LOYVERSE
LOYALTY UNIVERSE

POS System and Inventory Management

User guide

Last updated: February 2023

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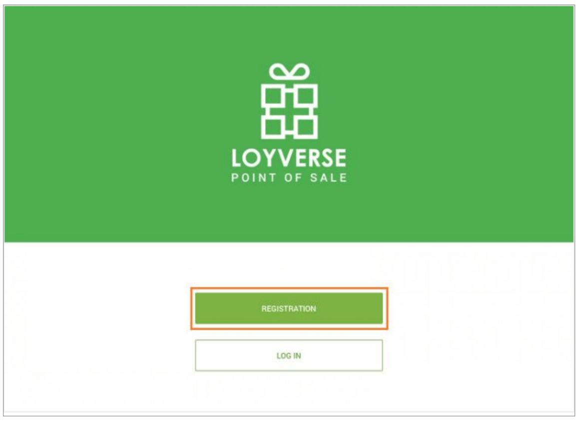
1. Getting Started

1.1 How to Get Started with Loyverse POS

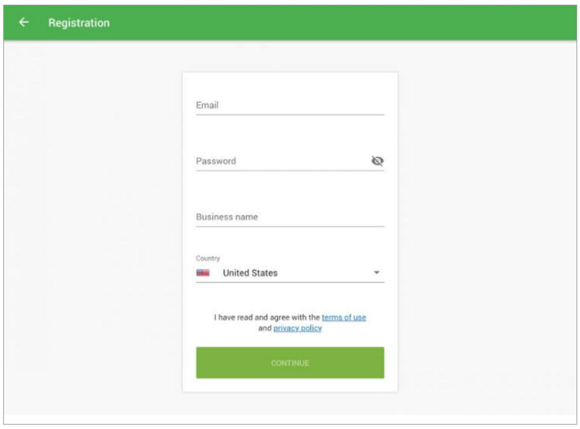
1



Download and install Loyverse POS from the Play Market or App Store. To use Loyverse POS, you'll need to have at least Android 5.0+ or iOS 11.0+.

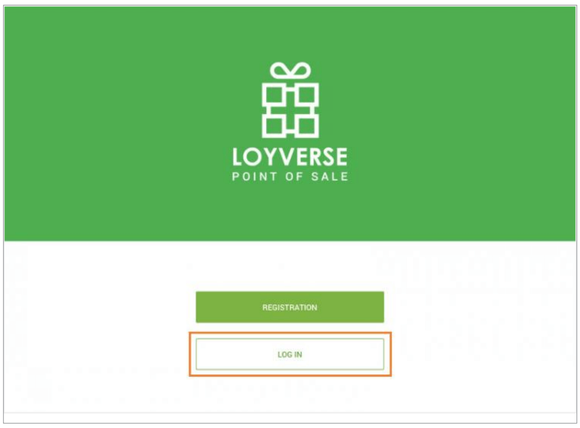
When you run the application, you will see the welcoming screen.
If you have not yet registered on the website, you can register now by tapping on the 'Registration' button.

2



Create your account by filling in the simple registration form.

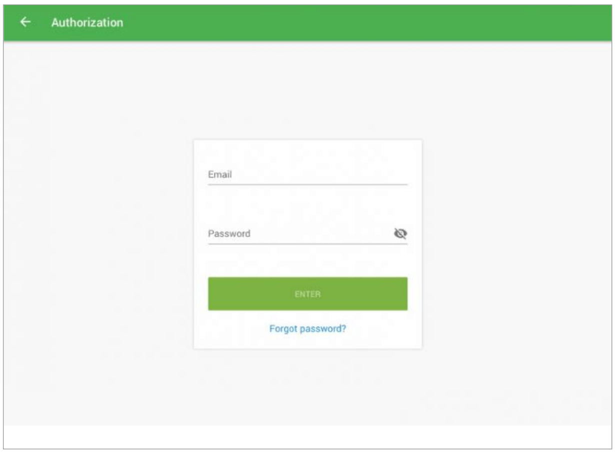
3



Go to your email inbox — you should have received a letter from Loyverse. Please open it and confirm your email address by following the link included in the letter.

Tap 'Login' button to enter the app.

4



Log in procedure:

- Enter the email address you used during registration.
- Enter your password.
- Press the 'Enter' button. You have successfully entered Loyverse POS.

1.2 Setting Up Your Shop in Loyverse Back Office

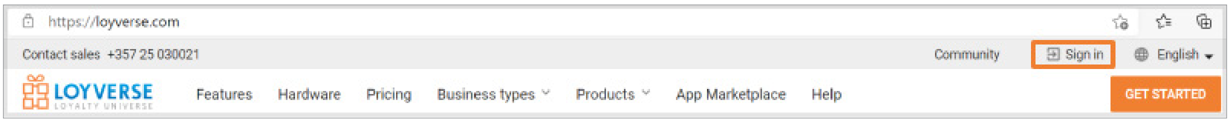
The Back Office is your web-based office, working in synchronization with the Loyverse POS App

Once you have installed the Loyverse POS app, the next step is to go to your shop settings in the Back Office.

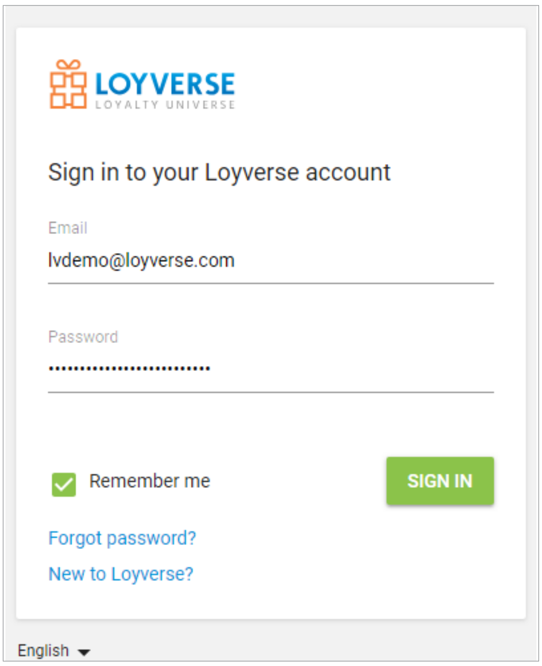
Google Chrome is the recommended browser for using Back Office.

You can login to the Back Office from the Loyverse home page by clicking 'SIGN IN'.

1

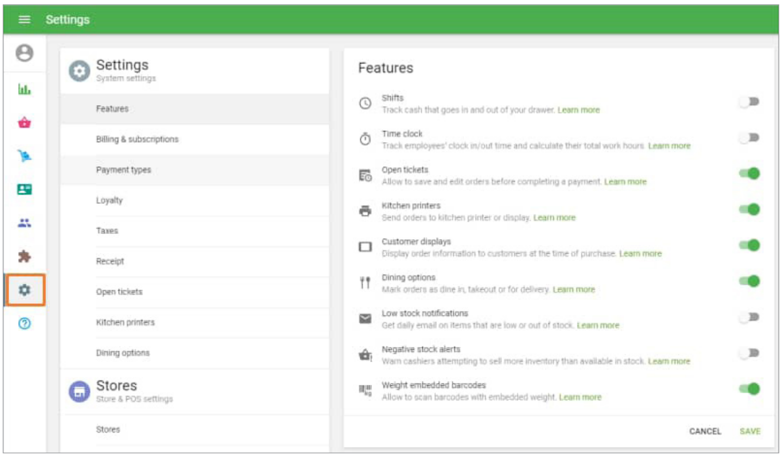


2



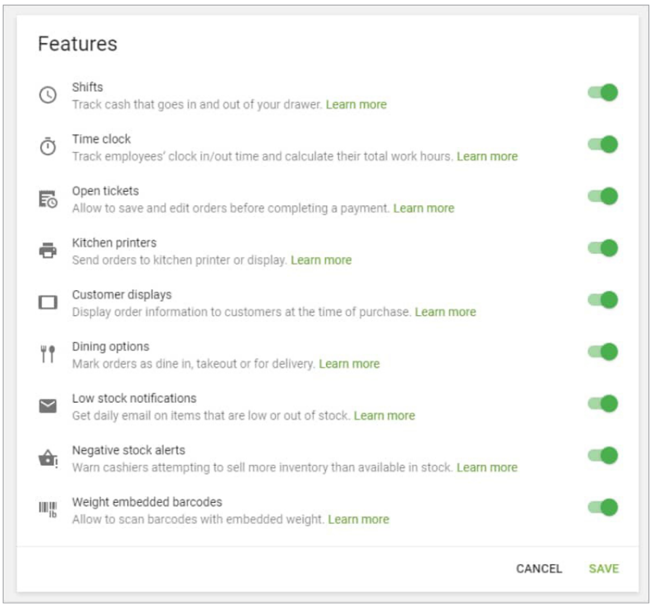
Enter the registered email and password.

3



Click on the Settings icon on the left menu to go to the System settings.

4



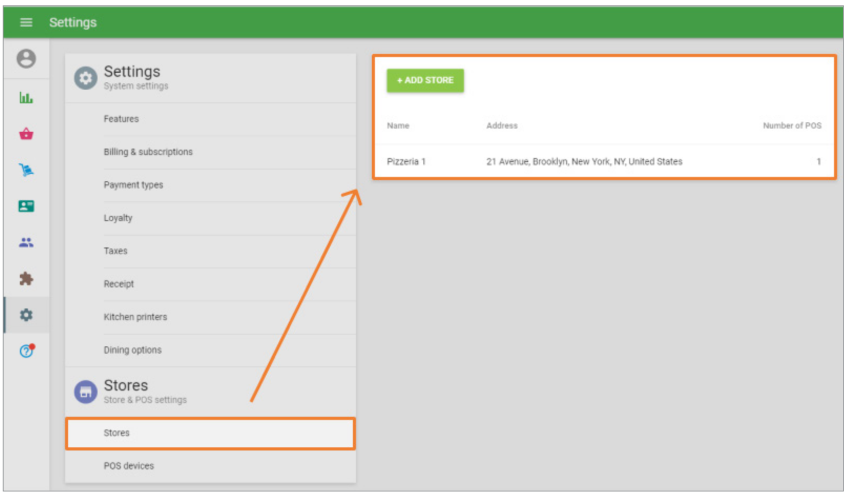
In the 'Features' section, you can switch on parameters such as 'Shifts', 'Time clock', 'Open tickets', 'Kitchen printers', 'Customer displays', 'Dining options', 'Low stock notifications, 'Negative stock alerts', 'Weight embedded barcodes'.

Once the profile settings are complete, press 'Save'.

1.2.1 Store Information

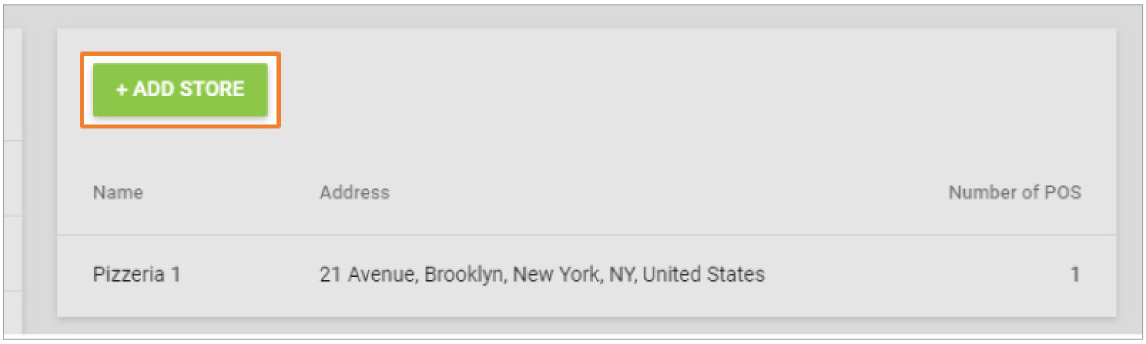
When you click 'Stores' in the Settings, you can enter your shop's address, description, and phone number.

1



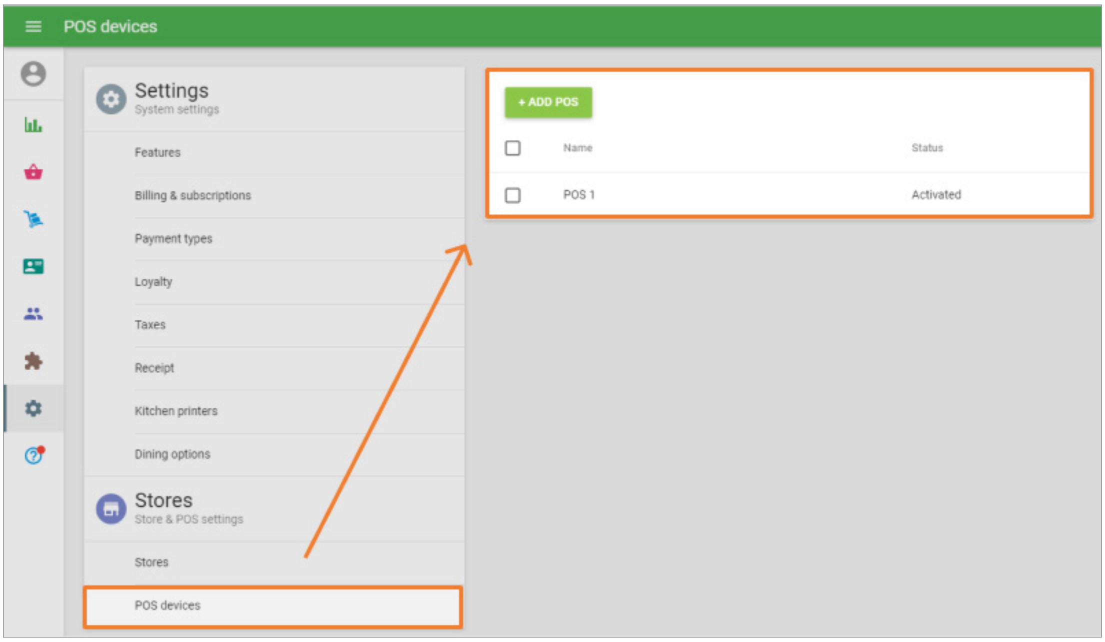
If you have more than one store, you can add them too.

2

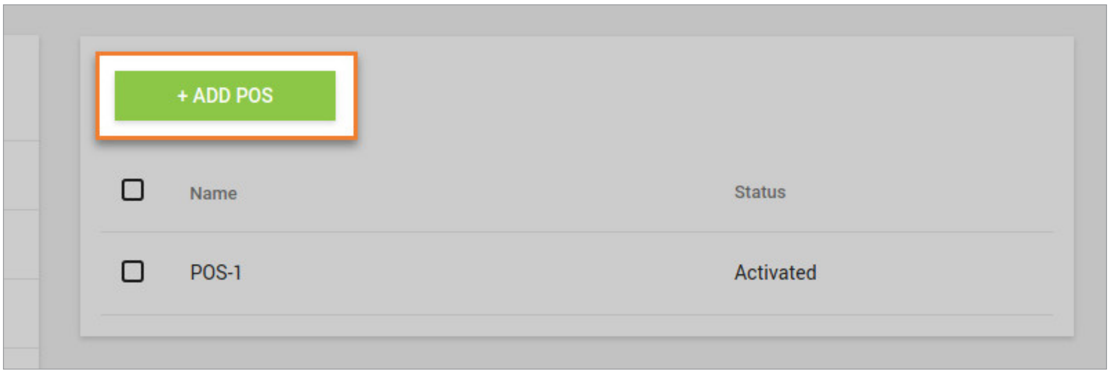


If you have more than one register, you can add a register in 'POS devices' under the 'Stores' section as well. Remember to click 'Save'.

3



4



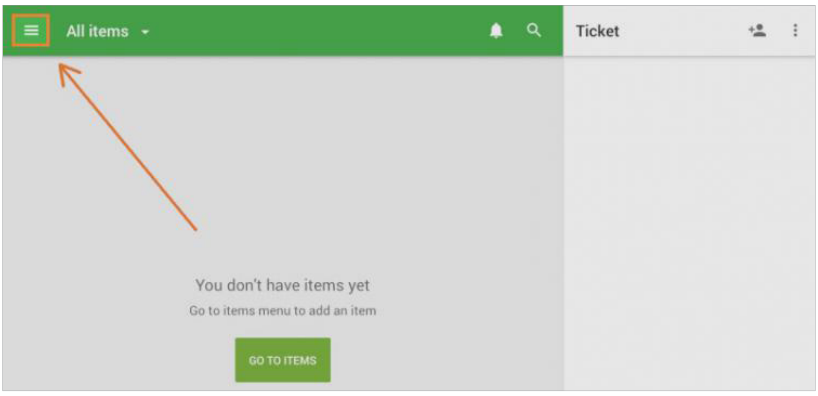
After you finish setting up your shop in the Back Office, you can go to the Loyverse POS App to add products, make sales, and continue your business momentum!

1.3 How to Add Items and Categories in Loyverse POS

1.3.1 Adding items

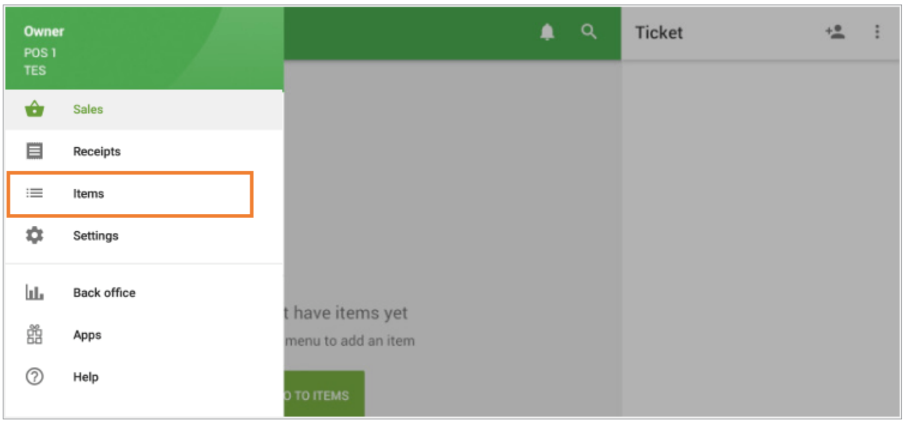
It’s quick and simple to add items and categories in the Loyverse POS right from your smart-phone or tablet.
Once you are logged in, press the ☰ (menu) button at the top left corner.

1



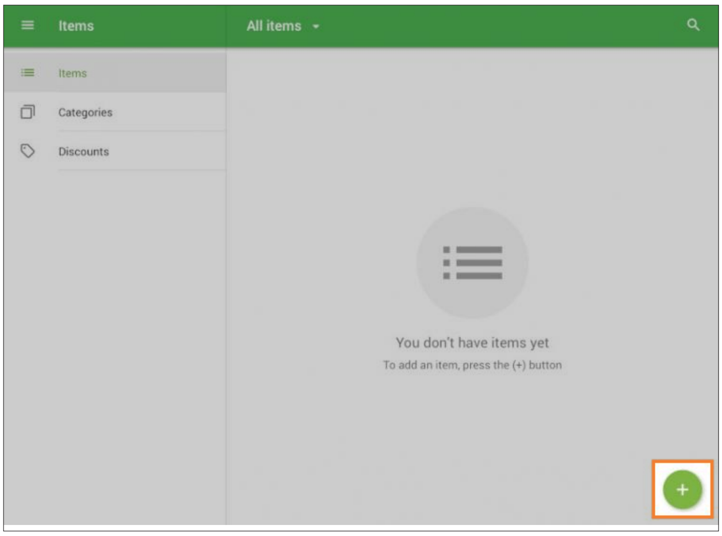
Next, select the ‘Items’ menu.

2

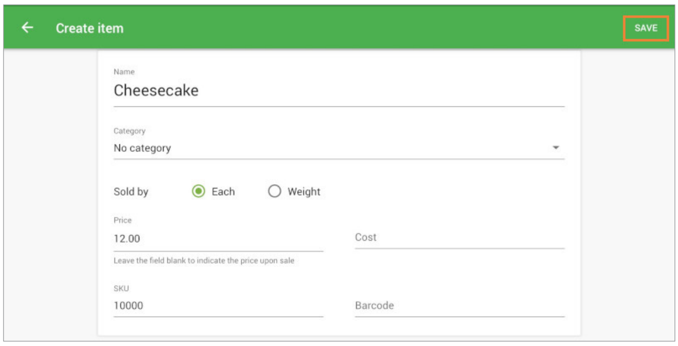


Then tap the ⊕ (add) button at the bottom right corner.

3



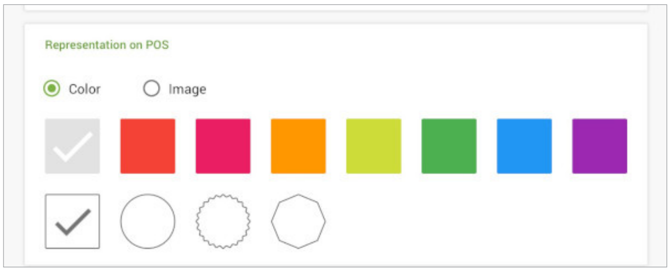
4



In the 'Create item' page, you can add details such as the 'Item name', 'Price', 'Category', and other details such as the SKU and Barcode, if necessary.

You can pick a color and shape for the item icon or take/upload its picture to display it on the sales screen.

5



Don't forget to save changes.

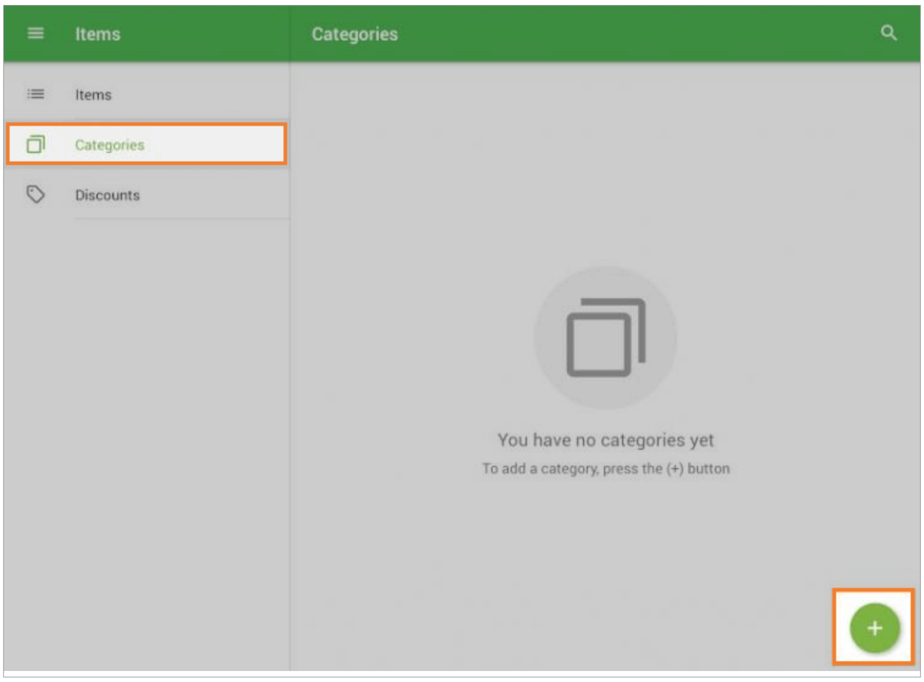
1.3.2 Adding Categories

When you sell different types of items, it is easier to categorize your items systematically.

You can add categories while adding the item, or you can go to the Categories page and follow these instructions:

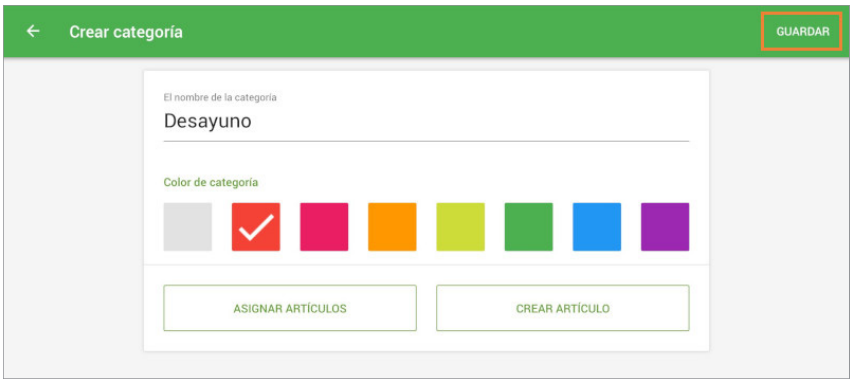
In the 'Items' menu, tap the 'Categories' button. Tap the ⊕ (add) button at the bottom right corner.

1



Specify the category name, select a category color, and press the save button.

2



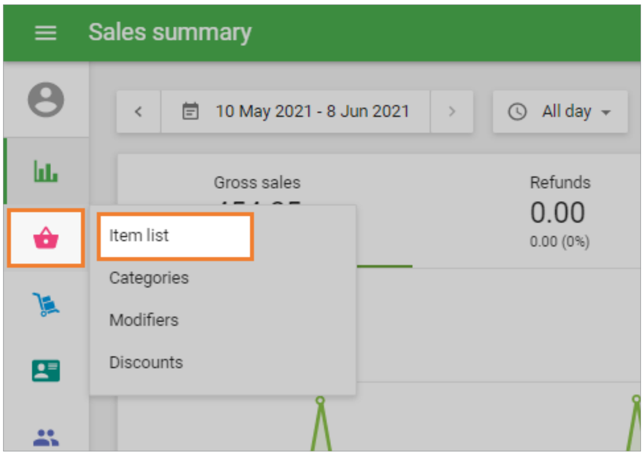
That's it — now you are ready to start selling!
You can excess extended item settings at your Back Office on the web.

1.4 How to Add Items in the Loyverse Back Office

It's quick and simple to add items on the Loyverse POS on your mobile device. However, if you do this in the Back Office, you can have access to more features for the item.

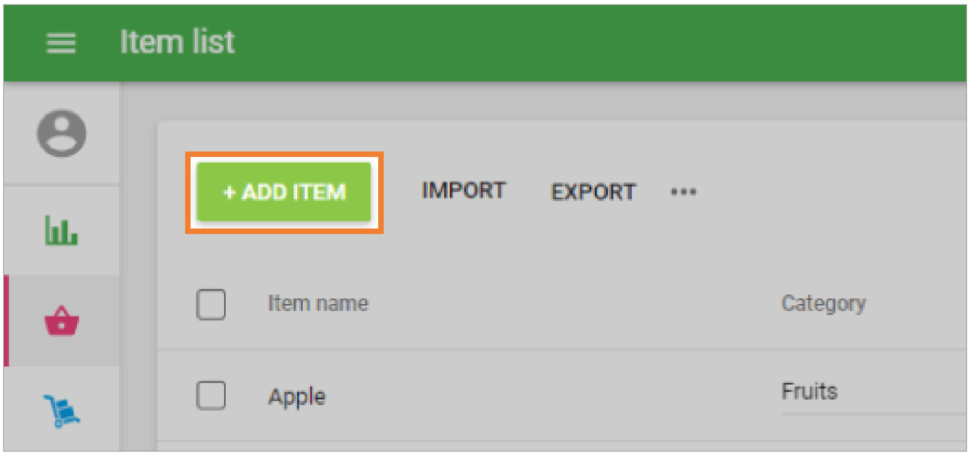
Go to the 'Item list' menu.

1



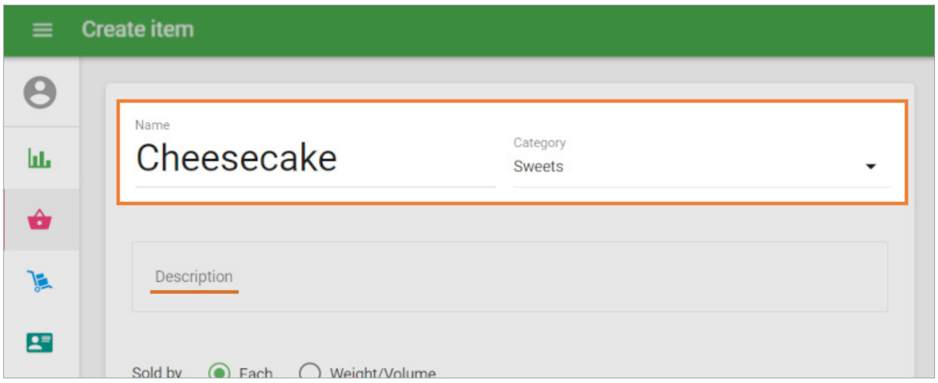
In the Item list, click the 'Add item' button.

2



In the ‘Create item’ form, fill in the item ‘Name’ and choose the ‘Category’.

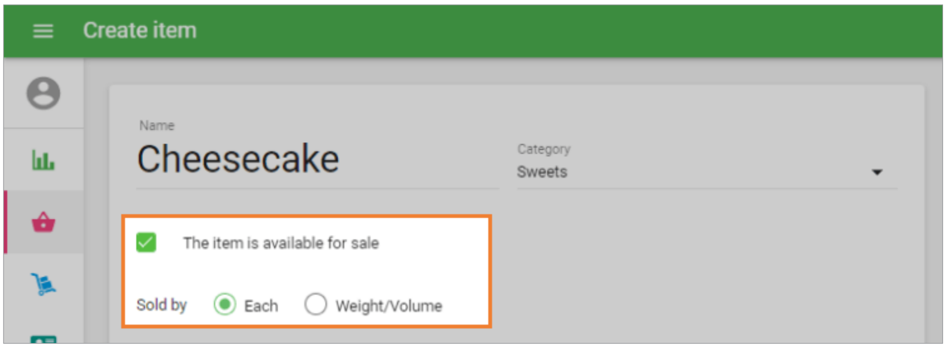
3



If you deselect the checkbox ‘The item is available for sale’ it will not be seen in the items list in Loyverse POS on a mobile device. This usually needed for composite item’s components.

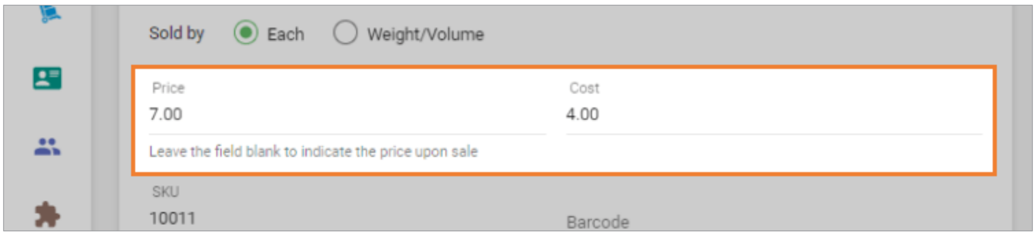
Whether an item is sold by piece (bottle, package, etc.) or by weight (pound, kilogram, etc.), it is determined by the ‘Sold by’ option.

4



Fill in the ‘Price’ field with the selling price of your product. When you fill in the cost, later you can get useful reports about your profit, margin etc.

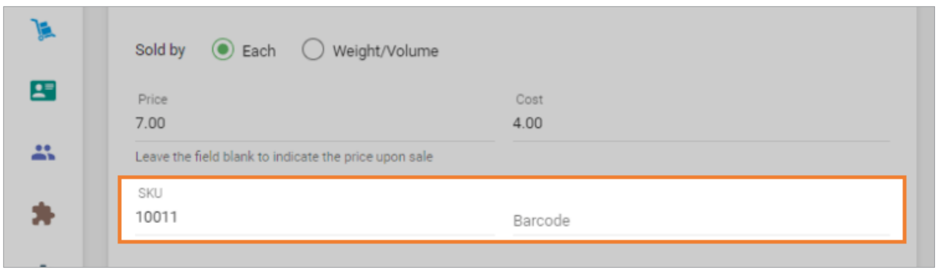
5



The field SKU (Stock Keeping Unit) is required. It is filled in automatically. However, you can indicate your own SKU. The main requirement is that the number must not be repeated in other items and should not exceed 40 characters. You can use numbers and letters as well.

Fill in Barcode, if necessary.

6

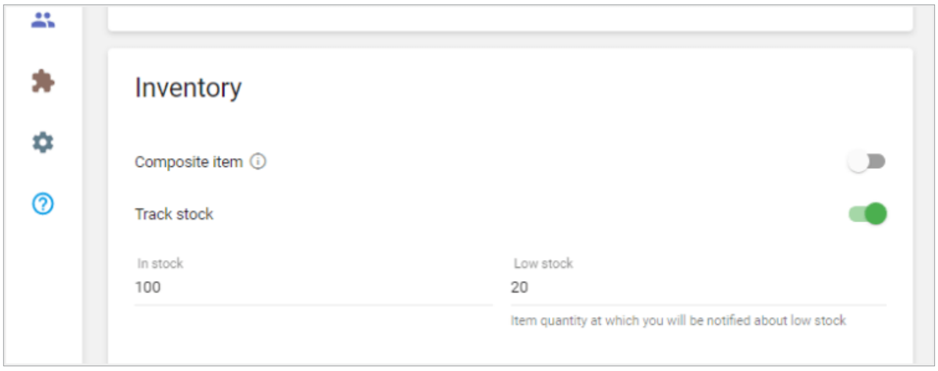


In the inventory section, you can choose the options: 'Composite item' and 'Track stock'.

7

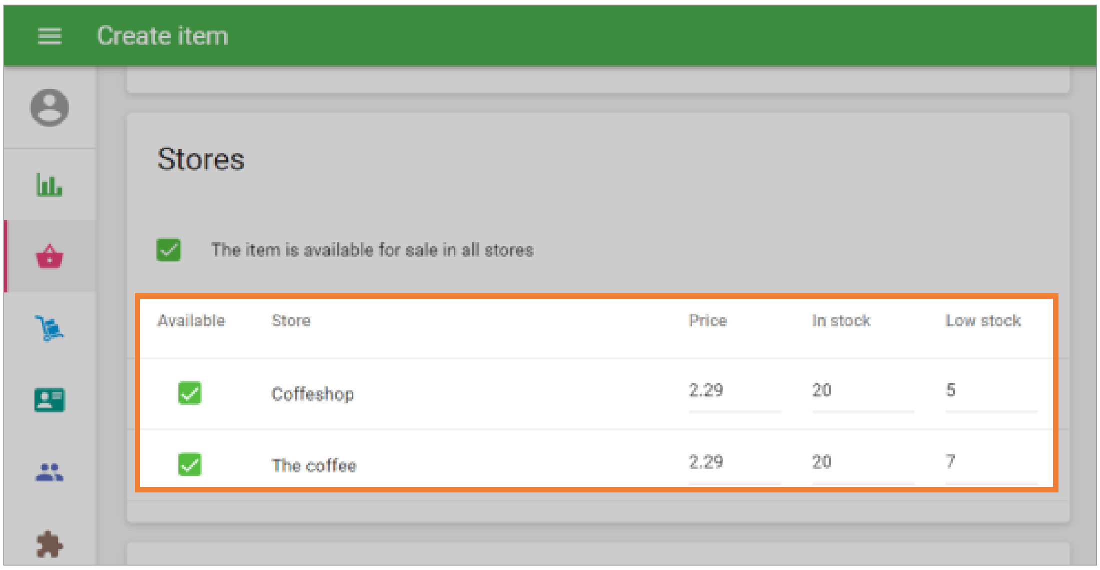
By enabling 'Track stock' you can add the quantity of your stock level and the quantity at which you will receive the low stock notification.

8



If you have multiple stores, you can manage the item parameters for each store, in the 'Stores' section: change the price, in-stock quantity, and quantity for low stock notification.

9

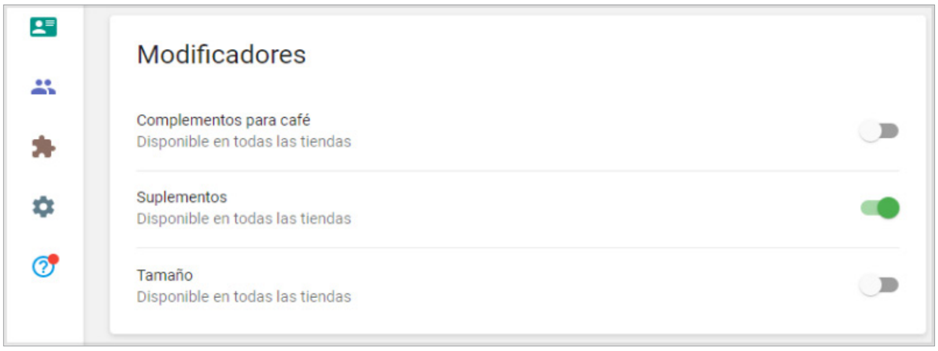


In the 'Tax' section, you can choose the taxes for your item.

10

In the 'Modifiers' section, you can choose the modifiers for your item.

11



In the 'Representation on POS' section, you can pick a color and shape for the item icon or upload its' picture.

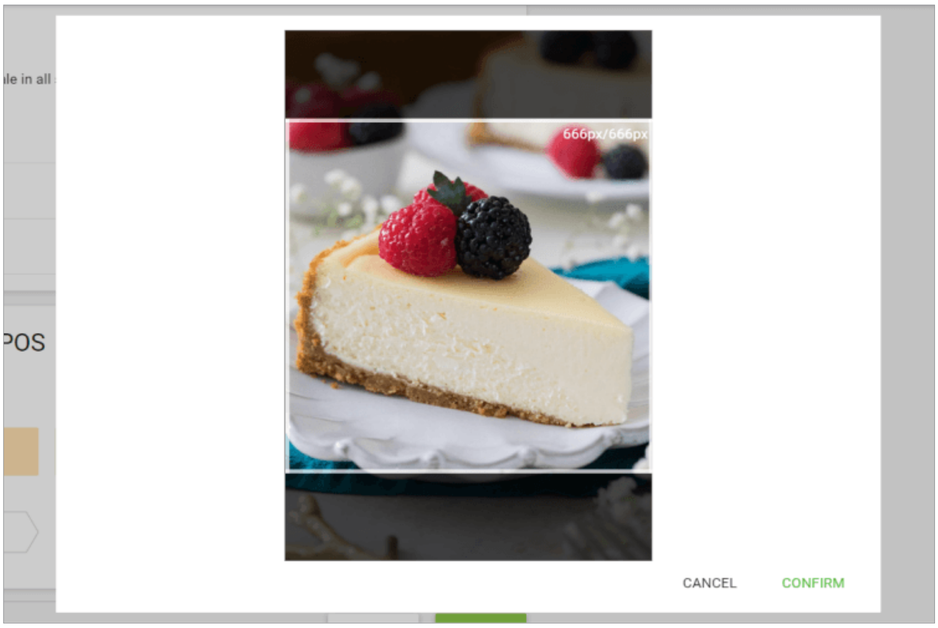
12

Don't forget to save changes.

Note

Loyverse uses only square images for item preview. If you upload an image with a different shape, you will have a dialog screen to crop the image to a square. Adjust the square to fit the portion of the image you wish to keep. Click the Confirm button.

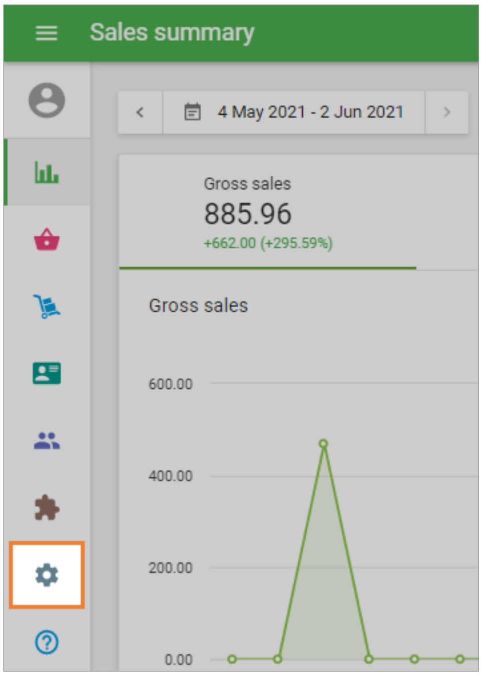
13



1.5 How to Configure Taxes in Loyverse

1.5.1 How to Configure Taxes in the Back Office

1

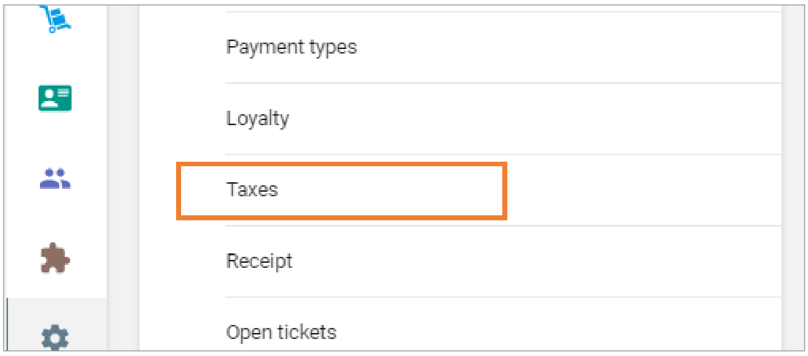


To configure taxes, you need first to sign in to the Back Office.

After signing in, go to Settings.

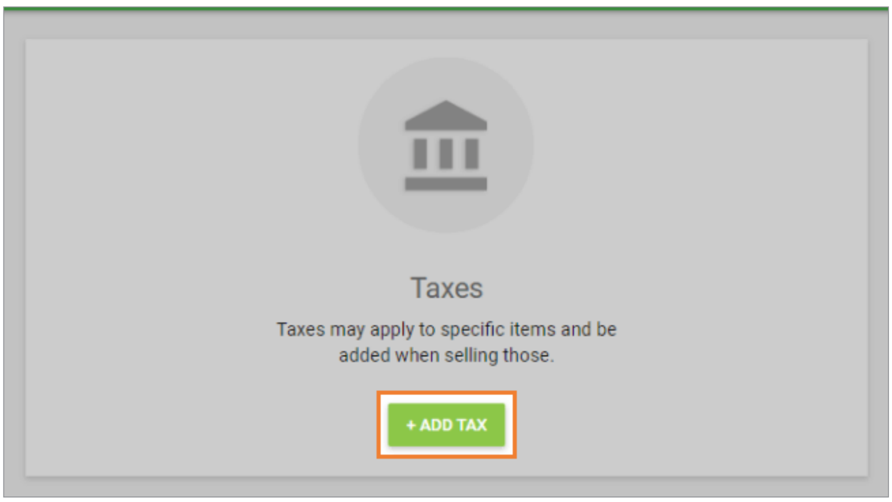
Then go to 'Taxes'.

2



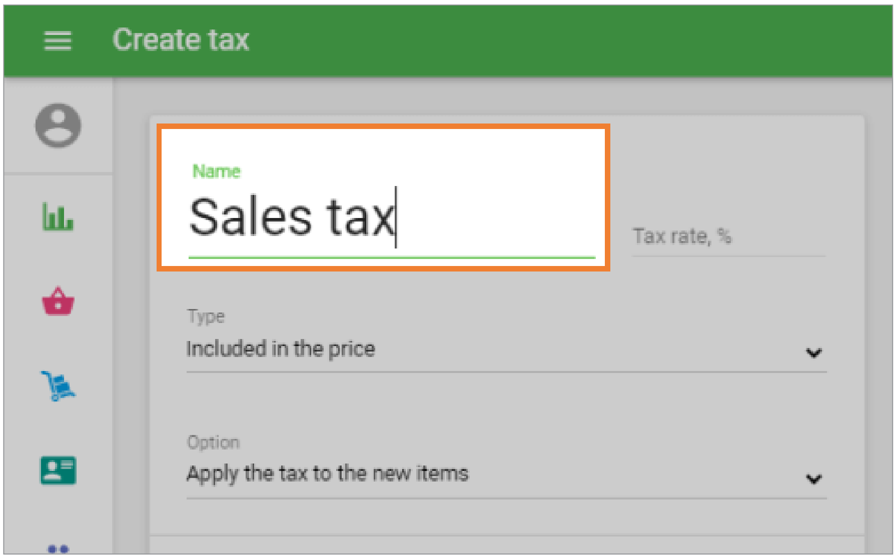
Then press 'ADD TAX'

3



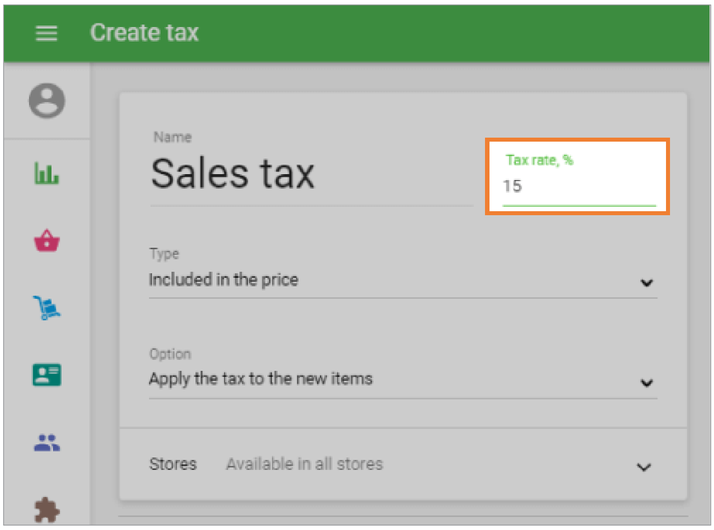
... and name the tax.

4



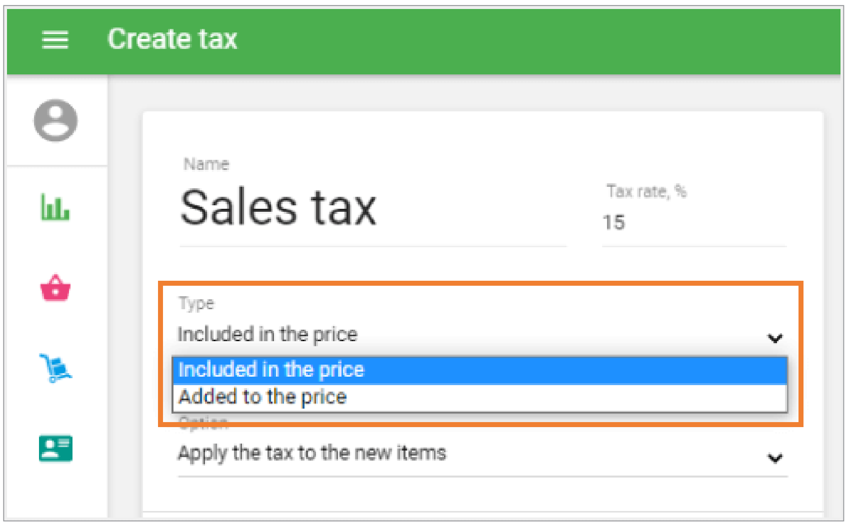
Then input the tax rate

5



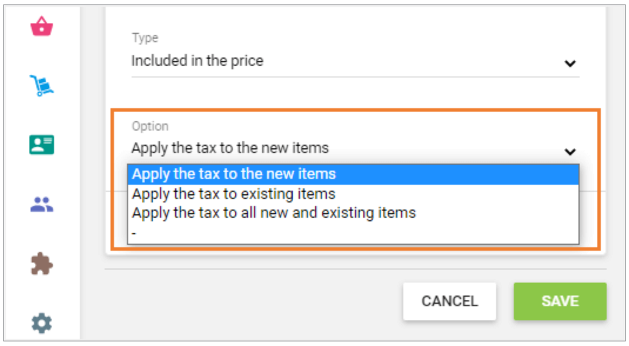
...and specify whether the tax should be included in the price, or if it will be added to the price at the counter..

6

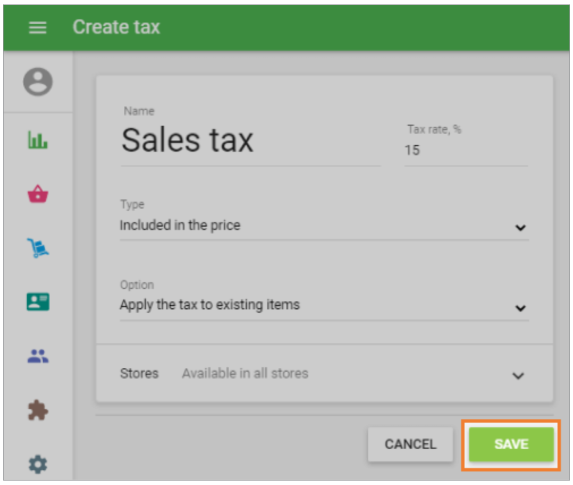


Select the items to which this tax should apply.

7



8



Then press ‘Save’.

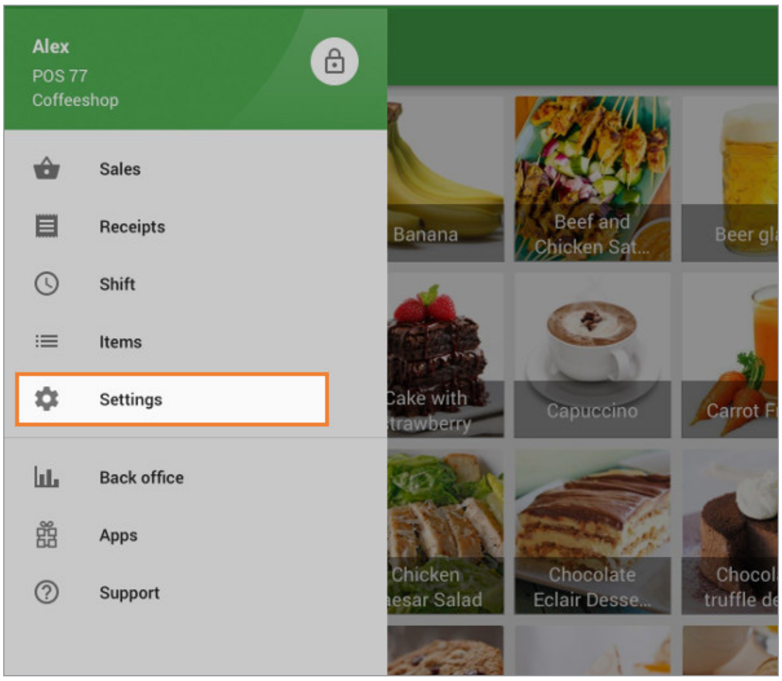
Now taxes are configured, they will be applied for each purchase.

1.5.2 How to Set Up Taxes in POS

You can set up and configure taxes in the Back Office.

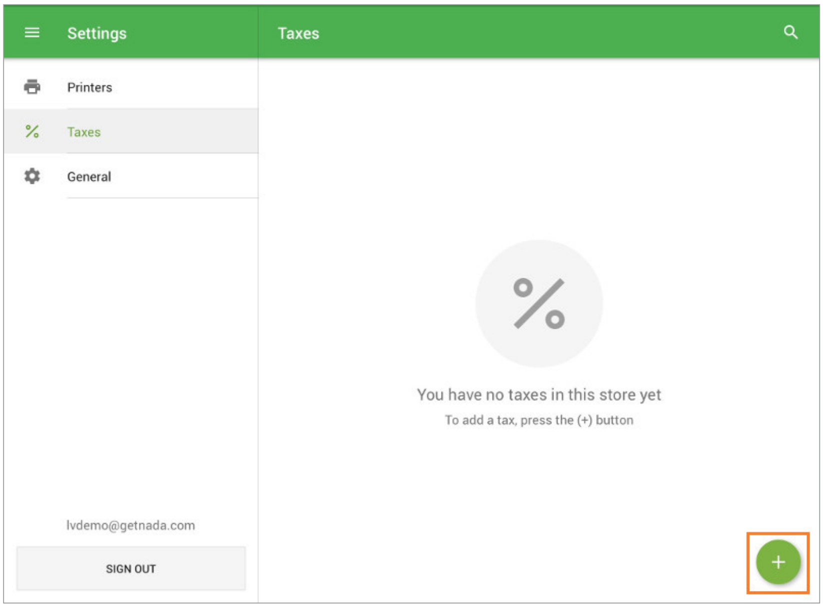
To create taxes in the POS, go to the ‘Taxes’ section from the ‘Settings’ menu.

1



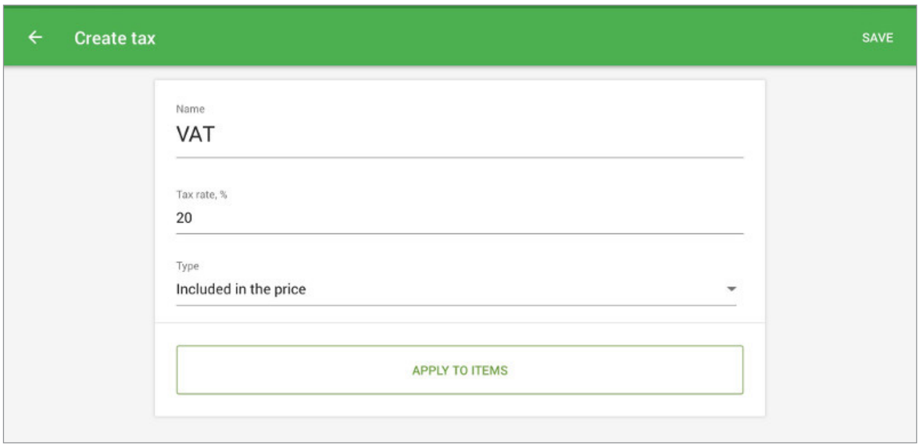
Create a tax by tapping on the '+' button.

2



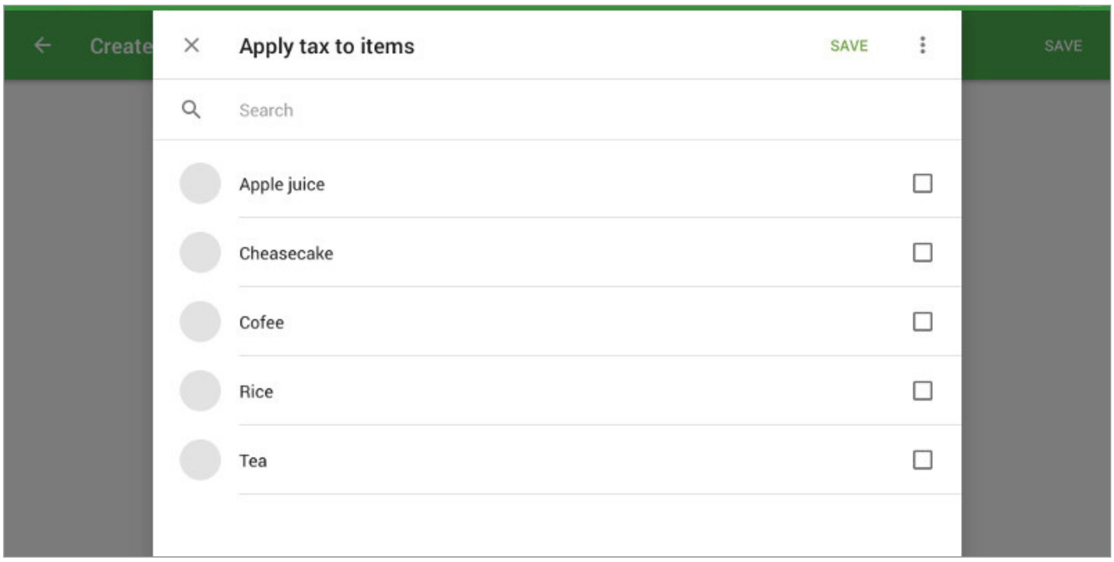
Name the tax, input the tax rate, and specify whether the tax should be 'included in the price' or 'added to the price'. Then tap 'Apply to items'.

3



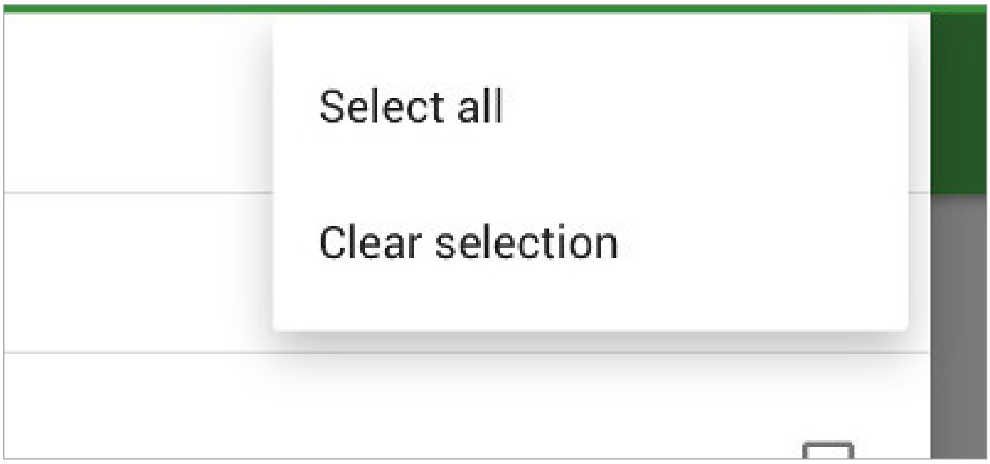
Select items to which this tax will be applied.

4



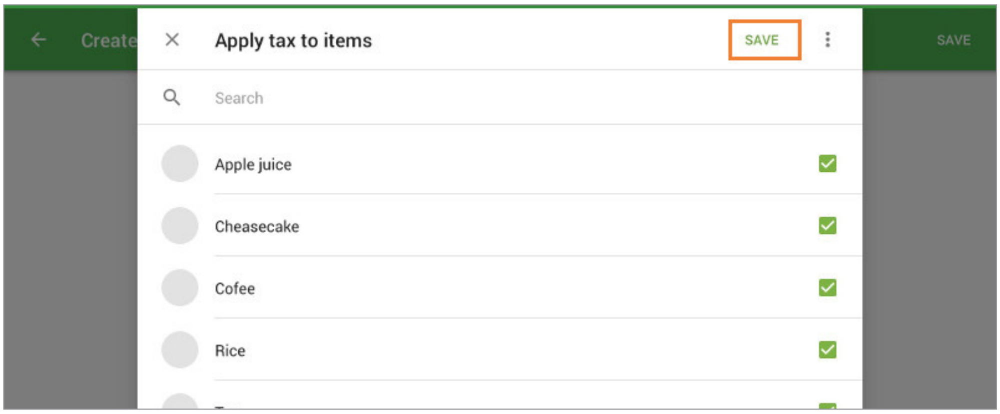
You can 'Select all' items through the three dots menu.

5



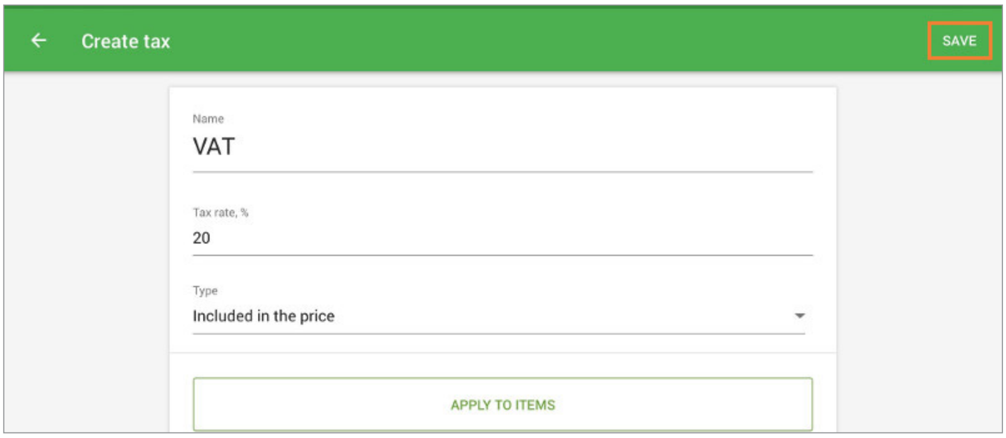
Save your selection.

6



Then save your tax.

7



From now on, the tax will be applied automatically during each purchase.

Note

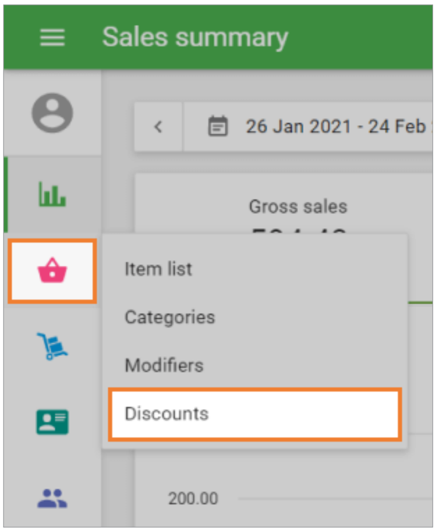
If you have multiple stores, the tax created in the POS will be available only in the store that the current POS belongs to. You can change the availability of this tax in the Back Office.
If you delete the tax in the POS, it will be deleted from the Back Office as well.

1.6 How to Create and Configure Discounts

You can create and configure discounts at the Back Office and on the mobile App.

1.6.1 Discount set up in the Back Office

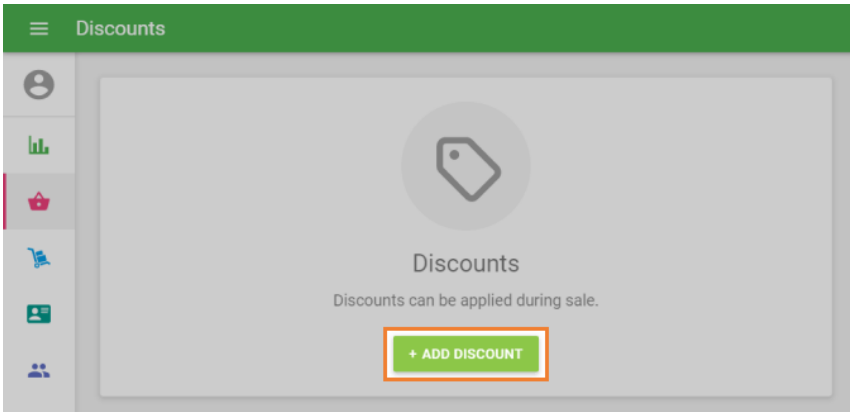
1



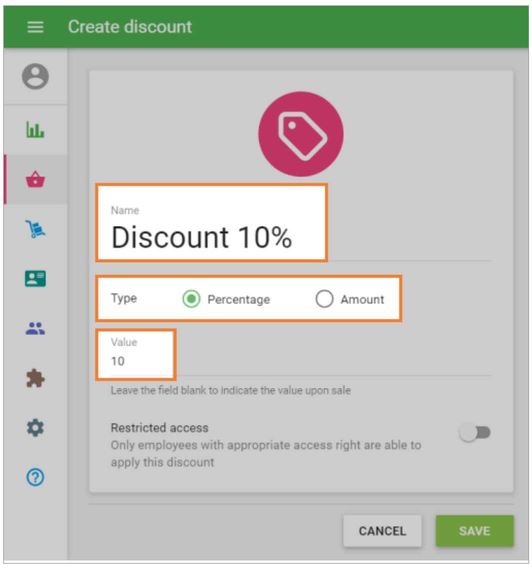
Log in to the Back Office. In the 'Items' menu section, select 'Discounts'.

To create a discount, click on the '+ ADD DISCOUNT' button.

2



3



Fill in the 'Name' field. Then choose one of the two discount types: 'Percentage' or 'Amount'. The 'Percentage' discount can be applied to both the whole ticket or to individual items. The 'Amount' discount is applicable only to the whole ticket.

Fill in the ‘Value’ field.

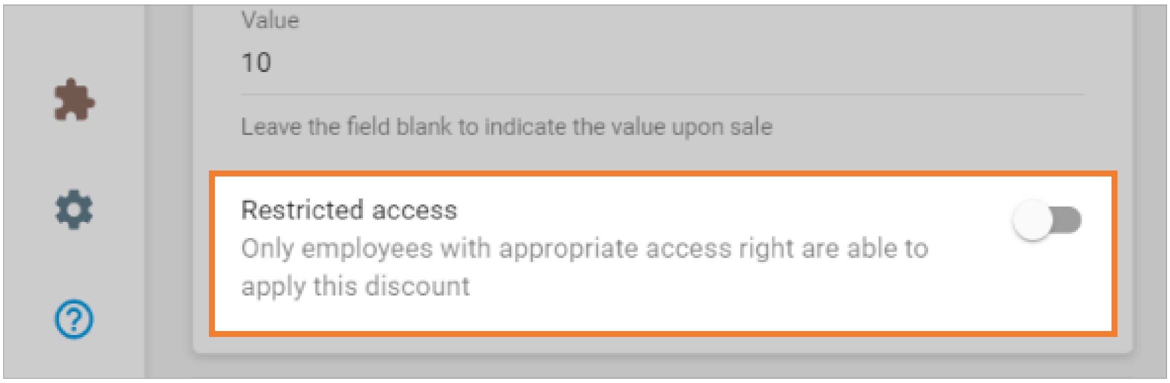
If you choose the ‘Percent’ type of discount, then the number in the ‘Value’ field will specify the percentage that will be deducted from the items’ original price or the whole ticket. The value of a percentage discount cannot be less than 0.01% or more than 100%.

If you choose the ‘Amount’ type of discount, then the number in the ‘Value’ field will specify a discount amount that will be deducted from the total value.

It is not always necessary to fill in the ‘Value’ field. You may specify the value of a discount during the sale. But you can apply such a discount only to the whole ticket.

If the ‘Restricted access’ option is activated, then only the employees with the access right will be able to apply this discount.

4

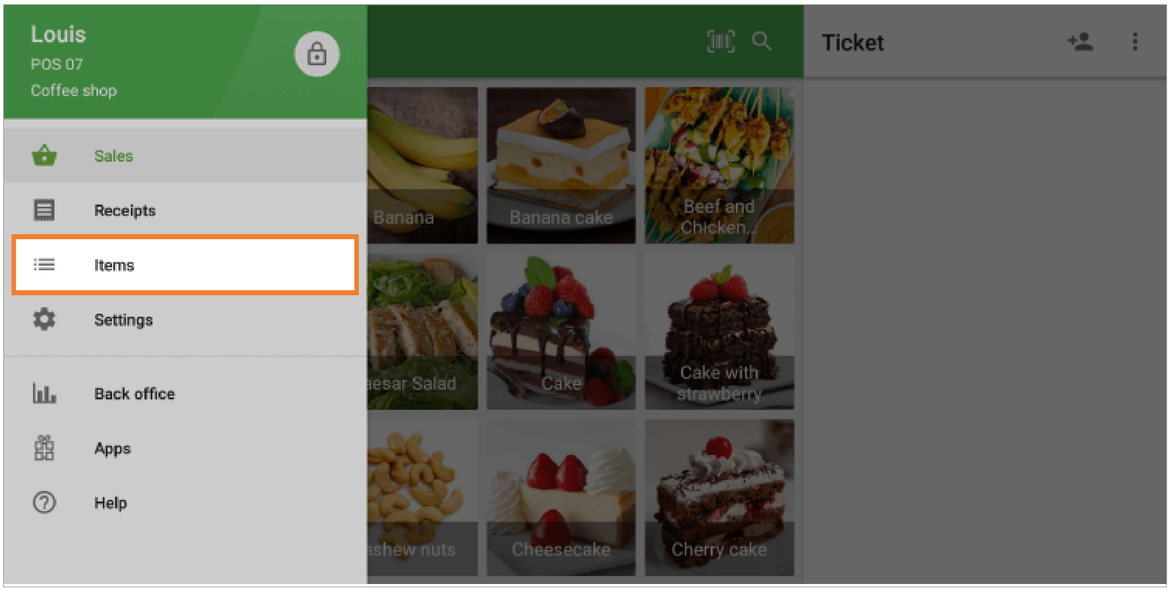


Don’t forget to save your changes.

1.6.2 Discount set up in the mobile application

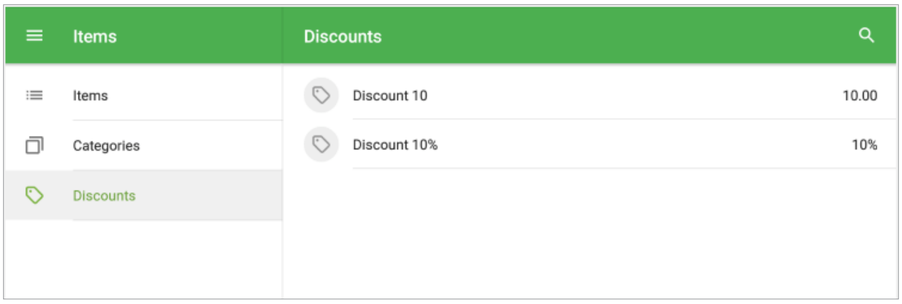
To create, view, edit or remove a discount, select the section ‘Items’ in the App’s menu.

