



**User Guide
Version 5**

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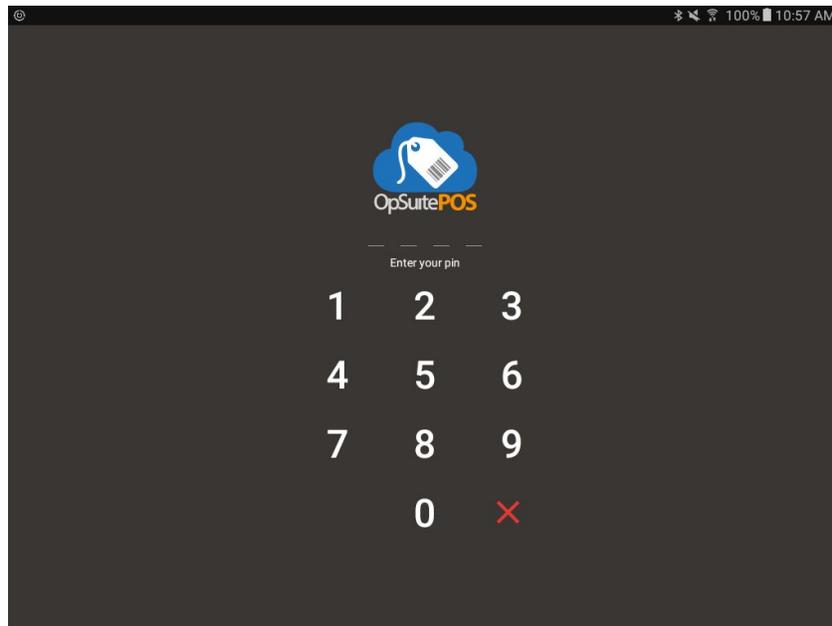
OpSuite POS - Next Generation Point of Sale

Welcome to OpSuite POS - the next generation of point of sale for retail. This document is provided for users and managers as a guide to help navigate OpSuite POS, perform transactions, opening and closing processes, and run simple reports.

OpSuite POS is available for Android devices running Android 4.4 and above.

This document assumes that the user understands basic use and navigation of Android devices.

Logging in to OpSuite POS

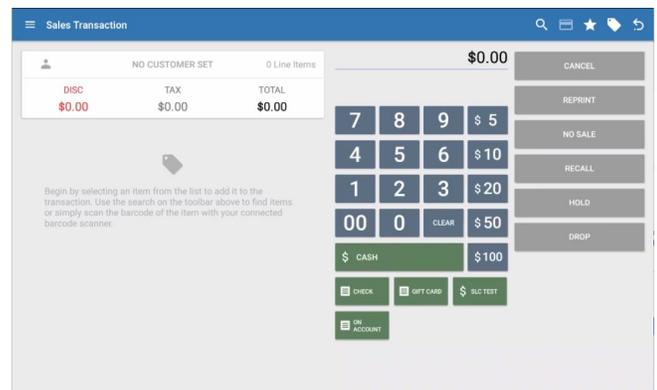


Once you open the OpSuite POS application, you will be prompted to enter a four (4) digit personal identification number (PIN). If you have not been assigned a PIN, please contact your administrator.

NOTE: Your PIN is your personal “password” to use OpSuite POS. Please keep this PIN private and safe from other people. Do not share your PIN.

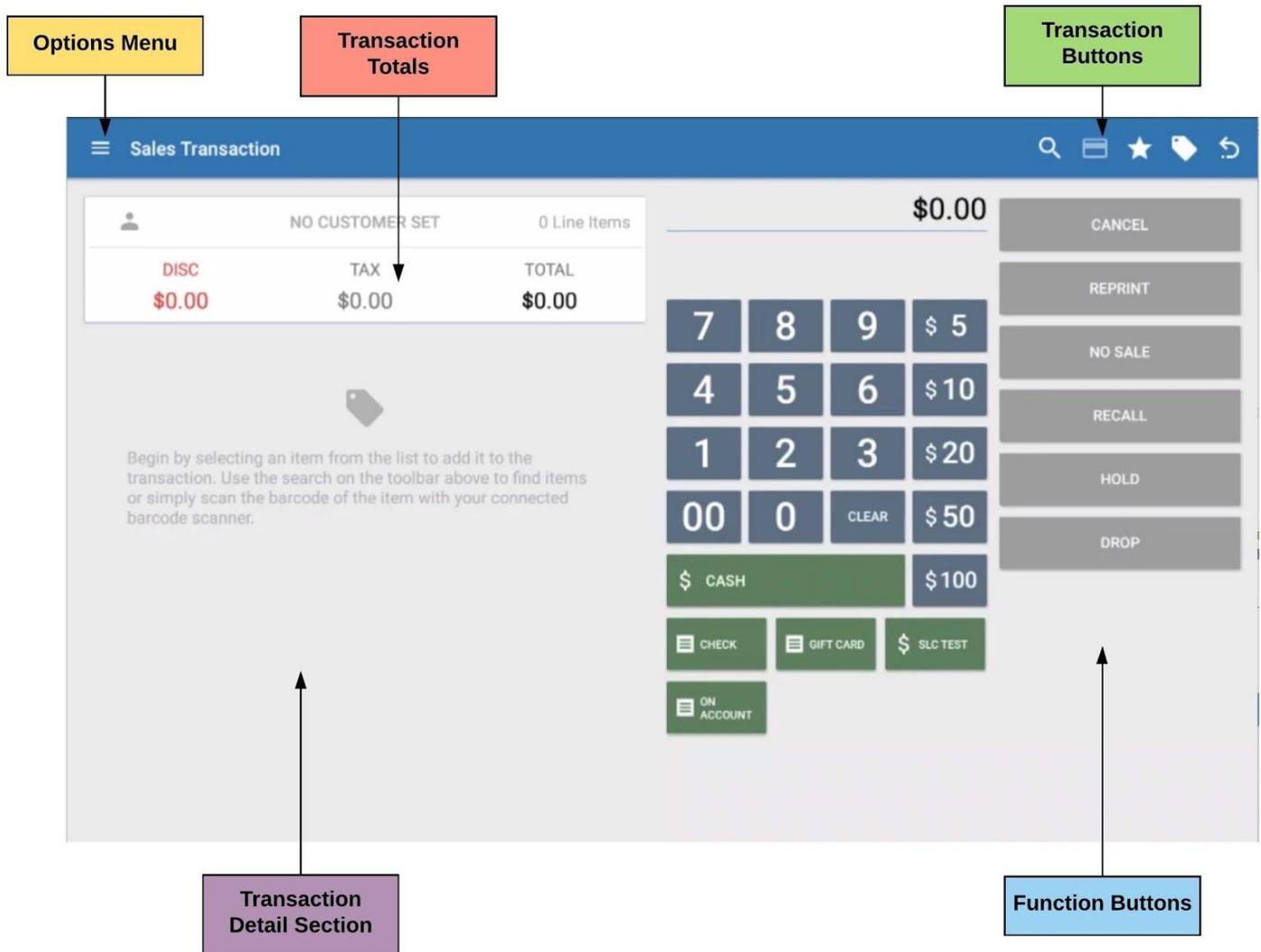
Upon login, you will see the Point of Sale main Sales Transaction screen (default screen). This screen is where users can perform sales transactions, returns, exchanges, etc., and is the base from which all other navigation happens.

