POS User Manual

This manual is targeted to users of the Aidacare POS system.

For general enquiries, contact **gpsupport@aidacare.com.au**

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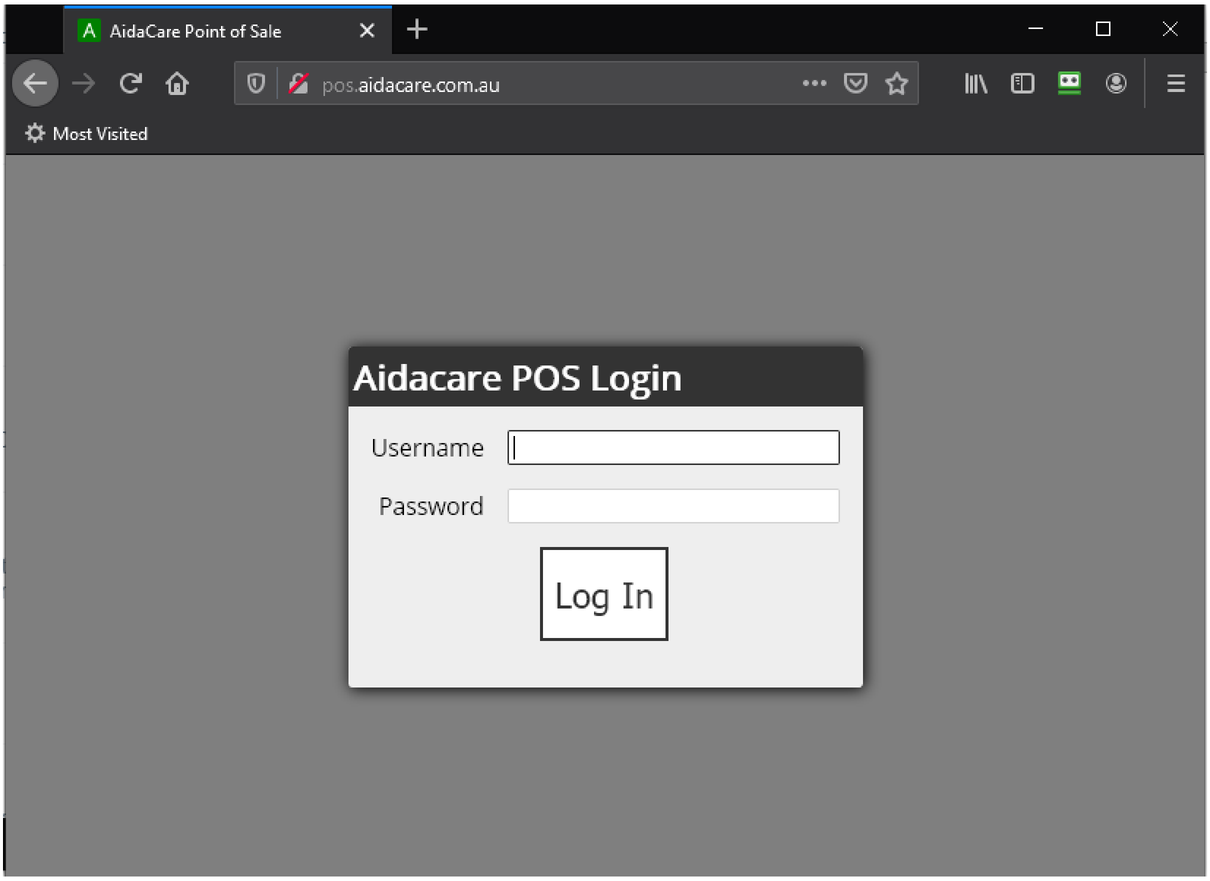
Website and Log In

1. Go to Google Chrome and enter
http://pos.aidacare.com.au

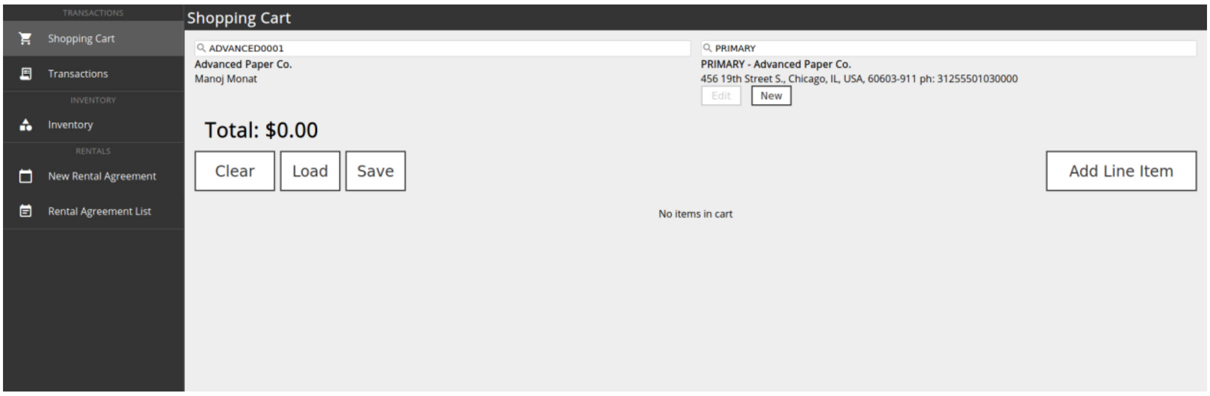
2. The below screen will appear
Enter the Username and Password given to you for your site's log in.



Basic Guide

Creating an Invoice

Firstly, navigate to the Shopping Cart page.

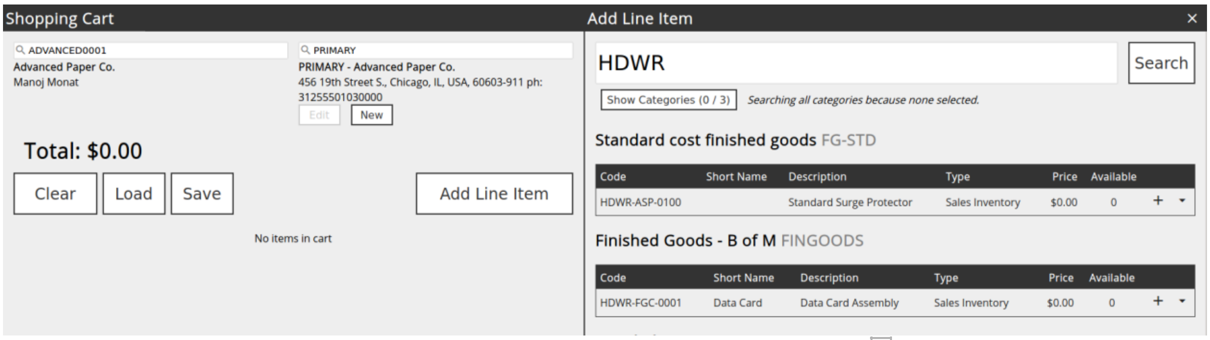


Adding a Line

You can add items to the cart in any of three ways:

1. Scan an item with the barcode scanner.

2. Click **Add Line Item** to open an *Inventory Search* in the right pane.

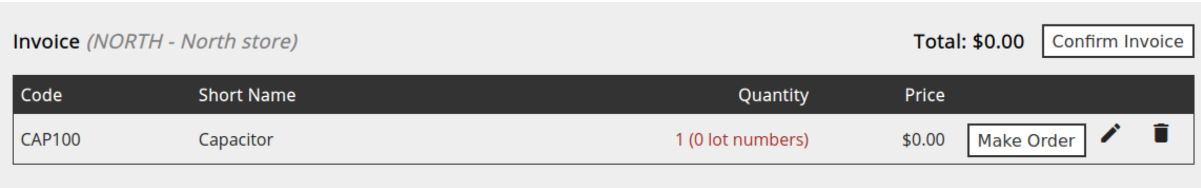


3. If you know the exact code of the item, you can also press ****, and input directly, pressing **Enter** or **Esc** to confirm or cancel.

Modifying a Line

After the line is added it will show up below the *Invoice* header.

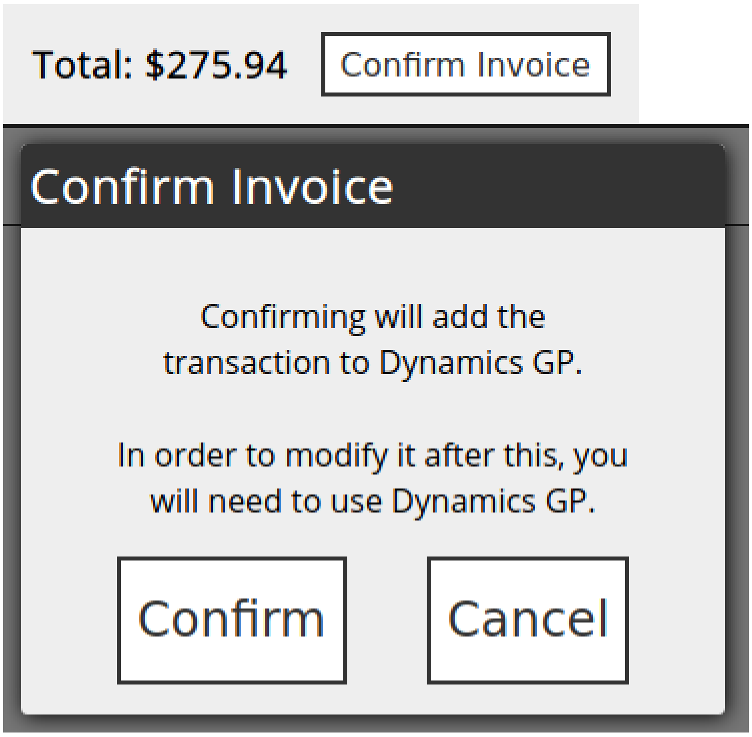
If the item requires tracking numbers (serial numbers or lot numbers), it will show that it is missing.



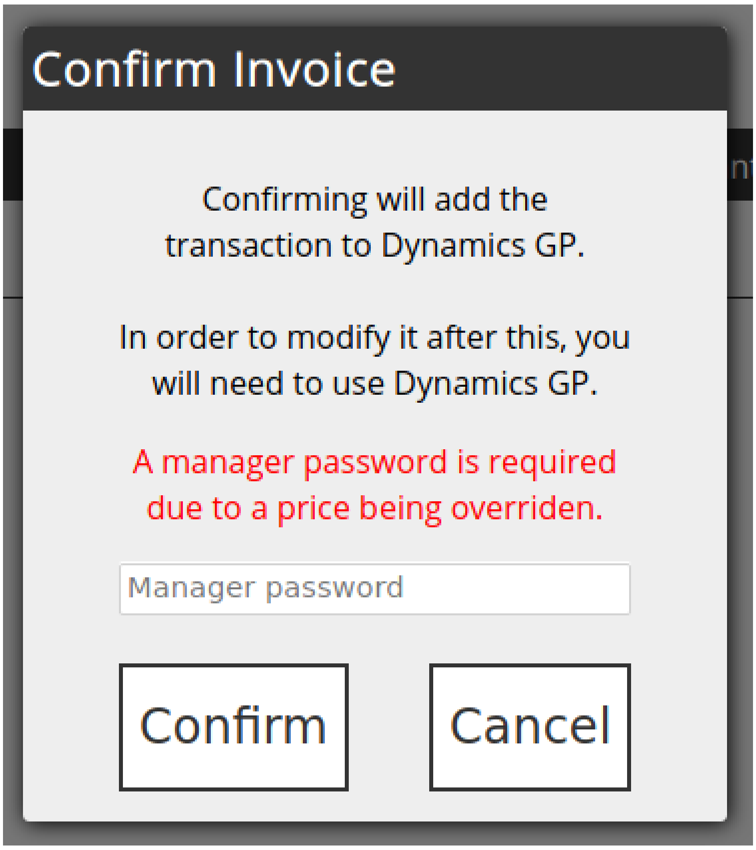
To update details about the lineItem, click the edit ( ) button. This will open the *Line Item Details* in the right pane.
Here you can update the quantity and price, add tracking numbers and transfer stock.

Confirming the Invoice

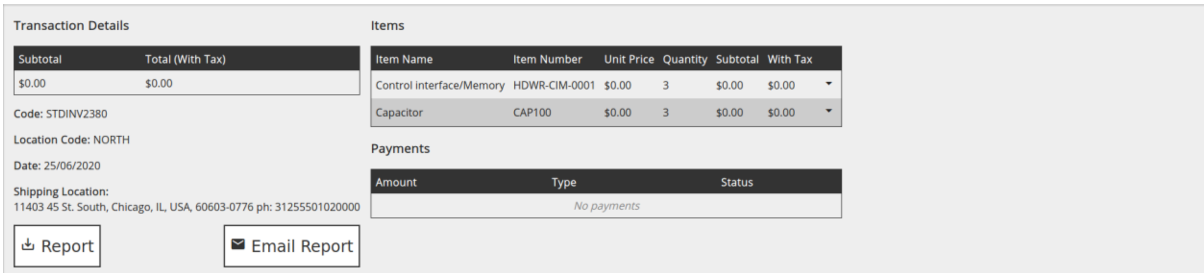
To confirm the invoice, click the **Confirm Invoice** button.



If any markdowns were applied, manager permission may be required.



