

# **RetailzPOS Mobile App User Manual**

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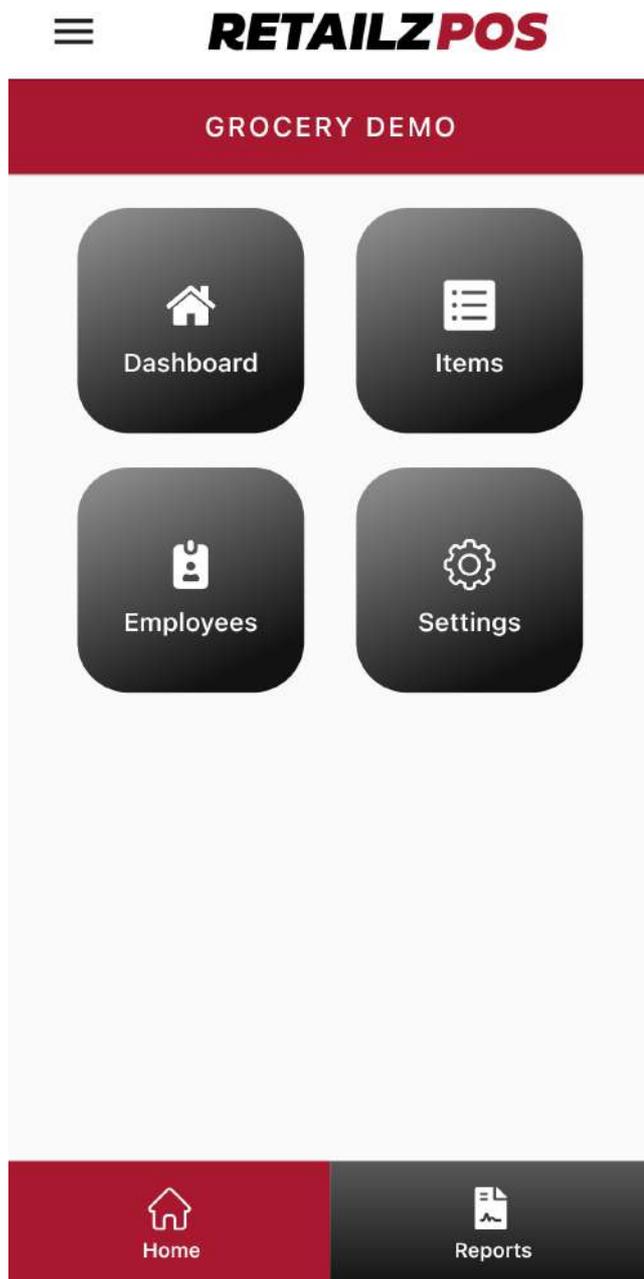
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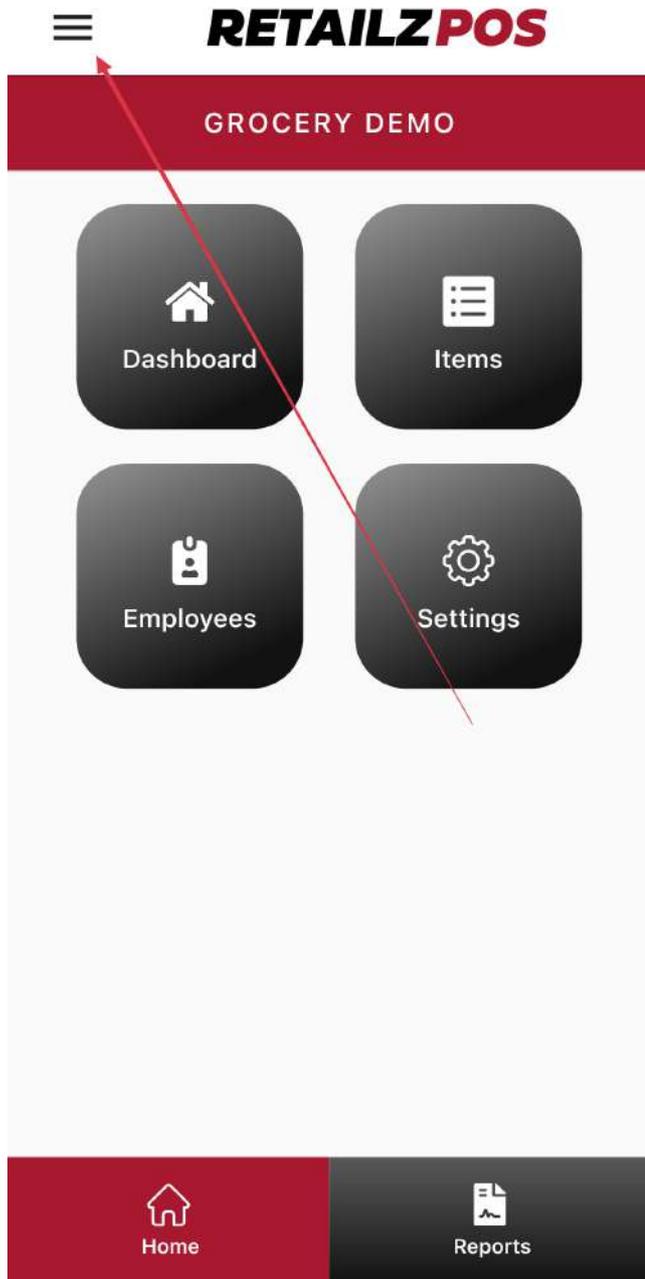
## 1 Mobile App - Main Menu

From the main menu you can access features such as Dashboard; Items; Employees; Settings; and the Dropdown Menu



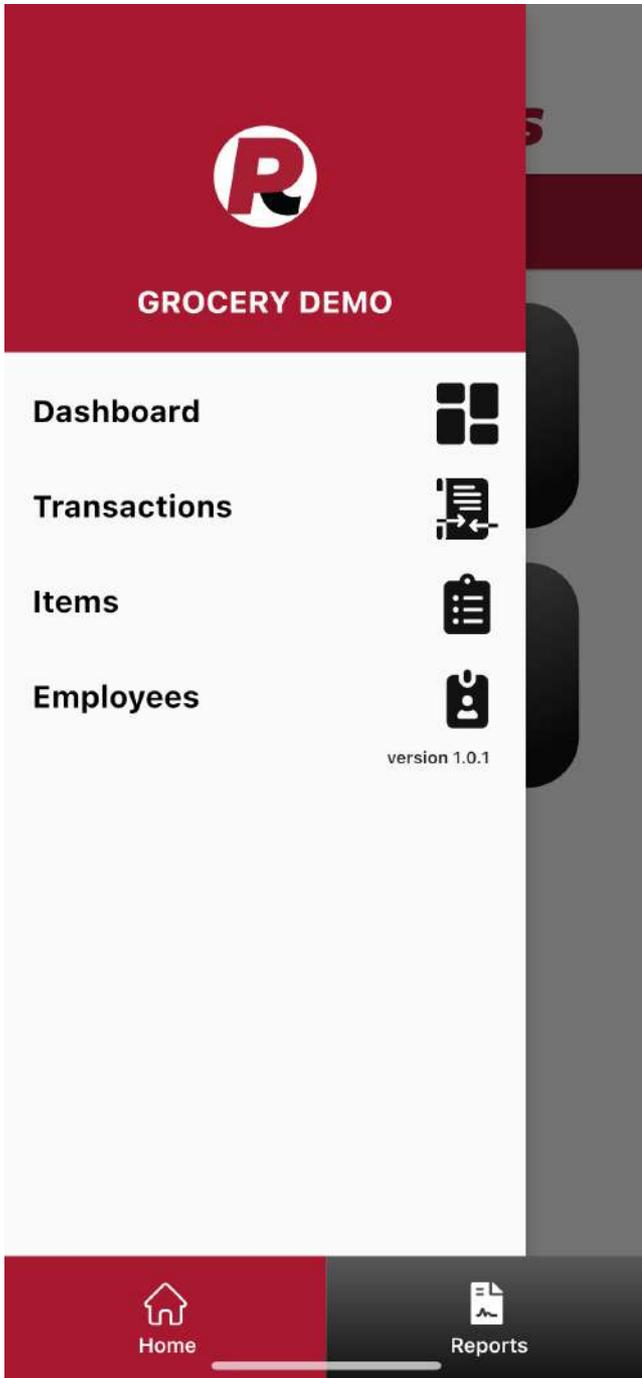
## 2 Mobile App - Access Mobile App Dropdown Tab

To access the dropdown menu, tap the three horizontal bars button



## 2.1 Mobile App - Dropdown Tab

From the Dropdown Menu you can access features such as Dashboard; Transactions; Items; and Employees



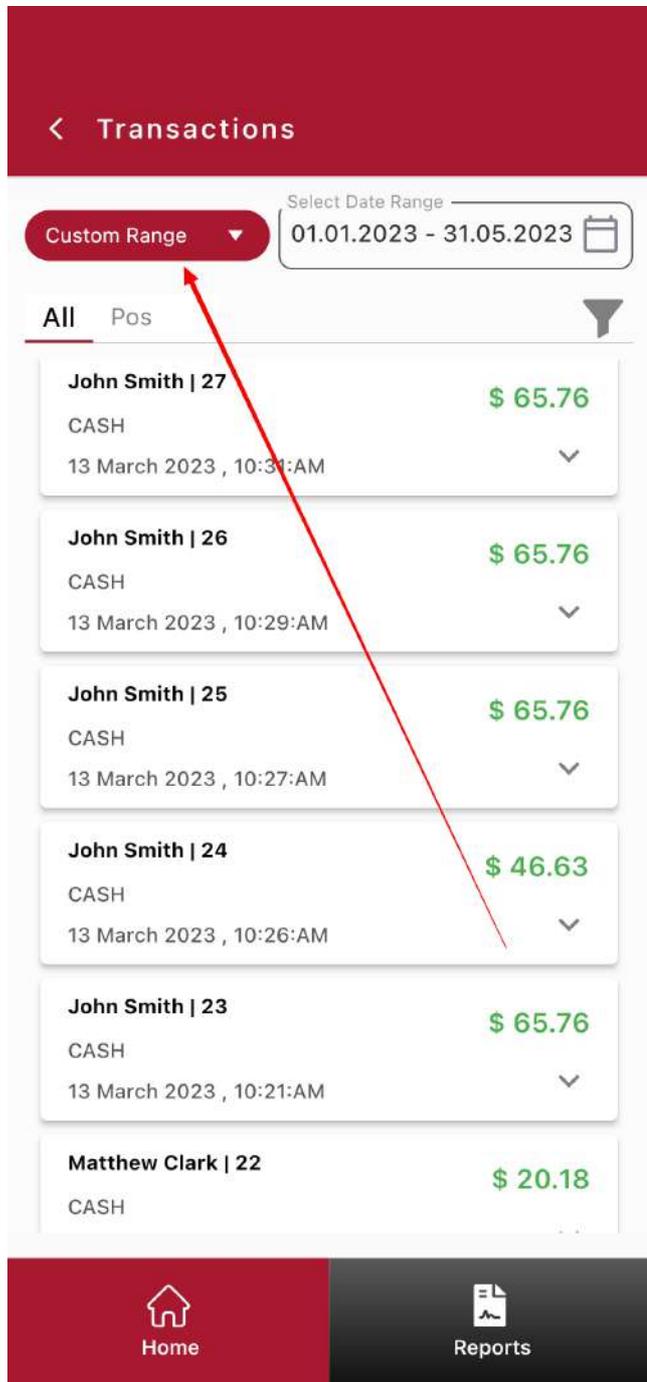
### 3 Mobile App - Access Transactions

To access your stores live transaction list, tap Transactions



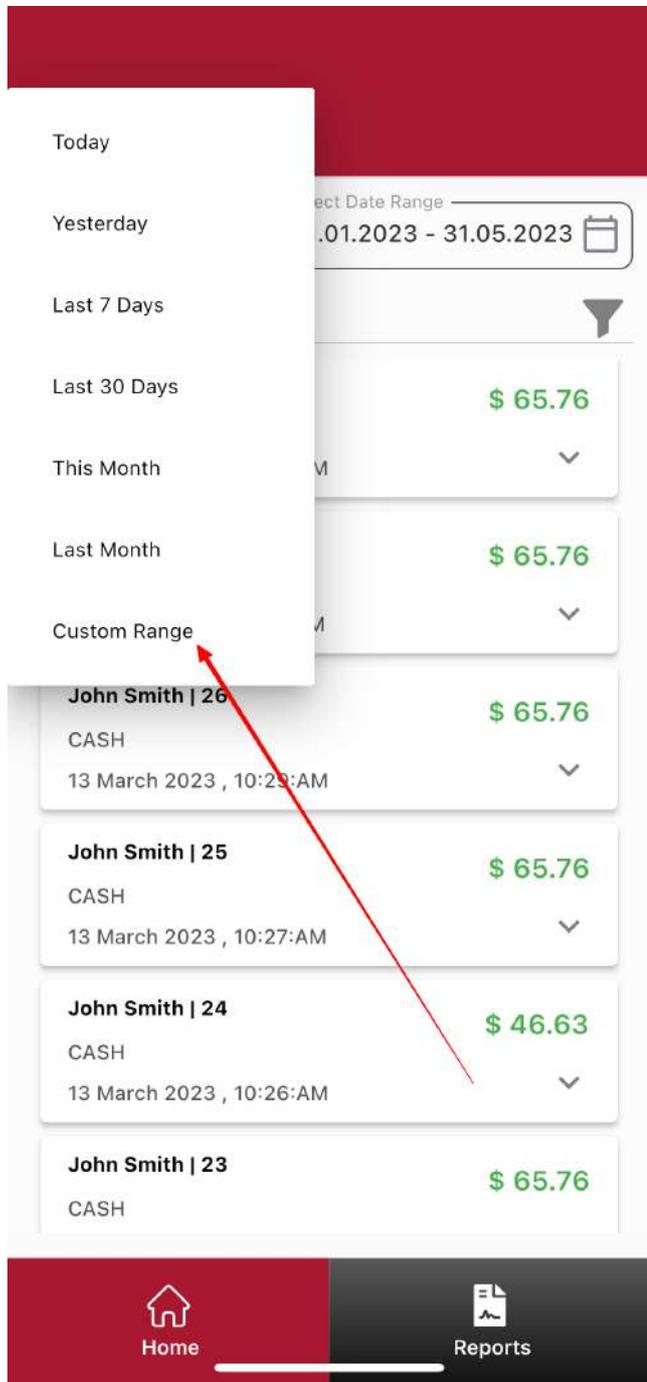
### 3.1 Mobile App - Filter Date Range

To filter transactions, select your filter date



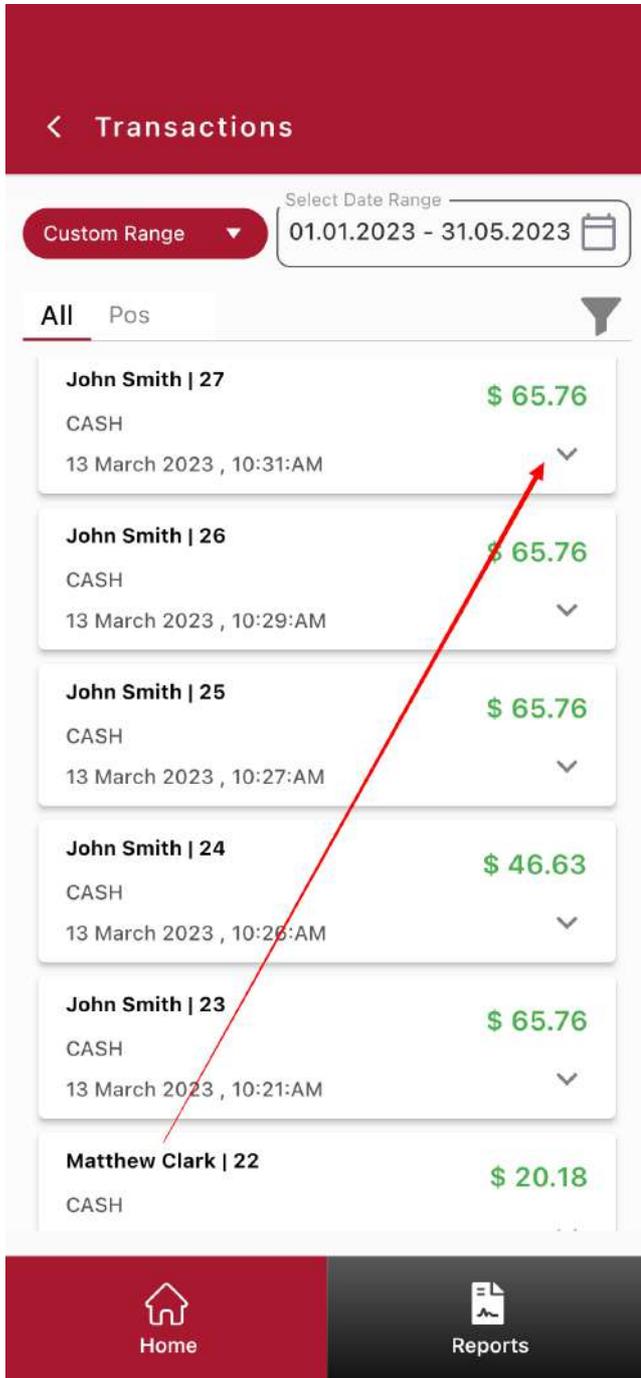
### 3.1.1 Mobile App - Transaction Filter By Date

Tap to select your specific folder date



## 3.2 Mobile App - Select Transaction

Tap a transaction to open the receipt



### 3.3 Mobile App - Transaction Receipt

Your transaction receipts will show you information such as the bill amount and the date and time of the transaction

The screenshot displays the 'Transactions' screen in the RetailzPOS mobile app. At the top, there is a red header with a back arrow and the text 'Transactions'. Below the header, there is a date range filter set to '01.01.2023 - 31.05.2023'. The main content area shows a list of transactions for 'John Smith'. Each transaction entry includes the name, amount (\$ 65.76), payment method (CASH), and time. The first transaction is dated 13 March 2023, 10:31:AM. Below the list, there is a detailed view of a transaction showing the 'Pos OrderId' (6OI-20230313103125953), 'Sub Total' (\$ 61.84), 'Tax' (\$ 3.92), 'Discount' (\$ 0.00), and 'Status' (Completed). There is also an 'Invoice' section with a 'Download' button. At the bottom, there is a navigation bar with 'Home' and 'Reports' icons.