If user rights permit, a user may use the menu button at the right to access various functions, including: Admin (Shift Opening and Closing), Settings, Records, and Reports.



Navigation

Let's get familiar with the basic screen layout of OpSuite POS. Below is a basic diagram of the different sections, panels, buttons and menus available to the user. These will be referenced throughout this document, so please refer to the below diagram as needed.



The **Transaction Buttons** are (left to right): Search, Payment (Main Screen), Favorites, Items, Transaction Menu (Add Customer, Remove Customer, Return Items).

The **OpSuite Menu** includes: Point of Sale, Inventory, Customers, History, Admin, Settings and Logout.

Opening a Shift

A shift could also be called a “drawer” or a “batch.” The basic concept is that when a register begins selling, a shift must be open in order for transactions, tenders, tax information, etc. to be tabulated for proper end of day procedures to be completed.

Shifts are required in OpSuite POS and if a shift has not been opened prior to the first transaction being completed, the system will prompt the user to open a shift and then take them to the admin module to perform a shift opening.

To open a shift, select the options menu icon located in the upper left corner of the screen. This will open up a drop down menu of available options.

Select Admin from the drop down list.



The Admin screen will appear with various options listed, including:

- Open/Close Shift
- End of Day Report
- Tender Summary Report
- Print Report



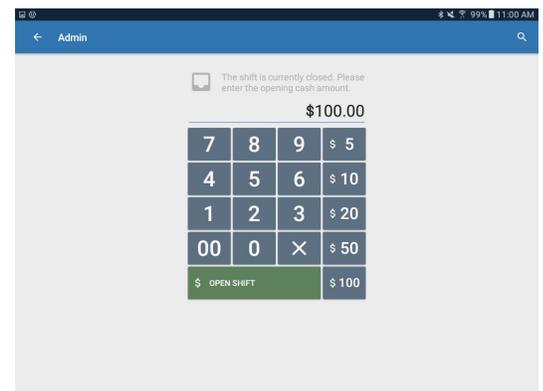
Select OPEN/CLOSE SHIFT.

The user will be prompted to enter the total cash in the drawer at the opening of the shift. This can sometimes be called “Beginning Cash,” or “Opening Till Amount”. It is the amount of cash (and change) in the cash drawer (till) at the start of the shift.

Enter the amount in the drawer (be exact to the penny) and then touch “Open Shift”. If entering \$100.00, type 10000 (the decimal is automatically entered).

A small message appears at the bottom of the screen that reads “The shift is now open”.

Simply click the back arrow next to Admin at the top of the screen to return to the Sales Transaction page.



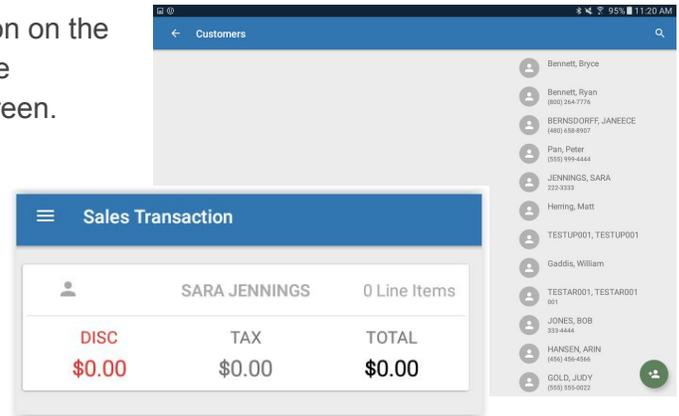
Sales Transactions

Adding a Customer to a Transaction

NOTE: It is not required to have a customer assigned to each transaction unless “Customer Required” is set in the application settings.

To add a customer to a transaction touch the Person Icon on the top left, or touch the “NO CUSTOMER SET” line above the transaction detail section (left) of the Sales Transaction screen. Either of these pop the customer list to the screen

From this screen, the user may search (using the magnifying glass icon), or scroll through customer records to locate the proper customer record, or add a new customer by touching the green circle “add customer” button in the lower right-hand side of the screen.



Once a customer has been located, simply touch the customer name in the list and they will be added to the Sales Transaction screen.

Removing a Customer from a Transaction

To remove a customer from a transaction (if added accidentally) the user may either select a new customer by touching the customer name above the transaction detail, or select the Remove Customer icon from the left of the customer name. This removes the selected customer from the transaction.

