User's guide

Hairdresser & Beauty Centers

Last update: June 27th, 2018

Version: 1.43.2.14

Summary

1. Installation

The end user can download the HioPOS Cloud App using the link:

apk.icg.eu/13698

HioPOS Cloud will guide the user through the various initial configuration screens so that, at the end of it, the point of sale is ready to start working.

Before installing the application, it is important to insure the Android terminal, Settings is updated so that the device has access to unknown sources (the application cannot be installed from Google Play).
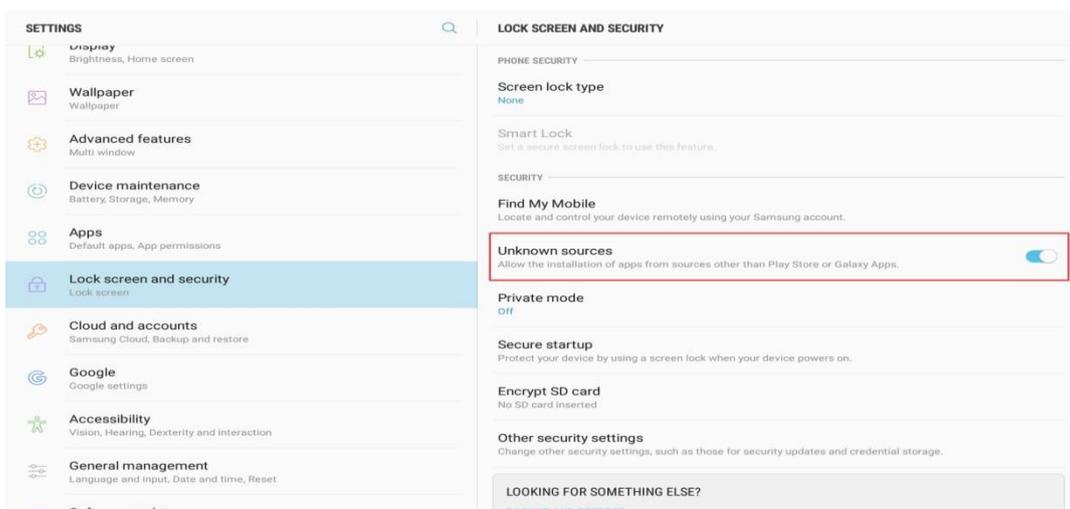
1.1. Select your language

HioPOS Cloud can be displayed in your language by selecting it from the list and starting the installation The HioPOS Cloud language can be updated in the *Settings* section, once the installation is complete.
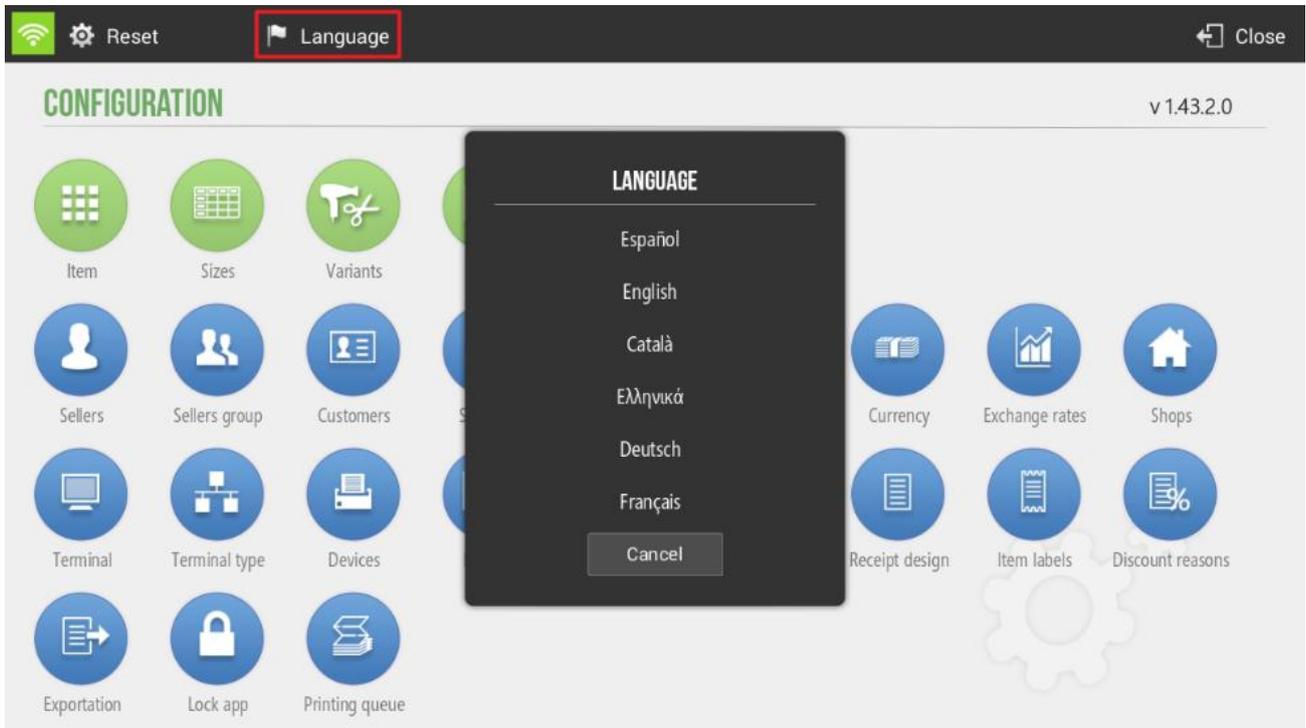
1.2. Identification

Enter the User Name (Customer email in Cloud License) and Password (password of the terminal in which you want to operate) in order to access the terminal. When finished, press continue.
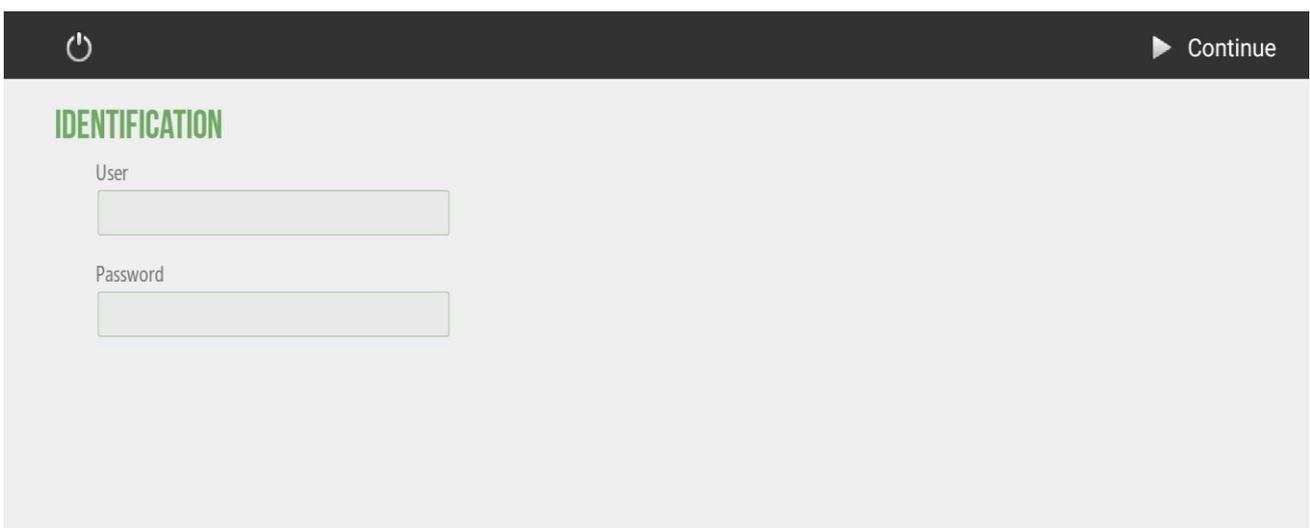
1.3. Store

Enter the information of your establishment and the terminal that you are configuring.

This information will be visible in the sales ticket and can also be modified from the *Configuration*, once the installation is finished.

1.4. Taxes

HioPOS Cloud comes with the taxes of your already configured country and region. You can modify them in this window or once the installation is finished in the *Taxes* section of *Configuration*.

The legal framework of each country is different, so the HioPOS Cloud application allows establishing different types of taxes.

1.5. Custom configuration

Select if the prices are inclusive of taxes.
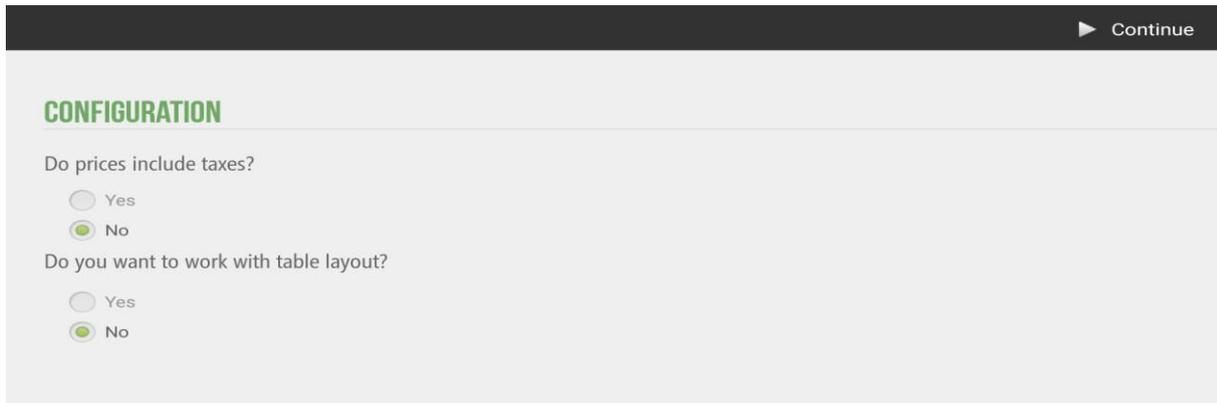
You can change these parameters later using the *Settings* options.

1.6. Import articles from file

HioPOS Cloud allows you to import articles using a CSV data file - files generated from a program such as Excel -. In the initial configuration the application itself asks if "you want to import".
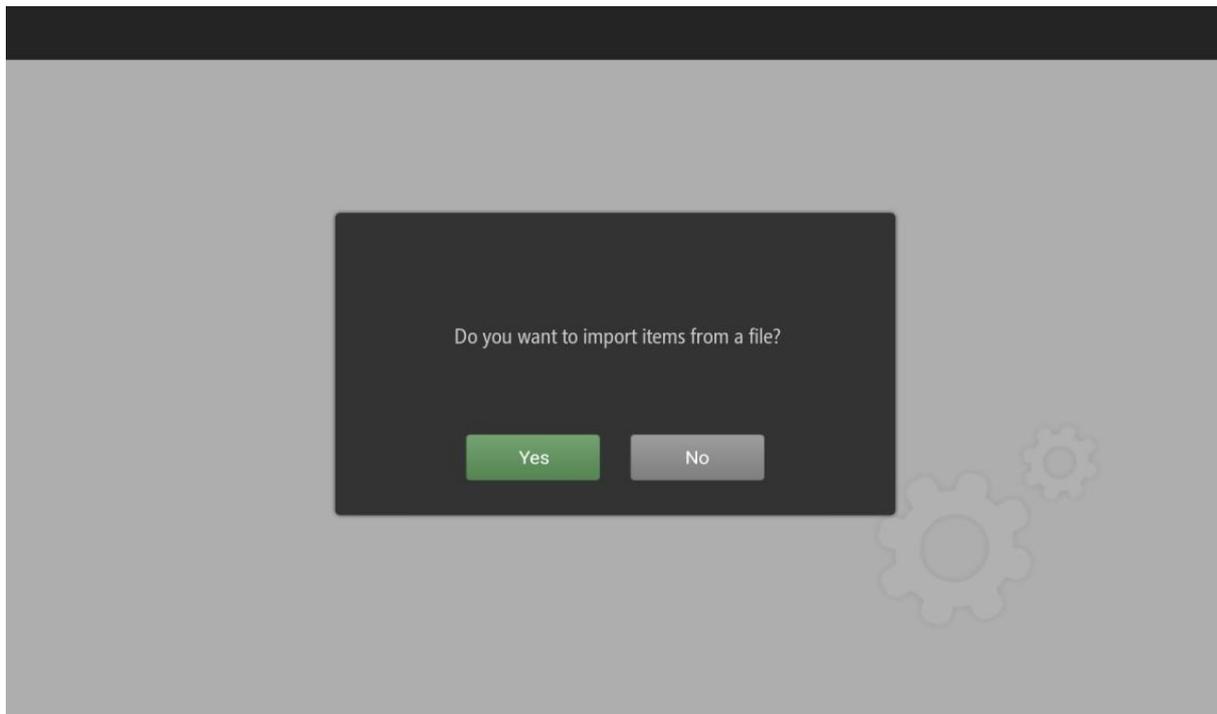
You can import items from a file. For this we will have to locate in *Configuration*, *Item* and *Edit* item. We will select *Import*, in the upper left margin and in the drop-down *Import file*.

Here you will find a file finder. You can select a file from DCIM, Card, Images or Downloads. In case that the importation of articles is carried out by means of a HioPOS, the user has, among many alternatives, to connect a USB with the aforementioned file.
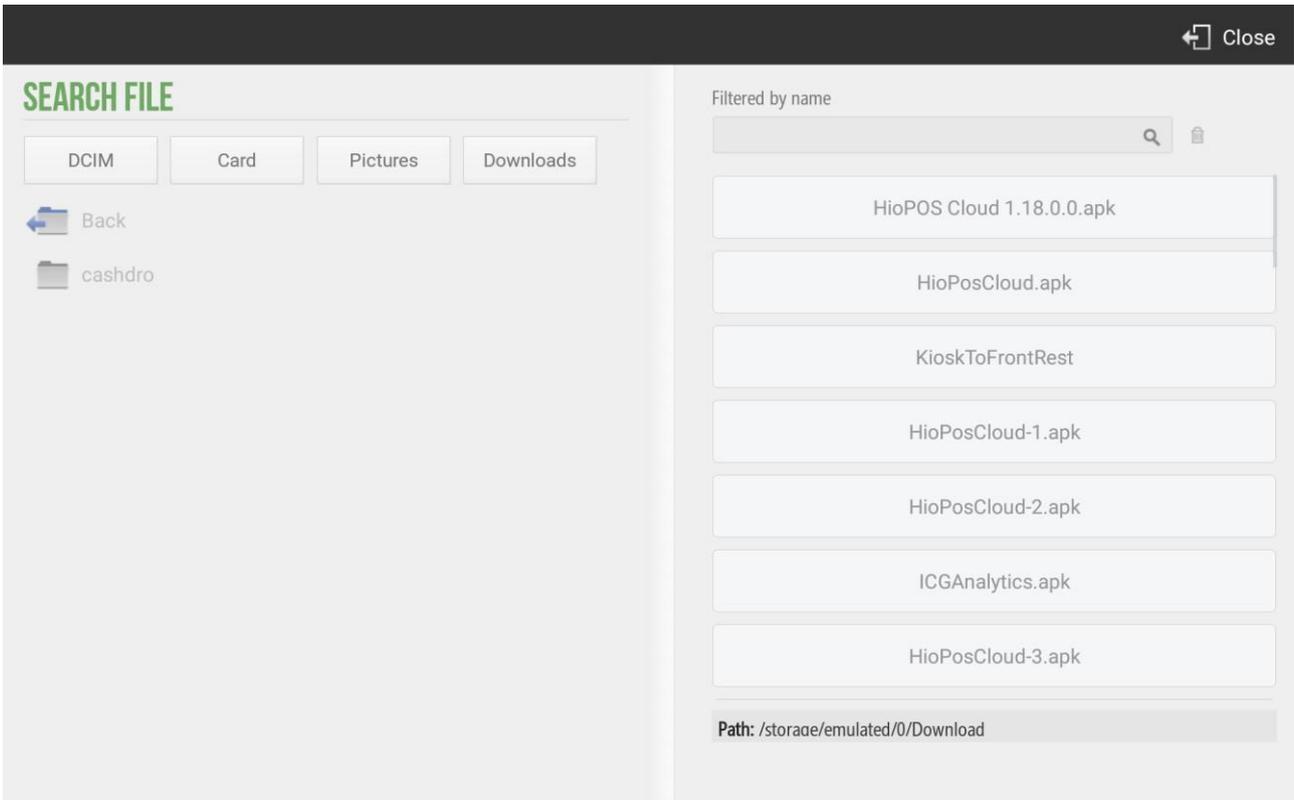
1.7. Quick creation of articles

HioPOS Cloud organizes articles in three main levels, *Family*, *Subfamily* and *Item*. To create new articles, you must first create *a New family*.

Once you have created and named the *New family*, you can create a *new Sub Family* or e*dit Items*. You can select the second option.

1.7.1. New items

In the article edit screen, you can create a new article and update Price, Reference and Barcode. You are also able configure if you have items that are in stock.
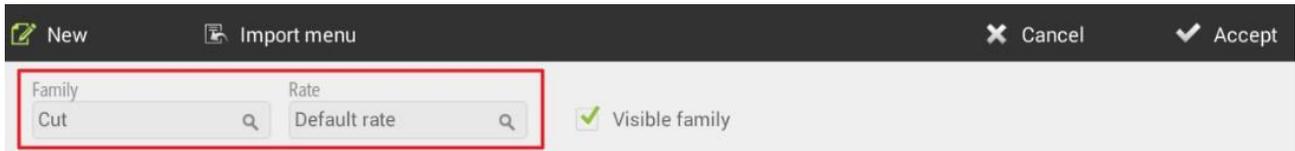
In the article edit screen, you can select from the top menu the family whose articles you want to edit, as well as the rate you want to modify.

Import menu, Gallery option offers you a database of items with images that have already been preconfigured in HioPOS Cloud to facilitate the installation and start-up. You can easily organize the images of the articles that you are editing.

Select your *type of business* and within it you will find the corresponding families with your initial selection, as well as the items in the same category. Simply select the items you want to add. HioPOS Cloud includes a variety of businesses created by default, which will allow you to configure your terminal with ease and speed.
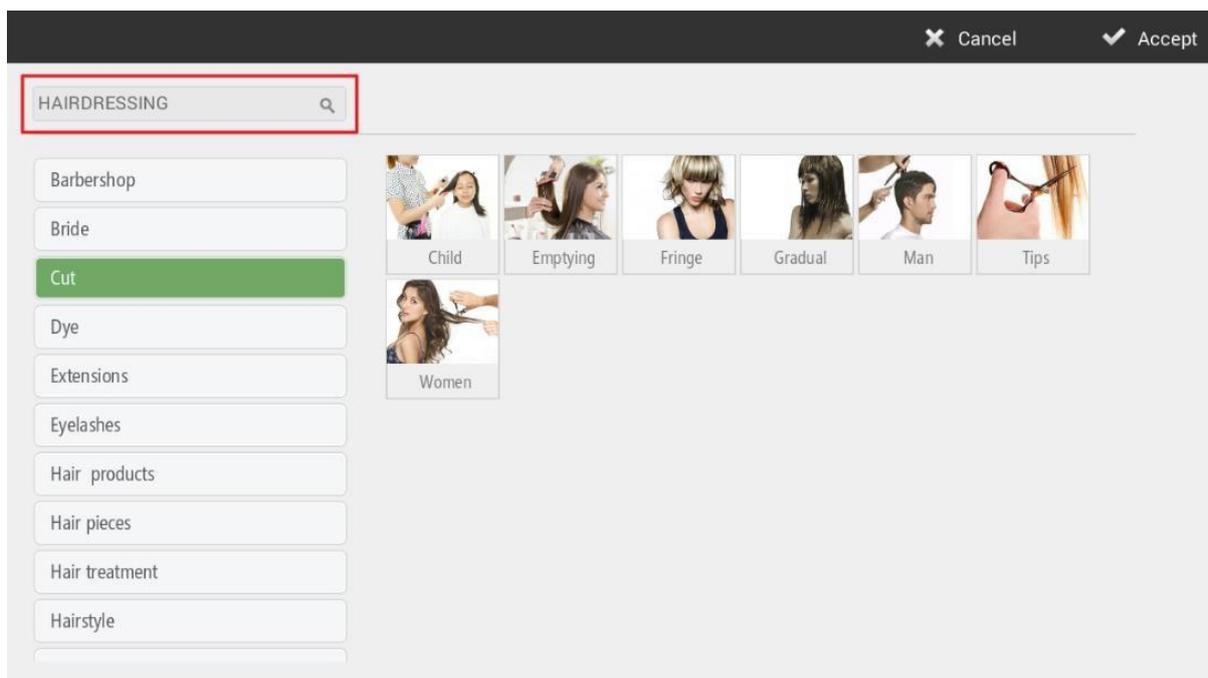
To modify more than one article at a time, you mark the initial boxes of each article you want to
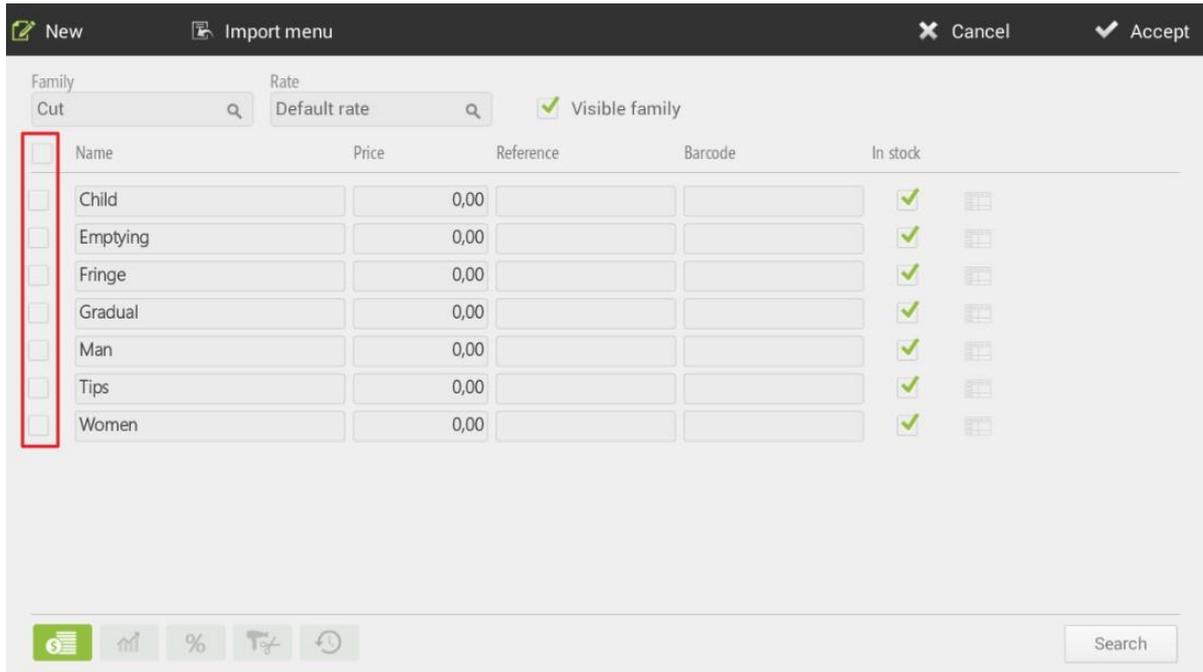
modify, then proceed to the modification.

You can also search for items by clicking *Search* button in the lower right-hand corner, so you can select the item you want directly.
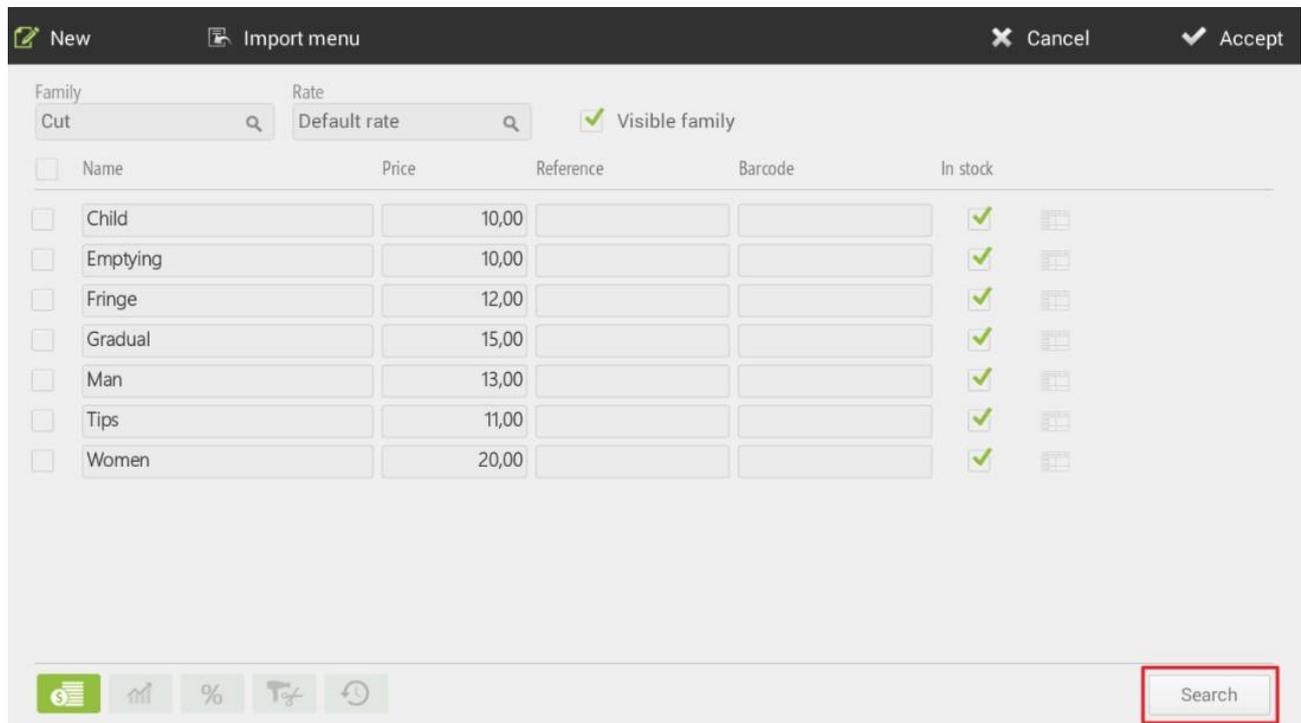
1.7.2. Margin's calculation

The second option at the bottom of the screen allows us to calculate profit margins.
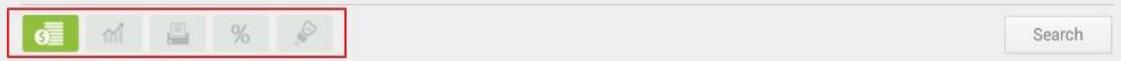
By selecting this option, you can set the prices of the products according to the cost of the products and the margin, in real value or absolute value that you want to obtain.

Firstly, you are going to introduce the *Cost* that you have of for each service/product. At this cost you will add the margin you wish to obtain by selling the same, the margin can be a nominal value or a percentage on the cost of the product. Once you have added the margin, the same software will propose the price at which you must sell it.
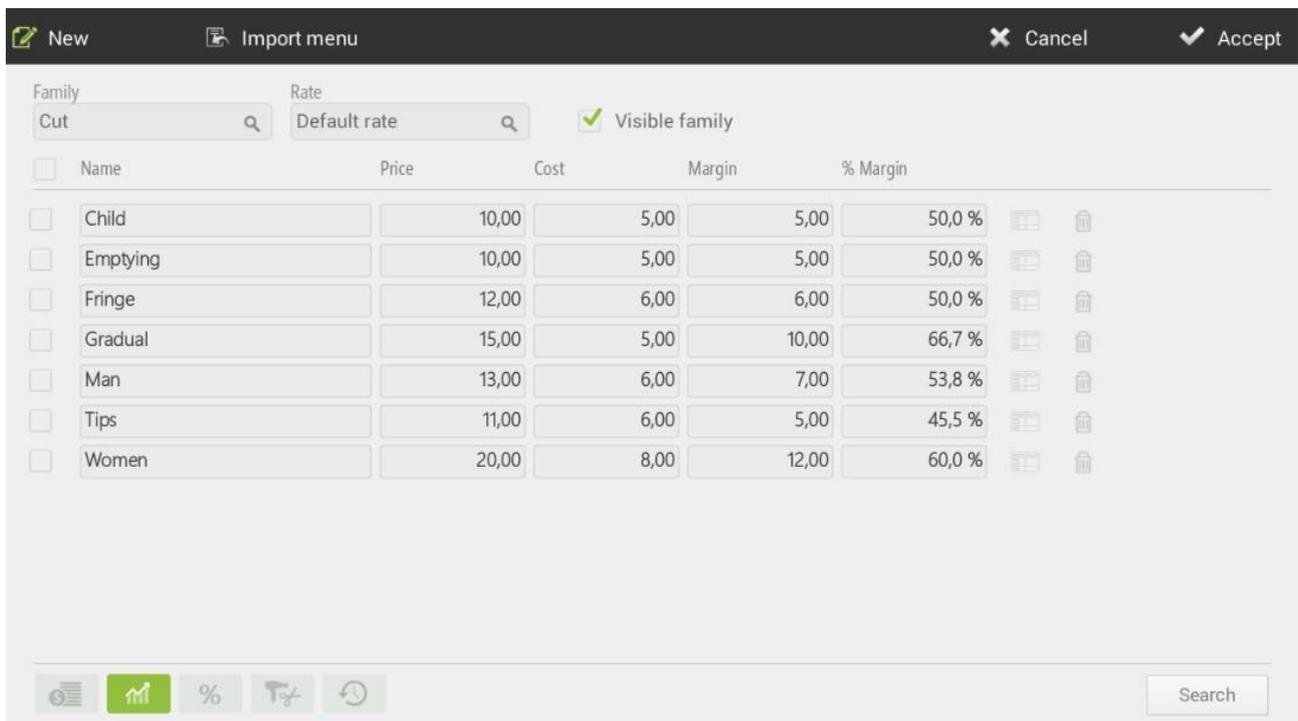
The price can always be modified as well as the other options, in order to be able to offer the price according to the margins that interests you most.

As you enter purchases in HioPOS Cloud, the cost of the items will be updated.

1.7.3. Tax configuration

The third option at the bottom of the screen allows us to assign taxes to each item.

If the items have different taxes, you can assign each item its corresponding sales tax. You can also remove taxes if it is different and purchase tax.

If all items in the store are subjected to the same tax, you do not have to assign the item-by-article tax on article editing, since you can set up the store level the tax that should be applied to all items. To do this, once the installation process is finished, assign the default tax in the *Default taxes* section of the *Shop Configuration*.

1.7.4. Multiple taxes configuration

HioPOS Cloud allows you to add more than one tax to articles, allowing to accumulate them or not. The configuration of these can be done through the *Taxes section*, in *Configuration* by selecting *New tax option.*

Once the creation of taxes has been done, you must apply them to the articles you want. For this you can go to *Configuration, Articles, Edit articles* and select the fourth section (%) of the lower left margin.

Once inside the *Tax Assignment* screen, if you want to apply an additional tax to an item, first you will need to select the tax that you want to apply and then select the other tax. The last one can be accumulated.

Once you have configured the tax for the articles, the ticket shows like the following one:

1.7.5. Assignation of variants

The variants are articles that are associated with the initial product, for that, to personalize the article on which it is applied. These may have a supplement or price increase or not, which adds to the total of the item.

To add variants, first they must have been created in the *Variants* section of the initial configuration. Variants are created by groups, so an item will be added to a group of variants instead of a single variant.
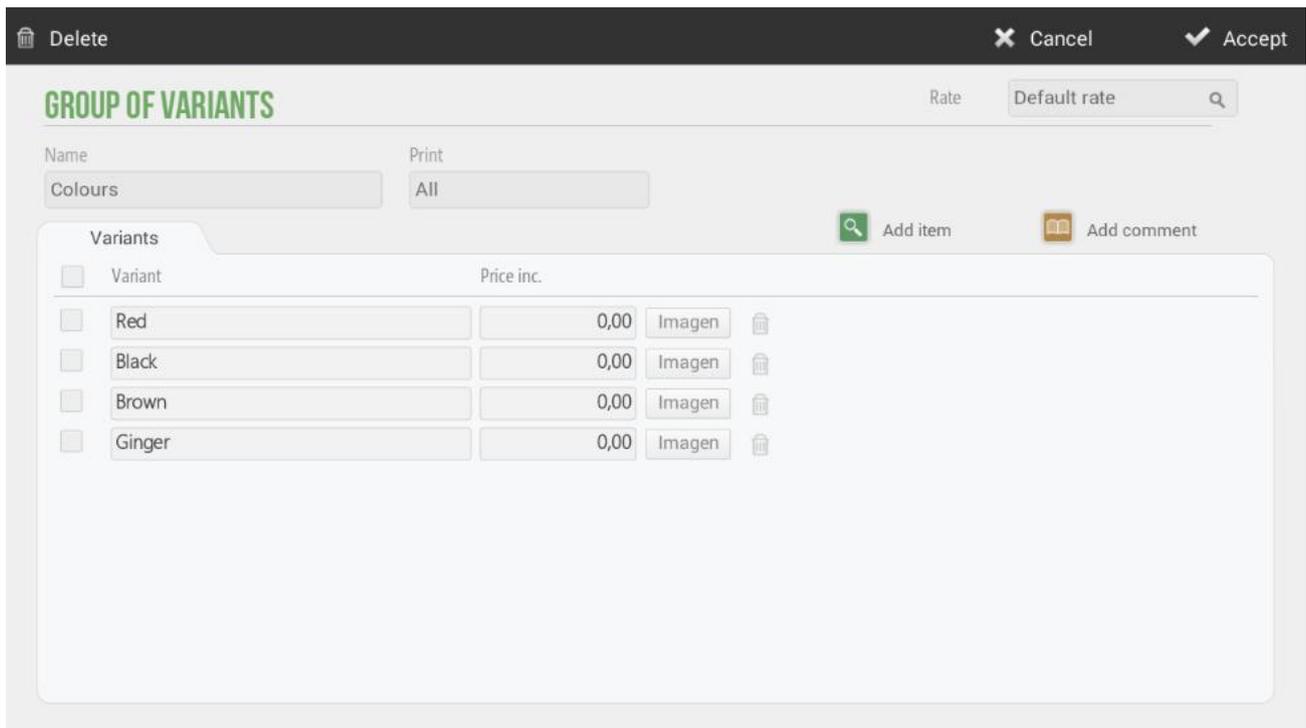
You can add as many literals as you like within a group of variants. You can also see in the previous capture; you can add an image to the article so that it is displayed on the sales screen.

As you can see at the previous image, we can select an item or a comment for the variants. It is very useful for getting a control of the stock of those variants in case are items.

You also have the option to select which variants you want to print so they appear on the sales ticket: all of them or those that just have a price increase.

The operation to add a group of variants to an article or service is the following: select a product that does not have a group of variants and then select from the list of existing groups of variants the one that you want to apply to the product.
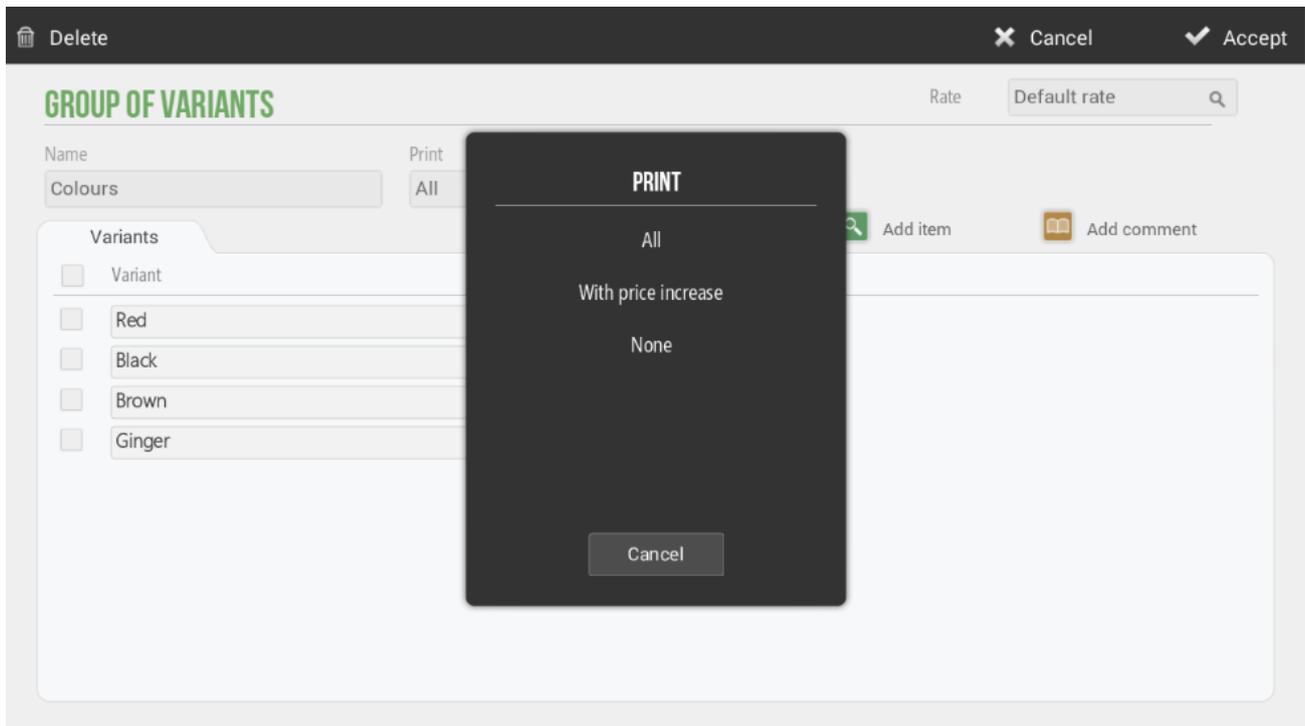
Each time a sale of that product or service is made, it will give you a choice between the variants of the group you have added. Examples of variants:

- Dye color: dark, clear...
- Color wash: full, half head…

1.7.6. Configuration of duration and assignation of groups of employees

In this section, a duration (in minutes) will be set for each rate service. These assigned minutes will be those that will be taken into account at the time of scheduling the service. For example, how can you see in the following image, performing a seaweed massage will last 20 minutes, so at the time of choosing this service for the client, 20 minutes will be reserved in the calendar. (1)

In addition, with this option you can assign to each service which group of vendors it belongs to. As you can see in the following image, the services related to massages, you will assign it to that group of employees called "Masseurs". (2)

For more details about the *Group of employees*, go to section 2.10 of this manual.
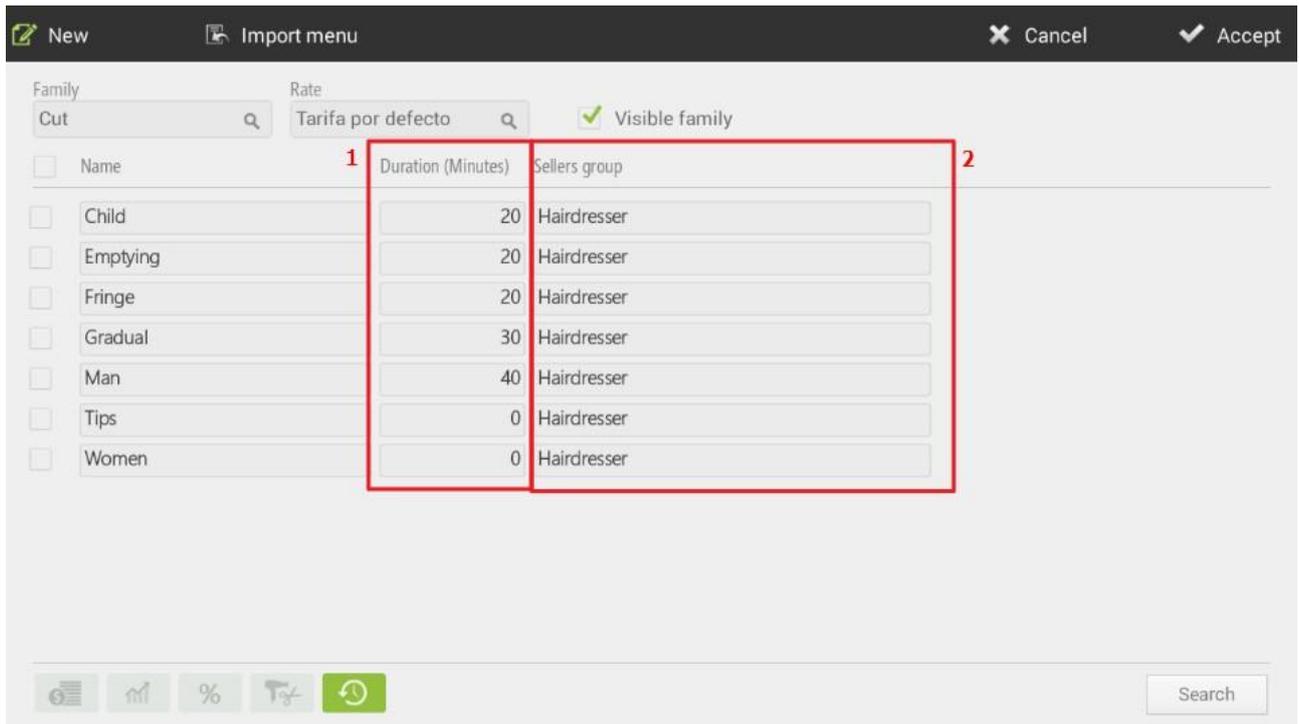
On the calendar screen you see employees who do not belong to the Group of Employees "Masseurs" in brown, being able to schedule the appointment to one of them.

