Standard POS
by HansaWorld

Integrated Point of Sales System for Mac OS X

Preface

Standard POS is a powerful point of sales system for small shops and retail outlets for Mac OS X.

Text in square brackets - [Save], [Cancel] - refers to buttons on screen.

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Introduction and Installation

Standard POS is an integrated point of sales tool for small shops and retail outlets for Mac OS X. It allows you to process each sale from start to finish using a single window, including listing the items, receiving payment and printing the receipt.

In this manual, we will first describe the steps you need to follow to get started with Standard POS. Topics covered include installation and the creation of a new database. We will then cover the working environment in Standard POS, its structure and the way information is handled, and starting work. The remainder of the manual describes the settings, used to define preferences and look-up information, the individual registers in detail, printing documents and reports and, finally, exporting and importing.

For more information and support, please visit http://support.hansaworld.com/, where you will find an FAQ page and a support forum.

System Requirements

Standard POS requires Mac OS X 10.6 or later.

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

Installation

To install Standard POS, follow these steps—

1. Locate and purchase Standard POS in the Mac App Store.

2. Standard POS 6.3 UK will be downloaded and installed in your 'Applications' folder automatically.

3. After installation, Standard POS will be launched automatically, and the 'Welcome' window will be opened—
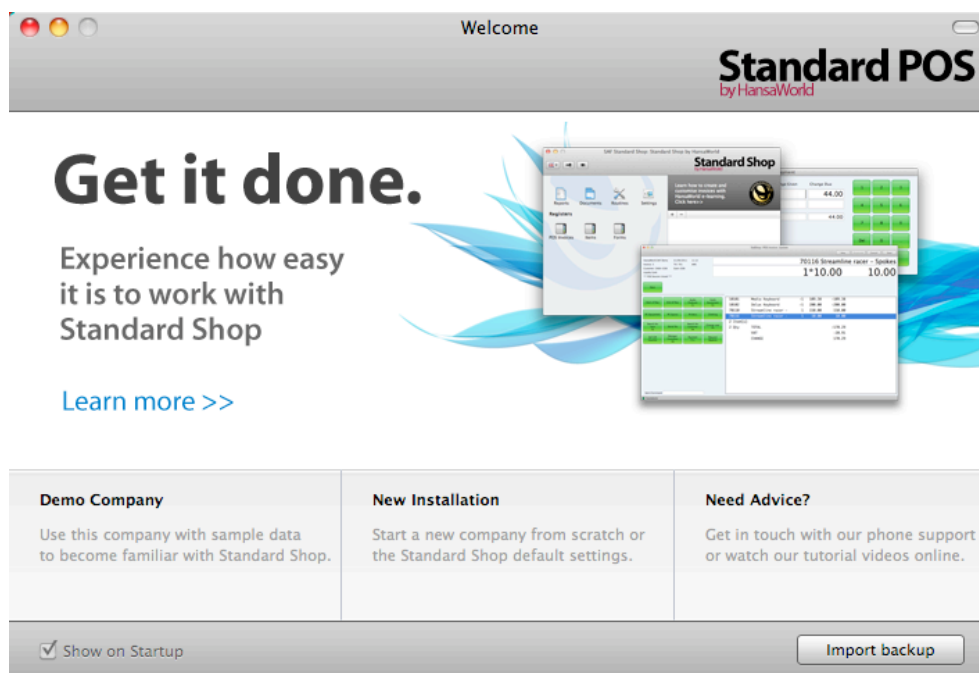
Where to go now?

Please click for more details about—

Starting Standard POS – Demo Company

1. Start Standard POS by double-clicking the application icon. The first window to appear will ask how you want to use the application—
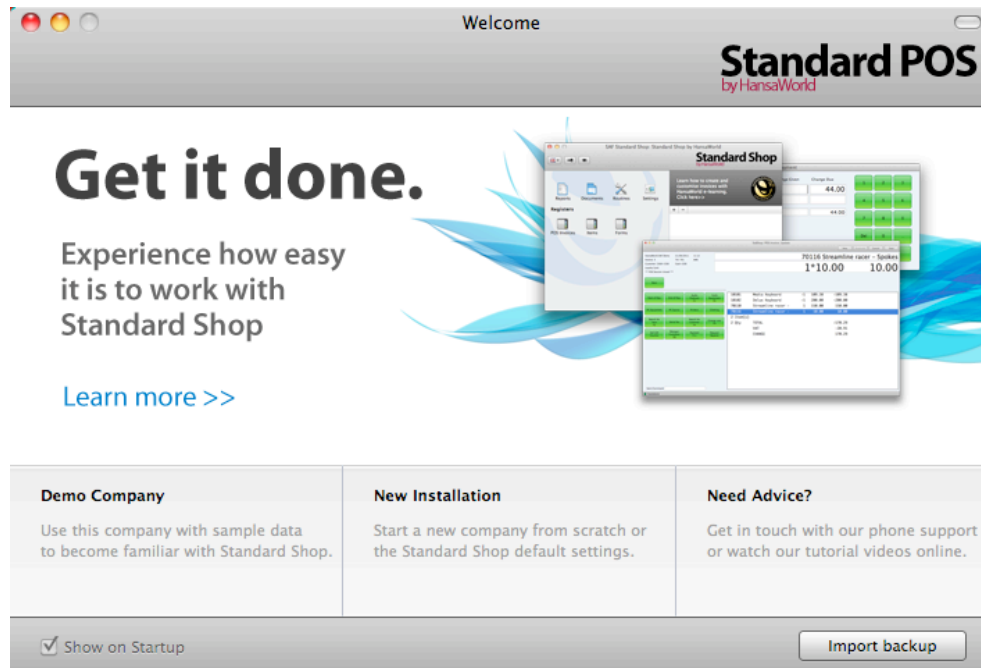
2. Click one of the buttons as follows—

    Demo Company   Click this button if you are new to Standard POS and would like to explore the application to see how closely it will satisfy your requirements. This is described in the remainder of this section.

    New Installation   Click this button if you are starting Standard POS for the first time and you want to create a new database for your own data. This is described in the 'Starting Standard POS - New Installation' section below on page 10.

    Import Backup   Click this button if you have already been using Standard POS and you need to import a back-up file to a new database. This is described in the 'Restoring from a Back-up' section below on page 92.

3. Click the [Demo Company] button. Demonstration data will be imported, and you will be logged in to the demo installation automatically.

    The Master Control panel will appear, as illustrated below on page 13.

Where to go now?

Please click for more details about—

Where to go now?

Starting Standard POS – New Installation

1. Start Standard POS by double-clicking the application icon. When the 'Welcome' window appears, click the [New Installation] button.

2. The 'Create a new Company' window will appear—

Enter your company details in the upper section. You must enter a Company Name, an e-mail address and a company registration number. The other information is optional, but it is recommended that you enter your address so that it can be printed on Invoices and other documentation.

The information in the lower section will be used to create a User Account for yourself. You must enter your Name and a Signature before you can progress to the next step, but the other information is optional. The Signature is the ID code that you will use to log in to Standard POS.

When the window is complete, click the [Create] button in the bottom right-hand corner of the window.

3. A window will appear, asking you to register your copy of Standard POS—

You must register if you will want to use In App Purchases. Otherwise, there is no need. Click one of the buttons as follows—

Register this Product

Click this button to register the application. Then follow the on-screen instructions.

Register Later   Click this button to register the application later. You will be given a reminder in 30 days' time. To register at any time, click the [Routines] button in the Master Control panel and then [Registration].

Don't Register   Click this button if you don't want to register the application. You will be given a reminder in six months' time. If you change your mind and decide to register, click the [Routines] button in the Master Control panel and then [Registration].

4. The 'Login' window appears—
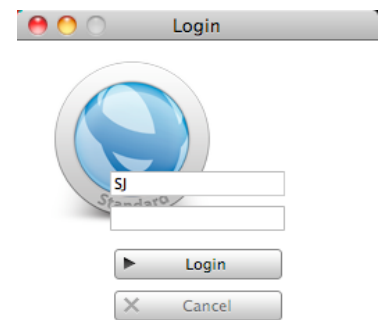
Enter your Signature (i.e. your log-in ID) and your Password if you specified one and click [Login] (or press the Enter key).

5. If you specified a Password in step 2, you will be asked if you want Standard POS to remember your Signature and Password, so that you do not have to enter them yourself each time you log in.

Bearing in mind that the Password is a security feature, it is recommended that you only click the [Yes] button if you are absolutely sure no-one other than yourself will have access to your computer. Whichever option you choose, you will be able to change it later if necessary.

6. If you did not specify a password in step 2, you will now be asked to do so—

Enter the Password in the New Password and Retype New Password fields and click [Save].

7. The Master Control panel will appear, as illustrated below on page 13.

8. The 'Welcome' window will continue to appear each time you start Standard POS. You can click [Existing Installation] or [Demo Company], depending on whether you want to work in your own database or try something new in the demo database. When you no longer need the demo database, remove the tick from 'Show on Startup' in the 'Welcome' window. From now on, the 'Welcome' window will no longer appear when you start Standard POS.

Where to go now?

Please click for more details about—

Master Control Panel

The Master Control panel is the main tool palette in Standard POS—
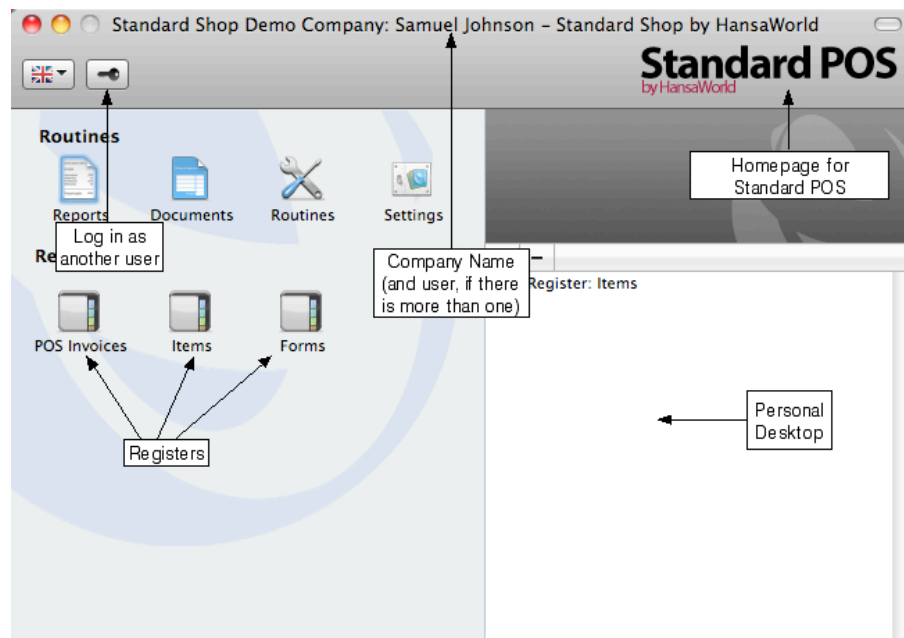
You can open the Master Control panel or bring it to the front at any time using the ⌘-M keyboard shortcut.

The tools in the Master Control panel are described in the relevant sections in this manual.

Where to go now?

Please click for more details about—

Configuring a New Database

Configuring a new database includes the following tasks—

Entering Your Company Details

You should already have entered your company name and other details (step 2 in the 'Starting Standard POS - New Installation' section above on page 10). If the information you entered was incomplete, or you made a mistake, you can update it at any time. You should always ensure this information is complete and up to date, as it will be printed on documents such as Invoices. Follow these steps—

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

2. Double-click 'Company Info' in the list. The 'Company Info: Inspect' window will appear—

3. Enter your company address and other information as appropriate.

4. Click the button marked "Reg. No." towards the top centre of the window to see the other important fields in this setting.

Here you can enter your company and VAT registration numbers—

5. 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.

Where to go now?

Please click for more details about—

Working with Records

Registers

Standard POS contains a number of registers in which information of a particular type is stored. For example, information about Items is stored in an Item register.

You can open a register using the buttons in the Master Control panel, or using a keyboard shortcut. For example, use ⌘-1 to open the first register (POS Invoices), ⌘-2 for the second register (Items), and so on.

Browse Windows

When you open a register, a browse window will open, listing all the existing records in the register.

For example, in the Sales Ledger, if you click the [POS Invoices] button in the Master Control panel or use the ⌘-1 keyboard shortcut, the window that opens is a browse window, entitled 'POS Invoices: Browse'. This window lists all the POS Invoices in the register—
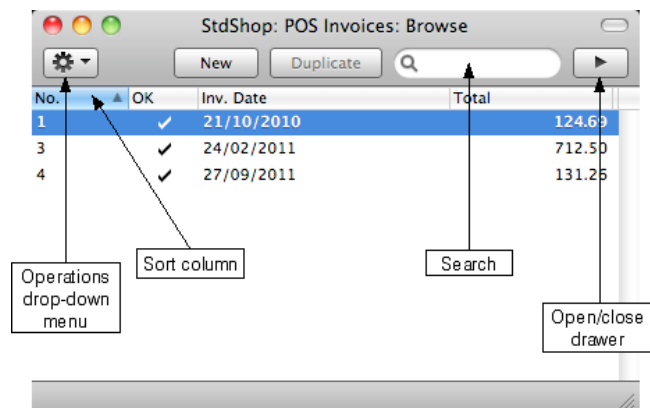
Browse windows offer the following features—

Sorting Click a column heading to sort the list. Click again to reverse the sort. The sort column has a blue heading, and an arrow indicates the sort direction.

Adjusting Columns

Drag the column headings to change the order of the columns.

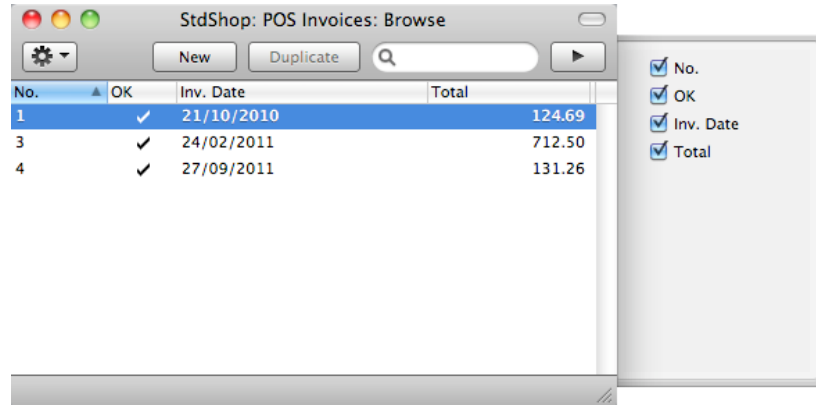To remove a column from a browse window, open the drawer by clicking the [▶] button in the top right-hand corner of the window—

Remove the tick from a check box to remove the corresponding column from the browse window.

Saving Window Configurations

If you move or resize a window or change the sort order and you want the change to be remembered, choose 'Save Position' from the Window menu (you can also use the ⌘-Shift-S keyboard shortcut). Use 'Restore Position' to return the window configuration to standard.

Searching

To find a particular record in the list, first sort the list by the column that you want to use for the search. In the illustration above, for example, the list is sorted by No. allowing you to search for an Invoice with a certain Number. Then, type a letter, word, number, or date in the Search field (there is no need to click in the field before typing). Then press the Enter key.

Many browse windows include an Operations drop-down menu. Highlight one or more records in the list (hold down the Shift key while clicking), then click the button with the image shown on the left to open the menu. When you choose a function from this menu, it will be applied to every highlighted record.

Opening a record

Open a record by double-clicking, or by selecting the line and pressing the Enter key. The record will be opened in a record window.

Duplicating a record

Find the record that you want to duplicate, highlight it and click the [Duplicate] button above the list (or use the ⌘-Y keyboard shortcut). A record window will open, containing the new duplicate record. In many cases, the new record will contain the current date, not the date of the duplicated record.

Creating a new record

Click the [New] button above the list, or use the ⌘-N keyboard shortcut. A record window will open, containing a blank new record.

Record Windows

Note: the description below does not apply to the POS Invoice record window. Please refer to page 31 below for details of this window.

You will use record windows to enter, view and edit individual records. All data entry will be made in windows of this type. Shown below is an Item in a record window—

Use the Return, Tab or arrow keys to move from field to field. You can also use the mouse to click directly in a field.

The window title will contain the name of the register and will also show the status of the record, as follows—

New	The window contains a new record that has not yet been saved.
Inspect	The window contains a record that has been saved.
Update	The window contains a saved record, and a change has been made to that record that has not yet been saved.
Deleting	The window contains a record that is in the process of being deleted.

Record windows offer the following features—

◄ ►   Keyboard shortcuts: ⌘-- and ⌘-+

These are the [Previous Record] (on the left) and [Next Record] buttons.

Use these buttons to move from record to record. Everything you may have changed in the record you are leaving will be saved.

⚙▾   Some record windows have an Operations drop-down menu, marked with this icon. This contains various functions that you can apply to the record currently shown in the window.

[New]	Keyboard shortcut: ⌘-N
	Click this button to save the current record and to close it. A new blank record will then be opened for data entry.
[Duplicate]	Keyboard shortcut: ⌘-Y
	Click this button to save the current record and to create a copy of it. The original record will be closed and the new copy opened. In many cases, the new record will contain the current date, not the date of the copied record.
[Cancel]	If you have not saved the current record (i.e. the window title is 'New'), click this button to cancel the data entry process and to close the record window. The record will not be saved. If you have previously saved the current record (i.e. the window title is 'Update'), click this button to discard all changes made since it was last saved. In this case, the record window will not be closed.
[Save]	Keyboard shortcut: Shift-Enter
	This button saves all changes to the current record but does not close it.
🎓	Click this button to connect to the Standard POS website, where you can see a short tutorial demonstrating how to use the register you are looking at.

Paste Special

You can use the 'Paste Special' feature in many fields to bring information in to a record from another register or setting. For example, when you enter an Item, you can use 'Paste Special' to choose an Item Group or VAT Code. The following example shows pasting an Item Group into an Item—
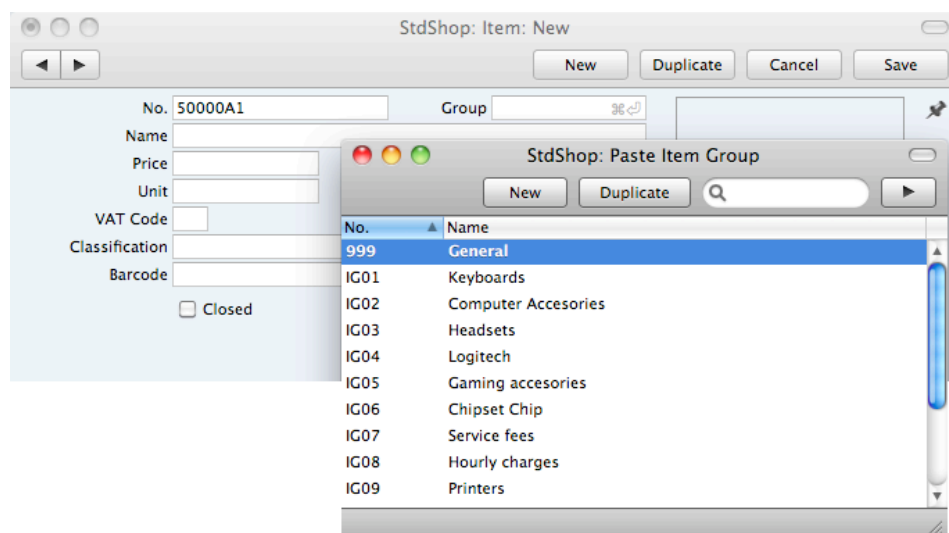
Place the insertion point in the Group field and press the ⌘-Enter key combination. A new window will open, showing the contents of the register or setting from which you can select a record (in this case, the window will list Item Groups). This window is similar to a browse window in its behaviour, so you can sort and search as previously described. Select the Item Group you want by double-clicking or by highlighting and pressing Enter. The Item Group will be transferred to the Invoice.

