BlueTill Manual

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BlueTill

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1. Introduction

Welcome to BLUETILL

BLUETILL is a powerful multi-user business software that manages every aspect of the business workflow cycle – from stock control, sales activities, servicing and customer contact to invoicing, financials and reporting, as well as email communication.

contact us by email
Ph : +61 411 389 336

2. Support

Have questions? We’ve got answers.

Please send email to support@bluetill.com or call to +61 411 389 336

New Customer Support

After purchasing the BlueTill, you can get free 12 months Phone, TeamViewer support.
You can download BlueTill teamviewer file. Click here

3. What’s New

4. Compare Editions

	Essential Edition	Professional Edition
Item Register	Y	Y
Category, Supplier, Brand	Y	Y
Pos Sale	Y	Y
Pos Touch	Y	Y
Refund	Y	Y
Connect Receipt Printer	Y	Y
Connect Cash Drawer	Y	Y
Connect Barcode Scanner	Y	Y
Reprint Receipt	Y	Y
Use Table Number Holder	Y	Y
Shift (X & Z Report)	Y	Y
Item Modifier	Y	Y
Tyro Integration	Y	Y
Westpac EFTPOS Integration	Y	Y
Kitchen Printer	Y	Y
Sales Report	Y	Y
Graph Report	Y	Y
Training Mode	Y	Y
Staff Maximum Discount Management	Y	Y
Staff Price Change Management	Y	Y
Paid In & Paid Out	Y	Y
Package Item	Y	Y
Export to MYOB	Y	Y
Layby	N	Y
Waste Management	N	Y
Table Order Assignment	N	Y
Customer	N	Y
Customer Discount Level	N	Y

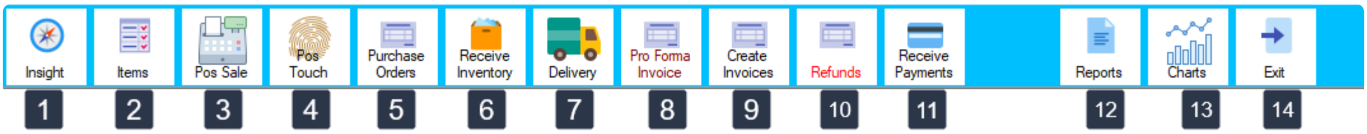
Quotation	N	Y
Pro Forma Invoice	N	Y
Invoice	N	Y
Credit memo	N	Y
Receive Invoice Payment	N	Y
Statement	N	Y
Delivery Setup for Individual Item	N	Y
Period Discount	N	Y
Purchase Order	N	Y
Receive Inventory	N	Y
Return to Supplier	N	Y
Bill Payment	N	Y
Adjustment Inventory	N	Y
Quick Adjustment Inventory	N	Y
Barcode Print	N	Y
Loyalty	N	Y
Gift Voucher	N	Y
Liquor Module	N	Y
Batch Item Management	N	Y

5. Getting Started

5.1. User Interface

The BLUETILL User Interface is intuitive and easy to use. The ability to efficiently access and view live information is achieved using familiar Windows techniques, including left/right mouse click, double click, drag and drop, and drop-down menus. There are four main areas in the user interface.

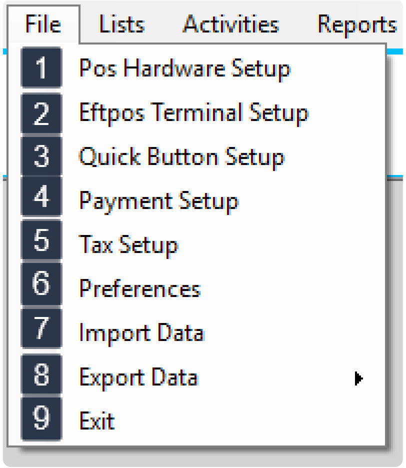
5.1.1. Icons


Insight
Items
Pos Sale
Pos Touch
Purchase Orders
Receive Inventory
Delivery
Pro Forma Invoice
Create Invoices
Refunds
Receive Payments
Reports
Charts
Exit
1
2
3
4
5
6
7
8
9
10
11
12
13
14

1	Quick access to business activities including pro forma invoice, invoice, POS, cash up, purchase, delivery and back order trackdown
2	View Item list
3	Pos sales screen
4	Pos sales screen for touch screen devices
5	Create purchase order
6	Create supplier’s invoice
7	Open delivery
8	Create Pro forma invoice
9	Create invoice for customer
10	Create credit memo for customer
11	Receive payments from customer
12	View reports
13	View charts
14	Exit BLUETILL

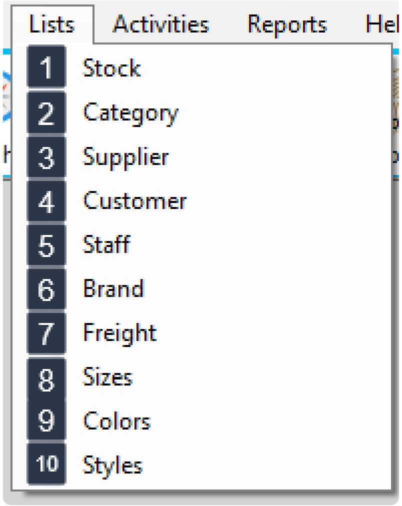
5.1.2. Window Menus

1. File


File
Lists
Activities
Reports
1 Pos Hardware Setup
2 Eftpos Terminal Setup
3 Quick Button Setup
4 Payment Setup
5 Tax Setup
6 Preferences
7 Import Data
8 Export Data
9 Exit

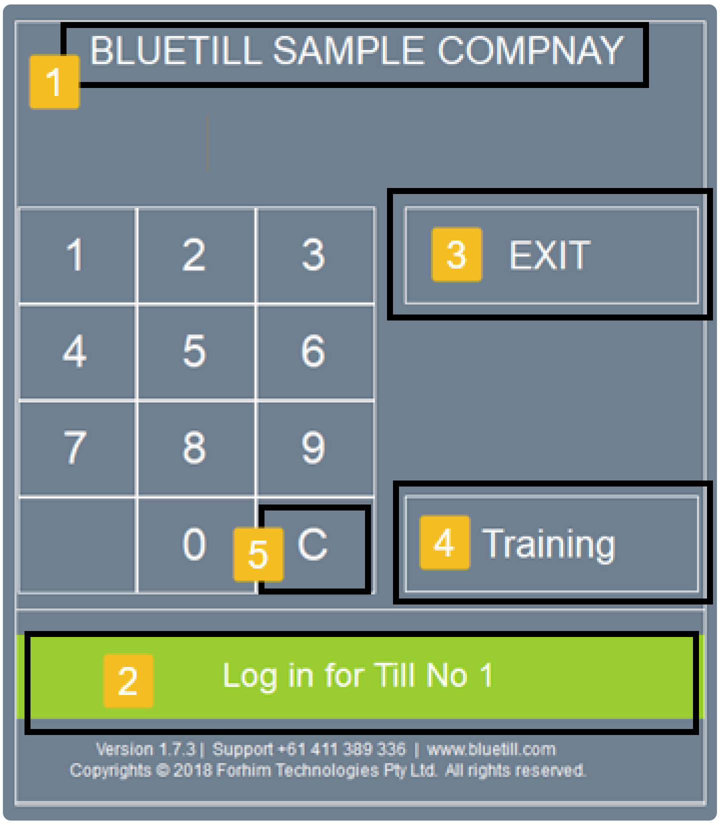
1	Setup receipt printer, receipt header, receipt footer and cash drawer
2	Setup Tyro and Westpac Presto Smart EFTPOS terminals
3	Setup screen button for POS touch screen
4	Setup payment type
5	Setup tax code and rate
6	Setup company details, terms and conditions on invoice, email and other options
7	Import data from Xero, BizManager
8	Export data
9	Exit BLUETILL

2. Lists


Lists
Activities
Reports
Hel
1 Stock
2 Category
3 Supplier
4 Customer
5 Staff
6 Brand
7 Freight
8 Sizes
9 Colors
10 Styles

1	View stock. You can add, edit or delete stock
2	View categories. You can add, edit or delete categories
3	View suppliers. You can add, edit or delete suppliers (vender)
4	View customers. You can add, edit or delete customers
5	View staff. You can add, edit or delete staff
6	View brands. You can add, edit or delete brands
7	View freight. You can add, edit or delete freight
8	View sizes. You can add, edit or delete sizes
9	View colours. You can add, edit or delete colours
10	View styles. You can add, edit or delete styles

5.1.3. Login


BLUETILL SAMPLE COMPNAY
1
1
2
3
3
EXIT
4
5
6
7
8
9
0
5
C
4
Training
2
Log in for Till No 1

Version 1.7.3 | Support +61 411 389 336 | www.bluetill.com
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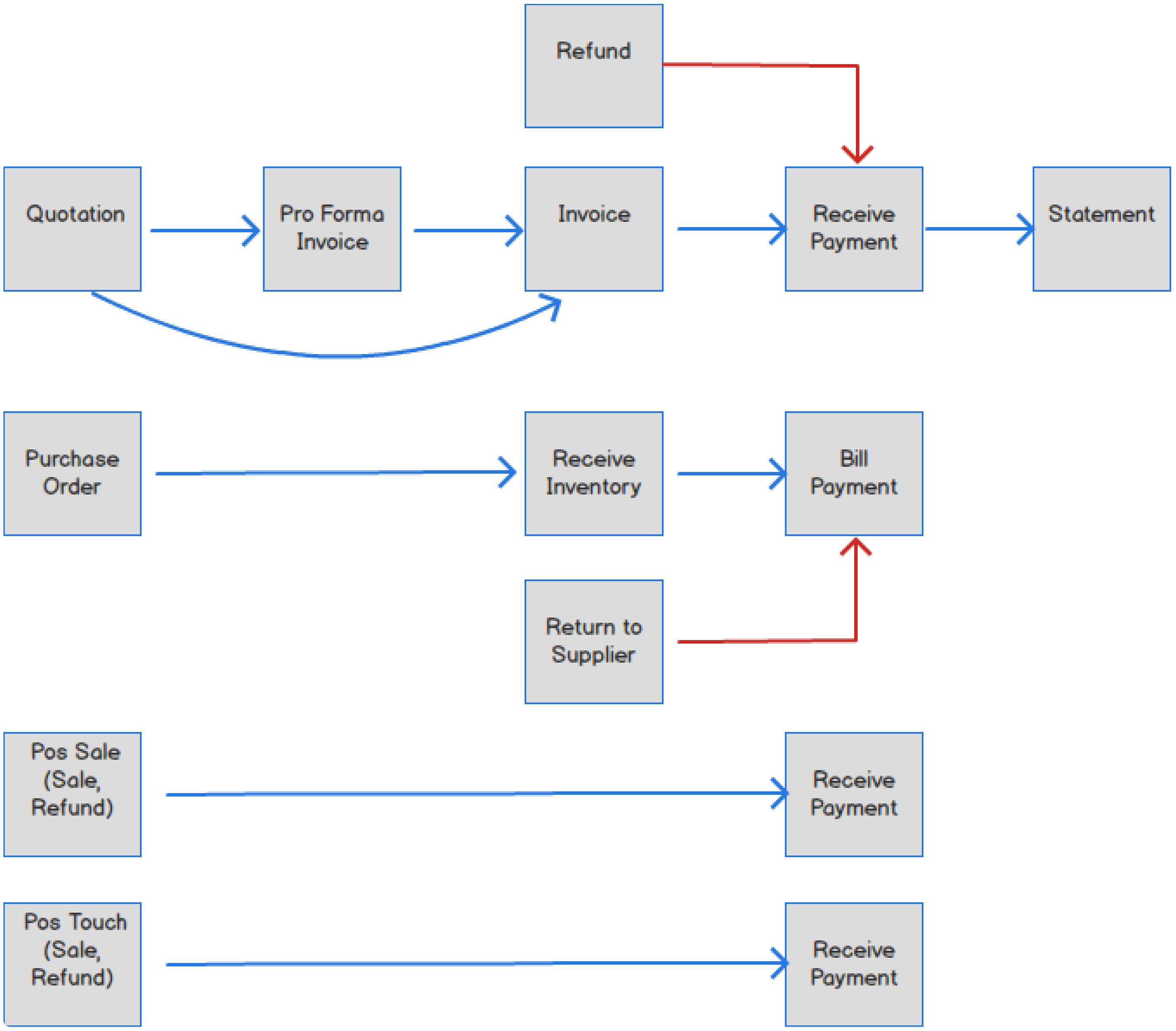
1	Company Name
2	Login. It displays the device’s till number
3	Exit BLUETILL
4	Training. Selects training mode using sample database (it doesn’t affect the company’s data).
5	Clear entered password

> Training mode denies access to the system preferences and denies use of the EFTPOS terminal.

5.2. Workflow

This provides more accurate information in your list monitoring to identify where, when and if your work processes require attention.


Refund
Quotation
Pro Forma Invoice
Invoice
Receive Payment
Statement
Purchase Order
Receive Inventory
Bill Payment
Return to Supplier
Pos Sale (Sale, Refund)
Receive Payment
Pos Touch (Sale, Refund)
Receive Payment

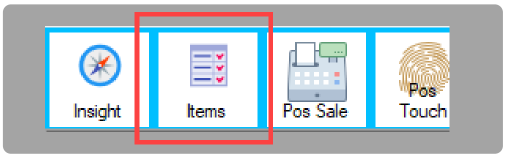
5.3. Add Basic Items

Basic items are individual inventory items sold without multiple options or variations, such as modifiers or kitchen printer connections.

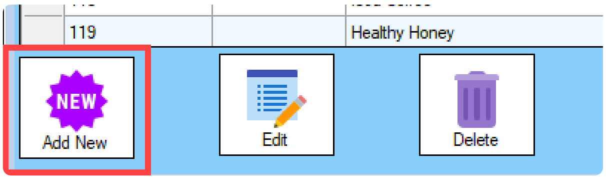
Create a Basic Item

Enter details such as item name, category, supplier (vendor), retail price, wholesale price and cost price of inventory item.

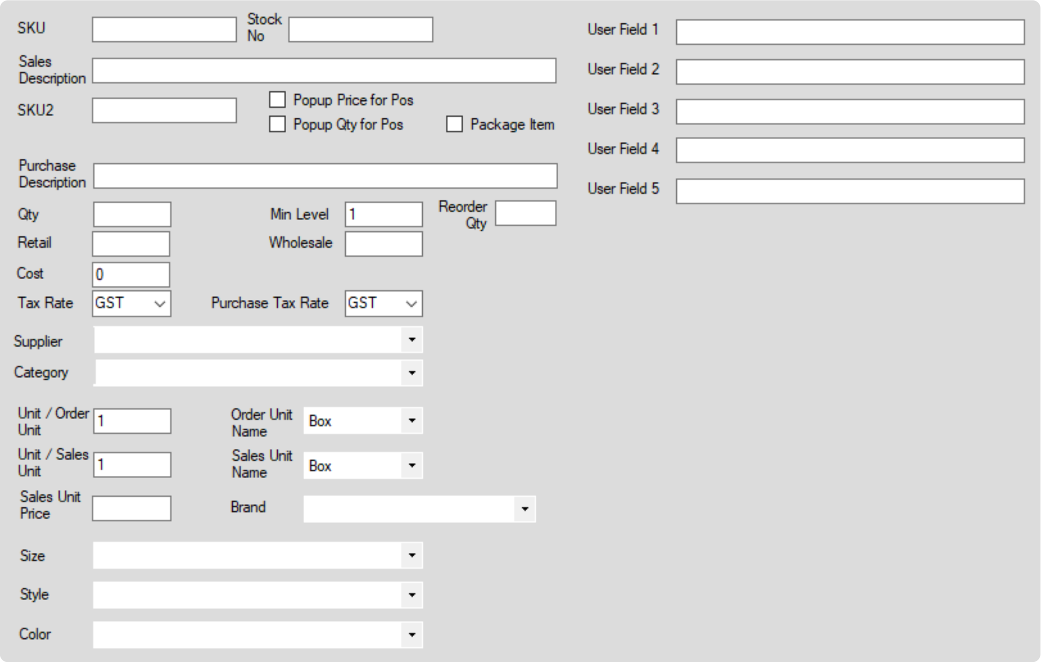
1. Open Stock (Items) Screen.


Insight
Items
Pos Sale
Pos Touch

2. Click ‘Add New’.


119
Healthy Honey
NEW
Add New
Edit
Delete

3. Fill in item details.


SKU
Stock No
Sales Description
SKU2
Purchase Description
Qty
Retail
Wholesale
Reorder Qty
Supplier
Category
Sales Unit Price
Brand
Size
Style
Color
User Field 1
User Field 2
User Field 3
User Field 4
User Field 5

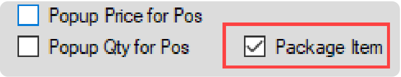
☐ Popup Price for Pos
☐ Popup Qty for Pos
☐ Package Item
Min Level 1
Cost 0
Tax Rate GST
Purchase Tax Rate GST
Unit / Order Unit 1
Order Unit Name Box
Unit / Sales Unit 1
Sales Unit Name Box

SKU	Unique identifier created for each item and used to generate barcodes.
Stock No	Item reference. You can use this field as the vendor’s (supplier’s) item code as sometimes vendors use their own code rather than a barcode and you will need it to order the item.
Sales Description	What cashiers see at the register and what prints on receipts. Cashiers can search for items by Name on the Sales screen.

Pop Up Price for Pos	If you choose this option, a popup screen will show whenever you select the item in the Sales screen prompting you to enter a price.
Pop Up Qty for Pos	If you choose this option, a popup screen will show whenever you select the item in the Sales screen prompting you to enter a quantity.
Package	If you choose this option, you can setup a package item which includes several items each with individual quantities. Whenever you select a package item, linked items will be displayed on the Sales screen and their individual quantities will decrease from the inventory after you complete a sale.
SKU2	2nd unique identifier for the item. If you setup an item with SKU = 100 and SKU2 = 101, whenever you scan/type 100 or 101 in the search bar, item will be selected and displayed.
Purchase Description	You can use this field if you want to use a different description when you order from a vendor (supplier).
Retail	The amount the item sells for to a retail customer.
Wholesale	The amount the item sells for to a wholesale customer.
Cost	The amount that has to be paid for the business to acquire an individual item.
Unit / Order Unit	The quantity amount that will increase whenever you buy the item as ‘Order Unit’. Eg. If you set up order unit qty as 12 and buy 1 item as order unit, total stock quantity for that item will be increased by 12.
Order Unit Name	The name of the order unit. The default name is ‘Box’.
Unit / Sales Unit	The quantity amount that will decrease whenever you sell the item as ‘Sales Unit’. Eg. If you set up sales unit qty as 12 and sell 1 item as sales unit, total stock quantity for that item will be decreased by 12.
Sales Unit Name	The name of the sales unit. The default name is ‘Box’.
Sales Unit Price	The amount the item sells for when sold as a sales unit.
Brand	Brand of the item. You can use brand instead of supplier when you search. Most users use brand instead of supplier when they want to hide the vendor’s (supplier’s) name from staff.
User Field	Users can setup their own data field for items for any purpose. For example, you can use this field to describe the item’s location in the warehouse.

4. Add a Package Item

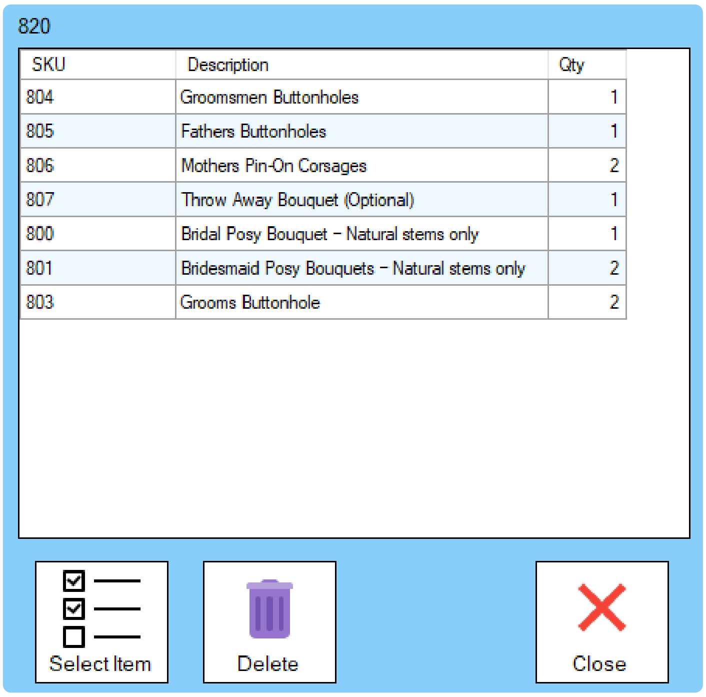
Step 1 : Select the ‘Package Item’ check box.



☐ Popup Price for Pos
☐ Popup Qty for Pos
☑ Package Item

Step 2 : Click the ‘Package’ button at the bottom of the screen.

Step 3 : Click the ‘Select Items’ button then select the items that you want to include in this package.


820

SKU	Description	Qty
804	Groomsmen Buttonholes	1
805	Fathers Buttonholes	1
806	Mothers Pin-On Corsages	2
807	Throw Away Bouquet (Optional)	1
800	Bridal Posy Bouquet – Natural stems only	1
801	Bridesmaid Posy Bouquets – Natural stems only	2
803	Grooms Buttonhole	2

Step 4 : Double click the ‘Qty’ column to change the qty.

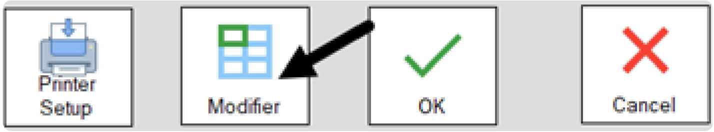
Step 5: Click the ‘Close’ button (when you close the screen, the selected package items will be saved automatically).

Step 6 : Click ‘Save’ on the item edit screen.

5.4. Add Items with Variants

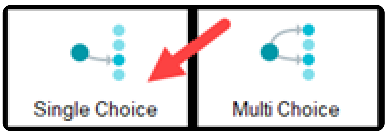
Modifiers can be added to basic items to add multiple variants to a single item such as drinks with different cup sizes.
Modifiers can be single choice or multiple choice which allow customers to personalize their order.
With Modifiers, a customer can select how they'd like their burger cooked, which additions (i.e. extra bacon) they'd like, and if they'd prefer not having an ingredient (i.e. the bun) due to allergies or personal preference.

Open Modifier screen on item edit screen

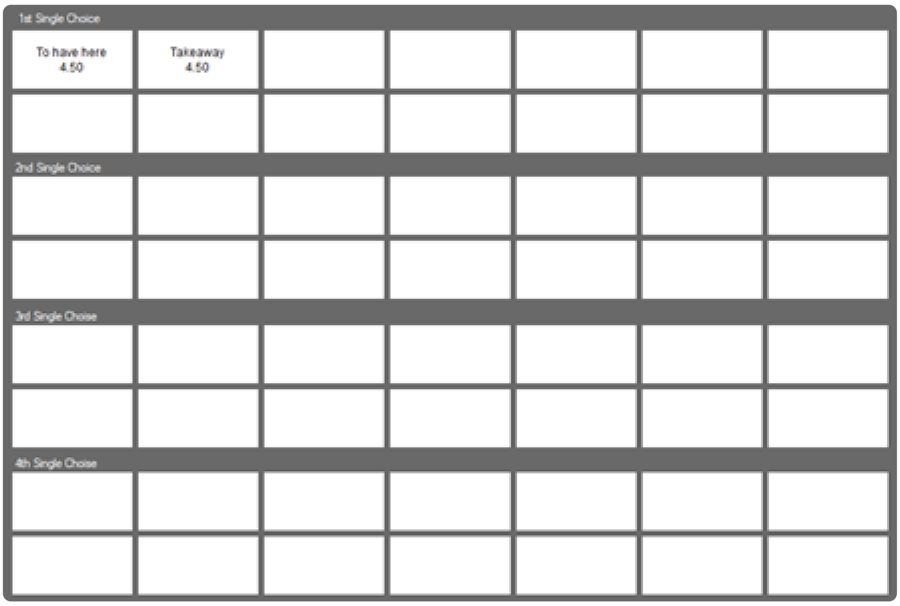

Printer Setup
Modifier
OK
Cancel

Single Choice Modifiers

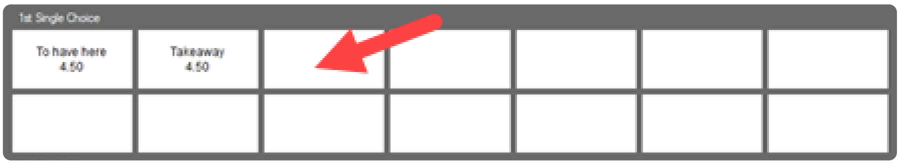
Single choice modifiers allow customers to make just one selection from a group of several potential choices. For example, choosing between mild, spicy, or extra spicy salsa with an order of chips.


Single Choice
Multi Choice

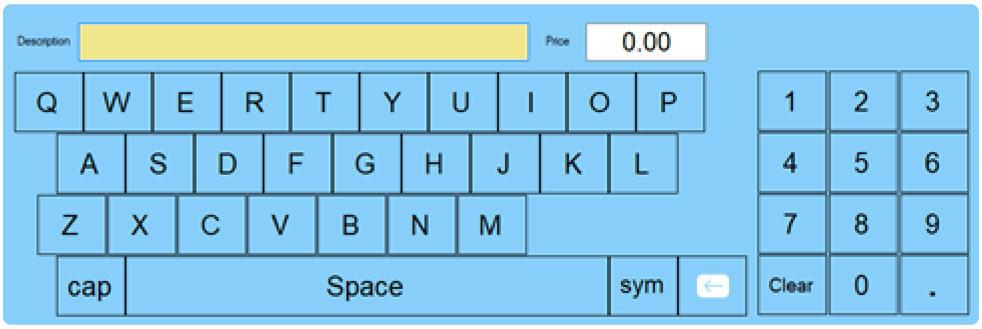
Add Modifiers to an Item
You can setup 4 different single choice modifiers. Each selection has 14 potential choices.


1st Single Choice
To have here 4.50
Takeaway 4.50
2nd Single Choice
3rd Single Choise
4th Single Choise

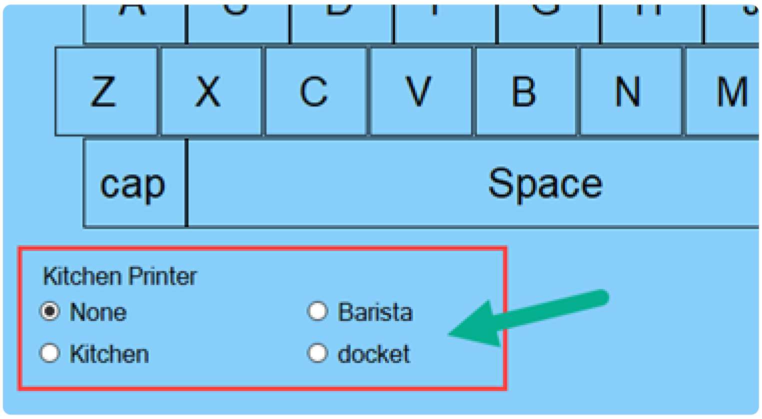
1. Click the modifier button.


1st Single Choice
To have here 4.50
Takeaway 4.50

2. Enter a name and an optional price. Optional price increases the item's sales price when that option is selected at the register.


Description
Price
0.00
Q W E R T Y U I O P
A S D F G H J K L
Z X C V B N M
cap
Space
sym
1 2 3
4 5 6
7 8 9
Clear
0
.

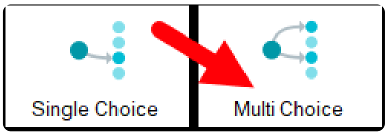
3. Select an optional kitchen printer.


Z X C V B N M
cap
Space

Kitchen Printer
● None ○ Barista
○ Kitchen ○ docket

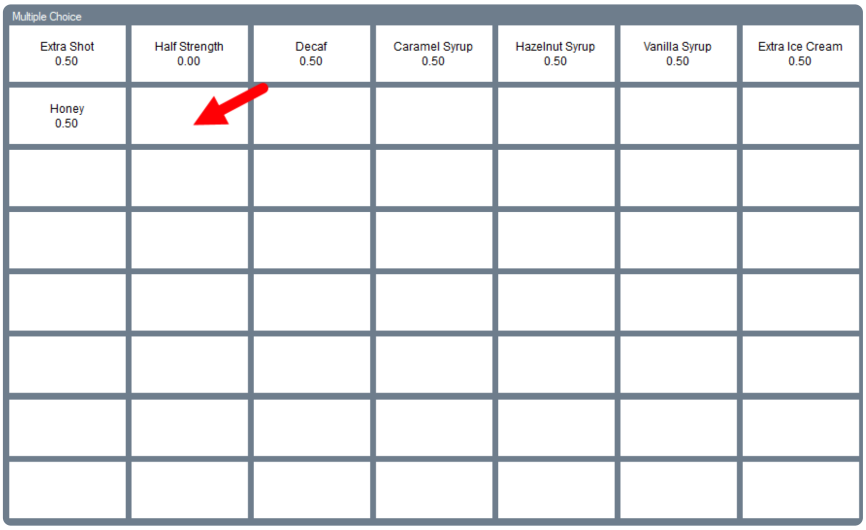
Multiple Choice Modifiers

If you run a cafe or restaurant, some items can have extra additions or options that can be added to the item. Clicking on the 'Multiple Choice' button will open another screen to choose for multiple choice modifiers of which any number of options can be selected.


Single Choice
Multi Choice

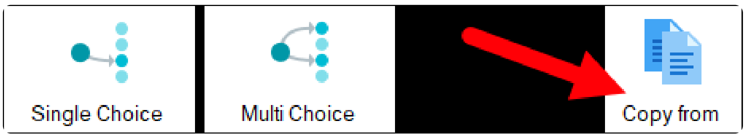
Add Modifiers to an Item

You can setup up to 56 different options. Adding a multiple choice modifier is the same as single choice.

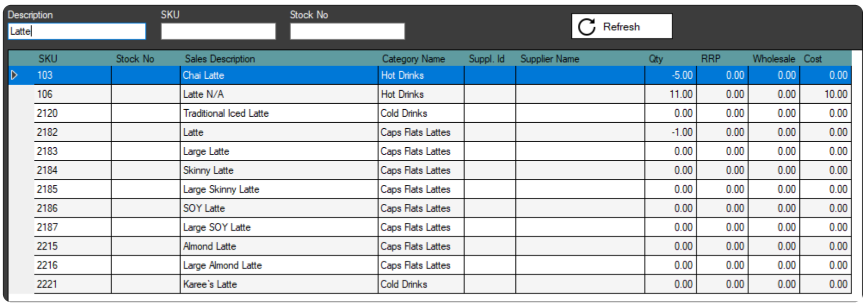

Multiple Choice
Extra Shot 0.50
Half Strength 0.00
Decaf 0.50
Caramel Syrup 0.50
Hazelnut Syrup 0.50
Vanilla Syrup 0.50
Extra Ice Cream 0.50
Honey 0.50

Copy Modifiers from an Item

For items that would use the same modifiers, you can copy the modifiers from an existing item over to other items. This allows you to avoid reentering modifiers one by one.


Single Choice
Multi Choice
Copy from

1. Click the 'Copy From' button to search for an item to copy modifiers from.



Description: Latte
SKU:
Stock No:

SKU	Stock No	Sales Description	Category Name	Suppl. Id	Supplier Name	Qty	RRP	Wholesale	Cost
103		Chai Latte	Hot Drinks			-5.00	0.00	0.00	0.00
106		Latte N/A	Hot Drinks			11.00	0.00	0.00	10.00
2120		Traditional Iced Latte	Cold Drinks			0.00	0.00	0.00	0.00
2182		Latte	Caps Flats Lattes			-1.00	0.00	0.00	0.00
2183		Large Latte	Caps Flats Lattes			0.00	0.00	0.00	0.00
2184		Skinny Latte	Caps Flats Lattes			0.00	0.00	0.00	0.00
2185		Large Skinny Latte	Caps Flats Lattes			0.00	0.00	0.00	0.00
2186		SOY Latte	Caps Flats Lattes			0.00	0.00	0.00	0.00
2187		Large SOY Latte	Caps Flats Lattes			0.00	0.00	0.00	0.00
2215		Almond Latte	Caps Flats Lattes			0.00	0.00	0.00	0.00
2216		Large Almond Latte	Caps Flats Lattes			0.00	0.00	0.00	0.00
2221		Karee's Latte	Cold Drinks			0.00	0.00	0.00	0.00

5.5. Register Button Layout

The Pos touchscreen button layout is the layout of screen buttons that cashiers use to ring up inventory items. Learn how to navigate and add items to the layout.
Click Here for instruction

5.6. Opening & Closing Your Shift

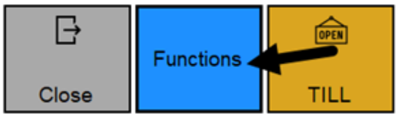
Open and close shifts to maintain accurate reporting and make it easier to balance your cash drawer each day.

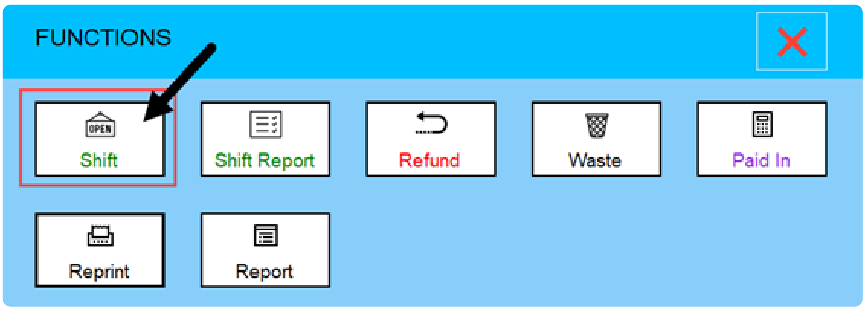
Open Shift

One of the first steps to starting your day is to open a shift. The shift must be open before cashiers can run any transactions at the register.

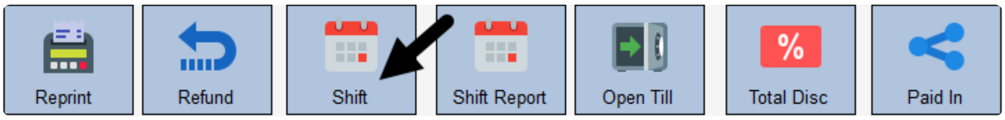
1. Open BLUETILL and login.
2. Open the Pos Sale or Pos Touch screen (may require another login).
2.5. Pos Touch only: Click the 'Functions' button at the bottom of the screen.
3. Click the 'Shift' button.

Pos Touch

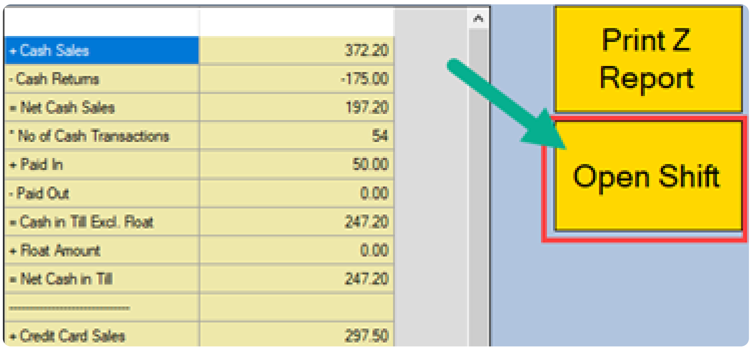

Close
Functions
OPEN
TILL


FUNCTIONS
Shift
Shift Report
Refund
Waste
Paid In
Reprint
Report

Pos Sale


Reprint
Refund
Shift
Shift Report
Open Till
Total Disc
Paid In

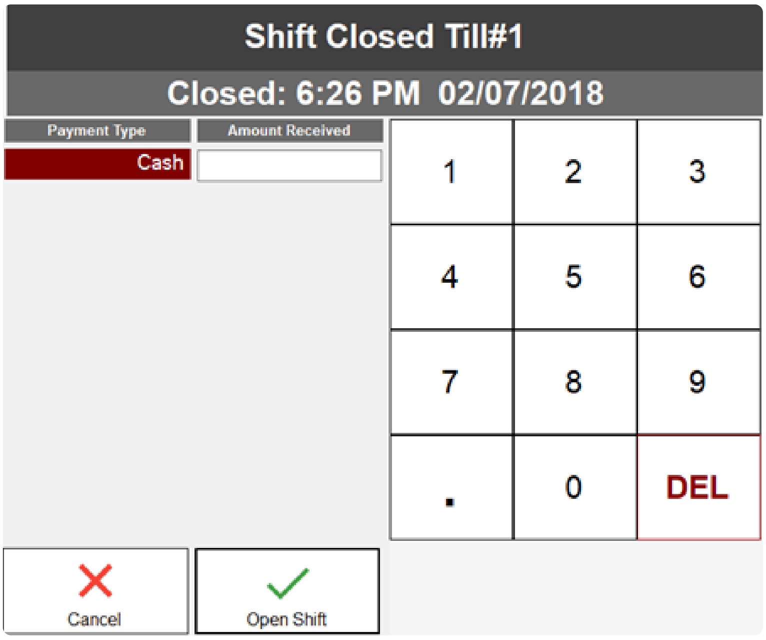
4. Click 'Open Shift'.


Print Z Report
Open Shift

+ Cash Sales	372.20
- Cash Returns	-175.00
= Net Cash Sales	197.20
" No of Cash Transactions	54
+ Paid In	50.00
- Paid Out	0.00
= Cash in Till Excl. Float	247.20
+ Float Amount	0.00
= Net Cash in Till	247.20

+ Credit Card Sales	297.50

5. Enter the starting cash amount in the till.



Shift Closed Till#1

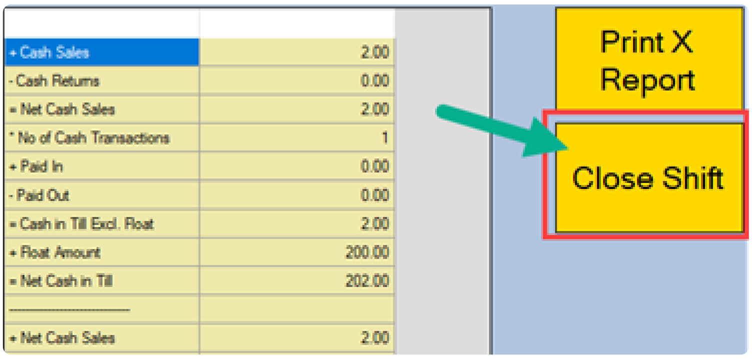
Closed: 6:26 PM 02/07/2018

Payment Type	Amount Received
Cash	

Close Shift

When your business closes each day, close the shift in BLUETILL to end your day. After the shift is closed, cashiers cannot run anymore transactions.

1. Click ‘Close Shift’.



+ Cash Sales	2.00
- Cash Returns	0.00
= Net Cash Sales	2.00
* No of Cash Transactions	1
+ Paid In	0.00
- Paid Out	0.00
= Cash in Till Excl. Float	2.00
+ Float Amount	200.00
= Net Cash in Till	202.00

+ Net Cash Sales	2.00

> Once you open the Shift, the ‘Open Shift’ button will change to ‘Close Shift’.

2. Enter the total cash amount left in the drawer

3. Enter the total amount of each other payment method.

5.7. X and Z Reports

X and **Z** reports provide summaries of activity on a particular register during a shift. Both reports include opening/closing drawer amounts, sales/returns totals, and other shift details.

X Report – Mid Day / Mid Shift

The X report is a snapshot of shift details from the beginning of the shift up to the present on that specific register.

Z Report – End of Day / End of Shift

The Z report is a snapshot of what occurred from the beginning of the shift to the end of the shift on that specific register.

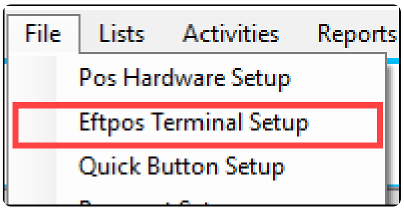
6. Setup

6.1. EFTPOS Terminal

Currently BLUETILL supports Tyro and Westpac Presto EFTPOS.

6.1.1. Westpac Presto

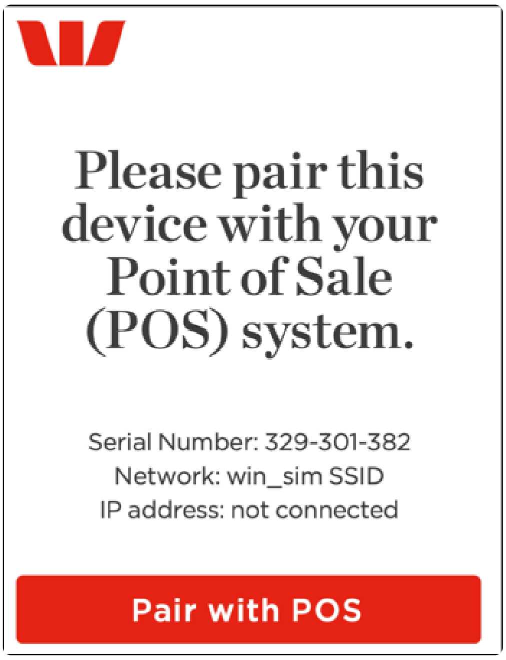
Select ‘EFTPOS Terminal Setup’ under the ‘File’ Tab


File
Lists
Activities
Reports
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup

You can download Presto Smart VX690 User Guide

Pairing Guide

Terminal



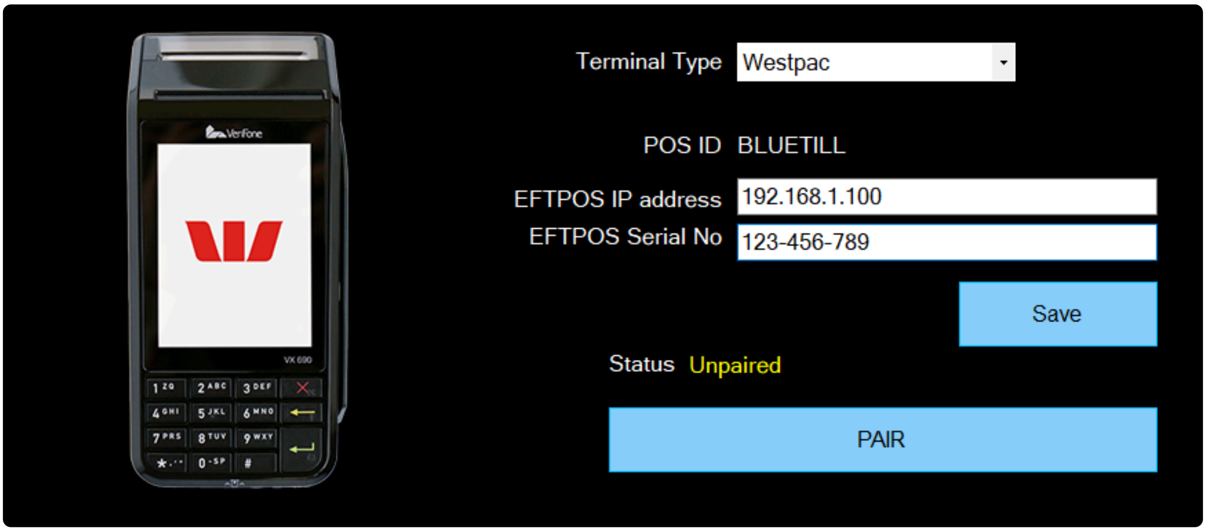
Please pair this device with your Point of Sale (POS) system.

Serial Number: 329-301-382
Network: win_sim SSID
IP address: not connected

Pair with POS

The terminal idle screen displays information such as the battery strength, connection strength, Serial Number, Network name, IP address, and the button to initiate Pairing the POS.
The payment application’s main menu/idle screen can be accessed via the key combo “ENTER+3”.

BlueTill



Terminal Type Westpac

POS ID BLUETILL

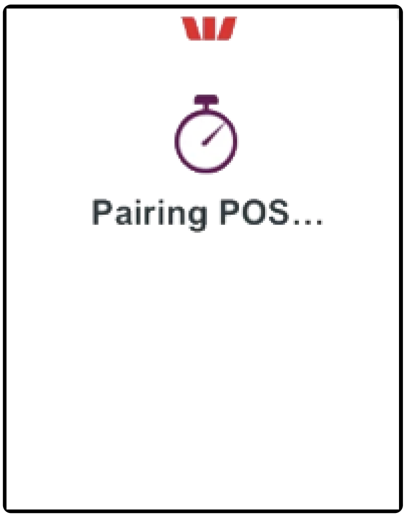
EFTPOS IP address 192.168.1.100

EFTPOS Serial No 123-456-789

Status Unpaired

1. Select Westpac for the Terminal Type.
2. Enter the EFTPOS IP address eg. 192.168.1.100.
3. Enter the EFTPOS Serial No.
4. Click the ‘Save’ button
5. Click the ‘PAIR’ button
6. Click Pair with POS on the EFTPOS Terminal that you are pairing with.

Pair Processing on Terminal



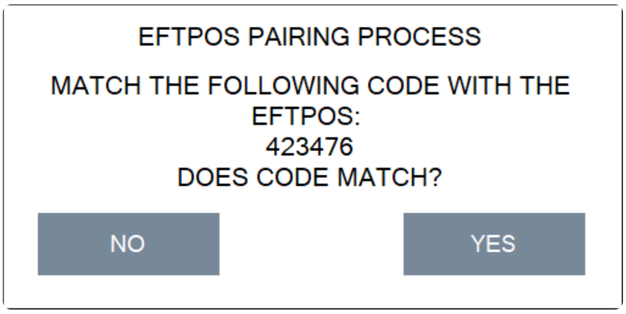
Pairing POS...

7. The terminal will now display a 6-digit secret key. This 6-digit secret key will also be displayed on the BlueTill screen.

Please ensure both POS and terminal is showing the same key to continue with the pairing.

Press “Yes” on the terminal screen to confirm the key.

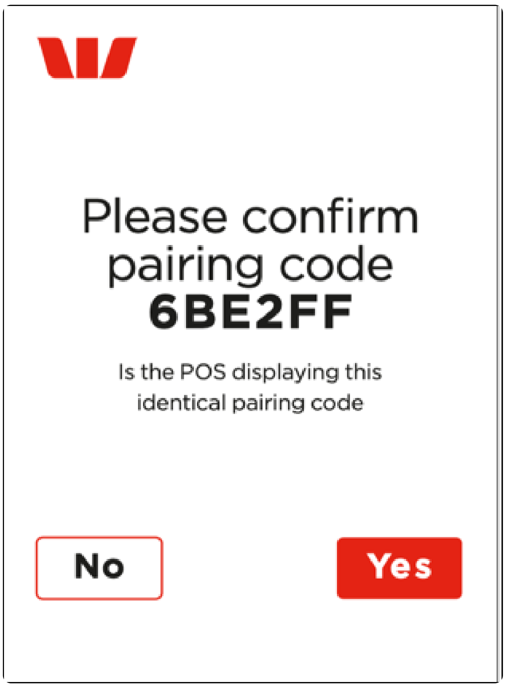
BlueTill



EFTPOS PAIRING PROCESS

MATCH THE FOLLOWING CODE WITH THE EFTPOS:
423476
DOES CODE MATCH?

Terminal



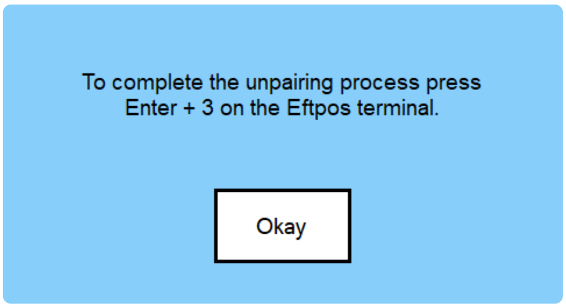
Please confirm pairing code
6BE2FF

Is the POS displaying this identical pairing code

✻ Note: You will only have 60 seconds to complete the pairing process before it times out.

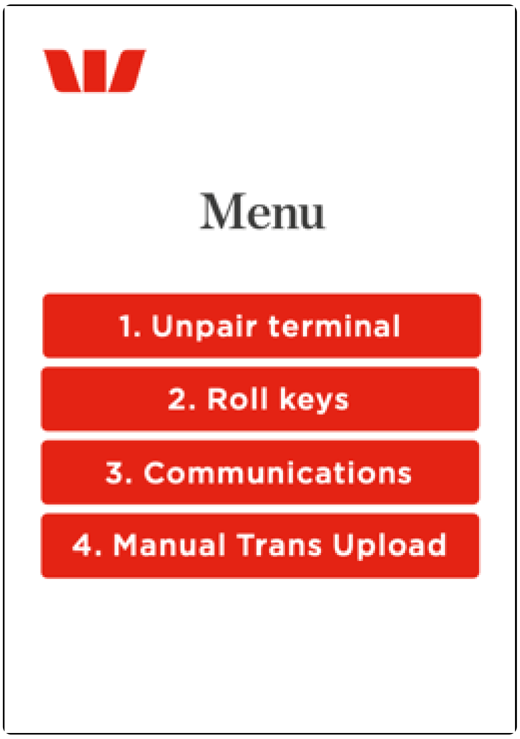
Unpairing Guide

1. Click the ‘UNPAIR’ button.



To complete the unpairing process press Enter + 3 on the Eftpos terminal.

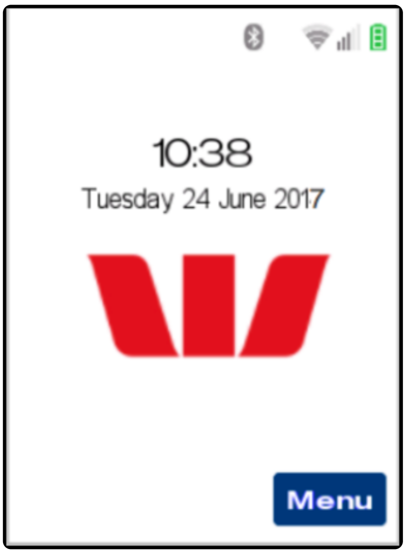
2. Terminal


Menu
1. Unpair terminal
2. Roll keys
3. Communications
4. Manual Trans Upload

Press “ENTER + 3” on the EFTPOS terminal to begin the unpairing process. Enter the Merchant password and press “Enter” then select “Unpair Terminal”. The terminal should show “Please pair device with your POS” to indicate it is unpaired.

Standalone Mode

Press “1 + ENTER” on the EFTPOS terminal on Pair with Pos screen


10:38
Tuesday 24 June 2017
Menu

You can enter the amount manually.

Back to Pair with Pos screen on Standalone Mode

Press “X” on the EFTPOS terminal

6.1.2. Tyro

Before you start

1. Tyro Terminal Adapter Software (TTA)

You need to install the Tyro Terminal Adapter Software (TTA). Click here for download or type the URL on the browser (tyro.com/tta).
This software needs to be installed and configured on each workstation that you wish to access the Tyro terminal.

2. Tyro Terminal

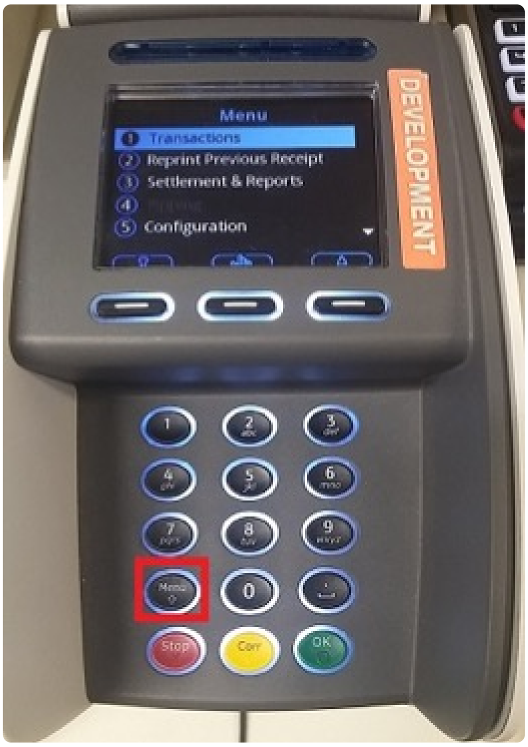
If this is the first time you are setting up Tyro, call Tyro Support on **1300 966 639** to activate the terminal. They will supply you with a Merchant ID and a Terminal ID.

Pairing the Tyro Terminal with your PC

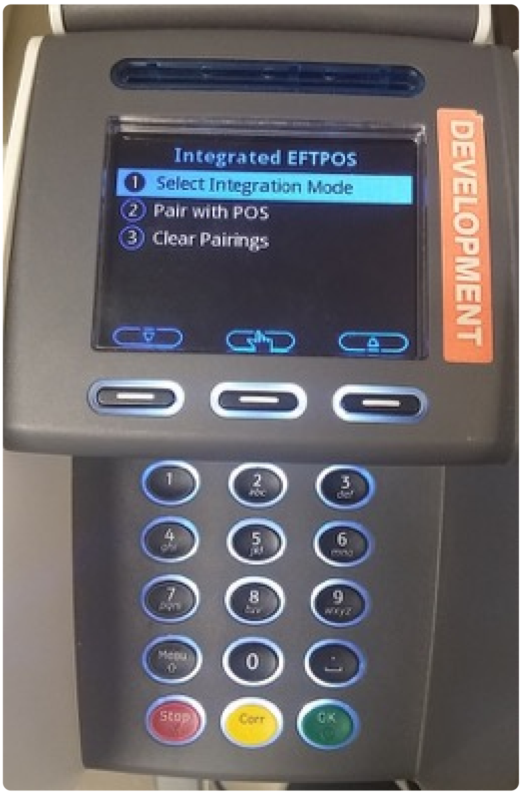
This process has to be repeated on each PC that you want to link to the Tyro terminal.

