W&O Retail POS User Guide

V2.0.1

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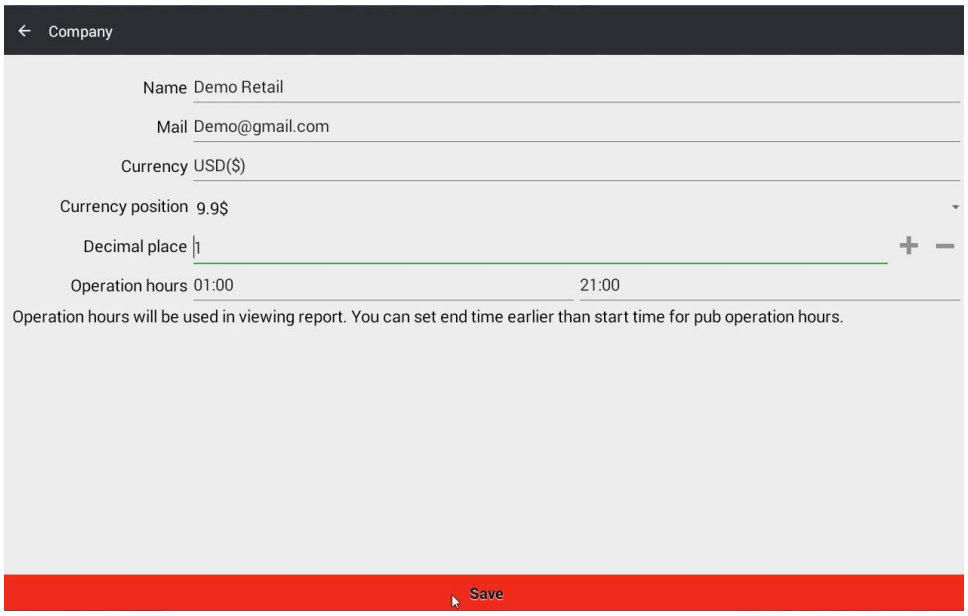
Chapter 1: Store Settings

The first task of setting up Retail POS is completing your Company profile. Tap Settings > Company.



You can setup Store Name, Email, Currency and Decimal Place. Ensure anything entered here is appropriate for public consumption, and their formats are correct. The email entered here will be the default email when you send report on W&O POS.

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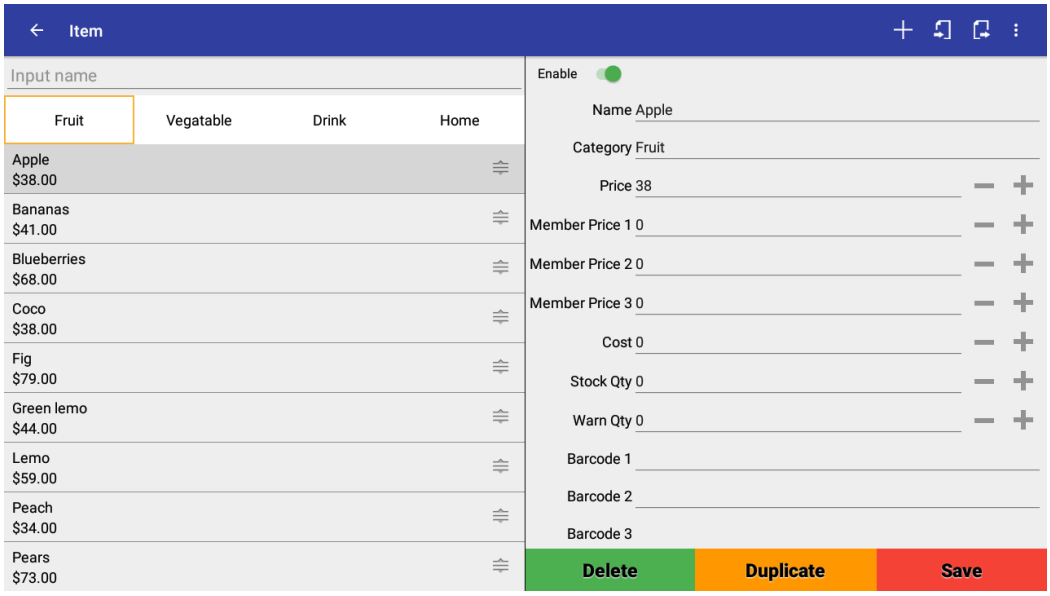
Chapter 2: Setting Up Your Product

2.1 Setting Up Category

You can manage Category by Add, Update and Delete. We also provide Import and Export help you easy create categories. You can event set Background Color and Position of the category. You cannot delete Category if the order is using and has not closed yet.

2.2 Setting Up Your Item



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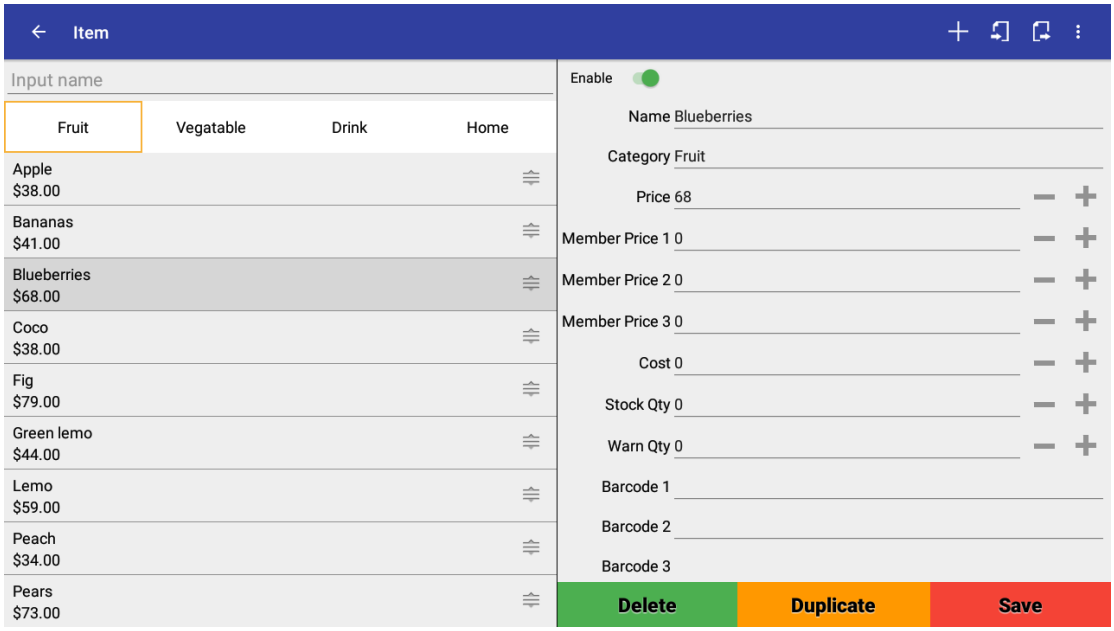
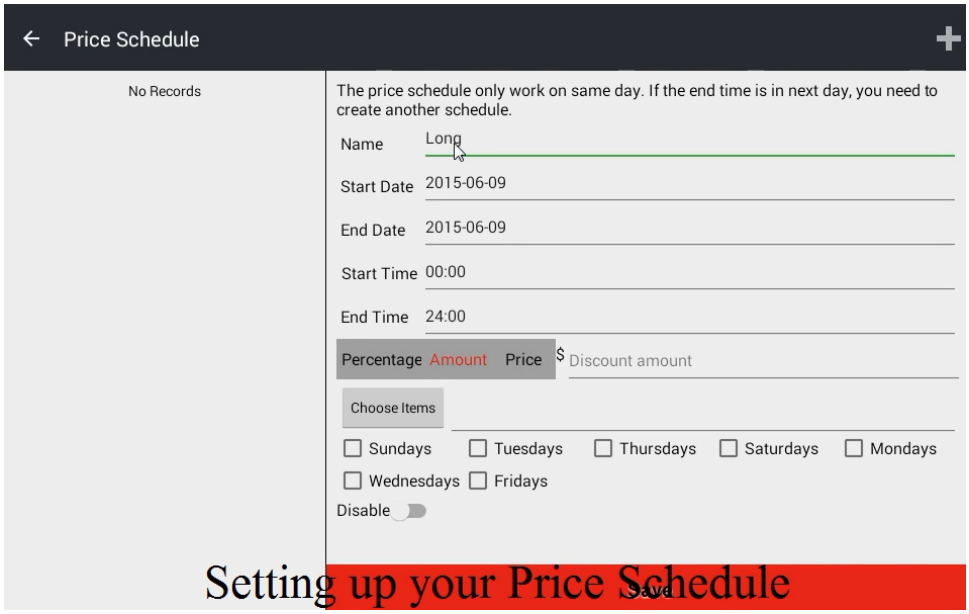
You can manage Item by Add, Update and Delete. We also provide Import and Export help you easy create items.



You can change the sequence of the items by pressing it and dragging it to wherever you want. Also, Cost and Stock QTY fields will disappear once you set up the inventory function, and you can manage them in the Inventory Management.

2.3 Setting Up Your Price Schedule



You can manage Price Schedule by Add, Update, Delete, Enable and Disable. The Price Schedule is used to adjust price of specific Item at specific day and time. Remember to tap the switch on the bottom to enable your price schedule.

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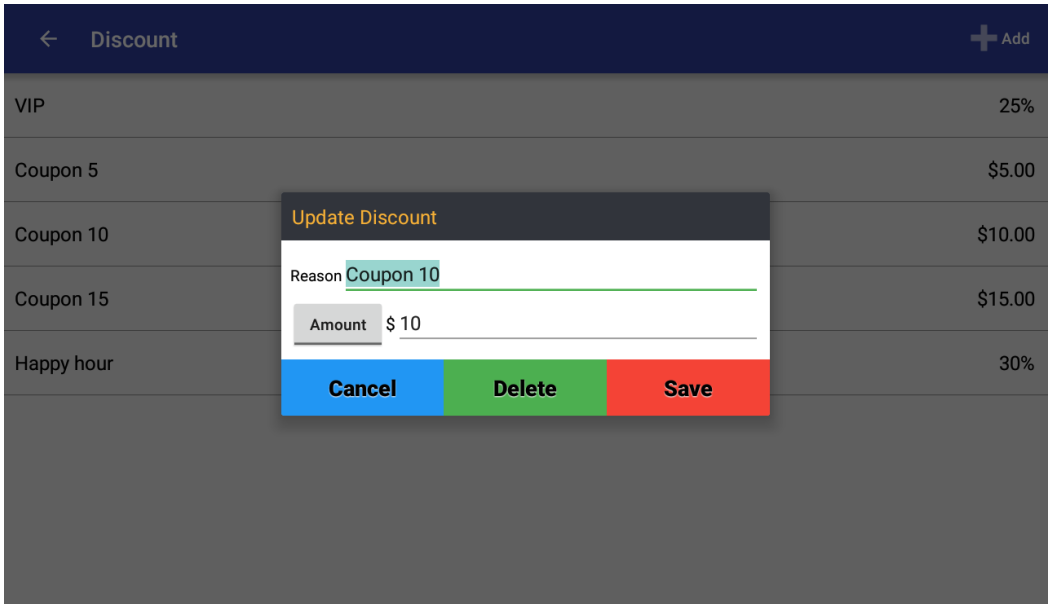
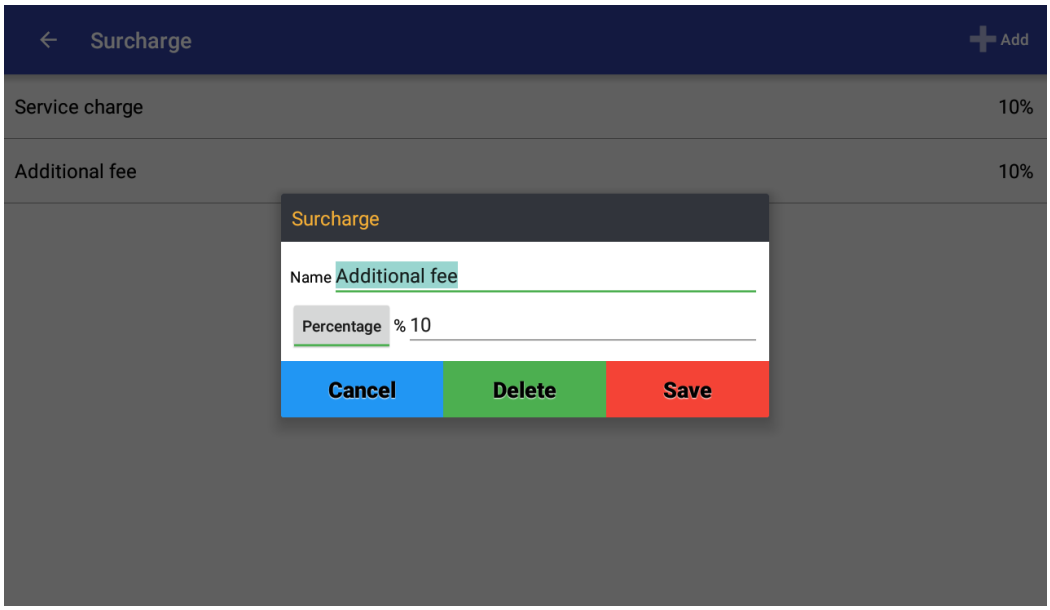
2.4 Setting Up Your Discount



You can preset Discount with percentage or amount. Tap the amount icon and you can change to percentage.

2.5 Setting Up Your Surcharge



You can preset Surcharge with percentage or amount.

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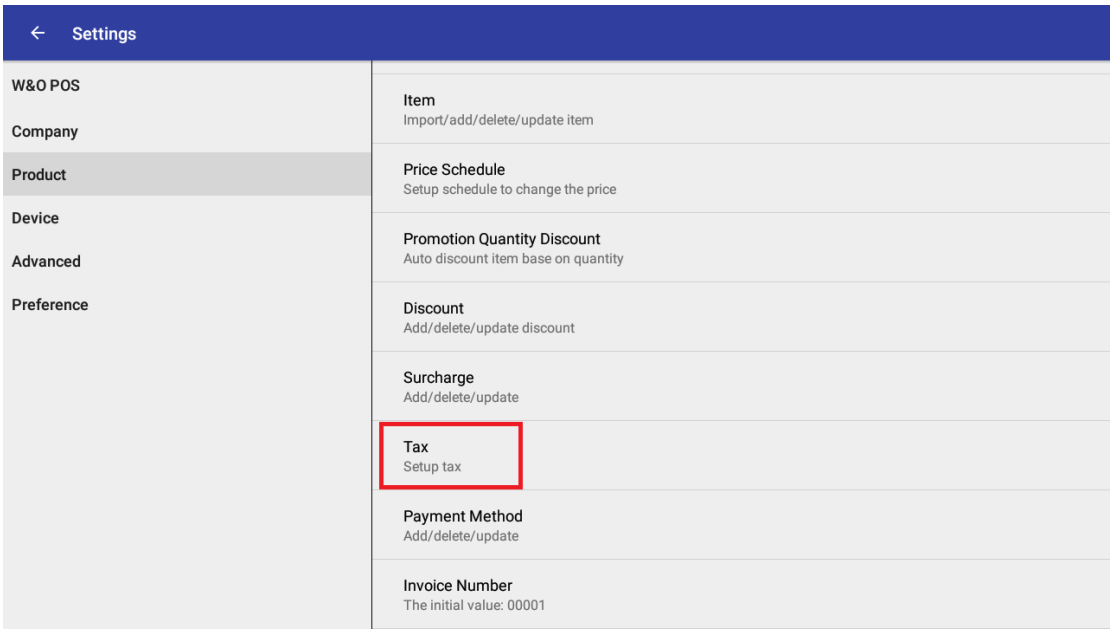
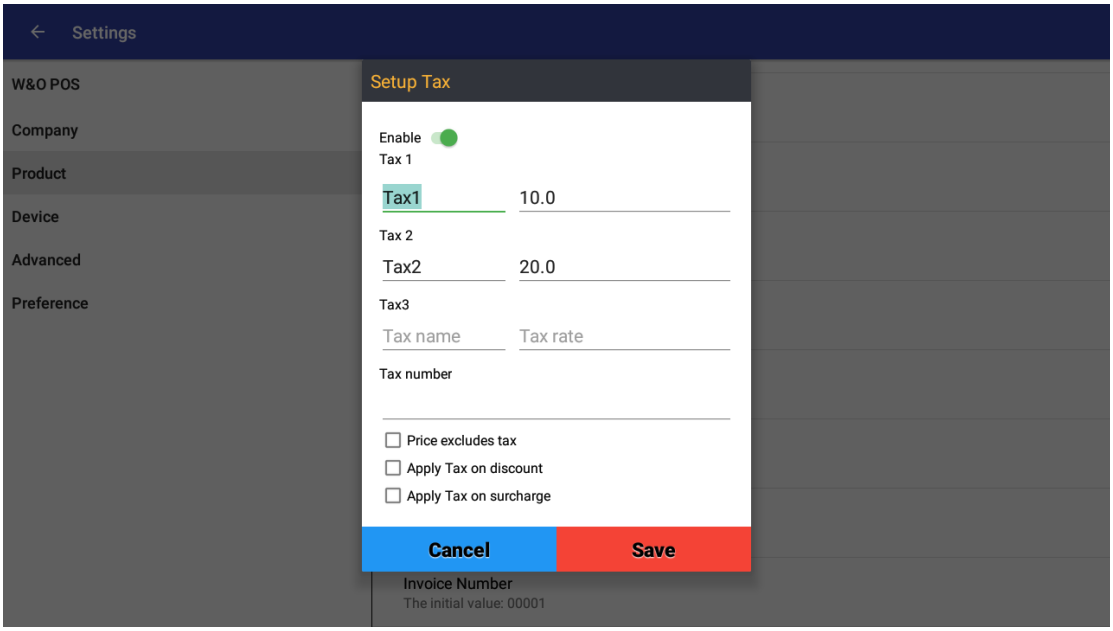
2.6 Setting Up Your Tax

W&O POS supports menu prices Include Tax or Exclude Tax. Here shows how to setup Include Tax.

1. From the Menu, go to Settings>Product>Tax.



2. Input Tax Name and Tax Rate. And Choose Item Price Includes Tax.



3. Then assign Tax to Item

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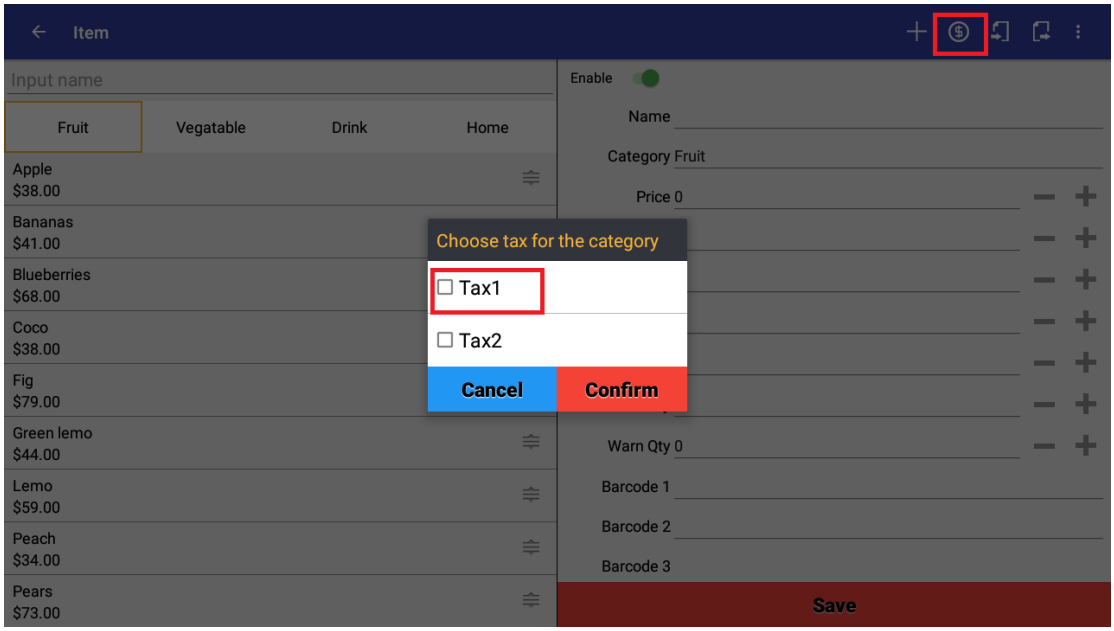
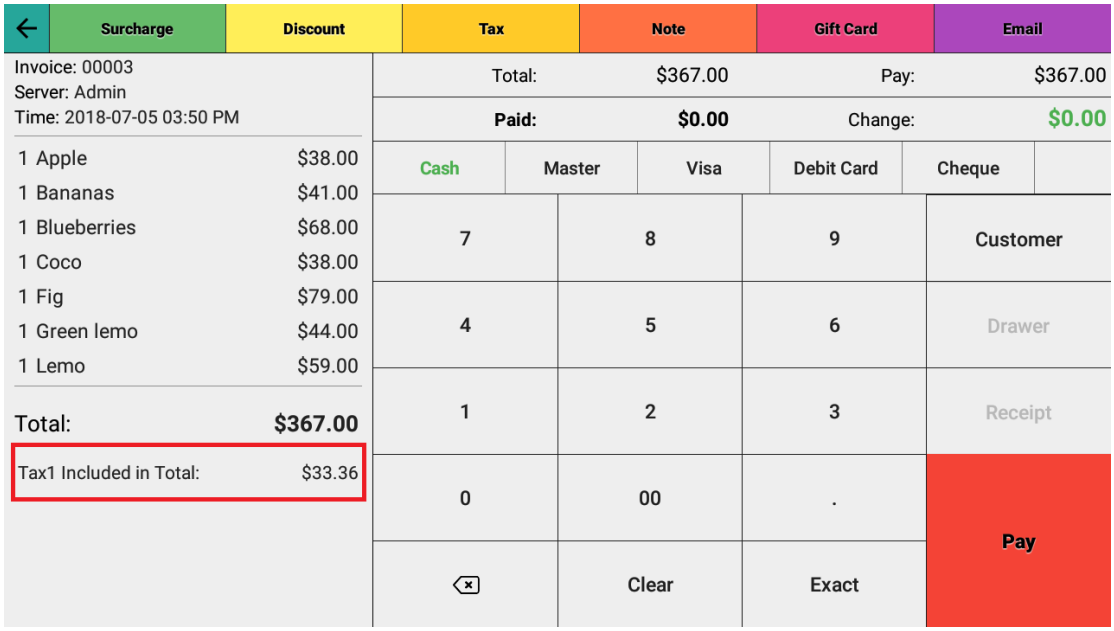


4. When you close the order, the tax is included in the menu price. The tax amount is showing for reference.



Here is how to setup Exclude Tax. In the Setup Tax, choose Item Price Excludes Tax.

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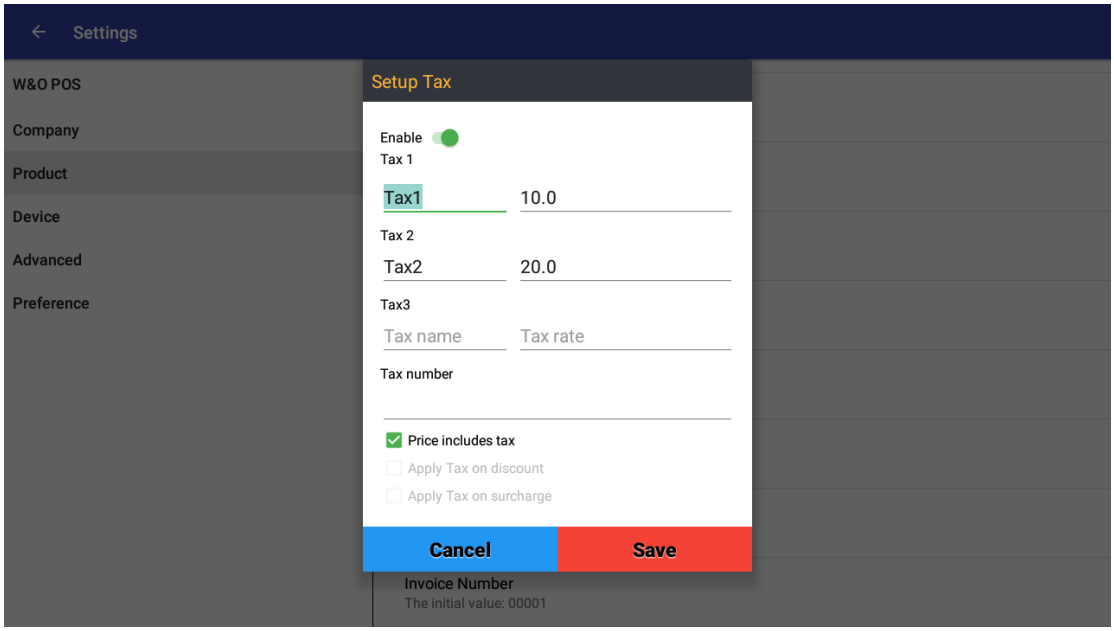
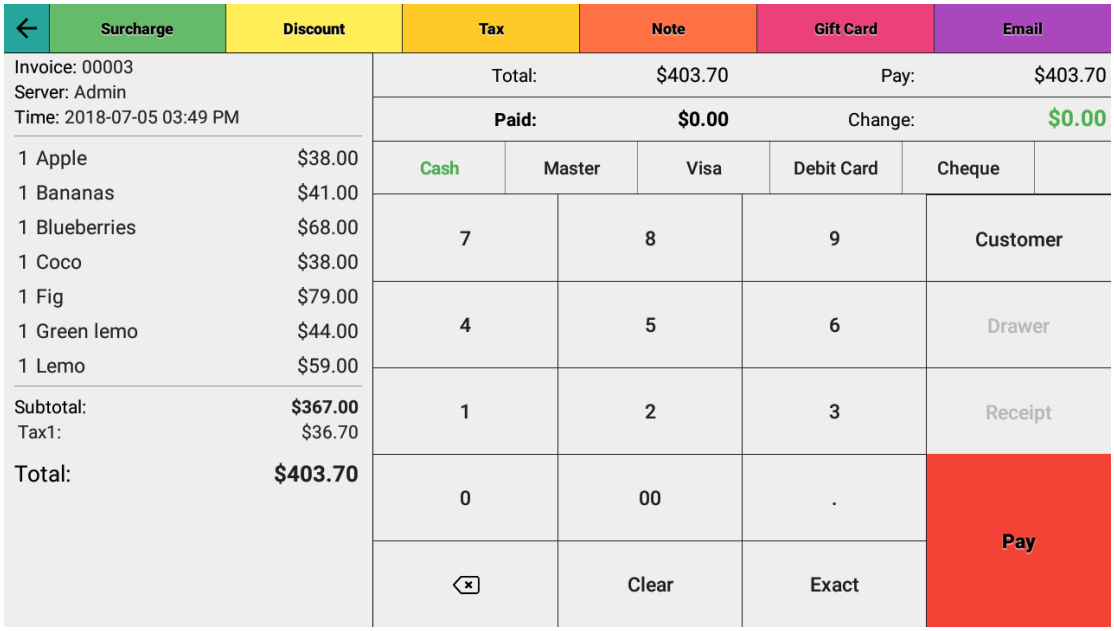


Then when you close the order, the tax is excluded in the menu price. The tax amount is calculated and adds to the total amount.