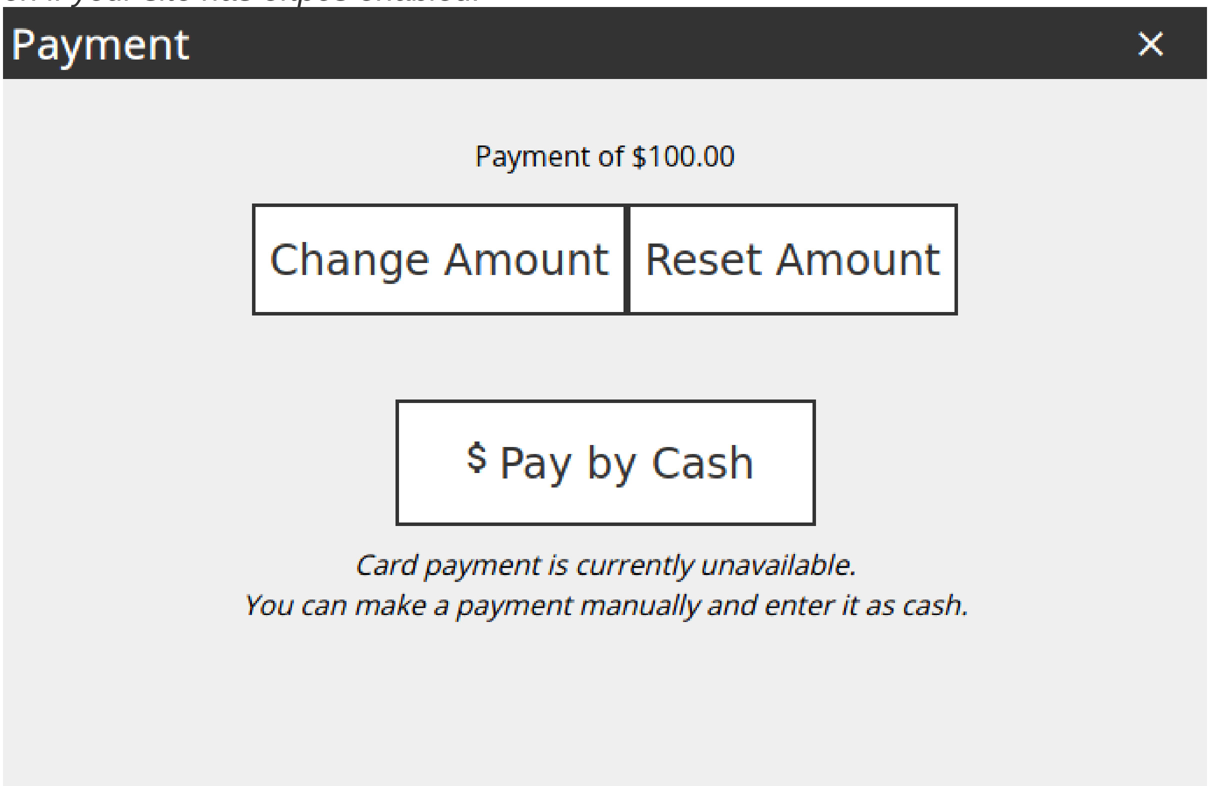
After confirming the invoice, the *Invoice Details* will show where the line items were previously.

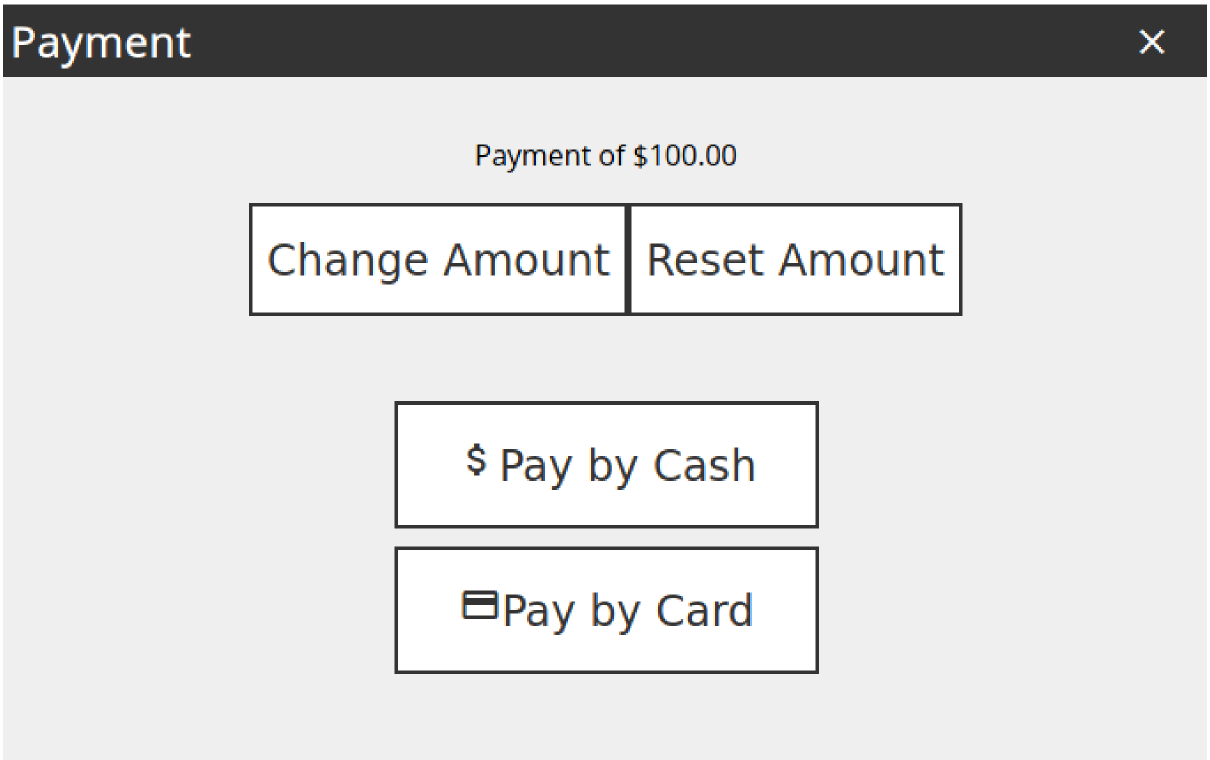


Adding Payments

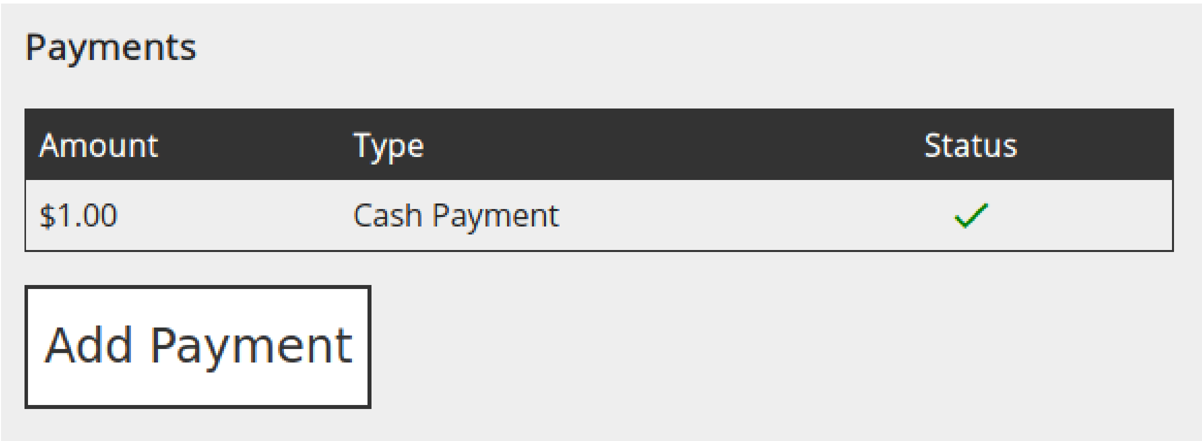
To add a payment, click the **Add Payment** button in the transaction details section.

After clicking, the payment pane will open. *This section will look different depending on if your site has eftpos enabled.*





After adding a payment, it should show against the transaction with a tick if successfully inserted into GP.



Paying with cash (or with eftpos disabled)

This section applies to paying by cash, and also to manually inserting payments that were made manually using a terminal.
Click the pay cash button and insert he amount of cash the customer has given.

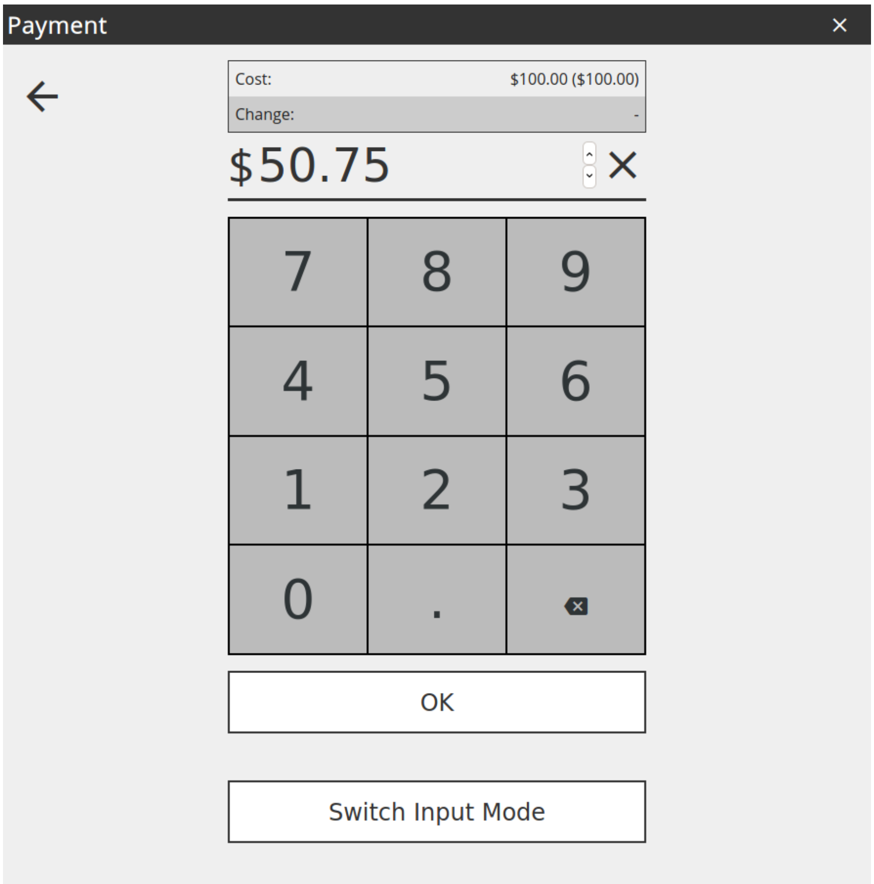
The POS will automatically calculate change against the remaining price of the item, and insert only up to the remaining price as a payment

Cost:	\$50.00 (\$50.00)
Change:	\$20.00

In the above image, the cost is in the format `Actual Cost (Cost rounded to 5 cents)`, for example, a cost of *\$50.02* would be rounded to *\$50.00* for a cash payment.

Cost:	\$50.02 (\$50.00)

If you enter a payment amount that is less than the remaining amount, a payment of the input amount will be made.



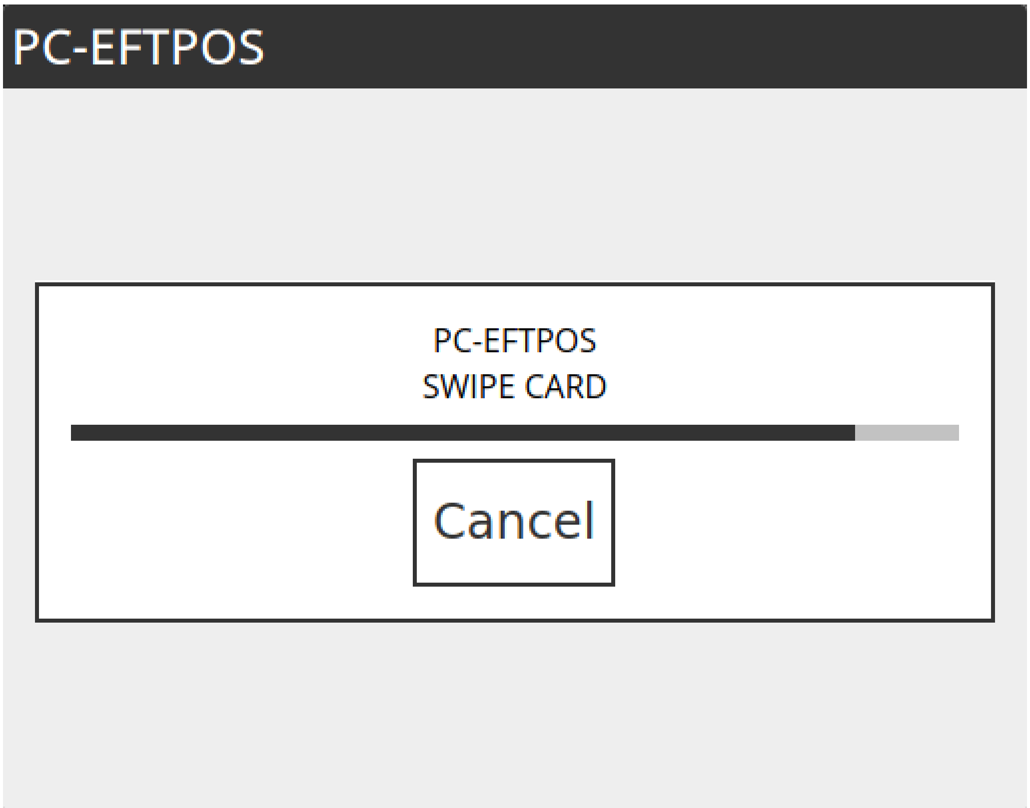
Paying with card

To pay with a card, click the **Pay By Card** button on the payment page.