On the Tyro terminal

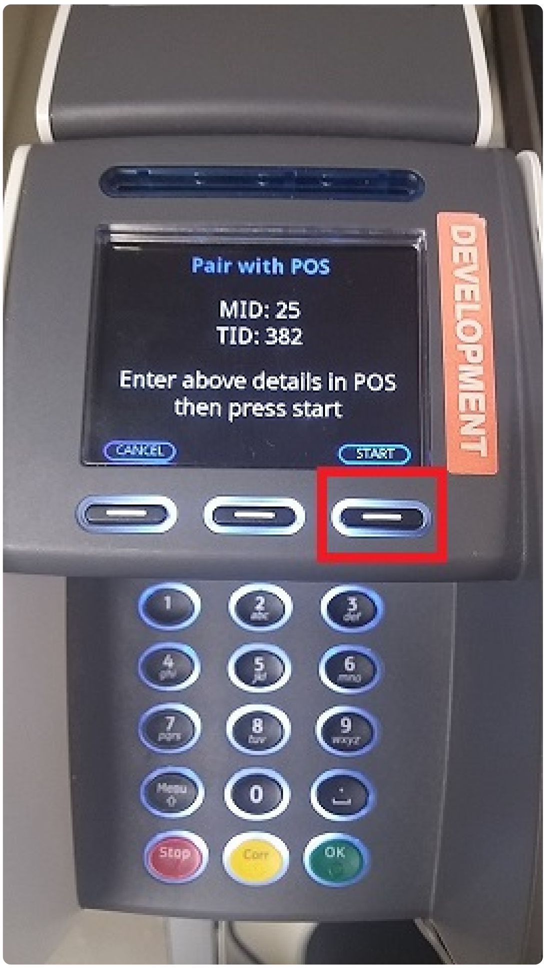
1. On the Tyro terminal, tap Menu, then Configuration


Menu
1 Transactions
2 Reprint Previous Receipt
3 Settlement & Reports
4
5 Configuration
DEVELOPMENT
Menu
0
Stop
Corr
OK

2. Select Integrated EFTPOS, then Pair with POS


Integrated EFTPOS
1 Select Integration Mode
2 Pair with POS
3 Clear Pairings
DEVELOPMENT
Stop
Corr
OK

3. On the Tyro Terminal, tap Pair (or Retry if you have already attempted to Pair)

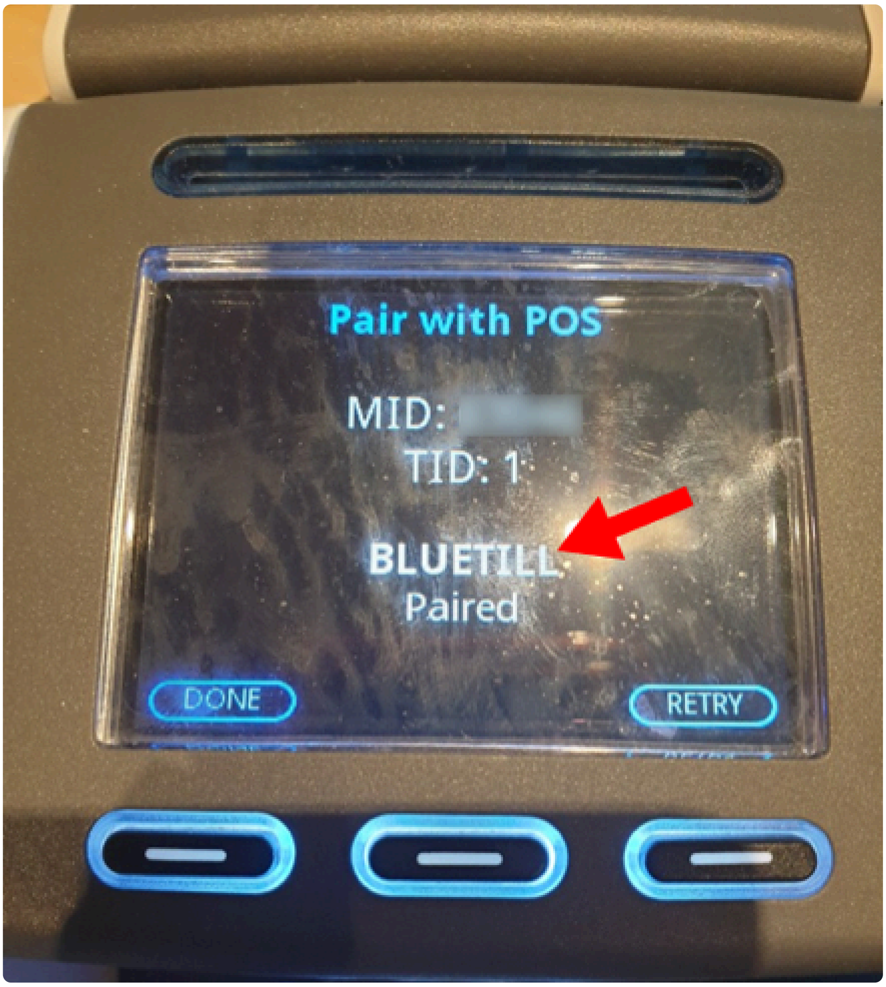

Pair with POS

MID: 25
TID: 382

Enter above details in POS then press start

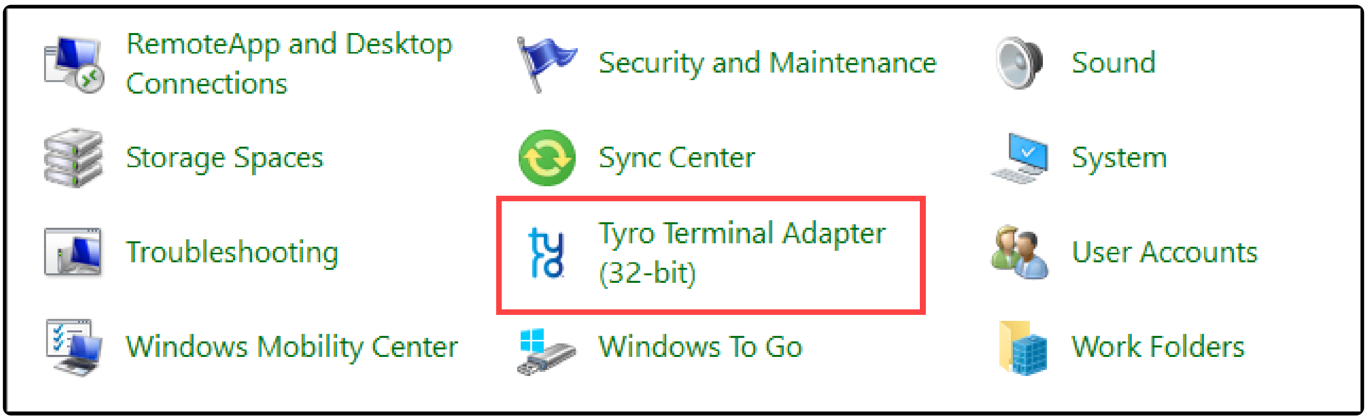
CANCEL
START
DEVELOPMENT
Stop
Corr
OK

4. After paired, you can see the following screen

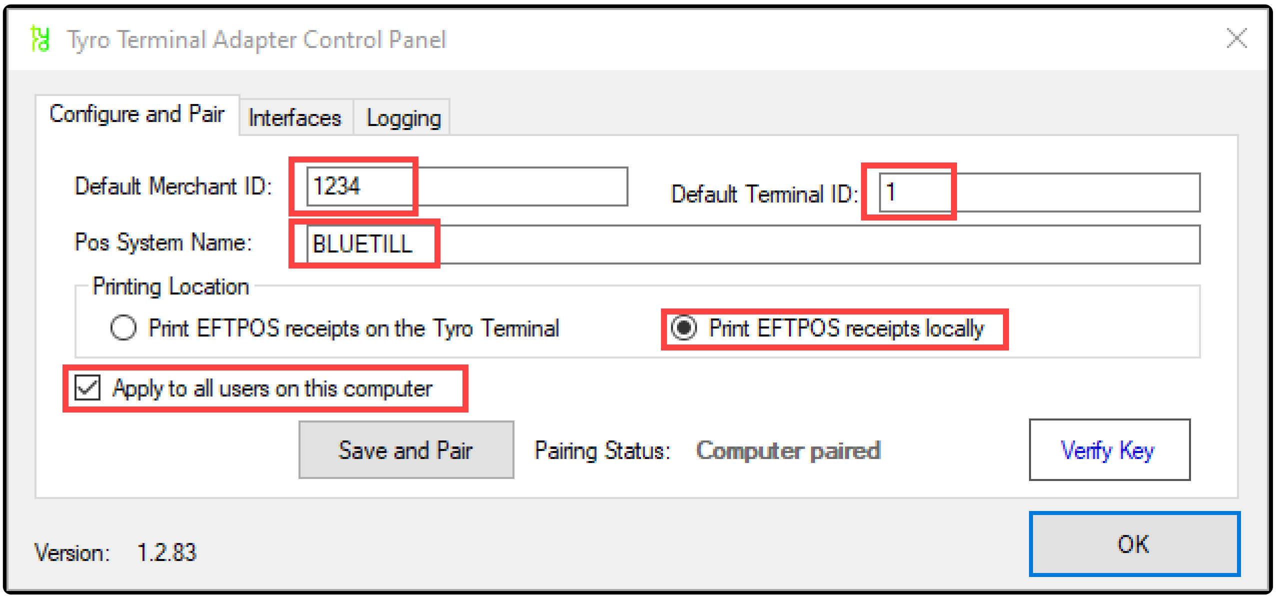

Pair with POS
MID: [redacted]
TID: 1
BLUETILL
Paired
DONE
RETRY

On the PC

1. Click the **Tyro Terminal Adapter** to load the Tyro Terminal Adapter configuration software on **Control Panel**


RemoteApp and Desktop Connections
Security and Maintenance
Sound
Storage Spaces
Sync Center
System
Troubleshooting
Tyro Terminal Adapter (32-bit)
User Accounts
Windows Mobility Center
Windows To Go
Work Folders

2. Fill the Merchant ID, Default Terminal ID and Pos System Name (BLUETILL).


Tyro Terminal Adapter Control Panel
Configure and Pair
Interfaces
Logging
Save and Pair
Verify Key
OK

Default Merchant ID: 1234

Default Terminal ID: 1

Pos System Name: BLUETILL

Printing Location

○ Print EFTPOS receipts on the Tyro Terminal

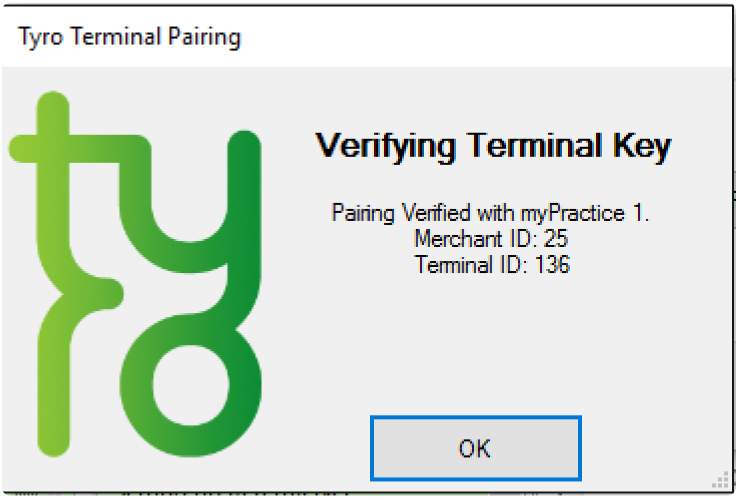
● Print EFTPOS receipts locally

☑ Apply to all users on this computer

Pairing Status: Computer paired

Version: 1.2.83

3. Click Save and Pair. If the pairing is successful it will return to the pairing screen. Confirm the pairing by clicking on Verify Key on the Tyro Terminal Adapter.

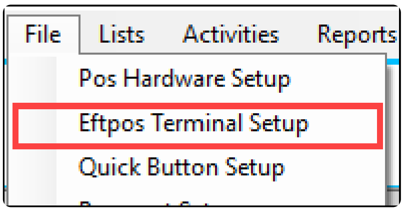

Tyro Terminal Pairing
OK

Verifying Terminal Key

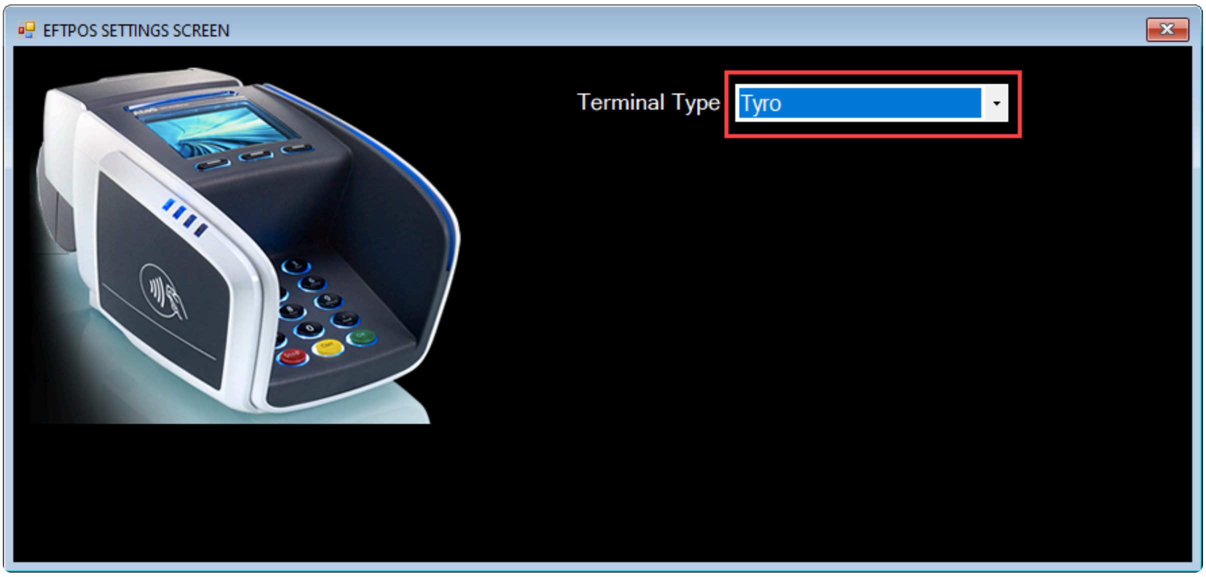
Pairing Verified with myPractice 1.
Merchant ID: 25
Terminal ID: 136

On BlueTill Point of Sale

1. Select ‘EFTPOS Terminal Setup’ under the ‘File’ Tab


File
Lists
Activities
Reports
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup

2. Select Terminal Type to Tyro

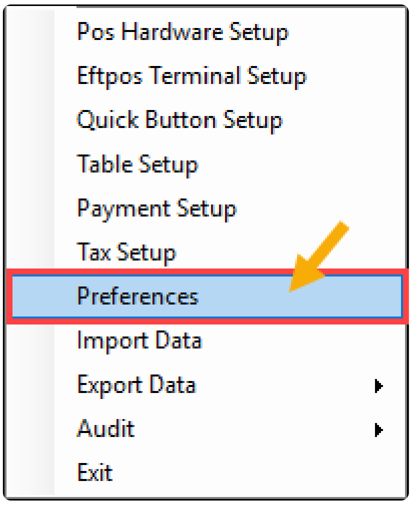


EFTPOS SETTINGS SCREEN

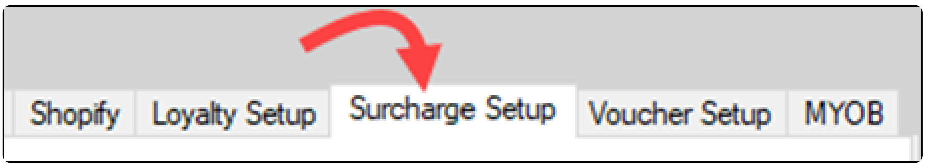
Terminal Type: Tyro

6.2. Surcharge

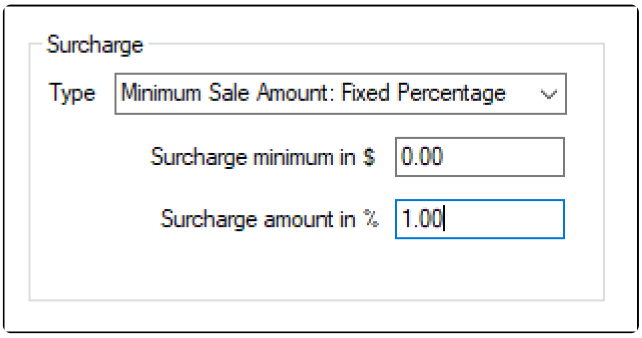
Open ‘Preferences’ under the ‘File’ tab.


Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Table Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Audit
Exit

Setup Surcharge Option


Shopify
Loyalty Setup
Surcharge Setup
Voucher Setup
MYOB

Choose Surcharge Type and Enter the percentage or amount


Surcharge

Type: Minimum Sale Amount: Fixed Percentage

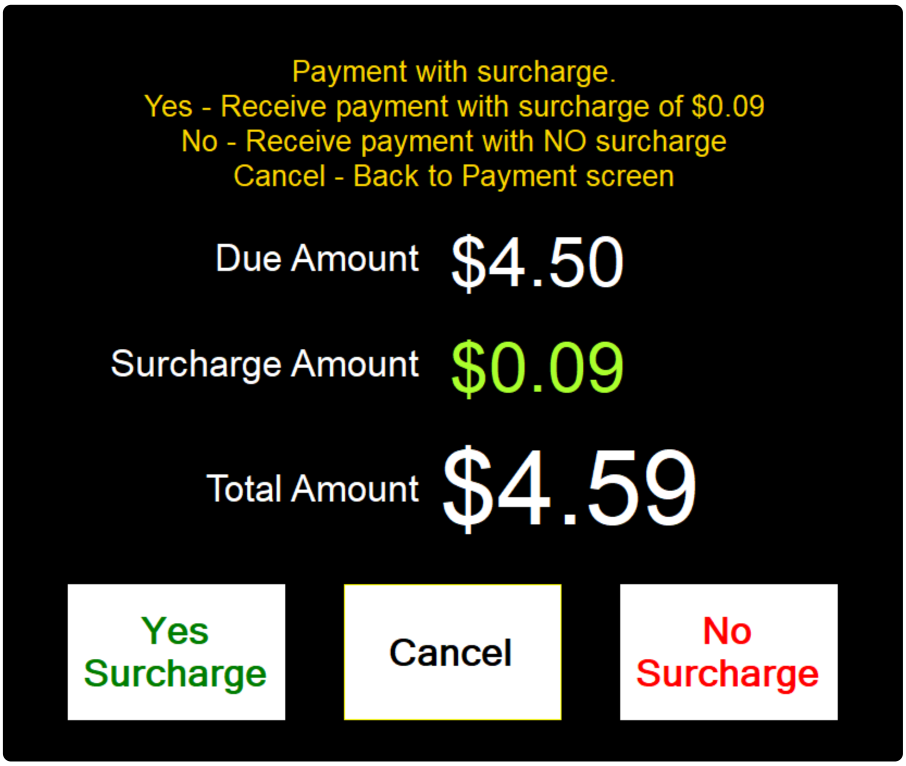
Surcharge minimum in $: 0.00

Surcharge amount in %: 1.00

Minimum Sale Amount: Fixed amount	The surcharge will be applied if card payment amount is under a specific amount. And surcharge amount is fixed like a 0.20 (20 cent).
Minimum Sale Amount: Fixed Percentage	The surcharge will be applied if card payment amount is under a specific amount. And surcharge amount is percentage of card amount. 1 means 1%.
Fixed Percentage	The surcharge will be applied to card payment amount with fixed a percentage. 1 means 1%.

Surcharge Applying Payment Screen

If the surcharge is activated, surcharge screen will be displayed on payment screen.



Payment with surcharge.
Yes - Receive payment with surcharge of $0.09
No - Receive payment with NO surcharge
Cancel - Back to Payment screen

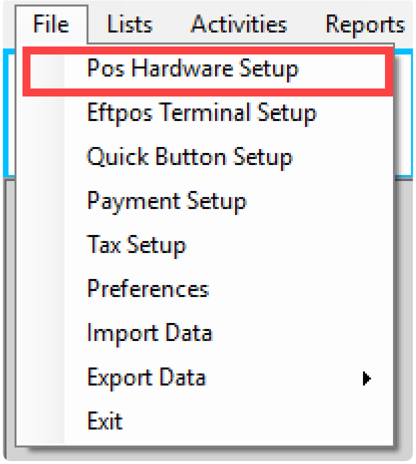
Due Amount $4.50

Surcharge Amount $0.09

Total Amount $4.59

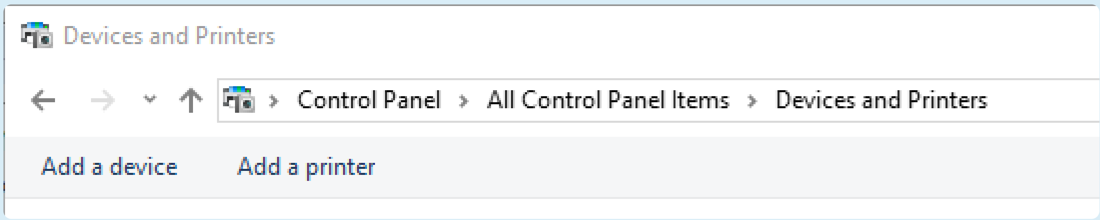
6.3. Receipt Printer

Open ‘Pos Hardware setup’ under the ‘File’ tab.

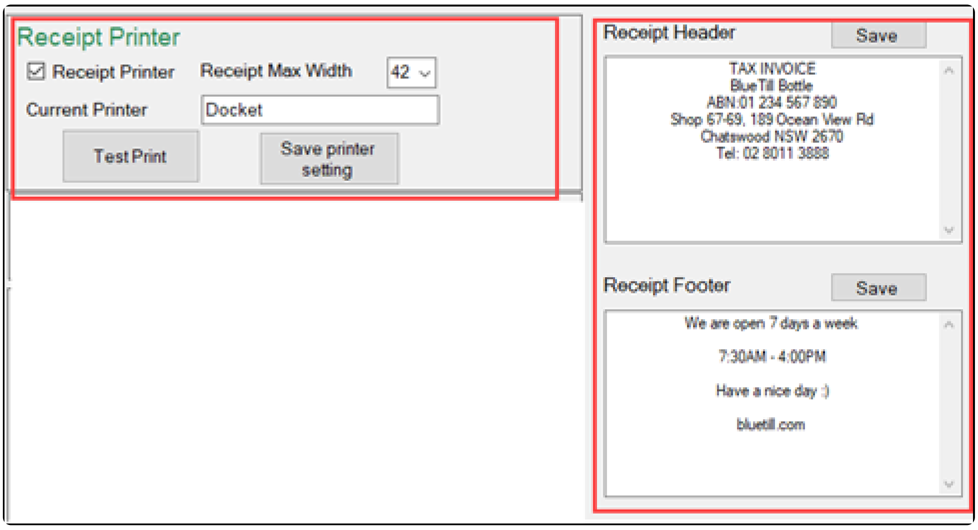

File
Lists
Activities
Reports
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Exit

Setting up your receipt printer for a Windows PC

If the printer connection type is USB, you need to download and install the printer driver. After that, you can check the receipt printer settings in Control Panel > Devices and Printers


Devices and Printers
Control Panel > All Control Panel Items > Devices and Printers
Add a device
Add a printer

1. Tick the ‘Receipt printer’ check box.
2. Type the printer name in the text box.
3. Setup the Header and Footer.
3. Click the ‘Test Print’ button. If it prints successfully, click the ‘Save printer setting’ button and the ‘Header’ and ‘Footer’ ‘Save’ buttons.



Receipt Printer

☑ Receipt Printer

Receipt Max Width: 42

Current Printer: Docket

Test Print
Save printer setting

Receipt Header

Save

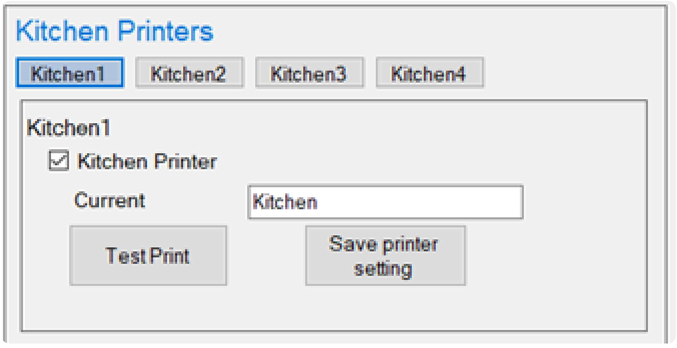
TAX INVOICE
BlueTill Bottle
ABN:01 234 567 890
Shop 67-69, 189 Ocean View Rd
Chatswood NSW 2670
Tel: 02 8011 3888

Receipt Footer

Save

We are open 7 days a week
7:30AM - 4:00PM
Have a nice day :)
bluetill.com

6.4. Kitchen Printer


Kitchen Printers
Kitchen1
Kitchen2
Kitchen3
Kitchen4
Test Print
Save printer setting

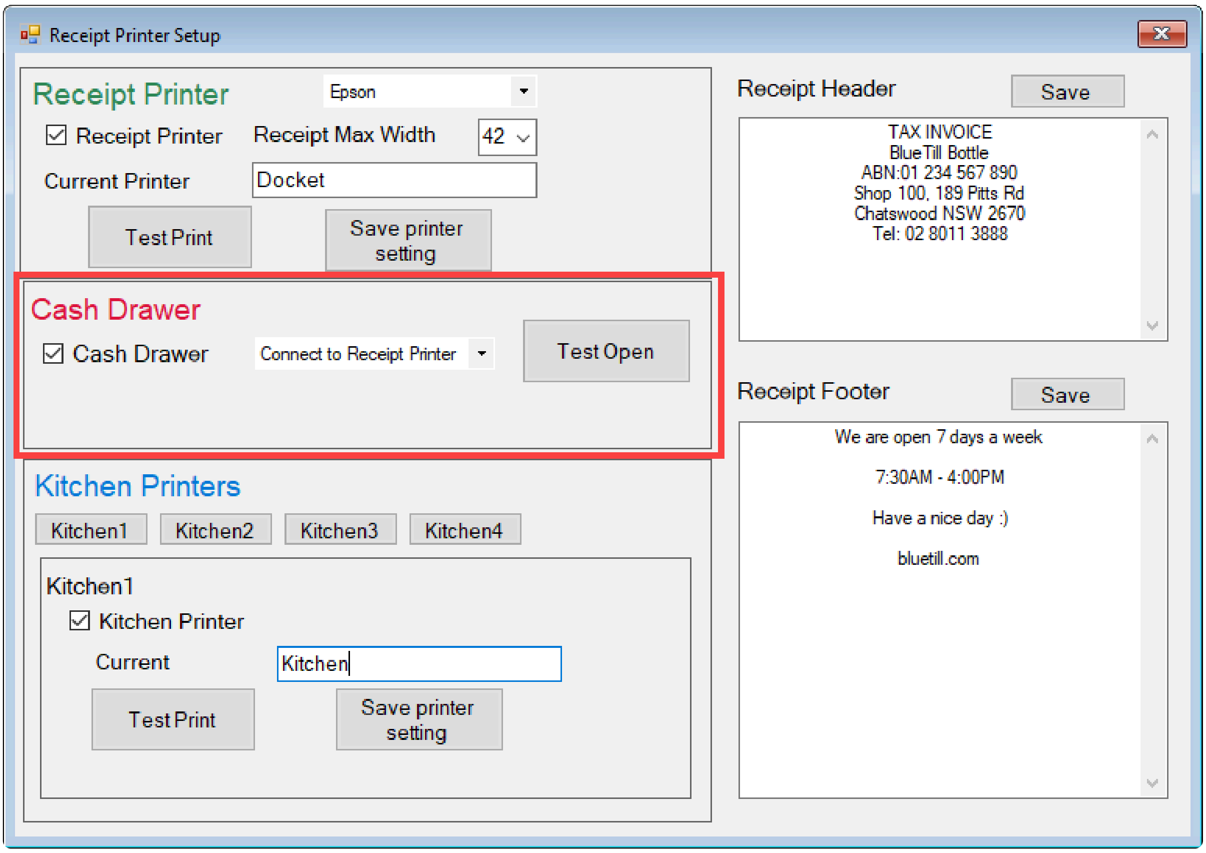
Kitchen1

☑ Kitchen Printer

Current: Kitchen

6.5. Cash Drawer

Connect to Receipt Printer



Receipt Printer Setup
Receipt Printer
Test Print
Save printer setting
Cash Drawer
Test Open
Kitchen Printers
Kitchen1
Kitchen2
Kitchen3
Kitchen4
Test Print
Save printer setting
Receipt Header
Save
Receipt Footer
Save

Receipt Printer: Epson
☑ Receipt Printer
Receipt Max Width: 42
Current Printer: Docket

☑ Cash Drawer: Connect to Receipt Printer

Kitchen1
☑ Kitchen Printer
Current: Kitchen

Receipt Header:

TAX INVOICE
BlueTill Bottle
ABN:01 234 567 890
Shop 100, 189 Pitts Rd
Chatswood NSW 2670
Tel: 02 8011 3888

Receipt Footer:

We are open 7 days a week

7:30AM - 4:00PM

Have a nice day :)

bluetill.com

1. Plug the RJ12 connector cable (the one that looks similar to a phone line) from the cash drawer into the receipt printer.
2. Tick the Cash Drawer checkbox
3. Click the ‘Test Open’ button to check if it is working.

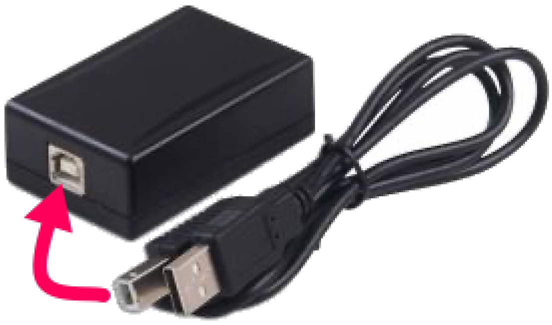
Connect to Serial Port

1. Prepare a Cash Drawer trigger.

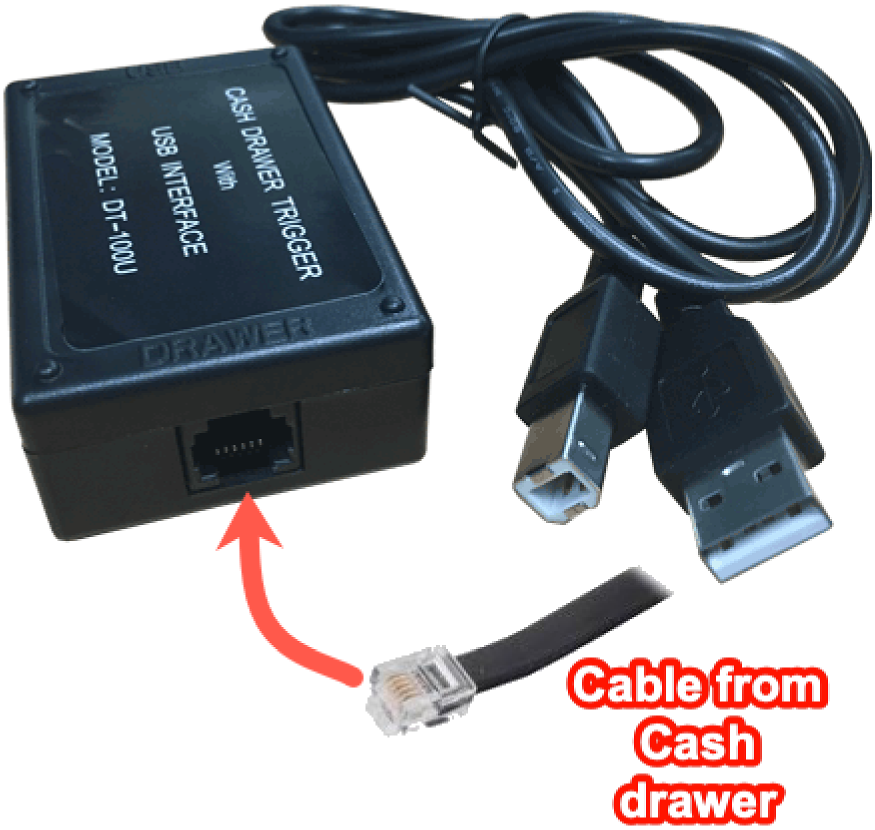
CASH DRAWER TRIGGER
With
USB INTERFACE
MODEL: DT-100U
DRAWER

2. Connect the trigger to computer

- One end of the Box has a USB-B port, plug the USB cable into that end

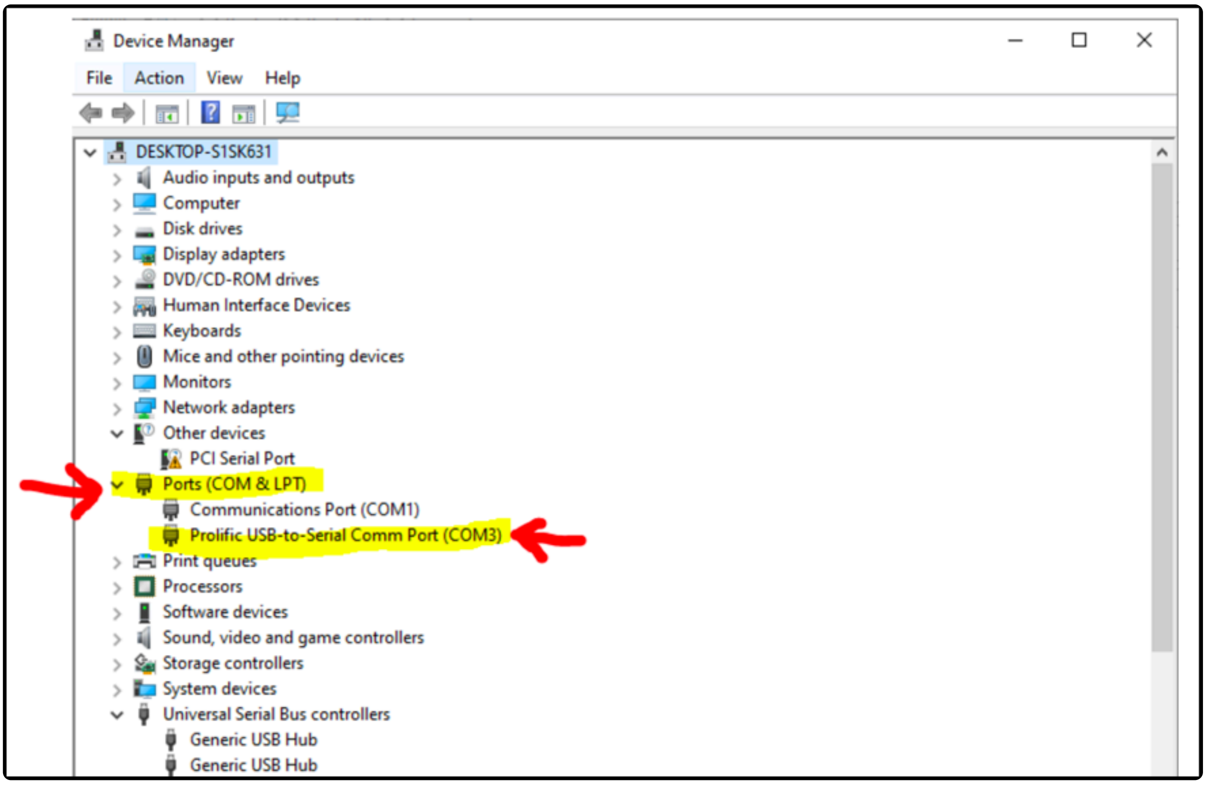


- The other end is a Standard USB-A connector. This plugs into one of the USB Ports on computer
- The Cable which comes from the Cash Drawer has the RJ12 connection. Which looks like a Phone cable. Plug that into the connection on the black box

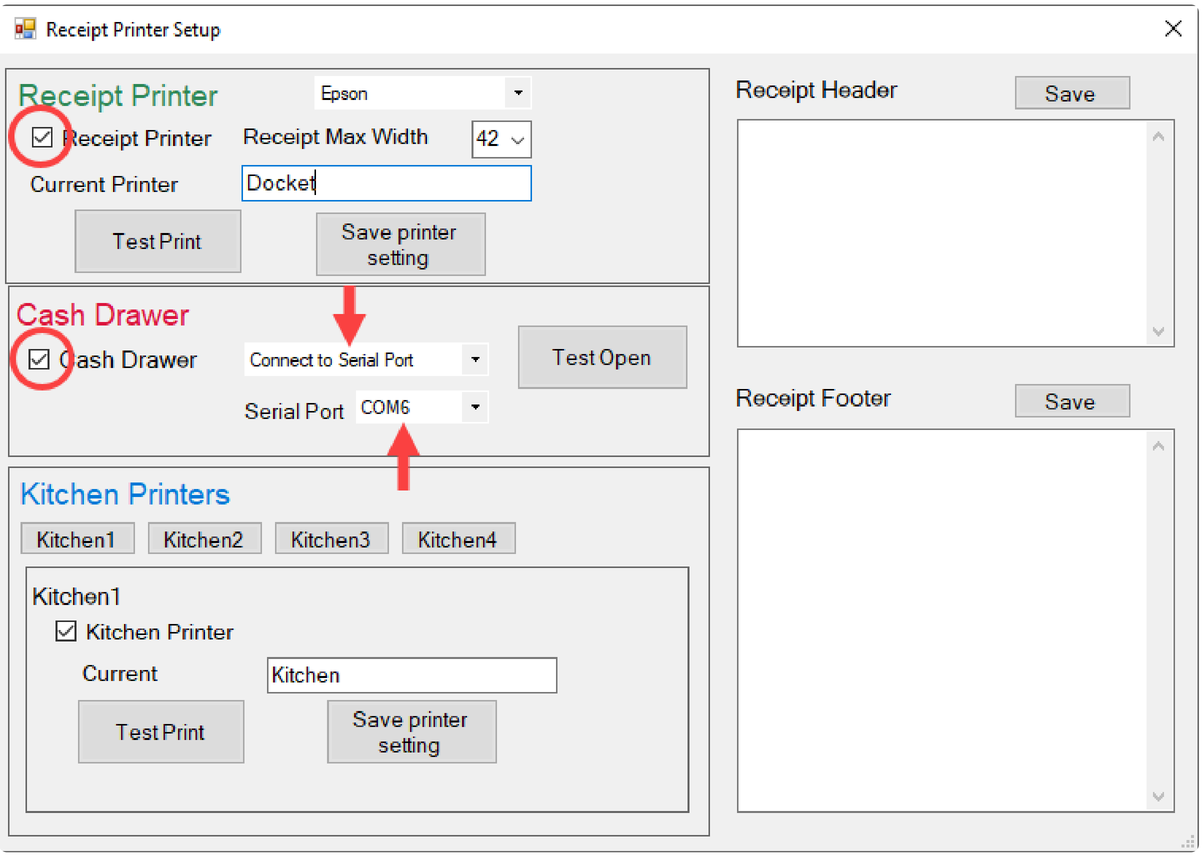

CASH DRAWER TRIGGER
With
USB INTERFACE
MODEL: DT-100U
DRAWER
Cable from Cash drawer

3. Check the Serial Port on Control Panel

- Go to CONTROL PANEL
- Click on DEVICE MANAGER
- Click on the PORTS (COM & LPT) as in below picture
- There should be one listed as “Prolific USB-to-Serial COMM Port” as highlighted below
- Note down what COM number is has in brackets. The below example is COM3


Device Manager
File
Action
View
Help
DESKTOP-S1SK631
Audio inputs and outputs
Computer
Disk drives
Display adapters
DVD/CD-ROM drives
Human Interface Devices
Keyboards
Mice and other pointing devices
Monitors
Network adapters
Other devices
PCI Serial Port
Ports (COM & LPT)
Communications Port (COM1)
Prolific USB-to-Serial Comm Port (COM3)
Print queues
Processors
Software devices
Sound, video and game controllers
Storage controllers
System devices
Universal Serial Bus controllers
Generic USB Hub
Generic USB Hub

4. Set up the cash drawer on screen


Receipt Printer Setup

Receipt Printer: Epson

☑ Receipt Printer

Receipt Max Width: 42

Current Printer: Docket

Cash Drawer

☑ Cash Drawer: Connect to Serial Port

Serial Port: COM6

Kitchen Printers

Kitchen1

☑ Kitchen Printer

Current: Kitchen

Test Print
Save printer setting
Test Open
Kitchen1
Kitchen2
Kitchen3
Kitchen4
Receipt Header
Save
Receipt Footer
Save

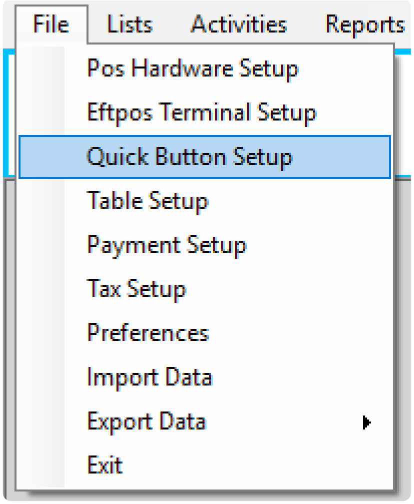
- Make Sure RECEIPT PRINTER box is UN-TICKED
- Make sure CASH DRAWER box is TICKED
- Make sure CONNECT TO SERIAL PORT is selected in the drop down field
- In the SERIAL PORT FIELD, select the COM Port which was displayed on the previous page in DEVICE MANAGER (our ex- ample was COM 3, yours will most likely be a different COM Port)

- Then press TEST OPEN, and the Cash Drawer will fire open

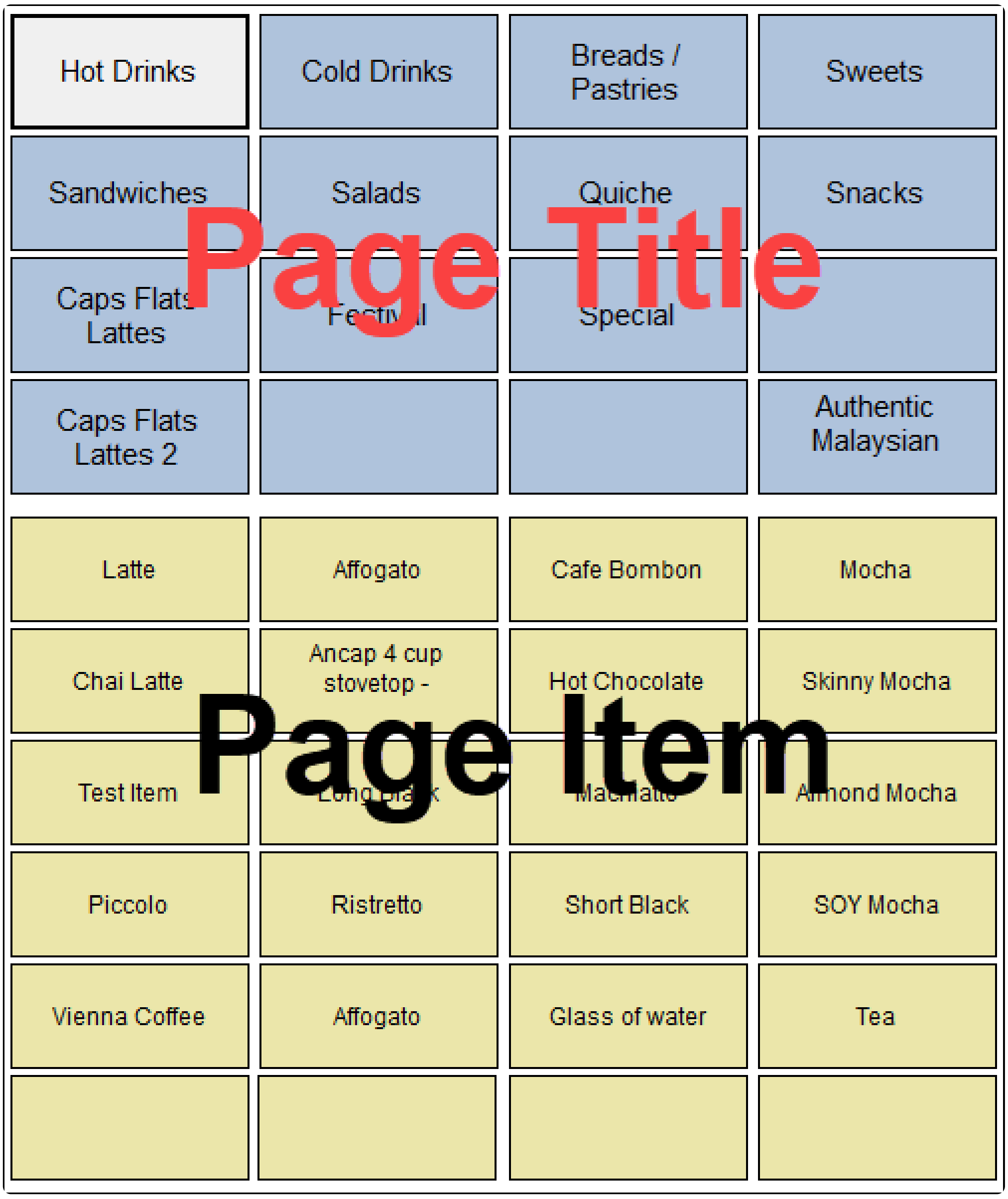
6.6. Register Button Layout

The Pos Touch screen button layout is the grouping of screen buttons that cashiers use to ring up inventory items. Learn how to navigate and add items to the layout.

Open 'Quick Button Setup' under the 'File' tab.

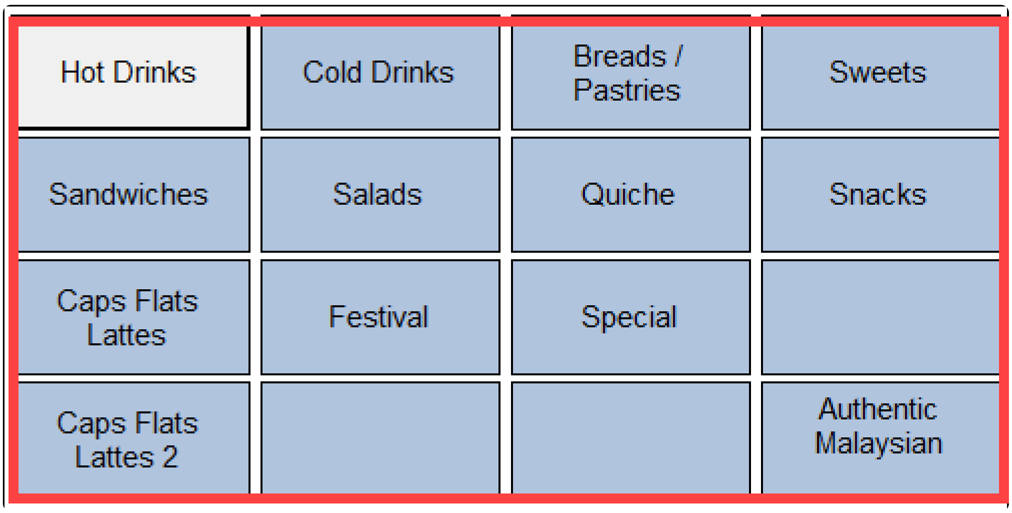

File
Lists
Activities
Reports
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Table Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Exit

You can set up 16 pages and each page can set up 24 items

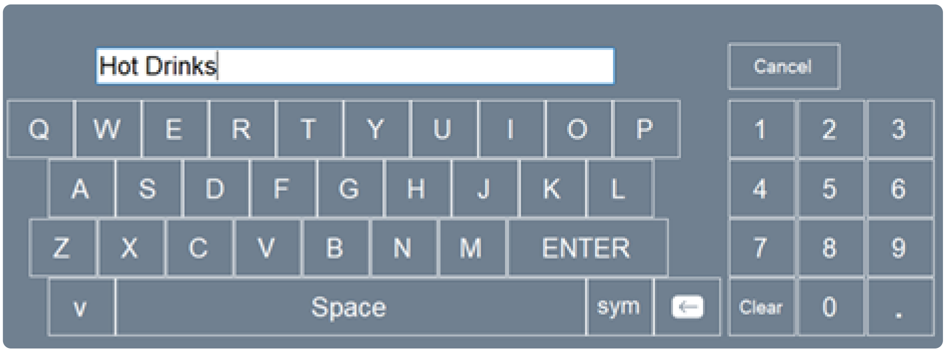

Hot Drinks
Cold Drinks
Breads / Pastries
Sweets
Sandwiches
Salads
Quiche
Snacks
Caps Flats Lattes
Festival
Special
Caps Flats Lattes 2
Authentic Malaysian
Page Title
Latte
Affogato
Cafe Bombon
Mocha
Chai Latte
Ancap 4 cup stovetop -
Hot Chocolate
Skinny Mocha
Test Item
Long Black
Macchiato
Almond Mocha
Piccolo
Ristretto
Short Black
SOY Mocha
Vienna Coffee
Affogato
Glass of water
Tea
Page Item

Add a Page

1. Click the page button (the blue buttons) to create a page (if a page has already been made for that button, clicking it once will select the page, and clicking it again will let you edit the page name).


Hot Drinks
Cold Drinks
Breads / Pastries
Sweets
Sandwiches
Salads
Quiche
Snacks
Caps Flats Lattes
Festival
Special
Caps Flats Lattes 2
Authentic Malaysian

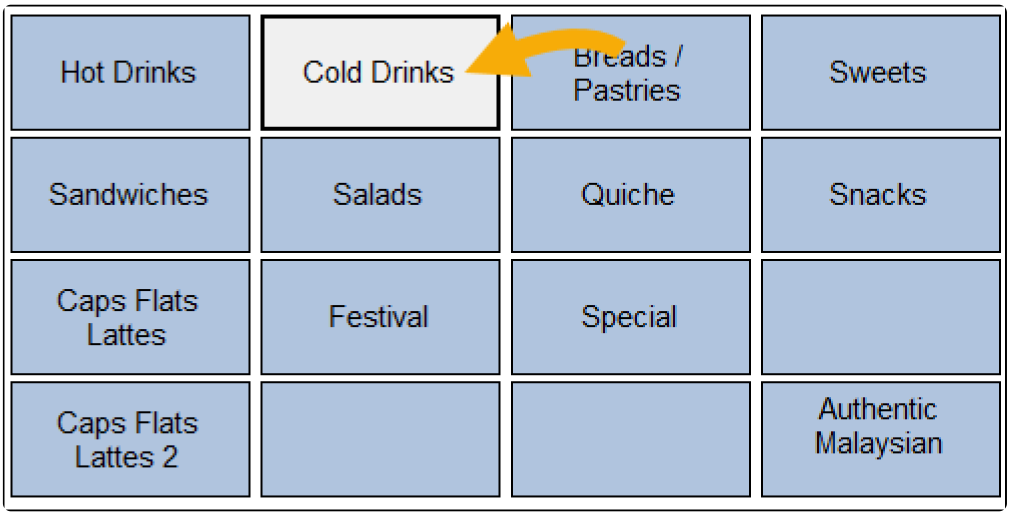
2. Type the name and click the ‘Enter’ button.


Hot Drinks
Cancel
Q W E R T Y U I O P
A S D F G H J K L
Z X C V B N M ENTER
v Space sym
1 2 3
4 5 6
7 8 9
Clear 0 .

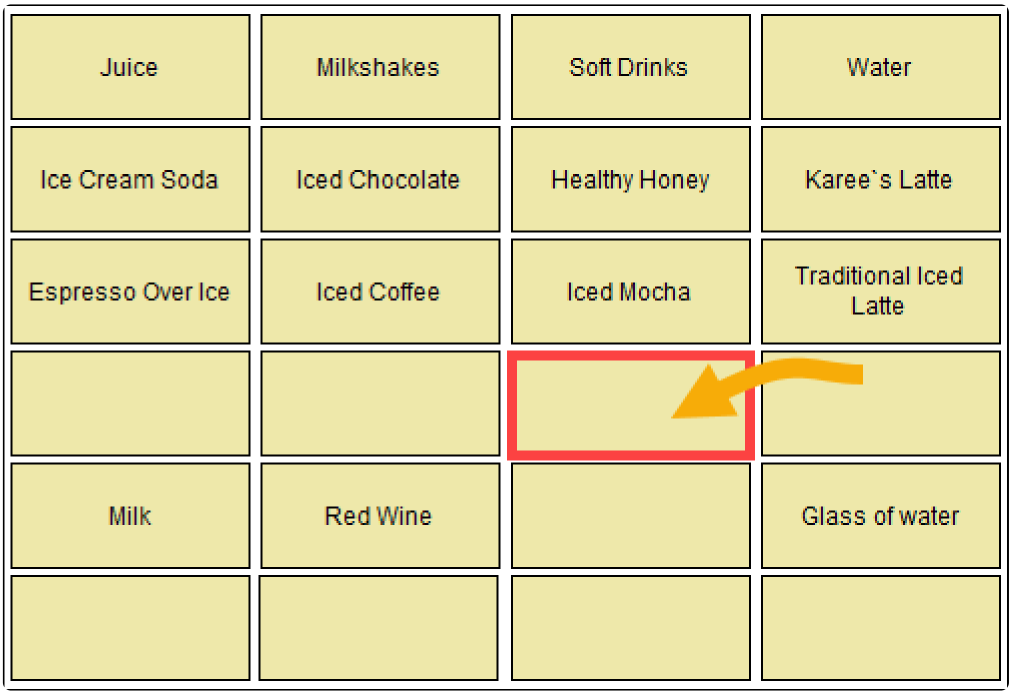
✻ If you want to delete the page, click the ‘Remove Page’ button.