Note that, if you are dealing with a sale of a customer and select a service which is not assigned to a group of employees, at the time of scheduling, instead of choosing by Group, you can choose among all the vendors configured for that establishment.
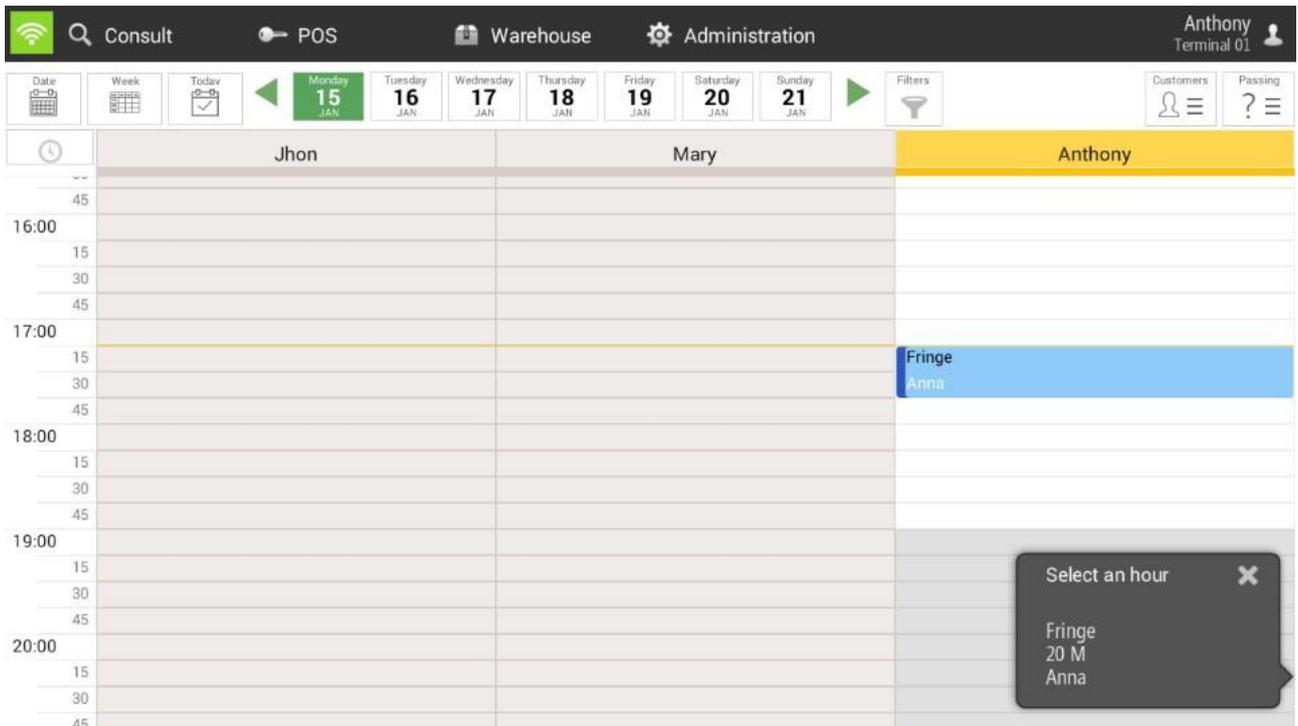
1.8. Items edition

When you access *the Configuration Items* section, the following screen opens. From here, you can change the name of the selected family to delete it. It is necessary to emphasize that you cannot delete a family with items inside, so if you want to delete a family first you must delete all the items included.
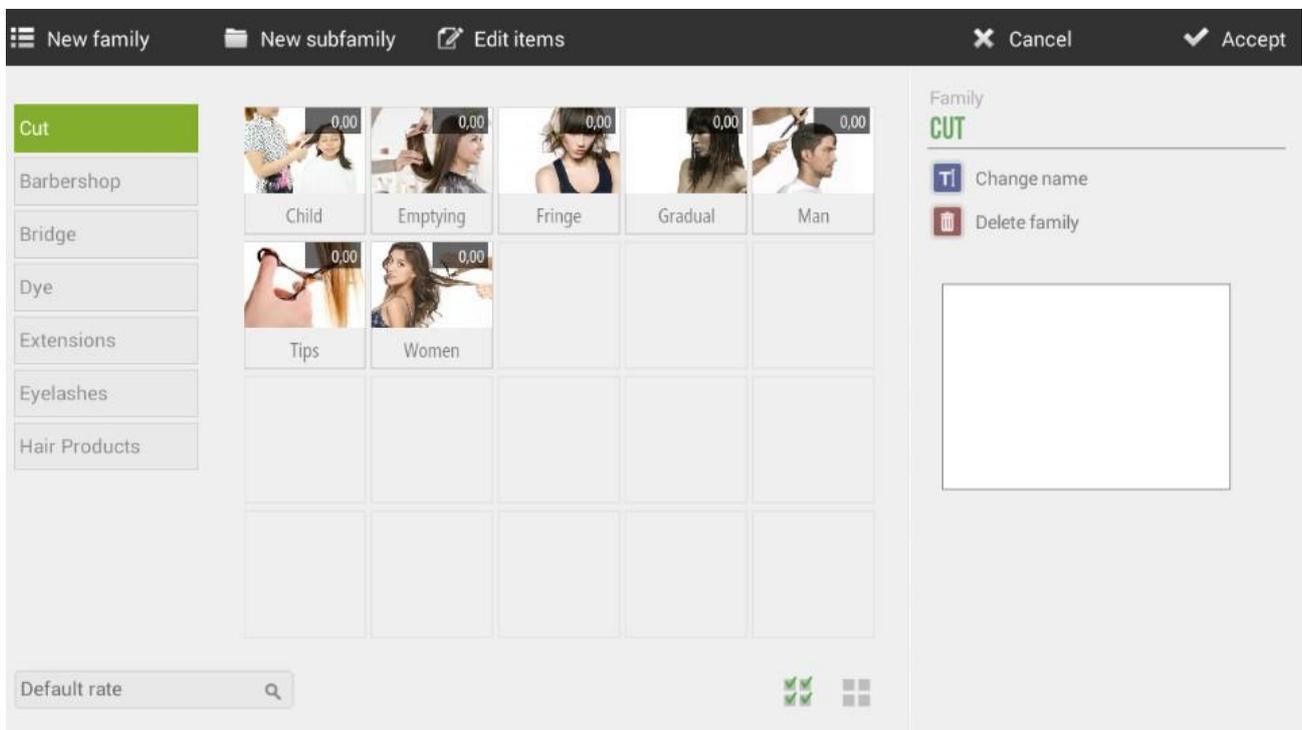
In the white box that appears on the right margin of the screen, you can select an image for the family. This image will not be reflected in the POS, but yes if you have a Terminal kiosk or Electronic Menu configured.
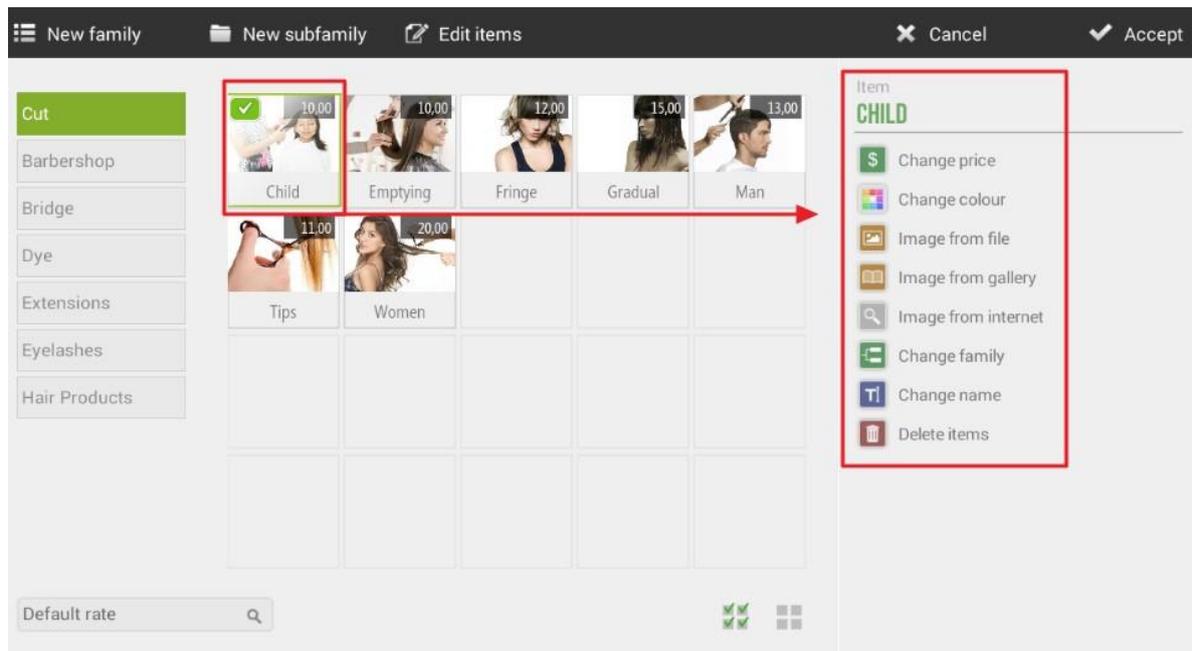
Selecting on top of an article, the following options related to this article will be opened:

- Change price: allows you to change manually the price of the selected item.
- Change color: this option changes the color of the item, whether it has another color or an image.
- Picture from file: you can add an image looking for it in the terminal itself.
- Picture from gallery: you can add an image from the gallery according to the type of business, which ICG makes available to customers.
- Picture from Internet: this option allows you to search an image directly from the Google browser. When selecting, the Google page will be opened with the name of the article. To select any of the photos you must make a long click on the desired image.
- Change family: allows to change the selected article family. A pop-up will show all the families to select the desired one.
- Change name: allows you to change the name of the item.
- Delete items: delete the article.

2. Sales

2.1. Schedule screen

The calendar screen in HioPOS Cloud is the main functionality of the point of sale for hairdressing or aesthetic establishments, since they need this screen to keep track of appointments made or pending to be made. You can configure if you want to load the schedule screen when you enter the program in the *Settings* section

It shows a calendar, by default to date, with all the sellers configured and the services scheduled with their corresponding status, by time and seller.

On this screen you can see the gray cells, which correspond to the non-working hours and the blank cells, which correspond to the working time, you can configure it in *Settings, Shifts*. The yellow line that appears on the calendar tells you what time.
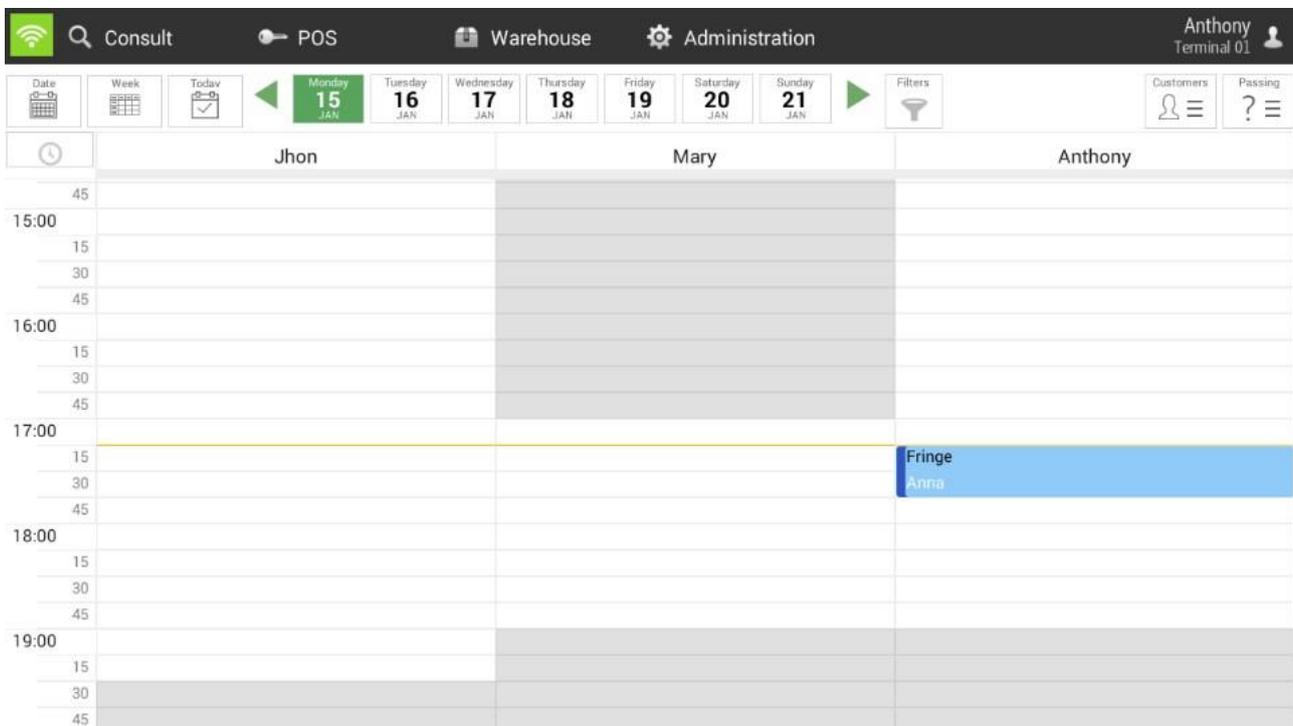
The following points detail all the possibilities of scheduling and selling a service.

2.1.1.   Schedule tab

The Calendar button allows you to be able to select any date in a faster way.
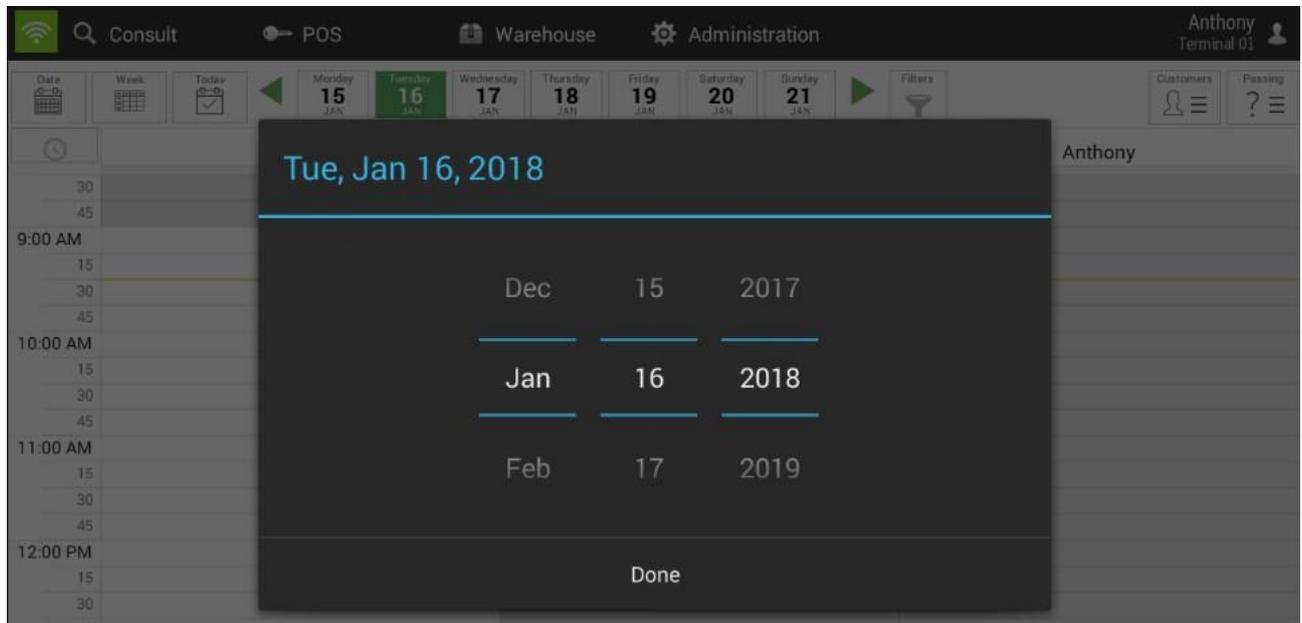
2.1.2. Week tab

The week button allows us to view our agenda in a weekly table.

The next image shows how the weekly format is.
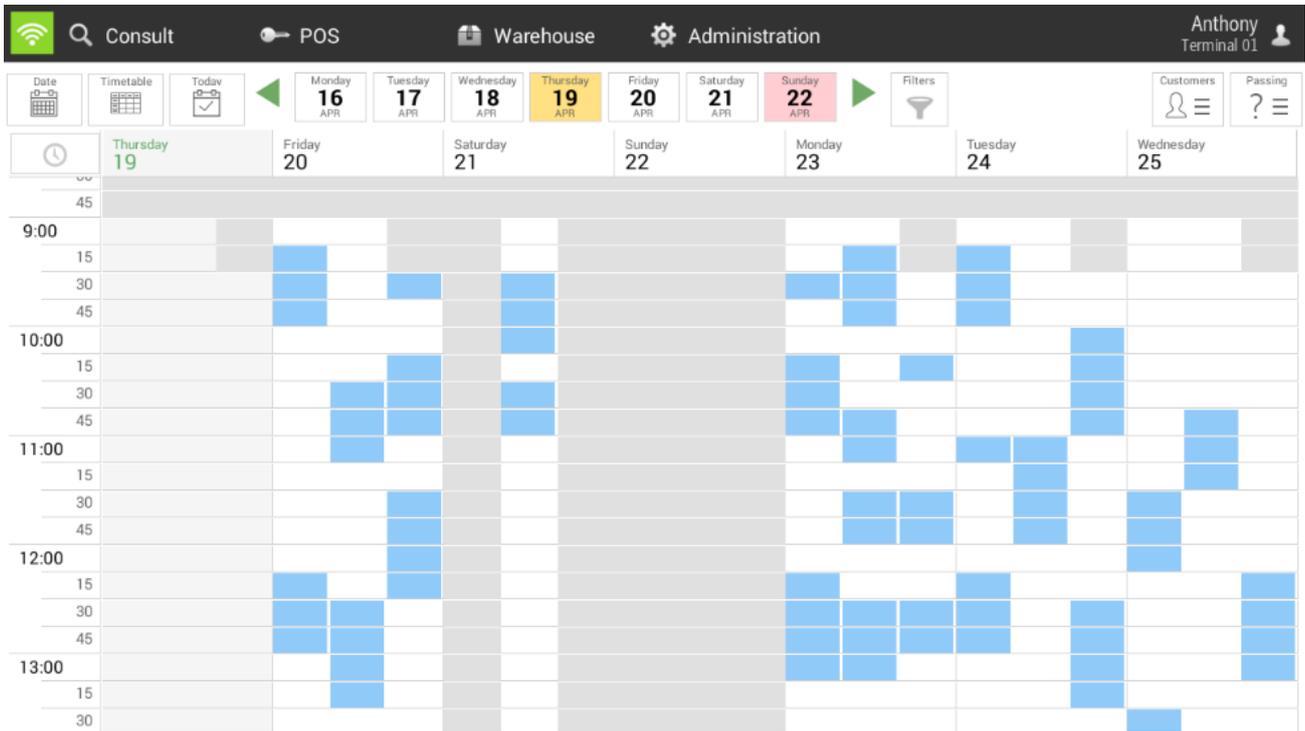
If we go to the *Filters* options we will be able to configure different options.
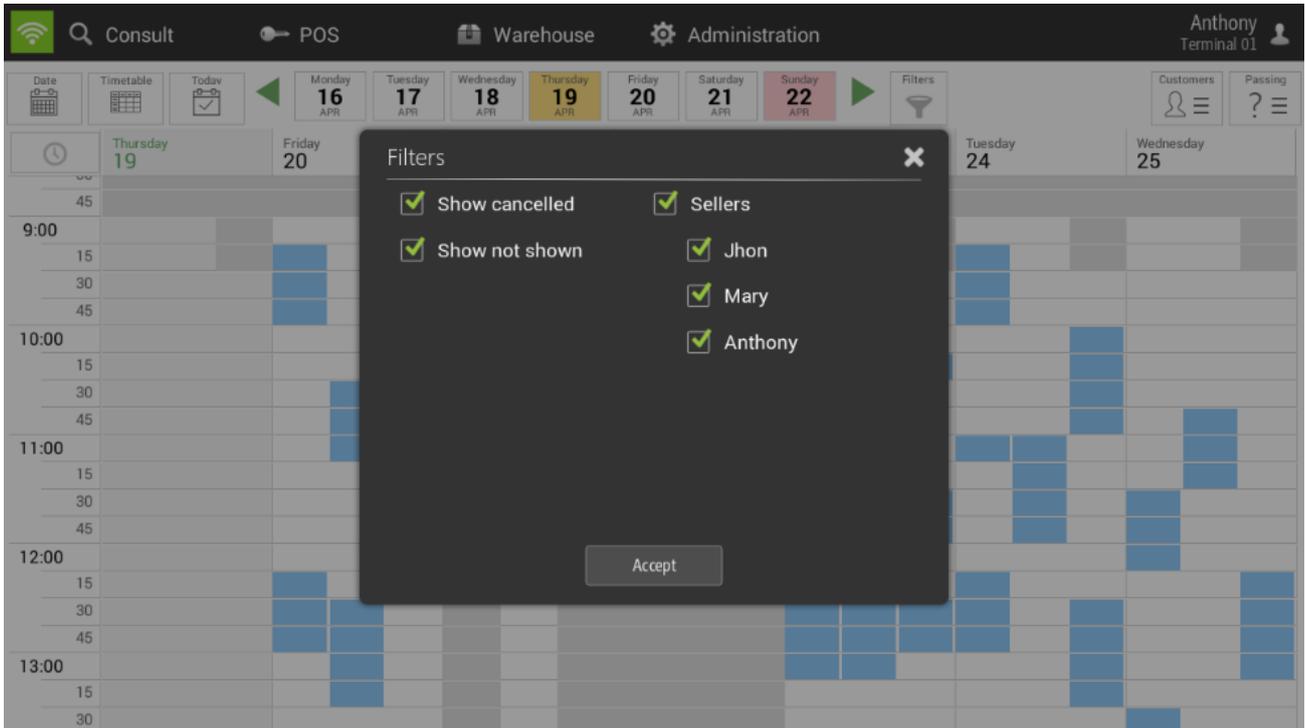
Once you are inside the calendar display in weekly format, you can click on the different time slots to see a pop-up with information on the different services to be performed.
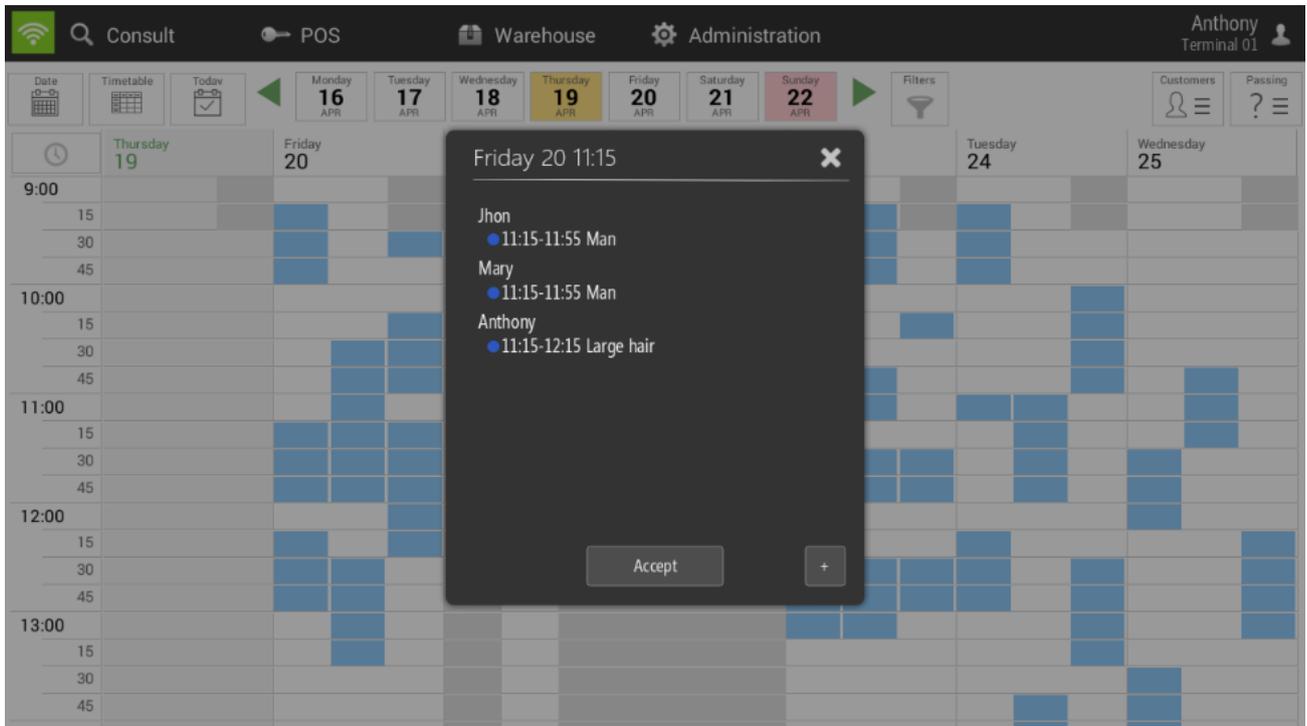
If you select on the "+" button we can add new services at this specific time and date.

On the display screen in graphic format, you can observe the different states:

- Green: Service completed
- Red: Service canceled
- Blue: Scheduled service
- Yellow: Service in process
- Gray: Client not presented (no show)

2.1.3. Today tab

This button allows you to return to today if you are on another date.

2.1.4. Schedule bar

This bar shows 7 days a week (from Monday to Sunday) and allows you to select any of them. Through the green arrows that are at the ends, you can change the week, also you can do it by sliding your finger from one side to another.

2.1.5. Filters

This option allows you to filter by the different states of the services already planned in the calendar, but also has the option to filter by group of employees.

Selecting in *Filters* will open a new pop-up to filter between the different available states:
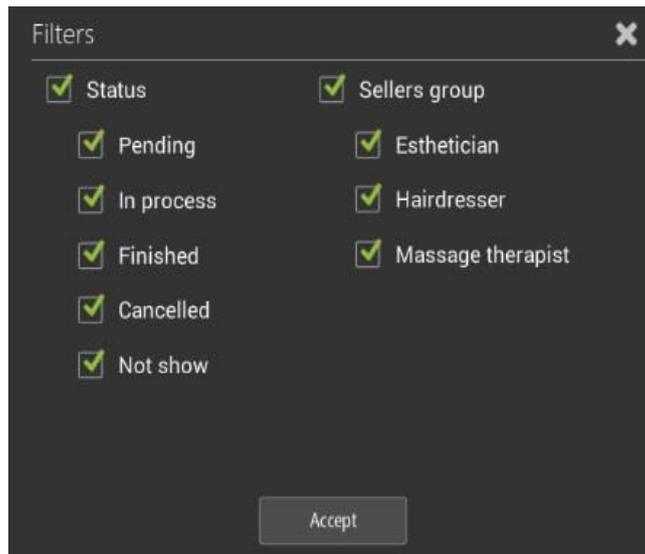
2.1.6.   Time zone configuration

With this option you can configure the time slot of the calendar and you can choose to view it between every 5, 10, 15, 20, 30, 45, 60, 90 and 120 minutes.
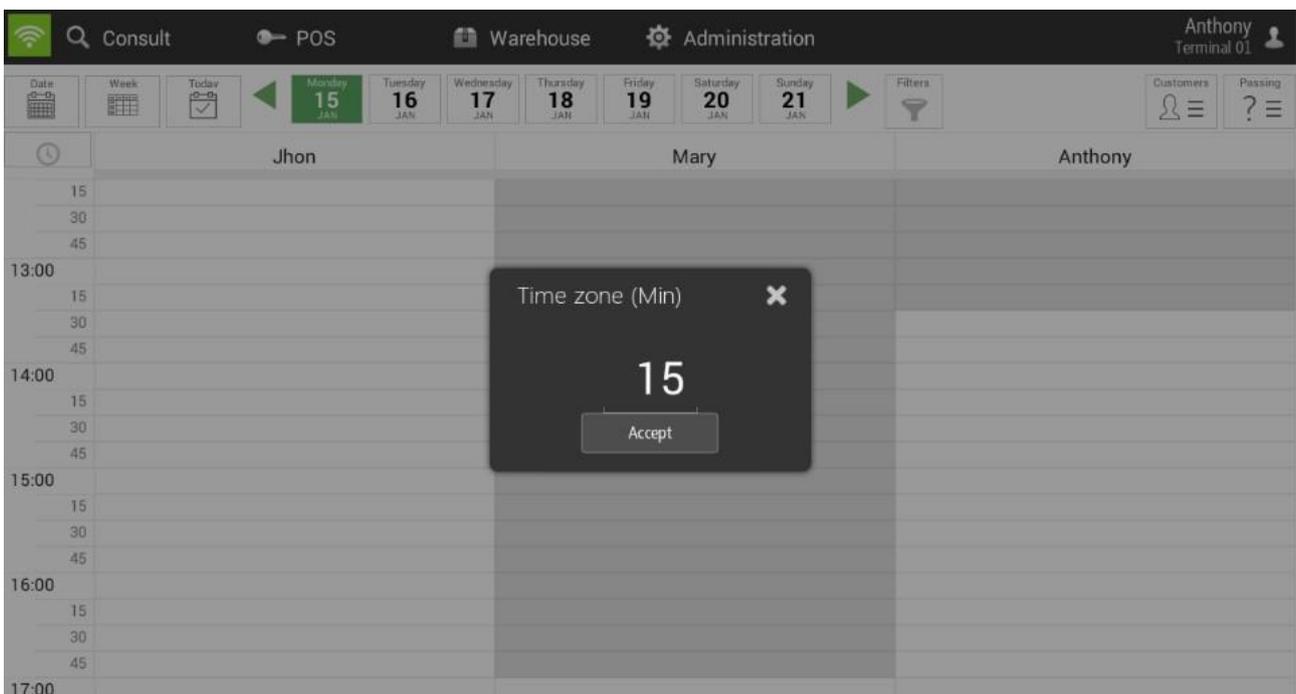
2.1.7.   Customers

This button is one of the options that the program has to start planning a service.

By clicking on this button, the screen of the already created clients will open, as you can also access to create one again by selecting *New*. You can search among the different clients created by Phone Number, FID, Name or Email.
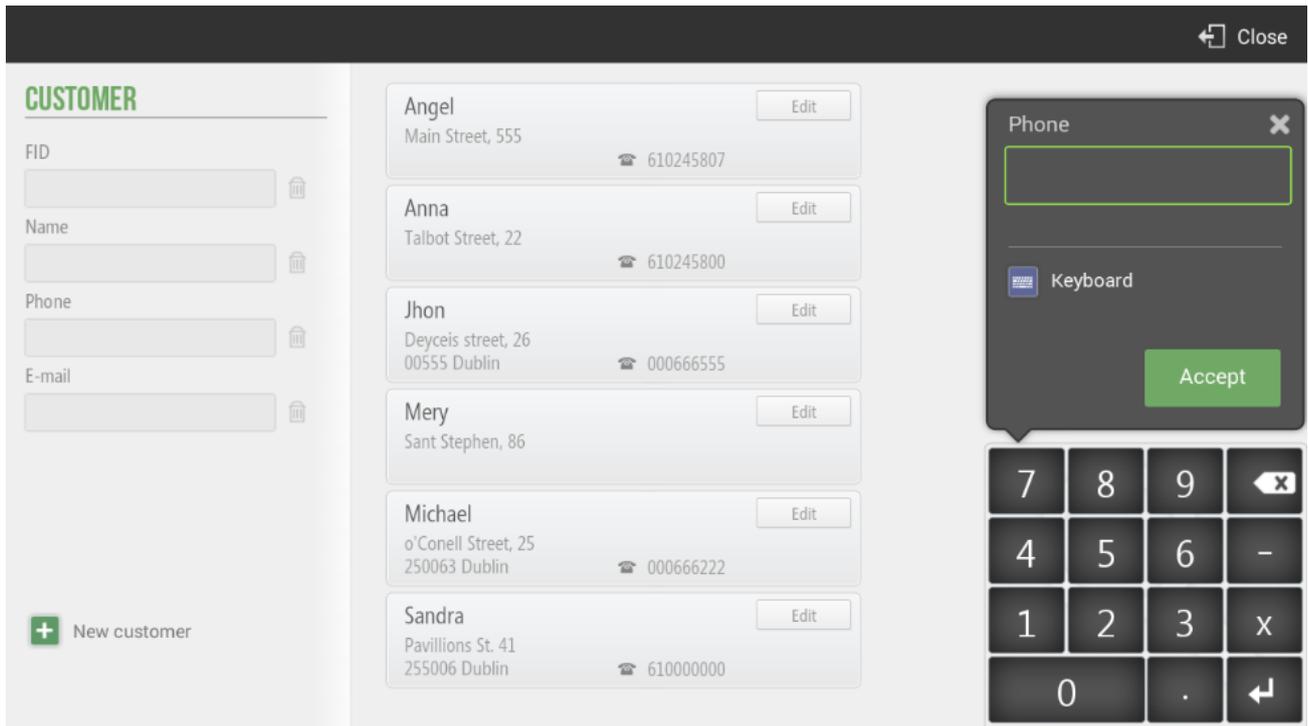
2.1.8. Sales screen of items and/or services

On the left side of the sales screen, you first find the customer file where you can see three different modules:

− Customer history: you will find the services performed by the customer beforehand, as well as the products purchased. We will see the number of times performed each service, the name of the service, the amount of the service (although the price has changed over time, the last price will always appear) and the last day that service has been performed.

− Outstanding services of the client: the services to be performed will appear. You can see the time and day of the service, the name of the service and the employee who will perform it. When the service starts, it will have to be selected above *START* (it will always be linked to *Pending*), and the status will be automatically changed to in process. When it is finished, you will select on top of *On progress* and it will be automatically changed to *Finished* and will also be seen on the right margin ticket, therefore, this service will be available to be billed.

The same would happen with the other services pending to be carried out. In the following images, you can see the process:

–   Customer issues: you will see the appointments canceled or in which the client has not been presented, with the option to reschedule the appointment.

If you select a client that does not have any pending service, only the other two modules would appear: history and incidents.

On the other hand, families are shown with their respective articles and services. The order in which families and articles appear can be modified from the Items of Configuration option, making a long press on the family to change the order. If it were the case that a subfamily exists, a folder would appear next to the articles.

In the case that a service is selected, it will automatically redirect you to the calendar screen, waiting to select the time and the employee that you want to assign for that service.

In the event that this client has already performed a service in the establishment, automatically, it will appear yellow, which has been the last employee to serve this client.

2.1.8.1 Modifications to the ticket lines

You can make different modifications to each item you have added to the sale, just select the article or items of the ticket and you will see the available options:
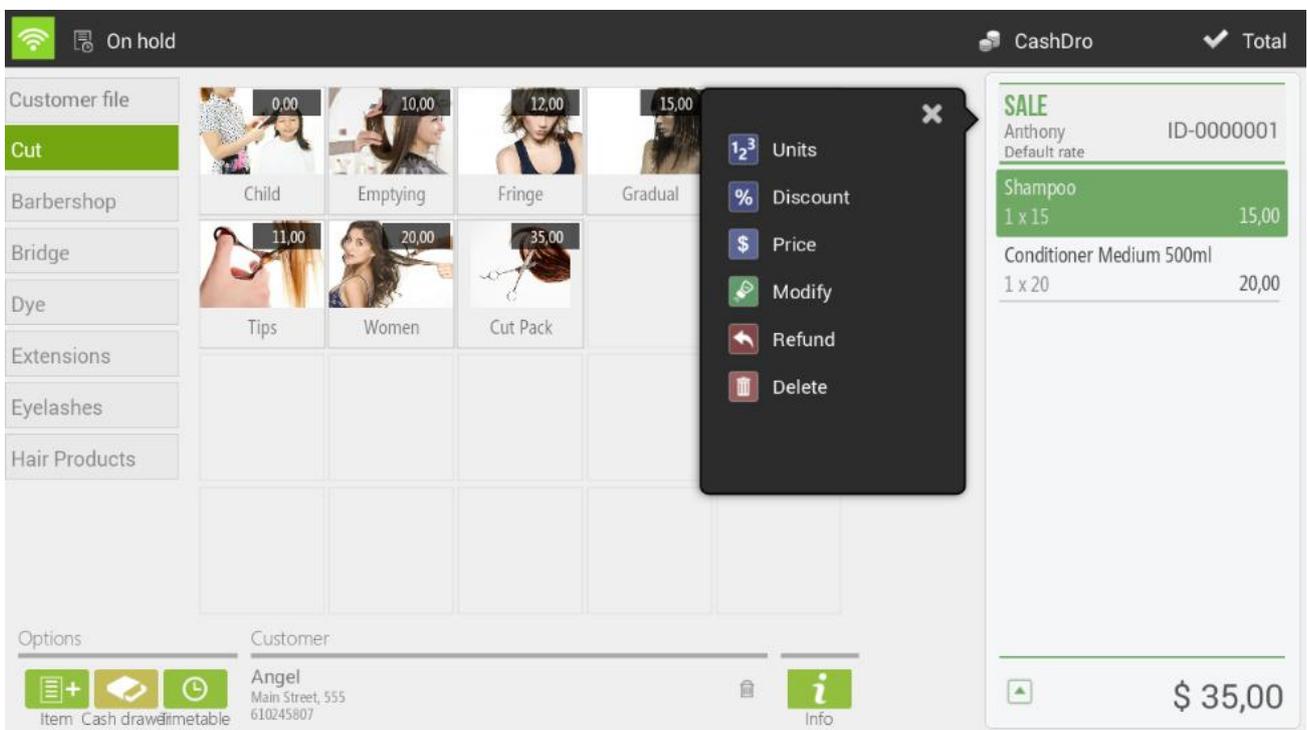
- <u>Units:</u> It allows modifying the units of the article that you select

- <u>Discount:</u> Allows you to assign a percentage discount to the selected articles

- <u>Price:</u> Allow to modify the price of the selected articles

- <u>Modify:</u> Allows you to add a modifier to the item selected. The modifiers have to be created in advance in the *Modifiers* section of the *Configuration*

- <u>Refund:</u> It allows refunding the selected articles. The selected item will appear as a negative line for the amount of the item

- <u>Delete:</u> Remove the item from the ticket sale

If you click on the top part of the ticket, it shows a drop down with the options you have to modify the ticket as a whole:
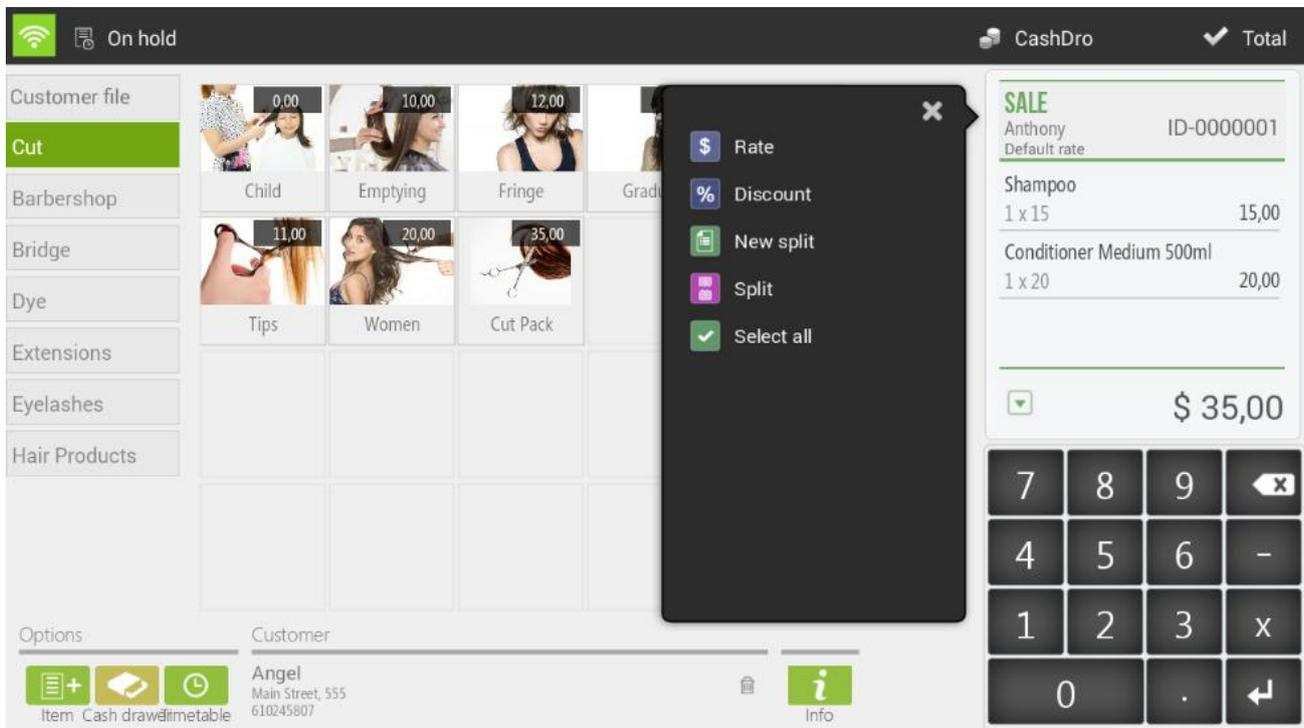
- Rate: It allow changing the price rate that is being applied to the ticket
- Discount: Apply a percentage discount on the total sale.
- New split: Create a second ticket within the same sell, allowing you to finalize two tickets at a time and charge separately.
- Split: It allows you to divide the sale into two or more sales. Any item can be transferred from one ticket to another, just drag it.
- Select all: select all the items of the sale.

Also in the lower part of the screen there is an information button, which advice you of comments about the client, specified in the observations field that you can found it in *Configuration*, *Clients*.

Other options available on this screen are direct search for items, open the drawer and go directly to the calendar screen, as shown in the following image:

Finally, there is also the option to change the client by selecting and easily visualize the card of this one. In the case that services or articles have been previously selected and you want to change the client, they will remain to the client that has been previously associated with them.
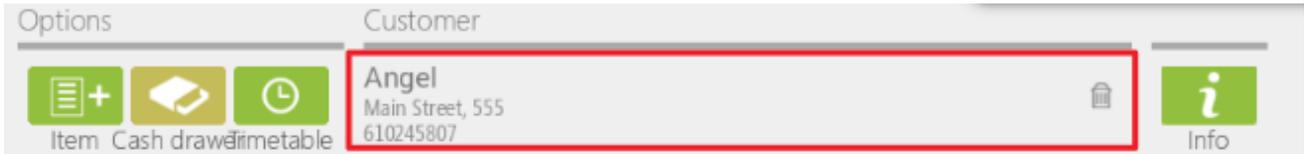
2.1.9. Establish a service

In relation to the Customers point, another of the options available to the program to start planning a new service is selecting a box of the calendar (taking into account the time and the employee).
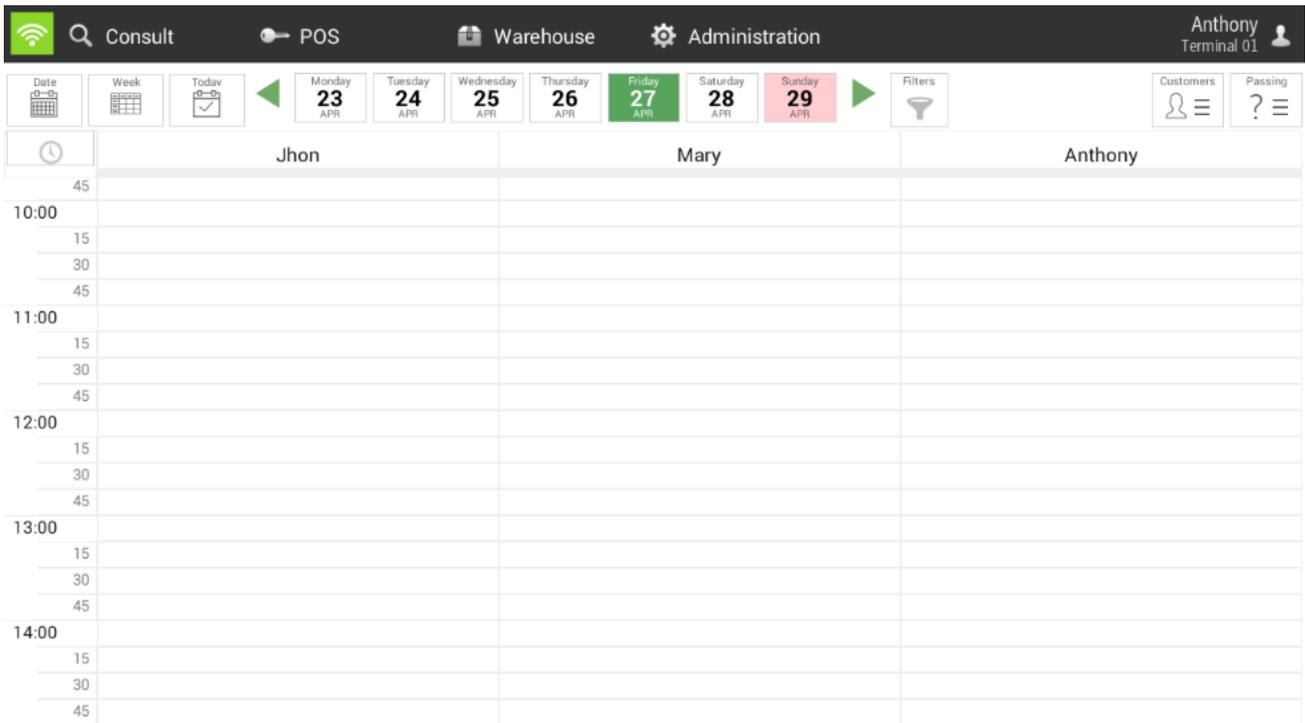
Once selecting New Service, the operation is the same as in the Customers point, the only difference is that by previously selecting the time and the employee, the service chosen will automatically place you in the selected box.

2.1.10. Passing customer

From the calendar screen, there is the option to access to make a sale of a client that you do not have registered and who may be a non-regular customer. This option is called *"Passing"*, in the upper right margin, where selecting there will direct us to the sales screen (item / service grid).

Then, if you select an item, it will go directly to the ticket; whereas if you select a service, in the case that you do not work with a group of sellers, you will have to choose the vendor that will perform the service.
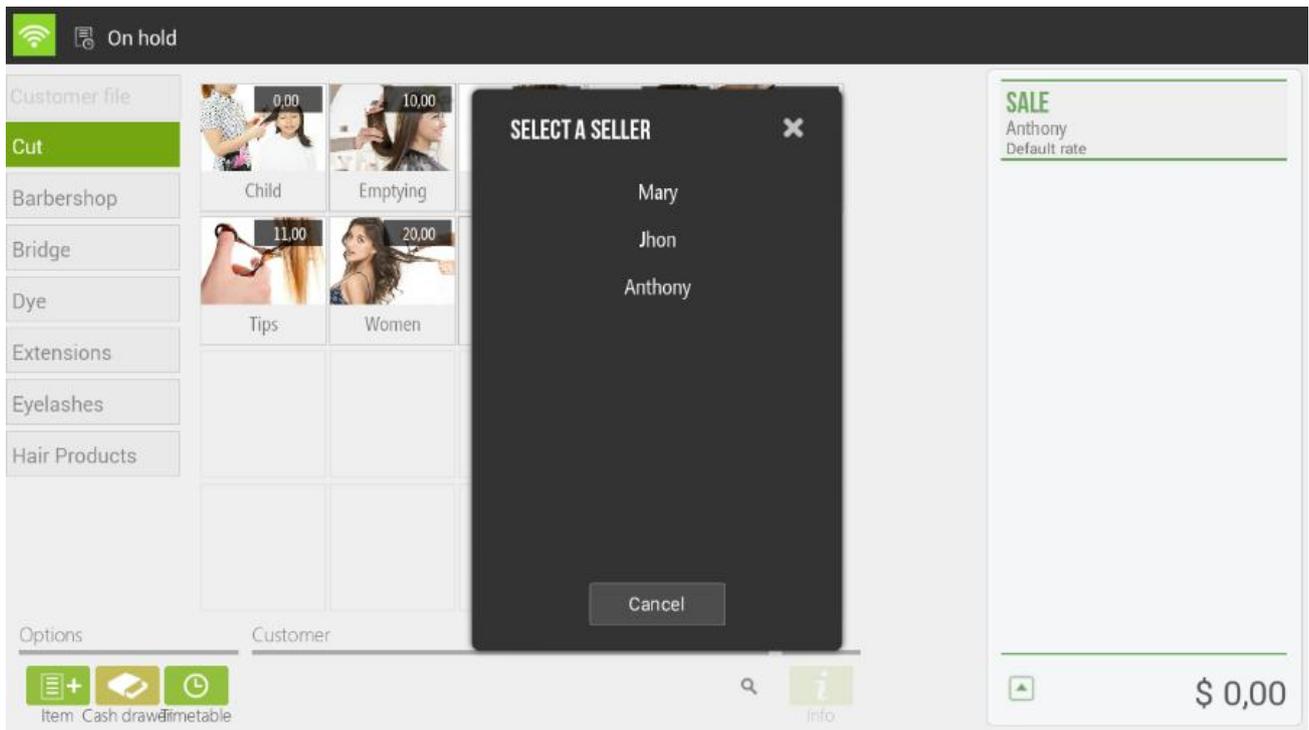
The sale for a customer *Passing*, it is as if it were a direct sale to select the items and bill them at the time, since it is not scheduled. The option of *Customer Card* will be inactive.