1



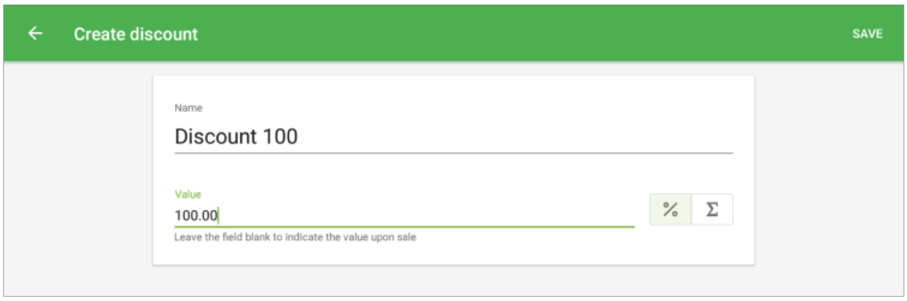
Go to the ‘Discounts’ section where you will see all the discounts created in the Back Office and the app itself. If you want to create more discounts, tap the ‘+’ button at the bottom right corner.

2



In the opened form, fill in the fields the same way as in the Back Office. Choose the discount type: percent – %, or amount – ∑.

3

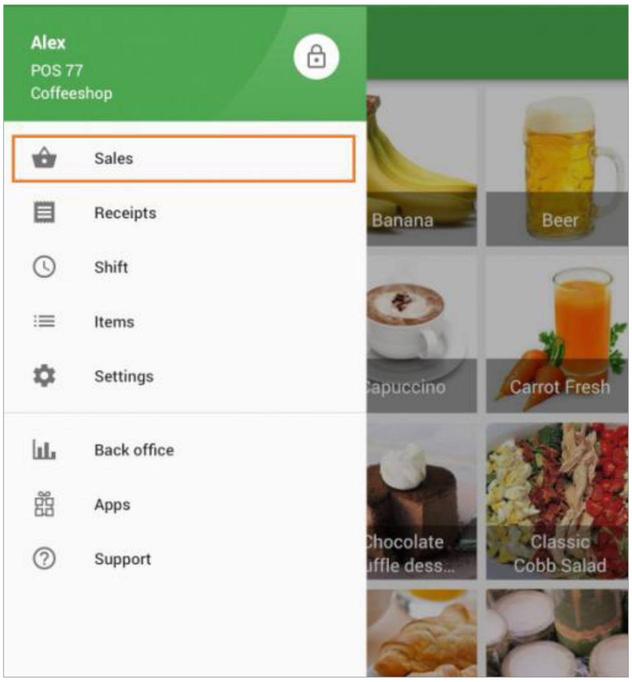


Don’t forget to save changes.
Then, after you have created the discounts, you can apply them during the sale.

1.7 How to Make Sales

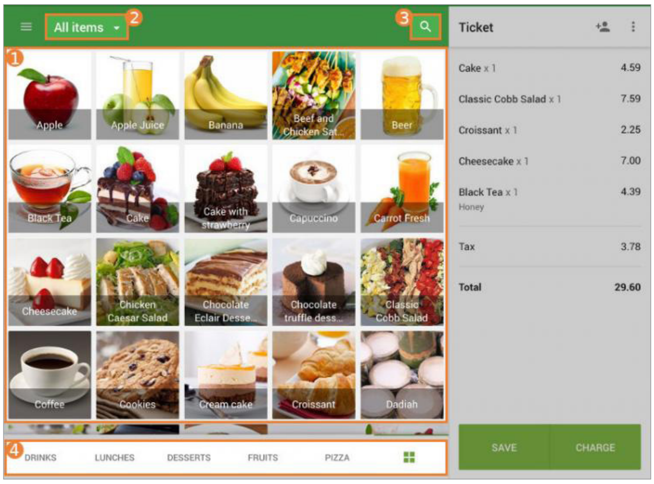
Launch your Loyverse POS app (Play Market or App Store) and go to the ‘Sales’ screen.

1



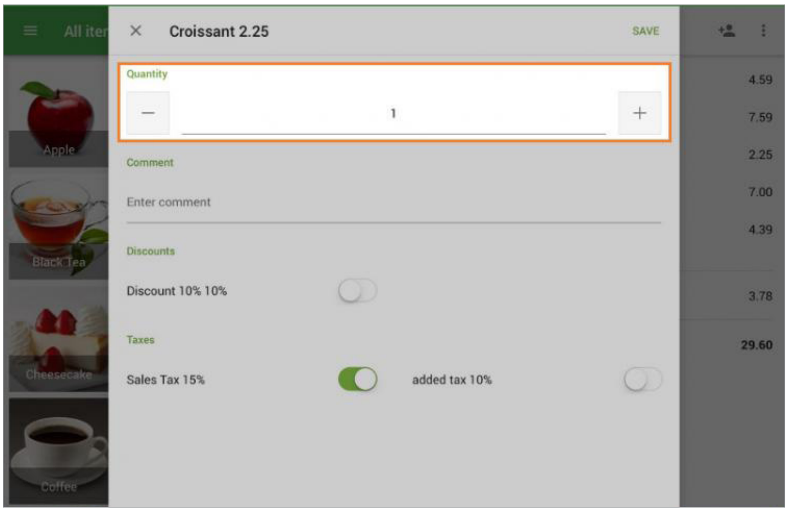
1. Tap on the item's image or icon on the sales screen to add the item to the ticket.
2. You can sort items by categories with the drop-down list 'All items'.
3. You can also use the search bar to look up items.
4. It is easy to find items by pages at the bottom of the screen.
See [How to Arrange Sale Screen in Loyverse POS.](#)

2



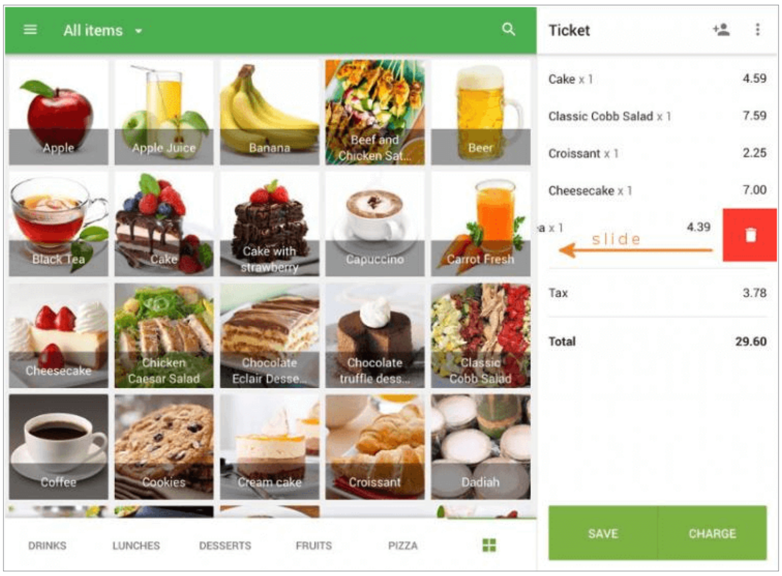
You can change the quantity of the items by tapping the item in the ticket.

3



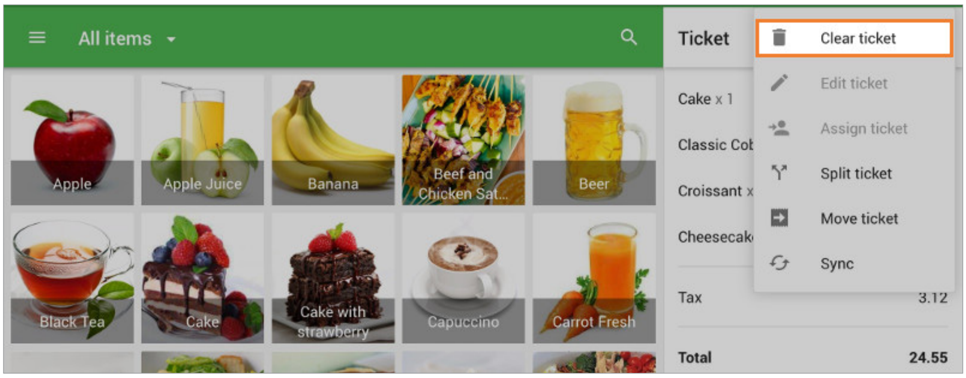
By sliding any selected item to the left, you can remove the item from the ticket.

4

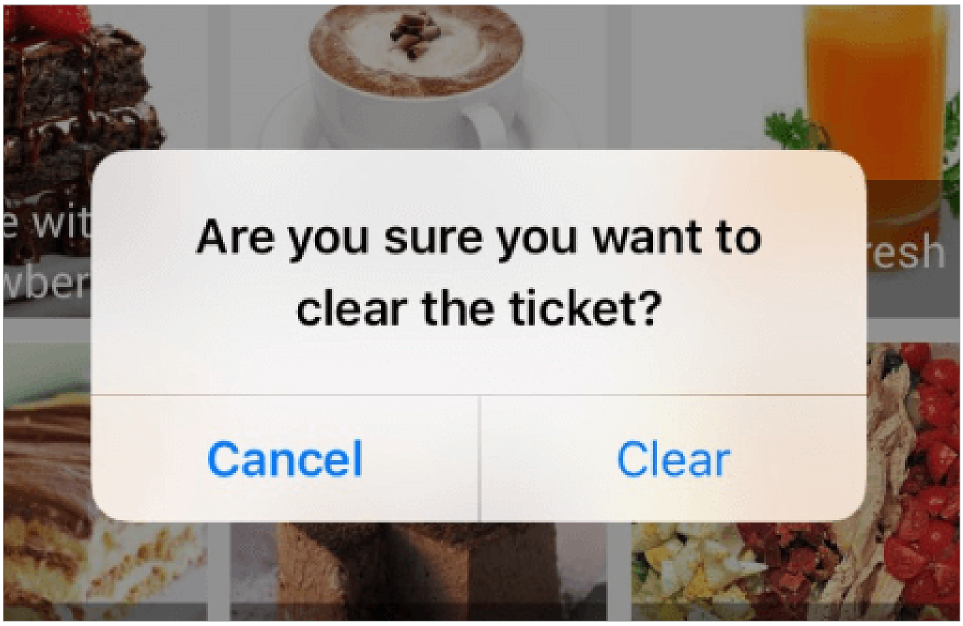


When you need to void a sale, tap the three dots menu (⋮) at the ticket header, then tap 'Clear ticket'.

5

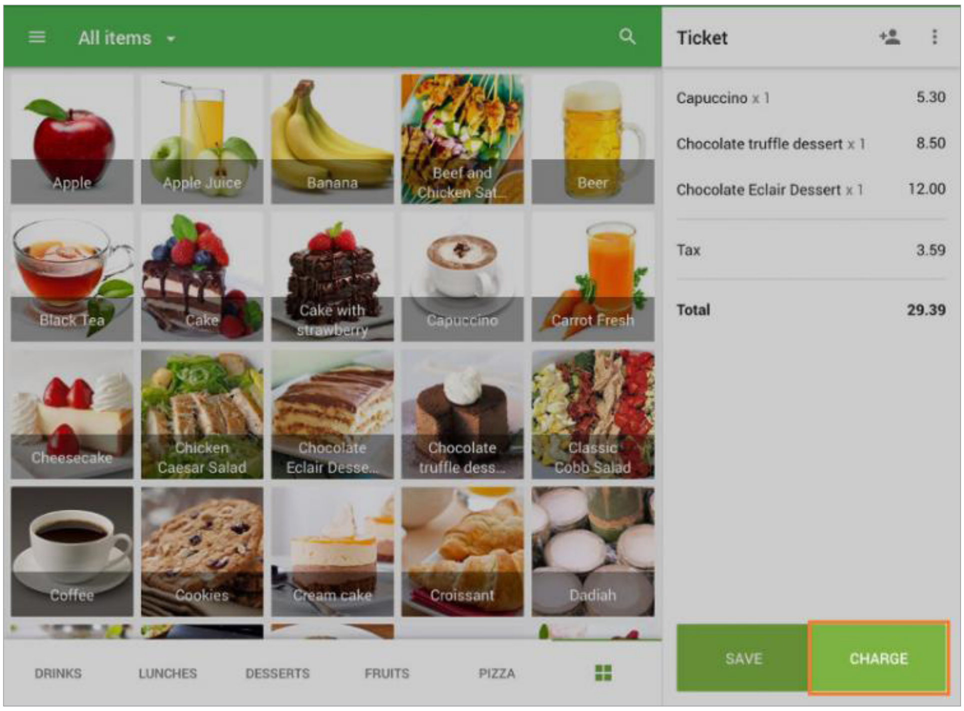


6



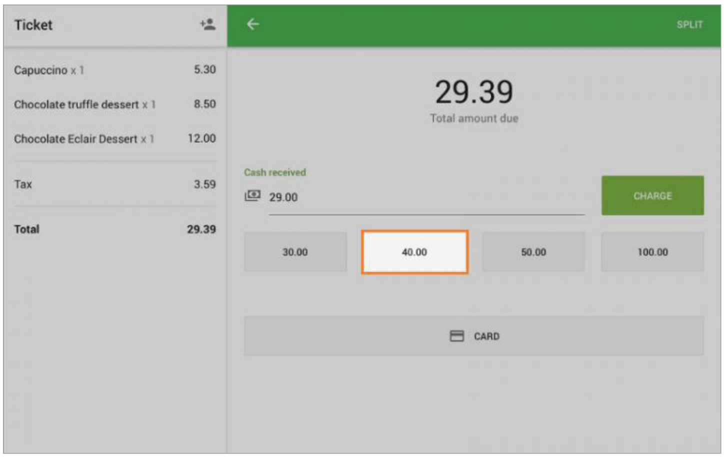
Tap the 'Charge' button in the bottom right-hand corner to proceed to the sale registration.

7



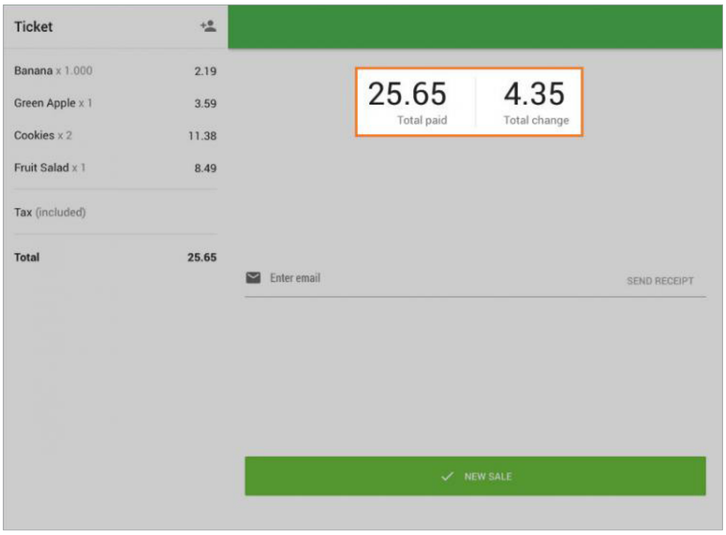
At the following dialog window, you can choose a type of payment for the purchase.
If it is a cash payment, you can tap on the suggested amount.

8



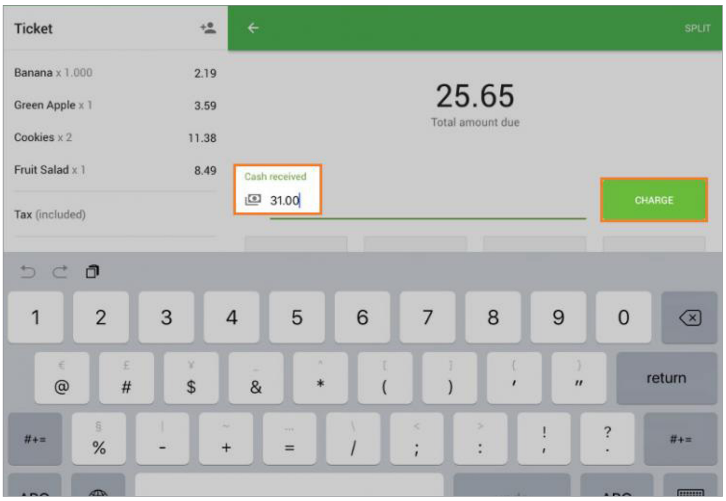
Or if you want to add a custom amount of cash received from the customer, enter the amount in the 'Cash received' and then tap 'Charge'.

9



Once the payment is processed, you will see a window with a summary containing the total amount of sale and the change due.

10



You can choose to email the receipt to your customer or move on to a new sale.

2. Sales

2.1 How to Arrange Sale Screen in Loyverse POS

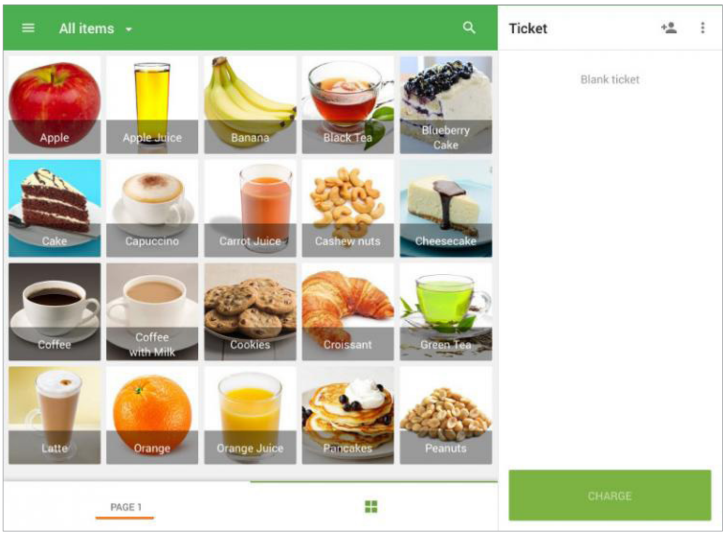
You can arrange your items on the sales screen of Loyverse POS in a suitable way by creating new custom pages and organizing the items there.

As a default, there is a page (marked by the grid icon) with all your items in an alphabetical order. You cannot change this page. However, you can organize the items on the custom pages.

2.1.1 Organizing of Items

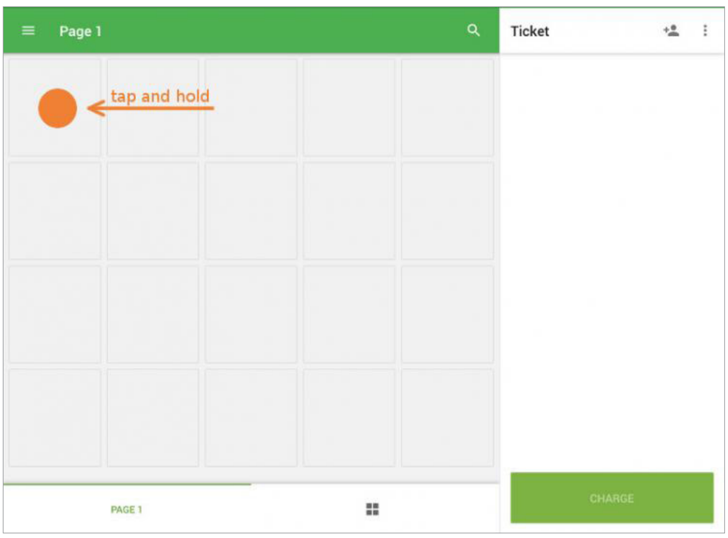
Open the sales screen on your POS. Go to the custom page 'Page 1'.

1



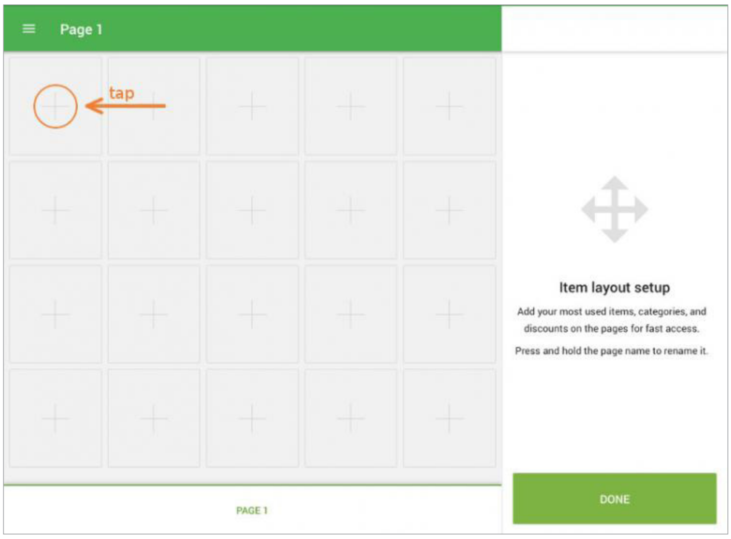
You will see a grid with empty squares. Tap and hold any square for a few seconds.

2



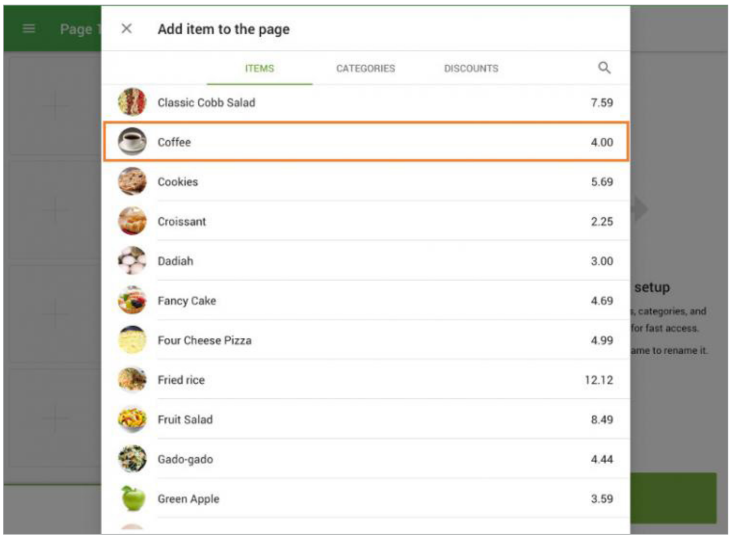
The screen will switch to the 'Item layout setup' mode. Tap any square containing the + sign.

3



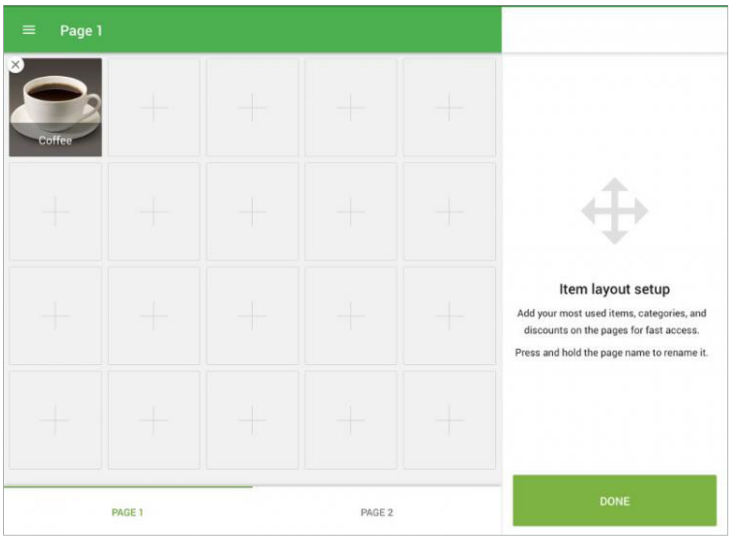
The item list will open in a new screen.

4



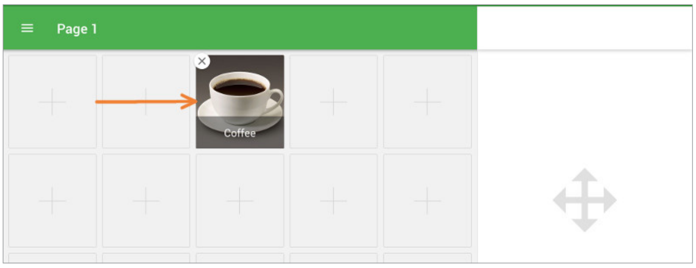
When you choose an item, it will fill the square.

5



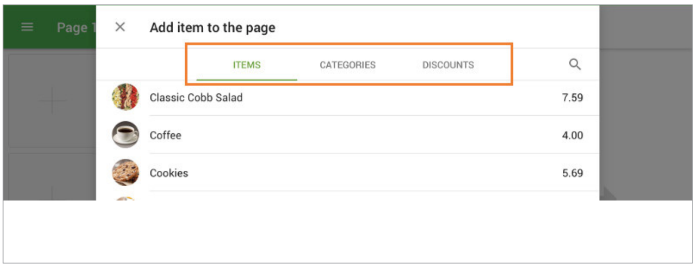
By dragging and dropping the item icon, you can move it to another square.

6



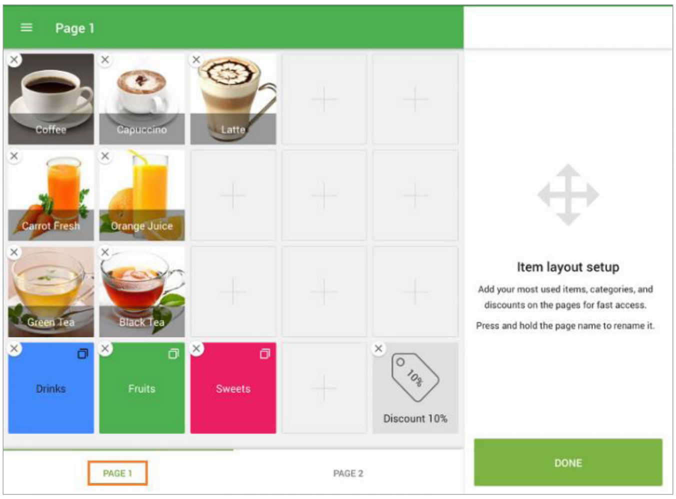
In the same way, you can add Categories and Discounts to the grid page.

7



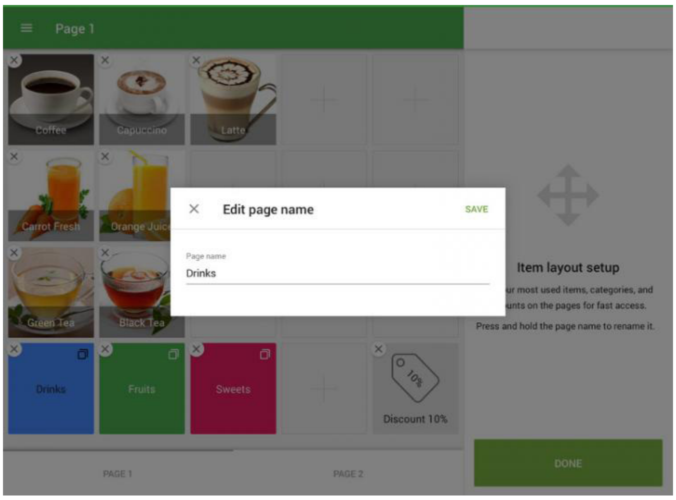
2.1.2 Organizing Pages

1



When you are in the setup mode, you can change the name of the page. Just tap and hold the page label for a few seconds.

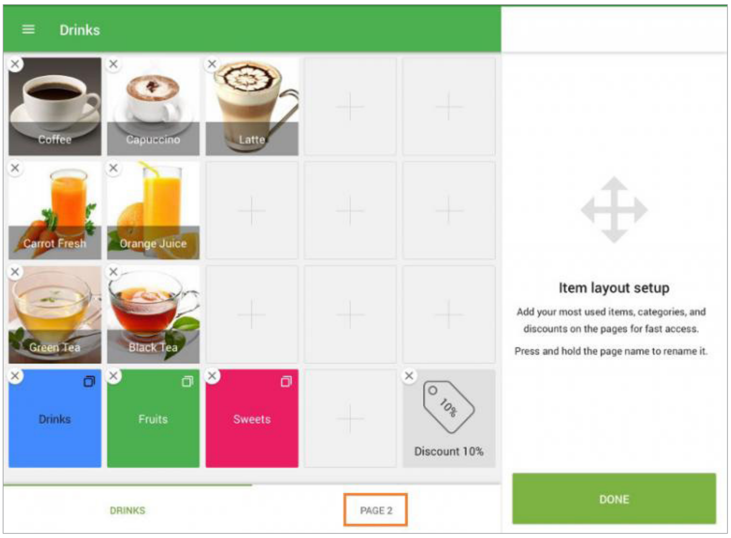
2



The editing screen will open. Fill in the 'Page name' field and tap 'Save'.

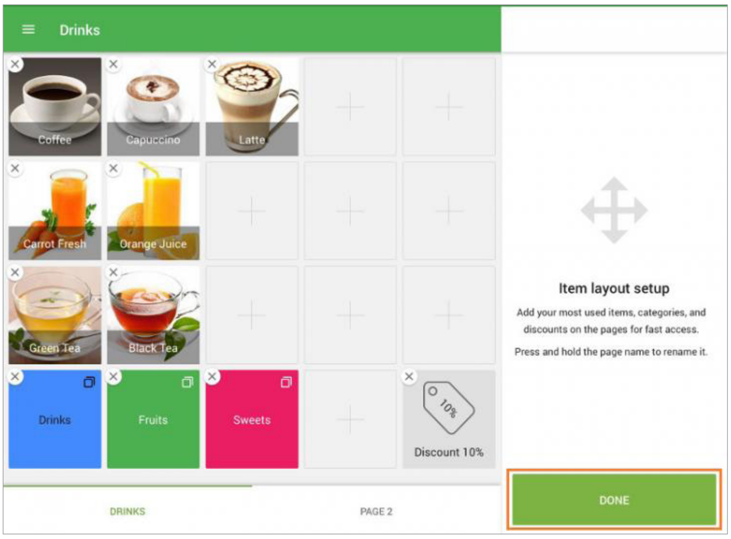
If you want to create another page, you can do it in the same way by tapping the next free page.

3



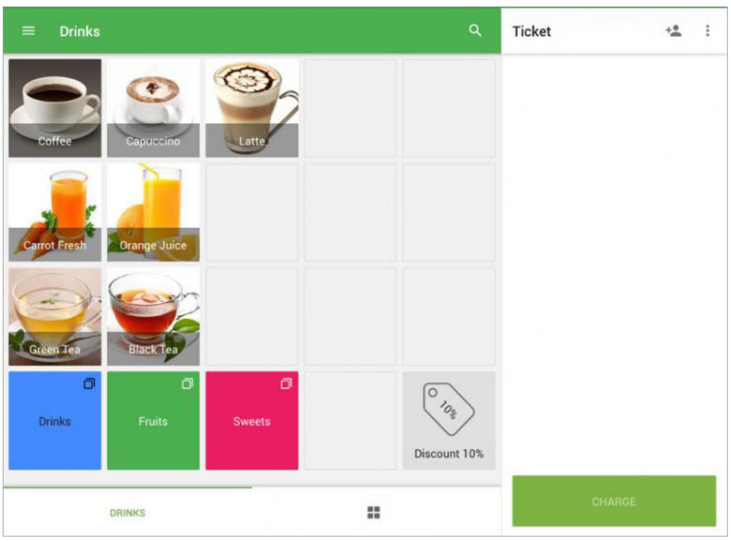
Tap ‘Done’ to save your layout. Pages without items will not be saved.

4



You will then be redirected to the sales screen. Just tap the items to add them to the ticket.

5



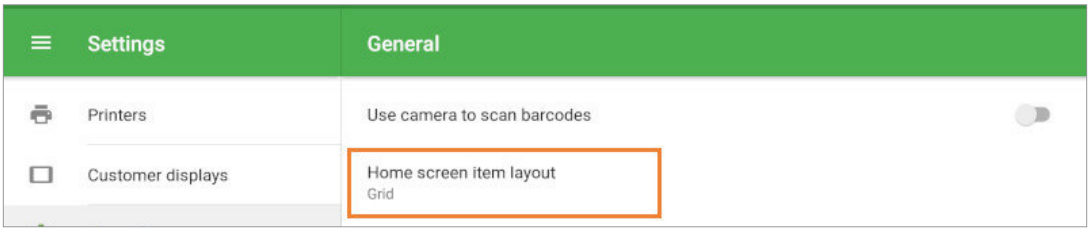
2.2 How to Change Home Sale Screen Layout

You can set your home sale screen layout either in a grid or list format. The feature allows you to find the desired items more conveniently and add them to the receipt.

2.2.1 Sale screen item layout for tablets

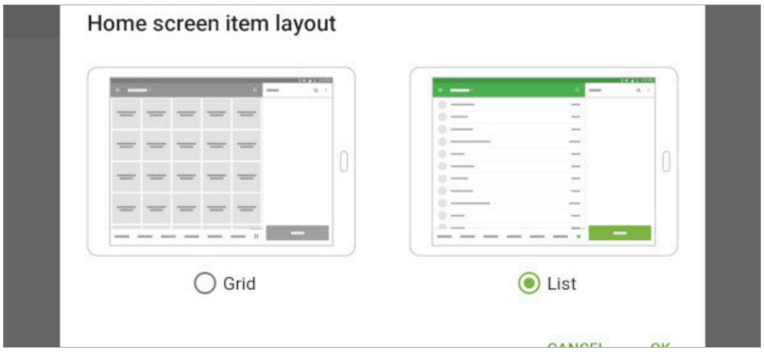
By default, the home sale screen on tablets is set to the grid layout.
To change settings, go to "General" under the application settings and tap 'Home screen item layout'.

1



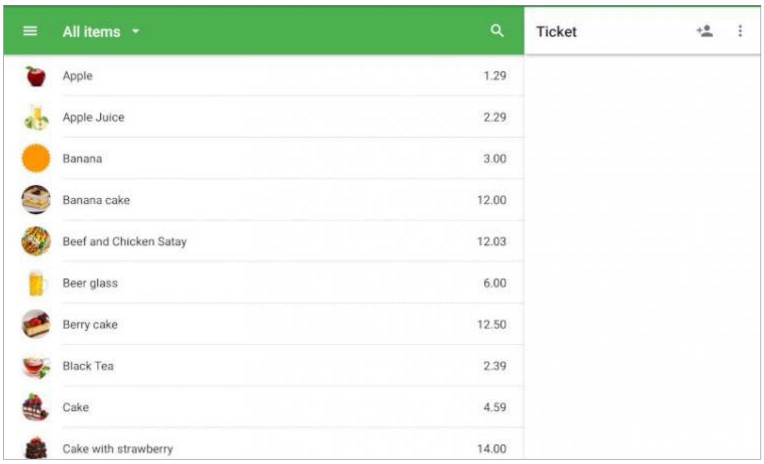
Choose the list option and save changes.

2



In this case, all the items will be listed in one column. This mode is useful when you have long names for your items, or when you want to see the price of the items.

3

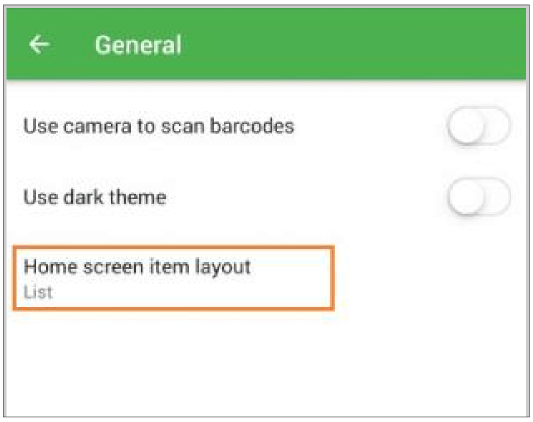


Note

All the customized pages have a grid layout regardless of the settings of the home sale screen.

2.2.2 Sale screen item layout for smartphones

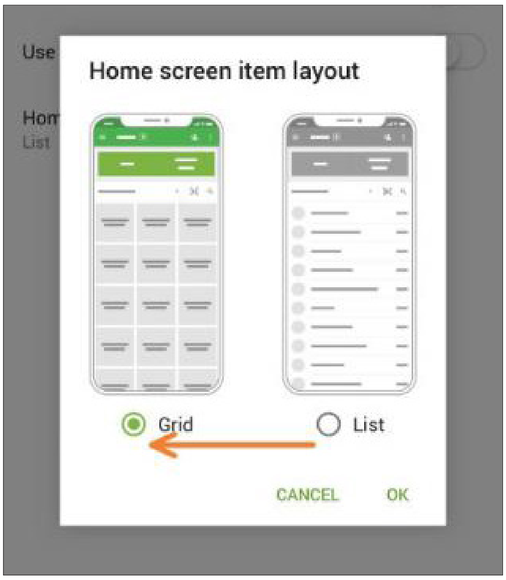
1



By default, the home sale screen on smart-phones is set to the list layout.

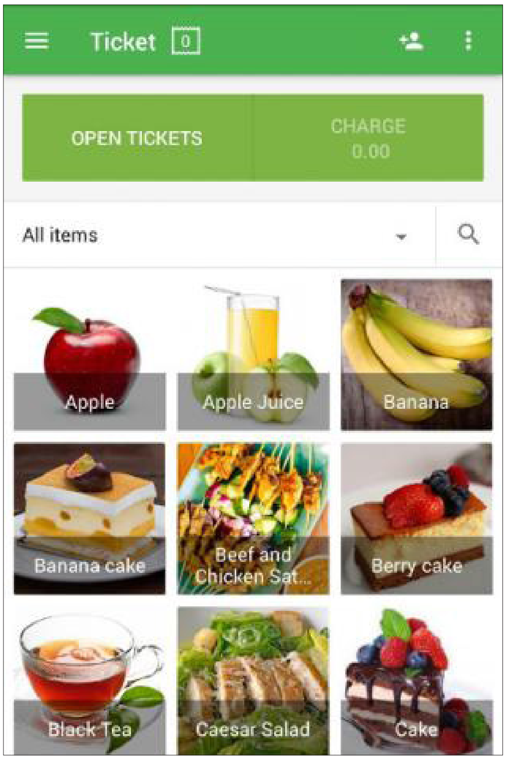
To set your smartphone to the grid layout, go to 'General' under the application settings, and tap 'Home screen item layout'

2



Choose the grid option and save changes.

3



In this case, all the items on the sales screen are displayed in three columns. This mode is useful if you prefer to find items by its image or color.

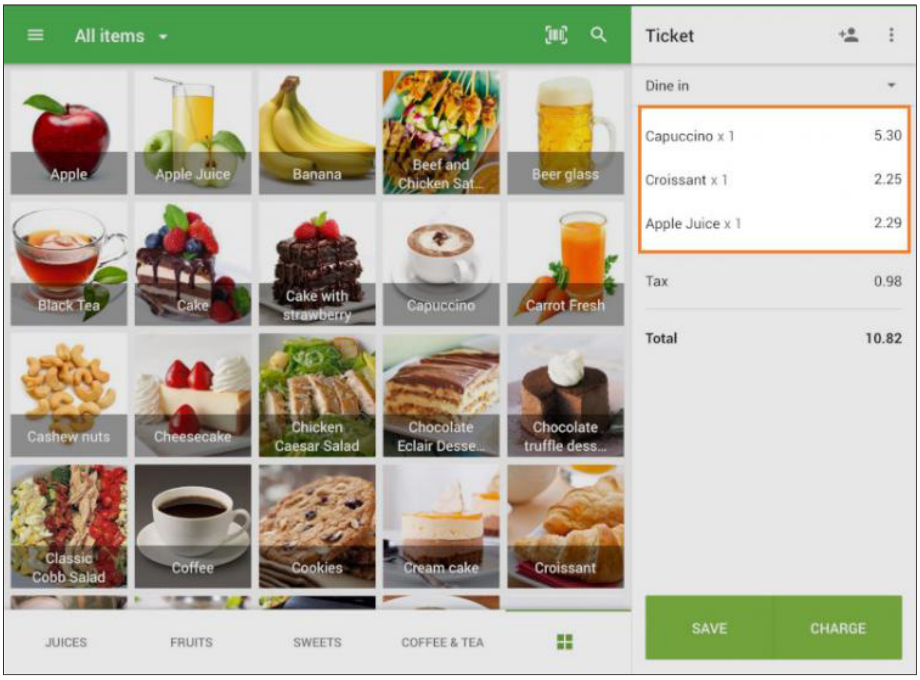
2.3 How to Apply Discounts During a Sale

Before starting to use discounts during a sale, [create and configure] them in the [Back Office] or the mobile app ([Play Market] or [App Store]).

The ‘Percentage’ discounts can be applied to both the whole ticket and separate items. The ‘Amount’ discounts are applicable only to the whole ticket.

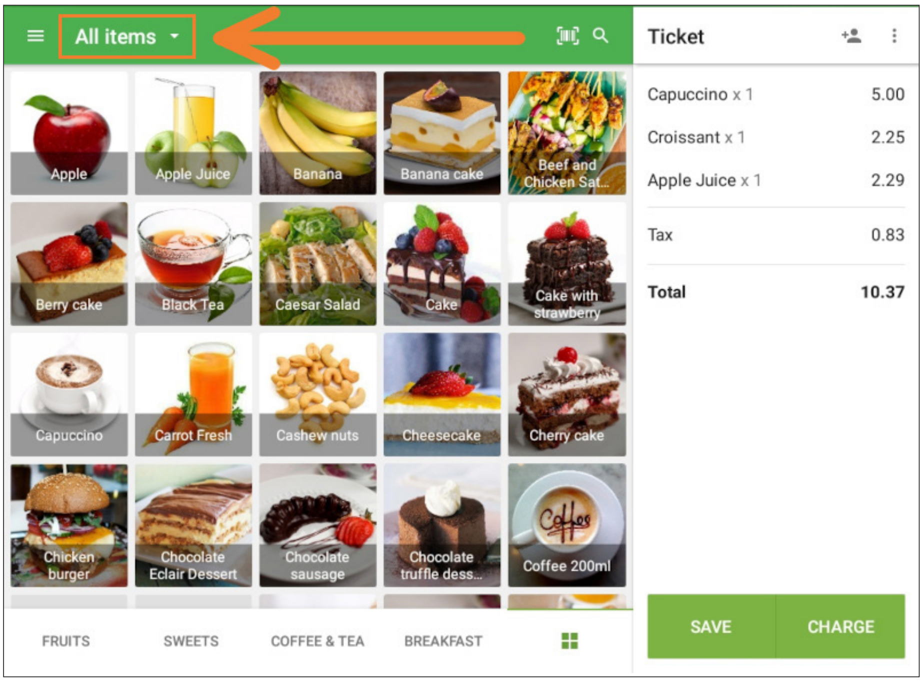
If you want to apply a discount to the whole ticket, first create the ticket by choosing items from the sale screen.

1



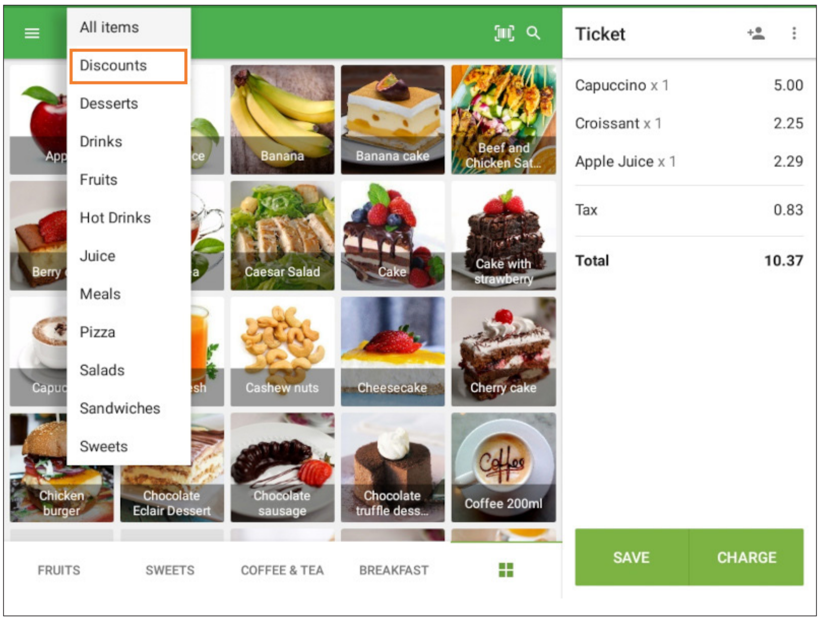
To apply a discount to the ticket, please click on the ‘All items’ line on the top left side of the sale screen.

2



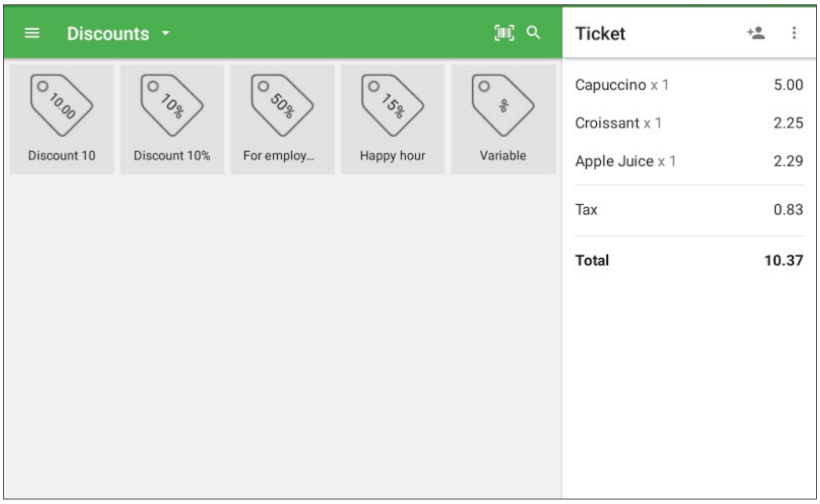
In the drop-down menu, click on the 'Discounts'.

3



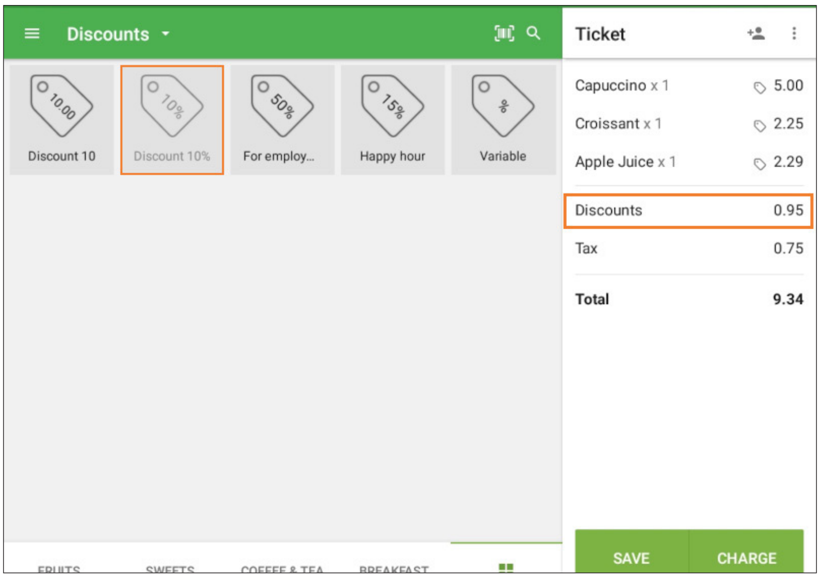
You will see the list of your previously created discounts

4



Tap on the needed discount, and it will automatically be applied to the whole ticket.

5



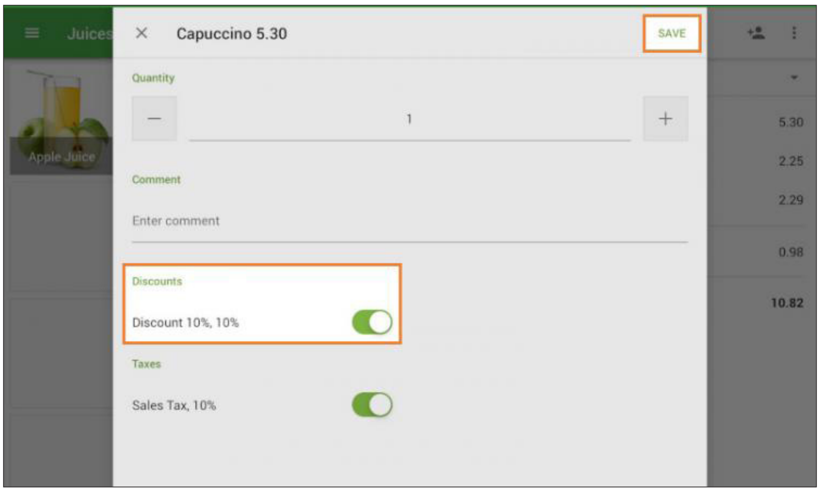
If you want to cancel it, tap the “Discount” line on the ticket. In the opened window, tap the trash icon.

6

In order to apply a discount to a specific item, tap the item in the current ticket.

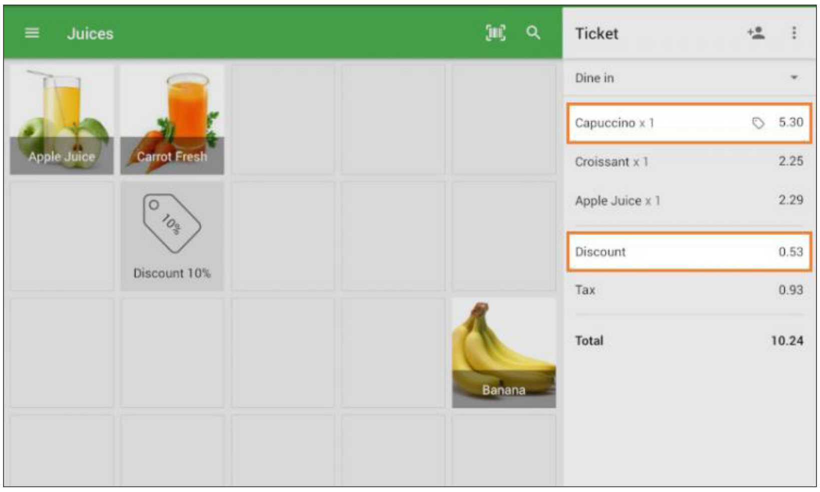
The window to edit items in the ticket will open. In the discounts section, you will see the available discounts. Switch on the desired one, and save changes by tapping the ‘Save’ button.

7



Afterward, the discount with its value will appear on the ticket, and the discount sign will appear next to the item.

8



Now, you can continue the finalization of the sale as usual.

Note

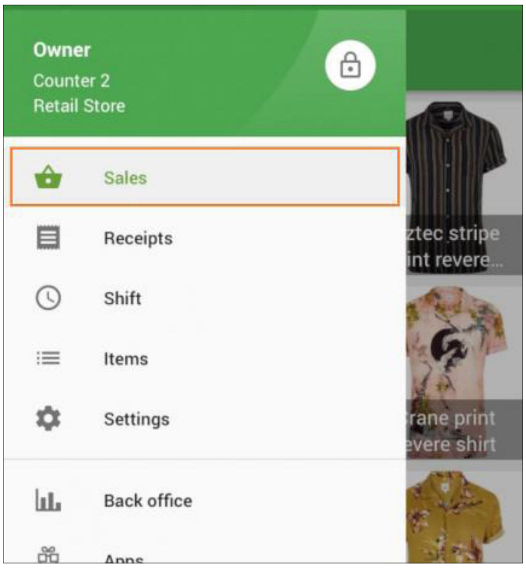
In case of applying multiple discounts (percentage, amount, and customer points), the system will automatically apply them in the order of lower to higher discount value.

2.4 How to Sell Items Using Barcode Scanners

Barcode scanners can be used with Loyverse POS to quickly add items to a ticket. Before making sales, make sure that your scanner is paired with Loyverse POS and the items have barcodes.

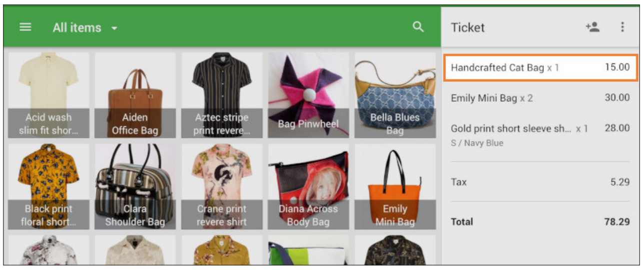
Launch your Loyverse POS app (Android, iOS) and go to the Sales screen, in the same way as when selling without a scanner.

1



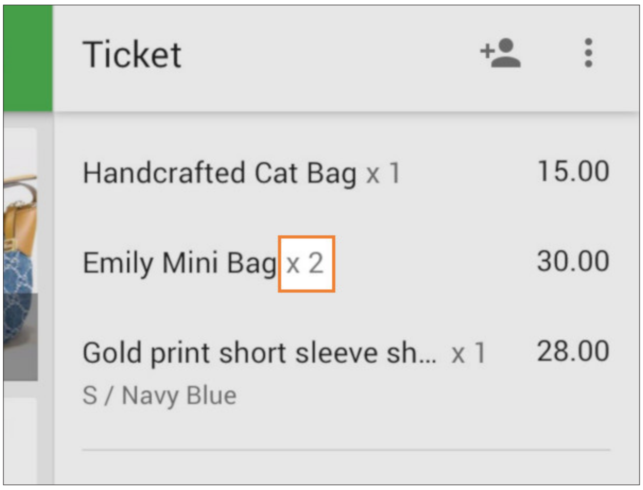
When you scan your item's barcode with a scanner, this item will appear in your ticket.

2



If you scan the same barcode one more time, the number of items will increase by one.

3

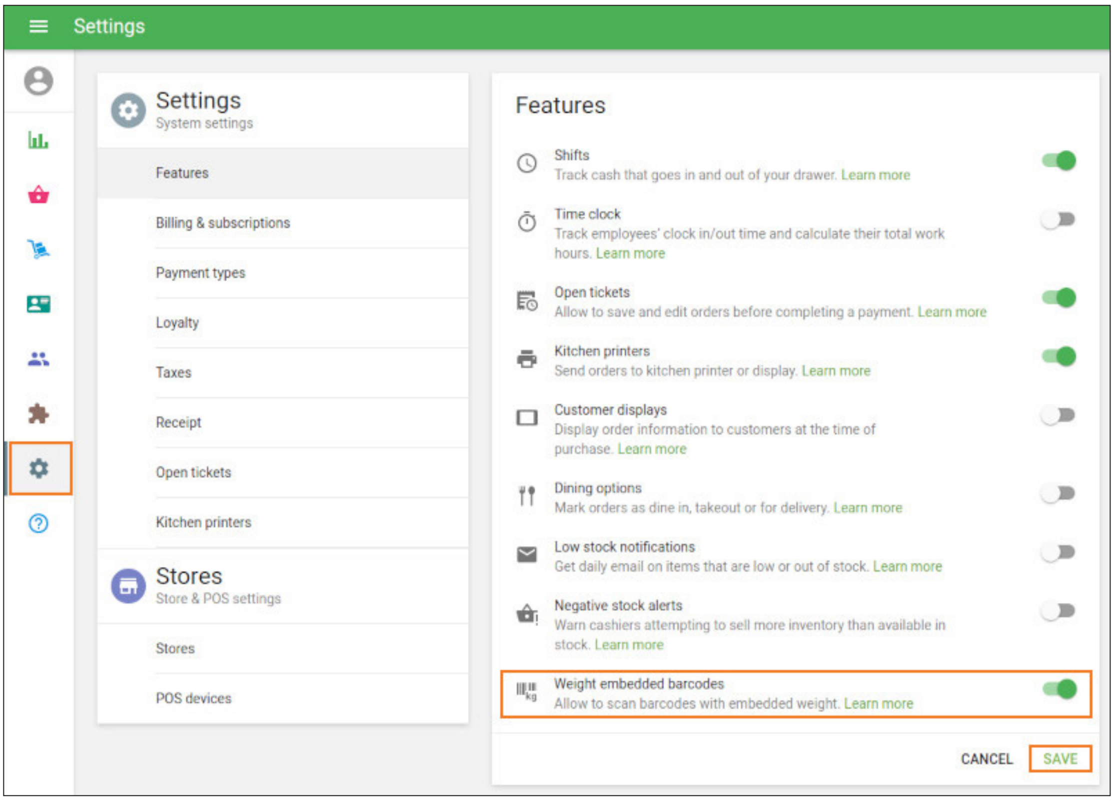


2.5 How to Scan Barcodes with Embedded Weight

The option allows you to scan barcodes containing the item SKU and its weight. When scanning such a barcode, the item is automatically added to the receipt with the indicated weight (quantity). The system allows the use of weighted barcodes in the following formats: EAN 13 and UPC-A.

To use this feature, log in to your Back Office, click on the Settings icon on the left menu bar to go to the System settings.
In the 'Features' section, switch on the parameter for 'Barcodes with embedded weight'. Click the 'Save' button.

1



At your POS, you can sell items by scan barcodes with embedded weight using the device camera or barcode scanner.

Barcodes with embedded weight format should follow the pattern:
YYCCCCCWWWWWX
YY - prefix, by which the system determines that it is a weight embedded barcode. It must be "20" or "02" for EAN 13 and "2" for UPC-A.
CCCCC - item SKU (note that it has to be programmed as five digits, for example "10010" or "00010").
WWWWW - weight (quantity) of item in grams. For example "01750" = 1.750kg
X - barcode checksum

Samples of barcodes with embedded weight

EAN 13

2

2 010012 017505

SKU Weight

UPC-A

3

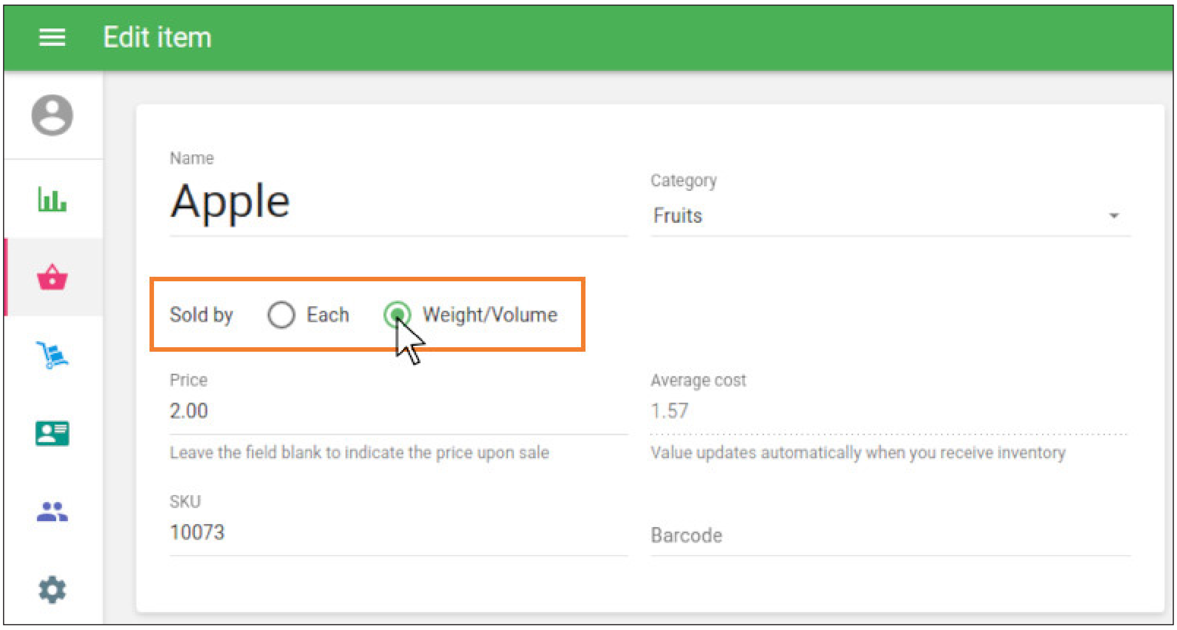
2 10012 01750 1

SKU Weight

Note

Items should have the ['sold by weight' option]() on. Otherwise, you will receive an error message when scanning barcodes with embedded weight.

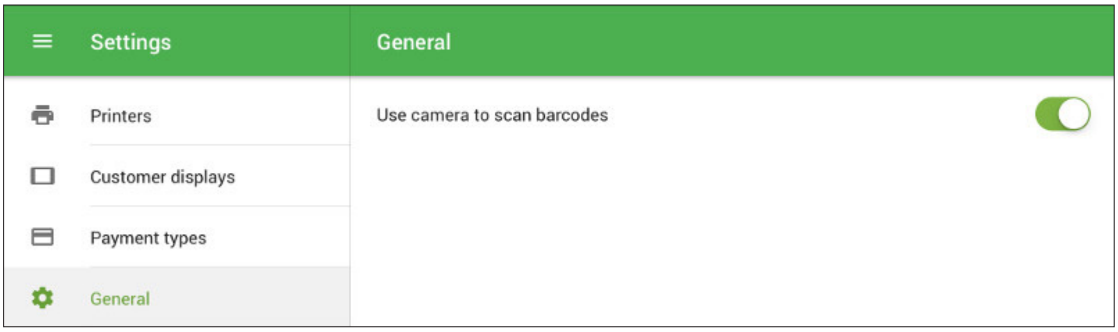
4



2.6 Barcodes Scanning by Built-in Device Camera

The built-in rear camera of Mobile Device can be used to scan item barcodes during sale or when adding new items to the list.
First, you have to activate the option ‘Use the camera to scan barcodes’ on Loyverse POS app in the General Settings.

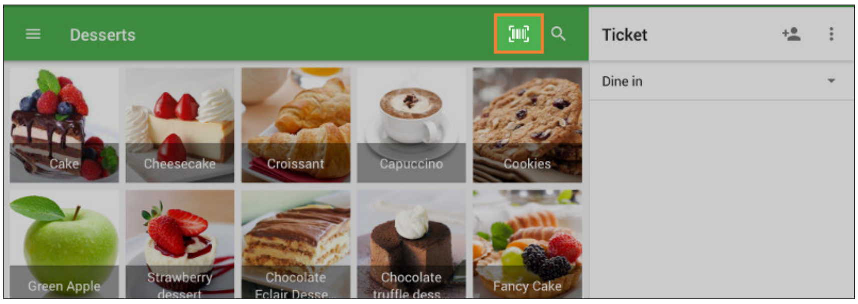
1



2.6.1 Selling Items

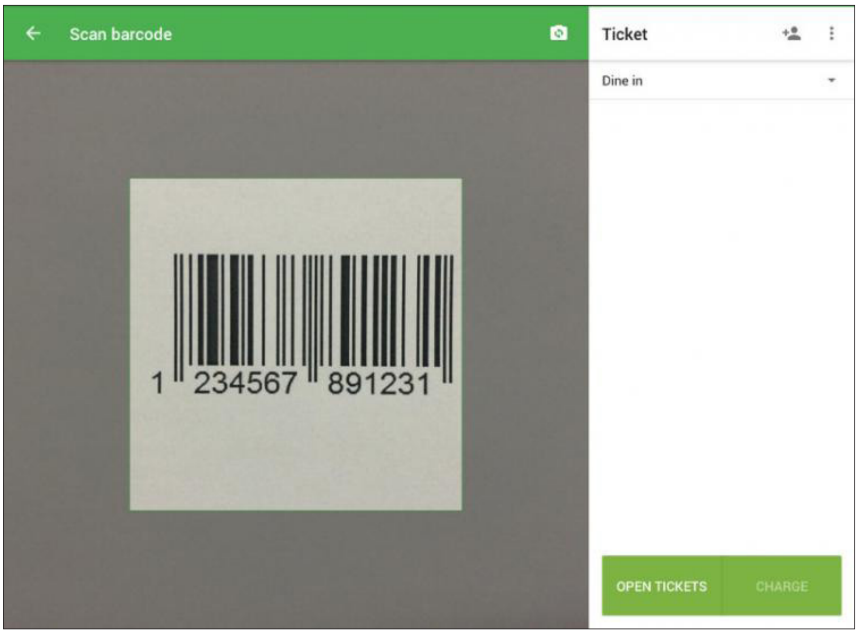
Before making sales, make sure that you have barcodes on the item’s card.
Launch your Loyverse POS app and go to the Sales screen, same as when selling without a scanner.Tap the button for scanning barcodes with the built-in camera.

1



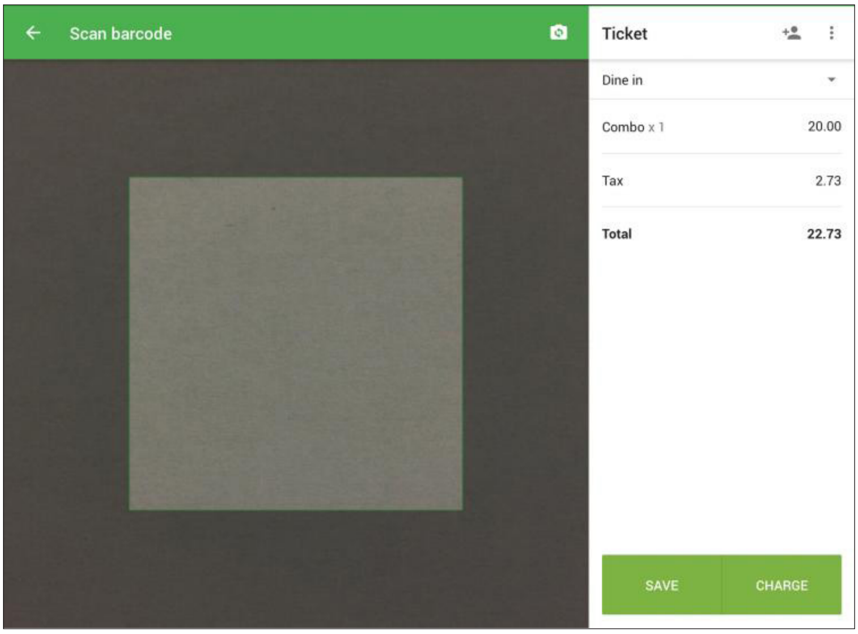
Point the camera at the barcode of your item.

2



The camera will scan the barcode and the item will appear on the ticket list.

3

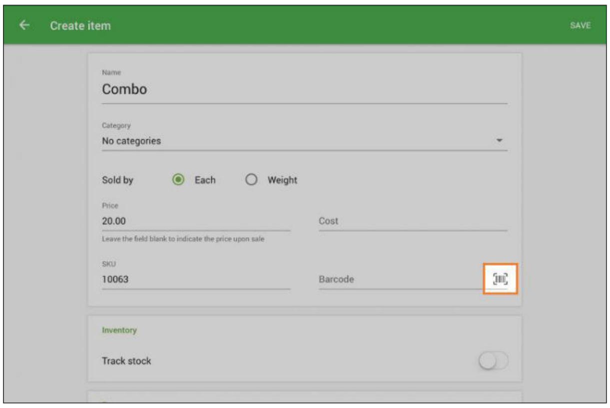


The screen with the camera will remain open, so you can scan another barcode, or edit items in the ticket, search for a client to add to the ticket, redeem customers points, save or merge open tickets.

2.6.2 Adding Barcodes to Items

In the Loyverse POS ‘Items’ menu, open the item for editing and tap the scan button near the Barcode field.

1

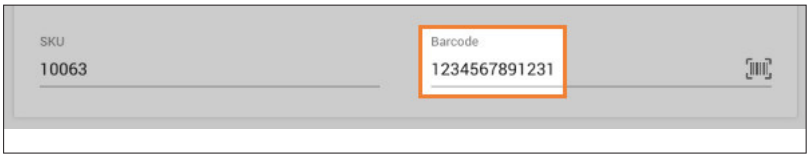


2

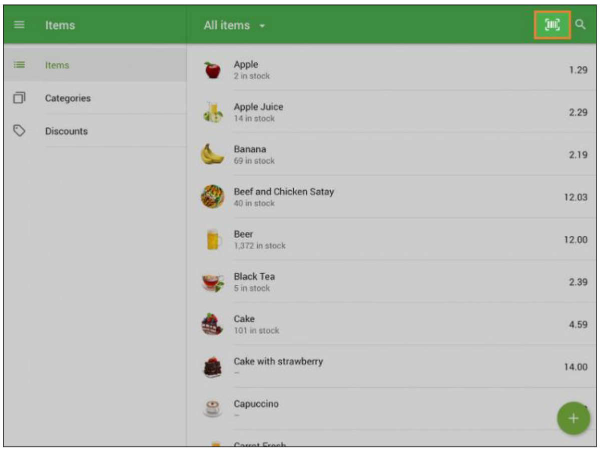
The screen with the camera will be activated, so point the camera at the barcode.

