























BackOffice End-User Guide

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WHAT IS EMOBILEPOS AND HOW DOES IT WORK?

Our advanced, yet affordable Mobile Suite (Mobile Field Force Solutions & Wireless Credit Card Acceptance) enables you to instantly automate your (table-side) ordering & payments, direct store delivery, presales, or field service operation. You will be able to create orders, and invoices, take payments, process credit cards, check inventory, take signatures, and synchronize wirelessly with your existing accounting or ERP system like QuickBooks, Sage, and others from most mobile devices. eMobilePOS® assets include:

Reliable. eMobilePOS incorporates full transaction recovery and rollback, replication, and backup, transaction audits, and internal database management processes.

Easy to Use. The eMobilePOS user interface, designed and improved by retail experts, prioritizes efficiency with reduced keystrokes and a logical workflow. You can customize numerous operators prompts to match your terminology, making training needs even lower.

Fast. All fields within eMobilePOS can be keyed, scanned, or swiped allowing you to make full use of barcode and magnetic swipe technologies. You define the workflow and data capture requirements that suit your operation.

Flexibility. eMobilePOS operations are defined by your business rules and requirements. A user interface that is easy to use allows you to determine all aspects of the application's function, including eMobilePOS "look and feel."

Full Integration. eMobilePOS open architecture allows integration to accounting and ERP systems as well as other POS and custom or third-party systems. If integration is not required, our custom output files in standard CSV format (comma delimited) can be interfaced to host computer systems, as necessary.

Freedom of choice. eMobilePOS Point of Sale operates with a wide range of peripheral equipment including printers, barcode scanners, card readers, and even mobile Chip and PIN

SYSTEM REQUIREMENTS


COMPATIBLE MOBILE DEVICES:

- Android 5.0.1 or later
- iPad (5th Gen or later), iPad Mini 4 or later, iPad Air/iPad Pro (all generations)
- iPhone 6 (and later generations),
- iPod Touch (5th Gen or later)

COMPATIBLE ENTERPRISE RESOURCE PLANNING (ERP) SOFTWARE:

(All of the following software need to have been released in 2018 or later)

- QuickBooks Pro*
- QuickBooks Premier
- QuickBooks Enterprise
- QuickBooks Merchant Services
- Sage 50 Pro • Sage 50 Complete
- Sage 50 Premium • Sage 50 Quantum

 QUICKBOOKS ONLINE AND QUICKBOOKS MAC ARE NOT COMPATIBLE WITH THE EMOBILEPOS SOFTWARE.

MAC REQUIREMENTS

If you are planning to use an OS X-based computer, to run the BackOffice interface against your ERP or accounting system, we recommend the following alternatives for the data synchronization (also using the above PC requirements):

- Running a virtual Windows operating system and ERP software.
- Run the Boot Camp Assistant to install a Windows OS with the ERP software.

MERCHANT ACCOUNT

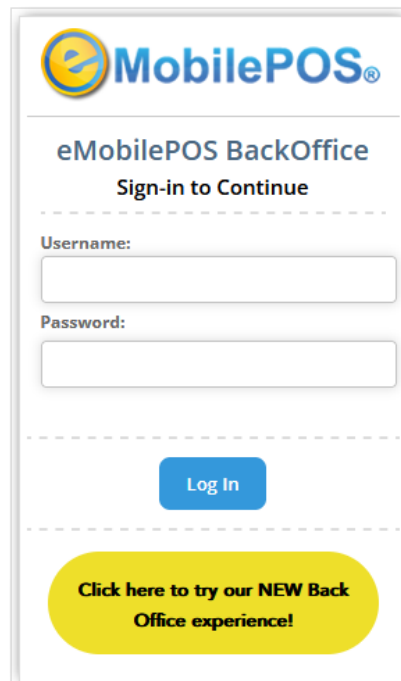
If you are planning to process credit cards you need to provide the eMobilePOS team with the information about the merchant card processor that you will be using (ex. First Data, Chase Merchant Warehouse, Global). Please request your merchant processor to supply the “VAR Sheet” which would help speed up the process. To link your merchant account to the BackOffice (to enable credit cards as a payment method), go to the System section in the BackOffice chapter.

THE BACKOFFICE

The BackOffice is a web-based administrative system that lets you manage, monitor, and edit all the data created to and from your mobile devices. The BackOffice is where you upload data so it can be used by your mobile devices, which will be further discussed in the following sections.

ACCESSING THE BACKOFFICE

To access the BackOffice, please go to <https://bo.enablermobile.com>, and enter your credentials provided by e-Nabler.



The screenshot shows the login interface for the eMobilePOS BackOffice. At the top left is the MobilePOS logo, which consists of a blue circle with a white 'e' and the text 'MobilePOS®' in blue. Below the logo, the text 'eMobilePOS BackOffice' is displayed in blue, followed by 'Sign-in to Continue' in black. There are two input fields: 'Username:' and 'Password:'. Below the password field is a blue 'Log In' button. At the bottom, there is a yellow button with the text 'Click here to try our NEW Back Office experience!'.

① CREDENTIALS NEEDED TO ACCESS YOUR BACKOFFICE ARE PROVIDED IN A WELCOME EMAIL SENT TO YOU UPON YOUR SUBSCRIPTION TO EMOBILEPOS®. IF NOT, PLEASE CONTACT SUPPORT@E-NABLERCORP.COM FOR ASSISTANCE.

HOME: BACKOFFICE MAIN SCREEN SHOWING THE DASHBOARD.

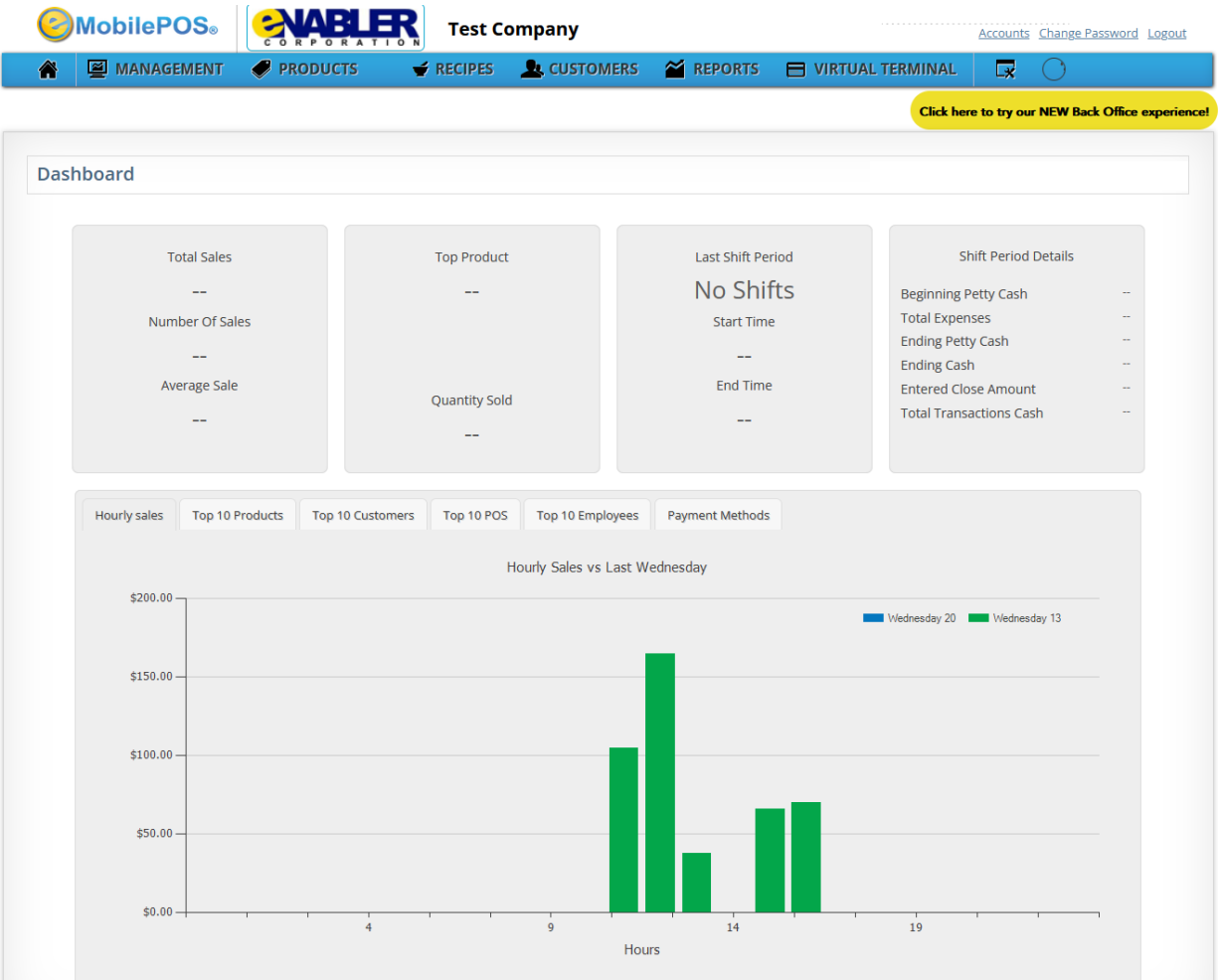
BackOffice is a user-friendly interface designed to streamline your decision-making process by presenting the most relevant information front and center. With just a glance, you can assess critical aspects of your business, such as sales trends, customer engagement, financial health, and more. This immediate access to data empowers you to make informed decisions swiftly and effectively.

The main screen of the BackOffice features a comprehensive dashboard tailored specifically to your business needs. This dashboard provides users with an immediate and insightful overview of their business-related information. This central hub condenses complex data sets into visually digestible elements, granting users the ability to swiftly comprehend their business's performance, trends, and critical metrics.

The user-friendly interface of the dashboard ensures accessibility to users of all technical backgrounds and offers an assortment of key performance indicators (KPIs) relevant to the user's industry and business objectives. This allows users to gauge their business's health and progress without the need to sift through extensive reports or spreadsheets. By prominently displaying essential data such as sales figures, the dashboard facilitates quick decision-making. Users can rapidly identify both opportunities and pain points, enabling them to respond promptly to internal operations.

In summary, the BackOffice dashboard is your go-to tool for gaining instant insights into your business's performance. It is user-friendly, informative, and adaptable, making it an invaluable resource for optimizing your decision-making and achieving your business objectives.

THE HOME SCREEN



The Home Screen is divided into *three* sections:

1. **Menu Bar:** Shows Menu options for user navigation.
2. **Dashboard totals:** Summary of selected date totals.
3. **Dashboard charts:** Tabs with sales statistics for the dashboard date.

THE MENU BAR



The menu bar acts as the jumping-off point to the following subsections within eMobilePOS:

Home: Main screen of your BackOffice showing the Dashboard.

Management: Shows links to manage Sales, Payments, Consignments, Locations, Employees, and Import from Nexternal web services.

Products: Allows you to view, edit, and create products, price levels, product categories, and attributes.

Recipes:

Customers: View, edit, and create Customers in this section.

Reports: Allows you to view various reports for sales, employees, inventory, and location.

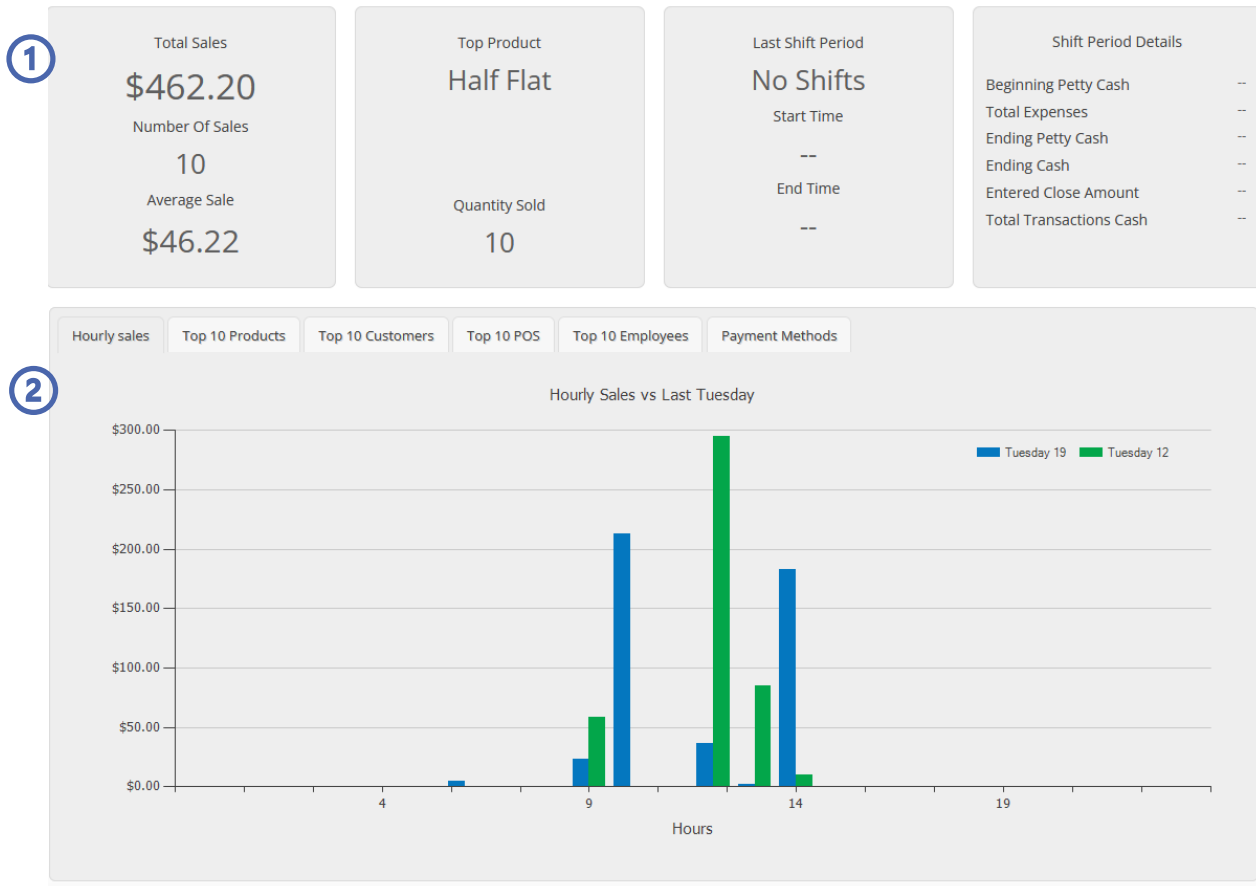
Virtual Terminal:

Toolkit: Shows links to configure Company Logo, Defaults, Merchant Accounts, and Receipts Header and footer among others used to configure eMobilePOS behavior on mobile devices.

Software Download section: Shows links to download additional information related to BackOffice.

DASHBOARD

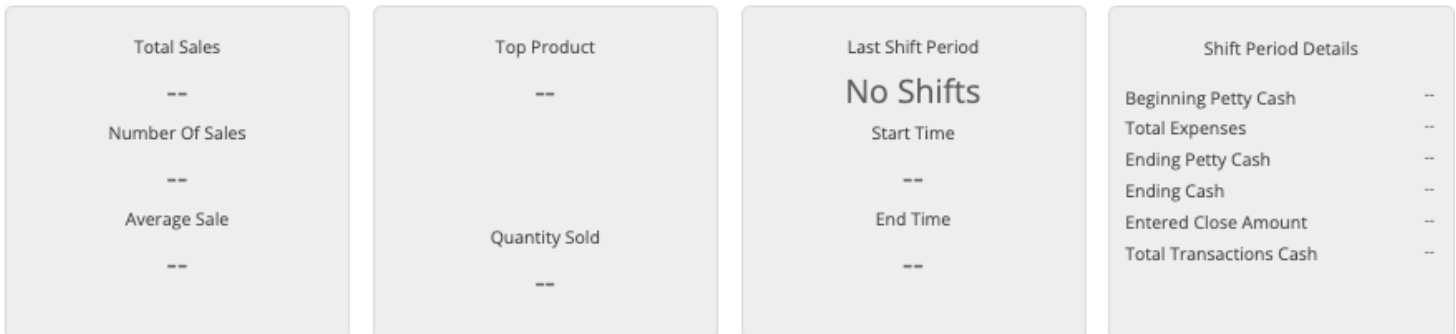
Along with the Menu Bar once logged into your BackOffice, you will also see the eMobile POS Dashboard. The Dashboard contains graphical illustrations of how your business is running according to the data that your mobile devices are sending to the BackOffice. These graphical summaries will help you keep track of the progress of your business.



As mentioned previously, the Home Screen dashboard is comprised of two parts:

1. Dashboard Totals
2. Dashboard Charts

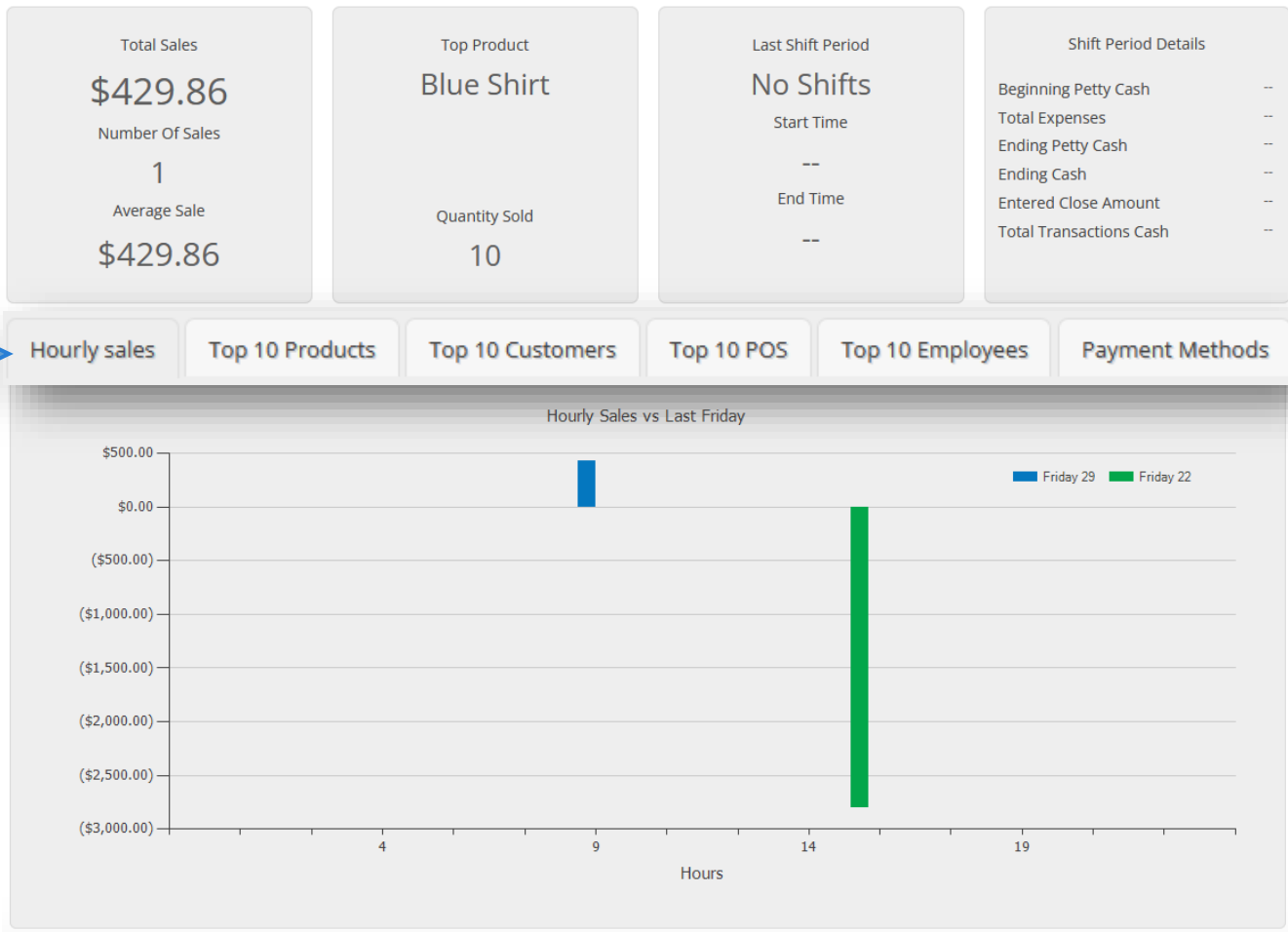
DASHBOARD TOTALS



The *Dashboard Totals* section will give you an overview of various statistics related to various aspects of your business. These include:

- *Total Sales*
- *Number of Sales*
- *Average Sale*
- *Top Product*
- *Quantity Sold*
- *Last Shift Period*
- *Start Time*
- *End Time*
- *Shift Period Details*
 - Beginning Petty Cash*
 - Total Expenses*
 - Ending Petty Cash*
 - Ending Cash*
 - Entered Close Amount*
 - Total Transaction Cash*


DASHBOARD CHARTS

























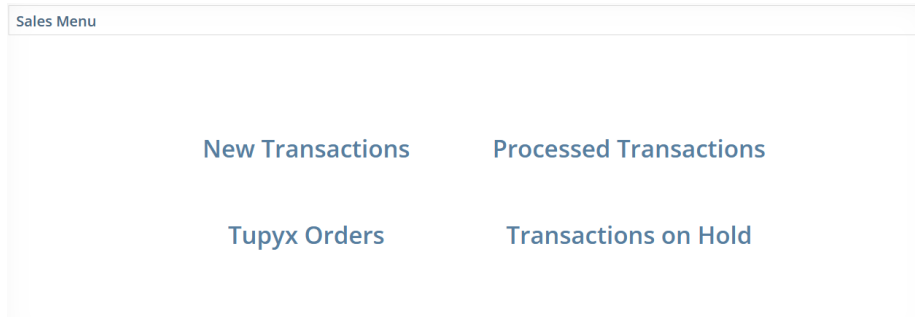
From the homepage users also have access to the *Dashboard Charts* which may be selected by using the tabs at the top of the graphs section of the homepage. These tabs allow you to see various graphical interpretations of information from within the BackOffice, these include:

- *Hourly Sales*
- *Top 10 Products*
- *Top 10 Customers*
- *Top 10 POS*
- *Top 10 Employees*
- *Payment Methods*

THE MANAGEMENT SECTION

The  **MANAGEMENT** feature is a comprehensive tool that empowers users to efficiently oversee and control various aspects of their business operations. With this feature, you can access and manage critical functions such as *sales, payments, consignments, locations, employees, and data importation*. You will gain access to vital functionalities and options, all strategically designed to equip you with the tools necessary for proficiently managing and controlling various critical facets of your business operations. You will find the following in Management:

 <i>SALES</i>	 <i>TRANSIT CONFIGURATION</i>
 <i>PAYMENTS</i>	 <i>VENDORS</i>
 <i>CONSIGNMENTS</i>	 <i>PURCHASE ORDERS</i>
 <i>ORDER ATTRIBUTES</i>	 <i>IMPORTED PURCHASE ORDERS</i>
 <i>LOCATIONS</i>	 <i>UOM</i>
 <i>INVENTORY TRANSFER</i>	 <i>RECEIVING DOCUMENTS</i>
 <i>BVS SERVERS</i>	 <i>DONATIONS</i>
 <i>EMPLOYEES</i>	 <i>SAP BUSINESS 1</i>
 <i>DEVICES</i>	 <i>CUSTOMER MESSAGES</i>
 <i>ROLES</i>	 <i>DEVICE SETTINGS</i>
 <i>SHIFTS</i>	 <i>IMPORT</i>



① THIS SCREEN SERVES AS A VALUABLE TOOL FOR TRACKING AND OPTIMIZING YOUR SALES PROCESSES. IT ENABLES YOU TO CLOSELY MONITOR SALES TRANSACTIONS, PROVIDING YOU WITH THE DATA NEEDED TO MAKE INFORMED DECISIONS AIMED AT BOOSTING YOUR REVENUE.