Add a Page Item

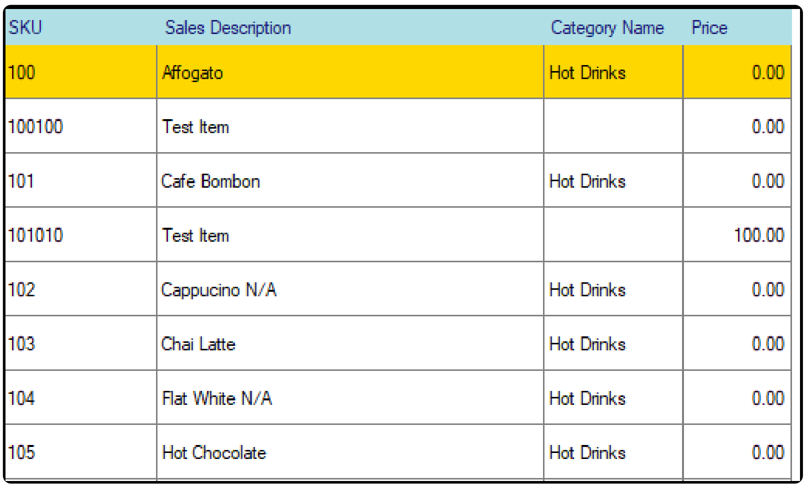
1. Click a page button that has been made.


Hot Drinks
Cold Drinks
Breads / Pastries
Sweets
Sandwiches
Salads
Quiche
Snacks
Caps Flats Lattes
Festival
Special
Caps Flats Lattes 2
Authentic Malaysian

2. Click a page item button (the yellow buttons).

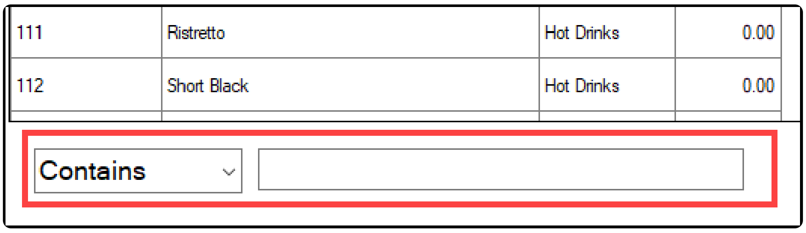

Juice
Milkshakes
Soft Drinks
Water
Ice Cream Soda
Iced Chocolate
Healthy Honey
Karee`s Latte
Espresso Over Ice
Iced Coffee
Iced Mocha
Traditional Iced Latte
Milk
Red Wine
Glass of water

3. Search the item that you want to add.



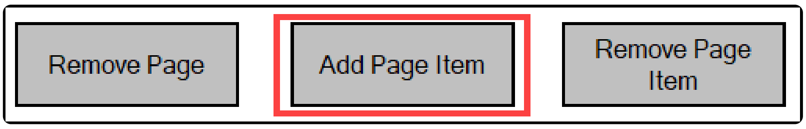
SKU	Sales Description	Category Name	Price
100	Affogato	Hot Drinks	0.00
100100	Test Item		0.00
101	Cafe Bombon	Hot Drinks	0.00
101010	Test Item		100.00
102	Cappucino N/A	Hot Drinks	0.00
103	Chai Latte	Hot Drinks	0.00
104	Flat White N/A	Hot Drinks	0.00
105	Hot Chocolate	Hot Drinks	0.00

You can search the item with item name.



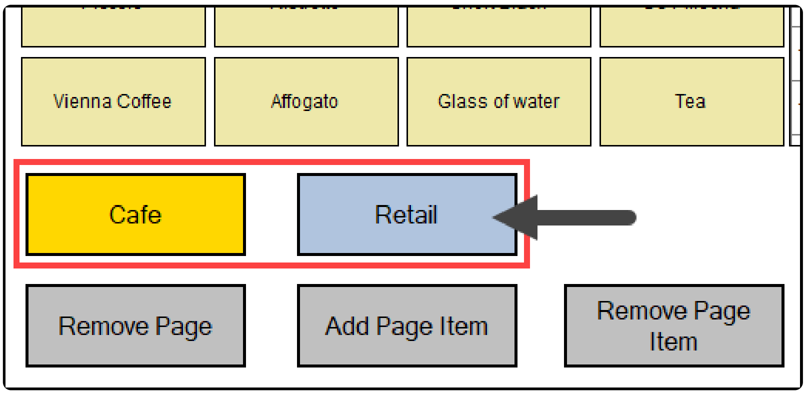
111	Ristretto	Hot Drinks	0.00
112	Short Black	Hot Drinks	0.00

4.Click the ‘Add Page Item’ button at left bottom.

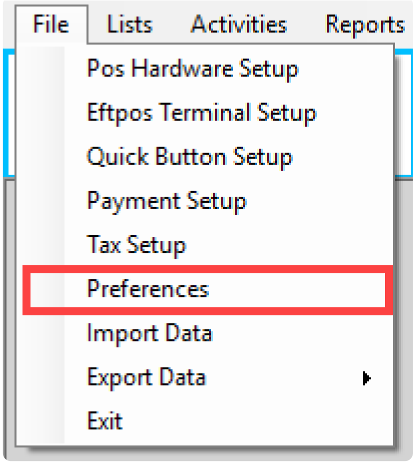

Remove Page
Add Page Item
Remove Page Item

If you want to delete the button, just click the ‘Remove Page Item’ button at left bottom.

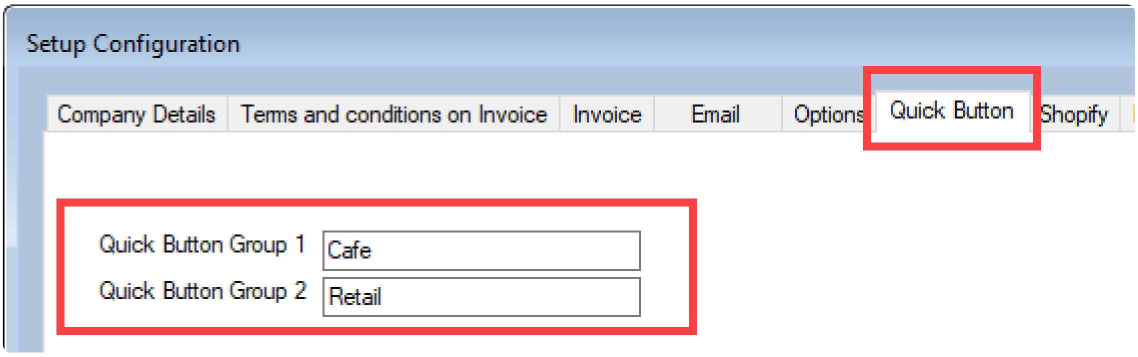
Edit Group name


Vienna Coffee
Affogato
Glass of water
Tea
Cafe
Retail
Remove Page
Add Page Item
Remove Page Item

1. Click 'Preferences' under the 'File' tab.


File
Lists
Activities
Reports
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Exit

2. Go to the 'Quick Button' tab, type the group name and click 'Save'.


Setup Configuration
Company Details
Terms and conditions on Invoice
Invoice
Email
Options
Quick Button
Shopify

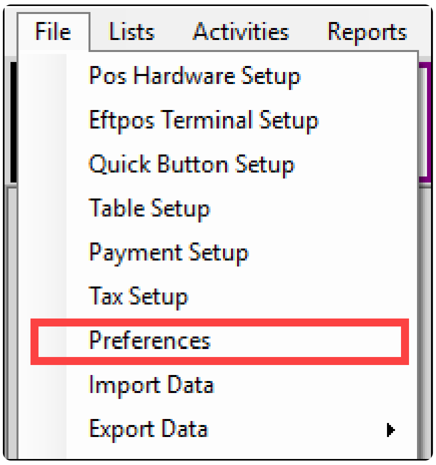
Quick Button Group 1 Cafe
Quick Button Group 2 Retail

! Currently, there are two groups by default and they cannot be removed or have more groups added. Each group has 16 pages and each page has 20 items.

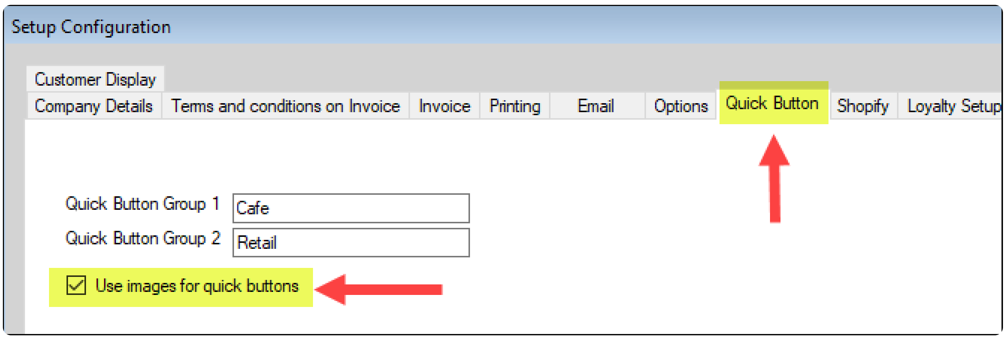
6.7. Register Button Layout with image

If you want to add an image on the button, you need to activate the quick button image option.

Open ‘Preference’ under the ‘File’ tab.


File
Lists
Activities
Reports
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Table Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data

Select Use Image option

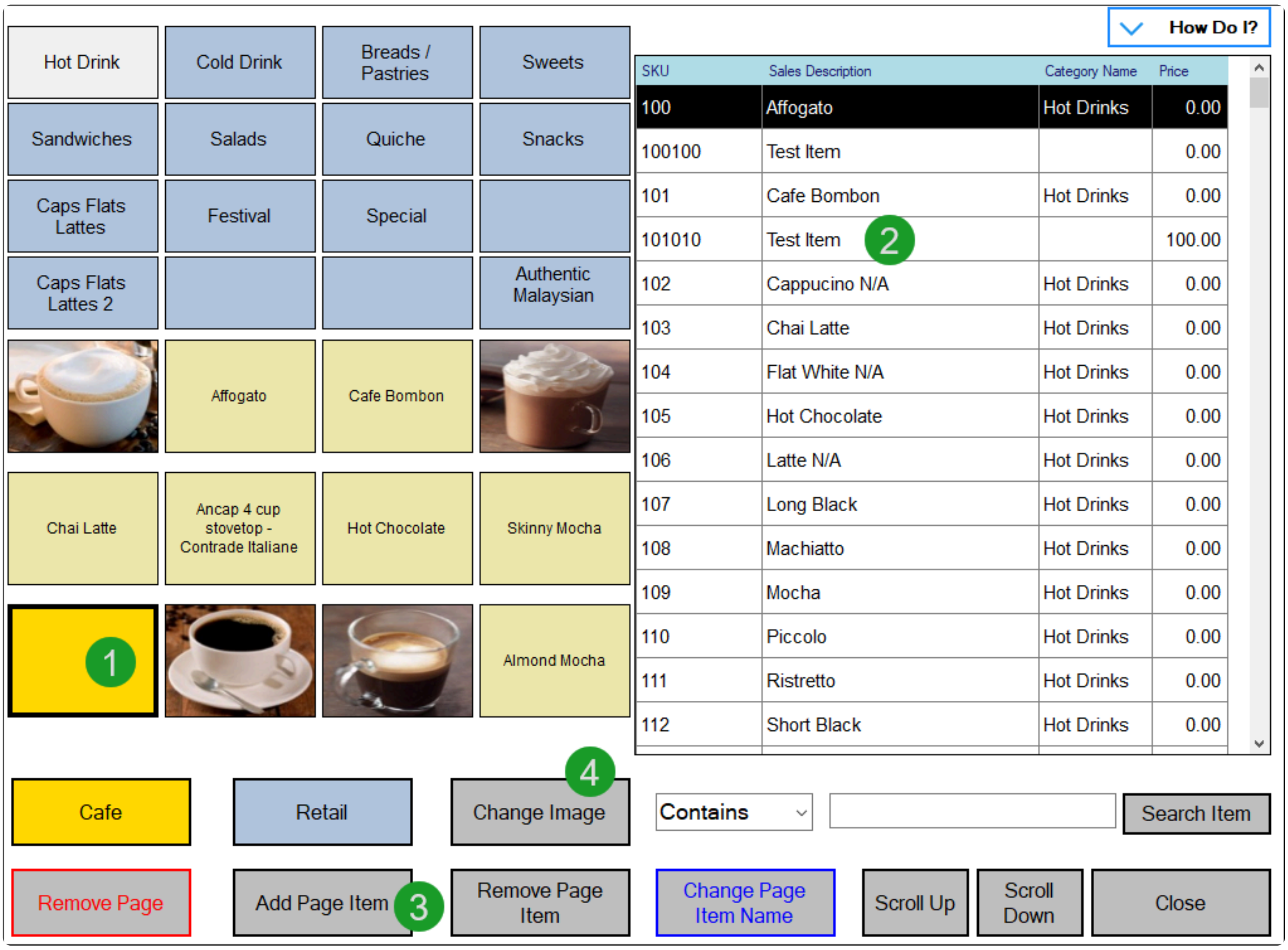

Setup Configuration
Customer Display
Company Details
Terms and conditions on Invoice
Invoice
Printing
Email
Options
Quick Button
Shopify
Loyalty Setup

Quick Button Group 1 Cafe

Quick Button Group 2 Retail

☑ Use images for quick buttons

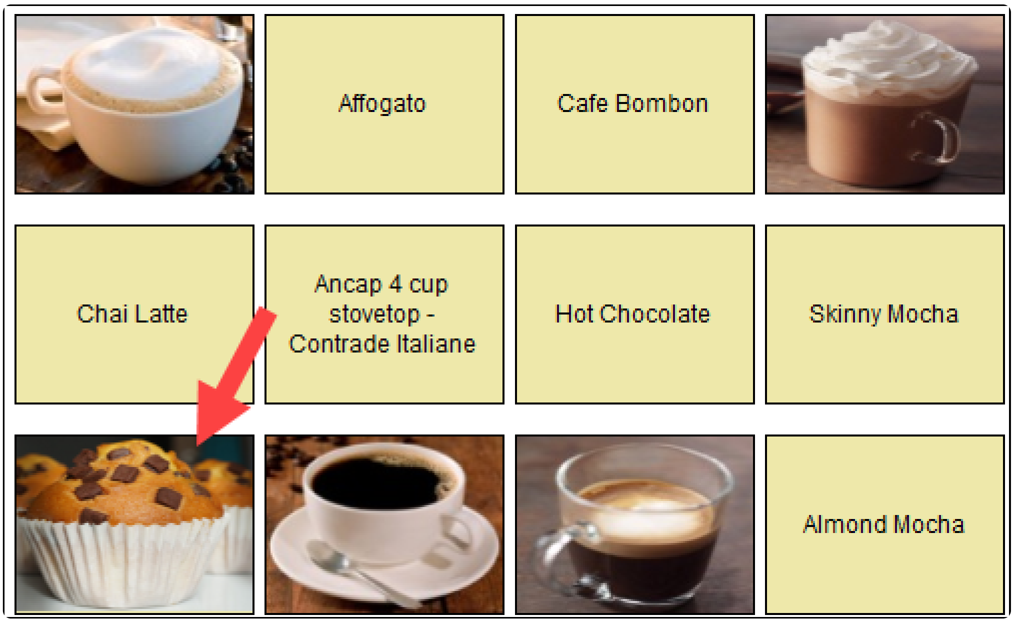
Add a Page Item and Image


How Do I?
Hot Drink
Cold Drink
Breads / Pastries
Sweets
Sandwiches
Salads
Quiche
Snacks
Caps Flats Lattes
Festival
Special
Caps Flats Lattes 2
Authentic Malaysian
Affogato
Cafe Bombon
Chai Latte
Ancap 4 cup stovetop - Contrade Italiane
Hot Chocolate
Skinny Mocha
Almond Mocha
1
2
3
4
Cafe
Retail
Change Image
Contains
Search Item
Remove Page
Add Page Item
Remove Page Item
Change Page Item Name
Scroll Up
Scroll Down
Close

SKU	Sales Description	Category Name	Price
100	Affogato	Hot Drinks	0.00
100100	Test Item		0.00
101	Cafe Bombon	Hot Drinks	0.00
101010	Test Item		100.00
102	Cappucino N/A	Hot Drinks	0.00
103	Chai Latte	Hot Drinks	0.00
104	Flat White N/A	Hot Drinks	0.00
105	Hot Chocolate	Hot Drinks	0.00
106	Latte N/A	Hot Drinks	0.00
107	Long Black	Hot Drinks	0.00
108	Machiatto	Hot Drinks	0.00
109	Mocha	Hot Drinks	0.00
110	Piccolo	Hot Drinks	0.00
111	Ristretto	Hot Drinks	0.00
112	Short Black	Hot Drinks	0.00

Step 1	Select the button.
Step 2	Search the item.
Step 3	Click ‘Add Page Item’ button.
Step 4	Click ‘Change Image’ button. The best image size is 165 × 135 pixel.

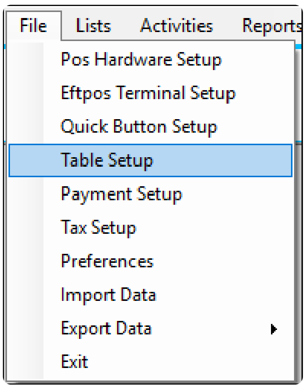
After adding the item and assign the image.


Affogato
Cafe Bombon
Chai Latte
Ancap 4 cup stovetop - Contrade Italiane
Hot Chocolate
Skinny Mocha
Almond Mocha

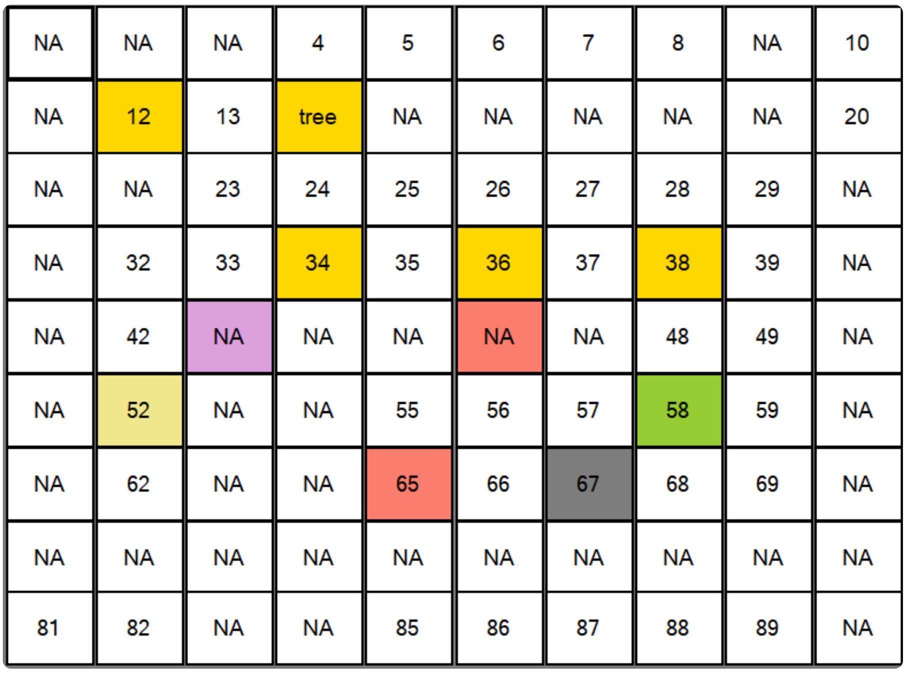
✻ If you need to change the image, you can use the ‘Change Image’ button.

6.8. Tables (optional)

1. Click ‘Table Setup’ under the ‘File’ tab


File
Lists
Activities
Reports
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Table Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Exit

2. Setup Tables

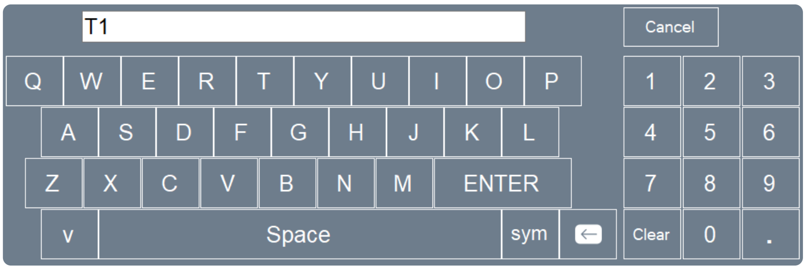


NA	NA	NA	4	5	6	7	8	NA	10
NA	12	13	tree	NA	NA	NA	NA	NA	20
NA	NA	23	24	25	26	27	28	29	NA
NA	32	33	34	35	36	37	38	39	NA
NA	42	NA	NA	NA	NA	NA	48	49	NA
NA	52	NA	NA	55	56	57	58	59	NA
NA	62	NA	NA	65	66	67	68	69	NA
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
81	82	NA	NA	85	86	87	88	89	NA

✻ If a table’s title is ‘NA’, it is an inactivated table and will not show during sales.

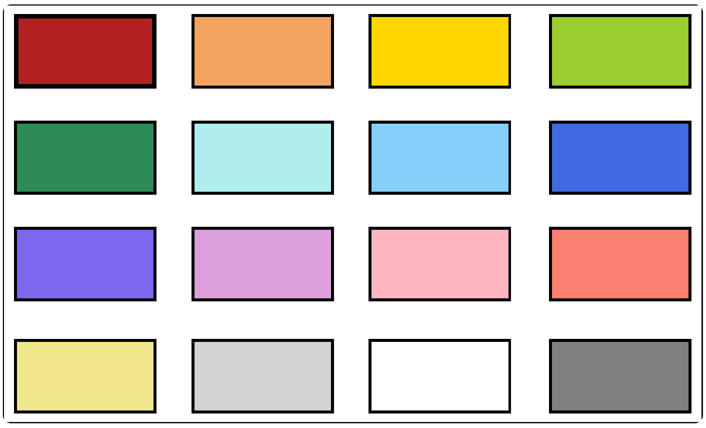
Activate table

Step 1 : Click ‘Change Name’.
Step 2 : Click a table button has ‘NA’ title.
Step 3 : Type the button title eg. ‘T1’, then click ‘Enter’.


T1
Cancel
Q W E R T Y U I O P
A S D F G H J K L
Z X C V B N M ENTER
v Space sym
1 2 3
4 5 6
7 8 9
Clear 0 .

Change table colour

Step 1 : Click ‘Change Colour’.
Step 2 : Select colour.

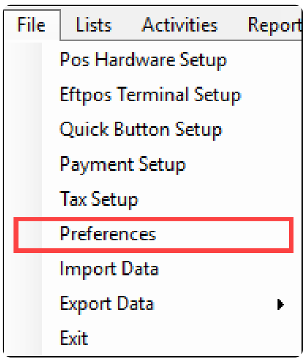


✻ ‘Change Colour’ button’s back colour will change after you make a selection so you know which one is selected.

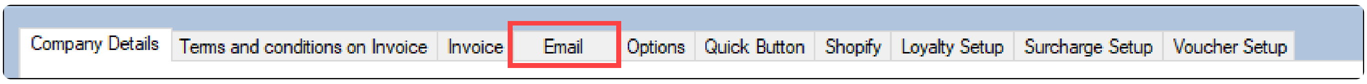
Step 3 : Click the tables that you want to change the colour of.

6.9. Email

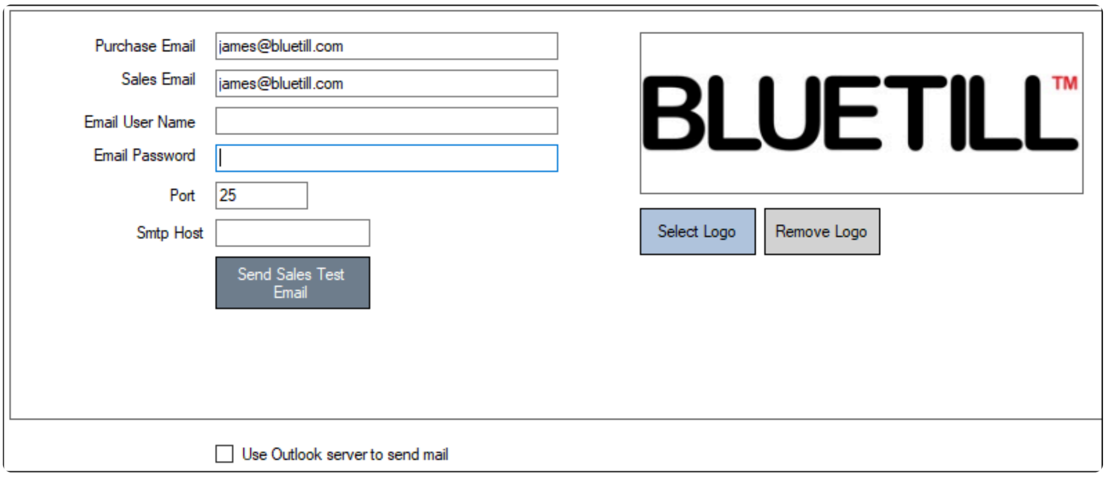
1. Click ‘Preferences’ under the ‘File’ tab


File
Lists
Activities
Report
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Exit

2. Go to Email


Company Details
Terms and conditions on Invoice
Invoice
Email
Options
Quick Button
Shopify
Loyalty Setup
Surcharge Setup
Voucher Setup

3. Setup Email Details



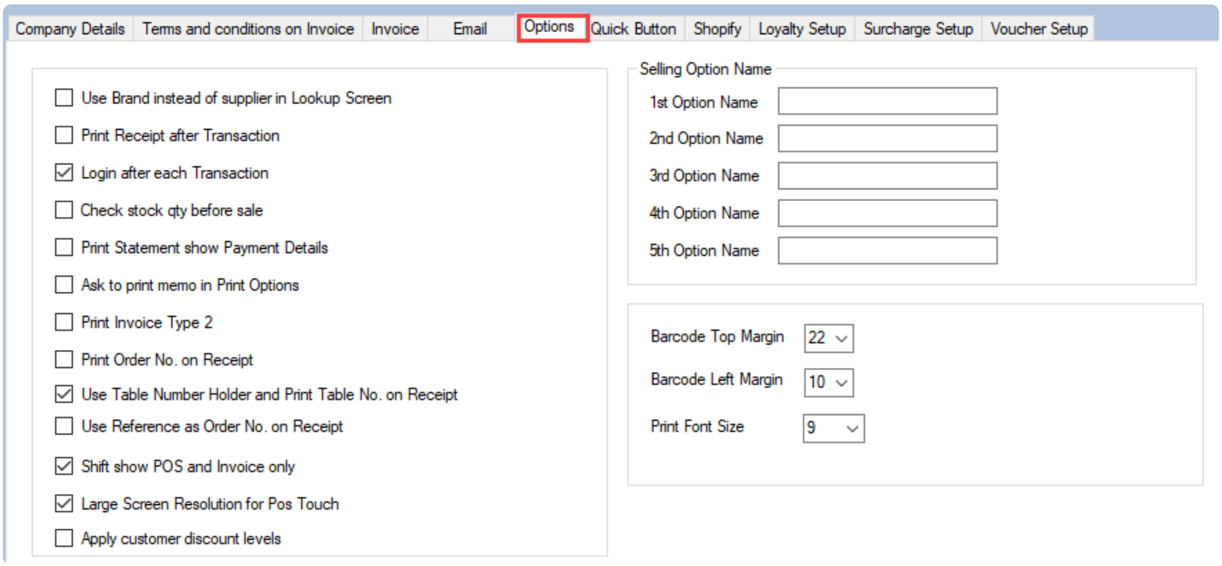
Purchase Email: james@bluetill.com
Sales Email: james@bluetill.com
Email User Name:
Email Password:
Port: 25
Smtp Host:

Send Sales Test Email
BLUETILL TM
Select Logo
Remove Logo
☐ Use Outlook server to send mail

Purchase Email	You can use this email address when you send a purchase order email to the vender (supplier).
Sales Email	You can use this email address when you send a sales invoice email to the customer.
Email User Name	Email username used when you access your email account to send an email.
Email Password	Email password used when you access your email account to send an email.
Port	Outgoing (SMTP) port. For example, gmail port is 465 or 587.
Smtp Host	Outgoing (SMTP) email server. For example, google email server is smtp.gmail.com.
Email Logo	You can insert a small logo when you send an email.
Use Outlook Server	Select this option if you want to use the outlook application rather than send an email through BlueTill.

✻ If your email server uses secure connection like a TLS or SSL, BlueTill will configure it automatically.

6.10. Options


Company Details
Terms and conditions on Invoice
Invoice
Email
Options
Quick Button
Shopify
Loyalty Setup
Surcharge Setup
Voucher Setup

- ☐ Use Brand instead of supplier in Lookup Screen
- ☐ Print Receipt after Transaction
- ☑ Login after each Transaction
- ☐ Check stock qty before sale
- ☐ Print Statement show Payment Details
- ☐ Ask to print memo in Print Options
- ☐ Print Invoice Type 2
- ☐ Print Order No. on Receipt
- ☑ Use Table Number Holder and Print Table No. on Receipt
- ☐ Use Reference as Order No. on Receipt
- ☑ Shift show POS and Invoice only
- ☑ Large Screen Resolution for Pos Touch
- ☐ Apply customer discount levels

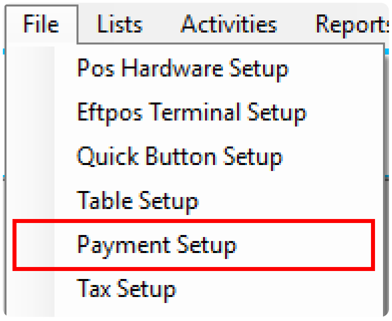
Selling Option Name
1st Option Name
2nd Option Name
3rd Option Name
4th Option Name
5th Option Name

Barcode Top Margin 22
Barcode Left Margin 10
Print Font Size 9

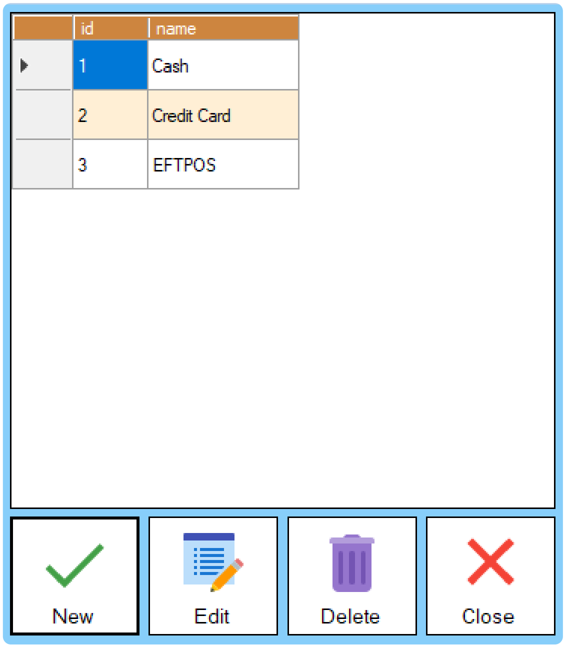
Use Table Number Holder and Print Table No. on Receipt	Enter the Table Holder Number when making a sale on the Pos Touch screen.
Use Reference as Order No. on Receipt	Print reference on receipt when invoice prints on the receipt printer

6.11. Payment Setup

1. Click ‘Payment Setup’ under the ‘File’ tab


File
Lists
Activities
Report
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Table Setup
Payment Setup
Tax Setup

2. Payment Setup Screen



id	name
1	Cash
2	Credit Card
3	EFTPOS

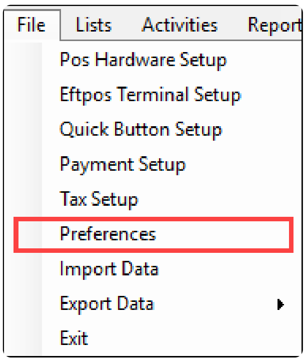
New
Edit
Delete
Close

New	Add new payment type
Edit	Edit payment type
Delete	Remove payment type

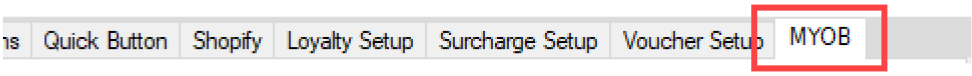
✻ If you want to connect Tyro or Westpac Presto EFTPOS, you can set it up in ‘Eftpos Terminal Setup’. Click here for Westpac Presto instruction

6.12. Export to MYOB

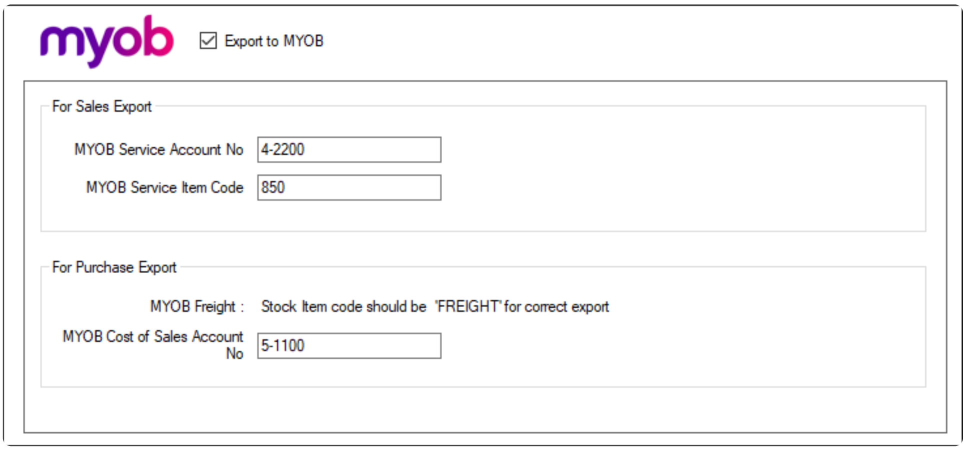
1. Open ‘Preferences’ under the ‘File’ tab


File
Lists
Activities
Report
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Exit

2. Go to MYOB


ns
Quick Button
Shopify
Loyalty Setup
Surcharge Setup
Voucher Setup
MYOB

3. Setup MYOB Details



☑ Export to MYOB

For Sales Export

MYOB Service Account No: 4-2200

MYOB Service Item Code: 850

For Purchase Export

MYOB Freight : Stock Item code should be 'FREIGHT' for correct export

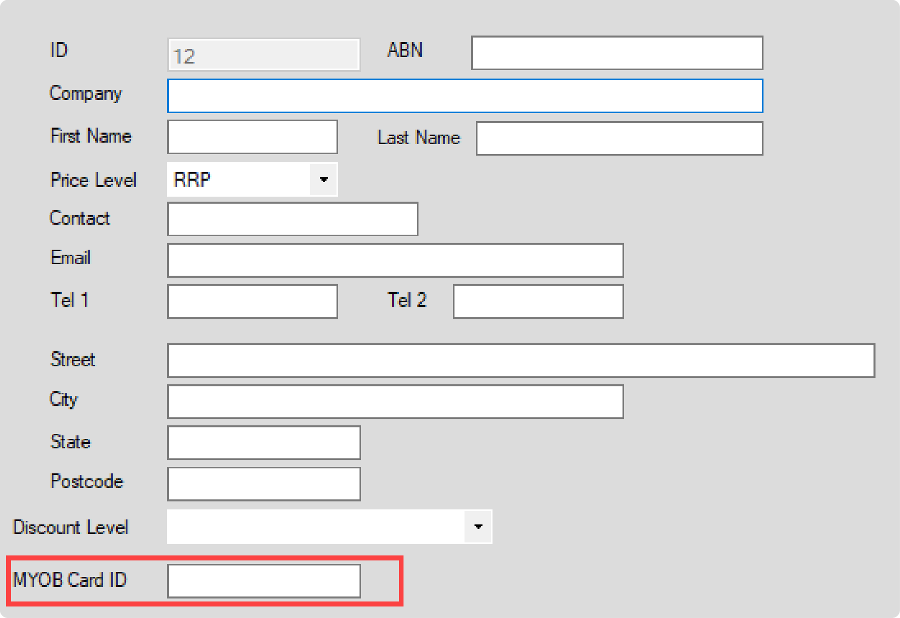
MYOB Cost of Sales Account No: 5-1100

MYOB Service Account No	Sales or Credit Invoice will export to MYOB as a service item invoice because BLUETILL doesn’t handle MYOB inventory item. A MYOB service account number and service item code will be required to generate the export text file. Click Here for instruction
MYOB Service Item Code	MYOB service item code for exporting the invoice item.
MYOB Freight	If the item code is ‘FREIGHT’, this item will export to MYOB’s freight.
MYOB Cost of Sales	When exporting purchases (Received Item Invoice), BLUETILL uses the Cost of Sales account number in MYOB. Click Here for instruction

Account No	

4. Setup MYOB Card ID for Customer

Customer



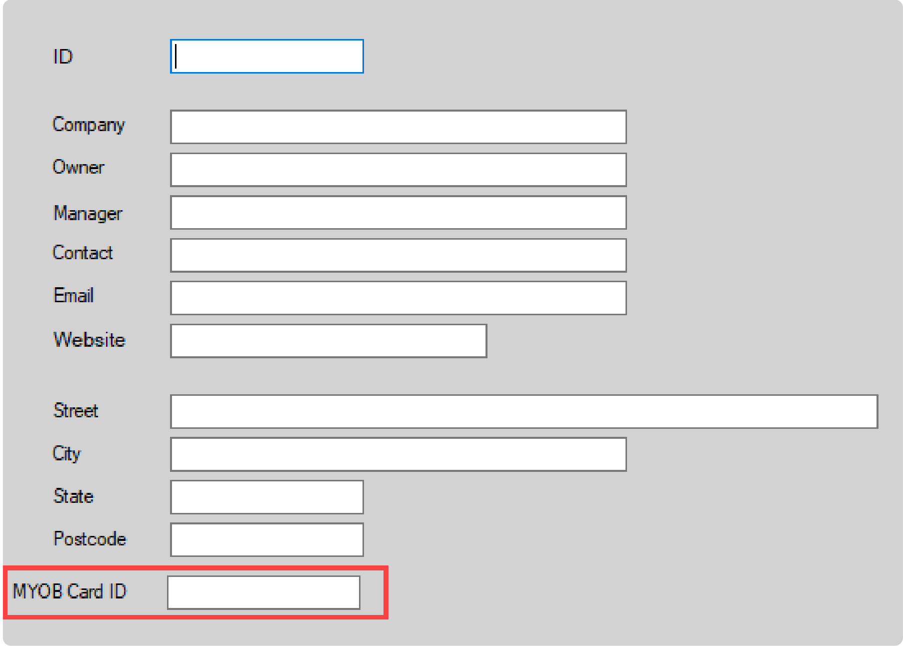
ID: 12

Price Level: RRP

ID
ABN
Company
First Name
Last Name
Price Level
Contact
Email
Tel 1
Tel 2
Street
City
State
Postcode
Discount Level
MYOB Card ID

5. Setup MYOB Card ID for Supplier

Supplier

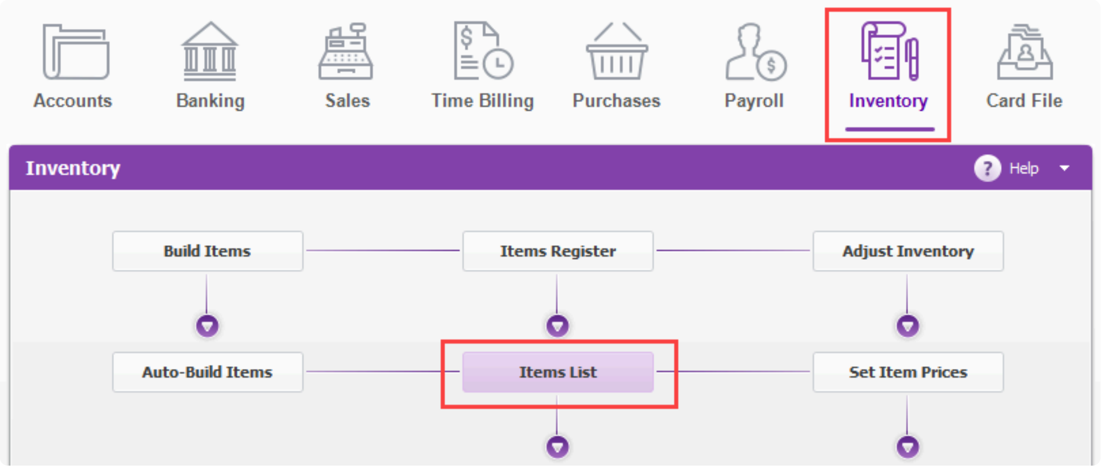


ID
Company
Owner
Manager
Contact
Email
Website
Street
City
State
Postcode
MYOB Card ID

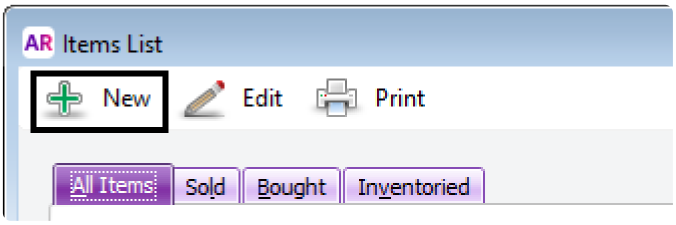
[How to export invoice to MYOB]
[How to export purchase to MYOB]

6.12.1. Setup MYOB service item code

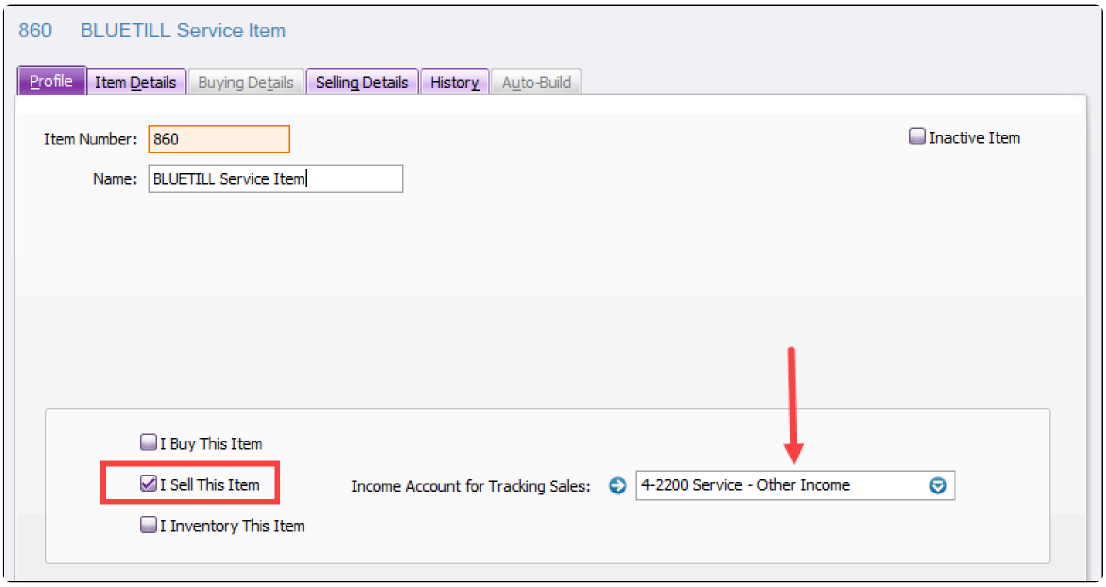
1. Click ‘Inventory’ then ‘Item List’


Accounts
Banking
Sales
Time Billing
Purchases
Payroll
Inventory
Card File
Inventory
Help
Build Items
Items Register
Adjust Inventory
Auto-Build Items
Items List
Set Item Prices

2. Click the ‘New’ button


Items List
New
Edit
Print
All Items
Sold
Bought
Inventoried

3. Setup Details


860 BLUETILL Service Item
Profile
Item Details
Buying Details
Selling Details
History
Auto-Build

Item Number: 860

Name: BLUETILL Service Item

☐ Inactive Item

☐ I Buy This Item

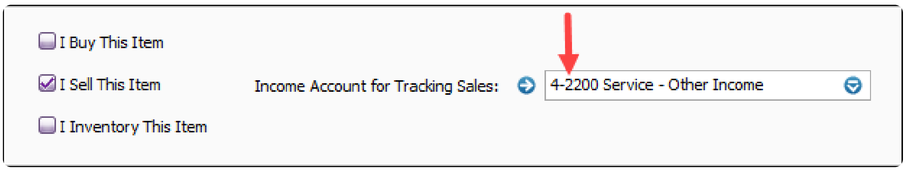
☑ I Sell This Item

☐ I Inventory This Item

Income Account for Tracking Sales: 4-2200 Service - Other Income

✻ You can connect an existing service item.

3. Get the existing item’s service account number



☐ I Buy This Item

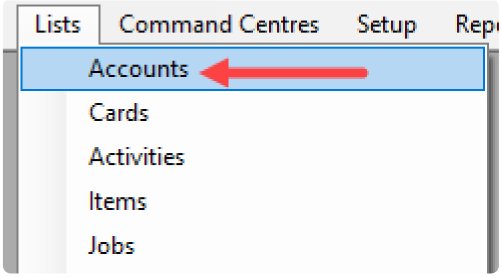
☑ I Sell This Item

Income Account for Tracking Sales: 4-2200 Service - Other Income

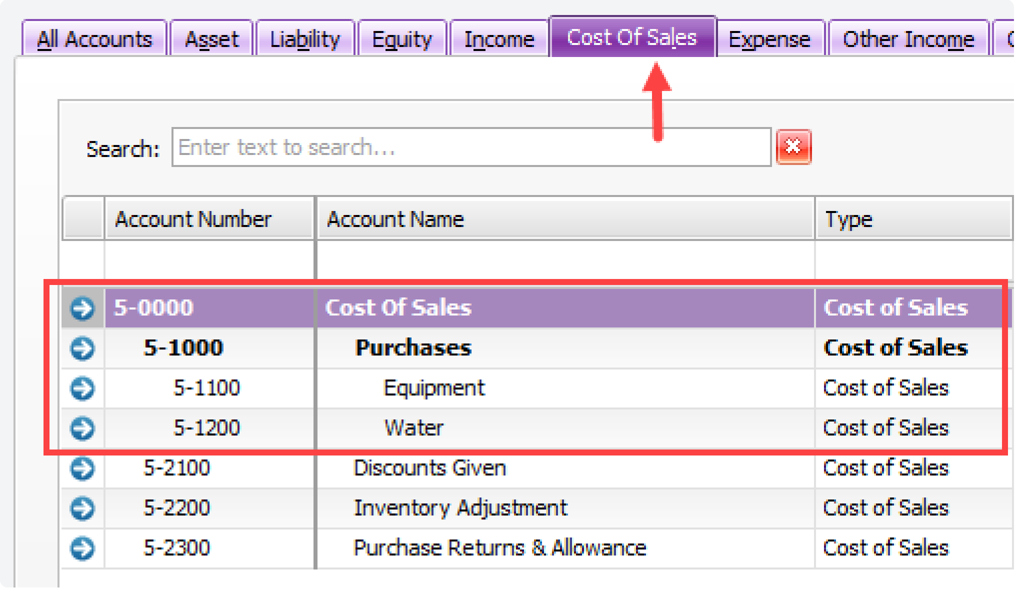
☐ I Inventory This Item

6.12.2. MYOB Cost of Sales Account No

1. Click ‘Accounts’ under the ‘List’ tab


Lists
Command Centres
Setup
Rep
Accounts
Cards
Activities
Items
Jobs

2. Click the ‘Cost of Sales’ tab


All Accounts
Asset
Liability
Equity
Income
Cost Of Sales
Expense
Other Income
Search:
Enter text to search...

Account Number	Account Name	Type
5-0000	Cost Of Sales	Cost of Sales
5-1000	**Purchases**	**Cost of Sales**
5-1100	Equipment	Cost of Sales
5-1200	Water	Cost of Sales
5-2100	Discounts Given	Cost of Sales
5-2200	Inventory Adjustment	Cost of Sales
5-2300	Purchase Returns & Allowance	Cost of Sales

✻ You can set up a new Cost of Sales account no like a 5-1300.

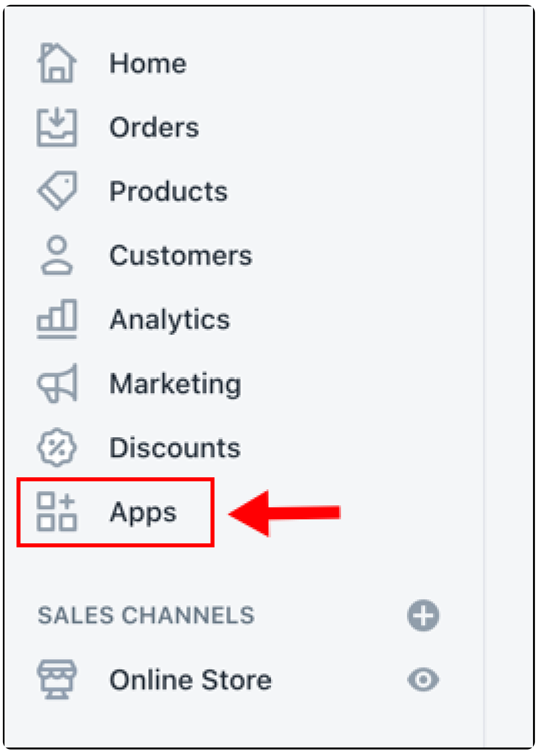
! Please don’t use 5-0000 (Cost of Sales) or 5-1000 (Purchase) Account Number

6.13. Connect to Shopify

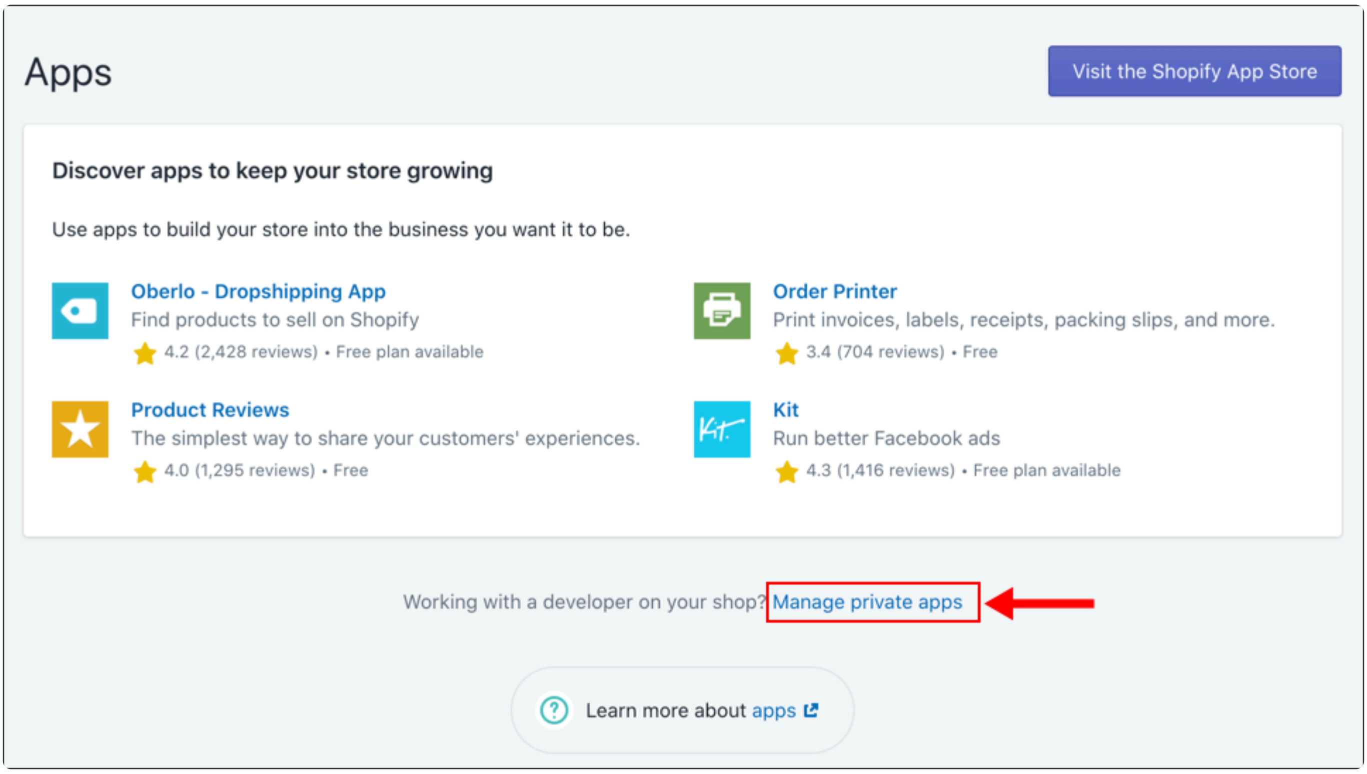
Generate credentials from the Shopify admin

Steps:

1. From your Shopify admin, go to **Apps**.


Home
Orders
Products
Customers
Analytics
Marketing
Discounts
Apps
SALES CHANNELS
Online Store

2. Click **Manage private apps**.


Apps
Visit the Shopify App Store

Discover apps to keep your store growing

Use apps to build your store into the business you want it to be.

