

Back Office - User Manual

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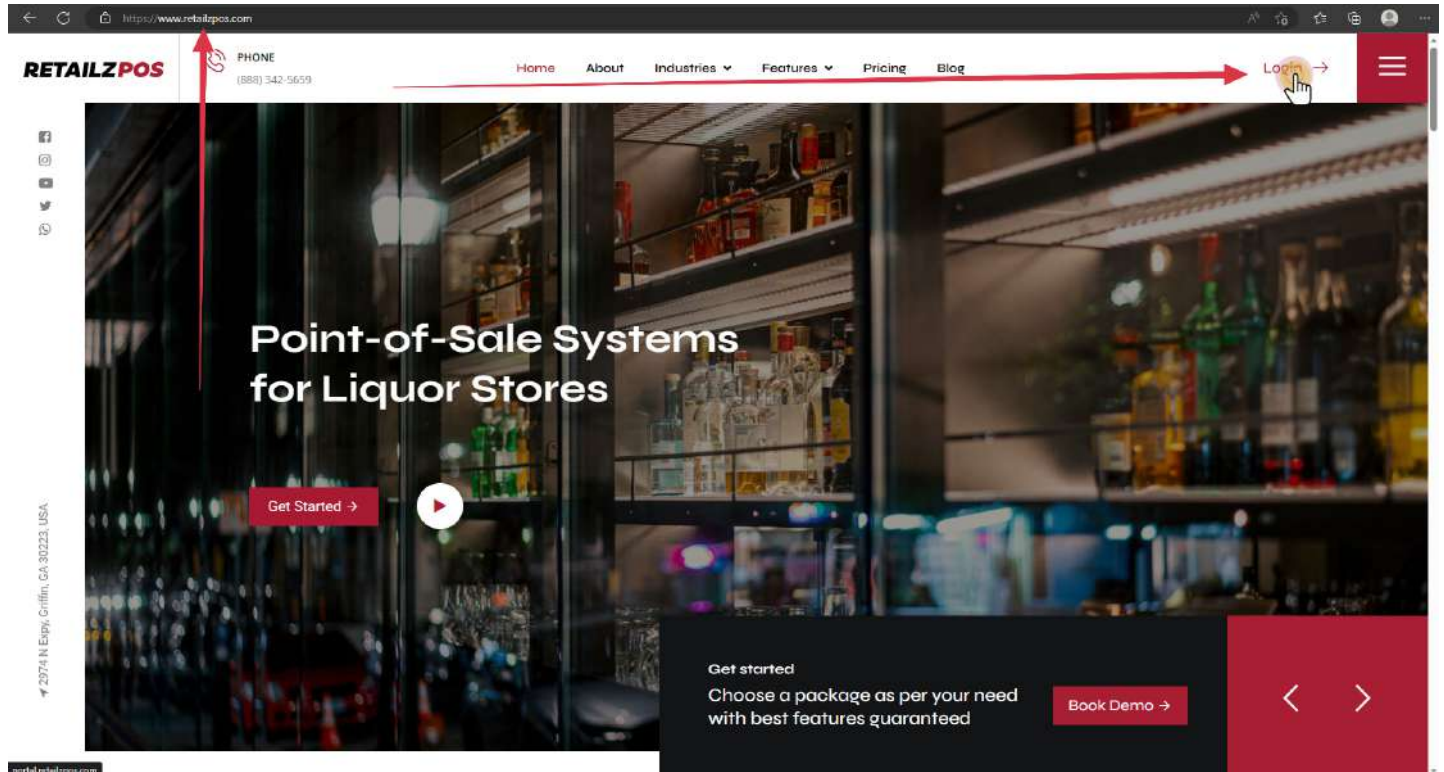
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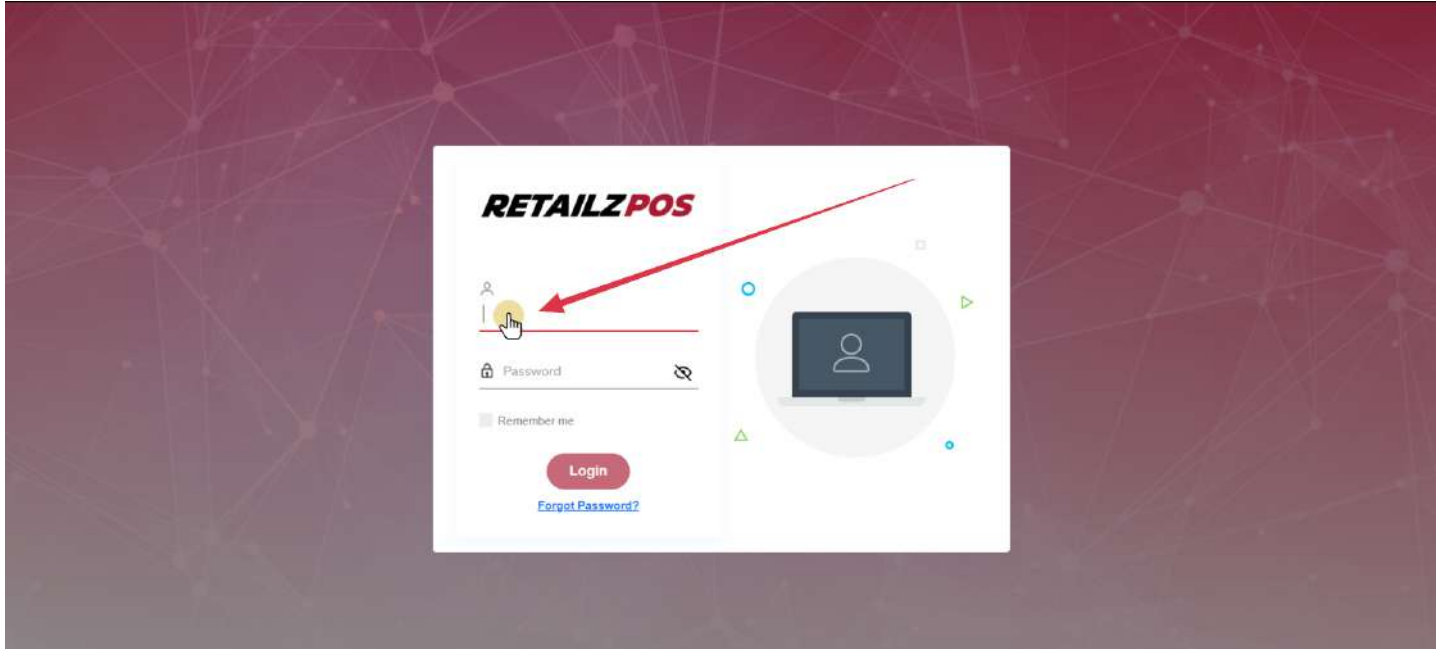
1 Web Portal - Access Web Portal

Go to www.retailzpos.com and click Login to access your store back office portal



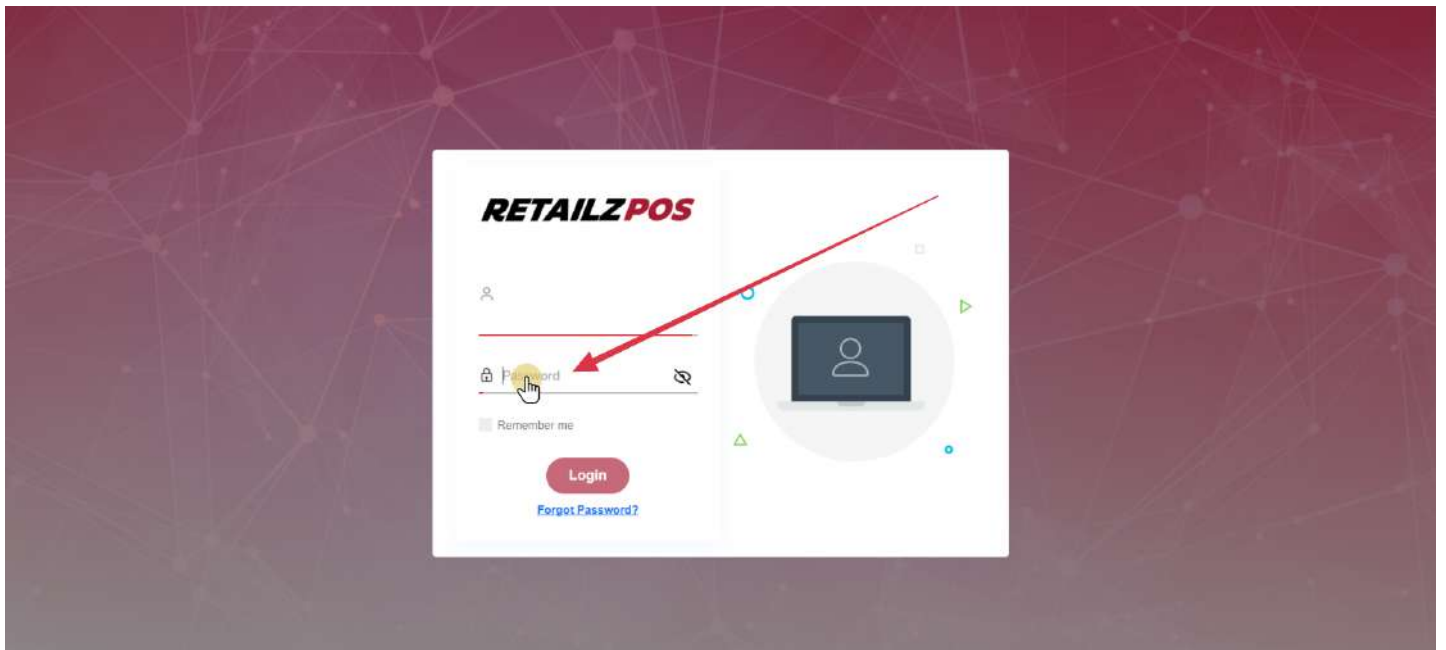
1.1 Web Portal - Email

Enter your store email



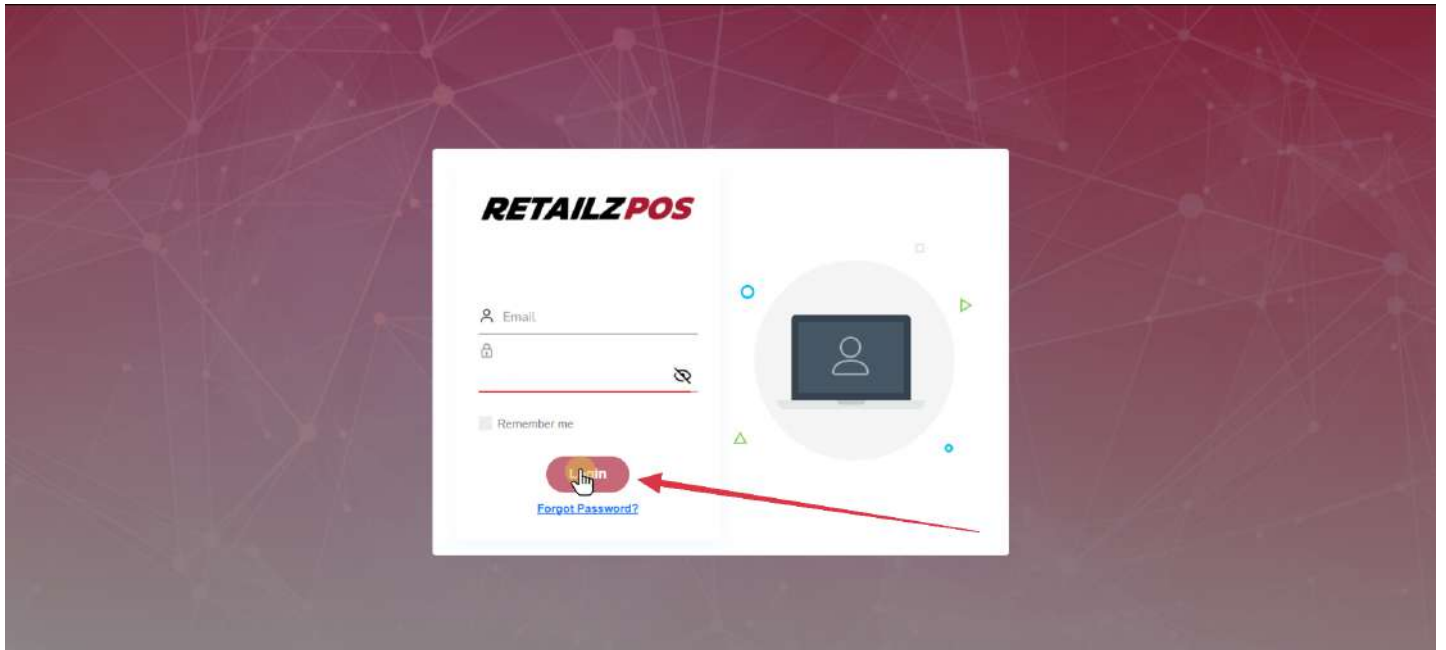
1.2 Web Portal - Password

Enter your store password



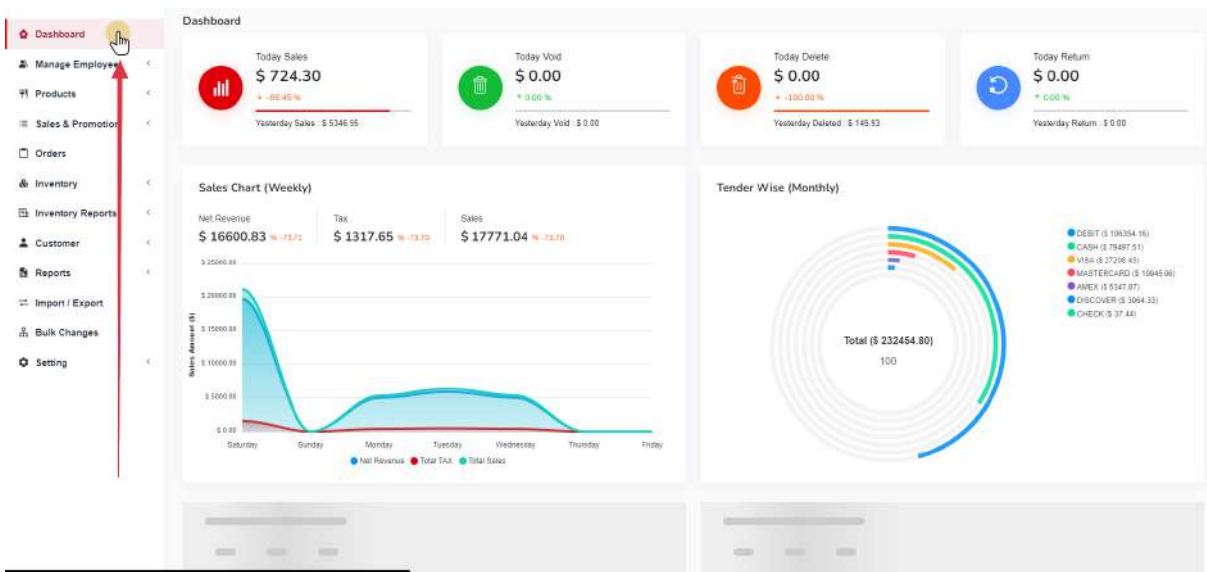
1.3 Web Portal - Submit Login

Select **Login** to access your store back office



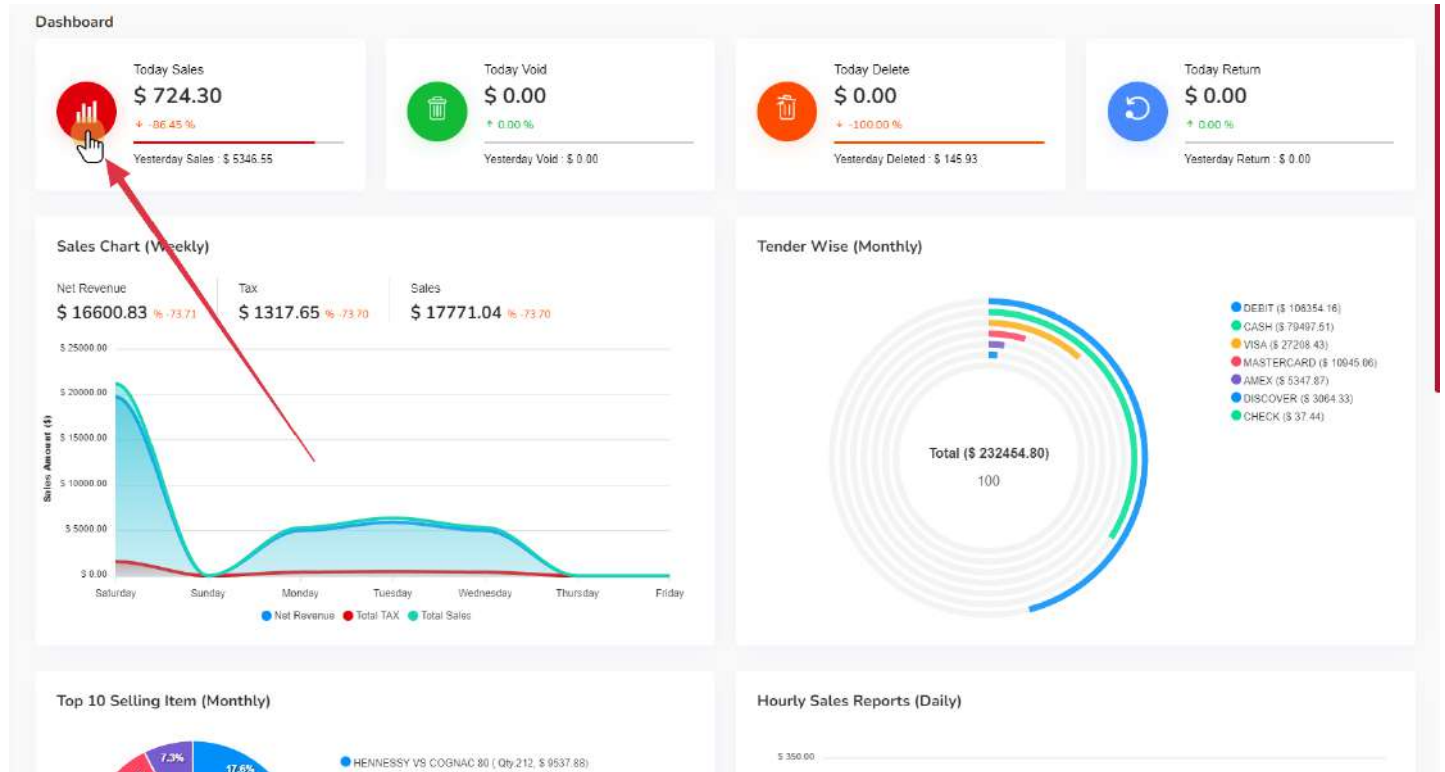
2 Back Office - Dashboard

From the RetailzPOS **Back Office**, click **Dashboard** to access your stores sales dashboard



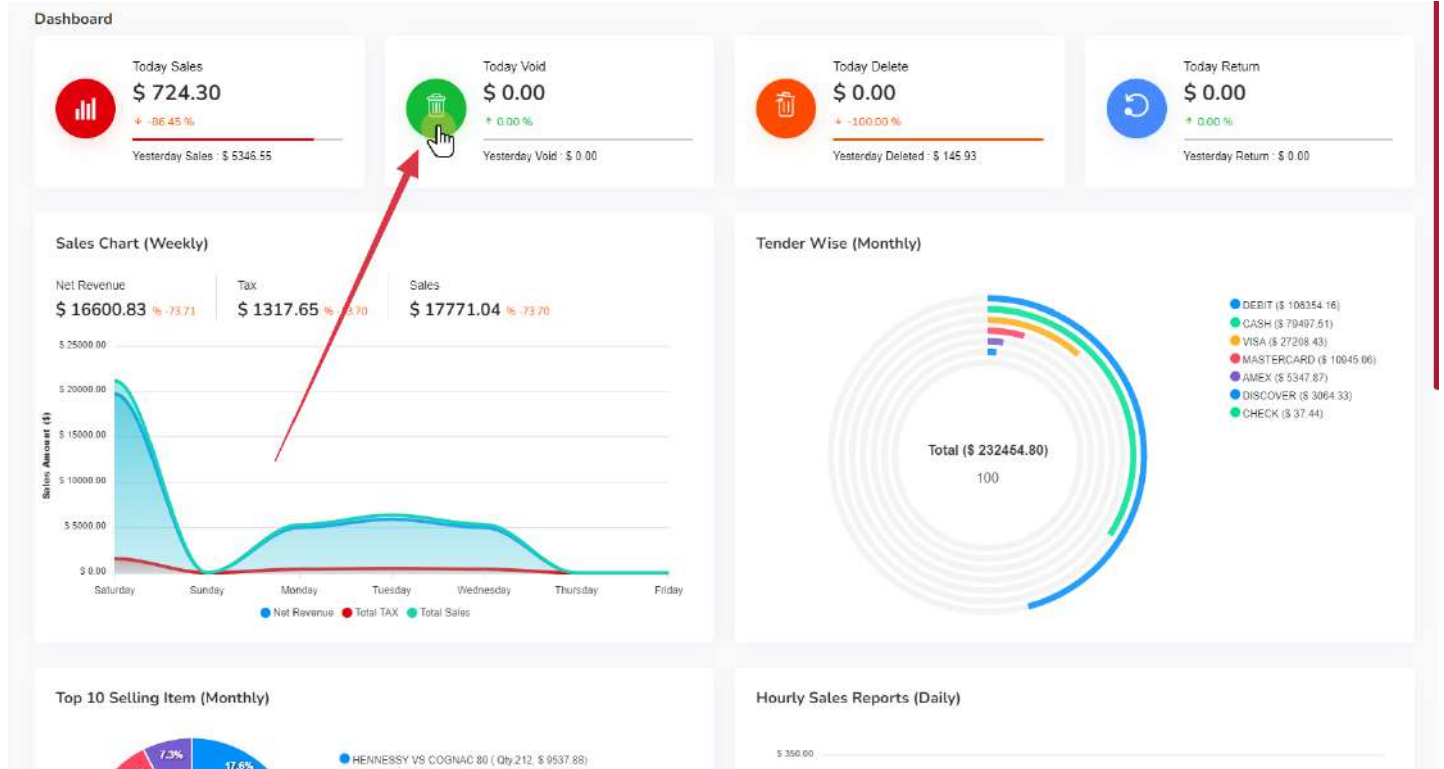
2.1 Back Office - Today Sales

Today's Sales will show you your live sales from that given day



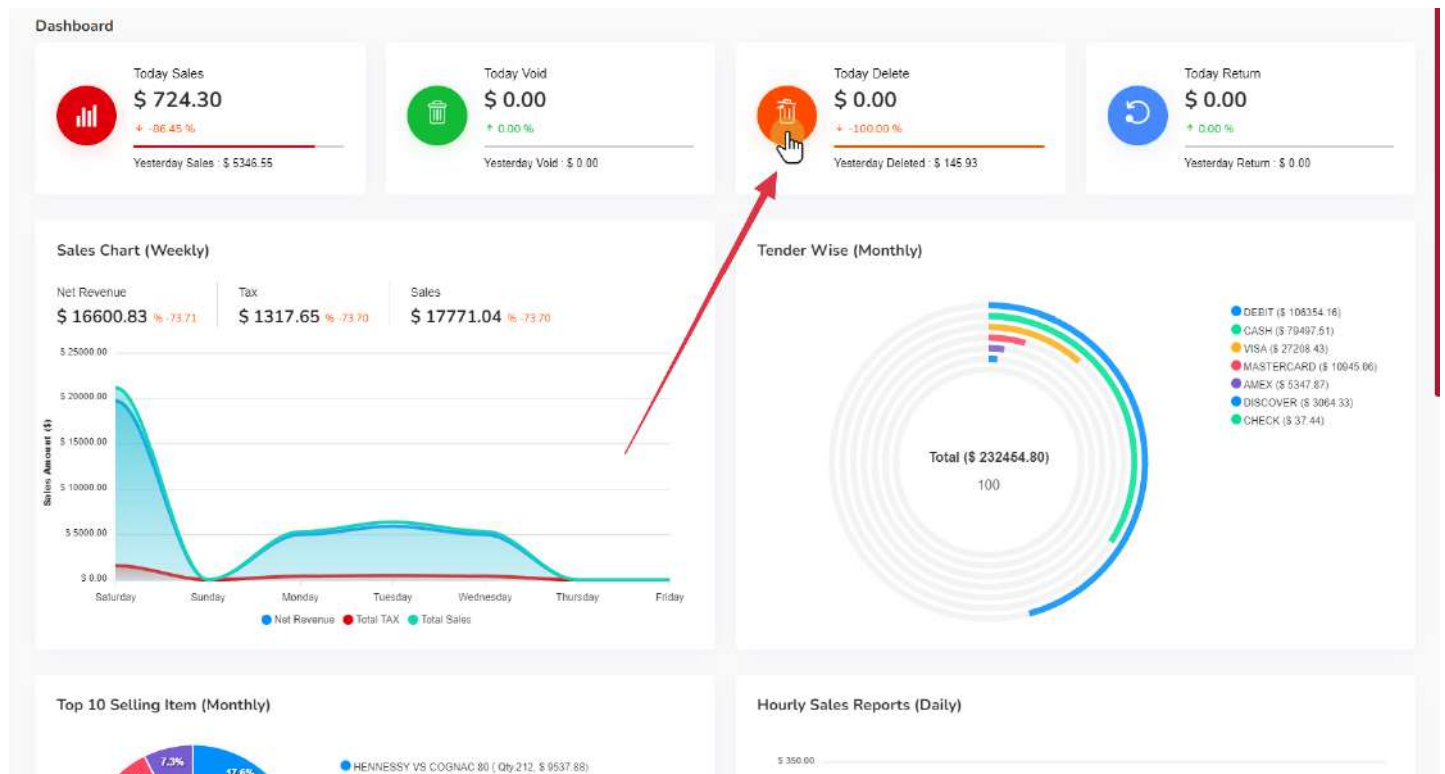
2.2 Back Office - Today Void

Total Void will show you how much merchandise in dollar amount was voided from transactions that given day



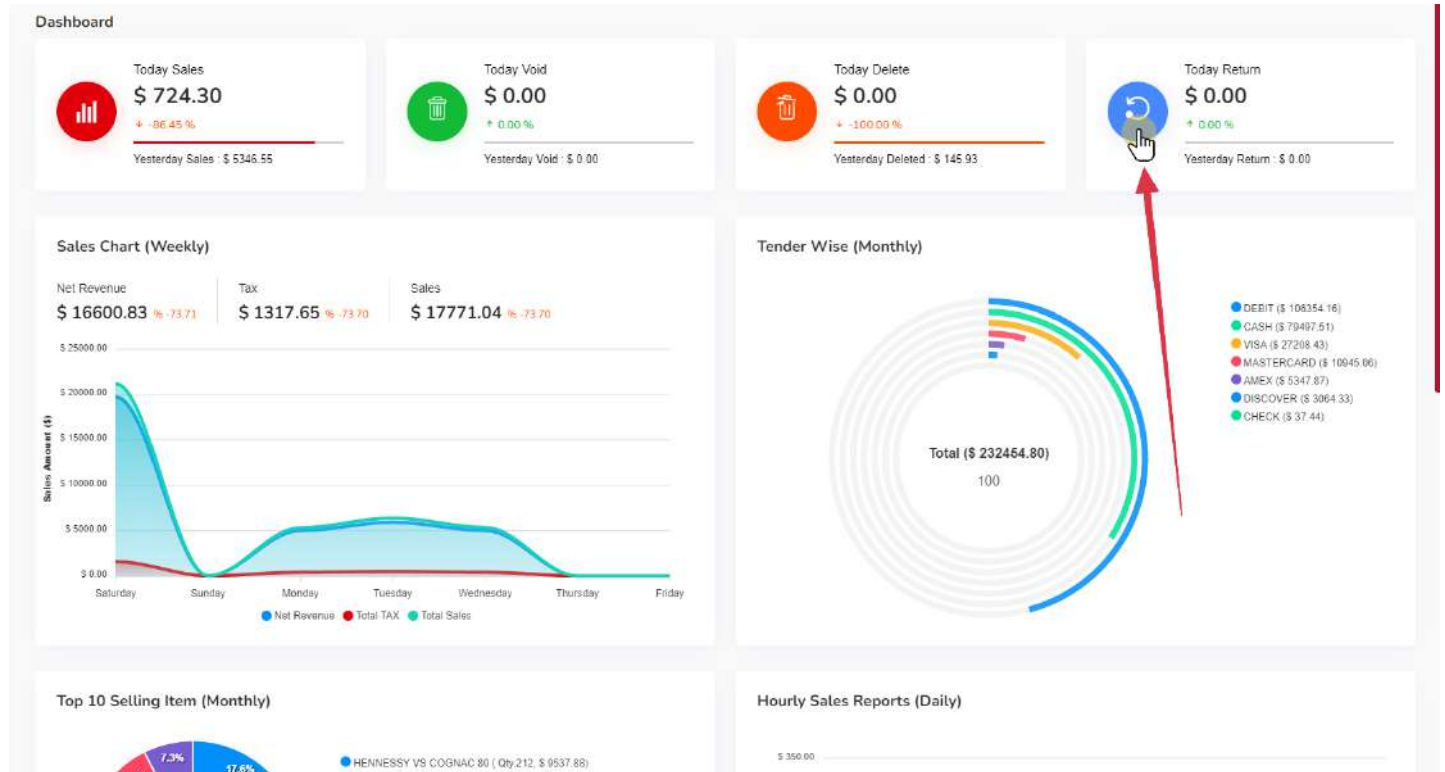
2.3 Back Office - Today Delete

Today Delete will show you how much merchandise in dollar amount was deleted from transactions that given day



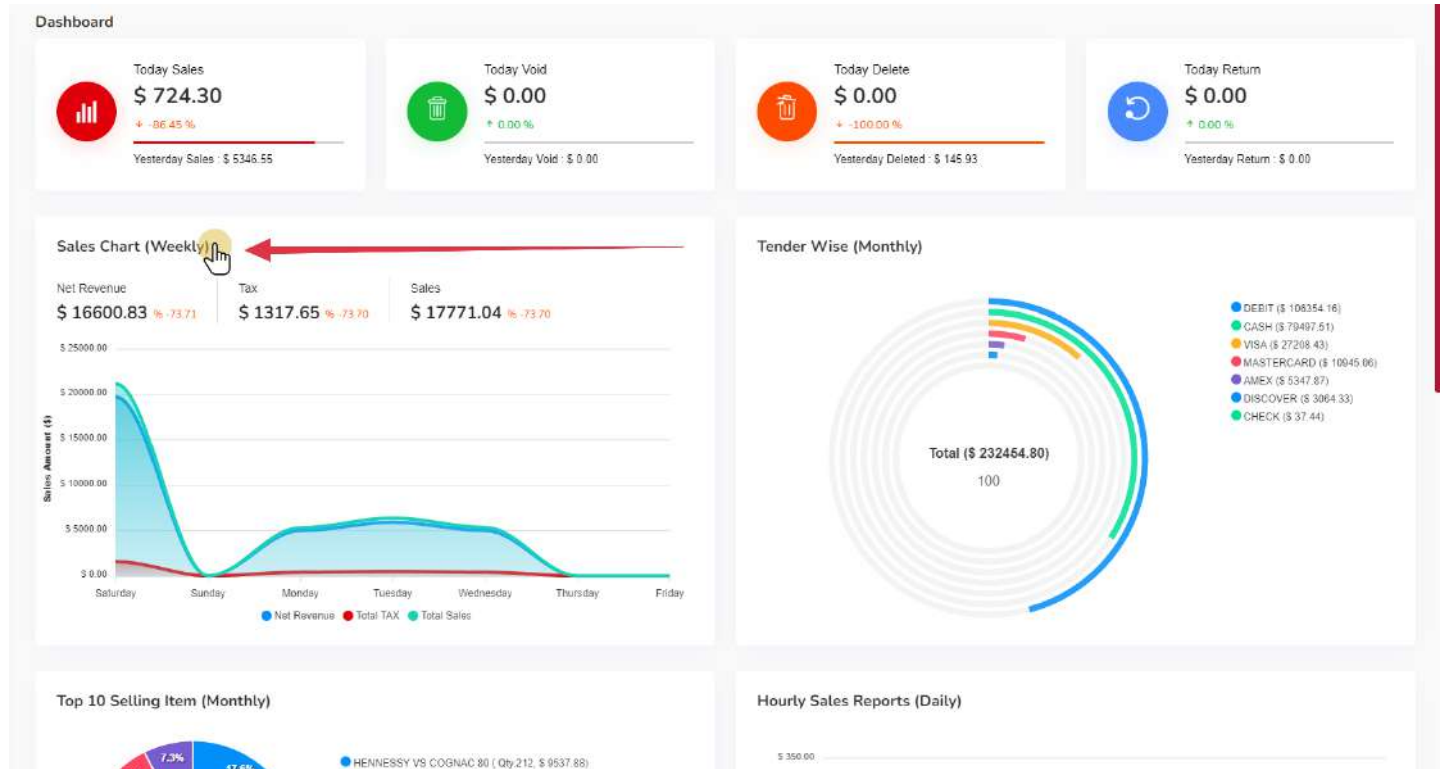
2.4 Back Office - Today Return

Today Return will show you how much merchandise in dollar amount was returned to your store



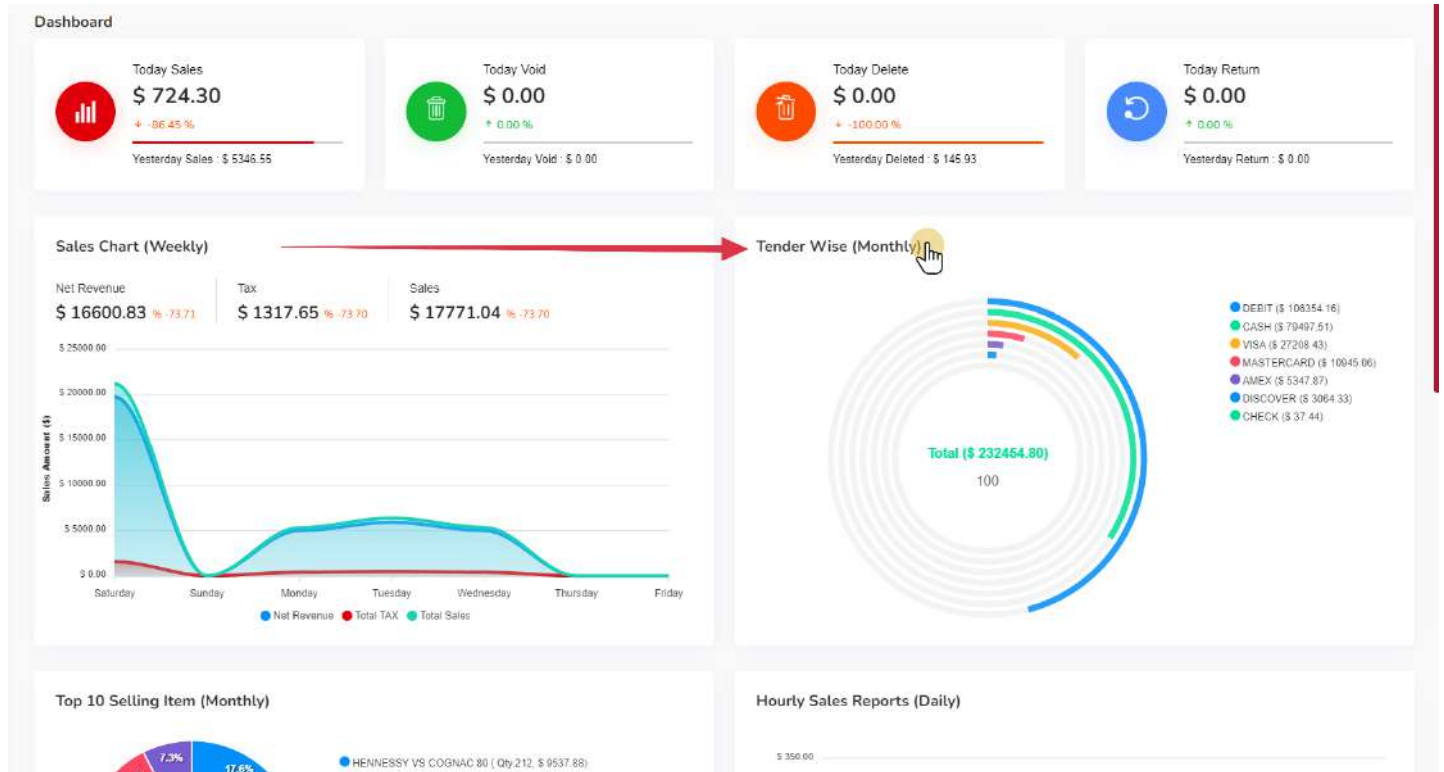
2.5 Back Office - Sales Chart (Weekly)

Sales Chart (Weekly) will track your weekly total sales



2.6 Back Office - Tender Wise (Monthly)

Tender Wise (Monthly) will track your sales sold by tender that month



2.7 Back Office - Top 10 Selling Items (Monthly)

Top 10 Selling Items (Monthly) will track your top 10 sold items that month



2.8 Back Office - Hourly Sales Reports (Daily)

Hourly Sales Reports (Daily) will track your hourly sales that day



2.9 Back Office - Sales Chart (Yearly)

Sales Chart (Yearly) will show you your total sales from each month



3 Back Office - Manage Employee

From the RetailzPOS **Back Office**, click **Manage Employees** to access employee roles and employee list

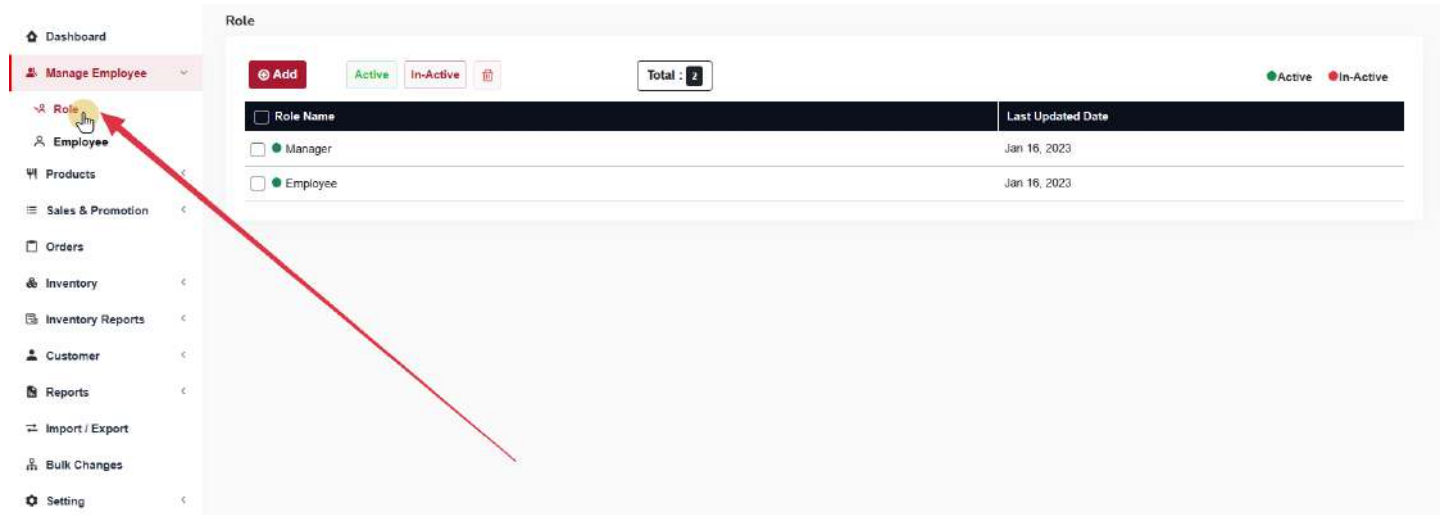
Role

Total : 2
Active In-Active

Role Name	Last Updated Date
<input type="checkbox"/> Manager	Jan 16, 2023
<input type="checkbox"/> Employee	Jan 16, 2023

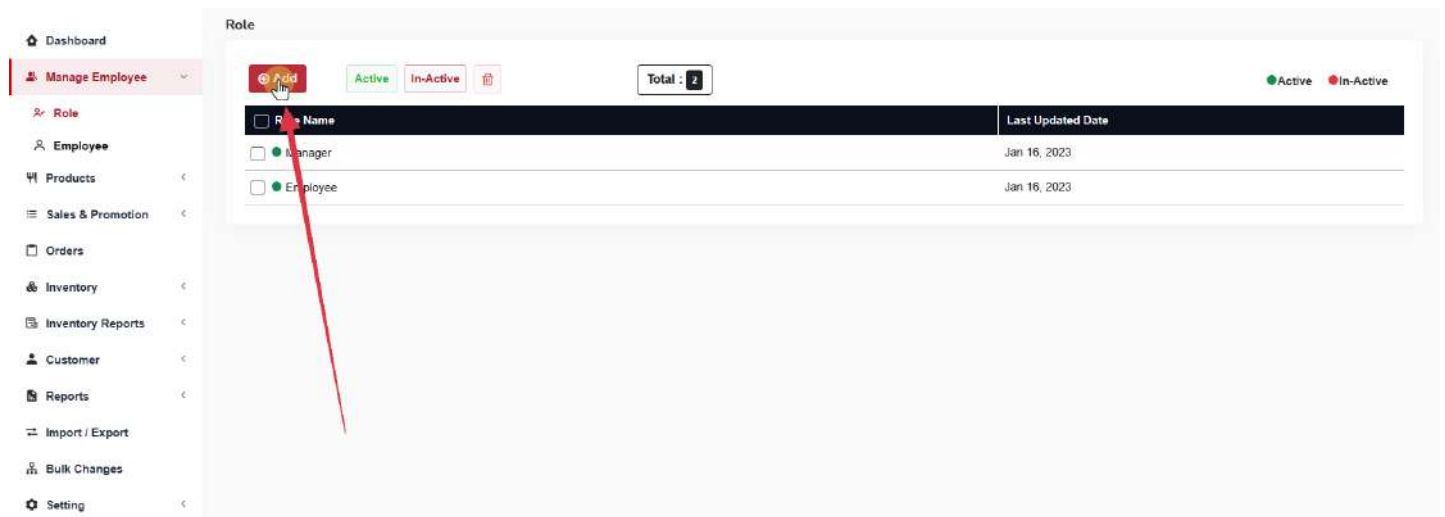
3.1 Back Office - Role Module

Under the Manage Employee Module, click **Role** to bring up your employee role list.



3.1.1 Back Office - Adding a Role

To create a new role, click **Add**.



3.1.2 Back Office - Role Name

When creating a new role, always begin with providing it with the appropriate **Role Name**.

The screenshot shows the 'Manage Employee' section with a sidebar menu. The 'Role' option is selected. The main area displays the 'CASH REGISTER' permissions. A red arrow points to the 'Role Name' input field at the top.

CASH REGISTER			
QUICK ACCESS			
<input checked="" type="checkbox"/> OVERRIDE ITEM TAX	<input checked="" type="checkbox"/> NO SALE	<input checked="" type="checkbox"/> PRICE LEVEL	
ACCESS CONTROL			
<input checked="" type="checkbox"/> DELETE ITEM	<input checked="" type="checkbox"/> VOID ITEMS	<input checked="" type="checkbox"/> SINGLE ITEM RETURN FOR (SINGLE / ALL)	<input checked="" type="checkbox"/> MULTI ITEM RETURN
OTHERS			
<input checked="" type="checkbox"/> RECEIPT / ALL RECEIPT	<input checked="" type="checkbox"/> PRICE-CHECK	<input checked="" type="checkbox"/> HOLD / RESUME TRANSACTION	<input checked="" type="checkbox"/> OVERRIDE CARD SETTLEMENT
<input checked="" type="checkbox"/> ALLOW SELLING PROMPT-PRICE ITEM	<input checked="" type="checkbox"/> OVERRIDE MANDATORY AGE CHECK	<input checked="" type="checkbox"/> DRAWER RECONCILIATION	<input checked="" type="checkbox"/> END SHIFT
<input checked="" type="checkbox"/> PRINT END SHIFT REPORT	<input checked="" type="checkbox"/> EDIT CUSTOMER CREDIT LIMIT	<input checked="" type="checkbox"/> ADJUST REWARD POINT AND CREDIT	<input checked="" type="checkbox"/> COMMIT INVENTORY
<input checked="" type="checkbox"/> MULTI ITEM CHANGE			
DISCOUNT			
<input checked="" type="checkbox"/> CUSTOM DISCOUNT	<input checked="" type="checkbox"/> STANDARD DISCOUNT	<input checked="" type="checkbox"/> MULTI ITEM DISCOUNT	

3.1.3 Back Office - Role Permissions

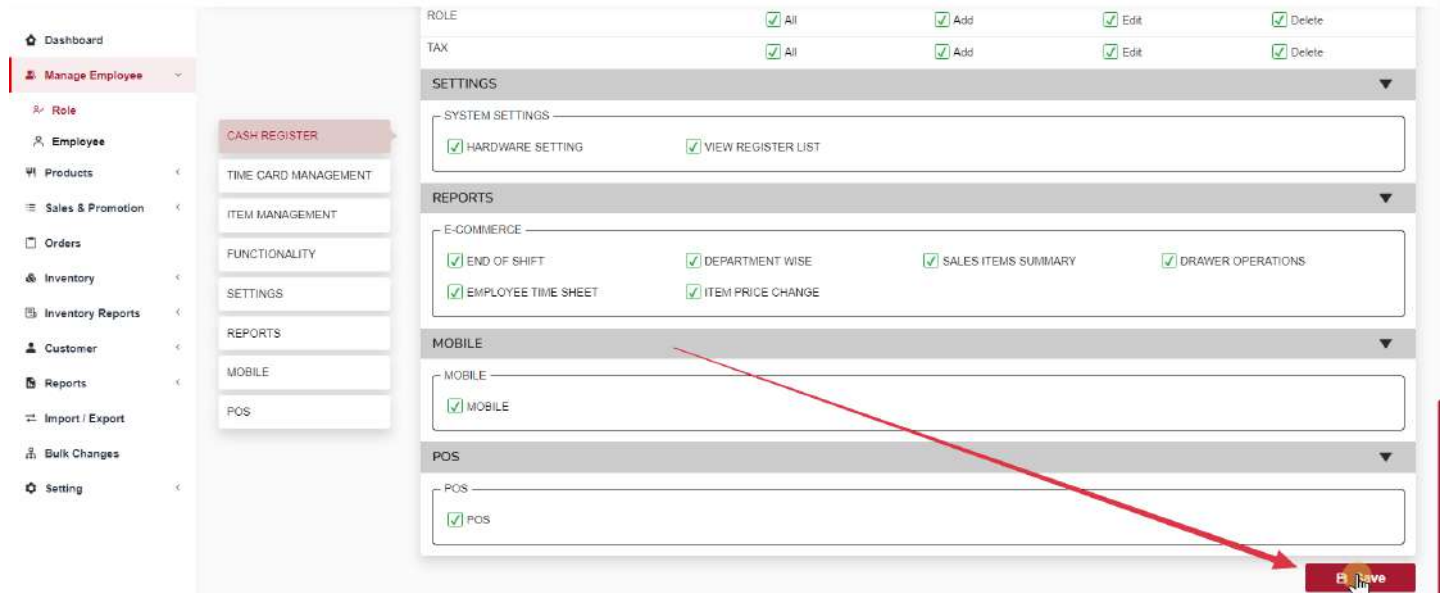
- When editing roles you will have the ability to grant permissions to each role created.
- To **grant permissions**, click on each function as needed.
- A function will be **enabled** when the **check mark is green** and **disabled** when the **red X** is showing.

The screenshot shows the 'Manage Employee' section with a sidebar menu. The 'Role' option is selected. The main area displays the 'CASH REGISTER' permissions. A red arrow points to the 'OVERRIDE ITEM TAX' checkbox, which is now checked with a green checkmark.

CASH REGISTER			
QUICK ACCESS			
<input checked="" type="checkbox"/> OVERRIDE ITEM TAX	<input checked="" type="checkbox"/> NO SALE	<input checked="" type="checkbox"/> PRICE LEVEL	
ACCESS CONTROL			
<input checked="" type="checkbox"/> DELETE ITEM	<input checked="" type="checkbox"/> VOID ITEMS	<input checked="" type="checkbox"/> SINGLE ITEM RETURN FOR (SINGLE / ALL)	<input checked="" type="checkbox"/> MULTI ITEM RETURN
OTHERS			
<input checked="" type="checkbox"/> RECEIPT / ALL RECEIPT	<input checked="" type="checkbox"/> PRICE-CHECK	<input checked="" type="checkbox"/> HOLD / RESUME TRANSACTION	<input checked="" type="checkbox"/> OVERRIDE CARD SETTLEMENT
<input checked="" type="checkbox"/> ALLOW SELLING PROMPT-PRICE ITEM	<input checked="" type="checkbox"/> OVERRIDE MANDATORY AGE CHECK	<input checked="" type="checkbox"/> DRAWER RECONCILIATION	<input checked="" type="checkbox"/> END SHIFT
<input checked="" type="checkbox"/> PRINT END SHIFT REPORT	<input checked="" type="checkbox"/> EDIT CUSTOMER CREDIT LIMIT	<input checked="" type="checkbox"/> ADJUST REWARD POINT AND CREDIT	<input checked="" type="checkbox"/> COMMIT INVENTORY
<input checked="" type="checkbox"/> MULTI ITEM CHANGE			
DISCOUNT			
<input checked="" type="checkbox"/> CUSTOM DISCOUNT	<input checked="" type="checkbox"/> STANDARD DISCOUNT	<input checked="" type="checkbox"/> MULTI ITEM DISCOUNT	

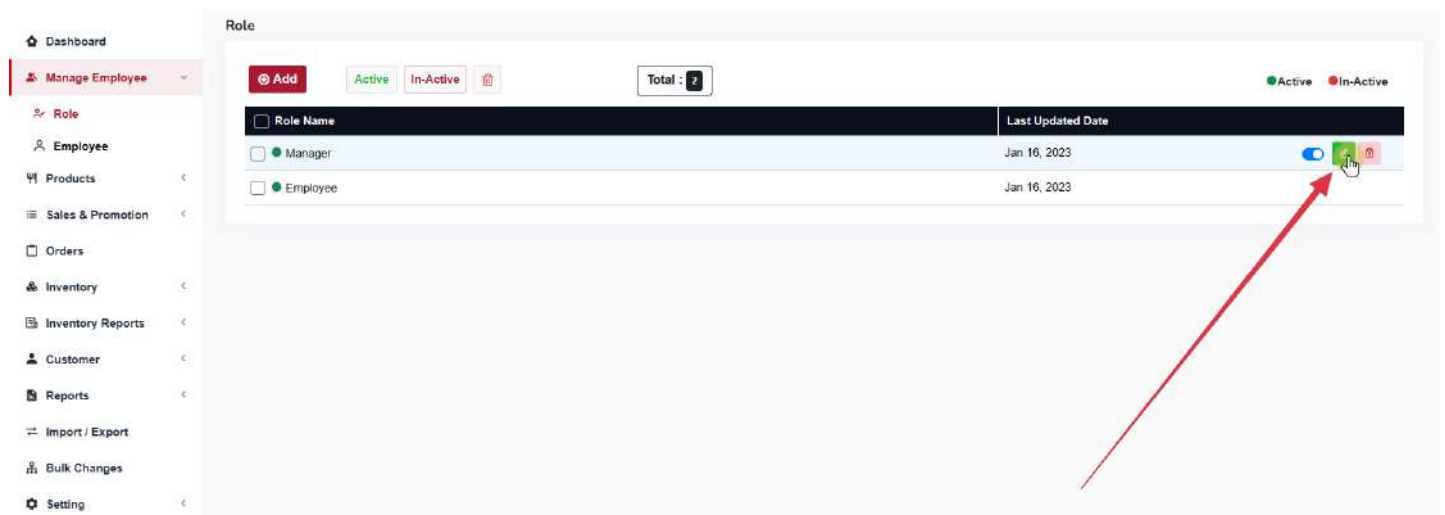
3.1.4 Back Office - Save Role

When adding or editing a role, always make sure to click **Save**.



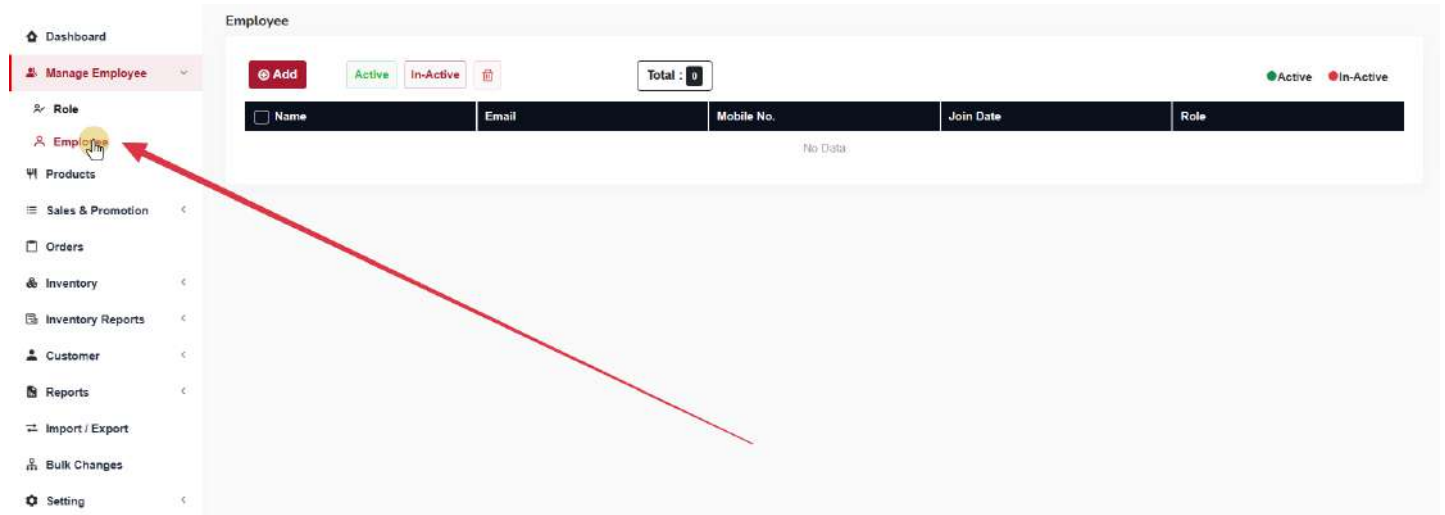
3.1.5 Back Office - Edit Roles

To edit an existing role, hover over the role and select the **green** edit button



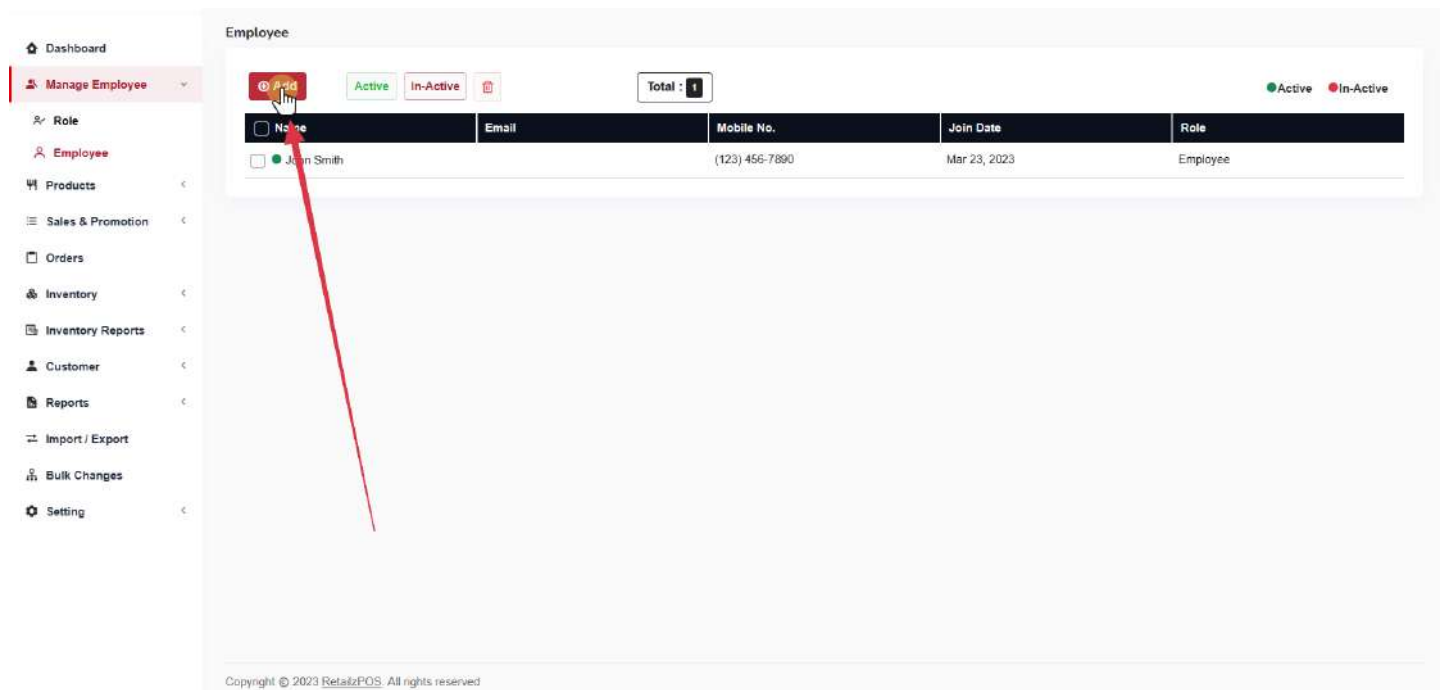
3.2 Back Office - Employee List

Under the Manage Employee Module, click **Employee** to bring up your employee list.



3.2.1 Back Office - Adding an Employee

To create a new employee, click **Add**.



3.2.2 Back Office - Employee Information

- When creating a new employee, always make sure to fill out all the boxes with a **red star** next to them.
- Always make sure to select what **role** the employee will have
- Make sure to give each employee **their own pin and password**

Add Employee

Personal Details

First Name * John Last Name * Smith Email

Home Contact No Mobile No * (123) 456-7890 Birth Date Select Gender

Location Details

Address 1 Address 2

Zip Code City State Select Country

Others

Access Pin * 1234 Re-Enter Access Pin * 1234 Join Date * Mar 24, 2023 Payroll Amount (\$)

Select Role * Employee Select Payroll Type Select Language

☐ Allow POS ☐ Allow MOBILE ☐ Allow Web

Password Details

Password * Password *

Save

3.2.3 Back Office - Save Employee Information

When adding or editing an employee, always make sure to click **Save**.