Once it is scanned, it will fill in the barcode number in the Barcode field.

3



4



Don't forget to save changes.

You can also activate the built-in camera from the Items list.

The screen with the camera will be activated, so point the camera at the barcode.
If any item does not have this barcode, the new item will be created and opened for editing with the filled-in barcode. If there is already an item with this barcode, it will open for editing.

Note

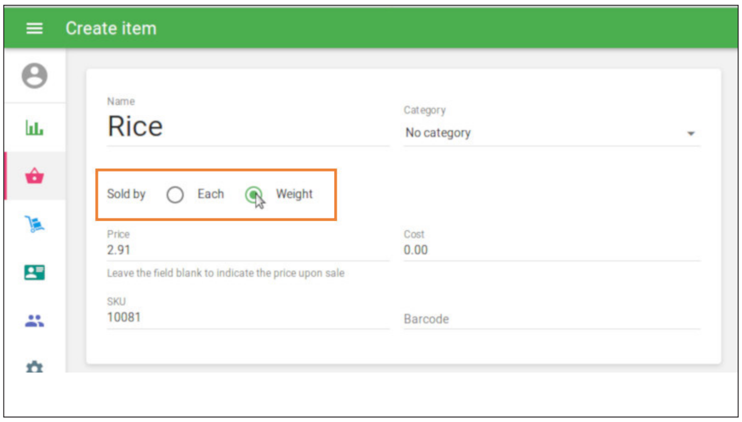
Loyverse POS with built-in camera can scan UPC-A, UPC-E, EAN-13, EAN-8, Code 39, Code 93, Code 128 barcodes and QR code as well.

2.7 How to Sell Items by Weight

Whether an item is sold by piece (bottle, pack, etc.) or by weight (pound, kilogram, etc.) is determined by the 'Sold by' option found in the item description. You can change this option both in the Back Office and the Loyverse POS app.

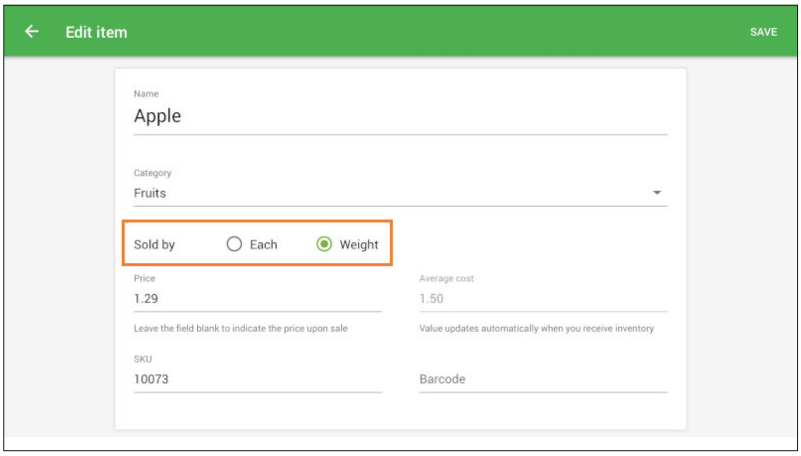
If you want to change the option from the Back Office, first log in to the Back Office, go to 'Item list', and open the existing item to edit or create a new item.

1



If you want to change the option from the Loyverse POS app, go to 'Items' section and tap the existing item to edit or create a new item.

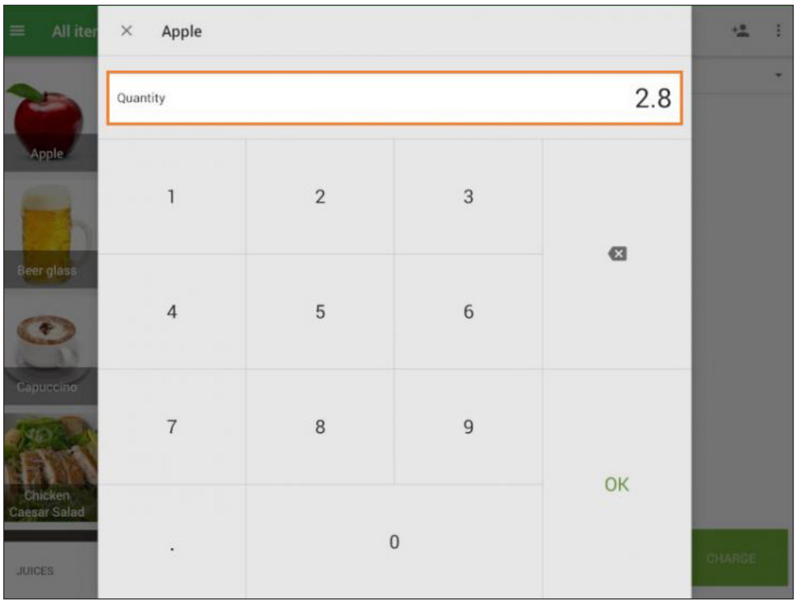
2



In both cases, set the 'Sold by' option to 'Weight'. Enter the item price per one unit of weight, such as kilogram, pound, etc. Save your edits.

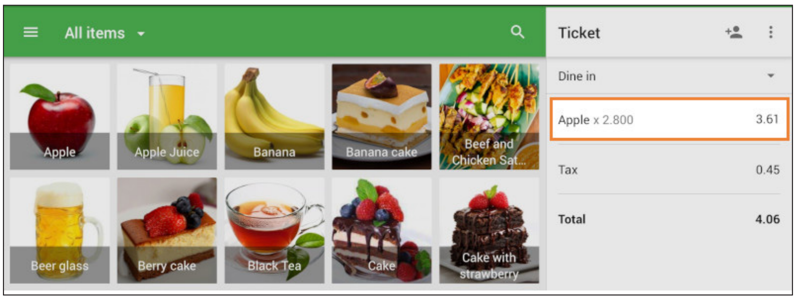
When you sell the item, a number pad will appear on the screen. Enter the actual weight of the item and tap 'OK'.

3



The item will be added to the ticket with the price for a unit of weight multiplied by the actual weight.

4



2.8 How to sell liquids

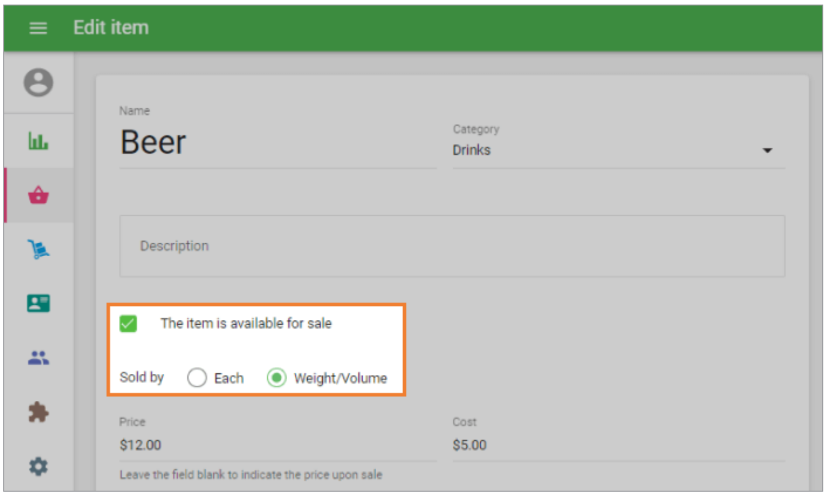
There are two approaches to sell liquids with Loyverse POS.

2.8.1 Through selling by weight option

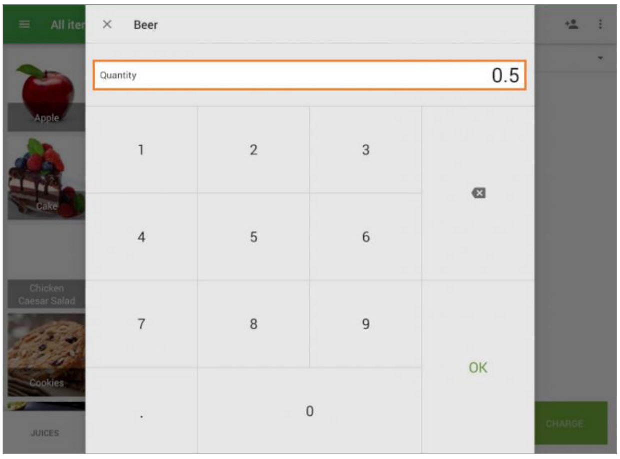
Open your liquid item for editing in the Back Office or Loyverse POS app. Assign the ‘Sold by’ option to ‘Weight’ (How to Sell Items by Weight).

Enter the item price per one liquid measure, for example per one liter (you may indicate the measure in the name of the item, for instance, ‘Beer 1L’). Save your edits.

1



2

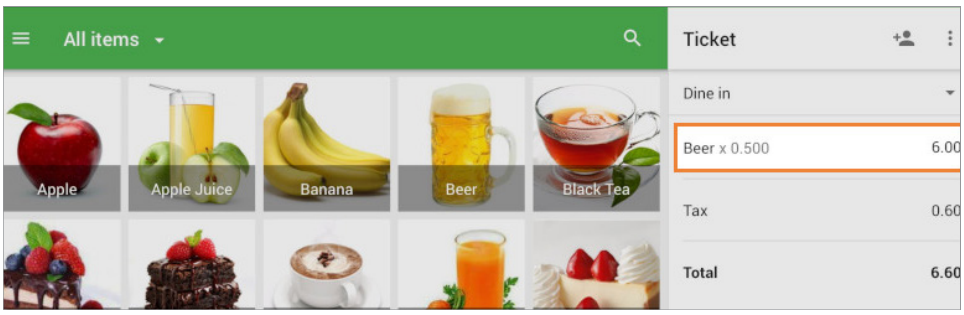


Now, during a sale of such item, a number pad will appear on the screen. Enter the amount in proportion to a liter for the item and tap ‘OK’.

For example, you sell 500 ml of the liquid item, and your measure is a liter. Then you tap 0.5 in the Quantity field.

Then, your item will be added to the ticket with the price shown as the price for a liter multiplied by the actual selling portion. The sold amount will be deducted from the stock for this liquid item.

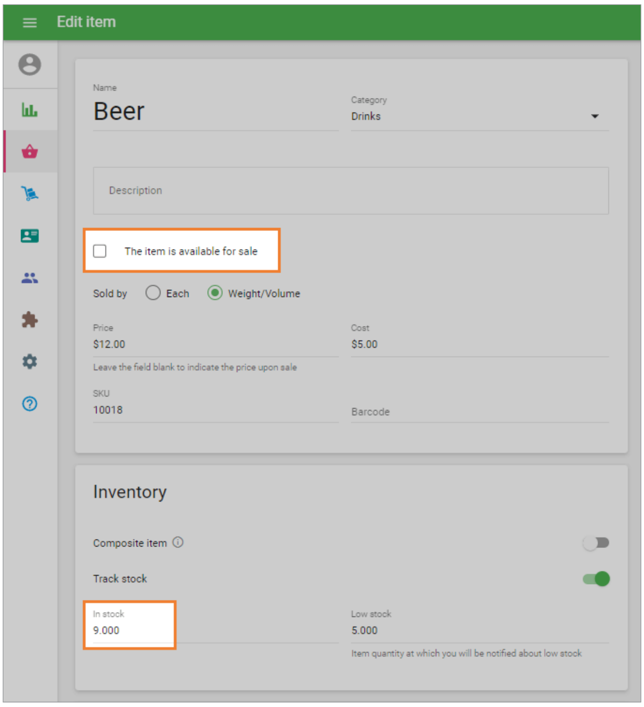
3



2.8.2 Selling like composite item

If you sell by a particular set of liquid volumes (for example, drinks in shots or pints), you can use composite items.

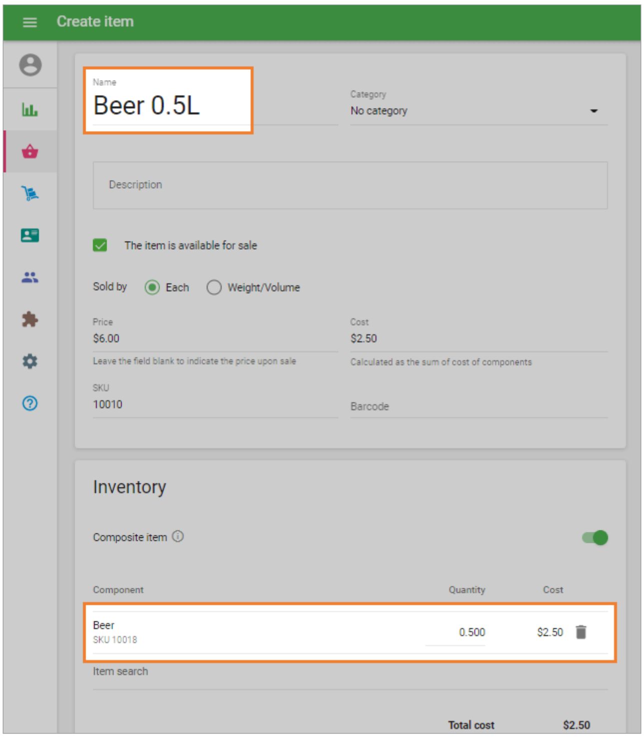
1



First, create the component of your liquid item in the 'Item list', and set the amount of stock.

If you don't want to sell this component besides as predefined sets of volumes, deselect the check-box 'The item is available for sale' so that it will not be shown in the items list during sales.

2



Then create your set of liquid volumes from this component item. Each composite item should have the quantity field filled in with the liquid volume.

For example, you are selling Beer by a volume of 500 ml. Create a composite item "Beer 0.5 L". Choose the component 'Beer', and set the appropriate quantity. In this case, it is 0.5 L.

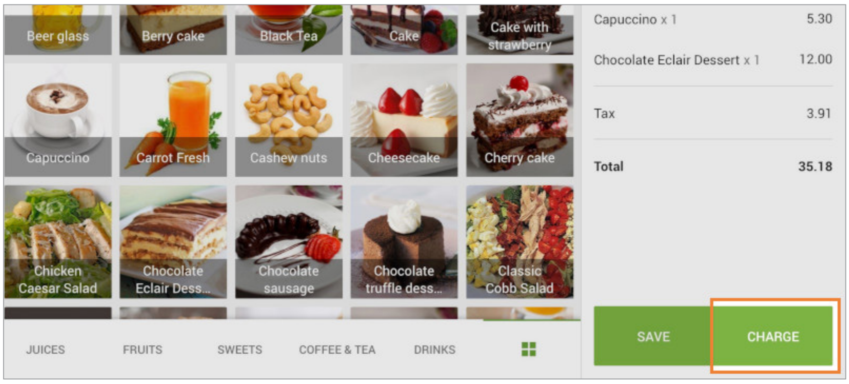
Then, with every sale of predefined sets of volume items, the stock of the component of the liquid item will be deducted by the sold amount.

2.9 How to Split Payment with Loyverse POS

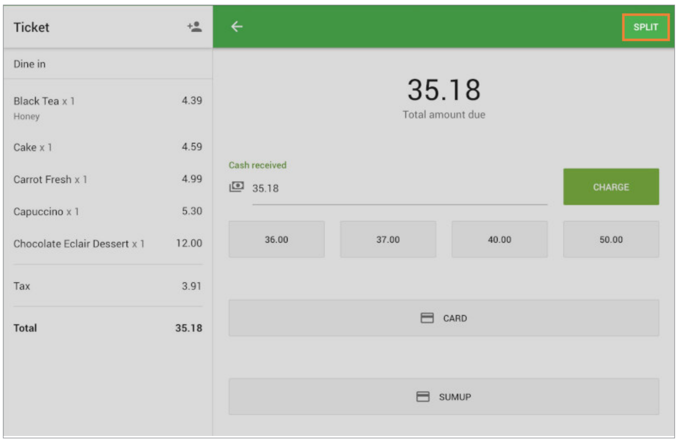
Sometimes, customers ask to split the total of the ticket into several partial payments. It is also possible to select a different payment type for each partial payment.

After adding items to the ticket, tap 'Charge'.

1

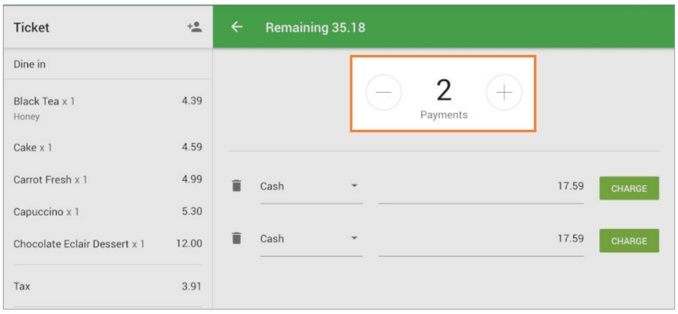


2



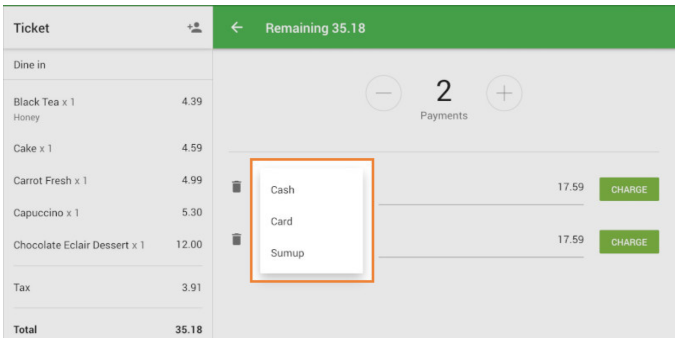
In the payment window, tap 'Split'.

3



Use '+' or '-' buttons to set up the number of partial payments.

4

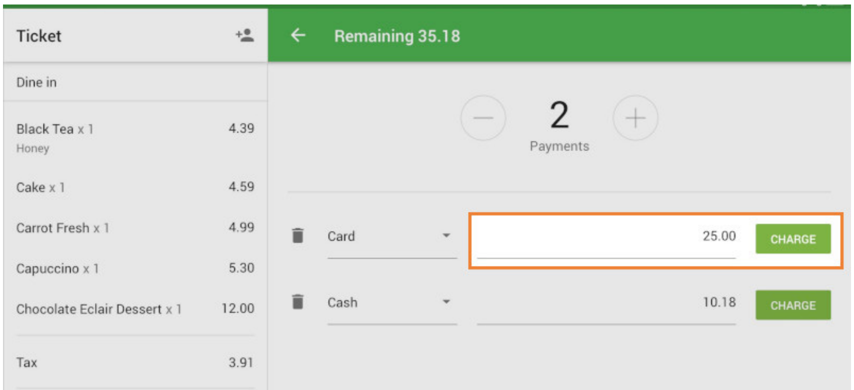


By default, the entire amount will be split evenly.

Select the payment type for each payment.

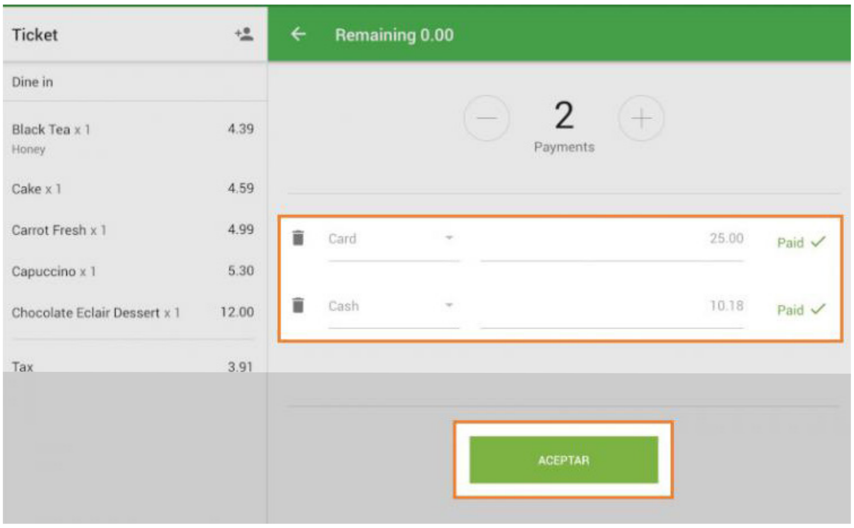
If you need, enter a custom amount for each partial payment and accept the payments by tapping the 'Charge' button.

5



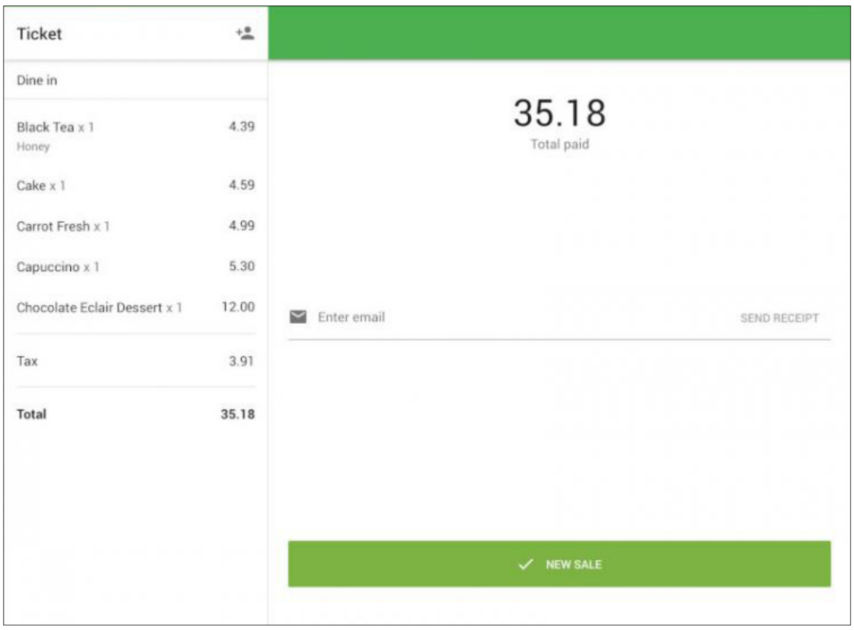
After charging, you can see that each payment has the word 'Paid' next to it.
Then tap 'Done' to finalize the transaction.

6



You will also get separate receipts for each payment.
Tap the 'New sale' button to go to the sell screen.

7



2.10 Open Tickets

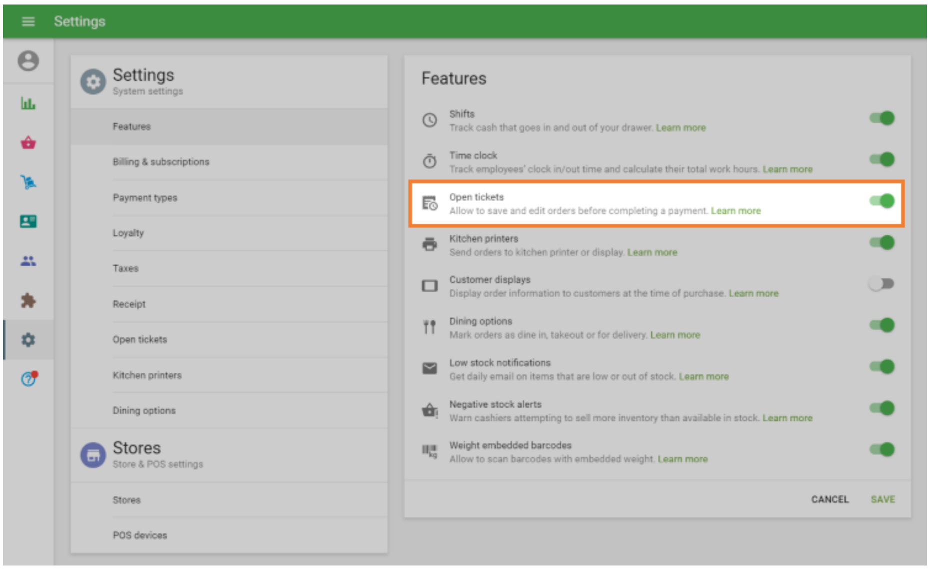
'Open tickets' allow you to create, edit, and save an order, before completing a sale. This feature is usually used in cafes and restaurants, where the order and payment may be separate over an extended period of time.

'Open tickets' helps you to work with few orders simultaneously, edit, and close them during payment.

2.10.1 Settings

In the Back Office, go to the 'Settings' menu, Features section, and activate the mode 'Open tickets'. Do not forget to save your changes.

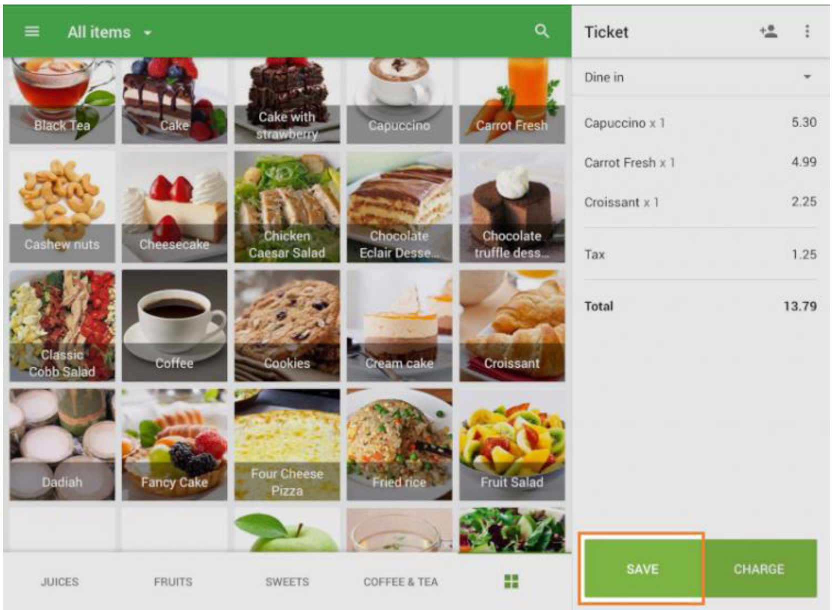
1



2.10.2 Open ticket creation

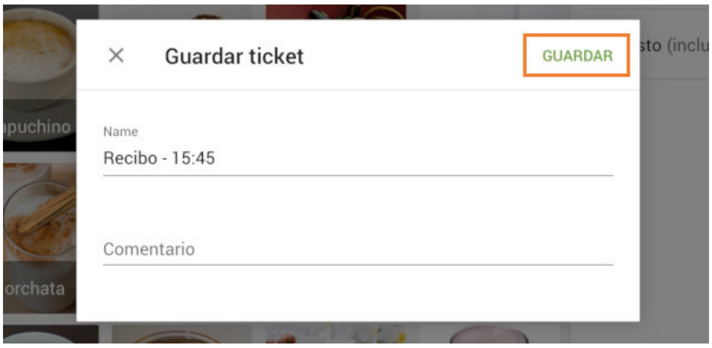
Once you have formed a ticket when selling through the mobile application, click on the 'Save' button.

1



In the opened window, you can edit the name of the ticket (it will be generated automatically with reference to the current time) and add a comment to it. Click the 'Save' button to save the ticket.

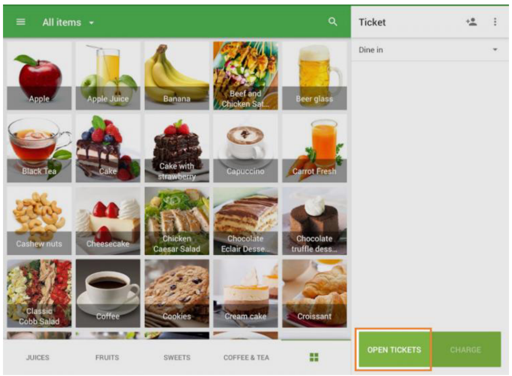
2



If you have the predefined ticket functionality on, you have to select one from the predefined ticket list. Afterward, the column with the ticket becomes clear, and you can work with other clients.

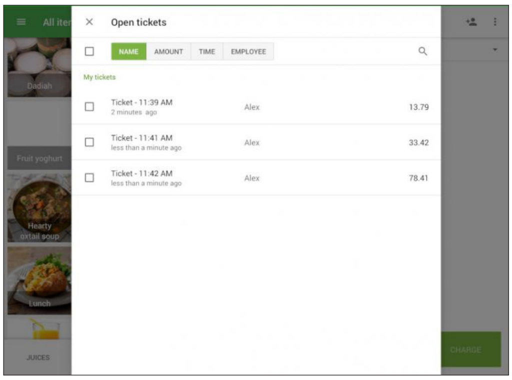
2.10.3 Searching and editing

1



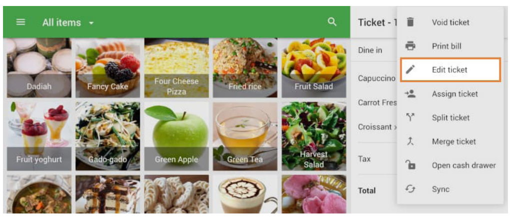
To edit or close the open ticket, click on the button 'Open tickets'.

2



In this menu, you will find the open tickets list, which can be sorted by name, amount, last modification time, and employees. If the ticket list is long, use the search bar.

3



To edit or close the ticket, find it in the list and click on it. Edit or close the ticket, then click 'Save' or 'Charge'.

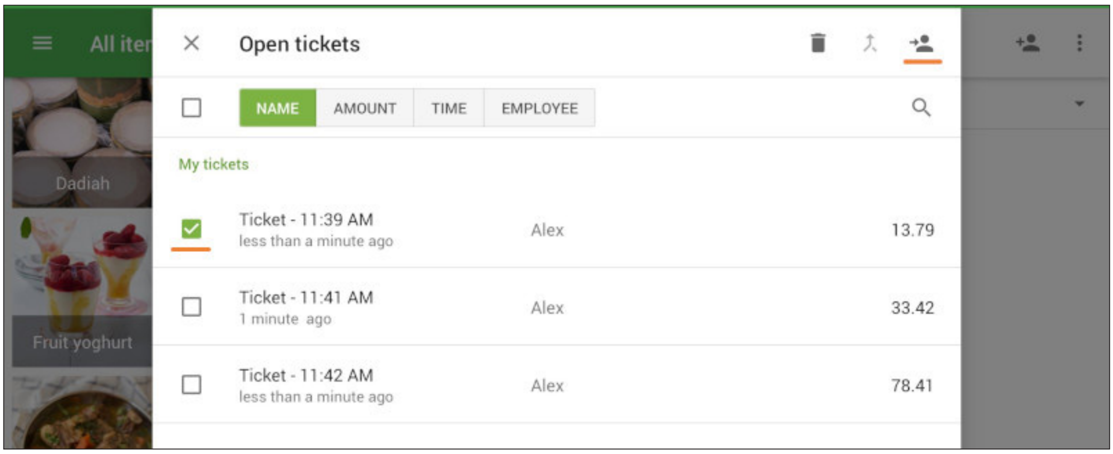
If you need to edit the name of the ticket or the comment attached to it, tap 'Edit ticket' in the three-dot menu.

2.10.4 Assigning and Removal

Employees whose ‘Manage all open tickets’ function is enabled can assign their tickets to each other.

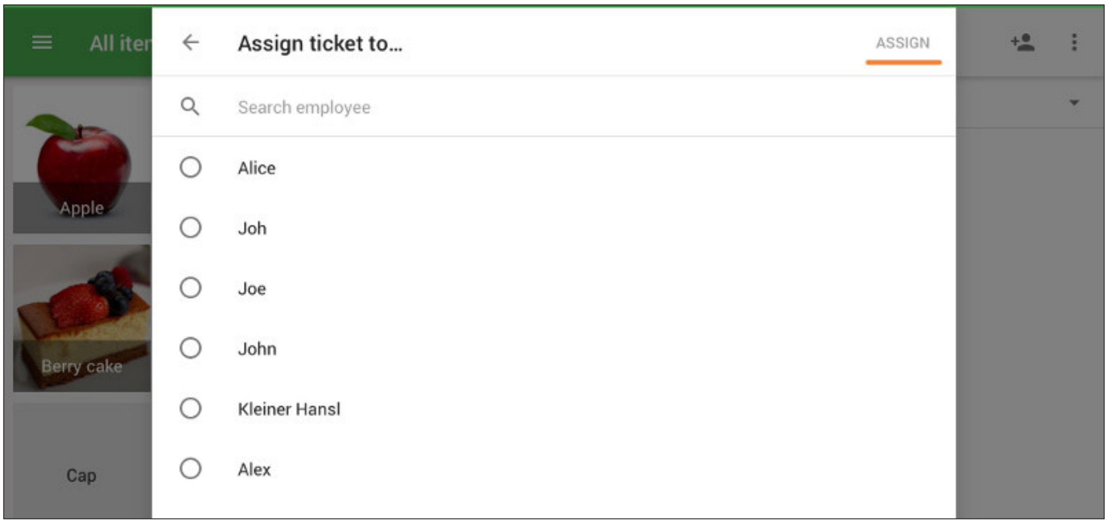
In the open ticket list, check the necessary tickets and tap the icon at the upper right-hand corner of the screen.

1



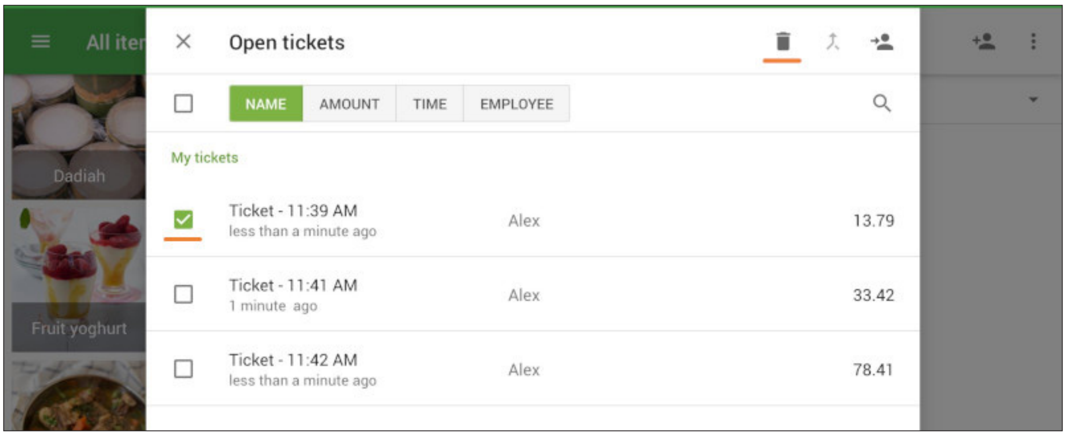
Through search, choose the employee and click the ‘Assign’ button.

2

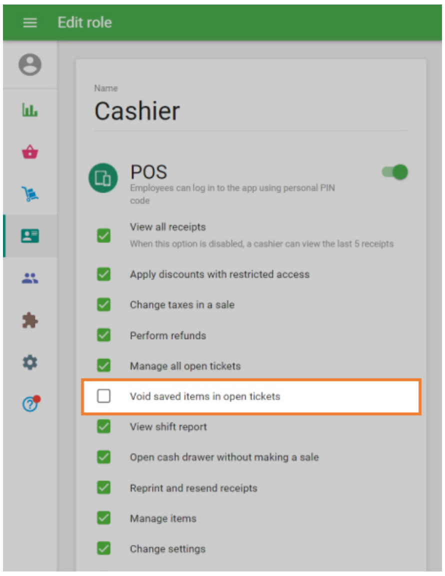


To remove the ticket, select it and click the trash can icon.

3



4



If you want to forbid your cashiers from deleting saved open tickets or deleting items from them, you can restrict their access rights. To do this, go to the 'Access rights' menu in the Back Office and open the 'Cashier' user group for editing. Deselect 'Void saved items in open tickets' option.

Don't forget to save changes.

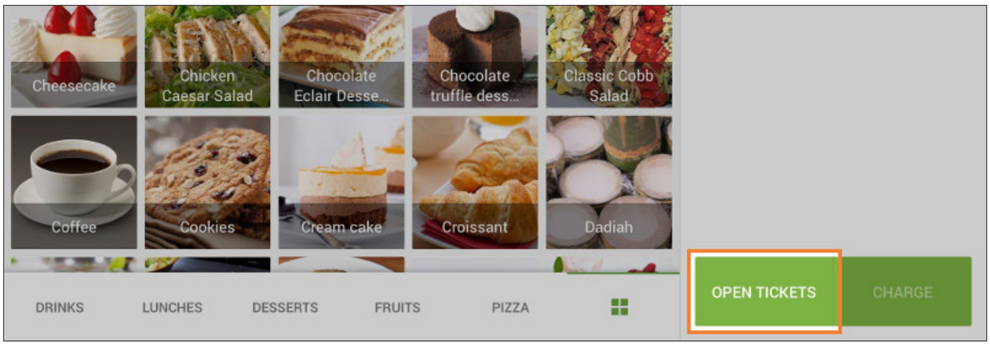
2.11 How to Merge Open Tickets with Loyverse POS

Merging tickets allow the cashier to combine items into one ticket. Please make sure that the open ticket option is activated in the Back Office.

2.11.1 Merging tickets in the open tickets list.

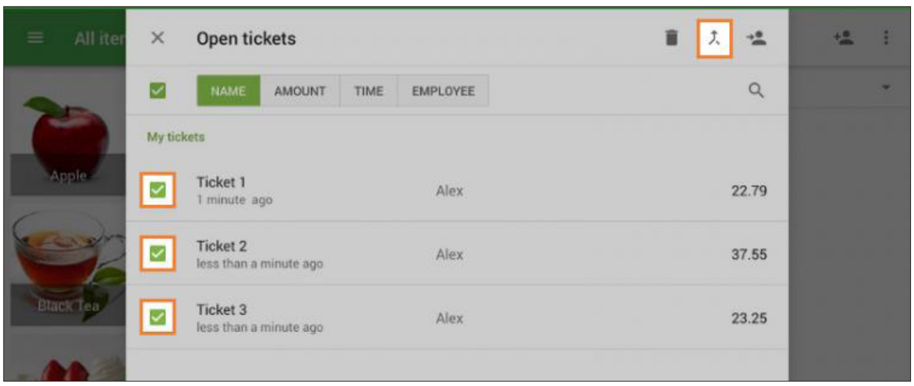
Go to open tickets list from the sale screen by clicking 'Open tickets'.

1



Mark the checkbox of the tickets you would like to merge, and then select the 'Merge' icon at the top right-hand corner.

2

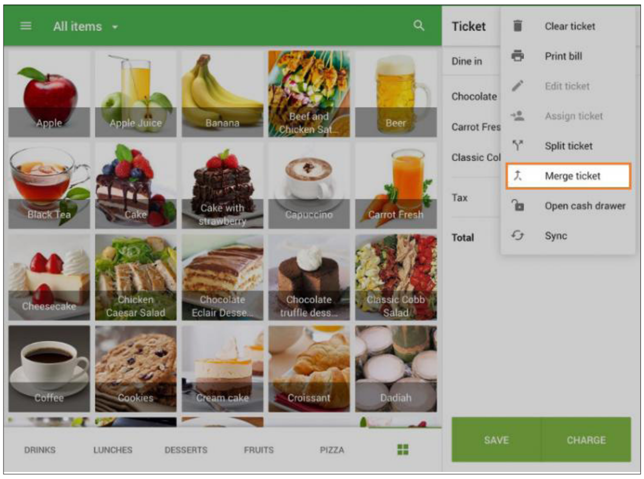


Select a name for the merged ticket and tap the ‘Merge’ button to save.

3

2.11.2 Merging tickets in the sale screen

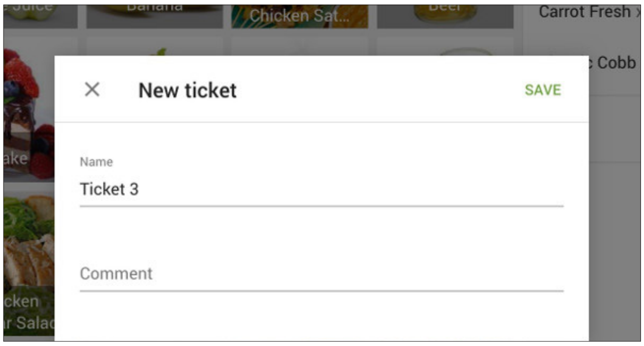
1



You can merge open ticket directly from the sale screen.

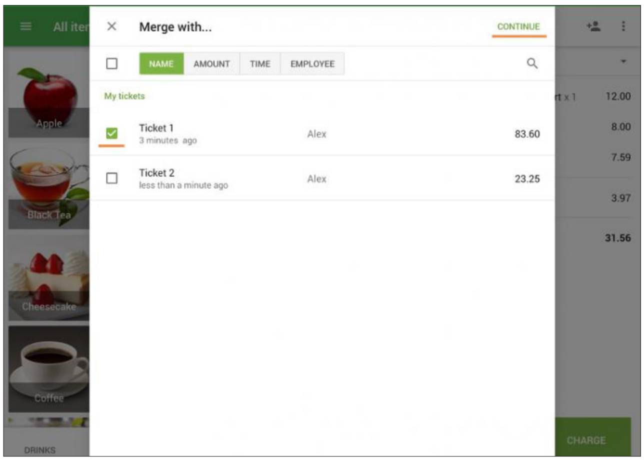
Tap the ‘Merge ticket’ button by tapping the three dots.

2



In the open window, you can edit the name and comment on the ticket. Tap ‘Save’ to go to the next step.

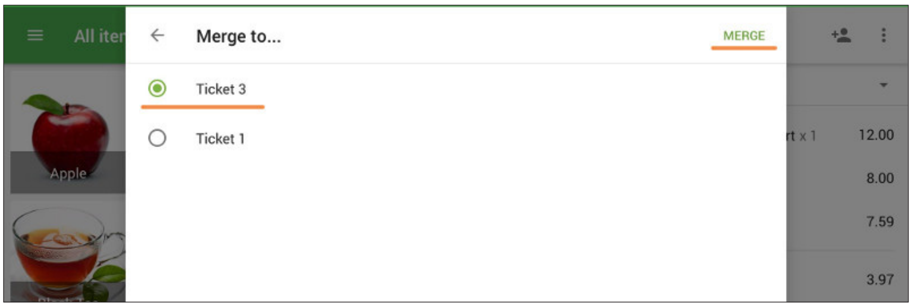
3



Select the ticket(s) you would like to merge your ticket with, and press ‘Continue’ at the top right-hand corner.

Select a name for the merged ticket and tap ‘Merge’ to save.

4

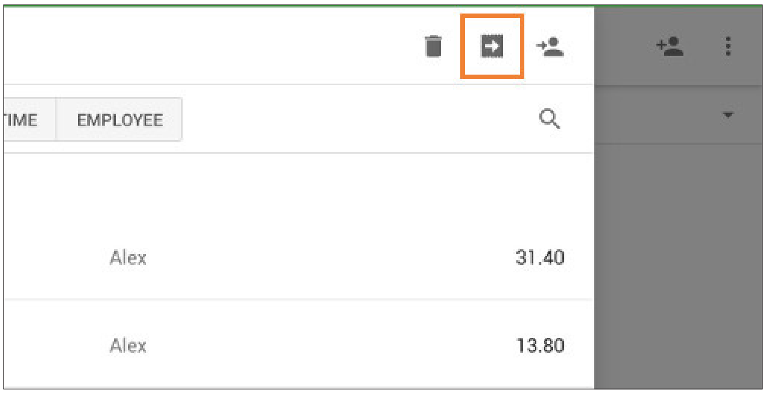


Now you can find your new ticket in the open ticket list.

Note

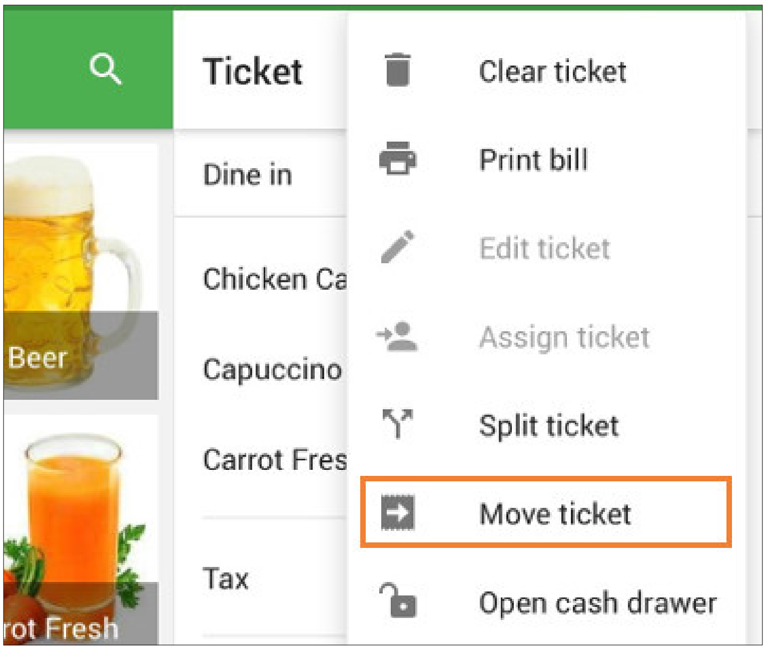
- All modifiers, comments, discounts, and taxes applied to separate items will move to the merged ticket together with their items.
-
- ‘Percentage’ and ‘Amount’ discounts applied to whole tickets will be applied to the merged ticket.

5



If you have the predefined tickets option on, instead of ‘merge ticket’, it will say ‘Move ticket’. In the same way as merging, you can move your ticket to the other one.

6

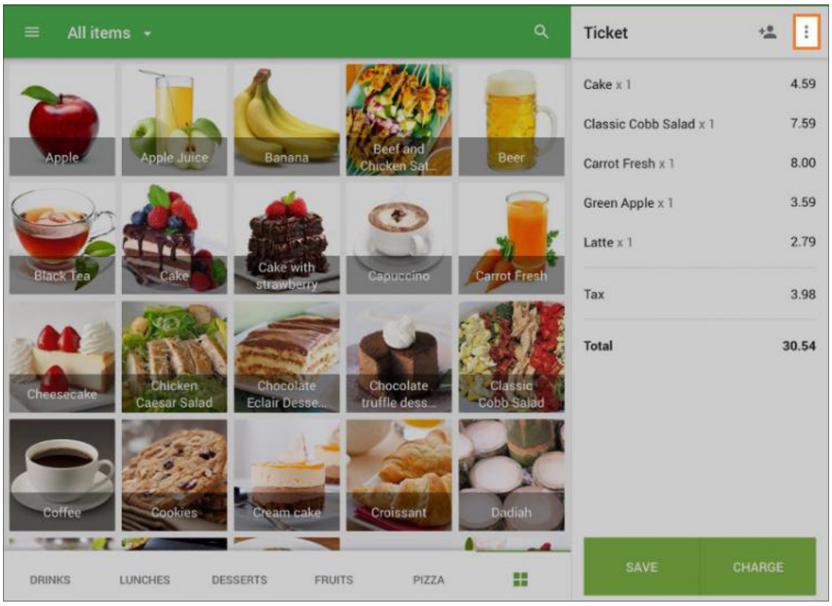


2.12 How to Split an Open Ticket with Loyverse POS

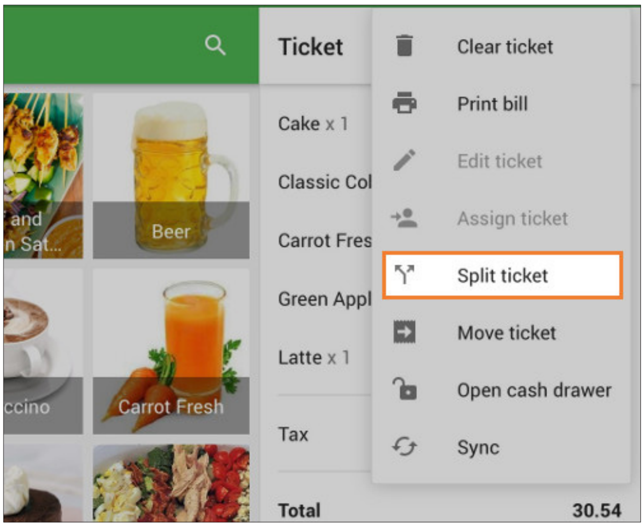
Splitting a ticket allows the cashier to separate its items into multiple new tickets. First, please be sure that the open ticket option is activated in the Back Office.

Once you have an open ticket when selling on the mobile application, click on the 'Split ticket' button by the three dots (⁝)

1

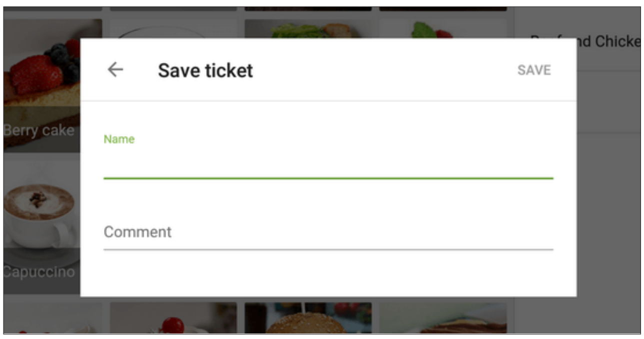


2

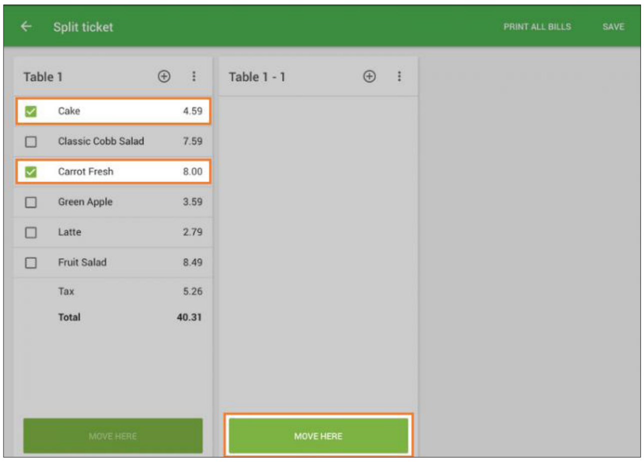


In the opened window, you can set the name and add comment of the ticket.

3

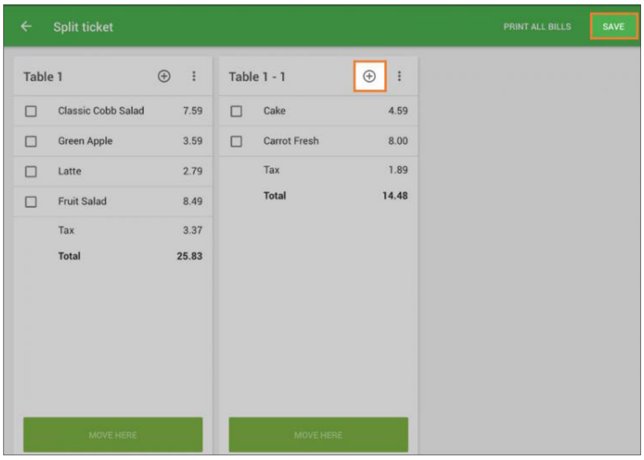


4



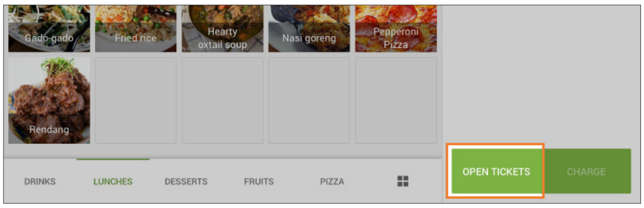
Now you'll see the 'Split ticket' screen with the original ticket on the left side and the new ticket on the right. Tap to select the items that you want to move and click the button 'Move here' on the new ticket.

5



Tap the '⊕' to add a new additional ticket, if needed. Newly split tickets are ordered numerically (1, 2, 3, etc.). You can create up to 20 tickets. Add items to each new ticket, then press the 'Save' button to save your tickets. Tickets without items will not be saved.

6

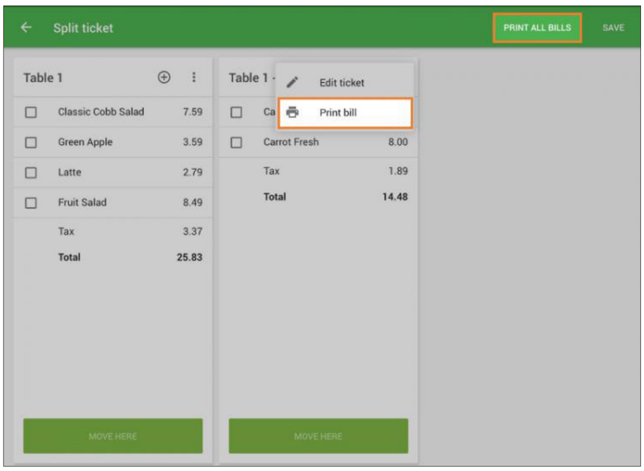


Now you can work with your split open tickets as usual. You can find new open tickets by clicking the 'Open tickets' button on the sale screen.

Note

- All modifiers, comments, discounts, and taxes applied to each individual items will move to another ticket, together with their items.
- 'Percentage' discounts applied to the whole original ticket will be applied to all new tickets. You can move the 'Amount' discounts applied to the whole original ticket to any ticket, in the same way you move items.

7



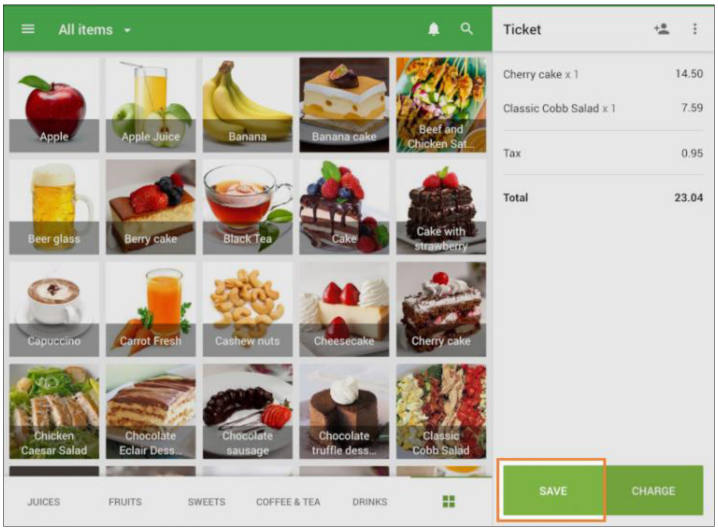
If you have a printer connected, at the 'Split ticket' screen, you can print a bill for each ticket or bills for all tickets.

2.13 Open Tickets Synchronization

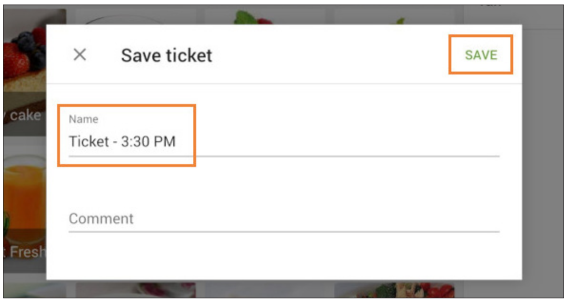
The ‘Open tickets’ option should be activated in your Back Office (see Open Tickets setup).

Add items to the ticket. Tap the ‘Save’ button to save the open ticket.

1



2

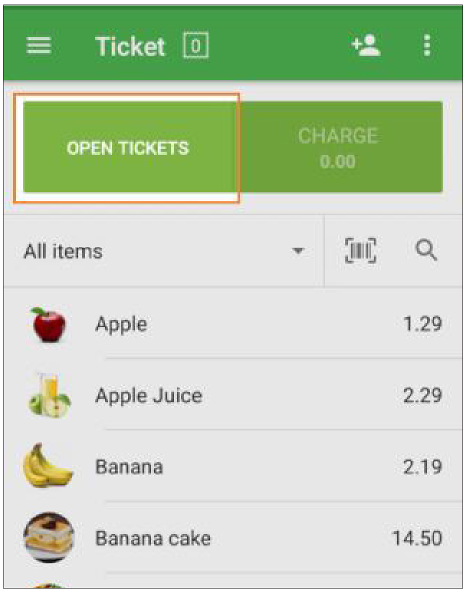


Give your ticket a name or chose a pre-defined name. And tap ‘Save’.

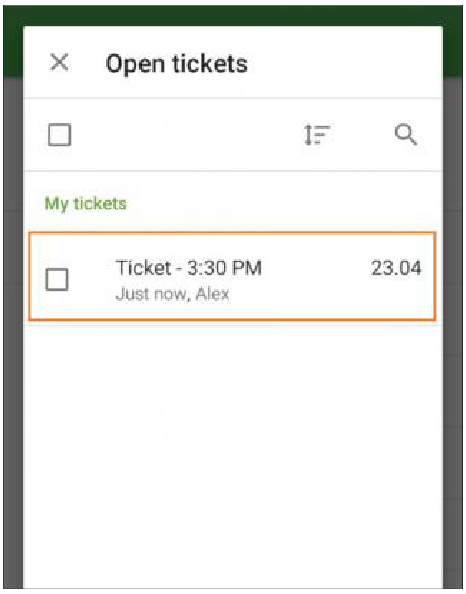
The list of open tickets can be seen on any POS device in the same shop and can be changed or closed.

Open the saved ticket on another device.

3

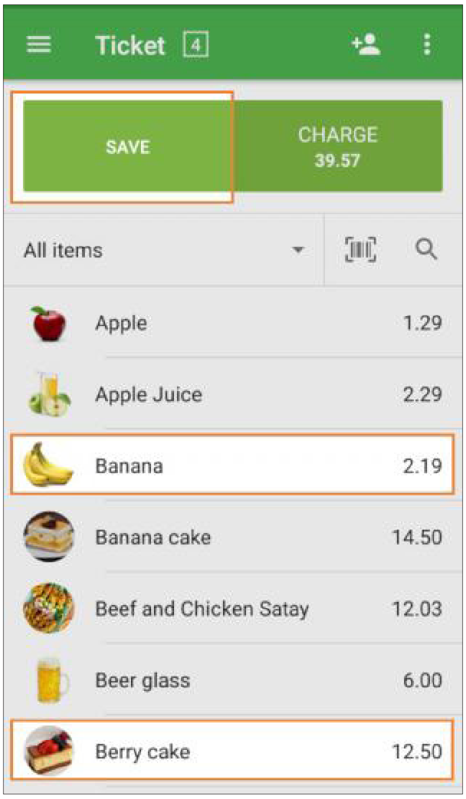


4



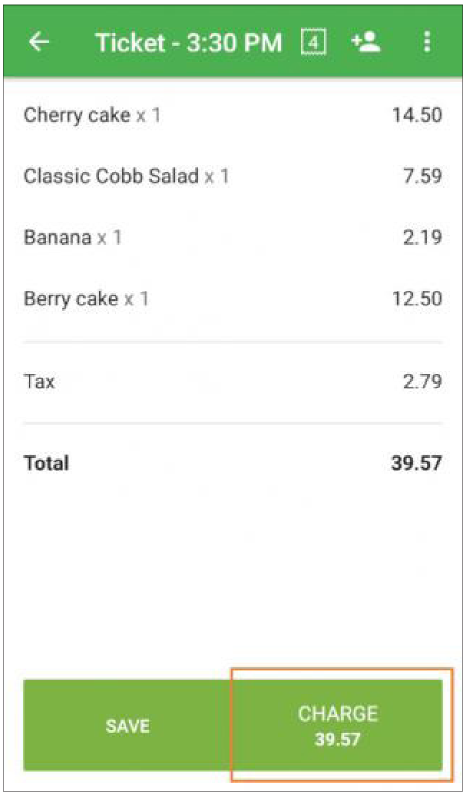
If necessary, you can add other items to the ticket.

5



Click on ‘Charge’ to complete the sale.

6



2.14 How to Use Predefined Open Tickets to Name Tables

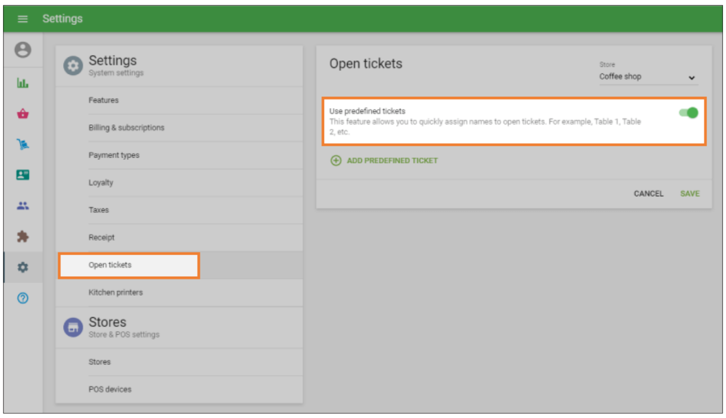
This feature allows you to quickly assign names to open tickets. For example, Table 1, Table 2, etc.

Please be sure that the Open tickets option is activated in the Back Office.

2.14.1 Configuration

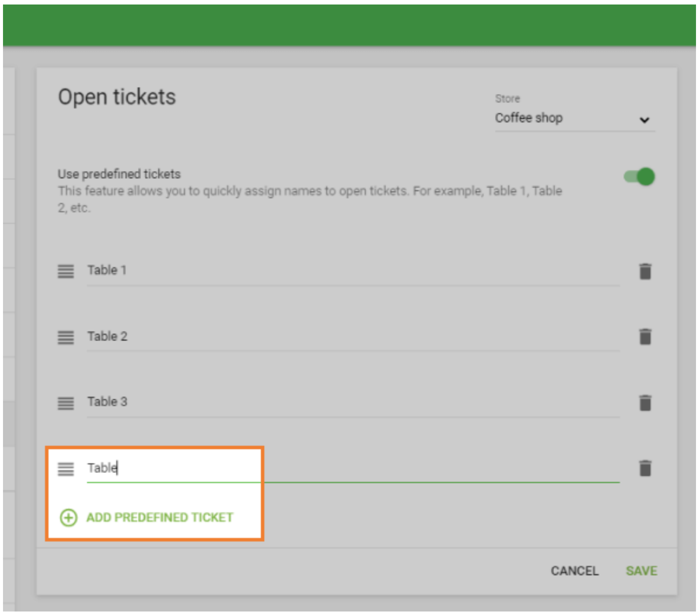
Login to the Back Office, click on the ‘Open tickets’ button in the Settings menu. Switch on the ‘Use predefined tickets’ slider.

1



You can create a new open ticket by clicking on the ‘Add predefined ticket’ button and name it, for example, Table 1, Table 2, etc.

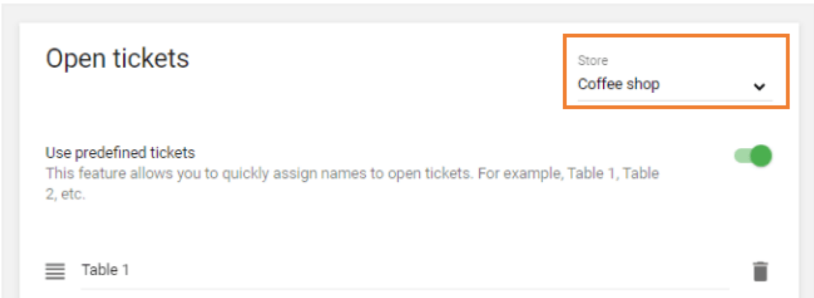
2



Don’t forget to save changes.

If you have multiple stores, you can make a separate set of tickets for each one. To do this, choose the store from the drop-down list.

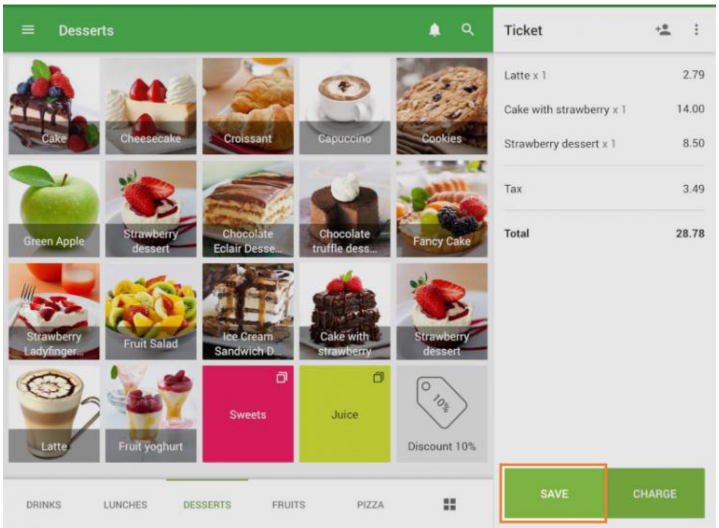
3



2.14.2 Creating Open Tickets

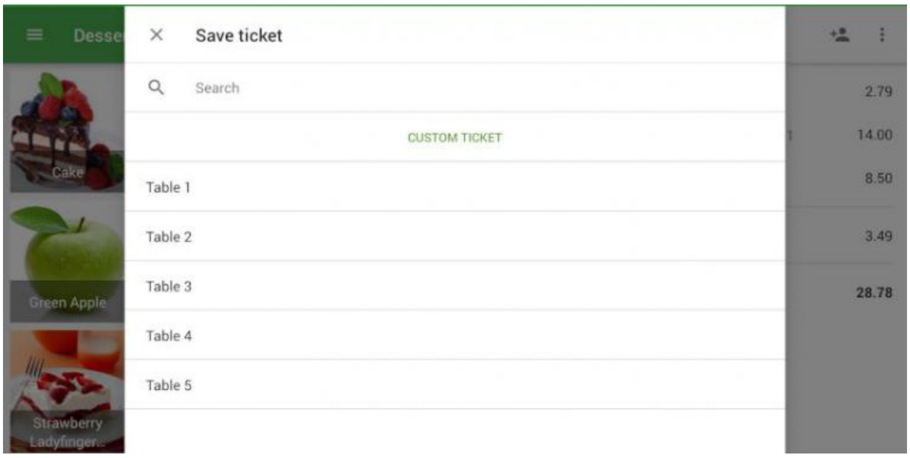
During sales, in the Loyverse POS app, when your ticket is formed, click on the ‘Save’ button.

1



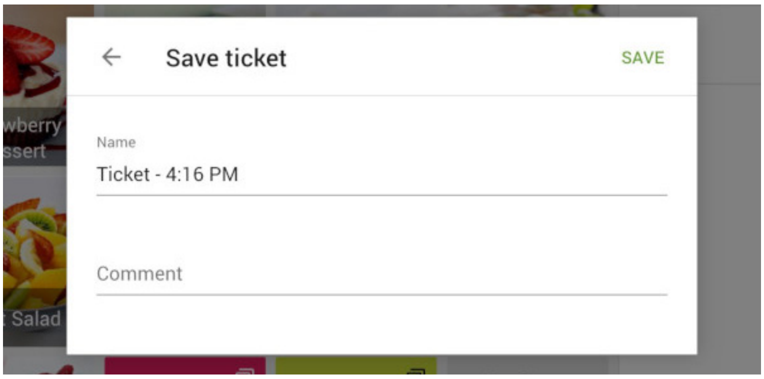
On the next screen, you will see the list of predefined ticket names. If you choose one, the ticket will be saved with the chosen name. The list does not show already occupied predefined tickets.

2



You can also choose 'Custom ticket' instead of predefined one; just fill in its Name and Comment fields and tap 'Save'.

3

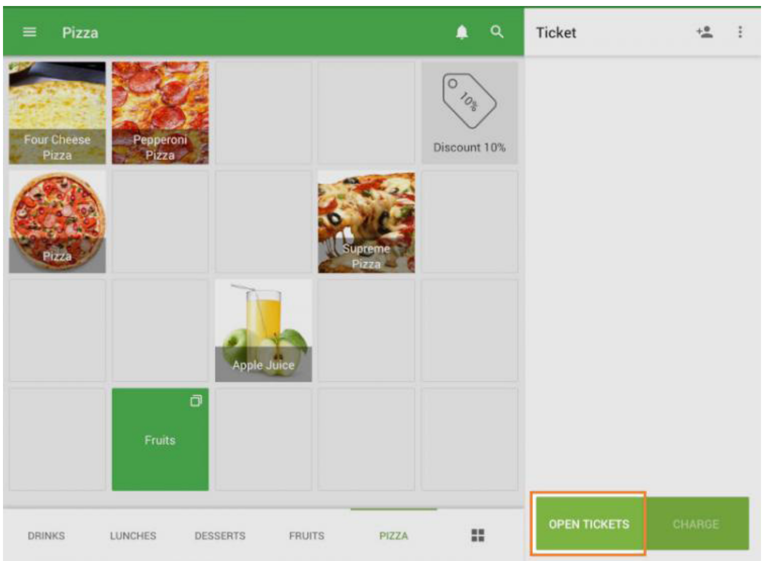


2.14.3 Editing Open Tickets

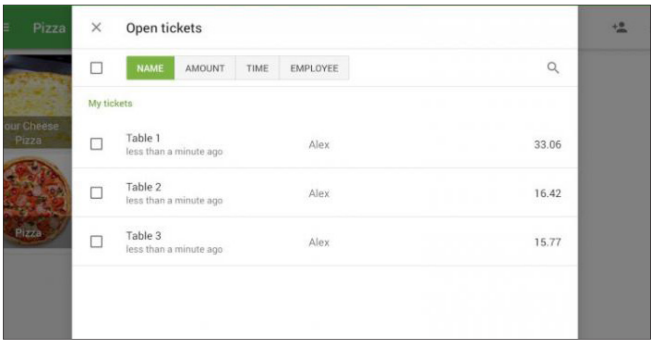
You can edit, split, or move saved predefined open tickets.

