SamPOS ER380

Installation & Operating Manual

Document version 11.01
= for software version 3.2.0 =

Polling & Inventory Software
Exclusively for the
Samsung ER-380

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Fort Myers, Fl 33913
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TABLE OF CONTENTS

1. Installing SamPOS+ Polling & Inventory Software 5

1.1. CD Installation 5

2. Setup of Basic Environment 6

2.1. On First Start of SamPOS+: 6

2.1.1. Speed Test 6

2.1.2. Set Up Administrative User 6

2.1.3. Configure initial ECRs 7

3. Setup of SamPOS+ 8

3.1. Registration 8

3.2. Basic Configuration 9

3.2.1. General Setup 9

3.2.2. Stores 10

3.2.3. ECR Stations 11

3.2.4. Account Periods 13

3.2.4.1. Closing off an Accounting Period 13

3.3. SamPOS+ Orientation 14

3.4. SamPOS+ Main Screen 16

3.5. ECR Setup 17

3.5.1. Editing an ECR 17

3.5.2. Adding a new ECR 18

3.5.3. Sending Setup Data to ECRs 19

3.5.3.1. Memory Allocation 20

3.5.3.2. Receipt Preamble & Post amble 21

3.5.3.2.1. Programming using SamPOS+ 21

3.6. PLU File 22

3.6.1. For Existing Sites 22

3.6.1.1. Building PLU File from existing ECR data 22

3.6.2. For New Sites (and Manual Entry) 23

3.6.2.1. Adding Groups 23

3.6.2.2. Adding PLUs 24

3.6.2.2.1. Building PLU file from a Text File 24

3.6.2.2.2. Manual Entry 26

PLU Flags 27

Barcodes 28

3.6.2.2.3. Selling Prices 29

Generate from Cost 29

Importing Text File 32
3.6.2.2.4. SamPOS+ Tax Rate Flags 33
3.6.3. Reporting Families 34
3.6.3.1. Adding Families 34
3.6.3.2. Assigning Families 35
3.7. Configure Media Lists 36
3.8. Backing up the data 37
3.8.1. Backup History 37
3.8.2. Back-up Directory 37
3.8.3. Doing a Backup 38
3.8.4. Restoring from a Backup 38
3.9. Employee Management 39
3.9.1. Administrative User 39
3.9.2. Adding a new employee 40
3.9.2.1. General Details 40
3.9.2.2. Adding a picture 40
3.9.2.3. Back office access 41
3.9.2.3.1. Security restrictions 41
3.9.2.4. Till Clerk 42
4. Working With SamPOS+ 43
4.1. Importing Sales 43
4.1.1. Manually retrieving sales 43
4.1.2. Automatic retrieve of sales 45
4.2. Inventory 46
4.2.1. Reorder Levels 46
4.2.2. Stock Adjustments 47
4.2.3. Inventory Count 49
4.2.4. Inventory Transfers 51
4.3. Setting Product Specials 52
4.3.1. Product Special Reporting 53
4.4. Spreadsheets Reports 54
4.4.1. Customizing spreadsheets 57
4.4.2. Grouping spreadsheet data 58
4.4.3. Saving a Report Style 58
4.5. Program Maintenance 59
5. Appendix 60

5.1. Wiring Diagrams 60
5.1.1. Direct connect (no modem) 60
5.2. IRC Topology 60
5.2.1. Direct 60
5.3. Export label information from Sampos+ 61
5.4. Technical Notes for initial set-up of ER-380 62
5.4.1.1. Serial Communications 62
5.4.1.2. Tax Settings 63
6. Index 64

1. Installing SamPOS+ Polling & Inventory Software

IMPORTANT: Before installing, close all applications as following completion of the installation you must reboot the computer.

1.1. CD Installation

a) Insert SamPOS+ CD into the CD-ROM drive.

NOTE: there will be 10-20 seconds delay with Auto-Run.

b) If the auto-run capability is turned off, double-click on the '**My Computer**' icon on the desktop, followed by the CD-Rom drive. Usually this is D: or E: drive, but can vary depending on the local system.
c) Double-click on the file named "**Setup.exe**", this will install the SamPOS+ Polling and Inventory software, as well as the communications package which connects SamPOS+ to the electronic cash registers (ECRs).
d) The installation now commences. Setup will check your system files and if necessary update them.

NOTE: You will be prompted by the Setup program to specify an installation directory and program group name. It is strongly recommend that you accept the defaults which Setup presents.

e) After Setup has finished you **MUST** reboot the computer.

IMPORTANT: after installing SAMPOS+ make sure you set the Windows Date Format to "dd/mm/yyyy". Otherwise, your sales reports will not display any PLU data.

Using Windows XP™ go to:
CONTROL PANEL → Regional and Language Options
Using Windows 98™ go to:
SETTINGS → CONTROL PANEL → Regional and Language Options

IMPORTANT NOTE ON WINDOWS™ REGIONAL SETTINGS

Make sure you have the WINDOWS™ Regional Settings correct for your part of the world. For example, if you are in Australia, ensure that Windows is set-up to use language "English (Australian)"; and location "Australia".

2. Setup of Basic Environment

2.1. On First Start of SamPOS+:

2.1.1. Speed Test

On first start up of SamPOS+, the system will do a speed test to ensure the Computer meets the minimum requirements to run the program. The minimum system requirements are as follows:

Operating systems: Windows™ 98, NT4 with SP4, 2000 with SP1, and XP

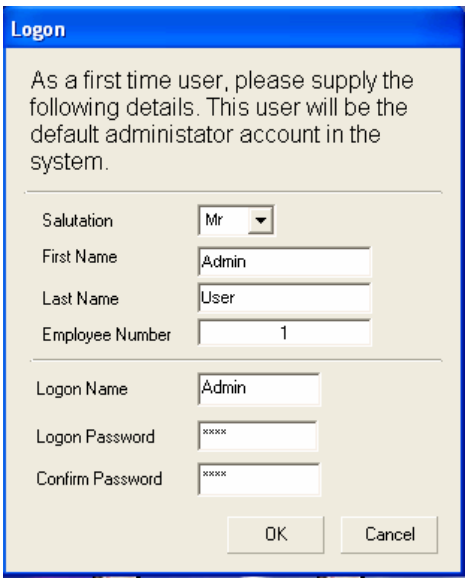
> **NOTE: when used with 2000 or XP operating systems the Overstocked and Replenishment Report become available**.

Hardware: CPU – Intel™ Celeron 500 / AMD™ Duron 500, or greater
RAM – 128Mb, or greater
17" Monitor is recommended

2.1.2. Set Up Administrative User

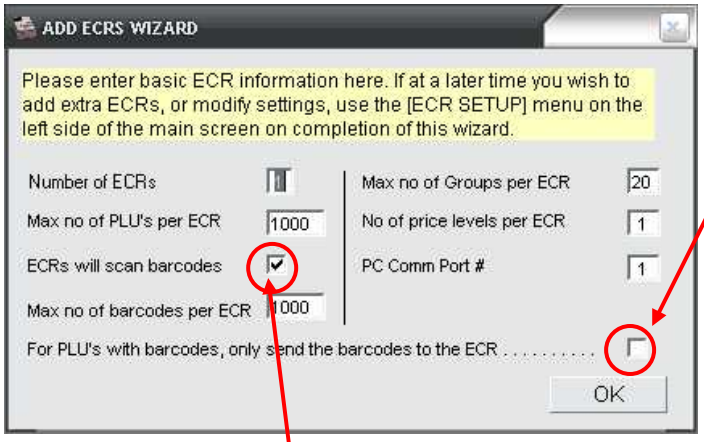
Then you will be prompted to enter a user for logging on to SamPOS+. This will be the Administrative user; this user will have access to every section of SamPOS+. You are required to enter a **First Name**, a **Last Name**, a **User Name**, and a **Password** and then to enter that password a second time to confirm it.

TIP: when you assign an initial user name and password, it is advisable that you write it down and keep it in a safe place.



2.1.3. Configure initial ECRs

The next screen asks you to setup the SamPOS+ settings for one or more ECRs, including the file size parameters. SamPOS+ must know the maximum number of PLUs and barcodes each unit can handle; the number of groups, price levels, and the communications port on the computer which will be used to upload and download the ECRs.



NOTE: When a product has both a PLU number AND barcode(s), this tick box will only send the barcode(s) to the ECR. This is done to save memory space in the ECR(s).

TIP: if the ECRs will <u>NOT</u> be used to scan barcodes, you can un-tick the box 'ECRs will scan barcodes'; this deactivates the field immediately below where the maximum number of barcodes per ECR will be set.

<u>IMPORTANT</u>: the settings in this screen are global for all ECRs. However, you can edit each ECR specifically by going to the '**Setup & configure registers**' option which is found on the '**TODAY**' menu.

3. Setup of SamPOS+

The following sections of this guide are to be used in conjunction with the setup instructions in sections one and two.

NOTE: Do Section 1 before you do Section 2 or Section 3.

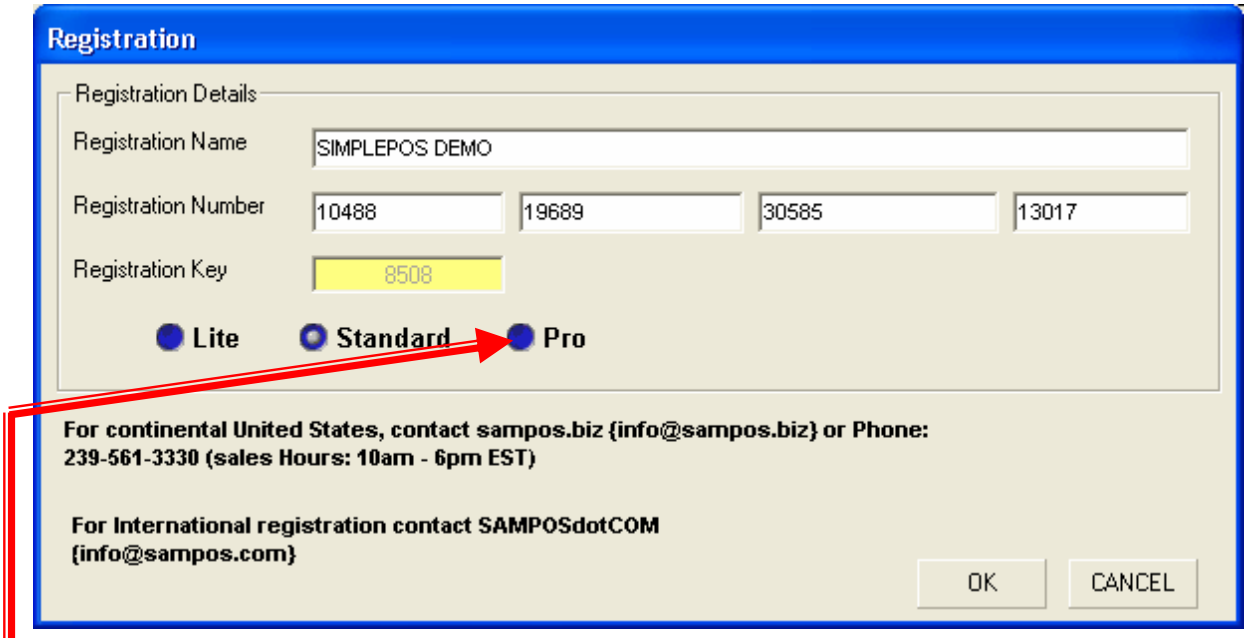
3.1. Registration

Call your SamPOS+ dealer to receive a registration number.

At the registration screen under the Help menu, provide the number in the box shaded yellow. This number is used to calculate your registration number. The registration number is unique to your computer, thus SamPOS+ *must* be installed on the computer that will be used to communicate with the ECR(s). You will also be asked to provide a Registration Name when requesting your registration. Give this name to your dealer **EXACTLY** (case sensitive) as you want it entered; as this name will be used to generate the registration number.

HELP → Registration

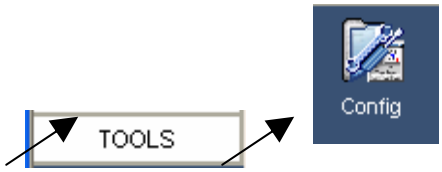
Please have ready your proof of purchase such as an invoice or order number and the serial number on the disk.



NOTE: multi-ECR Station / multi-store configurations are only available on the PRO Version of Sampos+. You must obtain this registration to activate this feature. Contact your reseller for details.

3.2. Basic Configuration

3.2.1. General Setup



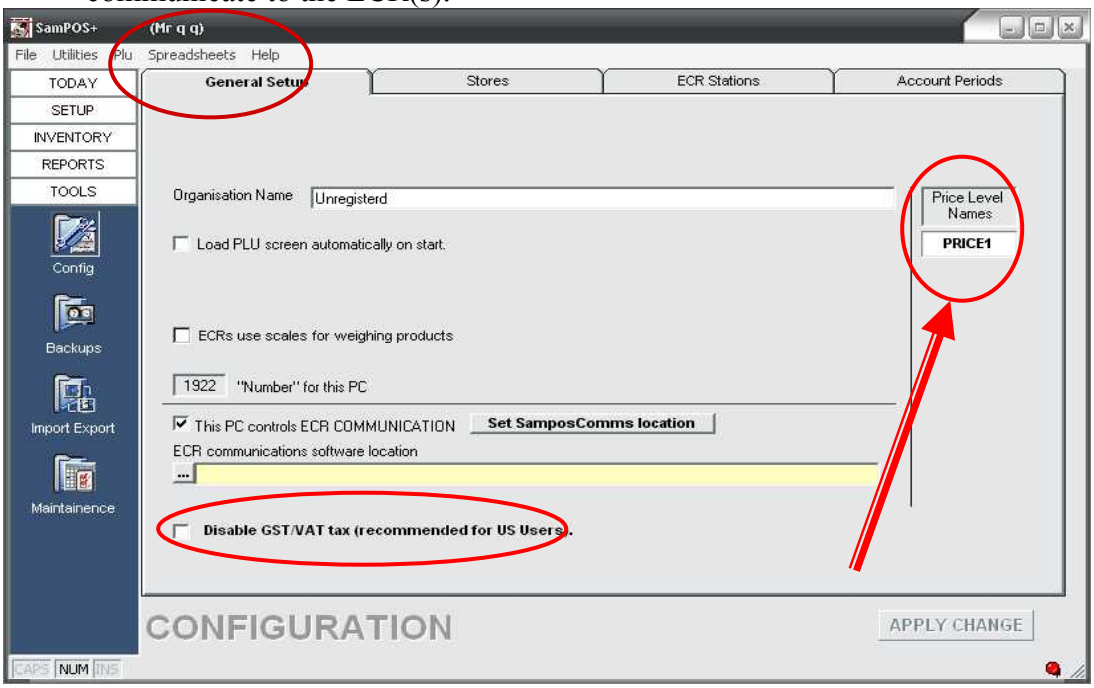
To access the basic configuration options go to **TOOLS → Config → General Setup**. This tab contains the following system-wide settings:

a) **Organisation Name**: Enter the registration name of the business – i.e. the name you use in the **REGISTRATION** screen. Refer to section above– **REGISTRATION** to find this information.

b) **Load PLU screen automatically on start-up**: When you tick this box SamPOS+ will automatically open the PLU screen each time the program is started.

c) **ECRs use scales for weighing products**: If the ECR(s) will be used with a scale attached, this box activates the scale-specific flags on the PLU screen.

d) **'This PC controls ECR communications'**: Sets this computer as the "***communicating PC***". In a system with more than one computer, only one (1) can communicate to the ECR(s).



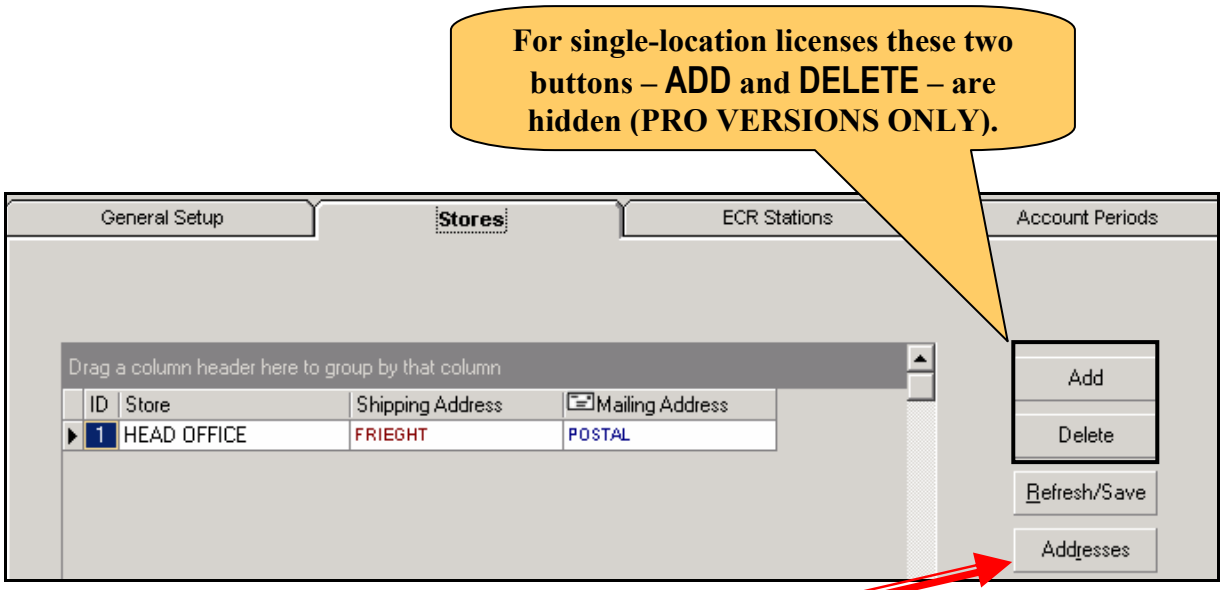
e) **Price Level Names**: Each price level can be given a name here. The number of price levels which appears depends on the maximum number of levels set for the ECR(s).

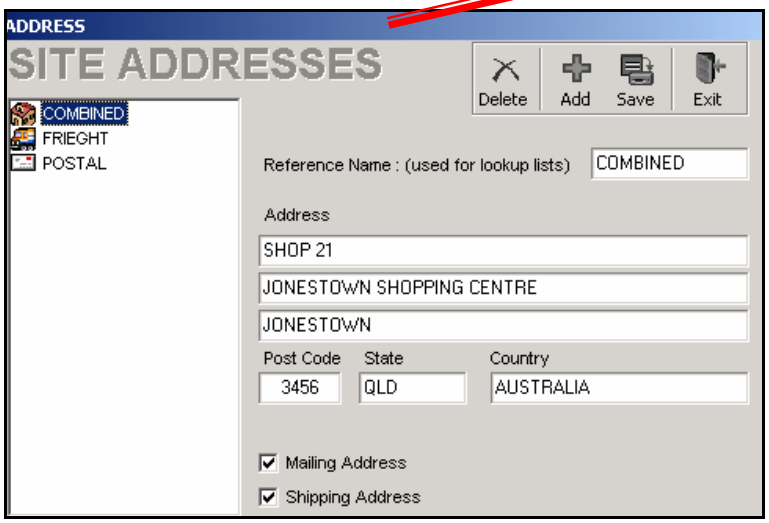
f) **Disable GST / VAT tax**: For US customers only, this will disable the tax columns in sales reports

3.2.2. **Stores**

A **STORE** refers to a large entity which can contain single, or multiple ECR Stations. Generally, the Store will be the actual business while different areas within the business – Front Counter, Deli, and Take-away – will be referred to as ECR Stations. To access STORES go to **TOOLS** → **Conf** → click the **STORES** tab

NOTE: if you do not have a "multi-location" license (Pro versions only) you will be restricted to one (1) STORE. Refer to the previous section – REGISTRATION for details about upgrading a Single-location registration.





Addresses for STORES are optional, and are used to define:

i) **Postal addresses;**
ii) **Shipping (or Street) addresses; and**
iii) **Combined addresses.**

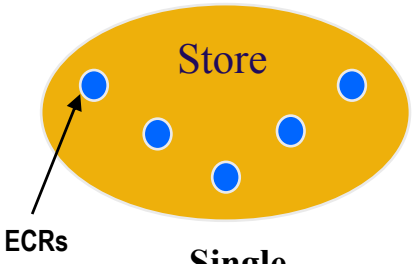
3.2.3. **ECR Stations**

An 'ECR Station' is a way of grouping Electronic Cash Registers (ECR's) for reporting purposes. A Store can have single or multiple ECR Stations each with single or multiple ECRs. To setup ECR Stations go to: **TOOLS** → **Config** → then go to the **ECR Stations** tab. (Limited by PC com ports)

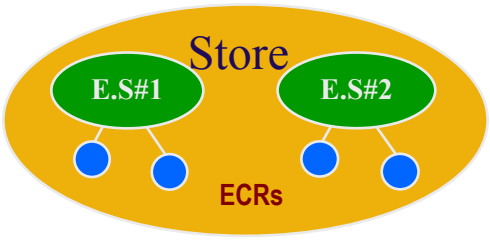
NOTE: inventory levels for Standard and Pro versions are kept for each ECR Station. Stock will deplete from the ECR Station where the relevant ECR is location.

For example, if ECR Station #1 has two ECRs – numbered 1 to 2 – then sales of products on ECRs 1 and 2 will deplete inventory from ECR Station #1.

Whereas, ECRs 3 and 4, located in ECR Station #2 would deplete inventory from ECR Station #2.