Add Employee

Personal Details

First Name * John Last Name * Smith Email *

Home Contact No * Mobile No * (123) 456-7890 Birth Date * Select Gender *

Location Details

Address 1 * Address 2 *

Zip Code * City * State * Select Country *

Others

Access Pin * 1234 Re-Enter Access Pin * 1234 Join Date * Mar 24, 2023 Payroll Amount (\$) *

Select Role * Employee x Select Payroll Type * Select Language *

☐ Allow POS ☐ Allow MOBILE ☐ Allow Web

Password Details

Password * Re-Enter Password *

Save

3.2.4 Back Office - Edit Employee

Employee

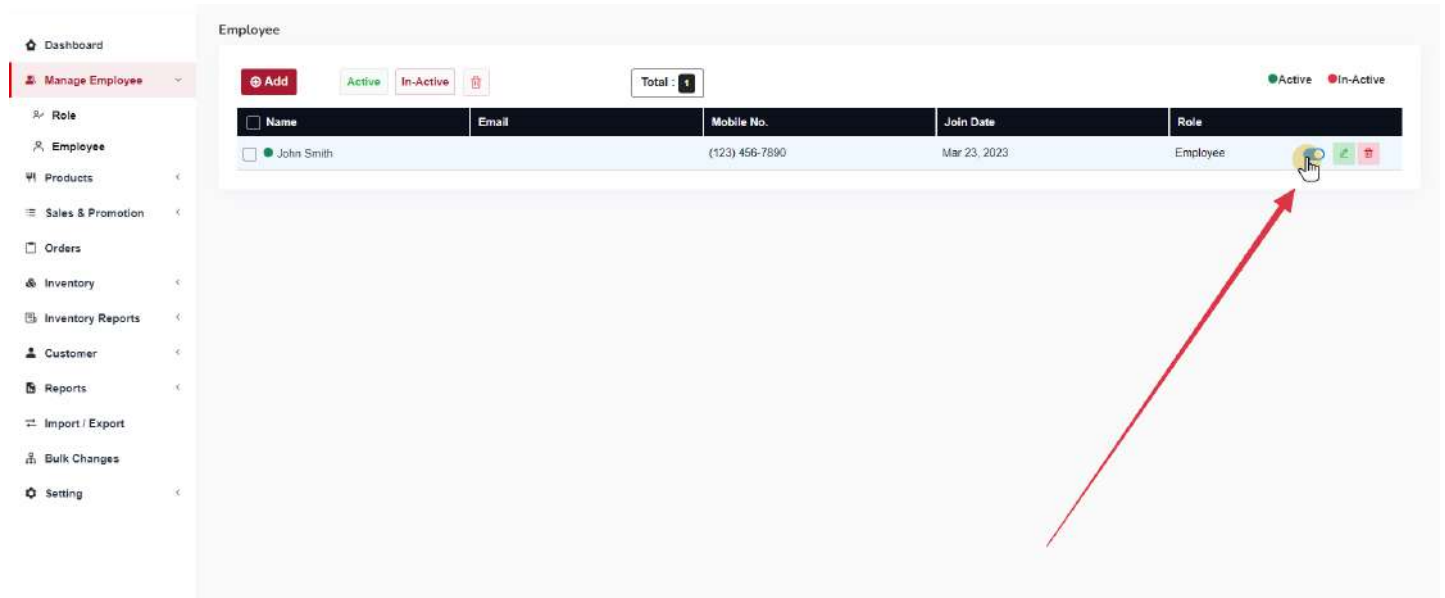
Add **Active** **In-Active** **Total : 1** **Active** **In-Active**

Name	Email	Mobile No.	Join Date	Role
<input type="checkbox"/> John Smith		{123} 456-7890	Mar 23, 2023	Employee

Active **In-Active**

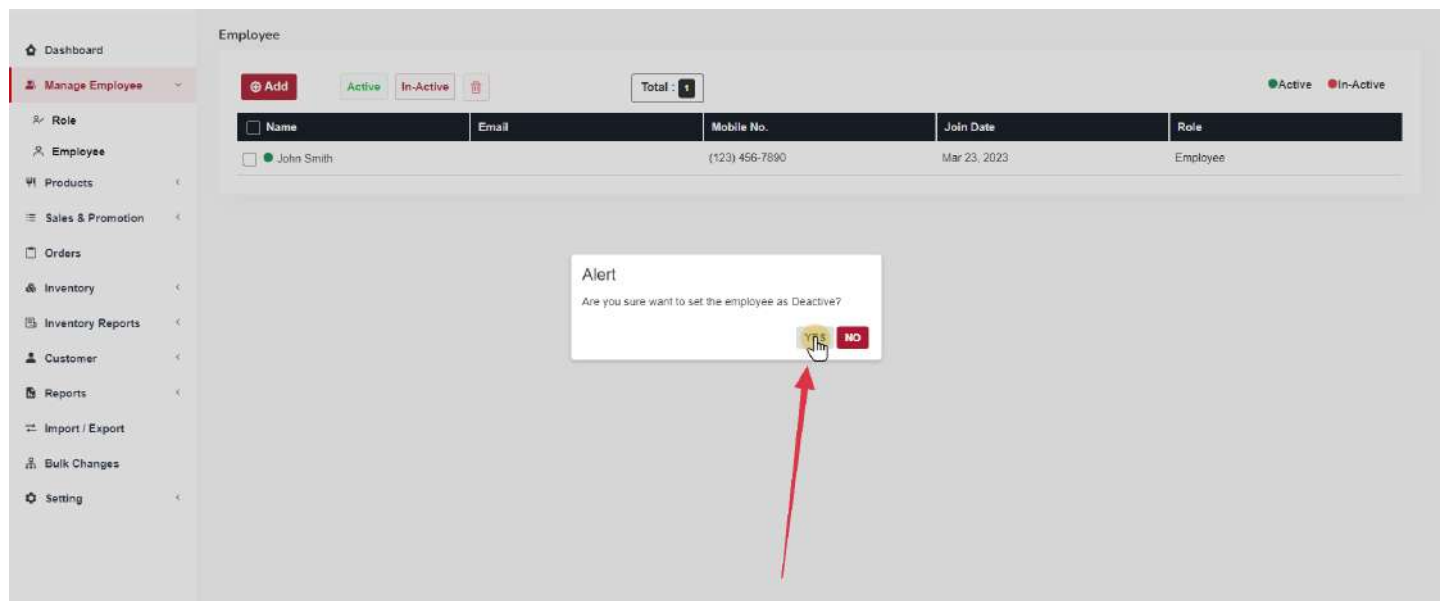
3.2.5 Back Office - Deactivate an Employee

To **deactivate** an employee, hover over the employee and click the **slider**



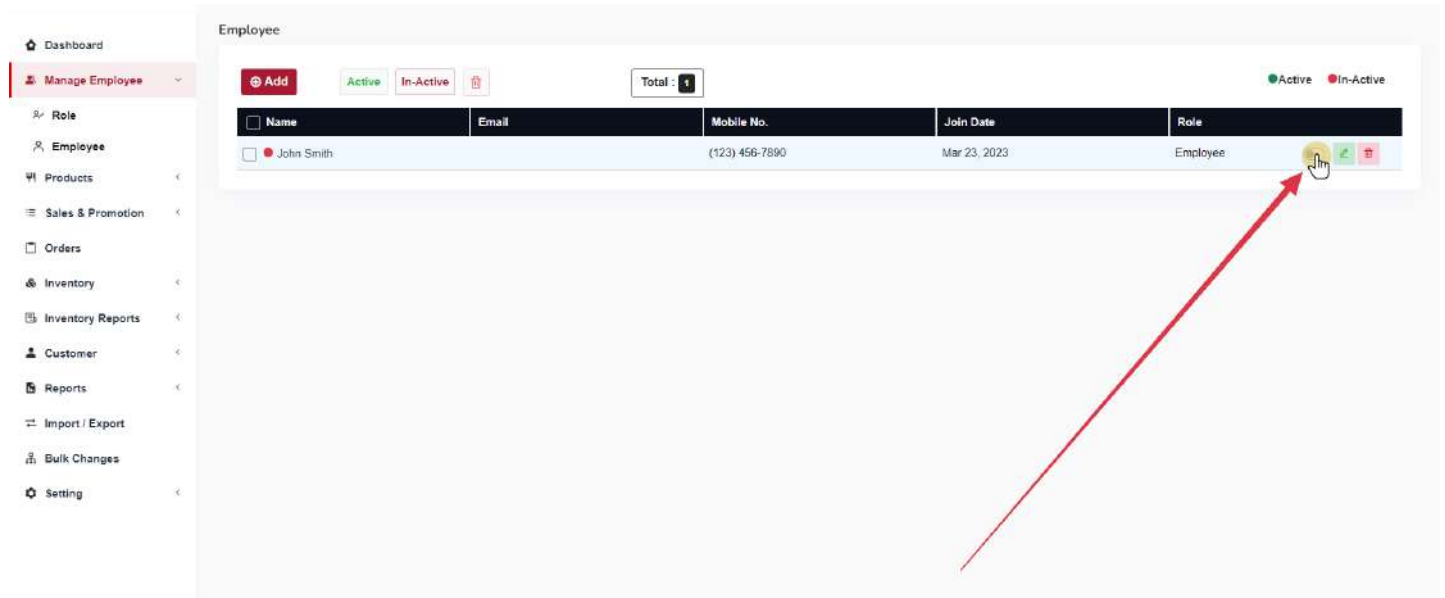
3.2.6 Back Office - Deactivate Employee Confirmation

To confirm employee deactivation, click **YES**



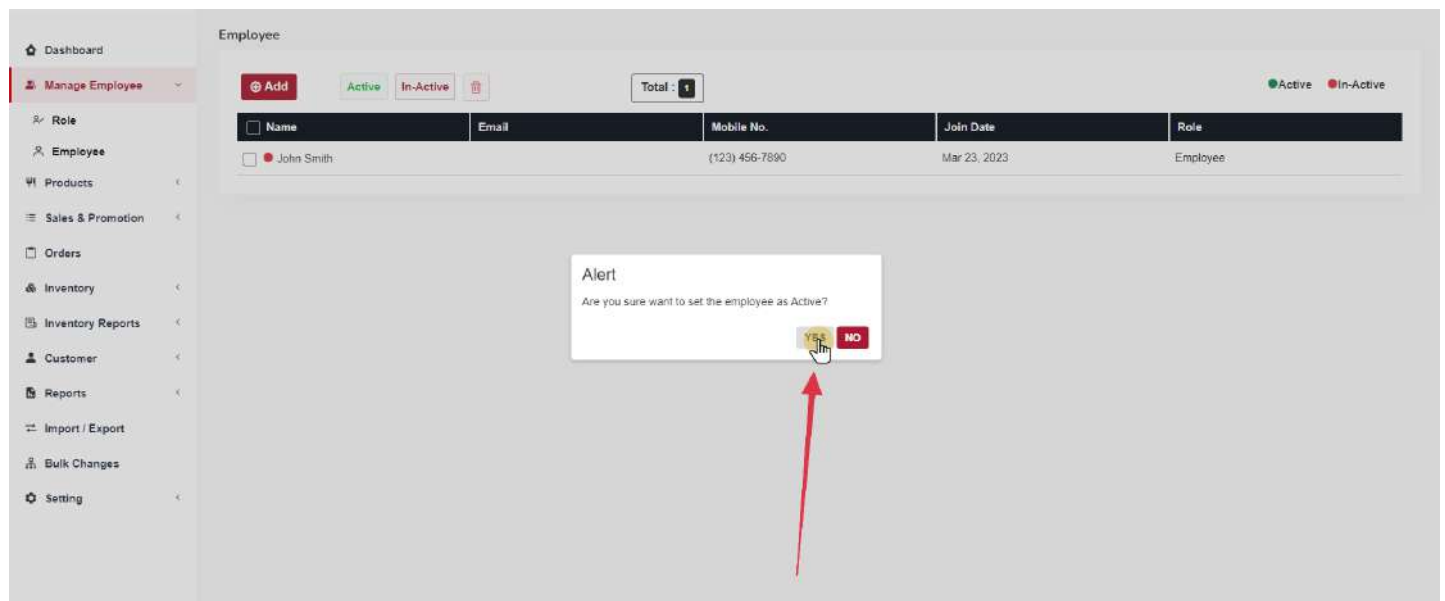
3.2.7 Back Office - Activate an Employee

To **Activate** an employee, hover over the employee and click the **slider**



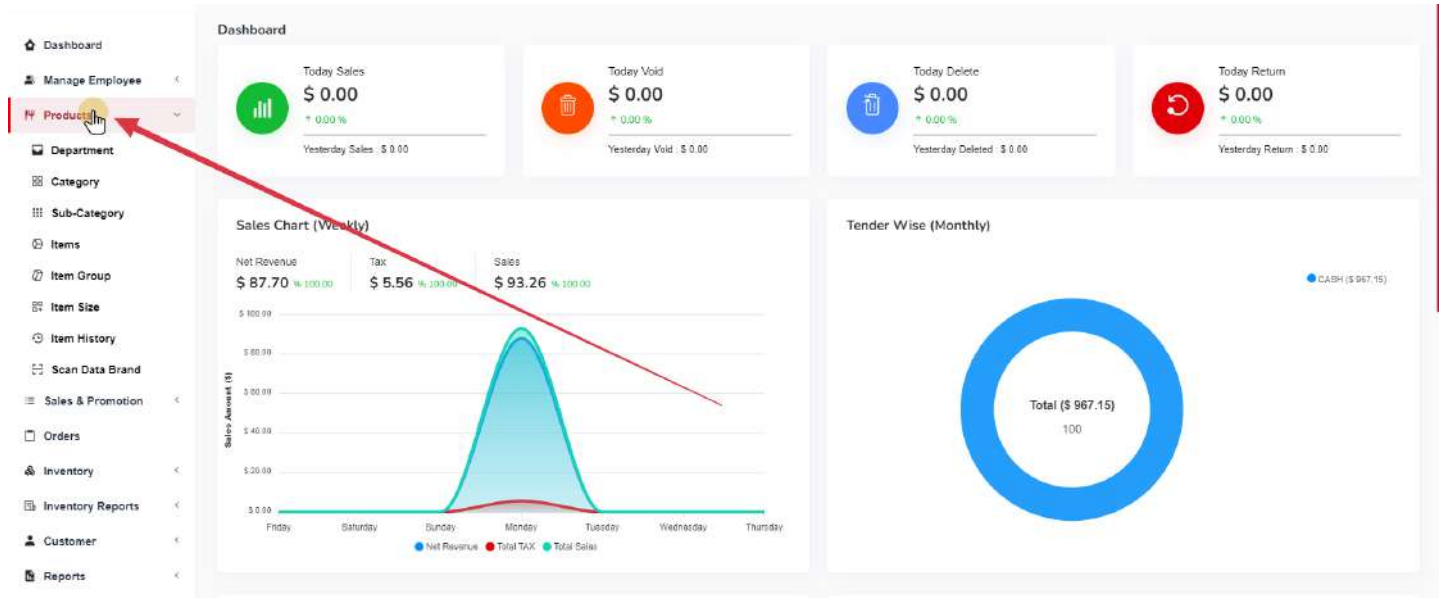
3.2.8 Back Office - Activate Employee Confirmation

To confirm employee activation, click **YES**



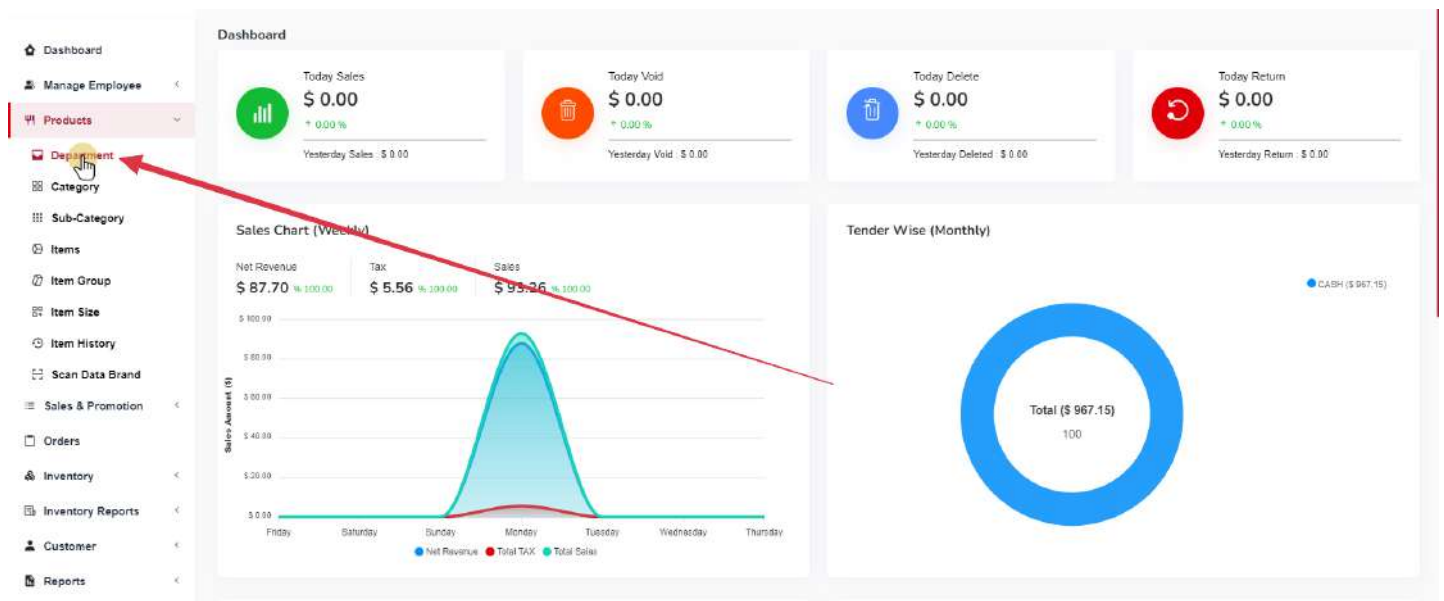
4 Back Office - Products

From the RetailzPOS **Back Office**, click **Products** to access your store product module



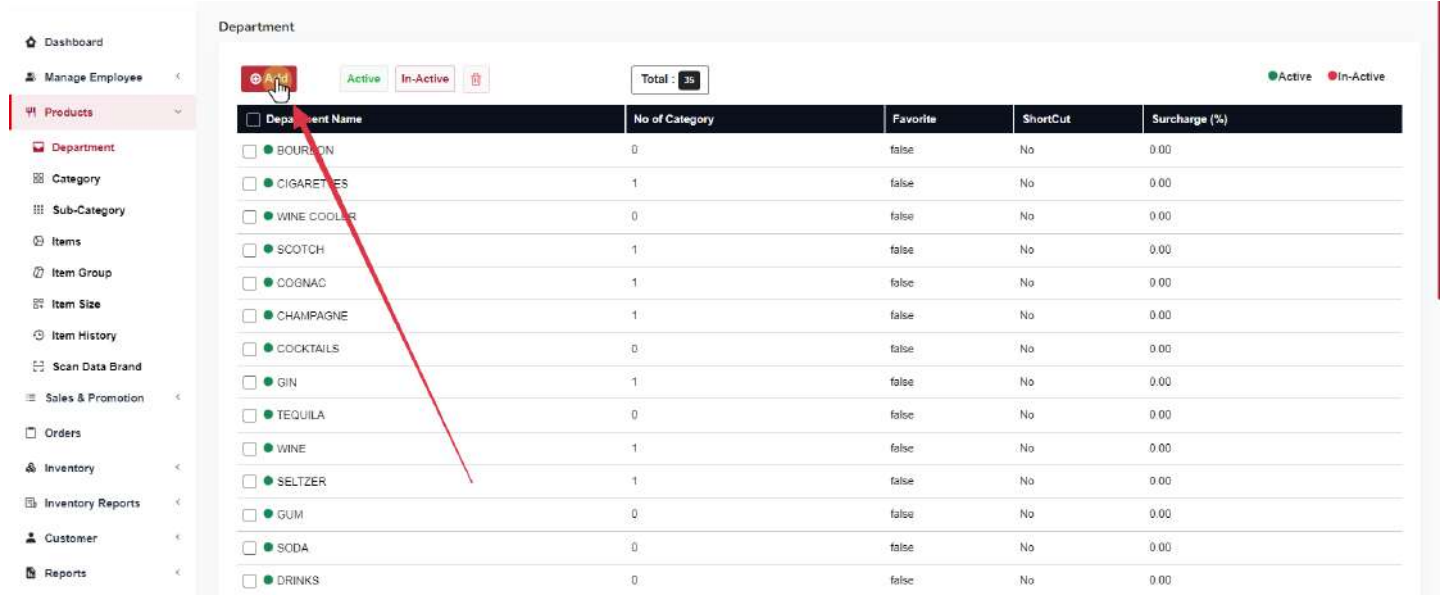
4.1 Back Office - Department

Under the Product Module, click on **Department** to bring up your stores department list



4.1.1 Back Office - Add a Department

To create a new department, click **Add**

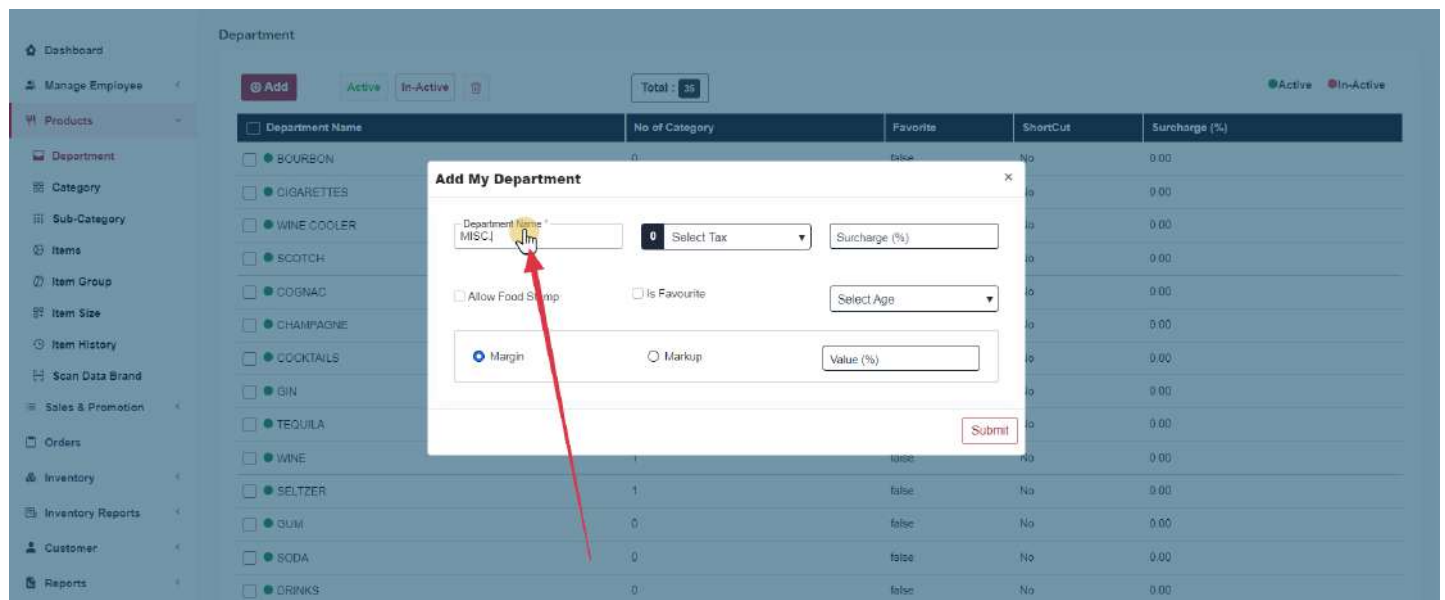


The screenshot shows the 'Department' management page. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, and Reports. The main area displays a table of departments with columns: Department Name, No of Category, Favorite, ShortCut, and Surcharge (%). A red arrow points to the 'Add' button at the top left of the table.

Department Name	No of Category	Favorite	ShortCut	Surcharge (%)
<input type="checkbox"/> BOURBON	0	false	No	0.00
<input type="checkbox"/> CIGARETTES	1	false	No	0.00
<input type="checkbox"/> WINE COOLER	0	false	No	0.00
<input type="checkbox"/> SCOTCH	1	false	No	0.00
<input type="checkbox"/> COGNAC	1	false	No	0.00
<input type="checkbox"/> CHAMPAGNE	1	false	No	0.00
<input type="checkbox"/> COCKTAILS	0	false	No	0.00
<input type="checkbox"/> GIN	1	false	No	0.00
<input type="checkbox"/> TEQUILA	0	false	No	0.00
<input type="checkbox"/> WINE	1	false	No	0.00
<input type="checkbox"/> SELTZER	1	false	No	0.00
<input type="checkbox"/> GUM	0	false	No	0.00
<input type="checkbox"/> SODA	0	false	No	0.00
<input type="checkbox"/> DRINKS	0	false	No	0.00

4.1.2 Back Office - Department Name

When creating a new department, always begin with providing it with the appropriate **Name**

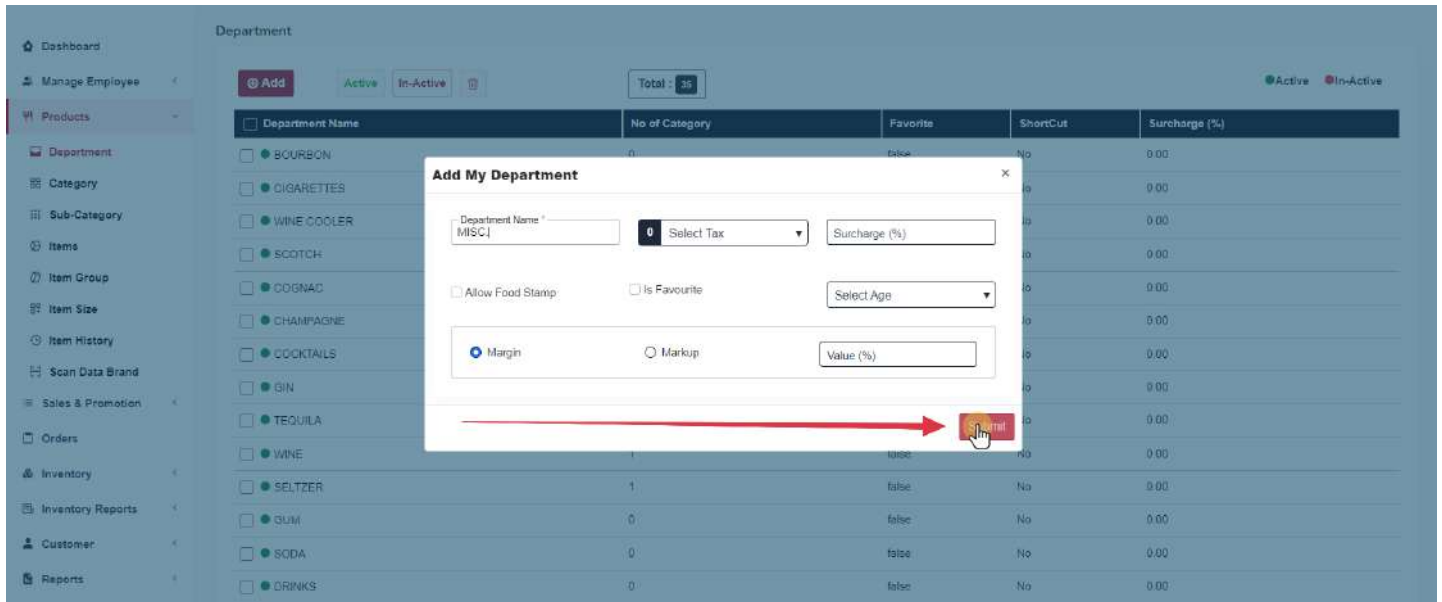


The screenshot shows the 'Add My Department' modal dialog box. It contains the following fields and options:

- Department Name:** A text input field with 'MISC' entered. A red arrow points to this field.
- Select Tax:** A dropdown menu showing '0'.
- Surcharge (%):** A text input field.
- Allow Food Stamp:** A checkbox.
- Is Favourite:** A checkbox.
- Select Age:** A dropdown menu.
- Margin:** A radio button (selected).
- Markup:** A radio button.
- Value (%):** A text input field.
- Submit:** A button at the bottom right.

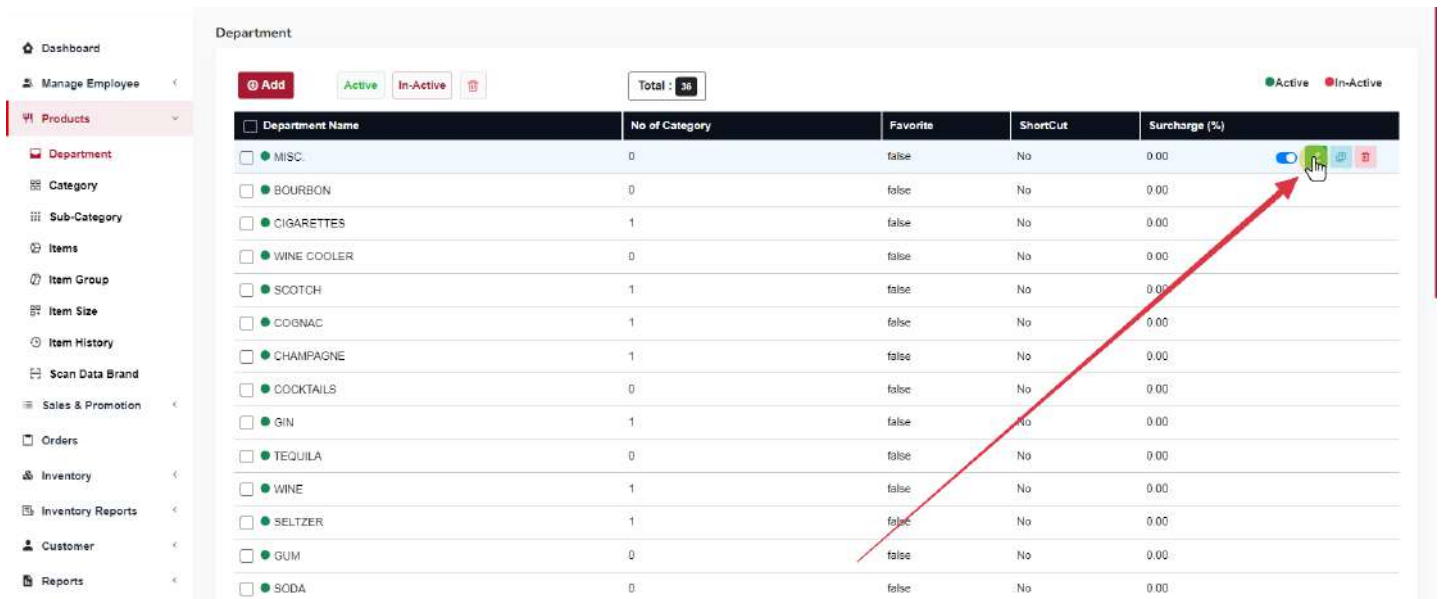
4.1.3 Back Office - Save Department

To confirm the new department, click **Submit**



4.1.4 Back Office - Edit Department

To edit an existing department, hover over the department and select the **green** edit button



4.1.5 Back Office - Create Department Shortcut

To create a department shortcut, hover over the department and click on the **blue** shortcut icon.

The screenshot shows the 'Department' management page. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, and Reports. The main area displays a table of departments. At the top, there are buttons for 'Add', 'Active', 'In-Active', and a 'Total: 36' indicator. The table has columns: Department Name, No of Category, Favorite, ShortCut, and Surcharge (%). A red arrow points to the blue shortcut icon in the 'ShortCut' column for the 'MISC.' department.

Department Name	No of Category	Favorite	ShortCut	Surcharge (%)
MISC.	0	false	No	0.00
BOURBON	0	false	No	0.00
CIGARETTES	1	false	No	0.00
WINE COOLER	0	false	No	0.00
SCOTCH	1	false	No	0.00
COGNAC	1	false	No	0.00
CHAMPAGNE	1	false	No	0.00
COCKTAILS	0	false	No	0.00
GIN	1	false	No	0.00
TEQUILA	0	false	No	0.00
WINE	1	false	No	0.00
SELTZER	1	false	No	0.00
GUM	0	false	No	0.00
SODA	0	false	No	0.00

4.1.6 Back Office - Department Shortcut Confirmation

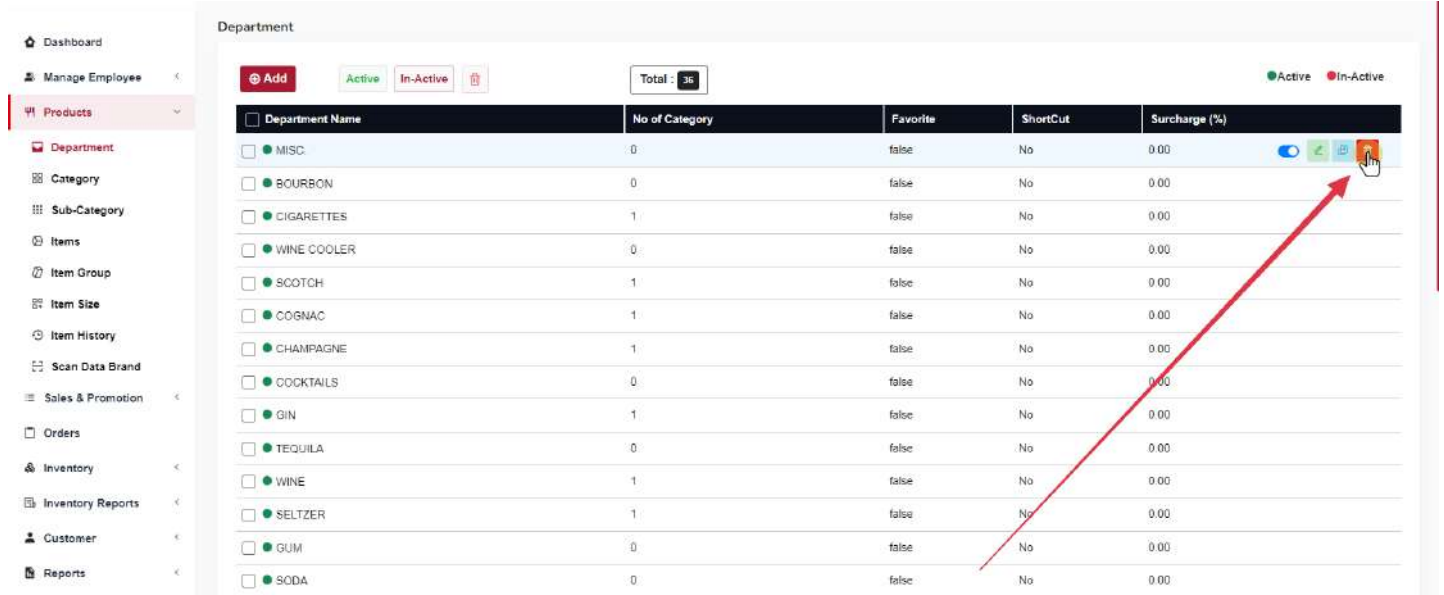
To confirm the department shortcut, click **YES**

The screenshot shows the same 'Department' management page, but with an alert dialog box overlaid. The dialog box contains the text: 'Alert' and 'Are you sure you want to create a department shortcut with this "MISC." department?'. There are two buttons: 'YES' (highlighted with a red arrow) and 'NO'.

Department Name	No of Category	Favorite	ShortCut	Surcharge (%)
MISC.	0	false	No	0.00
BOURBON	0	false	No	0.00
CIGARETTES	1	false	No	0.00
WINE COOLER	0	false	No	0.00
SCOTCH	1	false	No	0.00
COGNAC	1	false	No	0.00
CHAMPAGNE	1	false	No	0.00
COCKTAILS	0	false	No	0.00
GIN	1	false	No	0.00
TEQUILA	0	false	No	0.00
WINE	1	false	No	0.00
SELTZER	1	false	No	0.00
GUM	0	false	No	0.00
SODA	0	false	No	0.00

4.1.7 Back Office - Delete a Department

To delete a department, hover over the department and click the **red** trash can button

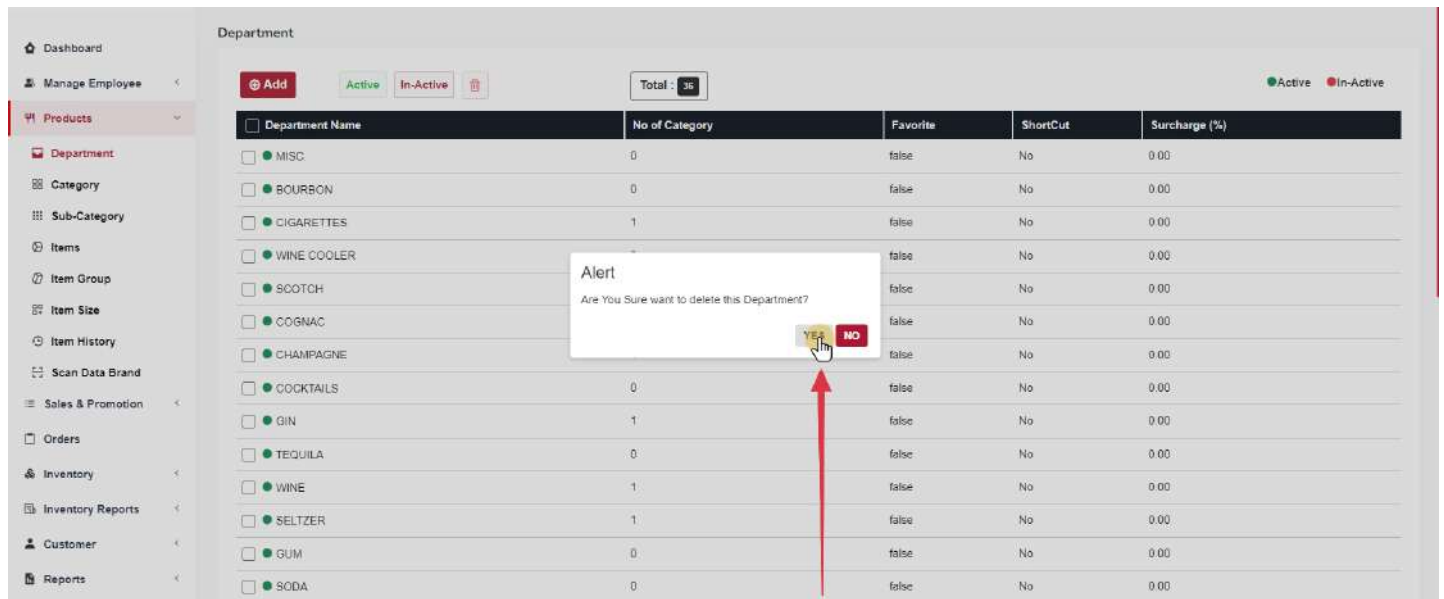


The screenshot shows the 'Department' management interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, and Reports. The main area displays a table of departments. At the top, there are filters for 'Add', 'Active', 'In-Active', and a 'Total: 36' count. The table has columns: Department Name, No of Category, Favorite, ShortCut, and Surcharge (%). A red arrow points to the red trash can icon in the action column for the 'MISC' department.

Department Name	No of Category	Favorite	ShortCut	Surcharge (%)
MISC	0	false	No	0.00
BOURBON	0	false	No	0.00
CIGARETTES	1	false	No	0.00
WINE COOLER	0	false	No	0.00
SCOTCH	1	false	No	0.00
COGNAC	1	false	No	0.00
CHAMPAGNE	1	false	No	0.00
COCKTAILS	0	false	No	0.00
GIN	1	false	No	0.00
TEQUILA	0	false	No	0.00
WINE	1	false	No	0.00
SELTZER	1	false	No	0.00
GUM	0	false	No	0.00
SODA	0	false	No	0.00

4.1.8 Back Office - Confirm Delete Department

To confirm you would like to delete a department, click **YES**



The screenshot shows the same 'Department' management interface as before, but with a confirmation alert dialog displayed in the center. The dialog has the title 'Alert' and the message 'Are You Sure want to delete this Department?'. It contains two buttons: 'YES' (highlighted with a red arrow) and 'NO'.

Department Name	No of Category	Favorite	ShortCut	Surcharge (%)
MISC	0	false	No	0.00
BOURBON	0	false	No	0.00
CIGARETTES	1	false	No	0.00
WINE COOLER	0	false	No	0.00
SCOTCH	1	false	No	0.00
COGNAC	1	false	No	0.00
CHAMPAGNE	1	false	No	0.00
COCKTAILS	0	false	No	0.00
GIN	1	false	No	0.00
TEQUILA	0	false	No	0.00
WINE	1	false	No	0.00
SELTZER	1	false	No	0.00
GUM	0	false	No	0.00
SODA	0	false	No	0.00

4.2 Back Office - Category

Under the Product Module, click on **Category** to bring up your stores category list

Category

Add Active In-Active Total : 30 Active In-Active

Category Name	Department Name	No of Sub-Category
<input type="checkbox"/> CIGARETTE	CIGARETTES	0
<input type="checkbox"/> SCOTCH	SCOTCH	0
<input type="checkbox"/> COGNAC	COGNAC	0
<input type="checkbox"/> CHAMPAGNE	CHAMPAGNE	0
<input type="checkbox"/> GIN	GIN	0
<input type="checkbox"/> WINE	WINE	0
<input type="checkbox"/> SELTZER	SELTZER	0
<input type="checkbox"/> GROCERY	GROCERY NEW	0
<input type="checkbox"/> BEER	Beer	0
<input type="checkbox"/> MINI	MINI	0
<input type="checkbox"/> LIQUOR	RUM	0
<input type="checkbox"/> GUM-CANDY-BAR	CANDY	0
<input type="checkbox"/> TOBACCO	Tobacco	0
<input type="checkbox"/> MIXER	MIXERS	0
<input type="checkbox"/> DRINKS	CANADADRY	0

portal.etailpos.com/Pos/Categories

4.2.1 Back Office - Add a Category

To create a new category, click **Add**

Category

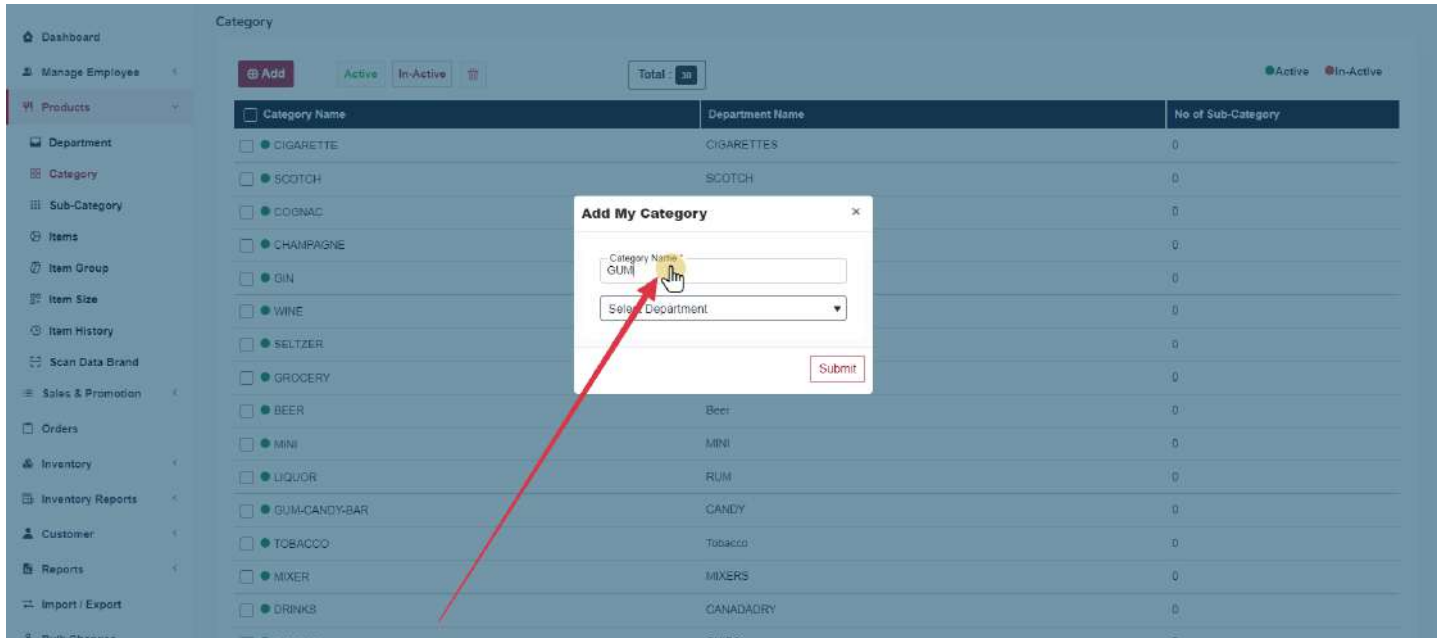
Add Active In-Active Total : 30 Active In-Active

Category Name	Department Name	No of Sub-Category
<input type="checkbox"/> CIGARETTE	CIGARETTES	0
<input type="checkbox"/> SCOTCH	SCOTCH	0
<input type="checkbox"/> COGNAC	COGNAC	0
<input type="checkbox"/> CHAMPAGNE	CHAMPAGNE	0
<input type="checkbox"/> GIN	GIN	0
<input type="checkbox"/> WINE	WINE	0
<input type="checkbox"/> SELTZER	SELTZER	0
<input type="checkbox"/> GROCERY	GROCERY NEW	0
<input type="checkbox"/> BEER	Beer	0
<input type="checkbox"/> MINI	MINI	0
<input type="checkbox"/> LIQUOR	RUM	0
<input type="checkbox"/> GUM-CANDY-BAR	CANDY	0
<input type="checkbox"/> TOBACCO	Tobacco	0
<input type="checkbox"/> MIXER	MIXERS	0
<input type="checkbox"/> DRINKS	CANADADRY	0

portal.etailpos.com/Pos/Categories

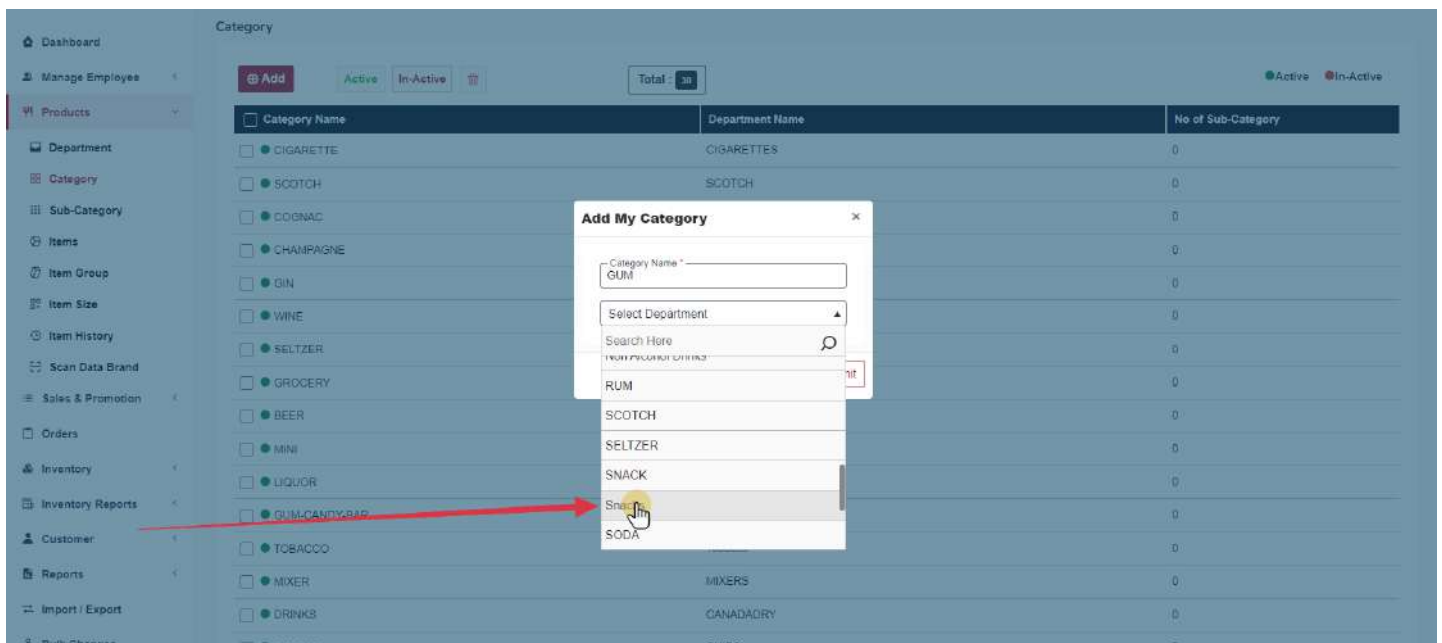
4.2.2 Back Office - Category Name

When creating a new category, always begin with providing it with the appropriate **Name**



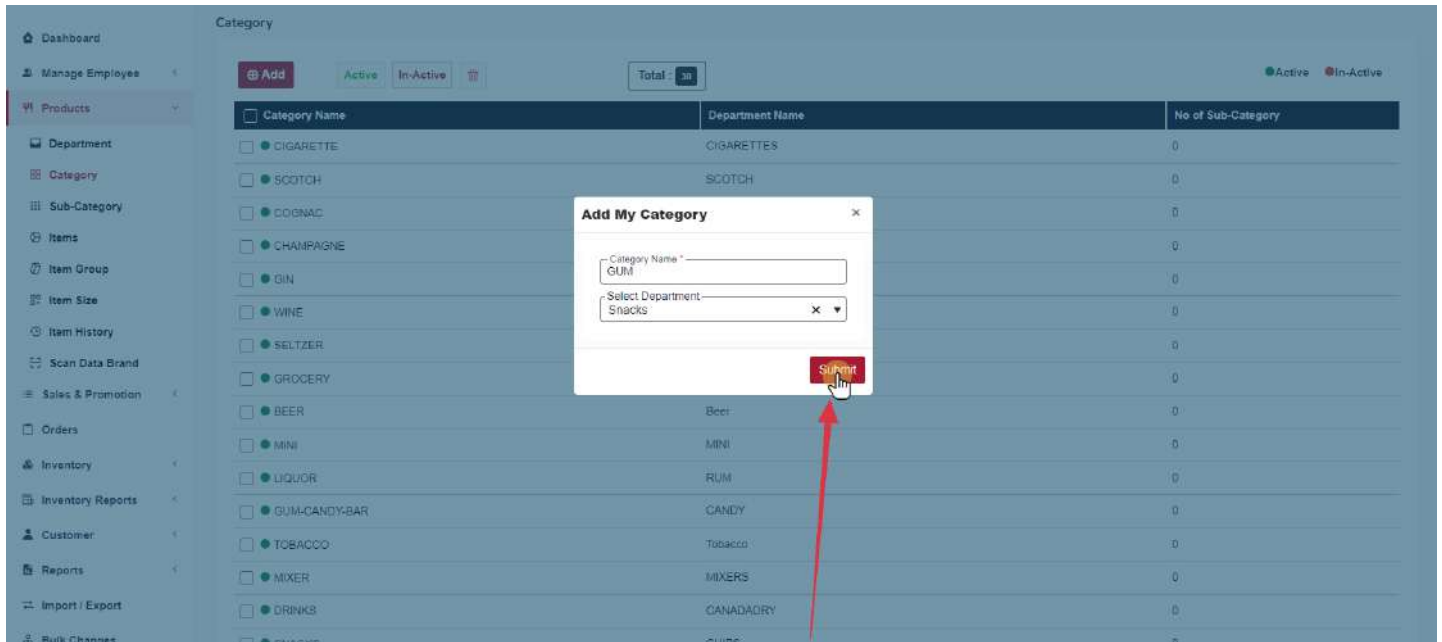
4.2.3 Back Office - Category Target Department

When creating a new category, make sure you select the **Target Department** that it will be categorized under



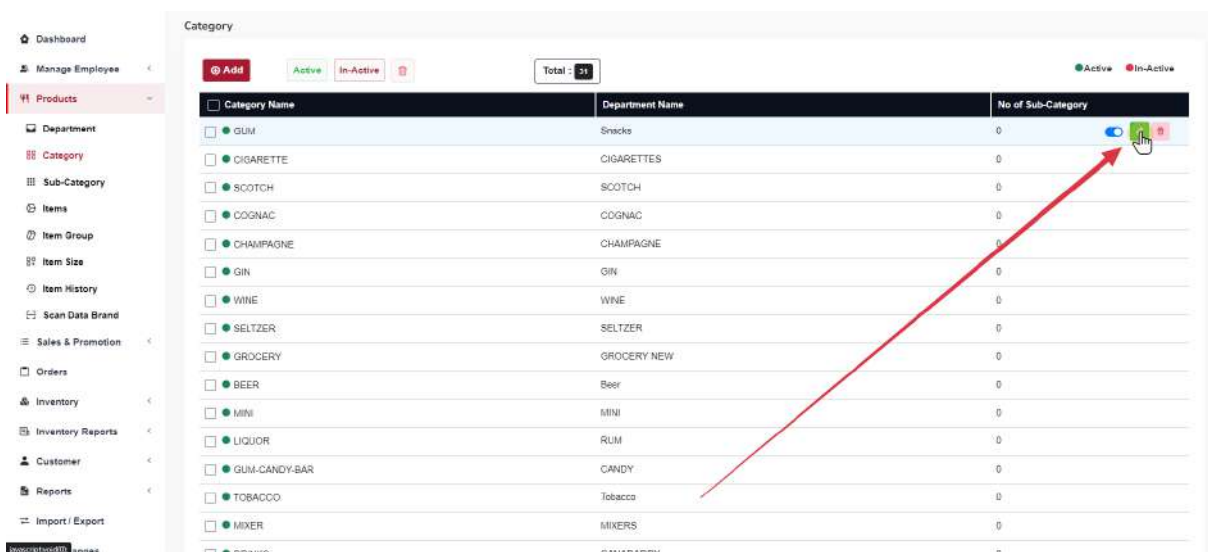
4.2.4 Back Office - Save Category

To confirm the new category, click **Submit**



4.2.5 Back Office - Edit a Category

To edit an existing category, hover over the category and select the **green** edit button



4.2.6 Back Office - Delete a Category

To delete a category, hover over the category and click the **red** trash can button

The screenshot shows the 'Category' management page. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, and Import / Export. The main area displays a table of categories. At the top, there are buttons for 'Add', 'Active', 'In-Active', and a trash can icon, along with a 'Total : 31' indicator. The table has columns for 'Category Name', 'Department Name', and 'No of Sub-Category'. A red arrow points to the red trash can icon in the 'No of Sub-Category' column for the 'GUM' category.

Category Name	Department Name	No of Sub-Category
GUM	Snacks	0
CIGARETTE	CIGARETTES	0
SCOTCH	SCOTCH	0
COGNAC	COGNAC	0
CHAMPAGNE	CHAMPAGNE	0
GIN	GIN	0
WINE	WINE	0
SELTZER	SELTZER	0
GROCERY	GROCERY NEW	0
BEER	Beer	0
MINI	MINI	0
LIQUOR	RUM	0
GUM-CANDY-BAR	CANDY	0
TOBACCO	Tobacco	0
MIXER	MIXERS	0
...

4.2.7 Back Office - Confirm Delete Category

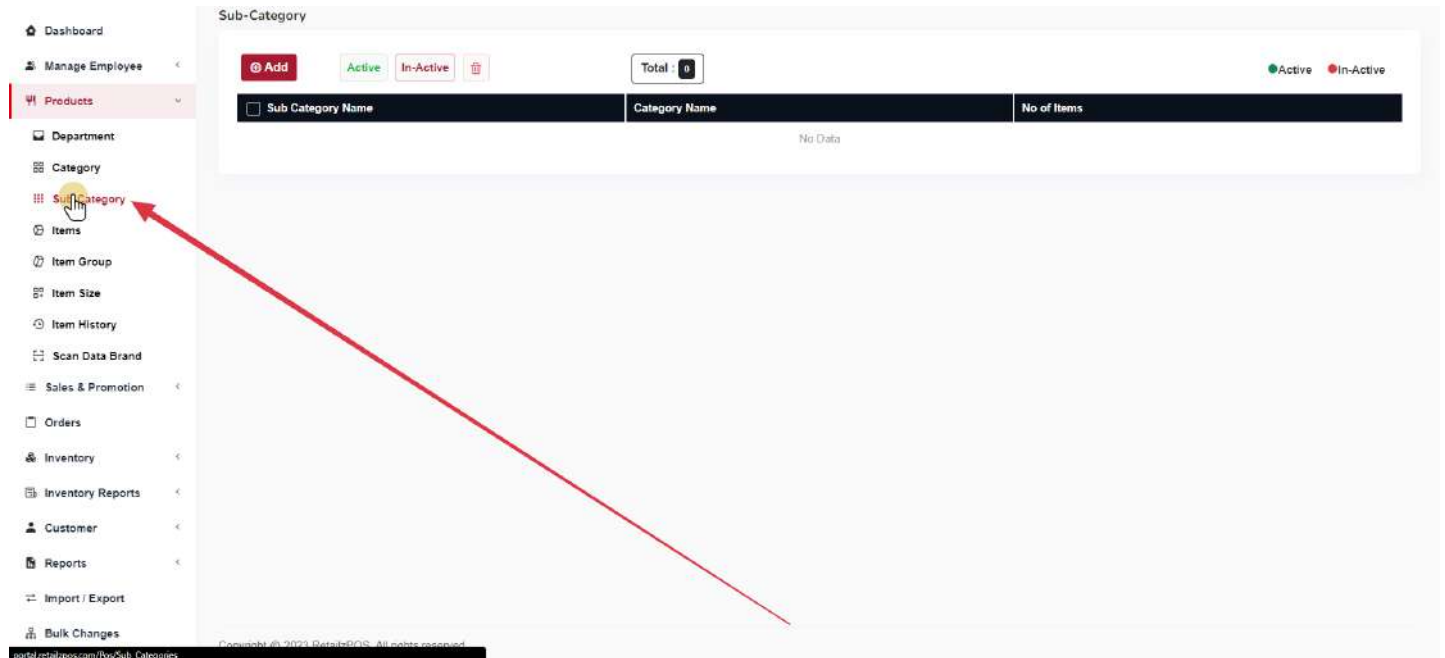
To confirm you would like to delete a category, click **YES**

The screenshot shows the same 'Category' management page as before, but with an alert dialog box in the center. The alert has the title 'Alert' and the message 'Are You Sure want to delete this Category?'. It has two buttons: 'YES' (highlighted in yellow) and 'NO' (in red). A red arrow points to the 'YES' button.

Category Name	Department Name	No of Sub-Category
GUM	Snacks	0
CIGARETTE	CIGARETTES	0
SCOTCH	SCOTCH	0
COGNAC	COGNAC	0
CHAMPAGNE	CHAMPAGNE	0
GIN	GIN	0
WINE	WINE	0
SELTZER	SELTZER	0
GROCERY	GROCERY NEW	0
BEER	Beer	0
MINI	MINI	0
LIQUOR	RUM	0
GUM-CANDY-BAR	CANDY	0
TOBACCO	Tobacco	0
MIXER	MIXERS	0
...

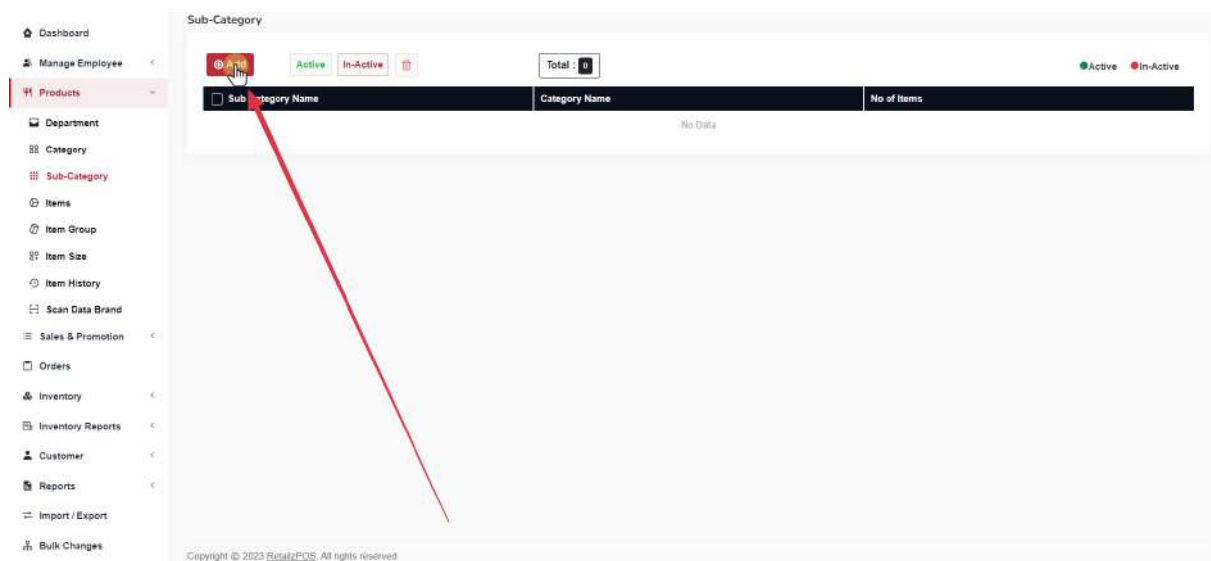
4.3 Back Office - Sub-Category

Under the Product Module, click on **Sub-Category** to bring up your stores sub-category list



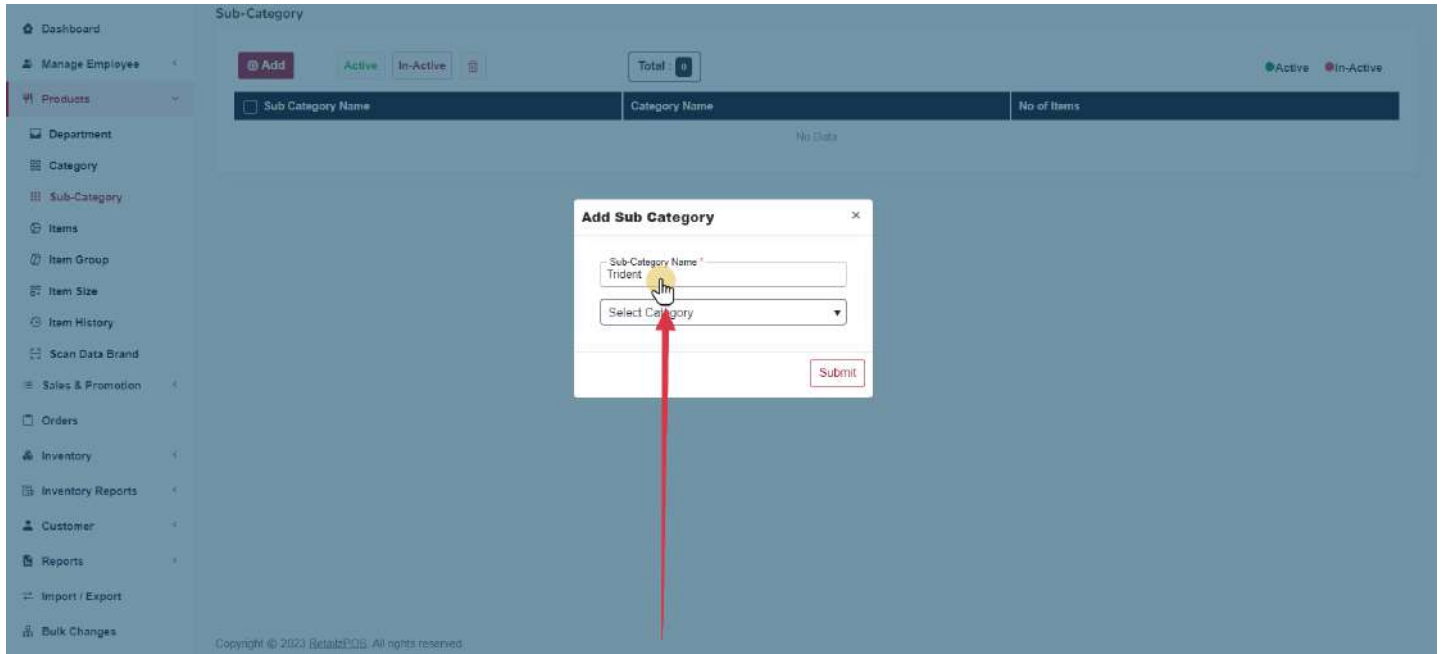
4.3.1 Back Office - Add a Sub-Category

To create a new sub-category, click **Add**



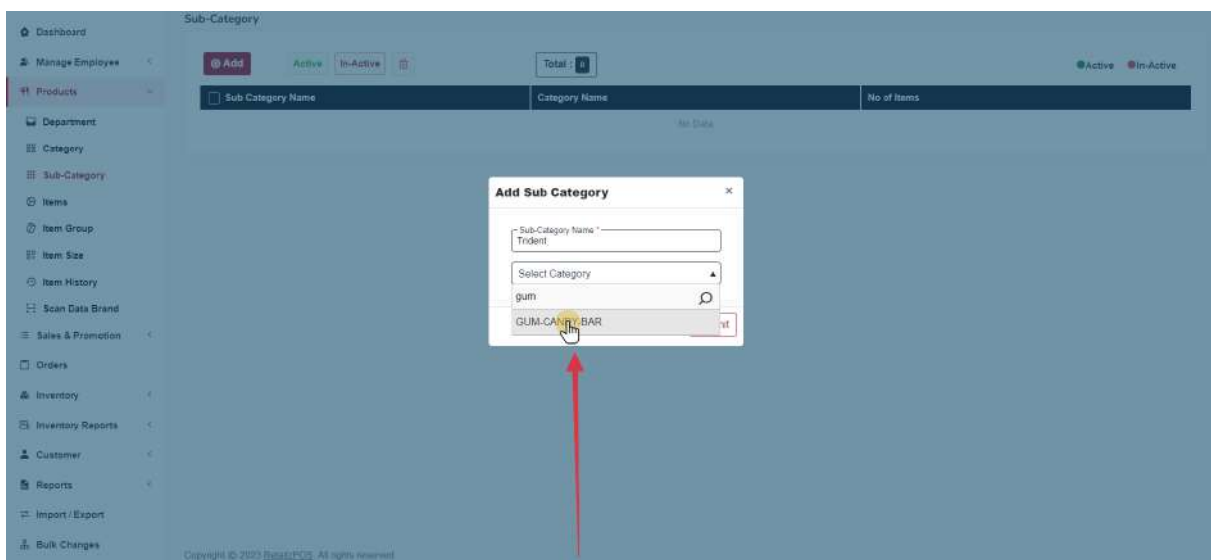
4.3.2 Back Office - Sub-Category Name

When creating a new sub-category, always begin with providing it with the appropriate **Name**



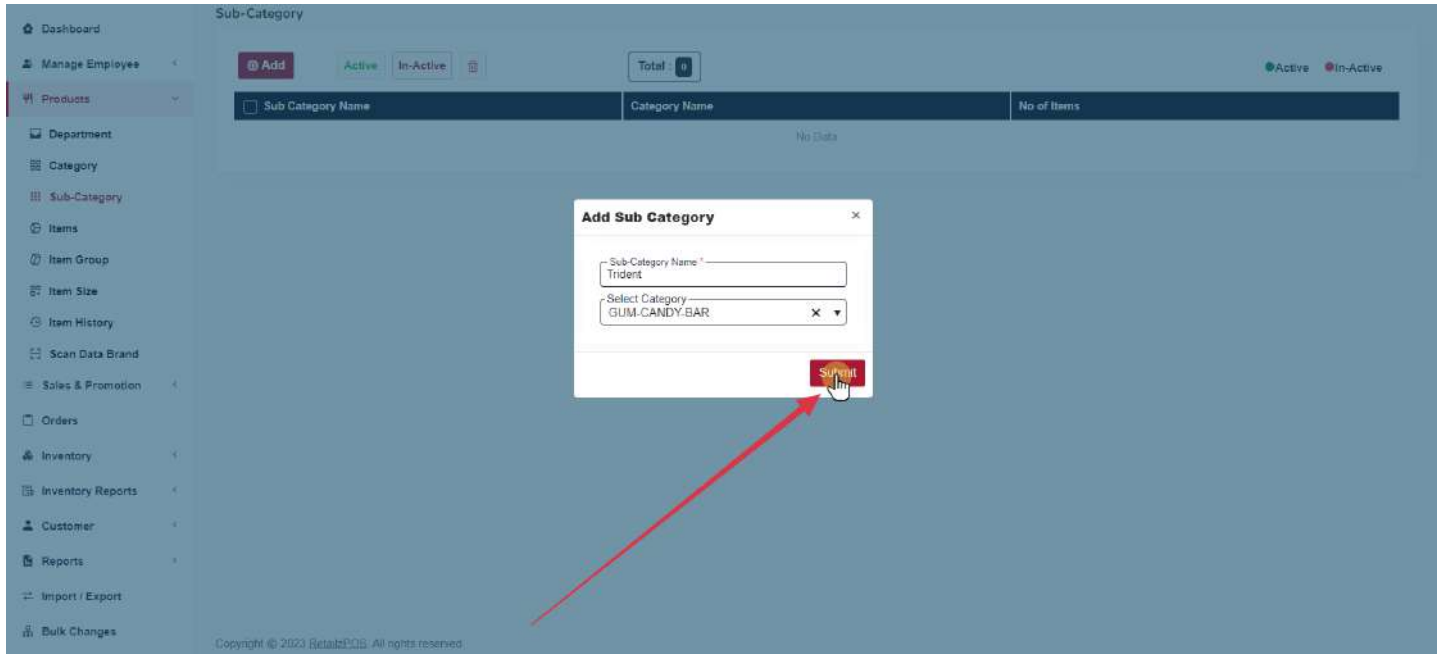
4.3.3 Back Office - Sub-Category Target Category

When creating a new sub-category, make sure you select the **Target Category** that it will be sub-categorized under



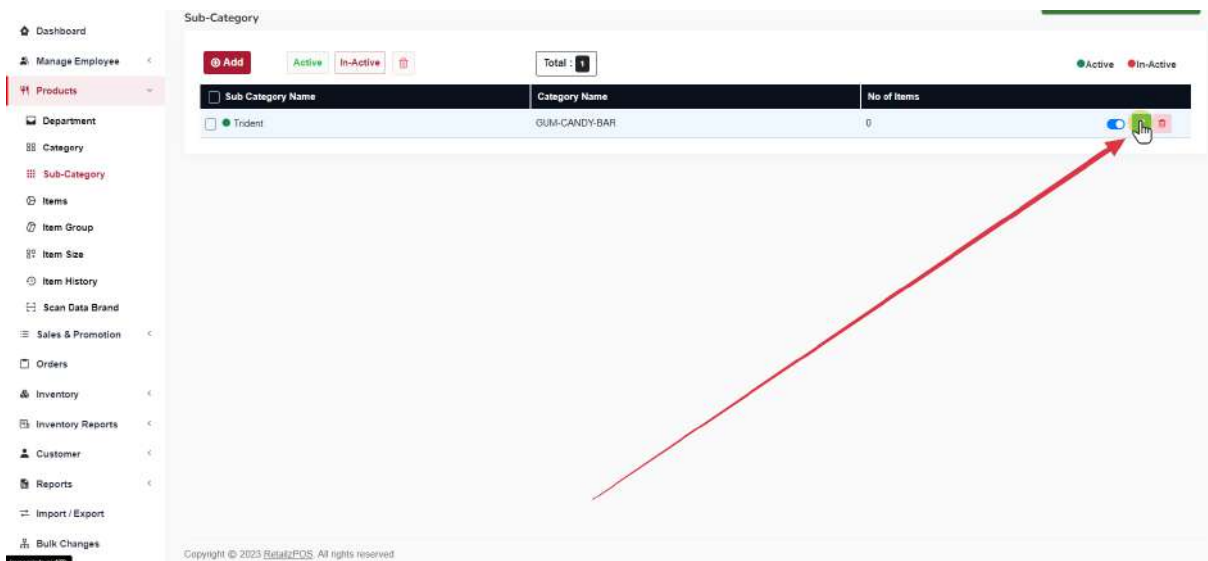
4.3.4 Back Office - Save Sub-Category

To confirm the new sub-category, click **Submit**



4.3.5 Back Office - Edit a Sub-Category

To edit an existing sub-category, hover over the sub-category and select the **green** edit button



4.3.6 Back Office - Delete a Sub-Category

To delete a sub-category, hover over the sub-category and click the **red** trash can button

The screenshot displays the 'Sub-Category' management page. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, and Bulk Changes. The main content area shows a table with columns: Sub Category Name, Category Name, and No of Items. A single row is visible with 'Trident' as the sub-category name and 'GUM-CANDY-BAR' as the category name. Above the table are buttons for 'Add', 'Active', 'In-Active', and a trash can icon. A 'Total: 1' indicator is also present. A red arrow points from the bottom right towards the trash can icon in the table's action column. The footer contains the text 'Copyright © 2023 RetailzPOS. All rights reserved.'

4.3.7 Back Office - Confirm Delete Sub-Category

To confirm you would like to delete a sub-category, click **YES**

This screenshot shows the same 'Sub-Category' management page as the previous one, but with an 'Alert' dialog box open in the center. The dialog box contains the text 'Alert' and 'Are You Sure want to delete this Subcategory?'. It has two buttons: 'YES' (highlighted with a yellow circle and a red arrow) and 'NO'. The background interface is dimmed. The footer text 'Copyright © 2023 RetailzPOS. All rights reserved.' is visible at the bottom.