Oberlo - Dropshipping App
Find products to sell on Shopify
4.2 (2,428 reviews) • Free plan available

Order Printer
Print invoices, labels, receipts, packing slips, and more.
3.4 (704 reviews) • Free

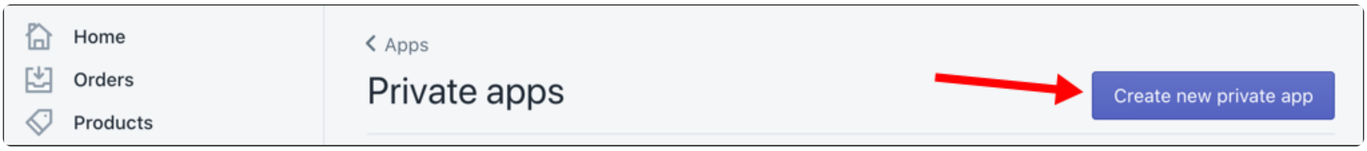
Product Reviews
The simplest way to share your customers' experiences.
4.0 (1,295 reviews) • Free

Kit
Run better Facebook ads
4.3 (1,416 reviews) • Free plan available

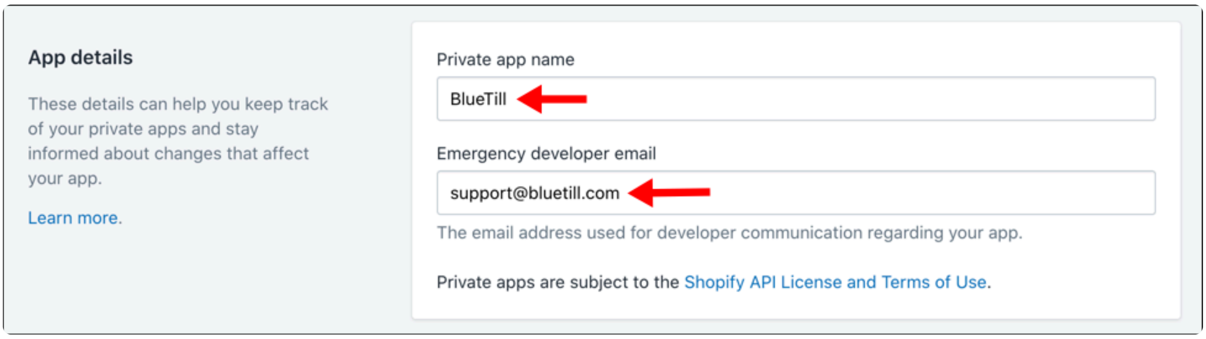
Working with a developer on your shop? Manage private apps

Learn more about apps

3. Click **Create a new private app**.


Home
Orders
Products
Apps
Private apps
Create new private app

4. In the **App details** section, enter a ‘**BlueTill**’ for your private app and a ‘**support@bluetill.com**’ as a contact email address.


App details

These details can help you keep track of your private apps and stay informed about changes that affect your app.

Learn more.

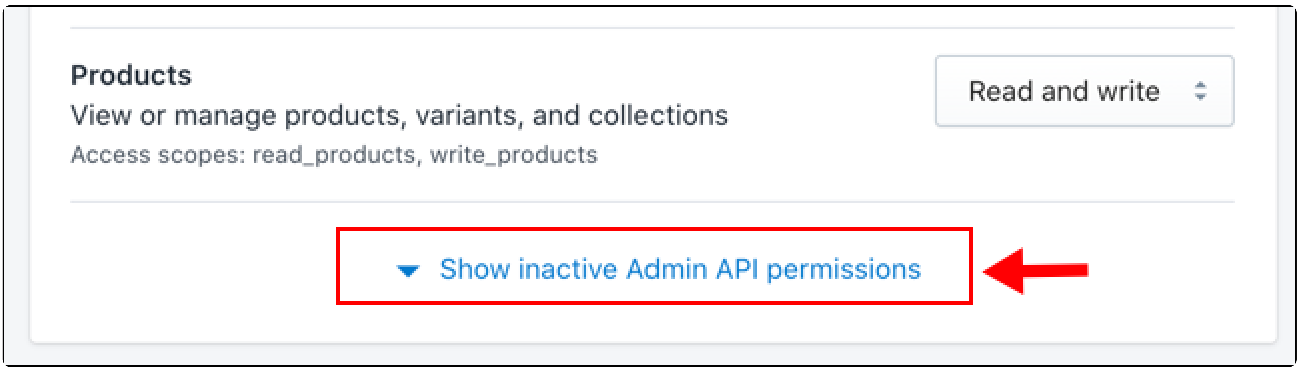
Private app name: BlueTill

Emergency developer email: support@bluetill.com

The email address used for developer communication regarding your app.

Private apps are subject to the Shopify API License and Terms of Use.

5. In the **Admin API** section, click **Show inactive Admin API permissions**.


Products

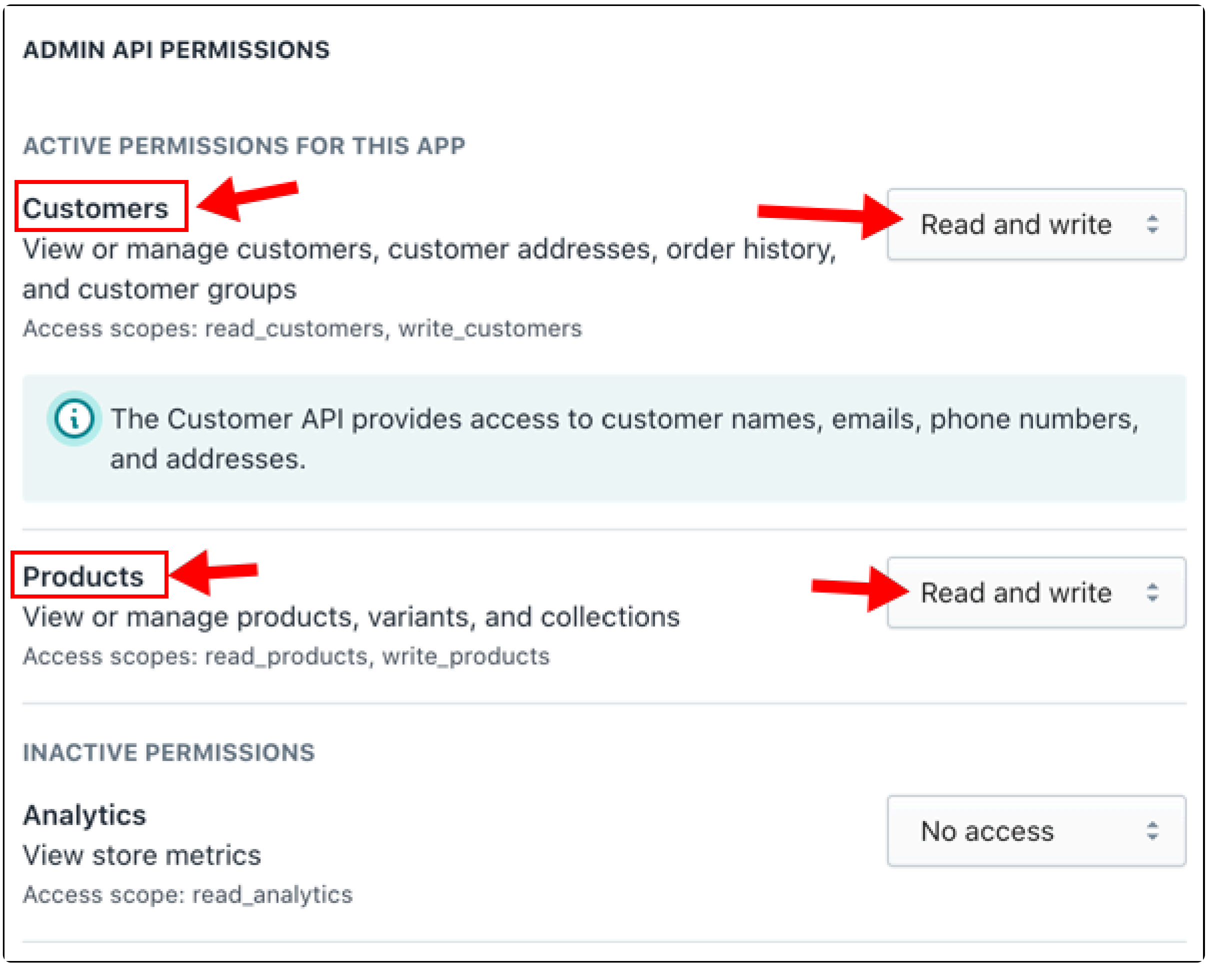
View or manage products, variants, and collections

Access scopes: read_products, write_products

Read and write

Show inactive Admin API permissions

6. Select the ‘Products’ and ‘Customers’, then change permission to **Read and Write**.



ADMIN API PERMISSIONS

ACTIVE PERMISSIONS FOR THIS APP

Customers
View or manage customers, customer addresses, order history, and customer groups
Access scopes: read_customers, write_customers
Read and write

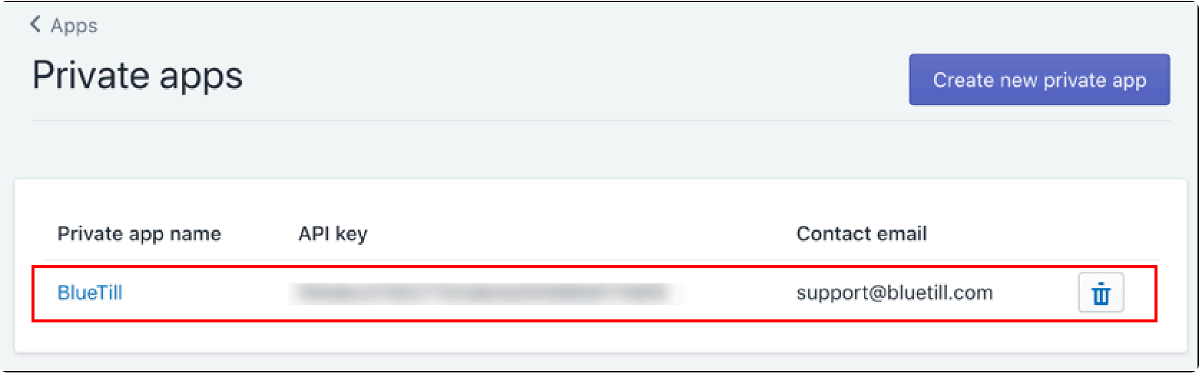
The Customer API provides access to customer names, emails, phone numbers, and addresses.

Products
View or manage products, variants, and collections
Access scopes: read_products, write_products
Read and write

INACTIVE PERMISSIONS

Analytics
View store metrics
Access scope: read_analytics
No access

7. When you're done, click **Save**. You can see the BlueTill app.

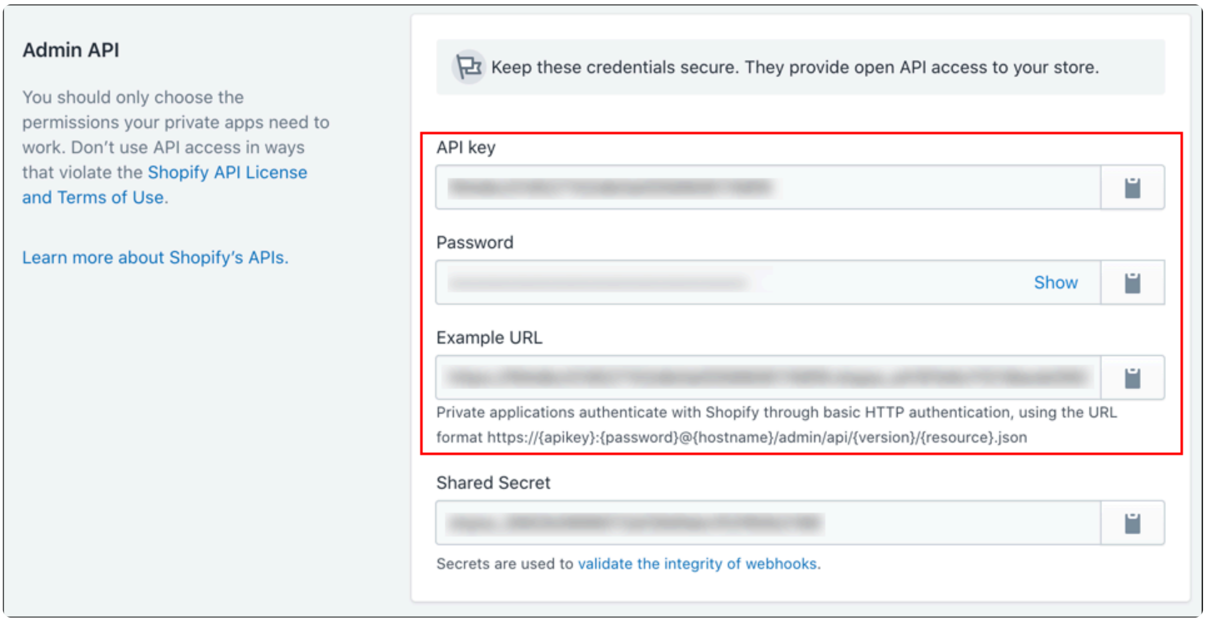


Private apps

Private app name	API key	Contact email
BlueTill	[redacted]	support@bluetill.com

Connect with BlueTill

1. Get the Shopify API and Password
After Save the Private Apps, you can get the Shopify API and password. BlueTill needs **API key**, **Password**, and **URL**.



Admin API

You should only choose the permissions your private apps need to work. Don't use API access in ways that violate the Shopify API License and Terms of Use.

Learn more about Shopify's APIs.

Keep these credentials secure. They provide open API access to your store.

API key

Password

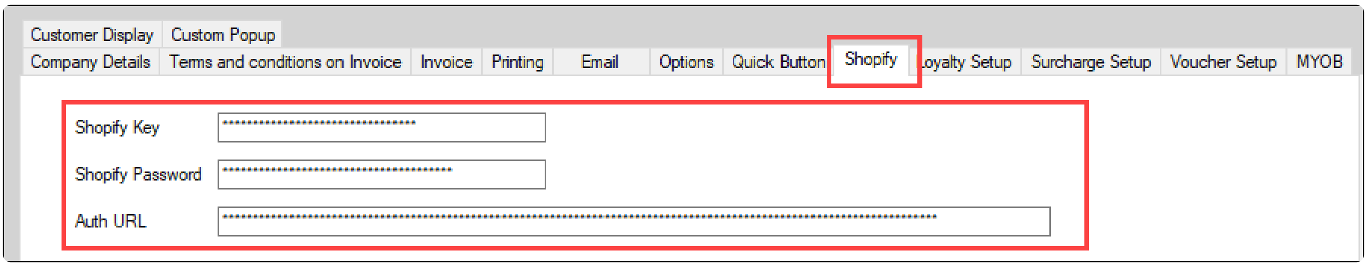
Example URL

Private applications authenticate with Shopify through basic HTTP authentication, using the URL format https://{apikey}:{password}@{hostname}/admin/api/{version}/{resource}.json

Shared Secret

Secrets are used to validate the integrity of webhooks.

2. Open **Preferences** on BlueTill menu, then go to **Shopify**.



Customer Display
Custom Popup
Company Details
Terms and conditions on Invoice
Invoice
Printing
Email
Options
Quick Button
Shopify
Loyalty Setup
Surcharge Setup
Voucher Setup
MYOB

Shopify Key ********************************

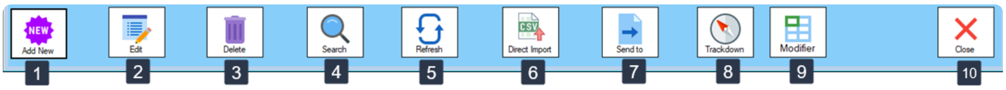
Shopify Password **************************************

Auth URL **

Shopify Key	Copy **API key** from Admin API
Shopify Password	Copy **Password** from Admin API
Auth URL	Copy **Example URL** from Admin API

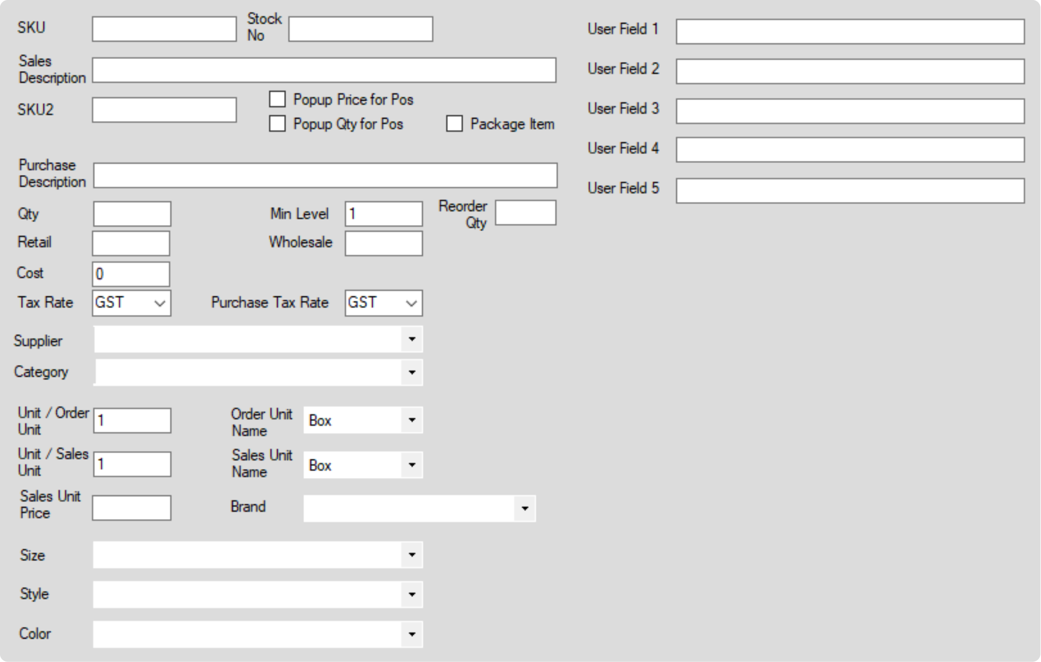
7. Lists

7.1. Stock


NEW
Add New
1
Edit
2
Delete
3
Search
4
Refresh
5
CSV
Direct Import
6
Send to
7
Trackdown
8
Modifier
9
Close
10

Add New	Add new item.
Add New	Edit item.
Delete	Delete the item (it doesn't affect the sales history).
Search	Search for item.
Refresh	Refresh the Item list and remove all filters.
Import Direct	Update item details by importing csv file.
Send to	Save the item list to a csv file.
Trackdown	Check the item's activities such as sales, purchases and quantity adjustments.
Modifier	Open the item's modifier setup.

1. Create a Basic Item

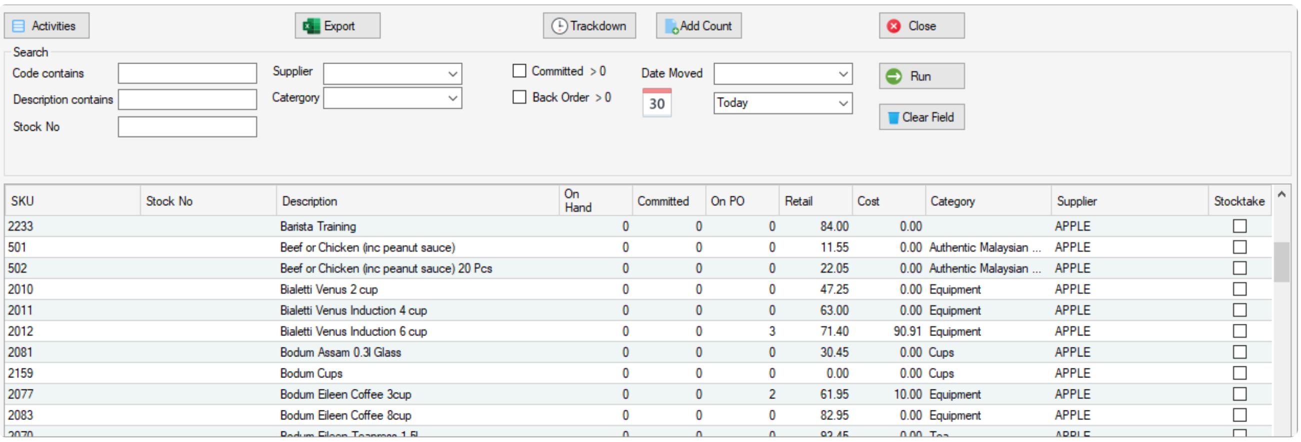

SKU
Stock No
Sales Description
SKU2
☐ Popup Price for Pos
☐ Popup Qty for Pos
☐ Package Item
Purchase Description
Qty
Retail
Cost
Tax Rate
Reorder Qty
Wholesale
Supplier
Category
Size
Style
Color
Brand
Sales Unit Price
User Field 1
User Field 2
User Field 3
User Field 4
User Field 5

Min Level 1
Cost 0
Tax Rate GST
Purchase Tax Rate GST
Unit / Order Unit 1
Order Unit Name Box
Unit / Sales Unit 1
Sales Unit Name Box

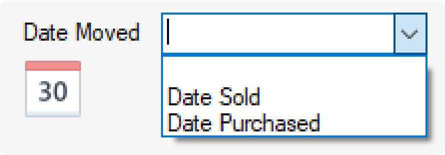
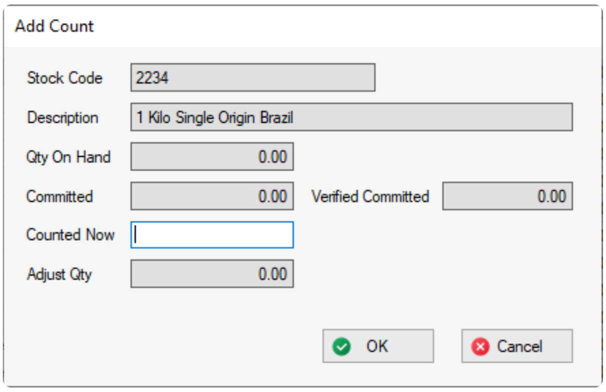
SKU	Unique identifier created for each item and used to generate barcodes.
Stock No	Item reference. You can use this field as the vendor's (supplier's) item code as sometimes vendors use their own code rather than a barcode and you will need it to order the item.
Sales Description	What cashiers see at the register and what prints on receipts. Cashiers can search for items by Name on the Sales screen.
Pop Up	If you choose this option, a popup screen will show whenever you select the item in the Sales

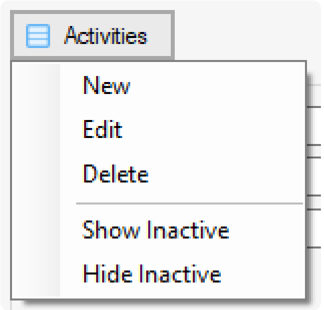
Price for Pos	screen prompting you to enter a price.
Pop Up Qty for Pos	If you choose this option, a popup screen will show whenever you select the item in the Sales screen prompting you to enter a quantity.
Package	If you choose this option, you can setup a package item which includes several items each with individual quantities. Whenever you select a package item, linked items will be displayed on the Sales screen and their individual quantities will decrease from the inventory after you complete a sale.
SKU2	2nd unique identifier for the item. If you setup an item with SKU = 100 and SKU2 = 101, whenever you scan/type 100 or 101 in the search bar, item will be selected and displayed.
Purchase Description	You can use this field if you want to use a different description when you order from a vendor (supplier).
Retail	The amount the item sells for to a retail customer.
Wholesale	The amount the item sells for to a wholesale customer.
Cost	The amount that has to be paid for the business to acquire an individual item.
Unit / Order Unit	The quantity amount that will increase whenever you buy the item as ‘Order Unit’. Eg. If you set up order unit qty as 12 and buy 1 item as order unit, total stock quantity for that item will be increased by 12.
Order Unit Name	The name of the order unit. The default name is ‘Box’.
Unit / Sales Unit	The quantity amount that will decrease whenever you sell the item as ‘Sales Unit’. Eg. If you set up sales unit qty as 12 and sell 1 item as sales unit, total stock quantity for that item will be decreased by 12.
Sales Unit Name	The name of the sales unit. The default name is ‘Box’.
Sales Unit Price	The amount the item sells for when sold as a sales unit.
Brand	Brand of the item. You can use brand instead of supplier when you search. Most users use brand instead of supplier when they want to hide the vendor’s (supplier’s) name from staff.
User Field	Users can setup their own data field for items for any purpose. For example, you can use this field to describe the item’s location in the warehouse.

7.1.1. Stock List


Activities
Export
Trackdown
Add Count
Close
Search
Code contains
Description contains
Stock No
Supplier
Catergory
☐ Committed > 0
☐ Back Order > 0
Date Moved
30
Today
Run
Clear Field

SKU	Stock No	Description	On Hand	Committed	On PO	Retail	Cost	Category	Supplier	Stocktake
2233		Barista Training	0	0	0	84.00	0.00		APPLE	☐
501		Beef or Chicken (inc peanut sauce)	0	0	0	11.55	0.00	Authentic Malaysian ...	APPLE	☐
502		Beef or Chicken (inc peanut sauce) 20 Pcs	0	0	0	22.05	0.00	Authentic Malaysian ...	APPLE	☐
2010		Bialetti Venus 2 cup	0	0	0	47.25	0.00	Equipment	APPLE	☐
2011		Bialetti Venus Induction 4 cup	0	0	0	63.00	0.00	Equipment	APPLE	☐
2012		Bialetti Venus Induction 6 cup	0	0	3	71.40	90.91	Equipment	APPLE	☐
2081		Bodum Assam 0.3l Glass	0	0	0	30.45	0.00	Cups	APPLE	☐
2159		Bodum Cups	0	0	0	0.00	0.00	Cups	APPLE	☐
2077		Bodum Eileen Coffee 3cup	0	0	2	61.95	10.00	Equipment	APPLE	☐
2083		Bodum Eileen Coffee 8cup	0	0	0	82.95	0.00	Equipment	APPLE	☐

Code contains	Search an item that contains characters in the stock code (SKU).
Description contains	Search an item that contains characters in the stock description.
Stock No	Search an item that contains characters in the stock no.
Supplier	Search an item that assigned selected supplier.
Category	Search an item that assigned selected category.
Date Moved	 Date Moved 30 Date Sold Date Purchased Search an item that has Sold or Purchases item movement in the selected date period.
Trackdown	Search an item activities details.
Add Count	 Add Count Counted Now OK Cancel Stock Code: 2234 Description: 1 Kilo Single Origin Brazil Qty On Hand: 0.00 Committed: 0.00 Verified Committed: 0.00 Adjust Qty: 0.00 Stocktake.
Export	Export to Excel.

Activities	 Activities New Edit Delete Show Inactive Hide Inactive
Run	Run selected query.
Clear Field	Clear the criteria for search.

7.2. Category

Categories are item groups used for organising inventory and analysis in sales reports.

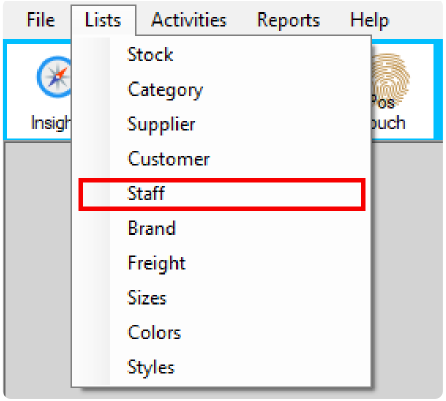
7.3. Supplier

The supplier (vendor) or party from whom the item is acquired.

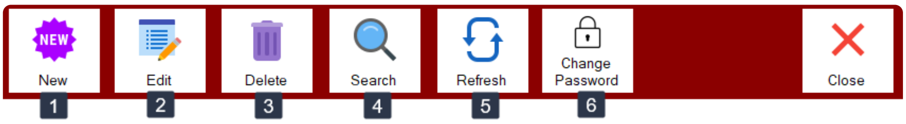
7.4. Customer

7.5. Staff

Open Staff Screen


File
Lists
Activities
Reports
Help
Insigh
Pos
uch
Stock
Category
Supplier
Customer
Staff
Brand
Freight
Sizes
Colors
Styles

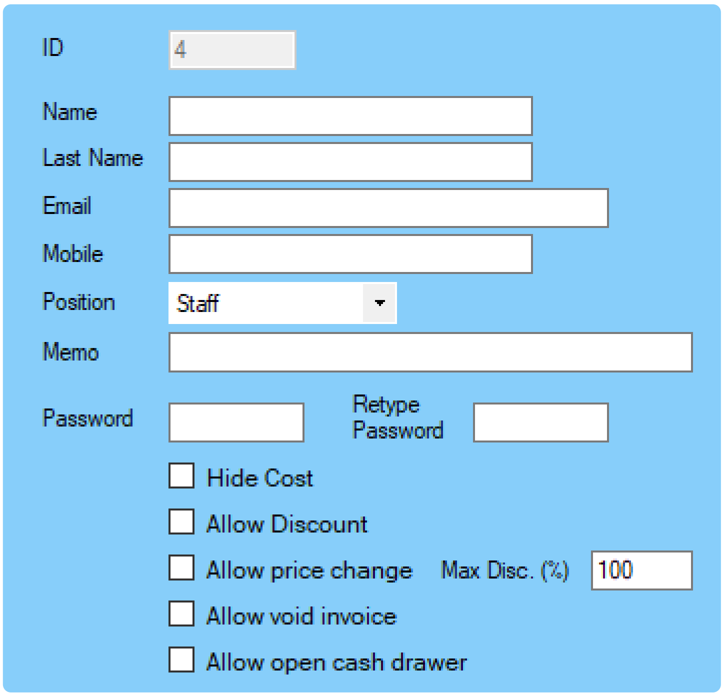
Features


NEW
New
1
Edit
2
Delete
3
Search
4
Refresh
5
Change Password
6
Close

New	Add new staff. If you click this button, staff edit screen will be displayed
Edit	Edit staff details. If you click this button, staff edit screen will be displayed
Delete	Delete staff
Search	Search for staff
Refresh	Refresh the staff list and removes all filters.
Change Password	Change staff password

! Each transaction (sale or purchase) records the staff code so if you delete the staff, staff details won’t display properly.

Edit Staff



ID	4
Name	
Last Name	
Email	
Mobile	
Position	Staff
Memo	
Password	
Retype Password	

☐ Hide Cost

☐ Allow Discount

☐ Allow price change Max Disc. (%) 100

☐ Allow void invoice

☐ Allow open cash drawer

Position	Each position has different security clearances / permissions. 'Staff' can make sales and purchases but can't register/edit an item and can't see the report or access 'Preferences'. The manager can in addition to 'Staff' permissions, see the report but they can't access 'Preferences'.
Password	Each staff member requires a password to login to the Pos Sale/Pos Touch screen. They are also used to check for permission access to certain features. Passwords are made up of digits only.
Hide Cost	If you select this option, staff member can't see the cost of the items in the stock list or lookup screen.
Allow Discount	If you select this option, staff member can apply discount during sales.
Allow price change	If you select this option, staff member can change the unit price of an item during sales.
Maximum Disc (%)	If staff member is allowed to apply discounts, you can set up a maximum discount rate that they can apply.
Allow void invoice	If you select this option, staff member can void invoices.
Allow open cash drawer	If you select this option, staff member can open cash drawer without transaction.

7.6. Brand

7.7. Freight

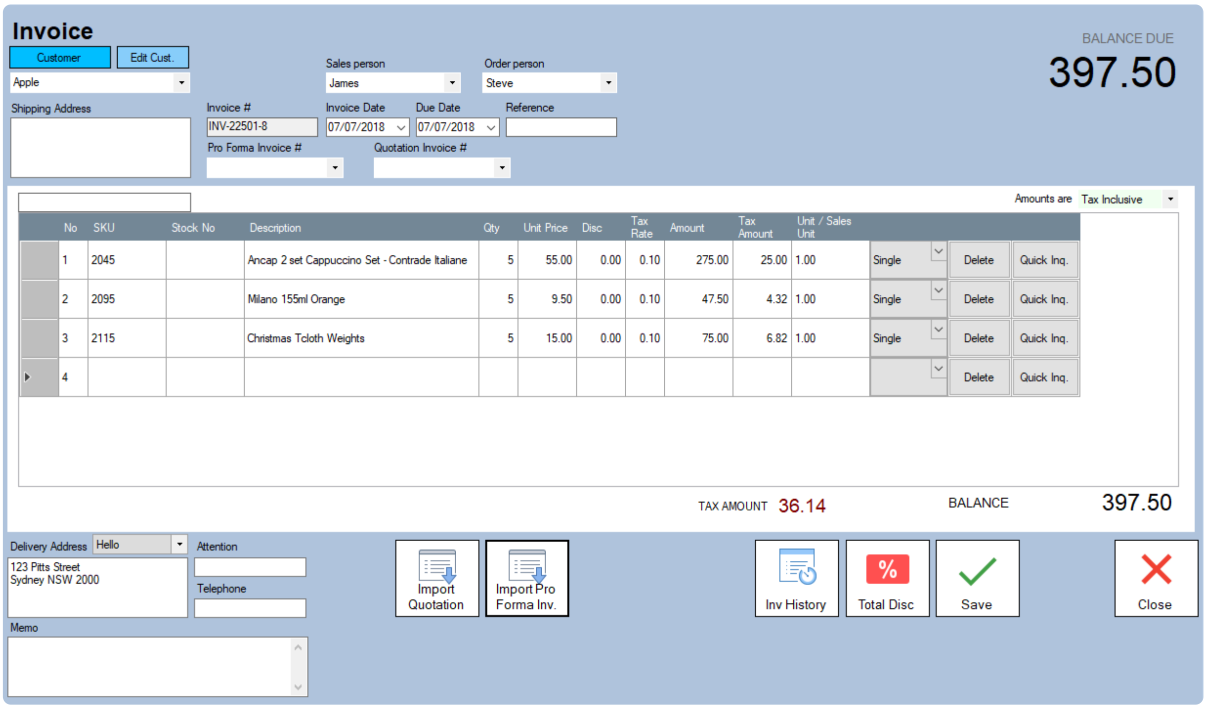
7.8. Sizes

7.9. Colors

7.10. Styles

8. Sale Invoice

An Invoice is usually created when you deliver the items or services the customer ordered. Invoices can be open (unpaid), closed (paid).



Invoice

Customer: Apple
Sales person: James
Order person: Steve
BALANCE DUE 397.50
Shipping Address:
Invoice #: INV-22501-8
Invoice Date: 07/07/2018
Due Date: 07/07/2018
Reference:
Pro Forma Invoice #:
Quotation Invoice #:
Amounts are: Tax Inclusive

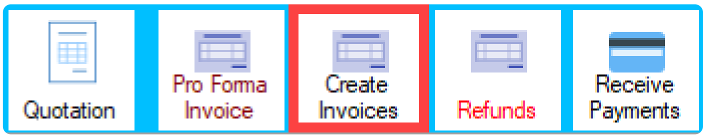
No	SKU	Stock No	Description	Qty	Unit Price	Disc	Tax Rate	Amount	Tax Amount	Unit / Sales Unit			
1	2045		Ancap 2 set Cappuccino Set - Contrade Italiane	5	55.00	0.00	0.10	275.00	25.00	1.00	Single	Delete	Quick Inq.
2	2095		Milano 155ml Orange	5	9.50	0.00	0.10	47.50	4.32	1.00	Single	Delete	Quick Inq.
3	2115		Christmas Tcloth Weights	5	15.00	0.00	0.10	75.00	6.82	1.00	Single	Delete	Quick Inq.
4												Delete	Quick Inq.

TAX AMOUNT 36.14
BALANCE 397.50

Delivery Address: Hello
123 Pitts Street
Sydney NSW 2000
Attention:
Telephone:
Memo:

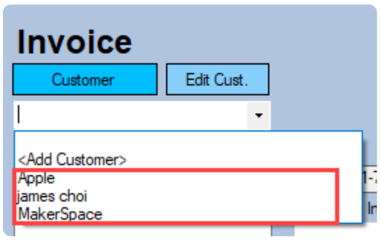
8.1. Create Invoice

Open the ‘Invoice’ Screen


Quotation
Pro Forma Invoice
Create Invoices
Refunds
Receive Payments

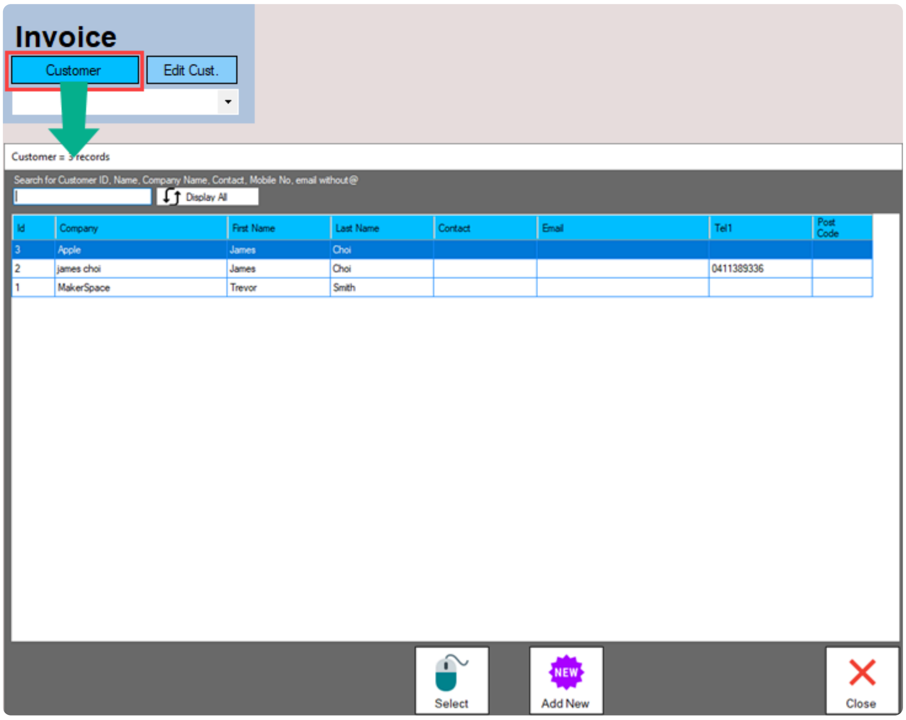
Select a Customer

1. Select a customer from the customer drop-down menu


Invoice
Customer
Edit Cust.
<Add Customer>
Apple
james choi
MakerSpace

If you want to add new customer, just select ‘**Add Customer**’

2. Select a customer from the customer list screen


Invoice
Customer
Edit Cust.
Display All
Select
Add New
Close

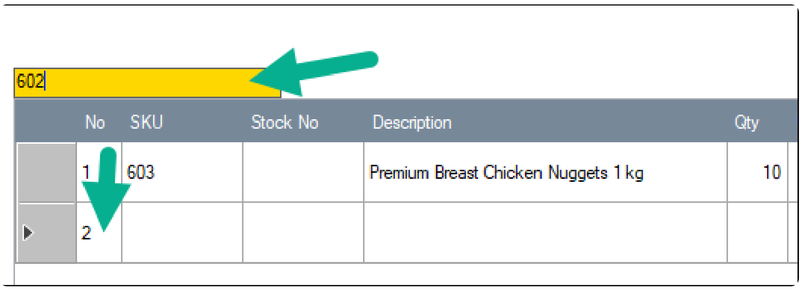
Customer = 3 records

Search for Customer ID, Name, Company Name, Contact, Mobile No, email without@

Id	Company	First Name	Last Name	Contact	Email	Tel1	Post Code
3	Apple	James	Choi				
2	james choi	James	Choi			0411389336	
1	MakerSpace	Trevor	Smith				

Add items

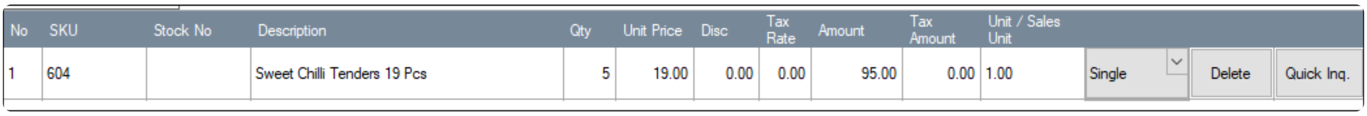
1. Type the item SKU in the code box and press ‘ENTER’ or click the ‘No’ column on the empty row



602

No	SKU	Stock No	Description	Qty
1	603		Premium Breast Chicken Nuggets 1 kg	10
2				

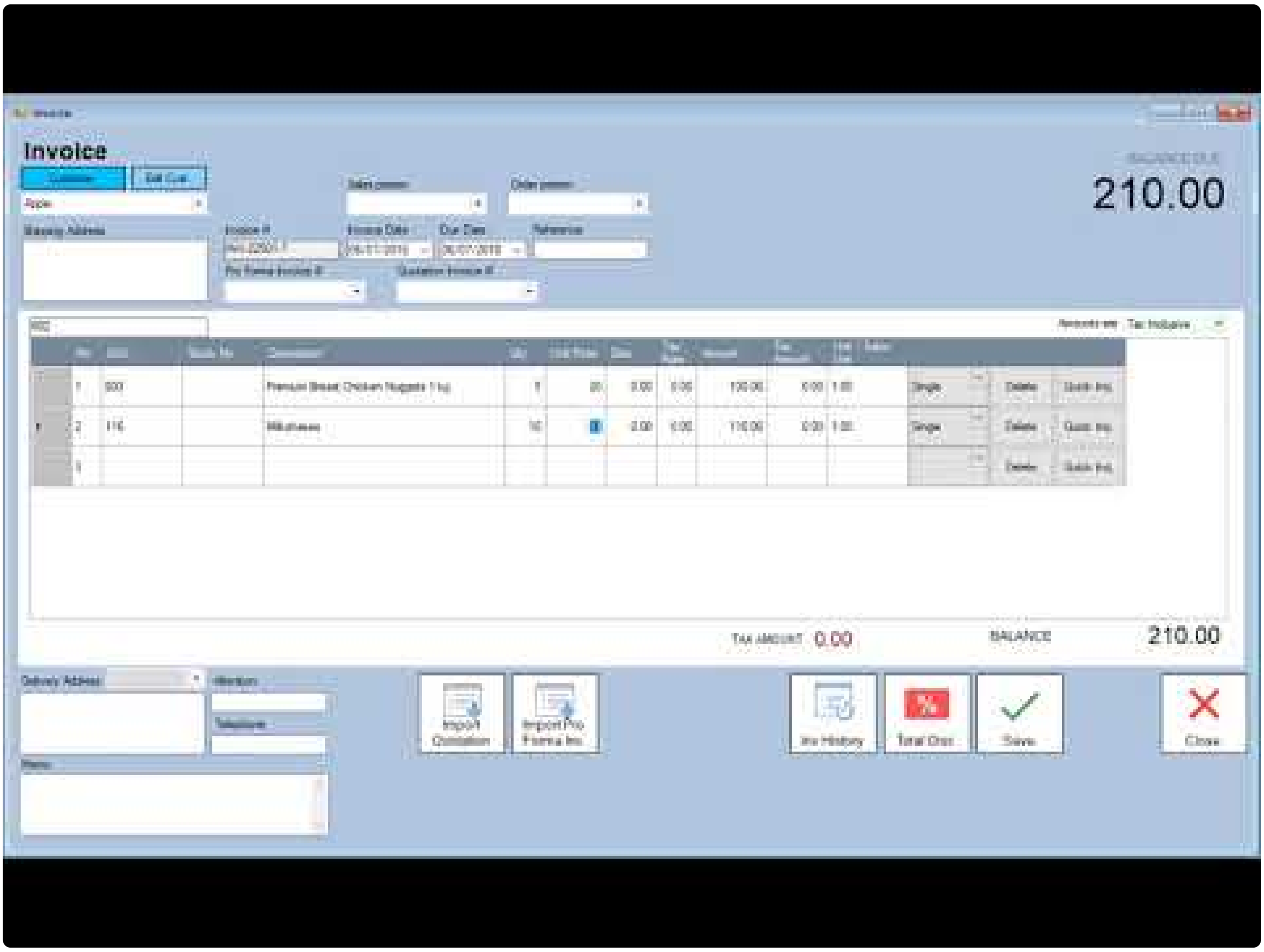
2. Change item details



No	SKU	Stock No	Description	Qty	Unit Price	Disc	Tax Rate	Amount	Tax Amount	Unit / Sales Unit			
1	604		Sweet Chilli Tenders 19 Pcs	5	19.00	0.00	0.00	95.00	0.00	1.00	Single	Delete	Quick Inq.

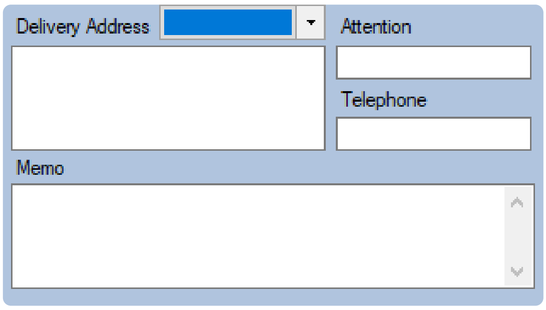
No	Row number.
SKU	Unique identifier created for each item and used to generate barcodes.
Stock No	item reference.
Description	Description of item.
Qty	The quantity of the item.
Unit Price	The amount you are charging for one quantity of this item. If you want to set the price as 'tax exclusive', change the 'Amounts are' option to Tax Exclusive in the top right hand corner of the grid.
Disc	[Optional] The volume of discount as a fraction (eg. 0.1 = 10% discount).
Tax Rate	Tax Rate. (0.1 is 10% tax rate).
Amount	The total price of the item (inclusive of quantity, discount amount, and tax amount).
Tax Amount	The total tax amount for the item.
Unit/Sales Unit	The quantity amount that will decrease when you sell item. Eg. if the sales unit qty is '12' and the selling qty is '2', total stock quantity will be decreased by 24.
Single	Sales Unit name. If you select Single, total stock quantity will be decreased by 1. If you select Box, total stock quantity will be decreased by the box quantity.
Delete	Removes the item from the grid
Quick Inq.	(Quick Inquiry) Searches the item sale history for the invoice customer.

Click the column you want to change and type the number. Then press 'Enter' key.

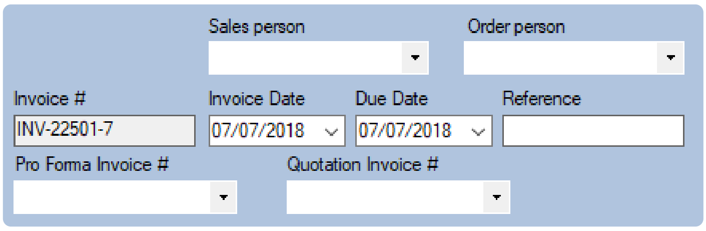

Invoice
210.00
TAX AMOUNT 0.00
BALANCE 210.00
Import Quotation
Import Pro Forma Inv.
Inv History
Total Disc
Save
Close

https://www.youtube.com/embed/-Q_Zg72sMCQ?rel=0

Enter additional information about the sale


Delivery Address
Attention
Telephone
Memo

Delivery Address	If the delivery address is different to the billing address, you can use this address for delivery.
Attention	The name of the person who is supposed to receive the delivery
Telephone	Telephone number for the delivery.
Memo	Memo for the invoice.

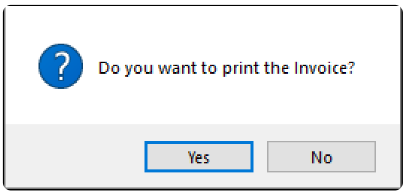

Sales person
Order person
Pro Forma Invoice #
Quotation Invoice #

Invoice # INV-22501-7
Invoice Date 07/07/2018
Due Date 07/07/2018
Reference

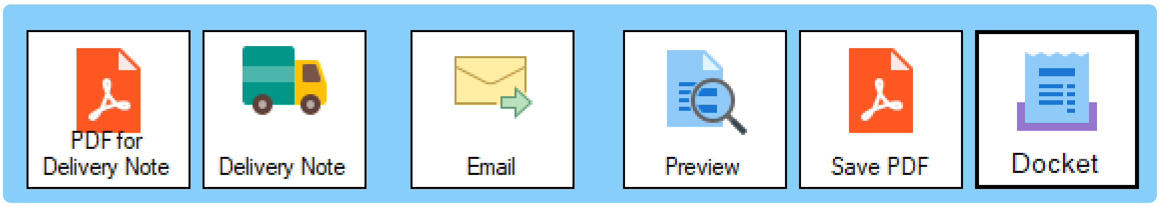
Sales person	The name of the salesperson.
Order person	The name of the order person.
Pro Forma Invoice #	List of Pro Forma Invoice no's that have been imported.
Quotation Invoice #	List of Quotation invoice no's that have been imported.
Reference	Reference for the invoice.

Print, send or save it as a PDF

After saving the invoice a message box will popup asking If you want to print, send email or save it as a PDF.
Otherwise, if you open an existing invoice and wish to print, click the 'Send To' button.


Do you want to print the Invoice?

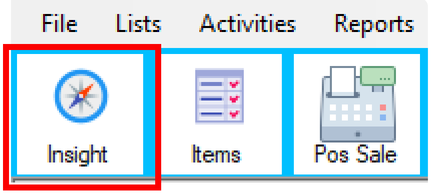
Print options

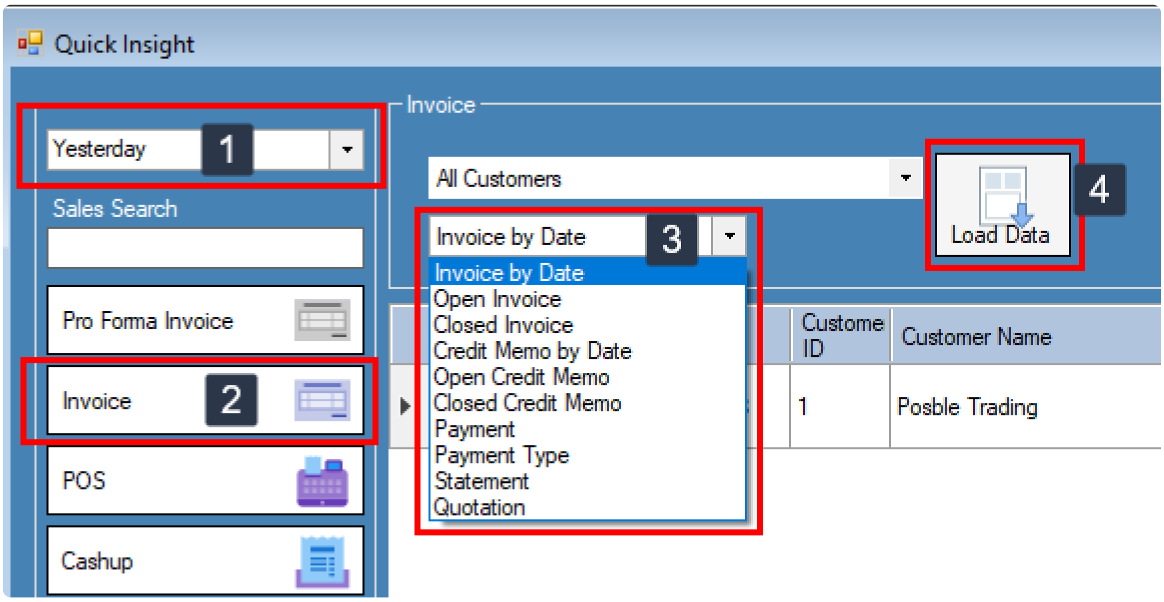

PDF for Delivery Note
Delivery Note
Email
Preview
Save PDF
Docket

PDF for Delivery Note	Save delivery note as a PDF.
Delivery Note	Show preview delivery note.
Email	Send email. Click here for email setup instruction
Preview	Show preview invoice.
Save PDF	Save invoice as a PDF.
Docket	Print invoice to docket printer. Click here for docket printer setup instruction

8.2. Find an Invoice

Open the ‘Quick Insight’ screen


File
Lists
Activities
Reports
Insight
Items
Pos Sale

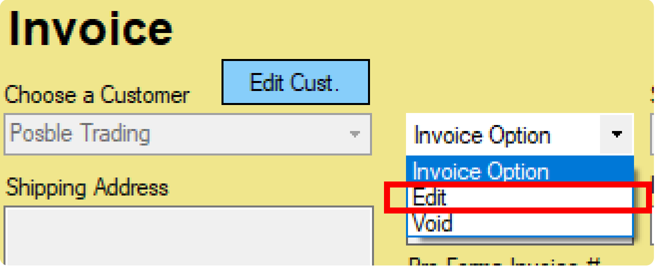

Quick Insight
Yesterday
1
Sales Search
Pro Forma Invoice
Invoice
2
POS
Cashup
Invoice
All Customers
Invoice by Date
3
Invoice by Date
Open Invoice
Closed Invoice
Credit Memo by Date
Open Credit Memo
Closed Credit Memo
Payment
Payment Type
Statement
Quotation
Load Data
4
Custome ID
Customer Name
1
Posble Trading

Step 1 : Select a date period
Step 2 : Click the ‘Invoice’ button
Step 3 : Select an invoice option that you want to look up
Step 4 : Click the ‘Load Data’ button

✻ 1. ‘Invoice by Date’ includes all the invoices in that specific period.
2. You can also filter by customer from the customer drop-down menu.

8.3. Edit or Void Invoice

From the 'Invoice Option' drop-down menu, select 'Edit' to edit the invoice or 'Void' to void the invoice.

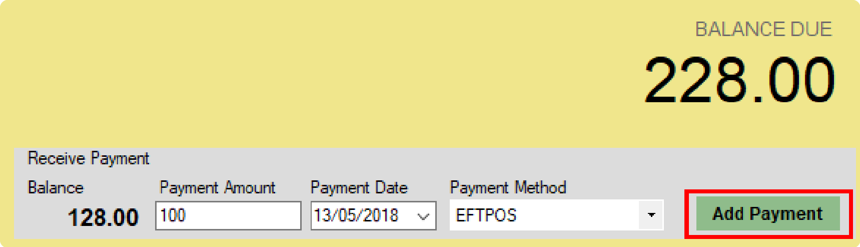

Invoice
Choose a Customer
Edit Cust.
Posble Trading
Shipping Address
Invoice Option
Invoice Option
Edit
Void

✻ If you can't see the 'Invoice Option' drop-down menu, there are two reasons.
(1) Payment has already been made for this Invoice even if it is only partial payment.
(2) The Invoice has generated a 'Rebate Credit Memo' automatically. 'Rebate Credit Memo' is an optional module. Please contact us if you are interested in.

8.4. Add Payment to Invoice

When customers make payments for invoices, you can record the payments in the ‘Receive Payments’ screen for one or more invoices or you can record the payment in the ‘Invoice’ screen for an outstanding invoice.

Apply the payment to an open invoice in the Invoice screen.