2.1.11. Service status

In the calendar screen you have 6 states of services, each one with its different options:

2.1.11.1 Pendant status (Blue)

This status indicates that this service is still pending. If you click on the service continuously the following options appear:
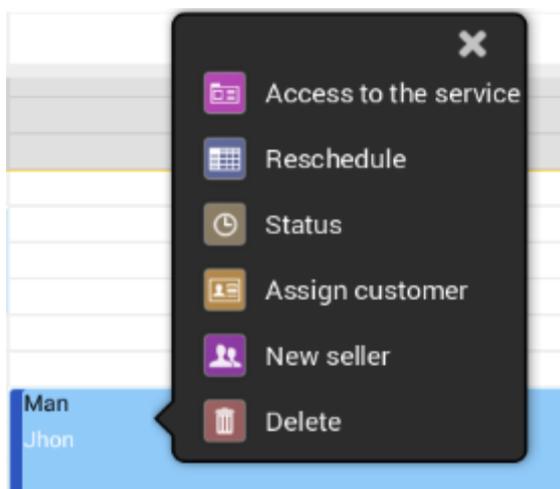
– <u>Access the service</u>: This option allows us to directly access the client's file.
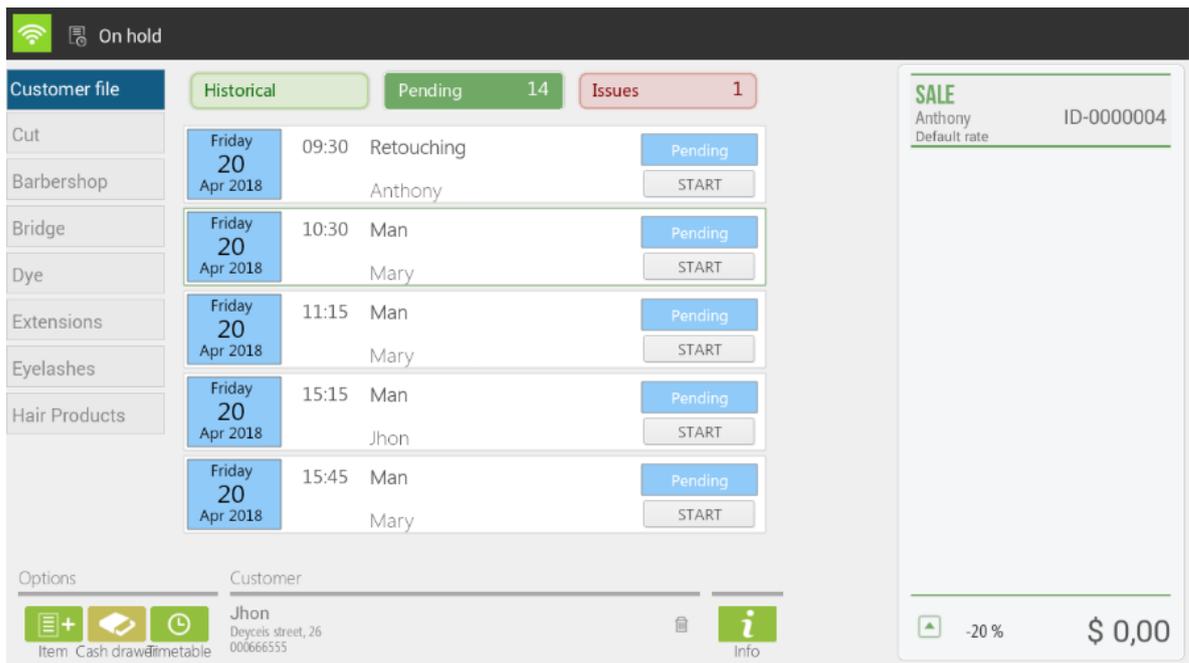
– <u>Reschedule</u>: a pop-up of the selected service appears, offering the possibility of changing the time and / or the vendor. You can also make this change by sliding the Pop-up to a box, as shown below:
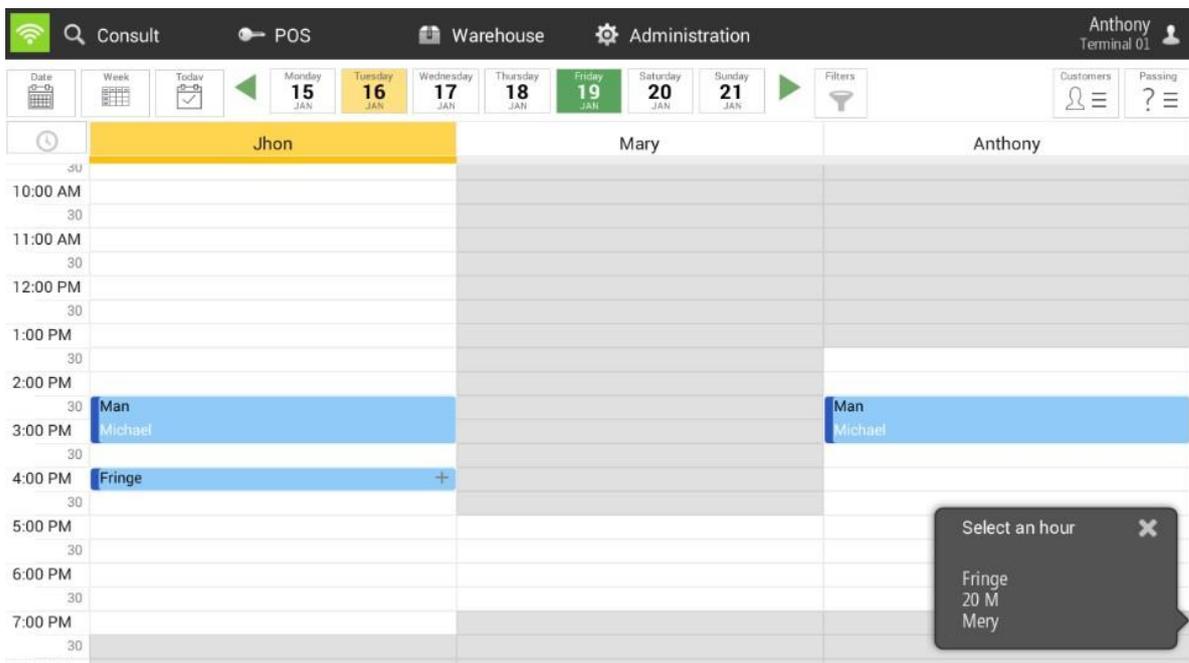
The replanting option can also be done directly by moving the service from one box to another.

- – <u>Status</u>: allows you to change the service status manually.
- – <u>Assign client</u>: allows associating the service with another client.
- – <u>New seller</u>: A Pop-up appears that allows you to change the seller.
- – <u>Delete</u>: delete the planned service.

2.1.11.2 In process status (Yellow)

This status indicates that the service is being performed. If you click on the service continuously the following options appear:
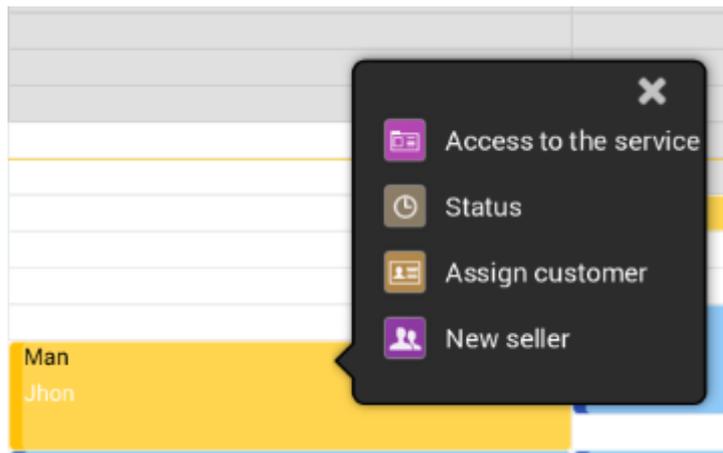
- – <u>Access the service</u>: This option allows us to directly access the client's file.
- – <u>Status</u>: allows you to change the service status manually.
- – <u>Assign</u> client: allows associating the service with another client.
- – <u>New seller</u>: Pop-up appears that allows you to change the seller.
- – <u>Delete</u>: delete the planned service.

2.1.11.3 Finalized without invoicing status (Light green)

This status indicates that the service has been completed but has not yet been charged. If you click on the service continuously the following option appears:
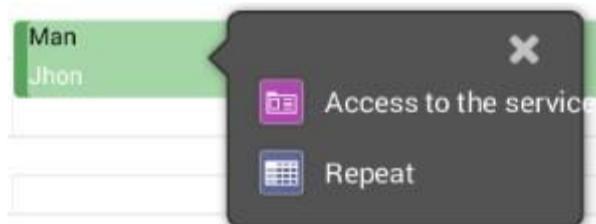
- <u>Access the service</u>: This option allows us to directly access to the client's file.
- <u>Repeat</u>: A Pop-up of the selected service appears offering for the same client the possibility of repeating the service by selecting a time and a vendor.

2.1.11.4 Finalized and invoiced statuses (Dark green)

This status indicates us that the service has been completed and has already been charged. If you click on the service continuously the following option appears:
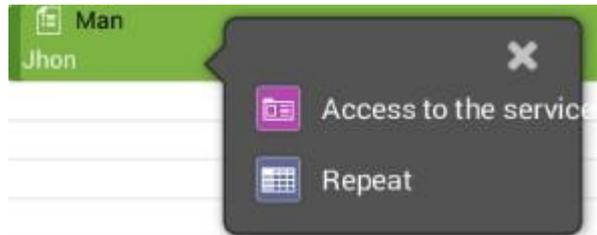
- <u>Access the service</u>: This option allows us to directly access to the client's file.
- <u>Repeat</u>: A Pop-up of the selected service appears offering for the same client the possibility of repeating the service by selecting a time and a vendor.

2.1.11.5 Canceled status (Red)

This status indicates that the service has been canceled. If you click on the service continuously the following options appear:
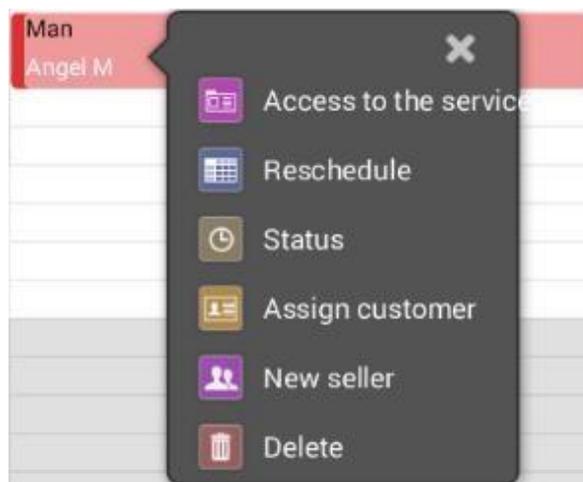
- <u>Access the service</u>: This option allows us to directly access to the client's file.
- <u>Reschedule</u>: a pop-up of the selected service appears, offering the possibility of changing the hour and / or vendor time. You can also make this change by sliding the Pop-up to a box, as shown below:

The re-planning option can also be done directly by moving the service from one box to another.

- Status: allows you to change the service status manually.
- Assign client: allows associating the service with another client.
- New seller: a pop-up appears that allows you to change the seller.
- Delete: delete the planned service.

2.1.11.6 Not shown (Dark gray)

This status indicates that the client has not shown up to perform the service. If you click on the service continuously the following options appear:
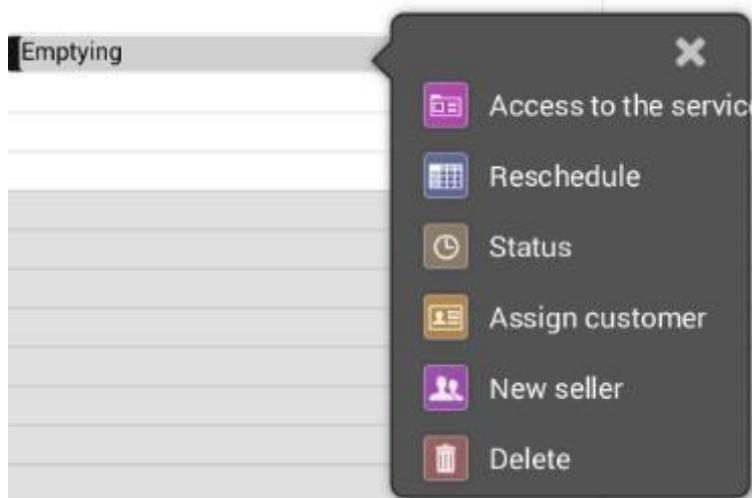
–

- Access the service: This option allows us to directly access to the client's file.
- Reschedule: a pop-up of the selected service appears, offering the possibility of changing the hour and / or vendor time. You can also make this change by sliding the Pop-up to a box, as shown below:
 - o The re-planning option can also be done directly by moving the service from one box to another.
- Status: allows you to change the service status manually.
- Assign client: allows associating the service with another client.
- New seller: a pop-up appears that allows you to change the seller.
- Delete: delete the planned service.

2.1.12. Change time/vendor of a service

If you want to change the time or the seller of a service, there are two different ways to do it:

1. Keeping the service pressed and sliding it to another box.

2. As previously mentioned, there is the option of doing so through the *Reschedule* button of those states that allow it (pending, canceled and not presented).

You can also move a service to the same time and to the same vendor as another service already scheduled.

2.2. Service payment

2.2.1. Sale in Cash

HioPOS Cloud includes a fast medium for those sales that are made in cash. This feature does not have to select the type of payment and prints the ticket automatically.

- First, select the items to sell.
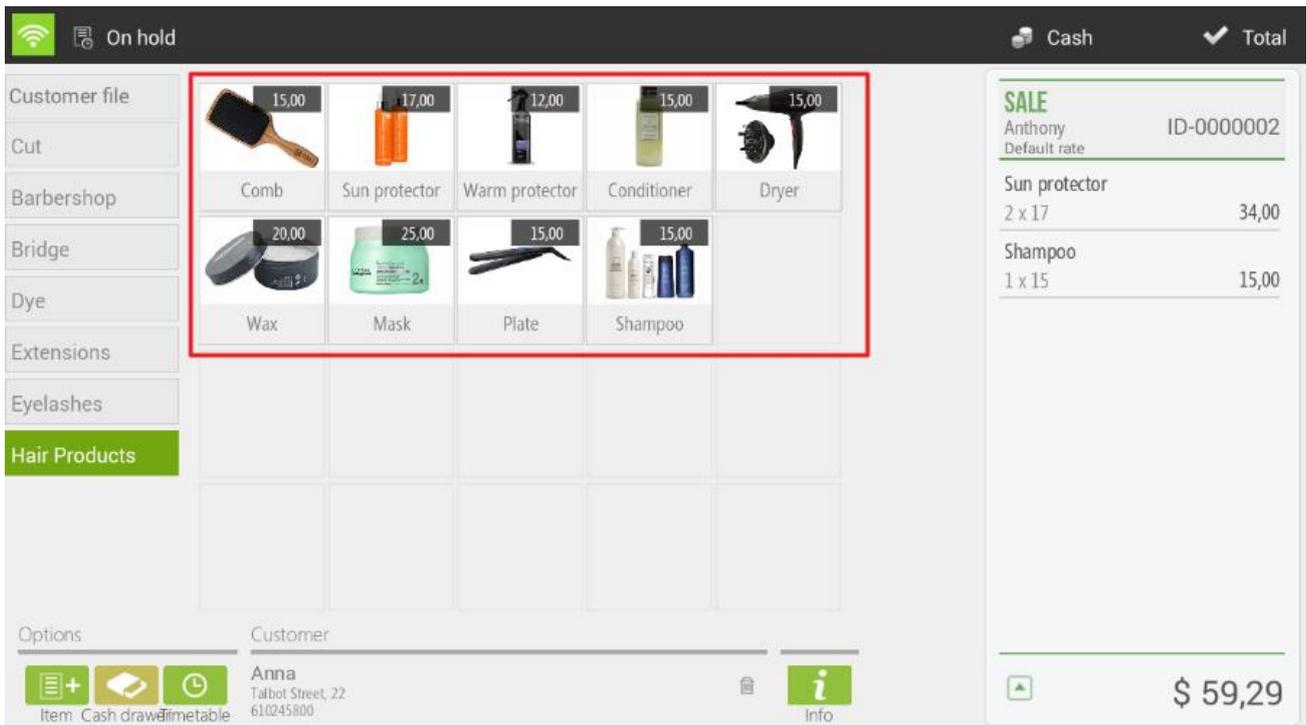
- When the items are in the ticket, in the top menu will appear the *Cash* button, select it and enter the amount that the customer gives the cashier and HioPOS Cloud will show directly the change to return.

- Press on *Accept* to finalize the sale and print the ticket.
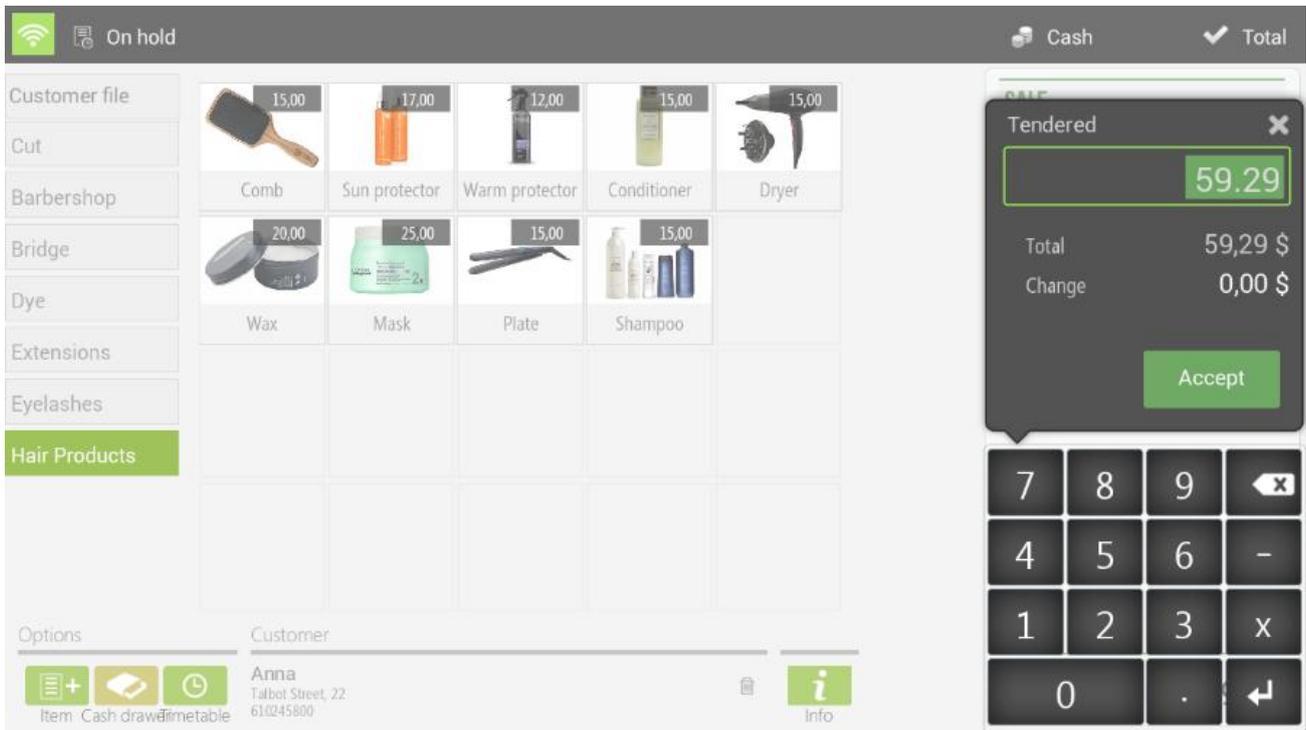
2.2.2.   The sale with different types of payment

If you work with different types of payment you can select any of the ones you have available before finalizing the sale.

First, select the items to sell and press *Total.*
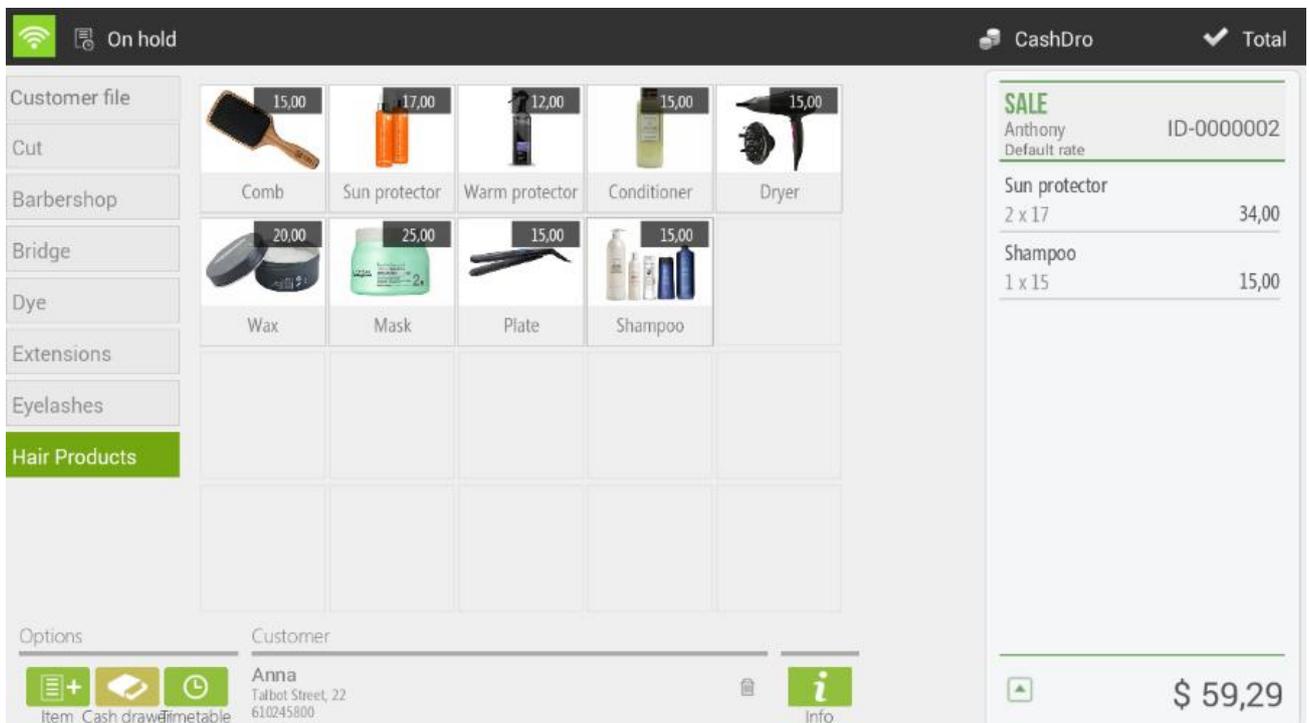
HioPOS Cloud already automatically displays the available types of payment. Select the one you want to use, as well as the quantity delivered.

To end the sale, press *Do not print or Print*, depending on whether you want to print the ticket or not.

The *Do not print* button will be visible if the option is enabled in *Settings, Terminal type*.

2.3. Discount

2.3.1.   Discount reasons

The discount reasons are necessary to make a discount on the total. To create or modify a discount reason we have to go to *Settings* and select the *Discount Reasons*.

Within the discount menu you can modify the name and select the maximum and minimum percentage that the cashier will have to maneuver.

You can determinate the discount percentage is not changeable, so each time the discount is selected this will apply a discount for the value of the *Maximum percentage* over the total.

You can also set the discount reasons so that these are applied by amount, at the time of selecting this option, you will have to report a *Minimum amount* and a *Maximum amount*. Then the discount reasons by amount screen is attached.

2.3.2. Example Discount Reason: Internal Consumption

Exist multiples possibilities to create reasons for discounts; commercial discount, discount for customer loyalty, discount for early payment... In our case, the configuration of the discount for internal consumption of articles will be explained below.

In *Settings*, *Discount Reason*, you can create the discount. At the time of creating the Discount Reason the application will ask you for certain information; a name; If it is a discount by amount or a percentage discount; If it is a discount that you can modify and if you want the tax description is printed on the ticket of the sale.

To apply the discount for Internal Consumption (100% discount) you will have to place, at the time of making a sale, in the line of Sale of the application.

You will select to display the menu of options and you will choose the option Discount. Will ask you to apply one of the discount reasons that you have configured, you will select Internal Consumption.

At this time, HioPOS cloud will generate an Invitation, with the total price discounted.

The user can always consult the total of the internal consumption by retrieving the data in the *Query*, *Sales* section and selecting the Invitations filter in the lower right margin. In this way, invitations generated during a certain period of time can be consulted.

Provided that in the configuration screen of the Internal Consumption Discount Reason, the option was selected; *The description is printed on the ticket,* the Invitation will contain the Name of the Discount, being able to speed up the visualization of the Internal Consumption within the totality of Invitations.

2.3.3. Ticket discount

You can select this type of discount by clicking on the header of the ticket on the sale screen or by clicking on the ticket on the screen of the means of payment.

The discount on the total will always imply assigning a discount reason, having to select one from the list of existing discount reasons. Once selected the reason for discount you enter the amount, in percentage, to discount and press accept.

To apply a new discount will be necessary to remove the current discount, click on the ticket header (or on the ticket, depending on the screen) and select Remove discount. Now you can apply a new discount.
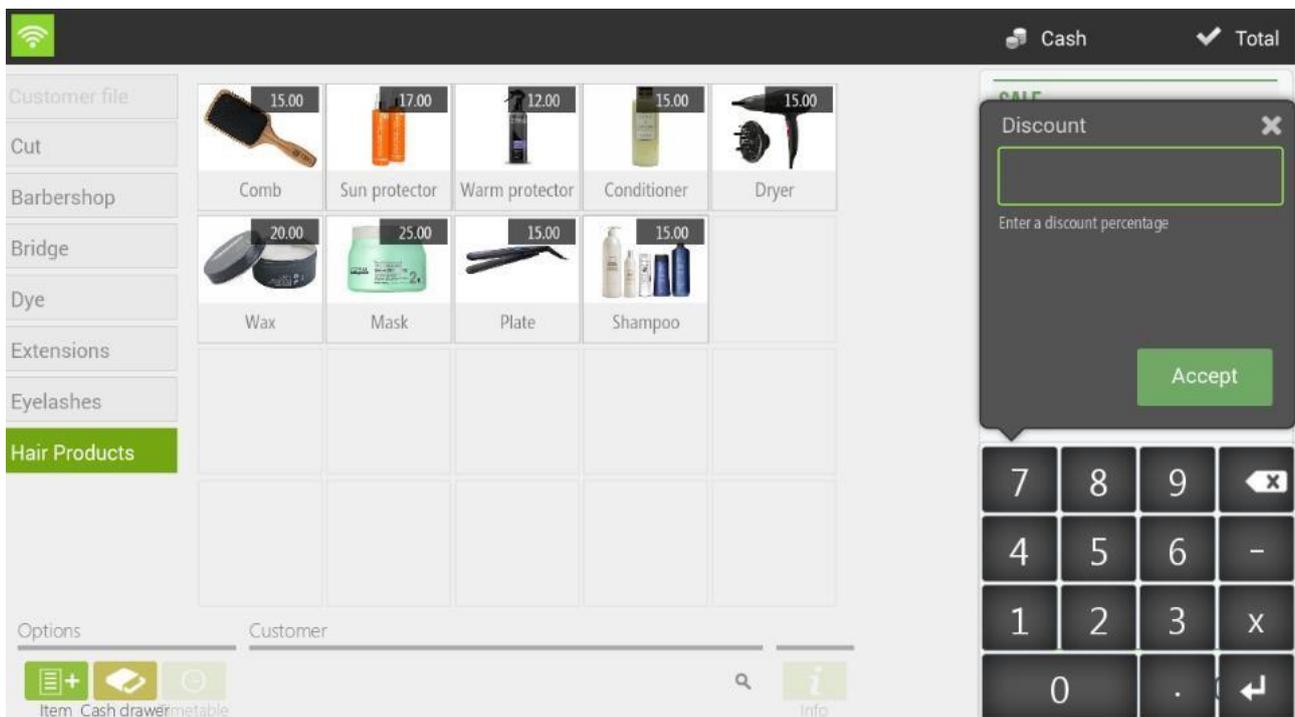
2.3.4. Product discount

The discount on the product is applied by sales lines. To make a discount on one or multiple products first you will select them from the ticket and the drop down click on the option *Discount*.
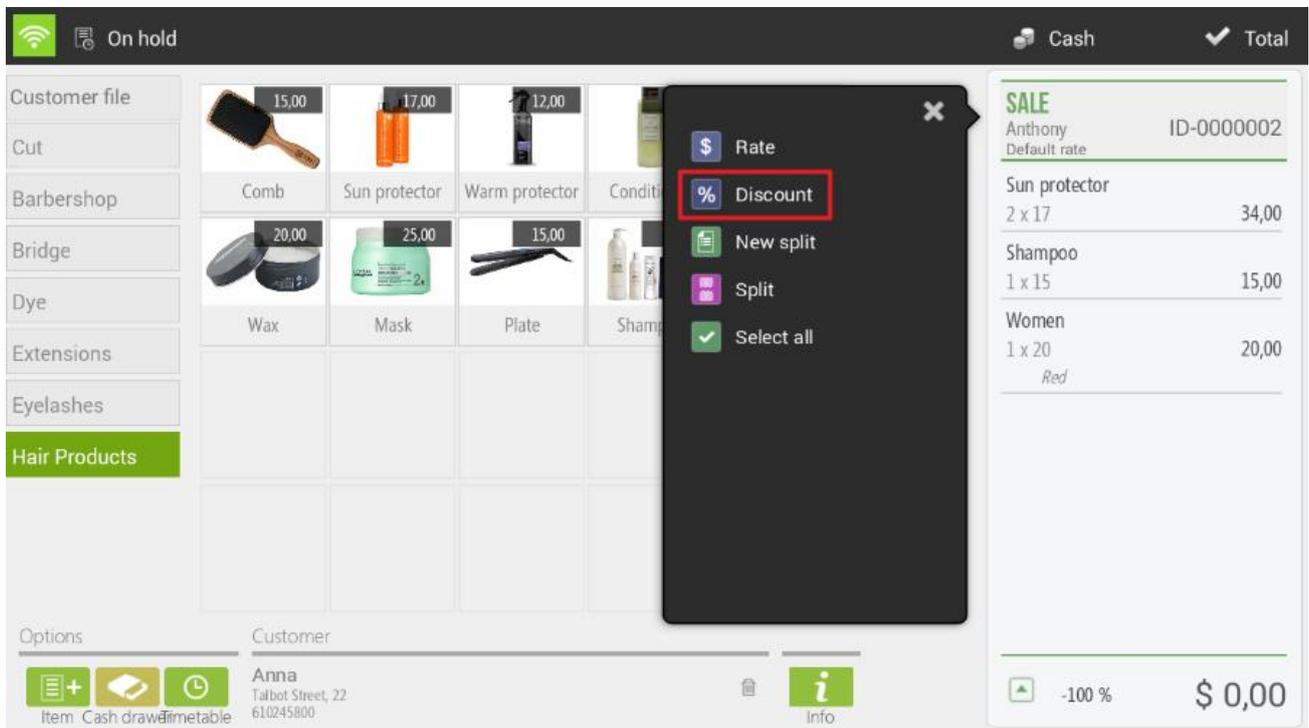
The *Discount* function allows you to apply a reduction on the price of the item in percentage. Once you have entered the discount you click *OK*.

2.4. Client

You can consult, modify or create new clients in the *Customers* section within *Configuration*.

Press the *New* customer button in the bottom left of the screen to create the new customer tab.
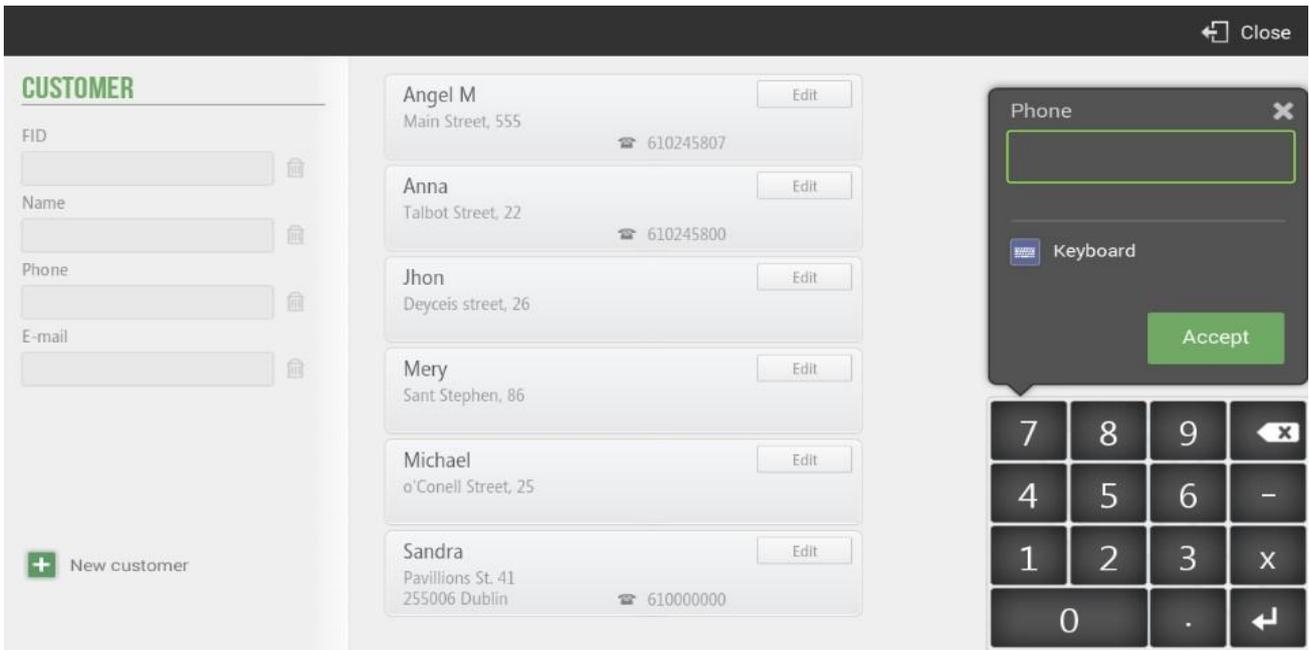
For each client you can put all your personal data and select the options *Generate invoice, Send document by e-mail, Send service confirmation and Invoice without taxes.*
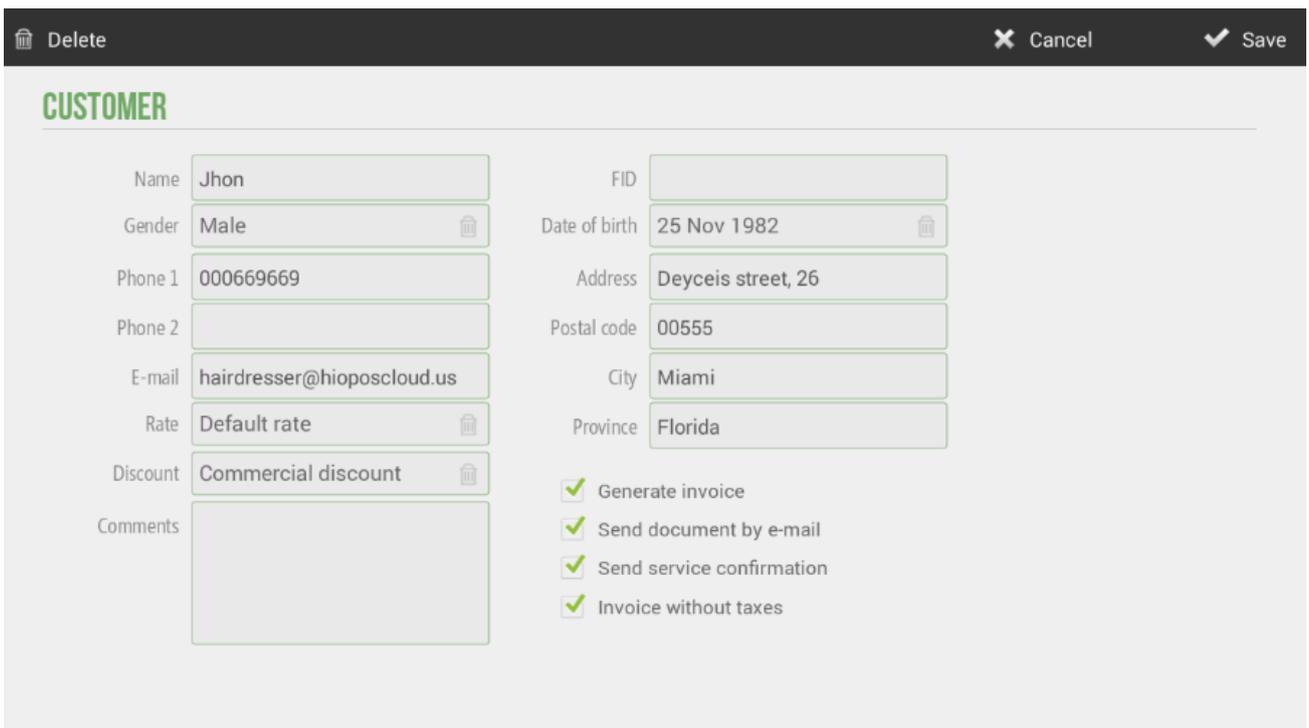
2.4.1. Send appointment confirmation by email

When you establish an email in the client file, and pick the *Send service confirmation* option, the client will receive automatically an appointment confirmation in her mail.
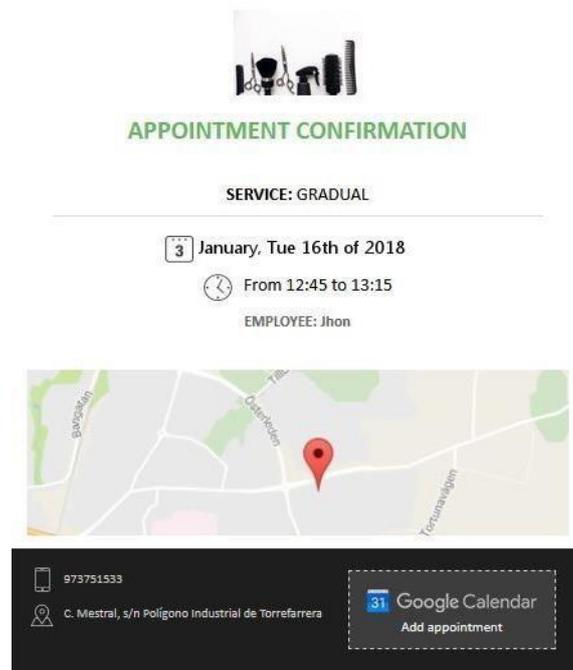
This indicates the person to whom the appointment is addressed, the service, the date of the appointment, how long the service lasts, the employee, the location using Google Maps, the details of the establishment and the option to add the appointment in your Google Calendar and synchronize it with the Calendar of your Smartphone.

To schedule our appointment in the Google Calendar you have to select *Add Appointments* in the email and it will automatically be updated.
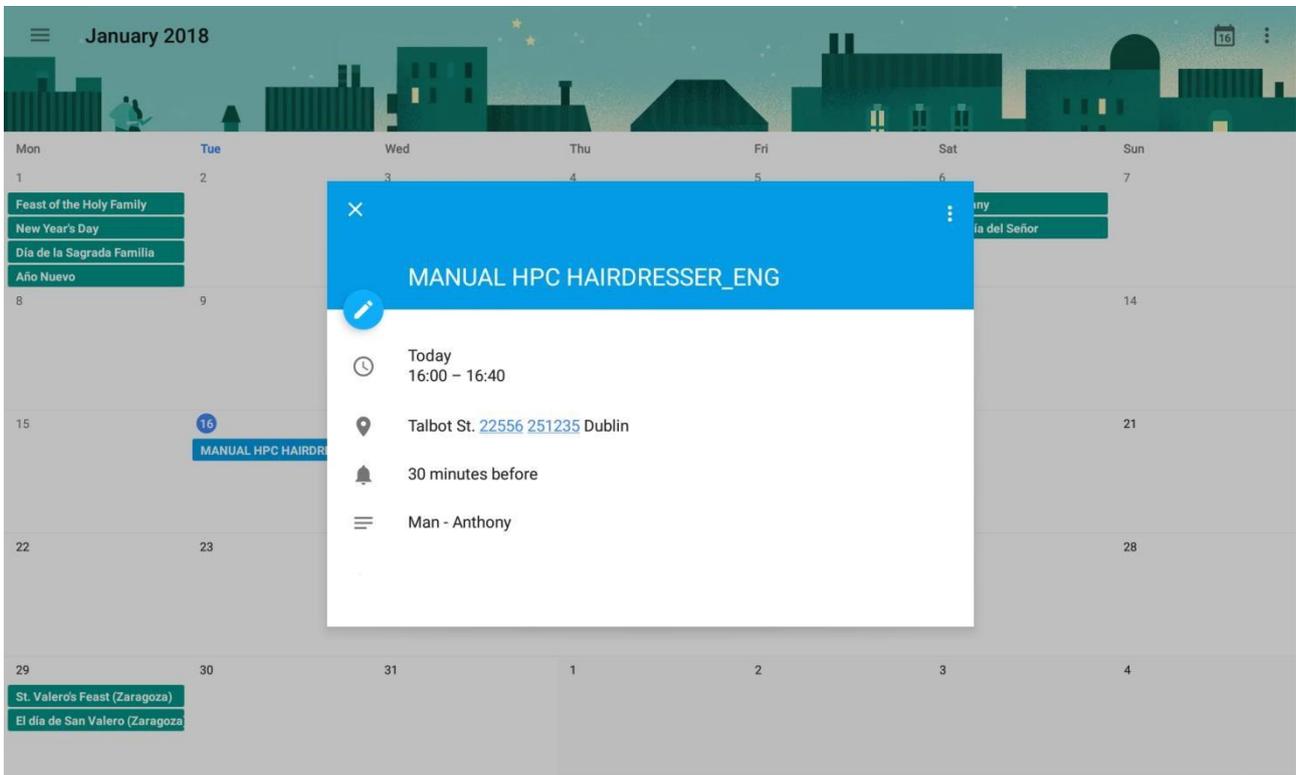
2.4.2. Send documents via email

HioPOS Cloud can send invoices and tickets by email to the client. For this, you must have assigned to the client a valid email address, and check the box *Send document by email*.

If you have activated the *Send document by email* option, each time you make a sale that is assigned to the client, it will be sent from *no-reply@hiopos.com* to the customer's email.

2.4.3. Generate invoices

In the same screen of modification of the customer data, we can activate the option *Generate invoice*, so every time you make a sale to this client, a document of type invoice will be generated instead of a ticket.

Note: HioPOS Cloud uses a different numbering for ticket type documents, for invoice type documents and for ticket and invoice payment documents. You can set the series of each type of document for each terminal in the *Terminal* section of the *Settings*.
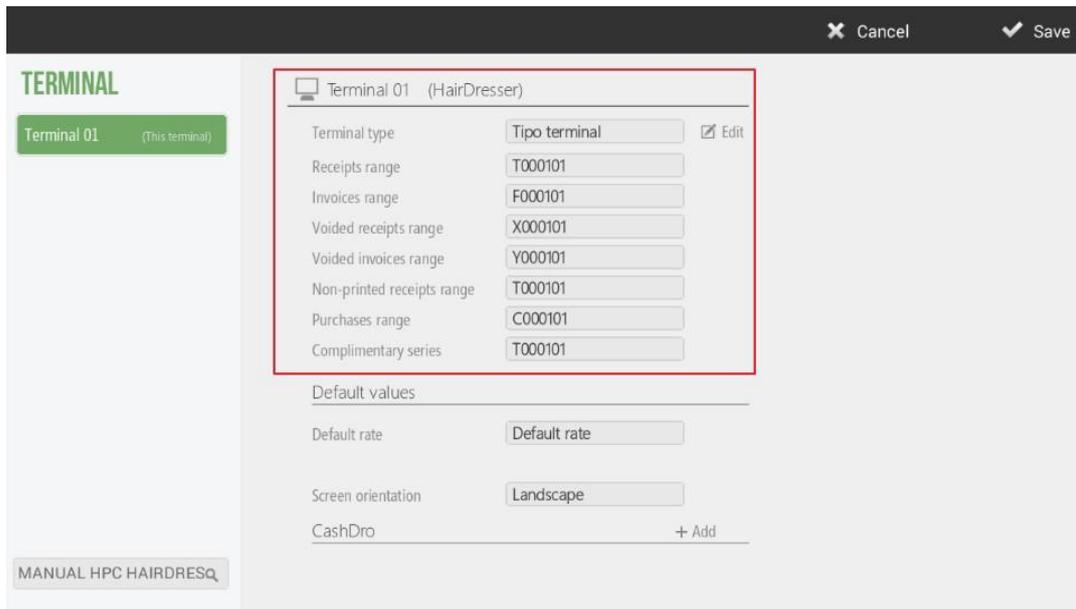
2.5. Pending sales

HioPOS Cloud allows at the time of totalizing a sale, select the types of payment *Pending*. In these cases, it will always be mandatory to assign the sale to a customer so that the collection can be followed.
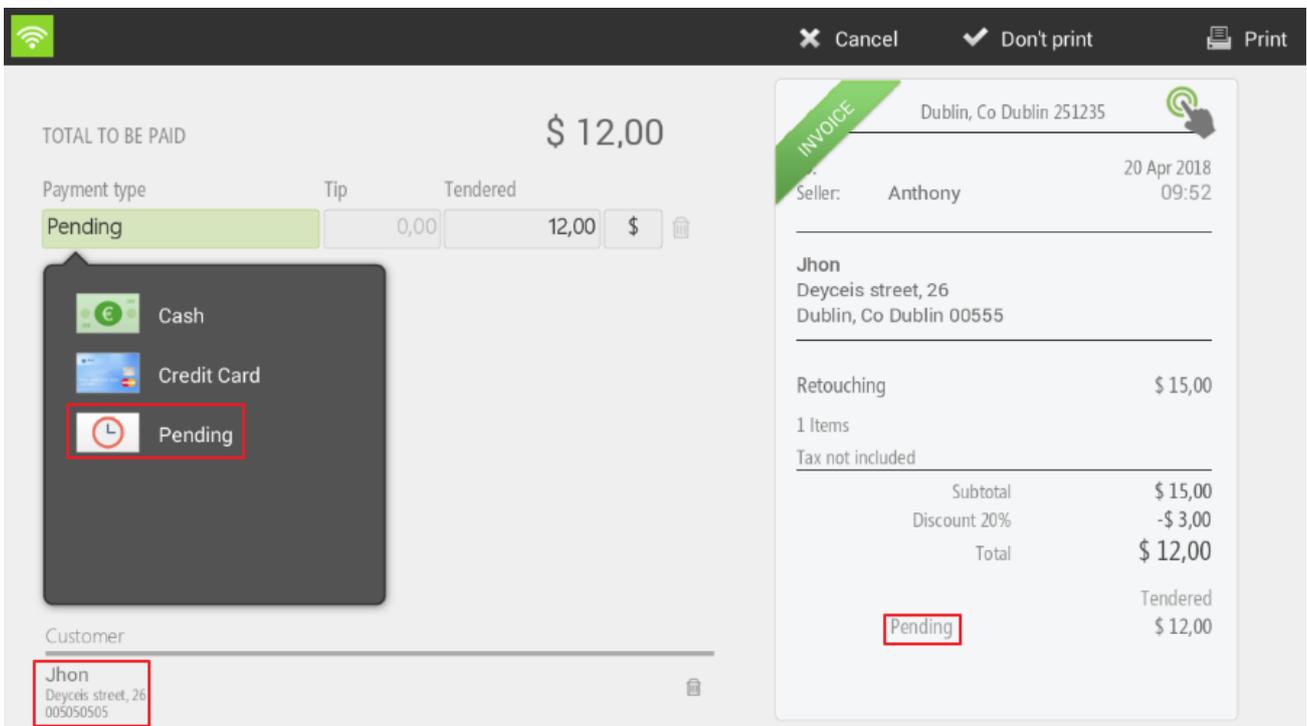
For the management of outstanding charges, HioPOS has a couple of possibilities. The first is to consult customers who have pending charges and the second, to consult in statistics, the report of collections pending settlement.