When you move the insertion point into an empty field where you can use the 'Paste Special' feature, you will see the following image in the field—

You can make the 'Paste Special' feature more powerful by saving the sort order of the 'Paste Special' list. For example, whenever you need to choose an Item Group, you will probably know its Name but not its Number. The first time you use the 'Paste Special' feature to choose an Item Group, sort the list by Name and then select 'Save Position' from the Window menu. From now on, the list will be sorted by Name when it opens. Now you can type the first few characters of the Item Group Name in an Item Group field and then press ⌘-Enter. When the 'Paste Special' list opens, the highlighted Item Group will be the first one to match the typed characters. If this is the correct one, all you need do is press the Enter key and carry on typing without interruption. In the example shown below, we typed "keyb" into the Item Group field in an Item record and then pressed ⌘-Enter. The 'Paste Special' list opens, with the first Item Group whose name begins with "keyb" highlighted—
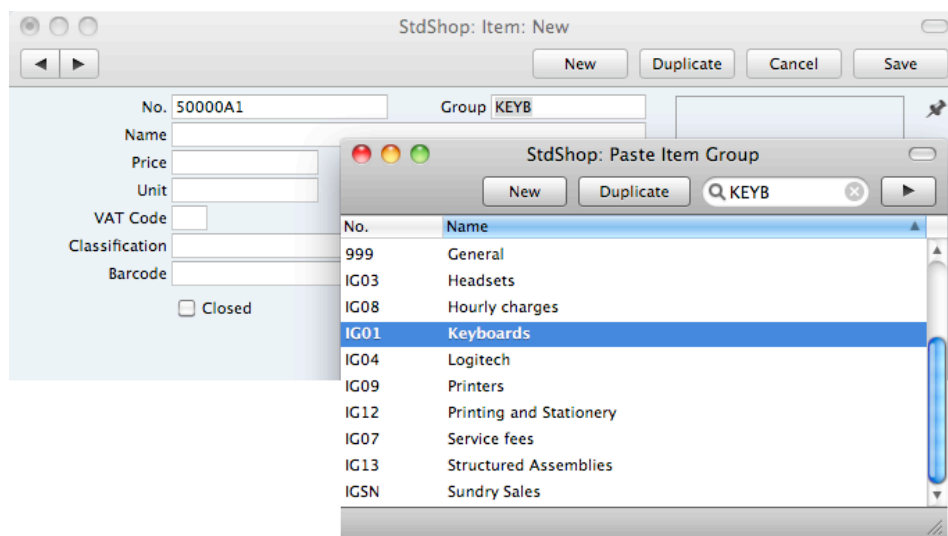
If the record you are looking for does not exist and so is not shown in the 'Paste Special' list, you can often enter it on the fly. In the 'Paste Special' window, press ⌘-N, or click the [New] or [Duplicate] buttons as appropriate (or use the relevant keyboard shortcuts, ⌘-N and ⌘-Y respectively). A new Item Group screen (in this example) will be shown. Enter the new Item Group, click [Save] and the new record will be saved. At the same time, the Item Group Number will be entered in the Item record.

If you realise that your information about a linked record (in this case, the Item Group) is out of date or contains a mistake, highlight the Item Group in the 'Paste Special' window and press ⌘-Shift-V. The Item Group record will be opened, allowing you to make the necessary changes. You can also do this if you have already entered the Item Group in the Item. With the insertion point in the Item Group field, press ⌘-Shift-V. This feature is available from most fields with a 'Paste Special' link.

You can also drag and drop records from a browse window or 'Paste Special' list onto a record window. For example, you can drag an Item Group Number from the 'Item Groups: Browse' or the 'Paste Item Group' window into an Item record.

You can also use 'Paste Special' when you are in a date field to choose a date from a calendar.

Deleting Records

To delete a record, open it in a record window and select 'Delete' from the Record menu.

You cannot delete a record that is used by other transactions, such as an Item that has been used in a POS Invoice.

!   ***You cannot undo the deletion of a record.***

Attachments and Personal Desktop

Attachments

You can connect files, notes or other records to any record in Standard POS. These connected objects are known as "Attachments".
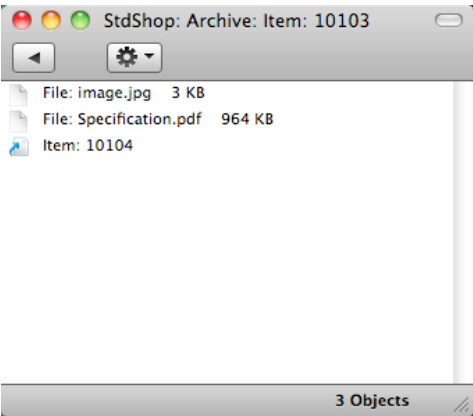
All record windows contain an [Attachments] button in the top right-hand corner—
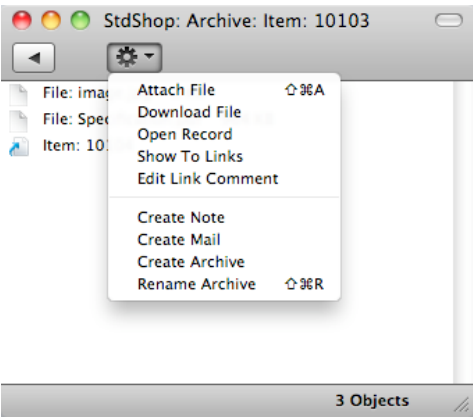
If a record has at least one Attachment, the button has a different icon—

Click this button to work with Attachments. 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.
Reports	To attach a report to a record, first print the report to screen. The Button Bar of the report window contains an [Attachments] button: drag this to the [Attachments] button of the 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-clicking it to save it to your hard disk or use 'Open Record' to open it in the relevant application.
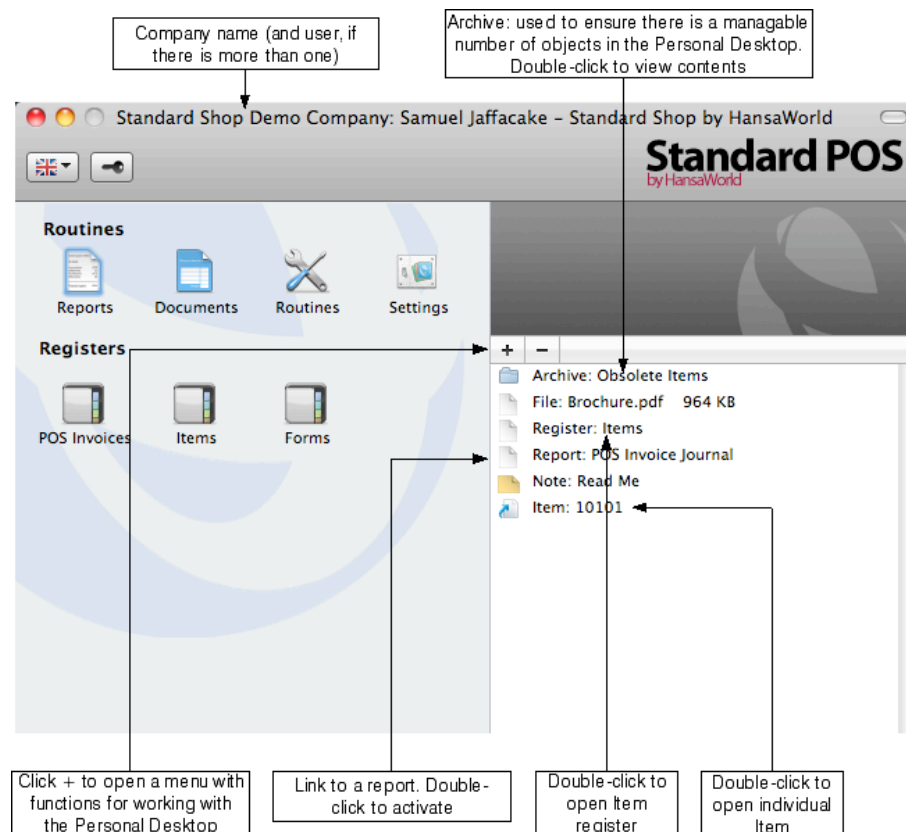
If a record has many Attachments, you can organise them using Archives. Open the list of Attachments and select 'Create Archive' from the Operations menu. The 'Create Archive' window opens, where you can give the new Archive a name. When you click the [Save] button, the new Archive will appear at the 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 or press the Backspace key on your keyboard.

Personal Desktop

As well as being able to connect files, notes or records to any record in Standard POS (as described immediately above), you can also attach them to your Master Control panel. They will be listed in the area on the right of the Master Control panel, known as the "Personal Desktop". You can also place important reports, documents, settings and registers in the Personal Desktop. You can therefore configure your Personal Desktop so that it gives you immediate access to the areas of Standard POS that are most important to you (i.e. removing the need to find reports, documents and settings in list windows and records in browse windows). The Personal Desktop is therefore similar to a list of Bookmarks in a browser.

Company name (and user, if there is more than one)

Archive: used to ensure there is a managable number of objects in the Personal Desktop. Double-click to view contents

Click + to open a menu with functions for working with the Personal Desktop

Link to a report. Double-click to activate

Double-click to open Item register

Double-click to open individual Item

When you click the [+] button immediately above the Personal Desktop, a drop-down menu will appear, containing various functions that you can use when working with the Personal Desktop, as illustrated below—
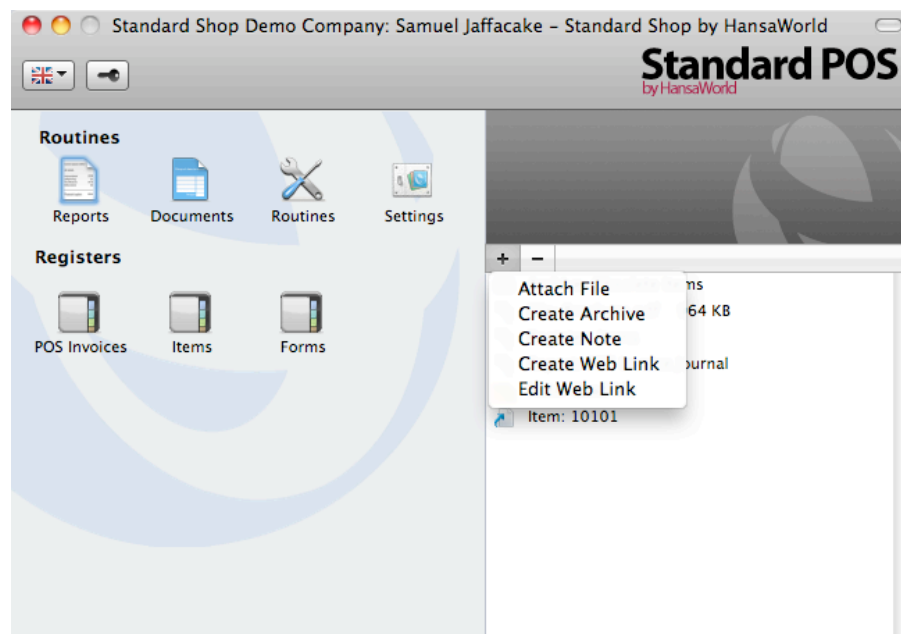
You can place the following items in your Personal Desktop—

Registers   Drag registers from the Master Control panel 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.

Web Links   You can place links to web pages in your Personal Desktop. 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 specify a name for the link and the URL (web address). You should also choose "Inline" or "External" in the Open field, using 'Paste Special'. If you choose "Inline", the web page will be opened in a new window inside Standard POS when you double-click the web link. If you enter "External", the web page will be opened in your default browser.

To remove an item from your Personal Desktop, click on it and click the [-] button above the Personal Desktop. You can also choose 'Clear' from the Edit menu, or press the Backspace key on your keyboard.

The contents of your Personal Desktop cannot be viewed by another user. So, if someone else logs in to your Standard POS database 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 Person 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.

Items

Introduction

Use the Item register to store information about the products and services that you sell.

You can group Items of a similar type together using Item Groups. You will often be able to report on the Items belonging to a particular Item Group. Before entering Items, therefore, it is recommended that you enter some Item Groups. Item Groups are described below on page 62.

Before working with Items, you should also look at the following settings—

Entering an Item

To open the Item register, click the [Items] button in the Master Control panel or use the ⌘-2 keyboard shortcut. The 'Items: Browse' window will be opened, listing the Items you have already entered. To create a new Item, click the [New] button above the list or use the ⌘-N keyboard shortcut. Alternatively, highlight an Item similar to the one you want to enter and click [Duplicate] (or use ⌘-Y).
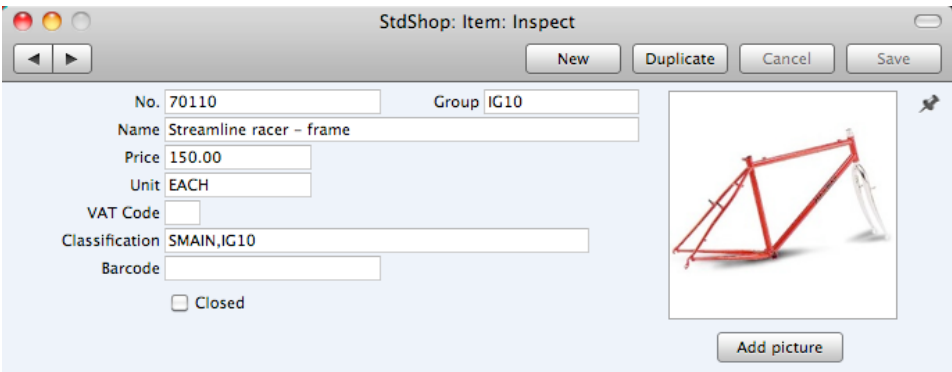
The 'Item: New' window will open, empty if you clicked [New] or containing a duplicate of the highlighted record. Complete the Item record as appropriate and as described below, then save it using the [Save] button and close the window by clicking the close box. Then, close the browse window using the 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. Once you have saved the Item record, you will not be able to change the Item Number.

Group   **Paste Special**   Item Groups setting

Enter the Item Group to which this Item belongs. Item Groups enable you to classify similar Items together. Each Item belonging to the same Group can use the same

default VAT Code, saving you the work of having to specify this for each Item individually.

Name   Enter the name or a short description of the Item.

Price   **Used as default in**   POS Invoices

Enter the normal sales price for the Item here. The price should include VAT if you have specified in the Invoice Settings setting that prices include VAT.

Unit   **Paste Special**   Units setting

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

VAT Code   **Paste Special**   VAT Codes setting

The VAT Code will determine the rate at which VAT will be charged whenever you sell the Item. The default VAT Code will be chosen in this order—

1.   It will be taken from this field in the Item record.

2.   It will be taken from the Item Group to which the Item belongs.

3.   The VAT Code in the Invoice Settings setting will be used.

Classification   **Paste Special**   Item Classifications setting

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

Barcode   Record the Item's Barcode here.

Providing the Barcode does not clash with your Item Numbers, you can enter it instead of the Item Number whenever you need to add the Item to a POS Invoice. If you have a barcode scanner, you can also add Items to POS Invoices by scanning their barcodes.

Closed   Check this box if the Item is no longer to be used (you cannot delete an Item altogether if you have used it in a POS Invoice). You will not be able to use a closed Item in POS Invoices. You can re-open a closed Item at any time.
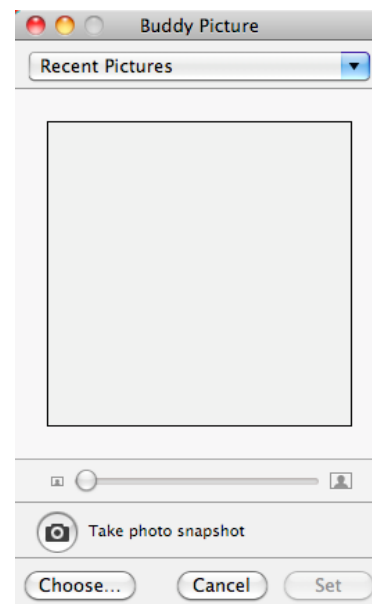
Picture, [Add picture]

You can attach pictures to records in the Item register. Follow these steps—

1. Open the record in question. The record must already have been saved at least once (i.e. the window title must be 'Inspect' or 'Update').
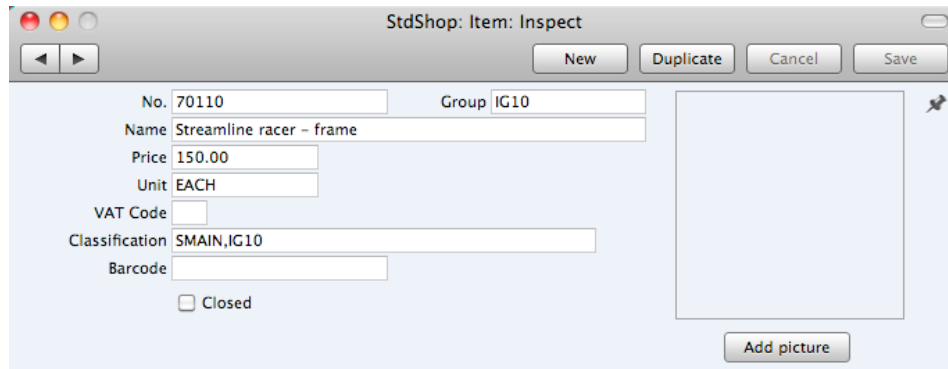
2. Click the [Add picture] button underneath the picture field. The 'Buddy Picture' window opens—

3. If the picture is already on your hard disk, click the [Choose] button to locate it. It must be a .jpg file. 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).

