

Standard Shop



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INTRODUCTION & INSTALLATION

System Requirements

Standard Shop requires Mac OS X 10.6 or later.

Make sure you have at least 100 Mb available for the Standard Shop application, the associated files and for the data file that will be created the first time you launch the application.

Installation

To install Standard Shop, follow these steps:

1. Locate and purchase Standard Shop from the Mac App Store.
2. Standard Shop will be downloaded and installed in your 'Applications' folder automatically.
3. After installation, Standard Shop will be launched automatically, and the 'Welcome' window will be opened:

CONFIGURING A NEW DATABASE

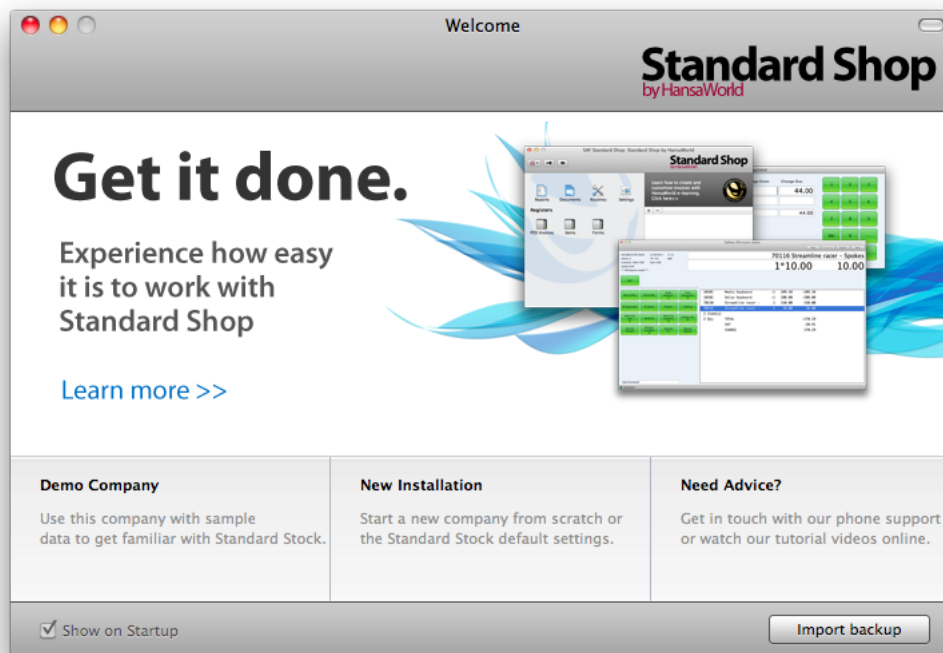
Upon opening Standard Shop by HansaWorld for the first time, you will have the choice of 'Demo Company', 'New Installation' and 'Need advice'. These choices are located at the bottom of the welcome screen.

By choosing 'Demo Company' you have the possibility to explore the system with demo data. If you choose 'Need Advice?' you will be directed to a web page with support material and contact details.

You choose 'New Installation' to start using Standard Shop with real data. After choosing this, follow the steps below.

Starting Standard Shop for the first time

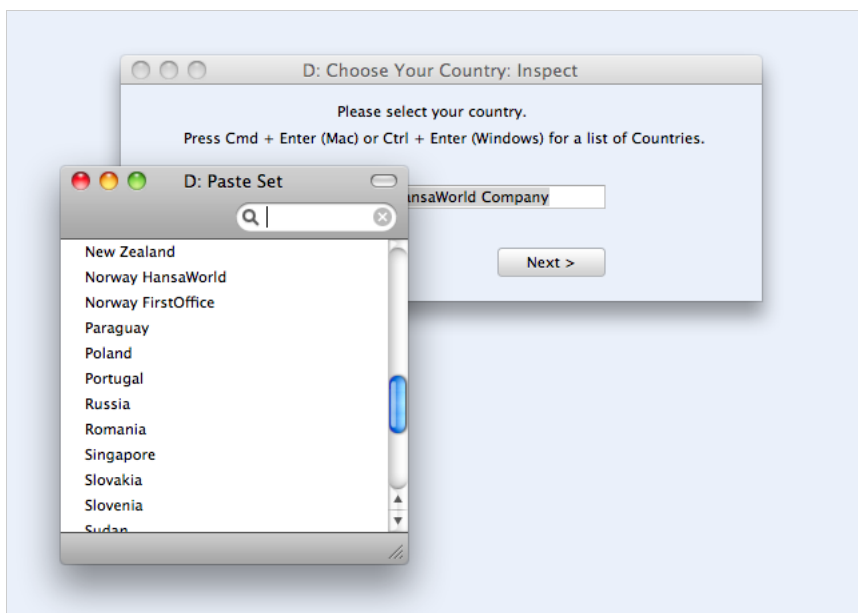
Start Standard Shop by double-clicking the icon. When the 'Welcome' window appears, click the [New installation] button.



A window called 'Create New Company' will appear. Enter company related details (e.g. address, telephone numbers) in the section called 'Company Information'. Enter your personal details (e.g. name & e-mail) in the section called 'Personal Information'.

Click [Next].

A 'Choose your country' window will appear. Choose your country by using Cmd+Enter if you use a Mac, and Ctrl+Enter if you use Windows. This will open a list of countries to choose from. Click [Next].

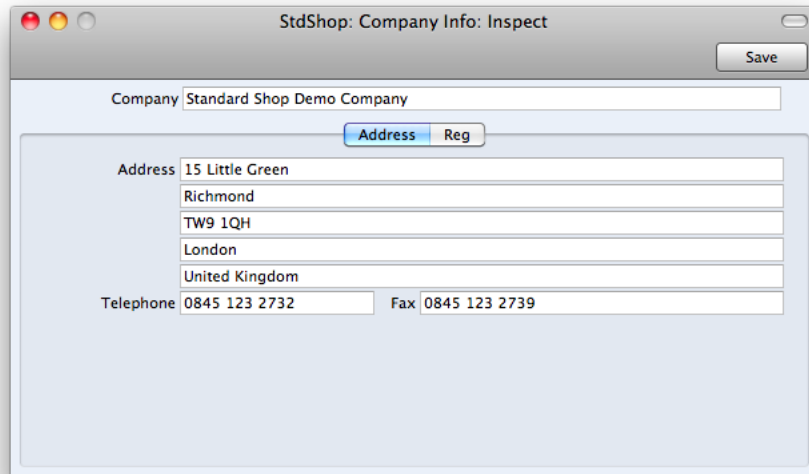


Entering Your Company Details

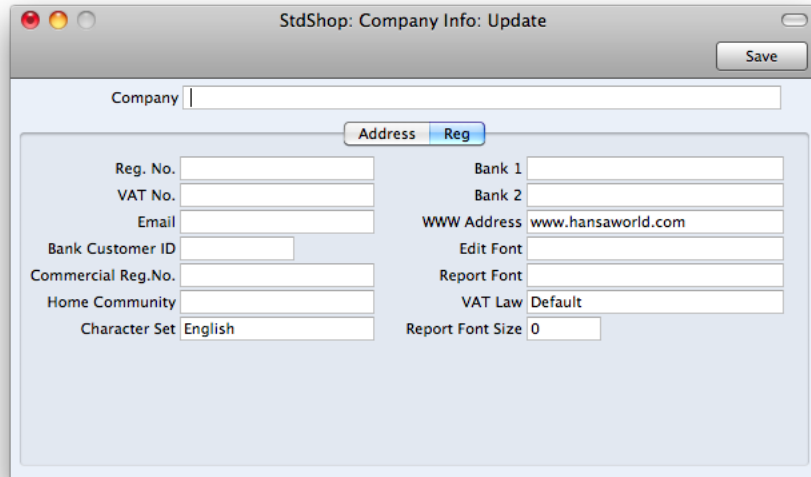
You have already entered your company details when starting up Standard Shop by HansaWorld for the first time. Now, you need to enter other company details so that they can be printed on documents such as Invoices. Follow these steps:

Click the [Settings] button in the Master Control panel or use the Cmd-S keyboard shortcut to open the list of Settings.

Double-click 'Company Info' on the list.



Enter your company address and other information that is applicable to your company.



Enter the company registration number, VAT number and your bank account details here.

Make sure that everything is correct, as this information will be printed on your documents (e.g. the Invoices that you send to your Customers).

Save the details in the Company Info setting by clicking the [Save] button in the top right-hand corner of the window. The window will be closed.

NAVIGATION

Master Control Panel

The Master Control panel is Standard Shop by HansaWorld's main tool. You can open the Master Control panel or bring it to the front at any time using the CMD-M keyboard shortcut.



The left-hand part of the Master Control panel contains a number of buttons, which are divided into two sections. Most of these buttons have a keyboard shortcut, as shown below:

Reports

Windows/Linux keyboard shortcut: Ctrl-R

Mac OS X keyboard shortcut: cmd-R

Produces reports to screen, printer, file or other print destination. The reports are described in detail in the appropriate sections below.

Documents

Windows/Linux keyboard shortcut: Ctrl-D

Mac OS X keyboard shortcut: cmd-D

Prints documents intended for external use (e.g. Invoices). How to work with documents is described in the appropriate sections below.

Settings

Windows/Linux keyboard shortcut: Ctrl-S

Mac OS X keyboard shortcut: cmd-S

Allows you to tailor the operations of each module to your requirements. The settings are described individually in the appropriate sections below.

Routines

Allows you to import and export information. Export and Imports are described individually in the appropriate sections below.

Registers

Windows/Linux keyboard shortcuts: Ctrl-1, Ctrl-2, or Ctrl-3

Mac OS X keyboard shortcuts: cmd-1, cmd-2, or cmd-3.

Separate registers are used for the different types of information stored in, and used by the system. Click on a register button to open the browse window listing all the records contained in the register.