To visualize those customers who have outstanding charges you will have to go to Cash Flow, Pending and select the client that the user wants. To streamline the customer search, HioPOS Cloud offers the possibility to search by phone number.

In this screen you can see the numbers of Invoices pending collection, the pending amount of the invoice and the amount to be paid. You will also be able to check all of the outstanding amounts and the client's preferred payment method. The field Comment, specially designed for the management of the client and to give complementary information that can be very useful in future operations, is observed in the right margin of the screen.

The second option for controlling the pending is through the pending report. The user can consult this information from *Administration*, *Statistics*, *Audit*, and *pending collections*.

In this screen of pending collections by the customer, the user can filter according to *store*, *POS* and *Cash count*. You will show the pending charges per customer using a four-column table with the fields; Customer name, total amount pending, % that this total means in reference to all pending customers and graphic weight that this client means in reference to the whole.

2.6. Sales on hold

If you are in the process of making a sale, with items already on the ticket, and you want to leave it on hold to return to it later, you have to click on the button *On Hold* that is in the upper left margin of the screen.

2.7. Split a sale

The fraction of a sale is used to divide a ticket among several customers.

2.7.1. Split an existing sale

Split a sale will allow you to divide a ticket into two or more parts, in order to be able to separately charge multiple diners.

There are three points in the sale process in which the cashier can split the sale:

1. The first one is when you click on the ticket header and then select
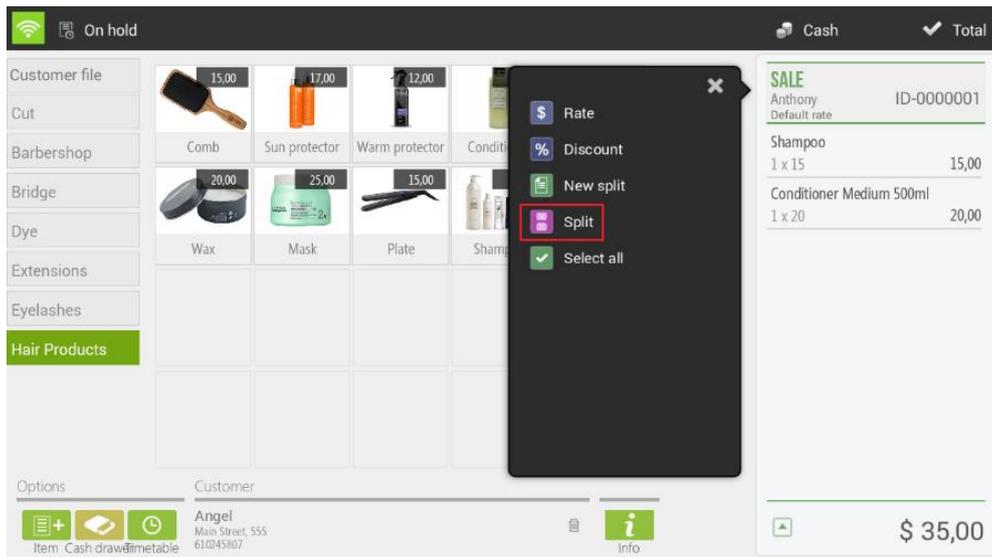
2. The second one is once we are in the selection screen of the payment means when clicking on the ticket and selecting Fraction.
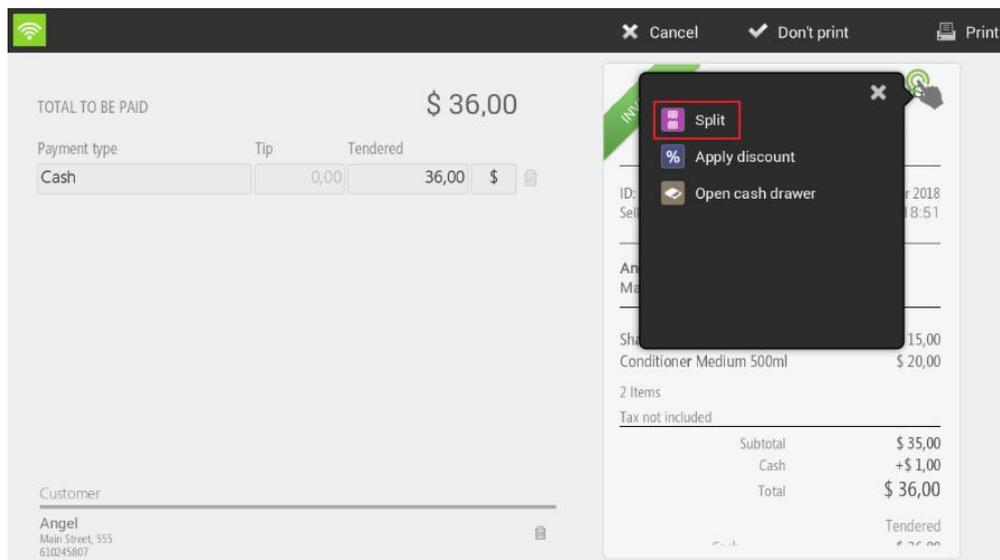
The result will be the same regardless of where you select. Selecting *Split* the program shows two tickets on the screen, the current and the second ticket with which you want to do the split. To move an article from one ticket to another simply drag them with your finger from one to another or select above the item that you want to split.
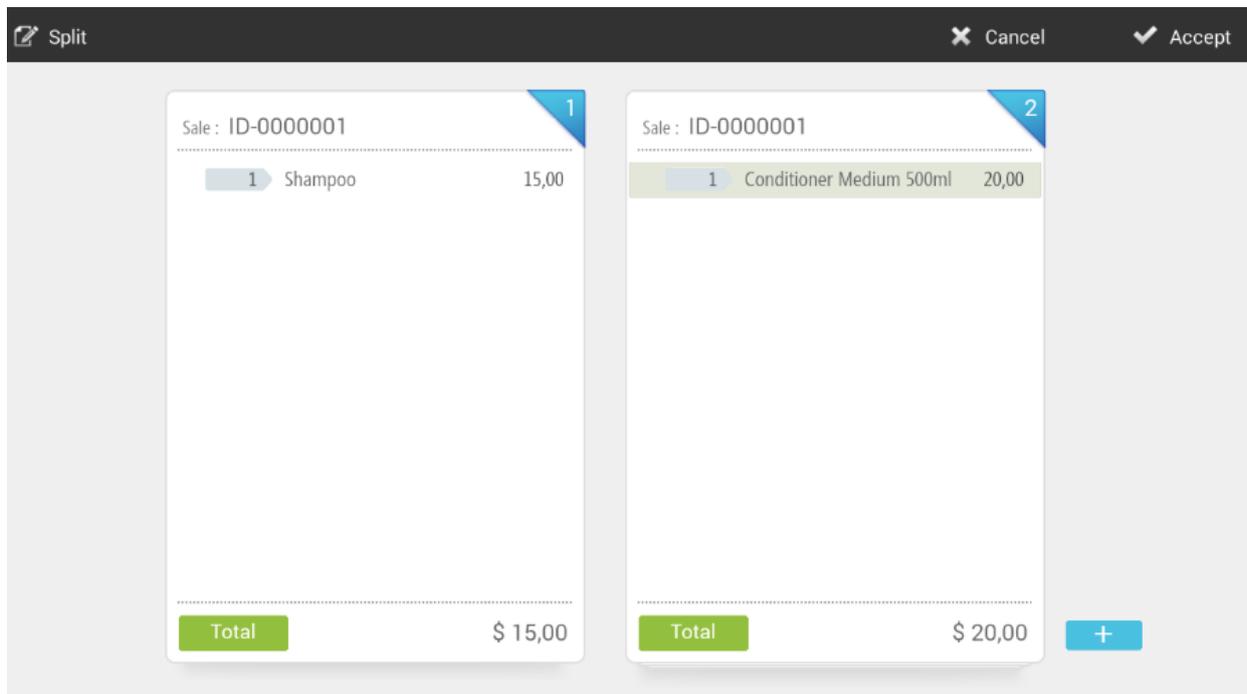
You can also divide an Item and show it by the value of the division in the tickets you want. Simply press two seconds on the top of the article and select *Divide*
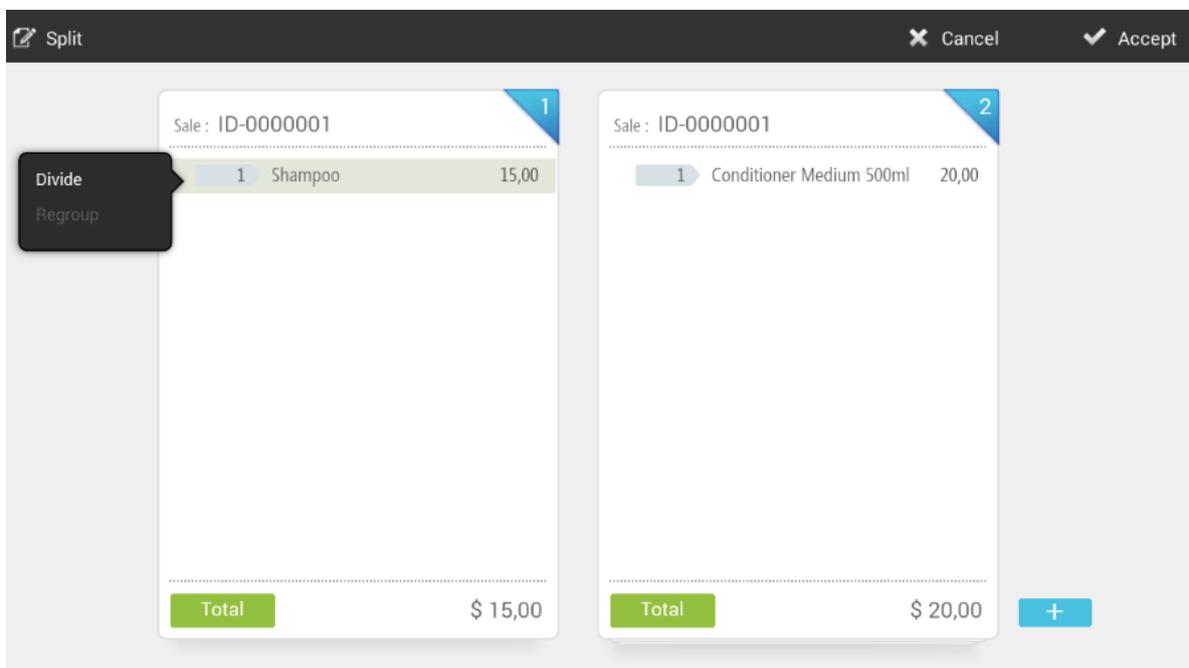
For each division to move from one ticket to another, click on the item that was created at the beginning of the article line.
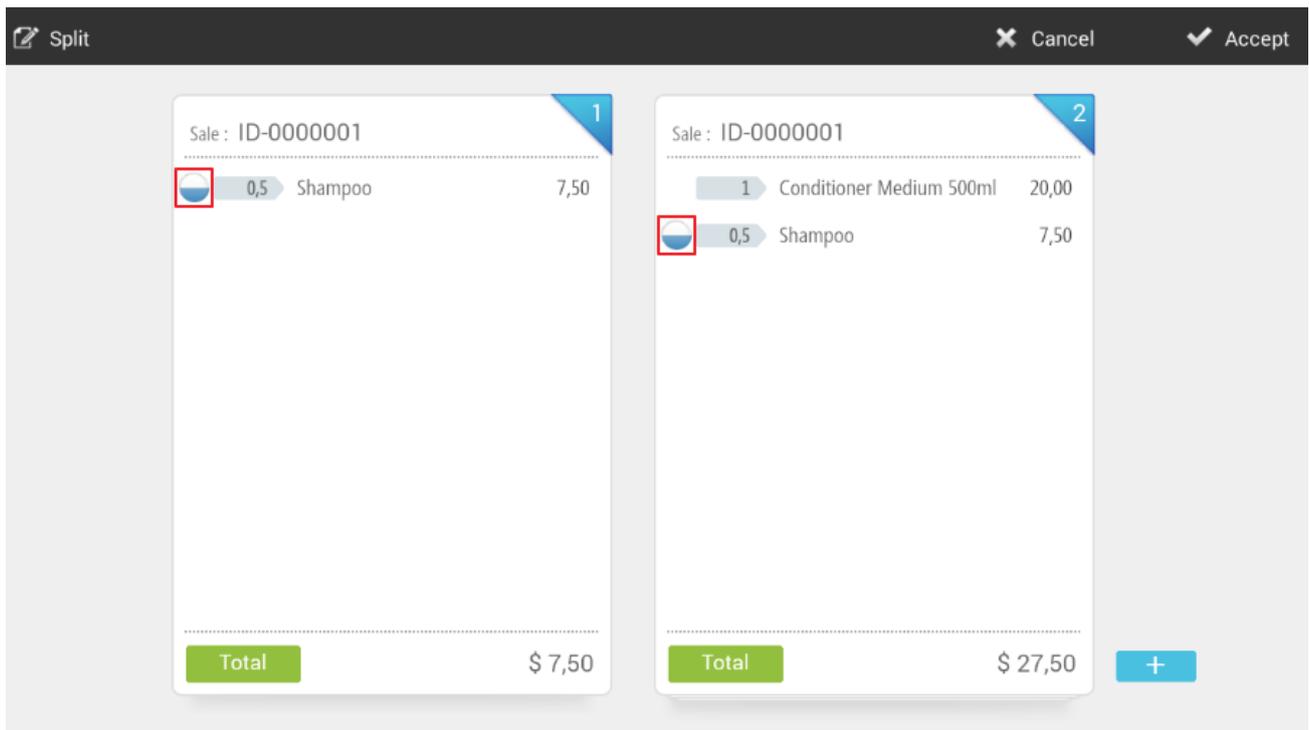
If you are working with split sales, you can display the various tickets by using the arrows that are added to the ticket header.
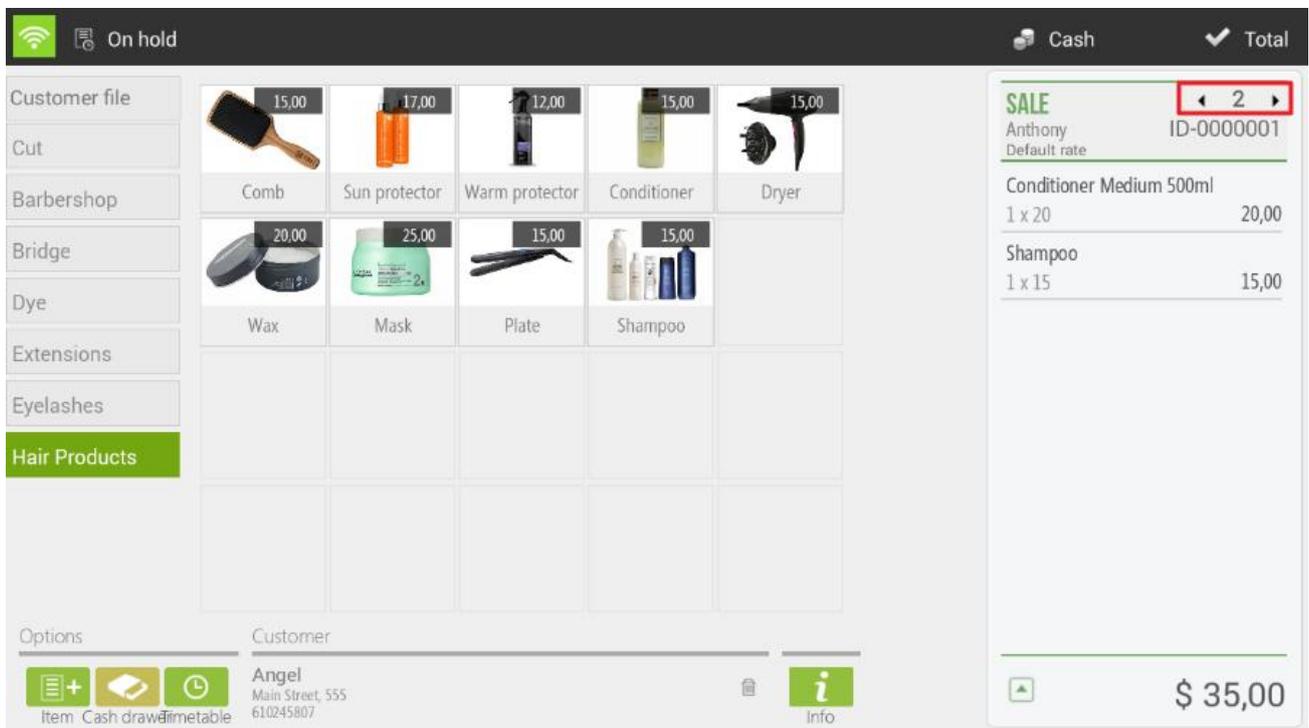
To total and finalize the fractional tickets follow the usual procedure of sale, press *Total* to access the selection of types of payment and then finish the sale. Note that each split ticket is finalized separately, one is made first and then the other.

2.7.2. New Split

HioPOS Cloud includes a function so that you can start a second ticket of the same sale without having to finish the current one or leave it on hold.

Click on the header of the ticket and select *New Split.*
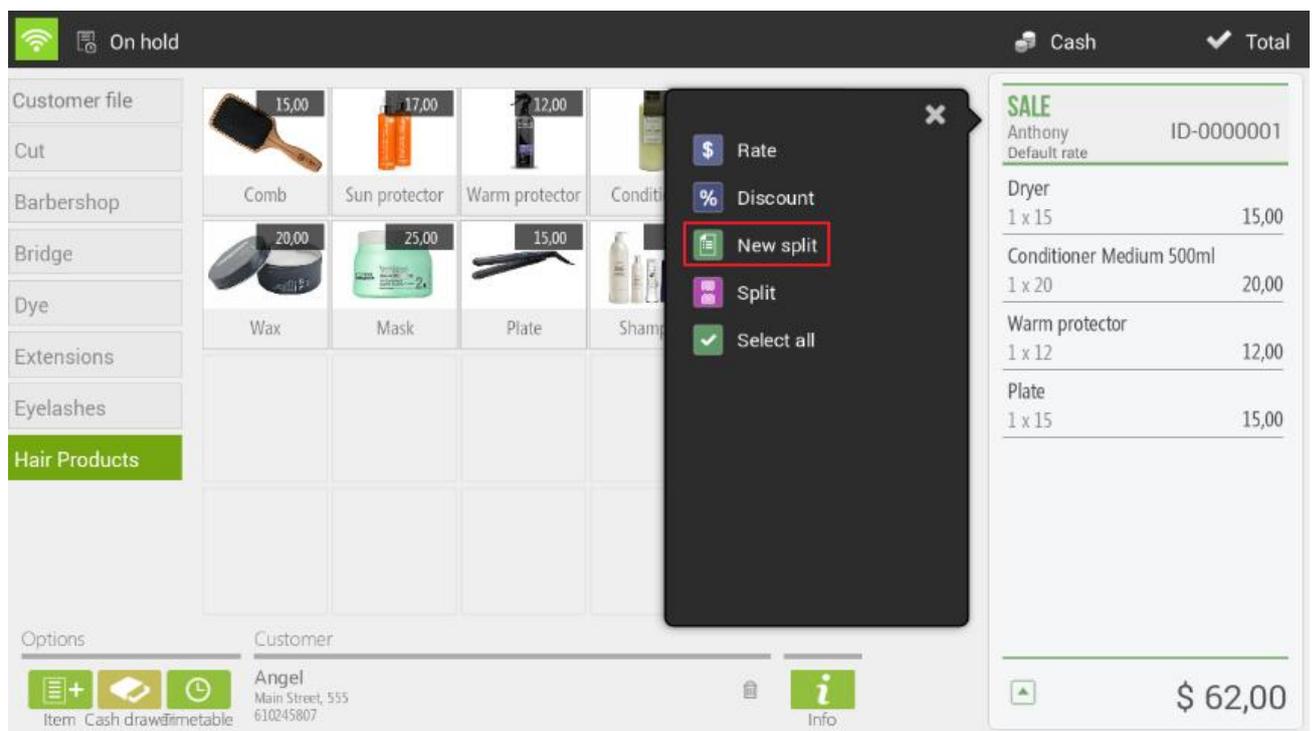
You will see that the ticket is set to zero and the number two appears at the head of the same, this means that it is in ticket number two, to move between tickets use the arrows next.
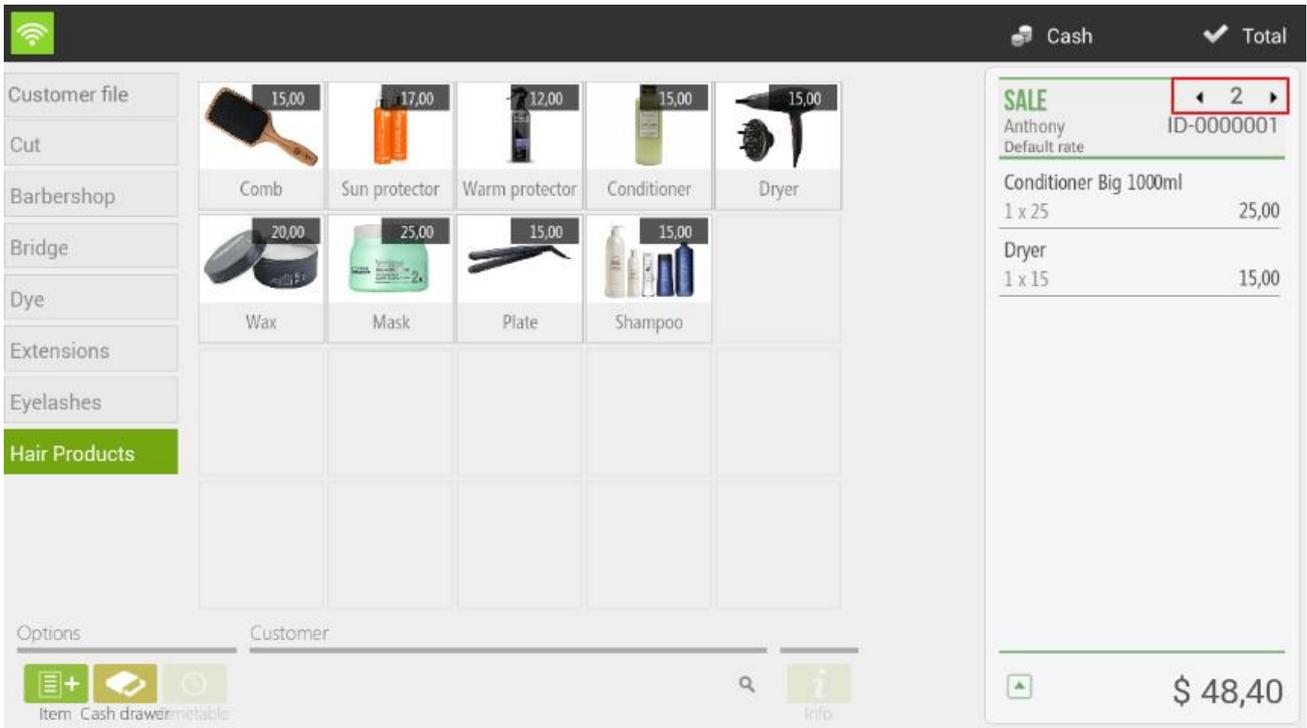
To finish the sale of a fraction, follow the usual steps
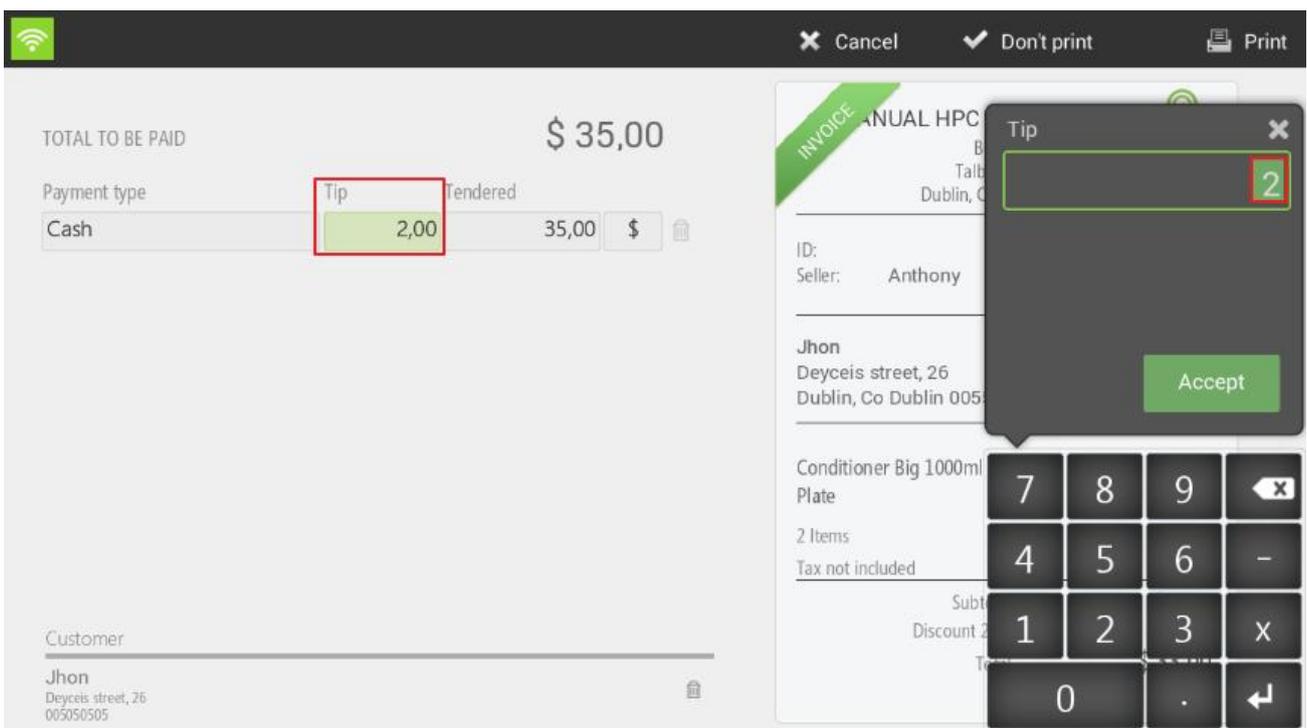
2.8. Tips and Service charge

Both the tips, whether accepted or not, and the service charge options can be configured from the *Terminal Type* section in the HioPOS Cloud *Configuration*.

2.8.1. Tip

The gratuity is an amount that is modified freely at the end of the sale, so the amount of the gratuity is not subject to a percentage or value on the sale.

To enter the tip, you have to be in the selection screen of the types of payment, once the ticket has already been totaled. Select the Tip box next to the selected payment method and add the corresponding amount. You finish the sale with or without printing.

This option will be selectable if the option of *Allow overpayment* (*and destination: Tip*) has been activated in the *Settings, Payment method.* You can find the main configuration in the *Configuration* section, *Terminal type, Tip.*

At the *Tips* section, we can configure if we want to *allow tips*, *apply automatic tip to pay, Percent of tip* and three different *suggested tip percentages.* 2

Even if the option of *Allow overpayment* with tip destination is activated in the payment type, if in the configuration of *Type of terminal* tipping is not allowed, when you finalize a sale, you will not be able to add a tip manually. The reason is that the configuration reflected in the *Terminal Type* is above the configuration of the Payment Types. If desired, the tip can be automatically applied when charging and determining a percentage for it.
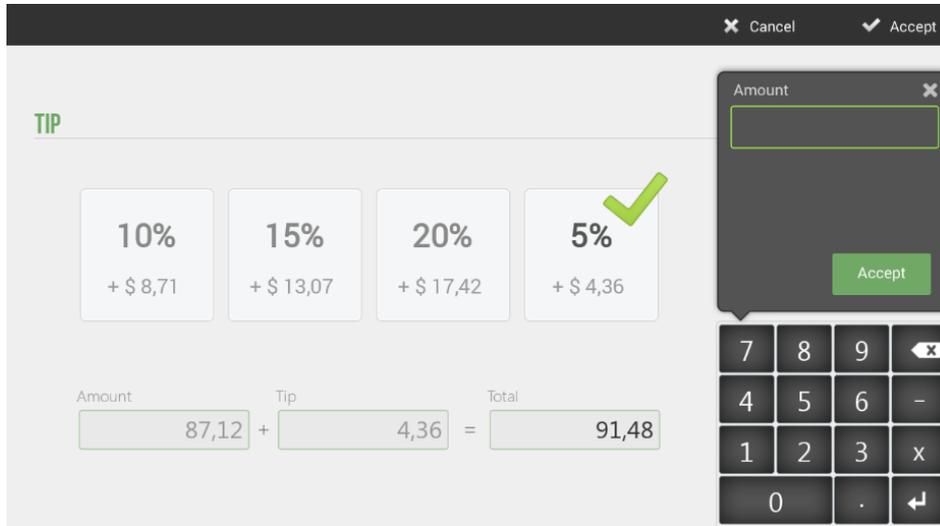
2.8.2. Service charge

In *Terminal Type*, from the *Configuration menu*, select the percentage to apply to each sale. It is important to determine if it's better to apply before or after discounts and if it's any charge with oneself.

The service charge, to difference from tip is always applied on the total sale.

2.9. Pack items type

The creation of packs allows you to group items or services as if they were a single item for the same price.

To access the creation of packs, go to the *Settings* section and select the *Packs* option. Here you can create new packs or edit existing ones.

2.9.1. Creation and maintenance of packs

The main screen of the Pack module is the following:

From the general options of the menu, you can modify the name, the number of groups that make up the pack, the package price, if you want to print on the ticket the description of the articles of each group and the family where the article will be found ready.

Each group can contain as many articles as you want, as well as select which days each article will be available.
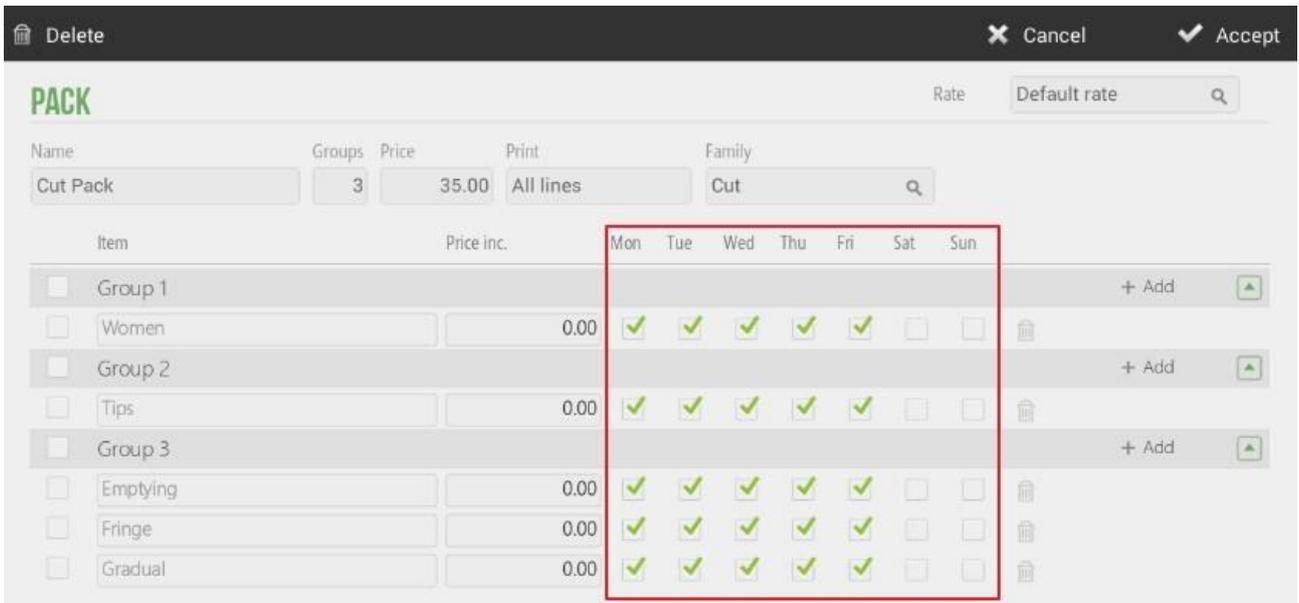
In addition, you can add a supplement or price increase per article, which would be added to the total price of the pack.
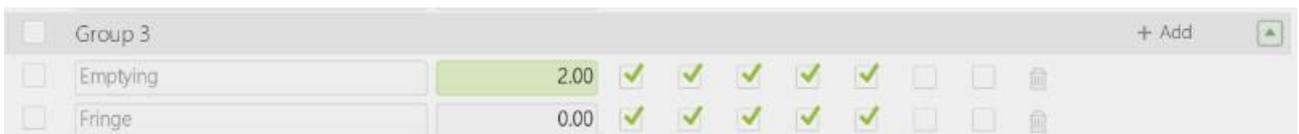
2.9.2. Sale of packs

First you have to have a pack created, as specified in the previous point, and this pack has to be assigned to a family.

On the sales screen select the family that contains the pack and then select the pack from the list of items. You will see the articles or services that comprise it, as well as the articles available for each group (the articles can be configured for days of the week).
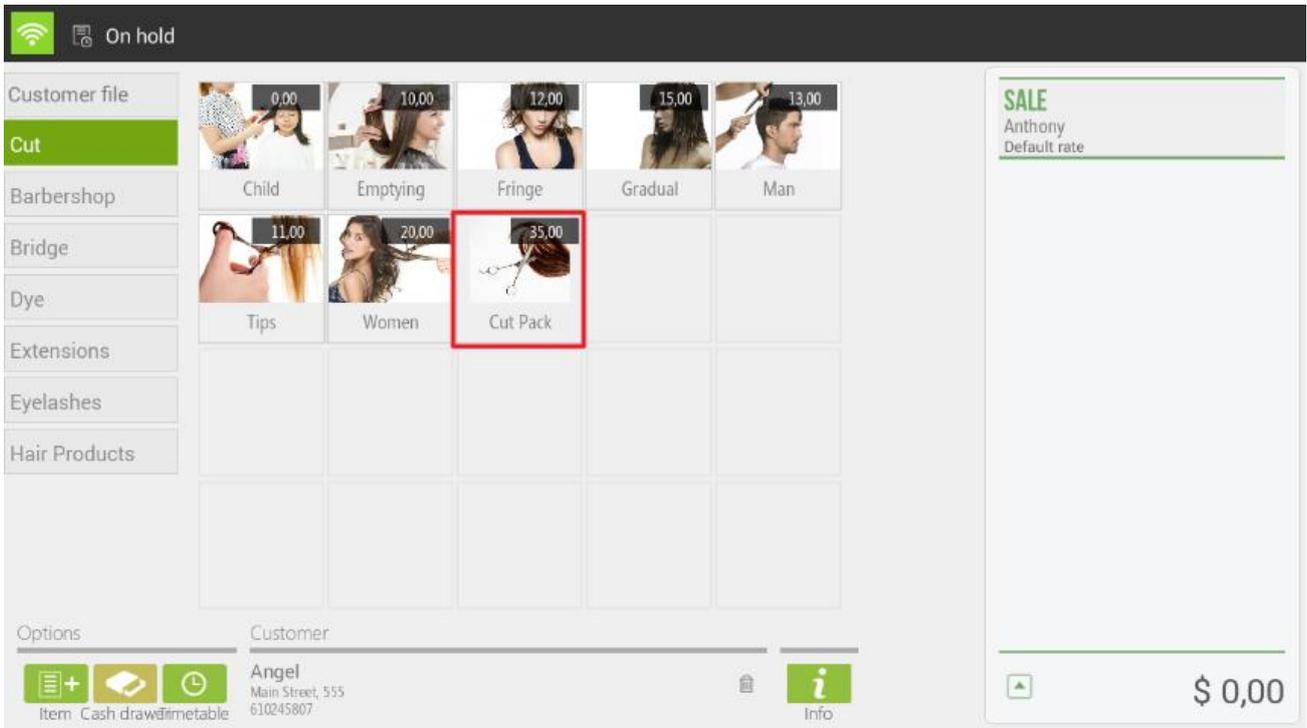
 Select the desired items or services from each pack group, then the program will direct you to the calendar screen so you can schedule the services previously selected in the pack one by one.

In the pop-up you see: the service you want to schedule, the duration of this, the total duration of the pack and the client to whom the pack has been sold.

The total duration of the pack will decrease depending on how the pack services are scheduled.

If you do not want any service pack, at the time of scheduling you must select the cancel cross that appears in the calendar pop-up.

2.10. Sellers group

In *Settings* you find the option of *Sellers group* where the different types of employees that exist will be managed. That is, we can join different employees in the same group.
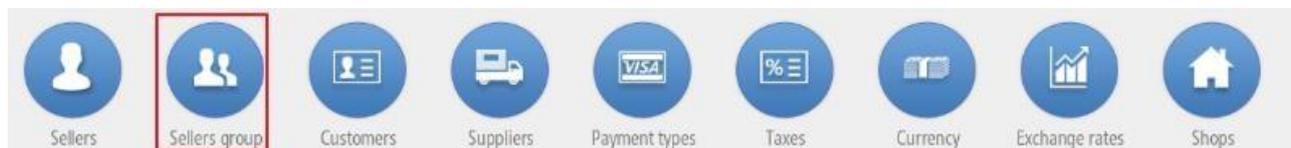
From the *New* button, you can create a new group of employees and add a name.
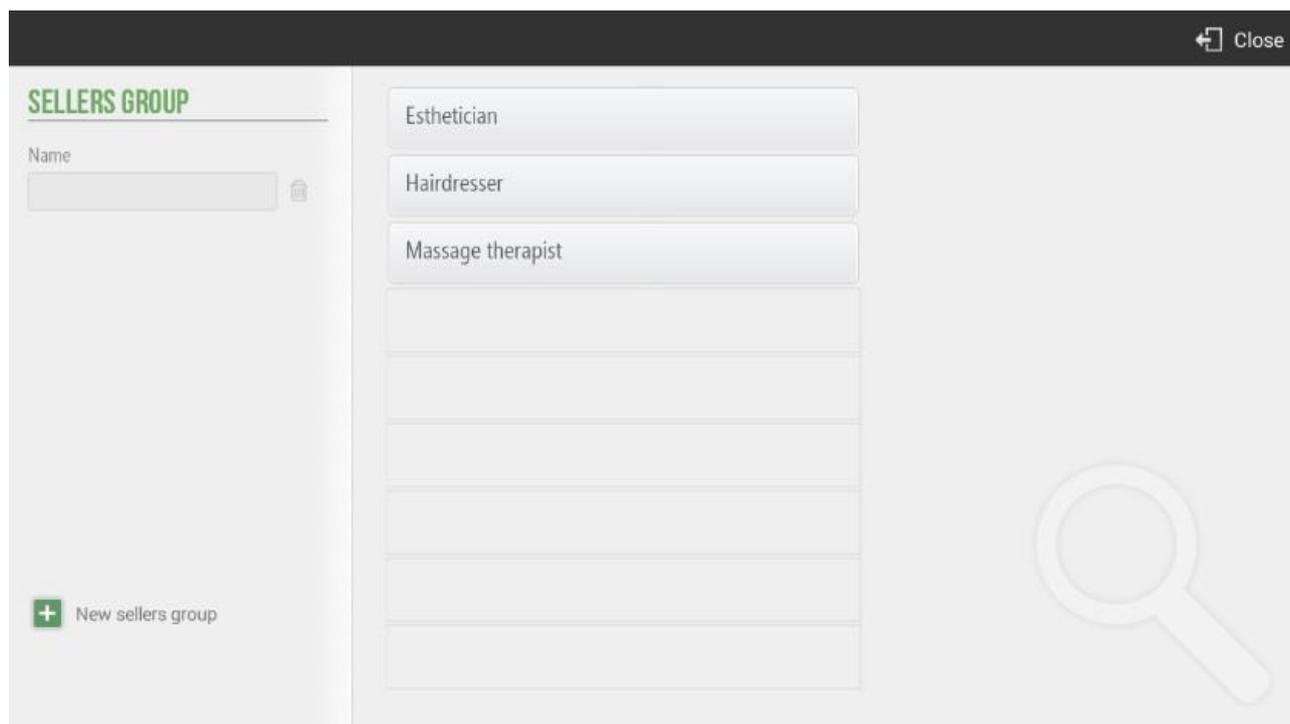
3. Consult Sales

To consult the tickets that have been made you have to make a sales query. Click the *Consult* button and select *Sales*.
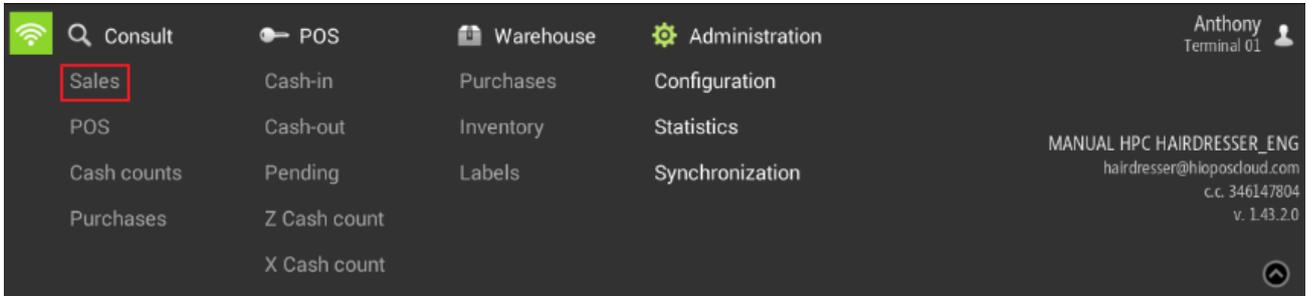
You can enter the sale number in the upper left field to access it or filter by Box, Date, Z Arrange, Customer, Vendor or Type of sale in the upper right panel.
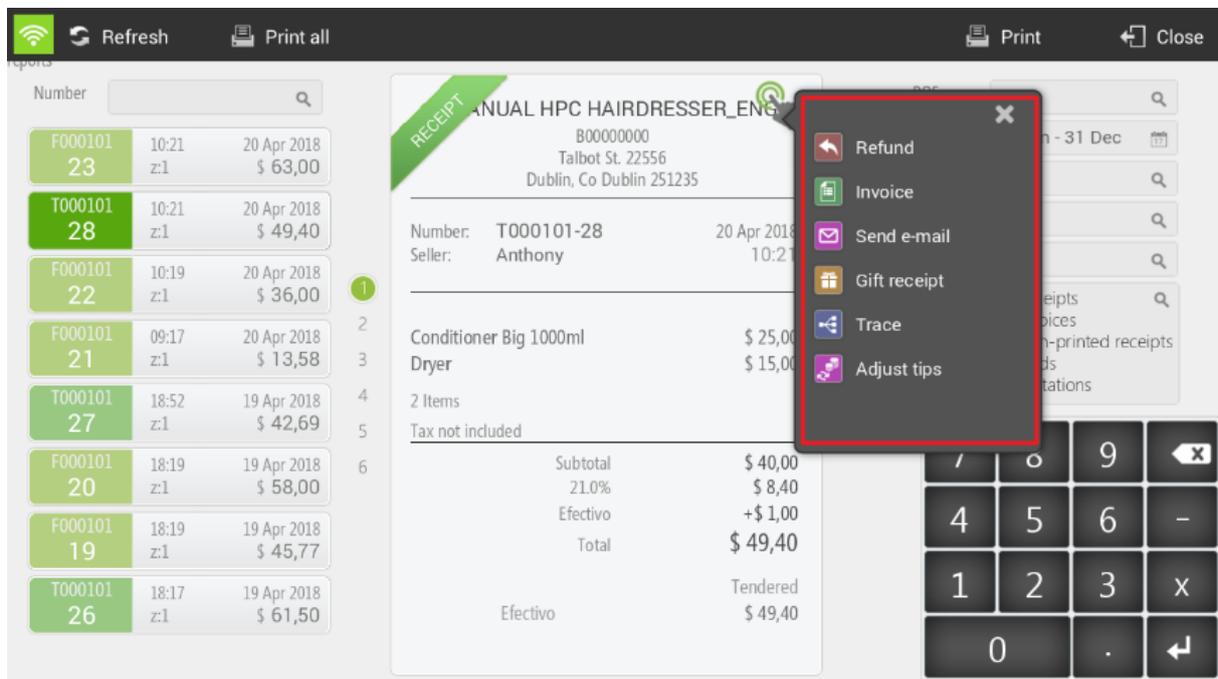
By selecting above the ticket, there are different options:

- Refund: you can refund line-by-line or all lines directly.
- Invoicing: this option always forces you to select a client. You can create it again or select it if it already exists. Then, the ticket and the invoice will be paid automatically.
- Send email: you must write to which e-mail you want to send the ticket.
- Gift ticket: print the ticket without sale amount.
- Trace: you can see the tracking of this ticket, to check if there is a ticket or invoice.
- Adjust tips: with this option you are able to adjust the tip.

