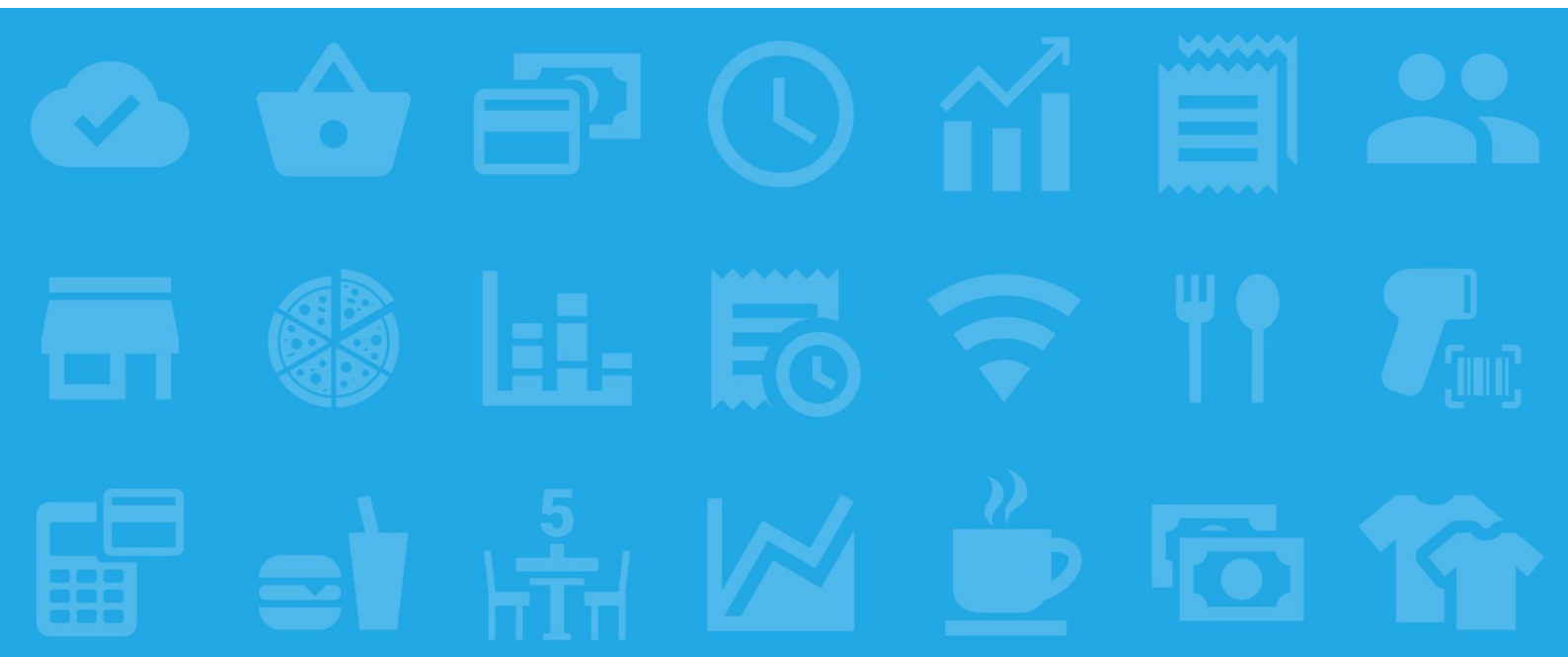


POS System and Inventory Management



User guide

Last updated: December 2019

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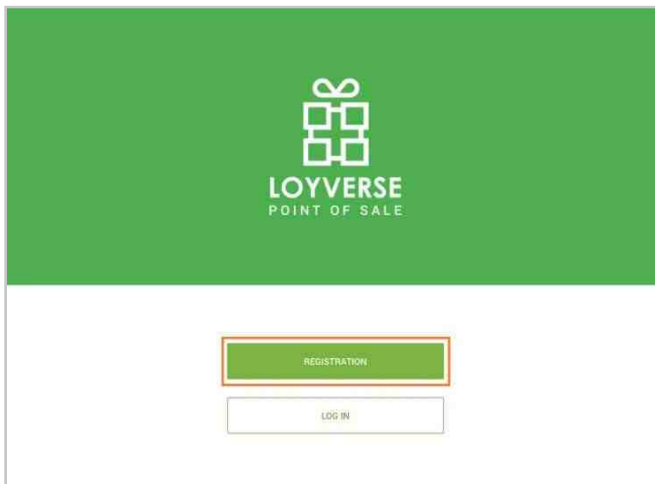
1. Getting Started



1.1 Getting Started

Download and install Loyverse POS from the Play Market or App Store. To use Loyverse POS, you'll need to have at least Android 4.2+ or iOS 9.0+.

1

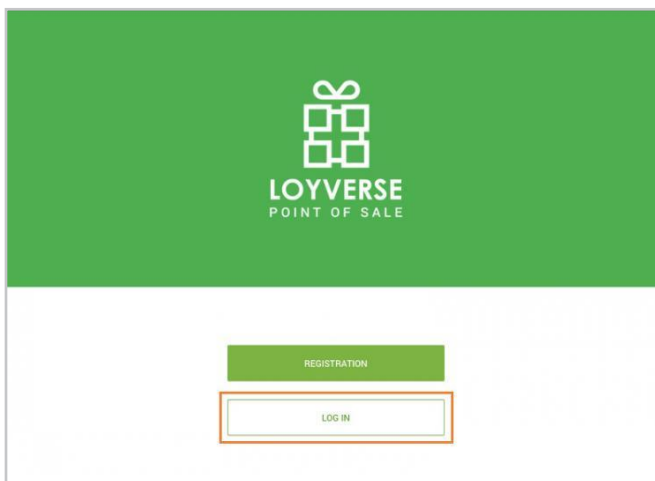


When you run the application, you will see the welcoming screen. If you have not yet registered on the website, you can register now by tapping on the 'Registration' button.

2

Create your account by filling in the simple registration form.

3



Go to your email inbox – you should have received a letter from Loyverse. Please open it and confirm your email address by following the link included in the letter.

Tap 'Login' button to enter the app.

4

Log in procedure:

- Enter the email address you used during registration.
- Enter your password.
- Press the 'Enter' button. You have successfully entered Loyverse POS.

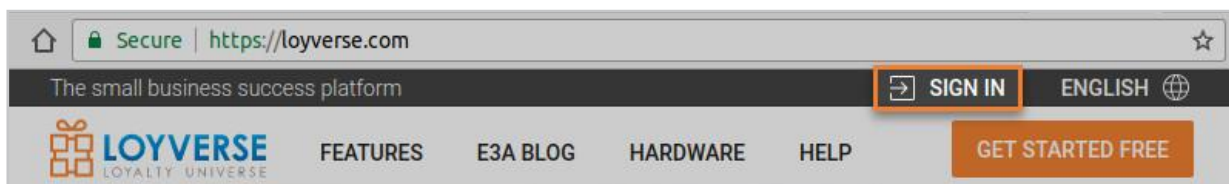
1.2 Setting up Your Shop in Loyverse Back Office

The Back office is your web-based office, working in synchronization with the Loyverse POS App. Once you have installed the Loyverse POS app, the next step is to go to your shop settings in the Back Office.

Google Chrome is recommended browser for using back office.

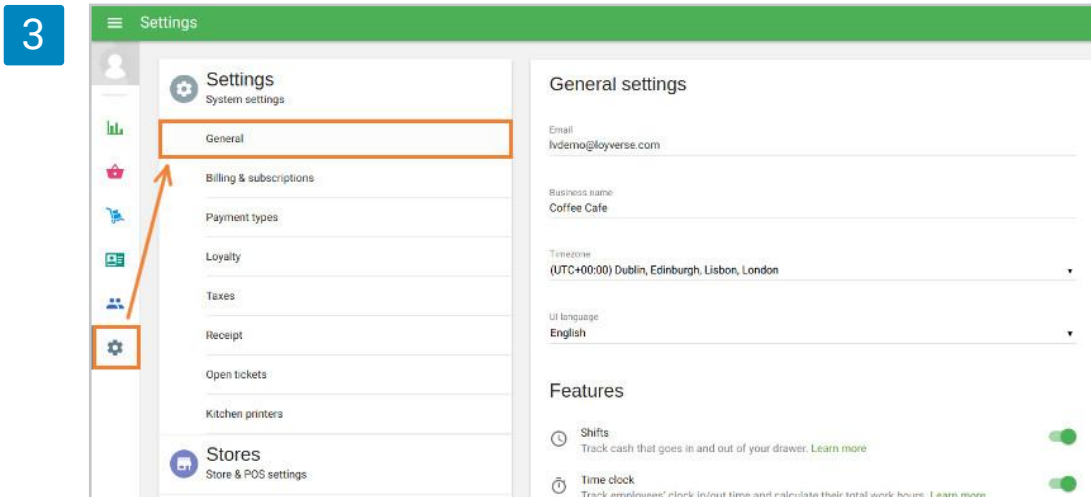
1

You can login to the Back Office from the Loyverse home page by clicking 'SIGN IN'.

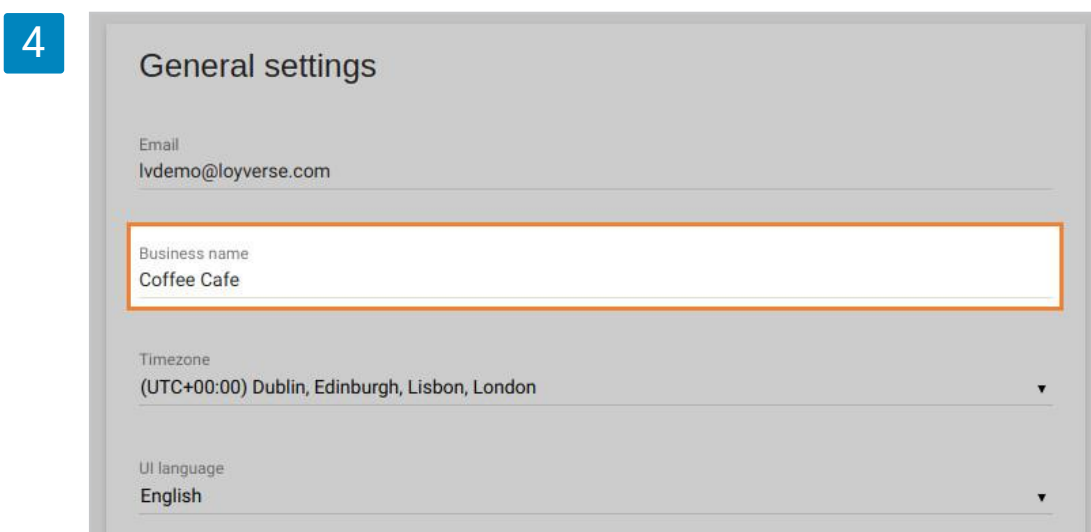


2

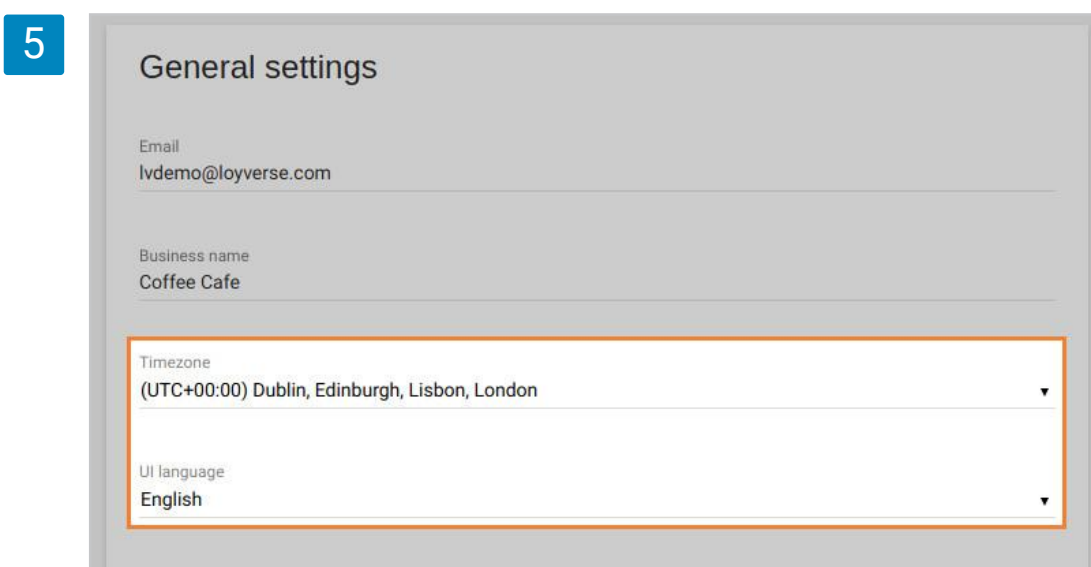
Enter the registered email and password.



Click on the Settings icon on the left menu to go to the General settings.

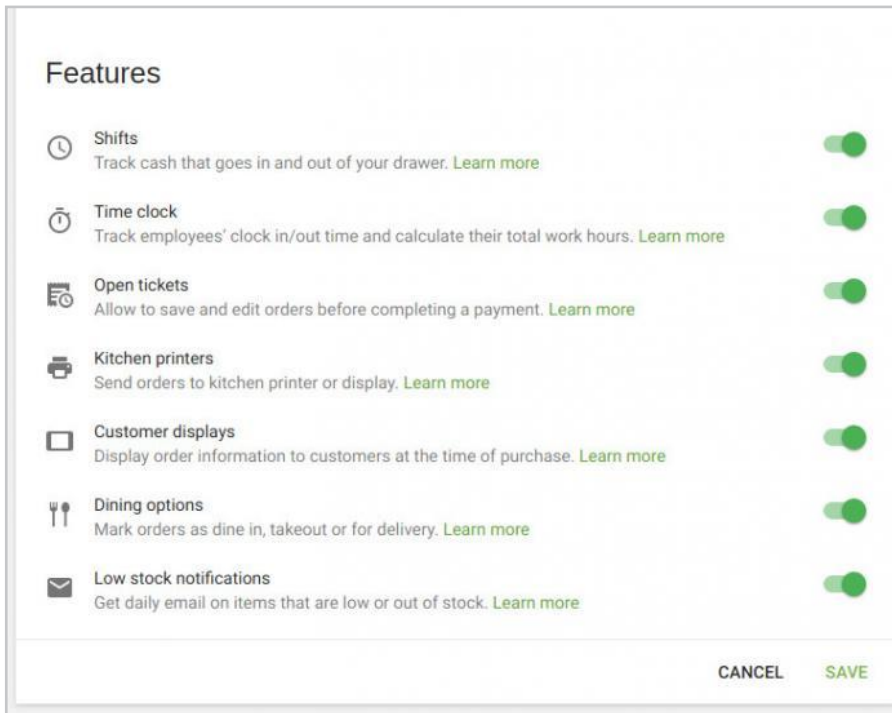


Fill in your business name.



Select your time zone, and choose language for the Back Office. Loyverse currently provides in more than 20 different languages.

6

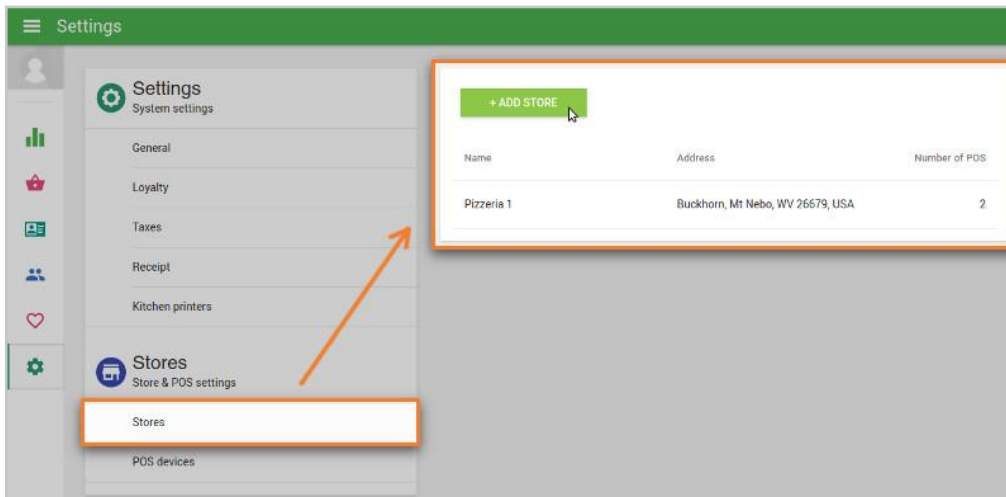


In the 'General Settings' section, you can switch on parameters such as 'Shifts', 'Time clock', 'Open tickets', 'Kitchen printers', 'Customer displays', 'Dining options', 'Low stock of notification'.

Once the profile settings are complete, press 'Save'.

1.2.1 Store Information

1



When you click 'Stores' in the Settings, you can enter your shop's address, description, and phone number.

2

Enter the store name and address.

3

Name	Address	Number of POS
Pizzeria 1	Buckhorn, Mt Nebo, WV 26679, USA	2

If you have more than one store, you can add them too.

4

Name	Status
POS-1	Activated

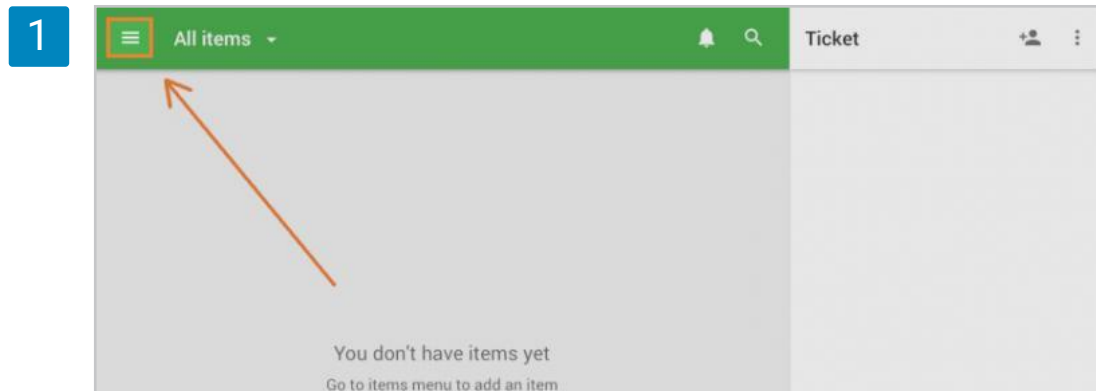
If you have more than one register, you can add a register in 'POS devices' under the 'Stores' section as well. Remember to click 'Save'.

After you finish setting up your shop in the Back Office, you can go to the Loyverse POS App to add products, make sales, and continue your business momentum!

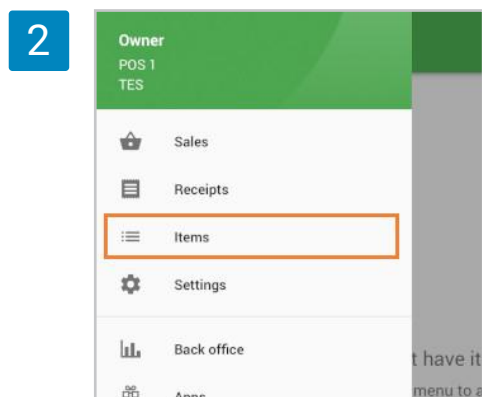
1.3 How to Add Items and Categories in Loyverse POS

1.3.1 Adding Items

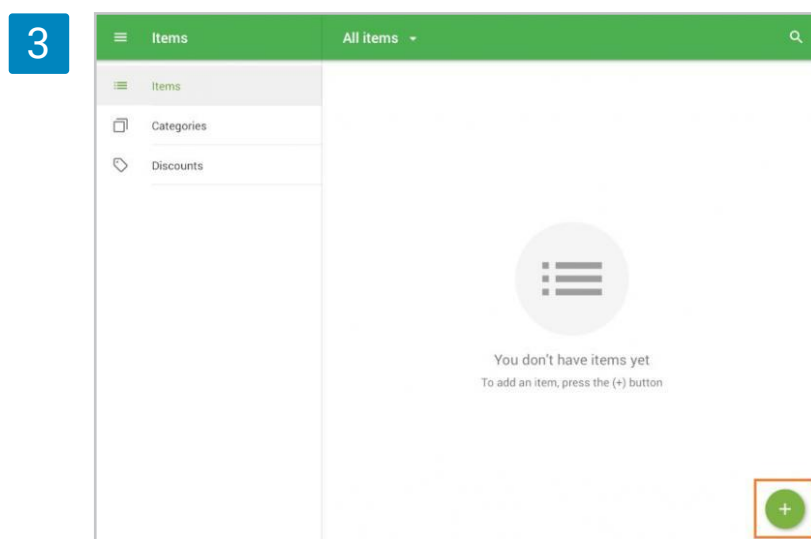
It's quick and simple to add items and categories in the Loyverse POS right from your smartphone or tablet.



Once you are logged in, press the ≡ (menu) button at the top left corner.



Next, select the 'Items' menu.



Then tap the ⊕ (add) button at the bottom right corner.

4

In the 'Create item' page, you can add details such as the 'Item name', 'Price', 'Category', and other details such as the SKU and Barcode, if necessary.

5

You can pick a color and shape for the item icon or take/upload its picture to display it on the sales screen.

1.3.2 Adding Categories

When you sell different types of items, it is easier to categorize your items systematically. You can add categories while adding the item, or you can go to the Categories page and follow these instructions:

1

In the 'Items' menu, tap the 'Categories' button. Tap the ⊕ (add) button at the bottom right corner.

2

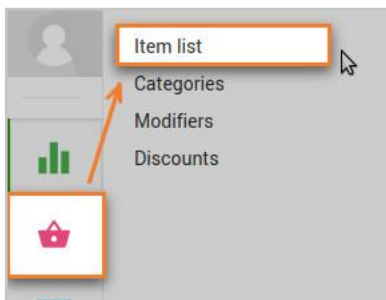
Specify the category name, select a category color, and press the save button. That's it – now you are ready to start selling!

You can access extended item settings at your Back Office on the web.

1.4 How to Add Items in the Loyverse Back Office

It's quick and simple to add items on the Loyverse POS on your mobile device. However, if you do this in the Back Office, you can have access to more features for the item.

1



Go to the 'Item list' menu.

2

Item name	Category	Cost	Price	M
Apple Juice	Juice	1.44	2.29	37
Banana	Fruits	0.88	2.19	59

In the Item list, click the 'Add item' button.

3

In the 'Create item' form, fill in the item 'Name' and choose the 'Category'.

4

Create item

Name: Cheesecake Category: Sweets

☒ The item is available for sale

Sold by: ☒ Each ☐ Weight

If you deselect the checkbox, 'The item is available for sale' it will not be seen in the items list in Loyverse POS on a mobile device. This usually needed for composite item's components.

Whether an item is sold by piece (bottle, package, etc.) or by weight (pound, kilogram, etc.), it is determined by the 'Sold by' option.

5

Sold by: ☒ Each ☐ Weight

Price: 7 Cost: 4

Leave the field blank to indicate the price upon sale

Fill in the 'Price' field with the selling price of your product. When you fill in the cost, later you can get useful reports about your profit, margin etc.

6

Price: 7 Cost: 4

Leave the field blank to indicate the price upon sale

SKU: 10015 Barcode:

The field SKU (Stock Keeping Unit) is required. It is filled in automatically. However, you can indicate your own SKU. The main requirement is that the number must not be repeated in other items and should not exceed 40 characters. You can use numbers and letters as well. Fill in Barcode, if necessary.

7

Inventory

Composite item ☐

Track stock ☐

In the inventory section, you can choose the options: 'Composite item' and 'Track stock'.

8

Inventory

Composite item ☐

Track stock ☒

In stock
100

Low stock
5

Item quantity at which you will be notified about low stock

By enabling 'Track stock' you can add the quantity of your stock level and the quantity at which you will receive the low stock notification.

9

Edit item

Inventory

Composite item ☐

Track stock ☒

Stores

☒ The item is available for sale in all stores

Available	Store	Price	In stock	Low stock
<input checked="" type="checkbox"/>	The Cofee 2	2.29	20	2
<input checked="" type="checkbox"/>	The Coffee	2.29	30	3

If you have multiple stores, you can manage the item parameters for each store, in the 'Stores' section: change the price, in-stock quantity, and quantity for low stock notification.

10

Taxes

Sales Tax (15 %) ☐

In the 'Tax' section, you can choose the taxes for your item.

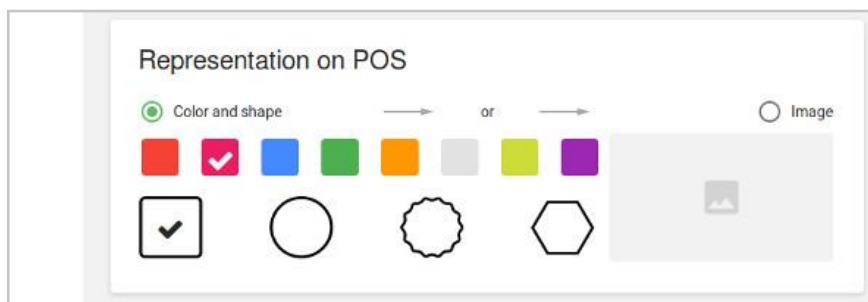
11

Modifiers

Addons ☐

In the 'Tax' section, you can choose the taxes for your item.

11

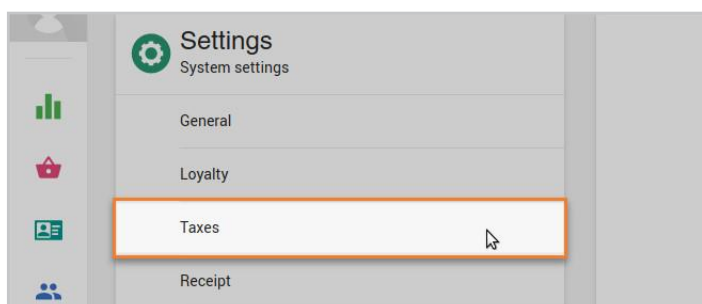


In the 'Representation on POS' section, you can pick a color and shape for the item icon or upload its' picture.

1.5 How to Configure Taxes

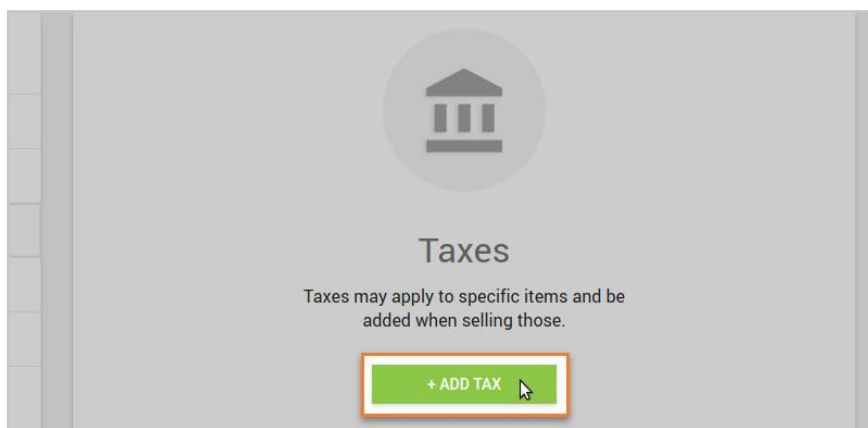
To configure taxes, you need first to sign in to the back office. After signing in, go to Settings.

1



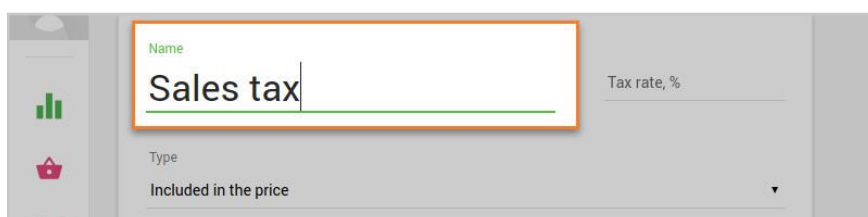
Then go to 'Taxes'.

2



Then press 'ADD TAX'.

3



And name the tax.

4

Name: Sales tax

Type: Included in the price

Tax rate, %: 15

Then input the tax rate.

5

Type: Included in the price

Apply the tax to the new items

CANCEL SAVE

And specify whether the tax should be included in the price, or if it will be added to the price at the counter.

6

Type: Included in the price

Option: Apply the tax to existing items

Select the items to which this tax should apply.

7

Option: Apply the tax to existing items

CANCEL SAVE

Then press 'Save'.

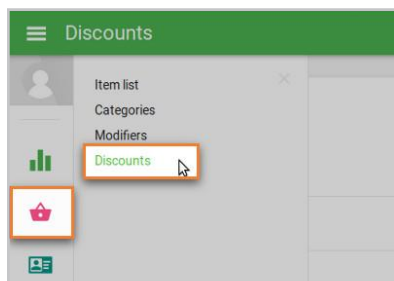
Now taxes are configured, they will be applied for each purchase.

1.6 How to Create and Configure Discounts

You can create and configure discounts at the back office and on the mobile App.

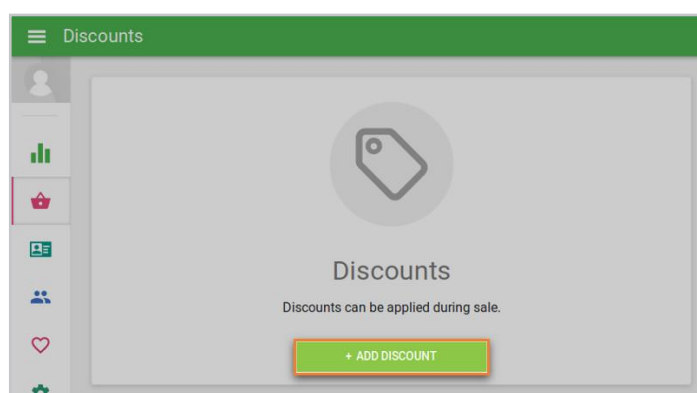
1.6.1 Discount set up in the Back Office

1



Next, select the 'Items' menu.

2



To create a discount, click on the '+ ADD DISCOUNT' button.

3

A screenshot of the 'Create discount' form in the Back Office. The form has a green header bar labeled 'Create discount'. The main content area is light grey and features a large circular icon of a discount tag. The form contains the following fields and options: a 'Name' field with the text 'Discount 10%', a 'Type' section with two radio buttons labeled 'Percentage' (selected) and 'Amount', a 'Value' field with the text '10', and a 'Restricted access' checkbox. To the right of the 'Value' field, there is a note: 'Leave the field blank to indicate the value upon sale'. Below the 'Restricted access' checkbox, there is a note: 'Employees have to enter correct PIN in order to apply a discount'. At the bottom of the form, there are two buttons: 'CANCEL' and 'SAVE'.

Fill in the 'Name' field. Then choose one of the two discount types: 'Percentage' or 'Amount'. The 'Percentage' discount can be applied to both the whole ticket or to individual items. The 'Amount' discount is applicable only to the whole ticket.

Fill in the 'Value' field.

If you choose the 'Percent' type of discount, then the number in the 'Value' field will specify the percentage that will be deducted from the items' original price or the whole ticket. The value of a percentage discount cannot be less than 0.01% or more than 100%.

If you choose the 'Amount' type of discount, then the number in the 'Value' field will specify a discount amount that will be deducted from the total value.

It is not always necessary to fill in the 'Value' field. You may specify the value of a discount during the sale. But you can apply such a discount only to the whole ticket.

4

Value
10

Leave the field blank to indicate the value upon sale

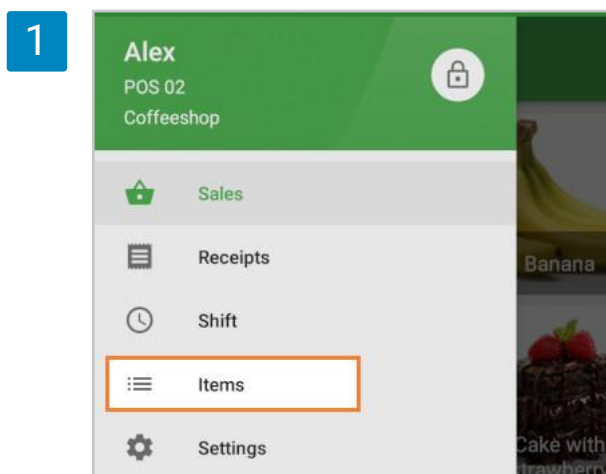
☐ Restricted access

Employees have to enter correct PIN in order to apply a discount

CANCEL SAVE

If the 'Restricted access' option is activated, then only the employees with the access right will be able to apply this discount.

1.6.2 Discount Setup in the Mobile Application



To create, view, edit or remove a discount, select the section 'Items' in the App's menu.

2

Items	Discounts
Items	Discount 10 10.00
Categories	Discount 10% 10%
Discounts	

Go to the 'Discounts' section where you will see all the discounts created in the Back Office and the app itself. If you want to create more discounts, tap the '+' button at the bottom right corner.

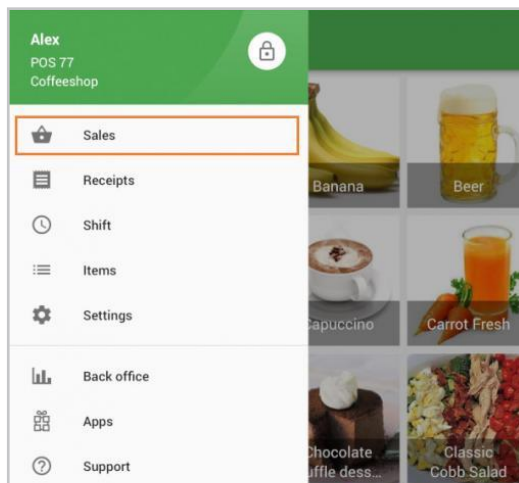
3

In the opened form, fill in the fields the same way as in the Back Office. Choose the discount type: percent – %, or amount – Σ.

Then, after you have created the discounts, you can apply them during the sale.

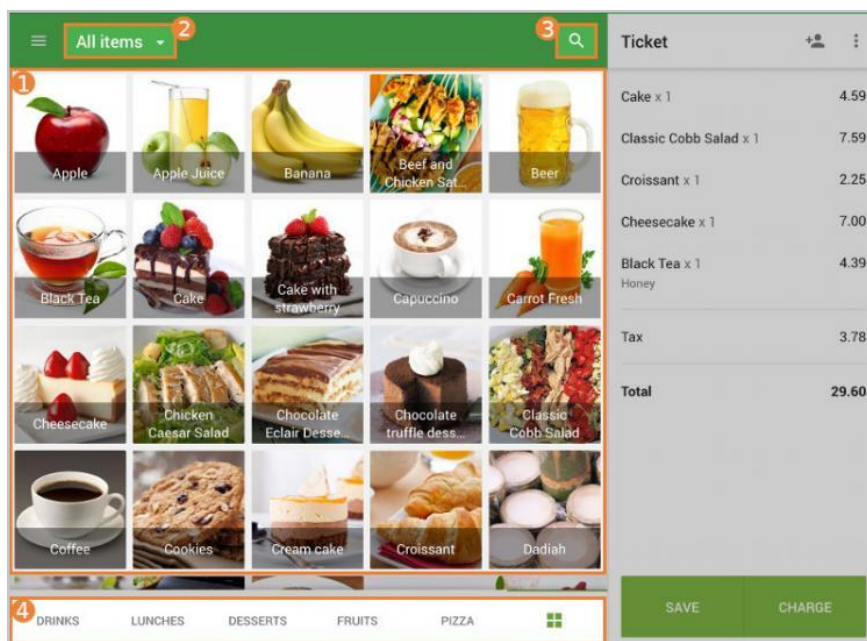
1.7 How to Make Sales

1

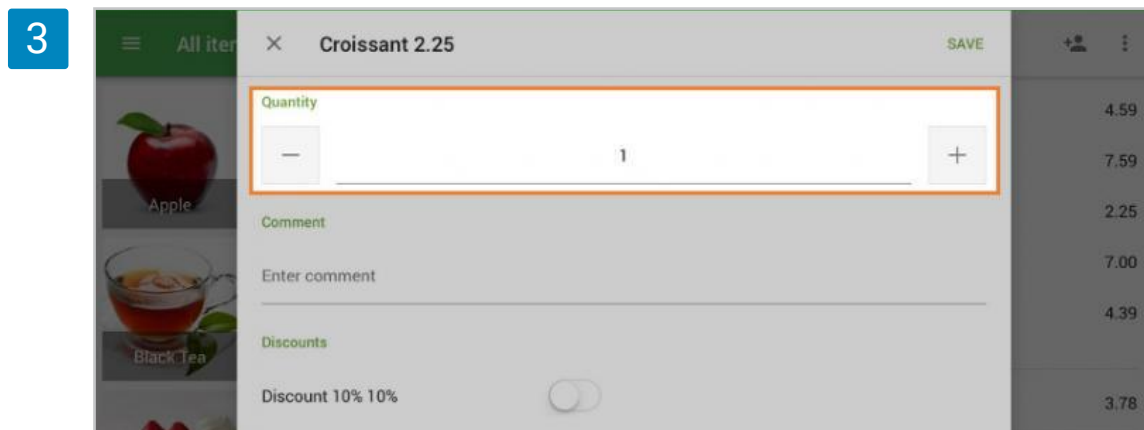


Launch your Loyverse POS app (Play Market or App Store) and go to the 'Sales' screen.

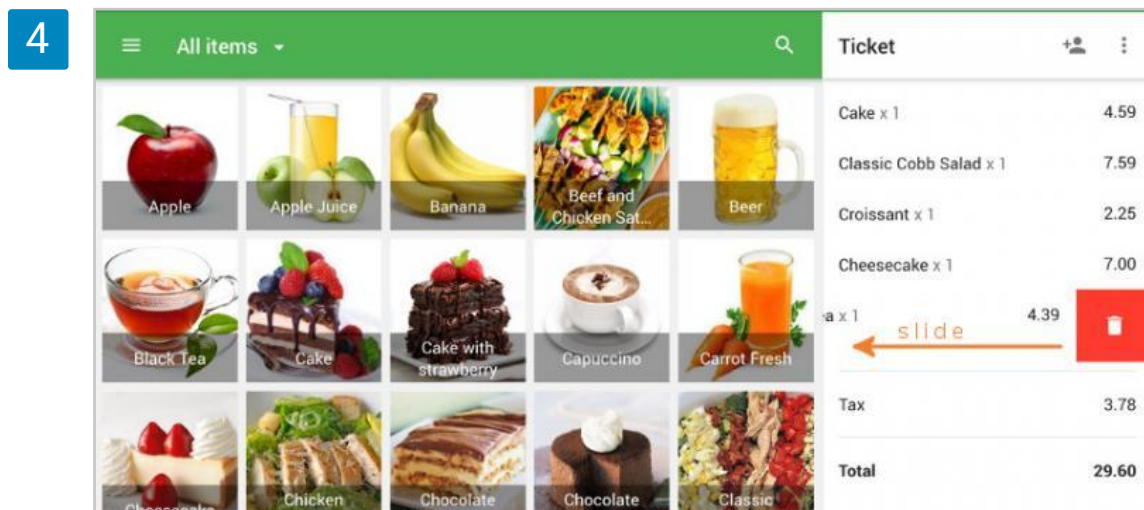
2



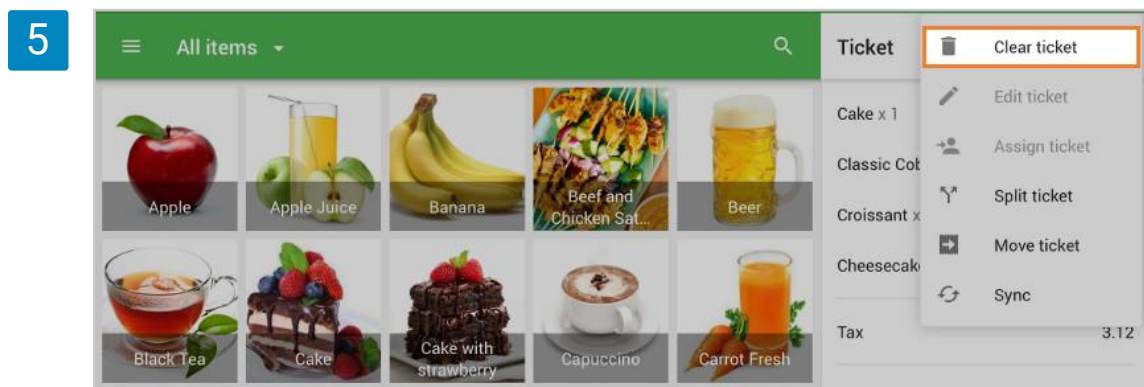
1. Tap on the item's image or icon on the sales screen to add the item to the ticket.
2. You can sort items by categories with the drop-down list 'All items'.
3. You can also use the search bar to look up items.
4. It is easy to find items by pages at the bottom of the screen.
(See How to Arrange Sale Screen in Loyverse POS).



You can change the quantity of the items by tapping the item in the ticket.

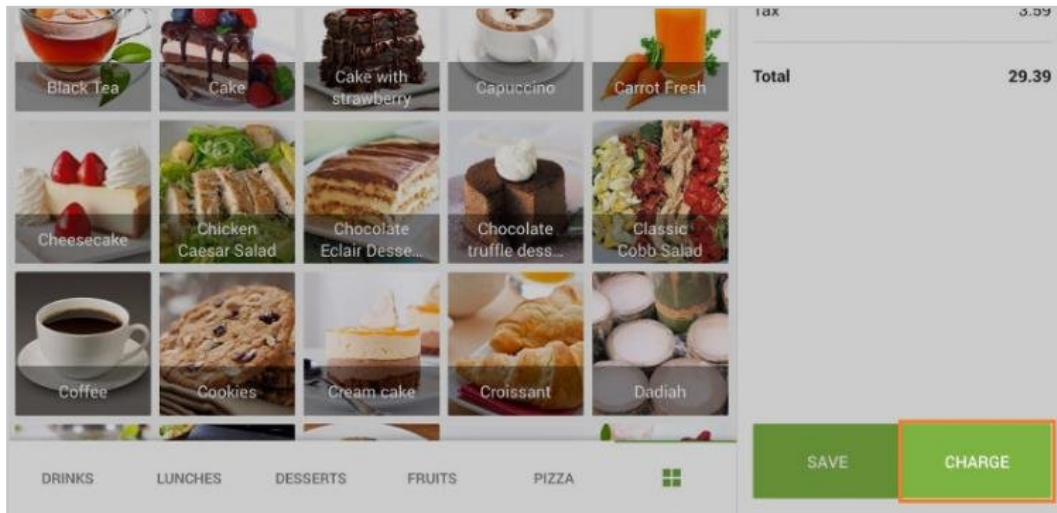


By sliding any selected item to the left, you can remove the item from the ticket.



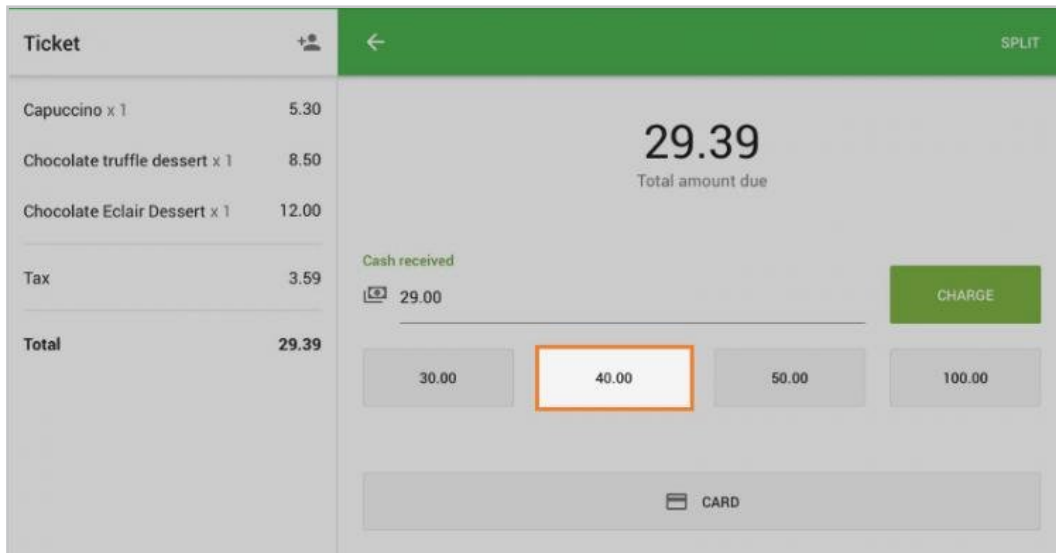
When you need to void a sale, tap the three dots menu (:) at the ticket header, then tap 'Clear ticket'.

6



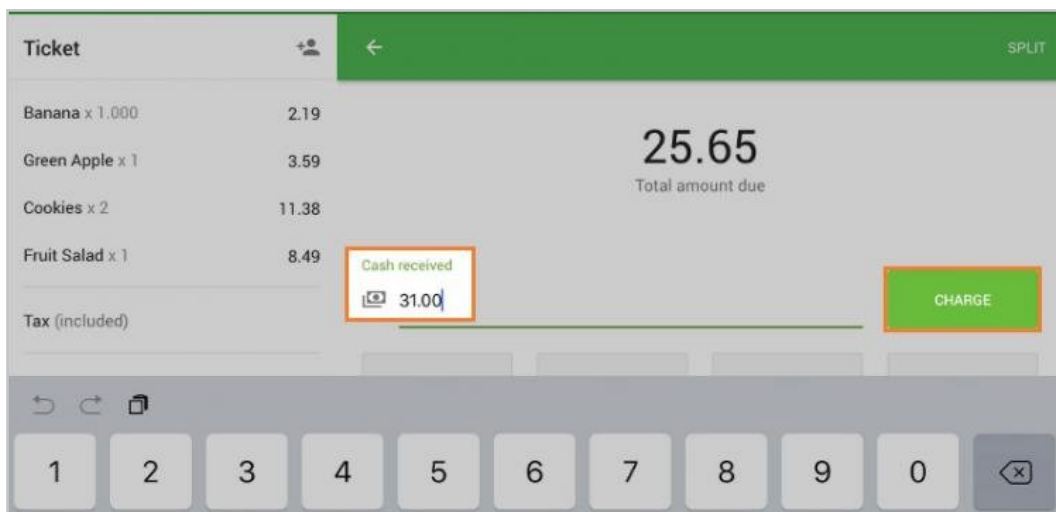
Tap the 'Charge' button in the bottom right-hand corner to proceed to the sale registration.

7



At the following dialog window, you can choose a type of payment for the purchase. If it is a cash payment, you can tap on the suggested amount.

8



Or if you want to add a custom amount of cash received from the customer, enter the amount in the 'Cash received' and then tap 'Charge'.

The screenshot shows a 'Ticket' window in a POS system. On the left, a list of items is displayed with their quantities and prices. In the center, a summary box shows the total paid and total change. At the bottom, there is a field to enter an email and a 'SEND RECEIPT' button.

Ticket	
Banana x 1.000	2.19
Green Apple x 1	3.59
Cookies x 2	11.38
Fruit Salad x 1	8.49
Tax (included)	
Total	25.65

25.65
Total paid

4.35
Total change

SEND RECEIPT

Once the payment is processed, you will see a window with a summary containing the total amount of sale and the change due.

You can choose to email the receipt to your customer or move on to a new sale.

2. Sales

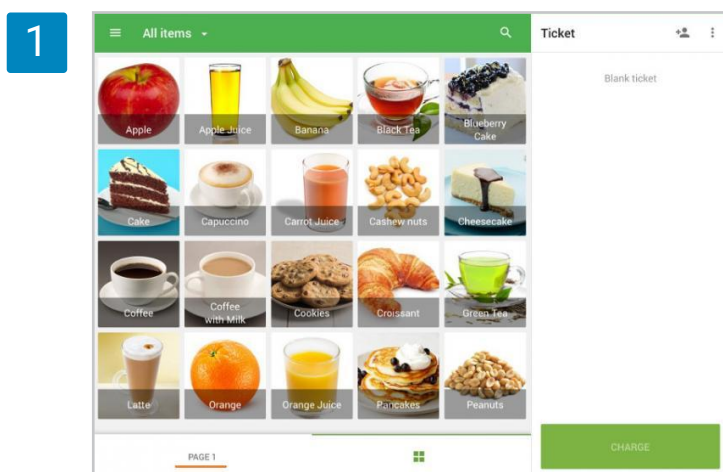


2.1 How to Arrange Sale Screen in Loyverse POS

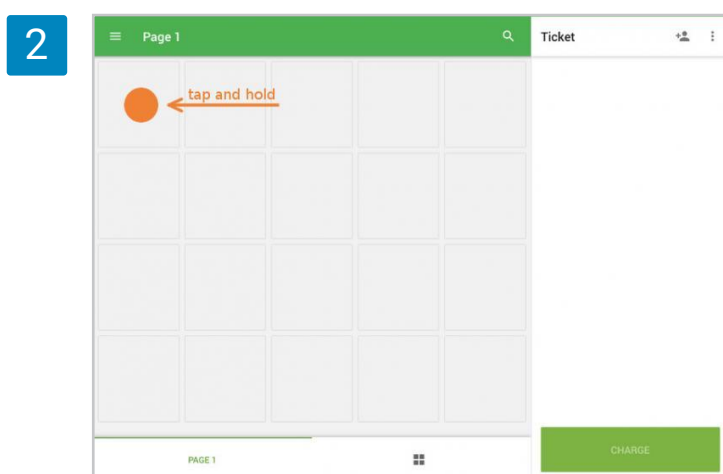
You can arrange your items on the sales screen of Loyverse POS (Android, iOS) in a suitable way by creating new custom pages and organizing the items there.

As a default, there is a page (marked by the grid icon) with all your items in an alphabetical order. You cannot change this page. However, you can organize the items on the custom pages.

2.1.1 Organizing of Items

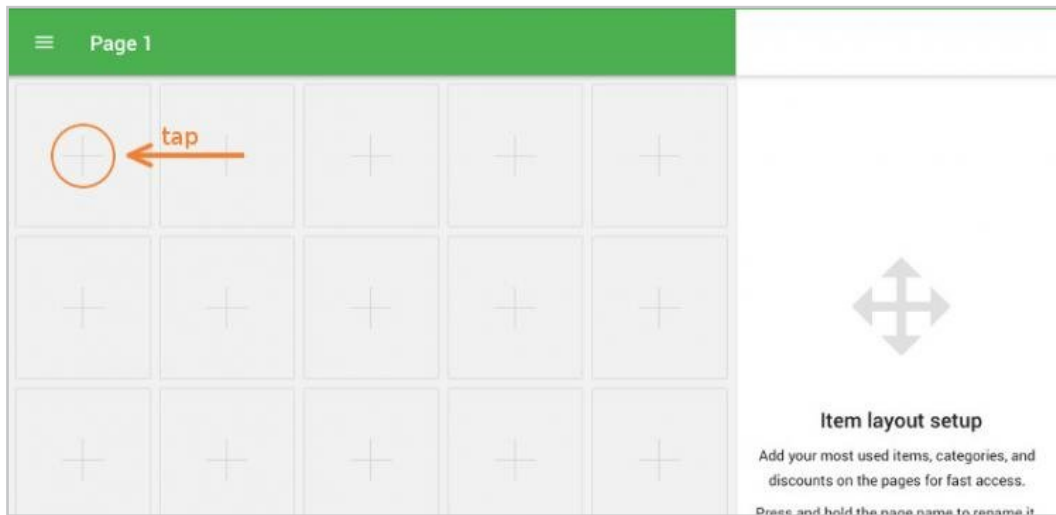


Open the sales screen on your POS. Go to the custom page 'Page 1'.



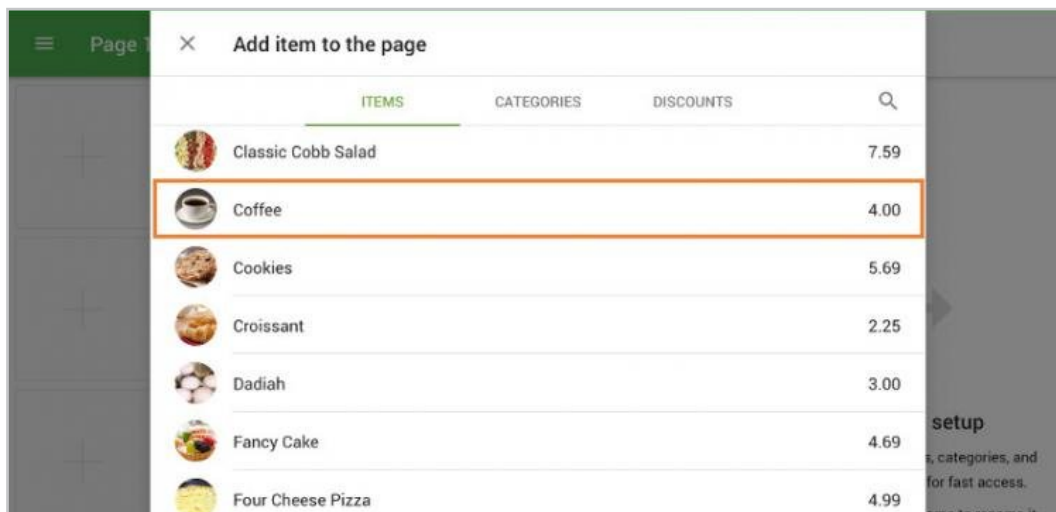
You will see a grid with empty squares. Tap and hold any square for a few seconds.

3



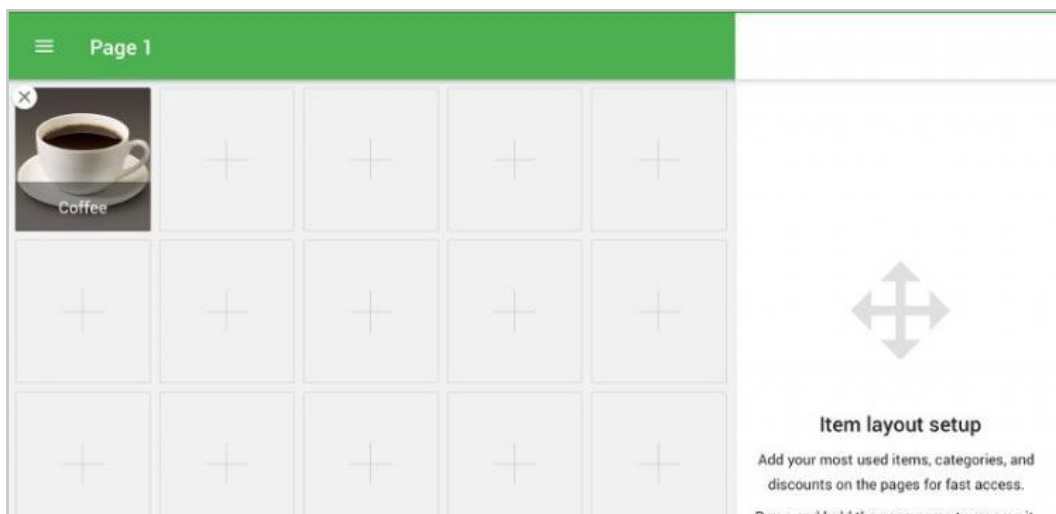
The screen will switch to the 'Item layout setup' mode. Tap any square containing the + sign.

4



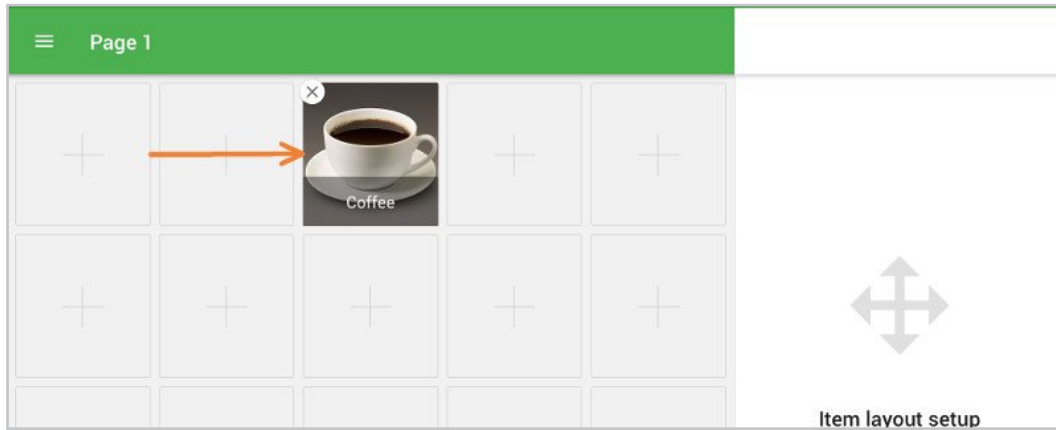
The item list will open in a new screen.

5



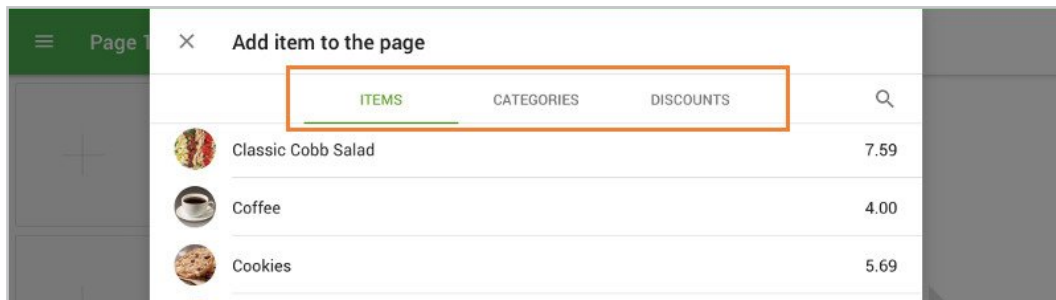
When you choose an item, it will fill the square.

6



By dragging and dropping the item icon, you can move it to another square.

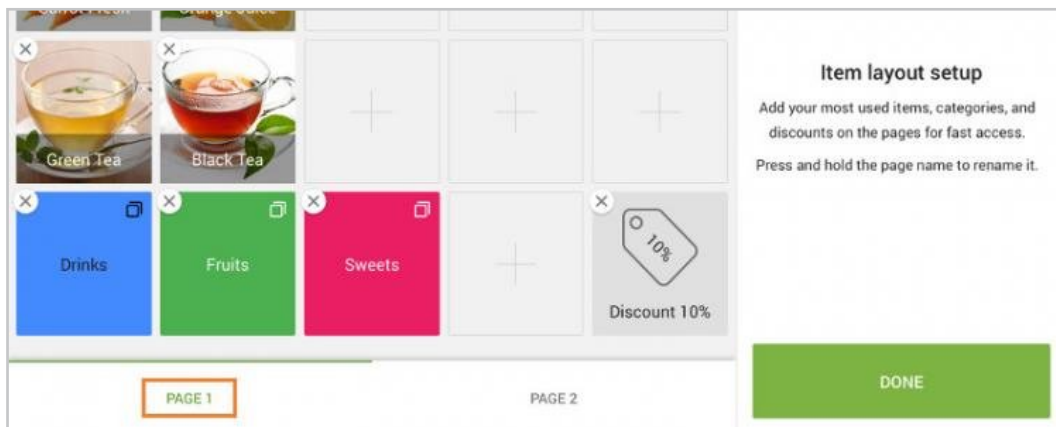
7



In the same way, you can add Categories and Discounts to the grid page.

2.1.2 Organizing Pages

1



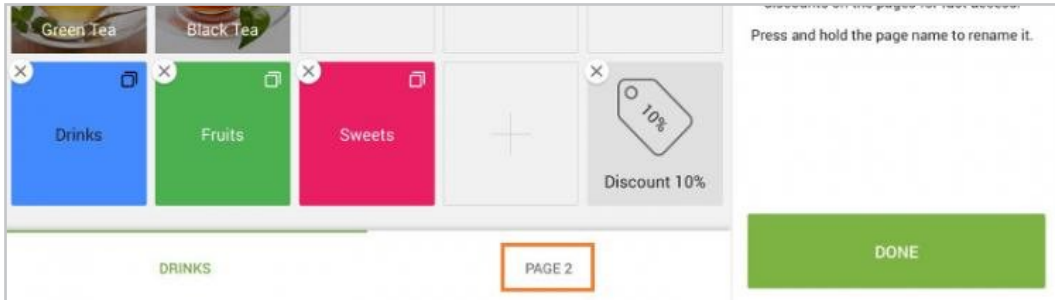
When you are in the setup mode, you can change the name of the page. Just tap and hold the page label for a few seconds.

2



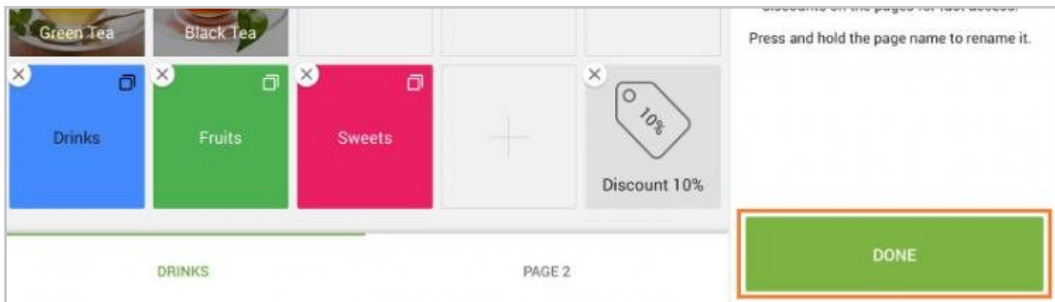
The editing screen will open. Fill in the 'Page name' field and tap 'Save'.

3



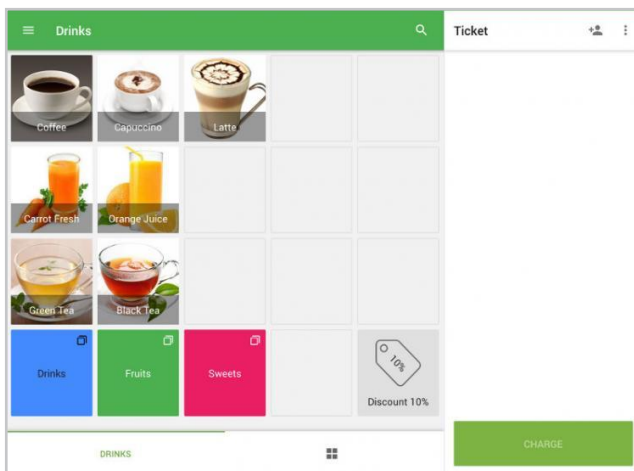
If you want to create another page, you can do it in the same way by tapping the next free page.

4



Tap 'Done' to save your layout. Pages without items will not be saved.

5

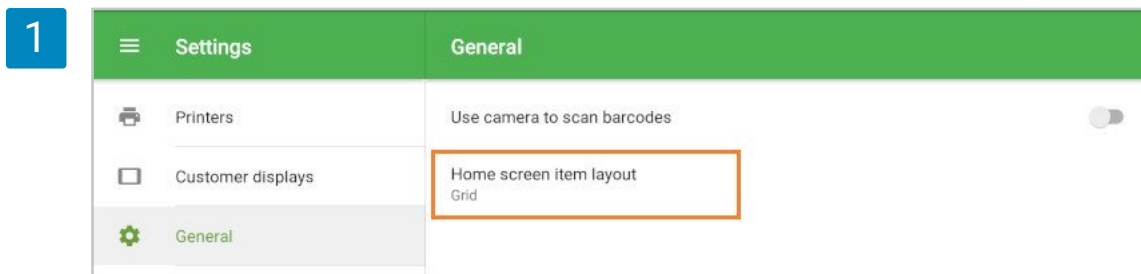


You will then be redirected to the sales screen. Just tap the items to add them to the ticket.

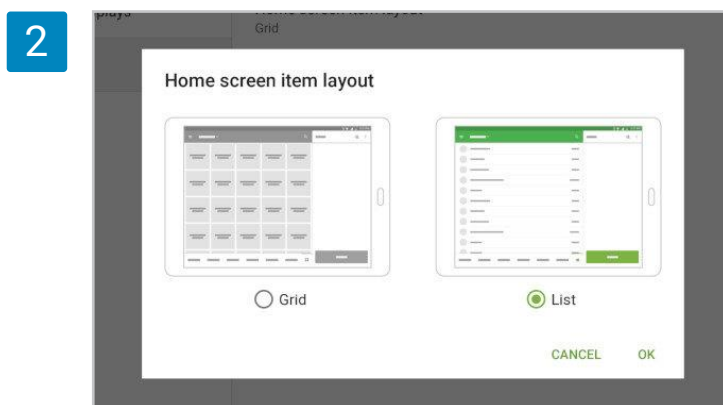
2.2 How to Change Home Sale Screen Layout

You can set your home sale screen layout either in a grid or list format. The feature allows you to find the desired items more conveniently and add them to the receipt.

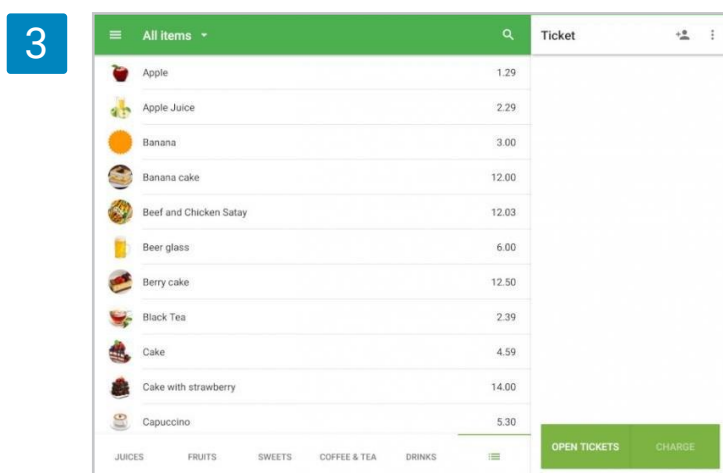
2.2.1 Sale Screen Item Layout for Tablets



By default, the home sale screen on tablets is set to the grid layout. To change settings, go to “General” under the application settings and tap ‘Home screen item layout’.



Choose the list option and save changes.



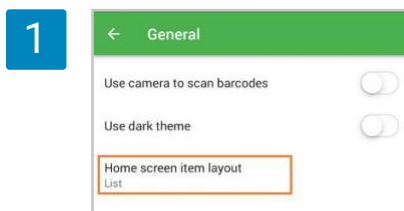
In this case, all the items will be listed in one column. This mode is useful when you have long names for your items, or when you want to see the price of the items.

Note

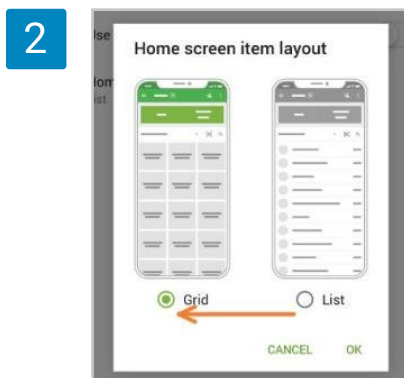
All the customized pages have a grid layout regardless of the settings of the home sale screen.

2.2.2 Sale Screen Item Layout for Smartphones

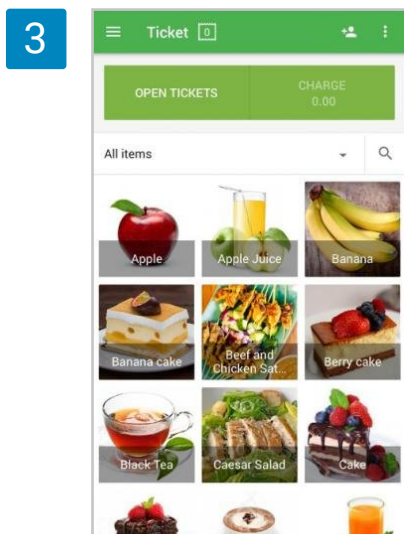
By default, the home sale screen on smartphones is set to the list layout.



To set your smartphone to the grid layout, go to 'General' under the application settings, and tap 'Home screen item layout'.



Choose the grid option and save changes.



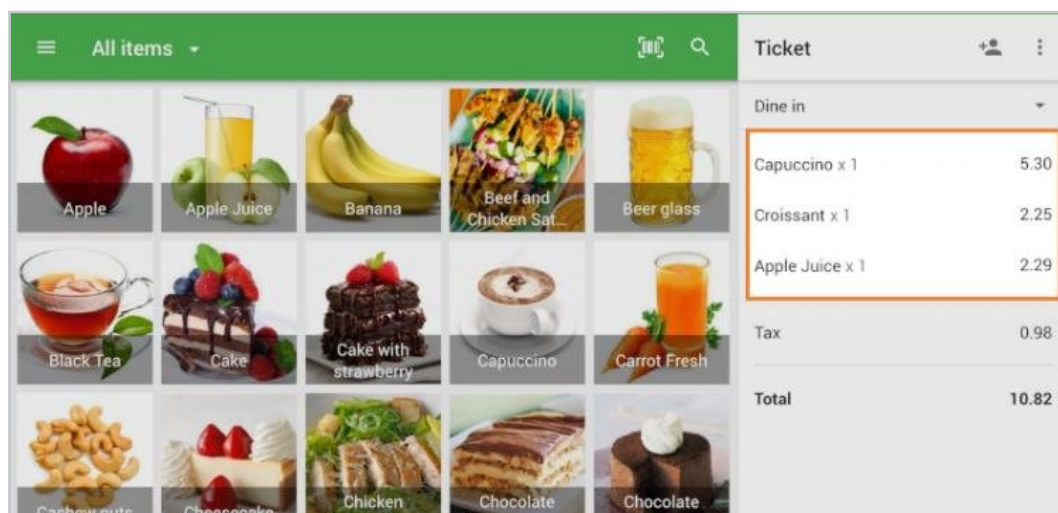
In this case, all the items on the sales screen are displayed in three columns. This mode is useful if you prefer to find items by its image or color.

2.3 How to Apply Discounts During a Sale

Before starting to use discounts during a sale, create and configure them in the back Office or the mobile app.

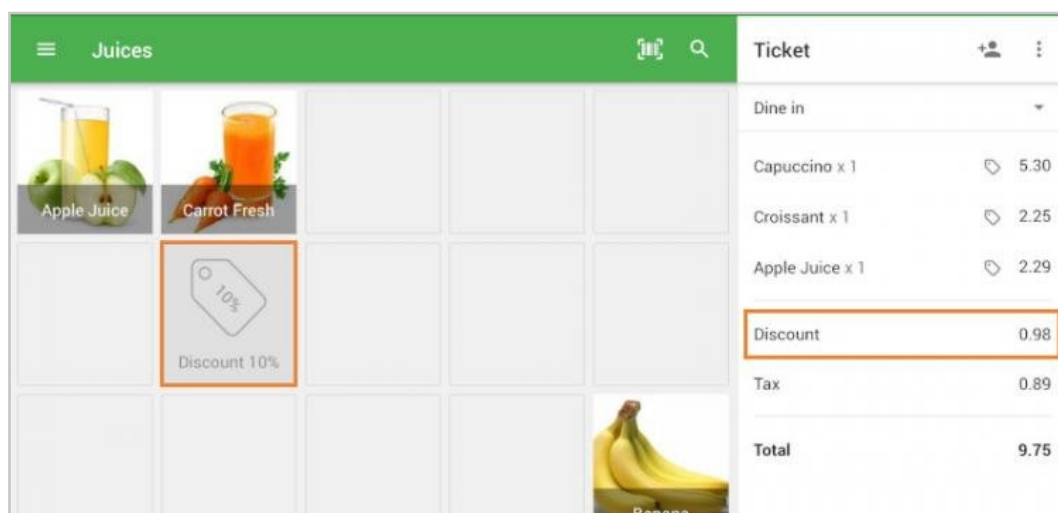
The 'Percentage' discounts can be applied to both the whole ticket and separate items. The 'Amount' discounts are applicable only to the whole ticket.

1



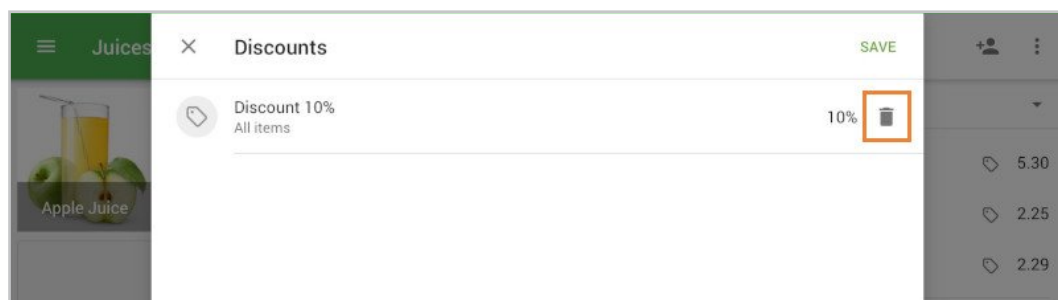
If you want to apply a discount to the whole ticket, first create the ticket by choosing items from the sale screen.

2



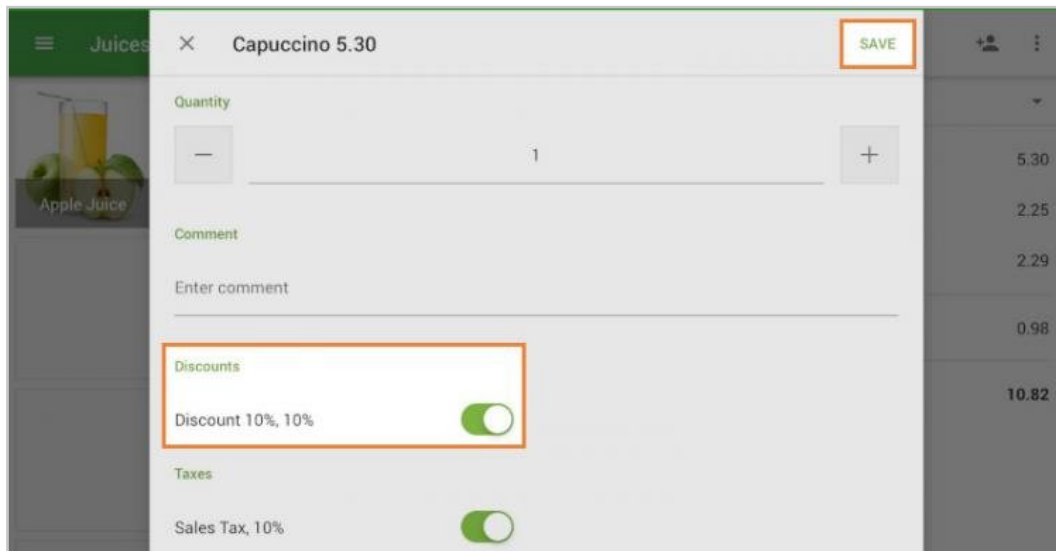
Choose the discount from the grid for tablets, or from the discounts section for smartphones. The discount will appear on the ticket, and the total amount will be reduced by the discount value.

3



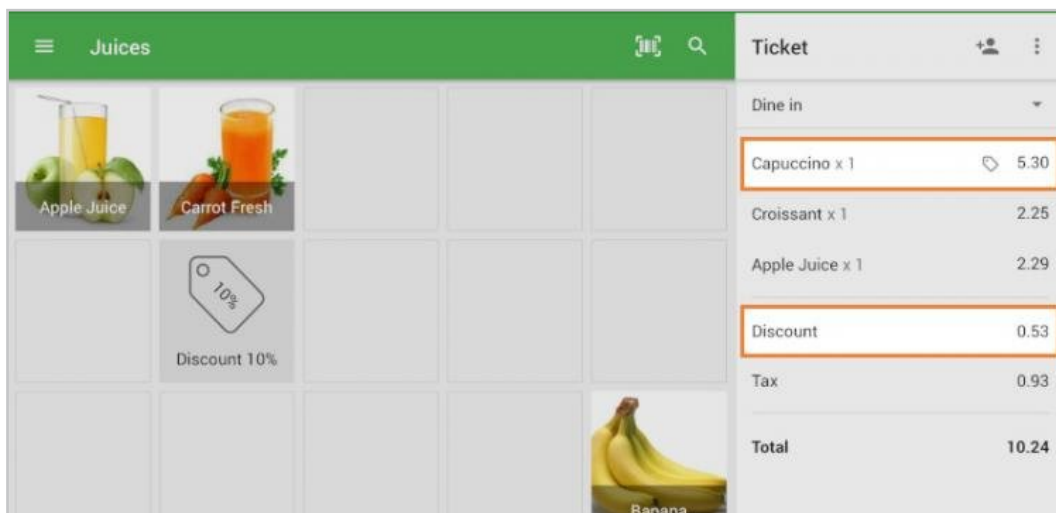
If you want to cancel it, tap the "Discount" line on the ticket. In the opened window, tap the trash icon.

4



In order to apply a discount to a specific item, tap the item in the current ticket. The window to edit items in the ticket will open. In the discounts section, you will see the available discounts. Switch on the desired one, and save changes by tapping the 'Save' button.

5



Afterward, the discount with its value will appear on the ticket, and the discount sign will appear next to the item.

Now, you can continue the finalization of the sale as usual.

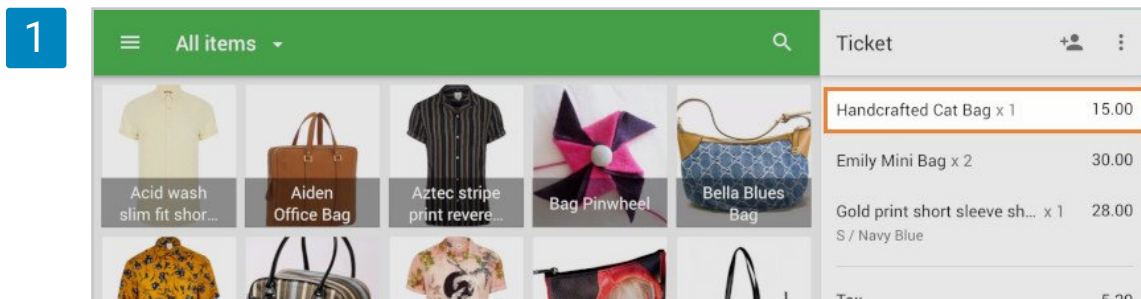
Note

In case of applying multiple discounts (percentage, amount, and customer points), the system will automatically apply them in the order of lower to higher discount value.

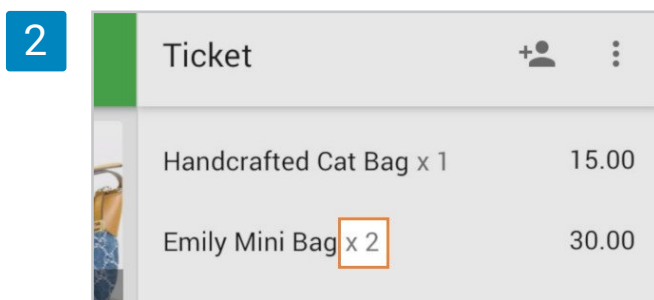
2.4 How to Sell Items Using Barcode Scanners

Barcode scanners can be used with Loyverse POS to quickly add items to a ticket. Before making sales, make sure that your scanner is paired with Loyverse POS and the items have barcodes.

Launch your Loyverse POS app (Android, iOS) and go to the Sales screen, in the same way as when selling without a scanner.



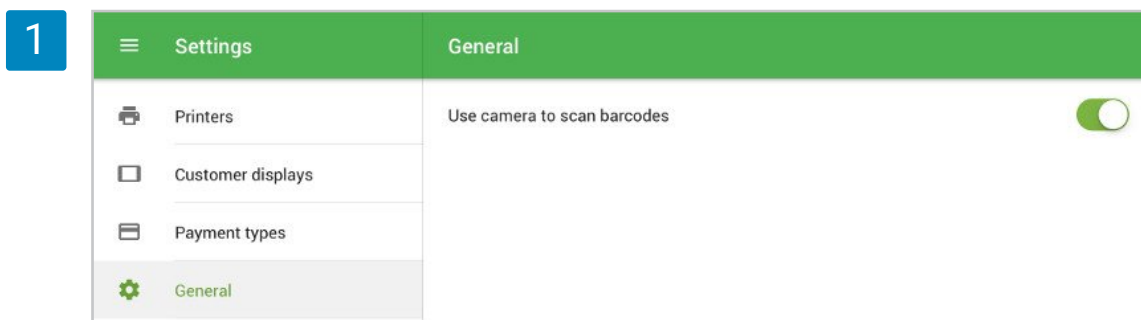
When you scan your item's barcode with a scanner, this item will appear in your ticket.



If you scan the same barcode one more time, the number of items will increase by one.

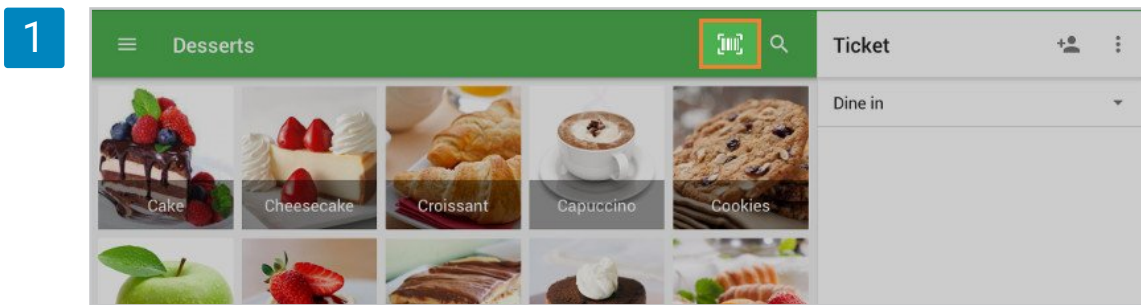
2.5 Barcodes Scanning by Built-in Device Camera

The built-in rear camera of Mobile Device can be used to scan item barcodes during sale or when adding new items to the list.

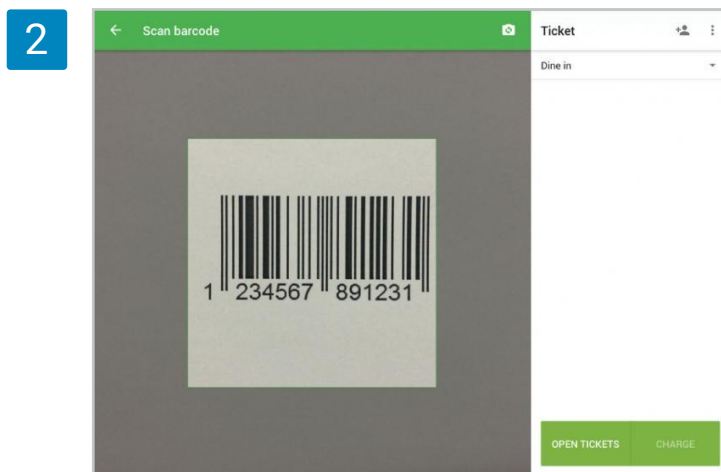


First, you have to activate the option 'Use the camera to scan barcodes' on Loyverse POS app (Android, iOS) in the General Settings.