Personal Desktop



The area on the right of the Master Control panel is known as the "Personal Desktop". If you have certain records, registers, or reports that you use often, you can move them to your Personal Desktop for easy access. You can open and run these from your Master Control panel at any time, without having to find records, reports or documents. In this way, you can therefore configure your Personal Desktop so that it gives you immediate access to the areas of Standard Shop by HansaWorld that are most important to you. The Personal Desktop is therefore similar to a list of Bookmarks in a browser.

You can place the following items in your Personal Desktop

Registers: Drag registers from the Master Control panel to the Personal Desktop.

Records: In any register, you can choose a separate record, e.g. an item, and drag it to the Personal Desktop.

Settings, reports, documents, import and export functions: Open the appropriate list window (e.g. the 'Reports' list or the 'Documents' list) and then drag an item from the list to the Personal Desktop.

Files: Click the [+] button in the top left-hand corner of the Personal Desktop and choose 'Attach File'. A standard 'Open File' dialogue window will open, allowing you to locate the file that you need.

Notes: Click the [+] button in the top left-hand corner of the Personal Desktop and choose 'Create Note'. A window will open, where you can type in your note and enter a Comment (the text that will identify the note in the list of Attachments).

Web links: Click the [+] button in the top left-hand corner of the Personal Desktop and choose 'Create Web Link'. A window will open, where you can type in the name of the web page and URL. Note that you must start URL with 'http://'.

Archive: If you need to organise items in your Personal Desktop, you can use Archives. Click the [+] button in the top left-hand corner of the Personal Desktop and choose 'Create Archive'. The 'Create Archive' window opens, where you can give the new Archive a name. When you click the [Save] button, the new Archive will appear in the Personal Desktop view. Now you can move the documents, reports or other items into the Archive by dragging and dropping onto it. To open the Archive, double-click it.

Another user cannot view the contents of your Personal Desktop. So, if someone else logs in to Standard Shop by HansaWorld on your machine using the [Login] button in the Master Control panel, your Personal

Desktop will disappear, to be replaced with theirs.

When you create the first User Account in a new database, the Personal Desktop will be activated for that User automatically. If you add extra Users to the Persons register, you will need to activate the Personal Desktop for those Users yourself. Use the 'Activate Personal Desktop' function on the Operations menu of the 'Persons: Browse' window.

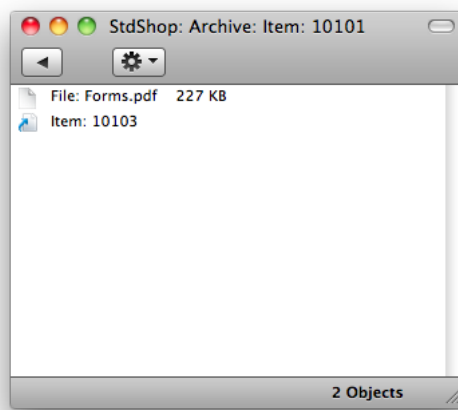
Attachments

You can connect files, notes or other records to any record in Standard Shop by HansaWorld. These connected objects are known as Attachments.



Some record windows contain a [Attachments] button in the top right-hand corner.'

Click this button to work with Attachments (or select 'Attachments' from the Record menu). A list of objects currently attached to the record is opened.



This list has its own Operations drop-down menu, which contains the functions necessary to attach, view and remove Attachments.

You must save a record at least once before you can add any Attachments.

You can attach the following items to records of all kinds:

Files: Open the list of attachments and choose 'Attach File' from the Operations menu. A standard 'Open File' dialogue window will open, allowing you to locate the file that you need.

Notes: Open the list of attachments and choose 'Create Note' from the Operations menu. A window will open where you can type in your note and enter a Comment (the text that will identify the note in the list of Attachments).

Records: You can attach a record to another record by dragging it from its browse window onto the [Attachments] button of the other record. If the record is already open, drag its [Attachments] button onto the [Attachments] button of the other record.

To open or read an Attachment, double-click it in the list of Attachments or select 'Open Record' from the Operations menu. If the Attachment is a file, double-click on it to save it to your hard disk or use 'Open Record' to open it in the relevant application.

If a record has many Attachments, you can organise them using Archives. Open the list of Attachments and select 'Create Archive' from the Operations menu. The 'Create Archive' window opens, where you can give the new Archive a name. When you click the [Save] button, the new Archive will appear at the top of the list of Attachments. Move the Attachments into the Archive by dragging and dropping onto it. To open the Archive, double-click it. To go back to the top-level list of Attachments, click the button with the arrow icon.

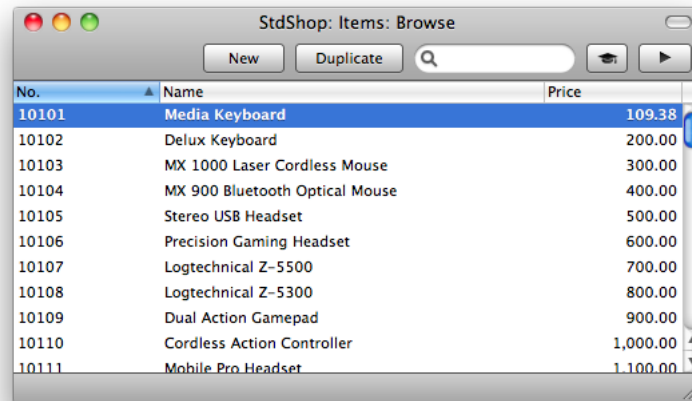
To remove an Attachment of any kind from a record or Archive, highlight it in the list of Attachments and select 'Clear' from the Edit menu.

Different Types of WindowS

There are seven types of windows in Standard Shop by HansaWorld. All window types are described below:

Browse Window

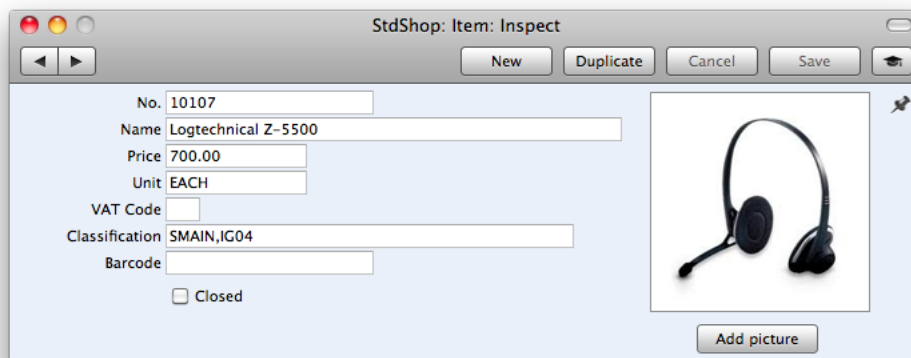
Browse windows are used to display lists of records. In a browse window, you can search for a certain record and select a specific record for processing.



You can scroll through the list using the scroll bar on the right. You can change the sort order of the list by clicking the heading of the column you want to sort by, and the list will re-sort immediately. The heading of the column will be coloured blue to show the selected sort order. If you click on the heading a second time, the sort order will be reversed.

Record Window

The record window is where you enter or edit information. All data entry is made in windows of this type. A record window is opened when you open a specific record from a browse window by double-clicking, and when you create a new record.



The heading may read 'New', 'Inspect', 'Update' or 'Deleting', depending on the circumstance.

New: You are creating a new record and this record has not been saved yet.

Inspect: The record is saved.

Update: You are making new edits to a previously saved record.

Deleting: The record is in the process of being deleted.

Press Enter, TAB or arrow keys to move from field to field.

These are the [Previous Record] and [Next Record] buttons. Use them to go from record to record. At the same time everything you may have changed in the record you are leaving will be saved.



New: Click this button to create a new blank record. Alternatively press CMD-N.

Duplicate: Click this button to create a copy of the current record.

Alternatively press CMD-Y.

Save: This button saves all changes to the current record. Alternatively press Shift-Enter.

To print the current record, click the Printer icon.



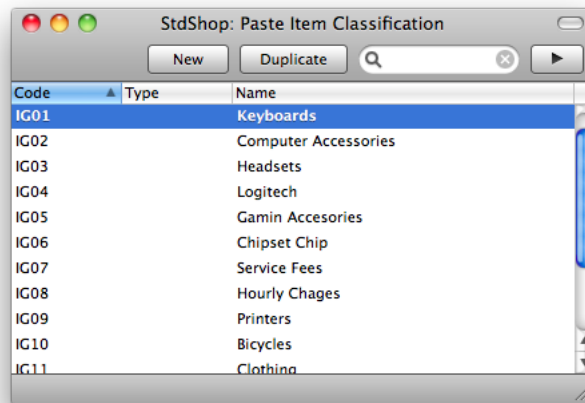
To print it to screen first, click the Print Preview icon.



You can delete or invalidate a record by using Delete or Invalidate in the Record menu.

Paste Special (CMD-Enter)

When you enter information in Standard Shop by HansaWorld, you may need to refer to another register or setting. For example, when entering an Item, you can bring in the Classifications, (VAT code, etc) using the "Paste Special" command. Pressing CMD-Enter in a field opens a selection list.



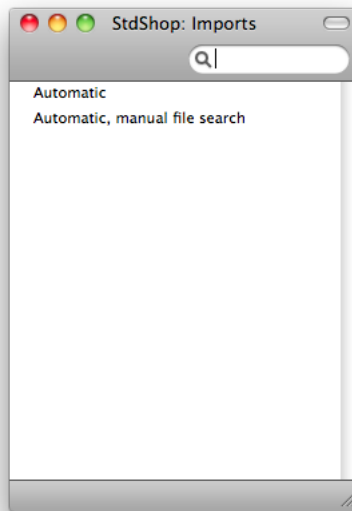
You can make the "Paste Special" feature even more powerful by saving the sort order of the "Paste Special" list. For example, whenever you need to choose a Contact, you will probably know its Name but not its Contact Number. The first time you use the "Paste Special" feature to choose a Customer, sort the list by Name and save this position using the Window menu and Save Position option. From now on, the list will be sorted by Name when it opens.