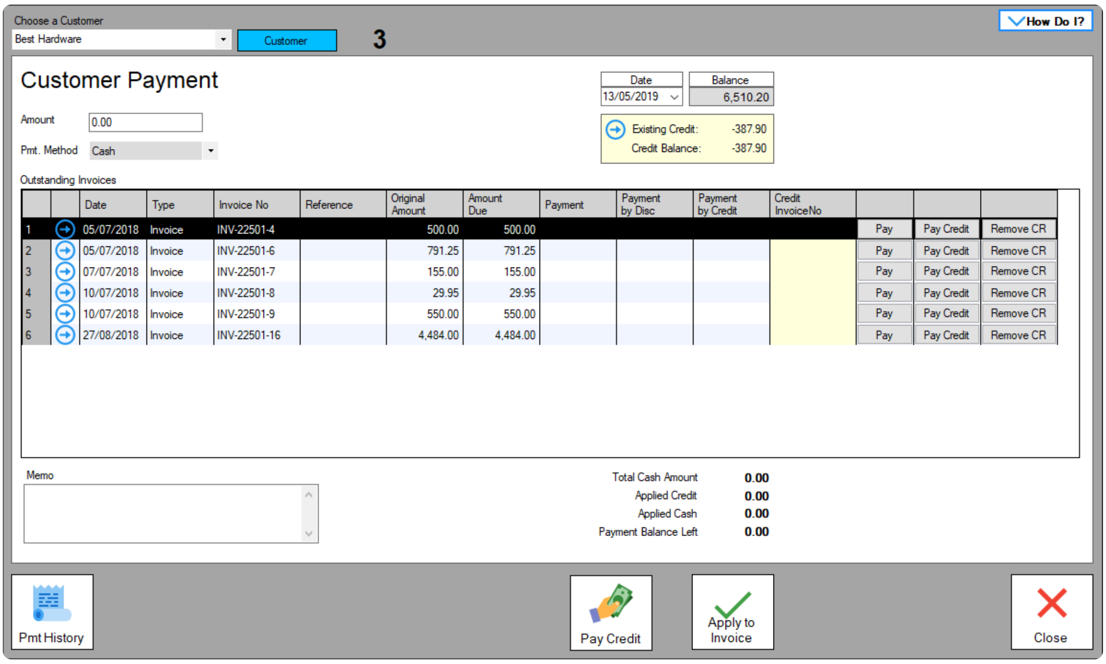


BALANCE DUE
228.00

Receive Payment

Balance	Payment Amount	Payment Date	Payment Method
128.00	100	13/05/2018	EFTPOS

Apply the payment to one or more open invoices.



Choose a Customer: Best Hardware

Customer Payment

Amount: 0.00
Pmt. Method: Cash

Date: 13/05/2019
Balance: 6,510.20

Existing Credit: -387.90
Credit Balance: -387.90

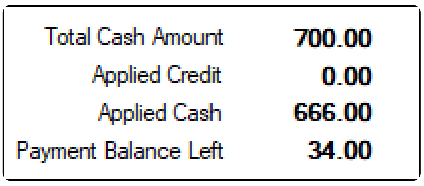
Outstanding Invoices

		Date	Type	Invoice No	Reference	Original Amount	Amount Due	Payment	Payment by Disc	Payment by Credit	Credit InvoiceNo			
1	→	05/07/2018	Invoice	INV-22501-4		500.00	500.00					Pay	Pay Credit	Remove CR
2	→	05/07/2018	Invoice	INV-22501-6		791.25	791.25					Pay	Pay Credit	Remove CR
3	→	07/07/2018	Invoice	INV-22501-7		155.00	155.00					Pay	Pay Credit	Remove CR
4	→	10/07/2018	Invoice	INV-22501-8		29.95	29.95					Pay	Pay Credit	Remove CR
5	→	10/07/2018	Invoice	INV-22501-9		550.00	550.00					Pay	Pay Credit	Remove CR
6	→	27/08/2018	Invoice	INV-22501-16		4,484.00	4,484.00					Pay	Pay Credit	Remove CR

Memo

Total Cash Amount	0.00
Applied Credit	0.00
Applied Cash	0.00
Payment Balance Left	0.00

1. Select the Customer.
2. Type the amount received next to ‘Amount’.
3. Select the payment method.
4. Enter the amounts you want to apply to one or more invoices in the ‘Payment’ column. If you click the ‘Pay’ button, invoice’s due amount will be filled automatically.



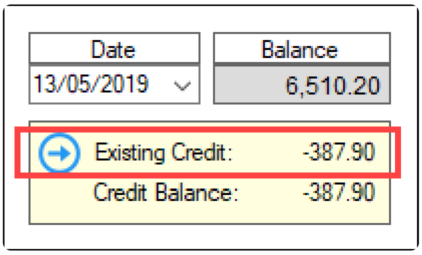
Total Cash Amount	700.00
Applied Credit	0.00
Applied Cash	666.00
Payment Balance Left	34.00

Total	Total payment amount made by the customer.

Cash Amount	
Applied Credit	Total amount of credit currently being applied to invoices.
Applied Cash	Total amount of cash currently being applied to invoices.
Payment Balance Left	The amount of cash that is yet to be applied to invoices calculated from the ‘Total Cash Amount’ minus the ‘Applied Cash’ amount. The ‘Payment Balance Left’ must be zero before you can record the transaction.

8.5. Handle a Credit Balance

There are two ways to handle the credit balance.
First one is applying the credit balance to specific invoices. The other one is paying the money to the customer directly.

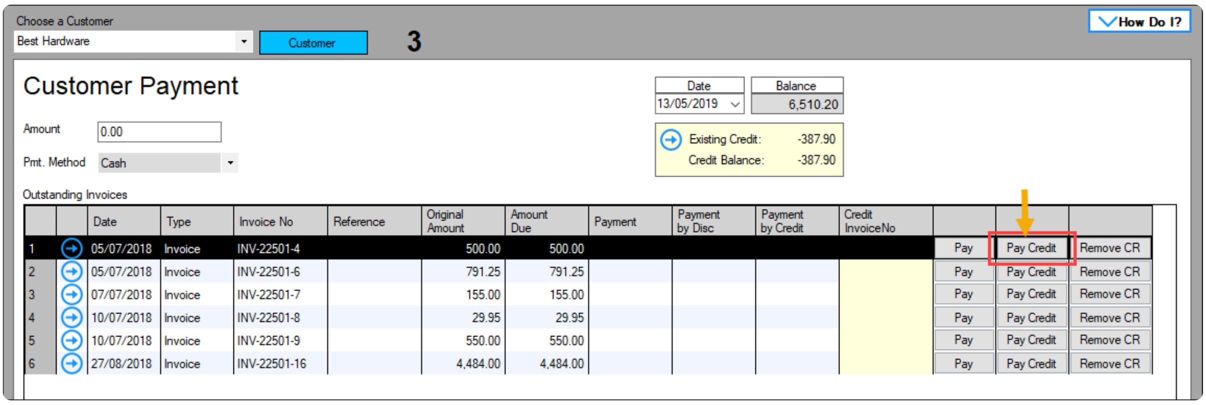


Date	Balance
13/05/2019	6,510.20

Existing Credit: -387.90
Credit Balance: -387.90

Applying the credit balance to specific invoices

1. Select the Customer.
2. Click the Pay Credit Button.



Choose a Customer: Best Hardware

Customer Payment

Amount: 0.00
Pmt. Method: Cash

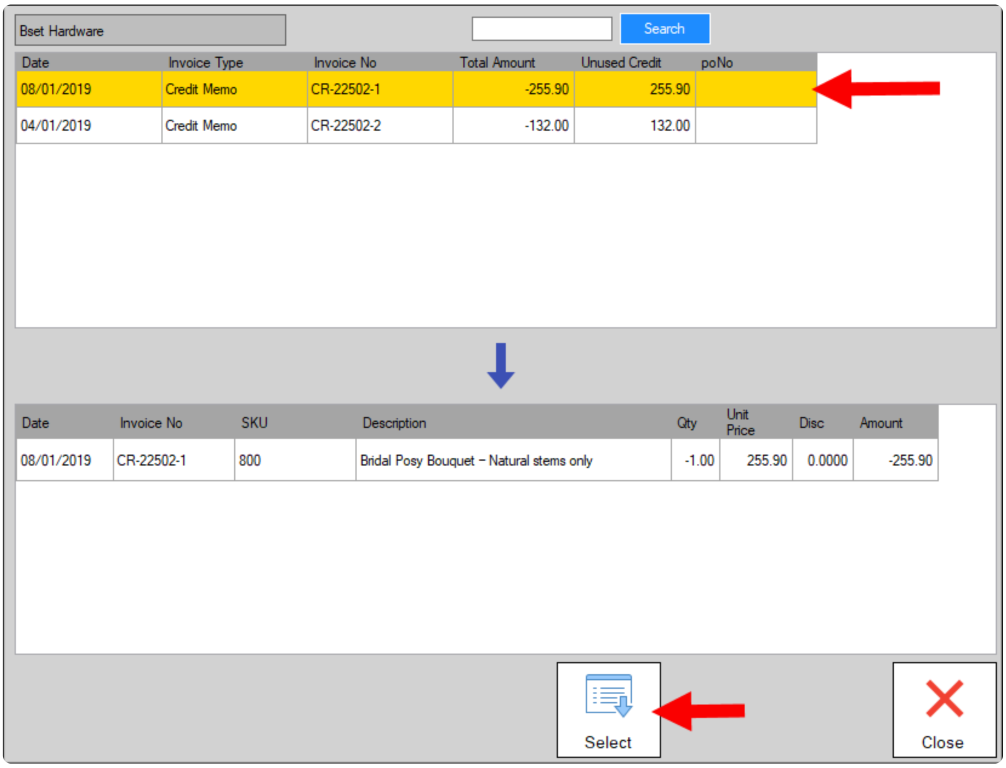
Date	Balance
13/05/2019	6,510.20

Existing Credit: -387.90
Credit Balance: -387.90

Outstanding Invoices

	Date	Type	Invoice No	Reference	Original Amount	Amount Due	Payment	Payment by Disc	Payment by Credit	Credit InvoiceNo
1	05/07/2018	Invoice	INV-22501-4		500.00	500.00				
2	05/07/2018	Invoice	INV-22501-6		791.25	791.25				
3	07/07/2018	Invoice	INV-22501-7		155.00	155.00				
4	10/07/2018	Invoice	INV-22501-8		29.95	29.95				
5	10/07/2018	Invoice	INV-22501-9		550.00	550.00				
6	27/08/2018	Invoice	INV-22501-16		4,484.00	4,484.00				

3. Select the credit invoice that you want to pay to the invoice

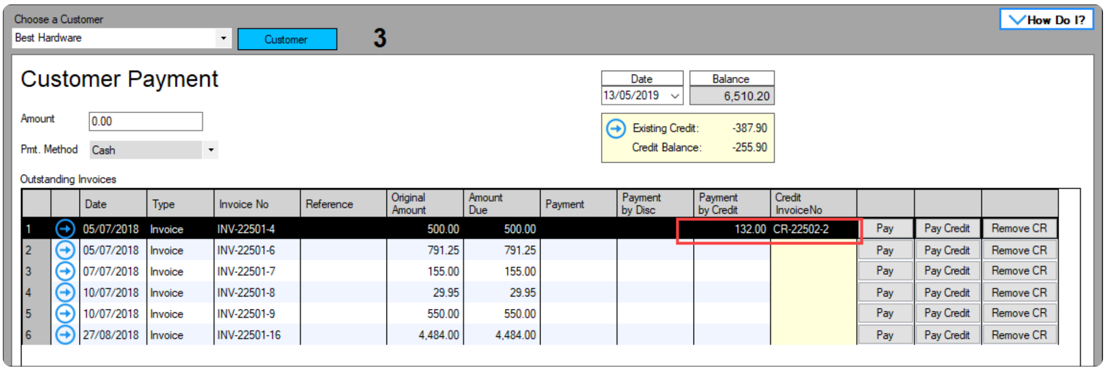


Bset Hardware

Date	Invoice Type	Invoice No	Total Amount	Unused Credit	poNo
08/01/2019	Credit Memo	CR-22502-1	-255.90	255.90	
04/01/2019	Credit Memo	CR-22502-2	-132.00	132.00	

Date	Invoice No	SKU	Description	Qty	Unit Price	Disc	Amount
08/01/2019	CR-22502-1	800	Bridal Posy Bouquet – Natural stems only	-1.00	255.90	0.0000	-255.90

After applied the credit invoice, you can see the credit invoice no. And credit balance will reduce



Choose a Customer: Best Hardware

Customer Payment

Amount: 0.00

Pmt. Method: Cash

Date: 13/05/2019

Balance: 6,510.20

Existing Credit: -387.90

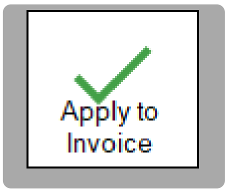
Credit Balance: -255.90

Outstanding Invoices

	Date	Type	Invoice No	Reference	Original Amount	Amount Due	Payment	Payment by Disc	Payment by Credit	Credit InvoiceNo			
1	05/07/2018	Invoice	INV-22501-4		500.00	500.00			132.00	CR-22502-2	Pay	Pay Credit	Remove CR
2	05/07/2018	Invoice	INV-22501-6		791.25	791.25					Pay	Pay Credit	Remove CR
3	07/07/2018	Invoice	INV-22501-7		155.00	155.00					Pay	Pay Credit	Remove CR
4	10/07/2018	Invoice	INV-22501-8		29.95	29.95					Pay	Pay Credit	Remove CR
5	10/07/2018	Invoice	INV-22501-9		550.00	550.00					Pay	Pay Credit	Remove CR
6	27/08/2018	Invoice	INV-22501-16		4,484.00	4,484.00					Pay	Pay Credit	Remove CR

Remove CR button will remove the applied credit payment.

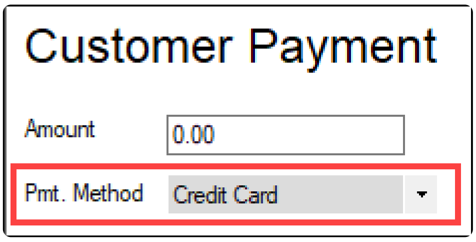
4. Click the Apply Invoice button



Paying the money to the customer

1. Select the Customer.

2. Select the payment type.

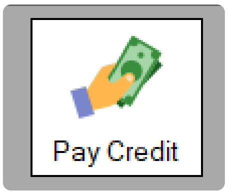


Customer Payment

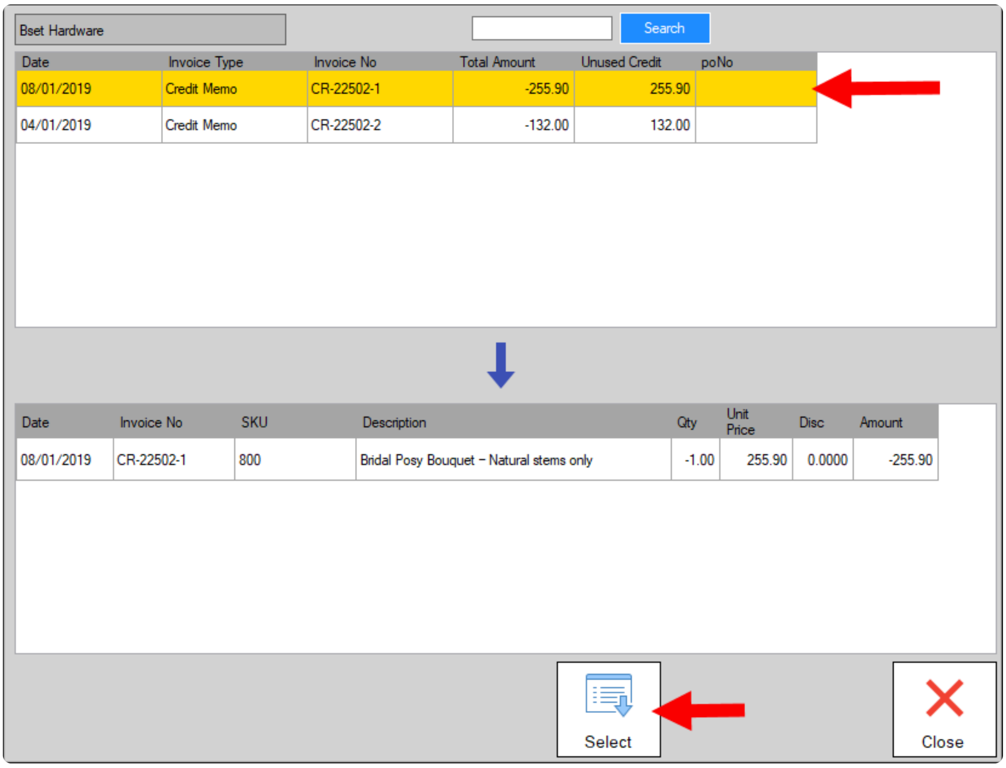
Amount: 0.00

Pmt. Method: Credit Card

3. Click the ‘Pay Credit’ button.



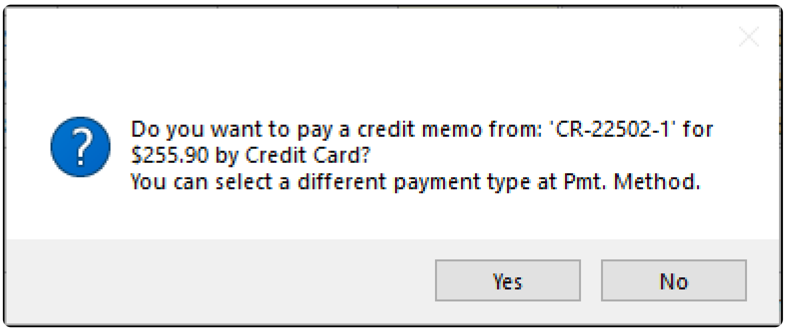
4. Select the credit invoice that you want to pay to the customer



Date	Invoice Type	Invoice No	Total Amount	Unused Credit	poNo
08/01/2019	Credit Memo	CR-22502-1	-255.90	255.90	
04/01/2019	Credit Memo	CR-22502-2	-132.00	132.00	

Date	Invoice No	SKU	Description	Qty	Unit Price	Disc	Amount
08/01/2019	CR-22502-1	800	Bridal Posy Bouquet – Natural stems only	-1.00	255.90	0.0000	-255.90

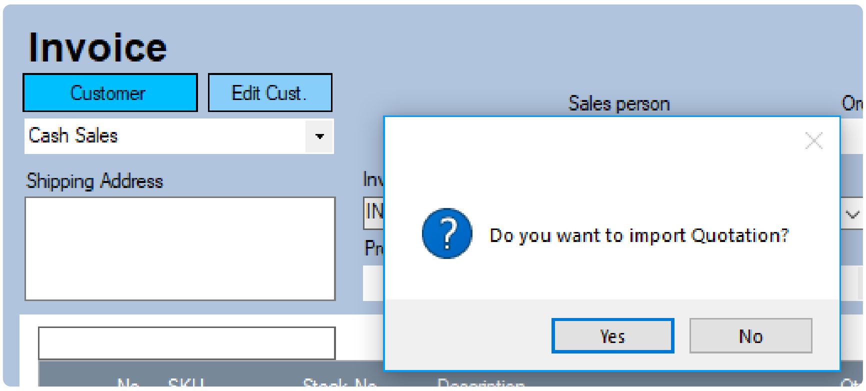
5. Confirm the credit pay



Do you want to pay a credit memo from: 'CR-22502-1' for $255.90 by Credit Card?
You can select a different payment type at Pmt. Method.

8.6. Import Quotation

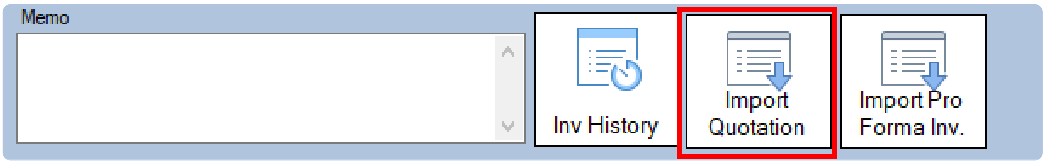
When you select the customer, BLUETILL will automatically check for any open quotations.



Do you want to import Quotation?

Invoice
Customer
Edit Cust.
Cash Sales
Shipping Address
Sales person
Yes
No

Click the 'Import Quotation' button to import any open quotations.

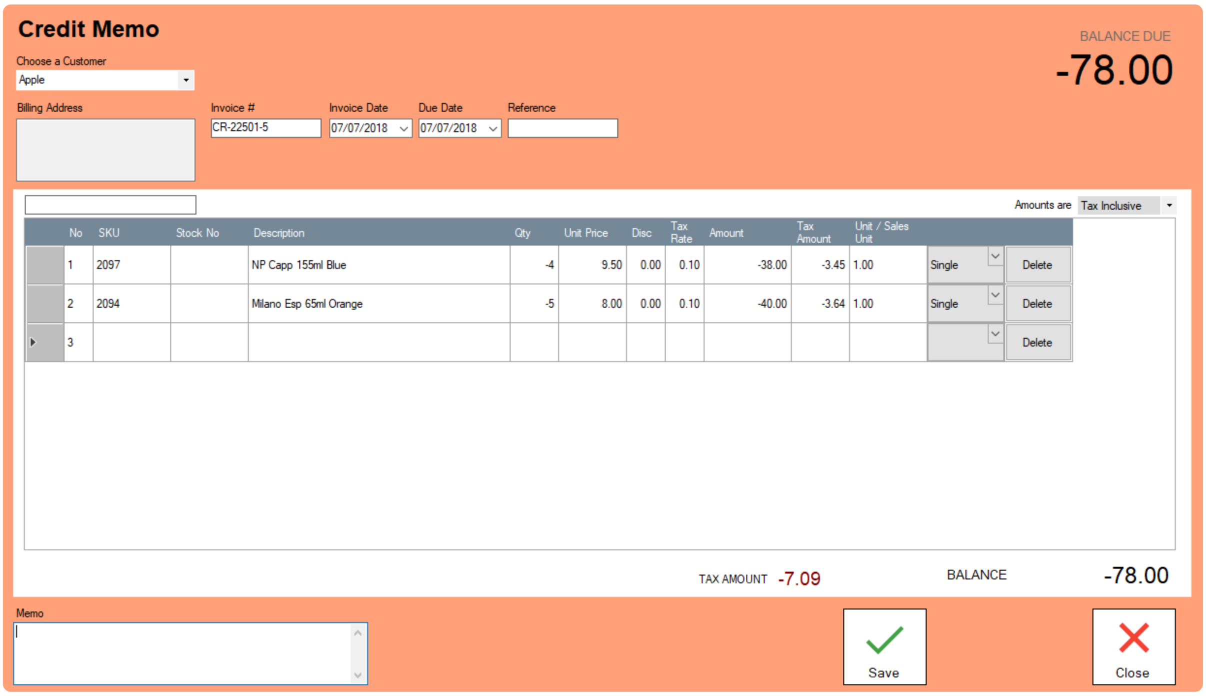


Memo
Inv History
Import Quotation
Import Pro Forma Inv.

✻ When importing a quotation, you can change item quantities or remove items. Remaining quantities or items can be imported later.

9. Refund Invoice / Credit Memo

Customer credit is considered money that you owe a customer which can be used as payment for the customer for their invoices.
Credit is gained when you record a refund transaction/'Credit Memo'.
This credit amount can then be refunded as Cash, Bank Transfer, etc to the Customer OR can be settled by paying for unpaid Invoices that the customer may have.



Credit Memo

Choose a Customer: Apple

Billing Address:

Invoice #: CR-22501-5

Invoice Date: 07/07/2018

Due Date: 07/07/2018

Reference:

BALANCE DUE -78.00

Amounts are: Tax Inclusive

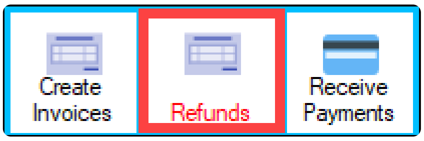
No	SKU	Stock No	Description	Qty	Unit Price	Disc	Tax Rate	Amount	Tax Amount	Unit / Sales Unit		
1	2097		NP Capp 155ml Blue	-4	9.50	0.00	0.10	-38.00	-3.45	1.00	Single	Delete
2	2094		Milano Esp 65ml Orange	-5	8.00	0.00	0.10	-40.00	-3.64	1.00	Single	Delete
3												Delete

TAX AMOUNT -7.09

BALANCE -78.00

Memo:

Open Credit Memo Screen



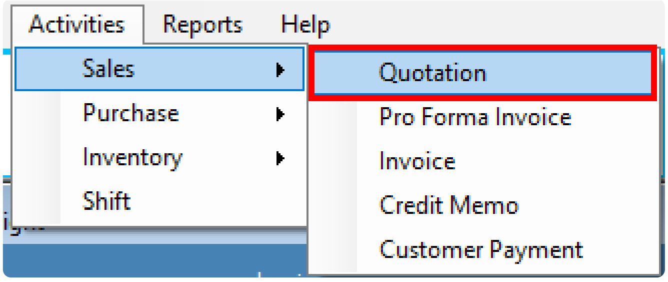
1. Select Customer.
2. Enter the items or services you are reversing.
3. Change item details.
Functions are similar with invoice. Click here for check

Settling Credits

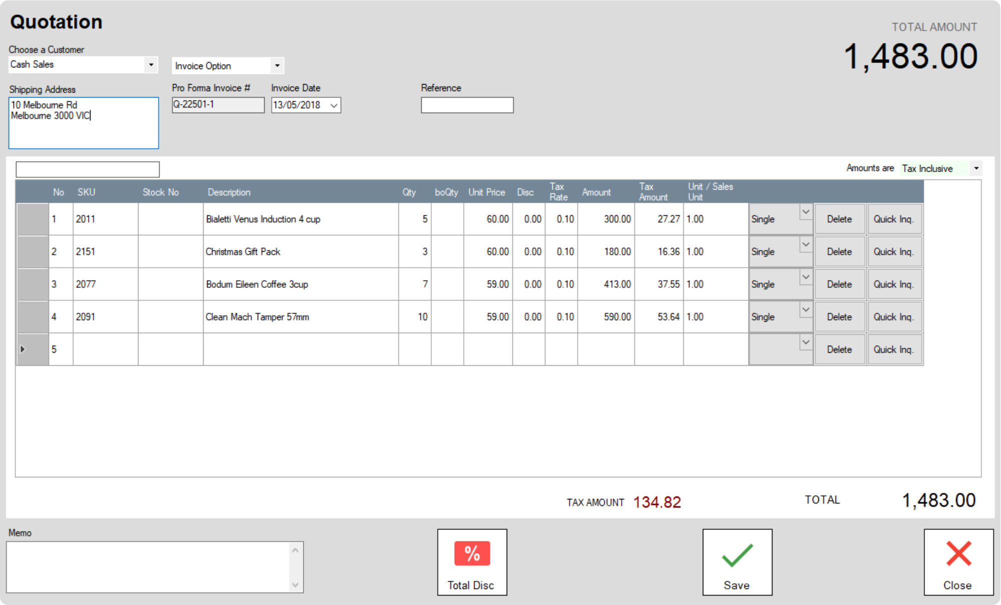
You can choose to settle customer credit in the following ways:
1. Apply the credit to an open invoice. You can pay for one or more of the customer's open invoices using the credit.
2. Refund the credit. If the customer does not have any open invoices, you can record a refund payment for the credit amount.
Click here for instruction

10. Quotation

Select Quotation under Activities > Sales Tab


Activities
Reports
Help
Sales
Purchase
Inventory
Shift
Quotation
Pro Forma Invoice
Invoice
Credit Memo
Customer Payment

A document sent to a potential customer offering to sell goods or services at a certain price, under specified conditions.



Quotation

TOTAL AMOUNT 1,483.00

Choose a Customer: Cash Sales

Invoice Option

Shipping Address: 10 Melbourne Rd
Melbourne 3000 VIC

Pro Forma Invoice #: Q-22501-1

Invoice Date: 13/05/2018

Reference:

Amounts are: Tax Inclusive

No	SKU	Stock No	Description	Qty	boQty	Unit Price	Disc	Tax Rate	Amount	Tax Amount	Unit / Sales Unit			
1	2011		Bialetti Venus Induction 4 cup	5		60.00	0.00	0.10	300.00	27.27	1.00	Single	Delete	Quick Inq.
2	2151		Christmas Gift Pack	3		60.00	0.00	0.10	180.00	16.36	1.00	Single	Delete	Quick Inq.
3	2077		Bodum Eileen Coffee 3cup	7		59.00	0.00	0.10	413.00	37.55	1.00	Single	Delete	Quick Inq.
4	2091		Clean Mach Tamper 57mm	10		59.00	0.00	0.10	590.00	53.64	1.00	Single	Delete	Quick Inq.
5													Delete	Quick Inq.

TAX AMOUNT 134.82

TOTAL 1,483.00

Memo:

Total Disc
Save
Close

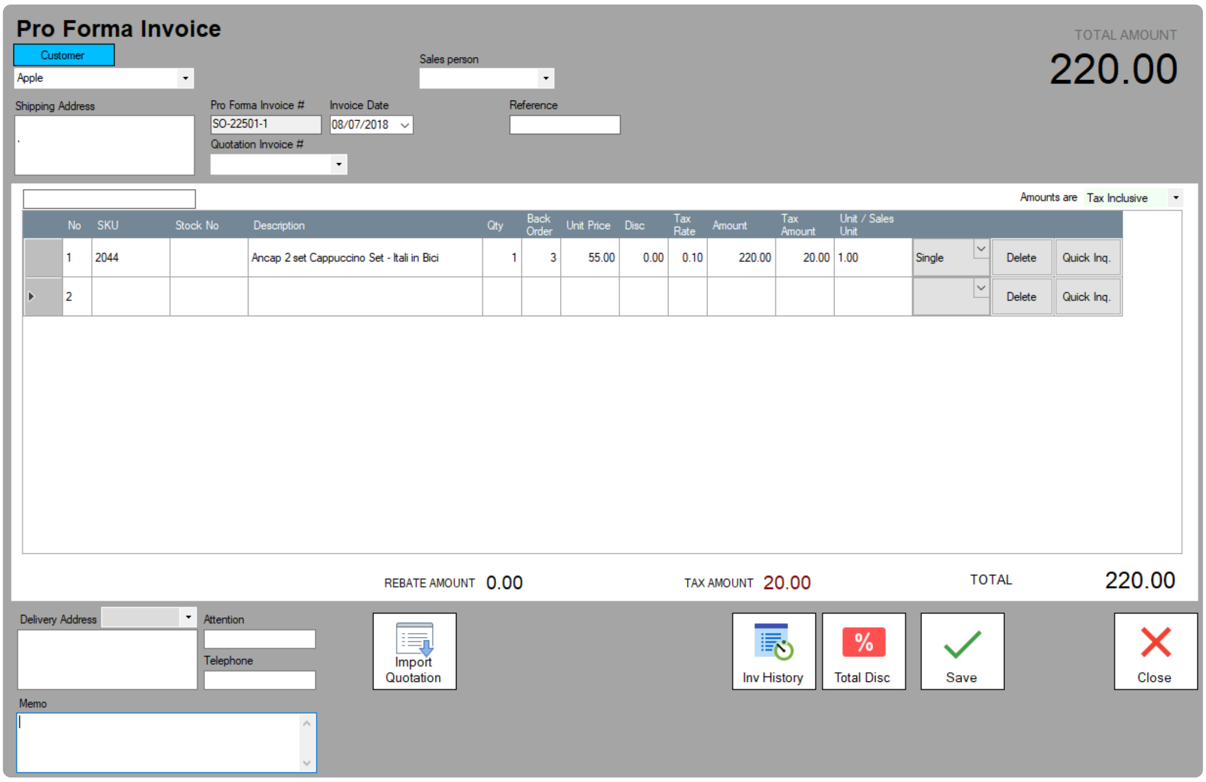
Functions are similar with invoice. [Click here to check]

11. Pro Forma Invoice

A ‘Pro forma Invoice’ otherwise known as a ‘Sales Order’ is a document that a seller sends to a prospective customer to outline the details and cost of a product or service. A Pro forma invoice is sent before the work is done, so it isn’t a “true” invoice but instead a commitment of goods or services that have yet to be delivered.

What is the purpose of a pro forma invoice?

Pro forma Invoices are used if you need to produce a document to a customer for products or services that you are yet to deliver. The purpose is to make sure the seller and customer are on the same page about their agreement, most importantly the price of the products or services.



Pro Forma Invoice

Customer: Apple

Sales person:

TOTAL AMOUNT 220.00

Shipping Address:

Pro Forma Invoice #: SO-22501-1

Invoice Date: 08/07/2018

Reference:

Quotation Invoice #:

Amounts are: Tax Inclusive

No	SKU	Stock No	Description	Qty	Back Order	Unit Price	Disc	Tax Rate	Amount	Tax Amount	Unit / Sales Unit			
1	2044		Ancap 2 set Cappuccino Set - Itali in Bici	1	3	55.00	0.00	0.10	220.00	20.00	1.00	Single	Delete	Quick Inq.
2													Delete	Quick Inq.

REBATE AMOUNT 0.00

TAX AMOUNT 20.00

TOTAL 220.00

Delivery Address:

Attention:

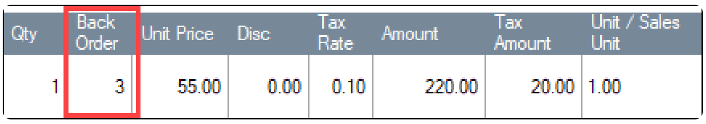
Telephone:

Memo:

Functions are similar with invoice. [Click here to check]

Back order handling

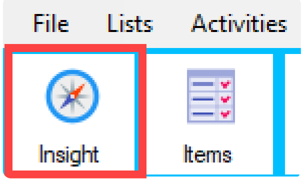
A ‘back order’ is the quantity of the item to be placed on backorder.



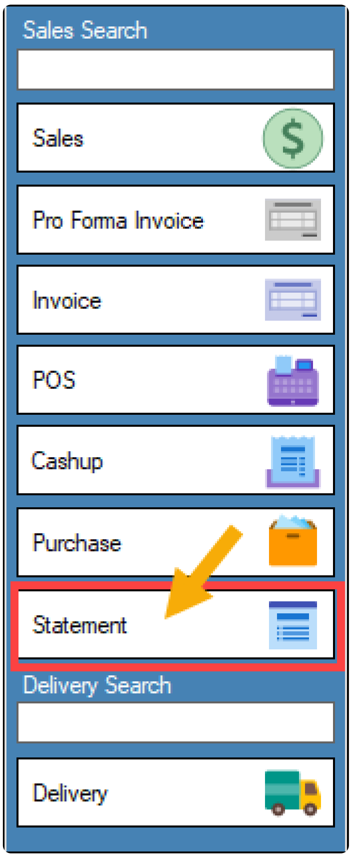
Qty	Back Order	Unit Price	Disc	Tax Rate	Amount	Tax Amount	Unit / Sales Unit
1	3	55.00	0.00	0.10	220.00	20.00	1.00

12. Statement

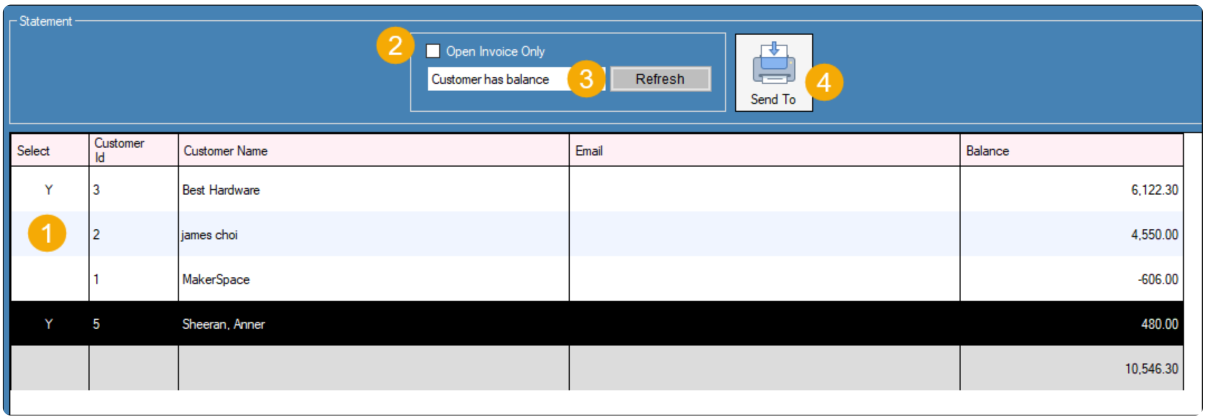
Open Quick Insight


File
Lists
Activities
Insight
Items

1. Open Statement Screen


Sales Search
Sales
Pro Forma Invoice
Invoice
POS
Cashup
Purchase
Statement
Delivery Search
Delivery

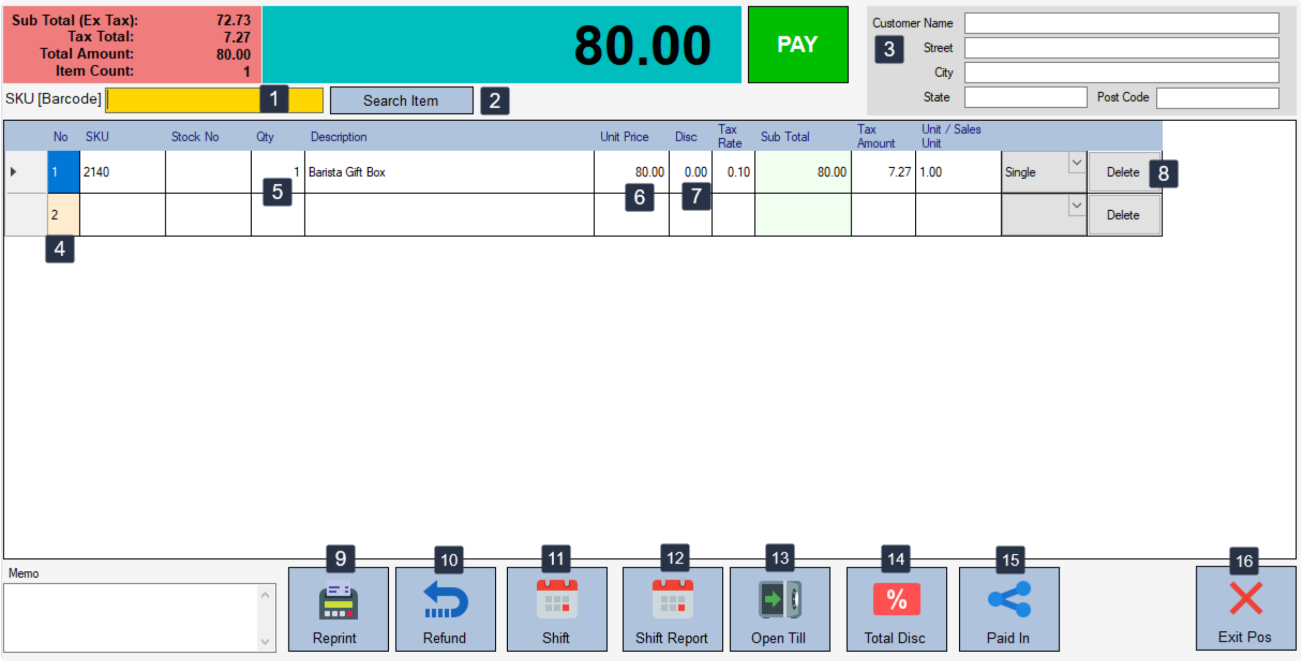
2. Select Customer for Printing or Email


Statement
2
☐ Open Invoice Only
Customer has balance
3
Refresh
Send To
4
1

Select	Customer Id	Customer Name	Email	Balance
Y	3	Best Hardware		6,122.30
	2	james choi		4,550.00
	1	MakerSpace		-606.00
Y	5	Sheeran, Anner		480.00
				10,546.30

Select	Click to select the customer. If you click it, the column has ‘Y’. If you click again, the column will be empty.
Open Invoice Only	If you want to include open invoice only, please select this option.
Customer has balance	If you want to see all customer, please change this option.
Send To	Print or send email to customer

13. Pos Sale



Sub Total (Ex Tax): 72.73
Tax Total: 7.27
Total Amount: 80.00
Item Count: 1

80.00

No	SKU	Stock No	Qty	Description	Unit Price	Disc	Tax Rate	Sub Total	Tax Amount	Unit / Sales Unit		
1	2140		1	Barista Gift Box	80.00	0.00	0.10	80.00	7.27	1.00	Single	Delete
2												Delete

PAY
Customer Name
Street
City
State
Post Code
SKU [Barcode]
Search Item
Memo
Reprint
Refund
Shift
Shift Report
Open Till
Total Disc
Paid In
Exit Pos
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16

SKU, Barcode	Scan or type the barcode.
Search Item	Open search item screen.
Customer Name	Save customer details on invoice. it doesn’t register details on customer list.
No	Row number.
Qty	Quantity
Unit Price	GST included selling price.
Delete button	Remove item.
Single	Sales unit name click here for detail
Reprint	Reprint receipt
Refund	Refund item
Shift	Open & close shift click here for detail
Shift Report	Browsing shift history
Open Till	Open cash drawer without sale
Total Disc	Apply total discount for this sale
Paid In	Open paid in & paid out screen

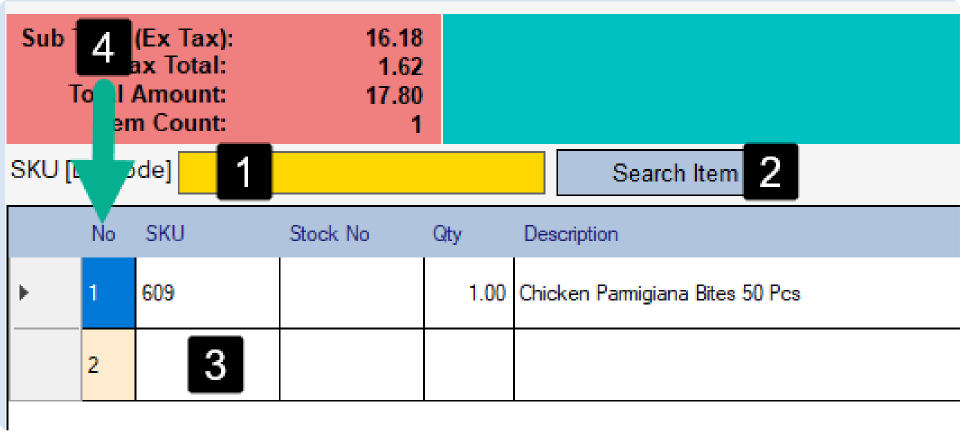
13.1. Starting & Ending Your Day

One of the first steps to starting your day is to open a shift. The shift must be open before cashiers can run any transactions at the register.
Click Here for instruction

When your business closes each day, close the shift in BLUETILL to end your day. After the shift is closed, cashiers cannot run any more transactions.
Click Here for instruction

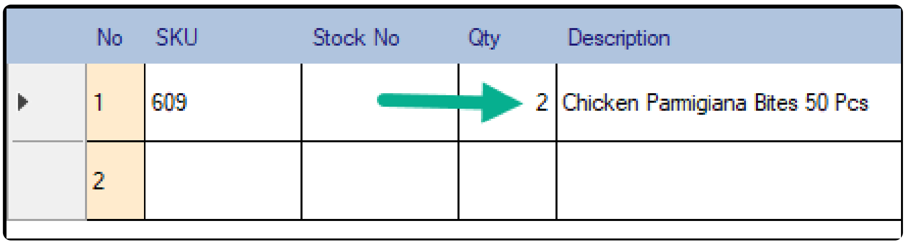
13.2. Sale Item

1. Select item


Sub Total (Ex Tax): 16.18
Tax Total: 1.62
Total Amount: 17.80
Item Count: 1
SKU [Barcode]
Search Item
1
2
3
4
No
SKU
Stock No
Qty
Description
1
609
1.00
Chicken Parmigiana Bites 50 Pcs
2

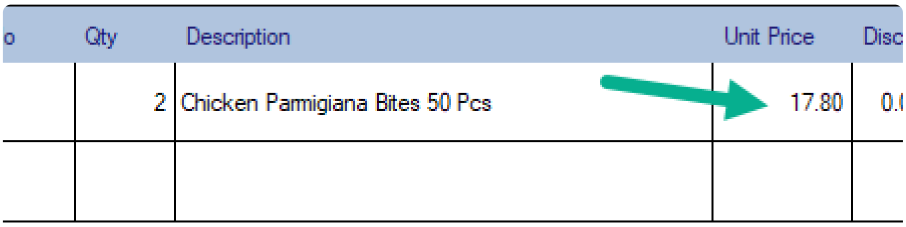
You can select an item using three different methods.
(1) Scan or type the item code and click the ‘Search’ button or press ‘ENTER’ on your keyboard.
(2) Click the ‘Search Button’ to open the ‘Lookup Item’ screen.
(3) Type the item code directly.
(4) Click the ‘No.’ column on the empty row to open the ‘Lookup Item’ screen.

2. Change the quantity


No
SKU
Stock No
Qty
Description
1
609
2
Chicken Parmigiana Bites 50 Pcs
2

Click on the ‘Qty’ column for the desired row then type the quantity.

3. Change the price

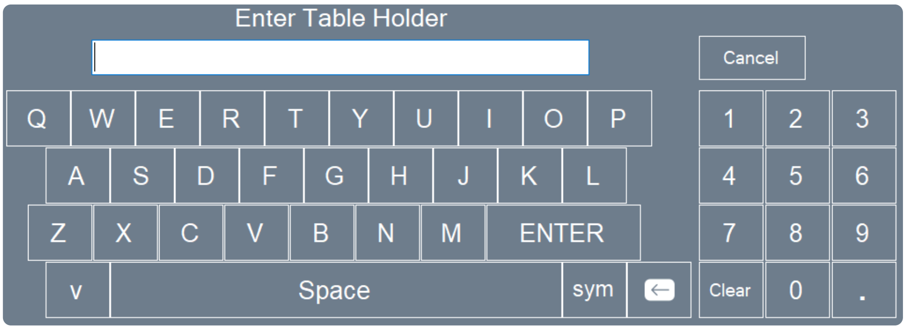

Qty
Description
Unit Price
Disc
2
Chicken Parmigiana Bites 50 Pcs
17.80

Click on the ‘Unit Price’ column for the desired row then type the price.

✻ If you want to setup ‘Price Change’ authority, you can set it up in the ‘Staff Edit’ screen. Click here for instruction

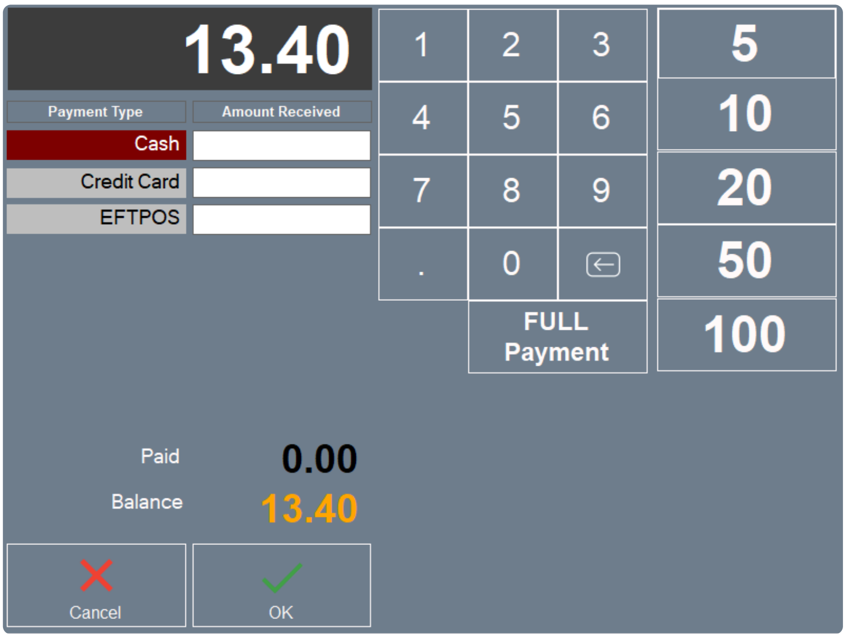
4. Click the ‘Pay’ button

5. Enter Table Number (Optional)


Enter Table Holder
Cancel
Q W E R T Y U I O P
A S D F G H J K L
Z X C V B N M ENTER
v Space sym
1 2 3
4 5 6
7 8 9
Clear 0 .

> ✻ If you want to setup ‘Table Holder Number’, you can set it up in the ‘Preferences’ screen under the ‘Options’ tab. Click here for instruction.

6. Receive Payment


Payment Type
Amount Received
Cash
Credit Card
EFTPOS
1 2 3
4 5 6
7 8 9
. 0
FULL Payment
5
10
20
50
100
Cancel
OK

13.40

Paid 0.00

Balance 13.40

Step 1 : Click on the ‘Amount Received’ column for the payment type that the customer gave.
Step 2 : Enter the amount (If customer pays the exact full amount, you can click the ‘Full Payment’ button instead).

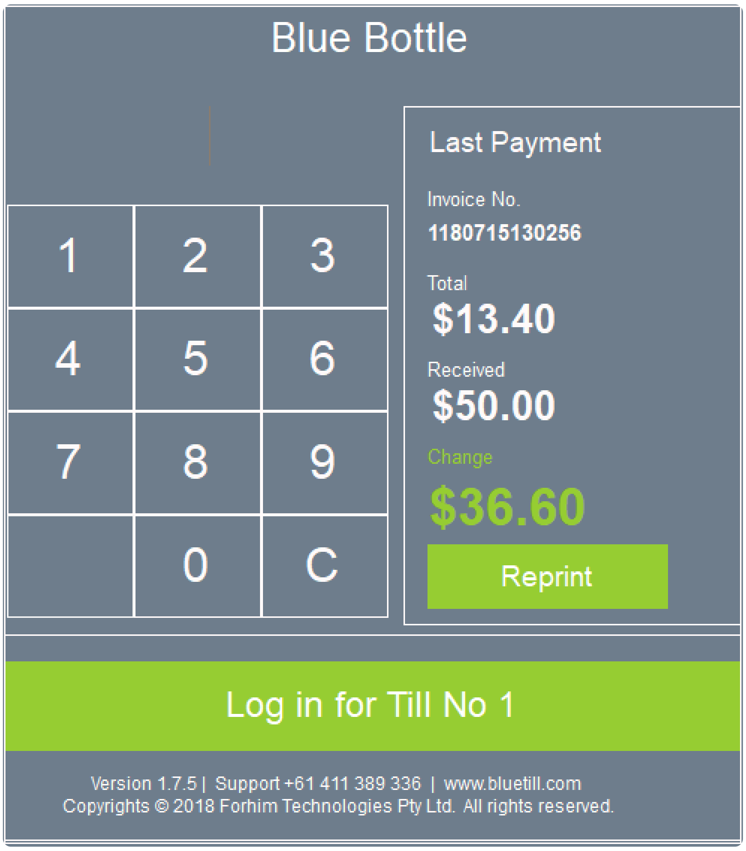
> ✻ If the customer pays with more than one different payment type, enter the amount for each type. BLUETILL displays the remaining amount automatically after you enter the

amount.

You can setup payment type in the ‘Payment Setup’ screen. Click here for instruction.

7. After Payment

After payment the staff login screen will be displayed.


Blue Bottle
1
2
3
4
5
6
7
8
9
0
C
Last Payment
Invoice No.
1180715130256
Total
$13.40
Received
$50.00
Change
$36.60
Reprint
Log in for Till No 1
Version 1.7.5 | Support +61 411 389 336 | www.bluetill.com
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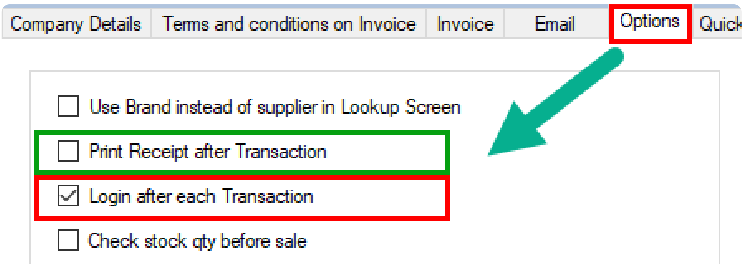
If you want to skip the login screen and/or you don’t want to print receipt after the transaction, you can change it in ‘Preferences’.