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

An alternative method is to use the Attachments facility, as follows—

5. Click the [Attachments] button (with the drawing pin icon). A list of objects currently attached to the record is opened.
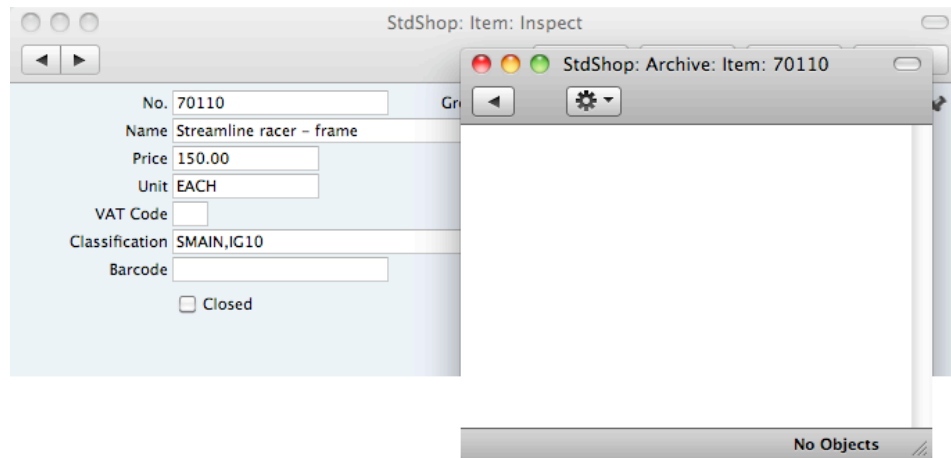
6. Choose 'Attach File' from the Operations menu of this list.
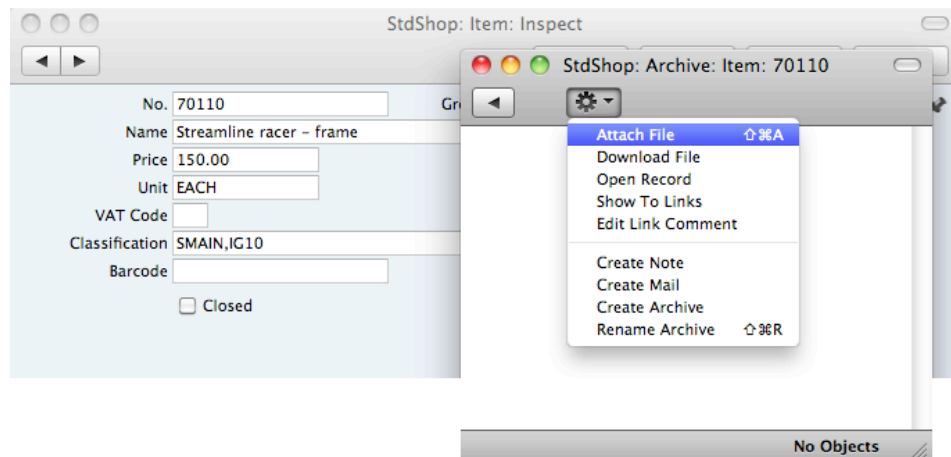
7. Locate the picture file on your hard disk and click [Open]. The picture will be attached to the record. It must be a .jpg file. The maximum picture size is 280 x 280 pixels: larger pictures will be cropped.
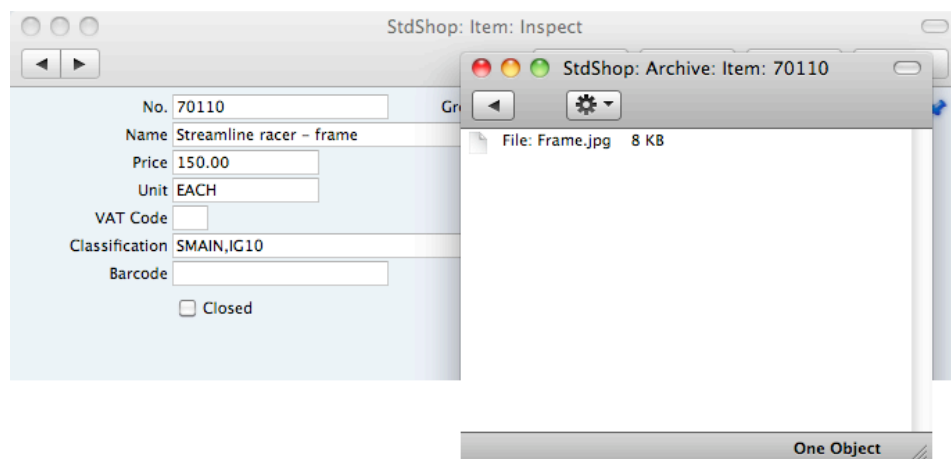
8. Whichever method you use ([Add picture] or adding an attachment), the picture will appear in the Item record. You may need to close and reopen the record to see it—

Editing an Item

To edit an Item, open the Item register by clicking the [Items] button in the Master Control panel.

The 'Items: Browse' window opens, listing the Items in Item Number order. Change the sort order by clicking on one of the column headings: the blue heading shows the current sort order.

To search for a specific Item, first sort the list by the column that you want to use for the search. Then, enter the text that you want to find in the Search field in the top right-hand corner of the window and press Return. For example, to search for a particular Item Name, sort by Name before entering a Name (or its first few characters) in 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 changes.

Deleting an Item

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.

You cannot delete an Item if you have used it in a POS Invoice.

!

You cannot undo the deletion of an Item.

POS Invoices

Introduction

The POS Invoice interface is designed to allow the quick and easy registration of sales, by touch if you will be using Standard POS on a machine with a touch-screen. Different companies will have different requirements for the tools and functions that their cashiers should use. To allow for this, the placing of tools and functions in the POS Invoice window is fully user-customisable.

This description of POS Invoices is divided into the following sections—

Before working with POS Invoices, you should also look at the following settings and registers—

Placing tools and functions in the POS Invoice window

Illustrated below is the POS Invoice window as it will appear in a new installation of Standard POS—
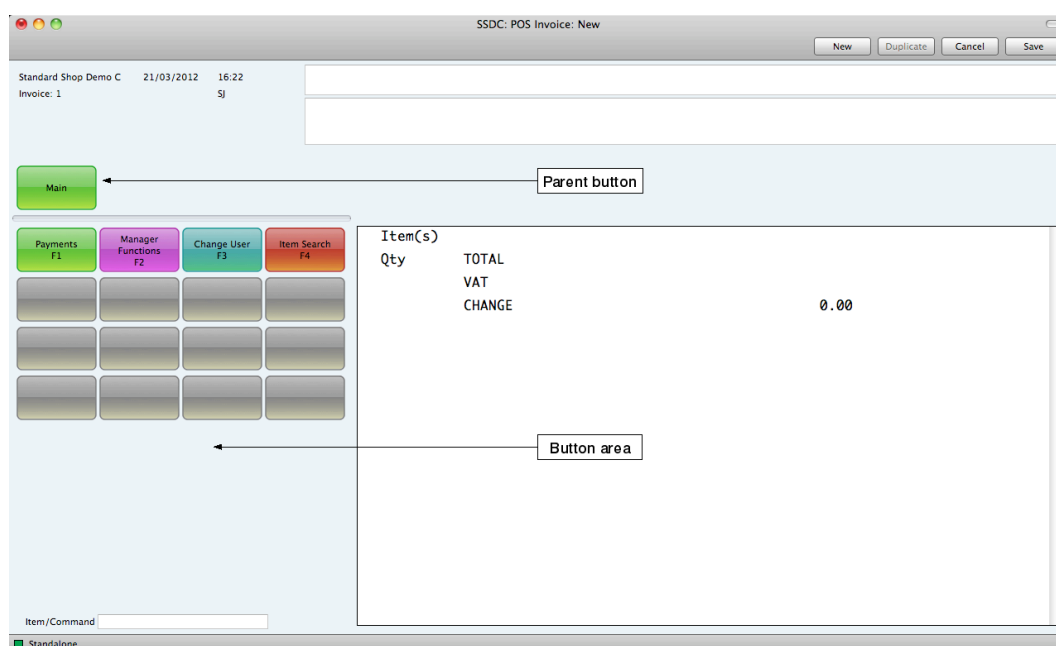
As shown in the illustration, the POS Invoice window contains an area where you can place buttons for the tools and functions that you need. This area is termed

the "button area" in this documentation. In this illustration, the button area contains four active buttons (marked "Payments", "Manager Functions", "Change User" and "Item Search") and several grey dummy buttons. You can keep these buttons as they are, or you can change them to suit your requirements.

You are not limited to the number of buttons that will fit in the button area. If you need more buttons, you can create several sets of buttons. Each button can therefore perform one of two operations—

- It can activate a particular function (in the illustration, "Change User" and "Item Search" are examples); or

- It can replace the currently visible set of buttons with a different set (in the illustration, "Payments" and "Manager Functions" are examples).

You should spend some time planning the structure of your sets of buttons. When you create a new POS Invoice, you will need buttons representing the most important and commonly-used tools and functions to be visible immediately. For example, you might need buttons to activate cash and credit card payments always to be available. But, if you will add Items to POS Invoices by scanning the Items' barcodes, then a button that you will use to find Items by Item Number or Name will be less necessary and won't need to be visible immediately.

Above the button area, there is a single "parent button" (marked "Main" in the illustration). If you click a button such as "Payments" in the example, the currently visible set of buttons will be replaced with a different set. A second parent button will appear, whose label will remind you which set of buttons you are using. This situation is illustrated below—
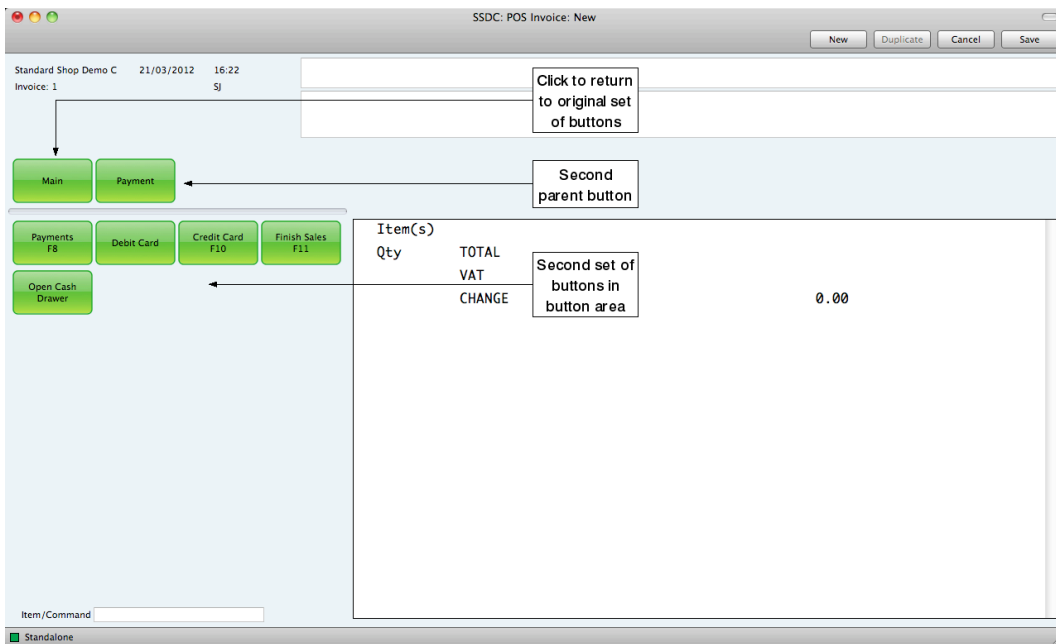

The "Main" button will remain: click this button to return to the original set of buttons.

The button definitions are contained in the POS Buttons setting. This setting will contain a separate record for each set of buttons (a set of buttons is sometimes known as a "button page").
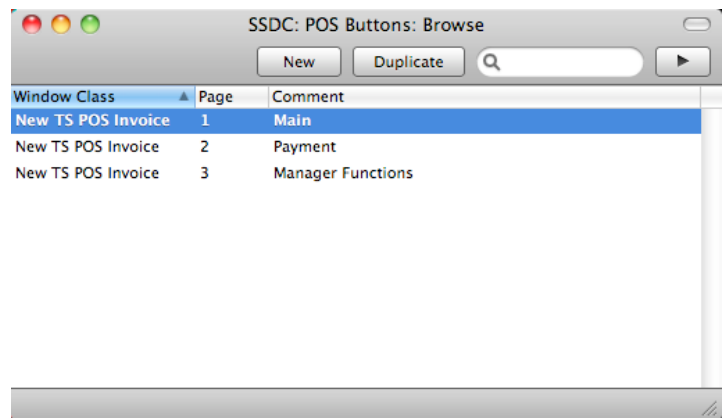
To add a function to the first dummy button, follow these steps—

1. Open the Master Control panel using the ⌘-M keyboard shortcut, and then click the [Settings] button. Alternatively, use the ⌘-S keyboard shortcut. In both cases, the 'Settings' list opens—
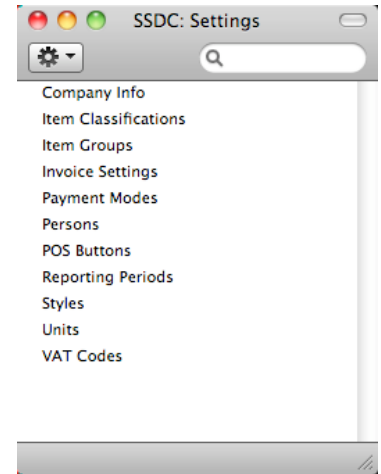
2. Double-click 'POS Buttons' in the list. The 'POS Buttons: Browse' window opens, listing the three records that already exist—

The first record in this list (with "1" in the Page column) contains the set of buttons that you will see when you open a new POS Invoice. For this reason, you must have a POS Button record in which the Page is "1" (sometimes described as the "Page 1" record in this documentation). At the moment, this record contains the four active buttons and several dummy buttons shown in the illustration above on page 31.

The other two records contain secondary sets of buttons. For example, the second record contains the set of buttons that will be shown when you touch or click "Payments" on the first page. These two records have arbitrary but unique values in the Page column ("2" and "3").

3.   Double-click the first record in the list to open it—

	Button Type	Code	Colour	Key	Key Modifiers	Label
1	Display Page	2	Green	F1	–	Payments
2	Display Page	3	Pink	F2	–	Manager Functions
3	Change User		Blue	F3	–	Change User
4	Item Search		Red	F4	–	Item Search
5	Blank		Gray	–	–	
6	Blank		Gray	–	–	
7	Blank		Gray	–	–	
8	Blank		Gray	–	–	
9	Blank		Gray	–	–	
10	Blank		Gray	–	–	
11	Blank		Gray	–	–	
12	Blank		Gray	–	–	
13	Blank		Gray	–	–	
14	Blank		Gray	–	–	
15	Blank		Gray	–	–	
16	Blank		Gray	–	–	
17						
18						
19						
20						
21						
22						
23						

Page: 1
Comment: Main   Key: –   Modifiers: –

The top part of the window (the "header") contains four fields that relate to the POS Button record as a whole. The majority of the window contains a matrix in which the individual buttons are listed, one row for each button.

4.   If you need to change the header information (or are entering a new POS Button record), complete the four header fields as follows—

Page
Use this field to assign a unique identifying code to the POS Button record.

In most cases, you can use an arbitrary code. However, you must have one POS Button record in which the Page is "1" (i.e. a "Page 1" record), as shown in the illustration. This will contain the buttons that will be displayed in new POS Invoices.

Comment
This Comment will be used as the button label for the parent button (the button above the button area). In this example, the button label will be "Main", as shown in the illustration of the POS Invoice window above on page 31.

Key, Modifiers   **Paste Special**   Choice of possible entries

As an option, use the Key field to specify a Function Key that you can use to activate the set of buttons. In practice, it is only useful to do this in the "Page 1" set of buttons, because the Page 1 parent button is always visible and therefore the Function Key will always be active.

Be sure to choose a Function Key that isn't already used by the operating system. If necessary, add a Modifier to the Function Key (e.g. Cmd or Shift).

5. Use the matrix that takes up the majority of the 'POS Button: New' window to list the buttons that you want to be included in the set of buttons. In the "Page 1" POS Button record, these are the buttons that will be shown each time on opening a new POS Invoice.
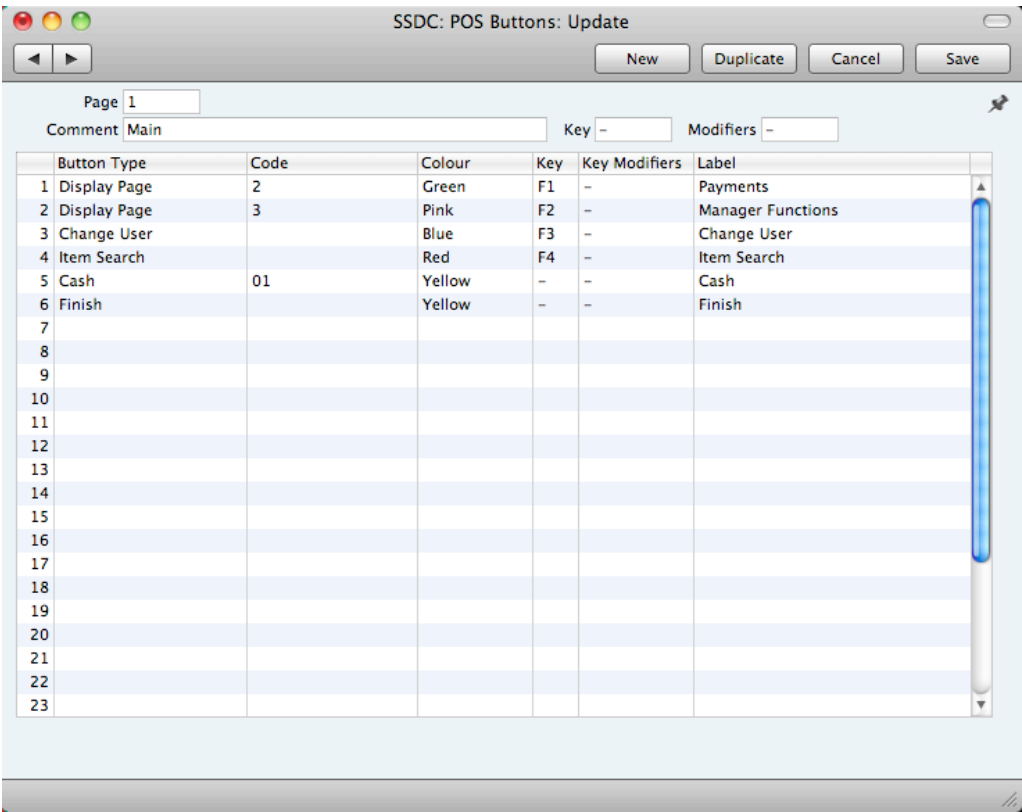
The buttons will be shown in the POS Invoice in the order in which you list them in the POS Button record. The first four buttons in the list in the POS Button record will appear in the first row of buttons in the POS Invoice, and so on.

To add a button, click in any field in the first blank row and enter an appropriate value. To remove a button, click on the row number on the left of the row and press the Backspace key. To insert a button, click on the row number where the insertion is to be made and press Return.

To assign a function to the first dummy button in the example, change the attributes in the relevant row in the matrix (row 5 for the first dummy button) as follows—

Button Type   **Paste Special**   Choice of possible entries

Use 'Paste Special' to specify the task or function that should be carried out when you touch or press the button. Please refer to the 'Available Tools and Functions (POS Button Types)' section below on page 37 for descriptions of each option.

Code   **Paste Special**   Depends on Button Type

Depending on the Button Type you have chosen in the field to the left, you may need to make an entry in this field. For example, if the Button Type is "Display Page", use this field to specify the page that is to be displayed when you touch or press the button. If the Button Type is "Cash" or "Credit Card", use 'Paste Special' to choose a Payment Mode for the payment. Please refer to the 'Available Tools and Functions (POS Button Types)' section below on page 37 for details.

Colour   **Paste Special**   Choice of possible entries

Enter the colour of the button, as it will appear in the POS Invoice window.

Key, Key Modifiers Paste Special   Choice of possible entries

As an option, use the Key field to specify a Function Key that you can use instead of touching or pressing the button.

Be sure to choose a Function Key that isn't already used by the operating system. If necessary, add a Modifier to the Function Key (e.g. Cmd or Shift).

Label   Enter the name of the button, as it will appear in the POS Invoice window.

In the illustration below, we have replaced the first two dummy buttons with a "Cash" button and a "Finish" button, and removed the other dummy buttons—

6. To save the POS Button record, click the [Save] button in the top right-hand corner of the window, or use the Shift-Enter or Shift-Return keyboard shortcuts.

7. The new buttons will appear in the next new POS Invoice—
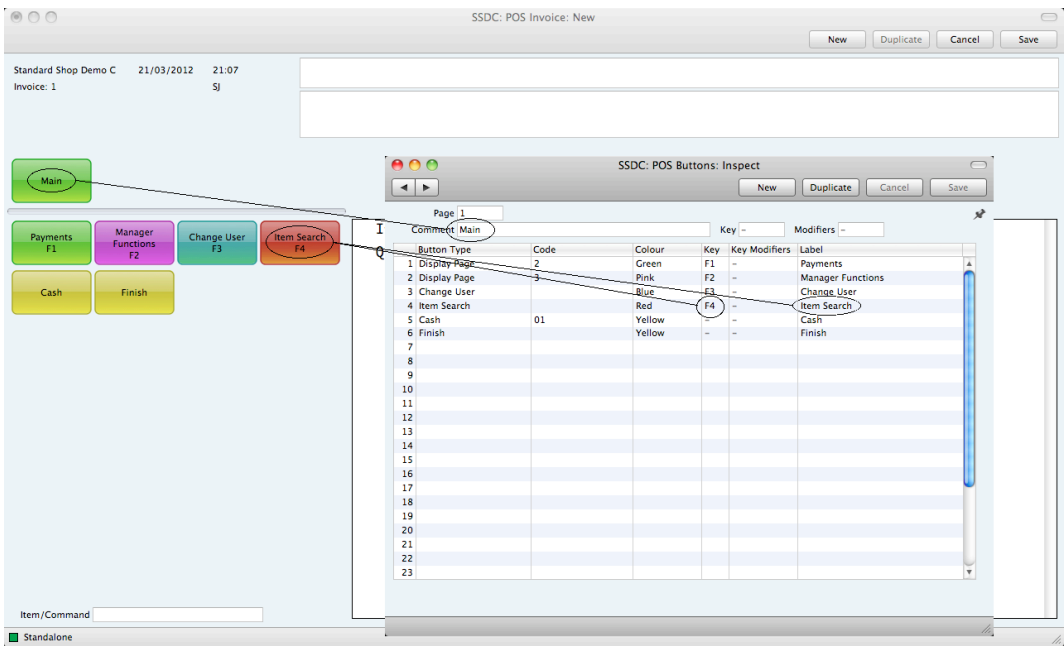
The new buttons will appear immediately. However, you will need to quit and restart in order to register the removal of the other dummy buttons.