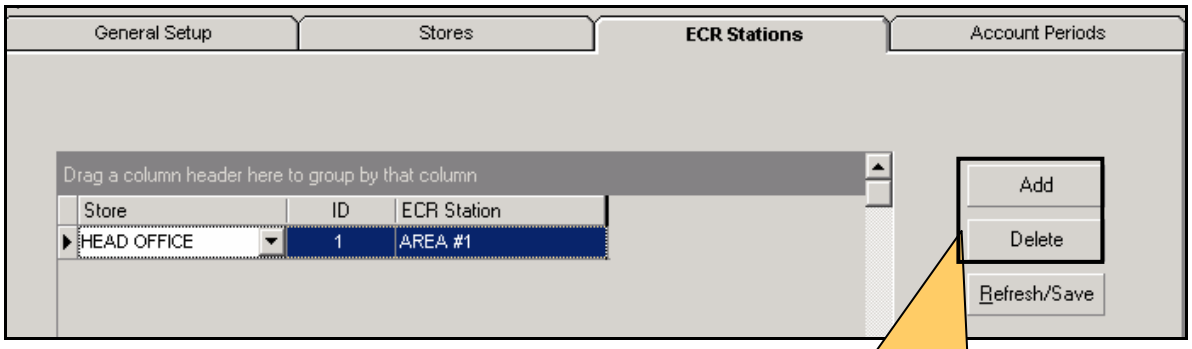


Single Location

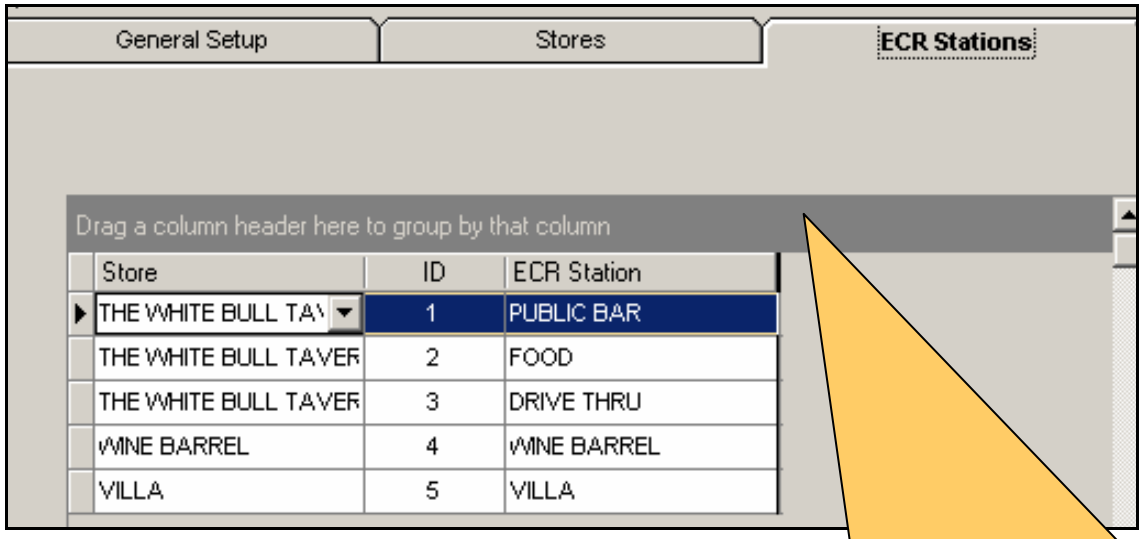


Multiple Locations

NOTE: if you do not have a "multi-location" license (PRO VERSION ONLY) you will be restricted to one (1) ECR Station. Refer to the previous section – REGISTRATION for details about upgrading a Single-location registration.



For single-location licenses these two buttons – ADD and DELETE – are hidden.



Change the ECR Station name in the 'ECR Station' column to whatever you wish. e.g. '**PUBLIC BAR**'.

In the 'Store Column', select the Store that this ECR Station is in. e.g. '**The White Bull Tavern**'.

To add additional ECR Stations, press the '**Add**' button **(if you have a multiple location license (Pro Version), that is)**.

NOTE: If you are unable to access newly entered Stores, you may have to press the 'Refresh' button on the right-hand side of the screen.

3.2.4. Account Periods

Accounting Periods are used for reporting purposes. Generally, most businesses divide their trading year into months – starting in either January or July depending whether they wish to use financial, or calendar year. The most of common of all accounting period configurations uses the 1st of each month as the start date. But, this does not have be the case with SamPOS+.

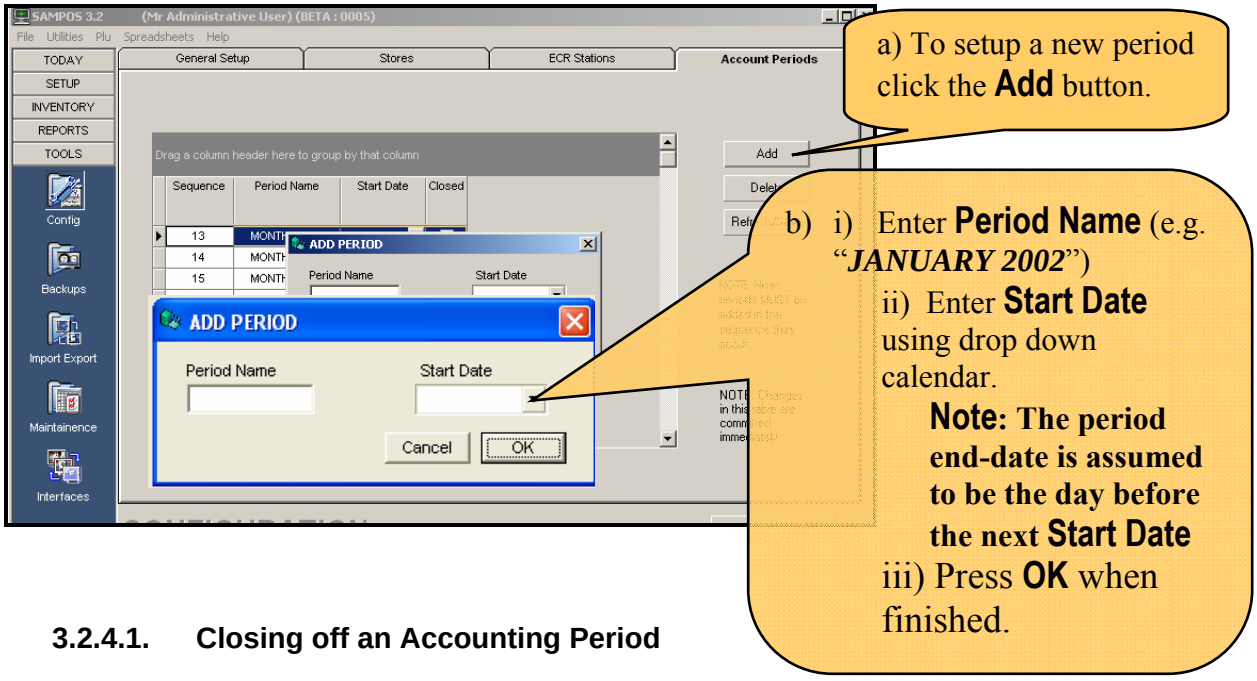
Nor, is the user restricted to using the 1st of the month as the start date.

SamPOS+ allows any account period model to be configured – standard month based, weekly, quarterly, even daily!!!! However, it must be remembered you need to be able to manage the chosen account period model before you set it up. This means you must be able to keep the system information up-to-date in terms of stock adjustments, inventory counts, transfers, and sales.

IMPORTANT: make sure you can manage your chosen account period model.

To access the account period configuration screen, go to: **TOOLS** → **Config** → then click on the **ACCOUNT PERIODS** tab.

IMPORTANT: accounting periods MUST be entered in chronological (date) order.

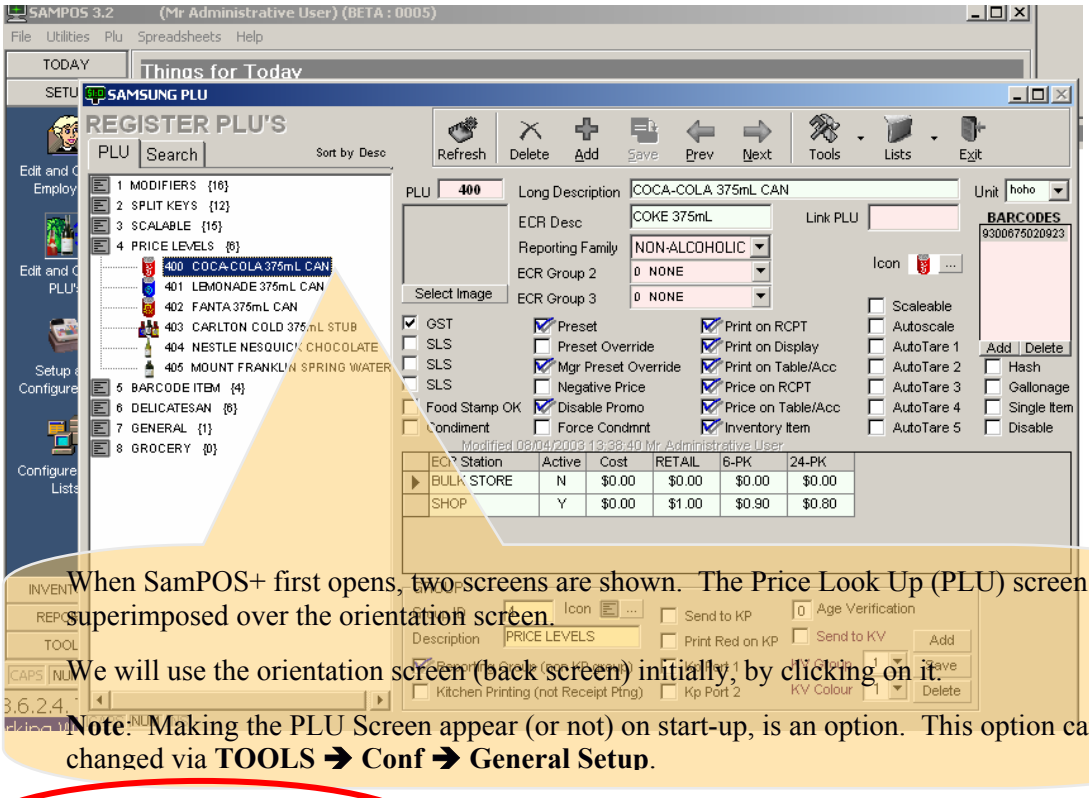


3.2.4.1. Closing off an Accounting Period

When an accounting period has been completed SamPOS+ will automatically close it off before the sales are retrieved for the new period.

3.3. SamPOS+ Orientation

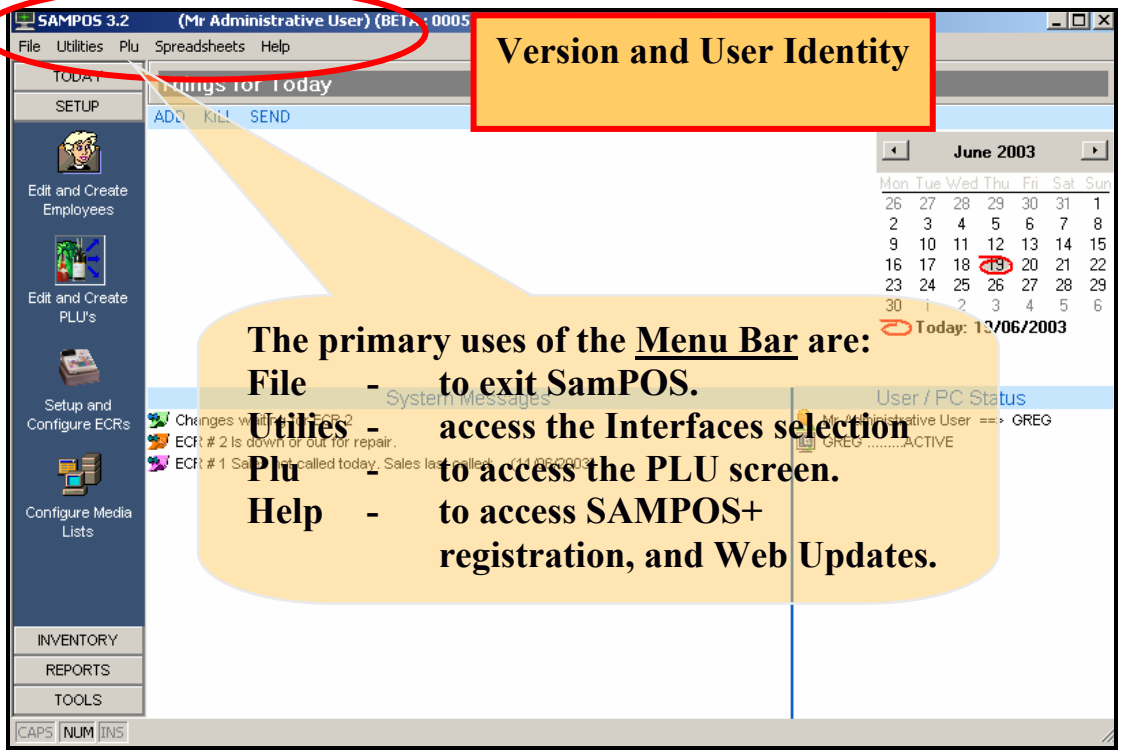
Once the configuration process is complete, you will need to restart SamPOS+ to activate the changes. The screen below will then appear upon reboot of the SamPOS+ program.



When SamPOS+ first opens, two screens are shown. The Price Look Up (PLU) screen is superimposed over the orientation screen.

We will use the orientation screen (back screen) initially, by clicking on it.

Note: Making the PLU Screen appear (or not) on start-up, is an option. This option can be changed via **TOOLS ➔ Conf ➔ General Setup**.

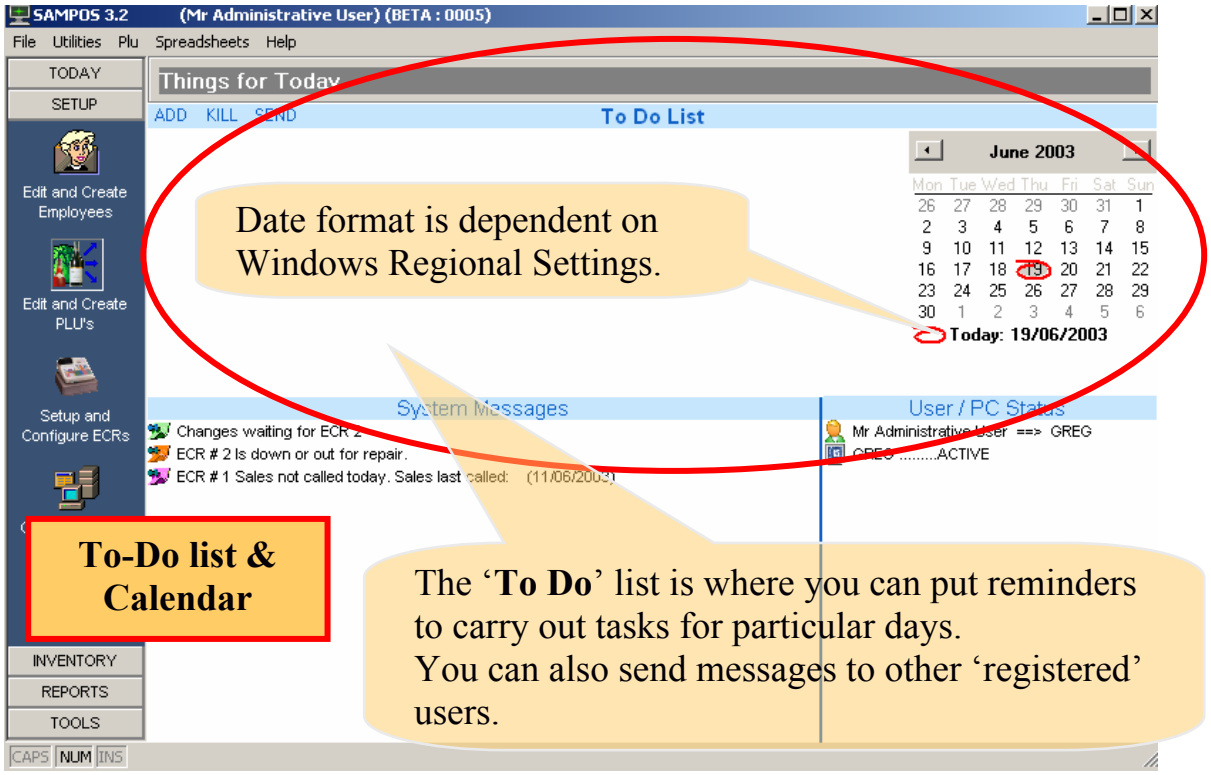


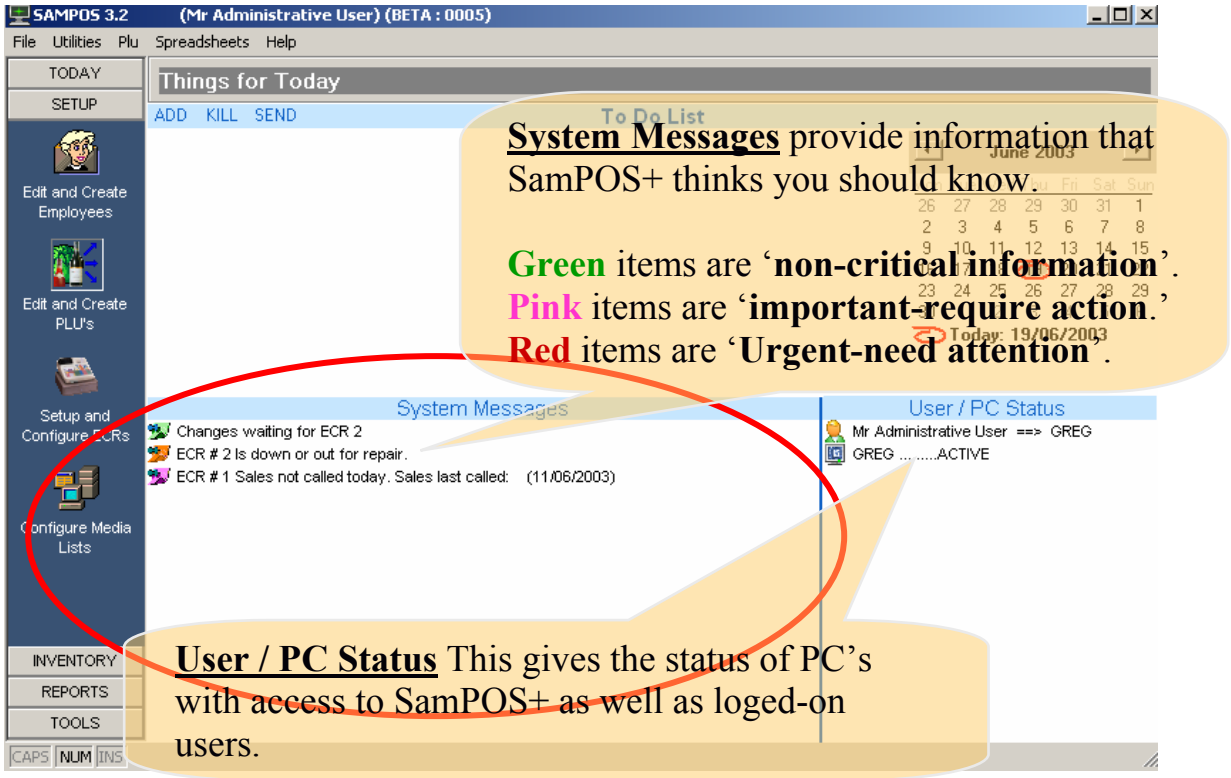
Version and User Identity

The primary uses of the Menu Bar are:

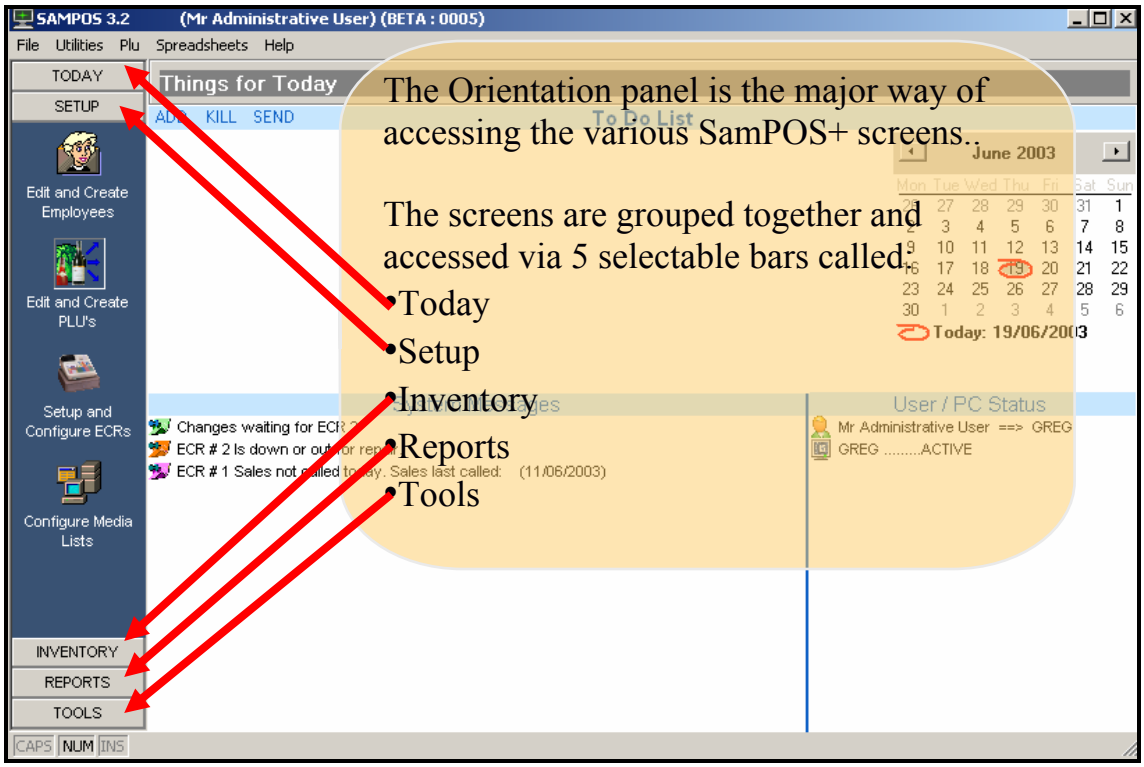
File - to exit SamPOS.
Utilies - access the Interfaces selection
Plu - to access the PLU screen.
Help - to access SAMPOS+ registration, and Web Updates.