Now you can type the first few characters of the Customer Name in a Customer field and then press CMD-Enter. When the "Paste Special" list opens, the highlighted Customer will be the first one to match what was typed. If this is the correct one, all you need to do is press the Enter key and carry on without interruption.

If the record you are looking for does not exist and therefore is not shown in the "Paste Special" list, you can often enter it on the fly in the "Paste Special" window. You can directly open a new record, pressing New or CMD-N. A new Customer record is shown. Enter the new Customer, click [Save] and the new record is saved. At the same time, the Customer Number is automatically entered in the Invoice.

List Window

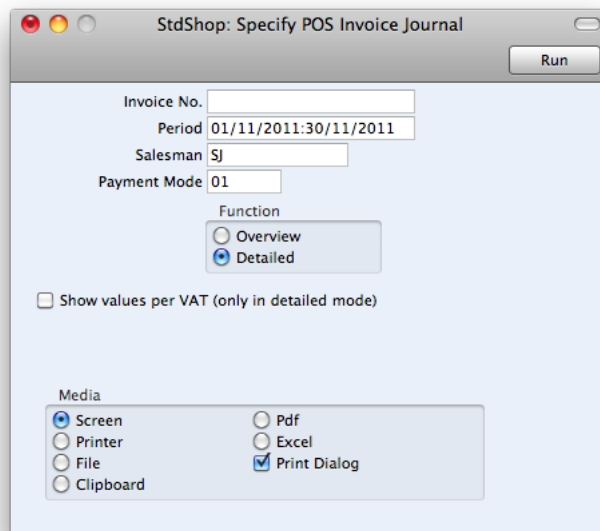
The list window is used whenever it is necessary to choose from a list of options, usually after accessing the "Reports", "Documents", "Exports", "Imports" and "Settings" functions. Double-click your choice in the list, or click it once with the mouse and then press the Enter key.



You can use the scroll bar to find the item that you want, or you can type the first letters of its name in search field.

Specification Window

Specification windows allow you to specify the contents of a report or document.



A specification window will usually appear after you have selected an option in a list window. Once you have entered the report or document criteria, click [Run] or Shift-Enter to run the report or document.

Report Window

Report windows are used to display the reports you print to the screen.

No	Date	Due Date		
3	24/02/2011			
CASH-COD			Cash and COD Sales (Open accounts)	
50000.BLACK.L	1	Branded T Shirt, Black, Large	75.00	75.00 1
50001.BLUE.M	1	Baggy shorts, Blue, Medium	275.00	275.00 1
50001.GREEN.M	1	Baggy shorts, Green, Medium	275.00	275.00 1
Total Items			Object	VAT Amount
3			AMS,CPT	87.50
4	27/09/2011			
CASH-COD			Cash-COD	
10101	1	Media Keyboard	109.38	109.38 1
Total Items			Object	VAT Amount
1				21.88
5	15/11/2011			
CASH-COD			Cash-COD	
10101	1	Media Keyboard	109.38	109.38 1
10102	1	Delux Keyboard	200.00	200.00 1
10103	1	MX 1000 Laser Cordless Mouse	300.00	300.00 1
Total Items			Object	VAT Amount
3				121.88
			Excl VAT	Incl VAT
Total			1,343.76	1,575.02
			Total Number of Invoices:	3

The Report Header shows the name of the report and the selection on which it is based. This is important information, since all reports can be produced using different selections. Below this is the report itself, always shown in its full width in its own window.

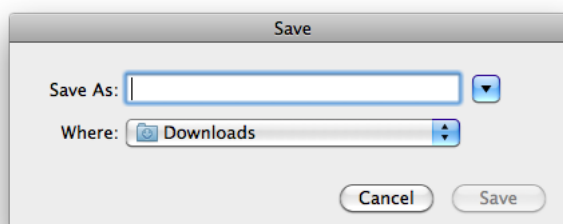
Since each report is shown in its own window, several reports can be put on the screen at the same time, totally independently. This gives Standard Shop by HansaWorld an unmatched reporting power. Standard Shop can easily give you information that can only be obtained after some complicated maneuvering in other accounting systems.

There is no limit to the number of reports that can be shown simultaneously on the screen, and reports from different modules may be mixed freely. Since the windows are completely independent, report windows can be mixed with data entry windows and lists from different parts of the system.

All reports are printed by clicking the Printer icon in the Button Bar of the window containing the report.

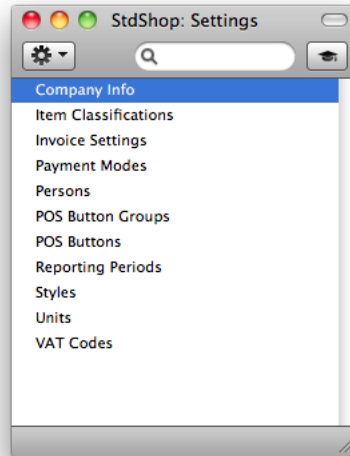
File Dialogue Window

Standard Shop by HansaWorld uses the standard Macintosh/Windows file dialogue window when it requires you to select a file for import, or to give a file name to an export file.



GENERAL SETTINGS

Settings allow you to tailor the operation of Standard Shop by HansaWorld to your requirements. Many settings take the form of preferences, e.g. "Invoice Settings", that are needed for items to be handled correctly on invoices. Other settings require a number of records to be entered. This information tends to be used in the 'look-up' tables (i.e. 'Paste Special' windows) from the main registers, e.g. "Item Groups".

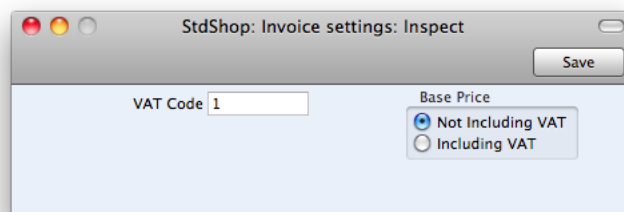


To edit or add to a setting, click the [Settings] button in the Master Control panel. You can also use the CMD-S keyboard shortcut. The 'Settings' list window opens, showing the various settings or preferences available in Standard Shop by HansaWorld. Double-click any of the items in the list to view, change or add to any of the settings.

Invoice Settings

This setting allows you to define any number of Classifications by which you can categorise your Items. This is done using the Classification field on the Item record. This field can contain one or more Classification Codes, separated by commas. So, for example, an Item such as a radio/cassette player can be both a radio and a cassette player.

Specify the default VAT code to be used on invoices here.



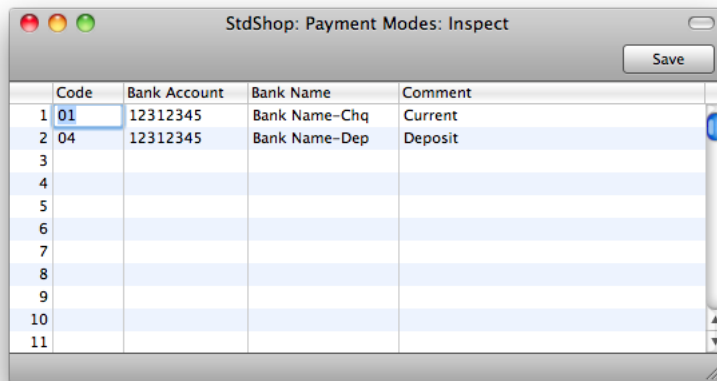
Also define whether your item prices are inclusive or exclusive of VAT here.

Payment Modes

Payment Modes represent the different methods by which your Invoices will be paid by your Customers. Typical examples would be cash and credit card.

To open this setting, click [Settings] in the Master Control panel, and then double-click 'Payment Modes' in the 'Settings' list. Fill in the fields as described below. Then, to save changes and close the window, click the [Save] button. To close the window without saving changes, click the close box.

You can enter as many different Payment Modes as you need, using the grid on the 'Payment Modes' screen. To add a Payment Mode, click in the Code field of the first blank row and enter the appropriate text. To remove a Payment Mode, click on the row number on the left of the row and press the Backspace key.



	Code	Bank Account	Bank Name	Comment
1	01	12312345	Bank Name-Chq	Current
2	04	12312345	Bank Name-Dep	Deposit
3				
4				
5				
6				
7				
8				
9				
10				
11				

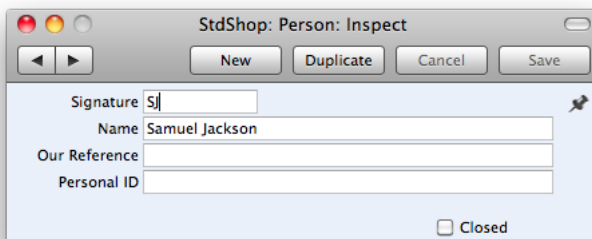
Code: Enter a unique code by which the Payment Mode is to be identified from elsewhere in Standard Shop by HansaWorld.

Bank A/C No & Bank Name: Specify here the bank account number and name, used for this Payment Mode.

Comment: The name of the Payment Mode. This will be shown in the 'Paste Special' list, so it should be descriptive enough to make the selection of the correct Payment Mode easy for all users.

Persons

This register holds information about Persons, i.e. users, employees, sales persons etc. It can be used as part of your Hansa security system: each Person can be given their own password. Once a single record has been entered to the register, starting Hansa will require the entry of a Person's initials and, if appropriate, a password. However, if the Person register contains a blank record, the password and logging on window will not appear.



StdShop: Person: Inspect

Navigation: < >

Buttons: New Duplicate Cancel Save

Signature: S|

Name: Samuel Jackson

Our Reference: _____

Personal ID: _____

Closed

Signature: The person's initials

Name: The person's full name

Our Reference: You can assign a short (up to 20 characters) reference text for the individual. This text will appear in the Reference fields of all transactions entered by this Person.