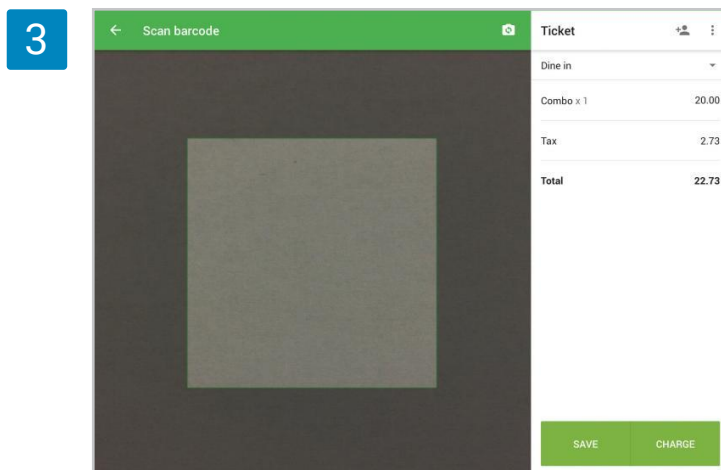
2.5.1 Selling Items



Launch your Loyverse POS app and go to the Sales screen, same as when selling without a scanner. Tap the button for scanning barcodes with the built-in camera.



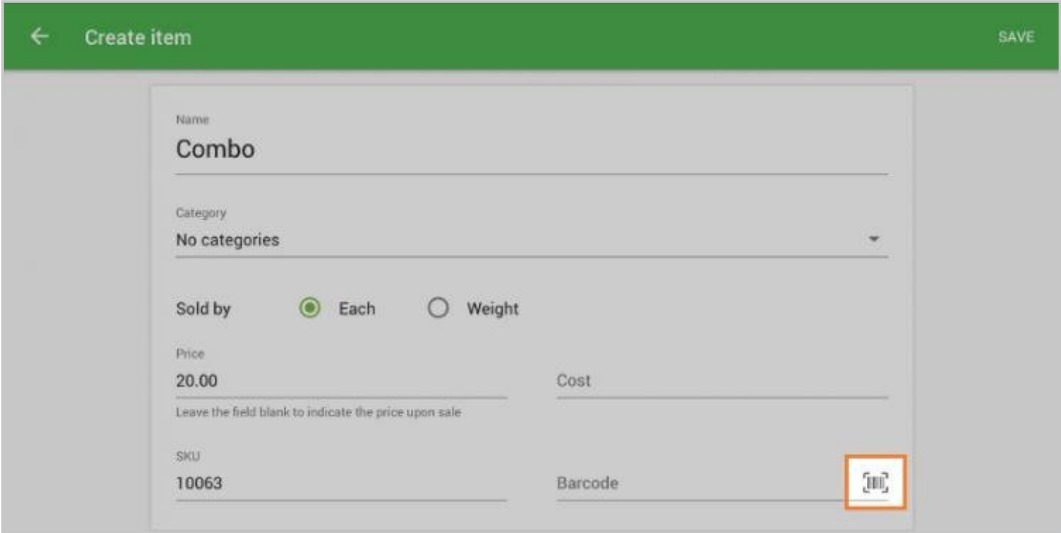
Point the camera at the barcode of your item.



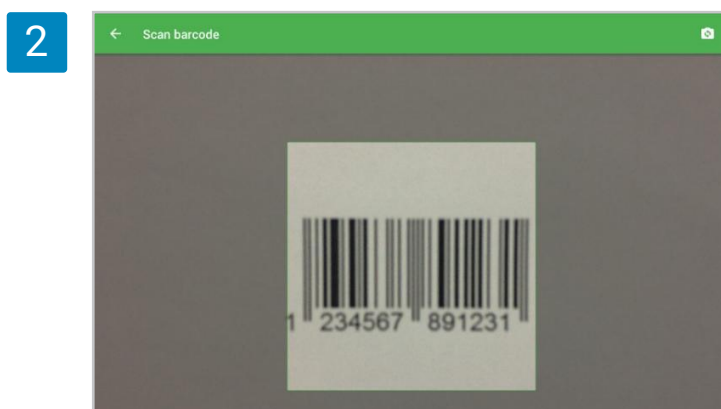
The screen with the camera will remain open, so you can scan another barcode, or edit items in the ticket, search for a client to add to the ticket, redeem customers points, save or merge open tickets.

2.5.2 Adding Barcodes to Items

1



In the Loyverse POS 'Items' menu, open the item for editing and tap the scan button near the Barcode field.




The screen with the camera will be activated, so point the camera at the barcode.

3



In the Loyverse POS 'Items' menu, open the item for editing and tap the scan button near the Barcode field.

4



The screen with the camera will be activated, so point the camera at the barcode. If any item does not have this barcode, the new item will be created and opened for editing with the filled-in barcode. If there is already an item with this barcode, it will open for editing.

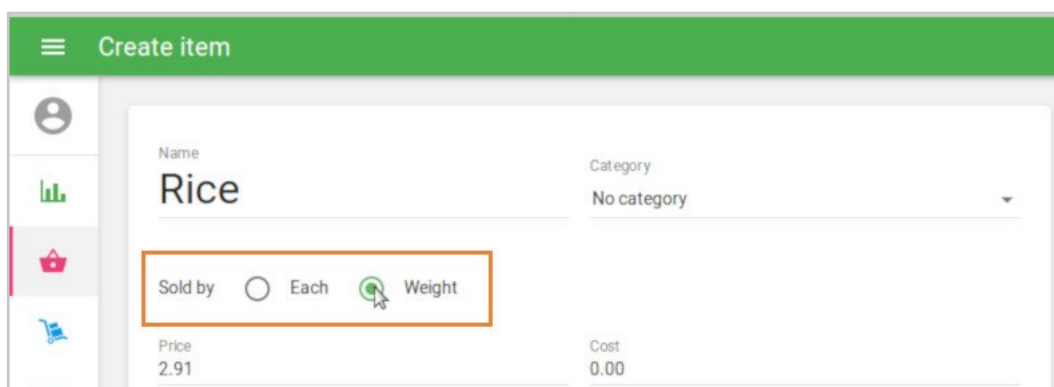
Note

Loyverse POS with built-in camera can scan UPC-A, UPC-E, EAN-13, EAN-8, Code 39, Code 93, Code 128 barcodes and QR code as well.

2.6 How to Sell Items by Weight

Whether an item is sold by piece (bottle, pack, etc.) or by weight (pound, kilogram, etc.) is determined by the 'Sold by' option found in the item description. You can change this option both in the Back Office and the Loyverse POS app (Android and iOS).

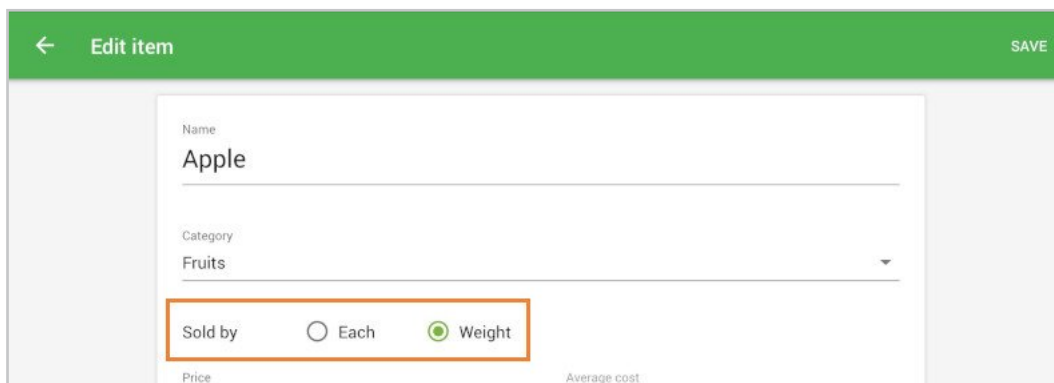
1



The screenshot shows the 'Create item' screen in the Loyverse POS app. The item name is 'Rice' and the category is 'No category'. The 'Sold by' options are 'Each' and 'Weight'. The 'Weight' option is selected, indicated by a green dot and a cursor. The price is 2.91 and the cost is 0.00.

If you want to change the option from the Back Office, first log in to the Back Office, go to 'Item list', and open the existing item to edit or create a new item.

2



The screenshot shows the 'Edit item' screen in the Loyverse POS app. The item name is 'Apple' and the category is 'Fruits'. The 'Sold by' options are 'Each' and 'Weight'. The 'Weight' option is selected, indicated by a green dot. The price is 2.91 and the average cost is 0.00.

If you want to change the option from the Loyverse POS app, go to 'Items' section and tap the existing item to edit or create a new item.

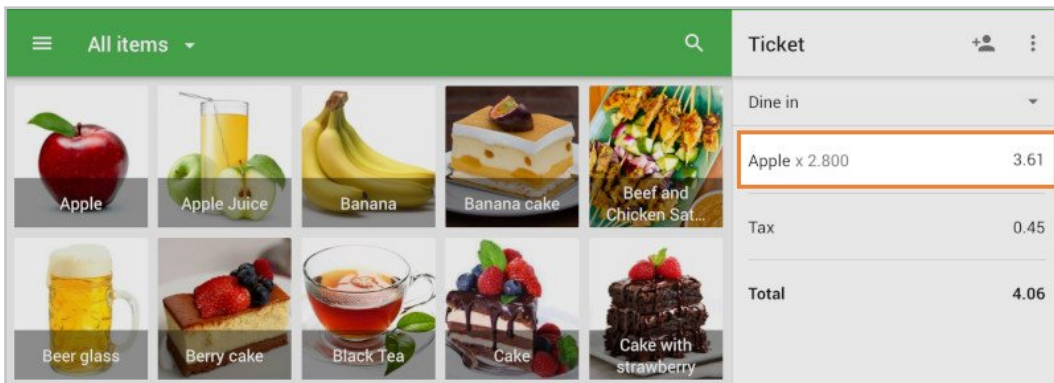
In both cases, set the 'Sold by' option to 'Weight'. Enter the item price per one unit of weight, such as kilogram, pound, etc. Save your edits.

3



When you sell the item, a number pad will appear on the screen. Enter the actual weight of the item and tap 'OK'.

4



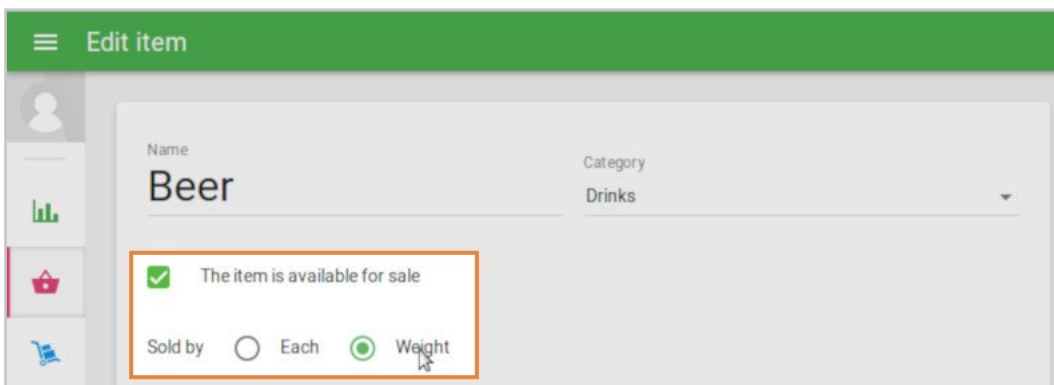
The item will be added to the ticket with the price for a unit of weight multiplied by the actual weight.

2.7 How to Sell Liquids

There are two approaches to sell liquids with Loyverse POS.

2.7.1 Through Selling by Weight Option

1



Open your liquid item for editing in the Back Office or Loyverse POS app (Play Market or App Store). Assign the 'Sold by' option to 'Weight'.

Enter the item price per one liquid measure, for example per one liter (you may indicate the measure in the name of the item, for instance, 'Beer 1L'). Save your edits.

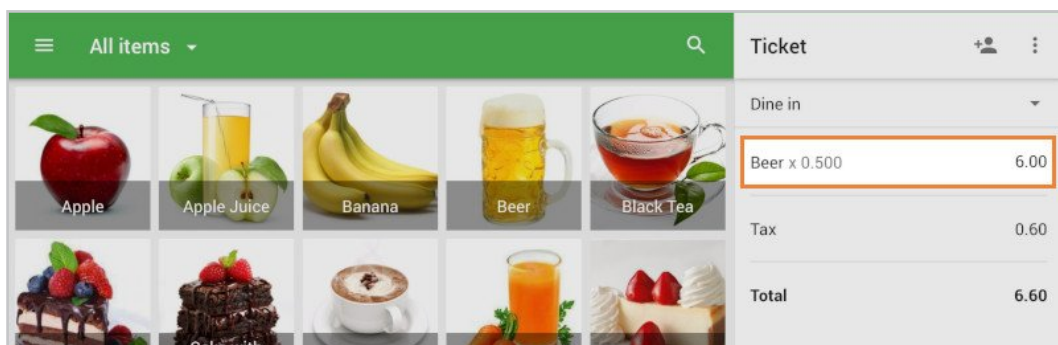
2



Now, during a sale of such item, a number pad will appear on the screen. Enter the amount in proportion to a liter for the item and tap 'OK'.

For example, you sell 500 ml of the liquid item, and your measure is a liter. Then you tap 0.5 in the Quantity field.

3

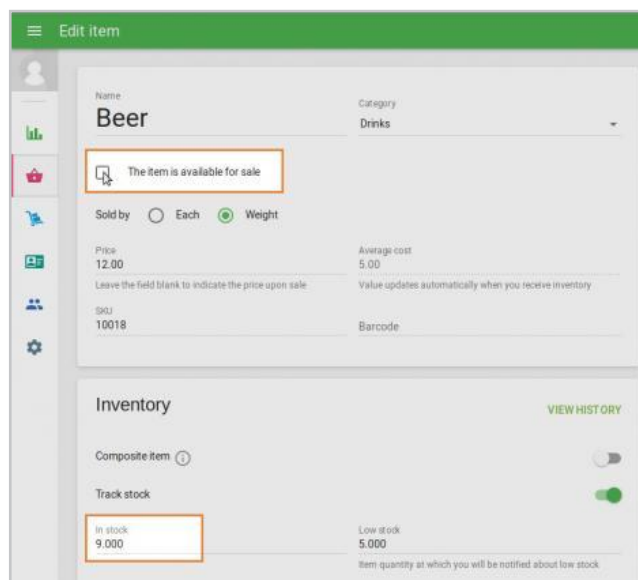


Then, your item will be added to the ticket with the price shown as the price for a liter multiplied by the actual selling portion. The sold amount will be deducted from the stock for this liquid item.

2.7.2 Selling Like Composite Item

If you sell by a particular set of liquid volumes (for example, drinks in shots or pints), you can use composite items.

1



First, create the component of your liquid item in the 'Item list', and set the amount of stock. If you don't want to sell this component besides as predefined sets of volumes, deselect the check-box 'The item is available for sale' so that it will not be shown in the items list during sales.

2

Edit Item

Name: Beer 0.5 L Category: Drinks

☒ The item is available for sale

Sold by: ☒ Each ☐ Weight

Price: 6.00 Cost: 2.50

Leave the field blank to indicate the price upon sale. Calculated as the sum of cost of components

SKU: 10010 Barcode: SDA-sku-3456

Inventory

Composite item: ☒

Use production: ☐

Component	Quantity	Cost
Beer SKU 10010	0.500	2.50

Item search

Total cost: 2.50

Then create your set of liquid volumes from this component item. Each composite item should have the quantity field filled in with the liquid volume.

For example, you are selling Beer by a volume of 500 ml. Create a composite item "Beer 0.5 L". Choose the component 'Beer', and set the appropriate quantity. In this case, it is 0.5 L.

Then, with every sale of predefined sets of volume items, the stock of the component of the liquid item will be deducted by the sold amount.

2.8 How to Split Payment with Loyverse POS

Sometimes, customers ask to split the total of the ticket into several partial payments. It is also possible to select a different payment type for each partial payment.

1

Capuccino Carrot Fresh Cashew nuts Cheesecake Cherry cake

Chicken Caesar Salad Chocolate Eclair Dessert Chocolate sausage Chocolate truffle dessert Classic Cobb Salad

SAVINGS FRUITS SWEETS COFFEE & TEA DRINKS

SAVE CHARGE

Total: 35.18

After adding items to the ticket, tap 'Charge'.

2

Ticket

Dine in

Black Tea x 1 4.39
Honey

Cake x 1 4.59

Carrot Fresh x 1 4.99

Capuccino x 1 5.30

Chocolate Eclair Dessert x 1 12.00

Tax 3.91

Total 35.18

35.18
Total amount due

Cash received
35.18

CHARGE

36.00 37.00 40.00 50.00

CARD

SPLIT

In the payment window, tap 'Split'.

3

Ticket		← Remaining 35.18	
Dine in		<div> <div>−</div> <div>2</div> <div>+</div> </div> <div>Payments</div>	
Black Tea x 1 Honey	4.39		
Cake x 1	4.59		
Carrot Fresh x 1	4.99		
Capuccino x 1	5.30		
Chocolate Eclair Dessert x 1	12.00		
Tax	3.91		
Total	35.18		

<div> <div>🗑️</div> <div>Cash</div> <div>▼</div> </div>	17.59	CHARGE
<div> <div>🗑️</div> <div>Cash</div> <div>▼</div> </div>	17.59	CHARGE

Use '+' or '-' buttons to set up the number of partial payments.
By default, the entire amount will be split evenly.

4

Ticket		← Remaining 35.18	
Dine in		<div> <div>−</div> <div>2</div> <div>+</div> </div> <div>Payments</div>	
Black Tea x 1 Honey	4.39		
Cake x 1	4.59		
Carrot Fresh x 1	4.99		
Capuccino x 1	5.30		
Chocolate Eclair Dessert x 1	12.00		
Tax	3.91		

<div> <div>🗑️</div> <div>Cash</div> <div>▼</div> </div>	17.59	CHARGE
<div> <div>🗑️</div> <div>Card</div> <div>▼</div> </div>	17.59	CHARGE
<div> <div>🗑️</div> <div>Sumup</div> <div>▼</div> </div>		

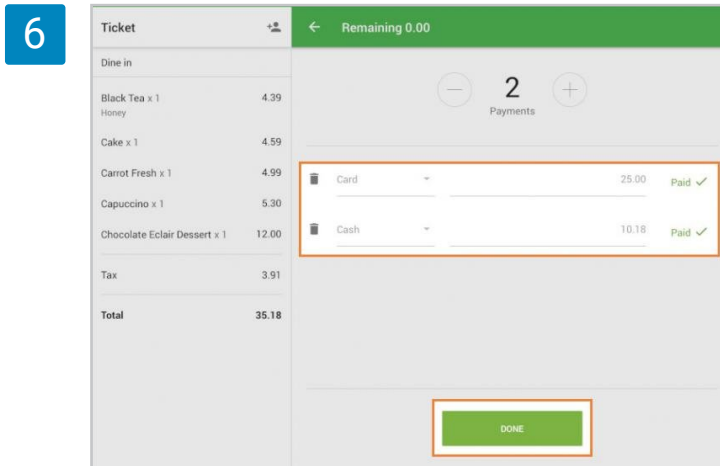
Select the payment type for each payment.

5

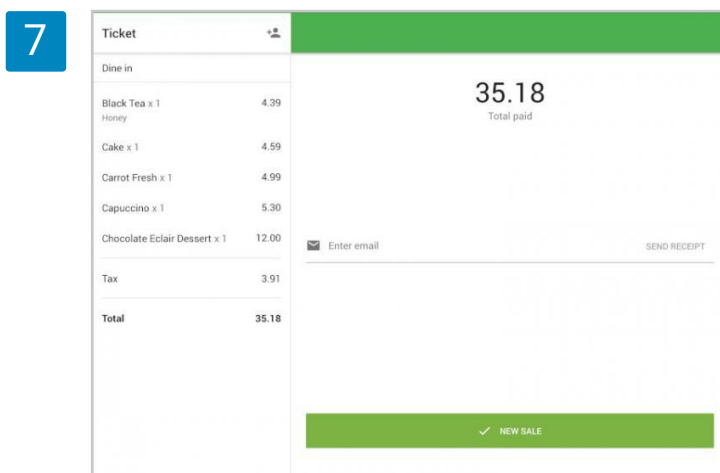
Ticket		← Remaining 35.18	
Dine in		<div> <div>−</div> <div>2</div> <div>+</div> </div> <div>Payments</div>	
Black Tea x 1 Honey	4.39		
Cake x 1	4.59		
Carrot Fresh x 1	4.99		
Capuccino x 1	5.30		
Chocolate Eclair Dessert x 1	12.00		

<div> <div>🗑️</div> <div>Card</div> <div>▼</div> </div>	<div> <div>25.00</div> <div>CHARGE</div> </div>
<div> <div>🗑️</div> <div>Cash</div> <div>▼</div> </div>	<div> <div>10.18</div> <div>CHARGE</div> </div>

If you need, enter a custom amount for each partial payment and accept the payments by tapping the 'Charge' button.



After charging, you can see that each payment has the word 'Paid' next to it. Then tap 'Done' to finalize the transaction.

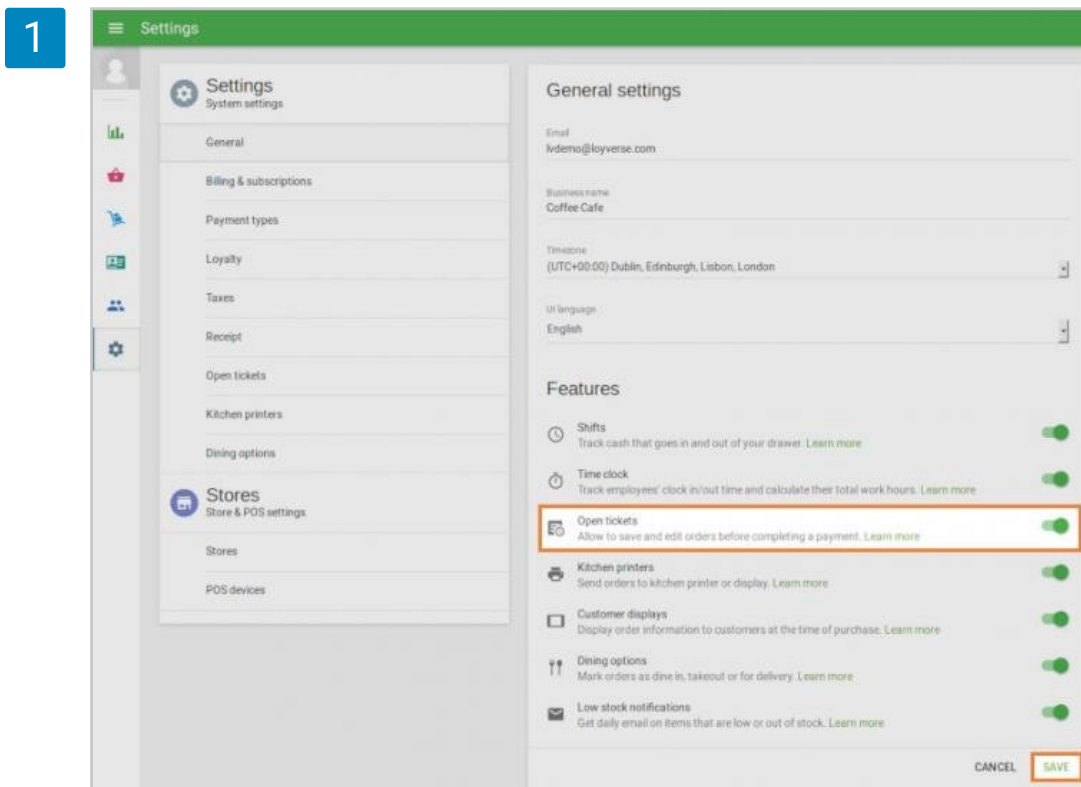


You will also get separate receipts for each payment. Tap the 'New sale' button to go to the sell screen.

2.9 Open Tickets

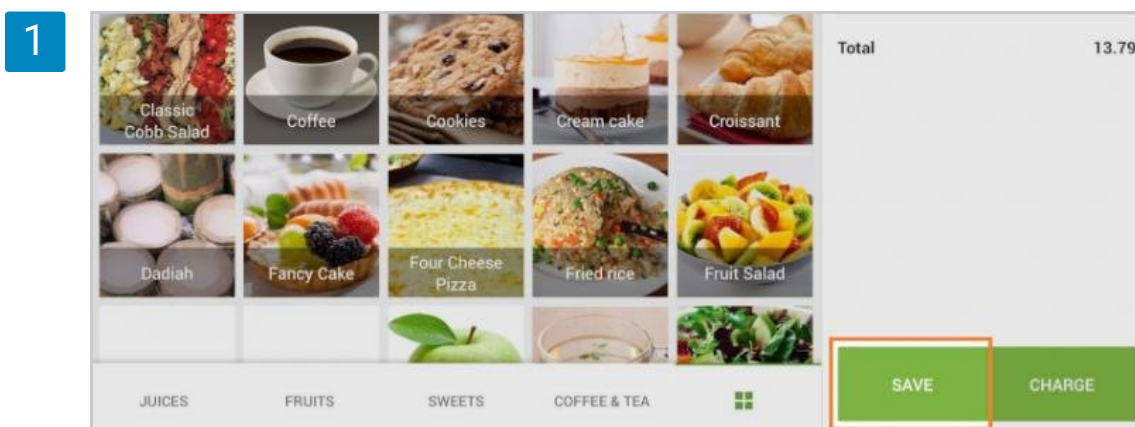
'Open tickets' allow you to create, edit, and save an order, before completing a sale. This feature is usually used in cafes and restaurants, where the order and payment may be separate over an extended period of time. 'Open tickets' helps you to work with few orders simultaneously, edit, and close them during payment.

2.9.1 Settings



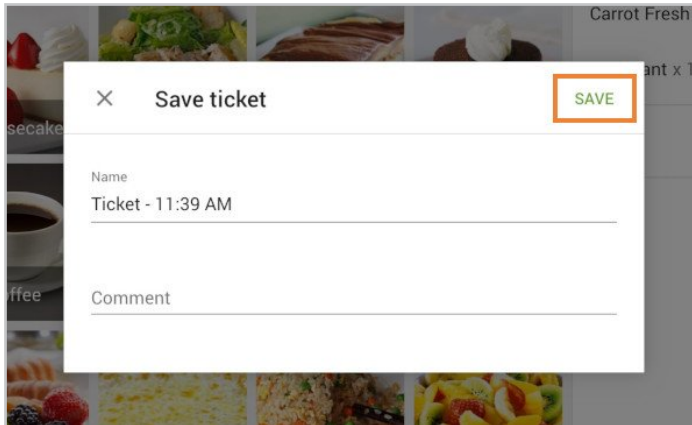
In the Back Office, go to the 'Settings' section and activate the mode 'Open tickets'. Do not forget to save your changes.

2.9.2 Open Ticket Creation



Once you have formed a ticket when selling through the mobile application, click on the 'Save' button.

2

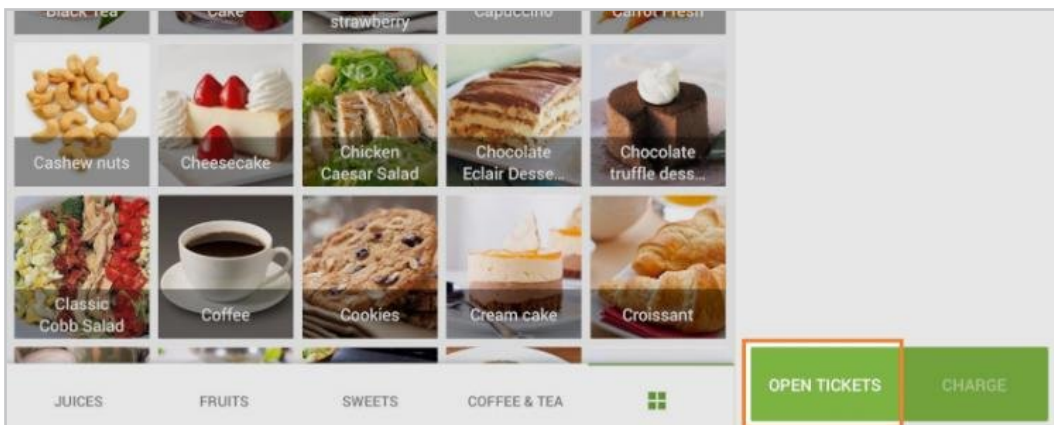


In the opened window, you can edit the name of the ticket (it will be generated automatically with reference to the current time) and add a comment to it. Click the 'Save' button to save the ticket.

If you have the predefined ticket functionality on, you have to select one from the predefined ticket list.

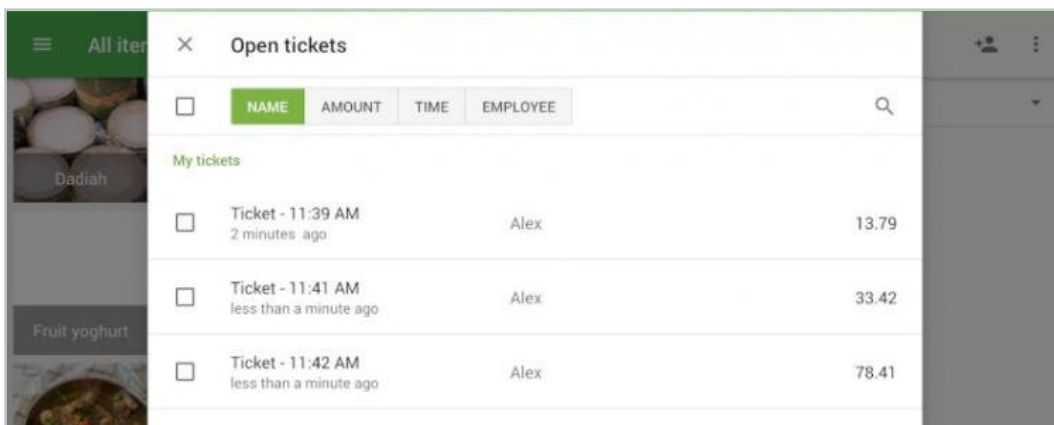
2.9.3 Searching and Editing

1



To edit or close the open ticket, click on the button 'Open tickets'.

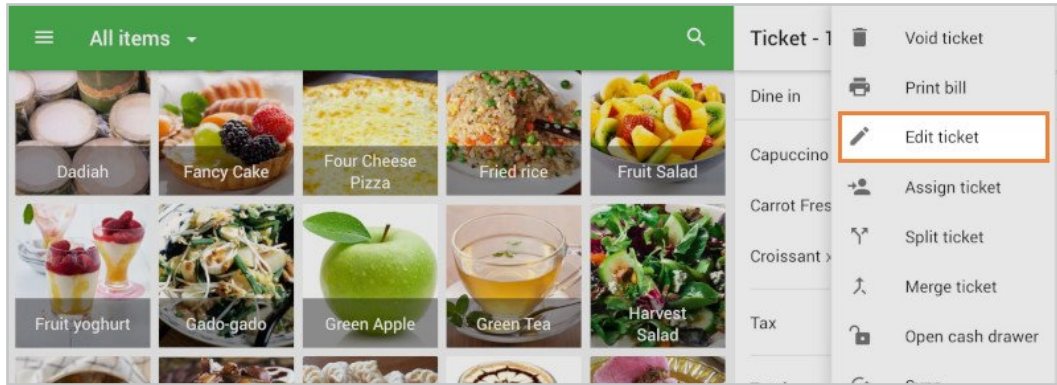
2



In this menu, you will find the open tickets list, which can be sorted by name, amount, last modification time, and employees. If the ticket list is long, use the search bar.

To edit or close the ticket, find it in the list and click on it. Edit or close the ticket, then click 'Save' or 'Charge'.

3

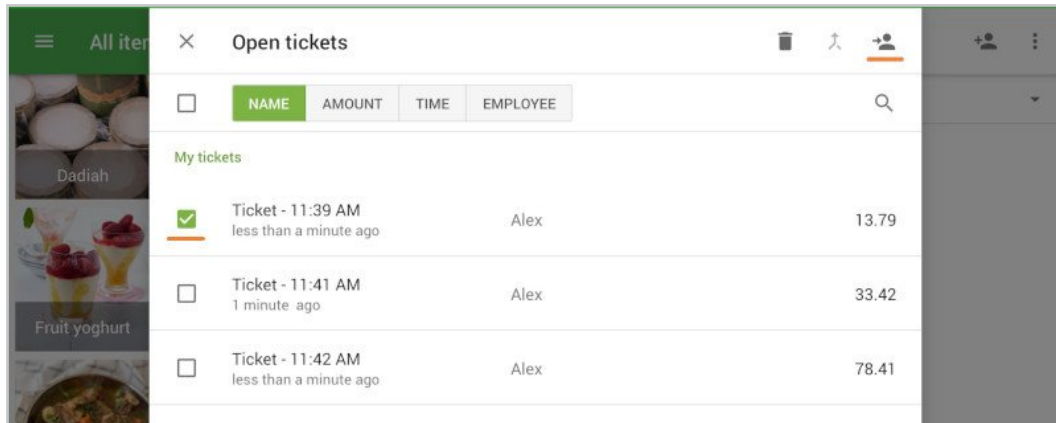


If you need to edit the name of the ticket or the comment attached to it, tap 'Edit ticket' in the three-dot menu.

2.9.4 Assigning and Removal

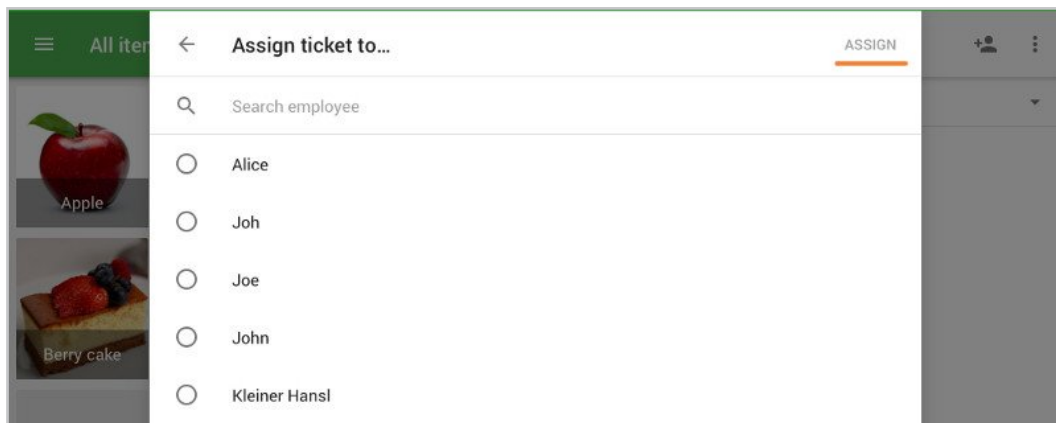
Employees whose 'Manage all open tickets' function is enabled can assign their tickets to each other.

1



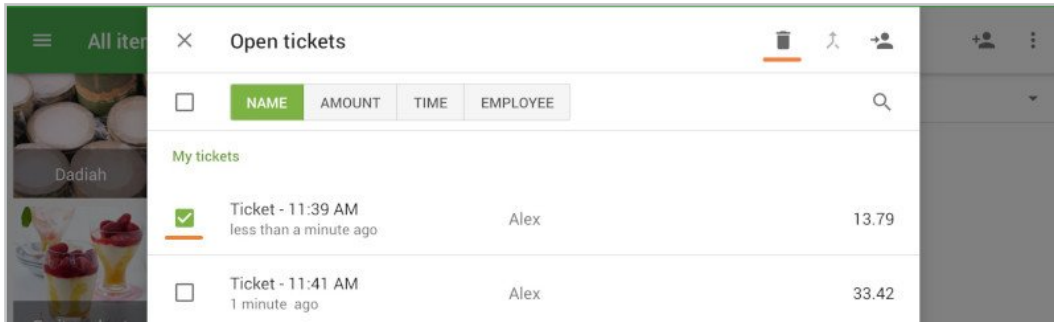
In the open ticket list, check the necessary tickets and tap the icon at the upper right-hand corner of the screen.

2



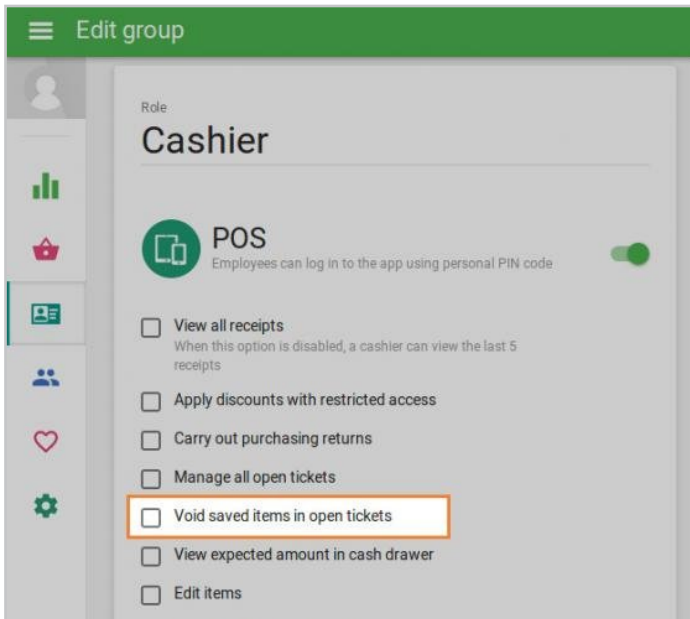
Through search, choose the employee and click the 'Assign' button.

3



To remove the ticket, select it and click the trash can icon.

4



If you want to forbid your cashiers from deleting saved open tickets or deleting items from them, you can restrict their access rights.

To do this, go to the 'Access rights' menu in the Back Office and open the 'Cashier' user group for editing. Deselect 'Void saved items in open tickets' option.

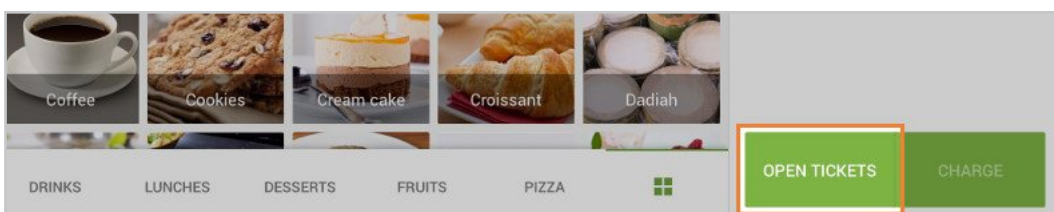
Don't forget to save changes.

2.10 How to Merge Open Tickets with Loyverse POS

Merging tickets allow the cashier to combine items into one ticket. Please make sure that the open ticket option is activated in the Back Office.

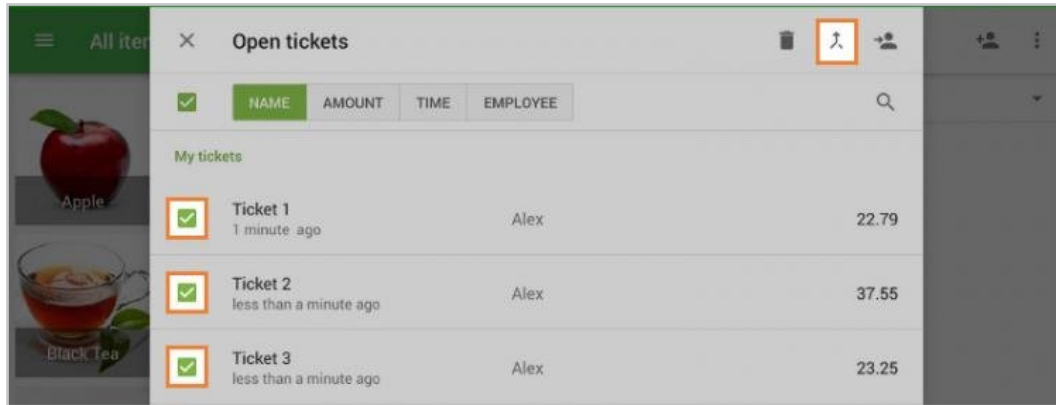
2.10.1 Merging Tickets in the Open Tickets List

1



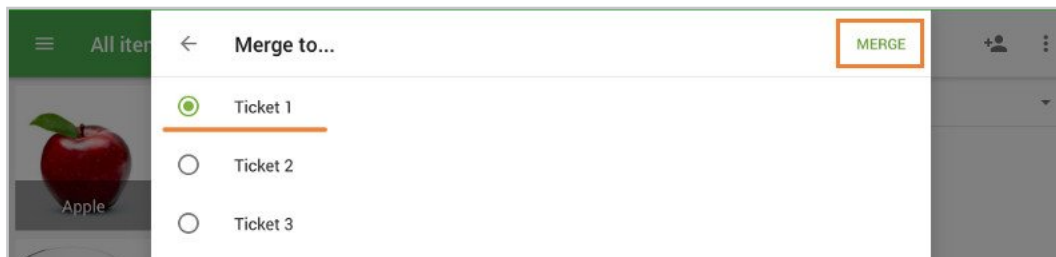
Go to open tickets list from the sale screen by clicking 'Open tickets'.

2



Mark the checkbox of the tickets you would like to merge, and then select the 'Merge' icon at the top right-hand corner.

3

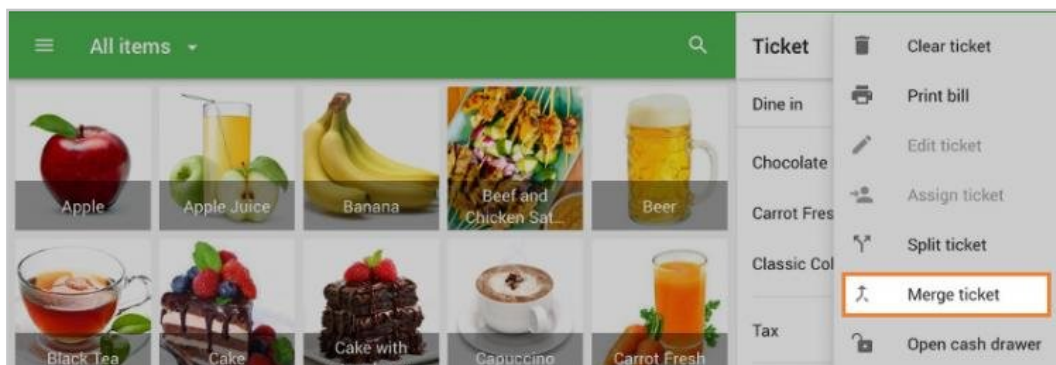


Select a name for the merged ticket and tap the 'Merge' button to save.

2.10.2 Merging Tickets in the Sale Screen

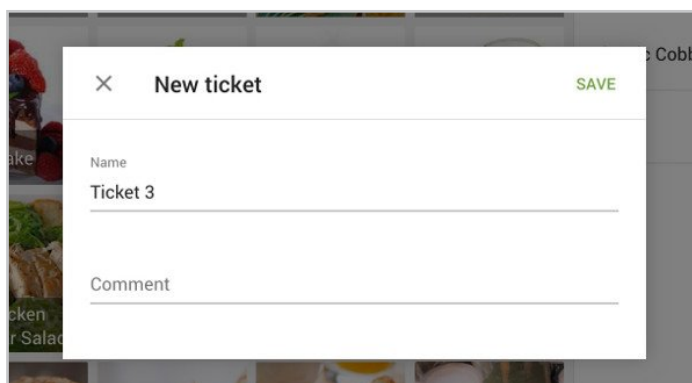
You can merge open ticket directly from the sale screen.

1



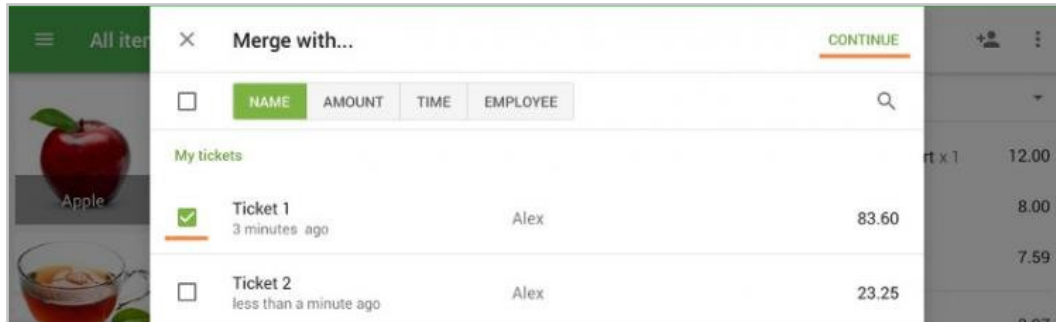
Tap the 'Merge ticket' button by tapping the three dots.

2



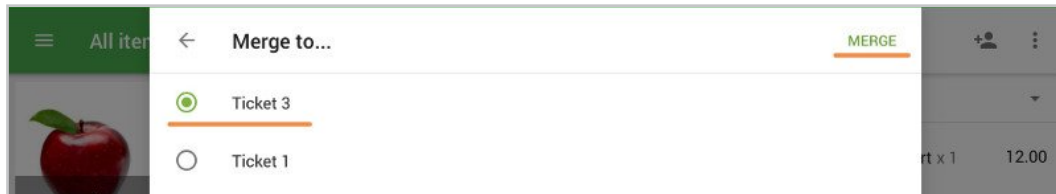
In the open window, you can edit the name and comment on the ticket. Tap 'Save' to go to the next step.

3



Select the ticket(s) you would like to merge your ticket with, and press 'Continue' at the top right-hand corner.

4

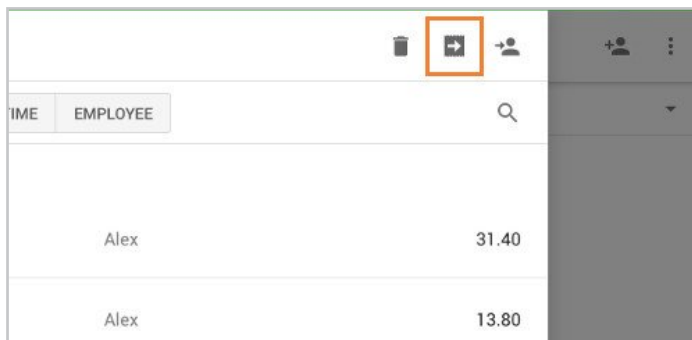


Select a name for the merged ticket and tap 'Merge' to save. Now you can find your new ticket in the open ticket list.

Note

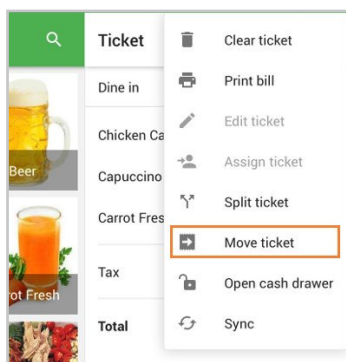
- All modifiers, comments, discounts, and taxes applied to separate items will move to the merged ticket together with their items.
- 'Percentage' and 'Amount' discounts applied to whole tickets will be applied to the merged ticket.

5



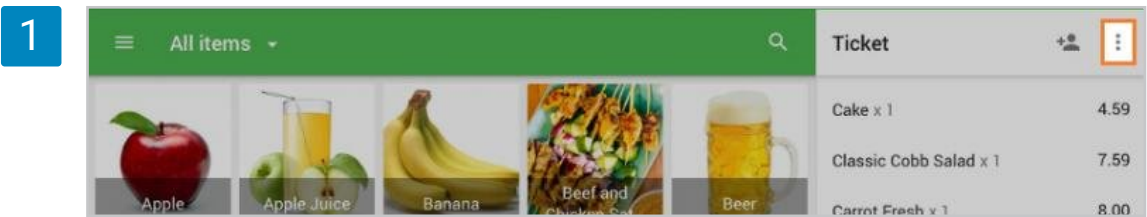
If you have the predefined tickets option on, instead of 'merge ticket', it will say 'Move ticket'. In the same way as merging, you can move your ticket to the other one.

6

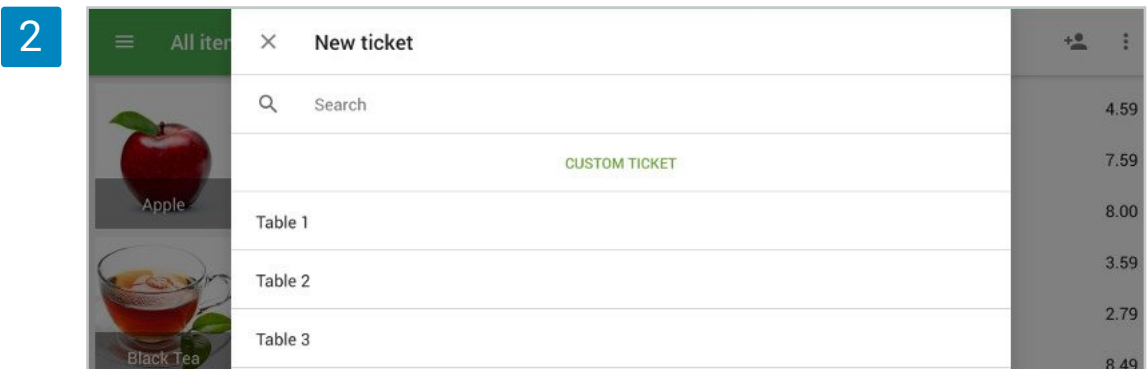
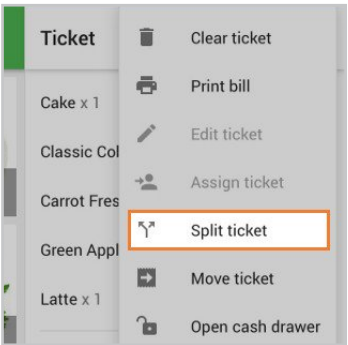


2.11 How to Split an Open Ticket with Loyverse POS

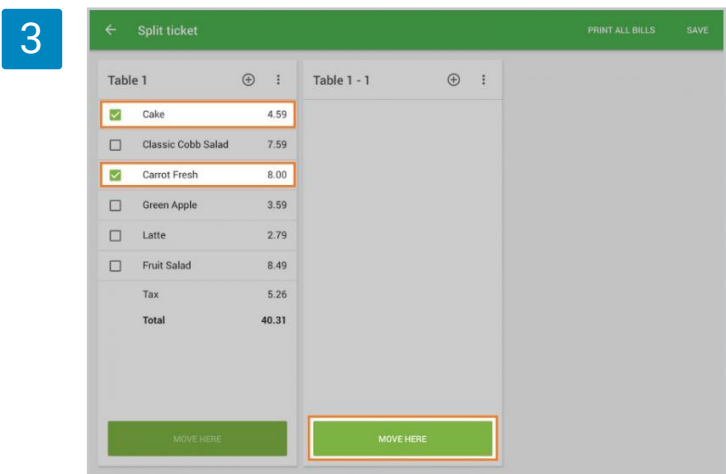
Splitting a ticket allows the cashier to separate its items into multiple new tickets. First, please be sure that the open ticket option is activated in the Back Office.



Once you have an open ticket when selling on the mobile application, click on the 'Split ticket' button by the three dots (:).

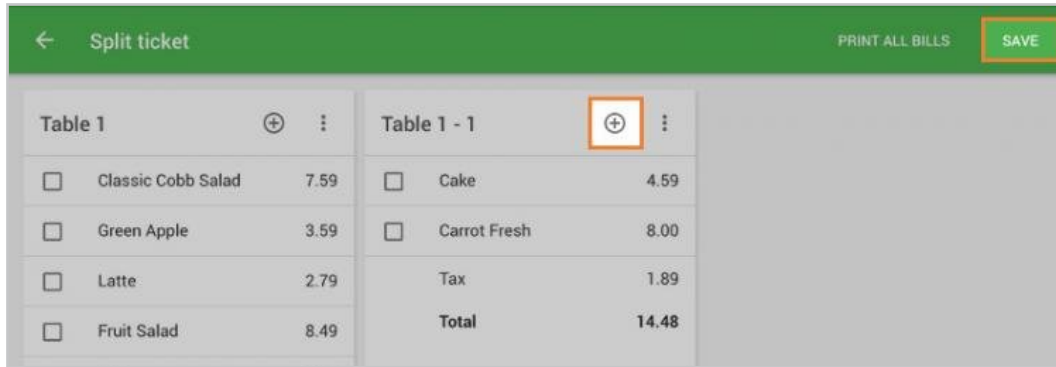


In the opened window, you can set the name for the ticket.



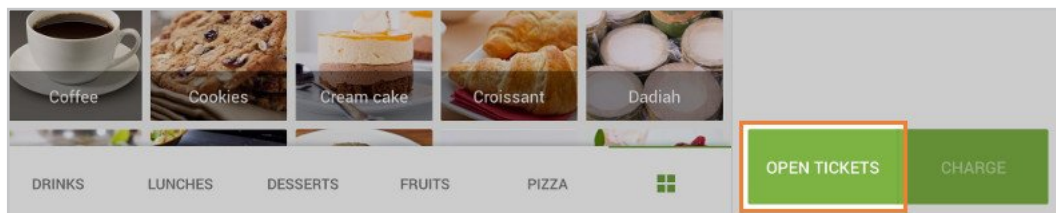
Now you'll see the 'Split ticket' screen with the original ticket on the left side and the new ticket on the right. Tap to select the items that you want to move and click the button 'Move here' on the new ticket.

4



Tap the '+' to add a new additional ticket, if needed. Newly split tickets are ordered numerically (1, 2, 3, etc.). You can create up to 20 tickets. Add items to each new ticket, then press the 'Save' button to save your tickets. Tickets without items will not be saved.

5

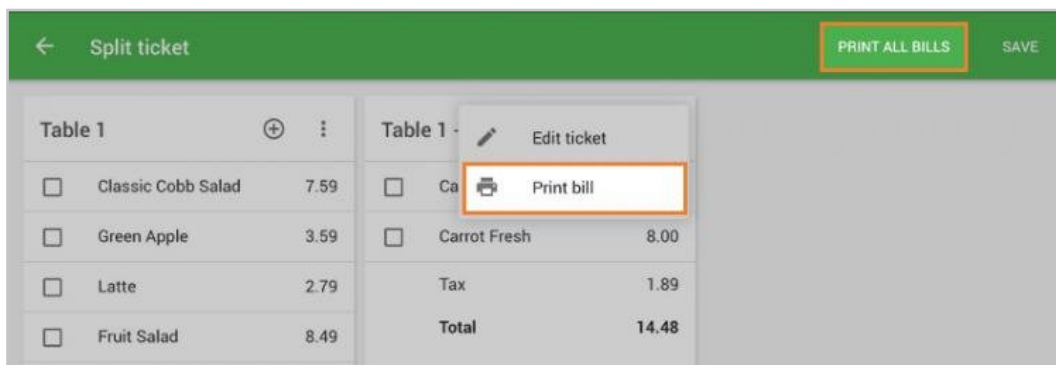


Now you can work with your split open tickets as usual. You can find new open tickets by clicking the 'Open tickets' button on the sale screen.

Note

- All modifiers, comments, discounts, and taxes applied to each individual items will move to another ticket, together with their items.
- 'Percentage' discounts applied to the whole original ticket will be applied to all new tickets. You can move the 'Amount' discounts applied to the whole original ticket to any ticket, in the same way you move items.

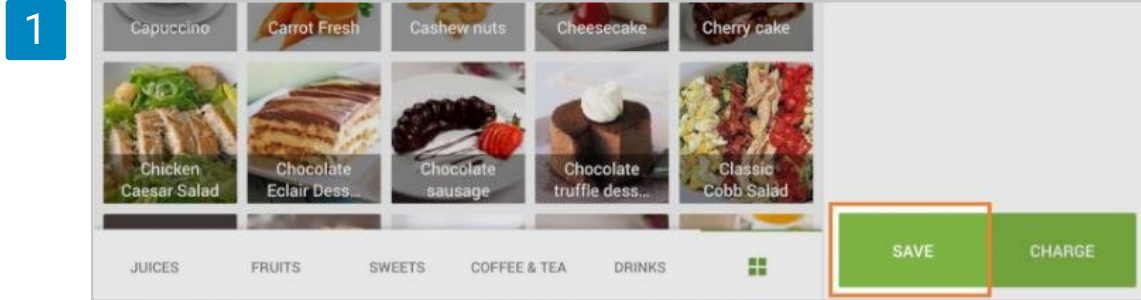
6



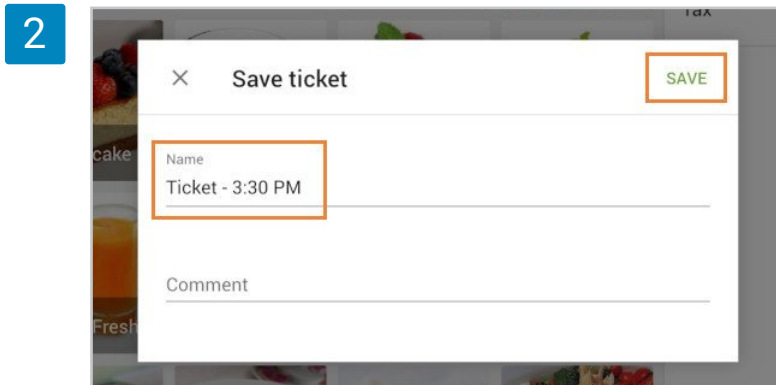
If you have a printer connected, at the 'Split ticket' screen, you can print a bill for each ticket or bills for all tickets.

2.12 Open Tickets Synchronization

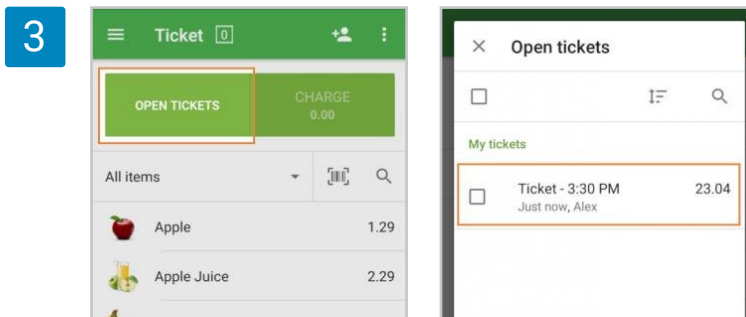
The 'Open tickets' option should be activated in your Back Office.



Add items to the ticket. Tap the 'Save' button to save the open ticket.

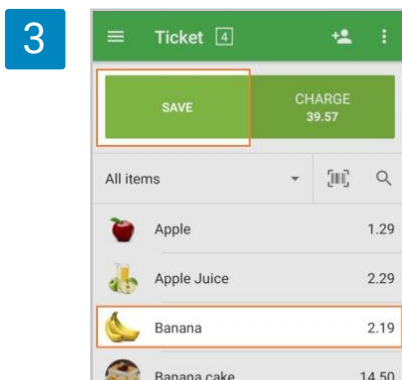


Give your ticket a name or chose a predefined name. And tap 'Save'.

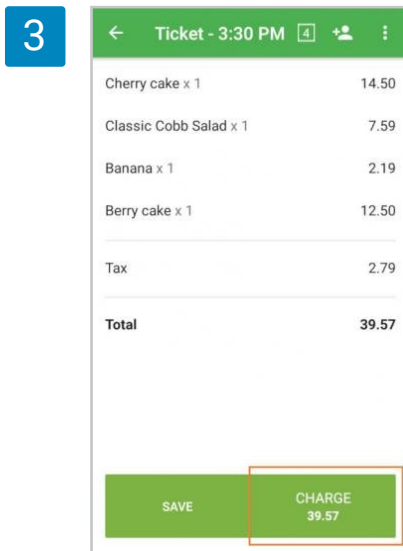


The list of open tickets can be seen on any POS device in the same shop and can be changed or closed.

Open the saved ticket on another device.



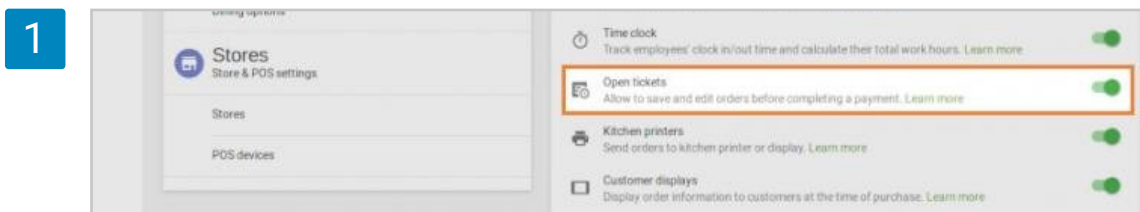
If necessary, you can add other items to the ticket.



Click on 'Charge' to complete the sale.

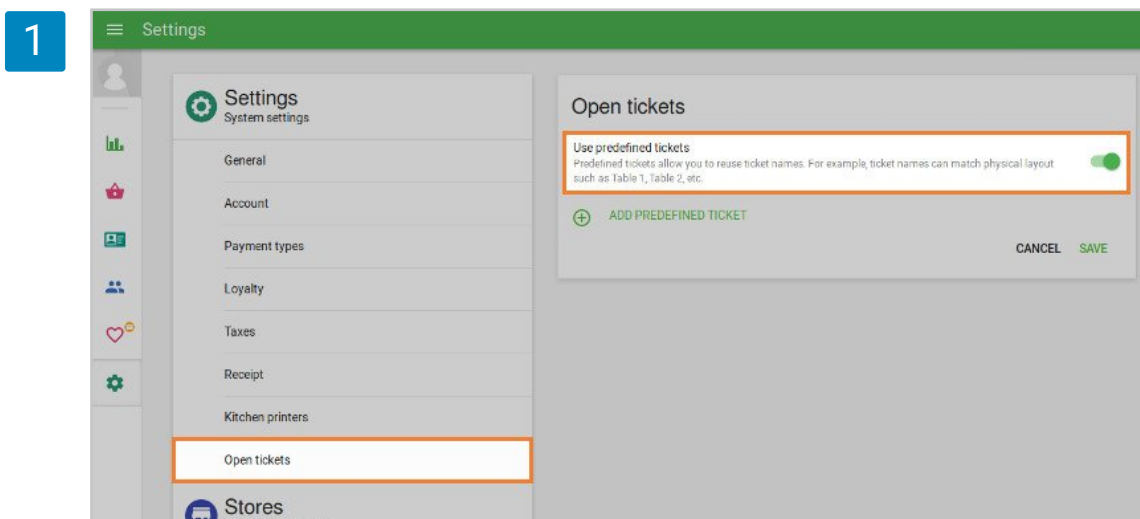
2.13 How to Use Predefined Open Tickets to Name Tables

This feature allows you to quickly assign names to open tickets. For example, Table 1, Table 2, etc.



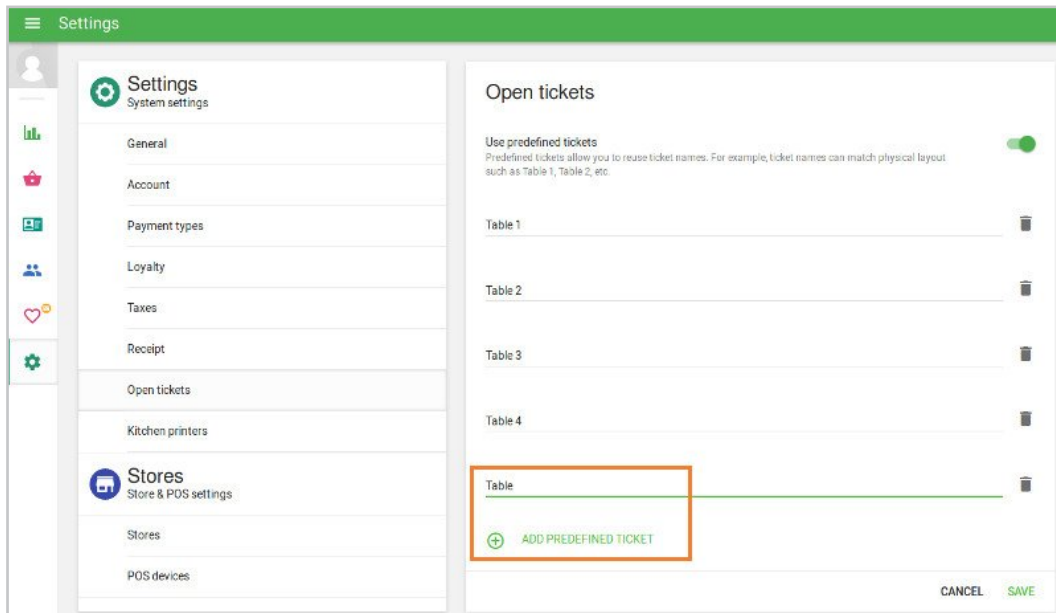
Please be sure that the open ticket option is activated in the Back Office.

2.13.1 Configuration



Please be sure that the open ticket option is activated in the Back Office.

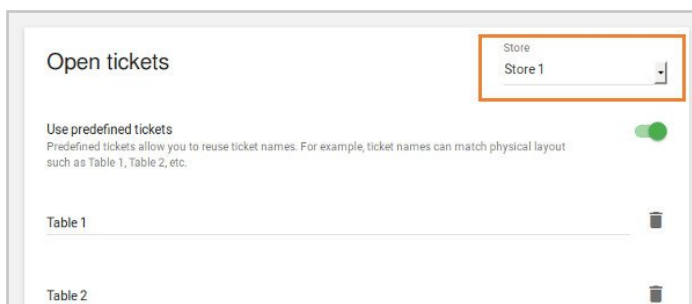
2



You can create a new open ticket by clicking on the 'Add predefined ticket' button and name it, for example, Table 1, Table 2, etc.

Don't forget to save changes.

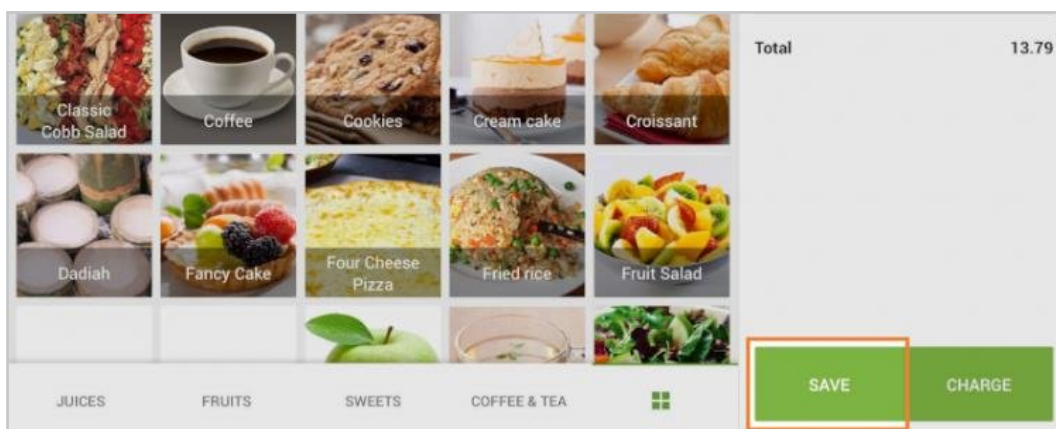
3



If you have multiple stores, you can make a separate set of tickets for each one. To do this, choose the store from the drop-down list.

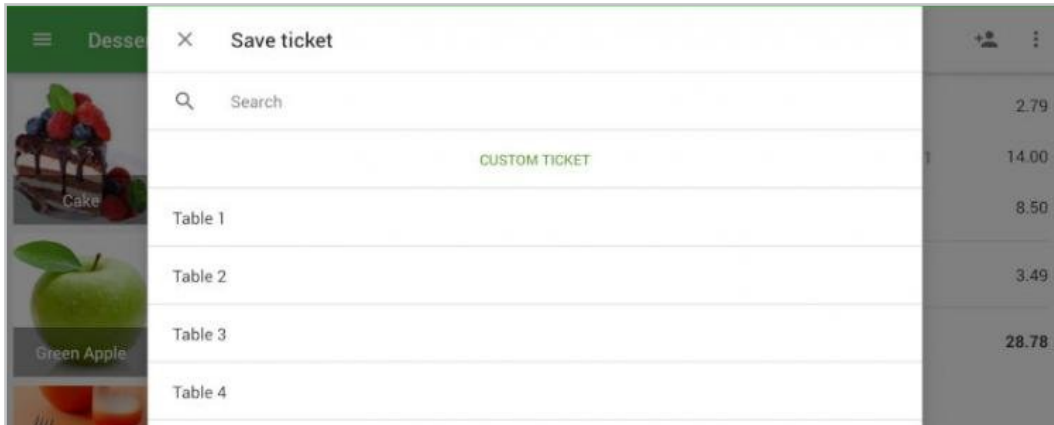
2.13.2 Creating Open Tickets

1



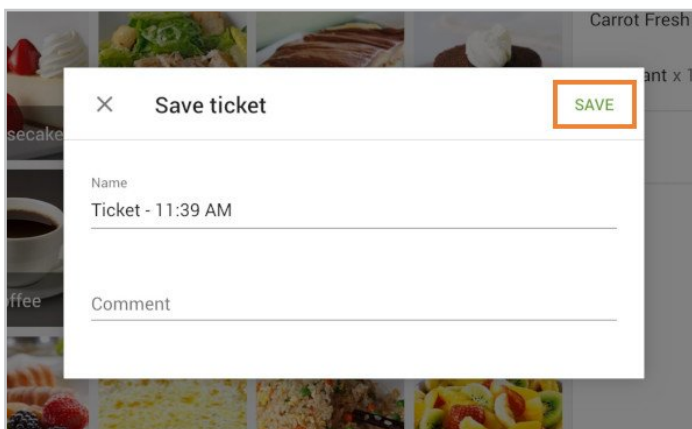
During sales, in the Loyverse POS app, when your ticket is formed, click on the 'Save' button.

2



On the next screen, you will see the list of predefined ticket names. If you choose one, the ticket will be saved with the chosen name. The list does not show already occupied predefined tickets.

3



You can also choose 'Custom ticket' instead of predefined one; just fill in its Name and Comment fields and tap 'Save'.

2.13.3 Searching and Editing

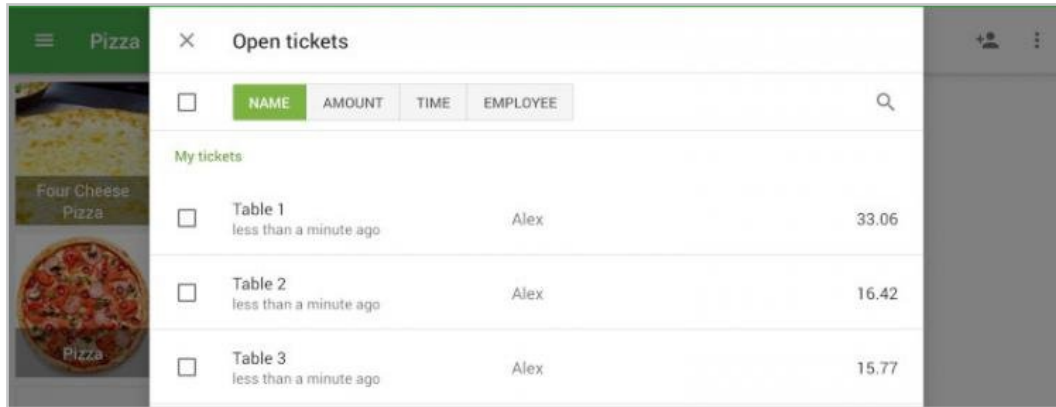
You can edit, split, or move saved predefined open tickets.

1



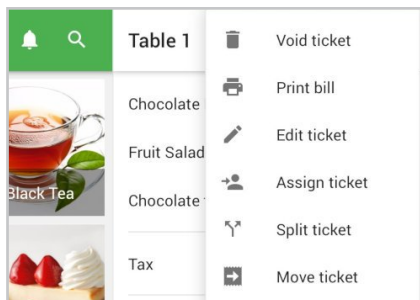
Click on the button 'Open tickets' to access the list of active open tickets.

2



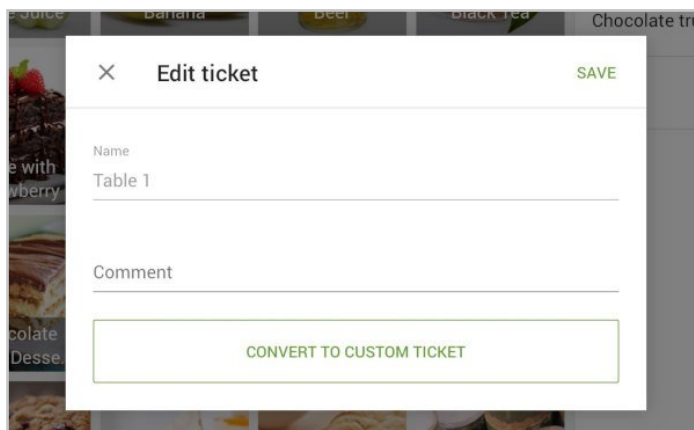
Tap the ticket from the list to edit.

3



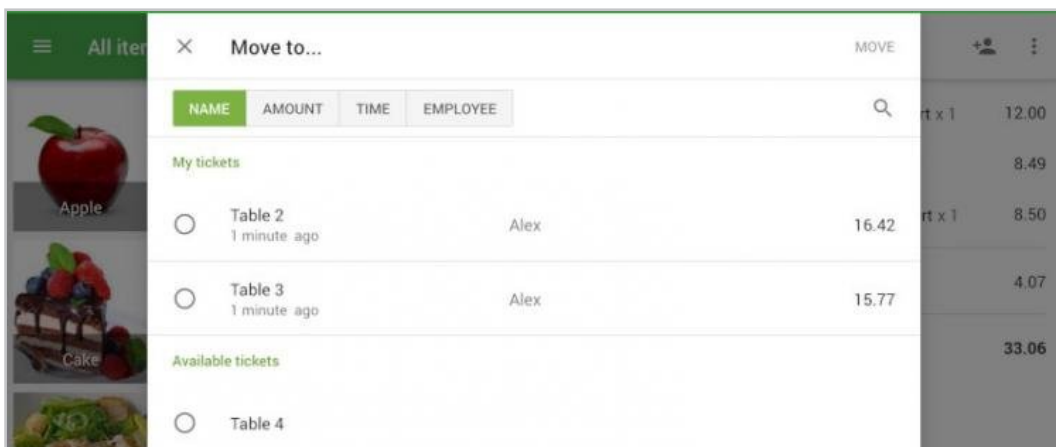
In the three-dot menu, you can choose edit, split, or move ticket.

4



By editing, you can add or change the comment to the ticket or convert it to a custom one.

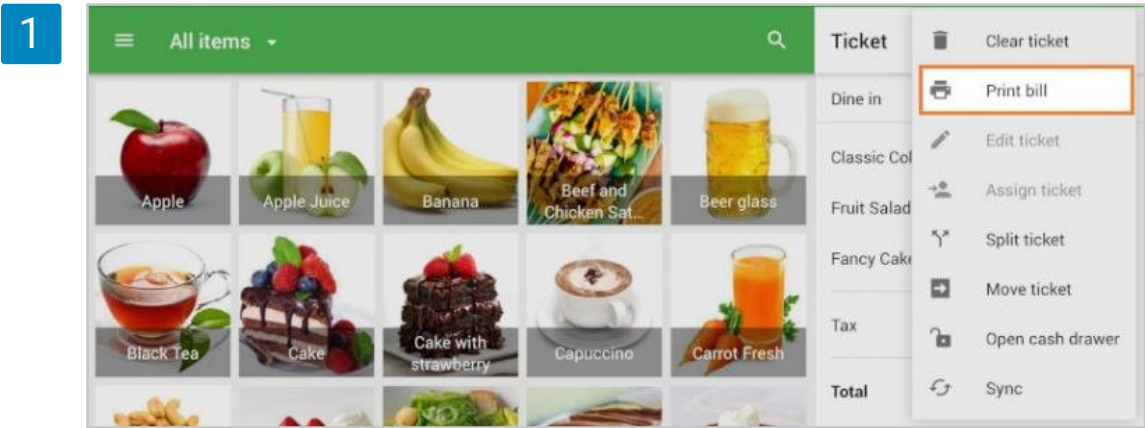
5



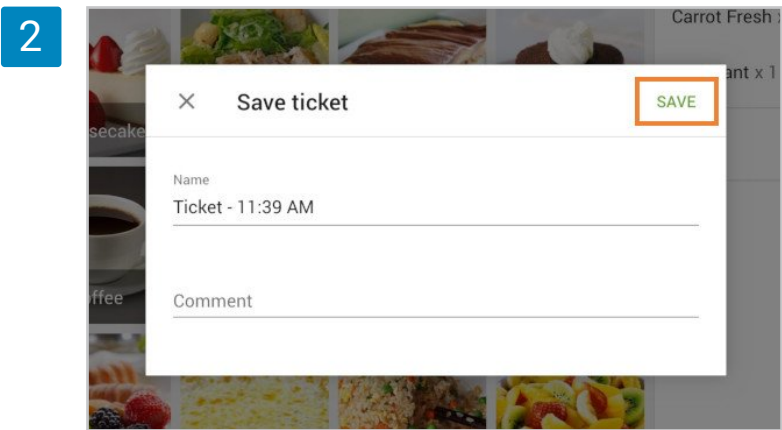
Splitting predefined tickets works the same as regular open tickets. But instead of merging ticket, predefined tickets has the 'Move ticket' option. You can move your ticket to other predefined or a custom one. Choose your destination ticket and tap 'OK'.

2.14 How to Print Bill

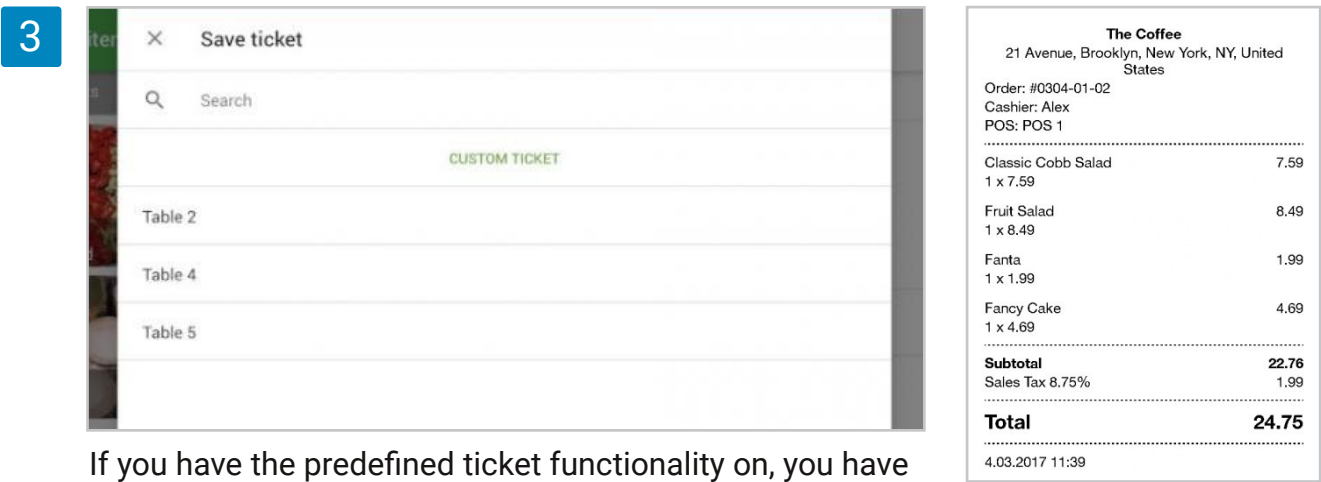
The bill printing option works when the 'Open tickets' function is activated in the General Settings in the Back Office. Also make sure the receipt printer is paired with your Loyverse POS.



While selling on the mobile application, once you have formed a ticket, in the top right corner, press the three dots and select the 'Print bill' button from the drop-down menu.



The system will allow you to edit the name of the ticket and add a comment. The bill will be printed after you tap the 'Save' button.

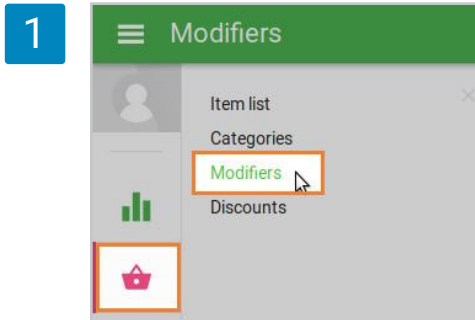


If you have the predefined ticket functionality on, you have to select one from the predefined ticket list. After this, the ticket will be saved with the chosen name, and the bill will be printed.

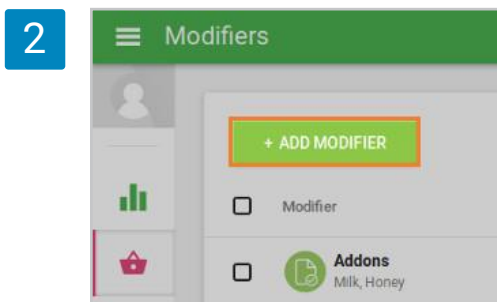
2.15 How to Set Up and Apply Modifiers

The modifier is a set of options that can be applied to the items. They help to sell the same item with different options, such as fillings or toppings. With proper application, modifiers will simplify and accelerate the sales process, as well as provide information about which options are most often selected by clients.

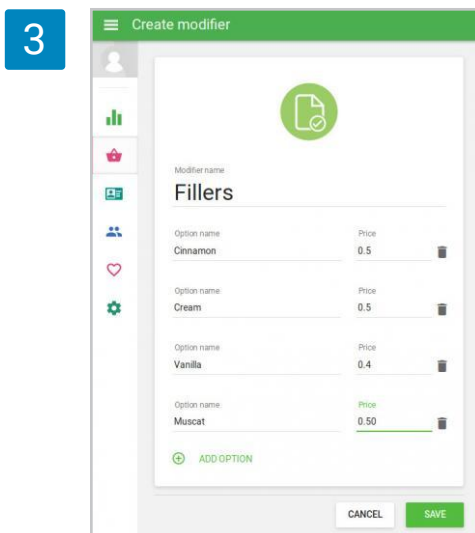
2.15.1 Creation and Set-up of Modifier



In the Back Office at 'Items' menu, click on 'Modifiers'.