TODAY → Today's Notes and To Do List

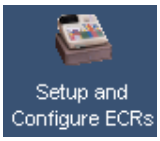




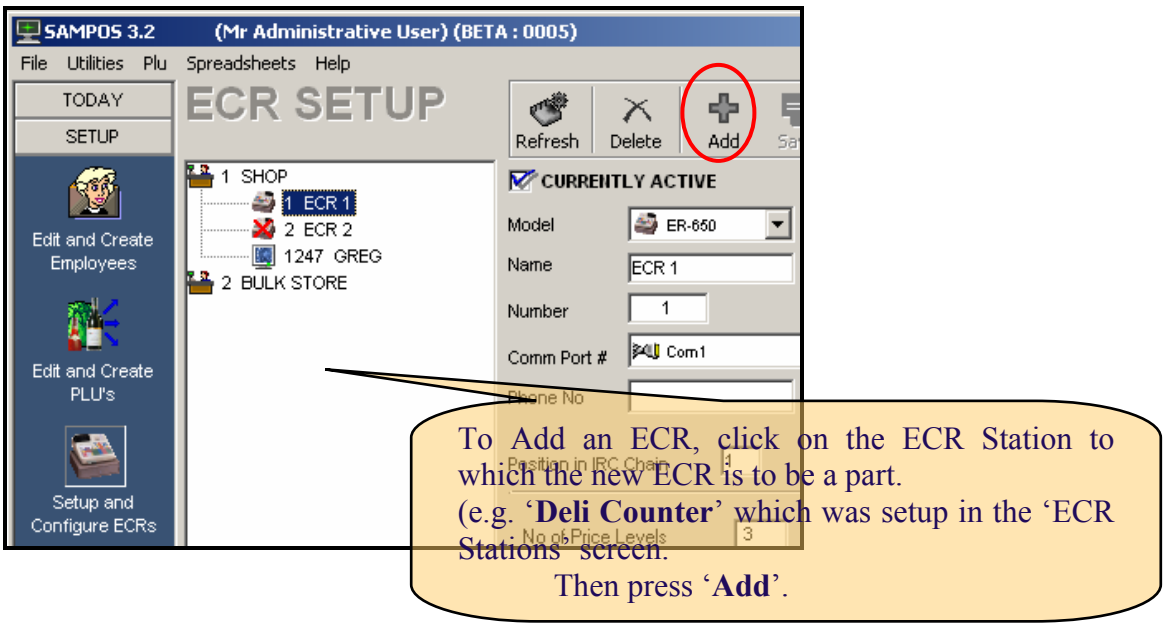
3.4. SamPOS+ Main Screen



3.5. ECR Setup



After you have completed the initial ECR setup instructions (section 3.1.3. ECR Stations), you may wish to edit the details or add new registers. To add registers or edit current register details you access the option '**Setup & configure ECRs**' which is found on the "**SETUP**" menu.



3.5.1. Editing an ECR

If you are editing an ECR configuration, simply make the desired change, '*tab*' off the field, and then press the '**Save**' button on the toolbar.

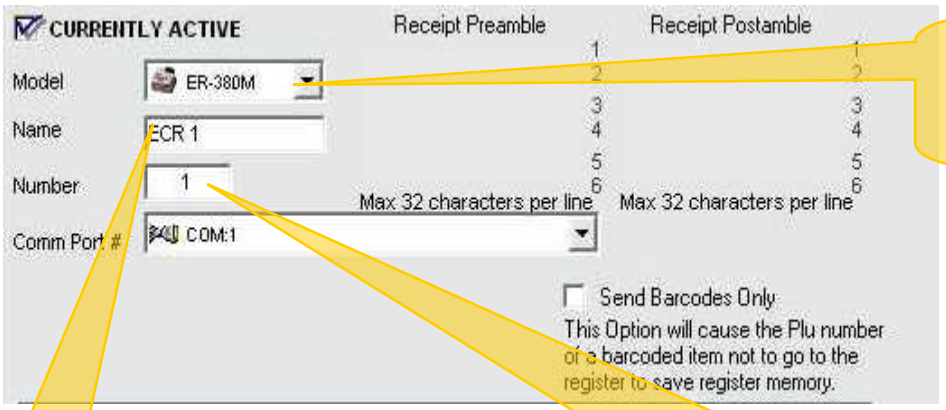
TIP: the 'Save' button will activate when there has been a change made to a register. Also, if you select another registers and a change has been made, SamPOS+ will prompt you to save the current record.

3.5.2. **Adding a new ECR**



a) Select the ECR Station where you want the ECR to reside.

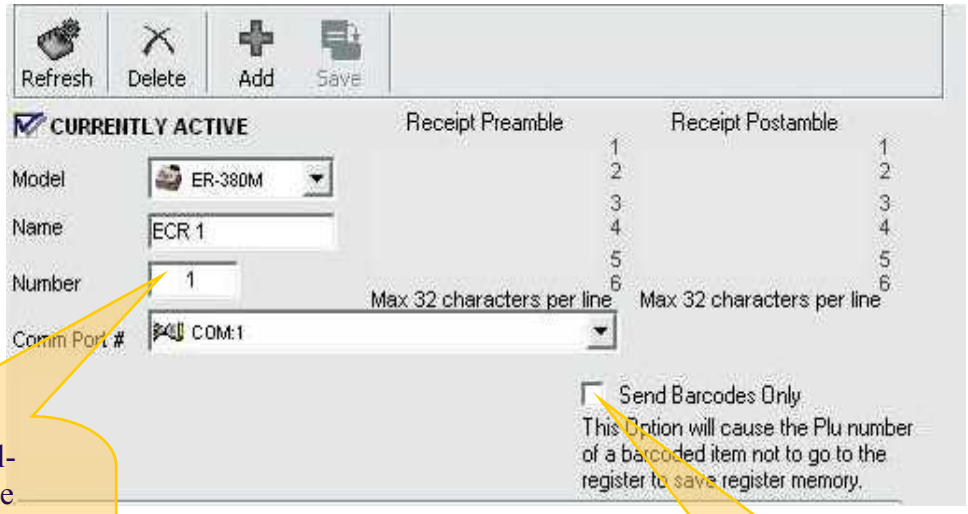
b) Press "**Add**" button found on the toolbar to add a new ECR.



c) **Model:** the user must select the correct model number of the new ECR.

d) **Name**: this setting will define the name of the new ECR. Eg "Deli 1"

e) **Number:** this number must be the unique number of the ECR. This number is obtained by turning the ECR key to the **PGM** position; selecting option double-zero (00); then option seven (7) **MACHINE NUMBER**.

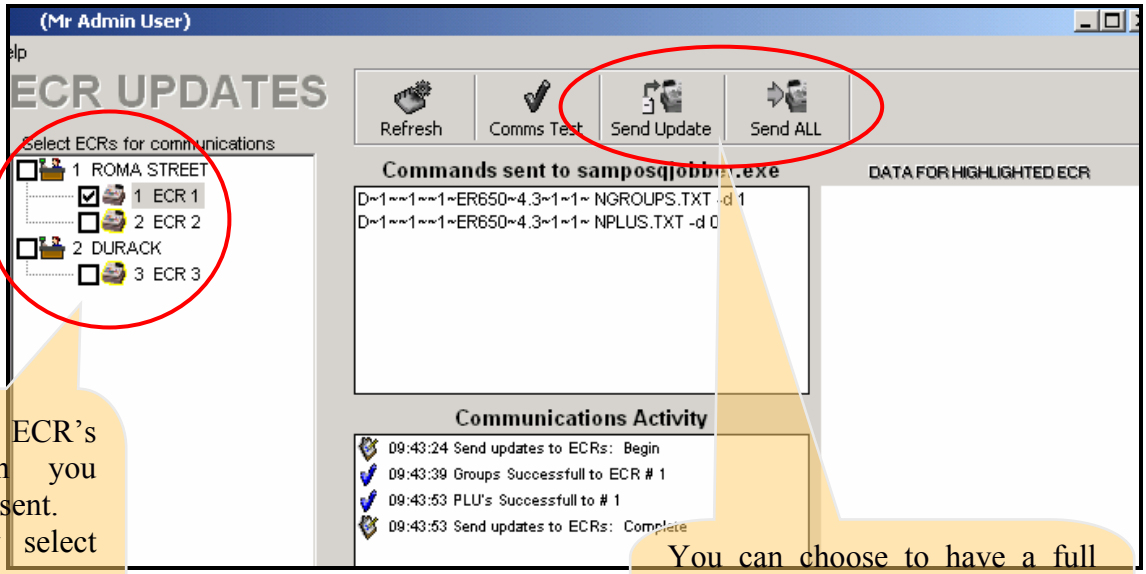


f) **Comm. Port #:** This pull-down menu identifies all the configured communications ports - both direct and modems. The operator will need to select the correct communications port, or device from the list.

i) **Send Barcodes only:** Only barcodes, not barcodes plus PLU numbers will be sent to the ECRs.

3.5.3. Sending Setup Data to ECRs

TODAY → Send Changes and Updates to ECRs



Select the ECR's to which you want data sent. You may select ECR's individually or all ECR's within an ECR Station.

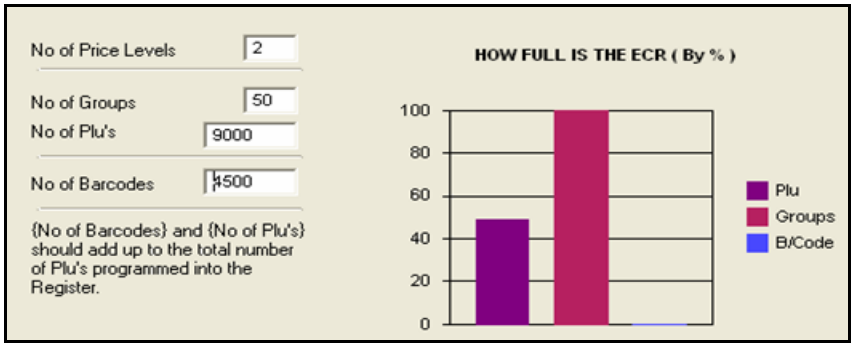
You can choose to have a full download which will completely replace all data in the selected ECR's, or just an update. (Update is faster).

3.5.3.1. Memory Allocation

The following settings relate to how the file structure in the ECR has been set-up. These must be manually entered because the ECR does not send back this information to SamPOS+.

IMPORTANT: the ECR provides no feedback regarding the current capacity of its files. Furthermore, if the ECR does not have sufficient memory allocated for the amount of data which is being sent, the user receives no warning from the unit. Extra PLUs, over and above the current allocation, are discarded from the ECR.

To remedy, have your ECR technician correct the memory allocation – refer to section Error! Reference source not found. **– Memory Allocation – so it matches Sampos+ and resend the data.**



IMPORTANT: when your technician makes a change to the file structure of the ECR they **MUST** also change these settings.

g) NUMBER OF PRICE LEVELS: The number of price levels programmed into the register.

h) NUMBER OF GROUPS: The maximum number of Groups programmed into the register.

i) NUMBER OF PLUs: The maximum number of PLUs programmed into the register.

j) NUMBER OF BARCODES: The maximum number of Barcodes programmed into the register.

NOTE: As PLUs and Barcodes are held together in the same table in the ECR, these last two parameters must combine to equal the maximum number of PLUs set-up in the ECR. For example, if the ECR PLU Table is set to a maximum of 4000, then the SamPOS+ PLU and Barcode parameters must add together to equal this limit (e.g. 2000 and 2000, 3000 and 1000, 2500 and 1500 etc).

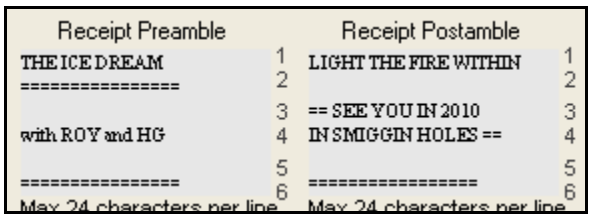
3.5.3.2. Receipt Preamble & Post amble

3.5.3.2.1. Programming using SamPOS+

If you are using RS-232 (otherwise known as serial communications) then you can program the preamble and post-amble from within SamPOS+. Remember you only have thirty-two (32) characters per line, and there are six (6) lines available. You cannot press ENTER on the keyboard to move to the next line. Rather, simply left-click onto the new line.

c) **Receipt Preamble**: Click in box, and type your message for the top of the receipt (i.e.. Receipt header). You are limited to six (6) lines, and maximum of thirty-two (**32**) characters per line.

d) **Receipt Post amble**: Click in box and type your message for the end of the receipt (I.E. Receipt footer). Once again, you are limited to six (6) lines, and a maximum of thirty-two (**32**) characters per line.



Once you have completed setting up the new ECR, press the "**Save**" button to commit the changes.



3.6. PLU File

Open the PLU screen, by selecting the option '**PLU Screen**' from the menu drop-down called '**PLU**' at the top of the main screen. Or, selecting "**Edit / Create PLUs**" from the **SETUP** menu. SamPOS+' PLUs and Groups are found in this one screen, where existing entries can be viewed and edited, as well as new entries added.

3.6.1. For Existing Sites

3.6.1.1. Building PLU File from existing ECR data

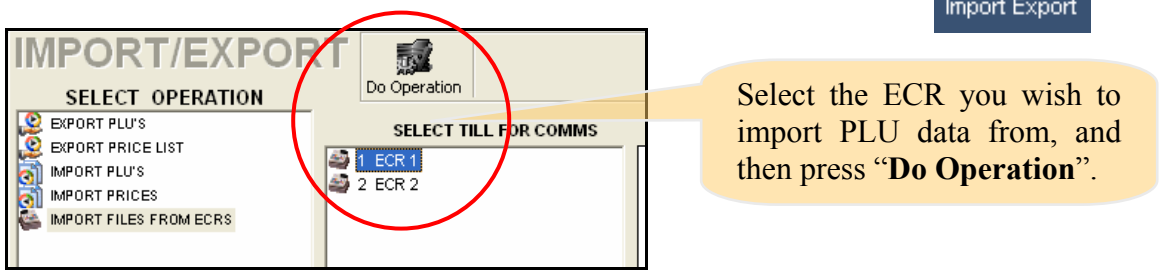
IMPORTANT: **THIS FUNCTION IMPORTS ALL DATA IN AN EXISTING ECR. USE THIS FUNCTION ONLY WHEN SETTING UP THE PLU FILE FOR THE FIRST TIME**.

IMPORTANT: due to limitations of the ER-380 ECR, importing existing ECR data is only available for Serial connections. IRC do not have the capability of uploading PLU data.

When you import PLU details from an existing ECR, the following information is built automatically by SamPOS+: a) PLU details and settings, and b) Group descriptions and settings.

TOOLS → Import/Export → Import Files From ECRs





IMPORTANT: you must already have set-up the ECR in SamPOS+ before you choose to import data from ECRs. Refer to section **3.2.2 – Adding a new ECR** for information regarding adding new ECRs to the system.

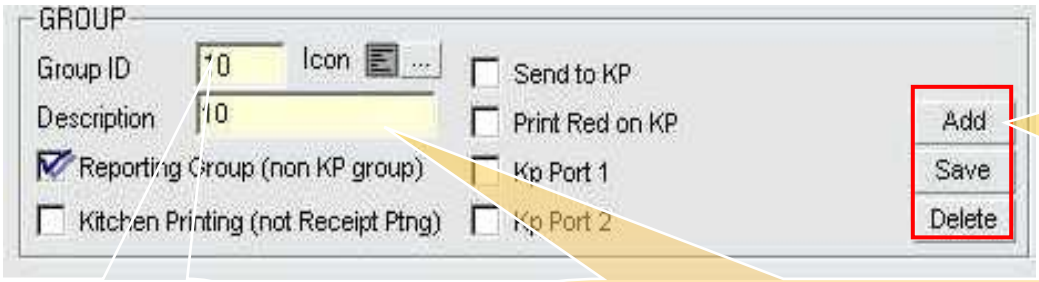
3.6.2. For New Sites (and Manual Entry)

For new sites, or when you wish to build the PLU file yourself – either manually or by importing a text file – it is first required that Groups be entered into the software.

3.6.2.1. Adding Groups

SETUP → Setup and Configure ECRs

The Groups section is found at the bottom of the PLU screen. It has its own add, save, and delete buttons. Do not use the larger add, save and delete buttons on the upper toolbar, these control the individual PLUs. Follow these steps to add a new Group to the software.



a) Press the "**Add**" button in lower right-hand corner of the Group section.

b) Enter the "Group ID", or accept the system-assigned ID

c) Enter a name for the new Group – e.g. "***BEVERIDGE GST***". The default Group name is "**GROUP x**" – where the '**x**' indicates the system-assigned ID number.

The following settings are optional, depending on the dynamics of the individual system.

a) **Reporting Group (non KP group)**: If ticked it means this Group is used for reporting. If it is un-ticked then it is a **Kitchen Printing** group.

b) **Kitchen Printing (not Receipt Ptng)**: If this box is ticked it flags the Group as a **Kitchen Printing** group

c) **Send to KP**: If ticked the items in this Group are sent to a Kitchen Printer.

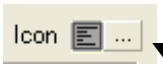
d) **Print Red on KP**: If ticked items in this Group are printed in red on the Kitchen Printer. **NOTE: this option not available on the ER-380, as this ECR uses a thermal printer. Red printing is available only with dot-matrix printers.**

e) **KPPort1**: Kitchen Printer is connected ECR comm. port 1.

f) **KPPort2**: Kitchen Printer is connected ECR comm. port 2.

g) **Age Verification**: If Not Zero then items in this Group require age to be verified before they can be sold, e.g. tobacco and alcohol products.

Press the "**Save**" button once all changes have been made to the selected Group. The new Group is then added to the tree-view list on the left-hand side of the PLU Screen.



TIP: to the right of the "Group ID" field there is a pull-down menu where the operator can select from a range of icons.

3.6.2.2. Adding PLUs

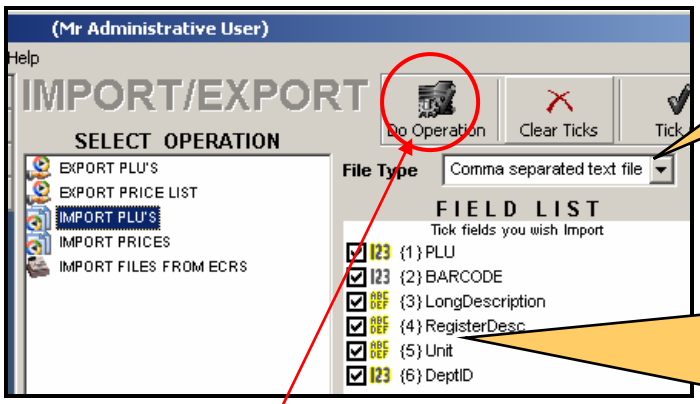
3.6.2.2.1. Building PLU file from a Text File

Instead of creating a PLU file manually, you may choose to build it from information imported from a text file.

IMPORTANT: before importing a PLU file from a text file you must first manually add the Groups to the SamPOS+ PLU file. Refer to section 3.3.2.1– Adding Groups for information regarding this process. Be careful when adding your Groups, and be sure the Group ID number for each matches the Department (Group) ID you have in the text file for each item.

NOTE: the Department (Group) ID is the only method SamPOS+ uses to assign the PLUs with their correct Group.

To import PLU details from a text file you need to go to:
TOOLS → Import/Export → Import PLUs



IMPORTANT: the text file must be formatted in the above way – either tab or comma delimited.

The text file **MUST** be formatted the following way:

i) **PLU number,**
ii) Barcode
iii) **Long Description**
iv) **Register Description**
v) **Unit**
vi) **Department (Group) ID**

Press the "**Do Operation**" button when you are ready to import the text file.

NOTE: where the field name appears with a yellow highlight, this indicates that is a compulsory field. You must input those fields. For example, when creating a PLU file

from a text file you must have the following: a) PLU; b) Barcode; c) Long Description; d) Register Description; e) Unit; and f) Dept ID.

> **IMPORTANT: you must allow an extra column for the barcode, even if it is left empty, or filled with a single zero (single zeros or zeros at the front of the barcode get stripped out)**.

TIP: the easiest way to build a PLU file from a text file is to first create an Excel spreadsheet to enter your data – remembering the strict format guidelines which must be adhered to. When you save this file make sure you save it as a TEXT FILE – i.e. "*.*txt*" (where the '*' indicates the filename (eight (8) characters maximum). The file **MUST** be a text file, **NOT** any other format.