Transaction ID	Amount	Payment Method	Date and Time
John Smith   27	\$ 65.76	CASH	13 March 2023, 10:31:AM
John Smith   26	\$ 65.76	CASH	13 March 2023, 10:29:AM
John Smith   25	\$ 65.76	CASH	13 March 2023, 10:27:AM

## 3.4 Mobile App - Download & Print Receipt

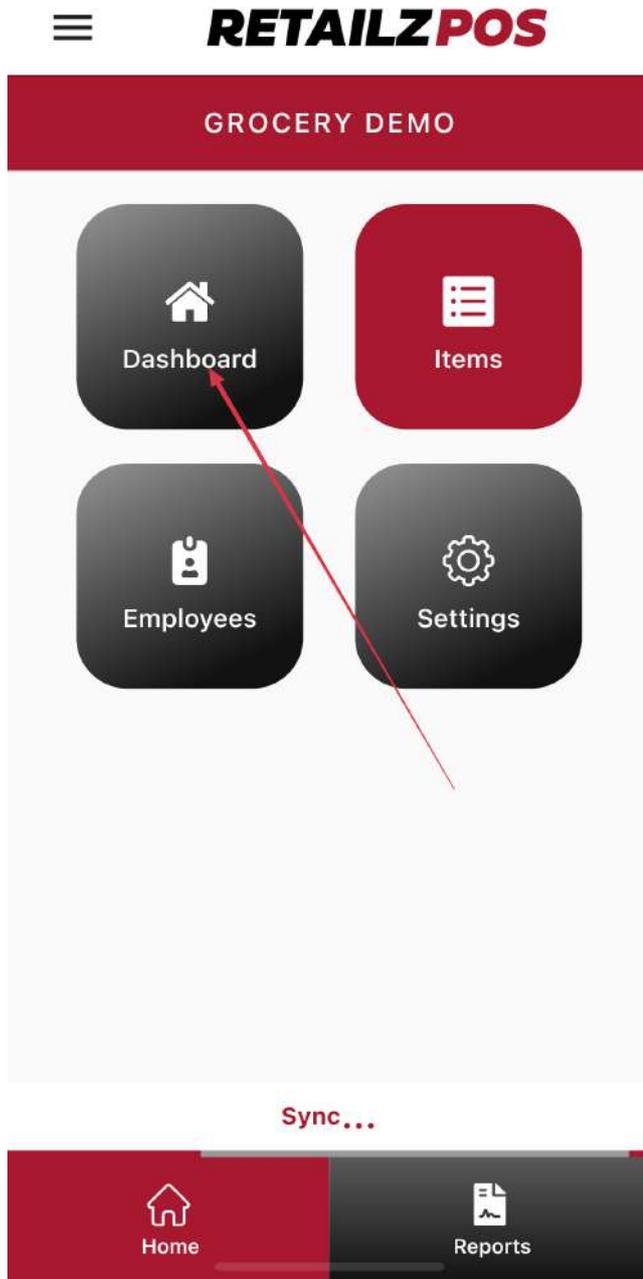
To download and print a receipt from your mobile app, tap Download

The screenshot displays the 'Transactions' screen in the RetailzPOS mobile app. At the top, there is a red header with a back arrow and the text 'Transactions'. Below the header, there is a date range selector set to '01.01.2023 - 31.05.2023'. The main content area shows a list of transactions. The first transaction is for 'John Smith | 27' with a total of '\$ 65.76'. It is a 'CASH' transaction from '13 March 2023, 10:31:AM'. Below the transaction details, there is a 'Download' button with a download icon. A red arrow points from the 'Download' button to the 'Status' field, which is labeled 'Completed'. The bottom navigation bar has two buttons: 'Home' and 'Reports'.

Transaction ID	Amount
Pos OrderId: 60I-20230313103125953	
Sub Total	\$ 61.84
Tax	\$ 3.92
Discount	\$ 0.00
Status	Completed

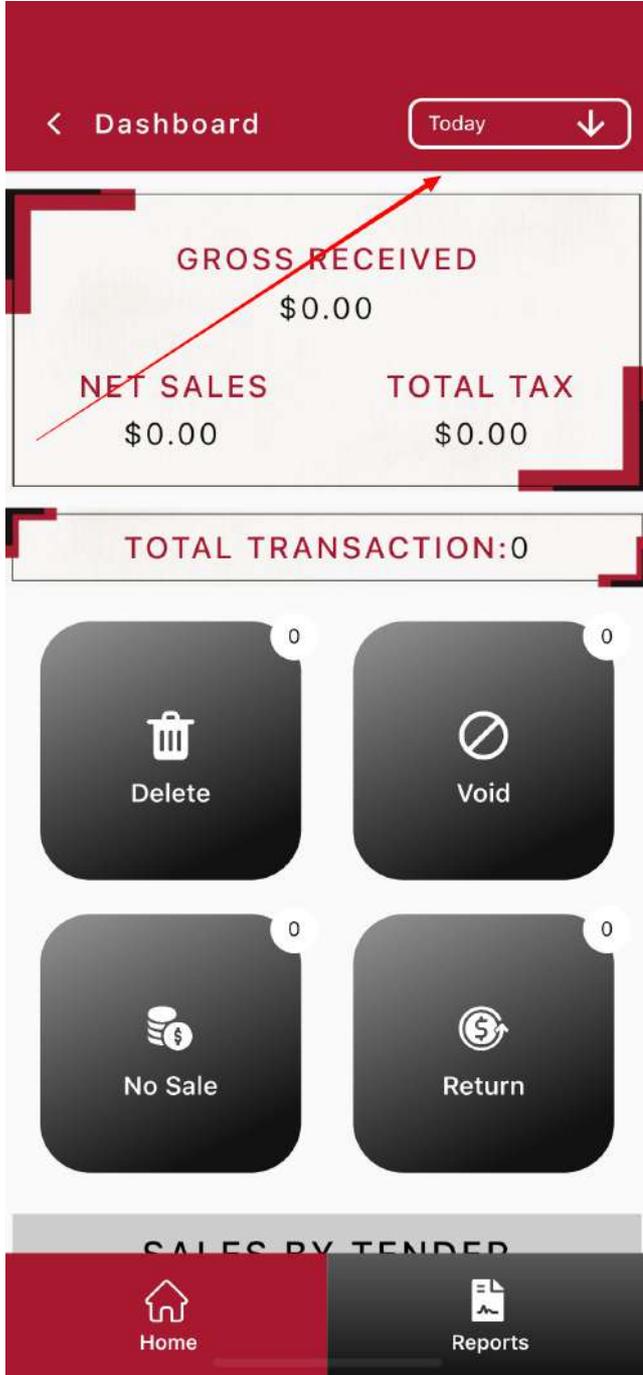
## 4 Mobile App - Access Dashboard Menu

To access your store dashboard, tap Dashboard from the Main Menu



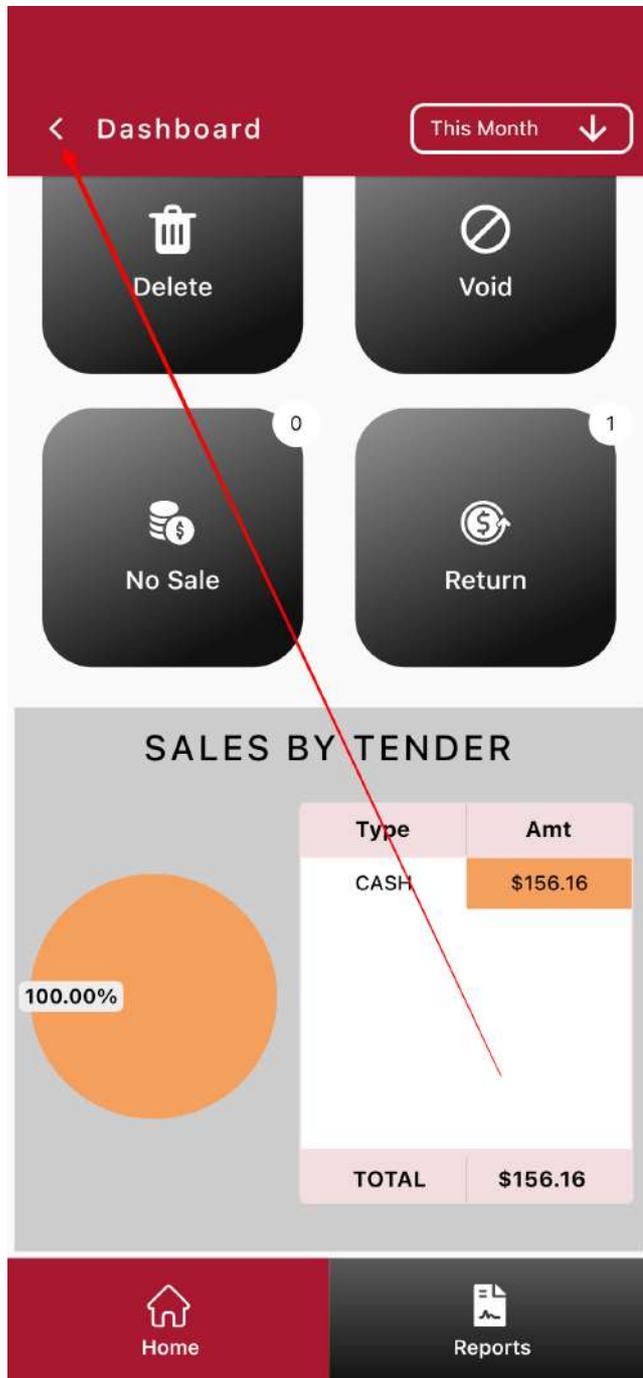
## 4.1 Mobile App - Dashboard Custom Range

To filter your dashboard information, tap the filter date range



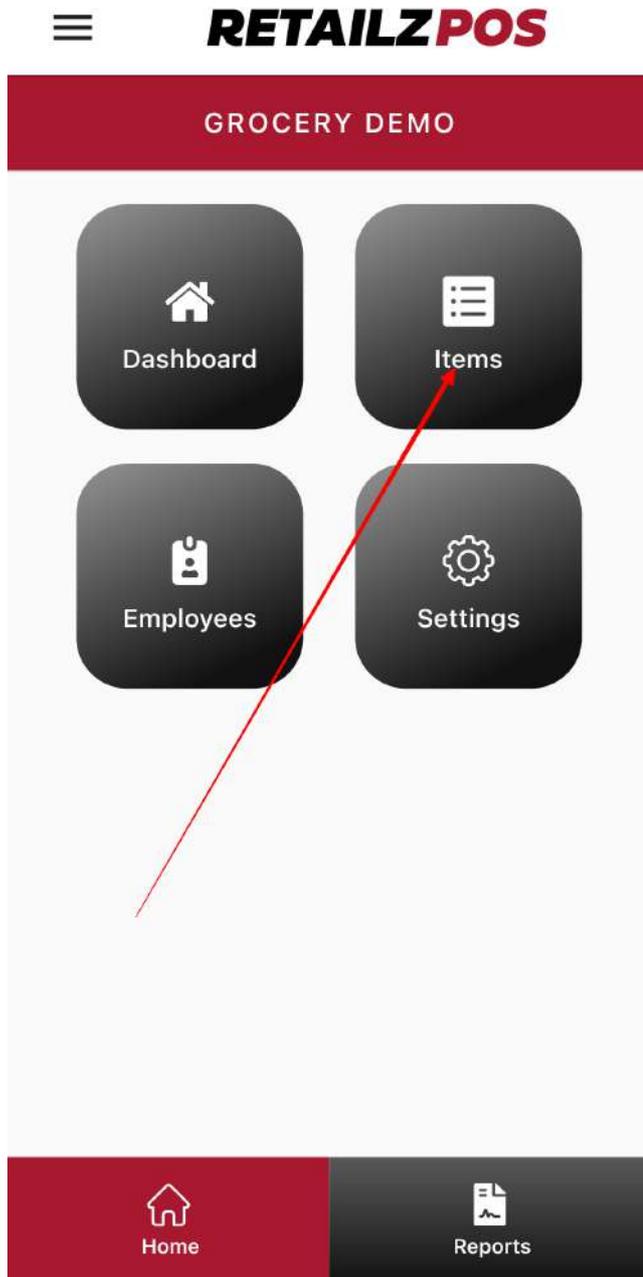
## 4.1.1 Mobile App - Return To Main Menu From Dashboard

To return to the main menu screen, tap the back arrow next to dashboard



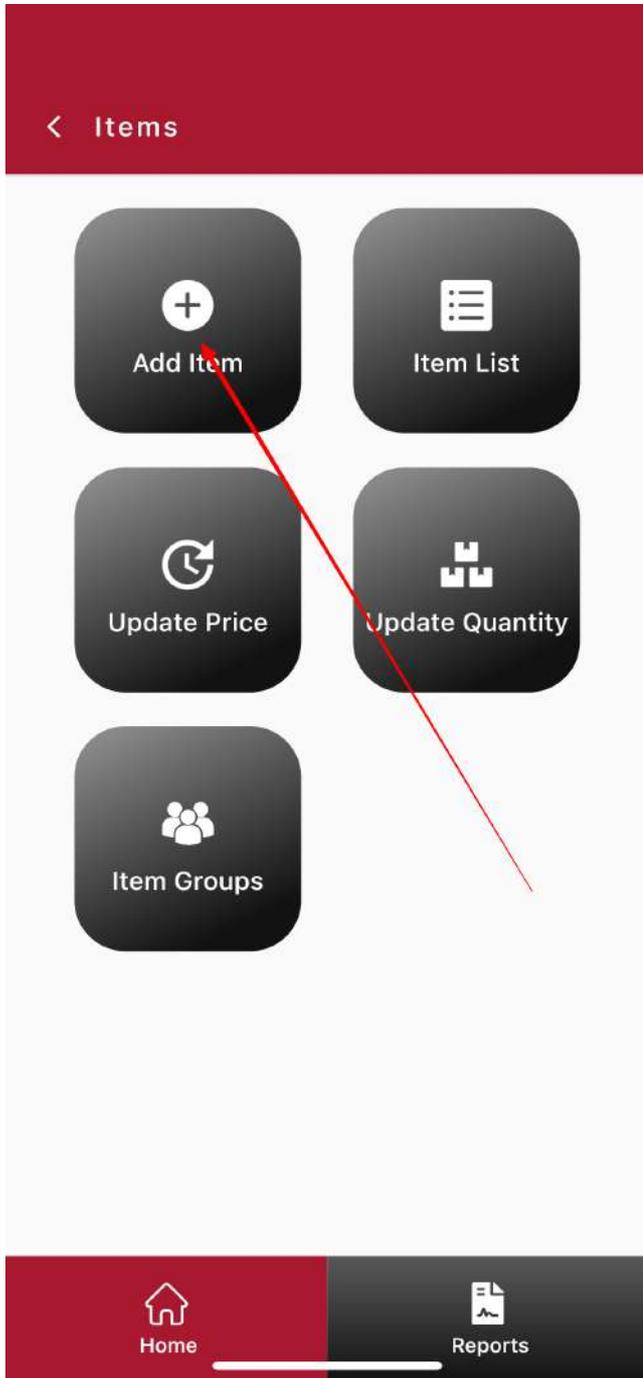
## 5 Mobile App - Access Items Menu

To access all item features, tap Items from the main menu



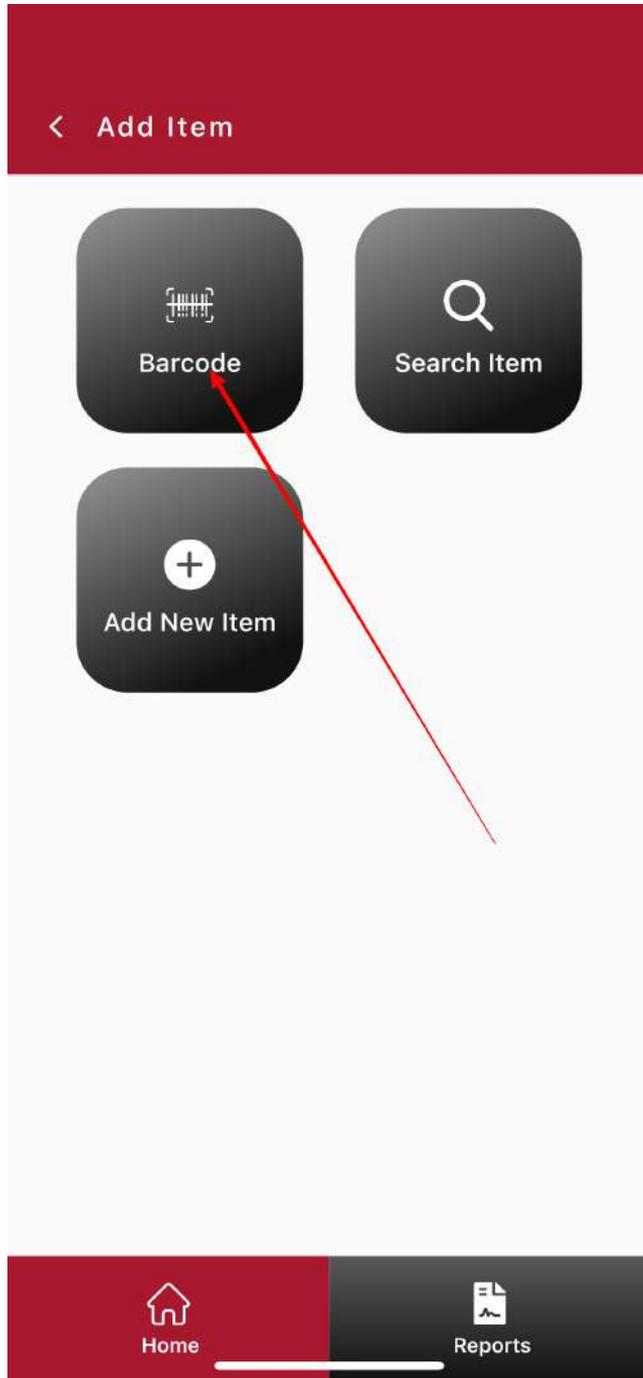
## 5.1 Mobile App - Add Item

To add a new item, tap Add Item



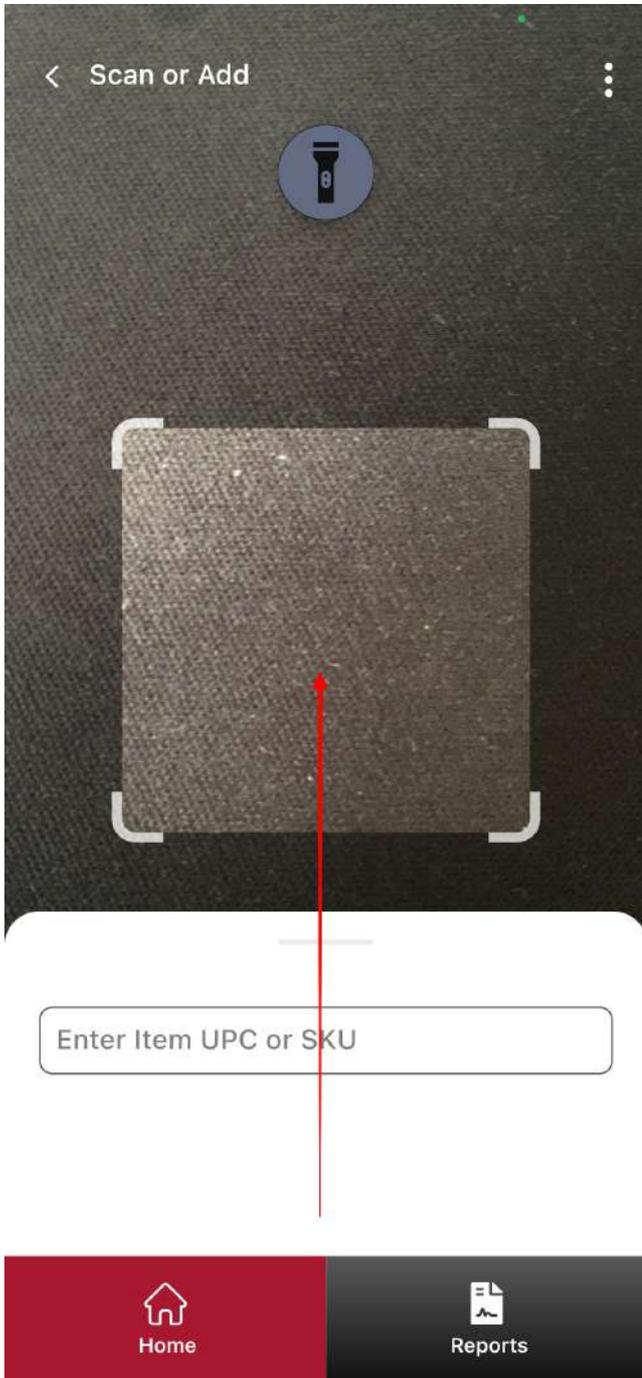
## 5.1.1 Mobile App - Add Item Using Barcode