4.4 Back Office - Items

Under the Product Module, click on **Items** to bring up your stores item list

Items

Add **Active** **In-Active** **Total: 2207** **Page Size: 50** **Page No: 1** **Active** **In-Active**

SKU	Name	Item Type	Department	Unit Cost	Retail Price	Pack	Size	QOH	Status
160	Coke Diet	Standard	MIXERS	\$ 0.77	\$ 3.10	-	20 oz	0	ACTIVE
194	BIC LIGHTER	Standard	General	\$ 0.00	\$ 3.39	-	-	-1	ACTIVE
205	REDBULL 8OZ SUGER FREE	Standard	GROCERY NEW	\$ 1.33	\$ 3.50	-	-	-24	ACTIVE
2037	BUFFALO TRACE	Standard	BOURBON	\$ 21.66	\$ 43.85	-	750 ml	-14	ACTIVE
837	AMERICAN SPIRIT ORANGE	Standard	CIGARETTES	\$ 0.00	\$ 12.75	-	-	0	ACTIVE
841	AMERICAN SPIRIT REG BLUE	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
842	AMERICAN SPIRIT MENTHOL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
843	AMERICAN SPIRIT BLACK	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
844	AMERICAN SPIRIT ORG LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
845	AMERICAN SPIRIT YELLOW	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
846	AMERICAN SPIRIT MEN LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
847	AMERICAN SPIRIT ORG FULL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
9910	1 lb Rose Candle	Standard	-	\$ 0.00	\$ 15.00	-	-	0	ACTIVE

4.4.1 Back Office - Add a New Item

To create a new item in your store, click on **Add**

Items

Add **Active** **In-Active** **Total: 2207** **Page Size: 50** **Page No: 1** **Active** **In-Active**

SKU	Name	Item Type	Department	Unit Cost	Retail Price	Pack	Size	QOH	Status
160	Coke Diet	Standard	MIXERS	\$ 0.77	\$ 3.10	-	20 oz	0	ACTIVE
194	BIC LIGHTER	Standard	General	\$ 0.00	\$ 3.39	-	-	-1	ACTIVE
205	REDBULL 8OZ SUGER FREE	Standard	GROCERY NEW	\$ 1.33	\$ 3.50	-	-	-24	ACTIVE
2037	BUFFALO TRACE	Standard	BOURBON	\$ 21.66	\$ 43.85	-	750 ml	-14	ACTIVE
837	AMERICAN SPIRIT ORANGE	Standard	CIGARETTES	\$ 0.00	\$ 12.75	-	-	0	ACTIVE
841	AMERICAN SPIRIT REG BLUE	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
842	AMERICAN SPIRIT MENTHOL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
843	AMERICAN SPIRIT BLACK	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
844	AMERICAN SPIRIT ORG LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
845	AMERICAN SPIRIT YELLOW	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
846	AMERICAN SPIRIT MEN LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
847	AMERICAN SPIRIT ORG FULL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
9910	1 lb Rose Candle	Standard	-	\$ 0.00	\$ 15.00	-	-	0	ACTIVE

4.4.2 Back Office - General Item Information

When creating a **new item** always make sure to fill out the information to your own personal preference

General

SKU: Name: Select Department: +

Select Category: + Select Sub Category: + Select ScanData Brand: +

Select Item Size: Select Item Type: Select Item Pack: +

☐ Buy As Case Units In Case: Case Cost (\$):

Case Price (\$): Unit Cost (\$):

Buy Down (\$): Retail Price (\$): CC Price (\$):

MarkUp (%): Margin (%):

Quantity In Store: ☒ Select Age:

Tax

☐ Non Taxable ☒ TAX1(7 %)

Split-Pack

☐ Show In Selection Dialog

+ Add New Pack + Add Pack From Existing List - Remove Pack

Name	UPC	Pack Size	Cost	Buydown	Price	Mark Up	Margin	QOH
No Data Found!								

Quantity: Price (\$):

Save

4.4.3 Back Office - Item Type

When creating a new item, select the **Item Type**

General

SKU: Name: Select Department: +

Select Category: + Select Sub Category: + Select ScanData Brand: +

Select Item Size: Select Item Type: Select Item Pack: +

☐ Buy As Case Units In Case: Case Cost (\$):

Case Price (\$): Unit Cost (\$):

Buy Down (\$): Retail Price (\$): CC Price (\$):

MarkUp (%): Margin (%):

Quantity In Store: ☒ Select Age:

Tax

☐ Non Taxable ☒ TAX1(7 %)

Split-Pack

☐ Show In Selection Dialog

+ Add New Pack + Add Pack From Existing List - Remove Pack

Name	UPC	Pack Size	Cost	Buydown	Price	Mark Up	Margin	QOH
No Data Found!								

Quantity: Price (\$):

Save

4.4.4 Back Office - Split Pack

To make an item a split pack, go to item type and select **Split Pack**

The screenshot displays the 'General' tab of the item management interface. The item name is 'MARLBORO SILVER BOX'. The 'Select Item Type' dropdown menu is open, showing options: 'Standard', 'Split-Pack', and 'Standard'. A red arrow points to the 'Split-Pack' option, which is highlighted by a yellow circle. The 'Units In Case' is set to 0. The 'UPC List' shows a main UPC of 94684020216. The 'Price (\$)' is \$25.99. The 'Split-Pack' section at the bottom has a 'Show In Selection Dialog' checkbox and buttons for '+ Add New Pack', '+ Add Pack From Existing List', and '- Remove Pack'. A table below shows columns for Name, UPC, Pack Size, Cost, Buydown, Price, Mark Up, Margin, and QOH, with a message 'No Data Found!'.

General

SKU: [] Name: MARLBORO SILVER BOX Select Department: Cigs

Select Category: [] Select Sub Category: [] Select ScanData Brand: []

Select Item Size: [] Select Item Type: Standard

Standard

Split-Pack

Buy As Case: [] Units In Case: 0

Case Price (\$): 0 Unit Cost (\$): 0

Buy Down (\$): 0 Retail Price (\$): 25.99 CC Price (\$): 26.77

MarkUp (%): 0.00 Margin (%): 0.00

Quantity In Store: 0 Select Age: []

UPC List

Main UPC: 94684020216

Quantity: 1 Price (\$): \$25.99

Split-Pack

Show In Selection Dialog

+ Add New Pack + Add Pack From Existing List - Remove Pack

Name	UPC	Pack Size	Cost	Buydown	Price	Mark Up	Margin	QOH
No Data Found!								

Save

4.4.5 Back Office - Confirm Split Pack

To confirm split pack selection, click **YES**

The screenshot displays the 'General' tab of a product management interface. The product name is 'MARLBORO SILVER BOX'. A modal dialog titled 'Change Item Type!' is overlaid on the screen, asking 'Do you want to Change Item Type to Split-Pack?'. The dialog has two buttons: 'YES' and 'NO'. A red arrow points to the 'YES' button. The background shows various product details and a 'Split-Pack' section at the bottom.

General

SKU: MARLBORO SILVER BOX

Select Department: Cigs

Select Category: +

Select Sub Category: +

Select ScanData Brand: +

Select Item Size: +

Select Item Type: Split-Pack

Select Item Pack: CARTON

Split-Pack

Buy As Case: ☐

Case Price (\$): 0

Buy Down (\$): 0

MarkUp (%): 0.00

Quantity in Store: 0

Units in Case: +

Case Cost (\$): 0.00

Select Age: +

UPC List

Main UPC: 94684626216

Quantity: 1

Price (\$): \$25.99

+ Add New Pack + Add Pack From Existing List - Remove Pack

No Data Found!

Save

4.4.6 Back Office - Split Pack Selection

To edit split packs, click **Split-Pack**

The screenshot shows the Back Office interface. On the left sidebar, the 'Products' menu is expanded, and the 'Split-Pack' button is highlighted with a red arrow. The main area displays the 'Split-Pack' section. At the top, there are input fields for 'Buy Down (\$)', 'Retail Price (\$)', 'CC Price (\$)', 'MarkUp (%)', 'Margin (%)', and 'Quantity in Store'. Below these is a 'Split-Pack' section with a table of pack sizes. The table has columns: Name, UPC, Pack Size, Cost, Buydown, Price, Mark Up, Margin, and QOH. The first row shows 'CARTON' with a UPC of 94684329216, Pack Size of 10, Cost of \$ 0.00, Buydown of \$ 0.00, Price of \$ 25.99, Mark Up of % 0.00, Margin of % 0.00, and QOH of 0. Below the table is a 'Distributors' section with a 'Select Distributor' dropdown, 'Item Distributor Code' input, and 'Purchase Cost (\$)' input. The 'Apply' and 'Clear' buttons are visible. At the bottom right, there is a 'Save' button.

4.4.7 Back Office - Add New Split Pack Size

Click **Add New Pack** to add a new split pack size

The screenshot shows the Back Office interface. On the left sidebar, the 'Products' menu is expanded, and the 'Split-Pack' button is highlighted with a red arrow. The main area displays the 'Split-Pack' section. At the top, there are input fields for 'Buy Down (\$)', 'Retail Price (\$)', 'CC Price (\$)', 'MarkUp (%)', 'Margin (%)', and 'Quantity in Store'. Below these is a 'Split-Pack' section with a table of pack sizes. The table has columns: Name, UPC, Pack Size, Cost, Buydown, Price, Mark Up, Margin, and QOH. The first row shows 'CARTON' with a UPC of 94684329216, Pack Size of 10, Cost of \$ 0.00, Buydown of \$ 0.00, Price of \$ 25.99, Mark Up of % 0.00, Margin of % 0.00, and QOH of 0. Below the table is a 'Distributors' section with a 'Select Distributor' dropdown, 'Item Distributor Code' input, and 'Purchase Cost (\$)' input. The 'Apply' and 'Clear' buttons are visible. At the bottom right, there is a 'Save' button. A red arrow points to the '+ Add New Pack' button in the 'Split-Pack' section.

4.4.8 Back Office - Select Split Pack Size

Select your **Pack Sizes** for Split Pack

The screenshot shows the 'Select New Pack for Item' dialog box. It has two main sections: 'Higher Pack' and 'Lower Pack'. Under 'Higher Pack', there are checkboxes for 90-PACK, 48-PACK, 35-PACK, 30-PACK, and 24-PACK. Under 'Lower Pack', there are checkboxes for 20-PACK, 18-PACK, 15-PACK, 12-PACK, 10-PACK, 8-PACK, 6-PACK, 5-PACK, 4-PACK, 3-PACK, 2-PACK, and SINGLE. The 'SINGLE' checkbox is highlighted with a red arrow. A 'SUBMIT' button is at the bottom right of the dialog. The background shows the 'Split Pack' tab selected in the 'General' section of the product form.

4.4.9 Back Office - Confirm Split Pack Selection

To confirm your split pack size selection, click **SUBMIT**

The screenshot shows the 'Select New Pack for Item' dialog box. In the 'Lower Pack' section, the 'SINGLE' checkbox is now checked. A red arrow points to the 'SUBMIT' button at the bottom right of the dialog, indicating the next step to confirm the selection. The background shows the 'Split Pack' tab selected in the 'General' section of the product form.

4.4.10 Back Office - Add New Split Pack UPC

Click the plus sign under UPC to **Add New Split Pack UPC** to this split pack size

The screenshot shows the 'Products' section of the Back Office. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Quick Add Item, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, and Import / Export. The 'Products' section has a 'Choose Picture' button and a 'Split-Pack' tab selected. The main area displays a form for adding a new split pack. At the top, there are input fields for Buy Down (\$), Retail Price (\$), CC Price (\$), MarkUp (%), Margin (%), Quantity in Store, and Select Age. Below this is a table for 'Split-Pack' with columns: Name, UPC, Pack Size, Cost, Buydown, Price, Mark Up, Margin, and QOH. The table has two rows: 'CARTON' and 'SINGLE'. A red arrow points to the plus sign under the 'SINGLE' row's UPC column. Below the table is a 'Distributors' section with a 'Select Distributor' dropdown, 'Item Distributor Code' input, and 'Purchase Cost (\$)' input. At the bottom is a table for distributors with columns: Distributor Name, Item Distributor Code, Primary, and Last Cost (\$). The 'HLA (HLA)' distributor is listed with a primary status and a last cost of 0.00. A 'Save' button is at the bottom right.

4.4.11 Back Office - Split Pack Price

Enter **Split Pack UPC Price**

The screenshot shows the same 'Products' section as the previous one, but with the 'Split-Pack' table updated. The 'SINGLE' row now has a price of \$ 0.00. A red arrow points to the price input field for the 'SINGLE' row. The 'Distributors' section and the 'Save' button are also visible.

4.4.12 Back Office - Item Distributor

Click **Distributors** to access your item distributor settings

The screenshot displays the 'Item Distributor' settings page. On the left, the 'Products' menu is expanded, and 'Distributors' is selected. A red arrow points from the 'Distributors' menu item to the 'Distributors' tab in the main content area. The 'Distributors' tab shows a table with one distributor: HLA (HLA) with Item Distributor Code 091080, Primary status checked, and Last Cost (\$). Below the table are 'Others' settings including 'Select Item Group' and 'Select E-Commerce Api'.

4.4.13 Back Office - Select Item Distributor

When adding a distributor to an item, click **Select Distributor**

The screenshot displays the 'Select Item Distributor' page. On the left, the 'Products' menu is expanded, and 'Distributors' is selected. A red arrow points from the 'Distributors' menu item to the 'Select Distributor' button in the main content area. The 'Distributors' tab shows a table with the message 'No Data Found!'. Below the table are 'Others' settings including 'Select Item Group' and 'Select E-Commerce Api'.

4.4.14 Back Office - Enter Item Distributor Code

When adding a distributor to an item, provide the **Item Distributor Code**

The screenshot shows the 'Distributors' section of the Back Office interface. On the left, there is a sidebar with a 'Products' menu and a 'Distributors' sub-menu. The main area has a 'Distributors' tab selected. Below the tab, there is a 'Select Distributor' dropdown menu with 'HLA' selected. To the right of this is the 'Item Distributor Code' input field, which is highlighted by a red arrow. Further right is the 'Purchase Cost (\$)' input field. At the bottom right of the 'Distributors' section are 'Apply' and 'Clear' buttons. Below the input fields is a table with the following columns: 'Distributor Name', 'Item Distributor Code', 'Primary', and 'Last Cost (\$)'. The table is currently empty, with a 'No Data Found!' message. Below the table is an 'Others' section with a 'Select Item Group' dropdown menu and a 'Select E-Commerce Api' dropdown menu. At the bottom right of the 'Others' section is a 'Save' button.

4.4.15 Back Office - Enter Item Purchase Cost

When entering item distributor information to an item, provide your **Purchase Cost**

The screenshot shows the 'Distributors' section of the Back Office interface. On the left, there is a sidebar with a 'Products' menu and a 'Distributors' sub-menu. The main area has a 'Distributors' tab selected. Below the tab, there is a 'Select Distributor' dropdown menu with 'HLA' selected. To the right of this is the 'Item Distributor Code' input field, which contains the value '091680'. Further right is the 'Purchase Cost (\$)' input field, which is highlighted by a red arrow. At the bottom right of the 'Distributors' section are 'Apply' and 'Clear' buttons. Below the input fields is a table with the following columns: 'Distributor Name', 'Item Distributor Code', 'Primary', and 'Last Cost (\$)'. The table is currently empty, with a 'No Data Found!' message. Below the table is an 'Others' section with a 'Select Item Group' dropdown menu and a 'Select E-Commerce Api' dropdown menu. At the bottom right of the 'Others' section is a 'Save' button.

4.4.16 Back Office - Apply Item Distributor

To apply item distributor information to an item, click **Apply**

The screenshot shows the 'Apply Item Distributor' interface. On the left, the 'Products' menu is expanded, and 'Distributors' is selected. The main content area has a 'Distributors' section with a table showing 'No Data Found!'. A red arrow points to the 'Apply' button in the top right of the 'Distributors' section. Below the table is an 'Others' section with various input fields and checkboxes.

4.4.17 Back Office - Other Item Features

Click **Others** to access other item features

The screenshot shows the 'Other Item Features' interface. On the left, the 'Products' menu is expanded, and 'Others' is selected. The main content area has an 'Others' section with various input fields and checkboxes. A red arrow points to the 'Others' button in the left sidebar.

4.4.18 Back Office - Add Item To Item Group

To add an item to an item group, select **Item Group**

The screenshot shows the 'Add Item' form in the Back Office. The left sidebar contains a navigation menu with 'Products' selected. The main form has several sections: 'General' (with a 'Choose Picture' button), 'Others' (with a 'Select Item Group' dropdown and a 'Re-Order Qty' input field), 'Tag Along /Bottle Deposit' (with fields for UPC, Price (\$), and QTY), and 'Price Level' (with radio buttons for 'Regular Price', 'Wholesale (15.00%)', and 'a (5.00%)'). A red arrow points from the 'Re-Order Qty' input field to the 'Select Item Group' dropdown menu.

4.4.19 Back Office - Enter Item Re-Order Quantity

To enter item re-order quantity, select **Re-Order Qty.**

The screenshot shows the 'Add Item' form in the Back Office. The left sidebar contains a navigation menu with 'Products' selected. The main form has several sections: 'General' (with a 'Choose Picture' button), 'Others' (with a 'Select Item Group' dropdown and a 'Re-Order Qty' input field), 'Tag Along /Bottle Deposit' (with fields for UPC, Price (\$), and QTY), and 'Price Level' (with radio buttons for 'Regular Price', 'Wholesale (15.00%)', and 'a (5.00%)'). A red arrow points from the 'Re-Order Qty' input field to the 'Re-Order Qty' input field.

4.4.20 Back Office - Select Other Item Features

Enter all **Other** item features as needed

Dashboard

Manage Employee

Products

Department

Category

Sub-Category

Items

Item Group

Item Size

Item History

Scan Data Brand

Quick Add Item

Sales & Promotion

Orders

Inventory

Inventory Reports

Customer

Reports

Import / Export

Choose Picture

General

Split-Pack

Distributors

Others

Price Level

Others

1 Select Item Group

Select E-Commerce Api

Re-Order Qty: 10

☐ Open Quantity

☐ In-Active

☐ Non-Discountable

☐ Non Return Item

☐ Non-Revenue

☐ Negative Item

☐ Open Price

☐ Deli-PLU

☐ EBT

Tag Along /Bottle Deposit

UPC

Price (\$)

QTY

Item

☐ Multiply By Pack

Remove Tag Along

Price Level

☒ Regular Price

☐ Wholesale (15.00%)

☐ a (5.00%)

Save

4.4.21 Back Office - Tag Along UPC

To **add a tag along** item to a product, enter the item UPC

Dashboard

Manage Employee

Products

Department

Category

Sub-Category

Items

Item Group

Item Size

Item History

Scan Data Brand

Quick Add Item

Sales & Promotion

Orders

Inventory

Inventory Reports

Customer

Reports

Import / Export

Choose Picture

General

Split-Pack

Distributors

Others

Price Level

Tag Along

1 Select Item Group

Select E-Commerce Api

Re-Order Qty: 10

☐ Open Quantity

☐ In-Active

☐ Non-Discountable

☐ Non Return Item

☐ Non-Revenue

☐ Negative Item

☐ Open Price

☐ Deli-PLU

☐ EBT

Tag Along /Bottle Deposit

UPC

Price (\$)

QTY

Item

☐ Multiply By Pack

Remove Tag Along

Price Level

☒ Regular Price

☐ Wholesale (15.00%)

☐ a (5.00%)

Save

4.4.22 Back Office - Tag Along Quantity

Enter the **Quantity** of the tag along item

The screenshot shows the 'Tag Along' configuration page in the Back Office. On the left is a sidebar with navigation links: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Quick Add Item, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, and Import / Export. The main content area has a 'Choose Picture' button with a red arrow icon. Below it are tabs for General, Split-Pack, Distributors, Others, and Price Level (selected). The 'Tag Along /Bottle Deposit' section contains fields for UPC, Price (\$), and QTY. A red arrow points to the QTY field, which currently has the value '10'. There are checkboxes for 'Open Quantity', 'Non Return Item', 'Negative Item', 'Del-PLU', 'In-Active', 'Non-Revenue', 'Open Price', and 'EBT'. The 'Price Level' section has radio buttons for 'Regular Price' (selected), 'Wholesale (15.00%)', and 'a (5.00%)'. A 'Remove Tag Along' button is at the bottom right. A 'Save' button is at the bottom right of the page.

4.4.23 Back Office - Tag Along Multiply By Pack

To multiply a tag along by pack size, select **Multiply By Pack**

This screenshot shows the same 'Tag Along' configuration page as the previous one, but with the 'QTY' field set to '1'. A red arrow points to the 'Multiply By Pack' checkbox, which is now checked. The 'Price Level' section remains the same with 'Regular Price' selected. The 'Remove Tag Along' button is still present. The 'Save' button is at the bottom right.

4.4.24 Back Office - Remove Tag Along

To remove a tag along, select **Remove Tag Along**

The screenshot displays the 'Products' section of the Back Office. On the left, a sidebar lists various categories, with 'Price Level' highlighted. The main area shows a form for item management. At the top, there's a 'Select Item Group' dropdown and a 'Re-Order Qty' field. Below these are several checkboxes for item properties. The 'Tag Along / Bottle Deposit' section contains fields for 'UPC', 'Price (\$)', 'QTY', and 'Item', along with a 'Remove Tag Along' button. A red arrow points from the bottom right towards this button. The 'Price Level' section at the bottom has radio buttons for 'Regular Price', 'Wholesale (15.00%)', and 'a (5.00%)'.

4.4.25 Back Office - Item Price Level

If you wish to provide an item with a price level, select the appropriate **Price Level** needed

This screenshot shows the same 'Products' section as the previous one, but with a focus on the 'Price Level' section. A red arrow points to the 'Regular Price' radio button, which is selected. The 'Tag Along / Bottle Deposit' section is visible above it, and the 'Remove Tag Along' button is also present. The sidebar on the left remains the same, with 'Price Level' highlighted.

4.4.26 Back Office - Save New Item

When all item information is filled in, make sure to click **Save** to confirm your new item

General

SKU: [] Name: Coke Diet Select Department: MIXERS

Select Category: MIXER Select Sub Category: Select Item Size: 20 oz. Select Item Type: Standard Select Item Pack: []

Tax

☐ Non Taxable
☒ TAX1(6.35%)
☐ CT STATE TAX(6.25%)

Split-Pack

☐ Show In Selection Dialog

+ Add New Pack + Add Pack From Existing List - Remove Pack

Name	UPC	Pack Size	Cost	Buydown	Price	Mark Up	Margin	QOH
No Data Found!								

Save

4.4.27 Back Office - Clone an Item

To clone an existing item, hover over your item and click on the **blue** clone button

Items

+ Add Active In-Active Total: 220 Page Size: 50 Page No: 1

SKU	Name	Item Type	Department	Unit Cost	Retail Price	Pack	Size	QOH	Status
160	Coke Diet	Standard	MIXERS	\$ 0.77	\$ 3.10	-	20 oz	0	ACTIVE
194	BIG LIGHTER	Standard	General	\$ 0.00	\$ 3.39	-	-	-1	ACTIVE
205	REDBULL 8OZ SUGER FREE	Standard	GROCERY NEW	\$ 1.33	\$ 3.50	-	-	-24	ACTIVE
2037	BUFFALO TRACE	Standard	BOURBON	\$ 21.66	\$ 42.85	-	750 ml	-14	ACTIVE
837	AMERICAN SPIRIT ORANGE	Standard	CIGARETTES	\$ 0.00	\$ 12.75	-	-	0	ACTIVE
841	AMERICAN SPIRIT REG. BLUE	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
842	AMERICAN SPIRIT MENTHOL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
843	AMERICAN SPIRIT BLACK	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
844	AMERICAN SPIRIT ORG. LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
845	AMERICAN SPIRIT YELLOW	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
846	AMERICAN SPIRIT MEN LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
847	AMERICAN SPIRIT ORG. FULL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
848	AMERICAN SPIRIT ORG. FULL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE

4.4.28 Back Office - Edit an Item

To edit an existing item, hover over the item and select the **green** edit button

The screenshot shows the 'Items' table in the Back Office. The table has columns: SKU, Name, Item Type, Department, Unit Cost, Retail Price, Pack, Size, QOH, and Status. A red arrow points to the green edit button (a pencil icon) in the Status column of the first row (SKU 160, Name: Coke Diet).

SKU	Name	Item Type	Department	Unit Cost	Retail Price	Pack	Size	QOH	Status
160	Coke Diet	Standard	MIXERS	\$ 0.77	\$ 3.10	-	20 oz	0	ACTIVE
194	BIC LIGHTER	Standard	General	\$ 0.00	\$ 3.39	-	-	-1	ACTIVE
205	REDBULL 8OZ SUGER FREE	Standard	GROCERY NEW	\$ 1.33	\$ 3.50	-	-	-24	ACTIVE
2037	BUFFALO TRACE	Standard	BOURBON	\$ 21.66	\$ 43.85	-	750 ml	-14	ACTIVE
837	AMERICAN SPIRIT ORANGE	Standard	CIGARETTES	\$ 0.00	\$ 12.75	-	-	0	ACTIVE
841	AMERICAN SPIRIT REG BLUE	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
842	AMERICAN SPIRIT MENTHOL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
843	AMERICAN SPIRIT BLACK	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
844	AMERICAN SPIRIT ORG LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
845	AMERICAN SPIRIT YELLOW	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
846	AMERICAN SPIRIT MEN LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
847	AMERICAN SPIRIT ORG FULL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
9910	1 lb Rose Candle	Standard	-	\$ 0.00	\$ 15.00	-	-	0	ACTIVE

4.4.29 Back Office - Delete an Item

To delete a item, hover over the item and click the **red** trash can button

The screenshot shows the 'Items' table in the Back Office. A red arrow points to the red trash can button in the Status column of the first row (SKU 160, Name: Coke Diet).

SKU	Name	Item Type	Department	Unit Cost	Retail Price	Pack	Size	QOH	Status
160	Coke Diet	Standard	MIXERS	\$ 0.77	\$ 3.10	-	20 oz	0	ACTIVE
194	BIC LIGHTER	Standard	General	\$ 0.00	\$ 3.39	-	-	-1	ACTIVE
205	REDBULL 8OZ SUGER FREE	Standard	GROCERY NEW	\$ 1.33	\$ 3.50	-	-	-24	ACTIVE
2037	BUFFALO TRACE	Standard	BOURBON	\$ 21.66	\$ 43.85	-	750 ml	-14	ACTIVE
837	AMERICAN SPIRIT ORANGE	Standard	CIGARETTES	\$ 0.00	\$ 12.75	-	-	0	ACTIVE
841	AMERICAN SPIRIT REG BLUE	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
842	AMERICAN SPIRIT MENTHOL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
843	AMERICAN SPIRIT BLACK	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
844	AMERICAN SPIRIT ORG LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
845	AMERICAN SPIRIT YELLOW	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
846	AMERICAN SPIRIT MEN LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
847	AMERICAN SPIRIT ORG FULL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
9910	1 lb Rose Candle	Standard	-	\$ 0.00	\$ 15.00	-	-	0	ACTIVE

4.4.30 Back Office - Confirm Delete Item

To confirm you would like to delete this item, click **YES**

The screenshot shows the 'Items' management page in the Back Office. A table lists various items with columns for SKU, Name, Item Type, Department, Unit Cost, Retail Price, Pack, Size, QOH, and Status. An alert dialog box is displayed over the table, asking 'Are You Sure Want To Delete This Item?'. The dialog has two buttons: 'YES' (highlighted with a red arrow) and 'NO'.

SKU	Name	Item Type	Department	Unit Cost	Retail Price	Pack	Size	QOH	Status
190	Coke Diet	Standard	MIXERS	\$ 0.77	\$ 3.10	-	20 oz	0	ACTIVE
194	BIC LIGHTER	Standard	General	\$ 0.00	\$ 3.39	-	-	-1	ACTIVE
205	REDBULL 8OZ SUGER FREE	Standard	GROCERY NEW	\$ 1.33	\$ 3.50	-	-	-24	ACTIVE
2037	BUFFALO TRACE	Standard			\$ 43.85	-	750 ml	-14	ACTIVE
837	AMERICAN SPIRIT ORANGE	Standard			\$ 12.75	-	-	0	ACTIVE
841	AMERICAN SPIRIT REG BLUE	Standard			\$ 12.89	-	-	0	ACTIVE
842	AMERICAN SPIRIT MENTHOL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
843	AMERICAN SPIRIT BLACK	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
844	AMERICAN SPIRIT ORG LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
845	AMERICAN SPIRIT YELLOW	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
846	AMERICAN SPIRIT MEN LIGHT	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
847	AMERICAN SPIRIT ORG FULL	Standard	CIGARETTES	\$ 0.00	\$ 12.89	-	-	0	ACTIVE
2010	La Rosa Candle	Standard		\$ 0.00	\$ 15.99	-	-	0	ACTIVE

4.5 Back Office - Item Group

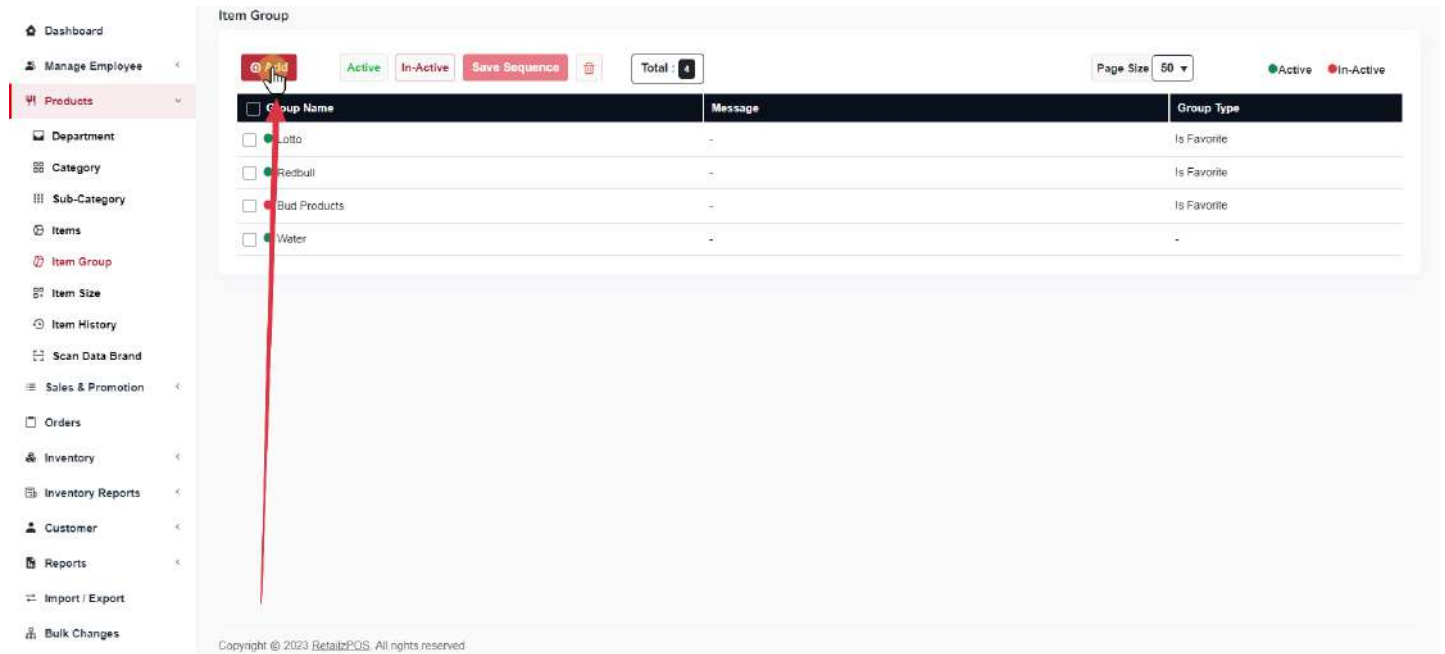
Under the Product Module, click on **Item Group** to bring up your stores item groups

The screenshot shows the 'Item Group' management page. The sidebar on the left has a red arrow pointing to the 'Item Group' menu item. The main content area displays a table of item groups.

Group Name	Message	Group Type
Lotto	-	Is Favorite
Redbull	-	Is Favorite
Bud Products	-	Is Favorite

4.5.1 Back Office - Create a New Item Group

To create a new item group in your store, click on **Add**



Item Group

Buttons: Add, Active, In-Active, Save Sequence, Total: 4

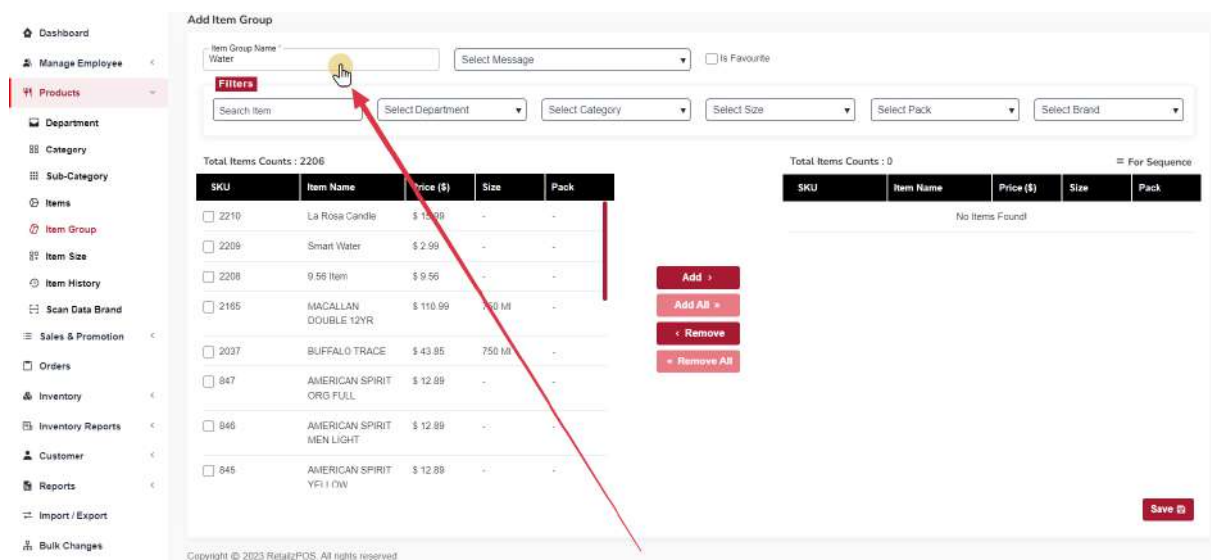
Group Name	Message	Group Type
<input type="checkbox"/> Lotto	-	Is Favorite
<input type="checkbox"/> Redbull	-	Is Favorite
<input type="checkbox"/> Bud Products	-	Is Favorite
<input type="checkbox"/> Water	-	-

Page Size: 50 | Active | In-Active

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4.5.2 Back Office - Name Item Group

When creating a new item group, begin with an **Item Group Name**



Add Item Group

Item Group Name: Water | Select Message | ☐ Is Favourite

Filters: Search Item | Select Department | Select Category | Select Size | Select Pack | Select Brand

Total Items Counts: 2206

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2210	La Rosa Candle	\$ 13.99	-	-
<input type="checkbox"/> 2209	Smart Water	\$ 2.99	-	-
<input type="checkbox"/> 2208	9.56 Item	\$ 9.56	-	-
<input type="checkbox"/> 2165	MACALLAN DOUBLE 12YR	\$ 110.99	750 ml	-
<input type="checkbox"/> 2027	BUFFALO TRACE	\$ 43.95	750 ml	-
<input type="checkbox"/> 847	AMERICAN SPIRIT ORG FULL	\$ 12.89	-	-
<input type="checkbox"/> 846	AMERICAN SPIRIT MEN LIGHT	\$ 12.89	-	-
<input type="checkbox"/> 845	AMERICAN SPIRIT YCFI 17W	\$ 12.89	-	-

Total Items Counts: 0 | For Sequence

No Items Found

Buttons: Add, Add All, Remove, Remove All, Save

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4.5.3 Back Office - Search Items in Item Group

To add items to a group you can filter by **searching item names**

The screenshot shows the 'Add Item Group' interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, and Bulk Changes.

The main area is titled 'Add Item Group'. It features a search bar with 'Water' entered, a 'Select Message' dropdown, and an 'Is Favourite' checkbox. Below these are 'Filters' with a 'Search Item' dropdown (containing 'Water'), a 'Select Department' dropdown, a 'Select Category' dropdown, a 'Select Size' dropdown, a 'Select Pack' dropdown, and a 'Select Brand' dropdown.

Below the filters, there are two tables. The left table, titled 'Total Items Counts : 28', lists items with columns: SKU, Item Name, Price (\$), Size, and Pack. The right table, titled 'Total Items Counts : 0', is empty and has a 'No Items Found!' message. A 'For Sequence' checkbox is also present.

Between the tables are buttons: 'Add >', 'Add All >', '< Remove', and '< Remove All'. A 'Save' button is at the bottom right.

A red arrow points from the 'Search Item' dropdown in the filters to the 'Add >' button.

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2209	Smart Water	\$ 2.99	-	-
<input type="checkbox"/> 2012	CIROC WATERMELON	\$ 38.99	750 ML	-
<input type="checkbox"/> 1752	HAMPTON WATER ROSE	\$ 24.99	750 ML	-
<input type="checkbox"/> 1658	SMIRNOFF WATERMELON	\$ 22.99	1.75 L	-
<input type="checkbox"/> 1625	JOSE CUERVO WATERMELON MARGARI	\$ 21.99	-	-
<input type="checkbox"/> 1538	CIROC WATERMELON	\$ 19.99	375 ML	-
<input type="checkbox"/> 1495	HELL OR HIGH	\$ 19.99	-	12-PACK

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4.5.4 Back Office - Select an Item in Item Group

- To select an item you wish to add to an item group, click on the **checkbox** next to item name
- A **check mark** confirms the item is selected

The screenshot shows the 'Add Item Group' interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, and Bulk Changes. The main area has a form for 'Item Group Name' (Water), 'Select Message', and 'Is Favourite'. Below is a 'Filters' section with 'Search Item' (water), 'Select Department', 'Select Category', 'Select Size', 'Select Pack', and 'Select Brand'. A table lists items with columns: SKU, Item Name, Price (\$), Size, and Pack. The table shows 28 items. A red arrow points to the checkbox next to '2012 CIROC WATERMELON'. To the right of the table are buttons: 'Add >', 'Add All >', '< Remove', and '< Remove All'. A 'Save' button is at the bottom right.

SKU	Item Name	Price (\$)	Size	Pack
2209	Smart Water	\$ 2.99	-	-
<input checked="" type="checkbox"/> 2012	CIROC WATERMELON	\$ 38.99	750 ML	-
<input type="checkbox"/> 1752	HAMPTON WATER ROSE	\$ 24.99	750 ML	-
<input type="checkbox"/> 1058	SMIRNOFF WATERMELON	\$ 22.99	1.75 L	-
<input type="checkbox"/> 1625	JOSE CUERVO WATERMELON MARGARI	\$ 21.99	-	-
<input type="checkbox"/> 1538	CIROC WATERMELON	\$ 19.99	375 ML	-
<input type="checkbox"/> 1495	HELL OR HIGH	\$ 19.99	-	12-PACK

4.5.5 Back Office - Add Items into Item Group

To add items to an item group, click **Add**

The screenshot shows the 'Add Item Group' interface, similar to the previous one. In this view, the 'Add >' button is highlighted with a red arrow, indicating it should be clicked to add the selected items to the group. The table shows the same items, with the '2012 CIROC WATERMELON' item still selected. The 'Add >' button is located to the right of the table, above the 'Add All >' button.

4.5.6 Back Office - Select Items for Removal from Item Group

To select an item you wish to remove from an item group, click on the **checkbox** next to item name

Edit Item Group

Item Group Name: Water Select Message ☐ Is Favourite

Filters

Search Item Select Department Select Category Select Size Select Pack Select Brand

Total Items Counts : 2201

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2210	La Rosa Candle	\$ 15.99	-	-
<input type="checkbox"/> 2208	9.56 Item	\$ 9.56	-	-
<input type="checkbox"/> 2165	MACALLAN DOUBLE 12YR	\$ 110.99	750 ML	-
<input type="checkbox"/> 2037	BUFFALO TRACE	\$ 43.85	750 ML	-
<input type="checkbox"/> 847	AMERICAN SPIRIT ORG FULL	\$ 12.89	-	-
<input type="checkbox"/> 846	AMERICAN SPIRIT MEN LIGHT	\$ 12.89	-	-
<input type="checkbox"/> 845	AMERICAN SPIRIT YELLOW	\$ 12.89	-	-
<input type="checkbox"/> 844	AMERICAN SPIRIT	\$ 12.89	-	-

Total Items Counts : 5 ☒ For Sequence

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2209	Smart Water	2.99	-	-
<input checked="" type="checkbox"/> 2012	CIROC WATERMELON	36.99	750 ML	-
<input checked="" type="checkbox"/> 1752	HAMPTON WATER ROSE	24.99	750 ML	-
<input checked="" type="checkbox"/> 1658	SMIRNOFF WATERMELON	22.99	1.75 L	-
<input checked="" type="checkbox"/> 1625	JOSE CUERVO WATERMELON MARGARI	21.99	-	-

Buttons: Add, Add All, Remove, Remove All

Save

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4.5.7 Back Office - Remove Items from Item Group

To remove items from an item group, click **Remove**

Edit Item Group

Item Group Name: Water Select Message ☐ Is Favourite

Filters

Search Item Select Department Select Category Select Size Select Pack Select Brand

Total Items Counts : 2201

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2210	La Rosa Candle	\$ 15.99	-	-
<input type="checkbox"/> 2208	9.56 Item	\$ 9.56	-	-
<input type="checkbox"/> 2165	MACALLAN DOUBLE 12YR	\$ 110.99	750 ML	-
<input type="checkbox"/> 2037	BUFFALO TRACE	\$ 43.85	750 ML	-
<input type="checkbox"/> 847	AMERICAN SPIRIT ORG FULL	\$ 12.89	-	-
<input type="checkbox"/> 846	AMERICAN SPIRIT MEN LIGHT	\$ 12.89	-	-
<input type="checkbox"/> 845	AMERICAN SPIRIT YELLOW	\$ 12.89	-	-
<input type="checkbox"/> 844	AMERICAN SPIRIT	\$ 12.89	-	-

Total Items Counts : 5 ☒ For Sequence

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2209	Smart Water	2.99	-	-
<input checked="" type="checkbox"/> 2012	CIROC WATERMELON	36.99	750 ML	-
<input checked="" type="checkbox"/> 1752	HAMPTON WATER ROSE	24.99	750 ML	-
<input checked="" type="checkbox"/> 1658	SMIRNOFF WATERMELON	22.99	1.75 L	-
<input checked="" type="checkbox"/> 1625	JOSE CUERVO WATERMELON MARGARI	21.99	-	-

Buttons: Add, Add All, Remove, Remove All

Save

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4.5.8 Back Office - Remove All Items in Item Group

To remove all items from an item group, click **Remove All**

The screenshot shows the 'Edit Item Group' interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group (selected), Item Size, Item History, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, and Bulk Changes. The main area is titled 'Edit Item Group' and contains a form with fields for 'Item Group Name' (Water), 'Select Message', and 'Is Favourite'. Below the form are filters for 'Search Item' (water), 'Select Department', 'Select Category', 'Select Size', 'Select Pack', and 'Select Brand'. There are two tables displaying item counts. The left table, 'Total Items Counts : 23', lists items with checkboxes, SKUs, item names, prices, sizes, and packs. The right table, 'Total Items Counts : 5', lists items with checkboxes, SKUs, item names, prices, sizes, and packs. A red arrow points to the 'Remove All' button in the center of the interface.

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2209	Smart Water	\$ 2.99	-	-
<input type="checkbox"/> 1538	CIROC WATERMELON	\$ 10.99	375 ML	-
<input type="checkbox"/> 1495	HELL OR HIGH WATERMELON C	\$ 10.99	-	12-PACK
<input type="checkbox"/> 1403	CUTWATER TEQUILA MIX	\$ 18.99	-	6-PACK
<input type="checkbox"/> 1353	OSENA COCONUT WATER MIX	\$ 17.99	-	8-PACK
<input type="checkbox"/> 1319	SMIRNOFF WATERMELON 750	\$ 16.99	-	-
<input type="checkbox"/> 1112	NEWMAMSTERDAM WATERMELON	\$ 14.99	750 ML	-

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2209	Smart Water	2.99	-	-
<input type="checkbox"/> 2012	CIROC WATERMELON	\$ 38.99	750 ML	-
<input type="checkbox"/> 1752	HAMPTON WATER ROSE	\$ 24.99	750 ML	-
<input type="checkbox"/> 1658	SMIRNOFF WATERMELON	\$ 22.99	1.75 L	-
<input type="checkbox"/> 1625	JOSE CUERVO WATERMELON MARGARI	\$ 21.99	-	-

4.5.9 Back Office - Item Group Shortcut Buttons

To create Item Group shortcut buttons on your register screen, select **Is Favorite**

The screenshot shows the 'Edit Item Group' interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group (selected), Item Size, Item History, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, and Bulk Changes. The main area is titled 'Edit Item Group' and contains a form with fields for 'Item Group Name' (Water), 'Select Message', and 'Is Favourite'. Below the form are filters for 'Search Item', 'Select Department', 'Select Category', 'Select Size', 'Select Pack', and 'Select Brand'. There are two tables displaying item counts. The left table, 'Total Items Counts : 2205', lists items with checkboxes, SKUs, item names, prices, sizes, and packs. The right table, 'Total Items Counts : 1', lists items with checkboxes, SKUs, item names, prices, sizes, and packs. A red arrow points to the 'Is Favourite' checkbox in the top right corner of the form.

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2210	La Rosa Candle	\$ 15.99	-	-
<input type="checkbox"/> 2208	9.56 Item	\$ 9.56	-	-
<input type="checkbox"/> 2165	MACALLAN DOUBLE 12YR	\$ 110.99	750 ML	-
<input type="checkbox"/> 2037	BUFFALO TRACE	\$ 43.95	750 ML	-
<input type="checkbox"/> 847	AMERICAN SPIRIT ORG FULL	\$ 12.88	-	-
<input type="checkbox"/> 846	AMERICAN SPIRIT MEN LIGHT	\$ 12.88	-	-
<input type="checkbox"/> 845	AMERICAN SPIRIT YELLOW	\$ 12.88	-	-
<input type="checkbox"/> 844	AMERICAN SPIRIT	\$ 12.88	-	-

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2209	Smart Water	2.99	-	-

4.5.10 Back Office - Save Item Group

To save your item group, click **Save**

Edit Item Group

Item Group Name: Select Message ☐ Is Favourite

Filters

Search Item Select Department Select Category Select Size Select Pack Select Brand

Total Items Counts : 2205

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2210	La Rosa Candle	\$ 15.99	-	-
<input type="checkbox"/> 2208	9.56 Item	\$ 9.56	-	-
<input type="checkbox"/> 2165	MACALLAN DOUBLE 12YR	\$ 110.99	750 ML	-
<input type="checkbox"/> 2037	BUFFALO TRACE	\$ 43.85	750 ML	-
<input type="checkbox"/> 847	AMERICAN SPIRIT ORG FULL	\$ 12.89	-	-
<input type="checkbox"/> 846	AMERICAN SPIRIT MEN LIGHT	\$ 12.89	-	-
<input type="checkbox"/> 845	AMERICAN SPIRIT YELLOW	\$ 12.89	-	-
<input type="checkbox"/> 844	AMERICAN SPIRIT	\$ 12.89	-	-

Total Items Counts : 1 ☐ For Sequence

SKU	Item Name	Price (\$)	Size	Pack
<input type="checkbox"/> 2209	Smart Water	2.99	-	-

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4.5.11 Back Office - Edit Item Group

To edit an existing item group, hover over the item group and select the **green** edit button

Item Group

Total: 4 Page Size: 50

Group Name	Message	Group Type
<input type="checkbox"/> Lotto	-	Is Favorite
<input type="checkbox"/> Redbull	-	Is Favorite
<input type="checkbox"/> Bud Products	-	Is Favorite
<input type="checkbox"/> Water	-	-

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4.5.12 Back Office - Deactivate Item Group

To deactivate an item group, hover over the item group and click the **blue** slider

The screenshot shows the 'Item Group' management interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, and Bulk Changes. The main area displays a table with columns: Group Name, Message, and Group Type. The table lists four item groups: Lotto, Redbull, Bud Products, and Water. Each row has a checkbox and a status indicator (green dot for Active, red dot for In-Active). The 'Water' row is highlighted in blue. To the right of the 'Water' row, there is a set of action icons: a blue slider, a green checkmark, a red X, and a trash can. A red arrow points from the bottom left towards the blue slider icon. Above the table, there are buttons for 'Add', 'Active', 'In-Active', 'Save Sequence', and a trash can icon, along with a 'Total: 4' indicator. The top right shows 'Page Size: 50' and status legends for 'Active' and 'In-Active'. The footer contains the copyright notice: 'Copyright © 2023 RetailPOS. All rights reserved.'

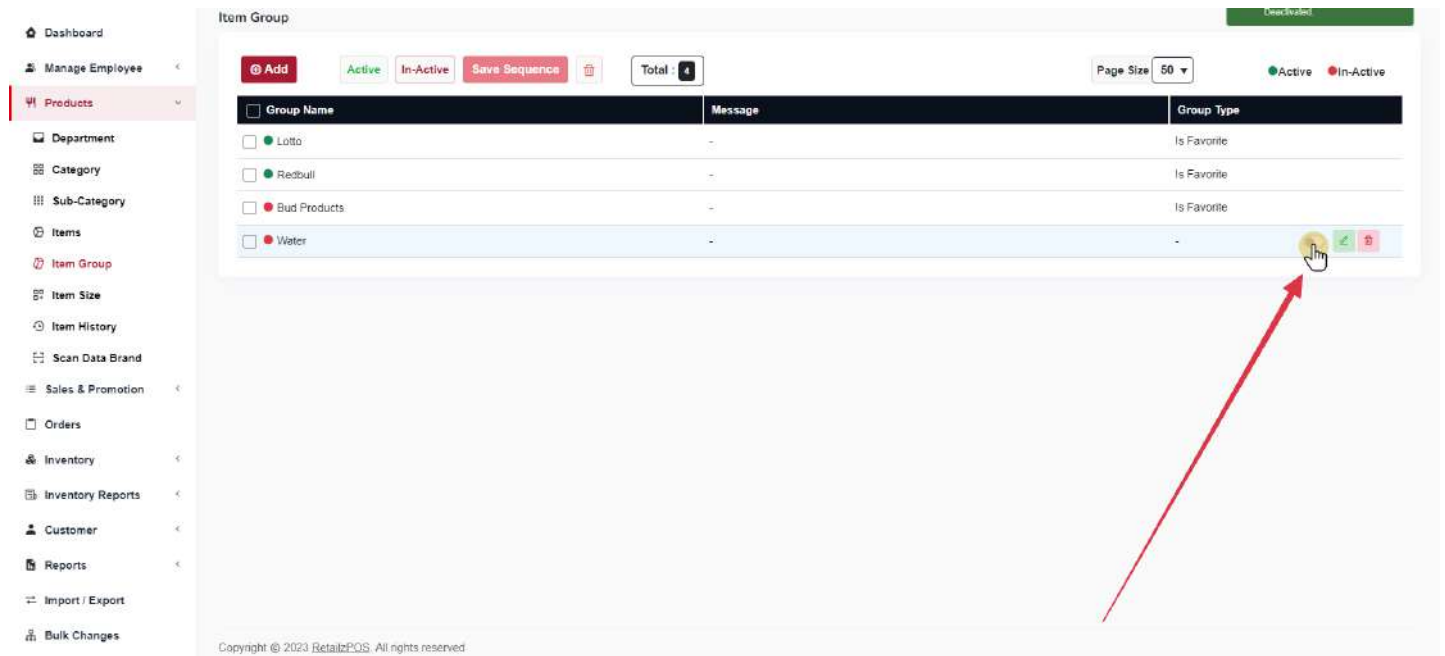
4.5.13 Back Office - Confirm Deactivate Item Group

To confirm item group deactivation, click **YES**

This screenshot shows the same 'Item Group' management interface as the previous one, but with an 'Alert' dialog box open in the center. The dialog box contains the text: 'Alert' and 'Are you sure want to set the Item Group as Deactive?'. It has two buttons: 'YES' (yellow) and 'NO' (red). A red arrow points from the bottom left towards the 'YES' button. The background interface is dimmed, showing the same table and navigation sidebar. The footer contains the copyright notice: 'Copyright © 2023 RetailPOS. All rights reserved.'

4.5.14 Back Office - Activate Item Group

To activate an item group, hover over the item group and click the **blue** slider

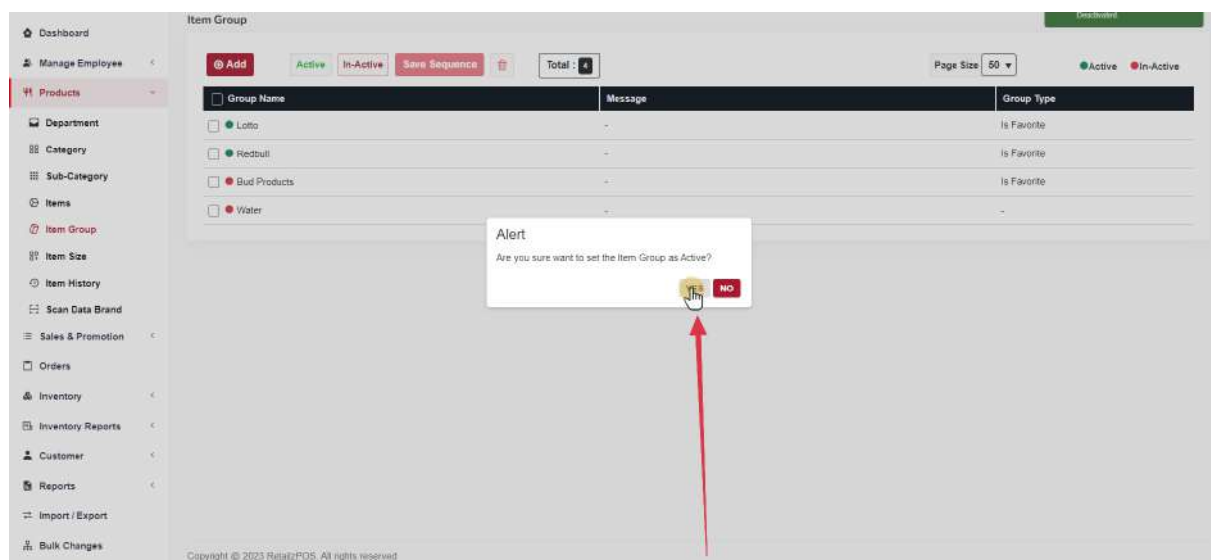


The screenshot displays the 'Item Group' management page. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, and Bulk Changes. The main content area shows a table with columns: Group Name, Message, and Group Type. The table lists four item groups: Lotto, Redbull, Bud Products, and Water. Each row has a checkbox and a status indicator (green dot for Active, red dot for In-Active). The 'Water' row is highlighted, and a red arrow points to the blue slider icon in the action column. Above the table are buttons: Add, Active, In-Active, Save Sequence, and a trash icon. A 'Total: 4' badge is also present. The page size is set to 50. The status 'Deactivated' is shown in the top right corner.

Group Name	Message	Group Type
<input type="checkbox"/> Lotto	-	Is Favorite
<input type="checkbox"/> Redbull	-	Is Favorite
<input type="checkbox"/> Bud Products	-	Is Favorite
<input type="checkbox"/> Water	-	-

4.5.15 Back Office - Confirm Activate Item Group

To confirm item group activation, click **YES**



The screenshot shows the same 'Item Group' management page as before, but with an alert dialog box open in the center. The alert text reads: 'Alert. Are you sure want to set the Item Group as Active?'. There are two buttons: 'YES' (highlighted with a red arrow) and 'NO'. The background is dimmed.

Group Name	Message	Group Type
<input type="checkbox"/> Lotto	-	Is Favorite
<input type="checkbox"/> Redbull	-	Is Favorite
<input type="checkbox"/> Bud Products	-	Is Favorite
<input type="checkbox"/> Water	-	-

4.5.16 Back Office - Delete Item Group

To delete a item group, hover over the item group and click the **red** trash can button

The screenshot shows the 'Item Group' management page. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products (selected), Department, Category, Sub-Category, Items, Item Group, Item Size, Item History, Scan Data Brand, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, and Bulk Changes. The main area displays a table of item groups. The table has columns: Group Name, Message, and Group Type. The rows are: Lotto (Is Favorite), Redbull (Is Favorite), Bud Products (Is Favorite), and Water (Is Favorite). Above the table are buttons: Add, Active, In-Active, Save Sequence, and a trash can icon. A 'Total: 4' badge is also present. A red arrow points from the bottom right towards the red trash can icon in the 'Water' row's action column.

Group Name	Message	Group Type
Lotto	-	Is Favorite
Redbull	-	Is Favorite
Bud Products	-	Is Favorite
Water	-	-

4.5.17 Back Office - Confirm Item Group Deletion

To confirm you would like to delete this item group, click **YES**

The screenshot shows the same 'Item Group' management page as before, but with a confirmation alert dialog box open in the center. The dialog box has the title 'Alert' and the text 'Are You Sure want to delete this Item Group?'. It contains two buttons: 'YES' (highlighted with a yellow background) and 'NO' (red background). A red arrow points from the bottom towards the 'YES' button.

Group Name	Message	Group Type
Lotto	-	Is Favorite
Redbull	-	Is Favorite
Bud Products	-	Is Favorite
Water	-	-

4.6 Back Office - Item History

Under the Product Module, click on **Item History** to bring up your stores item history

Transaction History

Receipt Number	Register No	Price	Qty	Total Amount	Customer Name
440I- 20230328000725044	44	\$ 18.99	1	\$ 20.37	
440I- 20230327235758001	44	\$ 62.96	4	\$ 67.52	
440I- 20230327235656665	44	\$ 410.85	8	\$ 418.82	
410I- 20230327064134507	0	\$ 110.00	1	\$ 110.00	
410I- 20230327060627072	1778	\$ 110.00	1	\$ 107.25	
410I- 20230327060627072	0	\$ 110.00	1	\$ 107.25	
410I- 20230327060010244	0	\$ 110.00	1	\$ 82.50	
410I- 20230327065850464	0	\$ 330.00	3	\$ 330.00	

RECEIPT VIEW
Demo Store
Griffin
PHONE : (997) 815-9005
Sales Date : Mar 28, 2023 12:07 AM
POS Orderid : 440I-20230328000725044
Register No. : 44

Name	Qty	Price
1800 RASPBERRY MARGARITA	1	\$ 18.99
SubTotal :		\$ 18.99
Discount :		\$ 0.00
Sales Tax :		\$ 1.38
Surcharge :		\$ 0.00
Total		\$ 20.37
Change Due		\$ 0.00
Grand Total		\$ 20.37

Other Details

CARD	\$ 20.98
Auth Code	000000
Card No	**** *00 7786
Card Type	VISA
CashBack	\$ 0.00
Merchant Fee	\$ 0.61

4.6.1 Back Office - Search Item Transaction History

To find item history, you can filter by **searching item names**

Transaction History

Search Item Name: 1800 RASPBERRY MARGARITA

Qty	Total Amount	Customer Name
1	\$ 20.37	
5	\$ 418.82	

RECEIPT VIEW
Demo Store
Griffin
PHONE : (997) 815-9005
Sales Date : Mar 28, 2023 12:07 AM
POS Orderid : 440I-20230328000725044
Register No. : 44

Name	Qty	Price
1800 RASPBERRY MARGARITA	1	\$ 18.99
SubTotal :		\$ 18.99
Discount :		\$ 0.00
Sales Tax :		\$ 1.38
Surcharge :		\$ 0.00
Total		\$ 20.37
Change Due		\$ 0.00
Grand Total		\$ 20.37

Other Details

CARD	\$ 20.98
Auth Code	000000
Card No	**** *00 7786
Card Type	VISA
CashBack	\$ 0.00
Merchant Fee	\$ 0.61

4.6.2 Back Office - View All Item Transaction History

To view all item transactions history, click **ALL**

Transaction History

Search Item Name: Select Department: Select Category:

Select Sub Category: Select Brand: Select Item Size:

Select Item Type: Select Date Range:

Transaction History

ALL REFUND PARTIAL RETURN DISCOUNTED Select Register

Receipt Number	Register No	Price	Qty	Total Amount	Customer Name
44OI-20230328000725044	44	\$ 18.99	1	\$ 20.37	
44OI-20230327235759001	44	\$ 62.96	4	\$ 67.52	
44OI-20230327235856665	44	\$ 410.95	8	\$ 416.82	
41OI-20230327064134507	0	\$ 110.00	1	\$ 110.00	
41OI-20230327060627072	1778	\$ 110.00	1	\$ 107.25	
41OI-20230327060627072	0	\$ 110.00	1	\$ 107.25	
41OI-20230327060010244	0	\$ 110.00	1	\$ 82.50	
41OI-20230327055850484	0	\$ 330.00	3	\$ 330.00	

RECEIPT VIEW

Demo Store
Griffin
PHONE : (997) 815-9005

Sales Date : Mar 28, 2023 12:07 AM
POS Orderid : 44OI-20230328000725044
Register No. : 44

Name	Qty	Price
1800 RASPBERRY MARGARITA	1	\$ 18.99
SubTotal :		\$ 18.99
Discount :		\$ 0.00
Sales Tax :		\$ 1.38
Surcharge :		\$ 0.00
Total		\$ 20.37
Change Due		\$ 0.00
Grand Total		\$ 20.37

Other Details

CARD \$ 20.98
Auth Code 000060
Card No **** *00 7786
Card Type VISA
CashBack \$ 0.00

4.6.3 Back Office - View Refunded Item History

To view refunded item history, click **REFUND**

Transaction History

Search Item Name: Select Department: Select Category:

Select Sub Category: Select Brand: Select Item Size:

Select Item Type: Select Date Range:

Transaction History

ALL REFUND PARTIAL RETURN DISCOUNTED Select Register

Receipt Number	Register No	Price	Qty	Total Amount	Customer Name
40OI-20230328031317344	40	\$ 15.00	1	\$ 32.18	
40OI-20230328031411070	40	\$ 5.99	4	\$ 25.98	
40OI-20230328031099653	40	\$ 15.00	1	\$ 277.54	
40OI-20230328031909653	40	\$ 59.99	1	\$ 277.54	
40OI-20230328031909653	40	\$ 59.99	3	\$ 277.54	
40OI-20230327004725067	40	\$ 2.00	1	\$ 3355.01	
40OI-20230327004725067	40	\$ 2.00	4	\$ 3355.01	
40OI-20230327004725067	40	\$ 15.00	1	\$ 3355.01	

RECEIPT VIEW

Demo Store
Griffin
PHONE : (997) 815-9005

Sales Date : Mar 26, 2023 03:13 AM
POS Orderid : 40OI-20230328031317344
Register No. : 40

Name	Qty	Price
MAG12 CYCLE OIL B 1	1	\$ 500.00
fatttt boy	-1	\$ -15.00
fatttt boy	-1	\$ -15.00
Sub Total :		\$ 470.00
Discount :		\$ 0.00
Sales Tax :		\$ -2.18
Surcharge :		\$ 0.00
Total		\$ 467.82
Change Due		\$ 0.00
Grand Total		\$ 467.82

Other Details

CARD \$ 599.36
Auth Code 000000
Card No **** *00 3142
Card Type MASTERCARD

4.6.4 Back Office - View Partial Return Item History

To view partial return item history, click **PARTIAL RETURN**

Transaction History

ALL REFUND **PARTIAL RETURN** DISCOUNTED Select Register

Receipt Number	Register No	Price	Qty	Total Amount	Customer Name
400I-20230325071232013		\$ 1.00	1	\$ 363.06	
400I-20230325071232013	40	\$ 5.99	1	\$ 363.06	
400I-20230325071232013	40	\$ 15.99	1	\$ 363.06	
400I-20230325071232013	40	\$ 16.99	1	\$ 363.06	
400I-20230325071232013	40	\$ 24.99	1	\$ 363.06	
400I-20230325071232013	40	\$ 89.99	3	\$ 363.06	
400I-20230325225501318	40	\$ 1.54	3	\$ 1234.50	
400I-20230325225501318	40	\$ 45.75	3	\$ 1234.50	

RECEIPT VIEW
Demo Store
Griffin
PHONE : (997) 815-9005
Sales Date : Mar 25, 2023 07:12 AM
POS Orderid : 400I-20230325071232013
Register No. : 40

Name	Qty	Price
E & J 1.75 L	1	\$ 24.99
DELEON DIAMANTE 750 mL	3	\$ 289.97
LIME TWISTED	1	\$ 5.99
MYERS'S RUM	1	\$ 16.99
ORIGINAL DARK 750 mL	1	\$ 10.99
SMIRN CITRUS 1000 ML	1	\$ 15.99
NEW AMSTERDAM	1	\$ 1.00
CAPTAIN MORGAN	1	\$ 18.99
E & J 1.75 L	-1	\$ -24.99
DELEON DIAMANTE 750 mL	-3	\$ -289.97
LIME TWISTED	-1	\$ -5.99

4.6.5 Back Office - View Discounted Item History

To view discounted item history, click **DISCOUNTED**

Transaction History

ALL REFUND PARTIAL RETURN **DISCOUNTED** Select Register

Receipt Number	Register No	Price	Qty	Total Amount	Customer Name
230I-20230217015217304	0	\$ 500.00	1	\$ 500.00	
400I-20230325071232013	40	\$ 5.99	1	\$ 343.77	
400I-20230325071232013	40	\$ 15.99	1	\$ 343.77	
400I-20230325071232013	40	\$ 18.99	1	\$ 343.77	
400I-20230325071232013	40	\$ 24.99	1	\$ 343.77	
400I-20230325071232013	40	\$ 89.99	3	\$ 343.77	
400I-20230325072020205	40	\$ 24.99	2	\$ 53.60	
400I-20230325222305113	40	\$ 2.36	1	\$ 81.82	

RECEIPT VIEW
Demo Store
Griffin
PHONE : (997) 815-9005
Sales Date : Feb 17, 2023 02:52 AM
POS Orderid : 230I-20230217015217304
Register No. : 1440

Name	Qty	Price
non revenue	-1	\$ -500.00
Sub Total :		\$ -500.00
Discount :		\$ 0.00
Sales Tax :		\$ 0.00
Surcharge :		\$ 0.00
Total		\$ -500.00
Change Due		\$ 0.00
Grand Total		\$ -500.00

CASH \$ -500.00

4.6.6 Back Office - Item History by Register

To view history by register, click on **SELECT REGISTER** and chose from the drop down menu

Transaction History

Search Item Name: 1800 RASPBERRY MARGARITA | Select Department | Select Category | Select Sub Category | Select Brand | Select Item Size | Select Item Type | Select Date Range

Receipt Number	Register No	Price	Qty
23OI-20230217015217304	0	\$ 500.00	1
40OI-20230325071232013	40	\$ 5.99	1
40OI-20230325071232013	40	\$ 15.99	1
40OI-20230325071232013	40	\$ 16.99	1
40OI-20230325071232013	40	\$ 24.99	1
40OI-20230325071232013	40	\$ 89.99	3
40OI-20230325072020205	40	\$ 24.99	2
40OI-2023032522305113	40	\$ 2.38	1

RECEIPT VIEW
Demo Store
Griffin
PHONE : (997) 815-9005
Sales Date : Feb 17, 2023 02:52 AM
POS Orderid : 23OI-20230217015217304
Register No. : 1440

Name	Qty	Price
non revenue	-1	\$ -500.00
SubTotal :		\$ -500.00
Discount :		\$ 0.00
Sales Tax :		\$ 0.00
Surcharge :		\$ 0.00
Total		\$ -500.00
Change Due		\$ 0.00
Grand Total		\$ -500.00

CASH \$ -500.00

4.6.7 Back Office - View Item Purchase History

To view item purchase history, click **Purchase History**

Purchase History

Search Item Name | Select Department | Select Category | Select Sub Category | Select Brand | Select Item Size | Select Item Type | Select Date Range

Average Cost (\$): 5.99 | Average Price (\$): 0.00 | Average Qty: 30

Invoice No	Invoice Date	Committed Date	Qty	Cost	Price	Distributor Name	Date Paid	Payment Type
1234	Mar 30, 2023	Mar 30, 2023	25	\$ 0.00	\$ 0.00		Mar 30, 2023	-
75756	Mar 24, 2023	Mar 24, 2023	0	\$ 0.00	\$ 0.00		Mar 24, 2023	-
1	Jan 17, 2023	Jan 17, 2023	5	\$ 5.99	\$ 0.00		Jan 17, 2023	-

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4.6.8 Back Office - View Price/Cost/Qty Change Item History

To view price/cost/qty change history, click **Price/Cost/Qty Change**

The screenshot shows the Back Office interface. On the left sidebar, the 'Products' menu is expanded, and 'Price/Cost/Qty Change' is highlighted with a red arrow. The main content area displays a search form with fields for 'Search Item Name', 'Select Department', 'Select Category', 'Select Sub Category', 'Select Brand', 'Select Item Size', 'Select Item Type', and 'Select Date Range'. Below the search form, the 'Price/Cost/Qty Change' section is active, showing tabs for 'PRICE', 'COST', and 'QTY'. The 'PRICE' tab is selected, displaying a table with the following columns: 'OLD UNIT PRICE', 'NEW UNIT PRICE', 'PERCENTAGE', 'OLD CASE PRICE', 'NEW CASE PRICE', and 'MODULE'. The table is currently empty.