You can print ticket for ticket or select in the option *Print all,* and will start to print all.

4. Seller configuration

HioPOS Cloud allows the configuration of our Sellers. The application generates, by default, 3 different vendor types. In the initial moment, they will be created: An Administrator user, a Manager user and Seller user with different permissions depending on his figure. For the correct configuration of the different permissions, see the section: *User Profiles* of this manual.

In *Configuration*, *Sellers* can consult the current sellers, configure them (assigning them a seller profile) and add new sellers. You can filter these features according to Name, Profile or Store.
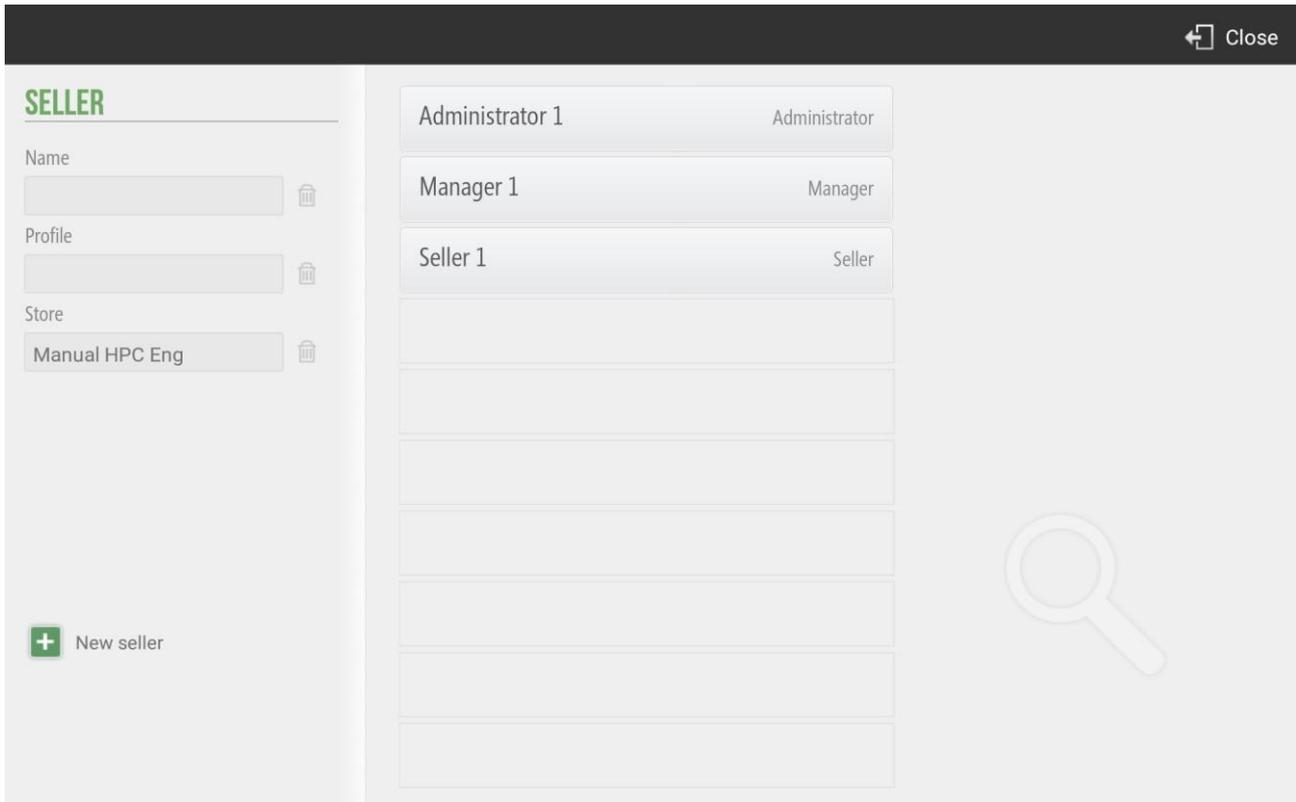
4.1. Time clock

HioPOS Cloud allows the Time Clock of the different user profiles that access the application. The correct implementation of the Time Clock is divided into three steps. First, the configuration of the Seller Access in the terminal. For this you will be located in *Configuration*, *Seller* and you will select *Seller*.

In the resulting screen you can modify the information fields, such as Name, NIF, etc. In the section on the right; *Access,* HioPOS allows us to configure a password for presence control as well as a password to enter the program. If you want to configure the time clock, you will set a password in this field.

Once you have configured the presence control password in *Settings, Vendor, Access*, you will be on the initial screen. To start the application and enter to view the calendar screen, you must select *Entry* in the upper left margin of the screen and enter the user's password. To proceed to the entry, you select the green Tick that appears next to the password.
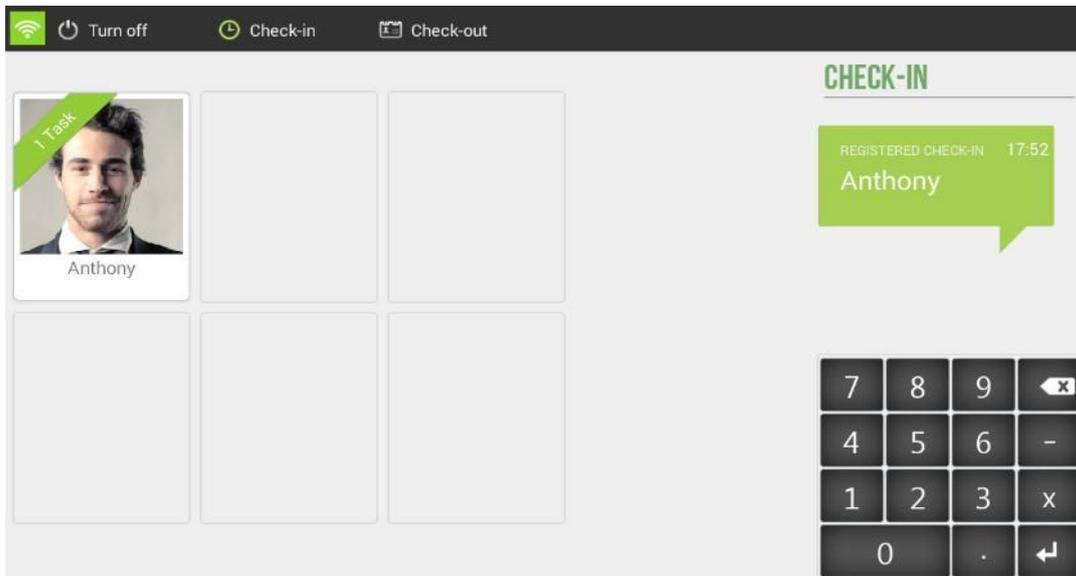
To confirm the correct registration of the user when starting the application, HioPOS launches the following warning message; *Registered entry*. The message shows the registration time and the registered user.

For the analysis of all the information retained in the Time Clock, the user should go to the section of *Administration*, *Statistics*, *Audit* and the option; *Time Clock* from where you can check the time clock of the different registered users.

In this report a table appears where the user can consult the Seller, the Check-in time and the Check-out time and the total minutes that the user has been connected in the application.

You can filter the time clock reports by store and by seller for a more detailed and in-depth analysis of the information contained. You can filter the time clock by date by choosing the period of time you want to analyze.

4.2. Assignation by sellers group

This option allows you to assign to which group of employees each seller belongs.

5. Cash Count

The cash count gives us a real picture of the transactions that have been made since the last cash closing. There are two types of cash count, Z Cash Count (for a definite POS closure) and X Cash Count (only what Z cash count would look like if it was done at that time).
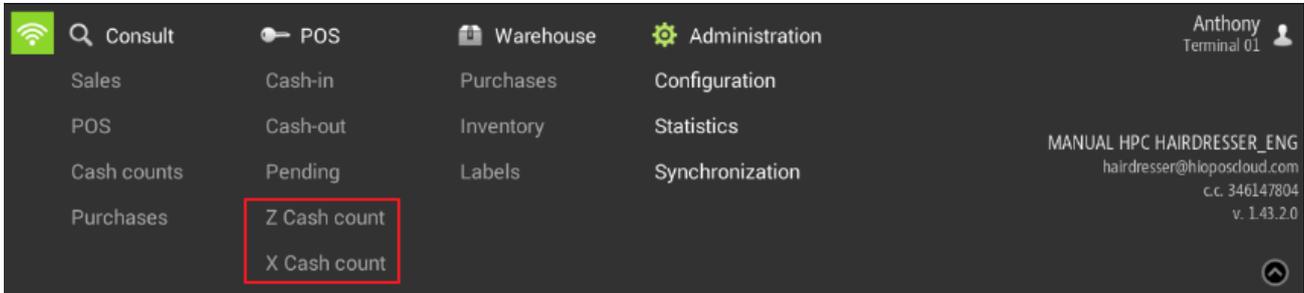
5.1. Z Cash Count

The Z cash count represents a definitive cashier closing. Once done this cannot be modified and it is from that moment in which any other transaction will form part of the following Z cash count.

Z cash count consists of three parts, the declared, the cash control and Z cash count report.

If there were sales on hold, the application would show you a message to inform it and you should select whether to continue or cancel. In Configuration> Terminal Type, you must select whether to allows to do a Z cash count with open sales.
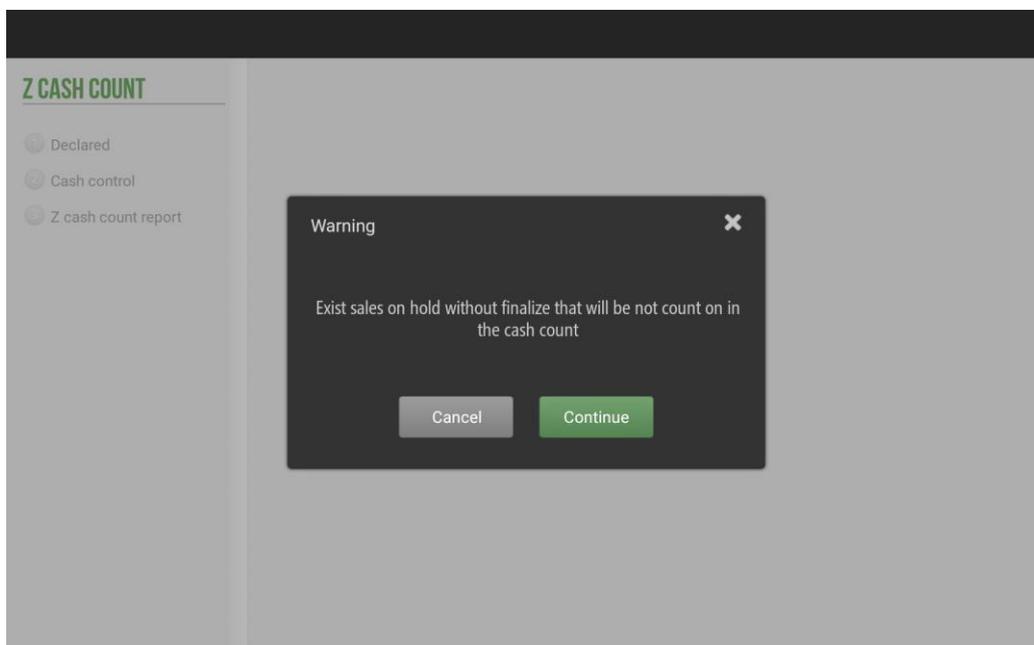
5.1.1. Declared

Enter the total amounts of each payment medium with which you have made a transaction in the period corresponding to this cash count.
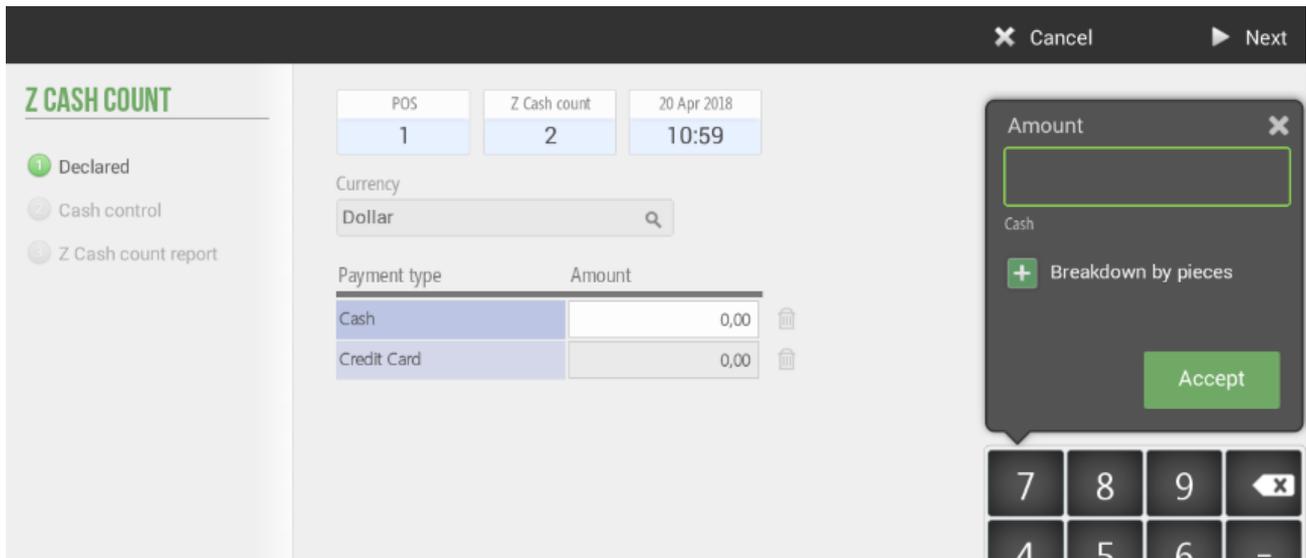
This is useful for calculating cash drafts. In case there is one, selecting *Next* the same application would notify you.

You can also select the currency with which you want to do the cash count.

If you had pending sales, the application will inform us, but you could make the cash count.

There is the option when you are picking the amount of *Breakdown by pieces.*

5.1.2. Cash Control

The main function of the cash control is to enter the amount that you are going to withdraw from the cashier and introduce the *New float*, which will be the float (or initial amount in cash) that you will have the next day to start the day.

The first box shows the float that was introduced the previous day, is not modifiable.

The three following boxes show the sales, cash-ins and cash-outs of cash that have been made in the period corresponding to the present Z cash count.

If there is a difference between the calculated total (deposit + sales + Cash-ins + Cash-outs) and the total declared, the application will show us in red the existing mismatch between the two.

Total calculated	371,94	Discrepancy
Total declared	371,94	0,00

5.1.3. Z Cash Count Report

Displays the total of the transactions made in the analysis period, separating by:

- Cash Balance

Z CASH COUNT

- ① Declared
- ○ Cash control
- ③ Z Cash count report

MANUAL HPC HAIRDRESSER_ENG
B00000000

POS	Z Cash count	20 Apr 2018
1	1	10:54

CASH CONTROL (Dollar)

Deposit	$ 0,00
Sales	$ 369,94
Tips	$ 2,00
Cash-ins	$ 0,00
Cash-outs	$ 0,00
Total calculated	$ 371,94
Total declared	$ 371,94
Discrepancy	$ 0,00
Withdraw	$ 371,94
New deposit	$ 0,00

SUMMARY BY CURRENCY (Dollar)

- Summary by currency

SUMMARY BY CURRENCY (Dollar)

	Calculate	Declared	Discrepancy
Cash	$ 371,94	$ 371,94	$ 0,00
TOTAL	$ 371,94	$ 371,94	$ 0,00

- OverPayments

OVERPAYMENTS (Dollar)

	Tips	Leftover
Cash	$ 2,00	$ 0,00
CashDro	$ 0,00	$ 0,00
TOTAL	$ 2,00	$ 0,00

- Sales by seller

SALES BY SELLER

	Sales	Amount	%
Anthony	8	$ 369,94	
TOTAL	8	$ 369,94	

– Taxes summary

TAXES SUMMARY

	Base amount	Tax
IVA 21%	$ 162,40	$ 34,10
IVA 10%	$ 10,00	$ 1,00
IVA 4%	$ 11,00	$ 0,44
TOTAL	$ 183,40	$ 35,54

– Sales by family

SALES BY FAMILY

	Units	Amount	%
Cut	3	$ 51,37	■
Barbershop	1	$ 5,00	I
Bridge	3	$ 90,75	■■
Hair Products	12	$ 217,97	■■■■■
Charges and discounts	0	$ 3,95	
Rounding	0	$ 0,90	
TOTAL	19	$ 369,94	

– Sales by range

SALES BY RANGE

	Sales	Amount	Average
F000101	5	$ 216,35	$ 43,27
T000101	3	$ 153,59	$ 51,20
TOTAL	8	$ 369,94	$ 46,24

– Sales summary

SALES SUMMARY

Sales value	$ 365,99
Discount amount	$ -3,05
Charges amount	$ 7,00
Voided sales value	$ 0,00
TOTAL	$ 369,94

You can select whether or not print the Cash Count, and if you want to send by email. To re-view an already made cash closing from the *Cash Count* option in the *Consult* tab.

You can select if you want to send by e-mail the Cash Count automatically, in the section *Configuration*, *Store*.

5.2. X Cash Count

It shows how the X Cash Count will be at that moment, starting to calculate from the last Z Cash Count realized. The X Cash Count can be useful when working in turns, either cashier or different schedules within the same day.

There is no record of the X Cash Count made, but can be printed or sent by e-mail.

5.3. Consult Cash Counts

Once you have made a Z cash count, if you want to re-visualize it you will have to press the *Consult* button and select *Cash Count*.

Here you can find all Z Cash Counts made up to date, you can search by number of Cash Count in the upper left field or filter by *Date* or select the POS from which you want to see the cash counts, in the upper right panel.

6. Cash-in and Cash-out

The program has the functionality of cash in and cash-out. Cash-in are an amount of money delivered to the establishment and Cash-out are amounts delivered by the establishment.

To report a cash entry, you will have to select *Cash Flow* and *Cash-in* option. In it you will inform the amount delivered.

In case the delivered amount does not correspond with the actual amount - field amount -, this will generate a difference that will be displayed in the field: Change.

In the cash entries, the user can inform about the description of the same, that is to say, the concept by which he receives said input, for example, "cash charge".

You can also select the means of payment, within those previously configured in the application and set the Currency of transaction.

To report a cash out, you will have to select *Cash Flow* and *Cash-out*. In it you will inform the amount of the output and write in the description box, the concept of the same.

You can also select the means of payment, within those previously configured in the application and set the Currency of the transaction.

6.1. Cash consult

Once you have performed Cash-In and Cash-Out operations, the application allows us to check the incoming and outgoing movements. From the *Consult* option, *POS* will access the display of the Cash-In and Cash-Out can filter the same according to Pos, Date, Client, Seller and Types, Cash-Ins (green) and Cash-Outs (red) -.

With HioPOS Cloud you can also send the Cash consult by email or print it on a ticket printer.

In case you had the document number of the movement of entry or exit you could inform and visualize it directly.

7. Payment types

The program has already created by default the payment types Cash, Credit Card and Pending. You can configure the existing ones and create new ones in the menu *Payment type* of the *Configuration*.
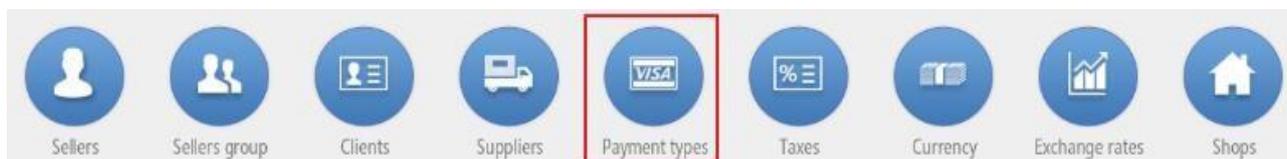
This is the configuration screen for them, select one of the existing payment methods or create a *New payment type*:
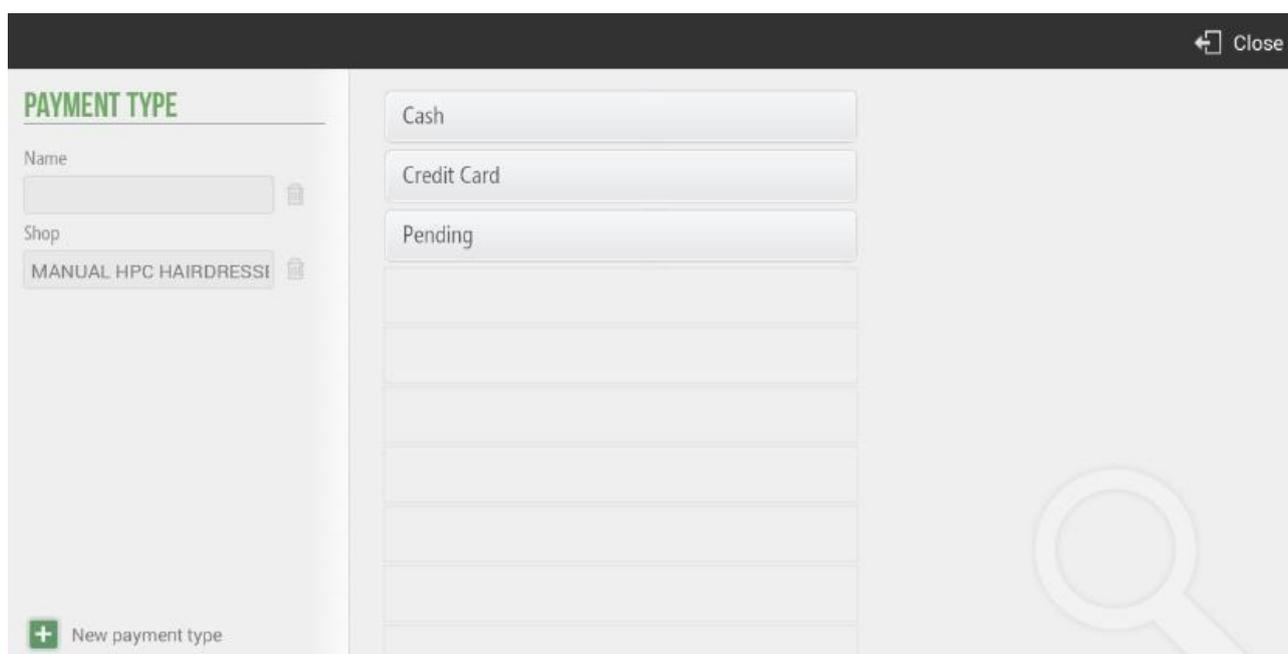
7.1. Modifiable Parameters

Each payment type can be configured Visible on the total screen: the means of payment will appear on the totalization screen of the ticket, in order to be selected as a means of payment for that transaction.

-   Visible in the total screen: the payment type will appear on the tantalization screen of the ticket, in order to be selected as mean of payment for that transaction.
-   Open drawer when totaling: one the sale ends the drawer will open (requires a drawer to be connected, set in the section *Configuration Devices*)
-   It is a means of payment on credit: When using this method of payment, it will be necessary to assign a customer to the document, in order to keep track of sales on credit from the option *Pending* on the *Cash* tab of the upper menu. The literal "on credit" means that it is a sale that has not been charged, if you do not active this check, you will make a sale with the payment method "Pending" but will actually be made as a normal sale, and in the section POS, Pending , these sales will not appear.
-   It is mandatory to assign a customer: the customer's data will appear printed on the ticked, in addition to being invoiced or sent the document via email if it is configured.
-   Allow overpayment: In case of accepting overpayments, you can select which application to give this amount (*Change, Tip or Overdraft*), so that it appears reflected in the ticket.
-   Minimum Amount: Enter the minimum amount of the transaction so that this payment method can be used.

You can also set whether the means of payment has to be declared in the Z-Cash count (upper tab). Select whether the means of payment is mandatory to be declared, if it is optional or if it is never declared.

PAYMENT TYPE

Name

Pending

| Total | Z Cash Count | Charges and discounts |

To be declared

Never

Optional
Mandatory
Never

Delete   Cancel

Also, there is the option to apply *Charges and discounts* at the payments types. This option is available for all payment types.

PAYMENT TYPE

Name

Cash

| Total | Z Cash count | Charges and discounts |

Charge/discount type

None

None
By amount
By percentage

Delete   Cancel   Save

For example, let's imagine that in the cash payment method you charge to the client a fee of € 1, so in the ticket this increase will be shown in the total to be paid, as shown below:

When you select the *Cash* as a payment type, the fee will be shown in the ticket.

7.2. Payment type: Cash

The cash means of payment has limited configuration options due to their nature, and cannot be removed from the payment types.
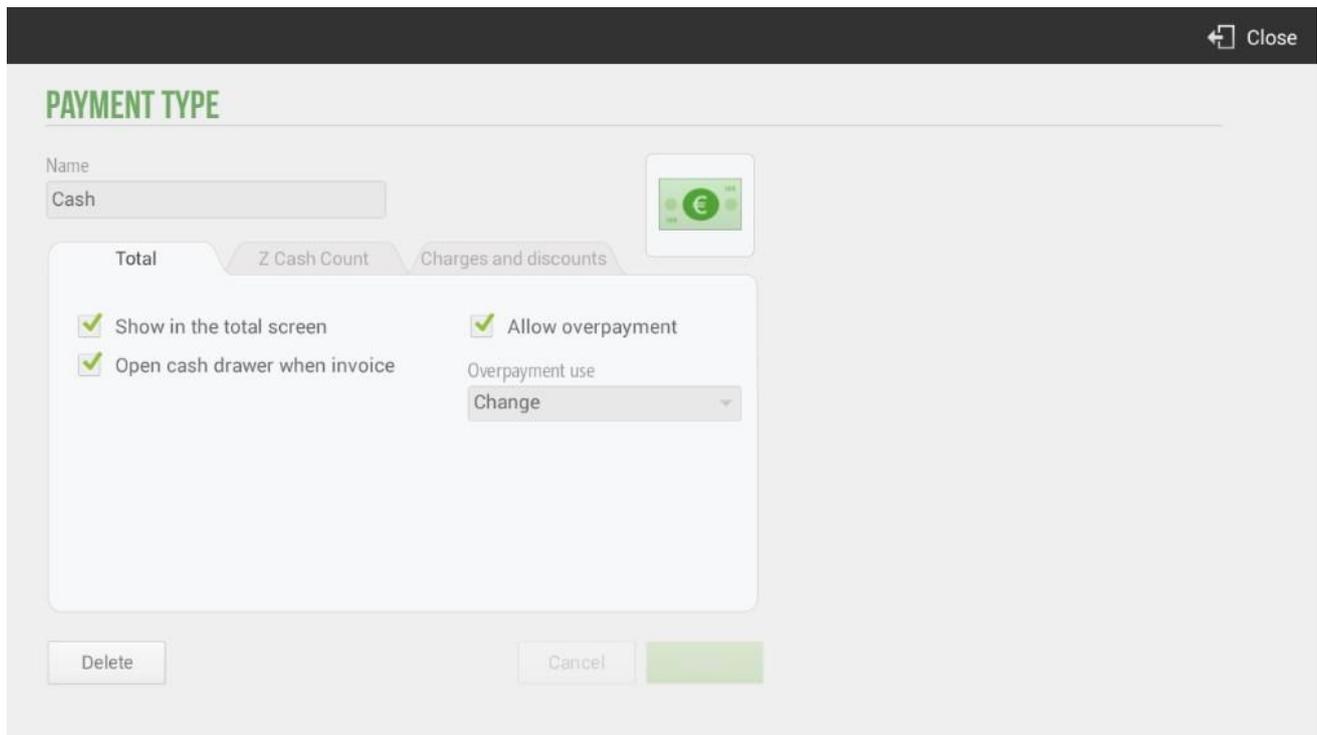
Thus of the options that can be modified originally only those that have relation with the cash collection are available.

7.3. Payment type: Card

This means of payment also has a special configuration and cannot be eliminated.
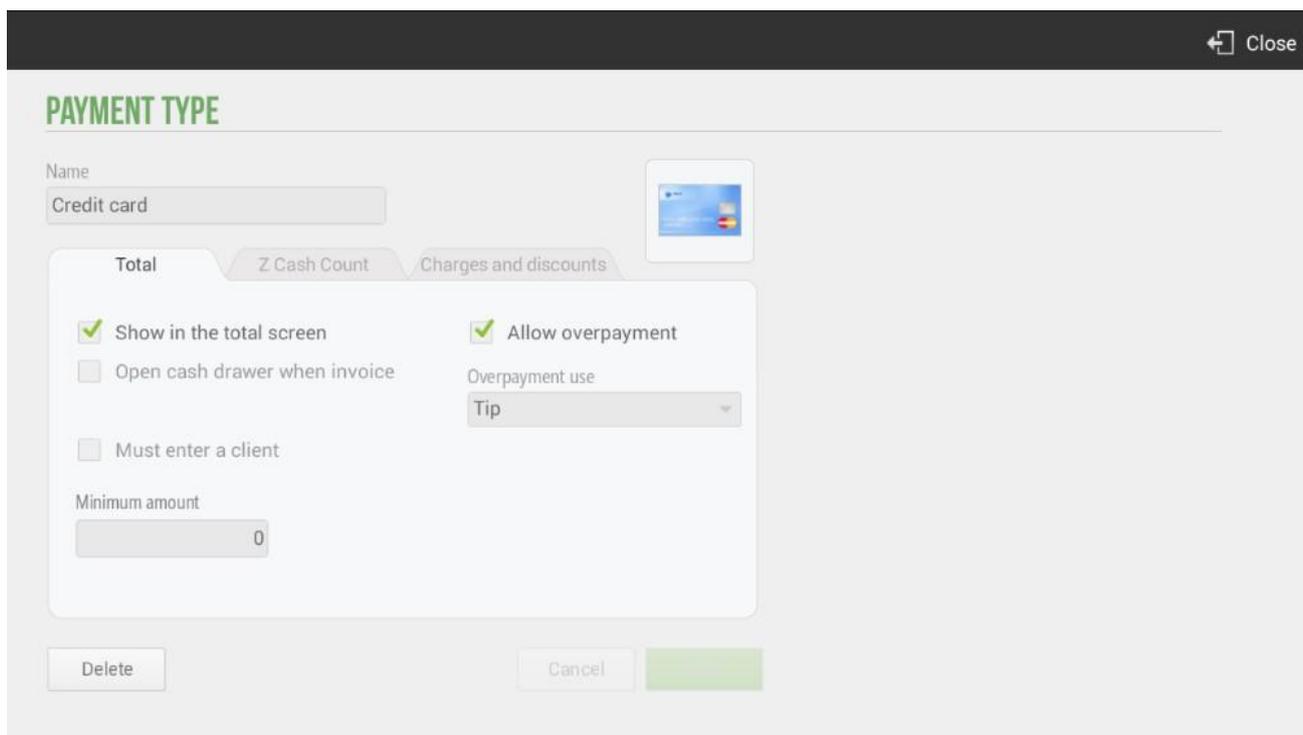
This means of payment is special also since it is connected with another module of the *Configuration*, the *Electronic Payment*.
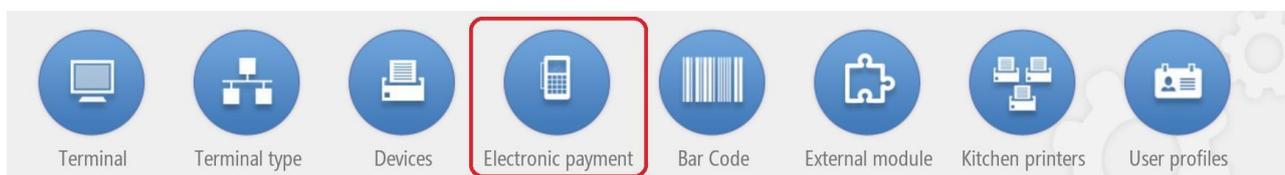
The configuration of the electronic payment depends on your bank provider, enter the data that you provide in the free boxes. Even so, the distributor must access CloudLicense and configure a payment gateway.

The electronic charging terminal can be connected via *Bluetooth* or via *USB port*. If you connect via a USB port, HioPOS Cloud will detect it automatically and simply select the port name. If you connect via Bluetooth, first make sure that the charging terminal is active and connected to the Android operating system from the S*ettings* of the same Android terminal.

As a parameter configurable and independent of the information provided by your electronic bank entity is the *Enter Tip*. Select if you are going to accept tips *before payment* or *Never*.
Depending on the nature of your electronic payment terminal, or how it is configured, the customer can sign on the terminal's screen. Set the parameter in the *Signature* box.

	Cancel	Accept

ELECTRONIC PAYMENT

Comercia Global Payments

Connection
BLUETOOTH

Device (Bluetooth)

☐ Habilitar login transparente

User
297569444

Business code
297569444

Terminal number
4

Enter tip
Never

8. Warehouse and Vendors

The *Warehouse* button offers a *Purchasing* module and an *Inventory* module. By means of these you will be able to control the availability of each product of the sale, to make a better forecast of purchase and not to fall in stock rupture.

8.1. Purchases

The HioPOS Cloud purchasing module allows you to manage the procurement of products. Go to the *Warehouse* tab and select *Purchasing*.
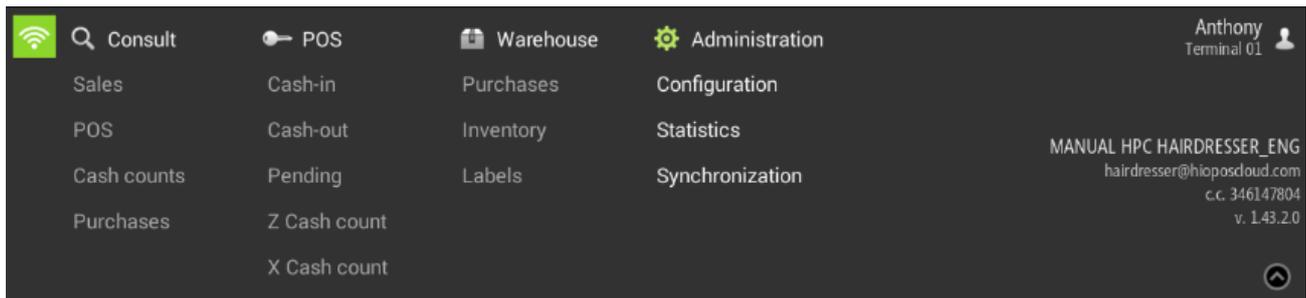
Select the products that you want to stock, as well as the purchase quantity and the cost of the same. If in the section of *Edit items*, *Cost* is an amount already fixed, it will appear on this screen. You can buy it at a different price than the existing one, just change it in this screen and it would be updated automatically in the section of *Edit items*.

The quantity you buy will be added to the total stock you have of the item.
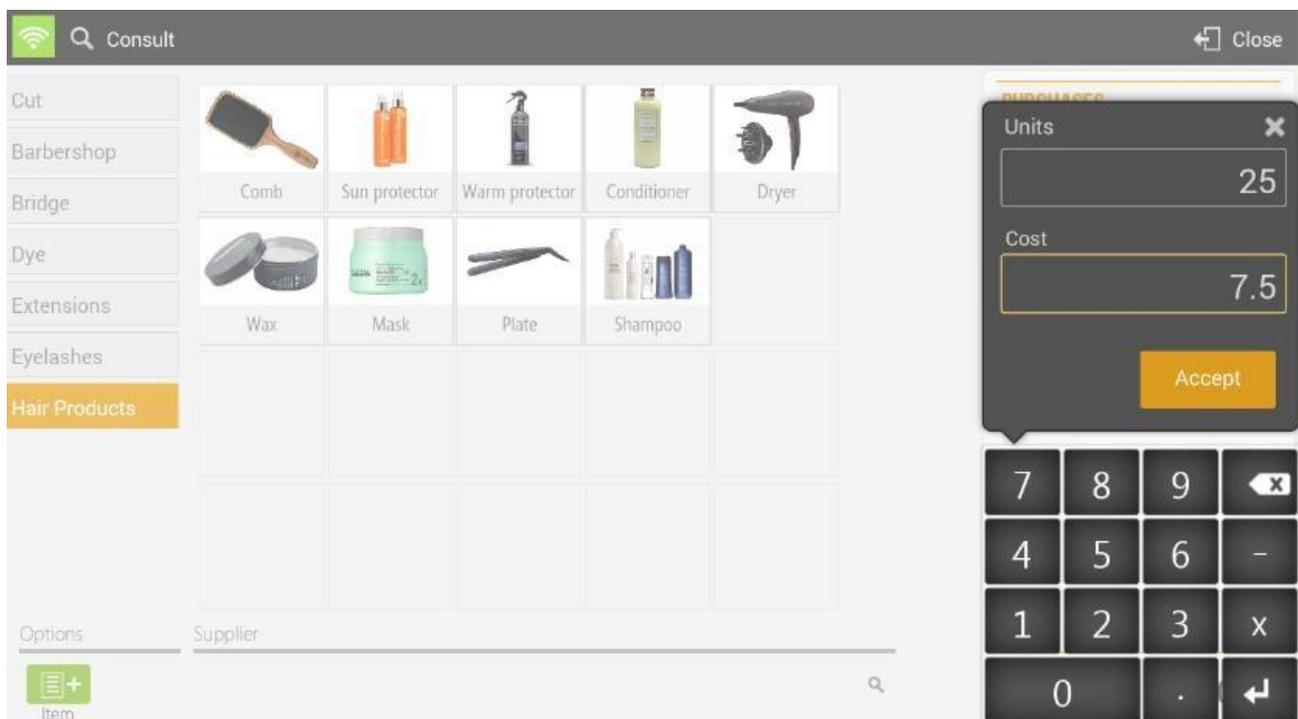
If you select one or more of the items that you have added in the ticket, you can modify the *Units*, apply a *Discount* in percentage on the price, change the unit C*ost* of the purchase and *Delete* the lines of the ticket.

In the cost, the numerical value that is by default will appear in the section of *Configuration*, *Items*, *Edit items* of articles or the last value of cost that was inserted when making a purchase.
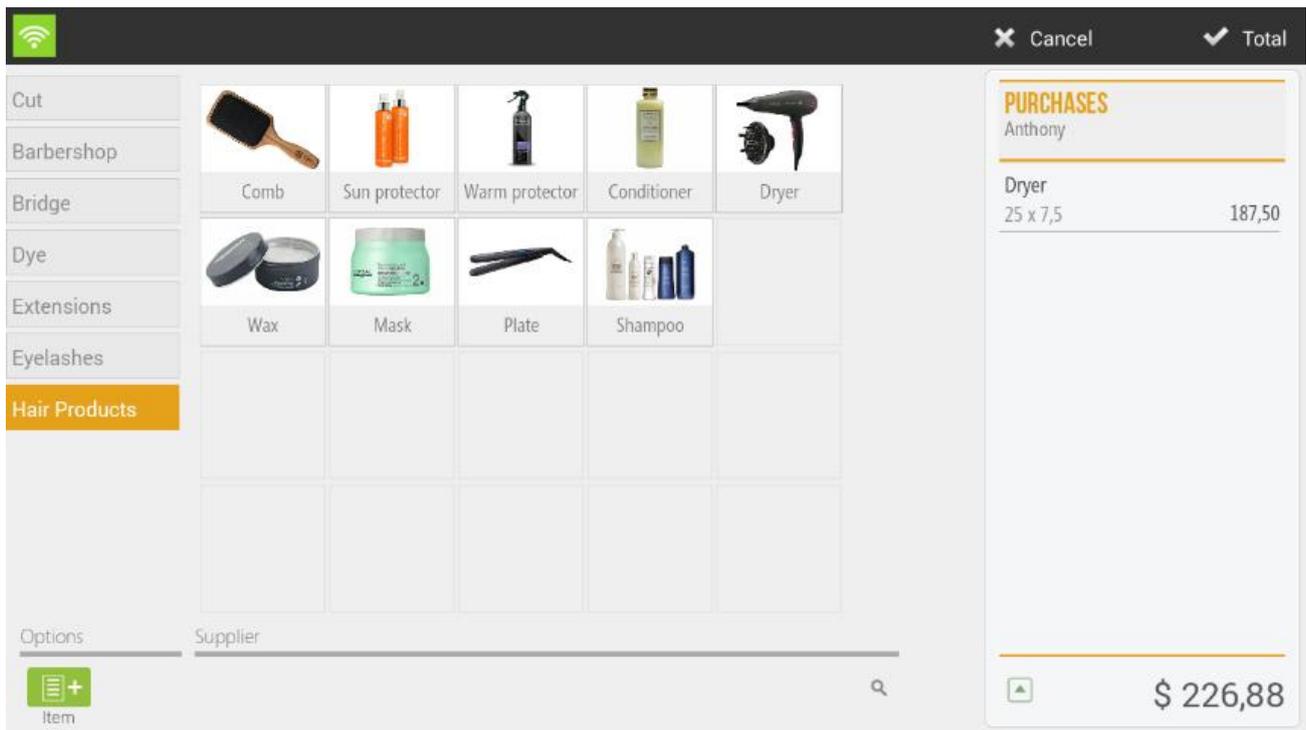
From the top menu you can access to see all the delivery notes of the purchases that have been made, select the *Purchases* option from the *Consult* menu.

8.1.1. Purchases by supplier

In the same module of purchases click on the box of the bottom where it puts *Vendor* and select one of the list.
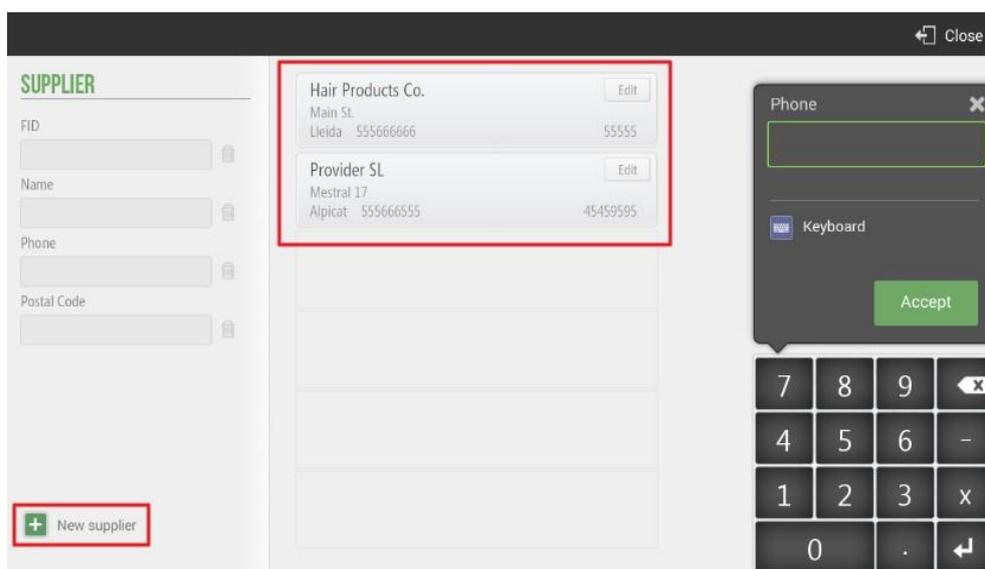
The delivery notes you make when you total the purchase will be assigned to the vendor you have selected.
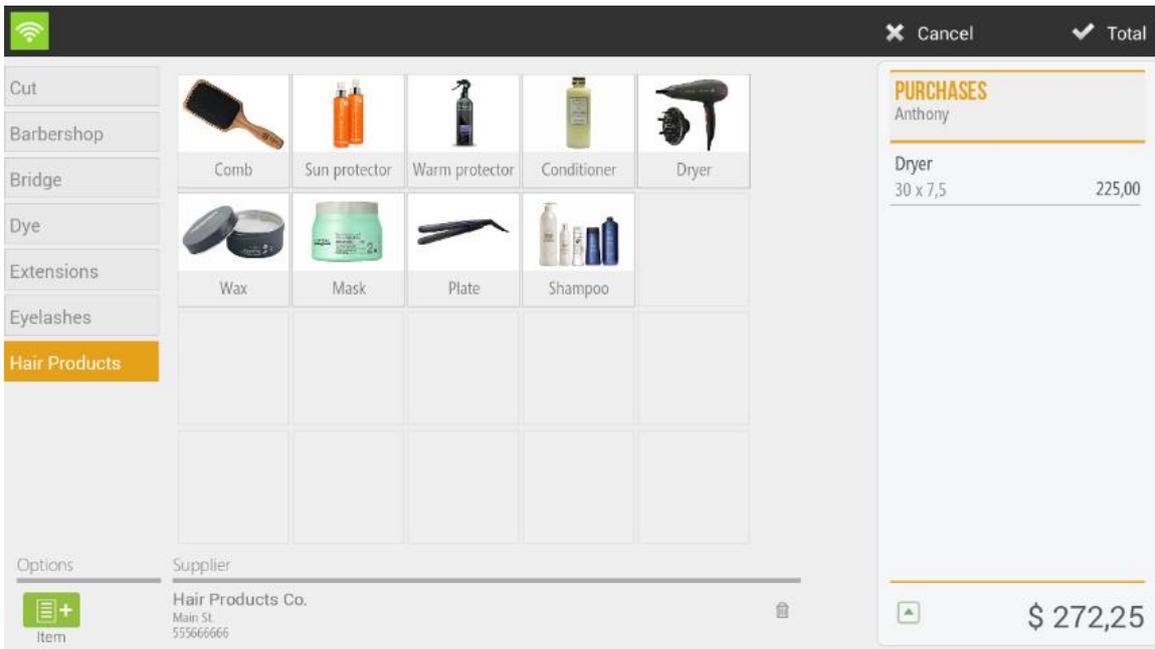
8.1.2. Consult Purchases

Look for the delivery note receipt for *Number* or filter by *POS*, *Date*, *Supplier* and *Seller*. You can reprint the documents if you wish.
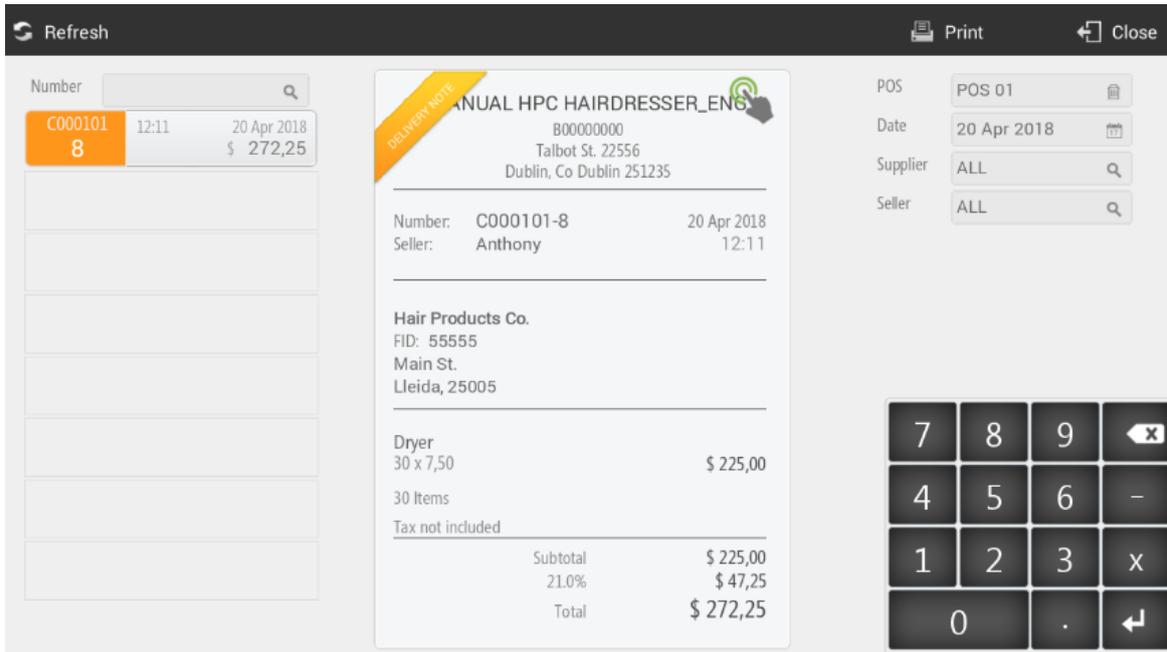
By selecting above the delivery note, there is the option to pay it.