Personal ID: In countries where personal identity cards are carried, the Person's ID number from their card can be entered in the ID field. This can be made to appear on any printed documentation associated with the employee.

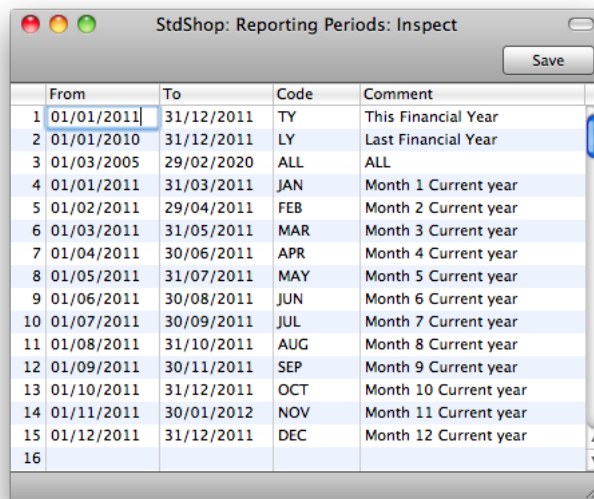
Reporting Periods

This setting allows you to name and define time periods that you commonly use when producing reports. You will see a list of entered Report periods when you use 'Paste Special' from the 'Period' field in any report specification window. Therefore, if you, for example, want to produce monthly reports you should define each month as a separate period in this setting.

To set up Reporting periods, follow the below steps:

1. Go to the System module, open [Settings] and double-click on 'Reporting Periods'.
2. Specify relevant periods by entering dates in 'From' and 'To' columns. (e.g. From 01/01/2011 and To 01/31/2011 if you want to have a reporting period for January 2011. Or From 01/01/2011 and To 12/31/2011 for full year 2011.)

3. Assign a code to each reporting period (e.g. 2011), and a comment (e.g. Year 2011).
To enter a new Reporting Period, simply click in the first blank line and enter the applicable details.
4. When you have entered the relevant reporting periods, click the [Save] button to save changes and close the window.



	From	To	Code	Comment
1	01/01/2011	31/12/2011	TY	This Financial Year
2	01/01/2010	31/12/2011	LY	Last Financial Year
3	01/03/2005	29/02/2020	ALL	ALL
4	01/01/2011	31/03/2011	JAN	Month 1 Current year
5	01/02/2011	29/04/2011	FEB	Month 2 Current year
6	01/03/2011	31/05/2011	MAR	Month 3 Current year
7	01/04/2011	30/06/2011	APR	Month 4 Current year
8	01/05/2011	31/07/2011	MAY	Month 5 Current year
9	01/06/2011	30/08/2011	JUN	Month 6 Current year
10	01/07/2011	30/09/2011	JUL	Month 7 Current year
11	01/08/2011	31/10/2011	AUG	Month 8 Current year
12	01/09/2011	30/11/2011	SEP	Month 9 Current year
13	01/10/2011	31/12/2011	OCT	Month 10 Current year
14	01/11/2011	30/01/2012	NOV	Month 11 Current year
15	01/12/2011	31/12/2011	DEC	Month 12 Current year
16				

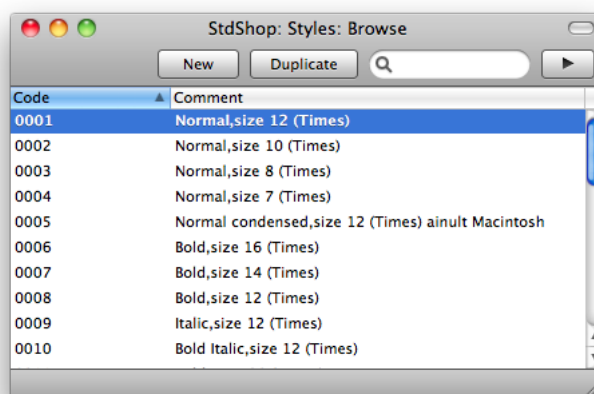
Note that the Reporting Period in the first row of this setting will be offered as a default wherever a Reporting Period is required. You might therefore like to change the first row from time to time so that a useful option is always offered as a default. Further, once memorised, the Codes can be used as a fast way of choosing a Report Period. Simply type the code in the Period field of a report specification window and the correct period will be shown.

Codes such as '1', '2' and so on are very useful for representing the months of the year (and 'Q1', 'Q2', etc. for the quarters), it can be useful to change the periods associated with these Codes annually.

To delete the old first row once it is no longer useful, click on the row number and press the Backspace key. To insert a new record on the first row, click on the row number and press the Return key.

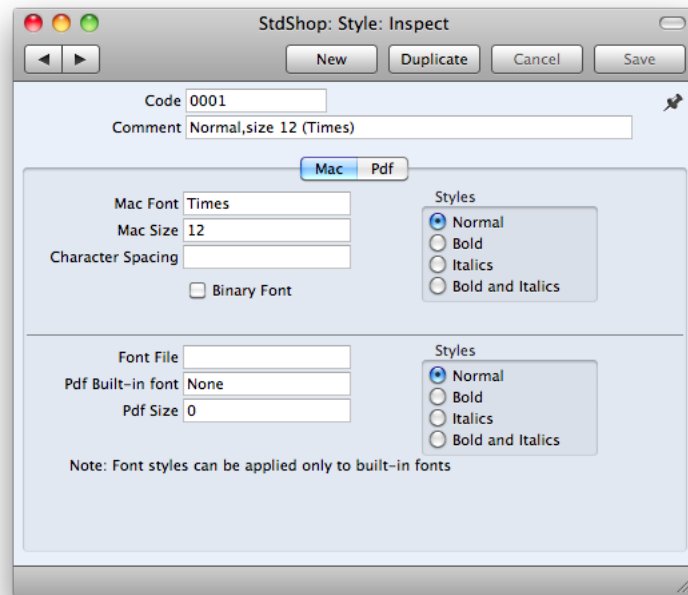
Styles

In this setting, you can define the different font Styles to be used in the Fields and Text objects in your Forms, ensuring consistency of appearance.



Code	Comment
0001	Normal,size 12 (Times)
0002	Normal,size 10 (Times)
0003	Normal,size 8 (Times)
0004	Normal,size 7 (Times)
0005	Normal condensed,size 12 (Times) ainult Macintosh
0006	Bold,size 16 (Times)
0007	Bold,size 14 (Times)
0008	Bold,size 12 (Times)
0009	Italic,size 12 (Times)
0010	Bold Italic,size 12 (Times)

Double-click 'Styles' in the 'Settings' list in the System module to open the 'Styles: Browse' window and see a list of the defined Styles.



Code: The code for the Style.

Comment: Any description.

Mac/Windows/Linux Font: The name of the font file, as it appears in the Windows directory or the System folder on your computer.

Mac/Windows/Linux Size: The font size in points.

Styles: Select one of the available style types.

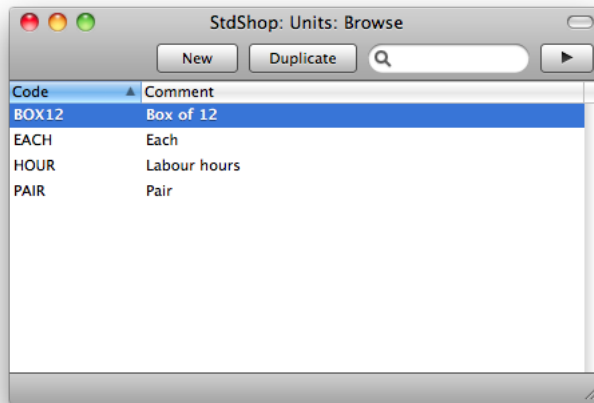
Character Spacing: This is used when printing certain forms, where a fixed character spacing is required. Specify the spacing in pixels from the start of one character to the start of the next. Usually this will be six pixels or less.

Styles with a Character Spacing can only be used in Fields and Text objects with a left or right justification. The Character Spacing will have no effect in Fields and Text objects with a centre justification.

This feature applies to Macintosh only.

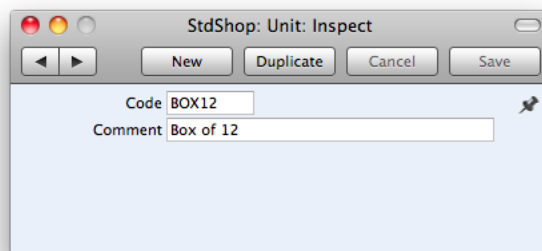
Units

Enter the different shipping and pricing Units used in your business (e.g. single Items, pairs and dozens).



Once you have entered your Units to this setting, you can assign them to your Items using the Unit field of each Item record. This is the quantity to which the Item's price refers. For example, if an Item is bought and sold in boxes of twelve, its Unit should be a "Dozen". When the Item is included in an Invoice, the Quantity will refer to this Unit. If the Quantity on an Invoice is 2, this means "two boxes of twelve". If the Price is 85.00, this means "85.00 for a box of twelve".

On double-clicking 'Units' in the 'Settings' list, the 'Units: Browse' window is displayed, showing all Unit records previously entered. Double-click an item in the list to edit, or add a new record by clicking the [New] button in the Button Bar. When the record is complete, click the [Save] button in the Button Bar to save it.



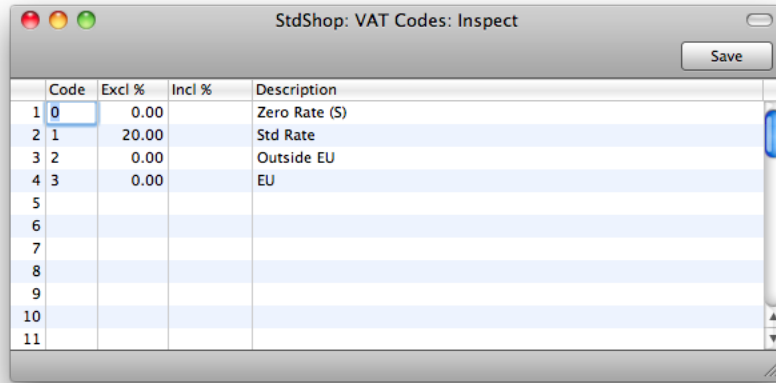
Code: Enter the unique Code by which the Unit record is to be identified from elsewhere in Standard Shop. You can enter up to five characters, and you can use both numbers and letters.