Note: This button will not be present until eftpos has been enabled. You can still input manual eftpos payments as cash payments.

A PC-EFTPOS modal should pop up and automatically ask the terminal to receive a payment.

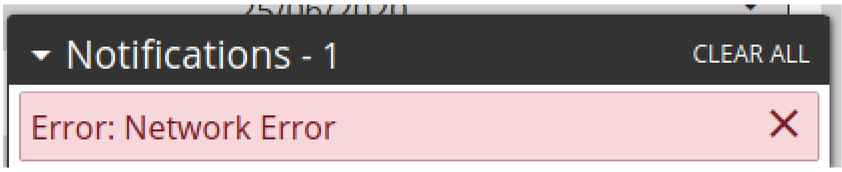
The modal should show the same text as the terminal itself.



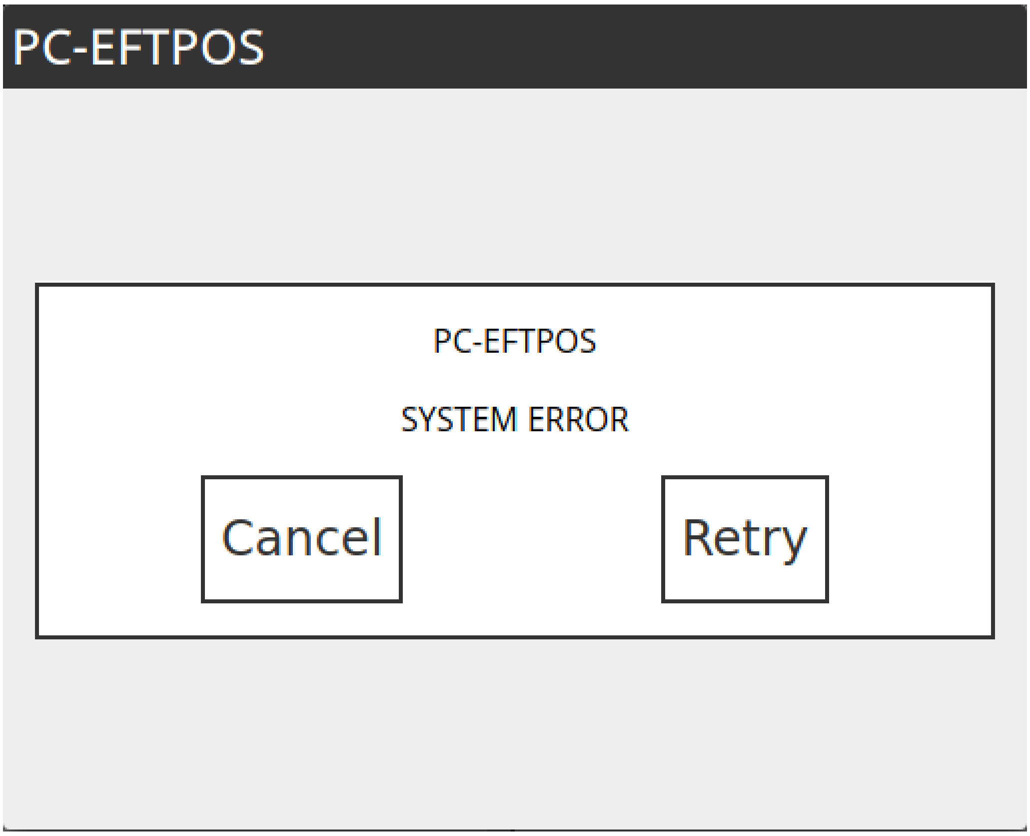
Dealing with issues

If the terminal does not complete payment, such as being cancelled, the status will be shown and a payment will not be made.

If there is an issue, you may see an error message in the notifications section.

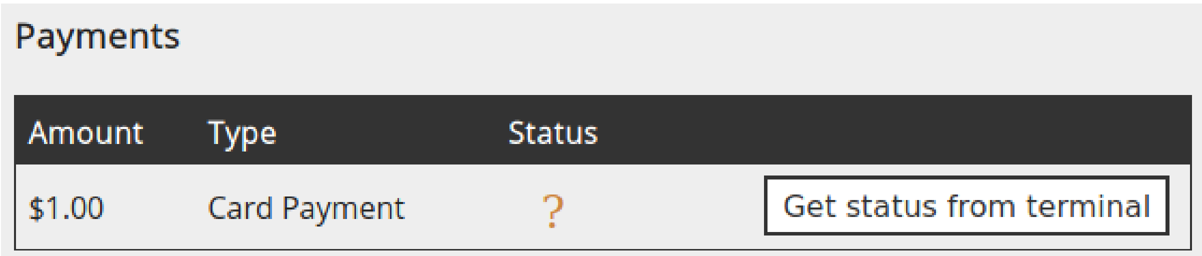


aidacare HEALTHCARE EQUIPMENT

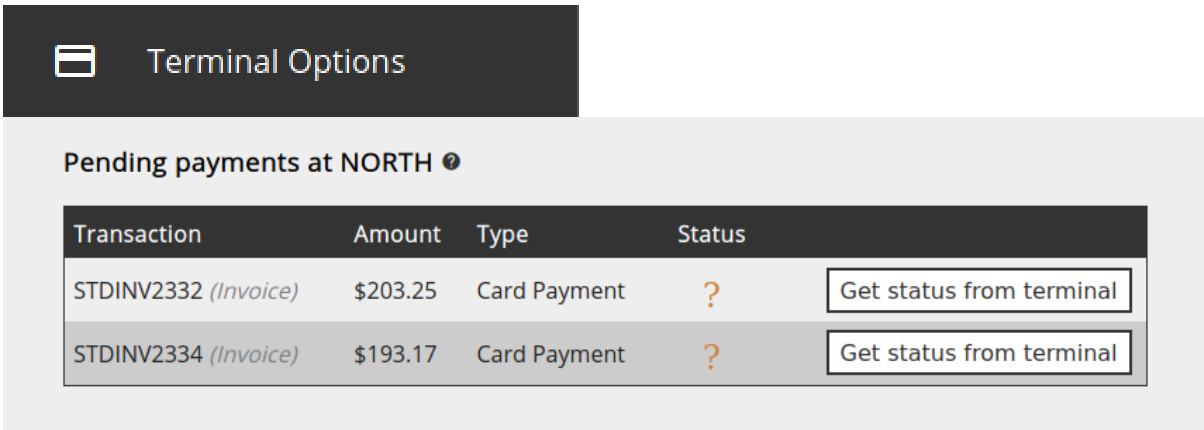


If the POS is unsure of the status of a payment, it will mark it as unknown.

It is possible to recover information by pressing **Get status from terminal**, to retrieve the result of the payment from the terminal.



It is also possible to see all payment issues by navigating to **Terminal Options** in the navbar.



If a payment was successful, but not able to be inserted into GP (e.g. if the transaction was being modified by another user) it will show with a red symbol.

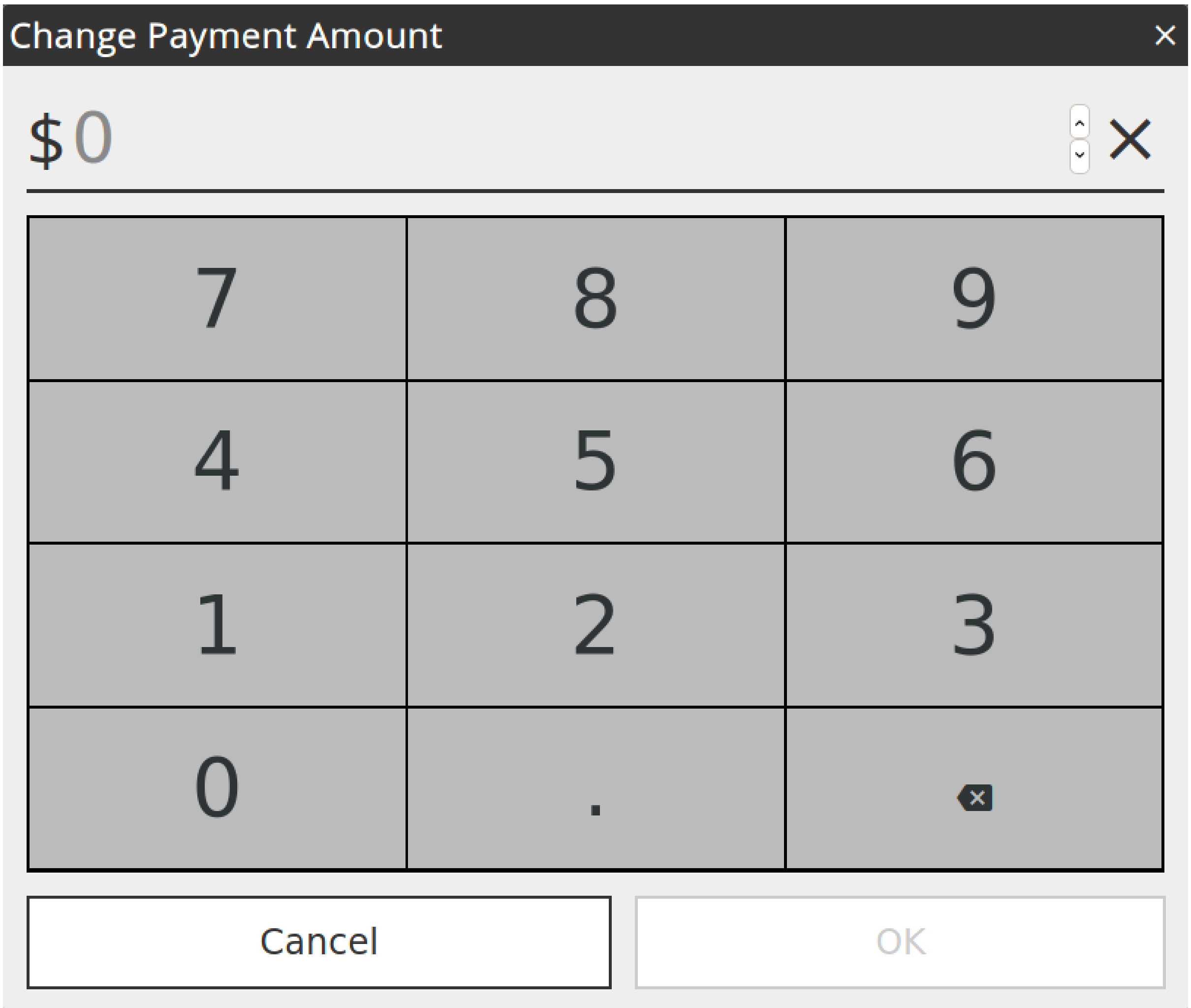
You can re-attempt to insert the payment by clicking **Put status into GP**.

Paying a smaller amount (split payments or deposits)

If you would like to make a payment that is not the full remaining amount, you can click the **Change Amount** button on the payment screen.

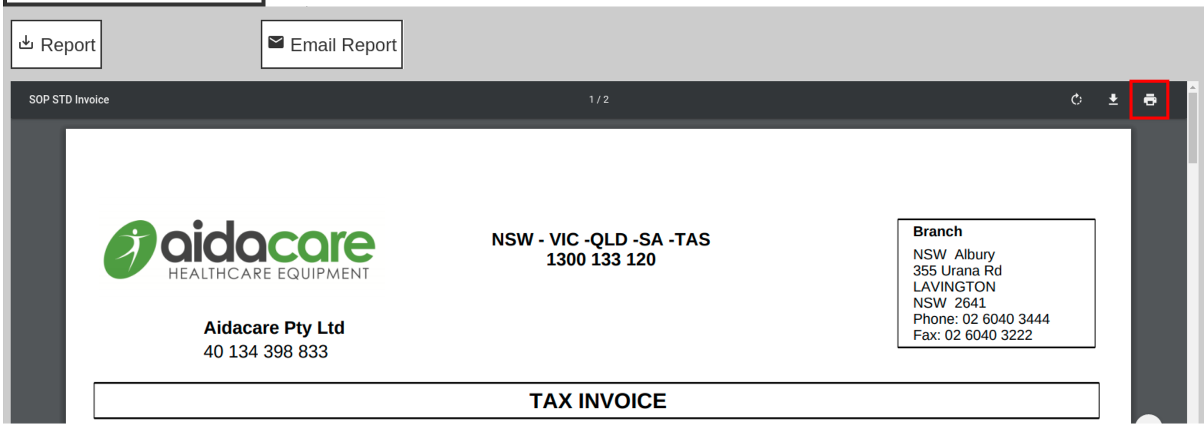
For cash payments, the POS will then calculate change to that amount and only insert a payment up to that amount.

For card payments, the POS will attempt a payment of the specified amount.



Printing the Invoice

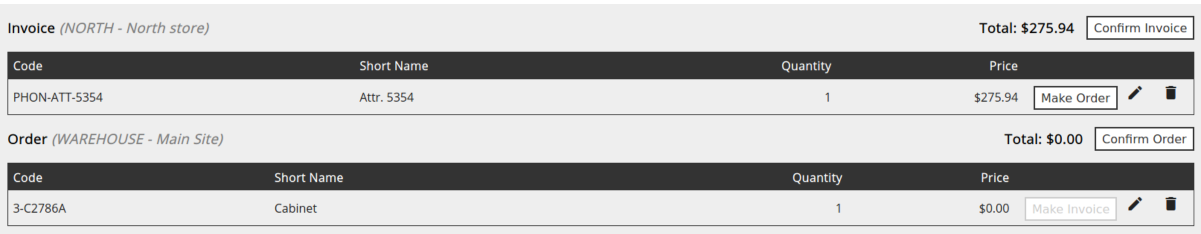
To print the invoice, click the **Report** button to generate the report, then click the print option in the pdf viewer.