NEW TRANSACTIONS

This feature serves as a centralized hub for transaction management, offering critical functionalities and benefits to streamline your financial processes and ensure data accuracy.

You can search for transactions made in the Device (After Sync) by *transaction number*, *Date*, or by selecting **Advanced Options**.

By using the Process Orders Box, you can Hold, Send, Process, or Delete a transaction. (*Hold, Send and Process will only be used for Accounting Software users.*)

Hold: This option holds the selected transaction from entering the accounting software.

Send: This option sends the selected transaction to the accounting software.

Processed: This option will mark the selected new transaction as processed and send it to the **Processed Transactions** section of the BackOffice.

Delete: This option lets you remove the selected transaction before it enters the accounting software.

After setting the parameters of the search, press **Apply Filter**.

PROCESSED TRANSACTIONS

This menu displays all the transactions that have been processed by an accounting system such as QuickBooks, Sage 50, Sage 300, and SAP. You can search for transactions made on the device (after sync) using the transaction number, and date, or by selecting advanced options. With the process orders box, you can hold, send, process, or delete a transaction. However, please note that hold, send, and process is only applicable to accounting software features.

Hold: This option holds the selected transaction from entering the accounting software.

Send: This option sends the selected transaction to the accounting software.

Processed: This option will mark the selected new transaction as processed and send it to the Processed Transactions section of the BackOffice.

Delete: This option lets you remove the selected transaction before it enters the accounting software.

After setting the parameters of the search, press **Apply Filter**.

TUPYX ORDERS

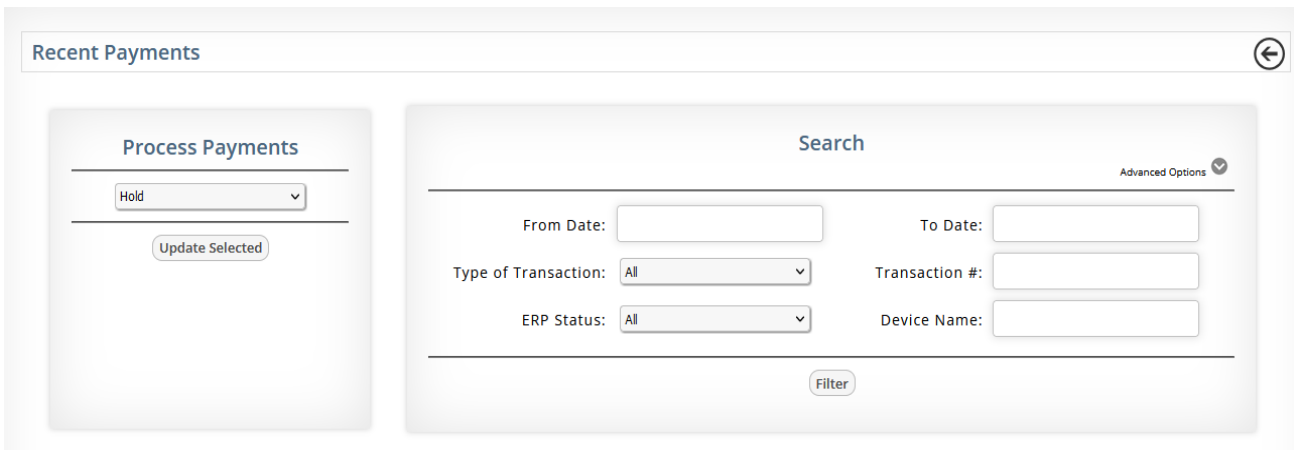
This screen provides a comprehensive list of recent Tupyx transactions, offering you an in-depth overview of the latest activities and engagements within Tupyx.com.

TRANSACTIONS ON HOLD

This feature provides a comprehensive list of recently saved transactions, which can be recalled and accessed from the Point of Sale (POS) system.

① TRANSACTIONS NEED TO BE SYNCHRONIZED TO THE BACKOFFICE FROM THE POS USING THE EMOBILEPOS APPLICATION.

This feature will help you optimize payment processing, closely monitor payment histories, and guarantee the prompt and precise execution of financial transactions.



In this section, you will find the payments associated with the transactions made on the device. Same as in the [Sales](#) module, you can search by Date, and add filters like Type of transaction, Transaction number, Device name, or by selecting **Advanced Options**.

After setting the parameters of the search, press **Filter**.

① TRANSACTIONS MADE WITH CREDIT CARDS WILL BE DISPLAYED INSTANTLY IN THE BACKOFFICE AND DO NOT NEED TO BE SYNCED. CREDIT CARD PAYMENTS REQUIRE INTERNET CONNECTIVITY TO PROCESS.

PAYMENTS: VIEW RECENT PAYMENTS

In this section, you will find the payments associated with the transactions made on the device. You can search by Date, or by adding filters like Type of transaction, Transaction number, and Device name, or by selecting Advanced Options.

After setting the parameters of the search, press filter.

The screenshot shows the 'Recent Payments' interface. On the left is the 'Process Payments' section with a 'Hold' dropdown and an 'Update Selected' button. On the right is the 'Search' section with an 'Advanced Options' toggle. The search filters include: 'From Date' (09/13/2023), 'To Date' (09/14/2023), 'Type of Transaction' (All), 'Transaction #' (empty), 'ERP Status' (All), and 'Device Name' (empty). A blue arrow points to a 'Filter' button located below the search filters.

① TRANSACTIONS MADE WITH CREDIT CARDS WILL BE DISPLAYED INSTANTLY IN THE BACKOFFICE AND DO NOT NEED TO BE SYNCED TO THE DEVICE BECAUSE CREDIT CARD PAYMENTS REQUIRE INTERNET CONNECTIVITY TO PROCESS.

Consignments

Keeping track of consignments is essential for organization and supply chain management. You can use this feature to monitor the movement of goods, track deliveries, and ensure efficient inventory management.

Users can go through Consignment transactions on this module by either entering the Employee Name or the Customer Name in the corresponding search and clicking on the green check mark.

Consignments

	Consignment ID	Employee Name	Customer Name	Date Created
<input type="button" value="Open"/>	10-00003-2020	Windows R2	5.5.0.17 version 27	2020-03-16T15:01:22+00:00
<input type="button" value="Open"/>	123-00013-2020	jean Michael	consignment test	2020-02-12T12:00:18+00:00
<input type="button" value="Open"/>	123-00012-2020	jean Michael	consignment test	2020-02-12T11:59:32+00:00
<input type="button" value="Open"/>	123-00011-2020	jean Michael	consignment test	2020-02-12T11:58:18+00:00
<input type="button" value="Open"/>	123-00010-2020	jean Michael	consignment test	2020-02-12T11:58:01+00:00
<input type="button" value="Open"/>	123-00009-2020	jean Michael	consignment test	2020-02-12T11:57:13+00:00
<input type="button" value="Open"/>	123-00008-2020	jean Michael	consignment test	2020-02-12T11:56:46+00:00
<input type="button" value="Open"/>	123-00007-2020	jean Michael	consignment test	2020-02-12T11:56:00+00:00
<input type="button" value="Open"/>	123-00006-2020	jean Michael	consignment test	2020-02-12T11:55:08+00:00
<input type="button" value="Open"/>	123-00005-2020	jean Michael	consignment test	2020-02-12T11:54:45+00:00

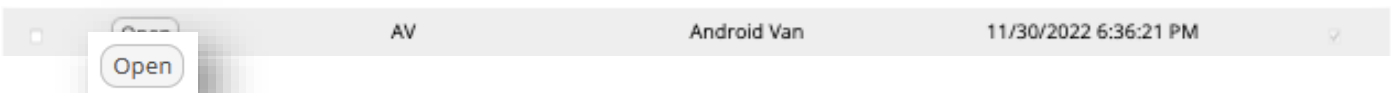
For businesses with multiple locations or branches, this feature provides a centralized platform to oversee and coordinate operations across different sites. You can manage inventory levels, staffing, and organization at each location. The Locations icon is where you will set up the places, areas, or even events where your devices will be working.

This section has two subsections: the **Locations** list, which displays all your locations created, and the **Add Locations**, to create a new location in your BackOffice as well as buttons to activate or deactivate locations.

① THE LOCATIONS ARE NOT LIMITED TO A PHYSICAL PLACE; YOU CAN CREATE A LOCATION TO DESCRIBE A ONE-TIME OR RECURRING EVENT LIKE A TRADESHOW OR EVEN A TRUCK FOR PRODUCT DELIVERIES.

LOCATIONS: LIST

The locations list displays all your created locations. Here you can open and manage or create each location. Users can assign inventory, devices, printers, payment methods, taxes, etc. to the specific location. Clicking the open button will take you to the location details:



Edit Location: Android Van

Details | Inventory | Assign Devices | Printers | Payment Methods | Price Levels | Categories | Taxes | Terms & Conditions | Sync. Times

Location Details

Location ID: AV Location Name: Android Van Is Active

Header Line 1: A van full of Androids

Header Line 2:

Header Line 3:

Footer Line 1: Where everyone is Welcomet

Footer Line 2:

Footer Line 3:

Store Name: Android Van Location

Store Email:

Save Cancel

① FOR THE LOCATION SETTING TO TAKE EFFECT, YOU WILL NEED TO SET “DOWNLOAD LOCATION INVENTORY ONLY” TO YES IN THE DEVICE NAME (SEE SECTION “DEVICES: ADDING A DEVICE USER”)

LOCATIONS: ADDING A NEW LOCATION

To add a new location to your locations list, click on the Add New Location tab on the Locations list. This will take you to the screen where you will add the info on your new location.



Add the information, check the box next to Is Active, and click on Save.

Add Location ✕

Details

Location Details

Location ID: Location Name: Is Active

Header Line 1:

Header Line 2:

Header Line 3:

Footer Line 1:

Footer Line 2:

Footer Line 3:

Store Name:

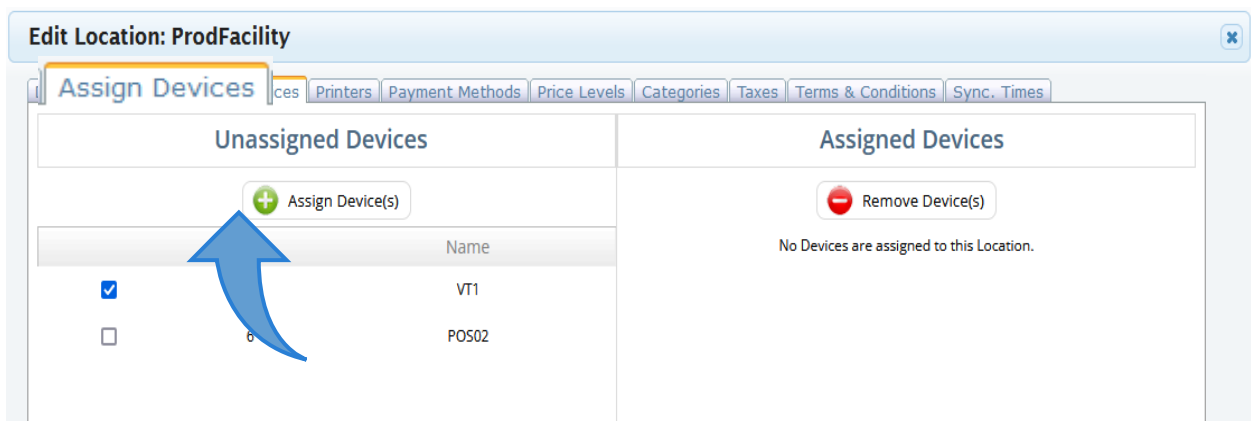
Store Email:

Save Cancel

① SUPPORTED ERP OR ACCOUNTING SYSTEMS CAN UPLOAD LOCATION INFORMATION WITHOUT THE NEED TO CREATE THE LOCATION FROM THE BACKOFFICE.

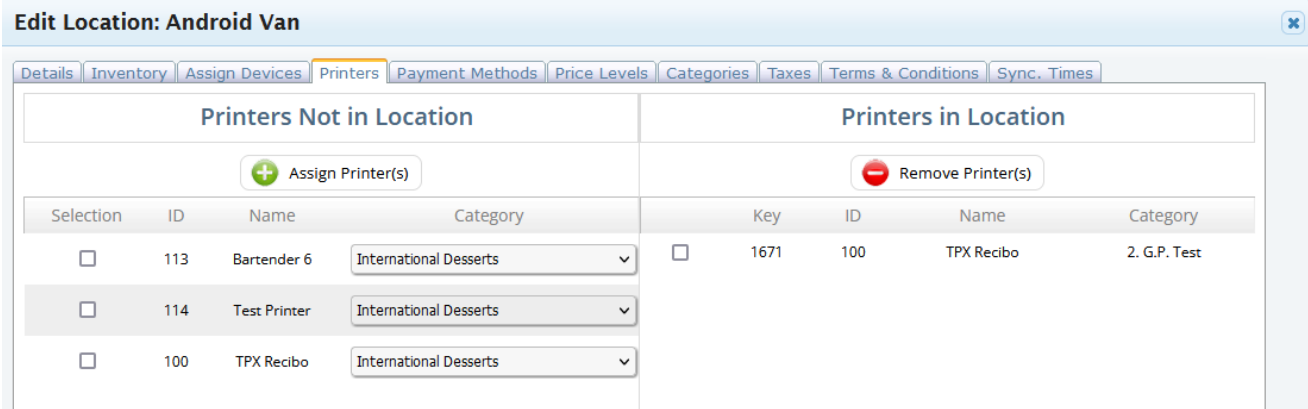
LOCATIONS: ASSIGNING DEVICES TO LOCATIONS

1. To assign employees/device users to a location, move your mouse cursor to the Locations tab and click on Locations List.
2. Look for the desired location and click on Open.
3. Go to the Assign Devices tab.
4. Look for the desired employee on the left side of the list and check the box next to the employee.
5. Click Assign Devices.



LOCATIONS: ASSIGNING PRINTERS

To Add a printer to a location, a network printer needs to be configured in the BackOffice. This is useful for example in a Restaurant environment, to configure a “Kitchen printer.”



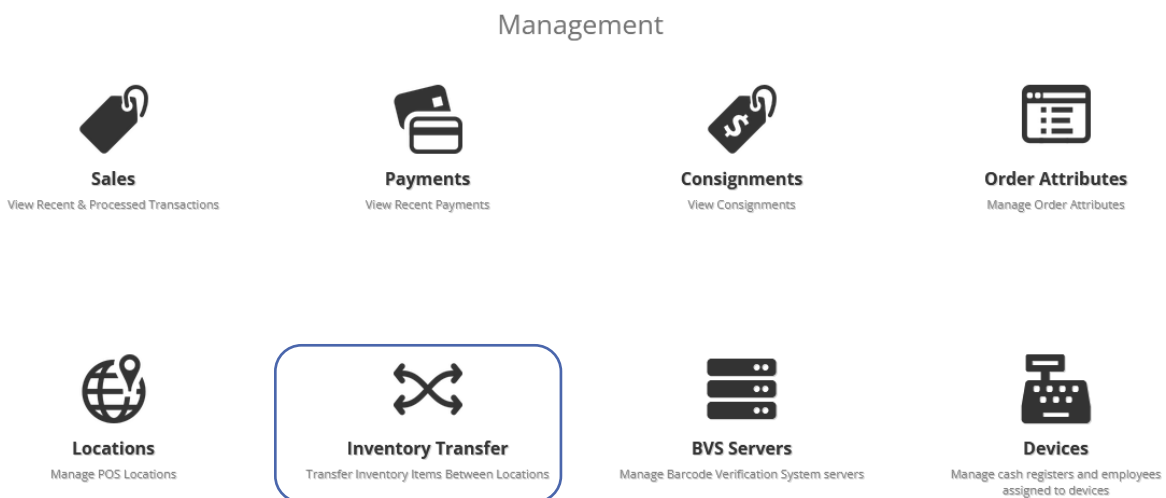
1. To assign inventory to a location move your mouse cursor to the Locations tab and click on Locations List.
2. Look for the desired location and click on Open.
3. Go to the Printers tab.
4. Select the Network printer from the list and assign the categories that it should print.
5. Click Assign Printers.

INVENTORY TRANSFER

The following section describes the process to create and complete an Inventory Transfer between 2 Locations. An inventory transfer, or warehouse transfer, is when goods are transported from one warehouse location to another. One acting as an Emissary and the other as the Recipient.

ⓘ THE EMISSARY LOCATION SHOULD HAVE INVENTORY ASSIGNED TO GENERATE A LIST OF ITS ITEMS AND THEIR QUANTITIES.

To access the Inventory Transfer area please navigate to the Management sub-menu and press the [Inventory Transfer](#) option shown.



INVENTORY TRANSFER: SET LOCATIONS

1. Select & Set a Location from where to take the Inventory.

The screenshot shows the 'Inventory Transfer' form. The 'From' field is set to 'Search by Location' and is open, displaying a dropdown list with the following items: 'afsdas', 'Android Employee1', 'Android Van', 'Android WH', and 'BDA Demo Data'. The 'To' field is also set to 'Search by Location'. Below the dropdown, there is a search bar with the text 'Search by Name, UPC, SKU' and a 'Records Per Page' dropdown. A table with columns 'SKU', 'Description', 'On Hand', and 'Transfer Qty.' is visible, with a message 'No results available. Select & Set a Location FROM where to take the inventory to refresh the grid.' at the bottom. At the very bottom, there are 'Confirm' and 'Clear Form' buttons.

A searchable list containing all available locations is provided to choose where the Inventory is to be taken. This location selection is required since it will populate the grid with the available inventory and its products deducted when the transfer is complete. Press “**Set Location**” once completed.

2. Select & Set a Location that will receive the Transfer.

The screenshot shows the 'Inventory Transfer' form. The 'From' field is set to 'Main Warehouse'. The 'To' field is set to 'Search by Location' and is open, displaying a dropdown list with the following items: 'pjrttest', 'pjrttest2', 'Retail Location', 'SF Mall', and 'Super Waiter'. The 'Retail Location' item is highlighted. Below the dropdown, there is a search bar with the text 'Search by Name, UPC, SKU' and a 'Records Per Page' dropdown. A table with columns 'Product - UPC', 'SKU', 'Description', and 'Transfer Qty.' is visible, with a message 'No results available. Select & Set a Location FROM where to take the inventory' at the bottom. At the very bottom, there are 'Confirm' and 'Clear Form' buttons.

A searchable list containing all available locations is provided to choose where the inventory is to be taken. This location selection is required since it will populate the grid with the available inventory and its products when the transfer is complete. If the location selected is the same as the original, a validation message will prevent you from selecting it.

INVENTORY TRANSFER: ADD INVENTORY TO TRANSFER

Inventory Transfer

Select & Set a Location from where to take the inventory. From: **Main Warehouse**

Select & Set a Location that will receive the Transfer. To: **Retail Location**

Add the Inventory products to transferred. Records Per Page: 10 Search by Name, UPC, SKU or Description

	Product - UPC	SKU	Description	On Hand	Transfer Qty.
<input type="button" value="+ Add"/>	1 x 4 Mahogany Hardwood -		MH Description	10000.0000	<input type="text"/>
<input type="button" value="+ Add"/>	1 x 4 Poplar Hardwood -			10000.0000	<input type="text"/>
<input type="button" value="+ Add"/>	1 X 4 Red Oak Hardwood - 58187869354		Solid red oak hardwood. Sold by square feet.	10000.0000	<input type="text"/>

The inventory will be taken from the selected Location after being set.

- The Records per Page drop-down will show the maximum number of results per page.
- A search of two or more characters can be made by querying the following fields:
 - Name
 - Description
 - UPC
 - SKU

The search will return any Inventory matches for the mentioned words having the entered text.

Records Per Page: 10 Search by Name, UPC, SKU or Description

	Product - UPC	SKU	Description	On Hand	Transfer Qty.
<input type="button" value="+ Add"/>	1 x 4 Mahogany Hardwood -		MH Description	10000.0000	<input type="text"/>

Example 1: Searching for “*descript*” will return all matches that have the same text in one of the fields.

	Product - UPC	SKU	Description	On Hand	Transfer Qty.
<input type="button" value="+ Add"/>	t3 - upc t3	sku t3		4.0000	<input type="text"/>

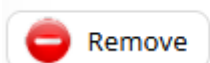
Example 2: Searching for “*SKU*” will return all matches that have the same text in one of the fields. In this case, only one match was made on the SKU field.

INVENTORY TRANSFER: CONDITIONS

- The system will allow only Inventory Items that have a positive On Hand Quantity.
- An “+ Add” Button will be presented on items that can be transferred.
- The Inventory Items can reach 0 On Hand Quantity after the transfer is complete.
- The inventory items cannot reach a negative On Hand Quantity after the transfer is complete.
- If a Transfer Quantity entered is greater than (>) the On Hand Quantity, it will not be present in the Transfer Confirmation screen since it violates the previously mentioned conditions.