Available Tools and Functions (POS Button Types)

When you use the POS Buttons setting to create a set of buttons for the POS Invoice window, you should use the Button Type field in the matrix to specify the tasks or functions that you want to be carried out when you press or touch the buttons. The available tasks and functions are now described in detail, divided into the following sections—

As far as the POS Invoice workflow is concerned, the absolute minimum that you need is a button to register payment and a "Finish" button, although these buttons don't need to be visible when you first open a new POS Invoice (i.e. they don't need to be listed in the "Page 1" POS Button record).

Item Functions

Item

Function   Adds a specific Item to a POS Invoice.

Requirements   In the row in the POS Button record that defines the "Item" button, you must enter an Item Number in the Code field, using 'Paste Special' if necessary. This is the Item that will be added to the POS Invoice when you click or touch the button.

Workflow   1. Click or touch the "Item" button.

                    2. The relevant Item will be added to the POS Invoice.

Note   The "Item" button can be useful for commonly used Items, especially those without barcodes (for example, a parking fee).

Item Search

Function Adds an Item to a POS Invoice after searching for it by name.

Workflow 1. Click or touch the "Item Search" button.

2. The 'Search for Item' window appears—
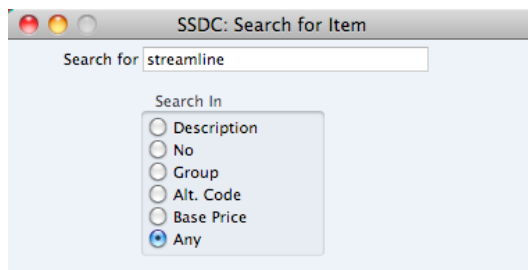
3. Enter part of the Item's name or other piece of information (information that fits one of the radio button options e.g. Item Group or Base Price) in the Search for field.

   Entering more than one word as the search string will be treated as a "Find All Words" search, not "Find Exact Phrase".

4. Press the Enter key.

5. The 'Paste Item' window will appear, listing the results of the search—
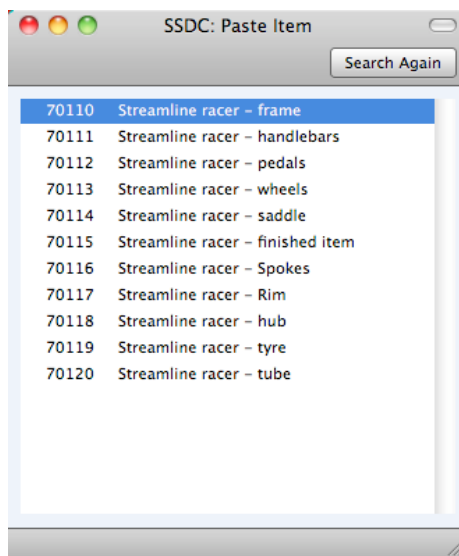
6. Double-click the one that you need, or highlight it and press the Enter key. The Item will be added to the POS Invoice. If the Item that you need isn't listed, click or touch the [Search Again] button or close the window using the close box or the Esc key.

Price Lookup

Function Displays the price of an Item without adding it to a POS Invoice.

Workflow 1. Click or touch the "Price Lookup" button.

2. The 'Price Lookup' window appears—

3. Scan the Item's barcode, enter its Item Number or Barcode, or choose an Item using 'Paste Special'. Then, press the [Proceed] button or the Enter key (not the Tab key).

4. The Item's price will be displayed in the Price field.

5. Click the [Cancel] button to return to the POS Invoice.

Modifying Invoice Lines

Amend Line

Function   Allows the modification of an existing line in a POS Invoice.

Workflow   1. Highlight the line in the POS Invoice that is to be changed. The last line added to the Invoice will be highlighted by default.

2. Click or touch the "Amend Line" button.

3. Enter the new quantity, price or discount in the 'Amend Line' window—

4. If the Till has a touch screen but no keyboard, touch the field to be amended and then touch the [Keypad] button to open a keypad. Enter the new figure and touch the [Enter] key.

5. Click or touch the [Proceed] button in the 'Amend Line' window to commit the amendment to the POS Invoice or [Cancel] to return to the POS Invoice without amending it.

Delete Row

Function   Removes a line from a POS Invoice.

Workflow   1. Highlight the line in the POS Invoice that is to be removed. The last line added to the Invoice will be highlighted by default.

2. Click or touch the "Delete Row" button.

3. The line will be removed.

Note   The "Delete Row" button will delete lines of all kinds from POS Invoices (e.g. it will remove payment lines, sales assistant lines etc as well as Item lines).

Void Item

Function   Removes a line from a POS Invoice.

Workflow
1. Highlight the line in the POS Invoice that is to be removed. The last line added to the Invoice will be highlighted by default.

2. Click or touch the "Void Item" button.

3. The line will be removed.

Note   The "Void Item" button will only delete lines containing Items from POS Invoices. Unlike the "Delete Row" button it will not delete other lines (e.g. lines containing payments).

Navigation and Appearance

Blank

Function   Adds a dummy button to the Button Page.

Notes   A dummy button can help with arranging buttons in the button area.

The buttons in a POS Button record will be shown in POS Invoices in the order in which you list them in the matrix. The first four buttons in the list in a POS Button record will appear in the first row of buttons in a POS Invoice, and so on. If you need the first row of buttons to contain three buttons, you can insert a "Blank" fourth button to ensure that the next button will be the first one on the second row.

If you do not want a dummy button to have a label (i.e. you want no text to appear on the button), enter a space in the Label field.

Display Page

Function   Changes the buttons shown in the button area in a POS Invoice.

Requirements In the row in the POS Button record that defines the "Display Page" button, you must enter the Page of the new POS Button record in the Code field.

Workflow
1. Click or touch the "Display Page" button.

2. The existing set of buttons will be replaced with a new set.

Notes   A parent button representing the new set of buttons will appear above the button area. The label in this button will be the Comment in the relevant POS Button record.

The original parent button will remain visible. You can click or touch this button to go back to the set of buttons that was originally visible. If you want to be able to go to any

other set of buttons, include "Display Page" buttons in each POS Button record.

Open Invoices

Function   Allows the modification of a previous unfinished POS Invoice

Workflow   1. Click or touch the "Open Invoices" button.

2. The 'Open POS Invoices: Browse' window opens—
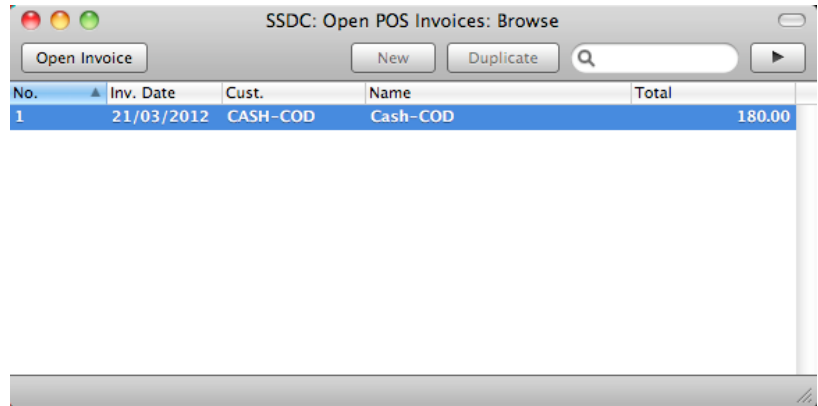
This is a list of unfinished POS Invoices.

3. Highlight the POS Invoice that you need to alter and click or touch the [Open Invoice] button in the top left-hand corner.

4. The POS Invoice is opened, replacing the one that was previously on screen.

Save Invoice

Function   Saves the current POS Invoice, closes it and opens an empty new one (i.e. it "parks" the current POS Invoice).

Notes   You can use the "Save Invoice" button when a Customer's Items have been scanned and the Customer then realises that they have forgotten something. You can "park" the POS Invoice and serve the next Customer while the first one is away.

To go back to the parked Invoice, click or touch the "Open Invoices" button.

Payment Methods

You must make sure you have placed at least one of the buttons listed in this section in the POS Invoice window (although not necessarily in the "Page 1" POS Button record). The POS Invoice workflow requires you to be able to record payments.

Cash

Function   Receives and manages cash payments for POS Invoices.

Requirements   In the row in the POS Button record that defines the "Cash" button, you must specify a Payment Mode in the Code field, using 'Paste Special' if necessary.

Workflow	1.	When every Item has been added to a POS Invoice, click or touch the "Cash" button.
	2.	The 'Cash Payment' window appears—

	3.	Enter the value of the cash payment provided by the Customer in the top Amount Tendered field. The Change Due field will show you how much change is needed.
	4.	Enter the value of the change that you give to the Customer in the Change Given field. (This is only necessary if the figure is not the same as the Change Due.)
	5.	If you are using a touch-screen, use the numeric keypad to enter amounts, and touch the [Enter] button to move from field to field.
	6.	Click or touch [Proceed] to commit the payment, or [Cancel] to abandon it.
	7.	Lines will be added to the bottom of the POS Invoice, showing the value of the cash payment and the change.

Cheque

Function	Receives and manages cheque payments for POS Invoices.
Requirements	In the row in the POS Button record that defines the "Cheque" button, you must specify a Payment Mode in the Code field, using 'Paste Special' if necessary.

Workflow	1.	When every Item has been added to a POS Invoice, click or touch the "Cheque" button.
	2.	The 'Cheque Payment' window appears—

3. Enter the value of the cheque payment in the Amount field (this will default to the total of the POS Invoice) and the cheque number in the Cheque No. field.

4. If you are using a touch-screen, use the [Keypad] button to open a numeric keypad to enter the Amount or Cheque No.

5. Click or touch [Proceed] to commit the payment, or [Cancel] to abandon it.

6. A line will be added to the bottom of the POS Invoice, showing the value of the cheque payment.

Credit Card

Function   Receives and manages credit card payments for POS Invoices.

Requirements   In the row in the POS Button record that defines the "Credit Card" button, you must specify a Payment Mode in the Code field, using 'Paste Special' if necessary.

Workflow   1. When every Item has been added to a POS Invoice, click or touch the "Credit Card" button.

2. The 'Credit Card Payment' window appears—

3. Enter the value of the credit card payment in the Amount field (this will default to the total of the POS Invoice).

4. If you are using a touch-screen, use the [Keypad] button to open a numeric keypad to enter the Amount.

5. Click or touch [Proceed] to commit the payment, or [Cancel] to abandon it.

6. A line will be added to the bottom of the POS Invoice, showing the value of the credit card payment.

Debit Card

Function   Receives and manages debit card payments for POS Invoices.

Requirements   In the row in the POS Button record that defines the "Debit Card" button, you must specify a Payment Mode in the Code field, using 'Paste Special' if necessary.

Workflow   1. When every Item has been added to a POS Invoice, click or touch the "Debit Card" button.

2. The 'Debit Card Payment' window appears—

3. Enter the value of the debit card payment in the Amount field (this will default to the total of the POS Invoice).

4. If you are using a touch-screen, use the [Keypad] button to open a numeric keypad to enter the Amount.

5. Click or touch [Proceed] to commit the payment, or [Cancel] to abandon it.

6. A line will be added to the bottom of the POS Invoice, showing the value of the debit card payment.

Pay

Function Receives and manages payments for POS Invoices, to be used when the Customer uses more than one payment method (e.g. cash and credit card). You can also receive such payments individually (e.g. using the "Cash" button followed by the "Credit Card" button).

Requirements Your payment methods must be listed in the Payment Modes setting. This setting is described on page 62.

Workflow 1. When every Item has been added to a POS Invoice, click or touch the "Pay" button.

2. The 'Payment' window appears—

There will be one Amount field for each Payment Mode (i.e. one Amount field for each payment method).

3. Enter the value of the payment in the Amount field(s) for the relevant payment method(s).

4. If you are using a touch-screen, use the [Keypad] button to open a numeric keypad to enter the Amount.

5. Click or touch [Proceed] to commit the payment, or [Cancel] to abandon it.

6. Lines will be added to the bottom of the POS Invoice (one line for each payment method), showing the value of the payment.

Notes   It is not practical to use the "Pay" button if you have many Payment Modes. If so, the depth of the 'Payment' window becomes limited by the size of the screen, so the Received Total and Change fields and some Amount fields will not be visible. In this situation it is recommended that you use individual Button Types instead (e.g. "Cash" and "Credit Card").

If the 'Payment' window does not list every payment method, this will be because the window has lost connection with the Payment Modes setting. Re-establish the connection by opening the Payment Modes setting, making a minor change and saving. Then close and re-open the 'Payment' window. It should now list every payment method. This problem is most likely to occur in a new database.

Personnel Functions

Change User

Function   Allows a new cashier to log in.

Workflow   1. Click or touch the "Change User" button.

2. You will be logged out and the 'Login' window will be opened, ready for the next cashier.

3. After the next cashier logs in, the POS Invoice that was previously on screen will re-appear, allowing the new cashier to continue with the transaction. The new cashier's Signature (log-in ID) will appear in the top left-hand corner of the POS Invoice.

Sales Assistant

Function   Adds a line to a POS Invoice acknowledging the help of a Sales Assistant. This can be useful when you want to acknowledge a Sales Assistant for helping a Customer to choose an Item.

Workflow   1. After adding or scanning the Item for which the Sales Assistant is to be credited, click or touch the "Sales Assistant" button.

2. The 'Sales Assistant' window will appear—
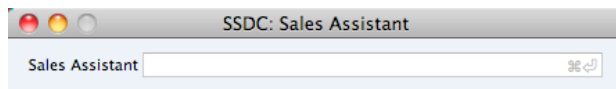
3. Enter the name of the Sales Assistant (using 'Paste Special' if necessary) or scan their ID card. It is not necessary for the Sales Assistant to have their own record in the Persons setting.

4. Use the Shift-Enter keyboard shortcut to add the Sales Assistant's name to the POS Invoice, or click [the close box or use the ESC key to leave the POS Invoice unchanged.

Select Salesman

Function   Changes the Salesman in a POS Invoice.

Workflow   1. Click or touch the "Select Salesman" button.

2. The 'Enter Salesman' window will appear—
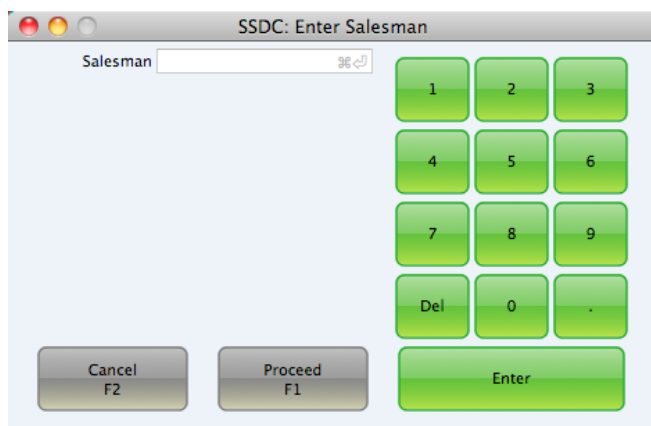
3. Enter the Signature of the Salesman, using 'Paste Special' if necessary, or scan their ID card. The Salesman must have their own record in the Persons setting.

4. Click or touch [Proceed] to add the Salesman to the POS Invoice, or click [Cancel] to leave the POS Invoice unchanged.

Notes   The default Salesman in a POS Invoice will be the current user.

The "Salesman" button changes the Salesman field in a POS Invoice, while the "Sales Assistant" button adds a row to a Invoice that credits the Sales Assistant.

Processing Invoices

Finish

Function   Prints, approves and closes the POS Invoice, and opens a new POS Invoice.

Requirements   The POS Invoice must be fully paid.

For details about printing POS Invoices, please refer to page 51 below.

Workflow
1. When a POS Invoice is complete (including payment), click or touch the "Finish" button.

2. The POS Invoice will be printed, saved and closed, and a new one opened, ready for the next Customer.

3. If you needed to give change to the previous Customer, the amount will be shown in the new POS Invoice as a reminder until you start adding Items.

Note
You must make sure you have placed a "Finish" button somewhere in the POS Invoice window (although not necessarily in the "Page 1" POS Button record). The POS Invoice workflow requires you to use this button to close the previous POS Invoice and open the next one.

Invalidate Invoice

Function
Invalidates or voids a POS Invoice

Workflow
1. Click or touch the "Invalidate" button.

2. The POS Invoice will be saved in an invalidated state and closed, and a new empty POS Invoice opened, allowing the cashier to enter the next Invoice.

Notes
You can use the "Invalidate Invoice" button when a Customer's Items have been scanned and the Customer then realises they cannot pay.

An invalidated POS Invoice is easily distinguished because all fields have red lines drawn through them.

Returns

Return

Function
Allows Customers to return Items.

Workflow
Either—

1. Locate and open the POS Invoice for the original sale.

2. Click or touch the "Return" button. A new POS Invoice will be created, identical to the original with the exception that all quantities will be changed from positive to negative.

Or—

3. Create a new POS Invoice.

4. Add the Items being returned.

5. Save the POS Invoice.

6. Click or touch the "Return" button. All quantities will be changed from positive to negative.

For both methods, continue as follows—

7. If you will be giving a refund, click or touch the button representing the relevant payment method and enter a negative payment.

8. Click or touch "Finish" to close the POS Invoice as normal.

Note   If the Customer possesses the original receipt as proof of purchase, use the "Return Invoice No." button to record the Invoice Number of this receipt in the refund Invoice.

Return Invoice No.

Function   Allows you to record the original Invoice Number when a Customer returns an Item.

Workflow   1. Click or touch the "Return Invoice No." button.

2. The 'Return Invoice No.' window opens—

3. Enter the original Invoice Number from the receipt presented by the Customer using the keypad.

4. Click or touch [Proceed] to add the original Invoice Number to the current POS Invoice or [Cancel] to leave the current POS Invoice unchanged.

Entering a POS Invoice

To open the POS Invoice register, click the [POS Invoices] button in the Master Control panel or use the ⌘-1 keyboard shortcut. The 'POS Invoices: Browse' window is opened, showing POS Invoices already entered.

As in all browse windows you can change the sort order by clicking on the column headings. To reverse any sort, simply click once again on the column heading. You can scroll the list using the scroll bars or the trackpad. Finally, you can search for a record by entering a keyword in the field at the top right-hand corner. Standard POS will search for the first record matching the keyword in the same column as the selected sorting order. You can also change the order of the columns by dragging the column headings, and remove columns altogether using the check boxes in the drawer.

To enter a new POS Invoice, click the [New] button in the Button Bar or use the ⌘-N keyboard shortcut. Alternatively, select an Invoice similar to the one you want to enter and click [Duplicate] on the Button Bar (or ⌘-Y).

The touch screen interface appears, as shown below—

The buttons on the left of the window are fully customisable: the buttons on your screen are likely to be different to those shown in the illustration. Some of these buttons are described below but for full details about using and configuring them please refer to page 37 above.

The 'POS Invoice: New' window has been designed to make operation by touch and in real time quick and easy. The features of this window are now described.

Adding Items to a POS Invoice

When you open a new POS Invoice, the insertion point will be in the Item/Command field in the bottom left-hand corner. To add an Item to the Invoice, simply type its Item Number and press the Enter or Return key, or scan the Item's barcode. The Item will be added to the POS Invoice with quantity 1—

Enter as many Items as necessary, by entering the Item Numbers or scanning the Items' barcodes.