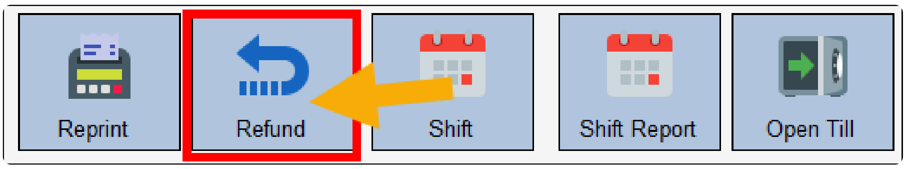

Company Details
Terms and conditions on Invoice
Invoice
Email
Options
Quick

☐ Use Brand instead of supplier in Lookup Screen
☐ Print Receipt after Transaction
☑ Login after each Transaction
☐ Check stock qty before sale

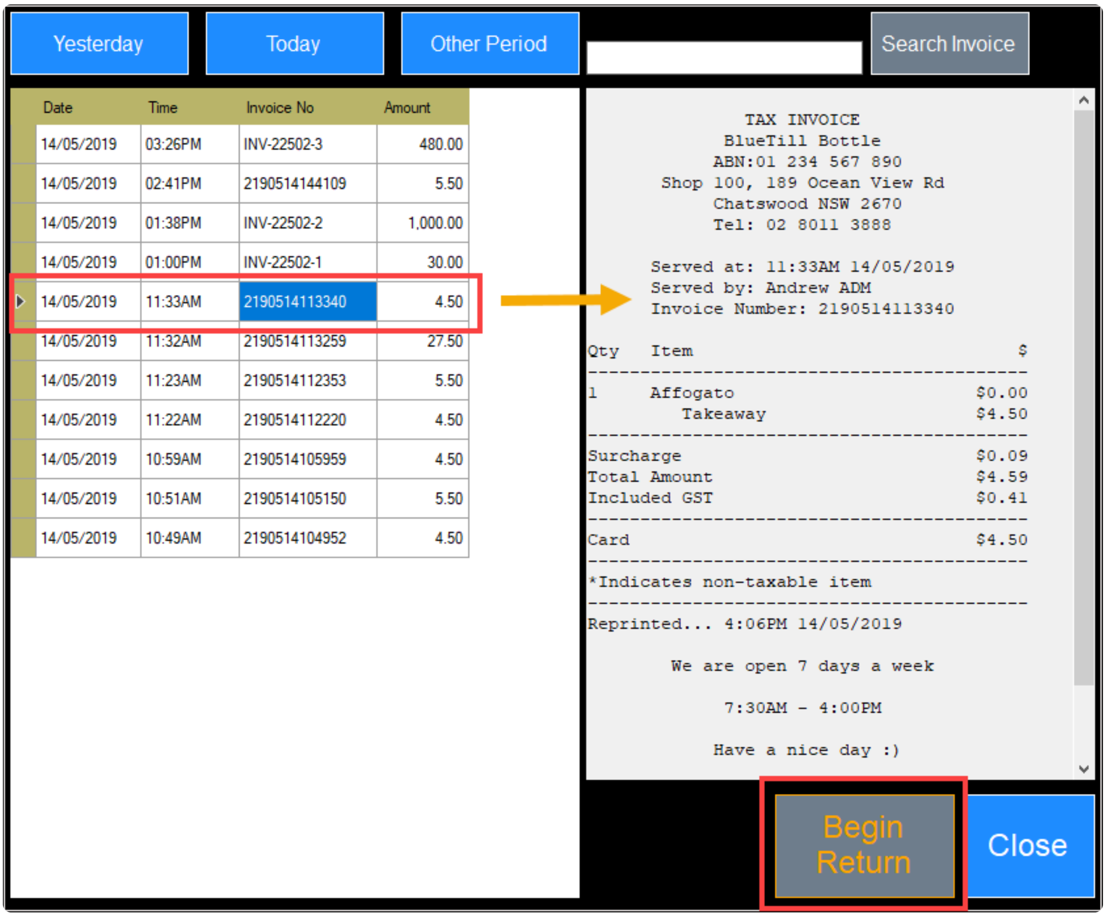
13.3. Refund

Refund by Receipt

1. Open Refund Screen



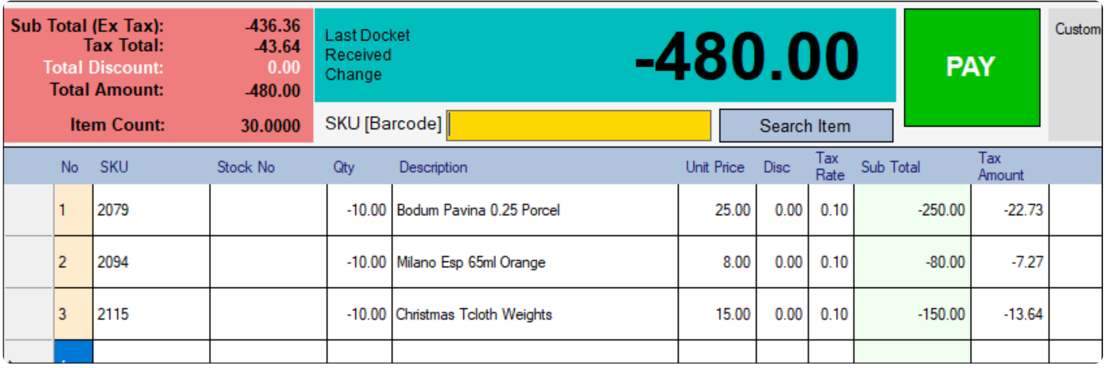
2. Select the Docket that you want to refund, Then click the Begin button.



Date	Time	Invoice No	Amount
14/05/2019	03:26PM	INV-22502-3	480.00
14/05/2019	02:41PM	2190514144109	5.50
14/05/2019	01:38PM	INV-22502-2	1,000.00
14/05/2019	01:00PM	INV-22502-1	30.00
14/05/2019	11:33AM	2190514113340	4.50
14/05/2019	11:32AM	2190514113259	27.50
14/05/2019	11:23AM	2190514112353	5.50
14/05/2019	11:22AM	2190514112220	4.50
14/05/2019	10:59AM	2190514105959	4.50
14/05/2019	10:51AM	2190514105150	5.50
14/05/2019	10:49AM	2190514104952	4.50

```
              TAX INVOICE
            BlueTill Bottle
           ABN:01 234 567 890
     Shop 100, 189 Ocean View Rd
          Chatswood NSW 2670
          Tel: 02 8011 3888

      Served at: 11:33AM 14/05/2019
      Served by: Andrew ADM
      Invoice Number: 2190514113340

Qty   Item                             $
------------------------------------------
1     Affogato                     $0.00
         Takeaway                  $4.50
------------------------------------------
Surcharge                          $0.09
Total Amount                       $4.59
Included GST                       $0.41
------------------------------------------
Card                               $4.50
------------------------------------------
*Indicates non-taxable item
------------------------------------------
Reprinted... 4:06PM 14/05/2019

        We are open 7 days a week

             7:30AM - 4:00PM

           Have a nice day :)
```

Pos Sale Screen After clicking the button



Sub Total (Ex Tax): -436.36
Tax Total: -43.64
Total Discount: 0.00
Total Amount: -480.00
Item Count: 30.0000

Last Docket
Received
Change
-480.00

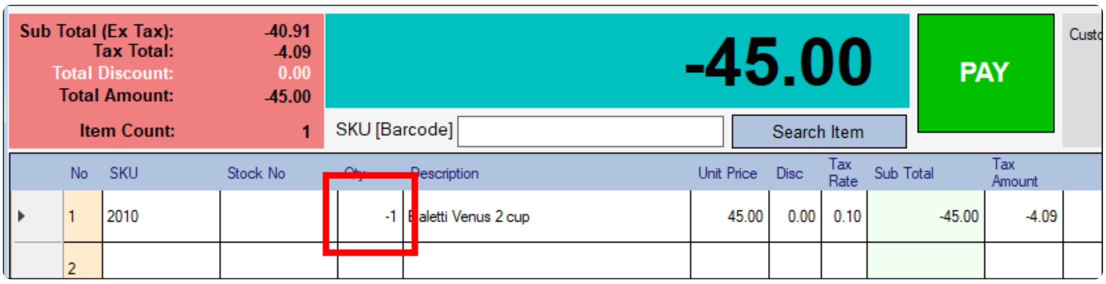
SKU [Barcode]

No	SKU	Stock No	Qty	Description	Unit Price	Disc	Tax Rate	Sub Total	Tax Amount
1	2079		-10.00	Bodum Pavina 0.25 Porcel	25.00	0.00	0.10	-250.00	-22.73
2	2094		-10.00	Milano Esp 65ml Orange	8.00	0.00	0.10	-80.00	-7.27
3	2115		-10.00	Christmas Tcloth Weights	15.00	0.00	0.10	-150.00	-13.64

3. Click the Pay button

Refund by Negative Qty Entering

1. Select the item that you want to refund
2. Click the Qty on the screen, then put the minus qty

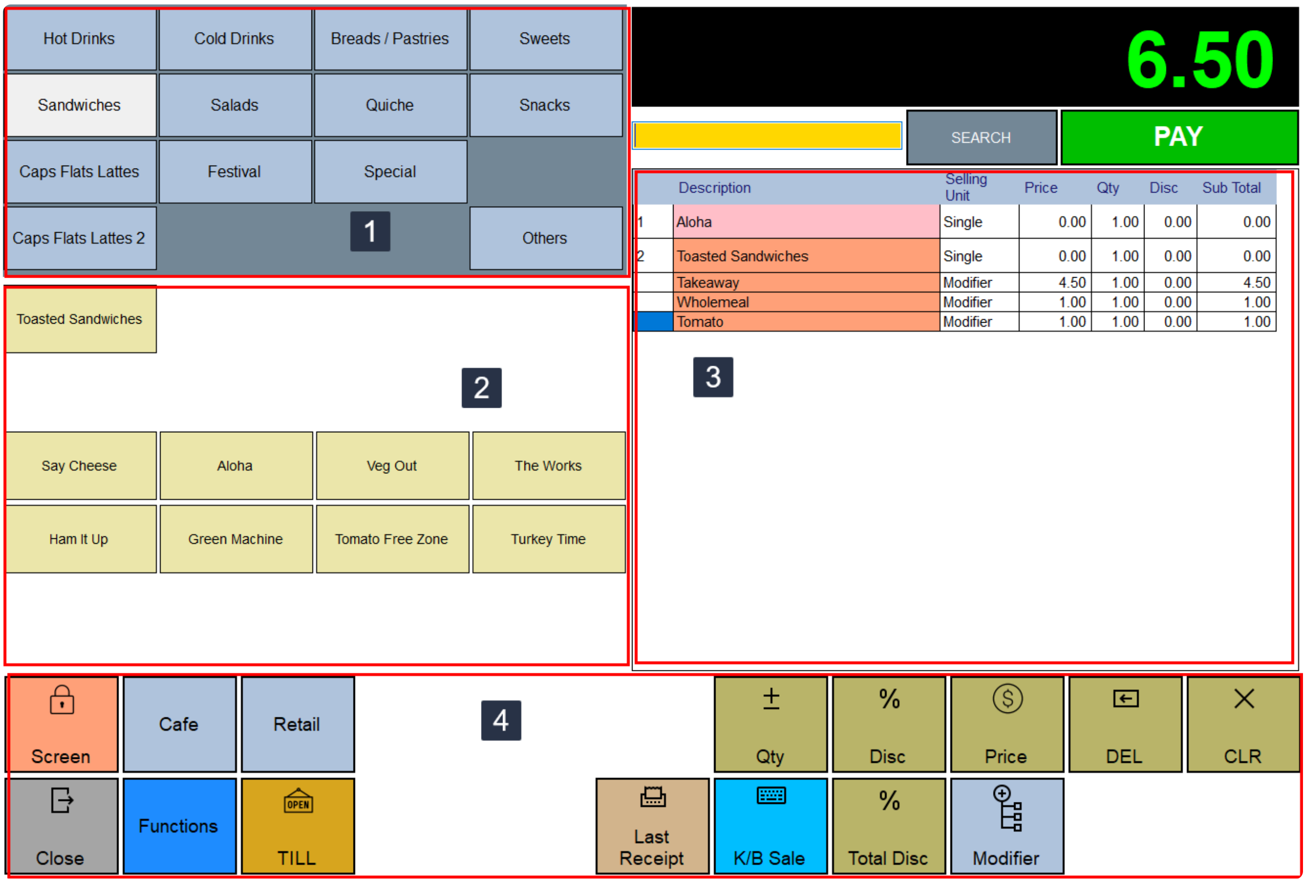


Sub Total (Ex Tax): -40.91
Tax Total: -4.09
Total Discount: 0.00
Total Amount: -45.00
Item Count: 1

No	SKU	Stock No	Qty	Description	Unit Price	Disc	Tax Rate	Sub Total	Tax Amount
1	2010		-1	Baletti Venus 2 cup	45.00	0.00	0.10	-45.00	-4.09
2									

✻ After entering the minus qty, please press the enter key.

14. Pos Touch Sale


Hot Drinks
Cold Drinks
Breads / Pastries
Sweets
Sandwiches
Salads
Quiche
Snacks
Caps Flats Lattes
Festival
Special
Caps Flats Lattes 2
1
Others
Toasted Sandwiches
2
Say Cheese
Aloha
Veg Out
The Works
Ham It Up
Green Machine
Tomato Free Zone
Turkey Time
6.50
SEARCH
PAY
3
Screen
Cafe
Retail
4
Qty
Disc
Price
DEL
CLR
Close
Functions
OPEN
TILL
Last Receipt
K/B Sale
Total Disc
Modifier

	Description	Selling Unit	Price	Qty	Disc	Sub Total
1	Aloha	Single	0.00	1.00	0.00	0.00
2	Toasted Sandwiches	Single	0.00	1.00	0.00	0.00
	Takeaway	Modifier	4.50	1.00	0.00	4.50
	Wholemeal	Modifier	1.00	1.00	0.00	1.00
	Tomato	Modifier	1.00	1.00	0.00	1.00

1. **Page button** Click here for button setup instruction
2. **Page Item** Click here for button setup instruction
3. **Selected item**
4. **Functions**

14.1. Starting & Ending Your Day

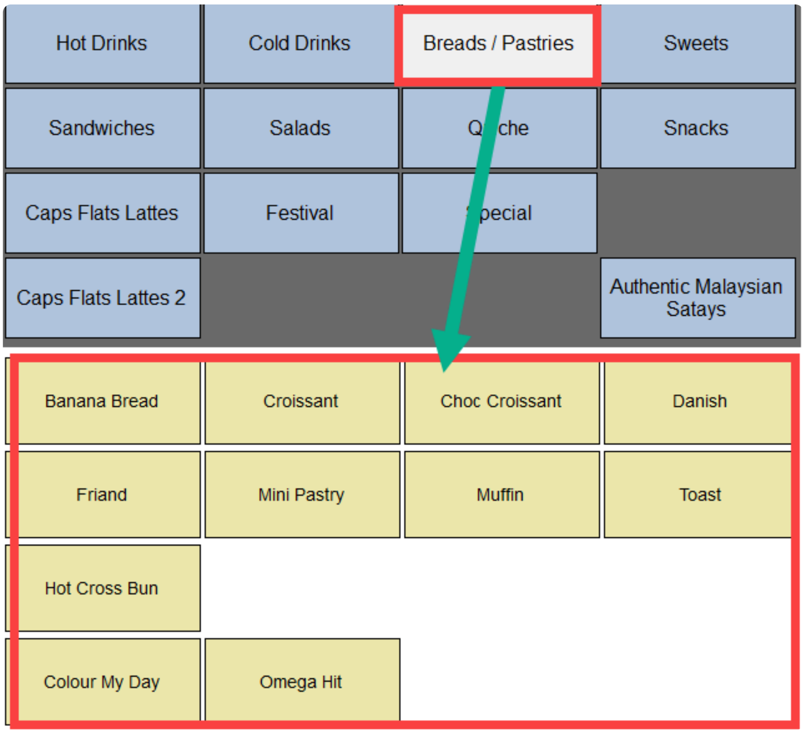
One of the first steps to starting your day is to open a shift. The shift must be open before cashiers can run any transactions at the register.
Click Here for instruction

When your business closes each day, close the shift in BLUETILL to end your day. After the shift is closed, cashiers cannot run more transactions.
Click Here for instruction

14.2. Sale Basic Item

1. Select item

Click the page button then select page item or click the ‘Search’ button.


Hot Drinks
Cold Drinks
Breads / Pastries
Sweets
Sandwiches
Salads
Q che
Snacks
Caps Flats Lattes
Festival
pecial
Caps Flats Lattes 2
Authentic Malaysian Satays
Banana Bread
Croissant
Choc Croissant
Danish
Friand
Mini Pastry
Muffin
Toast
Hot Cross Bun
Colour My Day
Omega Hit

2. Change quantity

Click the item row then click the ‘Qty’ button.

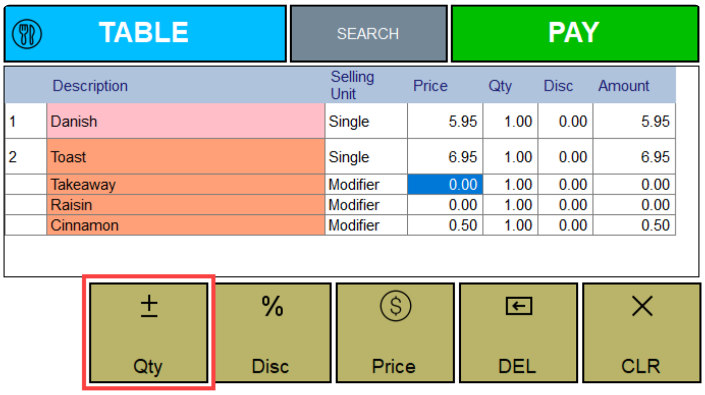
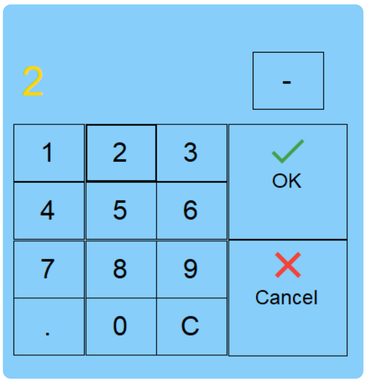


TABLE
SEARCH
PAY

	Description	Selling Unit	Price	Qty	Disc	Amount
1	Danish	Single	5.95	1.00	0.00	5.95
2	Toast	Single	6.95	1.00	0.00	6.95
	Takeaway	Modifier	0.00	1.00	0.00	0.00
	Raisin	Modifier	0.00	1.00	0.00	0.00
	Cinnamon	Modifier	0.50	1.00	0.00	0.50

±
Qty
%
Disc
$
Price
DEL
CLR

Enter Qty


2
-
1
2
3
OK
4
5
6
7
8
9
Cancel
.
0
C

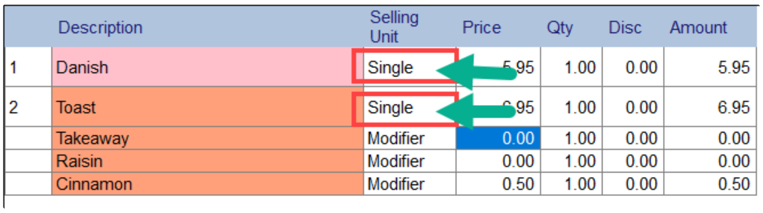
3. Change Price

Click the item row then click the ‘Price’ button.

If you want to setup ‘Price Change’ authority, you can set it up in the ‘Staff Edit’ screen. Click here for instruction

4. Delete Item

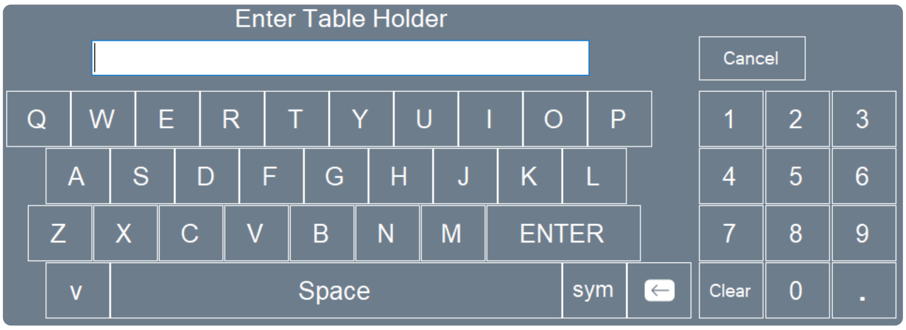
Select the desired row then click the ‘Delete’ button (If the item has modifiers, select the base item row).



	Description	Selling Unit	Price	Qty	Disc	Amount
1	Danish	Single	5.95	1.00	0.00	5.95
2	Toast	Single	6.95	1.00	0.00	6.95
	Takeaway	Modifier	0.00	1.00	0.00	0.00
	Raisin	Modifier	0.00	1.00	0.00	0.00
	Cinnamon	Modifier	0.50	1.00	0.00	0.50

5. Click Pay button

6. Enter Table Number (Optional)

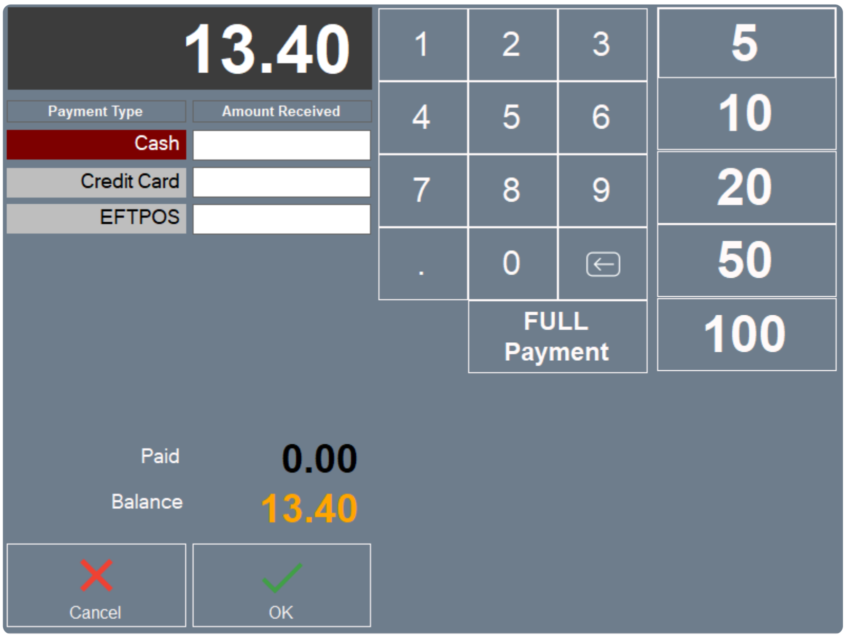

Enter Table Holder
Cancel
Q W E R T Y U I O P
A S D F G H J K L
Z X C V B N M ENTER
v Space sym
1 2 3
4 5 6
7 8 9
Clear 0 .

If you want to setup ‘Table Holder Number’, you can set it up in the ‘Preferences’ screen under the ‘Options’ tab. Click here for instruction.

7. Receive Payment

Once you have added all your items, you are ready to take payment for the sale.

Click the **Pay** button. You will be taken to the payment screen where you will find a variety of payment type (determined by what the store owner has chosen).


13.40
Payment Type
Amount Received
Cash
Credit Card
EFTPOS
1
2
3
4
5
6
7
8
9
.
0
FULL Payment
5
10
20
50
100
Cancel
OK

Paid 0.00
Balance 13.40

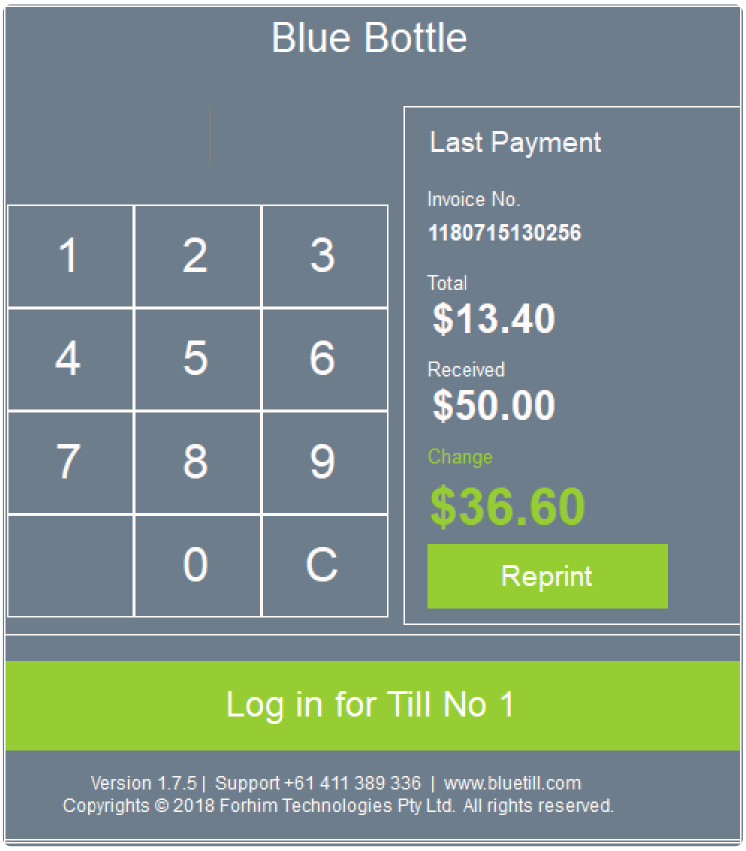
Step 1 : Click on the ‘Amount Received’ column for the payment type that the customer gave.
Step 2 : Enter the amount (If the customer pays the exact full amount, you can click the ‘Full Payment’ button instead).

✻ If the customer pays with more than one different payment type, enter the amount for each type. BLUETILL displays the remaining amount automatically after you enter the amount.

✻ You can setup payment type in the ‘Payment Setup’ screen. Click here for instruction.

8. After Payment

After payment, the staff login screen will be displayed.


Blue Bottle
1
2
3
4
5
6
7
8
9
0
C
Reprint
Log in for Till No 1

Last Payment

Invoice No.
118071513025 6

Total
$13.40

Received
$50.00

Change
$36.60

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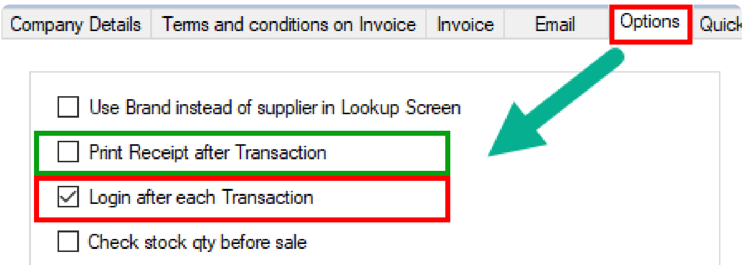
If you want to skip the login screen and/or you don't want to print a receipt after the transaction, you can change it in 'Preferences'.

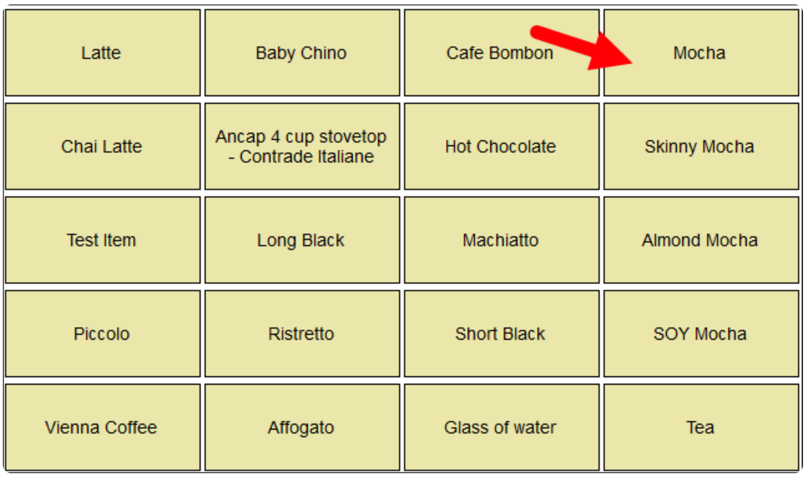

Company Details
Terms and conditions on Invoice
Invoice
Email
Options
Quick

☐ Use Brand instead of supplier in Lookup Screen
☐ Print Receipt after Transaction
☑ Login after each Transaction
☐ Check stock qty before sale

14.3. Sale Basic Item with Variants

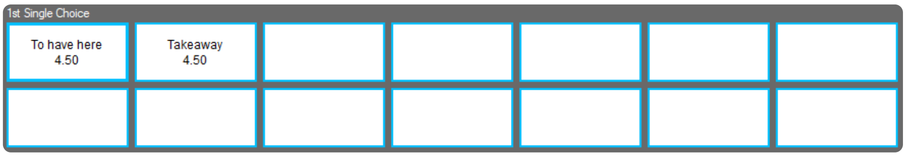
If you run a cafe or a restaurant, some items may have variants like cup size or additional toppings. Having such modifiers will open another screen to choose for the modifiers when the item is selected.

1. Select Item (If the item has any modifiers the modifier select screen will display automatically)



Latte	Baby Chino	Cafe Bombon	Mocha
Chai Latte	Ancap 4 cup stovetop - Contrade Italiane	Hot Chocolate	Skinny Mocha
Test Item	Long Black	Machiatto	Almond Mocha
Piccolo	Ristretto	Short Black	SOY Mocha
Vienna Coffee	Affogato	Glass of water	Tea

2. Select Single Choice (One selection per choice of up to 4 separate single choices can be made)

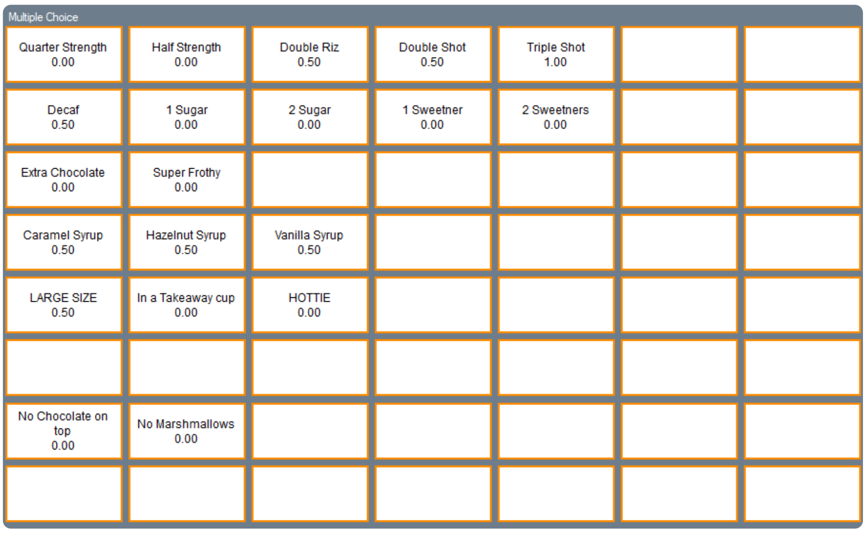


1st Single Choice

To have here 4.50	Takeaway 4.50					

If you don’t want to select the modifier after selecting it, you can click the button again to deselect it.

3. Select Multiple Choice (Any number of selections can be made)

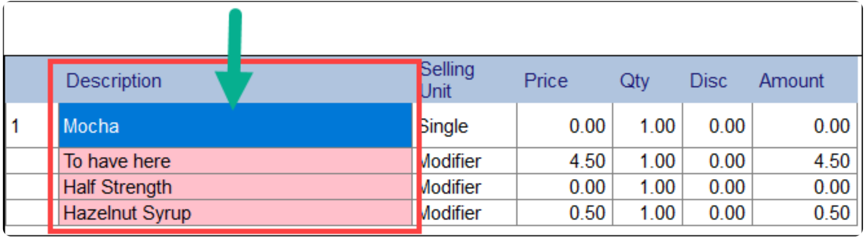


Multiple Choice

Quarter Strength 0.00	Half Strength 0.00	Double Riz 0.50	Double Shot 0.50	Triple Shot 1.00		
Decaf 0.50	1 Sugar 0.00	2 Sugar 0.00	1 Sweetner 0.00	2 Sweetners 0.00		
Extra Chocolate 0.00	Super Frothy 0.00					
Caramel Syrup 0.50	Hazelnut Syrup 0.50	Vanilla Syrup 0.50				
LARGE SIZE 0.50	In a Takeaway cup 0.00	HOTTIE 0.00				
No Chocolate on top 0.00	No Marshmallows 0.00					

Change modifier

To edit modifiers click the Description column of the base item on the sales screen.

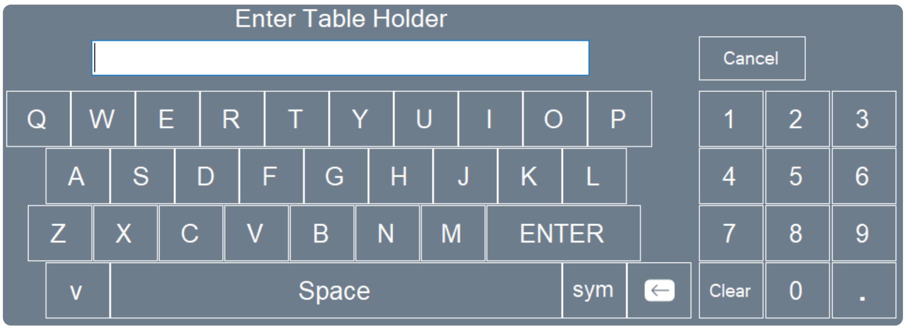


	Description	Selling Unit	Price	Qty	Disc	Amount
1	Mocha	Single	0.00	1.00	0.00	0.00
	To have here	Modifier	4.50	1.00	0.00	4.50
	Half Strength	Modifier	0.00	1.00	0.00	0.00
	Hazelnut Syrup	Modifier	0.50	1.00	0.00	0.50

4. Changing quantity, price and deleting the item is the same as basic item sale.

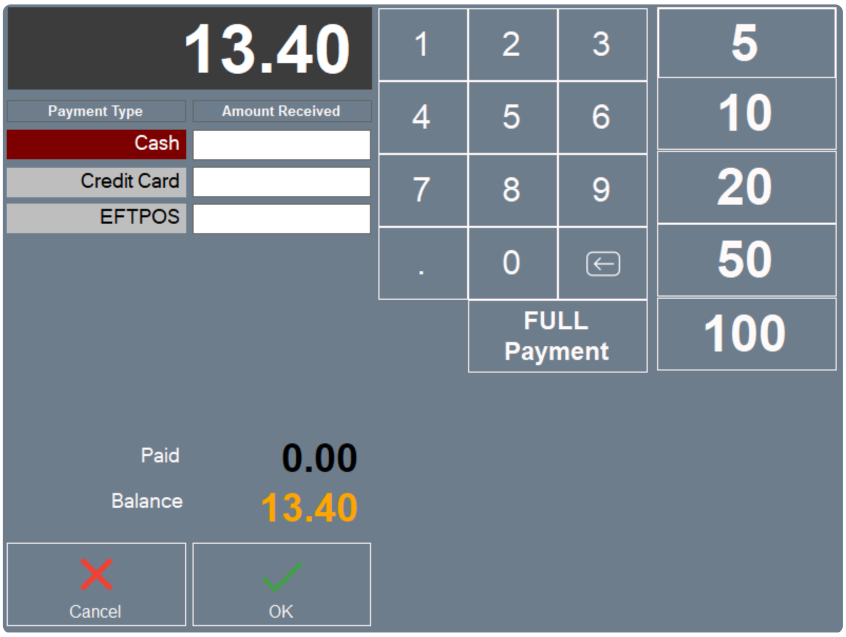
5. Click the ‘Pay’ button

6. Enter Table Number (Optional)


Enter Table Holder
Cancel
Q W E R T Y U I O P
A S D F G H J K L
Z X C V B N M ENTER
v Space sym
1 2 3
4 5 6
7 8 9
Clear 0 .

✻ If you want to setup ‘Table Holder Number’, you can set it up in the ‘Preferences’ screen under the ‘Options’ tab. Click here for instruction.

7. Receive Payment


13.40
Payment Type
Amount Received
Cash
Credit Card
EFTPOS
1
2
3
4
5
6
7
8
9
.
0
FULL Payment
5
10
20
50
100
Paid
0.00
Balance
13.40
Cancel
OK

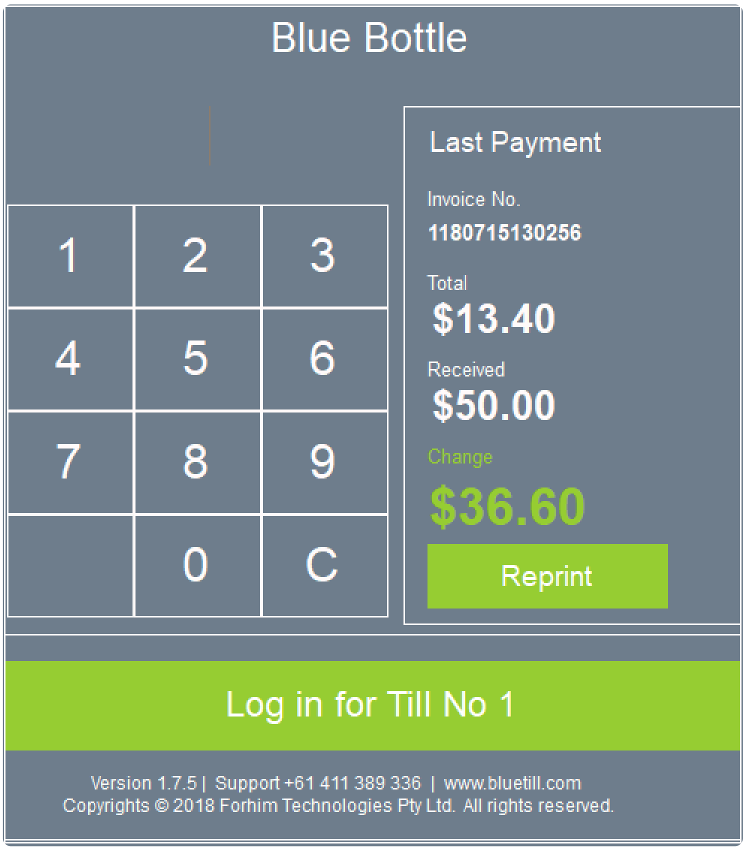
Step 1 : Click on the ‘Amount Received’ column for the payment type that the customer gave.
Step 2 : Enter the amount (If customer pays the exact full amount, you can click the ‘Full Payment’ button instead).

✻ If the customer pays with more than one different payment type, enter the amount for each type. BLUETILL displays the remaining amount automatically after you enter the amount.

✻ You can setup payment type in the ‘Payment Setup’ screen. Click here for instruction.

8. After Payment

After payment the staff login screen will be displayed.


Blue Bottle
1
2
3
4
5
6
7
8
9
0
C
Reprint
Log in for Till No 1

Last Payment

Invoice No.
1180715130256

Total
$13.40

Received
$50.00

Change
$36.60

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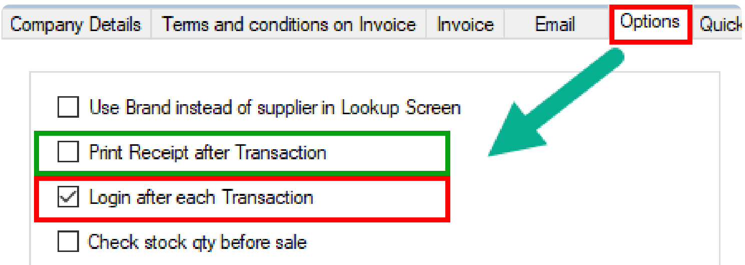
If you want to skip the login screen and/or you don’t want to print receipt after the transaction, you can change it in ‘Preferences’.

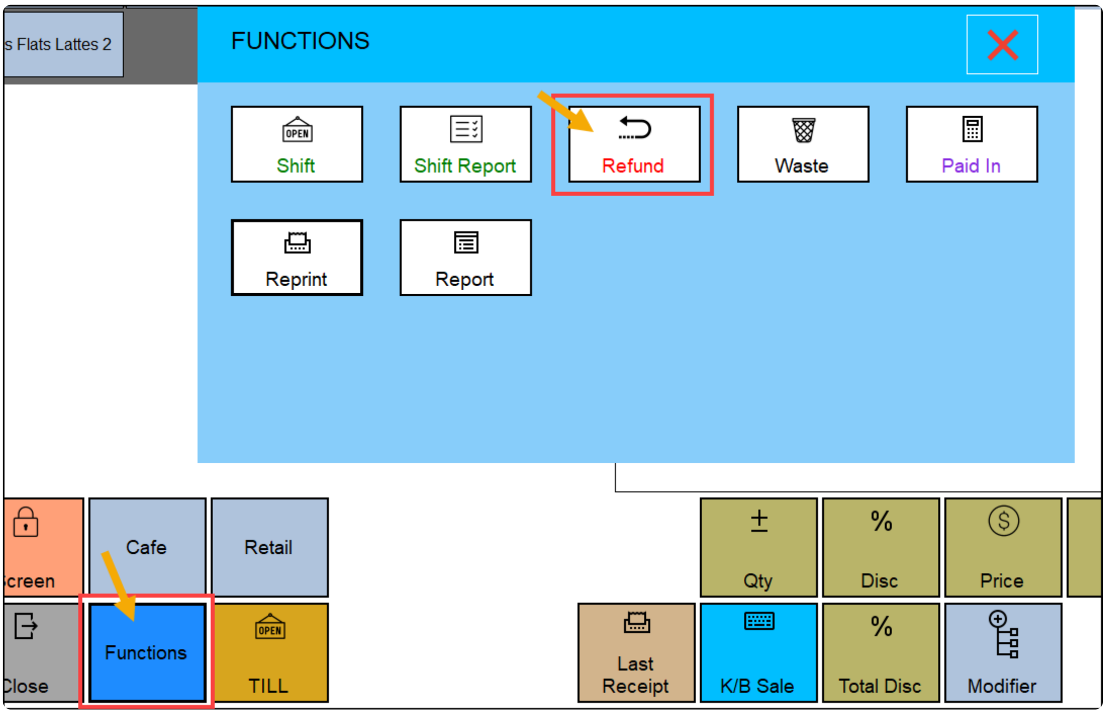

Company Details
Terms and conditions on Invoice
Invoice
Email
Options
Quick

☐ Use Brand instead of supplier in Lookup Screen
☐ Print Receipt after Transaction
☑ Login after each Transaction
☐ Check stock qty before sale

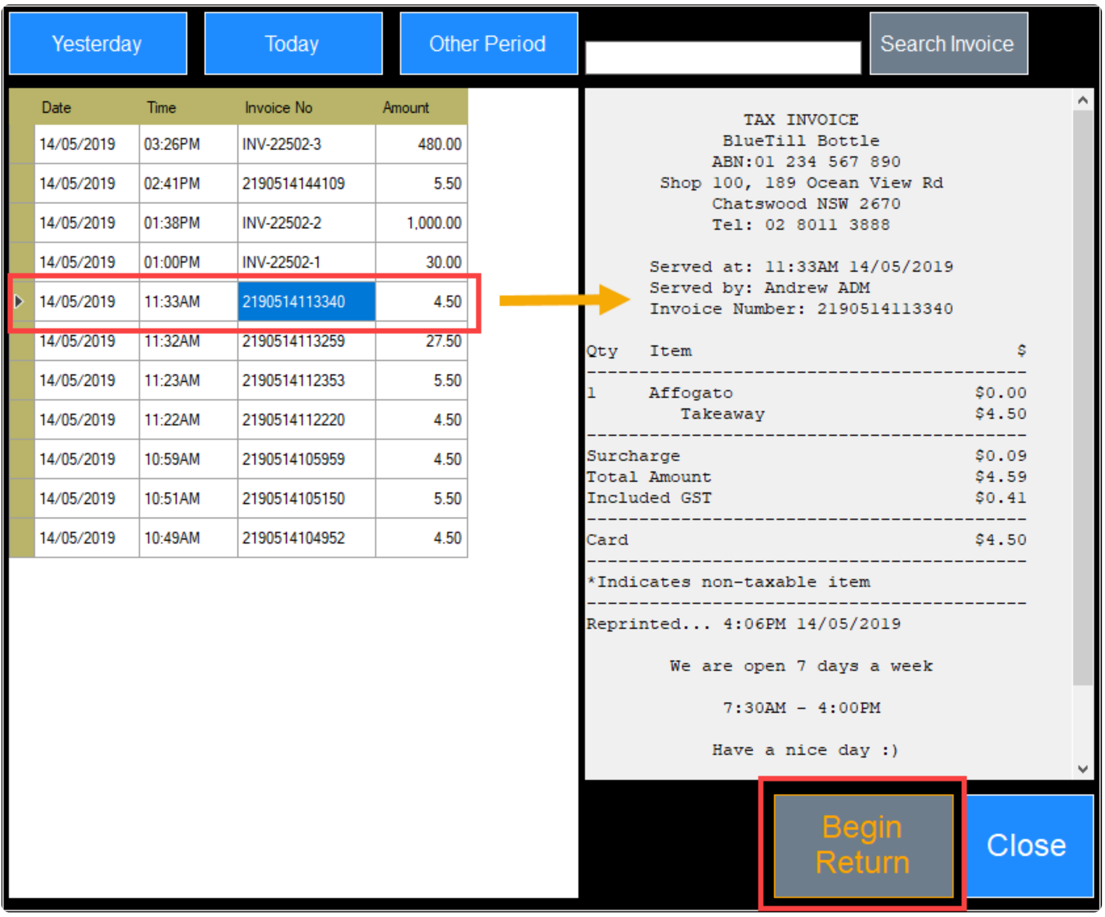
14.4. Refund in Pos Touch

Refund by Receipt

1. Open Function and Refund Screen


s Flats Lattes 2
FUNCTIONS
Shift
Shift Report
Refund
Waste
Paid In
Reprint
Report
creen
Cafe
Retail
Qty
Disc
Price
lose
Functions
TILL
Last Receipt
K/B Sale
Total Disc
Modifier

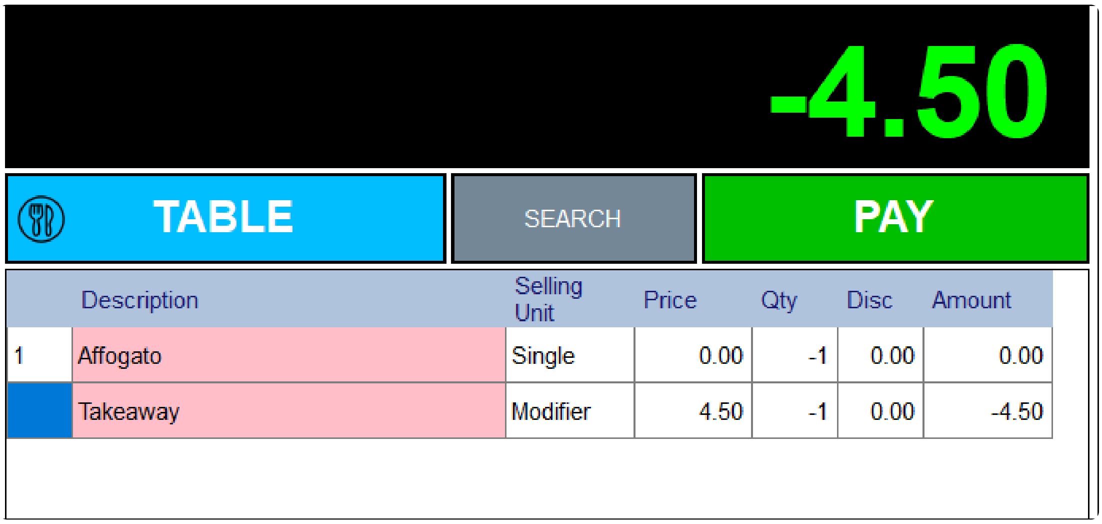
2. Select the Docket that you want to refund, Then click the Begin button.



Date	Time	Invoice No	Amount
14/05/2019	03:26PM	INV-22502-3	480.00
14/05/2019	02:41PM	2190514144109	5.50
14/05/2019	01:38PM	INV-22502-2	1,000.00
14/05/2019	01:00PM	INV-22502-1	30.00
14/05/2019	11:33AM	2190514113340	4.50
14/05/2019	11:32AM	2190514113259	27.50
14/05/2019	11:23AM	2190514112353	5.50
14/05/2019	11:22AM	2190514112220	4.50
14/05/2019	10:59AM	2190514105959	4.50
14/05/2019	10:51AM	2190514105150	5.50
14/05/2019	10:49AM	2190514104952	4.50

```
              TAX INVOICE
            BlueTill Bottle
           ABN:01 234 567 890
      Shop 100, 189 Ocean View Rd
           Chatswood NSW 2670
           Tel: 02 8011 3888

      Served at: 11:33AM 14/05/2019
      Served by: Andrew ADM
      Invoice Number: 2190514113340

Qty   Item                            $
-------------------------------------------
1     Affogato                    $0.00
         Takeaway                 $4.50
-------------------------------------------
Surcharge                         $0.09
Total Amount                      $4.59
Included GST                      $0.41
-------------------------------------------
Card                              $4.50
-------------------------------------------
*Indicates non-taxable item
-------------------------------------------
Reprinted... 4:06PM 14/05/2019

        We are open 7 days a week

             7:30AM - 4:00PM

            Have a nice day :)
```

Pos Touch Screen After clicking the button

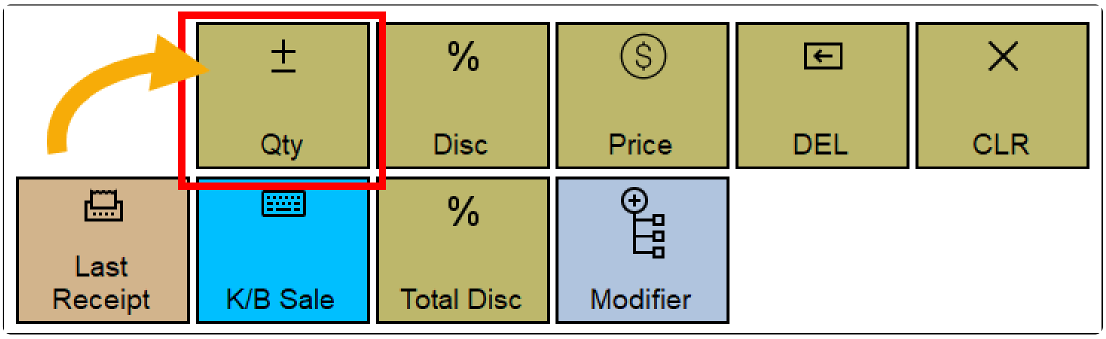


	Description	Selling Unit	Price	Qty	Disc	Amount
1	Affogato	Single	0.00	-1	0.00	0.00
	Takeaway	Modifier	4.50	-1	0.00	-4.50

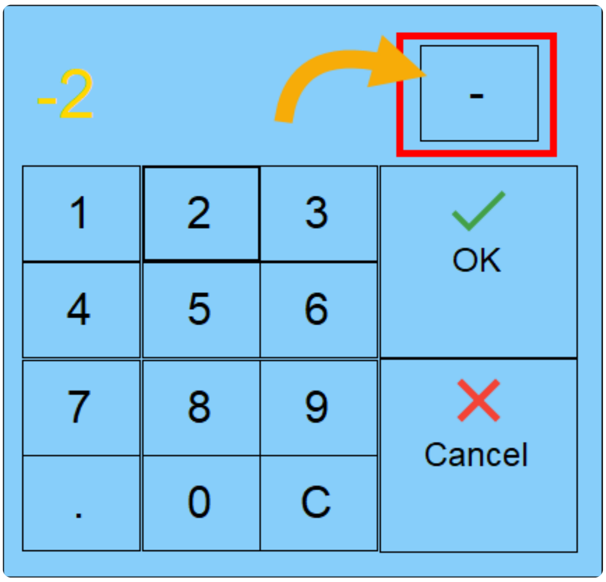
3. Click the Pay button

Refund by Negative Qty Entering

1. Select the item that you want to refund
2. Click the Qty button on the screen


Qty
Disc
Price
DEL
CLR
Last Receipt
K/B Sale
Total Disc
Modifier

3. Click the minus button first. Then click the Qty button

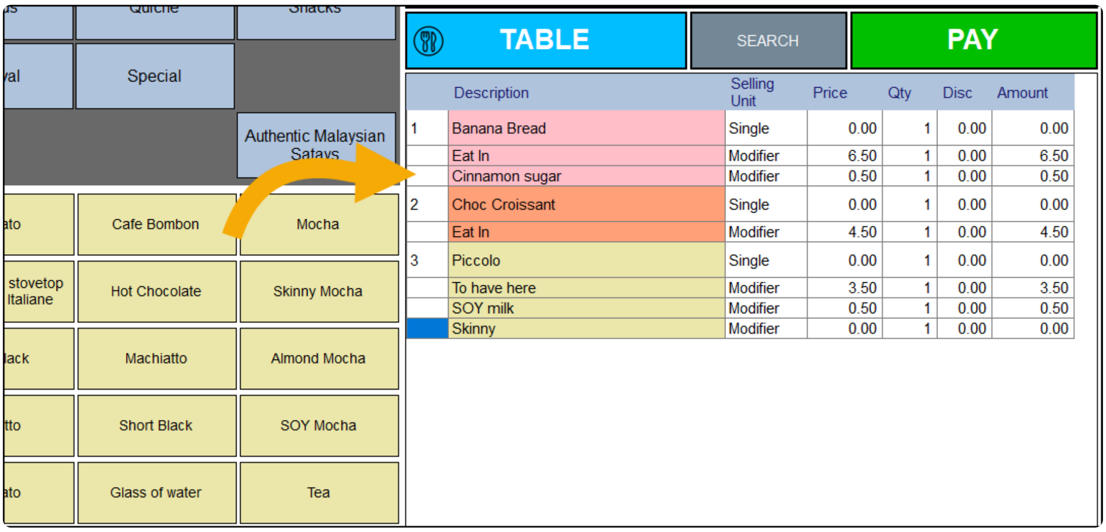

-2
-
1
2
3
4
5
6
7
8
9
.
0
C
OK
Cancel

If the item has a variation with a price, you need to change the qty it too.