Comment: You will enter the name for the Unit record here, as it will be shown in the 'Units: Browse' window and the 'Paste Special' list.

VAT Codes

The VAT Codes are used on items in Standard Shop by HansaWorld to use the correct VAT percentage.

To edit the VAT Codes, double-click 'VAT Codes' in the 'Settings' list. The following window appears:



The screenshot shows a window titled "StdShop: VAT Codes: Inspect" with a "Save" button in the top right corner. The window contains a table with the following data:

	Code	Excl %	Incl %	Description
1	0	0.00		Zero Rate (S)
2	1	20.00		Std Rate
3	2	0.00		Outside EU
4	3	0.00		EU
5				
6				
7				
8				
9				
10				
11				

To edit a VAT Code record, simply click on the field to be changed and overwrite the existing entry. To add a new VAT Code record, scroll down to the first blank line. The information required for each VAT Code record is as follows:

Code: Each VAT Code record should be identified by a unique Code.

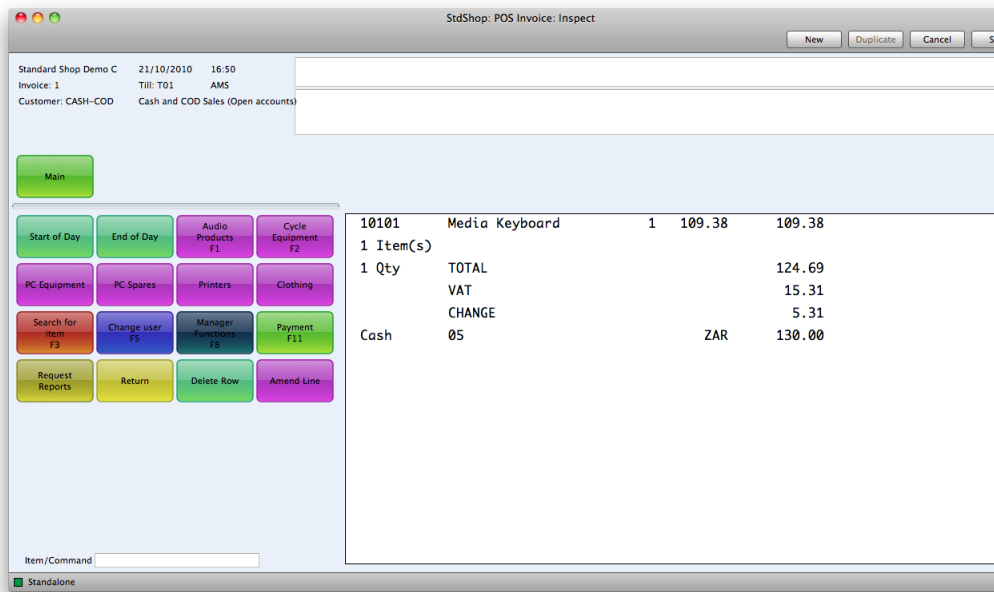
Excl %: Specify the percentage to be applied to a figure that excludes VAT in order to calculate the VAT amount.

Incl %: Specify the percentage to be applied to a figure that includes VAT in order to calculate the VAT amount.

Description: The description entered here will appear in the 'Paste Special' list, so it should be detailed enough to ensure the correct VAT Code is always chosen. To save changes and close the window, click the [Save] button. To close the window without saving changes, click the close box.

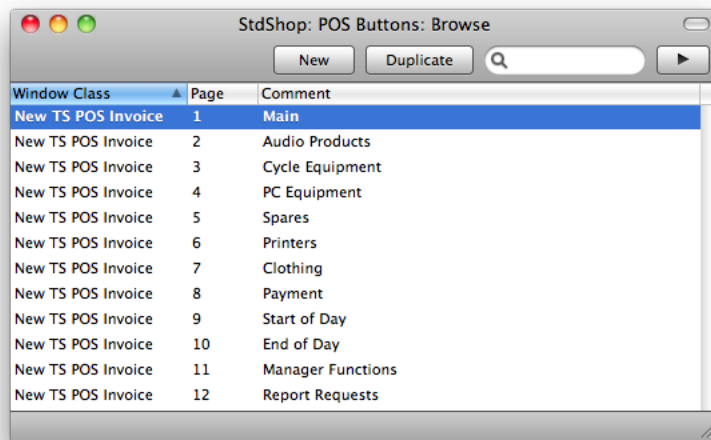
SETTING UP POS BUTTONS

You can design your own POS Invoice by creating the buttons you would need to use, giving them the names and colours that you like. Below is an example of POS Invoice screen:

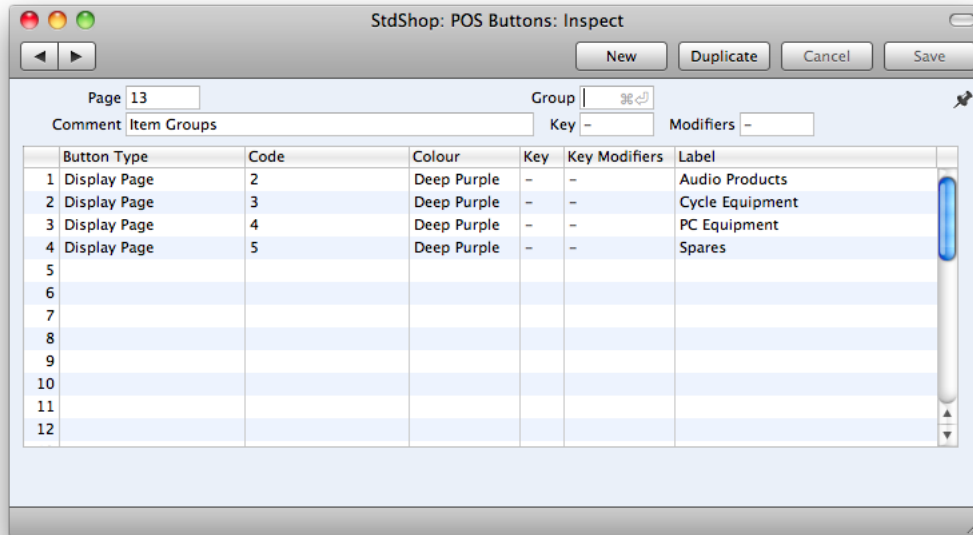


POS Buttons Setting

In this setting you can create all buttons used on POS Invoices.



In case there are more buttons to use than the maximum number of buttons that fit the screen, it is possible to have several pages by selecting "Display Page" option. Then on the page referenced as the display page, it is possible to have more buttons just like on the main page.



Button Type	Code	Colour	Key	Key Modifiers	Label
1 Display Page	2	Deep Purple	-	-	Audio Products
2 Display Page	3	Deep Purple	-	-	Cycle Equipment
3 Display Page	4	Deep Purple	-	-	PC Equipment
4 Display Page	5	Deep Purple	-	-	Spares
5					
6					
7					
8					
9					
10					
11					
12					

The Button type column has paste special to all possible options. Here are the descriptions for each. For payment mode buttons, please see the next paragraph.

Blank – use the blank button to create space between buttons

Amend line – enables you to amend any details on the line

Change User – opens the login window enabling another person to log in with their name

Delete Row – enables you to delete a row from the invoice

Display Page – specify the page you want to open with this button in the Code column

Finish – prints the invoice and opens a new blank one

Invalidate Invoice – invalidates the invoice by putting a red line through it

Item – in the code field, you can pick the item codes with Paste-Special (Ctrl-Enter)

Item Search – Opens the Item Search window

Open Cash Draw – Opens the cash draw

Open Invoices – Opens the Invoices: Browse window

Pay – opens the payment window

Price Lookup – enables you to look up the Item price by its code or barcode

Return – enables you to credit a POS Invoice

Return Invoice No – enables you to look up a returned invoice

Select Salesman – opens a window where you can pick the salesperson

Sales Assistant - opens a window where you can pick the sales assistant

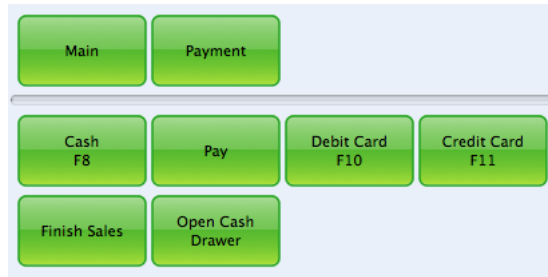
Save Invoice – saves the invoice without requiring a payment

Void Item – removes an item from the invoice

The Code column should be left blank, except for the following cases:

1. Cash, Cheque, Credit Card, Debit Card button types where code is paste special to payment modes from local machine payment modes, which payment mode to use for the specific payment.
2. Display Page: enter which page you want to open with the button
3. Item: Paste special for Item register. Can be used for any item, including plain items for parking fee, or bags, etc.

Payment Mode Buttons



You can set up a separate page for all Payment Modes you want to use on POS Invoices. To do that, you create a new page with comment "Payment". In the Button Type column you pick from the following payment options:

Cash – for payments made in cash

Cheque – for payments made with cheque

Credit Card – for payments made with credit card

Credit Card Payment Reversal – this button allows you to reverse a credit card payment

Debit Card – for payments made with a debit card

The payment buttons are connected to the Payment Modes via the Code field in the POS Buttons Setting.

POS Button Groups

In order to facilitate the use and setup of POS Buttons, it is possible to group them into POS Button groups.