After an item is selected a “- Remove” button will be shown to clear the item selection and entered quantity.

THE “TRANSFER QTY.” FIELD WILL BE ENABLED TO ENTER INTEGERS ONLY. A VALIDATION WILL BE VISIBLE WHEN ENTERING A NON-NUMERIC CHARACTER.

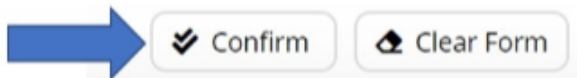


t3 - upct t3

sku t3

A pop-up window titled "Transfer Qty." with a text input field containing the letter "a". Below the input field, a red error message reads "Qty. must be between 1 and 9999".

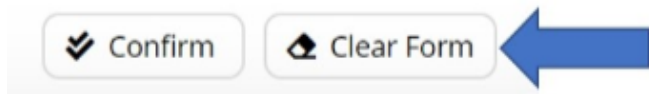
CONFIRM BUTTON



When pressed a pop-up window will present the following information:

- Originator (From) Location
- Destination (To) Location
- Valid quantified Items to be transferred between locations.

CLEAR FORM BUTTON



- Will reset the current form clearing all fields and inventory selected.
- Is a mechanical reset of the whole form.

TRANSFER CONFIRMATION POP-UP SCREEN

Confirm Transfer

From: Main Warehouse → To: Retail Location

Product - UPC	SKU	Description	On Hand	Transfer Qty.
t3 - upc t3	sku t3		2.0000	1

* Items that their transfer would result in a negative stock on their original location will not be transferred.

 Transfer  Close

Provides a summary of the Inventory Transfer as composed by the user.

- The composed transfer is NOT complete yet.
- On its header it presents the Emissary and Recipient locations that the Transfer will correspond.
- A grid with all the valid Inventory Item Transfers is presented.
- A reminder message is presented to the user noting that all items that would amount to negative values are not considered for transfer.

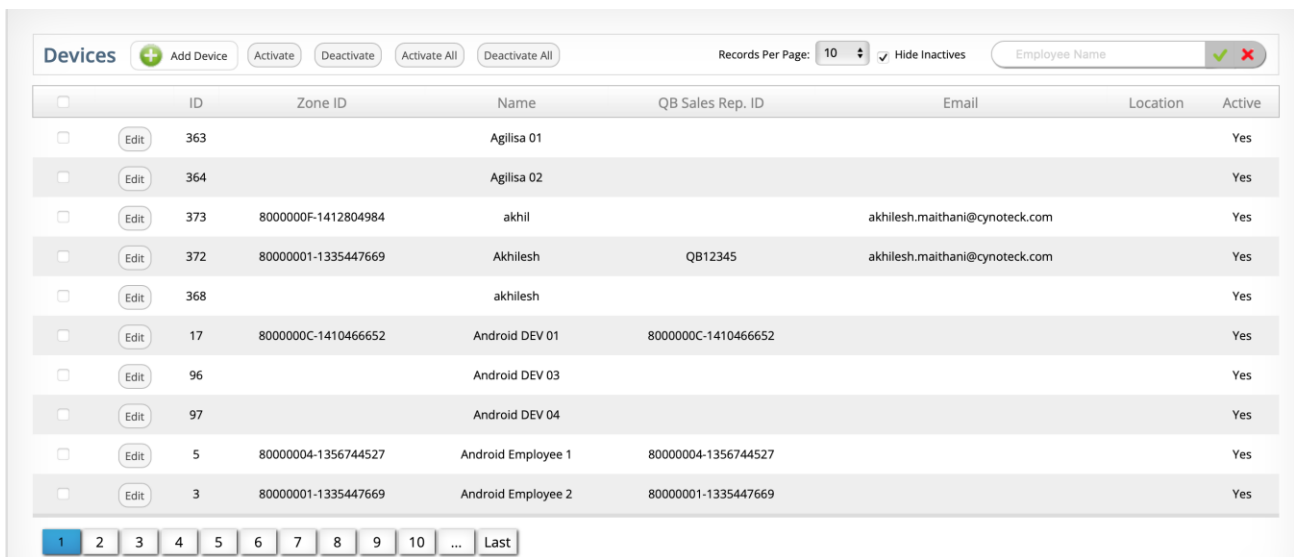
“TRANSFER” BUTTON

- When pressed a window is prompted to the user to confirm and proceed with the listed inventory Transfer.
- Its confirmation will trigger the Inventory Transfer execution until completion. ○ on completion the pop-up screen will disappear, and the user will be returned to the Inventory Transfer main screen.

“CLOSE” BUTTON

- Provides a way to dismiss the Pop-Up window and return to the pending Inventory Transfer for further modification until the user is satisfied and set to Transfer the Inventory Transfer.

This section of the BackOffice is one of the most notable features of this web-based administrative system. The module will not only highlight the people who are going to be using the devices, but it is where specific devices are assigned to those people. Using this feature, you can also see a list of available employees that have been either uploaded from the accounting software (Sales Reps) or created within the BackOffice. You can create a Device User who will be assigned to work on a specific Android/iOS device with the eMobilePOS App in the Add Device User sub-section.



ID	Zone ID	Name	QB Sales Rep. ID	Email	Location	Active
363		Agilisa 01				Yes
364		Agilisa 02				Yes
373	8000000F-1412804984	akhil		akhilesh.maithani@cynoteck.com		Yes
372	80000001-1335447669	Akhilesh	QB12345	akhilesh.maithani@cynoteck.com		Yes
368		akhilesh				Yes
17	8000000C-1410466652	Android DEV 01	8000000C-1410466652			Yes
96		Android DEV 03				Yes
97		Android DEV 04				Yes
5	80000004-1356744527	Android Employee 1	80000004-1356744527			Yes
3	80000001-1335447669	Android Employee 2	80000001-1335447669			Yes

IF THE EMOBILEPOS APP IS LINKED TO ACCOUNTING SOFTWARE, THEN THE EMPLOYEES SHOULD BE MANAGED WITHIN THE ACCOUNTING SOFTWARE. MAKE SURE THAT THE EMPLOYEES CREATED IN THE ACCOUNTING SOFTWARE ARE ASSIGNED AS SALES REPS FOR THEM TO BE ELIGIBLE WHEN INITIALIZING THE APPLICATION.

When creating an Employee/Device User, you have the option of assigning them types. The employee type will determine if the employee simply uses the device or is assigned to the device.

There are two (2) types of user roles for Devices:

- Regular employee
- Supervisor

The difference between Regular employees and supervisors is their privileges within the app. A device assigned as a supervisor will not ask for administrative passwords within the app.

The screenshot shows the 'Add Device User' form with the 'User Info' tab selected. The form contains the following fields and options:

- Name:
- Email:
- QB Sales Rep. ID:
- Register Number:
- Download Location Inventory only:
- Class:
- VAT:
- Type: - Price Level Default:
- Sales Tax Area:
- Zone ID:

A hint at the bottom reads: "HINT: You must save this record before entering other's tab data." Below the hint are 'Save' and 'Cancel' buttons.

To add a device user, move the mouse cursor over the Employee tab and click on Add Device User. This will take you to the User Info screen, where you will fill in the information fields for your new employee.

- *Name* – Name of User or Device
- *Email* – Email of User
- *QB Sales Rep. ID* – (Leave blank. For Accounting Software Only)
- *Register Number* – (Leave blank. Auto generated)
- *Download Location Inventory only* – If you are using Locations, set it to **YES**, if not, set it to **NO**.
- *Class* – (Leave as is)
- *Type* – Select the appropriate
- *Status* – Leave as Active.
- *Price Level Default* – To force the User/Device to select the appropriate Price Level
- *Default Tax* – To force the User/Device to select the appropriate Tax.
- *Zone ID* – For sorting customers list by User/Device

After you fill in the information, click on the **Save** button at the bottom.

ⓘ THE NEW DEVICE USER RECORD MUST BE SAVED BEFORE BEING ABLE TO ENTER AND CONFIGURE THE “MANAGE ZONES” AND “MERCHANT TAX ID” TABS

EMPLOYEES

In this section, you can manage your cashier, clerks, and other personnel. The Employees section shows the list of available employees/device users that have been either uploaded from accounting software or created within the BackOffice.

ID	Name	QB Sales Rep. ID	Email	Active
6	iOS Employee 1	8000005-1356803415		Yes
9	Clerk 1			Yes
13	Android Employee 3	8000008-140866600	support@emobilepos.com	Yes
19	Android Employee 4	800000F-1412804984		Yes
28	Clerk 2	1		Yes
38	test clerk			Yes
42	Clerk 3			Yes
49	Chef			Yes
50	Mesero			Yes
51	Bartender			Yes

Once selected, you can create an Employee/Device User by pressing the “+Add Employee” button. This will take you to the User Info screen, where you will fill in the information fields for your new employee.

User Info | Manage Zones | Merchant Tax ID

User Info

Name:	Type:	Role:
<input type="text" value="Clerk 1"/>	<input type="text" value="Clerk"/>	<input type="text" value="Supervisor"/>
Email:	Status:	<ul style="list-style-type: none"> -- Select -- Waiter Kitchen Manager Bartender Supervisor test role Salesman north test role south test role Lavador Dishwasher Cashier Cash Register
<input type="text"/>	<input type="text" value="Active"/>	
QB Sales Rep. ID:	Price Level Default:	
<input type="text"/>	<input type="text" value="None"/>	
Register Number:	Sales Tax Area:	
<input type="text" value="80000029-1379014326"/>	<input type="text" value="None"/>	
Download Location Inventory only:	Zone ID:	
<input type="text" value="No"/>	<input type="text" value="None"/>	
Class:	Clerk Password:	
<input type="text" value="None"/>	<input type="text" value="531"/>	

VAT:

When creating an Employee/Device User, you have the option of assigning them roles. The employee role will determine the permissions the device user will have when using the eMobilePOS app.

USER INFO TAB

- *Name* – Name of Employee
- *Email* – Email of Employee
- *QB Sales Rep. ID* – (Leave blank. For Accounting Software Only)
- *Register Number* – (Leave blank. Auto generated)
- *Download Location Inventory only* – If you are using Locations, set it to YES, if not, set it to NO
- *Class* – (Leave as is)
- *Type* – Select the appropriate
- *Roles* – Assign roles based on the required use or permissions of the user.
- *Status* – Leave as Active.
- *Price Level Default* – To force the User/Device to select the appropriate Price Level
- *Default Tax* – Forces the User/Device to select the appropriate tax
- *Zone ID* – For sorting customers list by User/Device

After you fill in the information, click on the **Save** button at the bottom.

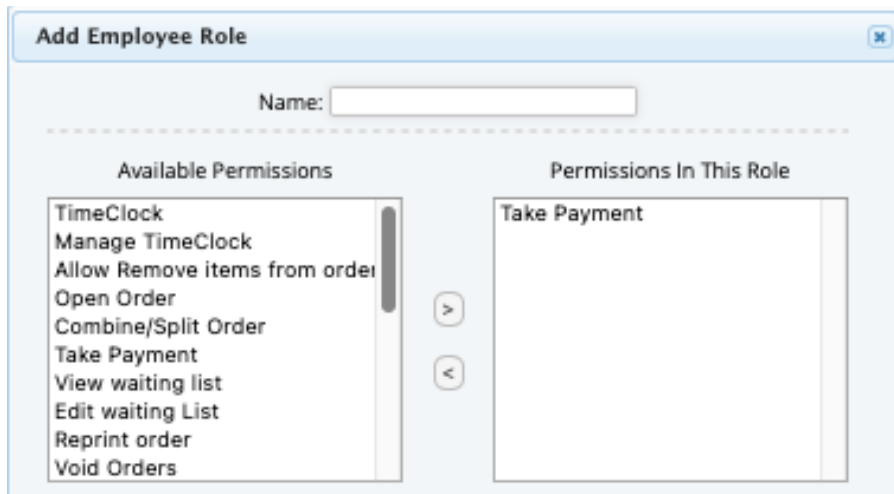
ADDING AN EMPLOYEE USER

1. Login to the **BackOffice**.
2. Go to Management> Employees> Add Employee
3. Write the information required.
4. Assign the TYPE as Clerk.
5. Create the clerk Password. When creating clerks, remember to assign different passwords for every clerk.
6. After you fill in the information, click on the **Insert** button at the bottom.

Within this section, you will find the tools and features necessary for the management and regulation of your employees' access and permissions within the system. It serves as the central hub for configuring and controlling the various levels of authorization and entitlements granted to specific users. Once selected, you can create a new role by pressing the **Add New** button.



This will take you to the Add Employee Role window, where you will add the desired permissions for each role. Create a different name for each role. After assigning the permissions to the role, proceed to save the changes by pressing, “Update.” Note that these permissions can be modified at any time.



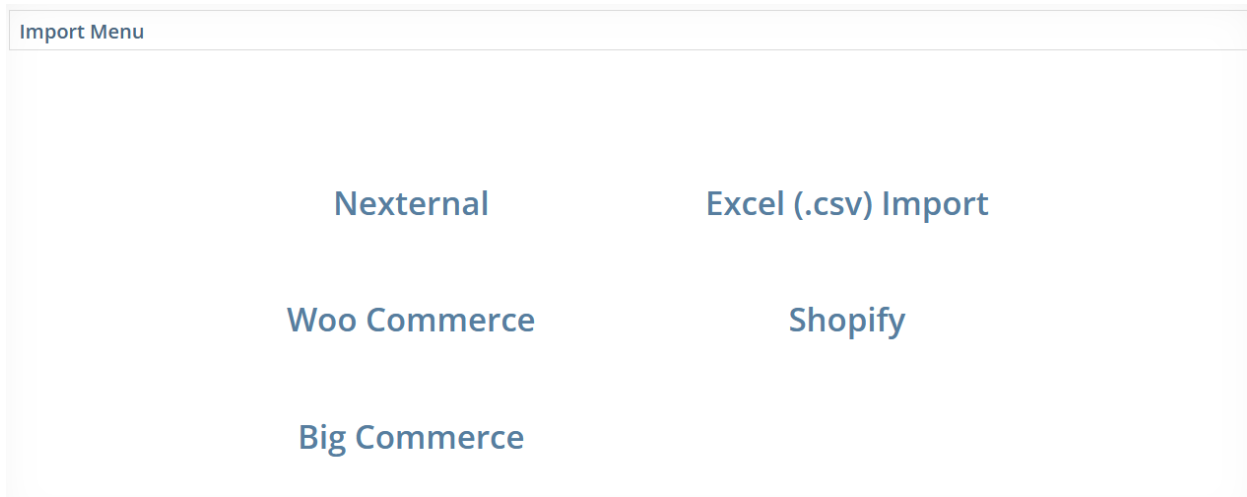
IMPORT


This is where the import schedule for Nexternal, WooCommerce, Shopify, and Big Commerce interfaces are located, as well as the Excel import tool.

The Excel import tool will allow merchants that are not linking an accounting or ERP system to the BackOffice, to do bulk uploads of information (products, price levels, categories, and customers).

Each type of bulk upload requires the merchant to download an Excel template document that has the format required to import the desired information to the BackOffice.

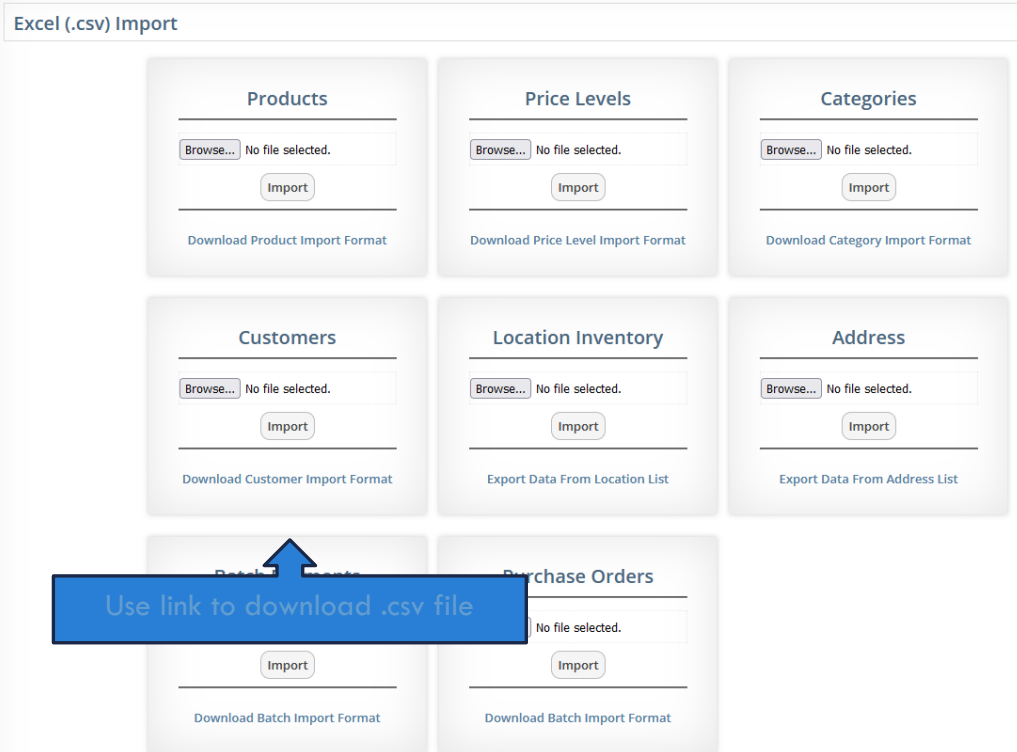
Next, we will explain the product upload template and its fields to understand what information needs to be typed for the upload.



 EFFICIENTLY IMPORTING DATA IS A FUNDAMENTAL ASPECT OF BUSINESS OPERATIONS. THIS FEATURE PROVIDES TOOLS TO EASILY BRING IN EXTERNAL DATA, UPDATE DATABASES, AND MAINTAIN ACCURATE RECORDS.

IMPORT: USING THE EXCEL IMPORT TOOL

To use the Import tool, please do the following:



1. Go to the Import icon in the BackOffice and choose Excel (.csv) Import Option.
2. Once on this page download the import format that is going to be used. (ex. Products)
3. Once you download the import format file, open it in Microsoft Excel and fill in the information according to what you want to upload: Do not leave an empty row between items added in the field as it is required to have an ID for the product, price level, customer, or category
4. Once you have finished entering the information, save the document and go to the import options section.
5. Click on the browse button below the desired import item (products, price levels, categories, or customers)
6. Locate the file where you saved it and select ok. Your file will then be uploaded to the BackOffice.

IMPORT: PRODUCT TEMPLATE

Once you download the import format file, open it in Microsoft Excel and fill in the information according to what you want to upload:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	ID	CatId	SKU	UPC	Name	Desc	On hand	Price	Cost	Tax Code (Y/N)	Tax Type	Is Active	Show Online	Price Points	Value Points	Image Url
2																
3																

- **ID** – Unique ID of the Product. Necessary to edit the price/name of a product after creation. If this ID changes it will duplicate the item, thinking it is a different (new) item. (Required)
- **Cat Id** – For use in conjunction with the Categories Template. Will determine if this item will be inside a category. (Optional)
- **SKU** – If the product will have a Stock-Keeping Unit code. (Optional)
- **UPC** – If the product will have a Universal Product code. (Optional)
- **Name** – Name of the item. (Required)
- **Desc** – Description of the item. (Optional)
- **On hand** – Quantity of the item in stock. (If you will oversee inventory) (Optional)
- **Price** – Price of the item. (Required)
- **Cost** – Cost of the item. (Optional)
- **Tax Code (Y/N)** – If an item will be taxable. (Just put Y for yes or N for no) (Required)
- **Tax Type** – If your business manages products with different taxes. Leave it blank if not. (Needs to be configured) (Optional)
- **Is Active** – If the item will be shown in the device or not. (Just put “1” for yes or “0” for no) (Required)
- **Show Online** – For use with Tupyx. (An app for selling online) (Subscription Required) (Optional)
- **Price Points** – For Loyalty Cards. To assign value points when a customer purchases the item. (Optional)
- **Value Points** – For Loyalty Cards. Points are needed to redeem items with accumulated points. (Optional)
- **Image URL** – For uploading the picture of the item if the picture is located on the internet. (Optional)

VENDORS

This section is for managing, creating, and editing vendors, the supply chain that makes goods and services available to your company.

- Vendors must be added to the system to assign products and create Purchase Orders.
- To add a new Vendor the user must navigate to Management -> Vendors and press the NEW VENDOR button.



	Company Name	Remittance	Telephone	Email	Active
<input type="button" value="Open"/>	Akhilesh Maithani	Akhilesh Maithani	9634272621	akhi@gmail.com	True
<input type="button" value="Open"/>	BONORTH	Pablo J Rivas	7871234567	privas@e-nablercorp.com	True
<input type="button" value="Open"/>	BOSOUTH	Pablo J Rivas	7872341234	privas@e-nablercorp.com	True

The preceding action will open a pop-up window with the following fields:

Add Vendor
✕

Contact Information

Company Name: <input type="text"/> Name: <input type="text"/> Balance: <input type="text"/> Limit: <input type="text"/>	Salutation: <input type="text"/> First Name: <input type="text"/> Middle Name: <input type="text"/> Last Name: <input type="text"/>	Active: <input checked="" type="checkbox"/> Telephone: <input type="text"/> Email: <input type="text"/> Fax: <input type="text"/>	Is Taxable?: <input type="text" value="None"/> Tax Code: <input type="text" value="None"/> Price Level: <input type="text" value="None"/> Terms: <input type="text" value="None"/>
--	--	---	---

Business Address

Street 1: <input type="text"/> Street 2: <input type="text"/> Street 3: <input type="text"/>	City: <input type="text"/> State: <input type="text"/> Country: <input type="text" value="World"/>	Business ZIP Code: <input type="text"/>
---	---	--

Remittance Contact

Contact Name: <input type="text"/> Street 1: <input type="text"/> Street 2: <input type="text"/> Street 3: <input type="text"/>	City: <input type="text"/> State: <input type="text"/> Country: <input type="text" value="World"/>	Business ZIP Code: <input type="text"/>
--	---	--

To edit an existing Vendor, press the **Open** button to the left of the record to be edited.