8.2. Inventory

The inventory of HioPOS Cloud allows modifying the stock that you have. Go to the *Consult* tab and select *Inventory*.

Sales	Cash-in	**Purchases**	Configuration	
POS	Cash-out	**Inventory**	Statistics	MANUAL HPC HAIRDRESSER_ENG
Cash counts	Pending	**Labels**	Synchronization	hairdresser@hioposcloud.com
Purchases	Z Cash count			c.c. 346147804
	X Cash count			v. 1.43.2.0
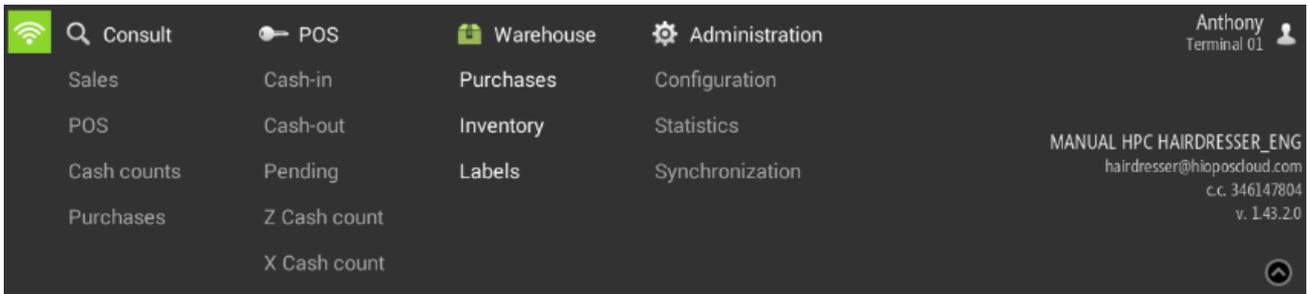
Select the products in which you want to modify the inventory. Enter the new product quantity and click *Finish*. At the time of modifying the stock, the program shows the current quantity of the stock.

						Cancel	Finish

INVENTORY

Stock

15

Shampoo
Stock : -5

Units in this inventory : 5

Accept

Cut	Comb	Sun protector	Warm protector	Conditioner	Dryer
Barbershop					
Bridge	Wax	Mask	Plate	Shampoo	
Dye					
Extensions					
Eyelashes					
Hair Products					

Options

Item

7	8	9	⌫
4	5	6	–
1	2	3	x
0	.	↵
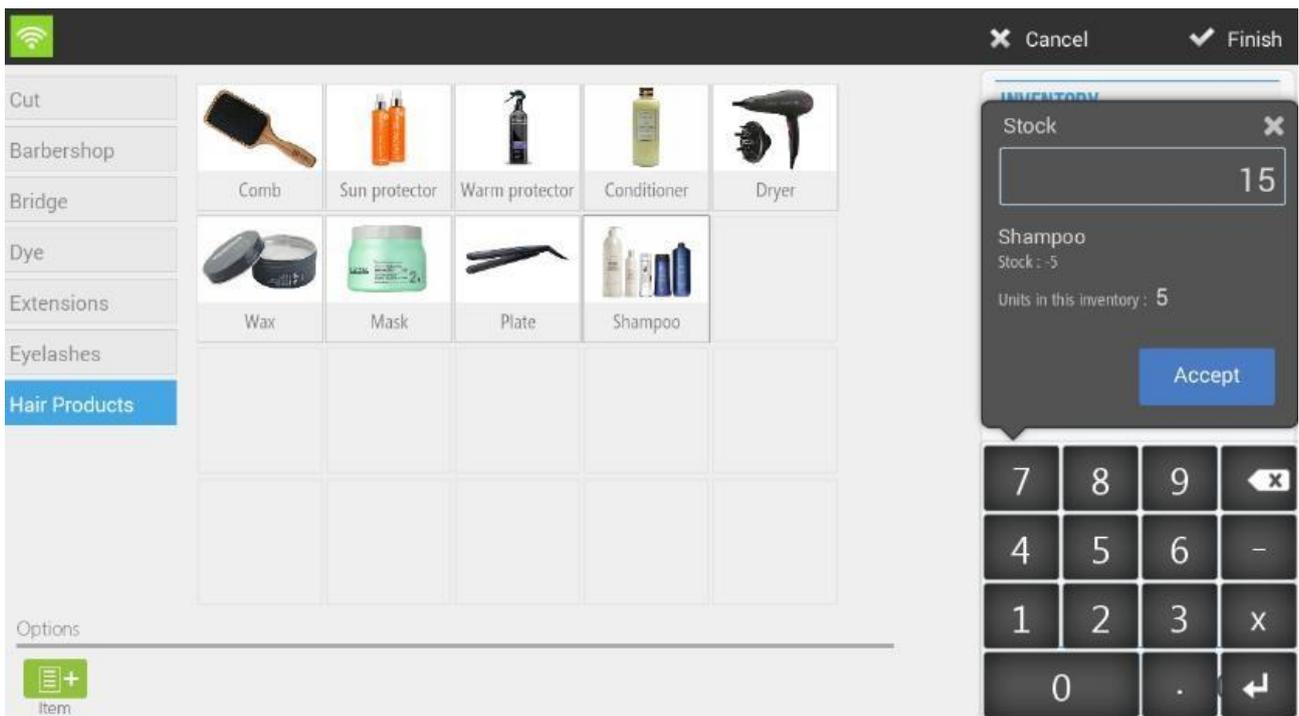
The ticket the items on which the stock changes are made will be displayed, on the one hand, the ew stock quantity **[1]** will be shown and on the other the variation on the same **[2]**.
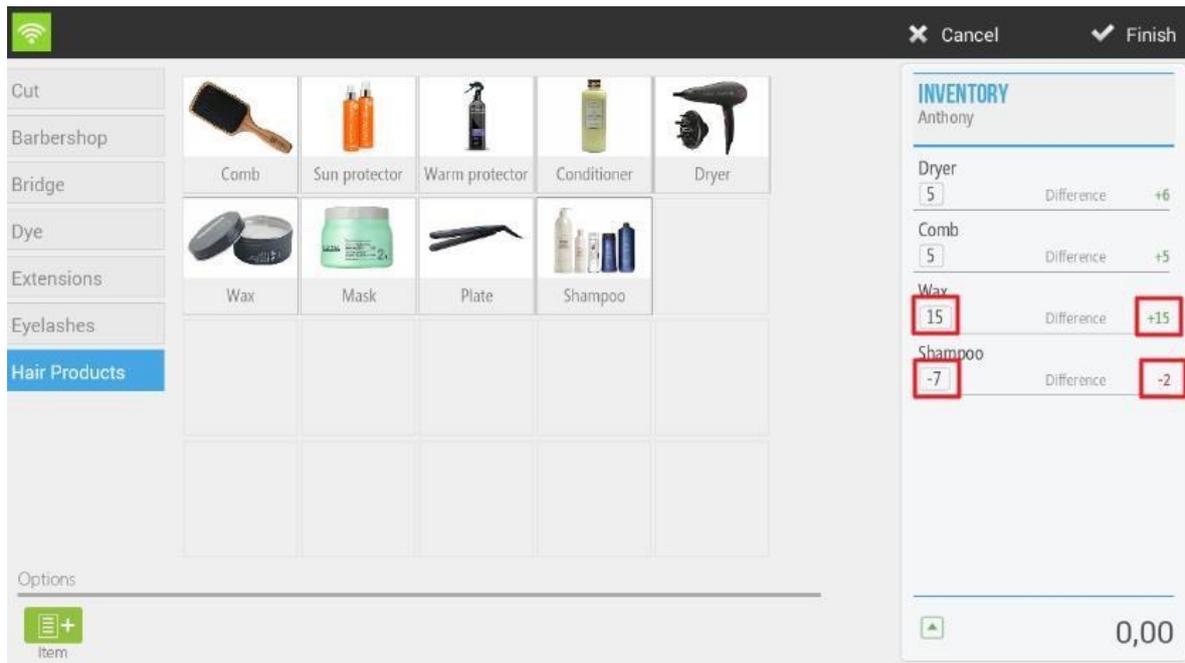
If you select one or more items from the ticket, you can modify the *Stock Units* and *Delete* the selected ticket lines.
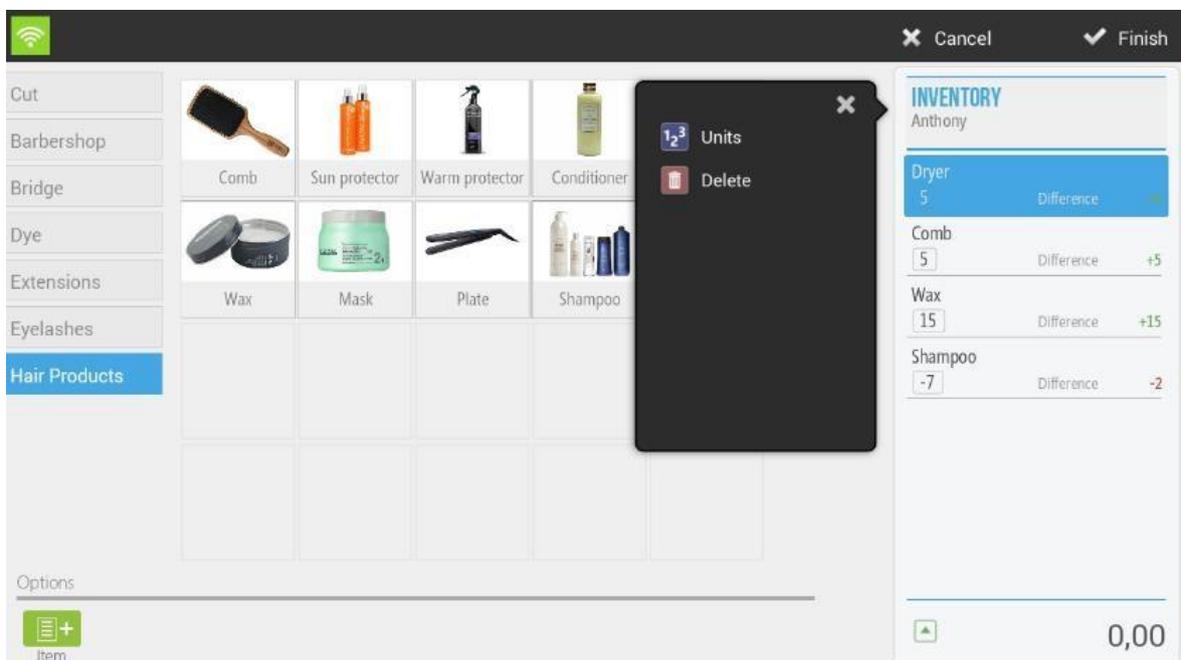
8.3. Suppliers

The suppliers are added to the purchase documents; thus they are registered in the purchase notes.

To create a new supplier, or modify existing ones, go to *Vendors* in *Settings*.
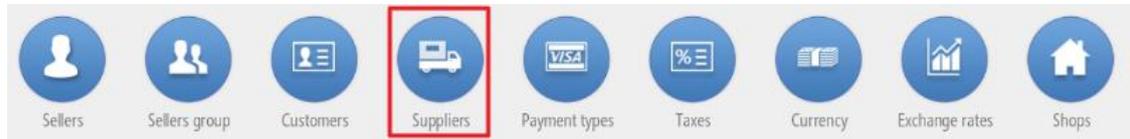
Select one of your existing suppliers or click *New Supplier*.
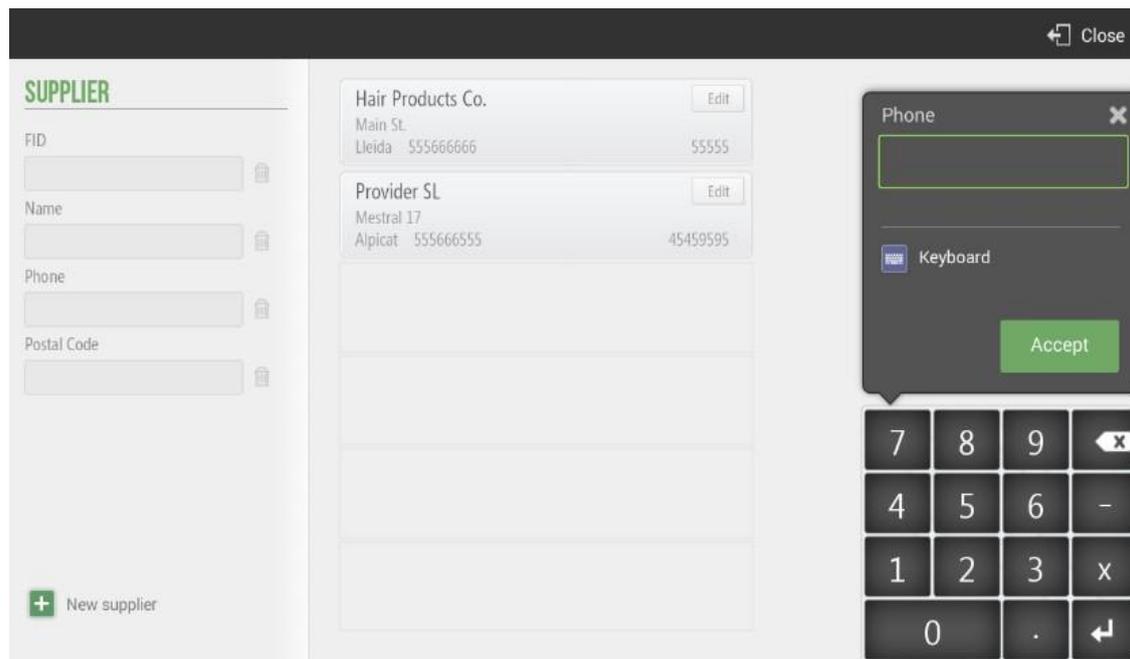
Then enter the data of the supplier.
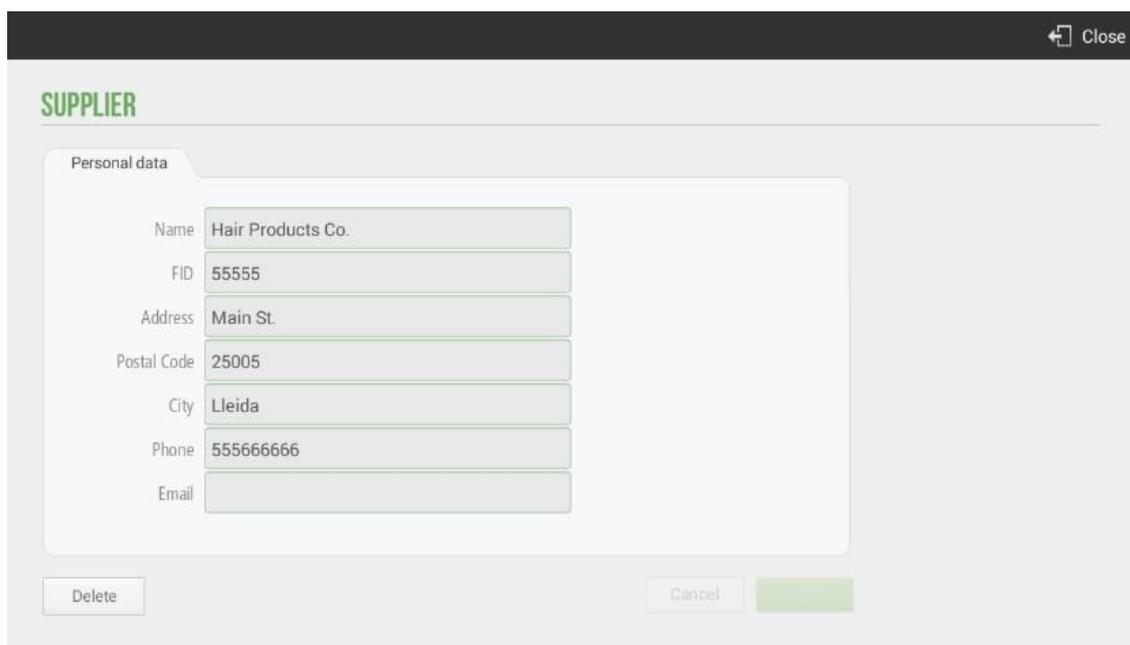
8.4. Labels

HioPOS Cloud allows the printing of labels of the whole range of articles configured by the customer.

This functionality can be very useful when the establishment wants to label packaging with the product already packaged. Essentially, the information contained in the Tags is as follows; Type of article, the number of articles contained and the price.
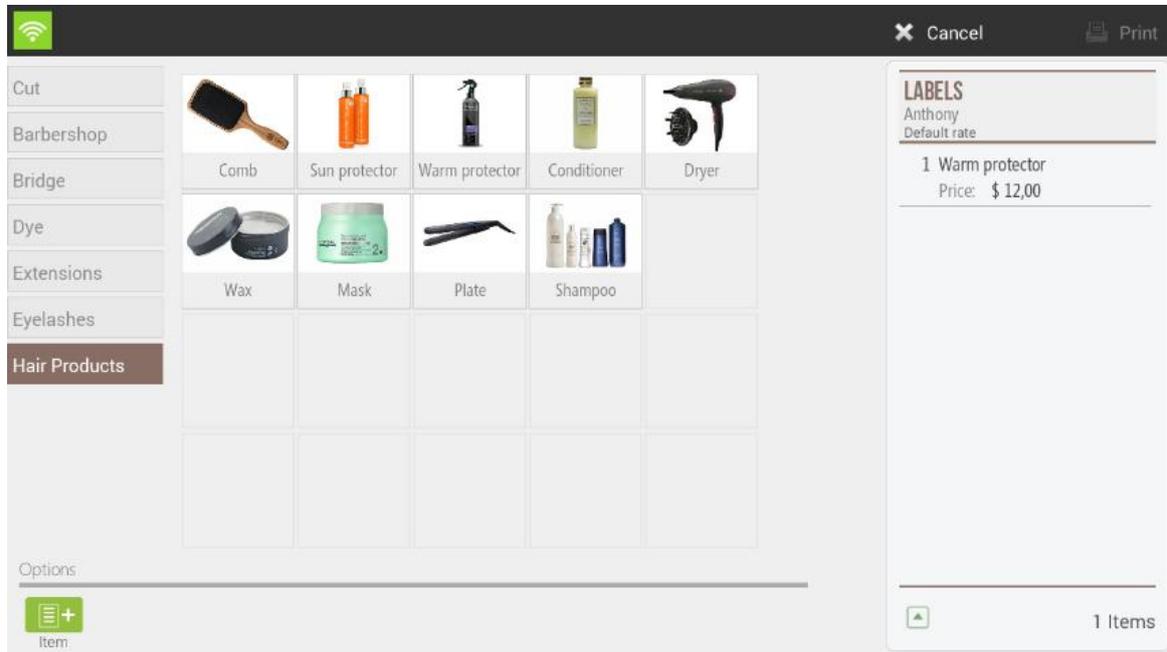
To expedite the method of selection of articles, the application has the functionality; Search by reference - in the lower right margin - by which the user can search the article for the reference number of the same. There is the possibility of making a selection of articles by list using the *Item* functionality in the lower left margin of the application.
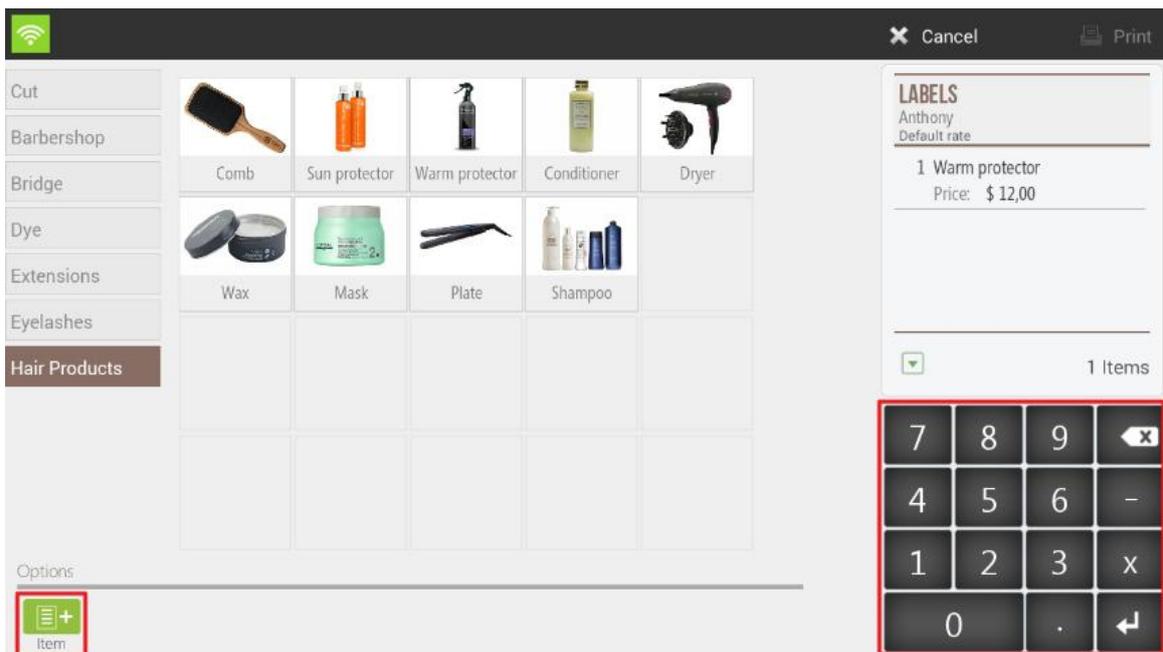
8.1.3. Item Labels

HioPOS Cloud allows the maintenance of the tags by articles, to configure it you will go to *Configuration*, *Item Labels*.

In the configuration of labels, you will see the 3 types of tags configured by default; Offer, With price and Without price.

Once inside the screen you will have three options, modify an existing label; Create a new label or modify the prefix in the EAN 13 barcode numbering. In certain cases, where the articles do not incorporate a bar code, you can configure the creation of bar codes of automatic generation. In these, you can modify the prefix.
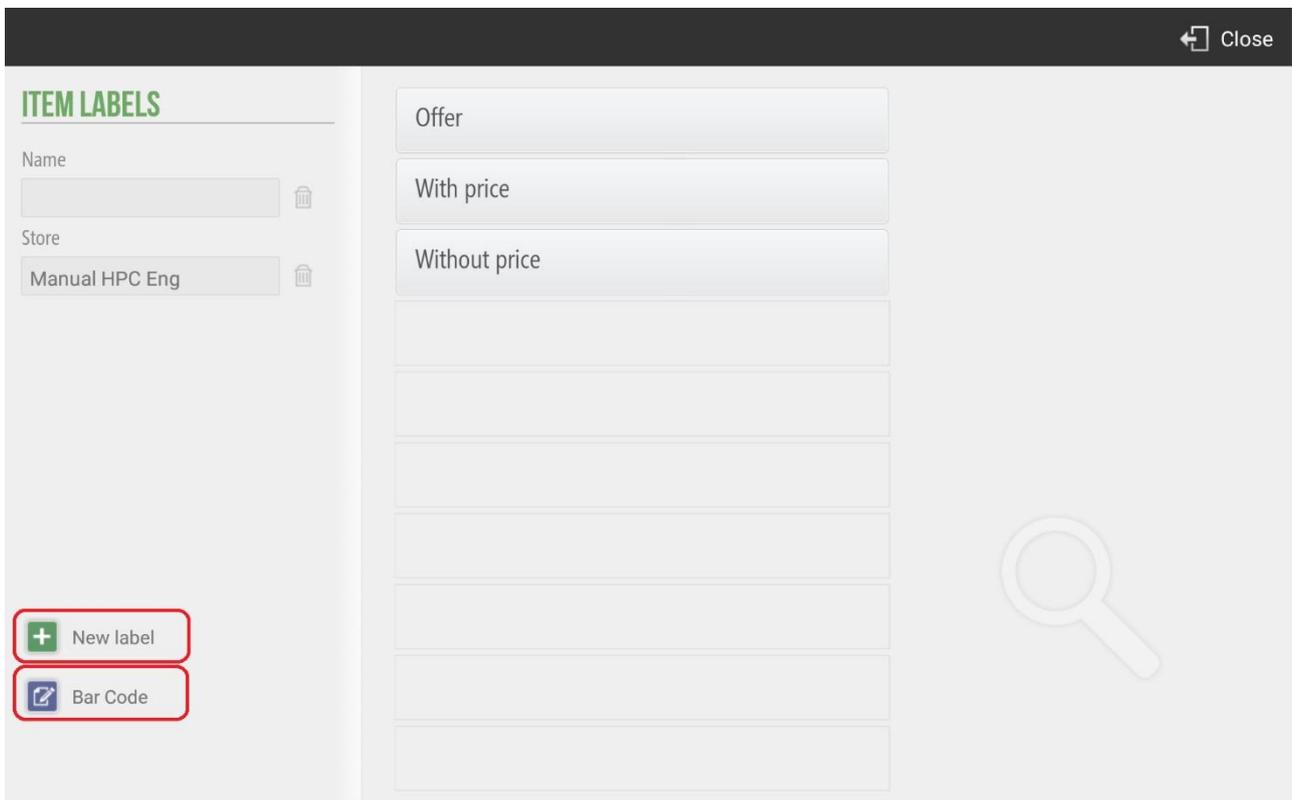
HioPOS Cloud allows a multitude of functionalities at the moment of configuring the design of a label. You can customize with absolute leeway. The functionality allows you to modify information fields of the Label itself and edit the layout of the fields that will be printed later.

You will set the label accordingly; Name, Left edge, Top edge, edge Right, Inferior edge, Paper width and height. General concepts of the label.

You will configure the preview of the tag and add the following fields; Free text field, Mailing, Item name, Item price, Promotion price, offer start date, Offer end date, Item barcode and Image of the item.

The tag configuration tool allows the pre-visualization of all previously commented fields in an image that will be updated in parallel to the modifications. By dragging these fields, the user can organize their label.
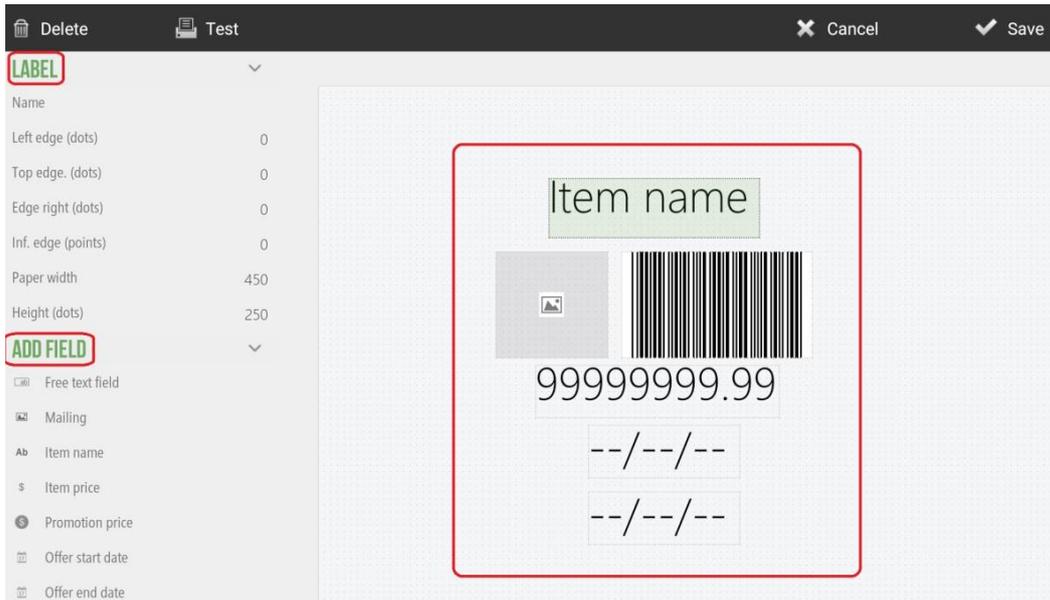
HioPOS Cloud also allows you to modify the prefix in the EAN 13 Barcode Generation. As previously mentioned, the EAN 13 Barcode Generation will be done automatically in those cases in which the article does not have its own bar code. You can modify the second digit of the prefix, changing the coding in the generation of bar codes.
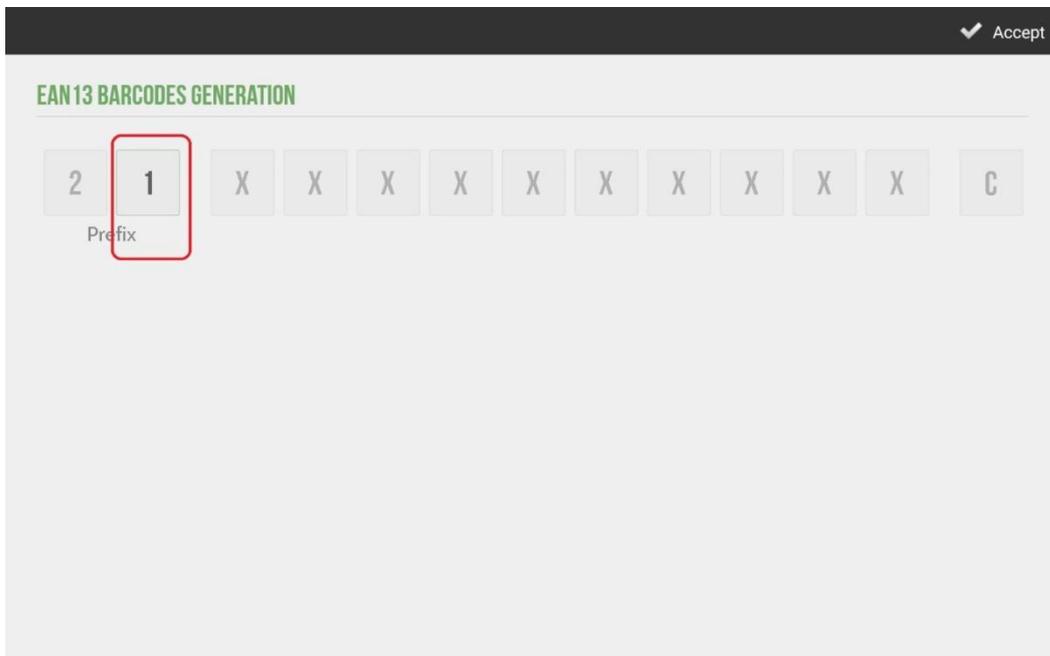
8.5. Devices

HioPOS Cloud can work with up to five different external hardware devices. These are, Printer, Cash Drawer, Scanner, Display and Card Reader. They can be configured from the *Devices* option in the *Configuration* menu.
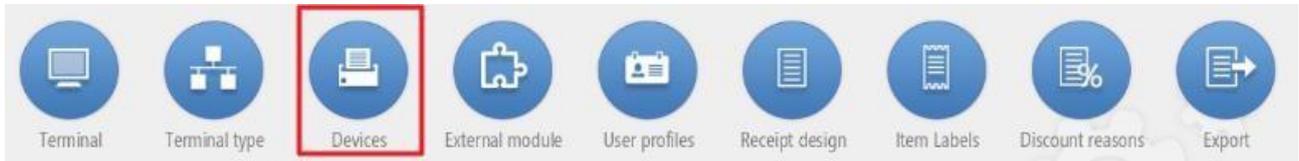
The main technical specifications of the configuration of the *Devices* are detailed below.

Once you have configured each device, press Test to test it and verify that it works correctly.

Depending on the device you are configuring, and the characteristics of your terminal, you can select from different connections (Local Network, Bluetooth, USB Port, Connected to the Printer, Keyboard simulation, Audio Port and Serial Port).

If you want to change the device settings or add a new device, you can do so in the *Devices* section of the *Configuration* screen.

8.5.1. Printer

The printer you set here will be the default printer that the terminal will use for ticket printing.

HioPOS Cloud works properly with most ticketing printers that are compatible with ESC / POS. You can also set the number of columns in the printer. The most normal is 42.

Then select the type of connection. You can work in Local Network, with Bluetooth, with USB Port and Serial Port.

If the printer is Ethernet, select Local Network and enter the IP address of the printer. By default, the port should be 9100.

If the printer is Wife, select Local Network in Connection. In this case, it must be taken into account that both the printer and the POS terminal must be connected to the same Wi-Fi network. Enter the IP address and port of the printer. Press *Test* to verify its operation.

Selecting the *Bluetooth Connection,* you have to take into account that the printer has to be connected from the beginning with the Android operating system. To do this go to the Android settings section and in the Bluetooth sub-section select the printer. Once connected correctly you will return to HioPOS Cloud and select the *Device* that will already be proposed to us automatically. Press *Test* to verify its operation.

 If you select the type of connection by USB Port, you need to have the printer connected to the USB port of the point of sale terminal or tablet. In the *Device* tab, you select the port that HioPOS Cloud will propose by default. Press *Test* to verify its operation.

8.5.2.   Cash drawer

At *Devices* options we can set up the connection of the Cash Drawer. It can be connected through the receipt printer or directly to the POS.
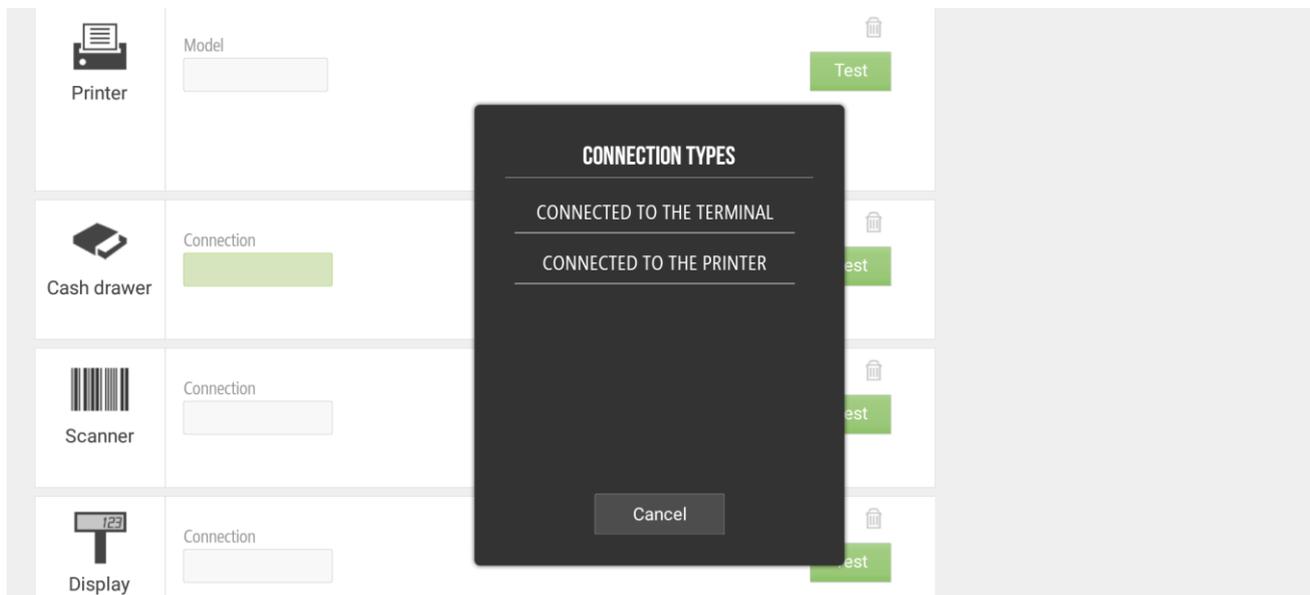
8.5.3. Scanner

The scanner, or barcode reader, can be used in three different ways: via Bluetooth, via USB Port or via Keyboard Input.

Selecting the *Bluetooth Connection,* you have to keep in mind that the scanner has to be connected from the beginning with the Android operating system. To do this go to the Android settings section and in the Bluetooth sub-section select the scanner. Once connected correctly you will return to HioPOS Cloud and select the *Device* that will already be proposed to us automatically. Press *Test* to verify its operation.
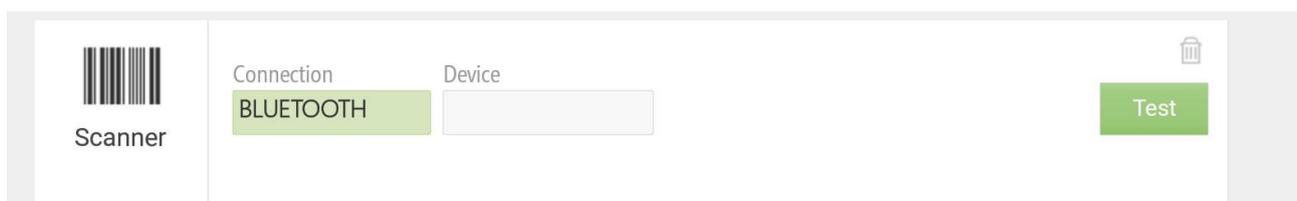
If you select the type of connection by USB port w you, we need to have the scanner connected to the USB port of the point of sale terminal. In the *Device* box select the port that will already be proposed by default HioPOS Cloud. Press *Test* to verify its operation.
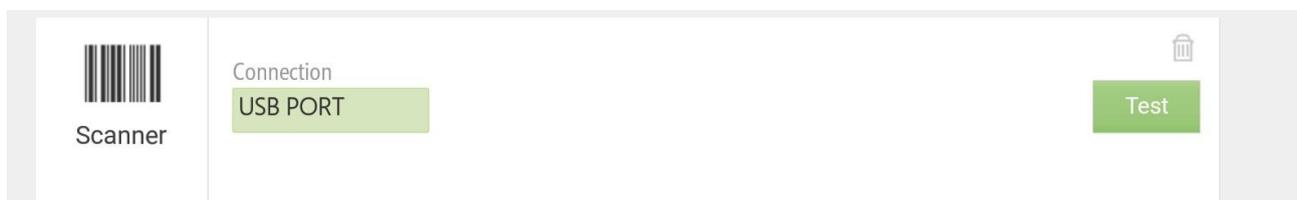
The keyboard input does not require any device connected to the point of sale. Simply enter the product barcode on the numeric keypad of the sales screen, then press Enter. HioPOS Cloud will introduce the item in the sale ticket.

It is possible that by connecting the barcode reader to the terminal, the Android keyboard will be disabled. In this case, you must go to the *Settings* of the Android terminal, *Language* and *text input*, in the *Keyboard and methods of introduction* section: *Current keyboard*, you must activate the Hardware option: *show input methods.*

8.5.4. Display

You will select the model of the client viewer, as well as the type of configuration that it has.

8.5.5. Card reader

On a tablet, the magnetic stripe reader works by connecting to the audio port. Connect the device to the audio input and select the *Connection*. Press *Test* to check its operation.

8.5.6. Label printer

The label printer you configure here will be the printer that will use the terminal for label printing.

HioPOS Cloud works well with most EPL or ZPL compliant label printers. *Connection* can be made via local network, Bluetooth, USB port or Serial port.

8.5.7. CashDro

HioPOS Cloud allows you to link to CashDro as a means of payment, of cash origin.

CashDro is the cash drawer that always balances and its main characteristics are the following; It is the safest in the market in its segment, it works with one or several TPV's, tablets or Smartphone, it is easy to link with any point-of-sale and platform software (Windows, Linux, Android and IOS), and can be managed autonomously without being connected to a PC or POS.

To configure the link of the HioPOS Cloud with the CashDro, you will select *Configuration*, *Terminal* and you will be placed in the bottom margin of the screen, where you appear the option CashDro.

To link the device, select the option *add*.

In the configuration screen that will open us, you will have to inform the IP address of the CashDro that you want to link to, you will give it a name and you will have to inform the user and the password of the device. At this moment you will see a couple of dropdowns on the terminal administrator and the seller.

HioPOS Cloud allows us, through the link with CashDro, to record all the cash movements made with the device and to be able to count them to the HioPOS Cloud terminal through the Cash drawer control. If you want the movements of cash-ins and cash-outs effected with CashDro have implications and you registered in HioPOS Cloud, you can link the Terminal Administrator - *for example*; POS1- and the seller.

At this time, you will see the IP address in the lower margin of the *Configuration* screen, *Terminal* seen before.

When the terminal is synchronized, in the Administration section you will see a new functionality: CashDro. By selecting it you will connect directly to the device.

Through connection with CashDro you can perform many operations, make consults, configure the device itself and close the session (for authorized users).
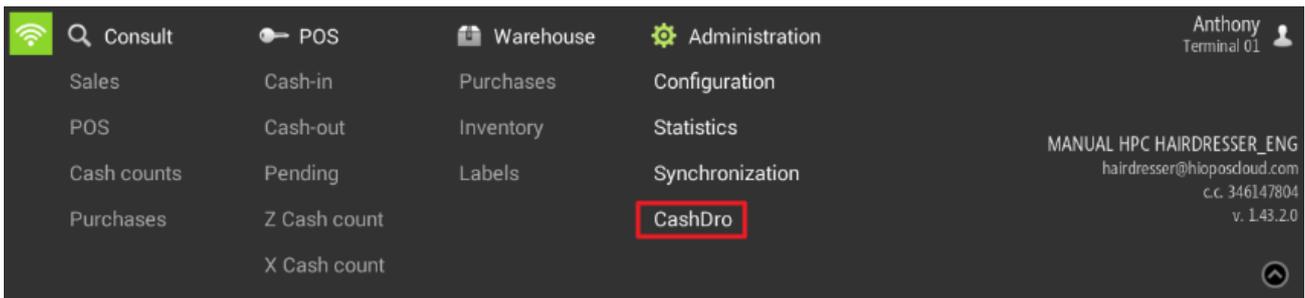
The CashDro screen appear when selecting the option from the HioPOS Cloud terminal. For more information regarding the operation of the cash manager itself, please consult manuals related to its functionalities.
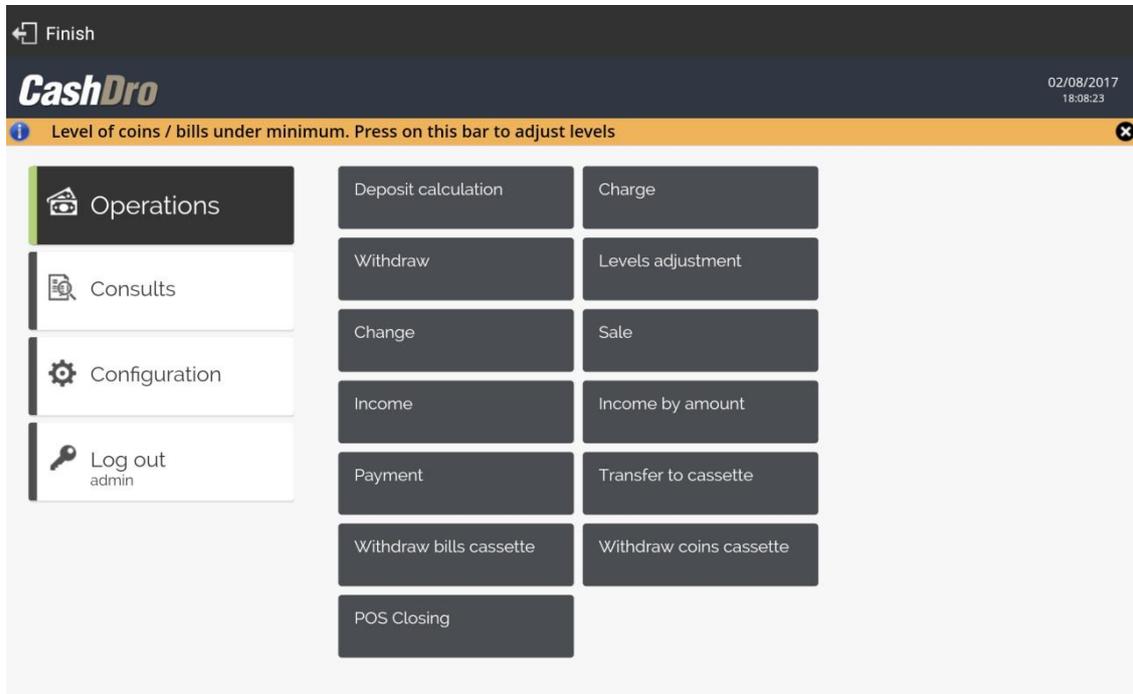
9. Rates and offers

In the *Configuration* menu, there is the *Rates* option, which shows the articles according to their price and family rates, as well as allows us to also make offers on the price of the items for a certain period of time.
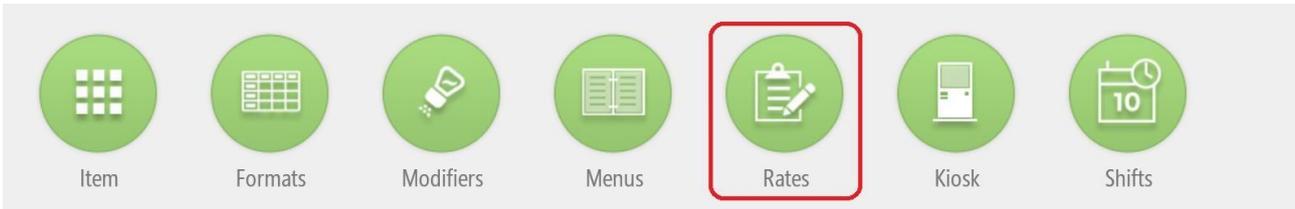
9.1. Creating new prices rates

Go to the *Rates* menu and choose *New Rate*.