Tap Barcode to add a new item using your mobile device as a barcode scanner



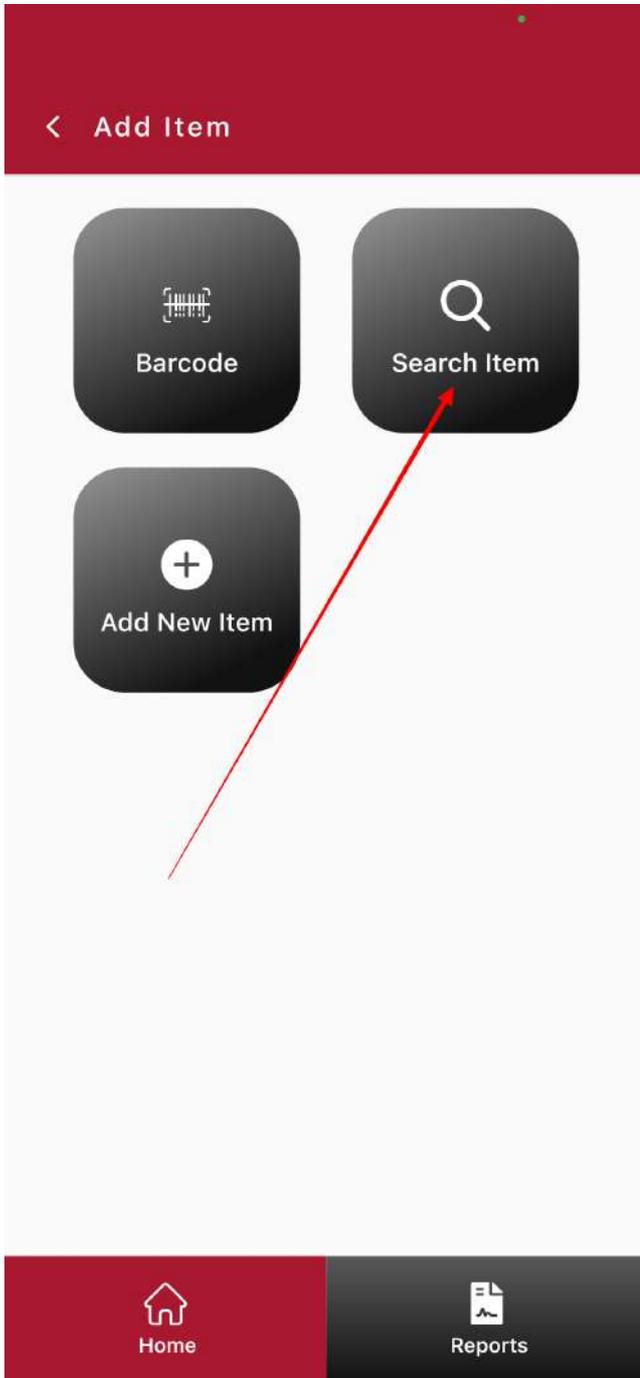
### 5.1.1.1 Mobile App - Barcode Scanner

Place item UPC with the camera box



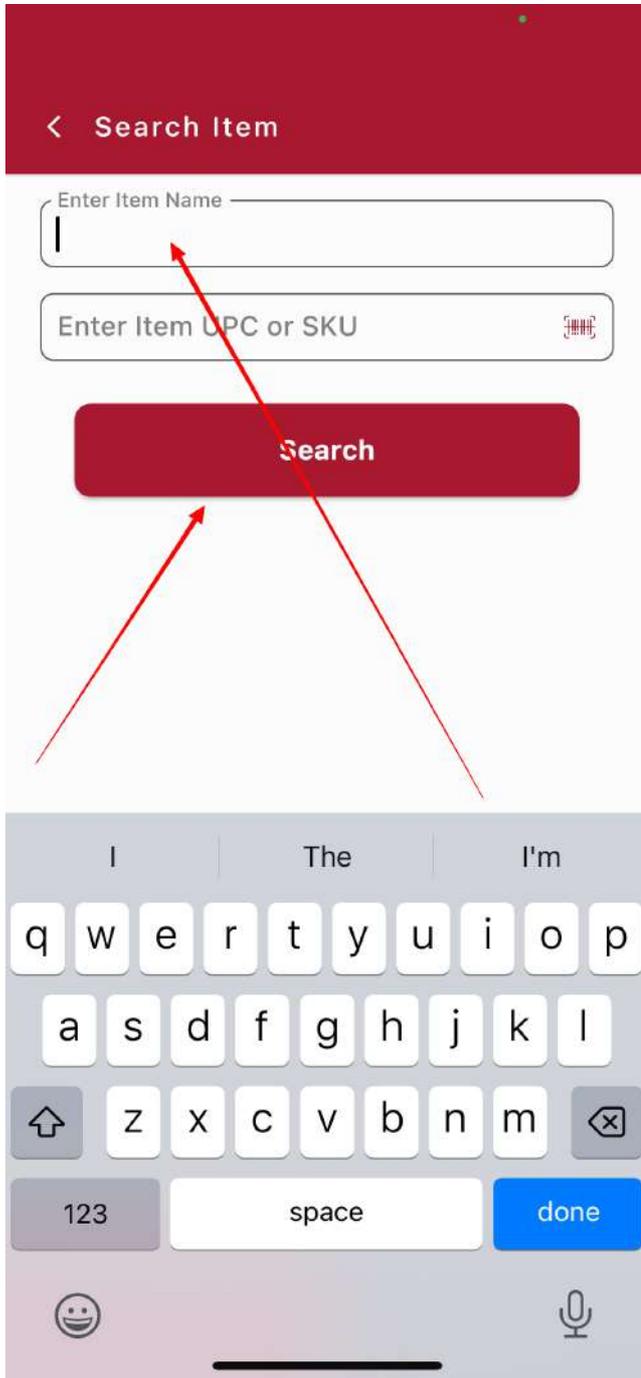
## 5.1.2 Mobile App - Search Item

To search for an item, tap Search Item



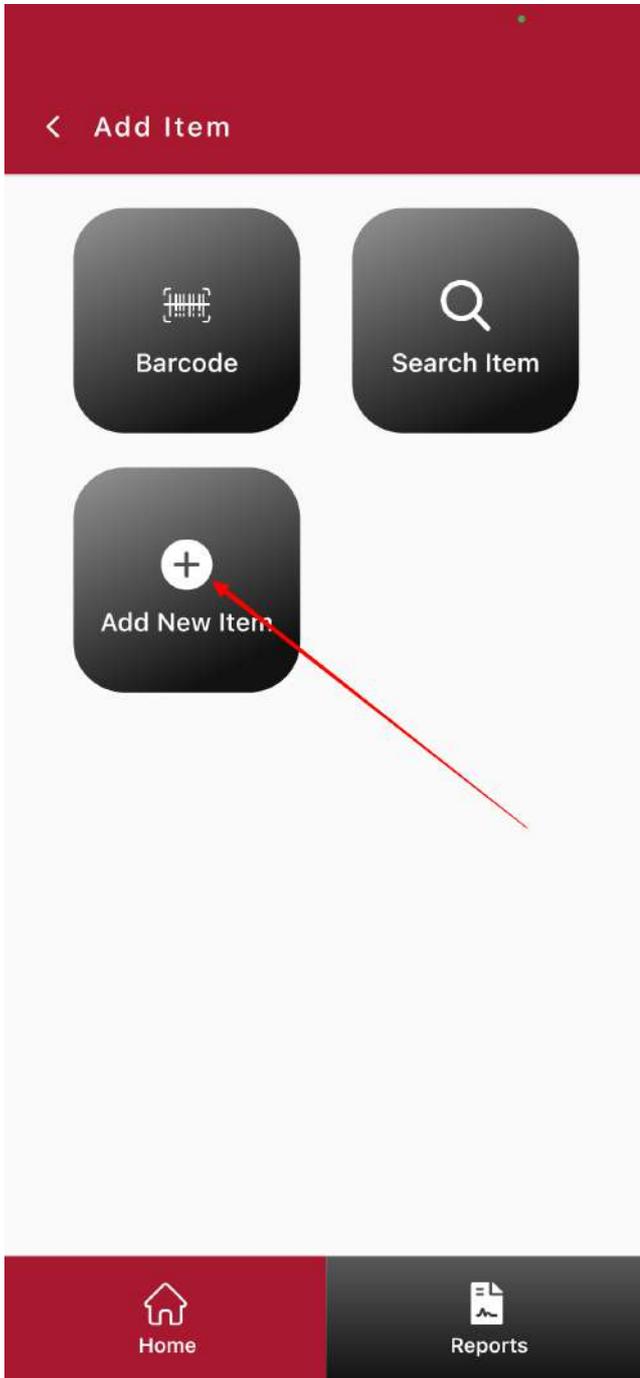
## 5.1.2.1 Mobile App - Item Search Information

Enter Item Name or UPC to search for an item



### 5.1.3 Mobile App - Add New Item

To manually input a new item in your store, tap Add New Item



### 5.1.3.1 Mobile App - New Item Information

Fill out all item information as needed

**Add New Item**

Item SKU

Enter Item UPC **Auto**

Enter Item Name

Department  
Select Department ▼

Category  
Select Category ▼

Sub Category  
Select Sub Category ▼

Size  
Select Size ▼

Pack  
Select Pack ▼

**Prompt for Price**

Unit Cost  Retail Price

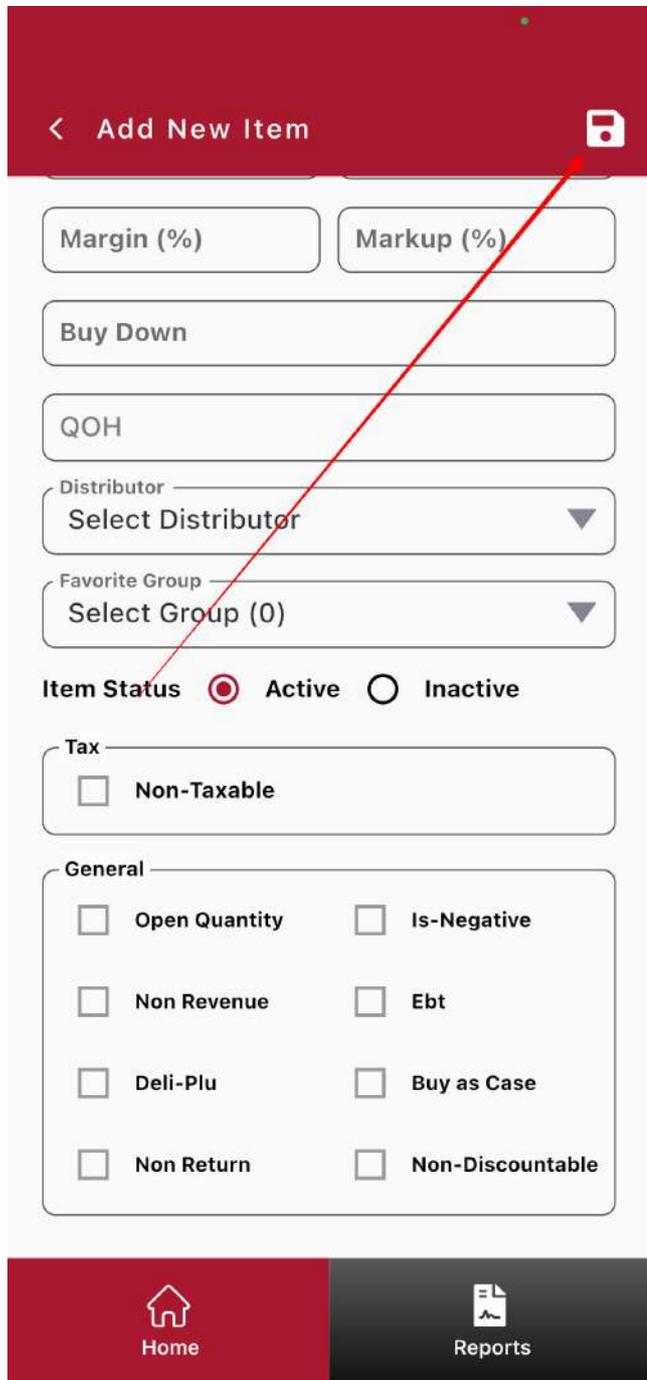
Margin (%)  Markup (%)

Buy Down

Home Reports

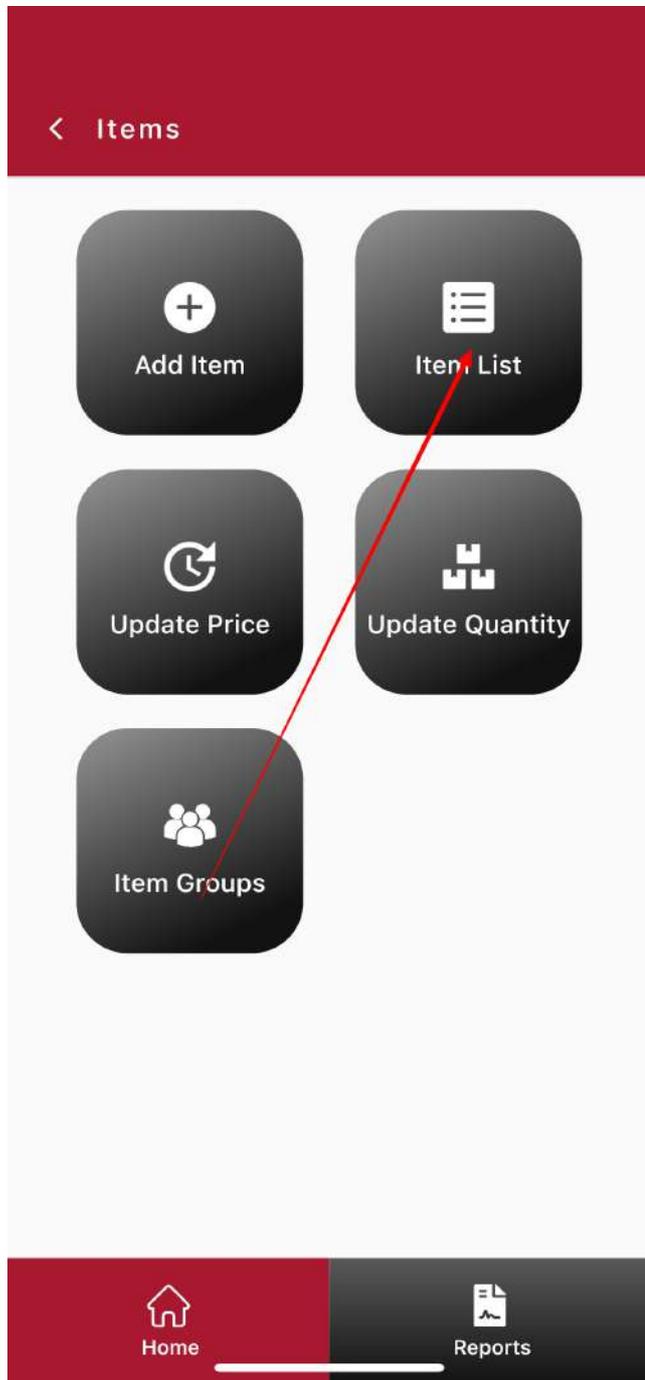
### 5.1.3.2 Mobile App - Save New Item

To save a new item, tap the Save icon at the top right of the screen



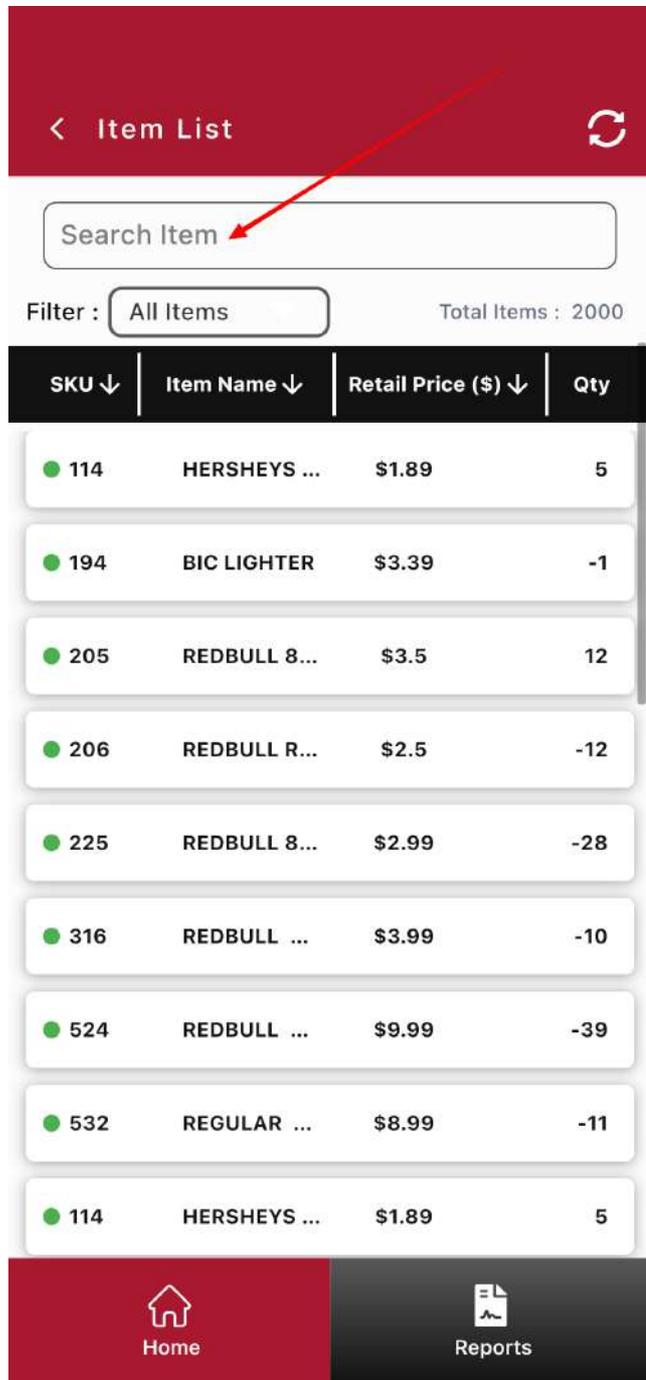
## 5.2 Mobile App - Access Item List

To access your stores item list, tap Item List



## 5.2.1 Mobile App - Item List

Your item list is your entire store database. From here you can search for items and edit them as needed