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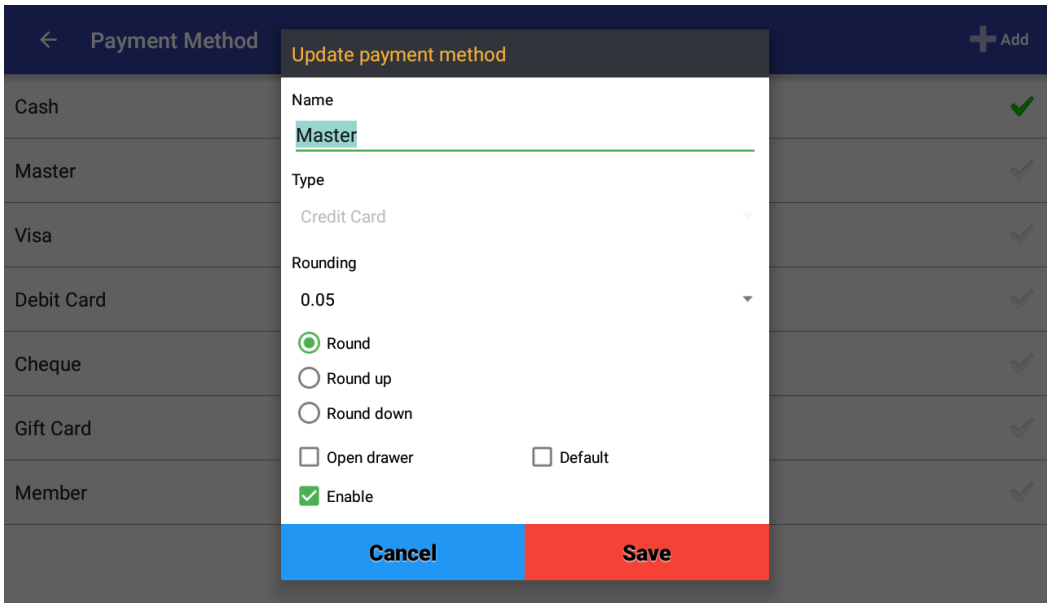
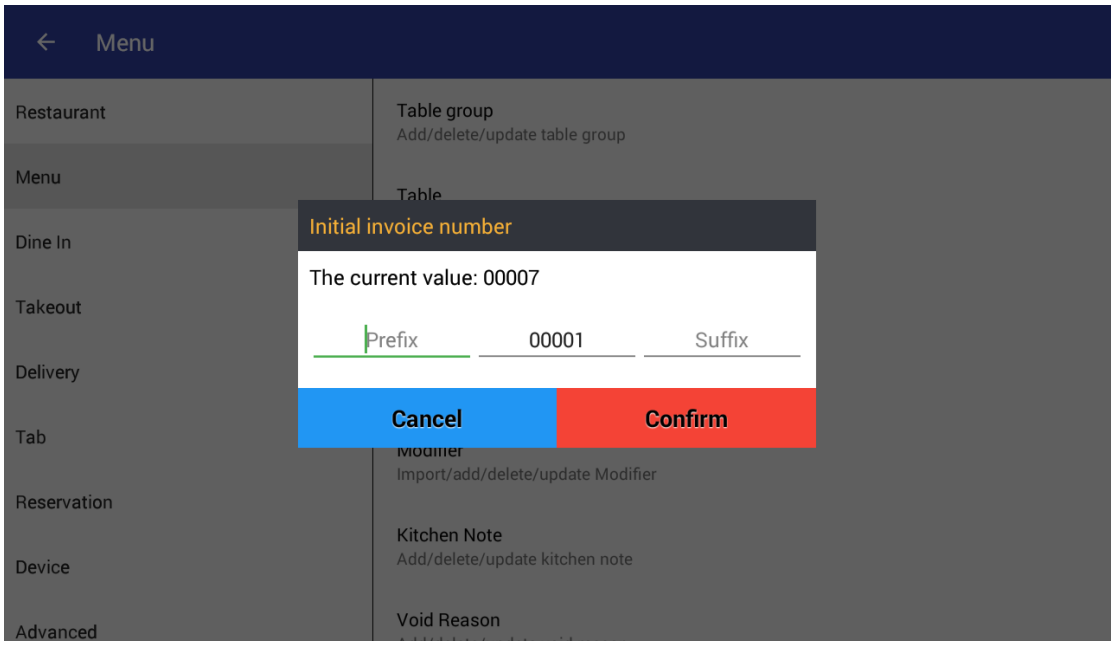
2.7 Setting Up Your Payment Method



You can manage Payment Method by Add, Update and Delete. If the Open Drawer is checked, the cash drawer will be opened when you close Order. You can also setup Rounding.

2.8 Setting Up Your Invoice Number



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You need to setup Initial Invoice Number. The Prefix and Suffix cannot be empty, and the length of Order Number is no more than 13 digits. The Invoice Number will increase by 1 when you make new Order.

Distinguished from the Order Number, the Invoice number is shown to the customers, thus you can find it in the ordering and ordered screen, the receipt, and the Orders screen.

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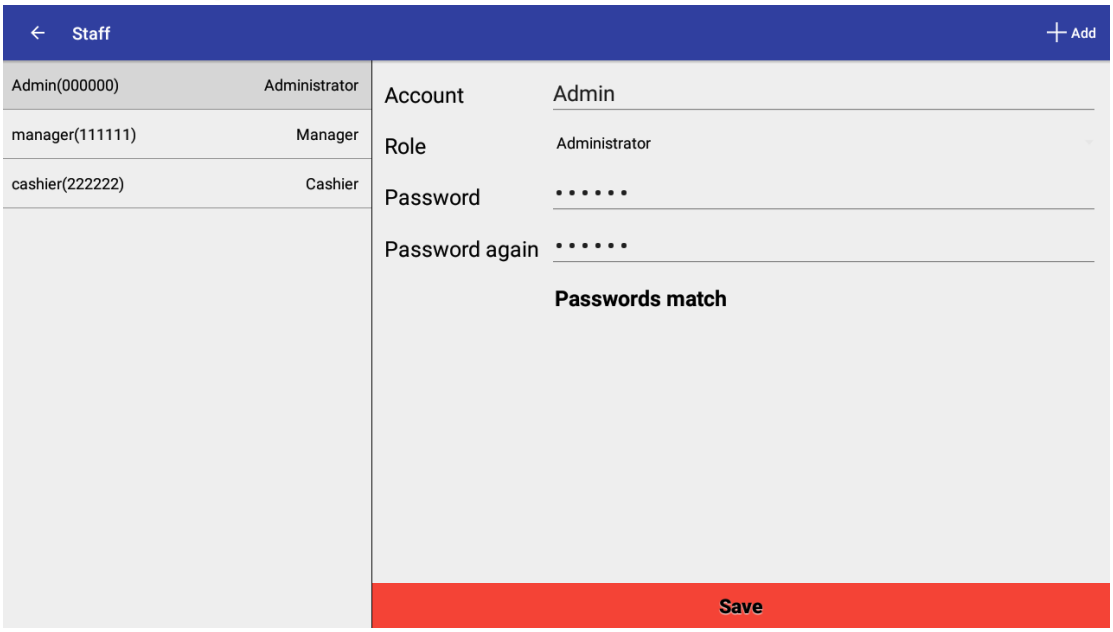
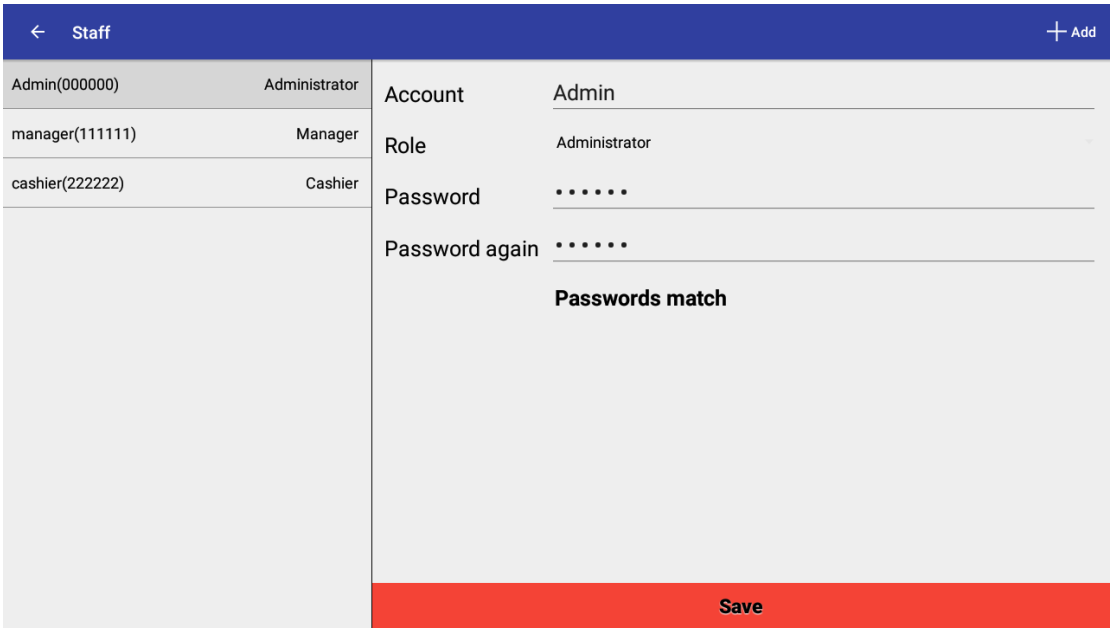
Chapter 3: Manage Employee

3.1 Setting Up Your Staff



You can manage Employee by Add, Update and Delete. The password must be unique.



When enabling the Use Staff Salary option in the Settings -> Advanced -> Others, you can see the field called Hourly Pay in the Staff screen. Once you input the hourly pay, you can see the salary of the staff in the Clock screen.

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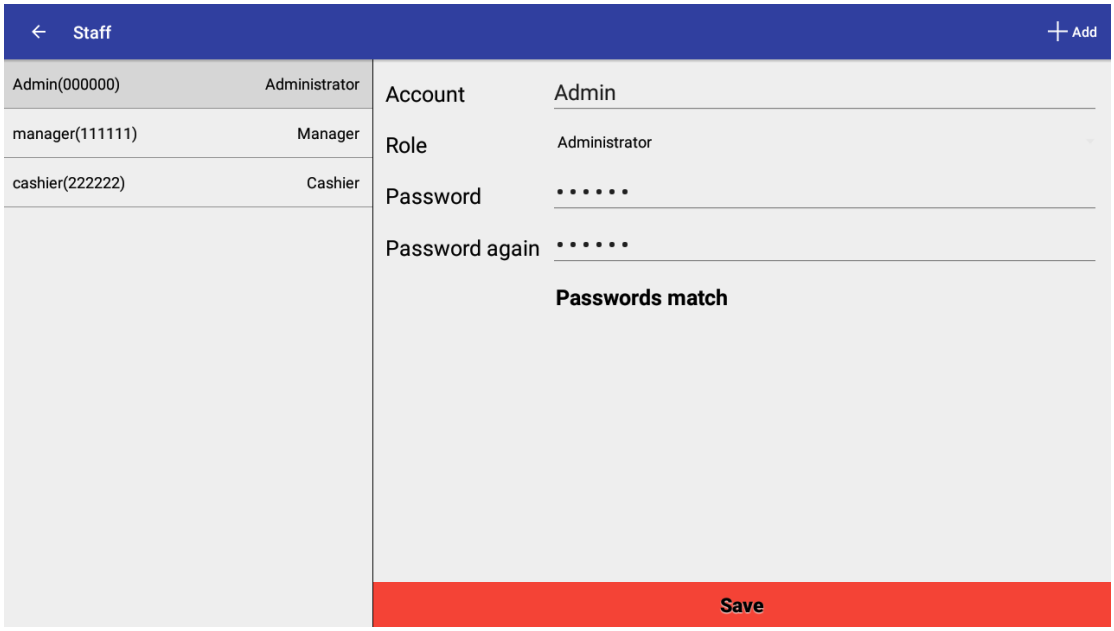
3.2 Setting Up Your Role Permission



The Role Permission is used to manage Employee permission. Once you check the check box, it means that the staff can see and use this function.

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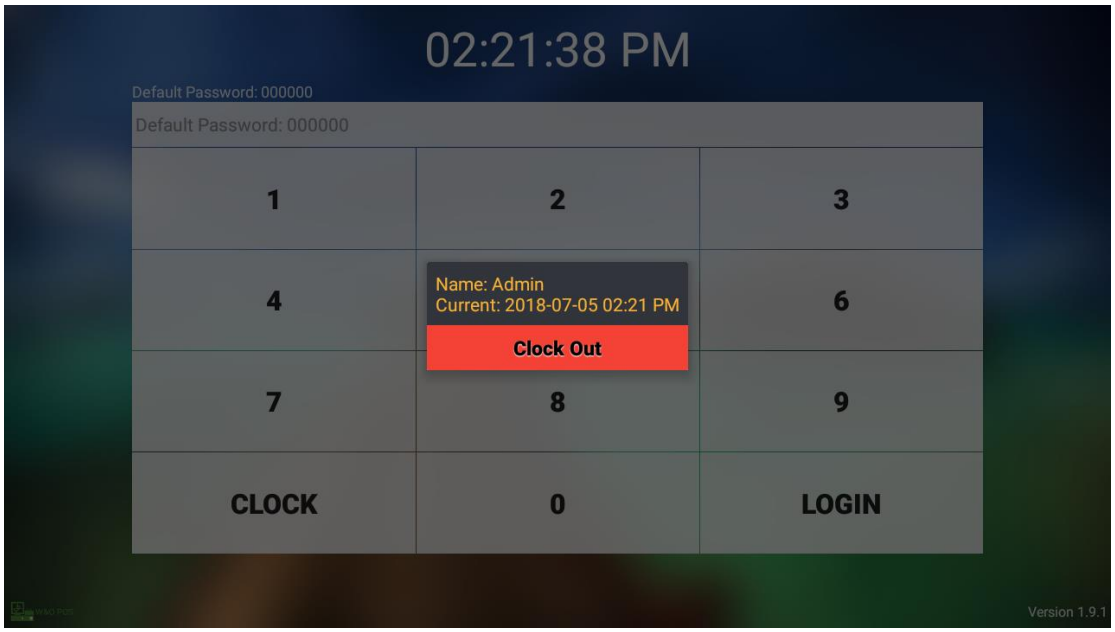
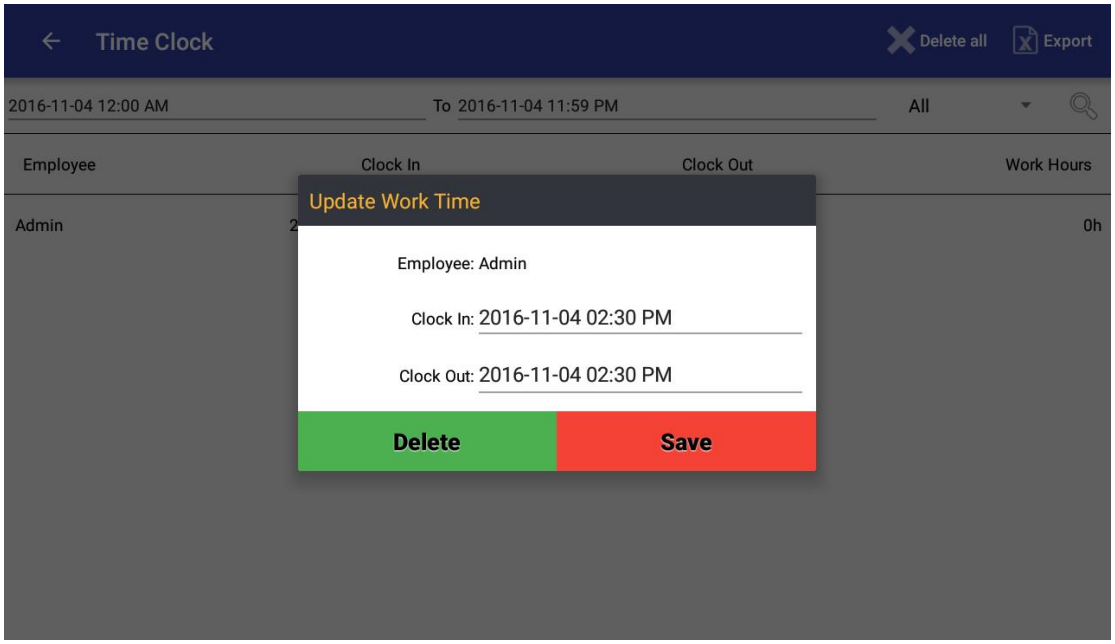
Chapter 4: Time Clock

4.1 Time Clock



You can use Time Clock to Clock in/out or log in. For example, if you want to clock in, you can enter the password and click the Clock.

4.2 Time Clock Report



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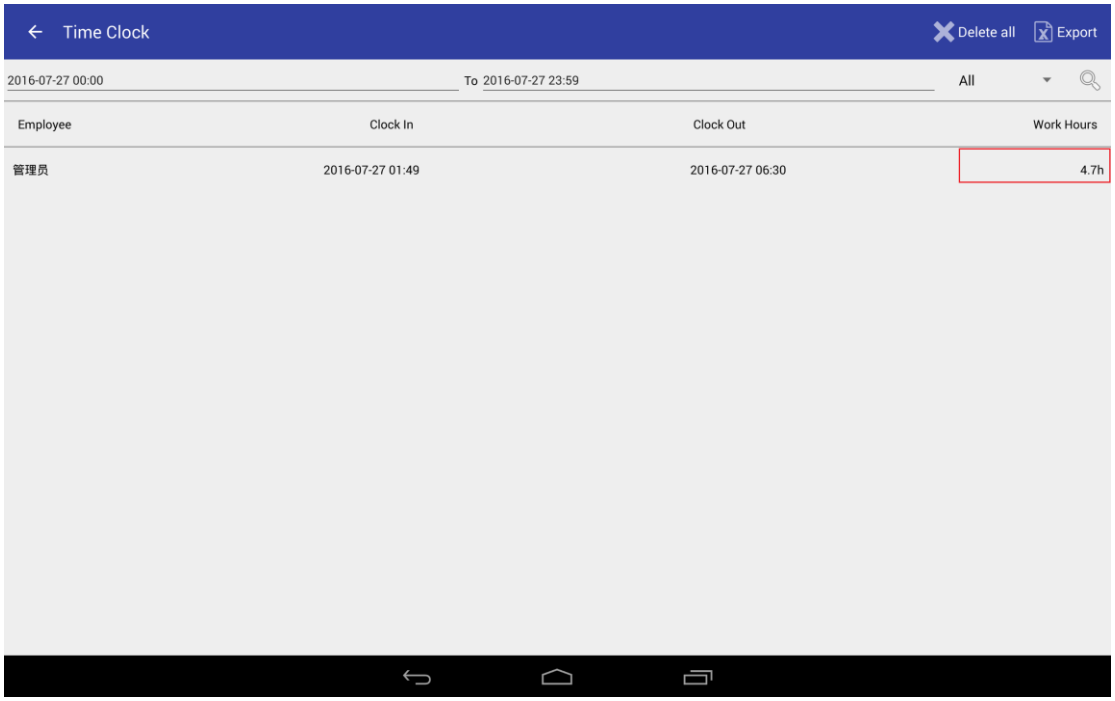
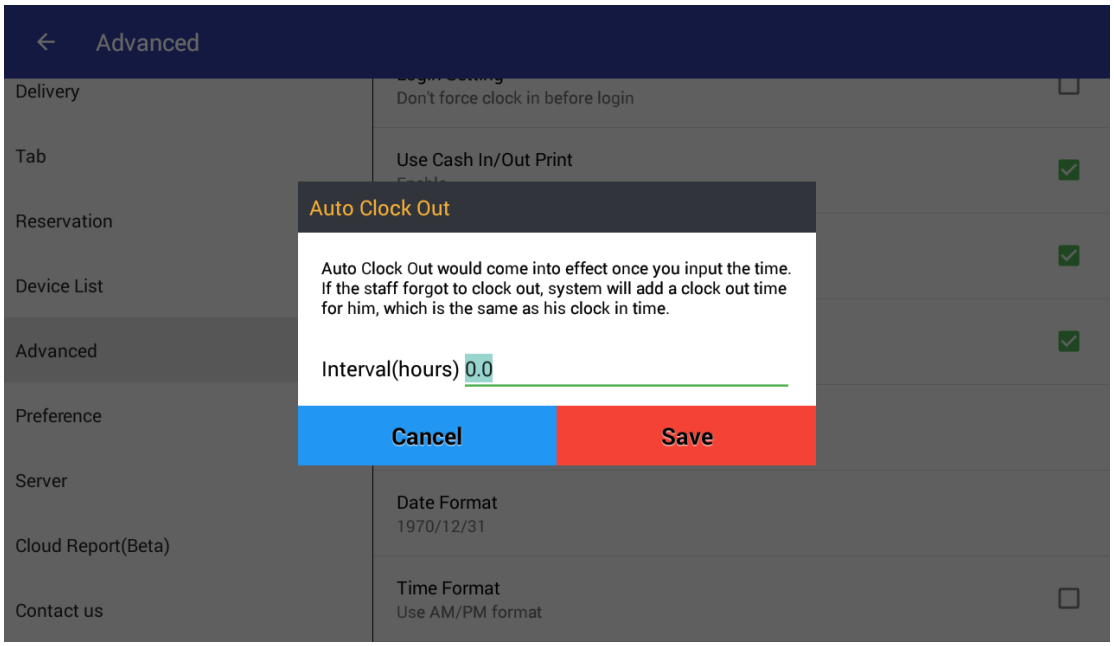
You can search Time Clock by date and employee. You can also update Time record when there is mistake.



The duration of work is from “clock in” to “clock out”.



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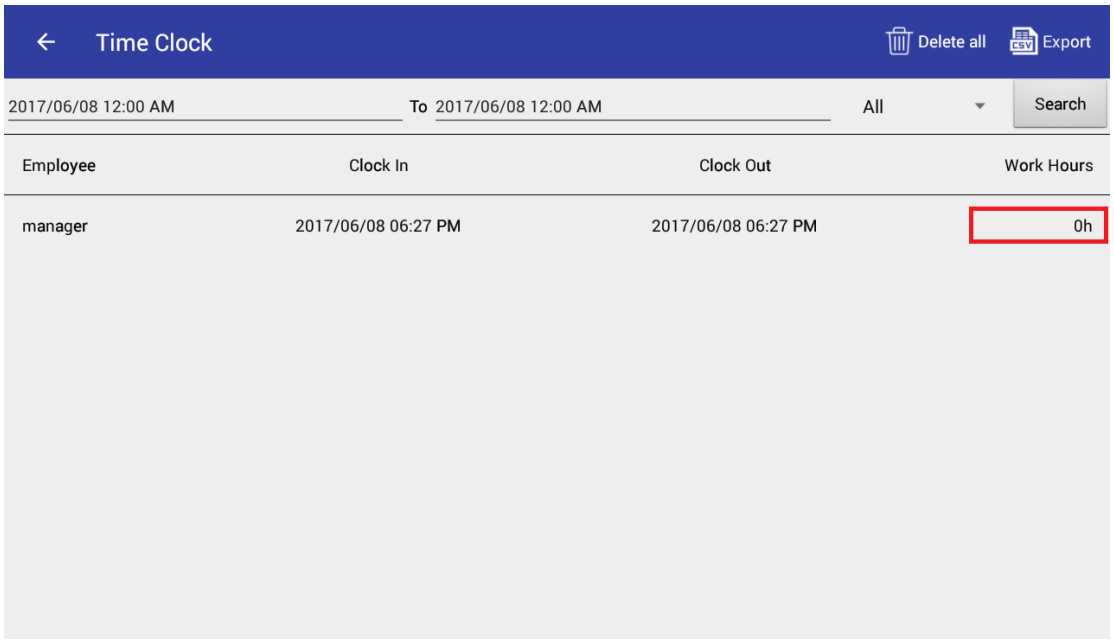
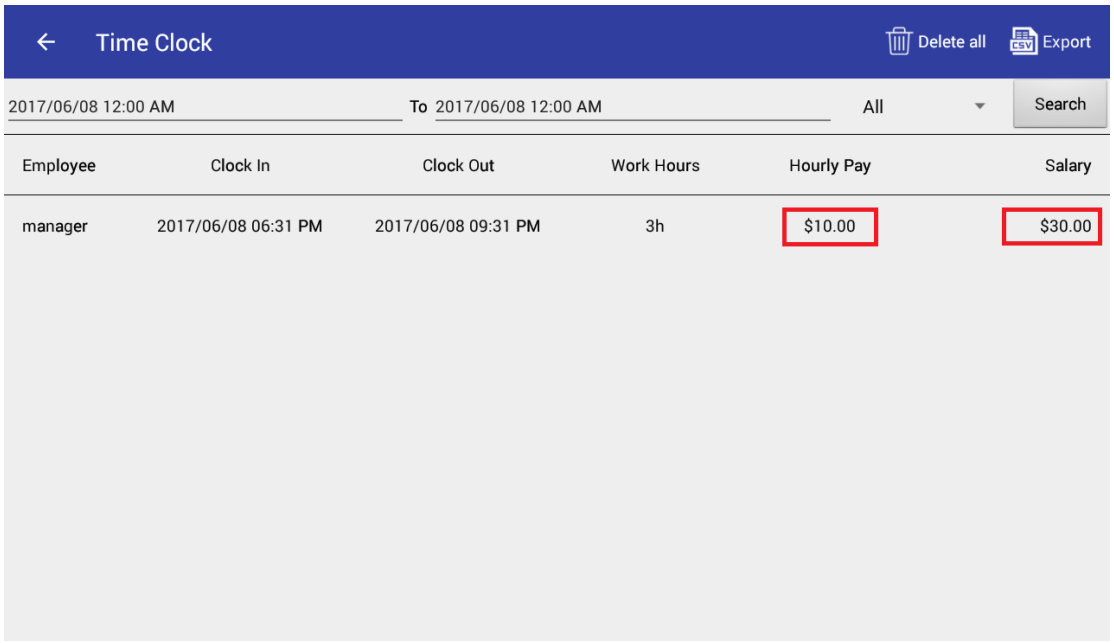


When you input number in Settings -> Advanced -> Others -> Auto Clock Out, it means you enable the auto clock out. Once a staff forgot to clock out, a record with 0 work hours will be created in the Time Clock screen. It is used to remind staff to clock out after the work.



If you enable the Use Staff Salary in Settings ->Advanced ->Others, and input the hourly pay in the Settings -> Restaurant -> Staff, you can see the salary of staff in the Time Clock screen. Salary = Work Hours * Hourly Pay

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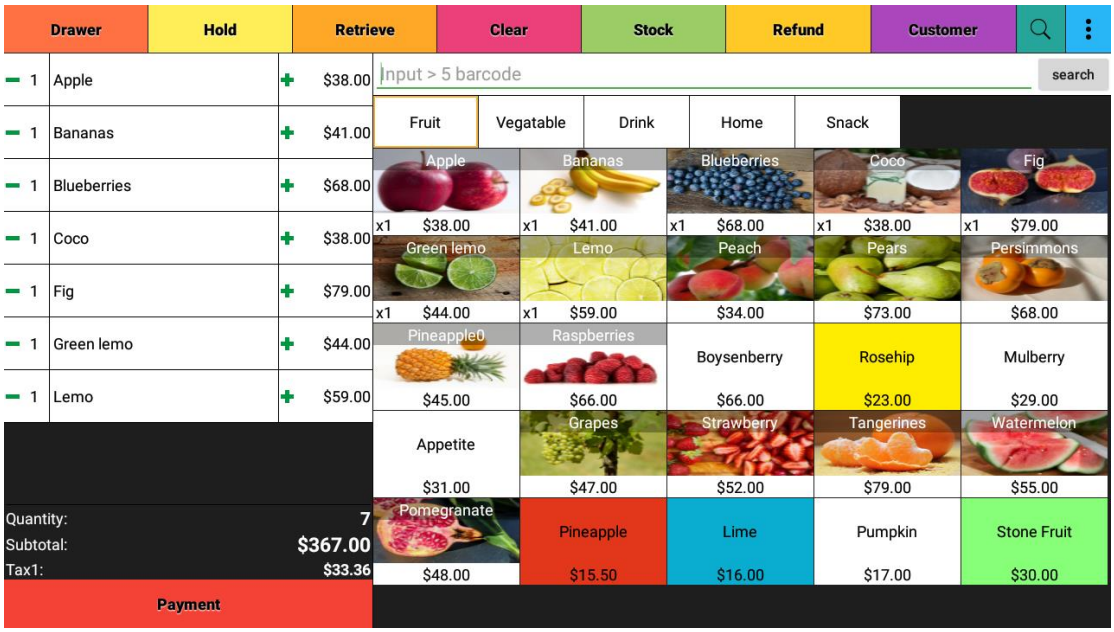
Chapter 5: Ordering

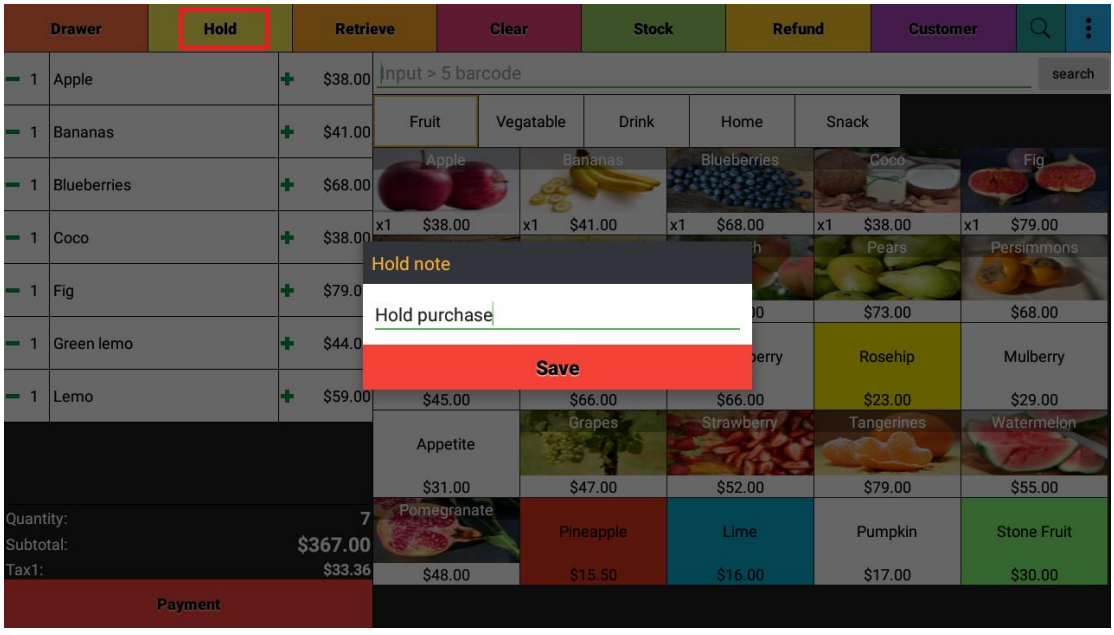
5.1 Order

5.1.1 Drawer



You can open Cash Drawer by Tag Drawer

5.1.2 Hold



You can hold ordering items, and retrieve back the order.