4.6.9 Back Office - View Item Price History

To view item price history, click **PRICE**

The screenshot shows the Back Office interface. On the left sidebar, the 'Products' menu is expanded, and 'Price/Cost/Qty Change' is highlighted with a red arrow. The main content area displays the same search form as in the previous screenshot. Below the search form, the 'Price/Cost/Qty Change' section is active, and the 'PRICE' tab is selected. The table below the tabs shows the following columns: 'OLD UNIT PRICE', 'NEW UNIT PRICE', 'PERCENTAGE', 'OLD CASE PRICE', 'NEW CASE PRICE', and 'MODULE'. The table is currently empty.

4.6.10 Back Office - View Item Cost History

To view item cost history, click **COST**

Dashboard

- Manage Employee
- Products**
 - Department
 - Category
 - Sub-Category
 - Items
 - Item Group
 - Item Size
 - Item History**
 - Scan Data Brand
 - Sales & Promotion
 - Orders
 - Inventory
 - Inventory Reports
 - Customer
 - Reports
 - Import / Export
 - Bulk Changes

Transaction History

- Purchase History
- Price/Cost/Qty Change**

Search Item Name

Select Department

Select Category

Select Sub Category

Select Brand

Select Item Size

Select Item Type

Select Date Range

Price/Cost/Qty Change

PRICE **COST** QTY

OLD UNIT PRICE	NEW UNIT PRICE	PERCENTAGE	OLD CASE PRICE	NEW CASE PRICE	MODULE
----------------	----------------	------------	----------------	----------------	--------

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4.6.11 Back Office - View Item Quantity History

To view item quantity history, click **QTY**

Dashboard

- Manage Employee
- Products**
 - Department
 - Category
 - Sub-Category
 - Items
 - Item Group
 - Item Size
 - Item History**
 - Scan Data Brand
 - Sales & Promotion
 - Orders
 - Inventory
 - Inventory Reports
 - Customer
 - Reports
 - Import / Export
 - Bulk Changes

Transaction History

- Purchase History
- Price/Cost/Qty Change**

Search Item Name

Select Department

Select Category

Select Sub Category

Select Brand

Select Item Size

Select Item Type

Select Date Range

Price/Cost/Qty Change

PRICE COST **QTY**

OLD UNIT PRICE	NEW UNIT PRICE	PERCENTAGE	OLD CASE PRICE	NEW CASE PRICE	MODULE
----------------	----------------	------------	----------------	----------------	--------

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4.7 Back Office - Quick Add Item

To open quick add item, click on **Quick Add Item** under the products tab

The screenshot shows the 'Quick Add Item' form in the Back Office. The left sidebar has the 'Products' tab selected, and 'Quick Add Item' is highlighted. A red arrow points from the sidebar to the 'Quick Add Item' button in the main form area. The form contains various input fields for item details like UPC, Item Name, Category, and pricing.

4.7.1 Back Office - Quick Add Item UPC

When entering quick inventory, begin with scanning or auto generating the item **UPC**

The screenshot shows the 'Quick Add Item' form in the Back Office, focusing on the UPC field. A red arrow points to the 'UPC' input field, which is highlighted with a yellow circle. The 'Auto Generate UPC' button is also visible next to the input field.

4.7.2 Back Office - Quick Add Item Name

When entering quick inventory, provide an **Item Name**

Quick Add Item

UPC * **Auto Generate UPC** SKU Unit Cost (\$) Buy Down (\$) Retail Price (\$)

Item Name * Select Department CC Price (\$) Margin (%) Markup (%)

Select Category Select Item Size Select Item Pack

Select Item Group Quantity On Store ☒ ☐

☐ Non Taxable ☒ TAX1(7 %)

Select Age

☐ Open Price ☐ EBT

☐ By As Case

Unit In Case

Case Cost (\$)

Reset **Save**

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4.7.3 Back Office - Quick Add Item Department

When entering quick inventory, select the item **department**

Quick Add Item

UPC * **Auto Generate UPC** SKU Unit Cost (\$) Buy Down (\$) Retail Price (\$)

Item Name * Select Department CC Price (\$) Margin (%) Markup (%)

Select Category Select Item Size Select Item Pack

Select Item Group Quantity On Store ☒ ☐

☐ Non Taxable ☒ TAX1(7 %)

Select Age

☐ Open Price ☐ EBT

☐ By As Case

Unit In Case

Case Cost (\$)

Reset **Save**

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4.7.4 Back Office - Quick Add Item Unit Cost

When entering quick inventory, input the correct **unit cost** per item

Quick Add Item

UPC * 37815217927 **Auto Generate UPC** SKU Unit Cost (\$)

Item Name * Water Select Department Cigs Buy Down (\$) Retail Price (\$)

Select Category CC Price (\$) Margin (%) Markup (%)

Select Item Group Select Item Size Select Item Pack

Quantity On Store

Select Age

Tax: * ☐ Non Taxable ☒ TAX1(7 %)

☐ Open Price ☐ EBT

☐ By As Case Unit In Case:

Case Cost (\$)

Reset Save

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4.7.5 Back Office - Quick Add Item Retail Price

When entering quick inventory, input the correct **retail price** per item

Quick Add Item

UPC * 37815217927 **Auto Generate UPC** SKU Unit Cost (\$)

Item Name * Water Select Department Cigs Buy Down (\$) Retail Price (\$)

Select Category CC Price (\$) Margin (%) Markup (%)

Select Item Group Select Item Size Select Item Pack

Quantity On Store

Select Age

Tax: * ☐ Non Taxable ☒ TAX1(7 %)

☐ Open Price ☐ EBT

☐ By As Case Unit In Case:

Case Cost (\$)

Reset Save

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4.7.6 Back Office - Quick Add Item Quantity On Store

When entering quick inventory, provide the correct **Quantity on Store**

Quick Add Item

UPC * 37815217927 **Auto Generate UPC** SKU Unit Cost (\$) Buy Down (\$) Retail Price (\$)

Item Name * Water Select Department Cigs CC Price (\$) Margin (%) Markup (%)

Select Category Select Item Size Select Item Pack

Select Item Group

Tax: * ☐ Non Taxable ☒ TAX1(7 %)

Quantity On Store **Save**

Select Age

☐ Open Price ☐ EBT

☐ By As Case Unit In Case:

Case Cost (\$)

Reset **Save**

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4.7.7 Back Office - Quick Add Item Save Item

To confirm your quick inventory item, click **Save**

Quick Add Item

UPC * 37815217927 **Auto Generate UPC** SKU Unit Cost (\$) Buy Down (\$) Retail Price (\$)

Item Name * Water Select Department Cigs CC Price (\$) Margin (%) Markup (%)

Select Category Select Item Size Select Item Pack

Select Item Group

Tax: * ☐ Non Taxable ☒ TAX1(7 %)

Quantity On Store **Save**

Select Age

☐ Open Price ☐ EBT

☐ By As Case Unit In Case:

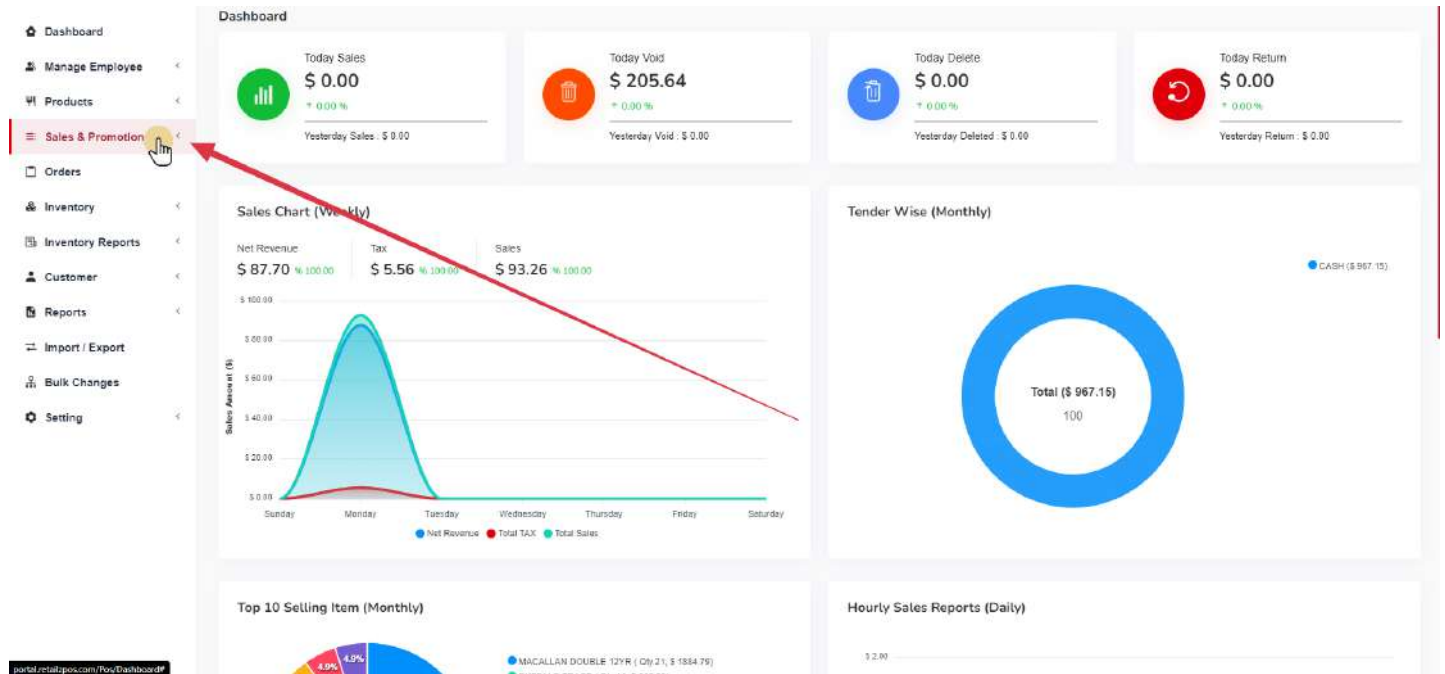
Case Cost (\$)

Reset **Save**

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5 Back Office - Sales & Promotion Module

From the RetailzPOS **Back Office**, click **Sales & Promotion** to access your store promotion module



5.1 Back Office - Discount

Under the Sales & Promotions module, click on **Discount** to bring up your stores discount list

The screenshot displays the RetailzPOS Back Office Discount module. The sidebar on the left contains the following menu items: Dashboard, Manage Employee, Products, **Sales & Promotion** (highlighted with a red arrow), Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main content area shows the Discount module with the following table:

Discount Name	Discount Type	Value	Is Standard	Discount Apply
5% off	Percentage %	5.00 %	true	Before Tax
1\$ off	Price \$	\$ 1.00	true	Before Tax
10% off	Percentage %	10.00 %	true	Before Tax

The footer shows the URL 'portal.retailzpos.com/Pos/Discounts'. A copyright notice at the bottom reads: 'Copyright © 2023 RetailzPOS. All rights reserved.'

5.1.1 Back Office - Create a New Discount

To create a new discount, click **Add**

The screenshot shows the 'Discount' management page in the Back Office. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products, Sales & Promotion (selected), Discount, Mix & Match, BOGO, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main content area is titled 'Discount' and features an 'Add' button (highlighted with a red arrow), 'Active' and 'In-Active' status filters, and a 'Total: 3' indicator. Below these is a table of existing discounts:

<input type="checkbox"/>	Discount Name	Discount Type	Value	Is Standard	Discount Apply
<input type="checkbox"/>	5% off	Percentage %	5.00 %	true	Before Tax
<input type="checkbox"/>	\$1 off	Price \$	\$ 1.00	true	Before Tax
<input type="checkbox"/>	10% off	Percentage %	10.00 %	true	Before Tax

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5.1.2 Back Office - Discount Name

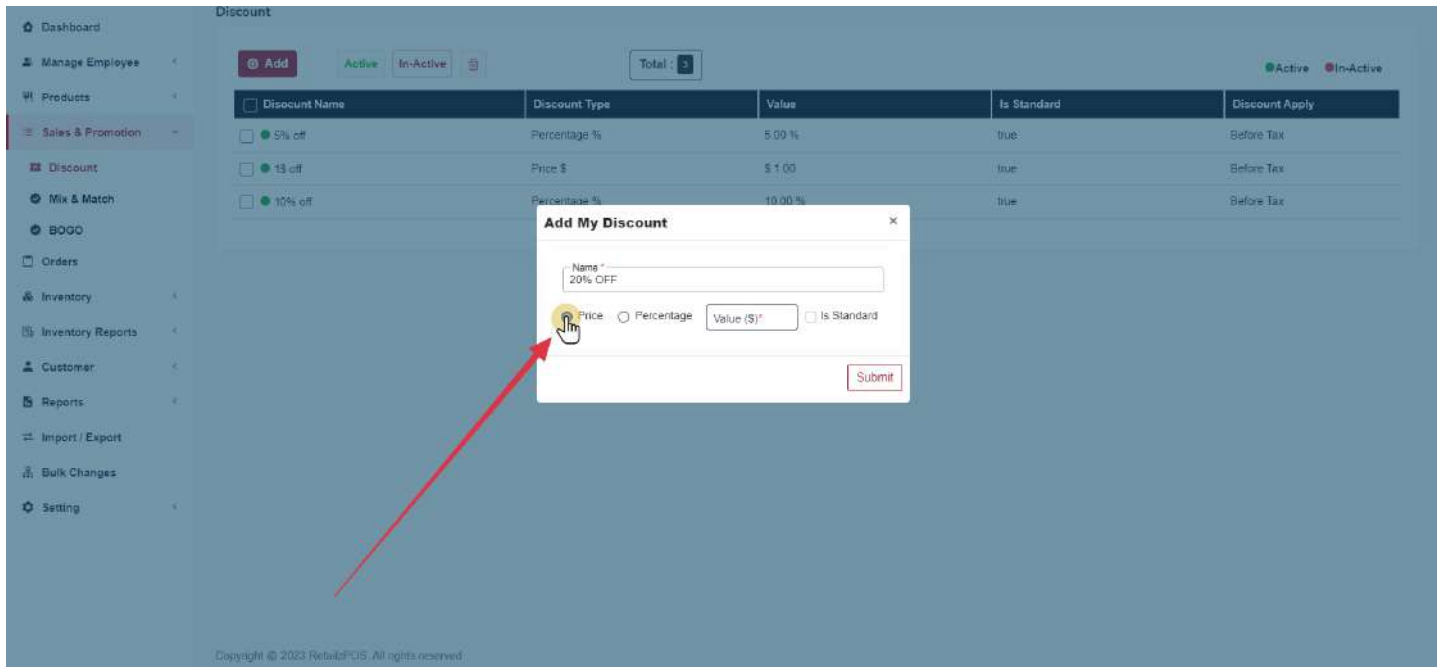
When creating a discount, always begin with providing it with the appropriate **Name**

The screenshot shows the 'Add My Discount' modal form. A red arrow points to the 'Name' input field, which is the first step in creating a discount. The form includes a 'Name' field, radio buttons for 'Price' (selected) and 'Percentage', a 'Value (\$)' field, and a 'Is Standard' checkbox. A 'Submit' button is at the bottom right.

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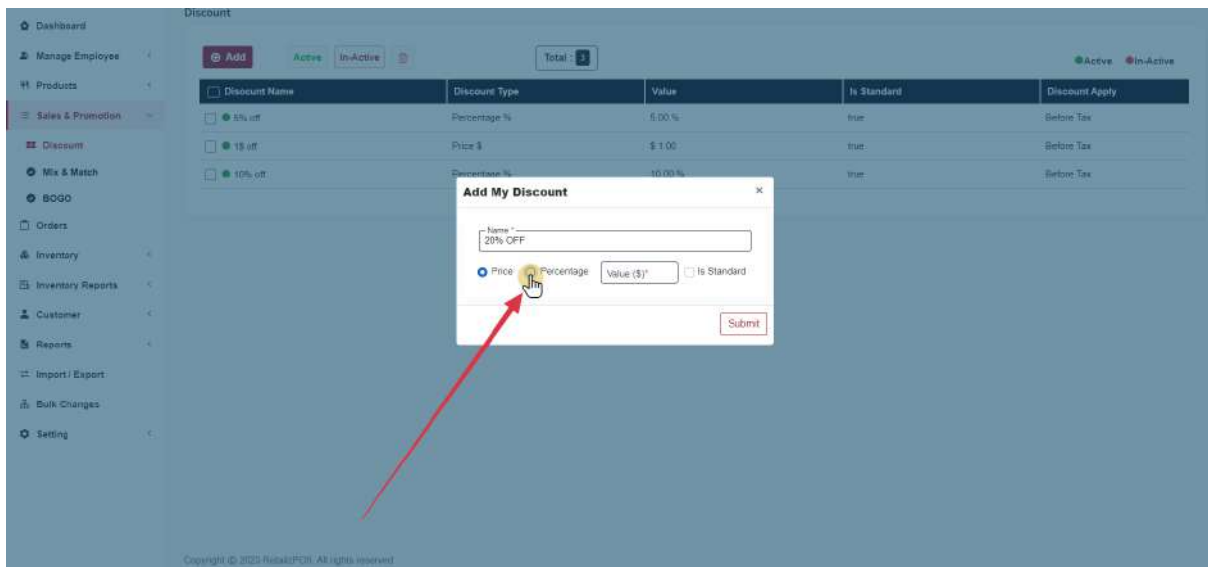
5.1.3 Back Office - Discount by Price

If you would like to create a **Price Discount**, click on **Price**



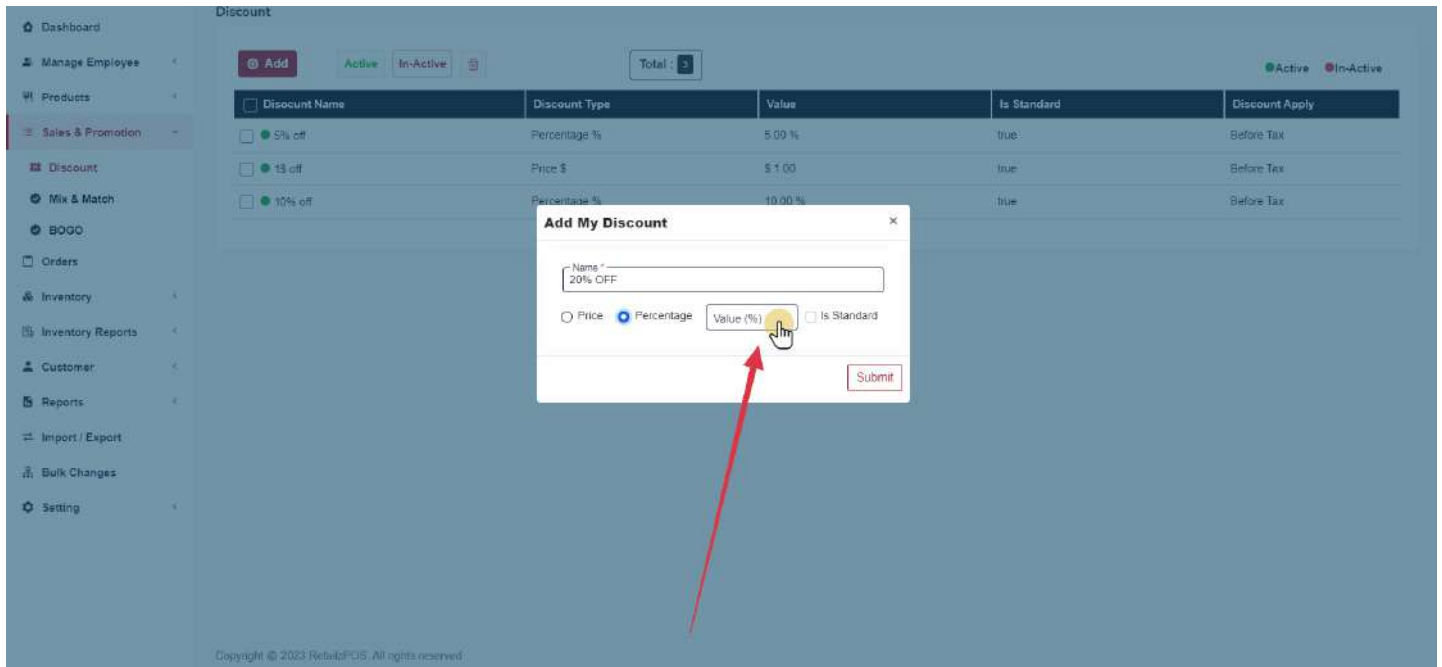
5.1.4 Back Office - Discount by Percentage

If you would like to create a **Percentage Discount**, click on **Percentage**



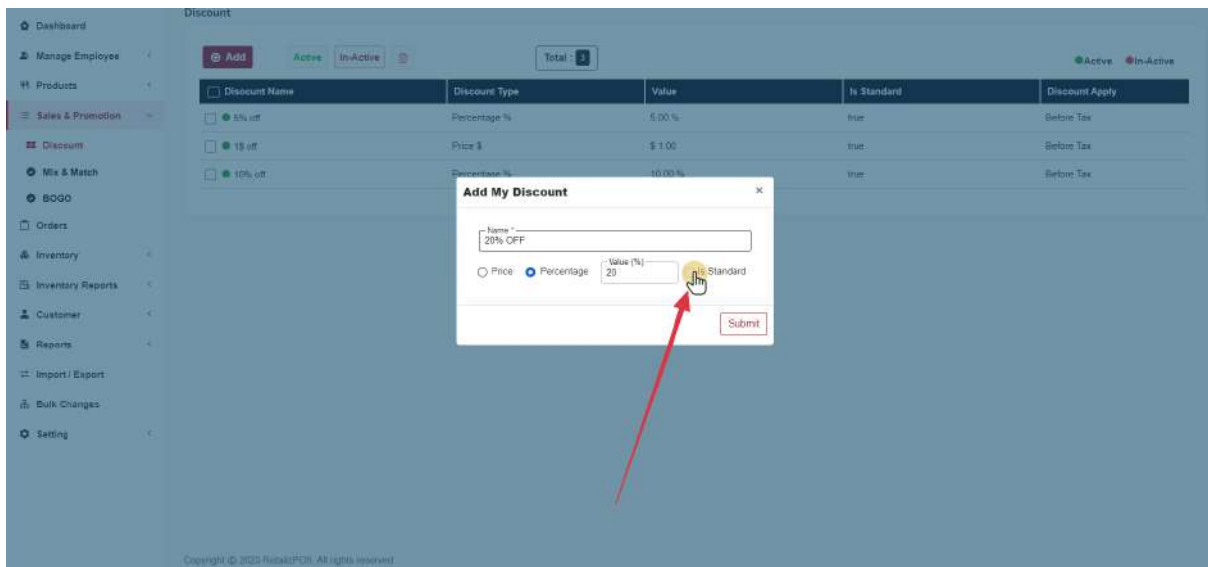
5.1.5 Back Office - Enter Discount Value

In the **Value** box, enter the **price or percentage** value of the discount you would like to create



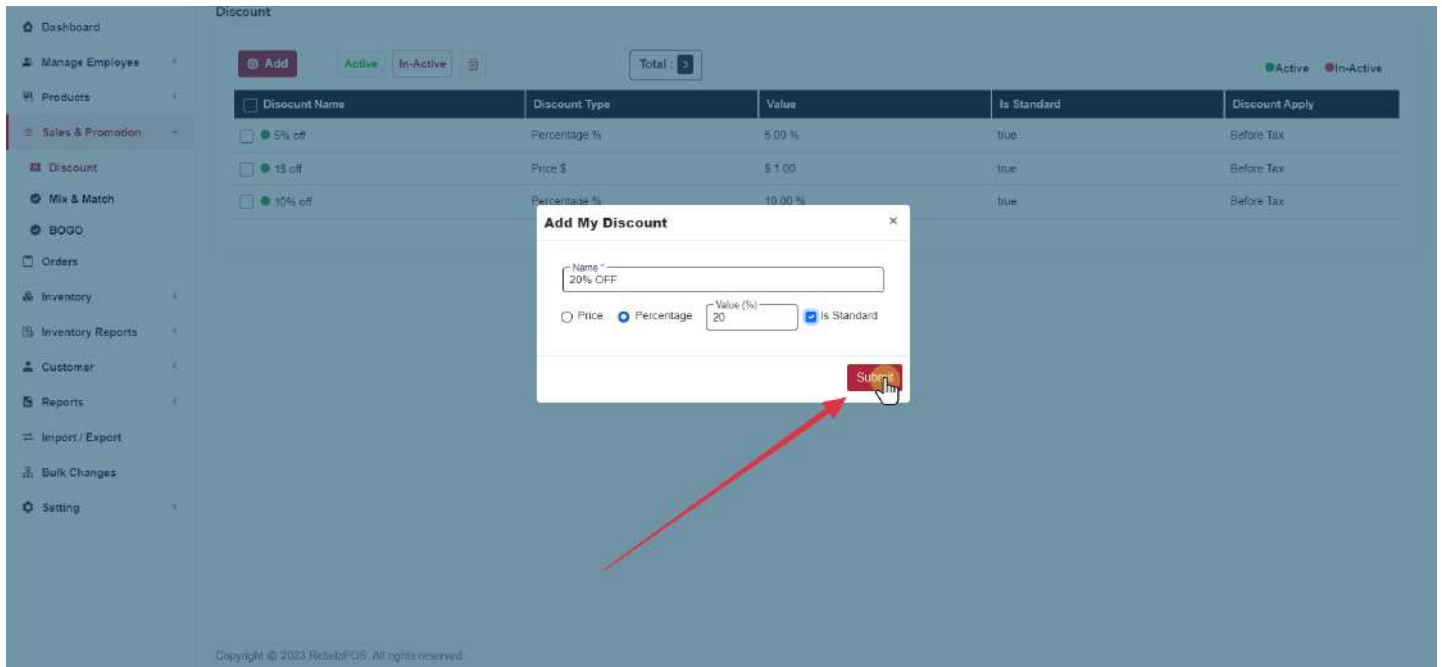
5.1.6 Back Office - Is Standard Discount

Selecting **Is Standard** will display your discount on the register screen as a shortcut



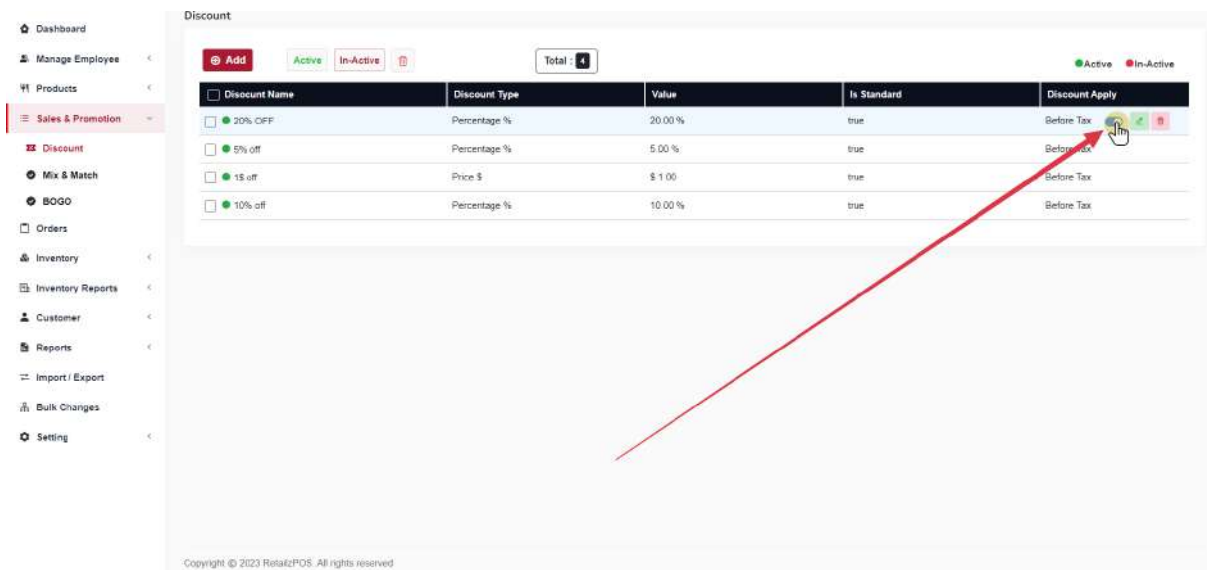
5.1.7 Back Office - Save Discount

To save your discount, click **Submit**



5.1.8 Back Office - Deactivate Discount

To deactivate a discount, hover over the discount and click the **blue** slider



5.1.9 Back Office - Confirm Discount Deactivation

To confirm discount deactivation, click **YES**

Alert

Are you sure want to set the discount as Deactive?

YES NO

Discount Name	Discount Type	Value	Is Standard	Discount Apply
20% OFF	Percentage %	20.00 %	true	Before Tax
5% off	Percentage %	5.00 %	true	Before Tax
1\$ off	Price \$	\$ 1.00	true	Before Tax
10% off	Percentage %	10.00 %	true	Before Tax

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5.1.10 Back Office - Activate Discount

To activate a discount, hover over the discount and click the **grayed out** slider

Discount

Are you sure want to set the discount as Deactive?

YES NO

Discount Name	Discount Type	Value	Is Standard	Discount Apply
20% OFF	Percentage %	20.00 %	true	Before Tax
5% off	Percentage %	5.00 %	true	Before Tax
1\$ off	Price \$	\$ 1.00	true	Before Tax
10% off	Percentage %	10.00 %	true	Before Tax

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5.1.11 Back Office - Confirm Discount Activation

To confirm discount activation, click **YES**

The screenshot displays the 'Discount' management interface. On the left is a sidebar menu with options: Dashboard, Manage Employee, Products, Sales & Promotion (selected), Discount, Mix & Match, BOGO, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area shows a table of discounts with columns: Discount Name, Discount Type, Value, Is Standard, and Discount Apply. There are four discounts listed: 20% OFF, 5% off, \$1 off, and 10% off. An 'Alert' dialog box is open in the center, asking 'Are you sure want to set the discount as Active?'. It has 'YES' and 'NO' buttons. A red arrow points from the bottom left towards the 'YES' button. The interface also includes an 'Add' button, 'Active' and 'In-Active' status filters, and a 'Total: 4' count.

Discount Name	Discount Type	Value	Is Standard	Discount Apply
<input type="checkbox"/> 20% OFF	Percentage %	20.00 %	true	Before Tax
<input type="checkbox"/> 5% off	Percentage %	5.00 %	true	Before Tax
<input type="checkbox"/> \$1 off	Price \$	\$ 1.00	true	Before Tax
<input type="checkbox"/> 10% off	Percentage %	10.00 %	true	Before Tax

Alert
Are you sure want to set the discount as Active?

YES NO

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5.1.12 Back Office - Edit Discount

To edit an existing discount, hover over the discount and select the **green** edit button

The screenshot displays the 'Discount' management page. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products, Sales & Promotion (selected), Discount, Mix & Match, BOGO, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main content area shows a table of discounts with columns: Discount Name, Discount Type, Value, Is Standard, and Discount Apply. There are four discounts listed: 20% OFF, 5% off, 1\$ off, and 10% off. Each row has a green edit button, a green active button, and a red trash can button. A red arrow points to the green edit button of the first discount (20% OFF). Above the table, there are buttons for 'Add', 'Active', 'In-Active', and a 'Total: 4' indicator. At the bottom left, there is a copyright notice: 'Copyright © 2023 RetailzPOS. All rights reserved.'

Discount Name	Discount Type	Value	Is Standard	Discount Apply
20% OFF	Percentage %	20.00 %	true	Before Tax
5% off	Percentage %	5.00 %	true	Before Tax
1\$ off	Price \$	\$ 1.00	true	Before Tax
10% off	Percentage %	10.00 %	true	Before Tax

5.1.13 Back Office - Delete Discount

To delete an existing discount, hover over the discount and select the **red** trash can button

This screenshot is identical to the one in section 5.1.12, showing the 'Discount' management page. It includes the same sidebar, table of discounts, and navigation elements. A red arrow points to the red trash can button of the first discount (20% OFF), illustrating the deletion process. The copyright notice at the bottom left remains the same: 'Copyright © 2023 RetailzPOS. All rights reserved.'

Discount Name	Discount Type	Value	Is Standard	Discount Apply
20% OFF	Percentage %	20.00 %	true	Before Tax
5% off	Percentage %	5.00 %	true	Before Tax
1\$ off	Price \$	\$ 1.00	true	Before Tax
10% off	Percentage %	10.00 %	true	Before Tax

5.1.14 Back Office - Confirm Discount Deletion

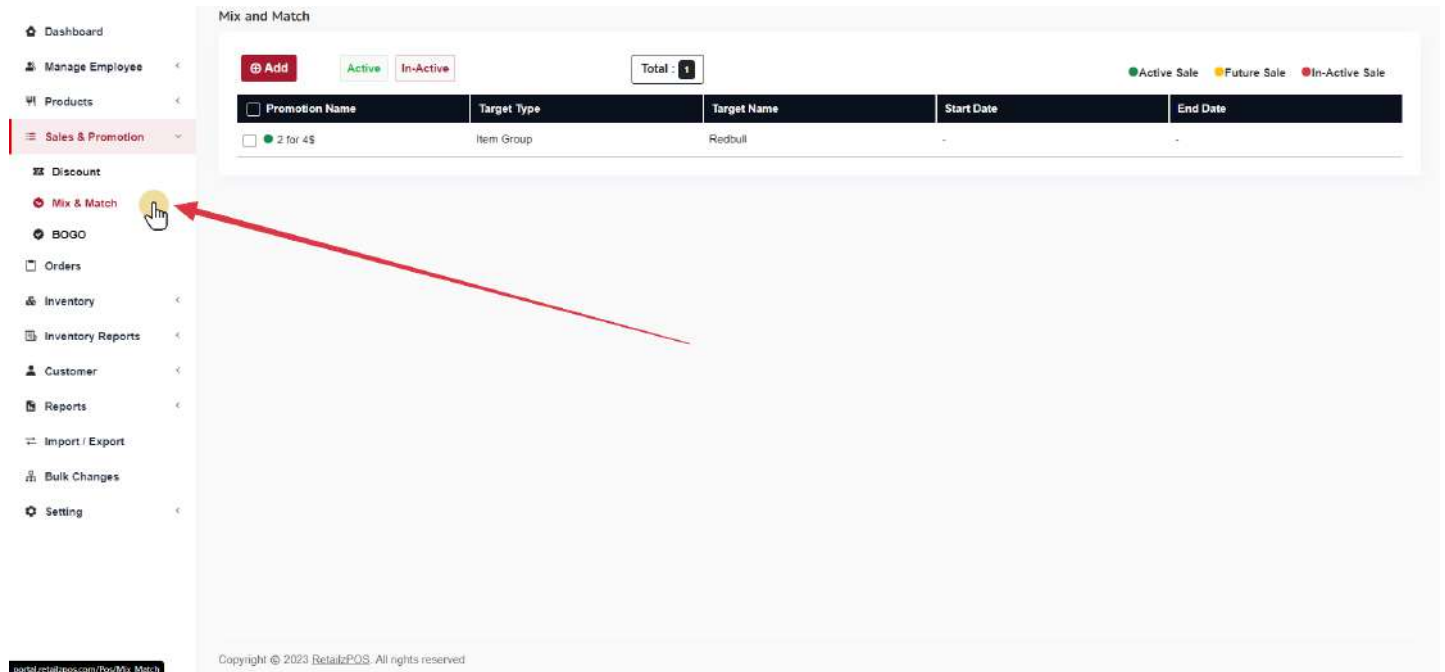
To confirm deleting a discount, click **YES**

The screenshot displays the 'Discount' management interface. On the left is a sidebar menu with options: Dashboard, Manage Employee, Products, Sales & Promotion (selected), Discount, Mix & Match, BOGO, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area shows a table of discounts with columns: Discount Name, Discount Type, Value, Is Standard, and Discount Apply. There are four discounts listed: 20% OFF, 5% off, 1\$ off, and 10% off. An 'Alert' dialog box is open in the center, asking 'Are You Sure want to delete this Discount?'. It has two buttons: 'YES' (highlighted with a red arrow) and 'NO'. The footer of the interface reads 'Copyright © 2023 RetailPOS. All rights reserved.'

Discount Name	Discount Type	Value	Is Standard	Discount Apply
<input type="checkbox"/> 20% OFF	Percentage %	20.00 %	true	Before Tax
<input type="checkbox"/> 5% off	Percentage %	5.00 %	true	Before Tax
<input type="checkbox"/> 1\$ off	Price \$	\$ 1.00	true	Before Tax
<input type="checkbox"/> 10% off	Percentage %	10.00 %	true	Before Tax

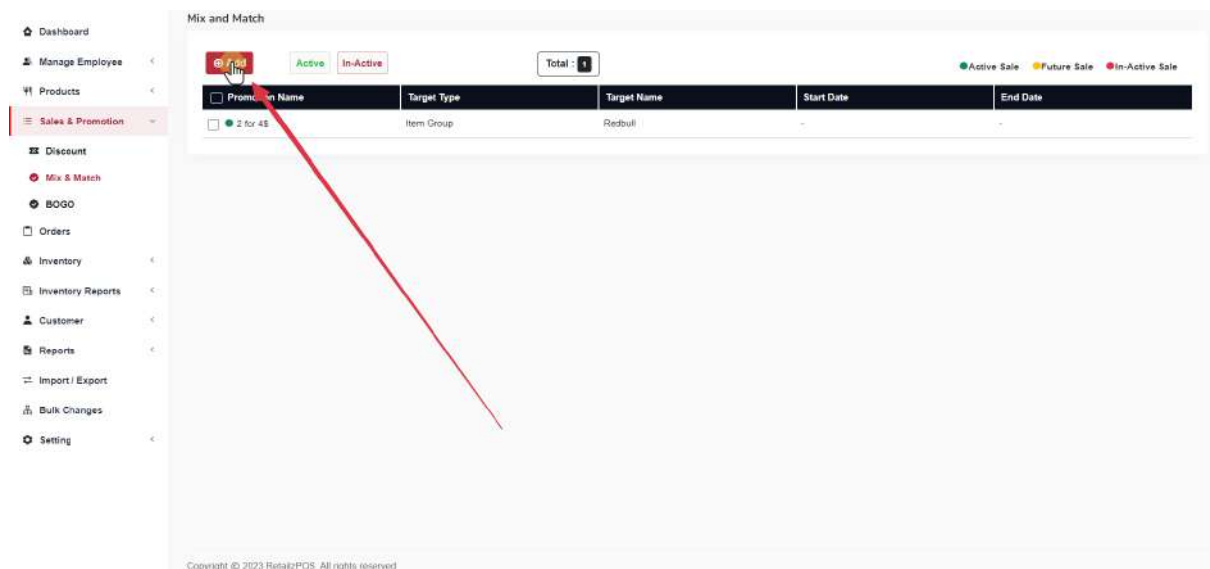
5.2 Back Office - Mix & Match

Under the Sales & Promotions module, click on **Mix & Match** to bring up your stores Mix & Match promotions list



5.2.1 Back Office - Create a New Mix & Match Promotion

To create a mix and match promotion, click **Add**



5.2.2 Back Office - Mix & Match Name

When creating a mix and match promotion, always begin with providing it with the appropriate **Name**

The screenshot shows the 'Add Mix & Match Promotion' dialog box. A red arrow points to the 'Promotion Name' input field, which is currently empty. The dialog box includes the following fields and options:

- Promotion Name ***: Text input field.
- Select Promotion Target ***: Dropdown menu.
- Select Target**: Dropdown menu.
- ☐ Discount odd items in pricing
- ☐ Limited Time Promotion
- Start Date**: Date picker.
- End Date**: Date picker.
- Days of the week**: Section with checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- Sale 1**: Quantity * (\$ Sale Price *
- Sale 2**: Quantity (\$ Sale Price
- Submit**: Button.

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5.2.3 Back Office - Mix & Match Promotion Target

When creating a mix & match promotion, select your **Promotion Target**

The screenshot shows the 'Add Mix & Match Promotion' dialog box. A red arrow points to the 'Select Promotion Target' dropdown menu, which is currently set to 'Redbull'. The dialog box includes the following fields and options:

- Promotion Name ***: Text input field containing 'Redbull'.
- Select Promotion Target ***: Dropdown menu.
- Select Target**: Dropdown menu.
- ☐ Discount odd items in pricing
- ☐ Limited Time Promotion
- Start Date**: Date picker.
- End Date**: Date picker.
- Days of the week**: Section with checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- Sale 1**: Quantity * (\$ Sale Price *
- Sale 2**: Quantity (\$ Sale Price
- Submit**: Button.

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5.2.4 Back Office - Mix & Match Group Target

After selecting your promotion target under mix and match promotions, select the **Target**

The screenshot shows the 'Add Mix & Match Promotion' dialog box. The background interface includes a sidebar with navigation options like Dashboard, Manage Employees, Products, Sales & Promotion, Discount, Mix & Match, BOGO, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area is titled 'Mix and Match' and contains a table with columns for Promotion Name, Target, Start Date, and End Date. A table with one row is visible, showing '2 for 4\$' under Promotion Name and 'Item' under Target. The dialog box has the following fields and options:

- Promotion Name *: Redbull
- Select Promotion Target *: Item Group
- Select Target (button)
- ☐ Discount odd items in pricing
- ☐ Limited Time Promotion
- Start Date (calendar icon)
- End Date (calendar icon)
- Days of the week** section with checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- Sale 1: Quantity * and (\$) Sale Price *
- Sale 2: Quantity and (\$) Sale Price
- Submit button

A red arrow points to the 'Select Target' button in the dialog box.

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5.2.5 Back Office - Mix & Match Odd Items in Pricing

To discount odd items in pricing under mix & match promotions, check the box next to **Discount odd items in pricing**

The screenshot shows the 'Add Mix & Match Promotion' dialog box. A red arrow points to the checkbox labeled 'Discount odd items in pricing', which is checked. The dialog box contains the following fields and options:

- Promotion Name: Redbull
- Select Promotion Target: Item Group
- Select Target: Redbull
- ☒ Discount odd items in pricing
- ☐ Limited Time Promotion
- Start Date: [Calendar icon]
- End Date: [Calendar icon]
- Days of the week:
 - ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday
 - ☐ Friday ☐ Saturday ☐ Sunday
- Sale 1: Quantity * [] (\$ Sale Price * [])
- Sale 2: Quantity [] (\$ Sale Price [])
- Submit button

5.2.6 Back Office - Mix & Match Limited Time Promotion

If you want to create a limited time mix & match promotion, check the **Limited Time Promotion** box

The screenshot shows the 'Add Mix & Match Promotion' dialog box. The 'Limited Time Promotion' checkbox is checked, indicated by a red arrow. The dialog includes fields for 'Promotion Name' (Redbull), 'Select Promotion Target' (Item Group), 'Select Target' (Redbull), 'Start Date', 'End Date', and 'Days of the week' (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday). There are also sections for 'Sale 1' and 'Sale 2' with 'Quantity' and '(\$) Sale Price' fields. A 'Submit' button is at the bottom right.

5.2.7 Back Office - Mix & Match Promotion Start Date

Select the mix & match promotion **Start Date**

The screenshot shows the 'Add Mix & Match Promotion' dialog box. The 'Start Date' field is highlighted with a red arrow, indicating where to select the promotion start date. The dialog includes fields for 'Promotion Name' (Redbull), 'Select Promotion Target' (Item Group), 'Select Target' (Redbull), 'Start Date', 'End Date', and 'Days of the week' (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday). There are also sections for 'Sale 1' and 'Sale 2' with 'Quantity' and '(\$) Sale Price' fields. A 'Submit' button is at the bottom right.

5.2.8 Back Office - Mix & Match Promotion End Date

Select the mix & match promotion **End Date**

Add Mix & Match Promotion

Promotion Name * Redbull Select Promotion Target * Item Group

Select Target * Redbull

☐ Discount odd items in pricing ☒ Limited Time Promotion

Start Date Mar 31, 2023 02:25 PM End Date

Days of the week

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday
☐ Friday ☐ Saturday ☐ Sunday

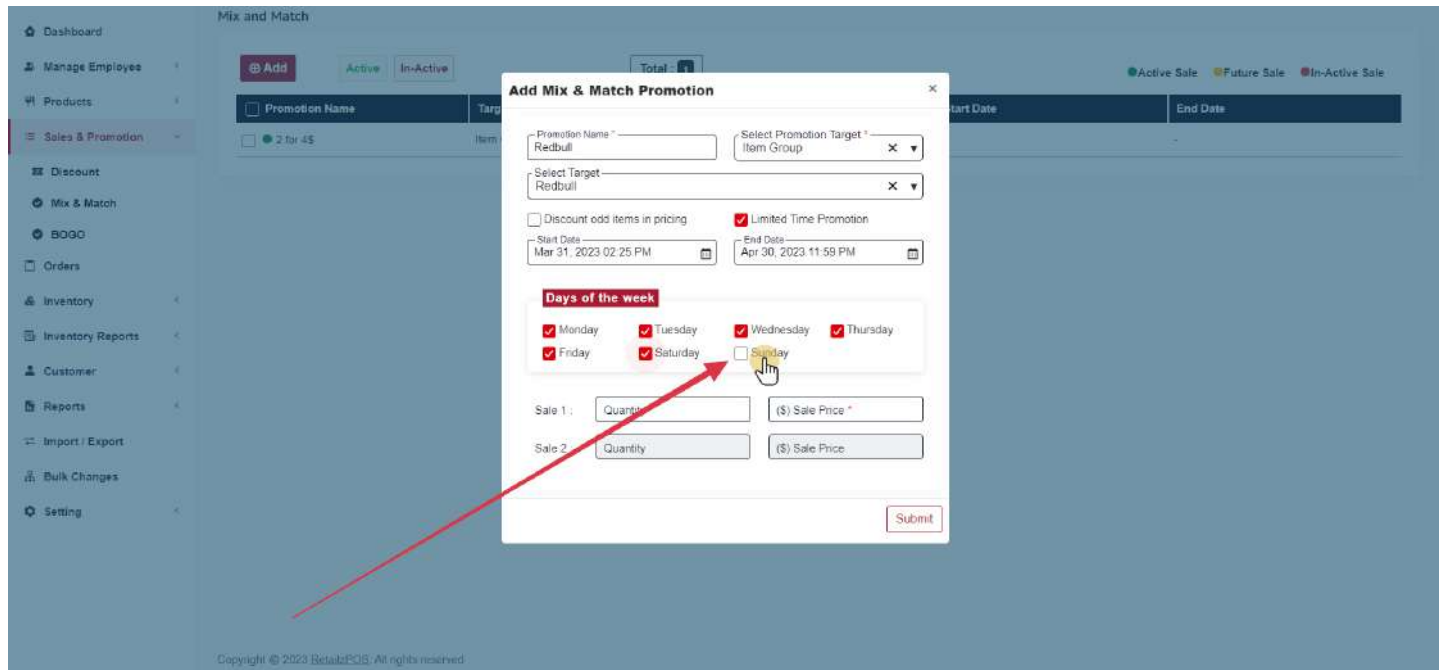
Sale 1: Quantity * (\$ Sale Price *

Sale 2: Quantity (\$ Sale Price

Submit

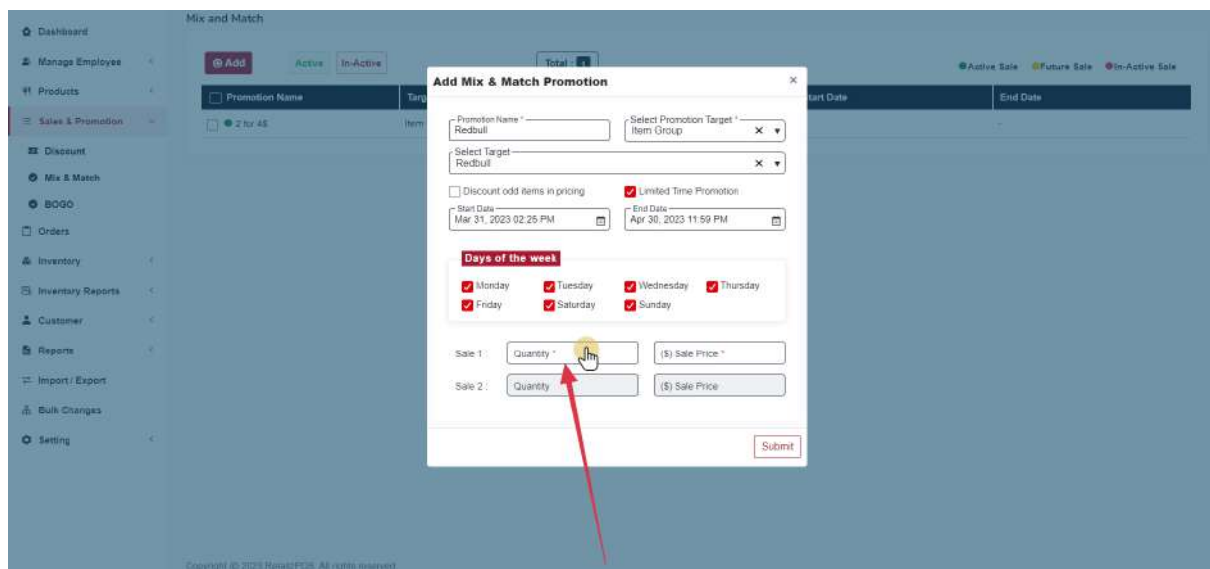
5.2.9 Back Office - Mix & Match Promotion Day Selection

If you would like to create a promotion that exists on specific **days of the week**, click the checkbox for each day



5.2.10 Back Office - Mix & Match Sale Quantity

Enter the **purchase quantity** amount for your mix & match promotion



5.2.11 Back Office - Mix & Match Sale Price

Enter the mix & match promotion **sale price**

The screenshot shows the 'Add Mix & Match Promotion' dialog box. The 'Promotion Name' is 'Redbull'. The 'Select Promotion Target' is 'Item Group'. The 'Select Target' is 'Redbull'. The 'Discount odd items in pricing' checkbox is unchecked. The 'Limited Time Promotion' checkbox is checked. The 'Start Date' is 'Mar 31, 2023 02:25 PM' and the 'End Date' is 'Apr 30, 2023 11:59 PM'. The 'Days of the week' section has checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday, all of which are checked. The 'Sale 1' section shows a quantity of 2 and a sale price of \$5.00. The 'Sale 2' section shows a quantity field and a sale price field. A red arrow points to the '\$ Sale Price' field for Sale 1.

5.2.12 Back Office - Mix & Match Promotion Name Confirmation

When clicking off the sale price, **confirm the name of the promotion**

The screenshot shows the 'Add Mix & Match Promotion' dialog box with an 'Alert' dialog box overlaid. The 'Alert' dialog asks 'Are You Sure want to change Promotion Name?' and has 'Yes' and 'No' buttons. A red arrow points to the 'Yes' button.

5.2.13 Back Office - Save Mix & Match Promotion

To confirm your mix & match promotion, click **SUBMIT**

The screenshot shows the 'Add Mix & Match Promotion' dialog box. The 'Promotion Name' field contains 'Redbull 2 for \$ 5.00'. The 'Select Promotion Target' dropdown is set to 'Item Group'. The 'Select Target' dropdown is set to 'Redbull'. The 'Discount add items in pricing' checkbox is unchecked, and the 'Limited Time Promotion' checkbox is checked. The 'Start Date' is 'Mar 31, 2023 02:25 PM' and the 'End Date' is 'Apr 30, 2023 11:59 PM'. The 'Days of the week' section shows all days (Monday through Sunday) are selected. The 'Sale 1' section shows 'Quantity' as '2' and '(\$ Sale Price)' as '5.00'. The 'Sale 2' section is empty. A red arrow points to the 'Submit' button at the bottom right of the dialog.

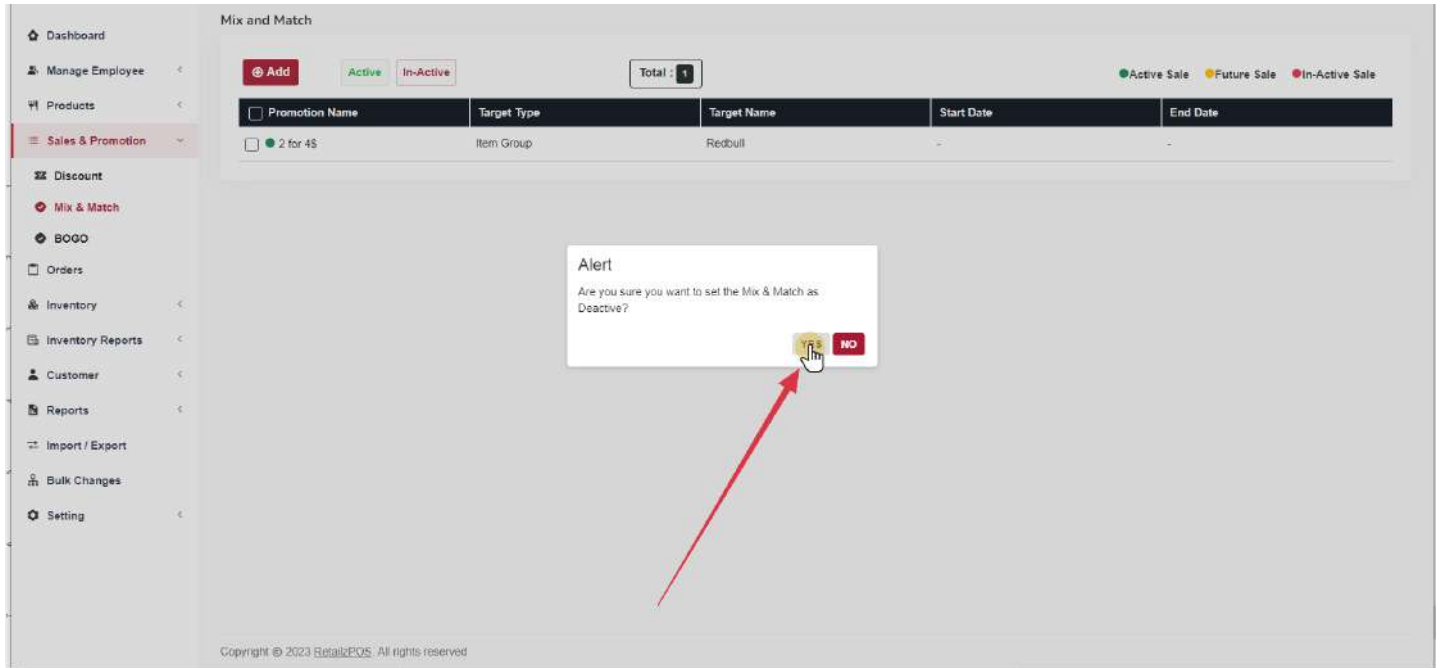
5.2.14 Back Office - Deactivate Mix & Match

To deactivate a mix & match, hover over the mix & match promotion and click the **blue** slider

The screenshot shows the 'Mix and Match' table. The table has columns: Promotion Name, Target Type, Target Name, Start Date, and End Date. The first row shows a promotion named '2 for 4\$' with Target Type 'Item Group' and Target Name 'Redbull'. A red arrow points to the blue slider icon in the rightmost column of the first row, which is used to deactivate the promotion.

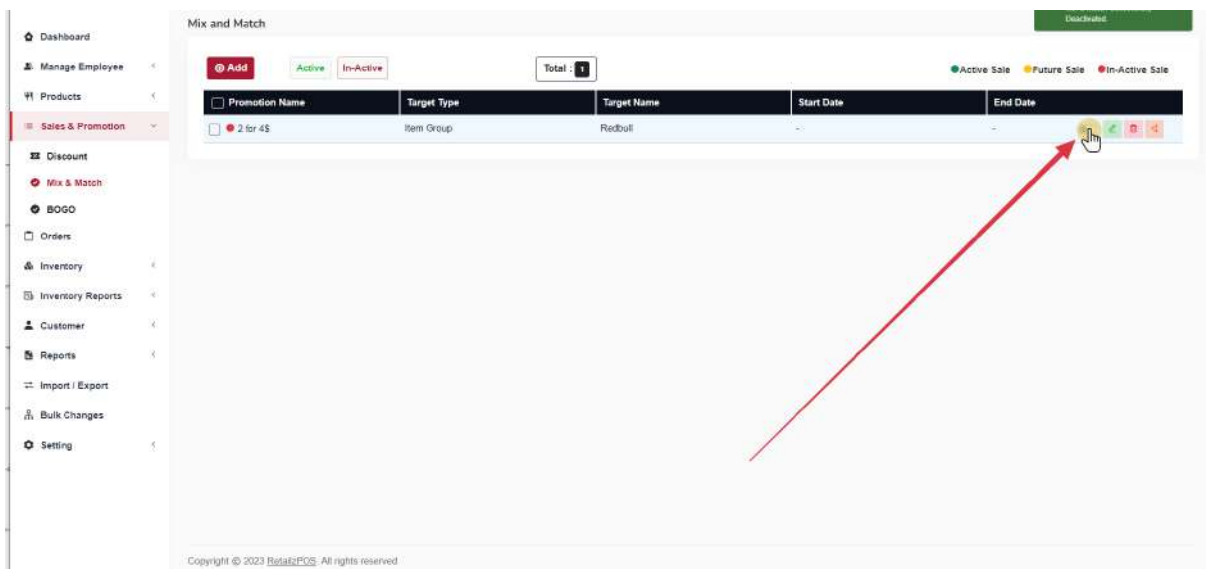
5.2.15 Back Office - Confirm Mix & Match Deactivation

To confirm mix & match promotion deactivation, click **YES**



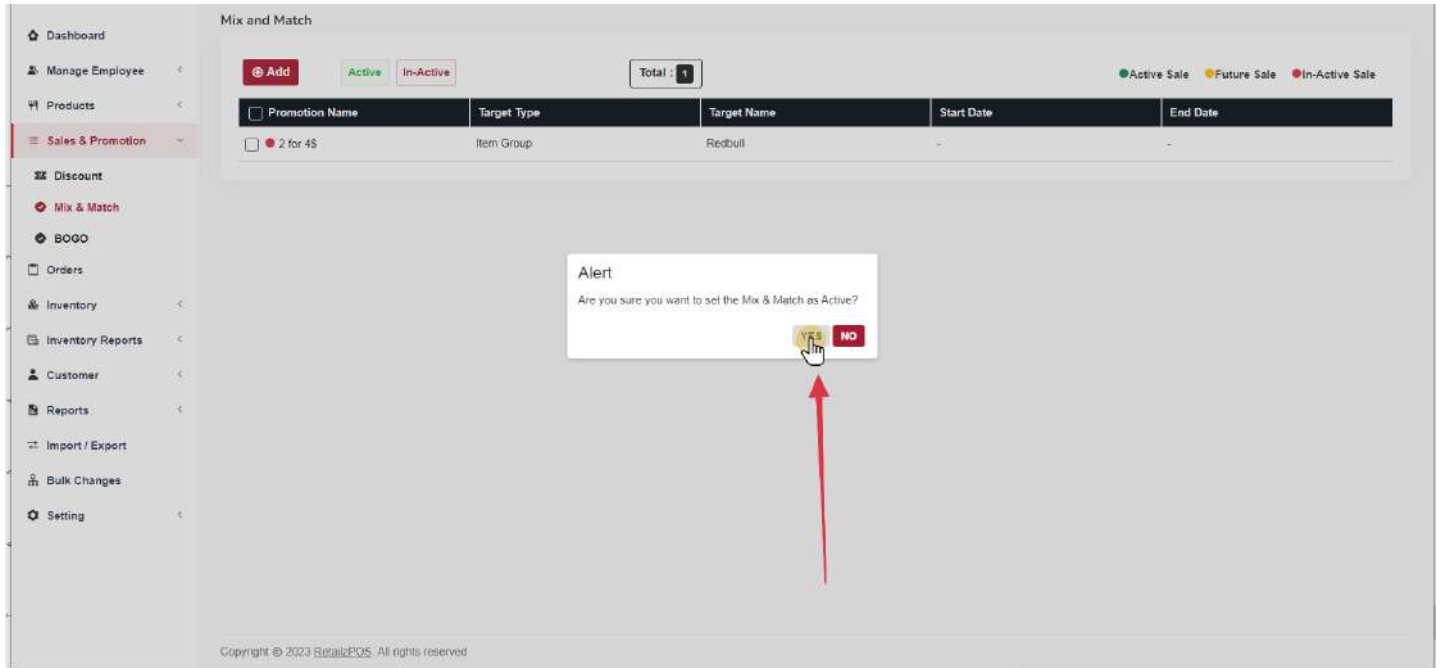
5.2.16 Back Office - Activate Mix & Match

To activate a mix & match promotion, hover over the mix & match promotion and click the grayed out slider



5.2.17 Back Office - Confirm Mix & Match Activation

To confirm mix & match promotion activation, click **YES**



5.2.18 Back Office - Edit Mix & Match

To edit an existing mix & match promotion, hover over the mix & match promotion and select the **green** edit button

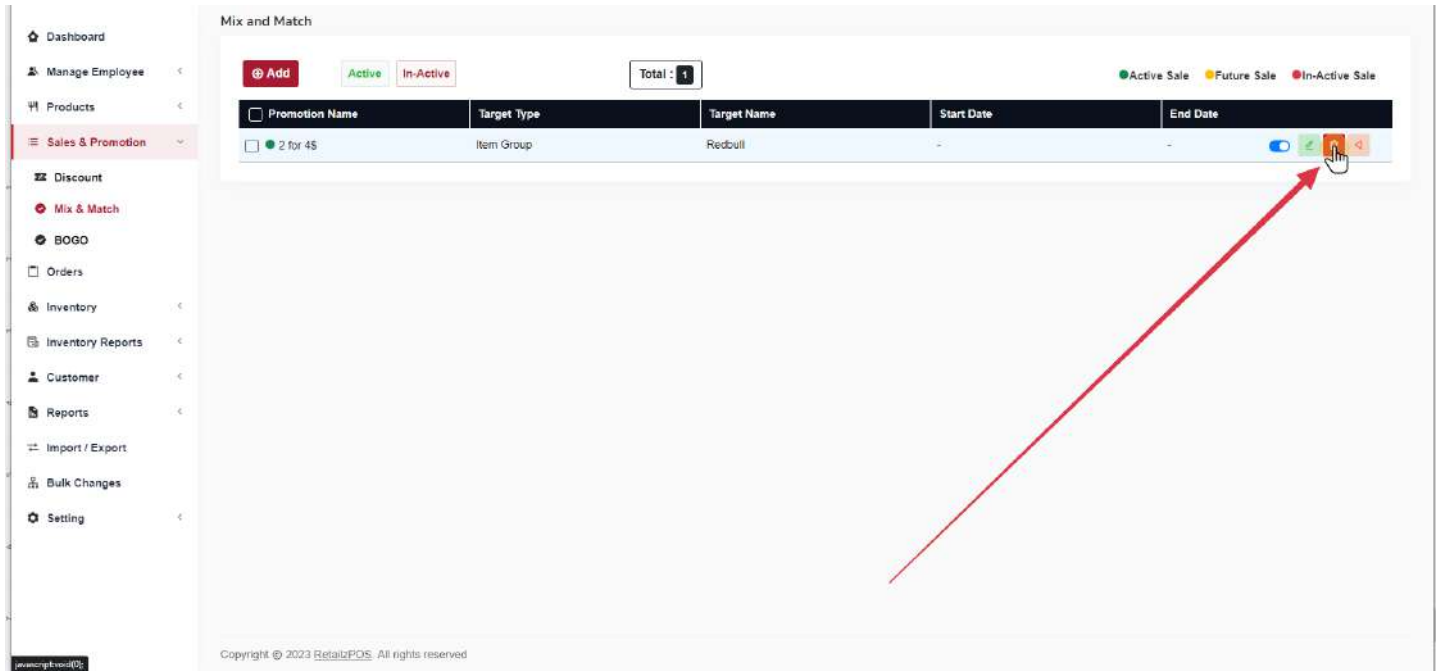
The screenshot displays the 'Mix and Match' section of the Back Office. On the left is a sidebar menu with options: Dashboard, Manage Employee, Products, Sales & Promotion (selected), Discount, Mix & Match, BOGO, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main content area is titled 'Mix and Match' and includes a green 'Activated' status badge. Below this are filters for 'Add', 'Active', and 'In-Active', along with a 'Total : 1' count. A table lists the active promotion:

Promotion Name	Target Type	Target Name	Start Date	End Date	Action
2 for 4\$	Item Group	Redbull	-	-	[Edit] [Delete] [Add]

A red arrow points to the green edit button in the action column of the first row. The footer shows 'Copyright © 2023 RetailPOS. All rights reserved'.