Edit Vendor

Contact Information

Company Name: <input type="text" value="Test"/>	Salutation: <input type="text"/>	Active: <input checked="" type="checkbox"/>	Is Taxable?: <input type="text" value="None"/>
Name: <input type="text"/>	First Name: <input type="text"/>	Telephone: <input type="text" value="7871234567"/>	Tax Code: <input type="text" value="None"/>
Balance: <input type="text" value="0.0000"/>	Middle Name: <input type="text"/>	Email: <input type="text" value="test@test.com"/>	Price Level: <input type="text" value="None"/>
Limit: <input type="text" value="0.0000"/>	Last Name: <input type="text"/>	Fax: <input type="text"/>	Terms: <input type="text" value="None"/>

Business Address

Street 1: <input type="text" value="Calle 1 A"/>	City: <input type="text" value="San Juan"/>	Business ZIP Code: <input type="text" value="00918"/>
Street 2: <input type="text"/>	State: <input type="text" value="PR"/>	
Street 3: <input type="text"/>	Country: <input type="text" value="World"/>	

Remittance Contact

Contact Name: <input type="text" value="Test"/>		
Street 1: <input type="text" value="Calle 1 A"/>	City: <input type="text" value="San Juan"/>	Business ZIP Code: <input type="text"/>
Street 2: <input type="text"/>	State: <input type="text" value="PR"/>	
Street 3: <input type="text"/>	Country: <input type="text" value="World"/>	

PURCHASE ORDERS

This section is where you create and review inventory purchase orders. Purchase orders (POs) are documents sent from you, as the buyer, to a supplier with a request for products or services as an order.

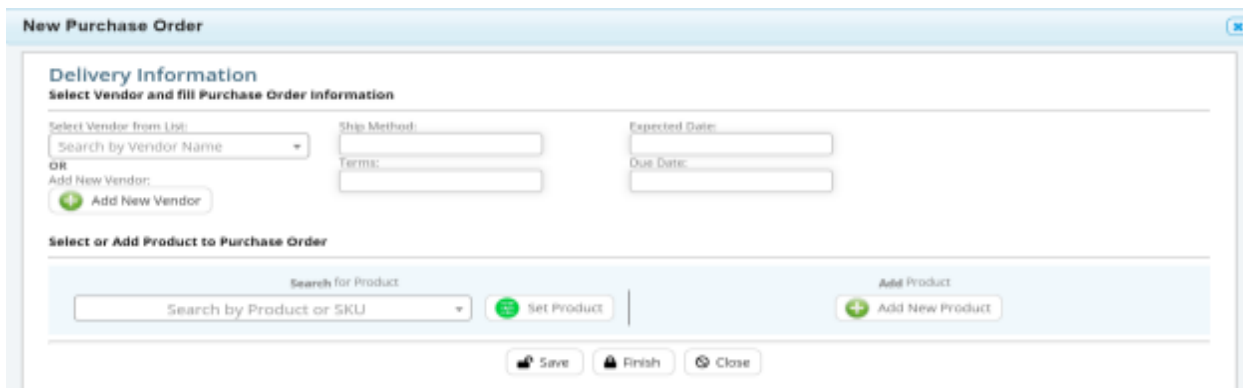
Each PO will include a number for tracking the purchase order throughout the system, as well as the type of item, quantity, and agreed-upon price.



The screenshot shows a table with the following columns: Status, PO #, Vendor, Total Amount, Item Qty., and Expected Date. There are three rows of data, all with a status of 'Open' and a lock icon.

Status	PO #	Vendor	Total Amount	Item Qty.	Expected Date
Open	11-00135-2018	BOSDUTH	\$140.00	2	10/26/2019 12:00:00 AM
Open	11-00135-2018	BONDORTH	\$4.91	1	10/26/2019 12:00:00 AM
Open	11-00135-2018	BONDORTH	\$22.49	2	10/19/2019 12:00:00 AM

To create a new Purchase Order, press the button labeled “+ New PO”



The form is titled 'New Purchase Order' and is divided into two main sections: 'Delivery Information' and 'Select or Add Product to Purchase Order'. The 'Delivery Information' section includes fields for 'Select Vendor from List' (with a search dropdown), 'Ship Method', 'Expected Date', 'Terms', and 'Due Date'. There is an 'Add New Vendor' button. The 'Select or Add Product to Purchase Order' section includes a 'Search for Product' dropdown, a 'Set Product' button, and an 'Add Product' section with an 'Add New Product' button. At the bottom, there are 'Save', 'Finish', and 'Close' buttons.

The first field offers the option to select a Vendor for which the Purchase Order will be created. This will set the Purchase Order recipient. A Purchase Order can only be directed to a single vendor.

The following are the options for Shipping Method and Terms which will set the values for the Purchase Order being created. The Expected Date will set the receiving date of the Products being ordered. The Due Date is the time limit for the negotiated delivery of the ordered Goods. Both options are set to be selected for a date in the future since the Purchase Order cannot be created for a past date.

Add Purchase Order

Delivery Information

Vendor:

Ship Method:

Expected Date:

Terms:

Due Date:

Add Product to Purchase Order

1) Search for Product 2) Press button to configure & add Product

The Products that can be selected are the ones assigned to the initially selected Vendor. They can be searched and narrowed down by typing the Product Name or by scrolling down with the vertical navigation bar.

To be able to re-stock a Product via a Purchase Order it must be part of a Location's Inventory. All Purchase Orders and Receiving Documents will correspond to each Product's assigned Location for its stock Quantity.

Add Purchase Order

Delivery Information

Vendor:

Ship Method:

Expected Date:

Terms:


Due Date:

Add Product to Purchase Order

1) Search for Product 2) Press button to configure & add Product

- Marquesa Almontra -
- Marquesa Blanca -**
- Marquesa Chocolate -
- Marquesa Coco -
- Marquesa Criolla -
- Marquesa Galleta -

THE PRODUCTS SECTION

The  **PRODUCTS** feature is a crucial component responsible for managing and displaying information about the available products within an organization. It serves as a central repository for tracking and presenting detailed product data. The products feature has the following subsections:



PRODUCTS



ATTRIBUTES



REQUIREMENTS



CATEGORIES



STYLES



PRICE LEVELS



LINKED PRODUCTS



MIX AND MATCH

This section provides a comprehensive display of all products and/or services that have been either created within the BackOffice platform or uploaded directly from your accounting software, offering a comprehensive overview of your inventory and offerings.

It contains the following:

New Product: create a new product or service.

Activate: Activate the product. (If the product is inactive, need to uncheck the "Hide Inactive box")

Deactivate: Deactivate the product. (If the product is active)

Activate All: Activate all inactive products.

Deactivate All: Deactivate all active products.

Export .CSV: Export a CSV (Comma Separated Values) template with all the products for review and editing. (Can be later imported using the import tool)

Records Per Page: This lets you change the number of products you can see per page. (10, 25, 50, or 100 items per page)

Hide Inactive: To hide inactive products. This is checked by default. (If you want to display inactive products, uncheck this box)

Search Bar: To search for products on the list by name or SKU number.

ID: Unique ID of the product. This is automatically generated by the BackOffice if the item is created by using the option on this page. If you are using the Import Tool, you can add your ID to the product. If you are using accounting software, it will be auto generated by the accounting software.

SKU: A stock-keeping unit (SKU) scannable bar code. This allows you to automatically track the movement of inventory by using a scanner.

Category: To categorize products. Useful for enabling quick product lookup when executing a transaction.

Name: Name of the product.

Description: Description of the product.

Qty OnHand: Product Quantity. (For Accounting Software use) To deduct inventory (Qty OnHand) from this section when doing Sales/Transactions, the setting "Affect Main inventory OnHand on Sales" needs to be activated in the eMobilePOS settings.

Price: Product price.

Cost: Product cost.

Active: If the product is active.

Update: Display the last time the product was updated in the BackOffice.

Check Box: To select the product. (To follow up with either Activate or Deactivate)

Open: To open the product for editing.


ADD PRODUCTS WINDOW

In this sub-section, you can fill in various information fields and click on Insert to add the product(s) to the products list.

The screenshot shows the 'Add Product' window with the 'Item Detail' tab selected. The window title is 'Add Product'. Below the title bar, there is a navigation menu with tabs: 'Item Detail', 'Images', 'Video', 'Price Levels', 'Additional Order Attributes', 'Addons', 'Attributes', 'Recurring Billing', 'Linked Items', 'Categories', 'Membership', 'Vendors', and 'Aliases'. The 'Item Detail' tab is active, and the 'UOM' field is visible. The main content area is titled 'Item Detail' and contains the following fields and options:

- Foodstamps Permitted:
- Type: Expense Gift Card None
- Name:
- On Hand:
- Price:
- Cost:
- SKU:
- UPC:
- Accumulation value:
- Redeeming Points:
- Type:
- Disc. Type:
- Cat. ID:
- Show in Online Store:
- Style:
- Is Taxable?:
- Tax Code:
- Is Active:
- Mix And Match Group:
- Description:
- Extra Description:

At the bottom of the window, there are 'Insert' and 'Cancel' buttons.

The  New Product button provides a different means of adding products instead of using the Product template.

ADD PRODUCT TAB: ITEM DETAIL

To add a product to your list, click on and fill out the required information in the tabs. After adding the product, you will be able to access the other tabs marked in gray.

This contains the following:

Name: Name of the item (*Required*)

On hand: Quantity of the item in stock (If you will oversee inventory) (*Optional*)

Price: Price of the item or the Value of percentage when type is Discount (Use only numbers) (*Required*)

Cost: Cost of the item (*Optional*)

SKU: If the product will have a Stock-Keeping Unit code (*Optional*)

UPC: If the product will have a Universal Product code (*Optional*)

Accumulation Value: For Loyalty Cards. To assign value points when a customer purchases the item. (*Optional*)

Redeeming Points: For Loyalty Cards. Points are needed to redeem items with accumulated points. (*Optional*)

Desc/Extra Description: Description of the item (*Optional*)

Type: Type of product (**Inventory, Assembly, Service, Discount**)

Disc. Type: The type of discount (If the type of product will be a discount) Set the discount to a Fixed (Dollar amount) or Percentage (% Percent)

Cat. ID: For use in conjunction with the Categories. Will determine if this item will be inside a category. (*Optional*)

Show in Online Store: For use with Tupyx (An app for selling online) (Subscription Required) (*Optional*)

Is Taxable? If an item will be taxable

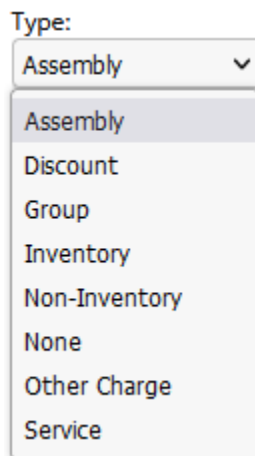
Tax Code: If your business handles products with different taxes. Leave it blank if not. (Needs to be configured) (*Optional*)

Is Active: If the item will be shown in the device or not.

Mix and Match Group: If the item will be a part of a Mix and Match sale (i.e., Buy one, get one free) (Needs to be configured)

Here is an example of how to add a product:

1. Click on New Product
2. Add the Name of Product
3. On Hand: Add Quantity of the product (*Optional*)
4. Add the Price of the product (*Required*)
5. Select “type” Inventory or the appropriate
6. Select Is “Taxable” if you are dealing with taxable products
7. Write a Description for the Product (*Optional*)
8. To finish, click insert (*Do not click twice, it will duplicate the Discount/Product created*)



An item is anything that your company buys, sells, or resells during the business, such as products, shipping and handling charges, discounts, and sales tax (if applicable). Item types are used in BackOffice to classify each item.

If you are linking accounting software to the BackOffice, such as **QuickBooks** or **Peachtree**, these item types are already synchronized. But, for those who are not going to be linking any accounting software, here are the definitions of what each item type available in the TYPE field are:

- *Assembly*: Assembled goods you build or purchase, track as inventory, and resell.
- *Discount*: Subtracts a percentage or fixed amount from a total or subtotal. This can be used for line items or the entire order.
- *Group*: A way of associating individual items that often appear together on invoices, and purchase orders, so that all items in the group can be added to the form at one time.
- *Inventory*: Items you purchase, track as inventory, and resell.
- *Non-Inventory*: Items you buy but do not track as inventory (such as office supplies).
- *None*: Select this option if you do not want to define any item type for your product.
- *Other Charge*: These include miscellaneous labor, material, or part charges such as delivery charges, setup fees, service charges, bounced checks, late fees, opening balance, reimbursable expenses, retainers, surcharges, gift certificates, prepayments, retainers, sales tax, and shipping and handling fees.
- *Service*: Services you charge for. Examples include specialized labor, consulting hours, and professional fees.

Once you create a product the information for that product is shown in the BackOffice, whether it was created from the BackOffice, synchronized from the ERP system, or uploaded via import service.

These are the tabs shown on the product detail screen:

- *Item detail*: This is the first tab that you will encounter once you open the product in BackOffice. This shows the basic information about your product.
- *Images*: In this tab, users will be able to upload an image of your product to see on eMobilePOS.
- *Video*: This tab allows users to add a YouTube video link of your product to show from eMobilePOS.
- *Price levels*: From this tab, users will be able to assign a price level for the specific product. If the product came from the ERP system and has been assigned a price level, it will be already assigned automatically.
- *Additional Order Attributes* (Requirements): This tab allows users to assign specific attribute requirements for the product (i.e., serial numbers, lot numbers).
- *Addons*: This tab is where users will assign the product categories used as add-ons to modify a specific product. (Restaurant Mode)
- *Attributes*: This tab is where users will assign the attribute that will differentiate the item from other comparable products (i.e., color, size, etc.)
- *Volume Price*: In this tab, users will get to create the product price based on the quantity volume added to the order.
- *Linked Items*: This allows users to specify a connection or link between more than one item.

- *Categories*: Allows the user to choose from previously created categories to better organize the product catalog and to enable quick product lookup when executing a transaction.
- *Vendors*: In this tab, users will assign a Vendor that will supply this product when creating a Purchase Order (PO)
- *Aliases*: This allows users to add more UPC/SKU numbers to a product for locating the item using a Scanner.

ADD PRODUCTS TAB: IMAGES

To make your product catalog more attractive when using eMobilePOS you have the option of adding images to your products. We do recommend that the image be no bigger than 400 x 400 pixels to not consume the RAM of the Android device when using eMobilePOS. Please note that the **BackOffice** has a built-in feature that optimizes the image resolution to accomplish this.

Here are the steps to upload an image to a product in the BackOffice:

1. Go to the *Products* tab and select *Products*.
2. Search and *Open* your product.
3. Select the *Image* tab.
4. Click on the *Browse* button to search for the image on your computer.
5. Once selected, the **BackOffice** will start loading the image.

Do this with all the products that you want to add images to. Once you finish, remember to do a **RECEIVE** on your mobile device.

ADD PRODUCTS TAB: VIDEO

Adding a video link to your product is also an effective way to show off your product with eMobilePOS. This can be a commercial, a product info video, or simply an instruction video for the specified product to show to the customer. To add a video link please follow the steps below:

1. Look for the video on YouTube and select the *Share* button.
2. Copy the link provided below the video.
3. Go to your **BackOffice** web page.
4. Go to the *Products* tab and select *Products*.
5. Search and *Open* your product.
6. Select the *Video* tab.
7. Click on *Add Video*.
8. Paste the video link and click on *Insert*.

Remember to synchronize (**RECEIVE**) the device when you are finished with all the changes made.

ADD PRODUCTS TAB: ADDITIONAL ORDER ATTRIBUTES

Additional Order Attributes will be added from a specific Product in the same way that an Attribute is added from the *Attributes* section within *Products*. Information on Attribute functions and configurations in the **BackOffice** is available from the *Attributes* section.

ADD PRODUCTS TAB: ADDONS

Just as the name implies *Addons* are additional components that are pre-configured products that can be added during an order to customize the product that a customer will receive. Examples of this include but are not limited to changing the size of a drink for a restaurant order or adding a warranty during the purchase of electronics. (*Addons* functionality limited to Kiosks.)

ADD PRODUCTS TAB: RECURRING BILLING

Recurring Billing functionality is designed to manage and automate the process of charging customers on a regular, predetermined schedule. This is particularly useful for businesses that offer subscription services, memberships, or products with ongoing fees. Here is an overview of the key components and features of a POS system with recurring billing capabilities in the backend:

Billing Frequency: Billing frequency refers to how often a *customer* is charged for a subscription or service. It defines the regular intervals at which payments are collected from the customer.

Common billing frequencies include:

Monthly: Customers are billed once every month.

Quarterly: Customers are billed every three months (once a quarter).

Annually: Customers are billed once a year.

Weekly: Customers are billed every week.

Bi-annually: Customers are billed twice a year.

The choice of billing frequency depends on the nature of the business and the preferences of both the business and its customers.

Billing Length: sometimes referred to as the subscription term or contract length, defines the duration for which a customer has committed to the subscription. It specifies the number of billing cycles or intervals for which the customer will be charged.

Common billing lengths include:

1 Month: Customers commit to the subscription for one month.

3 Months: Customers commit to the subscription for three months.

1 Year: Customers commit to the subscription for one year.

Indefinite/Until Cancelled: *Customers* are billed indefinitely until they choose to cancel their subscription.

Billing length can affect pricing and discounts offered to customers. Longer billing lengths often come with reduced monthly rates or discounts to incentivize longer-term commitments.

Billing Interval: Billing interval is the period between individual billing cycles or charges within the billing length. It determines how often the customer is invoiced within the subscription's overall duration. The billing interval is closely tied to the billing frequency.

For example:

If the billing frequency is "monthly" and the billing length is "1 year" the billing interval would be "1 month"

If the billing frequency is "quarterly" and the billing length is "1 year" the billing interval would be "3 months"

The billing interval ensures that the customer is charged regularly according to the chosen billing frequency during the entire subscription term.

RECURRING BILLING: CREATE RECURRING BILLING ITEMS IN BACKOFFICE.

1. From the menu select Products.



2. Search for the product that will be used for recurring billing.
3. Click on Open to edit the product.
4. Once the product window opens, select the Recurring Billing tab.



5. Set the Billing Frequency, Billing Length, Billing Interval and the Is Active checkbox.
 - a. For a Monthly charge set as the following
 - b. Set Billing Interval as Monthly.
 - c. The Billing Frequency to "1".
 - d. Set Billing Length to "1".

e. Click on update.

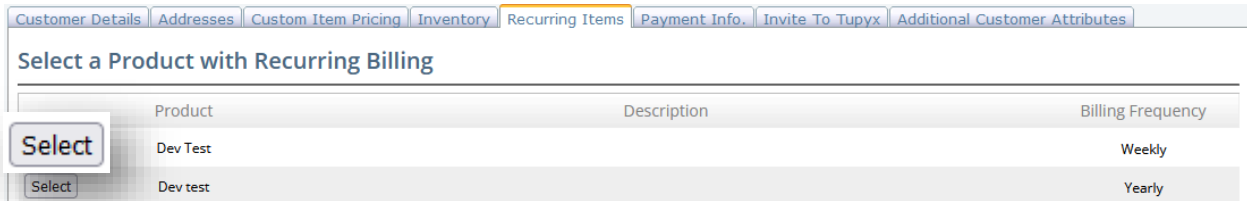
6. Set up the customer.

a. From the Menu select the *Customers* option.

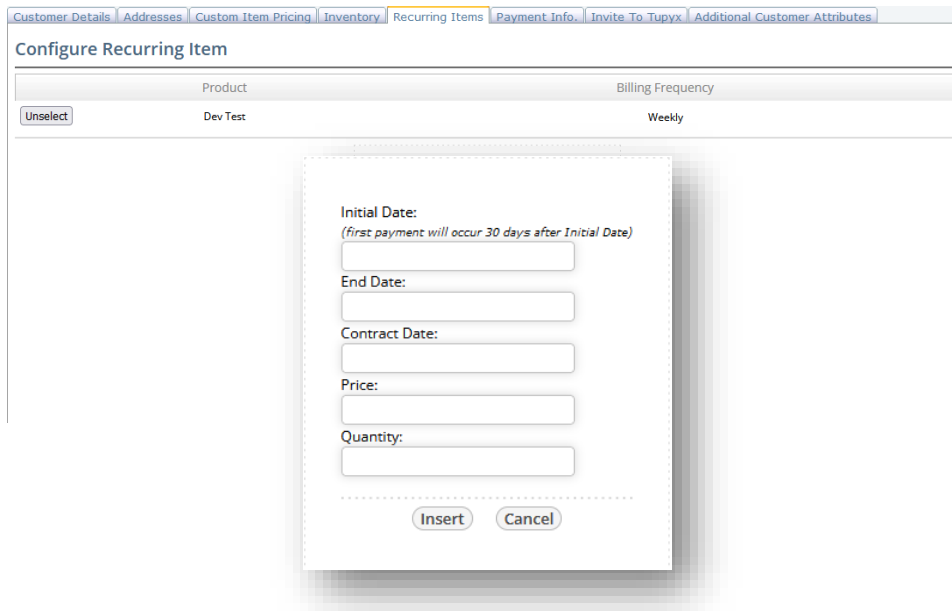
b. Search for the customer record to add the recurring billing items. Click on Edit to open the customer record.



- c. When the edit window opens. Select the *Recurring Items* Tab.
- d. Select the item that will be billed recurrently by clicking on the **Select** button.



- e. The Configure Recurring Item window will appear.