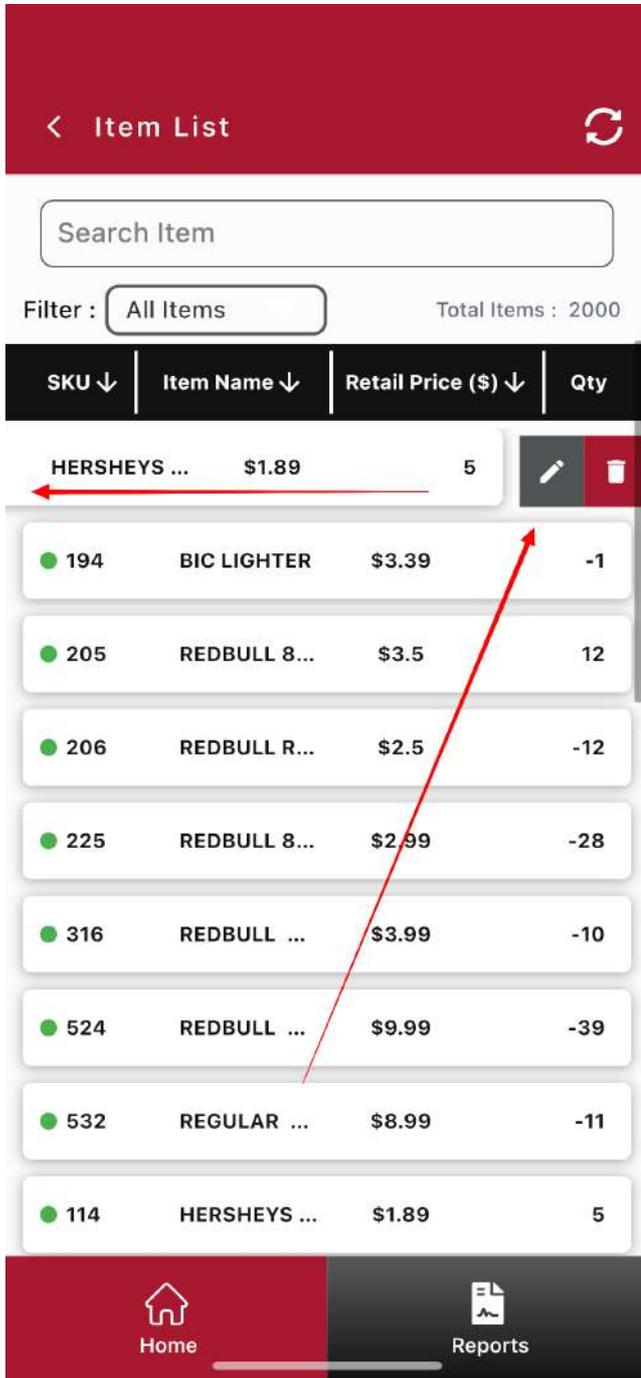


The screenshot displays the 'Item List' screen in the RetailzPOS Mobile App. At the top, there is a red header bar with a back arrow and the text 'Item List', and a refresh icon on the right. Below the header is a search bar labeled 'Search Item' with a red arrow pointing to it. Under the search bar, there is a filter dropdown menu currently set to 'All Items' and a text label 'Total Items : 2000'. The main content area is a table with the following columns: 'SKU ↓', 'Item Name ↓', 'Retail Price (\$) ↓', and 'Qty'. The table contains 10 rows of item data. At the bottom of the screen, there is a navigation bar with two buttons: 'Home' (with a house icon) and 'Reports' (with a document icon).

SKU ↓	Item Name ↓	Retail Price (\$) ↓	Qty
114	HERSHEYS ...	\$1.89	5
194	BIC LIGHTER	\$3.39	-1
205	REDBULL 8...	\$3.5	12
206	REDBULL R...	\$2.5	-12
225	REDBULL 8...	\$2.99	-28
316	REDBULL ...	\$3.99	-10
524	REDBULL ...	\$9.99	-39
532	REGULAR ...	\$8.99	-11
114	HERSHEYS ...	\$1.89	5

## 5.2.2 Mobile App - Edit or Delete Item

To edit an item in your store, swipe left on your screen when hovering your finger over an item name



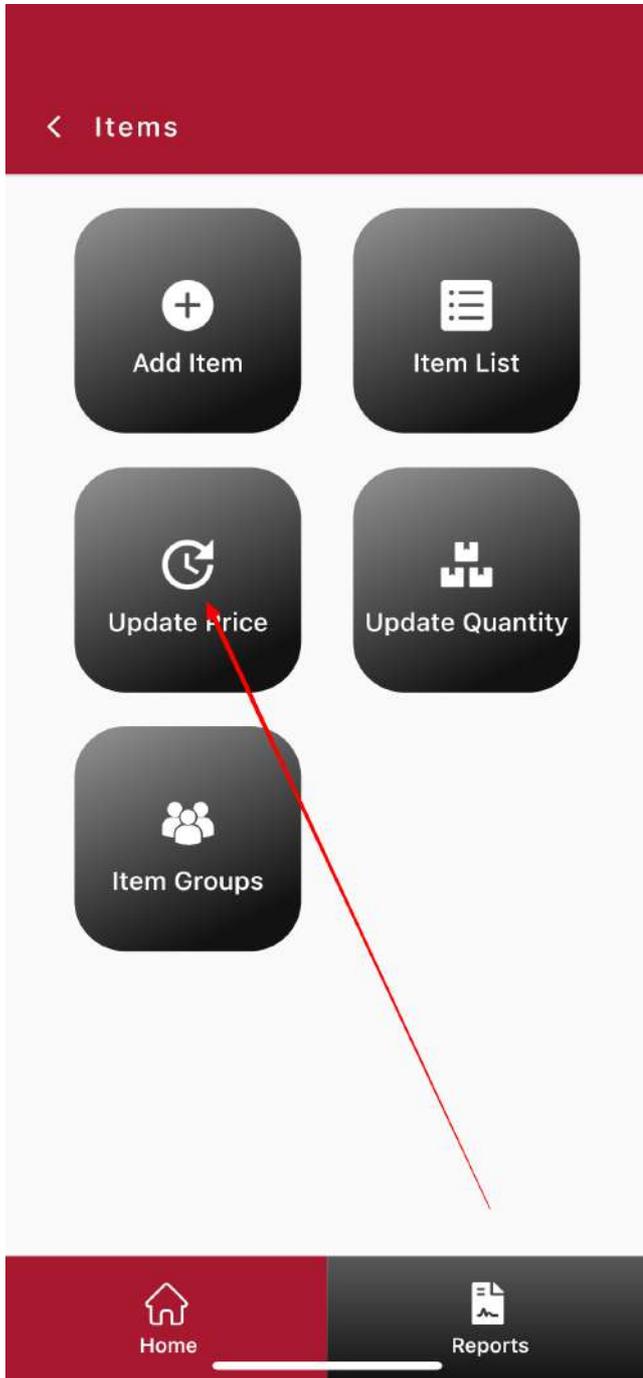
The screenshot displays the 'Item List' screen in the RetailzPOS Mobile App. At the top, there is a red header with a back arrow and the text 'Item List', and a refresh icon. Below the header is a search bar labeled 'Search Item'. A filter dropdown is set to 'All Items', and it indicates 'Total Items : 2000'. The main content is a table with the following columns: 'SKU ↓', 'Item Name ↓', 'Retail Price (\$) ↓', and 'Qty'. The table lists several items, including 'HERSHEYS ...', 'BIC LIGHTER', 'REDBULL 8...', 'REDBULL R...', 'REGULAR ...', and 'HERSHEYS ...'. A red arrow points to the left side of the first item row, indicating a swipe gesture to reveal edit and delete options. Another red arrow points to the edit icon (pencil) in the action menu of the second item row.

SKU ↓	Item Name ↓	Retail Price (\$) ↓	Qty	
HERSHEYS ...		\$1.89	5	 
194	BIC LIGHTER	\$3.39	-1	
205	REDBULL 8...	\$3.5	12	
206	REDBULL R...	\$2.5	-12	
225	REDBULL 8...	\$2.99	-28	
316	REDBULL ...	\$3.99	-10	
524	REDBULL ...	\$9.99	-39	
532	REGULAR ...	\$8.99	-11	
114	HERSHEYS ...	\$1.89	5	

At the bottom of the screen, there is a navigation bar with two icons: 'Home' (house icon) and 'Reports' (document icon).

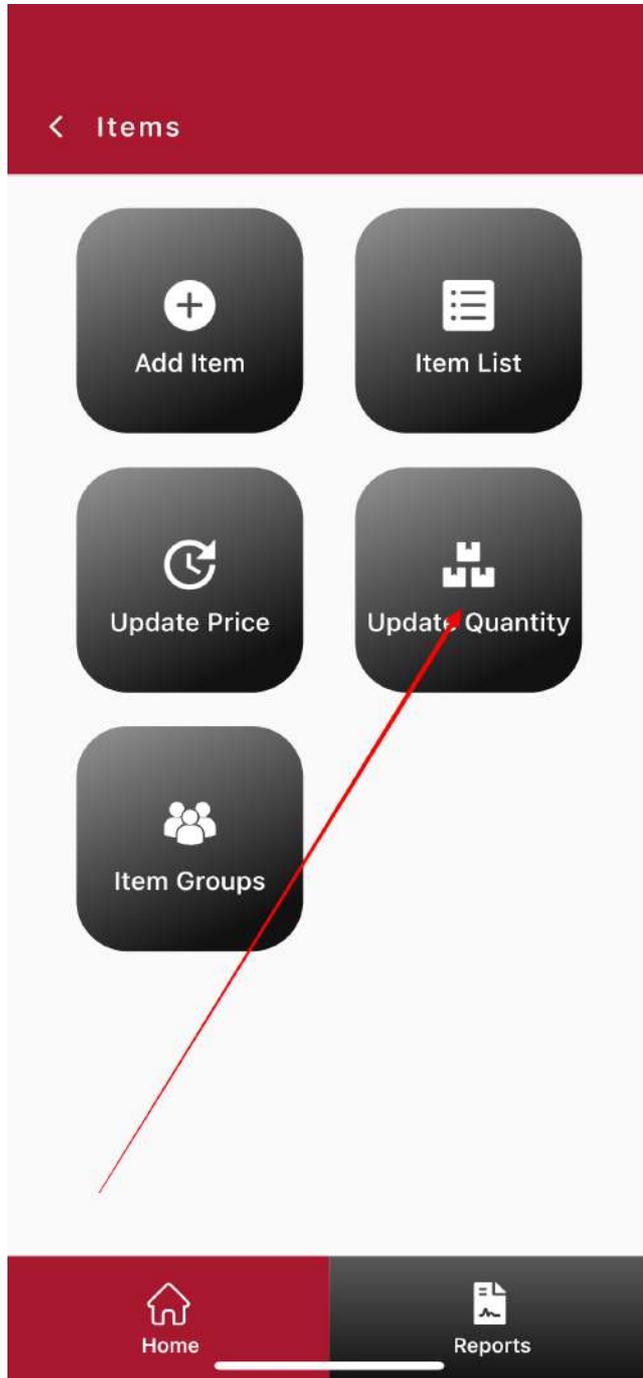
## 5.3 Mobile App - Update Price

To update an items price, tap Update Price



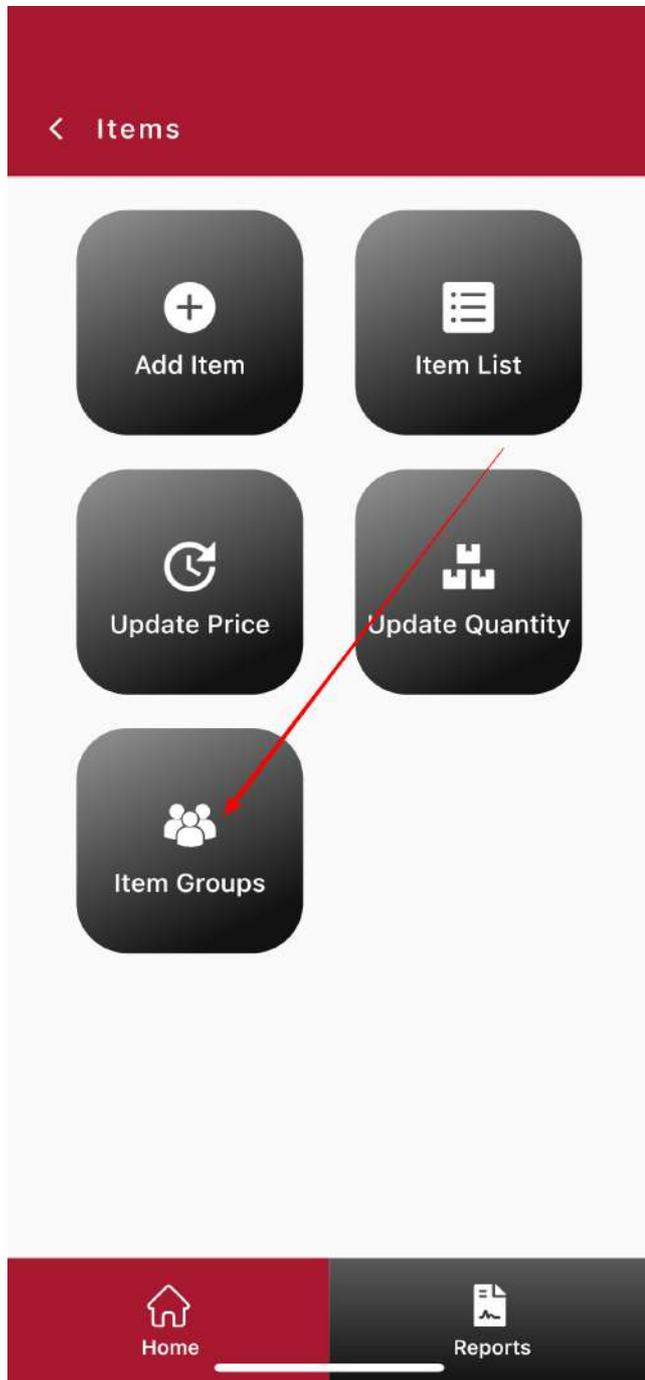
## 5.4 Mobile App - Update Quantity

To update an items quantity in your store, tap Update Quantity



## 5.5 Mobile App - Item Groups

To access your stores item groups, tap Item Groups



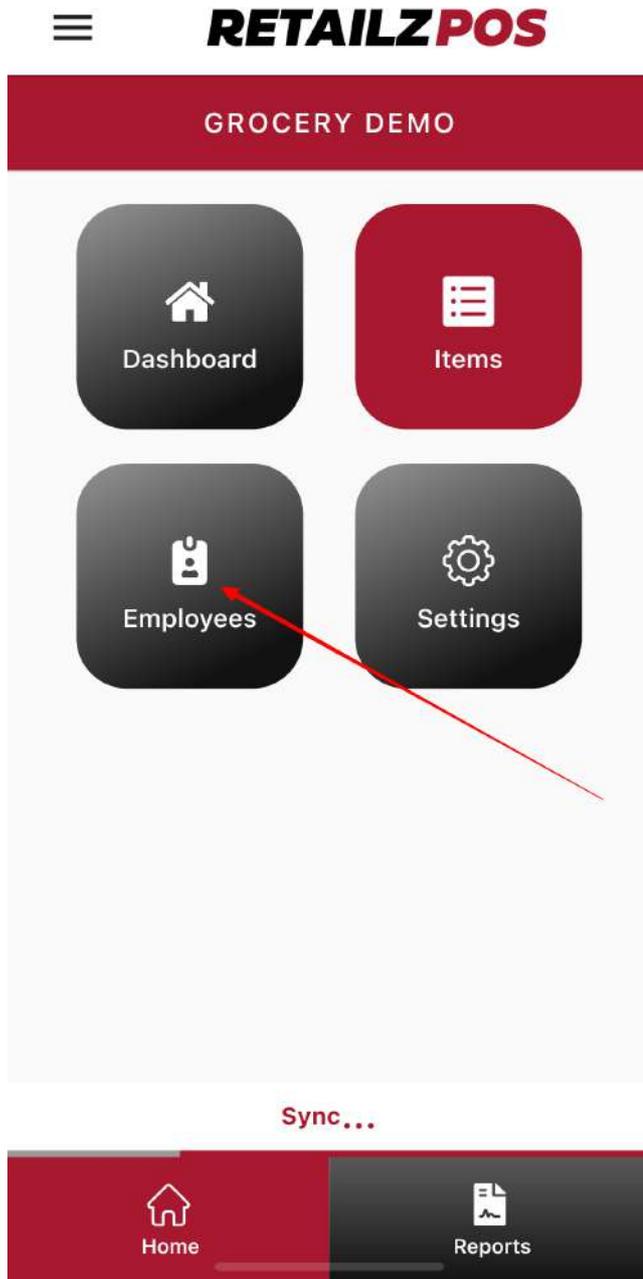
## 5.5.1 Mobile App - Item Group List

From the Item Group list you will be able to add, edit and delete any item groups in your store