5.2.19 Back Office - Delete Mix & Match

To delete an existing mix & match promotion, hover over the mix & match promotion and select the **red** trash can button



5.2.20 Back Office - Display Mix & Match Promotion

To display your mix & match promotion, click the **orange** display button

Mix and Match

Total : 1
Active Sale Future Sale In-Active Sale

Promotion Name	Target Type	Target Name	Start Date	End Date
<input type="checkbox"/> 2 for 4\$	Item Group	Redbull	-	-

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5.3 Back Office - BOGO (Buy One Get One)

Under the Sales & Promotions module, click on **BOGO** to bring up your stores Buy One Get One Promotions

Bogo

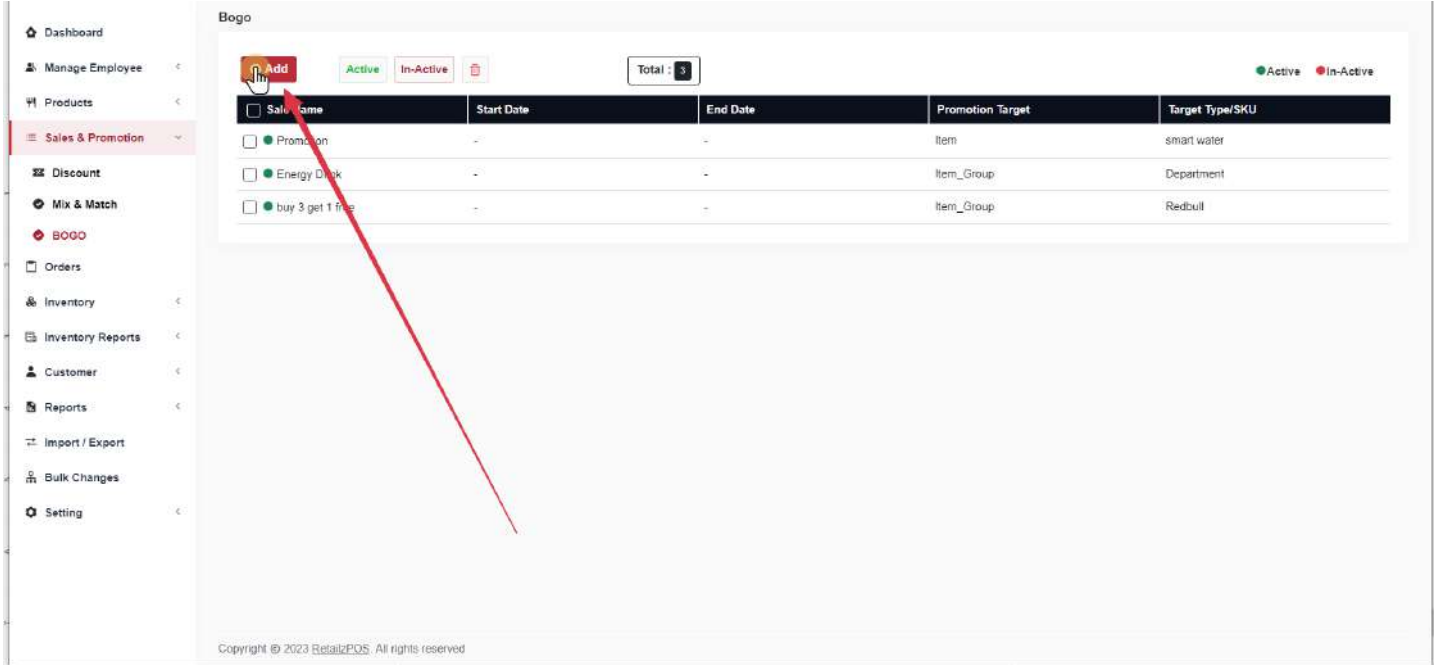
Total : 3
Active In-Active

Sale Name	Start Date	End Date	Promotion Target	Target Type/SKU
<input type="checkbox"/> Promotion	-	-	Item	smart water
<input type="checkbox"/> Energy Drink	-	-	Item_Group	Department
<input type="checkbox"/> buy 3 get 1 free	-	-	Item_Group	Redbull

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5.3.1 Back Office - Create a new BOGO Promotion

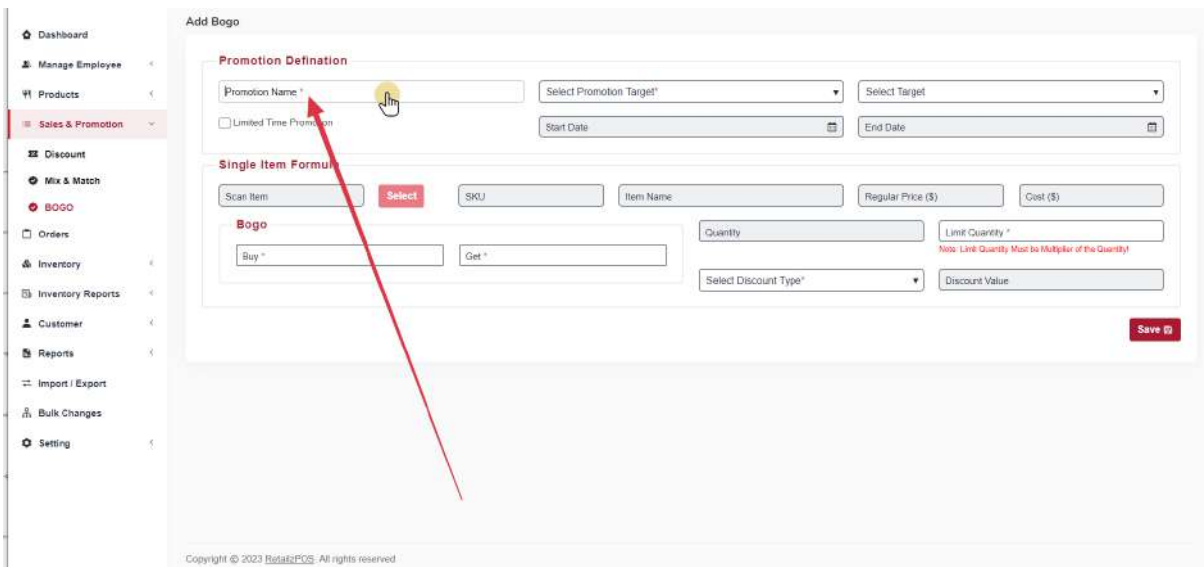
To create a BOGO promotion, click **Add**



The screenshot shows the 'Bogo' section of the Back Office. On the left is a sidebar menu with options: Dashboard, Manage Employee, Products, Sales & Promotion (selected), Discount, Mix & Match, BOGO, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main content area is titled 'Bogo' and contains an 'Add' button (highlighted with a red arrow), 'Active' and 'In-Active' status filters, and a 'Total: 3' indicator. Below these is a table with columns: ☐ Sale Name, Start Date, End Date, Promotion Target, and Target Type/SKU. The table lists three items: 'Promotion', 'Energy Drink', and 'buy 3 get 1 free'. At the bottom, it says 'Copyright © 2023 RetailzPOS. All rights reserved'.

5.3.2 Back Office - BOGO Promotion Name

When creating a BOGO promotion, always begin with providing it with the appropriate **Name**



The screenshot shows the 'Add Bogo' form. It has a sidebar menu on the left with the same options as the previous screenshot. The main content area is titled 'Add Bogo' and contains a 'Promotion Definition' section with a 'Promotion Name' input field (highlighted with a red arrow), a 'Select Promotion Target' dropdown, and a 'Select Target' dropdown. Below this is a 'Single Item Formula' section with a 'Scan Item' button, a 'Select' button, and input fields for 'SKU', 'Item Name', 'Regular Price (\$)', and 'Cost (\$)'. There is also a 'Bogo' section with 'Buy' and 'Get' input fields, a 'Quantity' input field, a 'Limit Quantity' input field, a 'Select Discount Type' dropdown, and a 'Discount Value' input field. A 'Save' button is at the bottom right. At the bottom, it says 'Copyright © 2023 RetailzPOS. All rights reserved'.

5.3.3 Back Office - BOGO Promotion Target

When creating a BOGO promotion, select your **Promotion Target**

Add Bogo

Promotion Definition

Promotion Name * Candy

Select Promotion Target*

Select Target

☐ Limited Time Promotion

Start Date

End Date

Single Item Formula

Scan Item **Select** SKU Item Name Regular Price (\$) Cost (\$)

Bogo

Buy * Get *

Quantity Limit Quantity *

Select Discount Type* Discount Value

Save

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5.3.4 Back Office - BOGO Group Target/Item Target

After selecting your promotion target under BOGO promotions, select the **Target**

Add Bogo

Promotion Definition

Promotion Name * Candy

Select Promotion Target* Department

Select Target

☐ Limited Time Promotion

Start Date

End Date

Single Item Formula

Scan Item **Select** SKU Item Name Regular Price (\$) Cost (\$)

Bogo

Buy * Get *

Quantity Limit Quantity *

Select Discount Type* Discount Value

Save

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5.3.5 Back Office - BOGO Limited Time Promotion

If you want to create a limited time BOGO promotion, check the **Limited Time Promotion** box

Edit Bogo

Promotion Definition

Promotion Name: Candy

Select Promotion Target: Department

Select Target: CANDY

☒ Limited Time Promotion

Start Date: [Calendar Icon]

End Date: [Calendar Icon]

Single Item Formula

Scan Item: [Select] SKU: [Text] Item Name: [Text] Regular Price (\$): [Text] Cost (\$): [Text]

Bogo

Buy: [Text] Get: [Text]

Quantity: 0

Limit Quantity: [Text]

Note: Limit Quantity Must be Multiple of the Quantity!

Select Discount Type: [Dropdown]

Discount Value: [Text]

Save

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5.3.6 Back Office - BOGO Start Date

Select your BOGO Promotion **Start Date**

Edit Bogo

Promotion Definition

Promotion Name: Candy

Select Promotion Target: Department

Select Target: CANDY

☒ Limited Time Promotion

Start Date: [Calendar Icon]

End Date: [Calendar Icon]

Single Item Formula

Scan Item: [Select] SKU: [Text] Item Name: [Text] Regular Price (\$): [Text] Cost (\$): [Text]

Bogo

Buy: [Text] Get: [Text]

Quantity: 0

Limit Quantity: [Text]

Note: Limit Quantity Must be Multiple of the Quantity!

Select Discount Type: [Dropdown]

Discount Value: [Text]

Save

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5.3.7 Back Office - BOGO End Date

Select your BOGO Promotion **End Date**

Edit Bogo

Promotion Definition

Promotion Name * Candy Select Promotion Target * Department Select Target CANDY

☒ Limited Time Promotion Start Date Apr 06, 2023 12:39 PM End Date

Single Item Formula

Scan Item Select SKU Item Name Regular Price (\$) Cost (\$)

Bogo Buy * Get * Quantity 0 Limit Quantity * Note: Limit Quantity Must be Multiple of the Quantity! Select Discount Type* Discount Value

Save

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5.3.8 Back Office - BOGO Buy Quantity

Enter the **Buy Quantity** amount for your BOGO promotion

Add Bogo

Promotion Definition

Promotion Name * Candy Select Promotion Target * Department Select Target CANDY

☐ Limited Time Promotion Start Date End Date

Single Item Formula

Scan Item Select SKU Item Name Regular Price (\$) Cost (\$)

Bogo Buy * Get * Quantity Limit Quantity * Note: Limit Quantity Must be Multiple of the Quantity! Select Discount Type* Discount Value

Save

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5.3.9 Back Office - BOGO Get Quantity

Enter the **Get Quantity** amount for your BOGO promotion

Add Bogo

Promotion Definition

Promotion Name: Candy

Select Promotion Target: Department

Select Target: CANDY

☐ Limited Time Promotion

Start Date:

End Date:

Single Item Formula

Scan Item: **Select** SKU: Item Name: Regular Price (\$): Cost (\$):

Bogo

Buy: 2

Get: 1

Quantity:

Limit Quantity:

Select Discount Type:

Discount Value:

Save

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5.3.10 Back Office - BOGO Limit Purchase Quantity

Enter the **limit on purchase quantity** for your BOGO promotion

Add Bogo

Promotion Definition

Promotion Name: Candy

Select Promotion Target: Department

Select Target: CANDY

☐ Limited Time Promotion

Start Date:

End Date:

Single Item Formula

Scan Item: **Select** SKU: Item Name: Regular Price (\$): Cost (\$):

Bogo

Buy: 2

Get: 1

Quantity: 3

Limit Quantity: 1

Select Discount Type:

Discount Value:

Save

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5.3.11 Back Office - BOGO Discount Type

View your BOGO promotion **Discount Type**

Add Bogo

Promotion Definition

Promotion Name: Candy Select Promotion Target: Department Select Target: CANDY

☐ Limited Time Promotion Start Date: End Date:

Single Item Formula

Scan Item: Select SKU: Item Name: Regular Price (\$): Cost (\$):

Bogo

Buy: 2 Get: 1 Quantity: 3 Limit Quantity: 6

Select Discount Type* Discount Value:

Save

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5.3.12 Back Office - BOGO Discount Type List

Select which **Discount Type** of BOGO promotion you want (**Amount Off; Free; Price; Percent**)

Add Bogo

Promotion Definition

Promotion Name: Candy Select Promotion Target: Department Select Target: CANDY

☐ Limited Time Promotion Start Date: End Date:

Single Item Formula

Scan Item: Select SKU: Item Name: Regular Price (\$): Cost (\$):

Bogo

Buy: 2 Get: 1 Quantity: 3 Limit Quantity: 6

Select Discount Type* AMOUNTOFF FREE PERCENT PRICE

Discount Value:

Save

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5.3.13 Back Office - Save BOGO Promotion

To save your BOGO promotion, click **Save**

Add Bogo

Promotion Definition

Promotion Name * Candy

Select Promotion Target * Department

Select Target CANDY

☐ Limited Time Promotion

Start Date

End Date

Single Item Formula

Scan Item Select SKU Item Name Regular Price (\$) Cost (\$)

Bogo

Buy * 2 Get * 1

Quantity 3 Limit Quantity * 6

Note: Limit Quantity Must be Multiple of the Quantity!

Select Discount Type * FREE

Discount Value

Save

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5.3.14 Back Office - Deactivate BOGO Promotion

To deactivate a BOGO promotion, hover over the BOGO promotion and click the **blue** slider

Bogo

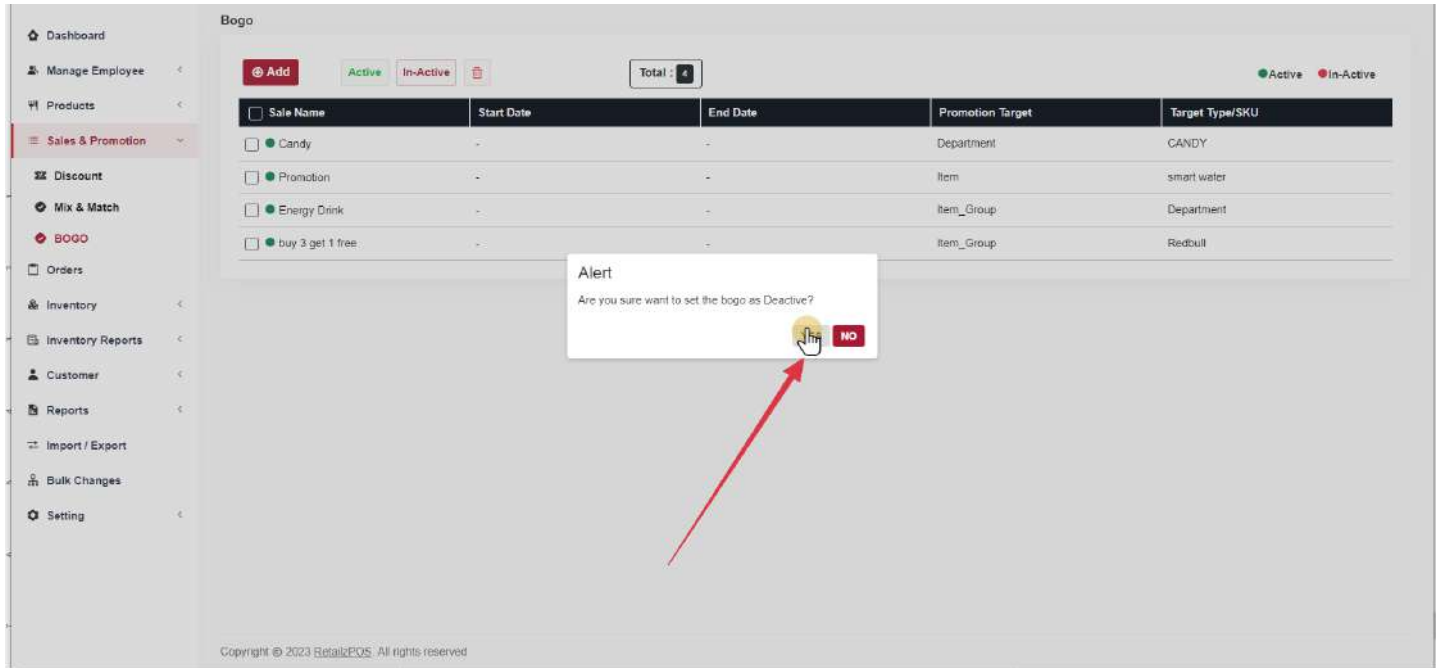
Add **Active** **In-Active** **Total: 4**

<input type="checkbox"/>	Sale Name	Start Date	End Date	Promotion Target	Target Type/SKU	<input type="checkbox"/>
<input type="checkbox"/>	Candy	-	-	Department	CANDY	<input type="checkbox"/>
<input type="checkbox"/>	Promotion	-	-	Item	smart water	<input type="checkbox"/>
<input type="checkbox"/>	Energy Drink	-	-	Item_Group	Department	<input type="checkbox"/>
<input type="checkbox"/>	buy 3 get 1 free	-	-	Item_Group	Redbull	<input type="checkbox"/>

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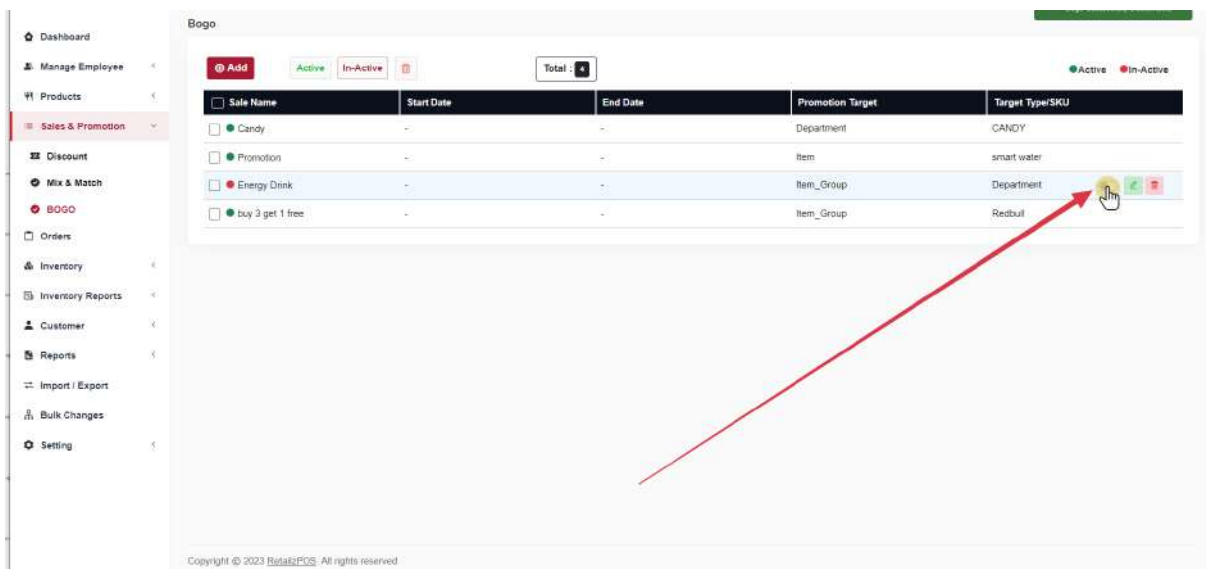
5.3.15 Back Office - Confirm BOGO Promotion Deactivation

To confirm a BOGO promotion deactivation, click **YES**



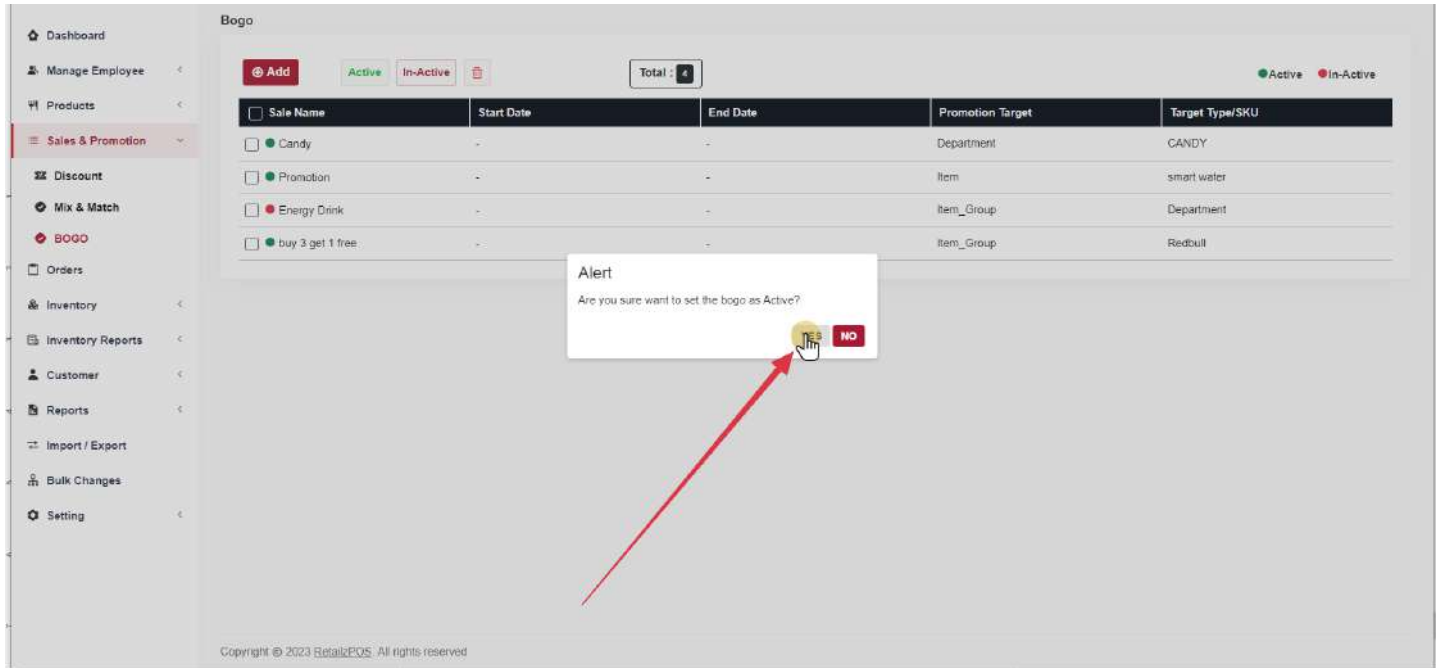
5.3.16 Back Office - Activate BOGO Promotion

To activate a BOGO promotion, hover over the BOGO promotion and click the grayed out slider



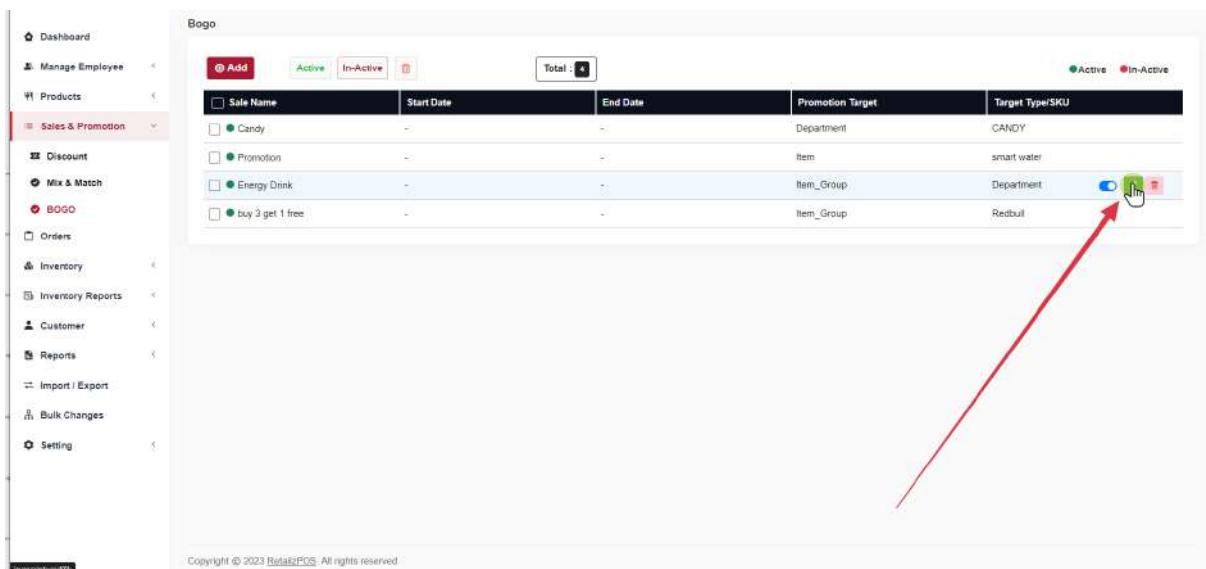
5.3.17 Back Office - Confirm BOGO Promotion Activation

To confirm BOGO promotion activation, click **YES**



5.3.18 Back Office - Edit BOGO Promotion

To edit an existing BOGO promotion, hover over the BOGO promotion and select the **green** edit button



5.3.19 Back Office - Delete BOGO Promotion

To delete an existing BOGO promotion, hover over the BOGO promotion and select the **red** trash can button

The screenshot shows the 'Bogo' promotion management interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products, Sales & Promotion (selected), Discount, Mix & Match, BOGO, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main content area is titled 'Bogo' and contains a table of active promotions. The table has columns: Sale Name, Start Date, End Date, Promotion Target, and Target Type/SKU. There are four rows of promotions: 'Candy', 'Promotion', 'Energy Drink', and 'buy 3 get 1 free'. Each row has a status toggle (Active/In-Active) and a red trash can icon for deletion. A red arrow points to the trash can icon for the 'Energy Drink' promotion. At the bottom left, there is a small text: 'Copyright © 2023 RetailPOS. All rights reserved'.

Sale Name	Start Date	End Date	Promotion Target	Target Type/SKU	Action
Candy	-	-	Department	CANDY	[Active] [Trash]
Promotion	-	-	Item	smart water	[Active] [Trash]
Energy Drink	-	-	Item_Group	Department	[Active] [Trash]
buy 3 get 1 free	-	-	Item_Group	Redbull	[Active] [Trash]

6 Back Office - Orders

The screenshot shows the 'Orders' dashboard in the Back Office. The sidebar on the left has the 'Orders' menu item highlighted with a red arrow. The main dashboard area contains several widgets: 'Today Sales' (\$96.30), 'Today Void' (\$132.66), 'Today Delete' (\$181.58), and 'Today Return' (\$0.00). Below these are two charts: 'Sales Chart (Weekly)' showing Net Revenue, Tax, and Sales over a week, and 'Tender Wise (Monthly)' showing a donut chart for CASH (\$15795.28). At the bottom, there are two more widgets: 'Top 10 Selling Item (Monthly)' and 'Hourly Sales Reports (Daily)'. The footer shows the URL 'demo.retailpos.com/PosOrders'.

6.1 Back Office - Orders List

To view your store transaction history, select **Orders**

Order

Select Date Period: Apr 20, 2023 - Apr 26, 2023

Pos Order Id	Employee	Sub Total	Tax	Discount	Total	Payment Type	Time	Status
7OI-20230426134911842	Ritesh Patel	\$ 10.00	\$ 0.70	\$ 0.00	\$ 10.70	CASH	10:49 AM	Completed
7OI-20230426133709119	Ritesh Patel	\$ 10.00	\$ 0.70	\$ 0.00	\$ 10.70	CASH	10:37 AM	Completed
7OI-20230426132647190	Ritesh Patel	\$ 70.00	\$ 4.90	\$ 0.00	\$ 74.90	CASH	10:26 AM	Completed
6OI-20230421171657326	Ritesh Patel	\$ 0.00	\$ 3.45	\$ 0.00	\$ 3.45	CASH	02:16 PM	Partially Return
6OI-20230421171630483	Ritesh Patel	\$ 80.00	\$ 5.60	\$ 0.00	\$ 85.60	CASH	02:16 PM	Completed
6OI-20230421170903195	Ritesh Patel	\$ 1560.00	\$ 109.20	\$ 0.00	\$ 1669.20	CASH	02:09 PM	Completed
6OI-20230421122217957	Ritesh Patel	\$ 4499.50	\$ 314.97	\$ 0.00	\$ 4814.47	CASH	09:22 AM	Completed
6OI-20230421122107174	Ritesh Patel	\$ 1010.00	\$ 70.70	\$ 0.00	\$ 1080.70	CASH	09:21 AM	Completed
6OI-20230421122028865	Ritesh Patel	\$ 53.45	\$ 3.80	\$ 0.00	\$ 57.25	CASH	09:20 AM	Completed
6OI-20230421121651904	Ritesh Patel	\$ -89.99	\$ -6.30	\$ 0.00	\$ -96.29	CASH	09:16 AM	Return
6OI-20230421120437344	Ritesh Patel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	CASH	09:04 AM	Return
6OI-20230421115721718	Ritesh Patel	\$ 41.94	\$ 2.94	\$ 0.00	\$ 44.88	CASH	08:57 AM	Completed
6OI-20230421115700424	Ritesh Patel	\$ 539.94	\$ 37.80	\$ 0.00	\$ 577.74	CASH	08:57 AM	Completed
6OI-20230421115352642	Ritesh Patel	\$ 1946.59	\$ 136.27	\$ 0.00	\$ 2082.86	CASH	08:53 AM	Completed
6OI-20230421115219756	Ritesh Patel	\$ 3599.60	\$ 251.97	\$ 0.00	\$ 3851.57	CASH	08:52 AM	Completed
6OI-20230421114857004	Ritesh Patel	\$ 45.79	\$ 3.25	\$ 0.00	\$ 49.04	CASH	08:48 AM	Completed

demo@stapops.com/PanOrders

6.1.1 Back Office - View Order Receipt

To view your order/transaction receipt, hover over the order and click the **green** receipt icon

Order

Select Date Period: Apr 20, 2023 - Apr 26, 2023

Pos Order Id	Employee	Sub Total	Tax	Discount	Total	Payment Type	Time	Status
7OI-20230426134911842	Ritesh Patel	\$ 10.00	\$ 0.70	\$ 0.00	\$ 10.70	CASH	10:49 AM	Completed
7OI-20230426133709119	Ritesh Patel	\$ 10.00	\$ 0.70	\$ 0.00	\$ 10.70	CASH	10:37 AM	Completed
7OI-20230426132647190	Ritesh Patel	\$ 70.00	\$ 4.90	\$ 0.00	\$ 74.90	CASH	10:26 AM	Completed
6OI-20230421171657326	Ritesh Patel	\$ 0.00	\$ 3.45	\$ 0.00	\$ 3.45	CASH	02:16 PM	Partially Return
6OI-20230421171630483	Ritesh Patel	\$ 80.00	\$ 5.60	\$ 0.00	\$ 85.60	CASH	02:16 PM	Completed
6OI-20230421170903195	Ritesh Patel	\$ 1560.00	\$ 109.20	\$ 0.00	\$ 1669.20	CASH	02:09 PM	Completed
6OI-20230421122217957	Ritesh Patel	\$ 4499.50	\$ 314.97	\$ 0.00	\$ 4814.47	CASH	09:22 AM	Completed
6OI-20230421122107174	Ritesh Patel	\$ 1010.00	\$ 70.70	\$ 0.00	\$ 1080.70	CASH	09:21 AM	Completed
6OI-20230421122028865	Ritesh Patel	\$ 53.45	\$ 3.80	\$ 0.00	\$ 57.25	CASH	09:20 AM	Completed
6OI-20230421121651904	Ritesh Patel	\$ -89.99	\$ -6.30	\$ 0.00	\$ -96.29	CASH	09:16 AM	Return
6OI-20230421120437344	Ritesh Patel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	CASH	09:04 AM	Return
6OI-20230421115721718	Ritesh Patel	\$ 41.94	\$ 2.94	\$ 0.00	\$ 44.88	CASH	08:57 AM	Completed
6OI-20230421115700424	Ritesh Patel	\$ 539.94	\$ 37.80	\$ 0.00	\$ 577.74	CASH	08:57 AM	Completed
6OI-20230421115352642	Ritesh Patel	\$ 1946.59	\$ 136.27	\$ 0.00	\$ 2082.86	CASH	08:53 AM	Completed
6OI-20230421115219756	Ritesh Patel	\$ 3599.60	\$ 251.97	\$ 0.00	\$ 3851.57	CASH	08:52 AM	Completed
6OI-20230421114857004	Ritesh Patel	\$ 45.79	\$ 3.25	\$ 0.00	\$ 49.04	CASH	08:48 AM	Completed

demo@stapops.com

6.1.2 Back Office - Print Order Receipt

To print an order/transaction receipt, select **Print**

Order Details

PatelProcessing Office
2974 N Expy
PHONE : (732) 401-7093
Sales Date : Apr 26, 2023 10:49 AM
POS Orderid : 7OI-20230426134911842
Register No. : 7

Name	Qty	Price
Test mp	1	\$ 0.00
SubTotal :		\$ 0.00
Discount :		\$ 0.00
Sales Tax :		\$ 0.00
Surcharge :		\$ 0.00
Total		\$ 0.00
Change Due		\$ 0.00
Grand Total		\$ 0.00

Other Details

CASH \$ 10.70

Barcode: 1700426118

7 Back Office - Inventory

From the RetailzPOS **Back Office**, click **Inventory** to access your store inventory module

Dashboard

Today Sales \$ 0.00
Yesterday Sales : \$ 0.00

Today Void \$ 0.00
Yesterday Void : \$ 0.00

Today Delete \$ 0.00
Yesterday Deleted : \$ 0.00

Today Return \$ 0.00
Yesterday Return : \$ 0.00

Sales Chart (Weekly)

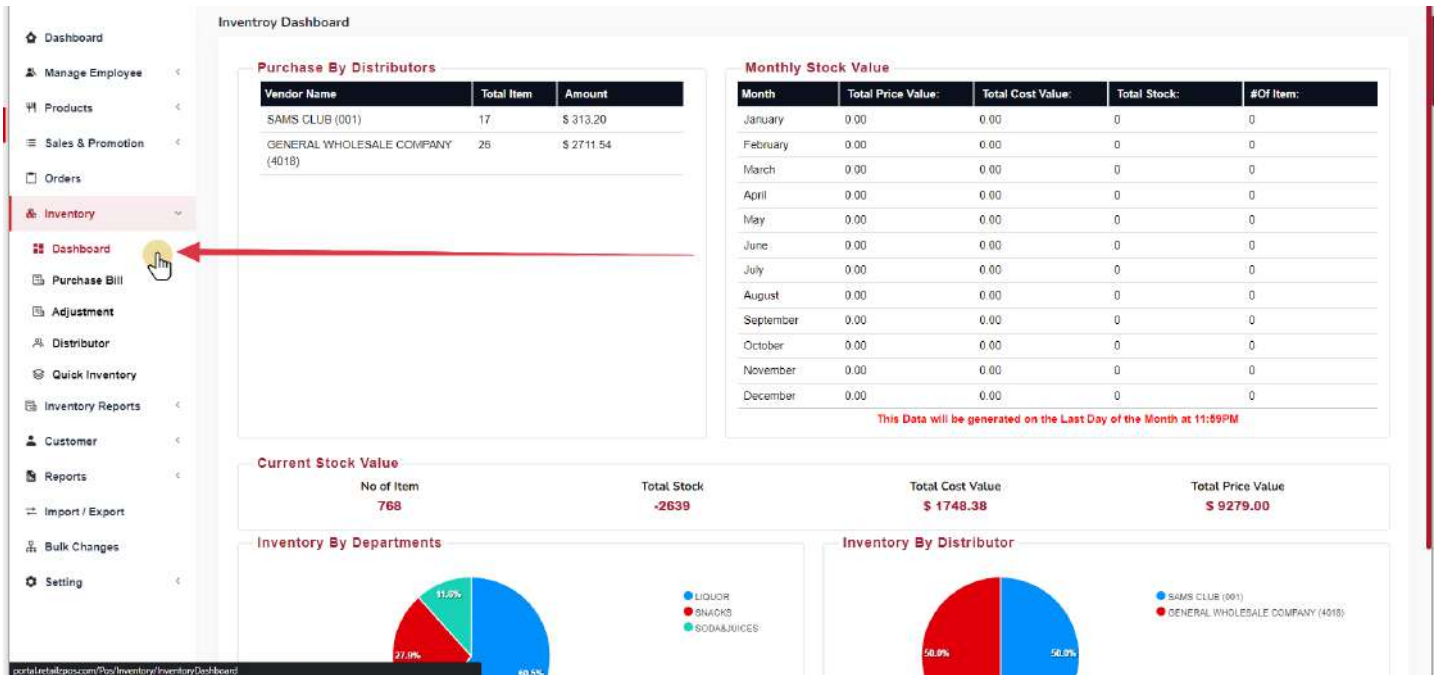
Net Revenue: \$ 0.00
Tax: \$ 0.00
Sales: \$ 0.00

Tender Wise (Monthly)

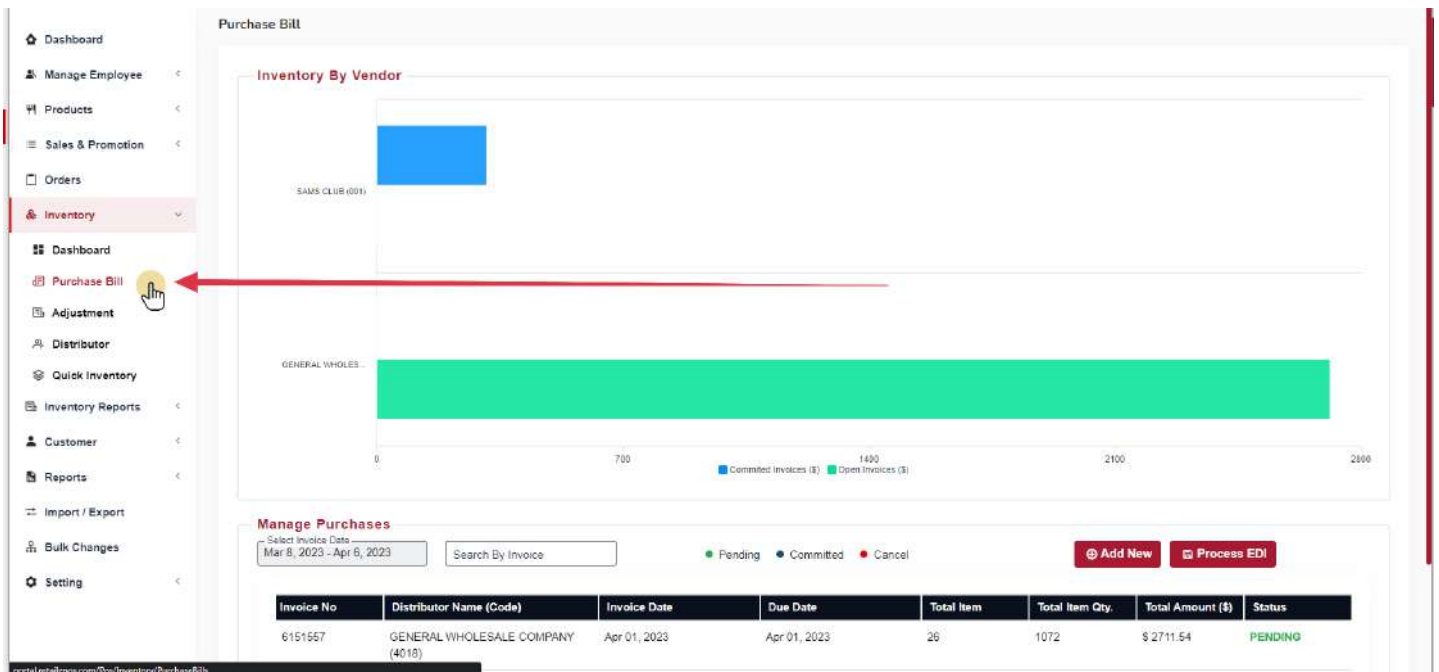
Top 10 Selling Item (Monthly)

Hourly Sales Reports (Daily)

7.1 Back Office - Inventory Dashboard



7.2 Back Office - Purchase Bill



7.2.1 Back Office - Create a Purchase Bill

To create a new purchase bill, click **Add New**

Purchase Bill

Inventory By Vendor

Pepsi Co (2)

Manage Purchases

Select Invoice Date: Mar 16, 2023 - Apr 14, 2023

Search By Invoice

● Pending ● Committed ● Cancel

Add New **Process EDI**

Invoice No	Distributor Name (Code)	Invoice Date	Due Date	Total Item	Total Item Qty.	Total Amount (\$)	Status
1234	Pepsi Co (2)	Mar 30, 2023	Mar 30, 2023	1	25	\$ 0.00	COMMITTED
75758	Coca Cola (1)	Mar 24, 2023	Mar 24, 2023	1	0	\$ 0.00	COMMITTED

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7.2.2 Back Office - Select Distributor for Purchase Bill

When creating a new purchase bill always begin with selecting the correct **Distributor**

Add PurchaseBill

Distributor Info

Select Distributor*

Search Here

Coca Cola

Pepsi Co

Select Invoice Date: Apr 08, 2023 - Apr 14, 2023

Invoice Number*

Delivery Date: Apr 14, 2023

Item Distributor Code

Search By Item Name

Search By SKU

Search By UPC

Item Name

Item Distributor Code

SKU

UPC

Select Department

Select Category

Select Item Size

Select Item Pack

Current Markup (%)

Current Margin (%)

Select Item Group

Select Tax

GOH

Data Received

Units Received

Case Received

Units In Case

Units Cost (\$)

Case Cost (\$)

Total Amt. (\$)

Free QTY

Free QTY Tax (\$)

Last Case Cost (\$)

Last Cost (\$)

Avg Cost (\$)

Last Price (\$)

SGST Price (\$)

Discount (\$)

New Price (\$)

Clear **Add To Purchase Bill**

Ordered Item

Total Items: 0 Total Unit QTY: 0 Total Case QTY: 0 Total Payable: \$0.00

● Unchanged ● Increased ● Decreased

Remove All **Save** **Commit**

Search By SKU

Search By UPC

Search By Item Distributor Code

Search By Item Name

S#f	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost	Case Cost	RIP	Free QTY	Free QTY Tax	Last Cost	GOH	Total Cost	Last Price	Retail Price
No Item Selected!																


7.2.3 Back Office - Provide Purchase Bill Invoice Number

When inputting a purchase bill, always make sure your **invoice number** matches the number provided by your vendor

Add PurchaseBill

Distributor Info

Select Distributor *
Coca Cola x

Invoice Number * 

Bill Date *
Apr 14, 2023

Delivery Date *
Apr 14, 2023

Item History

Select Items
Apr 08, 2023 - Apr 14, 2023

Date	Invoice #	Unit QTY	Case QTY	Unit Cost	Case Cost
No Data Found!					

Item Details

Item Distributor Code

Search By Item Name

Search By SKU

Search By UPC

Item Name

Item Distributor Code

SKU

UPC

Select Department

Select Category

Select Item Size

Select Item Pack

Current Markup (%)

Current Margin (%)

0 Select Item Group

0 Select Tax

Financials

QOH

Data Received

Units Received

Case Received

Units In Case

Units Cost (\$)

Case Cost (\$)

Total Amt. (\$)

Free QTY

Free QTY Tax (\$)

Last Case Cost (\$)

Last Cost (\$)

Avg Cost (\$)

Last Price (\$)

SGST Price (\$)

Discount (\$)

New Price (\$)

Buttons: Clear, Add To Purchase Bill

Ordered Item

Total Items: 0 Total Unit QTY: 0 Total Case QTY: 0 Total Payable: \$0.00

● Unchanged ● Increased ● Decreased

Remove All Save Commit

Search By SKU

Search By UPC

Search By Item Distributor Code

Search By Item Name

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	RIP (\$)	Free QTY	Free QTY Tax (\$)	Last Cost (\$)	QOH	Total Cost (\$)	Last Price (\$)	Retail Price (\$)
No Item Selected!																

7.2.4 Back Office - Purchase Bill Item Selection

When entering a purchase bill, search for the item by its **Name**; **UPC**; **SKU**; or **Item Distributor Code**

The screenshot displays the 'Add PurchaseBill' interface. On the left is a sidebar menu with options: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, and Inventory (selected). The main content area is divided into several sections:

- Distributor Info:** Includes a dropdown for 'Select Distributor' (Coca Cola), an 'Invoice Number' field (123456), a 'Bill Date' field (Apr 14, 2023), and a 'Delivery Date' field (Apr 14, 2023).
- Item History:** A table with columns: Date, Invoice #, Unit QTY, Case QTY, Unit Cost, Case Cost. It shows 'No Data Found!'.
- Search Section:** Features a 'Search By Item Name' field with a yellow highlight and a hand cursor icon. Below it are 'Search By SKU' and 'Search By UPC' fields. To the right are 'Item Distributor Code' and 'Item Name' fields. Further right are 'SKU' and 'UPC' fields. Below these are dropdowns for 'Select Department', 'Select Category', 'Select Item Size', and 'Select Item Pack'. At the bottom are 'Current Markup (%)' and 'Current Margin (%)' fields, and two 'Select' dropdowns for 'Item Group' and 'Tax'.
- Ordered Item Section:** Includes a table with columns: Sr#, SKU, Distributor Code, Item Name, Size/Pack, Unit QTY, Case QTY, Unit Cost (\$), Case Cost (\$), RIP (\$), Free QTY, Free QTY Tax (\$), Last Cost (\$), QOH, Total Cost (\$), Last Price (\$), and Retail Price (\$). It shows 'No Item Selected!'.
- Summary and Actions:** At the bottom, there are buttons for 'Clear' and 'Add To Purchase Bill'.

7.2.5 Back Office - Add to Purchase Bill

When all item information in a purchase bill is entered, click on **Add to Purchase Bill** to add that item to the invoice

Add PurchaseBill

Distributor Info

Select Distributor * Coca Cola X

Invoice Number * 123456

Bill Date * Apr 14, 2023

Delivery Date Apr 14, 2023

Item History

Select Time Apr 08, 2023 - Apr 14, 2023

Date	Invoice #	Unit QTY	Case QTY	Unit Cost	Case Cost
No Data Found!					

Item Details

Item Distributor Code

Search By Item Name REDBULL 8OZ SUGER FREE

Search By SKU Search By UPC

Item Name REDBULL 8OZ SUGER FREE Item Distributor Code

SKU 205 UPC 81126910171

Select Department GROCERY NEW X Select Category DRINKS X

Select Item Size Select Item Pack

Current Markup (%) 0.00 Current Margin (%) 0.00

1 Select Item Group 1 Select Tax

Pricing

QOH 11 Data Received

Units Received 1 Case Received 5 Units In Case 5

Units Cost (\$) Case Cost (\$) Total Amt (\$) 0.00

Free QTY Free QTY Tax (\$)

Last Case Cost (\$) Last Cost (\$) 1.33

Avg Cost (\$) Last Price (\$) 3.50

SGST Price (\$) Discount (\$)

New Price (\$)

Buttons: Clear Add To Purchase Bill

Ordered Item

Total Items: 0 Total Unit QTY: 0 Total Case QTY: 0 Total Payable: \$ 0.00

Unchanged Increased Decreased

Remove All Save Commit

Search By SKU Search By UPC Search By Item Distributor Code Search By Item Name

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	RIP (\$)	Free QTY	Free QTY Tax (\$)	Last Cost (\$)	QOH	Total Cost (\$)	Last Price (\$)	Retail Price (\$)
No Item Selected!																

7.2.6 Back Office - Remove All from Purchase Bill

To remove all items from a purchase bill, click on **Remove All**

The screenshot shows the 'Inventory' section of the Back Office. The 'Ordered Item' table contains one item: REDBULL 80Z SUGER FREE. The 'Remove All' button is highlighted with a red arrow.

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	RP (\$)	Free QTY	Free QTYTax (\$)	Last Cost (\$)	QOH	Total Cost (\$)	Last Price (\$)	Retail Price (\$)
1	205		REDBULL 80Z SUGER FREE	12/33.8	1	0	0.00	0.00	0.00	0	0.00	1.33	11	0.00	3.50	0.00

7.2.7 Back Office - Save Purchase Bill

To save a purchase bill to edit later, click on **Save**

The screenshot shows the 'Inventory' section of the Back Office. The 'Ordered Item' table contains one item: REDBULL 80Z SUGER FREE. The 'Save' button is highlighted with a red arrow.

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	RP (\$)	Free QTY	Free QTYTax (\$)	Last Cost (\$)	QOH	Total Cost (\$)	Last Price (\$)	Retail Price (\$)
1	205		REDBULL 80Z SUGER FREE	12/33.8	1	0	0.00	0.00	0.00	0	0.00	1.33	11	0.00	3.50	0.00

7.2.8 Back Office - Commit Purchase Bill

To commit a purchase bill, click on **Commit**

The screenshot shows the 'Inventory' section of the Back Office. The 'Ordered Item' section displays a table with one item: REDBULL 80Z SUGER FREE. The 'Total Payable' is \$0.00. The 'Commit' button is highlighted with a red arrow.

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	RIP (\$)	Free QTY	Free QTY Tax (\$)	Last Cost (\$)	QOH	Total Cost (\$)	Last Price (\$)	Retail Price (\$)
1	205		REDBULL 80Z SUGER FREE	4-	1	0	0.00	0.00	0.00	0	0.00	1.33	12	0.00	3.50	0.00

7.2.9 Back Office - Confirm Commit Purchase Bill

To confirm committing a purchase bill, click on **YES**

The screenshot shows the 'Inventory' section of the Back Office. An 'Alert!' dialog box is displayed, asking 'Are you sure you wish to Commit Purchase Bill?'. The 'YES' button is highlighted with a red arrow.

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	RIP (\$)	Free QTY	Free QTY Tax (\$)	Last Cost (\$)	QOH	Total Cost (\$)	Last Price (\$)	Retail Price (\$)
1	205		REDBULL 80Z SUGER FREE	4-	1	0	0.00	0.00	0.00	0	0.00	1.33	12	0.00	3.50	0.00

7.2.10 Back Office - Fully Commit Purchase Bill

When fully committing a purchase bill, always make sure your bill on the POS matches all information provided from your vendor, then click on **Commit**

Commit/Review Purchase Bill

Invoice Number: 123456

Total Items: 1 Total Unit QTY: 1 Total Case QTY: 0 Total Cost: \$0.00 Total Profit: \$0.00

Legend: Increased Cost (Red), Decreased Cost (Green), Child Item (Blue), Split-Pack (Grey)

Search By SKU: Search By UPC: Search By Item Distributor Code: Search By Item Name:

Sr#	SKU	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Last Cost (\$)	Case Cost (\$)	Last Price (\$)	Margin(%)	MarkUP(%)	SGST Price (\$)	New Price (\$)
1	205	REDBULL 80Z SUGER FREE	-/-	1	0	0.00	1.33	0.00	3.50	0.00	0.00	0.00	0.00

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7.3 Back Office - Quick Purchase Bill

To access your stores quick purchase bills, click **Quick Purchase Bill** under your inventory tab

Quick Add Purchase Bill

Distributor Info

Select Distributor* Invoice Number * Bill Date * Apr 27, 2023 Delivery Date Apr 27, 2023

Item Details

Item Distributor Code Search By Item Name Search By SKU Search By UPC

Units Received Units Cost (\$) Case Received Units In Case Case Cost (\$) Total Amt (\$) Free QTY Free QTY Tax (\$)

Ordered Item

Total Items: 0 Total Unit QTY: 0 Total Case QTY: 0 Total Payable: \$0.00

Search By SKU Search By UPC Search By Item Distributor Code Search By Item Name

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	RI P (\$)	Free QTY	Free QTY Tax (\$)	Current Cost (\$)	QOH	Total Cost (\$)	Current Price (\$)	New Price (\$)
No Item Selected!																

Buttons: Clear Add To Purchase Bill

7.3.1 Back Office - Quick Purchase Bill Distributor

When creating a new quick purchase bill always begin with selecting the correct **Distributor**

Quick Add Purchase Bill

Distributor Info

Select Distributor* Invoice Number * Bill Date * Apr 27, 2023 Delivery Date Apr 27, 2023

Item Details

Item Distributor Code Search By Item Name Search By SKU Search By UPC

Units Received Units Cost (\$) Case Received Units In Case Case Cost (\$) Total Amt (\$) Free QTY Free QTY Tax (\$)

Ordered Item

Total Items: 0 Total Unit QTY: 0 Total Case QTY: 0 Total Payable: \$0.00

Search By SKU Search By UPC Search By Item Distributor Code Search By Item Name

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	RI P (\$)	Free QTY	Free QTY Tax (\$)	Current Cost (\$)	QOH	Total Cost (\$)	Current Price (\$)	New Price (\$)
No Item Selected!																

Buttons: Clear Add To Purchase Bill

7.3.2 Back Office - Quick Purchase Bill Invoice Number

When inputting a quick purchase bill, always make sure your **invoice number** matches the number provided by your vendor

Quick Add Purchase Bill

Distributor Info

Select Distributor *
HLA

Invoice Number *

Bill Date *
Apr 27, 2023

Delivery Date
Apr 27, 2023

Item Details

Item Distributor Code

Search By Item Name

Search By SKU

Search By UPC

Units Received

Units Cost (\$)

Case Received

Units In Case

Case Cost (\$)

Total Amt. (\$)

Free QTY

Free QTY Tax (\$)

Ordered Item

Total Items: 0 Total Unit QTY: 0 Total Case QTY: 0 Total Payable: \$ 0.00

Unchanged Increased Decreased

Remove All Save Commit

Search By SKU

Search By UPC

Search By Item Distributor Code

Search By Item Name

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	RI P (\$)	Free QTY	Free QTY Tax (\$)	Current Cost (\$)	QOH	Total Cost (\$)	Current Price (\$)	New Price (\$)
No Item Selected!																

7.3.3 Back Office - Quick Purchase Bill Date

When inputting a quick purchase bill, always provide the correct **Bill Date**

The screenshot shows the 'Quick Add Purchase Bill' form. The 'Distributor Info' section includes a dropdown for 'Select Distributor' (HLA), an 'Invoice Number' field (123456), a 'Bill Date' field (Apr 27, 2023) which is highlighted with a red arrow, and a 'Delivery Date' field (Apr 27, 2023). The 'Item Details' section has search fields for 'Item Distributor Code', 'Search By Item Name', 'Search By SKU', and 'Search By UPC'. Below these are input fields for 'Units Received', 'Units Cost (\$)', 'Case Received', 'Units In Case', 'Case Cost (\$)', and 'Total Amt (\$)'. There are also fields for 'Free QTY' and 'Free QTY Tax (\$)'. At the bottom right of this section are 'Clear' and 'Add To Purchase Bill' buttons. The 'Ordered Item' section shows summary statistics: 'Total Items: 0', 'Total Unit QTY: 0', 'Total Case QTY: 0', and 'Total Payable: \$0.00'. It also has status indicators for 'Unchanged', 'Increased', and 'Decreased', and buttons for 'Remove All', 'Save', and 'Commit'. Below this are search fields for 'Search By SKU', 'Search By UPC', 'Search By Item Distributor Code', and 'Search By Item Name'. A table with 16 columns (Sr#, SKU, Distributor Code, Item Name, Size/Pack, Unit QTY, Case QTY, Unit Cost (\$), Case Cost (\$), RI P (\$), Free QTY, Free QTY Tax (\$), Current Cost (\$), QOH, Total Cost (\$), Current Price (\$), New Price (\$)) is shown, with the message 'No Item Selected!' below it.

7.3.4 Back Office - Quick Purchase Bill Item Search

When entering a quick purchase bill, search for the item by its **Name**; **UPC**; **SKU**; or **Item Distributor Code**

The screenshot shows the 'Quick Add Purchase Bill' form. The 'Distributor Info' section is the same as in the previous screenshot. The 'Item Details' section shows the 'Search By Item Name' field (MARLBORO 100 BOX (PA)) highlighted with a red arrow. Other search fields include 'Search By Item Distributor Code' (091123), 'Search By SKU' (21), and 'Search By UPC' (02820000363). The 'Ordered Item' section and table are also the same as in the previous screenshot.

7.3.5 Back Office - Add Item To Quick Purchase Bill

When all item information in a quick purchase bill is entered, click on **Add to Purchase Bill** to add that item to the invoice

Quick Add Purchase Bill

Distributor Info

Select Distributor * Invoice Number * Bill Date * Delivery Date *

Item Details

Item Distributor Code Search By Item Name Search By SKU Search By UPC

Units Received Units Cost (\$) Case Received Units In Case Case Cost (\$) Total Amt. (\$)

Free QTY Free QTY Tax (\$)

Ordered Item

Total Items: 0 Total Unit QTY: 0 Total Case QTY: 0 Total Payable: \$ 0.00

Unchanged Increased Decreased

Search By SKU Search By UPC Search By Item Distributor Code Search By Item Name

Sr#	SKU	Distributor Code	Item Name	Size/Pack	Unit QTY	Case QTY	Unit Cost (\$)	Case Cost (\$)	R/P (\$)	Free QTY	Free QTY Tax (\$)	Current Cost (\$)	QOH	Total Cost (\$)	Current Price (\$)	New Price (\$)
No Item Selected!																

7.3.6 Back Office - Save Quick Purchase Bill

To save a quick purchase bill to edit later, click on **Save**

The screenshot shows the 'Quick Add Purchase Bill' interface. On the left is a sidebar with navigation links: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory (highlighted), Dashboard, Purchase Bill, Quick Purchase Bill, Adjustment, Distributor, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main form is titled 'Quick Add Purchase Bill' and contains several sections:

- Distributor Info:** Includes fields for 'Select Distributor' (with a dropdown showing 'HLA'), 'Invoice Number' (123456), 'Bill Date' (Apr 27, 2023), and 'Delivery Date' (Apr 27, 2023).
- Item Details:** Includes search fields for 'Item Distributor Code', 'Search By Item Name', 'Search By SKU', and 'Search By UPC'. Below these are input fields for 'Units Received', 'Units Cost (\$)', 'Case Received', 'Units In Case', 'Case Cost (\$)', 'Total Amt. (\$)', 'Free QTY', and 'Free QTY Tax (\$)'.
- Ordered Item:** Displays summary statistics: 'Total Items: 0', 'Total Unit QTY: 0', 'Total Case QTY: 0', and 'Total Payable: \$0.00'. It also has status indicators for 'Unchanged' (blue dot), 'Increased' (red dot), and 'Decreased' (green dot). Action buttons include 'Remove All', 'Save' (highlighted with a red arrow), and 'Commit'.
- Search and Table:** Below the summary are search fields for 'Search By SKU', 'Search By UPC', 'Search By Item Distributor Code', and 'Search By Item Name'. Below these is a table with columns: S#r, SKU, Distributor Code, Item Name, Size/Pack, Unit QTY, Case QTY, Unit Cost (\$), Case Cost (\$), RI P (\$), Free QTY, Free QTY Tax (\$), Current Cost (\$), QOH, Total Cost (\$), Current Price (\$), and New Price (\$). The table currently shows 'No Item Selected!'.

At the bottom right of the 'Ordered Item' section, there are buttons for 'Clear', 'Add To Purchase Bill', 'Save', and 'Commit'. The 'Save' button is highlighted with a red arrow.

7.3.7 Back Office - Commit Quick Purchase Bill

To commit a quick purchase bill, click on **Commit**

This screenshot is identical to the one in section 7.3.6, showing the 'Quick Add Purchase Bill' interface. The only difference is that the 'Commit' button in the 'Ordered Item' section is now highlighted with a red arrow, indicating the next step in the process.

7.4 Back Office - Adjustment

To view your store inventory adjustments, click **adjustments** under the inventory tab

Adjustments

Select Period:
Mar 16, 2023 - Apr 14, 2023

Manage Adjustments

Add Total: 0

Batch ID	Seq. #	Batch Date	# of Items	Sending Store	Receiving Store	Reason	Status
No Data							

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7.4.1 Back Office - Create Inventory Adjustment

To create an inventory adjustment, click **Add**

Adjustments

Select Period:
Mar 19, 2023 - Apr 17, 2023

Manage Adjustments

Add Total: 0

Batch	Seq. #	Batch Date	# of Items	Sending Store	Receiving Store	Reason	Status
No Data							

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7.4.2 Back Office - Inventory Adjustment Select Type

When creating a new inventory adjustment, always select the **adjustment type**

The screenshot shows the 'Add Adjustment' form. On the left is a sidebar with navigation links: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory (highlighted), Distributor, Quick Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main form has several sections:

- Adjustment ID** and **Adjustment Date** (Apr 17, 2023).
- Select Adjustment Type*** (highlighted with a red arrow and a hand icon).
- Select Reason***.
- Note**.
- Store-To-Store-Transfer** section with dropdowns for **Select Sending Store** and **Select Receiving Store**.
- Item Distributor Code** and **Search By Item Name**.
- Search By SKU** and **Search By UPC**.
- Item Name** and **Select Department**.
- Select Category** and **Select Item Size**.
- Select Item Pack**.
- QOH** and **Units In Case**.
- Unit QTY** and **Case QTY**.
- Unit Cost (\$)** and **Case Cost (\$)**.
- Markup (%)** and **Margin (%)**.
- Store-To-Store-Transfer** section with **Select Adjustment By** and **Cost (\$)** and **Adjustment Qty ***.
- Add** button.
- Adjusted Item** section with **Total Items**, **Total Unit QTY**, **Total Case QTY**, and **Total Payable**.
- Remove All**, **Save & Close**, and **Commit** buttons.
- Table** with columns: Sr#, SKU, Item Name, Prod Code, Size/Pack, Unit QTY, Case QTY, QOH, Adj Stock, Curr. QOH, Case/Unit, Cost, Total Cost. The table is currently empty with the message 'No Item Selected!'.

7.4.3 Back Office - Inventory Adjustment Select Reason

When creating a new adjustment, provide a **reason** for the adjustment

This screenshot is similar to the previous one, showing the 'Add Adjustment' form. The red arrow now points to the **Select Reason*** dropdown menu, which is currently set to 'IN'. The rest of the form and sidebar are identical to the previous screenshot.

7.4.4 Back Office - Inventory Adjustment Search Item

To filter an item for adjustment, search by either **Item Distributor Code**, **Item Name**, **SKU**, or **UPC**

7.4.5 Back Office - Inventory Adjustment Store-To-Store Transfer

For Store-To-Store Adjustments, **Select Adjustment By**

7.4.6 Back Office - Inventory Adjustment Quantity of Item

Enter inventory **Adjustment Quantity**

7.4.7 Back Office - Inventory Adjustment Add Item

To add item for inventory adjustment, select **Add**

7.4.8 Back Office - Inventory Adjustment Save & Close

To save and continue your inventory adjustment at a later time, click **Save & Close**

Add Adjustment

Adjustment ID: Adjustment Date: Apr 17, 2023

Select Adjustment Type: x

Select Reason: x

Note:

Store-To-Store-Transfer

Select Sending Store:

Select Receiving Store:

Item Distributor Code:

Search By Item Name:

Search By SKU: Search By UPC:

Item Name: Select Department:

Select Category: Select Item Size:

Select Item Pack:

QOH: Units in Case:

Unit QTY: Case QTY:

Unit Cost (\$): Case Cost (\$):

Markup (%): Margin (%):

Store-To-Store-Transfer

Select Adjustment By: x

Cost (\$): Adjustment Qty:

Adjusted Item

Total Items: 1 Total Unit QTY: 5 Total Case QTY: 0 Total Payable: \$0.00

Sr#	SKU	Item Name	Prod Code	Size/Pack	Unit QTY	Case QTY	QOH	Adj Stock	Curr. QOH	Case/Unit	Cost	Total Cost
1	114	HERSHEY'S MILK CHOCO 1.55	- / -	0	0	0	5	0	0	UNIT	0.00	0.00

7.4.9 Back Office - Inventory Adjustment Save Confirmation

When saving an inventory adjustment, confirm your save by selecting **YES**

Add Adjustment

Adjustment ID: Adjustment Date: Apr 17, 2023

Select Adjustment Type: x

Select Reason: x

Note:

Store-To-Store-Transfer

Select Sending Store:

Select Receiving Store:

Item Distributor Code:

Search By Item Name:

Search By SKU: Search By UPC:

Item Name: Select Department:

Select Category: Select Item Size:

Select Item Pack:

QOH: Units in Case:

Unit QTY: Case QTY:

Unit Cost (\$): Case Cost (\$):

Markup (%): Margin (%):

Store-To-Store-Transfer

Select Adjustment By: x

Cost (\$): Adjustment Qty:

Adjusted Item

Total Items: 1 Total Unit QTY: 5 Total Case QTY: 0 Total Payable: \$0.00

Sr#	SKU	Item Name	Prod Code	Size/Pack	Unit QTY	Case QTY	QOH	Adj Stock	Curr. QOH	Case/Unit	Cost	Total Cost
1	114	HERSHEY'S MILK CHOCO 1.55	- / -	0	0	0	5	0	0	UNIT	0.00	0.00

Alert!

Are you sure you wish to Save Adjustment?

7.4.10 Back Office - Edit Inventory Adjustment

To edit an inventory adjustment, click on the **green** edit button

The screenshot shows the 'Adjustments' page in the Back Office. On the left is a sidebar menu with options like Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, and others. The 'Inventory' section is expanded, showing sub-options like Dashboard, Purchase Bill, Adjustment, Distributor, Quick Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main content area is titled 'Adjustments' and includes a 'Select Period' dropdown set to 'Mar 19, 2023 - Apr 17, 2023'. Below this is a 'Manage Adjustments' section with an 'Add' button and a 'Total: 1' indicator. A table lists the adjustments with columns: Batch ID, Seq. #, Batch Date, # of Items, Sending Store, Receiving Store, Reason, and Status. The first row has Batch ID 1, Seq. # 1, Batch Date Apr 17, 2023, # of Items 1, Sending Store 'Matts RetailzPOS Demo', Receiving Store 'Matts RetailzPOS Demo', Reason 'CUSTOM', and Status 'G'. A red arrow points to the green edit button in the Status column of this row.