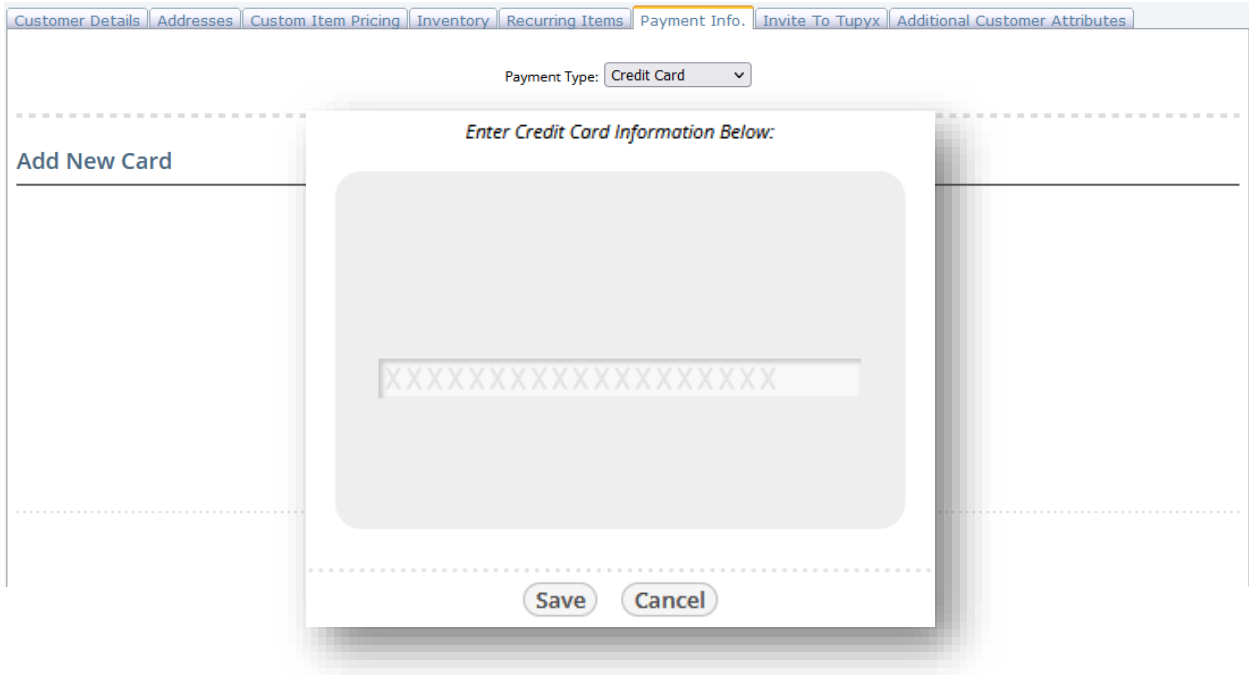


- i. Fill in the Initial date of billing.
- ii. The Contract Date.
- iii. The Price of the item.
- iv. The Quantity.

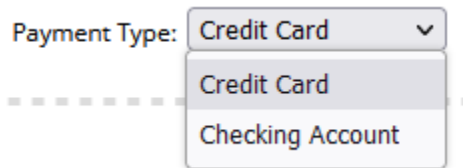
When finished click **Insert**.

7. Add the payment information.

- a. Select the Payment Info tab in the *Customer* window.



- b. Select the payment type. The two options are a Credit Card or a Checking Account.



- c. Fill in the Credit card information or checking account information. Then click save.



ADD PRODUCTS TAB: LINKED ITEMS

In eMobilePOS, *Linked Items* refers to a feature that allows you to associate or link related products or items together in the backend of the system. This association can serve various purposes in a retail or hospitality environment.

Here are examples of common uses for linked items:

- *Combo Meals or Packages:* In restaurants or fast-food establishments, linked items are used to create combo meals or packages. For example, a “Burger Combo” may include a burger, fries, and a drink. By linking these items together in the system, when a customer orders the “Burger Combo” all the linked items are automatically added to the order.
- *Accessories or Add-Ons:* Retail stores often use linked items to suggest or offer complementary products or accessories when a customer purchases a particular item. For instance, when a customer buys a camera, the system can suggest related items like a camera case, memory card, or lens.
- *Modifiers and Variations:* Linked items can be used to manage product variations or modifiers. For example, a pizza restaurant might link different toppings (pepperoni, mushrooms, etc.) to a base item (cheese pizza). When a customer orders a pizza, they can choose the linked toppings as modifiers.
- *Inventory Management:* Linking items can be helpful for inventory management. When you link products that are often sold together, the system can track the stock levels of linked items and adjust them accordingly. This ensures that you do not run out of necessary components.
- *Pricing and Discounts:* Some businesses use linked items to implement pricing or discount rules. For instance, if a customer buys two linked items, they get a discount. The system can automatically apply the discount when the linked items are added to the cart.
- *Cross-Selling and Upselling:* Linked items can be used to encourage cross-selling and upselling. When a customer adds an item to their cart, the system can suggest linked items that complement the chosen product, potentially increasing the sale value.
- *Inventory Kits or Bundles:* Linked items can be used to create inventory kits or bundles. For instance, a “Home Office Kit” could include a desk, chair, and lamp. When a customer purchases the kit, the inventory levels of all linked items are appropriately adjusted.
- *Simplifying Order Entry:* Linking items simplifies the order entry process for cashiers or staff instead of manually searching for related items, they can quickly add linked items with a single selection.

ADD PRODUCTS TAB: CATEGORIES

The categories section is where you will manage your categories and subcategories.

ADD PRODUCTS TAB: VENDORS

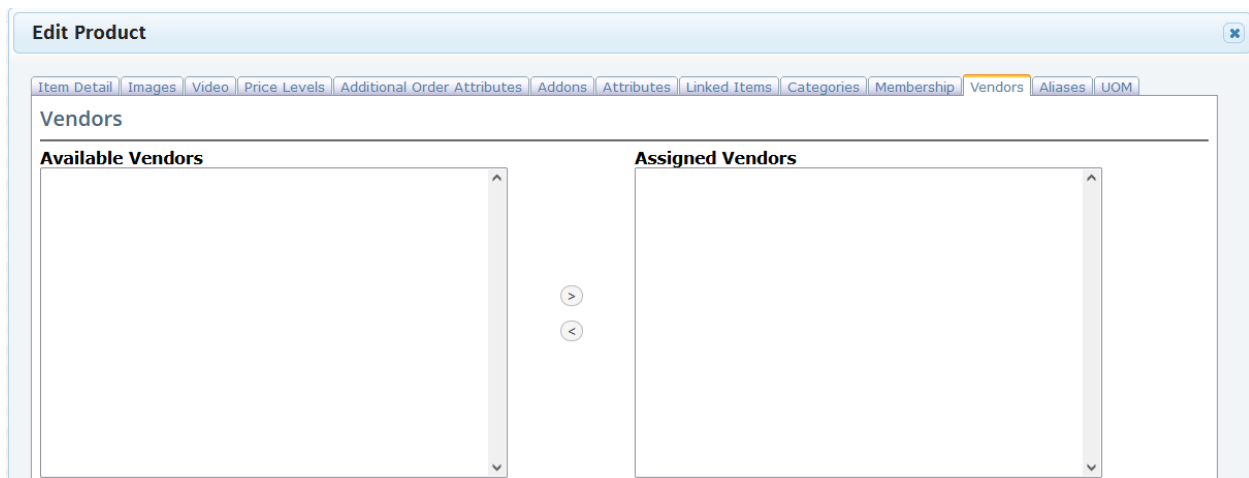
This tab is where you will assign vendors to the products that will be used in purchase orders.

Vendors must be added to the system and available to be assigned to products to be able to create a *Purchase Order*.

To add a *Vendor*, select a *Product* from the grid. Then, open the Details pop-up window and navigate to the *Vendors* tab to set the vendors.

A list of the available *Vendors* will show up on the left-hand side of the window.

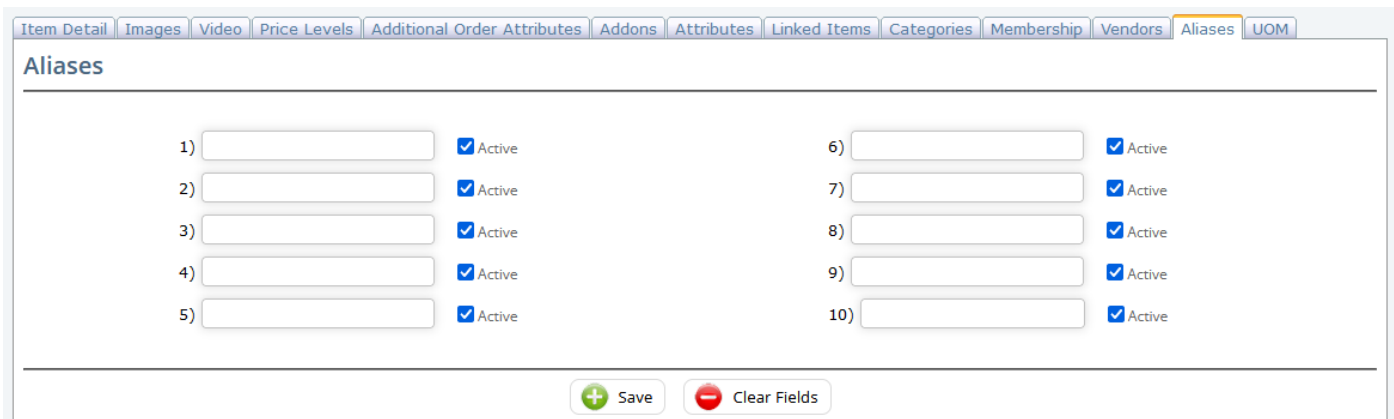
To assign one or more vendors to the product select each desired entry and press the righthand facing arrow button (>). This action will update the assignment of the *Vendor – Product* relationship automatically.



For additional information on adding or creating vendors, please refer to the *Vendors* section.

ADD PRODUCTS TAB: ALIASES

Aliases provide users further ways to identify *Products* from within the **BackOffice** by adding additional search conditions to *Products* in the available data. To keep your product information up to date, you can utilize the Aliases feature available to BackOffice users. This functionality is particularly useful for updating *SKUs* and *UPCs* but can also be used in certain cases for part numbers that have been changed by the manufacturer. To add the latest information, simply navigate to the *Aliases* tab and input the necessary updates.



The screenshot shows the 'Aliases' tab in the BackOffice interface. It features a header with various tabs: Item Detail, Images, Video, Price Levels, Additional Order Attributes, Addons, Attributes, Linked Items, Categories, Membership, Vendors, Aliases (selected), and UOM. Below the header, the 'Aliases' section contains 10 numbered input fields, each with a checked 'Active' checkbox. At the bottom, there are two buttons: a green '+ Save' button and a red '- Clear Fields' button.

Adding *Aliases* can be done from the *Aliases* tab in the *Edit Product > Item Detail* screen and selecting the *Aliases* tab. 10 spaces are available for additional *SKUs* and *UPCs* to be added and configured to *Products* within the **BackOffice**.

Users need to make sure that the *Alias* is Active by making sure that the checkbox is filled in next to the required *Alias* as seen below:

1) Active

Aliases that would need to be Inactive should be configured as follows:

1) Active

PRODUCTS: ADD A DISCOUNT

The process of adding a discount is the same as adding a Product:

1. Click on New Product
2. Add the Name of Discount
3. Use price as the value of discount
4. Select “type” Discount
5. Select “Disc. Type” *Percent* for percentage or *Fixed* for Dollar amount
6. Select Is “Taxable” if you are dealing with taxable products
7. Write a Description for the Discount
8. To finish, click insert (***Do not click twice***, it will duplicate the Discount/Product created)

The screenshot shows the 'Add Product' form with the following details:

- Title:** Add Product
- Item Detail:** Foodstamps Permitted: Type: Expense Gift Card None
- Name:** Employee 20%
- On Hand:**
- Price:** 20
- Cost:**
- SKU:**
- UPC:**
- Accumulation value:**
- Redeeming Points:**
- Type:** Discount
- Disc. Type:** Percent
- Cat. ID:** None
- Show in Online Store:** Yes
- Style:** N/A
- Is Taxable?:** TAX
- Tax Code:** None
- Is Active:** Active
- Mix And Match Group:** None
- Description:** 20% for Employees
- Extra Description:**
- Buttons:** Insert, Cancel

① IF EMOBILEPOS IS LINKED TO AN ACCOUNTING SOFTWARE IT IS POSSIBLE THAT THESE STEPS MAY CHANGE SLIGHTLY OR ADDITIONAL CONFIGURATION MAY BE NEEDED. PLEASE CONTACT SUPPORT FOR ACCOUNTING SOFTWARE COMPATIBILITY

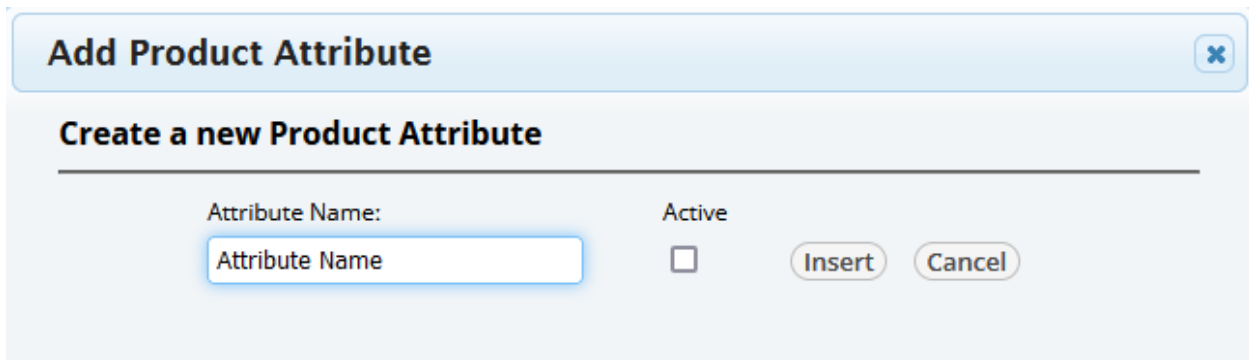
ATTRIBUTES

Product attributes are the descriptors we use to define kinds of products.

For example, we could describe a t-shirt by its color and size. These attributes mean that in the physical world, your store may only carry one red shirt, but you have three sizes or three "variations."

Attributes include size, color, functionality, components, and features that affect the product's appeal or acceptance in the market.

ATTRIBUTES: ADD ATTRIBUTE



Add Product Attribute ✕

Create a new Product Attribute

Attribute Name: Active

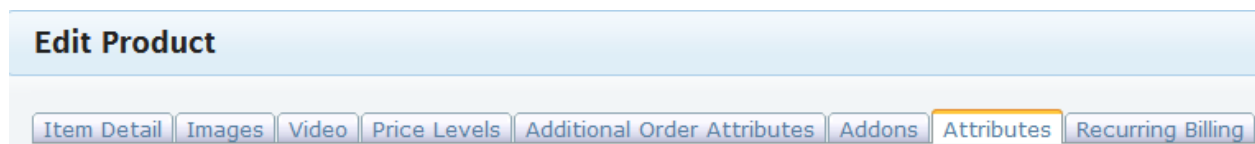
To create a new attribute:

1. Go to the PRODUCTS tab and select ATTRIBUTES.
2. Click on NEW PRODUCT ATTRIBUTE.
3. Enter the new attribute name and mark it as ACTIVE.
4. Click on INSERT.

ATTRIBUTES: ASSIGN ATTRIBUTES TO A PRODUCT

To assign an attribute to a product:

1. Go to the PRODUCTS tab and select PRODUCTS.
2. Search and OPEN your product.
3. Select the ATTRIBUTES tab



4. Select from the Attributes List, Select the attribute checkbox, and enter the attribute description.



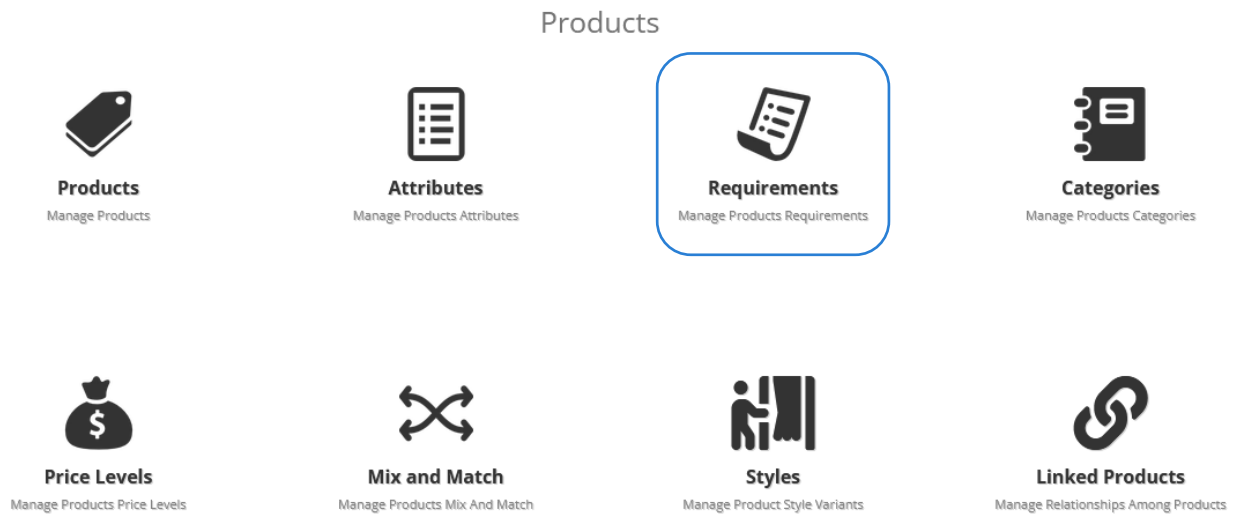
5. click Insert Selected Attributes.
6. Once you finish, remember to do a SYNC/RECEIVE on your mobile device.

You will be able to see the newly created attributes at the bottom of the attributes tab in the product.

The screenshot shows the attributes list after two attributes have been added. It is a table with three columns: 'Attribute Name', 'Attribute Description', and 'Delete'. The first row has 'SIZE' in the 'Attribute Name' column, 'Medium' in the 'Attribute Description' column, and 'Delete' in the 'Delete' column. The second row has 'COLOR' in the 'Attribute Name' column, 'Red' in the 'Attribute Description' column, and 'Delete' in the 'Delete' column.

	Attribute Name	Attribute Description	
Edit	SIZE	Medium	Delete
Edit	COLOR	Red	Delete

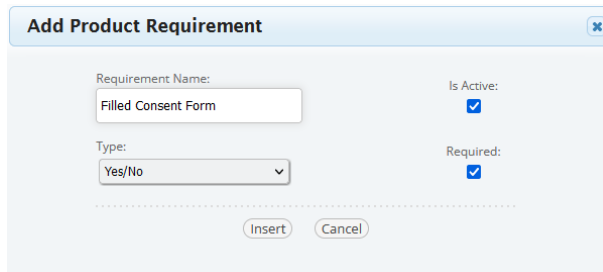
The Requirements section is where you will manage your requirements for adding an item to a sale. Requirements help when you need essential information before selling a product, like a Serial number, or IMEI number, and may also include Age requirements when purchasing a product.



REQUIREMENTS: ADD A REQUIREMENT

To create a new Requirement:

1. Go to the PRODUCTS tab and select REQUIREMENTS.
2. Click on ADD REQUIREMENT.
3. Enter the new requirement name and mark it as ACTIVE and REQUIRED.
4. Select the “Type” for the requirement.
5. Click on INSERT.



The screenshot shows a dialog box titled "Add Product Requirement" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Requirement Name:** A text input field containing "Filled Consent Form".
- Is Active:** A checkbox that is checked.
- Type:** A dropdown menu with "Yes/No" selected.
- Required:** A checkbox that is checked.
- Buttons:** "Insert" and "Cancel" buttons at the bottom.

REQUIREMENTS: ASSIGN A REQUIREMENT TO THE PRODUCT

To assign a Requirement to a product:

1. Go to the PRODUCTS tab and select PRODUCTS.
2. Search and OPEN your product.
3. Select the ADDITIONAL ORDER ATTRIBUTES tab.



4. Select from the Attributes List, mark the "Required" box, and click "Add Selected".
5. Once you finish, remember to do a SYNC/RECEIVE on your mobile device.
6. Configured Requirements will show on eMobilePOS under the "Picker Screen" when selecting a product. (See Section "The Picker Screen")

Products



Products

Manage Products



Attributes

Manage Products Attributes



Requirements

Manage Products Requirements



Categories

Manage Products Categories



Price Levels

Manage Products Price Levels



Mix and Match

Manage Products Mix And Match



Styles

Manage Product Style Variants



Linked Products

Manage Relationships Among Products

The categories section is where you will manage your categories and subcategories.

Categories are important in eMobilePOS as they help you better organize the product catalog and enable quick product lookup when executing a transaction.

You can also add pictures to your categories and subcategories for a better user experience with the eMobilePOS application (only available in Restaurant mode).

CATEGORIES: CREATE A CATEGORY

The screenshot shows a web application interface for creating a category. At the top, there is a header bar with the text 'Product Categories' and a '+ Add Category' button. To the right of the header bar are several utility buttons: 'Activate All', 'Deactivate All', 'Export .CSV', 'Records Per Page: 10', 'Hide Inactives' (checked), and a search field labeled 'Name'. A blue arrow points from the '+ Add Category' button to a modal window titled 'Add Category'. The modal window contains the following form elements:

- Name:** A text input field.
- Status:** A dropdown menu with 'Active' selected.
- Position:** A text input field.
- Parent ID:** A dropdown menu.
- Category Image:** A section with a placeholder box containing the text 'NO IMAGE AVAILABLE'. To the right of the placeholder is the text 'Category Image: (Dimensions: 150 height x 150 width; allowed file types: .jpg, jpeg, and .png)' and a blue button labeled 'Select image to upload'.

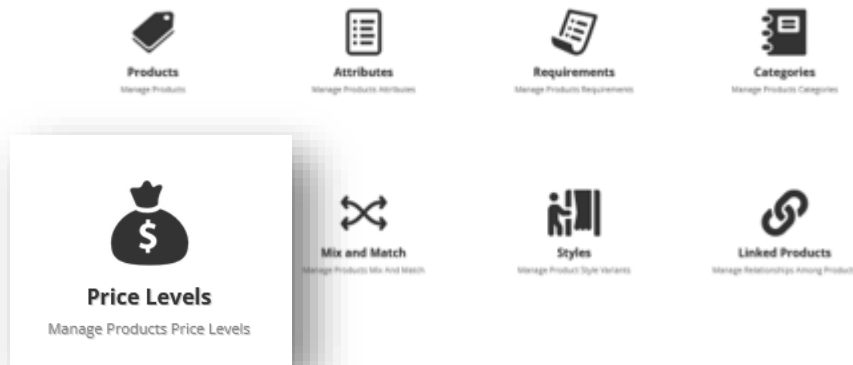
At the bottom of the modal window are two buttons: 'Insert' and 'Cancel'.