When we are creating a new rate we will watch de following image showing the *Origin* and we will be able to configure an *Increase percentage* and *Increase amount.* Those values can be positive or negative.

You will see all items by families. Enter the *Name* of the new rate in the top menu and select whether the prices include taxes included or not. Also in the same level you can select the family of the articles that will be shown below.

Enter a price for each item. If several items carry the same price, you can select the boxes at the beginning of the line of each item and then click on the price box, and then add an equal price for all the items you have selected.

9.2. Create a new offer

Offers are created for periods of time when they are going to be active. In the same screen of modification of rates is next to the options of the offer. Select the time in which the offer will be active for the *Promotion Period* boxes.

Once the offer period is selected, you will enter the price that the items will have during that selected time.

If you want to eliminate a rate you will select the *Delete* option from the top menu.

10. Items by size

HioPOS Cloud allows using the *Sizes* option found in *Configuration*.

Working with sizes will allow us to select an item that has assigned sizes, the program will ask to select the format from among those available. It will also be useful for inventory counting and sourcing, as the formats in these modules are also taken into account.

10.1. The creation of sizes

You go to the *Sizes* option in the *Settings* menu, a first screen appears; Size chart. Within this screen you can see the currently existing sizes and you can search them with the tool; *Description*.

If you want to create a new *Table of Sizes*, you will select the New Table option. A *Table of Sizes* screen will appear where you can name the table and add the sizes that you want.
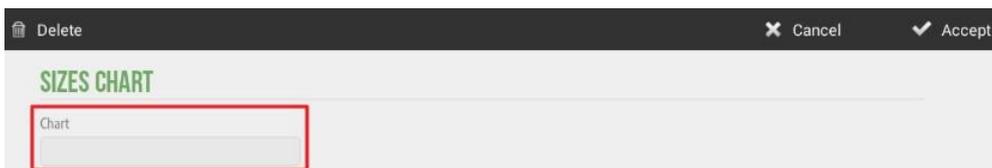
If what you want is to Create New Sizes within a Table of Sizes, you will select the new size option and you will name it.
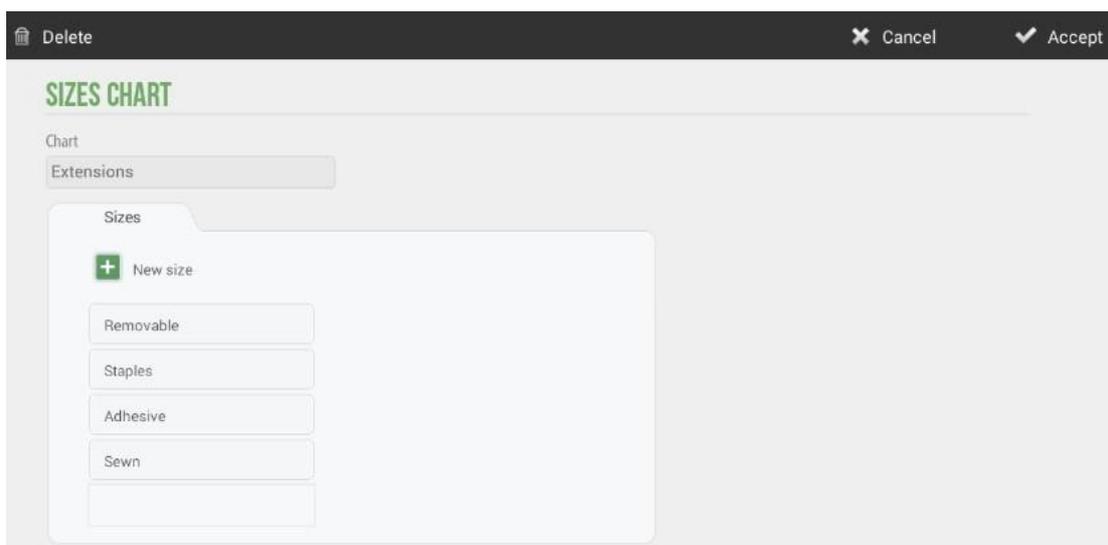
10.2. Assign sizes to an article

You go to the *Item* menu in *Settings*. There we select a family and create a new article, where you will mark the option *Item* with formats at the time of naming the article.

Once the article has been created, select from the *Size Table*, the size that you want to apply, and you can create a new table with new sizes at that moment.
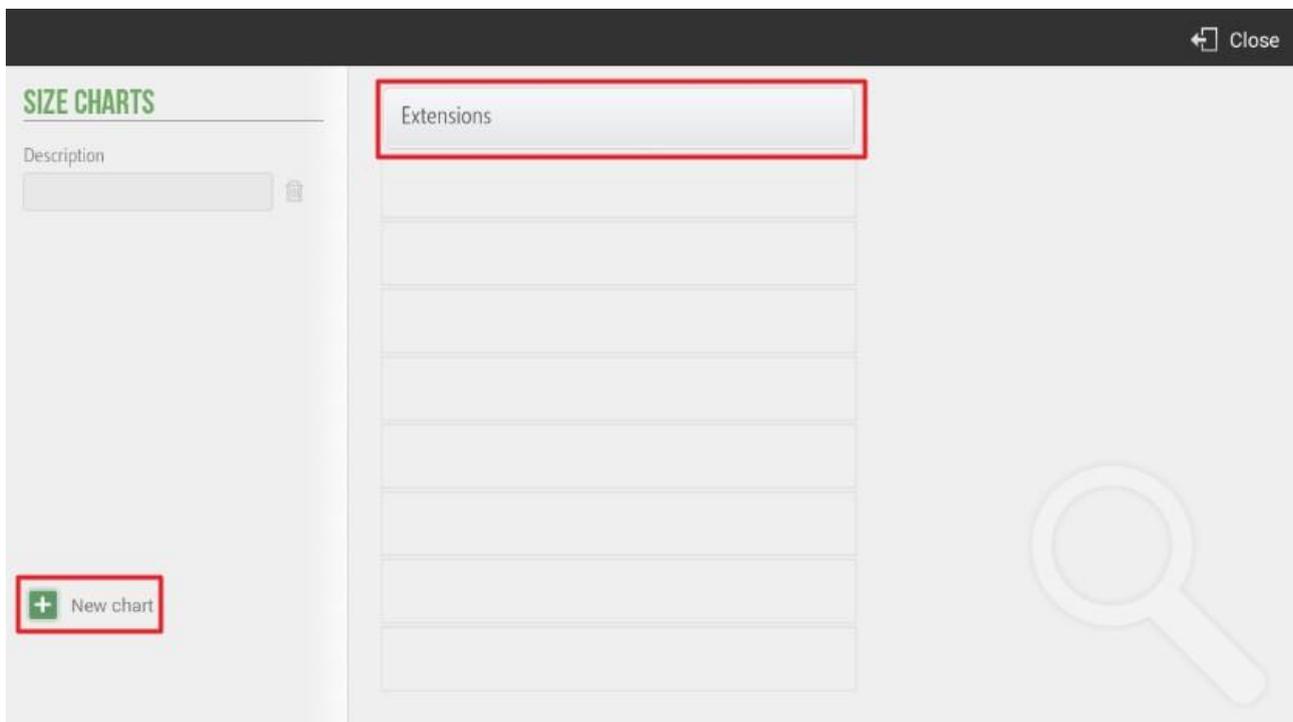
Then enter the price and you will have created a new item by size. When you have created a new item by size, at the end of the line you will see that a box with a table is added, this means that it is an item that is sold by size.

Click on the table to modify the prices according to the size, as well as the cost, the margin, the bar code and the rate, you can also add a new size.

If at the time of creating a new item, you have not selected "Article with sizes", you will have to assign the sizes manually to each article. You will go to the *Settings* screen, select *Item*, Edit articles. You will select in the table that appears almost transparent at the end of the line of an article, and there you can add various formats manually.

10.3. Selling an Item by size

First, you go to the sales screen and select the item to sell.
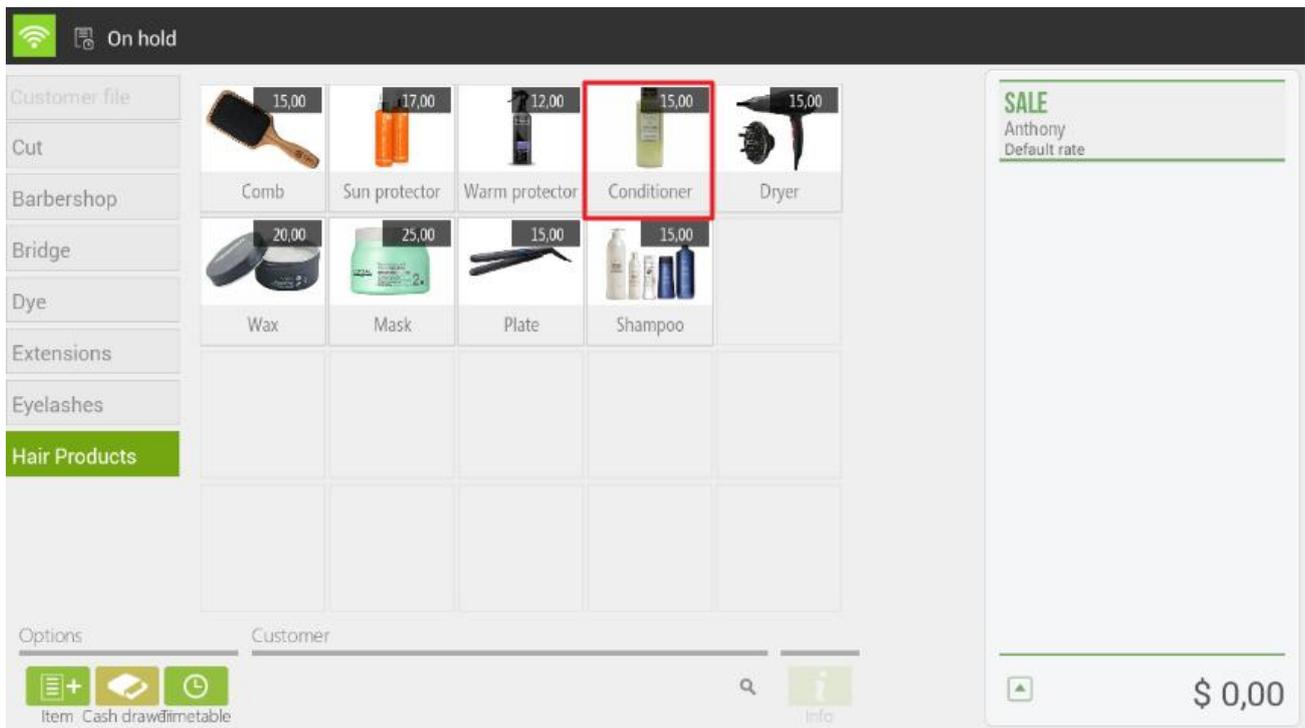
 The same program already detects that it is an article by size and shows us the window to select among the sizes assigned to it.
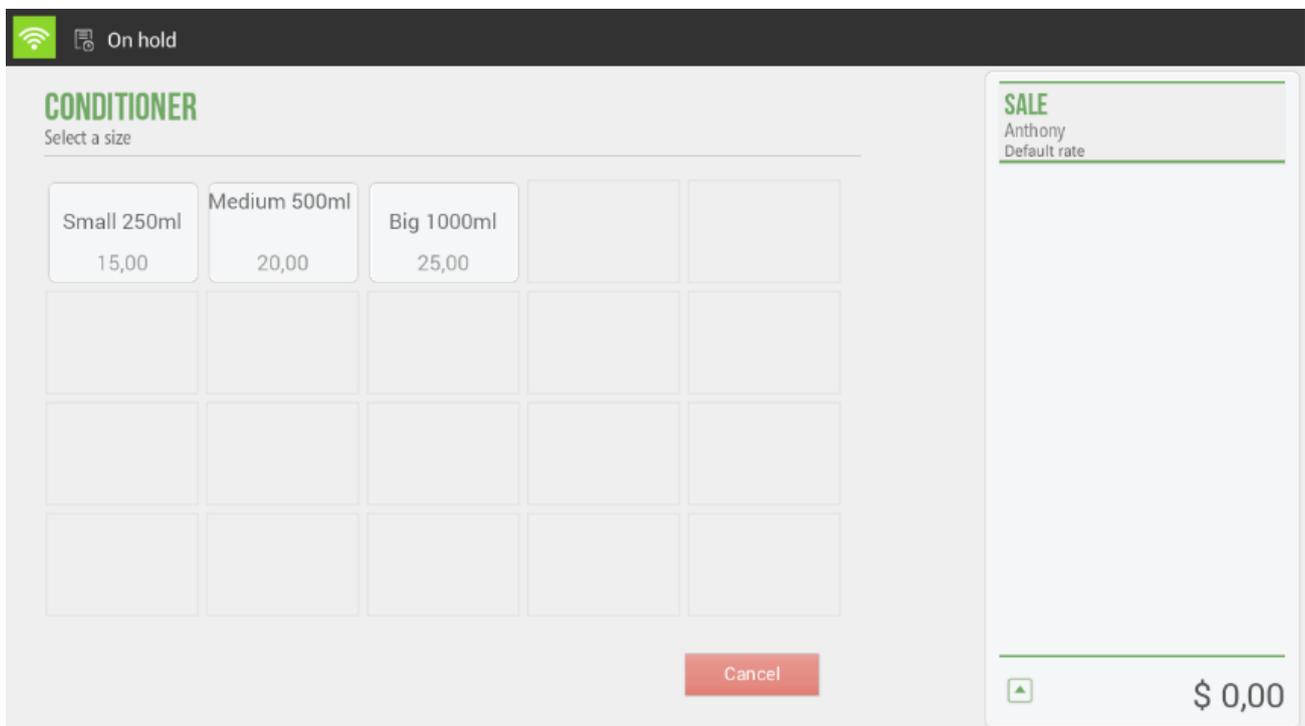
Once the size is selected, the item will appear on the sale ticket, showing the description of the item and the selected size at the end of it. You can continue adding items for sale or end with the usual procedure.

11. Shifts

HioPOS Cloud allows you to use the *Shifts* option in the *Settings* section.

There are four types of configurations depending on the shifts and schedules of the establishment, holidays and exceptions of the establishment, shifts and schedules of employees and holidays and exceptions of employees. This will also be useful for assigning rates according to shift.

11.1. Establishment shifts and schedules

In the first section of *Shifts*, you can configure the shifts and schedules of the establishment. To add new shifts, you will have to select *New* and enter the name you want to give.
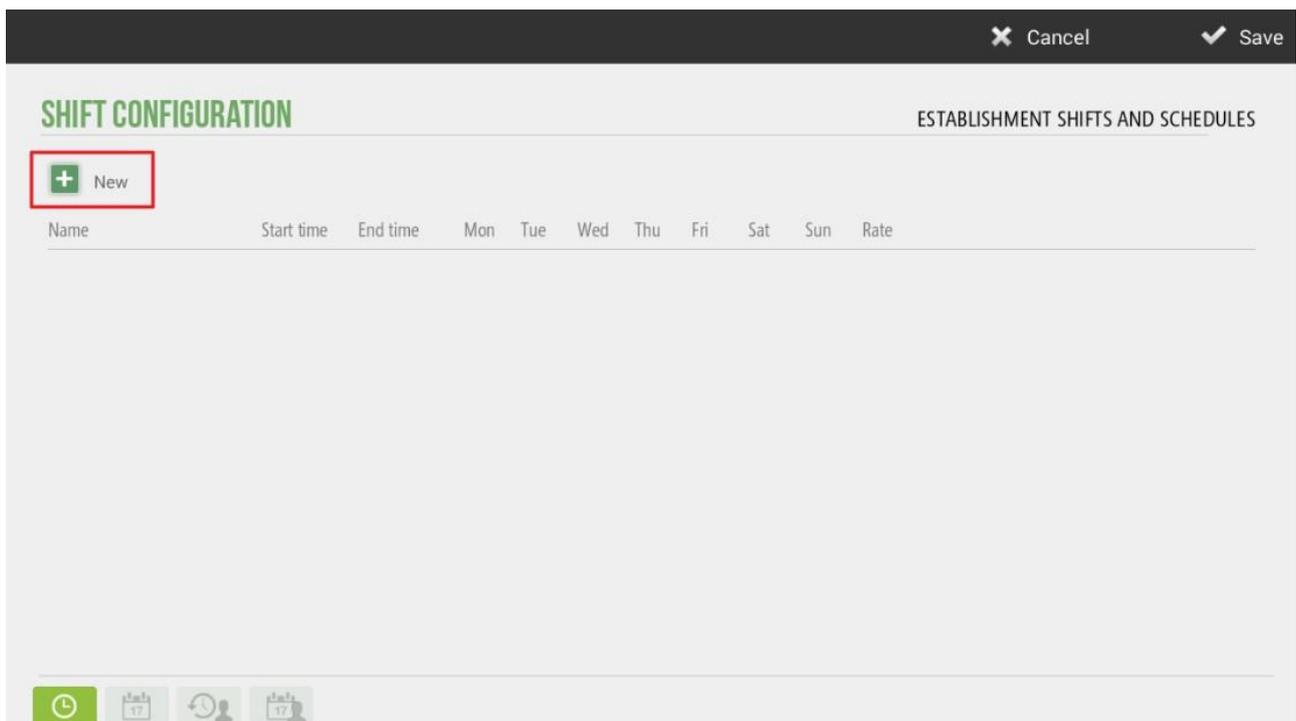
This configuration will be useful for the sales screen, which according to the time set in the terminal as of the day of the week, will be taken the corresponding rate.

For example, in this section you will configure the morning and afternoon shifts with the start and end times and what days of the week will be available. The following image shows an example:

SHIFT CONFIGURATION   ESTABLISHMENT SHIFTS AND SCHEDULES

Name	Start time	End time	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Rate
Morning	09:00	14:30	✓	✓	✓	✓	✓	✓	☐	Default rate
Afternoon	16:30	20:00	✓	✓	✓	✓	✓	☐	☐	Default rate

As you can see, the establishment will work in the morning from Monday to Saturday and in the afternoon, from Monday to Friday. You can select any rate already created; in the example has assigned the default rate to these two shifts.

On the calendar screen it will be displayed as follows:

- On Friday from 8:00 p.m., the establishment will be closed.

- On Saturday the establishment will not remain open.

11.2. Establishment public holidays and exceptions

In this section, you can configure the public holidays of the establishment, taking into account the national, local, regional days... You can also indicate, for example, the holiday period of the establishment, such as the working hours of those days.

This configuration will be very useful in the Hairdressing version, because the holidays or exceptions of the establishment will be painted of another color in the Calendar screen, like days or hours non-workable.

11.3. Sellers shifts

In the third section, *sellers shift*, will take into account the working hours of workers, with the start and end time of their work day, and which days of the week they work.

To add them, select New.

In the previous example, you can see how the employee Arnold Cross works from Monday to Friday from 09:30 to 14:00, having Saturday and Sunday free. In the case of Lara Gibson, as she has two shifts and a split day, she must create with two different lines.

These shifts will be displayed on the Calendar screen, in order to see which days or hours each employee works, marking the non-working shifts in gray.

11.4. Seller public holidays and exceptions

In the last section of the *Shifts*, will be configured the public holidays or exceptions of the employees, such as, their vacation periods or personal days, in which they will not attend their usual working day.

To configure them, select *New*.

In the image above, you can see that Arnold Cross will not work during the month of July and on September 28 will work alone in the morning for some specific reason. While, employee Kelly Bolton will have vacations during the month of August.

This configuration will be very useful in the Hairdressing version, because the employees' nonworking days will be displayed in the Calendar screen.

12. Statistics

HioPOS Cloud includes a complete collection of dashboards and reports. Access them from the *Administration*, *Statistics* option.
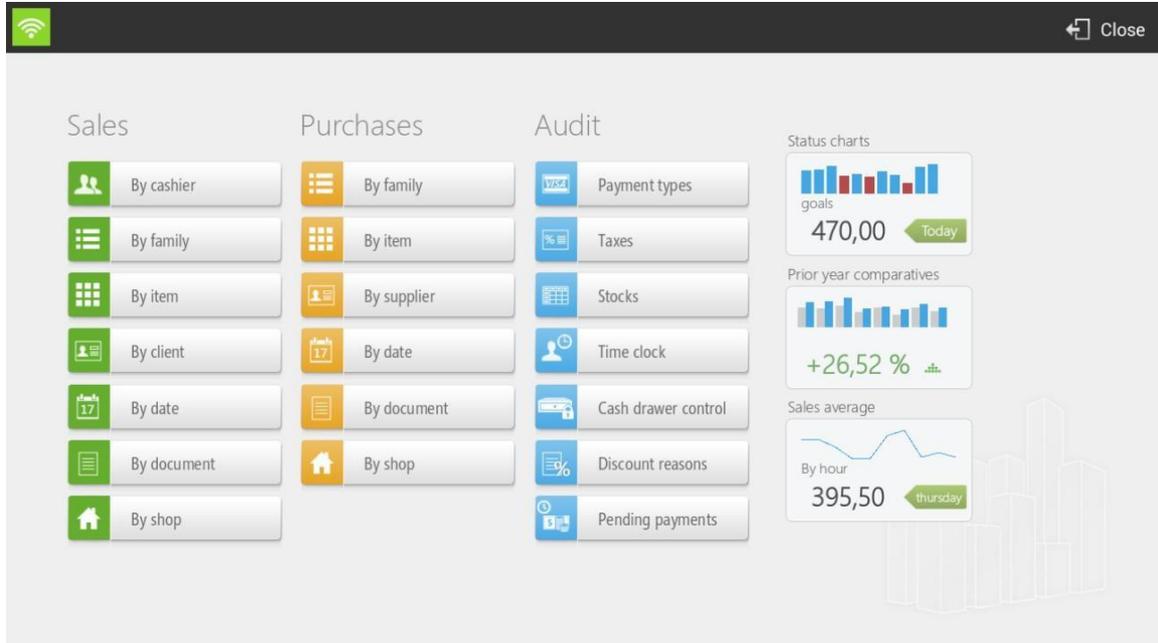
All reports are displayed on the screen. Select the date range with the Day, Week and Current Month buttons or make an advanced filter by shop, POS, cash count, client, family or item with the Filters button. Select a line and drill into another dimension.
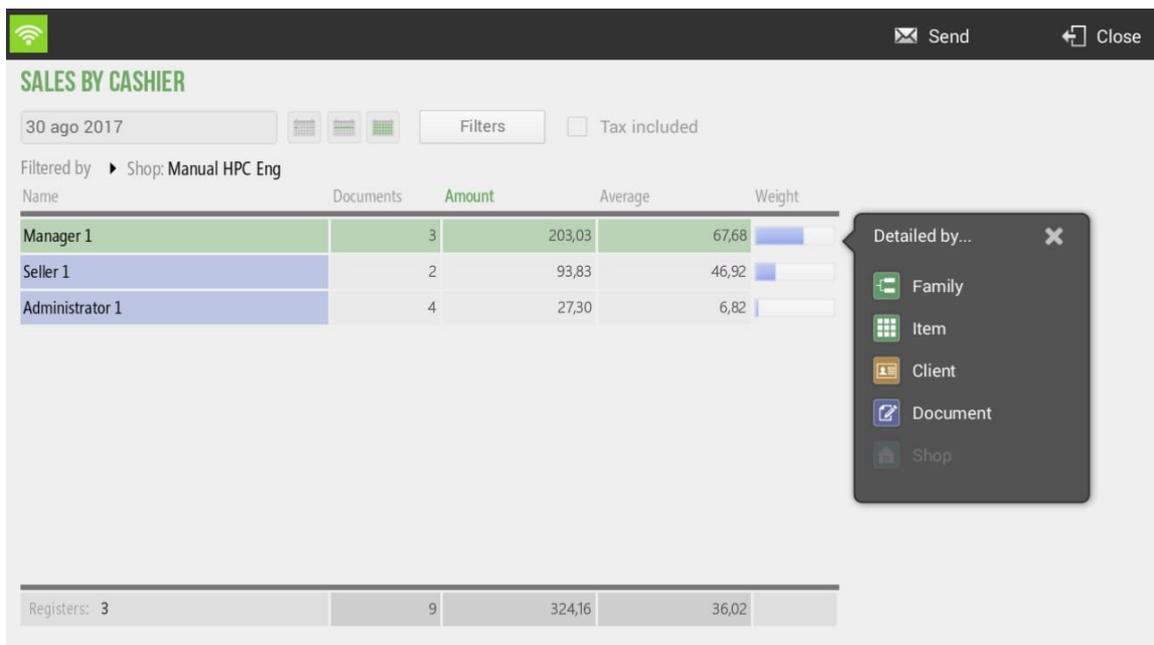
HioPOS Cloud also includes dashboards, to analyze data quickly and visually. Select from the statistics menu among the three available.

All reports can be sent by email by selecting the Send button at the top right. It can only be sent to an email; so, if you wanted to send to different people, you would have to add the emails one by one.

12.1. Status chart

Status charts include general transaction information to give you an overall impression of how the business is at all times.
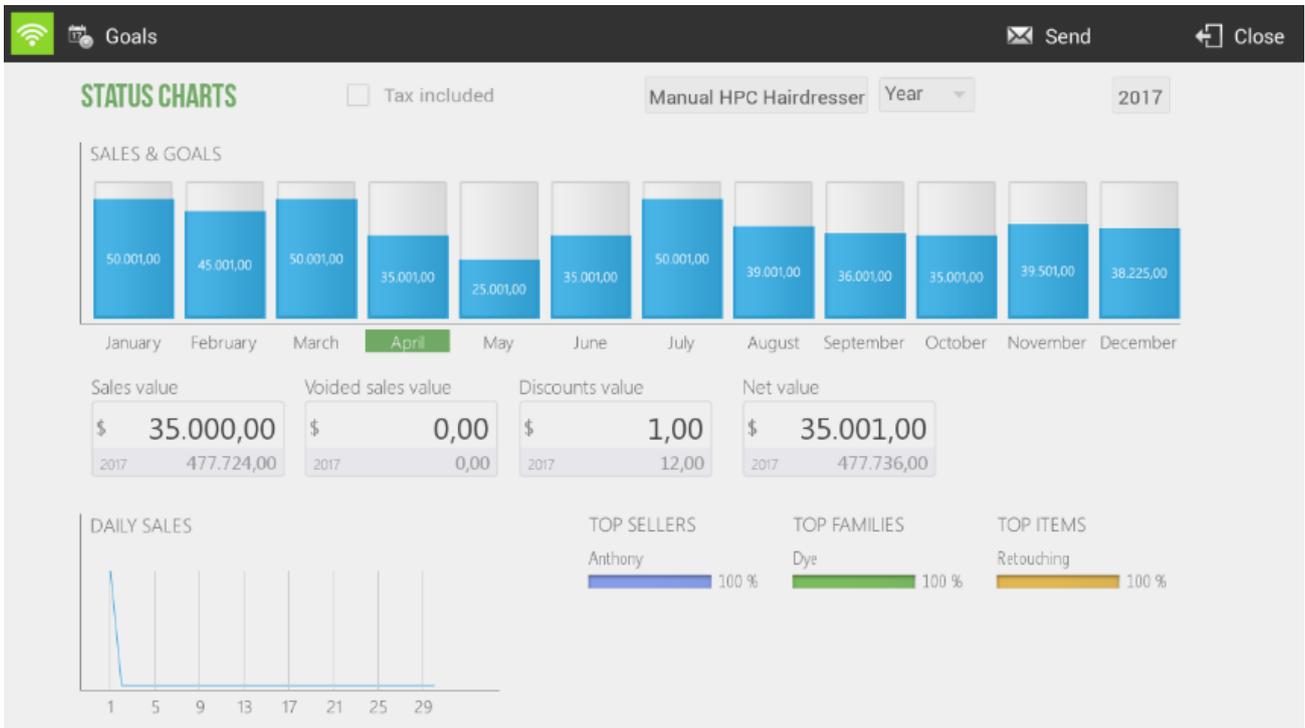
At the top you will find the filter options for a more personalized result. You can see the values with or without taxes, select the shop that you want to display and the year.
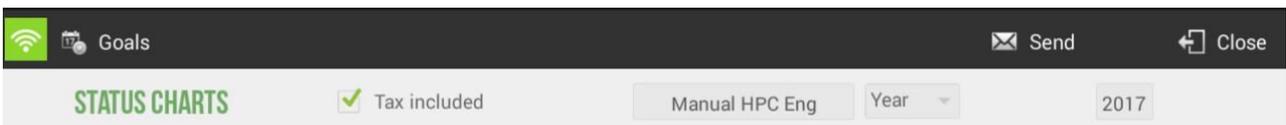
Also at the top is the Objectives option, where you can mark sales goals that will be represented in the status charts, allowing a visual and quick comparison.

The objective control shows in visual cube format the value of total monthly sales, together with the quantity in figures and the line that indicates, for each month, the value that has been marked as objective.
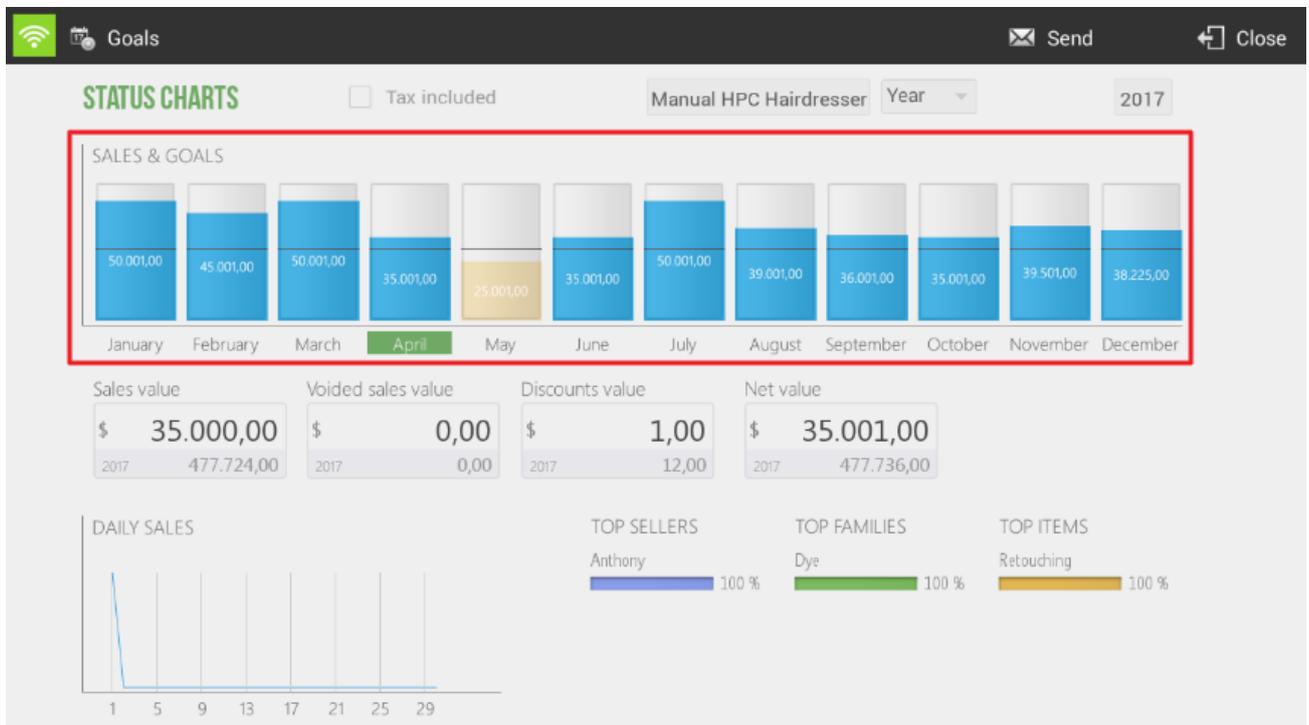
Under the status charts are the total values of the Sales Value, Voided sales value, Discounts Value and Net Value.

The daily sales chart shows a representation of sales totals for the selected month. On the side are, with their percentages on the total, *Top Sellers*, *Top Families* and *Top Items*.
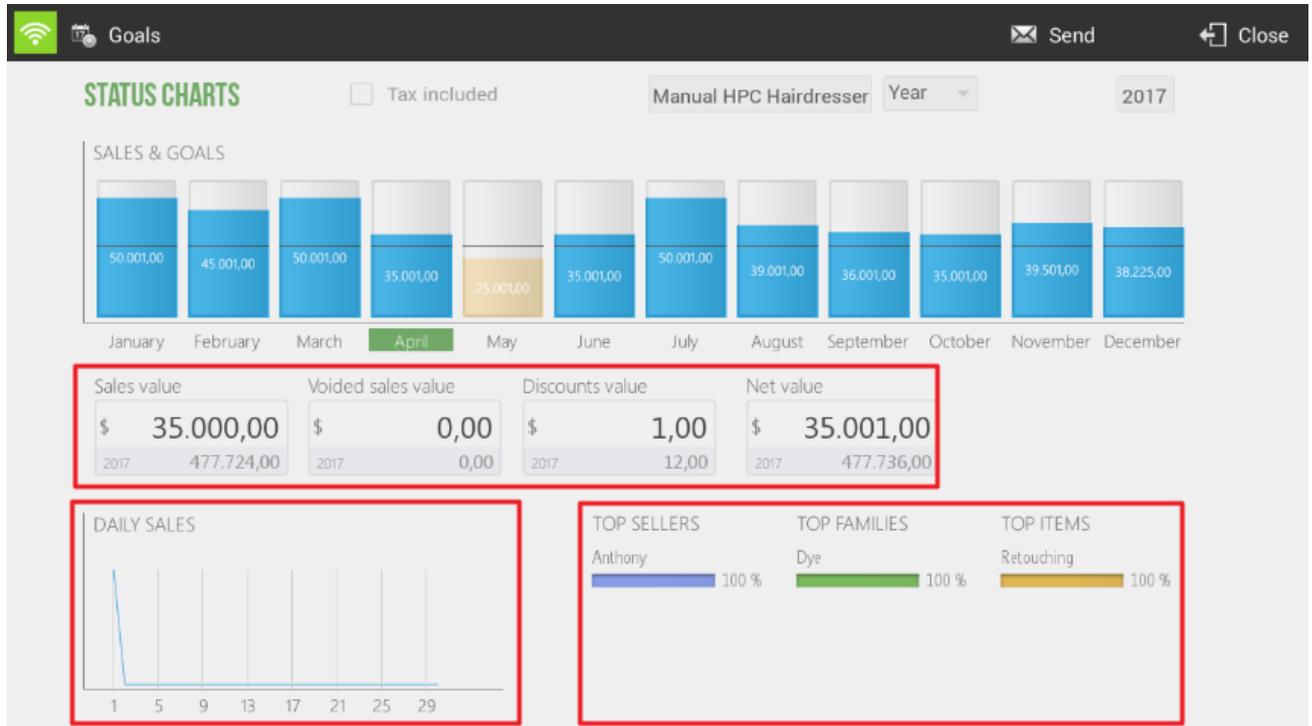
12.2. Prior year comparatives

This statistical module offers to compare a year with the previous one.
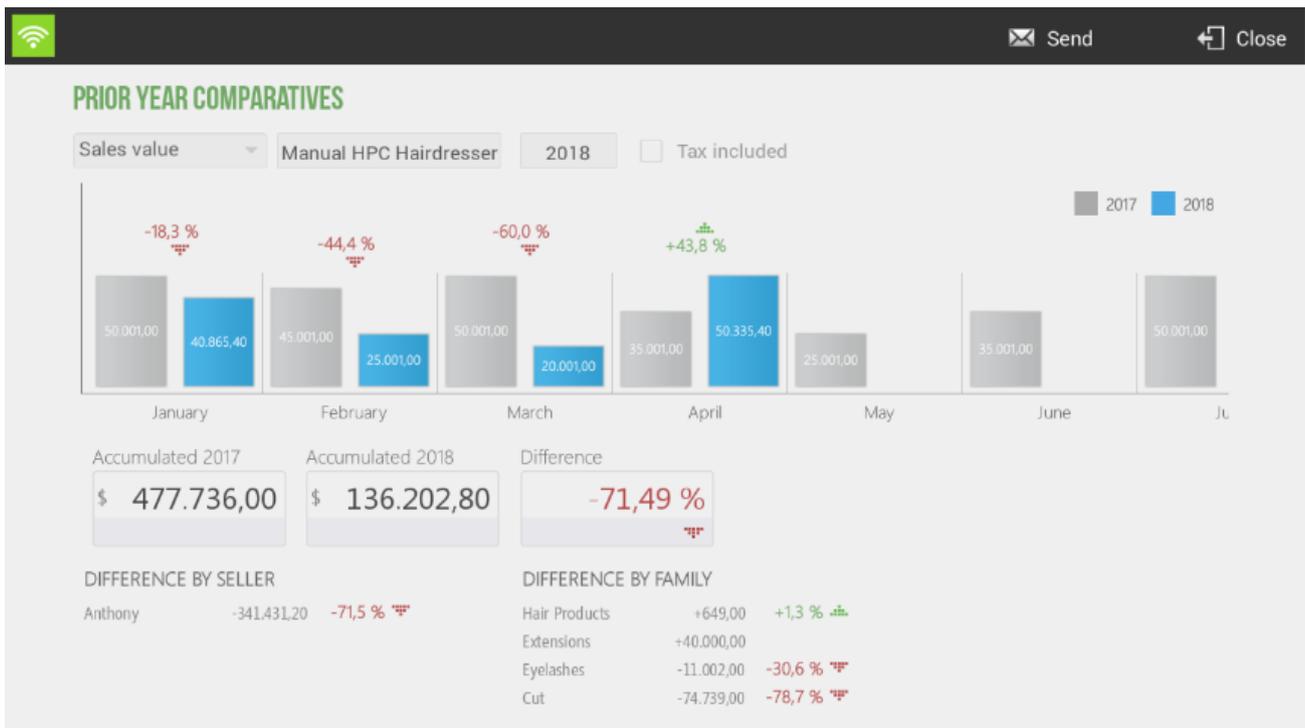
Select in the top menu if you want to display the data by *Sales Value*, by *Sales Volume* or by *Average Sales*. You can also select the store you want to display and whether they will be displayed with *Taxes included* or not. In the box where the current year is displayed, select the year that you want to be displayed, the comparison will be made between the selected year and the year before that year.

The bar chart shows in blue the selected year and in gray the previous year, offering a visual comparison according to the size of the same, as well as the value in figures of each one. Between two bar charts of the same month appears the percentage of variation that has happened between one year and the other.

Just below is the total of the years and the variation on the total. There are also the *Difference by seller* and the *Difference by family* this year.
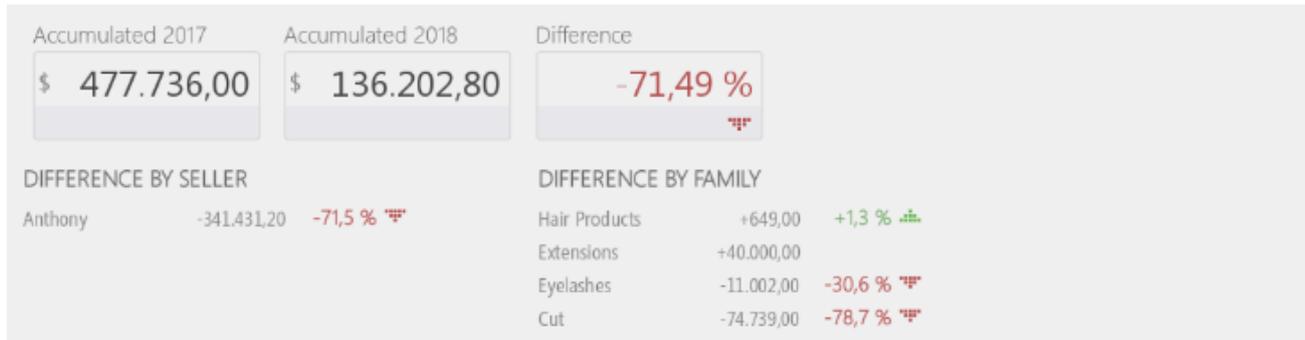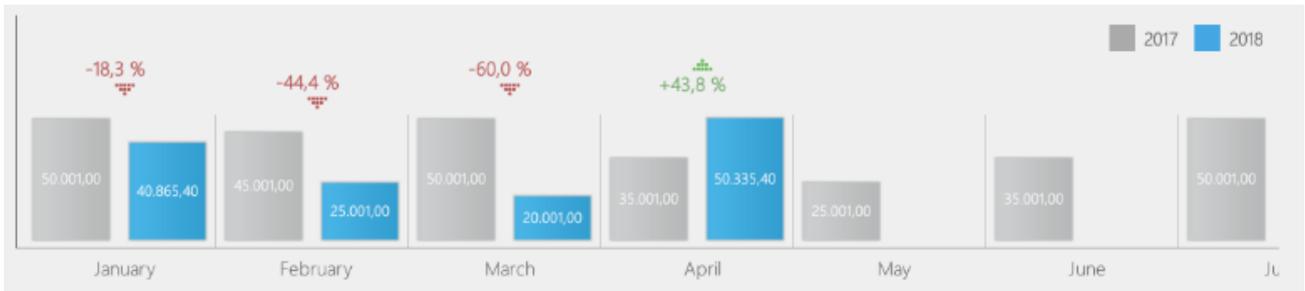
12.3. Average sales

The analysis of average sales is done by hours and days of the week.

From the top menu you can select a period of free time or one of the three options that are the current day, the current week or the current month. Also select whether the values will include taxes or not, and if you want to display the graph in bars or lines.
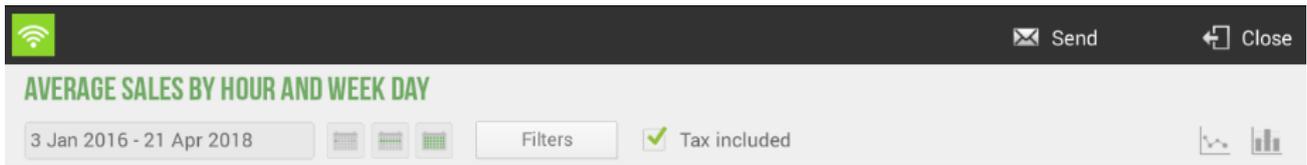
The *Filters button*, also in the top menu will allow us to view the data by *Shop* and by *Seller*.
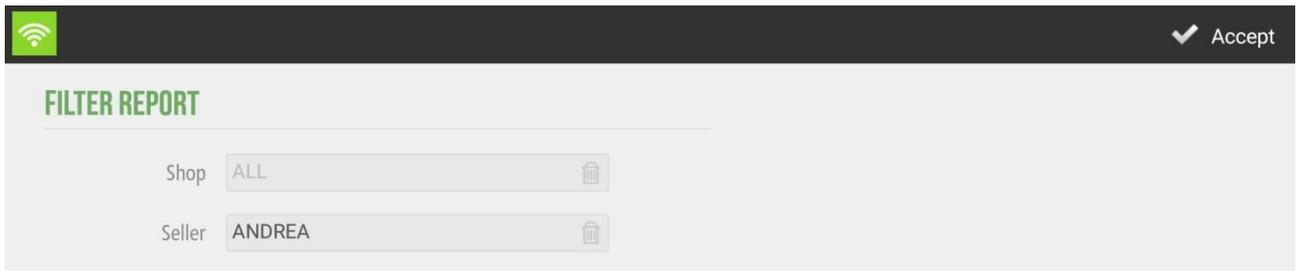
The first chart shows sales by hourly stretches of 15 minutes. HioPOS Cloud analyses all sales for the selected period and divides them by the number of days, and then displays an average of the period on the screen.

Bottom bar charts show the average sales per day of the week. They are made according to the number of equal days selected.

13. Advanced Options

13.1. Setting Up a Pin-Pad

The Pin-Pad is an electronic collection device that provides financial institutions and banks to make payments by credit card (the operation may be different depending on the country).
The HioPOS Cloud app supports these devices, but in some cases you need to do a previous integration.

In the top menu you go to *Administration>Configuration>Electronic payment* and thus you are able to enter in panel of configuration of the Pin-Pad. In case of not being able to access this menu we would have to make sure that you have entered with the administrator user. +

In the menu of *Electronic Payment,* you select the parameters pertinent to the Pin-Pad. This can work by Bluetooth connection or by USB connection; both cases involve accepting the connection from Android.

- USB connection: when selecting USB Android will ask permission to connect to the device, you have to accept.
- Bluetooth connection: In the case of Bluetooth connection, you first have to connect to the Pin-Pad device from the Android system's own configuration, then you will select in the HioPOS Cloud application the Bluetooth connection and the device name as shown in the image.

The following data must be configured in accordance with the specifications provided by the provider of the Pin-Pad. If you have followed these steps successfully you already have our electronic payment device set up. These parameters are provided by your bank.