Click on the button 'Open tickets' to access the list of active open tickets.

1

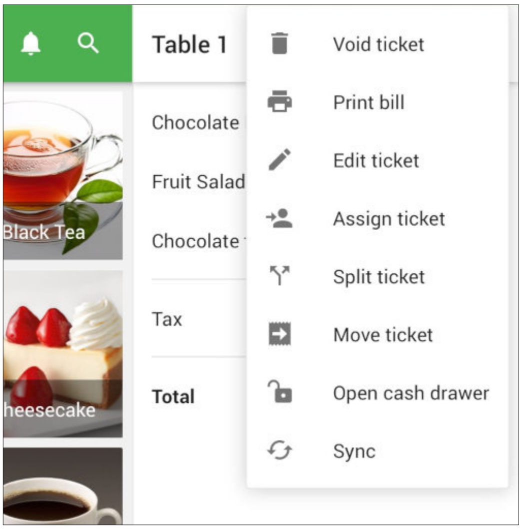


2



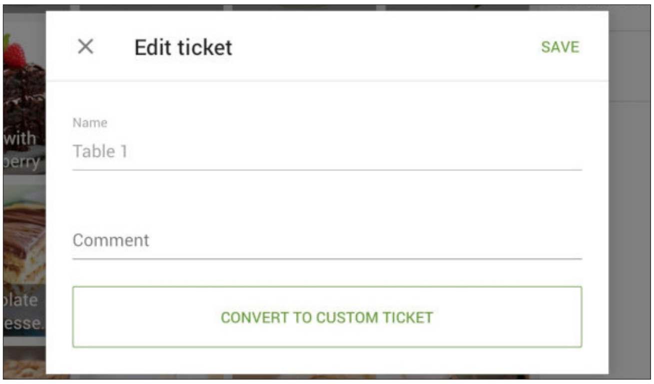
Tap the ticket from the list to edit.

3



In the three-dot menu, you can choose edit, split, or move ticket.

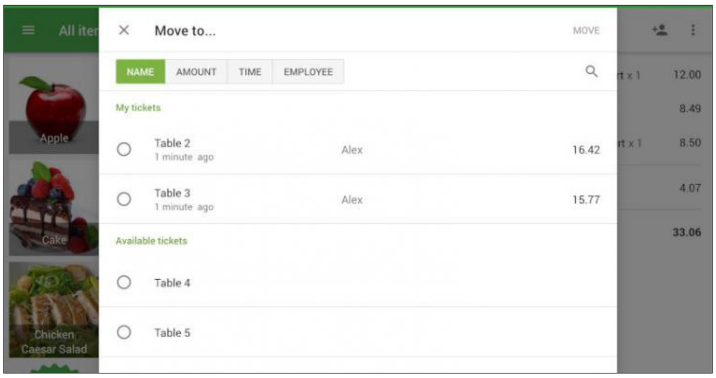
4



By editing, you can add or change the comment to the ticket or convert it to a custom one.

Splitting predefined tickets works the same as regular open tickets ([How to Split an Open Ticket with Loyverse POS]()).
But instead of merging ticket ([How to Merge Open Tickets with Loyverse POS]()), predefined tickets has the ‘Move ticket’ option. You can move your ticket to other predefined or a custom one. Choose your destination ticket and tap ‘Move’.

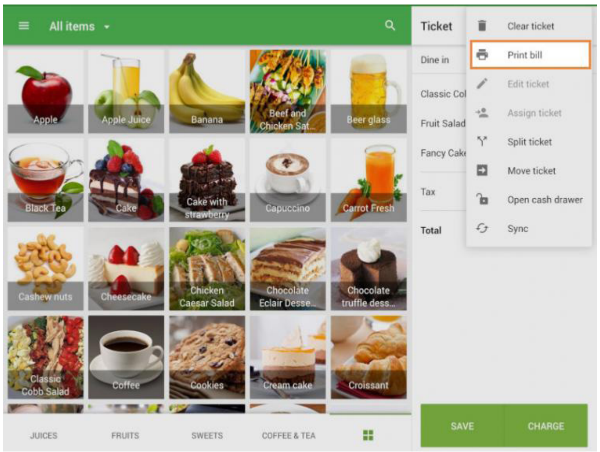
5



2.15 How to Print Bill

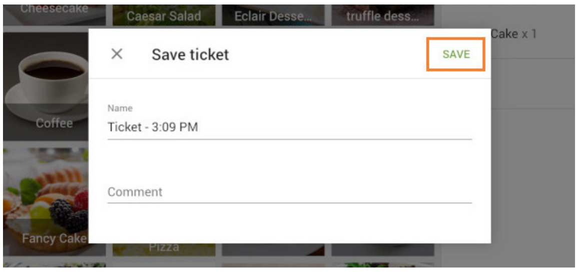
The bill printing option works when the [‘Open tickets’]() function is activated in the Features section of Settings in the Back Office. Also, make sure the receipt printer is paired with your Loyverse POS ([How to Set Up Ethernet Printer in Loyverse POS]()).

1



While selling on the mobile application, once you have formed a ticket, in the top right corner, press the three dots and select the ‘Print bill’ button from the drop-down menu.

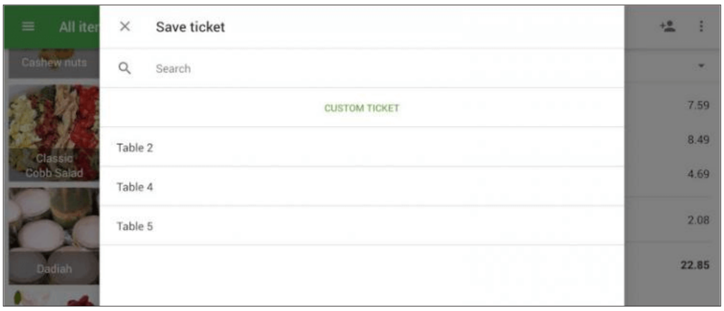
2



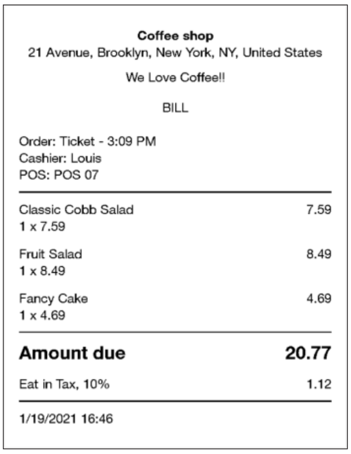
The system will allow you to edit the name of the ticket and add a comment. The bill will be printed after you tap the ‘Save’ button.

If you have the predefined ticket functionality on, you have to select one from the predefined ticket list. After this, the ticket will be saved with the chosen name, and the bill will be printed.

3



4



Coffee shop
21 Avenue, Brooklyn, New York, NY, United States
We Love Coffee!!
BILL

Order: Ticket - 3:09 PM
Cashier: Louis
POS: POS 07

Classic Cobb Salad 1 x 7.59	7.59
Fruit Salad 1 x 8.49	8.49
Fancy Cake 1 x 4.69	4.69
Amount due	**20.77**
Eat in Tax, 10%	1.12

1/19/2021 16:46

There are some differences between the look of the bill and the receipt:

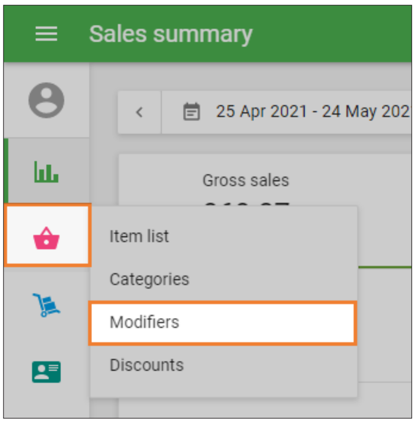
- The Bill has the title BILL at the top, while the receipt does not have it
- The bill does not have a number, which is on the bottom of the receipt
- The bill has the "Amount due" line as a summarizing amount of items, while the receipt has "Total”
- The bill does not have the type of payment line as the receipt

2.16 How to Set Up and Apply the Modifiers

The modifier is a set of options that can be applied to the items. They help to sell the same item with different options, such as fillings or toppings. With proper application, modifiers will simplify and accelerate the sales process, as well as provide information about which options are most often selected by clients.

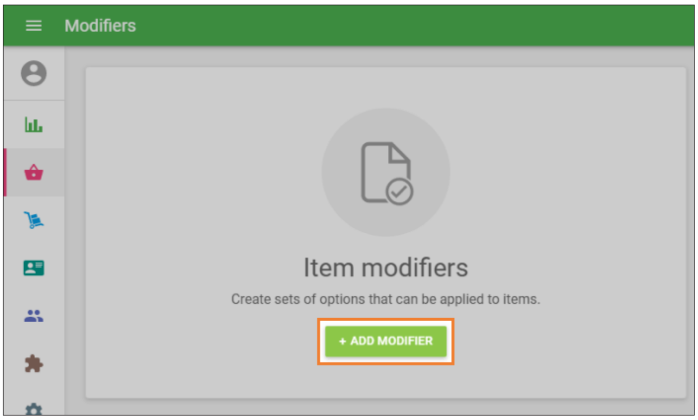
2.16.1 Creation and set-up of modifier

1



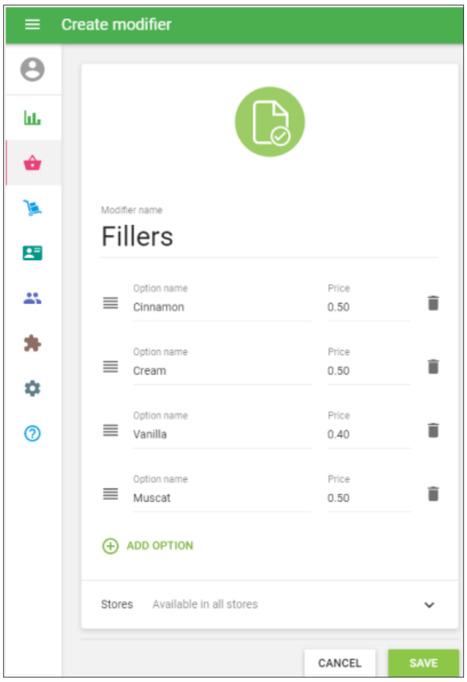
In the Back Office at ‘Items’ menu, click on ‘Modifiers’.

2



To create a modifier, click ‘+ Add modifier’ button.

3



In the ‘Create modifier’ form, enter the modifier name. Then fill in the ‘Option name’ and ‘Price’ fields. During a sale, the price of the applied option will be added to the item’s price. To create more options, click ‘Add option’.

Don’t forget to save your modifier.

Now you have to assign modifiers to each item.
In the Back Office, go to the ‘Item list’ and open the necessary item to edit. Find the Modifiers section. Activate those modifiers which you want to apply to this item when selling.

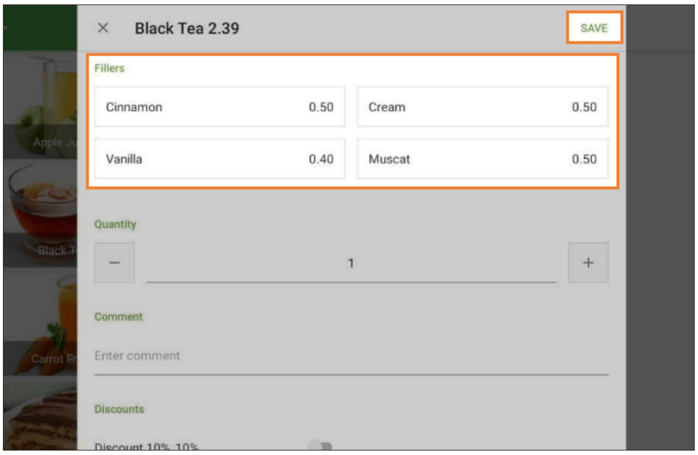
4

Click ‘Save’.

2.16.2 Sales and reports

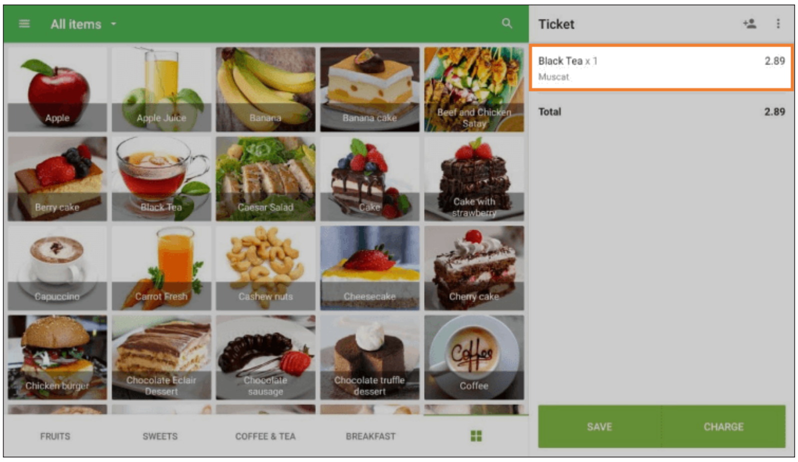
When selling from your mobile application, select the item with the modifier. A dialog box will open. Choose the modifier you want to add to the item and tap ‘Save’.

1



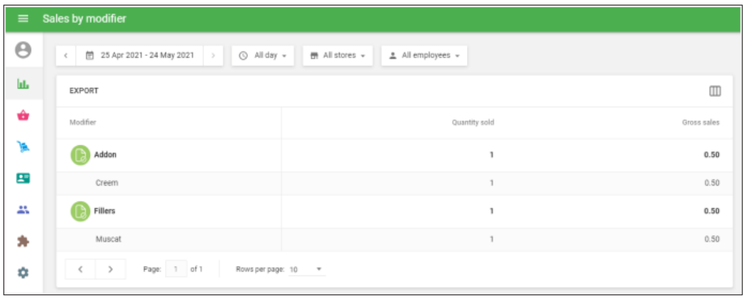
An item with the selected options will appear on the ticket.

2



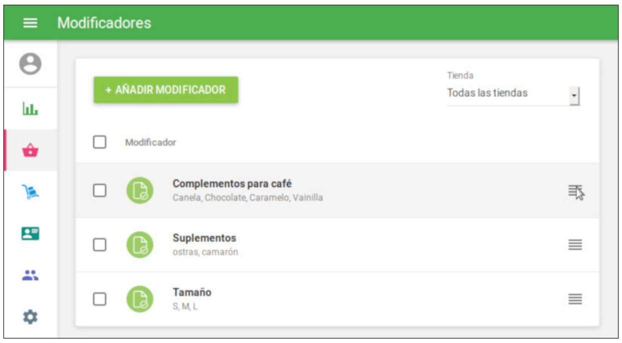
Then continue all the same steps as in usual checkout process. Taxes and discounts on the goods are already calculated taking into account the modifiers added to them.

3



Modifiers do not have 'Track stock' option, but you can check the consumption of modifiers in the Report section. Reports about modifiers can be found in the Back Office at the 'Reports' menu and 'Sales by modifier' section.

4



You can change the order of modifiers at the sale screen by clicking and dragging the four line pictogram in the Back Office.

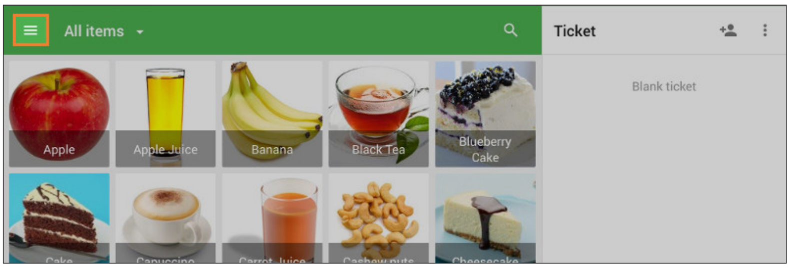
Note

You can change the order of modifiers only when All stores are selected.

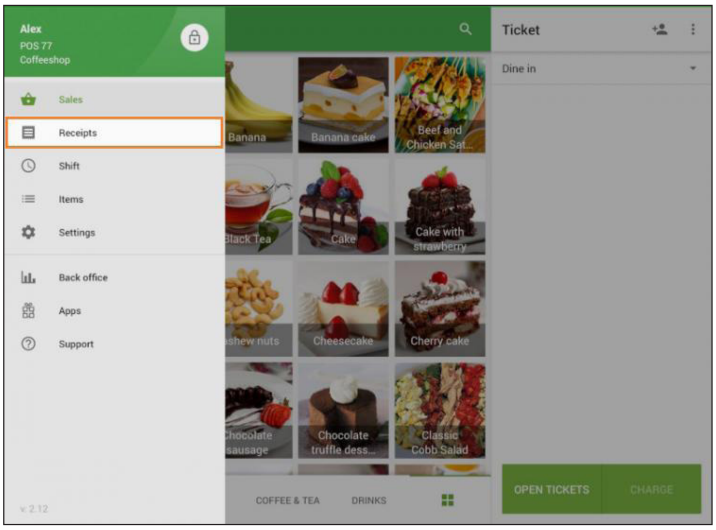
2.17 How to Issue a Refund on Loyverse POS

To issue a refund on the Loyverse POS app, go to the receipts list by tapping the 'Receipts' button in the POS menu.

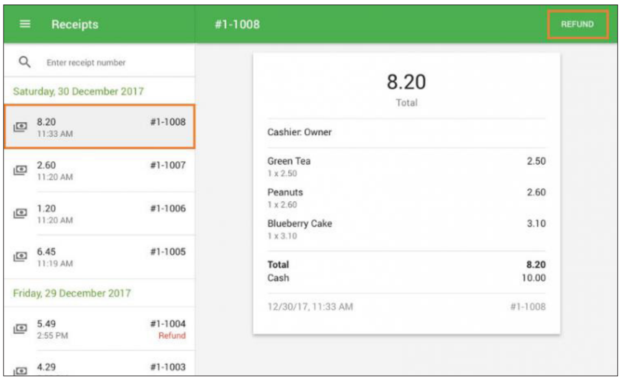
1



2

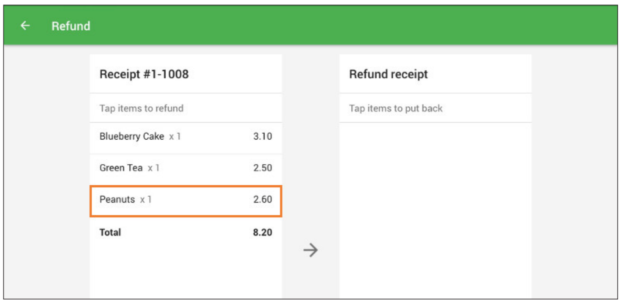


3



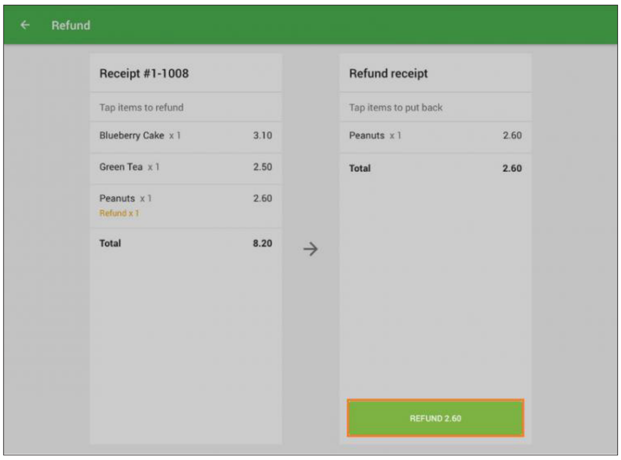
From the list of receipts, choose the one that needs to be refunded. Then tap the ‘Refund’ button.

4



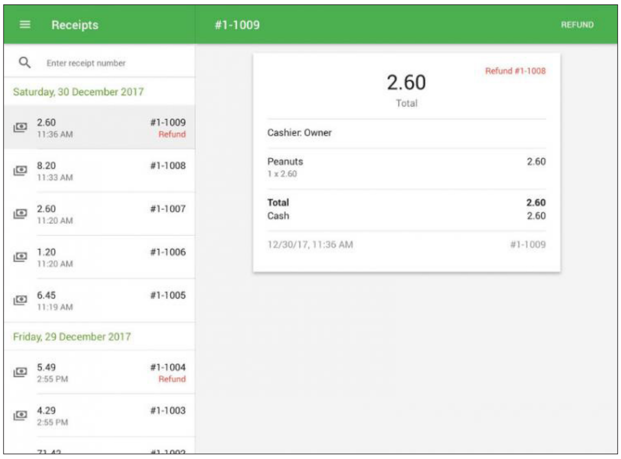
Tap the item to be refunded from the receipt on the left side, and it will appear on the ‘Refund receipt’ on the right.

5



Then tap the ‘Refund’ button at the bottom.

6



In the receipt list, the refunded receipts will be marked in red text.

Note

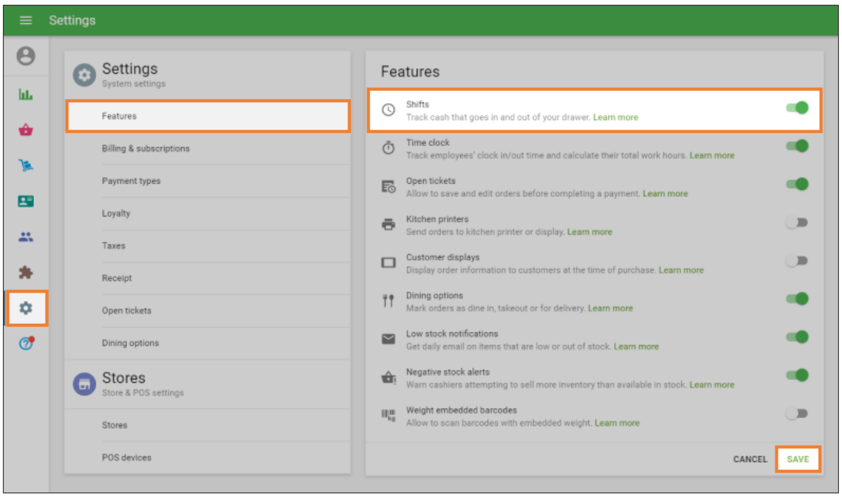
You can issue a refund only when the device is connected to the Internet.
The stock of the refunded items will be increased by the quantity that has been refunded.
You can process a refund of the receipts issued on other POS from the same store.

2.18 Shift Management in Loyverse POS

In order to use the ‘Shifts’ feature, log in to your Back Office and go to the Settings.

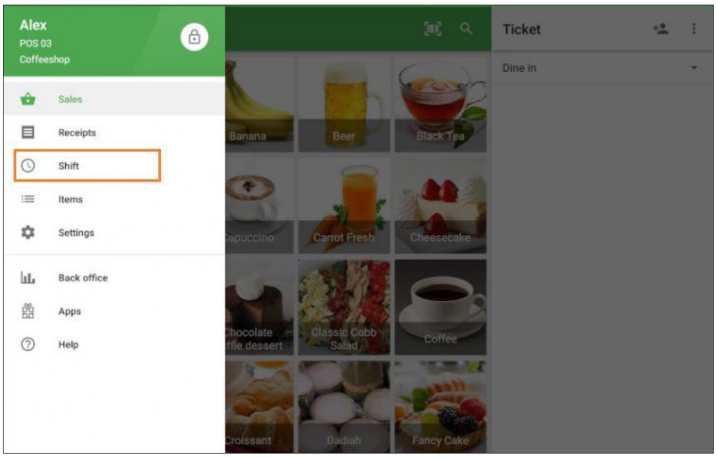
Switch on ‘Shifts’ option in the Features section. Click the ‘Save’ button.

1



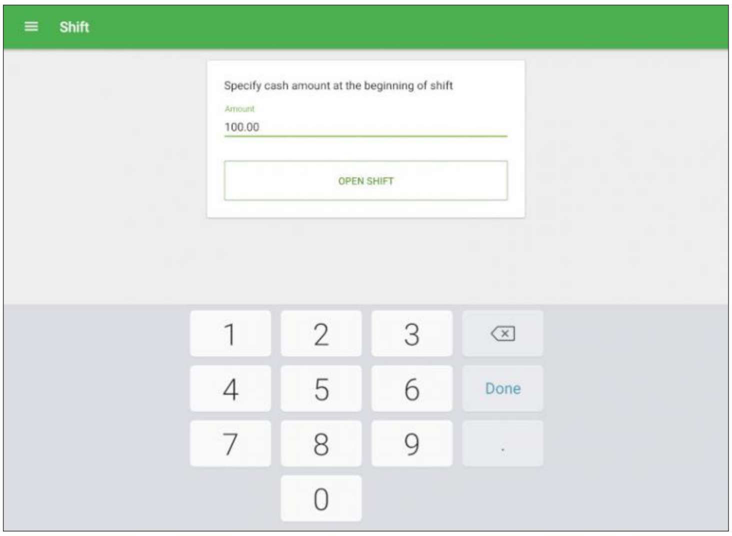
On the Loyverse POS app, go to the ‘Shift’ menu.

2



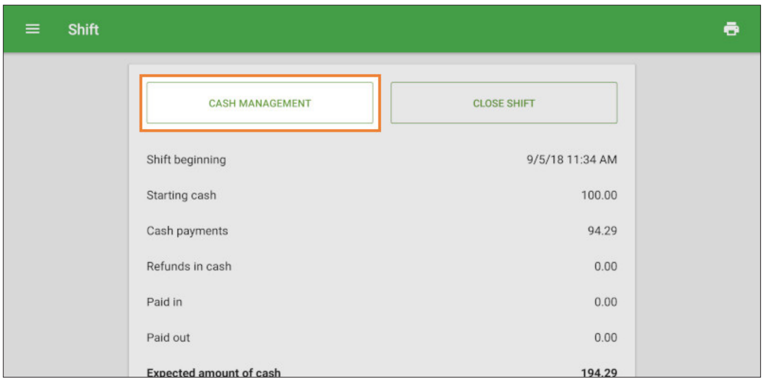
Specify the cash amount at the beginning of the shift and tap the ‘Open shift’ button.

3



For cash management during the shift, go to the 'Shift' menu and tap the 'Cash management' button.

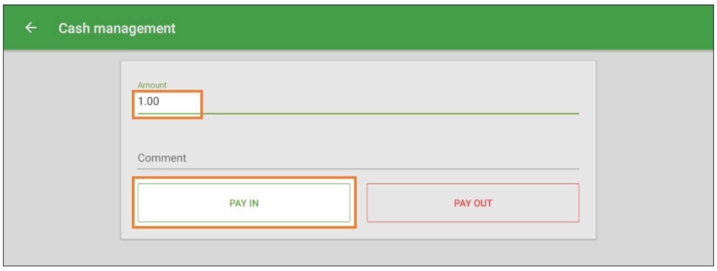
4



Let's say we want to pay in one dollar into the cash drawer and later pay out two dollars.

Enter the amount and tap the 'Pay In' button if you put money into the cashier without a purchase.

5

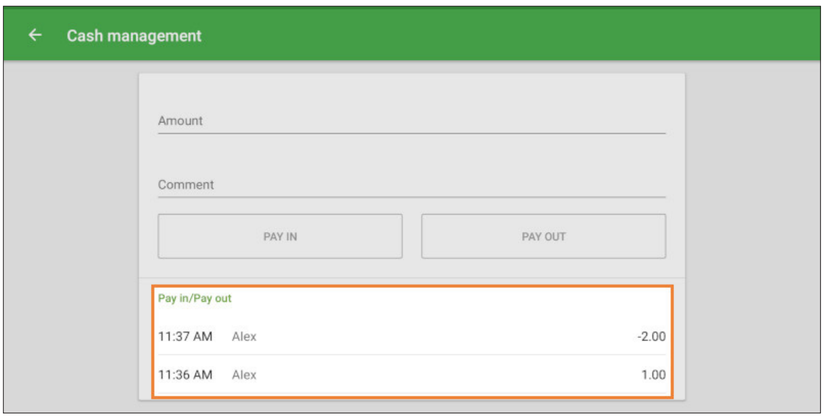


Tap the 'Pay Out' button if you want to take money out from the cashier.

6

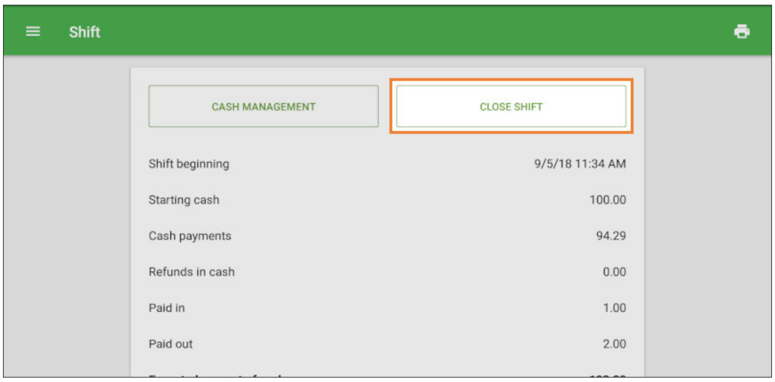
All of the cash management histories will be recorded from the 'Pay in' and 'Pay Out' buttons.

7



At the end of the day when you close the shift, go to the ‘Shift’ menu and tap the ‘Close shift’ button.

8

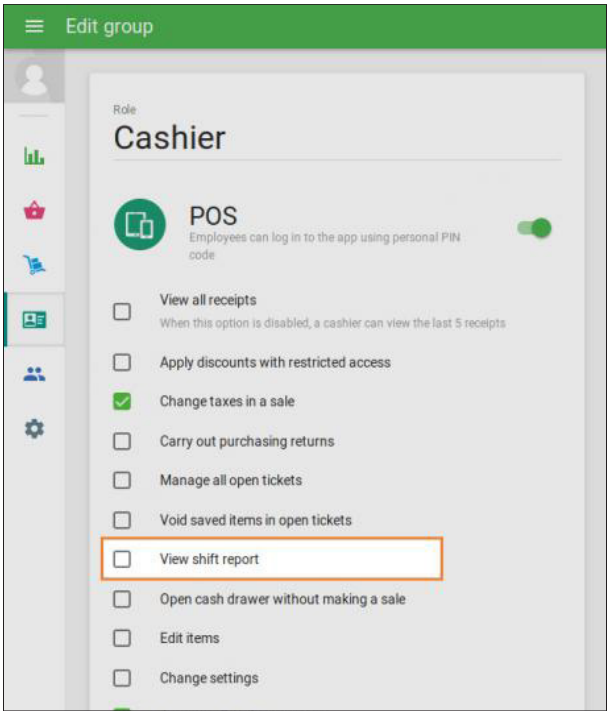


You can see a closed shift form. ‘Expected amount of cash’ is calculated from sales, refunds, and cash paid in/out during the shift. If you enter your ‘Actual cash amount’, you can see the difference between them. Tap ‘Close shift’ to finish the shift.

9

If you want to hide the ‘Expected cash amount’ from your cashiers, you can restrict their access rights. To do this, go to the ‘Access rights’ menu in the Back Office and open the ‘Cashier’ user group for editing. Deselect the ‘View shift report’ option.

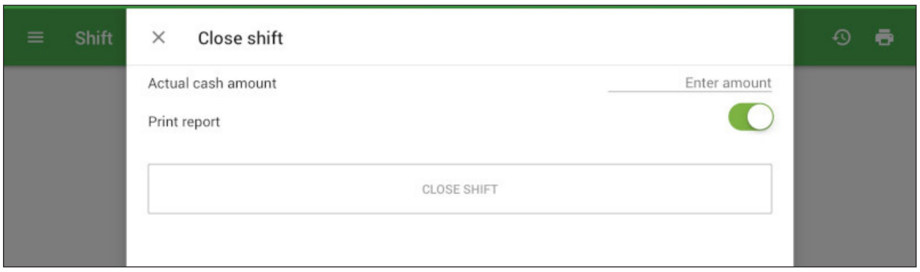
10



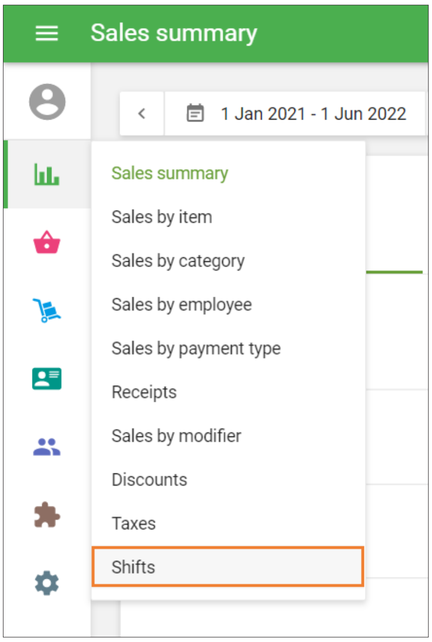
Don’t forget to save changes.

After that, when your cashiers are closing the shift, they can only see the field to enter the 'Actual cash amount.'

11



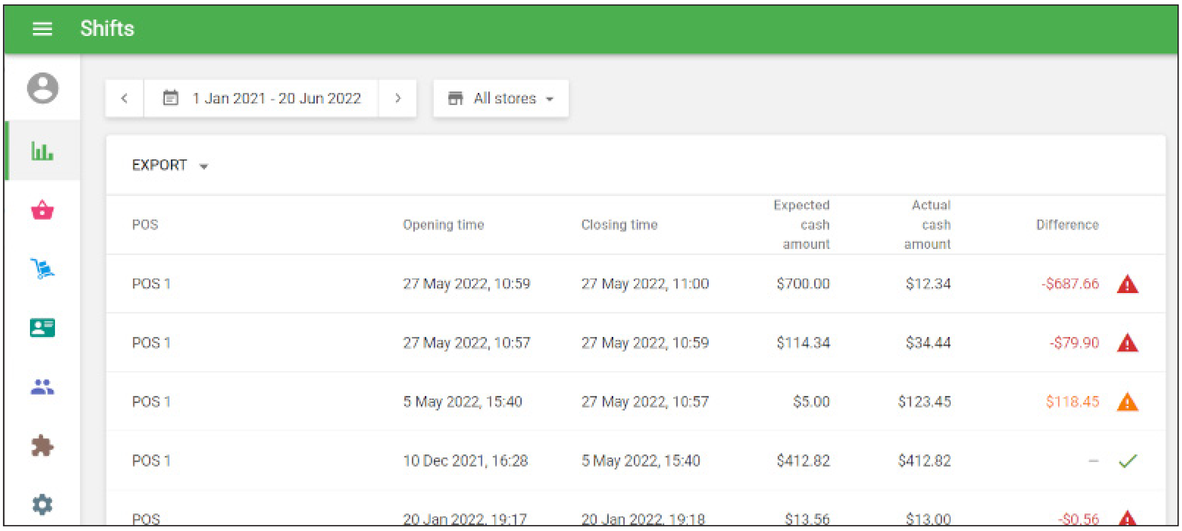
12



Shift reports you can find in the Reports menu of the Back office.

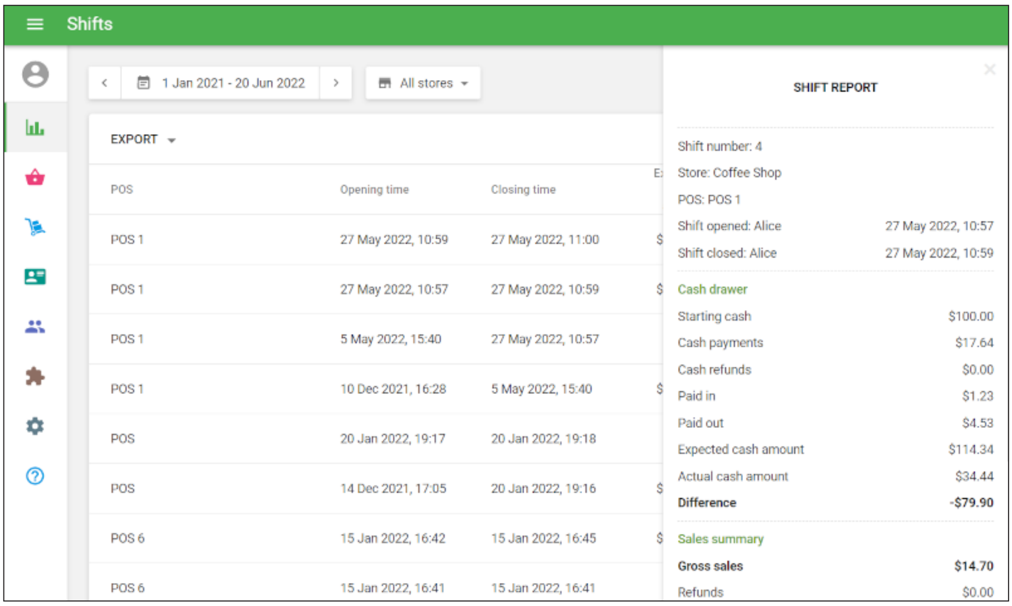
Each shift has a row with the name of the POS, Opening and Closing time, Expected cash amount, Actual cash amount, and the difference between Expected and Actual cash amount.

13



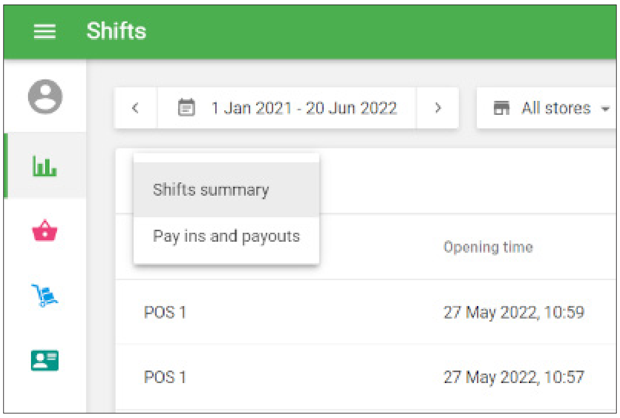
By clicking on the shift row you see the detailed information about the specific shift.

14



You can export a basic Shift summary report or Pay ins and payouts report to see the cash management history.

15



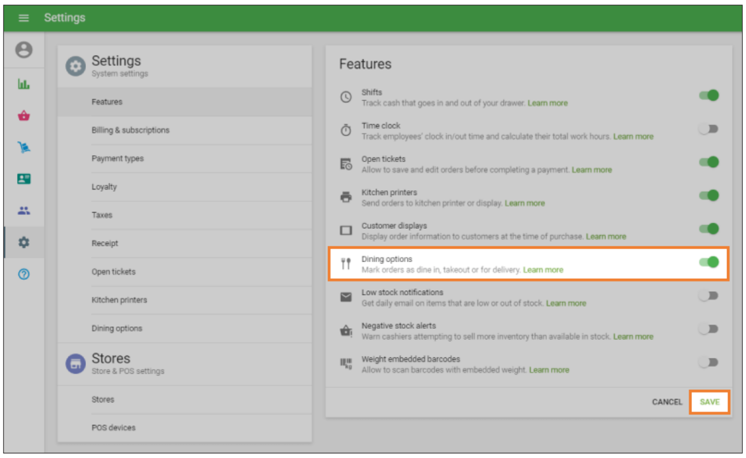
2.19 Dining Options

Dining options allow you to note whether customers are dining in, taking their order out, or requesting delivery.

2.19.1 Configuration of Dining Options

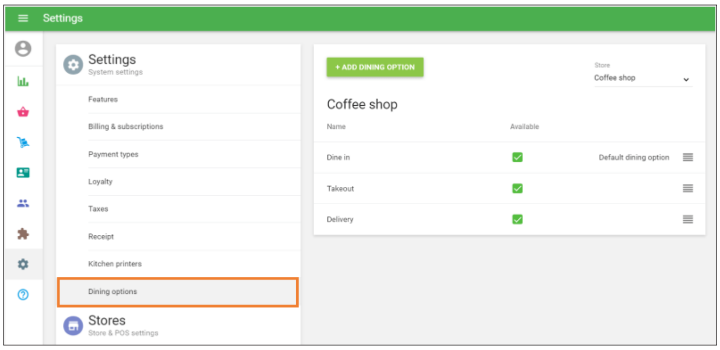
Login to the Back office, navigate to the Settings menu, Features section, and switch the 'Dining options' slider on.

1



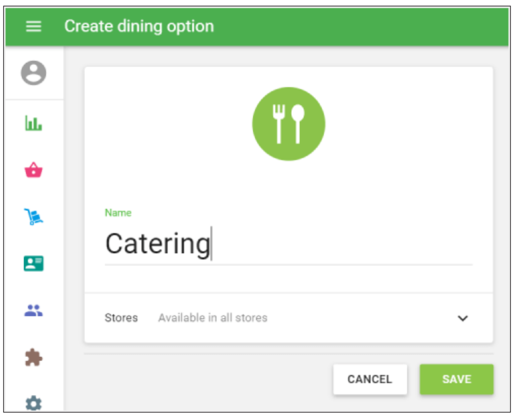
Don't forget to save changes.
After that in the Settings menu 'Dining option' section appears. There are default presets for three of the most common types of options: 'Dine in', 'Takeout' and 'Delivery'.

2



You can edit these options by clicking on them or create new by clicking on 'Add dining option' button.

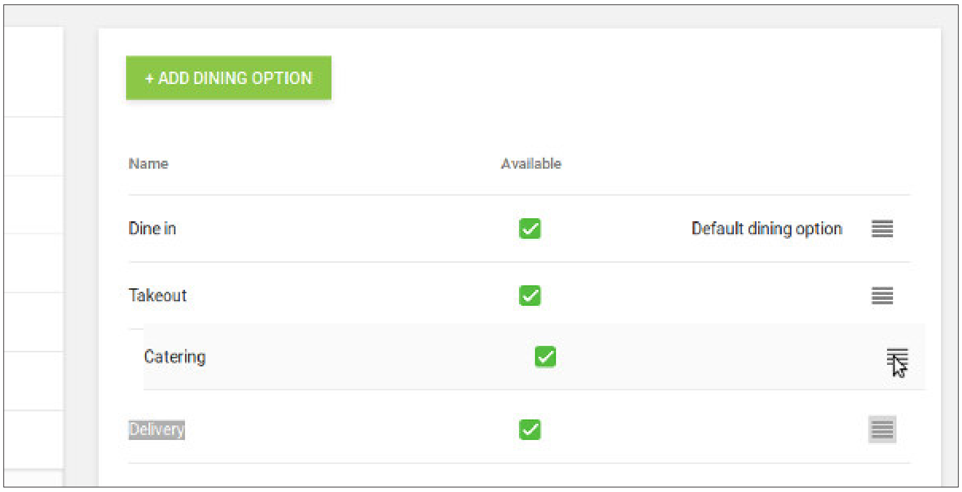
3



Don't forget to save changes.

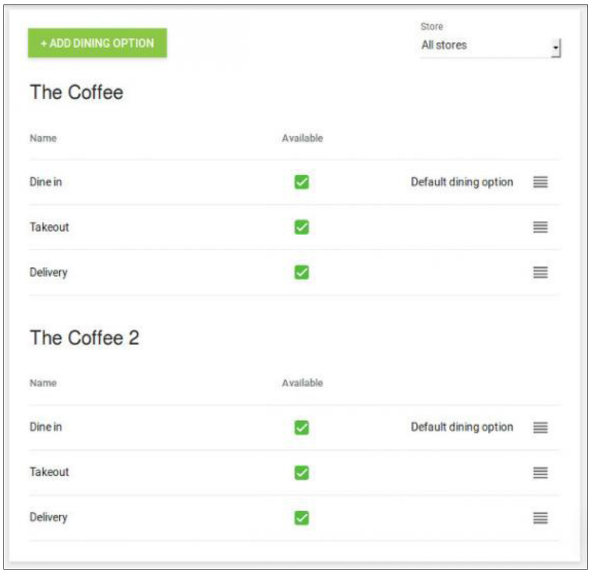
Click and drag four line pictogram to change an order of the options. The first option will be used by default.

4



If you have multiple stores, you can manage the dining options for each store.

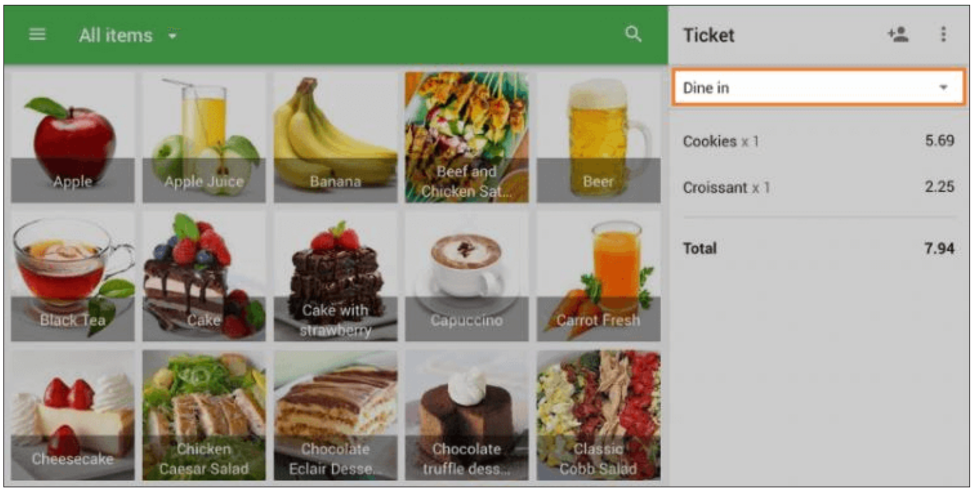
5



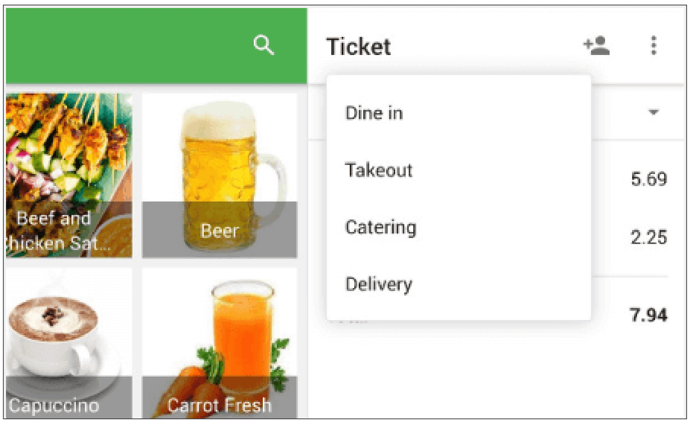
2.19.2 Using Dining Options during Sale

During sales at the ticket, you can see dining options line with the default option.

1



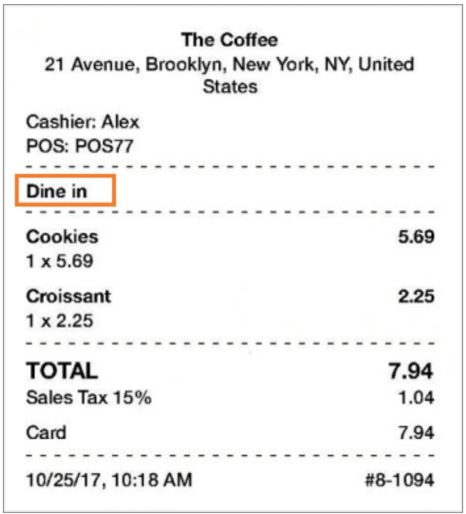
2



If you tap on this line, you can see the drop-down menu with all dining options. Choose needed one.

Dining options will be shown on the printed receipt.

3



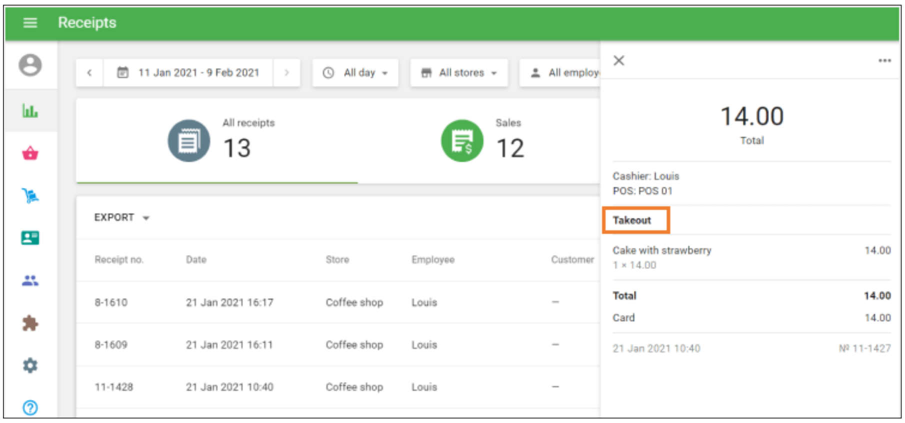
As well as at the bill if you print one.

Dining option will be shown in the e-receipt, sent to customers email.

4

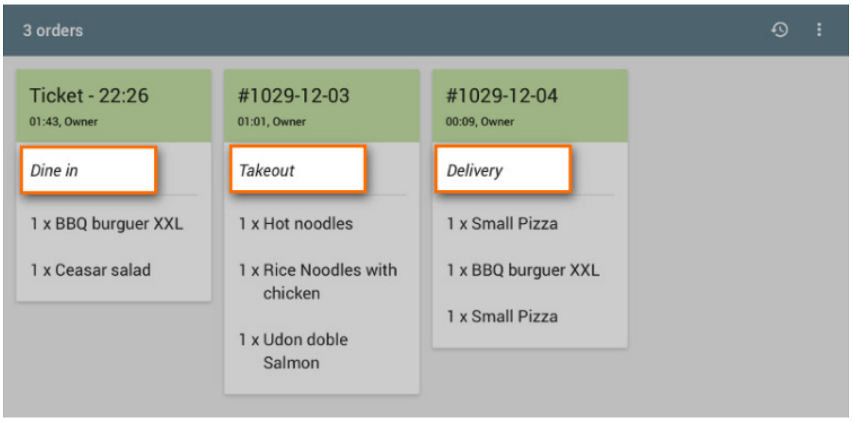
You can see dining option line in the receipts information at the Back Office or Loyverese POS app.

5



Also, dining option information will appear at the receipts information on [CDS] and at the tickets when using kitchen printers and [KDS].

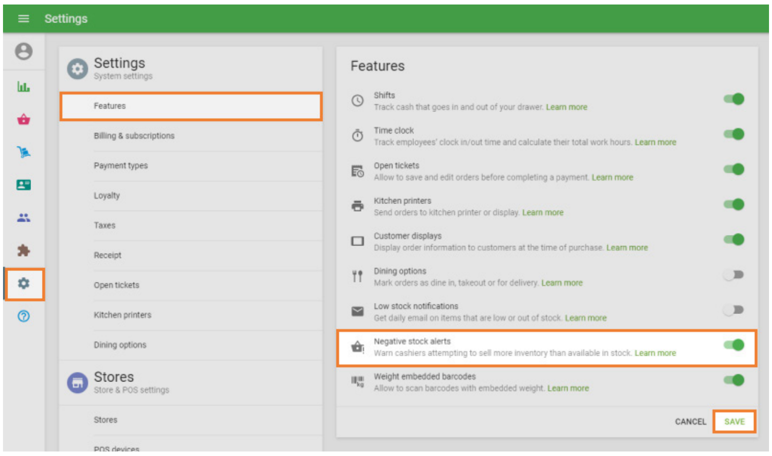
6



2.20 Negative Stock Alerts

Negative stock alerts inform the cashier about an insufficient stock of the item when he/she tries to sell more than what is available. It protects you against a negative stock in [your inventory].
Please be sure that the 'Track stock' option is activated for those items which you want to receive alerts for.
In order to use this feature, log in to your [Back Office] and go to the Settings.

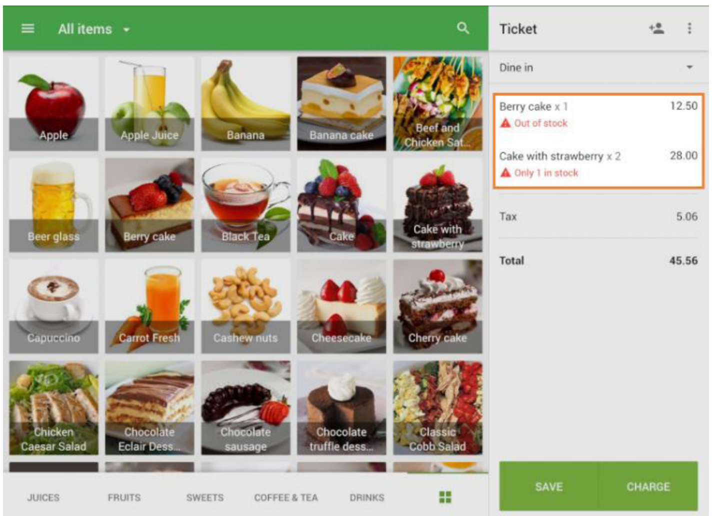
1



Switch on 'Negative stock alerts' in the Features section.

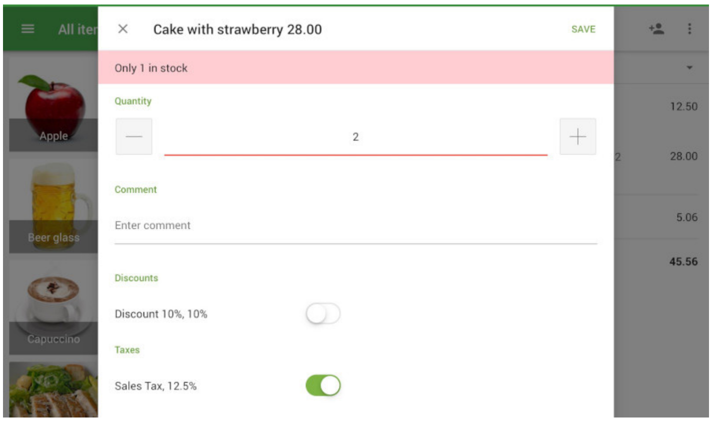
Click the 'Save' button.

2



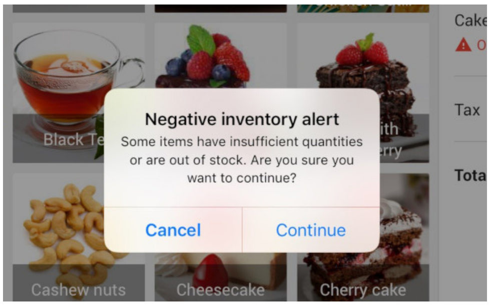
With this feature enabled, the system will show an alert about insufficient stock when the quantity of an item in the ticket is more than the current quantity in stock. Also, the system will show you the quantity that is available for sale if the stock of this item is more than 0.
Alerts work for composite items as well.

3



The warning is also displayed in the editing dialog of the item added to the ticket.

4



Cashiers can reduce the quantity of an item in the ticket and tap the Save button if the stock of the item is more than 0.
When a cashier taps the Charge button, the system will show a notification one more time.

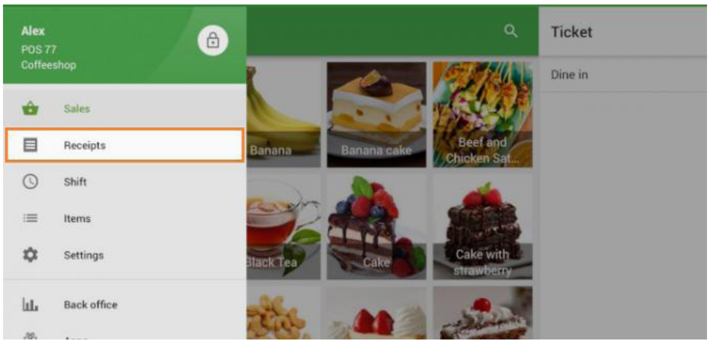
The cashier can still proceed to sell an item by tapping 'Continue'.

Note

Warnings are displayed only when there is Internet access and are not displayed in offline mode.

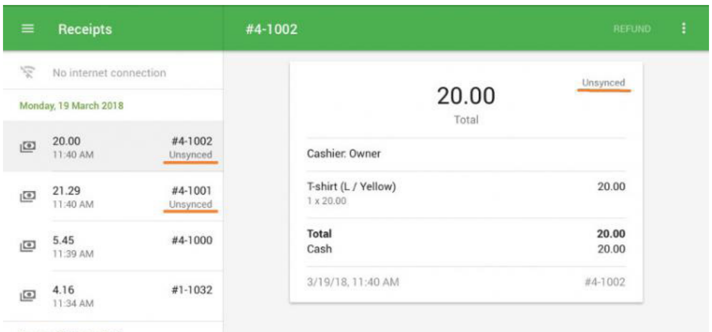
2.21 Receipts List in the POS

1



You can go to the receipts list by tapping the 'Receipts' button in the POS menu.

2

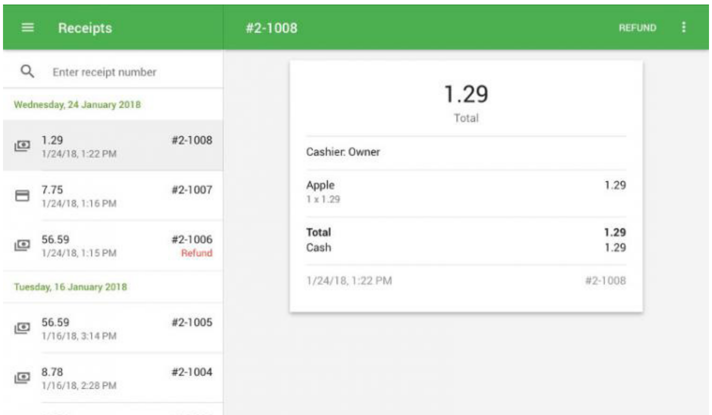


The receipts from all POS of the same store will be displayed in the list. If you want to refresh the receipts list, just swipe it down. Non-synchronized receipts (that are made during the time when there was no Internet connection) will say 'Unsynced'.

If the employee has been disabled the option 'View all receipts' (access rights in the Back office), he/she can view only the last 5 receipts.

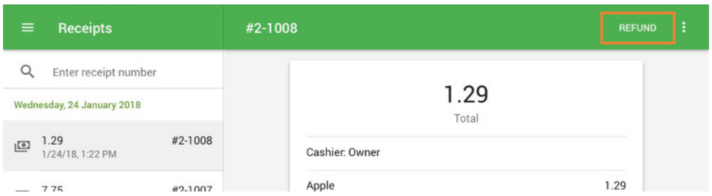
Tap on the receipt in the list to see its details.

3



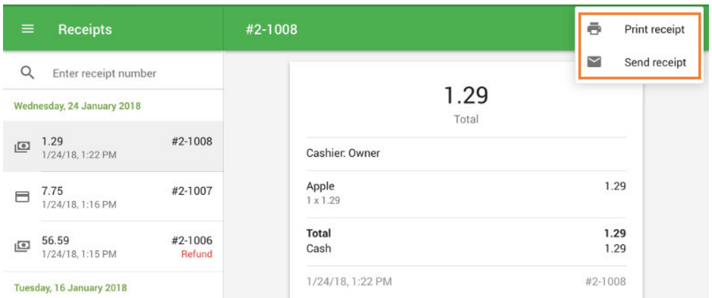
To make a refund, tap the 'Refund' button.

4



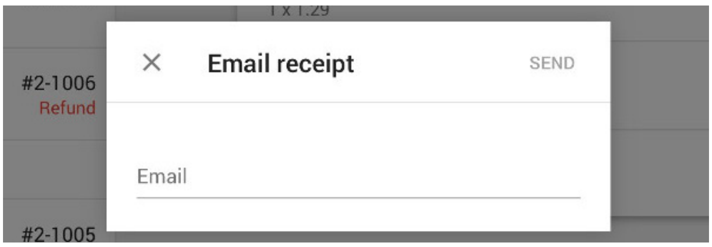
There are additional actions you can do with the selected receipt under the three dots menu (⁝) at the upper right-hand corner: 'Print receipt' (if you have connected the receipt printer) and 'Send receipt' by email.

5



If you choose to 'Send receipt', you have to enter the email of the recipient in the pop-up form and tap 'Send'.

6



Note

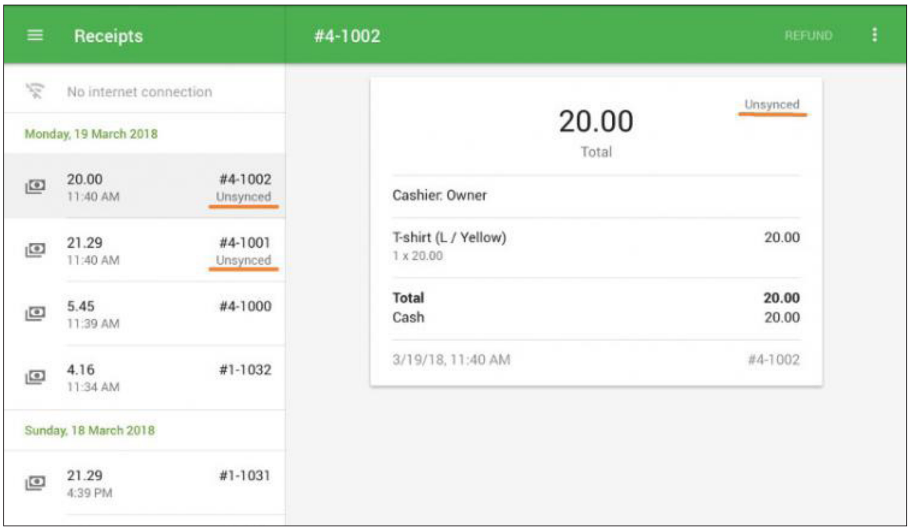
The system does not allow you to make a refund in the absence of Internet connection. The "Refund" button will be inactive.
If you email a receipt when the device is offline, it will be sent after the restoration of the Internet connection.
There will be no search field when you are in offline mode.

2.22 Offline Use of Loyverse POS

The Loyverse POS app works offline. Your device can continue to make sales and work with shifts even when it's not connected to the Internet. However, not all functions are supported offline; such as refunds, new customer registration, adding items, and few other restrictions.

When you make sales in offline mode, all of your receipts are stored locally in the device memory. If you go to the Receipt section you will see the receipts list. The receipts that were made in offline mode are marked as "Unsynced."

1



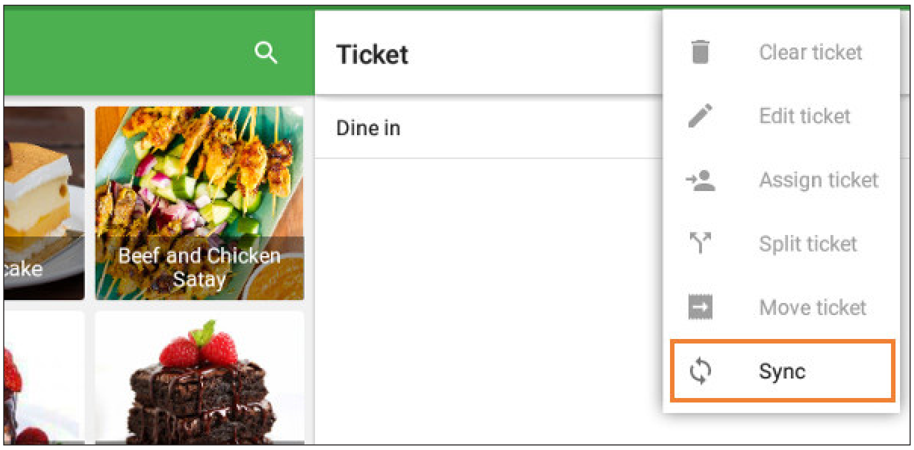
Note

- If you sign out while your device has been disconnected from the Internet, you will lose your receipts made in the offline mode. Therefore, before logging out from Loyverse POS, make sure that all of your receipts have been transferred to the Back Office.

- You will not see all the offline sales in the Back Office. After the device restores connection to the Internet, receipts will be automatically synced with Loyverse Back Office.

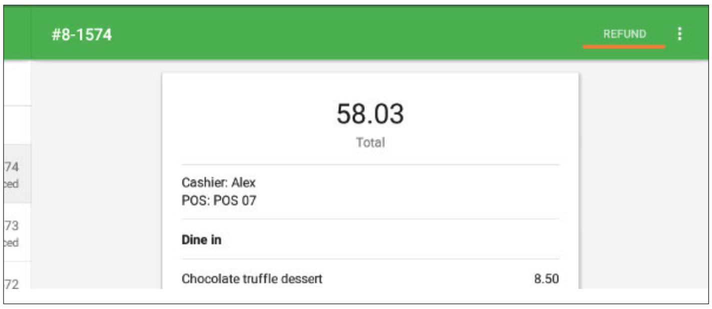
You can also tap the sync button in the three dots menu to sync data with the Back Office manually. If you do this in offline mode, you will get 'No internet connection' message.

2



Refund button is not active in the offline mode, so you cannot perform refunds.

3



You cannot register new customers or edit the existing customers, but you can add to the ticket recently registered customers.

The open tickets work in offline mode but without synchronization with other devices.
Email receipts are sent to customers only after the connection to the Internet is restored.

Other restrictions of the offline work

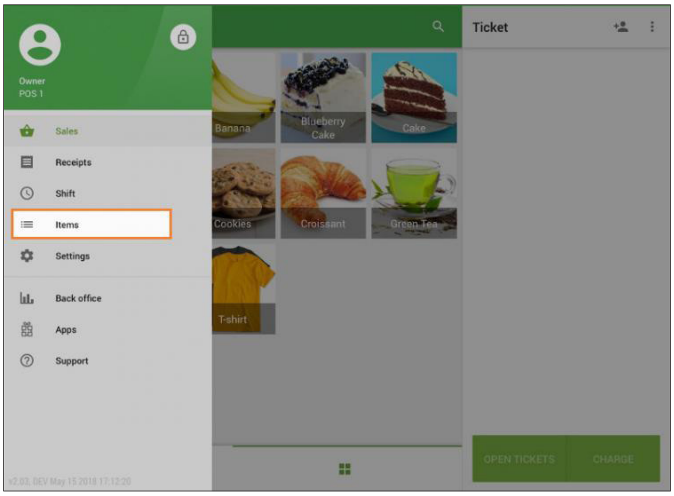
If you have connected integrated card processing terminals they will not work offline.
Items stock will not be displayed, as well as negative stock alerts; even if this option is enabled in the Back Office.

3. Items

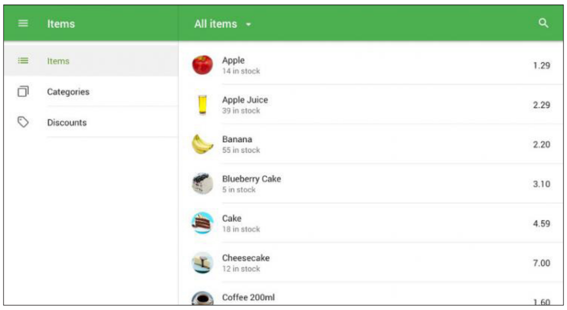
3.1 Working with the Items List in the POS

Go to the ‘Items’ section of the menu.