To create a category or subcategory:

1. Click Add Category to create/enter a new category name.
2. If this is a subcategory select the main category from the Parent ID drop-down menu.
3. If you want to add an image, click on Choose File, and locate the image for upload.
4. Click Insert.

Now, you can assign a Category to a Product that is available from the Category list within the Products sub-section.

PRICE LEVELS



Adding Price Levels to products from the BackOffice will allow you to have various prices configured to the same Product. For whatever reason you would need to offer different clients/customers a different price level on a product you will be able to configure it in this sub-category.

Once you create a price level and associate it with one or more customers or jobs, each time you create an invoice, estimate, sales receipt, sales order, or credit memo, the Android device automatically pulls up the correct custom price for those customers or jobs. A new Price Level can be created based on a percentage or a fixed price By Item. These price levels can also be applied to an order from the Product Picker screen (in the eMobilePOS App on the device, see [HERE](#)) when adding items to the order. You can also use these price levels and assign them to a specific item in your product list (described later in this section).

The correct configuration of a Price Level is as follows:

1. Create a Price Level
2. Go to a Product and assign the value for the Price Level
3. Assign the configured Product Price Level to a Customer

For merchants integrating eMobilePOS with Nexternal, the customer type/ based pricing is the equivalent of the price levels. Once you choose a customer that has a customer type (i.e., Consumer) then the product catalog will reflect the prices according to the price level. The default customer type/ price level is also important when running the Nexternal Interface.

① IF THE EMOBILEPOS APP IS LINKED TO THE ACCOUNTING SOFTWARE, PRICE LEVELS SHOULD BE MANAGED WITHIN THE ACCOUNTING SOFTWARE.

PRICE LEVELS: CREATE A PRICE LEVEL

The screenshot shows the 'Price Levels' management interface. At the top, there is a toolbar with buttons for '+ Add Price Level', 'Activate', 'Deactivate', 'Activate All', and 'Deactivate All'. To the right, there are settings for 'Records Per Page' (set to 10), a 'Hide Inactives' checkbox (checked), and a search field labeled 'Name'. A blue arrow points from the '+ Add Price Level' button to a modal dialog box titled 'Add Product Price Level'. The dialog box contains the following fields:

- Name:** A text input field.
- Type:** A dropdown menu with 'By Percentage' selected.
- Active:** A dropdown menu with 'Yes' selected.
- Percentage:** A text input field.

At the bottom of the dialog box, there are two buttons: 'Insert' and 'Cancel'.

To create a Price Level:

1. Click Add Price Level.
2. Enter the name for the Price Level. (i.e., Price Level 01 or Base Price)
3. Select the type, By Item or by Percentage.
4. Make sure Active is set to Yes.
5. Click "Insert".

The next step is to go to the products and assign the value for the Price Level.

① IF THE EMOBILEPOS APP IS LINKED TO THE ACCOUNTING SOFTWARE, PRICE LEVELS SHOULD BE MANAGED WITHIN THE ACCOUNTING SOFTWARE.

PRICE LEVELS: ASSIGN PRICE LEVEL VALUE

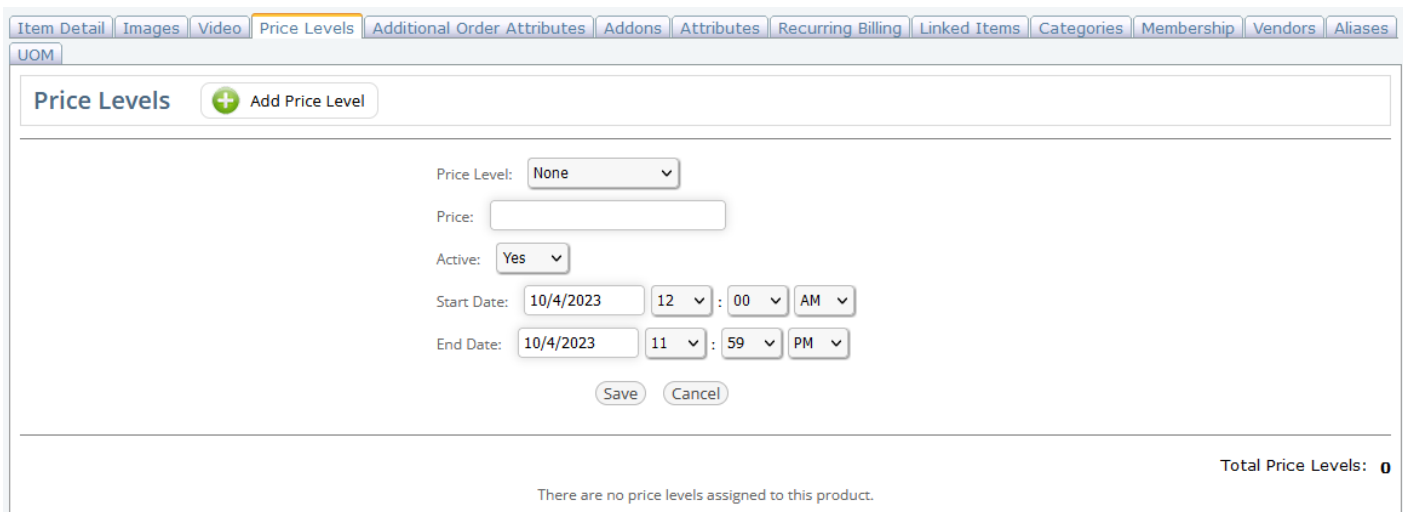
After creating a Price Level, you need to assign the value for each product to that price level.

1. Go to the Products Tab and go to Products.



2. Select the corresponding Product and click “Open”.

3. Open the Price Level Tab inside the product.



Item Detail Images Video **Price Levels** Additional Order Attributes Addons Attributes Recurring Billing Linked Items Categories Membership Vendors Aliases

UOM

Price Levels + Add Price Level

Price Level:

Price:

Active:

Start Date: :

End Date: :

Total Price Levels: **0**

There are no price levels assigned to this product.

4. Click “Add Price Level”.

5. Search for the created price level from the drop-down menu.

6. Set the Price for that corresponding price level.

7. Fill out the rest of the information and click “Save”.

The new Price Level for that product will be displayed at the bottom.

After finishing with all the prices, you will need to assign them to the corresponding customers.

PRICE LEVELS: ASSIGN PRICE LEVEL TO CUSTOMER

Add Customer

Customer Details | Addresses | Custom Item Pricing | Inventory | Invite To Tupyx | Additional Customer Attributes

Customer Details

Company Name:	Phone:	Account Number:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Salutation:	Email:	
<input type="text"/>	<input type="text"/>	
Name:	Fax:	
<input type="text"/>	<input type="text"/>	
Balance:	Zone ID:	
<input type="text"/>	None ▾	
Limit:	Is Active:	
<input type="text"/>	Active ▾	
Company Contact:	Taxable:	
<input type="text"/>	None ▾	
First Name:	Sales Tax Area:	
<input type="text"/>	None ▾	
Middle Name:	Price Level:	
<input type="text"/>	None ▾	

The last step is to assign the Price Level to the customer:

1. Go to the Customer Tab in the BackOffice main menu.
2. Select the corresponding customer and click "Open".
3. Select the Customer Details Tab.
4. Assign the configured Price Level and click "Update".

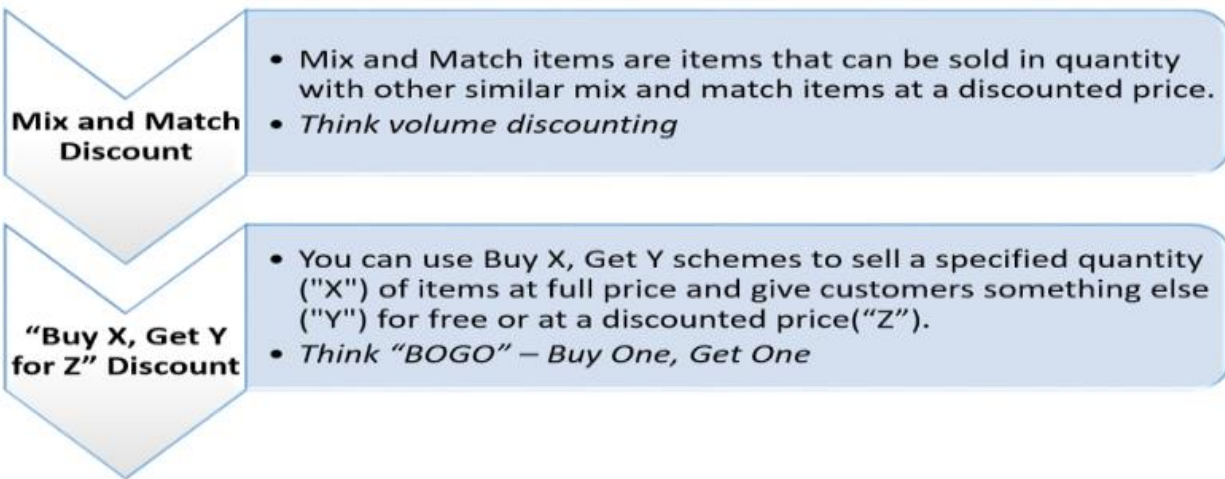
Now, Sync the device by touching the Receive button. When you select that Customer to start a transaction, the Price Level will be shown in the transaction.

ⓘ IF THE EMOBILEPOS APP IS LINKED TO THE ACCOUNTING SOFTWARE, PRICE LEVELS SHOULD BE MANAGED WITHIN THE ACCOUNTING SOFTWARE.

MIX AND MATCH

There are two main groups of these special discount structures:

- *Mix and Match*
- *Buy X and get Y for Z*



There are two types within "*Buy X and get Y for Z*" discounting structure:

Buy X and get Y for Z – Fixed

Sell a specified quantity of items ("X") at full price and give customers something else ("Y") for free or at a specific (\$) price ("Z").

Buy X and get Y for Z – Percent

Sell a specified quantity of items ("X") at full price and give customers something else ("Y") at a discounted (%) Price ("Z")

There are four types within the “**Mix & Match**” discount structure:

- *Mix and Match - Fixed*
 - Use this to give a fixed \$ amount discount when adding a certain number of items to the sale.
 - A discount only applied to the specified group. (Buy three get \$1.00 off each)

- *Mix and Match - Fixed with discount on odd items*
 - Use this to give a fixed \$ amount discount when adding a certain number of items to the sale.
 - A discount is applied to the specified group plus additional items beyond the group. (Buy three or more get \$1.00 off each)

- *Mix and Match - Percent*
 - Use this to give a % discount when adding related items to the sale.
 - A discount is only applied to the specified group. (Buy three get 10% off each)

- *Mix and Match - Percent with discount on odd items*
 - Use this to give a % discount when adding related items to the sale.
 - A discount is applied to the specified group plus additional items beyond the group. (Buy three or more get 10% off each)

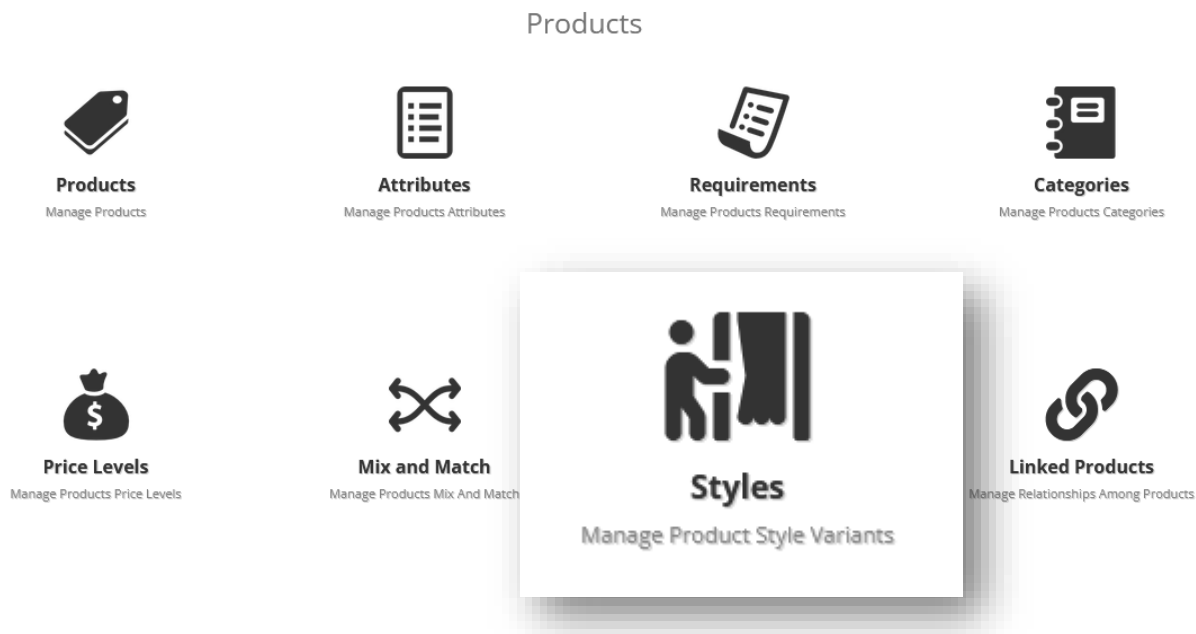
Styles will allow you to configure BackOffice so that differences for the same product can be created as an added layer of modification during the transaction.

Using clothing as an example, with the Styles function, you will be able to modify your transaction from your POS system to be able to select the size of the products you have configured to that style during the transaction.

In practice, you would need to create a product in BackOffice for each size article of clothing in inventory and add these products to the style.

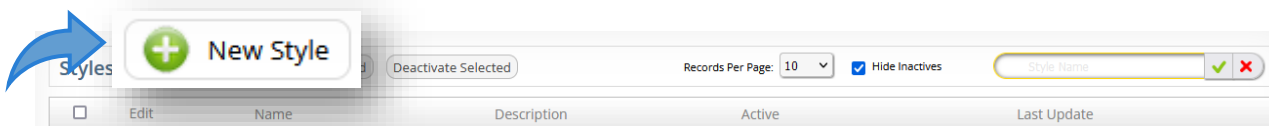
If you would like more information on the creation of products, please go to the *Products* section.

To configure Styles from the **Products** tab you will select the **Styles** module.



CREATING A STYLE

Once inside the **Styles** section of the BackOffice, you will be able to add and edit configured styles. As an example, we will be using a T-shirt as a product. Click on the “+ **New Style**” button from the Styles menu to begin configuring your selected Style.



Users will need to enter the Name of the Style and the Description will be optional, the Active check box will determine whether the Style will be available for selection or not.

Selected Style

Name: *

Active

Description:

+ Save

Once the information is entered as needed click on the “+ Save” button, the new Style can now be found in the Style list.

New Style

Name:

Active

Description:

+ Save

Additionally, from this screen Styles can be Activated and Deactivated by selecting the corresponding check box and selecting either the “**Activate Selected**” or “**Deactivate Selected**” buttons found to the right of the “+ **New Style**” button.

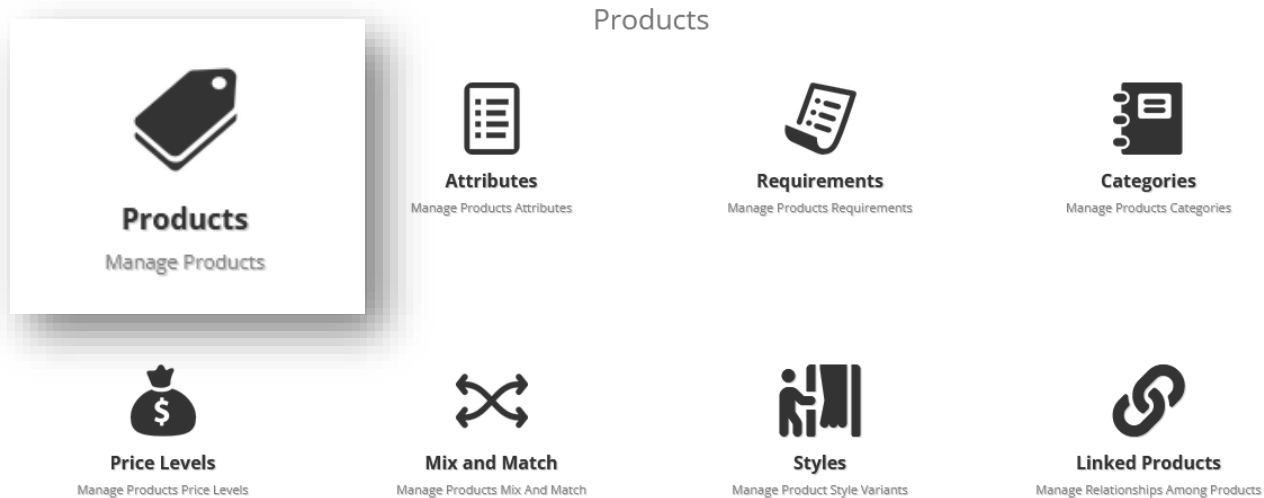
Styles **+ New Style** **Activate Selected** **Deactivate Selected** Records Per Page: 10 Hide Inactives

<input type="checkbox"/>	Name	Description	Active	Last Update
<input type="checkbox"/>	T-shirt sizing	Style created for T-shirt sizing	Yes	10/13/2023 9:06:39 PM

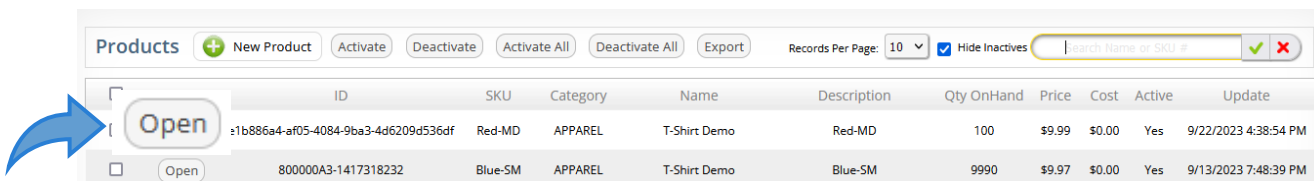
ASSIGNING STYLES

The “styles” can be assigned to specific products. This configuration can be done from the “Products” screen following these simple steps:

1. Navigate to the **Products** tab in the BackOffice and select the **Products** screen.



2. The **Products** screen will populate all your “active” previously configured products. Once at this screen select the product you would like to add the Style to by pressing the “Open” button on the left-hand side of the specific product.



- The edit product screen will open, and the Item Detail tab will give you a series of configuration options including a drop-down for the Style that will be assigned to the product.


The screenshot shows the 'Item Detail' configuration screen. At the top, there is a navigation bar with tabs: Item Detail (selected), Images, Video, Price Levels, Additional Order Attributes, Addons, Attributes, Recurring Billing, Linked Items, Categories, Membership, Vendors, and Aliases. Below the navigation bar, the 'Item Detail' section is visible. It includes a 'Foodstamps Permitted' checkbox (unchecked) and a 'Type' selection with radio buttons for Expense, Gift Card, and None (selected). The main configuration area contains several fields and dropdown menus:

- ID: e1b886a4-af05-4084-9ba3-4d6209d536df
- Name: T-Shirt Demo
- On Hand: 100
- Price: 9.9900
- Cost: 0.0000
- SKU: Red-MD
- UPC: (empty)
- Accumulation value: 0
- Redeeming Points: 0
- Type: Inventory
- Is Taxable?: TAX
- Disc. Type: Fixed
- Tax Code: IVU11
- Cat. ID: APPAREL (inactive)
- Is Active: Active
- Show in Online Store: No
- Mix And Match Group: None
- Style: T-shirt sizing (highlighted)
- Extra Description: (empty)

At the bottom of the form, there are 'Update' and 'Cancel' buttons.

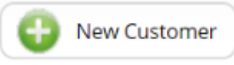
- Select the Style group from the drop-down and click "Update."
- Add all additional products you would like to include in the Style group.

THE CUSTOMERS SECTION

The  tab allows for the modification of customer records within the BackOffice. This will give you more control when it comes to the information you have at your disposal about specific customers. It is important to note that not every customer is the same, which applies to both product pricing and the services offered to each customer.

i IF AN ERP SYSTEM IS LINKED, IT IS RECOMMENDED TO MAINTAIN CUSTOMERS WITHIN THE ERP.

CUSTOMERS

In this sub-section, you can fill in various information fields and click on “Save” to add the customer to the list. Use the  button to open the Customer Details screen.

This is another way of adding customers instead of using the Customer template

ADD CUSTOMER TAB: CUSTOMER DETAILS

Accessed by creating a new customer or by clicking on the “Edit” button on an already existing customer.



The screenshot shows a web form titled "Customer Details" with a breadcrumb trail: "Customer Details | Addresses | Custom Item Pricing | Inventory | Invite To Turnys | Additional Customer Attributes | Membership". The form contains the following fields:

Company Name:	Phone:
Salutation:	Email:
Name:	Fax:
Balance:	Zone ID: None
Limit:	Is Active: Active
Company Contact:	Taxable: None
First Name:	Sales Tax Area: None
Middle Name:	Price Level: None
Last Name:	Terms: None
	Discount: None

At the bottom of the form, there is a "HINT: You must save this record before entering other's tab data." and two buttons: "Save" and "Cancel".

ADD CUSTOMER TAB: ADDRESSES

In this tab, you will be able to enter additional information such as the customer's address and shipping information. After you enter the information, you can save it by clicking the "Update" button.

The screenshot shows a software window titled "Edit Customer" with a tabbed interface. The "Addresses" tab is active. The form is organized into two columns of fields:

- Left Column (Business Address):**
 - Address Type:
 - Business Street:
 - Business Street 2:
 - Business Street 3:
 - Business City:
 - Business State:
 - Business Country:
 - Business Zip:
- Right Column (Shipping Address):**
 - Shipping Name:
 - Shipping Street:
 - Shipping Street 2:
 - Shipping Street 3:
 - Street City:
 - Shipping State:
 - Shipping Country:
 - Shipping Zip:

At the bottom center of the form area, there are two buttons: "Update" and "Cancel".

ADD CUSTOMER TAB: CUSTOM ITEM PRICING

The custom pricing option lets you override the standard prices of your products and/or services for a particular customer. By setting custom prices for a particular customer, you can save time by already knowing the prices that you agreed with that customer. This feature along with the “Filter products by customers” setting in eMobilePOS allows you to create personal product catalogs for specific customers.