To work with POS Button Groups, first click the [Settings] button in the Master Control panel. Double-click 'POS Button Groups' in the 'Settings' list. Then click [New] to open a new record, or double-click an existing record to modify it.

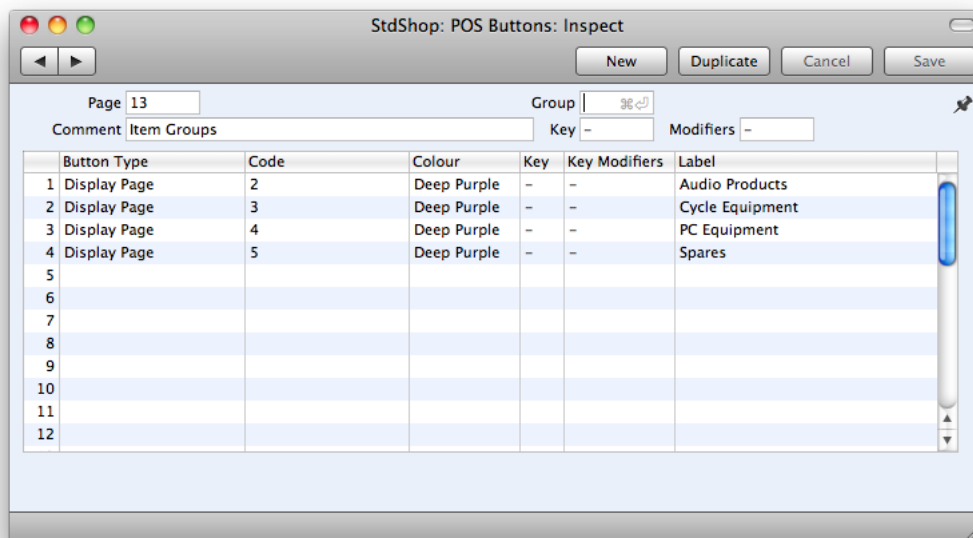
No.: Enter the code or number identifying this POS Button Group. You can use any combination of letters and numbers. There is a maximum of five characters.

Name: Enter the name or description of the POS Button Group.

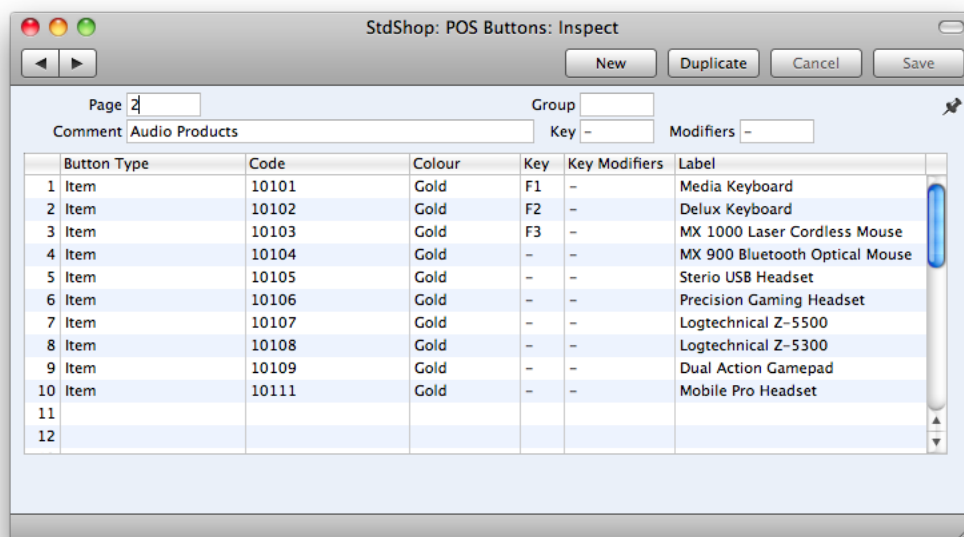
Setting up Multiple pages of Buttons on the POS Invoice

You can set the Buttons on a POS invoice on multiple levels. To do so, you set up different pages in the POS Buttons setting and give each of them names (in the Comment field in the header).

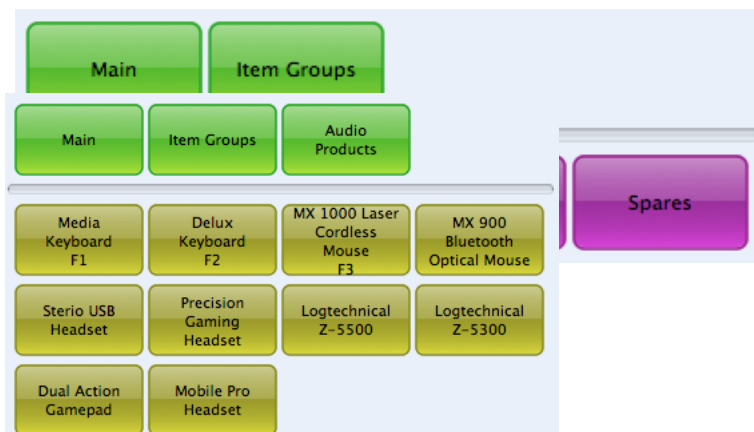
For example you can set up a page called Item Groups and specify all the subsequent pages that will show the individual Items belonging to each group:



Each Item group page is designed as follows:



Clicking on the Item Groups button on the Invoice opens the following screen:



Clicking on Audio Products from here, for example, takes you to the next level where you can pick the items:

This way you can set up any number of levels and dimensions of POS Buttons you need.

SETTING UP AND ENTERING ITEMS

Standard Shop offers several ways to facilitate working with your items.

Item Groups Setting

It can be practical to organize Items of similar kinds into Item Groups. This option gives you more flexibility in reporting.

To work with Item Groups, first click the [Settings] button in the Master Control panel. Double-click 'Item Groups' in the 'Settings' list. Then click [New] to open a new record, or double-click an existing record to modify it.

No.: Enter the code or number identifying this Item Group. You can use any combination of letters and numbers. There is a maximum of five characters.

Name: Enter the name or description of the Item Group.

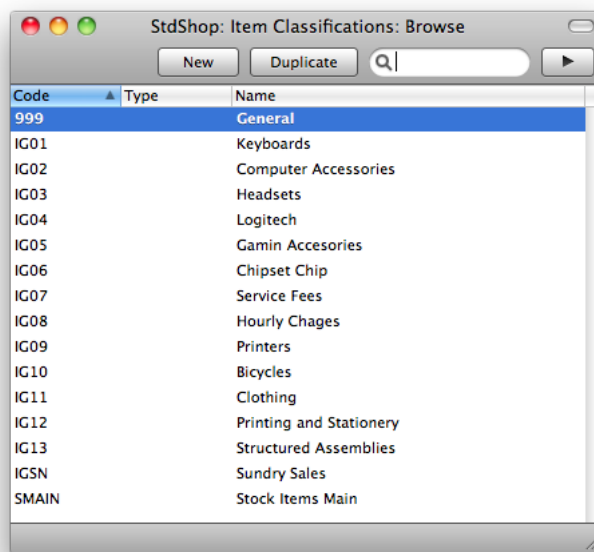
Item Classifications

In addition to Item Groups, you define Classifications for your Items to create categories that are even more detailed and flexible. While each Item can belong to just one Item Group, the number of Classifications you can assign is not limited.

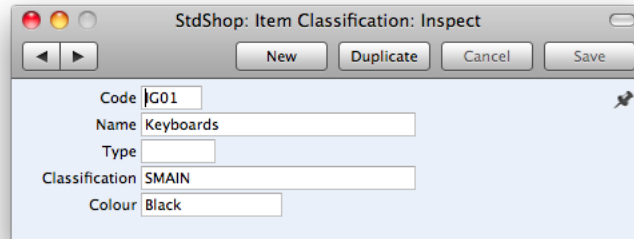
This setting allows you to define any number of Classifications by which you can categorise your Items. This is done using the Classification field on the Item record. This field can contain one or more Classification Codes, separated by commas. So, for example, an Item such as a radio/cassette player can be both a radio and a playback device.

Classifications can be used to group Items together for sales purposes, so that it will be easier for users and Customers to find the Items that they want.

On double-clicking 'Item Classifications' in the 'Settings' list the 'Classifications: Browse' window opens, listing the available Item Classifications.



To enter a new record, click the [New] button in the Button Bar. The 'Item Classification: New' window appears: enter the required details and click [Save] to save the new record.



Code: Enter a unique code to identify this particular Item Classification. It can consist of up to five alphanumeric characters.

Name: Assign a descriptive name to the Item Classification. This is shown in the 'Item Classifications: Browse' window and the 'Paste Special' list: it should therefore be descriptive enough to make the selection of the correct Item Classification easy for all users.

Type: If necessary, you can group Item Classifications of a broadly similar nature together by assigning them to the same Classification Type.

Classification: Use this field to define a hierarchical structure for your Item Classifications.

The Item Register

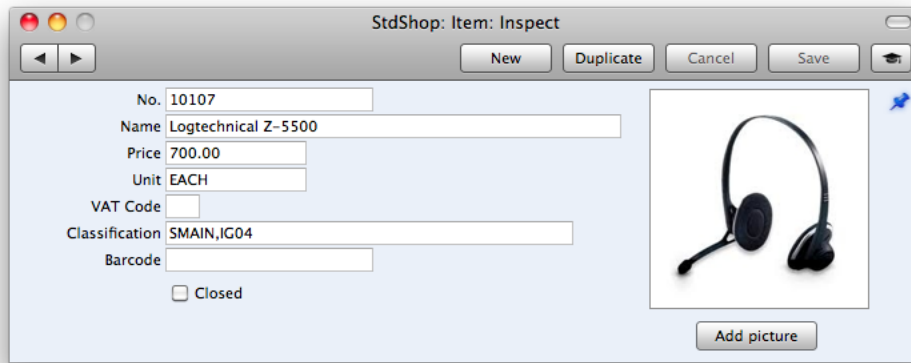
The Item register contains information about the products and services that you sell.