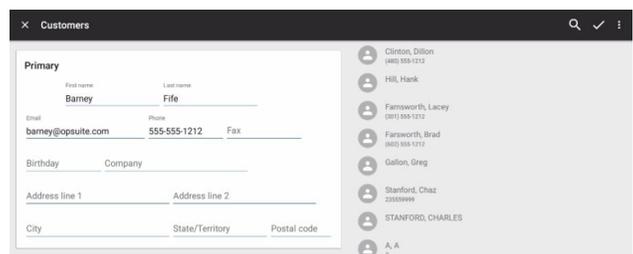
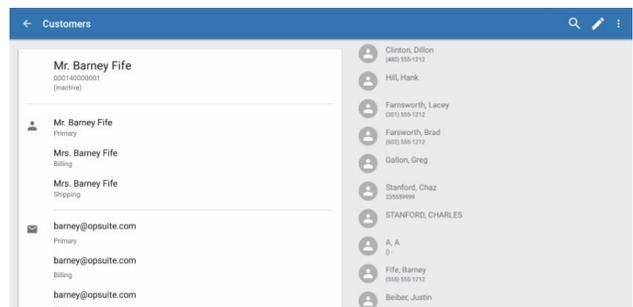
Viewing Customer Details from the Transaction

To view a customer’s information, tap on the customer’s name, and the information will appear to the left of the customer list.

To edit the customer’s information, select the pencil icon in the upper right corner.

All of the information fields will become enabled and the user can select the field to be edited. A keyboard will automatically pop up for easy editing.

When the edits are complete, tap the checkmark in the upper right corner to save.



Creating a Quick Customer from a Transaction

To add a new customer, touch the customer (person) icon or NO CUSTOMER SET field above the transaction detail section. The list of existing customers will appear. At the bottom right corner there is a green “add customer” button. By selecting this, a new customer record can be added.



Complete the required fields. Click OK, and the new customer will be added to the transaction in progress.

Adding Items to Transaction

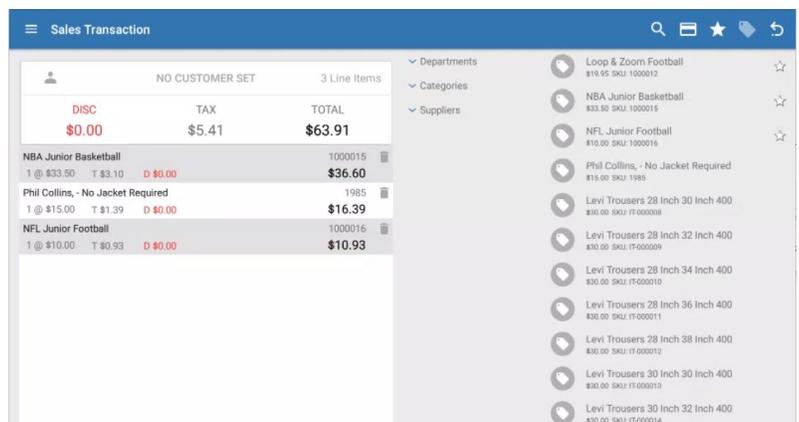
The most common way to add items to a transaction is to use a **barcode scanner** to scan the barcodes of the items which are being sold. This can be done from any of the transaction screens. In addition to scanning, the user may add items in the following ways:



Item List - Access the item list by selecting the tag icon in the upper right corner.

This will bring up a list of all items from which the user may scroll or search.

The user can narrow the item search (list) by Supplier, Department, or Category by selecting them in the drop downs to the left of the item list, or for a more specific search, the user can select the magnifying glass to search by SKU or product description.



To add an item to the transaction, select from the list by tapping the desired item once (tapping multiple times will add it to the transaction multiple times). The items will appear in the transaction details panel to the left.

Favorite Items - Access the Favorite items list by selecting the star tag icon in the upper right corner.

This brings up the favorites panel which only shows items that have been selected as favorites or starred items (see Favorites/Quick Picks later in this manual for information on how to add to this list).

The user can select from the favorites list quickly and easily by simply tapping the desired items. The items are added to the transaction details panel to the left.

NOTE: If an item is mistakenly added, it can be quickly removed by simply clicking the trash icon on the right side of the line item or by swiping it away from right to left.

Editing Line Items

After adding items to a transaction, the user may choose to edit a line to modify the quantity, price, or add a discount. Users can also change the sales tax (with proper user rights), add a shipping amount, or a comment. All of these edits can be done by tapping the appropriate field on the line.

To edit the quantity or price of an item, tap on the quantity field. The user can then manually enter the quantity and/or price.

NOTE: If a single item SKU needs to be sold at two or more prices, use the SPLIT button to separate multiple quantities of the same item into separate lines. To do this, tap SPLIT and then enter a quantity to split and tap the green checkmark. This will create multiple line items of the same item that can then be modified appropriately.

To add a discount to an item, tap on the D (discount) field. The user can then select to have a percentage discount or a dollar amount by tapping the appropriate radio button. The user should choose an appropriate discount Reason Code, enter the discount percentage or amount, and then click the green checkmark. This will update the entire line - including the item price, tax, and total.

To make a line item tax exempt or change the tax group of an item, tap the Tax in the line. The user can make the item Tax Exempt or edit the Tax for the item. The user should select the appropriate reason code for the change and then tap the green checkmark when complete.

The screenshot shows a 'Sales Transaction' screen for customer 'JOE SMITH'. At the top, there is a summary table:

DISC	TAX	TOTAL
\$0.00	\$0.00	\$15.99

Below this is a line item for 'J.G. Ballard - Crash 1' with a quantity of 1, price of \$15.99, tax of \$0.00, and a discount of \$0.00, resulting in a total of \$15.99. At the bottom, there is a 'SPLIT' button and a green checkmark.

The screenshot shows a 'Sales Transaction' screen for customer 'NO CUSTOMER SET'. At the top, there is a summary table:

DISC	TAX	TOTAL
\$1.88	\$1.22	\$18.09

Below this is a line item for 'Happy Feet' with a quantity of 1, price of \$18.75, tax of \$1.22, and a discount of \$1.88, resulting in a total of \$18.09. The screen includes a 'Reason Code' field and a 'Discount' field.