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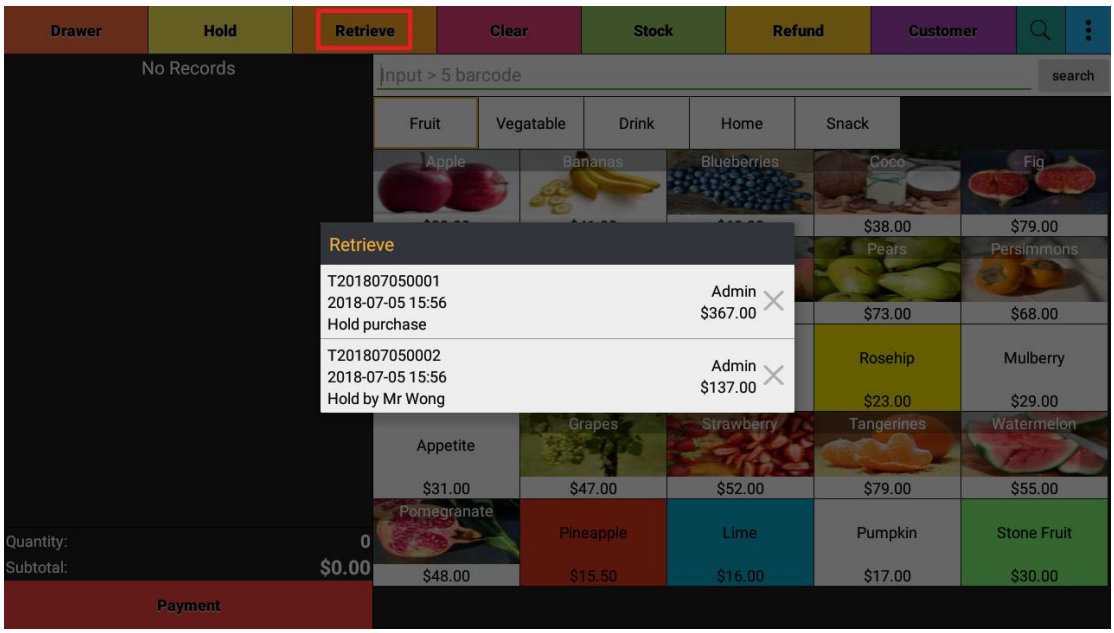
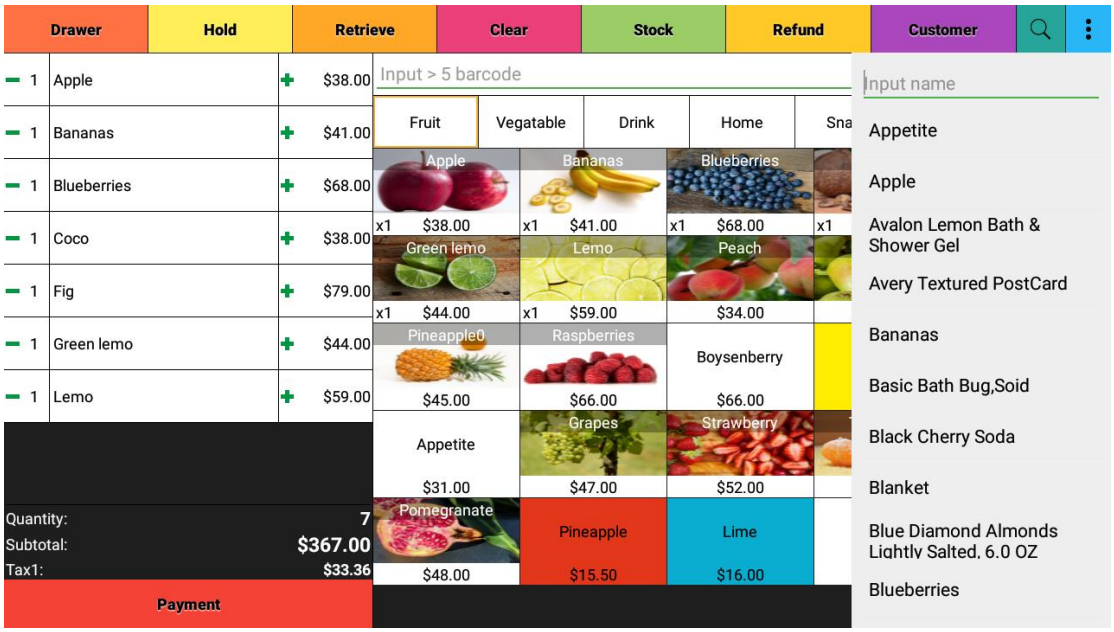
5.1.3 Retrieve



You can retrieve the holding Items from the list.

5.1.4 Search



You can search Item by input name, so it is very easy to find item.

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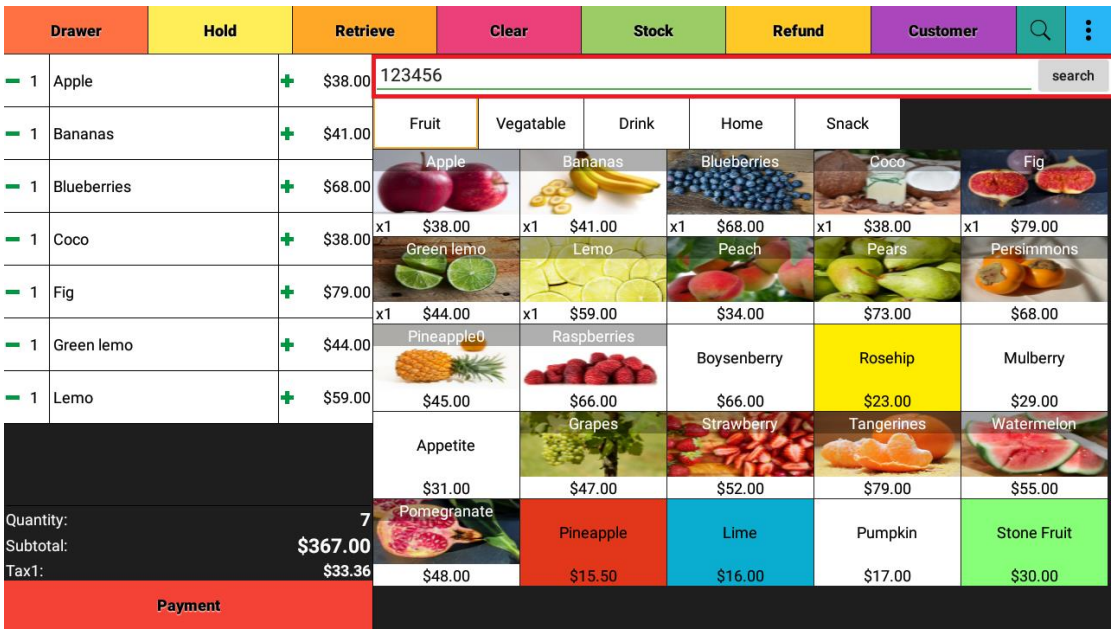
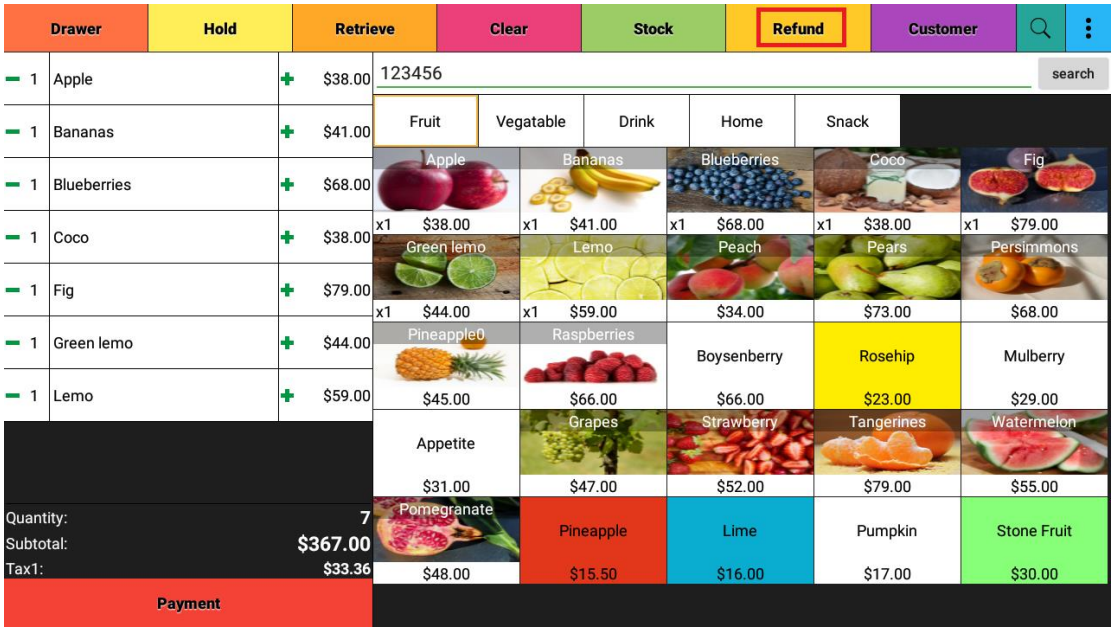
5.1.5 Scanner



You can use Barcode Scanner or Phone to scan barcode of product, then the item will auto add to the order. It is very convenient and quick to take order.

5.1.6 Refund



You can directly tag Refund to refund item when customer request.

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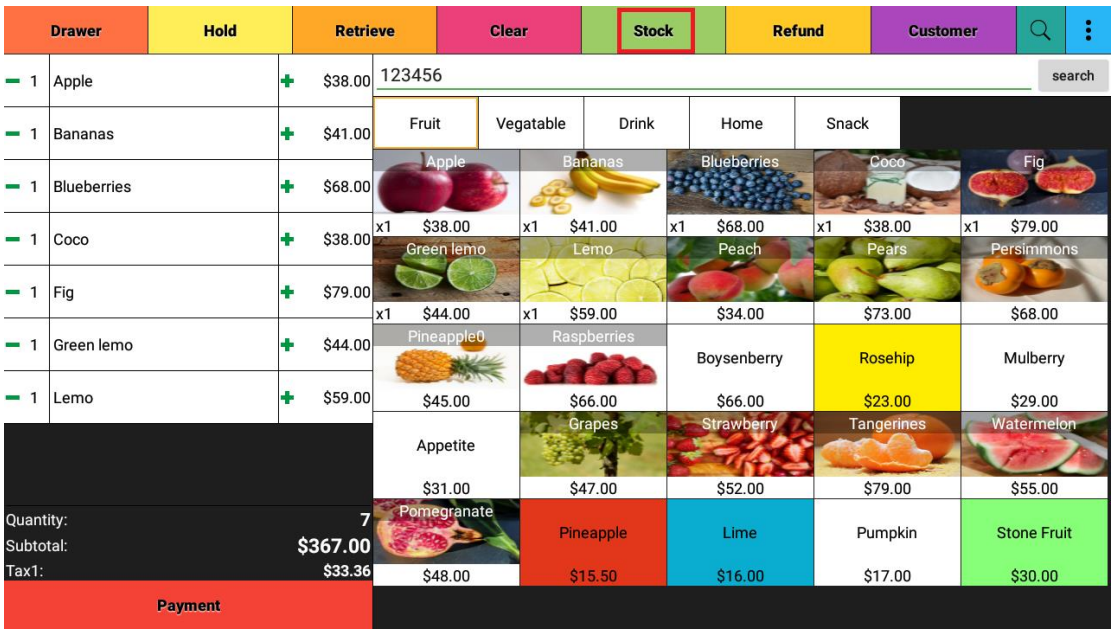
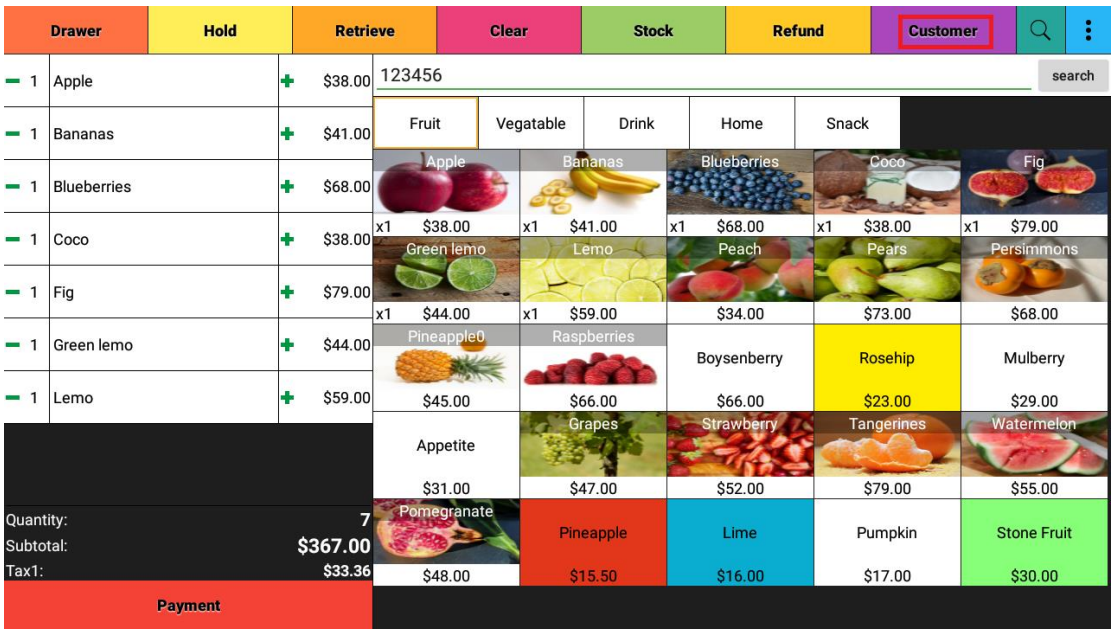
5.1.7 Check Stock



You can use Barcode Scanner or phone camera to find the item and its quantity.

5.1.8 Customer Sale



You can choose Customer by phone number or name, so we have sales record for the customer.

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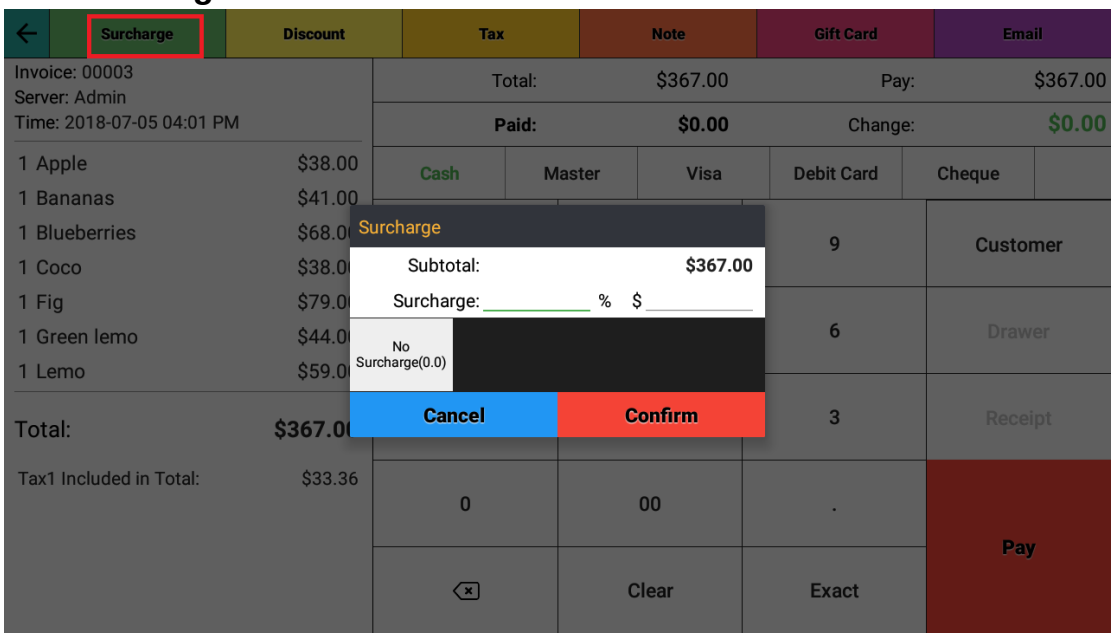
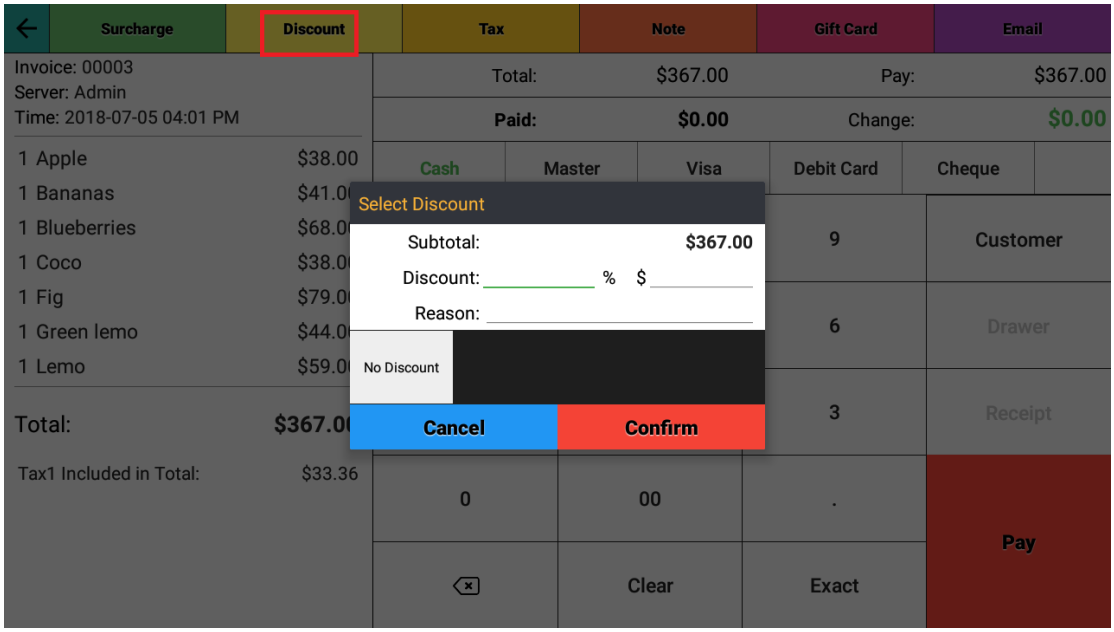
Chapter 6: Payment

6.1 Surcharge



You can apply Surcharge to the Order.

6.2 Discount



You can apply Discount to the Order.

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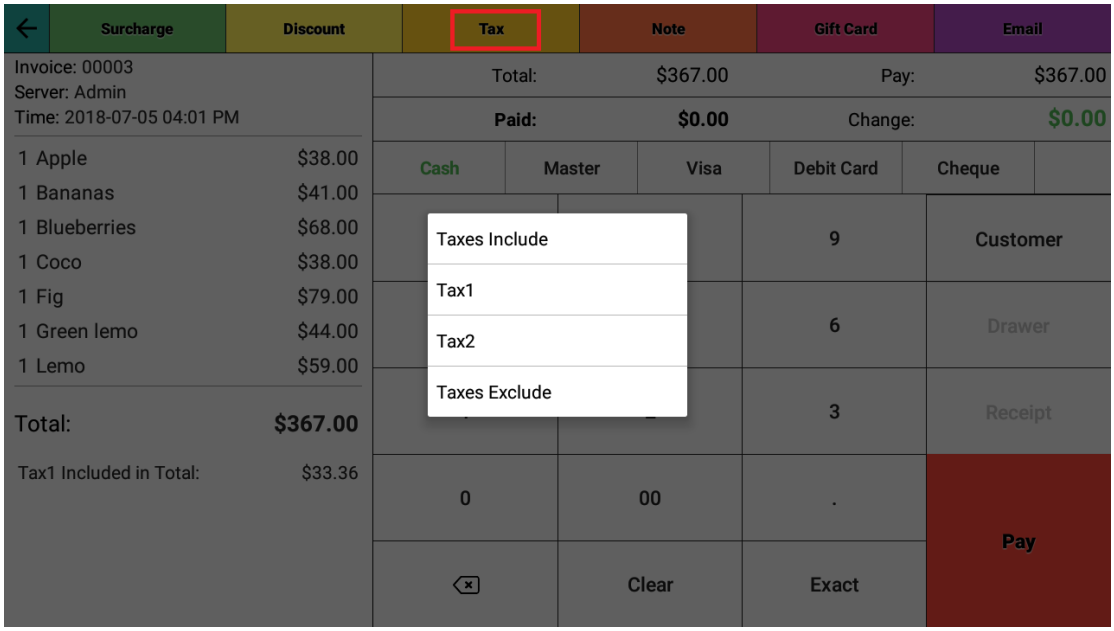
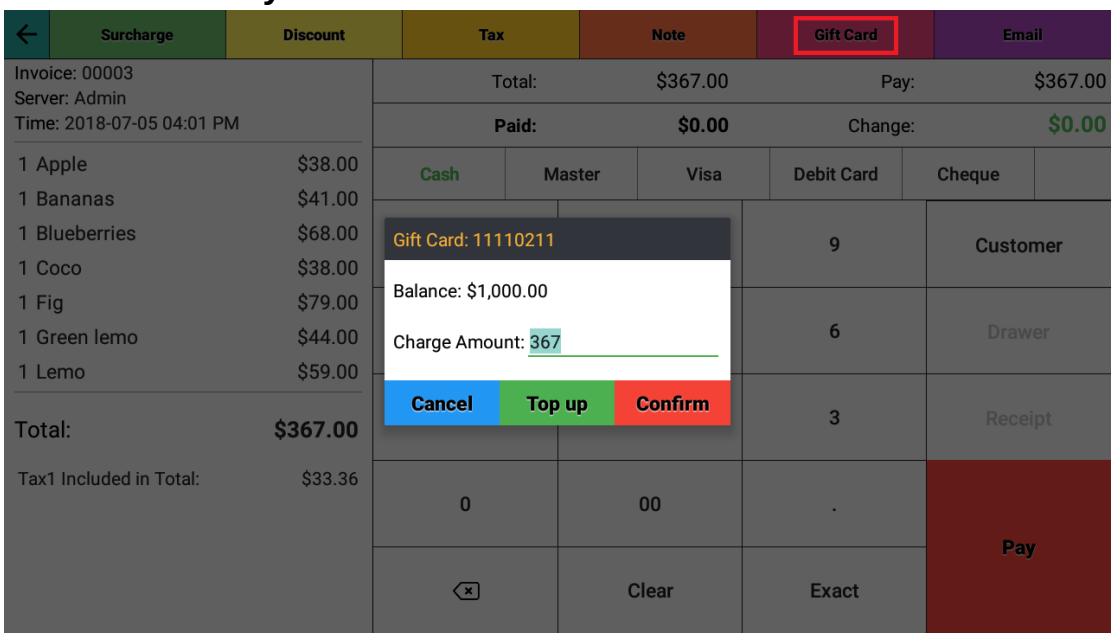
6.3 Tax



You can exclude Tax or include Tax.

6.4 Gift Card Payment



You can choose Gift Card payment for the order.

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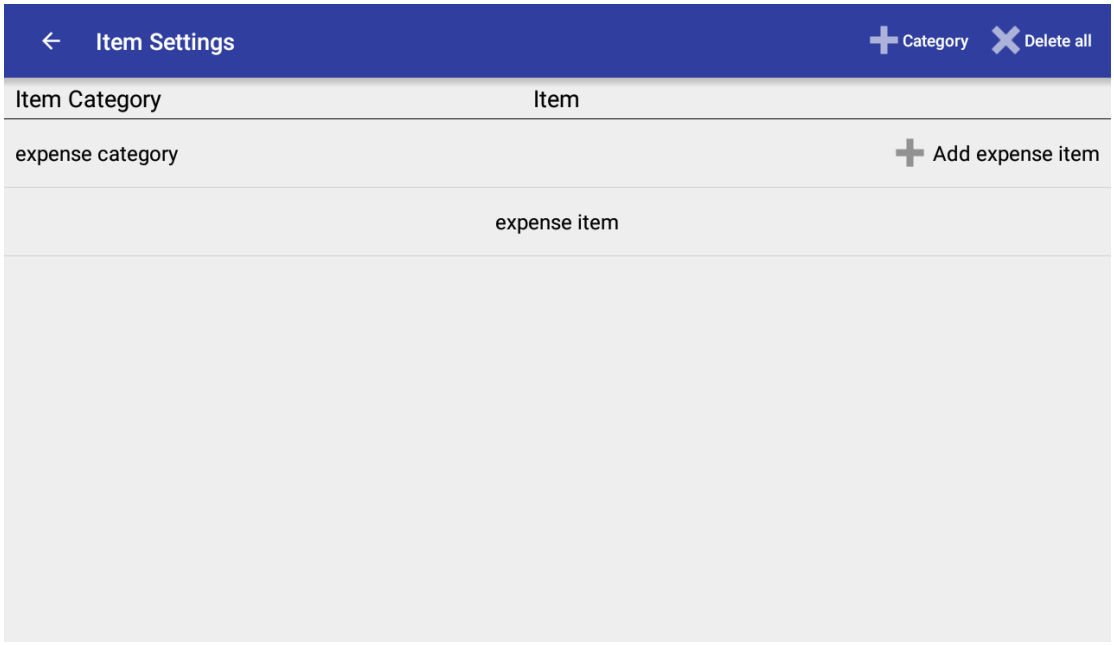
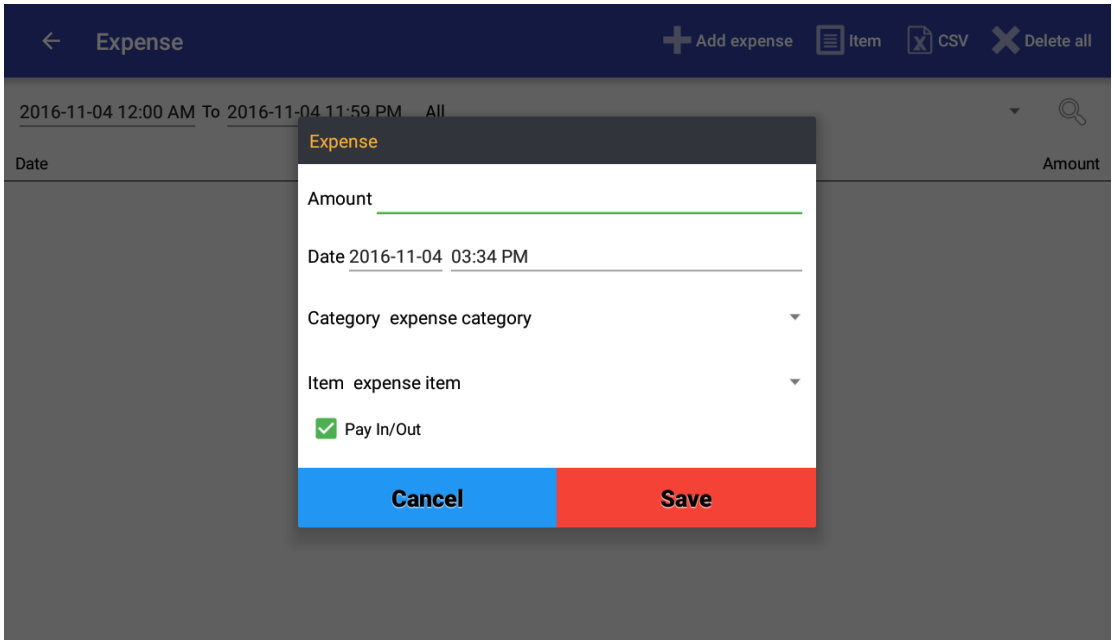
Chapter 7: Other Functions

7.1 Expense



First, you should set up the Item, add category and add expense item.



Then you could add expense. Specially, when you check the pay in/out, this expense will be recorded in pay in/out.