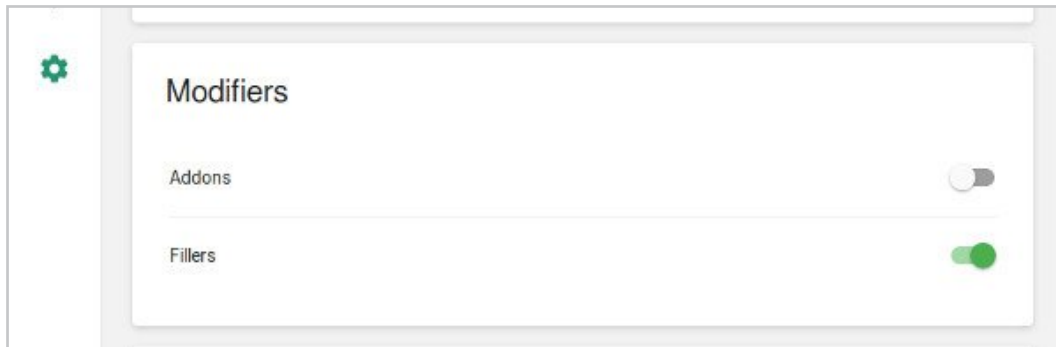


To create a modifier, click '+ Add modifier' button.



In the 'Create modifier' form, enter the modifier name. Then fill in the 'Option name' and 'Price' fields. During a sale, the price of the applied option will be added to the item's price. To create more options, click 'Add option'.

4

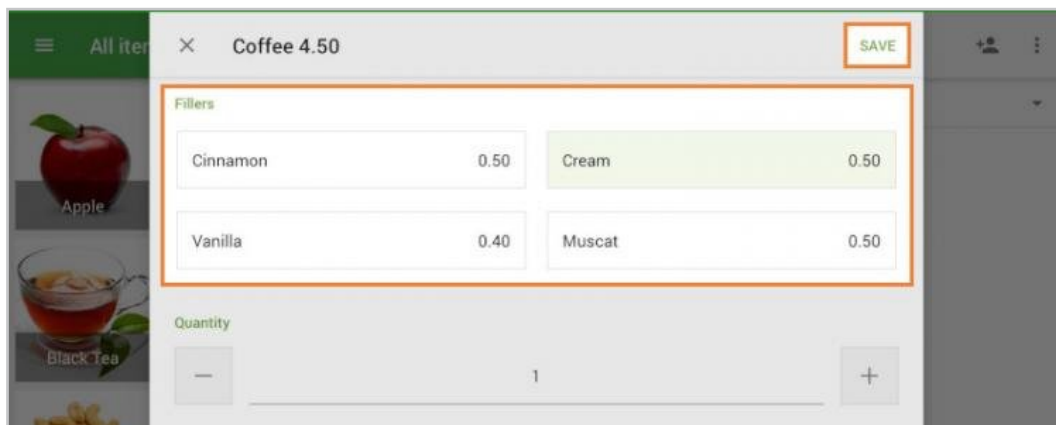


Now you have to assign modifiers to each item.

In the Back Office, go to the 'Item list' and open the necessary item to edit. Find the Modifiers section. Activate those modifiers which you want to apply to this item when selling.

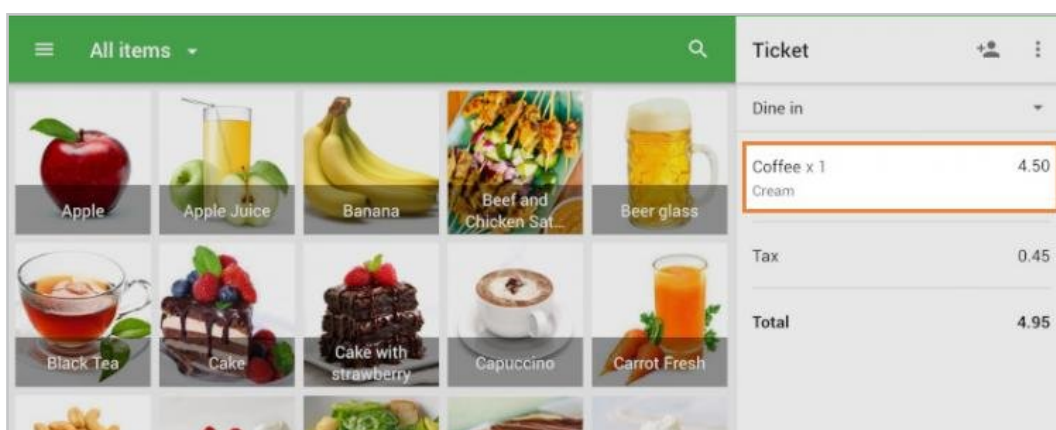
2.15.2 Sales and Reports

1



Click on the button 'Open tickets' to access the list of active open tickets.

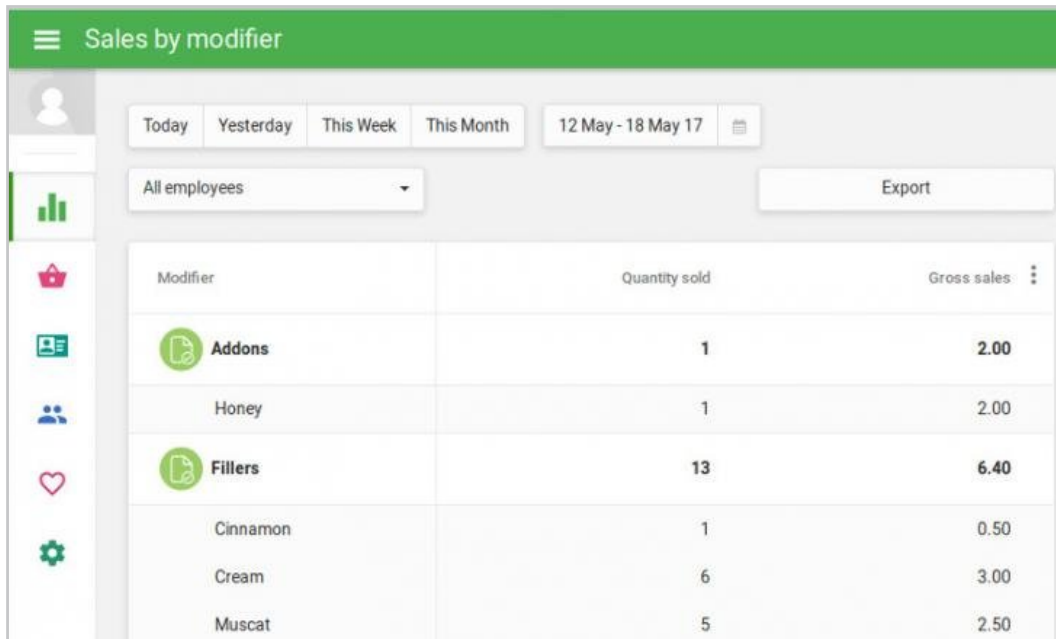
2



An item with the selected options will appear on the ticket.

Then continue all the same steps as in usual checkout process. Taxes and discounts on the goods are already calculated taking into account the modifiers added to them.

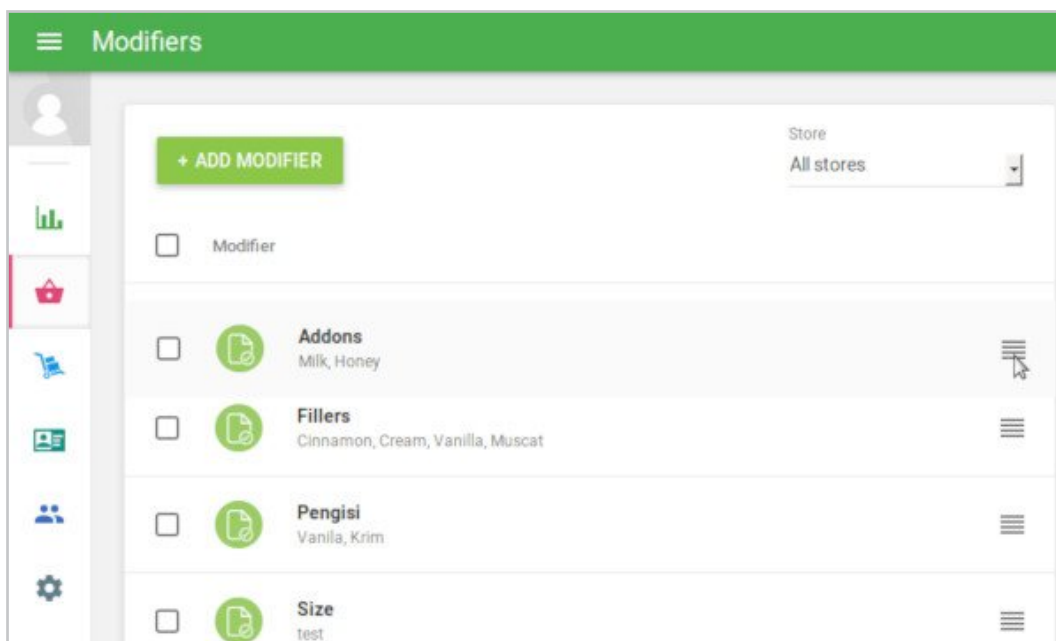
3



Modifier	Quantity sold	Gross sales
Addons	1	2.00
Honey	1	2.00
Fillers	13	6.40
Cinnamon	1	0.50
Cream	6	3.00
Muscat	5	2.50

Modifiers do not have 'Track stock' option, but you can check the consumption of modifiers in the Report section. Reports about modifiers can be found in the Back Office at the 'Reports' menu and 'Sales by modifier' section.

4



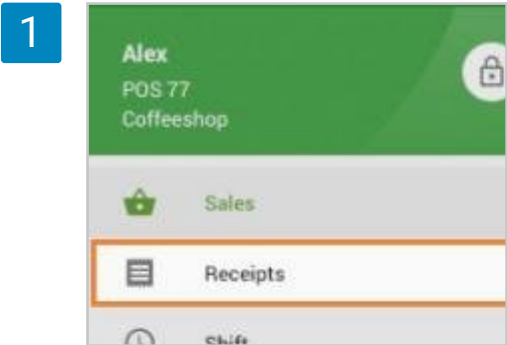
Modifier	Components	Reorder
<input type="checkbox"/> Addons	Milk, Honey	[Four-line pictogram]
<input type="checkbox"/> Fillers	Cinnamon, Cream, Vanilla, Muscat	[Four-line pictogram]
<input type="checkbox"/> Pengisi	Vanilla, Krim	[Four-line pictogram]
<input type="checkbox"/> Size	test	[Four-line pictogram]

You can change the order of modifiers at the sale screen by clicking and dragging the four line pictogram in the Back Office.

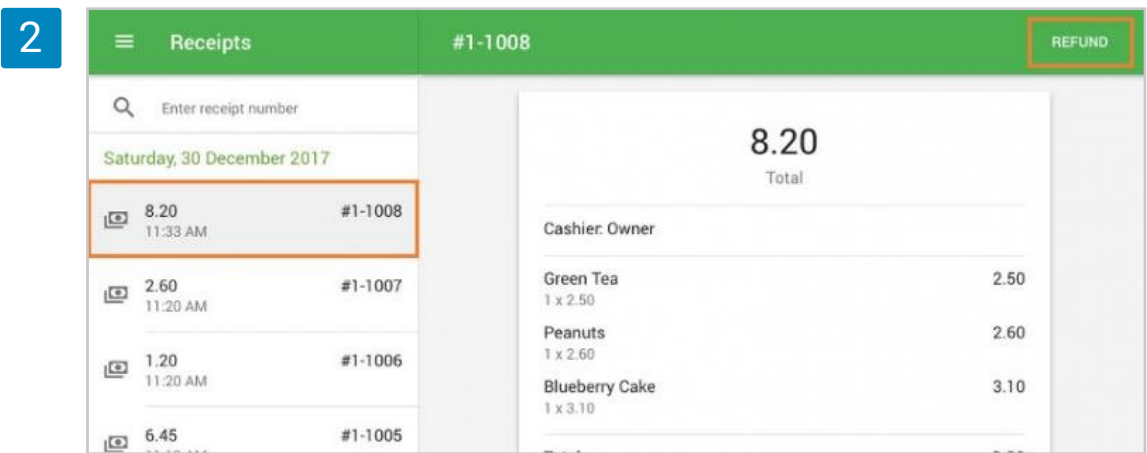
Note

You can change the order of modifiers only when All stores are selected.

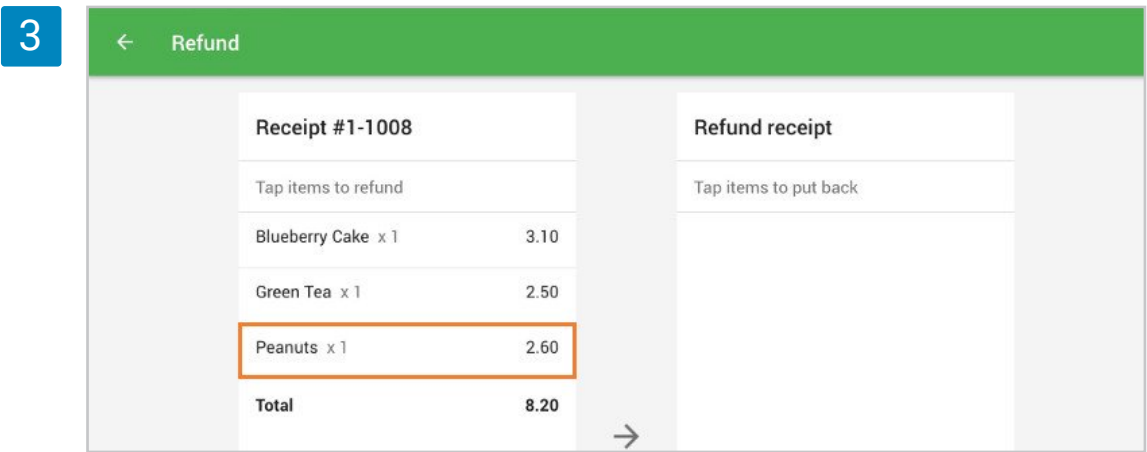
2.16 How to Issue a Refund on Loyverse POS



To issue a refund on the Loyverse POS app, go to the receipts list by tapping the 'Receipts' button in the POS menu.



From the list of receipts, choose the one that needs to be refunded. Then tap the 'Refund' button.



Tap the item to be refunded from the receipt on the left side, and it will appear on the 'Refund receipt' on the right.

4

Then tap the 'Refund' button at the bottom.

3

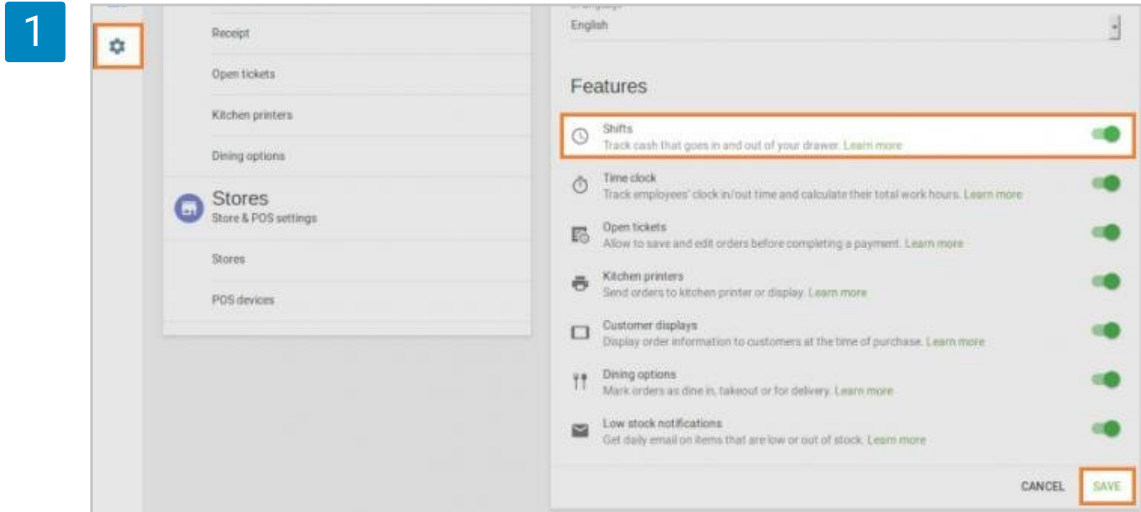
In the receipt list, the refunded receipts will be marked in red text.

Note

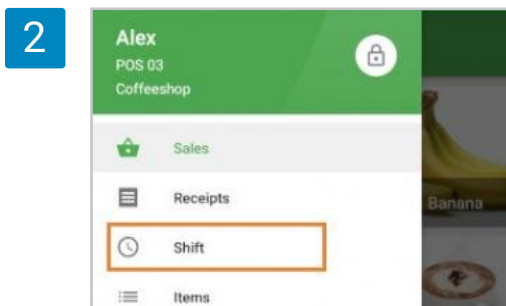
- You can issue a refund only when the device is connected to the Internet.
- The stock of the refunded items will be increased by the quantity that has been refunded.
- You can process a refund of the receipts issued on other POS from the same store.

2.17 Shift Management in Loyverse POS

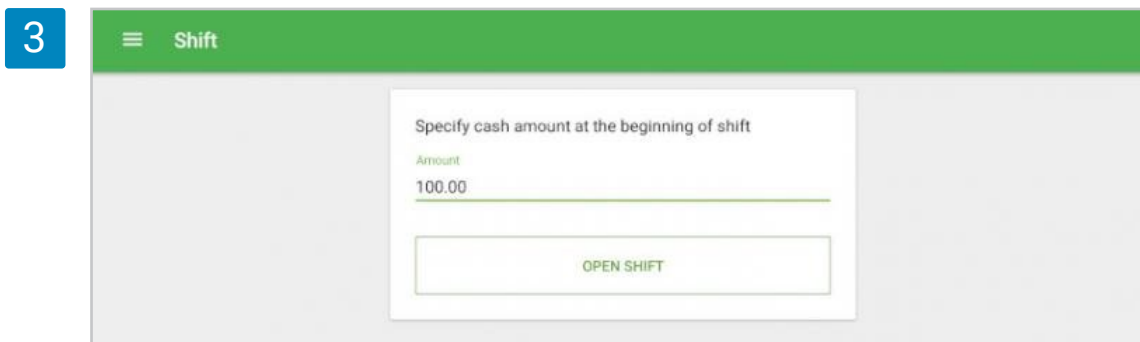
In order to use the 'shifts' feature, log in to your Back Office and go to the Settings.



Switch on 'Shifts' in the General Settings. Click the 'Save' button.



On the Loyverse POS app (Play Market or App Store), go to the 'Shift' menu.



Specify the cash amount at the beginning of the shift and tap the 'Open shift' button.



For cash management during the shift, go to the 'Shift' menu and tap the 'Cash management' button.

5

The screenshot shows the 'Cash management' screen with a green header. Below the header, there is a form with two input fields: 'Amount' and 'Comment'. The 'Amount' field contains the value '1.00'. Below the 'Comment' field, there are two buttons: 'PAY IN' (highlighted with an orange border) and 'PAY OUT' (outlined with a red border).

Let's say we want to pay in one dollar into the cash drawer and later pay out two dollars.

Enter the amount and tap the 'Pay In' button if you put money into the cashier without a purchase.

6

The screenshot shows the 'Cash management' screen with a green header. Below the header, there is a form with two input fields: 'Amount' and 'Comment'. The 'Amount' field contains the value '2.00'. Below the 'Comment' field, there are two buttons: 'PAY IN' (outlined with a green border) and 'PAY OUT' (highlighted with an orange border). At the bottom of the screen, there is a section titled 'Pay in/Pay out' showing a list of transactions. The first transaction is at 11:36 AM by Alex with an amount of 1.00.

Tap the 'Pay Out' button if you want to take money out from the cashier.

7

The screenshot shows the 'Cash management' screen with a green header. Below the header, there is a form with two input fields: 'Amount' and 'Comment'. Below the 'Comment' field, there are two buttons: 'PAY IN' (outlined with a green border) and 'PAY OUT' (outlined with a green border). At the bottom of the screen, there is a section titled 'Pay in/Pay out' showing a list of transactions. The first transaction is at 11:37 AM by Alex with an amount of -2.00. The second transaction is at 11:36 AM by Alex with an amount of 1.00.

For cash management during the shift, go to the 'Shift' menu and tap the 'Cash management' button.

8

The screenshot shows the 'Shift' menu with a green header. Below the header, there are two buttons: 'CASH MANAGEMENT' and 'CLOSE SHIFT'. The 'CLOSE SHIFT' button is highlighted with an orange border. Below the buttons, there is a section for shift details: 'Shift beginning' with the time '9/5/18 11:34 AM' and 'Starting cash' with the amount '100.00'.

At the end of the day when you close the shift, go to the 'Shift' menu and tap the 'Close shift' button.

9

The screenshot shows the 'Close shift' form with a grey header. The form contains the following fields: 'Expected cash amount' (217.00), 'Actual cash amount' (217.00), 'Difference' (0.00), and 'Print report' (toggle switch). The 'CLOSE SHIFT' button is highlighted with an orange border.

You can see a closed shift form. 'Expected amount of cash' is calculated from sales, refunds, and cash paid in/out during the shift. If you enter your 'Actual cash amount', you can see the difference between them. Tap 'Close shift' to finish the shift.

10

The screenshot shows the 'Edit group' screen for the 'Cashier' role. The screen has a green header and a sidebar with icons. The main content area shows the 'POS' role with a toggle switch. Below this, there is a list of permissions: 'View all receipts', 'Apply discounts with restricted access', 'Change taxes in a sale', 'Carry out purchasing returns', 'Manage all open tickets', 'Void saved items in open tickets', 'View shift report', and 'Open cash drawer without making a sale'. The 'View shift report' option is highlighted with an orange border.

If you want to hide the 'Expected cash amount' from your cashiers, you can restrict their access rights. To do this, go to the 'Access rights' menu in the Back Office and open the 'Cashier' user group for editing. Deselect the 'View shift report' option.

Don't forget to save changes.

11

After that, when your cashiers are closing the shift, they can only see the field to enter the 'Actual cash amount'.

2.18 Dining Options

Dining options allow you to note whether customers are dining in, taking their order out, or requesting delivery.

2.18.1 Configuration of Dining Options

1

Login to the back office, navigate to the Settings menu, scroll to General Settings and switch the 'Dining options' slider on.

2

Name	Available	
Dine in	✓	Default dining option
Takeout	✓	
Delivery	✓	

After that in the Settings menu 'Dining options' section appears. There are default presets for three of the most common types of options: 'Dine in', 'Takeout' and 'Delivery'.

3

You can edit these options by clicking on them or create new by clicking on 'Add dining option' button.

4

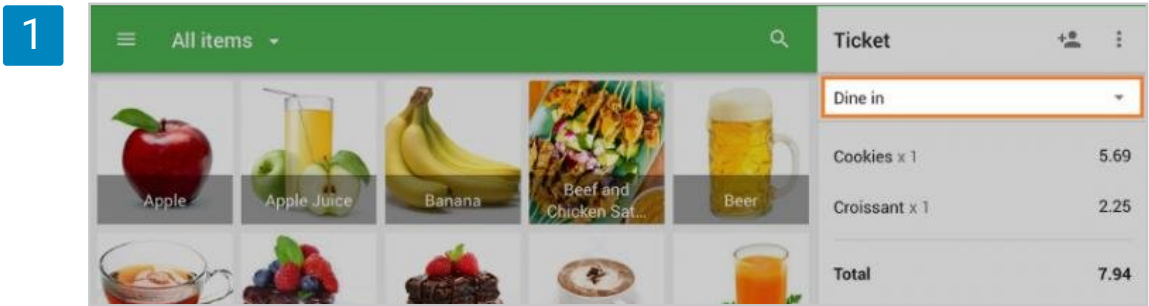
Name	Available	Default dining option
Dine in	<input checked="" type="checkbox"/>	
Takeout	<input checked="" type="checkbox"/>	
Catering	<input checked="" type="checkbox"/>	
Delivery	<input checked="" type="checkbox"/>	

Click and drag four line pictogram to change an order of the options. The first option will be used by default.

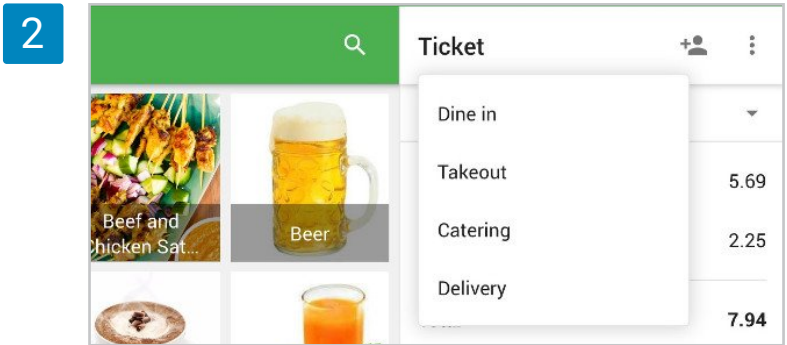
5

If you have multiple stores, you can manage the dining options for each store.

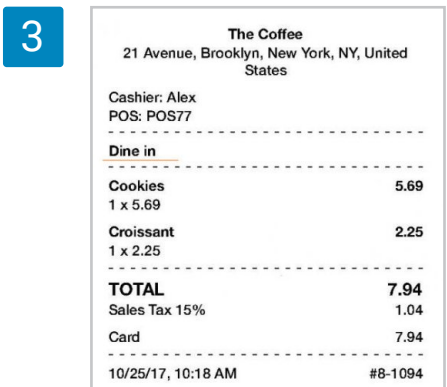
2.18.2 Using Dining Options during Sale



During sales at the ticket, you can see dining options line with the default option.



If you tap on this line, you can see the drop-down menu with all dining options. Choose needed one.



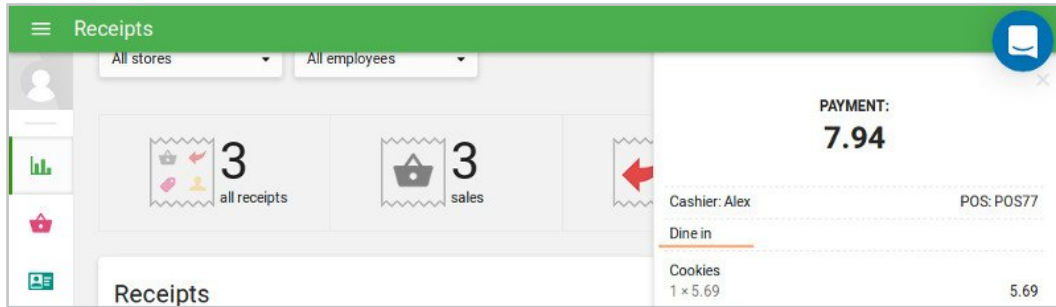
Dining options will be shown on the printed receipt.

As well as at the bill if you print one.



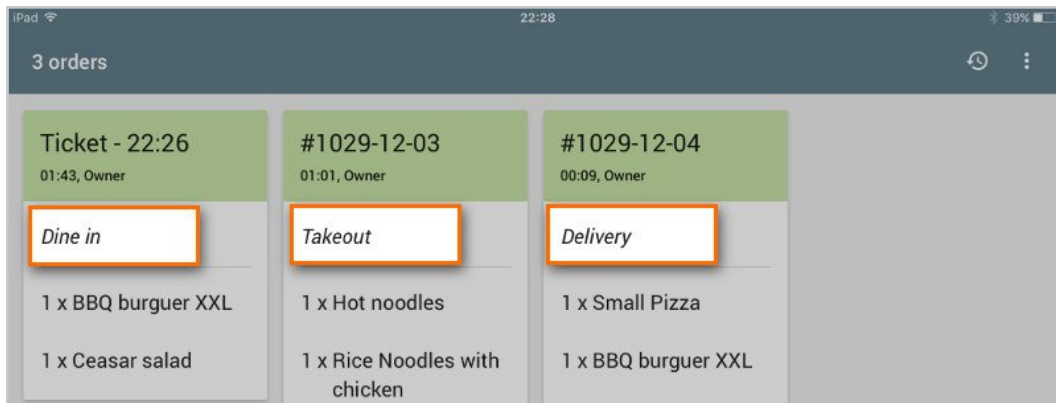
Dining option will be shown in the e-receipt, sent to customers email.

4



You can see dining option line in the receipts information at the back office or Loyverse POS app (Android and iOS).

5



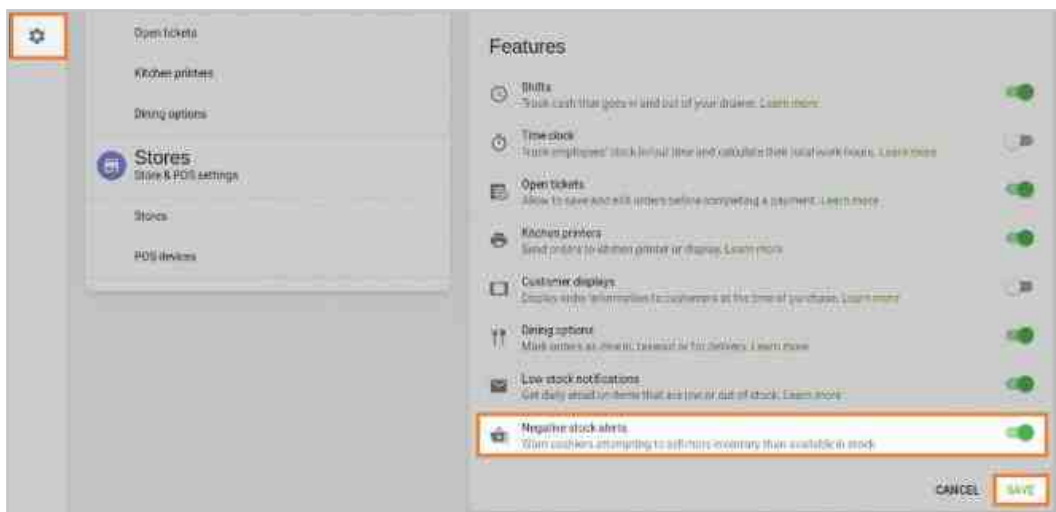
Also, dining option information will appear at the receipts information on CDS and at the tickets when using kitchen printers and KDS.

2.19 Negative Stock Alerts

Negative stock alerts inform the cashier about an insufficient stock of the item when he/she tries to sell more than what is available. It protects you against a negative stock in your inventory.

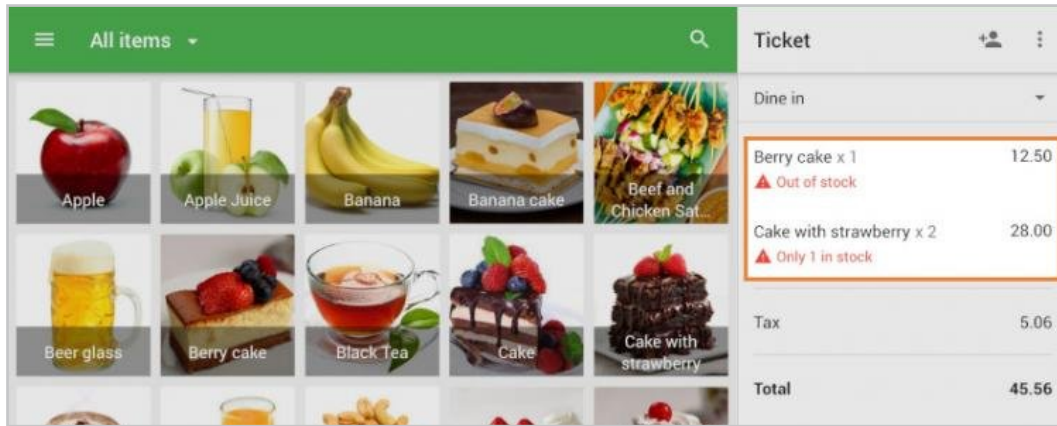
Please be sure that the 'Track stock' option is activated for those items which you want to receive alerts for.

1



In order to use this feature, log in to your Back Office and go to the Settings. Switch on 'Negative stock alerts' in the General Settings. Click the 'Save' button.

2



With this feature enabled, the system will show an alert about insufficient stock when the quantity of an item in the ticket is more than the current quantity in stock. Also, the system will show you the quantity that is available for sale if the stock of this item is more than 0. Alerts work for composite items as well.

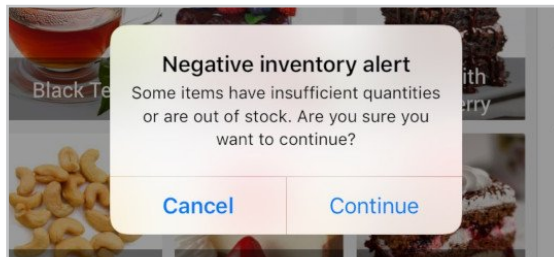
3



The warning is also displayed in the editing dialog of the item added to the ticket.

Cashiers can reduce the quantity of an item in the ticket and tap the Save button if the stock of the item is more than 0.

4



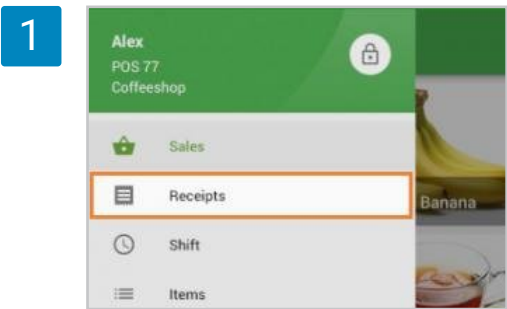
When a cashier taps the Charge button, the system will show a notification one more time.

The cashier can still proceed to sell an item by tapping 'Continue'.

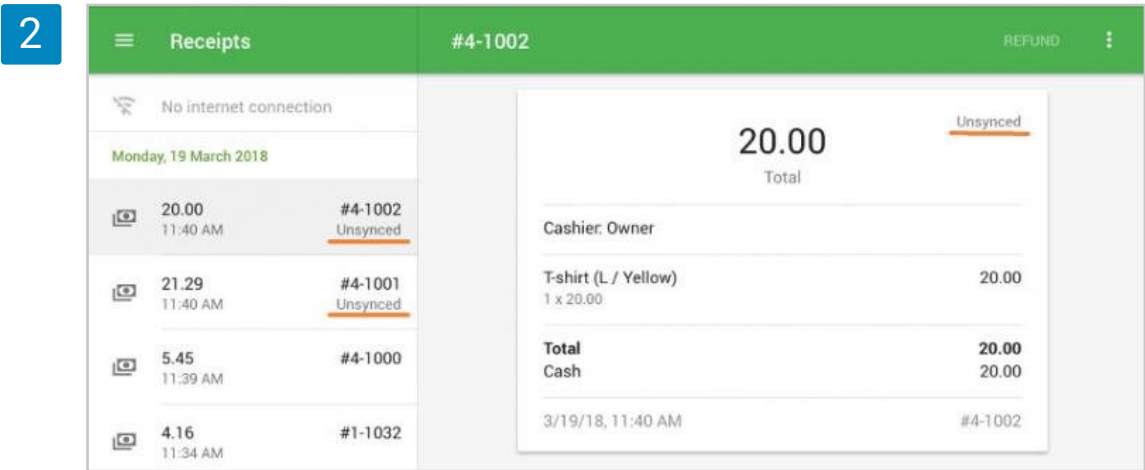
Note

Warnings are displayed only when there is Internet access and are not displayed in offline mode.

2.20 Receipts List in the POS

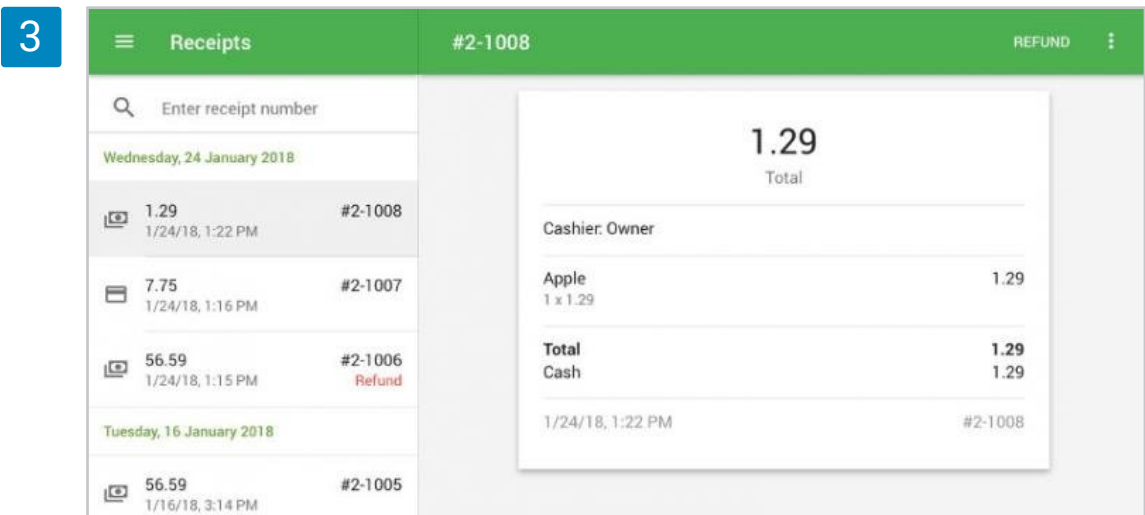


On the Loyverse POS app (Play Market or App Store), go to the 'Shift' menu.



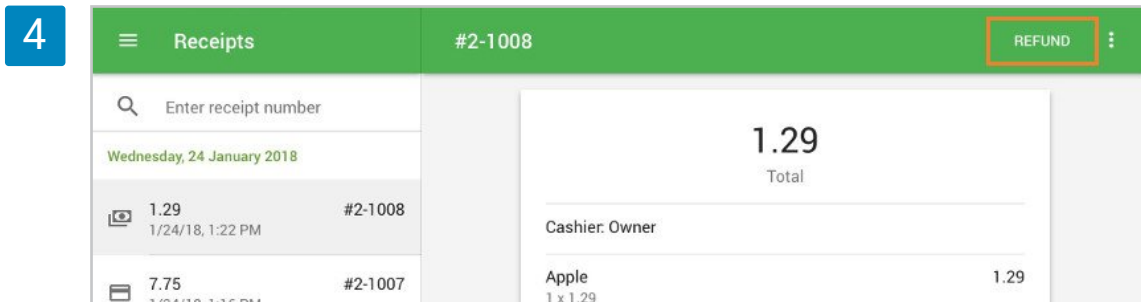
The receipts from all POS of the same store will be displayed in the list. If you want to refresh the receipts list, just swipe it down.

Non-synchronized receipts (that are made during the time when there was no Internet connection) will say 'Unsynced'.

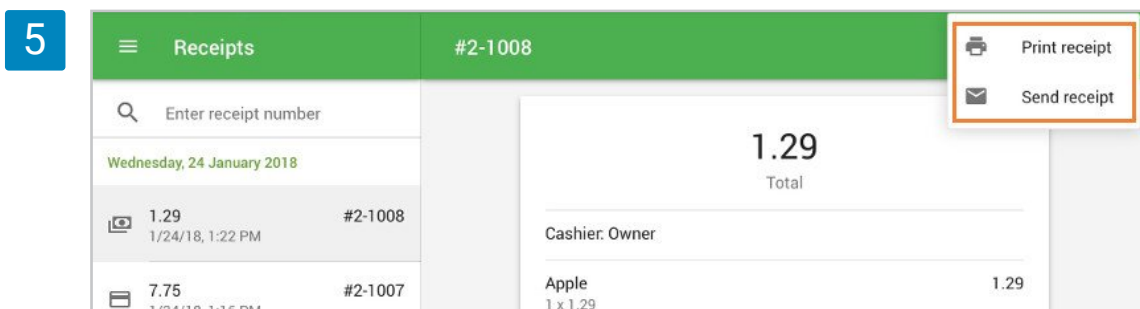


If the employee has been disabled the option 'View all receipts' (access rights in the Back office), he/she can view only the last 5 receipts.

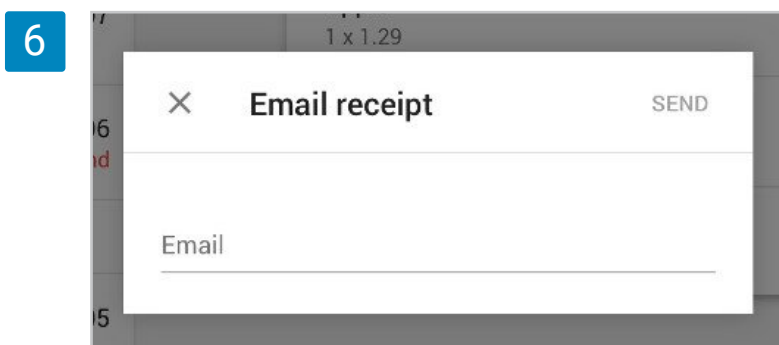
Tap on the receipt in the list to see its details.



To make a refund, tap the 'Refund' button.



There are additional actions you can do with the selected receipt under the three dots menu (:) at the upper right-hand corner: 'Print receipt' (if you have connected the receipt printer) and 'Send receipt' by email.



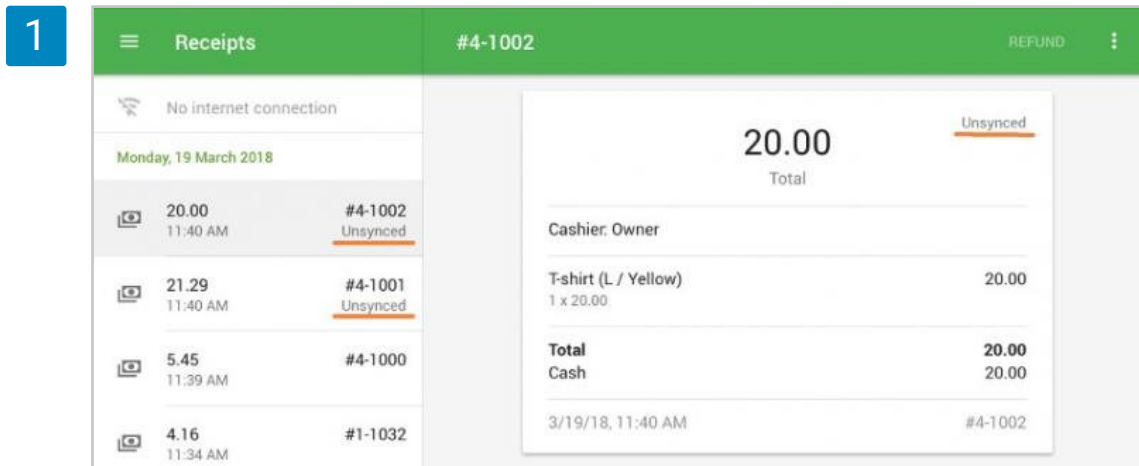
If you choose to 'Send receipt', you have to enter the email of the recipient in the pop-up form and tap 'Send'.

Note

- The system does not allow you to make a refund in the absence of Internet connection. The "Refund" button will be inactive.
- If you email a receipt when the device is offline, it will be sent after the restoration of the Internet connection.
- There will be no search field when you are in offline mode.

2.21 Offline Use of Loyverse POS

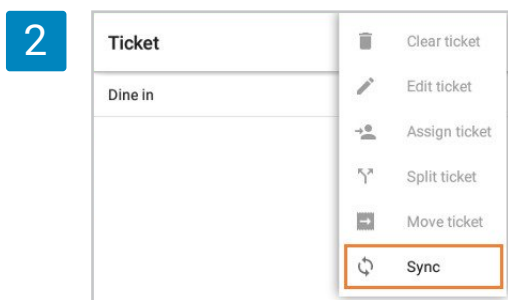
The Loyverse POS app works offline. Your device can continue to make sales and work with shifts even when it's not connected to the Internet. However, not all functions are supported offline; such as refunds, new customer registration, adding items, and few other restrictions.



When you make sales in offline mode, all of your receipts are stored locally in the device memory. If you go to the Receipt section you will see the receipts list. The receipts that were made in offline mode are marked as “Unsynced.”

Note

- If you sign out while your device has been disconnected from the Internet, you will lose your receipts made in the offline mode. Therefore, before logging out from Loyverse POS, make sure that all of your receipts have been transferred to the Back Office.
- You will not see all the offline sales in the Back Office. After the device restores connection to the Internet, receipts will be automatically synced with Loyverse Back Office.



You can also tap the sync button in the three dots menu to sync data with the Back Office manually. If you do this in offline mode, you will get ‘No internet connection’ message.

#8-1574 REFUND

58.03
Total

Cashier: Alex
POS: POS 07

Dine in

Chocolate truffle dessert 8.50

Refund button is not active in the offline mode, so you cannot perform refunds.

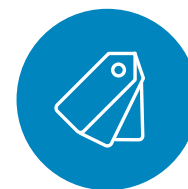
You cannot register new customers or edit the existing customers, but you can add to the ticket recently registered customers.

The open tickets work in offline mode but without synchronization with other devices. Email receipts are sent to customers only after the connection to the Internet is restored.

Other restrictions of the offline work

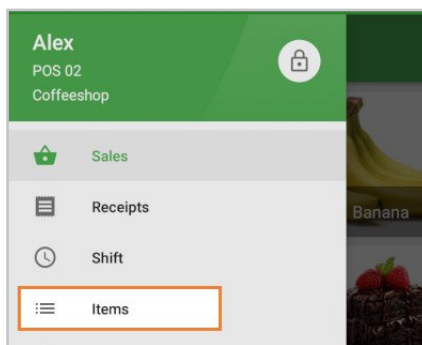
- If you have connected integrated card processing terminals they will not work offline.
- Items stock will not be displayed, as well as negative stock alerts; even if this option is enabled in the Back Office.

3. Items



3.1 Working with the Items List in the POS

1



Go to the 'Items' section of the menu.

2

Items		All items	
Apple	14 in stock	1.29	
Apple Juice	39 in stock	2.29	
Banana	55 in stock	2.20	
Blueberry Cake	5 in stock	3.10	
Cake	18 in stock	4.59	

You will see the items list with the current amount of stock under each item name. Items whose 'Track stock' option is switched off will be displayed with the dash symbol '-'.

3



To change the quantity in stock, tap on the desired item from the list.

If you choose an item whose stock is not tracked, switch on the 'Track stock' option in the Inventory section. Type the number in the 'In stock' field.

Note

If the option 'Track stock' is on for the item and you have active Advanced inventory management subscription, the Cost field will not be active but calculated automatically as the Average cost.




4

Variants					
Variant	Price	Cost	In stock	SKU	Barcode
S / White	20.00	10.00	19	10010	45840001
S / Black	20.00	10.00	5	10020	45840002
S / Red	20.00	10.00	8	10021	45840003
S / Yellow	20.00	10.00	16	10022	45840004
M / White	20.00	10.00	8	10023	45840005

SHOW ALL VARIANTS

For items with variants, you can specify the stock and cost for each variant. In the item list, the sum of in-stock numbers of all variants will be displayed.

5

Items		All items	
Items		Apple	1.29
Categories		Apple Juice	2.29
Discounts		Banana	2.20
		Blueberry Cake	3.10
		Cake	4.59

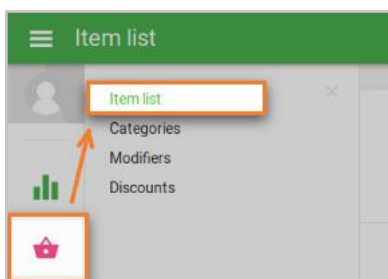
In the absence of an Internet connection (offline mode), the stock will not be displayed in the items list.

3.2 How to Add Barcodes to Items

Loyverse POS (Android, iOS) works with barcodes supported by your barcode scanner.

3.2.1 How to Add Item Barcode in the Back Office

1



Go to the 'Item list' menu. Find your item and open it.

2

Edit item

Name: **Coca Cola** Category: **Soft drinks**

Sold by: ☒ Each ☐ Weight

Price: **1.99** Cost: **0.25**

Leave the field blank to indicate the price upon sale

SKU: **10009** Barcode: **8595013621615**

Find a barcode on your item and enter it into the Barcode field.

You can avoid manual entry by connecting a barcode scanner to your PC or tablet and simply scanning in the barcodes. Click the Barcode field and then scan the code from the item.

Note

Before scanning the barcode by scanner, make sure to activate the Barcode field by clicking on it.

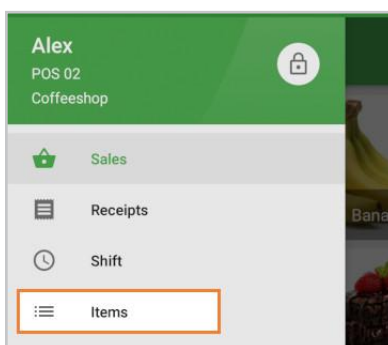
2

	A	B	C	D	E	F	G	H	
1	SKU	Name	Category	Cost	Price	Available for sale	Sold by weight	Barcode	SKU of i
2	1001	Apple Juice	Juice	1.44	2.29	Y	N	10544566251001	
3	1018	Banana	Fruits	0.88	2.19	Y	N	10544566251018	
4	1014	Black Tea	Hot Drinks	1.24	2.39	Y	N	10544566251014	
5	1019	Cake	Sweets	1.59	4.59	Y	N	10544566251019	
6	10000	Capuccino	Hot Drinks	1.02	1.99	Y	N	7622210286772	
7	1002	Carrot Fresh	Juice	0.8	4.99	Y	N	10544566251002	
8	10008	Chicken Caesar Salad	Salads	5.3	8.49	Y	N		
9	10006	Classic Cobb Salad	Salads	4.12	7.59	Y	N		
10	10009	Coca Cola	Soft drinks	0.25	1.99	Y	N	8595013621615	
11	1021	Cookies	Sweets	4.48	5.69	Y	N	10544566251021	
12	1011	Croissant	Sweets	0.76	4.79	Y	N	10544566251011	
13	1020	Fancy Cake	Sweets	2	4.69	Y	N	10544566251020	

You can also add barcodes by using the file import feature. Enter the barcodes into the Barcode column, save the file, and proceed to import.

3.2.2 How to Add Barcodes Using Loyverse POS App

1



Tap the main menu button in the top left corner, then tap Items.

2

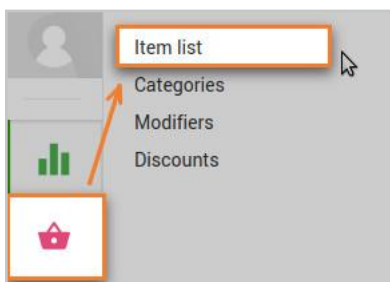
Open the item you want the barcode added to, and key in or scan the barcode into the Barcode field.

3.3 How to Use Variants of Items

The functionality of Variants allows you to condense the list of Items, simplifying their creation and management. This is a convenient tool to use if some products come in multiple versions, like different sizes or colors.

3.3.1 Creation and Set-up of Variants

1



Go to the 'Item list' menu in the back office.

2

If you have multiple stores, you can manage the dining options for each store.

3

Fill in the option name on the left field and the variants for this option on the right field. Press <Enter> button on your keyboard after each variant name to finalize the entry.

4

If necessary, create another option by clicking on the 'Add option' button. You can create up to 3 different options for each item. Don't forget to save your variants.

5

Variant	Price	Cost	SKU	Barcode
S / White	20.00	10.00	10010	
S / Black	20.00	10.00	10020	
S / Red	20.00	10.00	10021	
S / Yellow	20.00	10.00	10022	
M / White	20.00	10.00	10023	

The system will form a list of all the possible variants of the item. There is a limit of 200 possible combinations of variants for one item.

The price and cost of the variants are automatically taken from the parent item. SKU is also generated automatically.

For each variant, you can manually correct all the fields: Price, Cost, SKU and add a Barcode.

6

Available	Store	Variant	Price	In stock	Low stock
<input checked="" type="checkbox"/>	Shop	S / White	20.00	20	2
<input checked="" type="checkbox"/>	Shop	S / Black	20.00	5	2
<input checked="" type="checkbox"/>	Shop	S / Red	20.00	11	2
<input checked="" type="checkbox"/>	Shop	S / Yellow	20.00	16	2
<input checked="" type="checkbox"/>	Shop	M / White	20.00	10	2

If you have several stores, you can set up the price, in stock, and low stock of each variant for each store.

7

Item name	Category	Price	Cost	Margin	In stock
T-shirt	No category				62
S / White		20.00	10.00	50.00%	20
S / Black		20.00	10.00	50.00%	5
S / Red		20.00	10.00	50.00%	11
S / Yellow		20.00	10.00	50.00%	16

You can see the item with variants in the item list.

3.3.2 Variants at Sale and Report

1

Variant	
White / S 20.00	White / M 20.00
White / L 20.00	White / XL 20.00
White / XXL 20.00	Black / S 20.00
Black / M 20.00	Black / L 20.00

When selling from your mobile application, select the item with variants. A dialog box will open. Choose the desired variant of the item and click "Save".

2



An item with the selected variant will appear on the ticket.
Then carry out the same steps as you would normally.

3

Item name	Category	Items sold	Net sales	Cost of goods	Gross profit
T-shirt	No category	12	240.00	120.00	120.00
L / White		4	80.00	40.00	40.00
S / Red		1	20.00	10.00	10.00
M / White		1	20.00	10.00	10.00

You can see the sales of variants in the back office in the 'Sales by item' section in the 'Reports' menu."

3.3.3 Export-Import of Variants

It is easy to create variants of items by adding/editing item in the back office. But you can also import them through a file.

You can use the 'Export' and 'Import' button at the Item list in the back office as usual. However, there are some points you need to keep in mind.

1

Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name	Option 2 value	Option 3 name	Option 3 value	Cost	Bar
t-shirt	10017	T-shirt	Clothes	N	Color	White	Size	S			10	
t-shirt	10020					White		M			10	
t-shirt	10027					White		L			10	
t-shirt	10037					White		XL			10	
t-shirt	10038					White		XXL			10	
t-shirt	10039					Black		S			10	
t-shirt	10040					Black		M			10	
t-shirt	10041					Black		L			10	
t-shirt	10042					Black		XL			10	
t-shirt	10043					Black		XXL			10	
t-shirt	10044					Red		S			10	
t-shirt	10045					Red		M			10	
t-shirt	10046					Red		L			10	
t-shirt	10047					Red		XL			10	
t-shirt	10048					Red		XXL			10	
t-shirt	10049					Yellow		S			10	
t-shirt	10050					Yellow		M			10	
t-shirt	10051					Yellow		L			10	
t-shirt	10052					Yellow		XL			10	
t-shirt	10053					Yellow		XXL			10	
cap	10054	Cap	Clothes	N	Color	Black	Size	Big	Fabric	Cotton	5	
cap	10055					Black		Big		Silk	5	
cap	10056					Black		Small		Cotton	5	
cap	10057					Black		Small		Silk	5	
cap	10058					White		Big		Cotton	5	
cap	10059					White		Big		Silk	5	
cap	10060					White		Small		Cotton	5	

Export your items with variants and open the CSV file.

You can see that each combination of a variant in the export file is displayed as a separate item with its own SKU.

The 'Handle' field should be the same for all variants of the same item.

Only the fields of the first item with variants have values. The fields that are common to all variants of the same item are left blank. You may also fill them with the same value, but if they have a different value, you will get an error message when importing.

There are three columns each for 'Option name' and 'Option value'. If some products have less than 3 options of variants, the extra fields are left blank.

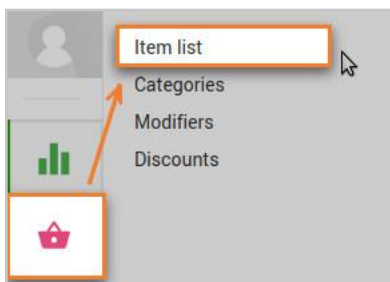
Note

For items without variants, it is better to leave the 'Handle' field blank in the importing file. In this case, the system will automatically generate the handles for the new items.

3.4 How to Create a Composite Item

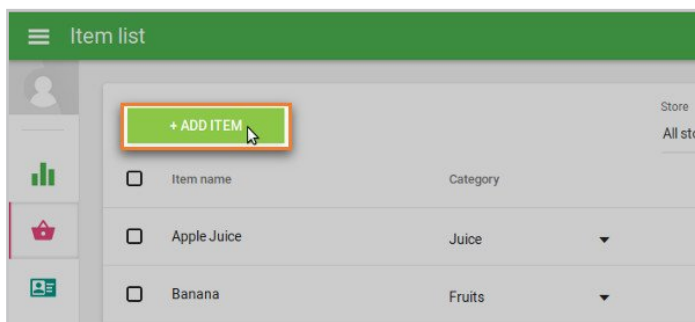
Composite items consist of a number of other items (components).

1



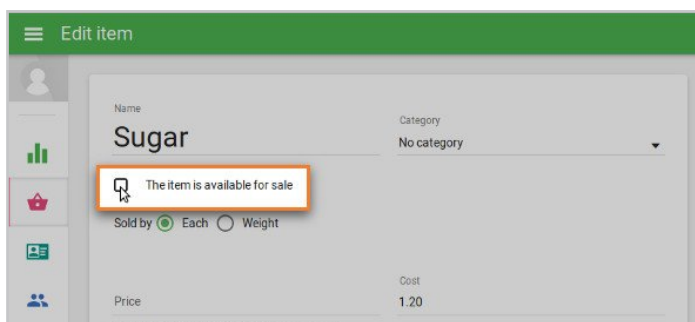
Go to the 'Item list' menu in the back office.

2



First, you have to create the components of a composite item. Create them as you would ordinary items by clicking on 'Add Item' button.

3



Give your item a name. If any component is not sold separately in your store, deselect the check-box. 'The item is available for sale', so it will not be seen in the items list during sales.

Fill in the cost field and save the component item.

If the 'Track stock' is switched on, then, during the sale of a composed item, the components' stock will be reduced.

4

Edit item

Name: Coffee 200ml Category: Soft drinks

☒ The item is available for sale

Sold by: ☒ Each ☐ Weight

Price: 0.80

Leave the field blank to indicate the price upon sale.

SKU: 10014 Barcode:

Inventory

Composite item ☒

Composite item contains a specified number of other items

Components	Quantity	Cost
------------	----------	------

After you have all the components, you can create a composite item by clicking on 'Add Item' button again.

Then switch on the 'Composite item' option in the Inventory section.

5

Inventory

Composite item ☒

Composite item contains a specified number of other items

Components	Quantity	Cost
Instant Coffee	0.02	0.07
M		0.07
Milk	1010	0.07
Supreme Pizza	10005	

Add components one by one searching for them in the items list.

6

Edit item

SKU: 10014 Barcode:

Inventory

Composite item ☒

Composite item contains a specified number of other items

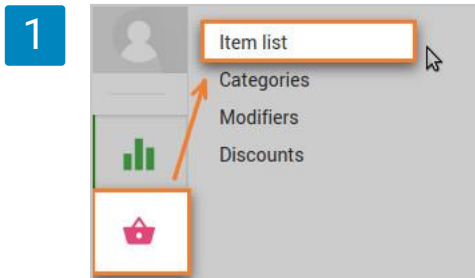
Components	Quantity	Cost
Instant Coffee	0.02	0.07
Milk	0.5	0.26
Sugar	0.02	0.02
Cost		0.35

The composite item cost will be calculated based on the quantity and cost of all components.

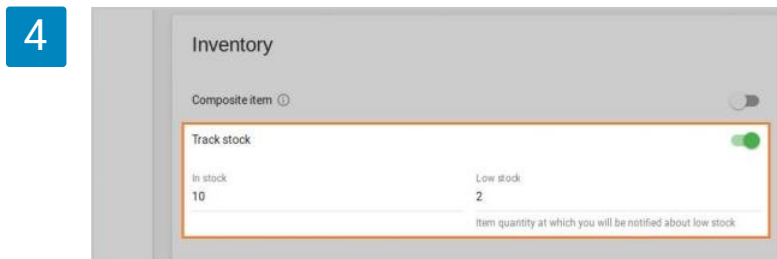
All other parameters of composite items can be filled in as usual.

3.5 Notification About Low Stock

Do you want to keep track of products with low stock directly from your back office? And even better – to receive an email notification that the stocks of a product are coming to an end? Loyverse POS gives you such opportunity. Also, activation and the setting up of this function will take no time at all. You should complete just five simple steps.



Go to the 'Item list' menu in the back office.

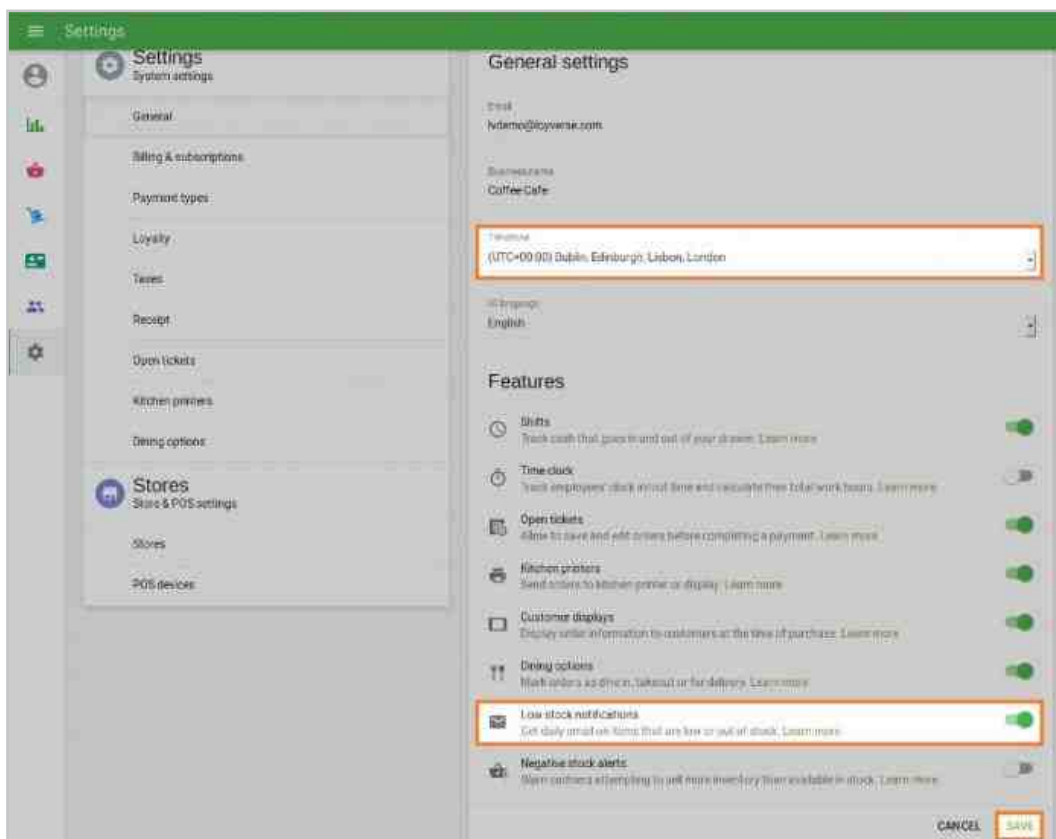


Open the necessary item to edit. Activate the option 'Track inventory', if it has not yet been activated. Under 'In stock', specify the item quantity that you have at the moment. In the field 'Low stock' enter the quantity at which you would like to be notified about the low stock.

Note

A record for a composite product is not kept. But you can set this function for each of its components.

5



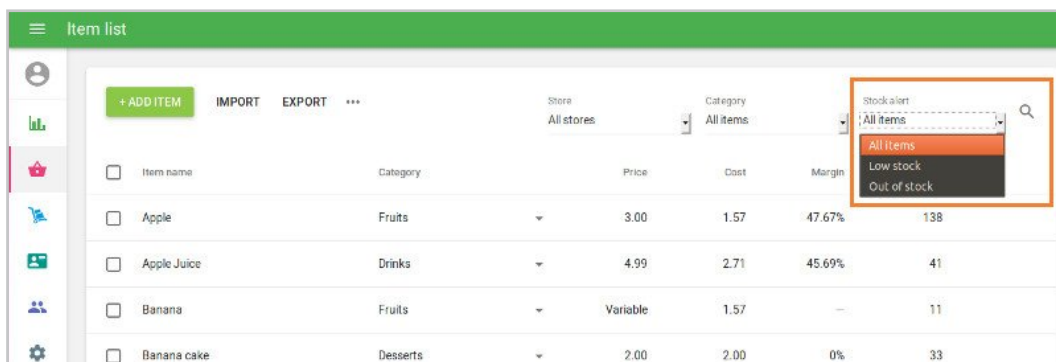
Go to the "Settings" section. The option "Low stock notifications" is activated by default. If you have disabled this before, activate it again. Select your timezone, and save your changes. Save your changes.

Note

Notification of low residue of an item or its complete absence will come to you by email at 10:00 in the time of zone that you have specified. If there are no items with low stock, no notification will be sent to you.

6

To view the current level of stock is possible without waiting till 10:00 go to "Item list" from the "Items" section. Here you will see the number of stock of each item, in the card of which you have selected the function "Track inventory". If any item stock is low or it is not available at all, then next to the residue you will see a proper notification.



Additionally, you can use the filter "Stock alert" in the top right corner of the screen. Just open it and select the option: "All items", "Low stock" or "Out of stock".

7

If you want to make batch changes in the inventory of your items you can do it through import/export option. First, export your items at the 'Item list' section. Open your CVS file for editing.

	I	J	K	L	M	
Item	Track inventory	Available for sale [The Coffee]	Price [The Coffee]	In stock [The Coffee]	Low stock [The Coffee]	Modi
	Y	Y	2.29	-7		3 Y
	Y	Y	2.19	99992		4 N
	Y	Y	12	95.5		7 N
0.5 N	Y		6			N
N	Y		2.39			Y
Y	Y		4.59	-15		1 Y
N	Y		variable			N
Y	Y		variable	21		5 N

In the 'Track stock,' column of the item set the value of 'Y' if you want to track inventory or 'N' if you don't want. You can also set the number of items in stock in the 'In stock' field and low stock notification number in the 'Low stock' field.

After editing file import it back to the system.

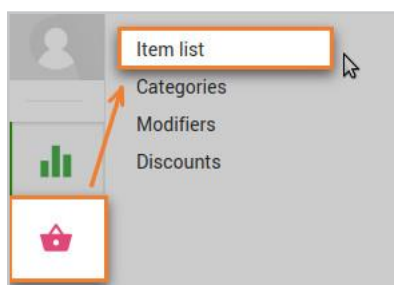
3.6 Exporting and Importing Items

Do you want to keep track of products with low stock directly from your back office? And even better – to receive an email notification that the stocks of a product are coming to an end? Loyverse POS gives you such opportunity. Also, activation and the setting up of this function will take no time at all. You should complete just five simple steps.

Note

To import your items smoothly and quickly, the correct sheet should be prepared. You can download the template, but the best way is to create sample items in the 'Item list', export them as a CSV file, and add all the rest of the items to the sheet.

1

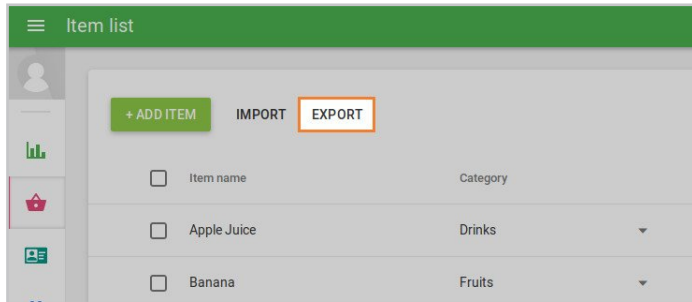


Let's start by adding a few sample items in the Back Office. Open 'Item list'.

Add the types of items that you are going to use in your store: composite items, items with variants, or just ordinary items. Fill in the parameters you are going to use with your items: track stock, in stock, low stock notification, price, cost, etc.

Add categories, modifiers, and taxes and apply them to your items. If you have several stores, do not forget to add these stores in the Back Office and set the item's availability for each store.

2



When you have a list of sample items, you can export them. Click on the 'Export' button.

3

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name	Option 2 value	Option 3 name	Option 3 value	Cost	Barcode
2	apple-juice	1001	Apple Juice	Drinks	N							1.44	10544586251001
3	banana	1018	Banana	Fruits	N							12.12	10544586251012
4	beef-and-chicken-satay	10021	Beef and Chicken Satay	Meals	N							9	
5	beer	10018	Beer	Drinks	Y							5	
6	beer-glass	10019	Beer glass	Drinks	Y							3.5	
7	beer-glass-0.5-l	10010	Beer glass 0.5 L	Drinks	N								50A-sku-3456
8	black-tea	1014	Black Tea	Hot Drinks	N								10544586251014
9													
10	cake	1019	Cake	Sweets	N							1.61	10544586251019
11	cap	10054	Cap	Clothes	N	Color	Black	Size	Big	Fabric	Cotton	5	
12	cap	10055					Black		Big		Silk	5	
13	cap	10056					Black		Small		Cotton	5	
14	cap	10057					Black		Small		Silk	5	
15	cap	10058					White		Big		Cotton	5	
16	cap	10059					White		Big		Silk	5	
17	cap	10060					White		Small		Cotton	5	
18	cap	10061					White		Small		Silk	5	
19	capuccino	10000	Capuccino	Hot Drinks	N							1	7622210266772
20	carrot-fresh	1002	Carrot Fresh	Juice	N							0	10544586251002
21	cashew-nuts	10009	Cashew nuts	Fruits	Y							0	
22	cheesecake	10015	Cheesecake	Sweets	N							4.29	
23	chicken-caesar-salad	10008	Chicken Caesar Salad	Salads	N							5.3	

Open your CSV file (the best way is to open it from Google Sheets, but you can also use other tools). You will see the sheet with your sample items. You can use it to add other items you intend to import. Follow the pattern of your sample items when filling in the fields.

Note

- CSV (comma-separated values) format is where the fields are separated by commas, so avoid commas in your data.
- For fields with money value, such as 'Price' and 'Cost', use only numbers – no currency symbols. The decimal separator must be a point.

3.6.1 Features of Different Types of Items

There are some specific points you have to pay attention to when adding data for each type of items: ordinary items, composite items, items with variants, and multistore.

Ordinary items

	A	B	C	D	E	F	G	H
1	Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name
2	apple-juice	1001	Apple Juice	Drinks	N			
3	banana	1018	Banana	Fruits	N			
4	beef-and-chicken-satay	10021	Beef and Chicken Satay	Meals	N			
5	black-tea	1014	Black Tea	Hot Drinks	N			
6	capuccino	10000	Capuccino	Hot Drinks	N			
7	carrot-fresh	1002	Carrot Fresh	Juice	N			
8	cashew-nuts	10009	Cashew nuts	Fruits	Y			
9	cheesecake	10015	Cheesecake	Sweets	N			
10	chicken-caesar-salad	10008	Chicken Caesar Salad	Salads	N			
11	classic-cobb-salad	10006	Classic Cobb Salad	Salads	N			
12	coffee	10014	Coffee	Drinks	N			
13	coffee-200ml	10016	Coffee 200ml	Drinks	N			

Ordinary items – items that are not composite and does not have variants.

For items without variants, it is better to leave the 'Handle' field blank in the importing file. In this case, the system will automatically generate unique handles for the new items.

'SKU' is an obligatory field and should be unique for each item. The 'Name' is also an obligatory field.

Also, leave the columns of 'Option name' and 'Option value' blank because they are for variants of items.

Leave the column 'SKU of included item' blank because it is only for composite items.

Multiple stores

	Q	R	S	T	U	V	W	X	Y
Track stock	Available for sale [The Coffee]	Price [The Coffee]	In stock [The Coffee]	Low stock [The Coffee]	Available for sale [Store 2]	Price [Store 2]	In stock [Store 2]	Low stock [Store 2]	
Y	N	2.29	21	2	N	2.29	10		
Y	Y	2.19	67	4	Y	2.19	15		
Y	Y	12.03	48	4	Y	12.03	17		
N	Y	5.3			Y	5.3			
Y	Y	8	8	5	Y	8	16		
Y	N	15	12	0	N	15	14		
Y	Y	7	57	5	Y	7	65		
Y	Y	14	14		Y	14	55		
N	Y	7.59			Y	7.59			
N	Y	4			Y	4			

In case of you have multiple stores, you will have the following columns for each store: Available for sale, Price, In stock, and Low stock. Each of the 4 columns will have the store's name in brackets next to it. For example, Available for sale [The Coffee] and Available for sale [Store 2]. So, you can set the values of these parameters for each of your stores.

Items with variants

A	B	C	D	E	F	G	H	I	J	K	L	M
Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name	Option 2 value	Option 3 name	Option 3 value	Cost	Base price
t-shirt	10017	T-shirt	Clothes	N	Color	White	Size	S			10	
t-shirt	10020					White		M			10	
t-shirt	10027					White		L			10	
t-shirt	10037					White		XL			10	
t-shirt	10038					White		XXL			10	
t-shirt	10039					Black		S			10	
t-shirt	10040					Black		M			10	
t-shirt	10041					Black		L			10	
t-shirt	10042					Black		XL			10	
t-shirt	10043					Black		XXL			10	
t-shirt	10044					Red		S			10	

You can see that each combination of a variant in the export file is displayed as a separate item with its own SKU. Follow this pattern as a guideline for your items with variants.

The 'Handle' field is required for items with variants and it should be the same for all variants of the same item.

Only the fields of the first item with variants have values. The fields that are common to all variants of the same item are left blank. You may also fill them with the same value, but if they have a different value, you will get an error message when importing.

There are three columns each for 'Option name' and 'Option value'. If some products have less than 3 options of variants, the extra fields are left blank.

Composite items

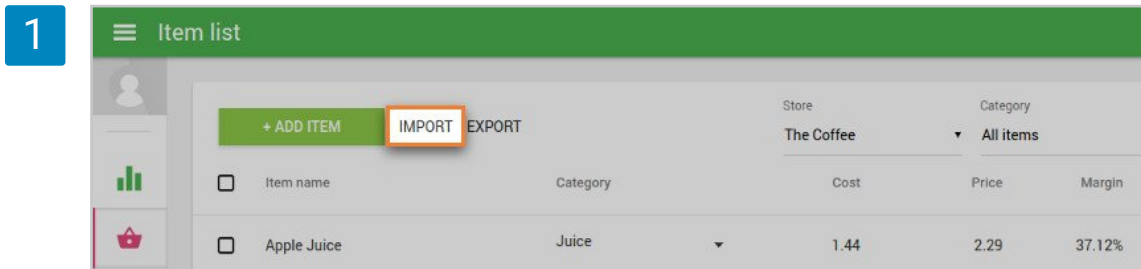
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Handle	SKU	Name	Category	Sold	Opti	Opti	Opti	Opti	Opti	Opti	Defa	Cost	Barcode	SKU of included item	Quantity of included item	Track stock
coffee-200ml	10016	Coffee 200ml	Drinks	N							2			10013	0.02	Y
														1010	0.05	
														10011	0.02	
cookies	1021	Cookies	Sweets	N							varia	0.75	10544566251021			Y
croissant	1011	Croissant	Sweets	N							varia	1.4	10544566251011			Y
dadjah	10036	Dadjah	Drinks	N							varia	0	3245675991148			N
fancy-cake	1020	Fancy Cake	Sweets	N							varia	2	10544566251020			Y

Each composite item includes several components. Specify SKU codes of all the included items (components) of the selected composite item in the field 'SKU of included item' on a separate row.

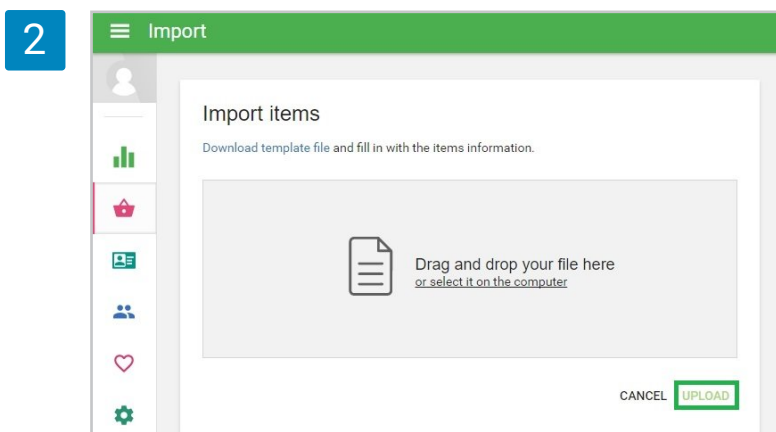
'Quantity of included item' – in this field, it's necessary to specify the quantity of the component that is included in one unit of the composite item.

You cannot track stock of composite items, so leave the fields that are related to stocks blank. Also, leave all the other fields of components blank except for the first row.

3.6.2 Import of Items



Click on the 'Import' button.

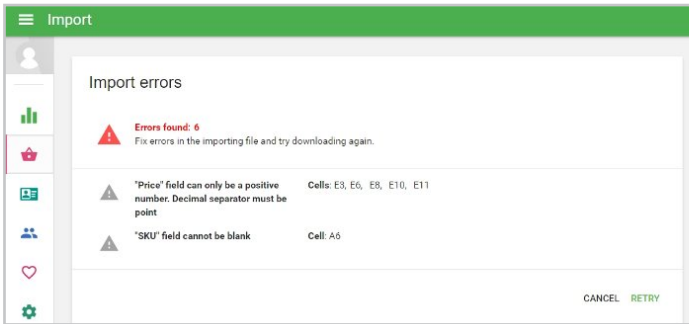


In the IMPORT menu, choose your CSV file from your computer and click 'Upload'.

If you filled in the table without errors, you will be directed to an import confirmation window. There, you will see information on how many items and categories will be created or edited. Click 'CONFIRM IMPORT'.

You will see a notification message that the list of items has been successfully updated. Click 'OK' and continue your work.

Import errors



You may be faced with some errors when uploading the completed file. An error message will appear if:

- You changed the file format so that the file you are trying to upload is no longer in CSV format.
- The size of your file exceeds the admissible 5 MB.
- You edited names of columns that should have been left unedited.
- You have more than 10,000 items saved in your file.

In the next stage, you may be faced with import errors. In this case, the window with the corresponding message will open.

The critical errors are marked with a red sign. Each error has its explanation message and the place of the error: row, column, and cell. Fix all critical errors in the file and try to import the file again.

Warning messages have yellow signs. They are just for your information, and they will not stop your file from being imported.

3.6.3 The Meaning of Columns

Handle

A handle is an item identifier, which should be unique for each item. The 'Handle' field should be the same for all variants of the same item.

SKU

SKU (Stock Keeping Unit) is a unique code given to each of your items. Specify and fill in each field individually. We recommend using the format '10001', '10002'... etc. but the key point is that no numbers are repeated. One last condition is that the SKU should not exceed 40 characters.

Name

Fill in the names of each imported item in this field. You can use letters, digits, spaces, and any special symbols, as long as you use no more than 64 total characters.

Category

A category is a group to which an item belongs. For example, if you create the items 'Cherries', 'Apples', and 'Oranges', then you can put them into the 'Fruits' category.

Cost

Cost is the amount of money you paid to purchase the item. Here, specify the cost of the items only using digits - no currency symbols. Do not fill in the cost field for composite items. This will be calculated automatically as a sum of costs for each individual component.

Price

In this field, fill in the price at which you plan to sell the items. As with the 'Cost' field, enter only digits without currency symbols. If you want to specify the item price during a sale, leave this field empty.

Available for sale

Here, it's only necessary to specify one character: 'Y' (Yes) – if the item is available for sale, or 'N' (No) – if it is not available. It is important to note that if you ignore this field, then the item will be available for sale by default.

Sold by weight

If the item is sold by weight, enter 'Y' in the field, and if not, enter 'N'. Again, if you do not fill in this field, the item will be sold by weight as default.

Option 1, 2, 3 name

These fields are for option names of the variants. Leave them blank for items without variants.

Option 1, 2, 3 value

These fields are for option values of the variants. Leave them blank for items without variants.

Barcode

If a barcode is available, then fill in this field with the item's barcode digits.

SKU of included item

Each composite item includes several components. Specify SKU codes of all the included items (components) of the selected composite item here. Leave blank for non-composite items.

Quantity of included item

In this field, it's necessary to specify the quantity of the component that is included in one unit of the composite item. For example, for one portion of the composite item 'Americano with milk', you use 0.1L of the item 'Milk'. This means you should fill in the value 0.1 in the 'Quantity of included item' field nearby 'Milk'.

Track stock

If you would like to track the inventory of a selected item, enter 'Y' in the field and if not, enter 'N'. If you leave this field empty, then it will not track the inventory of that item.

In stock

If you would like to track inventory, then fill in an item's current quantity in this field, again only using digits. To avoid confusion with units (e.g., weight), we advise specifying them in brackets nearby the item name in the 'Name' field. For example, if you have 100 kg of potato in stock, then write 'Potato (kg)' in the 'Name' field and '100' under 'in stock'.

If you have selected the option 'Track stock', but did not specify a quantity, then the unit will automatically be zero.

Low stock

In this field, enter the quantity at which you would like to be notified about the low stock. Notification of low stock of an item or its complete absence will be sent to the owner's email at 10:00 A.M. in the time zone that you have specified. If there are no items with low stock, no notification will be sent to you.

Modifier – "Name of modifier"

Here, it's only necessary to specify one character: 'Y' (Yes) – if the item has a modifier, or 'N' (No) – if it is not available.

Tax – "Name of tax"

Here, it's only necessary to specify one character: 'Y' (Yes) – if the tax is applied to this item or 'N' (No) – if it is not applied.

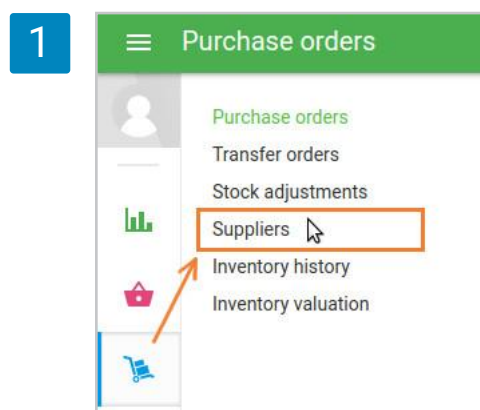
4. Advanced Inventory



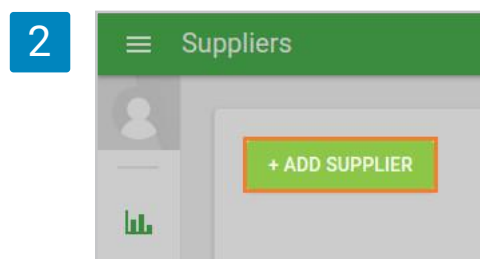
4.1 How to Work with Purchase Orders and Suppliers

'Purchase orders' is a part of the 'Advanced inventory management' option and allows you to create and save orders for the supply of products, to send orders to suppliers, to receive products, and to save information of suppliers in the system. These options are available only to those users who have subscribed to this functionality.