Global Transaction Edits

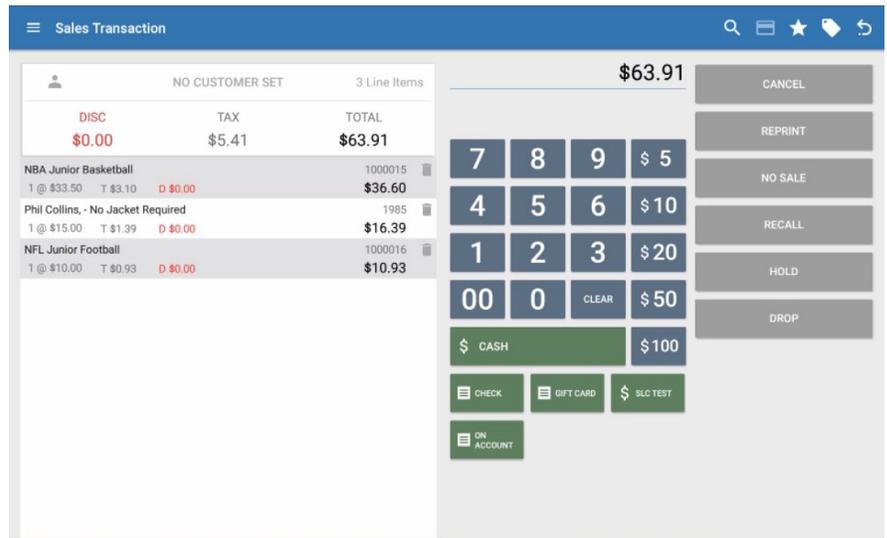
In some cases, the user may want to apply a discount, tax modification, shipping charge, or comment to the entire transaction. This can easily be done by tapping the appropriate field at the top of the transaction detail panel. The user can do a global discount by tapping the DISC field at the top left, tax modifications by tapping the TAX field in the middle, and add shipping or a comment by tapping the TOTAL field in the upper right. The same edits can be made here as are made in on the line items but apply to the entire transaction.

Completing the Transaction (Tendering Out)

When all items have been added to the transaction and the user is ready to complete/tender out the transaction, click the payment icon (looks like a credit card) in the upper right corner of the screen. This will bring up the Sales Transaction home page.



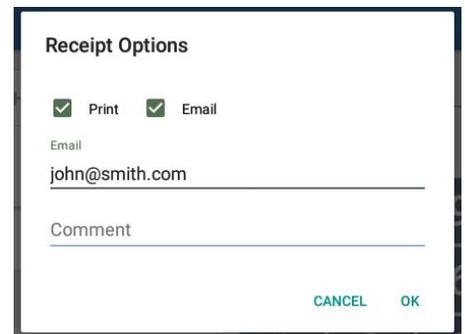
OpSuite POS has a Quick Pay feature that allows the user to tender the sale very fast if the customer is paying with a single tender and it is the exact amount. To do this, the user simply selects the appropriate tender button for the method of payment chosen (Cash, Check, Credit Card, etc.) and the transaction will be complete (it will ask for the user or customer to process the credit card, enter appropriate information, etc.).



If the customer is paying with multiple tender types or if cash is presented above the amount due, the user can key in the appropriate amounts and THEN select the appropriate tender button. This will allow the user to add multiple tenders and the system will show the change due, if applicable, at the end of the transaction.

Several optional pop-up alerts may appear, depending on setup (see Setup later in the document for more information). Some of these optional pop-ups include:

- Complete Transaction? This is an OK or Cancel option. OK proceeds forward while Cancel takes the user back to the transaction.
- Receipt Options. This allows the user to select print, email, or both options for the receipt. If email is selected, the user must enter an email address unless there is one already listed from the attached customer record. A comment can also be added here for the transaction, if desired.



If change is due, the amount due to the customer will appear and the cash drawer will open.

To close the transaction, select OK.



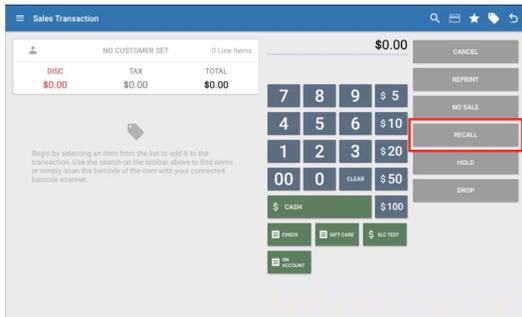
Return Transactions

OpSuite POS offers several options for processing return transactions: from a previous transaction, from a receipt, or by manually adding items to a return transaction.

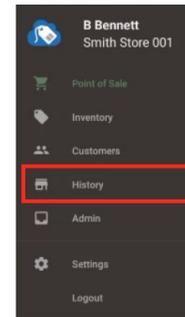
Return from a Previous Transaction

Users can look up a previous transaction from their device, location, or even other locations by selecting Recall from the Sales Transaction homepage or by selecting History from the options menu. Both options are shown below:

Recall from Transaction

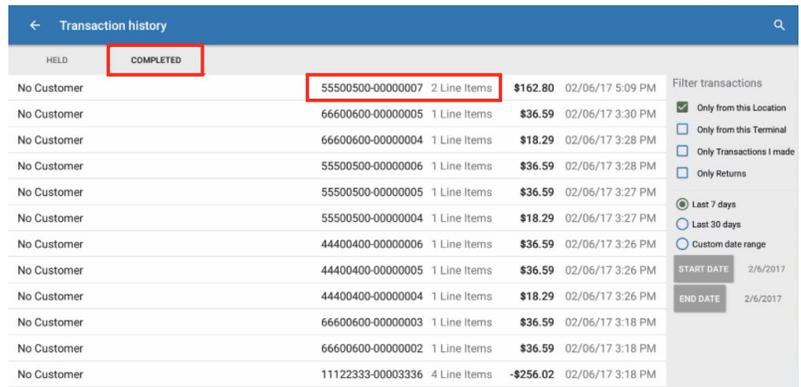


Select History from Menu



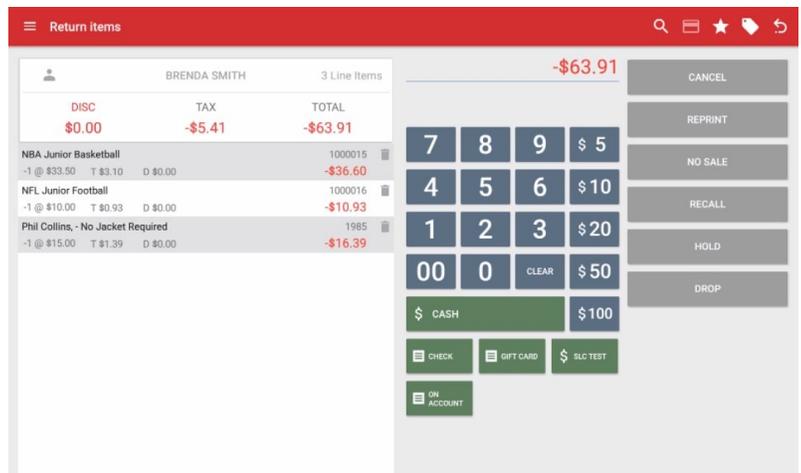
After selecting one of the above options, the Transaction History screen will appear.

There are two viewing options on the Transaction History screen: Held or Completed. In this case, the user will be viewing the Completed transactions. Select Completed.



The user will see a list of transactions (sorted chronologically) with various filter options to the right. The user can adjust the filters by selecting the appropriate date range, location and terminals, as well as user.

Once the user locates the transaction in question, they can tap the transaction number. After a few seconds, a list of the items from the transaction pop down and the user is presented with four options: VIEW/PRINT RECEIPT, VIEW/PRINT GIFT RECEIPT REFUND, and CREATE TEMPLATE(COPY TRANSACTION).



To create a return from the previously completed transaction, tap REFUND.

A refund transaction is created and can be completed as normal.

Return from a Receipt

If the customer requesting the return has an original receipt, the user can use the barcode scanner to scan the barcode on the receipt.

If the receipt is valid, a return transaction will be created and can then be completed as normal.



Return by Manually Adding Items to a Return Transaction

Users can perform manual returns (unrelated to a previous transactions) by changing to the return transaction mode before adding any items to the transaction.

To do this, select Return items from the transaction drop down menu (three stacked dots) in the upper right-hand corner of the screen.

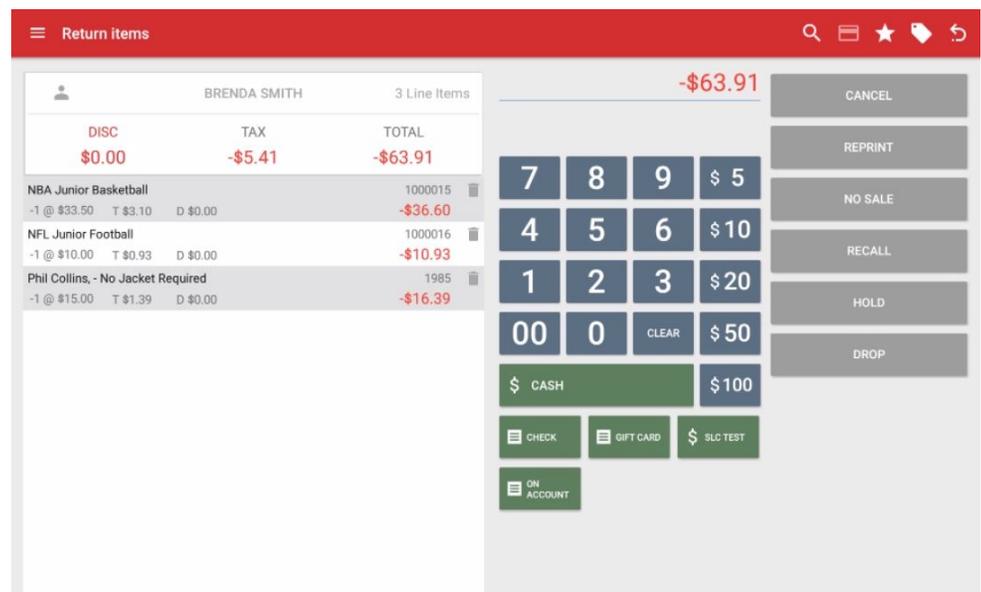


The Return Items screen appears.

The user may add items to the return transaction in the same ways used to add items to a standard transaction (barcode scanner, item list, or favorites).

Complete the transaction the same way used to complete a standard transaction.

The system will pop up a screen that shows the amount of change due to the customer (if returned in Cash).



Exchange Transactions

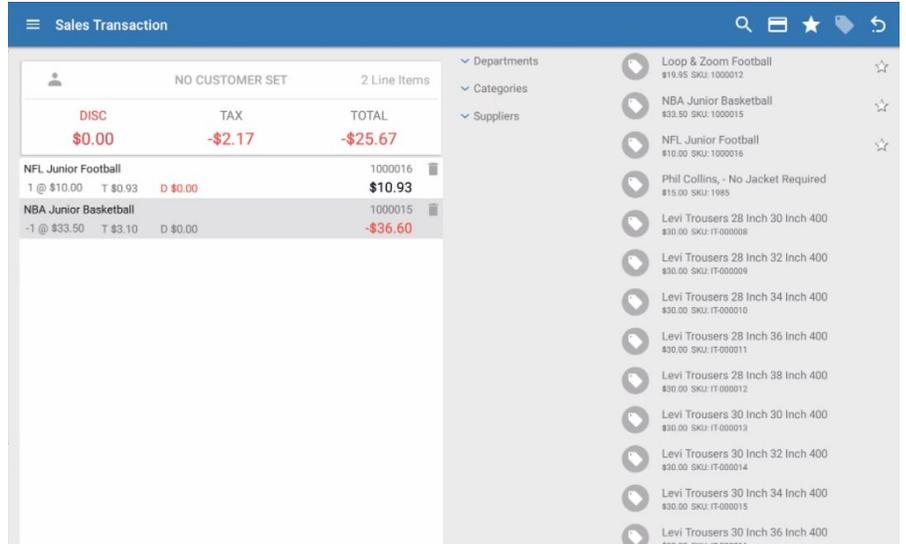
An exchange transaction is a transaction where one or more items are being returned and one or more items are being sold on the same transaction. This type of transaction is usually used when a customer requests an exchange from one size of an item to another (or one color to another) but can be used for a variety of reasons.