To set custom prices for a customer, please follow these few simple steps:

1. Go to the Customers tab in your BackOffice.
2. Click “Edit” to the left of that Customer name on the list.
3. When the Customer Info screen appears, select the “Custom Item Pricing” tab.
4. Go through the list of products that you want to assign custom prices to that customer.
5. Check the box next to the item for custom pricing and enter the custom price.
6. Once finished adding custom pricing, click on Add Products to Customer.
7. Now, Sync the device by touching the Receive button. When you select that Customer and the items assigned to that Customer the custom prices will be shown.

Customer Details | Addresses | Custom Item Pricing | Inventory | Invite To Tupyx | Additional Customer Attributes

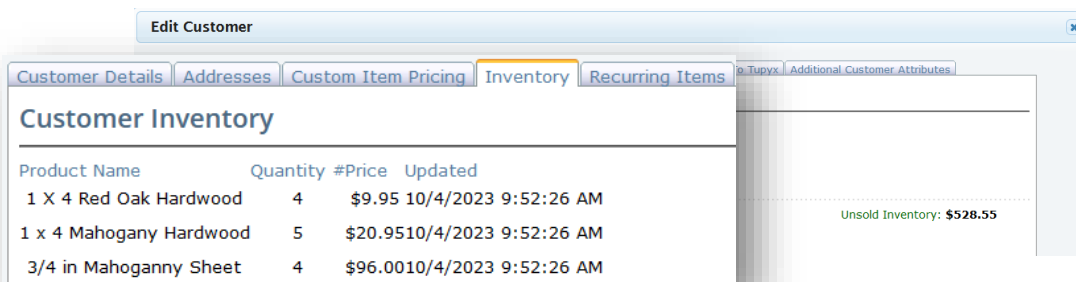
Custom Item Pricing Search

	Name	Price
<input type="checkbox"/>	Butter	<input type="text" value="0.0000"/>
<input type="checkbox"/>	Sprinkles	<input type="text" value="0.0000"/>
<input type="checkbox"/>	HOT CHOCOLATE	<input type="text" value="0.0000"/>
<input type="checkbox"/>	Paprika	<input type="text" value="0.0000"/>

1 2 3 4 5 6 7

ADD CUSTOMER TAB: INVENTORY

A customer's inventory will be populated once an associated Purchase Order or Consignment is completed. Once completed from the application end the information from the last PO or Consignment for the client will be displayed in this tab.



ADD CUSTOMER TAB: RECURRING ITEMS (REQUIRES VIRTUAL TERMINAL)

The Recurring Items tab will allow users to configure billing cycles for customers who have any kind of subscription service or need to be provided with a product on a fixed repeated time frame. Recurring items need to be configured directly from the product, a product would need to be created and Recurring Billing configured:

Configure Recurring Billing

Billing Frequency:	Billing Length:	Billing Interval:	Is Active:
<input type="text"/>	<input type="text"/>	Daily <input type="button" value="v"/>	<input type="checkbox"/>
<input type="button" value="Insert"/>			

PLEASE CONTACT EMOBILEPOS SUPPORT FOR INFORMATION AND ASSISTANCE CONFIGURING A VIRTUAL TERMINAL

What is the billing interval?

The billing interval dictates *how* the customer will be billed. Whether it will be yearly, monthly, weekly, or daily.

Billing Frequency:	Billing Length:	Billing Interval:	Active:
<input type="text"/>	<input type="text"/>	Daily ▾	<input type="checkbox"/>

Insert

What is the billing frequency?

The billing frequency will decide *how many times* within the billing interval the customer will be billed. For example, if you set the *billing interval* to “monthly” and set the billing frequency to “2” the customer will be charged biweekly.

Billing Frequency:	Billing Length:	Billing Interval:	Is Active:
<input type="text"/>	<input type="text"/>	Daily ▾	<input type="checkbox"/>

Insert

What is the billing length?

The billing length sets *how many intervals* the customer will be billed. To explain this further, if the *billing interval* is set to monthly, setting the *billing length* to “12” will bill the customer for a total of 12 months.

Billing Frequency:	Billing Length:	Billing Interval:	Is Active:
<input type="text"/>	<input type="text"/>	Daily ▾	<input type="checkbox"/>

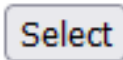
Insert

Once the Recurring Billing is configured on the product users will be able to add the product to the Recurring Billing tab within the Edit Customer screen.



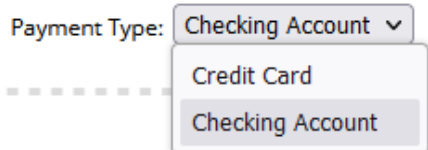
Select a Product with Recurring Billing

Find the product to be added to the customer account as Recurring Billing and click on the “Select” button.



ADD CUSTOMER TAB: PAYMENT INFO (REQUIRES VIRTUAL TERMINAL)

The Payment Info tab from the Edit Customer screen will allow BackOffice users to save payment information for customers directly in the BackOffice. Users will be able to add Credit Cards or a Checking account to the BackOffice, either of which can be selected under the Payment Type drop-down in the Payment Info tab.




Enter Checking Account Information Below:

Name on Account:

Account #:

Routing #:

Enter Credit Card Information Below:





ADD CUSTOMER TAB: INVITE TO TUPYX

This tab allows BackOffice users to send an e-mail invite for Tupyx.com to customers.

Tupyx.com is a website that offers a mobile app for businesses to extend their services to their customers' phones. Tupyx also provides businesses with real-time analytics and marketing automation tools to increase sales and customer loyalty. [You can learn more about Tupyx by visiting our website or downloading the app.](#)

Send an invitation to this customer so he or she can view and pay invoices through Tupyx.

Enter email address:

Send Invitation

This Customer is linked to the following Tupyx Users:

ADD CUSTOMER TAB: ADDITIONAL CUSTOMER ATTRIBUTES

The Additional Customer Attributes tab will give users text boxes to provide additional information that may be useful for their business type. These additional attribute values may be found in the Edit Customer screen. (Available fields in Additional Customer Attributes are based on access provided to the client)

Additional Customer Attributes

text1:

Card ID:

Get Card Number

Flight Number:

Flight Type:

License Plate:

Boxes:

Flight Airline Name:

Flight Departure Time:


Flight Destination:

Flight Info:

THE REPORTS SECTION

REPORTS

In this section users will be able to look at a variety of different reports which will provide distinct data sets to browse on demand.

Users will have the following types of reports available from within the  **REPORTS** section of the BackOffice:

- **General Reports**
- **Customer Reports**
- **Inventory**
- **Cash Close Out**
- **End of Day**
- **Employee Reports**
- **Exports**
- **X & Z Reports**
- **Advanced Reports**
- **Custom Reports**

ⓘ ACCESS TO THE REPORTING END OF THE BACKOFFICE WILL BE CONFIGURED BY THE EMOBILEPOS TEAM DURING THE CREATION OF THE CUSTOMER BACKOFFICE PLEASE CONTACT

GENERAL REPORTS

- Batch Process Report
- Discounts Report
- Errors Log Report
- Open Shift Report
- Orders with Voided Items
- Payment Transactions Report
- Tender Reconciliation by Device

CUSTOMER REPORTS

- Customer Transactions by Clerk Report
- Customer Transaction Report
- Customer Stored Value Balance Report
- Recurring Billing Declines Report
- Open Invoice Declines Report
- Customer Inventory Report

INVENTORY

- Inventory Count Report
- Inventory Sales Reports
- Product Attributes Report
- Inventory On Hand by Location
- Inventory Location Activity Log
- Inventory Received via Purchase Orders / Receiving Documents

CASH CLOSEOUT

- Cash Close Out Reports

END OF DAY

- End Of Day Report
- End Of Day Report by Location
- End Of Day Report by Location (Complete)
- End Of Day Report – NEW FORMAT

EMPLOYEE REPORTS

- Sales By Cashier
- Sales By Cashier with Payment Methods
- Employee Time Clock

EXPORTS

- Export Emails
- Export Transactions
- Export Tax-Exempt Sales

X & Z REPORTS

- Z Report
- Closed Shift Report
- 'NO SALE' Report
- Z Report – NEW FORMAT

Sales

- Sales by Product Categories
- Sales by Detailed Products
- Sales by Products Quantity
- Hourly Sales
- Daily Sales
- Sales by Grouped Locations
- Tips by Grouped Locations

Payments

- Tender Reconciliation


Employees































- Tips by Clerk
- Orders On Hold

Exceptions

- Sales Without Items
- Sales Without Payments

THE TOOLKIT (SETTINGS) SECTION

The Toolkit tab  is your main configuration center of the web-based administrative system. This is where you will find all the necessary settings to configure your BackOffice and other features of the eMobilePOS software. The Settings tab has several subsections so we will go through them one by one:

	AUTO SYNC		COMPANY LOGO		DEFAULT VALUES
	MANAGE TAXES		CUSTOM FIELDS		EMPLOYEE ZONES
	HEADER & FOOTER		MANAGE LANGUAGE		NETWORK PRINTERS
	REASONS MANAGER		PAYMENT TYPES		PAYMENT METHODS
	MERCHANT ACCOUNT		CHECK TYPES		DEVICE LICENSES
	CONFIGURE ACCOUNT TYPE		SETTINGS		KIOSK CONFIGURATION
	CUSTOMER CUSTOM FIELDS		CLASS CONFIGURATION		HOSTED CHECKOUT CONFIGURATION
	QR CODES CONFIGURATION		TUPYX PRINT SERVER		BUSINESS HOURS
	RECEIPT OPTIONS		SYNC INTERFACE CONFIG		TUPYX PRINTER NOTIFICATIONS
	TUPYX PRINTER ATTRIBUTES		INTERFACE SYNC CREDENTIALS		SYNC INTERFACE NOTIFICATION

Here you can configure the **Nexternal** interface frequency. *For **Nexternal** customers only.*

COMPANY LOGO


This subsection lets you upload your company logo for it to appear in the different transactions that will be emailed or printed to your customers and in the BackOffice. As the screenshot below states, it is recommended that the height and width of the image logo be no greater than 300 x 100 pixels.



To add a logo, follow these simple instructions:

1. Click on "Choose File".
2. Search for the logo in the window provided. The logo must be in PNG format.
3. After selecting the appropriate logo, click "Open" in the window.

After that, the logo should appear in the BackOffice. Click on "Insert" to finish.

 PROCESS WILL DISPLAY AN ERROR IF THE PICTURE IS NOT THE CORRECT SIZE OR FORMAT.



DEFAULT VALUES

This section allows configuring the administrative and manager's password at the device level. Both are needed when the application is downloaded onto the device and on some transactions that require the manager's approval. Complete all fields that apply to your business. This section also shows the default values for your Android devices, which consist of the Ord. PO, the POS Admin Password, and the Default Price Level. Setting up the POS Admin Password is vital to making administrative changes in your devices, such as overriding prices and activating other settings at the device level.

Device Defaults

Ord. PO:

POS Admin. Password:

Default Price Level: ▼

Loyalty points feature: ▼

Loyalty points type: ▼

Redeeming Points(%):

Points accumulation value(%):

Global Discount Item: ▼

Affect Main inventory onhand on Sales:

POS Manager Password:

Credit Card Return Time Limit:

Signature Required over this amount:

Reprint Time Limit:

Disable Reprint:

Max Number of Reprints:

Max Daily Reprints:

Employee Password from API:

The default value for POS Admin is: **admin**
The default value for POS Manager is: **manager**

The Default Values contain the following:

Ord. PO: Coming Soon

POS Admin Password: The Admin Password in eMobilePOS devices. (Admin Settings)

Default Price Level: The default price level that will be set for your eMobilePOS devices.

Loyalty Points Feature: Allows the user to turn On or Off the Loyalty Points Feature

Loyalty Points Type: Choose how Loyalty points will be accumulated/counted.

Redeeming Points (%): For Loyalty points program configurations, the amount in the percentage of the order for which you may use Loyalty Points for payment.

Points Accumulation Value (%): For Loyalty points program configurations, the maximum amount in percent of Loyalty Points that can be accumulated during a transaction.

Global Discount Item: Global Discount configuration.

Affect Main inventory OnHand on Sales: To deduct inventory (Qty OnHand) from the Master Item Inventory (Product section) when doing Sales/Transactions.

POS Manager Password: The Manager Password in eMobilePOS devices. (Manager Settings)

Credit Card Return Time Limit: Time Limit configuration for Credit Card returns.

Signature Required Over this Amount: This will allow for the configuration of the Signature Required function for transactions over a certain amount.

Reprint Time Limit: Set the time limit to allow reprints.

Disable Reprint: Disable transaction reprints.

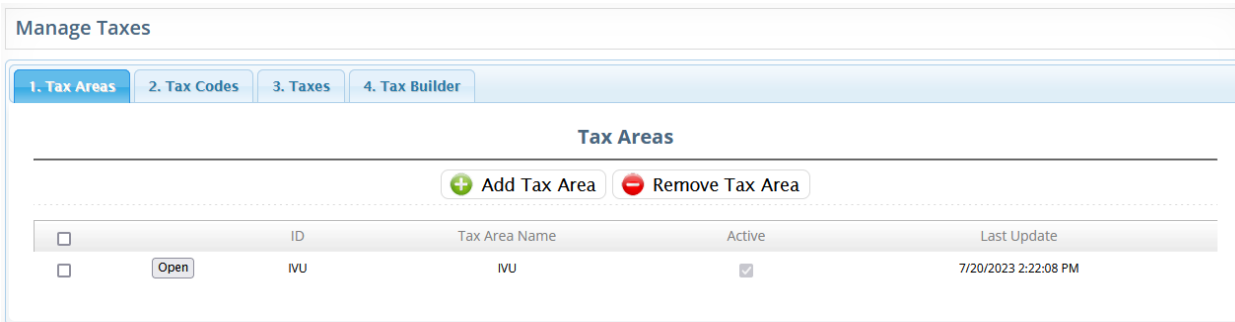
Max Number of Reprints: Configuration for the maximum number of reprints for a transaction.

Max Daily Reprints: Configuration for the maximum number of daily reprints.

Employee Password from API: Allows for the use of ERP employee passwords. When the box is checked, the API employee password from the ERP will be used in the BackOffice. When the box is not checked, the BackOffice configured password will be used for the employee (Clerk).

% MANAGE TAXES

The Manage Taxes subsection is where you can view and manage all taxes created in the BackOffice or that have been uploaded from your accounting software. They are organized by single or grouped taxes.



The screenshot shows the 'Manage Taxes' interface. At the top, there are four tabs: '1. Tax Areas', '2. Tax Codes', '3. Taxes', and '4. Tax Builder'. The '1. Tax Areas' tab is selected. Below the tabs, there is a section titled 'Tax Areas' with two buttons: '+ Add Tax Area' and '- Remove Tax Area'. Below these buttons is a table with the following columns: 'ID', 'Tax Area Name', 'Active', and 'Last Update'. The table contains one row with the following data: ID: IVU, Tax Area Name: IVU, Active: checked, Last Update: 7/20/2023 2:22:08 PM. There is also an 'Open' button next to the first row.

ID	Tax Area Name	Active	Last Update
IVU	IVU	<input checked="" type="checkbox"/>	7/20/2023 2:22:08 PM

In the **Manage Taxes** subsection you will find four tabs:

1. Tax Areas
2. Tax Codes
3. Taxes
4. Tax Builder

CUSTOM FIELDS

Custom Field Configuration

UPC Configuration

Add UPC Field

Custom Fields

+ Add Custom Field - Remove Custom Field

No Custom Fields

UPC Configuration

Select “Add UPC Field” from below UPC Configuration to add your custom UPCs and SKUs for products.

EMPLOYEE ZONES

Employee zones are the areas in which you will restrict your employees to work. This section is used to manage the zones that were either created in this section or were synchronized from the Accounting or ERP system. The zones in this section can be used to organize the customers that the employee can view on his/her Android device. Please note that if you linked an accounting or ERP system to the BackOffice manage your zones from the accounting or ERP system.

Manage Employee Zones + Add Employee Zone - Remove Employee Zone ✓ ✗

<input type="checkbox"/>	Name
<input type="checkbox"/> Open	Kitchen
<input type="checkbox"/> Open	FOH

HEADER AND FOOTER

This subsection is where you will configure the company information that will appear in the receipts, orders, estimates, and invoices. This information will appear not only in the printed documents but also in the emailed copy to the customer and your company records. Make sure you at least put the store name and the store email. This section must be configured so that the Android devices can email a copy of the receipts to the customers they sold to.

Header & Footer

Header Line 1:

Header Line 2:

Header Line 3:

Footer Line 1:

Footer Line 2:

Footer Line 3:

Store Name:

Store Email:

Include Tupyx Wallet Required Fields

This section allows you to manage the language and other localization information of your BackOffice.



The screenshot shows a 'Manage Language' interface. At the top, the title 'Manage Language' is centered. Below it, there are two rows of text: 'Language: English (United States)' and 'Language Code: en-US'. A horizontal line is positioned below the 'Language Code' row. At the bottom center, there is a rounded rectangular button labeled 'Edit'.

To change the language just click "edit" and select the appropriate language and then click "Update" when finished.

ⓘ CHANGES MADE TO THE LANGUAGE SETTINGS FROM THE MANAGE LANGUAGE SECTION OF YOUR TOOLKIT MAY AFFECT THE UNIT OF CURRENCY THE BACKOFFICE WILL USE.

NETWORK PRINTERS

This section will allow you to add network printers. This is for businesses that require more than one printer to print information from separate locations in the same establishment.

The best example of this feature would be the restaurant/bar businesses. Let us say that when a customer has their order taken, then part of the order will go to the kitchen printer and the other part of the order will print to the bar.

Here you will be able to view and add the printers for your business before you can assign them to the location.

Network Printers + Add Printer - Remove Printer						
<input type="checkbox"/>		ID	Name	IP	Port	Type
<input type="checkbox"/>	Open	84	KDS	192.168.1.34	4000	KitchenGo
<input type="checkbox"/>	Open	99	TPX 2	192.168.1.223	9100	Star
<input type="checkbox"/>	Open	100	TPX Recibo	192.168.1.177	9100	Star

Add Printer

Name:

IP:

Port:

Type:

Insert Cancel

To add a network printer, follow these simple instructions:

1. Click Add Printer.
2. Add the Name, IP, Port, and Type.
3. Click "Insert".
4. After the printer is configured, you will need to configure the Locations.

In Reasons Manager, you can view and manage the details for returns.

Reasons Manager			
+ Add Reason Activate Deactivate Activate All Deactivate All			
<input type="checkbox"/>	Name	IsActive	Date
<input type="checkbox"/> Open	Test 2 PJR	1	5/23/2022 4:37:31 PM
<input type="checkbox"/> Open	Test 1	1	11/25/2015 4:24:59 PM

Add Reason ✕

Name:

Status:

Insert Cancel

PAYMENT TYPES

This section allows users to create a relationship between BackOffice-configured Employees and Payment Methods provided by Credit Card processors and Merchant Accounts.

<input type="checkbox"/>	Card Processor	Employee Name	Card Type
<input type="checkbox"/>	Tgate Test	Windows R5	AmericanExpress
<input type="checkbox"/>	Tgate Test	Windows R5	Check21
<input type="checkbox"/>	Tgate Test	Windows R5	JCB
<input type="checkbox"/>	Tgate Test	Windows R5	DinersClub
<input type="checkbox"/>	Tgate Test	Windows R5	Discover
<input type="checkbox"/>	Tgate Test	Windows R5	Visa

To assign payment types, users will need to complete the following instructions:

Click Add Relation.



This will open the **Add Relation** window where you will be able to Assign Payment types.

Add Relation

Assign Payment Types

Registered Card Processors: 0820611012

Search by Employee Search

ID	Employees	Payment Methods
<input type="checkbox"/>	1 Windows R1	<input type="checkbox"/> AmericanExpress
<input type="checkbox"/>	2 iOS Employee 2	<input type="checkbox"/> ATHMovil
<input type="checkbox"/>	3 Android Employee 2	<input type="checkbox"/> Boloro
<input type="checkbox"/>	4 Windows R5	<input type="checkbox"/> Cash

From the left side, select the employees who will complete transactions with the payment type by filling in the checkbox(es) as required.

Search by Employee

ID	Employees
<input type="checkbox"/>	1 Windows R1
<input checked="" type="checkbox"/>	2 iOS Employee 2
<input type="checkbox"/>	3 Android Employee 2
<input checked="" type="checkbox"/>	4 Windows R5

On the right side, you will find all payment methods configured in the BackOffice, as completed previously you will select the Payment Methods that the employees will take

Payment Methods	
<input checked="" type="checkbox"/>	AmericanExpress
<input type="checkbox"/>	ATHMovil
<input checked="" type="checkbox"/>	Boloro
<input checked="" type="checkbox"/>	Cash

Make sure that from the dropdown under “Registered Card Processors” you select the correct merchant account (if multiple exist)

Registered Card Processors:

test

Click Assign when finished.

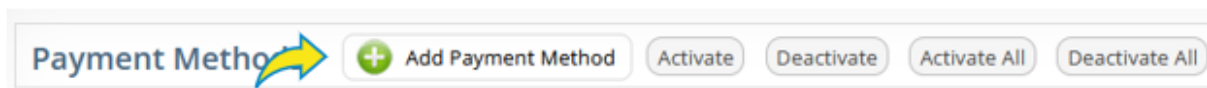


PAYMENT METHODS

This option serves as the central hub for the management of payment methods, offering the capability to review, configure, or adjust your financial transaction mechanisms. While the payment methods are inherently synchronized with your accounting software, this platform serves as the designated location for their accessibility. For those not integrating with accounting software, this designated space facilitates the initiation and configuration of payment methods.