1

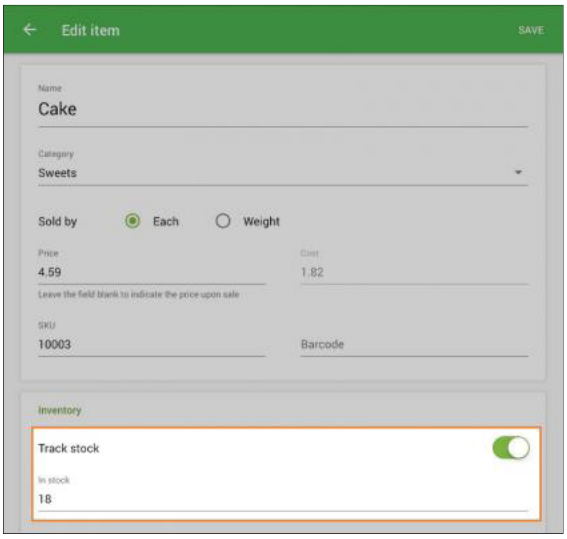


2



You will see the items list with the current amount of stock under each item name. Items whose ‘Track stock’ option is switched off will be displayed with the dash symbol ‘-’.
To change the quantity in stock, tap on the desired item from the list.

3



If you choose an item whose stock is not tracked, switch on the ‘Track stock’ option in the Inventory section. Type the number in the ‘In stock’ field.

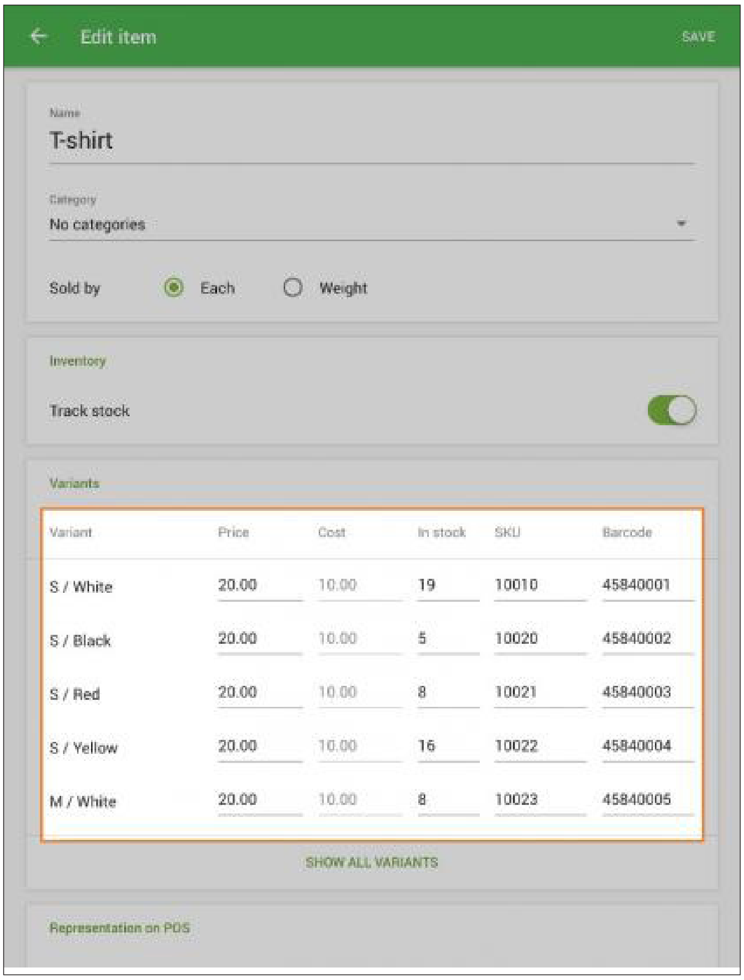
You can also change or enter the number into the ‘Cost’ field.

Note

If the option ‘Track stock’ is on for the item and you have active [Advanced inventory management subscription](), the Cost field will not be active but calculated automatically as the Average cost.

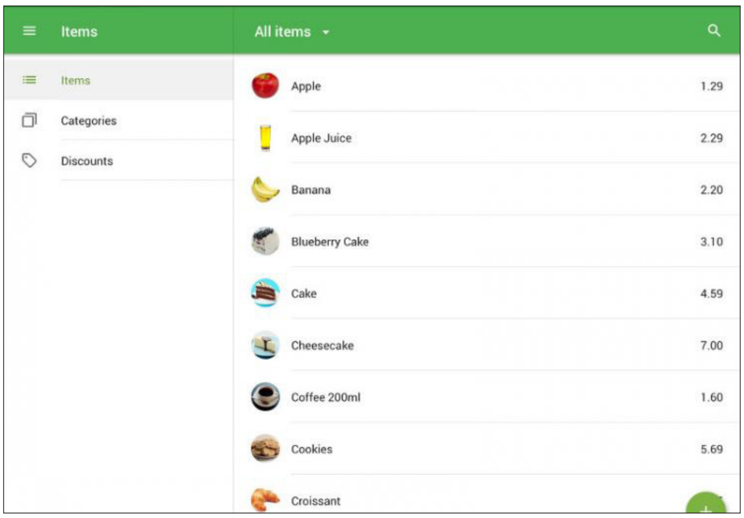
For items with variants, you can specify the stock and cost for each variant. In the item list, the sum of in-stock numbers of all variants will be displayed.

4



In the absence of an Internet connection (offline mode), the stock will not be displayed in the items list.

5

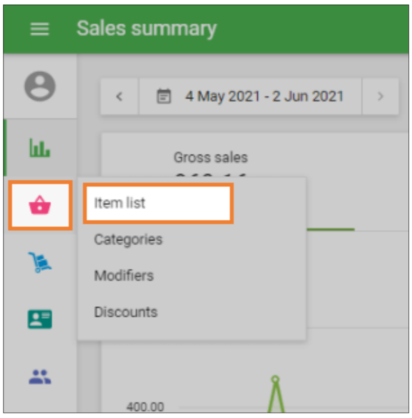


3.2 How to Add Barcodes to Items

Loyverse POS (Android, iOS) works with barcodes supported by your barcode scanner.

3.2.1 How to add item barcode in the Back Office

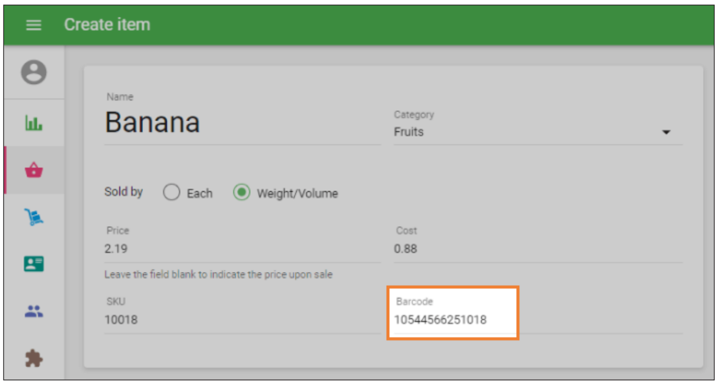
1



Go to the 'Item list' menu. Find your item and open it.

Find a barcode on your item and enter it into the Barcode field.

2



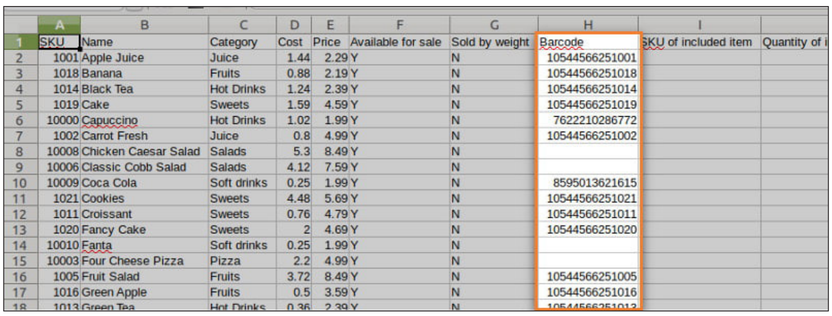
You can avoid manual entry by connecting a barcode scanner to your PC or tablet and simply scanning in the barcodes. Click the Barcode field and then scan the code from the item.

Note

Before scanning the barcode by scanner, make sure to activate the Barcode field by clicking on it.

You can also add barcodes by using the file import feature. Enter the barcodes into the Barcode column, save the file, and proceed to import.

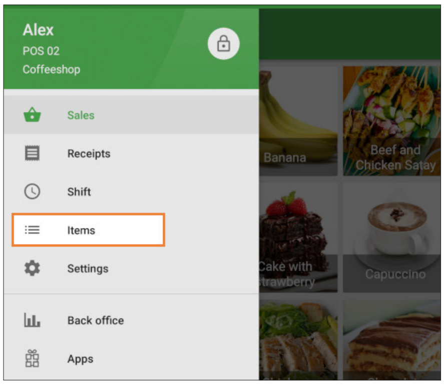
3



	A	B	C	D	E	F	G	H	I	
1	SKU	Name	Category	Cost	Price	Available for sale	Sold by weight	Barcode	SKU of included item	Quantity of i
2	1001	Apple Juice	Juice	1.44	2.29	Y	N	10544566251001		
3	1018	Banana	Fruits	0.88	2.19	Y	N	10544566251018		
4	1014	Black Tea	Hot Drinks	1.24	2.39	Y	N	10544566251014		
5	1019	Cake	Sweets	1.59	4.59	Y	N	10544566251019		
6	10000	Capuccino	Hot Drinks	1.02	1.99	Y	N	7622210286772		
7	1002	Carrot Fresh	Juice	0.8	4.99	Y	N	10544566251002		
8	10008	Chicken Caesar Salad	Salads	5.3	8.49	Y	N			
9	10006	Classic Cobb Salad	Salads	4.12	7.59	Y	N			
10	10009	Coca Cola	Soft drinks	0.25	1.99	Y	N	8595013621615		
11	1021	Cookies	Sweets	4.48	5.69	Y	N	10544566251021		
12	1011	Croissant	Sweets	0.76	4.79	Y	N	10544566251011		
13	1020	Fancy Cake	Sweets	2	4.69	Y	N	10544566251020		
14	10010	Fanta	Soft drinks	0.25	1.99	Y	N			
15	10003	Four Cheese Pizza	Pizza	2.2	4.99	Y	N			
16	1005	Fruit Salad	Fruits	3.72	8.49	Y	N	10544566251005		
17	1016	Green Apple	Fruits	0.5	3.59	Y	N	10544566251016		
18	1013	Green Tea	Hot Drinks	0.36	2.39	Y	N	[illegible]		

3.2.2 How to add item barcode in the Back Office

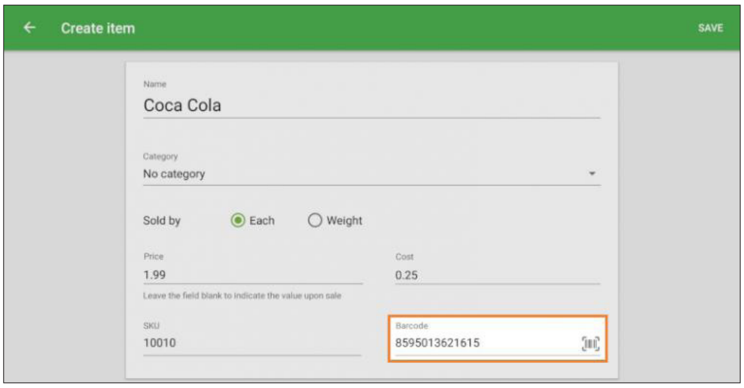
1



Tap the main menu (≡) button in the top left corner, then tap Items.

Open the item you want the barcode added to, and key in or scan the barcode into the Barcode field.

2



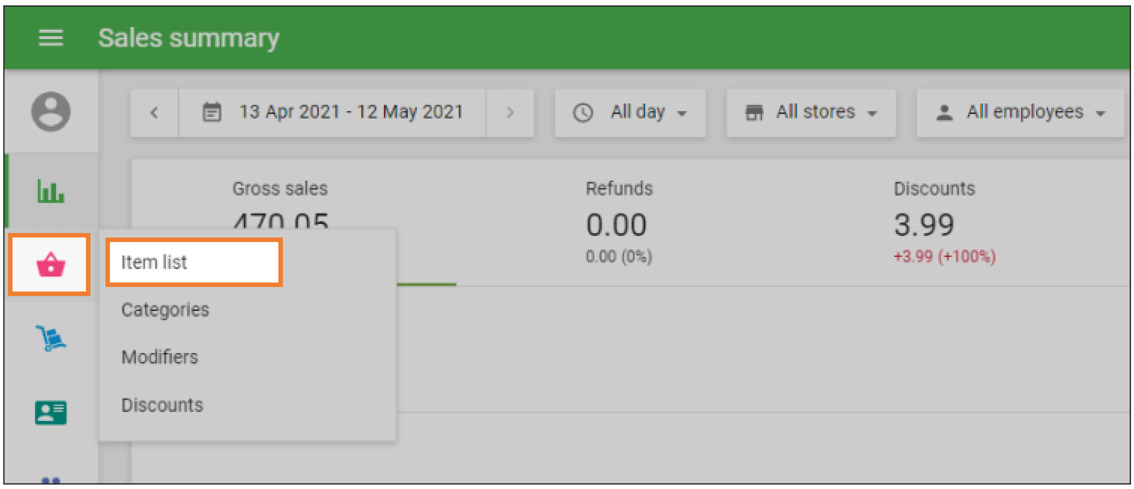
3.3 How to Use Variants of Items

The functionality of Variants allows you to condense the list of Items, simplifying their creation and management. This is a convenient tool to use if some products come in multiple versions, like different sizes or colors.

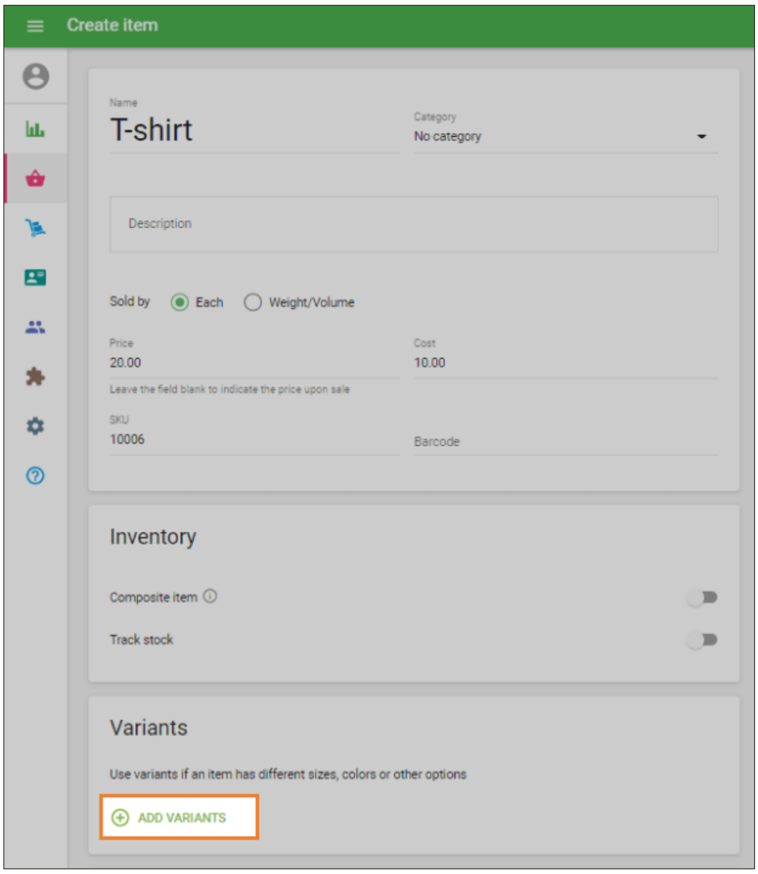
3.3.1 Creation and set-up of Variants

Go to the 'Item list' menu in the Back Office.

1



2



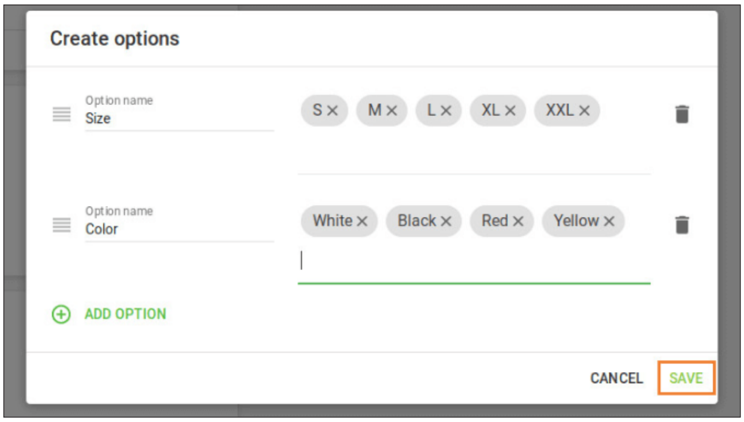
Open an already existing item for editing or create a new item. In the ‘Variants’ section, click on the ‘Add variants’ button.

3

Fill in the option name on the left field and the variants for this option on the right field. Press <Enter> button on your keyboard after each variant name to finalize the entry.

If necessary, create another option by clicking on the ‘Add option’ button. You can create up to 3 different options for each item. Don’t forget to save your variants.

4

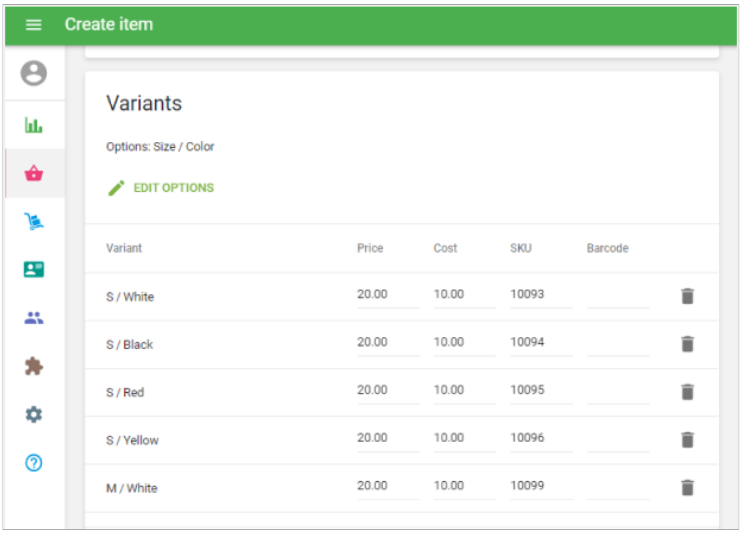


The system will form a list of all the possible variants of the item. There is a limit of 200 possible combinations of variants for one item.

The price and cost of the variants are automatically taken from the parent item. SKU is also generated automatically.

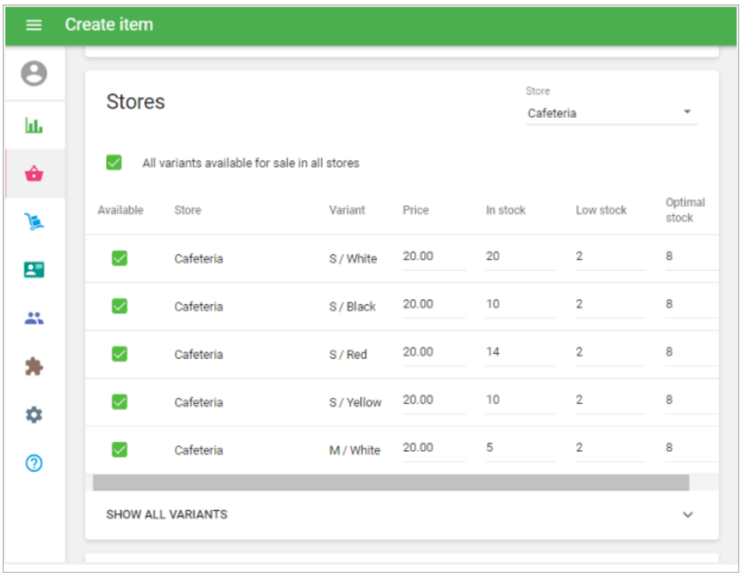
For each variant, you can manually correct all the fields: Price, Cost, SKU and add a Barcode.

5



If you have several stores, you can set up the price, in stock, and low stock of each variant for each store.

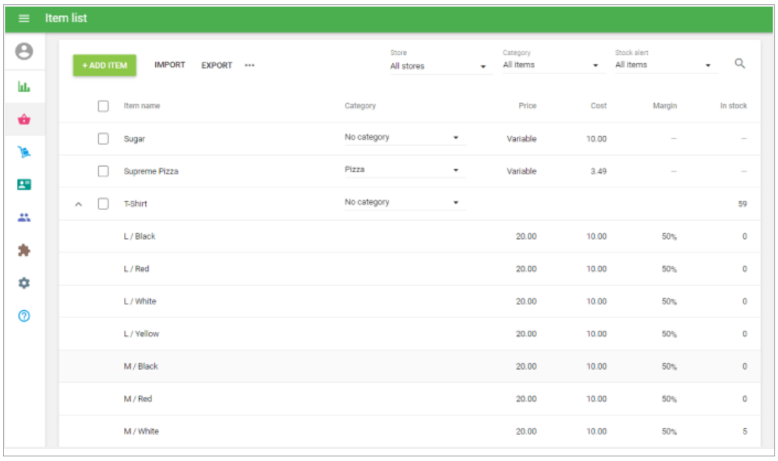
6



Don't forget to save the item.

You can see the item with variants in the item list.

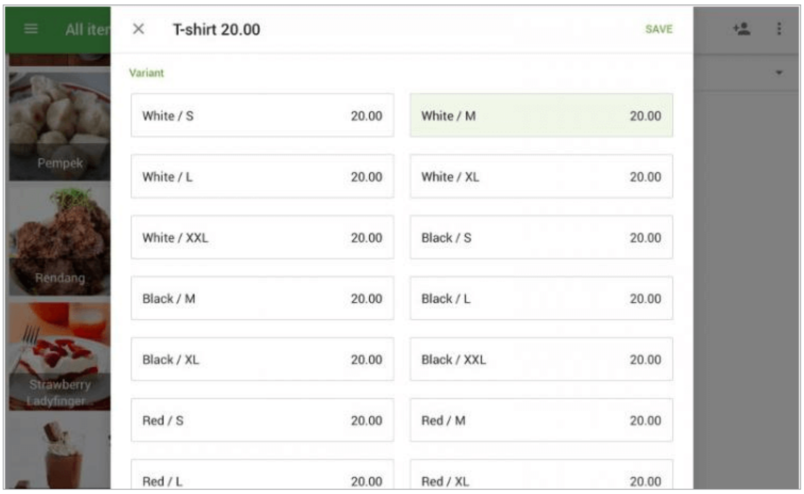
7



3.3.2 Variants at Sale and Report

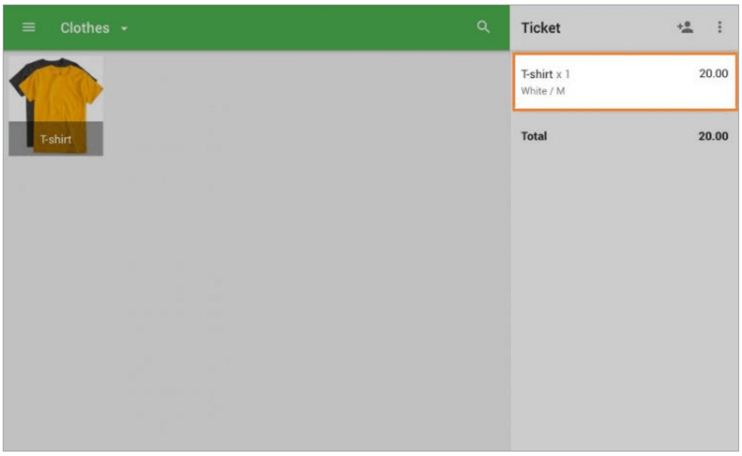
When selling from your mobile application, select the item with variants. A dialog box will open. Choose the desired variant of the item and click “Save”.

1



An item with the selected variant will appear on the ticket.

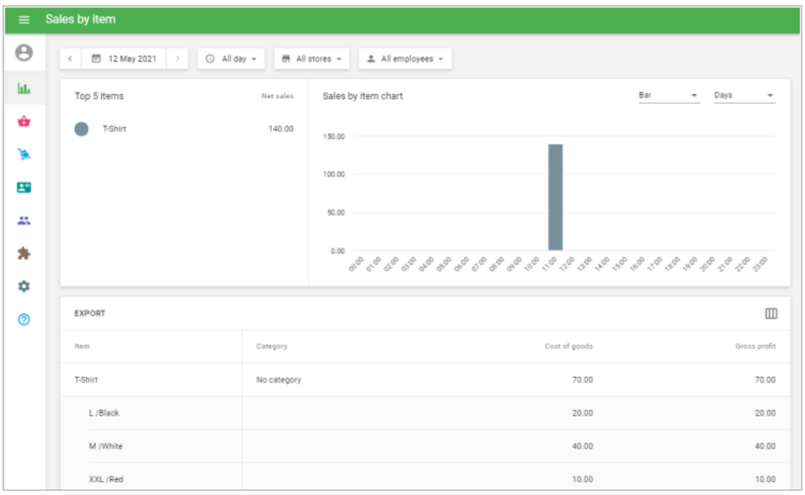
2



Then carry out the same steps as you would normally.

You can see the sales of variants in the Back Office in the ‘Sales by item’ section in the ‘Reports’ menu.”

3



3.3.3 Export-Import of Variants

It is easy to create variants of items by adding/editing item in the back office. But you can also import them through a file.
You can use the ‘Export’ and ‘Import’ button at the Item list in the back office as usual. However, there are some points you need to keep in mind.

Export your items with variants and open the CSV file.

1

A	B	C	D	E	F	G	H	I	
Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name	Option 2 value	Opt
t-shirt	10017	T-shirt	Clothes	N	Color	White	Size	S	
t-shirt	10020					White		M	
t-shirt	10027					White		L	
t-shirt	10037					White		XL	
t-shirt	10038					White		XXL	
t-shirt	10039					Black		S	
t-shirt	10040					Black		M	
t-shirt	10041					Black		L	
t-shirt	10042					Black		XL	
t-shirt	10043					Black		XXL	
t-shirt	10044					Red		S	
t-shirt	10045					Red		M	

You can see that each combination of a variant in the export file is displayed as a separate item with its own SKU.

The ‘Handle’ field should be the same for all variants of the same item.

Only the fields of the first item with variants have values. The fields that are common to all variants of the same item are left blank. You may also fill them with the same value, but if they have a different value, you will get an error message when importing.

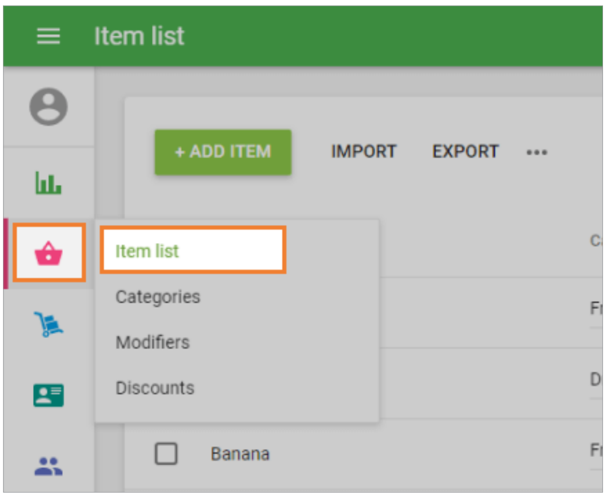
There are three columns each for ‘Option name’ and ‘Option value’. If some products have less than 3 options of variants, the extra fields are left blank.

Note

For items without variants, it is better to leave the ‘Handle’ field blank in the importing file. In this case, the system will automatically generate the handles for the new items

3.4 How to Create a Composite Item

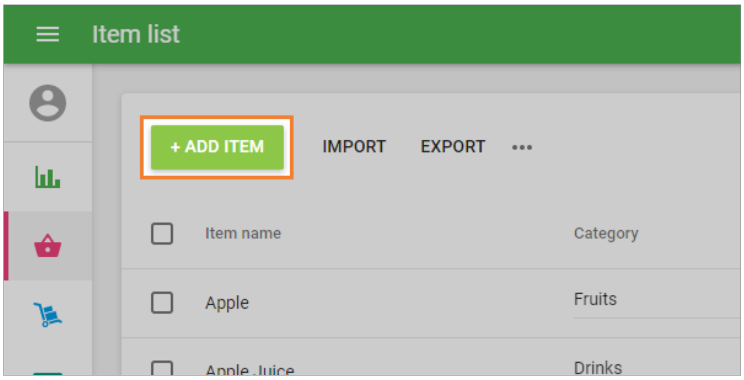
1



Composite items consist of a number of other items (components).

In the Back Office, go to ‘Item list’.

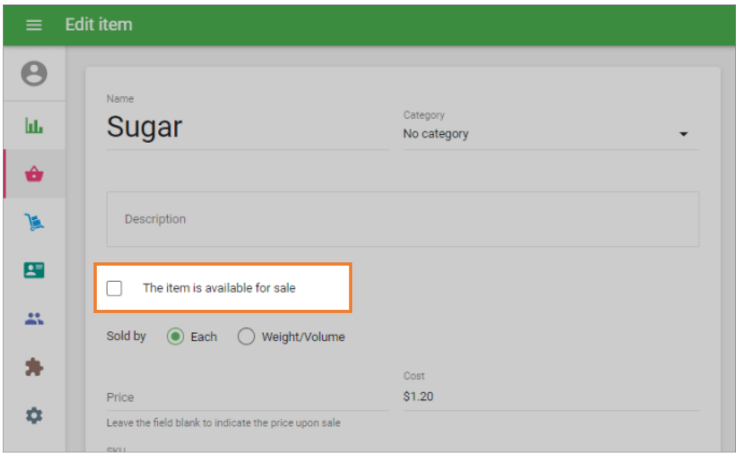
2



First, you have to create the components of a composite item.

Create them as you would ordinary items by clicking on 'Add Item' button.

3



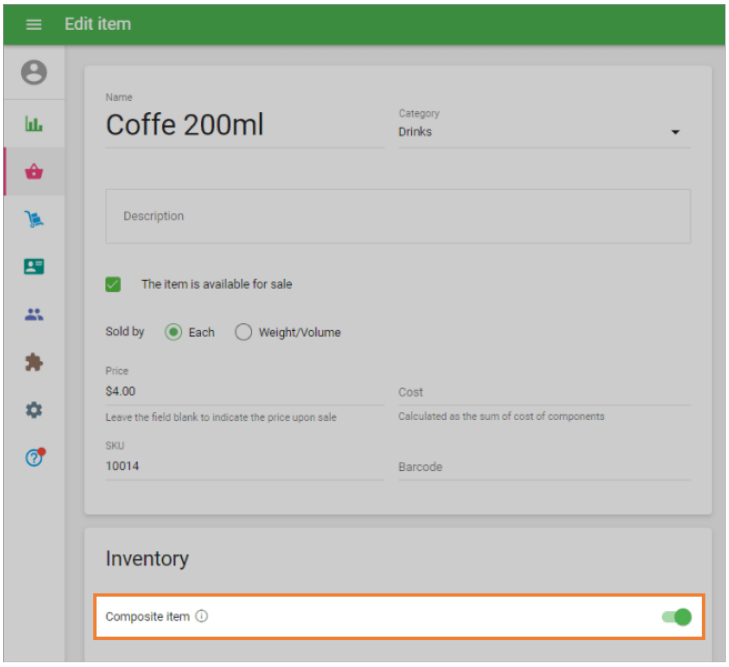
Give your item a name. If any component is not sold separately in your store, deselect the check-box 'The item is available for sale', so it will not be seen in the items list during sales.

Fill in the cost field and save the component item.
If the 'Track stock' is switched on, then, during the sale of a composed item, the components' stock will be reduced.

After you have all the components, you can create a composite item by clicking on 'Add Item' button again.

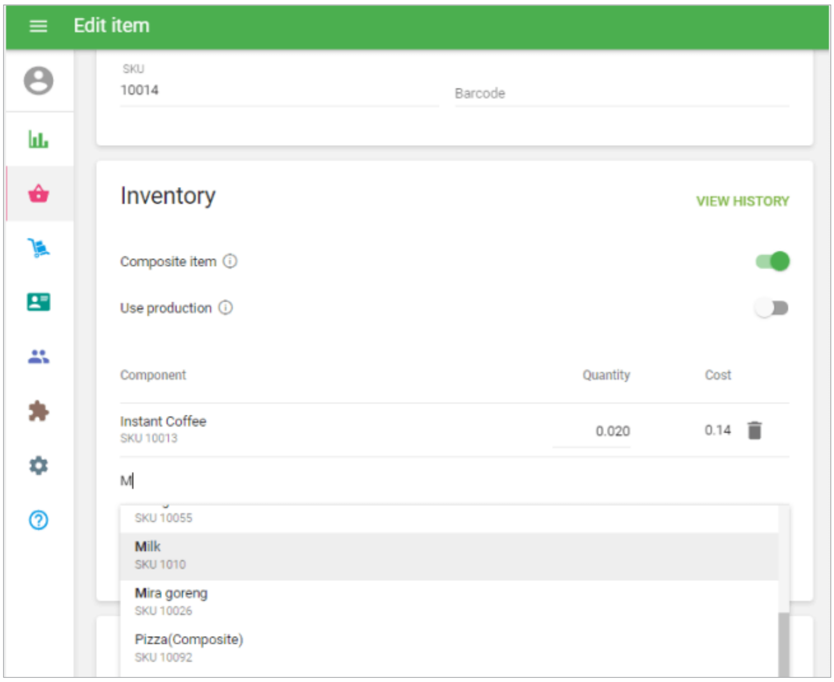
Then switch on the 'Composite item' option in the Inventory section.

4



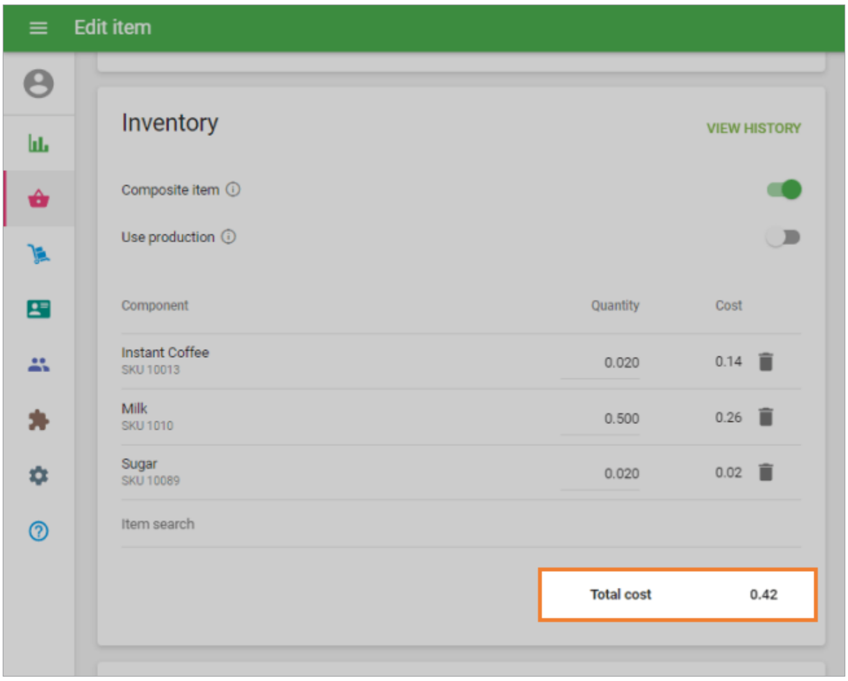
Add components one by one searching for them in the items list.

5



The composite item cost will be calculated based on the quantity and cost of all components.

6



All other parameters of composite items can be filled in as usual.

Don't forget to save your composite item.

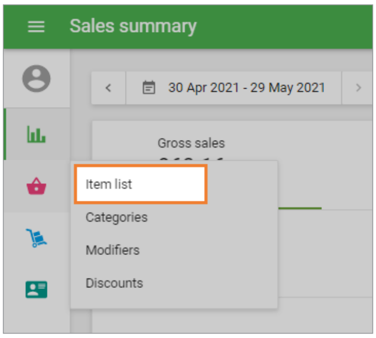
Note

The maximum nesting level for composite items is 3. If an item already has a third nesting level, then it is not displayed in the drop-down list when searching for components.

3.5 Notification About Low Stock

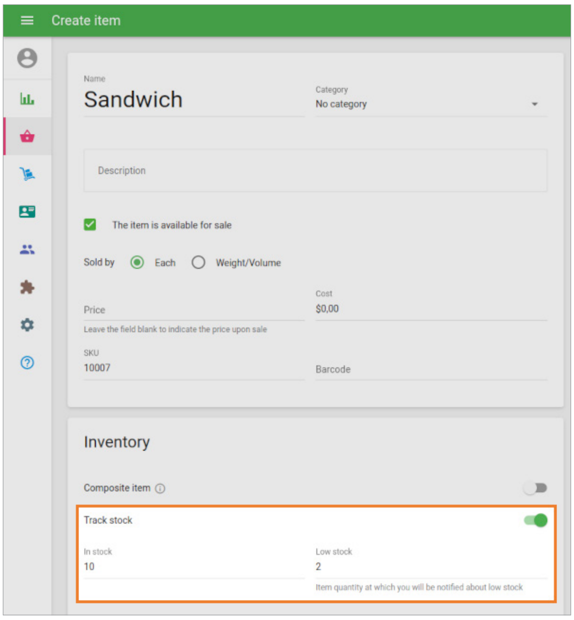
Do you want to keep track of products with low stock directly from your back office? And even better — to receive an email notification that the stocks of a product are coming to an end? Loyverse POS gives you such opportunity. Also, activation and the setting up of this function will take no time at all. You should complete just five simple steps.

1



Go to the 'Item list' menu in the Back Office.

2



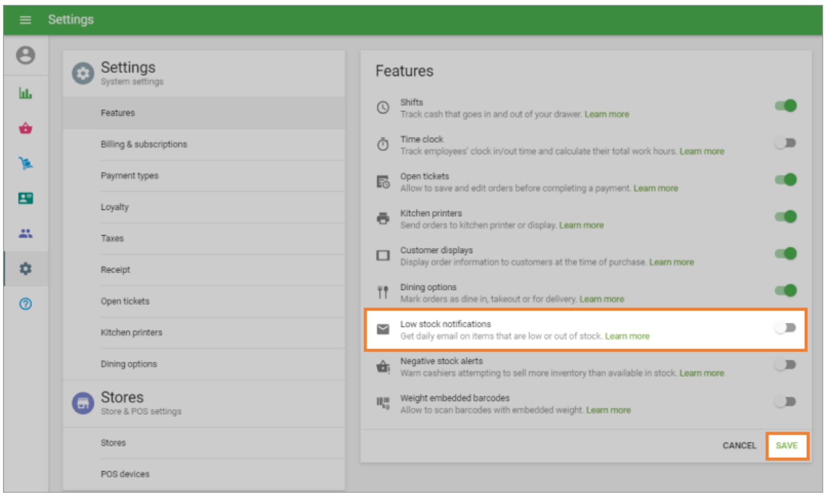
Open the necessary item to edit. Activate the option 'Track inventory', if it has not yet been activated. Under 'In stock', specify the item quantity that you have at the moment. In the field 'Low stock' enter the quantity at which you would like to be notified about the low stock.

Note

A record for a composite product is not kept. But you can set this function for each of its components.

Go to the 'Features' section in Settings. The option "Low stock notifications" is activated by default. If you have disabled this before, activate it again. Save your changes.

3



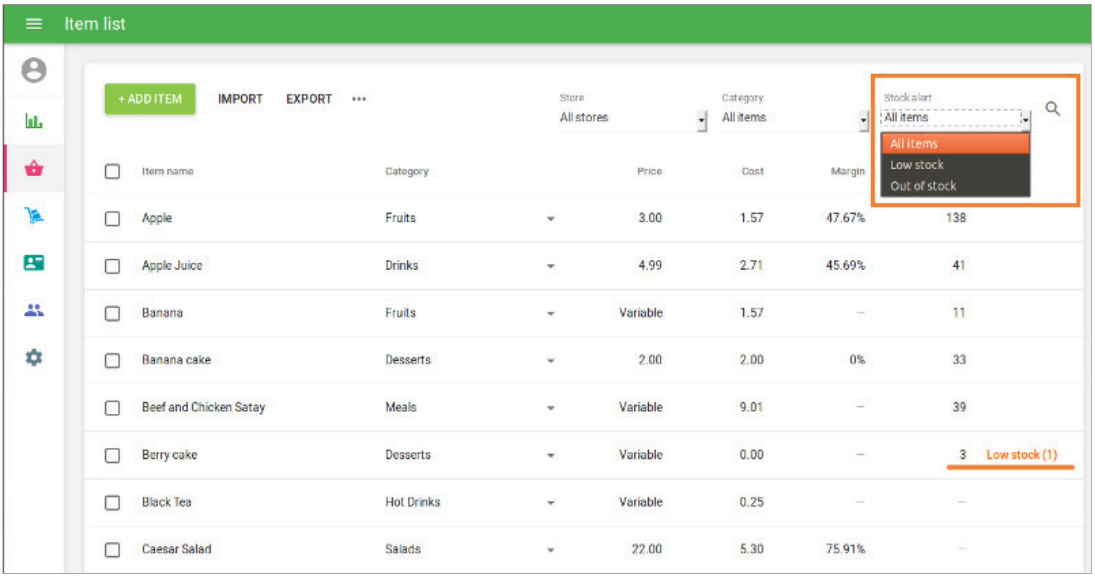
Note

Notification of low residue of an item or its complete absence will come to you by email at 10:00 in the time of zone that has been [specified in Account Settings](). If there are no items with low stock, no notification will be sent to you.

To view the current level of stock is possible without waiting till 10:00 go to “Item list” from the “Items” section. Here you will see the number of stock of each item, in the card of which you have selected the function “Track inventory”. If any item stock is low or it is not available at all, then next to the residue you will see a proper notification.

Additionally, you can use the filter “Stock alert” in the top right corner of the screen. Just open it and select the option: “All items”, “Low stock” or “Out of stock”.

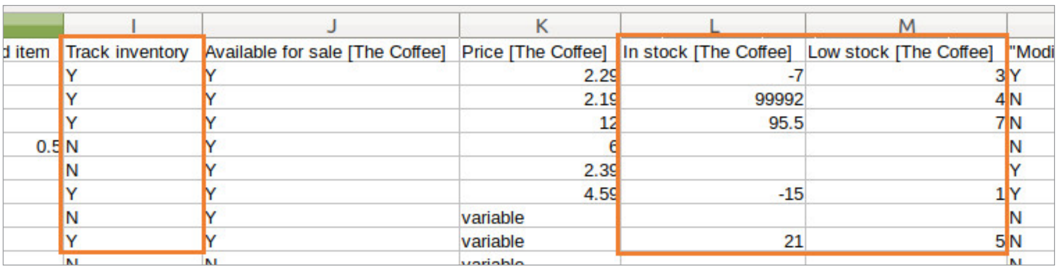
4



If you want to make batch changes in the inventory of your items you can do it through [import/export]() option. First, export your items at the ‘Item list’ section. Open your CVS file for editing.

In the ‘Track stock,’ column of the item set the value of ‘Y’ if you want to track inventory or ‘N’ if you don’t want. You can also set the number of items in stock in the ‘In stock’ field and low stock notification number in the ‘Low stock’ field.

5



	I	J	K	L	M	
d item	Track inventory	Available for sale [The Coffee]	Price [The Coffee]	In stock [The Coffee]	Low stock [The Coffee]	"Modi
	Y	Y	2.29	-7	3	Y
	Y	Y	2.19	99992	4	N
	Y	Y	12	95.5	7	N
0.5	N	Y	6			N
	N	Y	2.39			Y
	Y	Y	4.59	-15	1	Y
	N	Y	variable			N
	Y	Y	variable	21	5	N

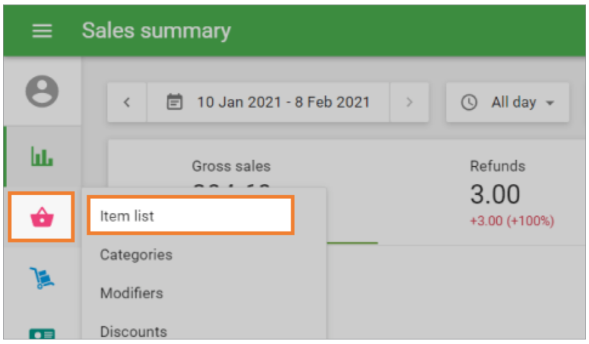
After editing file import it back to the system.

3.6 Exporting and Importing Items

It is easy to create items by adding them in the Back Office. But you can also import them through a CSV file at the Back Office.

To import your items smoothly and quickly, the correct sheet should be prepared. You can download the template, but the best way is to create sample items in the 'Item list', export them as a CSV file, and add all the rest of the items to the sheet.

1

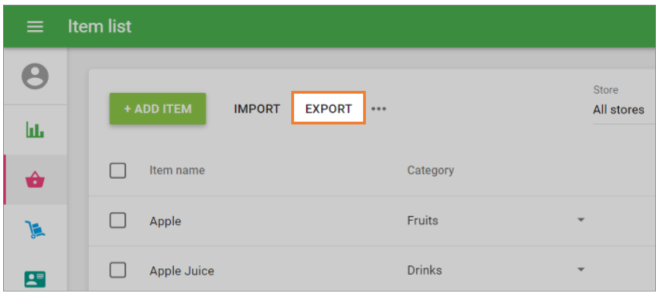


Let's start by adding a few sample items in the Back Office. Open 'Item list'.

Add the types of items that you are going to use in your store: composite items, items with variants, or just ordinary items. Fill in the parameters you are going to use with your items: track stock, in stock, low stock notification, price, cost, etc.

Add categories, modifiers, and taxes and apply them to your items. If you have several stores, do not forget to add these stores in the Back Office and set the item's availability for each store.

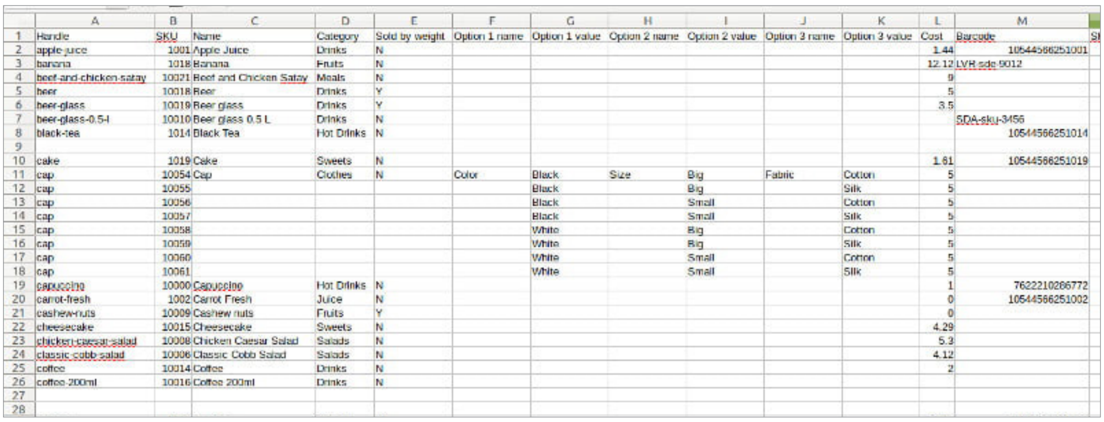
2



When you have a list of sample items, you can **export** them. Click on the '**Export**' button.

Open your CSV file (the best way is to open it from Google Sheets, but you can also use other tools). You will see the sheet with your sample items. You can use it to add other items you intend to import. Follow the pattern of your sample items when filling in the fields.

3



	A	B	C	D	E	F	G	H	I	J	K	L	M	
1	Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name	Option 2 value	Option 3 name	Option 3 value	Cost	Barcode	SI
2	apple-juice	1001	Apple Juice	Drinks	N							1.44	10544566251001	
3	banana	1018	Banana	Fruits	N							12.12	LVR-sde-9012	
4	beef-and-chicken-satay	10021	Beef and Chicken Satay	Meals	N							9		
5	beer	10018	Beer	Drinks	Y							5		
6	beer-glass	10019	Beer glass	Drinks	Y							3.5		
7	beer-glass-0.5-l	10010	Beer glass 0.5 L	Drinks	N								SDA-sku-3456	
8	black-tea	1014	Black Tea	Hot Drinks	N								10544566251014	
9														
10	cake	1019	Cake	Sweets	N							1.61	10544566251019	
11	cap	10054	Cap	Clothes	N	Color	Black	Size	Big	Fabric	Cotton	5		
12	cap	10055					Black		Big		Silk	5		
13	cap	10056					Black		Small		Cotton	5		
14	cap	10057					Black		Small		Silk	5		
15	cap	10058					White		Big		Cotton	5		
16	cap	10059					White		Big		Silk	5		
17	cap	10060					White		Small		Cotton	5		
18	cap	10061					White		Small		Silk	5		
19	capuccino	10000	Capuccino	Hot Drinks	N							1	7622210286772	
20	carrot-fresh	1002	Carrot Fresh	Juice	N							0	10544566251002	
21	cashew-nuts	10009	Cashew nuts	Fruits	Y							0		
22	cheesecake	10015	Cheesecake	Sweets	N							4.29		
23	chicken-caesar-salad	10008	Chicken Caesar Salad	Salads	N							5.3		
24	classic-cobb-salad	10006	Classic Cobb Salad	Salads	N							4.12		
25	coffee	10014	Coffee	Drinks	N							2		
26	coffee-200ml	10016	Coffee 200ml	Drinks	N									
27														
28														

Note

CSV (comma-separated values) format is where the fields are separated by commas, so avoid commas in your data.
For fields with money value, such as ‘Price’ and ‘Cost’, use only numbers — no currency symbols. The decimal separator must be a point.

3.6.1 Features of different types of items

There are some specific points you have to pay attention to when adding data for each type of items: ordinary items, composite items, items with variants, and multistore.

Ordinary items

1

	A	B	C	D	E	F	G	H
1	Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 nar
2	apple-juice	1001	Apple Juice	Drinks	N			
3	banana	1018	Banana	Fruits	N			
4	beef-and-chicken-satay	10021	Beef and Chicken Satay	Meals	N			
5	black-tea	1014	Black Tea	Hot Drinks	N			
6	capuccino	10000	Capuccino	Hot Drinks	N			
7	carrot-fresh	1002	Carrot Fresh	Juice	N			
8	cashew-nuts	10009	Cashew nuts	Fruits	Y			
9	cheesecake	10015	Cheesecake	Sweets	N			
0	chicken-caesar-salad	10008	Chicken Caesar Salad	Salads	N			
1	classic-cobb-salad	10006	Classic Cobb Salad	Salads	N			
2	coffee	10014	Coffee	Drinks	N			
3	coffee-200ml	10016	Coffee 200ml	Drinks	N			

Ordinary items — items that are not composite and does not have variants.
For items without variants, it is better to leave the ‘Handle’ field blank in the importing file. In this case, the system will automatically generate unique handles for the new items.

‘SKU’ is an obligatory field and should be unique for each item. The ‘Name’ is also an obligatory field.

Also, leave the columns of ‘Option name’ and ‘Option value’ blank because they are for variants of items.

Leave the column ‘SKU of included item’ blank because it is only for composite items.

Multiple stores

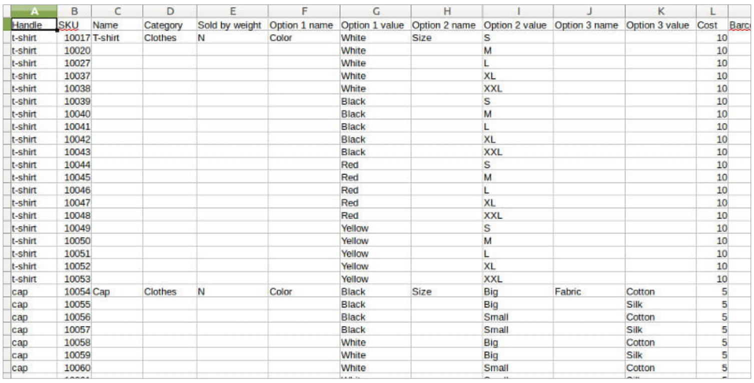
In case of you have multiple stores, you will have the following columns for each store: Available for sale, Price, In stock, and Low stock. Each of the 4 columns will have the store’s name in brackets next to it. For example, Available for sale [The Coffee] and Available for sale [Store 2]. So, you can set the values of these parameters for each of your stores.

2

	Q	R	S	T	U	V	W	X	Y
em	Track stock	Available for sale [The Coffee]	Price [The Coffee]	In stock [The Coffee]	Low stock [The Coffee]	Available for sale [Store 2]	Price [Store 2]	In stock [Store 2]	Low stock [Store 2]
	Y	N	2.29	21	2	N	2.29	10	2
	Y	Y	2.19	67	4	Y	2.19	15	4
	Y	Y	12.03	48	4	Y	12.03	17	4
	N	Y	5.3			Y	5.3		
	Y	Y	8	8	5	Y	8	16	5
	Y	N	15	12	0	N	15	14	0
	Y	Y	7	57	5	Y	7	65	5
	Y	Y	14	14		Y	14	55	
	N	Y	7.59			Y	7.59		
	N	Y	4			Y	4		
0.02		Y	2			Y	2		

Items with variants

3



Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name	Option 2 value	Option 3 name	Option 3 value	Cost	Barc
t-shirt	10017	T-shirt	Clothes	N	Color	White	Size	S			10	
t-shirt	10020					White		M			10	
t-shirt	10027					White		L			10	
t-shirt	10037					White		XL			10	
t-shirt	10038					White		XXL			10	
t-shirt	10039					Black		S			10	
t-shirt	10040					Black		M			10	
t-shirt	10041					Black		L			10	
t-shirt	10042					Black		XL			10	
t-shirt	10043					Black		XXL			10	
t-shirt	10044					Red		S			10	
t-shirt	10045					Red		M			10	
t-shirt	10046					Red		L			10	
t-shirt	10047					Red		XL			10	
t-shirt	10048					Red		XXL			10	
t-shirt	10049					Yellow		S			10	
t-shirt	10050					Yellow		M			10	
t-shirt	10051					Yellow		L			10	
t-shirt	10052					Yellow		XL			10	
t-shirt	10053					Yellow		XXL			10	
cap	10054	Cap	Clothes	N	Color	Black	Size	Big	Fabric	Cotton	5	
cap	10055					Black		Big		Silk	5	
cap	10056					Black		Small		Cotton	5	
cap	10057					Black		Small		Silk	5	
cap	10058					White		Big		Cotton	5	
cap	10059					White		Big		Silk	5	
cap	10060					White		Small		Cotton	5	

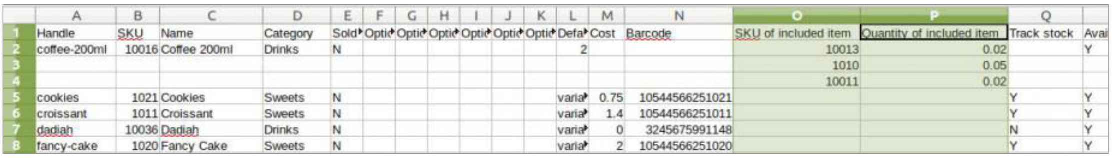
You can see that each combination of a variant in the export file is displayed as a separate item with its own SKU. Follow this pattern as a guideline for your items with variants.
The 'Handle' field is required for items with variants and it should be the same for all variants of the same item.

Only the fields of the first item with variants have values. The fields that are common to all variants of the same item are left blank. You may also fill them with the same value, but if they have a different value, you will get an error message when importing.

There are three columns each for 'Option name' and 'Option value'. If some products have less than 3 options of variants, the extra fields are left blank.

Composite items

4

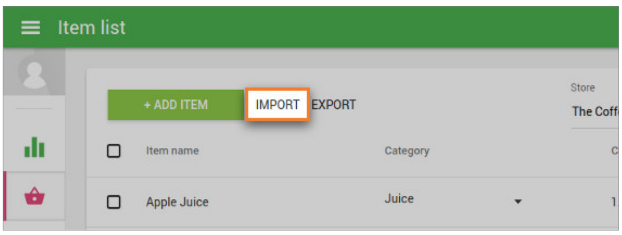


	Handle	SKU	Name	Category	Sold	Optic	Optic	Optic	Optic	Optic	Optic	Defa	Cost	Barcode	SKU of included item	Quantity of included item	Track stock	Avai
2	coffee-200ml	10016	Coffee 200ml	Drinks	N							2			10013	0.02		Y
3															1010	0.05		
4															10011	0.02		
5	cookies	1021	Cookies	Sweets	N							varia	0.75	10544566251021			Y	Y
6	croissant	1011	Croissant	Sweets	N							varia	1.4	10544566251011			Y	Y
7	dadiah	10036	Dadiah	Drinks	N							varia	0	3245675991148			N	Y
8	fancy-cake	1020	Fancy Cake	Sweets	N							varia	2	10544566251020			Y	Y

Each composite item includes several components. Specify SKU codes of all the included items (components) of the selected composite item in the field 'SKU of included item' on a separate row.
'Quantity of included item' — in this field, it's necessary to specify the quantity of the component that is included in one unit of the composite item.
You cannot track stock of composite items, so leave the fields that are related to stocks blank. Also, leave all the other fields of components blank except for the first row.

3.6.2 Import of items

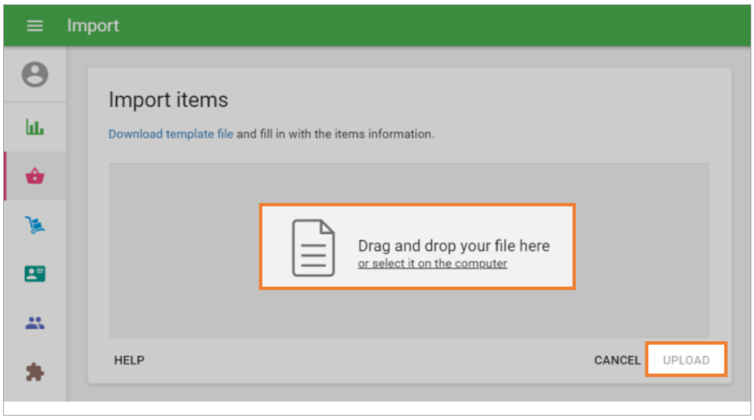
1



Click on the 'Import' button.

In the IMPORT menu, choose your CSV file from your computer and click ‘Upload’.

2



If you filled in the table without errors, you will be directed to an import confirmation window. There, you will see information on how many items and categories will be created or edited. Click ‘CONFIRM IMPORT’.

You will see a notification message that the list of items has been successfully updated. Click ‘OK’ and continue your work.

Import errors

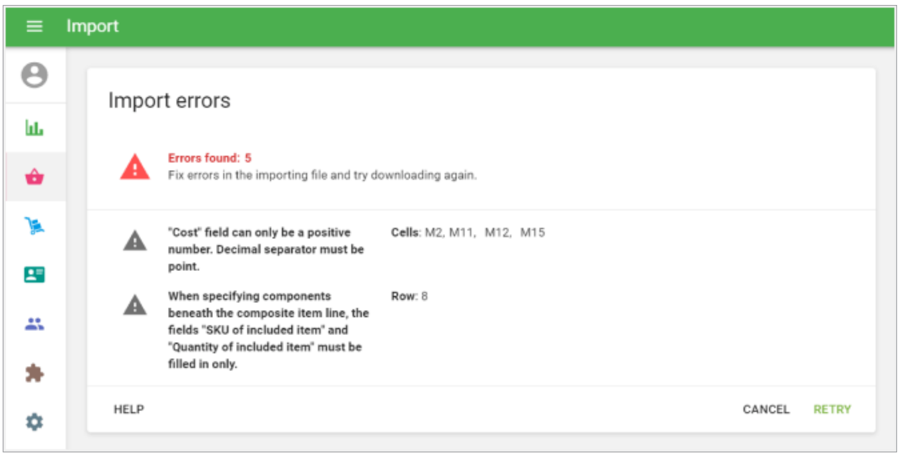
You may be faced with some errors when uploading the completed file. An error message will appear if:

- You changed the file format so that the file you are trying to upload is no longer in CSV format.
- The size of your file exceeds the admissible 5 MB.
- You edited names of columns that should have been left unedited.
- You have more than 10,000 items saved in your file.

In the next stage, you may be faced with import errors. In this case, the window with the corresponding message will open.

The critical errors are marked with a red sign. Each error has its explanation message and the place of the error: row, column, and cell. Fix all critical errors in the file and try to import the file again.
Warning messages have yellow signs. They are just for your information, and they will not stop your file from being imported.

3



3.6.3 The meaning of columns

Handle
A handle is an item identifier, which should be unique for each item. The ‘Handle’ field should be the same for all variants of the same item.

SKU
RSKU (Stock Keeping Unit) is a unique code given to each of your items. Specify and fill in each field individually. We recommend using the format ‘10001’, ‘10002’... etc. but the key point is that no numbers are repeated. One last condition is that the SKU should not exceed 40 characters.

Name
Fill in the names of each imported item in this field. You can use letters, digits, spaces, and any special symbols, as long as you use no more than 64 total characters.

Category
A category is a group to which an item belongs. For example, if you create the items ‘Cherries’, ‘Apples’, and ‘Oranges’, then you can put them into the ‘Fruits’ category.

Cost
Cost is the amount of money you paid to purchase the item. Here, specify the cost of the items only using digits — no currency symbols. Do not fill in the cost field for composite items. This will be calculated automatically as a sum of costs for each individual component.

Price
In this field, fill in the price at which you plan to sell the items. As with the ‘Cost’ field, enter only digits without currency symbols. If you want to specify the item price during a sale, leave this field empty.

Available for sale
Here, it’s only necessary to specify one character: ‘Y’ (Yes) – if the item is available for sale, or ‘N’ (No) – if it is not available.
It is important to note that if you ignore this field, then the item will be available for sale by default.

Sold by weight
If the item is sold by weight, enter ‘Y’ in the field, and if not, enter ‘N’. Again, if you do not fill in this field, the item will be sold by weight as default.

Option 1, 2, 3 name
These fields are for option names of the variants. Leave them blank for items without variants.

Option 1, 2, 3 value
These fields are for option values of the variants. Leave them blank for items without variants.

Barcode
If a barcode is available, then fill in this field with the item’s barcode digits.

SKU of included item
Each composite item includes several components. Specify SKU codes of all the included items (components) of the selected composite item here. Leave blank for non-composite items.

Quantity of included item
In this field, it's necessary to specify the quantity of the component that is included in one unit of the composite item. For example, for one portion of the composite item 'Americano with milk', you use 0.1L of the item 'Milk'. This means you should fill in the value 0.1 in the 'Quantity of included item' field nearby 'Milk'.

Track stock
If you would like to track the inventory of a selected item, enter 'Y' in the field and if not, enter 'N'. If you leave this field empty, then it will not track the inventory of that item.

In stock
If you would like to track inventory, then fill in an item's current quantity in this field, again only using digits. To avoid confusion with units (e.g., weight), we advise specifying them in brackets nearby the item name in the 'Name' field. For example, if you have 100 kg of potato in stock, then write 'Potato (kg)' in the 'Name' field and '100' under 'in stock'.
If you have selected the option 'Track stock', but did not specify a quantity, then the unit will automatically be zero.

Low stock
In this field, enter the quantity at which you would like to be notified about the low stock. Notification of low stock of an item or its complete absence will be sent to the owner's email at 10:00 A.M. in the time zone that you have specified. If there are no items with low stock, no notification will be sent to you.

Modifier — "Name of modifier"
Here, it's only necessary to specify one character: 'Y' (Yes) – if the item has a modifier, or 'N' (No) – if it is not available.

Tax — "Name of tax"
Here, it's only necessary to specify one character: 'Y' (Yes) – if the tax is applied to this item or 'N' (No) – if it is not applied.

4. Advanced Inventory

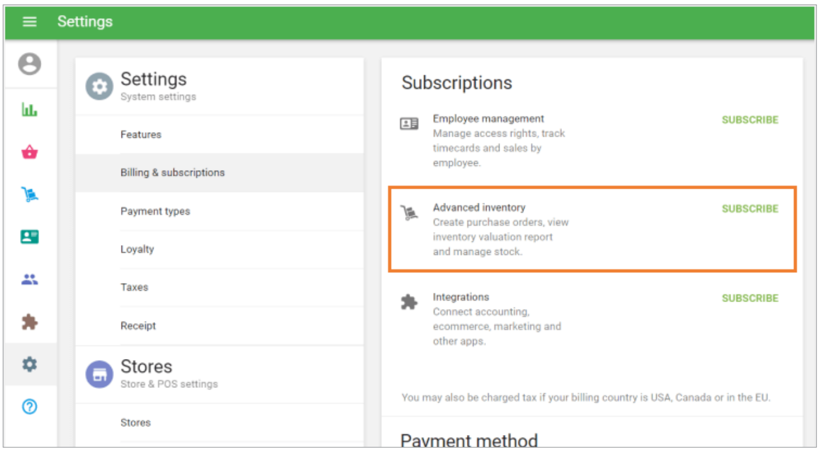
4.1 What is Advanced Inventory Management

The ‘Advanced inventory management’ includes a set of additional functions in the Back Office that allows users to more efficiently keep track of items in stock, monitor any changes in the inventory, and also launch a mechanism for more accurate calculation of business profitability indicators.

The ‘[Advanced inventory management](#)’ is only available in the paid subscription.

To activate subscription or a trial period, go to the ‘Billing & subscriptions’ section in the Settings menu of the [Back office](#).

1



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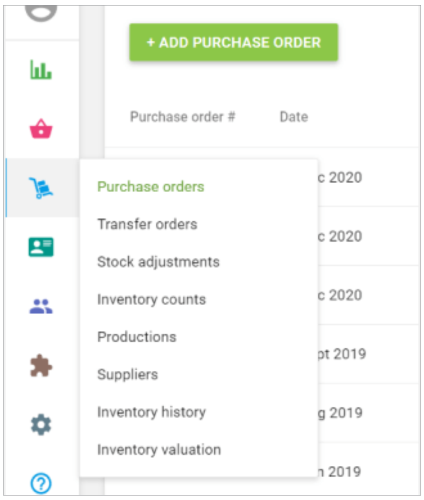


After activatiation, the ‘Inventory management’ menu will appear in the Back Office.

The ‘Inventory management’ menu includes:

[Purchase orders](#) — allows you to create and save orders for the supply of products, to send orders to suppliers, to receive products, and to save information of suppliers in the system.

[Transfer Orders](#) — allows a multiple store owner to distribute items correctly between his/her stores.

[Stock Adjustments](#) — allows you to modify the stock of items and indicate the reason for that adjustment.

[Inventory history](#) — allows the user to view records of all the changes made in the inventory, including transfers, purchase orders, and adjustments.

[Inventory Valuation](#) Report — gives an understanding of the total cost of the inventory and potential profits from their sale.

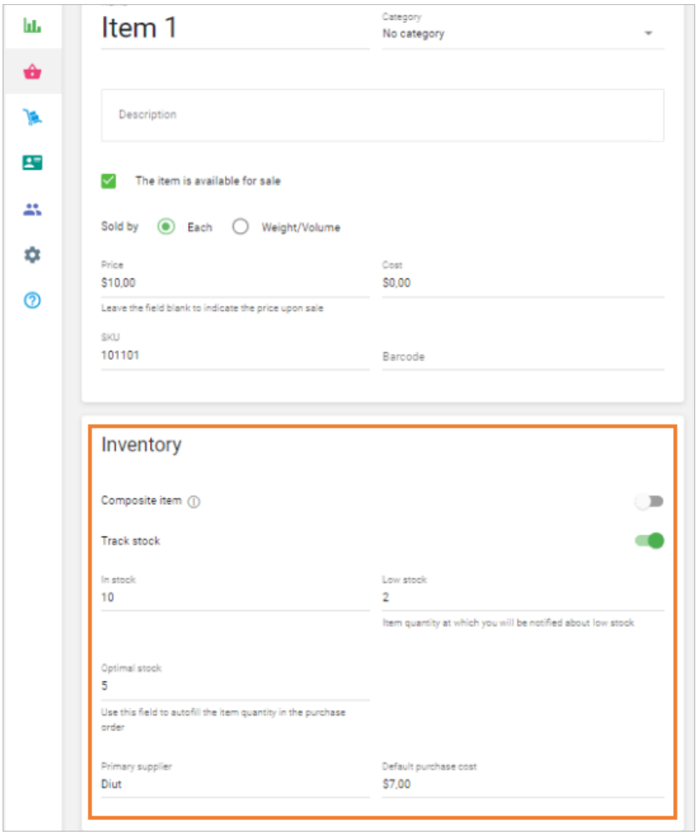
Inventory Counts — allows you to reconcile the expected and actual inventory for all or selected items, see the amount of inventory loss or surplus inventory, and keep documents for each inventory.