To perform an exchange transaction, add the item(s) to be sold to the Sales Transaction first.

Then select Return Items from the menu and add the item(s) being returned (see Returns section above if needed).

Select the the payment icon to complete the transaction.

If there is any difference in price, there will be a change due, or a balance due. Treat this like a normal sales transaction.



Closing the Shift

Closing the shift at the end of the day/selling period is important to do in order to maintain proper retail procedures and validate/verify that the proper amounts are in the cash register, credit card batch, etc. It is recommended that this process be done daily or at the end of each selling period (if shorter than a day).

To close the shift, select Admin from the options menu icon located in the upper left corner of the screen.



Select OPEN/CLOSE SHIFT on the Admin page.

The End of Day summary screen will appear with the details of the day/period. At the top of this screen there is a line showing the drawer number, register, cashier, and shift start date and time. These are not editable but may be useful for informational purposes.

A screenshot of the "Admin" screen showing the "End of Day" summary. The screen has a purple header with a close button and the word "Admin". Below the header, it displays "End of Day" and summary information: Drawer: 0, Register: 0, Cashier: DevQA6, Shift Start: 01/23/17 6:03 PM. A table follows with columns for Tender, Count, Expected, and Variance. The "Count" field for "Cash" is highlighted with a red box and contains the value "\$140.25".

Tender	Count	Expected	Variance
Cash	\$140.25	\$140.24	\$0.01

Also listed are each of the tender types that were used during the day/period with a field for Count, Expected, and Variance.

The user will enter the total tender count (what the user counted from the cash drawer or credit card batch) using the numeric keypad and by tapping the appropriate tender button. This will apply the entered count into the count field and update the variance field.

Do this for each tender type.

Next, select how much cash will be left in the Till for the next shift and enter it in the "leave in till" field under the close section. Once entered, the total deposit for this shift will be calculated for the shift on this POS device.

NOTE: The Close section displays the starting balance, gross sales, returns, discounts given, sales tax, cash draws, cash drops, and net sales. These are calculated fields and cannot be edited by the user.

A screenshot of the "Close" screen. It has a purple header with a search icon and a checkmark. The screen displays a list of financial items with their corresponding values. The bottom three items are highlighted with a red box: Total Cash/Checks: \$140.25, Leave In Till: \$100.00, and Total Deposit: \$40.25.

Starting Balance:	\$100.00
Gross Sales:	\$49.95
Returns:	\$9.99
Discounts:	\$0.00
Sales Tax:	\$0.28
Cash Draws:	\$0.00
Cash Drops:	\$0.00
Net Sales:	\$40.24
Total Cash/Checks:	\$140.25
Leave In Till:	\$100.00
Total Deposit:	\$40.25

End of Day and Tender Summary Reports

The End of Day and Tender Summary reports show the transactional balances and tender summary for the shift. If these reports are run mid-shift, they will show the totals to that point. Many store managers or owners like to have these reports run and printed on a daily basis and saved with the files.

NOTE: Running the End of Day Report does NOT close the shift, day, or period. The user MUST perform the CLOSE SHIFT procedure in order to properly close the shift.

To view and print the End of Day or Tender Summary Report, select END OF DAY REPORT (or Tender Summary Report) from the Admin options. This report may be printed to the selected receipt printer.

The screenshot shows the Admin interface with a blue header bar containing a back arrow and the word "Admin". On the right side of the header is a search icon. The main content area is divided into two sections. The left section displays the "Current Batch" report, and the right section contains three green buttons: "OPEN/CLOSE SHIFT", "END OF DAY REPORT", and "TENDER SUMMARY REPORT". At the bottom of the right section is a "PRINT REPORT" button.

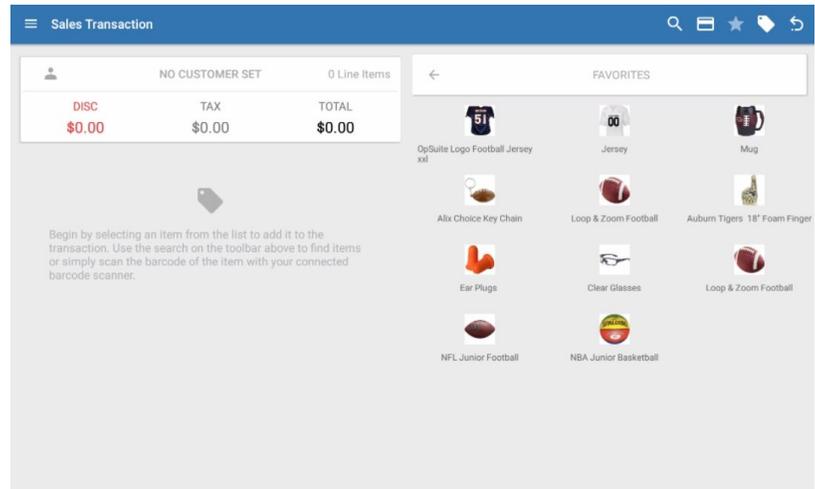
Current Batch			
Store No. 08			
Smith Store 001			
123 11ase st			
New Orleans, Louisiana 70345			
Date	14-Jul-2017		
Time	03:53 PM		
Register	8 1		
Batch No.	30		
Cashier(s):	Wilson Turner		
Wilson Turner			
Period Totals			
Gross Sales			128.35
Discounts			0.00
Returns			92.00
Tax Total			3.37
	Auburn Tax1	3.00	
	MT Tax Rate	0.36	
Shipping Total			0.00
Total			39.72
Opening Drawer			100.00
Paid Out			0.00
Dropped			0.00
Paid on Account			0.00
Total Drawer			0.00
Closing Counts			
	Expected	Count	Over/Short
Cash	0.00	0.00	0.00
Closing Total	0.00	0.00	0.00

Favorites/Quick Picks

Favorite items/Quick Picks is a great way to display frequently sold items (or items that are not bar coded, close to the point of sale, service items, etc.) on the POS screen for each access to the user/cashier.