4.1.1 Suppliers



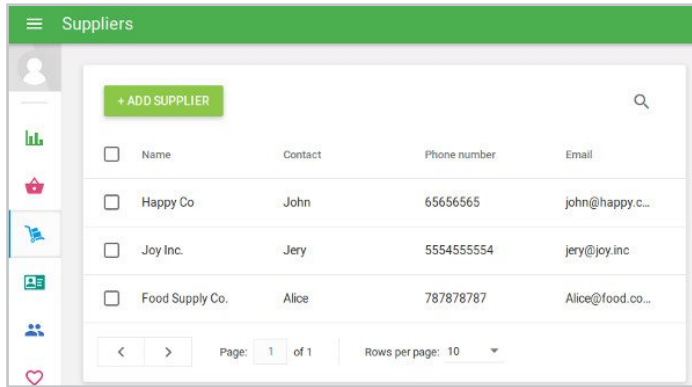
Go to 'Suppliers' section in the 'Inventory management' menu.



To create a supplier, click '+ Add supplier' button.

In the 'Create supplier' form, 'Supplier's name' is a required field and should be unique. The other fields are optional and can be left blank, but remember, that this information will be used to create the Purchase Order in the next step.

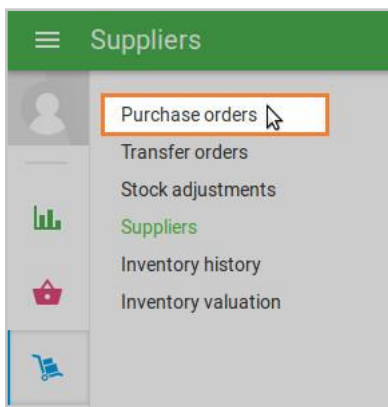
4



After you have created a list of your suppliers, you can start making purchase orders.

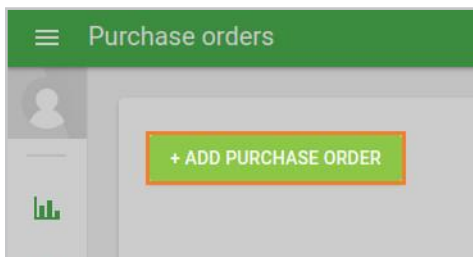
4.1.2 Making Purchase Orders

1



Go to 'Purchase orders' section in the 'Advanced Inventory' menu.

2



To create an order, click on '+ Add purchase order' button.

3

The form 'Create purchase order' will open for editing.

4

Supplier

Store

Expected on

Notes 0 / 500

Choose the supplier from the 'Supplier' drop-down list.

You can set the 'Purchase order date' to the date you want the order to be put in. You can also set the date you expect your order to arrive in the 'Expected on' field and make notes for your order in the 'Notes' field.

5

Items

Search item

Beer glass
SKU 10019

Cake
SKU 1019

Capuccino
SKU 10000

Carrot Fresh
SKU 1002

Cashew nuts
SKU 10009

Cheesecake

In the 'Items' section, you can add items from the list of your items. If you click on the field, a drop-down list of your items will appear, and you can type in the item's name, SKU or barcode to find the desired item.

5

Items

Item	In stock	Incoming	Quantity	Purchase cost	Amount
Cake SKU 1019	114	0	10	2.05	20.50
Cheesecake SKU 10015	50	0	16	2.10	33.60
Cookies SKU 1021	42	0	100	0.75	75.00
Total					129.10

Search item

CANCEL SAVE AS DRAFT CREATE

Fill in the 'Quantity' and the 'Default purchase cost'.

You can add more items to the order in the same way as above.

The 'Incoming' fields indicate the expected quantity of items to be received based on all existing purchase orders but have not yet been received.

Click on the 'Create' button to make a purchase order, or save it as a draft for further corrections.

6

The screenshot shows a mobile application interface for 'Purchase order details'. At the top, there's a green header with a menu icon and the title 'Purchase order details'. Below the header, there's a navigation bar with icons for various functions. The main content area displays the details of a purchase order PO1001, which is in a 'Pending' state. It includes fields for 'Date' (Feb 06, 2018), 'Ordered by' (Alex), 'Supplier' (Happy Co), and 'Destination store' (The Coffee, 21 Avenue, Brooklyn, New York, NY, United States). A table lists the items ordered: Cake (SKU 1019), Cheesecake (SKU 10015), and Cookies (SKU 1021), with their respective quantities, purchase costs, and amounts. The total amount is 129.10.

Item	Quantity	Purchase cost	Amount
Cake SKU 1019	10	2.05	20.50
Cheesecake SKU 10015	16	2.10	33.60
Cookies SKU 1021	100	0.75	75.00
Total			129.10

Now your purchase order has been created.

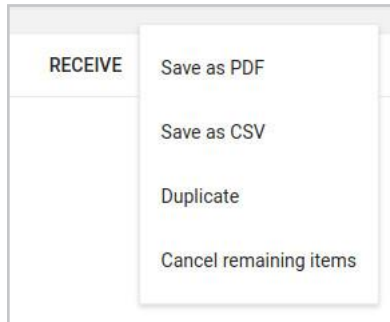
4.1.3 Actions with the Purchase Order

1

The screenshot shows a mobile application interface for sending a purchase order by email. The form is titled 'Send purchase order by email' and includes fields for 'From' (a@gmail.com), 'To' (john@happy.com), 'Cc', 'Subject' (Purchase order from Shop (PO1006)), 'Message' (Sweets), and 'Attachment' (PO1006). At the bottom, there are 'CANCEL' and 'SEND' buttons.

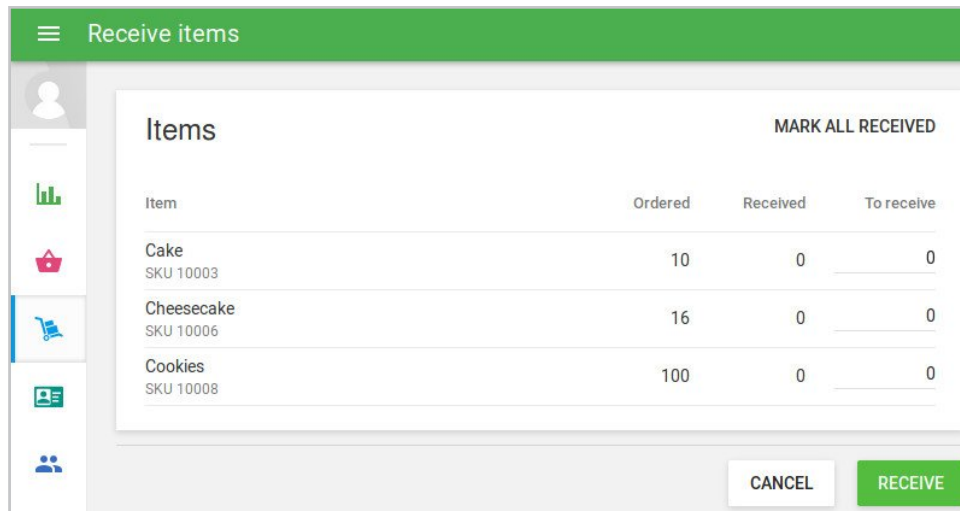
You can send your purchase order to your supplier. Click on the 'Send' button at the top. Fill out the email form and click the 'Send' button at the bottom. The purchase order will be sent to your supplier as an attached file.

2



To edit the order, click on the 'Edit' button at the top.
There are additional operations available with the purchase order in the 'More' menu.

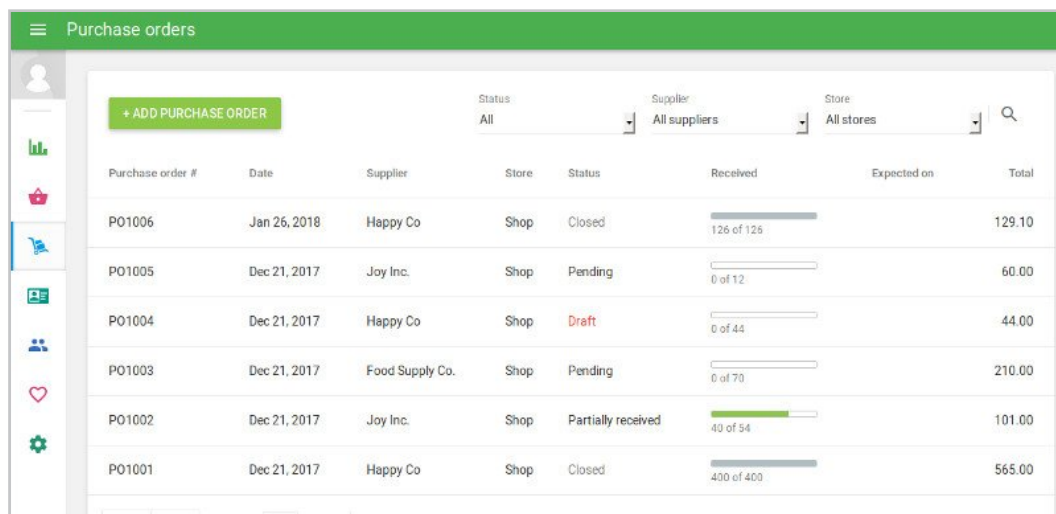
3



To confirm receiving an order, click on the 'Receive' button at the top.
You can put the number of items 'To receive' or 'Mark all received' and click on the 'Receive' button.

Afterwards, the stock of the received items will be updated according to the supplied amount. Also, the value of the average cost for each received item will be updated based on the 'Default purchase cost' specified in the order.

4



Purchase orders can have 4 different status: Draft, Pending, Partially received and Closed.

4.2 Autofill of the Items in the Purchase Order

The autofill option allows you to add items to the purchase order in one click.

1

Stores

☒ The item is available for sale in all stores

Available	Store	Price	In stock	Low stock	Optimal stock
<input checked="" type="checkbox"/>	Store 2		0		
<input checked="" type="checkbox"/>	The Coffee		0		

In the Items form, fill in the 'Low stock' and 'Optimal stock' fields.

2

Create purchase order

Supplier: Happy Co Store: Store 3

Purchase order date: Mar 25, 2018 Expected on:

Notes: 0 / 500

Items

AUTOFILL

Item	In stock	Incoming	Quantity	Purchase cost	Amount
Search item					
Add additional costs					
Total				0.00	

CANCEL SAVE AS DRAFT CREATE

Open for editing the existing purchase order or create new.

3

All items from supplier

Low stock items from supplier

After selecting the Supplier and Store for your Purchase order, you can choose one of the autofill options between 'All items from supplier' or 'Low stock items from supplier'.

If you select the 'All items from supplier', the system adds all the items with the selected supplier specified in their attributes.

If you select the 'Low stock items from supplier', the system adds all the items with the selected supplier specified in their attributes which have a stock value that is less or equal to its 'Low stock' value.

Items

AUTOFILL ▼

Item	In stock	Incoming	Quantity	Purchase cost	Amount
1test SKU 10047	3	0	2	10.00	20.00
<div>Search item</div>					
<div>Add additional costs</div>					
Total					20.00

CANCEL

SAVE AS DRAFT

CREATE

The quantity field will be filled in with the default value, calculated by the formula:

$$\text{Quantity} = \text{Optimal stock} - \text{In stock} - \text{Incoming}$$

Optimal stock – the value of optimal stock set at the item's form in the selected store.

In stock – the current stock of the item in the selected store.

Incoming – the quantity of items that are expected at the selected store (the quantity of items not received in other purchase orders with the statuses "Expected", "Partially received", and transfer orders with the status "In transit").

For items whose 'Optimal stock' is blank, the 'Quantity' field will be empty.

You can change the default quantity with your value and proceed further with the purchase order.

4.3 How to Work with Additional Costs in the Purchase Orders

When a retailer makes purchases, very often there are other expenses besides the amount of the ordered items. It can be the expenses for shipping, packaging, customs fee, and others. Thus, the total cost of goods can be higher than indicated in the order to the supplier.

The possibility to specify additional costs in a purchase order allows you to take them into account in the final cost of goods and, therefore, obtain more accurate business profitability indicators.

1

Item	In stock	Incoming	Quantity	Purchase cost	Amount
Apple SKU 10013	0	0	24	0.56	13.44
Banana SKU 10012	6	54	124.000	0.65	80.60

Total 94.04

Open the saved purchase order to edit or create a new one. Click 'Add additional costs' at the bottom of the order.

2

Additional cost	Amount
Shipping	14.00
Packaging	4.00

Total 112.04

Fill in the 'Additional cost' name and 'Amount'. The amount can also be a negative value, in case you receive a discount from your supplier. Click on the '+ Add additional cost' button to add a new line for additional costs.

3

Purchase order details

Purchase orders APPROVE EDIT SEND MORE

PO1008
Draft
Received 0 of 148

Date: Mar 02, 2018
Ordered by: Owner

Supplier: Joy Inc.
Jery
5554555554
jery@joy.inc

Destination store: Shop 2
95 Ashland Pl, Brooklyn, NY 11201, USA

Items

Item	Quantity	Purchase cost	Amount
Apple SKU 10013	24	0.56	13.44
Banana SKU 10012	124	0.65	80.60

Additional cost

Additional cost	Amount
Shipping	14.00
Packaging	4.00
Total	112.04

After saving or creating the Purchase order, you will see the additional cost section in the details of your purchase order with their amount added to the items amount to calculate the 'Total' of the order.

4

Receive items

Items MARK ALL RECEIVED

Item	Ordered	Received	To receive
Apple SKU 10013	24	0	24
Banana SKU 10012	124	0	124

Select additional costs to apply to this receipt

Additional cost

Additional cost	Amount
<input checked="" type="checkbox"/> Shipping	14.00
<input type="checkbox"/> Packaging	4.00

CANCEL RECEIVE

During the confirmation of receiving a purchase order, you can select which additional costs to take into account in the cost of the received items.

If you partially receive an order, you can apply the additional costs to only some of the items from the purchase order. In this case, the additional cost will be taken into account in the purchase price calculation of the selected item.

5

sts to apply to this receipt

When receiving all items all unreceived additional costs will be cancelled

CANCEL CONFIRM

If you have no more items left and have unselected additional costs in the order, you will get the notification that all unreceived additional costs will be canceled. Confirm your choice to proceed.

6

Additional cost	Amount
Shipping	14.00
Packaging Cancelled	4.00
Total	108.04

The unreceived additional costs will be marked as canceled in the received purchase order details.

Note

After you have received the purchase order, the system calculates a new weighted Average cost for each item, taking into account the selected additional costs, in order to provide a more accurate calculation of the Total inventory value and Potential profit indicators in the 'Inventory valuation' report.

The total amount of the selected additional costs is distributed over all received items in proportion to the purchase cost of each item received in the order.

The final purchase cost of an item in an order, taking into account additional costs **C_{final}**, will be calculated like this:

$$C_{final} = C1 \times \left(1 + \frac{GrossProfit}{NetSales}\right)$$

C1 – purchase cost of the received item.

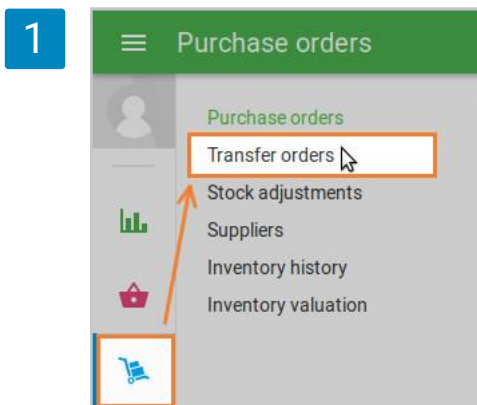
Costs – the total amount of the selected additional costs when receiving the purchase order.

Subtotal – the total values of all items received in the order (without additional costs).

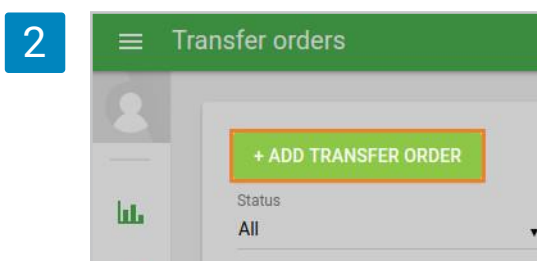
4.4 How to Work with Transfer Orders

Transfer orders functionality allows a multiple store owner to distribute items correctly between his/her stores.

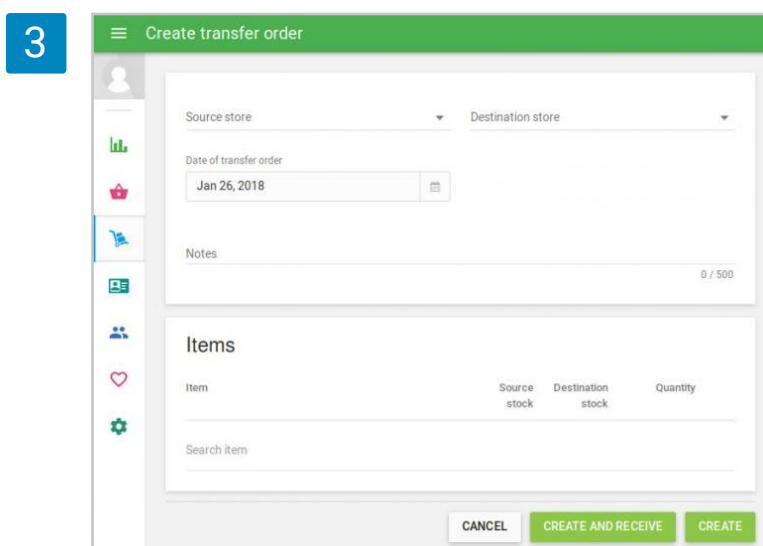
Transfer orders is a part of the advanced inventory management and is available only to those users who have subscribed to this functionality.



Go to 'Transfer Orders' section in the 'Inventory management' menu.



To create a transfer, click '+ Add transfer order' button.



The form 'Create transfer order' will open for editing.

4

Create transfer order

Source store: Shop

Date of transfer order: Jan 26, 2018

Destination store: Shop 2

Notes: 0 / 500

Choose 'Source store' and 'Destination store' from the drop-down list of your stores.

You can change the 'Date of transfer order', enabling you to schedule a transfer in advance or to record a transfer from the past. You can also make notes for your order in the 'Notes' field.

5

Items

Item	Source stock	Destination stock	Quantity
Capuccino SKU 10004	18	0	9
Cheesecake SKU 10006	24	5	12

Search item

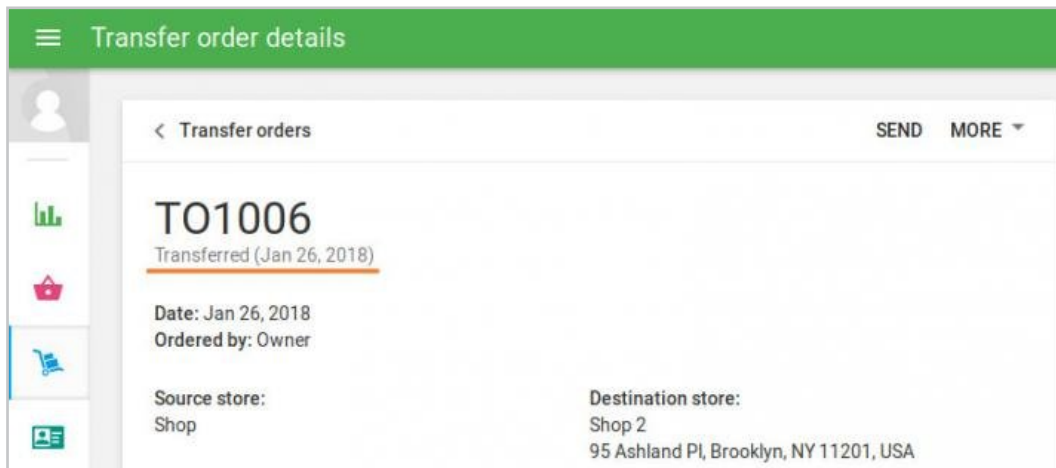
CANCEL CREATE AND RECEIVE CREATE

In the 'Items' section, you can add items from the list of your items with the track stock option on. You will see the stock information of the chosen items at the source and destination stores. Fill in the 'Quantity' field with the amount you would like to transfer.

Click the 'Create and receive' button to make the transfer order and complete the transfer, which will mark the transfer as received and change the stock in source and destination, or click on the 'Create' button to make a transfer order, which reduce only the source stock.

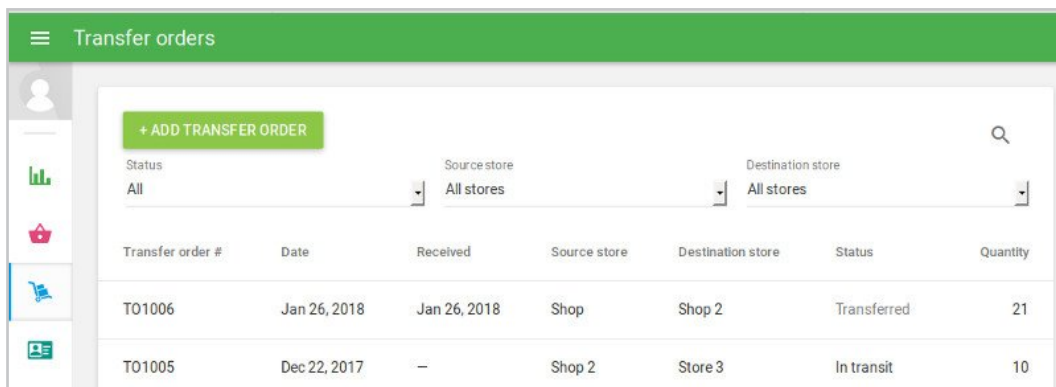
You can send your transfer order by email to the destination store by clicking on the 'Send' button at the top. To edit the order, click on the 'Edit' button. There are additional operations available with the transfer order in the 'More' menu: download as PDF or CSV file.

6



To confirm receiving items in the destination store, click on the 'Receive' button at the top. Afterwards, the stock of the transferred items in the destination store will be changed according to the transferred amount. You will see the completed transfer order.

7



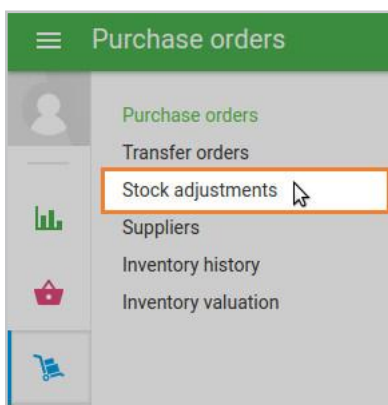
Purchase orders can have 4 different status: Draft, Pending, Partially received and Closed.

4.5 How to Work with Stock Adjustments

Stock Adjustment functionality allows you to modify the stock of items and indicate the reason for that adjustment.

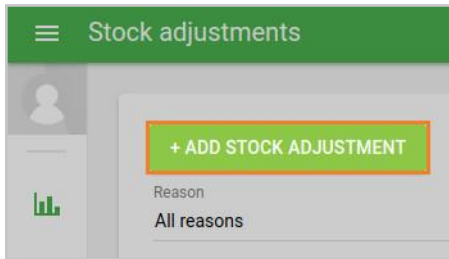
Stock Adjustments is a part of the Advanced inventory management and are available only to those users who have subscribed to this functionality.

1



Go to 'Stock adjustments' section in the 'Inventory management' menu.

2



Go to 'Stock adjustments' section in the 'Inventory management' menu.

3

The form 'Create stock adjustment' will open for editing.

4

From the drop-down menu, select the reason for the adjustment and choose the store. You can make notes for your adjustment in the 'Notes' field. In the Items section, add the items you are adjusting from your items list.

5

If you have chosen 'Receive Items' as the adjustment reason, fill in the 'Add stock' and 'Cost' fields for each item.

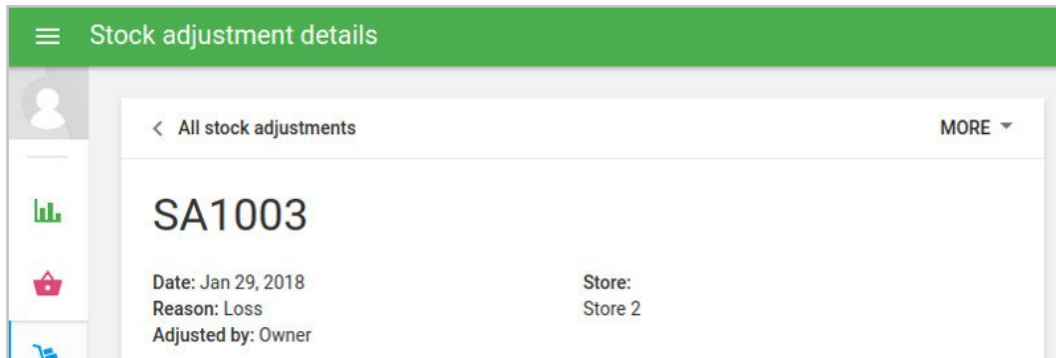
If you have chosen 'Receive Items' as the adjustment reason, fill in the 'Add stock' and 'Cost' fields for each item.

If you have chosen 'Inventory recount' as the adjustment reason, fill in the 'Counted stock' field for each item.

If you have chosen 'Loss' or 'Damaged' as the adjustment reason, fill in the 'Remove stock' field for each item.

Click the 'Adjust' button to complete adjustment.

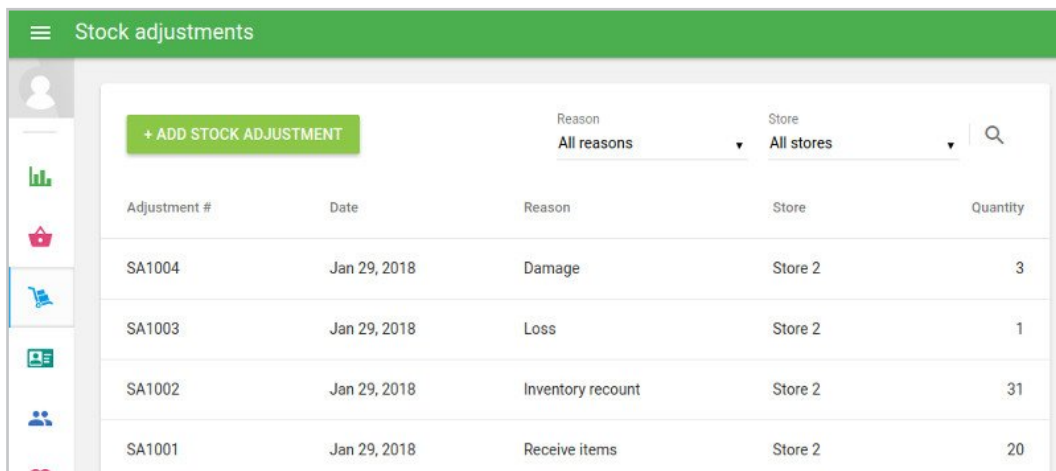
6



Afterwards, the stock of the adjusted items will be changed. You will see the stock adjustment details.

Under 'More' menu you can find 'Save as PDF' and 'Save as CSV' option to do with the document.

7



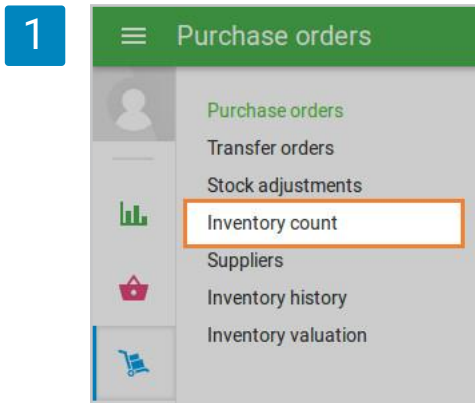
You can see the list of all adjustments as shown below.

4.6 How to Work with Inventory Count

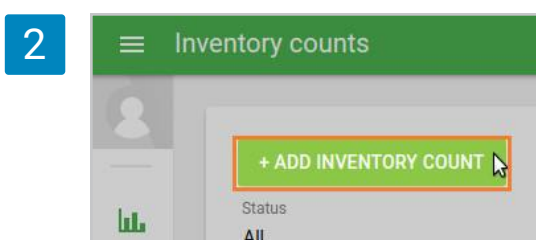
Inventory Count is a part of the Advanced inventory management and is available only to those users who have subscribed to this functionality.

Inventory Count functionality allows to:

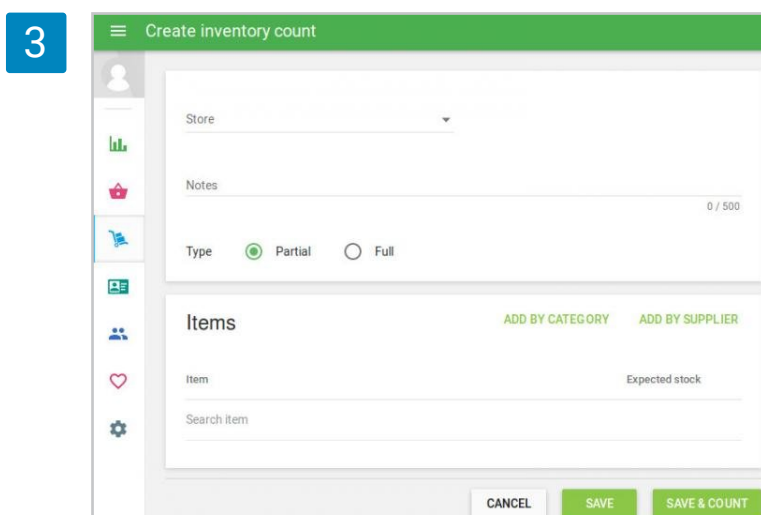
- reconcile the expected and actual inventory for all or selected items;
- see the amount of inventory loss or surplus inventory;
- keep documents for each inventory.



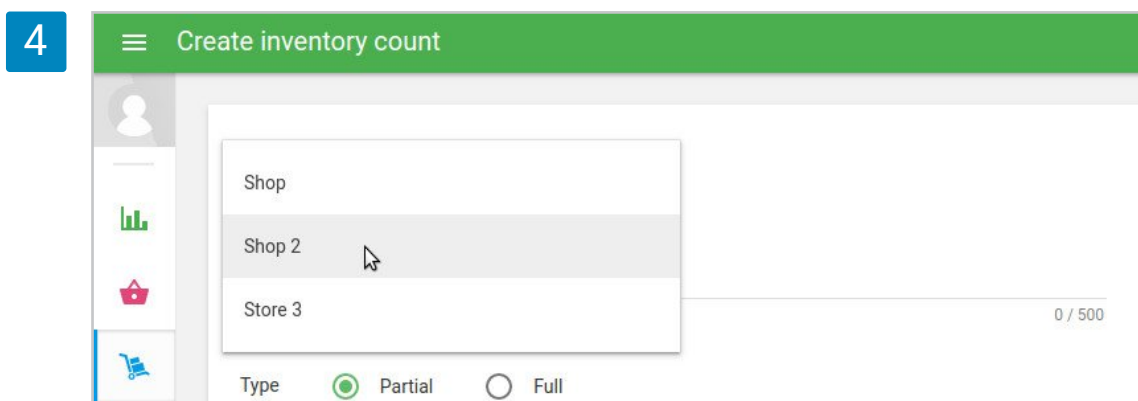
Go to the 'Inventory Count' section in the 'Inventory management' menu.



To create an inventory count, click on the '+ Add inventory count' button.



The form 'Create inventory count' will open for editing.



Select the store from the drop-down list where you would like to perform the inventory count. You can also make notes in the 'Notes' field.

Then choose the type of your inventory count: 'Partial' or 'Full'.

5

The screenshot shows the 'Type' section with 'Full' selected. Below it, the 'Items' section contains the text 'All items will be counted.' At the bottom, there are three buttons: 'CANCEL', 'SAVE', and 'SAVE & COUNT'.

For a Full inventory count, you do not need to choose the items for the count, because all items in the system whose 'track stock' option is enabled will be automatically added to the document.

6

The screenshot shows the 'Type' section with 'Partial' selected. Below it, the 'Items' section has two buttons: 'ADD BY CATEGORY' and 'ADD BY SUPPLIER'. A table lists items with their 'Expected stock' values. At the bottom, there are three buttons: 'CANCEL', 'SAVE', and 'SAVE & COUNT'.

Item	Expected stock
Cake SKU 10003	30
Capuccino SKU 10004	9

For a Partial inventory count, you have to add the items to the count manually.

You can add items to the list one by one in the 'Search Item' field, or you can add a whole category by clicking on the 'Add by category' button, as well as adding all items assigned to a certain supplier by clicking on the 'Add by supplier' button.

Please note that when adding items to the list, you will not see composite items and items whose track stock option has been disabled. If the product contains variants, then all the variants are displayed in separate rows.

You will see the current stock information of the chosen items in the selected store at the 'Expected stock' column.

7

Inventory count details

< All inventory counts COUNT STOCK EDIT MORE ▾

IC1002
Pending

Date created: Feb 28, 2018 4:24 PM Store: Shop 2
Created by: Owner 95 Ashland Pl, Brooklyn, NY 11201, USA

Items

Item	Expected	Counted	Difference	Cost difference
Cake SKU 10003	30	—	—	—
Capuccino SKU 10004	9	—	—	—
Cheesecake SKU 10006	17	—	—	—
Total			—	—

Click on the 'Save' button to make an Inventory count document, or 'Save & count' to make a document and start the inventory count.

8

Count stock

< Count stock COUNT STOCK EDIT MORE ▾

Count item: _____ Quantity: 1 ADD TO COUNTED

Item	Expected	Counted	Difference	Cost difference
Cake SKU 10003	30	30	0	0.00
Capuccino SKU 10004	9	8	-1	-1.00
Cheesecake SKU 10006	17	16	-1	-2.73
Total			-2	-3.73

SAVE COMPLETE

History ×

- +16 Cheesecake
- +8 Capuccino
- +30 Cake

By clicking on the 'Count stock' button, you can start the counting process.

You can enter the counted quantity in two ways:

1. Search and select the item in the 'Count item' field, specify its quantity, then click 'add to counted'. For your convenience, you can also add it with a barcode scanner by scanning the item barcode as many times as its quantity in stock (each action will be displayed in the history). It may be useful when you count the items by blocks: for example, if there are 10 pieces in one block, you can scan the barcode 10 times or enter the number '10' in the 'Quantity' field.
2. Fill in the quantity of the items in the 'Counted' column.

9

Item	Expected stock	Counted	Difference	Cost of difference
Apple Juice SKU 10001	41		—	—
T-shirt (L / Black) SKU 10001	23	23	0	0.00
Total			0	0.00

If you add an item that is not in the inventory list, either by typing it in in the 'Count item' field or scanning the item barcode, the system will warn you about this with a yellow icon and the message: "This item was not part of your planned count. You can delete it or proceed".

The system automatically saves your count every 30 seconds to prevent data loss.

You can save your count to the document with the 'Save' button to proceed the count later. 'Complete' button will activate the 'Confirm inventory count' window. Click on 'Confirm count' to finish the count.

10

You can save your count to the document with the 'Save' button to proceed the count later. 'Complete' button will activate the 'Confirm inventory count' window. Click on 'Confirm count' to finish the count.

11

Count #	Date created	Date reconciled	Store	Status	Notes
IC1004	Feb 28, 2018	—	Shop	Pending	
IC1003	Feb 28, 2018	—	Shop	In progress	
IC1002	Feb 28, 2018	Feb 28, 2018	Shop 2	Completed	

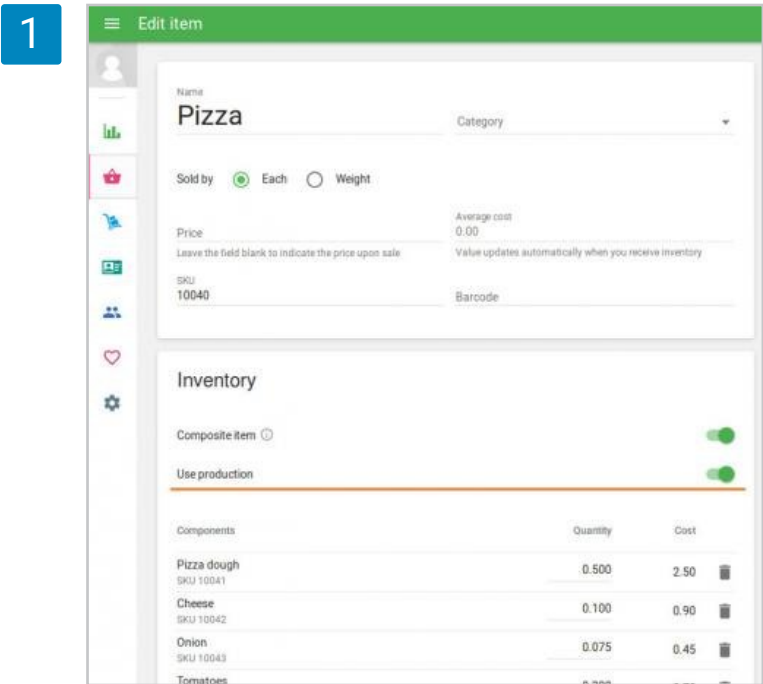
Afterward, the stock of the counted items will be updated according to the count. Inventory counts can have 3 different status: Pending, in Progress, and Completed.

4.7 How to Work with Production

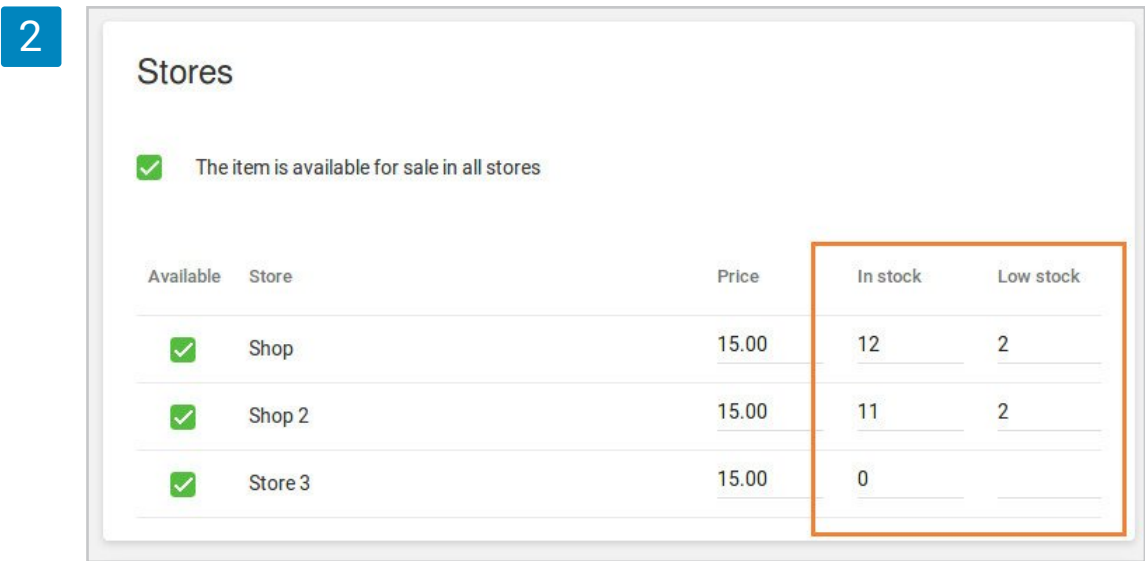
Production is a part of the Advanced inventory management and is available only to those users who have subscribed to this functionality.

The production functionality allows you to keep a record of the inventory of produced items, not just their components. It can be useful for items that are made in advance, not during ordering. For example, in a bakery. Produced items can be moved between stores, its inventory could be adjusted and counted.

The production option is only available for composite items.



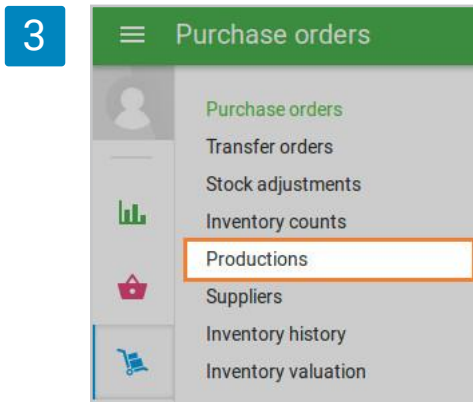
Open the composite item to edit or create a new one. Switch on the ‘Use production’ option in the Inventory section.



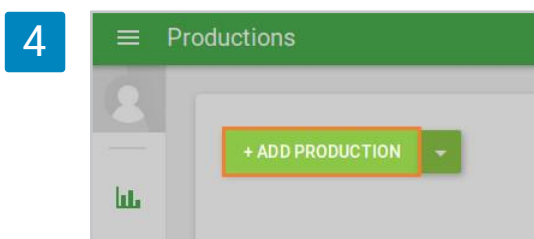
When the option is enabled, the fields ‘In stock’ and ‘Low stock’ will appear in the item form. You can set these values for the composite item manually, and this will not influence the stock of the ingredients.

From now on, the stock of the ingredients will be changed by creating Production or Disassembling (explained later).

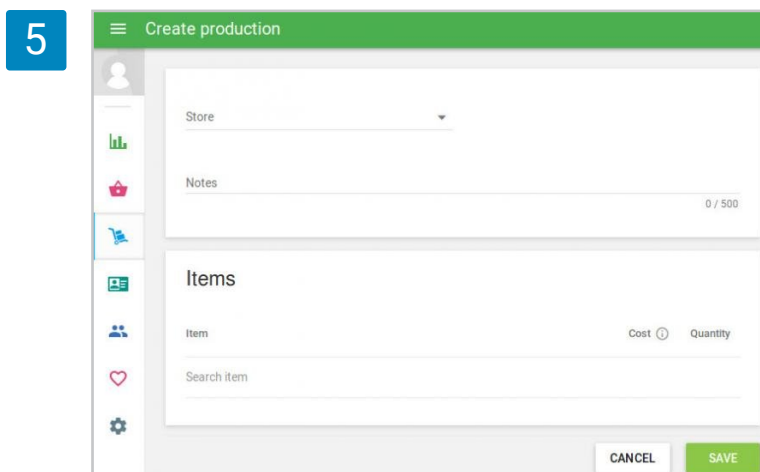
When selling an item with the "Production" option on, the stock of the composite item will be reduced, but not its ingredients.



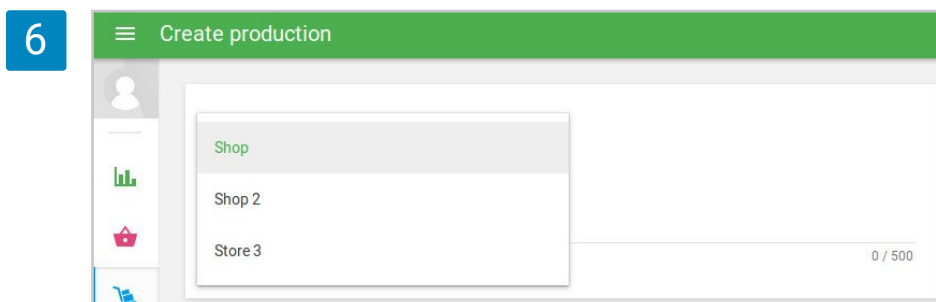
Go to the 'Production' section in the 'Inventory management' menu.



To create a production, click on the '+ Add production' button.



The form 'Create production' will open for editing.



Select the store from the drop-down list where you would like to perform the production. You can also make notes in the 'Notes' field.

7

Items

Item Cost ⓘ Quantity

Search item

Pizza
SKU 10040

CANCEL SAVE

In the 'Items' section, you can find and add items from the list of your composite items in which the production option has been switched on. If you click on the field, a drop-down list of your items will appear, and you can type in the item's name, SKU, or barcode to find the desired item.

8

Items

Item Cost ⓘ Quantity

Pizza
SKU 10040 6.65 12

Coffee 200ml
SKU 10046 0.33 10

Search item

CANCEL SAVE

The 'Cost' field reflects the value that is calculated based on the cost of the components of the item.

Fill in the 'Quantity' field with the quantity of each product that you want to produce. You can add more items to the order in the same way as above.

Click on the 'Save' button to create a production.

Afterward, the stock of the produced composite items will be increased according to their quantity; the stock of the components of the produced items will be decreased based on their use in the produced composite items.

Also, the value of the average cost for each produced composite item will be updated.

9

Production details

< Productions MORE ▾

PR1001

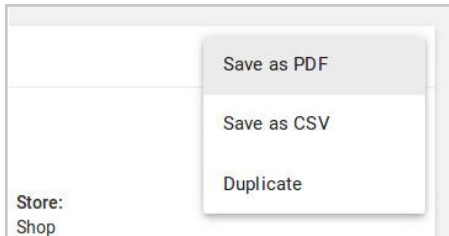
Date created: Mar 21, 2018 Store: Shop
Created by: Owner

Items

Item name	Cost	Quantity
Pizza SKU 10040	6.65	12

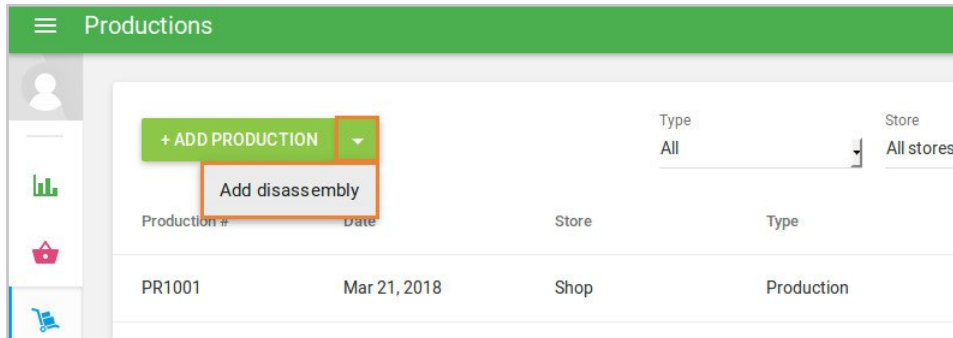
Now you will see the created production document.

10



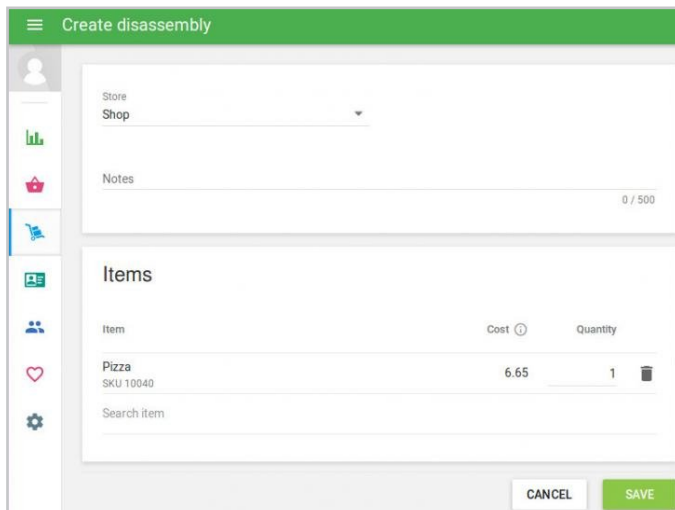
There are operations available with the production document in the 'More' menu: Save as PDF, Save as CSV, and Duplicate.

11



If you want to disassemble the produced composite item, click on the down arrow and select 'Add disassembly'.

12



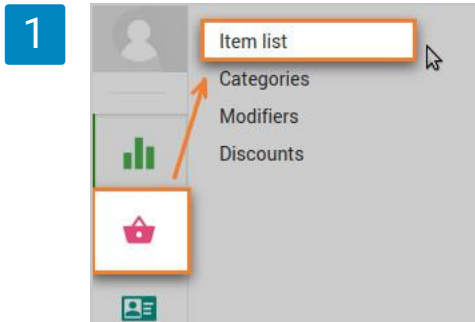
Fill in the 'Create disassembly' form in a similar way as 'Create production'.

After clicking on the 'Save' button, the stock of the disassembled composite items will be decreased by the mentioned quantity and the stock of their components will be increased based on their use in the produced composite items. The cost of the components is also renewed.

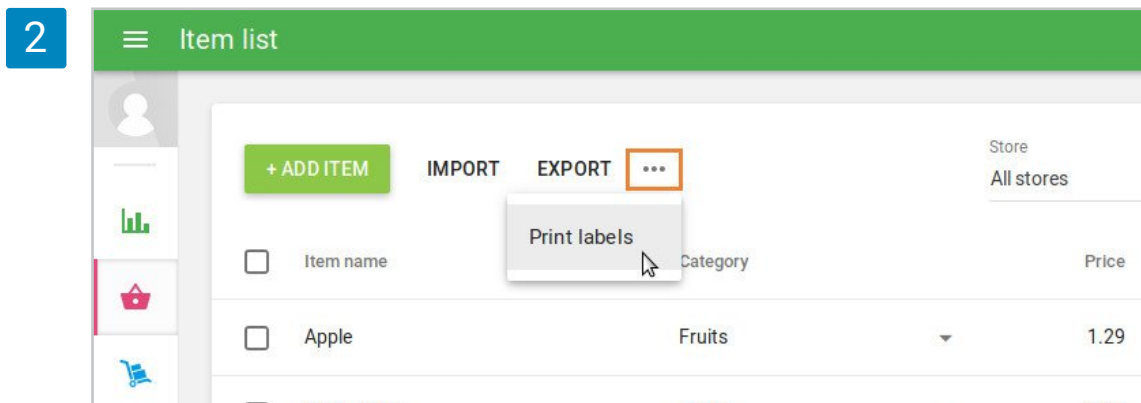
4.8 How to Print Labels for Items

Printing Labels is a part of the Advanced inventory management and is available only to those users who have subscribed to this functionality.

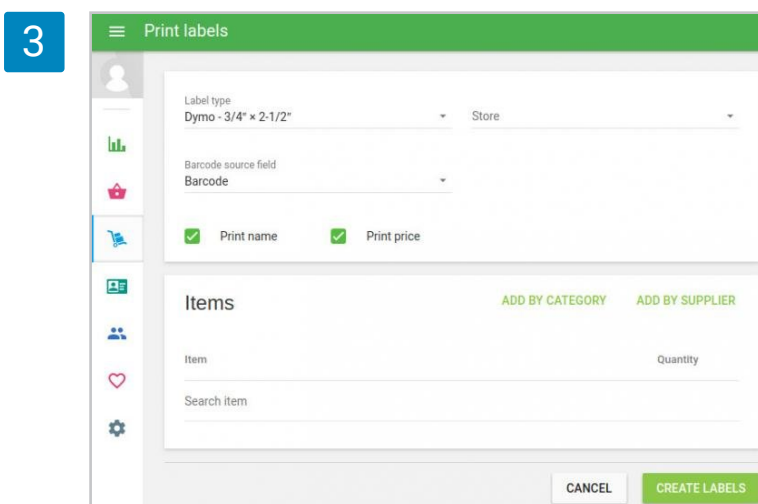
Labels are used to mark the items in the store. The label can contain the item's name, SKU, price, and barcode. Labels with a barcode allow you to use the scanner to add items to the ticket.



Go to the 'Item list' menu in the Back Office.



Click on the 'Print labels' button at the three dots menu.



The form 'Create labels' will open for editing.

4

Print labels

Label type

- Dymo - 3/4" x 2-1/2"
- Dymo - 1" x 2-1/8"
- Dymo - 1-1/8" x 3-1/2"
- Zebra - 1-1/4" x 1"
- Zebra - 2" x 1"

Store

ADD BY CATEGORY ADD BY SUPPLIER

Select a 'Label type' from the drop-down list of predefined printing templates.

5

Print labels

Label type

Barcode source field

- SKU
- Barcode
- None

Store

Select a 'Barcode source field' from the drop-down list of fields: SKU, Barcode, or None. In case of choosing 'None', the labels will not have a barcode.

6

Print labels

Label type

Dymo - 3/4" x 2-1/2"

Store

Shop 2

Barcode source field

Barcode

☒ Print name ☒ Print price

Choose the 'Store' from the drop-down list of your stores, for which you are going to print labels. Select 'Print name' and 'Print price' boxes if you want them printed on your labels. The label will contain the price of the items from the selected store.

The system will remember your choice and suggest these parameters as default the next time.

7

The 'Print labels' interface includes a sidebar with navigation icons. The main area has a header 'Print labels' and a configuration section with dropdowns for 'Label type' (Dymo - 3/4" x 2-1/2") and 'Store' (Shop), and a 'Barcode source field' dropdown (Barcode). Checkboxes for 'Print name' and 'Print price' are both checked. Below this is an 'Items' section with two buttons: 'ADD BY CATEGORY' and 'ADD BY SUPPLIER'. A table lists items with their SKUs and quantities:

Item	Quantity
T-shirt (L / Black) SKU 10028	1
T-shirt (L / Red) SKU 10029	2
T-shirt (L / White) SKU 10027	3
T-shirt (L / Yellow) SKU 10030	4

A 'Search item' input field is located below the table. At the bottom are 'CANCEL' and 'CREATE LABELS' buttons.

In the 'Items' section, create a list of your items for which you are going to print labels. You can add items to the list one by one in the 'Search Item' field, or you can add a whole category by clicking on the 'Add by category' button, as well as adding all items assigned to a certain supplier by clicking on the 'Add by supplier' button.

Fill in the 'Quantity' column with the number of labels you want to print. Then click 'Create labels'.

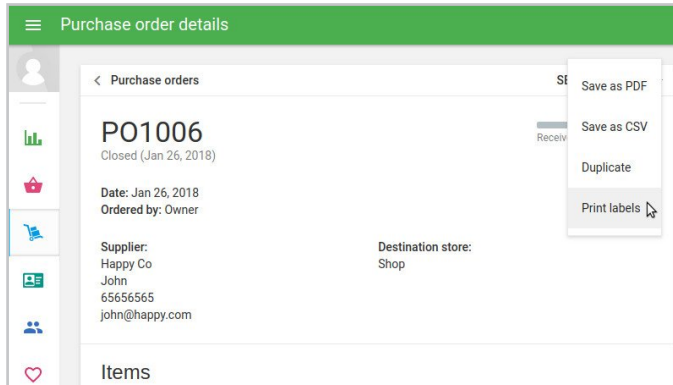
8

The generated HTML page, titled 'Print labels', features a green 'PRINT' button at the top. Below it, four labels are displayed, each for a different t-shirt item. Each label includes the price '20.00', the item name, a barcode, and a small alphanumeric code.

20.00 T-shirt (L / Black) [Barcode] #100280010
20.00 T-shirt (L / Red) [Barcode] #100290011
20.00 T-shirt (L / Red) [Barcode] #100270012
20.00 T-shirt (L / White) [Barcode] #100300013

The generated HTML page with labels will open in a new tab of the browser. You can print the labels on your printer by clicking on the 'Print' button.

3



In the same way, you can print labels from the Purchase order, Transfer order, or Stock adjustment documents.

Open your document and click 'Print labels' in the 'More' menu. The 'Print label' window will open with the items from the document.

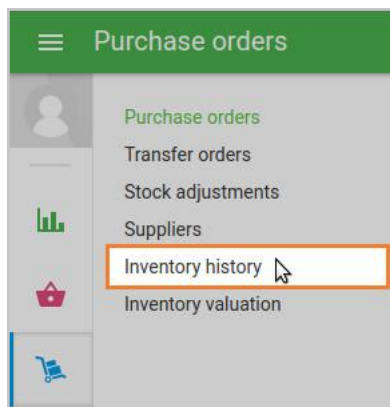
The system will automatically fill in the quantity of labels based on the quantity of items in your document. But you can correct the quantity of labels for each item or remove items which do not need labels.

4.9 Inventory History

Inventory history is a part of the advanced inventory management and is only available to those users who have subscribed to this functionality.

Inventory history allows users to view records of all the changes made in the inventory, including transfers, purchase orders, and adjustments.

1



Go to 'Inventory history' section in the 'Inventory management' menu.

2

Date	Item	Store	Employee	Reason	Adjustment	Stock after
Jan 29, 2018 10:09 PM	Apple Juice	Store 2	Owner	Transferred #T01001	5	35
Jan 29, 2018 10:09 PM	Cake	Store 2	Owner	Transferred #T01001	25	25
Jan 29, 2018 10:09 PM	Apple Juice	candy10store	Owner	Transferred #T01001	-5	5

You can see the 'Inventory history' of all the items that underwent any changes. You can filter the history by period, stores, employees or by reason of stock changes, including sales and refunds.

There is a link to the document for adjustments made on the item in the 'Reason' column.

3

The Advanced inventory also gives you the possibility to see the stock history of items. Click on the 'View history' button in the items form.

4

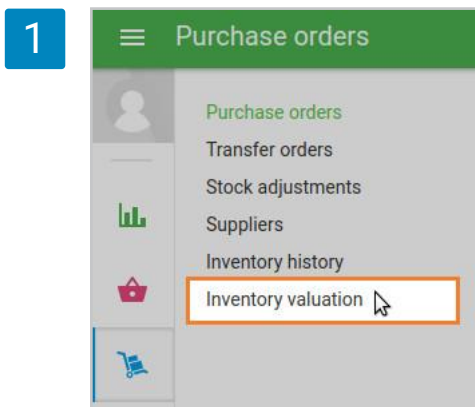
Date	Store	Employee	Reason	Adjustment	Stock after
Apr 18, 2018 4:56 PM	The Coffee	Alex	Recounted #IC1001	1	28
Apr 18, 2018 4:55 PM	Store 2	Alex	Transferred #T01009	12	12
Apr 18, 2018 4:55 PM	The Coffee	Alex	Transferred #T01009	-12	29

You will see all changes in the stock of selected item.

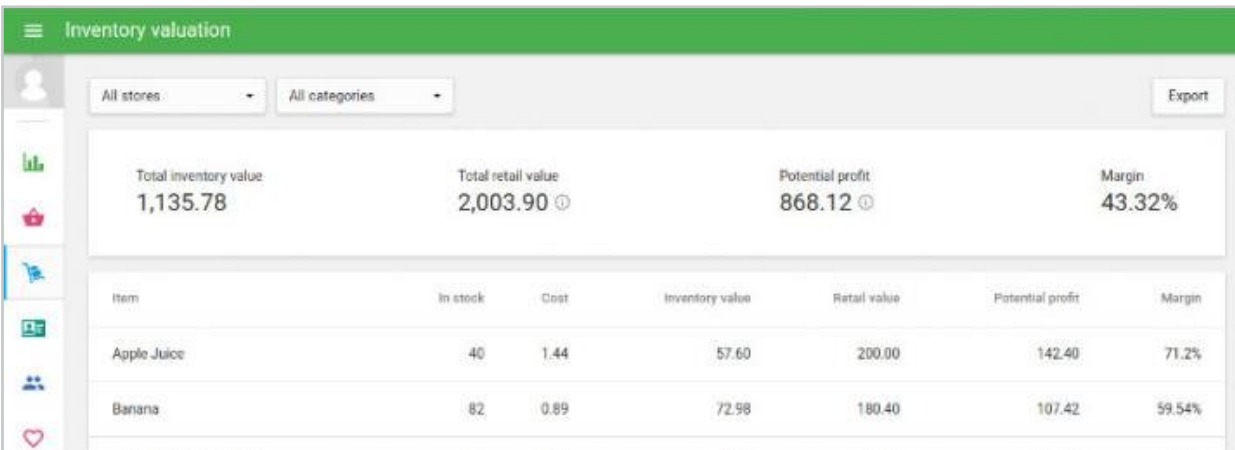
4.10 Inventory Valuation Report

Inventory Valuation Report is a part of the advanced inventory management and is only available to those users who have subscribed to this functionality.

Inventory Valuation Report gives an understanding of the total cost of the inventory and potential profits from their sale.



Go to 'Inventory valuation' section in the 'Inventory management' menu.

A screenshot of the 'Inventory valuation' report interface. At the top, there is a green header bar with the title 'Inventory valuation'. Below the header, there are two dropdown menus: 'All stores' and 'All categories', and an 'Export' button. The main content area displays a summary of inventory information and a table of items.

Total inventory value	Total retail value	Potential profit	Margin
1,135.78	2,003.90	868.12	43.32%

Item	In stock	Cost	Inventory value	Retail value	Potential profit	Margin
Apple Juice	40	1.44	57.60	200.00	142.40	71.2%
Banana	82	0.89	72.98	180.40	107.42	59.54%

You can see the up-to-date 'Inventory valuation' report. You can filter the report by categories or stores (if you have multiple stores) and export the data by clicking on the 'Export' button.

There is a summary of the inventory information at the top.

Total inventory value is calculated as the sum of the cost multiplied by the stock of all items.

Total retail value is calculated as the sum of the price multiplied by the stock of all items.

Potential profit is calculated as the difference between the total retail value and total inventory value.

Margin is calculated as Potential profit divided by the Total retail value in percentage.

You can also see the detailed inventory information of each item.

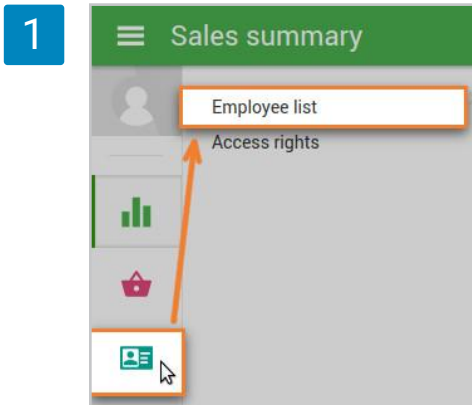
Note

- Items with a negative stock are not calculated in the Total inventory value.
- Items with a negative stock or a variable price (blank price field) are not calculated in Total retail value and Potential Profit.

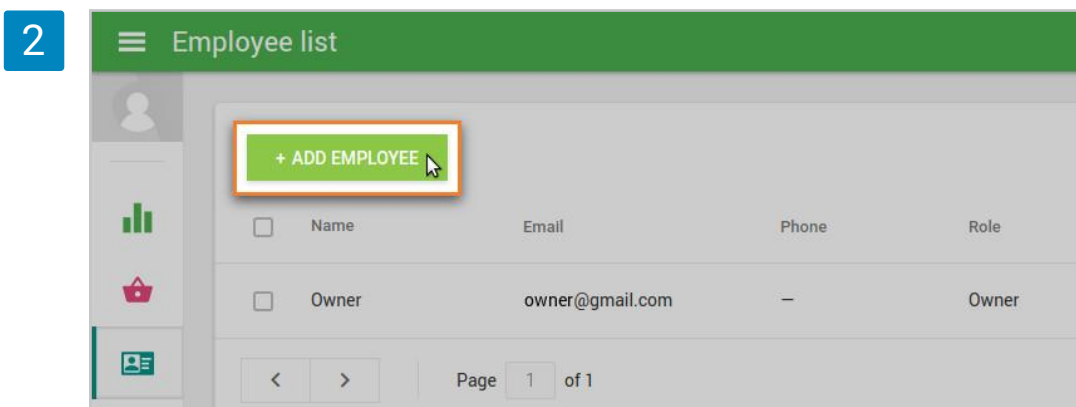
5. Employees



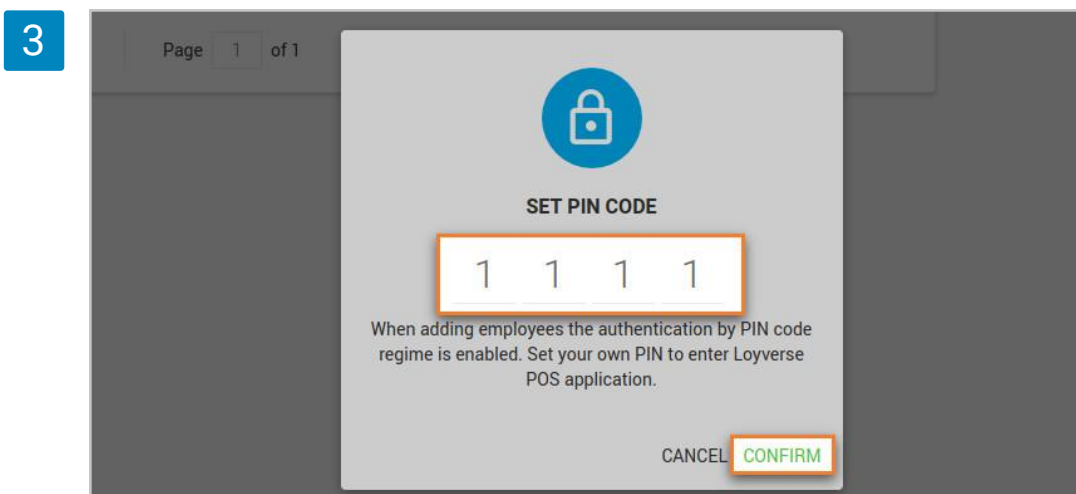
5.1 How to Add an Employee in Loyverse POS



After logging in to Back Office, go to the 'Employee list' in the 'Employees' section.



Click on the 'ADD EMPLOYEE' button.



When you add a new employee for the first time, as a shop owner, you will be asked to set your PIN code. After your PIN code as an owner is set, you will not be asked for this again.

4

Then you can add an employee into the system.

You can put the employee's name, email address, phone number and their role: cashier, manager or administrator.

5

After creating your four digit PIN number, click 'SAVE'.

6

If you have multiple stores you can manage your employee access to them. For this, at the bottom of the form find the 'Stores' line and click on the down arrow.

7

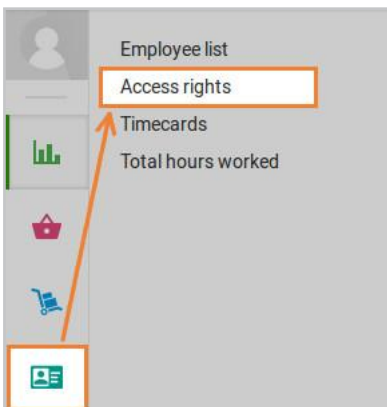
Afterwards, an additional window will slide down with the list of your stores. You can assign your employee to a particular store. Don't forget to save changes.

Nice! You have now added an employee to Loyverse POS and they will be able to sign in for work on their mobile device.

5.2 How to Manage Access Rights of Employees

The owner can give employees different access rights to the POS app (Play Market or App Store) and the Back Office. To do this, you can set up the users' roles by assigning them to a certain group.

1



Enter the Back Office and open the 'Access rights' section in the Employee menu.

2

Role	Access	Employees
<input type="checkbox"/> Owner	Back office and POS	1
<input type="checkbox"/> Administrator	Back office and POS	1
<input type="checkbox"/> Manager	Back office and POS	1
<input type="checkbox"/> Cashier	POS	2

You can see the user groups with their roles. By default, there are four user groups with preset roles: Owner, Administrator, Manager, and Cashier. You can create a new group by clicking on the 'Add group' button.

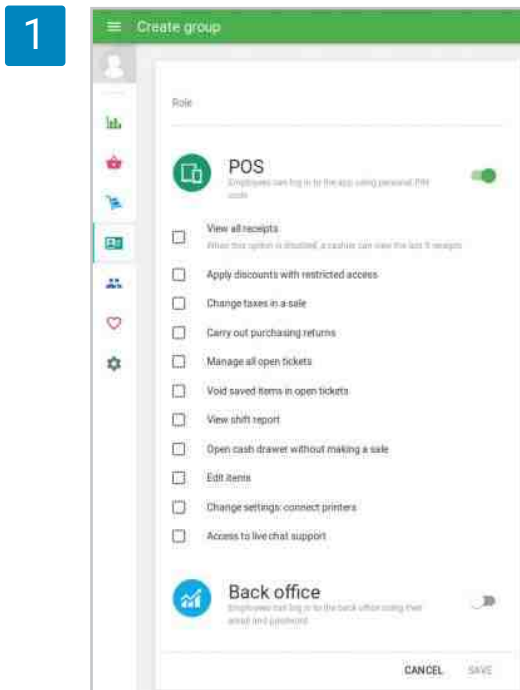
The owner has all the possible rights, which cannot be changed. All other groups can be edited.

You can assign a role to the employee during creation or change the role of existing employees.

There are two blocks of access rights: POS and Back office.

You can create a new group by clicking the '+ Add group'. The right to access POS is turned on by default and the right to access the Back office is disabled.

5.2.1 POS Access Rights



Fill in the Name field of a new role. Note that there cannot be two access groups with the same role name.

You can assign the access rights to the group using the checkbox.

View all receipts

When this option is disabled, the employee can only view the 5 most recent receipts. You can use this access restriction to forbid your employees to see and make refunds for older receipts. See details in Receipts List in the POS.

Apply discounts with restricted access

When this option is disabled, the employee does not have the right to use the restricted discounts. See details in How to Create and Configure Discounts.

Change taxes in a sale

When this option is disabled, the employee cannot not change taxes, applied to the items during sale.

Carry out purchasing returns

When this option is disabled, the employee cannot make refunds. Such an employee would not have the 'Refund' button in the edit receipt window in the Receipts section of the POS. See detail in [How to Issue a Refund on Loyverse POS](#)

Manage all open tickets

If enabled, the employee can view and edit open tickets created by other employees.

Void saved items in open tickets

Deselect if you want to forbid your employees from deleting saved open tickets or deleting items from them. See details in [Open tickets](#)

View shift report

You can select whether the employee can see the shift report with the expected amount of cash or not, during and when closing shift. See details in [Shift Management in Loyverse POS](#)

Open cash drawer without making a sale

If enabled, the employee will have the 'Open cash drawer' button in the menu at the Sale screen of POS. See details in [How to Connect a Cash Drawer](#)

Edit items

If enabled, the employee can add and edit items and categories in the POS. See details in [How to Add Items in the Loyverse Back Office](#)

Change settings: connect printers

Employees with this right can access the Settings at the POS, where it is possible to connect printers, CDS, and KDS.

Access to live chat support

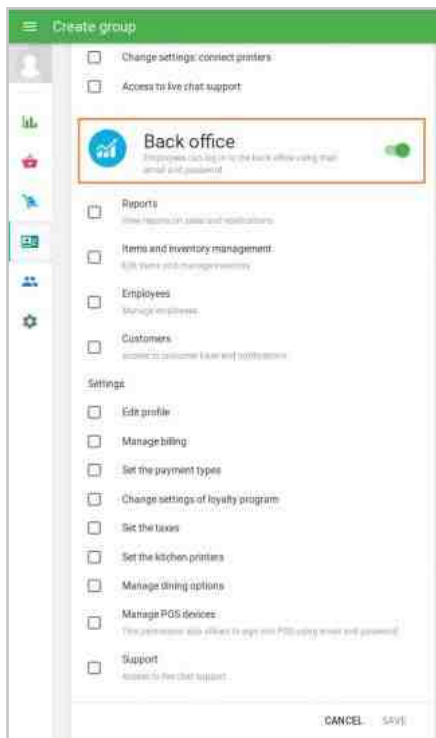
Employees with this right can access the chat support.

When an employee tries to access a function on the POS that they do not have the access to, the PIN-panel will be opened with the request to enter the PIN. After entering the PIN code of an employee who has access to the function, a one-time access is granted to the employee who does not have access to the function.

5.2.2 Back Office Access Rights

1

If you want to give the user group an access to the Back Office, switch on the Back Office in the form. After that, you will see the list of access rights to the Back Office.



The first 4 access rights (Reports, Items, Employees, Customers) opens access to the corresponding sections of the Back Office.

There is a separate block of access rights for the Settings section.

Edit profile

Gives employees the right to access the Profile section in Settings.

Manage billing

Gives employees the right to access the Billing section.

Set the payment types

Gives employees the right to access the Payment types section.

Change settings of loyalty program

Gives employees the right to access the Loyalty section in Settings.

Set the taxes

Gives employees the right to access the Taxes section in Settings.

Set the kitchen printers

Gives employees the right to access the Kitchen printers section in Settings.

Manage dining options

Gives employees the right to access the Dining options section in Settings.

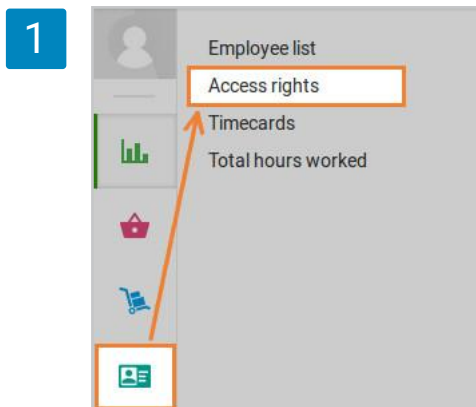
Manage POS devices

Gives employees the right to access the POS devices section in Settings.

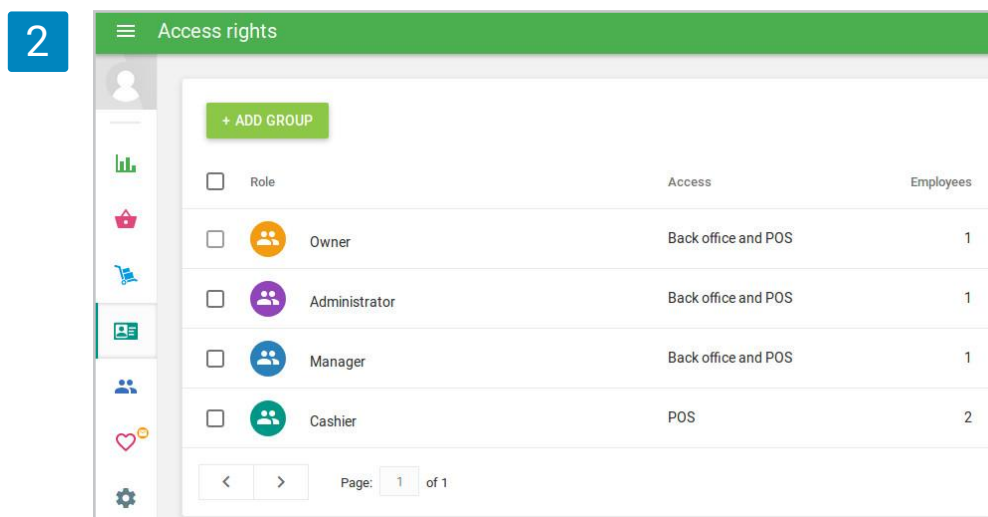
This permission also allows them to sign into POS using email and password. See details in [How to Give Employees Access to Login into Loyverse POS through E-mail](#).

5.3 How to Give Employees Access to Login into Loyverse POS through E-mail

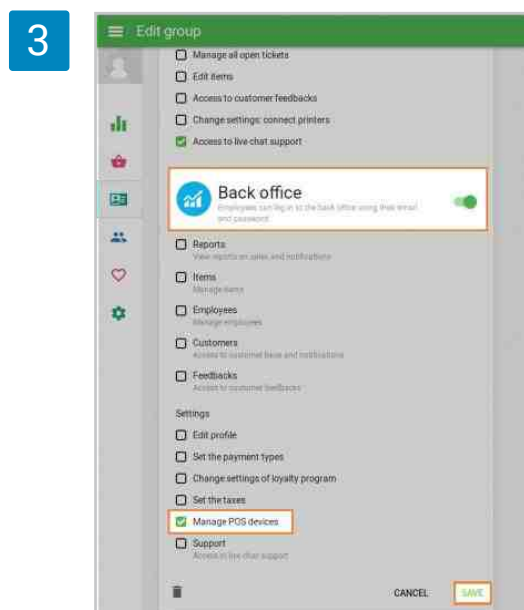
5.3.1 Make Access Rights for Group



Go to 'Access rights' menu at 'Employee' section in the Back Office.

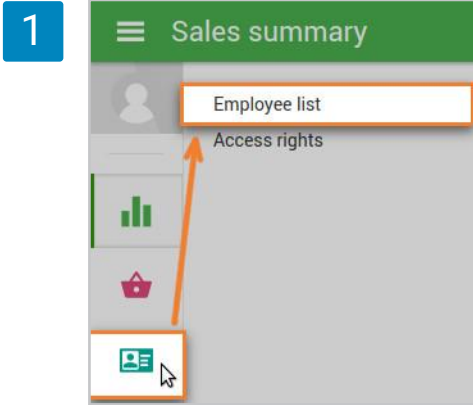


Choose an existing group with your employees or create a new group.

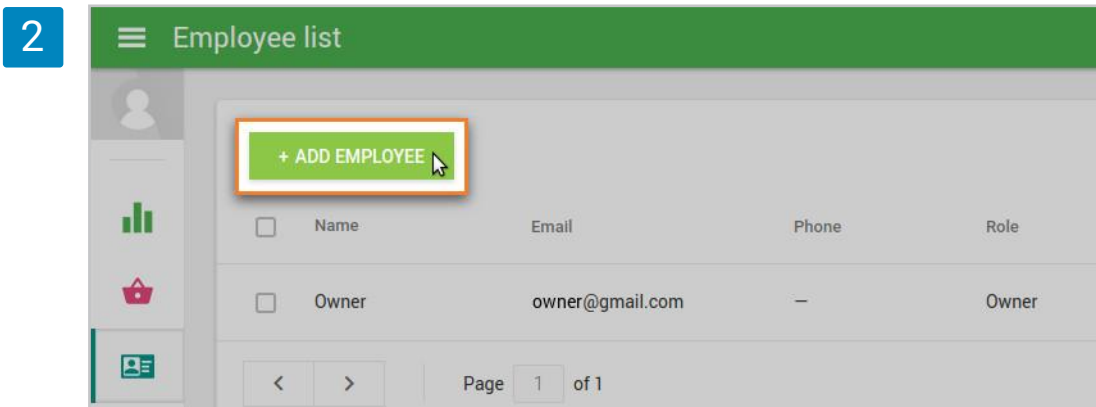


Switch on 'Back office' option and check in box 'Manage POS devices'.

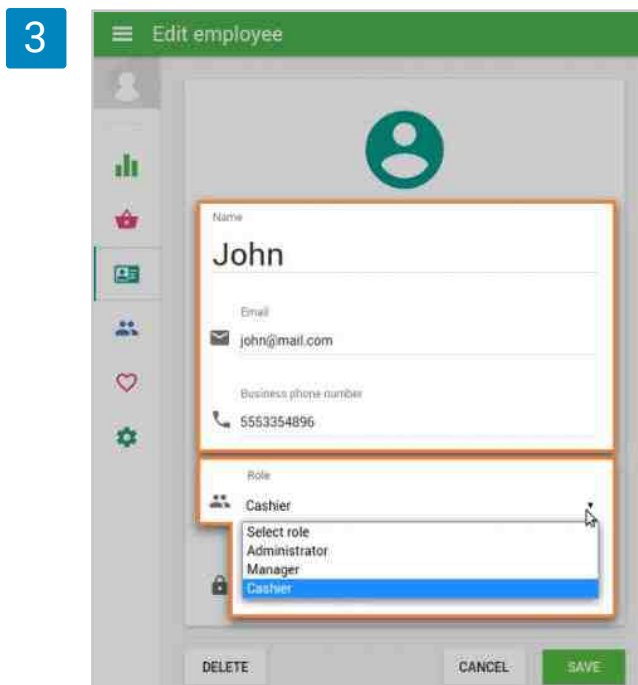
5.3.2 Assign Employee to the Group



Go to the 'Employee list' in the 'Employees' section.



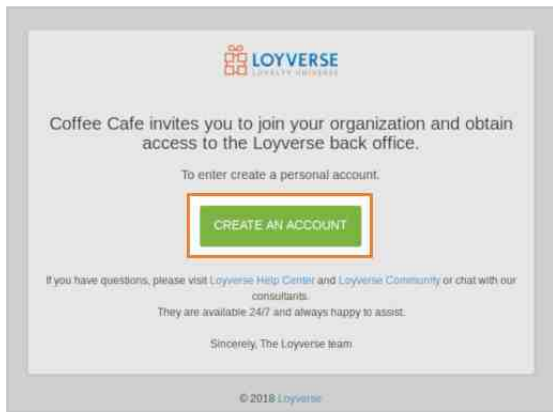
Create Employee by clicking on the 'ADD EMPLOYEE' button. If you have created employee before, open it for editing.



At the 'Edit employee' window fill in employee's name, email address, phone number and the role (the group that you created in the first step).

5.3.3 Creating Password by Employee

1



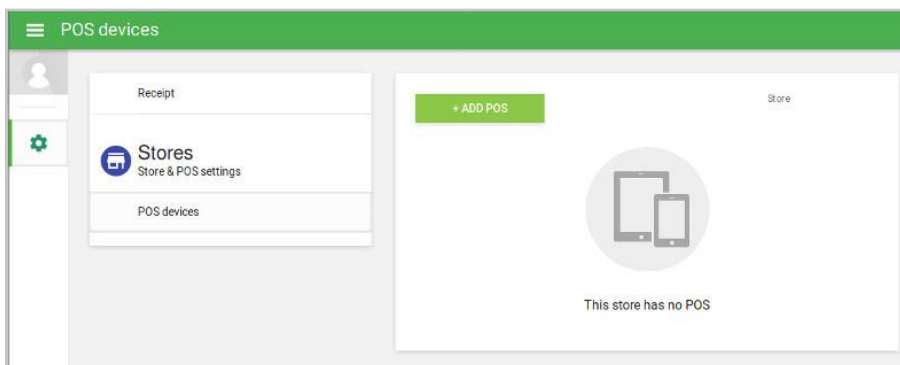
The employee will receive Email with an invitation to obtain access to the Back Office. He or she should click the 'Create an account' button.

2

This is a screenshot of the "Create a Loyverse account" form. It has the Loyverse logo at the top. The form fields are: "Email" with the value "john@mail.com", "Password" with masked characters, and "Password again" with masked characters. There is a green "CREATE AN ACCOUNT" button at the bottom. At the very bottom, there is a language selector set to "English".

The employee will be redirected to the Back office form, so he/she has to fill in a password to create an account.

3



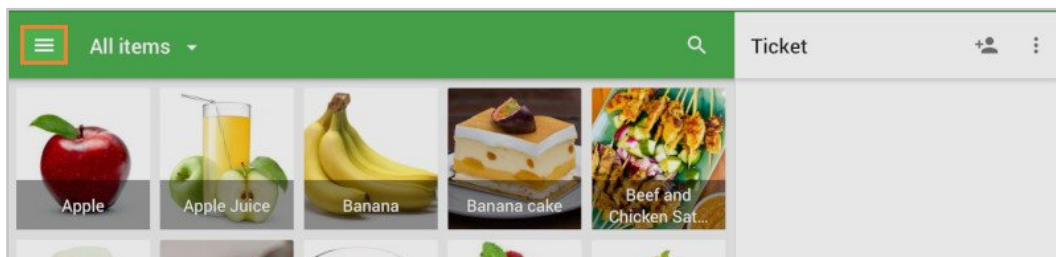
If you don't assign to this employee group any other access rights, then your employee will not see and manage any other information in the Back Office except POS devices.

5.3.4 Login into Loyverse POS

Now an employee can login into Loyverse POS at the mobile device with his/her E-mail and password, created at the previous step.