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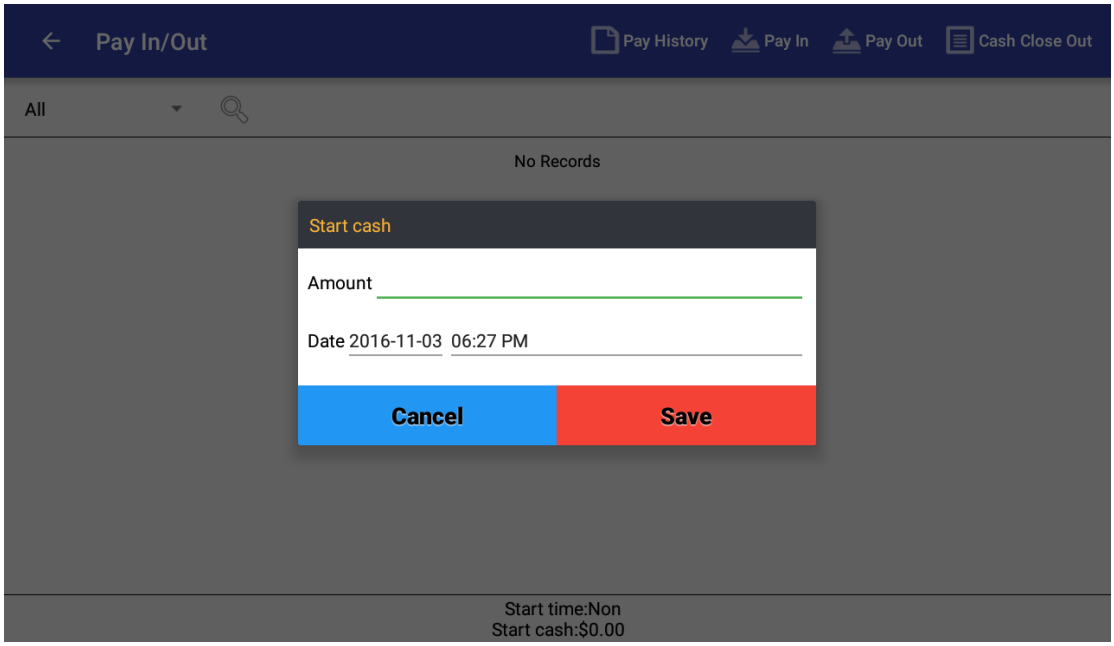
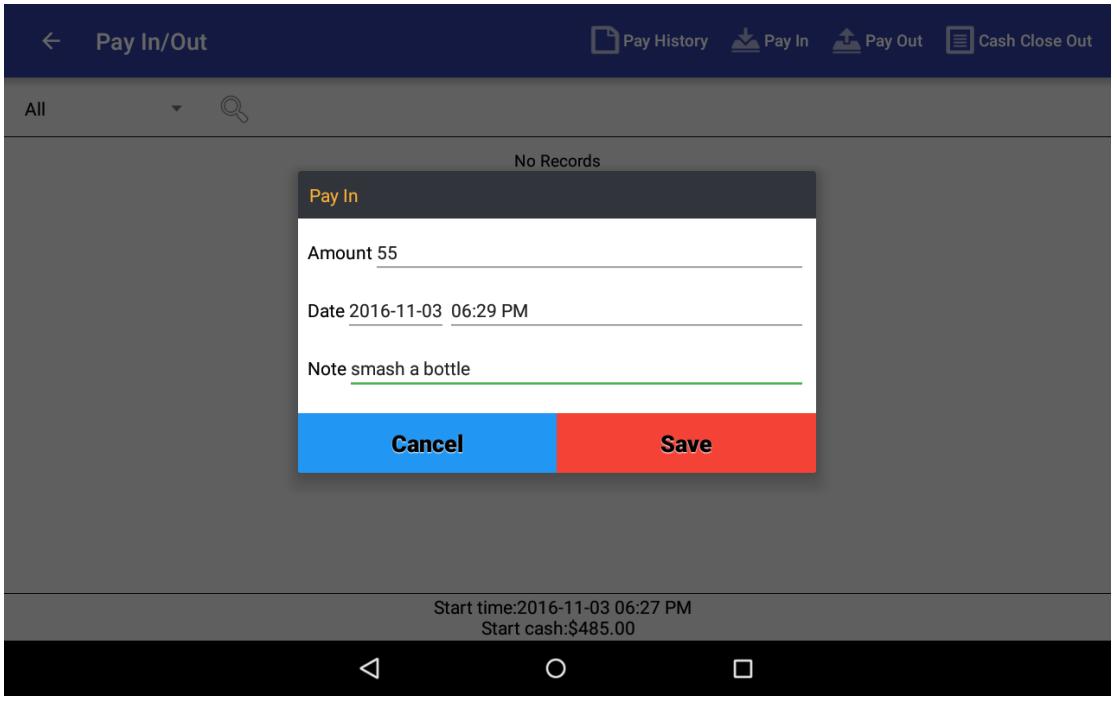
7.2 Pay In/Out



First, you should check the total amount of your cash in the register, and input it as your start cash.



Then, when cash transaction occurs, you should tap pay in or pay out to record your operation.

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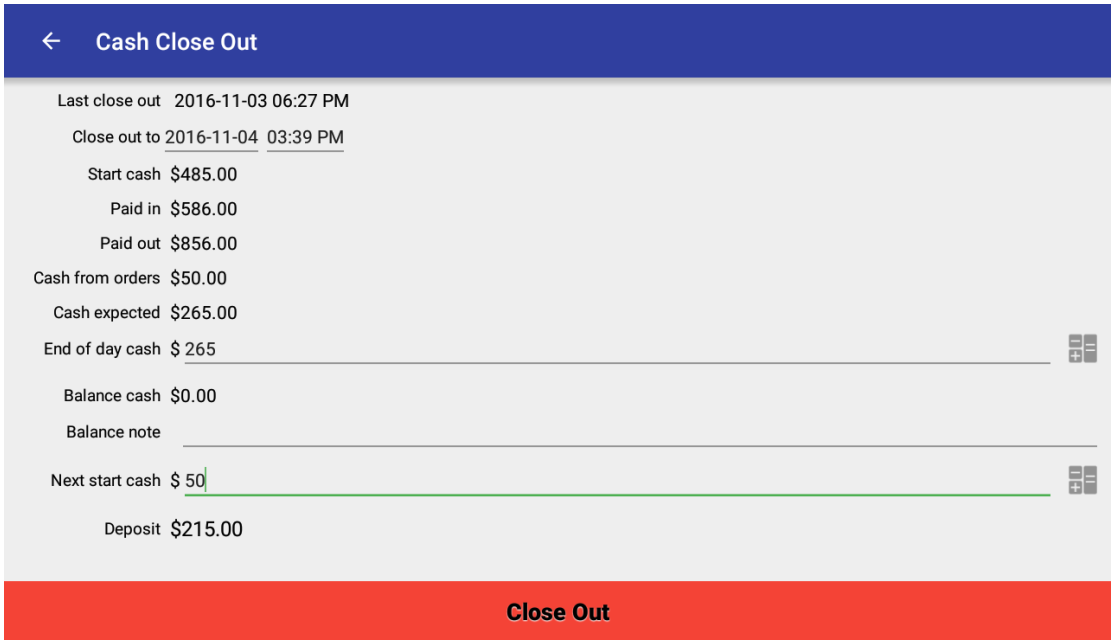
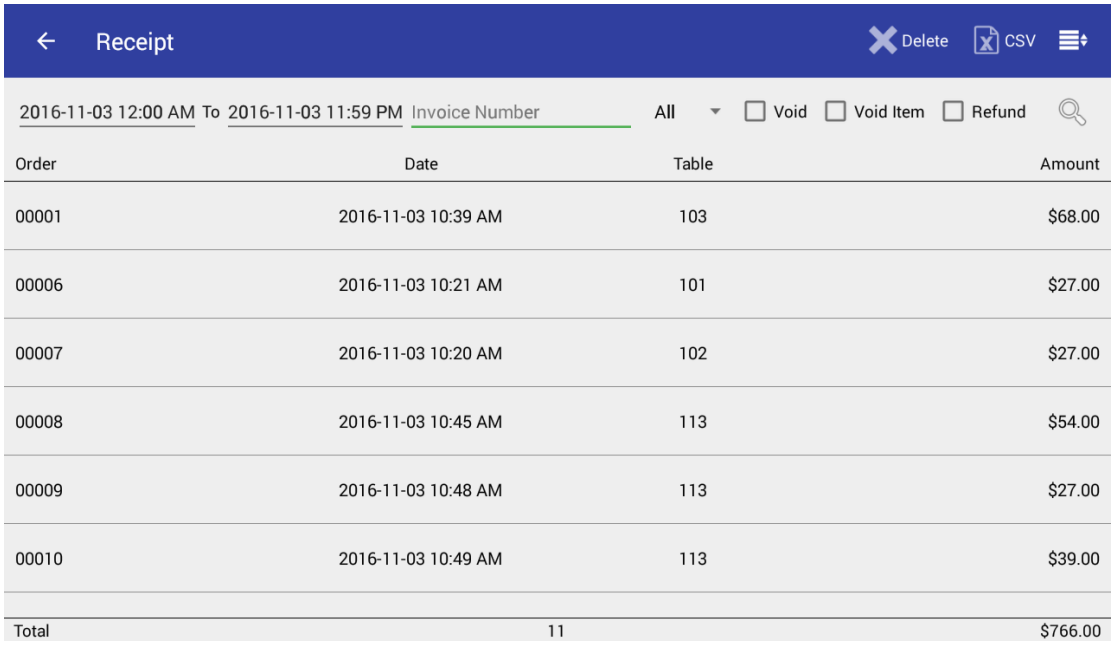


When tapping the Cash Close Out button, the POS will show the transactions of cash today.

7.3 Receipt



You can view the orders, which have been paid, voided or refunded in here.

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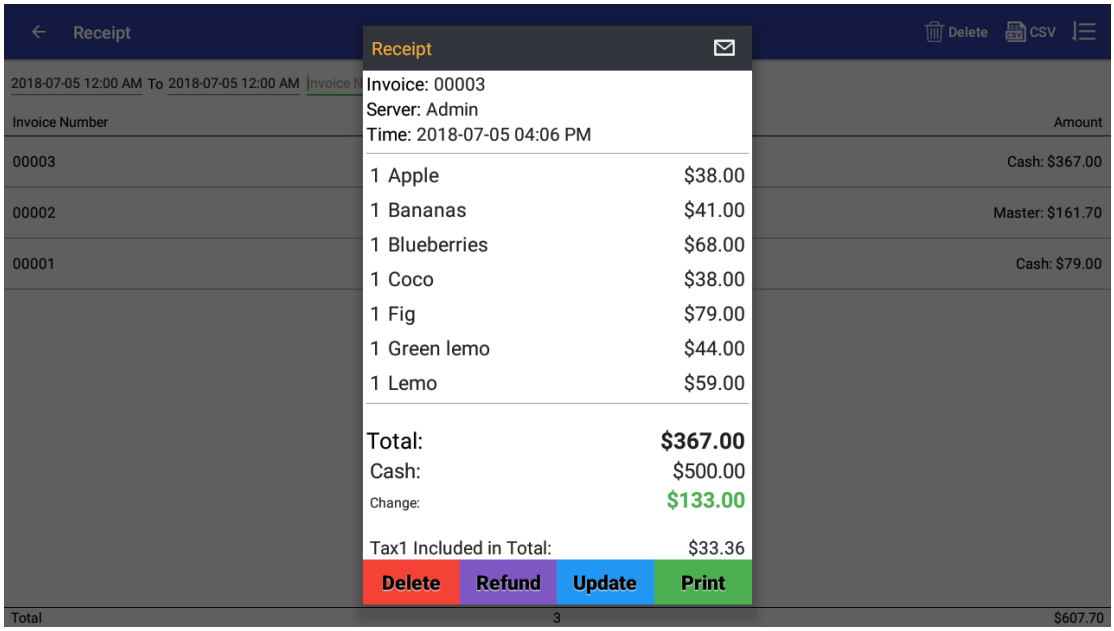
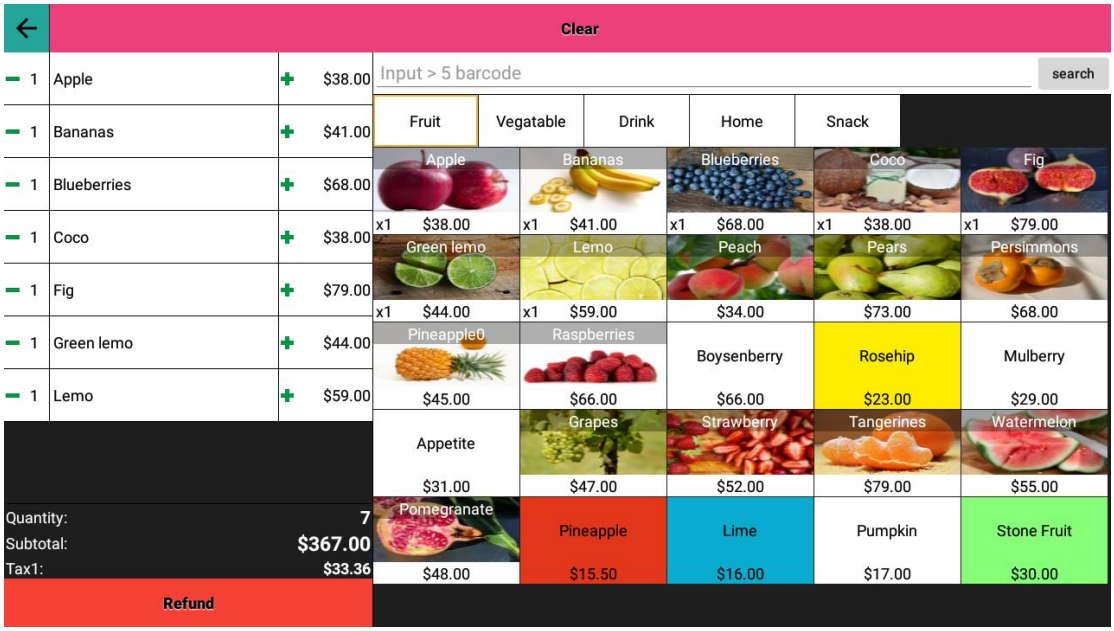


By tapping the order, you can delete, refund, update, print the order and send the receipt to the customer.



When refunding an order, you can select which item you want to refund, and edit its price.

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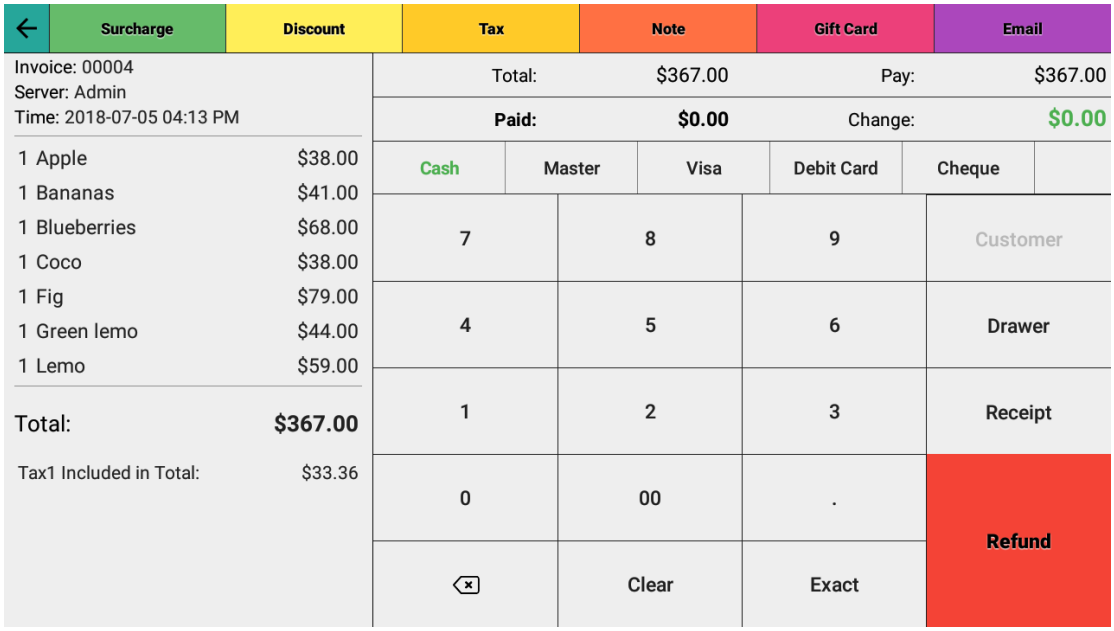
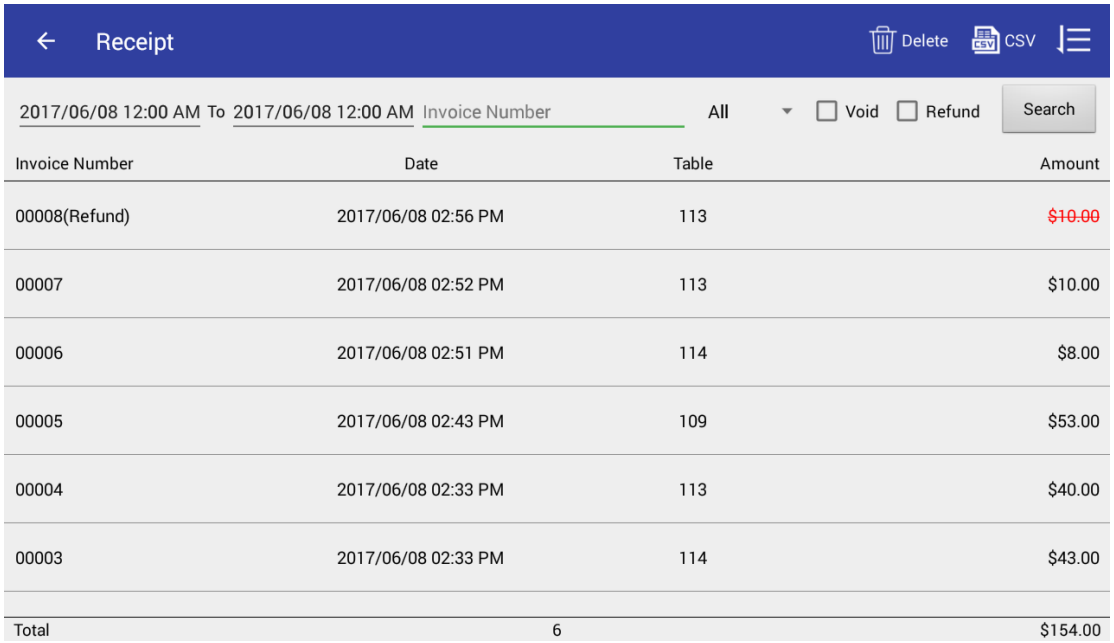


After selecting item, you can choose the refund method.



Once you finish the refund process, a new refund order will show up in the receipt screen.

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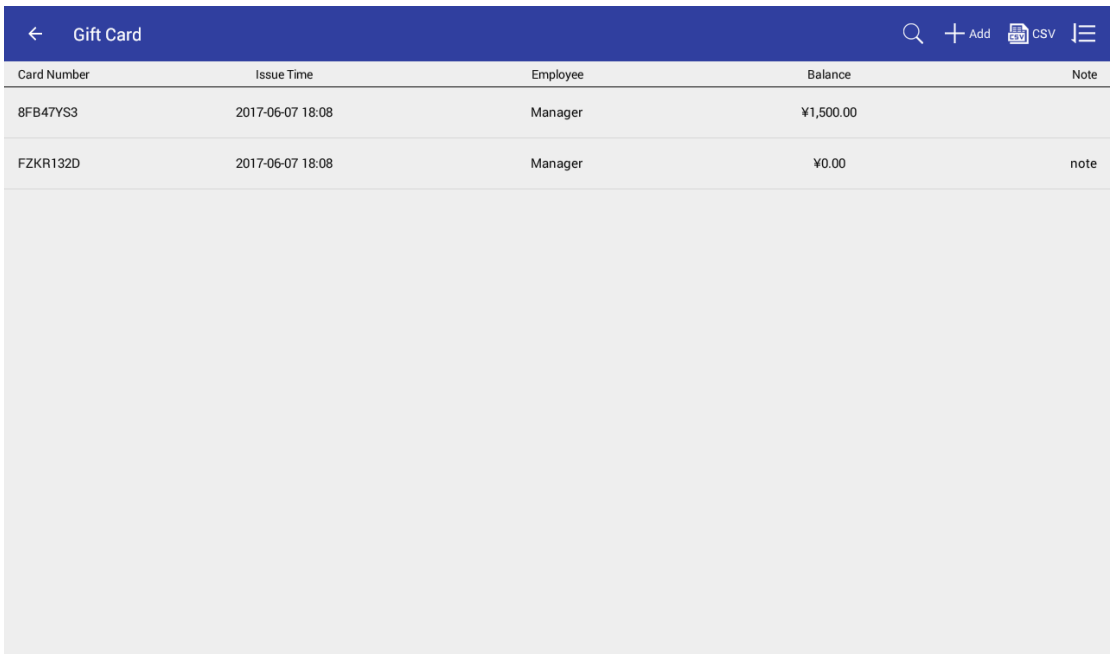
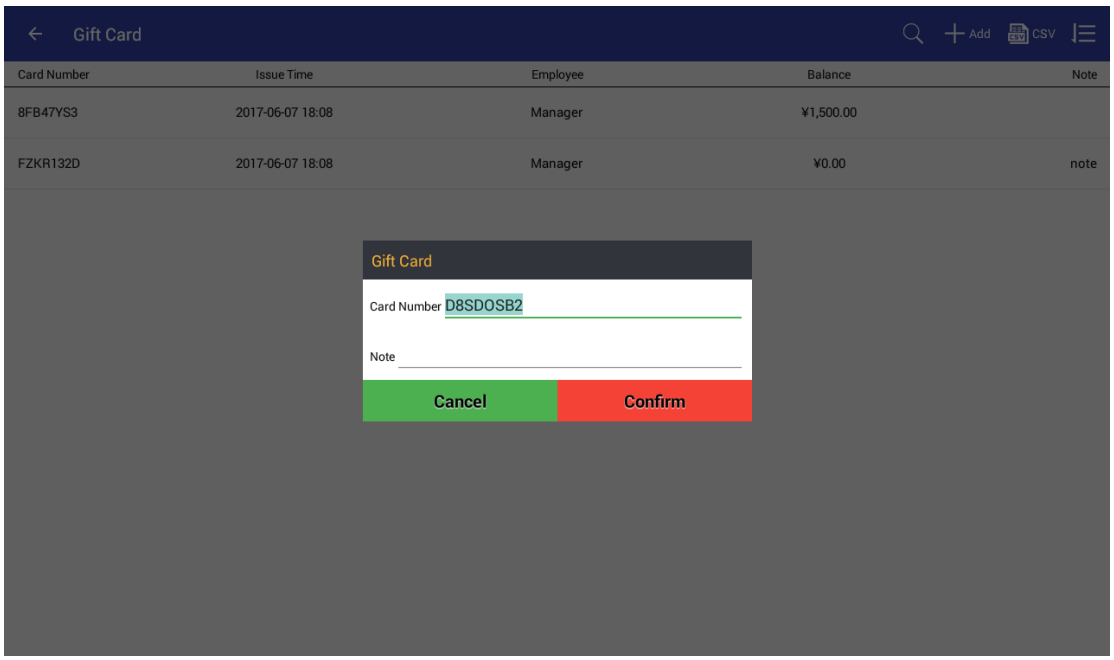
7.4 Gift Card



You can view and manage the gift card that has been created in this screen.



When you add a new gift card, the system will create a random card number for you. You can input the card number you want as well.

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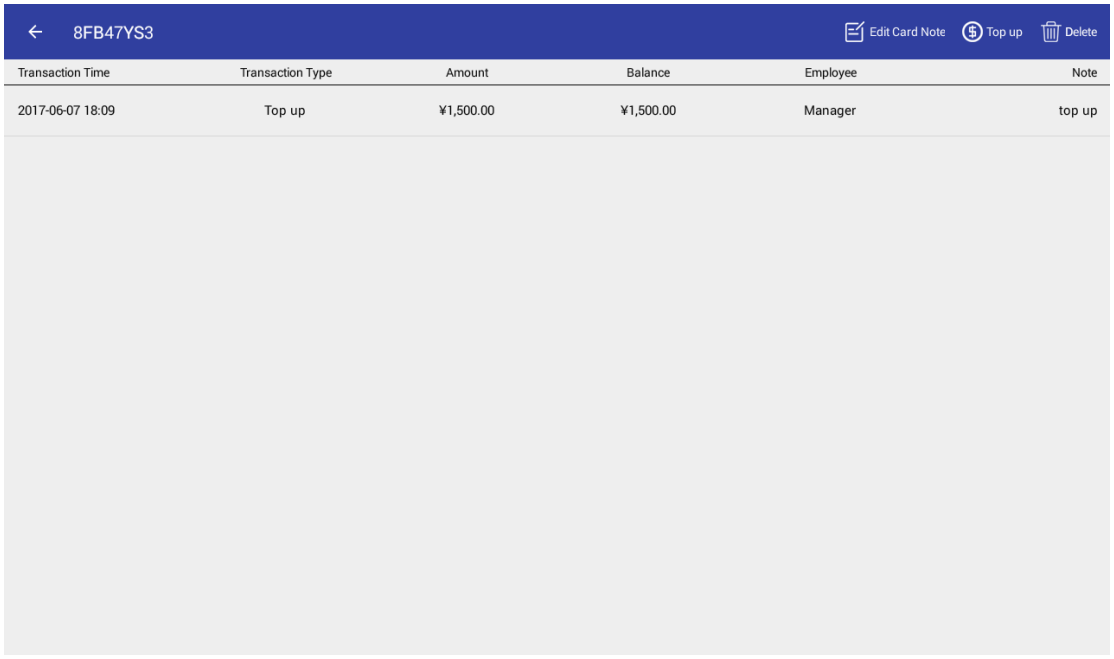
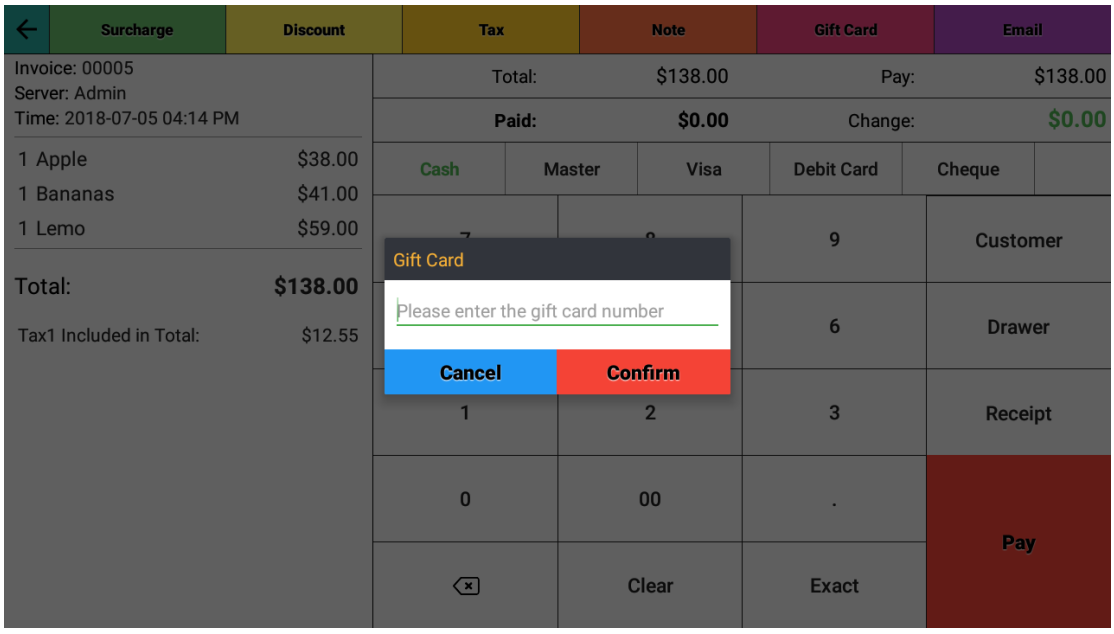


Click on the gift card, you can go into the screen where you can manage the gift card.



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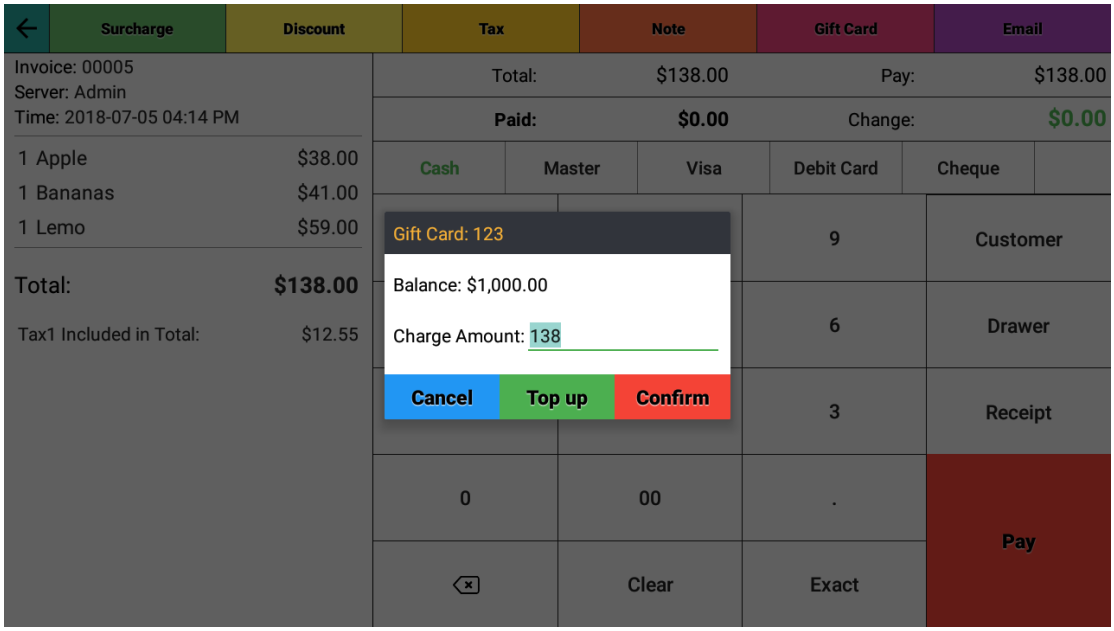

In the payment screen, you can input the gift card number to pay the order. If the card number you input does not exist, system will create a new gift card with this card number. Once the deposit of this card is insufficient, you can top up this card.