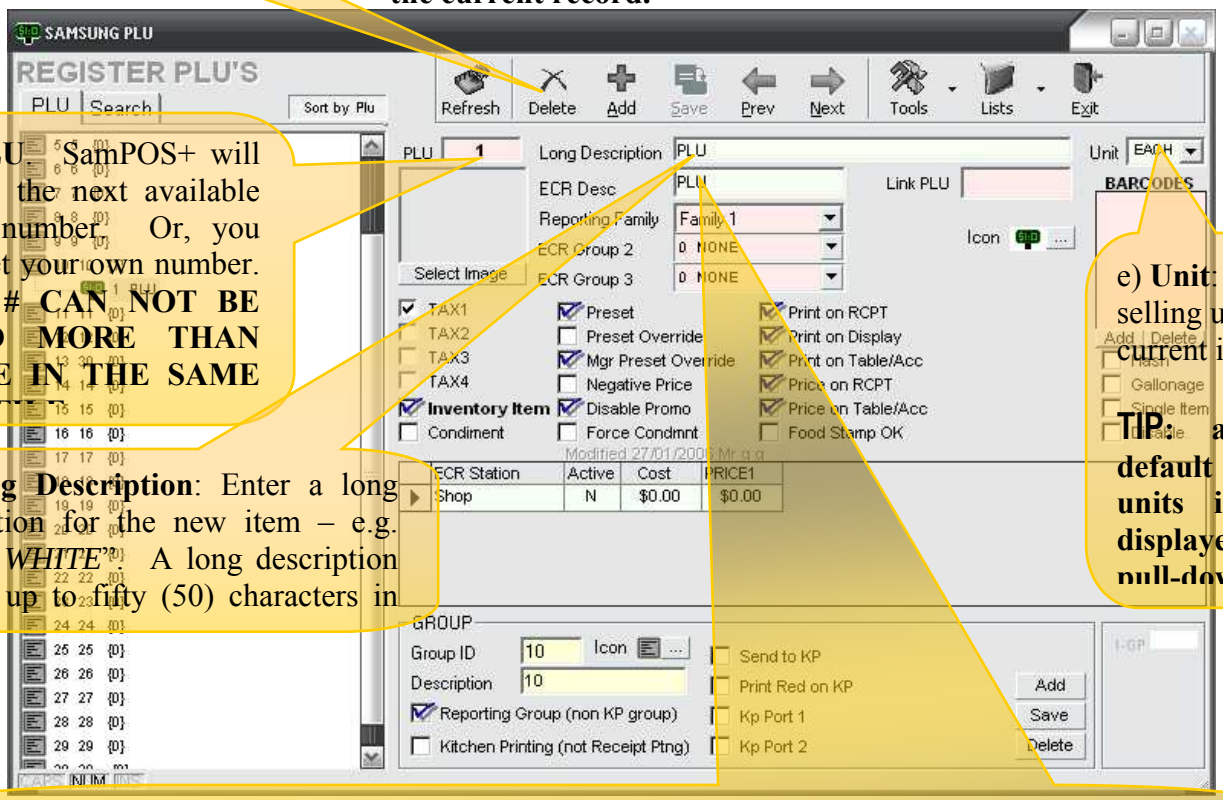
IMPORTANT: when you import the text file into SamPOS+ there MUST NOT be any column headings (e.g. PLU #, BARCODE, LONG DESCRIPTION etc) at the top of the file. You may put column headings in to aid you while creating the file, however these must be removed before you import it into SamPOS+.

3.6.2.2.2. Manual Entry

SETUP → Edit and Create PLU'sSetup

a) Press the "**Add**" button to add a new PLU.

NOTE: when adding PLUs manually you will only be able to enter selling prices after you press the "Save" button for the current record.



b) **PLU**: SamPOS+ will assign the next available PLU number. Or, you can set your own number. **PLU # CAN NOT BE USED MORE THAN ONCE IN THE SAME**

c) **Long Description**: Enter a long description for the new item – e.g. "*FLAT WHITE*". A long description can be up to fifty (50) characters in

e) **Unit**: enter the selling unit for the current item.

TIP: a list of default selling units is already displayed in the pull-down list.

d) **ECR Description**: enter the description of the product which will appear on the ECR. An ECR Description can be up to sixteen (16) characters in length.

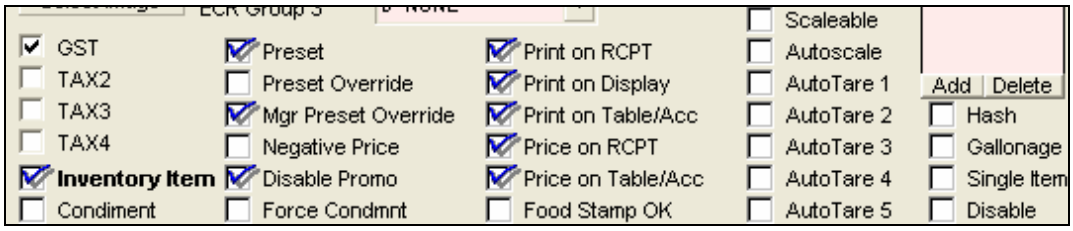
NOTE: the largest possible PLU number you can have in the database is "999999". Numbers greater than one million will not be accepted as these are treated as barcodes.

QUICK GUIDE:

1. **Select the Group; note: PLU flags only need to be set once for each Group.**
2. **Follow steps a), b), c), d), and e) in the yellow callouts above.**
3. **Press "Save" to save the new record.**
4. **Add Selling Prices.**

- **PLU Flags**

The following settings are optional, depending on the dynamics of the individual system. **NOTE: these only need to be set once for each Group**.



a) **Inventory Item**: ECR may track stock level of items.

b) **Condiment**: Item is used as a condiment entry (eg. With cheese).

c) **Preset**: Sell at Price specified in Price List.

d) **Preset Override**: Clerk may change price at ECR.

e) **Mgr Preset Override**: Manager may change price at ECR.

f) **Negative Price**: Item is sold at negative of price entered below.

g) **Disable Promo**: Item cannot be used for Promo function in ECR.

h) **Force Condiment**: Item forces the selection of a condiment entry (e.g. Steak is followed by a cooking instruction).

i) **Print on RCPT**: Item appears on Receipt.

j) **Print on Display**: Item appears on ECR Display.

k) **Print on Table/Acc**: Item appears on Table/Account statements.

l) **Price on RCPT**: Item price appears on Receipt.

m) **Price on Table/Acc**: Item price appears on Table/Account statements.

n) **Food Stamp OK**: Food Stamp may be exchanged for this item.

o) **Hash**: Item sale is not included in sales reports – e.g. special charity sales like Girl Scout Cookies where you receive media into your drawer but, do not want these sales reported with your regular items.

p) **Gallonage**: Track Gallons/Liters sold – e.g. Fuel / Gasoline.

q) **Single Item**: Only one of these items may be sold per transaction.

r) **Disable**: Disable item for sale (may be temporarily out of stock etc.).

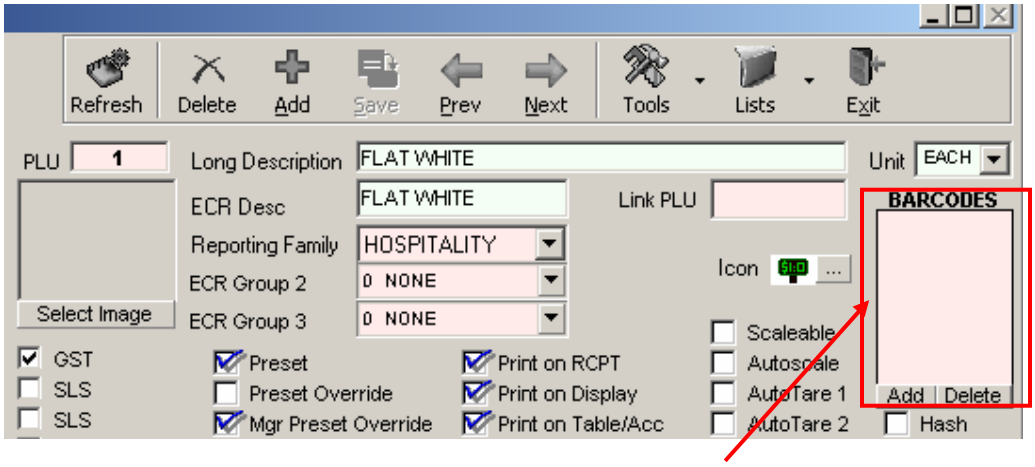
NOTE: s. to v. relate to the use of scales with the ECR. To use these settings go to:

TOOLS → Config → General Setup Tab → tick the box "*ECRs use scales for weighing products*"

s) **Scalable**: Item is sold through a scale.
t) **Auto scale**: Auto scale feature used.
u) **Auto Tare1**: Tare weight preset 1 (set in ECR) is used.
v) **Auto Tare 2 to 5**: As described above.

- **Barcodes**

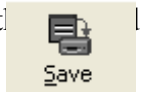
NOTE: ECRs must be set to receive and scan barcodes i.e. the "Barcode" portion of the memory allocation settings must be set. Setting a zero value will turn off barcode receive function; refer to section 3.5.3.1 – Memory Allocation for information on setting memory parameters.



If the ECR(s) are being used to scan barcodes the BARCODE list becomes active for each PLU. Each PLU is capable of having multiple barcodes assigned, if necessary.

To add a new barcode you press the "**Add**" button at the bottom of the barcode table, enter the barcode from the product label, and finally press "**Enter**" to confirm the entry.

To delete a barcode, first highlight t barcode and then select the "**Delete**" button.



NOTE: you must press the "Save" button at the top of the PLU screen to ultimately confirm the addition or deletion, i.e. confirm the change back to the database.

3.6.2.2.3. Selling Prices

- **Generate from Cost**

NOTE: before you can generate selling prices from the cost price, you must already have a cost price in the system for the relevant products.

When generating selling prices from an existing cost price, the operator must use the Global Price Change function. A global price change will affect ALL products in selected Groups, and is not easily reversed. So, before any global price change it is strongly recommended that a fresh back-up be taken.

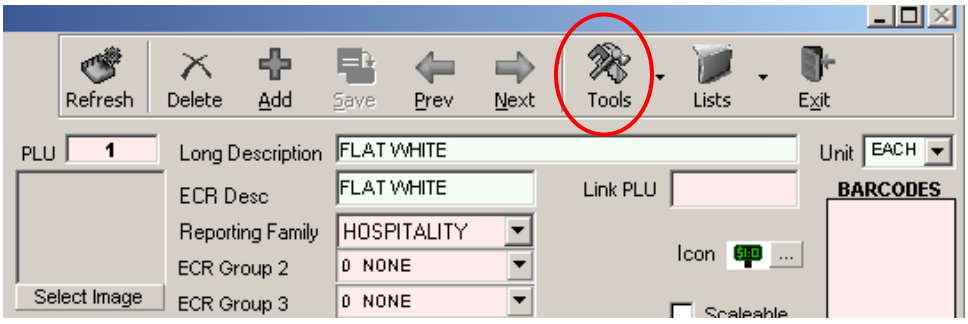
TOOLS → Backups → Do Backup



IMPORTANT: always do a fresh back-up IMMEDIATELY PRIOR to undertaking any global price changes.

SETUP → Edit and create PLU's

Access the Global Price Change function from two locations within the SamPOS+ Polling & Inventory Software. Firstly, in the top left-hand corner of the main screen there is a pull-down menu titled "**PLU**". Located on this pull-down is the option "**Global Price Change**". Left-click on this option to open the price change setup screen.



Alternatively, if you already have the Samsung PLU screen open, in the top right-hand corner of this screen there is large button labeled **Tools** with another narrow button to its right. Left-click on the narrow button to reveal the pull-menu containing the Global Price Change function.

- **Executing a Global Price Change**

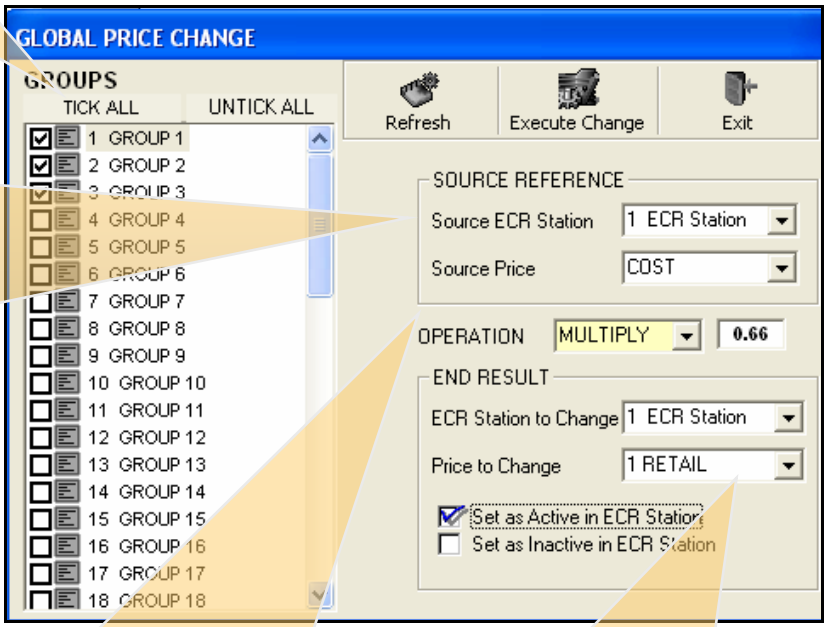
NOTE: you must already have all ECR Stations, price levels, and products set-up in SamPOS+.

IMPORTANT: when doing a global price change across two (2) ECR Stations, there must be at least one (1) ECR already set-up at the end destination.

With the Global Price Change screen open, the operator will follow these steps to generate a selling price from the existing cost price.

a) Tick the Groups you wish to apply the change to.

TIP: to apply the change to all Groups select the "TICK ALL" button.



b) Set the "**SOURCE REFERENCE**" for the price change. This is the amount used as the base for the price change.

TIP: when the cost price is used set the "Source ECR Station" and "ECR Station to Change" as the same.

c) Set the "**OPERATION**" and the **change-value** for the price change. E.g. in this example we are modifying the Cost price by 0.66. (Or, a 44% mark-down). (Operations available are: addition, subtraction, and multiplication)

d) Set the "**END RESULT**" of the price change. In our example, it will be the selling price.

NOTE: you must set items active in ECR Station; otherwise it will not be flagged to go as a change to those ECRs.

When you have completed step d) (to the right), the "**Execute Change**" button will activate (transition from greyed-out to the colour it is in the above screenshot). To execute the global price changes simply press this button.

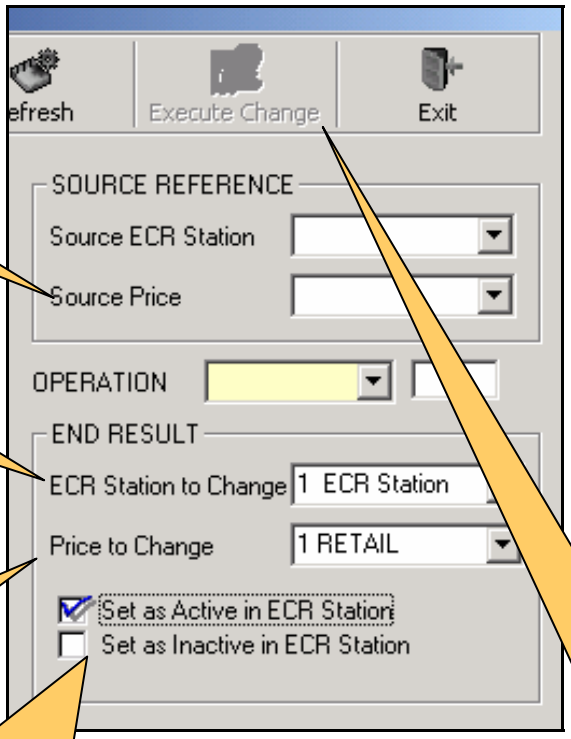
IMPORTANT: Remember this change is executed immediately, so make certain you have a fresh back-up BEFORE accessing this screen.

- **Making products active in ECR Stations**

PLU → Global Price Change

As well as using the Global Price Change to generate selling prices, you are able to set products active (or inactive) in an ECR Station using this screen. By using only the '**END RESULT**' section you are telling SamPOS+ that you want all the products in the selected group(s) to be flagged as active.

Leave both the '**SOURCE REFERENCE**' and '**OPERATION**' sections empty; they are not utilized during this process.



a) Set the name of the ECR Station you where you wish to activate the items.

b) You **MUST** set a price level. Price level number one (1) is simplest.

c) Tick the box '**Set as Active in ECR Station**'.

NOTE: if you wanted to set all products in a Group(s) inactive in a location you would tick the lower box instead.

d) When you have selected a Group(s) to apply the change to the button labeled '**Execute Change**' will activate. Press it to execute the activation

- **Importing Text File**

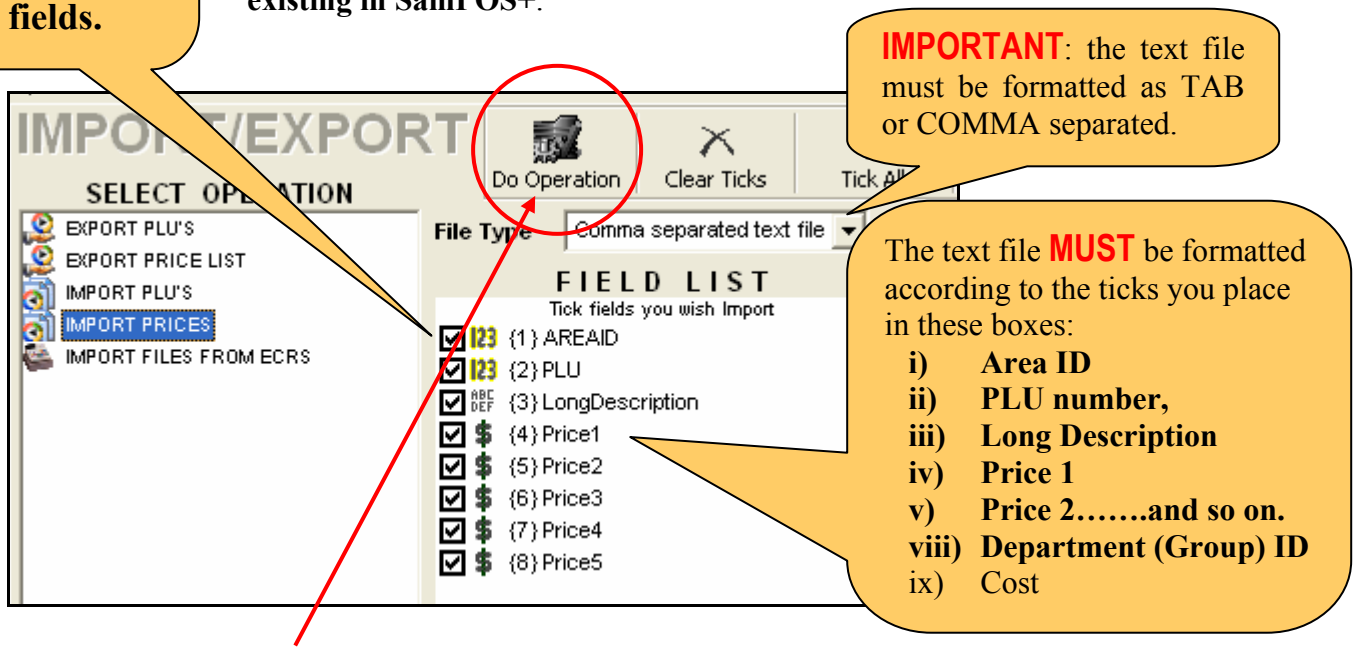
TOOLS → Import Export → Import Prices

When setting up the PLU file for the first time, you may also set selling prices by importing the information from a text file. Access this option from same location as **3.6.2.2.1– Building PLU file from a Text File**; however on this occasion select the option "**IMPORT PRICES**".

IMPORTANT: you must also adhere to the same strict format for the text file.

NOTE: you must have all ECR Stations and relevant price levels existing in SamPOS+.

The field names highlighted in yellow are compulsory fields.



IMPORTANT: the text file must be formatted as TAB or COMMA separated.

The text file **MUST** be formatted according to the ticks you place in these boxes:

- **i) Area ID**
- **ii) PLU number,**
- **iii) Long Description**
- **iv) Price 1**
- **v) Price 2…….and so on.**
- **viii) Department (Group) ID**
- ix) Cost

Press the "**Do Operation**" button when you are ready to import the text file.

TIP: the easiest way to set selling prices from a text file is to first create an Excel spreadsheet to enter your data – remembering the strict format guidelines which must be adhered to. When you save this file make sure you save it as a TEXT FILE – i.e. "*.txt" (where the '*' indicates the filename (eight (8) characters maximum). The file MUST be a text file, NOT any other format.

NOTE: if you get any "Operational Errors" during the import (the panel on the far right-hand side of the screen is where these are displayed) check the following:

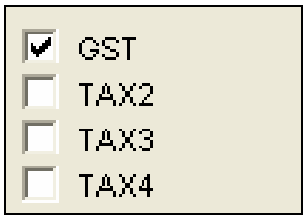
1) **The format of the text file – including the column order (the "Field List" determines the order of the columns MUST be in the text file), and**
2) **Set-up of SamPOS+ vis-à-vis ECR Station ID numbers, PLU numbers, and price levels.**

TIP: Both 1) and 2) MUST match up EXACTLY.

3.6.2.2.4. SamPOS+ Tax Rate Flags

SETUP → Edit and Create PLU's

The only tax rate setting in SamPOS+ is a tick box on the PLU details screen which lets the SamPOS+ Polling & Inventory Software know which PLUs are taxed, and which of the four tax rates are valid for the item.

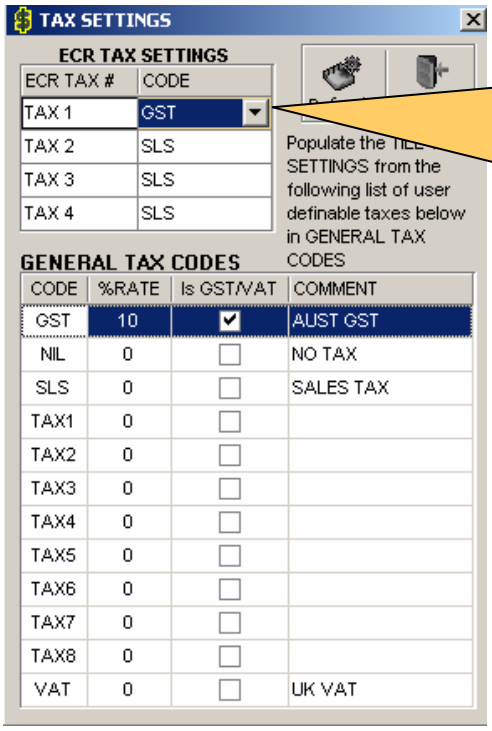


For each PLU, tick the Tax Rate which applies as per the set-up of the ECR. A non-taxed item will have no ticks in these boxes.