The Item/Command field is the only field in the POS Invoice where you can enter information. If you need to change something, you can only do so using buttons, as follows—

- To change the price or quantity of an Item or to add a discount, highlight the Item in the POS Invoice and then click or touch the "Amend Item" button. The "Amend Item" button is described in more detail above on page 39.

- To remove an Item, highlight it in the POS Invoice and then click or touch either the "Delete Row" or "Void Item" buttons. To remove a non-Item row (e.g. a payment row), you must use "Delete Row". These buttons are described in more detail above on pages 39 and 40 respectively.

Payment

When you have added the Items to the POS Invoice, you should receive payment from the Customer. To do this, you can either click or touch the relevant button for the payment method used by the Customer (e.g. the "Cash" or "Credit Card" buttons), or you click or touch the "Pay" button (if the Customer pays using more than one payment method and if the POS Invoice contains a "Pay" button).

Please refer to the following pages for details about each payment method—

If the Customer cannot pay, you can cancel or void the POS Invoice. This is known as "Invalidating" the POS Invoice. The POS Invoice will remain in your system, but it will be marked with red lines. If you print a receipt, it will be marked "Cancelled". Invalidating a POS Invoice is described on page 47.

Closing (Finishing) a POS Invoice

After receiving payment, you should print the receipt, close the POS Invoice and open a new one ready for the next Customer. To do this, simply click or touch the "Finish" button and all these tasks will be carried out. If you needed to give change to the previous Customer, the amount will be shown in the new POS Invoice as a reminder until you start adding Items.

Returns

It will sometimes be necessary to reverse a previous POS Invoice, because the Customer returns the Items or because the Invoice contained an error. Two methods are available—

1. If a POS Invoice is on screen, close it using the close box or the Esc key. Open the 'POS Invoices: Browse' window using the ⌘-1 keyboard shortcut. Find the POS Invoice to be credited and open it. Click or touch the "Return" button. A new POS Invoice will be created and opened, with negative quantities.

2. Create a new POS Invoice and enter the Items being returned. Save it, but do not approve it. Then, click or touch the "Return" button. The quantities are changed to negative figures.

In both cases, use the "Return Invoice No." button if you want to add a reference to the Invoice Number of the original POS Invoice.

In both cases, you can now process the Return as if it were a normal POS Invoice.

Changing Cashiers

If the POS Invoice contains a "Change User" button, click or touch this button to change cashiers. The current POS Invoice will remain open on screen. The "Change User" button is described above on page 45.

Printing POS Invoices

When you touch or click the "Finish" button in a POS Invoice, a till receipt will be printed from the POS Invoice, the POS Invoice will be approved and closed, and a new POS Invoice opened on screen. For till receipts to be printed from POS Invoices, a USB printer must be connected to the computer. Follow these steps—

1. Connect a USB printer to the computer and install any necessary drivers.

2. Using the tools provided by the computer's operating system, specify that the USB printer is the default printer.

The Form (i.e. the stationery) used when printing POS Invoices will be determined as follows—

1. Using the Form register, design the POS Invoice Form. Use the 'Properties' function on the Operations menu to name the Form (in this description, we have used the name "POS_INVOICE"). Several sample POS Invoice Forms are supplied with Standard POS: you can modify these to suit your requirements. Full instructions for using the Form register can be found below on page 69.

2. Click the [Documents] button in the Master Control panel or use the ⌘-D keyboard shortcut. The 'Documents' list window is opened: highlight 'POS Invoices'.
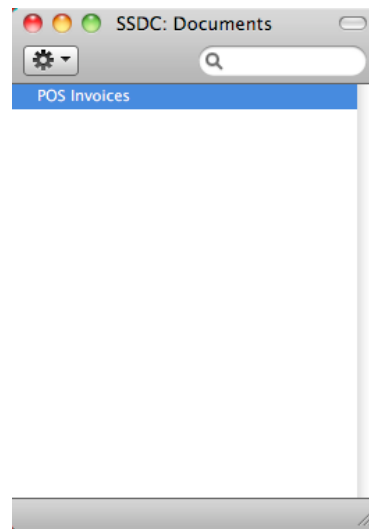
3. Select 'Define Document' from the Operations drop-down menu.
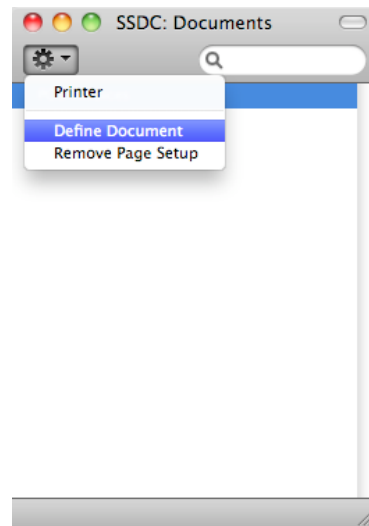
4. In the subsequent window, enter "POS_INVOICE" in the Form field of the first row (you can use 'Paste Special' to ensure the spelling is correct).

If you only want to be able to print POS Invoices that have been Finished, enter "OKed" in the Status field. This will prevent the printing of Invoices that have not yet been Finished.

5. Click [Save] to save the POS Invoice Form definition. From now on, the POS Invoice Form that you have designed will be used whenever you print a POS Invoice.

Persons

The Persons setting holds information about Persons, i.e. users, employees, sales persons etc. You can use it as part of your Standard POS security system: each Person can be given their own password. Once you have entered at least one record to the setting, the password dialogue box will appear each time you start Standard POS, requiring you to enter your Signature (i.e. log-in ID) and password.

Entering a Person Record

To open the Persons setting, click the [Settings] button in the Master Control panel. When the 'Settings' list opens, double-click 'Persons'. The 'Persons: Browse' window is opened, showing Persons that have already been entered.
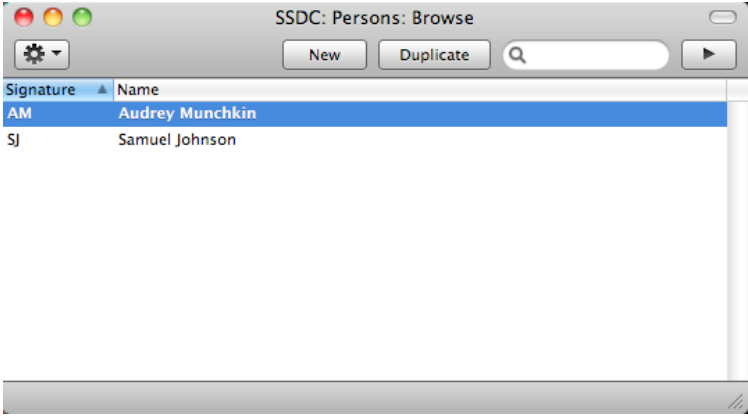
To create a new Person record, click the [New] button in the Button Bar or use the ⌘-N keyboard shortcut. Alternatively, highlight a Person similar to the one you want to enter and click [Duplicate] on the Button Bar.

The 'Person: New' window will be opened, empty if you clicked [New] or containing a duplicate of the highlighted Person.
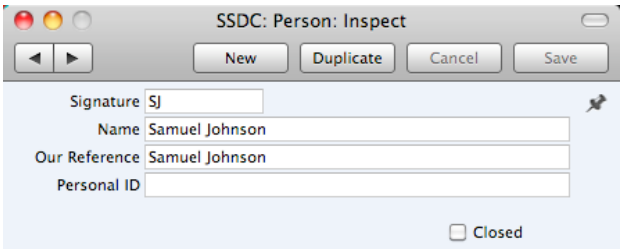
Signature   The Signature is the Person's log-in ID.

Name   The name of the Person.

Our Reference   Use the Our Ref field to assign a short (up to 20 characters) reference text for the employee. This text will be copied to the hidden Our Ref field in all POS Invoices entered by the Person.

Personal ID   In countries where personal identity cards are carried, enter the Person's ID number from their card here.

Closed   Check this box if the Person is no longer to be used. A closed Person cannot log in to your Standard POS database, but can be re-opened at any time.

When the Person record is complete, save it using the [Save] button and close the window by clicking the close box. Remember to give the Person a password and, if the Person will need to use it, to activate the Personal Desktop for them, using the functions on the Operations menu described immediately below.

Operations Menu
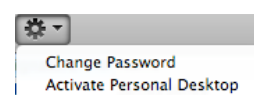
The Operations menu for Persons is shown above. It is available for the 'Persons: Browse' window: highlight a Person in the list before selecting the function.

Change Password

Once you have recorded a user or employee in the Persons setting, they will be able to log in to and use your Standard POS database. For security reasons, therefore, it is recommended that all Persons have their own passwords and that these are changed from time to time.

You can assign Passwords to Persons as you add them to the Persons setting. If you do not do this, each Person will be asked to set a password the first time they log in. To set a password for a Person as you add them to the Persons setting (or to change a password at any other time, for example if a Person leaves the company), highlight their name in the 'Persons: Browse' window and select 'Change Password' from the Operations menu. The following window will be opened—

Type in the new password twice to ensure that it is correct. Click [Save] to close the window and save, or click [Cancel] if you do not want to save changes. The password is case-sensitive.

Activate Personal Desktop

To activate the Personal Desktop for a Person, first click on the Person in the 'Persons: Browse' window and then select 'Activate Personal Desktop' from the Operations menu.

Please refer to page 23 for more details about the Personal Desktop.

Settings

Introduction

Settings allow you to tailor the operation of Standard POS to your requirements, and to supply information to be used throughout the program. Many settings take the form of preferences: examples include Invoice Settings, which you can use to inform Standard POS which VAT Code is to be used as a default. Other settings such as the VAT Codes setting itself require a number of records to be entered: this information tends to be used in 'look-up' tables (i.e. 'Paste Special' windows) from the main registers.

To edit or add to a setting, click the [Settings] button in the Master Control panel. You can also use the ⌘-S keyboard shortcut. The 'Settings' list window will open, listing all the Settings in Standard POS.
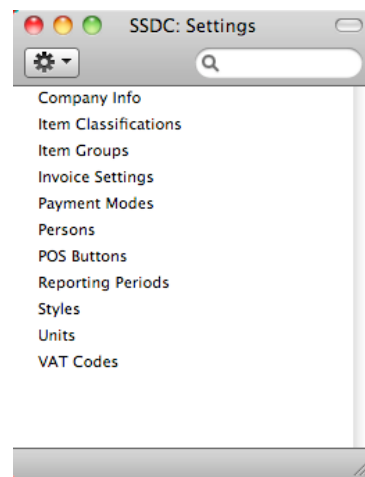
Choose an entry in the list by double-clicking it, or by selecting it and pressing the Enter key. Each setting is described in detail below.

Types of Setting

The settings in Standard POS can be divided into three groups—

1. Settings of the first type take the form of a single screen where you can set preferences to determine exactly how Standard POS is to operate in a certain situation. Examples of such settings include Invoice Settings and Company Info.
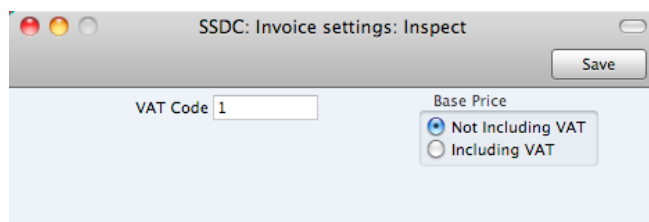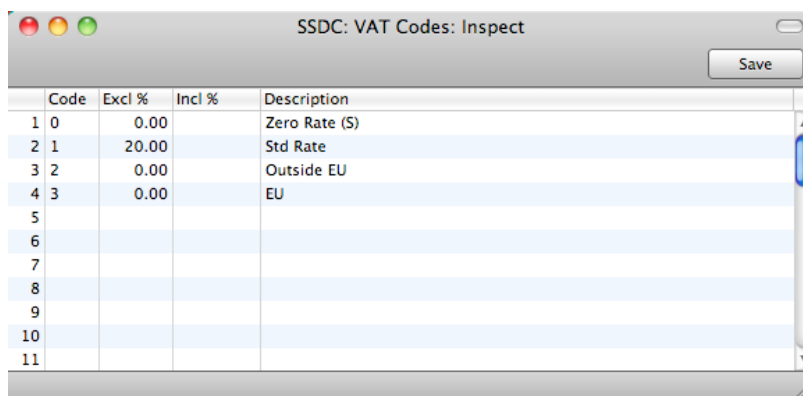
When you open one of these settings from the 'Settings' list, you can change any of the fields as required. To save changes and close the

window, click the [Save] button. To close the window without saving changes, click the close box.

2. Settings of the second type contain a number of records that are displayed in a grid. Each row in the grid represents a separate record. Examples of this type of setting include Payment Modes and VAT Codes.

When you open one of these settings from the 'Settings' list, you can change any of the fields in the existing records as required. To add new records to the list, click in any field in the first blank row and enter appropriate text. To remove a record, click on the row number on the left of the row containing the record and press the Backspace key. To insert a row, click on the row number where the insertion is to be made and press Return. To save changes to all records in the grid and close the window, click the [Save] button. To close the window without saving changes, click the close box.

When working in one of the main registers, you may need to refer to a particular record in a setting of this type: the 'Paste Special' look-up function is provided to make this task as easy as possible. For example, when entering an Item, you can use 'Paste Special' to choose the relevant VAT Code. To help you choose the correct record using 'Paste Special', it is recommended that you keep the rows in the alphabetical or numerical order of the Codes.

3. Settings of the final type also contain a number of records, but behave in a similar manner to the main registers. Therefore, their contents are displayed in browse windows, from where you can double-click records for editing. Use the [New] or [Duplicate] buttons to create new records. Again, when working in one of the main registers, you may need to refer to a particular record in a setting of this type using the 'Paste Special' look-up function. Examples of this type of setting are Item Groups and Styles.

When you open one of these settings from the 'Settings' list, the browse window is displayed, listing the records already entered.
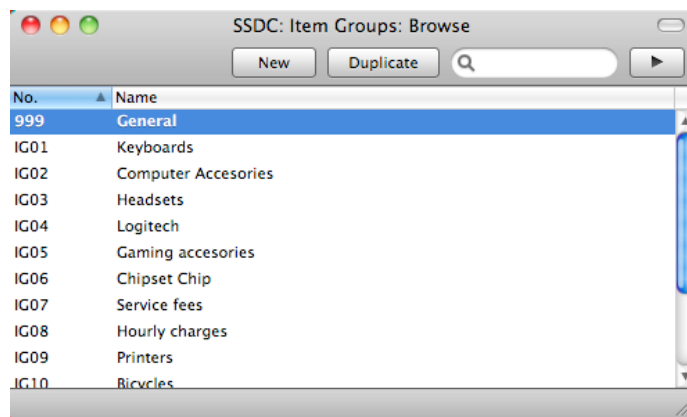
You can sort and search in these browse windows in the normal way. Double-click an item in the list to edit it, or add a new record by clicking the [New] button in the Button Bar. Alternatively, highlight a record similar to the one you want to enter and click [Duplicate] on the Button Bar. A record window is then opened, allowing you to change the existing record or enter the new one.
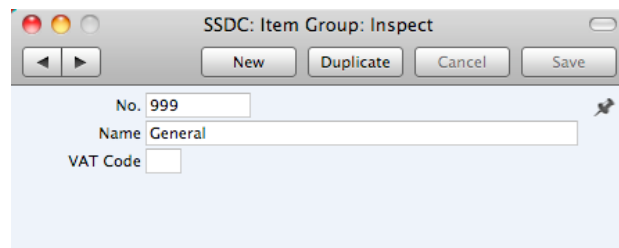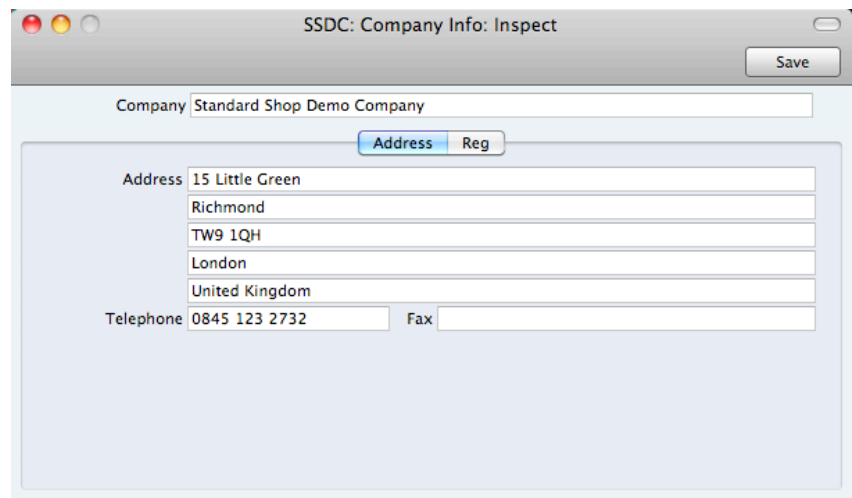
To save changes, click the [Save] button. To close the window without saving changes, click the close box. You can also close the browse window using the close box.

Company Info

Use this setting to record your company's name and address, and other particulars such as phone and fax numbers, and the bank and bank account number. This information will be printed as appropriate on all documents.

To open the Company Info setting, first click the [Settings] button in the Master Control panel. Double-click 'Company Info'. The 'Company Info: Inspect' window is opened.
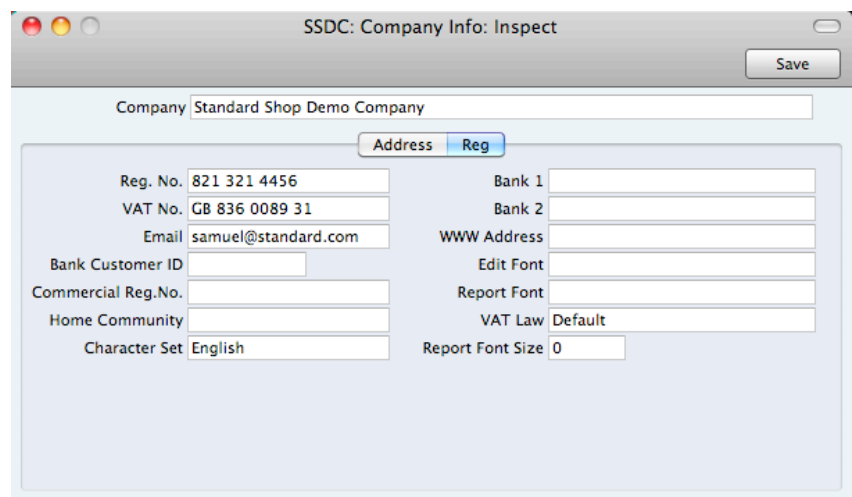
When you start using Standard POS and create a new database, you will be asked to provide your Company name and address in the 'Create a New Company' window. This information will be copied to the Company Info setting as shown above.

Apart from the Company Name, Address etc, you should enter the following information in this setting, on the 'Reg. No.' card—

Reg. No.   Enter your company registration number here. This information can then be printed on any appropriate documentation.

VAT No.   Enter your VAT Registration Number here. This information can then be printed on any appropriate documentation.

Bank 1, Bank 2 You should enter your company's main bank account number(s) here. This information can then be printed on any appropriate documentation.

Bank Customer ID This is an ID number used for electronic communication with certain banks and other credit institutions in some countries. Please contact your local Standard POS representative for details.

Edit Font, Report Font, Report Font Size

Paste Special   Fonts in your system

These fields allow you to select different fonts for use on screen and in reports respectively. If you leave these fields empty, the default fonts in Standard POS will be used. These fonts are selected for maximum readability, and you should only change them if you have good reasons to do so. In non-English versions of Standard POS, use these fields to select fonts with special character sets.

Commercial Reg. No.

This field is used in Portugal. Enter the commercial registration number of your company. This information is required for SAF-T reporting.

Home Community This field is used in Portugal. Enter the region or district in which your company is located. This information is required for SAF-T reporting.