14.5. Table Order (optional)

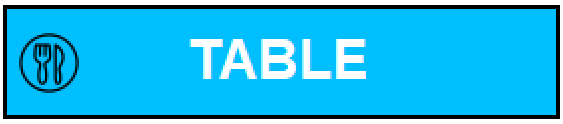
New Table Order

1. Select menu

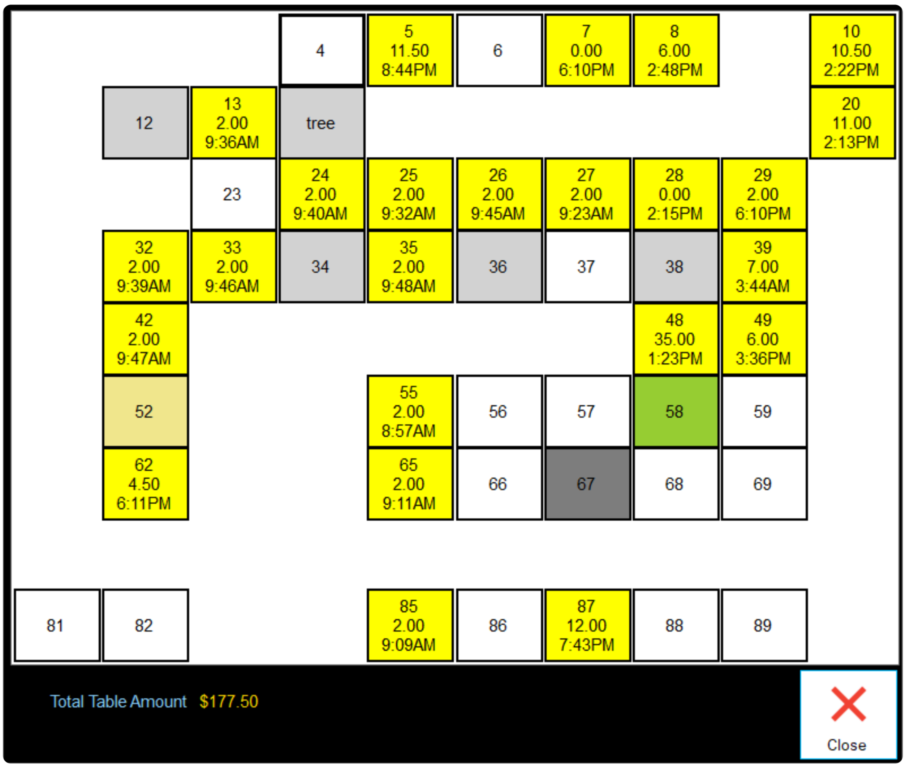

Quiche
Snacks
Special
Authentic Malaysian Satays
Cafe Bombon
Mocha
stovetop Italiane
Hot Chocolate
Skinny Mocha
Machiatto
Almond Mocha
Short Black
SOY Mocha
Glass of water
Tea
TABLE
SEARCH
PAY

	Description	Selling Unit	Price	Qty	Disc	Amount
1	Banana Bread	Single	0.00	1	0.00	0.00
	Eat In	Modifier	6.50	1	0.00	6.50
	Cinnamon sugar	Modifier	0.50	1	0.00	0.50
2	Choc Croissant	Single	0.00	1	0.00	0.00
	Eat In	Modifier	4.50	1	0.00	4.50
3	Piccolo	Single	0.00	1	0.00	0.00
	To have here	Modifier	3.50	1	0.00	3.50
	SOY milk	Modifier	0.50	1	0.00	0.50
	Skinny	Modifier	0.00	1	0.00	0.00

2. Click the Table button



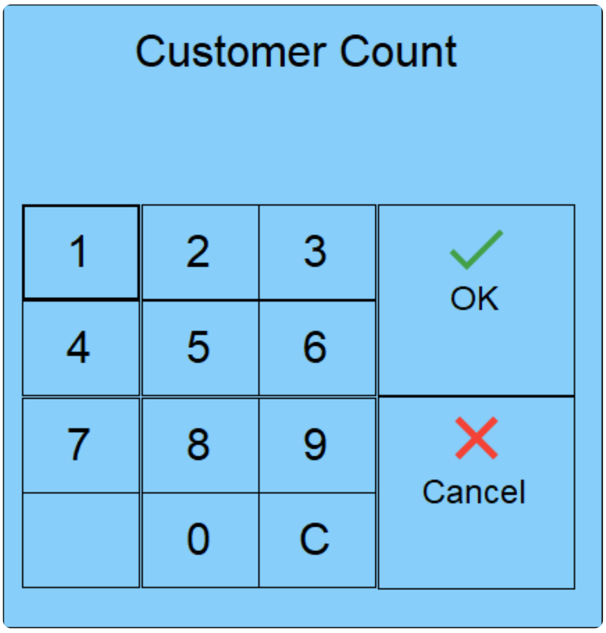
3. Select the table that seated with customer


4
5 11.50 8:44PM
6
7 0.00 6:10PM
8 6.00 2:48PM
10 10.50 2:22PM
12
13 2.00 9:36AM
tree
20 11.00 2:13PM
23
24 2.00 9:40AM
25 2.00 9:32AM
26 2.00 9:45AM
27 2.00 9:23AM
28 0.00 2:15PM
29 2.00 6:10PM
32 2.00 9:39AM
33 2.00 9:46AM
34
35 2.00 9:48AM
36
37
38
39 7.00 3:44AM
42 2.00 9:47AM
48 35.00 1:23PM
49 6.00 3:36PM
52
55 2.00 8:57AM
56
57
58
59
62 4.50 6:11PM
65 2.00 9:11AM
66
67
68
69
81
82
85 2.00 9:09AM
86
87 12.00 7:43PM
88
89
Close

Total Table Amount $177.50

✻ Table button contains the following details. 1st line is table name. 2nd line is ordered amount. the last line is the last ordered time.

4. Enter the customer count

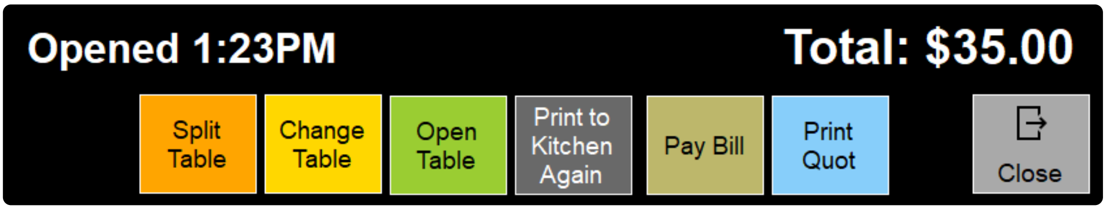

Customer Count
1
2
3
4
5
6
7
8
9
0
C
OK
Cancel

Add Extra Order for Table

1. Click the Table button

✻ If you have selected menus when you click the table button, it's a new table order.

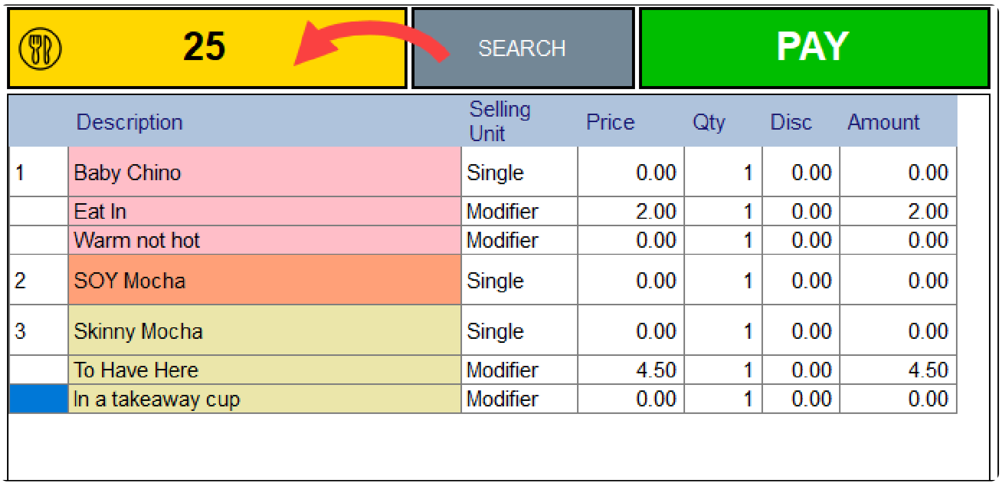
2. The select table that you need to add an extra order
3. Click the 'Open Table' button


Opened 1:23PM
Total: $35.00
Split Table
Change Table
Open Table
Print to Kitchen Again
Pay Bill
Print Quot
Close

Split Table	Split to two tables
Change Table	Change table
Open Table	Open table for add extra order
Print to Kitchen Again	Print the ordered menu to kitchen
Pay Bill	Open Payment screen

Print Quot	Print bill quotation

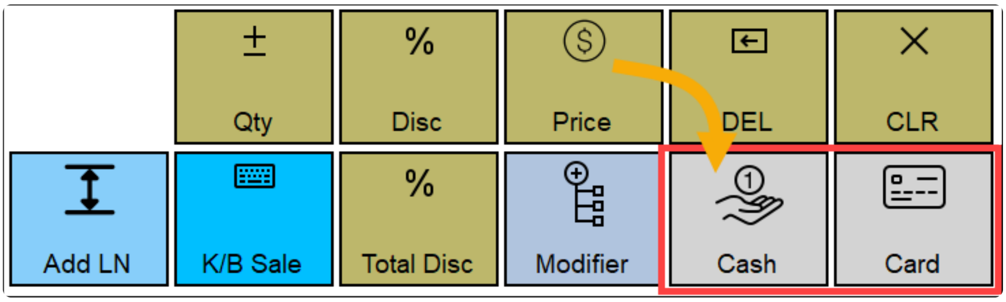
4. Add extra orders
5. Click the Table button



	Description	Selling Unit	Price	Qty	Disc	Amount
1	Baby Chino	Single	0.00	1	0.00	0.00
	Eat In	Modifier	2.00	1	0.00	2.00
	Warm not hot	Modifier	0.00	1	0.00	0.00
2	SOY Mocha	Single	0.00	1	0.00	0.00
3	Skinny Mocha	Single	0.00	1	0.00	0.00
	To Have Here	Modifier	4.50	1	0.00	4.50
	In a takeaway cup	Modifier	0.00	1	0.00	0.00

14.6. One Click Taking Payment

Click the ‘Cash’ or ‘Card’ button on the screen

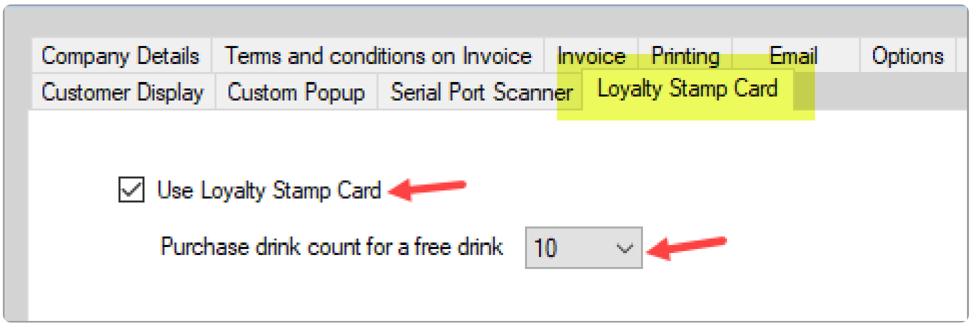

Qty
Disc
Price
DEL
CLR
Add LN
K/B Sale
Total Disc
Modifier
Cash
Card

If you click a Cash or Card button, it’s the same as clicking the ‘Full Payment’ button on the Payment screen. It’s a shortcut of full payment by cash and card.

14.7. Loyalty Stamp Card (optional)

It's a simple offer of a free coffee (or drink) when a customer has purchased a certain number of drinks.

Setup purchase drink count for a free drink


Company Details
Terms and conditions on Invoice
Invoice
Printing
Email
Options
Customer Display
Custom Popup
Serial Port Scanner
Loyalty Stamp Card

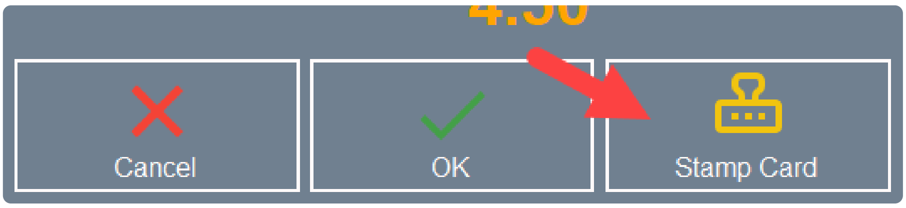
☑ Use Loyalty Stamp Card

Purchase drink count for a free drink 10

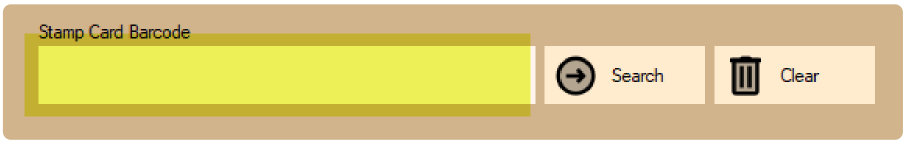
1. Select the Use Loyalty Stamp Card option
2. Enter Purchase drink count for a free drink

Use Loyalty Stamp Card

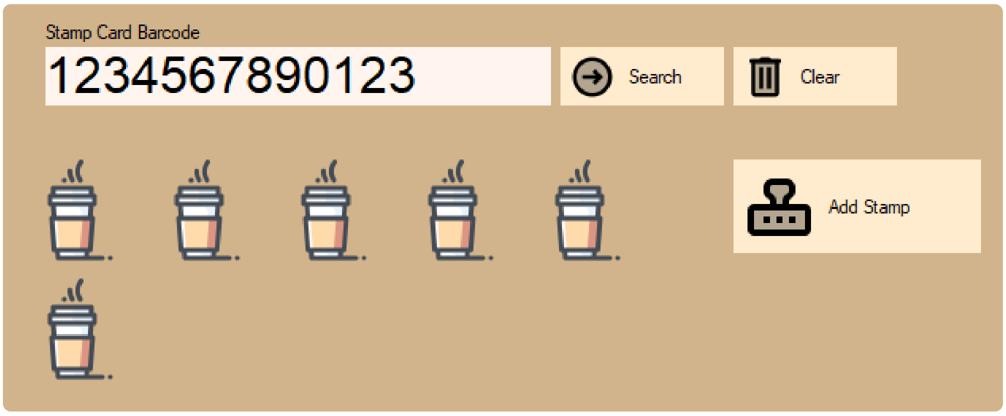
1. Click **Stamp Card** button on the Payment screen


4.50
Cancel
OK
Stamp Card

2. Scan the Barcode on the Stamp card

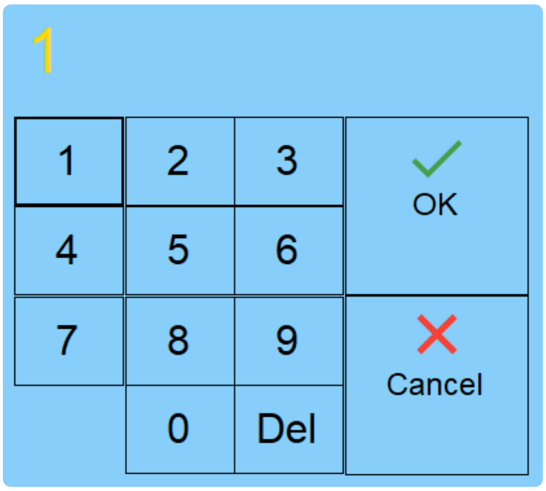

Stamp Card Barcode
Search
Clear

3. After you scan the stamp card barcode, you can see the collected stamp counts. Click **Add Stamp** button

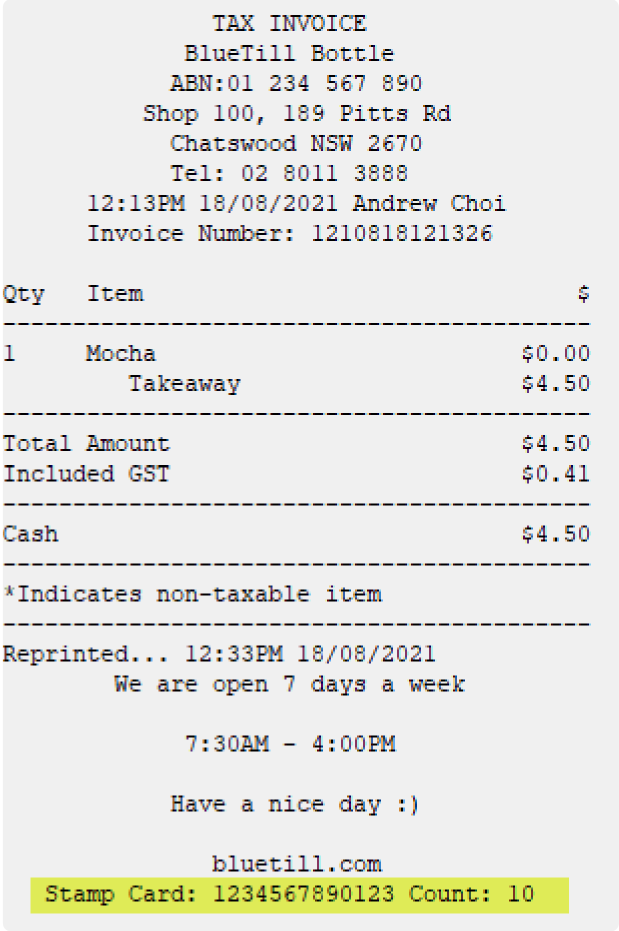

Search
Clear
Add Stamp

Stamp Card Barcode 1234567890123

4. Enter Stamp count. The default count is one.



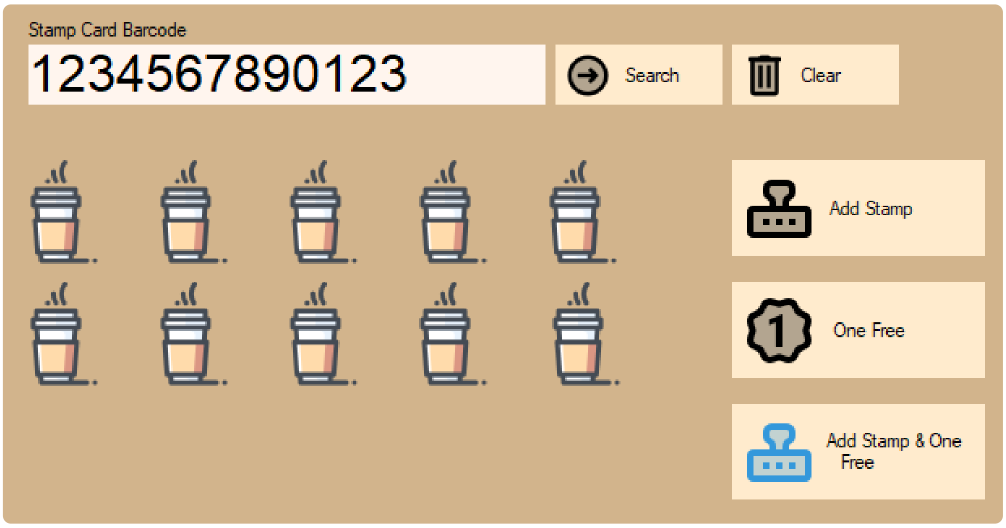
Stamp count displays on receipt.



```
                TAX INVOICE
              BlueTill Bottle
             ABN:01 234 567 890
          Shop 100, 189 Pitts Rd
             Chatswood NSW 2670
             Tel: 02 8011 3888
      12:13PM 18/08/2021 Andrew Choi
      Invoice Number: 1210818121326

Qty   Item                                 $
------------------------------------------
1     Mocha                            $0.00
         Takeaway                      $4.50
------------------------------------------
Total Amount                           $4.50
Included GST                           $0.41
------------------------------------------
Cash                                   $4.50
------------------------------------------
*Indicates non-taxable item
------------------------------------------
Reprinted... 12:33PM 18/08/2021
        We are open 7 days a week

            7:30AM - 4:00PM

            Have a nice day :)

               bluetill.com
  Stamp Card: 1234567890123 Count: 10
```

Give Free Drink

1. If the collected stamp is over the free drink purchase setup, you can see the One Free and Add Stamp & One Free button.



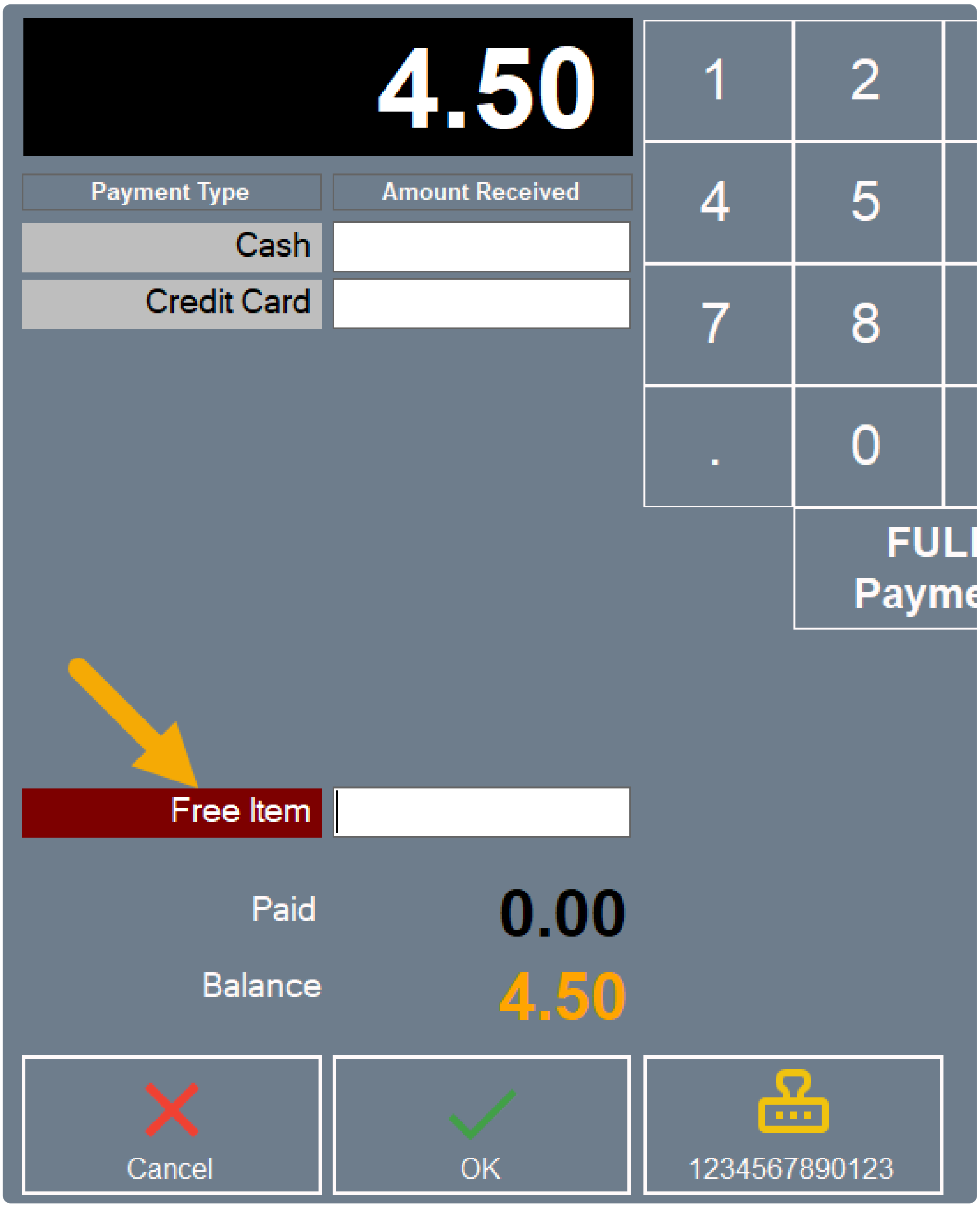
Stamp Card Barcode

1234567890123

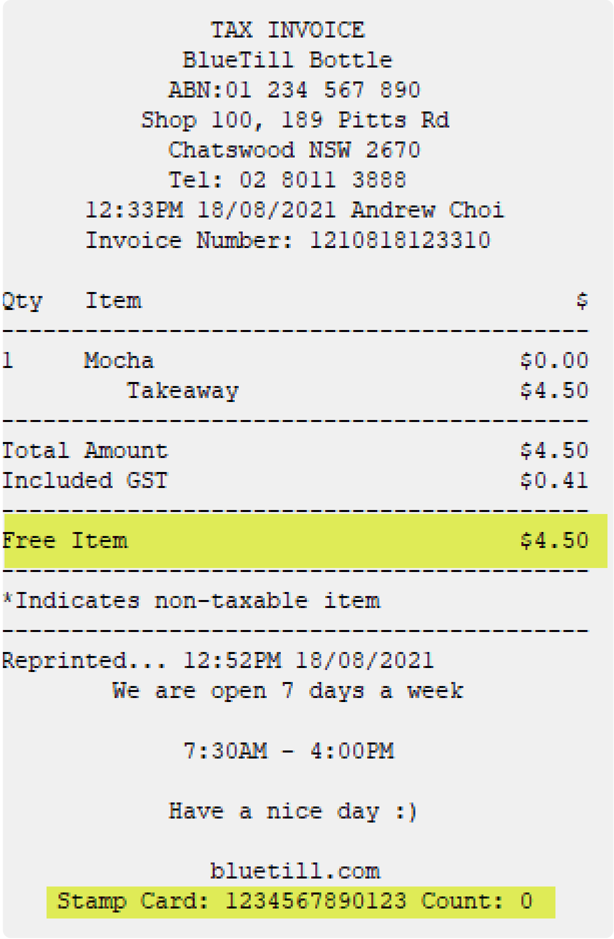
Search
Clear
Add Stamp
One Free
Add Stamp & One Free

One Free	Redeem the stamp. For example, If a customer collected 10 stamps, the system will remove the 10 stamps.
Add Stamp & One Free	Redeem and collect the stamp at the same time.

2. You can see the **Free Item** payment type. Use this payment type for Free Drink.


4.50
Payment Type
Amount Received
Cash
Credit Card
Free Item
Paid
0.00
Balance
4.50
1
2
4
5
7
8
.
0
FULL
Payme
Cancel
OK
1234567890123

Paid by **Free Item** docket sample.

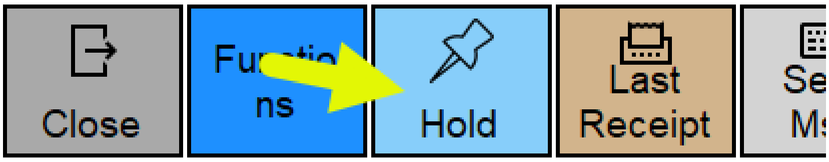


```
              TAX INVOICE
            BlueTill Bottle
           ABN:01 234 567 890
         Shop 100, 189 Pitts Rd
           Chatswood NSW 2670
           Tel: 02 8011 3888
      12:33PM 18/08/2021 Andrew Choi
      Invoice Number: 1210818123310

Qty   Item                              $
------------------------------------------
1     Mocha                         $0.00
         Takeaway                   $4.50
------------------------------------------
Total Amount                        $4.50
Included GST                        $0.41
------------------------------------------
Free Item                           $4.50
------------------------------------------
*Indicates non-taxable item
------------------------------------------
Reprinted... 12:52PM 18/08/2021
        We are open 7 days a week

             7:30AM - 4:00PM

           Have a nice day :)

              bluetill.com
    Stamp Card: 1234567890123 Count: 0
```

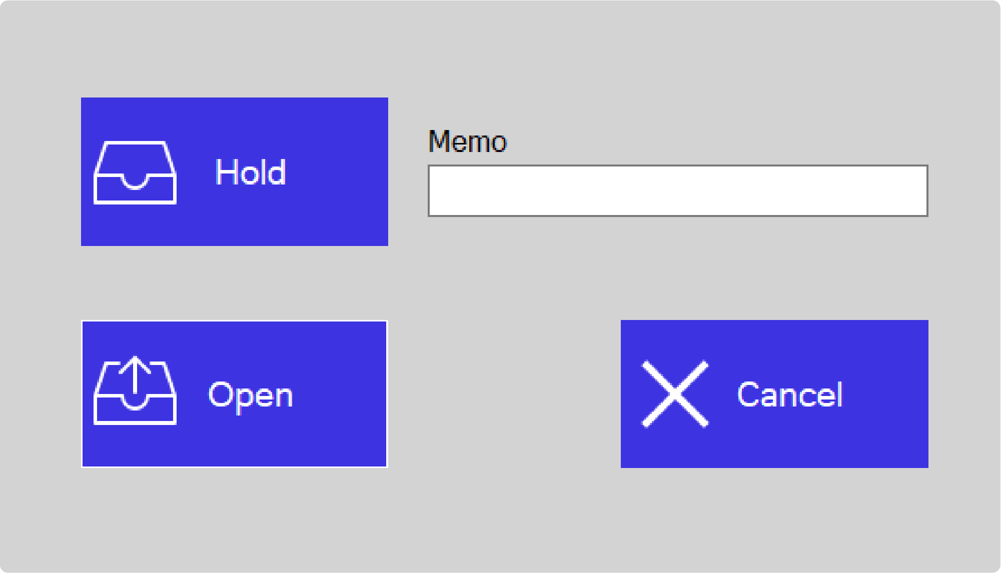
14.8. Holding Sale

You can hold up to 35 sales.

Open Hold screen

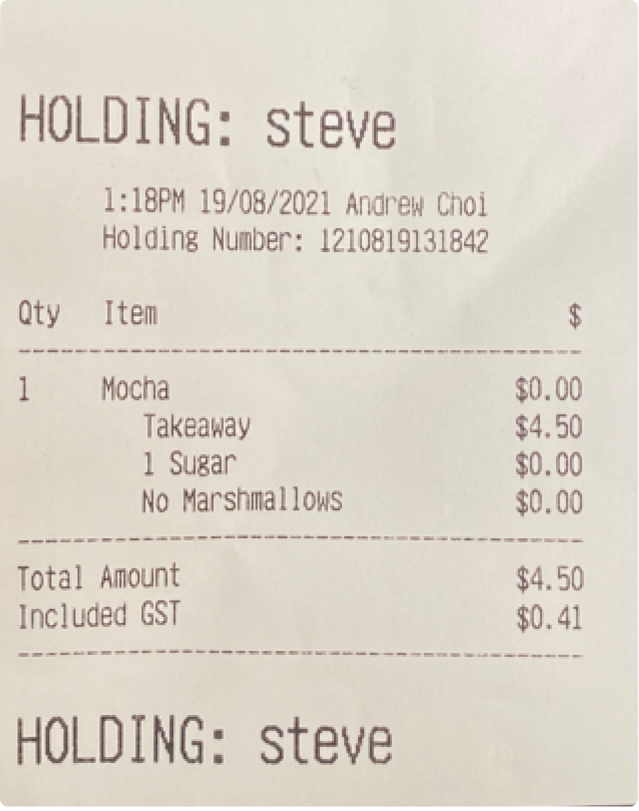

Close
Functions
Hold
Last Receipt
Se
M

1. Hold Screen


Hold
Memo
Open
Cancel

Hold	You can hold a selected item.
Memo	You can save a memo for reference.
Open	You can open the saved Holding sales screen.

After saved the sale, the Holding docket will be printed automatically.



HOLDING: steve

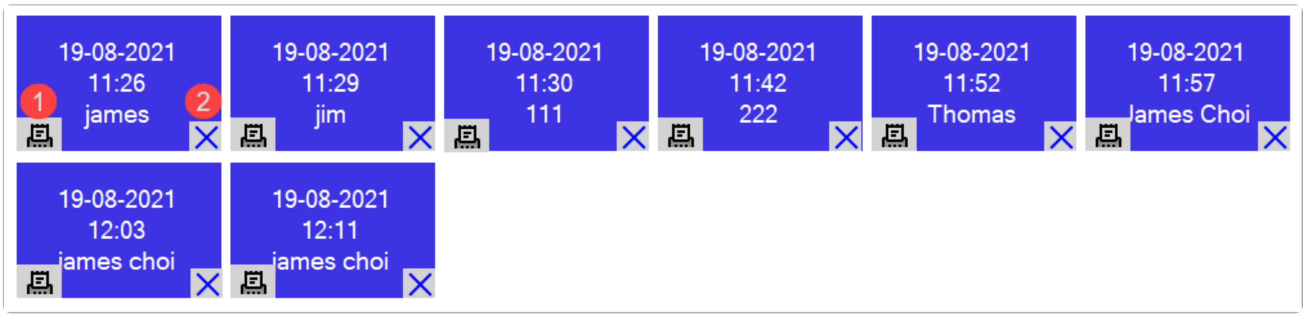
1:18PM 19/08/2021 Andrew Choi
Holding Number: 1210819131842

Qty	Item	$
1	Mocha	$0.00
	Takeaway	$4.50
	1 Sugar	$0.00
	No Marshmallows	$0.00

Total Amount	$4.50
Included GST	$0.41

HOLDING: steve

2. Open or Delete Hold Sale



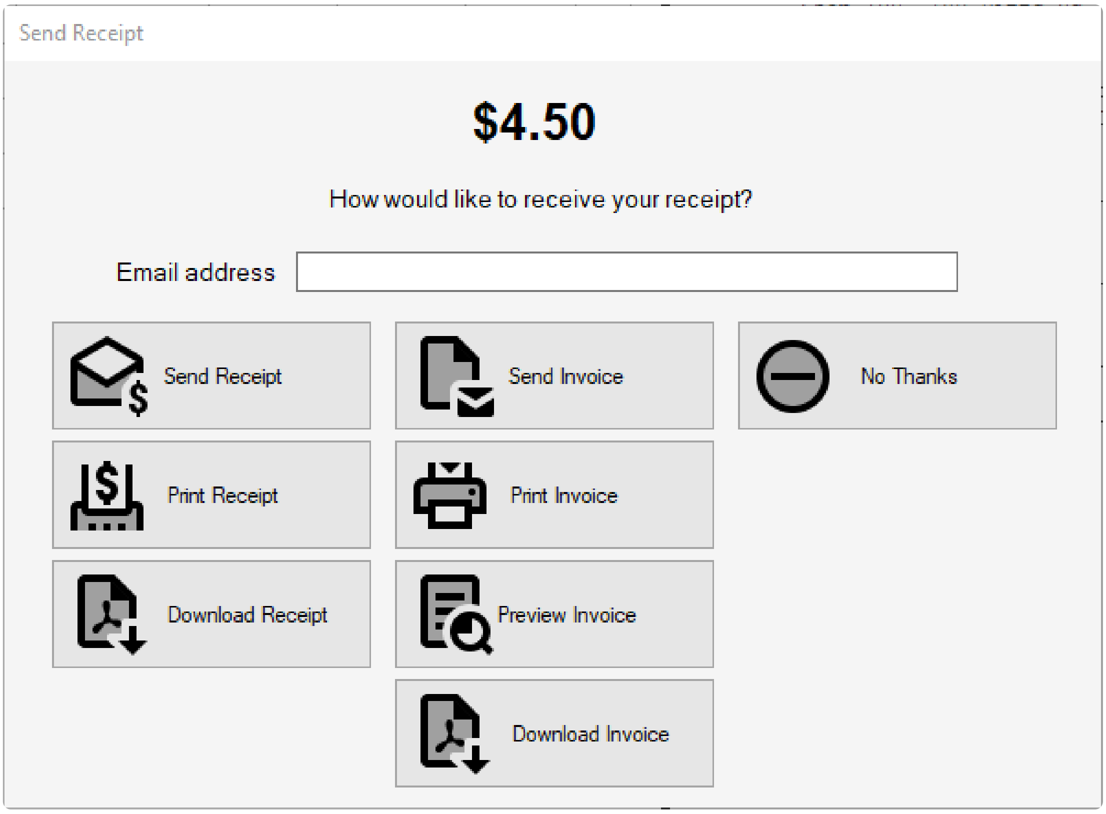
19-08-2021 11:26 james
19-08-2021 11:29 jim
19-08-2021 11:30 111
19-08-2021 11:42 222
19-08-2021 11:52 Thomas
19-08-2021 11:57 James Choi
19-08-2021 12:03 james choi
19-08-2021 12:11 james choi

1	Print Holding sale.
2	Delete Holding sale.

✻ After opening the Holding sale, you can remove or keep it

14.9. Send Receipt

You can send the receipt on Reprint Screen.



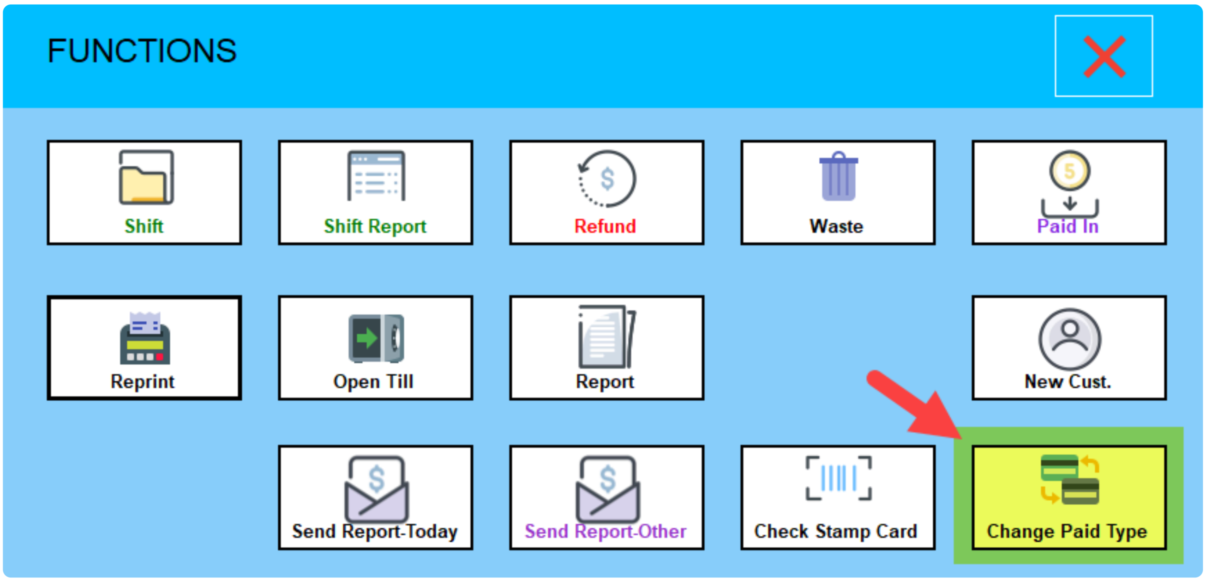
Send Receipt
$4.50
How would like to receive your receipt?
Email address
Send Receipt
Send Invoice
No Thanks
Print Receipt
Print Invoice
Download Receipt
Preview Invoice
Download Invoice

Send Receipt	Send receipt to email.
Print Receipt	Print receipt through receipt printer.
Download Receipt	Download receipt to a PDF file.
Send Invoice	Send receipt as an invoice layout to email.
Print Invoice	Print receipt as an invoice layout.
Preview Invoice	Preview receipt as an invoice layout.
Download Invoice	Download receipt as an invoice layout.

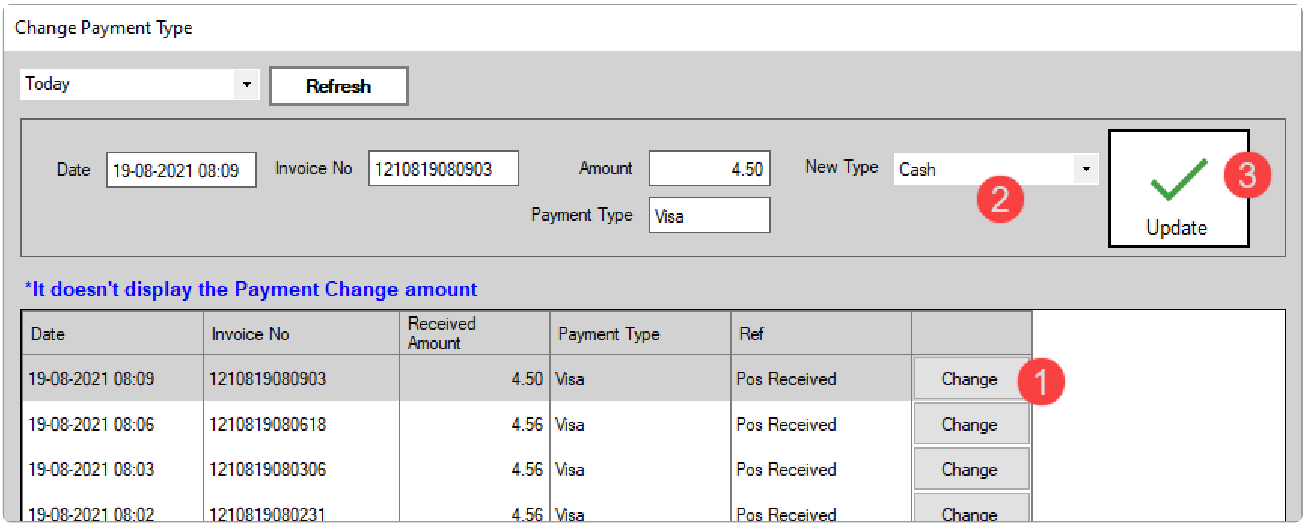
14.10. Change Paid Type

You can change the received paid type.

1. Open Change Paid Type screen on Function screen


FUNCTIONS
Shift
Shift Report
Refund
Waste
Paid In
Reprint
Open Till
Report
New Cust.
Send Report-Today
Send Report-Other
Check Stamp Card
Change Paid Type

2. Select the transaction you want to change the payment type, then update


Change Payment Type
Refresh
Update
1
2
3
Change

Today

Date 19-08-2021 08:09 Invoice No 1210819080903 Amount 4.50 New Type Cash

Payment Type Visa

*It doesn't display the Payment Change amount

Date	Invoice No	Received Amount	Payment Type	Ref	
19-08-2021 08:09	1210819080903	4.50	Visa	Pos Received	Change
19-08-2021 08:06	1210819080618	4.56	Visa	Pos Received	Change
19-08-2021 08:03	1210819080306	4.56	Visa	Pos Received	Change
19-08-2021 08:02	1210819080231	4.56	Visa	Pos Received	Change

Step 1 : Select the transaction you want to change.
Step 2 : Select a new payment type.
Step 3 : Click the Update button.

15. Purchase

15.1. Purchase Order

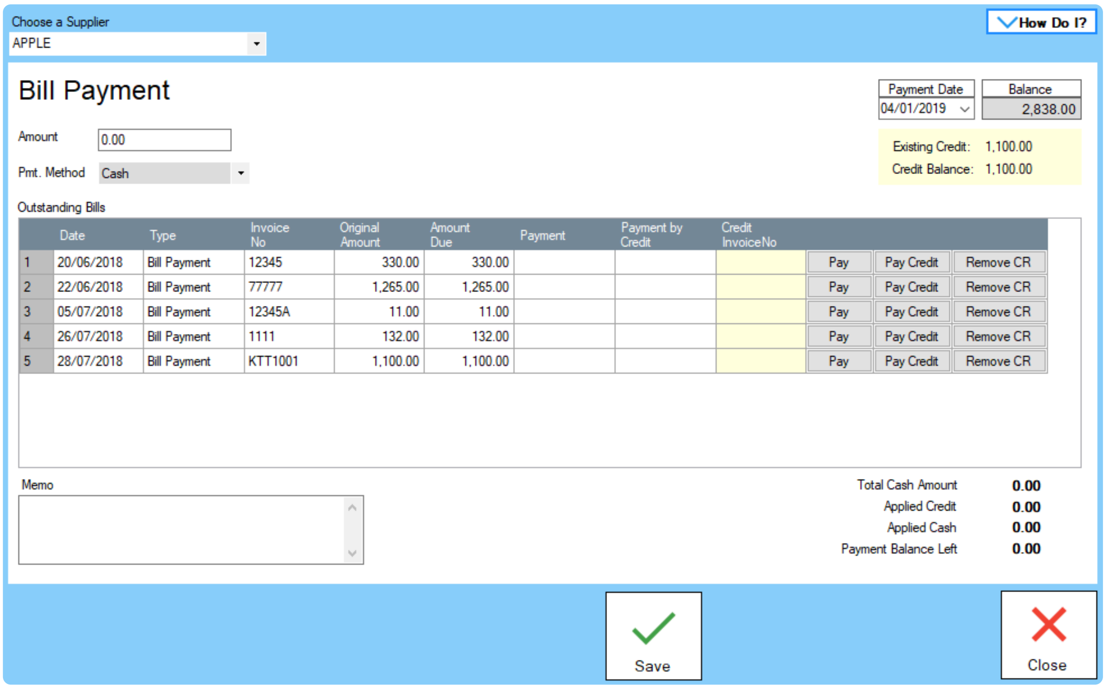
15.2. Receive Inventory

15.3. Return to Supplier

15.4. Pay a Bill

Enter bills when you get them and pay them when they're due.

Apply the payment to one or more open invoices.



Choose a Supplier: APPLE

Bill Payment

Payment Date: 04/01/2019
Balance: 2,838.00
Amount: 0.00
Pmt. Method: Cash
Existing Credit: 1,100.00
Credit Balance: 1,100.00

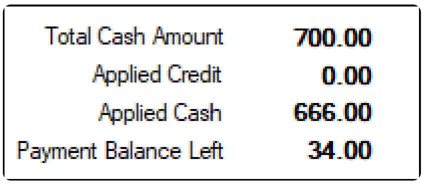
Outstanding Bills

	Date	Type	Invoice No	Original Amount	Amount Due	Payment	Payment by Credit	Credit InvoiceNo			
1	20/06/2018	Bill Payment	12345	330.00	330.00				Pay	Pay Credit	Remove CR
2	22/06/2018	Bill Payment	77777	1,265.00	1,265.00				Pay	Pay Credit	Remove CR
3	05/07/2018	Bill Payment	12345A	11.00	11.00				Pay	Pay Credit	Remove CR
4	26/07/2018	Bill Payment	1111	132.00	132.00				Pay	Pay Credit	Remove CR
5	28/07/2018	Bill Payment	KTT1001	1,100.00	1,100.00				Pay	Pay Credit	Remove CR

Memo

Total Cash Amount	0.00
Applied Credit	0.00
Applied Cash	0.00
Payment Balance Left	0.00

1. Select the Supplier.
2. Type the amount received next to 'Amount'.
3. Select the payment method.
4. Enter the amounts you want to apply to one or more bills in the 'Payment' column. If you click the 'Pay' button, invoice's due amount will be filled automatically.



Total Cash Amount	700.00
Applied Credit	0.00
Applied Cash	666.00
Payment Balance Left	34.00

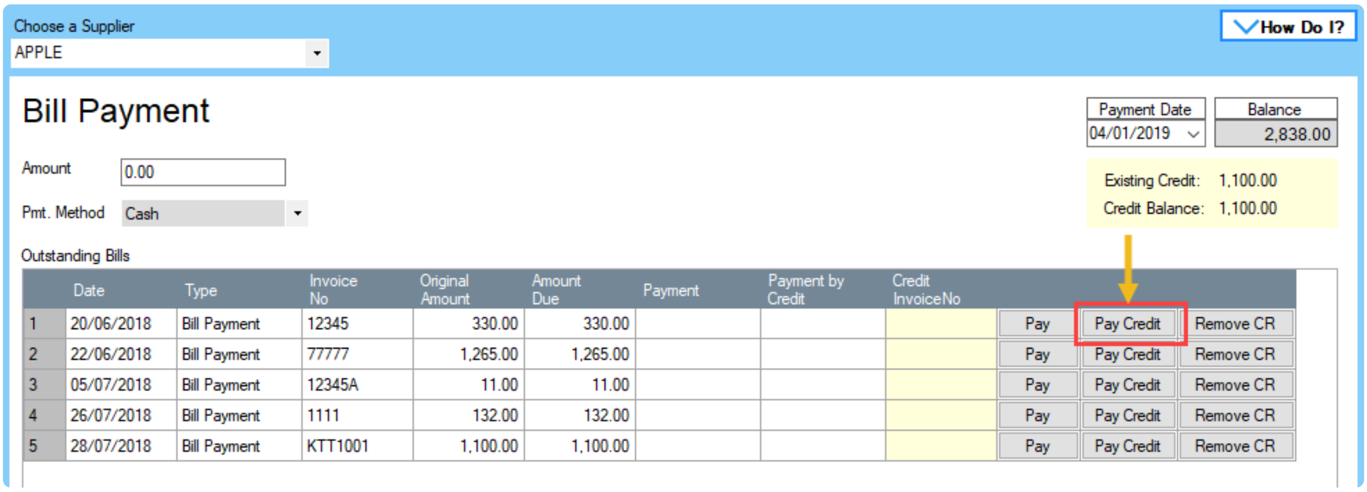
Total Cash Amount	Total payment amount made for the supplier.
Applied Credit	Total amount of credit currently being applied to bills.
Applied Cash	Total amount of cash currently being applied to bills.
Payment Balance Left	The amount of cash that is yet to be applied to bills calculated from the 'Total Cash Amount' minus the 'Applied Cash' amount. The 'Payment Balance Left' must be zero before you can record the transaction.

15.5. Apply credit from a supplier to a bill payment

Applying the credit to specific bills

1. Select the Supplier.

2. Click the Pay Credit Button.



Choose a Supplier: APPLE

Bill Payment

Amount: 0.00

Pmt. Method: Cash

Payment Date: 04/01/2019

Balance: 2,838.00

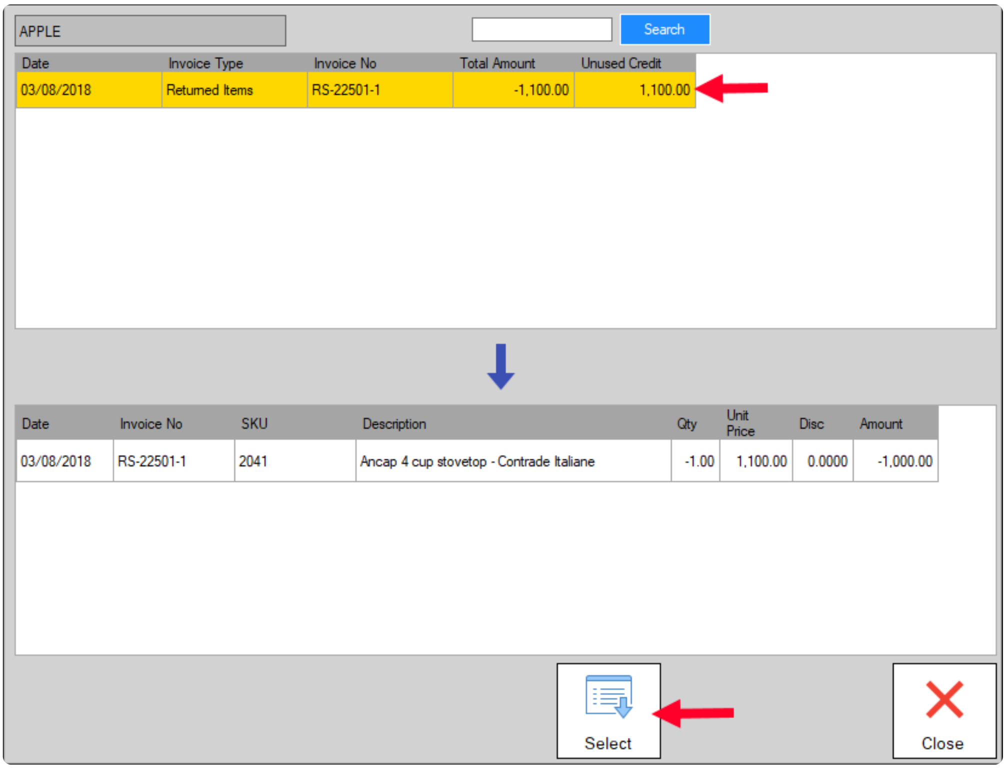
Existing Credit: 1,100.00

Credit Balance: 1,100.00

Outstanding Bills

	Date	Type	Invoice No	Original Amount	Amount Due	Payment	Payment by Credit	Credit InvoiceNo
1	20/06/2018	Bill Payment	12345	330.00	330.00			
2	22/06/2018	Bill Payment	77777	1,265.00	1,265.00			
3	05/07/2018	Bill Payment	12345A	11.00	11.00			
4	26/07/2018	Bill Payment	1111	132.00	132.00			
5	28/07/2018	Bill Payment	KTT1001	1,100.00	1,100.00			

3. Select the credit bill that you want to pay to the bill

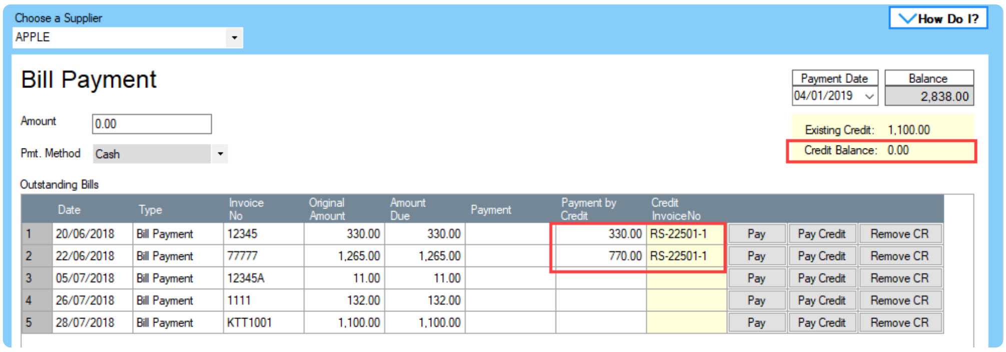


APPLE

Date	Invoice Type	Invoice No	Total Amount	Unused Credit
03/08/2018	Returned Items	RS-22501-1	-1,100.00	1,100.00

Date	Invoice No	SKU	Description	Qty	Unit Price	Disc	Amount
03/08/2018	RS-22501-1	2041	Ancap 4 cup stovetop - Contrade Italiane	-1.00	1,100.00	0.0000	-1,000.00

After applied the credit bill, you can see the credit bill no. And credit balance will reduce



Choose a Supplier: APPLE

Bill Payment

Payment Date: 04/01/2019

Balance: 2,838.00

Amount: 0.00

Pmt. Method: Cash

Existing Credit: 1,100.00

Credit Balance: 0.00

Outstanding Bills

	Date	Type	Invoice No	Original Amount	Amount Due	Payment	Payment by Credit	Credit InvoiceNo			
1	20/06/2018	Bill Payment	12345	330.00	330.00		330.00	RS-22501-1	Pay	Pay Credit	Remove CR
2	22/06/2018	Bill Payment	77777	1,265.00	1,265.00		770.00	RS-22501-1	Pay	Pay Credit	Remove CR
3	05/07/2018	Bill Payment	12345A	11.00	11.00				Pay	Pay Credit	Remove CR
4	26/07/2018	Bill Payment	1111	132.00	132.00				Pay	Pay Credit	Remove CR
5	28/07/2018	Bill Payment	KTT1001	1,100.00	1,100.00				Pay	Pay Credit	Remove CR

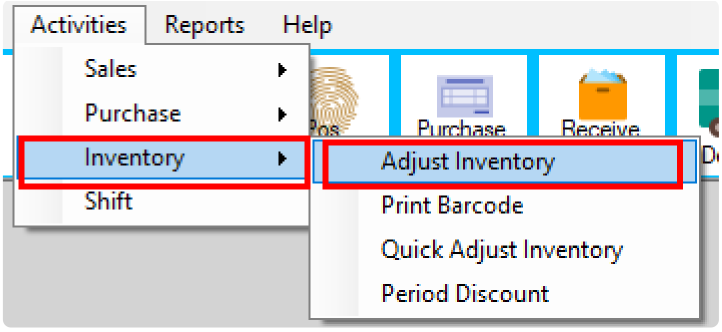
✻ Remove CR button will remove the applied credit payment.