To work with Items, open the Item register by clicking the [Items] button in the Master Control panel or using the CMD-7 keyboard shortcut. The 'Items: Browse' window is opened, showing a list of Items already entered.

No.	Name	Price
10101	Media Keyboard	109.38
10102	Delux Keyboard	200.00
10103	MX 1000 Laser Cordless Mouse	300.00
10104	MX 900 Bluetooth Optical Mouse	400.00
10105	Stereo USB Headset	500.00
10106	Precision Gaming Headset	600.00
10107	Logtechnical Z-5500	700.00
10108	Logtechnical Z-5300	800.00
10109	Dual Action Gamepad	900.00
10110	Cordless Action Controller	1,000.00
10111	Mobile Pro Headset	1,100.00

To create a new Item, click the [New] button above the list, or use the CMD-N keyboard shortcut. Alternatively, highlight an Item similar to the one you want to enter and click [Duplicate] (or use CMD-Y).

The 'Item: New' window will open, empty if you clicked [New] or containing a duplicate of the highlighted record. Complete the Item record as required, then save it using the [Save] button and close the window by clicking the close box. Then, close the browse window using the close box again.



The Item window contains the following fields:

No.: Enter the unique Identification code you are assigning to this Item. This is the means by which you will identify the Item when including it in Invoices. The field holds up to 20 characters.

Name: Enter the name of the item here.

Price: Enter the normal sales price for the Item here.

Unit: Specify the quantity to which the Price refers to here. In the majority of cases, this will be a single item, but otherwise it may be a pair or a dozen.

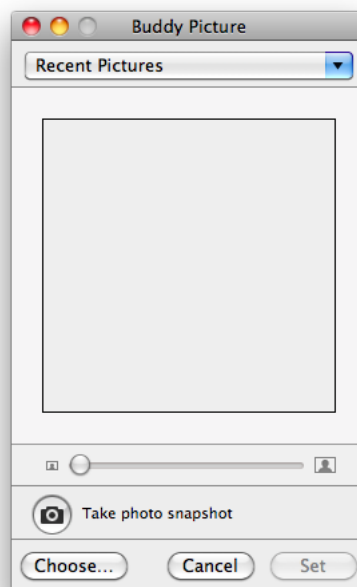
VAT Code: When entering Invoices and including this Item, the VAT Code entered will be used on the invoice. This Code will determine the rate at which VAT will be calculated for this Item when it is sold.

Classification: Enter the Classification to which this Item belongs. Items can belong to more than one Classification: enter as many Classifications as necessary, separated by commas.

Barcode: Enter a barcode for the Item.

Closed: Check this box if the Item is no longer to be used (Item records cannot be deleted if they have been used on Invoices). Closed Items will appear in the 'Items: Browse' window, but you will not be able to use a closed Item on Invoices. A closed Item can be re-opened at any time.

Picture: The [Add Picture] button allows you to add a picture to an Item record. When you click this button, the 'Buddy Picture' window opens:



If the picture is already on your hard disk, click the [Choose] button to locate it. The maximum

picture size is 280 x 280 pixels: larger pictures will be cropped.

Alternatively, click the button with the camera icon marked 'Take a video snapshot' to take a photograph of the Item using your computer's camera.

In both cases you can then scale the picture using the slider and, if the picture is too big, move the picture by dragging, so that the part you need is in the centre of the frame (the part outside the frame will be cropped).

Finally, click the [Set] button to add the picture to the Item.

When you use 'Paste Special' to add Items to Invoices, the Item pictures will appear above the 'Paste Special' list to help you choose the correct one.

Editing an Item

To edit an Item, first open the Item register by clicking the [Items] button in the Master Control panel or using the CMD-2 keyboard shortcut.

The Items are initially listed in Item Number order. Change the sort order by clicking on one of the column headings. The blue color of the heading shows the current sort order.

To search for a specific Item, enter the text to be found in the Search field in the top right-hand corner of the window and press Return. The text should be appropriate for the current sort column. To search by Item Description, for example, sort by Description before entering a Description (or its initial letters) to the Search field.

To modify an Item record, double-click on the line in the browse window. The Item record will be opened in a window entitled 'Item: Inspect'. The fields in this window are the same as those in the 'Item: New' window: please refer to the previous section for a detailed description of each field.

Edit the fields as necessary. Move from field to field using the Tab, Enter or Return keys, using the arrow keys, or using the mouse. Click the [Save] button when you have finished, to save the changes.

Deleting an Item

To delete an item, follow the steps below. Note, you cannot undo the deletion of an item. Also, you cannot delete an Item if you have used it on an Invoice

1. Find the Item you want to delete in the 'Items: Browse' window, using the Search feature described in the previous section.
2. Double-click the Item record to open it.
3. Select 'Delete' from the Record menu. The Item will be deleted.

CREATING POS INVOICES

Entering a POS Invoice

1. Scan the items or press the "Search for item" button to enter Items. You can change the quantity by pressing the button type "Amend Line".
2. When the sale is finished, press the relevant payment mode button(s)
3. Use button type "Finish" to approve and close the invoice, and automatically create a new one.

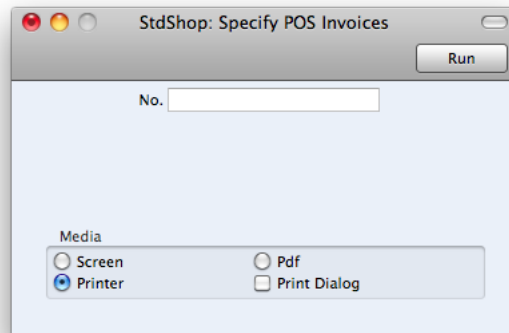
Printing POS Invoices

POS Invoices are printed automatically when the "Finish" button is pressed on the invoice screen.

If you want to print a range of POS Invoices, follow the instructions below:

Click the [Documents] button in the Master Control panel or use the CMD-D keyboard shortcut. Then, double-click 'POS Invoices' in the 'Documents' list.

The 'Specify POS Invoices' window is shown.



If you want to print a single POS Invoice, enter the Invoice Number. To print a range of POS Invoices, enter the highest and lowest Invoice numbers separated by a colon (:).

Press [Run] in the Button Bar to start printing, or cancel by closing the window.

Credit Notes / Returns

If you want to credit a POS Invoice, you should do this as follows:

1. Open the 'POS Invoices: Browse' window.
2. Find the invoice to be credited in the list, open it and Press button type "Return"
3. A new invoice is created on the screen with negative amounts.

For partial credit, proceed as follows:

Simply remove all the rows you do not want to credit. Click on the row to highlight the whole row, and press button type "Delete Row"

In the case of individual rows requiring a partial credit, simply change the Quantity field to show the quantity to be credited with button type "Amend line".

Click the Finish button when payment is also settled. The Invoice is automatically printed to the computer's default printer.

Defining a form for printing POS Invoices

The form that is used for printing the invoices is determined as follows:

1. Using the Forms setting, design the POS invoice form and name it (in this description, we have used the name "INVOICE"). Use the 'Properties' function on the Operations menu to assign a Document Type of "Invoice". A sample Invoice Form is supplied with Standard Shop by HansaWorld. This can be modified to suit your

requirements.

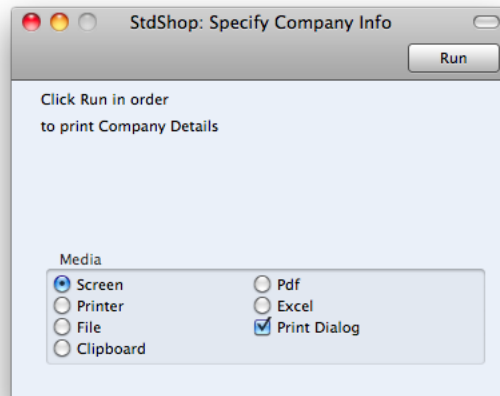
1. Click the [Documents] button in the Master Control panel or use the CMD-D keyboard shortcut. The 'Documents' list window is opened. Highlight 'POS Invoices'.
3. Select 'Define Document' from the Operations drop-down menu.
4. In the subsequent window, enter "INVOICE" in the Form field of the first row (you can use 'Paste Special' to ensure the spelling is correct).
5. Click [Save] to save the Invoice Form definition. From now on, the invoice form that you have designed will be used whenever the POS Invoices are printed.

For more information about designing or editing your Forms, please go www.hansamanuals.com or contact your local HansaWorld representative.

REPORTS

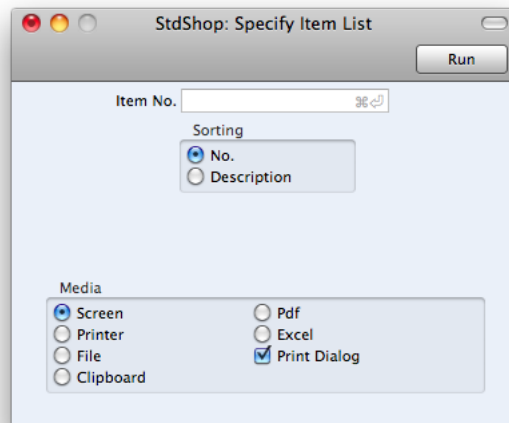
Company Info

Run this report to print your company details.



Item List

This report displays the Item Number, Name, Group, Unit, VAT Code and Price for each item.

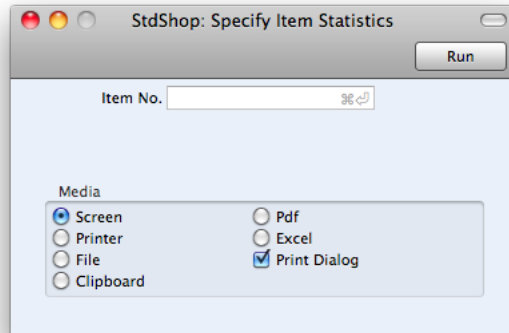


Leave all the fields blank if the report is to cover all the Items in the Item register, or use the item No. field to limit the report to a single Item, or range of Items.