Batch ID	Seq. #	Batch Date	# of Items	Sending Store	Receiving Store	Reason	Status
1	1	Apr 17, 2023	1	Matts RetailzPOS Demo	Matts RetailzPOS Demo	CUSTOM	G

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7.4.11 Back Office - Delete Inventory Adjustment

To delete an inventory adjustment, click on the **red** trash can button

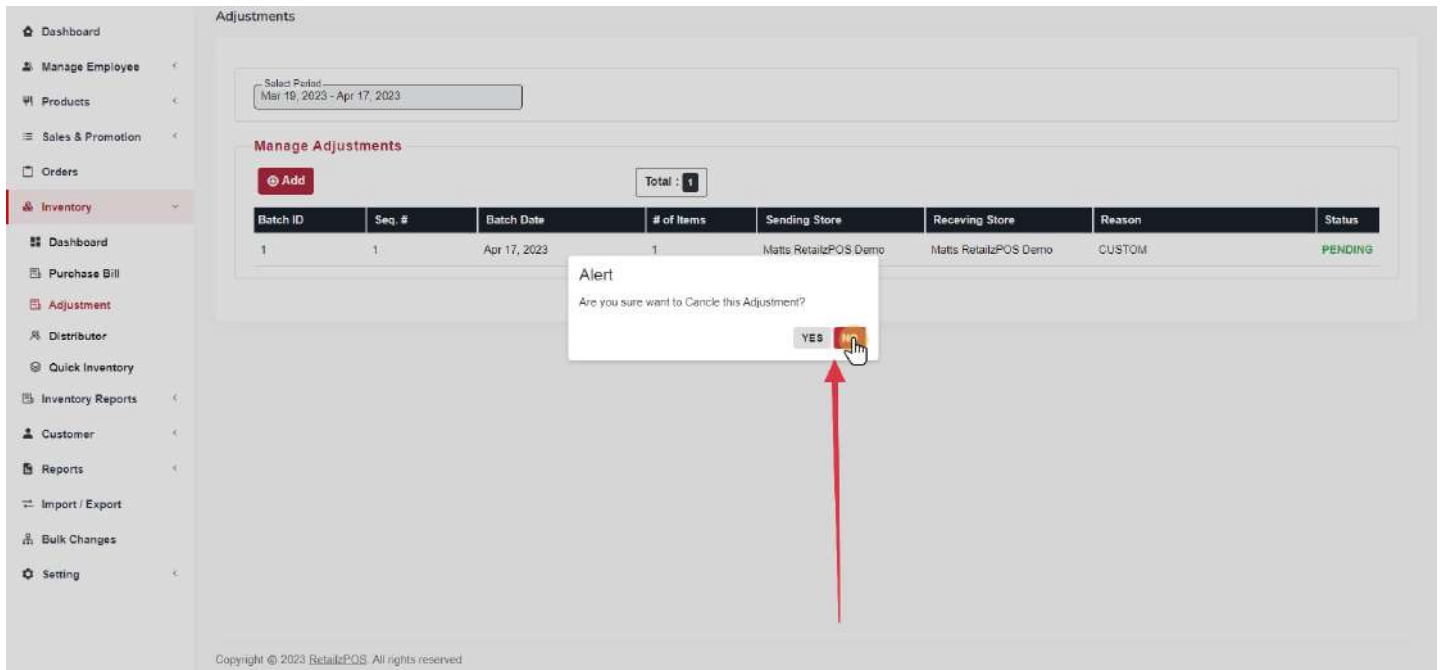
This screenshot is identical to the one above, showing the 'Adjustments' page. However, a red arrow points to the red trash can button in the Status column of the first row, indicating the action to delete the adjustment.

Batch ID	Seq. #	Batch Date	# of Items	Sending Store	Receiving Store	Reason	Status
1	1	Apr 17, 2023	1	Matts RetailzPOS Demo	Matts RetailzPOS Demo	CUSTOM	G

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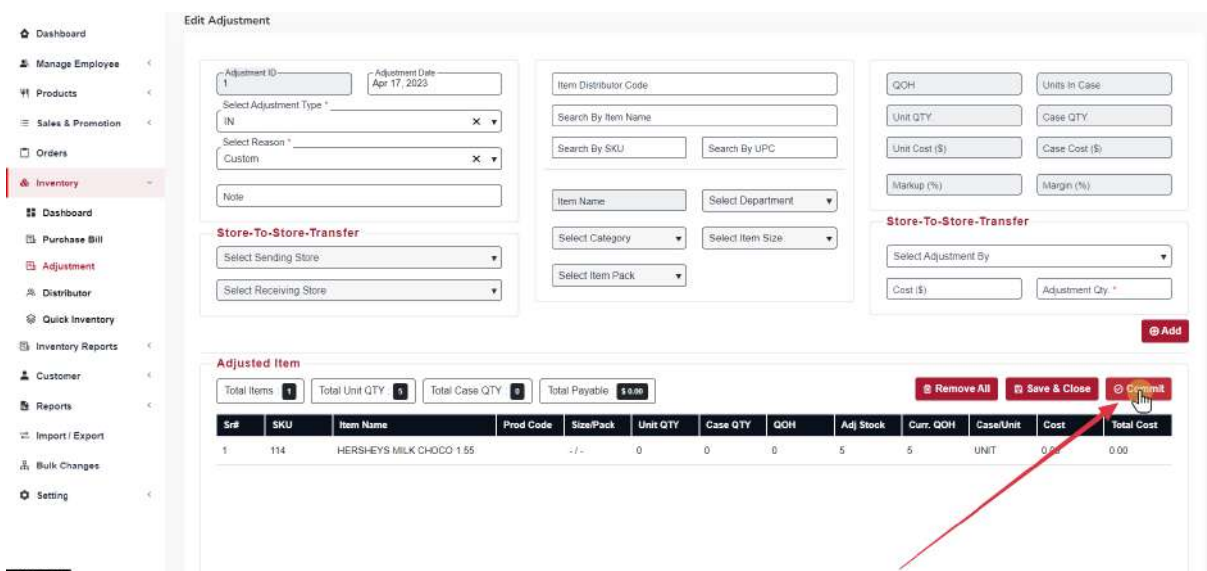
7.4.12 Back Office - Delete Inventory Adjustment Confirmation

To confirm inventory adjustment deletion, select **YES**



7.4.13 Back Office - Commit Inventory Adjustment

To commit an inventory adjustment, click on **Commit**



7.4.14 Back Office - Confirm Commit Inventory Adjustment

To confirm commit inventory adjustment, click **YES**

The screenshot shows the 'Edit Adjustment' form in the Back Office. An alert dialog box is displayed in the center, asking 'Are you sure you wish to Commit Adjustment?'. The 'YES' button is highlighted with a red arrow. The form includes fields for Adjustment ID, Adjustment Date, Item Distributor Code, Search By Item Name, Search By SKU, Search By UPC, Item Name, Select Department, and various quantity and cost fields. A table at the bottom shows the 'Adjusted Item' details.

Sr#	SKU	Item Name	Prod Code	Size/Pack	Unit QTY	Case QTY	QOH	Adj Stock	Curr. QOH	Case/Unit	Cost	Total Cost
1	114	HERSHEY'S MILK CHOCO 1.55	- / -	0	0	0	5	5	UNIT	0.00	0.00	

7.5 Back Office - Distributor

To view your store distributors, click **Distributors** under the inventory tab

The screenshot shows the 'Distributor' form in the Back Office. A red arrow points to the 'Distributor' link in the left sidebar. The form displays a table of distributors with columns for Name, Distributor ID, Email, Phone No., and Status. The 'Distributor' link is highlighted with a red arrow.

Name	Distributor ID	Email	Phone No.	Status
Peppi Co	2	-	(123) 456-7890	ACTIVE
Coca Cola	1	-	(123) 123-1234	ACTIVE

7.5.1 Back Office - Add a Distributor

To add a new distributor, click **Add**

Distributor

Active In-Active Total: 2

Name	Distributor ID	Email	Phone No.	Status
Pepsi Co.	2	-	(123) 456-7890	ACTIVE
Coca Cola	1	-	(123) 123-1234	ACTIVE

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7.5.2 Back Office - Enter Distributor Name

When entering a new distributor, provide a distributor **name**

Add My Distributor

PERSONAL DETAILS

Distributor Name * Short Name Distributor ID *

First Name Last Name Email

Phone No. Select PayTerm Note

LOCATION DETAILS

Address 1 Address 2

Zip Code City State

Select Country Fax

Submit

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7.5.3 Back Office - Enter Distributor ID

When entering a new distributor, provide a distributor code

The screenshot shows the 'Add My Distributor' form in the Back Office. The form is divided into two sections: 'PERSONAL DETAILS' and 'LOCATION DETAILS'. In the 'PERSONAL DETAILS' section, the 'Distributor ID' field is highlighted with a yellow circle, and a red arrow points to it from the bottom right. The 'Distributor ID' field is labeled 'Distributor ID *' and has a placeholder 'Example'. Other fields in this section include 'Distributor Name *' (placeholder 'Example'), 'Short Name', 'First Name', 'Last Name', 'Email', 'Phone No. *', 'Select PayTerm' (a dropdown menu), and 'Note'. The 'LOCATION DETAILS' section includes 'Address 1', 'Address 2', 'Zip Code', 'City', 'State', 'Select Country' (a dropdown menu), and 'Fax'. A 'Submit' button is located at the bottom right of the form. The background shows a sidebar with various menu items like 'Dashboard', 'Manage Employee', 'Products', 'Sales & Promotion', 'Orders', 'Inventory', 'Purchase Bill', 'Adjustment', 'Distributor', 'Quick Inventory', 'Inventory Reports', 'Customer', 'Reports', 'Import / Export', 'Bulk Changes', and 'Setting'. The 'Inventory' menu item is currently selected.

7.5.4 Back Office - Enter Distributor Phone Number

When entering a new distributor, provide a **phone number**

The screenshot shows the 'Add My Distributor' form in the Back Office, similar to the previous one. In this instance, the 'Phone No. *' field in the 'PERSONAL DETAILS' section is highlighted with a yellow circle, and a red arrow points to it from the bottom left. The 'Phone No. *' field is labeled 'Phone No. *' and has a placeholder 'Example'. Other fields in this section include 'Distributor Name *' (placeholder 'Example'), 'Short Name', 'Distributor ID *' (placeholder 'Example'), 'First Name', 'Last Name', 'Email', and 'Note'. The 'LOCATION DETAILS' section includes 'Address 1', 'Address 2', 'Zip Code', 'City', 'State', 'Select Country' (a dropdown menu), and 'Fax'. A 'Submit' button is located at the bottom right of the form. The background shows the same sidebar with various menu items, and the 'Inventory' menu item is currently selected.

7.5.5 Back Office - Save Distributor Information

To save your new distributor, click **Submit**

Add My Distributor

PERSONAL DETAILS

Distributor Name * Example Short Name Distributor ID * Example

First Name Last Name Email

Phone No * (199) 999-9999 Select PayTerm Note

LOCATION DETAILS

Address 1 Address 2

Zip Code City State

Select Country Fax

Submit

7.5.6 Back Office - Deactivate Distributor

To deactivate a distributor, hover over the distributor and click the **blue** slider

Distributor

Active In-Active Total: 3

Name	Distributor ID	Email	Phone No.	Status
Example	Example	-	(199) 999-9999	ACTIVE
Pepsi Co	2	-	(123) 456-7890	ACTIVE
Coca Cola	1	-	(123) 123-1234	ACTIVE

7.5.7 Back Office - Confirm Distributor Deactivation

To confirm distributor deactivation, click **YES**

The screenshot shows the 'Distributor' management page. A table lists three distributors: 'Example', 'Pepsi Co', and 'Coca Cola', all with status 'ACTIVE'. An alert dialog box is displayed in the center, asking 'Are you sure want to Deactive undefined item?'. The dialog has two buttons: 'YES' (highlighted with a red arrow) and 'NO'. The left sidebar shows the 'Inventory' menu expanded, with 'Distributor' selected. The footer indicates 'Copyright © 2023 RetailPOS. All rights reserved'.

Name	Distributor ID	Email	Phone No.	Status
Example	Example	-	(199) 999-9999	ACTIVE
Pepsi Co	2	-	(123) 456-7890	ACTIVE
Coca Cola	1	-	(123) 123-1234	ACTIVE

7.5.8 Back Office - Activate Distributor

To activate a distributor, hover over the distributor and click the **grayed out slider**

The screenshot shows the 'Distributor' management page. The 'Example' distributor is now 'DEACTIVE'. A red arrow points to the 'DEACTIVE' status, which is a grayed-out slider. A green notification banner at the top right says 'Distributor Successfully Deactivated'. The left sidebar shows the 'Inventory' menu expanded, with 'Distributor' selected. The footer indicates 'Copyright © 2023 RetailPOS. All rights reserved'.

Name	Distributor ID	Email	Phone No.	Status
Example	Example	-	(199) 999-9999	DEACTIVE
Pepsi Co	2	-	(123) 456-7890	ACTIVE
Coca Cola	1	-	(123) 123-1234	ACTIVE

7.5.9 Back Office - Confirm Distributor Activation

To confirm distributor activation, click **YES**

The screenshot shows the 'Distributor' management page. A table lists distributors with columns: Name, Distributor ID, Email, Phone No., and Status. The table contains three entries: 'Example' (DEACTIVE), 'Pepsi Co' (ACTIVE), and 'Coca Cola' (ACTIVE). An alert dialog is displayed in the center, asking 'Are you sure want to Active undefined Item?'. The dialog has two buttons: 'YES' (highlighted with a red arrow) and 'NO'. A green notification banner at the top right says 'Distributor Successfully Activated'. The left sidebar shows the navigation menu with 'Inventory' selected.

Name	Distributor ID	Email	Phone No.	Status
Example	Example	-	(199) 999-9999	DEACTIVE
Pepsi Co	2	-	(123) 456-7890	ACTIVE
Coca Cola	1	-	(123) 123-1234	ACTIVE

7.5.10 Back Office - Edit Distributor

To edit a distributor, click on the **green** edit button

The screenshot shows the 'Distributor' management page. The table is the same as in the previous screenshot. A red arrow points to the 'Edit' button (a green circle with a pencil icon) located next to the 'Example' distributor row. The 'Status' column shows 'ACTIVE' for all distributors. A green notification banner at the top right says 'Distributor Successfully Activated'. The left sidebar shows the navigation menu with 'Inventory' selected.

Name	Distributor ID	Email	Phone No.	Status
Example	Example	-	(199) 999-9999	ACTIVE
Pepsi Co	2	-	(123) 456-7890	ACTIVE
Coca Cola	1	-	(123) 123-1234	ACTIVE

7.5.11 Back Office - Delete Distributor

To delete a vendor, click on the **red** trash can button

The screenshot shows the 'Distributor' management page. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory (selected), and a sub-menu for Inventory including Dashboard, Purchase Bill, Adjustment, Distributor, Quick Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area displays a table of distributors with columns: Name, Distributor ID, Email, Phone No., and Status. There are three distributors listed: 'Example' (ID: Example, Phone: (199) 999-9999), 'Pepsi Co' (ID: 2, Phone: (123) 456-7890), and 'Coca Cola' (ID: 1, Phone: (123) 123-1234). All are marked as 'ACTIVE'. Above the table are buttons for 'Add', 'Active', 'In-Active', and a trash can icon. A red arrow points from the bottom right towards the trash can icon in the first row.

Name	Distributor ID	Email	Phone No.	Status
Example	Example	-	(199) 999-9999	ACTIVE
Pepsi Co	2	-	(123) 456-7890	ACTIVE
Coca Cola	1	-	(123) 123-1234	ACTIVE

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7.5.12 Back Office - Confirm Distributor Deletion

To confirm distributor deletion, select **YES**

This screenshot shows the same 'Distributor' management page as before, but with an 'Alert' dialog box open in the center. The dialog box contains the text 'Alert' and 'Are You Sure want to delete this Distributor?'. It has two buttons: 'YES' (highlighted with a red arrow) and 'NO'.

Name	Distributor ID	Email	Phone No.	Status
Example	Example	-	(199) 999-9999	ACTIVE
Pepsi Co	2	-	(123) 456-7890	ACTIVE
Coca Cola	1	-	(123) 123-1234	ACTIVE

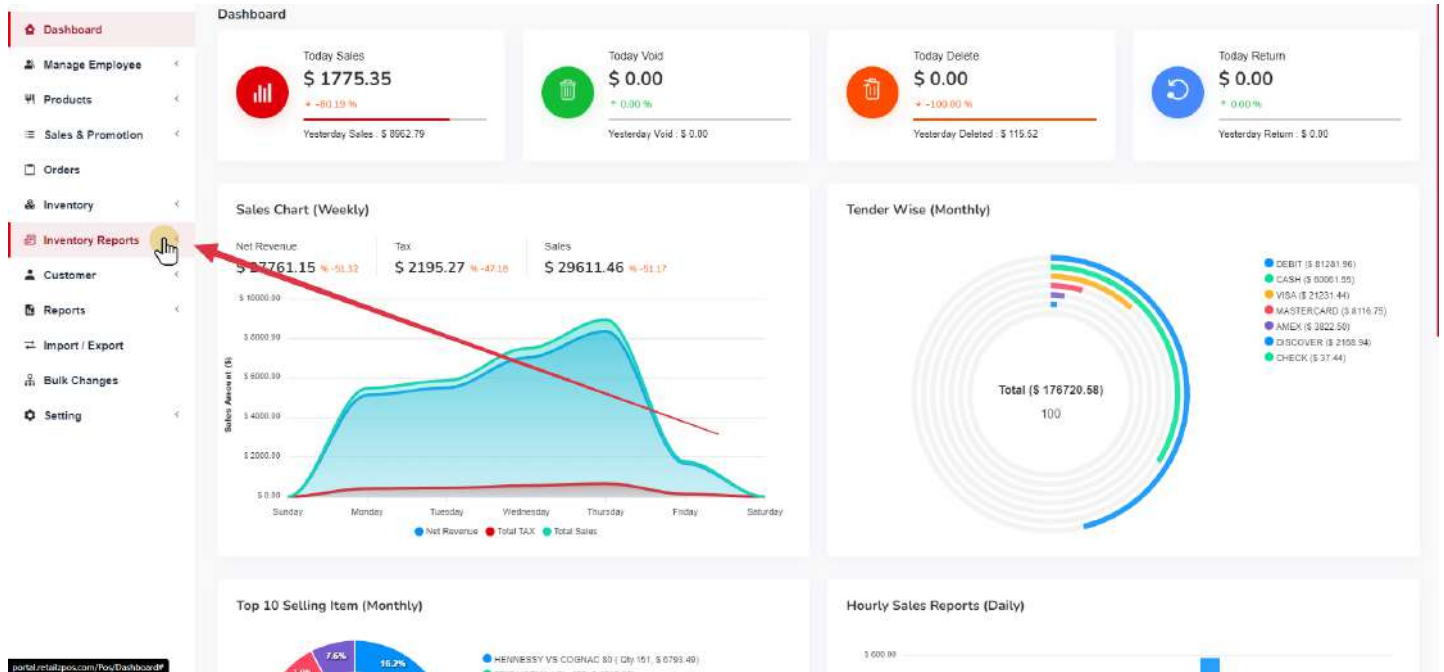
Alert
Are You Sure want to delete this Distributor?

YES NO

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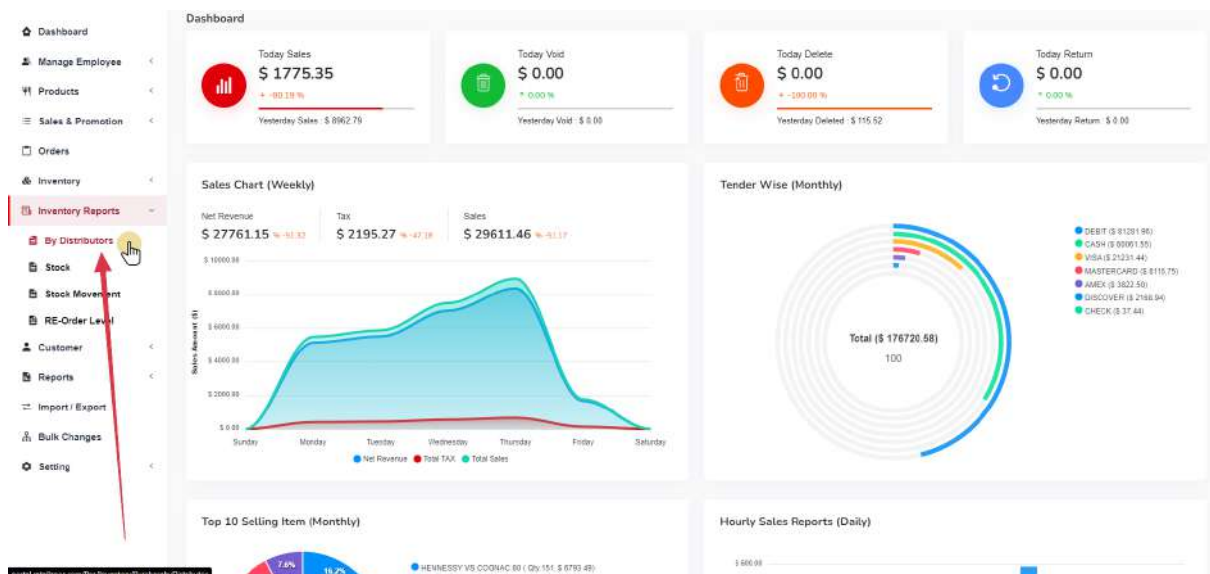
8 Back Office - Inventory Reports

From the RetailzPOS **Back Office**, click **Inventory Reports** to access your store inventory reports



8.1 Back Office - Inventory Reports By Distributor

To view your inventory reports by distributor, click **By Distributor** under your inventory reports



8.1.1 Back Office - Inventory Reports By Distributors Date Range

To filter you inventory reports by distributor date range, click on the **bill date period**

Purchase by Distributor

Select Bill Date Period: Apr 15, 2023 - Apr 21, 2023

ID	Distributor Code	Distributor Name	Bill Date	Qty. Received	Purchase Amount
▶ 139	13	ATLANTA BEVERAGE	Apr 16, 2023	172	\$ 1,847.55
▶ 150	08	EAGLE ROCK DISTRIBUTING	Apr 20, 2023	19	\$ 357.87
▶ 152	14	Empire	Apr 21, 2023	581	\$ 7,727.96
▶ 153	03	GENERAL WHOLESALE COMPANY	Apr 21, 2023	289	\$ 2,479.57
▶ 141	07	Macon Beverage	Apr 16, 2023	244	\$ 1,210.04
▶ 142	07	Macon Beverage	Apr 16, 2023	72	\$ 180.00
▶ 144	07	Macon Beverage	Apr 16, 2023	162	\$ 307.55
▶ 146	07	Macon Beverage	Apr 16, 2023	66	\$ 174.30
▶ 149	15	NORTHEAST SALES DISTRIBUTING INC	Apr 20, 2023	240	\$ 318.41
▶ 147	10	RNDC	Apr 20, 2023	825	\$ 12,108.82
Total:				4,094	\$ 45,511.06

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8.1.2 Back Office - Inventory Reports By Distributors Purchase Items

To view past purchased items by distributor, click the **red** triangle below the ID tab

Dashboard

Manage Employee

Products

Sales & Promotion

Orders

Inventory

Inventory Reports

By Distributors

Stock

Stock Movement

RE-Order Level

Customer

Reports

Import / Export

Bulk Changes

Setting

Purchase by Distributor

Select Bill Date Period
Apr 15, 2023 - Apr 21, 2023

ID	Distributor Code	Distributor Name	Bill Date	Qty. Received	Purchase Amount
139	13	ATLANTA BEVERAGE	Apr 16, 2023	172	\$ 1,047.55

SKU

Item Name

Size/Pack

Qty. Received

Purchase Amount

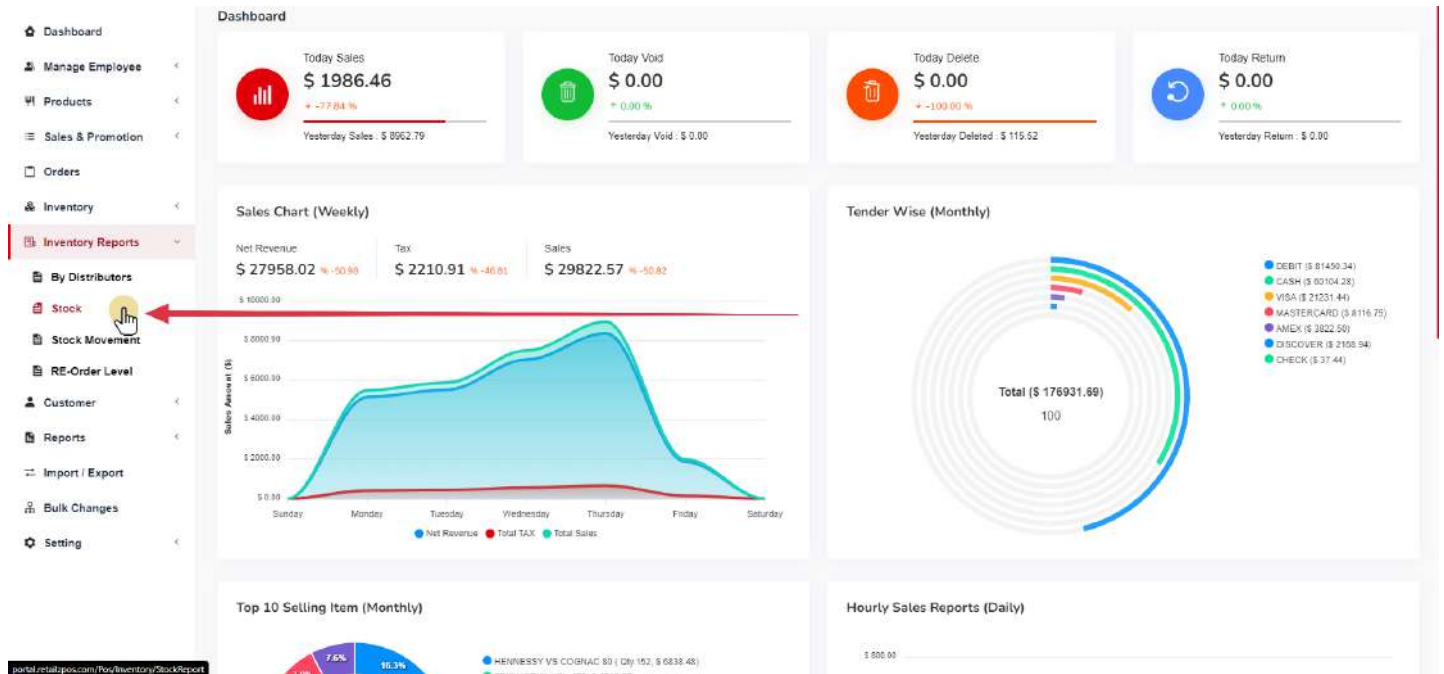
Average Price

3433	CUT WATER VODKA MULE	12 oz/4-PACK	18	\$ 9.88	\$ 9.84
7996	O'DOUL'S NON-ALCOHOLIC BEER	12 oz/6-PACK	4	\$ 6.79	\$ 6.79
14828	BOLD ROCK PINEAPPLE	12 oz/6-PACK	4	\$ 8.38	\$ 8.19
1541	BOLD ROCK PROSECCO	12 oz/6-PACK	8	\$ 14.77	\$ 11.39
7995	BUDWEISER BEER -NR	12 oz/6-PACK	4	\$ 6.95	\$ 6.95
13998	NATURAL LIGHT	12 oz/6-PACK	8	\$ 4.68	\$ 4.67
14002	BUD ICE	12 oz/6-PACK	8	\$ 18.70	\$ 18.70
7952	MICHELOB PRICKLY PEAR CAN	12 oz/12-PACK	10	\$ 14.13	\$ 14.13
7900	LANDSHARK LAGER NR	12 oz/12-PACK	4	\$ 13.55	\$ 13.67
7962	BUD LIGHT LIME BEER - NR	12 oz/12-PACK	4	\$ 13.55	\$ 13.55
7954	BUD LIGHT LIME BEER - CANS	12 oz/12-PACK	4	\$ 13.55	\$ 13.78
12662	BUD LIGHT PLATINUM CAN	12 oz/12-PACK	6	\$ 13.55	\$ 13.78
7988	NATURAL LIGHT	12 oz/12-PACK	6	\$ 10.03	\$ 9.49
Total:				4,094	\$ 45,511.06

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8.2 Back Office - Inventory Reports Stock

To view your inventory reports by stock, click **Stock** under your inventory reports



8.2.1 Back Office - Inventory Reports Stock Date Range

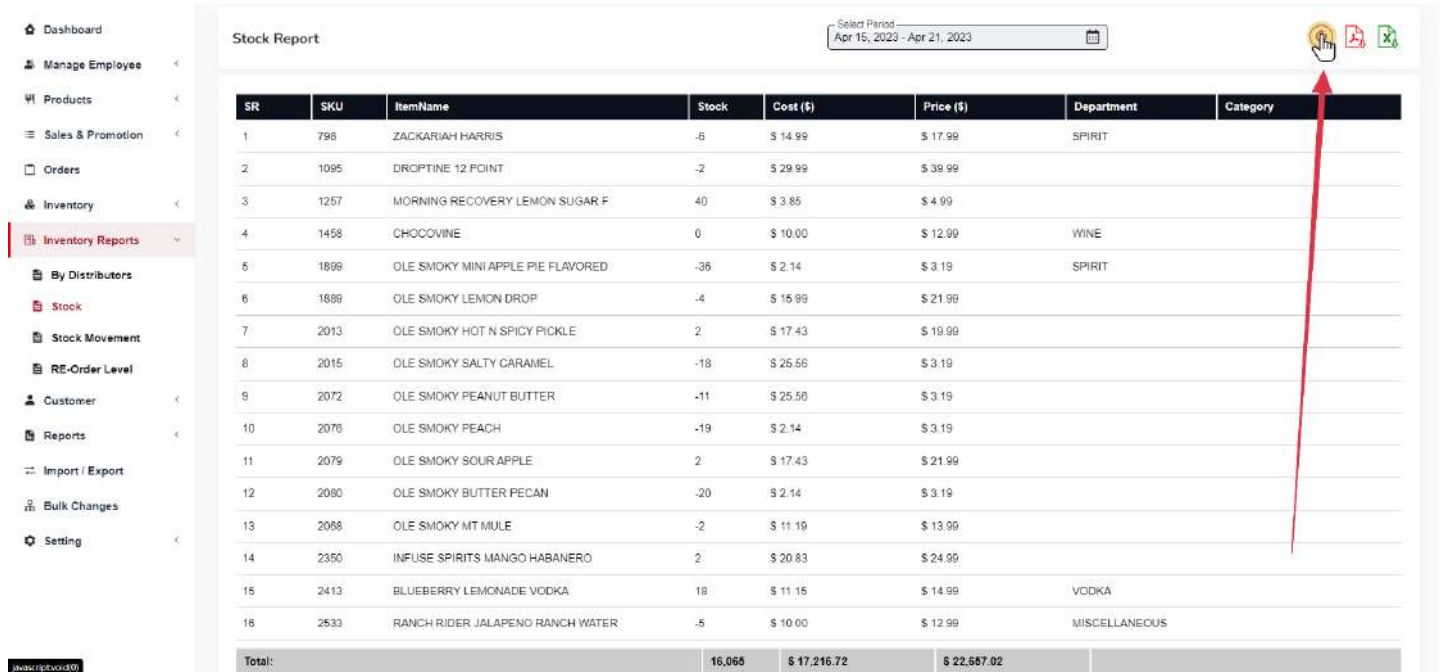
To filter you inventory reports stock date range, click on **select period**

The screenshot shows the Stock Report table with a date range filter set to 'Apr 15, 2023 - Apr 21, 2023'. A red arrow points to the 'select period' button. The table has the following columns: SR, SKU, ItemName, Stock, Cost (\$), Price (\$), Department, and Category.

SR	SKU	ItemName	Stock	Cost (\$)	Price (\$)	Department	Category
1	798	ZACKARIAH HARRIS	-6	\$ 14.99	\$ 17.99	SPIRIT	
2	1095	DROPTIME 12 POINT	-2	\$ 29.99	\$ 39.99		
3	1257	MORNING RECOVERY LEMON SUGAR F	40	\$ 3.85	\$ 4.99		
4	1458	CHOCOVINE	0	\$ 10.00	\$ 12.99	WINE	
5	1899	OLE SMOKY MINI APPLE PIE FLAVORED	-36	\$ 2.14	\$ 3.19	SPIRIT	
6	1889	OLE SMOKY LEMON DROP	-4	\$ 15.99	\$ 21.99		
7	2013	OLE SMOKY HOT N SPICY PICKLE	2	\$ 17.43	\$ 19.99		
8	2015	OLE SMOKY SALTY CARAMEL	-16	\$ 25.56	\$ 3.19		
9	2072	OLE SMOKY PEANUT BUTTER	-11	\$ 25.56	\$ 3.19		
10	2076	OLE SMOKY PEACH	-19	\$ 2.14	\$ 3.19		
11	2079	OLE SMOKY SOUR APPLE	2	\$ 17.43	\$ 21.99		
12	2080	OLE SMOKY BUTTER PECAN	-20	\$ 2.14	\$ 3.19		
13	2088	OLE SMOKY MT MULE	-2	\$ 11.19	\$ 13.99		
14	2350	INFUSE SPIRITS MANGO HABANERO	2	\$ 20.83	\$ 24.99		
15	2413	BLUEBERRY LEMONADE VODKA	18	\$ 11.15	\$ 14.99	VOODKA	
16	2533	RANCH RIDER JALAPENO RANCH WATER	-5	\$ 10.00	\$ 12.99	MISCELLANEOUS	
Total:			16,065	\$ 17,216.72	\$ 22,657.02		

8.2.2 Back Office - Inventory Reports Stock Refresh

To refresh your inventory report stock, click the **refresh** button

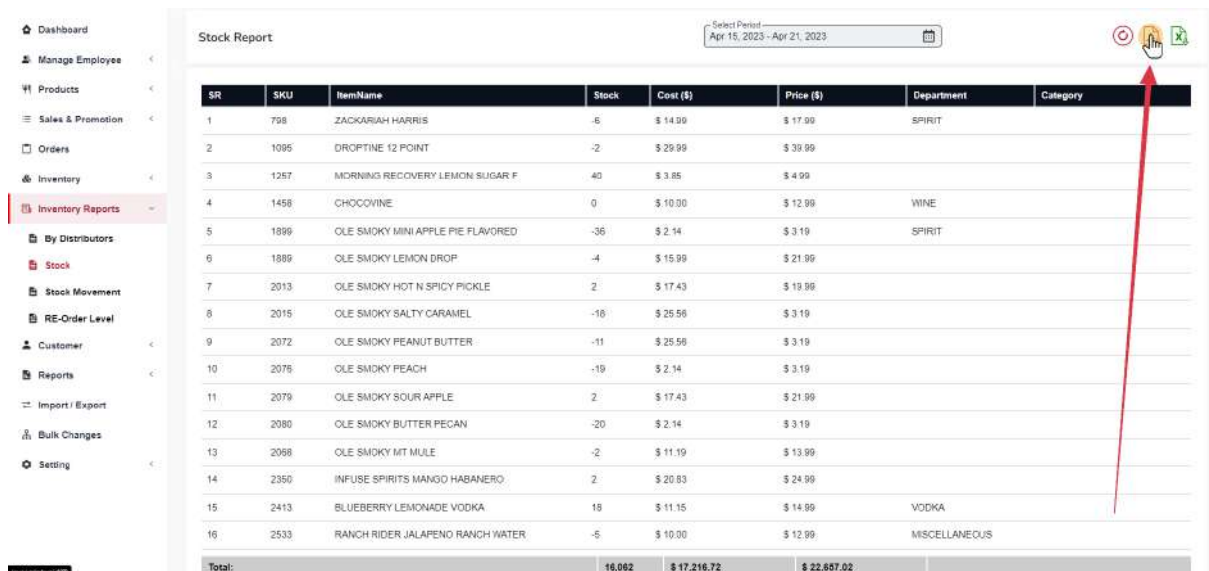


The screenshot shows the 'Stock Report' interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports (selected), By Distributors, Stock, Stock Movement, RE-Order Level, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area displays a table of inventory items with columns: SR, SKU, ItemName, Stock, Cost (\$), Price (\$), Department, and Category. A 'Select Period' dropdown is set to 'Apr 15, 2023 - Apr 21, 2023'. In the top right corner, there are three icons: a refresh icon (circular arrow), a PDF icon, and an export icon. A red arrow points to the refresh icon. The table contains 16 items, and a 'Total:' row at the bottom shows a stock count of 16,065, a total cost of \$17,216.72, and a total price of \$22,567.02.

SR	SKU	ItemName	Stock	Cost (\$)	Price (\$)	Department	Category
1	798	ZACKARIAH HARRIS	-6	\$ 14.99	\$ 17.99	SPIRIT	
2	1095	DROPTINE 12 POINT	-2	\$ 29.99	\$ 39.99		
3	1257	MORNING RECOVERY LEMON SUGAR F	40	\$ 3.85	\$ 4.99		
4	1458	CHOCOVINE	0	\$ 10.00	\$ 12.99	WINE	
5	1899	OLE SMOKY MINI APPLE PIE FLAVORED	-36	\$ 2.14	\$ 3.19	SPIRIT	
6	1889	OLE SMOKY LEMON DROP	-4	\$ 15.99	\$ 21.99		
7	2013	OLE SMOKY HOT N SPICY PICKLE	2	\$ 17.43	\$ 19.99		
8	2015	OLE SMOKY SALTY CARAMEL	-18	\$ 25.56	\$ 3.19		
9	2072	OLE SMOKY PEANUT BUTTER	-11	\$ 25.56	\$ 3.19		
10	2076	OLE SMOKY PEACH	-19	\$ 2.14	\$ 3.19		
11	2079	OLE SMOKY SOUR APPLE	2	\$ 17.43	\$ 21.99		
12	2080	OLE SMOKY BUTTER PECAN	-20	\$ 2.14	\$ 3.19		
13	2088	OLE SMOKY MT MULE	-2	\$ 11.19	\$ 13.99		
14	2350	INFUSE SPIRITS MANGO HABANERO	2	\$ 20.83	\$ 24.99		
15	2413	BLUEBERRY LEMONADE VODKA	18	\$ 11.15	\$ 14.99	VOODKA	
16	2533	RANCH RIDER JALAPENO RANCH WATER	-5	\$ 10.00	\$ 12.99	MISCELLANEOUS	
Total:			16,065	\$ 17,216.72	\$ 22,567.02		

8.2.3 Back Office - Inventory Reports Stock Export PDF

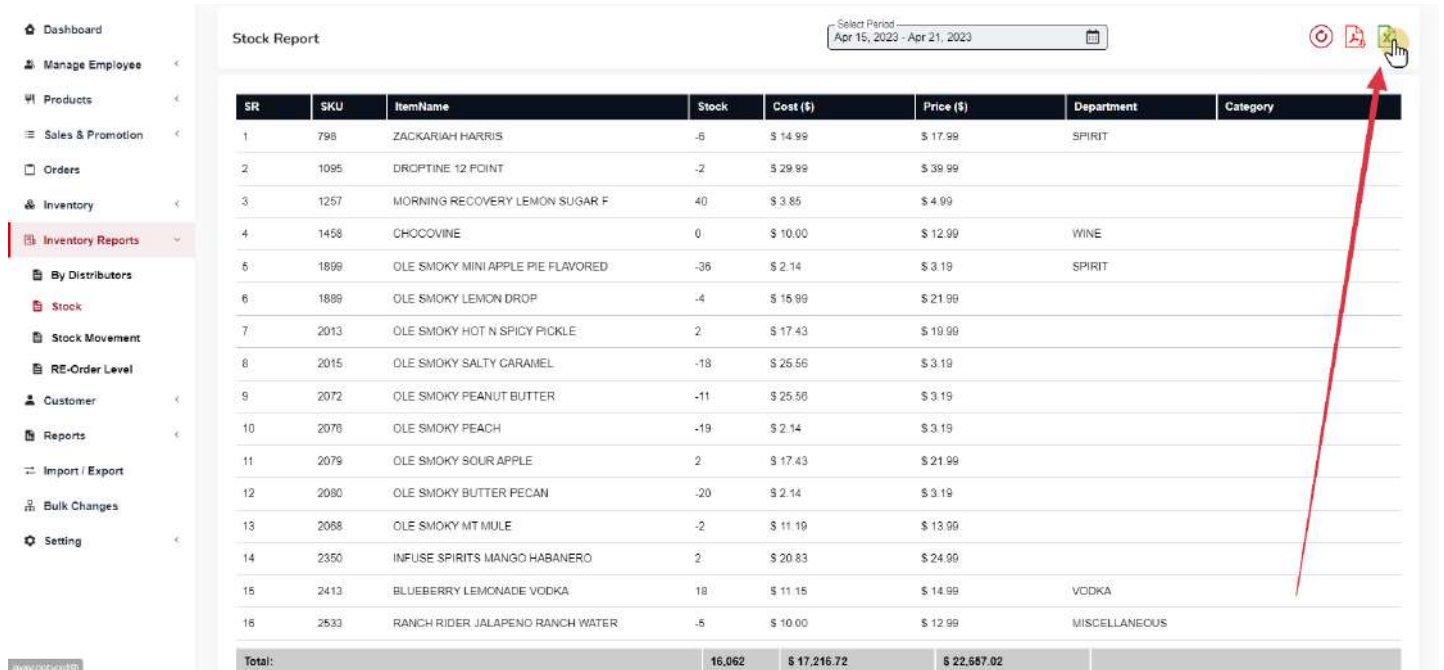
To export your inventory report stock as a .pdf file, click the **.PDF** button



This screenshot is identical to the one above, showing the 'Stock Report' interface. However, a red arrow points to the PDF icon (a document with a red 'X') in the top right corner, indicating the button to click for exporting the report as a PDF file. The table data and sidebar are the same as in the previous section.

8.2.4 Back Office - Inventory Reports Stock Export Excel

To export your inventory report stock as a .xls file, click the **Excel** button

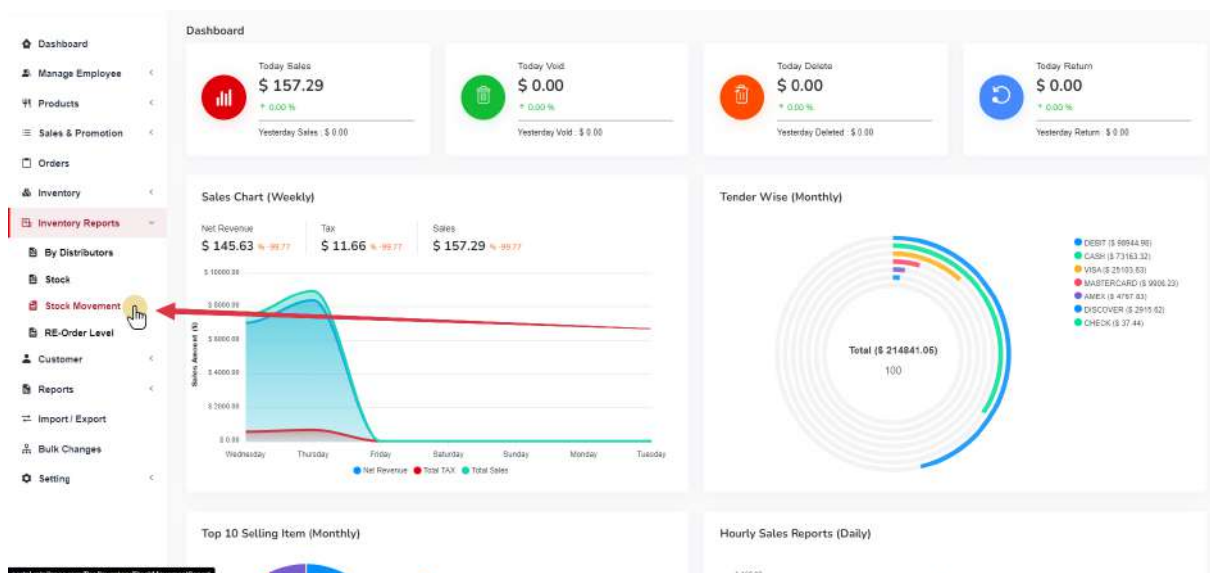


The screenshot shows the 'Stock Report' interface. On the left is a sidebar menu with options like Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports (selected), By Distributors, Stock, Stock Movement, RE-Order Level, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area displays a table with columns: SR, SKU, ItemName, Stock, Cost (\$), Price (\$), Department, and Category. The table lists 16 items, including ZACKARIAH HARRIS, DROPTINE 12 POINT, MORNING RECOVERY LEMON SUGAR F, CHOCOVINE, OLE SMOKY MINI APPLE PIE FLAVORED, OLE SMOKY LEMON DROP, OLE SMOKY HOT N SPICY PICKLE, OLE SMOKY SALTY CARAMEL, OLE SMOKY PEANUT BUTTER, OLE SMOKY PEACH, OLE SMOKY SOUR APPLE, OLE SMOKY BUTTER PECAN, OLE SMOKY MT MULE, INFUSE SPIRITS MANGO HABANERO, BLUEBERRY LEMONADE VODKA, and RANCH RIDER JALAPENO RANCH WATER. At the bottom, a 'Total:' row shows 16,062 items, a cost of \$17,216.72, and a price of \$22,567.02. In the top right corner, there are three icons: a circular arrow, a document, and an Excel icon. A red arrow points to the Excel icon.

SR	SKU	ItemName	Stock	Cost (\$)	Price (\$)	Department	Category
1	798	ZACKARIAH HARRIS	-6	\$ 14.99	\$ 17.99	SPIRIT	
2	1095	DROPTINE 12 POINT	-2	\$ 29.99	\$ 39.99		
3	1257	MORNING RECOVERY LEMON SUGAR F	40	\$ 3.85	\$ 4.99		
4	1458	CHOCOVINE	0	\$ 10.00	\$ 12.99	WINE	
5	1899	OLE SMOKY MINI APPLE PIE FLAVORED	-36	\$ 2.14	\$ 3.19	SPIRIT	
6	1889	OLE SMOKY LEMON DROP	-4	\$ 15.99	\$ 21.99		
7	2013	OLE SMOKY HOT N SPICY PICKLE	2	\$ 17.43	\$ 19.99		
8	2015	OLE SMOKY SALTY CARAMEL	-18	\$ 25.56	\$ 3.19		
9	2072	OLE SMOKY PEANUT BUTTER	-11	\$ 25.56	\$ 3.19		
10	2076	OLE SMOKY PEACH	-19	\$ 2.14	\$ 3.19		
11	2079	OLE SMOKY SOUR APPLE	2	\$ 17.43	\$ 21.99		
12	2080	OLE SMOKY BUTTER PECAN	-20	\$ 2.14	\$ 3.19		
13	2088	OLE SMOKY MT MULE	-2	\$ 11.19	\$ 13.99		
14	2350	INFUSE SPIRITS MANGO HABANERO	2	\$ 20.83	\$ 24.99		
15	2413	BLUEBERRY LEMONADE VODKA	18	\$ 11.15	\$ 14.99	VODKA	
16	2533	RANCH RIDER JALAPENO RANCH WATER	-5	\$ 10.00	\$ 12.99	MISCELLANEOUS	
Total:			16,062	\$ 17,216.72	\$ 22,567.02		

8.3 Back Office - Inventory Report Stock Movement

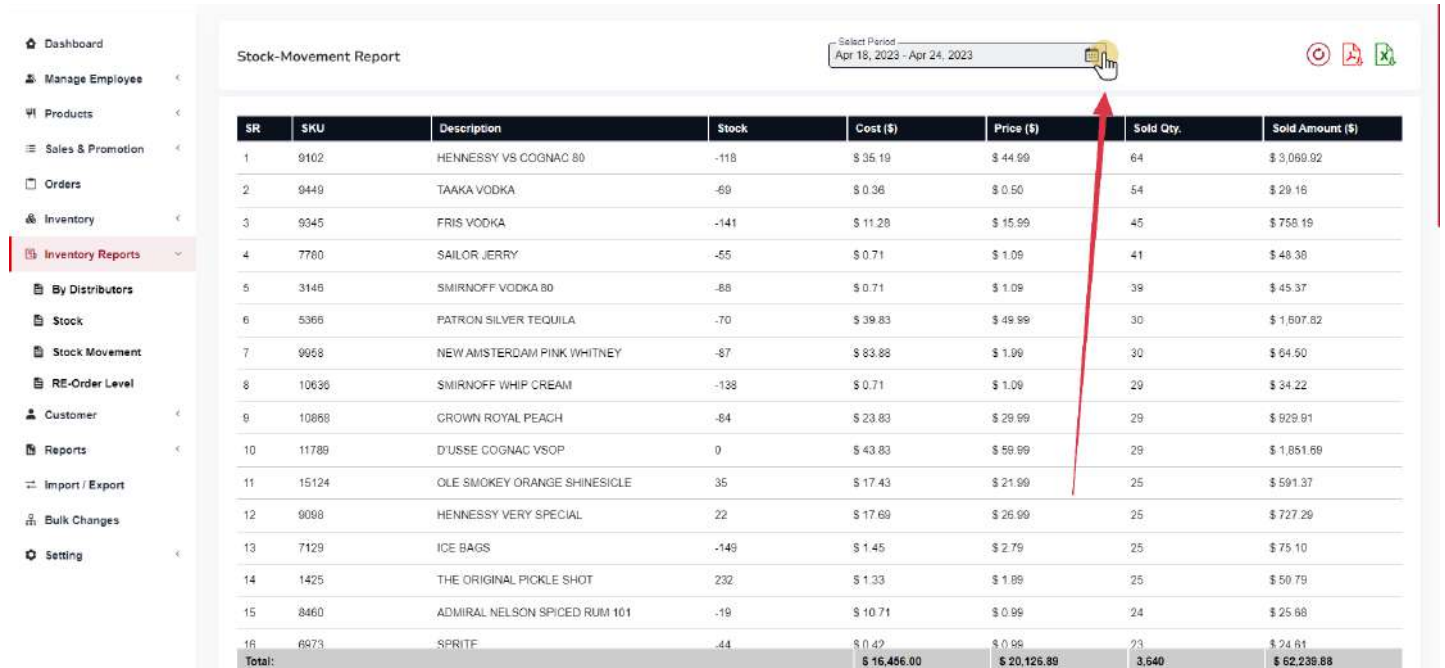
To view your inventory reports by stock movement, click **Stock Movement** under your inventory reports



The screenshot shows the 'Dashboard' interface. On the left is a sidebar menu with options like Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports (selected), By Distributors, Stock, Stock Movement (highlighted with a red arrow), RE-Order Level, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area displays several reports: 'Today Sales' (\$157.29), 'Today Void' (\$0.00), 'Today Debit' (\$0.00), and 'Today Return' (\$0.00). Below these are 'Sales Chart (Weekly)' and 'Tender Wise (Monthly)' charts. The 'Sales Chart (Weekly)' shows a line graph for Net Revenue, Total TAX, and Total Sales. The 'Tender Wise (Monthly)' shows a donut chart for various payment methods. At the bottom, there are sections for 'Top 10 Selling Item (Monthly)' and 'Hourly Sales Reports (Daily)'.

8.3.1 Back Office - Stock Movement Reports Date Range

To filter your inventory reports stock date range, click on **select period**

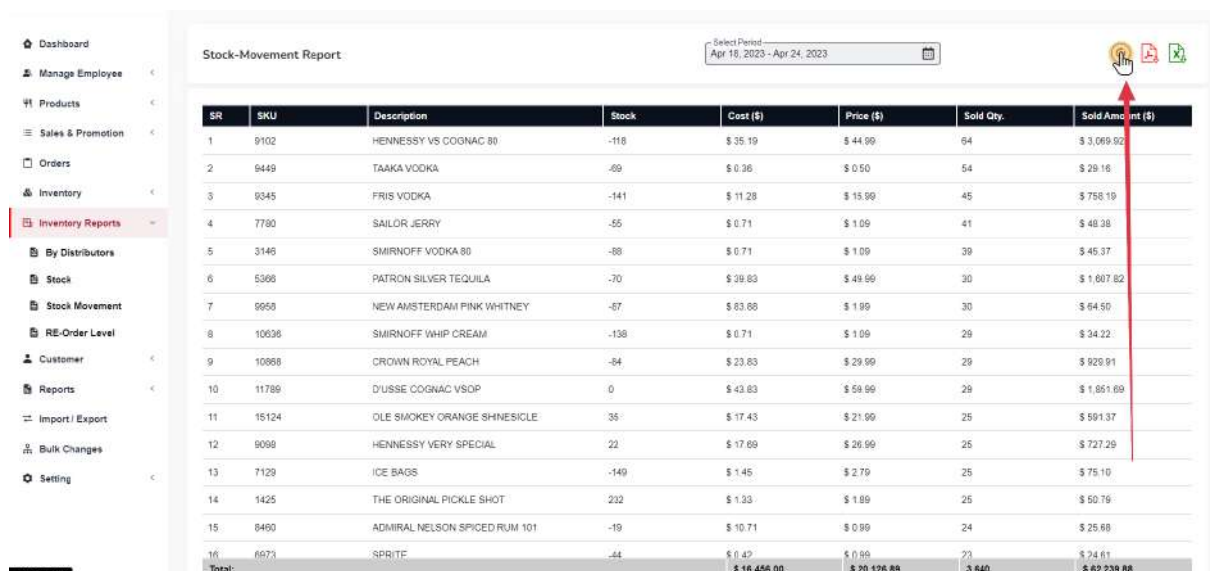


The screenshot shows the 'Stock-Movement Report' interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports (selected), By Distributors, Stock, Stock Movement, RE-Order Level, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area displays a table of stock movements with columns: SR, SKU, Description, Stock, Cost (\$), Price (\$), Sold Qty., and Sold Amount (\$). The table lists 16 items, including Hennessy VS Cognac 80, Taaka Vodka, Fris Vodka, Saylor Jerry, Smirnoff Vodka 80, Patron Silver Tequila, New Amsterdam Pink Whitney, Smirnoff Whip Cream, Crown Royal Peach, Dusse Cognac VSOP, Ole Smokey Orange Shinesicle, Hennessy Very Special, Ice Bags, The Original Pickle Shot, Admiral Nelson Spiced Rum 101, and Sprite. A 'Select Period' dropdown is set to 'Apr 18, 2023 - Apr 24, 2023'. A red arrow points to the 'select period' button in the top right corner of the report area.

SR	SKU	Description	Stock	Cost (\$)	Price (\$)	Sold Qty.	Sold Amount (\$)
1	9102	HENNESSY VS COGNAC 80	-118	\$ 35.19	\$ 44.99	64	\$ 3,069.92
2	9449	TAAKA VODKA	-69	\$ 0.36	\$ 0.50	54	\$ 29.16
3	9345	FRIS VODKA	-141	\$ 11.28	\$ 15.99	45	\$ 758.19
4	7780	SAILOR JERRY	-55	\$ 0.71	\$ 1.09	41	\$ 48.38
5	3146	SMIRNOFF VODKA 80	-88	\$ 0.71	\$ 1.09	39	\$ 45.37
6	5366	PATRON SILVER TEQUILA	-70	\$ 39.83	\$ 49.99	30	\$ 1,607.82
7	9958	NEW AMSTERDAM PINK WHITNEY	-57	\$ 83.88	\$ 1.99	30	\$ 64.50
8	10636	SMIRNOFF WHIP CREAM	-138	\$ 0.71	\$ 1.09	29	\$ 34.22
9	10868	CROWN ROYAL PEACH	-84	\$ 23.83	\$ 29.99	29	\$ 929.91
10	11789	D'USSE COGNAC VSOP	0	\$ 43.83	\$ 58.99	29	\$ 1,851.69
11	15124	OLE SMOKEY ORANGE SHINESICLE	35	\$ 17.43	\$ 21.99	25	\$ 591.37
12	9098	HENNESSY VERY SPECIAL	22	\$ 17.69	\$ 26.99	25	\$ 727.29
13	7129	ICE BAGS	-149	\$ 1.45	\$ 2.79	25	\$ 75.10
14	1425	THE ORIGINAL PICKLE SHOT	232	\$ 1.33	\$ 1.89	25	\$ 50.79
15	8460	ADMIRAL NELSON SPICED RUM 101	-19	\$ 10.71	\$ 0.99	24	\$ 25.68
16	6973	SPRITE	-44	\$ 0.47	\$ 0.99	23	\$ 24.61
Total:				\$ 16,456.00	\$ 20,126.89	3,640	\$ 62,239.88

8.3.2 Back Office - Stock Movement Reports Refresh

To refresh your stock movement report, click the **refresh** button



This screenshot is identical to the one above, showing the 'Stock-Movement Report' interface. A red arrow points to the 'refresh' button (a circular arrow icon) located in the top right corner of the report area, next to the 'select period' dropdown and export icons.

8.3.3 Back Office - Stock Movement Reports Export PDF

To export your stock movement report as a .pdf, click on the **.PDF** button

The screenshot shows the 'Stock-Movement Report' interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports (selected), By Distributors, Stock, Stock Movement, RE-Order Level, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area displays a table of stock movements for the period 'Apr 18, 2023 - Apr 24, 2023'. The table has columns: SR, SKU, Description, Stock, Cost (\$), Price (\$), Sold Qty., and Sold Amount (\$). A red arrow points to the PDF export button (represented by a document icon) in the top right corner of the report area.

SR	SKU	Description	Stock	Cost (\$)	Price (\$)	Sold Qty.	Sold Amount (\$)
1	9102	HENNESSY VS COGNAC 80	-118	\$ 35.19	\$ 44.99	64	\$ 3,069.92
2	9449	TAAKA VODKA	-69	\$ 0.36	\$ 0.50	54	\$ 29.16
3	9345	FRIS VODKA	-141	\$ 11.28	\$ 15.99	45	\$ 758.19
4	7780	SAILOR JERRY	-55	\$ 0.71	\$ 1.09	41	\$ 48.38
5	3146	SMIRNOFF VODKA 80	-88	\$ 0.71	\$ 1.09	39	\$ 45.37
6	5366	PATRON SILVER TEQUILA	-70	\$ 39.83	\$ 49.99	30	\$ 1,607.82
7	9958	NEW AMSTERDAM PINK WHITNEY	-57	\$ 83.88	\$ 1.99	30	\$ 64.50
8	10636	SMIRNOFF WHIP CREAM	-138	\$ 0.71	\$ 1.09	29	\$ 34.22
9	10868	CROWN ROYAL PEACH	-84	\$ 23.83	\$ 29.99	29	\$ 929.91
10	11789	D'USSE COGNAC VSOP	0	\$ 43.83	\$ 58.99	29	\$ 1,851.69
11	15124	OLE SMOKEY ORANGE SHINESICLE	35	\$ 17.43	\$ 21.99	25	\$ 591.37
12	9098	HENNESSY VERY SPECIAL	22	\$ 17.69	\$ 26.99	25	\$ 727.29
13	7129	ICE BAGS	-149	\$ 1.45	\$ 2.79	25	\$ 75.10
14	1425	THE ORIGINAL PICKLE SHOT	232	\$ 1.33	\$ 1.89	25	\$ 50.79
15	8460	ADMIRAL NELSON SPICED RUM 101	-19	\$ 10.71	\$ 0.99	24	\$ 25.68
16	6973	SPRITE	-44	\$ 0.47	\$ 0.99	23	\$ 24.61
Total:				\$ 16,456.00	\$ 20,126.89	3,640	\$ 62,239.88

8.3.4 Back Office - Stock Movement Reports Export Excel

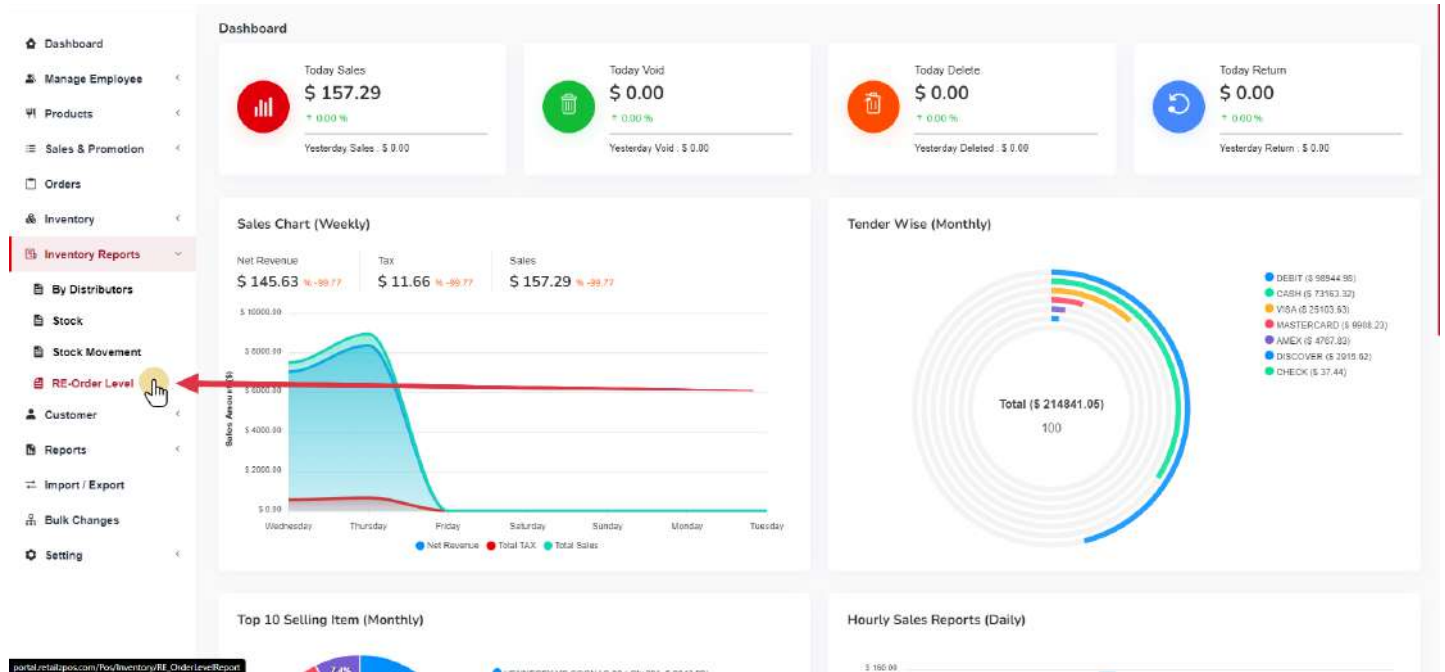
To export your stock movement report as an .xls file, click the **Excel** button

The screenshot shows the 'Stock-Movement Report' interface, identical to the one above. A red arrow points to the Excel export button (represented by a document icon with a green 'X') in the top right corner of the report area.

SR	SKU	Description	Stock	Cost (\$)	Price (\$)	Sold Qty.	Sold Amount (\$)
1	9102	HENNESSY VS COGNAC 80	-118	\$ 35.19	\$ 44.99	64	\$ 3,069.92
2	9449	TAAKA VODKA	-69	\$ 0.36	\$ 0.50	54	\$ 29.16
3	9345	FRIS VODKA	-141	\$ 11.28	\$ 15.99	45	\$ 758.19
4	7780	SAILOR JERRY	-55	\$ 0.71	\$ 1.09	41	\$ 48.38
5	3146	SMIRNOFF VODKA 80	-88	\$ 0.71	\$ 1.09	39	\$ 45.37
6	5366	PATRON SILVER TEQUILA	-70	\$ 39.83	\$ 49.99	30	\$ 1,607.82
7	9958	NEW AMSTERDAM PINK WHITNEY	-57	\$ 83.88	\$ 1.99	30	\$ 64.50
8	10636	SMIRNOFF WHIP CREAM	-138	\$ 0.71	\$ 1.09	29	\$ 34.22
9	10868	CROWN ROYAL PEACH	-84	\$ 23.83	\$ 29.99	29	\$ 929.91
10	11789	D'USSE COGNAC VSOP	0	\$ 43.83	\$ 58.99	29	\$ 1,851.69
11	15124	OLE SMOKEY ORANGE SHINESICLE	35	\$ 17.43	\$ 21.99	25	\$ 591.37
12	9098	HENNESSY VERY SPECIAL	22	\$ 17.69	\$ 26.99	25	\$ 727.29
13	7129	ICE BAGS	-149	\$ 1.45	\$ 2.79	25	\$ 75.10
14	1425	THE ORIGINAL PICKLE SHOT	232	\$ 1.33	\$ 1.89	25	\$ 50.79
15	8460	ADMIRAL NELSON SPICED RUM 101	-19	\$ 10.71	\$ 0.99	24	\$ 25.68
16	6973	SPRITE	-44	\$ 0.47	\$ 0.99	23	\$ 24.61
Total:				\$ 16,456.00	\$ 20,126.89	3,640	\$ 62,239.88

8.4 Back Office - Inventory Report Re-Order Level

To view your re-order level report, click **RE-Order Level** under your inventory reports



8.4.1 Back Office - RE-Order Level Report Date Range

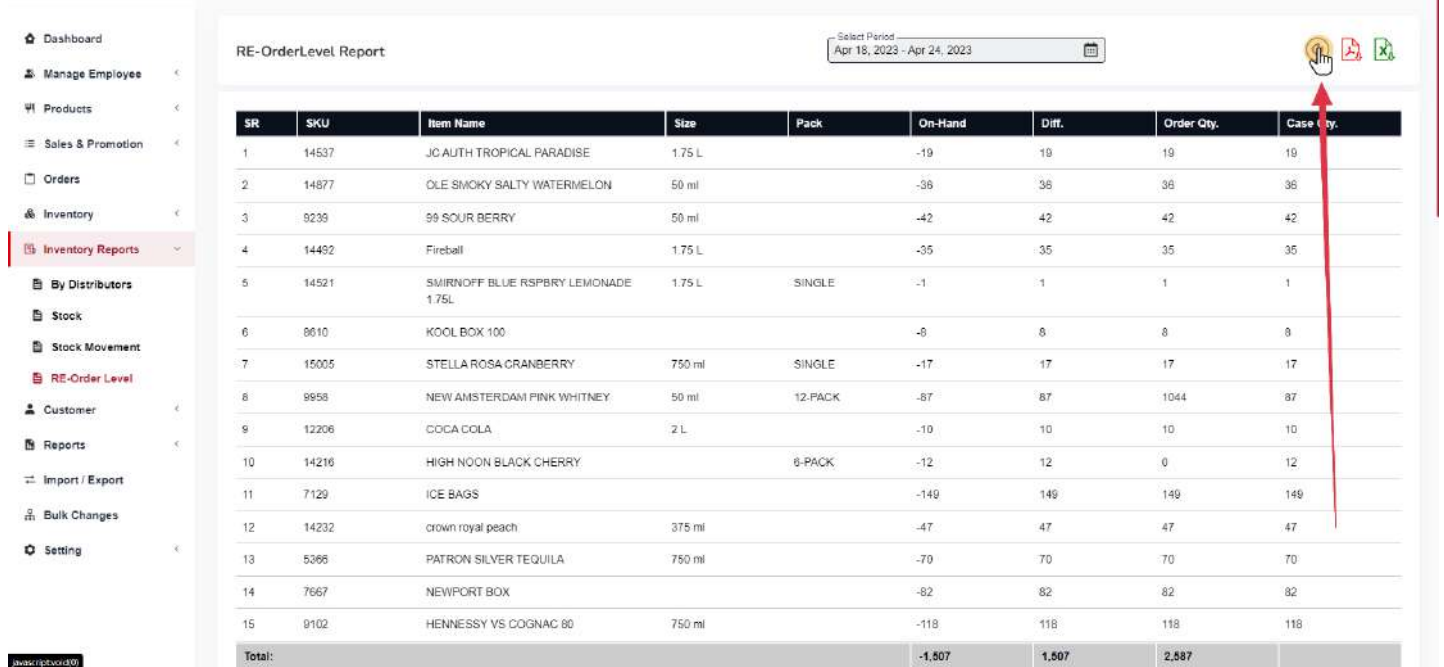
To filter your re-order level report date range, click on **select period**

The screenshot shows the RE-OrderLevel Report table. A date range filter is applied, showing data for April 18, 2023, to April 24, 2023. A red arrow points to the 'select period' button in the top right corner of the table.