IMPORTANT NOTE: For customers using SamPOS+ versions 2.1 and 3.1; as well as version 3.2 with 'Disable GST / VAT tax' un-ticked.

PLU Screen → TOOLS → Tax Settings or PLU → Tax Settings

The tax rate flags need to set in SamPOS+ as well as in the ECR. If you are using "**GST**" as the GST at a rate of ten (10) percent, you must ensure in '**GENERAL TAX CODES**' table that you have a code labeled "**GST**"; set to a '**%RATE**' of "**10**"; and it is ticked as '**is GST/VAT**'.



When the GST tax code is set in the lower table, you must than assign this code to one (1) of the four available '**ECR TAX RATES**'. These tax rates correspond to the four (4) Tax Rate tick boxes located on the PLU screen **AND** to the four available tax rates in the ECR(s).

3.6.3. Reporting Families

Reporting families are used as a compliment to Groups. Unlike Groups they do not get sent to the ECR(s). They add an extra flexibility to the SamPOS+ Polling & Inventory Software, as the operator can group PLUs which may reside in different ECR Groups under one common classification.

One of the many uses for Reporting Families comes in the convenience store scenario. Items such as chocolate bars, packets of chips, and savory salsa dips may each have their own ECR Group while all being located in aisle five.

Therefore, the operator can set-up Reporting Families for each aisle in the convenience store. Placing chocolate bars, chips, and dips in their own reporting family called "*Aisle 5*", now allows the operator to filter an Inventory Count by Family.

Alternatively, the operator may choose to track brand loyalty, or utilize 'concept grouping' (i.e. '**Fresh**' versus '**Frozen**' products). Used in this way reporting families become a companion to the business's marketing strategy. Sales history can be quickly accessed, and marketing strategies modified to suit the prevailing consumption climate.

3.6.3.1. Adding Families

Reporting Families are held in a separate table which can be accessed from multiple locations. Firstly, in the top left-hand corner of the SamPOS+ main screen there is a heading called "**PLU**". If you left-click on this heading a pull-down menu is displayed. Select the option called "**Setting up Reporting Families**".

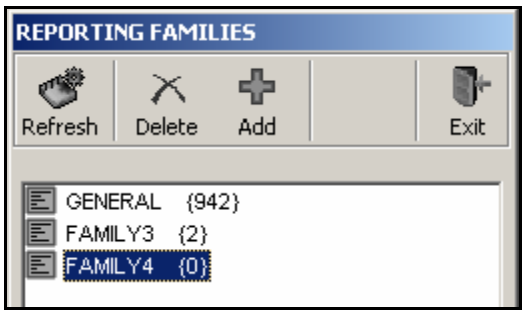
PLU → Setup Reporting Families

Secondly, in the top right-hand corner of the Samsung PLU screen there is a large button labelled "**Tools**". Next to this button there is a narrow button which reveals another pull-down menu. Select the option titled "**Reporting Families**" to once again open the reporting families table.

PLU Screen → TOOLS → Reporting Families

Finally, by simply double-clicking on the "**Reporting Family**" field in the PLU screen it will once again open the reporting families table.

PLU Screen → Double click on Reporting Family Field (Pink)



To add a new Reporting Family the operator will left-click on the button labelled "**Add**". At the end of the list of existing reporting families there is now a new family with the name "**FAMILY*x***" (where '***x***' is the next available number). The operator can either accept this default name, or change it to one which has more meaning to their business.

To delete a Reporting Family the operator highlights the desired family, and then left-clicks on the button labelled "**Delete**".

IMPORTANT: if a Reporting Family contains PLUs it CANNOT be deleted. You MUST re-assign the PLUs before deleting the Family.

3.6.3.2. Assigning Families

There are multiple locations where the Reporting Families can be assigned to PLUs. The first and simplest of these is the Samsung PLU screen. The operator simply selects the Reporting Family from the pull-down menu, 'tabs' off the field (presses the '*Tab*' key on the keyboard), and presses "**Save**" to confirm the change.

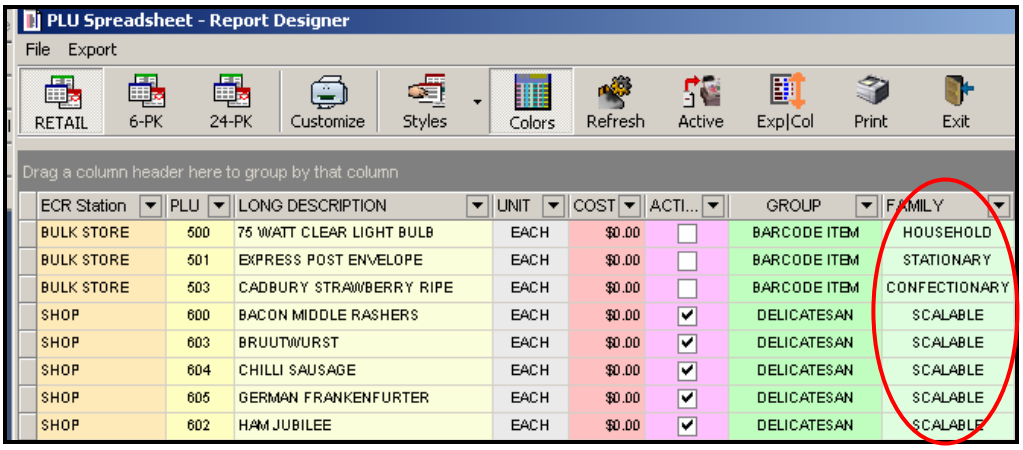
PLU Screen → Select Pull-Down Menu on Reporting Family field → select Family → Save

This is fine if you are editing a couple of records, but if a large number of alterations are required this method may be considered too time consuming. If this is the case, the second method is faster as it involves utilising the "**PLU Spreadsheet**".

SPREADSHEETS → PLU Spreadsheet

To access the "**PLU Spreadsheet**" go to the Samsung PLU screen where there is a button labelled "**Lists**". Next to this large button is a narrow button revealing a pull-down menu; select the option "**PLU Spreadsheet**".

PLU Screen → LISTS → PLU Spreadsheets



Change the new Reporting Family by selecting the new family from the pull-down menu or typing the first letter of the family name, and then press "**Enter**" or **"Arrow Key"** to move to the next record. When finished simply close this form, and the change is written back to the database.

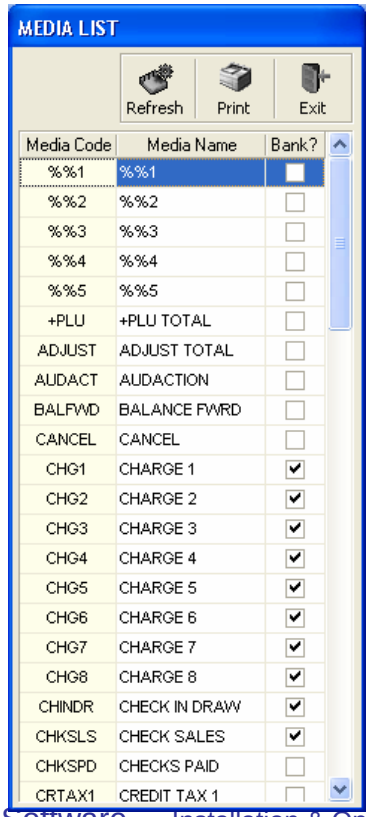
PLU Spreadsheets → Select Family for each PLU

3.7. Configure Media Lists



After you have completed the setup of the PLU file (section 3.3. PLU File), you can configure the media list. You access this option by '**Configure Media Lists**' which is found on the "**SETUP**" menu.

SETUP → Configure Media Lists



3.8. Backing up the data

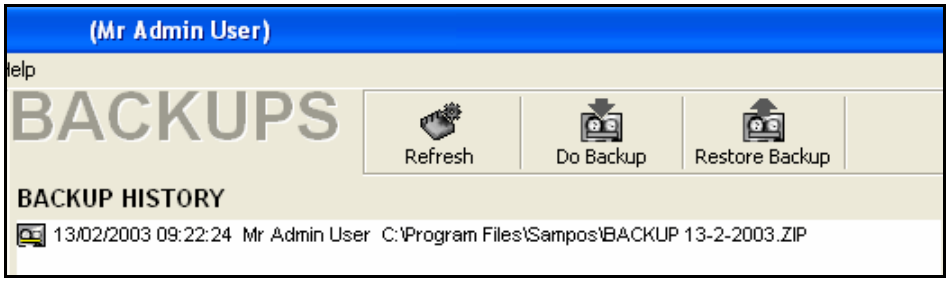
Backing up the SAMPOS+ data file should be done at least once (1) a day. Ideally, it should be taken at the end of the day, after all the work for that day has been completed. The back-up function is found by going to the TOOLS menu.

TOOLS → Backups

3.8.1. Backup History

The back-up screen is divided into three sections. The first section displays the completed back-up history for the current data-file. Each entry reports the following:

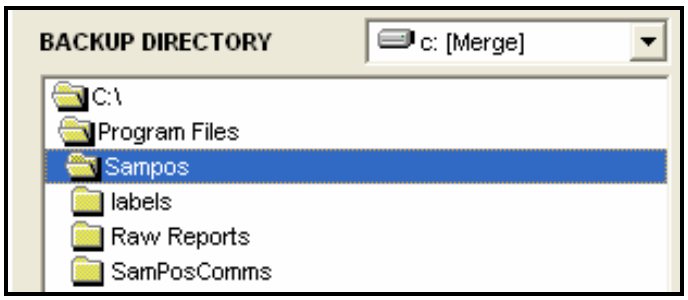
1. The ***date*** and ***time*** the back-up was done;
2. The ***operator*** who did the back-up, and
3. The ***full file-path name*** for the backed up file.



NOTE: as the back-up ages – i.e. the date it was done gets longer and longer ago – you will see the icon to the left of the log entry get darker and darker. The freshest back-up will display a nice, clear, crisp icon.

3.8.2. Back-up Directory

The second section of the back-up screen is where the operator will set the location of "**Backup Directory**" – the place where the back-up file gets stored. Ideally, you should back-up to a removable media, like a Zip disk.



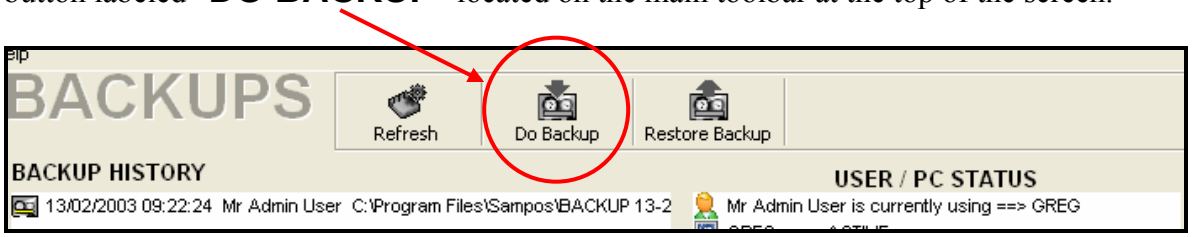
NOTE: it is NOT RECCOMENDED that back-up files are kept on the Hard Drive of a computer. They should be kept on a removable media, and kept in a safe place.

The final section of the back-up screen is the "***User / PC Status***" panel. This is simply a replica of the panel located on the Main Menu of SAMPOS+. Its role is to let the user know which operators, and which copies of SAMPOS+ are currently open in a multi-user environment.

Before doing a back-up, the operator **MUST** ensure that all other users have logged out of SAMPOS+ on other computers.

3.8.3. Doing a Backup

After selecting the relevant "**Backup Directory**", and ensuring no other operators are logged into SAMPOS+ on other computers, a backup will be done by pressing the button labeled "**DO BACKUP**" located on the main toolbar at the top of the screen.

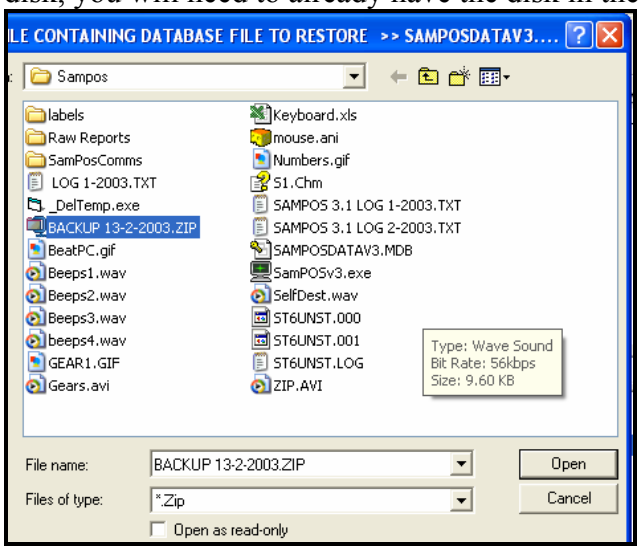


Depending on the size of your data-file – which only increases in size over time – the process can take a little as a few seconds, or as long as a couple of minutes.

3.8.4. Restoring from a Backup

If the need arises where you need to restore your system from the most recent backup, then you will need to use the button located directly to the right of the "Do Backup" button. This button is labeled "**RESTORE BACKUP**".

When you are restoring from a previous backup, SAMPOS+ will ask you to specify the location where the backup file is located. If this is a removable media, like a Zip disk, you will need to already have the disk in the drive.



Once you have located and selected the correct backup; pressing the "**OPEN**" button will unzip the backed up file into the SAMPOS+ data file directory.

When the process of restoring the backup in completed, the program must be restarted.

IMPORTANT: it will over-write the existing file in that location.

3.9. Employee Management

There are three types of employees which can be set-up in the SAMPOS+ software; one is employees who have back-office access; second are till clerks who have no back-office privileges; and finally there are employees who have both back-office and till access.

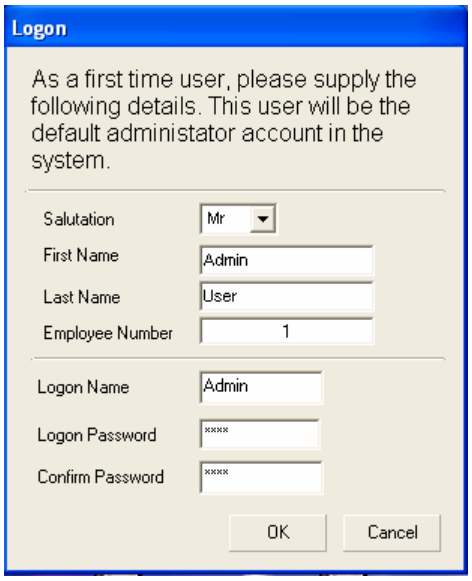
Employees who have back-office privileges are able to logon to SAMPOS+, and as such can access all or only some of the sections of the application depending on the responsibilities they hold within the organisation.

The employee section is accessed from the main screen of SAMPOS+ by going to the **SETUP** menu.

SETUP → Edit and Create Employees

3.9.1. Administrative User

You will recall when SAMPOS+ was first installed, you were asked to enter the details for the first user in the screen below. The user set-up at this point is referred to as the "**Administrator Account**", and as such has full access to all areas of the application.

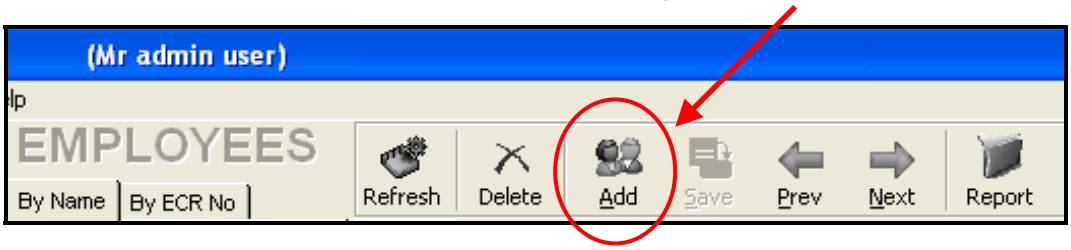


NOTE: The "Administrative Account" is the only operator who is allowed to change another employee's security access settings.

3.9.2. Adding a new employee

To add a new employee to SAMPOS+, simply left-click on the button labelled "**ADD**" which is located on the upper toolbar.

SETUP → Edit and Create Employees → Add



3.9.2.1. General Details

NOTE: any fields in the EMPLOYEES screen which are highlighted in green are mandatory entry fields.

a) **Name**: for obvious reasons SAMPOS+ cannot have an employee entry with no name.

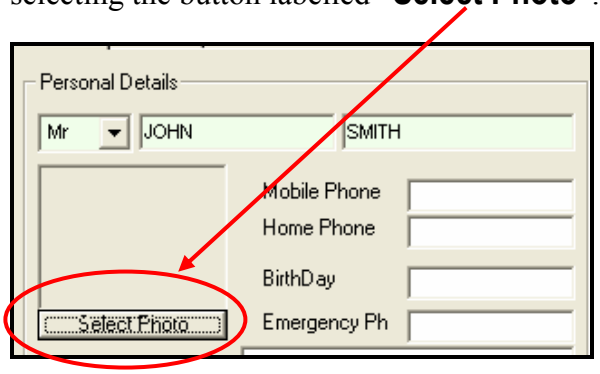
b) **Employee Number**: SAMPOS+ will automatically assign the next available employee number when the operator simply left-clicks into this field; alternatively the operator can maintain their own employee number system.

NOTE: a combination of alpha-numeric characters can be used for the Employee Number.

c) **Date Hired**: this date will default to the "*today's*" date (i.e. the date set in the computer) and can be changed accordingly.

3.9.2.2. Adding a picture

If a scanned picture is available this can be added to the employee record by selecting the button labelled "**Select Photo**".



IMPORTANT: photos must be scanned as Bitmap or JPEG images (i.e. have the BMP/JPG extension). No other picture format is able to load into SAMPOS.

3.9.2.3. Back office access

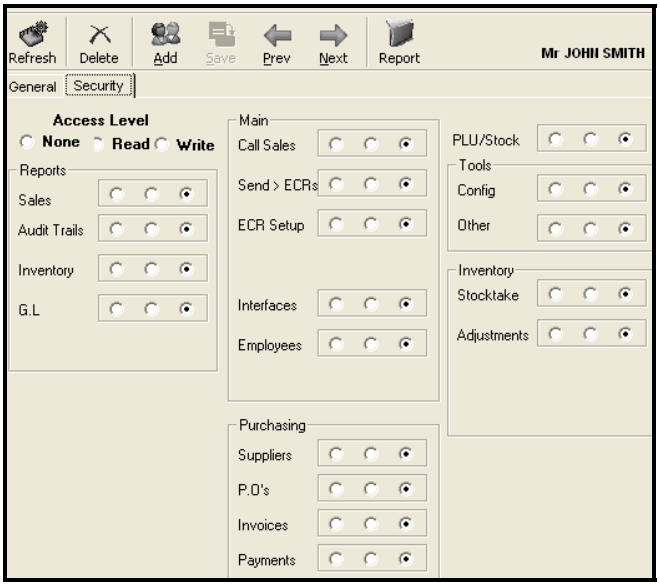
If the new employee is going to have access to SAMPOS+, then the user must tick the box labelled "**Has 'PC' Access**". This can be found in the top right-hand corner to "**Employee Management**" window.



Once the employee has been flagged as having back-office access, they must be assigned a logon name, and a password.

NOTE: there is no requirement to set a password for an employee; however it is recommended for security's sake that one be assigned.

3.9.2.3.1. Security restrictions



LEGEND

NONE: the employee is not able to access this option.

READ: the employee has '*read-only*' access to this option.

WRITE: the employee has full access to this option.

When an employee has back-office access they may not be required to access all areas of SAMPOS+. The "**Security**" tab, to the right of the "**General**" tab, is where that employee's level of access can be set and control.

The '*Administrative User*' is the only person who is allowed to set and change the security settings for employees.

3.9.2.4. Till Clerk

If the employee is going to operate the ECR, they can be flagged as an 'ECR Clerk' and assigned an '**ECR Clerk number**'. SAMPOS+ will automatically assign the next available ECR Clerk number. The operator may either accept this number, or assign their own number.



IMPORTANT: till clerks must also be set up in the ECR, and the clerk numbers must match in both places. The 'till clerk number' is the only setting which links the sales a clerk does at the till, and their record in SAMPOS+.

If clerk tracking is being utilised on the ECR, i.e. if a clerk must logon before commencing a transaction, the '**ECR Clerk number**'. The clerk numbers in SAMPOS+ will track a clerk's sales performance by media, when matched with the clerk numbers returned from the ECR.

NOTE: ECR clerk numbers will only track clerk sales by media, not by PLU.

4. Working With SamPOS+

4.1. Importing Sales

There are two methods of imported sales from the ECR into the SAMPOS+ application; one is manually initiating retrieval, and two is setting SAMPOS+ to automatically retrieve the sales at the same time each day. Both forms of sales retrieval are accessed from the main menu of SAMPOS+, by selecting the "**Call sales from ECRs**" option.

TODAY → Call sales from ECRs

4.1.1. Manually retrieving sales

To manually retrieve sales from the registers, first select the date where you want the sales to be assigned. This applies to all of the sales to be imported in the current operation.

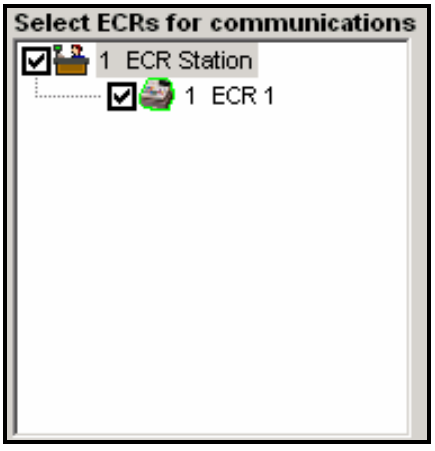


NOTE: transaction dates are not kept separate in the ER-380. Sales are batched together, and assigned one date when they are retrieved.