Print Labels — this button will appear in the Items list as a part of the Advanced inventory management. The label can contain the item's name, SKU, price, and barcode. Labels with a barcode allow you to use the scanner to add items to the ticket.

Productions — allows you to keep a record of the inventory of produced items, not just their components. It can be useful for items that are made in advance, not during ordering. For example, in a bakery. Produced items can be moved between stores by using inventory adjustments and inventory counts.

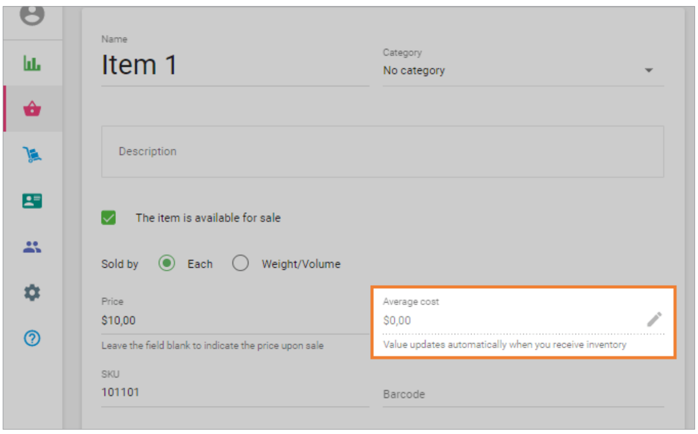
The Advanced inventory option alters the appearance of the Items form and the way items' cost is calculated.When you create a new item, you can fill in the Price and Cost as usual. However, when you switch on the 'Track stock' feature in the Inventory section, you will see additional fields that are only available with advanced inventory.

3



For 'Primary supplier', you can assign a certain supplier for the product from the list and set the 'Default purchase cost'.

4



After you save the changes and open the item for edit again, the 'Cost' field will be changed to 'Average cost' field. It will be calculated automatically when you receive items using the advanced inventory functionality.

The value of the item average cost after receiving new items (NewCost) is calculated as:

$$NewCost = \frac{(StockBefore \times CostBefore + StockAdded \times CostOfAdded)}{(StockBefore + StockAdded)}$$

Stock Before — stock before receiving new items

StockAdded — quantity of received new items

Cost Before — cost before receiving new items

Cost Of Added — cost of received new items

This value of the cost will be used in all the reports and calculations of all other values.

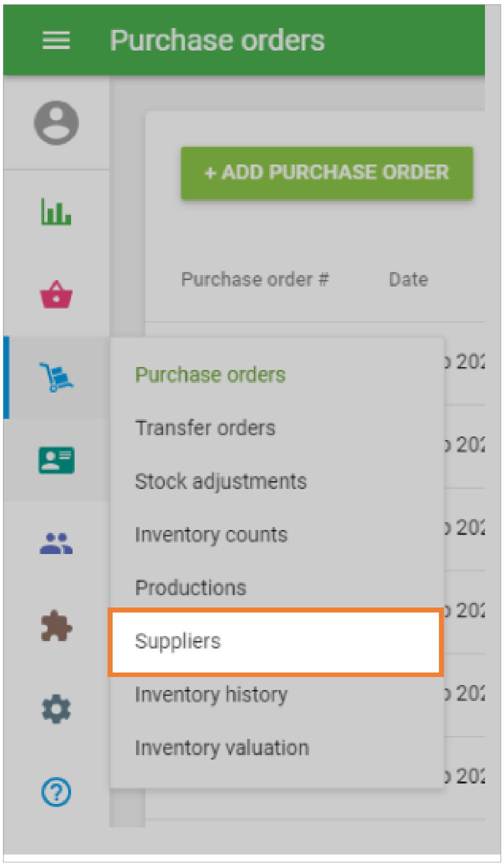
4.2 How to Work with Purchase Orders and Suppliers

'Purchase orders' is a part of the '[Advanced inventory management]' option and allows you to create and save orders for the supply of products, to send orders to suppliers, to receive products, and to save information of suppliers in the system. These options are available only to those users who have subscribed to this functionality.

4.2.1 Suppliers

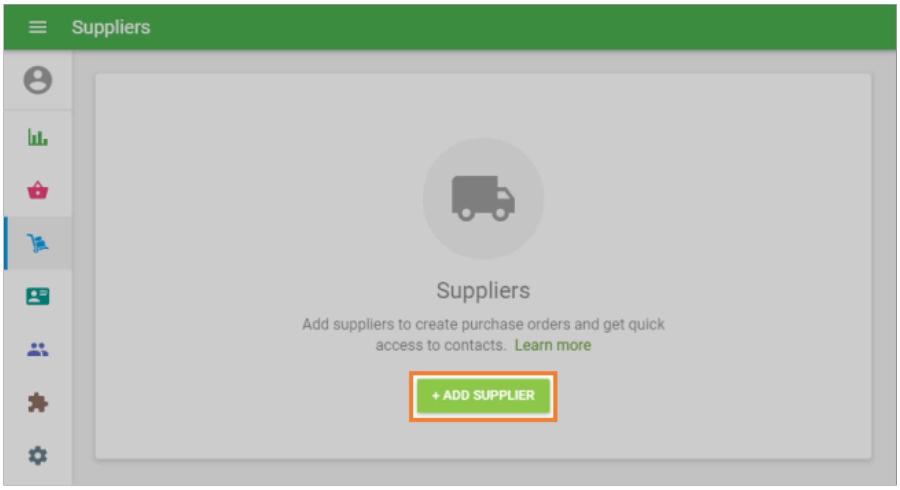
Go to 'Suppliers' section in the 'Inventory management' menu.

1



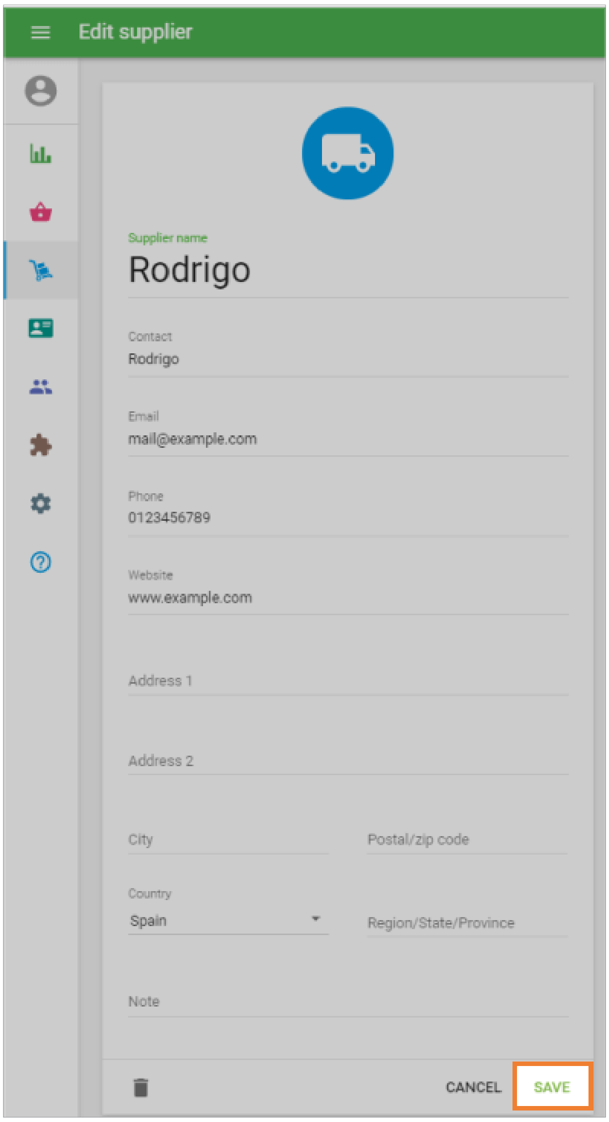
To create a supplier, click '+ Add supplier' button.

2



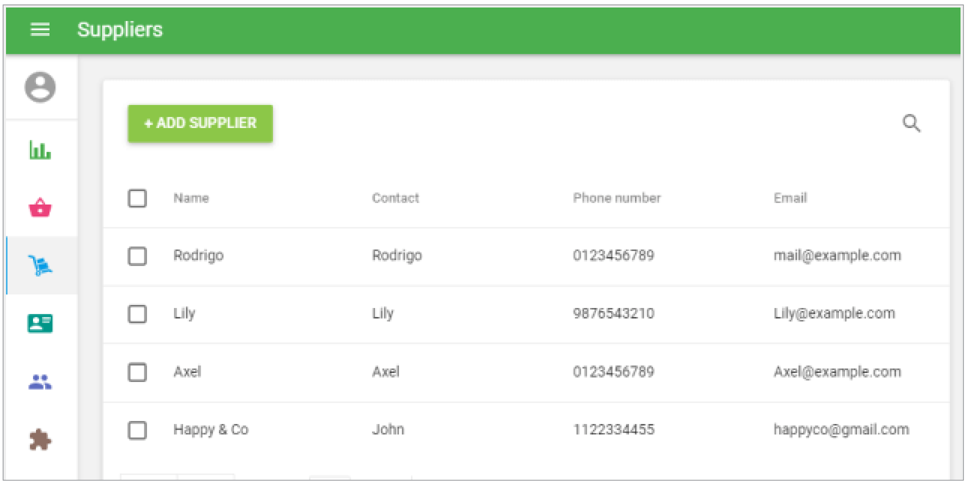
In the 'Create supplier' form, 'Supplier's name' is a required field and should be unique. The other fields are optional and can be left blank, but remember, that this information will be used to create the Purcha Order in the next step.

3



Don't forget to save supplier.

4



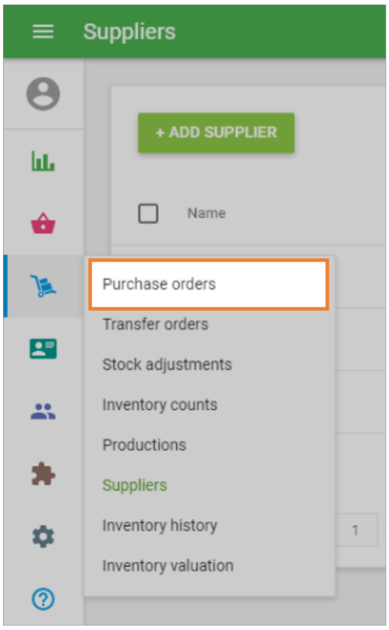
After you have created a list of your suppliers, you can start making purchase orders.

4.2.2 Making purchase orders

se

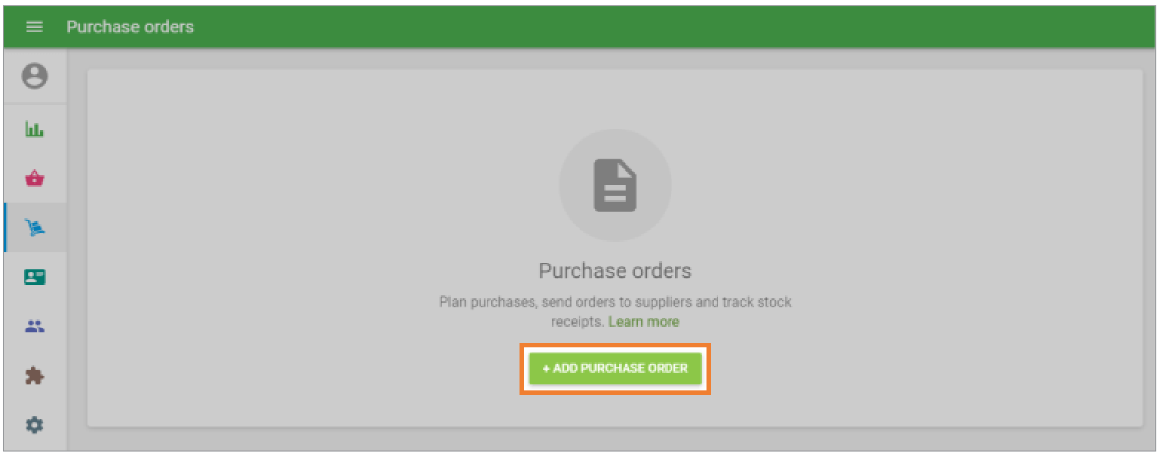
Go to 'Purchase orders' section in the 'Inventory management' menu.

1



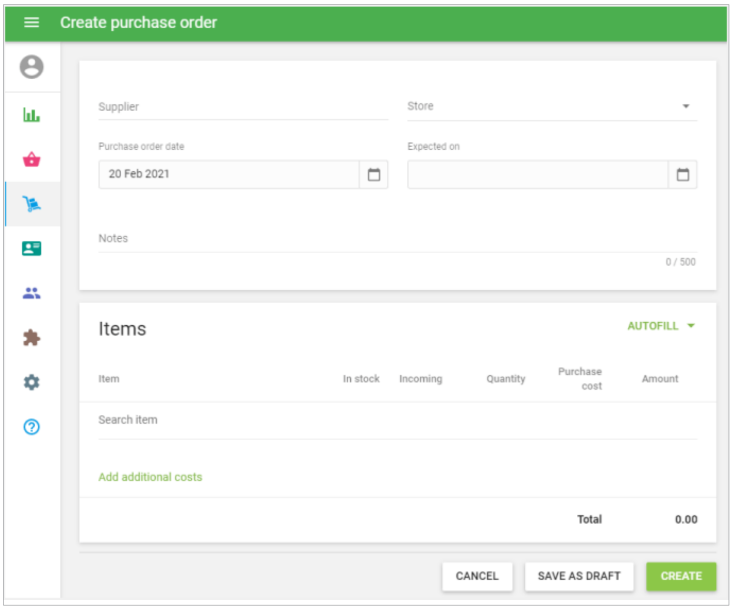
To create an order, click on '+ Add purchase order' button.

2



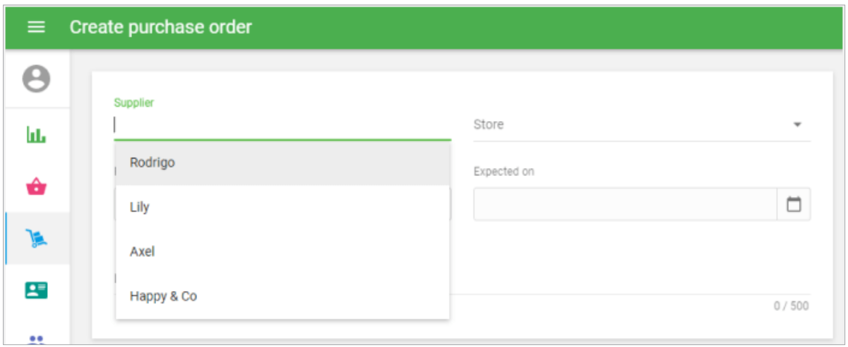
The form ‘Create purchase order’ will open for editing.

3



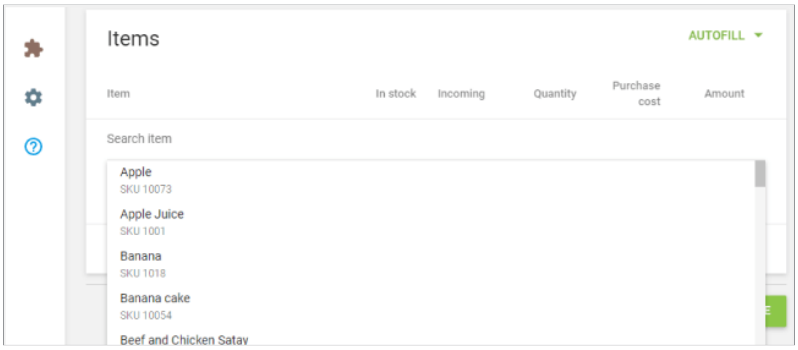
Choose the supplier from the ‘Supplier’ drop-down list.

4



You can set the ‘Purchase order date’ to the date you want the order to be put in. You can also set the date you expect your order to arrive in the ‘Expected on’ field and make notes for your order in the ‘Notes’ field.
In the ‘Items’ section, you can add items from the list of your items. If you click on the field, a drop-down list of your items will appear, and you can type in the item’s name, SKU or barcode to find the desired item.

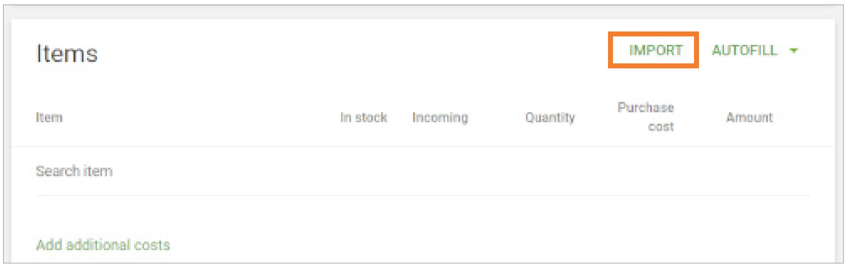
5



Fill in the ‘Quantity’ and the ‘Default purchase cost’.
You can add more items to the order in the same way as above.
The ‘Incoming’ fields indicate the expected quantity of items to be received based on all existing purchase orders but have not yet been received.

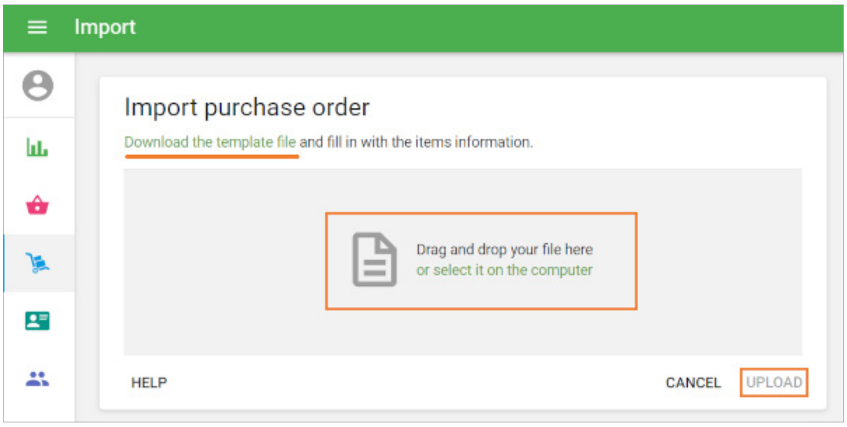
You can also import the items to the purchase order. For this, click on the Import button.

6



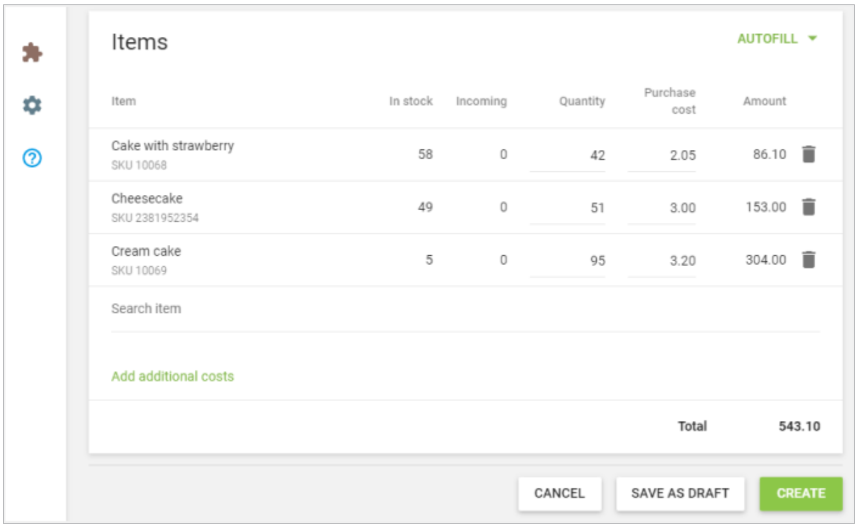
On the Import purchase order page, you can download the template CSV file to your computer. Then, fill it with the item's parameters such as SKU, Item name, Variant name, Quantity, and Purchase cost. Parameter SKU or Item name is required. Others are optional. After that, select the CSV file from your computer and click 'Upload'.

7



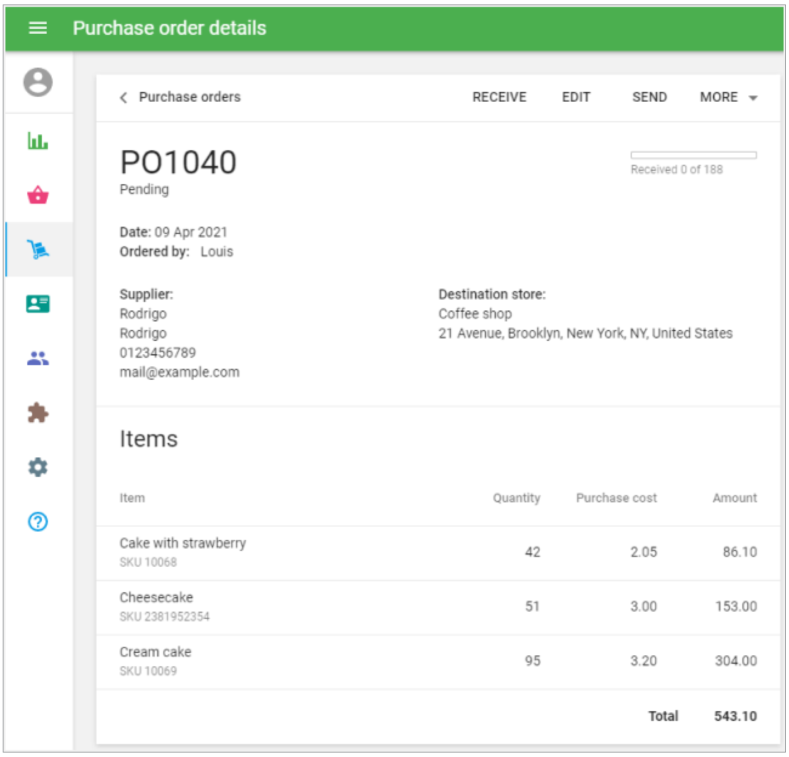
After forming the list of items and it's parameters, click on the 'Create' button to make a purchase order, or save it as a draft for further corrections.

8



Now your purchase order has been created.

9

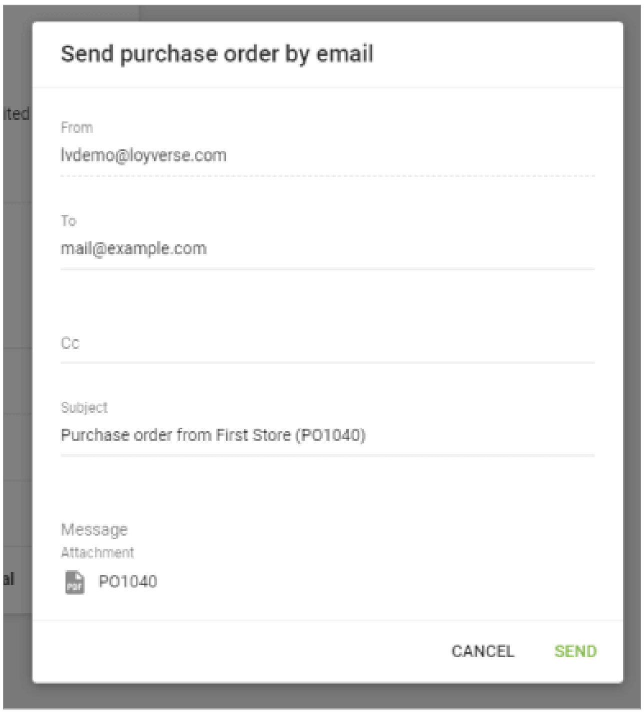


4.2.3 Actions with the purchase order

You can send your purchase order to your supplier. Click on the ‘Send’ button at the top. Fill out the email form and click the ‘Send’ button at the bottom.

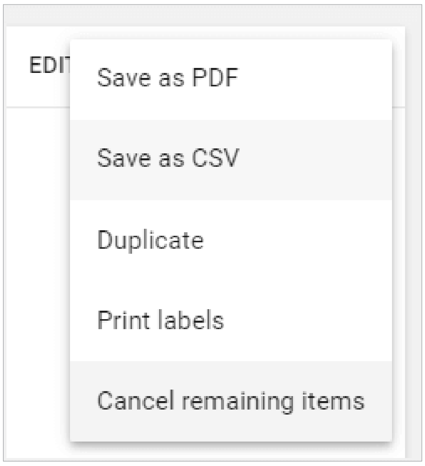
The purchase order will be sent to your supplier as an attached file.

1



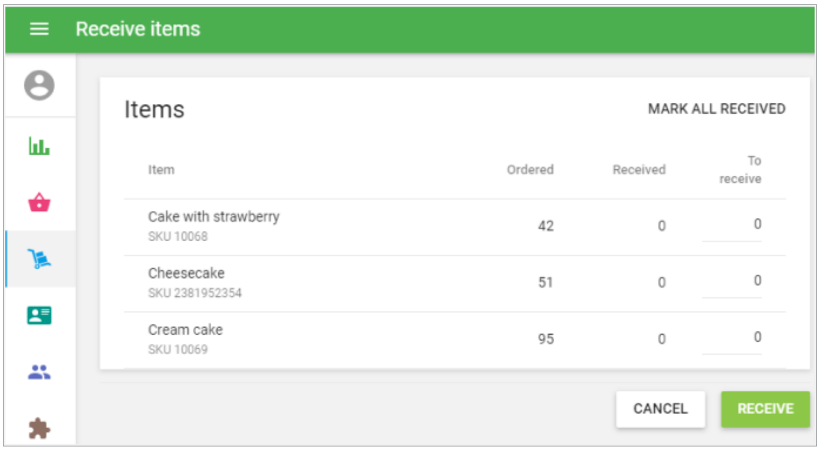
To edit the order, click on the ‘Edit’ button at the top.
There are additional operations available with the purchase order in the ‘More’ menu.

2



To confirm receiving an order, click on the ‘Receive’ button at the top.
You can put the number of items ‘To receive’ or ‘Mark all received’ and click on the ‘Receive’ button.

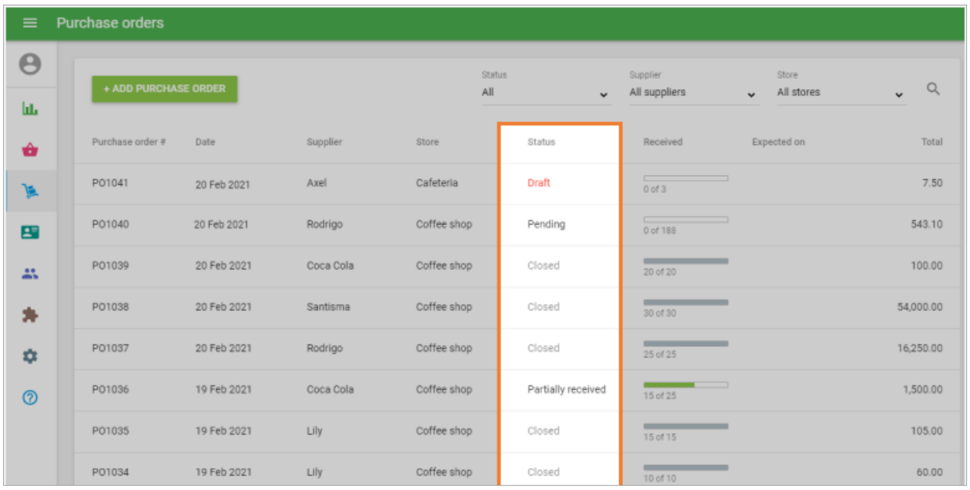
3



Afterwards, the stock of the received items will be updated according to the supplied amount. Also, the value of the average cost for each received item will be updated based on the ‘Default purchase cost’ specified in the order.

Purchase orders can have 4 different status: Draft, Pending, Partially received and Closed.

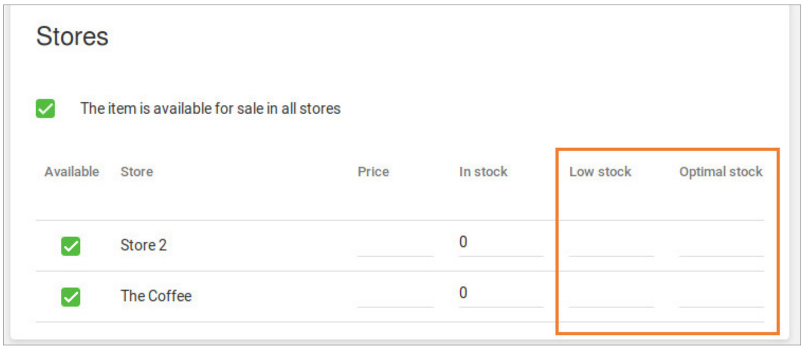
4



4.3 Autofill of the Items in the Purchase Order

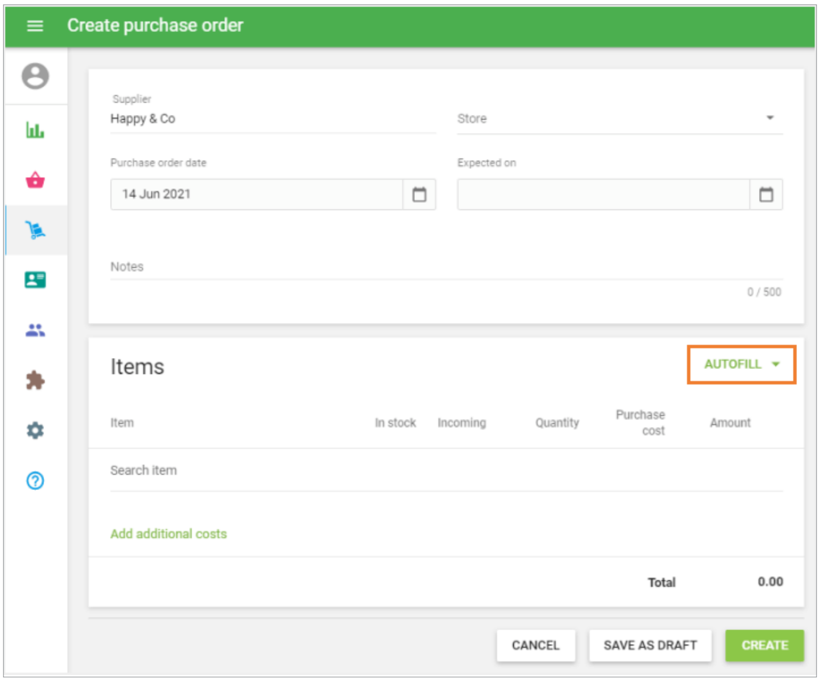
The autofill option allows you to add items to the purchase order in one click.
In the Items form, fill in the 'Low stock' and 'Optimal stock' fields.

1



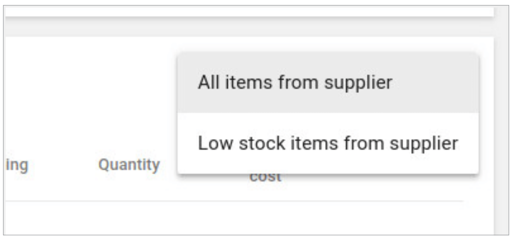
Open for editing the existing purchase order or create new.

2



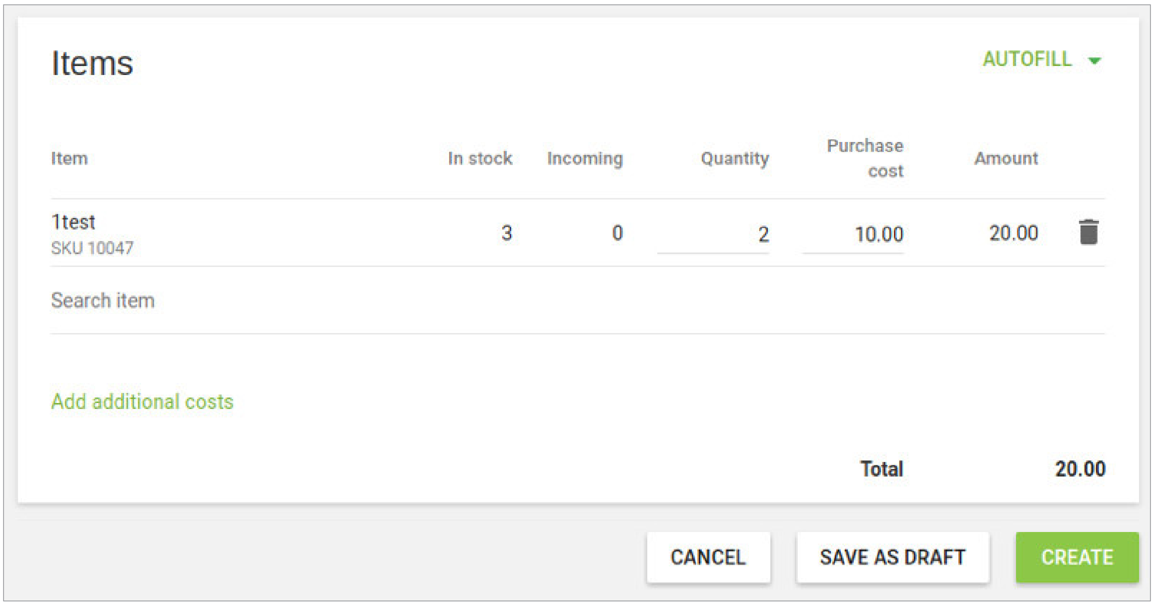
After selecting the Supplier and Store for your Purchase order, you can choose one of the autofill options between 'All items from supplier' or 'Low stock items from supplier'.

3



If you select the 'All items from supplier', the system adds all the items with the selected supplier specified in their attributes.
If you select the 'Low stock items from supplier', the system adds all the items with the selected supplier specified in their attributes which have a stock value that is less or equal to its 'Low stock' value.

4



The quantity field will be filled in with the default value, calculated by the formula:

Quantity = Optimal stock — In stock — Incoming

Optimal stock — the value of optimal stock set at the item's form in the selected store.
In stock — the current stock of the item in the selected store.
Incoming — the quantity of items that are expected at the selected store (the quantity of items not received in other purchase orders with the statuses "Expected", "Partially received", and transfer orders with the status "In transit").

For items whose 'Optimal stock' is blank, the 'Quantity' field will be empty.

You can change the default quantity with your value and proceed further with the purchase order.

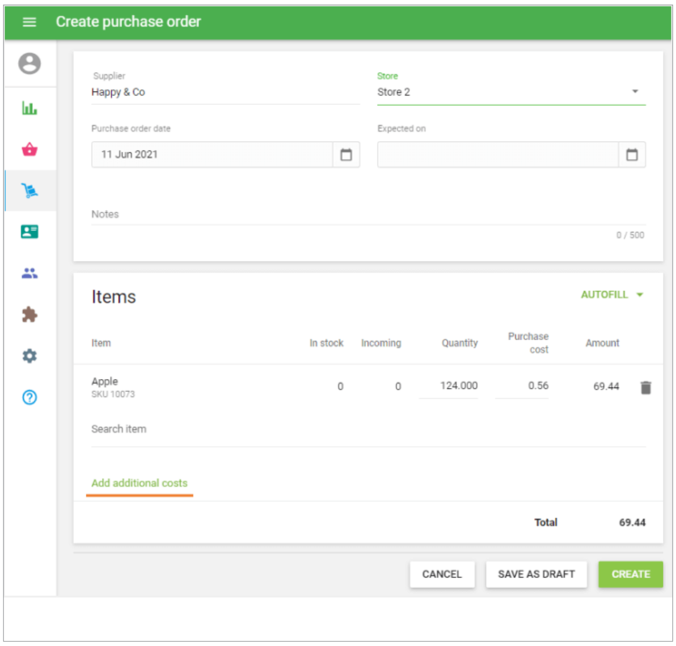
4.4 How to Work with Additional Costs in the Purchase Orders

When a retailer makes purchases, very often there are other expenses besides the amount of the ordered items. It can be the expenses for shipping, packaging, customs fee, and others. Thus, the total cost of goods can be higher than indicated in the order to the supplier.

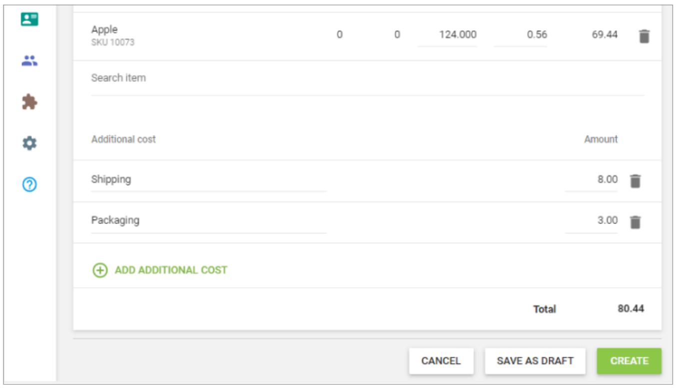
The possibility to specify additional costs in a purchase order allows you to take them into account in the final cost of goods and, therefore, obtain more accurate business profitability indicators.

Open the saved purchase order to edit or create a new one. Click 'Add additional costs' at the bottom of the order.

1

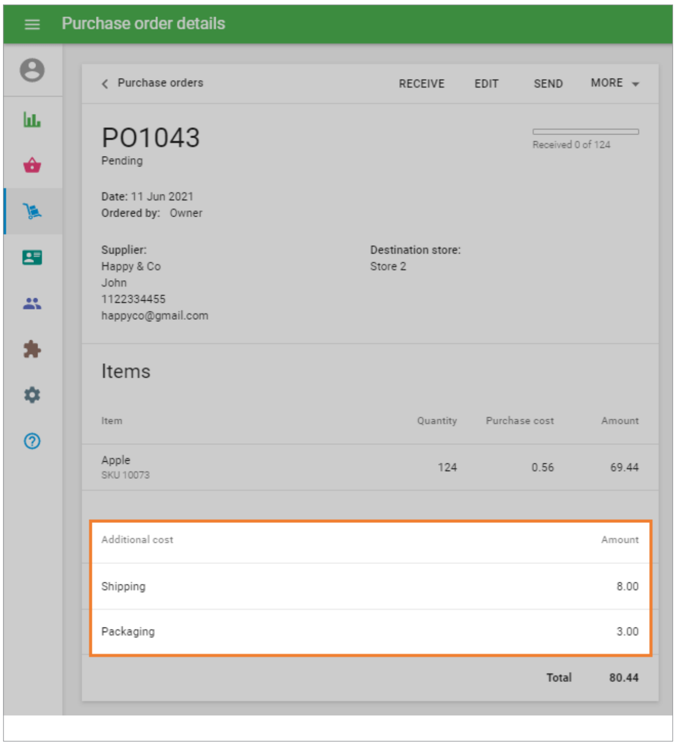


2



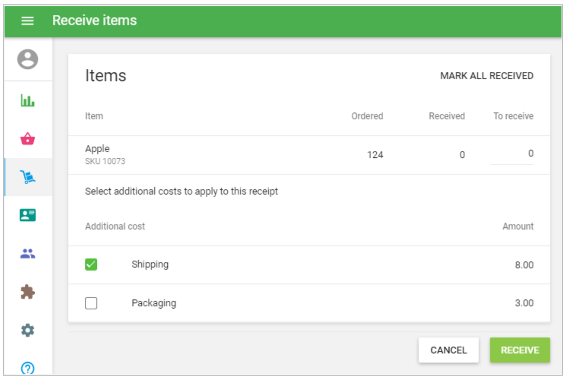
Fill in the ‘Additional cost’ name and ‘Amount’. The amount can also be a negative value, in case you receive a discount from your supplier. Click on the ‘+ Add additional cost’ button to add a new line for additional costs.

3



After saving or creating the Purchase order, you will see the additional cost section in the details of your purchase order with their amount added to the items amount to calculate the ‘Total’ of the order.

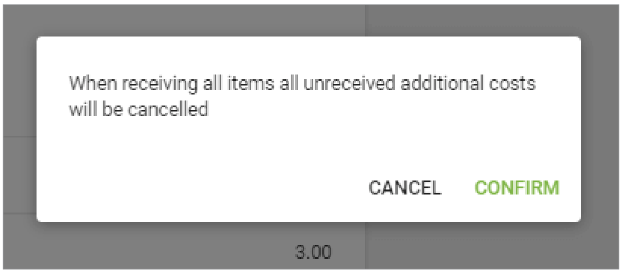
4



During the confirmation of receiving a purchase order, you can select which additional costs to take into account in the cost of the received items.

If you partially receive an order, you can apply the additional costs to only some of the items from the purchase order. In this case, the additional cost will be taken into account in the purchase price calculation of the selected item.

5

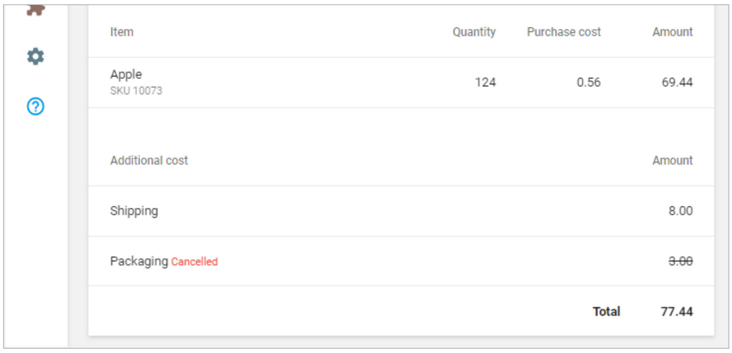


If you have no more items left and have unselected additional costs in the order, you will get the notification that all unreceived additional costs will be canceled.

Confirm your choice to proceed.

The unreceived additional costs will be marked as canceled in the received purchase order details.

6



After you have received the purchase order, the system calculates a new weighted Average cost for each item, taking into account the selected additional costs, in order to provide a more accurate calculation of the Total inventory value and Potential profit indicators in the 'Inventory valuation' report.

The total amount of the selected additional costs is distributed over all received items in proportion to the purchase cost of each item received in the order.
The final purchase cost of an item in an order, taking into account additional costs ***Cfinal***, will be calculated like this:

$$Cfinal = C1 * (1 + \frac{Costs}{Subtotal})$$

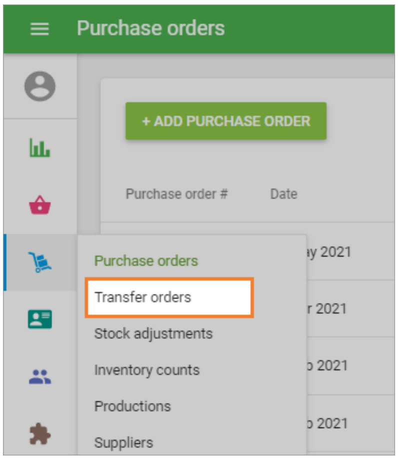
C1 — purchase cost of the received item
Costs — the total amount of the selected additional costs when receiving the purchase order
Subtotal — the total values of all items received in the order (without additional costs)

4.5 How to Work with Transfer Orders

Transfer Orders functionality allows a multiple store owner to distribute items correctly between his/her stores.

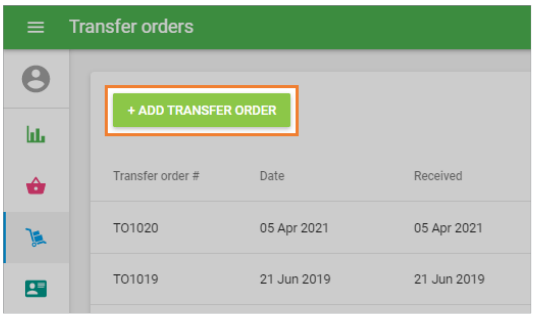
Transfer Orders is a part of the advanced inventory management and is available only to those users who have subscribed to this functionality.

1



Go to ‘Transfer Orders’ section in the ‘Inventory managment’ menu.

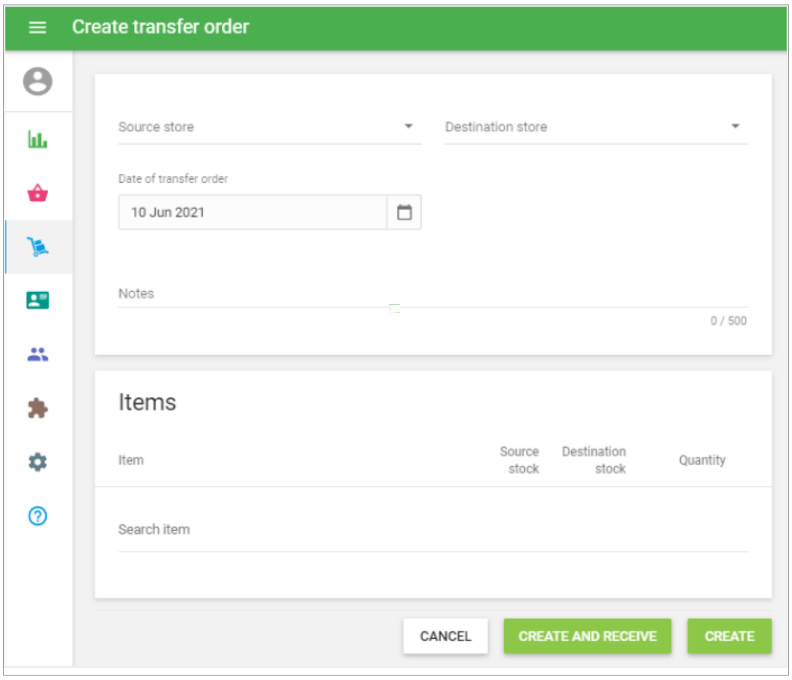
2



To create a transfer, click ‘+ Add transfer order’ button.

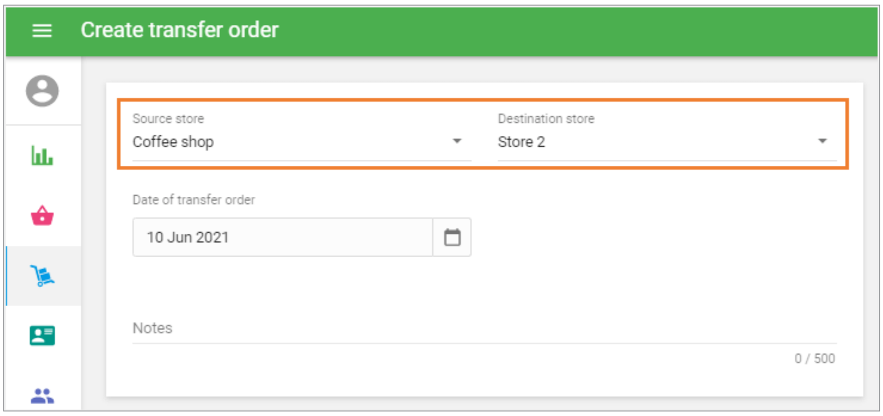
The form ‘Create transfer order’ will open for editing.

3



Choose ‘Source store’ and ‘Destination store’ from the drop-down list of your stores.

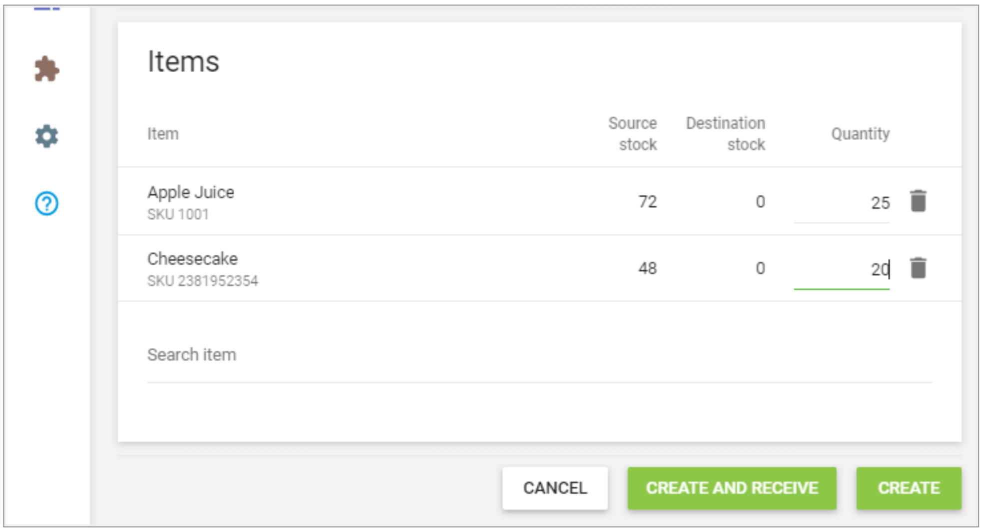
4



You can change the ‘Date of transfer order’, enabling you to schedule a transfer in advance or to record a transfer from the past. You can also make notes for your order in the ‘Notes’ field.

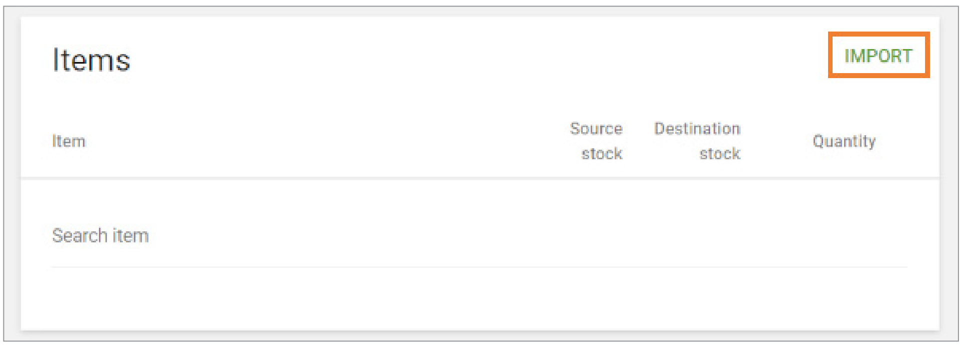
In the ‘Items’ section, you can add items from the list of your items with the track stock option on. You will see the stock information of the chosen items at the source and destination stores. Fill in the ‘Quantity’ field with the amount you would like to transfer.

5



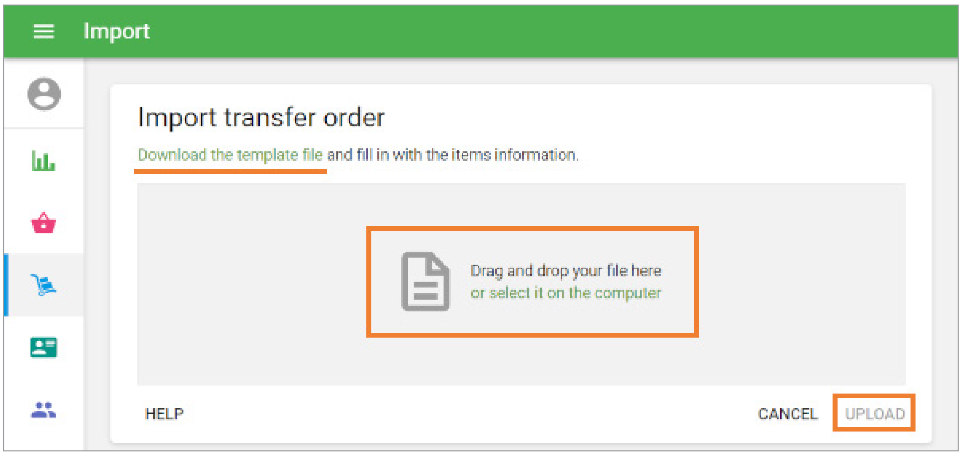
You can also import the items to the transfer order. For this, click on the Import button.

6



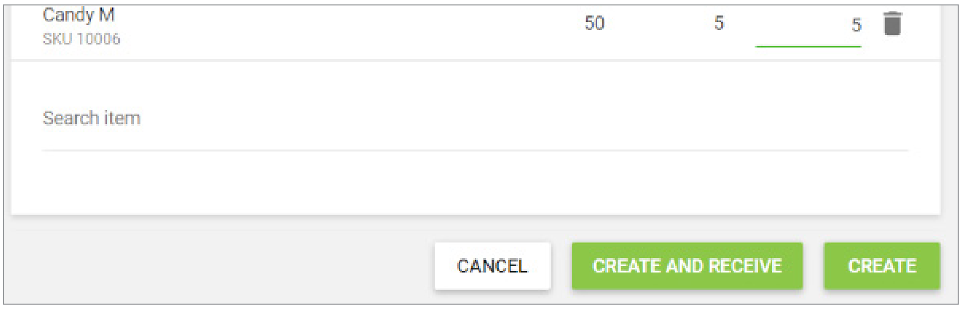
On the Import transfer order page, you can download the template CSV file to your computer. Then, fill it with the item's parameters such as SKU, Item name, Variant name, and Quantity. Parameter SKU or Item name is required. Others are optional. After that, select the CSV file from your computer and click ‘Upload’.

7



After forming the list of items and its parameters, click the ‘Create and receive’ button to make the transfer order and complete the transfer, which will mark the transfer as received and change the stock in source and destination, or click on the ‘Create’ button to make a transfer order, which reduce only the source stock.

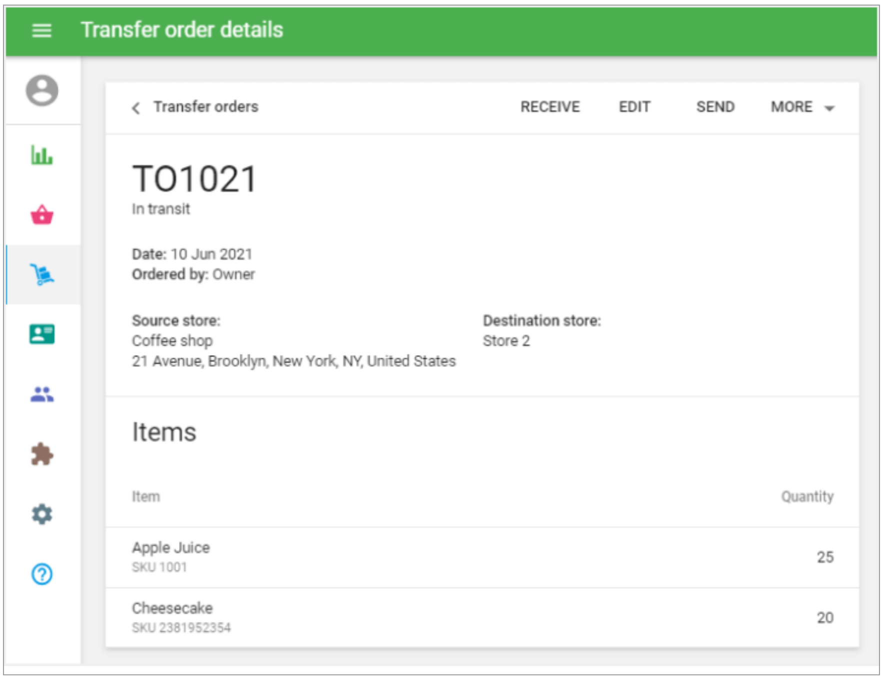
8



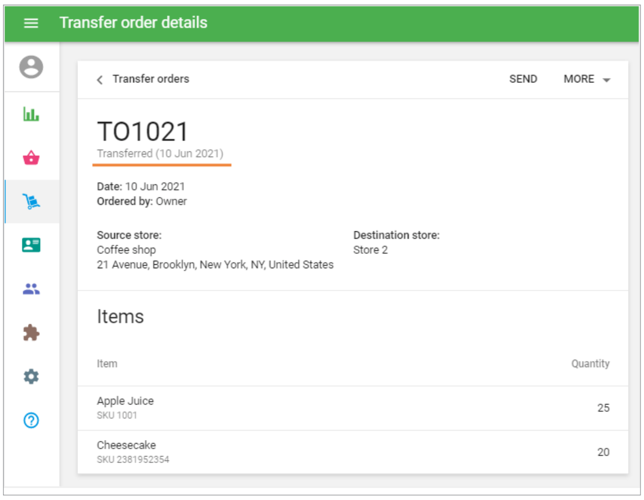
You can send your transfer order by email to the destination store by clicking on the ‘Send’ button at the top. To edit the order, click on the ‘Edit’ button.

There are additional operations available with the transfer order in the ‘More’ menu: Save as PDF or CSV file, Duplicate, Print labels.

9



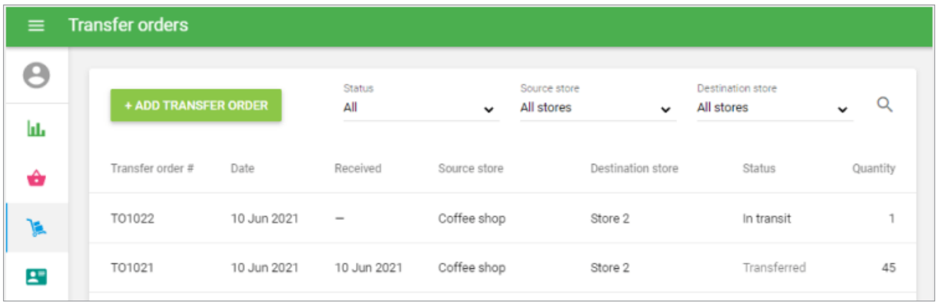
10



Afterwards, the stock of the transferred items in the destination store will be changed according to the transferred amount. You will see the completed transfer order.

Transfer orders can have 2 different status: 'In transit' — created but not completed, and 'Transferred' — items have been received by the destination store.

11



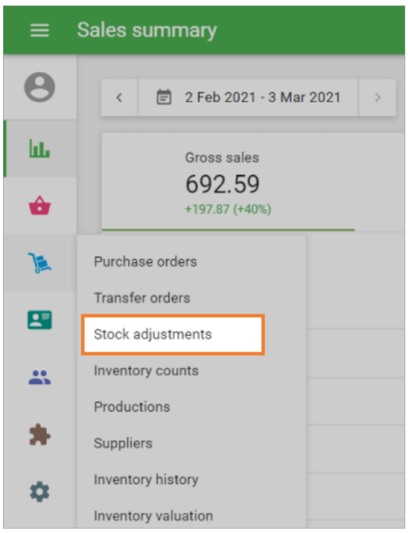
4.6 How to Work with Stock Adjustments

Stock Adjustment functionality allows you to modify the stock of items and indicate the reason for that adjustment.

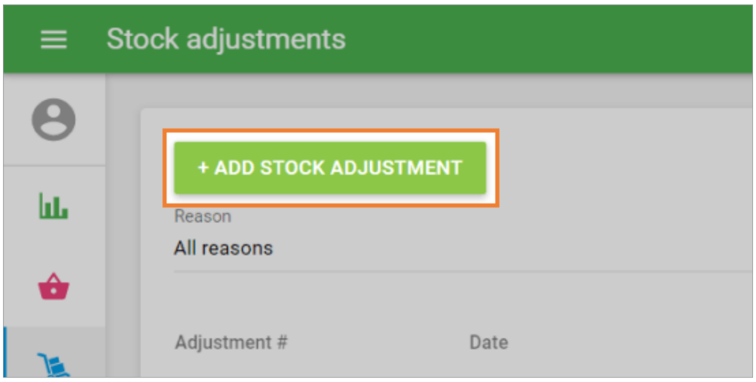
Stock Adjustments is a part of the Advanced inventory management and are available only to those users who have subscribed to this functionality.

Go to 'Stock adjustments' section in the 'Inventory management' menu.

1

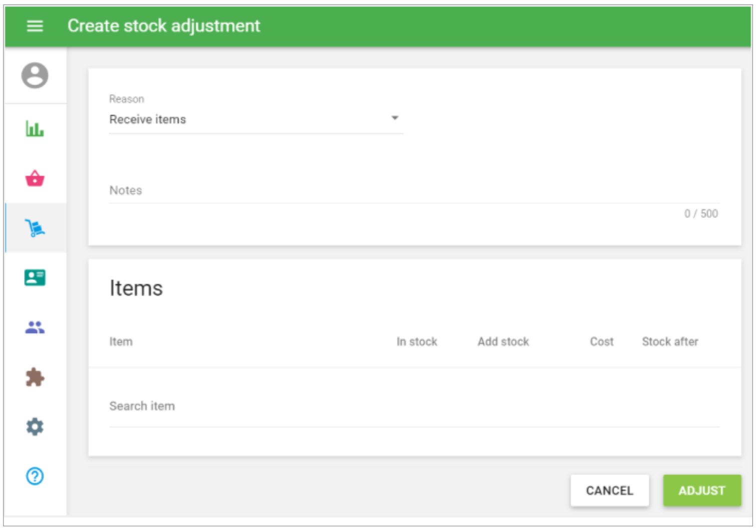


2



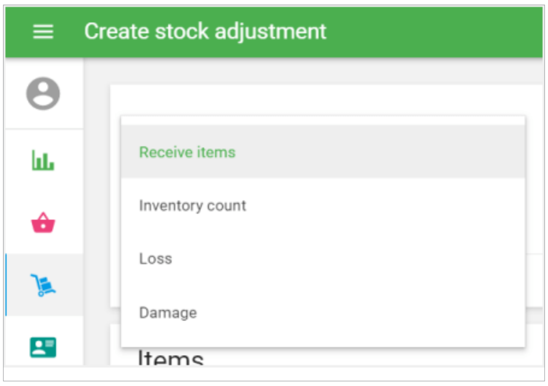
To create an adjustment, click '+ Add stock adjustment' button.

3



The form 'Create stock adjustment' will open for editing.

4

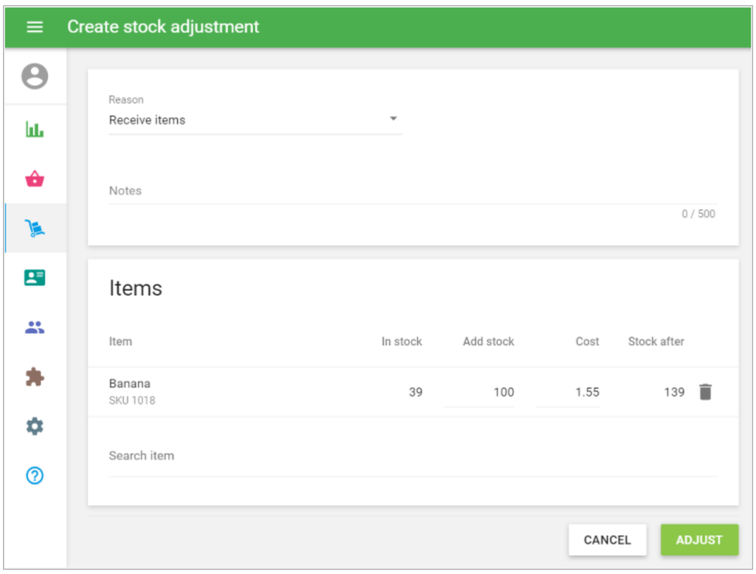


From the drop-down menu, select the reason for the adjustment and choose the store.

You can make notes for your adjustment in the 'Notes' field.

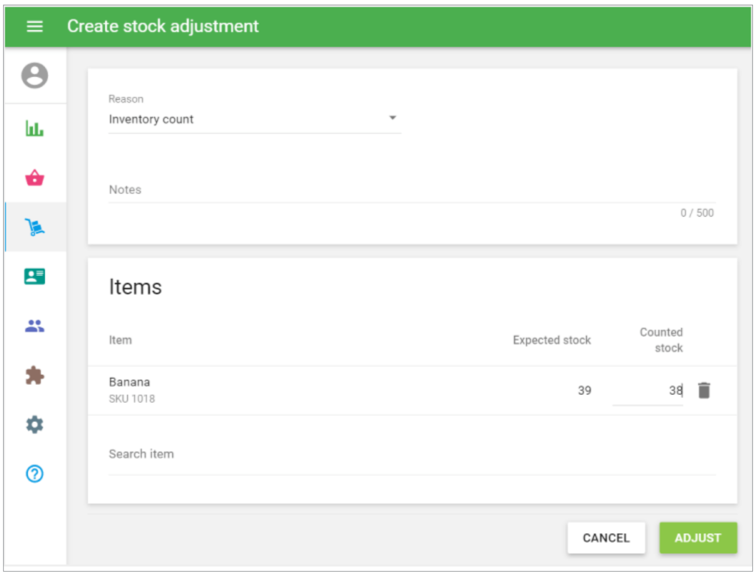
In the Items section, add the items you are adjusting from your items list.

5



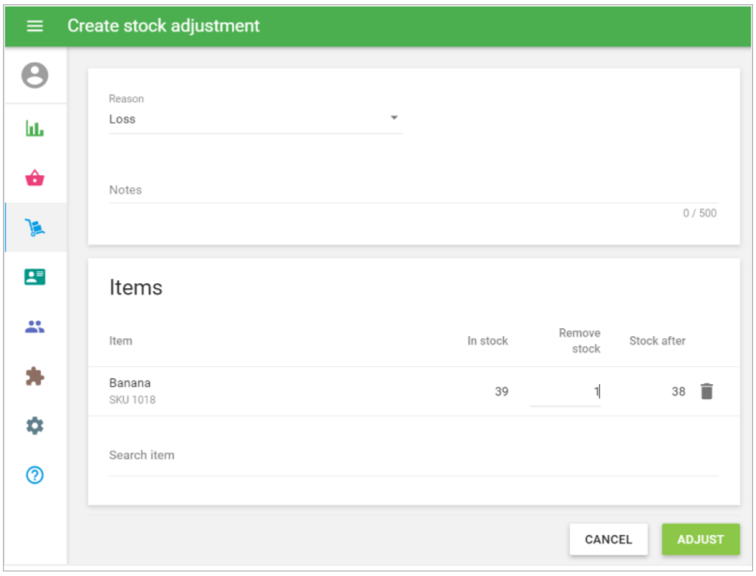
If you have chosen '**Receive Items'** as the adjustment reason, fill in the 'Add stock' and 'Cost' fields for each item.

6



If you have chosen **'Inventory count'** as the adjustment reason, fill in the 'Counted stock' field for each item.

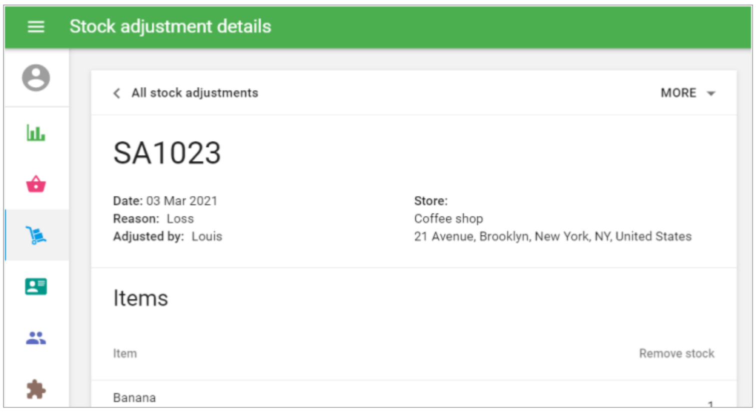
7



If you have chosen **'Loss'** or **'Damaged'** as the adjustment reason, fill in the 'Remove stock' field for each item.

Click the 'Adjust' button to complete adjustment.

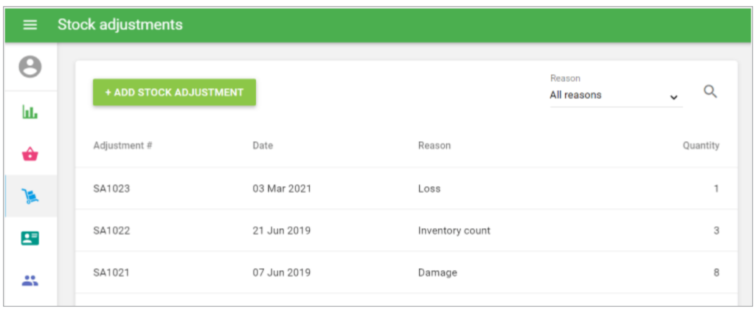
8



Afterwards, the stock of the adjusted items will be changed. You will see the stock adjustment details.

Under 'More' menu you can find 'Save as PDF' and 'Save as CSV' option to do with the document.