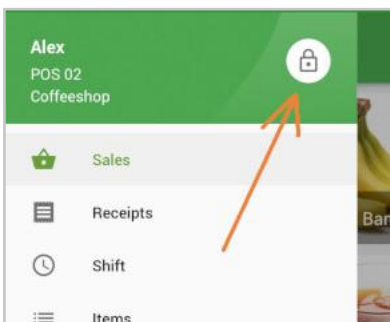
5.4 How to Switch User Account to Different Employee in the Opened Loyverse POS

1



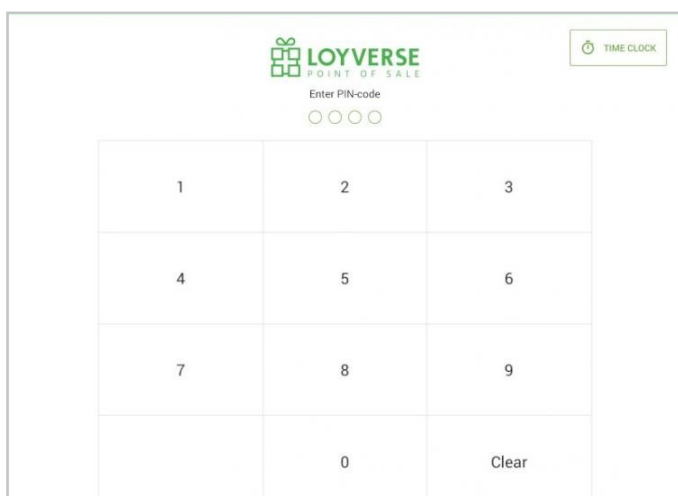
If you want to switch the user account to another employee in an already opened Loyverse POS app (Play Market or App Store) without exiting, you need to go to Menu.

2



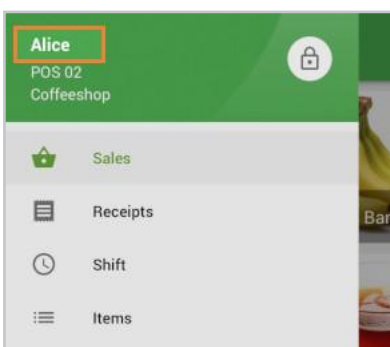
Then, tap on the lock icon.

3



The form 'Create transfer order' will open for editing.

4

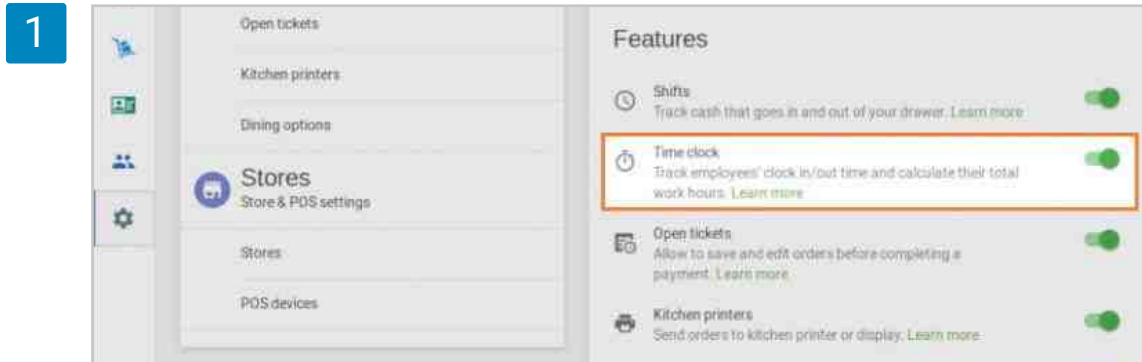


The active app account has switched to another user, and you can see his or her name on the menu header.

5.5 Using Time Clock to Track Employees Hours

This feature allows employees to clock in/out and calculates their total work hours.

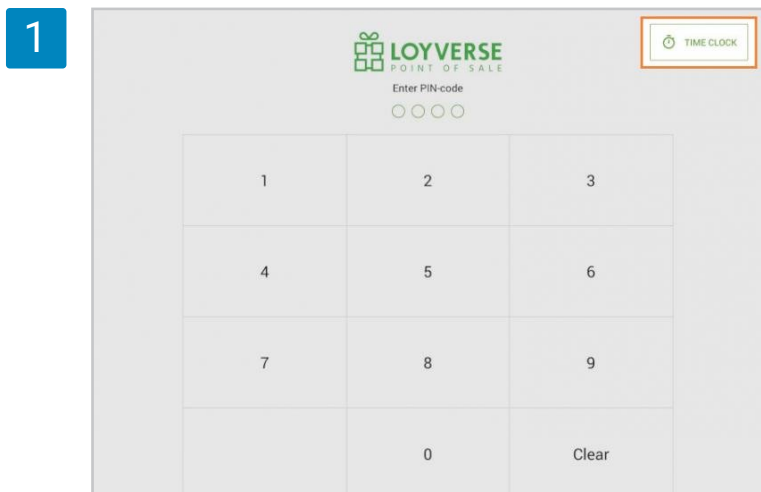
5.5.1 Configuration



Login to the back office, navigate to the Settings menu, scroll to General Settings and switch the 'Time clock' slider on.

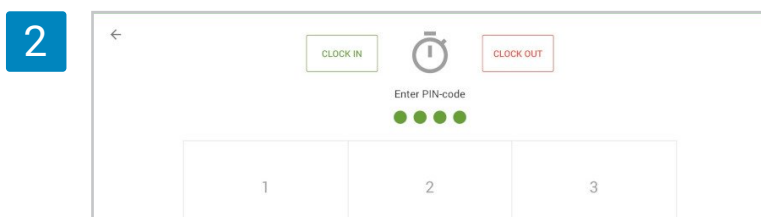
The time clock feature requires authentication by PIN. Set your PIN to enter Loyverse POS app if you have not.

5.5.2 Using at POS

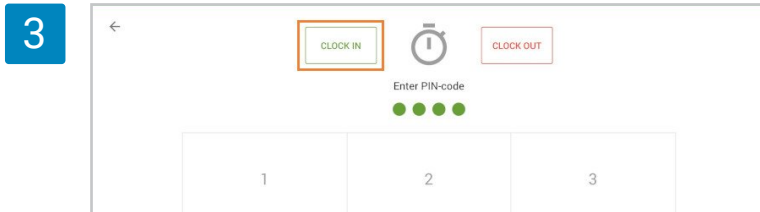


At the Loyverse POS app tap the 'Time clock' button in the top right of the login screen.

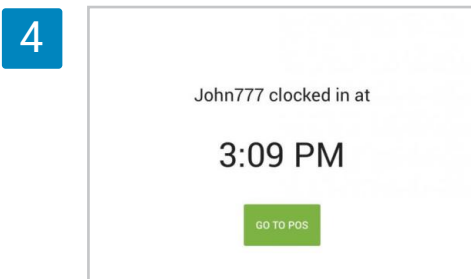
Enter PIN-code on the number pad.



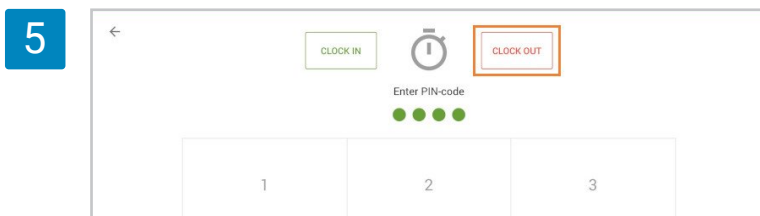
Then 'Clock In' and 'Clock Out' buttons become active.



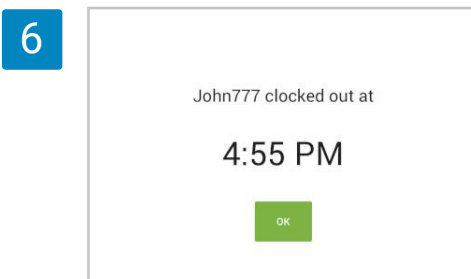
Tap 'Clock In' button to start tracking hours and record a time punch.



Tap to 'Go to POS' button to go to the sale screen of the app or back arrow to come back to login screen.

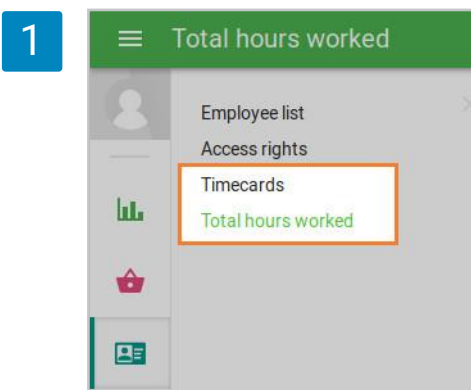


After finishing work go to 'Time clock' screen, tap 'Clock Out' button to record a time punch.



Then you will see information about clock out time.
Tap to 'OK' button.

5.5.3 Reports at the Back Office



There are two sections in 'Employees' menu connected to Clock in/Clock out option: 'Timecards' and 'Total hours worked'.

2

Employee	Store	Total hours
Alex	The Coffee	7
John	The Coffee	25.08
Total		32.08

'Total hours worked' section shows summary report of each employee in the chosen period.

3

Clock in	Clock out	Employee	Store	Total hours
Oct 26, 2017 8:13 PM	Oct 26, 2017 8:26 PM	John	The Coffee	0.22
Oct 26, 2017 5:48 PM	Missing	John	The Coffee	-
Oct 26, 2017 5:11 PM	Oct 26, 2017 5:48 PM	John	The Coffee	0.62

At the 'Timecards' section you can see the list of timecards.

4

Employee: Alex

Clock in date: Oct 26, 2017 Clock out date: Oct 26, 2017

Clock in time: 03:00 AM Clock out time: AM

Total hours:

CANCEL SAVE

You can correct the current timecard or create a new one by clicking on 'Add Timecard' button. Total hours are automatically calculated based on clock in and clock out time.

Note

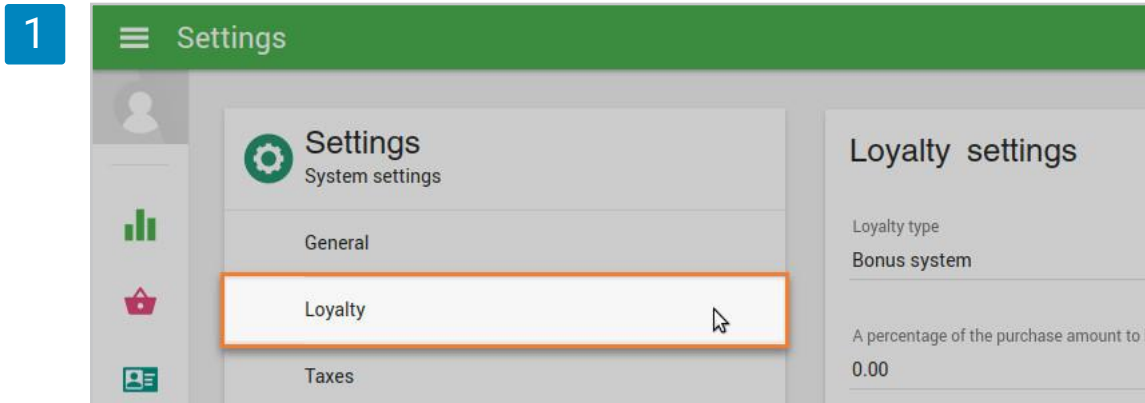
The decimal in 'Total Hours' shows a fraction of an hour, not minutes.

6. Customers

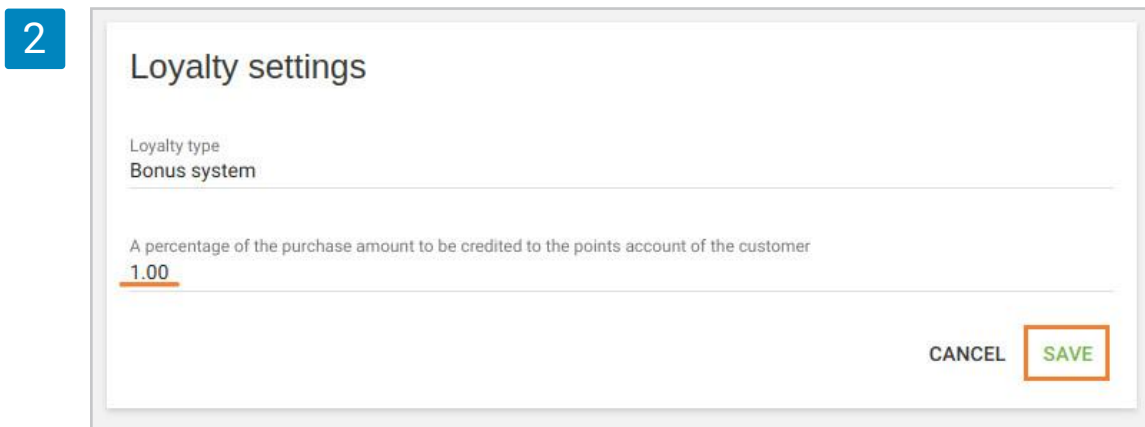


6.1 How to Set Up a Customer Loyalty Program

Loyalty programs motivate customers to make recurring purchases as they create the opportunity for you to take customer relationships to greater depths and also reward their visits with bonus points.



To set up the reward program, login to the Back Office. Then in the Settings menu, click the 'Loyalty' button.



A basic program offers 1 point for 1% of the amount spent, but of course, you can modify the percentage according to your preference. Don't forget to press 'Save'.

Your loyalty program is ready to go! All you need now are some customers! They'll be happy to know they can now collect bonus points at their favorite small business.

Your store is well on its way to success!

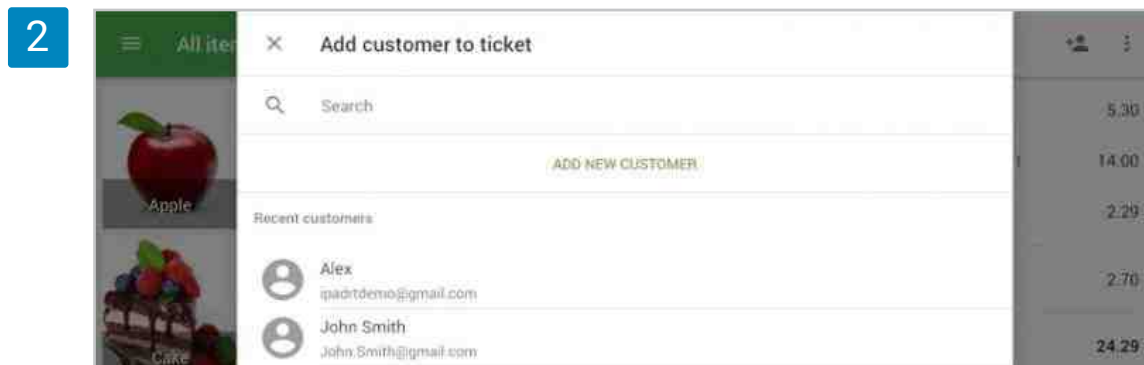
6.2 How to Sign Up a Customer in Loyverse POS

Loyverse POS app provides you with the possibility of connecting sale records with customers. It allows you to send receipts to customers via email. If you have already set up the loyalty program, you can give bonus points to registered customers for every purchase, to be redeemed for discounts.

When making sales in the Loyverse POS app (Android, iOS), you can sign up a new customer.



Click the 'Add client' icon at the top right-hand corner of the sale screen.

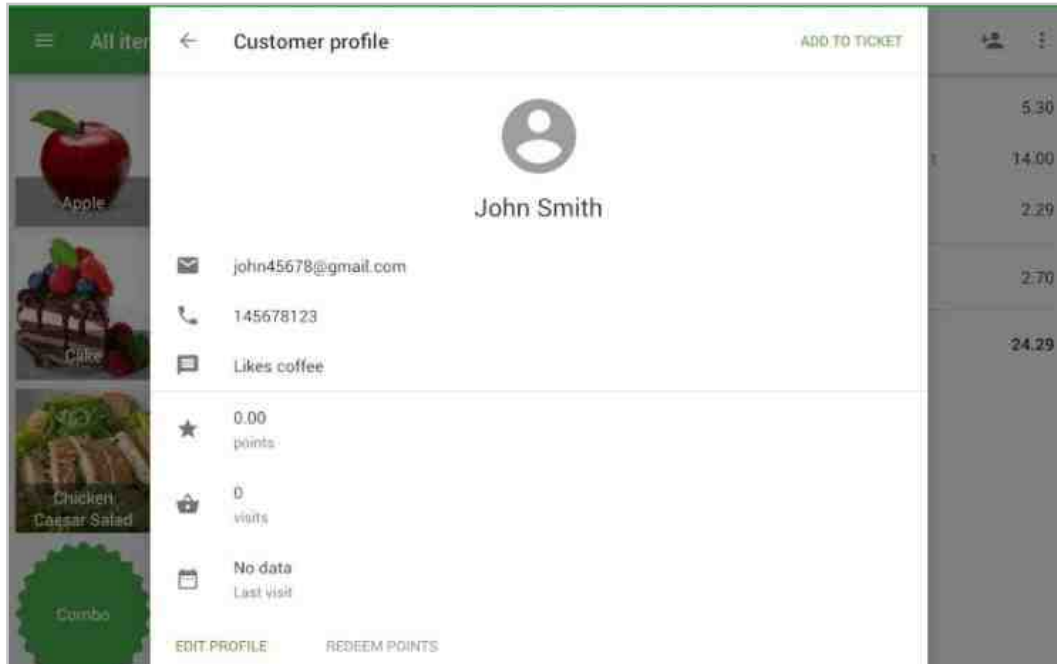


In the pop-up window, you can select the existing customer or add a new one by clicking on 'Add new customer'.



If you add a new customer, fill in the 'Create customer' form. Enter your customer's Name, Email, Number, and Note. The main identifier of customers is the email, so it is an obligatory field together with the Name. Number and Note sections are optional. Tap 'Save'.

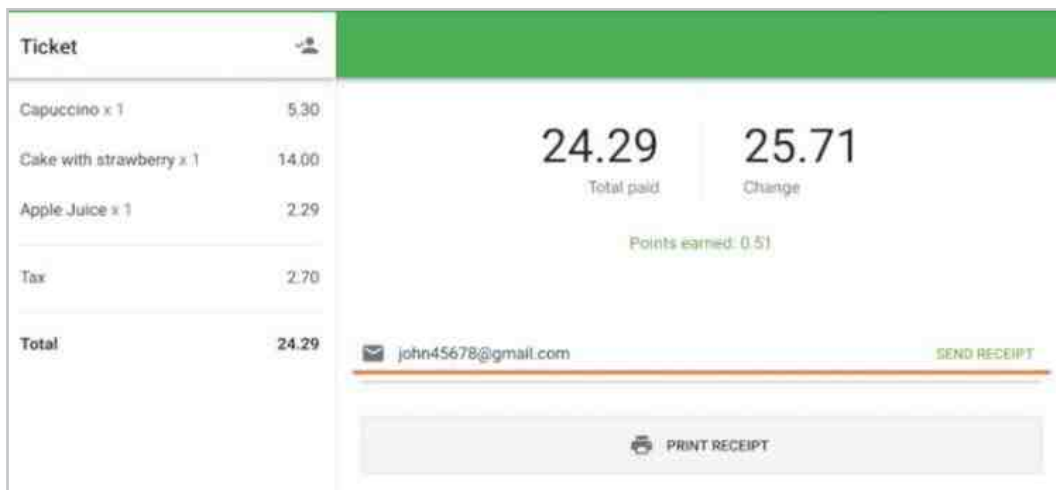
4



Check the information about your customer and tap 'Add to ticket' at the top-right hand corner.

After the customer is signed up, proceed with your sales as usual.

5



Then in the window after choosing the payment type, you will see a customer's email. Tap 'Send receipt' button to send the receipt to the customer via email.

Tap the 'New sale' button to return to the sale screen.

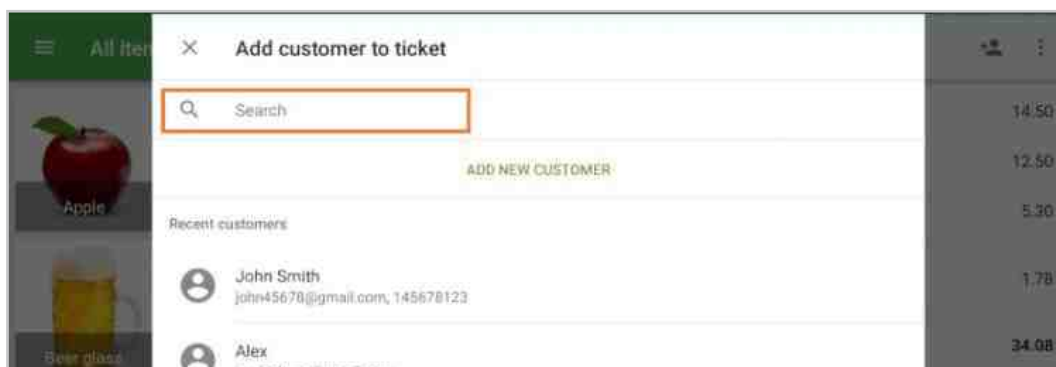
6.3 How to Redeem Customer Points for a Discount

1



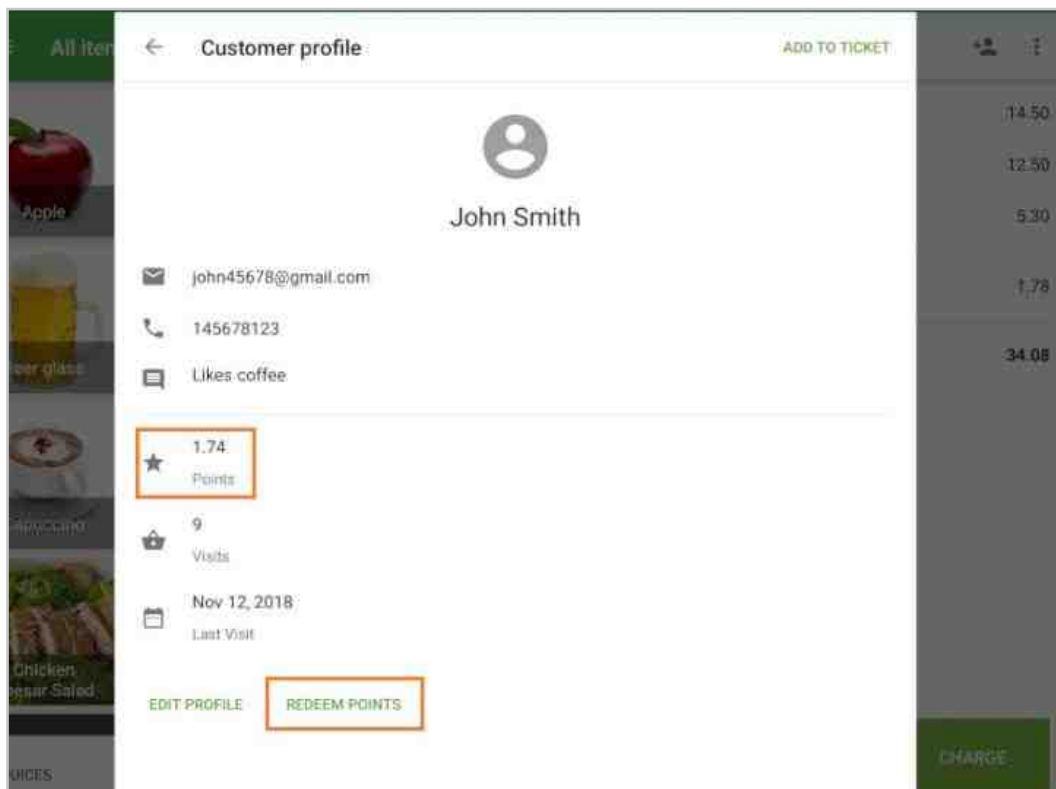
At the sale screen, add items to the ticket and click the 'Add client' icon at the top right-hand corner of the sale screen.

2



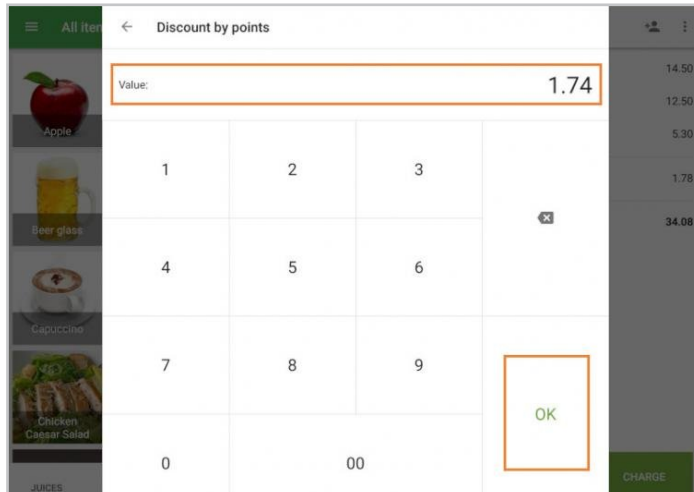
In the pop-up window, select the existing customer from the list of recent customers. You can use the search field to find the customer by name, email or number.

3



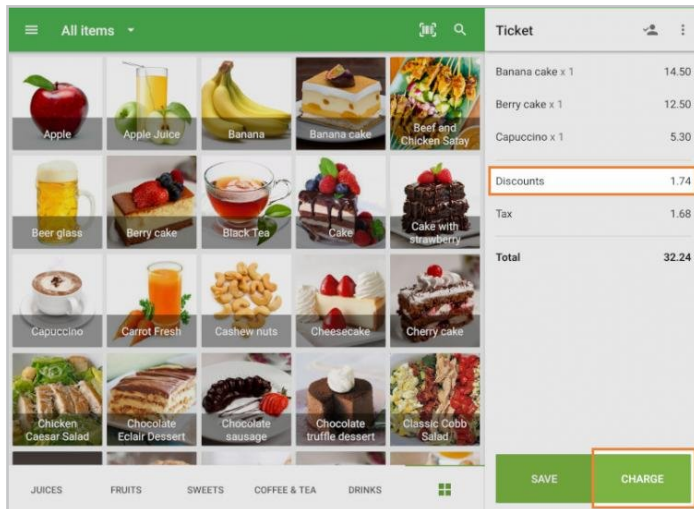
After you have selected the customer, you can see his/her profile with the number of points available for redemption. Tap 'Redeem points'.

4



The app will show you the maximum redeemable value. But as clients wish, you can enter a lesser amount using the number pad. After tapping 'OK', the points will be applied and the purchase amount will be reduced.

5



Then you'll see the receipt preview with the redeemed points in the discounts line. Tap 'Charge' to continue the sale as usual.

6.4 How to Send E-mail with Receipt to Client in Loyverse POS

After you enter the payment to receipt during sale, you can send a receipt to a customer by email.

1

Ticket	
Dine in	
Chocolate truffle dessert x 1	8.50
Croissant x 1	2.25
Cream cake x 1	8.50
Tax	1.93
Total	21.18

21.18
Total paid

0.00
Change

Enter email SEND RECEIPT

PRINT RECEIPT

NEW SALE

Fill in the 'Enter email' field and tap 'Send receipt' button.

Please be attentive while entering the Email. If you make a mistake, the customer will not get the receipt.

2

Ticket	
Dine in	
Chocolate truffle dessert x 1	8.50
Croissant x 1	2.25
Cream cake x 1	8.50
Tax	1.93
Total	21.18

21.18
Total paid

0.00
Change

Receipt sent to email

PRINT RECEIPT

NEW SALE

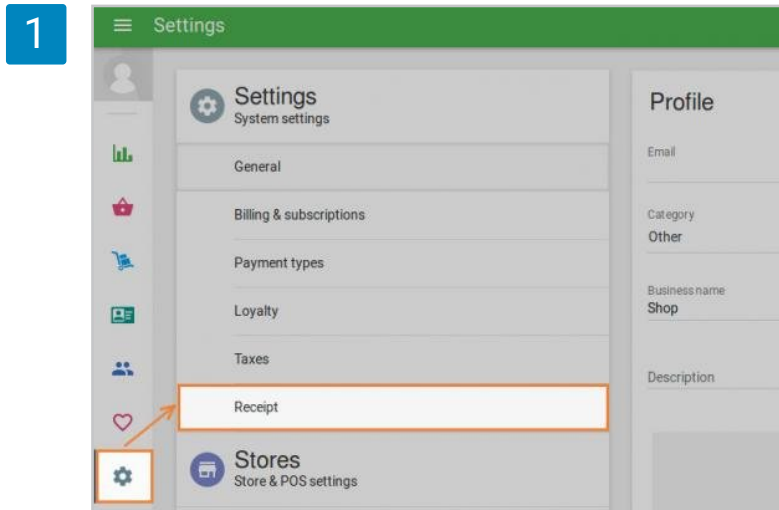
After you see the message 'Receipt sent to email', you can proceed to a new sale.

Note

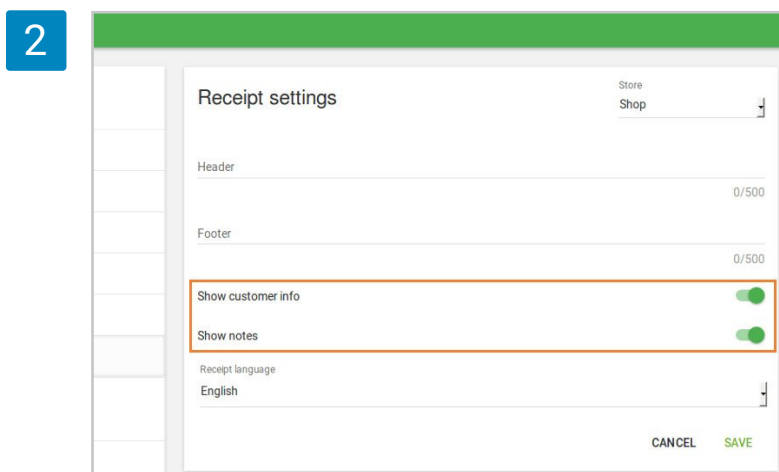
The E-mail entered for sending the receipt will not be saved in the customer base.

6.5 Information about the Customer and Notes in the Receipt

These settings only affect the display of information on the receipts for the clients, such as printed receipts, email receipts and do not affect the format of receipts in the archive in POS and in the Back Office, where customer information and notes are always displayed.

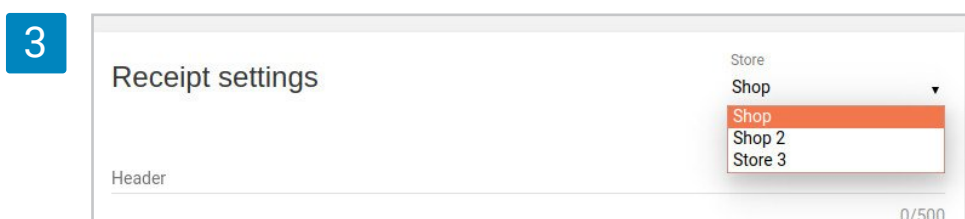


Go to the 'Receipt' section in the 'Settings' menu in the Back Office.



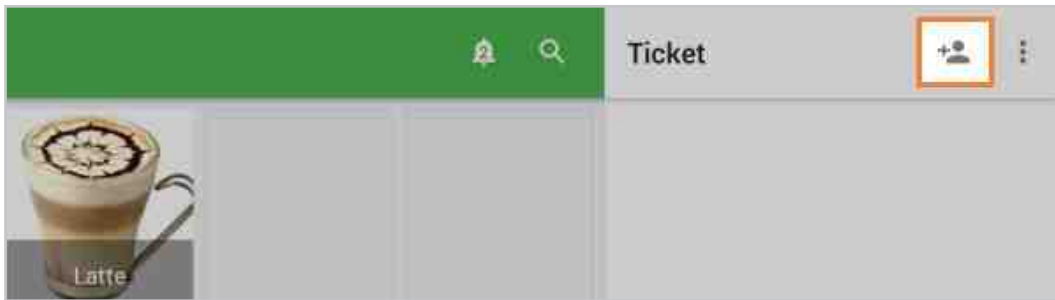
In the Receipt settings, switch on the 'Show customer info' option if you want to display the information of your registered customers on the receipts.

Switch on 'Show notes' option if you want to display the comments of the items and the ticket on the receipts.



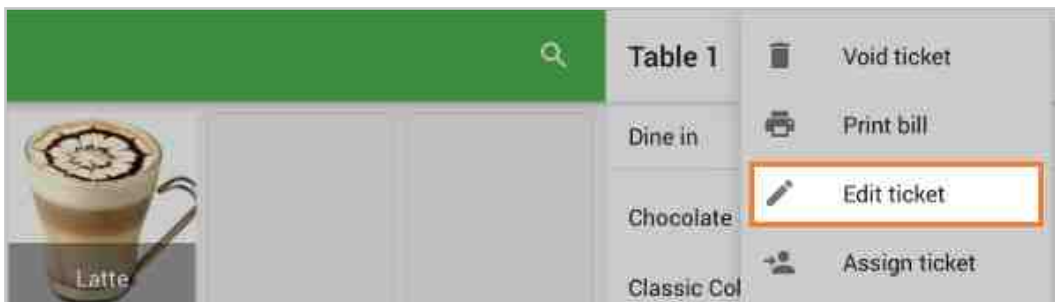
If you have several stores, you have to make these settings for each store by selecting the store's name from the drop-down list and saving changes.

4



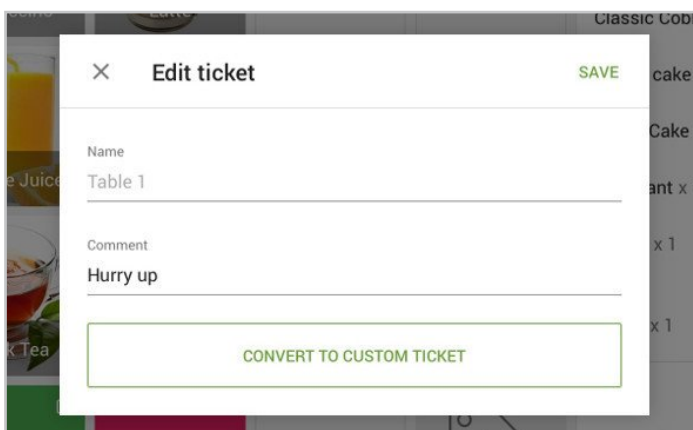
Now, during the sale, when you register a new customer or assign a ticket to an existing customer, the customer name and number will be printed on the receipt.

5



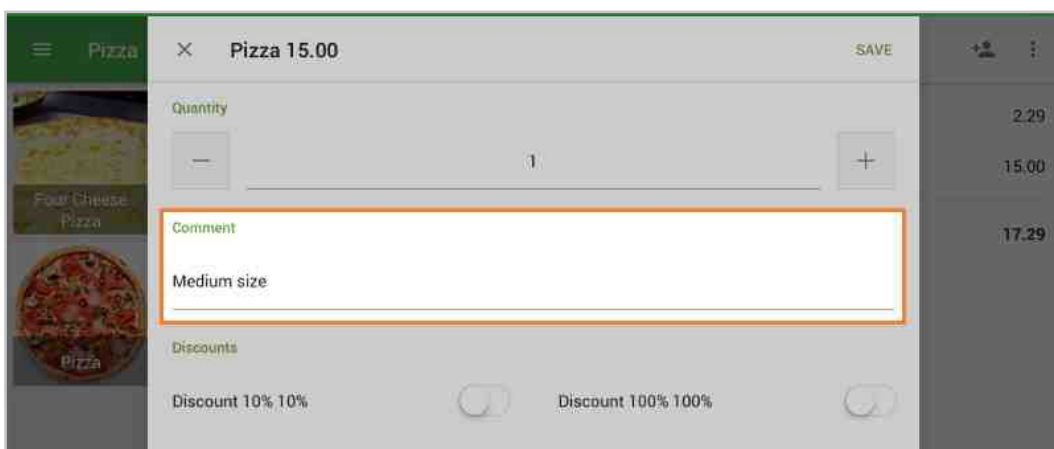
You can add comments to the open ticket by tapping on the 'Edit ticket' button under the menu (:).

6



Type in the comment on the pop-up window and tap 'Save'.

7



To add a comment to the item, click on the item in the ticket. Fill in the comment field in the pop-up window and tap 'Save'.

Shop	
Cashier: Owner	
POS: POS 1	
Customer: John	
777564321	
<hr/>	
Hurry up	
<hr/>	
Apple Juice	2.29
1 x 2.29	
Pizza	15.00
1 x 15.00	
Medium size	
Coffee 200ml	1.60
1 x 1.60	
1 sugar stick	
<hr/>	
10%	-1.50
<hr/>	
TOTAL	17.39
Cash rounding	0.39
Cash	50.00
Change	33.00
<hr/>	
3/28/18, 1:43 PM	#1-1036

The Information about the customer (Name and Number) and notes (comment to the open ticket and comments to the items) will appear on the receipt.

Note

The item comments will be displayed on the return receipt, but the ticket comments will not.

6.6 Customer Identification by Number

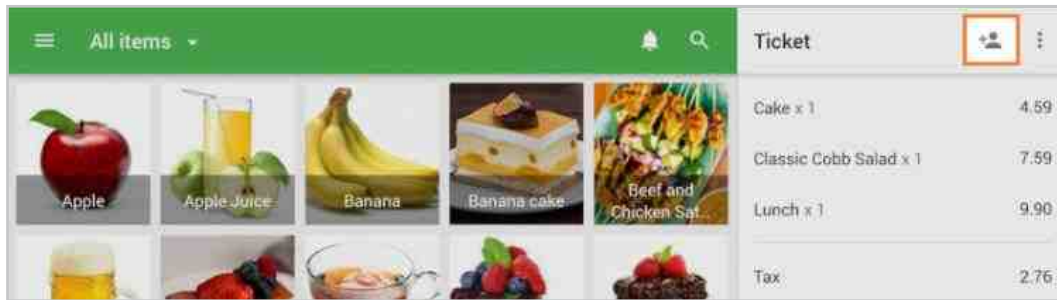
If you specify a customer's number when you sign up a customer in Loyverse POS, you can identify your customer by their number during a sale.

Note

For customer registration, it may be enough to fill only one of the three fields: 'Name', 'Number' or 'Email'. But sometimes, the customer's name is not unique. If you create multiple clients with the same name, it will be difficult to find the correct one. Therefore, we recommend you to fill in the fields 'Number' or 'Email' as well.

The number can be any combination of numbers that are easy to memorize for the client.

2



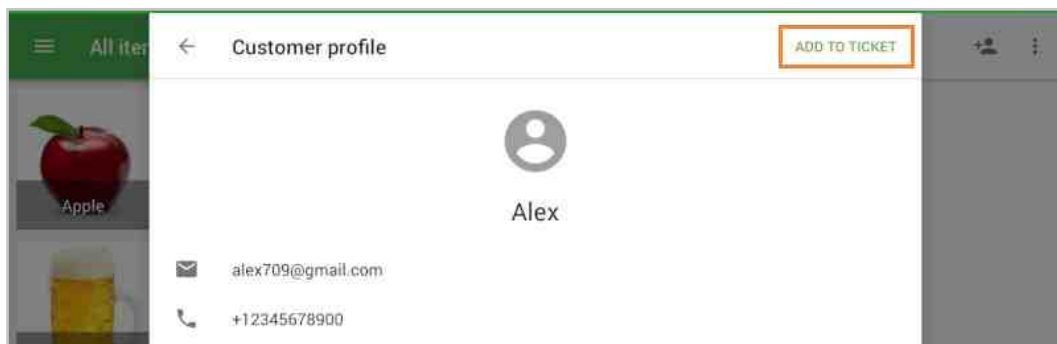
During a sale, tap the 'Add client' icon in the upper right corner of the screen.

3



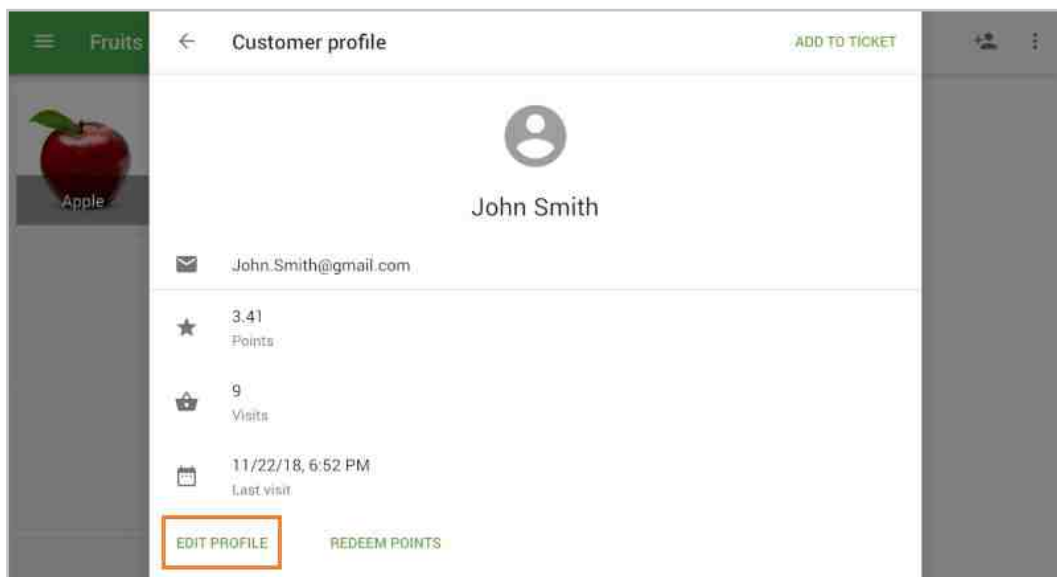
In the 'Search' field, start typing the customer's number that you wish to find. Select your customer from the list.

4



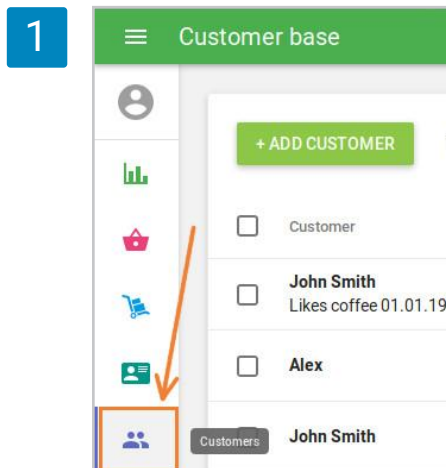
Tap 'Add to the ticket' button to connect the customer to the ticket.

5

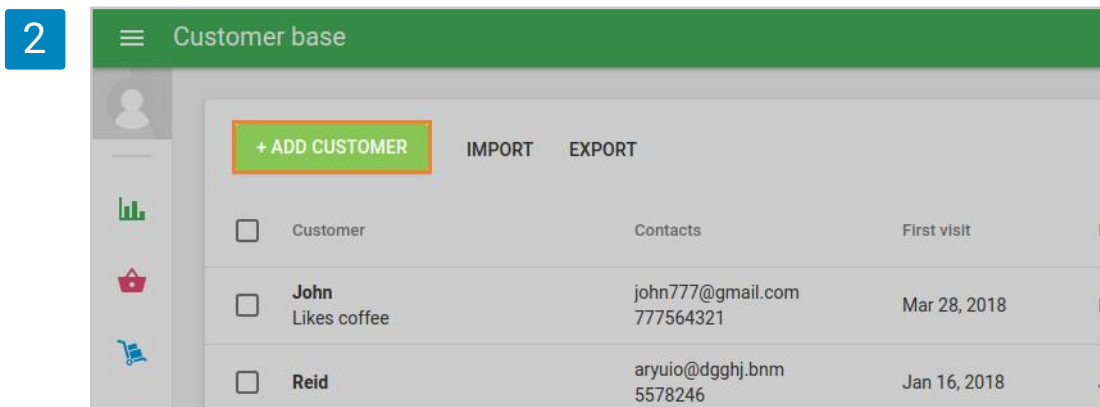


The number can be assigned not only to new customers but also to clients created earlier. To do this, find the card of the customer, tap 'Edit profile' and edit it by specifying the number.

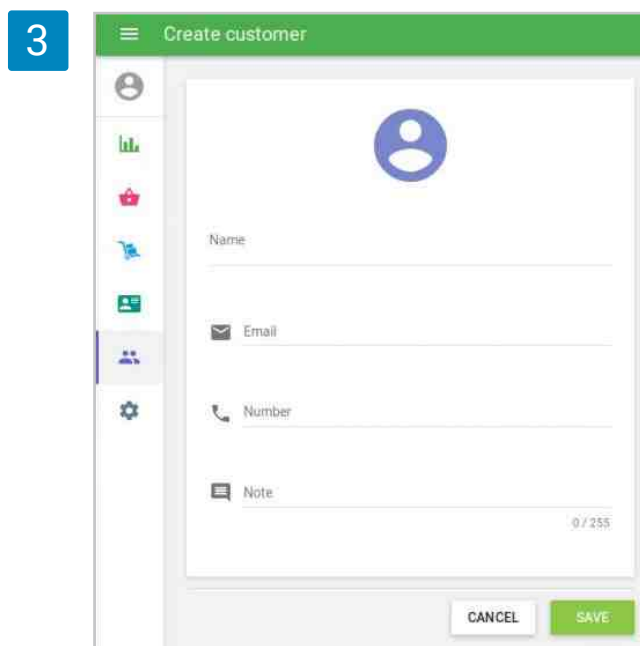
6.7 How to Work with Customer Base in the Back Office



After logging in to Back Office, go to the 'Employee list' in the 'Employees' section.



To create a new customer, click on the '+ Add customer' button.



The form 'Create customer' will open for editing.

4

Customer profile

< Customer base EDIT PROFILE MORE

Judy

152244545

Apr 03, 2018 First visit Apr 03, 2018 at 3:01 PM Last visit

0 Visits \$ 0.00 Total spent

0.00 Points

You cannot create a client without filling in one of the fields: Name, Number, or Email. You can also make some notes about the customer. After clicking on the 'Save' button, the Customer profile will be created.

5

Customer profile

< Customer base EDIT

Edit points balance

Delete customer

By clicking on 'Edit profile', you can change the Name, Number, and Note. There is 'Edit points balance' and 'Delete customer' buttons in the 'More' menu.

6

Edit points balance

Value

100

CANCEL SAVE

You can enter new points balance in the pop-up 'Edit points balance' form and click 'Adjust'.

7

Customer base

+ ADD CUSTOMER IMPORT EXPORT

Customer	Contacts	First visit	Last visit	Total visits	Total spent	Points balance
<input type="checkbox"/> John Likes coffee	john777@gmail.com 777564321	Mar 28, 2018	Mar 28, 2018 at 1:43 PM	3	65.47	0.00
<input type="checkbox"/> Reid	aryuio@dghj.bnm 5578246	Jan 16, 2018	Jan 16, 2018 at 2:27 PM	1	12.73	0.00
<input type="checkbox"/> Judy Likes coffee	152244545	—	—	0	0.00	100.00

Page: 1 of 1 Rows per page: 10

You can also open the existing Customer profile by clicking on the needed customer from the customer base.

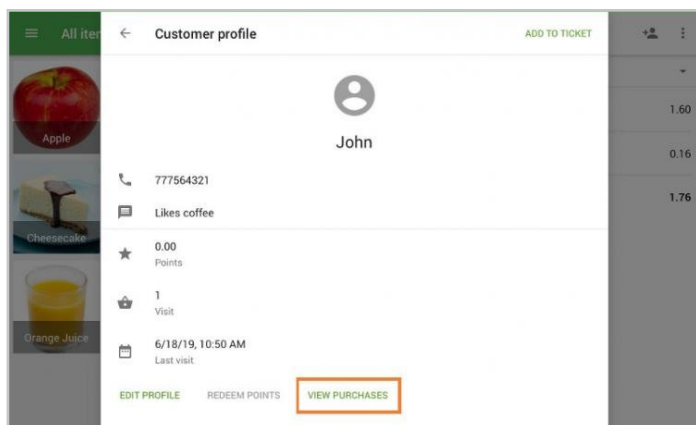
6.8 Purchase History of a Registered Customer in the POS

This feature makes it possible to see the purchase history of a registered customer during a sale at the POS.

Note

This feature is available on iOS devices only. It will be available on Android devices soon.

1



When making sales in the Loyverse POS app, add registered customer to the ticket. To see the purchase history of the customer, just tap the button “View purchases” on the customer profile.

2



You will see the list of past receipts issued from this store, connected to the customer. Select to see details.

3



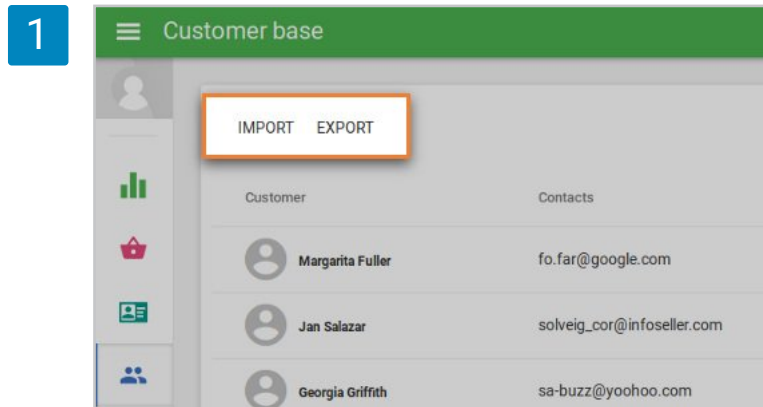
Once you open a selected receipt, you can make a refund, send the receipt by email (the button ‘send receipt’ is under the three dots menu) or reprint receipts (if a receipt printer is connected).

Note

If there is no internet connection, you will only be able to see receipts with this client that were downloaded (to the device’s memory storage) prior to viewing the archive of receipts.

6.9 Importing and Exporting Customers

At the Loyverse POS app (Android, iOS), you can manually add customers to the system and edit them. But if you would like to change or add many customers, importing and exporting functions at the back office will be quicker and more convenient.



Enter the back office and open your 'Customer base'.

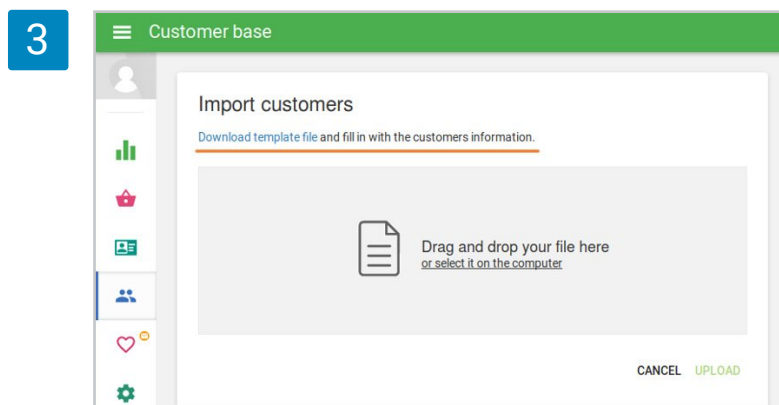
Click on the 'Export' button to download all of your contacts. Confirm the download dialog, and save the file to your computer.

2

	A	B	C	D	E	F	G	H	I	J
1	Customer ID	Customer name	Email	Number	Points balance	Note	First visit	Last visit	Total visits	Total spent
2	12770826	Margarita Fuller	fo.far@google.com		5.61		10/12/16 07:31 PM	12/09/16 05:55 PM	4	807000
3	34116094	Jan Salazar	solveig_cor@infoseller.com		4.91		10/12/16 01:49 PM	11/14/16 03:46 AM	2	737500
4	49557456	Georgia Griffith	sa-buzz@yoohoo.com		7.65		10/18/16 10:29 PM	11/06/16 05:53 AM	2	678300
5	70229659	Elaine McKenzie	corentin_kolb@mail.com		6.8		12/31/16 05:00 AM	12/31/16 05:00 AM	1	639600
6	53161385	Lucas Munoz	ma.corno@mail.com		0.12		12/25/16 11:41 PM	12/25/16 11:41 PM	1	616500
7	43373008	Lila Stanley	colicrowes@info.com		0.77		10/24/16 09:05 AM	10/24/16 09:05 AM	1	611000
8	81761946	Bert Hoffman	ad-dros@yahoo.ca		2.72		11/27/16 02:30 PM	12/05/16 05:22 PM	2	582800
9	66807134	Ervin Fisher	roc_breaule@msn.com		1.96		11/23/16 12:20 AM	11/23/16 12:20 AM	1	582100
10	74668770	Clifton Vega	lo_nas@msn.com		8.2		11/27/16 09:34 PM	12/04/16 09:32 PM	2	566900
11	29323099	Charles Wilkins	fi_rin@google.com		4.48		12/30/16 05:49 PM	12/30/16 05:49 PM	1	544000
12	10458784	Pat Swanson	elbe_be@bldn.com		8.87		10/15/16 12:21 AM	10/15/16 12:21 AM	1	540200

Now you can open your file, edit the customer list, and import it back to the system.

During the editing process, remember that the main identifier of your client is by their email address. There should not be different clients with the same email address.



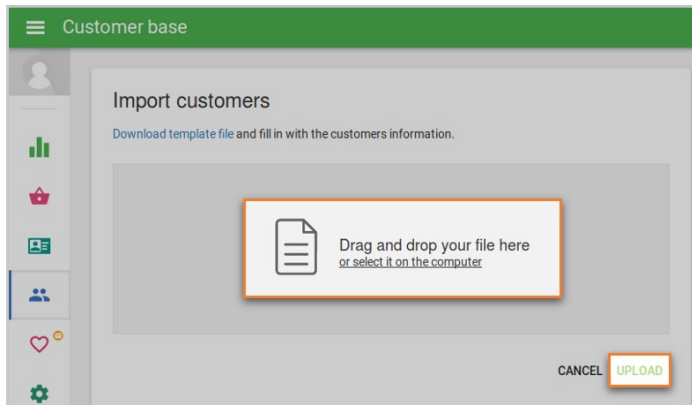
If you want to import the list of new customers, go to 'Import' and click the link, 'Download template file'.

4

	A	B	C	D	E	F
1	Customer ID	Customer name	Email	Number	Points balance	Note
2		Angels Hicks	courowa_we@toodles.com			
3		Estelles Chapman	elu_redofnd@infoseller.com			
4		Noahs Francis	Malla-fhi@bing.com			
5		Daniels Cunningham	dea_ifayd@google.com			
6		Devins Peterson	mauif_sim@yahoo.com			
7		Adrians Cox	ansfice_buse@yahoo.com			
8						

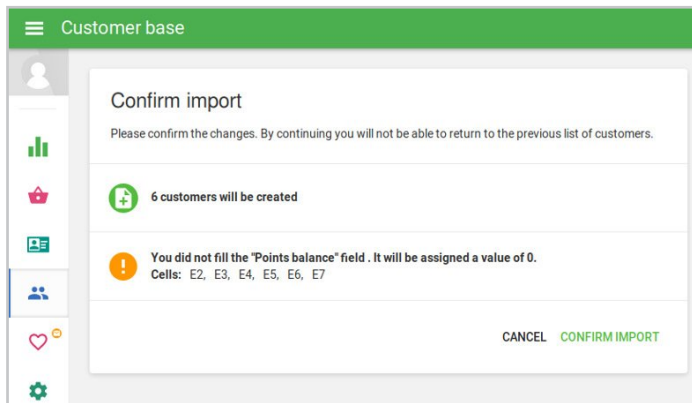
Open your template file and fill up new customer information to the specified columns. If you are missing some information, you may leave the cell blank. Do not delete the column names from the first row or change their place.

5



After the file of new customers has been made, you can save and import it at the 'Import customers' window by dragging and dropping it into the selected area or by selecting it in on your computer through the link. The import will start after clicking on the 'Upload' button.

6



Then, the confirmation window will appear with a short report and warning signs.

After confirming, the customer base will be renewed with the added customers or any changes to existing ones.

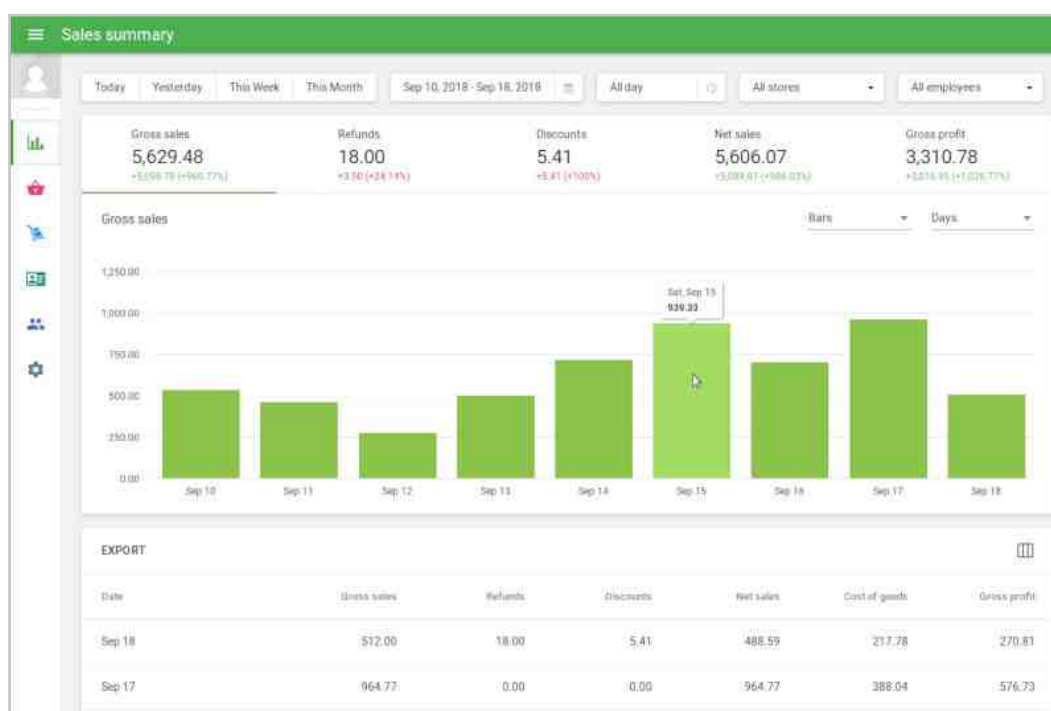
7. Reports



7.1 Sales Summary Report in the Back Office

When you enter the Back Office, you will see all of the most important information about your sales in the 'Sales Summary' section.

1



At the top, you can set the period for the report: today, yesterday, this week, this month or custom. If you have several stores, you can select some of them for the report. The same for employees.

There is a set of tabs with the values of main sales parameters: Gross sales, Refunds, Discounts, Net sales, Gross profit. Below each values, you can see how much more or less you made compared to the previous period in the same span of time.

If you click on any of these tabs, you will see the chart of the selected parameter for the period.

Gross sales is the total revenue, calculated as the sum of all sales prior to adding any discounts, tips, and taxes. However, if the tax is already included in the price of the goods, that price is used to calculate the gross sales.

Note

- Taxes that are added to the price will not be taken into account for Gross sales.
- Taxes that are included in the item price will be taken into account for Gross sales.
- Cost of the modifiers is counted in Gross sales. Discounts are not taken into account for Gross sales.

Refunds is the amount of money returned to the customers, calculated as the sum of the returned items' prices prior to adding any discounts, tips, and taxes. However, if the tax is already included in the price of the goods, that price is used to calculate refunds.

Discounts is the amount of all discounts applied to the items, calculated as the difference between the sum of discounts on sales receipts and the sum of discounts on the return receipts.

Net sales is the total revenue minus the cost of discounts and sales returns.

$$\text{Net Sales} = \text{Gross Sales} - \text{Discounts} - \text{Refunds}$$

Gross profit – Net sales minus Cost of goods of the item for the selected period

$$\text{Gross profit} = \text{Net sales} - \text{Cost of goods}$$

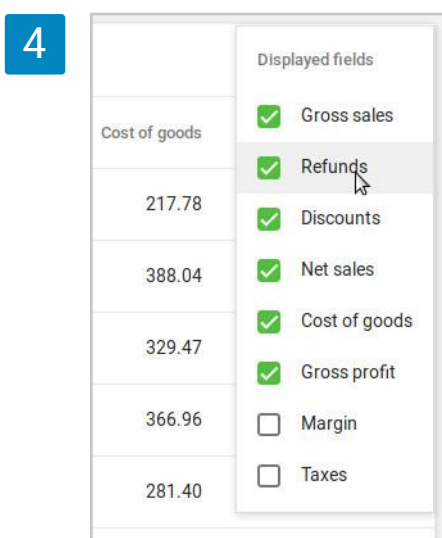


On the diagram of the sales parameters, you can choose to see the data either as an Area or Bars, and also group it hourly, daily, weekly, monthly, quarterly, or yearly.

3

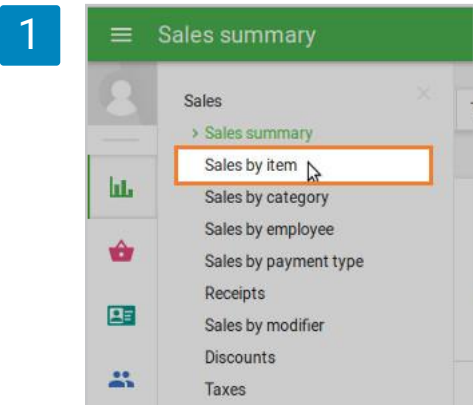
Date	Gross sales	Refunds	Discounts	Net sales	Cost of goods	Gross profit
Sep 18	512.00	18.00	5.41	488.59	217.78	270.81
Sep 17	964.77	0.00	0.00	964.77	388.04	576.73
Sep 16	704.32	0.00	0.00	704.32	329.47	374.85
Sep 15	939.33	0.00	0.00	939.33	366.96	572.37
Sep 14	718.77	0.00	0.00	718.77	281.40	437.37

At the bottom, you can see a table with the value of sales summary information for each day. You can export the Sales Summary report by clicking on the 'Export' button.

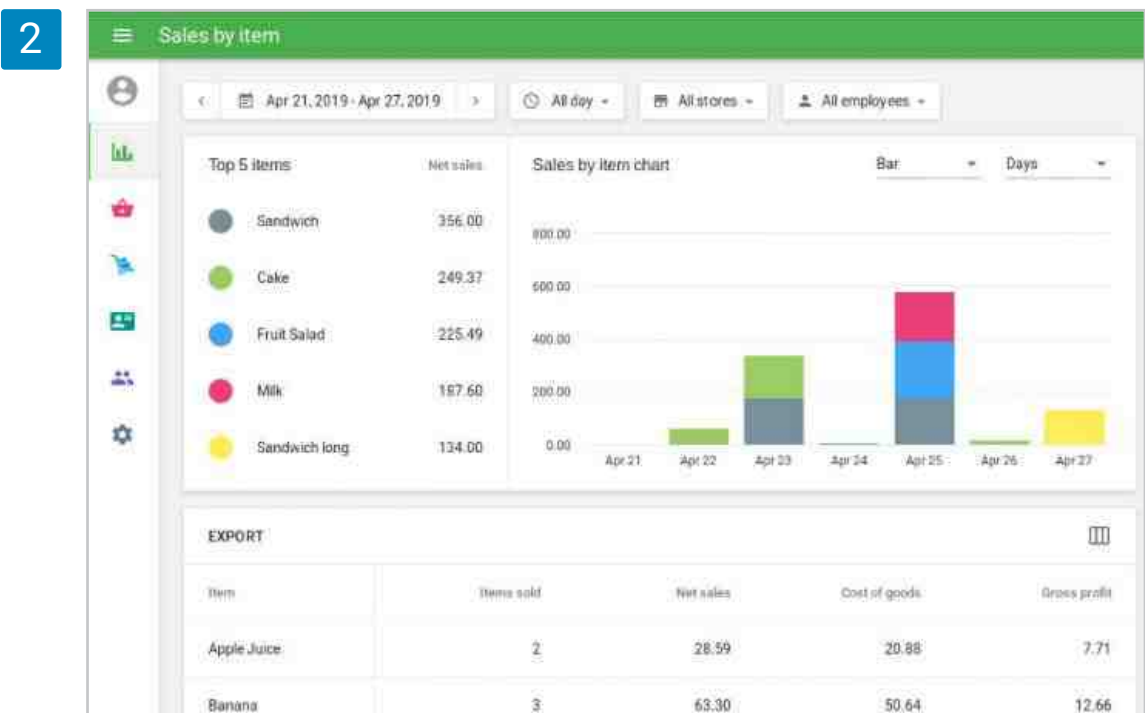


You can also set up and customize the displayed columns by clicking on the three vertical lines icon on the right-hand side of the header.

7.2 Sales by Item Report in the Back Office

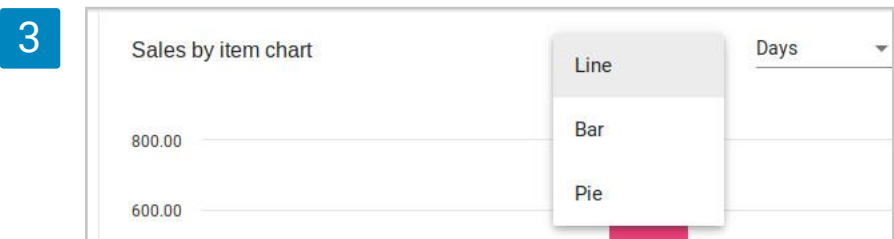


In the back office, go to the 'Sales by item' section.



At the top, you can set the period for the report: today, yesterday, this week, this month or custom.

You will see information about your sales by items. The top 5 items will be displayed according to the 'Net sales' along with the total amount sold next to it.



For the 'Sales by item chart' on the right side, you can choose to see the data either as a Bar, Line or Pie chart and also group it in Hours, Days, Weeks, Months, Quarters, or Years.

4

Item	Items sold	Net sales	Cost of goods	Gross profit
Apple Juice	2	28.59	20.88	7.71
Banana	3	63.30	50.64	12.66
Caesar Salad	2	28.00	10.60	17.40

At the bottom, you can see a table with the value of parameters for each item. You can also setup and customize the displayed columns by clicking on three vertical lines icon on the right-hand side of the header.

5

Displayed fields
<input checked="" type="checkbox"/> Item
<input type="checkbox"/> SKU
<input type="checkbox"/> Category
<input checked="" type="checkbox"/> Items sold
<input type="checkbox"/> Gross sales
<input type="checkbox"/> Items refunded
<input type="checkbox"/> Refunds
<input type="checkbox"/> Discounts
<input checked="" type="checkbox"/> Net sales
<input checked="" type="checkbox"/> Cost of goods
<input checked="" type="checkbox"/> Gross profit
<input type="checkbox"/> Margin
<input type="checkbox"/> Taxes

Parameter options include:

SKU – Stock Keeping Unit is a unique code given to each item. See details in How to Add Items in the Loyverse Back Office.

Category – the category of the item.

Items sold – the total number of the item that was sold during the selected period

Gross sales – the total revenue for the item for the selected period. See details in Sales Summary Report in the Back Office.

Items refunded – the total number of the item that was refunded during the selected period.

Refunds – the total amount refunded for the item during the selected period. See details in Sales Summary Report in the Back Office.

Discounts – the amount of all discounts on the item for the selected period. See details in Sales Summary Report in the Back Office.

Net sales – Gross sales minus the cost of discounts and sales returns for the selected period. See details in Sales Summary Report in the Back Office.

$$\text{NetSales} = \text{GrossSales} - \text{Discounts} - \text{Refunds}$$

Cost of goods – the item cost

Gross profit – Net sales minus Cost of goods of the item for the selected period.

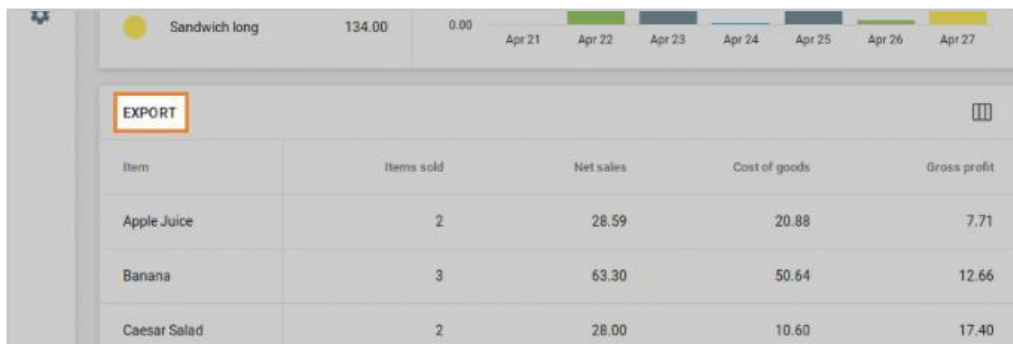
$$\text{GrossProfit} = \text{NetSales} - \text{CostOfGoods}$$

Margin – the item's margin for the selected period, calculated as the ratio of Gross profit to Net sales.

$$\text{Margin} = \frac{\text{GrossProfit}}{\text{NetSales}} 100\%$$

Taxes – the amount of taxes applied to the item for the selected period.

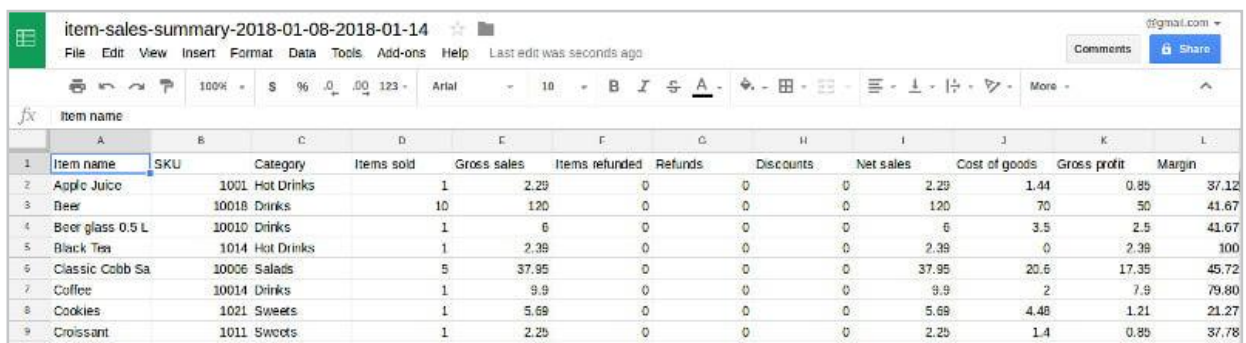
6



Item	Items sold	Net sales	Cost of goods	Gross profit
Apple Juice	2	28.59	20.88	7.71
Banana	3	63.30	50.64	12.66
Caesar Salad	2	28.00	10.60	17.40

You can export Sales by Item Report for the desired period in CSV file by clicking on the 'Export' button at the top of the data table.

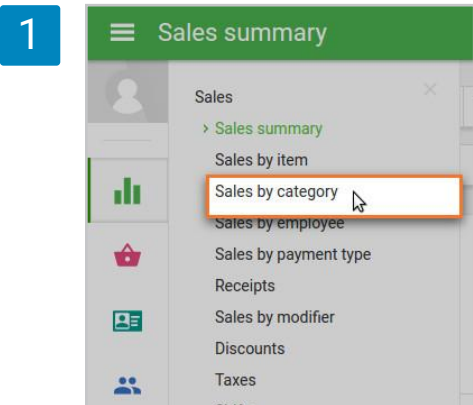
7



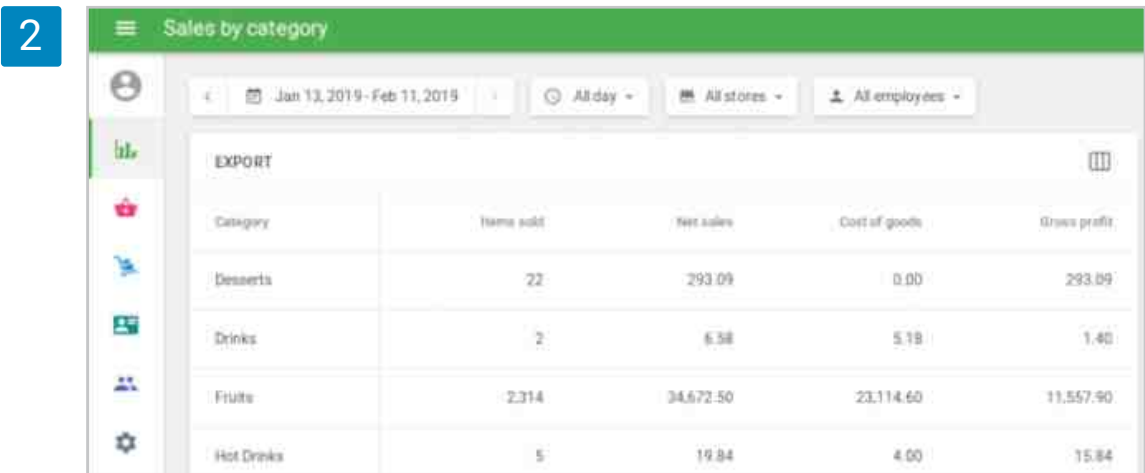
Item name	SKU	Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin
Apple Juice	1001	Hot Drinks	1	2.29	0	0	0	2.29	1.44	0.85	37.12
Beer	10018	Drinks	10	120	0	0	0	120	70	50	41.67
Beer glass 0.5 L	10010	Drinks	1	6	0	0	0	6	3.5	2.5	41.67
Black Tea	1014	Hot Drinks	1	2.39	0	0	0	2.39	0	2.39	100
Classic Cobb Sa	10006	Salads	5	37.95	0	0	0	37.95	20.6	17.35	45.72
Coffee	10014	Drinks	1	9.9	0	0	0	9.9	2	7.9	79.80
Cookies	1021	Sweets	1	5.69	0	0	0	5.69	4.48	1.21	21.27
Croissant	1011	Sweets	1	2.25	0	0	0	2.25	1.4	0.85	37.78

After you download the file to your computer, you can open it in Google Sheets.

7.3 Sales Report by Category



In the Back Office, go to the 'Sales by category' section.



You will then see five different columns:

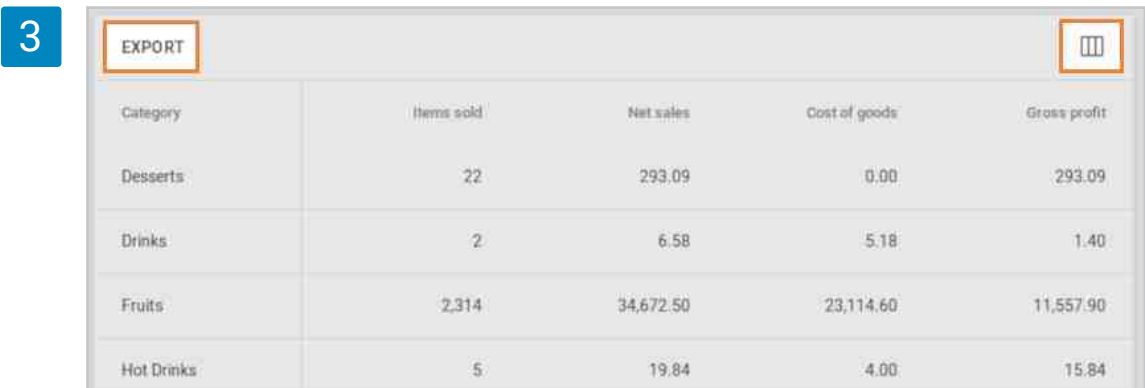
Category – List of categories.

Items sold – Number of items purchased per category.

Net sales – Category Revenue.

Cost of goods – Category costs.

Gross profit – Overall revenue minus costs.



You can export the 'Sales by category' report by clicking on the 'Export' button.

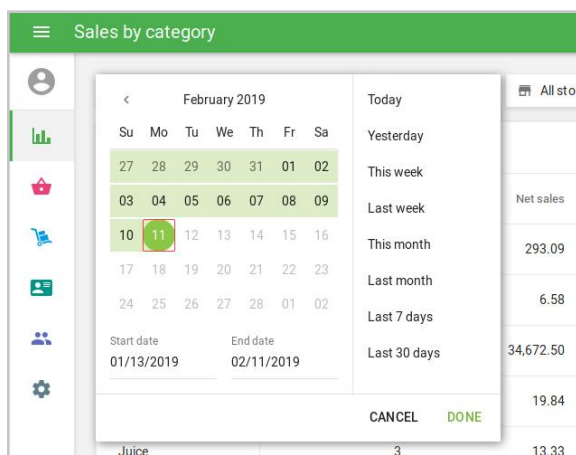
You can also set up and customize the displayed columns by clicking on the three vertical lines icon on the right-hand side of the header.

4

	Displayed fields
Cost of goods	<input checked="" type="checkbox"/> Category
0.00	<input checked="" type="checkbox"/> Items sold
5.18	<input type="checkbox"/> Gross sales
23,114.60	<input type="checkbox"/> Items refunded
4.00	<input type="checkbox"/> Refunds
9.36	<input type="checkbox"/> Discounts
54.00	<input checked="" type="checkbox"/> Net sales
36.00	<input checked="" type="checkbox"/> Cost of goods
	<input checked="" type="checkbox"/> Gross profit
	<input type="checkbox"/> Margin
	<input type="checkbox"/> Taxes

Then select your desired columns.

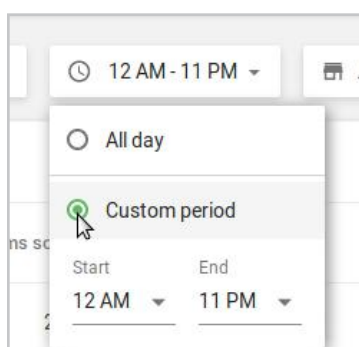
5



You can also choose the specific time period from which to view data: Today, Yesterday, This week, Last week, This month, Last month, Last 7 days, or Last 30 days.

Or you can select a start and end date on the calendar.

6



Select the period and click 'Done'.

If you want to generate a report for some particular time span during each day, choose 'Custom period' option instead of 'All day' and set the start and end time.

7

Category	Items sold		Cost of goods	Gross profit
Desserts	22	293.09	0.00	293.09
Drinks	2	6.58	5.18	1.40

If you have multiple stores, you can see all of your sale reports by selecting a filter for all or selected stores.

7.4 Receipts Section in the Reports in the Back Office

1

Sales summary	
	Sales summary
	Sales by item
	Sales by category
	Sales by employee
	Sales by payment type
	Receipts
	Sales by modifier

In the back office, go to the 'Receipts' section in the 'Reports' menu.

2

Type	Receipt no.	Date	Employee	Customer	Amount	Discount	Total
	8-1153	Jan 09, 2018 4:15 PM	Alex		16.62	-	16.62
	8-1152	Jan 09, 2018 4:14 PM	Alex	John Smith John.Smith@gmail.com	9.68	-	9.68
	8-1151	Jan 09, 2018 4:14 PM	Alex		40.58	-	40.58

You can choose the desired period for the report with the time selectors at the top of the page.

There is also an overview of different receipt types at the top of the page: 'all receipts,' 'sales,' 'refunds' and 'loyalty' program. If you click on any of these buttons, only this type of receipt will display on the list.

3

The screenshot displays the 'Receipts' section of a software interface. At the top, there are filters for 'Today', 'Yesterday', 'This Week', 'This Month', and specific dates. Below these are three large cards showing '21 all receipts', '20 sales', and '1 refunds'. A table lists recent receipts with columns: Type, Receipt no., Date, Employee, and Customer. On the right side, a detailed view of a receipt is shown, including the total amount of 9.68 and a list of items like Four Cheese Pizza and Fancy Coke.

If you move the cursor over each receipt, it will highlight the entire row. If you click on it, the receipt details will appear on the right side of the screen.

4

The screenshot shows the 'Receipts' section with filters for date range (Jun 19, 2019 - Jul 18, 2019), time of day (All day), and employee (All employees). Below the filters are three large cards showing '45 all receipts', '45 sales', and '0 refunds'. A table lists recent receipts with columns: Type, Receipt no., Date, Employee, Customer, Amount, Discount, and Total. An orange arrow points to the 'EXPORT' button in the top left corner of the table.

You can export specific receipt types for the desired period in CSV file by clicking on the 'Export' button.

5

	A	B	C	D	E	F	G	H	I	J	K	L
1	Date	Receipt number	Receipt type	Gross sales	Discounts	Net sales	Taxes	Tips	Total collected	Payment type	Description	POS
2	1/6/18 5:20 PM	11-1019	Sale	13.98	0	13.98	1.82	0	13.98	Card	1 x Black Tea, 1 POS 01	
3	1/6/18 5:19 PM	11-1018	Sale	14.42	0	14.42	1.88	0	14.42	Card	1 x Black Tea, 1 POS 01	
4	1/6/18 5:19 PM	11-1017	Sale	6.59	0	6.59	0.06	0	6.59	Cash	1 x Cake, 1 x Ca POS 01	
5	1/6/18 5:18 PM	11-1016	Sale	24	0	24	3.13	0	24	Card	2,000 x Beer POS 01	
6	1/6/18 5:18 PM	11-1015	Sale	5.25	0	5.25	0.08	0	5.25	Cash	1 x Croissant, 1 POS 01	
7	1/6/18 5:17 PM	11-1014	Sale	11.59	0	11.59	1.51	0	11.59	Card	1 x Coffee, 1 x C POS 01	

After you download the file to your computer, you can open it in Google Sheets.

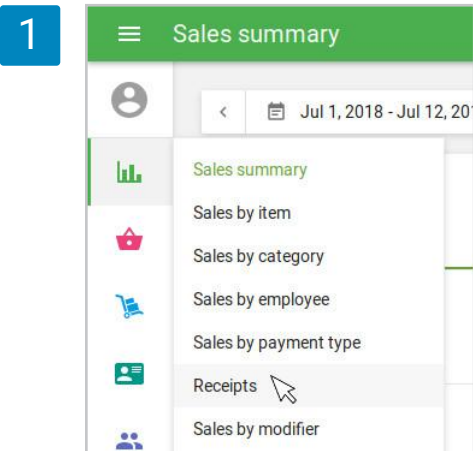
6

	J	K	L	M	N	O	P
cted	Payment type	Description	POS	Cashier name	Customer name	Customer contacts	
13.98	Card	1 x Black Tea, 1 POS 01		Alex	Jackie Figueroa	telfo_gall@bing.com	
11.48	Cash	1 x Supreme Piz POS 01		Alex	Jackie Figueroa	telfo_gall@bing.com	

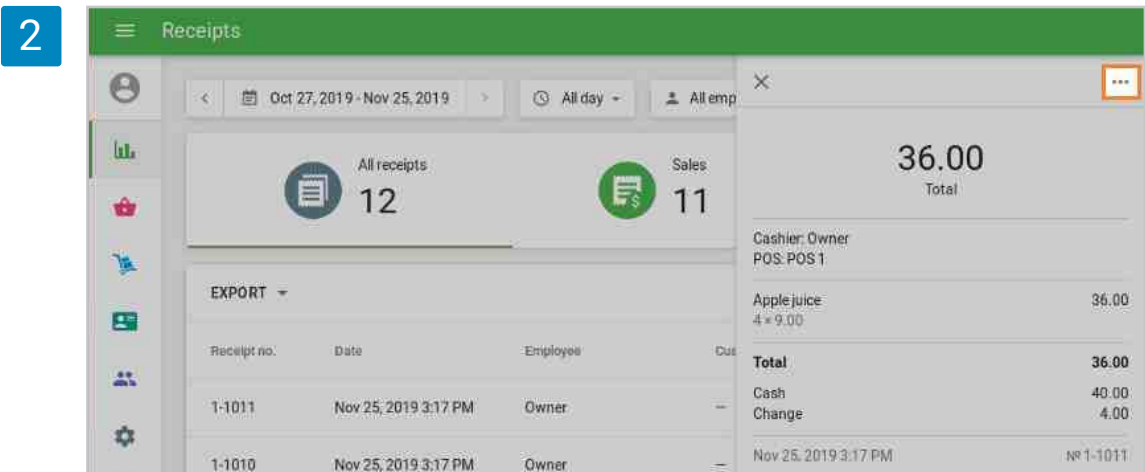
You can export specific receipt types for the desired period in CSV file by clicking on the 'Export' button.