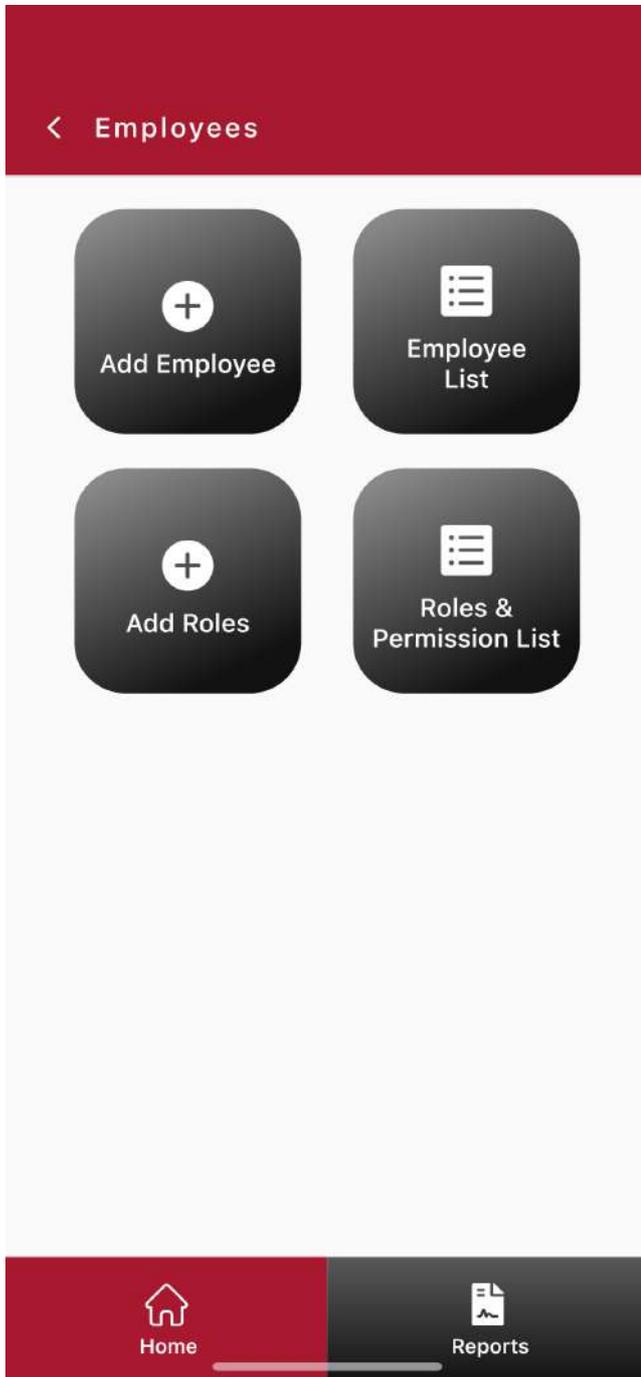
## 6 Mobile App - Access Employees Menu

To access your Employee Menu, tap Employees



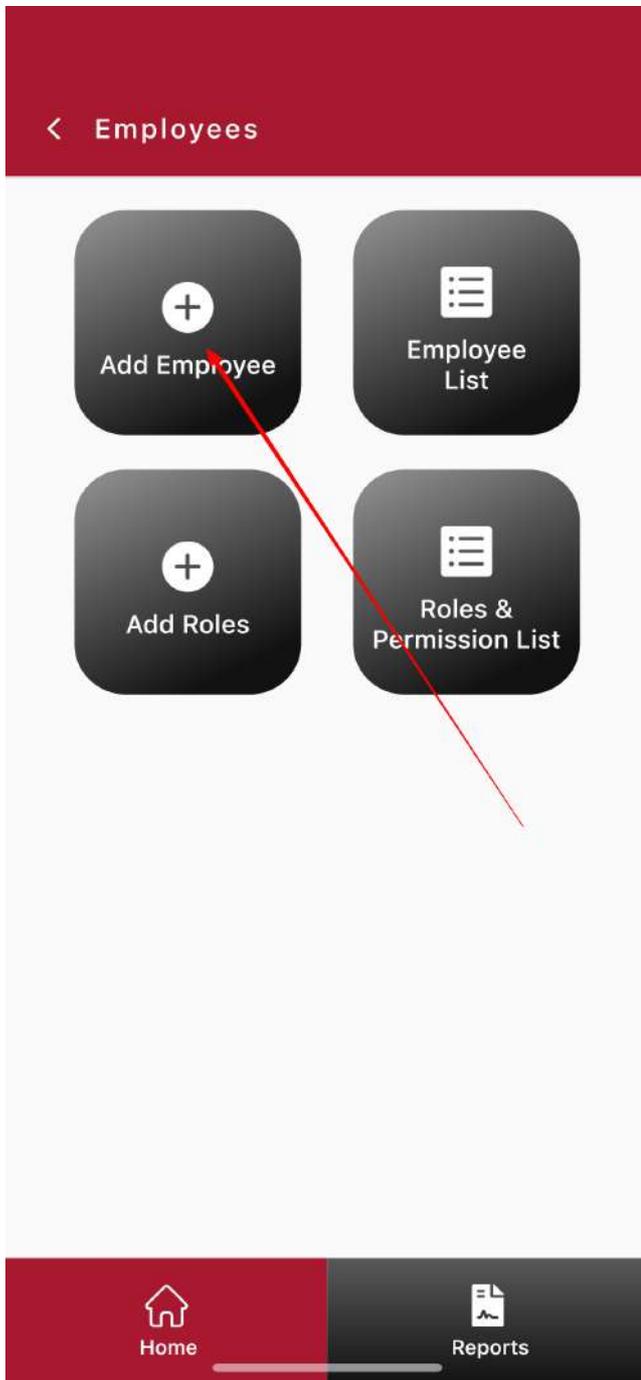
## 6.1 Mobile App - Employee Menu

From the Employee Menu you will have the ability to access features such as Adding Employees; Employee List; Add Roles; and Roles & Permissions List



## 6.2 Mobile App - Add Employee

To add a new employee, tap Add Employee



## 6.2.1 Mobile App - New Employee Information

When inputting a new employee, be sure to fill out all appropriate fields

**Add Employee**

**Personal Information**

First Name \*

Last Name \*

Email

Home Number

Mobile No \*

Birthdate

Gender \*  Male  Female

**Location Detail**

Address1

Address2

Zip Code

Home Reports

## 6.2.2 Mobile App - Apply Employee Pin, Role and Password

Provide all employees with their own personal Pin and Password. Make sure to select the correct role for each employee in your store

**Others**

Access Pin \*

Re-enter Access Pin \*

Join Date \*

Payroll Amount

Select Role \*

Select Payroll Type

Select Language

**Password Details**

Password \*

Re-enter Password \*

Home Reports

## 6.2.3 Mobile App - Save Employee

Tap the save button at the top right of the screen to save your new employee to your store

**Add Employee** 

**Location Detail**

Address1

Address2

Zip Code

City

State

Select Country ▼

**Others**

Access Pin \*

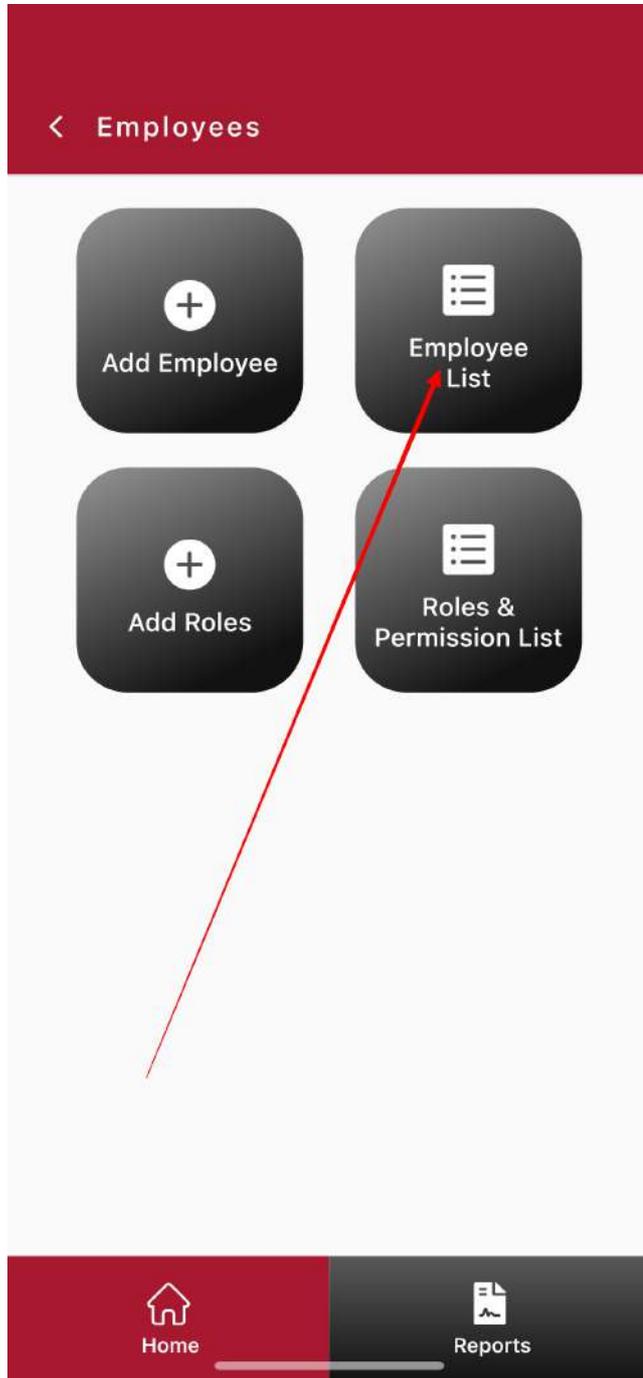
Re-enter Access Pin \*

Join Date \* 

 Home  Reports

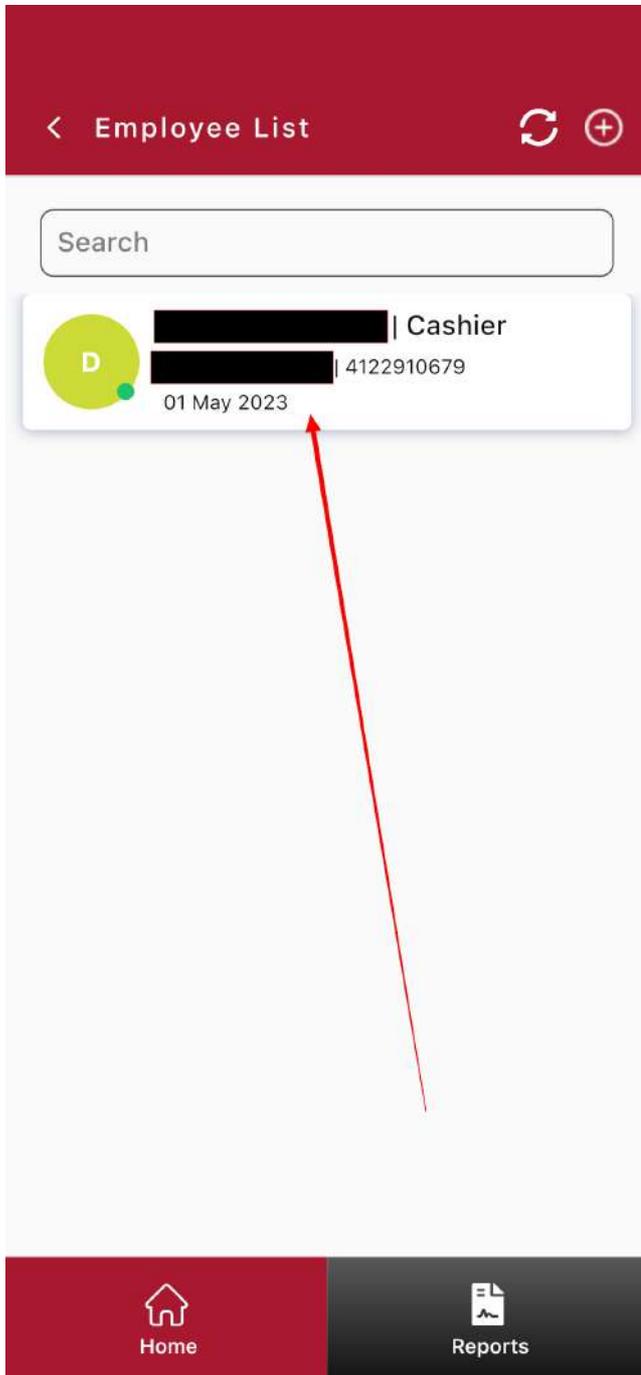
## 6.3 Mobile App - Employee List

To access your employee list, tap Employee List



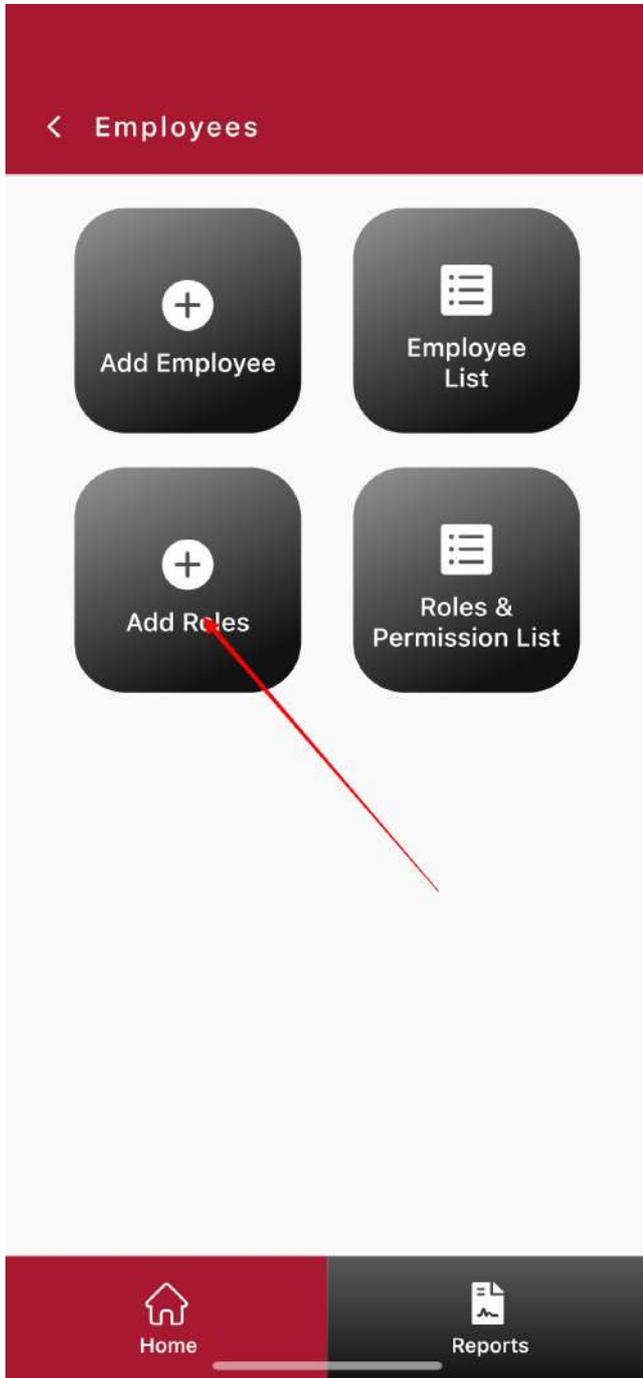
## 6.3.1 Mobile App - Employee List Menu

From your employee list you will be able to view all employees in your store as well as add, edit or delete employees