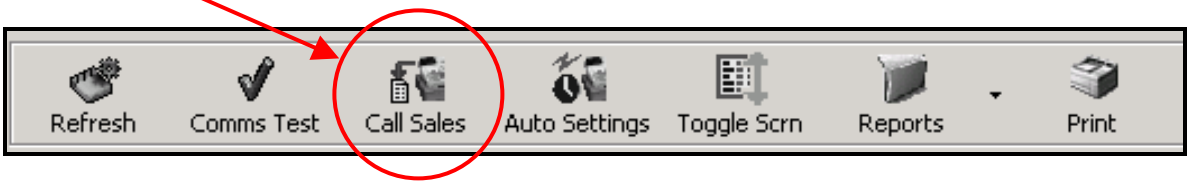
Therefore, if sales are not retrieved for two days, then on the third day there will be three days worth of sales assigned to one date.

Next, select the ECR(s) by ticking the check-boxes of the ones from which you wish to retrieve sales. In this example there is only one ECR, and one ECR STATION; however if you had multiple ECRs and multiple ECR STATIONS you would be able to select individual registers and ECRs.

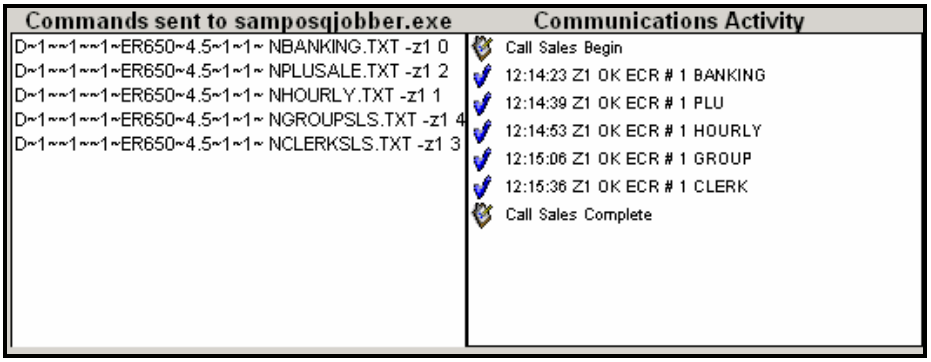
NOTE: if you have multiple ECRs in an ECR STATION, and you wish to retrieve sales from all those registers; you can select them all by ticking the check box for the ECR STATION.



Once you have selected the ECRs, and assigned to the current batch of retrieved sales, you are ready to poll the cash register. To initiate this procedure, go to the main toolbar on the Call Sales screen, and left-click on the button labelled "**Call Sales**".

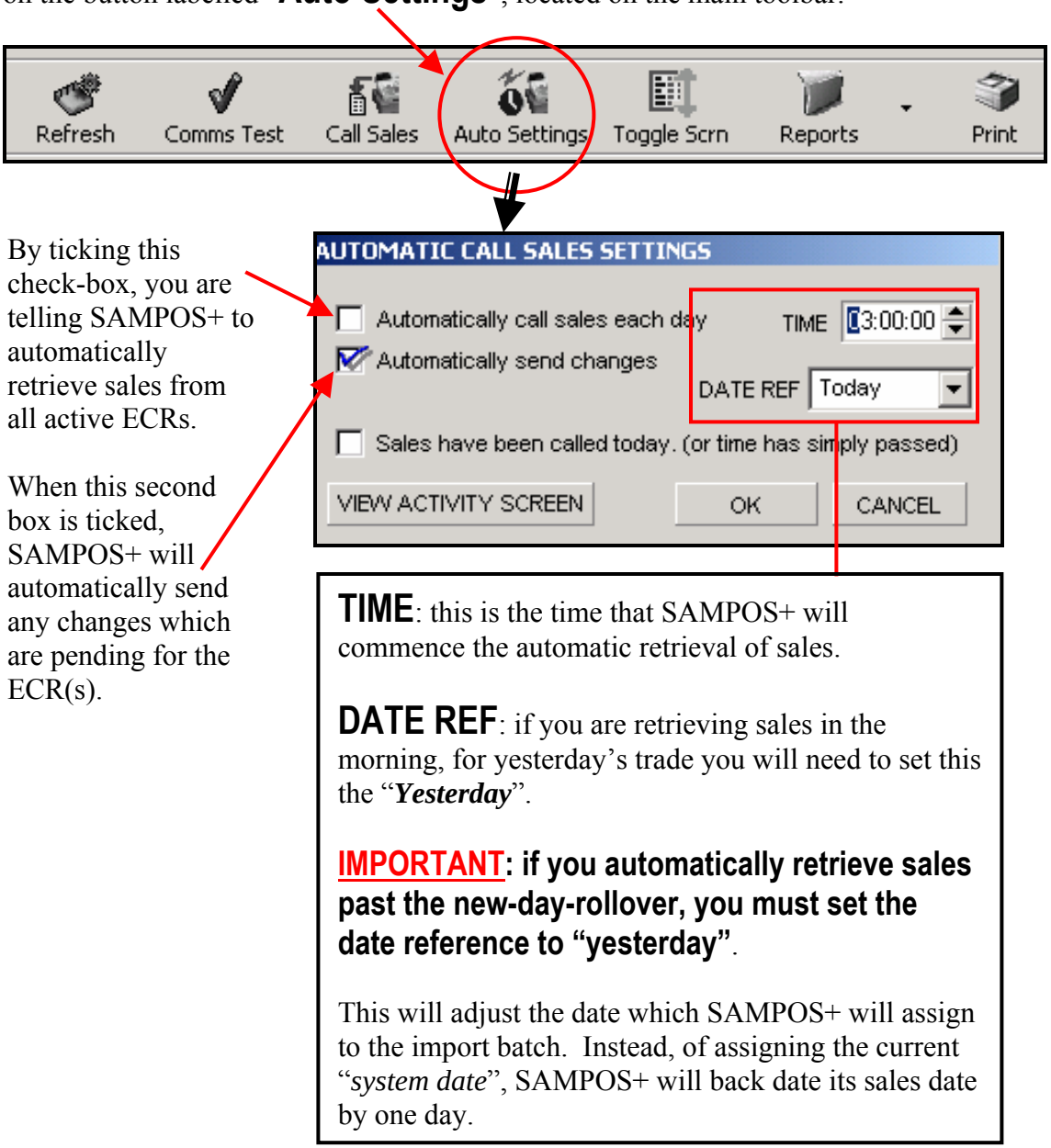


From now, the retrieval process is automated. SAMPOS+ will call the communication software, and proceed to retrieve the sales out of the ER-380. You see the commands, as well as a Pass / Fail on the five (5) retrieval steps (Banking, PLU, Group, Hourly and Clerk) displayed in the two remaining sections of the screen.



4.1.2. **Automatic retrieve of sales**

To automate the retrieval of sales at the same time every day, the user will left-click on the button labelled "**Auto Settings**", located on the main toolbar.



By ticking this check-box, you are telling SAMPOS+ to automatically retrieve sales from all active ECRs.

When this second box is ticked, SAMPOS+ will automatically send any changes which are pending for the ECR(s).

TIME: this is the time that SAMPOS+ will commence the automatic retrieval of sales.

DATE REF: if you are retrieving sales in the morning, for yesterday's trade you will need to set this the "***Yesterday***".

IMPORTANT: if you automatically retrieve sales past the new-day-rollover, you must set the date reference to "yesterday".

This will adjust the date which SAMPOS+ will assign to the import batch. Instead, of assigning the current "*system date*", SAMPOS+ will back date its sales date by one day.

IMPORTANT: for automatic retrieval of sales to function you MUST leave SAMPOS+ open, and at the main screen.

4.2. Inventory

NOTE: THIS IS NOT FOR LITE VERSION'S

SamPOS+ version 3.x offers basic inventory for the purposes of tracking whole units only. The inventory does not recipe selling items to stock items, so therefore cannot be used for tracking portions of whole units e.g. one (1) glass of Jack Daniels contains 30mL from a 700mL bottle.

Inventory in version 3.x has the potential to include multi stock locations – refer to section **3.4 Registration** to enable the multi-location option. Each location can have its own reorder information and receive new stock. Each location is connected directly to its own ECR Station from where sales deplete the quantity in stock.

NOTE: Inventory in SAMPOS+ uses UNIT QUANTITY not package quantity, therefore one package must be expressed in terms of individual units.

To access the Inventory sections of SamPOS+, go to the **INVENTORY** button on the main screen.

4.2.1. Reorder Levels

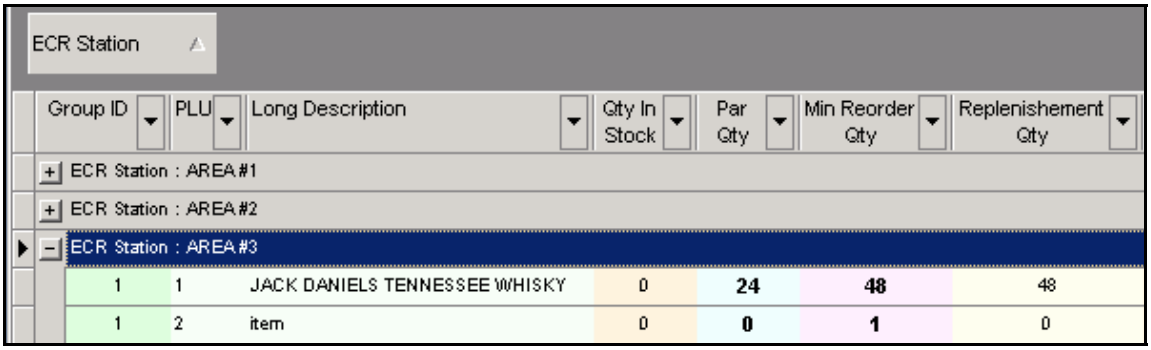
To access the reorder levels, go to:



INVENTORY → SET INVENTORY REORDER LEVELS.

TIP: the grid in the Reorder Levels screen can be sorted and filtered as desired by simply dragging a column heading into the grey space at the top of the table. You can view different column headings by clicking on the buttons across the top of the screen.

The information which can be set by the user is displayed in **BOLD** type. There are two columns where the user can set information for that PLU; one, **PAR LEVEL** and two, **MINIMUM REORDER QTY**.



PAR LEVEL refers to the minimum quantity-on-hand of that PLU in the selected location, e.g. Customer may want to maintain a minimum of 24 bottles of *JACK DANIELS WHISKY* in stock in "**AREA#3**", therefore twenty-four (24) would be set

as the PAR Level. The PLU is included in a reorder report when the stock-on-hand falls below twenty-four (24)

MINIMUM REORDER QTY refers to the smallest quantity the customer can order. In the example on page 37, the customer must order a minimum of forty-eight (48) bottles of *JACK DANIELS TENNESSEE WHISKY*.

IMPORTANT: the minimum reorder quantity is used to calculate the REPLENISHMENT QTY. Therefore, if the QTY IN STOCK is only two (2) below PAR, but the MIN REORDER QTY is twenty-four (24) the Replenishment Qty will still be twenty-four (24).

4.2.2. Stock Adjustments

To access stock adjustments, go to:



INVENTORY → INVENTORY ADJUSTMENTS (Purchases / Waste)

Both purchases of stock, and manual adjustments for factors such as wastage are expressed in SamPOS+ as "Adjustments". Purchases can be referred to as "positive adjustments" – as they deal with a positive quantity of stock; while wastage can be referred to as a "negative adjustment".

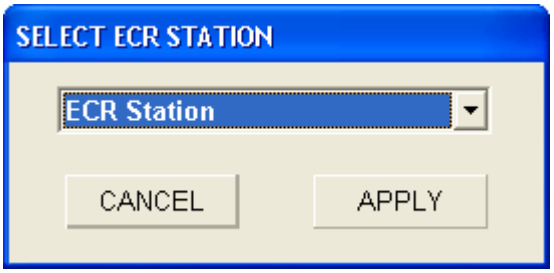
NOTE: only ONE (1) adjustment may be open at a time, AND you must either finalise the active adjustment (by POSTING it) or discard the entire adjustment.

To start a new adjustment



1. Click the **NEW ADJUSTMENT** button in the top left-hand corner of the screen. If it is disabled – greyed out – then this means there is already an adjustment open – either finish the current active adjustment, or delete it.

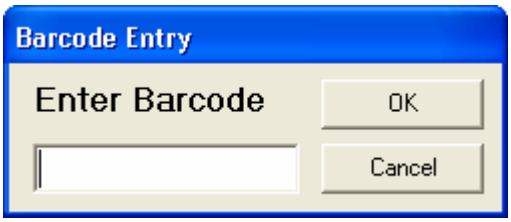
2. From the pull-down menu on the pop-up box select one of the available ECR Stations and click **APPLY**. When posted the current adjustment will apply changes to the inventory information for the selected ECR Station.



NOTE: to cancel the new adjustment at this point click CANCEL.



3. To add an item to the adjustment, click the **ADD LINE** button on the top toolbar. A new, blank line is created in the adjustment when this is done.



NOTE: if the item has a barcode, you can use a keyboard wedge scanner (i.e. a barcode scanner set up to be attached to the computer) to scan in the barcode instead of locating the product in the drop down. To use this feature click the button labelled SCAN on the toolbar. A dialogue box is displayed. Scan the barcode and it will appear here. Press OK to confirm the entry, and the product is added to the adjustment.

4. Alternatively, if you do not have a keyboard wedge scanner you can select the desired PLU – by ***Long Description*** or ***PLU number*** – from the pull-down menu.

5. Press the **TAB** key twice to move across to the **QTY** field. Press **ENTER** to place the flashing cursor in this space.

   IMPORTANT: if the current stock-on-hand quantity is in negative then the adjusted quantity MUST either bring the value back to zero, or to a positive value. The end result of the adjustment, for any product, cannot be a greater or lesser negative value.

6. Enter the stock quantity for the adjustment. If you are purchasing sixty (60) units then enter sixty (60) as a positive number. However, if you are doing a wastage adjustment you would enter a negative quantity.

7. Press **TAB** when you are finished to move to the Total Cost field. Pressing **ENTER** at this point will place the flashing cursor in this space.

8. The current ***Unit Cost*** will be used to calculate the ***Total Cost***. If you are entering a stock purchase this amount may be different for current invoice. If so, enter the new ***Total Cost*** – it should be written on the current supplier invoice – into this space.

COST CHANGES for the selected PLU in the adjustment are displayed at the bottom of the stock adjustment screen, along with the Cost Variance. Changes are also recorded on the stock adjustment report print-outs available by going to:

REPORTS → INVENTORY → ADJUSTMENTS (wastage & Purchases)

4.2.3. Inventory Count

To access an Inventory Count go to:



INVENTORY → INVENTORY COUNTS

NOTE: only ONE (1) inventory count may be open at a time, AND you must either finalise the active count (by POSTING it) or discard the entire count.

Procedures for an Inventory Count

1. **Call sales from the ECR(s)**. Giving you up-to-date expected stock-on-hand quantities.

Do not call sales again until you finished processing the count.

2. **Count the stock**.
3. **Enter the count**.
4. **Post the inventory count**.
5. **Call sales**.

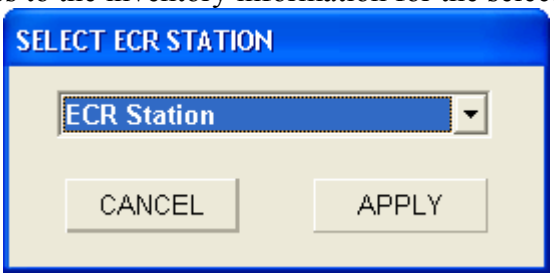
To start a new Inventory Count:



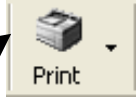
1. Click the **NEW COUNT** button in the top left-hand corner of the screen. If it is disabled – greyed out – then this means there is already an adjustment open – either finish the current active inventory count, or delete it.

   TIP: the grid in the Inventory Count screen can be sorted and filtered as desired by simply dragging a column heading into the grey space at the top of the table. You can view different column headings by clicking on the buttons across the top of the screen.

2. From the pull-down menu on the pop-up box select one of the available ECR Stations and click **APPLY**. When posted the current inventory count will apply changes to the inventory information for the selected ECR Station.

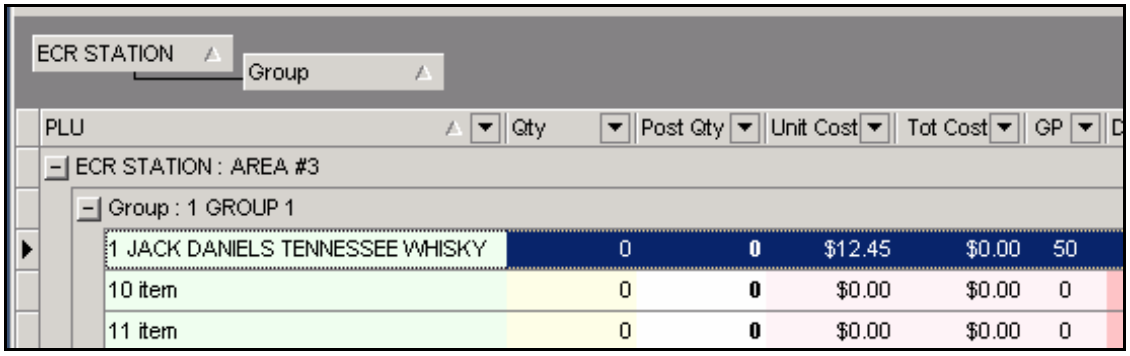


NOTE: to cancel the new adjustment at this point click CANCEL.

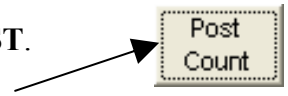


3. **COUNT SHEETS** may be printed by going to the **PRINT** button. These print each PLU **without** the system count (the number that SamPOS+ assumes you should have on-hand). These sheets go to the troops who will fill it in as they walk around the store.

4. The information which can be set by the user is displayed in **BOLD** type. There is one column which the user can edit. This is the ***POST QTY*** column, where the actual number they have counted will be entered.



NOTE: Cost calculations all use the current **UNIT COST**.



5. When you have finished processing the Inventory Count, the button called **POST COUNT** will take the post quantity and make it new stock-on-hand.

Reports based on individual Inventory Counts may be printed at any time by going to:

REPORTS → **INVENTORY** → open **INVENTORY COUNT RELATED** branch

4.2.4. Inventory Transfers

An inventory transfer will move stock from one location to another location. Transfers are simply movements of stock, so the transfer entry screen contains only PLU and Quantity columns. To access the Stock Transfers screen go to:

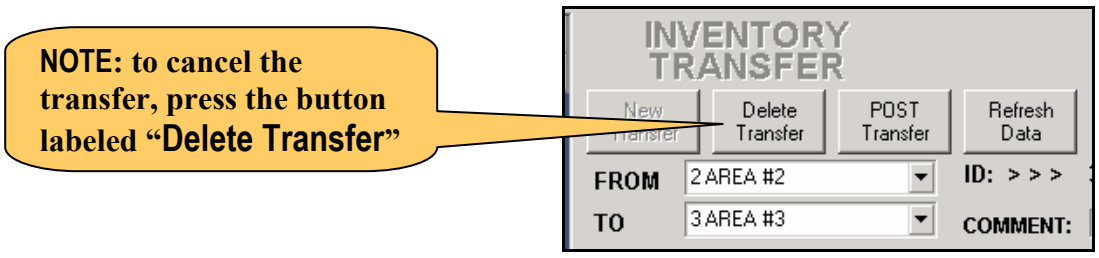
INVENTORY → Inventory Transfers

NOTE: only ONE (1) inventory transfer may be open at a time, AND you must either finalise the active transfer (by POSTING it) or discard the entire transfer.

To start a new Inventory Transfer

1. Click the **NEW TRANSFER** button in the top left-hand corner of the screen. If it is disabled – greyed out – then this means there is already an adjustment open – either finish the current active inventory transfer, or delete it.

2. Select the **FROM** and **TO** locations for the current transfer.



3. To add an item to the transfer, click the **ADD LINE** button on the top toolbar. A new, blank line is created in the transfer screen when this is done.

4. Select the desired PLU – by ***Long Description*** or ***PLU number*** – from the pull-down menu.

5. Press the **TAB** key twice to move across to the **QTY** field. Press **ENTER** to place the flashing cursor in this space.

NOTE: the COMMENT column is provided as an option so the operate can type a comment about the specific product being transferred.

To complete an inventory transfer

When the inventory transfer is completed, to post the entry the user will press the button labelled **POST TRANSFER** which can be found at the top of the screen, underneath the main toolbar.

Reports based on individual Inventory Transfers may be printed at any time by going to:

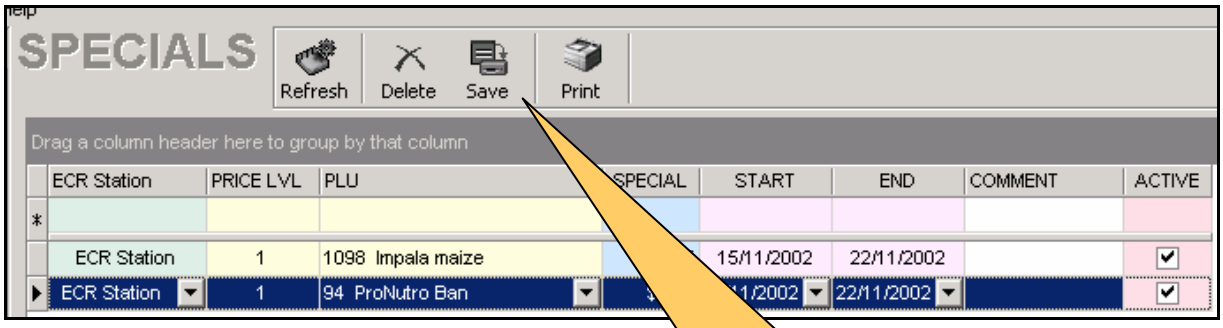
REPORTS → INVENTORY → open **TRANSFERS** branch

4.3. Setting Product Specials

Product Specials are set for a period of time to adjust the selling price of the item at the ECR. The period of time is variable depending on the business situation, and once a special has been set in SamPOS+ it can used again simply by adjusting the start and finish dates.