SR	SKU	Item Name	Size	Pack	On-Hand	Diff.	Order Qty.	Case Qty.
1	14537	JC AUTH TROPICAL PARADISE	1.75 L		-19	19	19	19
2	14877	OLE SMOKY SALTY WATERMELON	50 ml		-36	36	36	36
3	9239	99 SOUR BERRY	50 ml		-42	42	42	42
4	14492	Fireball	1.75 L		-35	35	35	35
5	14521	SMIRNOFF BLUE RSPBRY LEMONADE 1.75L	1.75 L	SINGLE	-1	1	1	1
6	8610	KDOL BOX 100			-8	8	8	8
7	15005	STELLA ROSA CRANBERRY	750 ml	SINGLE	-17	17	17	17
8	9968	NEW AMSTERDAM PINK WHITNEY	50 ml	12-PACK	-87	87	1044	87
9	12206	COCA COLA	2 L		-10	10	10	10
10	14216	HIGH NOON BLACK CHERRY		8-PACK	-12	12	0	12
11	7129	ICE BAGS			-149	149	149	149
12	14232	crown royal peach	375 ml		-47	47	47	47
13	5386	PATRON SILVER TEQUILA	750 ml		-70	70	70	70
14	7667	NEWPORT BOX			-82	82	82	82
15	8102	HENNESSY VS COGNAC 80	750 ml		-118	118	118	118
Total:					-1,807	1,807	2,887	

8.4.2 Back Office - RE-Order Level Report Refresh

To refresh your re-order level report, click the **refresh** button

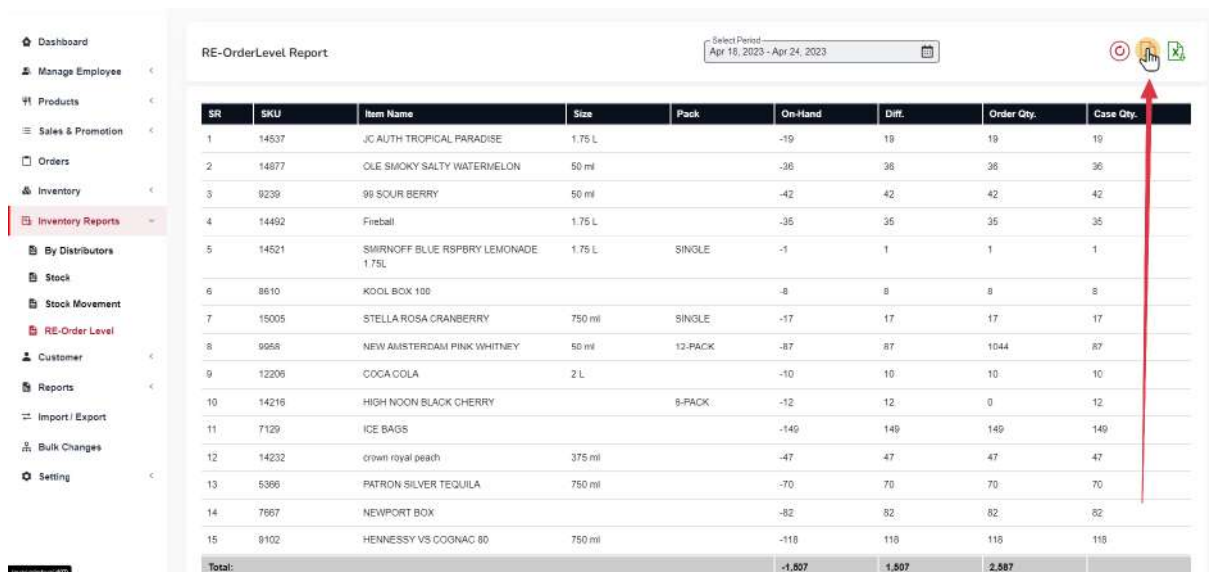


The screenshot shows the 'RE-OrderLevel Report' interface. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports (selected), By Distributors, Stock, Stock Movement, RE-Order Level, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area displays a table with columns: SR, SKU, Item Name, Size, Pack, On-Hand, Diff., Order Qty., and Case Qty. The table contains 15 rows of product data and a 'Total:' row at the bottom. In the top right corner of the report area, there are three icons: a refresh icon (circular arrow), a PDF icon, and an Excel icon. A red arrow points to the refresh icon.

SR	SKU	Item Name	Size	Pack	On-Hand	Diff.	Order Qty.	Case Qty.
1	14537	JC AUTH TROPICAL PARADISE	1.75 L		-19	19	19	19
2	14877	OLE SMOKY SALTY WATERMELON	50 ml		-36	36	36	36
3	9239	99 SOUR BERRY	50 ml		-42	42	42	42
4	14492	Fireball	1.75 L		-35	35	35	35
5	14521	SMIRNOFF BLUE RSPBRY LEMONADE 1.75L	1.75 L	SINGLE	-1	1	1	1
6	8610	KOOL BOX 100			-8	8	8	8
7	15005	STELLA ROSA CRANBERRY	750 ml	SINGLE	-17	17	17	17
8	9958	NEW AMSTERDAM PINK WHITNEY	50 ml	12-PACK	-87	87	1044	87
9	12206	COCA COLA	2 L		-10	10	10	10
10	14216	HIGH NOON BLACK CHERRY		6-PACK	-12	12	0	12
11	7129	ICE BAGS			-149	149	149	149
12	14232	crown royal peach	375 ml		-47	47	47	47
13	5366	PATRON SILVER TEQUILA	750 ml		-70	70	70	70
14	7667	NEWPORT BOX			-82	82	82	82
15	9102	HENNESSY VS COGNAC 80	750 ml		-118	118	118	118
Total:					-1,507	1,507	2,587	

8.4.3 Back Office - RE-Order Level Report Export PDF

To export your re-order level report as a .pdf, click on the **.PDF** button



This screenshot is identical to the one in section 8.4.2, showing the 'RE-OrderLevel Report' interface. In this instance, a red arrow points to the PDF icon (a document with a red 'X') in the top right corner of the report area, indicating the button used to export the report as a PDF.

8.4.4 Back Office - RE-Order Level Report Export Excel

To export your re-order level report as an .xls file, click the **Excel** button

The screenshot displays the 'RE-OrderLevel Report' interface. On the left is a sidebar menu with options like Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports (selected), By Distributors, Stock, Stock Movement, RE-Order Level, Customer, Reports, Import / Export, Bulk Changes, and Setting. The main area shows a table with columns: SR, SKU, Item Name, Size, Pack, On-Hand, Diff., Order Qty., and Case Qty. The table lists 15 items, including JC AUTH TROPICAL PARADISE, OLE SMOKY SALTY WATERMELON, 99 SOUR BERRY, Fireball, SMIRNOFF BLUE RSPBRY LEMONADE, KOOL BOX 100, STELLA ROSA CRANBERRY, NEW AMSTERDAM PINK WHITNEY, COCA COLA, HIGH NOON BLACK CHERRY, ICE BAGS, crown royal peach, PATRON SILVER TEQUILA, NEWPORT BOX, and HENNESSY VS COGNAC 80. At the bottom right of the table, there are three icons: a circular arrow, a document, and a hand cursor. A red arrow points to the hand cursor icon, which is the 'Excel' button for exporting the report.

SR	SKU	Item Name	Size	Pack	On-Hand	Diff.	Order Qty.	Case Qty.
1	14537	JC AUTH TROPICAL PARADISE	1.75 L		-19	19	19	19
2	14877	OLE SMOKY SALTY WATERMELON	50 ml		-38	38	38	38
3	9239	99 SOUR BERRY	50 ml		-42	42	42	42
4	14492	Fireball	1.75 L		-35	35	35	35
5	14521	SMIRNOFF BLUE RSPBRY LEMONADE 1.75L	1.75 L	SINGLE	-1	1	1	1
6	8610	KOOL BOX 100			-8	8	8	8
7	15005	STELLA ROSA CRANBERRY	750 ml	SINGLE	-17	17	17	17
8	9958	NEW AMSTERDAM PINK WHITNEY	50 ml	12-PACK	-87	87	1044	87
9	12206	COCA COLA	2 L		-10	10	10	10
10	14216	HIGH NOON BLACK CHERRY		6-PACK	-12	12	0	12
11	7129	ICE BAGS			-149	149	149	149
12	14232	crown royal peach	375 ml		-47	47	47	47
13	5366	PATRON SILVER TEQUILA	750 ml		-70	70	70	70
14	7667	NEWPORT BOX			-82	82	82	82
15	9102	HENNESSY VS COGNAC 80	750 ml		-118	118	118	118
Total:					-1,507	1,507	2,587	

9 Back Office - Customer

From the RetailzPOS **Back Office**, click **Customers** to access your stores customer management

The screenshot shows the 'Dashboard' in the RetailzPOS Back Office. The left sidebar menu is the same as in the previous screenshot, with 'Customer' highlighted and a hand cursor icon pointing to it. The main dashboard area contains several widgets:

- Today Sales:** \$ 0.00 (with a green up arrow and 0.00% change).
- Today Void:** \$ 0.00 (with a green up arrow and 0.00% change).
- Today Delete:** \$ 0.00 (with a green up arrow and 0.00% change).
- Today Return:** \$ 0.00 (with a green up arrow and 0.00% change).
- Sales Chart (Weekly):** A line chart showing Net Revenue, Tax, and Sales over a week. The Y-axis is labeled 'Sales Amount (\$)' and ranges from \$ 0.00 to \$ 4.00. The X-axis shows days from Wednesday to Tuesday. A red arrow points to the 'Customer' menu item in the sidebar.
- Tender Wise (Monthly):** A section for tracking sales by payment method.
- Top 10 Selling Item (Monthly):** A section for tracking top-selling products.
- Hourly Sales Reports (Daily):** A section for daily sales reports.

9.1 Back Office - Customer List

To view your store customer list, select **Customer**

Customer

Add Active In-Active Total: 1 Page Size: 50 Active In-Active

Customer Name	Phone No.	Card No.	Account Credit Limit	Balance Due	Remaining Balance
<input type="checkbox"/> John Smith	(987) 654-3210	-	5000.00	\$ 0.00	\$ 340.30

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9.1.1 Back Office - Add Customer

To add a new customer, click **Add**

Customer

Add Active In-Active Total: 1 Page Size: 50 Active In-Active

Customer Name	Phone No.	Card No.	Account Credit Limit	Balance Due	Remaining Balance
<input type="checkbox"/> John Smith	(987) 654-3210	-	5000.00	\$ 0.00	\$ 340.30

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9.1.2 Back Office - Customer First Name

When adding a new customer, provide a **First Name**

EDIT CUSTOMER

Personal Details

License Id: 0 Driver's License: Email: Scan License

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd

Address 2: Zip Code: 99999 City: Atlanta

State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit: \$ 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.3 Back Office - Customer Last Name

When adding a new customer, provide a **Last Name**

EDIT CUSTOMER

Personal Details

License Id: 0 Driver's License: Email: Scan License

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd

Address 2: Zip Code: 99999 City: Atlanta

State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit: \$ 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.4 Back Office - Customer Address

When adding a new customer, provide a **Address**

EDIT CUSTOMER

Personal Details

License Id: 0 Driver's License: Email: [Scan License]

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd City: Atlanta

Address 2: Zip Code: 99999 State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit \$: 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.5 Back Office - Customer ZIP Code

When adding a new customer, provide a **Zip Code**

EDIT CUSTOMER

Personal Details

License Id: 0 Driver's License: Email: [Scan License]

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd City: Atlanta

Address 2: Zip Code: 99999 State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit \$: 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.6 Back Office - Customer City

When adding a new customer, provide a **City**

EDIT CUSTOMER

Personal Details

License ID: 0 Driver's License: Email: Scan License

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd

Address 2: Zip Code: 99999 City: Atlanta

State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit: \$ 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.7 Back Office - Customer State

When adding a new customer, provide a **State**

EDIT CUSTOMER

Personal Details

License ID: 0 Driver's License: Email: Scan License

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd

Address 2: Zip Code: 99999 City: Atlanta

State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit: \$ 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save


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9.1.8 Back Office - Customer Country

When adding a new customer, provide a **Country**

EDIT CUSTOMER

Personal Details

License Id: 0 Driver's License: Email:  **Scan License**

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd

Address 2: Zip Code: 99999 City: Atlanta

State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit: \$ 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save


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9.1.9 Back Office - Custom Phone Number

When adding a new customer, provide a **Phone Number**

EDIT CUSTOMER

Personal Details

License Id: 0 Driver's License: Email:  **Scan License**

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd

Address 2: Zip Code: 99999 City: Atlanta

State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit: \$ 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.10 Back Office - Customer Account Credit Limit

When adding a new customer you can provide an in store **Credit Limit** that can be used to make purchases

EDIT CUSTOMER

Personal Details

License Id: 0, Driver's License, Email, First Name: John, Last Name: Smith, Address 1: 123 Atlanta Blvd, Address 2, Zip Code: 99999, City: Atlanta, State: GA, Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210, Card Number, Account Credit Limit \$: 5000, Remaining Limit: 5000, Opening Balance: 340.3, Company Name, ☒ CORPORATE CUSTOMER, ☐ ALLOW ACCEPTING CHECK, ☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.11 Back Office - Corporate Customer

To make a customer a corporate customer, select **CORPORATE CUSTOMER**

EDIT CUSTOMER

Personal Details

License Id: 0, Driver's License, Email, First Name: John, Last Name: Smith, Address 1: 123 Atlanta Blvd, Address 2, Zip Code: 99999, City: Atlanta, State: GA, Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210, Card Number, Account Credit Limit \$: 5000, Remaining Limit: 5000, Opening Balance: 340.3, Company Name, ☐ CORPORATE CUSTOMER, ☐ ALLOW ACCEPTING CHECK, ☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.12 Back Office - Customer Check Payment Permissions

To allow a customer to make purchases with check, select **ALLOW ACCEPTING CHECK**

EDIT CUSTOMER

Personal Details

License Id: 0 Driver's License: Email: Scan License

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd

Address 2: Zip Code: 99999 City: Atlanta

State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit \$: 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.13 Back Office - Tax Exempt Customer

To make a customer eligible for tax exemption, select **Tax Exempt**

EDIT CUSTOMER

Personal Details

License Id: 0 Driver's License: Email: Scan License

First Name: John Last Name: Smith Address 1: 123 Atlanta Blvd

Address 2: Zip Code: 99999 City: Atlanta

State: GA Select Country: United States

Customer Loyalty

Phone Number: (987) 654-3210 Card Number: Account Credit Limit \$: 5000 Remaining Limit: 5000

Opening Balance: 340.3 Company Name: ☐ CORPORATE CUSTOMER ☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.14 Back Office - Save Customer

To save customer information, click **Save**

Dashboard

Manage Employee

Products

Sales & Promotion

Orders

Inventory

Inventory Reports

Customer

Customer

Customer Group

Customer Settlement

Reports

Import / Export

Bulk Changes

Setting

EDIT CUSTOMER

Personal Details

License Id

0

Driver's License

Email

First Name *

John

Last Name *

Smith

Address 1 *

123 Atlanta Blvd

Address 2

Zip Code *

99999

City *

Atlanta

State *

GA

Select Country *

United States

Scan License

Customer Loyalty

Phone Number *

(587) 654-3210

Card Number

Account Credit Limit \$ *

5000

Remaining Limit

5000

Opening Balance

340.3

Company Name

☐ CORPORATE CUSTOMER

☐ ALLOW ACCEPTING CHECK

☐ Tax Exempt

Price Level

☒ Regular Price

Save

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9.1.15 Back Office - Deactivate Customer

To deactivate a customer, hover over the customer and click the blue slider

Customer

Add
Active
In-Active
Total: 1
Page Size 50
Active
In-Active

Customer Name	Phone No.	Card No.	Account Credit Limit	Balance Due	Remaining Balance
<input type="checkbox"/> John Smith	(987) 854-3210	-	5000.00	\$ 0.00	edit delete active inactive

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9.1.16 Back Office - Confirm Customer Deactivation

To confirm customer deactivation, click **YES**

The screenshot shows the 'Customer' management page. A table lists customer details. An alert dialog box is displayed in the center, asking 'Are you sure want to set the Customer as DeActive?'. A red arrow points to the 'YES' button in the alert.

Customer Name	Phone No.	Card No.	Account Credit Limit	Balance Due	Remaining Balance
John Smith	(987) 654-3210	-	5000.00	\$ 0.00	\$ 340.30

Alert:
Are you sure want to set the Customer as DeActive?

YES NO

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9.1.17 Back Office - Activate Customer

To activate a customer, hover over the customer and click the **grayed out slider**

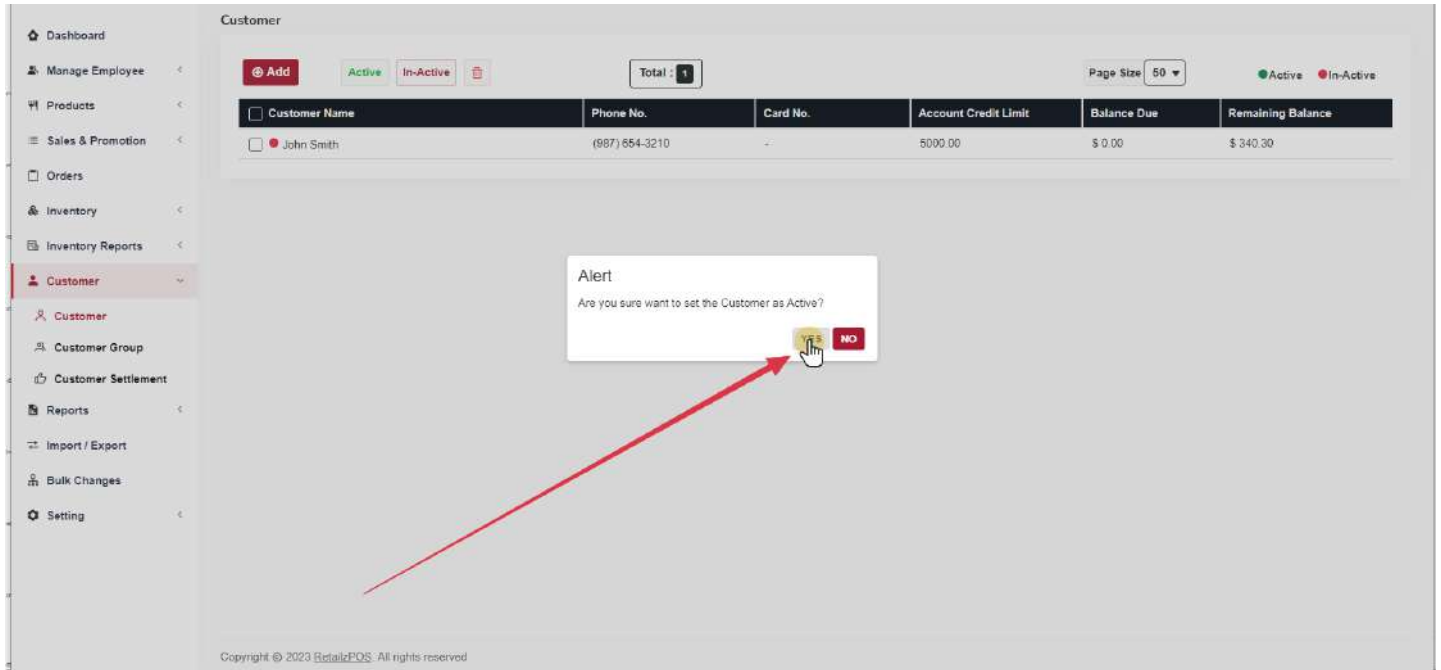
The screenshot shows the 'Customer' management page. A table lists customer details. A red arrow points to the 'Remaining Balance' column of the first customer, where a slider control is visible. The slider is currently grayed out, indicating it cannot be activated.

Customer Name	Phone No.	Card No.	Account Credit Limit	Balance Due	Remaining Balance
John Smith	(987) 654-3210	-	5000.00	\$ 0.00	

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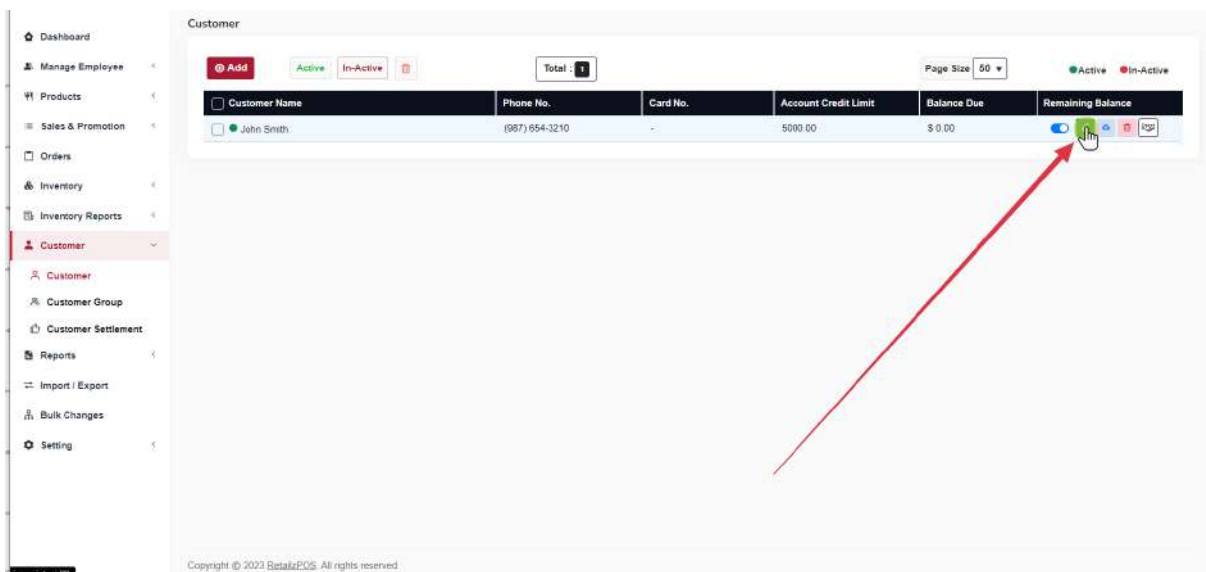
9.1.18 Back Office - Confirm Customer Activation

To confirm customer activation, click **YES**



9.1.19 Back Office - Edit Customer

To edit a customer, click the **green** edit button



9.1.20 Back Office - Upload Customer Documents

To upload customer documents, click on the **blue** upload button

The screenshot displays the 'Customer' management page. On the left is a sidebar menu with options like Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer (selected), Customer Group, Customer Settlement, Reports, Import / Export, Bulk Changes, and Setting. The main area shows a table of customers. At the top of the table, there are buttons for 'Add', 'Active', 'In-Active', and a trash icon, along with a 'Total: 1' indicator and a 'Page Size: 50' dropdown. The table has columns: Customer Name, Phone No., Card No., Account Credit Limit, Balance Due, and Remaining Balance. A single customer, John Smith, is listed. To the right of the table, there are status toggles (Active/In-Active) and a set of action buttons: a blue upload button, a green plus button, a red minus button, and a trash icon. A red arrow points from the bottom left towards the blue upload button.

Customer Name	Phone No.	Card No.	Account Credit Limit	Balance Due	Remaining Balance
John Smith	(987) 654-3210	-	5000.00	\$ 0.00	

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9.1.21 Back Office - Delete Customer

To delete a customer, click the **red** delete button

This screenshot is identical to the one above, showing the 'Customer' management page. It highlights the same interface elements: sidebar menu, table with one customer (John Smith), and action buttons. In this context, a red arrow points from the bottom left towards the red minus button (delete icon) located next to the blue upload button in the action column.

Customer Name	Phone No.	Card No.	Account Credit Limit	Balance Due	Remaining Balance
John Smith	(987) 654-3210	-	5000.00	\$ 0.00	

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9.1.22 Back Office - Customer Settlement

To make a customer payment settlement, click on the **settlement** button

The screenshot shows the 'Customer' management interface. The left sidebar has a 'Customer' menu item highlighted. The main content area shows a table with the following data:

Customer Name	Phone No.	Card No.	Account Credit Limit	Balance Due	Remaining Balance	
John Smith	(987) 654-3210	-	5000.00	\$ 0.00		<input type="checkbox"/> Active <input type="checkbox"/> In-Active <input type="checkbox"/> Settlement

A red arrow points to the 'settlement' button in the table's action column.

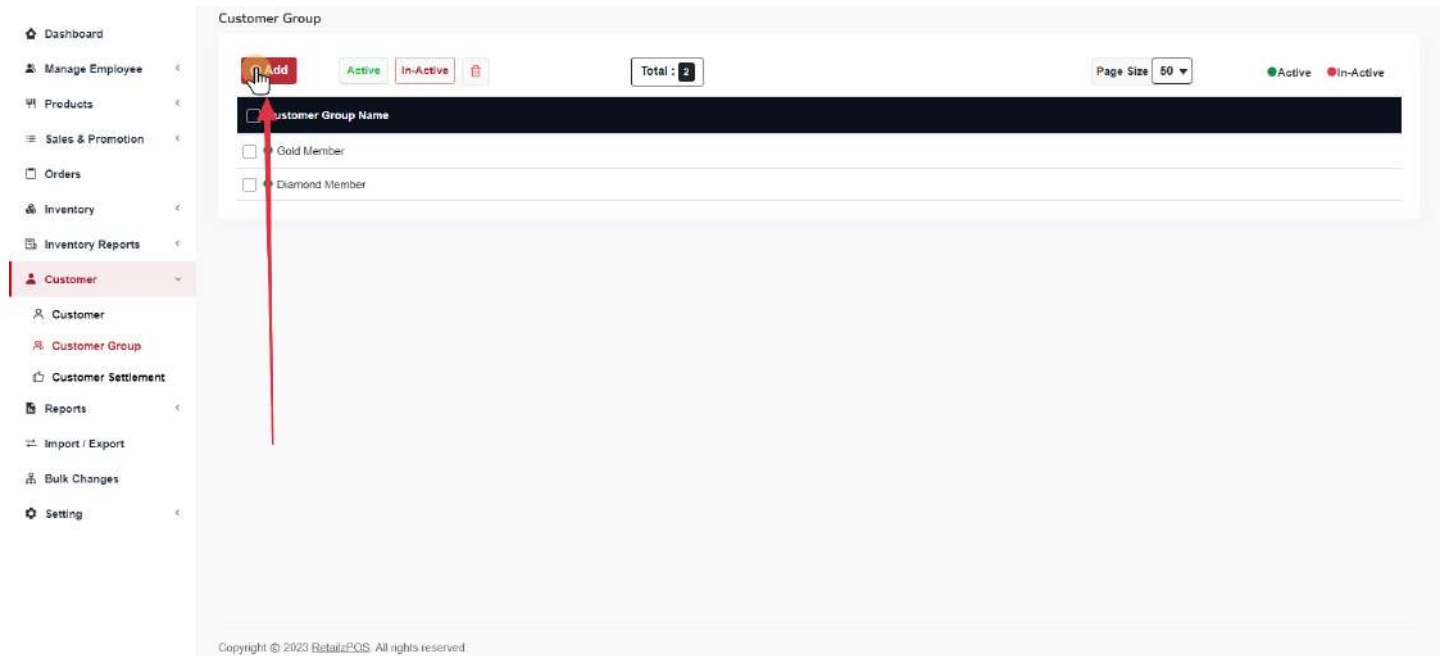
9.2 Back Office - Customer Group

From the RetailzPOS **Back Office**, click customers to access your stores **Customer Groups**

The screenshot shows the 'Customer Group' management interface. The left sidebar has a 'Customer' menu item highlighted. The main content area shows a form for adding a new customer group. A red arrow points to the 'Customer Group' menu item in the sidebar.

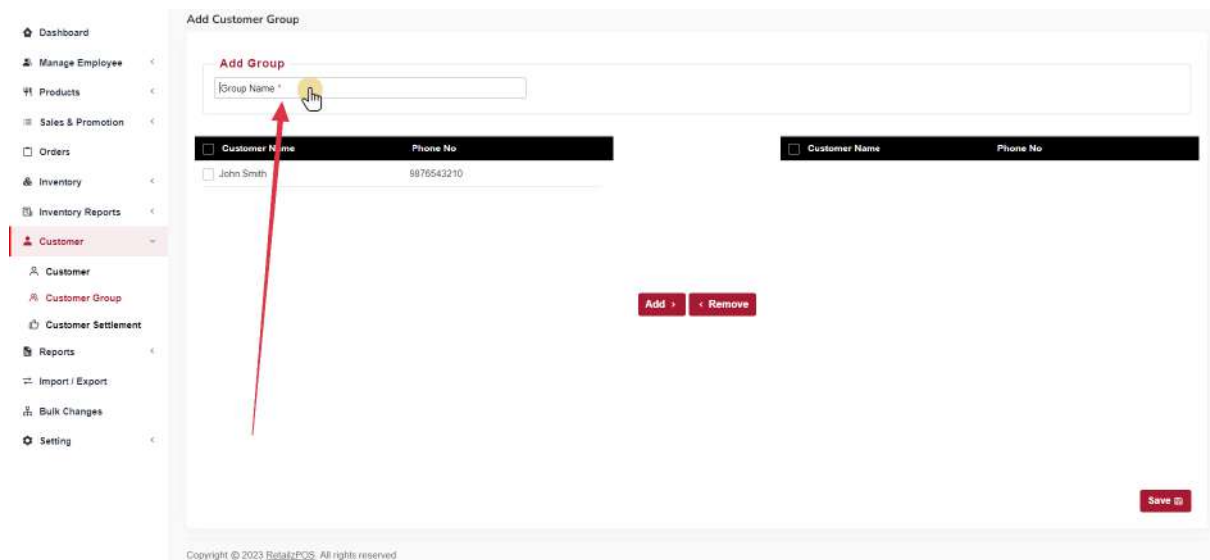
9.2.1 Back Office - Create New Customer Group

To create a new customer group, click **Add**



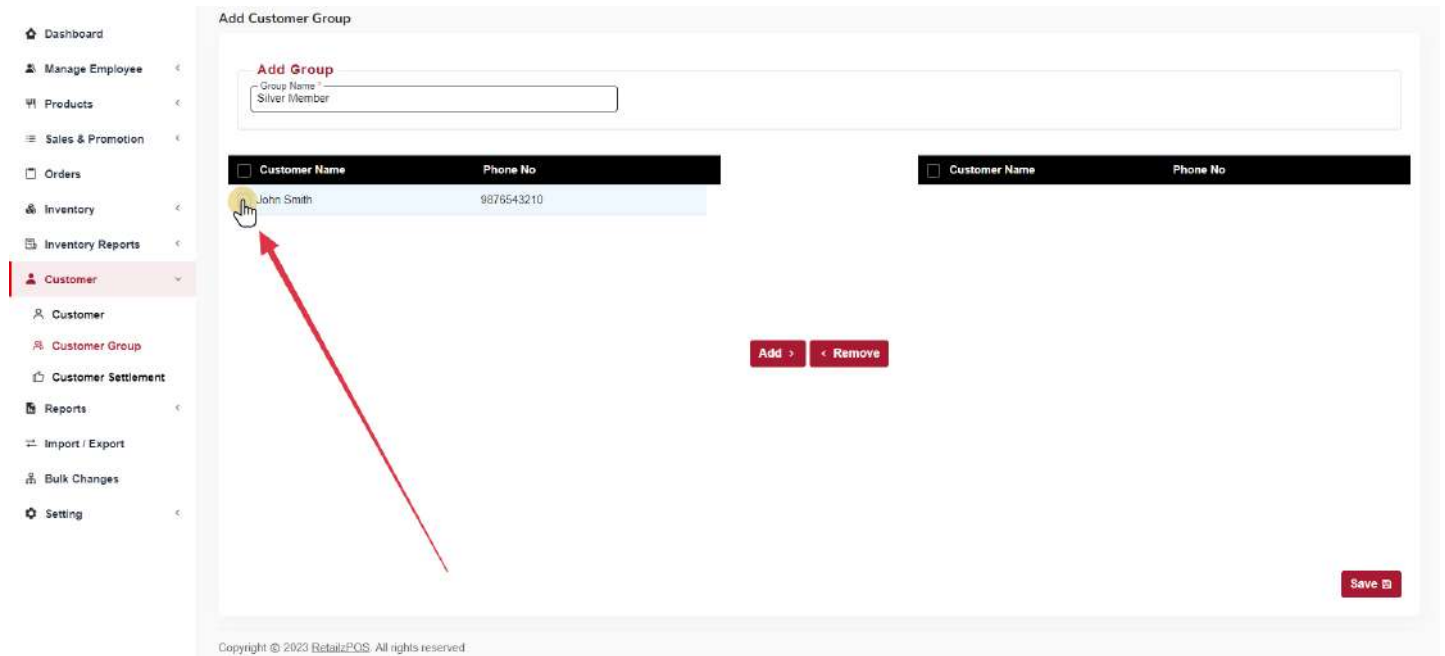
9.2.2 Back Office - Customer Group Name

When creating a new customer group, always provide a **Group Name**



9.2.3 Back Office - Select Customer To Add To Group

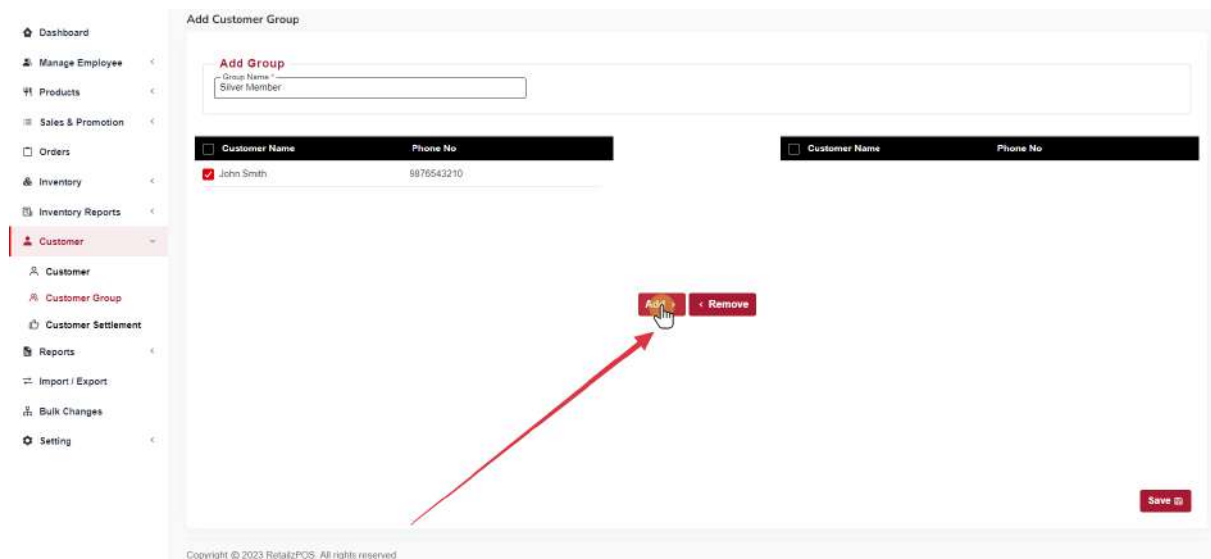
To select a customer, click the **box** next to the customer name



The screenshot displays the 'Add Customer Group' interface. On the left is a sidebar menu with options: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer (selected), Customer Group, Customer Settlement, Reports, Import / Export, Bulk Changes, and Setting. The main content area has a title 'Add Customer Group' and a form with a 'Group Name' field containing 'Silver Member'. Below this is a table with two columns: 'Customer Name' and 'Phone No'. The first row contains 'John Smith' and '9876543210'. A red arrow points to the selection box next to 'John Smith'. To the right of the table is another empty table with the same columns. At the bottom right of the main area are 'Add' and 'Remove' buttons. A 'Save' button is at the bottom right of the entire interface. A copyright notice 'Copyright © 2023 RetailzPOS. All rights reserved.' is at the bottom left.

9.2.4 Back Office - Add Customer To Group

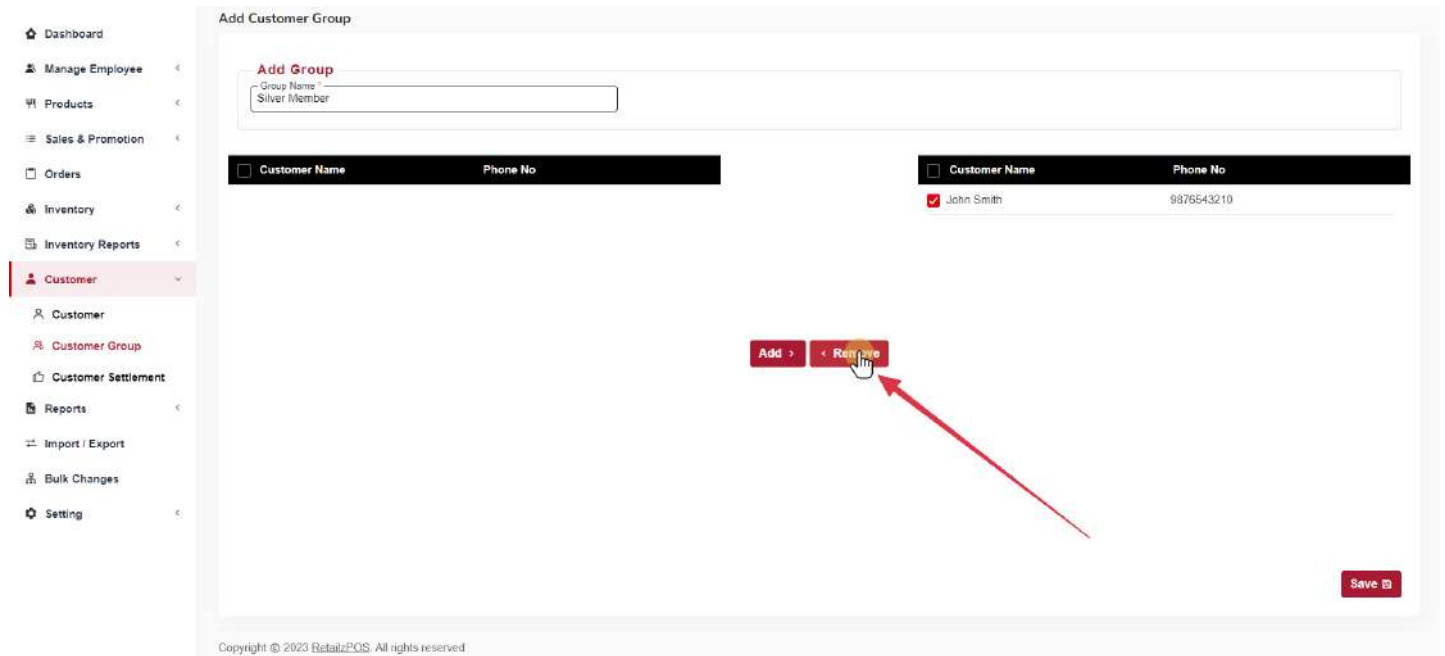
To add a customer to a customer group, click **Add**



This screenshot shows the same 'Add Customer Group' interface as the previous one, but with the 'Add' button highlighted by a red arrow. The 'Add' button is located at the bottom right of the table area, next to the 'Remove' button. The 'John Smith' customer is now selected in the table, indicated by a red checkmark in the selection box. The 'Save' button remains at the bottom right of the interface. The copyright notice 'Copyright © 2023 RetailzPOS. All rights reserved.' is visible at the bottom left.

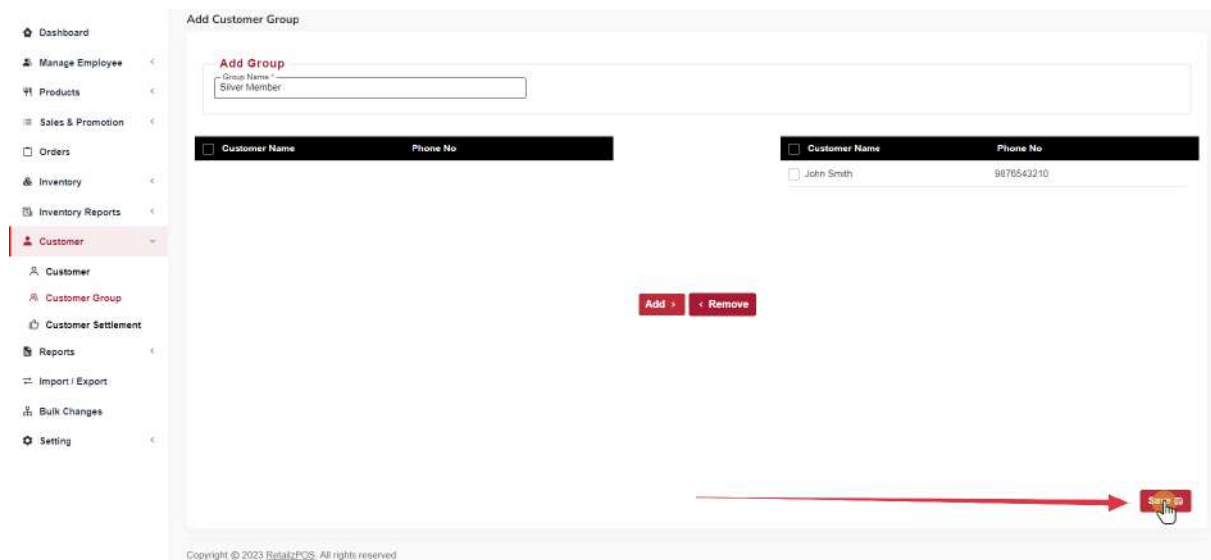
9.2.5 Back Office - Remove Customer From Group

To remove a customer from a customer group, select the customer and click **Remove**



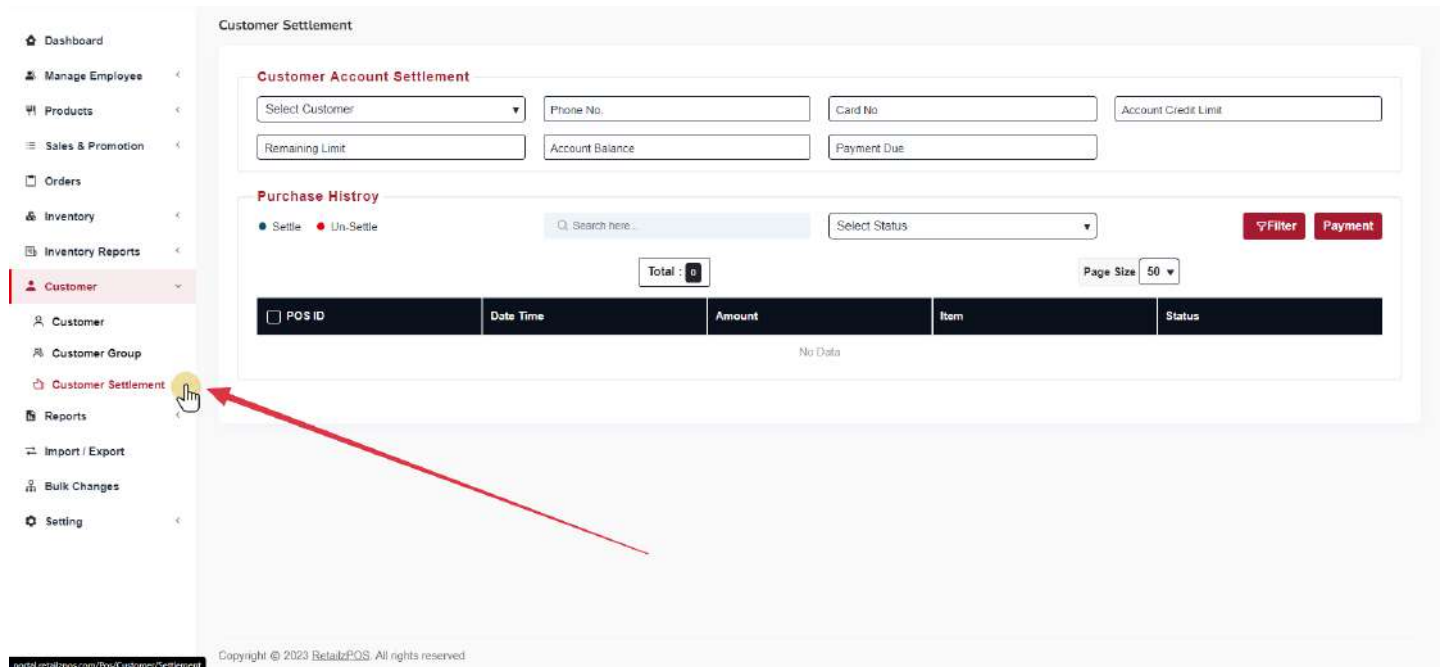
9.2.6 Back Office - Save Customer Group

To save a customer group, click **Save**



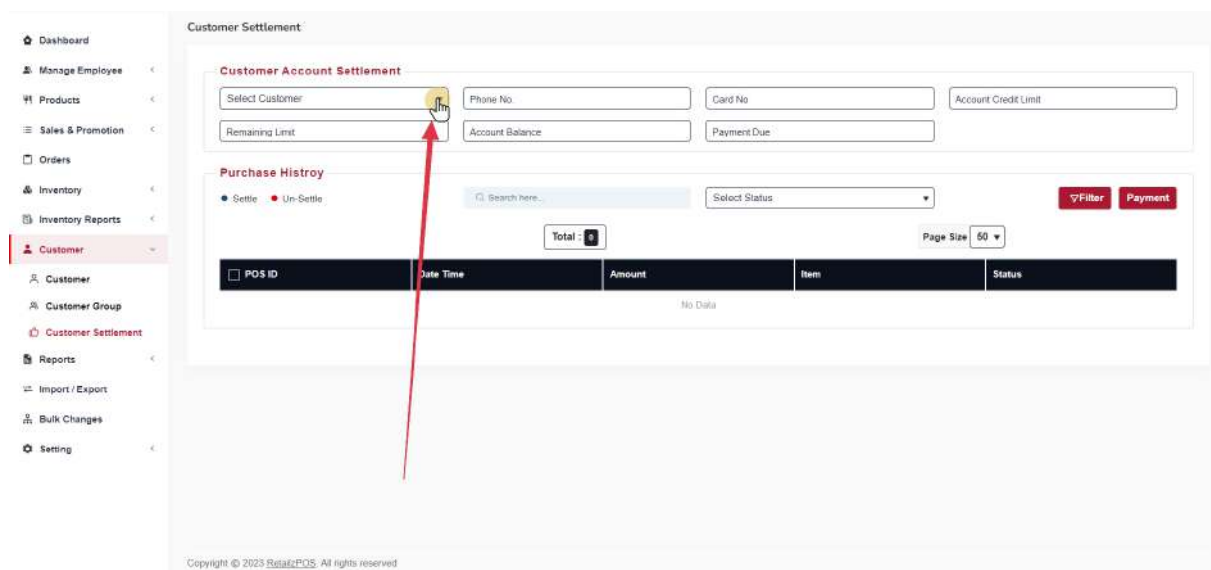
9.3 Back Office - Customer Settlement

From the RetailzPOS **Back Office**, click **Customer Settlement** to access your stores customer settlement's



9.3.1 Back Office - Customer Settlement Select Customer

When making a customer account settlement, begin with selecting the **Customer**



9.3.2 Back Office - Customer Settlement Select Status

When making a customer settlement, select the **Status**

The screenshot shows the 'Customer Settlement' interface. On the left is a sidebar menu with options like Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Customer Group, Customer Settlement, Reports, Import / Export, Bulk Changes, and Setting. The 'Customer Settlement' option is highlighted. The main content area is titled 'Customer Settlement' and contains two sections: 'Customer Account Settlement' and 'Purchase History'. The 'Customer Account Settlement' section has fields for 'Select Customer' (John Smith), 'Phone No' (987 954-3210), 'Card No', 'Account Credit Limit' (5000.00), 'Remaining Limit' (5000), 'Account Balance' (340.30), and 'Payment Due' (0.00). The 'Purchase History' section has a 'Settle' radio button selected, a search bar, a 'Select Status' dropdown menu, a 'Filter' button, and a 'Payment' button. A red arrow points to the 'Select Status' dropdown menu. Below the dropdown is a table with columns: POS ID, Date Time, Amount, Item, and Status. The table is currently empty, showing 'No Data'. A 'Page Size' dropdown is set to 50. At the bottom, there is a copyright notice: 'Copyright © 2023 RetailPOS. All rights reserved.'

9.3.3 Back Office - Customer Settlement Status Un-Settle

To select a customer invoice to settle, **check the box** under POS ID

The screenshot shows the 'Customer Settlement' interface with the 'Purchase History' section. The 'Settle' radio button is selected. The 'Select Status' dropdown menu is set to 'Settle'. A red arrow points to the 'Select Status' dropdown menu. Below the dropdown is a table with columns: POS ID, Date Time, Amount, Item, and Status. The table contains one row with the following data: POS ID (401-20230118094704633), Date Time (Jan 18, 2023 07:47 AM), Amount (\$ 340.3), Item (3), and Status (Settle). A red arrow points to the checkbox under the POS ID column. At the bottom, there is a copyright notice: 'Copyright © 2023 RetailPOS. All rights reserved.'

9.3.4 Back Office - Customer Settlement Status Settle

After selecting a customer invoice to settle, click on **Pay & Settle** to make a payment

Customer Settlement

Customer Account Settlement

Select Customer: John Smith | Phone No: (987) 954-3210 | Card No: | Account Credit Limit: \$000.00

Remaining Limit: 5000 | Account Balance: 340.30 | Payment Due: 0.00

Purchase History

● Settle ● Un-Settle | Search here: | Select Status: Settle | Filter | \$ 0.00 | Pay & Settle

Total: 1 | Page Size: 50

POS ID	Date Time	Amount	Item	Status
40I-20230118094704633	Jan 18, 2023 07:47 AM	\$ 340.3	3	Settle

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10 Back Office - Reports

From the RetailzPOS **Back Office**, click **Reports** to access your store reporting

Dashboard

Today Sales: \$96.30 | Today Void: \$132.66 | Today Delete: \$181.58 | Today Return: \$0.00

Yesterday Sales: \$0.00 | Yesterday Void: \$0.00 | Yesterday Deleted: \$0.00 | Yesterday Return: \$0.00

Sales Chart (Weekly)

Net Revenue: \$90.00 | Tax: \$6.30 | Sales: \$96.30

Tender Wise (Monthly)

Total (\$15795.28)

Top 10 Selling Item (Monthly)

Hourly Sales Reports (Daily)

10.1 Back Office - Sales Summary Report

To view your live sales summary report, click [Sales Summary Report](#)

Select Date Range: Apr 26, 2023 12:00 AM - Apr 26, 2023 11:59 PM

Select Batch: Select Employee: Select Register:

Sales Summary Report

SALES SUMMARY		SHIFT DETAILS		STATISTICS SUMMARY		SALES BY DEPARTMENT	
TAXABLE	\$ 90.00	SHIFT NO.	0	TITLE	COUNT	AMOUNT	DEPARTMENT
NON TAXABLE	\$ 0.00	ROLE	-	TOTAL DISCOUNT	0	\$ 0.00	XYZ
NON REVENUE	\$ 0.00	EMPLOYEE NAME	-	TOTAL VOID	4	\$ 132.96	9
NET REVENUE	\$ 90.00	SHIFT OPENING TIME	-	TOTAL DELETE	17	\$ 162.96	SUB TOTAL
TOTAL TAX AMOUNT(+)	\$ 6.30	SHIFT CLOSE TIME	-	RETURN TRANSACTIONS	0	\$ 0.00	TOTAL TAX AMOUNT(+)
TOTAL CARD SURCHARGE(+)	\$ 0.00			TOTAL TRANSACTIONS	3	\$ 96.30	TOTAL CARD SURCHARGE(+)
TOTAL ITEM SURCHARGE(+)	\$ 0.00			CASH-BACK AMOUNT	0	\$ 0.00	TOTAL ITEM SURCHARGE(+)
TOTAL DISCOUNT(-)	\$ 0.00			CARD SURCHARGE	0	\$ 0.00	TOTAL DISCOUNT(-)
GROSS RECEIVED	\$ 96.30			ITEM SURCHARGE	0	\$ 0.00	GRAND TOTAL
				TOTAL NO SALE	0	\$ 0.00	\$ 96.30

TAX SUMMARY		
TAX NAME (%)	SALES	TAX AMOUNT
TAX1 (7 %)	\$ 90.00	\$ 6.30
TOTAL TAX AMOUNT		\$ 6.30

LOTTERY SUMMARY	
LOTTO ONLINE	\$ 0.00
LOTTO SCRATCH (+)	\$ 0.00
TOTAL ONLINE/SCRATCH	\$ 0.00
TOTAL RAYOUT (-)	\$ 0.00
TOTAL NON REVENUE AMOUNT	\$ 0.00

TENDER PAYMENT SUMMARY	
CASH (+)	\$ 96.30
EBT (+)	\$ 0.00
EBT CASH(+)	\$ 0.00
CREDIT CARD (+)	\$ 0.00
DEBIT CARD (+)	\$ 0.00
CHECK (+)	\$ 0.00
HOUSE ACCOUNT (+)	\$ 0.00
GRAND TOTAL	\$ 96.30
TOTAL CASH	\$ 96.30
TOTAL CARD	\$ 0.00
TOTAL EBT	\$ 0.00

CREDIT CARD BREAKDOWN	
CARD NAME	AMOUNT
-	\$ 0.00

TOTAL NO SALE		
S.R. NO	ROLE	DATE TIME
0	-	-

CASH DEPOSIT	
OPENING BALANCE (+)	\$ 500.00
CASH COLLECTED (+)	\$ 96.30
CASH RAIDIN (+)	\$ 0.00
CASH RAIDOUT (-)	\$ 0.00
CASH DROPPED (-)	\$ 0.00
CASH IN HAND	\$ 696.30

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demo@beta.com/Pdf/Reports/SalesSummaryReport

10.2 Back Office - Department Sales Summary Report

To view your department sales summary report, click [Department Sales Summary Report](#)

Select Period: Apr 26, 2023 - Apr 26, 2023

Department Sales Summary Report

No	Department Name	Subtotal	Total Discount	Total Surcharge	Net Sale	Total Tax	Grand Total
1	xyz	\$ 90.00	\$ 0.00	\$ 0.00	\$ 90.00	\$ 6.30	\$ 96.30
	TOTAL	\$ 90.00	\$ 0.00	\$ 0.00	\$ 90.00	\$ 6.30	\$ 96.30

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demo@beta.com/Pdf/Reports/DepartmentSalesSummaryReport

10.3 Back Office - Tax Summary Report

To view your tax summary report, click **Tax Summary Report**

Tax Summary Report

Title	Amount	Tax Title	Sale Amount	Tax	Total Amount
Taxable	\$ 0.00	TAX1	\$ 90.00	7.00 %	\$ 0.00
NonTaxable	\$ 0.00	TAX2	\$ 0.00	0.00 %	\$ 0.00
		TAX3	\$ 0.00	0.00 %	\$ 0.00
		TAX4	\$ 0.00	0.00 %	\$ 0.00
		TAX5	\$ 0.00	0.00 %	\$ 0.00
TOTAL	\$ 0.00	TOTAL			\$ 0.00

demo@etapcs.com/Pos/Reports/TaxSummaryReport

10.4 Back Office - Sales By Item Summary Report

To view your sales by item summary report, click **Sales By Item Summary Report**

Sales By Item Summary Report

No	SKU	UPC	ItemName	Sold Quantity	Stock On Hand	Sales Amount
1	12	54074191129	Test mp	9	-412	\$ 96.30
TOTAL				9	-412	\$ 96.30

demo@etapcs.com/Pos/Reports/SalesByItemSummaryReport

10.5 Back Office - Action Log Report

To view your action log report, click [Sales By Item Summary Report](#)

Select Period: Apr 26, 2023 - Apr 26, 2023 | Select Employee: | Select Action: |

Action Log Report								
Employee Name	Date Time	Shift Id	Action	Reason	Counts	Amount	Type	Counts
Ritesh Patel	Apr 26, 2023 11:02 AM	7	DELETE	Default Remark	-1	\$ 9.30	NoSale	0
Ritesh Patel	Apr 26, 2023 11:01 AM	7	DELETE	Default Remark	1	\$ 10.70	Delete	19
Ritesh Patel	Apr 26, 2023 11:00 AM	7	VOID	VOID	1	\$ 10.70	Void	4
Ritesh Patel	Apr 26, 2023 10:59 AM	7	VOID	VOID	1	\$ 10.70		
Ritesh Patel	Apr 26, 2023 10:49 AM	7	DELETE	Default Remark	1	\$ 10.70		
Ritesh Patel	Apr 26, 2023 10:48 AM	7	DELETE	Default Remark	1	\$ 5.35		
Ritesh Patel	Apr 26, 2023 10:48 AM	7	DELETE	Default Remark	1	\$ 10.63		
Ritesh Patel	Apr 26, 2023 10:45 AM	7	DELETE	Default Remark	1	\$ 10.00		
Ritesh Patel	Apr 26, 2023 10:43 AM	7	DELETE	Default Remark	1	\$ 10.70		
Ritesh Patel	Apr 26, 2023 10:41 AM	7	DELETE	Default Remark	1	\$ 10.70		
Ritesh Patel	Apr 26, 2023 10:40 AM	7	DELETE	Default Remark	1	\$ 10.70		
Ritesh Patel	Apr 26, 2023 10:39 AM	7	DELETE	Default Remark	1	\$ 10.70		
Ritesh Patel	Apr 26, 2023 10:38 AM	7	DELETE	Default Remark	1	\$ 10.70		
Ritesh Patel	Apr 26, 2023 10:37 AM	7	DELETE	Default Remark	1	\$ 10.70		
Ritesh Patel	Apr 26, 2023 10:35 AM	7	DELETE	Default Remark	1	\$ 10.70		
Ritesh Patel	Apr 26, 2023 10:28 AM	7	VOID	VOID	12	\$ 128.40		

10.6 Back Office - Cash Drawer Function Report

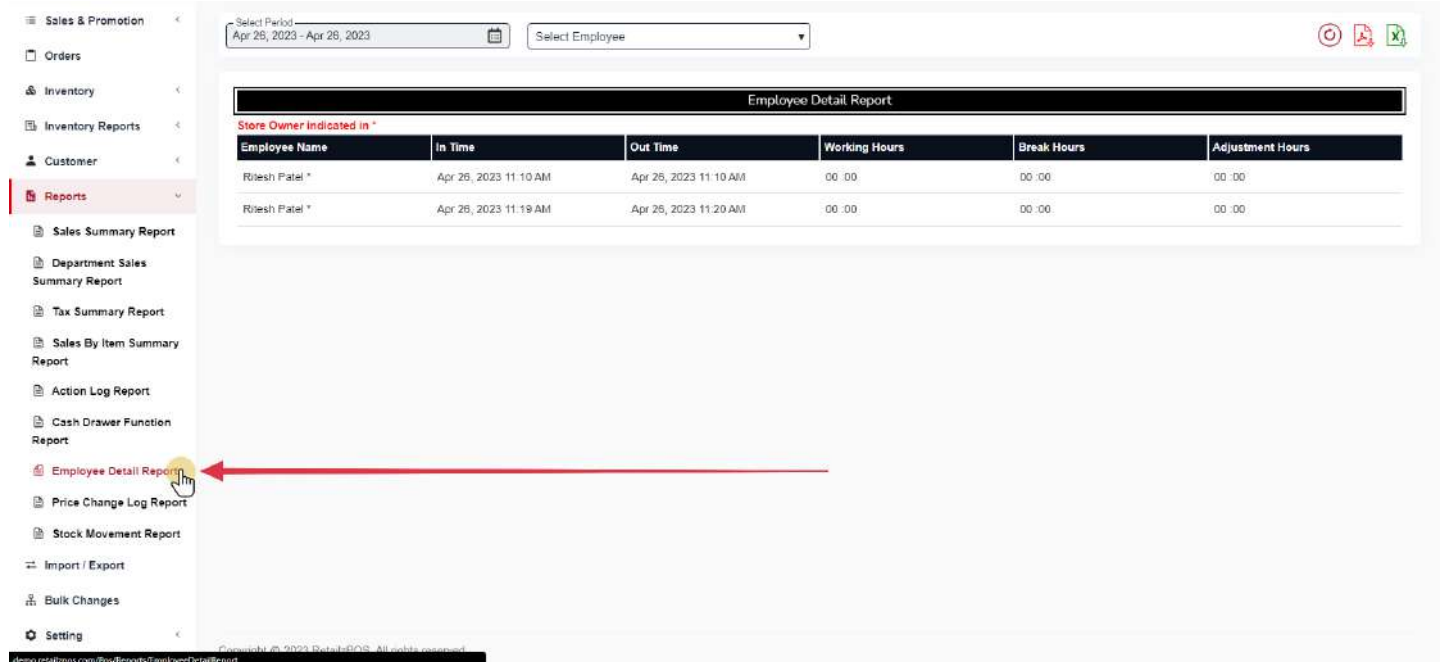
To view your cash drawer function report, click [Cash Drawer Function Report](#)

Select Period: Apr 26, 2023 - Apr 26, 2023 | Select Employee: | Select Operation: |

Cash Drawer Function Report							
Type	Date Time	Shift Id	Role Name	Reason	Distributor Name	Amount	Type
No Data							
TOTAL						\$ 0.00	
							PaidIn (+)
							\$ 0.00
							PaidOut (-)
							\$ 0.00
							Drop (-)
							\$ 0.00
TOTAL							\$ 0.00

10.7 Back Office - Employee Detail Report

To view your employee detail report, click **Employee Detail Report**



Select Period: Apr 26, 2023 - Apr 26, 2023 | Select Employee

Employee Detail Report

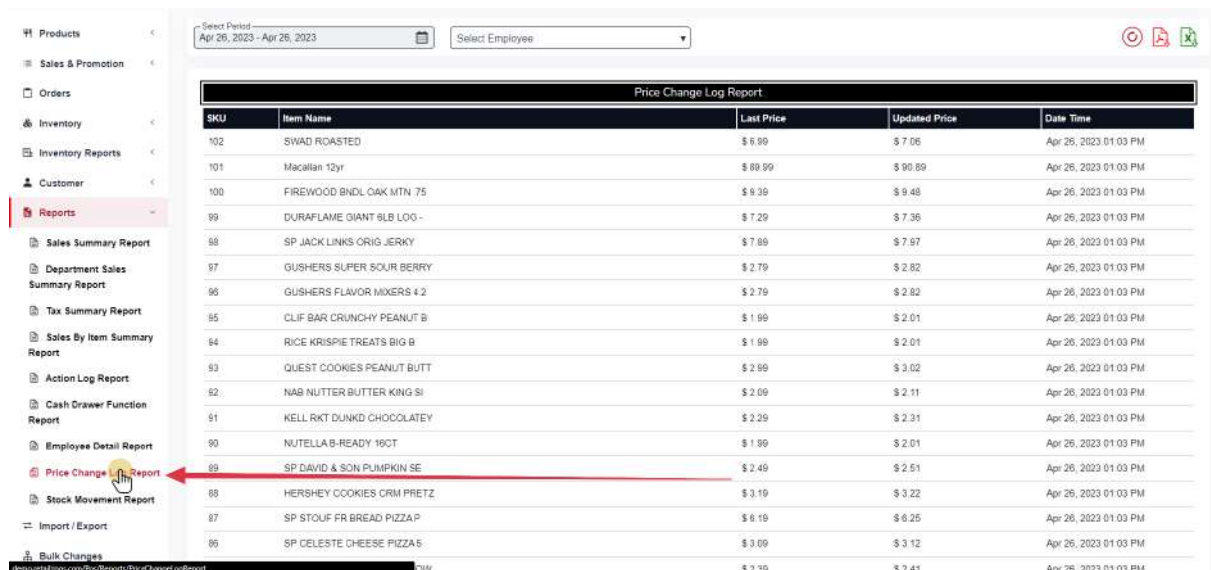
Store Owner Indicated in *

Employee Name	In Time	Out Time	Working Hours	Break Hours	Adjustment Hours
Ritesh Patel *	Apr 26, 2023 11:10 AM	Apr 26, 2023 11:10 AM	00:00	00:00	00:00
Ritesh Patel *	Apr 26, 2023 11:19 AM	Apr 26, 2023 11:20 AM	00:00	00:00	00:00

demo@retailsys.com/Pos/Reports/EmployeeDetailReport

10.8 Back Office - Price Change Log Report

To view your price change log report, click **Price Change Log Report**



Select Period: Apr 26, 2023 - Apr 26, 2023 | Select Employee

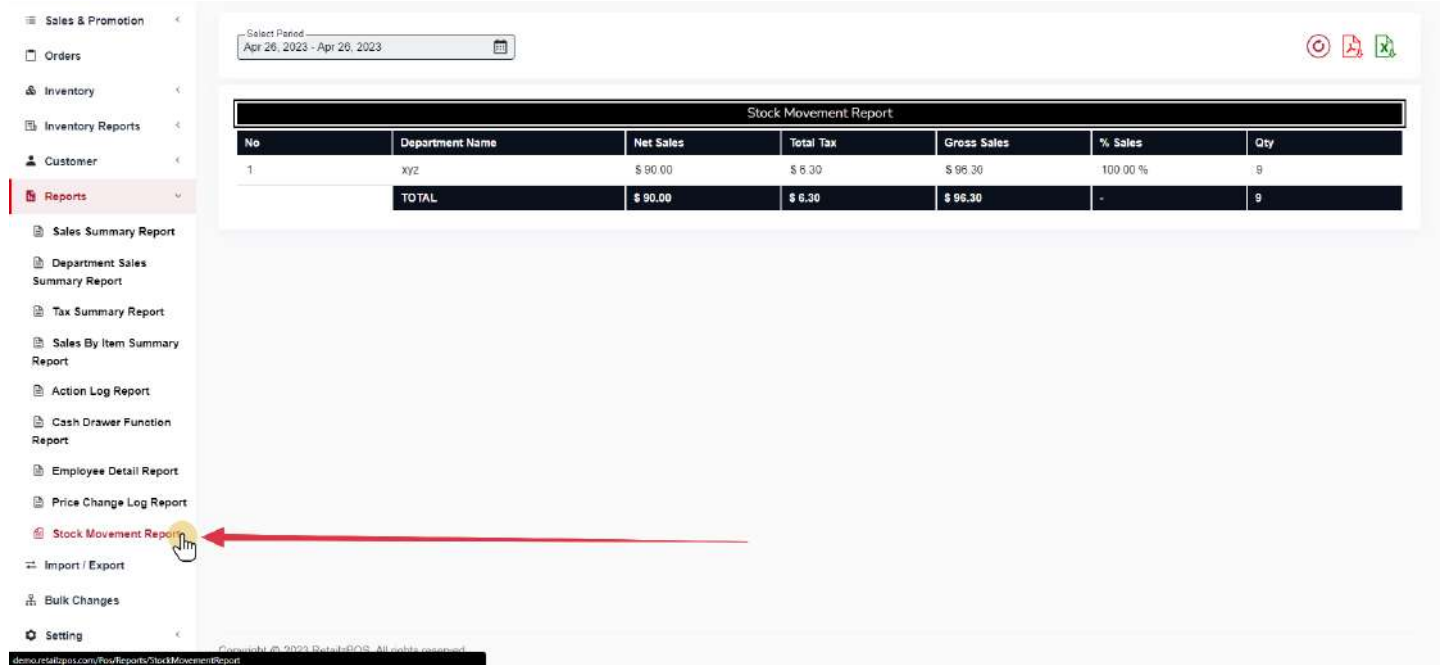
Price Change Log Report

SKU	Item Name	Last Price	Updated Price	Date Time
102	SWAD ROASTED	\$ 6.99	\$ 7.06	Apr 26, 2023 01:03 PM
101	Macellan 12yr	\$ 88.99	\$ 90.89	Apr 26, 2023 01:03 PM
100	FIREWOOD BNDL OAK MTN 75	\$ 9.39	\$ 9.48	Apr 26, 2023 01:03 PM
99	DURAFLAME GIANT 8LB LOG	\$ 7.29	\$ 7.36	Apr 26, 2023 01:03 PM
98	SP JACK LINKS ORIG JERKY	\$ 7.69	\$ 7.97	Apr 26, 2023 01:03 PM
97	GUSHERS SUPER SOUR BERRY	\$ 2.79	\$ 2.82	Apr 26, 2023 01:03 PM
96	GUSHERS FLAVOR MIXERS 4.2	\$ 2.79	\$ 2.82	Apr 26, 2023 01:03 PM
95	CLIF BAR CRUNCHY PEANUT B	\$ 1.99	\$ 2.01	Apr 26, 2023 01:03 PM
94	RICE KRISPIE TREATS BIG B	\$ 1.99	\$ 2.01	Apr 26, 2023 01:03 PM
93	QUEST COOKIES PEANUT BUTT	\$ 2.69	\$ 3.02	Apr 26, 2023 01:03 PM
92	NAB NUTTER BUTTER KING SI	\$ 2.09	\$ 2.11	Apr 26, 2023 01:03 PM
91	KELL RKT DUNKD CHOCOLATEY	\$ 2.29	\$ 2.31	Apr 26, 2023 01:03 PM
90	NUTELLA B-READY 19CT	\$ 1.99	\$ 2.01	Apr 26, 2023 01:03 PM
89	SP DAVID & SON PUMPKIN SE	\$ 2.49	\$ 2.51	Apr 26, 2023 01:03 PM
88	HERSHEY COOKIES CRM PRETZ	\$ 3.19	\$ 3.22	Apr 26, 2023 01:03 PM
87	SP STOUF FR BREAD PIZZA P	\$ 6.19	\$ 6.25	Apr 26, 2023 01:03 PM
86	SP CELESTE CHEESE PIZZA 5	\$ 3.09	\$ 3.12	Apr 26, 2023 01:03 PM
		\$ 2.39	\$ 2.41	Apr 26, 2023 01:03 PM

demo@retailsys.com/Pos/Reports/PriceChangeLogReport

10.9 Back Office - Stock Movement Report

To view your stock movement report, [click Stock Movement Report](#)



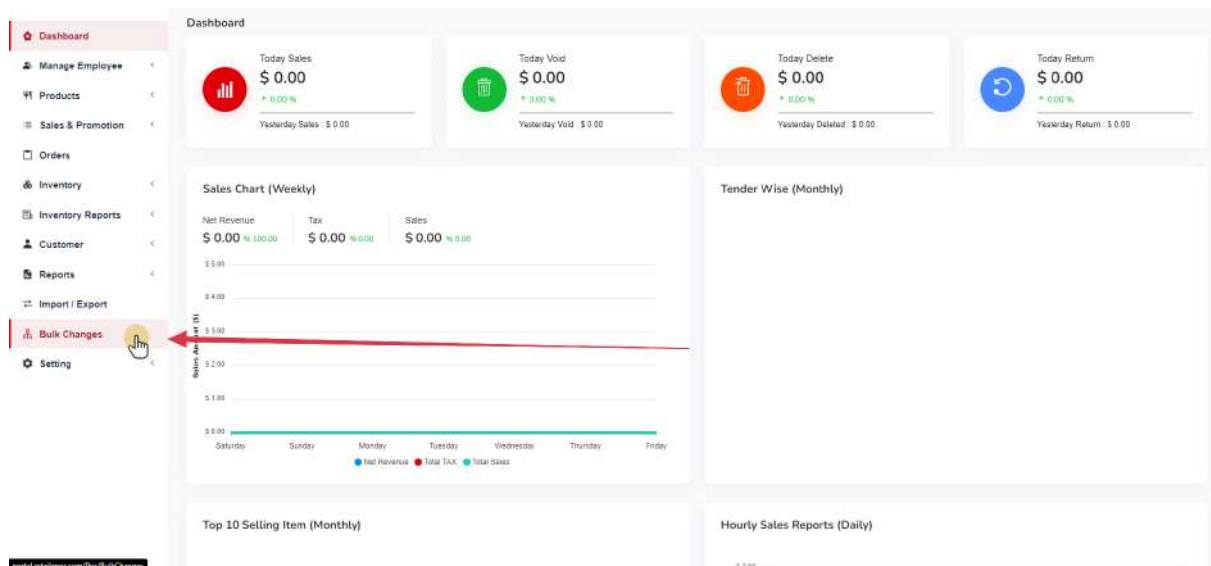
Select Period: Apr 26, 2023 - Apr 26, 2023

No	Department Name	Net Sales	Total Tax	Gross Sales	% Sales	Qty
1	XYZ	\$ 90.00	\$ 6.30	\$ 96.30	100.00 %	9
TOTAL		\$ 90.00	\$ 6.30	\$ 96.30	-	9

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demo.retailzpos.com/PosReports/StockMovementReport

11 Back Office - Bulk Changes

From the RetailzPOS [Back Office](#), click [Bulk Changes](#) to access your bulk change feature



Dashboard

Today Sales: \$ 0.00 (+ 0.00 %)
Yesterday Sales: \$ 0.00

Today Void: \$ 0.00 (+ 0.00 %)
Yesterday Void: \$ 0.00

Today Delete: \$ 0.00 (+ 0.00 %)
Yesterday Deleted: \$ 0.00

Today Return: \$ 0.00 (+ 0.00 %)
Yesterday Return: \$ 0.00

Sales Chart (Weekly)

Net Revenue	Tax	Sales
\$ 0.00 % 100.00	\$ 0.00 % 0.00	\$ 0.00 % 0.00

Tender Wise (Monthly)

Top 10 Selling Item (Monthly)

Hourly Sales Reports (Daily)

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demo.retailzpos.com/Pos/BulkChanges

11.1 Back Office - Bulk Changes Menu

In **Bulk Changes** you have the ability to edit multiple items all at once

Bulk Changes

Filters: Select Department, Select Category, Select Sub Category, Select Item Pack, Select Item Size, Select Brand, Select Distributor, Select Item Group, Select Lotto, Search by Item Name, Search by Price.