Choose whether you want the items sorted by number or by description.

Item Statistics

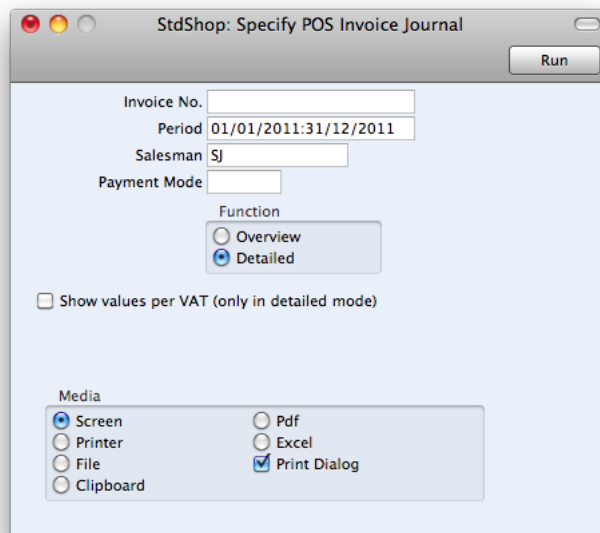
This report displays sales statistics for each Item, including turnover and quantity.



Leave all the fields blank if the report is to cover all the Items in the Item register, or use the item No. field to limit the report to a single Item, or range of Items.

POS Invoice Journal

This report is a chronological listing of the Invoices raised during a specified period. You can control the selection to show a range of Invoice Numbers or Invoices made by a certain Salesman.



Invoice No: Limit the report to a single or range of Invoices.

Period: Enter the report period. The first row of the Reporting Periods setting is used as a default.

Salesman: Specify a salesman.

Payment Mode: This option restricts the report to Invoices with a particular Payment Mode.

Function: Specify the level of detail required in the report here.

Overview: This choice gives a report with one row per Invoice, showing the Invoice Number, Date and Totals.

Detailed: In addition to the information shown above, this choice shows the individual items on each invoice.

Show values per VAT: With this option, report totals are shown per VAT code.

Printing reports

You can print any report to paper by clicking the Printer icon in the Button Bar of the window containing the report. The page format is set in advance for each report so that the report will fit in a portrait or landscape

page.

Searching in Reports

A useful function built in to every report when you print to screen in Standard Shop by HansaWorld, is the ability to search for a text string in a report. The search string may contain any combination of letters and digits occurring in the report.

Updating Reports

While a report is on screen, it may be that you change one or more of the records that contribute to the calculations. If so, there is no need to close and recreate the report. Simply select 'Recalculate' from the Operations drop-down menu (or use the CMD-Shift-R keyboard shortcut) to update the report. If you want to change the report criteria before recreating the report (e.g. you want to change the report period), choose 'Reopen Report Specification' instead.

SHUTTING DOWN, BACKING UP AND IMPORTING

Remember to make a back-up before shutting down Standard Shop by HansaWorld.

To shut down Standard Shop by HansaWorld, select 'Quit' from the Standard Shop menu. You can also use the CMD-Q keyboard shortcut. All open windows will be closed, and you will be asked if you want to keep any changes that have not yet been saved.

Backing Up

When the day's work with Standard Shop by HansaWorld is done, we advise you to make a back-up. It is a good idea to save a copy of the file on some external media and store it in a safe place. It might seem unnecessary to make a back-up every day, but the short time this takes is a good investment for the day something goes wrong with the hard disk.

To back up your data is particularly important when, as in the case of a Standard Shop by HansaWorld database, the financial information of your company is involved. If you should lose all your data, you will find yourself in a very awkward situation, missing all invoices, reports, etc. Name your copies systematically with dates so that you can easily restore the database, should an accident occur.

If you get a virus on your computer, you must first try to establish the date when your computer was infected. In this case, you must restore your data from a back-up created before the infection date. Otherwise you run the obvious risk of re-infecting the computer again.

Standard Shop by HansaWorld's method of back-up is fast and economical. The data is saved as a back-up file that takes up a minimal amount of space, and the back-up files are independent of the program versions. This is known as the "text back-up" method of backing up.

You must also carry out regular checks to make sure you can restore your database from the resulting back-up files or database copies.

To create a back-up, follow these steps:

1. Click the [Routines] button in the Master Control panel and then [Exports]. Alternatively, use the CMD-E keyboard shortcut. The Exports window is opened.
2. Double-click 'Database Text Backup'.
3. The 'Specify Text Backup' window appears. This offers you 40 characters with which to describe the back-up file that you are about to create. If it becomes necessary to restore from a back-up, this description will be shown in the list of importable files to help you select the correct one.

Enter an appropriate description and click [Run].

4. A dialogue box will open, allowing you to name and place the export file. Enter the name of the file in the filename area and locate it in the appropriate directory. The name of the back-up should include the date the back-up was made. For ease of importing later, it is recommended that you do not include spaces or other non-alphabetic characters in the name of your back-up file, and that you give it a .txt extension. Then, click [Save].

A message window informs you about the progress of the export.

When the export is finished, you are brought back to the 'Exports' list. Close it using the close box.

Note, under no circumstances should you edit or change a back-up file with another program.

Restoring from a Back-up

To restore from a back-up, you must first remove the program's database. Then, import the back-up file using the 'Import backup' function on the Welcome screen.

The replacement of a safety back-up is a non-destructive process, i.e. the back-up file is not affected by the reading process. This means that you can use the same back-up file more than once.

Restoring from a back-up is done in the following way:

1. Make sure the program "Standard Shop 6.3 UK" is not started on your computer.
2. Locate the file "Standard Shop 6.3 UK.hdf" on your hard disk. On a Mac this file will be found under /Users/"your user name"/library/Application support
3. Click once on the file while holding down the ctrl key on your keyboard, and choose 'Show Package Contents' from the subsequent menu.
4. The database is stored in the file hansa.hdb. Move this old database to another folder/directory or to an external media, to avoid mixing things up. Rename it so that you know what it contains.

5. Restart "Standard Shop 6.3 UK".
5. When the 'Welcome to Standard Shop' window appears, click the [Import Textbackup] button.
6. An import window opens up. Find your previously created Database Text Backup file (the back-up to which you wish to revert), highlight it and click [OK] (or double-click on the name of the file). The back-up data will be imported.
7. The select company window will appear, and you will be able to log on to your restored company.

Imports

The 'Imports' function allows you to import information from tab-delimited text files exported by other Standard databases or from other applications such as spreadsheets.

You can use this function when you need to restore from a back-up, or to import set-up information and base register data such as items or forms. You can also use this function to import data exported from other systems, after appropriate formatting.

To import a file you, click the [Routines] button in the Master Control panel. Then click the [Imports] button in the subsequent window. Alternatively, use the cmd-Shift-I keyboard shortcut. An 'Imports' list window appears. There are two import options: double-click one to activate it.

Automatic

If you choose this import function, you will get a list of available text files for import (files with the extension .txt). These files are located inside the application's package.

The left-hand column contains any Backup Comment that you may have inserted in a file if you created it by exporting from another database.

Double-click an item in the list to import it. The file will be imported automatically. A message window will inform you about the progress of the import.

Automatic, Manual file search

This function is similar to the Automatic import. The only difference is:

It allows you to import files from anywhere on your hard disk or on your network, while files imported by the 'Automatic' function have to be located inside the application's package.

It allows you to import files with any filename. The 'Automatic' function is restricted to files that have names that do not contain any spaces or other non-alphabetic characters and have .txt extensions.

Comments inserted in the back-up files are not visible when you use the 'Manual file search' function, so be certain that you are selecting the correct file to be imported. You can read these comments when you use the 'Automatic' import.

When you select this function from the 'Imports' list window, a standard 'Open File' system dialogue will open, allowing you to locate the file that you want to import.

APPENDIX

Terminology between different versions of English language

The language used in this material is British English. There can be slight differences between other versions of the English language, which can lead to confusions. This table should help to clear these up. Sorted alphabetically.

British	USA	Canada	Australia + New Zealand	Singapore
Cheque	Check	Cheque	Cheque	Cheque
Colour/coloured	Color/colored	Colour/coloured	Colour/coloured	Colour/coloured
Credit Note(CN)	Credit Memo (CN)	Credit Memo (CM)	Credit Note (CN)	Credit Note (CN)
Dialogue	Dialog			
Instalment	Installment			
Jewellery	Jewelry	Jewellery	Jewellery	Jewellery
Licence (noun)	License	Licence	Licence	Licence
Mileage Claim	Miles	Way Lists	Mileage Claim	Mileage Claim
Miles	Miles	KM	KM	KM
Mobile	Cell	Mobile	Mobile	Mobile
Nominal Ledger (NL)	General Ledger (GL)	General Ledger (GL)	General Ledger (GL)	General Ledger (GL)
Post Code	ZIP Code	Post Code	Post Code	Post Code
Purchase Ledger	Payable (PL = AP)	Payable (PL = AP)	Purchase Ledger	Purchase Ledger
Sales Ledger	Receivable (SL=AR)	Receivable (SL=AR)	Sales Ledger	Sales Ledger
Salesman	Salesperson	Salesperson	Salesman	Salesperson
Stock	Inventory	Inventory	Stock	Inventory
Stocktake	Inventory Count	Inventory Count	Stocktake	Inventory Count
Stock Depreciation	Inventory Adjustment	Inventory Adjustment	Stock Depreciation	Inventory Adjustment
Supplier	Vendor	Vendor	Supplier	Vendor
VAT	Sales Tax or Tax	Tax (ideally GST/PST)	GST	GST/SST/HST