To access product specials go to:

TODAY → Start/End Sales Specials (which will display this screen below).



To enter new specials:

NOTE: the entry of new specials uses the top line of the grid. When the special is saved this line is cleared, and the entry is displayed in the space underneath the top line.

You **MUST** press the **SAVE** button after each new special entry to save that record.

IMPORTANT: when the product special is flagged to commence the new price will not actually appear on the ECR until you at least Send Updates, refer to section 3.5.3 – Sending Data to ECRs.

1. Select the **ECR Station** where you want to apply the product special. The pull-down menu displays the available ECR Stations.

2. Press the **TAB** key to advance one space right to the **PRICE LVL** column, and press the **ENTER** key to place the flashing cursor in the box. Type in the number of price level you wish to adjust.

3. Press **TAB** again to move to the **PLU** column. There is a pull-down menu here where you will select the product you wish to be adjusted.

4. Press **TAB** again to move right, and then the **ENTER** key to place the cursor in the box labelled **SPECIAL**. This is where you type in the Special price – the new price you will charge temporarily for this item.

5. The next two spaces are pull-down menus where the start and finish date for the special price will be entered. The special will activate when the computer's date rolls on the **START** date, and revert to normal when the date rolls to the **END** date.

6. The **ACTIVE** box will confirm that the special is to be activated on the start date.

4.3.1. Product Special Reporting

Reports based on analysis of product specials can be found by going to:

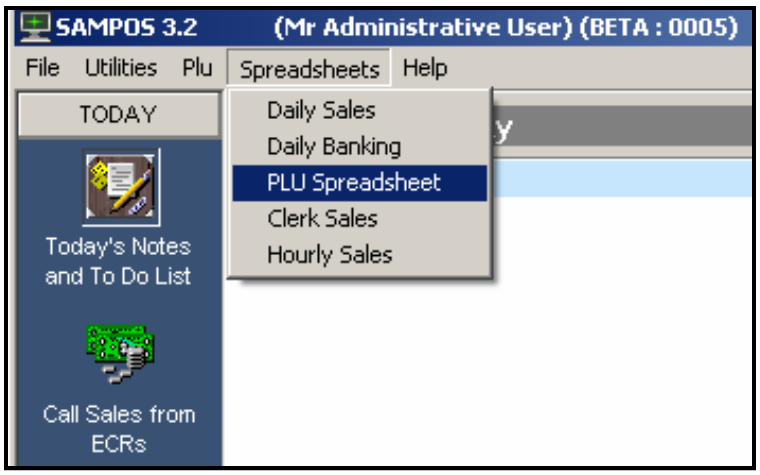
REPORTS → PLU Sales → Date Range PLU Sales → Specials Sales Performance

IMPORTANT: if you DELETE a product special from the Product Specials screen, and there sales against it at the special price you will lose it – permanently – from the Special Performance Report.

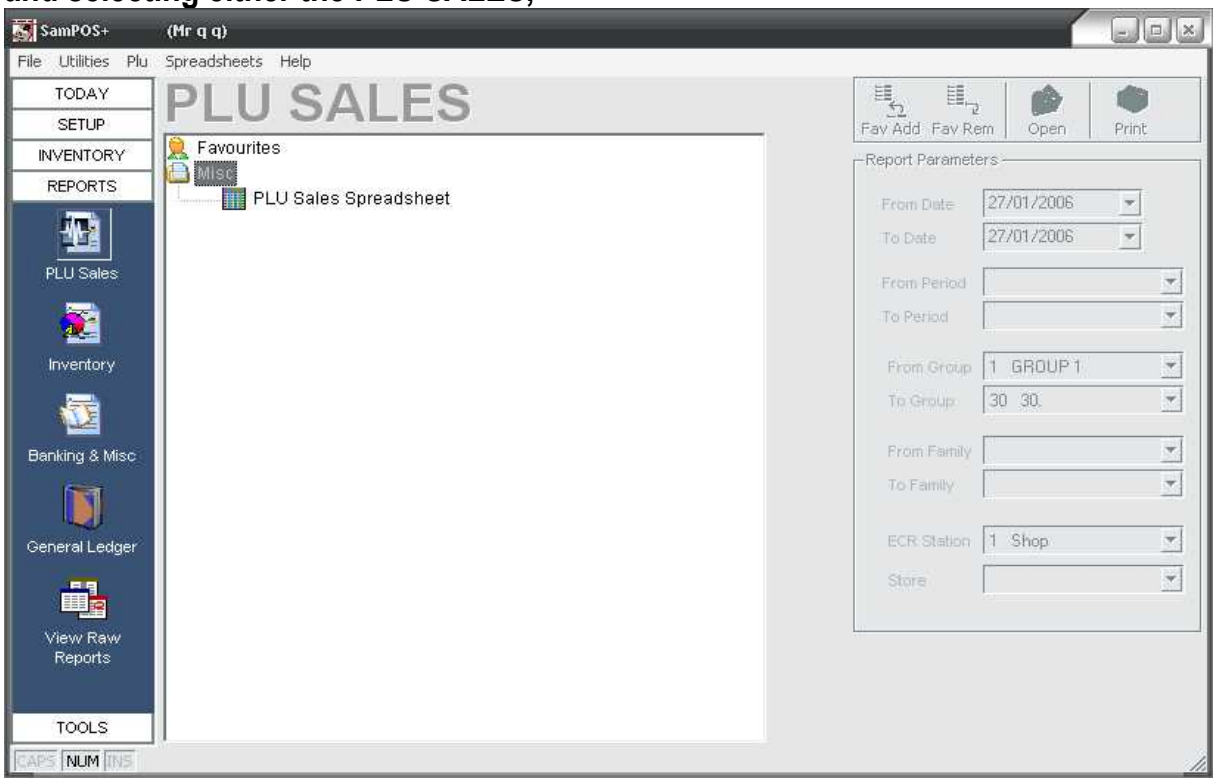
NOTE: for items to appear in the Specials Sales Performance report there must be sales of the product before AND during the special period. Sales after the special period are not included in this report.

4.4. Spreadsheets Reports

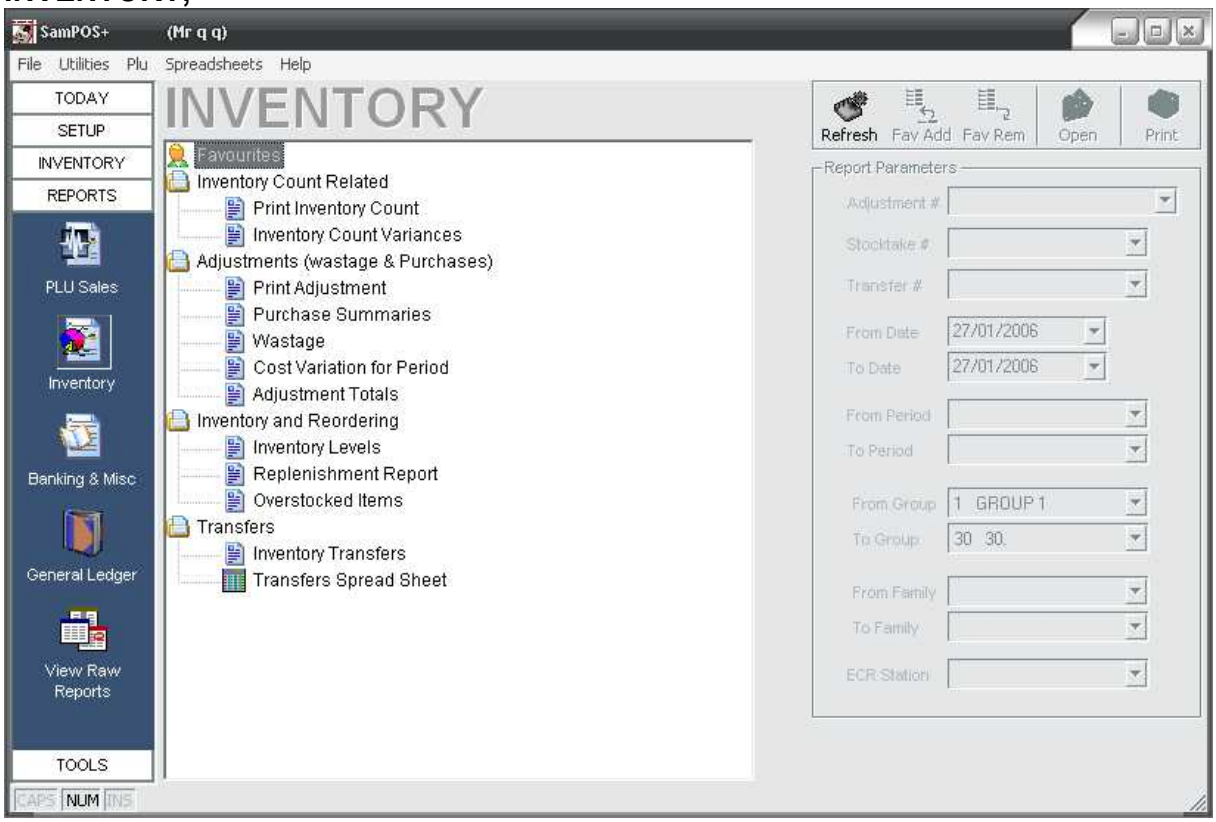
Spreadsheet Reports are a configurable alternative to the standard static reports, and graphical charts offered by SAMPOS+. For versions earlier than 3.2 spreadsheets are still available, the stylisation option has been added in later versions. Accessing the configurable spreadsheets is achieved easily from the main menu of SAMPOS+. Between the **PLU** menu and the **HELP** menu, there is a new menu called **SPREADSHEETS**.



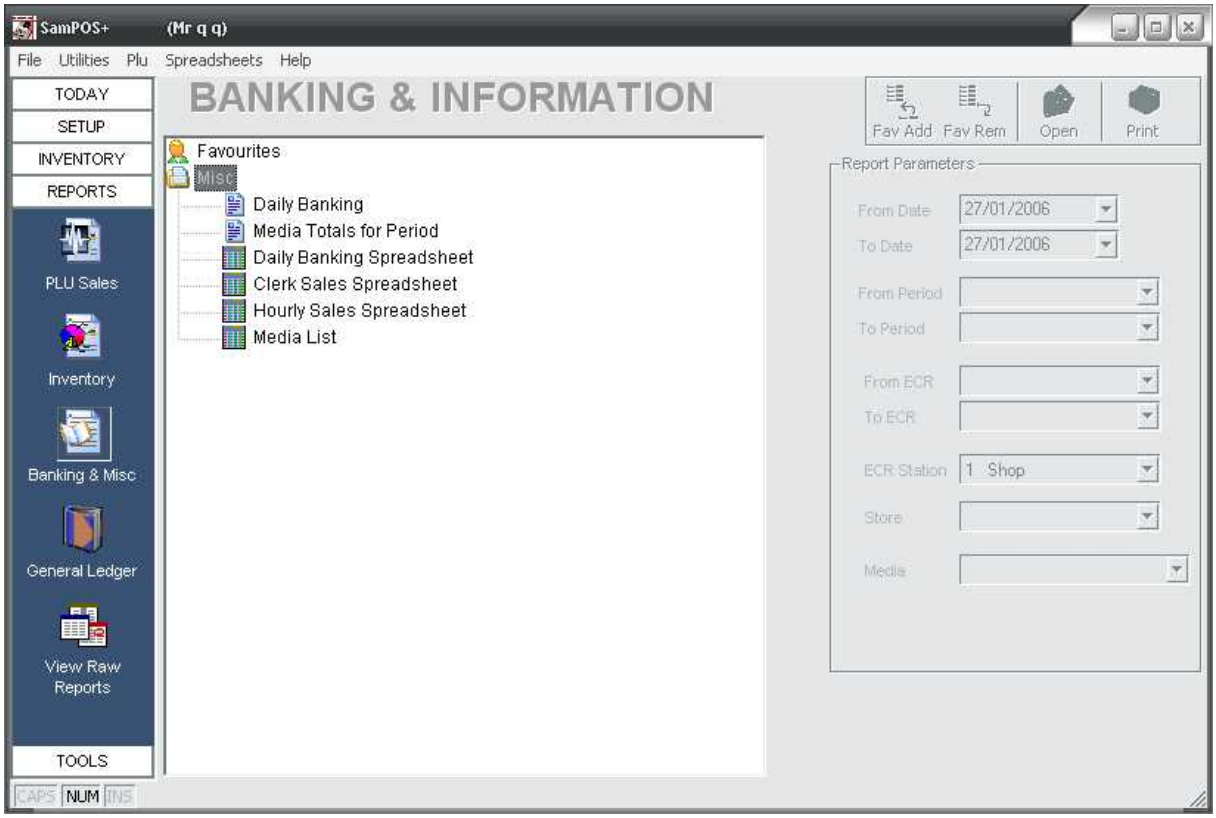
TIP: Spreadsheets are still accessible by going to the REPORTS button and selecting either the PLU SALES,



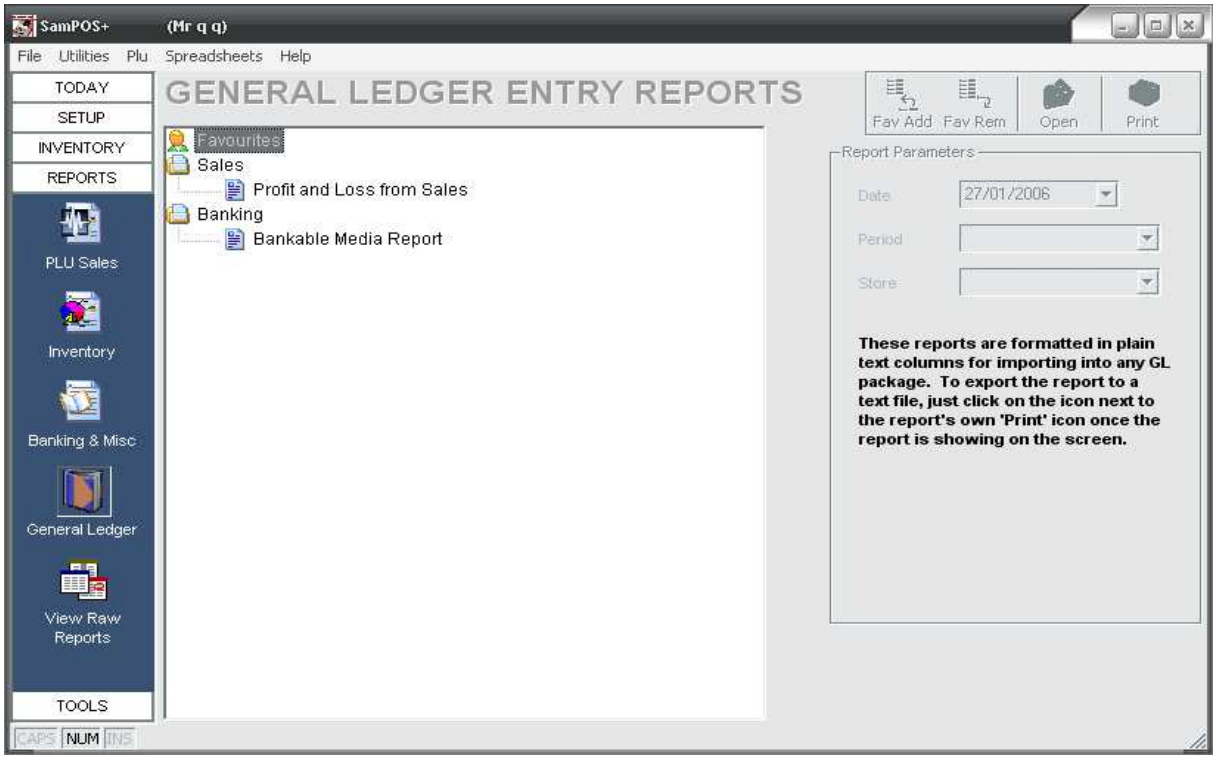
INVENTORY,



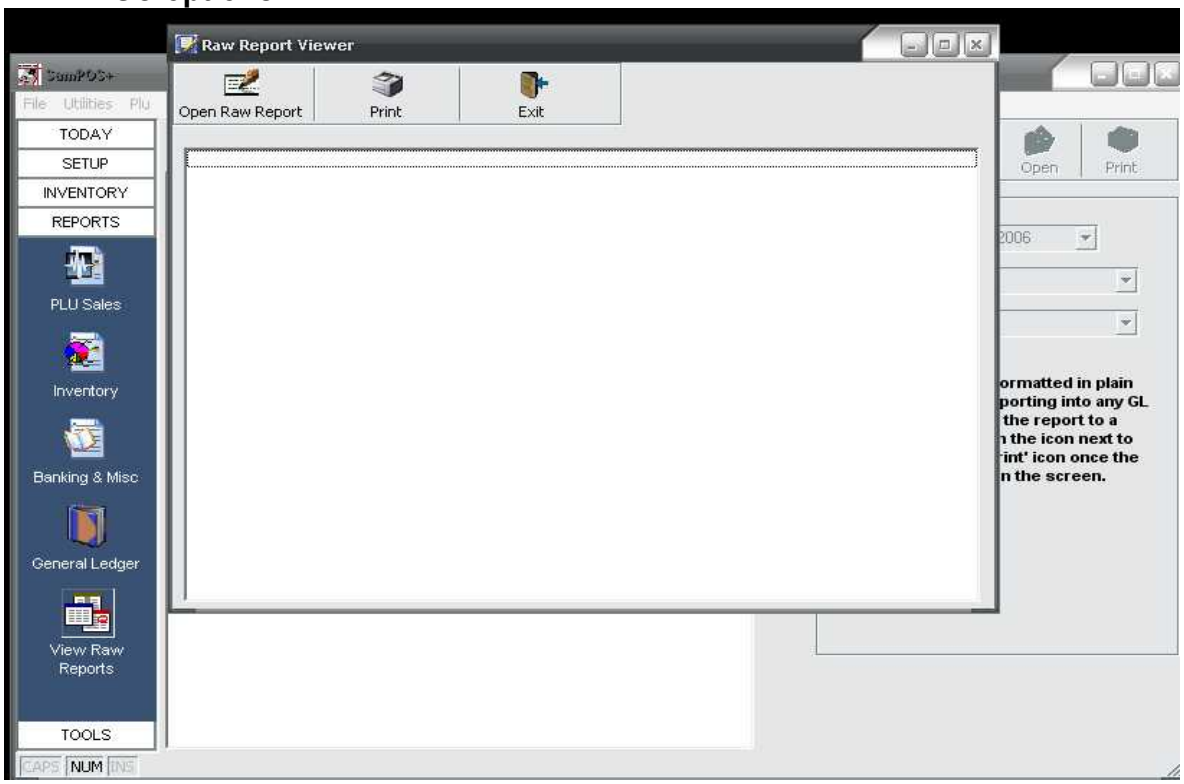
BANKING



GENERAL LEDGER.

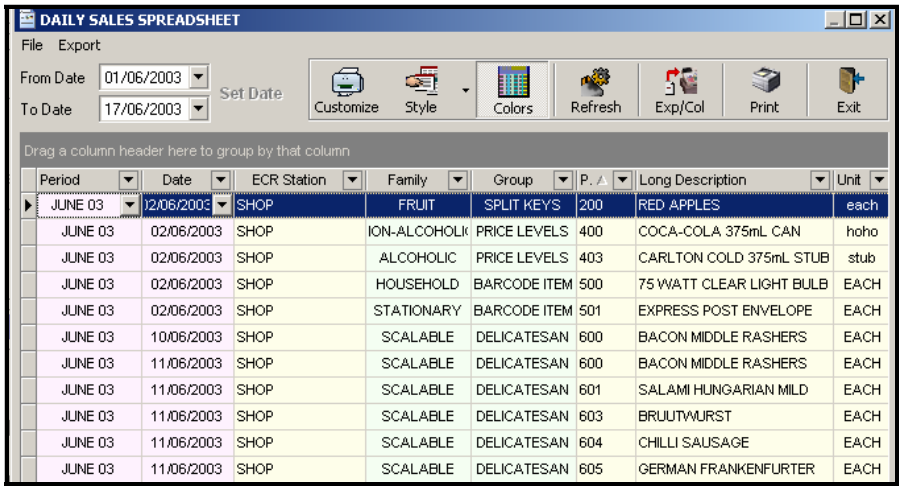


AND MISC options



Any one of the five spreadsheets are capable of being formatted into an unlimited variety of reports. Each variation is saved as a "**Style**" and is available to all users of SAMPOS+; unlike the "**Favourite**" reports.

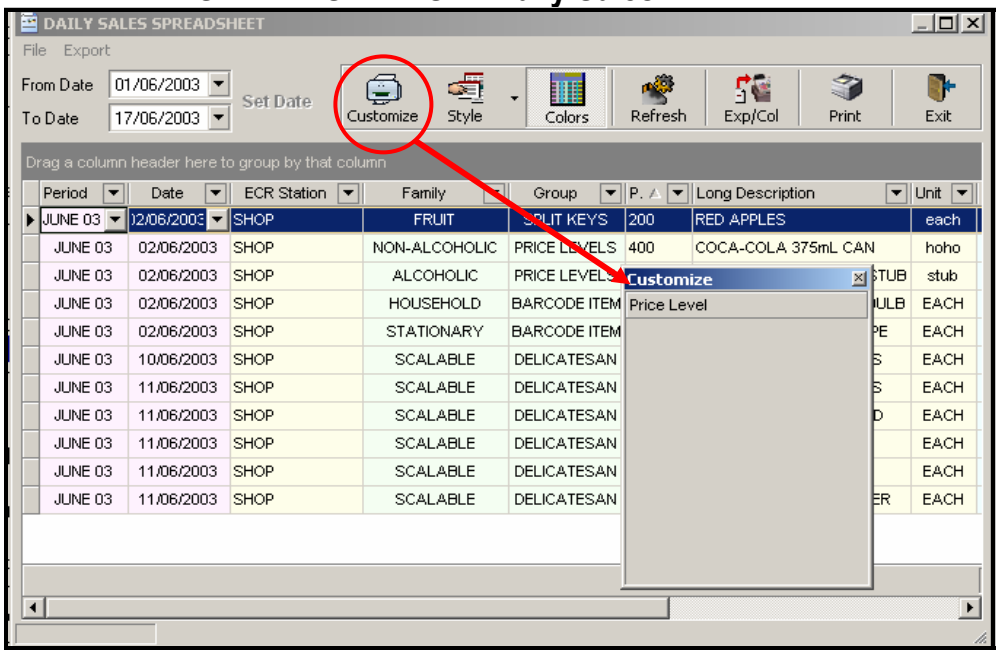
To begin formatting a spreadsheet you must first open one from the "**Spreadsheets**" drop-down menu.