7.5 How to Cancel Receipts

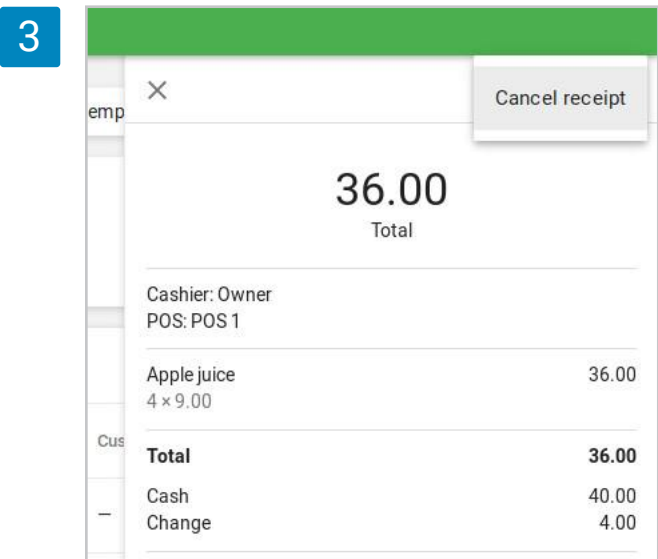
Cancellation of receipts is necessary when a sale/refund was made by mistake or for a test. When you cancel a receipt, it will not be accounted for in the reports, and all items will be returned to stock.



In the Back Office, go to the 'Receipts' section in the 'Reports' menu.

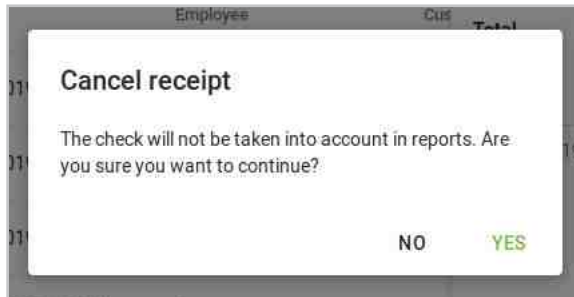


Click on the receipt that you want to cancel to see the receipt details. Click on the three dots menu in the upper right corner.



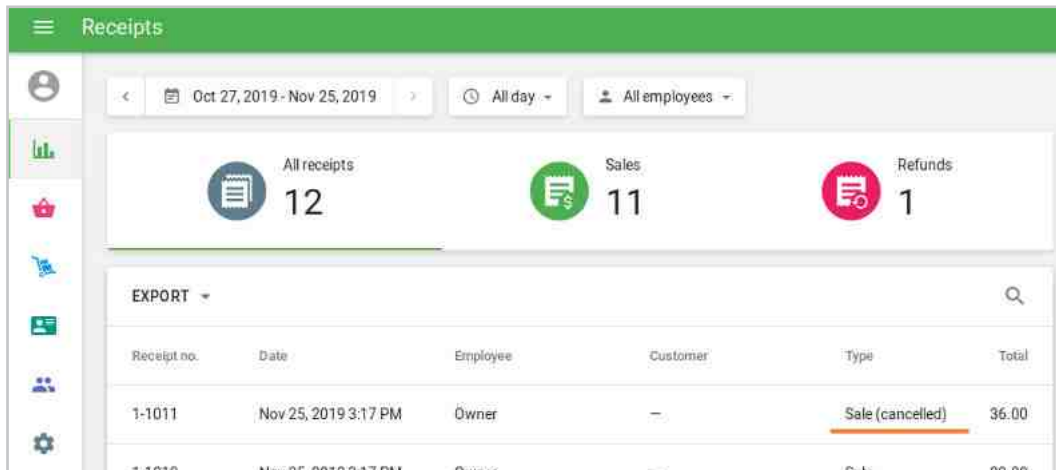
Click on the "Cancel receipt" button.

4



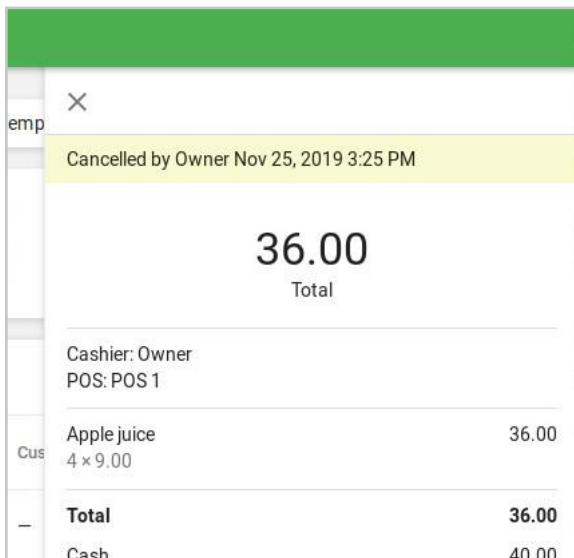
Confirm cancellation in the dialog screen.

5

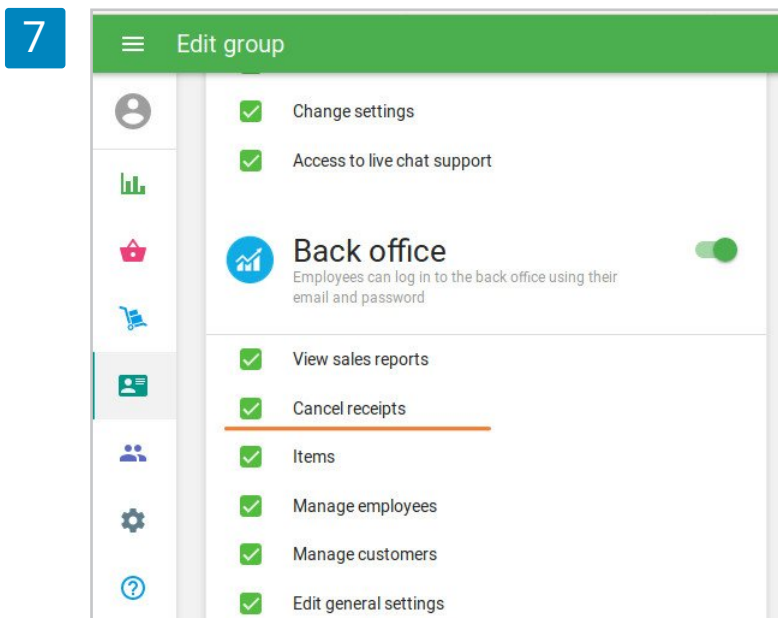


Now, this receipt is marked as cancelled in the receipts list.

6



And in the receipt details, you can see who cancelled it and when it was cancelled.



Cancellation of receipts can be performed by users with “Cancel receipts” rights. By default, this right is set for Owner and Administrator groups.

After the cancellation of the receipt:

- Amounts from cancelled receipts are not taken into account when calculating data in reports in the Back Office.
- Amounts from cancelled receipts are not taken into account in both the current and closed shifts.
- The quantity of sold items is returned to the stock, but when cancelling a refund receipt, the quantity of items is deducted from the stock.

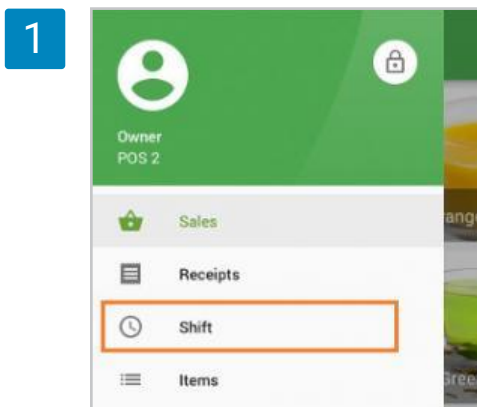
Note

- The cancellation of a receipt cannot be reversed.
- You cannot cancel the receipt that was fully or partially refunded without the cancellation of the refund receipt first.
- In case of cancellation of the receipts with integrated card payments, funds will not be returned to the customer’s card.

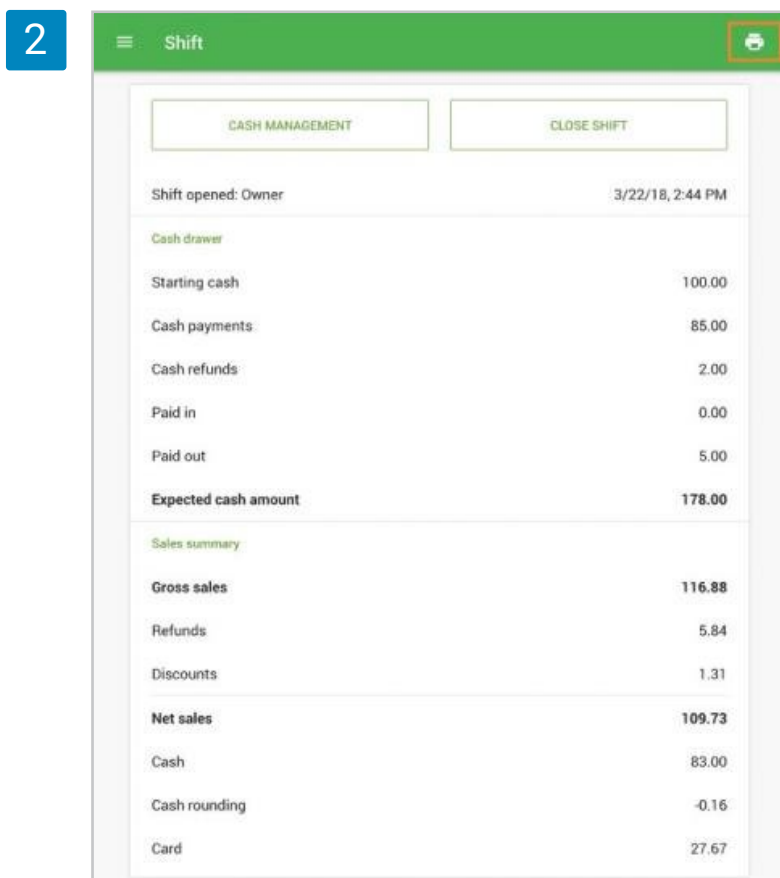
7.6 Shift Report with Sales Summary at the POS

It is possible to see the shift report when the option 'Use shifts' is switched on in the General Settings in the Back Office.

You can print a shift report if at least one receipt printer has been added in the POS app settings with the option to print receipts and bills.



You can access the current shift report by tapping the 'Shift' button in the main menu.



The report of the current shift contains data of the cash drawer and the current sales summary (X-report). You can print this report on your receipt printer by tapping the 'Print' icon.

The closed shift report contains data of the cash drawer and the sales summary at the closing of the shift, including the actual amount of cash and the difference in comparison with the expected amount (Z-report).

3

The screenshot shows the 'Shift' screen with a green header. Below the header, there are two buttons: 'CASH MANAGEMENT' and 'CLOSE SHIFT'. The 'CLOSE SHIFT' button is highlighted with a red rectangular box. Below the buttons, the text 'Shift opened: Owner' is followed by '3/22/18, 4:10 PM'. Under the heading 'Cash drawer', there is a list of items with their corresponding amounts: 'Starting cash' (100.00), 'Cash payments' (148.00), 'Cash refunds' (6.00), and 'Paid in' (0.00).

To get the closed shift report, tap the 'Close shift' button.

4

The screenshot shows the 'Close shift' dialog box. It has a title bar with a close button (X) and the text 'Close shift'. Inside the dialog, there are two input fields: 'Expected cash amount' with the value '237.00' and 'Actual cash amount' with the value '237.00'. Below these fields, there is a 'Difference' field with the value '-'. At the bottom, there is a 'Print report' toggle switch which is currently turned on. A 'CLOSE SHIFT' button is at the very bottom of the dialog.

If the user has rights, he/she can see the 'Expected amount of cash' that is calculated from sales, refunds, and cash paid in/out during the shift. Enter the 'Actual cash amount' that is in the cash drawer, and tap the 'Close shift' button.

5

Shift report	
Store: Shop 2	
POS: POS 2	
Shift opened:	
Owner	3/22/18, 4:10 PM
Shift closed:	
Owner	3/22/18, 4:15 PM
Cash drawer	
Starting cash	100.00
Cash payments	148.00
Cash refunds	6.00
Paid in	0.00
Paid out	5.00
Expected cash amount	237.00
Actual cash amount	237.00
Difference	-
Sales summary	
Gross sales	162.67
Refunds	13.38
Discounts	0.00
Net sales	149.29
Cash	142.00
Cash rounding	-0.82
Card	7.49
3/22/18, 4:15 PM	

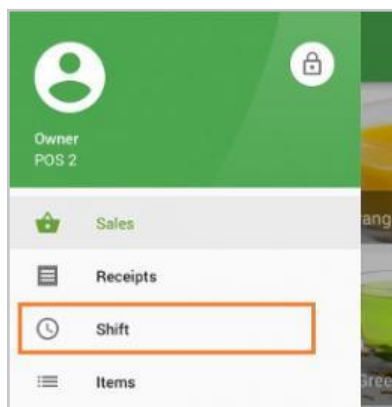
The closed shift report will be printed on your receipt printer.

7.7 How to Work with Shift History in the POS

Note

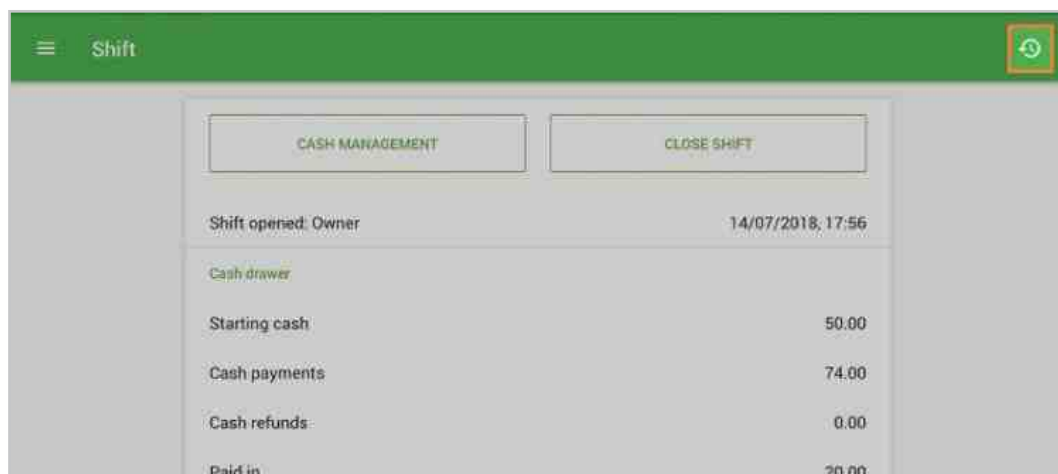
This feature is available on iOS devices only. It will be available on Android devices soon.

1



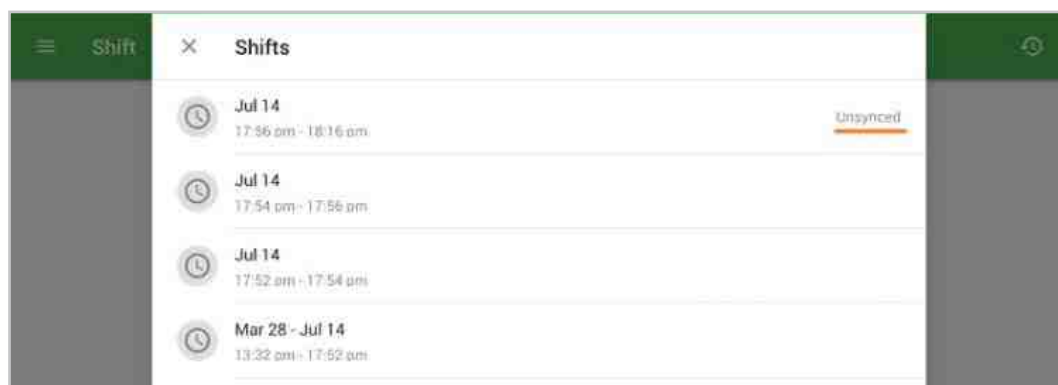
You can access the shift history by tapping the 'Shift' button in the main menu.

2

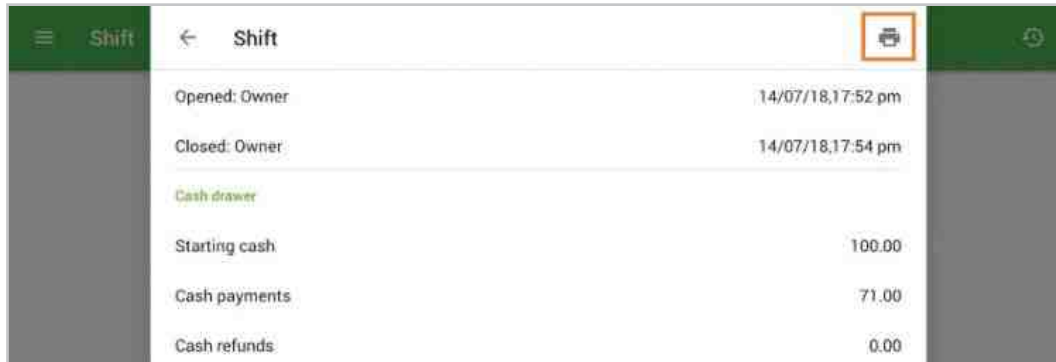


You will see the report of the current shift. Tap on the 'history' icon to access the shift history.

3



Shifts from the current POS will be displayed in the list. Non-synchronized shifts (unsynchronized events, such as openings, closing, pay-ins, payouts) will say 'Unsynced'.



Opened: Owner	14/07/18, 17:52 pm
Closed: Owner	14/07/18, 17:54 pm
Cash drawer	
Starting cash	100.00
Cash payments	71.00
Cash refunds	0.00

Tap on the shift in the list to see its details. You can print this report on your receipt printer by tapping the 'Print' icon.

Note

Viewing the shift history is available to all employees who have the "View shift report" access right.

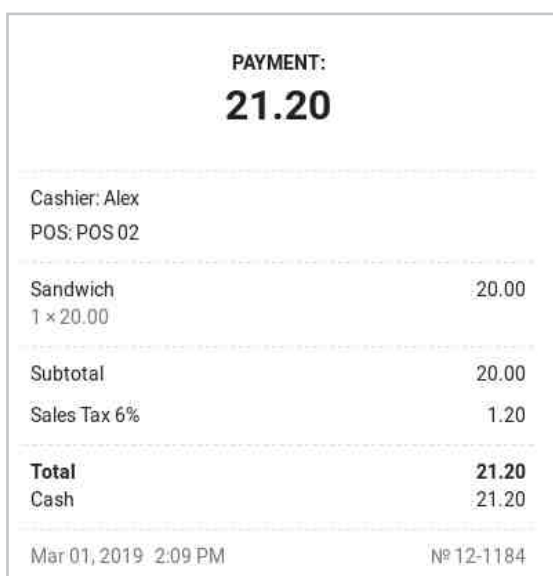
7.8 How Taxes are Calculated

There are two types of taxes that can be applied to items at Loyverse POS (Play Market or App Store): 'added to the price' and 'included in the price'.

An example of 'added to the price' tax is sales tax in the USA - where all the prices are listed without the sales tax, but during checkout, the sales tax is added to the price, and the customer pays the price of the item plus the sales tax.

An example of 'included in the price' tax is value-added tax (VAT) in EU countries, also known as goods and services tax (GST) in India, Australia, Canada, Malaysia, New Zealand, and Singapore - where the tax is already included in the price listed.

7.8.1 Calculation of 'Added to the Price' Tax



PAYMENT:	
21.20	
Cashier: Alex	
POS: POS 02	
Sandwich	20.00
1 x 20.00	
Subtotal	20.00
Sales Tax 6%	1.20
Total	21.20
Cash	21.20
Mar 01, 2019 2:09 PM	N° 12-1184

To calculate the value of the 'added to the price' tax, you have to multiply the item price by the tax rate in decimal form.

For example, if the tax rate is 6%, multiply the item's price by 0.06. So if the item is \$20, the value of the 'added to the price' tax will be $20 \times 0.06 = \$1.20$.

7.8.2 Calculation of 'Included in the Price' Tax

PAYMENT: 20.00	
Cashier: Alex POS: POS 02	
Burger 1 x 20.00	20.00
Total	20.00
VAT 6%	1.13
Cash	20.00
Mar 01, 2019 2:10 PM	Nº 12-1185

In the case of 'included in the price' tax, the item price consists of pre-tax price value plus the tax value

$$Price = PretaxPrice + Tax$$

And the tax will be applied to the pre-tax price.

To calculate the item's pre-tax price, divide the price by 1 + the tax rate in decimal form. To find the value of the tax that is included in the item's price, you have to subtract the pre-tax price from the item price.

For example, if the tax rate is 6%, divide the item's price by 1.06. So if the item is \$20 with the 'included in the price' tax, then the value of the pre-tax price is $20/1.06 = \$18.87$ (rounded), and the value of the 'included in the price' tax is $20 - 18.87 = \$1.13$.

7.8.3 Application of Several Taxes at the Same Time

PAYMENT: 15.00	
Cashier: Alex POS: POS 02	
Bread 1 x 12.00	12.00
Subtotal	12.00
Tax B 5%	0.60
Tax A 20%	2.40
Total	15.00
Cash	15.00
Mar 01, 2019 2:56 PM	Nº 12-1186

How to calculate the tax value if multiple 'added to the price' taxes were applied to an item

The value of multiple 'added to the price' taxes of an item is calculated in the same way as if only one tax is applied (see above).

For example, if you sell an item at \$12.00 with added tax A = 20% and added tax B = 5%, the tax values will be \$2.40 and \$0.60 respectively:
 $TA = 12 \times 0.20 = 2.4$; $TB = 12 \times 0.05 = 0.6$.

PAYMENT:	
12.00	
Cashier: Alex	
POS: POS 02	
Butter	
1 × 12.00	12.00
Total	
	12.00
Tax B 5%	0.48
Tax A 20%	1.92
Cash	12.00
Mar 01, 2019 3:06 PM	
№ 12-1187	

How to calculate the tax value if multiple 'included in the price' taxes were applied to an item

The value of 'included in the price' tax of an item is calculated as the multiplication of the price of the item and the tax rate, divided by the sum of the rates of all included taxes plus one:

$$TI = \frac{p \times TIPV}{(1 + \sum_i TIPV_i)}$$

where

TI = the value of the 'included in the price' tax

p = the price of the item

TIPV = the included tax rate in decimal form

i = the number of tax rates included in the price

For example, if you sell an item at \$12.00 with included tax A = 20% and included tax B = 5%, the value of TI will be \$1.92 and \$0.48 respectively:

$$TI_A = \frac{12 \times 0.2}{(1 + 0.2 + 0.05)} = 1.92$$

$$TI_B = \frac{12 \times 0.05}{(1 + 0.2 + 0.05)} = 0.48$$

PAYMENT:	
12.96	
Cashier: Alex	
POS: POS 02	
Sausage	
1 × 12.00	12.00
Subtotal	
	12.00
Tax B (included) 5%	0.48
Tax A (included) 20%	1.92
Tax C 10%	0.96
Total	
	12.96
Cash	12.96
Mar 01, 2019 3:14 PM	
№ 12-1188	

How to calculate the value of the 'added to the price' tax if the price has included taxes

The value of the 'added to the price' tax of an item is calculated as the multiplication of the rate of the added tax by the price of the goods reduced by the sum amount of the included taxes:

$$TA = TAPV \times (p - \sum_i TI_i)$$

where

TA = the value of the 'added to the price' tax

p = the price of the item

TAPV = the added tax rate in decimal form (1% = 0.01)

TI = the value of the 'included in the price' tax

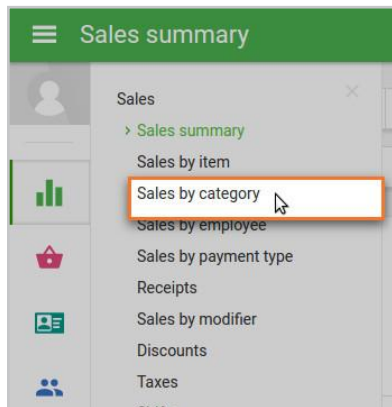
i = the number of tax rates included in the price

For example, if you sell an item at \$12.00 with included tax A=20% and included tax B=5%, and also added tax C=10%, the value of TA will be \$0.96:

$$TA = 0.1 \times (12 - (1.92 + 0.48)) = 0.96$$

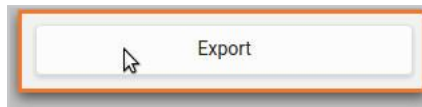
7.9 How to Export Data from Reports and Open in Excel

1



Select your Report in Back Office, in the “Reports” section. For example, view “Sales by category.”

2



After selection of the required period, press the “Export” button.

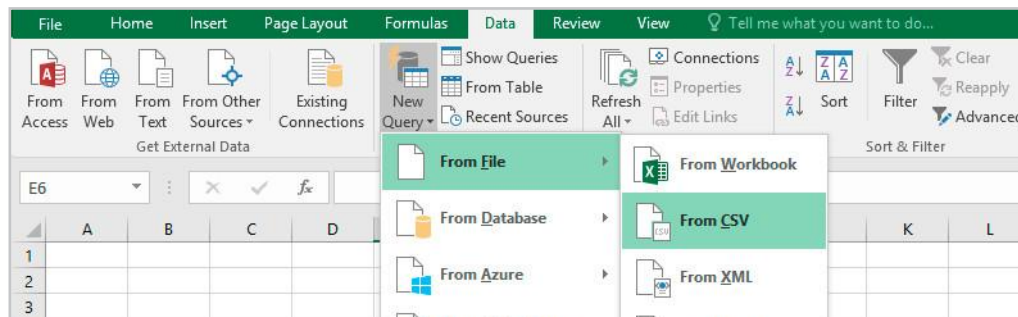
And enter your filename. Loyverse POS can export data in the CSV spreadsheet. Now you have the file saved on your computer.

3



Next, you have to open your file through Microsoft Excel.

4



At the bottom, you can see a table with the value of parameters for each item. You can also setup and customize the displayed columns by clicking on three vertical lines icon on the right-hand side of the header.

5



Select your CSV file and click ‘Import’.

6

category-sales-summary-2017-01-01-2017-02-18 - Query Editor

Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11
1 Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin	Taxes
2 Juice	156.000	2537.99	0.000	0.00	0.00	2537.99	2054.96	483.03	19.03%	38.01
3 Soft drinks	23.000	1035.08	0.000	0.00	0.00	1035.08	825.38	209.70	20.26%	0.35
4 Hot Drinks	169.000	4325.68	0.000	0.00	0.00	4325.68	2909.58	1416.10	32.74%	48.45
5 Fruits	131.000	4004.33	0.000	0.00	0.00	4004.33	3193.40	810.93	20.25%	66.34
6 Sandwiches	74.000	1665.07	0.000	0.00	0.00	1665.07	1323.80	341.27	20.50%	17.35

You will see a 'Query Editor' window with table.

7

category-sales-summary-2017-01-01-2017-02-18 - Query Editor

Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11
1 Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin	Taxes
2 Juice	156.000	2537.99	0.000	0.00	0.00	2537.99	2054.96	483.03	19.03%	38.01
3 Soft drinks	23.000	1035.08	0.000	0.00	0.00	1035.08	825.38	209.70	20.26%	0.35
4 Hot Drinks	169.000	4325.68	0.000	0.00	0.00	4325.68	2909.58	1416.10	32.74%	48.45
5 Fruits	131.000	4004.33	0.000	0.00	0.00	4004.33	3193.40	810.93	20.25%	66.34
6 Sandwiches	74.000	1665.07	0.000	0.00	0.00	1665.07	1323.80	341.27	20.50%	17.35

Click 'Close & Load'.

8

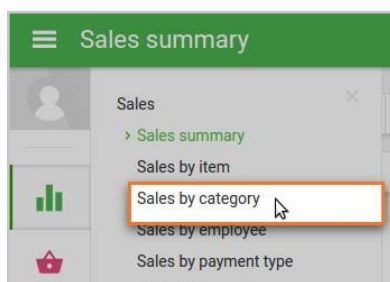
File Home Insert Page Layout Formulas Data Review View Tell me what you want to do...

Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11
2 Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin	Taxes
3 Juice	156.000	2537.99	0.000	0.00	0.00	2537.99	2054.96	483.03	19.03%	38.01
4 Soft drinks	23.000	1035.08	0.000	0.00	0.00	1035.08	825.38	209.70	20.26%	0.35
5 Hot Drinks	169.000	4325.68	0.000	0.00	0.00	4325.68	2909.58	1416.10	32.74%	48.45
6 Fruits	131.000	4004.33	0.000	0.00	0.00	4004.33	3193.40	810.93	20.25%	66.34
7 Sandwiches	74.000	1665.07	0.000	0.00	0.00	1665.07	1323.80	341.27	20.50%	17.35

As a result, you have opened the table with the exported sales report by category.

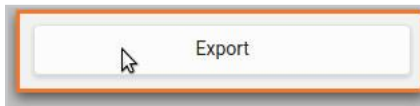
7.10 How to Export Data from Reports and Open in LibreOffice Calc

1



Select your Report in Back Office, in the "Reports" section. For example, view "Sales by category."

2



After selection of the required period, press the “Export” button.

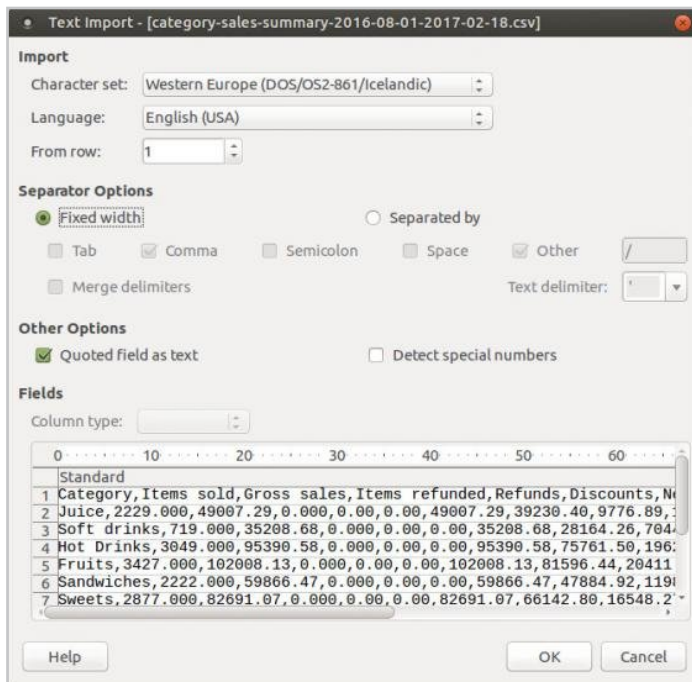
And enter your filename. Loyverse POS can export data in the CSV spreadsheet. Now you have the file saved on your computer.

3



Next, you have to open your file through LibreOffice Calc (or OpenOffice Calc).

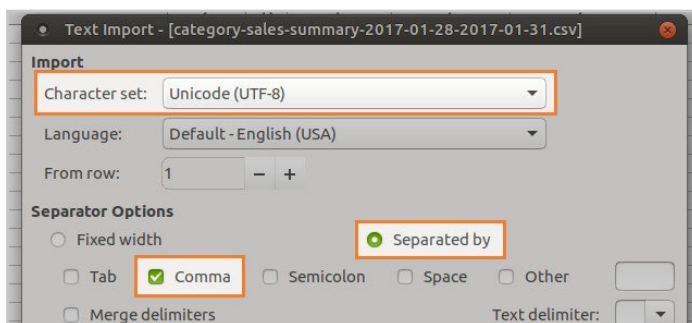
4



In LibreOffice Calc, select ‘File - Open...’ (CTRL + O) and select your CSV file.

You will see a ‘Text Import’ window. You have to set up correct options to open the file.

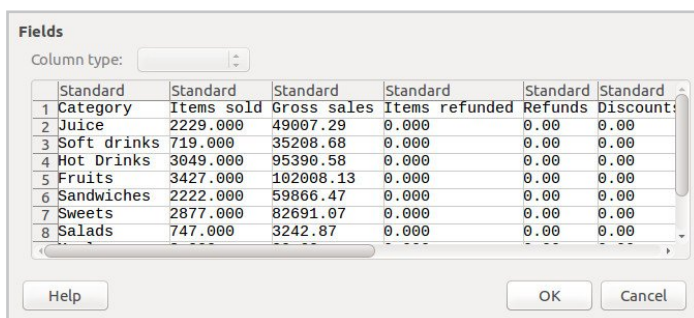
5



Select ‘Unicode (UTF-8)’ encoding in ‘Character set’ drop-down list.

In Separator Options, select ‘Separated by’ and select checkbox ‘Comma’.

6



As soon as you set up correct options, you will see table with your data in the preview window. Click 'OK' button to open file.

7

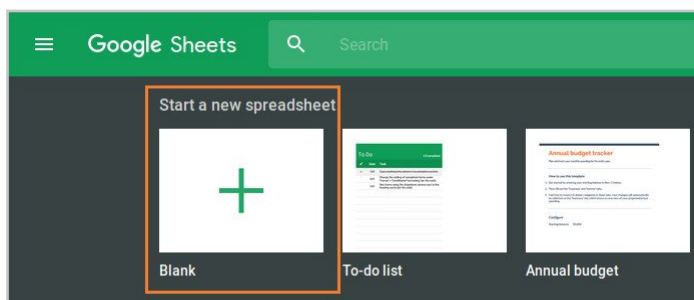
	A	B	C	D	E	F	G	H	I	J	K
1	Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin	Taxes
2	Juice	2229	49007.29	0	0	0	49007.29	39230.4	9776.89	19.95%	38.01
3	Soft drinks	719	35208.68	0	0	0	35208.68	28164.26	7044.42	20.01%	0.35
4	Hot Drinks	3049	95390.58	0	0	0	95390.58	75761.5	19629.08	20.58%	48.45

As a result, you have opened the table with the exported sales report by category.

7.11 How to Open CSV File in Google Sheets

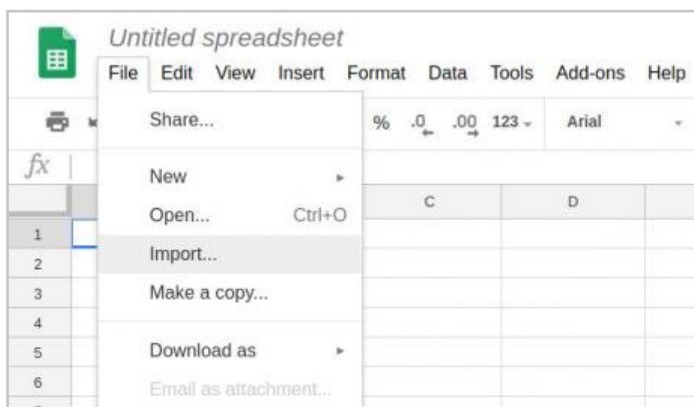
CSV files are used in the Back Office for exporting reports, importing-exporting items, and clients. For opening this type of files, you can use Google Sheets.

1



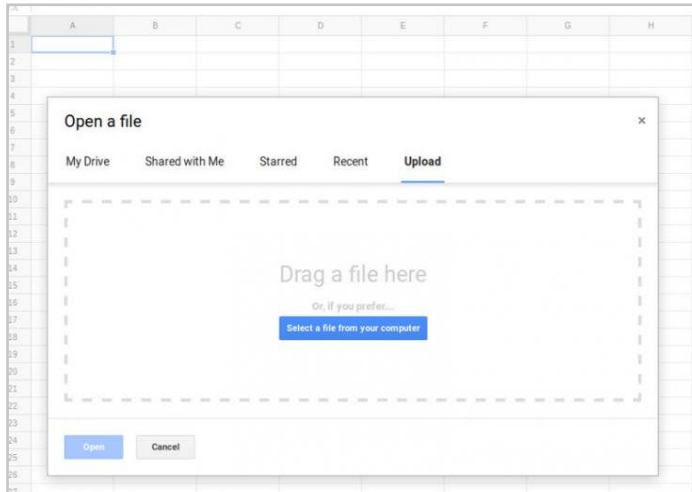
Go to Google Sheets and click on the button 'Start a new spreadsheet'.

2



Go to 'File' menu and click on 'Import' button.

3



Go to the 'Upload' tab of the 'Open a file' window and select your file from your computer.

4

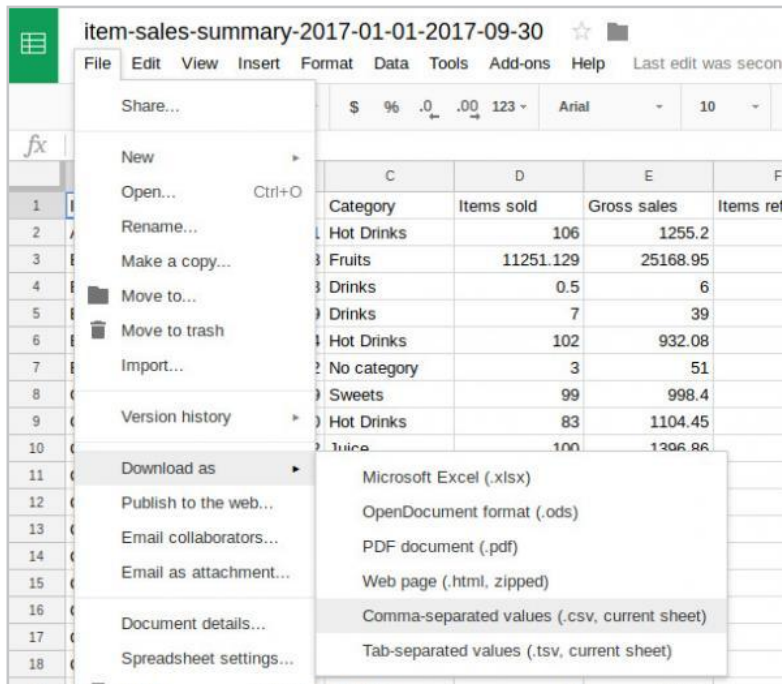


In the Import file settings window, select 'No' for 'Convert text numbers and dates', and then click on the 'Import data' button.

5

export_items(5)								
File Edit View Insert Format Data Tools Add-ons Help Last edit was seconds ago								
100% \$ % .0 .00 123 Arial 10 B I S A								
fx	SKU							
	A	B	C	D	E	F	G	
1	SKU	Name	Category	Cost	Sold by weight	Barcode	SKU of Included	Quanti
2	1001	Apple Juice	Hot Drinks	1.44	N	10544566251001		
3	1018	Banana	Fruits	0.88	Y	10544566251018		
4	10018	Bier	Drinks	7	Y			
5	10019	Bier 0.5	Drinks		N		10018	
6	1014	Black Tea	Hot Drinks	1.24	N	10544566251014		
7	1019	Cake	Sweets	1.59	N	10544566251019		
8	10000	Capuccino	Hot Drinks	1	N	7622210286772		
9	1002	Carrot Fresh Juice		0	N	10544566251002		
10	10000	Carbohydrate	Fruits	0	N			

As a result, you have opened CSV file as a table. Now you can edit this spreadsheet.



If you want to save the spreadsheet in the CSV format to your computer for further importing in the Loyverse Back Office, go to 'File' menu, select 'Download as' and click on 'Comma-separated values' button.

7.12 Using Loyverse Dashboard

Loyverse Dashboard App (Android, iOS) gives you instant access to your store's most valuable data. Complementing the Loyverse POS app, it puts key real-time information about your business at your fingertips allowing you to make important decisions immediately.

To start using Loyverse Dashboard, sign in with the same email and password you use to access Loyverse POS back office.



What you see right away is today's sales summary chart: the number of receipts, net sales figure and the average ticket size. The chart also shows a comparison to the previous day's data – this way you can quickly evaluate the two periods.

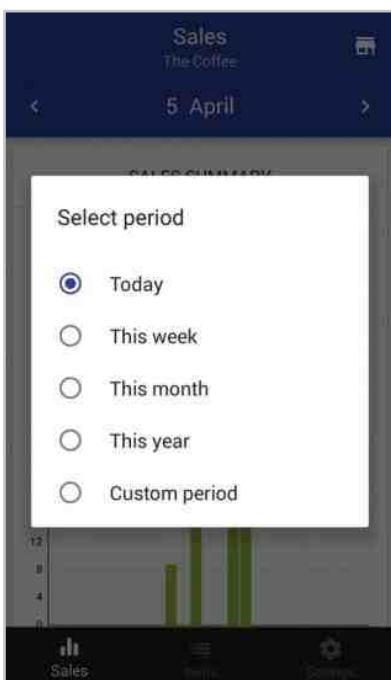
Sales summary The Coffee	
5 April	
Gross sales	67.29
Refunds	0.00
Discounts	0.00
Net sales	67.29
Tips	0.00
Total tendered	67.29
Cost of goods	27.25
Gross profit	40.04

For more details just tap the chart to view sales breakdown.

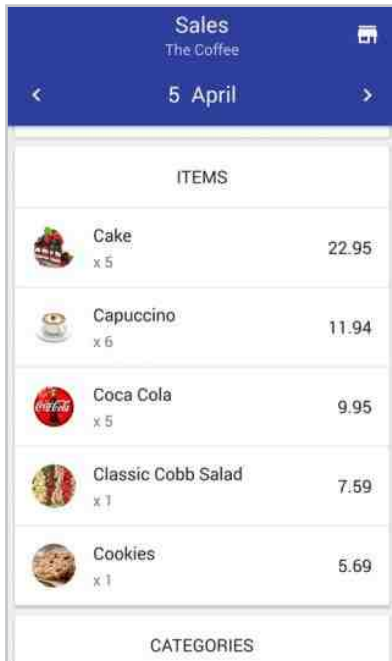
To return to the chart view, tap the Back arrow or Sales icon in the bottom menu.



You can navigate back and forth in time by tapping the arrows left and right of the date.



When you'd like to analyze a longer period, tap the date and select this week, month, or even an entire year.



If you want to set a custom time period, use the calendar and tap the beginning and the ending dates.

Depending on the selected time period, the sales bar chart will show data broken down by an hour, day, or month. Pinch the bar chart to change its scale or tap it to see the exact values for selected bars.

Scroll down to view your sales by items, categories, and employees.

Again, if you want more details, tap the appropriate screen to drill down and tap the back arrow to return to the main screen. In each detailed view, it may be convenient to sort the list by tapping the sort arrow.

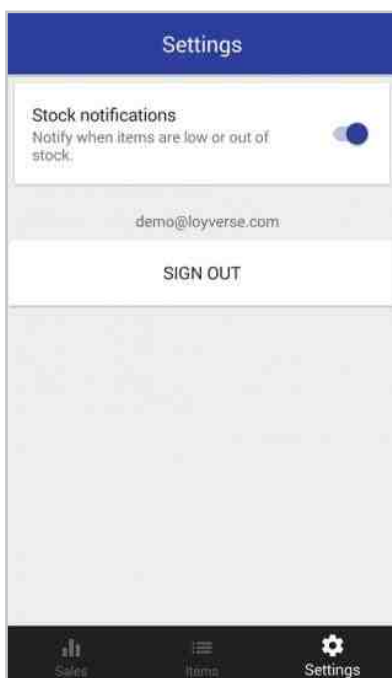
7.12.1 Stock Alerts



To keep on selling, you have to make sure your store carries sufficient stock. To check the stock status, switch to the Items tab.

Here you see items that are currently in stock, low on stock, or out of stock. To refine the picture, you can use the filter to see only low-stock or out-of-stock items.

Whenever a sale is made, and the stock gets depleted, you will receive a push notification.



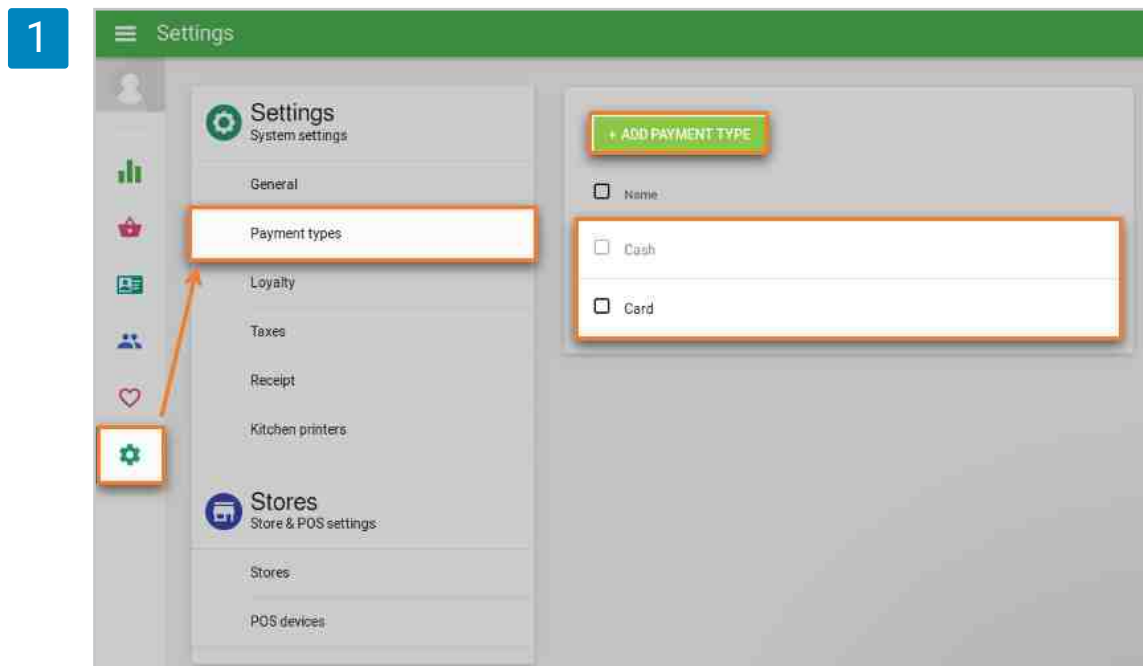
If you don't like to receive instant stock alerts, turn this feature off in the Settings tab.

8. Settings

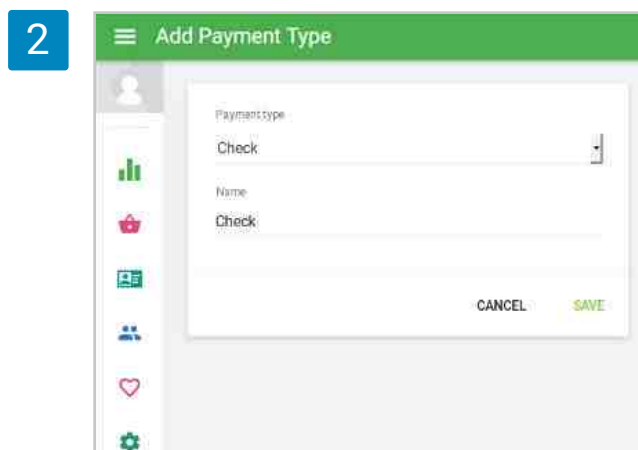


8.1 Configuring Payment Types in Loyverse POS

When you launch Loyverse POS for the first time, it already has default presets for two of the most common types of payment: cash and card. If you accept other methods of payment and want to see a detailed sales report for each payment type, you can easily customize or add other payment types.



Log in to the Back Office, click the Settings menu and then Payment types. Click the Add payment type button to add a new type of payment.



In the Add Payment Type window, select a payment type from the drop-down list. For each payment type you can specify a unique name, which will appear in the report. Cash is the default payment type and cannot be changed. Save your changes when done.

3

At the final stage of the sale transaction in the Loyverse POS app (Play Market or App Store), you can choose the type of payment.

4

The information about the payment type will be shown on the receipt.

5

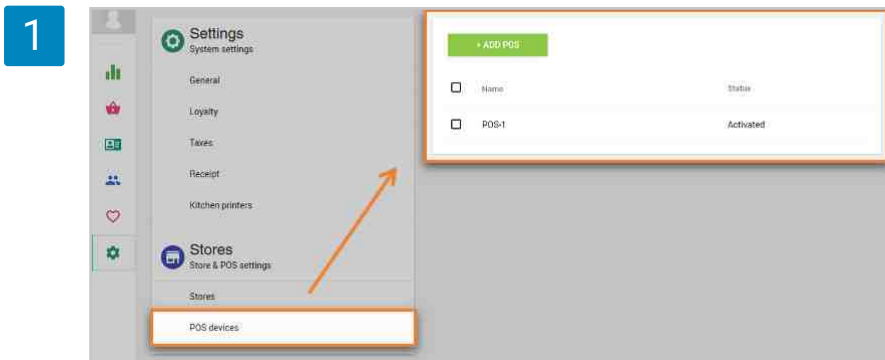
Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	3	57.64	0	0.00	57.64
Cash	2	29.61	0	0.00	29.61
Check	1	12.47	0	0.00	12.47
E-money	1	4.65	0	0.00	4.65
Total	7	104.37	0	0.00	104.37

Finally, the Sales by Payment Type report in the Back Office will show your sales numbers sorted by payment type.

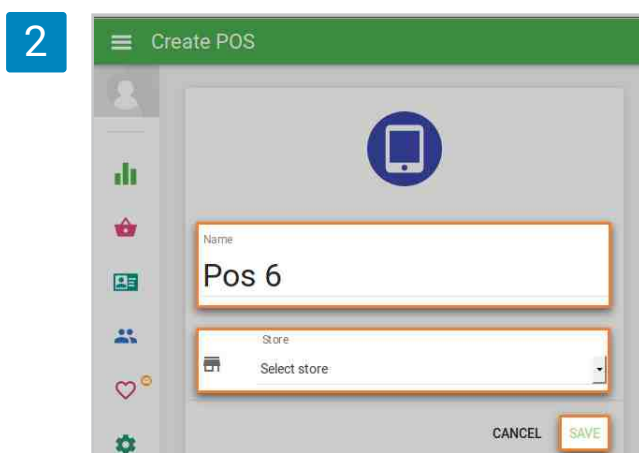
If you delete or rename a payment type, the historical data will not change: you will still see the payment type name as it appeared at the time of purchase in all the receipts that were synchronized before the change.

8.2 How to Create, Activate and Delete POS

8.2.1 How to Create New POS

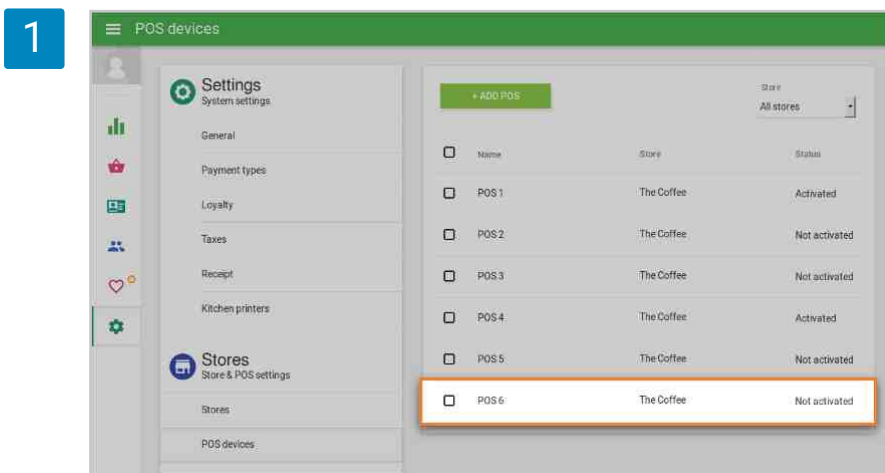


At the back office you can add a new POS in the 'POS devices' section.



In the 'Create POS' form insert the Field Name and select the Store where it will work. Don't forget to click on the 'Save' button.

8.2.2 How to Activate POS



After you create a new POS at the back office, it will appear at the list of your POS devices, with the status 'Not Activated'.

2



To activate it you have to login to your new POS on your mobile device with the E-mail and password of the store owner. After that the owner can switch the user account to a different employee.

3



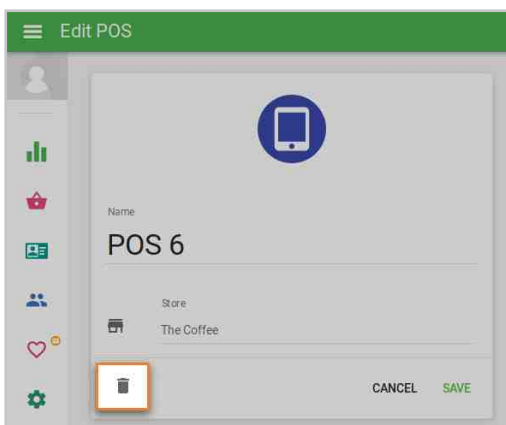
Afterwards, in your back office, the new POS will change its status to Activated.

8.2.3 How to Delete POS

Important!

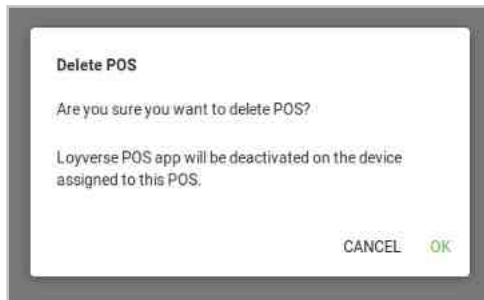
- Before deleting your POS from the back office: close all open tickets and close shift in your POS on the Mobile device.
- Also make sure that all sale records made on the Mobile device have been synchronized with the back office. To do this, at the back office, open your 'Receipts' list and check your receipts. Click on the receipt and after it opens at the right check the POS name. If you have any missing receipts, connect your mobile device to the Internet and all data from your POS will be synchronized with the back office.

1



To delete POS find it in the 'POS devices' list, enter it for editing and click the trash icon.

2



In the pop up window, confirm your intentions by clicking on 'OK' button.

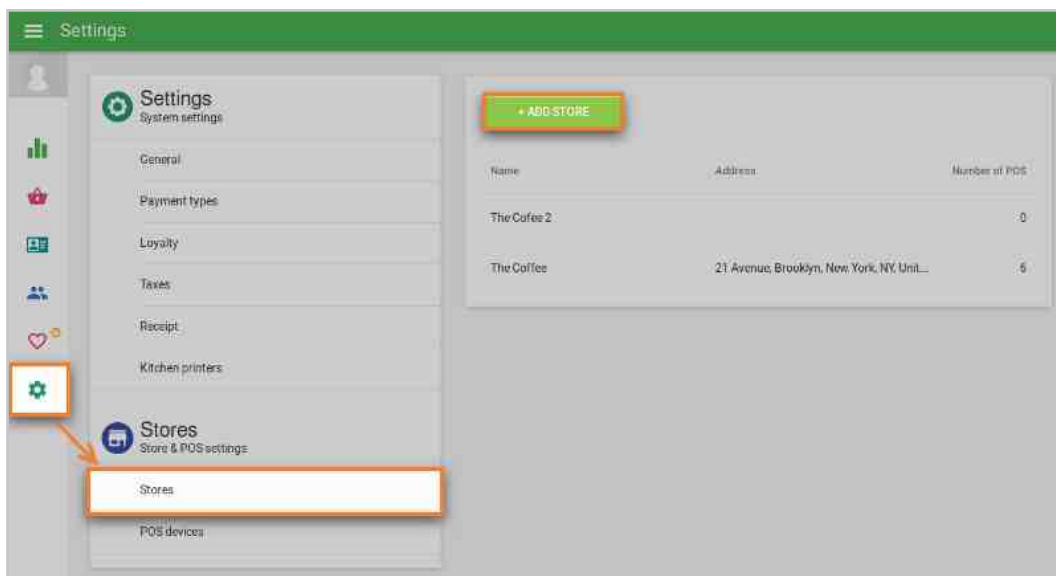
After you delete your POS at the back office, you will still have all of the receipts created on this POS, if they were synchronized before the deletion. However this POS will be deactivated on the device.

8.3 How to Create and Manage Multiple Stores under One Account

With Loyverse POS (Android, iOS) you can manage multiple stores under one account. Track your sales, inventory, employees and customers — everything you need to know in one place.

8.3.1 Adding a New Store

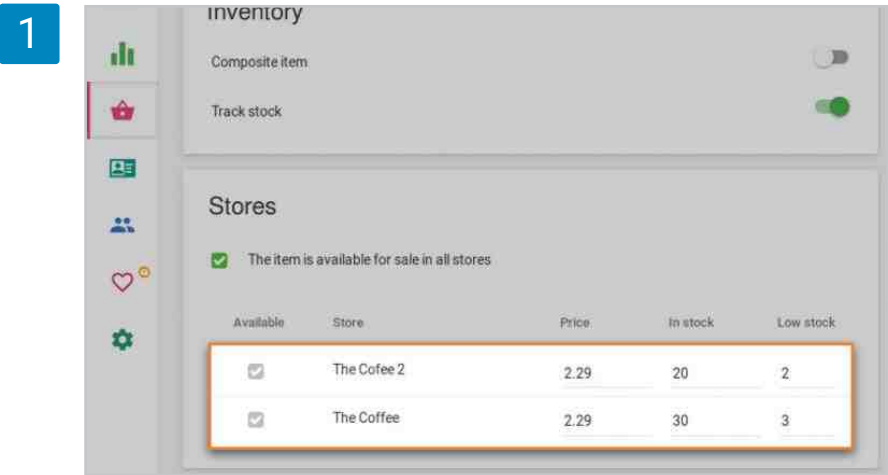
1



To add a new store in the back office, go to Settings and click on the 'Stores' button. Click on the 'Add Store' button to create a new store. Fill in the information about the new store and save.

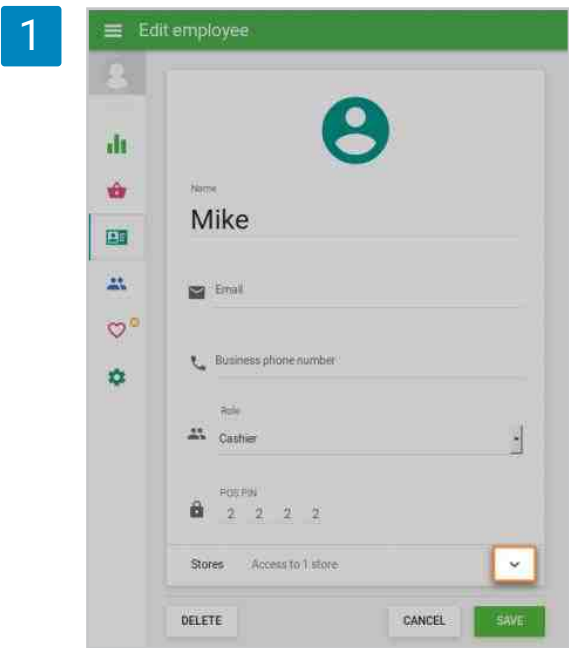
After that your store appear at the store list and you can create and assign new POS device for this store.

8.3.2 Items Management

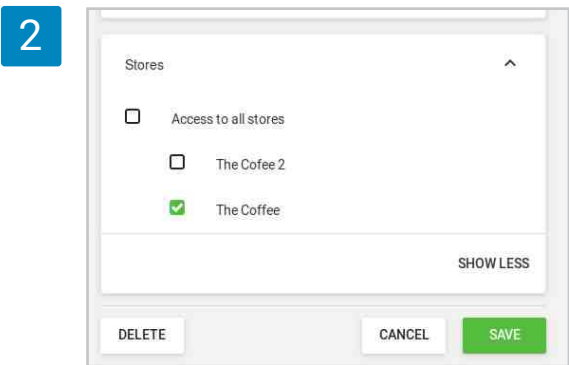


You can manage the item parameters for each store in the back office. Open your item for editing, find the 'Stores' section and change the price, in-stock quantity, and low-stock notification.

8.3.3 Employee Management

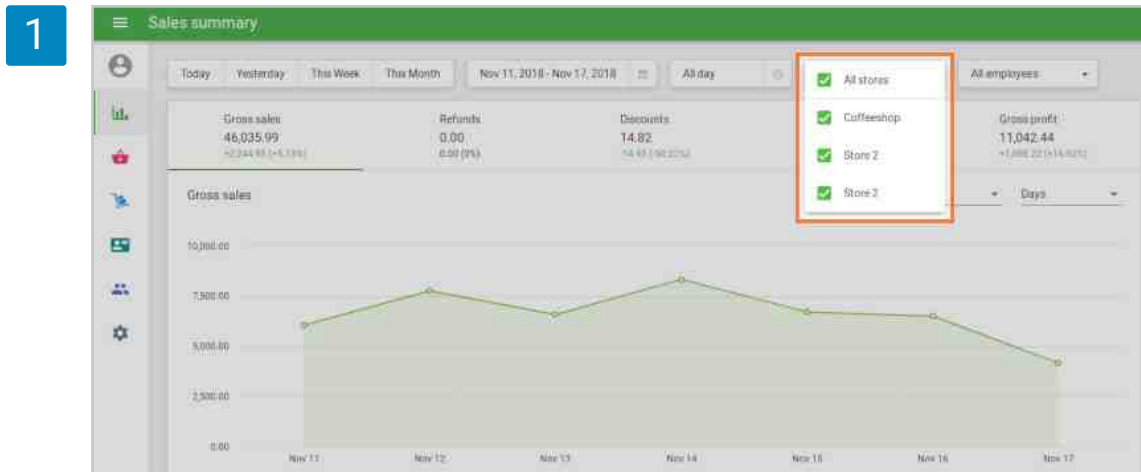


You can manage your employee access to your stores in the back office. For this, go to 'Employee list' and choose one for editing. At the bottom of the form find the 'Stores' line and click on the down arrow.



Afterwards, an additional window will slide down with the list of your stores. You can assign your employee to a particular store.

8.3.4 Sales Reports



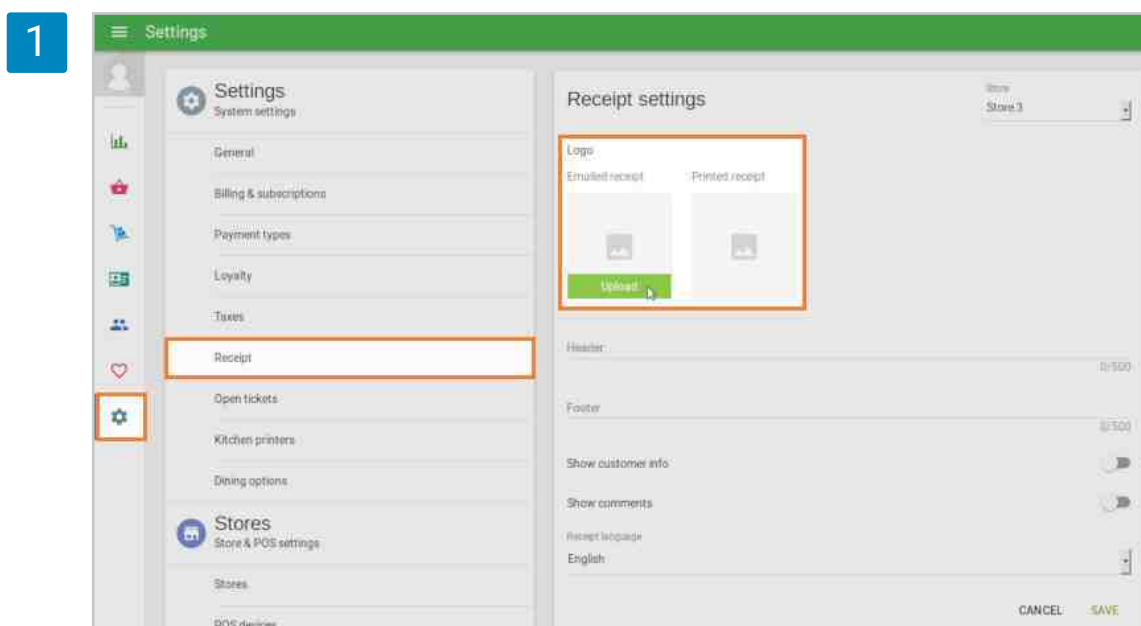
In the back office you can see all of your sale reports by selecting a filter for all or selected stores.

8.3.5 Customers

You can easily manage your clients at the Back office in a single list, across all of your stores for the loyalty program.

Customers are visible and customers points are available for redemption in all of your stores.

8.4 How to Add Logo to the Receipts



Enter the Back Office. Click on 'Settings', then go to the 'Receipts' section.

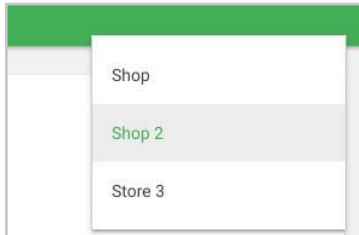
There are two fields for entering a logo. For the logo, which will appear on the emailed receipt, it is better to use a color image. Upload the digital logo by selecting an image file from your computer.

2



Logo for 'Printed receipt' should be a black and white image. If you upload the color logo, the system will generate a black and white picture from it.

3



If you have several stores, select the other stores from the drop-down list at the top right-hand corner and upload the logos for each store in the same way.

4



Now your printed logo will appear on the printed receipts as shown above.

Note

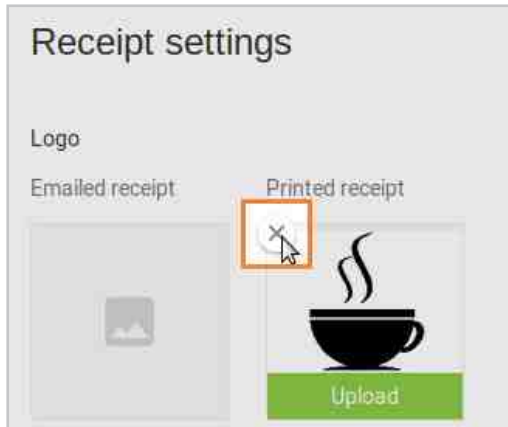
Logo will not be printed on receipts and bills if the text mode is selected in advanced printer settings.

5



The logo for Emailed receipt will appear on e-receipts.

5



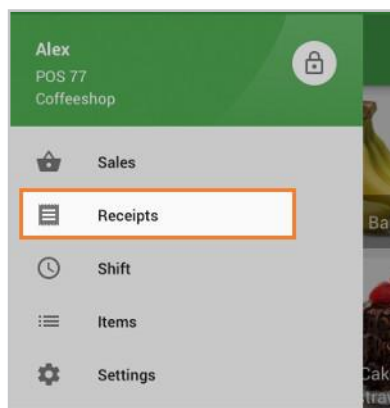
If you don't want your logo to appear on the printed or emailed receipt, you can delete it in the Back Office for the selected store.

8.5 How to Sign Out from Loyverse POS

Note

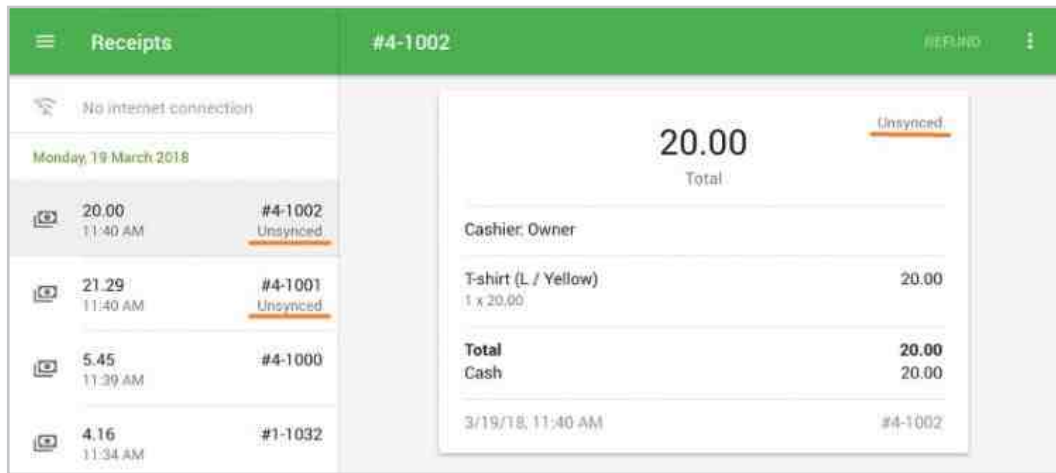
- If you make sales and sign out while your device has been disconnected from the Internet (offline mode), you can lose your receipts.
- Before signing out from Loyverse POS (Android or iOS), make sure that all your receipts have been transferred to the Back Office.

1



To do this, go to the 'Receipts' section.

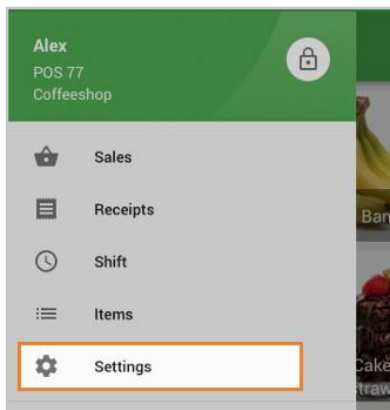
2



If you see some receipts that are non-synchronized (sales that are made during the time when there was no Internet connection) and marked 'Unsynced', do not log out. Otherwise, your unsynced receipts will be lost.

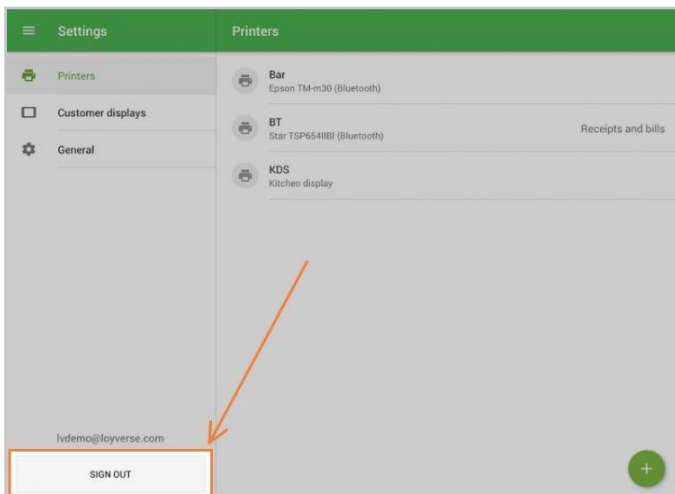
Try to restore the Internet connection and get the list of all receipts synced.

3



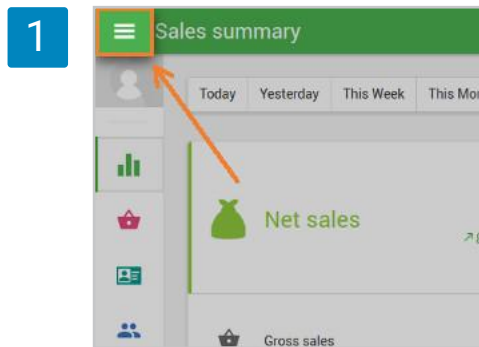
To do this, go to the 'Receipts' section.

1

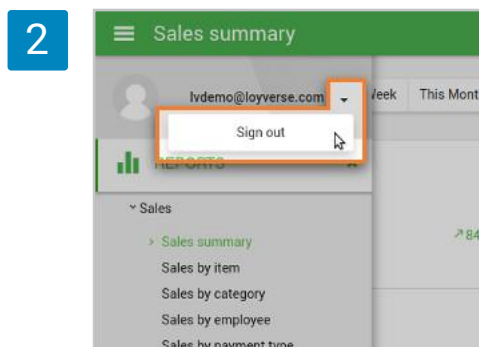


Click 'Sign out' button.

8.6 How to Exit from the Back Office



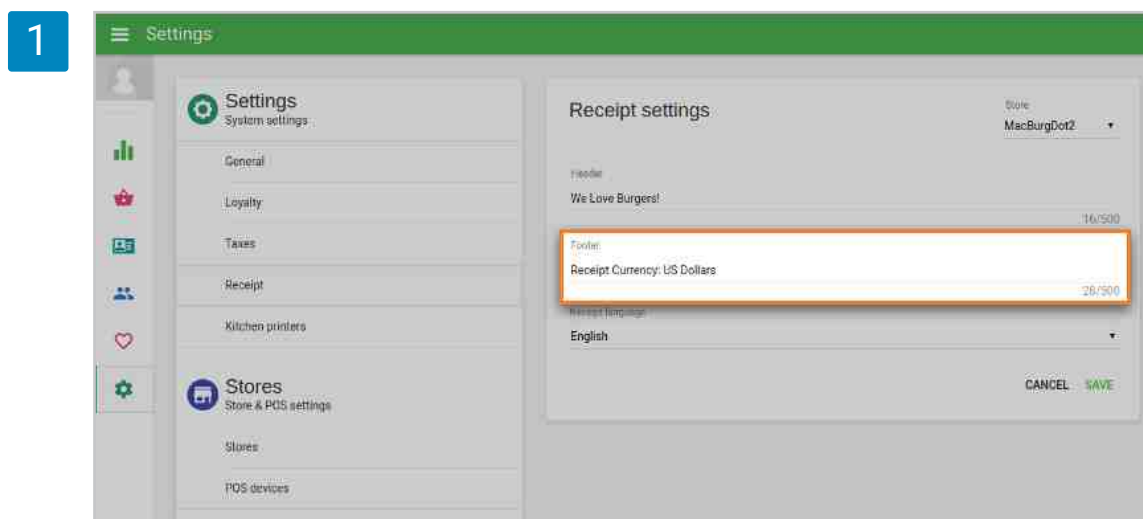
For sign out from your account in Back office, go to menu.



By clicking on account email you will see drop down button 'Sign out'. Click on it.

8.7 How to Set the Currency

All the amounts and prices on the receipt are not specified by any currency, just by a number. However, for paper receipts you can change the settings to add text (your desired currency) at the end of the receipt.



In your Back Office go to 'General Settings' and choose 'Receipt' menu. In the 'Footer' field, specify your currency.

2

MacBurgDot	
145 Marsh Ln, River John, NS B0K 1N0, Canada	
We Love Burgers!	
Cashier: Owner	
POS: pos2	
<hr/>	
Cola	3.00
1 x 3.00	
Luncheon	5.00
1 x 5.00	
Sandwich	5.00
1 x 5.00	
<hr/>	
Total	13.00
Sales Tax 10%	1.19
Cash	13.00
<hr/>	
Receipt Currency: US Dollars	
<hr/>	
21.02.2017 16:13	#1008

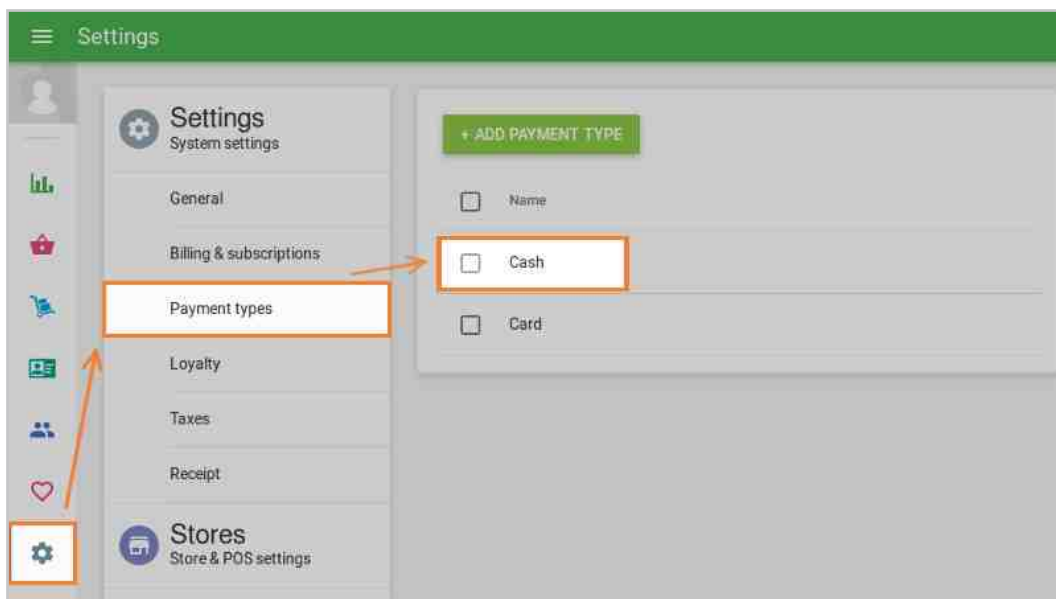
The message will appear on each receipt as shown below.

8.8 How to Work with Cash Rounding

When the cash rounding is applied, the amount payable for a cash transaction is rounded to the nearest rounding interval with specified rounding rule, whereas transactions paid in other ways are not rounded.

Cash rounding can be used in countries where coins are withdrawn from circulation. Also in some countries, rounding is allowed at the discretion of the merchant (for example, if the merchant wants to reduce the amount of small change in revenue). Rounding does not affect the amount of taxes.

1



Log in to the Back Office, click the Settings menu and then Payment types. Click the Cash type of payment.

2

The form 'Edit payment type' will open for editing.

3

You can select the rounding interval from the drop-down list. For countries with decimal currency: 0.01, 0.05, 0.10, 0.50, 1.00. For countries without decimals: 1, 5, 10, 50, 100.

4

By default, the rule 'Round to the nearest value (average value up)' is selected, but you can also choose:

- Round to the nearest value (average value down)
- Always round up
- Always round down.

5

You will see the explanation of how the selected rounding rule works.

6

Ticket		← SPLIT			
T-shirt x 1 S / Red	20.00	<div>21.29</div> <div>Total amount due</div>			
Apple x 1	1.29				
Total	21.29				
		<div>Cash received</div> <div>21.00</div>	<div>CHARGE</div>		
		25.00	30.00	40.00	50.00

Ticket			
T-shirt x 1 S / Red	20.00	<div>21.00</div> <div>Total paid</div> <div>4.00</div> <div>Change</div>	
Apple x 1	1.29		
Total	21.29		
		<div>Enter email</div>	<div>SEND RECEIPT</div>

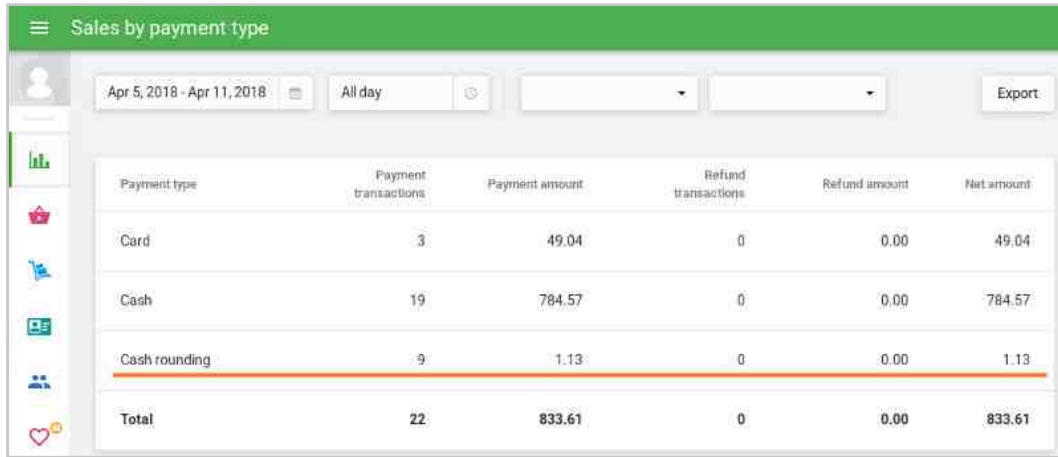
If you enter the value of the received amount of cash and tap 'Charge', you will see the change in the next screen with the consideration of rounding.

7

Receipts		#29-1004	REFUND
<div>Search</div>			
Thursday, May 23, 2019			
21.29 4:55 PM	#29-1004	<div>21.29</div> <div>Total</div> <div>Cashier: Alex POS: POS 09</div> <div>T-shirt (Red / S) 1 x 20.00</div> <div>20.00</div> <div>Apple 1.000 x 1.29</div> <div>1.29</div> <div>Total</div> <div>21.29</div> <div><u>Cash rounding</u></div> <div>0.29</div> <div>Cash</div> <div>25.00</div> <div>Change</div> <div>4.00</div> <div>5/23/19 4:55 PM</div> <div>#29-1004</div>	
69.52 4:09 PM	#8-1565		
Wednesday, May 22, 2019			
842.39 11:08 AM	#11-1216		
23.39 11:08 AM	#11-1215		
Tuesday, May 14, 2019			

The receipt contains information about rounding.

8

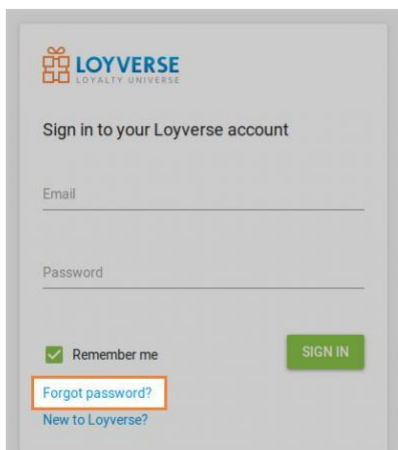


Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	3	49.04	0	0.00	49.04
Cash	19	784.57	0	0.00	784.57
Cash rounding	9	1.13	0	0.00	1.13
Total	22	833.61	0	0.00	833.61

You will also see the information about rounding in the Sales by Payment Type report in the Back Office.

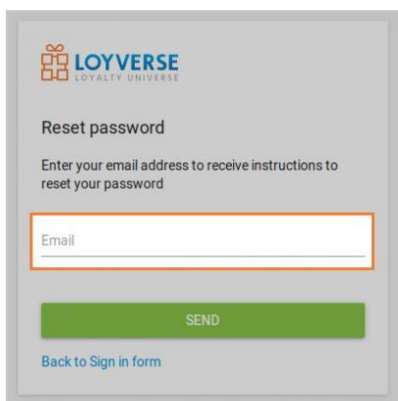
8.9 How to Change/Recover Your Password for the Back Office

1



To change or recover your password, go to your back office login form: <https://loyverse.com/signin> and click "Forgot password?".

2



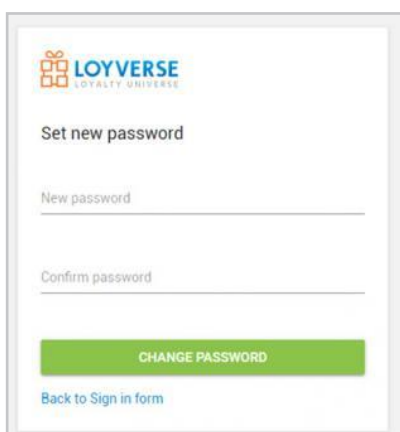
Type your Email into the Reset password form and press 'Send'.