7.5 Company Report

You can see the statistics of your restaurant in the period you select. Also, you can print and export the report in this screen.

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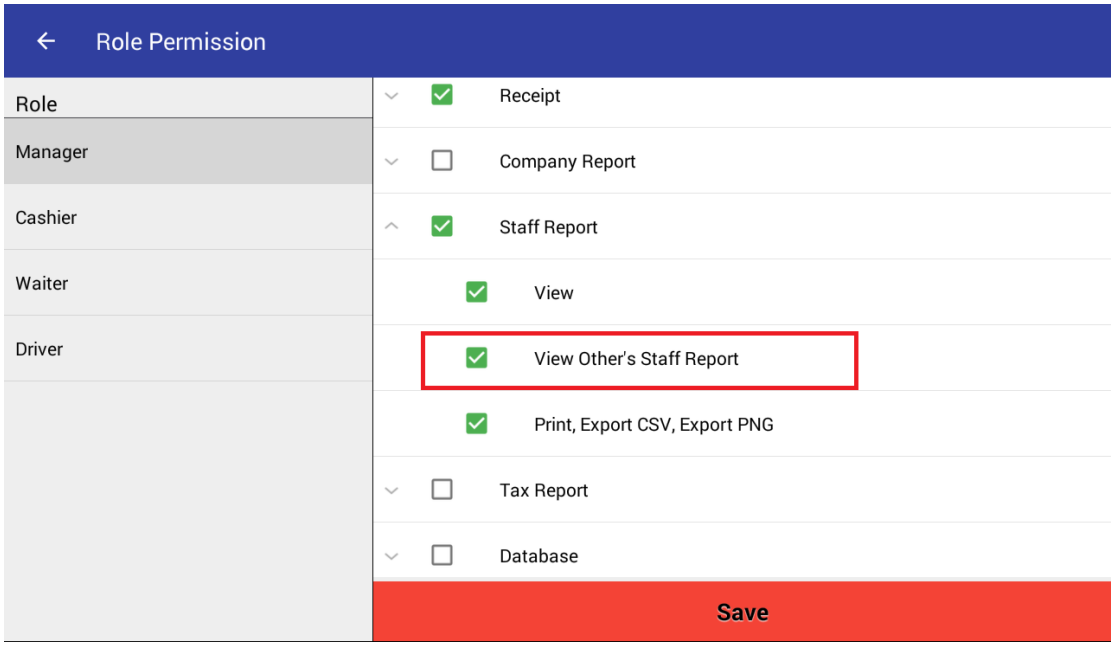
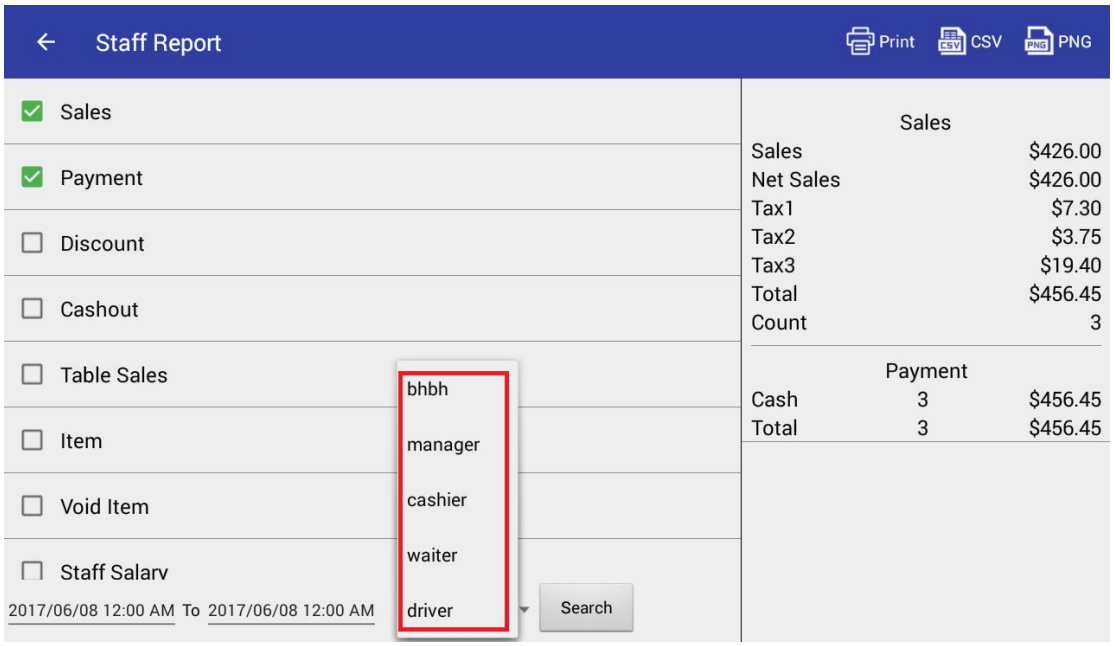
7.6 Staff Report





Every staff can see the staff report, which only shows his own statistics. Only when you have the permission called View Other's Staff report, can drop down list show up in your staff report, which is used to view other's report.

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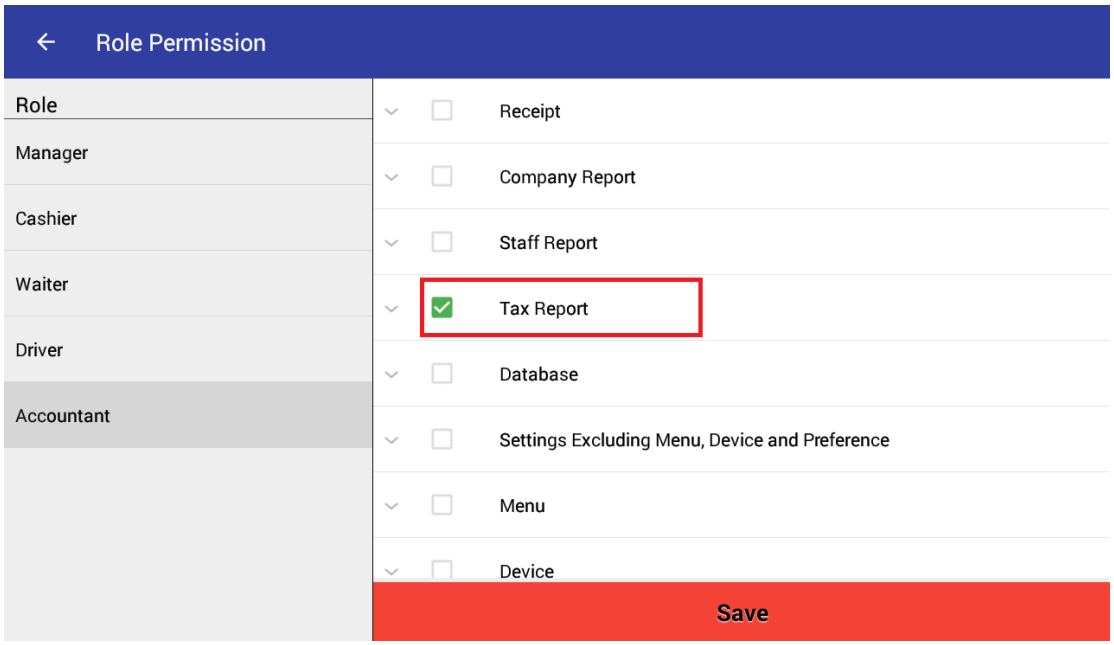
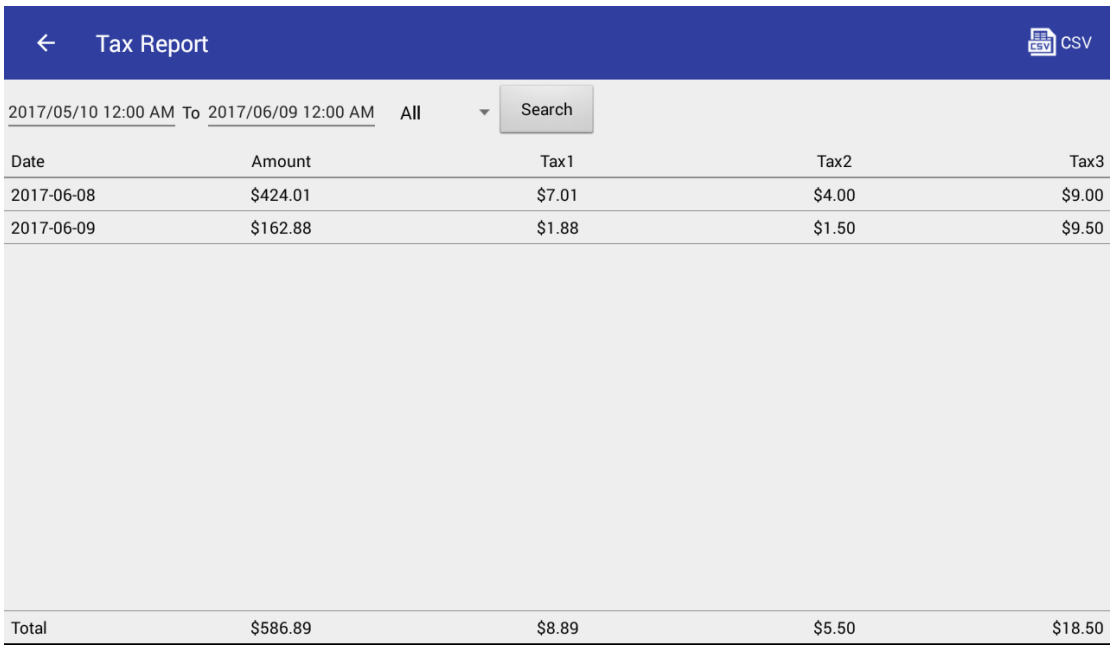
7.7 Tax Report



To see the tax report, you should create a new staff owning the Tax Report permission, then log in this staff. The staff owning the Tax Report permission can see nothing but only the tax report.



Date	Amount	Tax1	Tax2	Tax3
2017-06-08	$424.01	$7.01	$4.00	$9.00
2017-06-09	$162.88	$1.88	$1.50	$9.50
Total	$586.89	$8.89	$5.50	$18.50

In the Tax Report scree, you can see the sum of tax amount of your restaurant every day. You can export this report in this screen.

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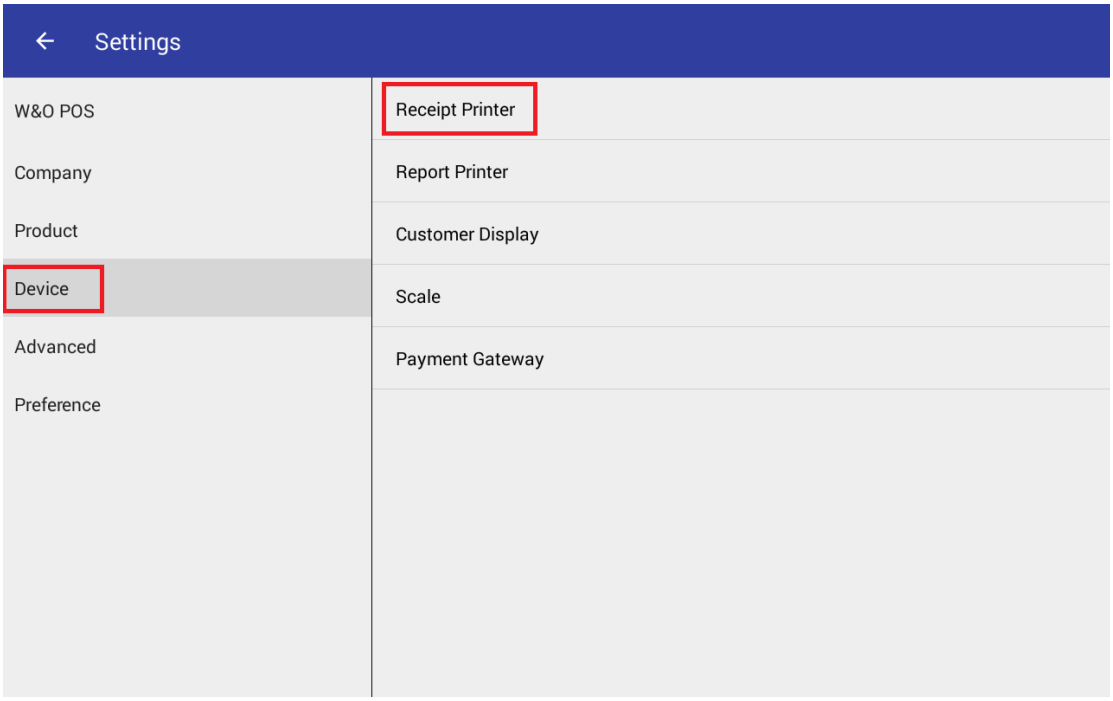
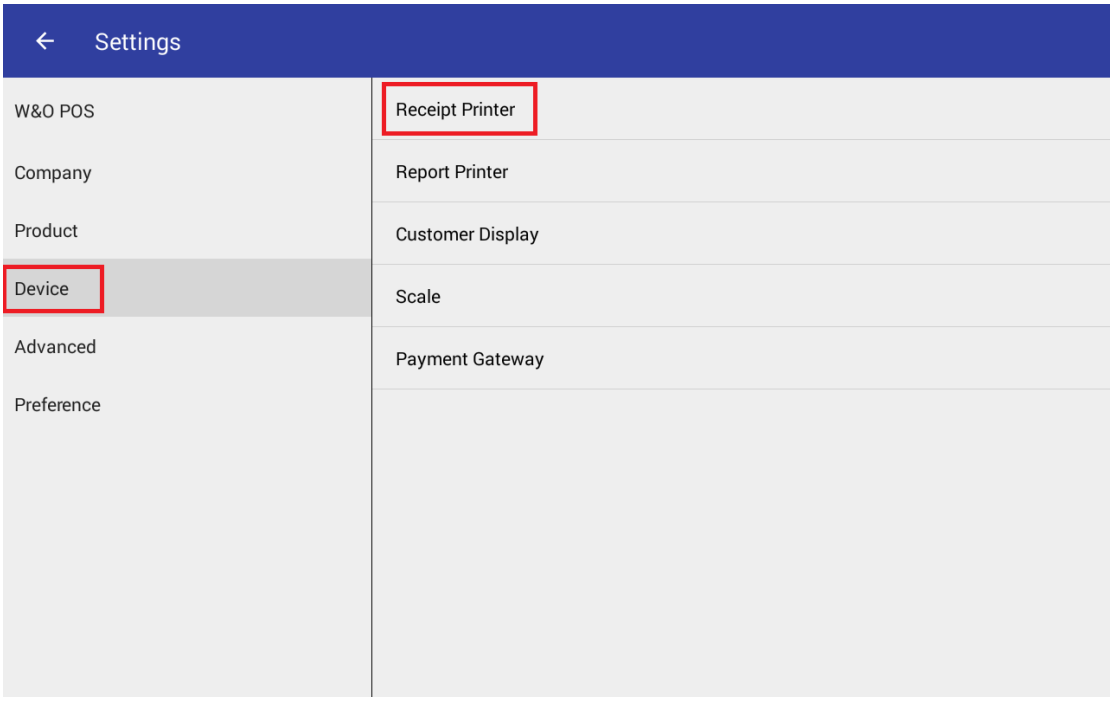
Chapter 8: Setting up Your Receipt Printer

From the Menu, go to Settings > Device > Receipt Printer.



Tap Printer Setting to setup printer.



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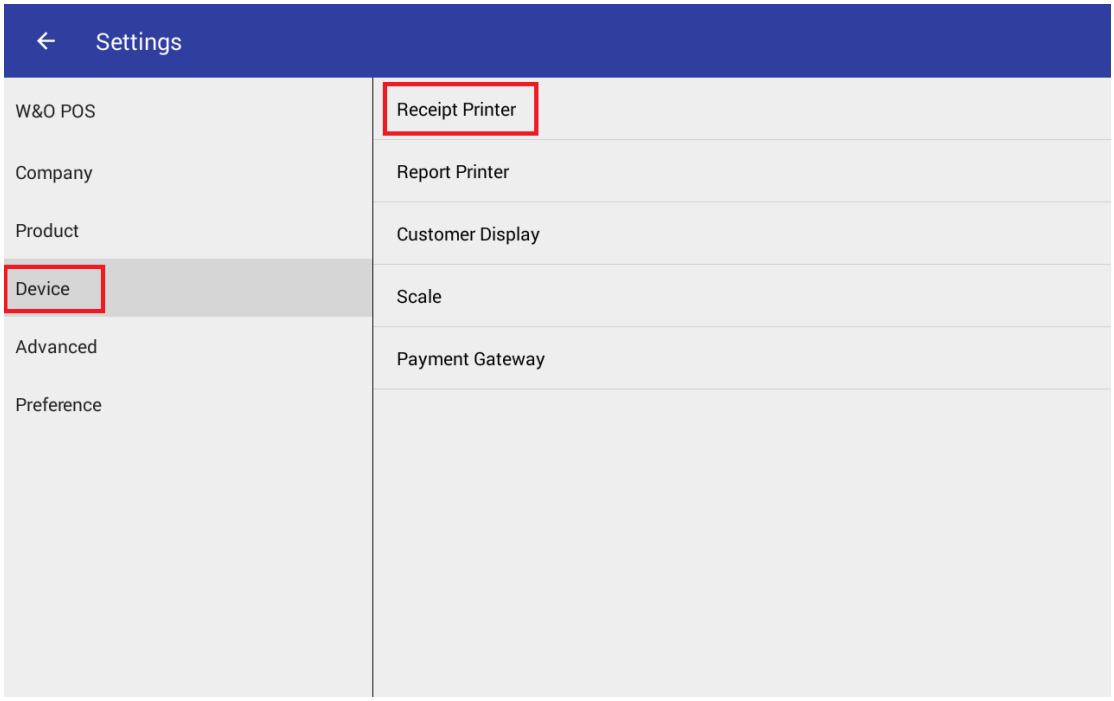
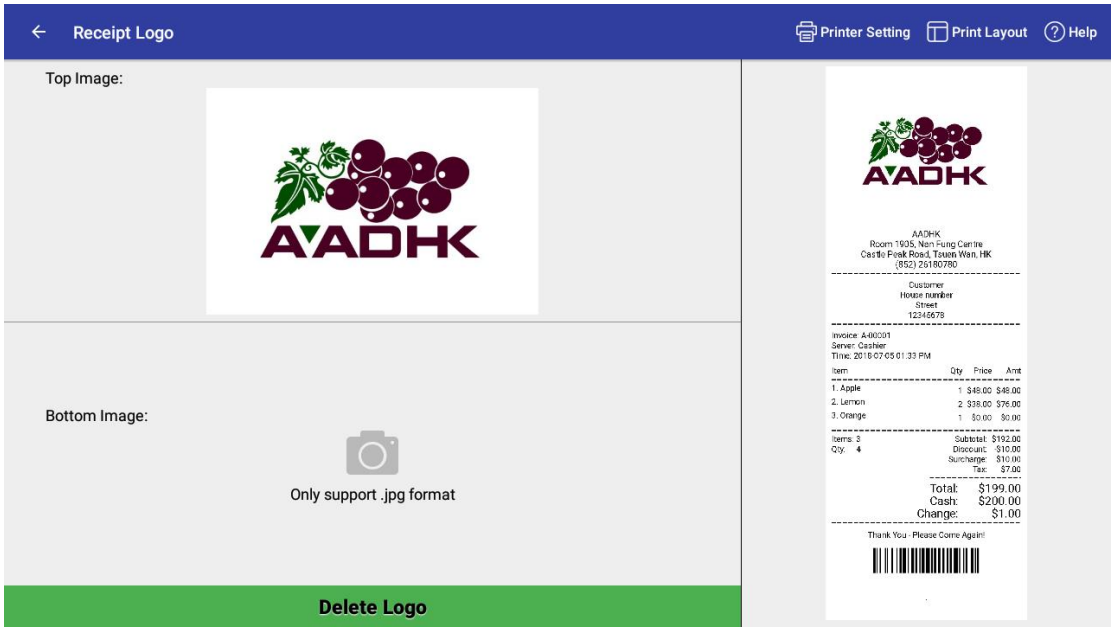
Tap Print Layout to setup layout.



Tap Receipt Logo to setup logo.



Cash in/out record printing and expense record printing have been added in our POS.

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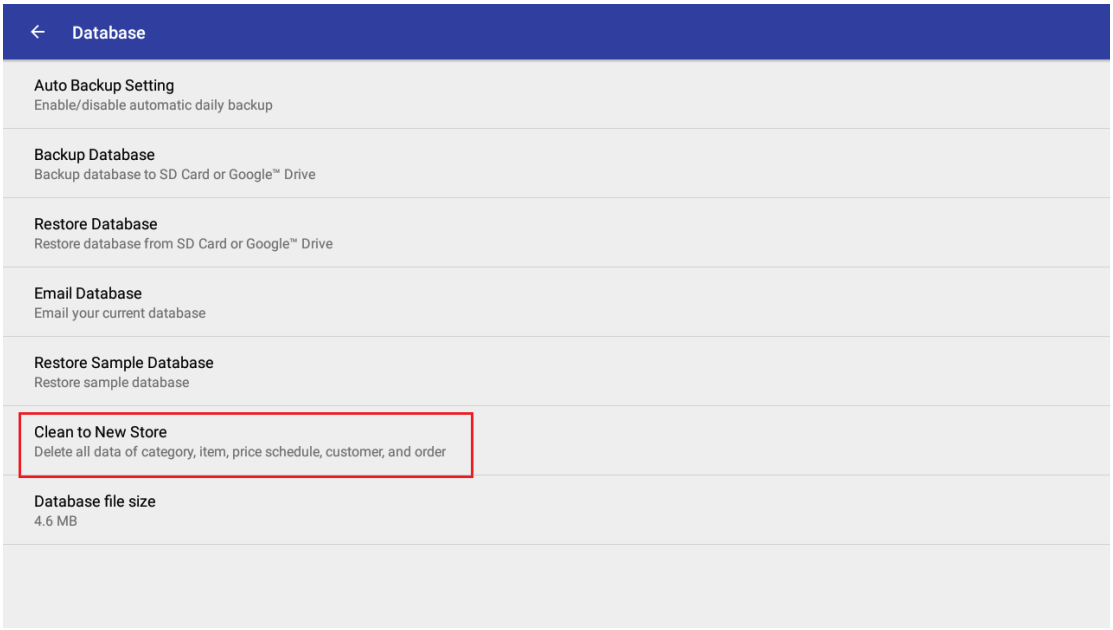
Chapter 9: How to Setup New Store

9.1 Cleaning demo data



First you need to clean demo data (orders, menu…) by tag Database>Clean to New Restaurant

9.2 Setting up Store

You can reference to Chapter 1: Store Settings

9.3 Setting up Product

You can reference to Chapter 2: Setting up Your Product

9.4 Setting up Employee

You can reference to Chapter 3: Manage Employee

9.5 Setting up Receipt Printer

You can reference to Chapter 4: Setting up Your Receipt Printer

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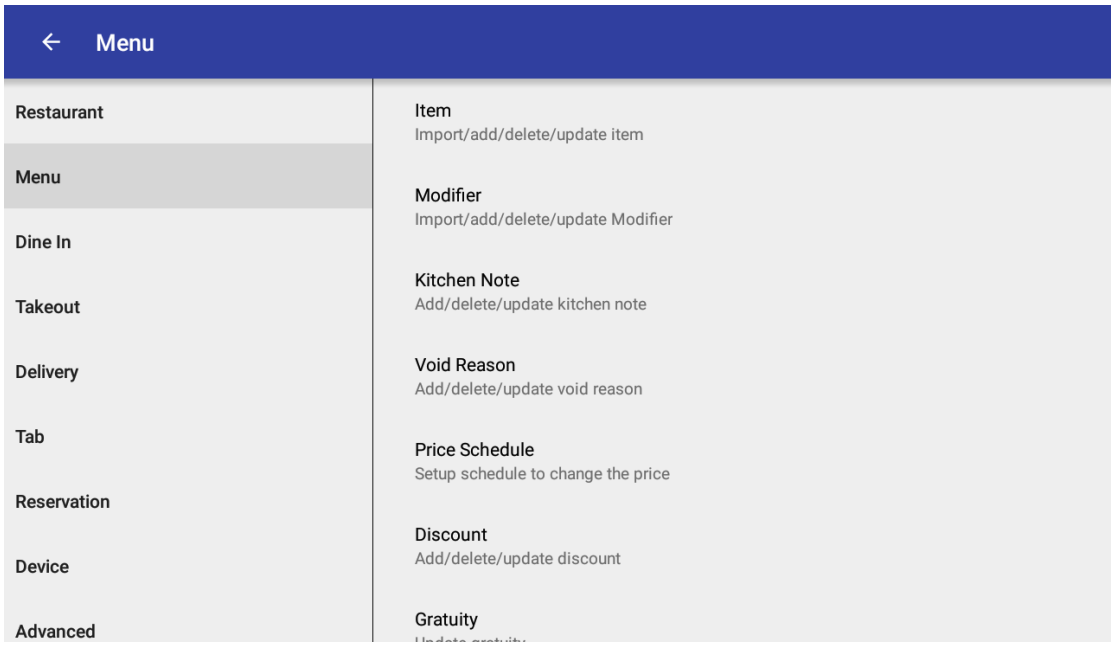
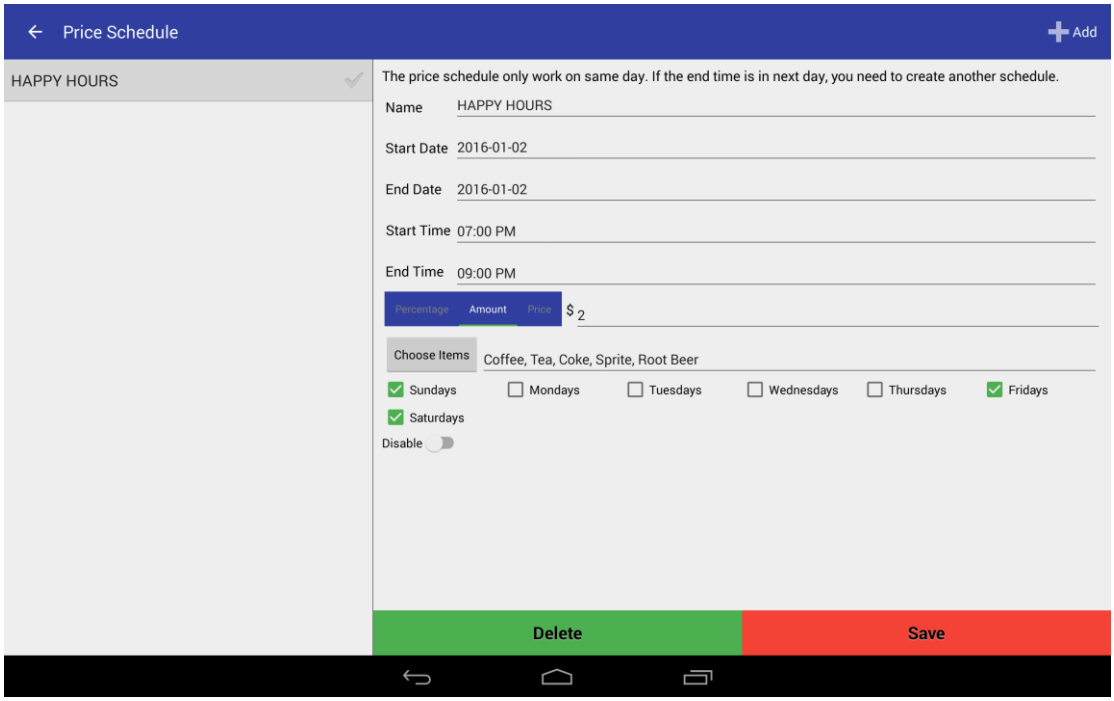
Chapter 10: How to Use Price Schedule

You may adjust price of item on different date and time. You can setup Price Schedule auto adjust price for you.

From the Table Screen Menu, go to Settings>Menu>Price Schedule.



Tap the Add icon to add a new Price Schedule.