Follow these steps to add a Payment Method:

1. Click on the “Add Payment Method” button.

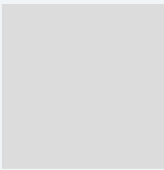


2. Name the payment method.
3. Select the Type. (Drop-down)
4. Click on the “Insert” button.

Add Payment Method [X]

Name: Type:

Logo: No file chosen

Preview: 

MERCHANT ACCOUNT

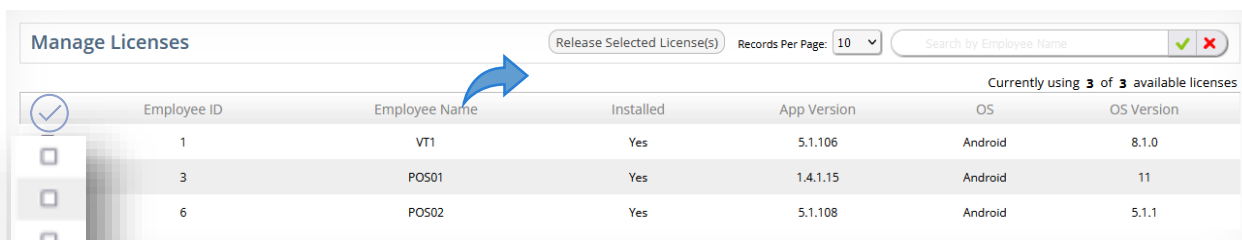
In the Merchant Account option, users can designate and fine-tune their Credit Card Processor settings, thereby enabling the acceptance of credit cards as viable payment methods. Should inquiries arise about credit card processing or your existing card processor company, we encourage you to reach out to e-Nabler Support for prompt and comprehensive assistance.

CHECK TYPES

Used for eCheck configuration. Please contact e-Nabler Support if you have any questions regarding eCheck configuration.

DEVICE LICENSES

This section functions as a comprehensive repository, displaying all currently active licenses alongside their corresponding status updates. Within this section, users gain the ability to release licenses, facilitating seamless transitions for the transfer of licenses to new devices or for reinstallation on the same device. To release a license, click on the checkbox of the desired license and click "Release Selected License(s)" located at the top.



Employee ID	Employee Name	Installed	App Version	OS	OS Version
1	VT1	Yes	5.1.106	Android	8.1.0
3	POS01	Yes	1.4.1.15	Android	11
6	POS02	Yes	5.1.108	Android	5.1.1

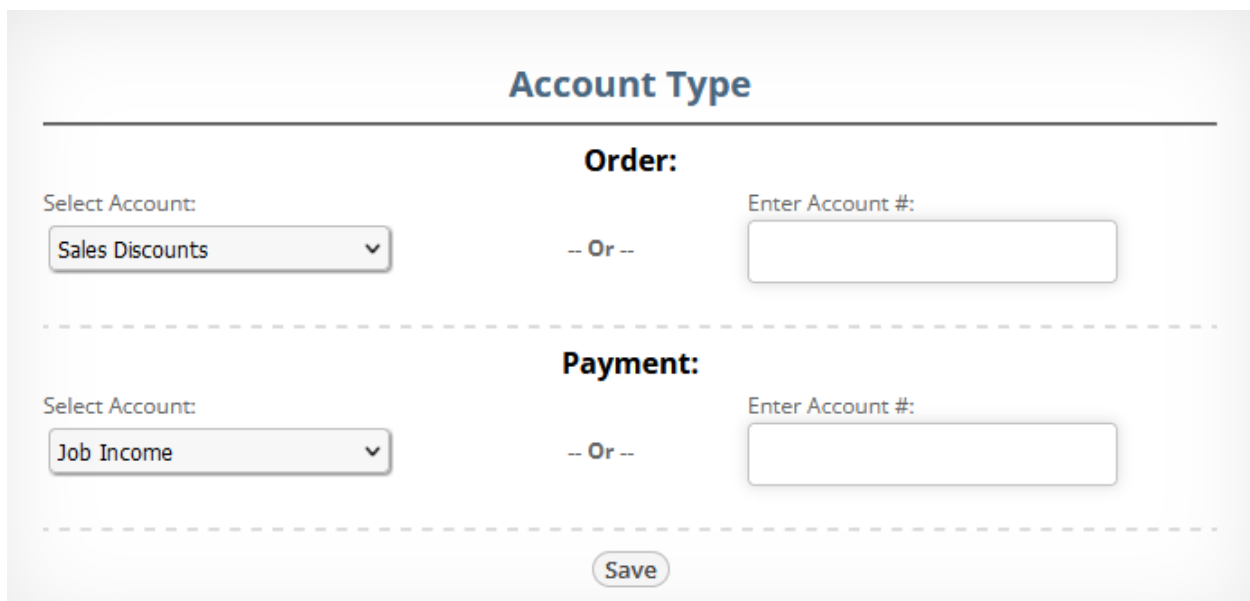
PLEASE MAKE SURE YOU ARE RELEASING THE CORRECT LICENSE. IF YOU RELEASE THE WRONG LICENSE, THE DEVICE ASSOCIATED WITH THAT LICENSE WILL STOP FUNCTIONING PROPERLY (IT WILL STOP SYNCING). IF THIS HAPPENS YOU WILL NEED TO RE-INITIALIZE THE DEVICE AND ALL UN-SYNCD TRANSACTIONS WILL BE LOST. PLEASE

CONFIGURE ACCOUNT TYPE

This section serves as the focal point for account type management, specifically tailored for integration with accounting software. If you have accounting software configured with eMobilePOS, you can seamlessly adjust the settings related to Account Receivables within this designated area. It is important to note that the transfer of data from the accounting software occurs automatically, streamlining the process and ensuring accuracy in the configuration of Account Receivables.

The screenshot below shows the Account type configuration screen that will come up when clicking the Configure Account Type icon from the toolkit in the BackOffice. Users will see both an Order and Payments section that will need to be populated with information from the accounting software company file. On the left, there will be a dropdown for Quickbooks users to select which account they would like Orders and Payments to be transferred to in their accounting software.

Alternatively, Sage users have the option to manually configure the account. To proceed, select the "Enter Account Manually" option from the drop-down list on the left and input the relevant account number in the designated field to the right.



Account Type

Order:

Select Account: -- Or -- Enter Account #:

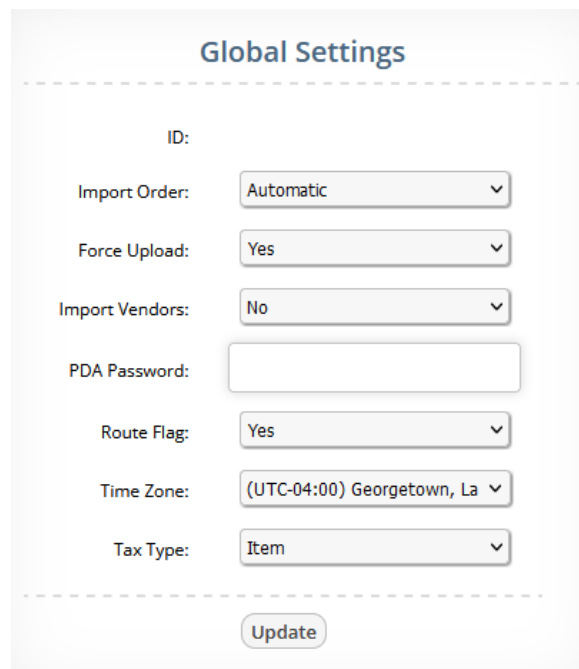
Payment:

Select Account: -- Or -- Enter Account #:

THE ACCOUNT INFORMATION REQUIRED CAN BE FOUND IN THE “CHART OF ACCOUNTS” IN YOUR SAGE ACCOUNTING SOFTWARE.

SETTINGS

This section facilitates the configuration of essential parameters, including the time zone and PDA password, which are necessary to begin the initialization of the eMobilePOS application on your Android device.



Global Settings

ID:

Import Order: Automatic

Force Upload: Yes

Import Vendors: No

PDA Password:

Route Flag: Yes

Time Zone: (UTC-04:00) Georgetown, La

Tax Type: Item

Update

On user accounts the ID section will display the account number for the customer and the PDA Password will show the specific account password to configure devices with eMobilePOS.

The settings encompassing Import Order, Force Upload, Import Vendors, and Route Flag primarily pertain to the seamless interaction between the BackOffice, accounting software (QuickBooks), and the accounting software interface (QuickBooks WebConnector). While the Import Order and Import Vendors settings are self-explanatory, the remaining two settings, named Force Upload and Route Flag, are dedicated to BackOffice configuration.

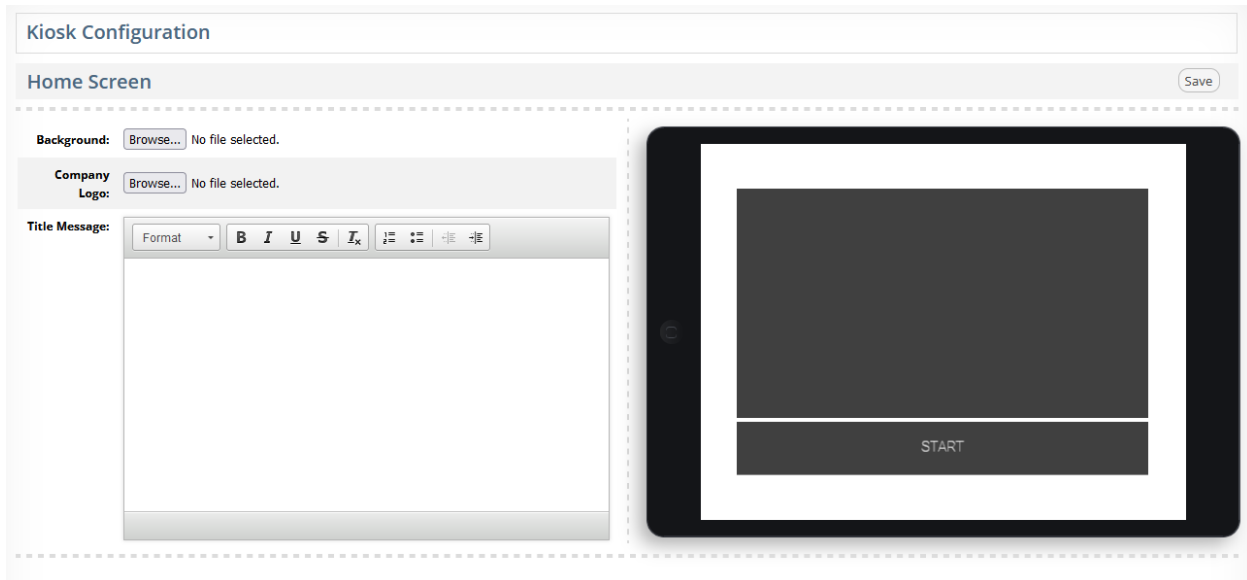
By default, the Force Upload setting is preset to YES, ensuring comprehensive data uploading to the BackOffice. Once the data uploading process is complete, the setting automatically transitions to NO, subsequently facilitating the download/upload of new data exchanges between Android devices and the accounting software.

The Route Flag setting is specifically designed for businesses employing distinct customer lists for individual employees. When utilizing this feature in your accounting software, maintaining the setting as YES is recommended. Alternatively, set it to NO to grant access to all customers in the absence of such a specific configuration.

The Tax Type setting presents two options: Customer and Item. Customer-based taxes apply uniformly to the entire customer ticket, whereas Item-Based taxes offer flexibility for assigning different tax rates to diverse products.

KIOSK CONFIGURATION

Facilitates the customization of key visual elements, including the Background Image, Company Logo, and Homepage Instructions, in addition to configuring the messaging for the eMobileKiosk version. (Exclusive to iPad).



CUSTOMER CUSTOM FIELDS

This feature empowers users to tailor and enhance the customer information management system by configuring custom fields. Offering a degree of flexibility, this functionality allows for the creation and customization of fields beyond standard data categories. By leveraging Customer Custom Fields, businesses can capture and organize unique customer-specific data points, ensuring a more comprehensive and personalized customer profile. This not only facilitates a more nuanced understanding of individual customer needs but also enables organizations to adapt their customer relationship management strategies with precision.

CLASS CONFIGURATION

Class Configuration  

The class configuration will allow Quickbooks users to configure transaction classifications to be identified within the BackOffice.

HOSTED CHECKOUT CONFIGURATION

This section is useful for managing the setup of hosted checkout experiences in the payment gateway. It allows you to precisely set the callback URL, which is essential for smooth communication between the payment gateway and the merchant's system.

Hosted Checkout Configuration

Specify a callback page where hosted checkout will POST its response to.

Call Back URL:

The callback URL serves as a specific link where transaction details are sent back to the merchant's server after payment approval. With Hosted Checkout Configuration, you can carefully define and handle this callback URL, ensuring the accurate and secure transfer of transaction data. This control not only enhances the reliability of transaction processes but also strengthens the overall security of the payment system. As a result, you can provide a more secure and dependable checkout experience for your customers.



QR CODES CONFIGURATION

This section facilitates the generation and assignment of QR codes tailored for specific customers who engage in recurrent purchases using predefined templates. To craft a customer-specific QR code, adhere to the following procedural guidelines:

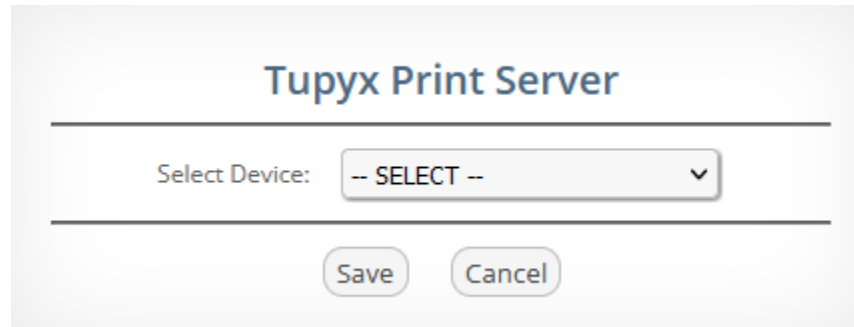
1. Navigate to the designated screen and initiate the process by selecting “New QR Code”
2. Define the parameters for the customer during the subsequent steps:
 - In Action, select “Order”.
 - In Customer, select the corresponding customer for the QR Code.
 - In Location, select “None”.
 - In Application Type, select “eMobilePOS”.
 - The “Load Template” box must be checked.
 - Finally, click the “Save” button. (Note: If the insert/cancel buttons are not present, please press CTRL+F5 to refresh the page).
3. The generated QR Code for the respective customer will be visible at the end of the page.
4. Synchronize (Receive) your eMobilePOS app device to implement the configured changes.
5. On the mobile device, identify and select the recently created QR code-associated customer.
6. Proceed to initiate a Sales Receipt transaction.
7. Populate the transaction by adding relevant products to the ticket.
8. After product addition, access the “Template” feature located at the bottom of the Product Catalog screen. This template will seamlessly integrate with the QR code. Consequently, each instance of QR code scanning from the Home Menu screen (Sales Tab) will yield a Sales Receipt populated with customer details and selected products, streamlining the checkout process.

PRINT QR CODES

Upon successful creation of the QR Code within the BackOffice, mark the corresponding checkbox and subsequently opt for the “Print Selected” button situated at the top of the page.

TUPYX PRINTER SERVER

This section allows you to assign an existing eMobilePOS register to download the orders taken from the Tupyx Wallet user. This is also where the station printers can be set up.



The screenshot shows a web interface titled "Tupyx Print Server". Below the title is a horizontal line. Underneath the line is the text "Select Device:" followed by a dropdown menu with the text "-- SELECT --" and a downward arrow. Below the dropdown menu is another horizontal line. At the bottom of the interface are two buttons: "Save" and "Cancel".

From this section, you will be able to configure devices and printers previously configured to the BackOffice. Please refer to the Devices section of this document for more information on setting up devices in BackOffice.

BUSINESS HOURS

FOR TUPYX STORE ONLY.

Business Hour Intervals + Save Config. - Remove Config.

Appointments

Use Intervals Calendar Days: Interval: Slots: Restriction:

Delivery

Use Intervals Calendar Days: Interval: Slots: Restriction:

PickUp

Use Intervals Calendar Days: Interval: Slots: Restriction:

This section will allow you to effectively oversee and administer your business hours. You will be able to configure availability for appointments, deliveries, and pick-ups by adding the number of calendar days, and an interval between these days of availability. You can additionally configure the number of slots available for each.

Business Hours + Add New - Delete Selected

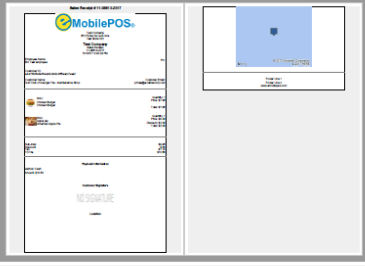
Exceptions + Add New - Delete Selected

The *Business Hours* and *Exceptions* sections will allow users to configure business hours for days of the week and addition of exceptions for holidays.

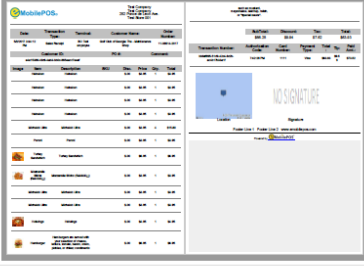
RECEIPT OPTIONS

Choose your receipt format
This will be the order/sale confirmation email that will be sent to your customers

Narrow
Accommodates necessary sale information in a mobile-friendly format.



Wide
Original receipt created with multiple detailed items in mind



Save

From this screen, users will be able to modify the digital receipts that are created and sent via e-mail from the BackOffice. The Narrow version is a more mobile-friendly version of the receipts, and the Wide version is the original version which contains multiple additional details. Click on the type of receipt you would like to use and click “Save” to keep your preference.

SYNC INTERFACE CONFIG

Sync Configuration
Select a source from which to sync the Categories information

Back Office External Source

Send new customers to ERP?
 Yes No

Use default Discount?

Save

Attribute Configuration
Link Attributes between ERP and Back Office

ERP Product Attribute: -- SELECT ATTRIBUTE -- eMobilePOS Attribute: -- SELECT ATTRIBUTE --

Save Attribute Link

This section provides users with the capability to designate a source for the synchronization of the Categories information. Users can exercise the option to select a specific origin or repository from which the Categories data will be synchronized. This feature facilitates control over the data synchronization process, enabling users to tailor the integration to their specific preferences and requirements.

From this screen, users will be able to determine where information for the categories that are populated to the BackOffice.

- *Select a source from which to sync the Categories information*
Using this configuration users can choose whether the categories displayed in the BackOffice will come from an External Source (ERP) or from the BackOffice itself.
- *Send New Customers to ERP*
This setting will determine if New Customers that are created will be sent to the ERP software
- *Attribute Configuration*
Allows the user to create a Link between attributes that are differently named in the BackOffice and ERP



TUPYX PRINTER NOTIFICATIONS

ⓘ FOR TUPYX STORE ONLY.

This section has the functionality to dispatch SMS notifications about maintenance events and sales transactions within the Tupyx system. These notifications are directed towards pre-configured phone numbers. This system provides a proactive means of communication, ensuring that stakeholders are promptly informed of any maintenance requirements for the printer and updates on the sales activities within the Tupyx platform.

Tupyx Printer Notification

Message Language

English Spanish

Email Recipient

Email Address:

SMS Recipients

Contact Telephone 1:

Contact Telephone 2:


Contact Telephone 3:

Contact Telephone 4:

Contact Telephone 5:

Save Cancel

TUPYX PRODUCT ATTRIBUTES

 FOR TUPYX STORE ONLY.

This section allows you to set up Tupyx product attributes (such as color, size, flavor, etc.) to create transactions.

Tupyx Add Balance Configuration

Transaction Type

Invoice Sales Receipt

Product to Add Balance

Select Product:

Attribute

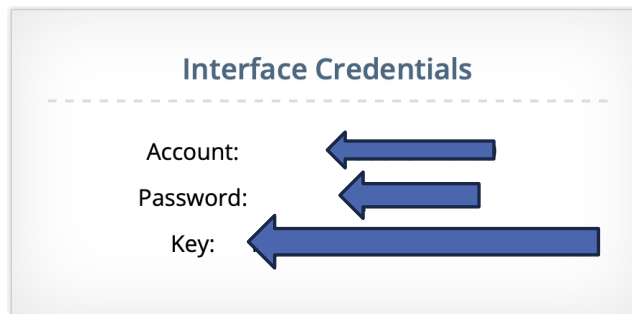
Attribute:

Require Customer

Require Customer on Sale

INTERFACE SYNC CREDENTIALS

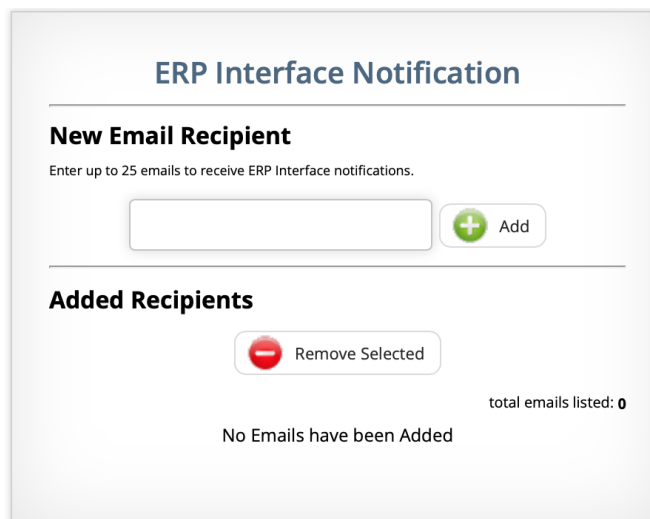
From this screen, users will be able to find the information required to configure the eMobilePOS Interface. The eMobilePOS interface will be required to transfer data from the BackOffice to the customer's specific accounting software. Please keep in mind that different accounting software will require specific Interface apps which can be provided by the e-Nabler support team. If you have any questions regarding this, please reach out to the support team for more information.



The screenshot shows a form titled "Interface Credentials" with a dashed line separator. Below the title, there are three input fields: "Account:", "Password:", and "Key:". Each field is followed by a blue arrow pointing to the left, indicating that the information is required for configuration.

SYNC INTERFACE NOTIFICATION

From this screen, users will be able to enter up to twenty-five email addresses to receive notifications regarding the ERP Interface.



The screenshot shows a form titled "ERP Interface Notification". Under the title, there is a section "New Email Recipient" with the instruction "Enter up to 25 emails to receive ERP Interface notifications." Below this is an input field for an email address and a green "Add" button with a plus sign. Below the input field is a section "Added Recipients" with a red "Remove Selected" button with a minus sign. At the bottom right, it says "total emails listed: 0" and "No Emails have been Added".