Creating an Order

Creating an order is useful when a customer would like an item but it is not in stock.

By default, an item cannot be placed on an invoice if it is out of stock, and will automatically be placed on an order document.

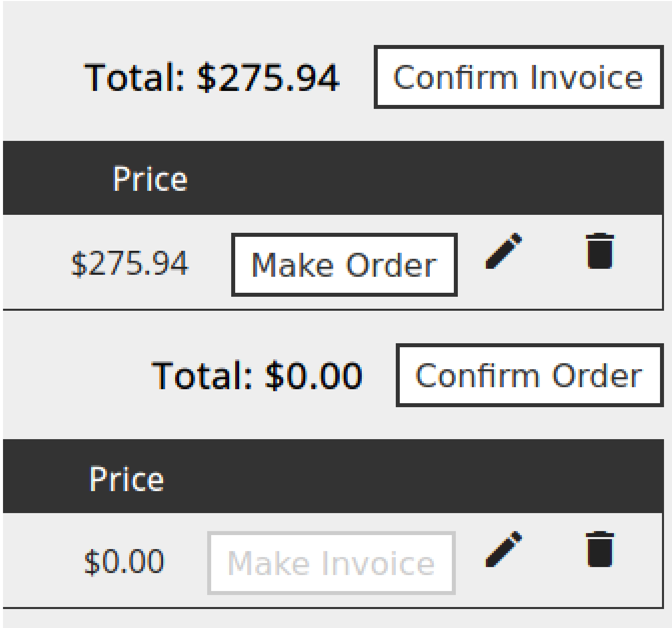


Moving Line Items Between Document Types

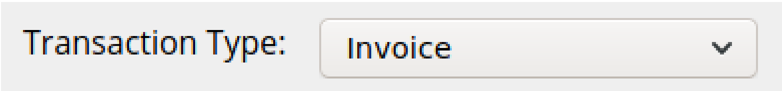
To move an invoiced item onto an order, click the **Make Order** button.

To move an order item onto an invoice, click the **Make Invoice** button.

If you have already confirmed an invoice, you will not be able to move lines to invoice or make new invoice lines. The same applies for confirming an order.

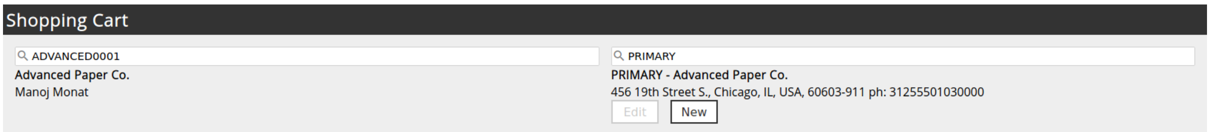


This change can also be made in the *Line Item Details* pane.



Adding Customer Information

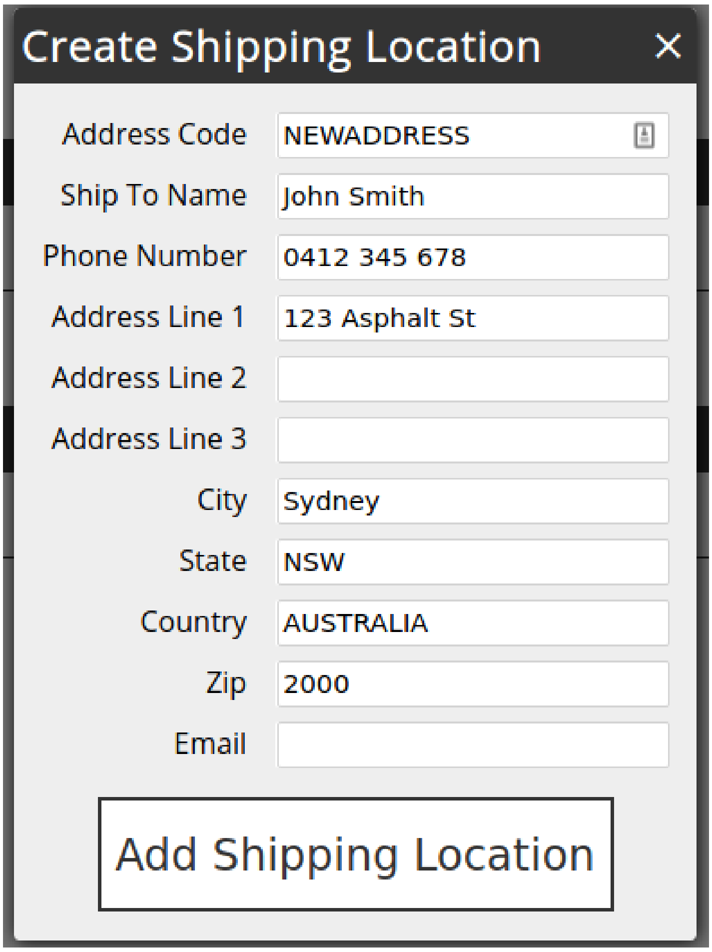
Generally when making an order you will want to update the customer / location information. This can be done through the section at the top of the shopping cart.



The left section is to change GP Customers, and the right is to change addresses. When creating invoices and order, by default they will be applied to the showroom customer and location.

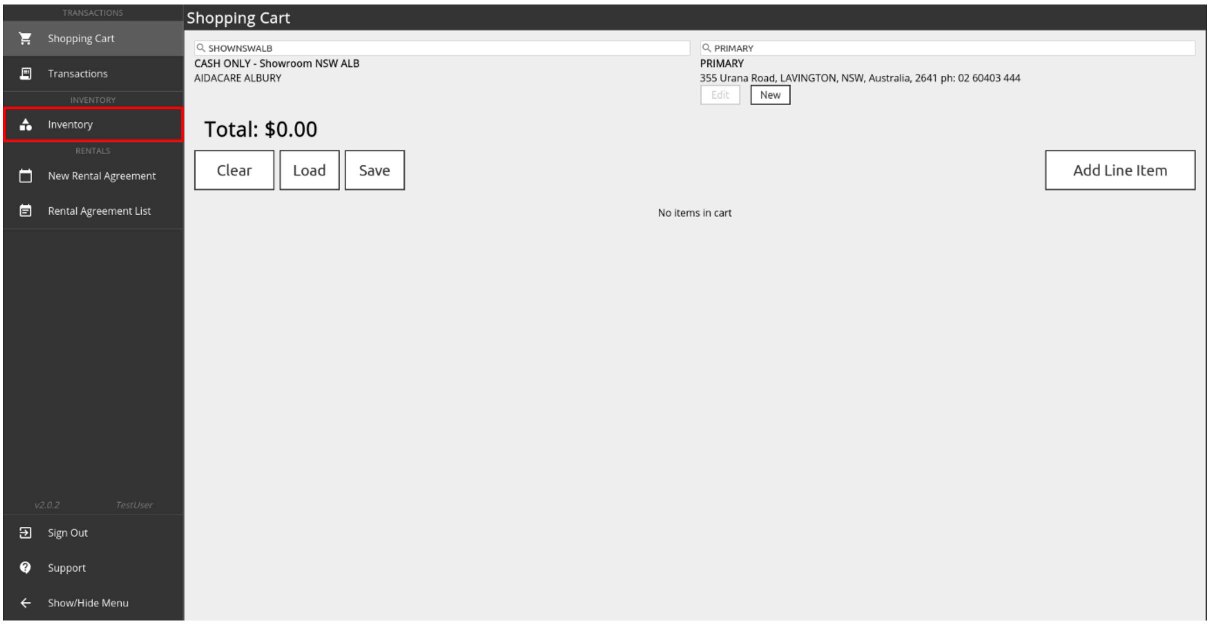
To add new customers, it is recommended to create a new shipping location against the showroom customer, by clicking **New** and filling in the details.

To search for an existing customer or location, use the customer or location search bars and search by customer number or address code respectively.

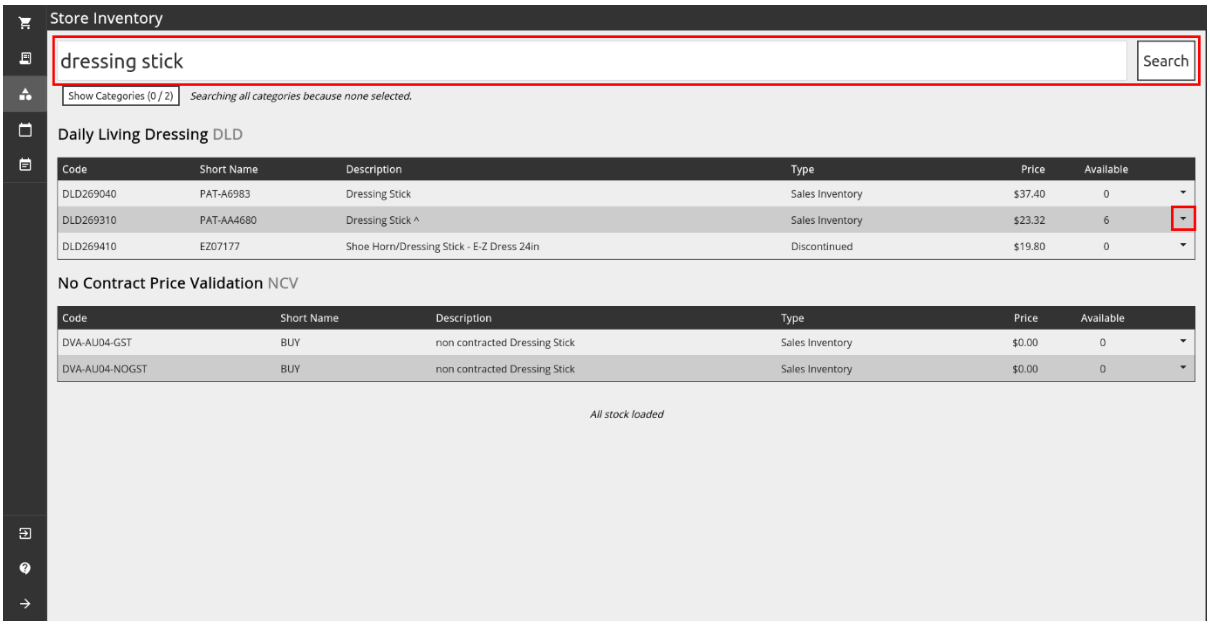


Creating a Stock Transfer

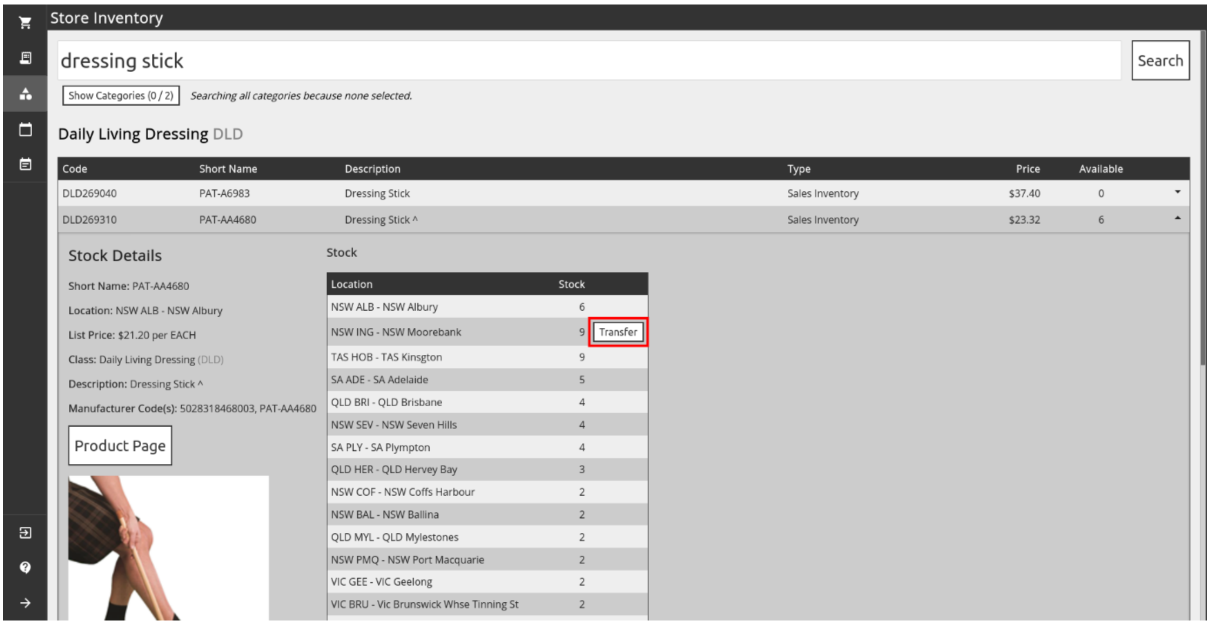
1. Navigate to the *Inventory Search* page by clicking the **Inventory** button.