Period	Date	ECR Station	Family	Group	P.	Long Description	Unit
JUNE 03	02/06/2003	SHOP	FRUIT	SPLIT KEYS	200	RED APPLES	each
JUNE 03	02/06/2003	SHOP	ION-ALCOHOLI(	PRICE LEVELS	400	COCA-COLA 375mL CAN	hoho
JUNE 03	02/06/2003	SHOP	ALCOHOLIC	PRICE LEVELS	403	CARLTON COLD 375mL STUB	stub
JUNE 03	02/06/2003	SHOP	HOUSEHOLD	BARCODE ITEM	500	75 WATT CLEAR LIGHT BULB	EACH
JUNE 03	02/06/2003	SHOP	STATIONARY	BARCODE ITEM	501	EXPRESS POST ENVELOPE	EACH
JUNE 03	10/06/2003	SHOP	SCALABLE	DELICATESAN	600	BACON MIDDLE RASHERS	EACH
JUNE 03	11/06/2003	SHOP	SCALABLE	DELICATESAN	600	BACON MIDDLE RASHERS	EACH
JUNE 03	11/06/2003	SHOP	SCALABLE	DELICATESAN	601	SALAMI HUNGARIAN MILD	EACH
JUNE 03	11/06/2003	SHOP	SCALABLE	DELICATESAN	603	BRUUTWURST	EACH
JUNE 03	11/06/2003	SHOP	SCALABLE	DELICATESAN	604	CHILLI SAUSAGE	EACH
JUNE 03	11/06/2003	SHOP	SCALABLE	DELICATESAN	605	GERMAN FRANKENFURTER	EACH

The spreadsheet we have accessed is the "**Daily Sales Spreadsheet**", but as you can see there is far more information than we can actually fit onto the screen. We can format and style this report to hide unimportant information, and group the report logically to make it easier to read.

SPREADSHEETS → Daily Sales



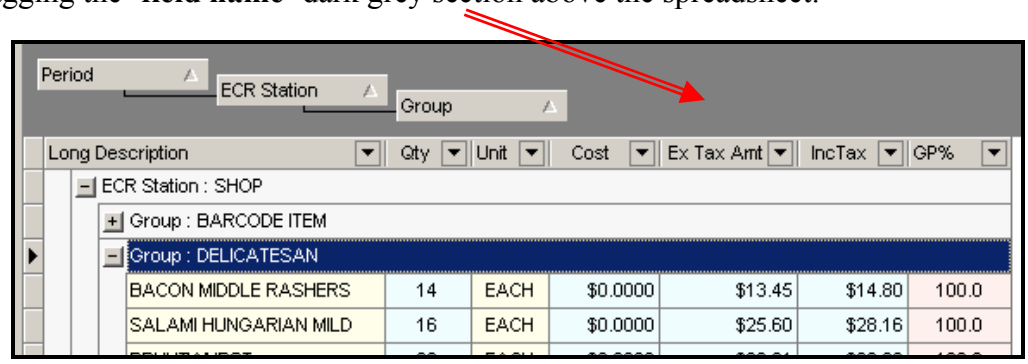
4.4.1. Customizing spreadsheets

To hide unnecessary details, you are required to customize the report. To do this you will left-click on the button labelled "**Customize**" at the top of the report, this opens a small box, like the one you see in the above screenshot. Fields that you wish to hide simply get dragged into this box.

TIP: when dragging a field, you will actually drag the 'field name' across to the 'customize' window.

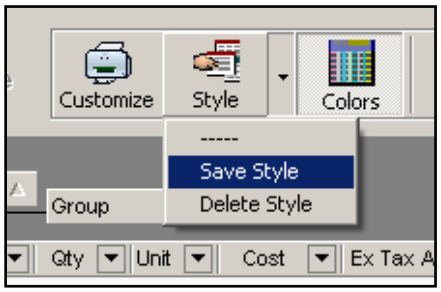
4.4.2. Grouping spreadsheet data

To make a spreadsheet easier to read we can group the data into a logical order by dragging the '**field name**' dark grey section above the spreadsheet.



This screenshot shows an example of '**nested grouping**' where we have used the "**Period**" field, followed by the "**ECR Station**" field, and finally the "**Group**" field to produce a sales spreadsheet which firstly reads easier than the original spreadsheet; secondly, reports **PLU sales by Group – by ECR Station – by Period**.

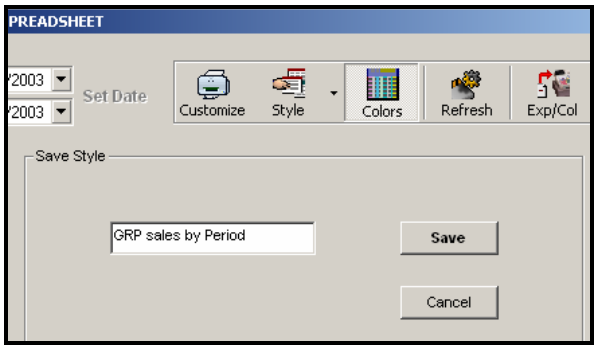
4.4.3. Saving a Report Style

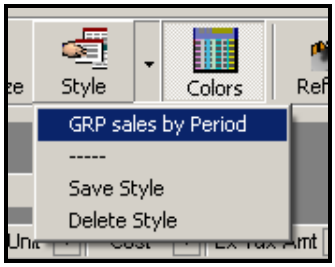


To save a report style, go to the button labelled "**Style**" next and left-click on the down arrow, and select the option "**Save Style**"

Give the Report Style a name, and press the "**Save**" button.

NOTE: pressing 'Cancel' will abort the function.





Once saved, the report style is accessible to any user by selecting it from the drop down menu.

TIP: Report Styles are available to any user who accesses SAMPOS. They are not restricted to the user created the report style.

4.5. Program Maintenance

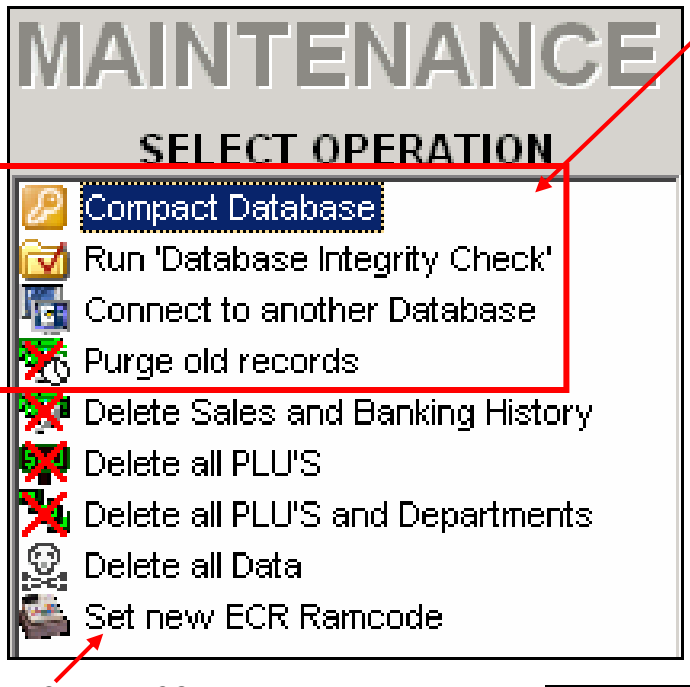
IMPORTANT: some of the functions in this section can cause permanent damage to you datafile. Incorrect usage can result in loss of data.

STEP 1: Before running any Program Maintenance function ALWAYS take a fresh back-up. Refer to Section 3.8.3 – Doing A Back-Up.

Several database maintenance tools are found in the Program Maintenance section of SAMPOS+. These are designed to ensure the integrity of the data in the database remains intact. It can also be used by '*power users*' when connecting to other SAMPOS+ databases. To access the Program Maintenance functions go to:

TOOLS → Maintenance

NOTE: we recommend strongly that only one or two adminstrative users have access to the Program Maintenance section. Use the Employee Security settings to lock out unauthorised operators. Refer to Section 3.9.2.3.1 – Security Restrictions for information about restricting employee access to SAMPOS+.



MAINTENANCE PROCEDURES ARE HIGHLIGHTED IN RED

COMPACT DATABASE: this optimises the database, and removes old, redundant internal backups. **Recommended maintenance: once a month**.

DATABASE INTEGRITY CHECK: should never be required, except in extreme cases after a computer crash during an import routine. **Recommended maintenance: six monthly**.

CONNECT TO ANOTHER DATABASE: for multi-user SAMPOS+ where workstations need to connect to a common database.

PURGE OLD RECORDS: will remove records older than a specified date (e.g. 5

SET NEW ECR RAMCODE: to used by the till technician when they change the EPROM version in the ECR. Nothing gets sent to the ECR(s). It is simply a switch which tells SAMPOS+ to engage the code for the new EPROM version.

THE OTHER FUNCTIONS DO EXACTLY AS THEIR NAME SUGGESTS.
UNLESS YOU WISH TO REVERT TO AN ABACUS; STAY AWAY FROM THESE FUNCTIONS.

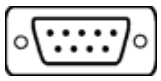
Additional information

Additional information may be found in the HELP menu and in the **documents** sub-directory of the SamPOS+ installation disk.

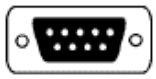
5. Appendix

5.1. Wiring Diagrams

5.1.1. Direct connect (no modem)

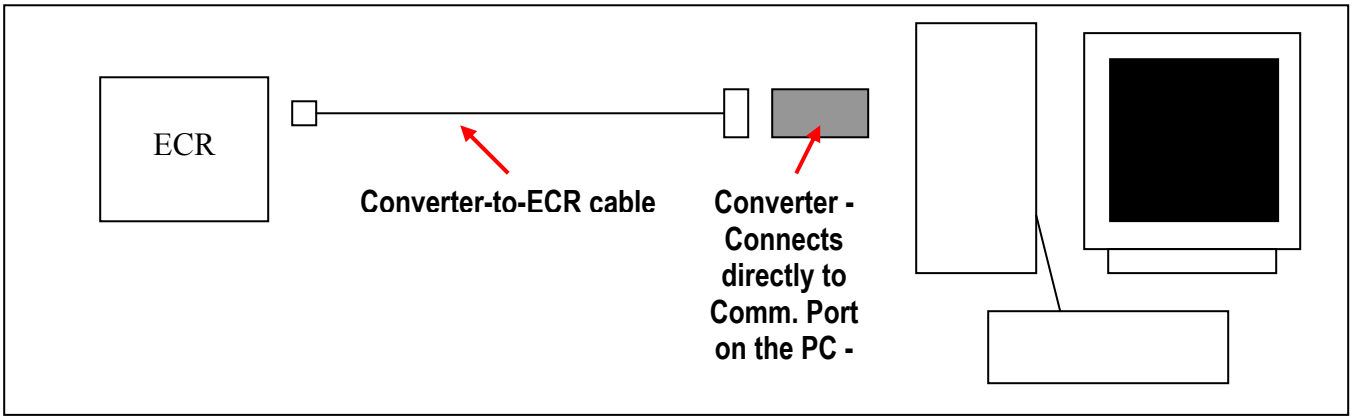

DB9 Male

male			female
DB9 ER 380			DB9 PC
RxD	2	----------	3
TxD	3	----------	2
Dtr	4	----------	6
Gnd	5	----------	5
Dsr	6	----------	4
DSR	6	----------	6
RTS	7	----------	4
CTS	8	----------	5


DB9 Female

5.2. IRC Topology

5.2.1. Direct



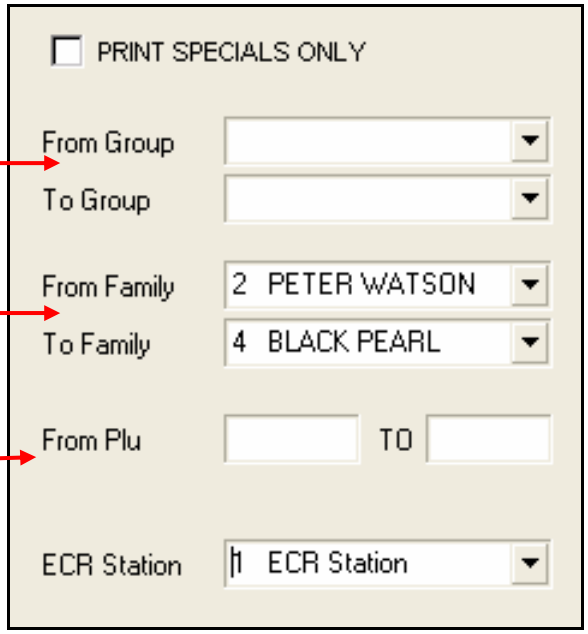
5.3. Export label information from Sampos+

The text file which is generated when exporting label data can be found at '**c:\program files\sampos\labels**'.

1. Go to **TODAY → Interfaces**

2. Click on '**Export TXT file for generic label software**'

3. Set up the parameters of the export file:
   Either:
   a. **Group**
   b. **Family**
   c. **PLU number range**



4. Select the **ECR Station**

5. When the parameters are set-up, click the '**DO OPERATION**' button from the toolbar to generate the text file.

6. Press **OK** when the process is completed. The text file is automatically deposited to "**c:\program files\sampos\labels**".

5.4. Technical Notes for initial set-up of ER-380

Out-of-the-box Memory Allocations are:

b) PLUs: 1000
c) # PRICE LEVELS: 1
d) # CLERKS: 10
e) # GROUPS: 20
f) # EJ LINES: 1500
g) # CHECKS: 20
h) Y=HARD / N=SOFT: N
i) # LINES/SFT CHK: 50

There are eight (8) options in the memory allocation screen.

i) **# PLUS**: this combines PLUs and Barcodes. They are held in the same table in the ECR.
ii) **# LEVELS (1-5)**: Enter the number of price levels which will be active on this ECR.
iii) **# CLERKS**: Set the maximum number of clerks which this ECR will support.
iv) **# GROUP TOTALS**: Set the maximum number of Groups the ECR will support.
v) **# EJ LINES**: Denotes Electronic Journal Lines, and this sets the maximum number of said lines in this ECR. When using the SamPOS+ Polling and Inventory Software you may set this value to zero, as the ECR does not allow the communication software (SamPOSComms) to retrieve this information.

NOTE: **# CHECKS**; **HARD OR SOFT CHECK**; and **# LINES/SOFT CH** are not specific to the relationship the ECR has with the SamPOS+ Polling and Inventory Software. They are ECR-centric and govern the extent of the unit functionality.

Continue filling in each variable until complete. Press the **ENTER** button after the setting "**LINE/SOFT CH**". The screen will display '***ARE YOU SURE (Y/N)***'. A 'No' will display as the default answer to the question. If you wish to implement the new allocation you have entered, press the "**YES/NO**" button, followed by **ENTER**.

The message "**Please wait…**" displays until the printer either prints "**MEMORY ALLOCATION OK!**" or "**MEMORY ALLOCATION SIZE OVER**" if you attempt to allocate features requiring more memory than available.

Once memory allocation is complete the Service Mode menu will be displayed.

5.4.1.1. Serial Communications

If serial communications are being used then turn the ECR key of the **SM Control Lock** position, press Page Down to advance to the second page, and select depending on the Comm. Port you are using on the ECR select either option eight (8) or option nine (9).

When communicating over a Serial line, the communication parameters are:

BAUD RATE: 9600 → PARITY: NONE → DATA BITS: 8 → STOP BITS: 1

After setting the communication parameters you must also select the correct "**DEVICE FUNCTION**". For PC communication it must be set to the numeral one (1).

5.4.1.2. Tax Settings

Tax settings for the ECR are found by turning the ECR key to the **PGM Control Lock** position, and selecting option two titled "**SALES TAX**". There are four tax rates available in the ECR, and these must line-up with the correct tax rate(s) being used in the SamPOS+ Polling & Inventory Software.

For each tax rate you will be required to enter a description using the alpha-numeric programming keypad (an overlay is found in the front of the ECR manual), and select a Tax Type.

If you were using tax rate number one (1) you would undertake these steps to set up tax rate 1 in the ECR, and in the SamPOS+ Polling & Inventory Software.

i) **TAX RATE NUMBER**: After switching the ECR key to the PGM Control Lock position and selecting option two (2); ensure that "**TAX NUMER (1-4)**" is set to display the numeral 1. This tells the ECR that wish to set-up its first tax rate. Press the "**CASH (ENTER)**" to confirm your selection.

ii) **DESCRIPTION**: Use the alpha-numeric keypad overlay to type in a description for the tax rate e.g. "*STATE TAX*". Press the "**CASH (ENTER)**" button to confirm your entry.

iii) **TAX TYPE**: Option zero (0) is selected by default, so you simply need to press the "**CASH (ENTER)**" button again to confirm this choice.

Page two of the TAX PROGRAMMING screen asks you to define the rate of the tax. This is expressed here as a three decimal number.

6. Index

A

Account
  access, 13
  configuration, 13
  daily, 13
  month, 13
  period, 13
  quarterly, 13
  weekly, 13
Administrative
  account, 39
  password, 6
  setup, 6
  user, 39, 41
Age verification, 24
Appendix, 60
Applications, 5
Auto-Run, 5

B

Back office access, 41
Backup, 29, 38
  data, 37
  directory, 37, 38
  history, 37
  restore, 38
Barcode
  delete, 28
  new, 28
  number, 20

C

Cash register
  poll, 44
Clerk
  ECR, 42
Communications. *(See SamPOSComms)*
Communications port, 7
Compulsory field, 24
Computer
  requirments, 6
Condiment, 27
Configuration, 9
Control Panel, 5
  settings, 5
Cost, 29
Counts, 13

D

Date
  format, 5
  hired, 40
  order, 13
Dealer, 8

E

ECR, 43
  add, 17, 18, 22
  barcode, 7, 28
  clerk number, 42
  communications, 9
  configure, 7
  display, 27
  download, 7
  edit, 7, 17
  group, 11, 34
  import, 22
  memory, 7, 20
  multiple, 10, 11, 43
  parameters, 7
  sales, 43
  scales, 9
  scan, 28
  setup, 17, 19
  single, 11
  station, 11, 30, 43, 52, 61
  upload, 7
Electronic Cash Register. *(See* ECR)
Employee
  access, 39
  add, 40
  create, 39
  edit, 39
  management, 39
  number, 40
  picture, 40
  privilege, 39
  security, 39

F

Family
  add, 34
  assign, 35
  delete, 35
  report, 34, 35
  setup, 34

G

Gallonage, 27
Group
  add, 23, 24
  ID, 24
  number, 7, 20
  reporting, 23

H

Hash, 27

I

Import file, 32
Index, 64
Installation, 5
  directory, 5
Inventory, 13, 46
  basic, 46
  count, 49
  locations, 46
  minimum, 47
  new, 49
  par level, 46
  reorder levels, 46
  software, 5
  transfer, 51
IRC
  topology, 60
Item
  disable, 27
  non-taxed, 33
  single, 27

L

Label
  export, 61
Language, 5
  options, 5
License
  multi-location, 11
Location, 5
  multiple, 34, 35
Logon name, 41

M

Maintenance
  procedures, 59
Memory
  allocation, 20, 28
  parameters, 28
Multi-user
  environment, 38

O

Operating system, 6
  Windows 98, 5
  Windows XP, 5

P

Password, 41
PLU, 9
  add, 24, 26
  barcode, 7
  building, 22
  data, 5
  file, 22, 23, 24, 25
  flags, 27
  group, 34
  import, 22, 24
  multiple, 28
  number, 7, 20, 26
  price levels, 7
  uploading, 22
Poll, 5
  software, 5
Preset, 27
  override, 27
Price
  change, 30
  negative, 27
  sell, 29
Price level, 30
  names, 9
  number, 20
Print
  kitchen, 23
  red, 23
Printer
  connected, 23
Product, 30
  active, 31
  inactive, 31
  reporting, 53
  specials, 52
Program
  group name, 5
  maintenance, 59
Programming
  sampos, 21
Promo
  disable, 27
Purchases
  stock, 47

R

Reboot, 5
Receipt
  post amble, 21
  preamble, 21
  price, 27
  print, 27
Regional
  options, 5
  settings, 5
Registration, 8
  name, 8, 9
  number, 8
  single, 10
Report Style
  save, 58
Retrieval
  automated, 44

S

Sales, 13
  import, 43
  period, 13
  reports, 5
  retrieve, 43, 45
SamPOS+
  application, 43

install, 5
orientation, 14
settings, 7
speed test, 6
start, 6
Security
restrictions, 41
settings, 39
Serial number, 8
Setup
defaults, 5
finish, 5
Sites
new, 23
Spreadsheet, 25, 54
grouping, 58
reports, 54
Stock, 13
adjustments, 13, 47
Stores, 10
System files
setup, 5
update, 5

T

Table
price, 27
print, 27
Tax
disable, 9
flag, 33
rate, 33, 63
settings, 63
type, 63
Trading, 13
Transfers, 13