ELECTRONIC PAYMENT   Redsys

Connection   Device (Bluetooth)
BLUETOOTH   614008092   ☐ Habilitar login transparente

User
336467154

Business code   Terminal number
336467154   3

Enter tip
Never

In the CloudLicense license portal, in the terminal edition, the following parameters must be configured:

13.2. Data Export

HioPOS Cloud allows you to export sales data, items and clients by e-mail in CSV or XML format, exporting articles HioPOS Cloud allows exporting them with CSV Simple file, to facilitate and make more intuitive data processing for the final user. To do this, go to the section *Export* on the *Configuration* screen.
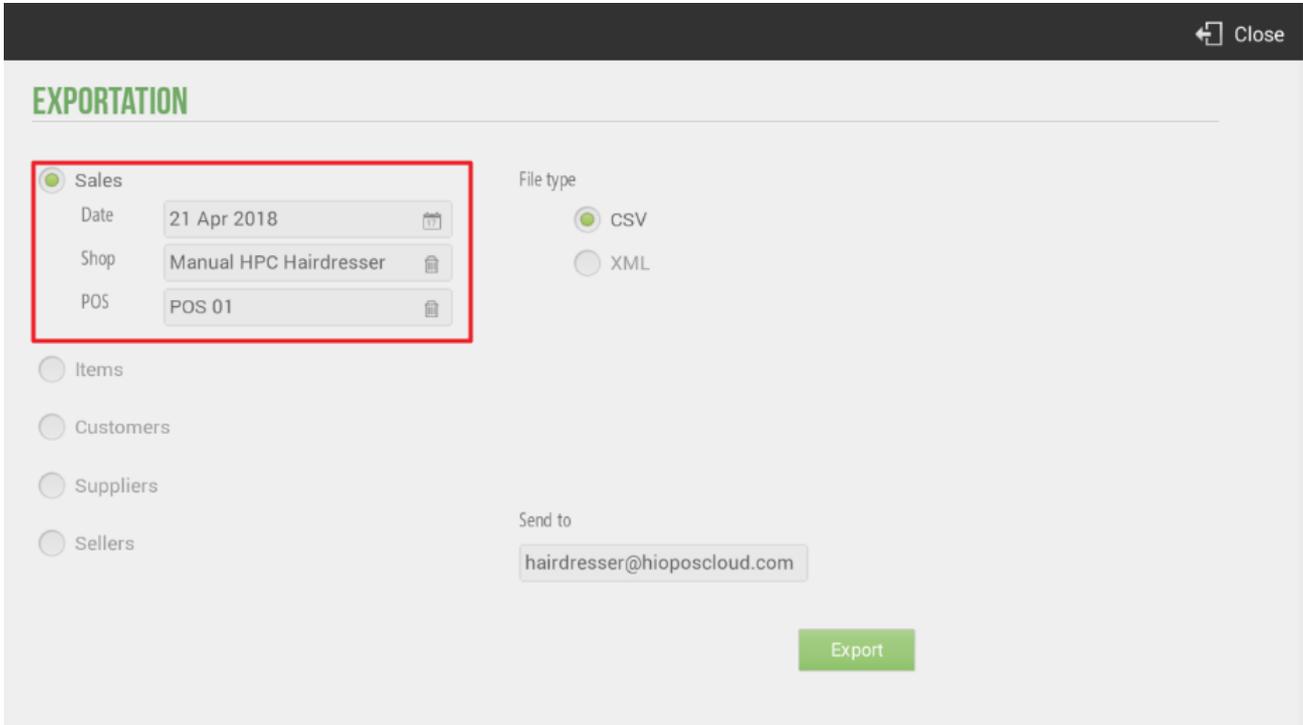
If you want to contract the periodic and automated export of sales data for later import into your ERP or other data exploitation system, contact your distributor.

HioPOS Cloud allows you to export sales by filtering by date, store and box. In the exports of sales, customers, suppliers and sellers you can select if you want to export it in a *CSV* file or with an *XML* file.

HioPOS Cloud also allows you to export the articles in the *CSV Simple* file type. This type of file allows the client a greater compression of the exported data. The data exported through a *Simple CSV* is focused on the end user. To export the articles with this file you will simply have to select this option among the different alternatives that the application poses to us.

The file is sent by email; this will be the default user input to the application. But it can be changed to make a specific mailing; if you would like to change permanently, you should contact your dealer to make the change.

If are looking to contract the periodic and automated export of sales data for later import into your ERP or other data exploitation system, contact your distributor.

13.3. Multi-store configuration

To access the configuration options of the store where the terminal is working go to the *Administration* tab and then select *Configuration*. In the Configuration menu, go to *Shops.*
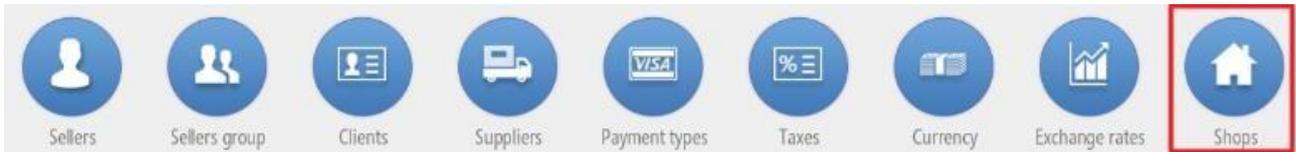
Within the parameters that you can configure are those that you added during the installation process, click the *Edit* button next to the name of the store.
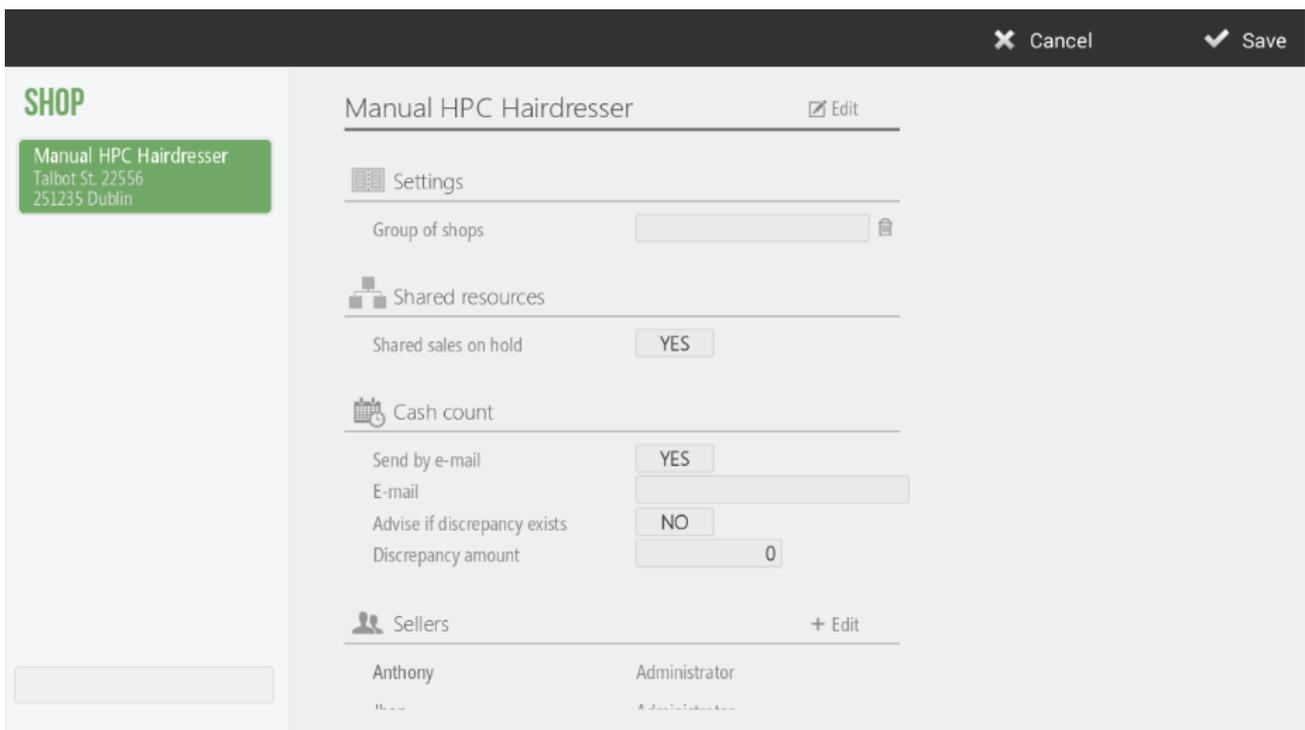
S*ettings* allow you to select the group of shops on which the changes you make will take effect. Grouping the shops by groups will help you in creating user profiles, since in that section you can select which shop has access to that profile: Seller's shop, the seller's shop group or all stores. This option is favorable for businesses as franchises.

The *Shared Resources* option allows you to share data such as sales on hold, between terminals on the same local network. If the establishment only has a terminal, it is recommended to have this option disabled; however, if you have more than one, it is recommended that you have it activated.
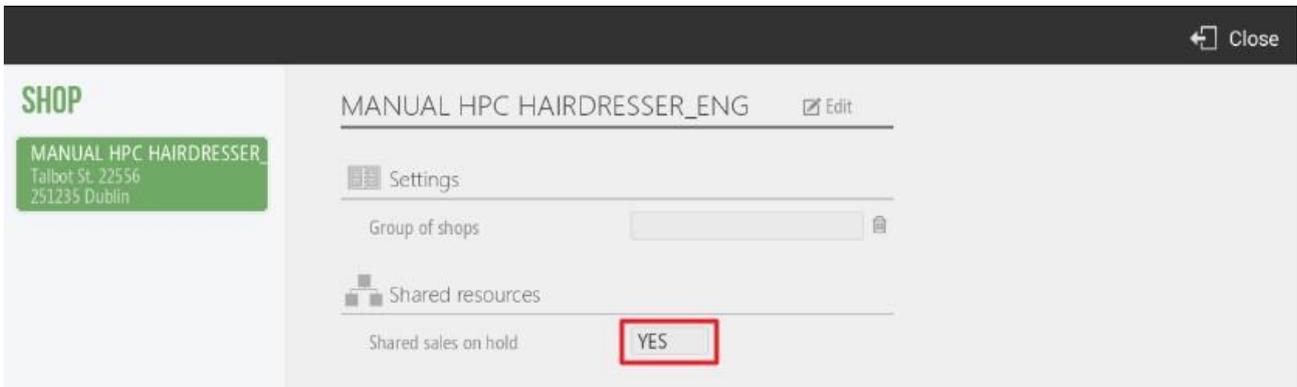
The *Cash count* option allows us to configure different options. We can *Send by e-mail* the Cash count, configure the *E-mail* address and finally configure for advising us if it is a discrepancy, also the discrepancy minimum to send us the email.

The *Sellers* option will allow you to share sellers between the terminal groups you have created. Press *Edit* to select the shops you want to share with.

The *Rates* option allows you to select the default rate to be used in the terminal, as well as share a rate among the group of terminals you have created. Press *Edit* to select the shops you want to share with.
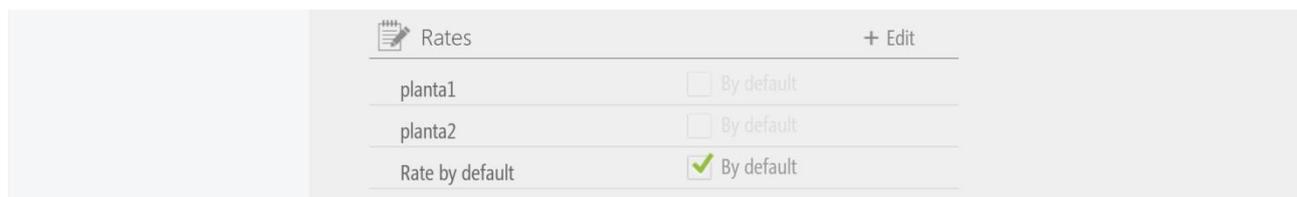
The *Currencies* option allows you to select the currency to be used by default at the point of sale, as well as share it among the group of terminals that you have created. Press *Edit* to select the shops with which you want to share the currency.
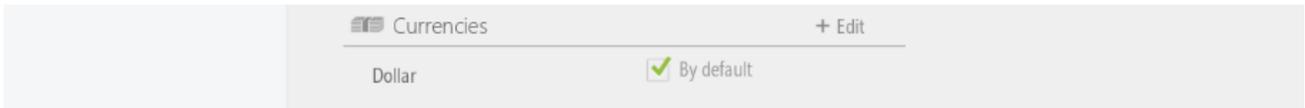
The *Default Taxes* option allows you to select from the tax list that has created the tax to be applied in each type of transaction.
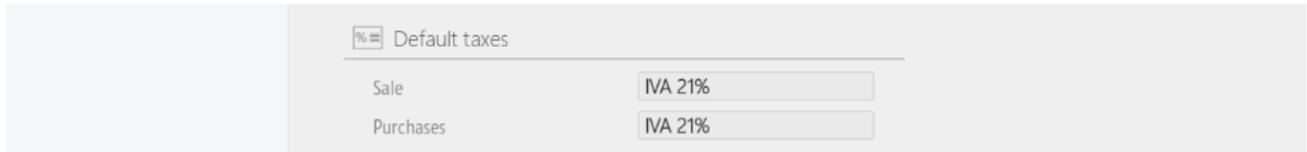
The *Payment types* option allows you to share the means of payment you have available in the shop with the group of shops you select. Press *Edit* to select the shop you want to share with.

The *Discount Reasons* option allows you to share the discount reasons available in the shop with the group of shops you select.

The *Item Labels* option allows you to select which types of labels are wanted for each specific shop.
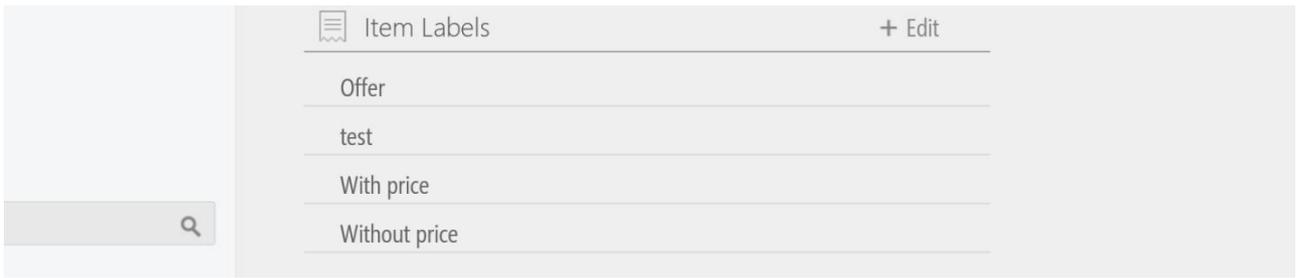
Finally, we can configure the customer screen. Customer Screen can be configured by *Image sequence* or *Video.* Also, we will be able to configure the *Receipt Alignment.*

13.4. Switching series and terminal configuration

The series refers to the initials of the range number of each document that HioPOS Cloud issue. These are used to distinguish between documents. To change the series, go to the Terminal option in Configuration.
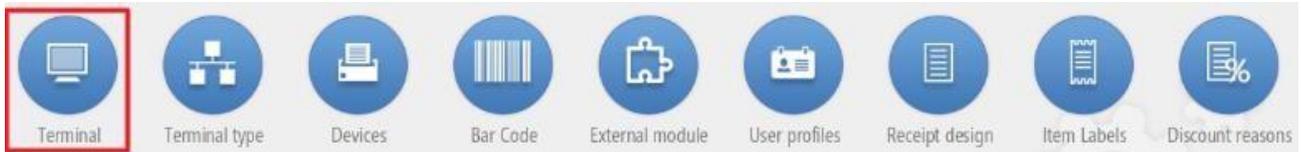
There you can modify the series freely, as long as it is no longer in use. Select on the left side another terminal to modify it from the current terminal.

The series you use will appear in the documents followed by a dash and the document number, always starting with the number one and going up one at a time.

In accordance with the provisions of Article 6 of the 2012 Billing Regulation, all invoices and their copies must contain certain data or requirements. One of these requirements is the number and, if applicable, series. The numbering of the invoices within each series will be correlative. The legislation allows invoices to be issued by separate series, with the obligation to issue separate series in the cases of invoicing by the addressee or a third party, in case of amending invoices and in cases of delivery due to administrative and judicial enforcement procedures.

In *Configuration*, *Terminal* the user can configure the Default Rate that will use the terminal, the default room where it will operate and the orientation of the screen. The latter is especially useful when using mobile devices as commanders.

Default values

Default rate   Default rate

Screen orientation   Landscape

In *Configuration*, *Terminal* you can assign a CashDro to a terminal informing the IP address of the CashDro, user, password and terminal administrator. You must activate the "Link with CashDro" option in *CloudLicense*, *Terminal Modules.*

CashDro   + Add

'C Eng   🔍   IP Address   192.168.7.36   ☑ Edit

13.5. Type of terminal: Configuration

In the *Configuration*'s section, *Type of terminal* you will find several options to configure in reference to the Type of business, Printing options, Modifiers in the packs, Tip, Timeout, Service charge.
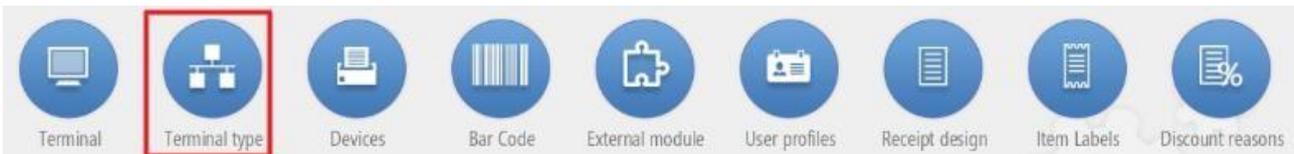
You can configure if you want to block sales by seller. For the tantalization block, it indicates that the terminals that are of this type of terminal cannot total the sales. Finally, if the terminal is able to perform Z Cash Count even with open sales.

TERMINAL TYPE	Tipo terminal	🗑 Delete	☑ Name
Tipo terminal	**Business type**		
	Lock sales by seller	NO	
	Block invoicing	NO	
	Allows to do a Z cash count with open sales	YES	

In the *Printing options* is where you can select if the button "Do not print" will be visible at the end of the sale. *Print receipt on fast total* means that if you want the Cash button appears on the sales screen to end the sales quickly. You can select if you want to print additional comments to an article by the ticket printer. Also if your active the option to print presence control voucher, the ticket will be printed with the salesman log

On the sales screen, from the ticket header, there is the option of *Send order.* Then, from the Terminal Type configuration you can configure if you want that its items must be printed when you are ordering to kitchen.

Printing options	
"Do not print" button	YES
Print receipt on fast total	YES
Print comments	YES
Print time clock proof	NO

On the *Packs-Variants* you can select if you want the option that when you select a Menu, appears the modifiers for these articles.

Packs – Variants	
Show only the items in rate	NO

At the *Tips* section, we can configure if we want to *allow tips*, *apply automatic tip yo pay, Percent of tip* and three different *suggested tip percentages*.

Tip	
Allow tips	YES
Apply automatic tip to pay	NO
Percent of tip	0
Suggested tip percentage 1	0
Suggested tip percentage 2	0
Suggested tip percentage 3	0

In the *Time out* section you can select if you want to close the opened session of the seller when the HioPOS Cloud detect inactivity. As also, if you want to close the seller's session and return to the sellers screen every time that a sale has been totalized.

In the Service charge we can configure is we want to apply service charge, the percentage, if we want to apply before discounts and also the tax to apply.

In the last option, *Total* we can configure if we want to *Round last Digit.*

13.6. User Profile

User profiles allow you to create different groups of users that share access permissions to different options and possibility of performing certain functions.
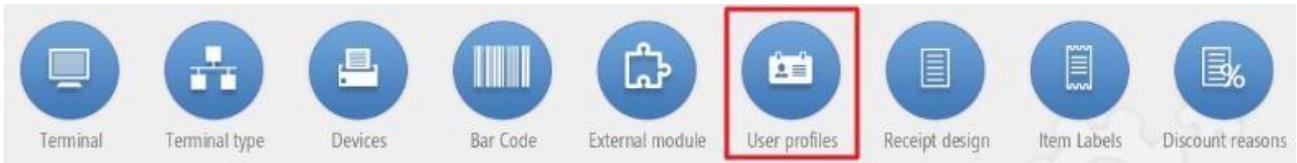
Each HioPOS Cloud user is associated with a profile. By default, the profiles that are included are Administrator, Manager and Seller.

13.6.1. New Profile

To create a new profile, select New from the top menu.

The new profiles are created based on existing profiles, so the new profile will default to the permissions of the selected profile, as well as the accesses it had. Select the base profile and name this new profile. Once all these options have been created, they can be modified.

In the *Access* section, you will be assigned to which shops you have access to the profile: seller's shop, Group of shops of the POS or all stores.
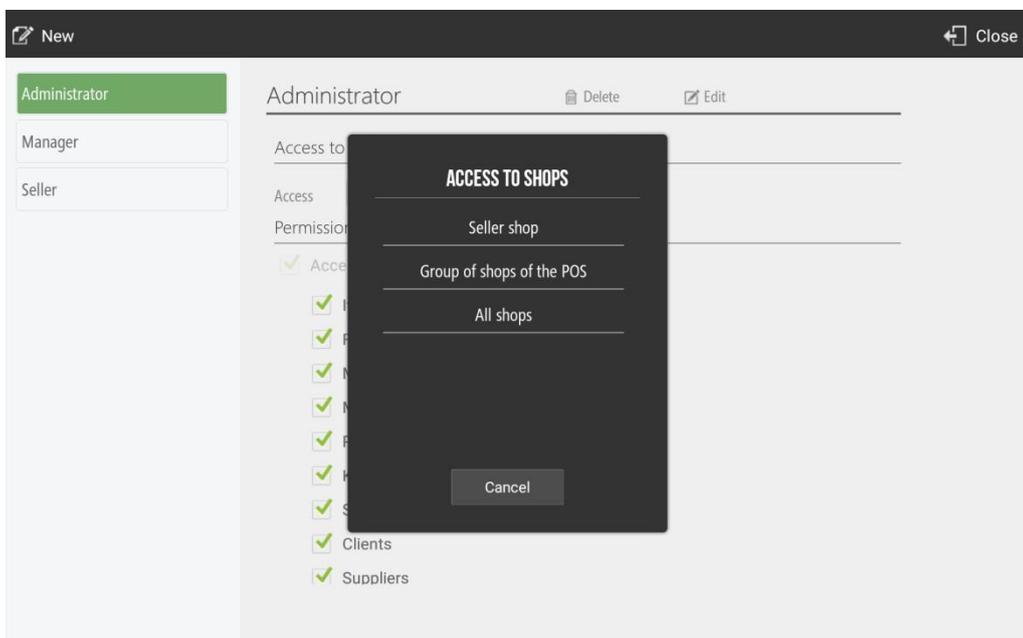

To *Delete* or *Edit* a profile click on the button next to the profile name.

13.6.2. Permissions according to profiles

The distinction between profiles is made to be able to group the types of sellers according to their permissions. These permissions give access or deprive of it to the different functions that HioPOS Cloud has.

In the default profiles, for example, is the *Administrator*, who has all the permissions; the *Manager*, who has all the permissions except the entry to Configuration and the display of statistics; and the *Seller*, who has only the basic sales functions enabled.

You can modify the different permissions by selecting the box that they have assigned. If the box is marked with a check, the user with the selected profile will have access to perform that function.
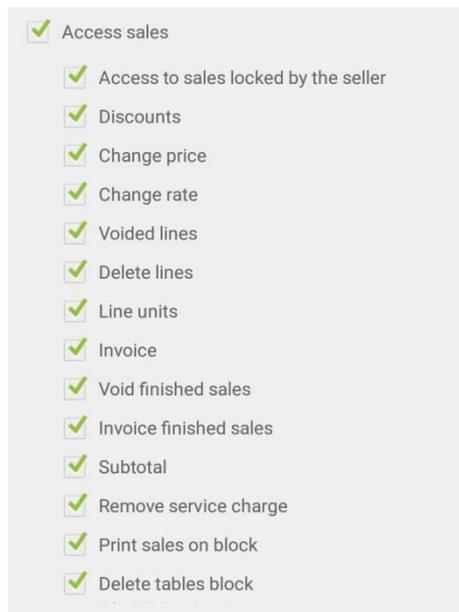
13.6.3. Access to shops

User profiles can be configured so that, in the various configuration menus, you can apply the changes to different shops. For this you have to select between the *Seller Shop*, to modify only the same terminal; Group of shops of the POS, to be able to apply changes to the different shops that form the group in question; and All shops, to apply the changes to all shops of the same customer.
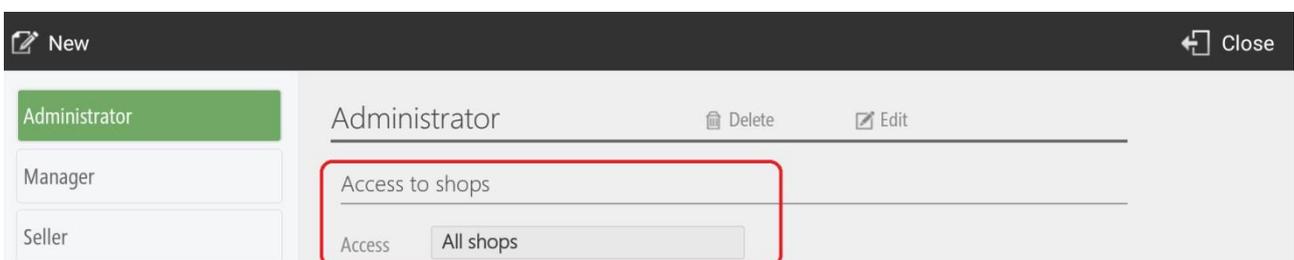
# 13.7. Receipt design

In the section of *Receipt Design* in *Configuration* you can add notes in the header and the foot of the ticket that you print during the sale*.*
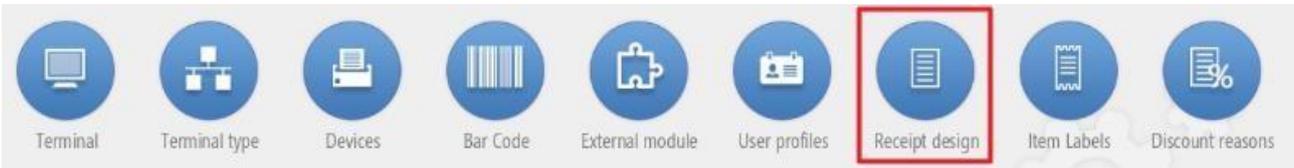
In Properties, the service number, consisting of the terminal number and the last two numbers of the ticket number can be displayed and printed, as shown in the following image. The ticket number is T000106-226 and the service number 626.

The receipt design screen is divided into two parts, the top for the header and the bottom for the footer. Press the *addition symbol* to add a literal in the ticket, such as header or footer.
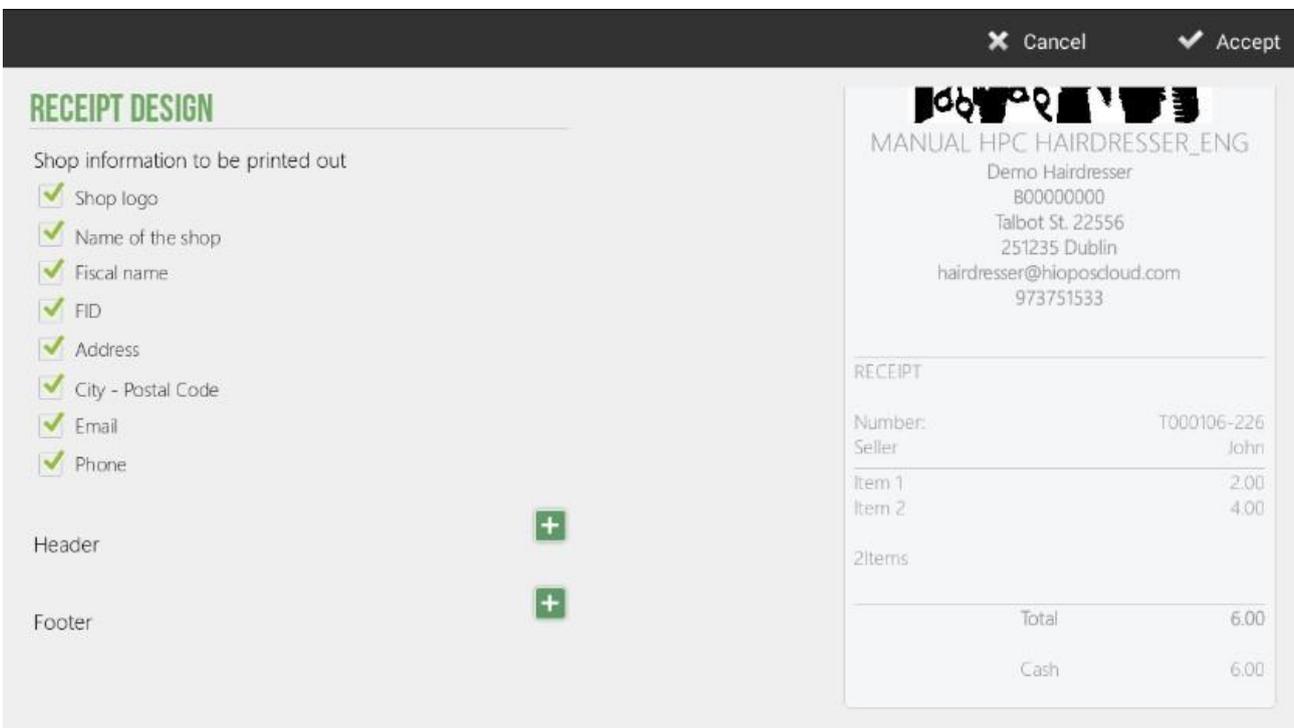

When you add a note in the part of the Header or Foot, you can edit and select the formatting and alignment of the text, as shown in the following image:
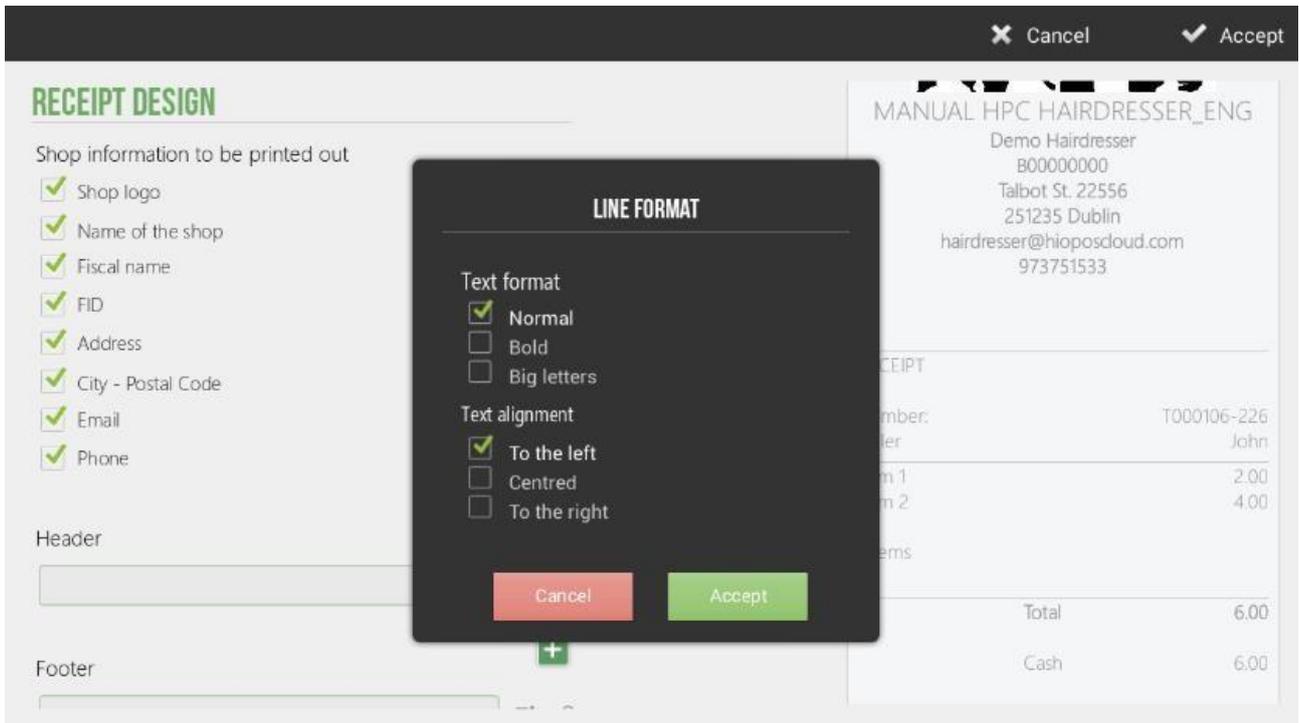
13.8. Currency

Currency in *Configuration* option allows you to modify and create new currencies that you can use for collection.
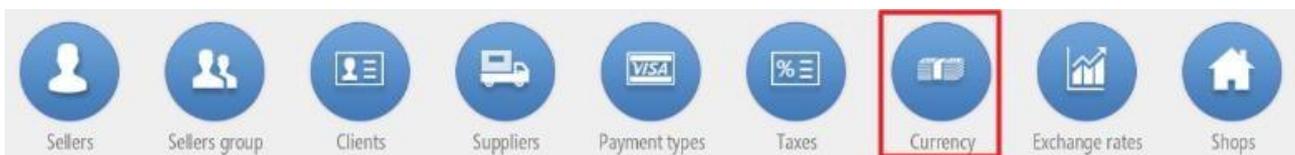
Once you select the currency you want to change or select *New currency*, you can give it a name, enter the number of decimals, the initials or sign of the currency, and set these sign precedes the value.

You can also create new pieces or denominations that correspond to the values of each currency or currency bill.

13.9. Exchange rates

Exchange Rate option from *Configuration* allows you to enter the current price of each currency against the *Reference Currency*.
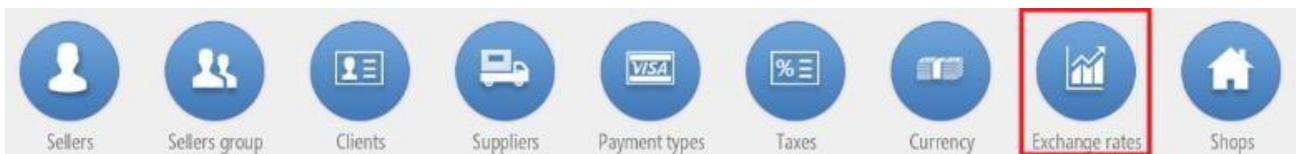
Select the reference currency, which will default to 1.00 and then enter the exchange rate of the second currency against the reference currency.

EXCHANGE RATES

Currency

USD

USD

Reference currency

- Euro
- USD

Exchange rate

€ 1,00 = 1

Cancel

Now any sale that you make with any currency will be calculated according to the quote that you have introduced.

13.10. Synchronization

Synchronization option allows the user to synchronize all the modifications that the program has generated in the terminal. It is used to generate an update of all configurations. In most cases this option does not require your application since the program is automatically synchronized after each modification.

To perform a *Synchronization* of the program you will have to go to *Administration*, *Synchronization*, as indicated in the following screen.
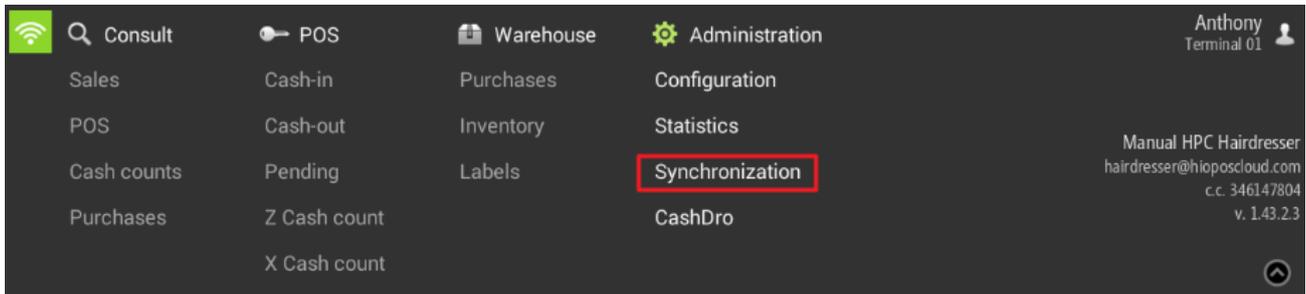
13.11. Bar code configuration

HioPOS Cloud offers the possibility of Configuring the Bar Code for Scales. To configure this functionality, the user should go to Configuration, Barcode.

The user can modify the bar code prefix number for the balance and you can configure the two barcode options.

There are two possibilities in the configuration of bar codes, by Weight and by Price.

If you want to interpret a bar code that contains the weight of an article, you will configure the bar code to show the weight of the article. In configuration of articles you must have informed a price per kilo that the application will collect and apply after reading the bar code. To configure it you will select the weight button: "W" and select the fields of the code that you want to be of this type.

If you want to interpret a bar code that contains the price of an item, you will configure the bar code to show the price of the item. To configure it select the price button: "P" and select the fields of the code that you want to be of this type.

The bar code display for the balance is shown below. In our example, you have set the first four digits and assign them to the article reference. You have set the number of decimals in 3 for the weight and in 2 for the price, this marks us the decimal separator. The remaining six digits will be the ones configured for weight and price respectively as presented.

13.12. Reset of the program

Reset option allows the user to delete all information that the program has stored in the terminal. It is used so that, when re-running the application, this is as if it had never been used, so you will ask for the language, the user and the password when you enter the program, as if a new installation.

The *Reset* button is on the Configuration screen, at the upper left margin. When you click on *Reset* the application will ask for the confirmation to continue with the process.
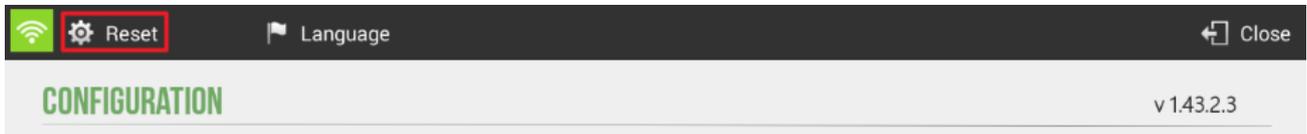
By default, the *Reset* option is not available for any user or profile. If you want to activate this button, go to *User Profiles* in the *Configuration* menu.
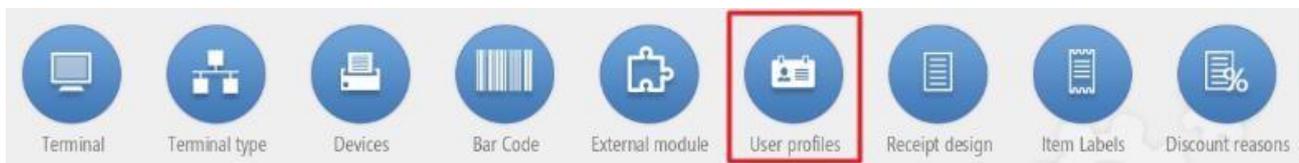
The option to activate is *Reset Terminal Identifier*.
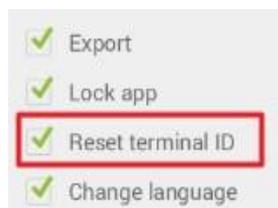
13.13. Lock App

This option can be found in the section *Lock App*, under *Configuration*.


 Entering a program lock password will prevent users from leaving the application without entering the password of the application.
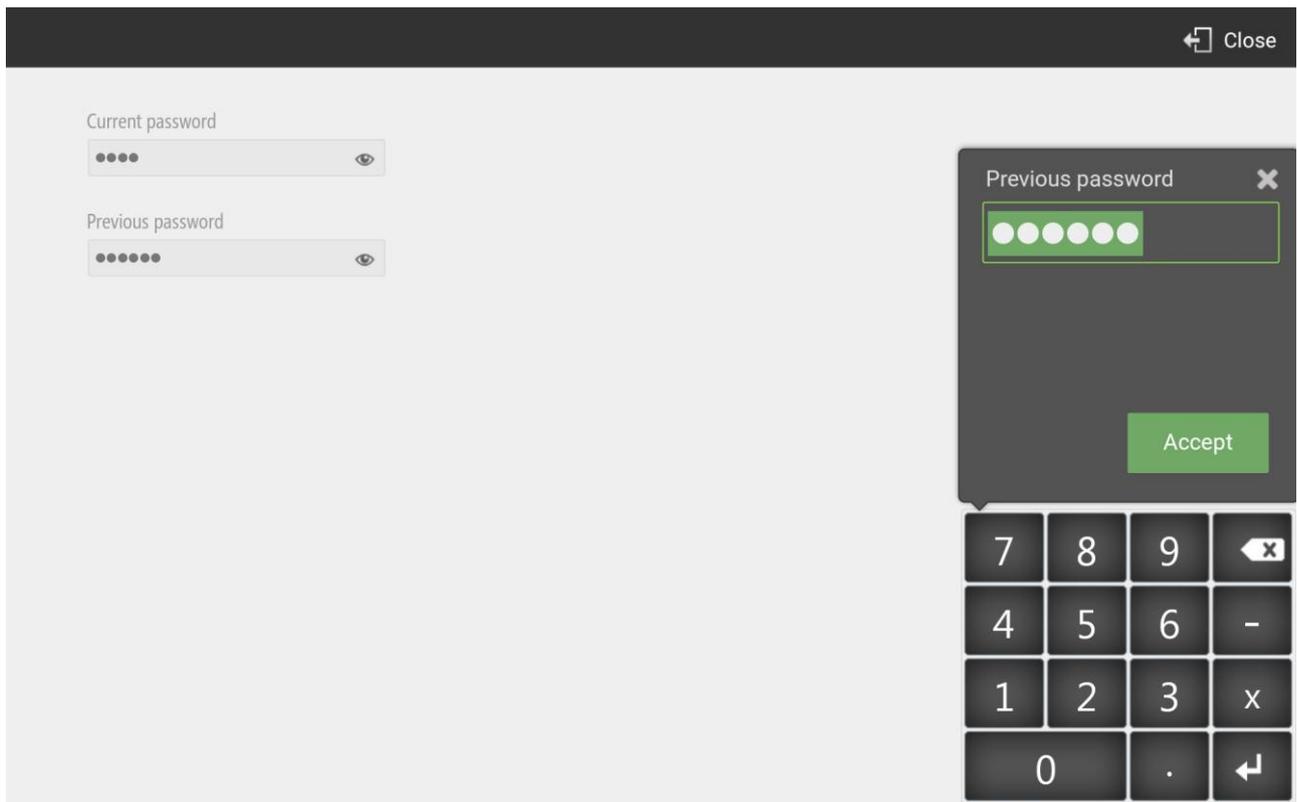
To exit the program, go to the seller's screen and click on *Turn off* from the top menu. Then enter the password you just created.

If you press the Android *Home* button, taking the HioPOS Cloud turn off password, the first time Android will display the following message:
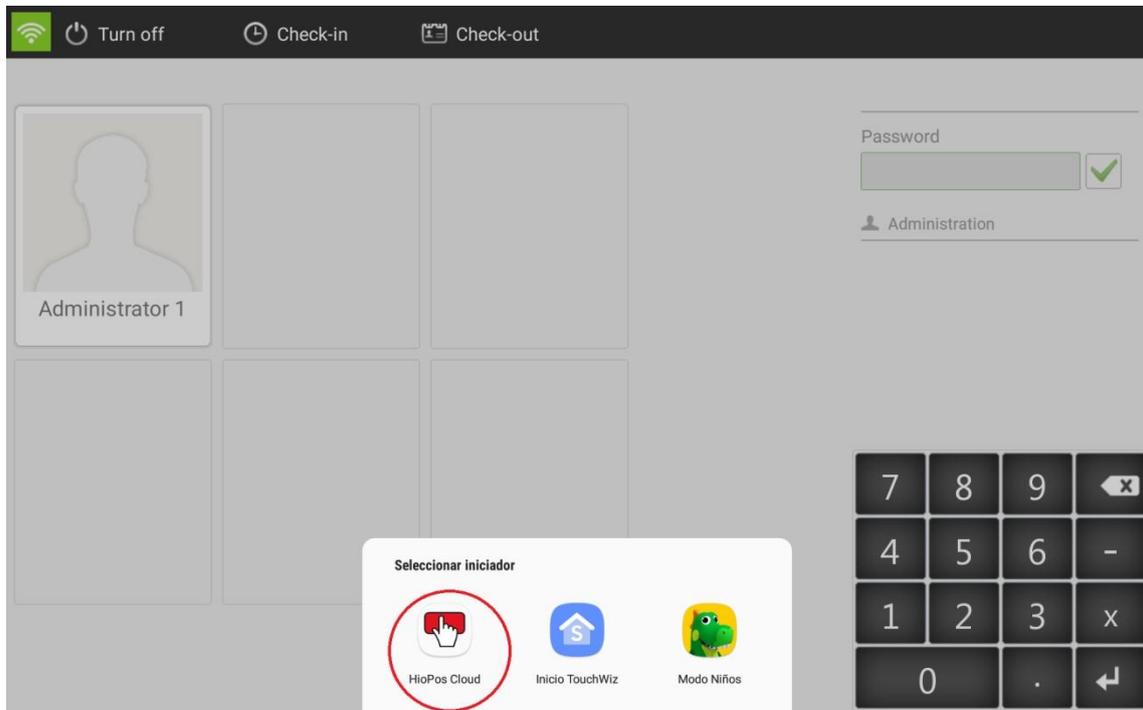
This message will allow you to configure the application that will launch every time you press the *Home* button. If you do not want users to have access to Android Operating System, select *HioPOS Cloud*, so whenever you press the *Home* button, Android will launch the HioPOS Cloud application. The HioPOS Cloud will also be automatically loaded when the terminal is turned on.

For more information of HioPOS Cloud you can check on the website:

www.hioposcloud.com