VAT Law   **Paste Special**   Choices of possible entries

Use this field to ensure the behaviour of Standard POS conforms to the local accounting conventions in your country. If your country is not listed in the 'Paste Special' list, choose the "Default" option.

Character Set   **Paste Special**   Choices of possible entries

This field is used to control sorting in Standard POS. In countries where the alphabet differs to that of the UK/US, sorting by ASCII codes produces a list that is not in the correct alphabetical order: use this field to overcome this problem.

Confirm the entry by clicking [Save], or cancel it by closing the window using the close box.

Invoice Settings

You should use the Invoice Settings setting to choose the VAT Code that will be used as a default in your POS Invoices. This default will be used in the absence of VAT Codes being specified in the Items used in the POS Invoices (or in the Item Groups to which the Items belong). You should also use this setting to specify whether your sales prices include VAT.

To open this setting, first click the [Settings] button in the Master Control panel. Then double-click 'Invoice Settings' 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.

VAT Code	**Paste Special**	VAT Codes setting

The VAT Code will determine the rate at which VAT will be charged whenever you sell an Item. For each Item that you sell, the default VAT Code will be chosen in this order—

1. It will be taken from the Item record itself.

2. It will be taken from the Item Group to which the Item belongs.

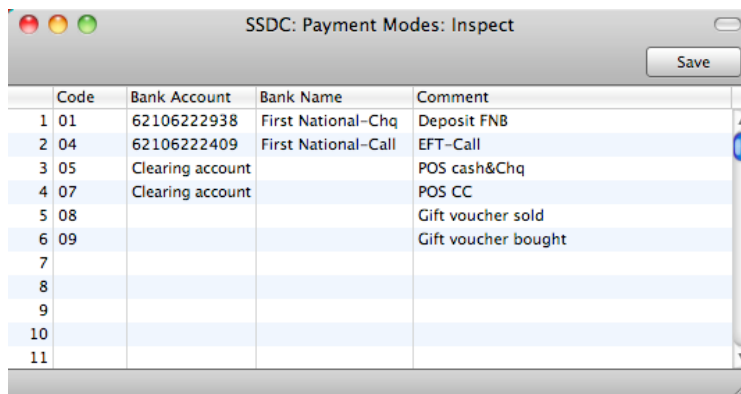3. This VAT Code in the Invoice Settings setting will be used.

Base Price   Use these options to specify whether the sales Prices in the Item records are to include VAT. VAT rates are defined in the VAT Codes setting.

Item Classifications

This setting allows you to define any number of Classifications that you can then use to categorise your Items. The Item record contains a Classification field in which you can enter one or more Classification Codes, separated by commas. So, for example, you can enter two Classifications for an Item such as a radio/cassette player, to classify it both as a radio and as a playback device.

The Item Classification provides an alternative means of classifying Items to the Item Group (described below on page 62). You will usually use Item Groups to group Items together for accounting purposes (e.g. Items with the same VAT Code can belong to the same Item Group). On the other hand, you can use Classifications to group Items together for sales purposes. Each Item can belong to several Item Classifications, but can only belong to a single Item Group.

To work with Item Classifications, first click the [Settings] button in the Master Control panel to open the 'Settings' list. Double-click 'Item Classifications' in the 'Settings' list. To create a new record, click the [New] button in the Button Bar, or highlight a record in the list that is similar to the one that you are about to create and click [Duplicate]. When the record is complete, click the [Save] button in the Button Bar to save changes and close it using the close box, or click the close box if you don't want to save changes.
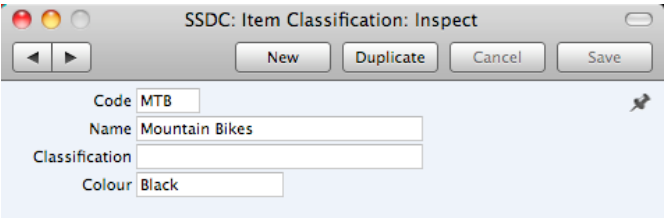
Code   Enter a unique code to identify the Item Classification. You can use any combination of letters and numbers. There is a maximum of five characters.

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.

Item Groups

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

To work with Item Groups, click the [Settings] button in the Master Control panel. Double-click 'Item Groups' in the 'Settings' list. To create a new record, click the [New] button in the Button Bar, or highlight a record in the list that is similar to the one that you are about to create and click [Duplicate]. When the record is complete, click the [Save] button in the Button Bar to save changes and close it using the close box, or click the close box if you don't want to save changes.

No.	Enter the code or number identifying the 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.
	The Name will be shown in the 'Paste Special' list that you will use when assigning Item Groups to Items and elsewhere, so it should be descriptive enough to make the selection of the correct Item Group easy for all users.

VAT Code	**Paste Special**	VAT Codes setting, Nominal Ledger

The VAT Code will determine the rate at which VAT will be charged whenever you sell an Item. For each Item that you sell, the default VAT Code will be chosen in this order—

1. It will be taken from the Item record itself.

2. It will be taken from this field in the Item Group to which the Item belongs.

3. The VAT Code in the Account Usage S/L setting will be used.

Payment Modes

Payment Modes represent the different methods by which your POS Invoices will be paid by your Customers. Typical examples are cash, cheque, direct debit and credit card.

To open the Payment Modes setting, click the [Settings] button 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 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 appropriate text. To remove a Payment Mode, click on the row number on the left of the row and press the Backspace key.

| Code | | Enter a unique code by which the Payment Mode is to be identified from elsewhere in Standard POS. |

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

Bank Account   If the Payment Mode represents payments into a particular bank account, enter here the relevant bank account number.

Bank Name   Record the name of the bank where the account is held here.

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

Please refer to page 54 above for details about this setting.

POS Buttons
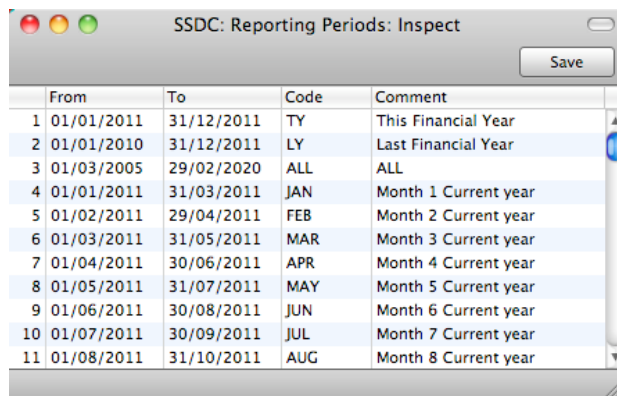
Please refer to page 31 above for details about this setting.

Reporting Periods

This setting allows you to name and define certain time periods. These should be the periods that you will commonly use when you produce reports. If you open the 'Paste Special' list from the Period field of a report specification window, that list will consist of the Reporting Periods entered in this setting. For example, if you often produce monthly reports you should define each month as a separate period in this setting.

To open the Reporting Periods setting, first click the [Settings] button in the Master Control panel. The 'Settings' list opens: double-click 'Reporting Periods'. When the 'Reporting Periods: Inspect' window opens, you can enter a new

Reporting Period simply by clicking in the first blank line and entering details as appropriate. Click [Save] to save and close, or the close box to close without saving changes.

It is a good idea to assign a Code that is easy to remember to each Reporting Period. You can use Codes as a quick way to choose a Reporting Period. For example, using the Reporting Periods illustrated above, type "MAR" in the Period field of a report specification window when you want the report to cover March in the current year. When the current year comes to an end, you should update your Reporting Periods so that they remain current. For example, you should change the From and To dates for the Code MAR to ensure that typing "MAR" in a report specification window will now produce a report for March in the new year.

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 Period is always offered as a default. You can simply change the dates and, if necessary, the Code in the first row, but if you want 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
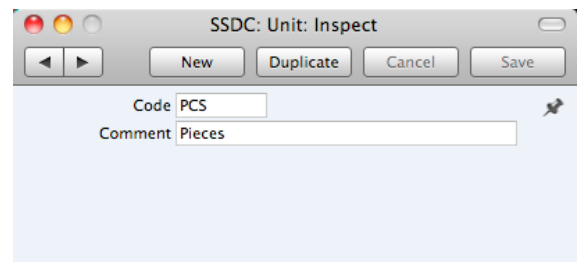
Please refer to page 77 below for details about this setting.

Units

The "Unit" of an Item is the quantity to which its price refers. You might, for example, sell some Items singly, some in pairs and others in dozens. The single Item, the pair and the dozen are all separate Units. You can list the Units that are used in your business in the Units setting, thus making them available in a 'Paste Special' list. Having done so, you can assign Units to your Items using the Unit field in each Item record. For example, if an Item is sold in boxes of twelve, its Unit should be "Dozen". When the Item is included in an Invoice, the Quantity will refer to this Unit. If the Quantity in an Invoice is 2, this means "two boxes of twelve". The Price of the Item will also refer to this Unit. 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 POS. You can enter up to five characters, and you can use both numbers and letters.
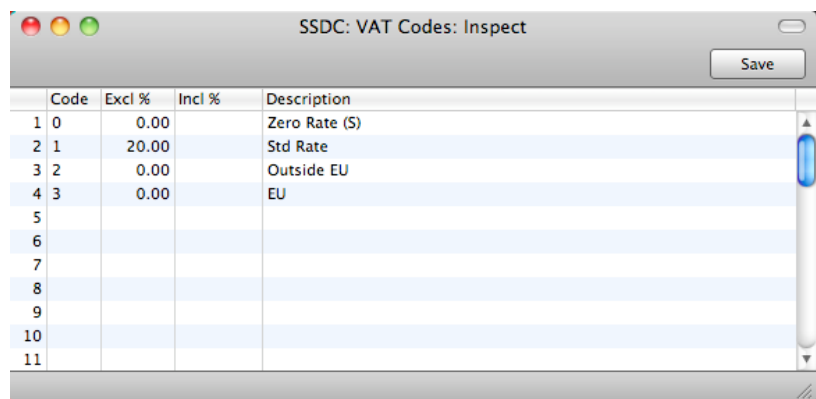
Comment   Here you enter the name for the Unit record as it will be shown in the 'Units: Browse' window and the 'Paste Special' list.

VAT Codes

In order to comply with VAT regulations in various countries, you may need to charge VAT at different rates, depending on the Item in question. To address this issue, you should use the VAT Codes setting to define as many VAT Codes as you need, with different accounting specifications.

After defining your VAT Codes, you can then assign them to your Items. VAT Codes ensure Standard POS will calculate VAT using the correct percentages.

To work with VAT Codes, first click the [Settings] button in the Master Control panel to open the 'Settings' list. Double-click 'VAT Codes' in this list to open the following window—

To edit a VAT Code record, simply click in the field to be changed and overtype 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   You should assign a unique Code to each VAT Code record, with a maximum of two characters.

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 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.

Documents

Introduction

When you need to print an individual record, you will do so by printing a document. Documents are formal printouts such as invoices, often printed for sending to third parties (e.g. Customers). You can use up to three methods to print documents. These are—

1. When you click or touch the "Finish" button in a POS Invoice, the Invoice will be printed automatically.

2. Open the POS Invoices register, highlight the record that you want to print in the list and select 'Print' from the File menu. You can select a number of records by shift-clicking to print them all.

3. Use the [Documents] button in the Master Control panel or the ⌘-D keyboard shortcut to open the list of documents.
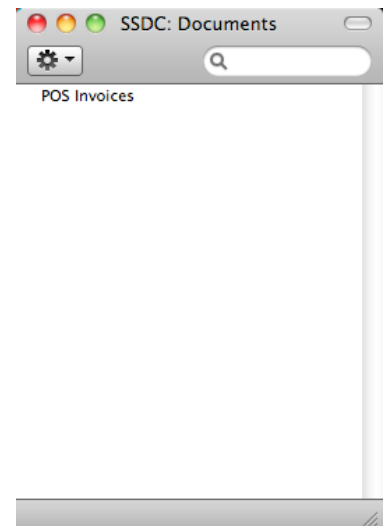
If you are using the third method, continue with these steps—

4. If you need to set the page size, number of copies and other printer options for a document, click on it in the list once and choose 'Page Setup' from the File menu. You can also use this function to choose the printer on which the document is to be printed. These settings will be used whenever you print the particular document until you choose 'Page Setup' once again, or until you choose 'Remove Page Setup' from the Operations menu of the 'Documents' list.

5. Double-click the document that you want to print. A dialogue box (also known as a "specification window") will open, where you should specify the records that you want to print—
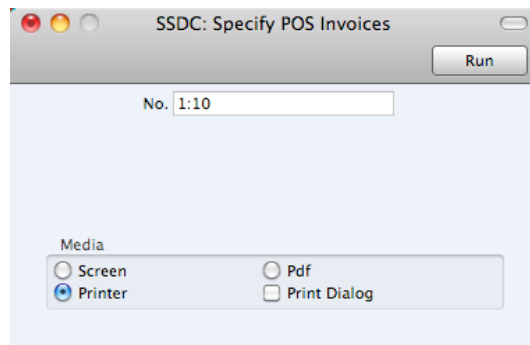
6. Specify the record or records that you want to be printed. If you want to print a range, separate the first and last records in the range using a colon as shown in the illustration where, to print Invoices 1 to 10, "1: 10" has been entered in the No. field. Depending on the field, the sort used might be alpha or numeric. In the case of an alpha sort, a range of 1:2 would also include 100, 10109, etc.

7. Use the Media options to choose the destination of the printout. If you need to use the Pdf option, you may need to use Styles that will embed fonts in the resulting pdf files. You may also need to choose a code page and page setup, which you can do in the Form Properties (the 'Page Setup' function mentioned earlier in this section does not apply when you choose the Pdf Media option). Please refer to page 77 below for details about Styles and page 73 for details about Form Properties.

8. Once you have specified the documents that you want to be printed and have chosen a print destination, click [Run] to print the documents.

Each document will be printed using a different Form (i.e. stationery). For details about designing Forms, please refer to the 'Designing Forms' section immediately below. For details about specifying the Form that will be used when you print a document, please refer to the 'Document Definition' section below on page 80.

Designing Forms

The Form register is a forms editor built in to Standard POS that you can use to design your own formats (i.e. your own stationery) to be used when printing documents. In this register, you can design separate Forms for each document used in the program.

To open the forms editor, click the [Forms] button in the Master Control panel or use the ⌘-3 keyboard shortcut. The 'Forms: Browse' window opens, showing the Forms that are already in the system—
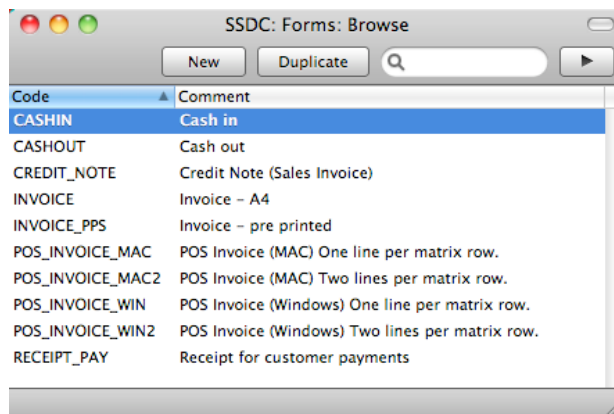
Double-click on a Form in the list to open and edit it, or click [New] or [Duplicate] in the Button Bar to create a new Form. When you have designed the Form, click [Save] in the Button Bar to save it in the normal way.
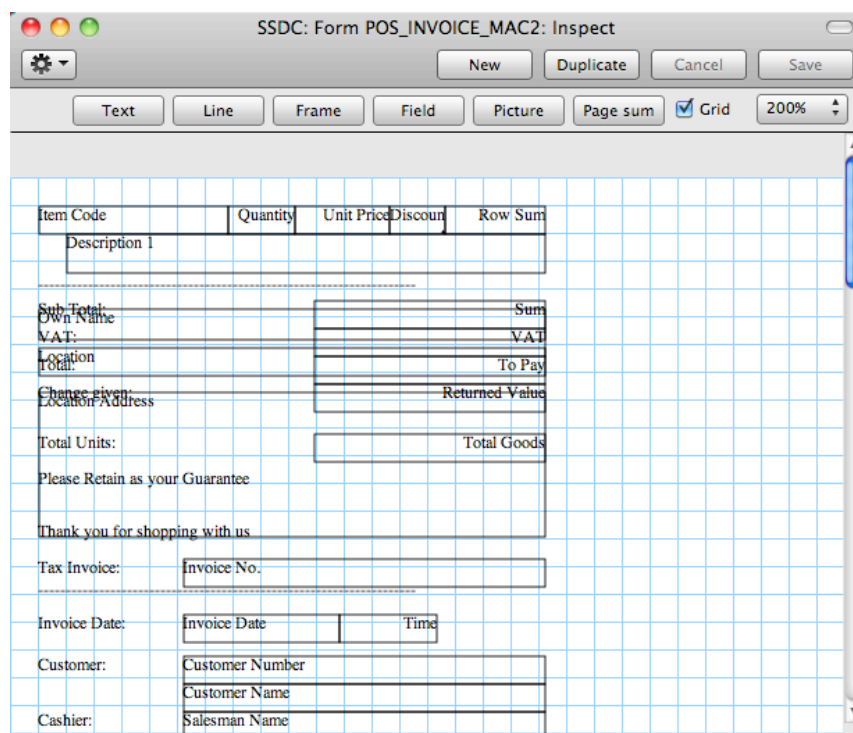
The 'Form: Inspect' window is where you can create the new Form or edit an existing one. At the top of the window there are five buttons: [Text], [Line], [Frame], [Field] and [Picture]. In the editing area, each object in the Form is shown either as a framed box, or as text. As in most drawing programs, you can move an object by clicking and dragging, and you can re-size it by dragging its corners.

Adding and Editing Objects

To add an object to the Form, click the appropriate button at the top of the window and then draw a box with the mouse in the Form where you want the object to appear. When you release the mouse button, a dialogue box will be opened, where you can place the object more precisely using coordinates, specify a font style and so on. To edit an object, double-click on it with the mouse. The same dialogue box will open, where you can edit the specifications of the object. Each object type has its own dialogue box, described below.

Text Objects

To add a new text object to the Form, click the [Text] button and then draw the object where you want the text to appear.

When you release the mouse button, the following dialogue box will appear—
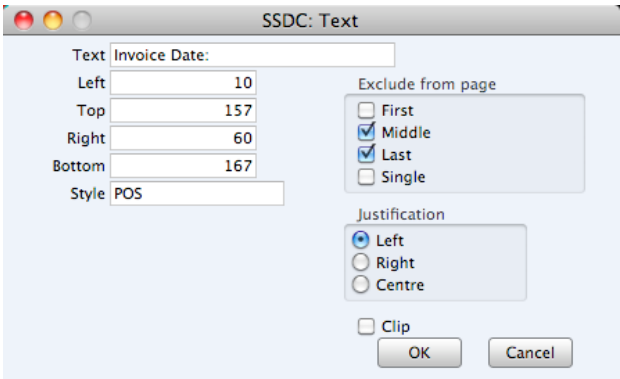
| Text | The text that is to be printed on the Form. This can be up to 80 characters long, but it is limited to one line. To create a text area with more than one line, use the appropriate number of separate one-line text objects. |

Left, Top, Right, Bottom

Use these fields to specify the size and position of the text box that is to contain the text. When you create a new text box, the measurements of the box that you have just drawn will appear here.

Style   **Paste Special**   Styles setting

Use this field to assign a font and font style to the text. You should define your Styles using a separate register that is fully described below on page 77. If you do not enter a Style here, the first record in the Style setting will be used.

Exclude from page Please refer to the 'Single- and Multi-Page Forms' section below on page 76 for details about these options.

Justification   Use these options to specify where the text will appear inside the text box.

Click [OK] to close. The text field is visible on the screen, and you can move it across the Form with the mouse.

To edit a text object once it has been created, double-click it to open the 'Text' dialogue box.