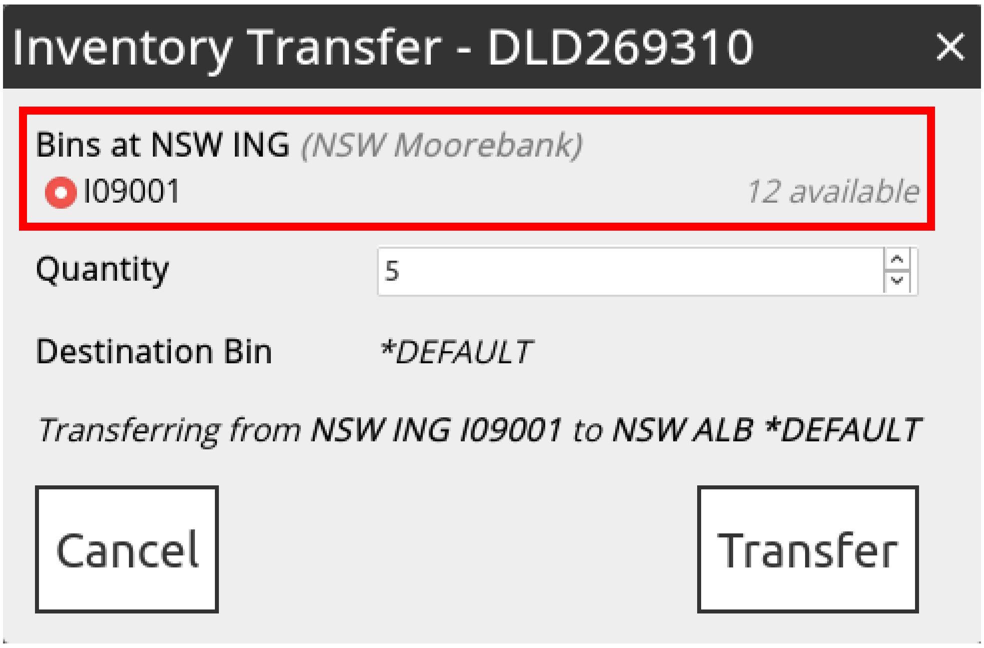
2. Search for the item you wish to transfer, then click the arrow to show more details.



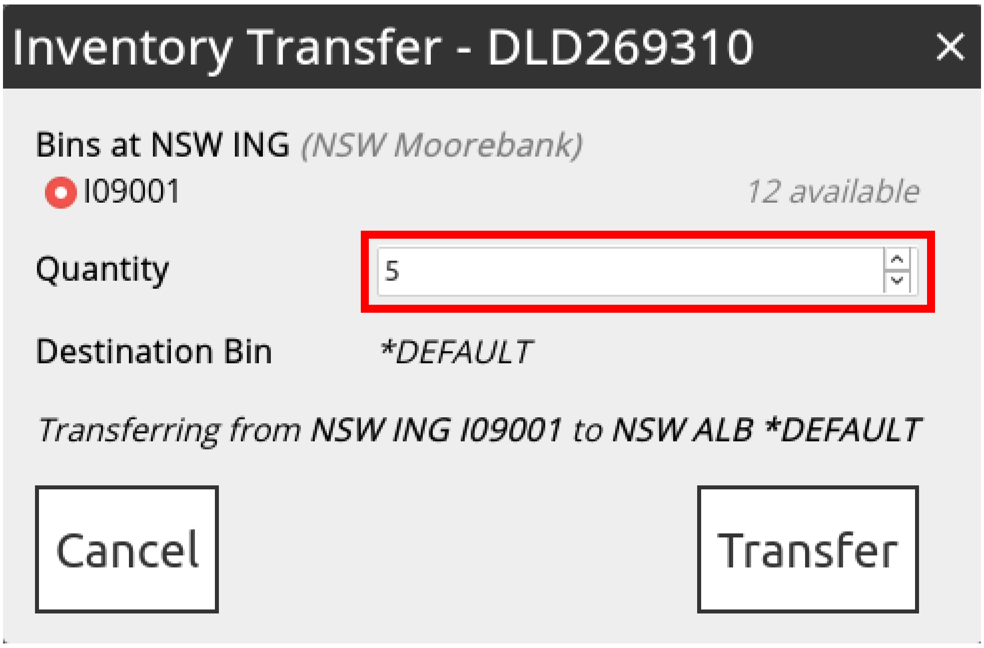
3. Click the **Transfer** button. Note that you can only transfer stock from certain warehouses.



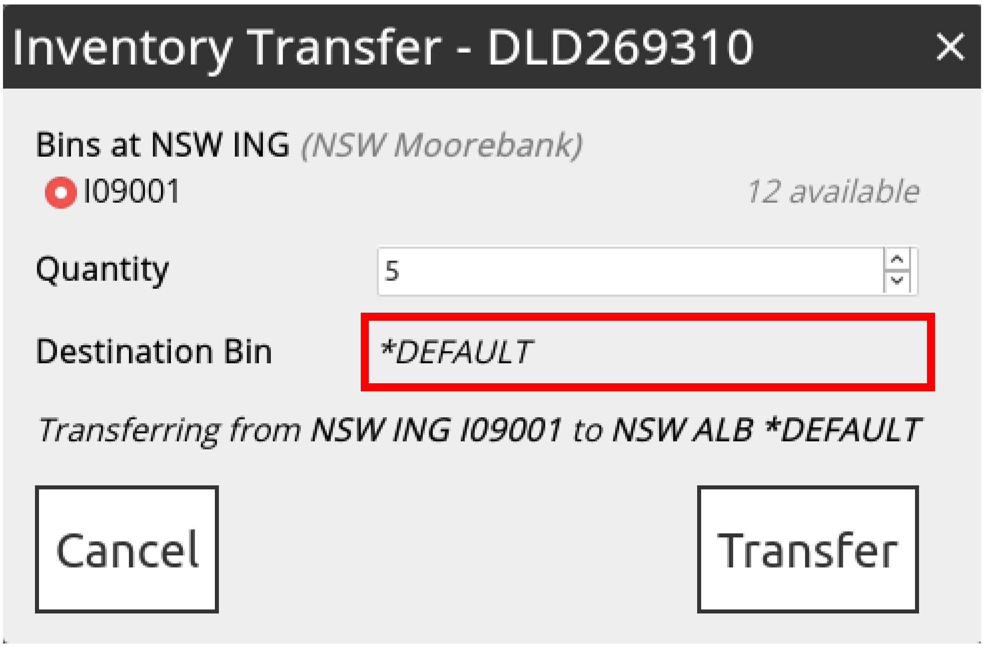
4. Select the source bin, if applicable.



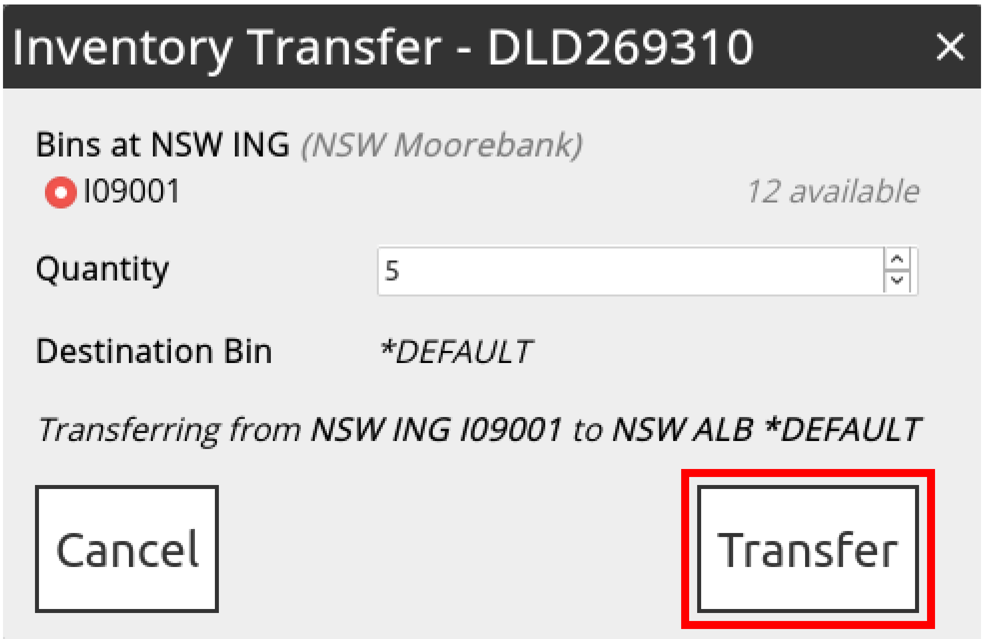
5. Input the desired quantity to transfer.



6. Select the destination bin, if applicable. Typically, there won't be an choice.



7. Click the confirm button to confirm the transfer.

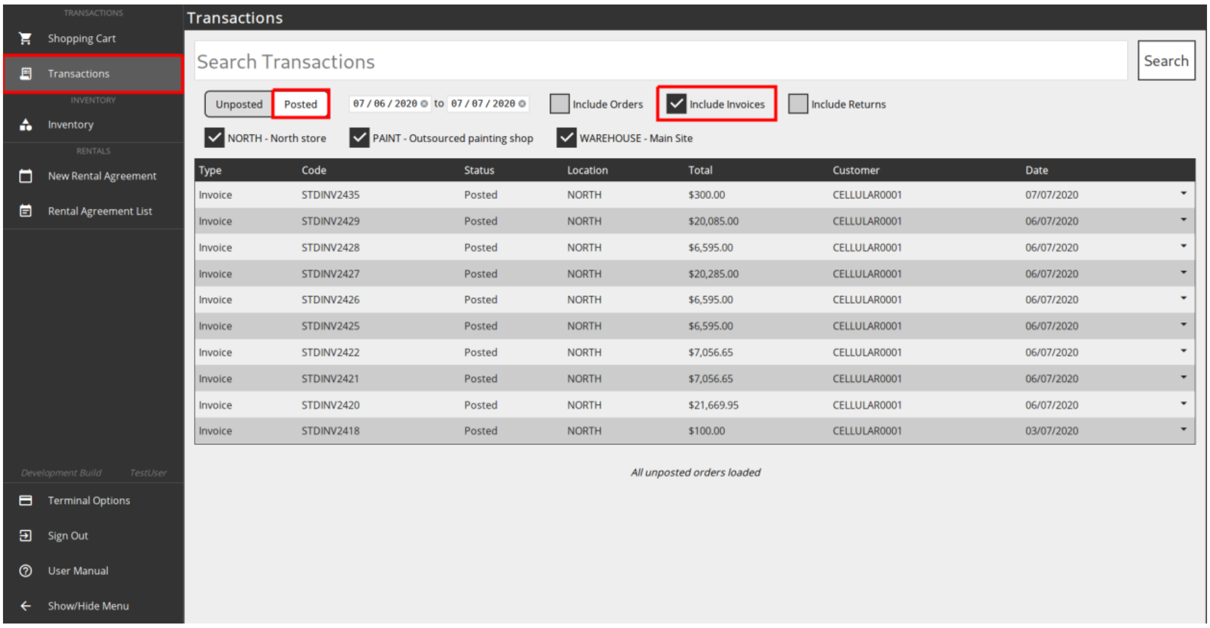


Creating a Return

Returns can only be created on posted invoices.

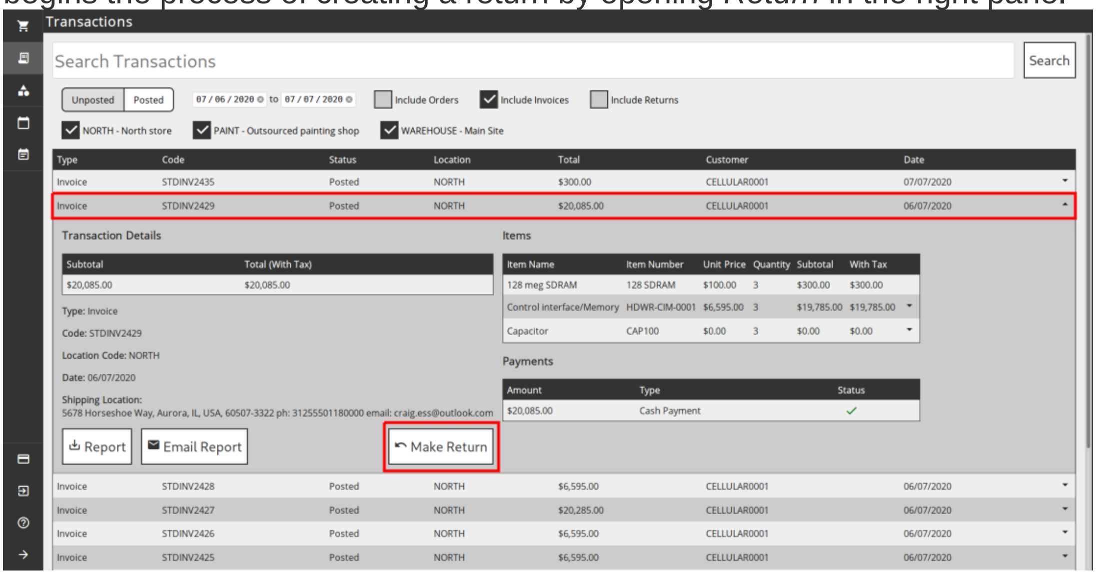
To begin creating a return, navigate to the transactions page and set the search parameters for posted transactions.

You may also find it useful to set the search parameters to only display invoices, or to search for the transaction you wish to create a return on by entering its SOPNUMBE (its "Code" in the sales transaction table) in the search field and pressing **Enter** or clicking the **Search** button.



Next click on the posted invoice that you wish to create the return on (in the list of transactions) to expand it.

Once it has loaded, the **Make Return** button will become accessible. Selecting this begins the process of creating a return by opening *Return* in the right pane.