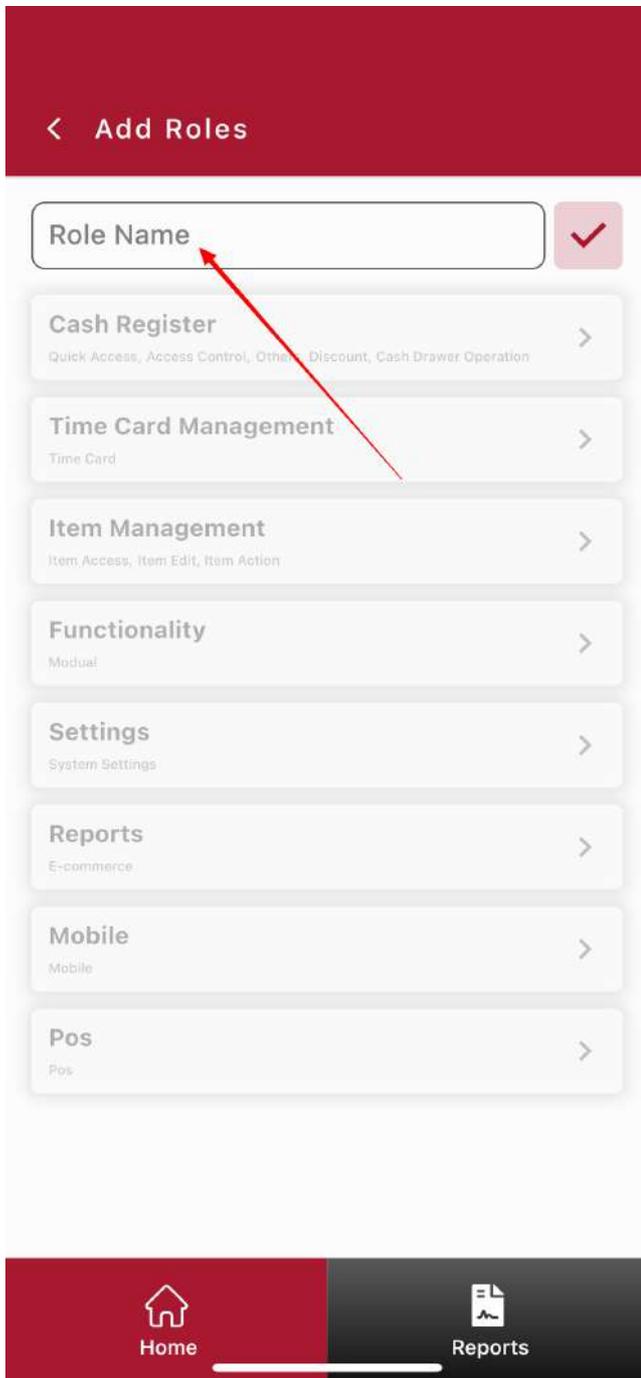
## 6.4 Mobile App - Add Roles

To add a new employee role to your store, tap Add Roles



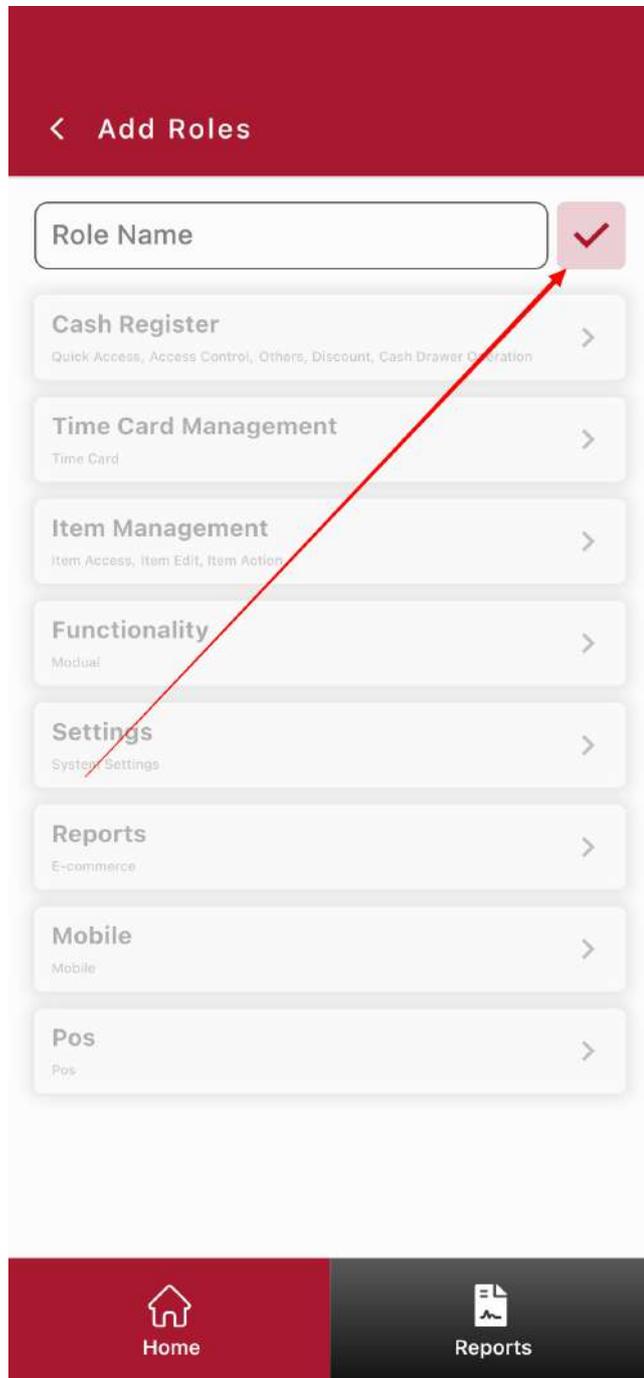
## 6.4.1 Mobile App - Role Name

When creating a new role, provide the appropriate Role Name



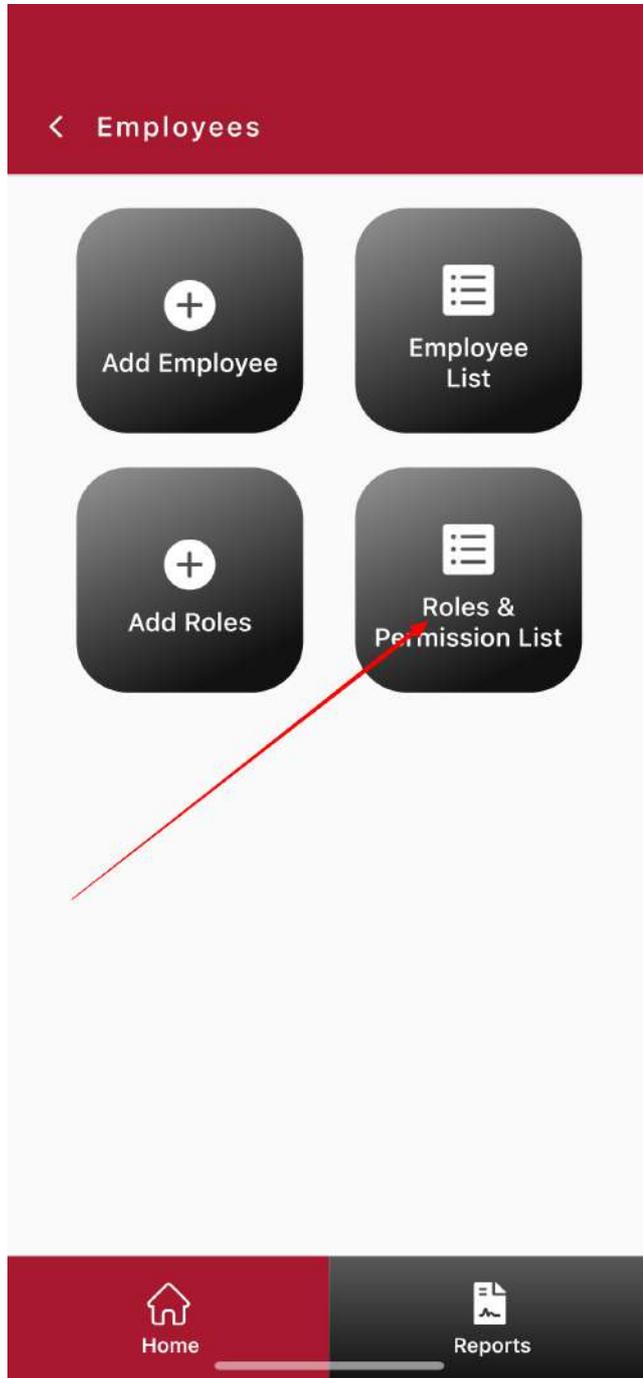
## 6.4.2 Mobile App - Save Role

To save a new role, tap the Checkmark next to Role Name



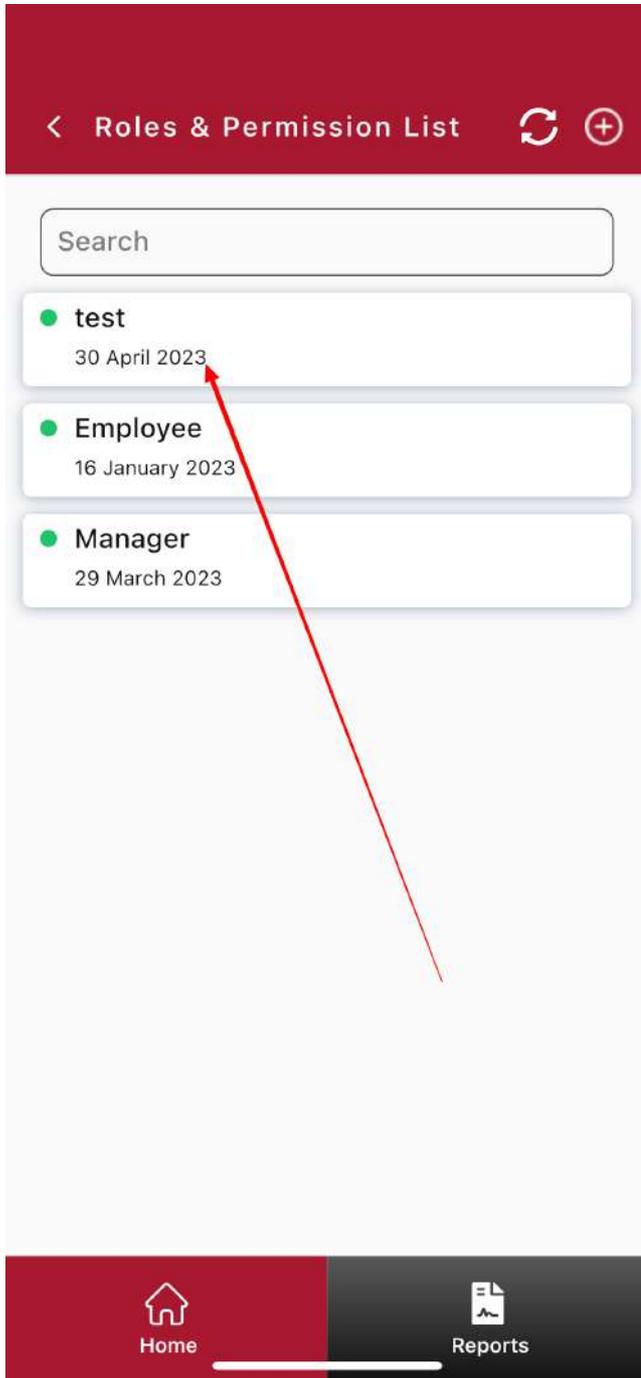
## 6.5 Mobile App - Roles & Permission List

To access your store roles and permissions list, tap Roles & Permissions List



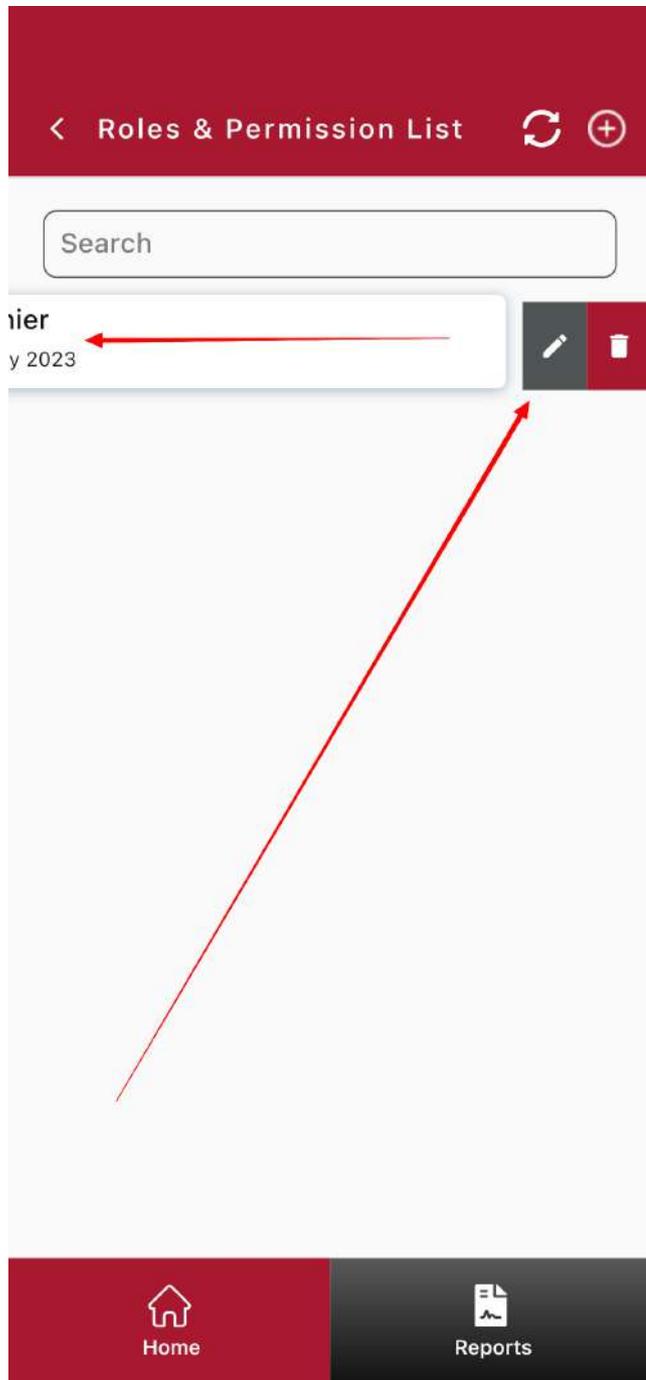
## 6.5.1 Mobile App - Role & Permissions Menu

From the Role & Permissions Menu you will be able to see all roles created in your store



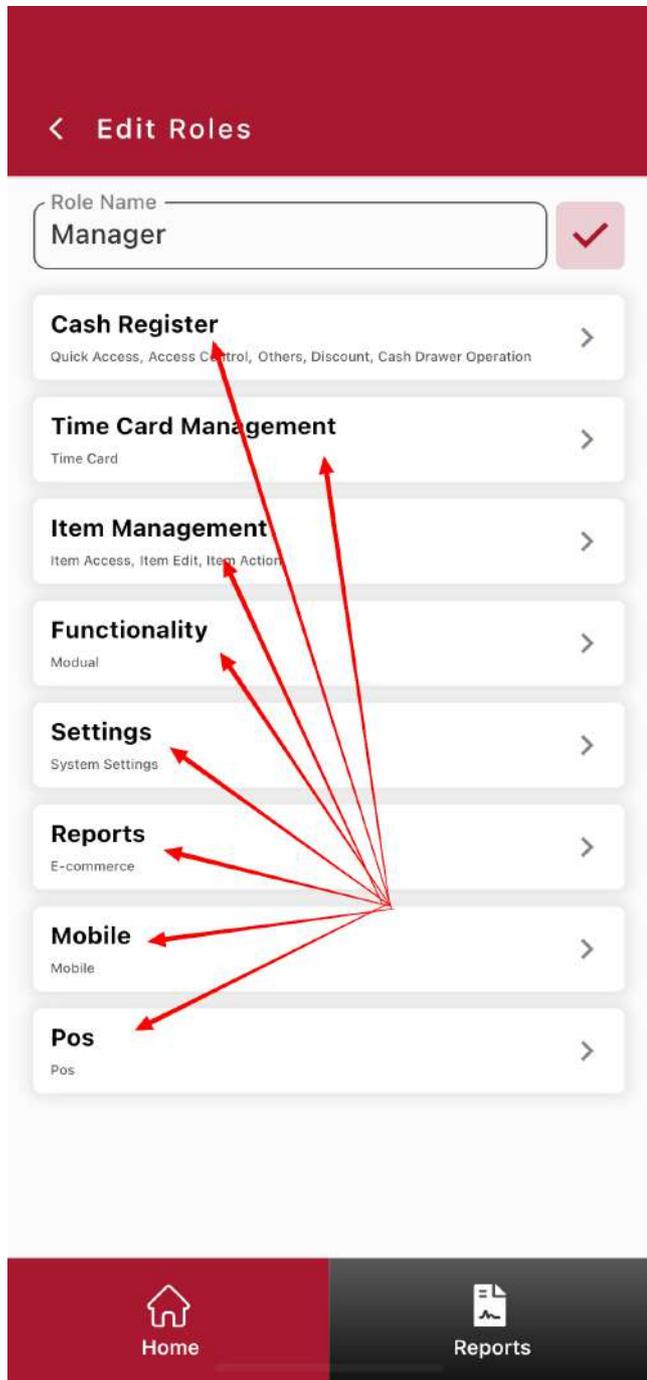
## 6.5.2 Mobile App - Edit or Delete Role & Permissions

To edit a role's permissions, swipe left with your finger while hovering over the role then tap the edit button