Lines and Frames

Use these tool buttons to draw lines and frames on the Form. Click either button and then draw the object. When you release the mouse button, a dialogue box will appear where you can indicate the width in pixels of the line or frame, and the pages on which it is to be printed.

Fields

A field is an area on the Form where a piece of information from your Standard POS database is to be printed. The following example from a POS Invoice Form explains how—

Fields are shown as boxes containing the field name. The boxes are for identification only: they will not be printed. You can use the [Frame] button to add a printing frame if necessary. Above each field is a text object (created using the [Text] button as described above) that identifies the information shown in the field. These would not be necessary if the Form is to be printed on pre-printed stationery. Text objects can be distinguished from fields as they are unboxed.

To add a field, click the [Field] button, and mark the position of the field. A dialogue box opens—

Fieldname	Paste Special	Fields for the Document Type

Enter the Field Name using 'Paste Special'. If you have assigned a Document Type to the Form as described below on page 74, 'Paste Special' will only list the fields for that Document Type. Otherwise it will list all fields. Fields belonging to other Document Types will not be printed.

Field Argument You can use the Field Argument with certain fields to control how they will be printed. For example, in some fields you can use the Field Argument to specify the number of decimal places that will be printed. The Field Argument can only be used with a few fields: please refer to the descriptions of the individual documents for details.

Left, Top, Right, Bottom

Use these fields to specify the size and position of the text box that is to contain the text. When you create a new text

box, the measurements of the box that you have just drawn will appear here.

Style	**Paste Special**	Styles setting

Use this field to assign a font and font style to the text. You should define your Styles using a separate register that is fully described below on page 77. If you do not enter a Style here, the first record in the Styles setting will be used.

Spacing   Some fields will cause more than one line of text to be printed (e.g. the fields listing the Items in Invoices). In these fields, you should use the Spacing field to specify the spacing between lines (in pixels). Usually the number of pixels that you specify here should be the same as the font size. If you leave this field empty, the lines of text will be printed on top of each other.

Format   In the case of matrix fields (for example, those printing the Items in Invoices), you should enter "1" as the Format (as well as specifying a Spacing). If the Format is 0, the printed matrix columns may not be aligned correctly if the first row only contains text.

Exclude from page Please refer to the 'Single- and Multi-Page Forms' section below on page 76 for details about these options.

Justification   Use these options to specify where the text will appear inside the text box.

Click [OK] to save.

Usually each field that you place in a Form corresponds to a field in the original record. For example, the Invoice Date field in the illustration above will print the contents of the Inv. Date field in each POS Invoice. An exception is the "Note" field. If you include the "Note" field in your Form design, this will print the first note or comment that you attach to the original record using the Attachments feature.

Pictures

Use the [Picture] button to include a picture in your design. As with other tools, click the button and draw a frame for the picture on the Form. A dialogue box then appears.
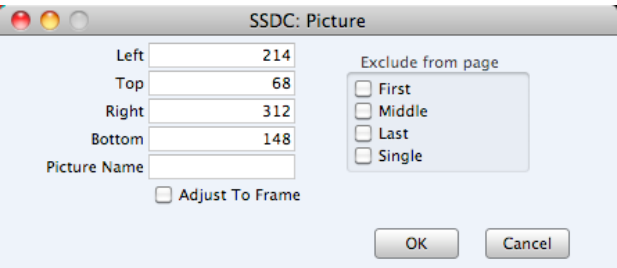
In the Picture Name field, enter the file name of the picture as it is on your hard disk. You can use 'Paste Special' to ensure that the file name is spelt correctly and that the path is correct.

The picture must be a PDF or PICT file. If you will use the Form to create pdf files, the only picture format that is supported is 24-bit BMP. This applies when the pdf file will be generated by Standard POS. Please refer to page 79 below for details about pdf generation. If you will use the Form to create pdf files and will also print it on a printer, you should have versions of each picture on your

computer in each format, and you should use the [Picture] button to include all versions in your Form design (i.e. you should have BMP and PDF/PICT picture objects in the same position in each Form). This will ensure the picture will always be printed correctly.

All picture file names should have the correct extensions.

When you design a Form, PDF and PICT pictures will be visible immediately in the Form editor. 24-bit BMP images will not be visible and instead will be marked by rectangular placeholders of the appropriate size.

Operations Menu

The Operations menu for Forms is shown below. It is available from the 'Form: New' and 'Form: Inspect' windows. There is no Operations menu for the 'Forms: Browse' window.
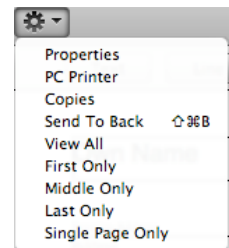
Properties

This menu command opens the 'Form Properties' dialogue box. Here you can record the basic specification of the Form you are creating or editing.
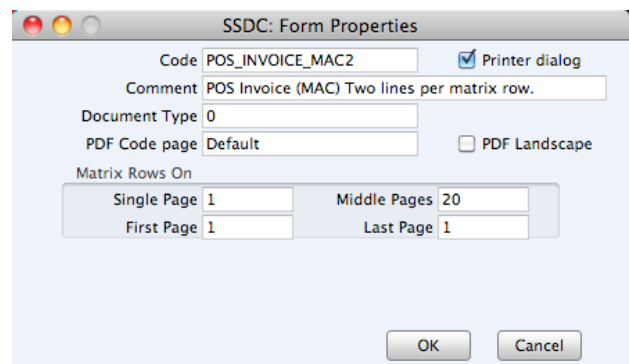
Code	Enter the unique code of the Form: this is the means by which the Form will be identified elsewhere in Standard POS. If you create a new Form by duplicating an existing one, you must enter a new Code before you can save it.
Printer dialog	Check this box to force a printer dialogue box to be shown each time the Form is printed. This dialogue box will allow you choose how many copies are to be printed, and also to choose the printer.
	In a POS Invoice Form, you will probably not want to use this option. Each time you (or a cashier) clicks or touches the "Finish" button in a POS Invoice, the Invoice will be printed automatically. It will probably be unnecessary for this automatic process to be interrupted by a printer dialogue box that requires your input every time.
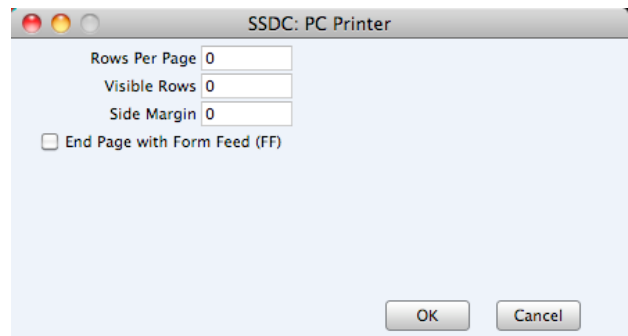
Comment   Enter text describing the Form here.

The Comment will be shown in the 'Paste Special' list that you will use when assigning Forms to documents, so it should be descriptive enough to make the selection of the correct Form easy for all users.

Document Type   **Paste Special**   Choices of possible entries

Using 'Paste Special', enter one of the available Document Types into this field. When the time comes to add fields to the Form, only the fields available for that Document Type will be available in the 'Paste Special' list in the 'Field' dialogue box.

PDF Code page   **Paste Special**   Choices of possible entries

If you will use the Form to create pdf files, specify here the code page that is to be used, if different to the default. For example, you may usually use the CP1252 code page, but you may need to use KOI8-R Cyrillic in a particular Form.

This applies when the pdf file will be generated by Standard POS. Please refer to page 79 below for details about pdf generation.

The default code page will depend on the language of the Standard POS interface you are using, as follows—

Language	Default Code Page
Estonian, Latvian, Lithuanian	CP1257
Polish, Hungarian, Slovak, Slovenian, Serbian	CP1250
Russian, Ukrainian, Byelorussian	KOI8-R
Others	CP1252

PDF Landscape   If you will use the Form to create pdf files, use this option if you would like those pdf files to be created in landscape format.

This applies when the pdf file will be generated by Standard POS, in which case a landscape format specified using the 'Page Setup' function on the File menu would not be applied. Please refer to page 79 below for details about pdf generation.

Matrix Rows On   Please refer to the 'Single- and Multi-Page Forms' section below on page 76 for details about these options.

PC Printer

If you are using a dot matrix printer, use this dialogue box to define the page size.
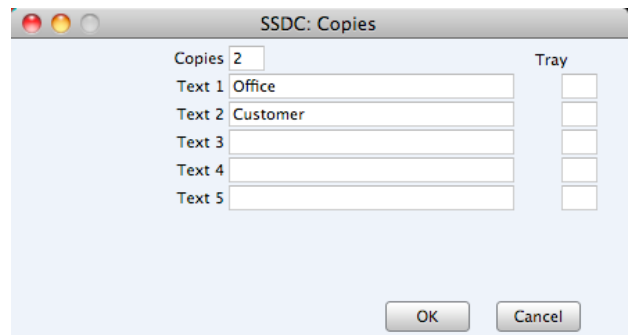
A dot matrix printer needs certain settings for printing on continuous stationery. If you are printing a document to pre-printed forms, you may need to define the number of rows in the page, the number of visible rows and the left margin for the forms used.

Copies

Use this function to specify how many copies should be printed each time the Form is used, the headings to be printed on each copy and the printer tray from which each copy is to be printed. If you want the headings to be printed, be sure to include the Copy Type field in your Form design. In the example illustrated above, we have specified that two copies of each POS Invoice will be printed: one marked "Office" and one "Customer". Only one copy (marked "Office") will be printed if the Invoice is not approved, and if an approved Invoice has already been printed.

Send to Back

If you want certain objects on the Form to appear behind other objects, click on them and select this function.

View All, First Only, Middle Only, Last Only, Single Page Only

These functions are described in the next section, 'Single- and Multi-Page Forms'.

Single- and Multi-Page Forms

When you design a Form, you should consider what is to happen when the printing of a document requires more than one page. Two options are available—

1. The "simple" option, where the same page design is used for each page.

2. The "multi-page" option allows the use of up to four page designs, as follows—

First	The first page of a multi-page document.
Middle	In a multi-page document, the pages between the first and last pages.
Last	The last page of a multi-page document.
Single	The sole page of a single-page document.
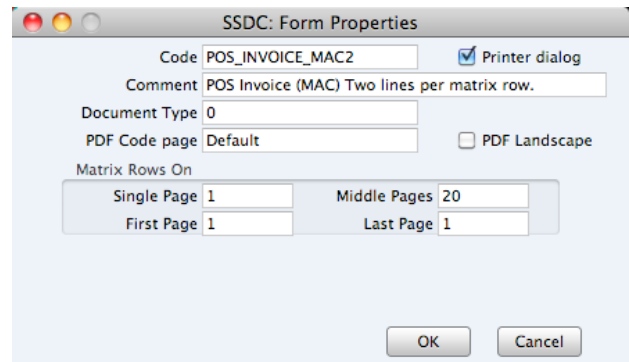
    Usually, the First and Single page designs will be the same.

When you add an object of any kind (i.e. text, line, frame or field) to a Form design, you can use the Exclude From Page check boxes to specify the pages on which the object is to be printed. If you do not check any of these boxes, the object will be printed on every page. This will be the case when using the "simple" option. If you want the object to be printed on certain pages only, check one or more of the boxes. For example, if the object is to be printed on all pages except the first, check the First box. If it is only to be printed on the first page, check all boxes except the First box (i.e. it will be excluded from all pages except the first). The text object in the illustration below will be printed on the first page only—
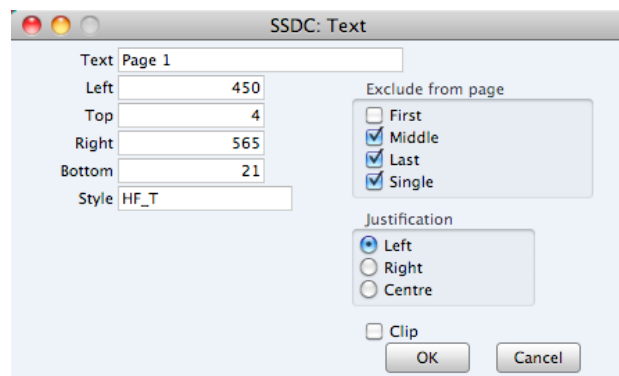
To help with the design process, you can choose to display the objects from a particular page. To do this, select 'First Only', 'Middle Only', 'Last Only' or 'Single Page Only' as appropriate from the Operations menu. For example, select 'First Only' to view the objects that are to be printed on the first page (i.e. those whose First box has not been checked). Select 'View All' to see all objects, irrespective of the page on which they are to be printed.

The number of pages printed will vary from record to record, depending on the number of rows that the record has. An Invoice with one Item will be printed on a single page (i.e. using those objects whose Single box is not checked). An Invoice with 100 Items (i.e. 100 rows) will be printed over several pages. You should specify the maximum number of rows that can be printed on each page by selecting 'Properties' from the Operations menu. This opens the 'Form Properties' window, which has four fields under the overall heading of Matrix Rows On—

In the case of the "simple" option, you should enter the same number to each of these four fields. Otherwise, enter different numbers as appropriate. For example, in an Invoice Form, First and Single are set to 5, Middle to 6 and Last to 7. Invoices will be printed as follows, depending on the number of rows—
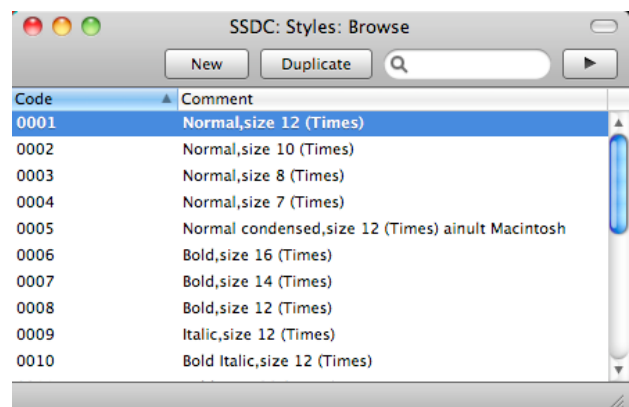
Invoice rows	Pages	Type of Page
Up to 5	1	Single
5-12	2	First and Last
13-19	3	First, Middle and Last
19-25	4	First, 2 x Middle, Last

Standard POS includes four sample Forms that use the multi-page feature to ensure that POS Invoices can be printed on continuous stationery on a USB receipt printer. If you need to design your own POS Invoice Form, it is strongly recommended that you use one of the supplied designs as a template.

Styles

Use the Styles setting to define the various font Styles that you will use in the Fields and Text objects in your Forms, ensuring a consistency of appearance.

To open the Styles setting, first click the [Settings] button in the Master Control panel and then double-click 'Styles' in the 'Settings' list. The 'Styles: Browse' window will open, listing the Styles you have previously entered.

Double-click a Style in the list to edit it. To enter a new record, click [New] in the Button Bar or use the ⌘-N keyboard shortcut. Alternatively, click on a Style similar to the one you want to enter and click [Duplicate] on the Button Bar. When the record is complete, save it by clicking the [Save] button in the Button Bar or by clicking the close box and choosing to save changes. To close it without saving changes, click the close box.
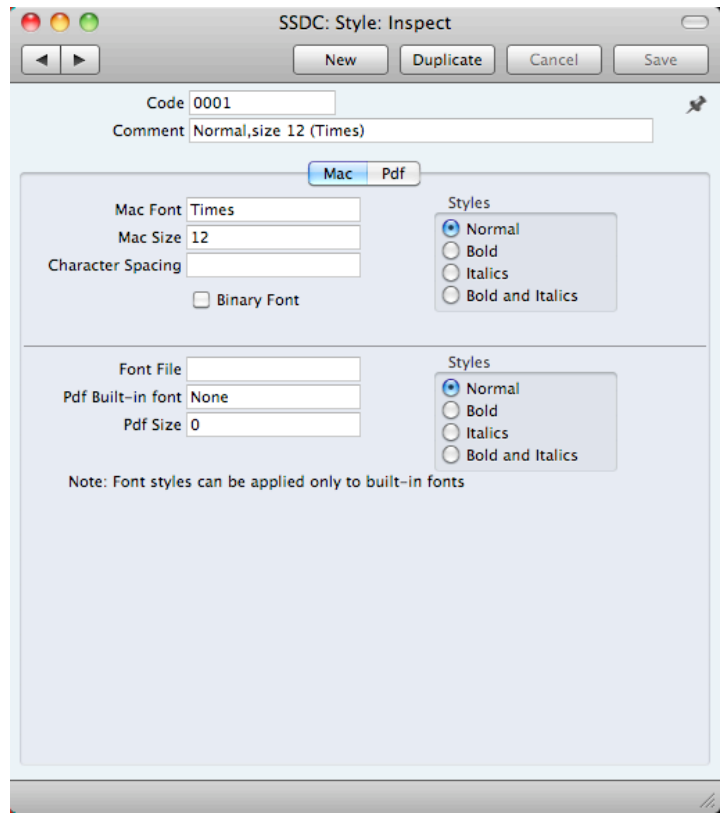
Header

Code   The code for the Style.

Comment   Any description.

The Comment will be shown in the 'Paste Special' list that you will use when assigning Styles to Fields and Text objects in Forms, so it should be descriptive enough to make the selection of the correct Style easy for all users.

Mac Card

Mac Font   **Paste Special**   Fonts available on your computer

Specify the name of the font.

Mac Size   Specify the font size in points.

Styles   Select one of the available style types.

Character Spacing You should use this field in Styles that will be used when printing bank giro forms, where a fixed character spacing is required. Specify here the spacing in pixels from the start of one character to the start of the next. Usually this will be six pixels or less.

You can only use Styles with a Character Spacing 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.

Pdf Card

If you will use a Style in a Form that you will print to pdf files, you should also fill in the fields on the 'Pdf' card, especially if the Style uses a non-standard font. The standard fonts are Times, Helvetica, Courier, Symbol and Zapf Dingbats. Most pdf readers are able to read and print these fonts. If the Style uses a non-standard font, you should use the 'Pdf' card to ensure that the font will be embedded in pdf files, so that those files have the correct appearance when opened and printed by pdf readers. This is particularly important for barcode fonts.

You can create pdf files from Standard POS using two methods—

1. Open a record, click the Printer icon and, when the printer dialogue box appears, choose to print to pdf. In this case, the pdf will be generated by the operating system, which embeds fonts as necessary.

2. Click the [Documents] button in the Master Control panel, double-click a document in the list and choose 'Pdf' as the Media option in the specification window.

   In this case, the pdf will be generated by Standard POS, which will embed fonts following the instructions on the 'Pdf' cards of the relevant Style records.

   If a Pdf file is generated by Standard POS and you find that the Times font has been used where you are expecting a different font, then it is likely that you need to use the 'Pdf' card in the relevant Style record to embed the intended font in the Pdf file.

Font File	Paste Special	Opens the standard 'Open File' dialogue that you can use to locate the font file

Use 'Paste Special' to specify the path to the font file.

The font file must be an OpenType font with the .ttf extension or a Type 1 Post Script font with the .afm or .pfa extensions. Other font formats are not supported.

Pdf Built-in font	Paste Special	Choices of possible entries

If you want to embed one of the standard fonts in pdf files, specify that font here. This will usually be because the Style uses one of the standard fonts and you want to embed that font in pdf files. This will help ensure the Style prints as you expect, but will also slightly increase the size of the pdf file.

If you specify both a Pdf Built-in font and a Font File in the field above, the Pdf Built-in font will be used.

Pdf Size   The font size in points.

Styles   Select one of the available style types.

If you specify a font on the 'Pdf' card, you should also specify a Mac Font. When you use the Style in a Form design and print the document to a printer or preview it to screen, the Mac Font will be used. The Pdf font will only be visible in pdf files.

Note that the .ttf extension does not guarantee that the font is an OpenType font, as this extension is also used with TrueType fonts. You can confirm the font format using the Font Book application. If there is still a problem, the Pdf font will not be visible in a pdf file and will be replaced by Times.