3



Now check the password recovery instructions which are sent to your email. Sometimes emails are filtered as spam, so if it's missing from your inbox, try the spam folder. Once you're in the email, click on the 'Create a new password' link.

4



The link brings you to a Set new password form with two password fields. Type your password twice to confirm, then click 'Change password'.

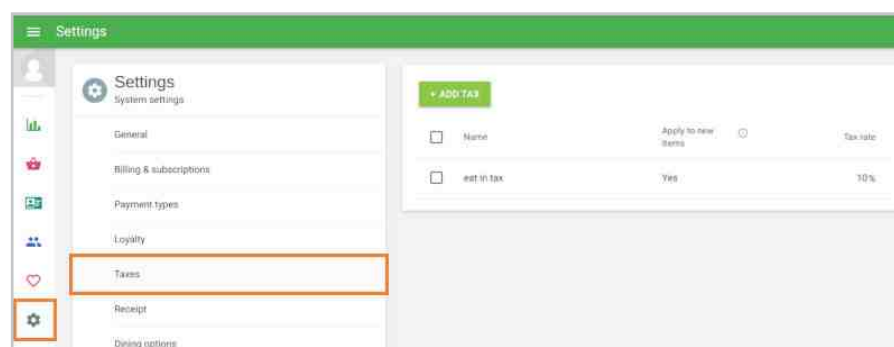
You'll then be referred to the Back Office.

8.10 How to Apply Taxes Depending on the Dining Options

In some countries, the tax on certain goods depends on the dining options. For example, if the customer orders food for takeout, it is not taxed. But in the case of consuming the same food inside the cafe, it is taxed.

Please be sure that the Dining Options is activated in the Back Office.

1



Go to the 'Taxes' section in the 'Settings' in the Back office. Open the existing tax to edit or create a new one.

2

Switch on the 'Tax application depends on dining option'.

Click on the 'Select' button to choose the dining option for which an exemption of the tax applies.

3

For example, if you want your tax to apply only for 'Dine in', select all other options: 'Takeout' and 'Delivery'.

4

Click on the 'Select' button to choose items not subject to tax.

You can select the whole category or certain items that are excluded from tax.

5

After you have set the exceptions for application of your tax, you will see their short description. You can edit them or save changes.

6

If you have several stores, you can select the availability of the tax for each store.

You will also see the information about the applied dining option in the item edit card.

During a sale, the system removes the tax from items in the ticket to which it should not be applied according to the settings and exceptions made for the dining option, so that the cashier does not need to remove it manually.

Note

The cashier can also change the application of the tax to the item manually during the sale, but this change would be applied only to the items in the current ticket.

9. Hardware



9.1 Supported Printers

Note

Please pay attention not only to the printer model but also on the interface through which this model works. If some model of the printer works with one interface, it may not work through another interface.

9.1.1 Printers Compatible with Loyverse POS on Android Devices

- Star TSP650II / TSP654IIBI (Bluetooth);
- GP-58130IIC (Bluetooth);
- GP-L80250II (Ethernet);
- GP-58130IIC (Ethernet);
- GP-U80300I (Ethernet);
- Star TSP 100 / TSP143IIILAN (Ethernet);
- Star mc-Print3 (USB, Bluetooth, Ethernet);
- Epson TM-T20II (Ethernet);
- Epson TM-88IV (Ethernet);
- Epson TM-T88V (Ethernet);
- Epson TM-m30 (USB, Bluetooth, Ethernet);
- Posiflex Aura 6900 (Ethernet);
- Xprinter XP-Q200 (Ethernet);
- XPrinter XP-Q800 (Ethernet);
- Star mPOP (Bluetooth);
- EastRoyce ER-58A (Bluetooth);
- EastRoyce ER-80A (Bluetooth);
- Sam4s GIANT-100D (Ethernet, USB)

However, for Android, you can try to connect another model, not from the Supported printers list. But be aware that not every printer may work with Loyverse POS!

9.1.1 Printers Compatible with Loyverse POS on iOS Devices

These are general requirements for a receipt printer to be compatible with Loyverse POS on iOS devices:

- support ESC/POS protocol;
- have Ethernet, Bluetooth or USB (Bluetooth and USB only recommended models) interface.

Consult printer manual or manufacturer website to see if your receipt printer fits these requirements. If so, the printer may work with Loyverse POS, however, there might be special cases. To be 100% sure, please use a printer from the list of recommended models below:

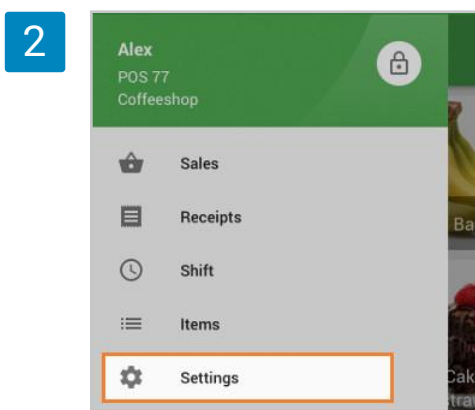
- Star TSP654IIBI (Bluetooth);
- Star mPOP (Bluetooth);
- Star TSP 100 (Ethernet);
- Star TSP143IIILAN (Ethernet);
- Star TSP654IILAN (Ethernet);
- Star SP743 (Ethernet) **Note:** this is matrix printer, it can print only kitchen orders and cannot print bills and receipts;
- Star SP700 (Ethernet) **Note:** this is matrix printer, it can print only kitchen orders and cannot print bills and receipts;
- Star TSP143IIIU (USB);
- Star mC-Print3 (USB, Bluetooth, Ethernet);
- Star SM-T300i (Bluetooth);
- Star SM-S210i (Bluetooth);
- Epson TM-T20II (Ethernet);
- Epson TM-T88VI-i (Ethernet);
- Epson TM-m30 (Ethernet);
- Epson TM-m30 (Bluetooth);
- Epson TM-P20 (Bluetooth)
- Sam4s GIANT-100D (Ethernet).

9.2 How to Set Up an Ethernet Printer in Loyverse POS

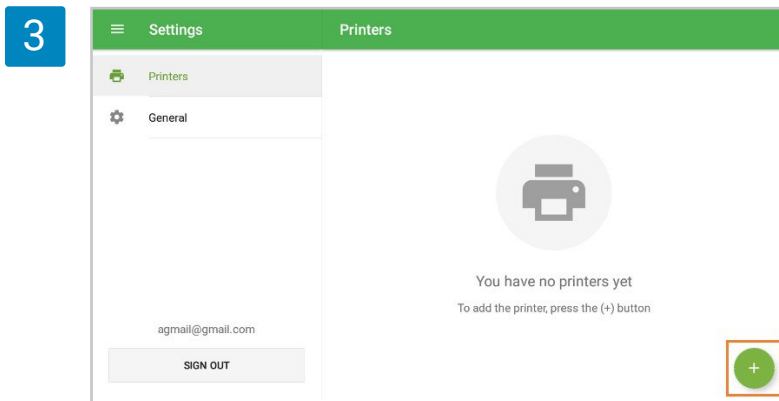
For an Ethernet printer to work with Loyverse POS (Android, iOS), you will need the following:

1. Smartphone or tablet with the Loyverse POS app;
2. Ethernet printer, supported by the Loyverse POS app;
3. WiFi router;
4. Ethernet cable.

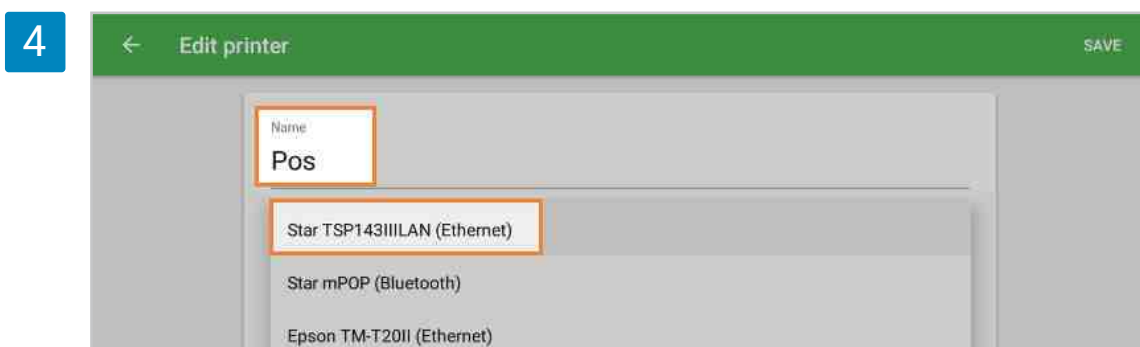
- 1 Plug one end of the ethernet cable into the 100/10 Base port of the printer, and the other end into the LAN-port of the router.



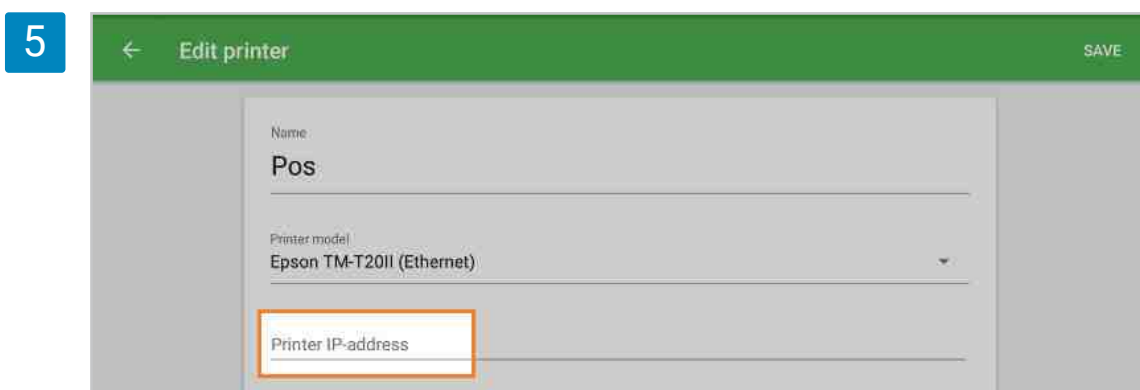
In the Loyverse POS app, go to Settings.



Create a printer by tapping on the '+' button.



Type the title of your printer in the 'Name' field and select your printer model from the drop-down list.

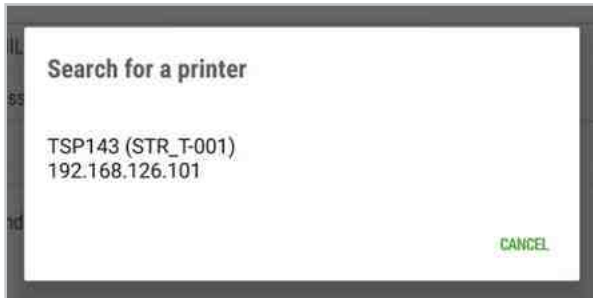


Fill in the 'Printer IP-address' field that you can find in your printer's network configuration report.



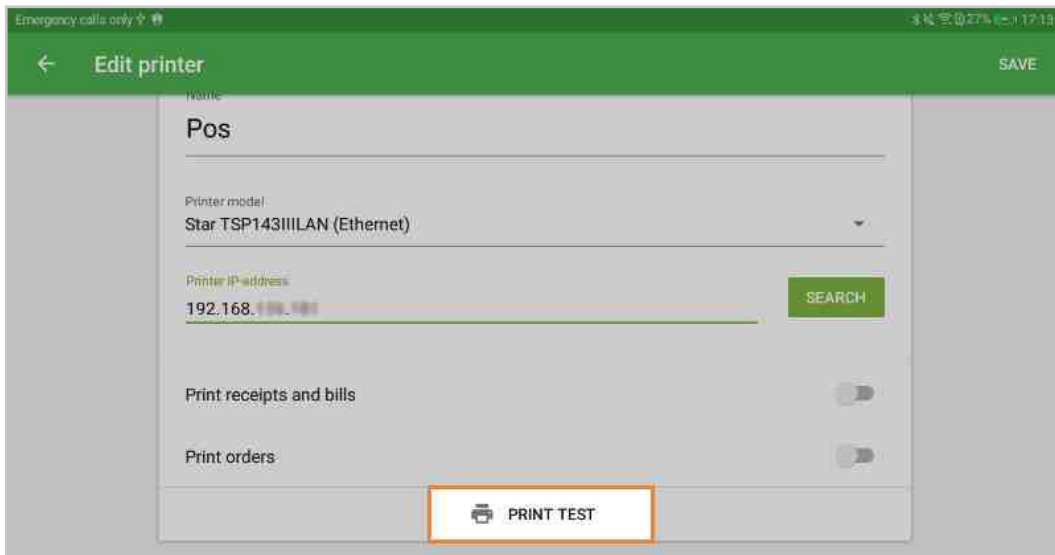
Some printers have the 'Search' button to search for the IP address of your printer automatically. If your Ethernet printer has it, just tap it without filling in the 'Printer IP-address' field.

7



In the following pop up window, you will see the search result with the printer model and its IP address. Tap on it to select the IP-address and then close the window.

8



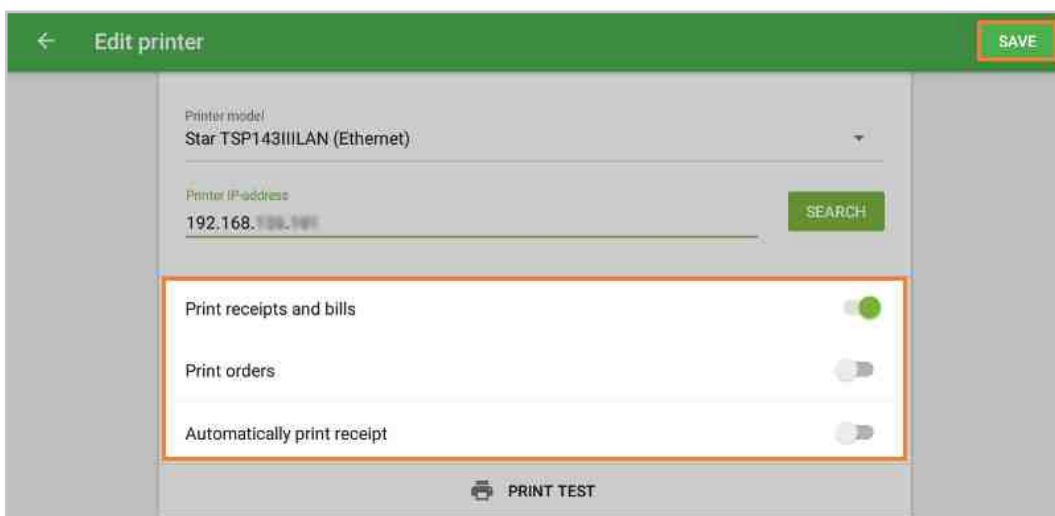
Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.

9



If a test receipt prints out successfully, then your printer is set up correctly.

10



Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the 'Save' button.

11

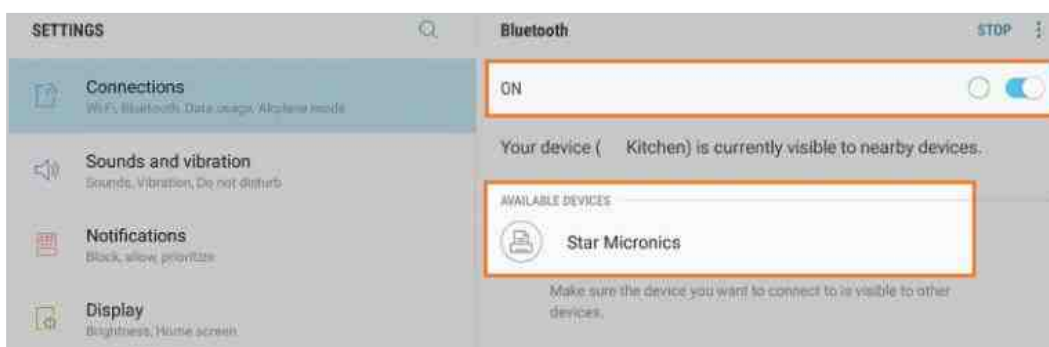


Now you can see your printer in the list. Nice work!

9.3 How to Set Up Bluetooth Printer with Loyverse POS

This guidance applies to printers on our supported printers list.

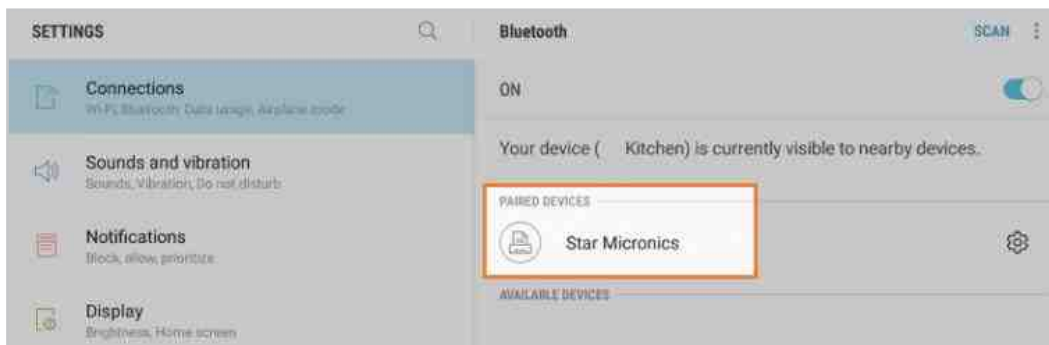
1



Turn on your printer. In your mobile device, go to Settings > Bluetooth, and turn the 'Bluetooth' on. A Bluetooth device search will begin, and you will see your printer on the list.

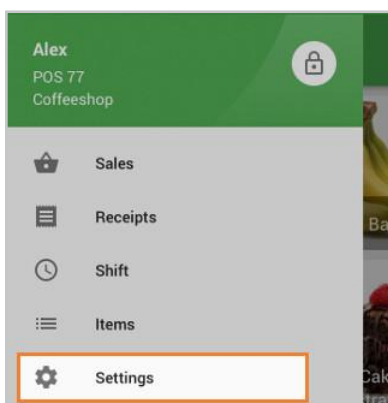
Push the 'Pair' button on your printer.

2

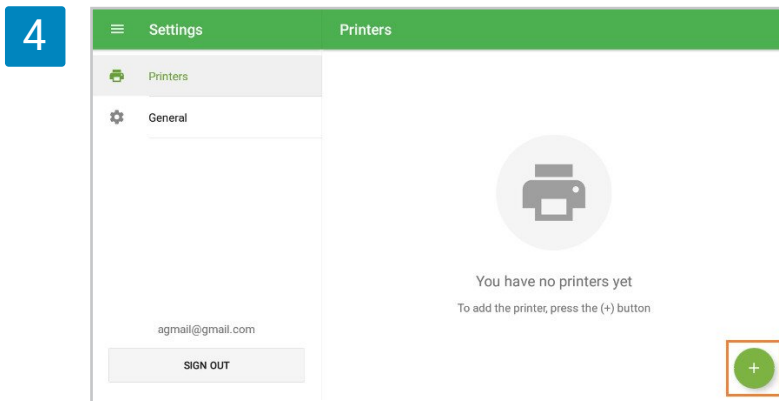


On your mobile device, choose your printer's model from the list of 'Devices'. After a few seconds, the 'Not Paired' status will change to 'Connected' or 'Paired'.

3



In the Loyverse POS app, go to Settings.



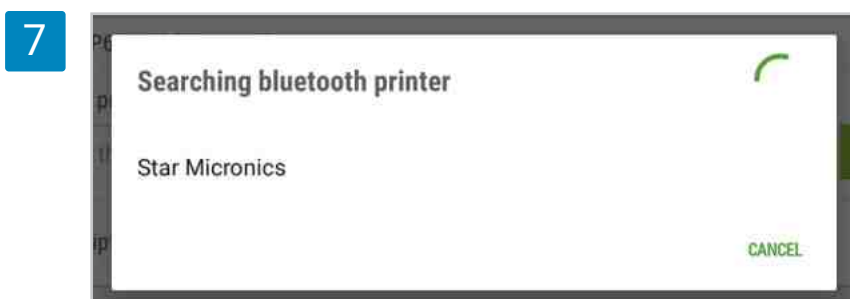
Create a printer by tapping on the '+' button.



Type the title of your printer in the 'Name' field and select your printer model from the drop-down list.



Tap the 'Search' button to search for your printer.



In the following pop up window, you will see the search result with the printer model. Tap to select and close the window.

8

Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.

9



If a test receipt prints out successfully, then your printer is set up correctly.

10

Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the 'Save' button.

11



Now you can see your printer in the list. Nice work!

9.4 How to Set Up a USB Printer with an iOS Device

For a USB printer to work with Loyverse POS on iOS, you will need the following:

1. iPad or iPhone with the Loyverse POS app
2. USB printer, supported by the Loyverse POS app on iOS devices (currently only supports Star TSP143IIIU (USB) and Star mc-Print3 (USB) models. Other USB printers will not work).
4. Lightning cable – please use a genuine cable manufactured by Apple or one that is MFi certified.

1



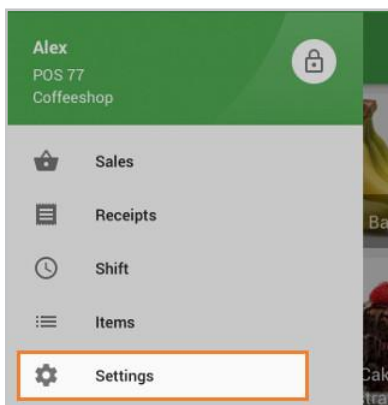
Connect the Lightning cable to the USB Type-A port of the printer.

2

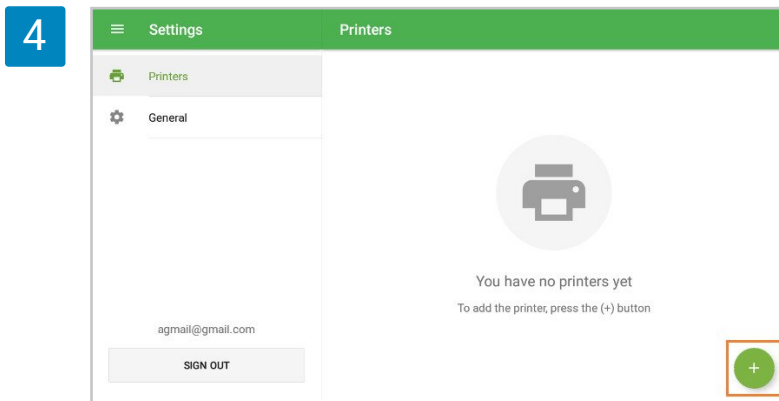


Connect the other end of the cable to the smartphone/tablet.

3



In the Loyverse POS app, go to Settings.



Create a printer by tapping on the '+' button.



Name your printer in the 'Name' field and select the model of your USB printer from the 'Printer model' list.



Tap the 'Search' button to search for your printer.



In the following pop up window, you will see the search result with the printer model. Tap to select and close the window by tapping 'OK'.

8

Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.

9



If a test receipt prints out successfully, then your printer is set up correctly.

10

Choose the settings for your printer depending on how you want to use it. Don't forget to save all of the settings at the end by tapping the 'Save' button.

11

Now you can see your printer in the list. Nice work!

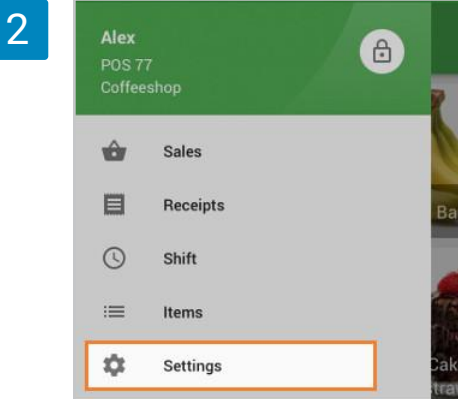
9.5 How to Set Up a USB Printer with an Android Device

For a USB printer to work with Loyverse POS, you will need the following:

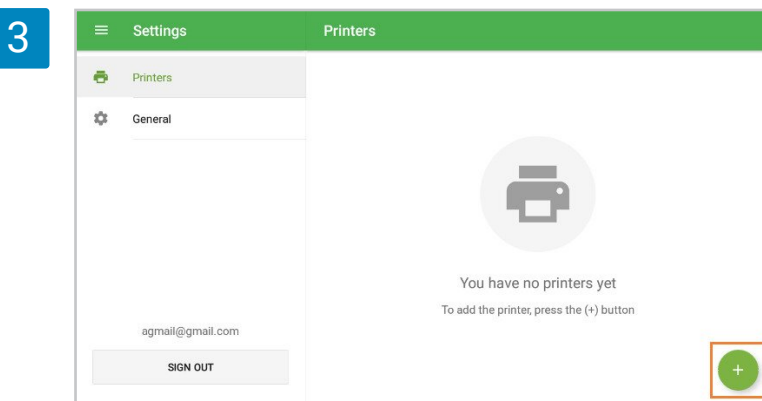
1. Smartphone or tablet (with OTG support) with the Loyverse POS app;
2. USB printer, supported by the Loyverse POS app (should support ESC/POS protocol);
3. USB type A to type B cable (goes together with the printer);
4. USB OTG adapter or cable;
5. USB Hub if you want to connect several printers.

- 1 Plug one end of the USB cable into the USB port of the printer, and the other end into the female USB connector of an OTG adapter or cable. Then, plug the micro-USB end of the OTG adapter or cable into the micro-USB port of your mobile device, and wait for the system to recognize the printer.

If you want to connect several printers, connect them via the USB Hub. The USB Hub connects to your mobile device through a USB OTG adapter or a cable.



In the Loyverse POS app, go to Settings.



Create a printer by tapping on the '+' button.



Name your printer in the 'Name' field and select 'Other model' from the 'Printer model' list.

5

Select 'USB' in the 'Interface' field.

6

Now, select your printer from the drop-down menu. USB Printers are named in USB:VID-PID format. VID stands for Vendor ID, and PID is the Product ID.

7

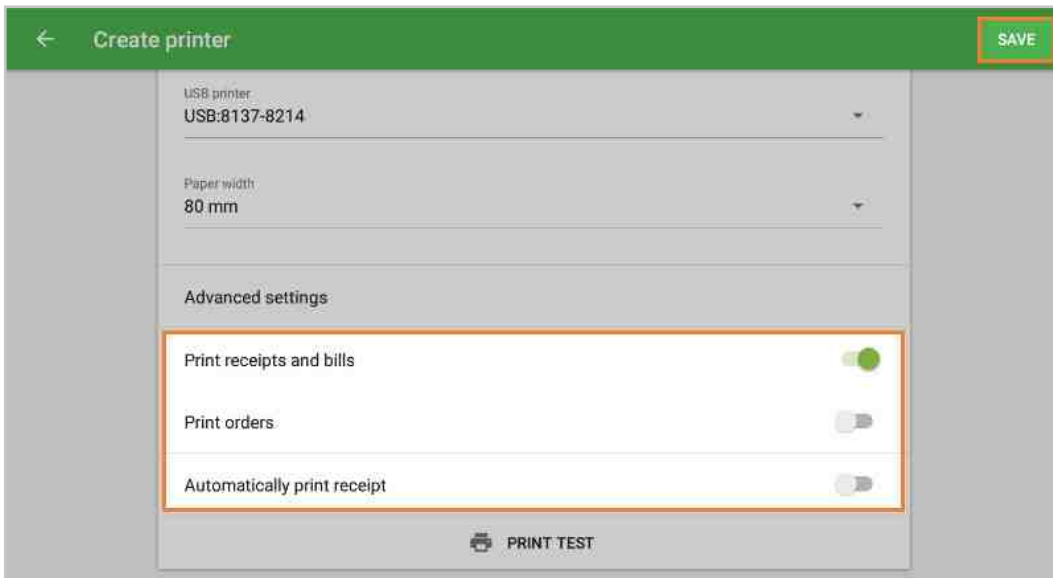
Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.

8



If a test receipt prints out successfully, then your printer is set up correctly.

9



Choose the settings for your printer depending on how you want to use it. Don't forget to save all of the settings at the end by tapping the 'Save' button.

10



Now you can see your printer in the list. Nice work!

9.6 How to Set Up Other Printers in Loyverse POS

Loyverse POS works with receipt printers on the Supported Printers list. However, for Android, you can try to connect to models that are not on the Supported Printers list. But be aware that not every printer may work with Loyverse POS!

These are the general requirements for a receipt printer to be compatible with Loyverse POS on Android devices:

- support ESC/POS commands that are the same as Epson printers;
- have either Ethernet, WiFi, Bluetooth or USB interface;
- support the status commands or similar functions to check that the transmitted data has been completely printed.

Consult the printer manual or the manufacturer website to see if your receipt printer fits these requirements. If so, the printer may work with Loyverse POS; however, there might be special cases.

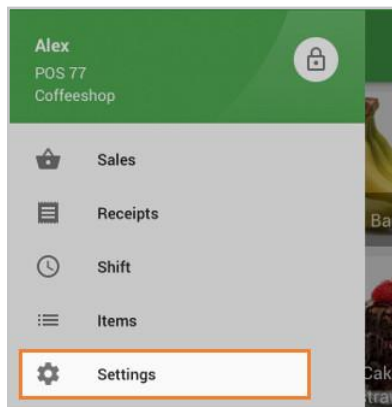
1 Connect or pair your printer with a mobile device

For Ethernet printer: connect your mobile device to the Wi-Fi router and connect your Ethernet printer to the router via an ethernet cable.

For Bluetooth printer: pair a printer with your mobile device.

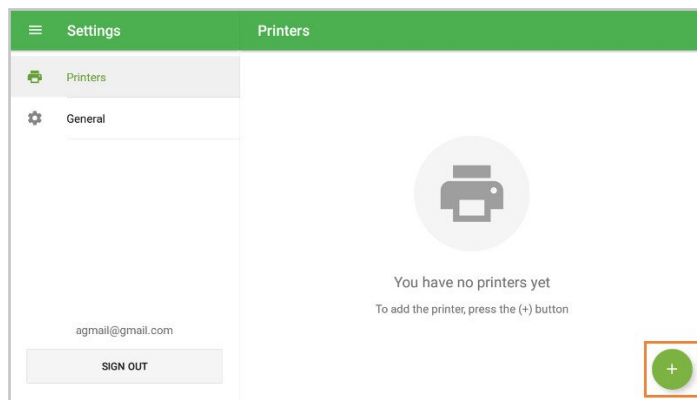
For USB printer: connect your mobile device to the USB printer via a USB cable and OTG adapter or cable.

2



In the Loyverse POS app, go to Settings.

3



Create a printer by tapping on the '+' button.

4



Name your printer in the 'Name' field and select 'Other model' from the drop-down list of printer model.

5

Select your printer interface in the 'Interface' field.

6

For Ethernet printer

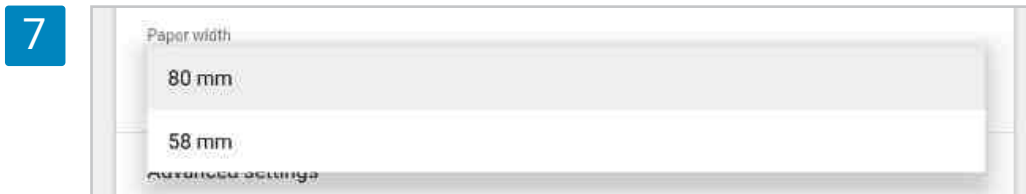
Fill in the 'Printer IP-address' field, which can be found in your printer's network configuration report.

For Bluetooth printer

Tap the 'Search' button to search for your printer and in the following pop-up window, select your printer.

For USB printer

Select your printer from the drop-down menu. USB Printers are named in USB: VID-PID format. VID stands for Vendor ID, and PID is the Product ID.



Choose the paper width of your printer.



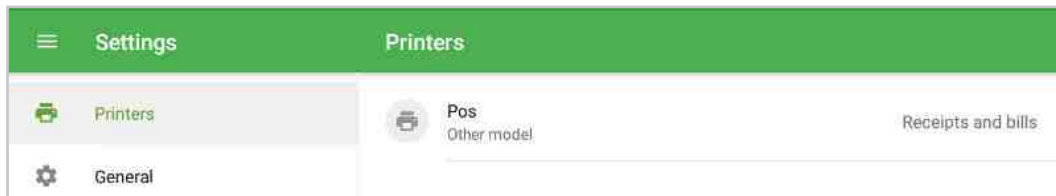
Tap the 'Print test' button to check your printer's connection with the Loyverse POS app.



If a test receipt prints out successfully, then your printer is set up correctly.



Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the 'Save' button.



Now you can see your printer on the list. You are ready to start selling and printing receipts or orders.

9.7 Troubleshooting when Setting Up an Ethernet Printer

When you cannot set up an Ethernet printer with Loyverse POS (Play Market or App Store), it's a good possibility that either the printer is experiencing a hardware issue, or you have a network related issue. We always recommend testing the printer for hardware issues before testing the network.

Testing Hardware Issues

- Check that the paper is loaded and that there are no paper jams.
- Check the cable connections; both power and ethernet cables going from the printer and Wi-Fi router.
- Ensure that the printer and router power indication lights are on.
- Verify that the printer has no flashing lights or Red lights since this usually occurs with malfunctions.

Network Related Issues

1

Check if your mobile device is connected to the Wi-Fi network provided by the Wi-Fi router, plugged into the receipt printer.



In the settings on your mobile device check the network you are connected to. If not connected to your Wi-Fi router, choose your Wi-Fi network to connect to it.

Next, verify that the receipt printer and the router are on the same subnet.

On your receipt printer, you need to print a network configuration report by following these steps:

- Turn the printer's power switch off;
- Hold down the FEED button located on the front of the printer;
- While continuing to hold the FEED button down, turn the power switch on;
- The lights should flash for a few seconds, and then one or two pages should print out with a configuration report;
- You can now release the FEED button.

```

*****
Network Configuration
*****

MAC Addr : 00:11:62:07:17:EA

IP Address      :0.0.0.0
Subnet Mask     :0.0.0.0
Default Gateway :0.0.0.0
DHCP            :ENABLE

"user" Login Password : "guest"
"root" Login Password : "*****"
9100 Multi Session  :ENABLE
Disconnect Message  :ENABLE

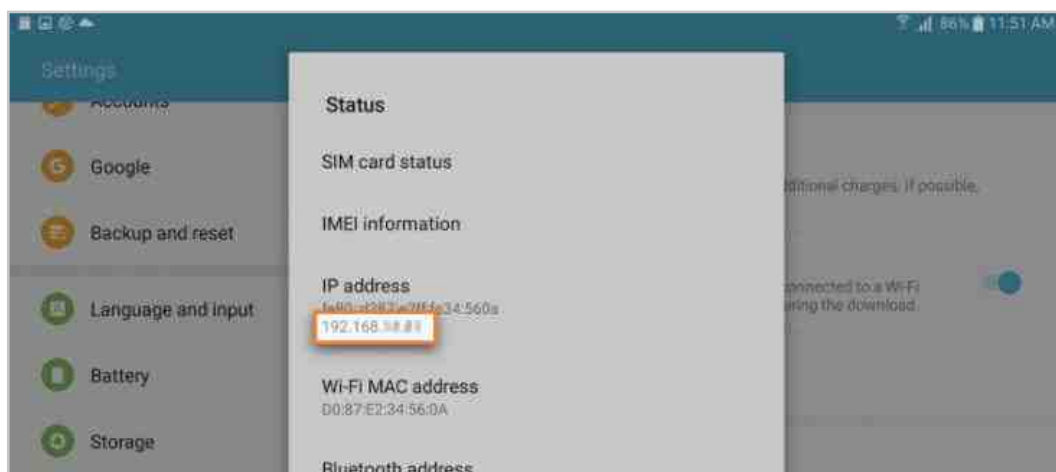
*****
Current IP Parameters Status
*****
IP Address      : 192.168.126.1 (DHCP)
Subnet Mask     : 255.255.255.0
Default Gateway : 192.168.126.1

```

You can find the IP address of your printer under the "Current IP Parameters Status" section (underlined by orange above).

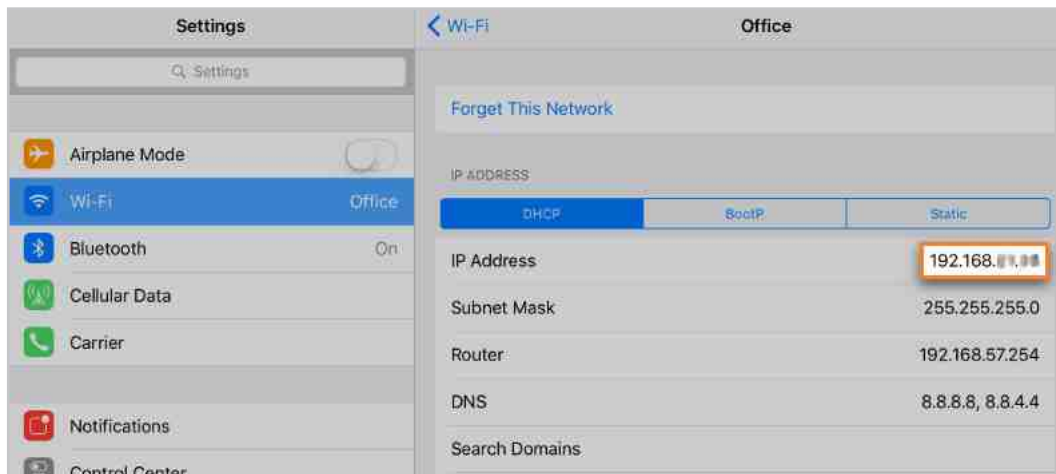
Then, you have to check the IP address of your router network. It is possible to do on your mobile device, connected to your router's Wi-Fi.

On Android mobile devices



Go to Settings, and in the 'About device' menu, tap Status and check the IP address line.

On Apple mobile devices



Go to Settings and just tap your active Wi-Fi connection.

- **Compare the two IP addresses: receipt printer 1 and router 2 or 3.**
- **Both of the first three groups of numbers should be the same. If they are not, that means the two devices are on the different subnet.**
- **You have to change the IP address either at the receipt printer or at your router. How to do it, refer to user manuals of these devices or contact your network administrator.**
- **4th groups of numbers have to be different.**

Note

Loyverse POS communicates with an Ethernet receipt printer via port 9100. If your printer has been set to another port, change the printer settings to port 9100. Refer to user manuals of a printer for information on how to do this.

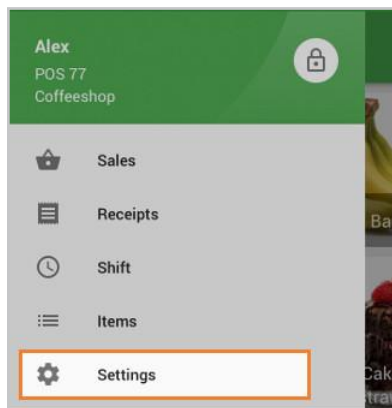
9.8 Connecting Built-in Printers on Sunmi Devices

Loyverse POS app for Android is compatible with built-in printers on Sunmi devices.

The list of supported Sunmi devices:

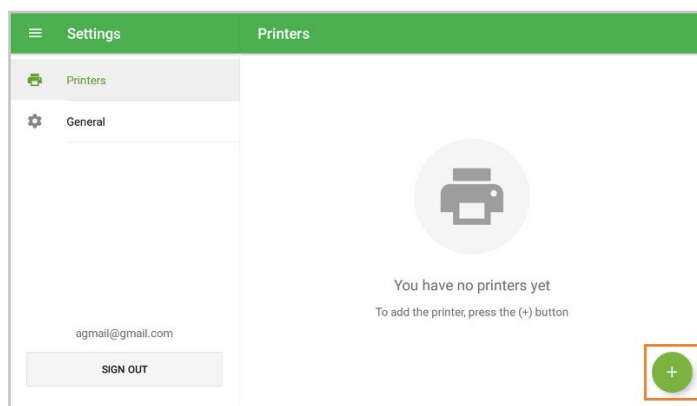
Sunmi V1
Sunmi V1S
Sunmi V2
Sunmi V2 pro
Sunmi T1 mini
Sunmi T2 mini
Sunmi D2 mini
Sunmi T2
Sunmi S2
Sunmi M2.

1



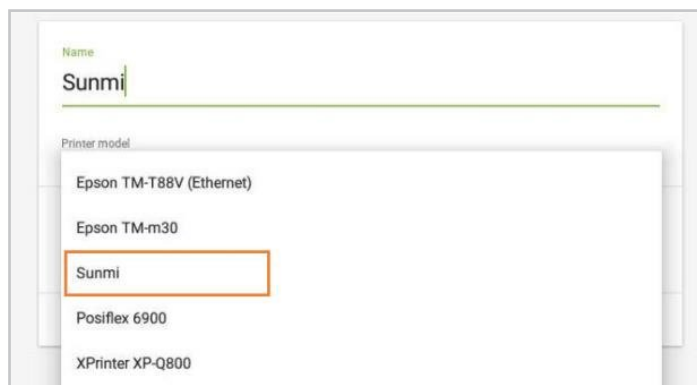
To connect internal printers on Sunmi devices, start the Loyverse POS app and go to Settings.

2



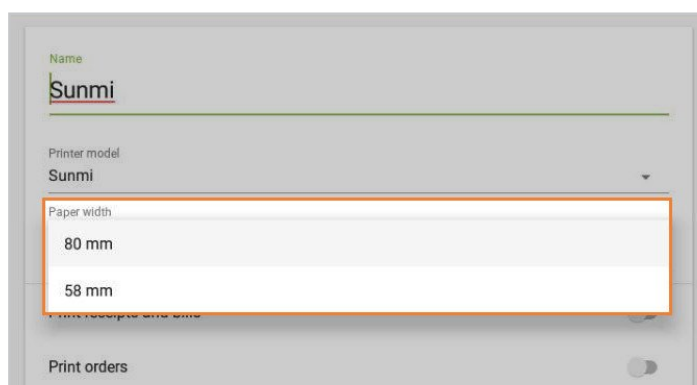
Create a printer by tapping on the '+' button.

3



Type the title of your printer in the 'Name' field and select Sunmi from the drop-down menu of printers models.

4



Select 'Paper width' of the printer.

5

Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.

9

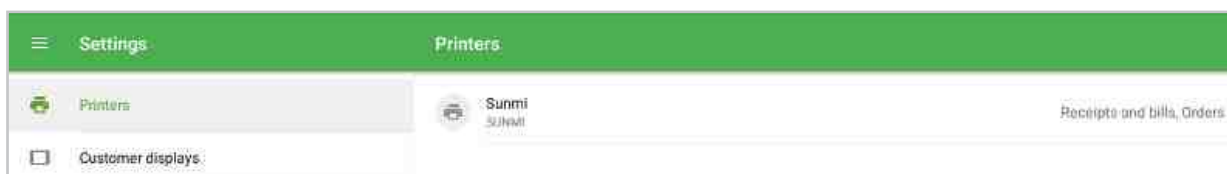


If a test receipt prints out successfully, then your printer is set up correctly.

10

Choose the settings for your printer depending on how you want to use it. Don't forget to save all of the settings at the end by tapping the 'Save' button.

11



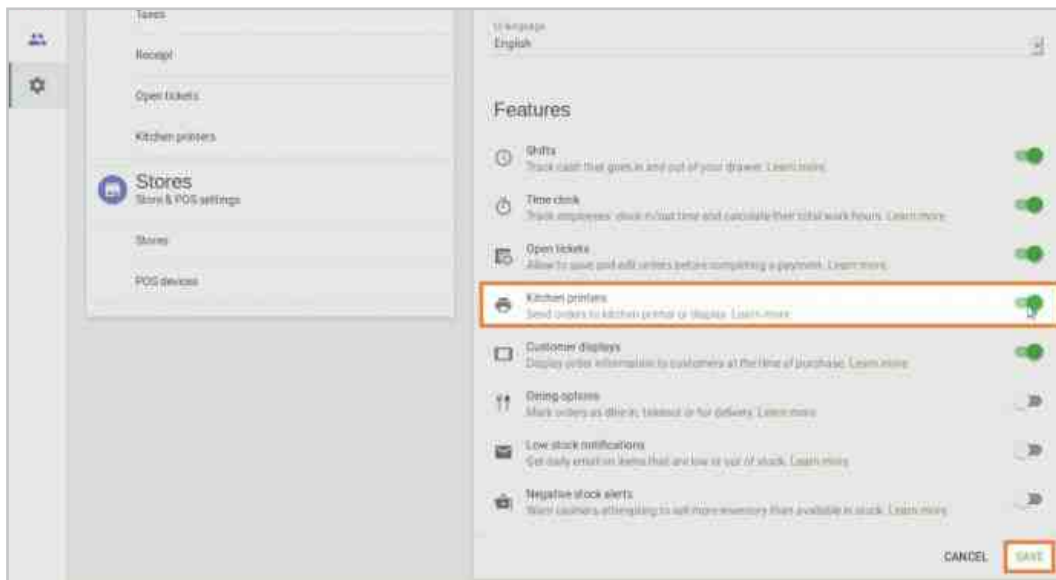
Now you can see your printer in the list.

9.9 Using Kitchen Printers with Loyverse POS

Cafes and restaurants use kitchen printers to inform the cooking staff what to prepare from an order.

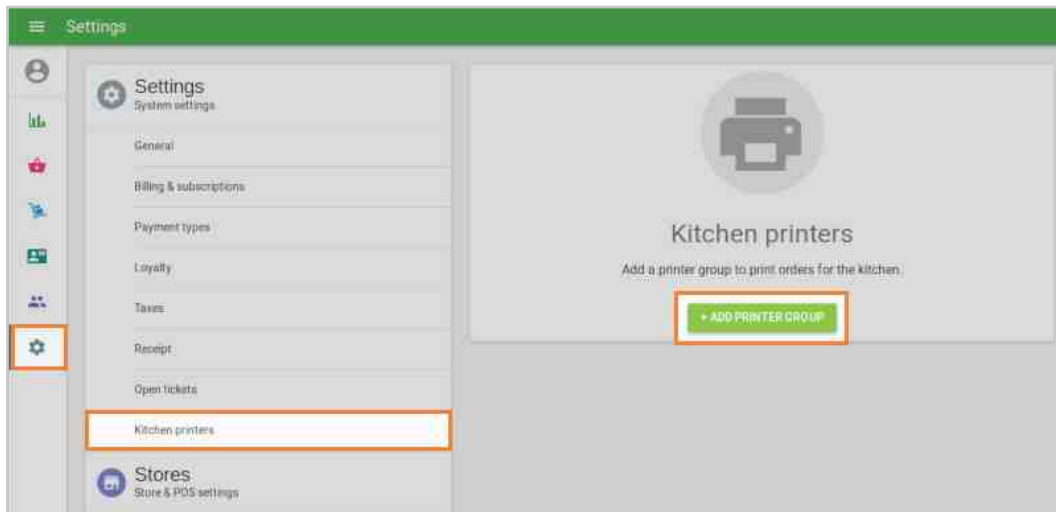
9.9.1 Configuring Loyverse Back Office

1



Log in to the Back Office, navigate to the Settings menu, scroll to General Settings and switch on the Kitchen Printers slider.

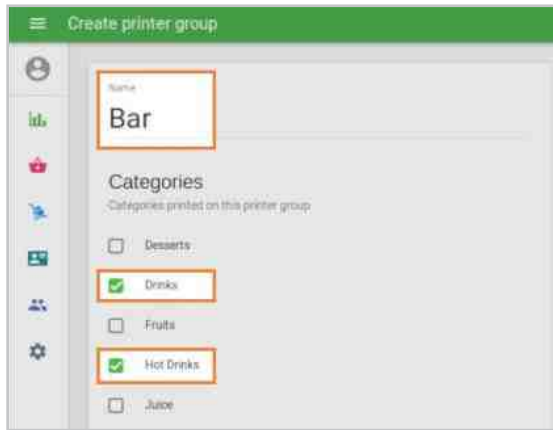
2



Click the Kitchen Printers menu and create a printer group.

Give the printer group a meaningful name. A printer group typically corresponds to the printer location – bar, kitchen, kitchen station, etc. Therefore, the recommended practice is to use the printer location as the printer group name.

3

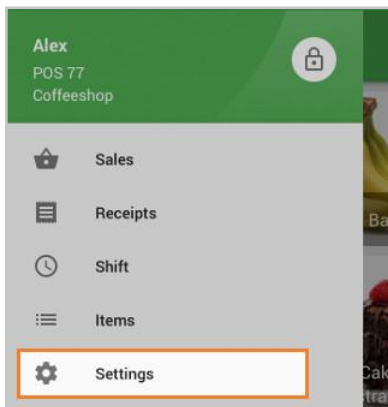


Tick item categories that should be included in this printer group and save your selection.

9.9.2 Setting Up the Loyverse POS App

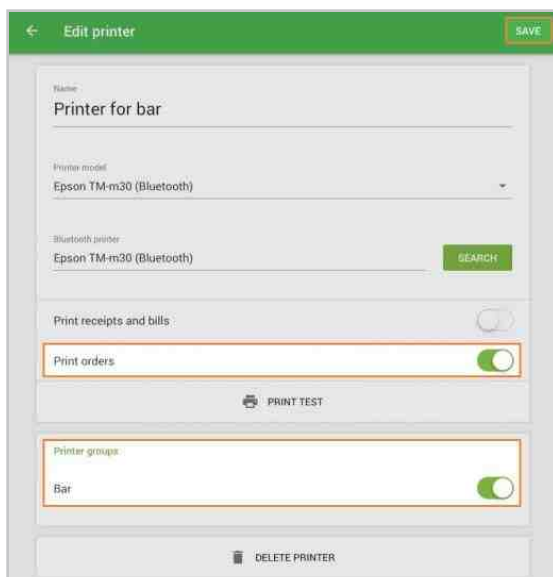
Using the Loyverse POS app (Play Market or App Store), assign an actual printer to a certain printer group.

1



Open the Settings menu and select the printer you will use to print the orders for the kitchen or add a new one.

2



Specify that this printer will print orders. Switch on “Print orders”, select the proper printer group and save your settings.

3



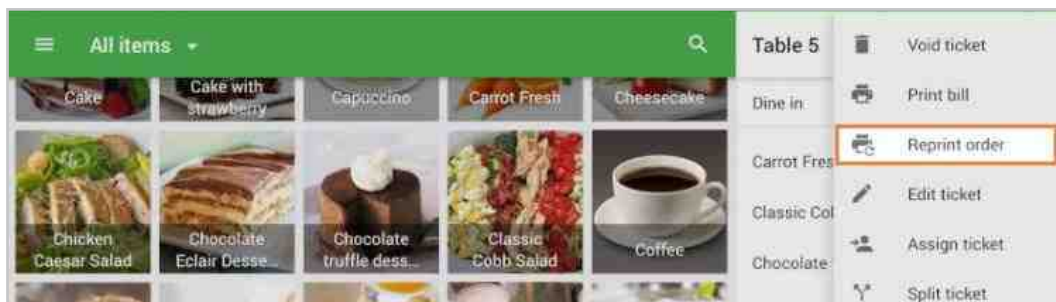
Now, when a customer orders, the kitchen printer automatically produces a ticket with the list of items to prepare. If you use open tickets, the kitchen ticket will print as soon as you save the open ticket.

4



If you correct an open ticket by deleting or adding an item, the kitchen printer will print a corresponding ticket.

5



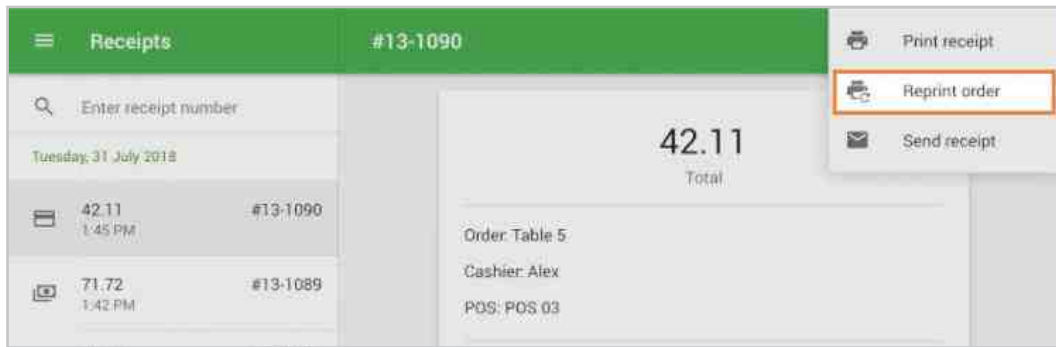
You can reprint the kitchen orders (for iOS only). To do this, open the saved ticket and tap 'Reprint order' from the three dots menu.

6



The kitchen printer will reprint the ticket with the mark 'Reprint'.

7

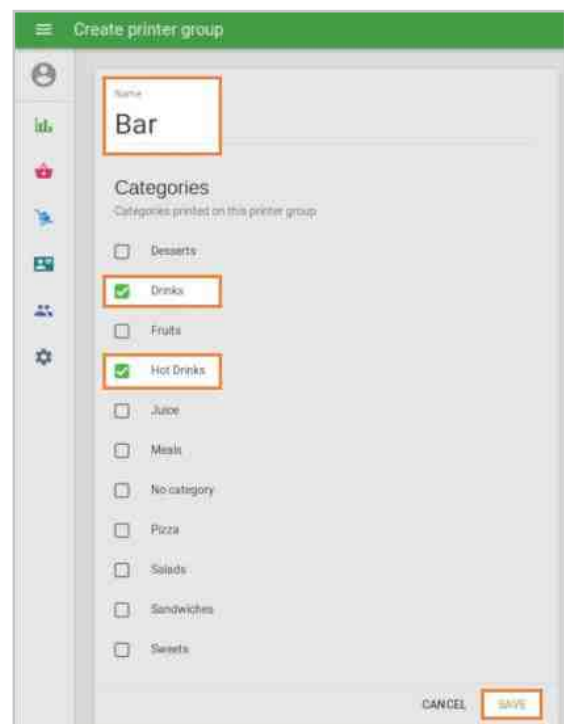
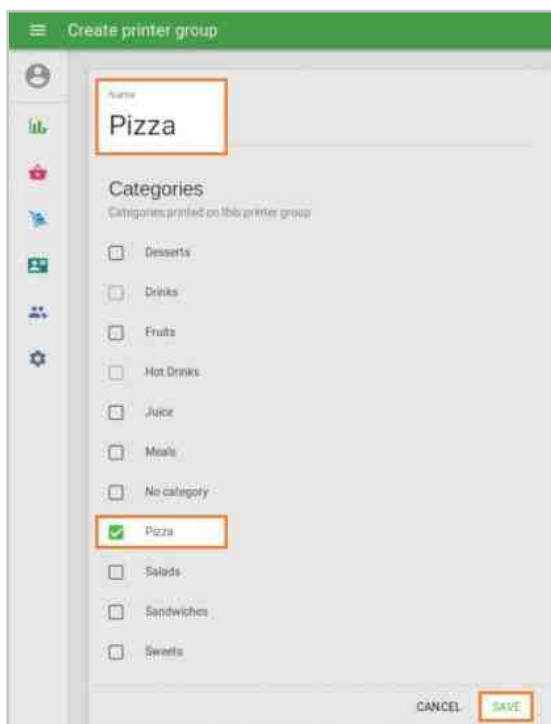


You can reprint the kitchen orders for 2 hours after closing the open ticket from the Receipts section.

9.10 How to Set Up Multiple Kitchen Stations to Share One Printer

Before Setting Up: The 'Kitchen Printers' option should be activated in your Back Office (see 9.9 Using kitchen printers with Loyverse POS), and printers should be set up in the Loyverse POS app (see 9.2 How to set up Ethernet printer in Loyverse POS).

1



If you want to print tickets from multiple kitchen stations with one printer, create a few printer groups and assign categories to them in the Back Office.

2

On the Loyverse POS app, assign each individual printer to both printer groups.

3

On the Loyverse POS app, assign each individual printer to both printer groups.

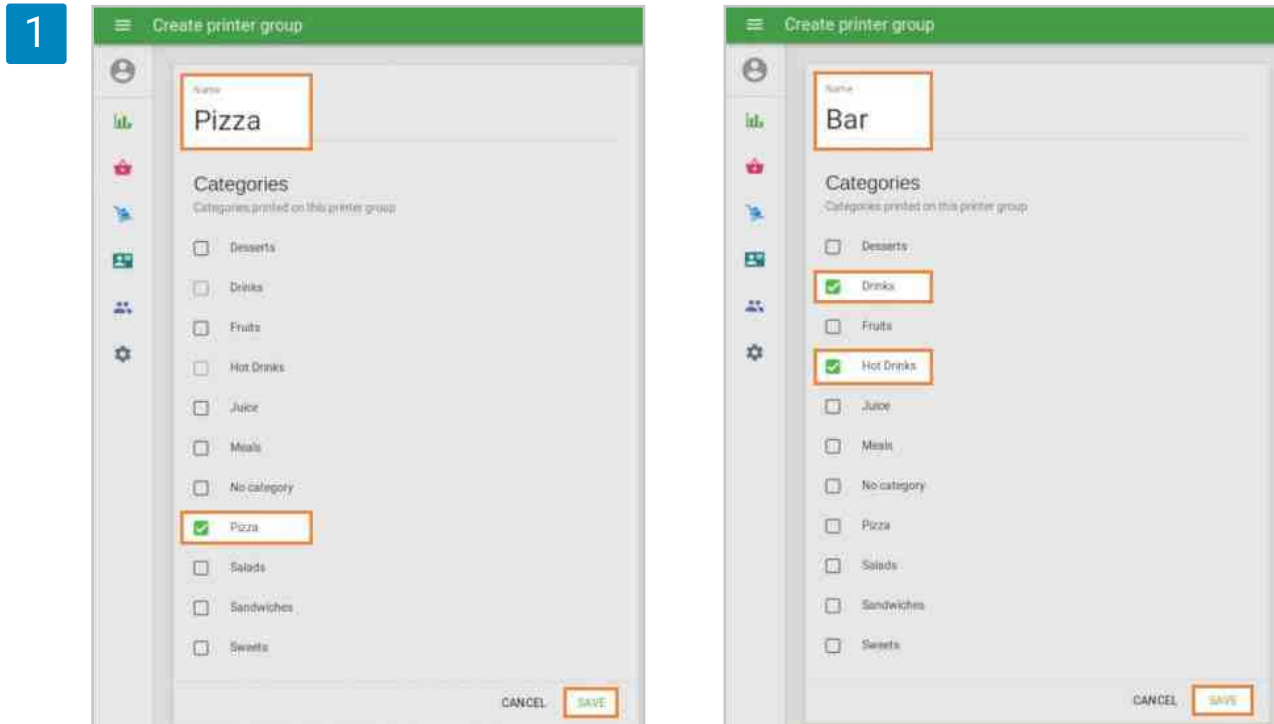
4



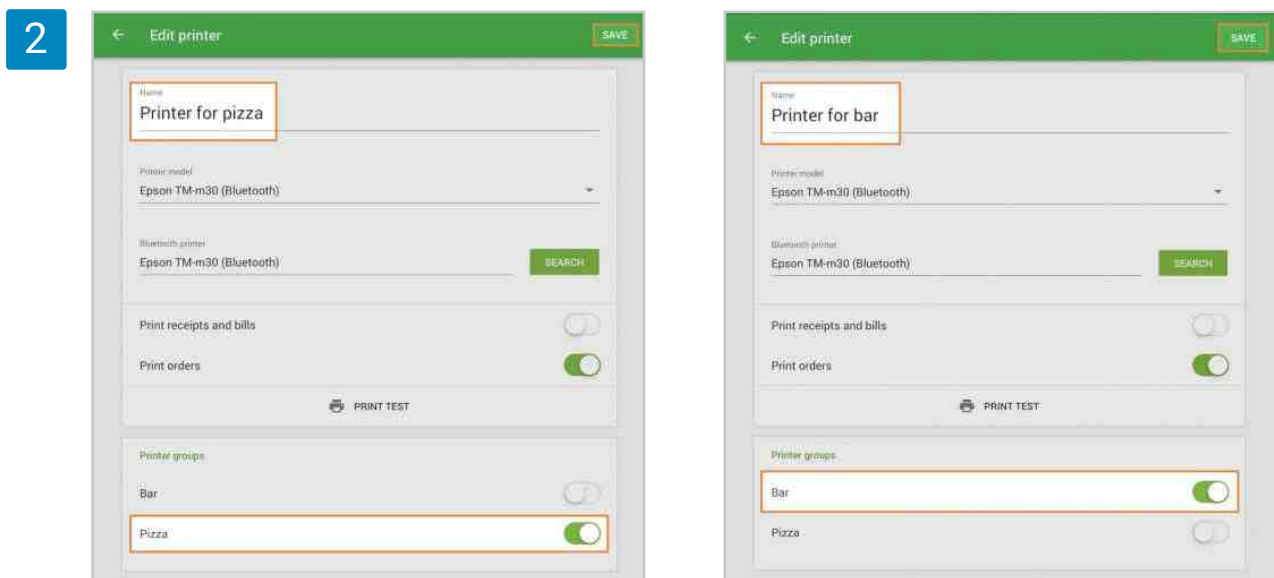
Type the title of your printer in the 'Name' field and select Sunmi from the drop-down menu of printers models.

9.11 How to Set Up Kitchen Printer for Each Kitchen Station

Before Setting Up: The 'Kitchen Printers' option should be activated in your Back Office (see 9.9 Using kitchen printers with Loyverse POS), and printers should be set up in the Loyverse POS app (see 9.2 How to set up Ethernet printer in Loyverse POS).



If you want to set up a separate kitchen printer for each kitchen station, create printer groups and assign categories to them in the Back Office.



On the Loyverse POS app, assign each printer to its own printer group.



Now, when a customer orders, two kitchen printers produce tickets with the list of items from their categories.

9.12 Supported Barcode Scanners

Loyverse POS for Android works with scanners supporting HID protocol. You can use scanners with Bluetooth interface or USB scanners via a USB OTG adapter/cable.

Loyverse POS on IOS devices supports only following scanner models:

- Socket Mobile 7Ci
- Socket Mobile 7Qi
- Socket Mobile S700
- Socket Mobile S740
- Socket Mobile S800.

9.13 How to Connect a USB Barcode Scanner to an Android Device

If your Android smartphone or tablet supports a USB on-the-go, or OTG, you can use a USB barcode scanner with the Loyverse POS app.

To use a USB scanner with Loyverse POS on an Android device, you will need a USB OTG adapter or cable. It has a female USB connector on one end and a male micro USB connector on the other.



First plug the USB barcode scanner to the female USB connector of an OTG adapter or a cable.



Then plug the the micro-USB end of the OTG adapter or cable into the micro-USB port of your mobile device and wait for the system to recognize the scanner.

Now you can add barcodes to your items and sell items with a barcode scanner.

9.14 How to Set Up Motorola CS3070 (Bluetooth) Barcode Scanner

- 1 Press the scan button (+) to wake the scanner.

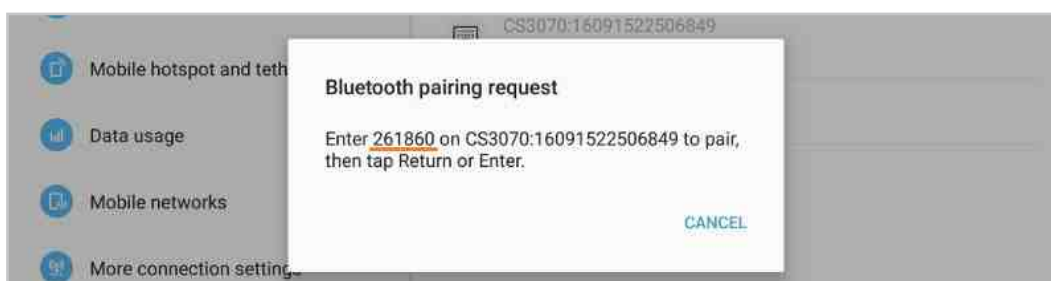
Press and hold the Bluetooth button (round button) for five seconds. The scanner beeps and the Bluetooth button starts blinking quickly to indicate that the scanner is discoverable by the host.

2



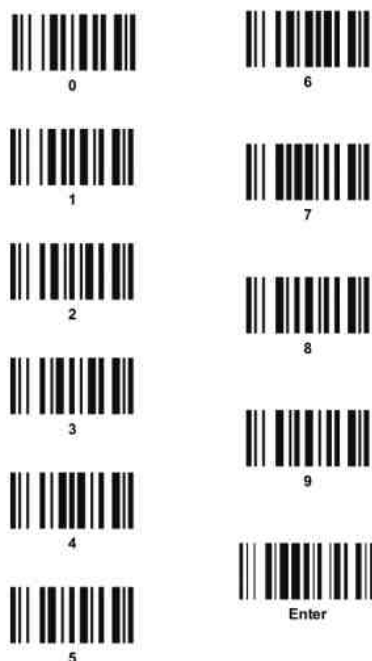
On your mobile device, turn on Bluetooth and let it search for devices. You will see your scanner in the list.

3



Select the CS3070 from the discovered device list. The Bluetooth application will prompt you to scan the pass key it generated.

4



Scan Numeric Barcodes corresponding to the pass key, one by one, then scan the Enter code.

5



The Bluetooth button blinks slowly to indicate that the scanner is paired with the host.

Now, in your Loyverse POS app, go to the 'Sales' menu. When you scan the item with a barcode, this item will be added to the ticket.

9.15 Socket 7Qi/7Ci (Bluetooth) Barcode Scanner Setup

9.15.1 Connecting Scanner to Android Device

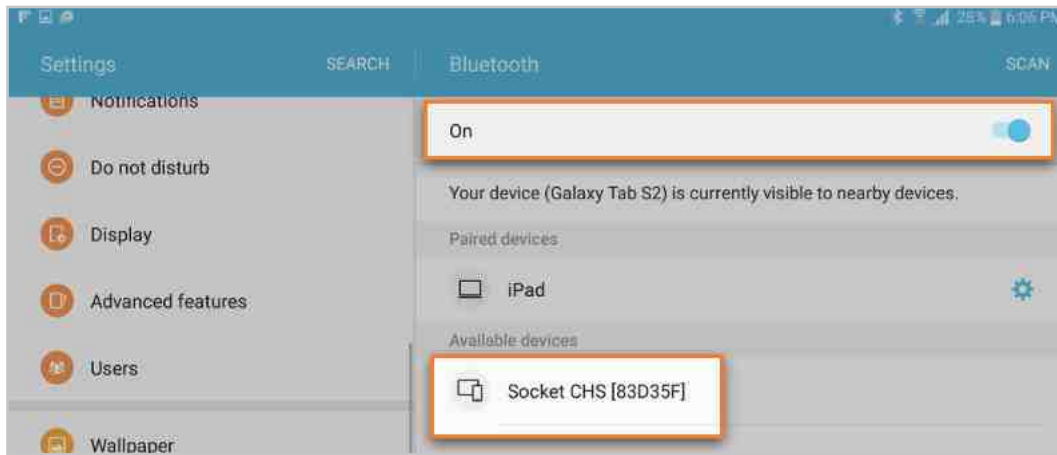
When working with the Loyverse POS app on your Android Mobile Device, the Socket 7Qi/7Ci (Bluetooth) scanner should be connected in the Human Interface Device (HID) Basic Mode.

1

Power on the scanner and configure it to the connection mode by scanning this barcode:



2



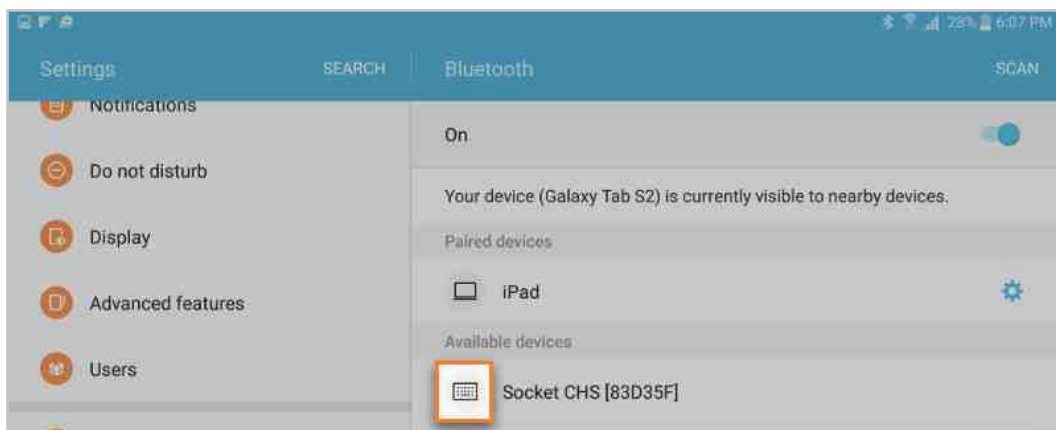
Turn Bluetooth on in your device. Go to Settings > Bluetooth. A Bluetooth Device search will begin. You will see your scanner in the list.

3

Configure the scanner to Human Interface Device (HID) Basic Mode, as Keyboard class device, by scanning this barcode:

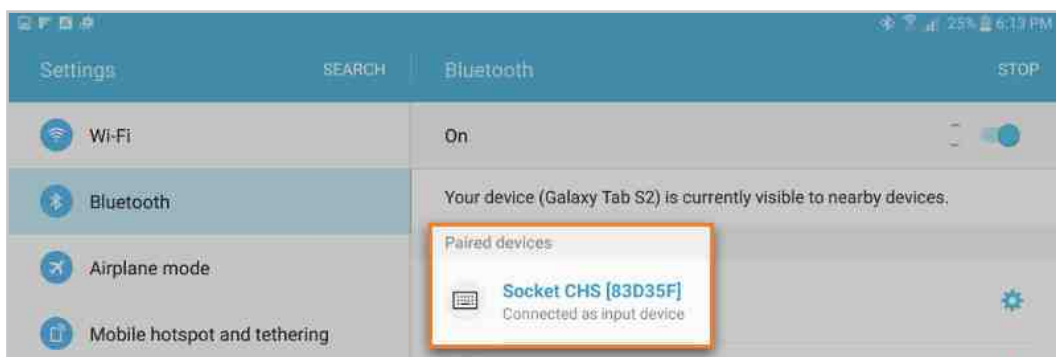


4



The scanner icon will be changed to the keyboard.

5



Tap on your Socket scanner in the list of Devices. After a few seconds, the “Not Paired” status will change to “Connected” or “Paired” and the scanner Blue LED will start blinking every 3 seconds, confirming the connection.

Now, in your Loyverse POS app, go to the ‘Sales’ menu. When you scan the item with a barcode, this item will be added to the ticket.

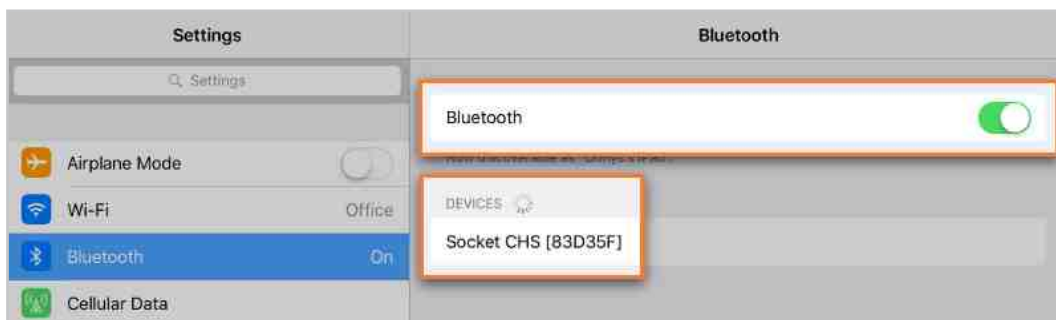
9.15.2 Connecting Scanner to Apple iOS Device

When working with the Loyverse POS app on the Apple iOS device Socket 7Qi/7Ci (Bluetooth) scanner should be connected in Application Mode.

- 1 Power on the scanner. To change the profile to Application Mode, scan this barcode:



2



Turn on Bluetooth on the Apple device. Go to Settings > Bluetooth. The bluetooth device search will begin.

3



Tap on your Socket scanner in the list of Devices found. After a few seconds the “Not Paired” status will change to “Connected” or “Paired” and the scanner’s blue LED will blink every 3 seconds, confirming the connection.

Now in you Loyverse POS app, go to the ‘Sales’ menu. When you scan the item with the barcode, this item will be added to the ticket.

9.16 Supported Cash Drawers

Loyverse POS can support printer-driven cash drawers, which means a cash drawer is connected to a printer, which in turn is connected to Loyverse POS. Therefore, you can use any cash drawer which can be driven by your receipt printer. Please consult cash drawer manual or manufacturer website to see if your cash drawer is compatible with your receipt printer.

Note

Receipt printer and cash drawer should have the same voltage of power supply 12 or 24 V. If they have different voltage they will not be compatible.

9.17 How to Connect a Cash Drawer

A cash drawer connects to your receipt printer, and is triggered to open automatically when you finish a cash sale.

Most of receipt printers have a special cash drawer connector, usually of RJ11 type. Refer to your receipt printer and cash drawer manuals to make sure they are compatible. As long as they are, and given the receipt printer is supported by Loyverse POS, such cash drawer can be used with Loyverse POS as well.

Before connecting a cash drawer, your printer should be paired with Loyverse POS using the Print Receipts and Bills option in your app settings.

1



Find the cash drawer socket on your receipt printer.

2



Plug the cash drawer cable into the socket.

3



Turn the printer on and ring up a cash sale using the Loyverse POS app (Play Market or App Store). The cash drawer will open when the sale is completed.

A cash drawer also opens when:

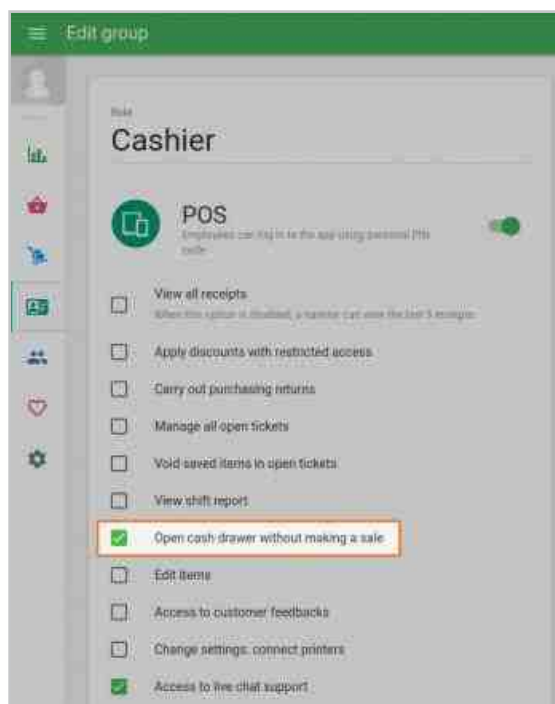
- A refund receipt is printed for cash refunds only
- Opening shifts for employees to enter the initial cash amount
- Closing shifts for employees to calculate the final cash amount
- 'Pay In' and 'Pay Out' actions performed to put money into or take from the cash drawer
- Using the 'Print test' option to test your printer's connection with the Loyverse POS app.

Note

Cash drawers APG: Vasario 1416 and Vasario 1616 should be connected with receipt printer only through the cable CD 102 A.

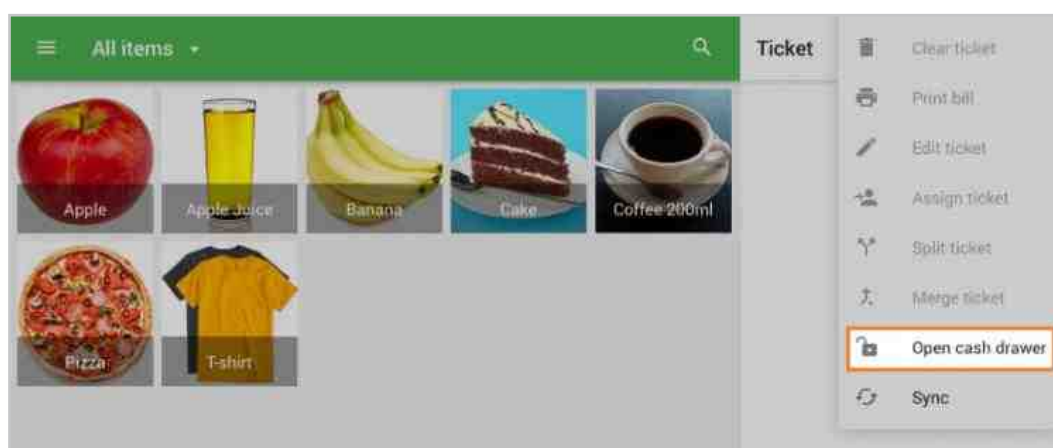
9.17.1 How to Open Cash Drawer without Making a Sale

1



You can set the right to open cash drawer without making a sale for your employee group. Go to 'Access rights' menu at the 'Employee' section in the Back Office and open the group for the editing. Check the box 'Open cash drawer without making a sale' in the 'POS' section.

2



You can find the 'Open cash drawer' button in the three vertical dots () menu at the Sale screen of your POS.

Note

The button 'Open cash drawer' is displayed only if there is at least one printer connected with the option 'Print receipts and bills'.

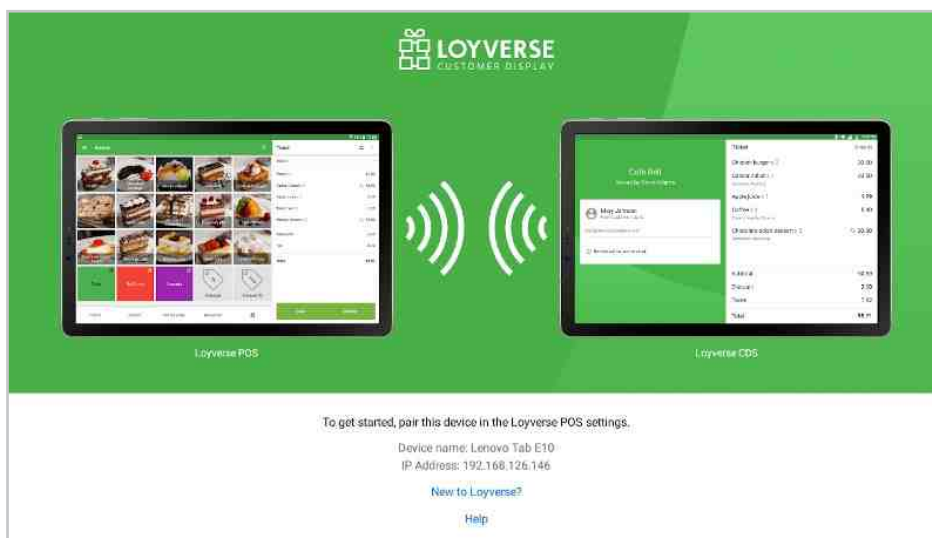
9.18 Customer Display System Configuration Guide

The Loyverse CDS app lets you display itemized order information to your customers on a separate digital display without interrupting the payment flow in the Loyverse POS app.

9.18.1 Install Loyverse CDS App

- 1 Download the Loyverse CDS for iPad (iOS 8.2 or higher) or Android (4.0.3 or later) tablet. Loyverse CDS app only works on tablets. The tablet should be positioned in a landscape orientation. Loyverse CDS app should be installed on a separate device from the one with the Loyverse POS app.

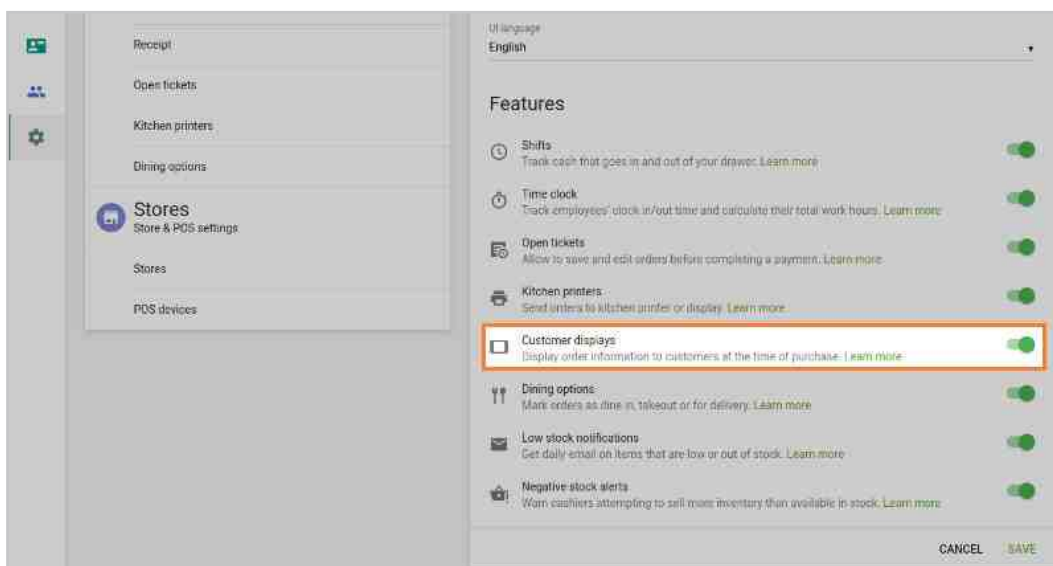
2



Launch the app, and you will see the Loyverse CDS welcome screen. The 'IP Address' and 'Device name' of your tablet will be displayed, which are information needed for pairing CDS with Loyverse POS.

9.18.2 Activate Option for Using CDS

1

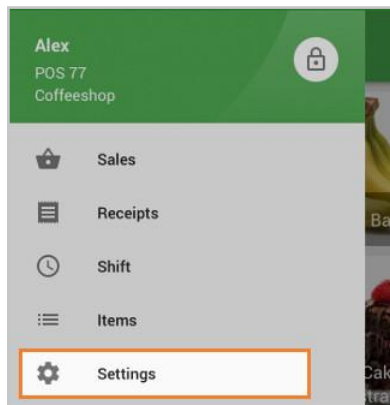


Login to the Back Office, navigate to the Settings menu, scroll to General Settings and switch the 'Customer displays' slider on.

9.18.3 Pair Customer Display with Loyverse POS

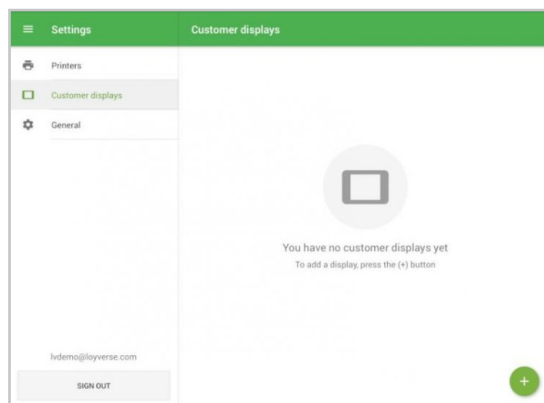
1 First, make sure that the mobile devices with Loyverse CDS and Loyverse POS are connected to the same Wi-Fi router and the same network.