9



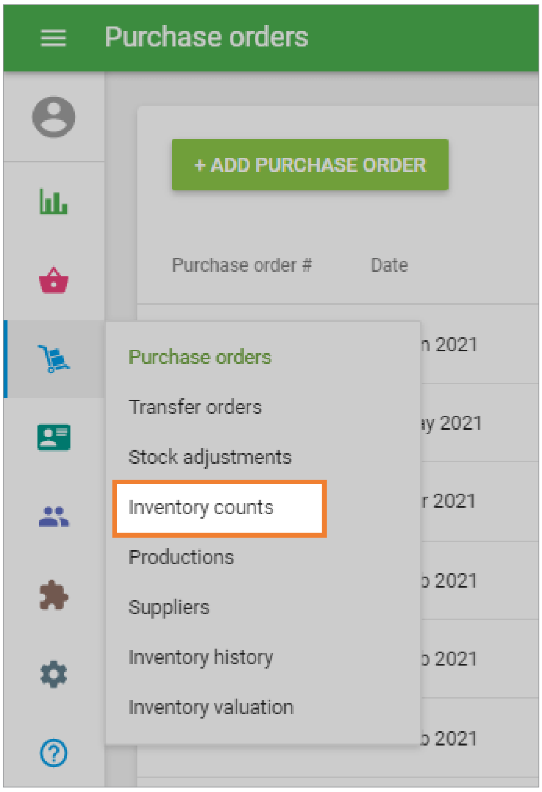
You can see the list of all adjustments as shown below.

4.7 How to Work with Inventory Count

Inventory Count is a part of the Advanced inventory management and is available only to those users who have subscribed to this functionality.

Inventory Count functionality allows to:
- reconcile the expected and actual inventory for all or selected items;
- see the amount of inventory loss or surplus inventory;
- keep documents for each inventory.

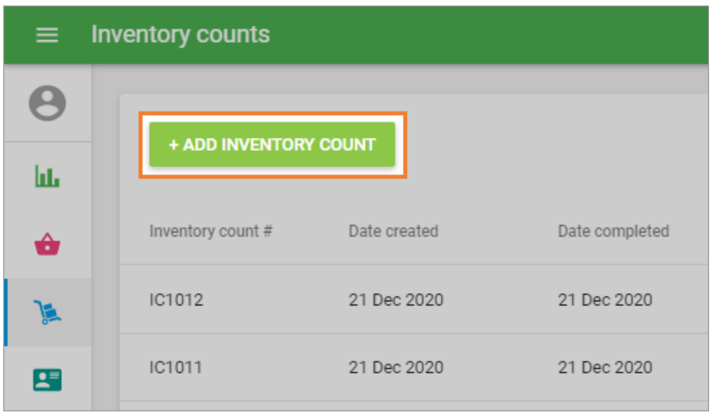
1



Go to the 'Inventory Count' section in the 'Inventory management' menu.

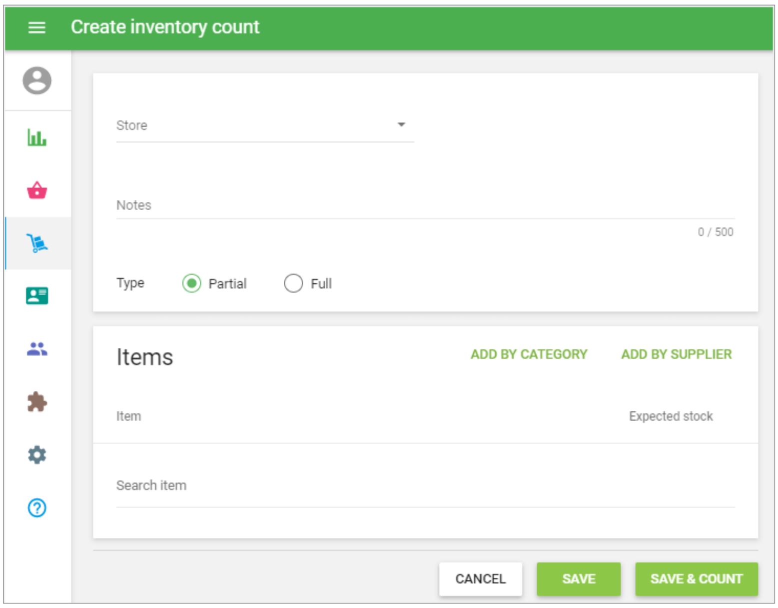
To create an inventory count, click on the '+ Add inventory count' button.

2



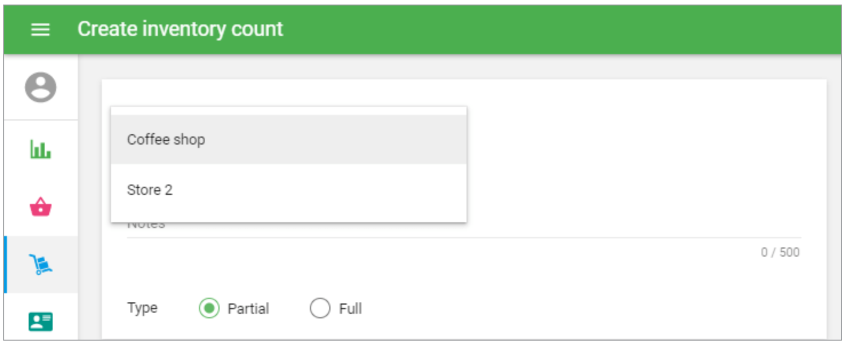
The form ‘Create inventory count’ will open for editing.

3



Select the store from the drop-down list where you would like to perform the inventory count. You can also make notes in the ‘Notes’ field.

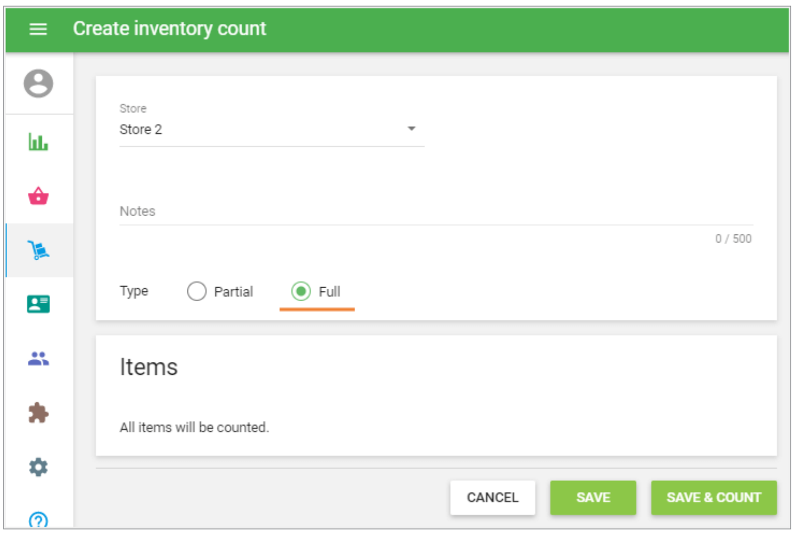
4



Then choose the type of your inventory count: ‘Partial’ or ‘Full’.

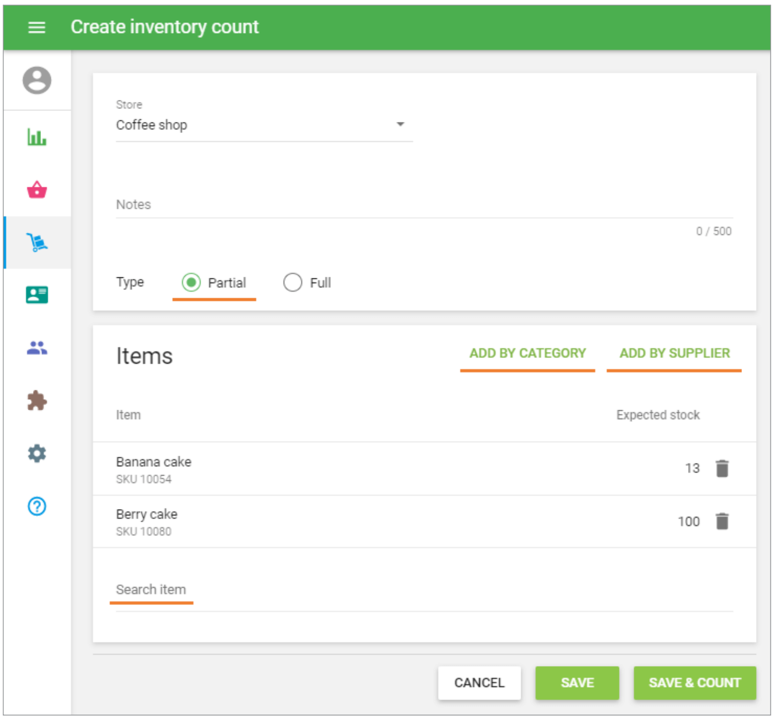
For a **Full** inventory count, you do not need to choose the items for the count, because all items in the system whose ‘track stock’ option is enabled will be automatically added to the document.

5



For a **Partial** inventory count, you have to add the items to the count manually. You can add items to the list one by one in the 'Search Item' field, or you can add a whole category by clicking on the 'Add by category' button, as well as adding all items assigned to a certain supplier by clicking on the 'Add by supplier' button.

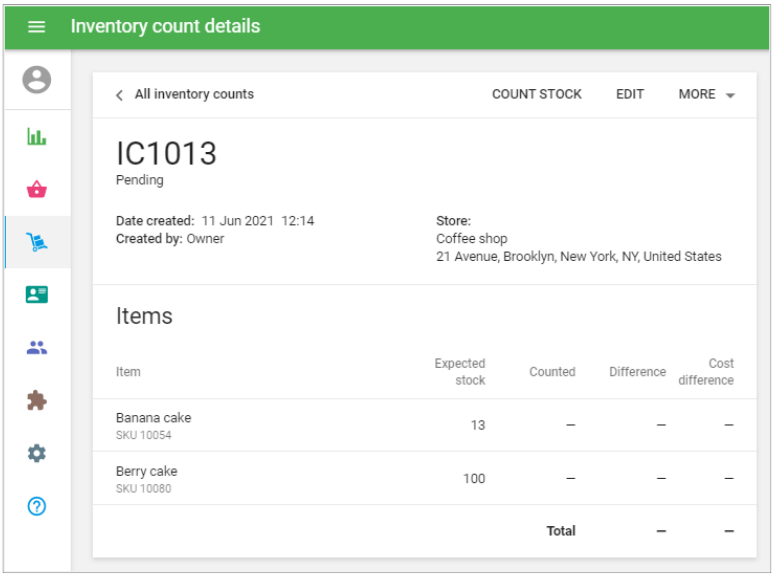
6



Please note that when adding items to the list, you will not see composite items and items whose track stock option has been disabled. If the product contains variants, then all the variants are displayed in separate rows.
You will see the current stock information of the chosen items in the selected store at the 'Expected stock' column.

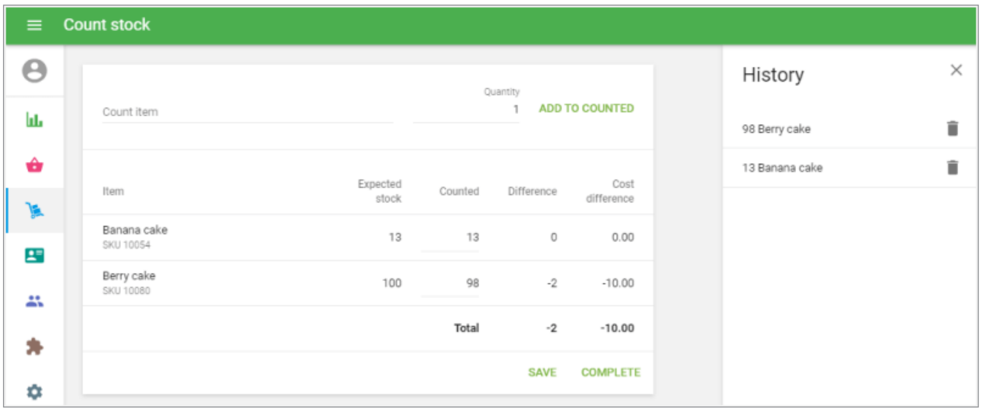
Click on the 'Save' button to make an Inventory count document, or 'Save & count' to make a document and start the inventory count.

7



By clicking on the ‘Count stock’ button, you can start the counting process.

8

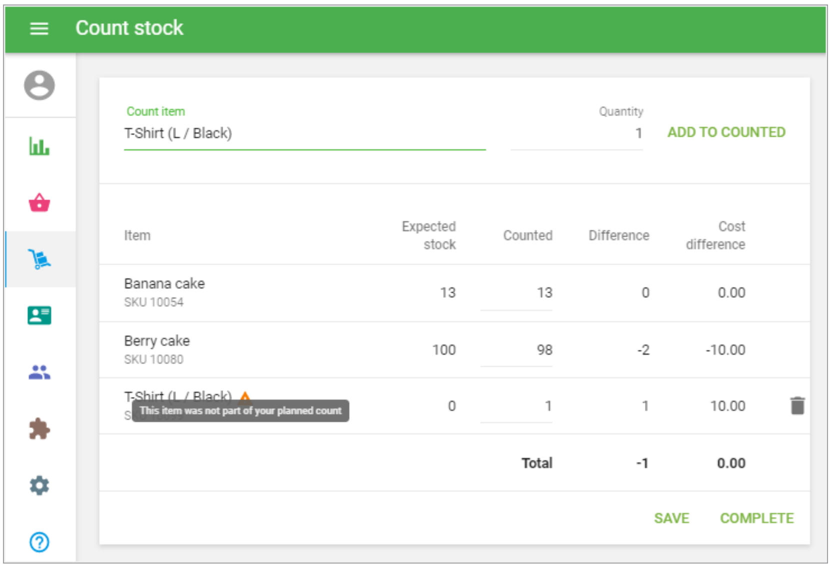


You can enter the counted quantity in two ways:

1. Search and select the item in the ‘Count item’ field, specify its quantity, then click ‘add to counted’. For your convenience, you can also add it with a barcode scanner by scanning the item barcode as many times as its quantity in stock (each action will be displayed in the history). It may be useful when you count the items by blocks: for example, if there are 10 pieces in one block, you can scan the barcode 10 times or enter the number ‘10’ in the ‘Quantity’ field.
2. Fill in the quantity of the items in the ‘Counted’ column.

If you add an item that is not in the inventory list, either by typing it in in the ‘Count item’ field or scanning the item barcode, the system will warn you about this with a yellow icon and the message: “This item was not part of your planned count. You can delete it or proceed”.

9

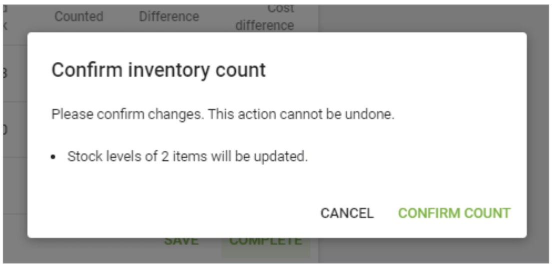


You will see the history of quantity changes on the right side of the screen. Therefore, you can cancel wrong entries at any time.

The system automatically saves your count every 30 seconds to prevent data loss.

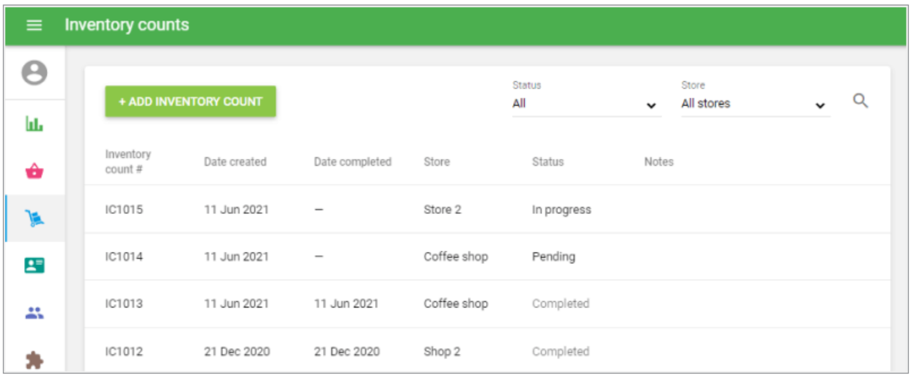
You can save your count to the document with the ‘Save’ button to proceed the count later. ‘Complete’ button will activate the ‘Confirm inventory count’ window. Click on ‘Confirm count’ to finish the count.

10



Afterward, the stock of the counted items will be updated according to the count. Inventory counts can have 3 different status: Pending, in Progress, and Completed.

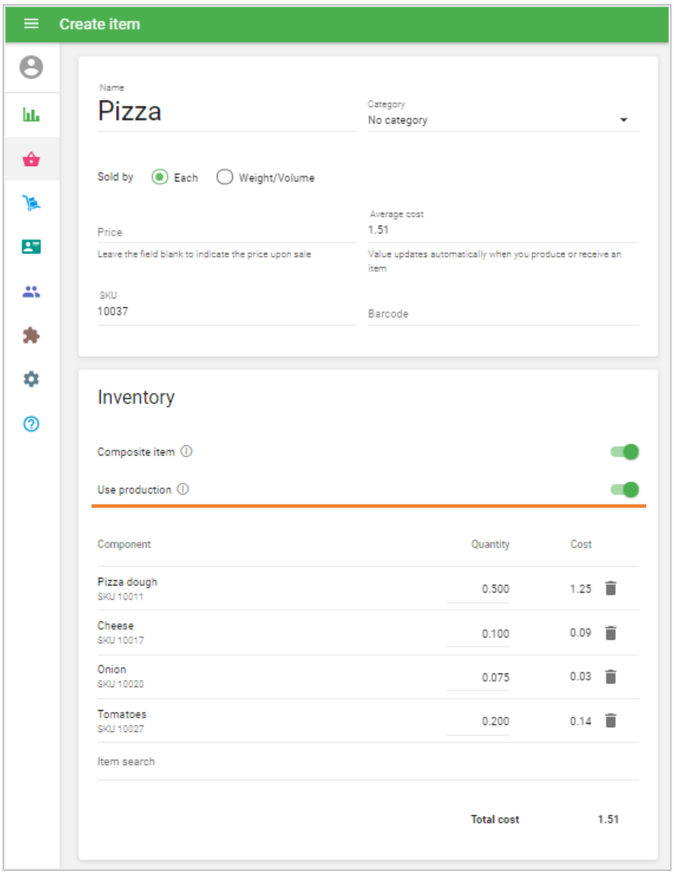
11



4.8 How to Work with Production

Production is a part of the Advanced inventory management and is available only to those users who have subscribed to this functionality.

1

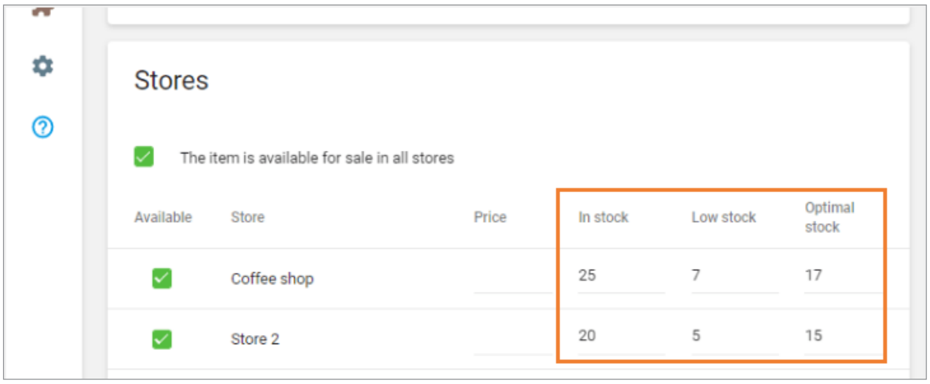


The production functionality allows you to keep a record of the inventory of produced items, not just their components. It can be useful for items that are made in advance, not during ordering. For example, in a bakery. Produced items can be moved between stores, its inventory could be adjusted and counted.

The production option is only available for composite items.
Open the composite item to edit or create a new one. Switch on the 'Use production' option in the Inventory section.

When the option is enabled, the fields ‘In stock’ and ‘Low stock’ will appear in the item form. You can set these values for the composite item manually, and this will not influence the stock of the ingredients.
From now on, the stock of the ingredients will be changed by creating Production or Disassembling (explained later).
When selling an item with the "Production" option on, the stock of the composite item will be reduced, but not its ingredients.

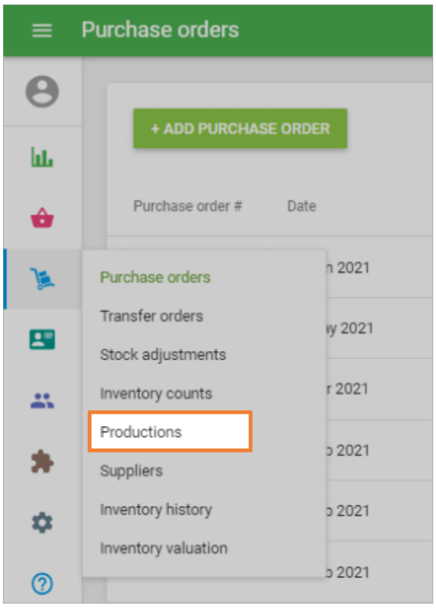
2



Don’t forget to save changes.

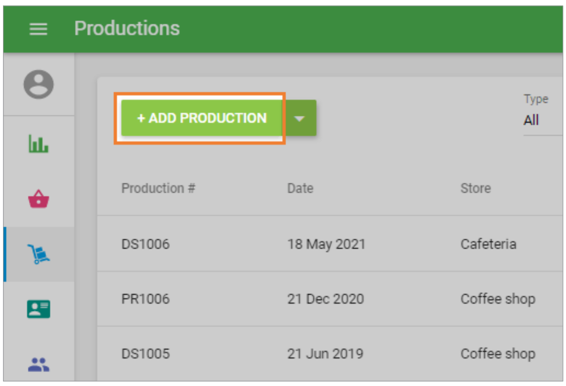
Go to the ‘Production’ section in the ‘Inventory management’ menu.

3



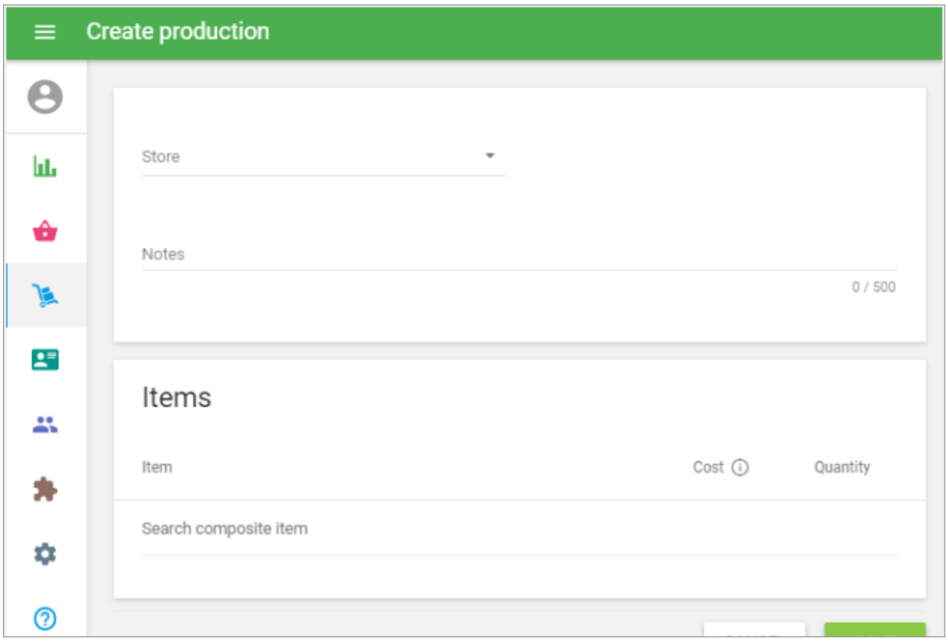
To create a production, click on the ‘+ Add production’ button.

4



The form ‘Create production’ will open for editing.

5

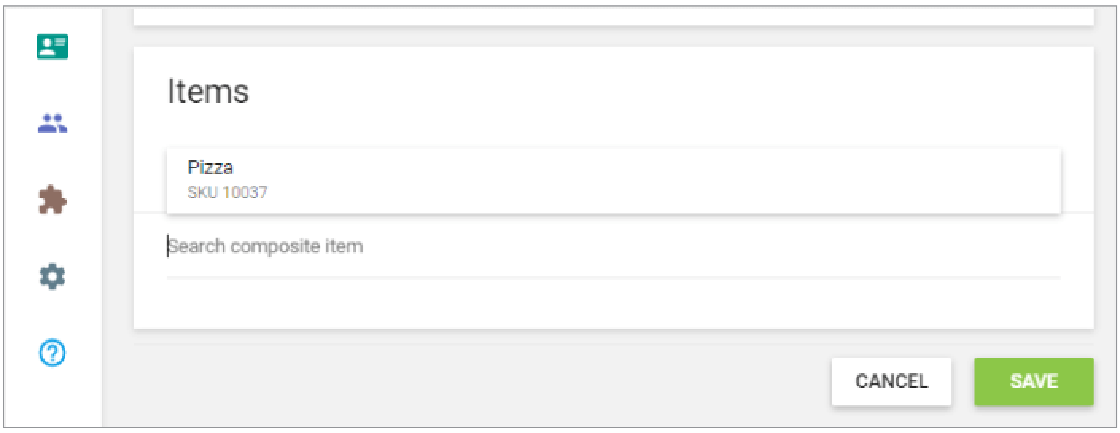


Select the store from the drop-down list where you would like to perform the production. You can also make notes in the ‘Notes’ field.

6

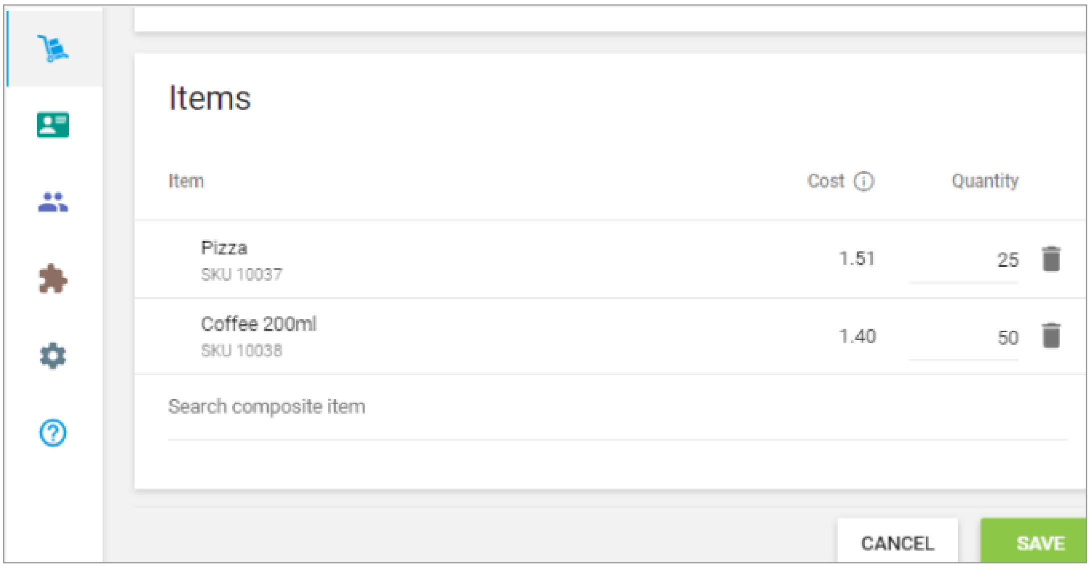
In the ‘Items’ section, you can find and add items from the list of your composite items in which the production option has been switched on. If you click on the field, a drop-down list of your items will appear, and you can type in the item’s name, SKU, or barcode to find the desired item.

7



The 'Cost' field reflects the value that is calculated based on the cost of the components of the item.
Fill in the 'Quantity' field with the quantity of each product that you want to produce.
You can add more items to the order in the same way as above.

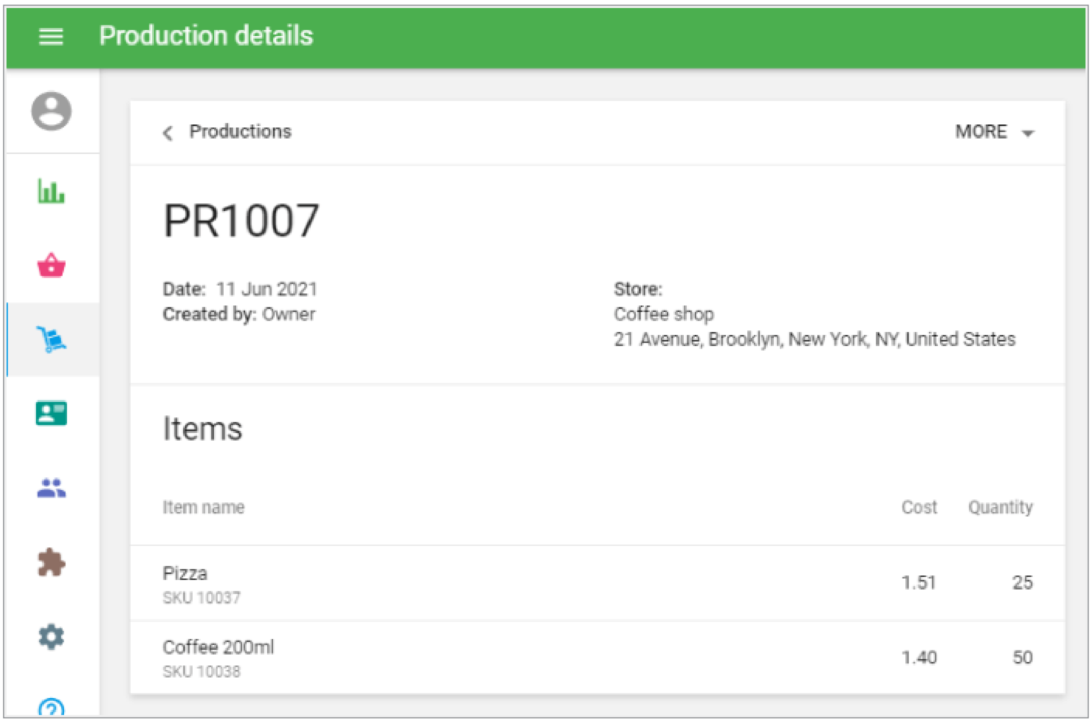
8



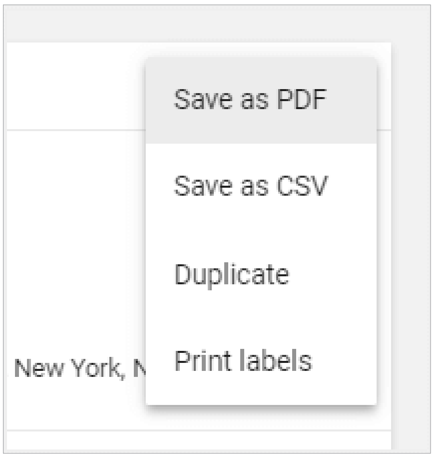
Click on the 'Save' button to create a production.
Afterward, the stock of the produced composite items will be increased according to their quantity; the stock of the components of the produced items will be decreased based on their use in the produced composite items.
Also, the value of the average cost for each produced composite item will be updated.

Now you will see the created production document.

9



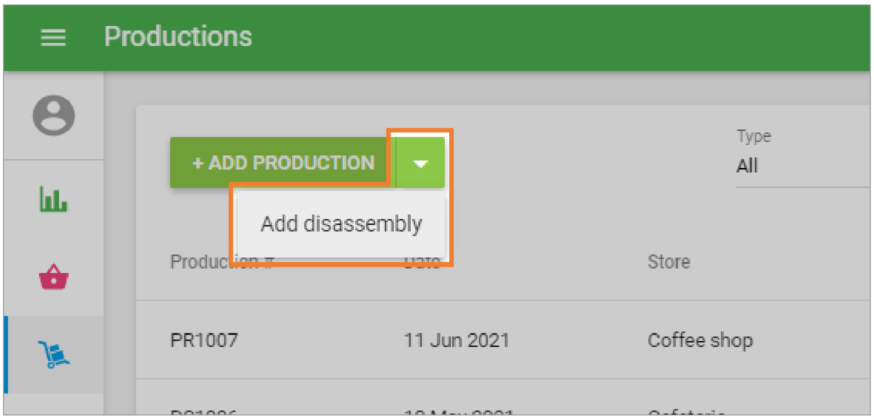
10



There are operations available with the production document in the 'More' menu: Save as PDF, Save as CSV, and Duplicate.

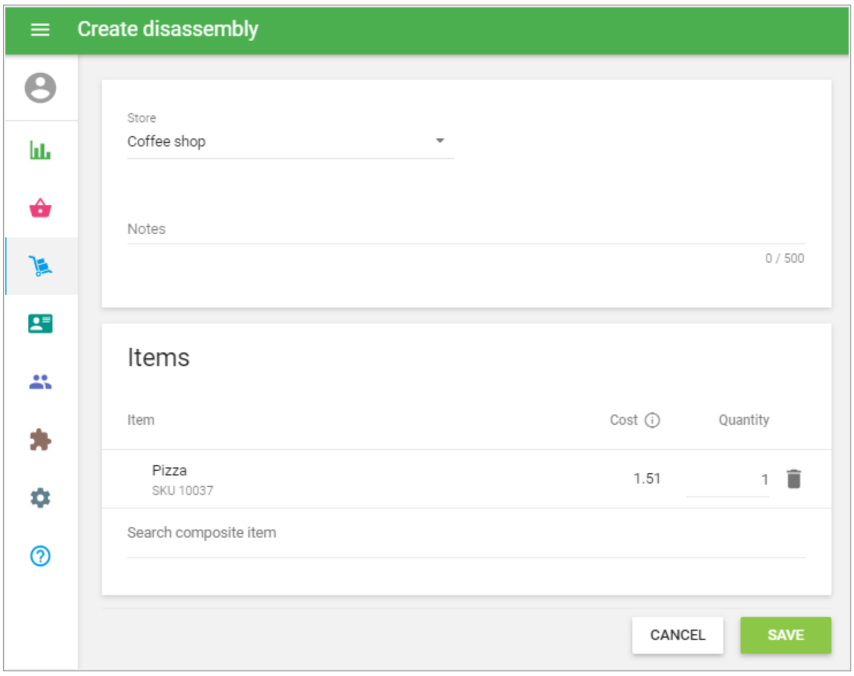
If you want to disassemble the produced composite item, click on the down arrow and select 'Add disassembly'.

11



Fill in the 'Create disassembly' form in a similar way as 'Create production'.

12



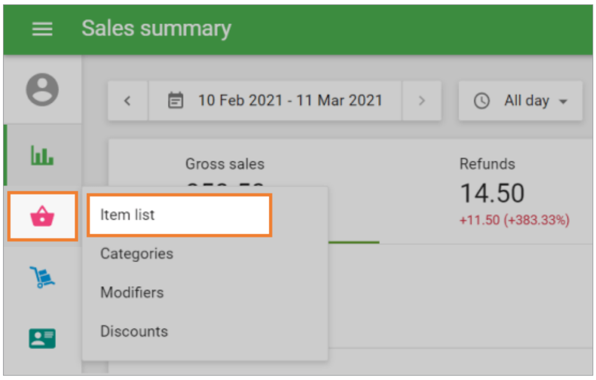
After clicking on the 'Save' button, the stock of the disassembled composite items will be decreased by the mentioned quantity and the stock of their components will be increased based on their use in the produced composite items. The cost of the components is also renewed.

4.9 How to Print Labels for Items

Printing Labels is a part of the Advanced inventory management and is available only to those users who have subscribed to this functionality.
Labels are used to mark the items in the store. The label can contain the item's name, SKU, price, and barcode. Labels with a barcode allow you to use the scanner to add items to the ticket.

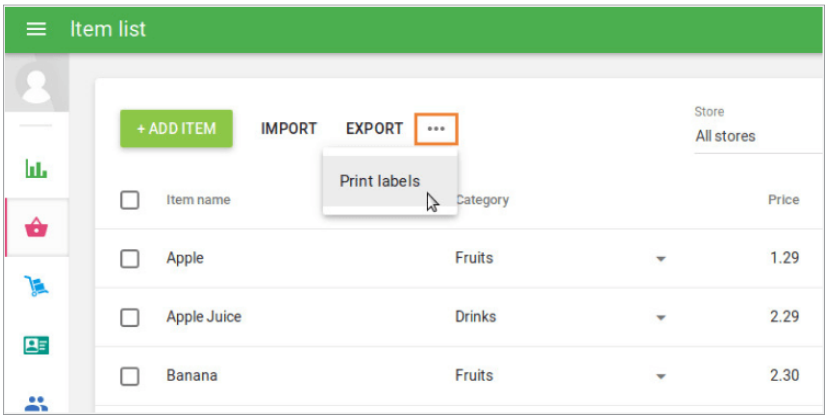
Go to the 'Item list' menu in the Back Office.

1



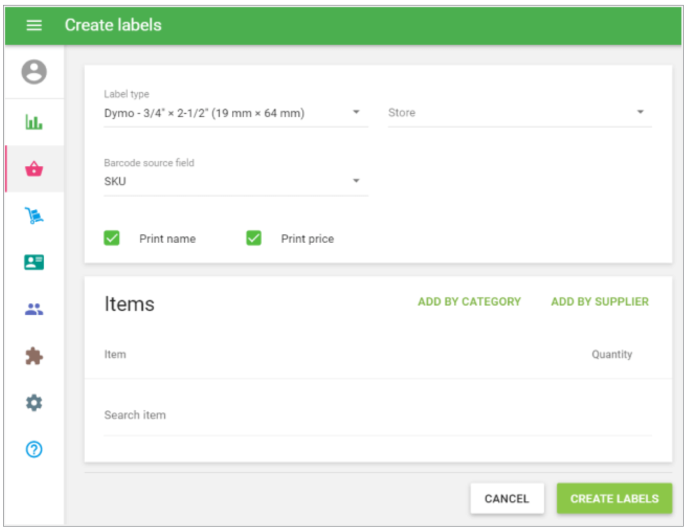
Click on the 'Print labels' button at the three dots menu.

2



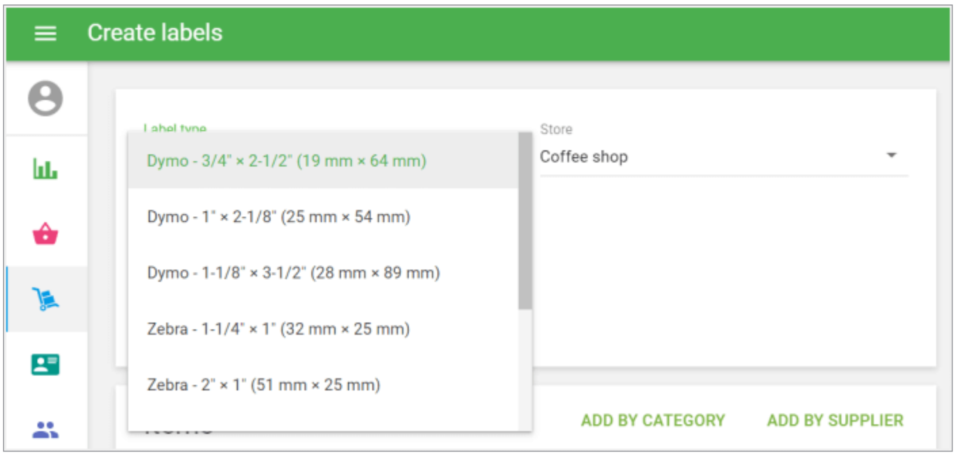
The form 'Create labels' will open for editing.

3



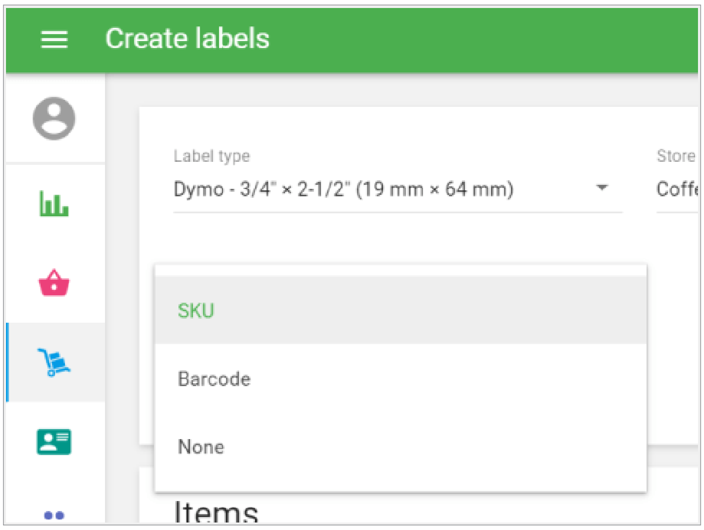
Select a ‘Label type’ from the drop-down list of predefined printing templates.

4



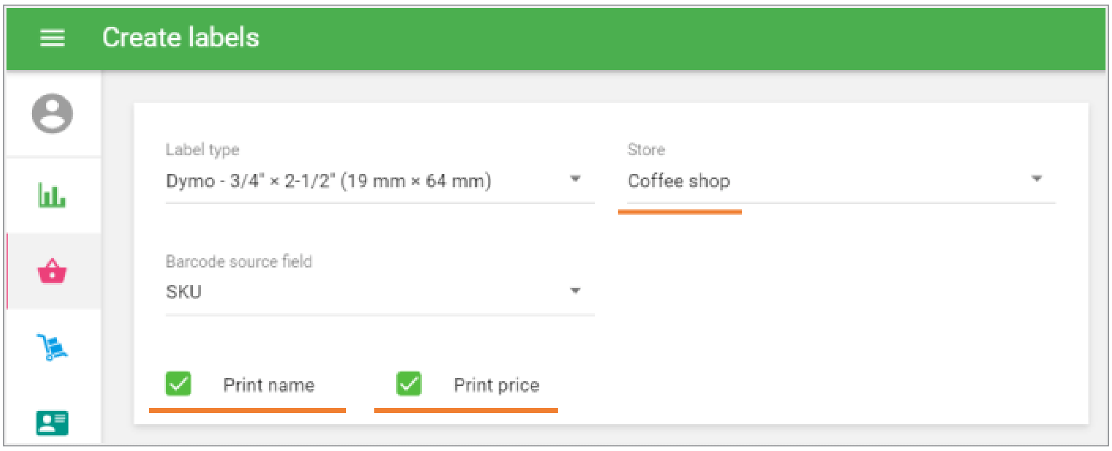
Select a ‘Barcode source field’ from the drop-down list of fields: SKU, Barcode, or None. In case of choosing ‘None’, the labels will not have a barcode.

5



Choose the ‘Store’ from the drop-down list of your stores, for which you are going to print labels. Select ‘Print name’ and ‘Print price’ boxes if you want them printed on your labels. The label will contain the price of the items from the selected store.

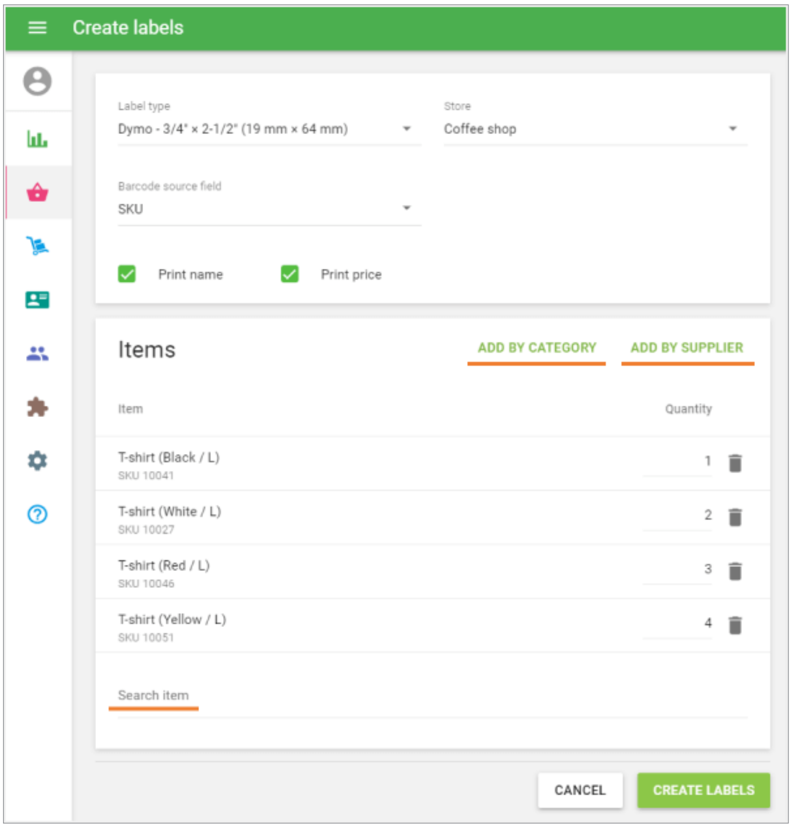
6



The system will remember your choice and suggest these parameters as default the next time.

In the ‘Items’ section, create a list of your items for which you are going to print labels. You can add items to the list one by one in the ‘Search Item’ field, or you can add a whole category by clicking on the ‘Add by category’ button, as well as adding all items assigned to a certain supplier by clicking on the ‘Add by supplier’ button.
Fill in the ‘Quantity’ column with the number of labels you want to print. Then click ‘Create labels’.

7

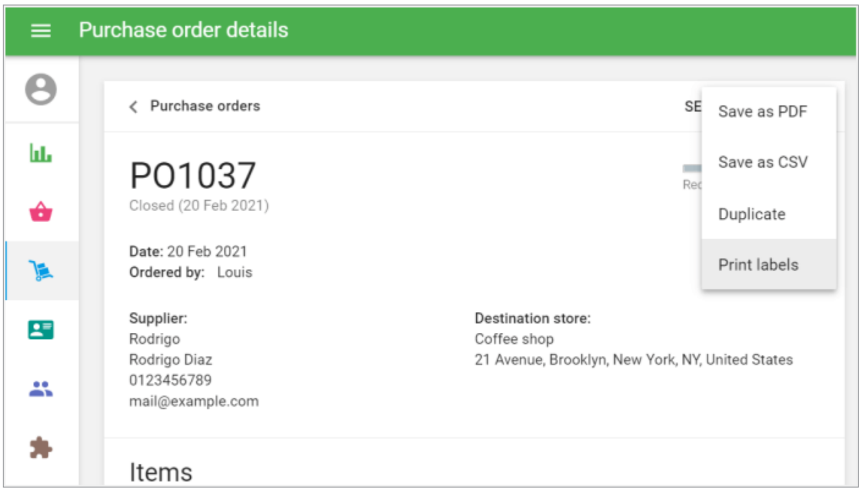


The generated HTML page with labels will open in a new tab of the browser. You can print the labels on your printer by clicking on the ‘Print’ button.

8

In the same way, you can print labels from the Purchase order, Transfer order, or Stock adjustment documents.
Open your document and click ‘Print labels’ in the ‘More’ menu.

9



The ‘Create labels’ window will open with the items from the document.
The system will automatically fill in the quantity of labels based on the quantity of items in your document. But you can correct the quantity of labels for each item or remove items which do not need labels.

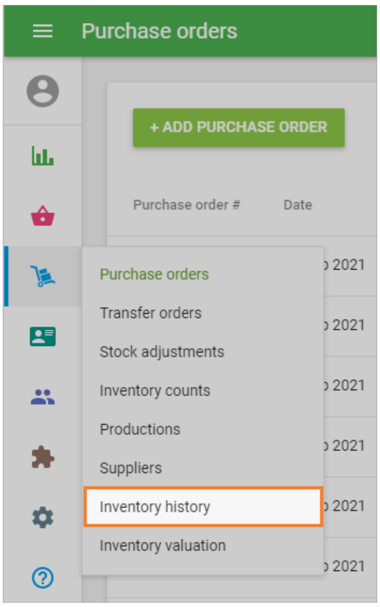
Note

The maximum length of a barcode is 80 characters, but for better visualization on small labels, the optimal number of characters is no more than 18 characters.
Barcode format on the generated labels is Code-128, which supports digits 0-9 and Latin letters A-Z and a-z.

4.10 What is Inventory History

Inventory history is a part of the [Advanced Inventory management]() and is only available to those users who have subscribed to this functionality.

1

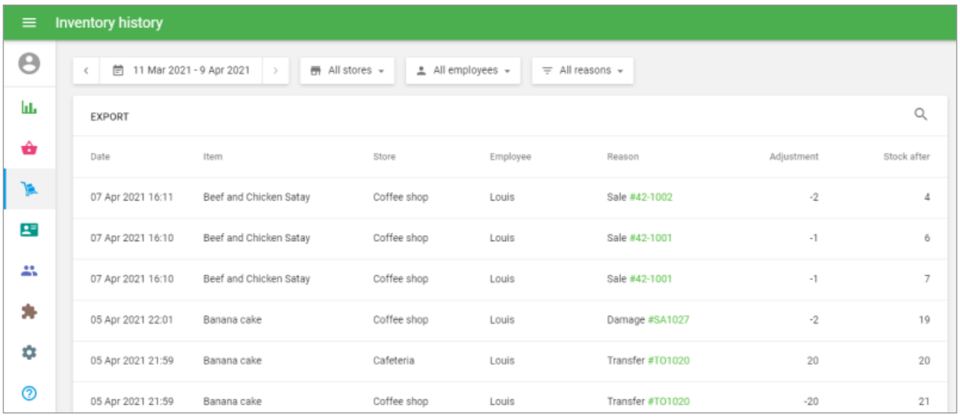


Inventory history allows users to view records of all the changes made in the inventory, including transfers, purchase orders, and adjustments.

Go to ‘Inventory history’ section in the ‘Inventory management’ menu.

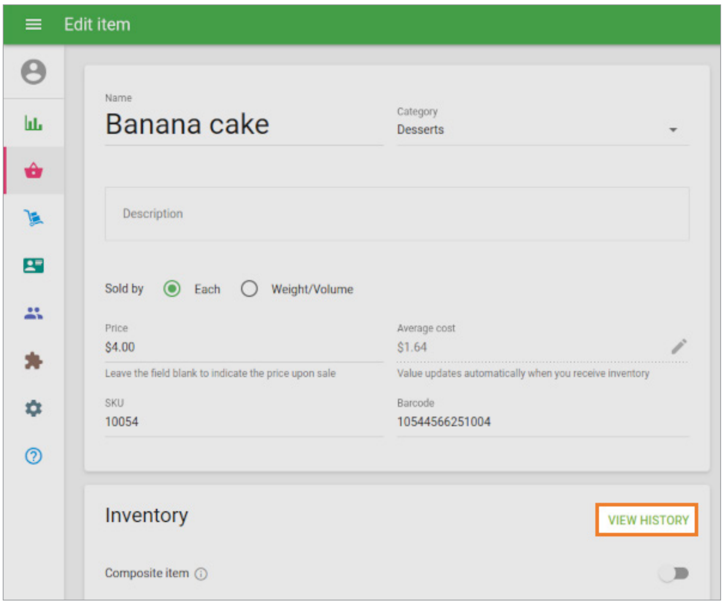
You can see the 'Inventory history' of all the items that underwent any changes. You can filter the history by period, stores, employees or by reason of stock changes, including sales and refunds.

2



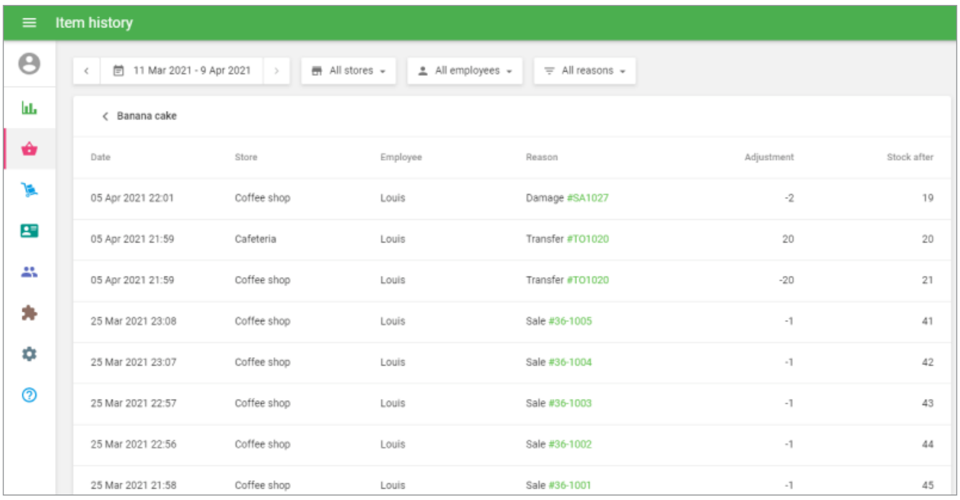
There is a link to the document for adjustments made on the item in the 'Reason' column. The Advanced inventory also gives you the possibility to see the stock history of items. Click on the 'View history' button in the items form.

3



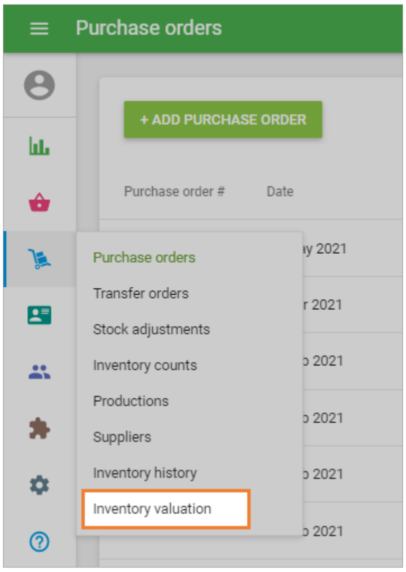
You will see all changes in the stock of selected item.

4



4.11 What is Inventory Valuation Report

1

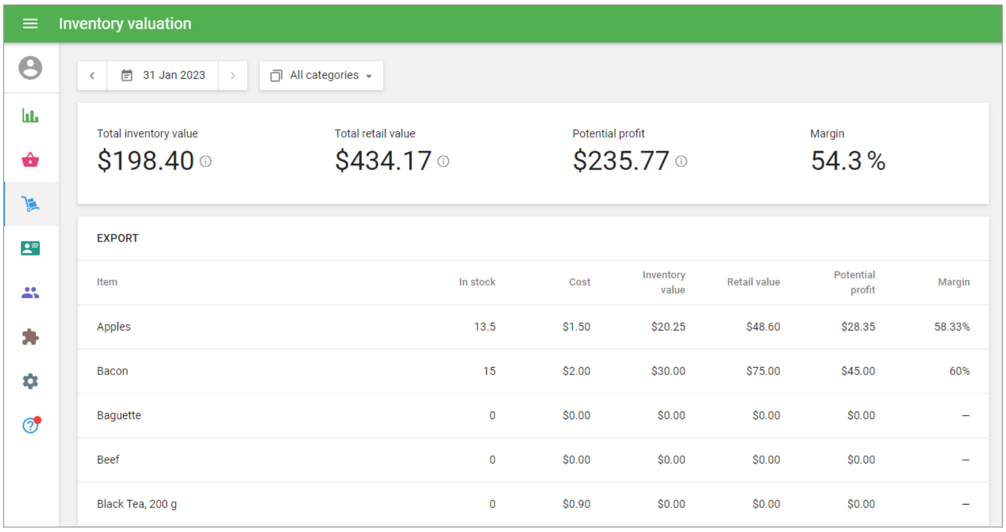


Inventory Valuation Report is a part of the [advanced inventory management]() and is only available to those users who have subscribed to this functionality. Inventory Valuation Report gives an understanding of the total cost of the inventory and potential profits from their sale.

Go to 'Inventory valuation' section in the 'Inventory management' menu.

You can see the up-to-date 'Inventory valuation' report. You can filter the report by categories or stores (if you have multiple stores) and export the data by clicking on the 'Export' button.

2



There is a summary of the inventory information at the top.
Total inventory value is calculated as the sum of the cost multiplied by the stock of all items.
Total retail value is calculated as the sum of the price multiplied by the stock of all items.
Potential profit is calculated as the difference between the total retail value and total inventory value.
Margin is calculated as Potential profit divided by the Total retail value in percentage.

Note

Items with a negative stock are not calculated in the Total inventory value.
Items with a negative stock or a variable price (blank price field) are not calculated in Total retail value and Potential Profit.

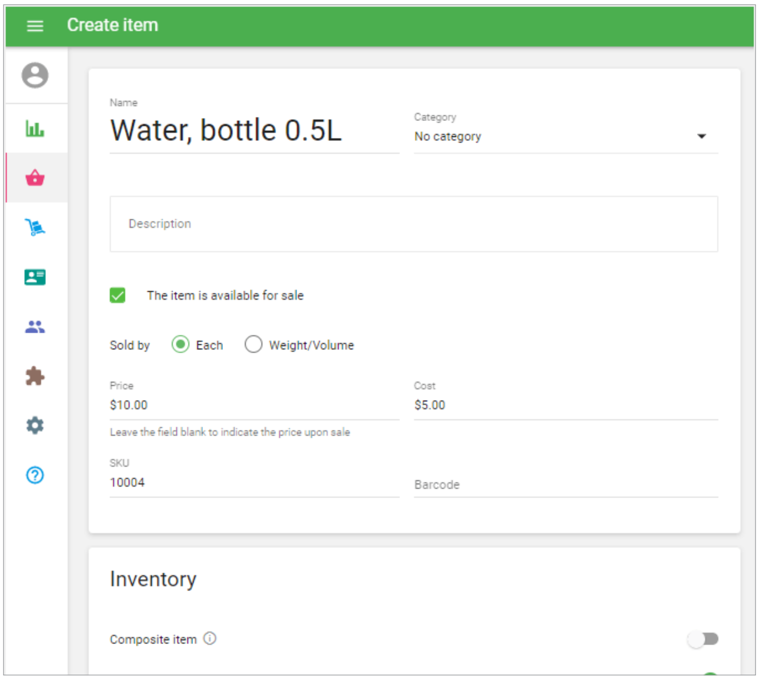
You can also see the detailed inventory information of each item.

4.12 How to Order Items by Boxes, and then Sell them by the Piece

Sometimes, it is required to order items from suppliers only by boxes, when each box consists of a certain amount of items.
It is possible to create purchase orders with items by boxes, and after receiving it, you can disassemble them into items, so you can sell those items by the piece and track their stock.

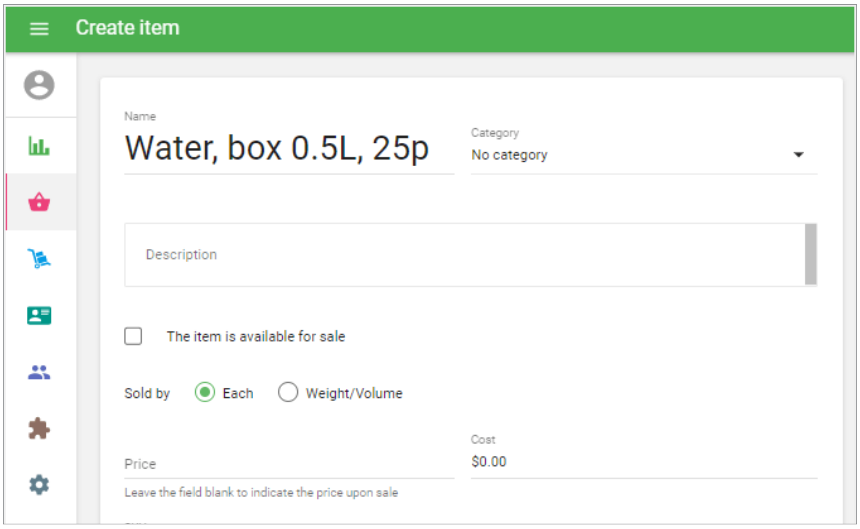
Go to the Items list at the Back office. You need to create two sets of items: for selling and to order by boxes.
First, you need to have an item for sale by the piece. Let's say you create an item, sold by each, 'Water, bottle 0.5L'. Don't forget to enter the initial cost and set the tracking stock for the item.

1



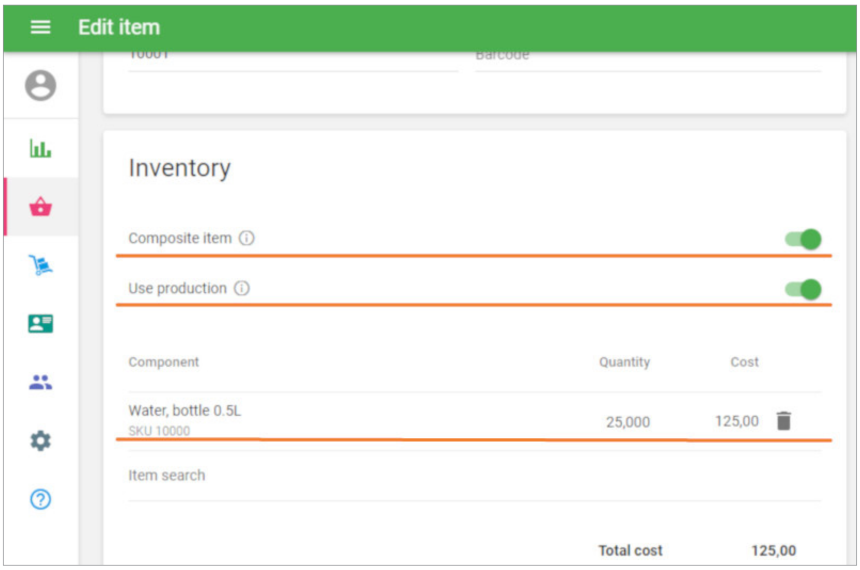
Then, create a composite item for box orders. If you are not going to sell by boxes, you can make it invisible for sale. Let's create an item, 'Water, box 0.5L, 25p'.

2



At the inventory block, set this item as composite and switch on the option ‘Use production’. Choose the component ‘Water, bottle 0.5L’, and set the quantity for one box. Let’s say each box contains 25 bottles of water.

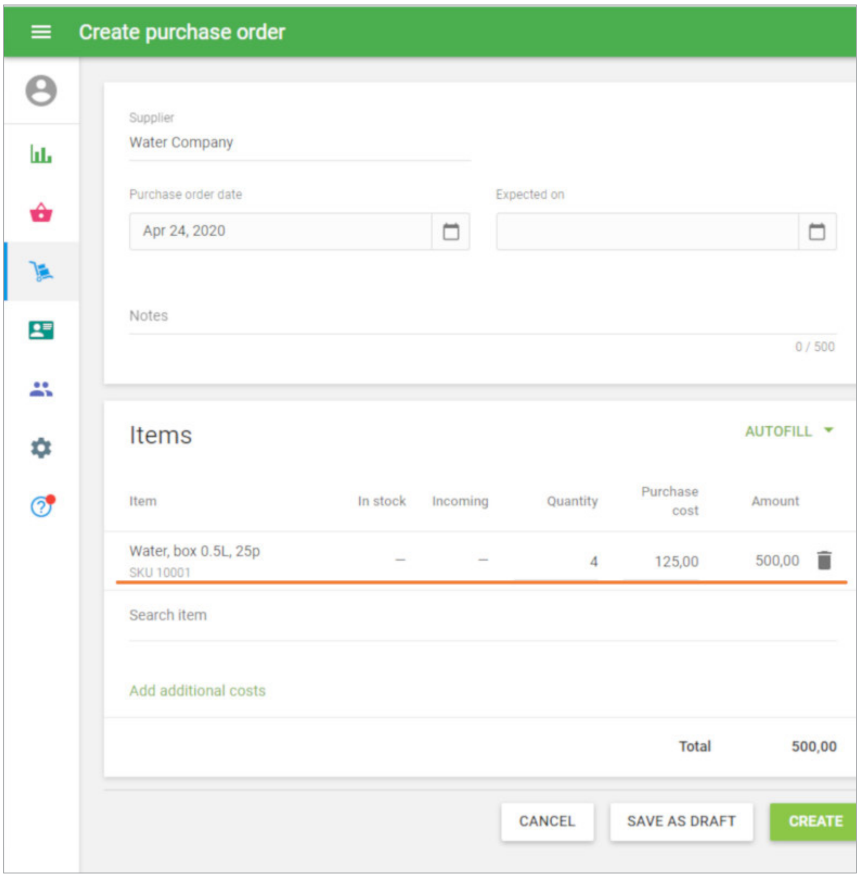
3



Don’t forget to save changes.

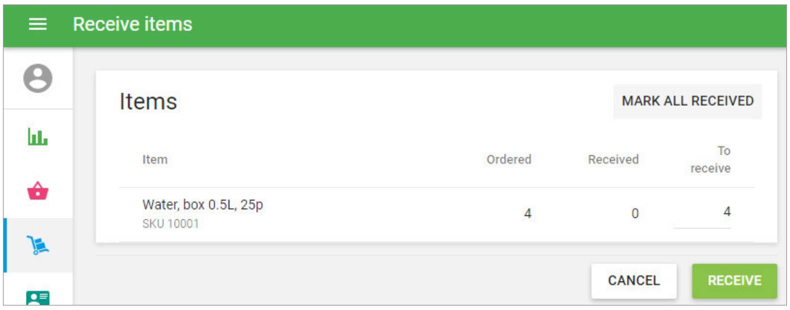
Now you can order this item by the box.
Create a purchase order, select the boxed item.
Fill in the ‘Quantity’ and the ‘Purchase cost’ for the box. And create a purchase order.

4



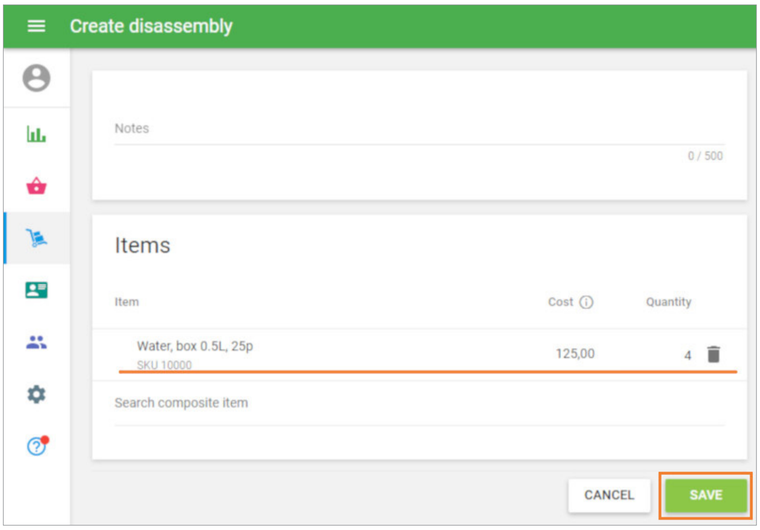
After receiving, the received stock will renew the stock of the boxed item.

5



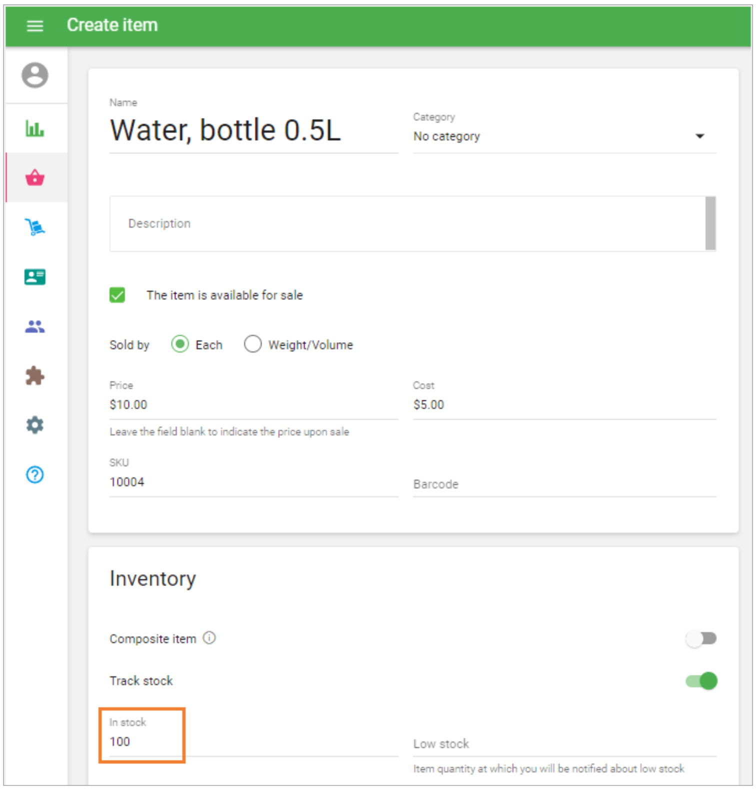
After that, you can disassemble the boxed items into pieces.
Create disassembly, select the boxed item, and put the number of received boxes.

6



After that, the stock of 'Water, bottle 0.5L' will be automatically updated.