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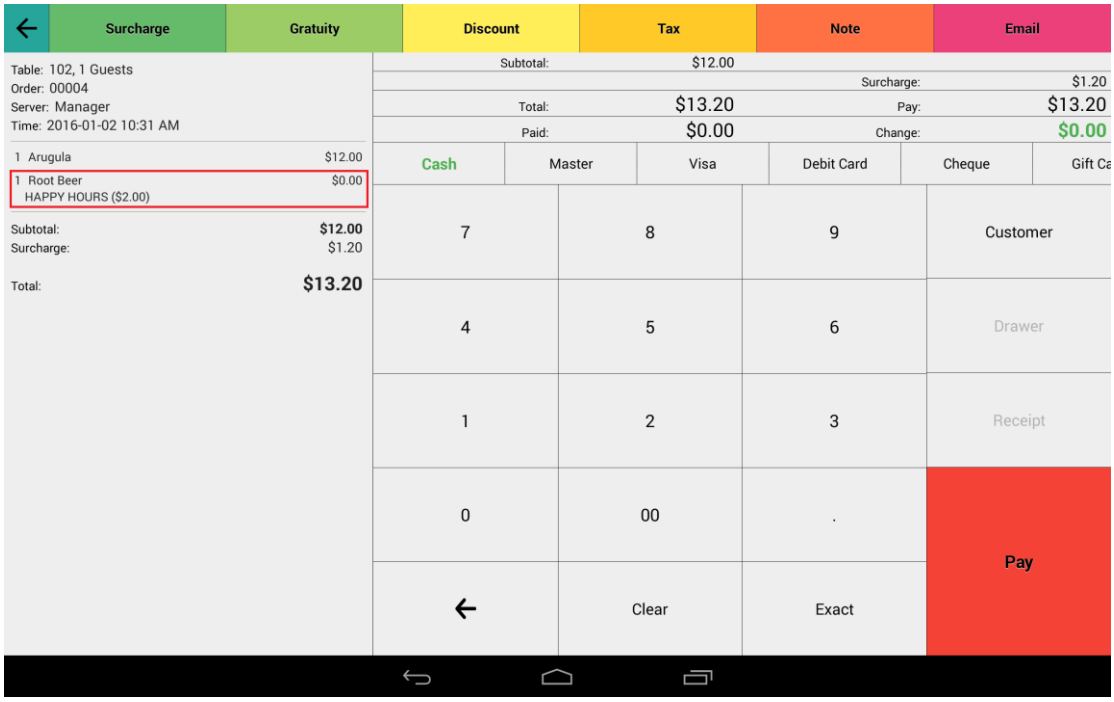
When you taking order, the item price will be automatically discount.



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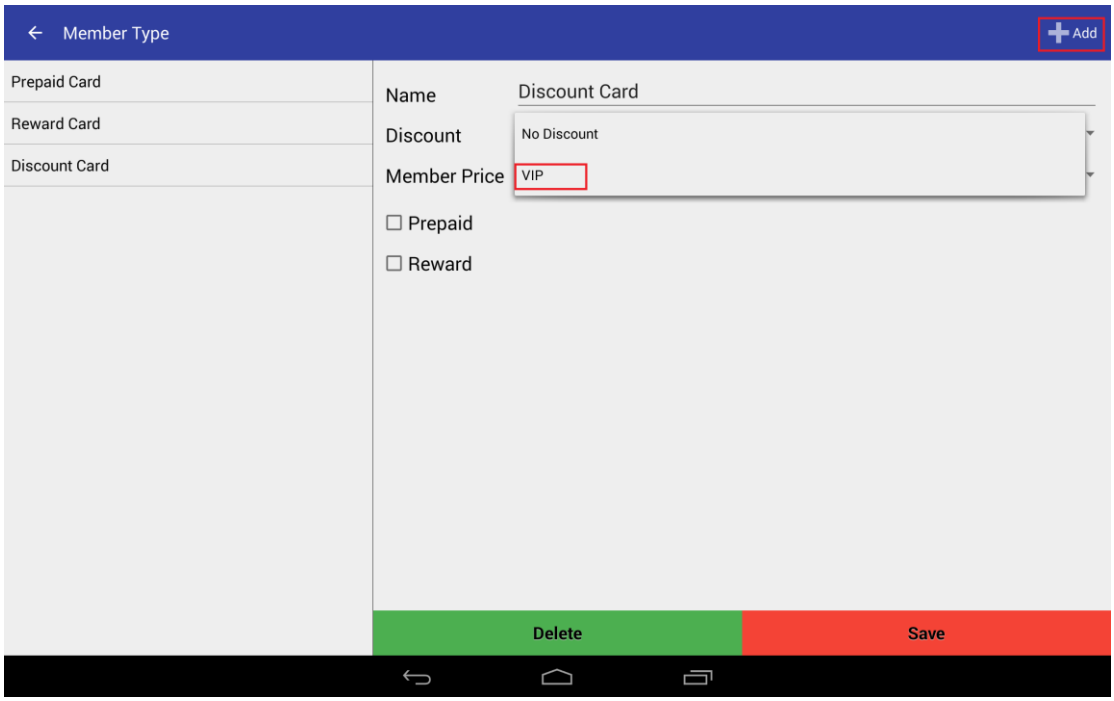
Chapter 11: How to Use Member Discount

From the Table Screen Menu, go to Member > Member Type.

Tap the Add icon to add a new member type. In the Discount field, choose Discount, which is set in the Settings.



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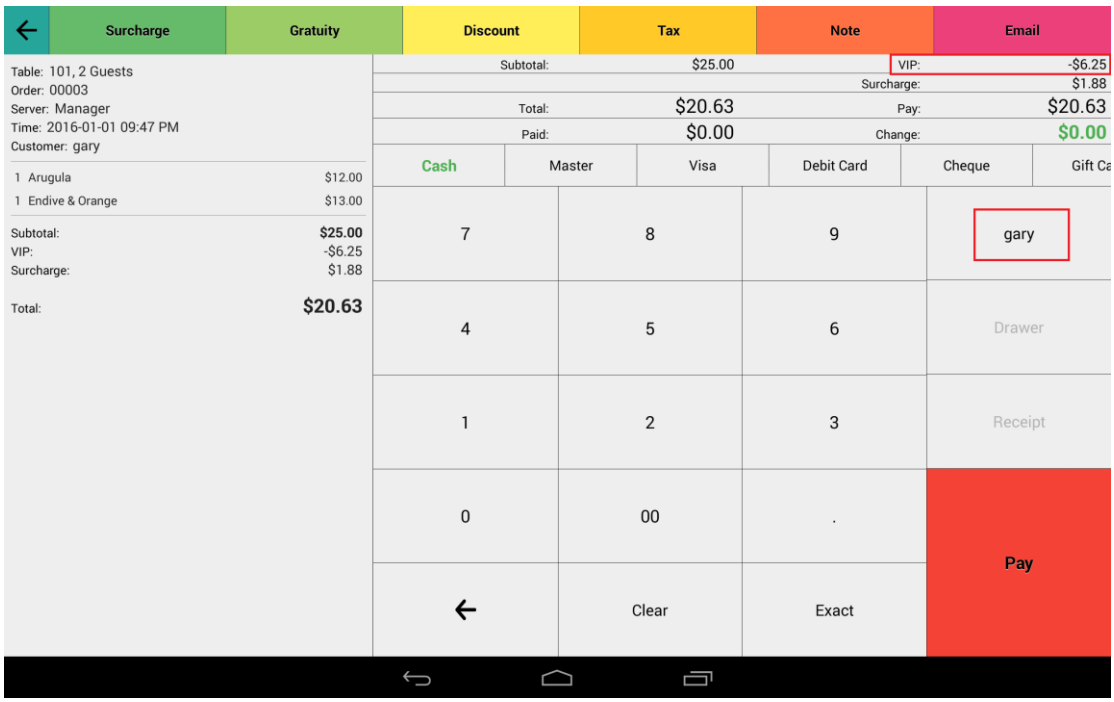
Then go to the Customer list and tap a customer, then assign the customer to be the one having privilege of discount.

When you close the order, choose the customer, the discount will be automatically applied to the order.



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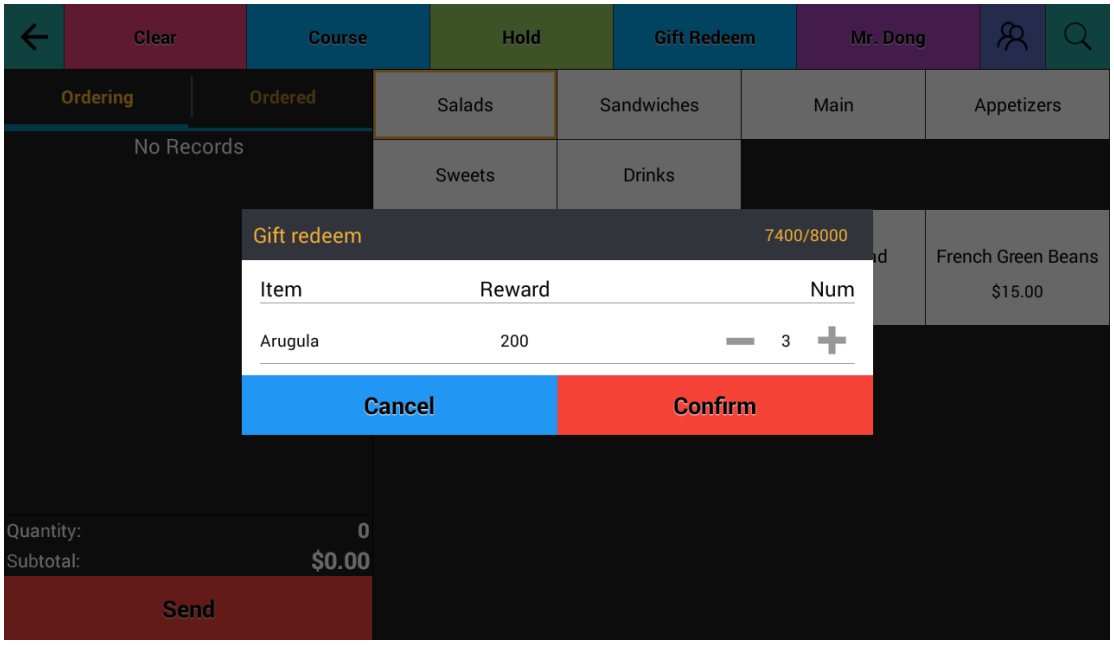
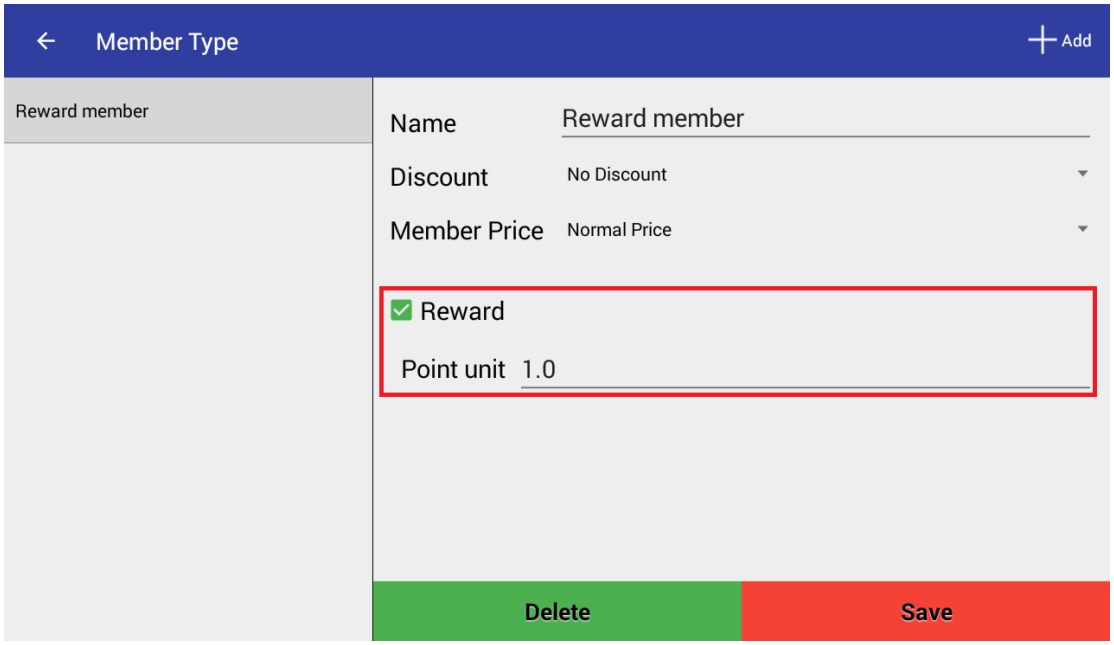
Chapter 12: How to Use Member Reward

When a customer wants to redeem free item, which is called gift, his Member reward points will be consumed.



To beginning using the member reward, you have to create a new member type, whose reward checkbox is checked. Point unit means how much reward a customer can get when consuming $1.



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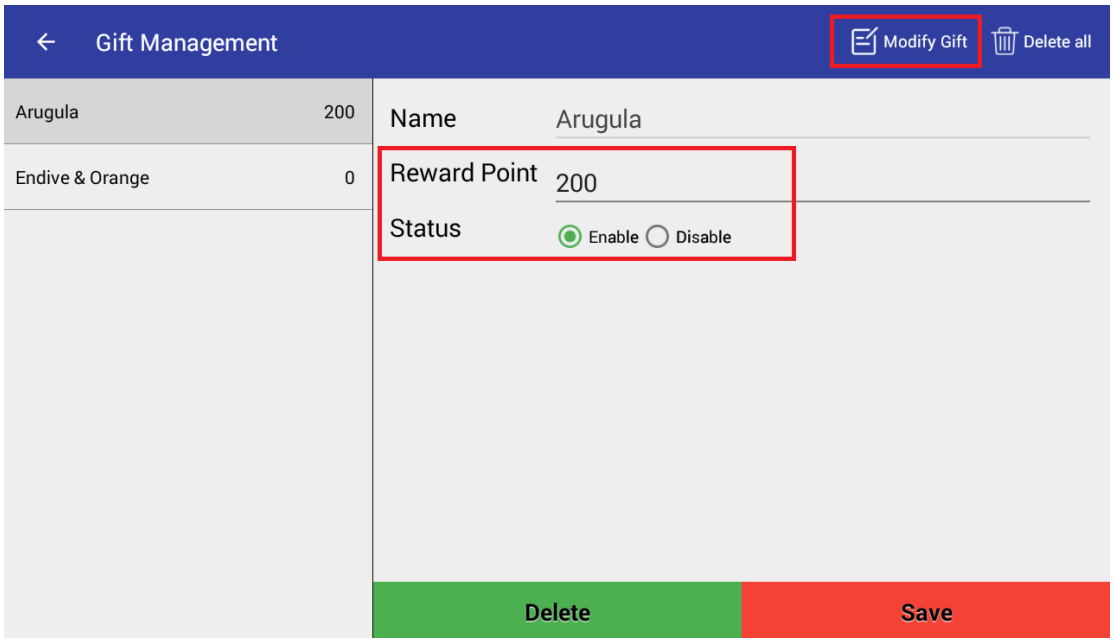
Then go to Member -> Gift management, you can select which item to be the gift by tapping Modify Gift. Also, remember to input the reward point the item worth, and enable this item to be a gift.



Go to the Customer screen and tap a customer, assign the customer to be a reward member. You can adjust the customer's reward in this screen as well.

Finally, select the customer who is reward member when place an order. The Gift Redeem icon will show up after you select the customer.

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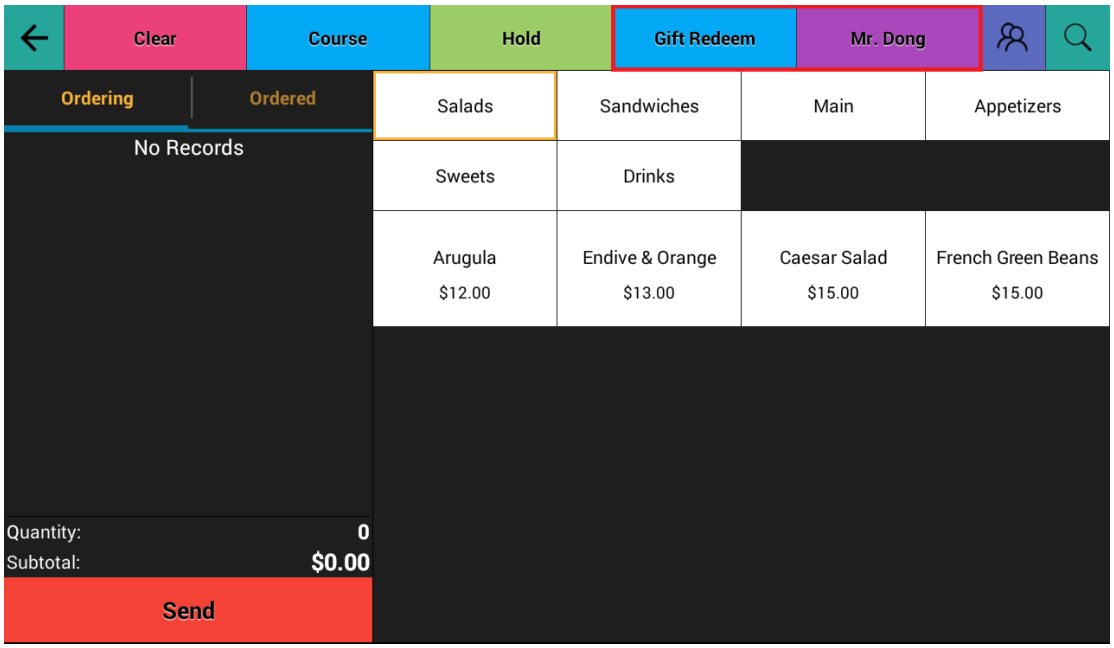

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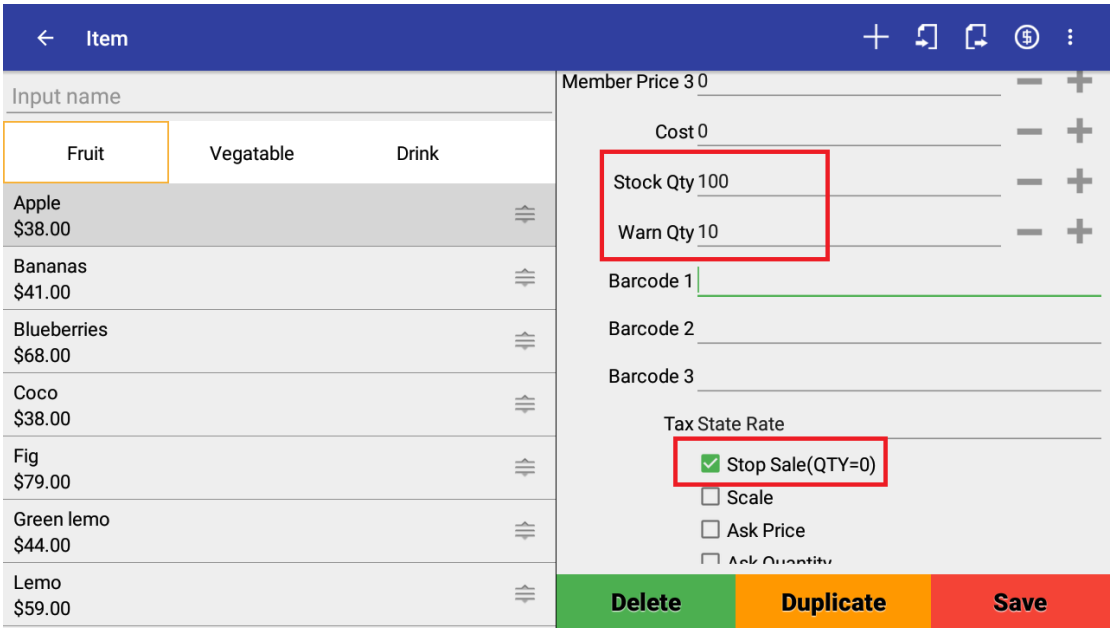
Chapter 13: How to Use Inventory

W&O Retail POS has two kinds of inventory managements. You can choose one of them base on your need. We will explain one by one.

13.1 Inventory Management - Disable means using Item setting for the inventory management. It is the simple and easy way.

1. Choose Disable from Inventory management.

2. Setup Stock Qty, Warn Qty and Stop Sale in Item Settings



3. If the stock quantity is below warn quantity, it will show warning dialog while ordering.

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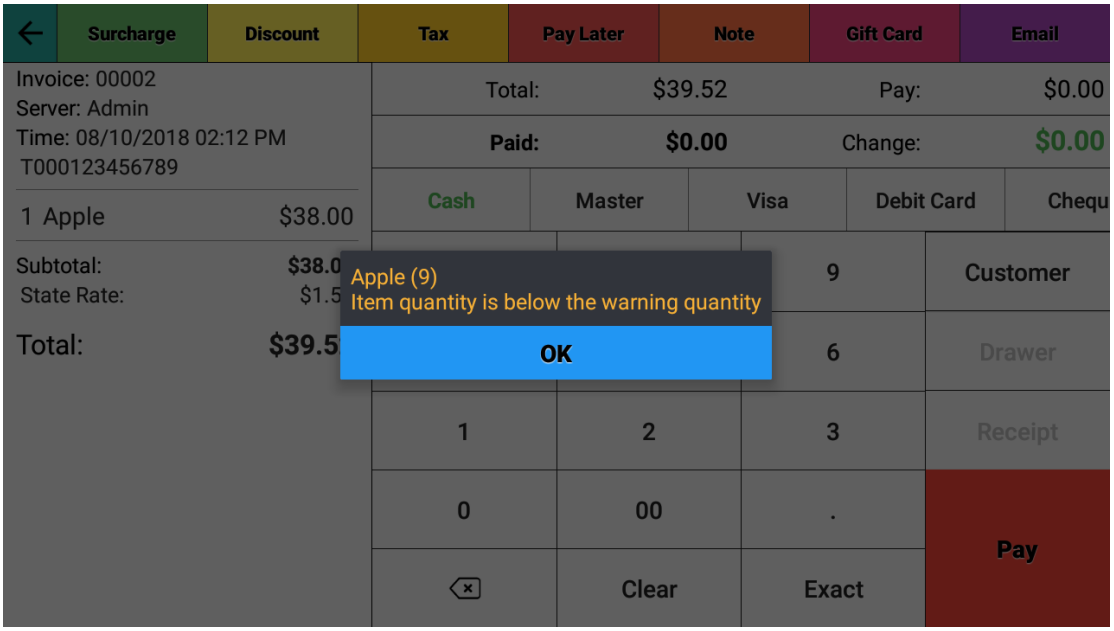
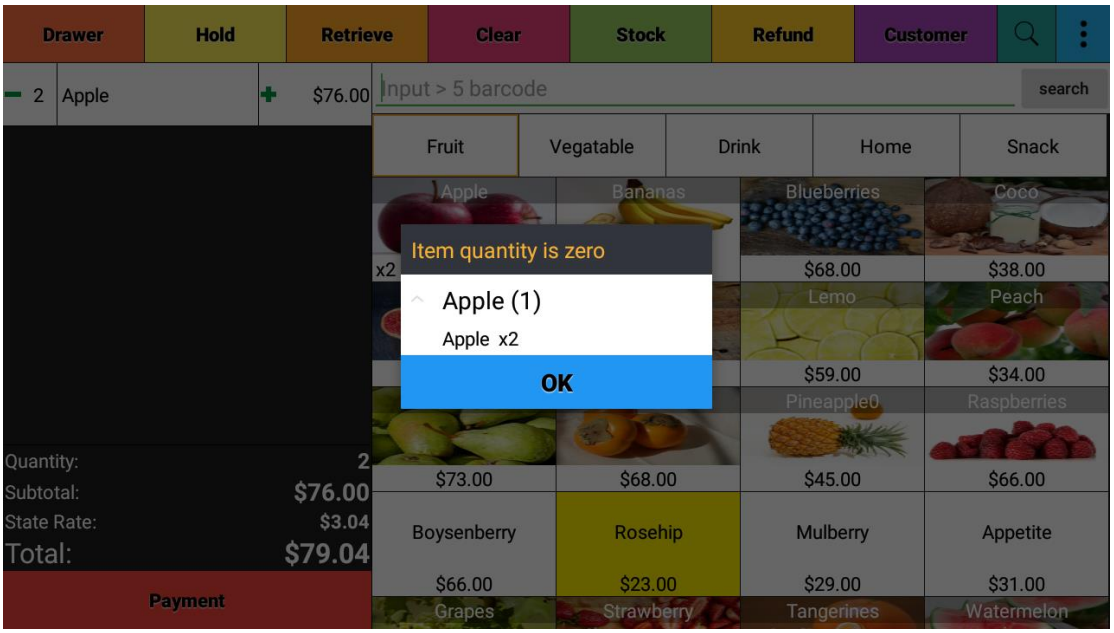


4. If the stock quantity is zero, it will not allow sale while ordering.



5. If you choose Allow Minus Quantity, warn quantity and stop sale will be disable automatically, and the Stock Quantity will be negative.

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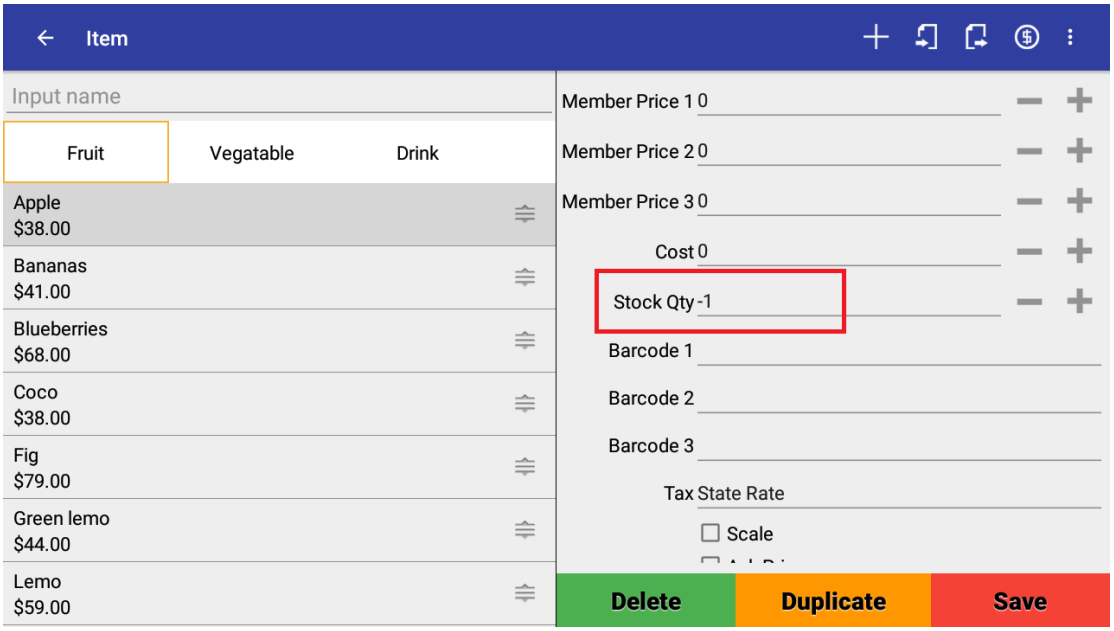

13.2 Inventory Management - Standard Inventory.

1. Choose Standard Inventory from Inventory management.

2. Go to Standard Inventory>Purchase Order, then create Purchase Order.

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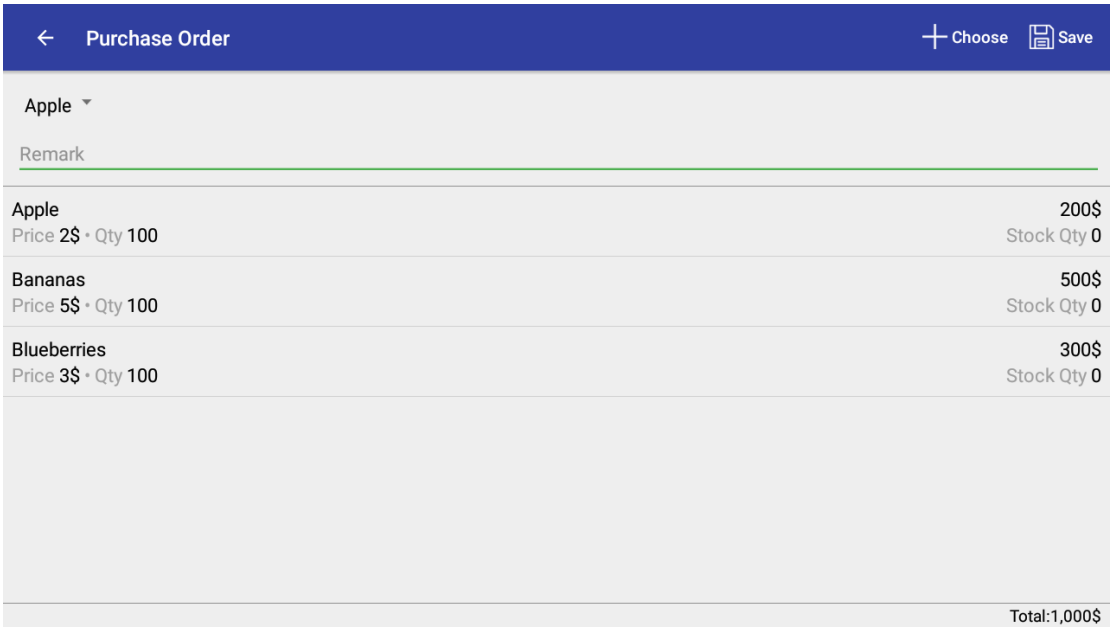
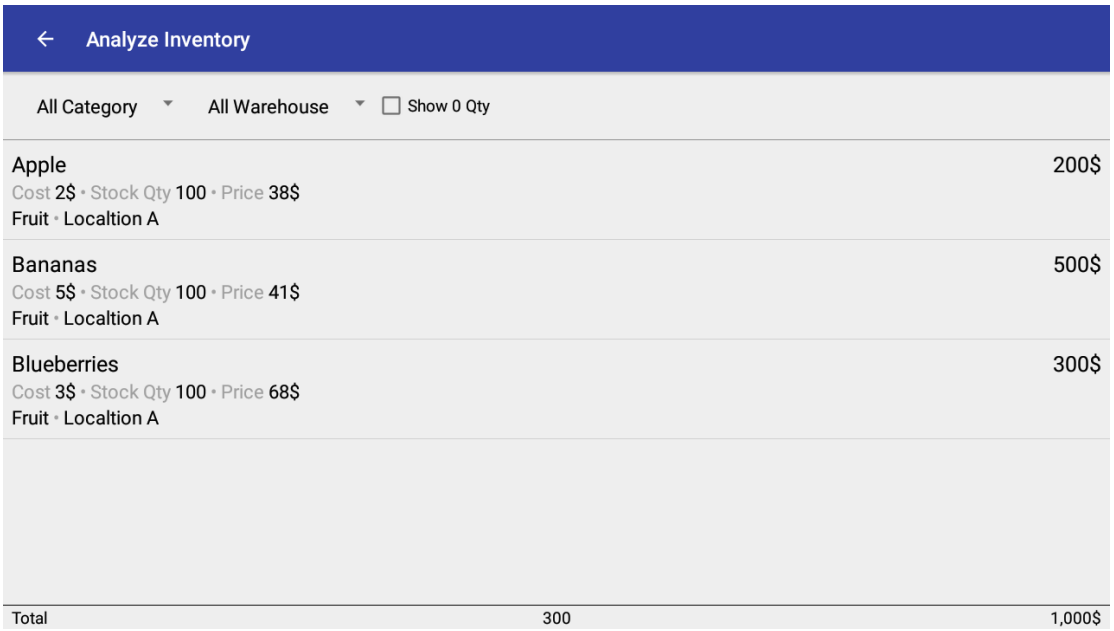


3. Check the Item Quantity after purchase order. Then you can sell item.



4. At end of month, you can count Item Quantity

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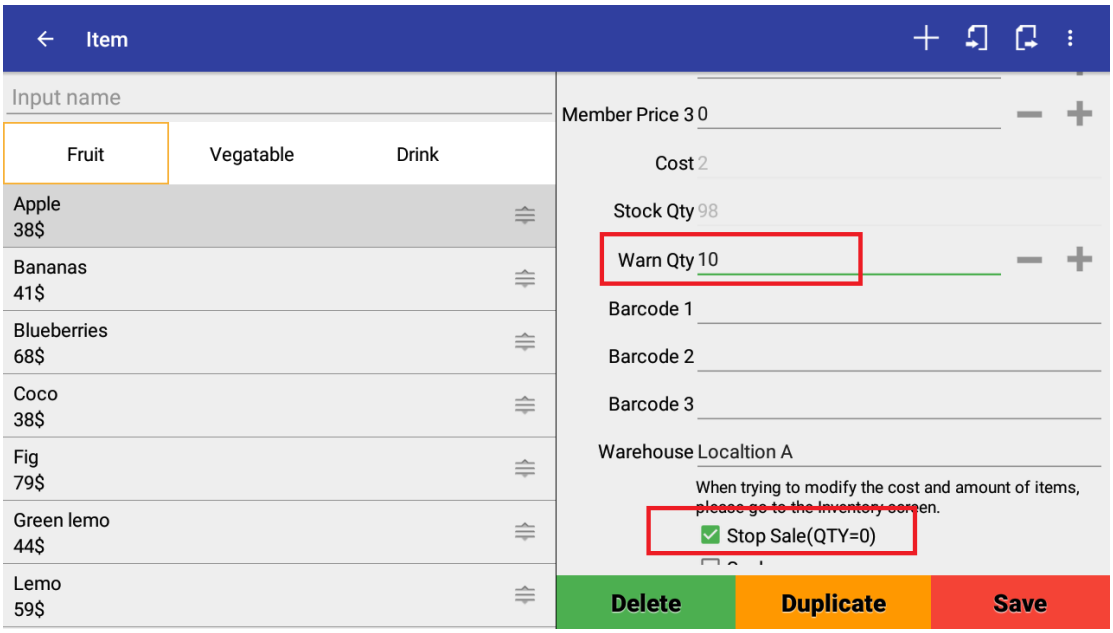
5. To use Warn Qty and Stop Sale, you can setup in item.