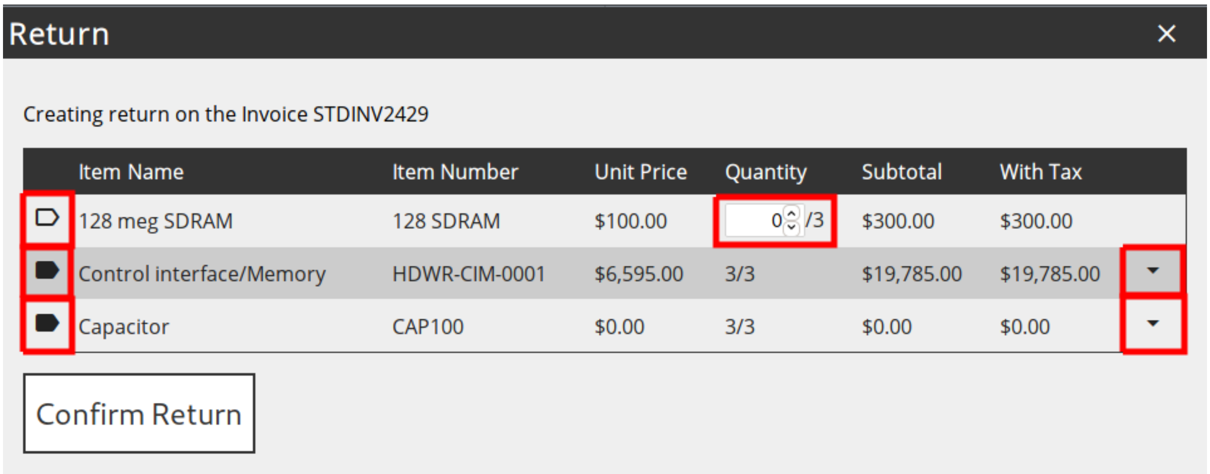
Selecting What is Being Returned

Once *Return* has been opened in the right pane you will be presented with an interface for selecting which parts of which line items on the original transaction are being returned.

On untracked line items (line items that do not use serial numbers or lot numbers) you may directly input the quantity that is being returned.

For tracked line items (line items that use either serial numbers or lot numbers) you may only adjust the quantity by adjusting the included serial numbers or lot numbers (and, for lot numbers, their included quantities). To do so, click the row of the tracked line item to expand it.

Regardless of the tracking method of the line item, the tag icon on the left hand side of it's row will indicate whether or not there are any items from that line being included in the return. If the tag is just an outline then no part of the corresponding line item is currently selected to be returned, otherwise if it is filled in then at least part of the corresponding line item is currently selected to be returned.



Selecting Serial Numbers to Return

When a serial-tracked line item is expanded, you will be able to select the serial numbers to include in the return by clicking on the corresponding check-boxes. The included quantity on the line item will automatically update.

Item Name	Item Number	Unit Price	Quantity	Subtotal	With Tax
128 meg SDRAM	128 SDRAM	$100.00	3 /3	$300.00	$300.00
Control interface/Memory	HDWR-CIM-0001	$6,595.00	2/3	$19,785.00	$19,785.00

	Serial Numbers
☑	7
☐	18
☑	16

Item Name	Item Number	Unit Price	Quantity	Subtotal	With Tax
Capacitor	CAP100	$0.00	3/3	$0.00	$0.00

Selecting Lot Numbers to Return

When a lot-tracked line item is expanded you will be able to adjust the included quantity for each lot number on the original line item. The included quantity on the line item will automatically update.

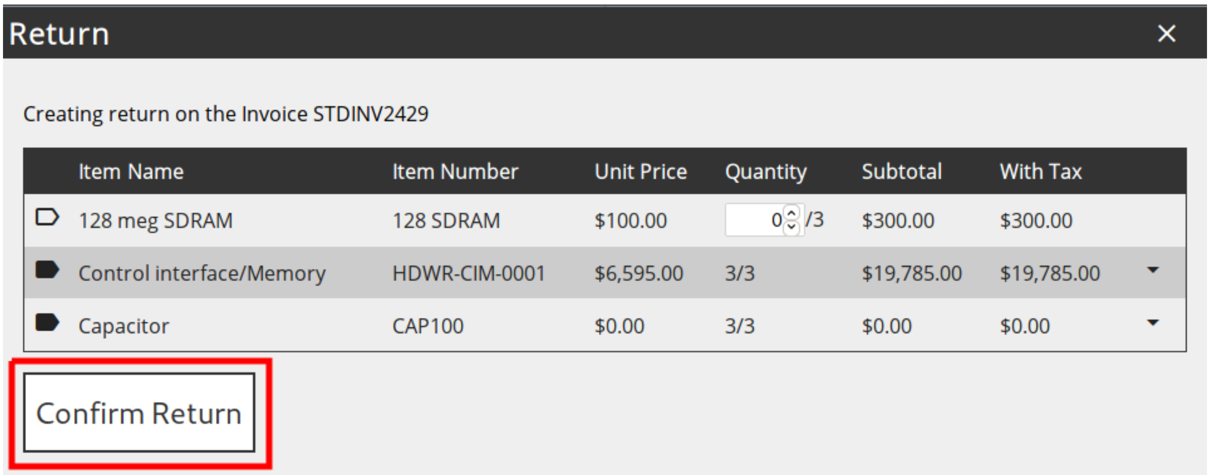
As with the whole line items, the tag icon on the left hand side of the lot number row will indicate whether or not there are any items from that lot number currently selected to be returned. Similarly to the line item tags there, the tag being just an outline indicates that no items using that lot on this line item are selected to be returned, and being filled in means that at least some items using that lot on this line item are selected to be returned.

Item Name	Item Number	Unit Price	Quantity	Subtotal	With Tax
128 meg SDRAM	128 SDRAM	$100.00	3 /3	$300.00	$300.00
Control interface/Memory	HDWR-CIM-0001	$6,595.00	3/3	$19,785.00	$19,785.00
Capacitor	CAP100	$0.00	1/3	$0.00	$0.00

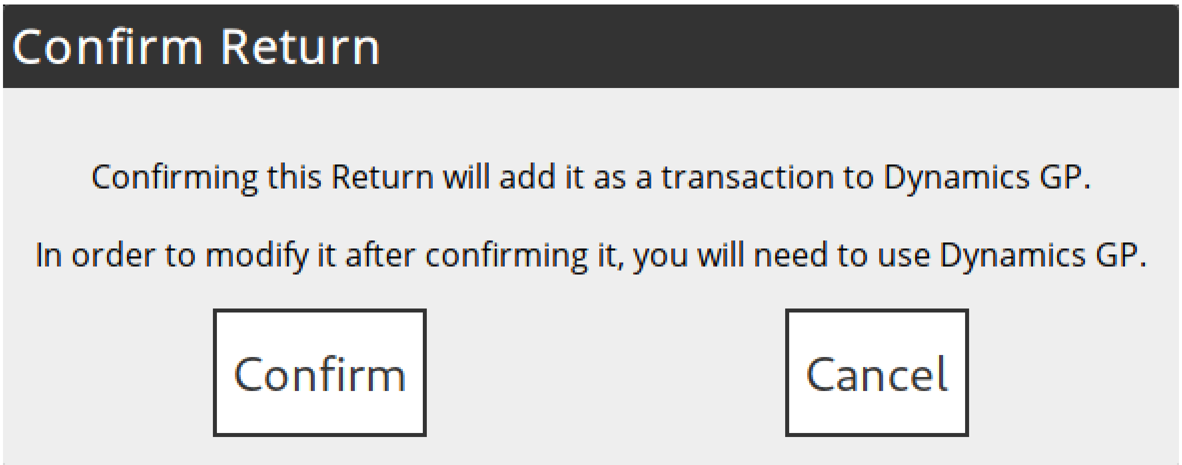
Lot Numbers	
LOT A:	1 /2
LOT B:	0 /1

Confirming a Return

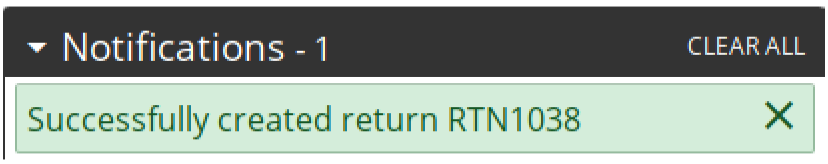
To confirm a return after you have selected which parts of which line items you would like it to include, click the **Confirm Return** button at the bottom of the *Return* right pane. It will be disabled if you have input any invalid quantities, or currently have no parts of any line items selected.



After clicking the **Confirm Return** button you will be presented with a modal to check that you are definitely ready to confirm the return. If you are ready, click the **Confirm Return** button on this modal, and click the **Cancel** button on this modal if you are not ready.



Once the return has been submitted you will receive a notification informing you that it has been successfully created, along with the SOPNUMBE (its "Code" in the sales transaction table) of the newly created return, which can be used to find it using the search on the *Transactions* page. This may be useful if you wish to create a payment on the return.

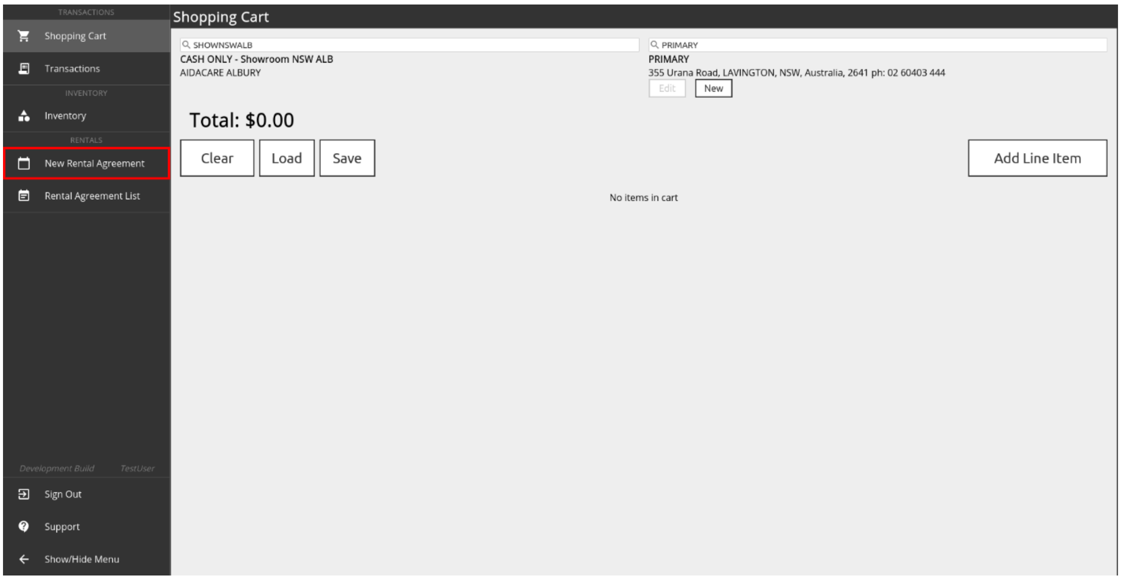


Adding Payments to a Return

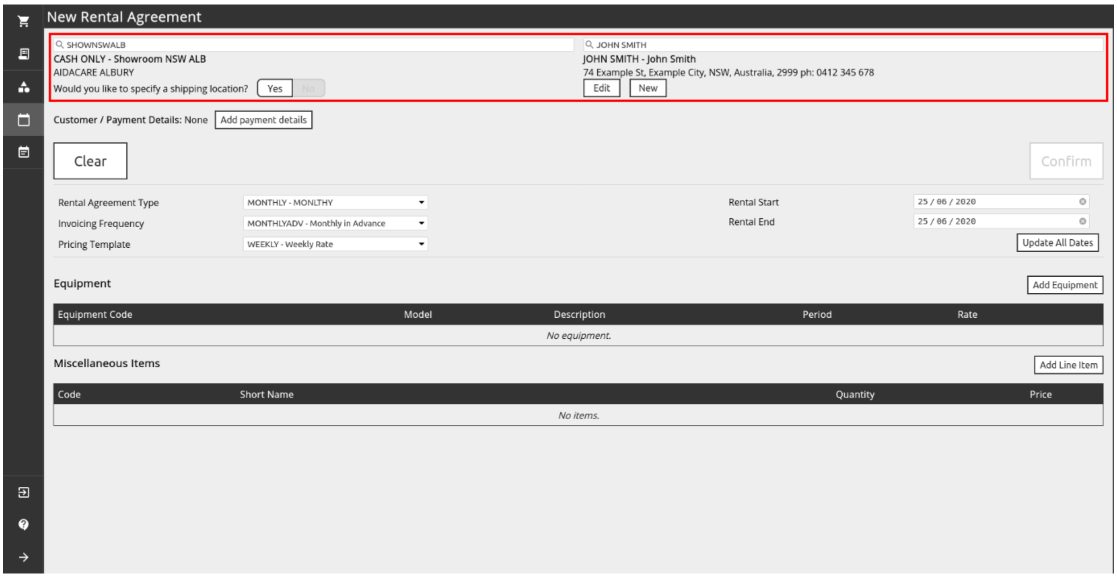
Adding payments to a return indicates refunding money to a customer. You add these refunds in the same way you add payments to a normal transaction. See this section for how to add a payment.