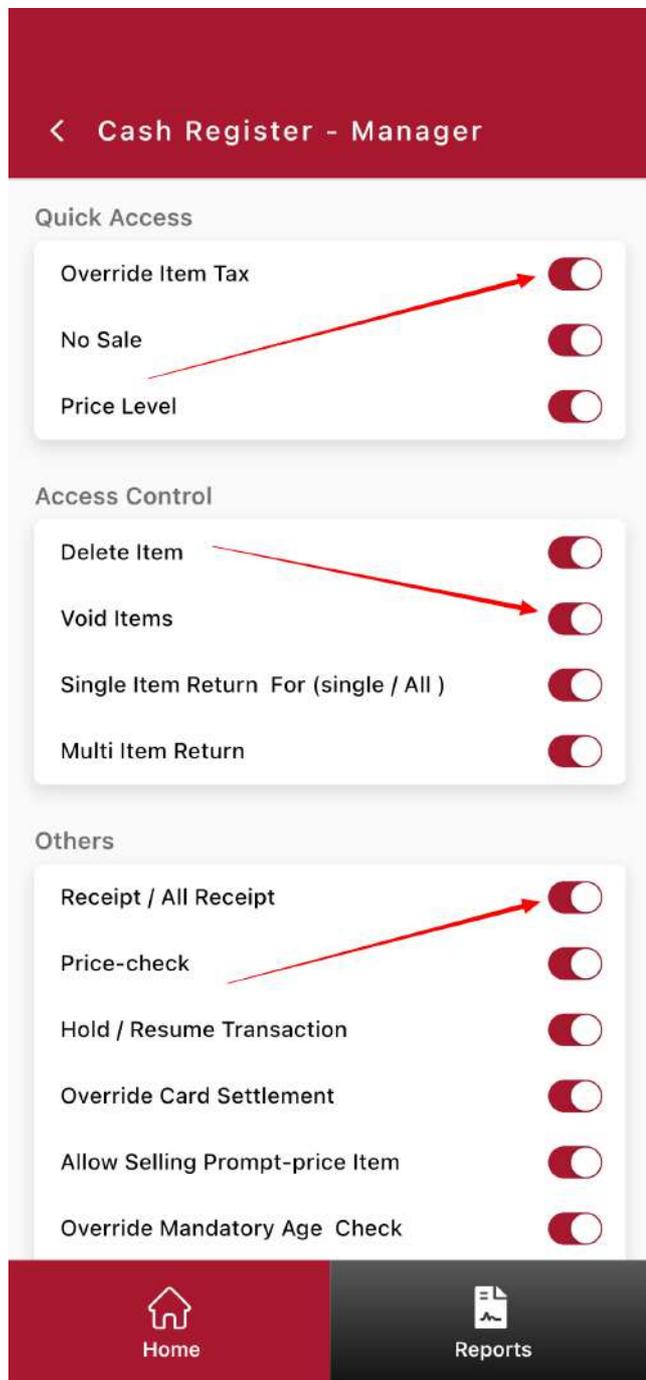
### 6.5.3 Mobile App - Permissions List

From your roles permissions list, select the category you wish to edit

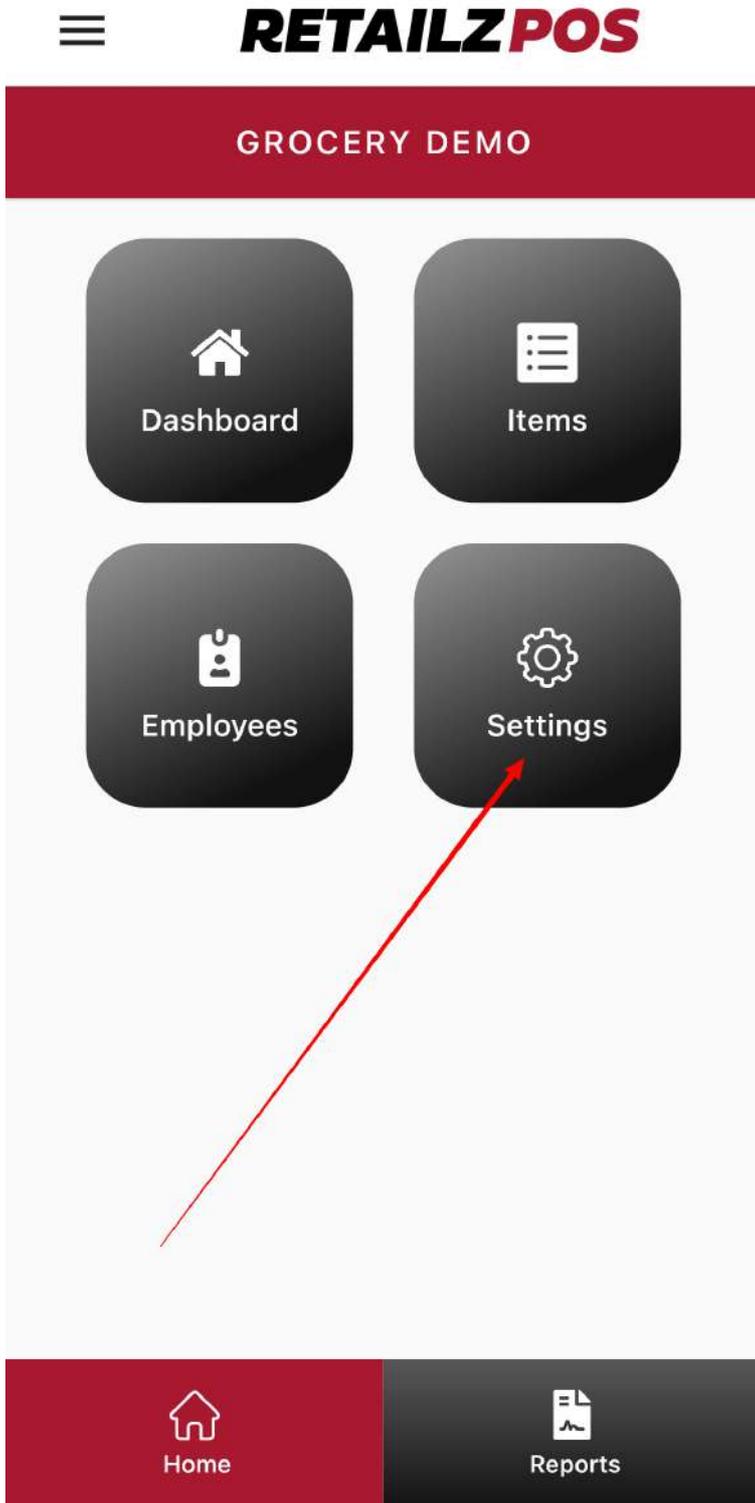


## 6.5.4 Mobile App - Permissions Selection

Tap the permissions you wish to turn on and off for your role

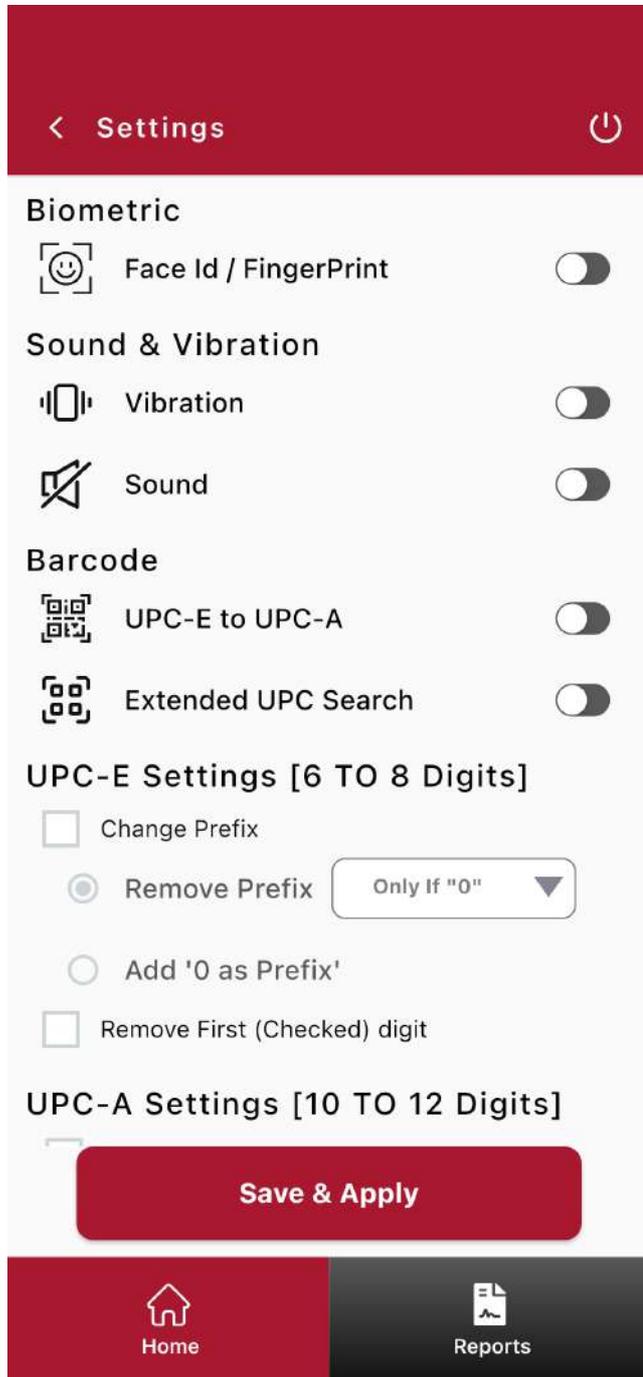


## 7 Mobile App - Access Settings Menu



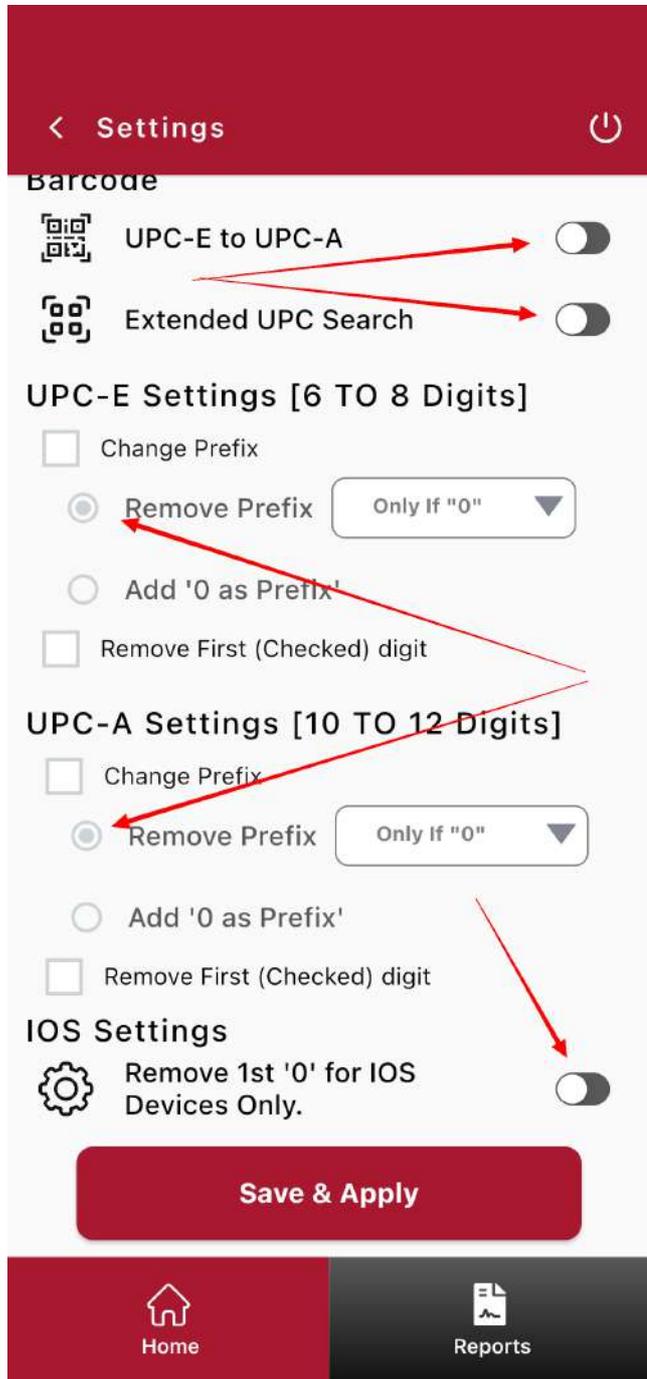
## 7.1 Mobile App - Settings Menu

From the settings menu you can access features such as barcode settings, sound, and face/fingerprint identification



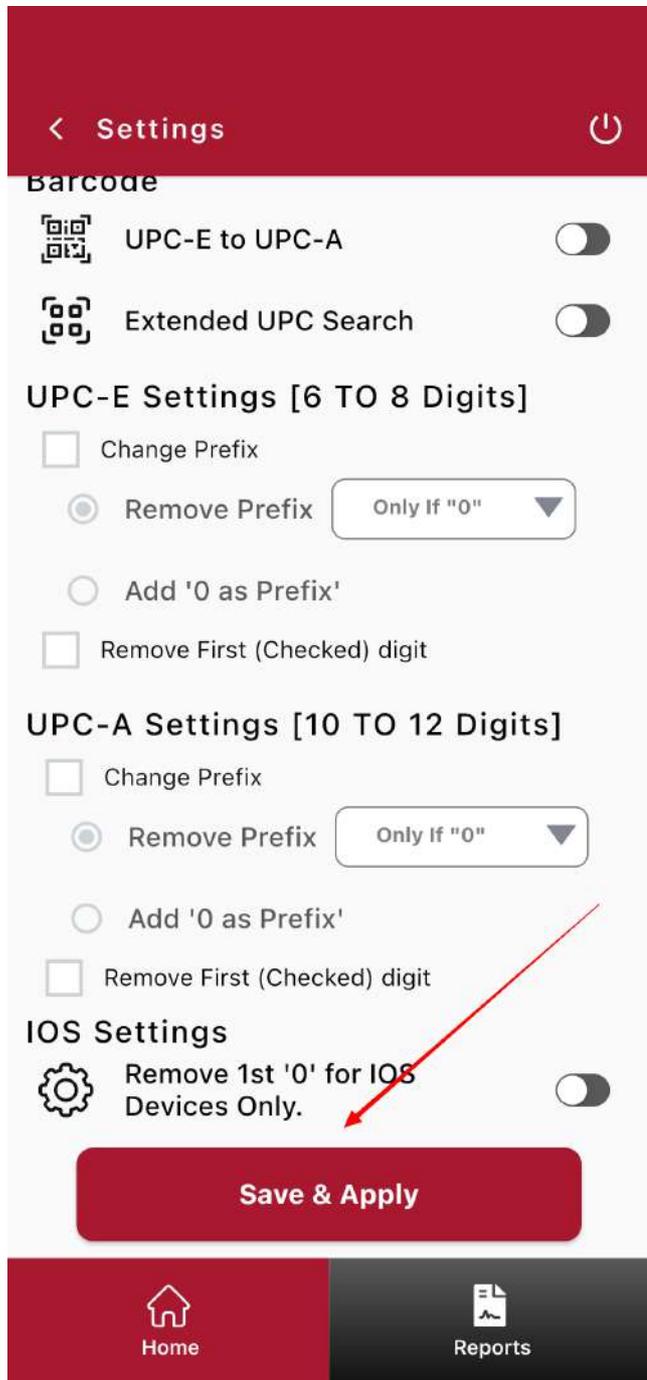
## 7.1.1 Mobile App - Barcode Scanner Settings

Always be sure to match your barcode scanner settings to the same settings as your cash register. For iPhone users make sure to check off the IOS setting at the bottom



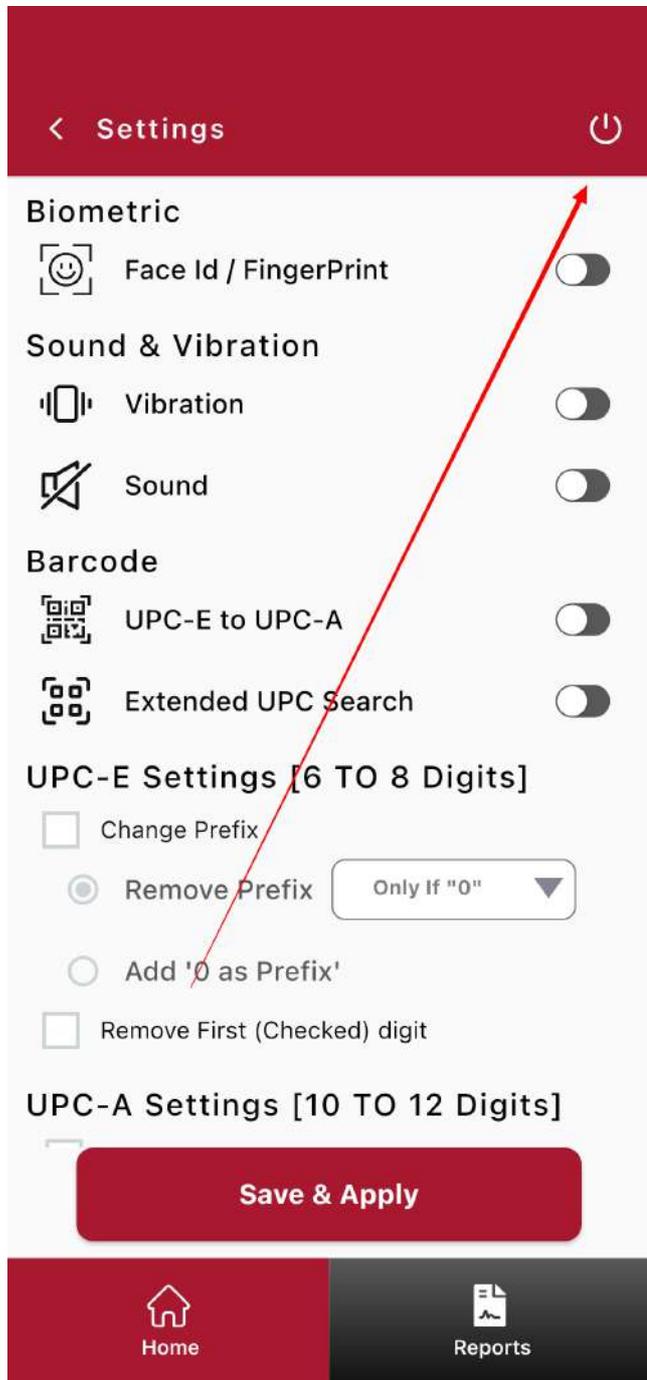
## 7.1.2 Mobile App - Save & Apply Settings

Tap Save & Apply to save your settings



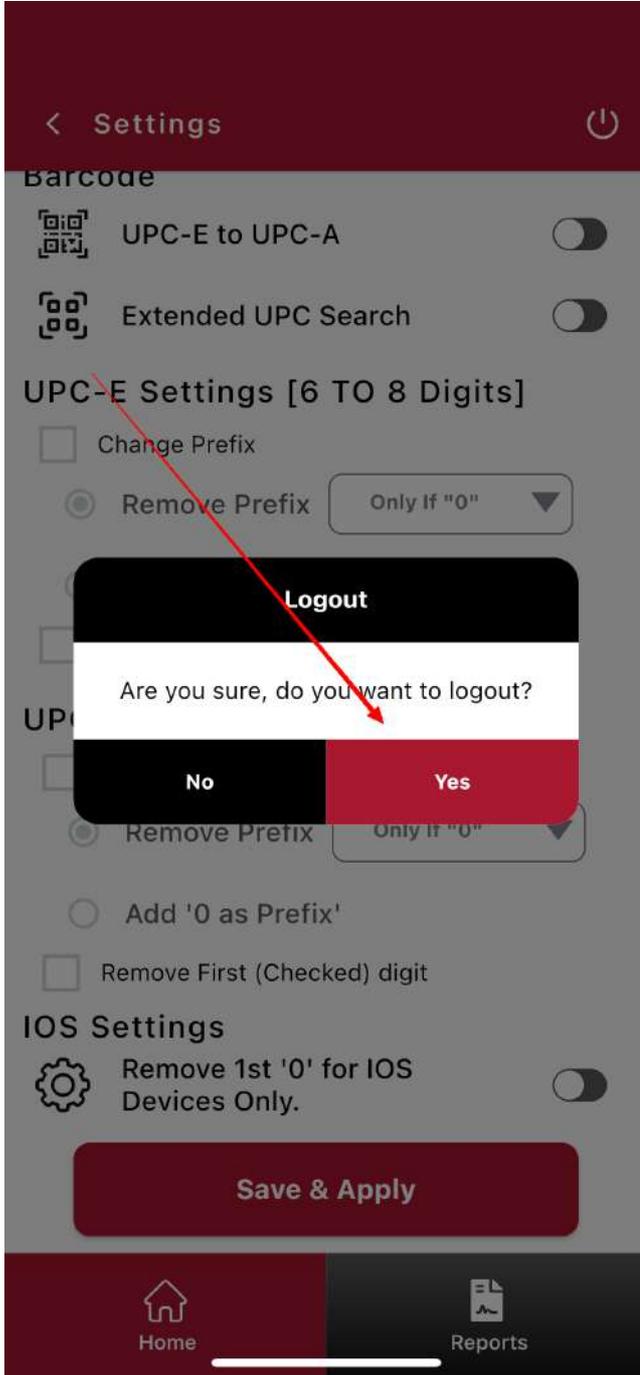
## 7.2 Mobile App - Log Out

To logout of your store, tap the power icon at the top right corner of the screen