6. If the stock quantity is below warn quantity, it will show warning dialog while ordering.

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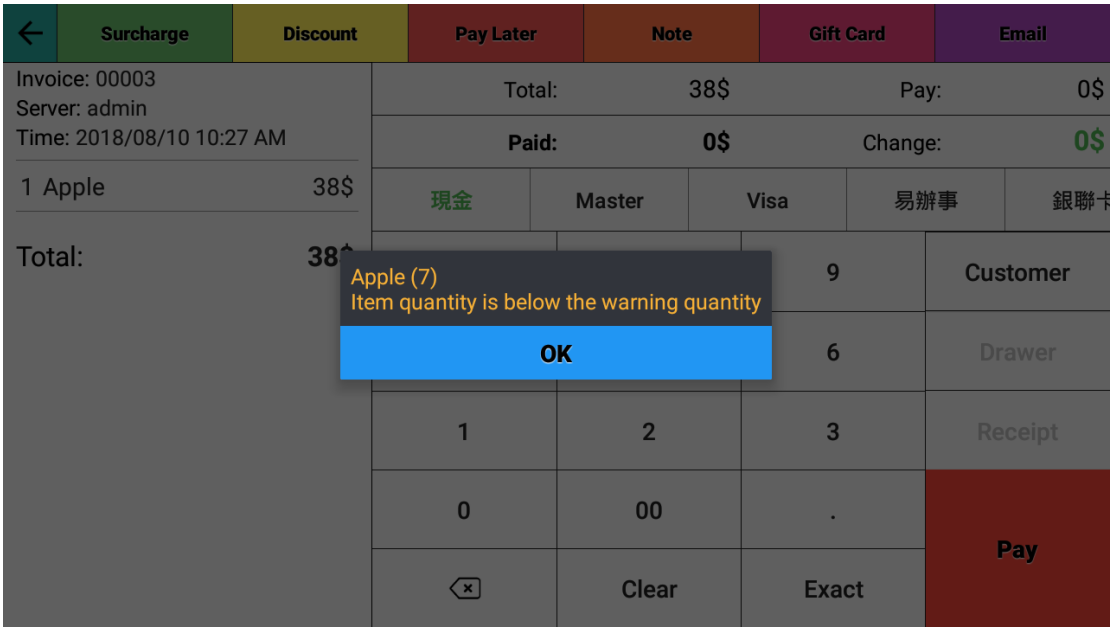
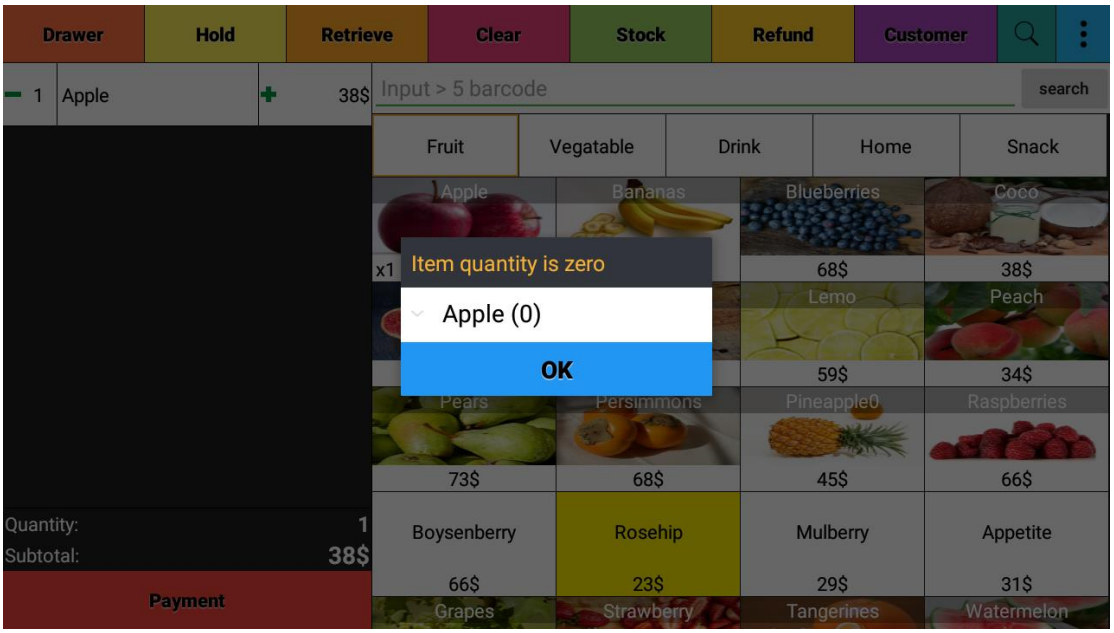


7. If the stock quantity is zero, it will not allow sale while ordering.



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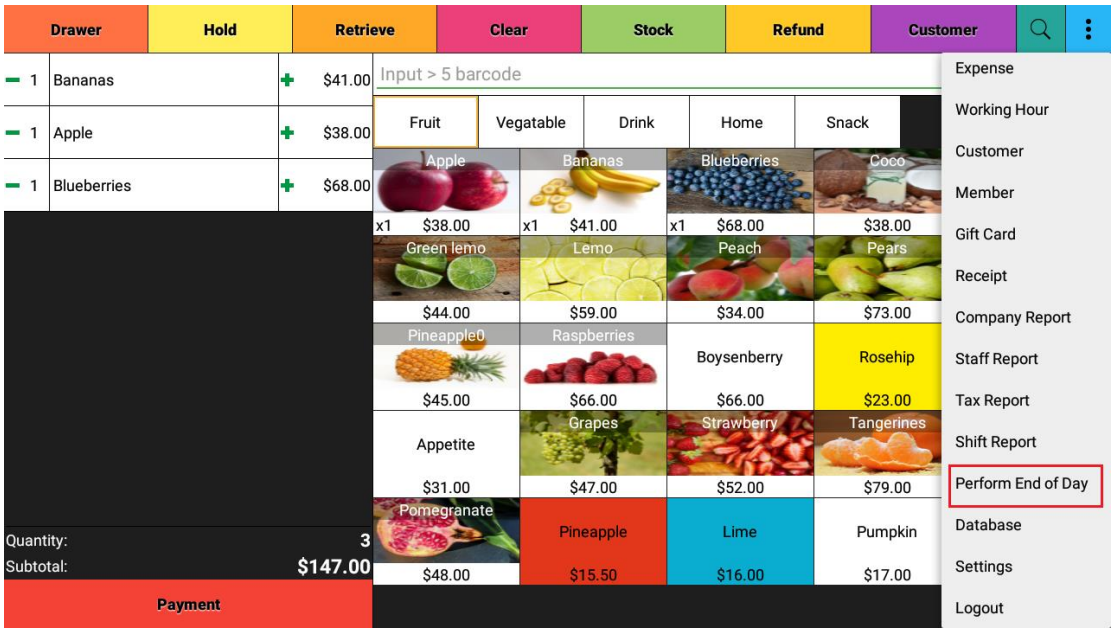
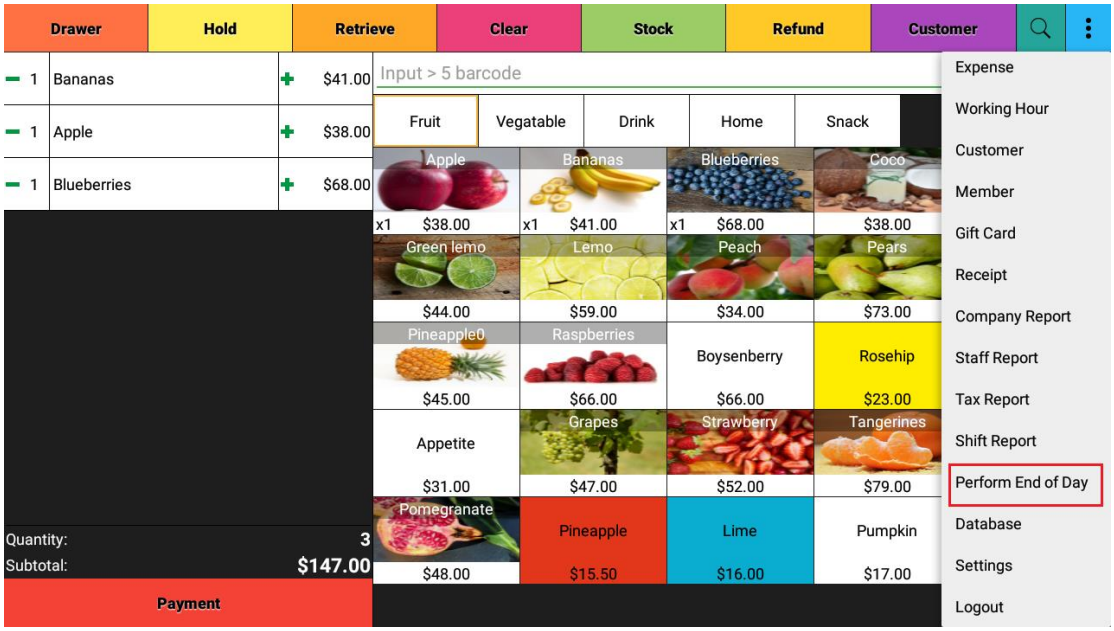
Chapter 14: How to Perform End of Day

1. Login Manager, tap Menu>Perform End of Day



2. On the Perform End of Day Dialog, it shows a checklist for the End of Day. For each item, you can take the appropriate action.



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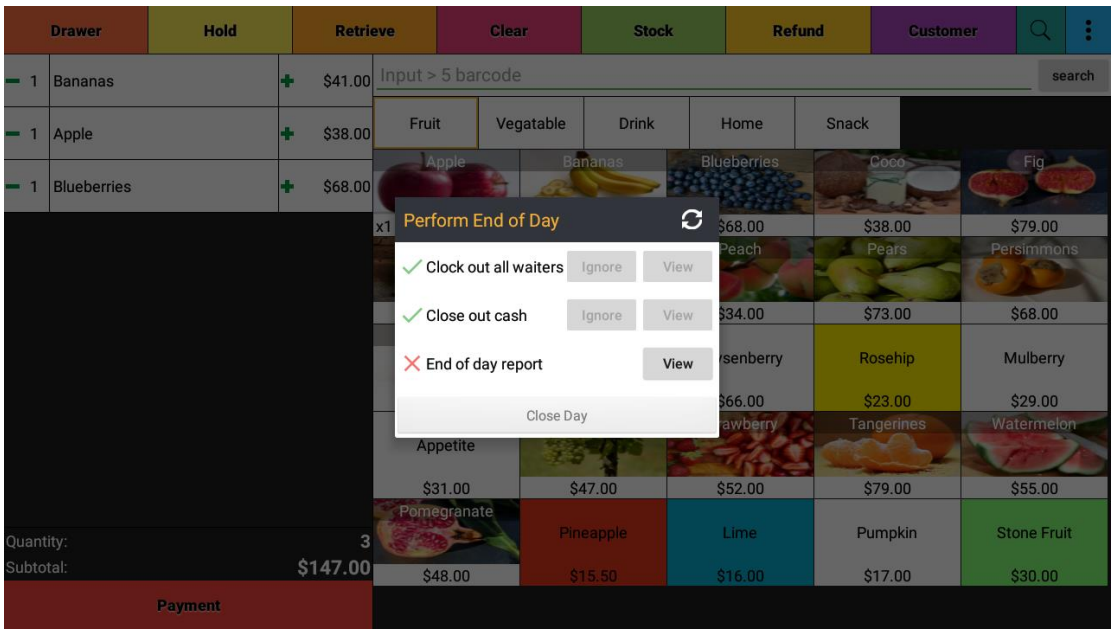
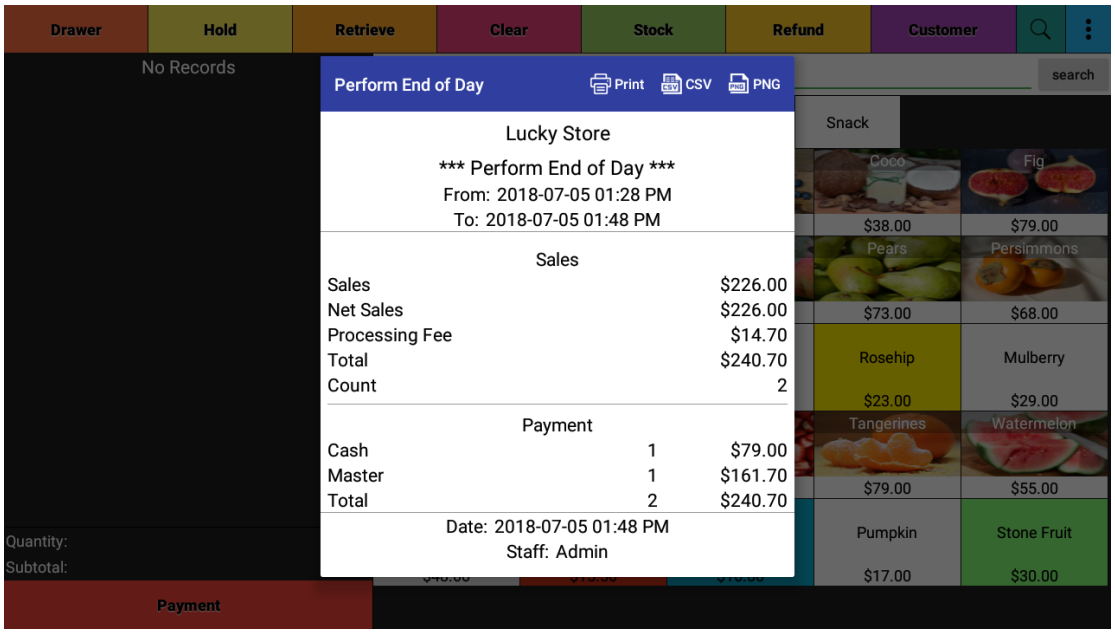
3. After previous items are checked, you can view End of Day Report



4. On the End of Day Report, you can print the report on Report Printer, Email the report in PNG format or export the report in CSV format.



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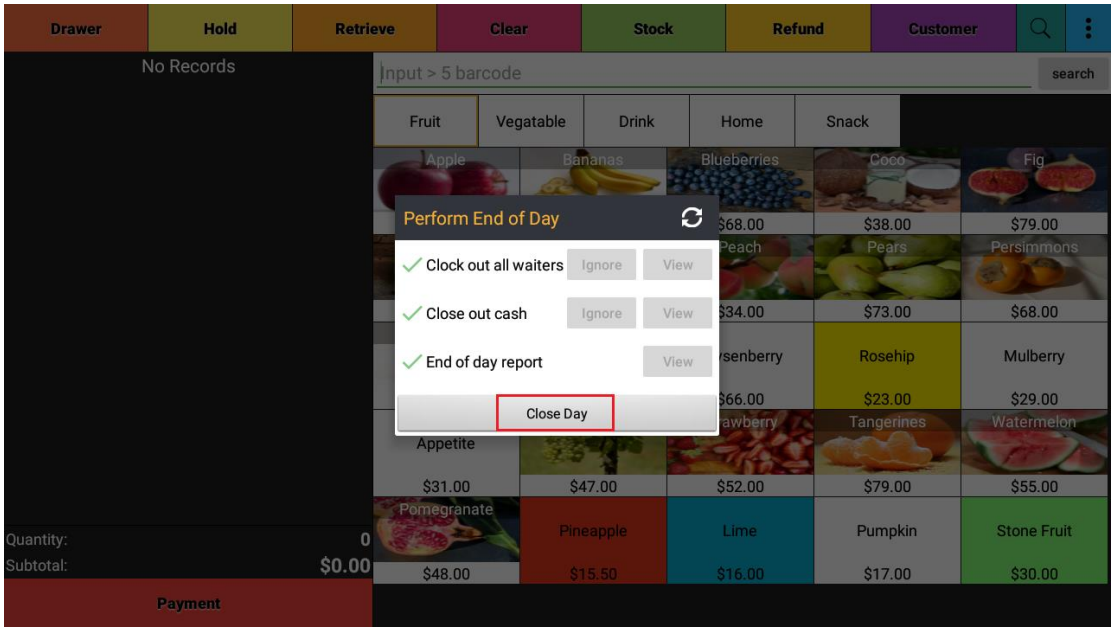
5. After back to the Perform End of Day Dialog and all items checked, you can close day.



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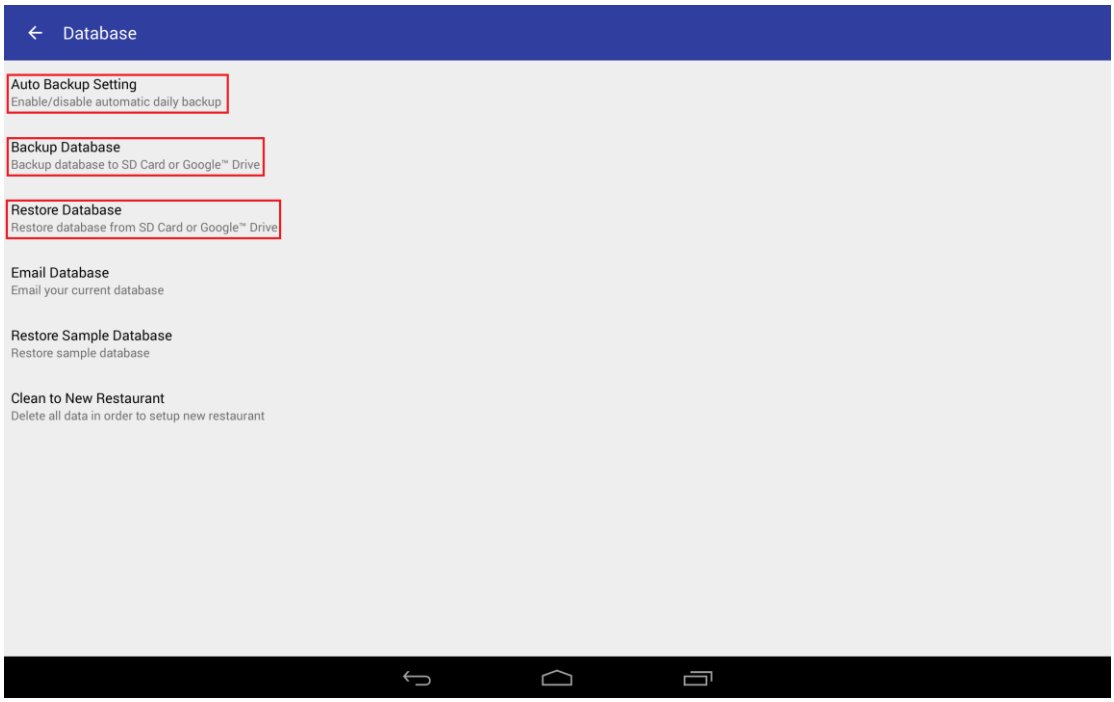
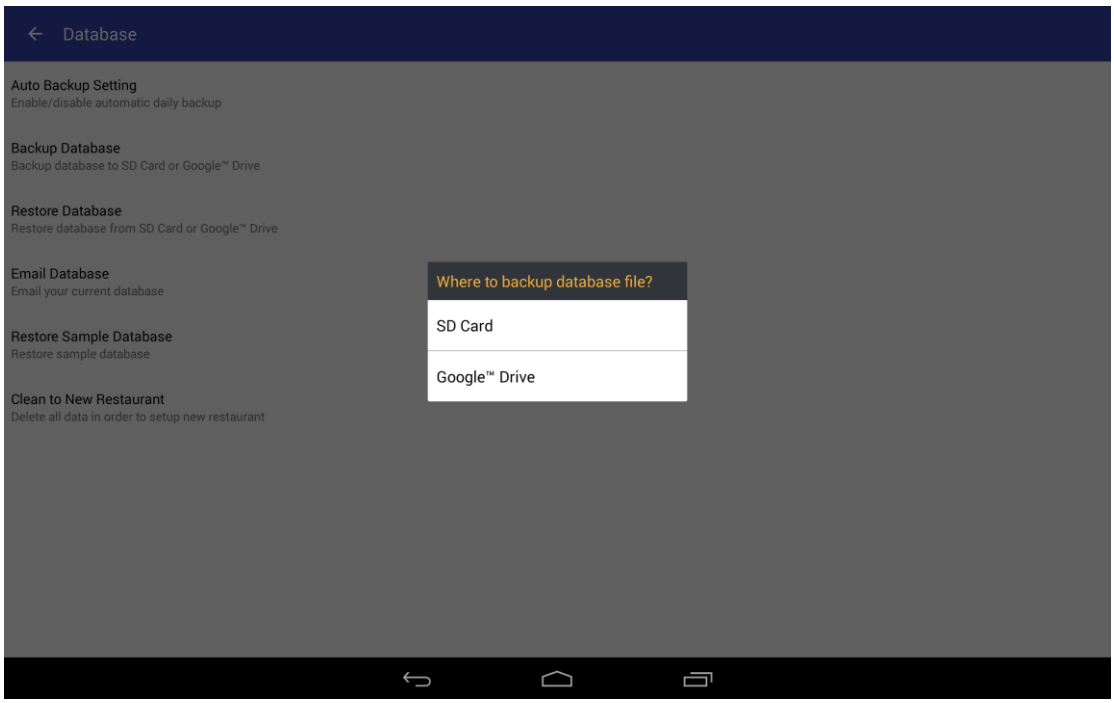
Chapter 15: How to Backup and Restore Database

W&O POS app saves all data locally; the server version saves on your server (Your Windows Server computer). You should regularly backup database to ensure in the event of a disaster or hardware problem, so that you can recover your data.