To get to the favorite items, select the star tag icon.

Note: Items included in Favorites/Quick Picks will also include their item photo from OpSuite, if attached.



Adding Items to Favorites/Quick Picks

There are two ways to add items to the Favorites/Quick Picks list. The primary method is to add them in the Quick Picks module within OpSuite. The secondary method, if items need to be added immediately or temporarily, is to add them within the POS app.

Adding Quick Picks in OpSuite

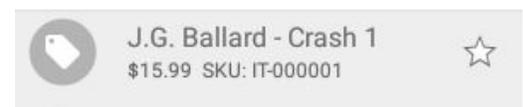
SEE OPSUITE USER DOCUMENTATION

Adding Favorites in POS

To add items to your Favorites, select Inventory from the options menu on the far left of the screen. The inventory module will appear with a list of items.

Locate and select the item to be added to Favorites.

Tap the STAR icon in the upper right of the screen. This puts a star next to the item in the list and sets it as a favorite. Repeat this process as needed for other items.



The item will now be located in the Favorites/Quick Picks window.

Customers

OpSuite POS includes a customer module where customers can be searched, added, edited, and viewed. This customer database is shared with OpSuite and is updated bidirectional as soon as changes are made on either side, keeping your OpSuite CRM data constantly up to date and accurate.

Customer records can be attached to transactions and one to one marketing, loyalty programs, reports, and other CRM related tasks can be done within OpSuite virtually instantly.

We have already addressed adding and editing customers from the transaction screen, here we are going to cover the customer record and the details the user can find or add on the record.

The customer module is accessed by selecting Customers from the Options Menu (upper left corner of the screen).

The customer list can be searched (using the magnifying glass in the upper left) or scrolled up and down. Tap a customer in the list to view their record.

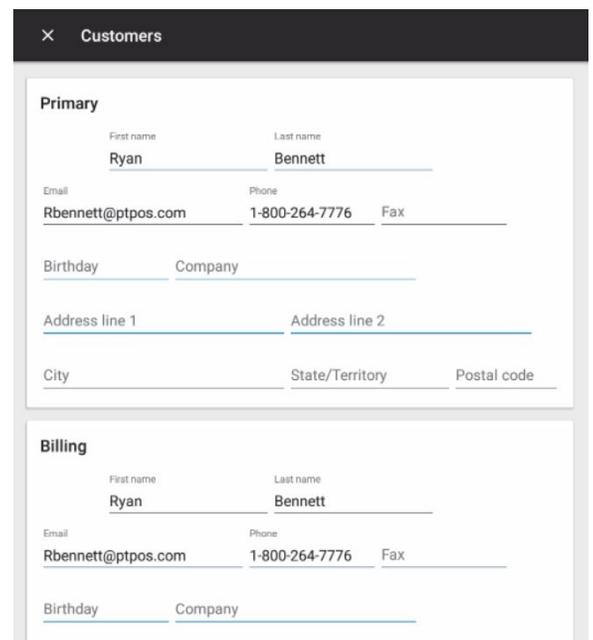
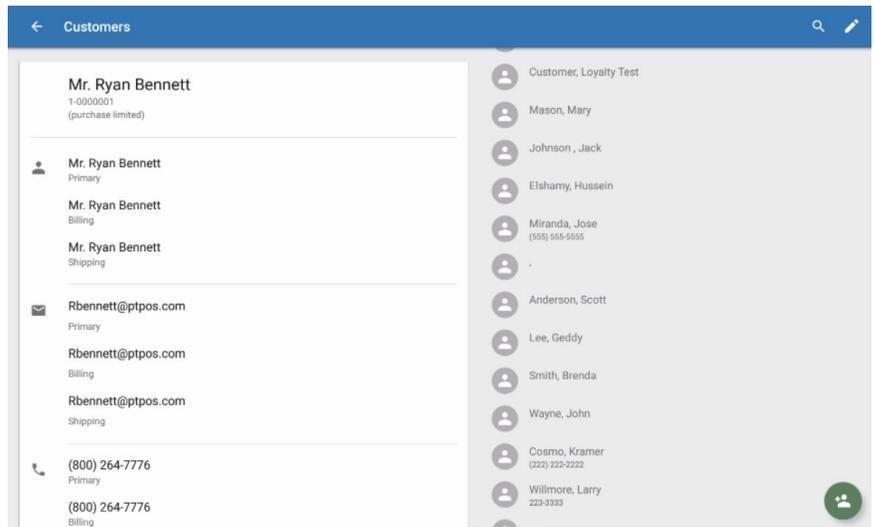
Customer records include a primary contact and associated information as a default but can also include an almost infinite number of secondary contacts, such as shipping address, family members, etc. A typical customer might include primary and shipping addresses but the options are there to add more.

To Edit a customer, tap the edit button (pencil icon) in the upper right of the screen. This enables the edit mode. Once the user taps a field, the keyboard will appear to allow for data entry.

NOTE: Required fields MUST be filled prior to saving. Warning will appear if required fields are not completed or completed properly.

Adding a new customer record to the list is very simple as well. Simply tap the green add customer icon in the lower right corner of the screen. This will display a new customer record (blank) that can be completed by the user. Tap the save button (checkmark icon) in the upper right of the screen to save the record. Newly added customers can be used on transactions immediately.

Another cool feature of the customer record is the list of recent transactions on the customer record in view mode. Select the customer and scroll to the bottom of the record to see recent transactions.



Inventory

Inventory records in OpSuite POS are designed to be fast and simple. All inventory editing or adding of new items is done in OpSuite - not in the POS - therefore, the item records in POS are limited in what is displayed.

To access the inventory module in POS, select Inventory from the Options Menu (upper left corner of the screen).