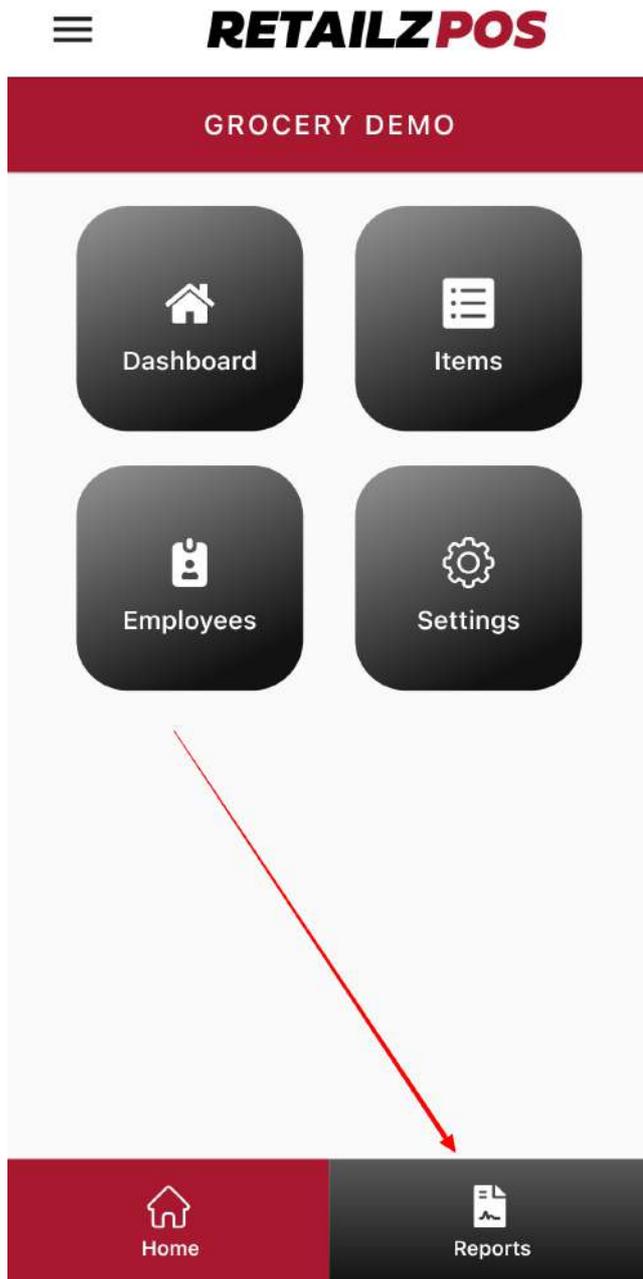
## 7.2.1 Mobile App - Confirm Logout

To confirm logging out of your store, tap Yes



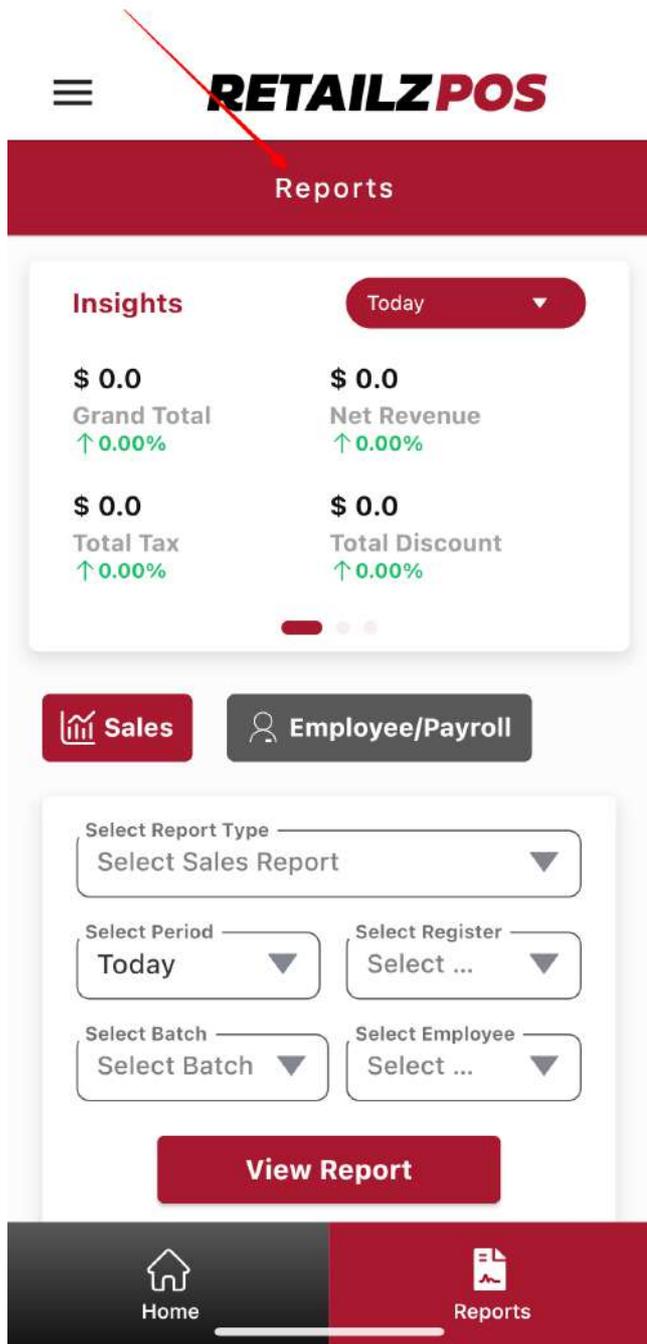
## 8 Mobile App - Access Reports Menu

To access your store reports, tap Reports from the Main Menu Screen



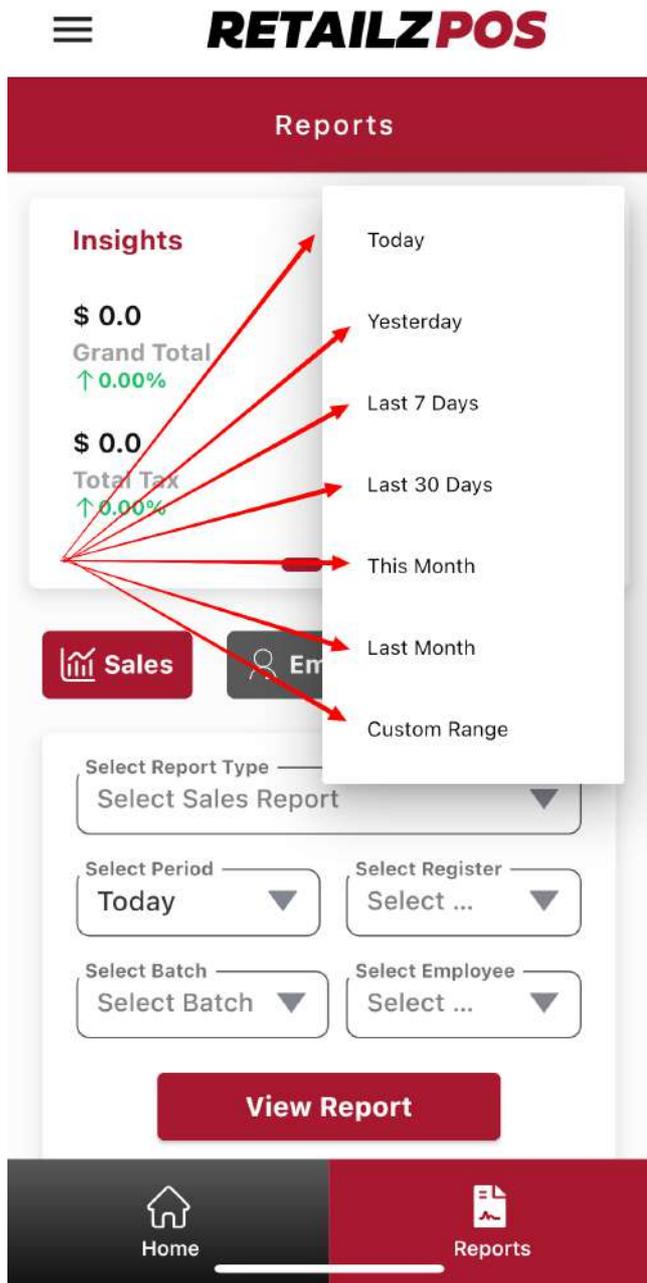
## 8.1 Mobile App - Reports Menu

From your reports menu you will be able to access a list of different reports of your store



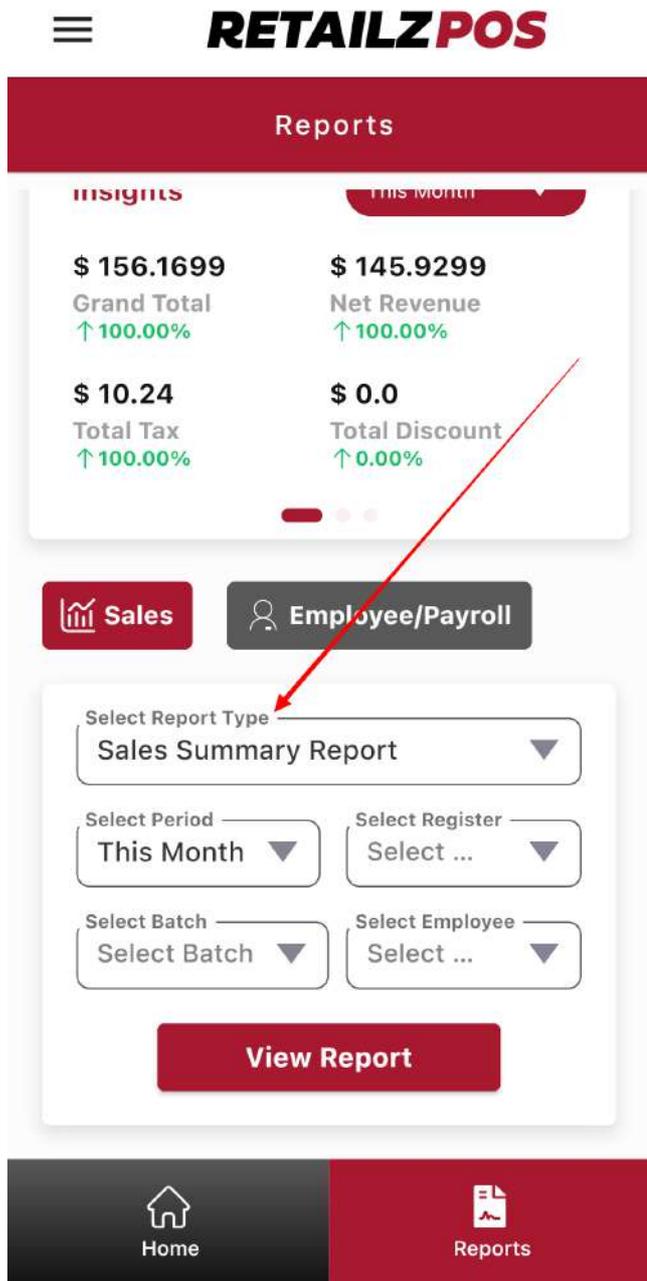
## 8.1.1 Mobile App - Filter Report Date Range

Filter your reports by specific date range



## 8.1.2 Mobile App - Filter Report Type

Select which type of report you want to view in your store





## 8.1.4 Mobile App - Report Breakdown

All reports will be broken down into different lists

< Sales Summary Report

### Tender Payment Summary

CASH(+)	\$ 156.16
CHECK(+)	\$ 0.00
CREDIT(+)	\$ 0.00
DEBIT(+)	\$ 0.00
EBT(+)	\$ 0.00
EBTCASH(+)	\$ 0.00
HOUSEACCOUNT(+)	\$ 0.00
<b>GRAND TOTAL</b>	<b>\$156.16</b>
TOTAL CASH	\$156.16
TOTAL CARD	\$0.00
TOTAL EBT	\$0.00

### Cash Deposit

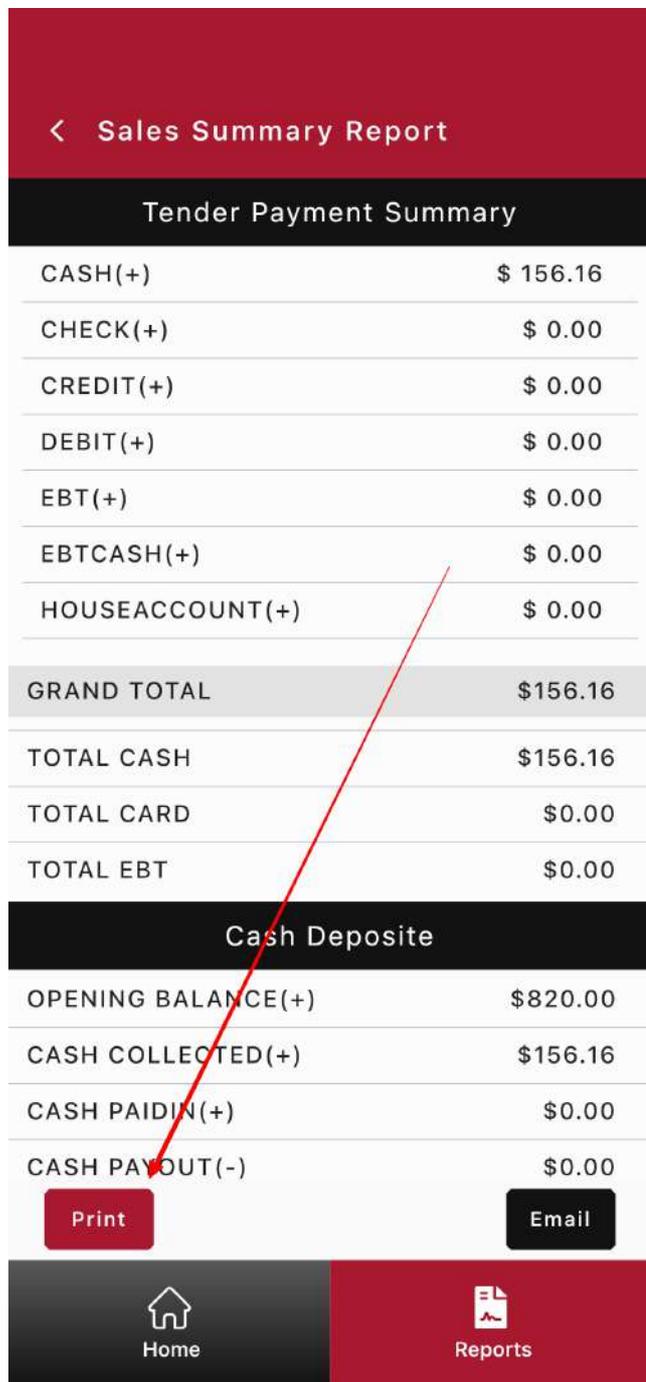
OPENING BALANCE(+)	\$820.00
CASH COLLECTED(+)	\$156.16
CASH PAIDIN(+)	\$0.00
CASH PAYOUT(-)	\$0.00

Print Email

Home Reports

## 8.1.5 Mobile App - Print Report

To print a report from your mobile app, tap Print



< Sales Summary Report

Tender Payment Summary

CASH(+)	\$ 156.16
CHECK(+)	\$ 0.00
CREDIT(+)	\$ 0.00
DEBIT(+)	\$ 0.00
EBT(+)	\$ 0.00
EBTCASH(+)	\$ 0.00
HOUSEACCOUNT(+)	\$ 0.00
<b>GRAND TOTAL</b>	<b>\$156.16</b>
TOTAL CASH	\$156.16
TOTAL CARD	\$0.00
TOTAL EBT	\$0.00

Cash Deposit

OPENING BALANCE(+)	\$820.00
CASH COLLECTED(+)	\$156.16
CASH PAIDIN(+)	\$0.00
CASH PAYOUT(-)	\$0.00

Print Email

Home Reports

## 8.1.6 Mobile App - Email Report

To email a report directly from your mobile app, tap Email

The screenshot displays the 'Sales Summary Report' screen in the mobile app. At the top, there is a red header with a back arrow and the text 'Sales Summary Report'. Below this is a table of financial data:

CASH COLLECTED(+)	\$156.16
CASH PAIDIN(+)	\$0.00
CASH PAYOUT(-)	\$0.00
CASH DROPPED(-)	\$0.00
CASH IN HAND	\$976.16

Below the table is a section titled 'Shift Details' with the following information:

SHIFT NO.	0
ROLE	-
EMPLOYEE NAME	-
SHIFT OPENING TIME	-
SHIFT CLOSE TIME	-

Next is a section titled 'Credit Card Breakdown' with a table showing 'No Data'.

CARD NAME	AMOUNT
No Data	

Below this is a section titled 'Total No Sale' with a table showing 'No Data'.

SR.NO	ROLE	DATE	TIME
No Data			

At the bottom of the report area, there are two buttons: 'Print' (red) and 'Email' (black). A red arrow points from the 'Email' button to the 'Email' button. The bottom navigation bar contains 'Home' and 'Reports' icons.