1. You can backup database to SD Card, internal storage or Google Drive



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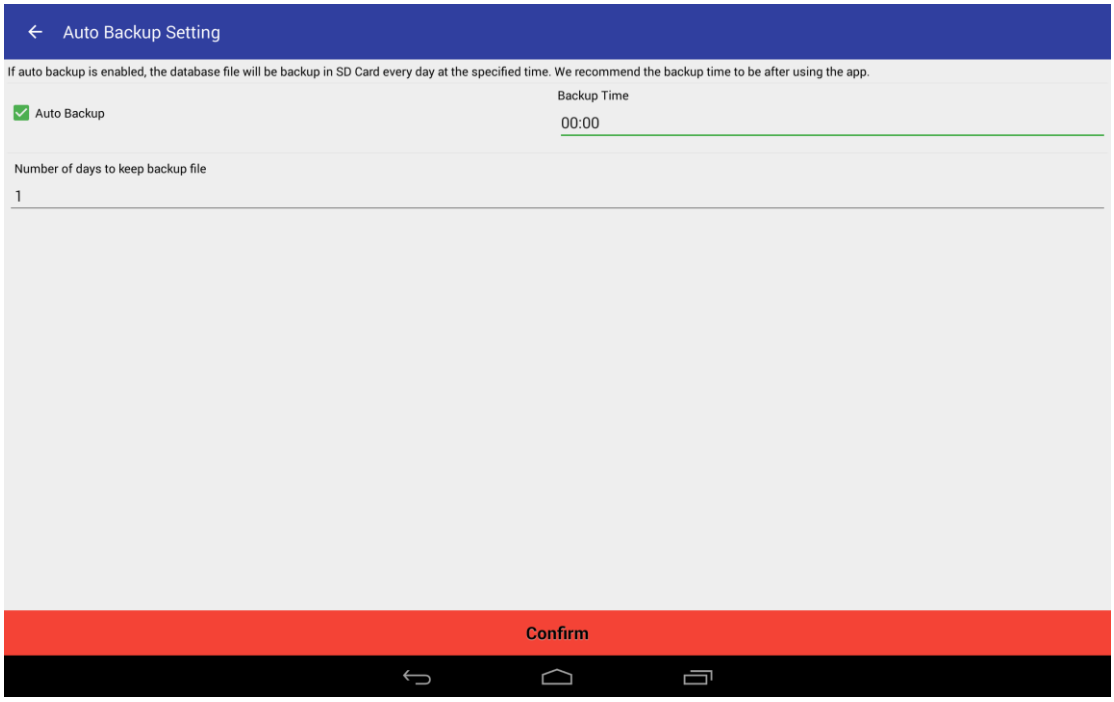
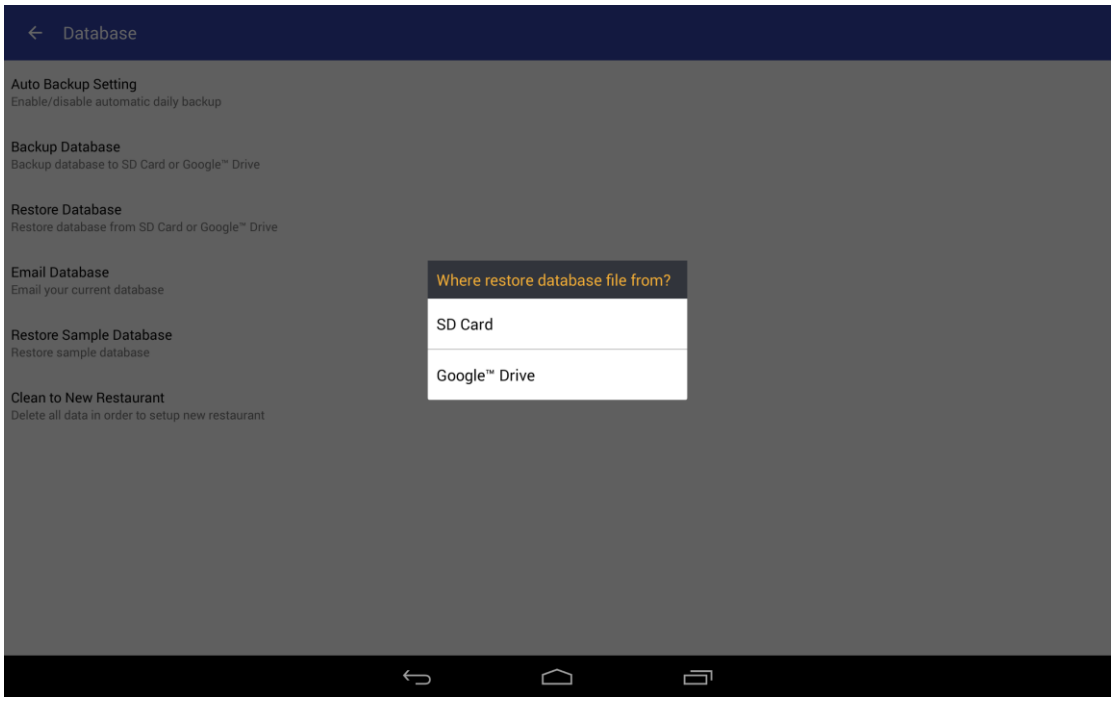
2. You also can setup auto backup database



3. After you have backup database, then you can recover the database from SD Card, internal storage or Google Drive.



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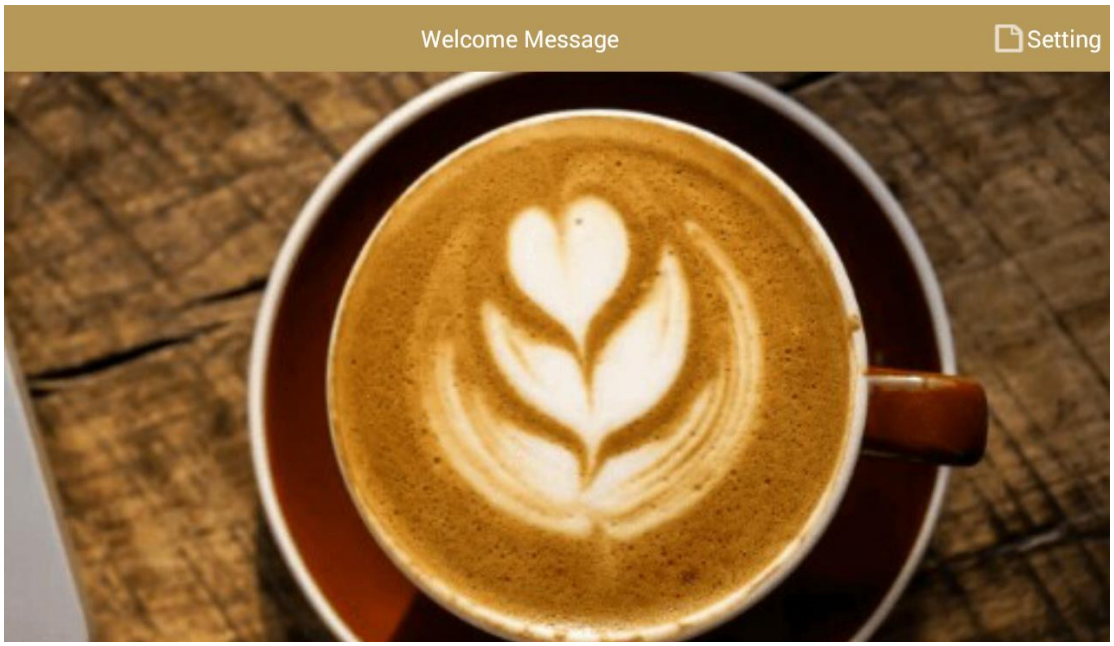
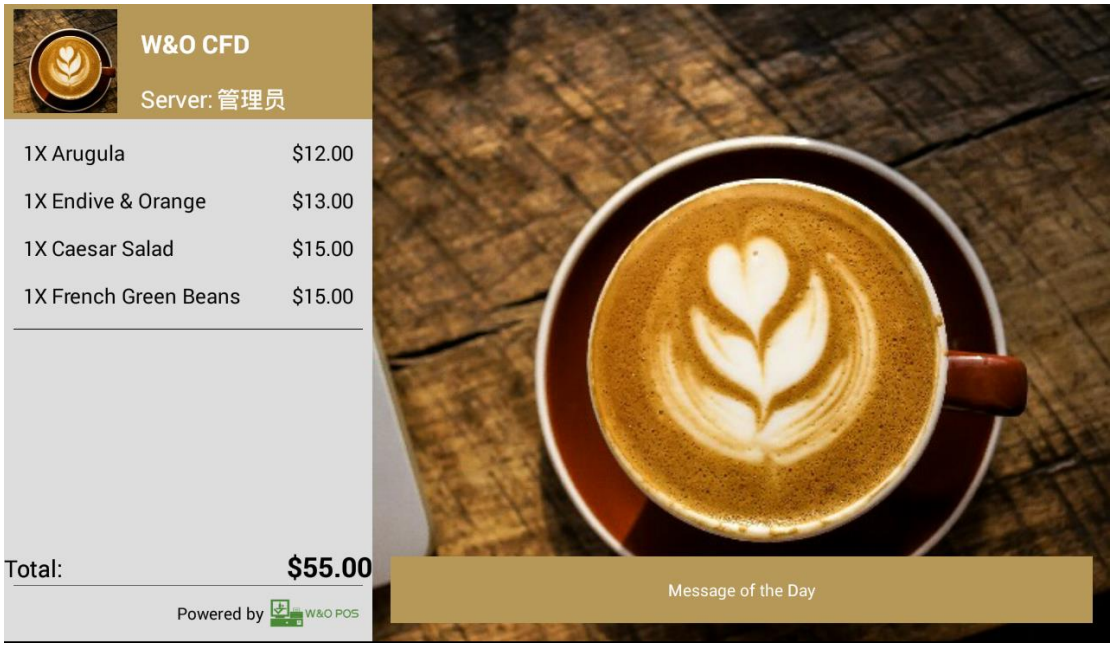
Chapter 16: Customer Display (W&O CFD)

First you need to install CFD in your tablet.

https://play.google.com/store/apps/details?id=com.aadhk.cfd



Run W&O POS Restaurant App, Tap Settings->Device->Customer Display, you can manually input IP of Customer Display or search the IP of Customer Display. Enable the Customer Display before save.



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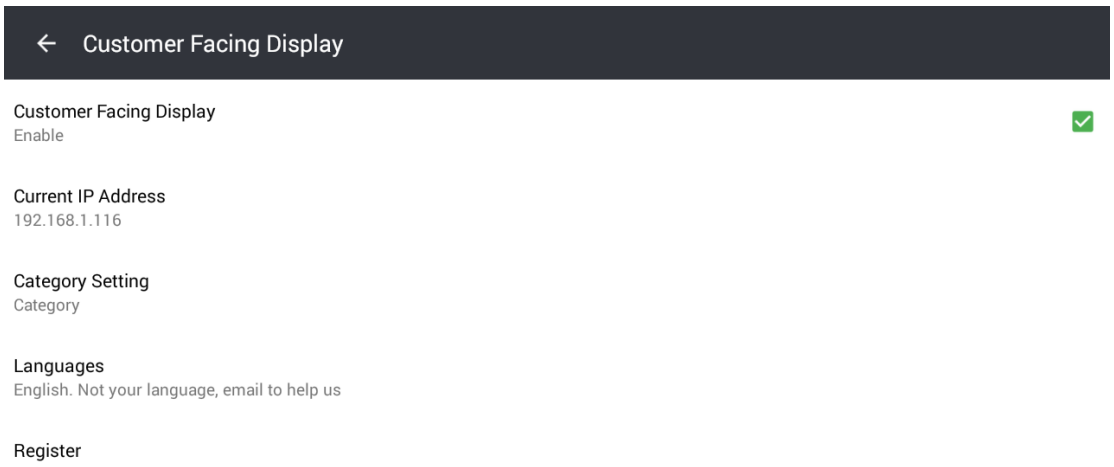
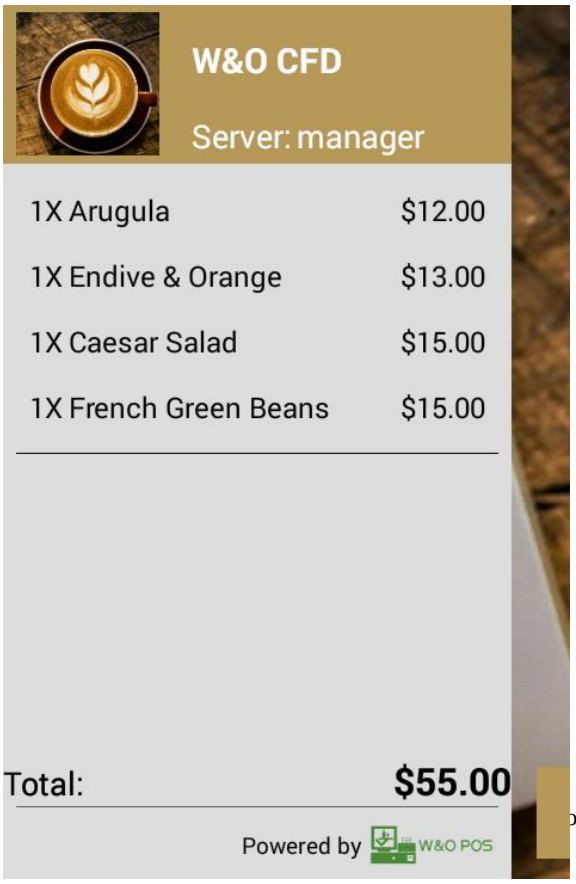
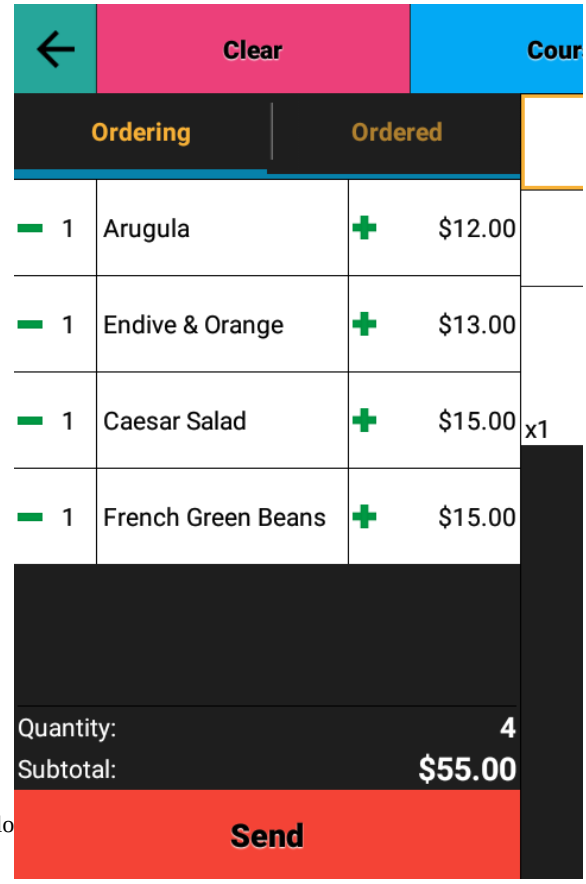


You can select different pictures as your welcome screen and payment screen and edit message of the day.

All the information shown on the left field of POS in the ordering screen, can be shown synchronously on the CFD.

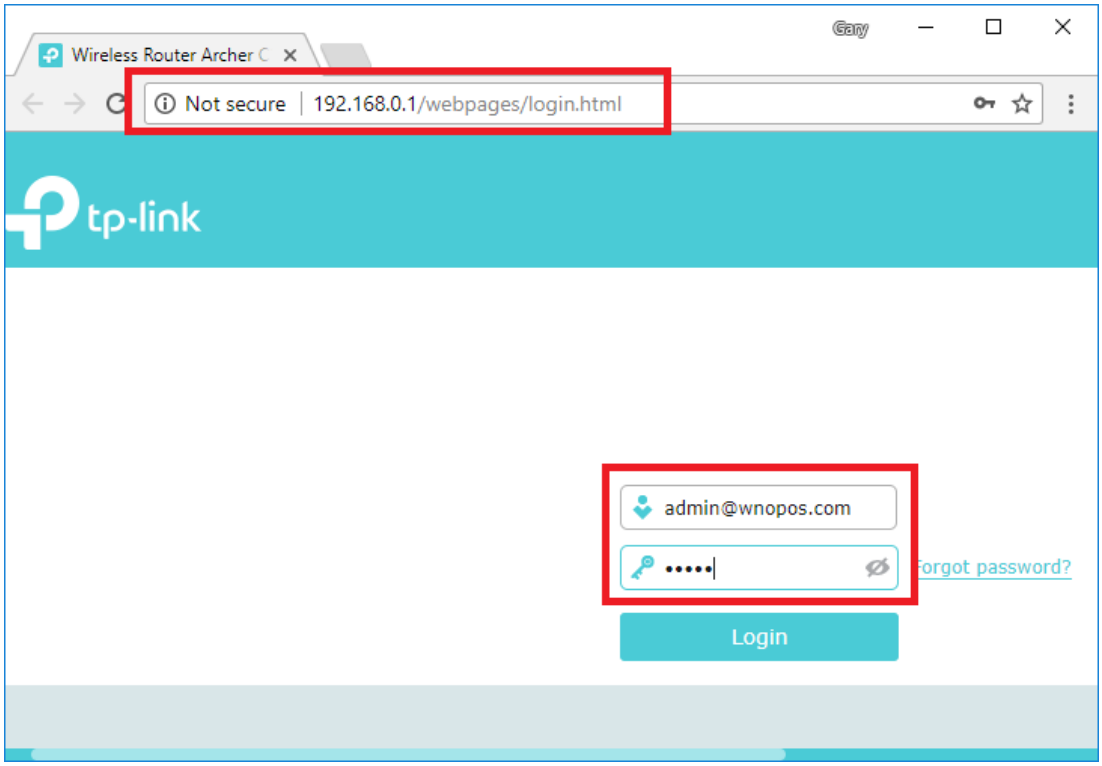




Chapter 17: How to Reserve IP Address by Router

Sometimes, your router may assign different IP to Wi-Fi/Lan printer or windows PC with W&O POS Adapter when you restart router, printer or computer. In that case, you need to assign local static IP to LAN/Wi-Fi Printer or Windows PC. Here is sample of how to assign static IP in TP-Link.

1. Open your browser and input your IP Address http://192.168.0.1 to access Router Admin Portal. Then input user and password to login.



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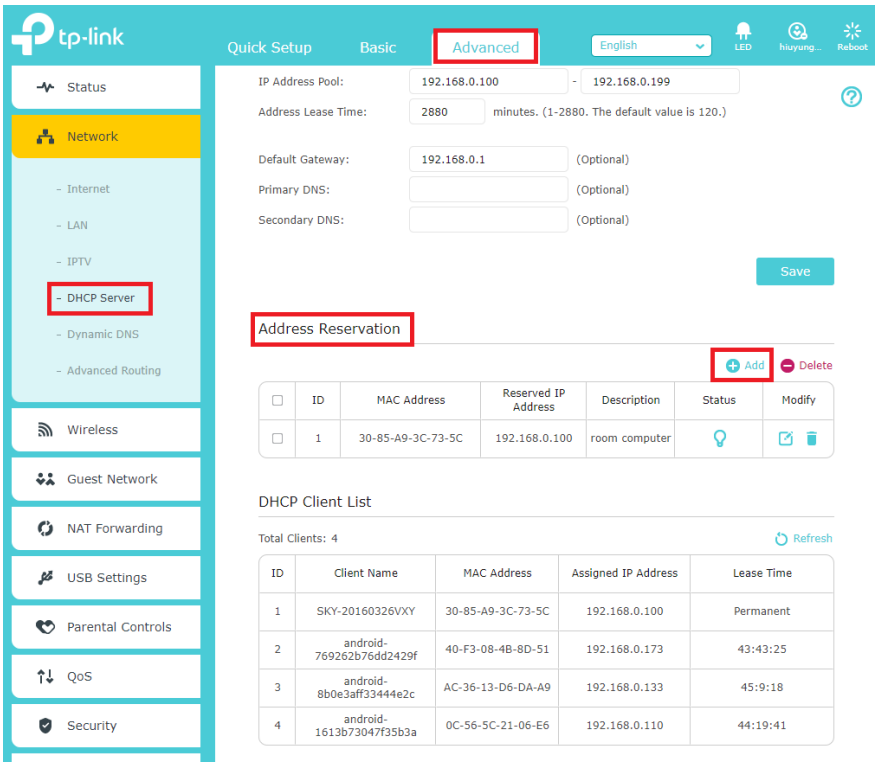
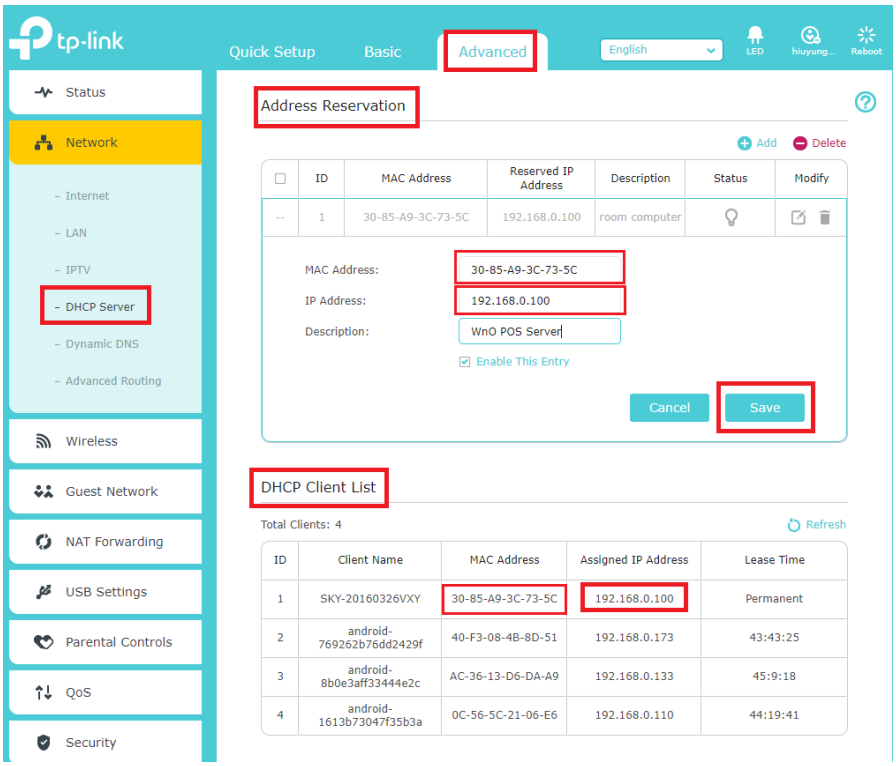
2. Go to Advanced > DHCP Server > Address Reservation, click add



3. On the Address Reservation tab, input Mac Address, IP Address and Description from the DHCP Client List. After input those information, click save.



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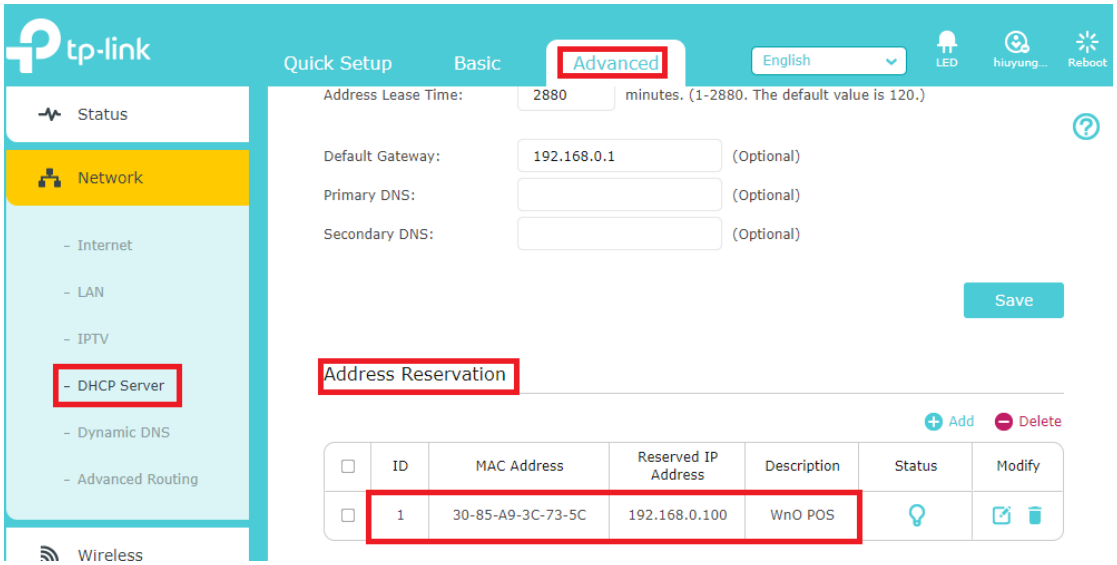
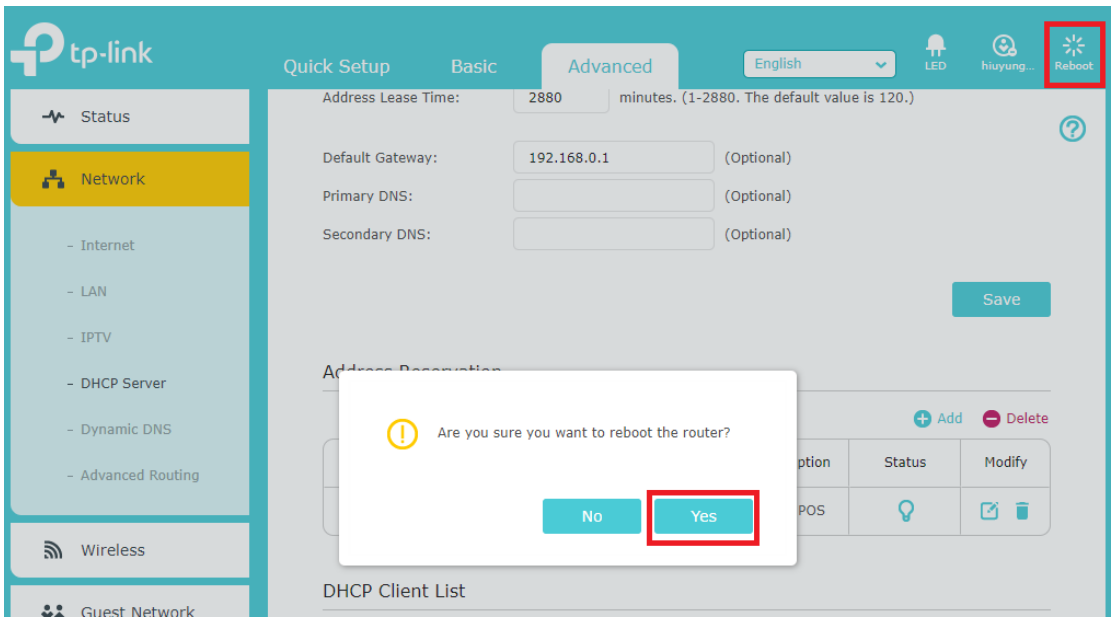
4. You will see the IP Address of Windows PC is reserved on the list.



5. You can reboot the router to activate the setting immediately.



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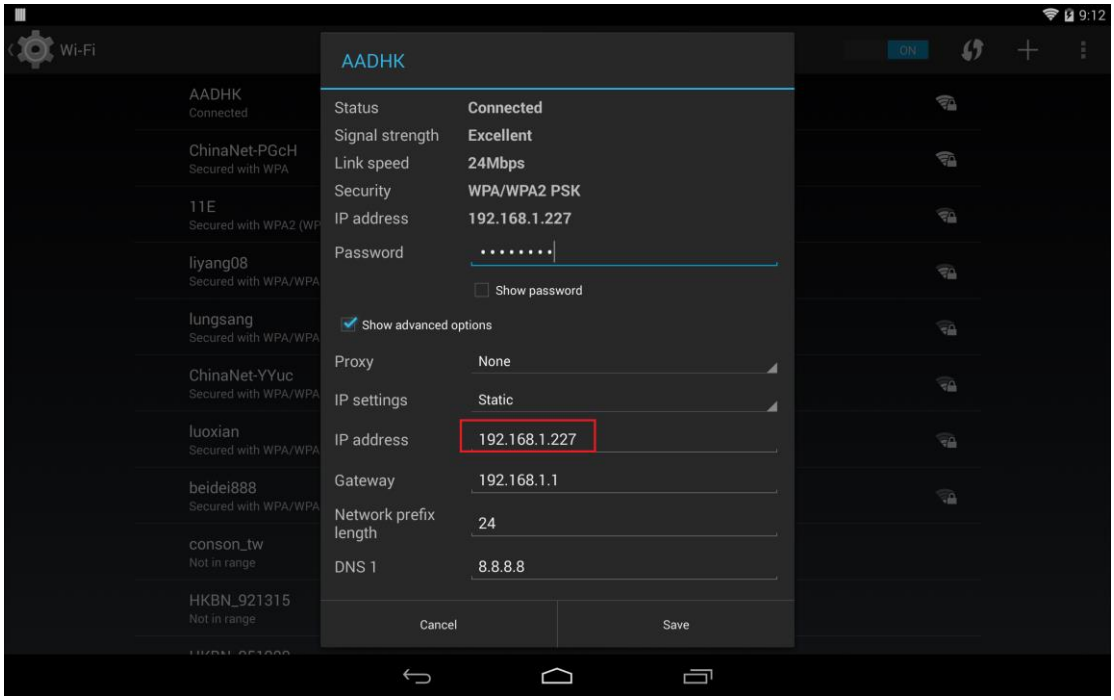
Chapter 18: How to Reserve IP Address in Phone/Tablet

Sometimes, your router may assign different IP to tablet when you restart router or tablet. In that case, you need to assign local static IP to your tablet. Here is sample of how to assign static IP in your tablet.



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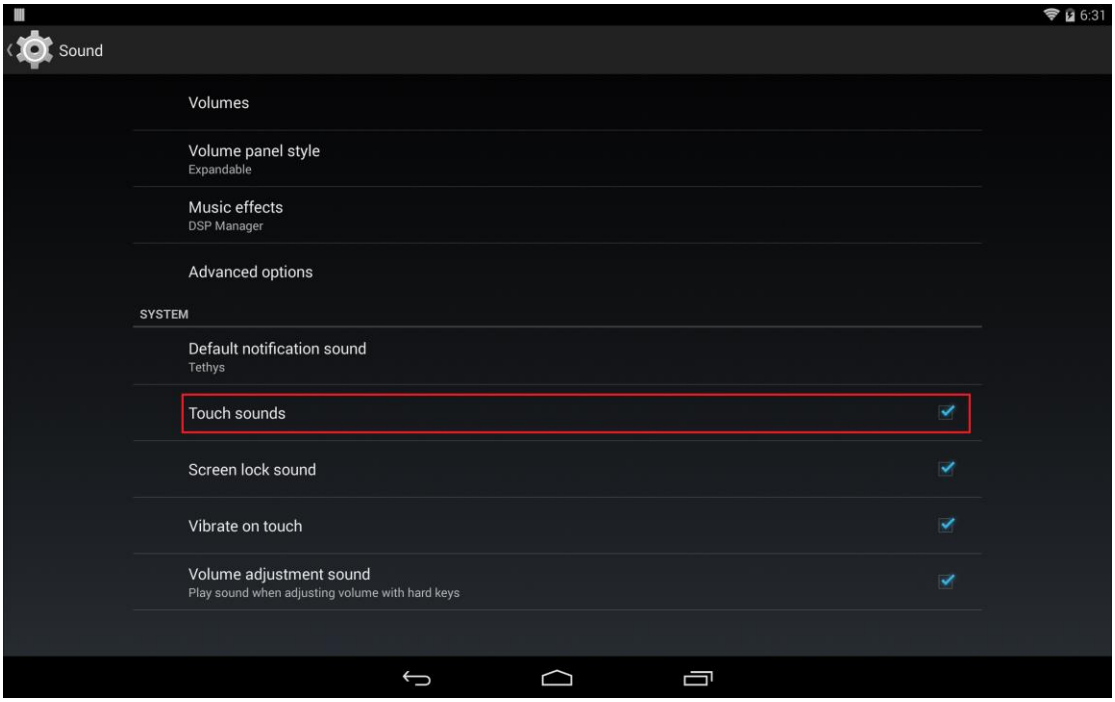
Chapter 19: Problem & Solution

1. You may want Touch sounds when you using W&O POS, you can setup in the android system. You can goes to Settings>Sound>Other sounds, turn on Touch sounds.



End

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