Creating a Rental Agreement

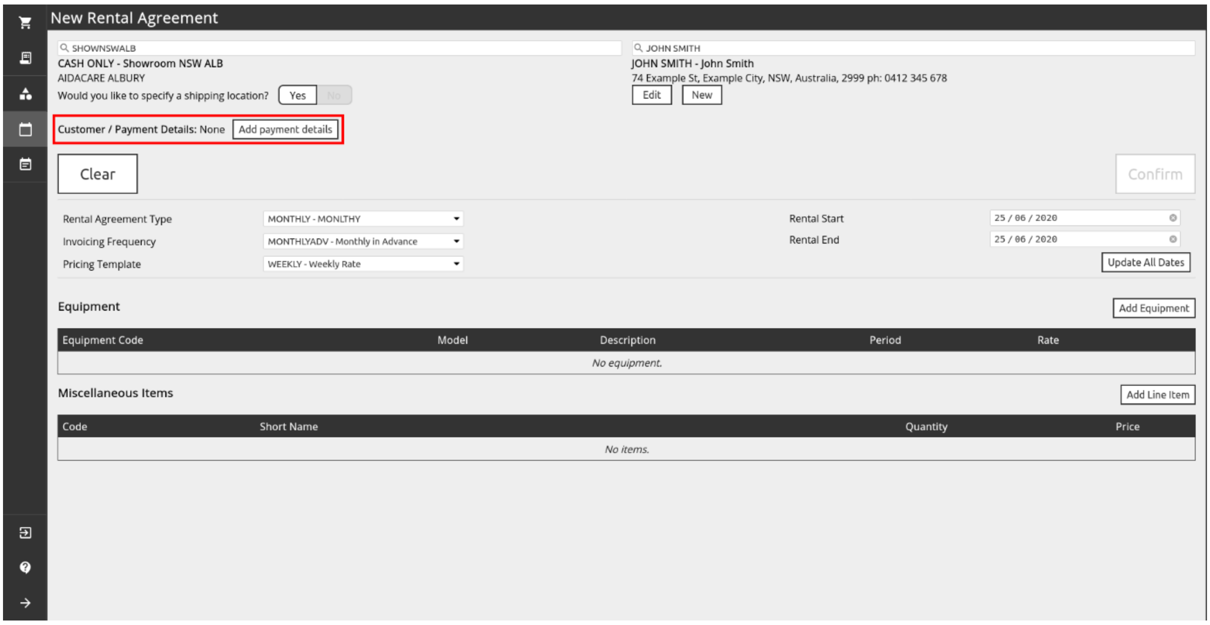
1. Navigate to the *New Rental Agreement* page by clicking the **New Rental Agreement** button in the sidebar.



2. Select the customer and location for the rental.

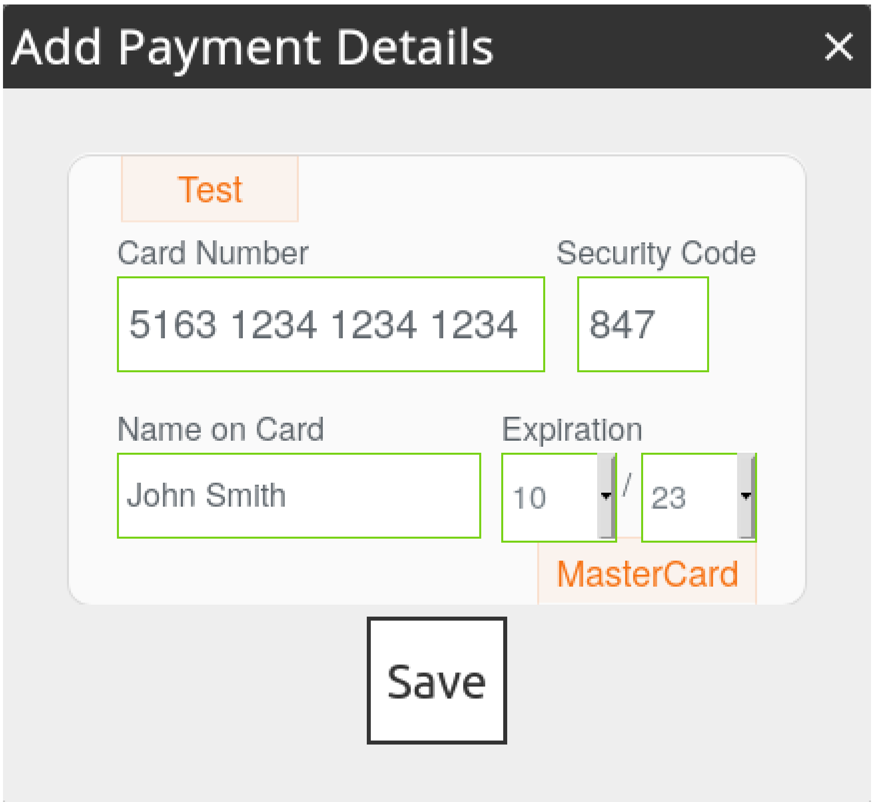


3. Verify the customer's card details.

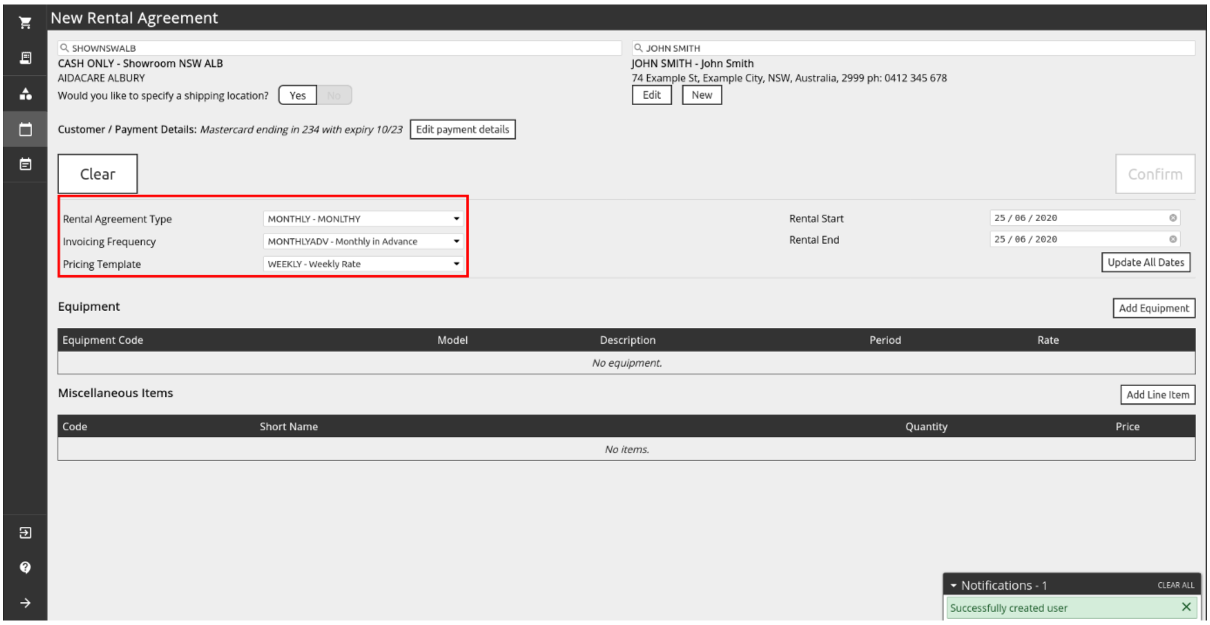


3a. If the payment details don't exist or are incorrect, use **Edit payment details** to update them.

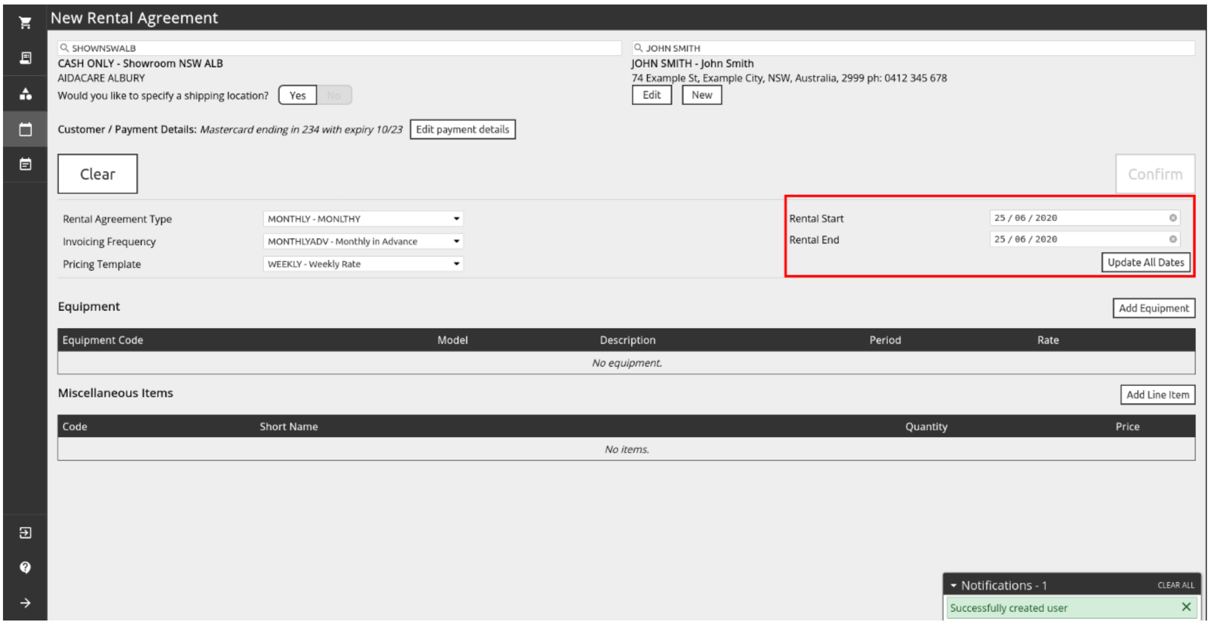
3b. Enter the card details into the provided form.



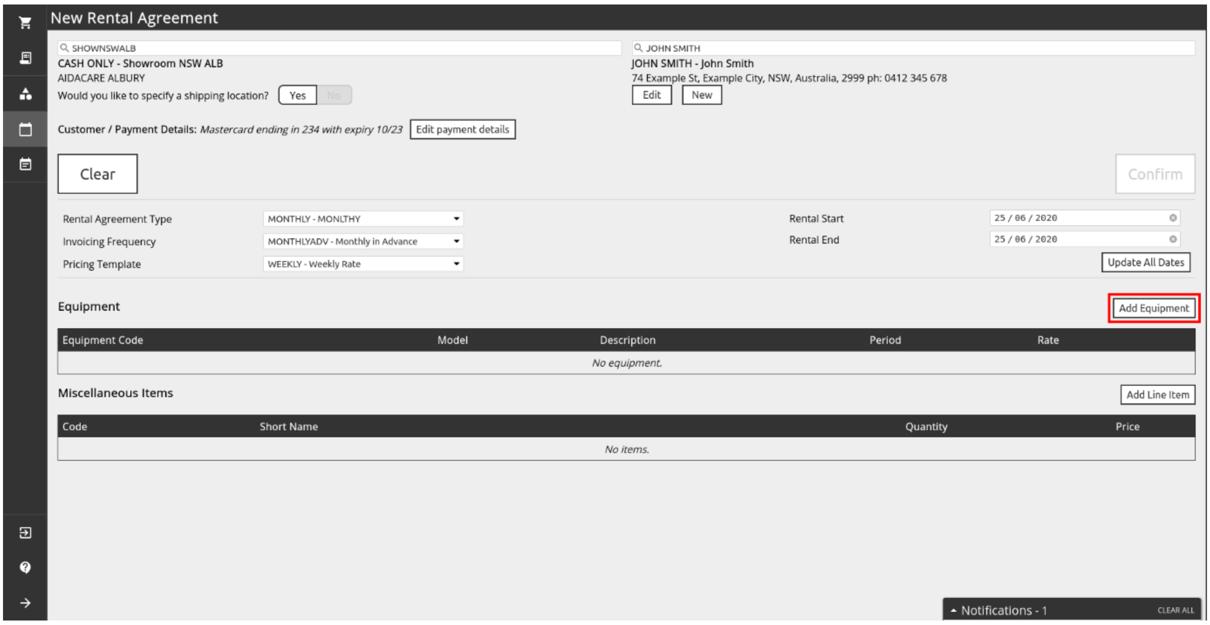
4. Set the rental agreement type, invoicing frequency, and pricing template.



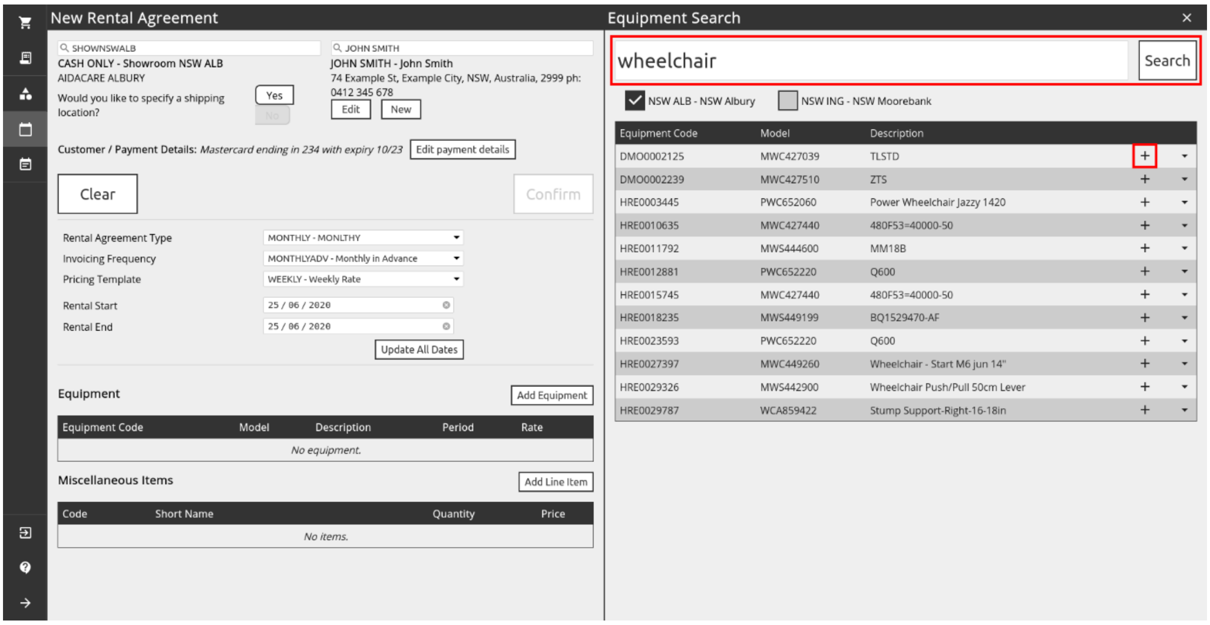
5. Set the overall rental start and end period.