4. Click the Save button

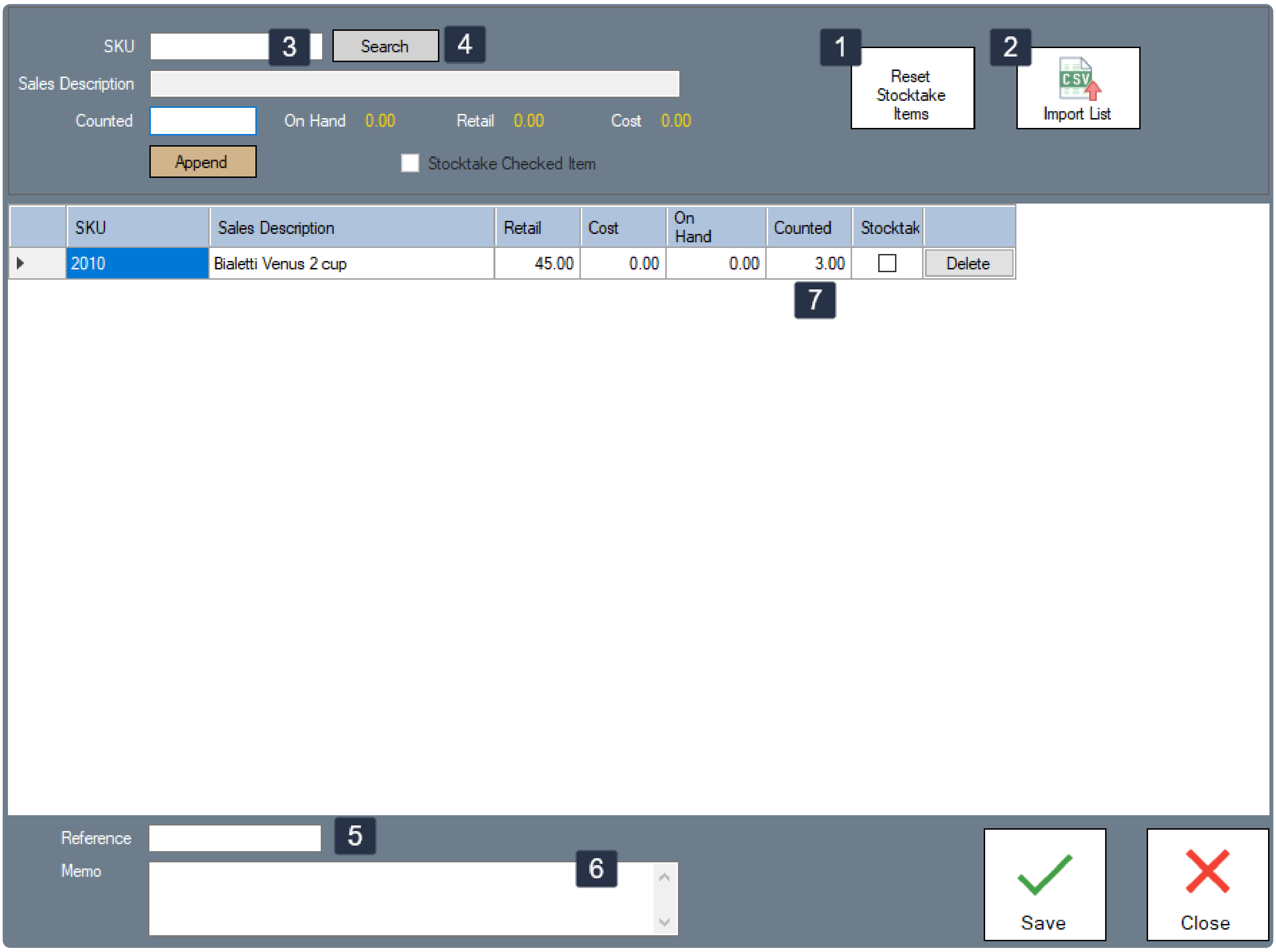
16. Inventory

16.1. Adjust Inventory

Open the ‘Adjust Inventory’ screen under Activities – Inventory tab


Activities
Reports
Help
Sales
Purchase
Inventory
Shift
Pos
Purchase
Receive
Adjust Inventory
Print Barcode
Quick Adjust Inventory
Period Discount

Adjust Inventory Screen


SKU
3
Search
4
1
Reset Stocktake Items
2
CSV
Import List
Sales Description
Counted
On Hand 0.00
Retail 0.00
Cost 0.00
Append
☐ Stocktake Checked Item
7
Reference
5
Memo
6
Save
Close

	SKU	Sales Description	Retail	Cost	On Hand	Counted	Stocktak	
▸	2010	Bialetti Venus 2 cup	45.00	0.00	0.00	3.00	☐	Delete

(1) When updating the Stock Adjustment, items that have been adjusted will be marked in the ‘Stocktake’ column so that you know it has been updated. The ‘Reset Stocktake’ button resets all items to be unmarked.

(2) Imports item list. The file format should be CSV and the file should have two columns: one titled ‘SKU’ and the other one as ‘Counted’.

(3) Shows the SKU of the selected item. You can type the item SKU and click the ‘Search’ button, or hit ‘ENTER’ on the keyboard to automatically select the item and retrieve the item details.

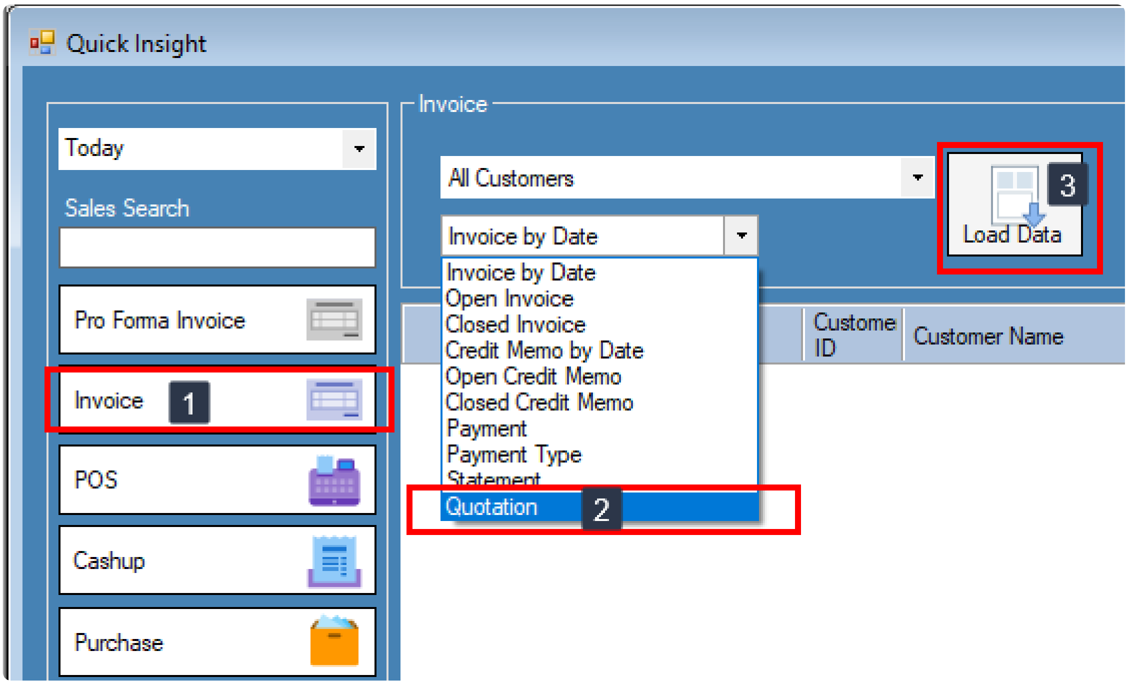
(4) Searches for the item to be adjusted.
(5) A reference is required to keep track of all stock adjustments.
(6) An optional memo can be added for further details to stock adjustments.
(7) The list of items to be adjusted.

17. Reports

18. How to

18.1. Find Quotation

Open the ‘Quick Insight’ screen


Quick Insight
Today
Sales Search
Pro Forma Invoice
Invoice
1
POS
Cashup
Purchase
Invoice
All Customers
Invoice by Date
Invoice by Date
Open Invoice
Closed Invoice
Credit Memo by Date
Open Credit Memo
Closed Credit Memo
Payment
Payment Type
Statement
Quotation
2
Load Data
3
Custome ID
Customer Name

Click the ‘Invoice’ button (1) then select ‘Quotation’ in the option box (2) and click the ‘Load Data’ button (3).

18.2. Add New Customer

You can add a new customer using three different methods.

- From the ‘Customer List’ screen.
- From the ‘Customer Lookup’ screen.
- From the Invoice/Sales Order/Quotation sales screen by selecting ‘Add Customer’ from the customer drop-down menu.

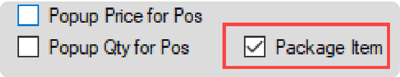
18.3. Add payment to invoice

How to add payment for invoice

18.4. Add a package item

Step 1 : Open the item edit screen

Step 2 : Select the ‘Package Item’ check box.

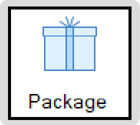


☐ Popup Price for Pos

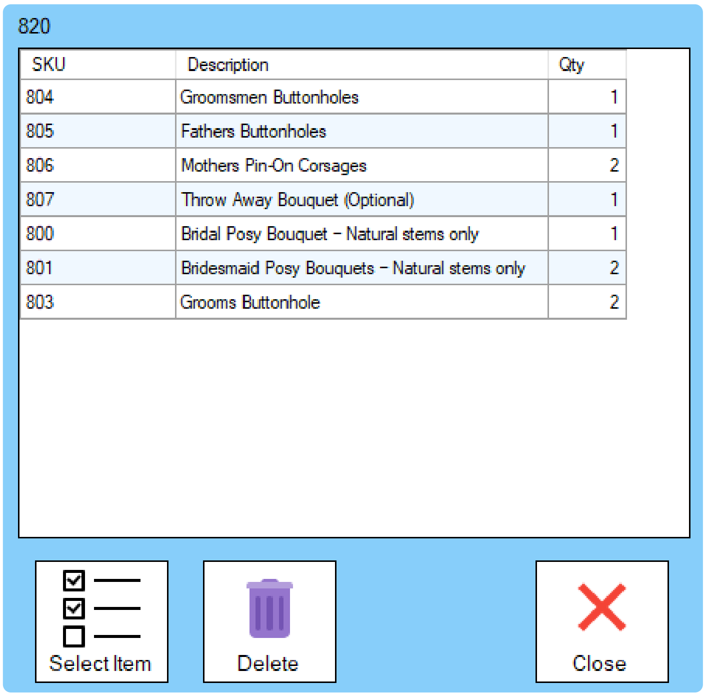
☐ Popup Qty for Pos

☑ Package Item

Step 3 : Click the ‘Package’ button at the bottom of the screen.



Step 4 : Click the ‘Select Items’ button then select the items that you want to include this package



820

SKU	Description	Qty
804	Groomsmen Buttonholes	1
805	Fathers Buttonholes	1
806	Mothers Pin-On Corsages	2
807	Throw Away Bouquet (Optional)	1
800	Bridal Posy Bouquet – Natural stems only	1
801	Bridesmaid Posy Bouquets – Natural stems only	2
803	Grooms Buttonhole	2

Step 5 : Double click the ‘Qty’ column to change the qty.

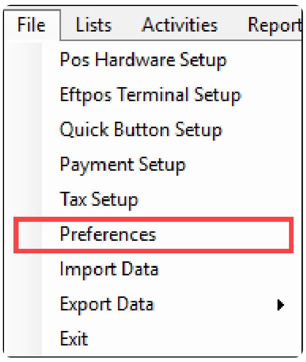
Step 6 : Click the ‘Close’ button (when you close the screen, the items will be saved automatically).

Step 7 : Click ‘Save’ in the item edit screen.

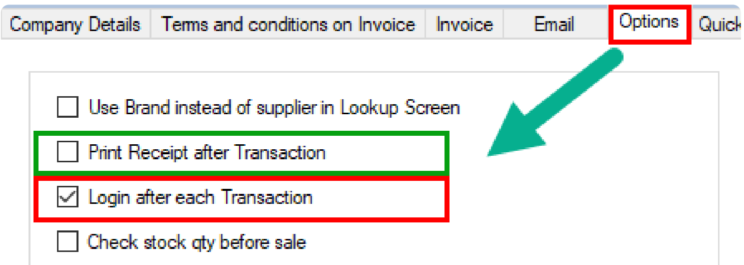
18.5. Skip login / print receipt after transaction

If you want to skip the login screen and/or you don’t want to print receipt after transaction, you can change it in ‘Preferences’.

Open ‘Preferences’ under the ‘File’ tab


File
Lists
Activities
Report
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Exit

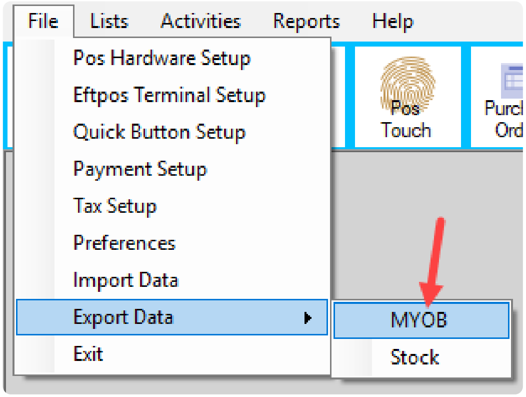
Select ‘Options’ and change the settings


Company Details
Terms and conditions on Invoice
Invoice
Email
Options
Quick

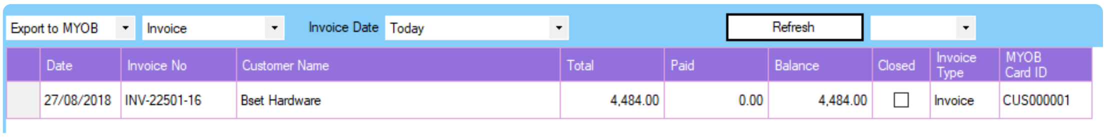
☐ Use Brand instead of supplier in Lookup Screen
☐ Print Receipt after Transaction
☑ Login after each Transaction
☐ Check stock qty before sale

18.6. Export Invoice to MYOB

1. Click Export Data/MYOB


File
Lists
Activities
Reports
Help
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Exit
MYOB
Stock
Pos Touch
Purcl Ord

2. Select the Invoice you want to export

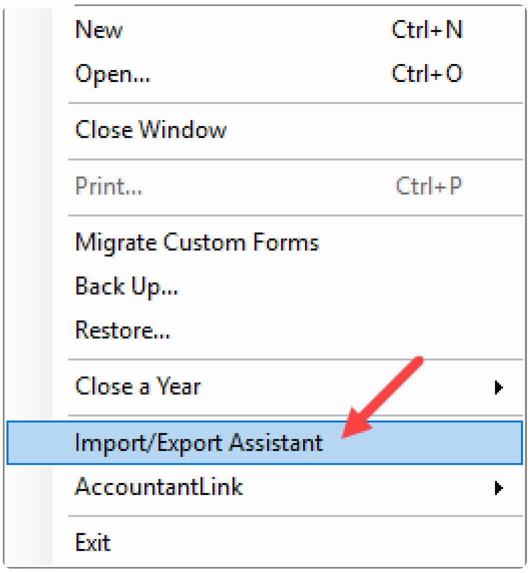

Export to MYOB
Invoice
Invoice Date
Today
Refresh

Date	Invoice No	Customer Name	Total	Paid	Balance	Closed	Invoice Type	MYOB Card ID
27/08/2018	INV-22501-16	Bset Hardware	4,484.00	0.00	4,484.00	☐	Invoice	CUS000001

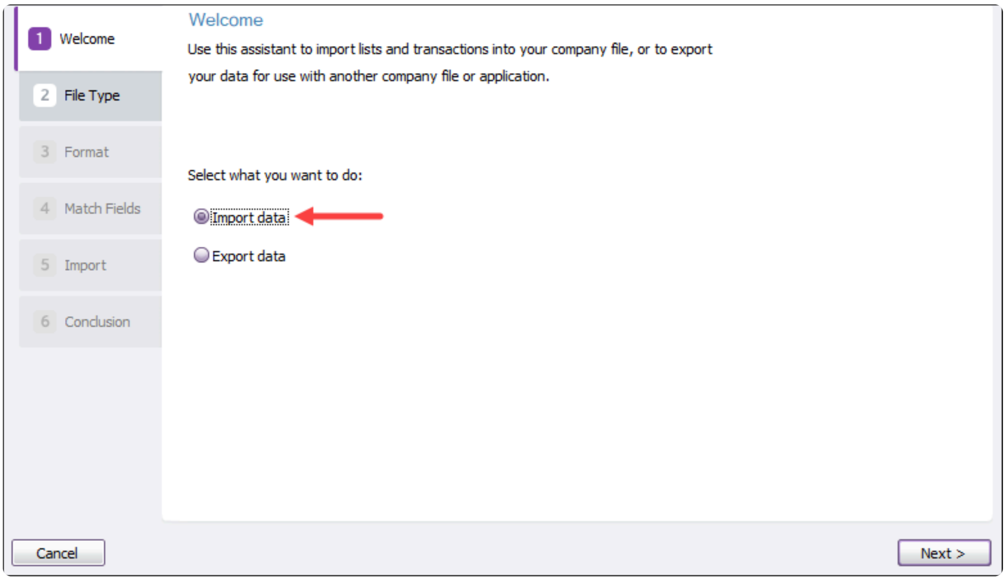
(Click the MYOB Card ID column to select the invoice.)

3. Import exported text file on MYOB

Step 1 : Click Import/Export Assistant


New Ctrl+N
Open... Ctrl+O
Close Window
Print... Ctrl+P
Migrate Custom Forms
Back Up...
Restore...
Close a Year
Import/Export Assistant
AccountantLink
Exit

Step 2 : Select Import Data


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Cancel
Next >

Welcome

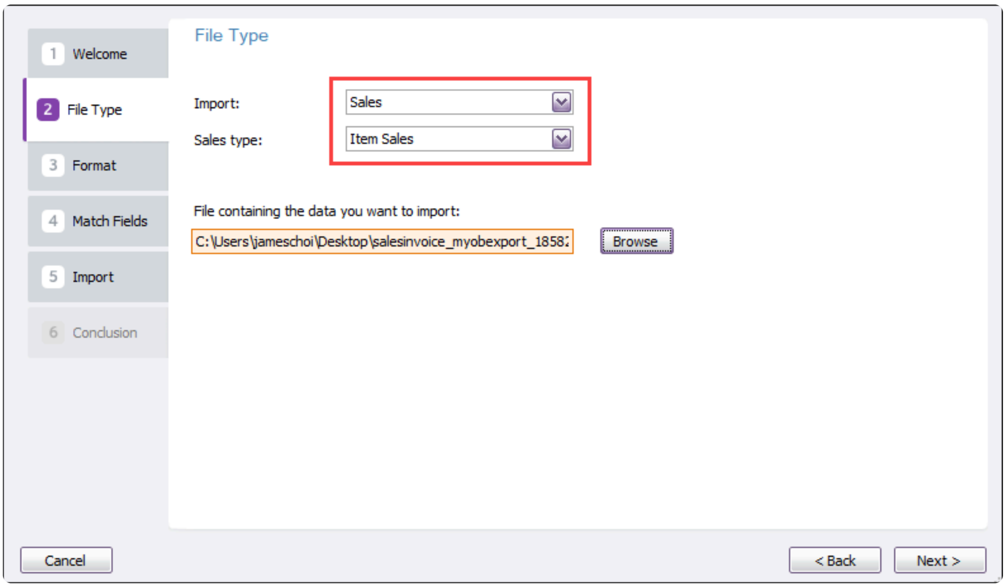
Use this assistant to import lists and transactions into your company file, or to export your data for use with another company file or application.

Select what you want to do:

● Import data

○ Export data

Step 3 : Select File Type (Set Import to Sales and Type to Item Sales)


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Browse
Cancel
< Back
Next >

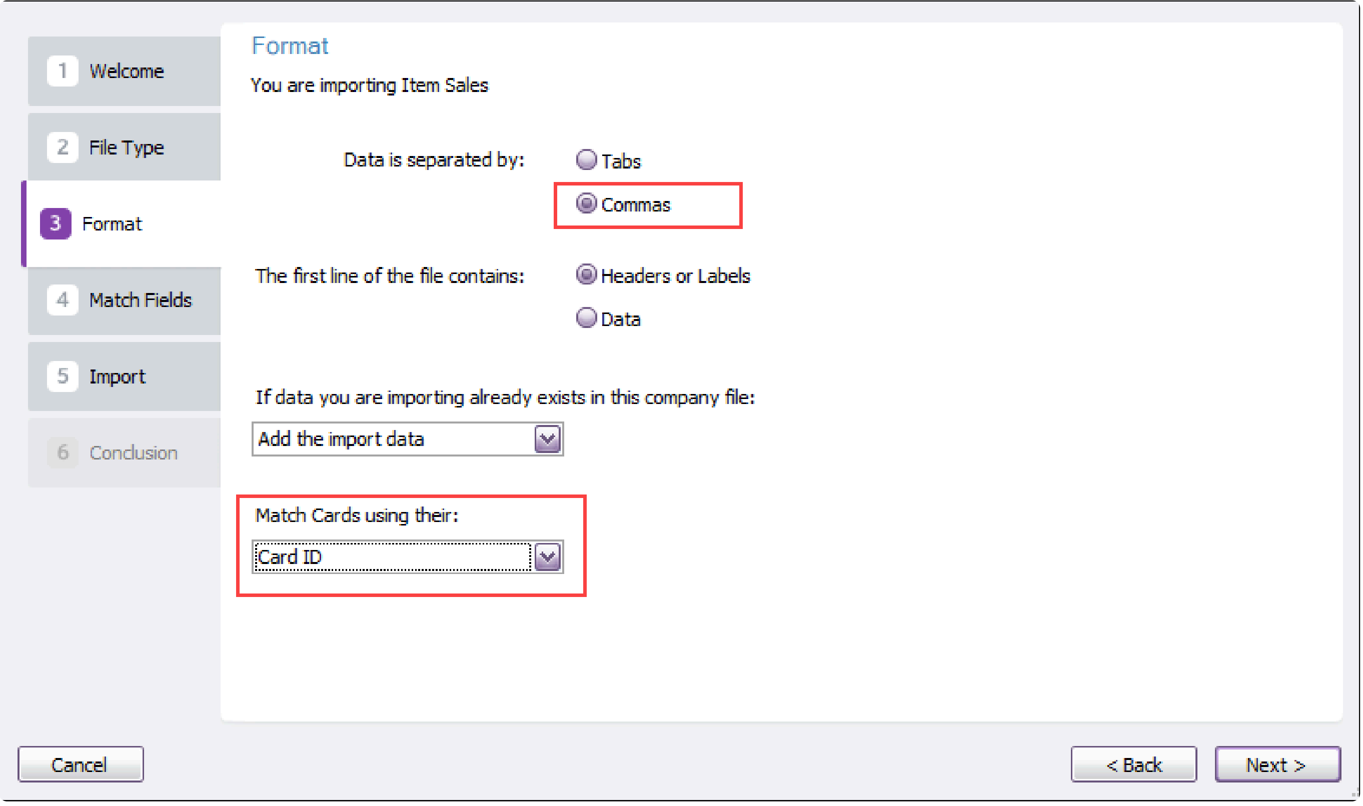
File Type

Import: Sales

Sales type: Item Sales

File containing the data you want to import: C:\Users\jameschoi\Desktop\salesinvoice_myobexport_18582

Step 4 : Select Format (Set 'Select Data is separated by' to ***Comma*** *and 'Match Card Using' to* ***Card ID****)*


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Cancel
< Back
Next >

Format

You are importing Item Sales

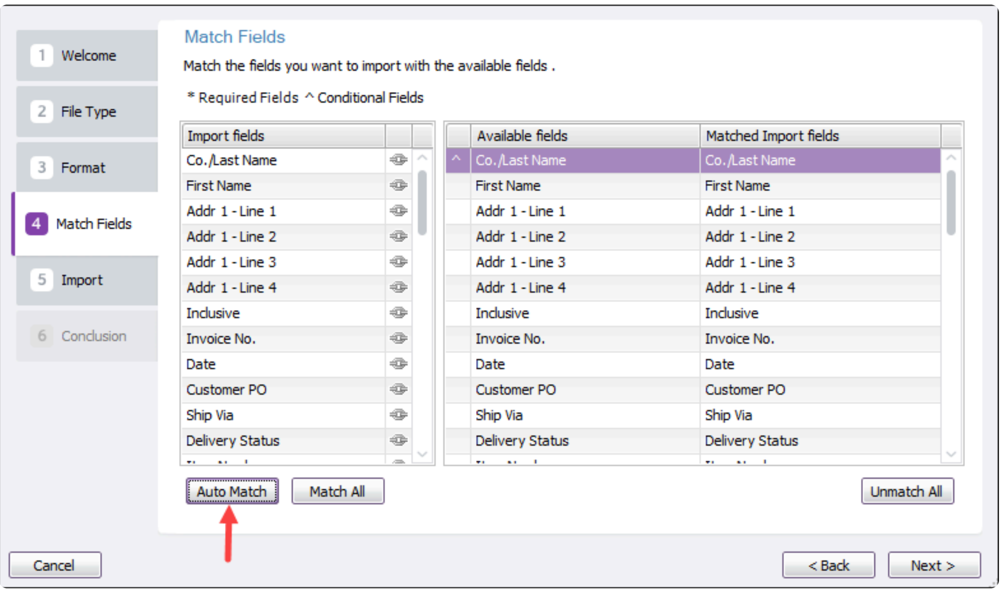
Data is separated by: ○ Tabs ● Commas

The first line of the file contains: ● Headers or Labels ○ Data

If data you are importing already exists in this company file: Add the import data

Match Cards using their: Card ID

Step 5 : Select Match Fields (Click Auto Match)


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Auto Match
Match All
Unmatch All
Cancel
< Back
Next >

Match Fields

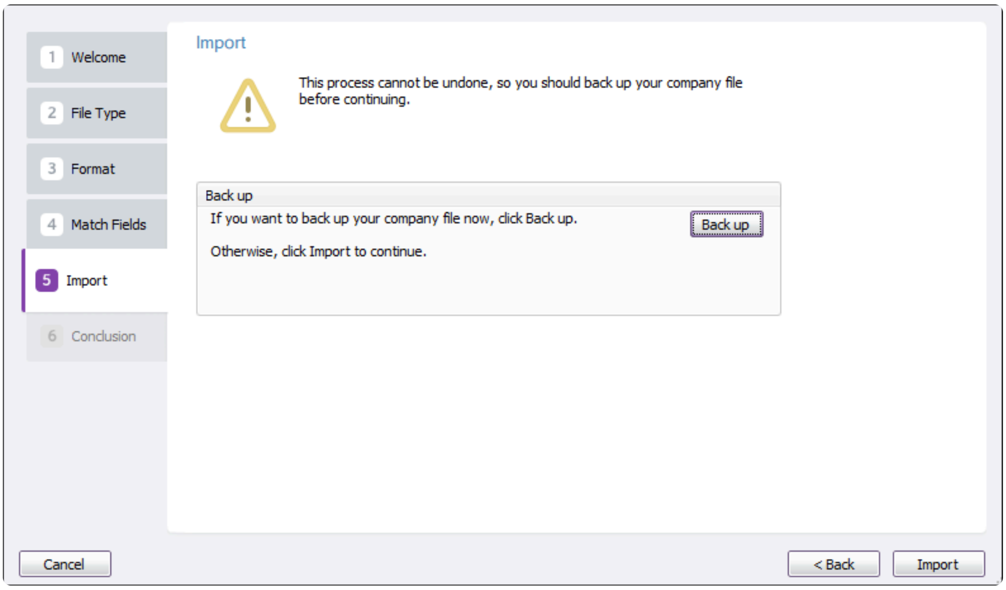
Match the fields you want to import with the available fields .

* Required Fields ^ Conditional Fields

Import fields
Co./Last Name
First Name
Addr 1 - Line 1
Addr 1 - Line 2
Addr 1 - Line 3
Addr 1 - Line 4
Inclusive
Invoice No.
Date
Customer PO
Ship Via
Delivery Status

	Available fields	Matched Import fields
^	Co./Last Name	Co./Last Name
	First Name	First Name
	Addr 1 - Line 1	Addr 1 - Line 1
	Addr 1 - Line 2	Addr 1 - Line 2
	Addr 1 - Line 3	Addr 1 - Line 3
	Addr 1 - Line 4	Addr 1 - Line 4
	Inclusive	Inclusive
	Invoice No.	Invoice No.
	Date	Date
	Customer PO	Customer PO
	Ship Via	Ship Via
	Delivery Status	Delivery Status

Step 6 : Import (Please back up the MYOB data file before importing)


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Import
Back up
Cancel
< Back
Import

This process cannot be undone, so you should back up your company file before continuing.

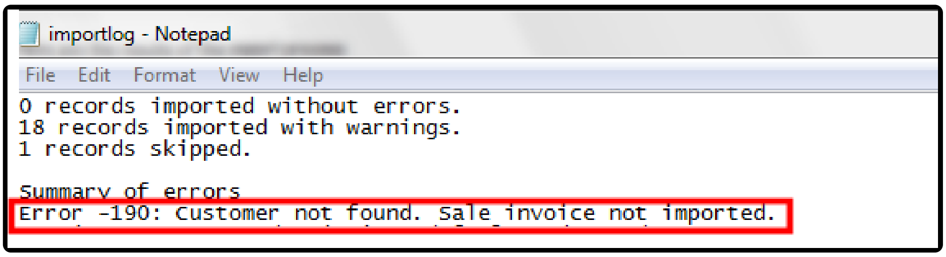
Back up

If you want to back up your company file now, click Back up.

Otherwise, click Import to continue.

3. Troubleshooting

(1) Error -190 : Customer not found.


importlog - Notepad
File Edit Format View Help

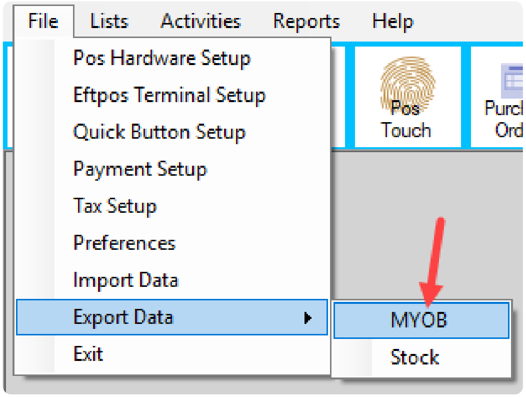
```
0 records imported without errors.
18 records imported with warnings.
1 records skipped.

Summary of errors
Error -190: Customer not found. Sale_invoice not imported.
```

Solution

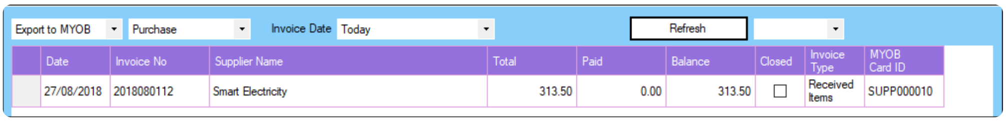
Please check the customer’s MYOB Card ID.

18.7. Export Purchase to MYOB

1. Click Export Data/MYOB


File
Lists
Activities
Reports
Help
Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Exit
MYOB
Stock
Pos Touch
Purcl Ord

2. Select the Purchase you want to export

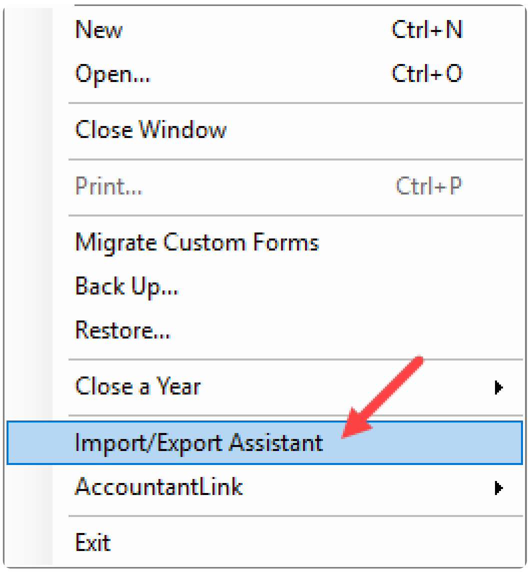

Export to MYOB
Purchase
Invoice Date Today

	Date	Invoice No	Supplier Name	Total	Paid	Balance	Closed	Invoice Type	MYOB Card ID
	27/08/2018	2018080112	Smart Electricity	313.50	0.00	313.50	☐	Received Items	SUPP000010

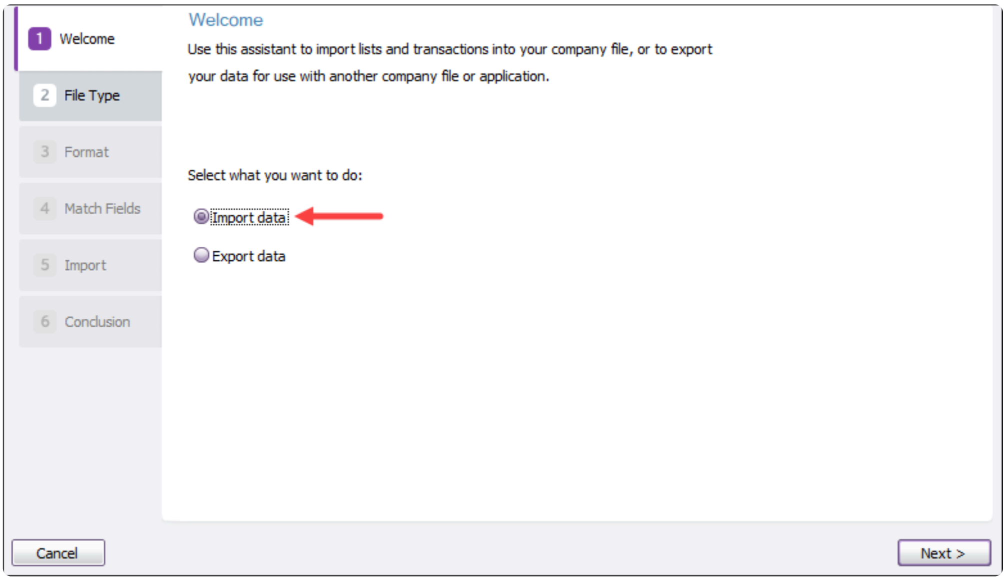
Click the MYOB Card ID column to select the purchase.

3. Import exported text file on MYOB

Step 1 : Click Import/Export Assistant


New Ctrl+N
Open... Ctrl+O
Close Window
Print... Ctrl+P
Migrate Custom Forms
Back Up...
Restore...
Close a Year
Import/Export Assistant
AccountantLink
Exit

Step 2 : Select Import Data


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Cancel
Next >

Welcome

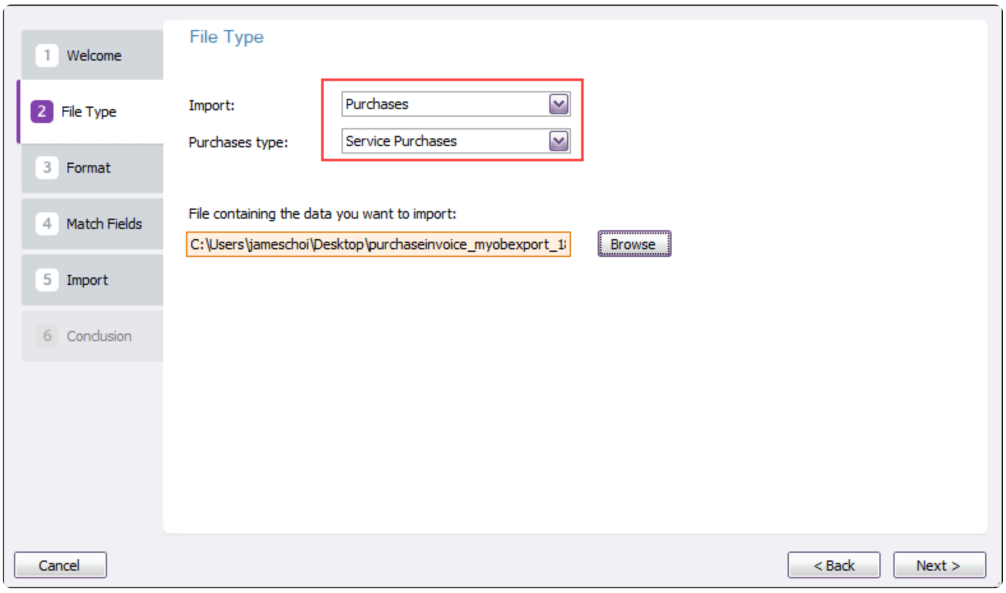
Use this assistant to import lists and transactions into your company file, or to export your data for use with another company file or application.

Select what you want to do:

● Import data

○ Export data

Step 3 : Select File Type (Set Import to Purchases and Type to Service Purchases)


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Browse
Cancel
< Back
Next >

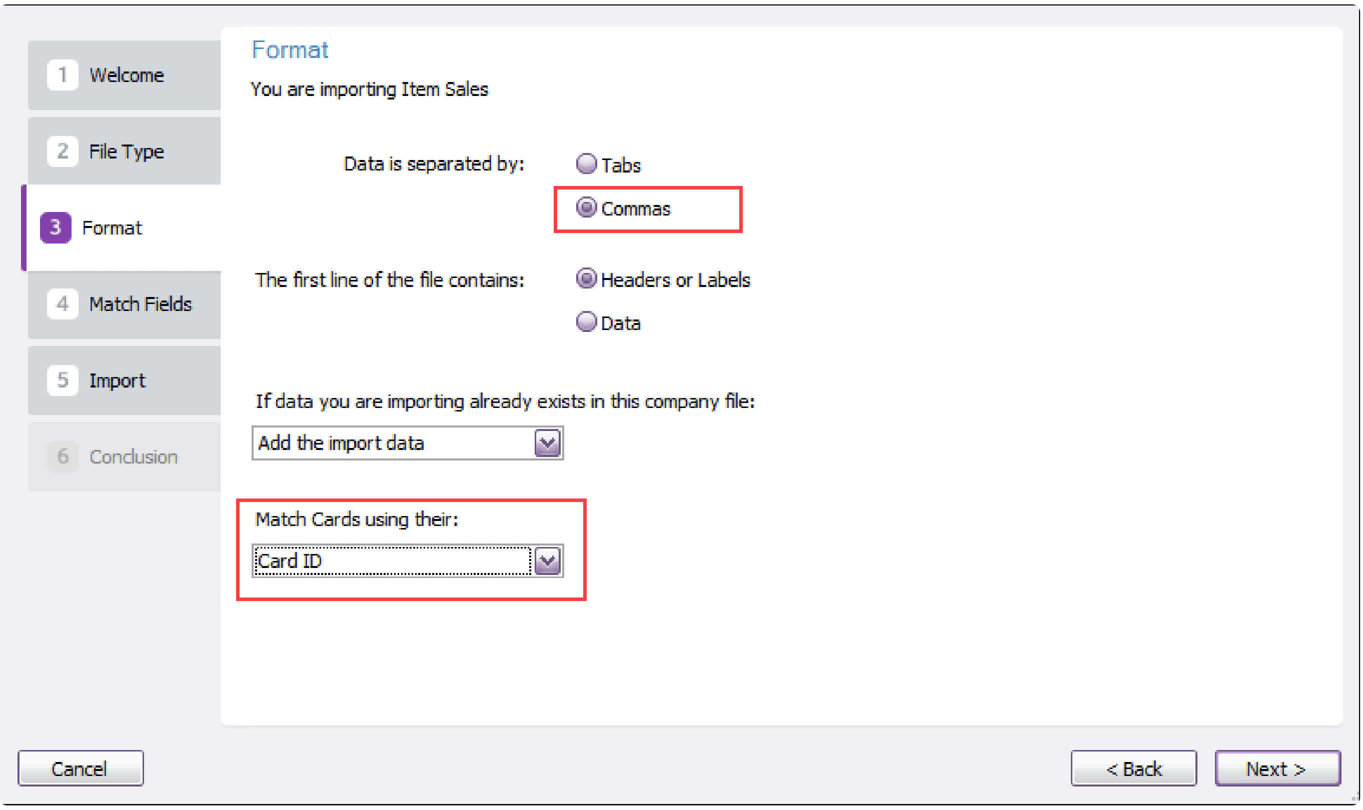
File Type

Import: Purchases

Purchases type: Service Purchases

File containing the data you want to import: C:\Users\jameschoi\Desktop\purchaseinvoice_myobexport_1

*Step 4 : Select Format (Set 'Select Data is separated by' to **Comma** and 'Match Card Using' to **Card ID**)*


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Cancel
< Back
Next >

Format

You are importing Item Sales

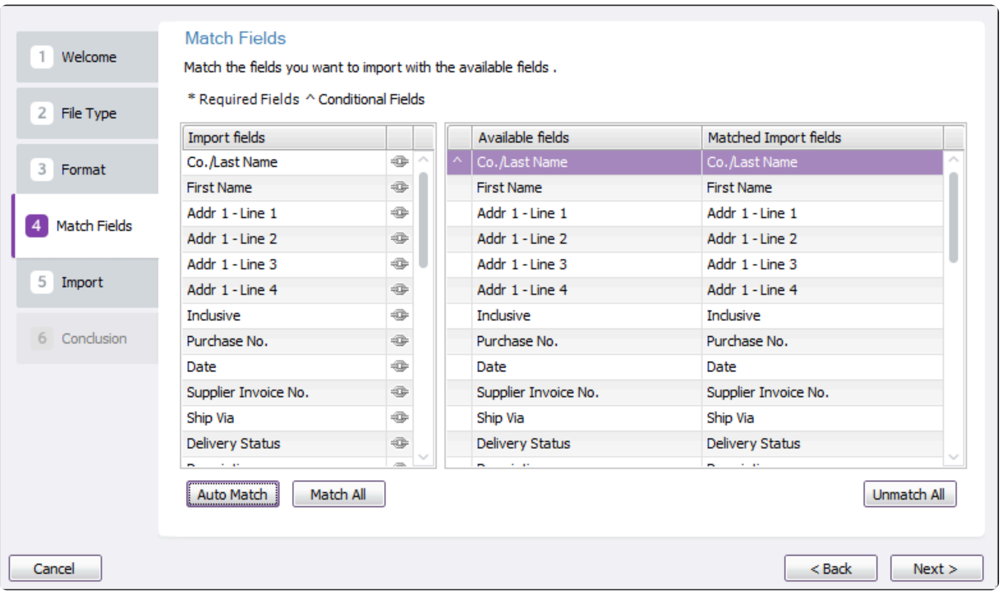
Data is separated by: ○ Tabs ● Commas

The first line of the file contains: ● Headers or Labels ○ Data

If data you are importing already exists in this company file: Add the import data

Match Cards using their: Card ID

Step 5 : Select Match Fields (Click Auto Match)


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Auto Match
Match All
Unmatch All
Cancel
< Back
Next >

Match Fields

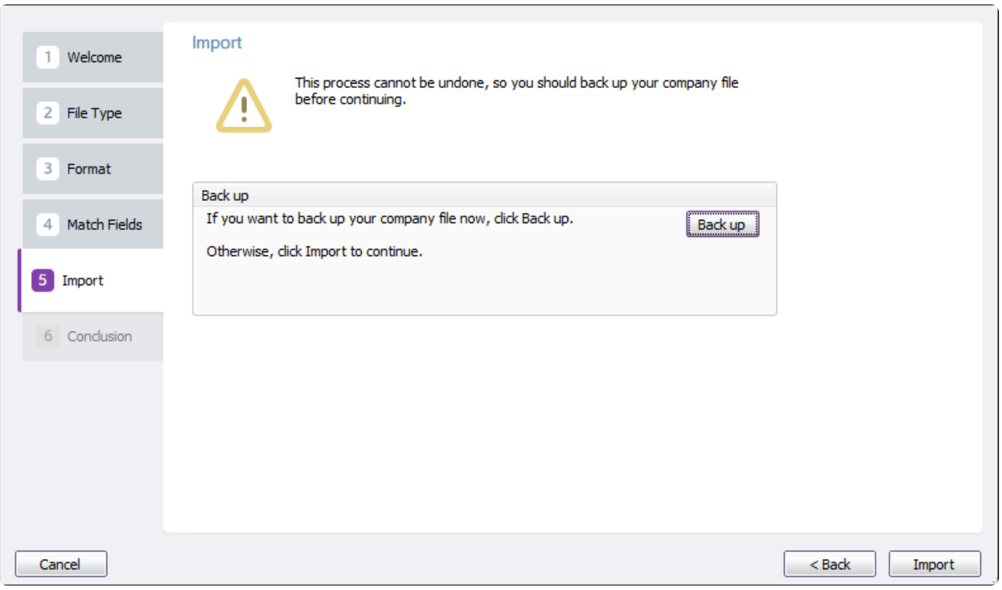
Match the fields you want to import with the available fields .

* Required Fields ^ Conditional Fields

Import fields
Co./Last Name
First Name
Addr 1 - Line 1
Addr 1 - Line 2
Addr 1 - Line 3
Addr 1 - Line 4
Inclusive
Purchase No.
Date
Supplier Invoice No.
Ship Via
Delivery Status

	Available fields	Matched Import fields
^	Co./Last Name	Co./Last Name
	First Name	First Name
	Addr 1 - Line 1	Addr 1 - Line 1
	Addr 1 - Line 2	Addr 1 - Line 2
	Addr 1 - Line 3	Addr 1 - Line 3
	Addr 1 - Line 4	Addr 1 - Line 4
	Inclusive	Inclusive
	Purchase No.	Purchase No.
	Date	Date
	Supplier Invoice No.	Supplier Invoice No.
	Ship Via	Ship Via
	Delivery Status	Delivery Status

Step 6 : Import (Please back up the MYOB data file before importing)


1 Welcome
2 File Type
3 Format
4 Match Fields
5 Import
6 Conclusion
Import
Back up
Cancel
< Back
Import

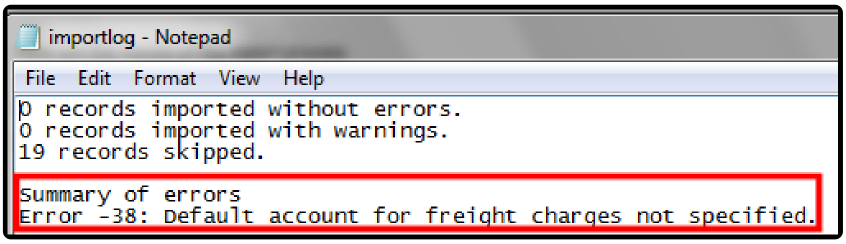
This process cannot be undone, so you should back up your company file before continuing.

If you want to back up your company file now, click Back up.

Otherwise, click Import to continue.

4. Troubleshooting

(1) Error -38 : Default Account for Freight charges not specified

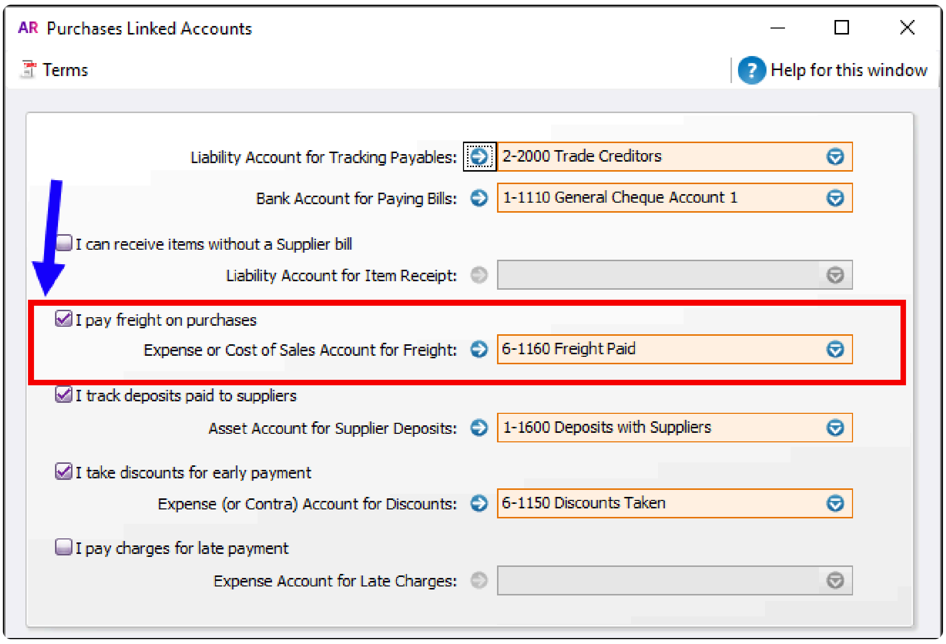

importlog - Notepad
File Edit Format View Help

```
0 records imported without errors.
0 records imported with warnings.
19 records skipped.

Summary of errors
Error -38: Default account for freight charges not specified.
```

Solution

Step 1 *: Go to the Setup menu and choose Linked Accounts then Purchases Accounts.*

Step 2 *: Tick the checkbox I pay Freight on Purchases and specify an account number.*


Purchases Linked Accounts
Terms
Help for this window

Liability Account for Tracking Payables: 2-2000 Trade Creditors

Bank Account for Paying Bills: 1-1110 General Cheque Account 1

☐ I can receive items without a Supplier bill

Liability Account for Item Receipt:

☑ I pay freight on purchases

Expense or Cost of Sales Account for Freight: 6-1160 Freight Paid

☑ I track deposits paid to suppliers

Asset Account for Supplier Deposits: 1-1600 Deposits with Suppliers

☑ I take discounts for early payment

Expense (or Contra) Account for Discounts: 6-1150 Discounts Taken

☐ I pay charges for late payment

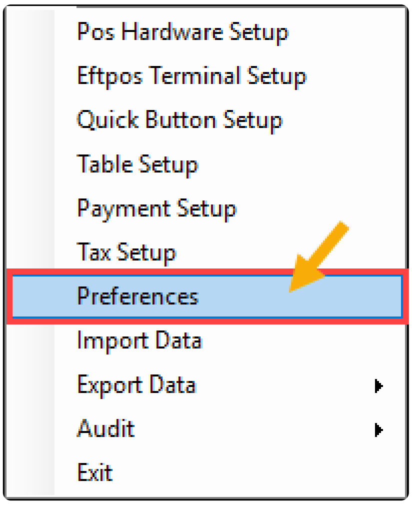
Expense Account for Late Charges:

18.8. Search in Customer History

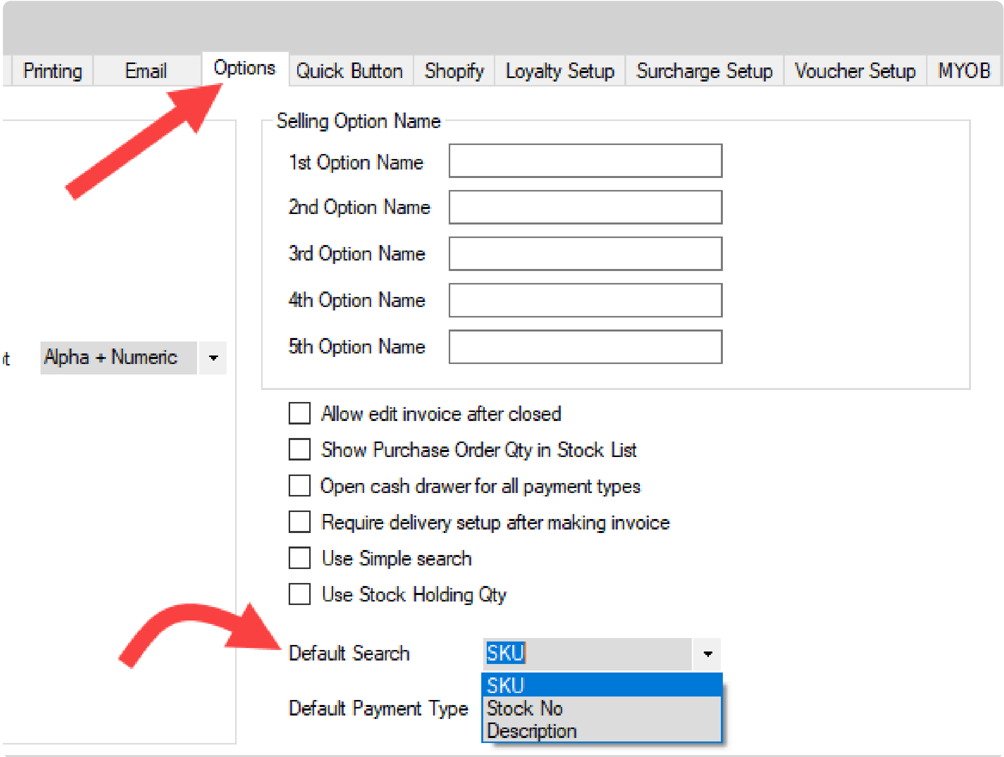
You can search the invoice no or reference in invoice.

18.9. Setup the default cursor starting point for Item search

Open ‘Preferences’ under the ‘File’ tab.


Pos Hardware Setup
Eftpos Terminal Setup
Quick Button Setup
Table Setup
Payment Setup
Tax Setup
Preferences
Import Data
Export Data
Audit
Exit

Select Options, then change the default search option.


Printing
Email
Options
Quick Button
Shopify
Loyalty Setup
Surcharge Setup
Voucher Setup
MYOB
Selling Option Name
1st Option Name
2nd Option Name
3rd Option Name
4th Option Name
5th Option Name
Alpha + Numeric
SKU
Stock No
Description

☐ Allow edit invoice after closed
☐ Show Purchase Order Qty in Stock List
☐ Open cash drawer for all payment types
☐ Require delivery setup after making invoice
☐ Use Simple search
☐ Use Stock Holding Qty

Default Search: SKU

Default Payment Type

19. Our Integrations

Westpac Tyro