If you will use a Form to create pdf files, as well as specifying the fonts that will be embedded as described here, you should also specify a PDF Code page for that Form and, if appropriate, specify that pdf files will be created in landscape format. Please refer to page 73 above for details.

Document Definition

You must assign a Form to each document before you print it for the first time. The Form is the design or layout of the document. For example, if you have designed a Form with the Form Code of "POS_INVOICE", you need to connect it to the POS Invoice document so that the Form will be used when you print the document. You can have a single Form for each document, or you may have several versions of a particular type of document, to be used on different occasions.

To assign a Form or Forms to a document, follow these steps—

1. Click the [Documents] button in the Master Control panel or use the ⌘-D keyboard shortcut. The 'Documents' list window is opened showing a list of available documents. Highlight the document that you need to define ('POS Invoices' in the example).

2. Select 'Define Document' from the Operations menu.

3. Enter the Form Code (e.g. "POS_INVOICE") in the Form field. Use the 'Paste Special' feature to see the available forms in your Form register and to ensure the spelling is correct.
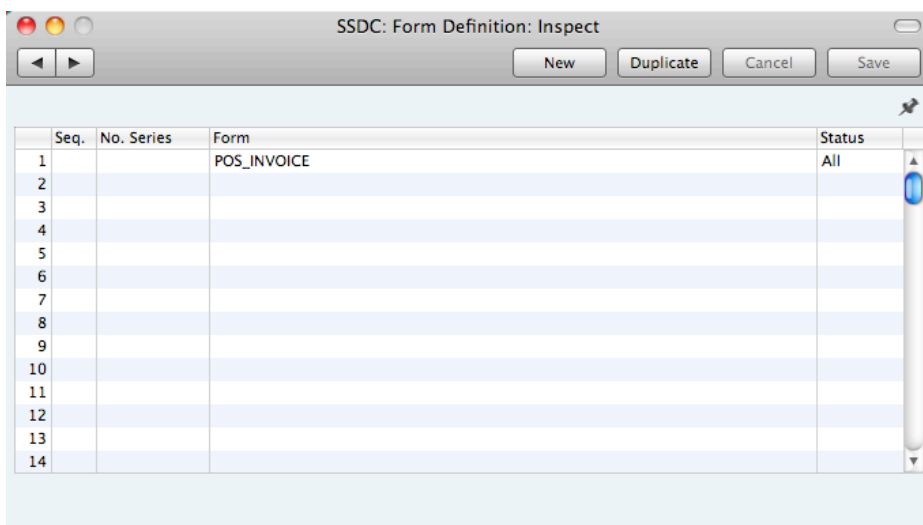
4. Click [Save] to save the POS Invoice definition. From now on, whenever POS Invoices are printed, the "POS_INVOICE" Form will be used.

POS Invoices

Use this document to print a POS Invoice or a range of POS Invoices. This document will also be printed automatically each time you click or touch the "Finish" button to close a POS Invoice.

No.	**Range Reporting**	Numeric

Enter a POS Invoice Number (or range of POS Invoice Numbers) for which documents are to be printed. Documents will only be printed for Invoices in the range that have not previously been printed.

Reports

Introduction

To print a report, follow these steps—

1. Use the [Reports] button in the Master Control panel or the ⌘-R keyboard shortcut to open the list of reports.
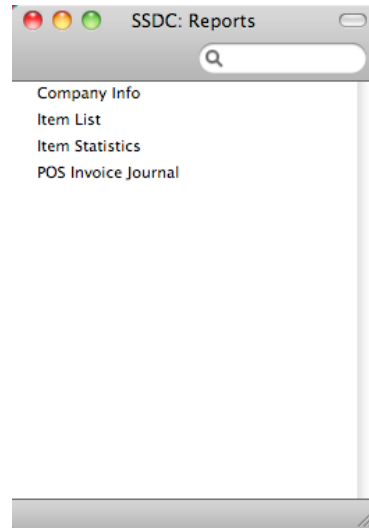
2. Choose a report by clicking an item in the list once. If you need to set the page size, number of copies and other printer options for the report, choose 'Page Setup' from the File menu. You can also use this function to choose the printer on which the report is to be printed. These settings will be used whenever you print the particular report until you choose 'Page Setup' once again.

3. Double-click the report that you want to print. A dialogue box (or "specification window") will open, where you should specify what you want to be included in the report, and where you want the report to be printed. Illustrated on the next page is the specification window for the POS Invoice Journal report.

4. Leave all the fields in a specification window blank if the report is to include all the records in the database. If you need to restrict the coverage of the report, use the fields as described individually for each report.

    You can often report on a selection range selection range, such as a range of Invoices, or a range of Items. To do this, enter the lowest and highest values of the range, separated by a colon. For example, if a specification window includes an Invoice No. field, you will be able to report on Invoices 1 to 10 by entering "1:10" in that field, as illustrated above. Depending on the field, the sort used might be alpha or numeric. In the case of an alpha sort, a range of 1:2 would also include 100, 10109, etc.

    You can often use 'Paste Special' (⌘-Enter) to enter values in fields in specification windows. In the example illustrated above, you can use 'Paste Special' to choose a Period, a Salesman, and a Payment Mode. In a field where you can enter a range, type the colon before opening the 'Paste Special' list for the second time. This will cause the second value to be added to the one already entered. Otherwise, the previous value will be overwritten.

    The specification window also allows you to choose the destination of the printout. To do this, select one of the Media options at the bottom of the window. If you print to file, the contents of the report will be saved as a text file that you can then open in most word processors and spreadsheets. If you print to screen (the default setting), you will subsequently be able send the report to a printer by clicking the Printer icon at the top of the window containing the report or by selecting 'Print' from the File menu.
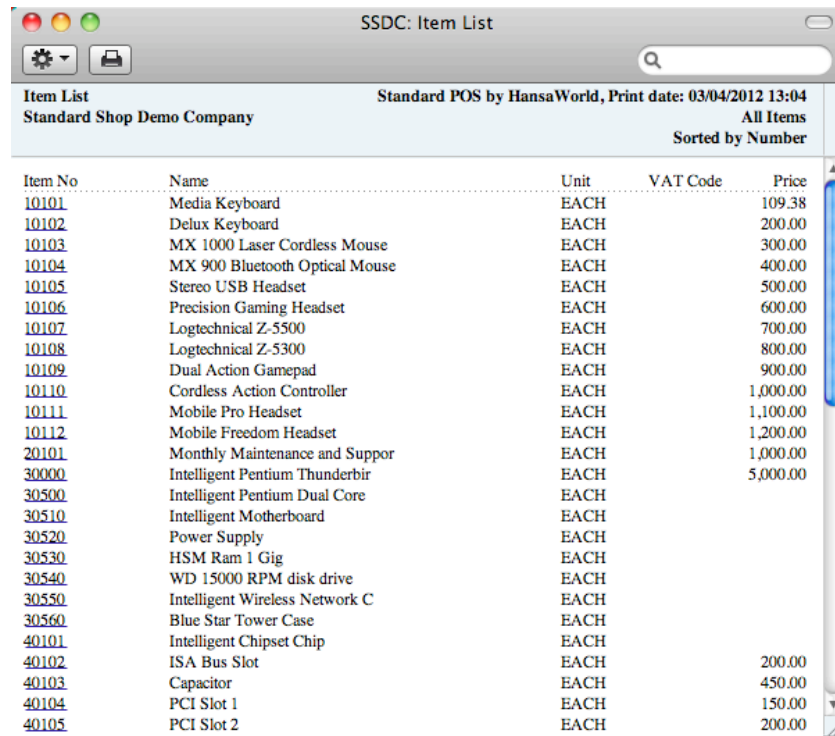
    If you want a print dialogue to appear when you send the report to a printer, check the Print Dialogue box. You might do this if you want to print several copies of a report.

5. Once you have entered the reporting criteria and have chosen a print destination, click the [Run] button to produce the report.

The Report Window

If you print a report to screen, it will be shown in its own window, known as a "Report Window". You can print several reports to screen at the same time, totally independently. You can for example show two versions of the POS Invoice Journal simultaneously, in two different windows. Since windows in Standard POS are completely independent, you can have report windows, record and browse windows and lists all open at the same time.

Below is shown an example Item List report—

You can scroll up and down through the report using the scroll bar, the trackpad or the PgDn, PgUp, Home and End keys on the keyboard.

Searching in Reports

A useful function built in to every report in Standard POS when you print to screen is the ability to search for a text string in a report. The search string can contain any sequence of letters and digits occurring in the report.

In this example you might want to search for Items representing the Streamline range of bicycles. Enter "Streamline" into the Search field on the right of the Button Bar and press the Return or Enter key. The first text string in the report that matches the search string will be highlighted. Press the Enter key again to find the next match.

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 any of these changes will affect the contents of the report, you can easily update the report without closing and recreating it. Simply bring the report window to the front and select 'Recalculate' from the Operations drop-down menu (or use the ⌘-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' from the Operations menu instead (or use the ⌘-Shift-E keyboard shortcut).

Drill-down

Many reports include a drill-down feature when you print them to screen. For example, when you have an Item List report on the screen, you can click on any Item Number in the report. The Item record will open, as illustrated below—
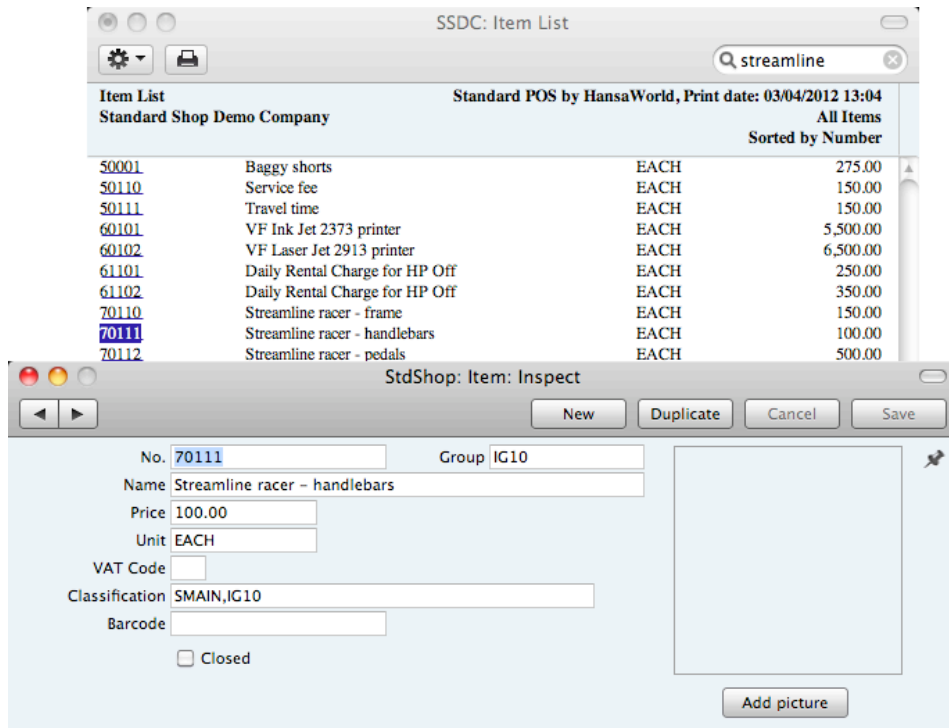
Text with the drill-down feature is shown underlined in a screen report.

Printouts

If you print a report to screen, you can then print it 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.

Company Info

This report is effectively a print-out of the Company Info setting.

To print this report, click the [Reports] button in the Master Control panel and then double-click 'Company Info' in the 'Reports' list. There is no specification window for this report, so print it by clicking the [Run] button.

Item List

This report is a list of Items, displaying for each one the Item Number, Name, any Group membership, Unit, VAT Code and the sales Price.

When printed to screen, the Item List has the Drill-down feature common to many reports in Standard products. Click on any Item Number to open the corresponding Item record.

Leave all the fields blank if the report is to cover all the Items in the Item register. If you need to restrict the coverage of the report, use the fields as described below.

Item No.	Paste Special	Item register
	Range Reporting	Alpha

Use this field to limit the report to a single Item, or range of Items.

Sorting	The report can be sorted by Item Number or Description.

Item Statistics

This report is a list of the Items you have sold during the report period (i.e. Items included in Finished POS Invoices from that period). This list displays sales statistics from that period for each Item (turnover and quantity sold). The report period is the first period in the Reporting Periods setting.

When printed to screen, the Item Statistics report has the Drill-down feature common to many reports in Standard products. Click on any Item Number to open the corresponding Item record.

Leave all the fields blank if the report is to cover all the Items in the Item register. If you need to restrict the coverage of the report, use the fields as described below.

Item   **Paste Special**   Item register

                 Range Reporting   Alpha

Use this field to limit the report to a single Item, or range of Items. Only Items in the range that have been sold (i.e. included in POS Invoices) during the report period will be shown in the report.

POS Invoice Journal

This report is a chronological listing of the POS Invoices issued during the specified period. You can control the selection to show a range of Invoice Numbers or Invoices issued by a particular Salesman (i.e. cashier).

When printed to screen, the overview version of the POS Invoice Journal has the Drill-down feature common to many reports in Standard products. Click on any Invoice Number in the report to open an individual Invoice record.

Invoice No   **Range Reporting**   Numeric

Limit the report to a single or range of POS Invoices.

Period   **Paste Special**   Reporting Periods setting

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

Salesman   **Paste Special**   Persons setting

If necessary, limit the report to a single Salesman by entering a Person's Signature here. The Salesman of a POS Invoice is the cashier logged in at the time the Invoice was processed (unless it was explicitly changed using the "Select Salesman" button).

Payment Mode   **Paste Special**   Payment Modes setting

If you want to restrict the report to POS Invoices with a particular Payment Mode (i.e. payment method), specify that Payment Mode here.

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

      Overview   This choice gives a report with one row per Invoice, showing the Invoice Number, Date and Total (both excluding and including VAT).

      Detailed   In addition to the information shown above, this option lists the Items on each POS Invoice, showing the Item Number and Name, Quantity, Unit Price, discount %, Sum and VAT Code are shown. You can use this report as an archive file instead of a copy of each Invoice.

Show values per VAT (only in detailed mode)

This option adds an extra section to the detailed version of the report. This section shows the total VAT amounts for each VAT Code.

Shutting Down and Backing Up

Remember to make a back-up before shutting Standard POS down.

To shut Standard POS down, select 'Quit' from the Standard POS menu. You can also use the ⌘-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 POS is done, we advise you to make a back-up. It is a good idea to save a copy of the file on a separate hard disk or CD-ROM 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 POS 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, receipts, reports etc. Make sure you make a back-up each time you have been working with your accounts. 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.

The method of backing up that is built in to Standard POS is fast and economical. The data will be saved in a back-up file that takes up a minimal amount of space, and the back-up files are independent of the program versions. This means that restoring from a back-up file will be successful, even if you have updated the version of your Standard POS application since making the back-up. This is known as the "text back-up" method of backing up.

! ***Use the back-up feature built in to Standard POS to guarantee a successful restoration.***

You can also copy the database file as it appears on your hard disk. While copying the database file can play an important part in your back-up strategy, note that restoring from a copied database will not be successful if you have updated the version of your Standard POS application since making the duplicate.

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

! ***Regularly check that you can restore from your back-up files.***

To create a text back-up, follow these steps—

1. Click the [Routines] button in the Master Control panel. A list of routines appears—

2. Click the [Exports] button in the list of routines to open the list of Export functions. You can also use the ⌘-E keyboard shortcut to open this list.
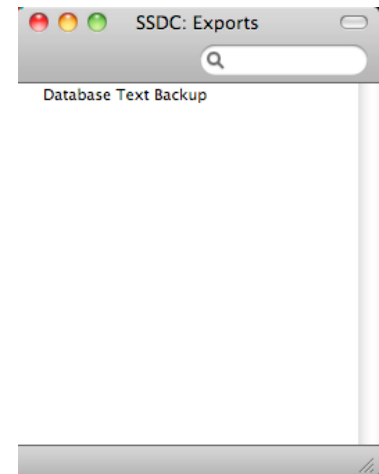
3. Double-click 'Database Text Backup'.

4. The 'Specify Text Backup' window appears. Here you can enter a description of the back-up file that you are about to create. You can use up to 40 characters. If you later need to restore from a back-up, this description will be shown in the list of importable files to help you select the correct one.
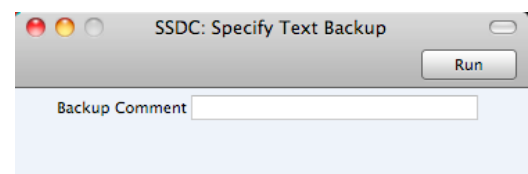
    Enter an appropriate description and click [Run].

5. 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 folder or directory in the usual way. 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 give the file name 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.

! ***Under no circumstances should you edit or change a back-up file with another program.***

Restoring from a Back-up

Restoring from a 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.

Follow these steps—

1. Locate the "Standard POS.hdf" file on your hard disk. It will be stored in Home/Library/Application Support/Standard POS 6.3 UK.

    Note that Home/Library is an invisible folder in OS X 10.7 (Lion). To open it, go to the Finder and select the Go menu while holding down the Option (Alt) key. Select 'Library' from the menu.

2. Hold down the Ctrl key on your keyboard and click on the .hdf file. When the menu appears, choose 'Show Package Contents'. A window will open, listing the contents of the "Standard POS.hdf" file. Move the "HANSA.HDB" file out of the package. If you need to restore your database using a text back-up file stored in the "Backup" folder in the package, move this text back-up file out of the package as well.

    Leave the "Attach" folder and its contents in place, otherwise all attachment links will be lost after restoring.

3. Double-click the Standard POS application. As there is no "HANSA.HDB" file in place, a new database will be created.

! ***It is important to restore to a new, empty database, to avoid mixing the restored data with the old, damaged database.***

4. When the 'Welcome' window appears, click the [Import Backup] button—
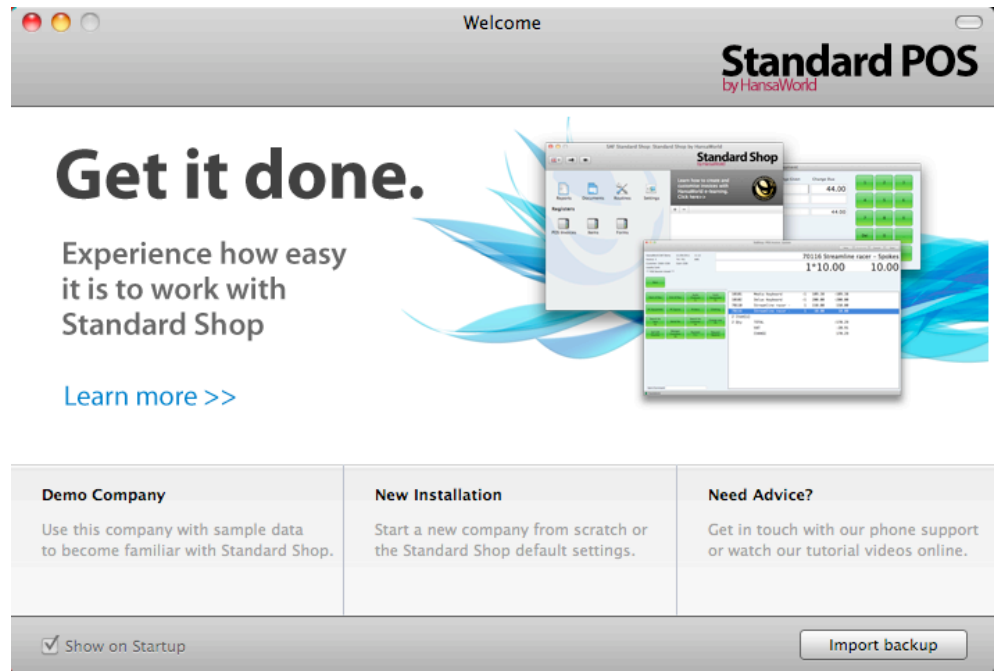
5. When the 'Open File' dialogue box opens, locate and open the back-up file in the normal way. The back-up data will be imported.

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