2



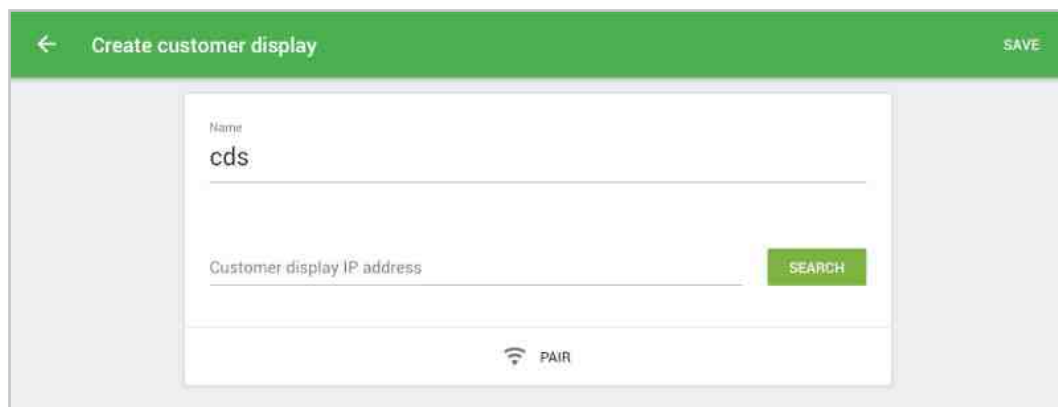
Then launch Loyverse POS and go to Settings > Customer displays.

3



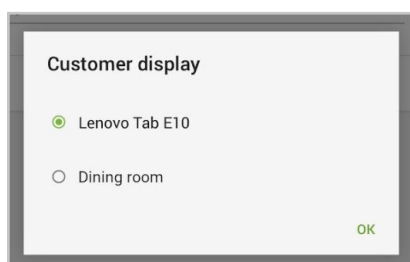
Tap the '+' button to add a customer display.

4



Enter your customer display name into the 'Name' field and tap the 'Search' button to search the network for available customer display device.

5

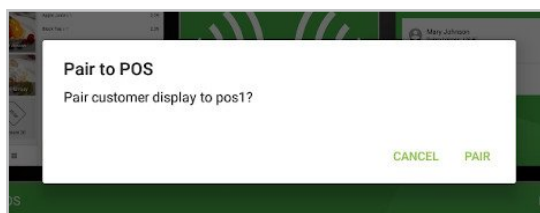


Select the appropriate customer display from the list of discovered devices, and click OK.

6

If automatic discovery fails, you can enter the IP address of the customer display device manually. You can take the information about the IP address from the Loyverse CDS welcome screen. Then tap the 'Pair' button.

7



On the Loyverse CDS tablet, the invitation to pair CDS to POS will appear. Tap 'Pair' to confirm the connection.

8

If you see a screen with a blank ticket, then your customer display is paired with Loyverse POS.

9

Enter your customer display name into the 'Name' field and tap the 'Search' button to search the network for available customer display device.

10



Now you can see your paired Customer Display on the list.

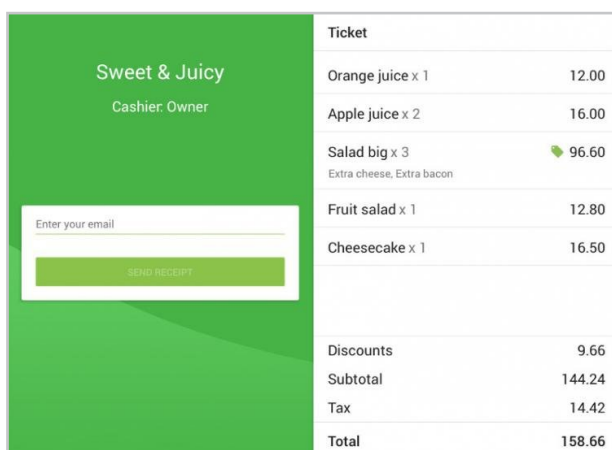
In the same way, you can connect several CDS to the same POS.

9.19 How Loyverse CDS Customer Display Works

Please refer to the Loyverse CDS setup guide and make sure you Loyverse CDS app is configured correctly.

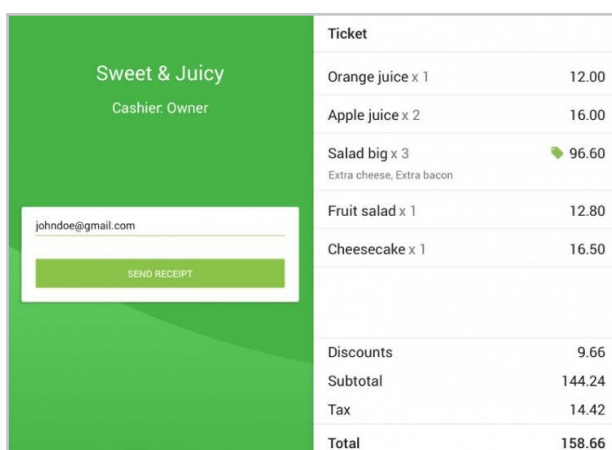
Now that you have Loyverse CDS setup, it will display order information from the ticket during sales.

1




At the right side of the screen, there is the ticket with the list of items. CDS will display modifiers, discounts, taxes applied to items as well as to full ticket.

2




At the left side of the screen the store and cashier names displayed and field that customer can fill in E-mail to receive e-receipt.

3

Sweet & Juicy Cashier: Owner	
<div>  Jane Points balance: 120.03 janeemail@gmail.com Receipt will be sent to email </div>	
Ticket	
Orange juice x 1	12.00
Apple juice x 2	16.00
Salad big x 3	96.60
Extra cheese, Extra bacon	
Fruit salad x 1	12.80
Cheesecake x 1	16.50
Discounts	9.66
Subtotal	144.24
Tax	14.42
Total	158.66



If you have assigned a customer to a ticket, the CDS displays this customer name, bonus points balance and Email.

4

Sweet & Juicy Cashier: Owner	
<div>  Jane Points balance: 120.03 janeemail@gmail.com Receipt will be sent to email </div>	
Ticket	
Apple juice x 2	16.00
Salad big x 3	96.60
Extra cheese, Extra bacon	
Fruit salad x 1	12.80
Cheesecake x 1	16.50
Coffee x 1	100.00
Sandwich x 1	15.00
Black tea x 1	8.60
Salad x 1	6.00
Subtotal	283.50
Tax	28.35
Total	311.85

If the ticket is too long, a customer can use a vertical scroll to look through all items.

5

Sweet & Juicy Cashier: Owner	
<div>  Jane Points balance: 120.03 janeemail@gmail.com Receipt will be sent to email </div>	
<div>  Transaction successful </div>	
311.85	8.15
Total paid	Change
Points earned: 31.19	

After a customer has been charged, customer screen displays total value of payment and change.

9.20 Kitchen Display System Configuration Guide

This guide will show you how to configure Loyverse KDS.

Cafes and restaurants use kitchen display systems (KDS) instead of kitchen printers to inform the cooking staff what to prepare from an order.

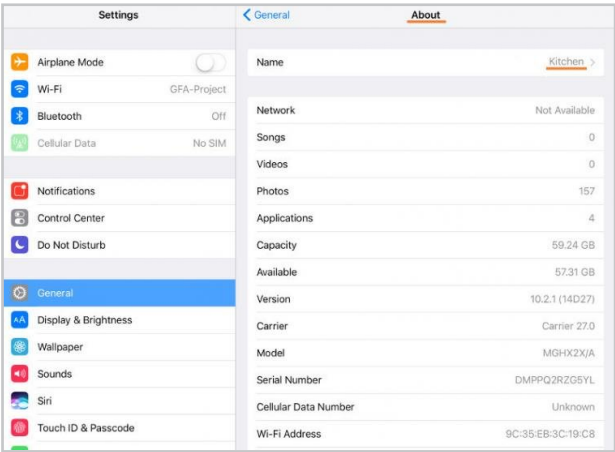
- 1

Install Loyverse KDS app

Download the Loyverse KDS for iPad (iOS 8.2 or higher) or Android (4.3 or higher) tablet. Although the minimum requirement is 7" display, it is recommended to use at least a 10" tablet for better visibility. The tablet should be positioned in landscape mode.
- 2

Specify a device name

Your Loyverse KDS app will inherit the device name. The default device name is not very informative, thus it is recommended (but not mandatory) to give your device a name reflecting its location – kitchen, bar, etc.

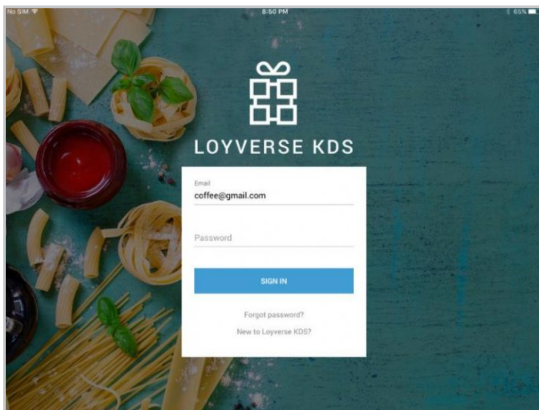


To configure the device name on an iPad, go to Settings > General > About. Tap the first line, which shows the name of your device. Rename your device, then tap Done.

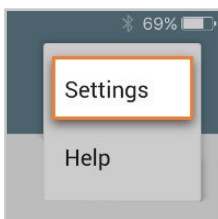


To configure a device name on an Android tablet, go to Settings > About device. On the next screen, tap Device Name, rename your device and tap OK.

3

Configure Loyverse KDS app

Launch the app and log in with the same login and password as you use for Loyverse



Go to the menu at the right top corner (three dots) and tap Settings.



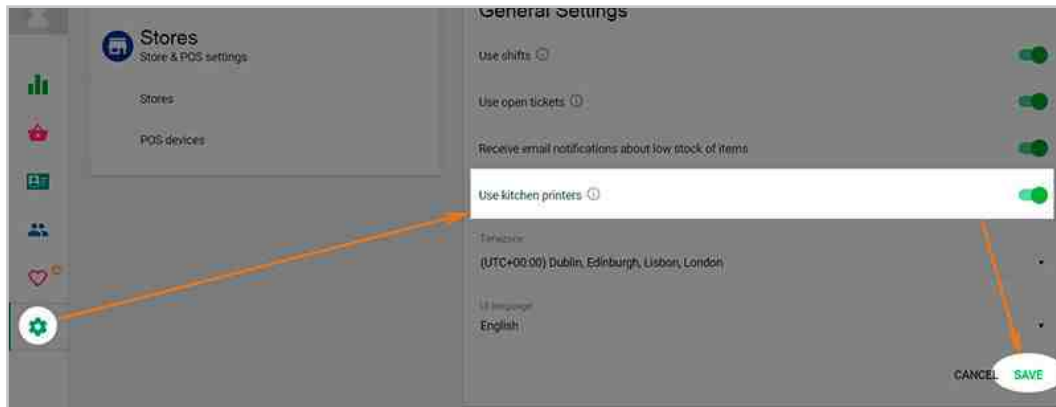
To use sound notifications, turn the 'Order notification sound' option on and choose a sound from your device. The sound will be played each time a new order appears.

You will also want to adjust the time intervals after which the ticket headers will change its color to warning (yellow) and late (red). Default values are 4 minutes (240 seconds) and 7 minutes (420 seconds).

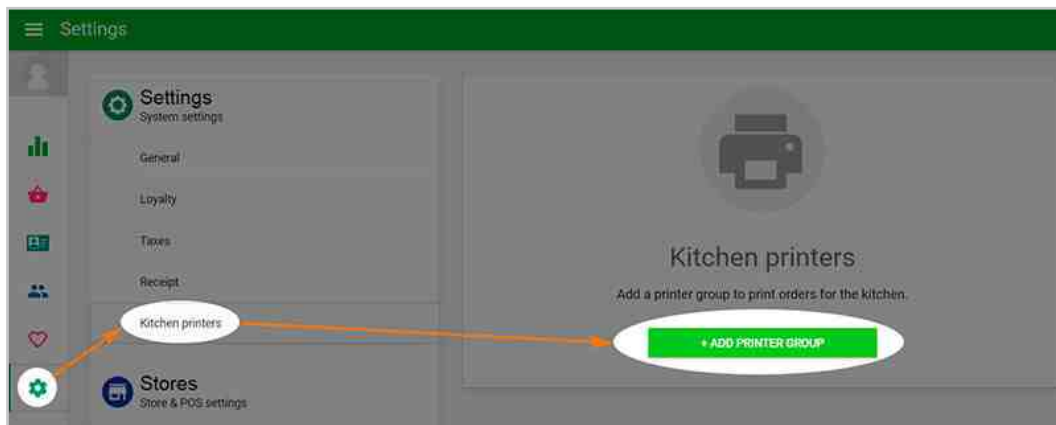
4

Create a printer group

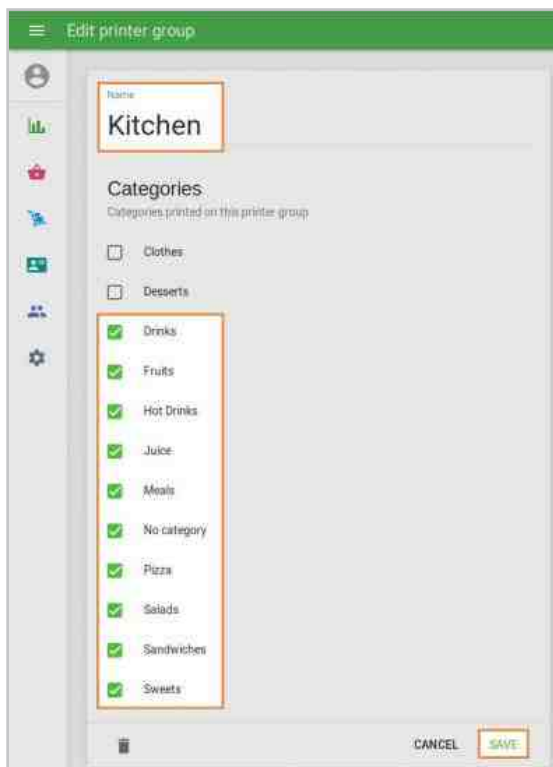
Loyverse POS treats kitchen display as a kitchen printer, therefore the Back Office configuration for a kitchen display is the same as for kitchen printers.



Log in to the Back Office, navigate to the Settings menu, scroll to General Settings and switch on the Use Kitchen Printers slider.



Click the Kitchen Printers menu and create a printer group.

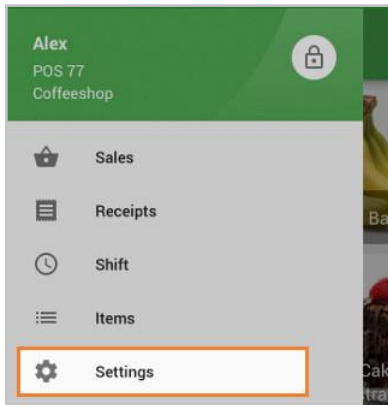


Give the printer group a name. Tick item categories that should be included in this printer group and save your selection.

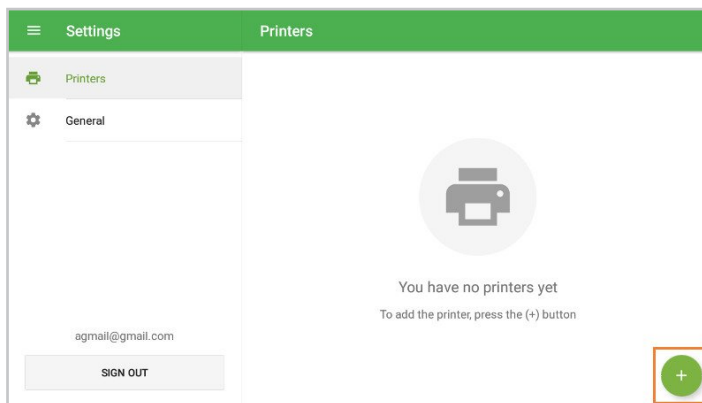
5

Pair kitchen display with Loyverse POS

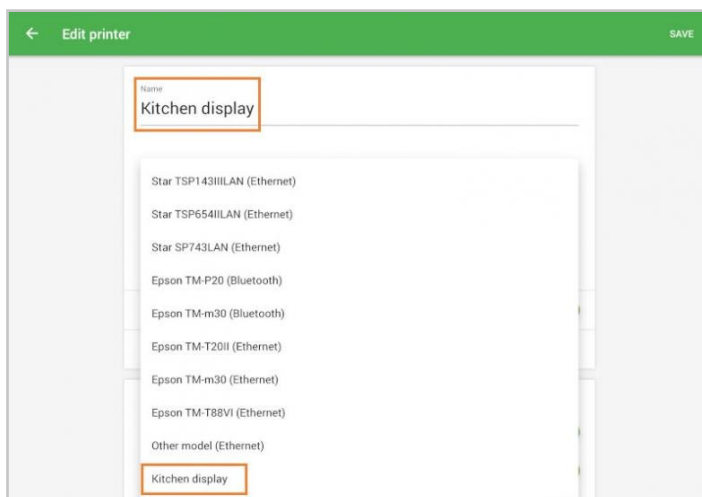
First, make sure that all mobile devices with Loyverse KDS and Loyverse POS are connected to the same Wi-Fi router.



Then launch Loyverse POS and go to Settings > Printers.



Tap the '+' button to add a kitchen display as a printer.



Enter your kitchen display name into the 'Printer name' field and select Kitchen Display from the drop-down menu.



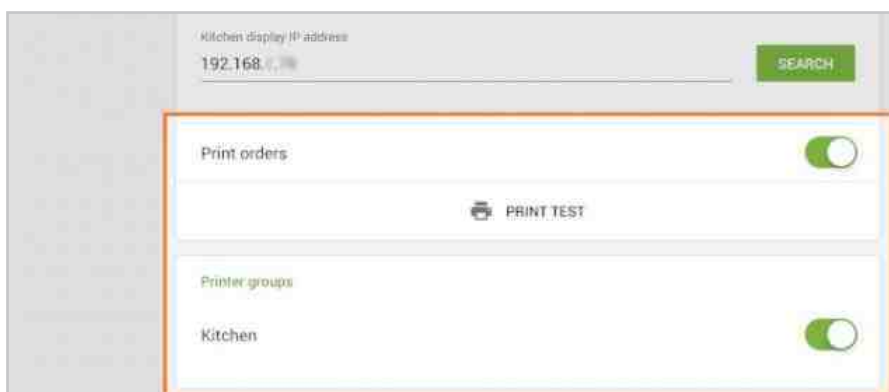
Tap the 'Search' button to search the network for available kitchen display devices.



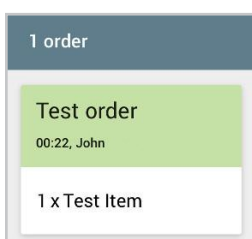
Select the appropriate kitchen display from the list of discovered devices and click OK.



If automatic discovery fails, you can manually enter the IP address of the kitchen display device.



Then switch 'Print orders' on, select a printer group and tap the 'Print test' button.



If you see a test order appear on the kitchen display, you have configured Loyverse KDS correctly. Save your settings and enjoy!

If no test order appears, re-check the device network settings or chat with our support team.

9.21 How to Use Loyverse KDS Kitchen Display

Please refer to the Loyverse KDS setup guide and make sure you Loyverse KDS app is configured properly and test orders appear on kitchen display.

Now that you have Loyverse KDS set up, customer orders will appear on your kitchen display(s) as tickets with the list of items to prepare.

The first line of a ticket header contains either ticket number or ticket name for saved open tickets. Then there is time since the order was created and server's name.



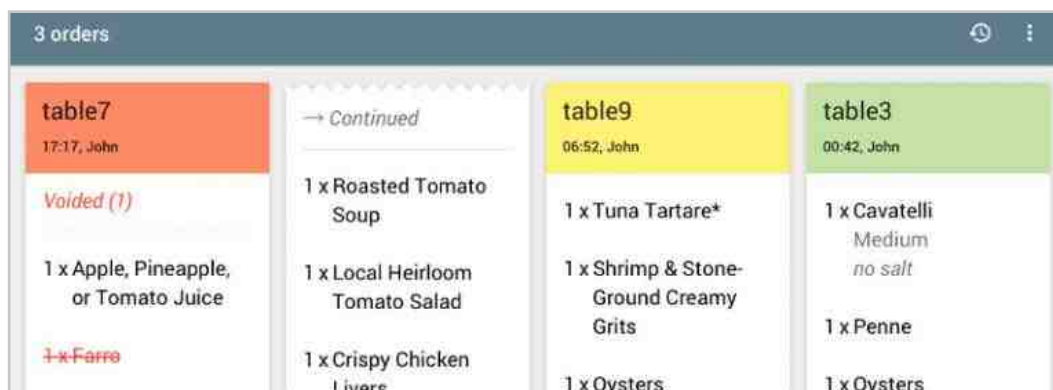
If there are item modifiers and/or comments, they will be listed just under the item name. The ticket comment is shown in the footer.

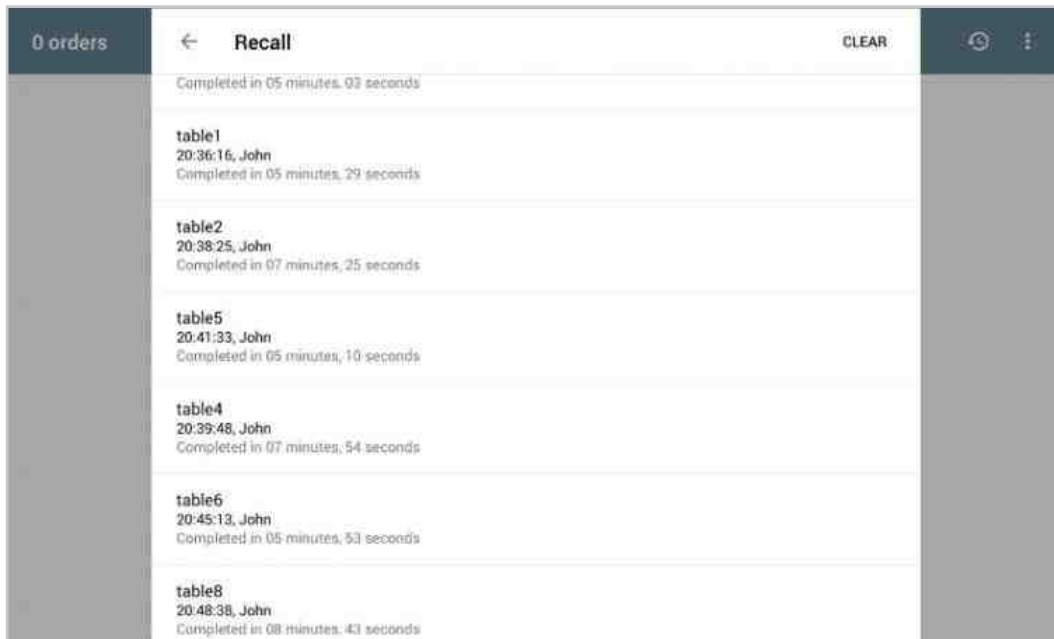
Long tickets break down to several pieces so you can still see the entire ticket on one screen without scrolling.

As time passes, ticket header color will change from green to yellow to red, indicating orders that are almost or already late. The time period can be adjusted in Settings.

If you edit an open ticket and void an item, KDS will display the voided item in the ticket in red strikethrough font.

If you edit an open ticket, adding an item, it will be shown as a new ticket.





Tap on the ticket header to mark it complete when all the items are done.

To recall a closed ticket tap on the clock icon and tap the ticket you wish to recall.

To clear the entire list of completed tickets, tap 'Clear'.

9.22 Troubleshooting when Working with KDS

9.22.1 Separate Router

Often problems of losing the connection between Loyverse POS and KDS appear when there are many other Wi-Fi connections to the same Wi-Fi router.

Note

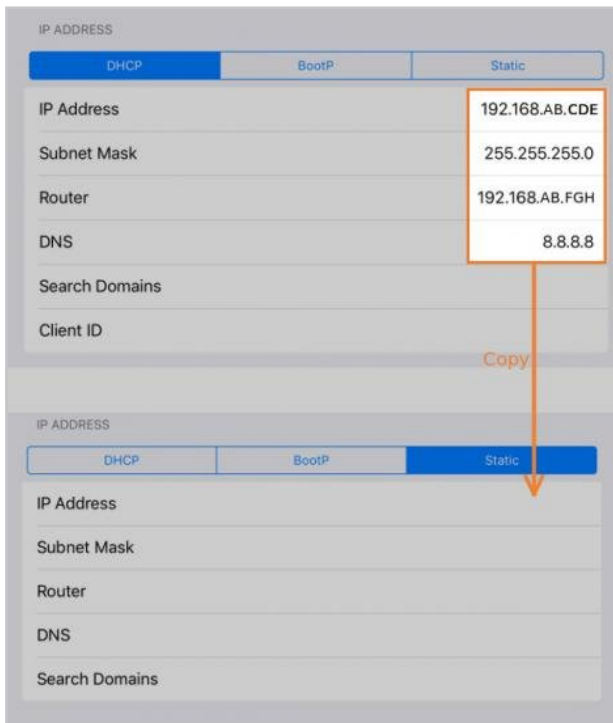
We recommend having separate router with Wi-Fi connection only to the mobile device with Loyverse POS App and mobile devices with KDS App.

If the problem continues or you cannot have separate router go to next step.

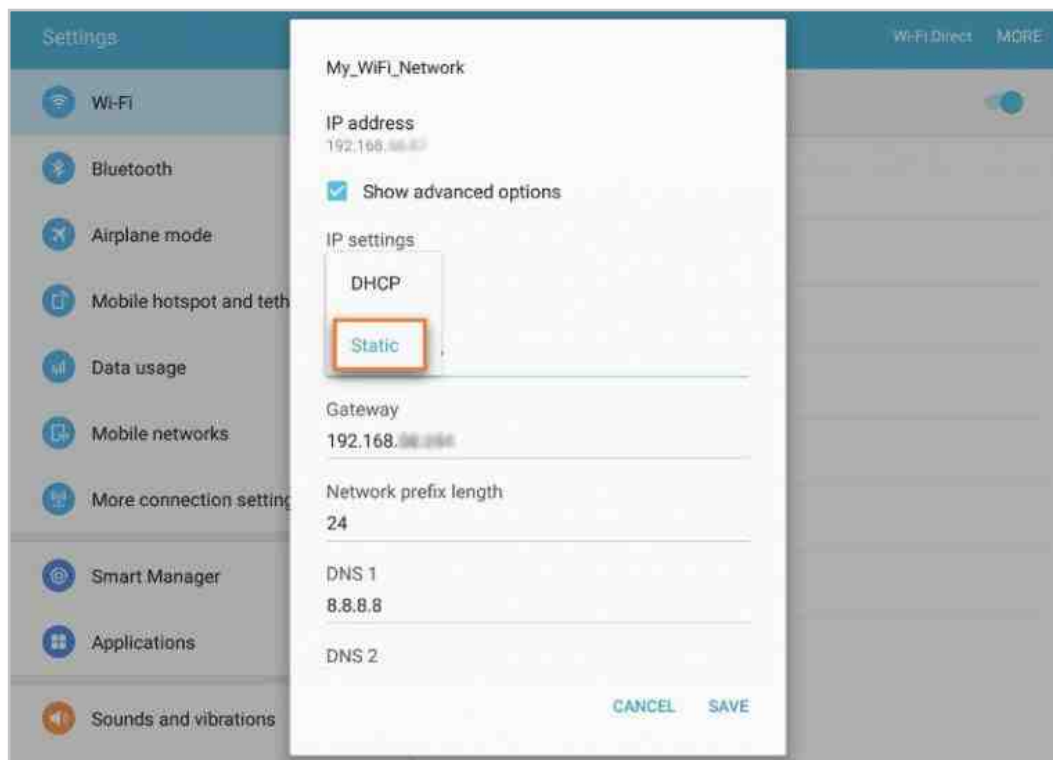
9.22.2 Assign a Static IP Address to the Kitchen Display Tablet

Connect your device to the same WiFi network as the device with Loyverse POS is connected to, and make sure the connection is working. Then change your network settings from DHCP to static.

On an iPad, go to Settings > WiFi. Tap on the blue arrow next to the name of the active Wi-Fi network. Write down the IP address, Subnet mask, Router and DNS values you see on the 'DHCP' tab, switch to the 'Static' tab and enter those values into respective fields. Tap on the Wi-Fi networks button in the upper left corner of the screen to save settings.



On an Android tablet, go to Settings > WiFi, tap and hold the active network, then tap 'Manage network settings'. Tap 'Show advanced options' and scroll down to IP settings, then change 'DHCP' to 'Static'. Tap 'Save'.



10. Payments



10.1 How to Work with Credit Card Payments

You can use any credit card processing system with Loyverse POS (Android, iOS), without integration between them.

Loyverse POS can register payments made through a card processing system that is installed and operated separately.

1

Ticket	
Dine in	
Carrot Fresh x 1	4.99
Cookies x 1	5.69
Fruit Salad x 1	8.49
Tax	1.68
Total	20.85

20.85
Total amount due

Cash received
20.85

CHARGE

25.00 30.00 40.00 50.00

CARD

On the final stage of the sale transaction, Loyverse POS gives you a choice between credit card or cash. But it does not connect to the credit card terminal itself and does not transfer the amount of purchase to the terminal. Therefore, at the card terminal, you need to enter the amount of sale manually and process the payment. Next, charge it to Loyverse POS by tapping the 'Card' button.

2

The Coffee
21 Avenue, Brooklyn, New York, NY, United States
Order: #0303-01-05
Cashier: Alex
POS: POS 1

Carrot Fresh	4.99
1 x 4.99	
Cookies	5.69
1 x 5.69	
Fruit Salad	8.49
1 x 8.49	
Subtotal	19.17
Sales Tax 8.75%	1.68
Total	20.85
Card	20.85

3.03.2017 13:35 #2078

The information about payment and card type will be shown on the receipt.

Sales by payment type

Today Yesterday This Week This Month 25 Feb - 03 Mar 17

All employees Export

Payment transactions	Payments amount	Refund transactions	Refunds amount	Net amount
4	167.25	0	0.00	167.25
4	73.49	0	0.00	73.49

Sales by payment type

Today Yesterday This Week This Month 25 Feb - 03 Mar 17

All stores All employees Export

Payment type	Payment transactions	Payments amount	Refund transactions	Refunds amount	Net amount
Cash	4	167.25	0	0.00	167.25
Card	4	73.49	0	0.00	73.49
Total	8	240.74	0	0.00	240.74

In the back office in the 'Sales by Payment Type' menu, you can find the report about credit card sales.

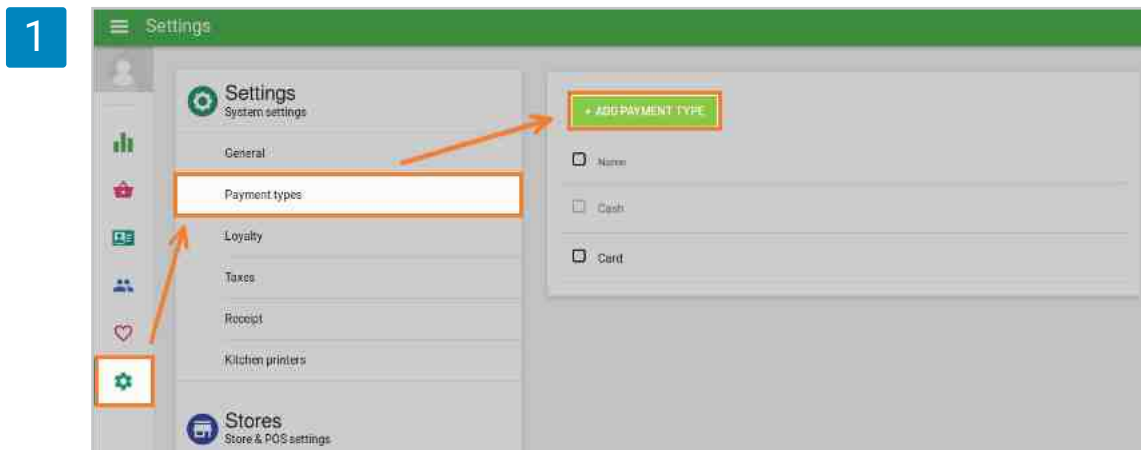
10.2 How to Accept Credit Cards with Loyverse POS and SumUp

Loyverse POS merchants can accept credit card payments via SumUp and available to customers in 31 countries: Austria, Belgium, Brazil, Bulgaria, Chile, Cyprus, Czech Republic, Denmark, Estonia, Finland, France (including Reunion and Mayotte), Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, Switzerland, The Netherlands, United Kingdom, United States.

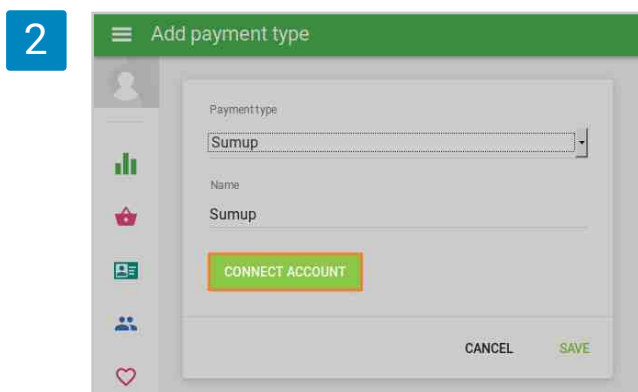
Before connecting a card reader, you have to create an account in SumUp and receive the device.

10.2.1 Connecting the Card Reader

Creating a payment type

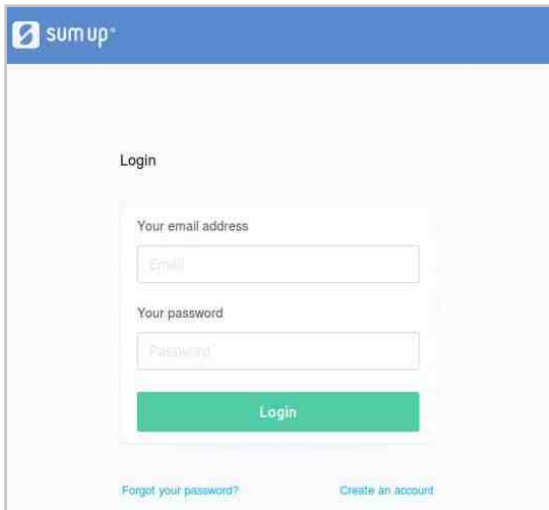


Log in to the back office, click the 'Settings' menu and then 'Payment types.' Click the 'Add payment type' button to add a new type of payment.



In the Add Payment Type window, select a 'SumUp' payment type from the drop-down list and tap 'Connect account' button.

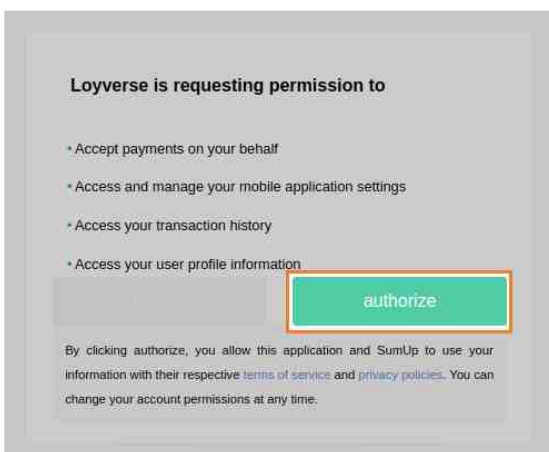
3



The image shows the SumUp login interface. At the top is the SumUp logo. Below it is the heading "Login". There are two input fields: "Your email address" with a placeholder "Email" and "Your password" with a placeholder "Password". Below these fields is a green "Login" button. At the bottom, there are two links: "Forgot your password?" and "Create an account".

Enter Email and Password from your SumUp account.

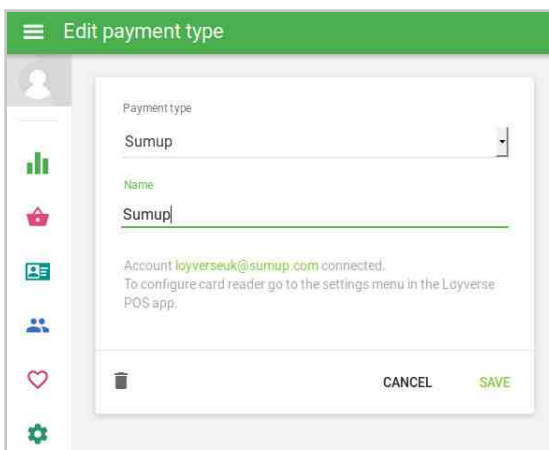
4



The image shows a screen titled "Loyverse is requesting permission to". It lists four permissions: "Accept payments on your behalf", "Access and manage your mobile application settings", "Access your transaction history", and "Access your user profile information". Below the list is a green "authorize" button. At the bottom, there is a paragraph of text: "By clicking authorize, you allow this application and SumUp to use your information with their respective [terms of service](#) and [privacy policies](#). You can change your account permissions at any time."

Enter Email and Password from your SumUp account.

5

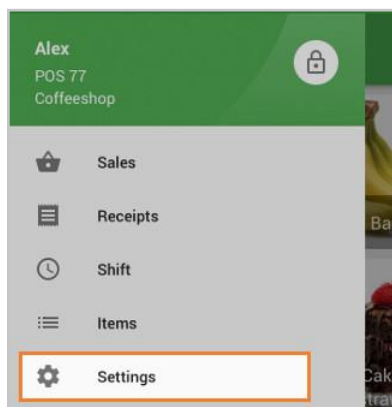


The image shows the "Edit payment type" screen in the Loyverse POS app. The title bar is green and says "Edit payment type". On the left is a sidebar with icons for various functions. The main content area shows a "Payment type" dropdown menu with "Sumup" selected. Below it is a "Name" field with "Sumup" entered. A message states: "Account [loyverseuk@sumup.com](#) connected. To configure card reader go to the settings menu in the Loyverse POS app." At the bottom are "CANCEL" and "SAVE" buttons.

You will see the connected account message, click 'Save' button.

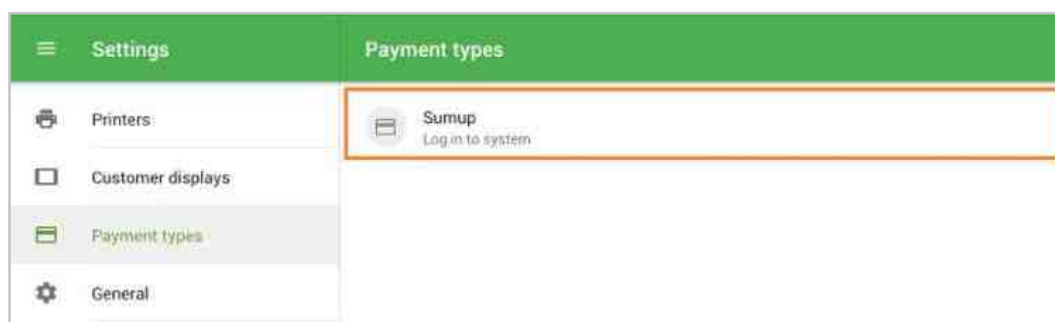
Connecting with iOS devices

1



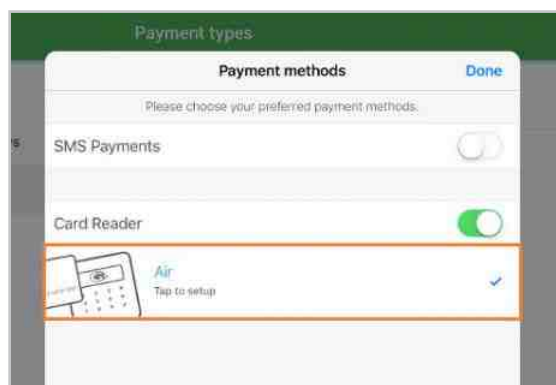
Then launch Loyverse POS and go to Settings > Payment Types.

2



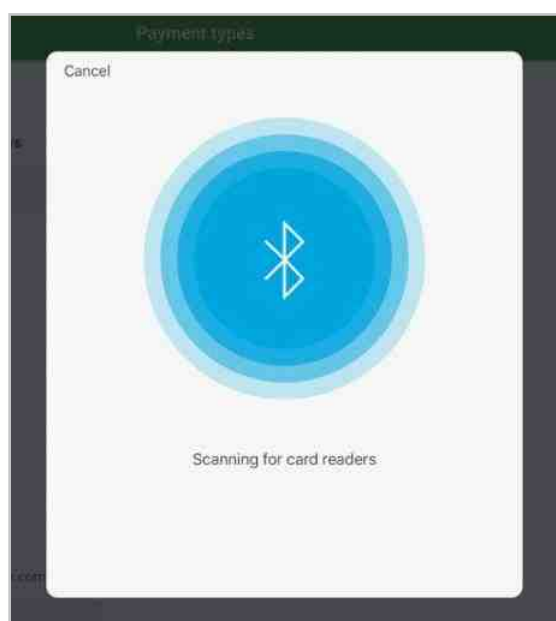
Tap the 'Sumup' button for account settings.

3



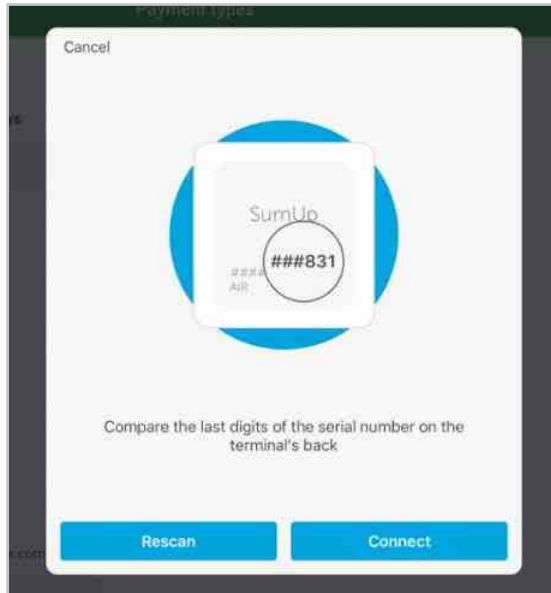
In the 'Payment methods' screen tap 'Air' button for set up.

4



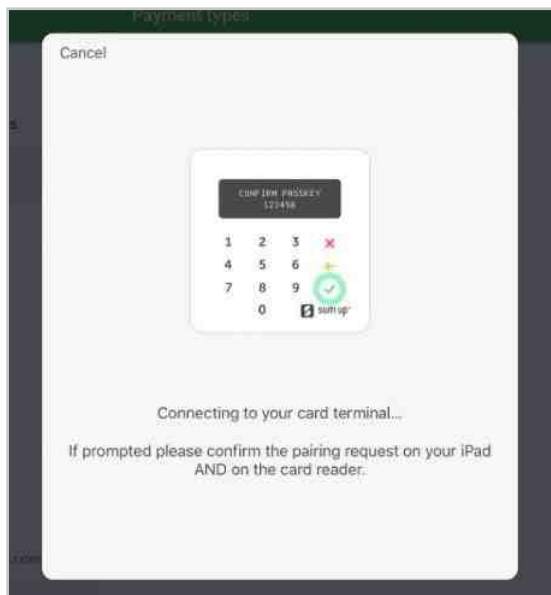
The application will start searching for SumUp card readers.

5



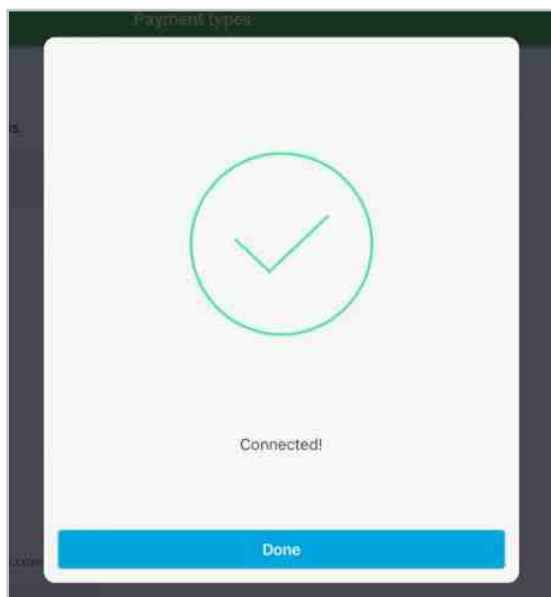
The application will show the last three digits of the found device. Tap 'Connect' button.

6



The application will ask you to confirm the pairing request on your card reader by pressing 'OK' button.

7

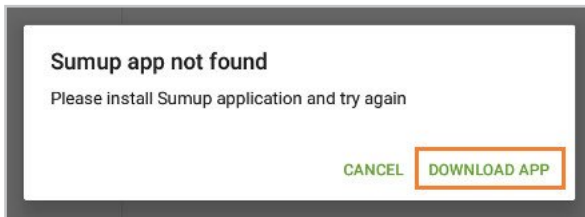


After you complete request, you will see information that card reader is connected. Tap 'Done' button.

Connecting with Android devices

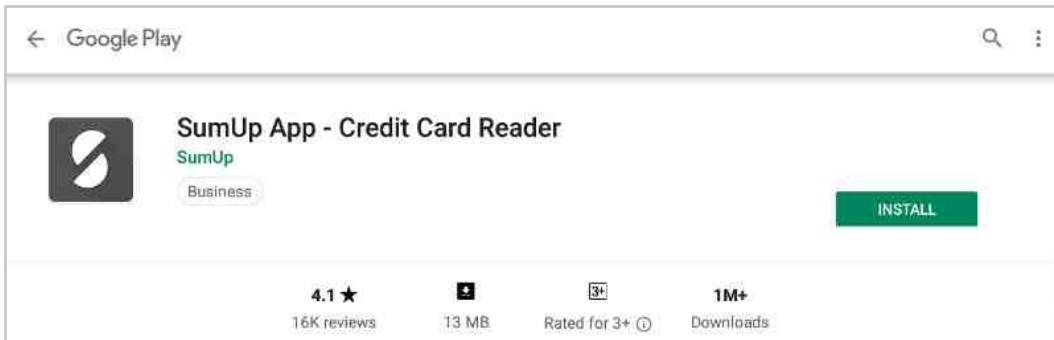
To connect SumUp card reader to Android devices make a test sales and select SumUp payment type.

1



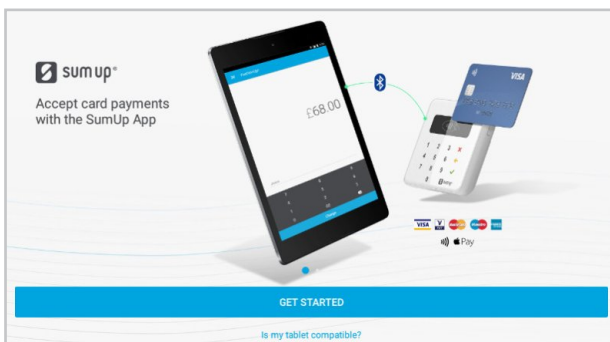
You will see an invitation to download the Sumup app. Tap 'Download app' button.

2



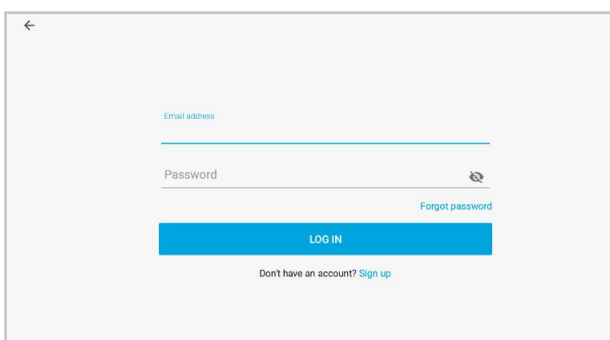
You will be redirected to Google Play to SumUp app. Install the app to your device and launch it.

3



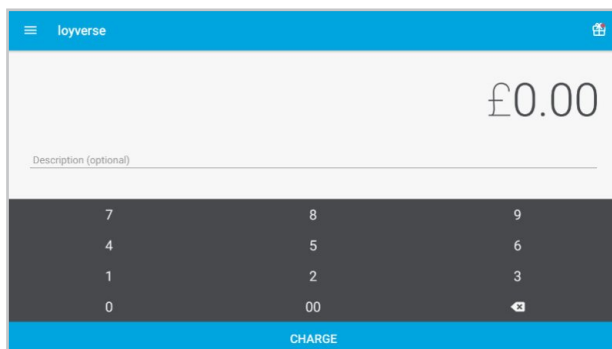
You will see the welcoming screen of SumUp app. Tap the 'Get Started' button.

4



Enter Email and Password from your SumUp account.

5



You will see an invitation to make payment through SumUp app.
Now you can close this app and go to accept payments through Loyverse POS.

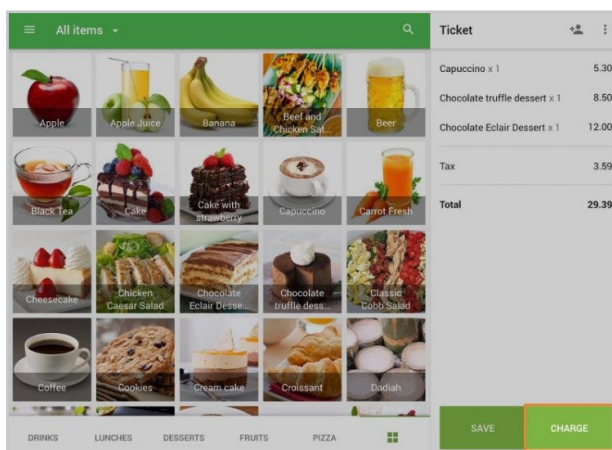
Note

SumUp works only with mobile devices which turned on geolocation.

10.2.2 Processing Payments

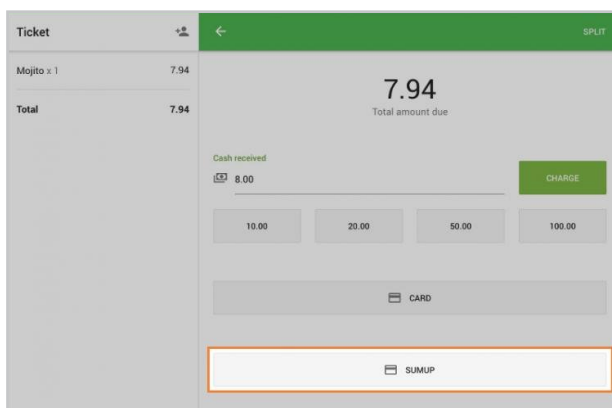
Payment

1



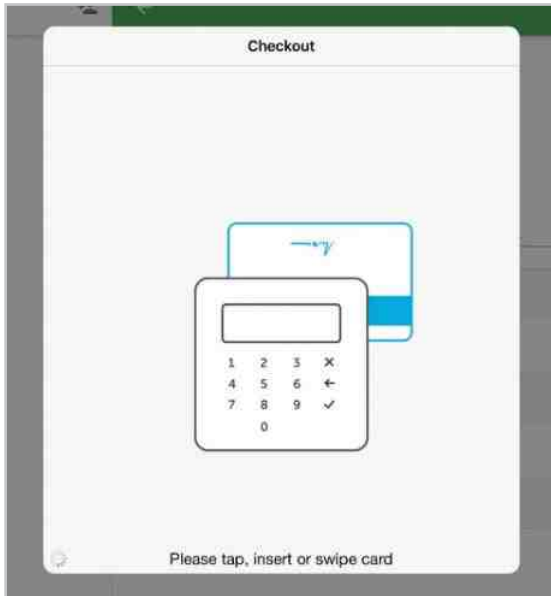
Add items to the ticket and press 'Charge.'

2



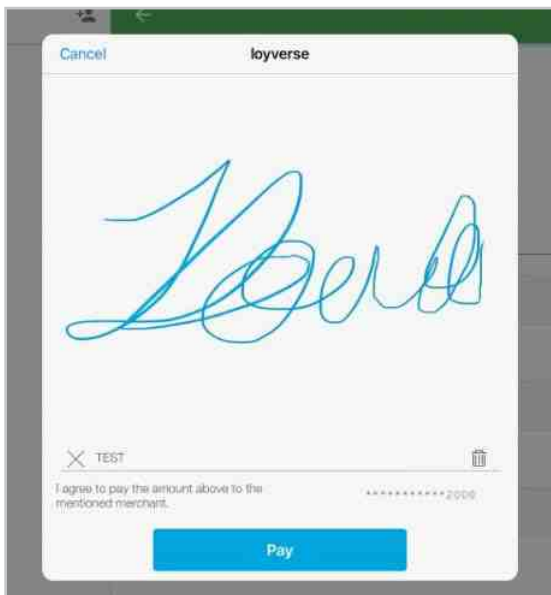
Select the SumUp payment type.

3



Loyverse POS will wait for a response from the card reader, and you will see an invitation to tap, insert or swipe card on the card reader.

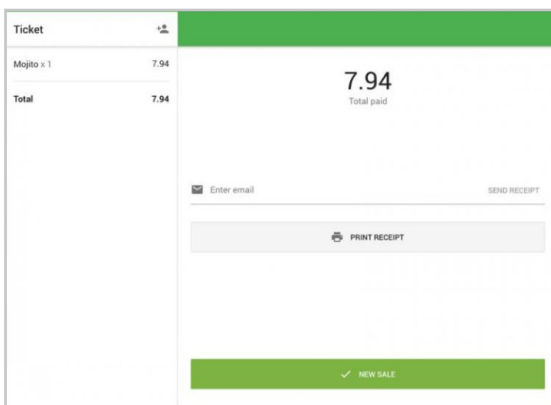
4



Tap, insert or swipe customer card on the card reader. If the card needs the pin entry, give card reader to a customer to do that. If a card needs a signature, let customer sign on the iPad's screen.

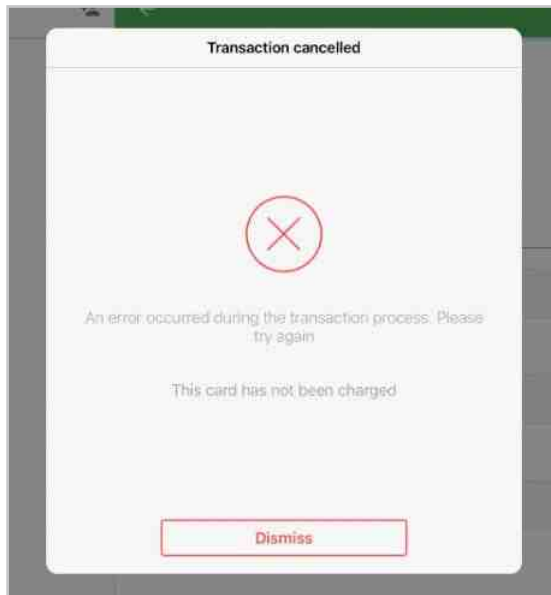
Tap 'Pay' button.

5



If the transaction is successful, Loyverse POS will display final screen with the paid amount.

6



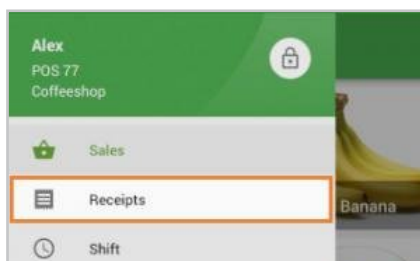
In case of an error in the transaction, Loyverse POS will show an error message.

Tap 'Dismiss' button, and you will return to selecting payment type screen. You can ask the customer to choose a different type of payment (for example 'Cash') or try another card.

Refund

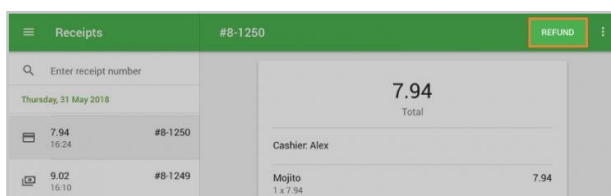
You can only refund the whole amount of card transaction. The card reader is not used in the refund process.

1



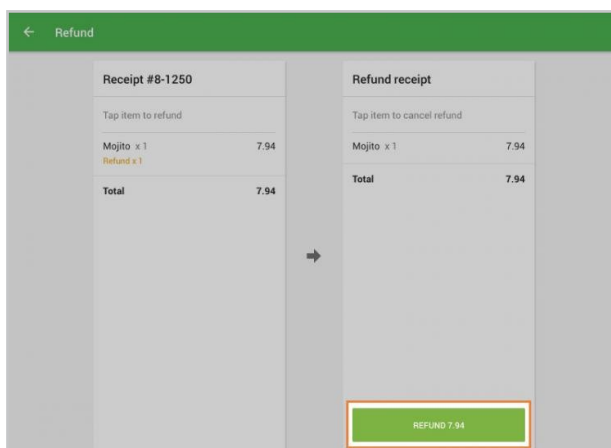
At Loyverse POS go to 'Receipts' menu, and tap needed receipt.

2



Tap 'Refund' button.

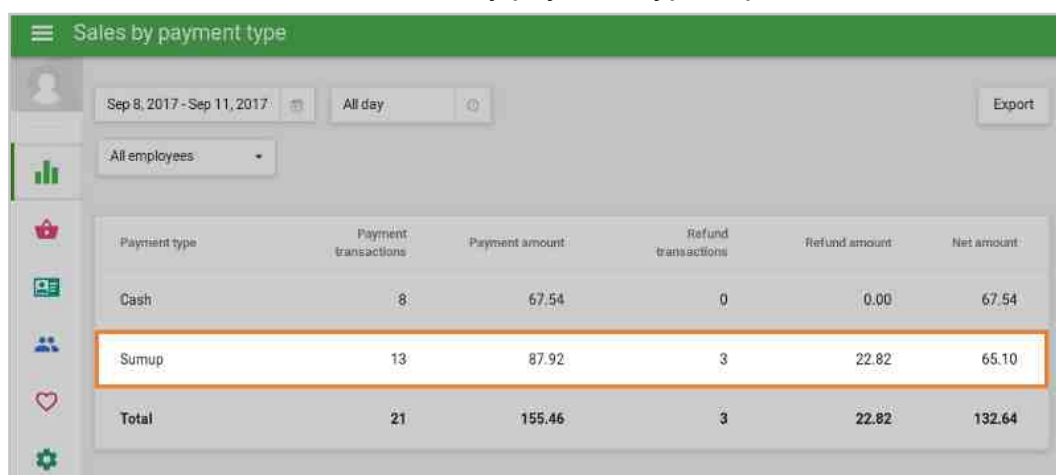
3



Select all items of the card payment from left ticket to move them to the right-side 'Refund receipt' list and tap 'Refund' button.

Reports

You can view the total number of transactions performed with the SumUp payment type. In the back office, select the 'Sales by payment type' report.



Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Cash	8	67.54	0	0.00	67.54
Sumup	13	87.92	3	22.82	65.10
Total	21	155.46	3	22.82	132.64

10.3 How to Accept Credit Cards with Loyverse POS and iZettle

Note

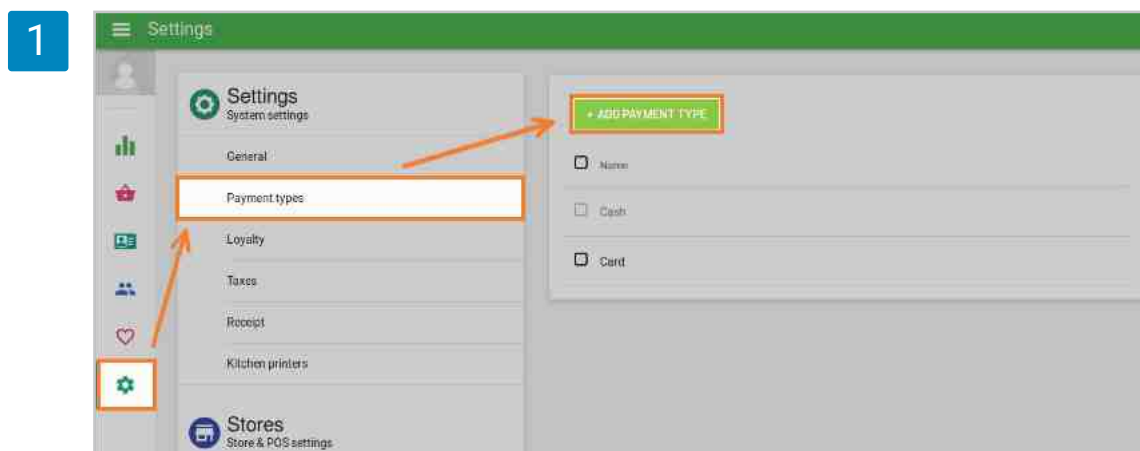
This feature only works on iOS devices.

Loyverse POS merchants can accept credit card payments via iZettle and it is available to customers in Brazil, Denmark, Finland, France, Germany, Great Britain, Italy, Mexico, Norway, Spain, Sweden, and the Netherlands.

Before connecting a card reader, you need to create an account in iZettle and receive the device.

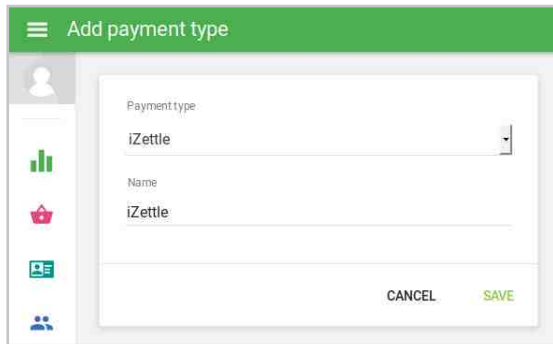
10.3.1 Connecting the Card Reader

Creating a payment type



Log in to the back office, click the 'Settings' menu and then 'Payment types.' Click the 'Add payment type' button to add a new type of payment.

2



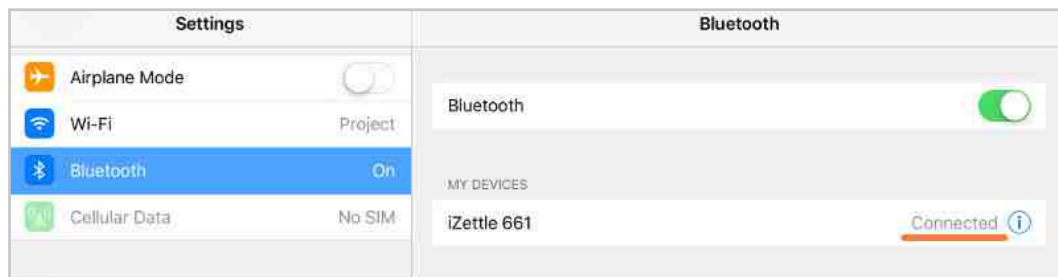
In the 'Add Payment Type' window, select the 'iZettle' payment type from the drop-down list. Save your changes when done.

3



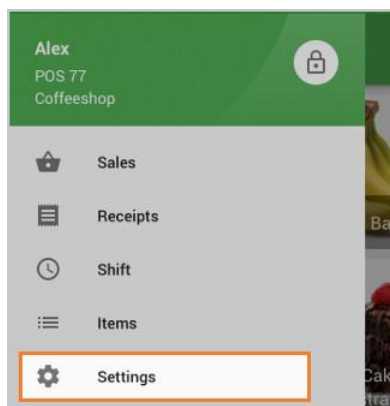
Turn on your iZettle card reader. On your mobile device, go to the Settings and turn on the Bluetooth. You will see the iZettle card reader in the devices list.

4

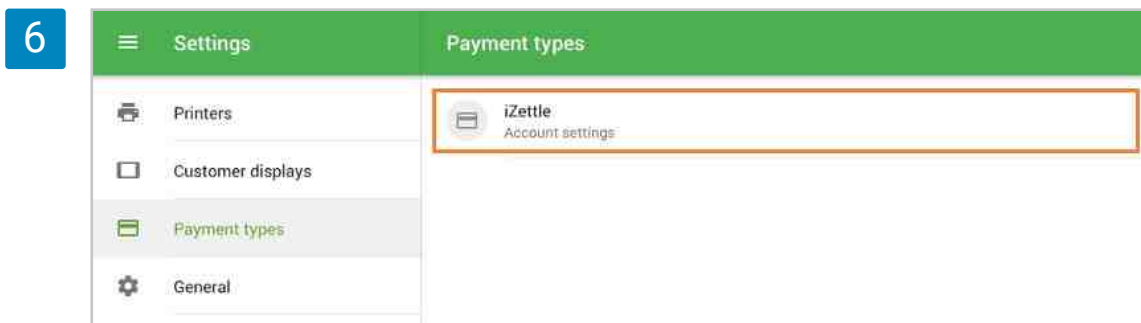


Tap on the iZettle device to connect. It will change its status to 'Connected'.

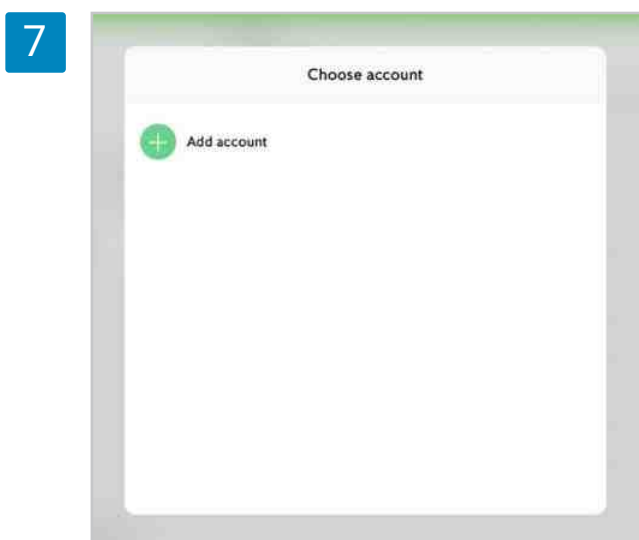
5



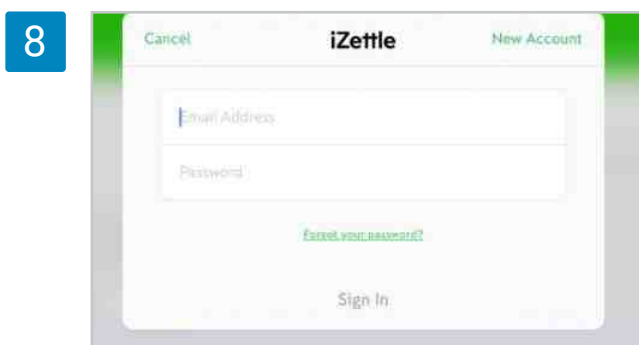
Then launch Loyverse POS and go to Settings > Payment Types.



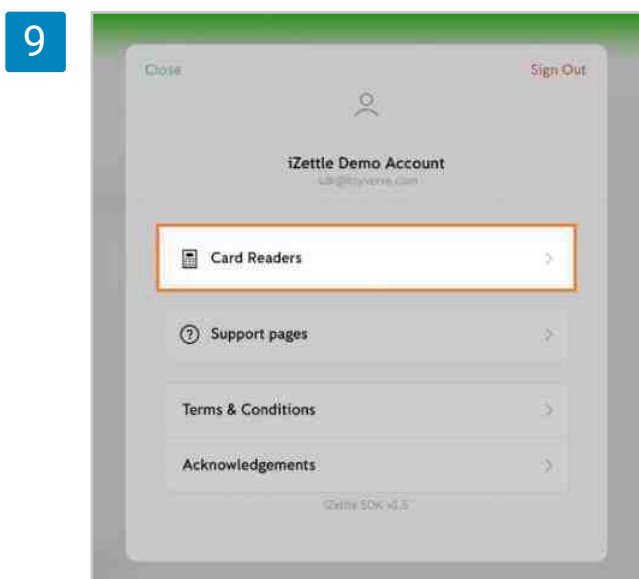
Tap the 'iZettle' button for account settings.



In the 'Choose account' window, tap the 'Add account' button.

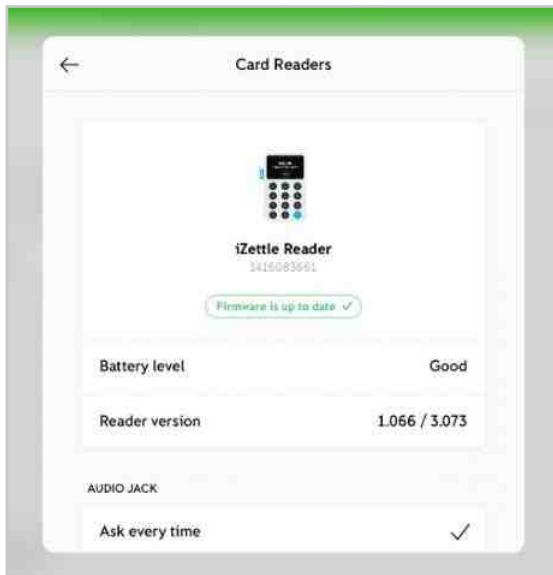


Enter the Email and Password of your iZettle account.



You will log in to your iZettle account.

10



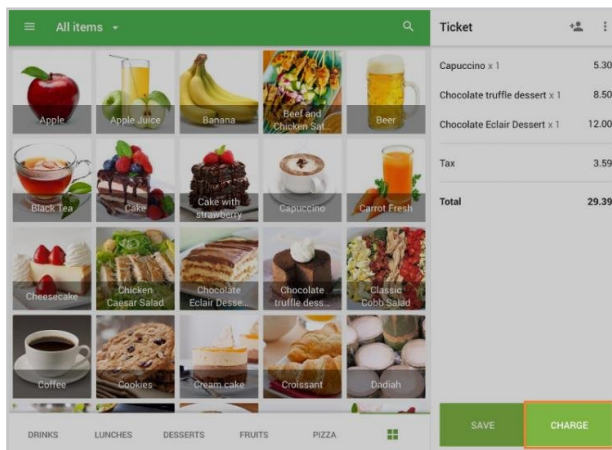
When you tap the 'Card readers' button, you will see information about the connected card reader.

Now you are ready to accept card payments.

10.3.2 Processing Payments

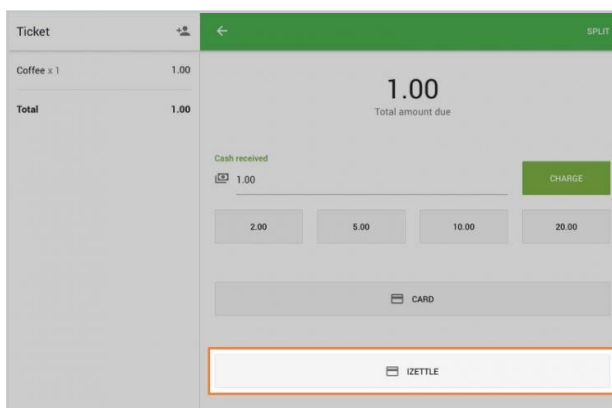
Payment

1



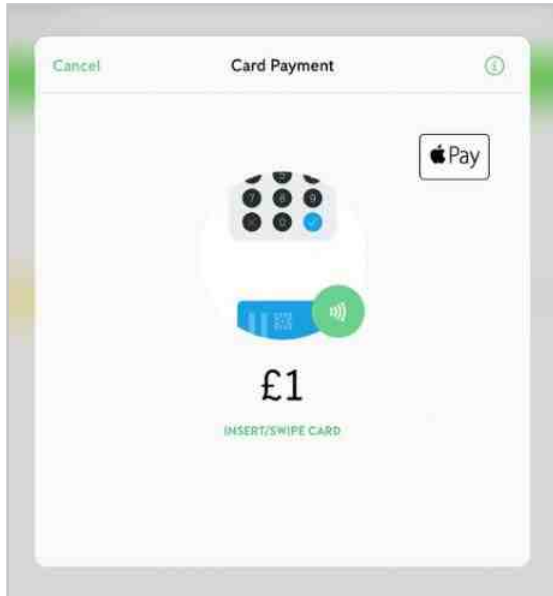
Add items to the ticket and press 'Charge.'

2



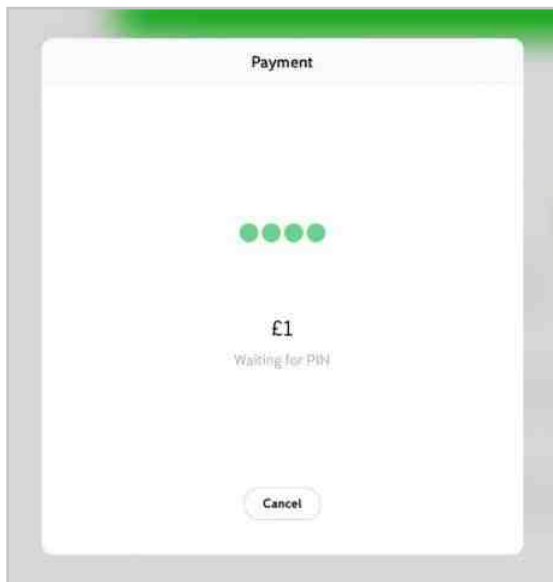
Tap the 'iZettle' button selecting payment type.

3



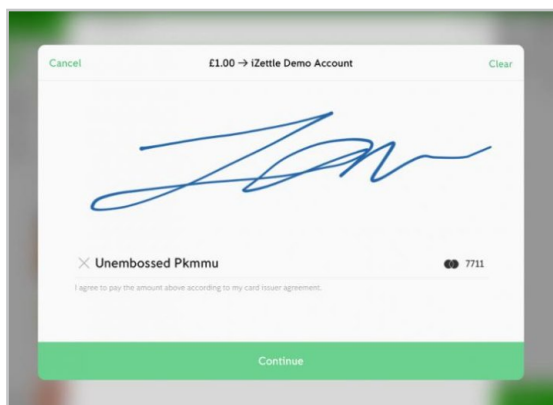
Loyverse POS will wait for a response from the card reader, and you will see an invitation to insert/swipe card on the card reader.

4



Insert your cards with a chip into the bottom slot of the card reader and give it to the customer to enter the PIN.

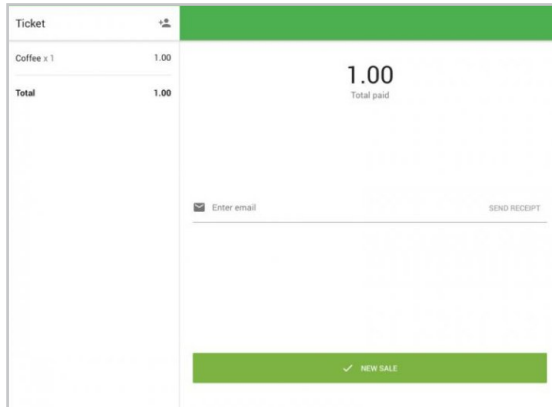
5



Or swipe it at the top slot and ask your customer to sign on the iPad screen.

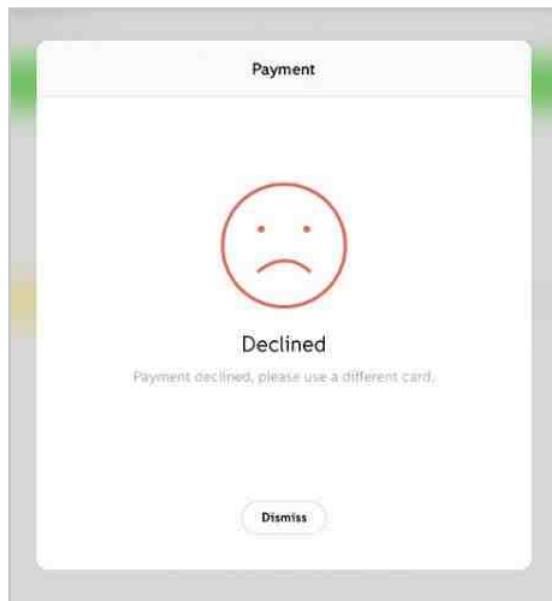
Tap 'Continue'.

6



If the transaction is successful, Loyverse POS will display the 'Transaction is successful' screen.

7



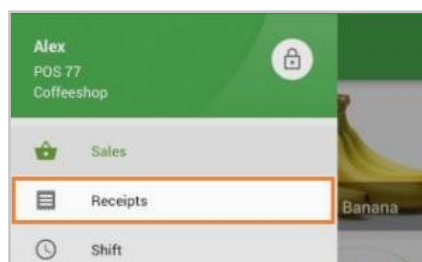
In case of an error in the transaction, Loyverse POS will show an error message.

Tap the 'Dismiss' button, and you will return to the 'select payment type' screen. You can ask the customer to choose a different type of payment (for example 'Cash') or try another card.

Refund

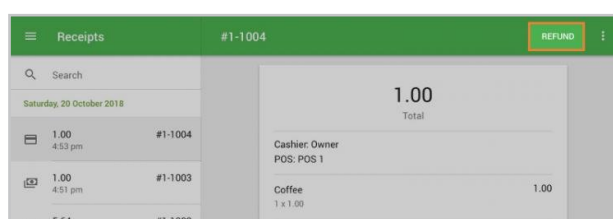
You can only refund the whole amount of transaction. The card reader is not used in the refund process.

1



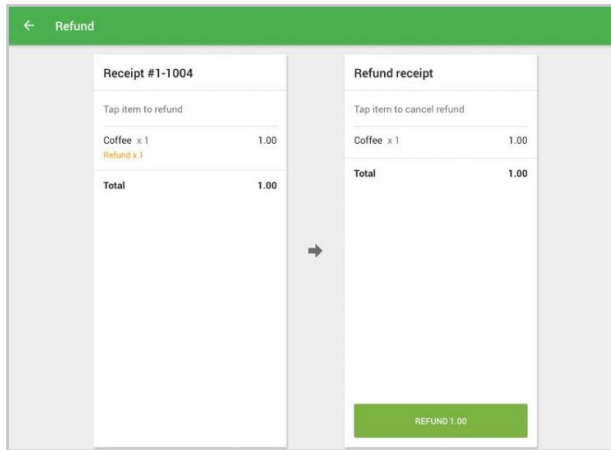
At Loyverse POS go to 'Receipts' menu, and tap needed receipt.

2



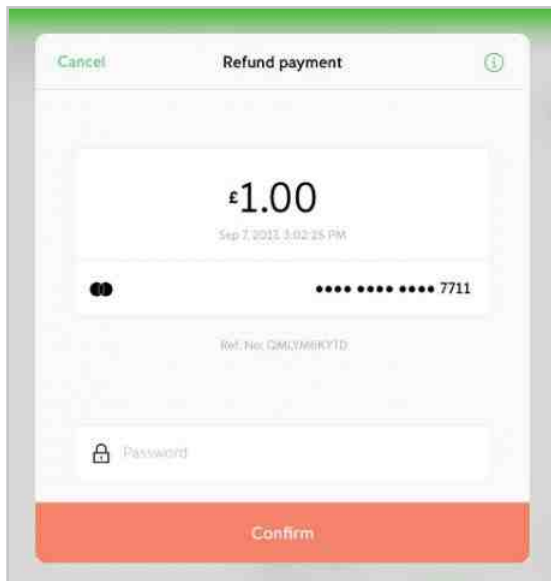
Tap 'Refund' button.

3



Select all items of the card payment from left ticket to move them to the right-side 'Refund receipt' list and tap 'Refund' button.

4

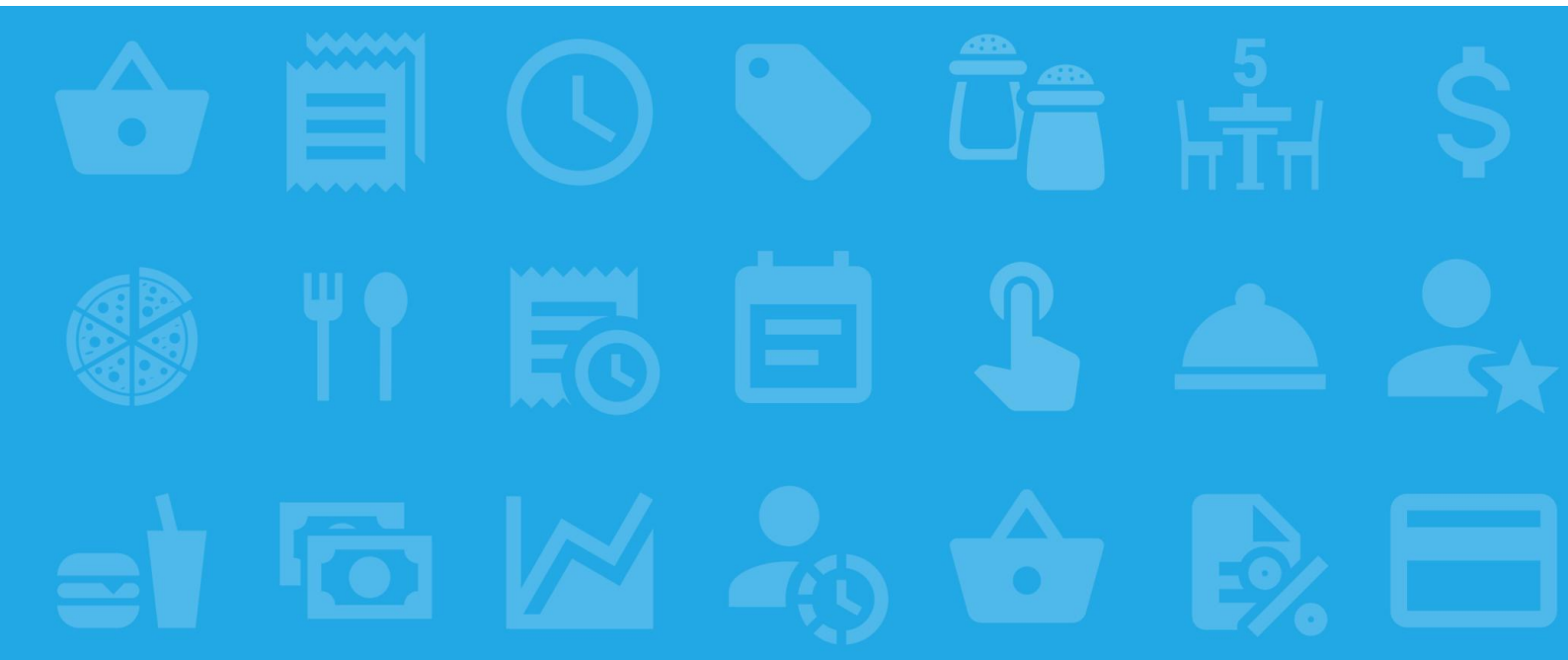


At the 'Refund payment' screen, type in the iZettle password in the 'Password' field and tap 'Confirm'.

Reports

You can view the total number of transactions performed with iZettle. In the Back Office, select the 'Sales by payment type' report.

Sales by payment type					
<div> Today Yesterday This Week This Month Sep 1, 2017 - Sep 7, 2017 All day Export </div>					
<div> All employees </div>					
Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	2	91.93	0	0.00	91.93
Cash	11	280.53	0	0.00	280.53
iZettle	3	3.00	0	0.00	3.00
Sumup	2	546.05	1	525.89	20.16
Total	18	921.51	1	525.89	395.62



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