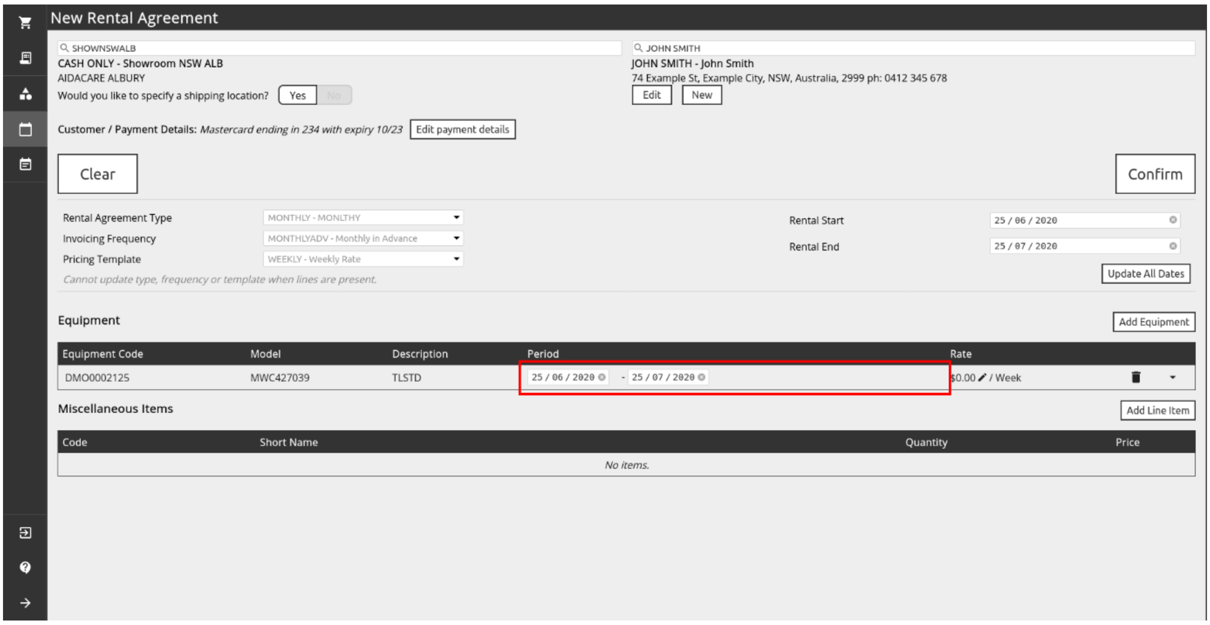
6. Press the **Add Equipment** button to search for equipment to rent out.



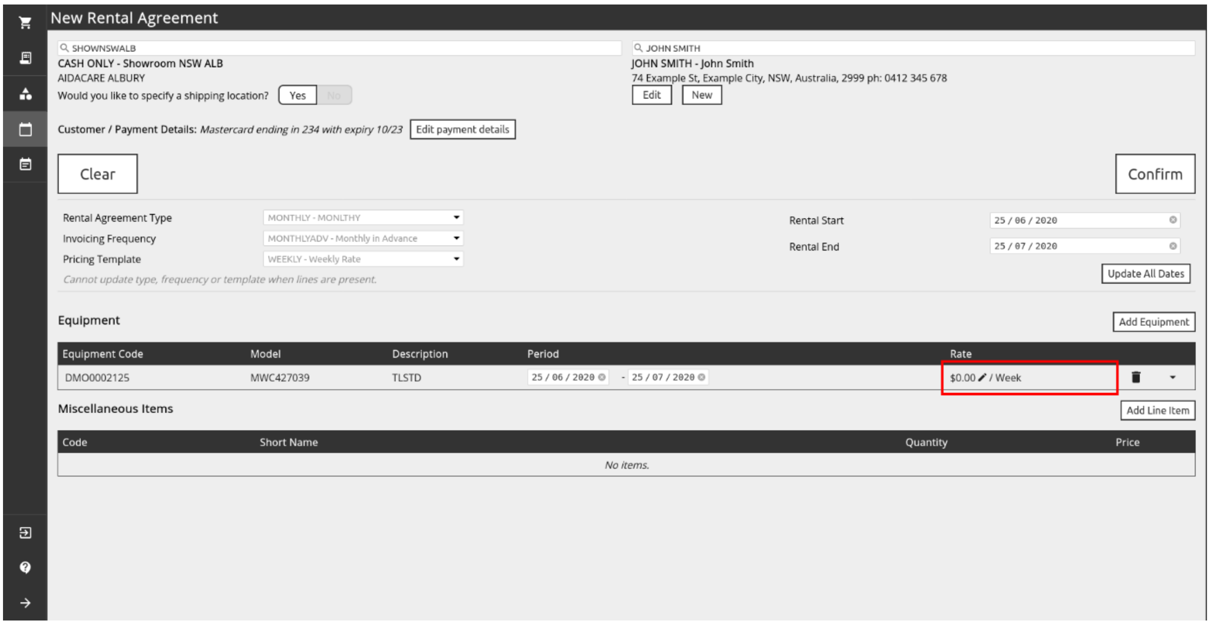
7. Search for the equipment and add it using the **+** button.



8. Set the rental period for the piece of equipment.

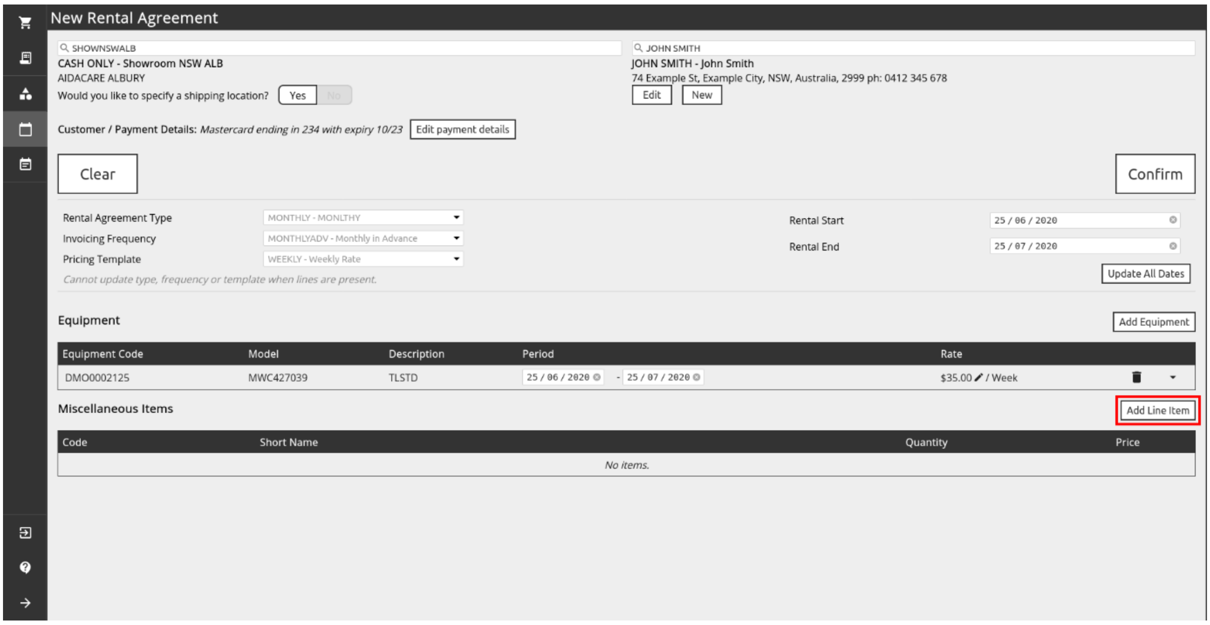


9. Set the rental rate for the equipment.

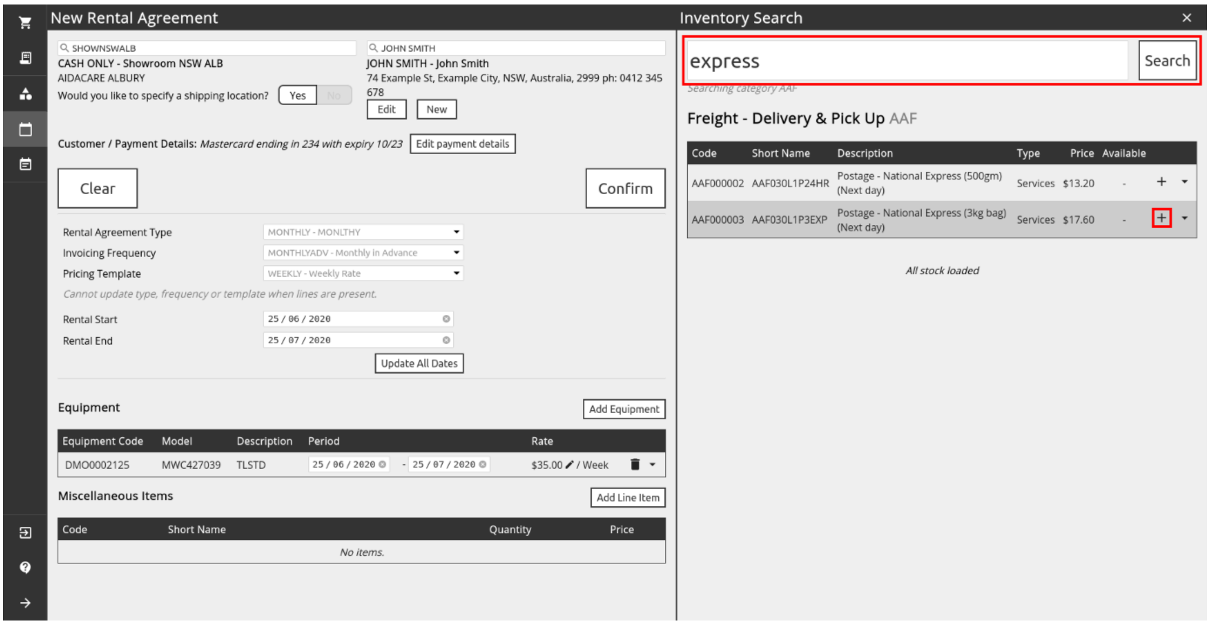


10. Repeat steps 6-7 for each extra piece of equipment to rent.

11. If there is a shipping charge, press the **Add Line item** button.

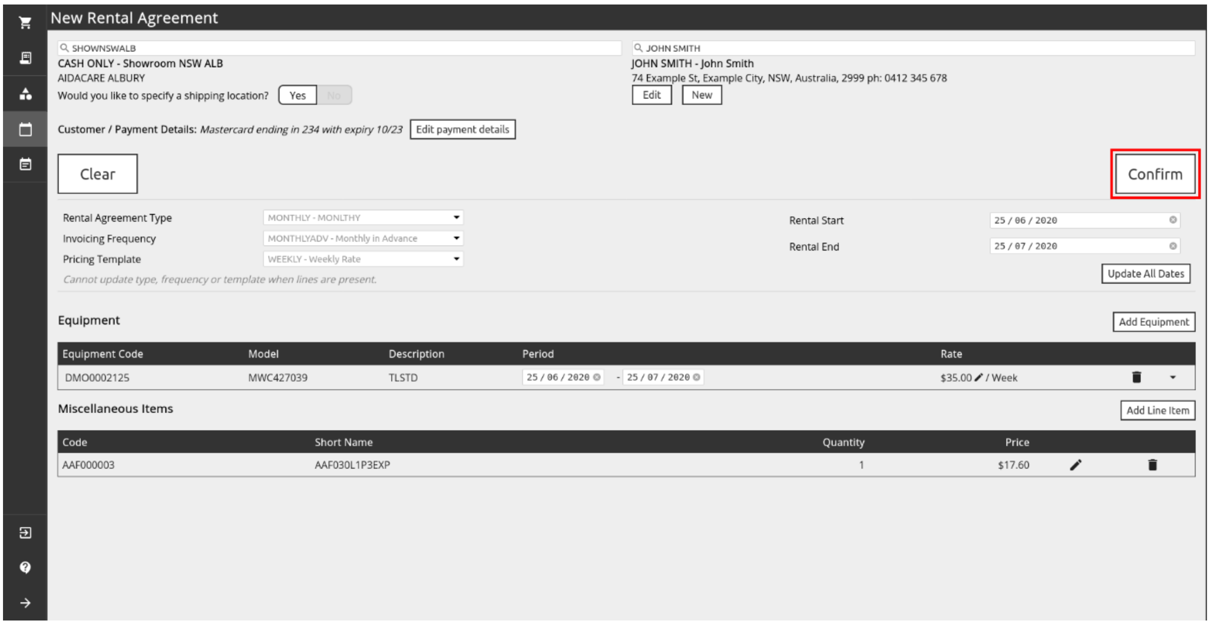


12. Search for the shipping charge, then press **+** to add it.



13. Repeat steps 11-12 for any extra shipping charges.

14. Verify all information is correct, then click the **Confirm** button.



Scanner Set Up

1. Connect scanner dock to PC via USB
2. Dock scanner in cradle to turn on
3. Undock scanner and scan Barcode at the back of the dock

4. Scan barcode below