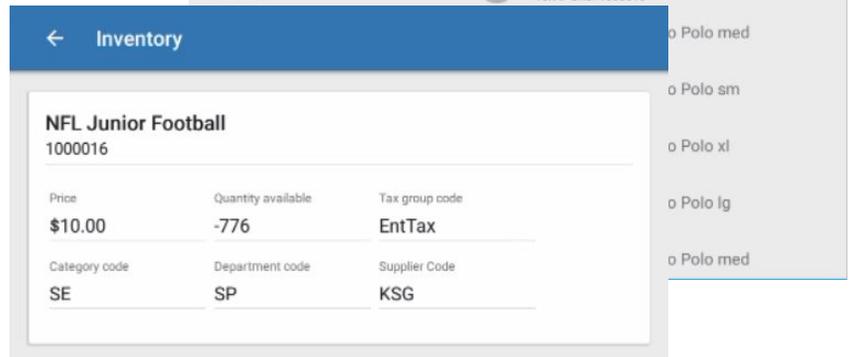
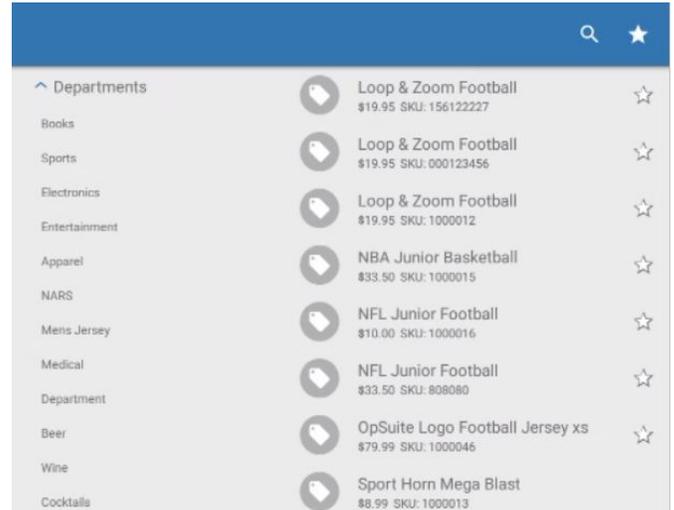
The inventory list screen will appear with a base list of items.

The user can filter the list by selecting from the Departments, Categories, or Suppliers drop down lists to the left of the item list. This limits the items to the specific choices made in this filters.

Select an item by tapping the item description in the list.

The item record (as mentioned above) is limited to a small selection of the total number of fields that are kept within OpSuite. This screen is view only.

NOTE: Starred items are items that are set as Favorites in the system for the POS. See Favorites/Quick Picks for information on this feature.



Settings

Settings (available to admin users only) for OpSuite POS can be managed in OpSuite or directly in the OpSuite POS app. These settings control various features and functions within the app. There are four options or tabs within settings: Hardware, App, About, and Diagnostics.

Hardware Settings

Hardware settings include necessary settings for various hardware devices and peripherals that are to be used with the POS register.

Terminal Settings - Set the terminal type for the device.

Cash Drawer Settings - Select the connection method for the cash drawer (Printer, Direct to the Terminal, or None).

Printer Settings - Set the printer model (or driver type) being used with this POS device and the connection method, if known: USB, Serial, WiFi, or Bluetooth.

Customer Display Settings - Set up the customer display (if applicable), whether an attract message will be displayed with the system is idle, and the various messages to display when the transaction is complete and the attract messages.

App Settings

App Settings affect how the application behaves which alerts or messages appear during transactions and the settings for credit card processing. This is also where the user can change locations for the device and resync the data for the device.

Transaction Settings:

Require a customer for each transaction - If checked, requires a customer be included on each transaction.

Prompt to close transaction - If checked, DOES NOT prompt for close transaction.

Prompt receipt options - If checked, prompts the user for print or email receipts and allows for adding an email address and/or comment.

Print customer copy of card signature receipt - If checked, prints a second receipt for all credit card transactions which includes a signature line.

Store and Forward Mode - If checked, the device is in store and forward mode (credit card transactions will NOT be checked for authorization or validity. Transactions will be stored for later update. This option should only be used in extreme cases where internet is not available and you must take credit card transactions. YOU are completely responsible for any losses due to invalid, fraudulent, or insufficient funds situations as a result of using this option. DO NOT CHECK THIS UNLESS YOU UNDERSTAND THE CONSEQUENCES.

Wait for Card Removal - If checked, system waits for EMV cards to be removed before completing trans.

Payment Processor Settings: This is where the payment processor (credit cards) is managed. It is not recommended that users change these settings without assistance from our support team.

Change Device Location: This allows the user to change the inventory location to which the device is attached. The device must have an internet connection and the shift must be closed.

NOTE: Changing the device location resets the device and resets the configuration (settings). This should not be done without a clear understanding of the effects of this process. Contact support for more information or assistance.

Resync Data: Normally, this should not be required under standard system use and proper initial setup. Use only if instructed by an OpSuite POS support technician.

Diagnostics

Diagnostics is primarily used with our support team to help troubleshoot or diagnose certain issues or concerns. This section should not be used for standard daily processes.

About

The About menu option lists various important bits of information including: OpSuite POS version number, Last sync time, Location to which the register is assigned, Cashier who is logged in, Device status, Network status, and Printer status. This information is generally used when speaking with support or a customer service representative.

Supported Hardware

This list of supported hardware will be changing constantly (added to), so please check with your OpSuite POS reseller for information on the latest devices and peripherals we support.

POS Hardware

- CRS Sam4s POS (Android version 4.4 or higher)
- ELO Paypoint (Android version 5.2 or higher)
- Samsung Galaxy Tab A (Android version 5.2 or higher)

POS Peripherals

Receipt Printers

- CRS
- Star
- Epson

Cash Drawers

- APG
- CRS

Barcode Scanners

- Honeywell Bluetooth
- Socket Mobile Bluetooth

Customer Displays

- Sam4s
- ELO

POS Scales

- Coming Soon

POS Payment Providers and Devices

- CAYAN Genius
 - Verifone 915 and 925
 - BBPOS Mobile
- PayGuardian by Bridgepay
 - Ingenico iPP320 and 350
 - Ingenico iCMP (Coming Soon)
- TranCloud by Datacap Systems
 - COMING SOON