Buttons: Custom Filter, Reset Filter

Total Items: 2198 Selected Items: 8 + ADD

UPC	Item Name	Size	Pack	Cost	Price	State Tax (6.35 %)	City Tax (5 %)	TAX3 (0 %)	TAX4 (0 %)	TAX5 (0 %)
<input type="checkbox"/>	997815600511	Lotto Online	-	-	\$ 0.00	\$ 50.00	N	N	N	N
<input type="checkbox"/>	997815600512	Lotto Payout	-	-	\$ 0.00	\$ 508.75	N	N	N	N
<input type="checkbox"/>	997815600513	Lotto Scratch	-	-	\$ 0.00	\$ 65.99	N	N	N	N
<input type="checkbox"/>	0342480	REESES PIECES	-	-	\$ 0.58	\$ 1.39	Y	N	N	N
<input type="checkbox"/>	0345020	TWIZZLERS STR	-	-	\$ 0.58	\$ 1.39	Y	N	N	N
<input type="checkbox"/>	0400510	STARBURST ORI	7 oz	-	\$ 0.58	\$ 2.50	Y	N	N	N
<input type="checkbox"/>	0400310	M&M Plain 1.69 oz	-	-	\$ 0.58	\$ 1.89	Y	N	N	N
<input type="checkbox"/>	0183342	MICHELOB ULTR	-	6-PACK	\$ 0.00	\$ 5.55	Y	N	N	N
<input type="checkbox"/>	04799585523	AMERICAN SPIRIT	-	-	\$ 0.00	\$ 12.75	Y	N	N	N
<input type="checkbox"/>	04799585508	AMERICAN SPIRIT	-	-	\$ 0.00	\$ 12.89	Y	N	N	N
<input type="checkbox"/>	04799585522	AMERICAN SPIRIT	-	-	\$ 0.00	\$ 12.89	Y	N	N	N

Price & Tax | **Tag Along Item** | **Item Features**

Price

☒ By Amount ☐ By Percentage ☐ By RoundUp

☐ Price Change To ☐ Price Increase By ☐ Price Decrease By

Amount (\$)

☐ By As Case

Cost (\$) Buy Down (\$)

Case Cost (\$) Case Units

Tax

☐ Add ☐ Replace ☐ Remove **Clear**

☐ Non Taxable ☐ State Tax (6.35 %)

☐ City Tax (5.00 %) ☐ TAX3 (0.00 %)

☐ TAX4 (0.00 %) ☐ TAX5 (0.00 %)

11.1.1 Back Office - Bulk Changes Custom Filter

To search for items by customer filter, select **Custom Filter**

Bulk Changes

Filters: Select Department, Select Category, Select Sub Category, Select Item Pack, Select Item Size, Select Brand, Select Distributor, Select Item Group, Select Lotto, Search by Item Name, Search by Price.

Buttons: Custom Filter, Reset Filter

Total Items: 2206 Selected Items: 0 + ADD

UPC	Item Name	Size	Pack	Cost	Price	State Tax (6.35 %)	City Tax (5 %)	TAX3 (0 %)	TAX4 (0 %)	TAX5 (0 %)
<input type="checkbox"/>	0342400	HERSHEY'S MILK	-	-	\$ 0.00	\$ 1.89	Y	N	N	N
<input type="checkbox"/>	07033060009	BIG LIGHTER	-	-	\$ 0.00	\$ 3.39	Y	N	N	N
<input type="checkbox"/>	61126910171	REDBULL 8OZ S...	-	-	\$ 1.33	\$ 3.50	Y	N	N	N
<input type="checkbox"/>	61126935701	REDBULL RED E...	-	-	\$ 0.00	\$ 2.50	Y	N	N	N
<input type="checkbox"/>	61126900140	REDBULL 8OZ R...	-	-	\$ 0.00	\$ 2.99	Y	N	N	N
<input type="checkbox"/>	61126971946	REDBULL SUGA...	12 oz	-	\$ 1.79	\$ 3.99	Y	N	N	N
<input type="checkbox"/>	61126910900	REDBULL SUGA...	-	-	\$ 5.20	\$ 9.99	Y	N	N	N
<input type="checkbox"/>	61126910802	REGULAR REDB...	-	4-PACK	\$ 5.20	\$ 8.99	Y	N	N	N
<input type="checkbox"/>	04799585523	AMERICAN SPIRIT	-	-	\$ 0.00	\$ 12.75	Y	N	N	N
<input type="checkbox"/>	04799585508	AMERICAN SPIRIT	-	-	\$ 0.00	\$ 12.89	Y	N	N	N
<input type="checkbox"/>	04799585522	AMERICAN SPIRIT	-	-	\$ 0.00	\$ 12.89	Y	N	N	N
<input type="checkbox"/>	04799585522	AMERICAN SPIRIT	-	-	\$ 0.00	\$ 12.89	Y	N	N	N

Price & Tax | **Tag Along Item** | **Item Features**

Price

☒ By Amount ☐ By Percentage ☐ By RoundUp

☐ Price Change To ☐ Price Increase By ☐ Price Decrease By

Amount (\$)

☐ By As Case

Cost (\$) Buy Down (\$)

Case Cost (\$) Case Units

Tax

☐ Add ☐ Replace ☐ Remove **Clear**

☐ Non Taxable ☐ State Tax (6.35 %)

☐ City Tax (5.00 %) ☐ TAX3 (0.00 %)

☐ TAX4 (0.00 %) ☐ TAX5 (0.00 %)

11.1.2 Back Office - Submit Bulk Changes Filter

After selecting your customer filters for bulk changes, select **Submit**

The screenshot shows the 'Bulk Changes' section of the Back Office. A 'Custom Filter' dialog box is open, allowing users to filter items by various criteria. The dialog includes a 'Filter By' dropdown, 'Min Value' and 'Max Value' input fields, and several checkboxes for filtering options: 'All', 'Taxable Items', 'Non Taxable Items', 'In Active', 'Non Revenue', 'Non Discount Item', 'Food Stamp', 'Open Price', 'Tag Along Items', and 'No Department'. A red arrow points from the 'Submit' button in the dialog to the 'Submit' button in the main interface.

UPC	Item Name	Size	Pack	Cost	Price	State Tax (6.35 %)	City Tax (6 %)	TAX3 (0 %)	TAX4 (0 %)	TAX5 (0 %)
0342400	HERSHEY									
07033060005	BIG LIGHT									
61126910171	REDBULL									
61126935701	REDBULL									
61126900140	REDBULL									
61126971646	REDBULL SUGA...	12 oz		\$ 1.79	\$ 3.99	Y	N	N	N	N
61126910900	REDBULL SUGA...			\$ 5.20	\$ 9.99	Y	N	N	N	N
61126910802	REGULAR REDB...		4-PACK	\$ 5.20	\$ 8.99	Y	N	N	N	N
04799585623	AMERICAN SPIR...			\$ 0.00	\$ 12.75	Y	N	N	N	N
04799585508	AMERICAN SPIR...			\$ 0.00	\$ 12.89	Y	N	N	N	N
04799585622	AMERICAN SPIR...			\$ 0.00	\$ 12.89	Y	N	N	N	N
04799585507	AMERICAN SPIR...			\$ 0.00	\$ 12.89	Y	N	N	N	N

11.1.3 Back Office - Bulk Changes Select Item

Select items for bulk changes by clicking on the **checkbox** next to the item UPC

The screenshot shows the 'Bulk Changes' section of the Back Office. A table lists items with columns for UPC, Item Name, Size, Pack, Cost, Price, State Tax, City Tax, TAX3, TAX4, and TAX5. A red arrow points to the checkbox next to the item UPC 61126910802, which is highlighted in blue. The table also includes a 'Selected Items' count of 0 and an '+ ADD' button.

UPC	Item Name	Size	Pack	Cost	Price	State Tax (6.35 %)	City Tax (6 %)	TAX3 (0 %)	TAX4 (0 %)	TAX5 (0 %)
<input checked="" type="checkbox"/> 0342400	HERSHEY'S MILK			\$ 0.00	\$ 1.89	Y	N	N	N	N
<input checked="" type="checkbox"/> 07033060009	BIG LIGHTER			\$ 0.00	\$ 3.39	Y	N	N	N	N
<input checked="" type="checkbox"/> 61126910171	REDBULL 80Z S...			\$ 1.33	\$ 3.50	Y	N	N	N	N
<input checked="" type="checkbox"/> 61126935701	REDBULL 80Z E...			\$ 0.00	\$ 2.50	Y	N	N	N	N
<input checked="" type="checkbox"/> 61126900140	REDBULL 80Z R...			\$ 0.00	\$ 2.99	Y	N	N	N	N
<input checked="" type="checkbox"/> 61126971646	REDBULL SUGA...	12 oz		\$ 1.79	\$ 3.99	Y	N	N	N	N
<input checked="" type="checkbox"/> 61126910900	REDBULL SUGA...			\$ 5.20	\$ 9.99	Y	N	N	N	N
<input checked="" type="checkbox"/> 61126910802	REGULAR REDB...		4-PACK	\$ 5.20	\$ 8.99	Y	N	N	N	N
<input type="checkbox"/> 04799585623	AMERICAN SPIR...			\$ 0.00	\$ 12.75	Y	N	N	N	N
<input type="checkbox"/> 04799585508	AMERICAN SPIR...			\$ 0.00	\$ 12.89	Y	N	N	N	N
<input type="checkbox"/> 04799585622	AMERICAN SPIR...			\$ 0.00	\$ 12.89	Y	N	N	N	N
<input type="checkbox"/> 04799585507	AMERICAN SPIR...			\$ 0.00	\$ 12.89	Y	N	N	N	N

11.1.4 Back Office - Bulk Changes Add Item Selection

To add selected items for bulk change editing, click **+ADD**

The screenshot shows the 'Bulk Changes' interface. On the left is a sidebar with navigation links: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes (highlighted), and Setting. The main area has a header 'Bulk Changes' and a filter section with dropdowns for Department, Category, Sub Category, Item Pack, Item Size, Brand, Distributor, and Item Group, along with a 'Select Lotto' dropdown and search boxes for Item Name and Price. Below the filters, it shows 'Total Items: 2206' and 'Selected Items: 0'. A table lists items with columns: UPC, Item Name, Size, Pack, Cost, Price, State Tax (6.35 %), City Tax (5 %), TAX3 (0 %), TAX4 (0 %), and TAX5 (0 %). A red arrow points to the '+ADD' button in the top right corner of the table. To the right of the table are tabs for 'Price & Tax', 'Tag Along Item', and 'Item Features'. The 'Price & Tax' tab is active, showing options for 'By Amount', 'By Percentage', and 'By RoundUp', along with input fields for Price Change To, Price Increase By, Price Decrease By, By As Case, Cost (\$), Buy Down (\$), Case Cost (\$), and Case Units. The 'Tax' section has radio buttons for Add, Replace, and Remove, and checkboxes for Non Taxable, State Tax (6.35 %), City Tax (5.00 %), TAX3 (0.00 %), TAX4 (0.00 %), and TAX5 (0.00 %).

11.1.5 Back Office - View Bulk Change Item Selection

To view selected items in bulk changes, click **Selected Items**

The screenshot shows the 'Bulk Changes' interface with the 'Selected Items' tab highlighted. The table now shows 2198 total items and 0 selected items. A red arrow points to the 'Selected Items' tab. The table structure is the same as in the previous screenshot, but the 'Selected Items' column is now highlighted. The 'Price & Tax' tab is still active, showing the same options and input fields as before.

11.1.6 Back Office - Bulk Changes Price & Tax

To edit Price & Tax in bulk changes, select **Price & Tax** and make changes accordingly

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11.1.7 Back Office - Bulk Changes Tag Along Item

To edit Tag Along Items in bulk changes, select **Tag Along Items** and make changes accordingly

11.1.8 Back Office - Bulk Changes Item Features

To edit Item Features in bulk changes, select **Item Features** and make changes accordingly

Bulk Changes

0 Select Department 0 Select Category 0 Select Sub Category 0 Select Item Pack 0 Select Item Size 0 Select Brand

0 Select Distributor 0 Select Item Group Select Lotto Search by Item Name Search by Price

Custom Filter Reset Filter

Total Items: 2188 Selected Items: 8 REMOVE

UPC	Item Name	Size	Pack	Cost	Price	State Tax (6.35 %)	City Tax (5 %)	TAX3 (0 %)	TAX4 (0 %)	TAX5 (0 %)
<input type="checkbox"/> 0342400	HERSHEY'S MILK	-	-	\$ 0.00	\$ 1.89	Y	N	N	N	N
<input type="checkbox"/> 07033060009	BIC LIGHTER	-	-	\$ 0.00	\$ 3.39	Y	N	N	N	N
<input type="checkbox"/> 61126910171	REDBULL 8OZ S...	-	-	\$ 1.33	\$ 3.50	Y	N	N	N	N
<input type="checkbox"/> 61126935701	REDBULL RED E...	-	-	\$ 0.00	\$ 2.50	Y	N	N	N	N
<input type="checkbox"/> 61126900140	REDBULL 8OZ R...	-	-	\$ 0.00	\$ 2.99	Y	N	N	N	N
<input type="checkbox"/> 61126971646	REDBULL SUGA...	12 oz	-	\$ 1.79	\$ 3.99	Y	N	N	N	N
<input type="checkbox"/> 61126910900	REDBULL SUGA...	-	-	\$ 5.20	\$ 9.99	Y	N	N	N	N
<input type="checkbox"/> 61126910802	REGULAR REDB...	-	4-PACK	\$ 5.20	\$ 9.99	Y	N	N	N	N

Price & Tax Tag Along Item **Item Features**

Item Features

Select Department Select Category

Select Sub Category Select Item Group

Select Brand Select Size

Select Pack Select Distributor

Active/Inactive Apply Non Revenue

Apply EBT Apply Non Discountable

Loyalty Point Re-Order Qty

Select Age

Apply

11.1.9 Back Office - Bulk Changes Apply

When finished with selected changes in bulk changes, confirm your changes by clicking **Apply**

Bulk Changes

0 Select Department 0 Select Category 0 Select Sub Category 0 Select Item Pack 0 Select Item Size 0 Select Brand

0 Select Distributor 0 Select Item Group Select Lotto Search by Item Name Search by Price

Custom Filter Reset Filter

Total Items: 2188 Selected Items: 8 REMOVE

UPC	Item Name	Size	Pack	Cost	Price	State Tax (6.35 %)	City Tax (5 %)	TAX3 (0 %)	TAX4 (0 %)	TAX5 (0 %)
<input type="checkbox"/> 0342400	HERSHEY'S MILK	-	-	\$ 0.00	\$ 1.89	Y	N	N	N	N
<input type="checkbox"/> 07033060009	BIC LIGHTER	-	-	\$ 0.00	\$ 3.39	Y	N	N	N	N
<input type="checkbox"/> 61126910171	REDBULL 8OZ S...	-	-	\$ 1.33	\$ 3.50	Y	N	N	N	N
<input type="checkbox"/> 61126935701	REDBULL RED E...	-	-	\$ 0.00	\$ 2.50	Y	N	N	N	N
<input type="checkbox"/> 61126900140	REDBULL 8OZ R...	-	-	\$ 0.00	\$ 2.99	Y	N	N	N	N
<input type="checkbox"/> 61126971646	REDBULL SUGA...	12 oz	-	\$ 1.79	\$ 3.99	Y	N	N	N	N
<input type="checkbox"/> 61126910900	REDBULL SUGA...	-	-	\$ 5.20	\$ 9.99	Y	N	N	N	N
<input type="checkbox"/> 61126910802	REGULAR REDB...	-	4-PACK	\$ 5.20	\$ 9.99	Y	N	N	N	N

Price & Tax Tag Along Item Item Features

Item Features

Select Department Select Category

Select Sub Category Select Item Group

Select Brand Select Size

Select Pack Select Distributor

Active/Inactive Apply Non Revenue

Apply EBT Apply Non Discountable

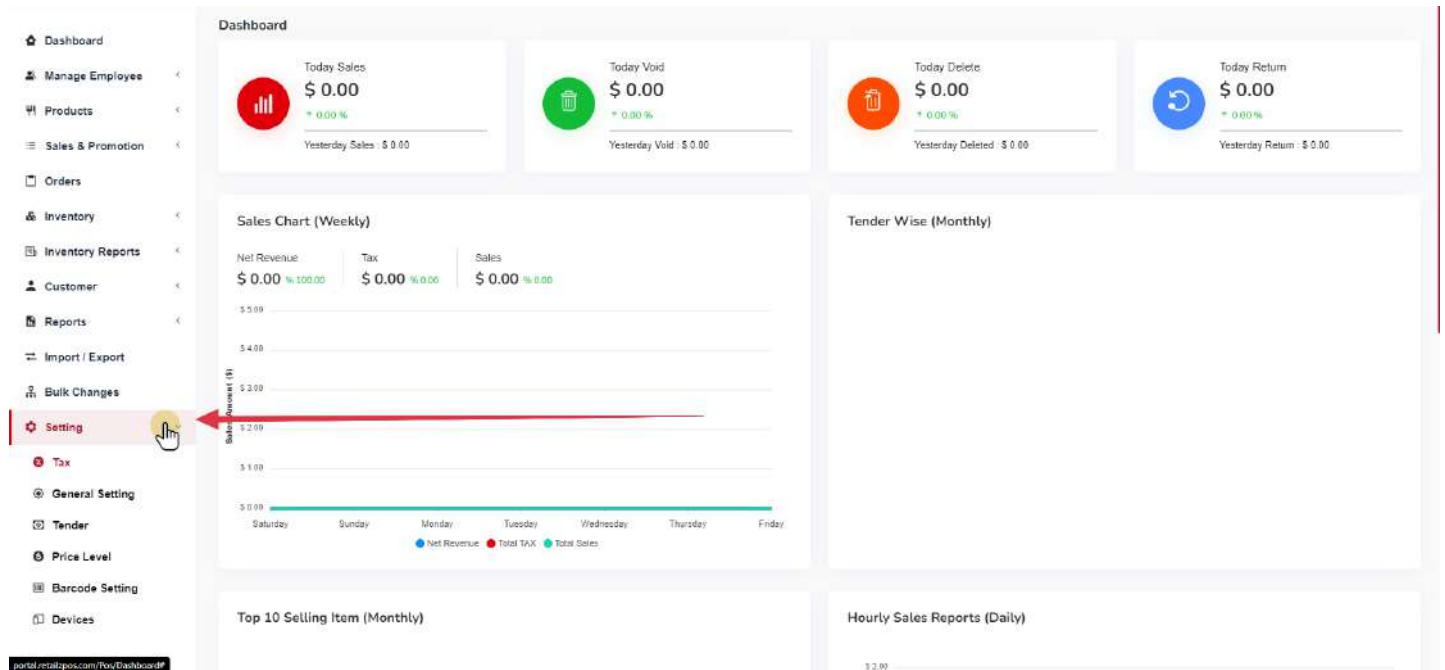
Loyalty Point Re-Order Qty

Select Age

Apply

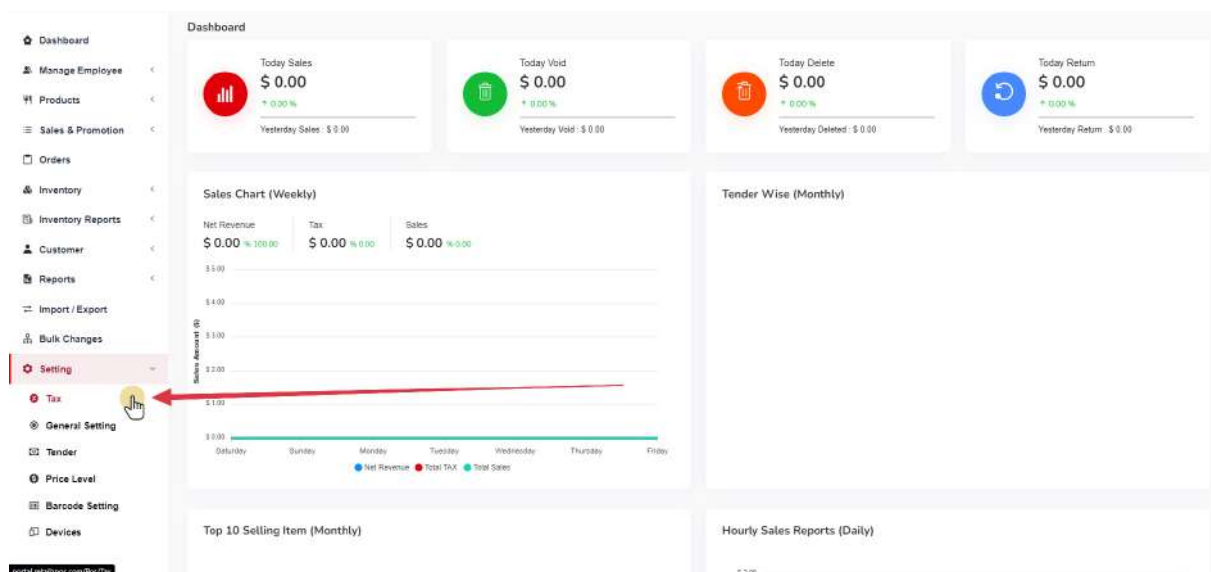
12 Back Office - Settings

From the RetailzPOS **Back Office**, click **Settings** to access your store settings menu



12.1 Back Office - Tax

From the RetailzPOS **Back Office**, click **Tax** to access your stores tax settings



12.1.1 Back Office - Edit Tax

To your store taxes, click the **green** edit button

The screenshot shows the 'Tax' management page in the Back Office. On the left is a sidebar with navigation options: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting (highlighted). Under 'Setting', there are sub-options: Tax, General Setting, Tender, Price Level, Barcode Setting, and Devices. The main content area displays a table of taxes. The table has columns: Title, Tax Value (%), Default Selected, and Status. The 'Status' column contains toggle switches. A red arrow points to the green edit button located at the top right of the table.

Title	Tax Value (%)	Default Selected	Status
State Tax	6.35 %	true	active
City Tax	5 %	false	active
TAX3	0 %	false	active
TAX4	0 %	false	active
TAX5	0 %	false	active

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12.1.2 Back Office - Save Tax

To save your tax setting, click **Submit**

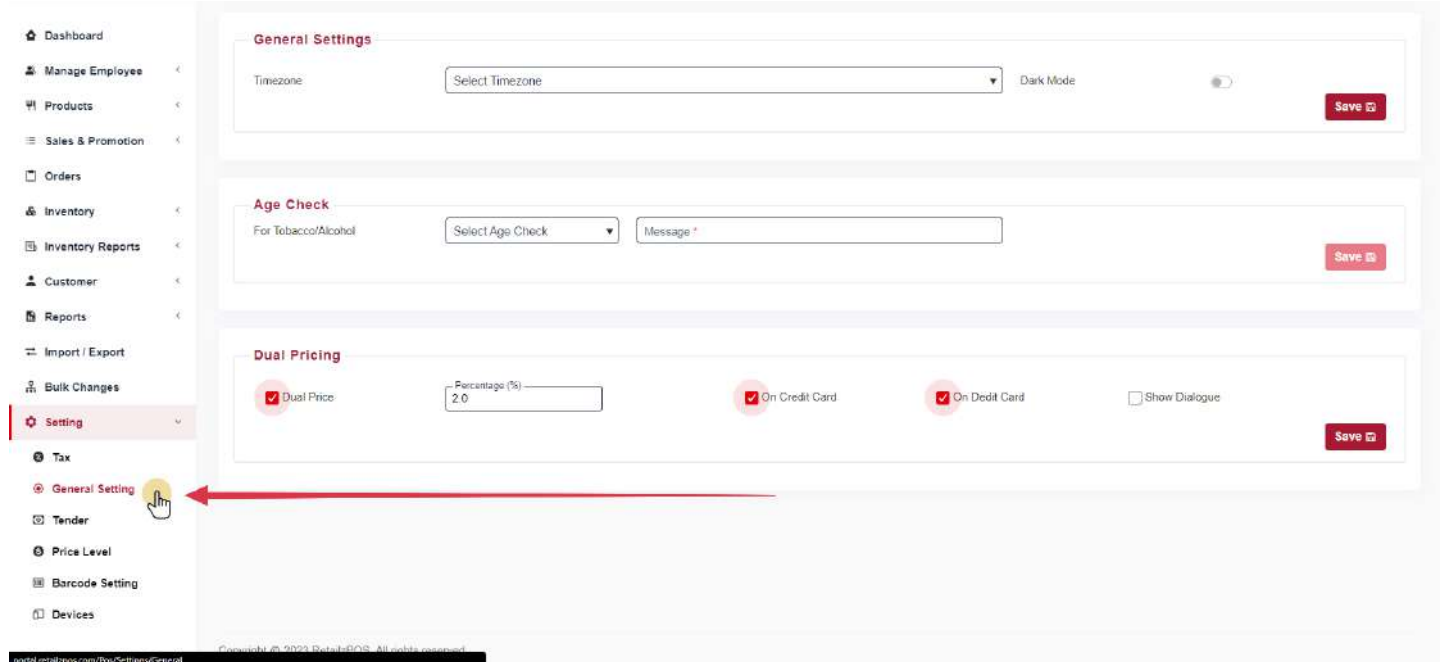
The screenshot shows the 'Edit Tax' modal window. The modal has a title bar 'Edit Tax' and a close button. It contains two input fields: 'Tax Name' with the value 'State Tax' and 'Percentage(%)' with the value '6.35'. At the bottom right of the modal is a red 'Submit' button. A red arrow points to this button. The background shows the same tax table as in the previous screenshot.

Title	Tax Value (%)	Default Selected	Status
State Tax	6.35 %	true	active
City Tax	5 %	false	active
TAX3	0 %	false	active
TAX4	0 %	false	active
TAX5	0 %	false	active

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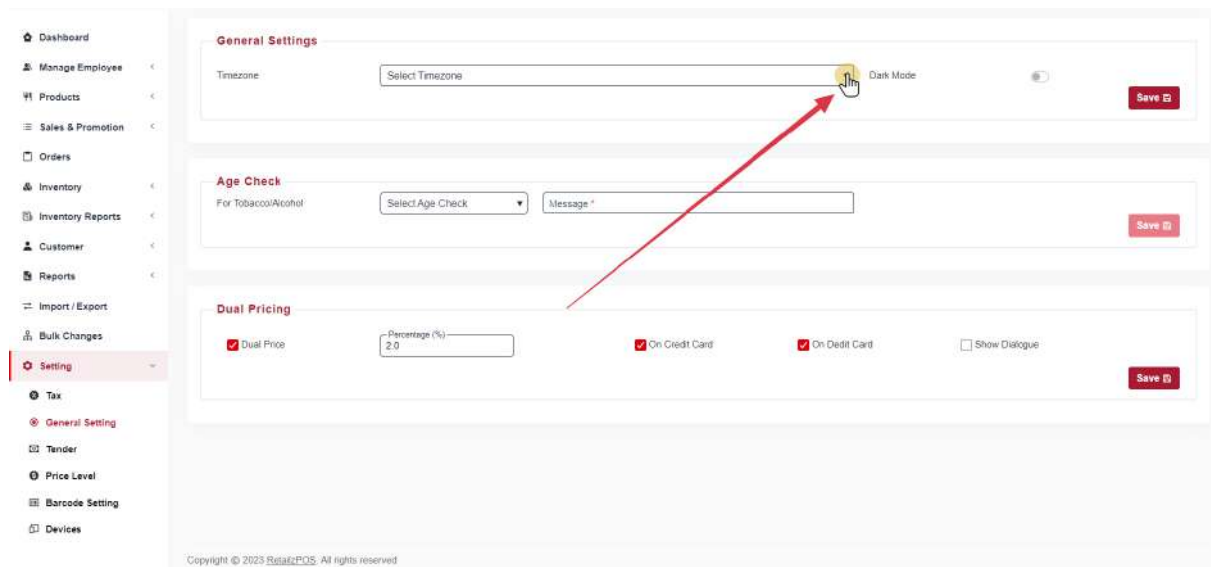
12.2 Back Office - General Settings

From the RetailzPOS **Back Office**, click **General Settings** to access your stores general settings



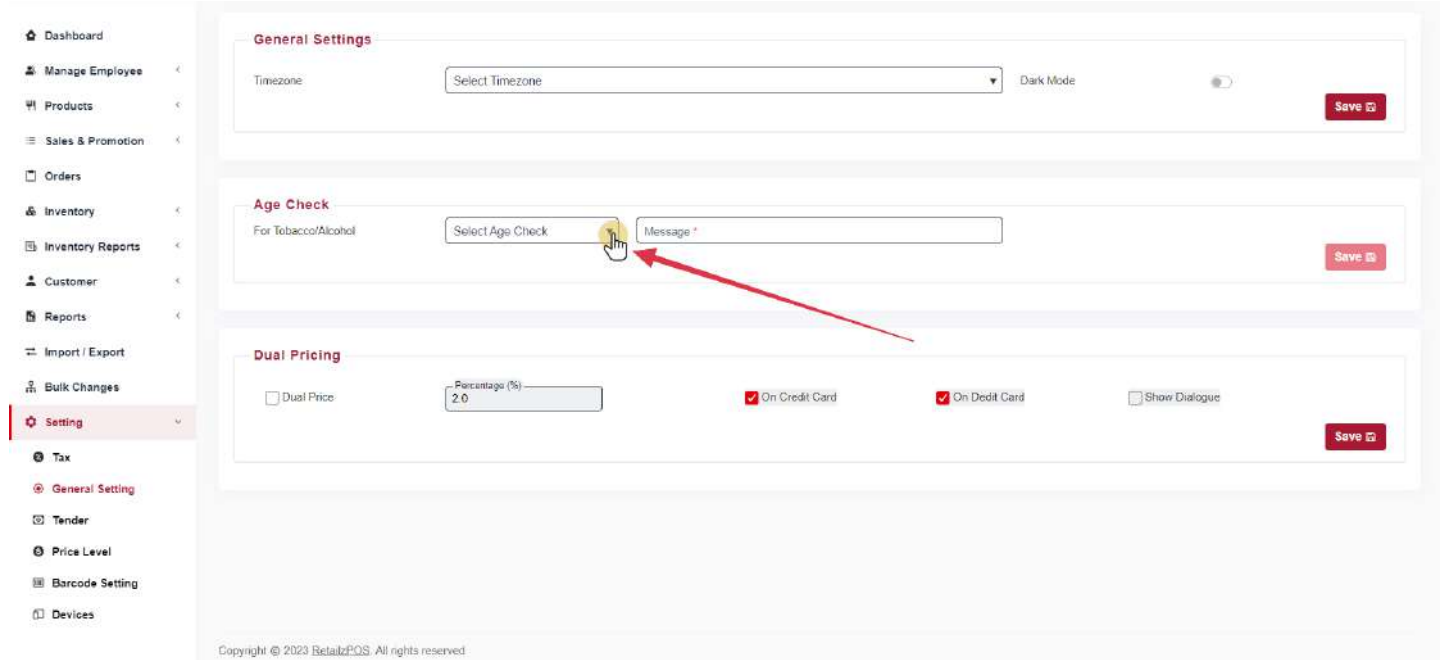
12.2.1 Back Office - Time Zone

To select your stores timezone, click **Select Timezone**



12.2.2 Back Office - Age Check Settings

To add age verification to tobacco/alcohol, click **Select Age Check**



General Settings

Timezone: Dark Mode: ☐ **Save**

Age Check

For Tobacco/Alcohol: **Save**

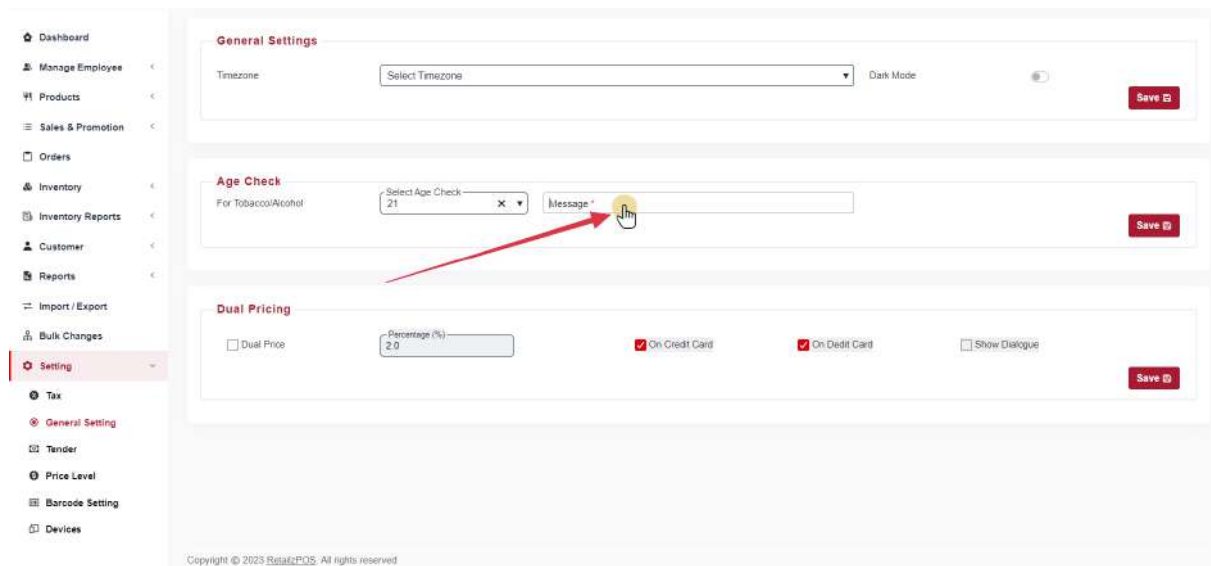
Dual Pricing

☐ Dual Price: Percentage (%) ☒ On Credit Card ☒ On Debit Card ☐ Show Dialogue **Save**

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12.2.3 Back Office - Age Check Sales Message

To add an age check sales message, click and enter in your **Sales Message**



General Settings

Timezone: Dark Mode: ☐ **Save**

Age Check

For Tobacco/Alcohol: **Save**

Dual Pricing

☐ Dual Price: Percentage (%) ☒ On Credit Card ☒ On Debit Card ☐ Show Dialogue **Save**

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12.2.4 Back Office - Dual Pricing

To enable dual pricing in your store, click **Dual Pricing**

The screenshot shows the 'General Settings' page in the Back Office. The left sidebar contains a menu with options: Dashboard, Manage Employee, Products, Sales & Promotion, Orders, Inventory, Inventory Reports, Customer, Reports, Import / Export, Bulk Changes, and Setting (highlighted). Under 'Setting', there are sub-options: Tax, General Setting (highlighted), Tender, Price Level, Barcode Setting, and Devices. The main content area has three sections: 'General Settings' with a 'Timezone' dropdown and a 'Dark Mode' toggle; 'Age Check' with a 'Select Age Check' dropdown (set to 21) and a 'Message' field (set to 'Do Not Sell Under 21'); and 'Dual Pricing' with a 'Dual Price' toggle switch (highlighted by a red arrow), a 'Percentage (%)' input field (set to 2.0), and checkboxes for 'On Credit Card', 'On Debit Card', and 'Show Dialogue'. A 'Save' button is at the bottom right of each section. The footer text reads 'Copyright © 2023 RetailPOS. All rights reserved.'

12.2.5 Back Office - Save General Settings

To save general settings, click **Save**

This screenshot is identical to the previous one, showing the 'General Settings' page. In this view, a red arrow points to the 'Save' button located at the bottom right of the 'Dual Pricing' section. The 'Dual Price' toggle switch is now checked, and the 'Show Dialogue' checkbox is also checked. The 'Save' button is highlighted by the red arrow.

12.3 Back Office - Tender

Tender

[Add](#) Total : \$

Name	Mode	Min. PaymentAmount	Min. Sign Amount
Debit Card	DEBITCARD	\$ 0.00	\$ 0.00
Credit Card	CREDITCARD	\$ 0.00	\$ 0.00
Cash	CASH	\$ 0.00	\$ 0.00
EBT	EBT	\$ 0.00	\$ 0.00
CHECK	CHEQUE	\$ 0.00	\$ 0.00
HOUSEACCOUNT	HOUSEACCOUNT	\$ 0.00	\$ 0.00

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12.3.1 Back Office - Add New Tender

To add a new tender type, click **Add**

Tender

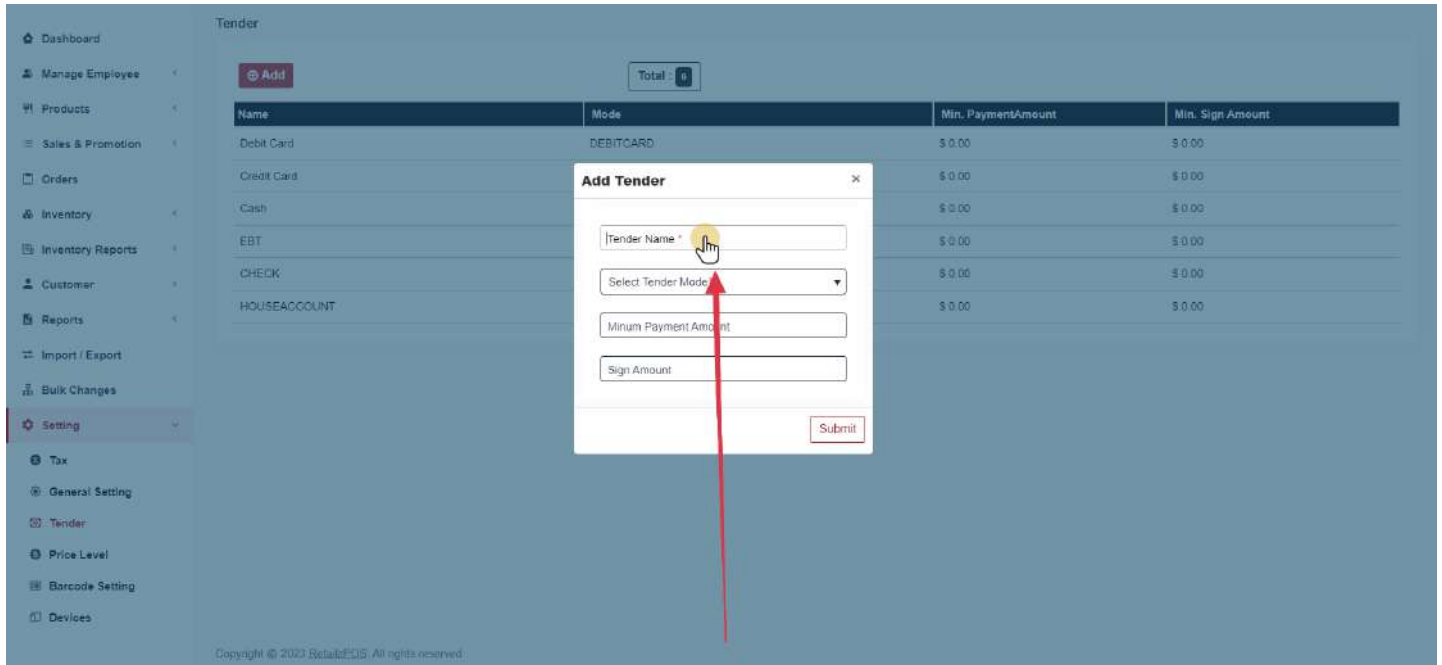
[Add](#) Total : \$

Name	Mode	Min. PaymentAmount	Min. Sign Amount
Debit Card	DEBITCARD	\$ 0.00	\$ 0.00
Credit Card	CREDITCARD	\$ 0.00	\$ 0.00
Cash	CASH	\$ 0.00	\$ 0.00
EBT	EBT	\$ 0.00	\$ 0.00
CHECK	CHEQUE	\$ 0.00	\$ 0.00
HOUSEACCOUNT	HOUSEACCOUNT	\$ 0.00	\$ 0.00

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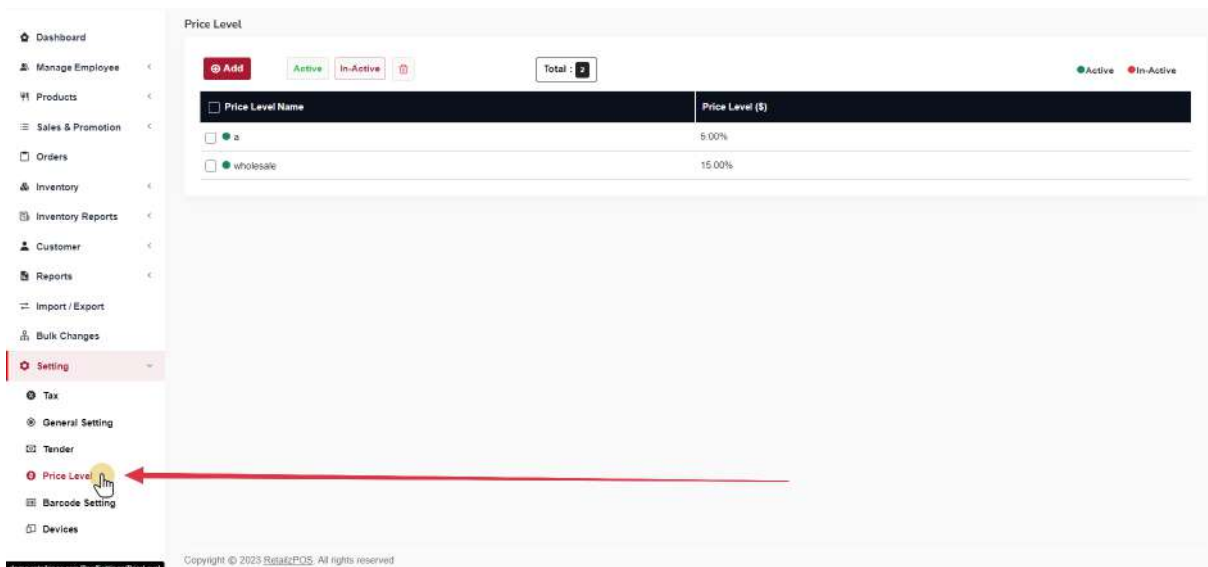
12.3.2 Back Office - New Tender Information

When creating a new tender, always provide the information as needed



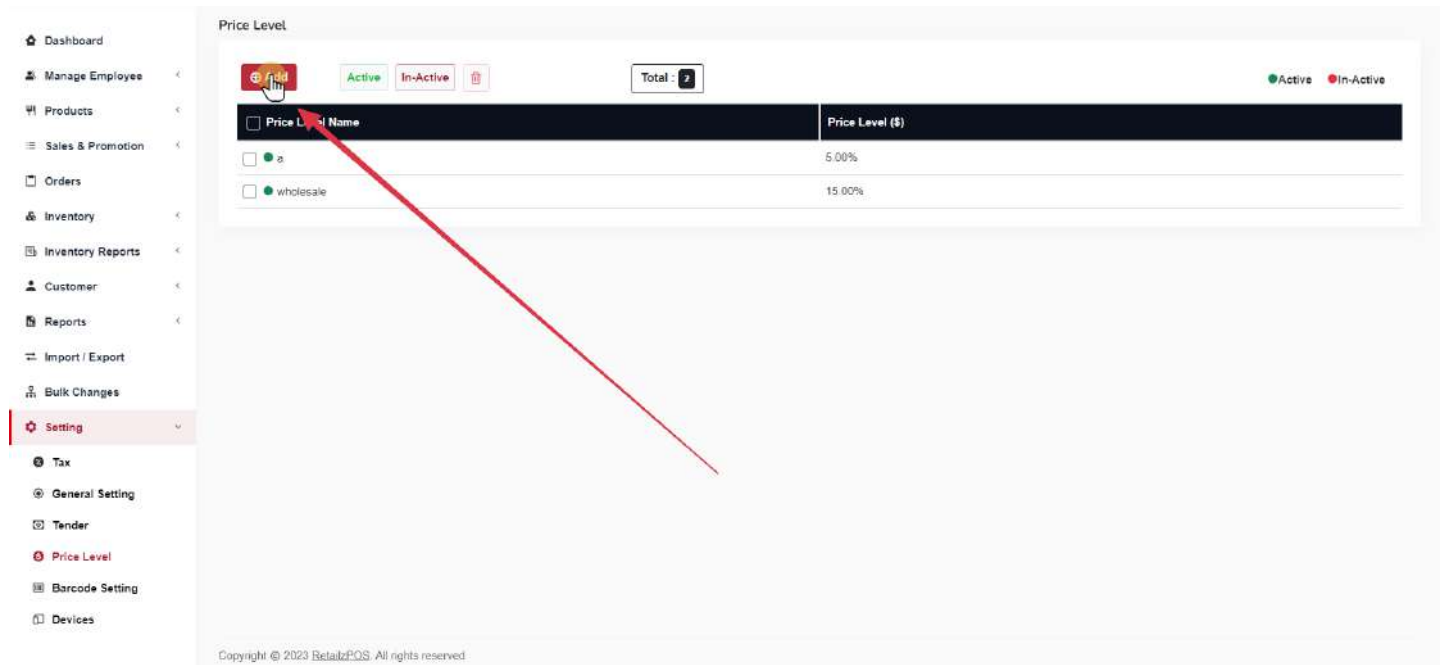
12.4 Back Office - Price Level

From the RetailzPOS **Back Office**, click **Price Level** to access your store price level list



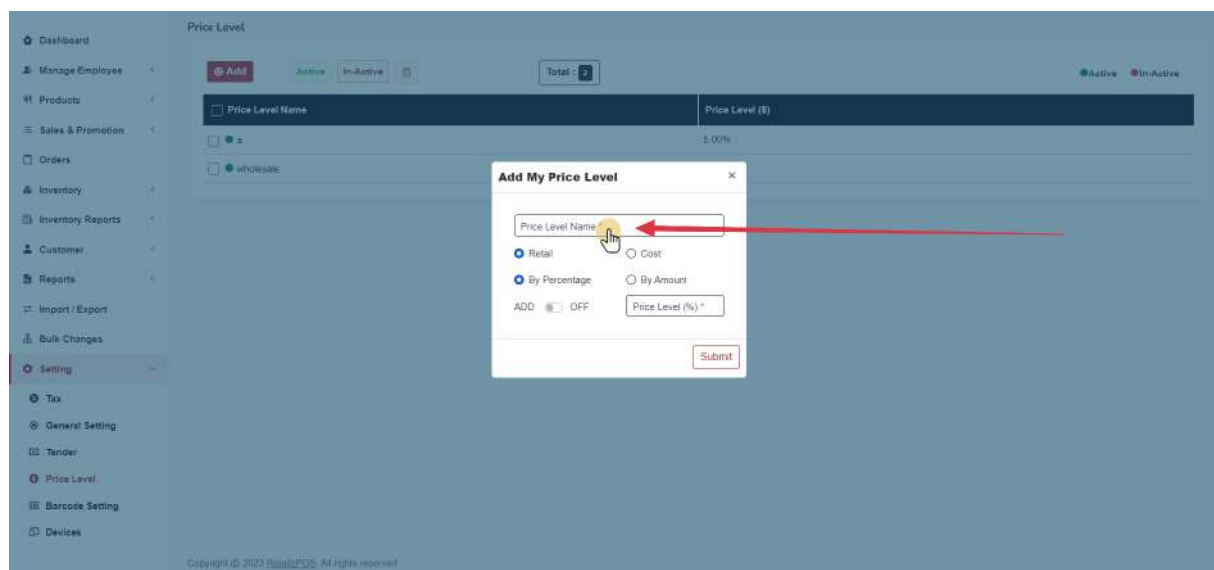
12.4.1 Back Office - Add New Price Level

To add a new price level, click **Add**



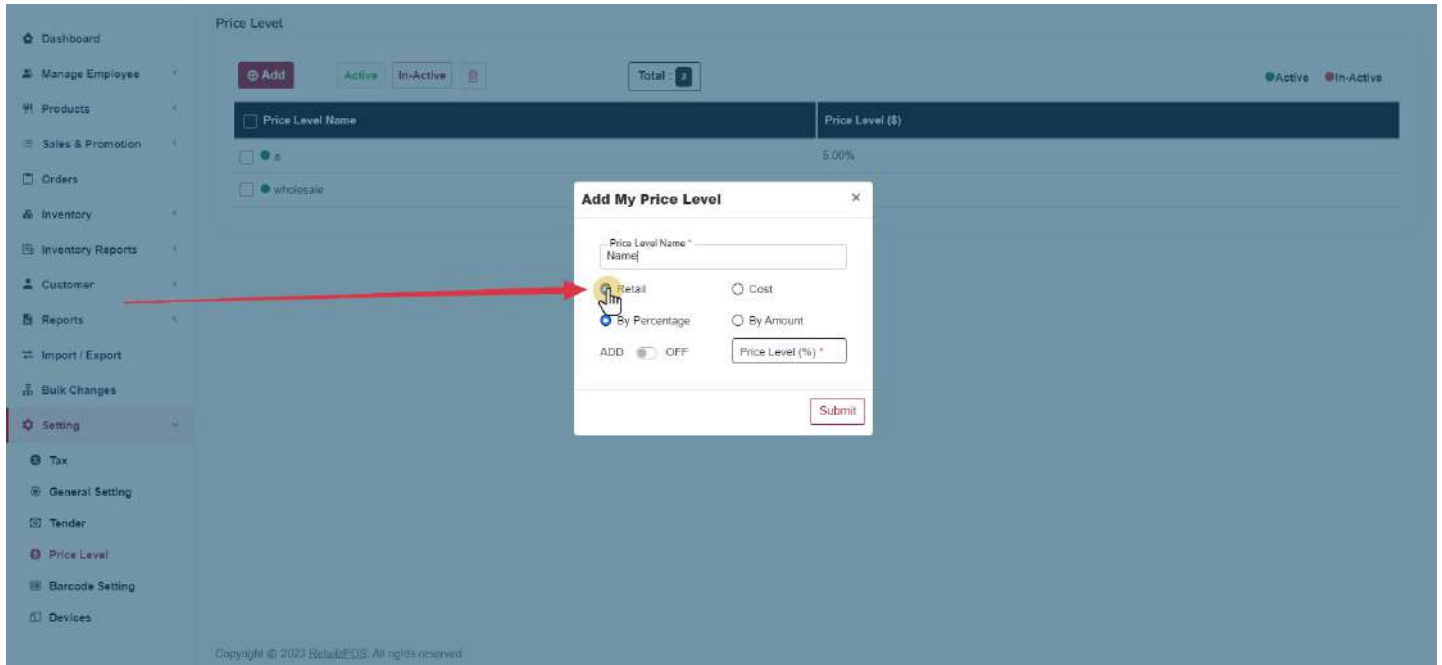
12.4.2 Back Office - Price Level Name

When adding a new price level, provide a **Price Level Name**



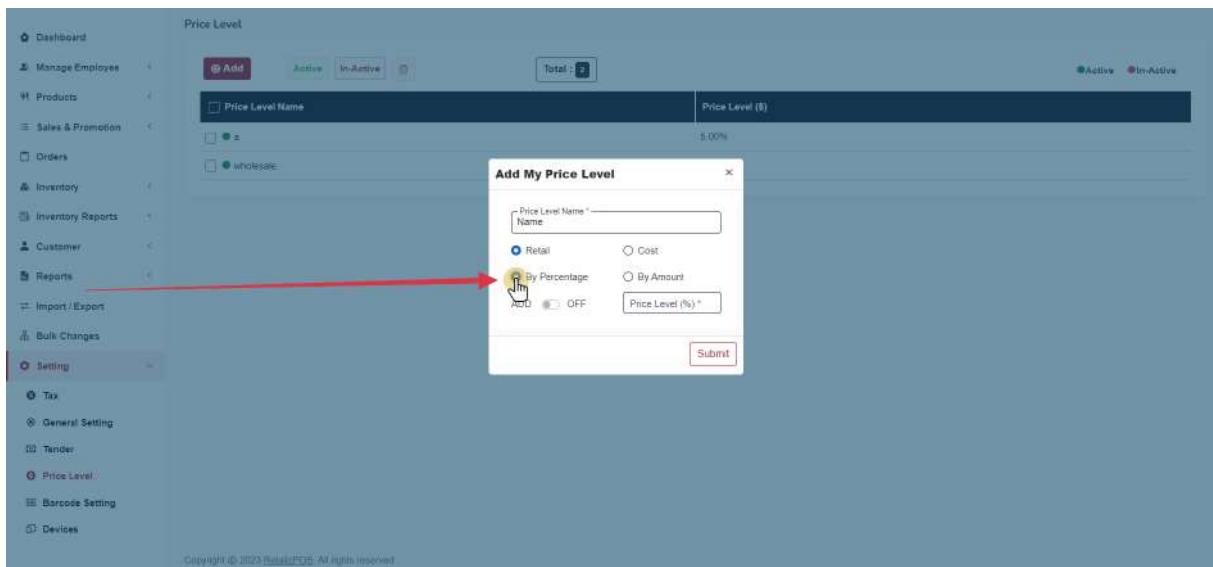
12.4.3 Back Office - Price Level Retail/Cost

Select if your price level is **Retail** or **Cost**



12.4.4 Back Office - Price Level By Percentage/Amount

Select if your price level is **By Percentage** or **By Amount**



12.4.5 Back Office - Price Level Value

Enter your **Price Level Value** (\$ or %)

The screenshot shows the 'Add My Price Level' dialog box. The 'Price Level Name' field is empty. The 'Retail' radio button is selected. The 'By Percentage' radio button is selected. The 'Price Level (%)' field contains the value '5.00%'. A red arrow points to the 'Price Level (%)' field. The 'Submit' button is visible at the bottom right of the dialog box.

12.4.6 Back Office - Save Price Level

To save your price level, click **Submit**

The screenshot shows the 'Add My Price Level' dialog box. The 'Price Level Name' field is empty. The 'Retail' radio button is selected. The 'By Percentage' radio button is selected. The 'Price Level (%)' field contains the value '5.00%'. A red arrow points to the 'Submit' button at the bottom right of the dialog box.

12.4.7 Back Office - Edit Price Level

To edit a price level, hover over the name and click the **green** edit button

The screenshot displays the 'Price Level' management interface. On the left, a sidebar menu lists various settings, with 'Price Level' highlighted under the 'Setting' category. The main content area shows a table with the following data:

Price Level Name	Price Level (\$)
Name	5.00%
a	5.00%
wholesale	15.00%

At the top of the table, there are buttons for 'Add', 'Active', 'In-Active', and a 'Total: 3' indicator. A red arrow points to the green edit button in the 'Name' row. The footer of the interface includes the copyright notice: 'Copyright © 2023 RetailPOS. All rights reserved.'

12.4.8 Back Office - Delete Price Level

To delete a price level, hover over the name and click the **red** delete button

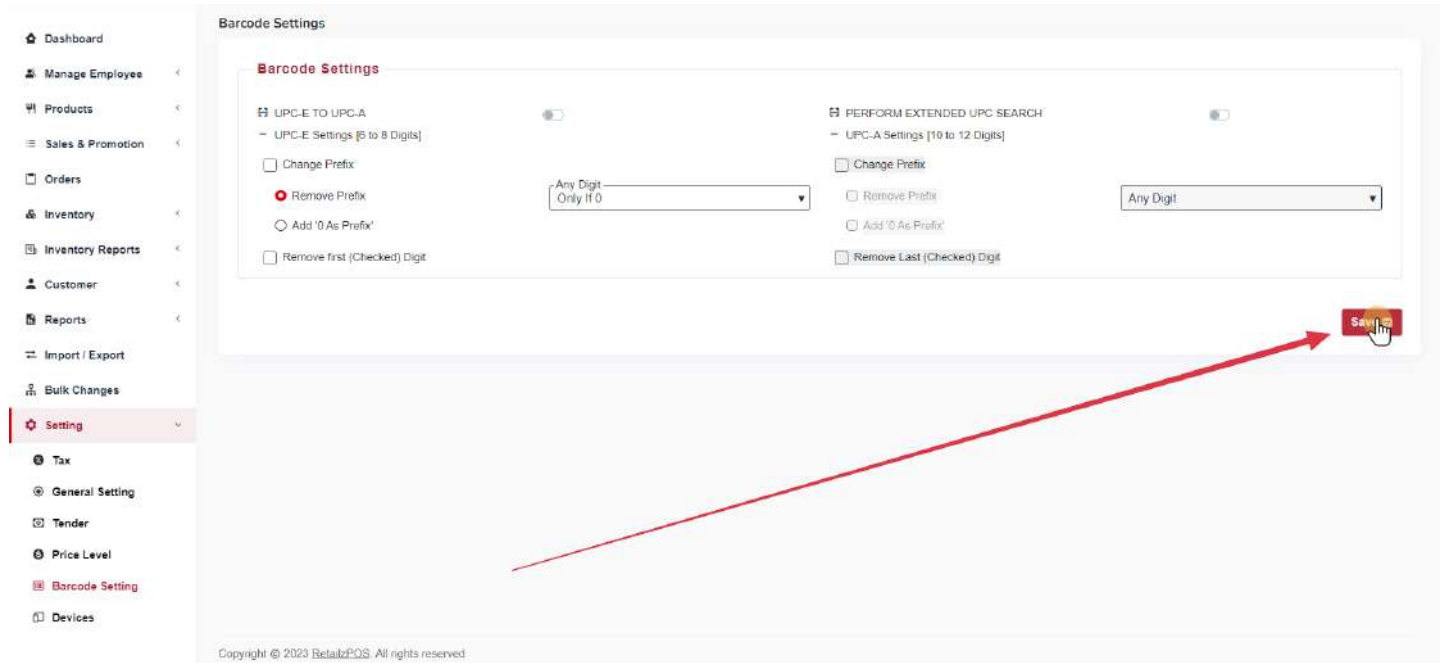
The screenshot displays the 'Price Level' management interface. The left sidebar shows the 'Setting' menu with 'Price Level' selected. The main content area shows a table with the following data:

Price Level Name	Price Level (\$)
<input type="checkbox"/> Name	5.00%
<input type="checkbox"/> a	5.00%
<input type="checkbox"/> wholesale	15.00%

A red arrow points to the delete button (a red square with a white 'X') in the 'Name' row. The top bar includes 'Add', 'Active', 'In-Active', and 'Total: 3' buttons. The bottom of the page shows the copyright notice: 'Copyright © 2023 RetailPOS. All rights reserved.'

12.5 Back Office - Save Barcode Settings

If any changes are made to these settings, always make sure to **Save**



12.5.1 Back Office - Barcode Settings

From the RetailzPOS **Back Office**, click **Barcode Settings** to access your store barcode settings