7

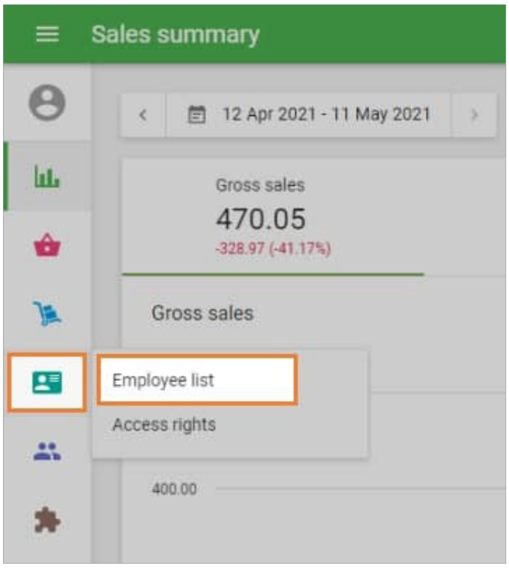


5. Employees

5.1 How to Add an Employee in Loyverse

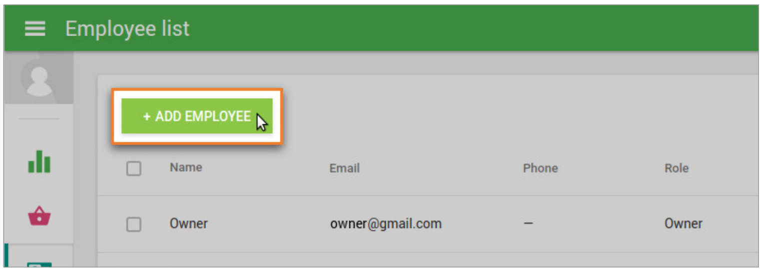
After logging in to Back Office, go to the ‘Employee list’ in the ‘Employees’ section.

1



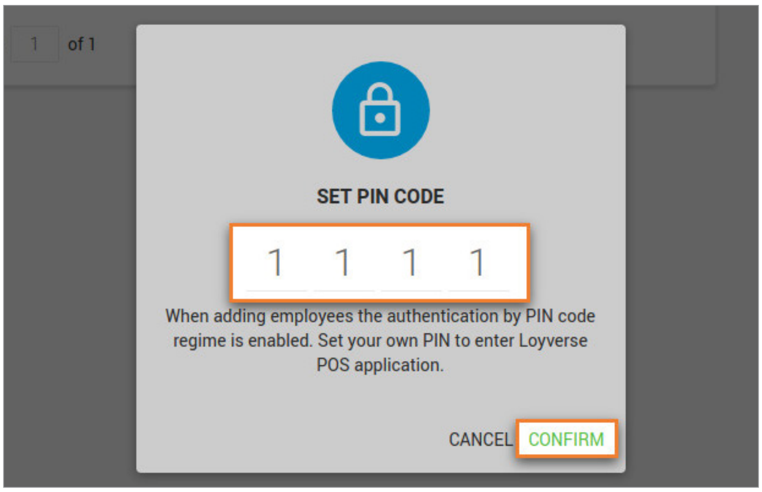
Click on the ‘ADD EMPLOYEE’ button.

2

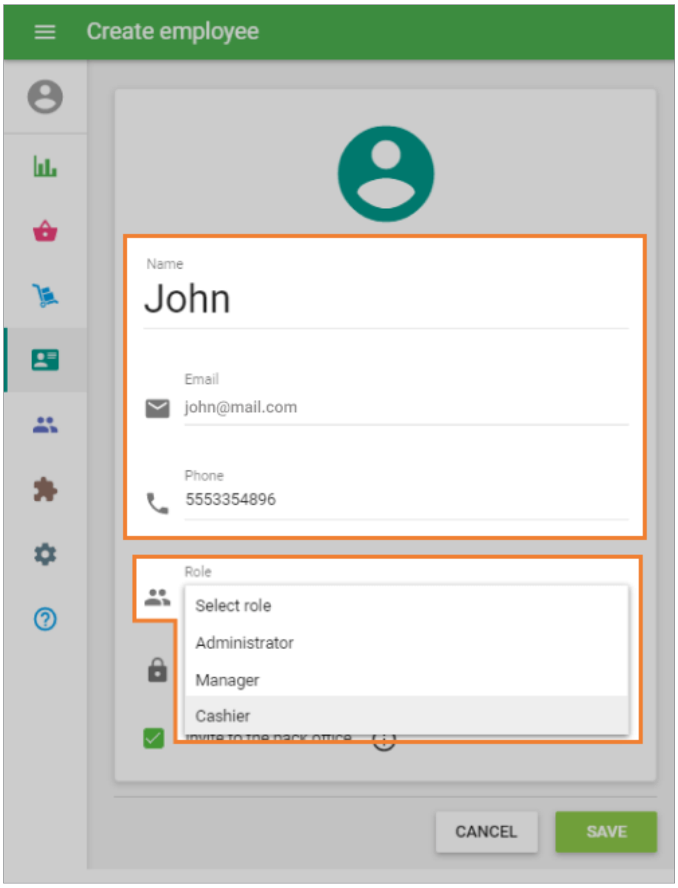


When you add a new employee for the first time, as a shop owner, you will be asked to set your PIN code. After your PIN code as an owner is set, you will not be asked for this again.

3



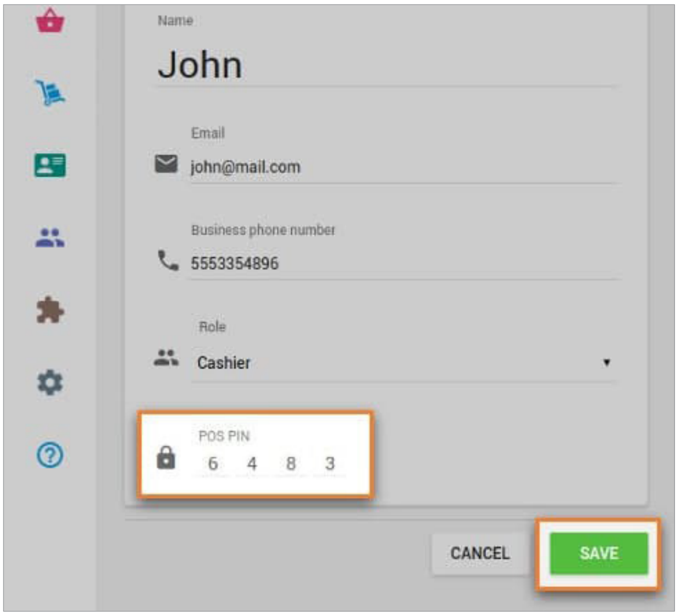
4



Then you can add an employee into the system.

You can put the employee's name, email address, phone number and their role: cashier, manager or administrator.

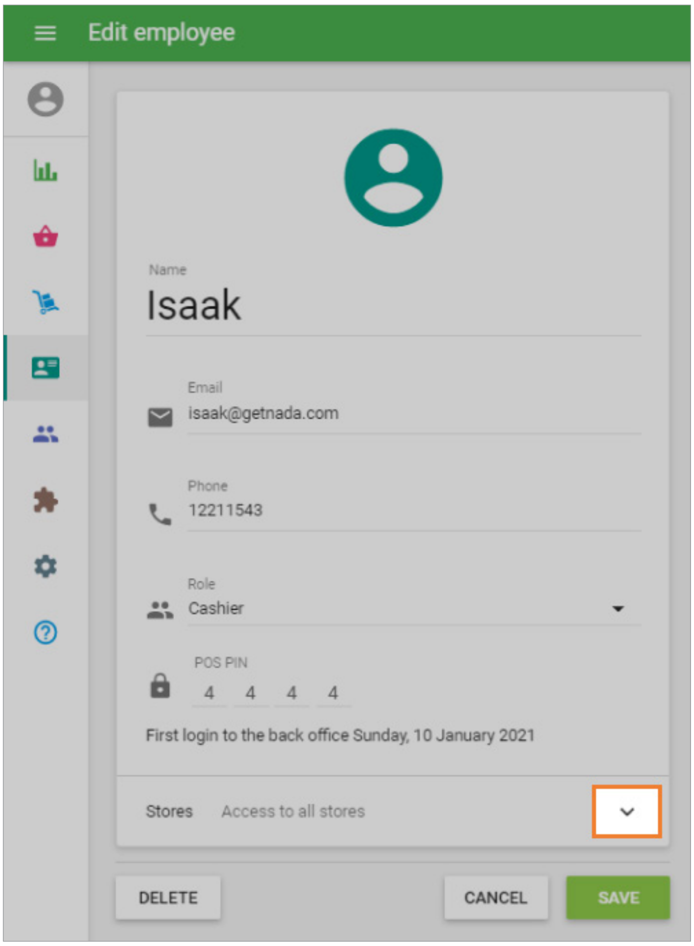
5



After creating your four digit PIN number, click 'SAVE'.

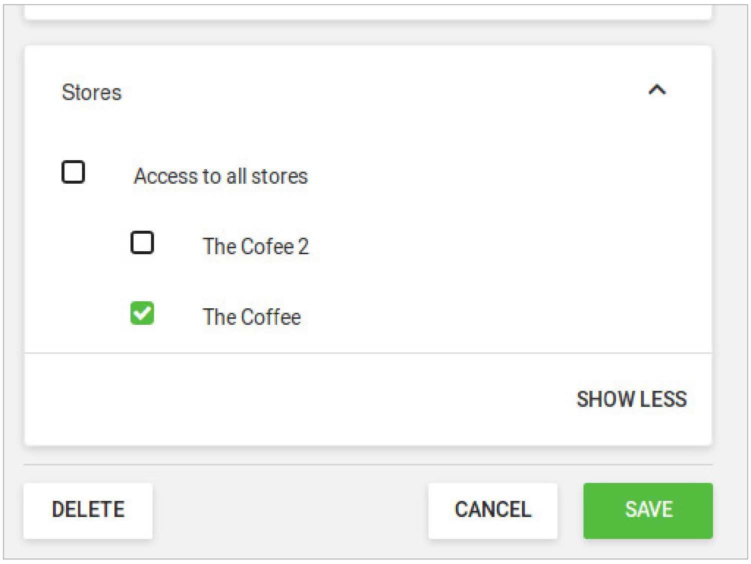
If you have **multiple stores** you can manage your employee access to them. For this, at the bottom of the form find the 'Stores' line and click on the down arrow.

6



Afterwards, an additional window will slide down with the list of your stores. You can assign your employee to a particular store.

7



Don't forget to save changes.

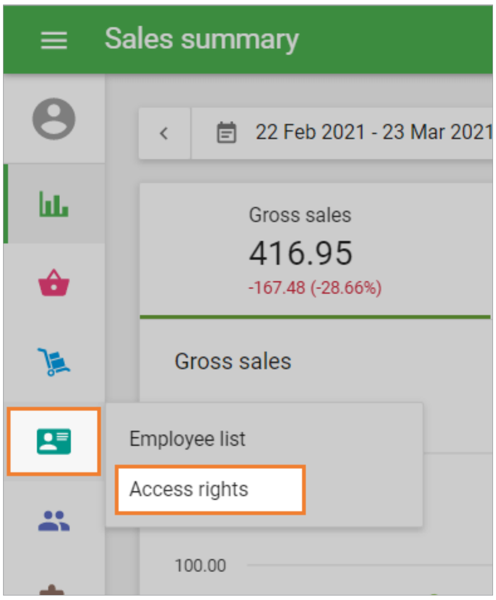
Nice! You have now added an employee to Loyverse POS and they will be able to sign in for work on their mobile device.

5.2 How to Manage Access Rights of Employees

The owner can give employees different access rights to the POS app and the Back Office. To do this, you can set up the users' roles by assigning them to a certain group.

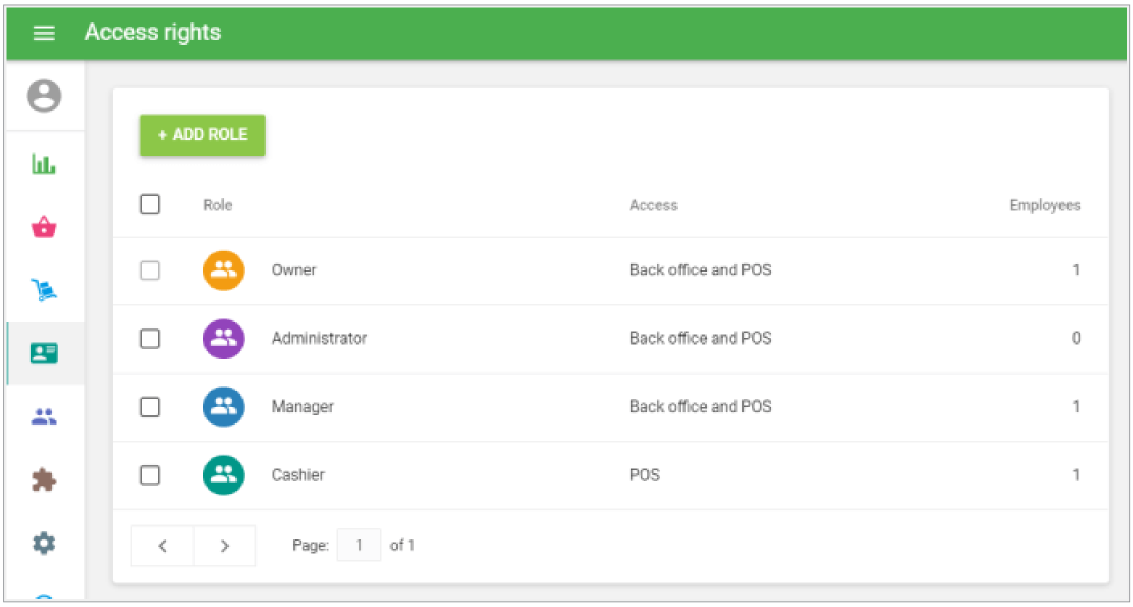
Enter the Back Office and open the 'Access rights' section in the Employee menu.

1



You can see the user groups with their roles. By default, there are four user groups with pre-set roles: Owner, Administrator, Manager, and Cashier. You can create a new group by clicking on the '+ Add role' button.

2



The owner has all the possible rights, which cannot be changed. All other groups can be edited.

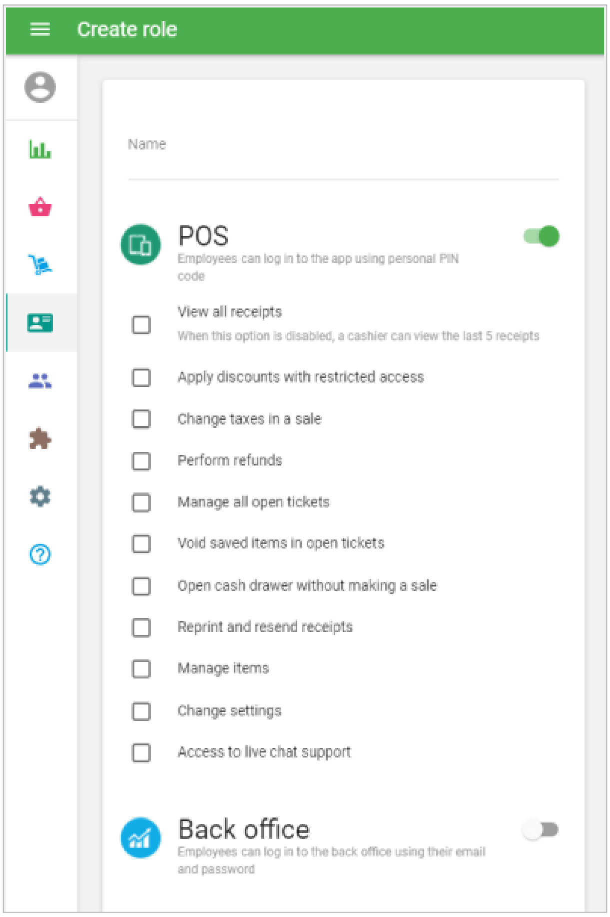
You can assign a role to the employee during creation or change the role of existing employees.

There are two blocks of access rights: POS and Back office.

5.2.1 POS access rights

You can create a new group by clicking the ‘+ Add role’. Fill in the Name field of a new role. Note that there cannot be two access groups with the same role name.

1



You can assign the access rights to the group using the checkbox.

View all receipts
When this option is disabled, the employee can only view the 5 most recent receipts. You can use this access restriction to forbid your employees to see and make refunds for older receipts. See details in Receipts List in the POS.

Apply discounts with restricted access
When this option is disabled, the employee does not have the right to use the restricted discounts. See details in How to Create and Configure Discounts.

Change taxes in a sale
When this option is disabled, the employee cannot change taxes, applied to the items during sale.

Perform returns
When this option is disabled, the employee cannot make refunds. Such an employee would not have the ‘Refund’ button in the edit receipt window in the Receipts section of the POS. See detail in How to Issue a Refund on Loyverse POS

Manage all open tickets
If enabled, the employee can view and edit open tickets created by other employees.

Void saved items in open tickets
Deselect if you want to forbid your employees from deleting saved open tickets or deleting items from them. See details in Open tickets

View shift report
You can select whether the employee can see the shift report with the expected amount of cash or not, during and when closing shift. See details in Shift Management in Loyverse POS

Open cash drawer without making a sale
If enabled, the employee will have the ‘Open cash drawer’ button in the menu at the Sale screen of POS. See details in How to Connect a Cash Drawer

Reprint and resend receipts
If enabled, the employee can reprint receipts and resend them via email

Manage items
If enabled, the employee can add and edit items and categories in the POS. See details in [How to Add Items in the Loyverse Back Office]

Change settings
Employees with this right can access the Settings at the POS, where it is possible to connect printers, CDS, and KDS.

Access to live chat support
Employees with this right can access chat support.

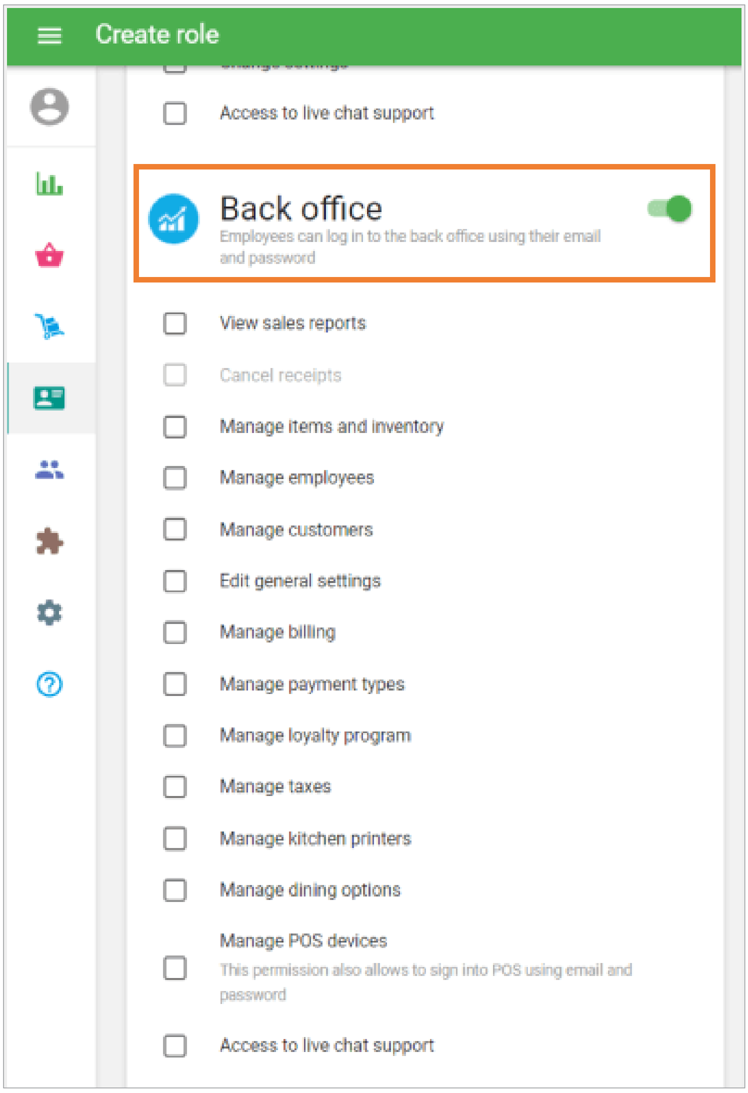
When an employee tries to access a function on the POS that they do not have the access to, the PIN-panel will be opened with the request to enter the PIN. After entering the PIN code of an employee who has access to the function, a one-time access is granted to the employee who does not have access to the function.

5.2.2 Back Office access rights

If you want to give the user group an access to the Back Office, switch on the Back Office in the form. After that, you will see the list of access rights to the Back Office.

Active checkbox opens access to the corresponding section of the Back Office.

1



View sales reports
Gives employees the right to access the Reports menu
Cancel receipts
Gives employees the right to access the Cancel receipts functionality in the Receipts section in Reports

Items (Manage items and inventory)
Gives employees the right to access the Items menu and receive a low stock notifications. In the case of an active Advanced Inventory subscription, it gives employees the right to access the Advanced Inventory menu.

Manage employees
Gives employees the right to access the Employees menu.

Manage customers
Gives employees the right to access the Customers menu. See details in How to Work with Customer Base in the Back office

Edit general settings
Gives employees the right to access the Features section in Settings. See details in Setting Up Your Shop in Loyverse Back Office

Manage billing
Gives employees the right to access the Billing & subscription section. See details in How to Use Add-on Services of Loyverse POS

Manage payment types
Gives employees the right to access the Payment types section. See details in Configuring Payment Types in Loyverse POS

Manage loyalty program
Gives employees the right to access the Loyalty section in Settings. See details in How to Set Up a Customer Loyalty Program

Manage taxes
Gives employees the right to access the Taxes section in Settings. See details in How to Configure Taxes in the Back Office

Manage kitchen printers
Gives employees the right to access the Kitchen printers section in Settings. See details in Using Kitchen Printers with Loyverse POS

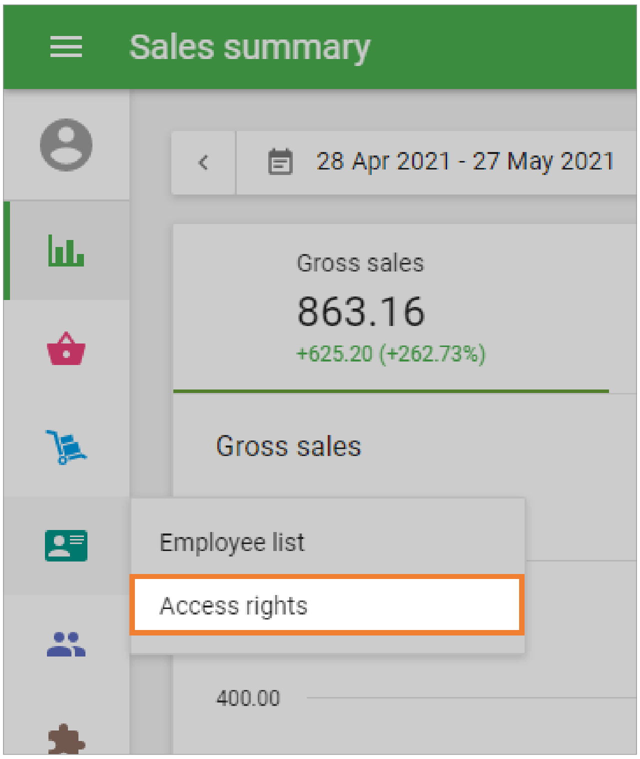
Manage dining options
Gives employees the right to access the Dining options section in Settings. See details in Dining Options

Manage POS devices
Gives employees the right to access the POS devices section in Settings.
This permission also allows them to sign in to POS using email and password. See details in How to Give Employees Access to Login into Loyverse POS through E-mail
Access to live chat support
Gives employees the right to access to live chat support

5.3 How to Give Employees Access to Login into Loyverse POS through E-mail

5.3.1 Make access rights for group

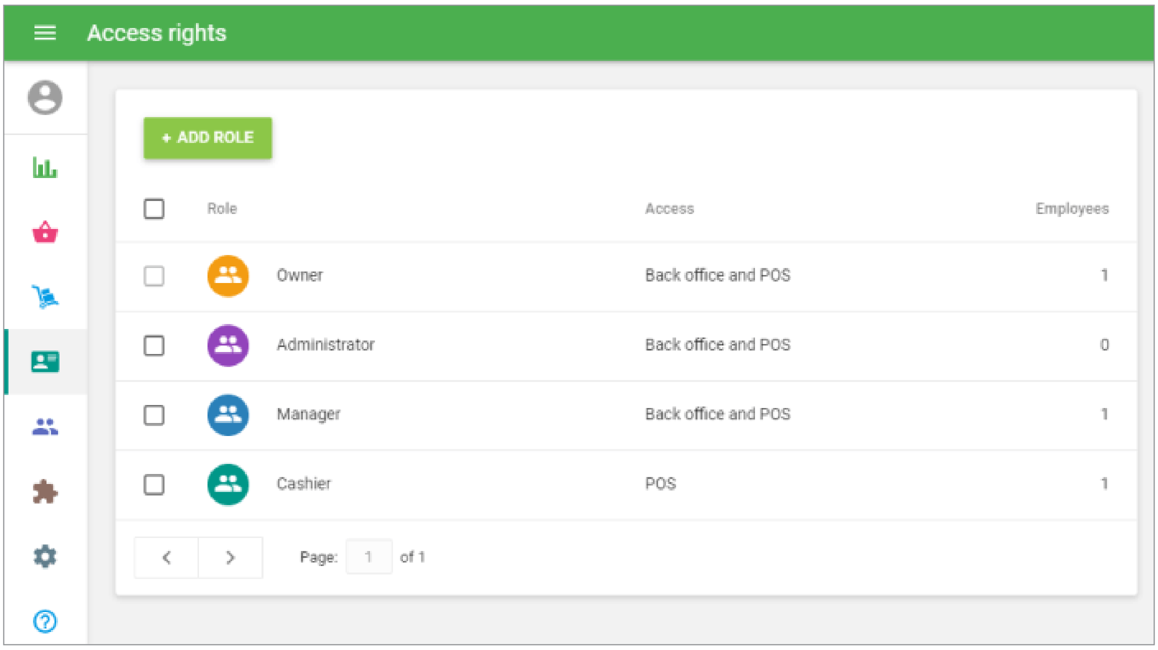
1



Go to ‘Access rights’ menu at ‘Employee' section in the Back Office.

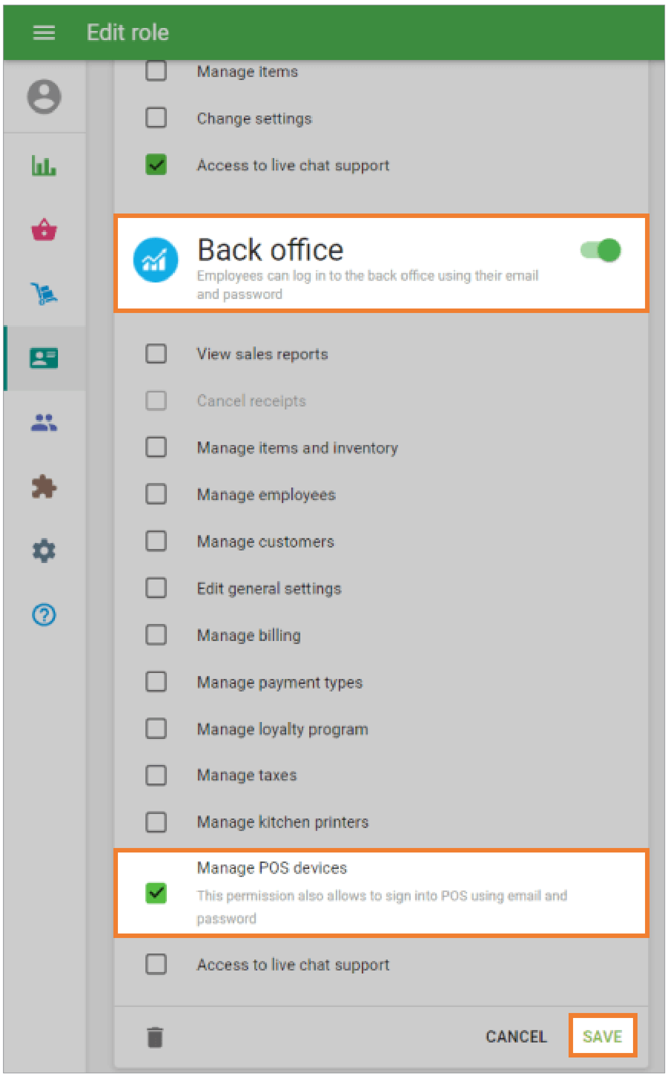
Choose an existing group with your employees or create a new role.

2



Switch on ‘Back office’ option and check in box ‘Manage POS devices’.

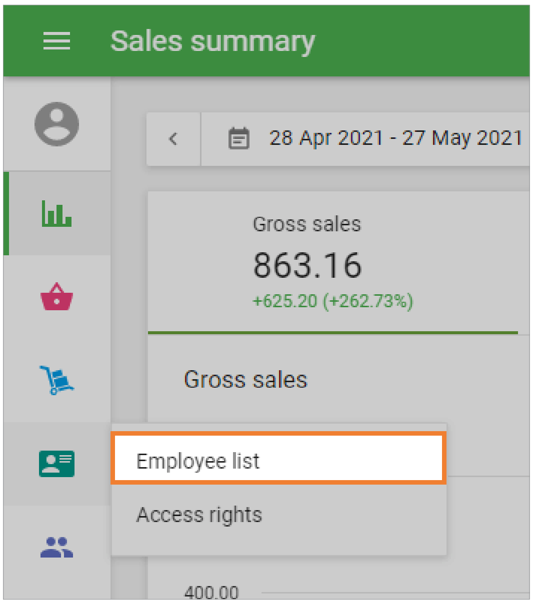
3



5.3.2 Assign employee to the group

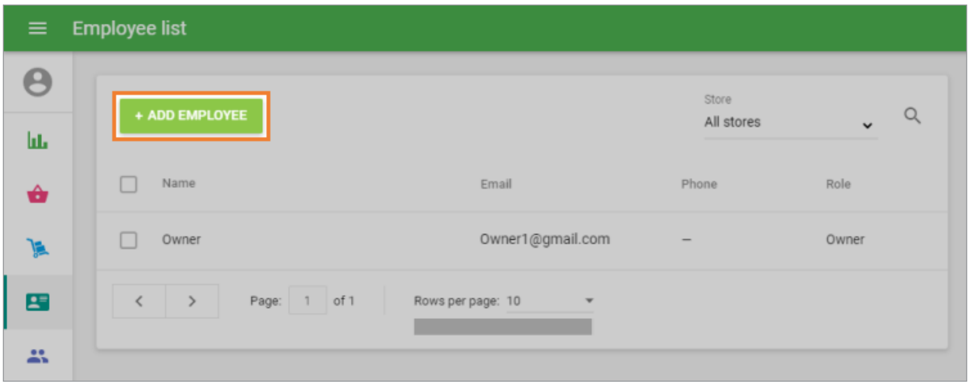
Go to the ‘Employee list’ in the ‘Employees’ section.

1

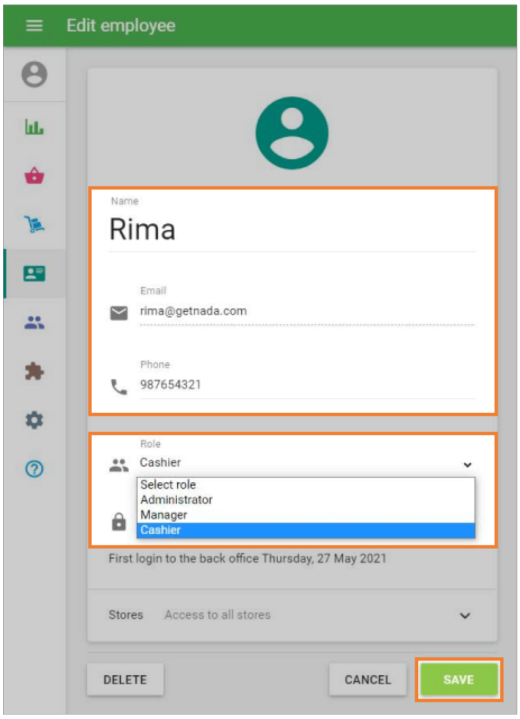


Create Employee by clicking on the 'ADD EMPLOYEE" button. If you have created employee before, open it for editing.

2



3

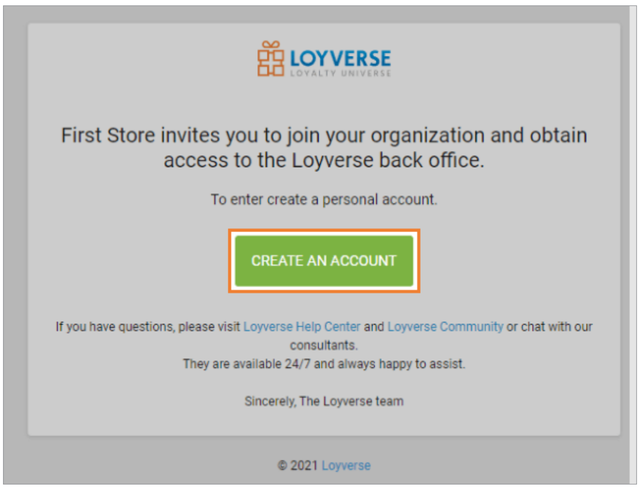


At the 'Edit employee' window fill in employee's name, email address, phone number and the role (the group that you created in the first step).

5.3.3 Creating password by employee

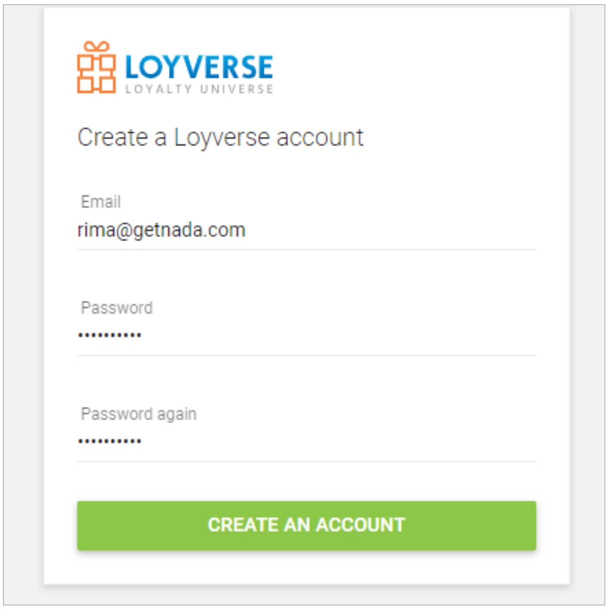
The employee will receive Email with an invitation to obtain access to the Back Office. He or she should click the 'Create an account' button.

1



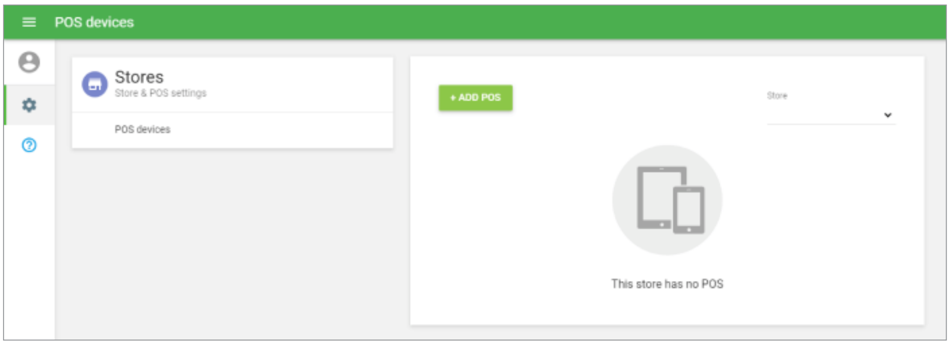
The employee will be redirected to the Back office form, so he/she has to fill in a password to create an account.

2



When the employee enters the back office, it means the account is created.

3

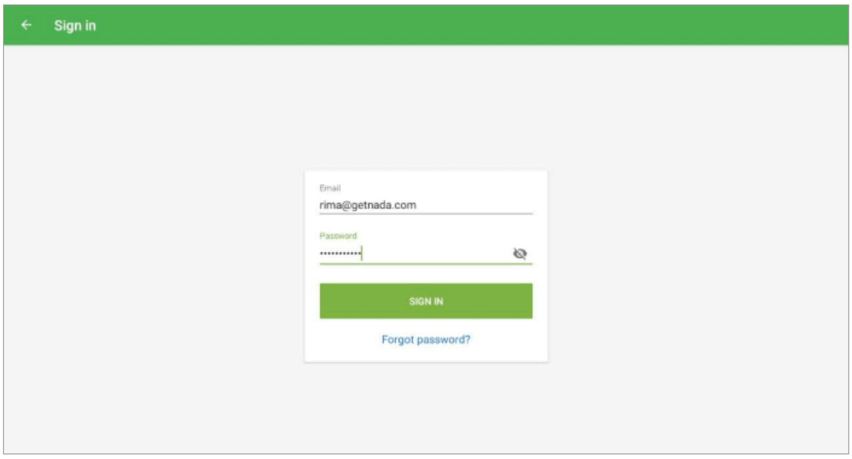


If you don’t assign to this employee group any other access rights, then your employee will not see and manage any other information in the Back Office except POS devices.

5.3.4 Login into Loyverse POS

Now an employee can login into Loyverse POS at the mobile device with his/her E-mail and password, created at the previous step.

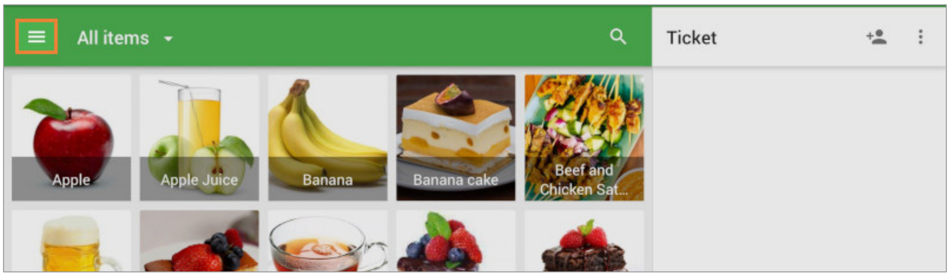
1



5.4 How to Switch User Account to Different Employee in the Opened Loyverse POS

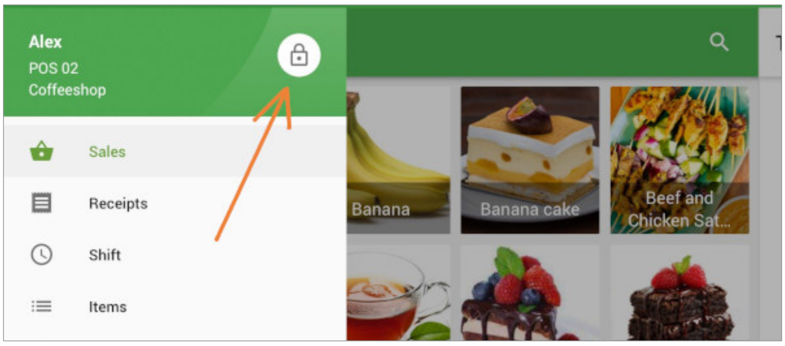
If you want to switch the user account to another employee in an already opened Loyverse POS app without exiting, you need to go to Menu.

1



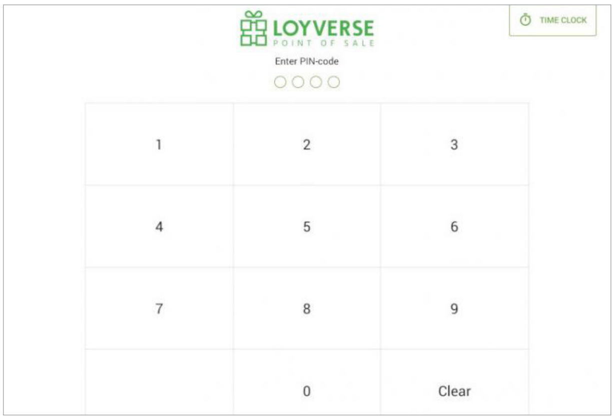
Then, tap on the lock icon.

2



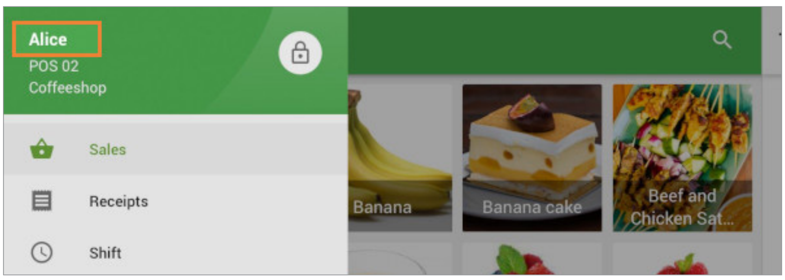
Once the pin pad is open, a different employee can enter his or her own pin to log in.

3



The active app account has switched to another user, and you can see his or her name on the menu header.

4



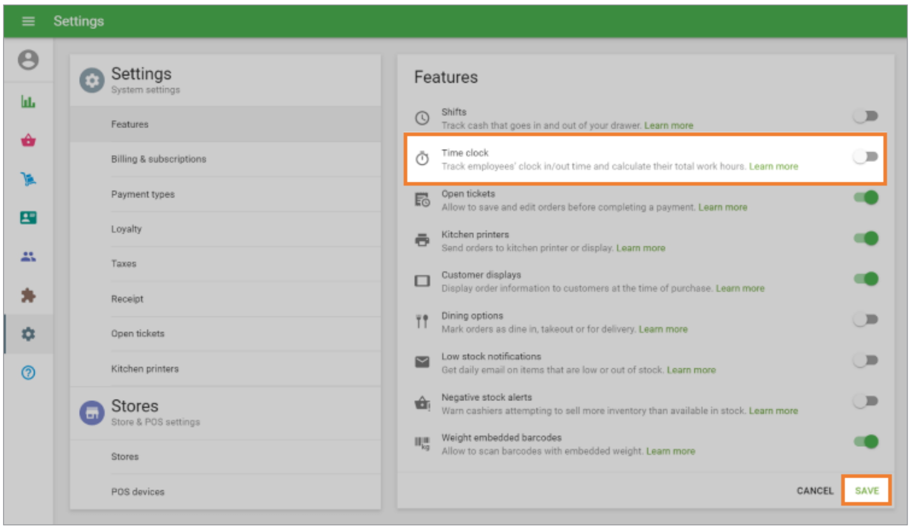
5.5 Using Time Clock to Track Employees Hours

This feature allows employees to clock in/out and calculates their total work hours.

5.5.1 Configuration

Login to the Back Office, navigate to the Settings menu, Features section, and switch the 'Time clock' slider on.

1



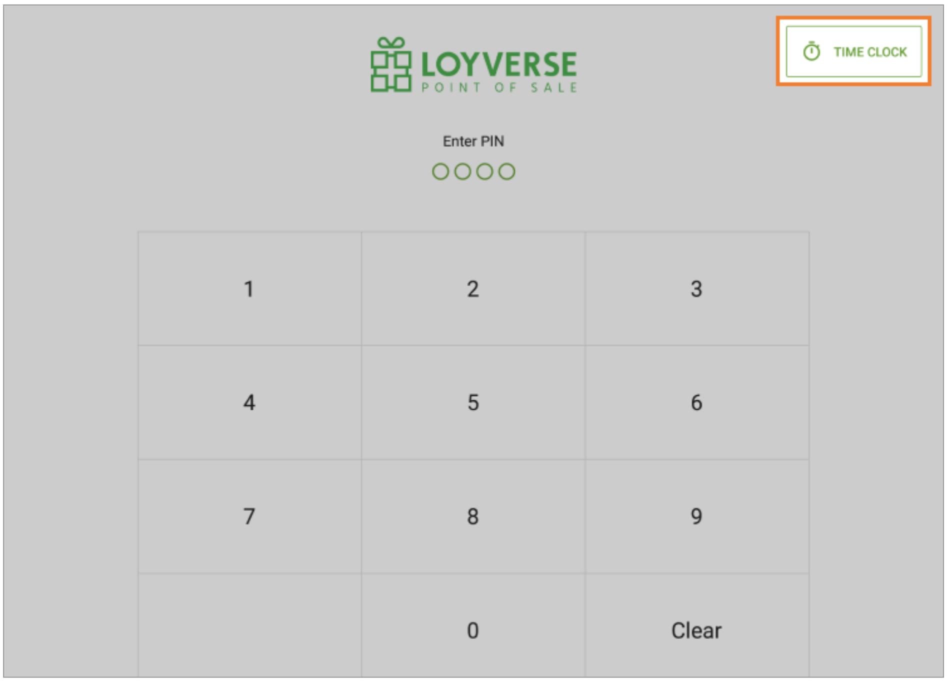
Don't forget to save changes.

The time clock feature requires authentication by PIN. Set your PIN to enter Loyverse POS app if you have not.

5.5.2 Using at POS

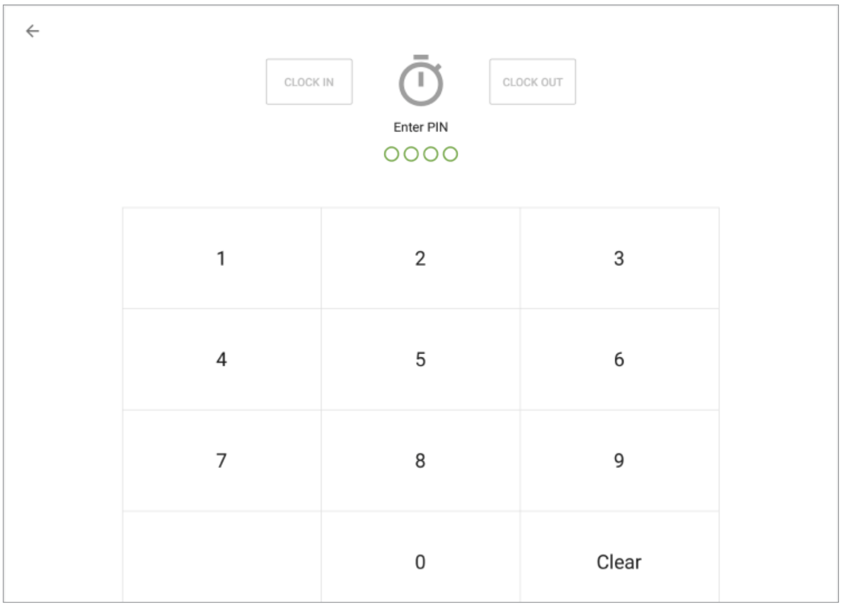
At the Loyverse POS app tap the 'Time clock' button in the top right of the login screen.

1



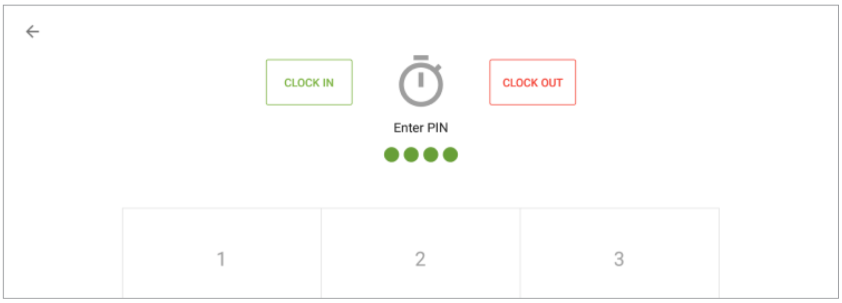
Enter PIN-code on the number pad.

2



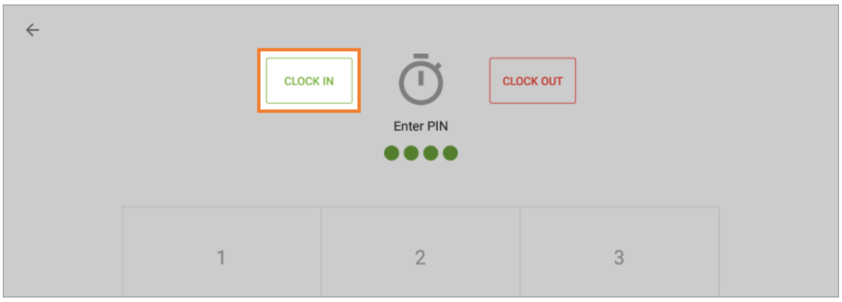
Then ‘Clock In’ and ‘Clock Out’ buttons become active.

3



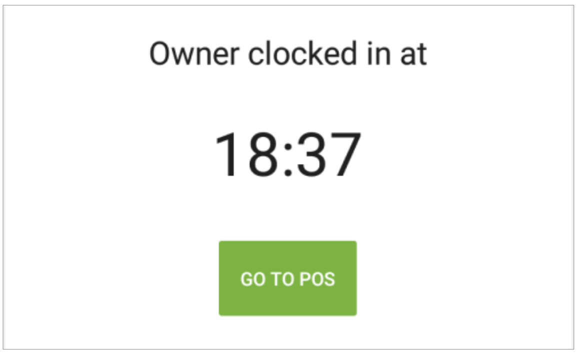
Tap ‘Clock In’ button to start tracking hours and record a time punch.

4



Then you will see information about the clock in time.

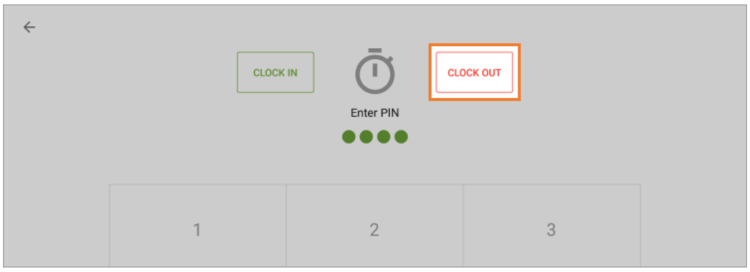
5



Tap to ‘Go to POS’ button to go to the sale screen of the app or back arrow to come back to login screen.

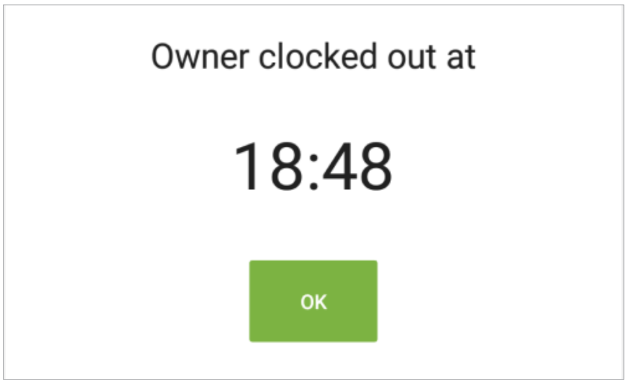
After finishing work go to ‘Time clock’ screen, tap ‘Clock Out’ button to record a time punch.

6



Then you will see information about clock out time.

7

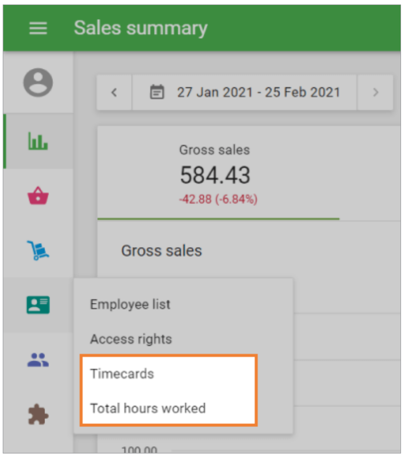


Tap to ‘OK’ button.

5.5.3 Reports at the Back Office

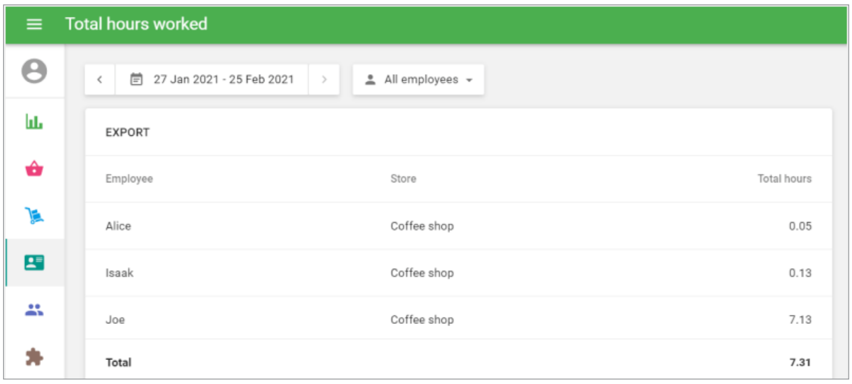
There are two sections in 'Employees' menu connected to Clock in/Clock out option: ‘Timecards’ and ‘Total hours worked’.

1



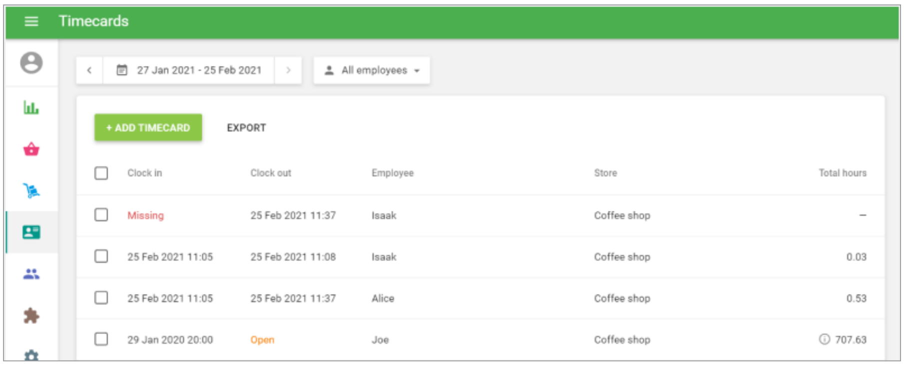
‘Total hours worked’ section shows summary report of each employee in the chosen period.

2



At the 'Timecards' section you can see the list of timecards.

3

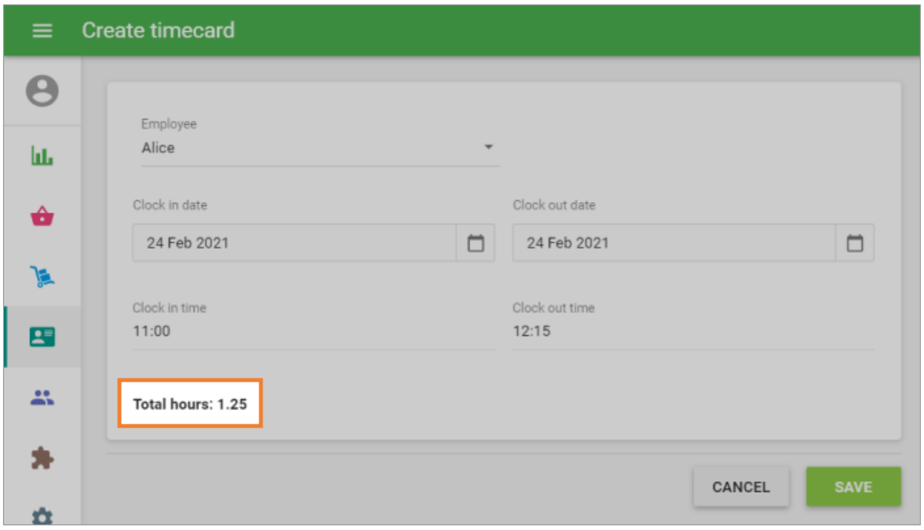


You can correct the current timecard or create a new one by clicking on 'Add Timecard' button. Total hours are automatically calculated based on clock in and clock out time.

Note

The decimal in 'Total Hours' shows a fraction of an hour, not minutes.

4

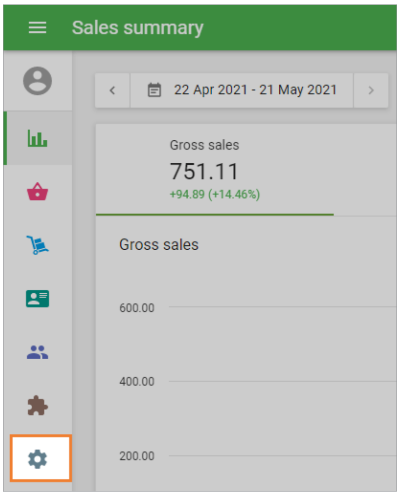


6. Customers

6.1 How to Set Up a Customer Loyalty Program

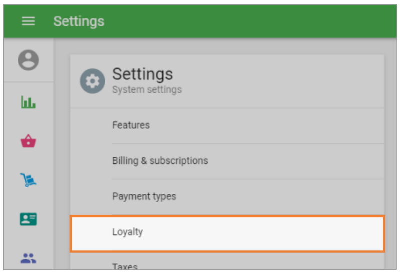
Loyalty programs motivate customers to make recurring purchases as they create the opportunity for you to take customer relationships to greater depths and also reward their visits with bonus points.
To set up the reward program, login to the Back Office.

1



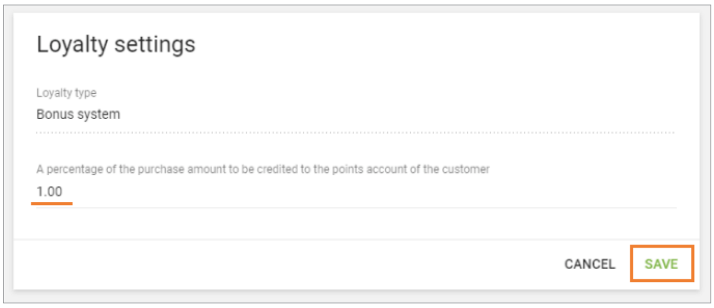
Then in the Settings menu, click the 'Loyalty' button.

2



A basic program offers 1 point for 1% of the amount spent, but of course, you can modify the percentage according to your preference. Don't forget to press 'Save'.

3

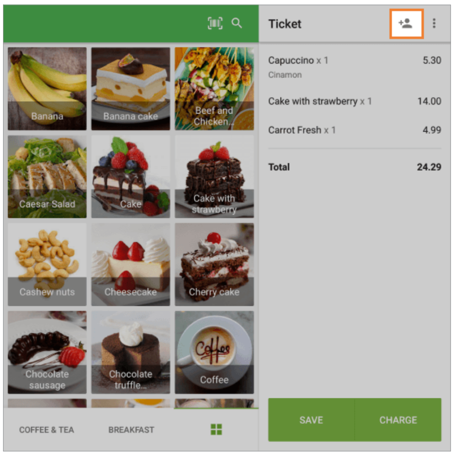


Your loyalty program is ready to go! All you need now are some customers! They'll be happy to know they can now collect bonus points at their favorite small business.
Your store is well on its way to success!

6.2 How to Sign Up a Customer in Loyverse POS

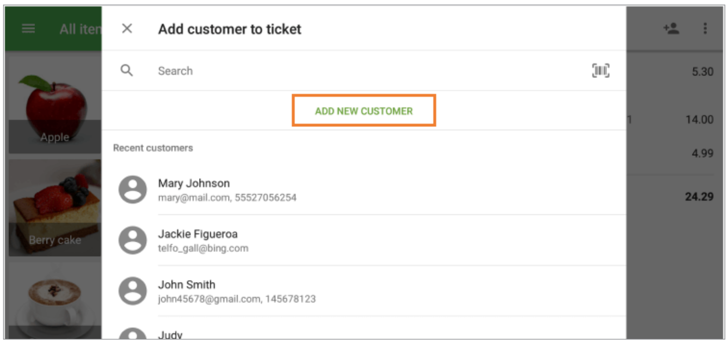
Loyverse POS app provides you with the possibility of connecting sale records with customers. It allows you to send receipts to customers via email. If you have already set up the [loyalty program](), you can give bonus points to registered customers for every purchase, to be redeemed for discounts.
When [making sales]() in the Loyverse POS app, you can sign up a new customer.
Click the ‘Add client’ icon at the top right-hand corner of the sale screen.

1



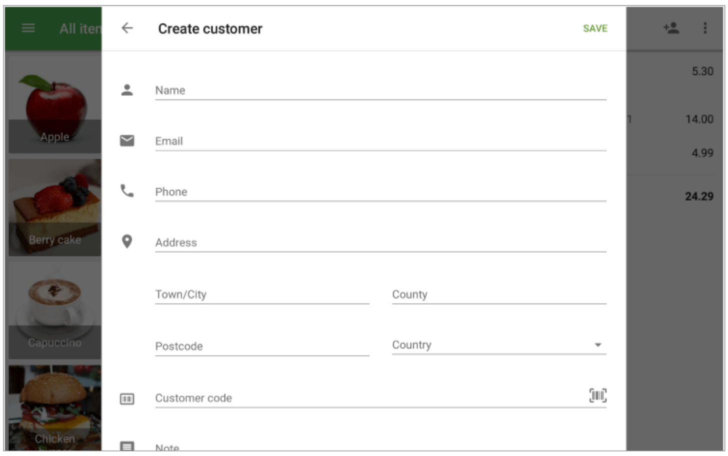
In the pop-up window, you can select the existing customer or add a new one by clicking on ‘Add new customer’.

2



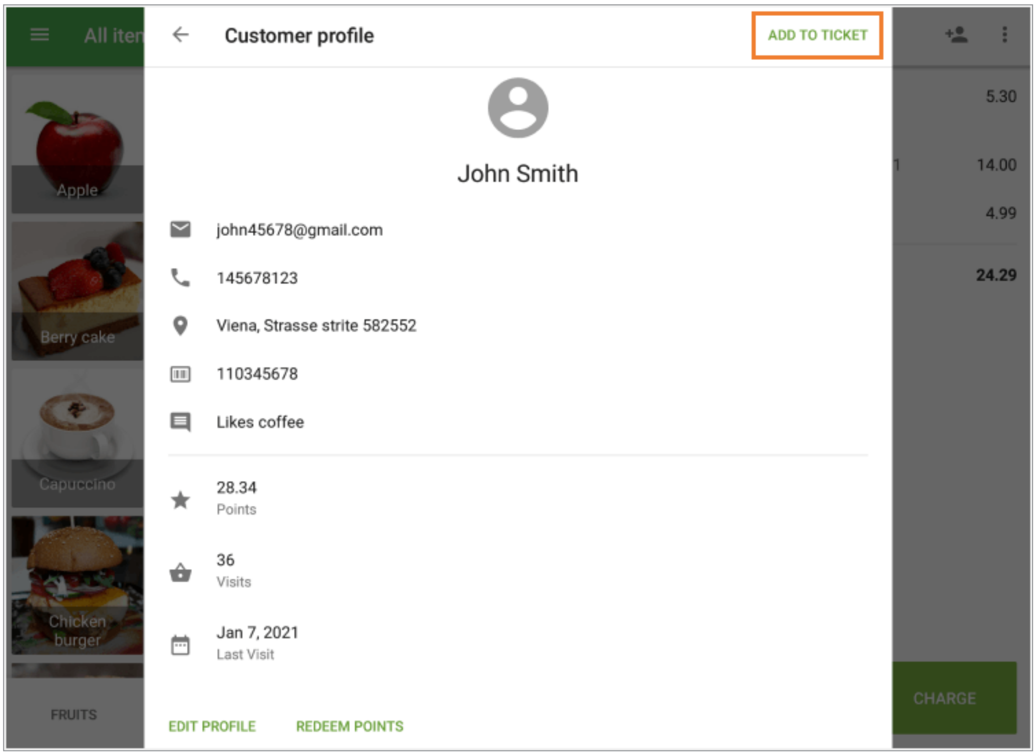
If you add a new customer, fill in the ‘Create customer’ form. You must fill in at least one of the fields: Name, Email, or Phone to identify a customer, and other fields are optional.
Tap ‘Save’.

3



Check the information about your customer and tap ‘Add to ticket’ at the top-right hand corner.

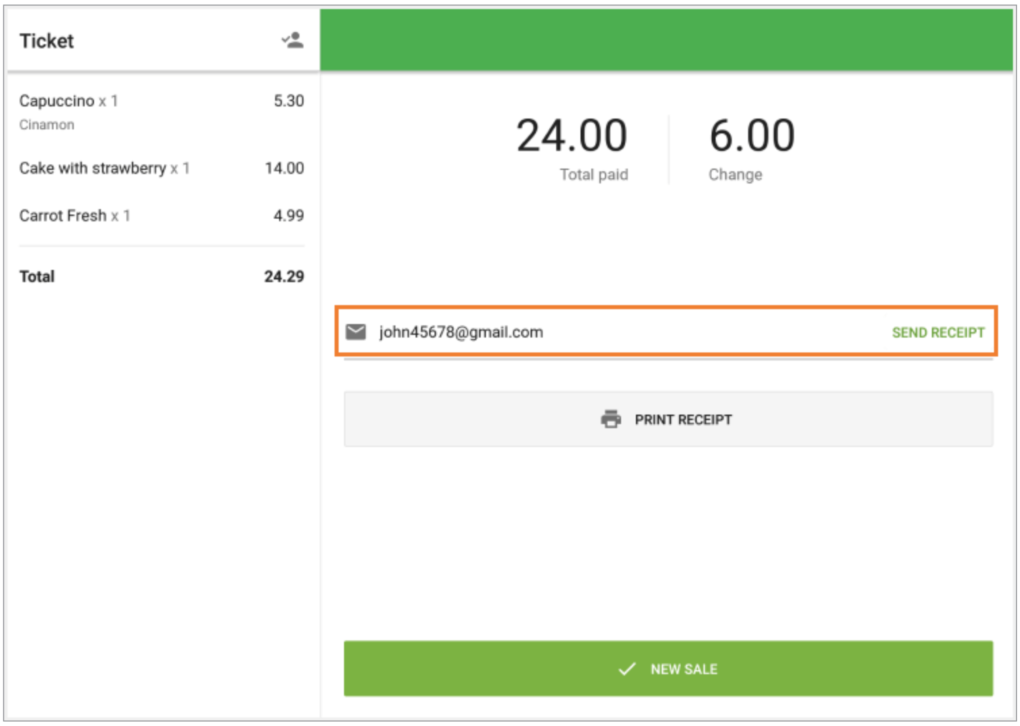
4



After the customer is signed up, proceed with your sales as usual.

Then in the window after choosing the payment type, you will see a customer’s email. Tap ‘Send receipt’ button to send the receipt to the customer via email.

5

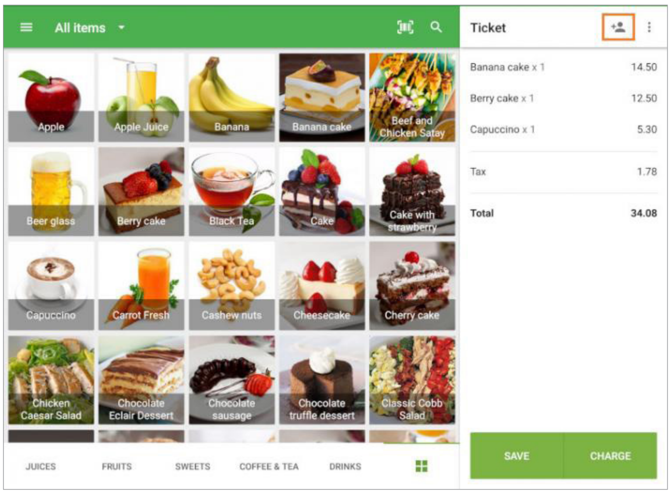


Tap the ‘New sale’ button to return to the sale screen.

6.3 How to Redeem Customer Points for a Discount

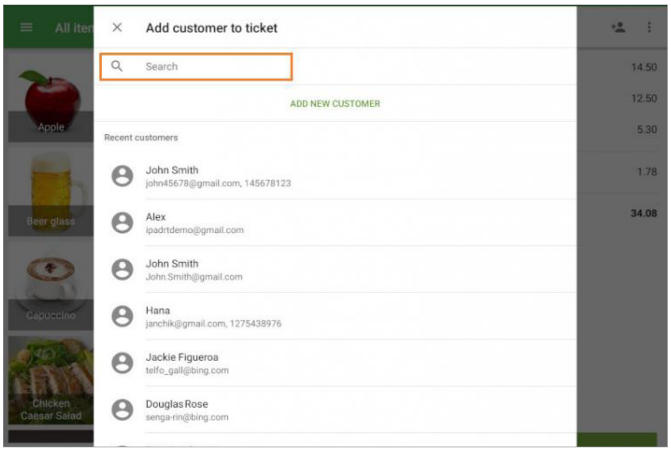
At the sale screen, add items to the ticket and click the ‘Add client’ icon at the top right-hand corner of the sale screen.

1



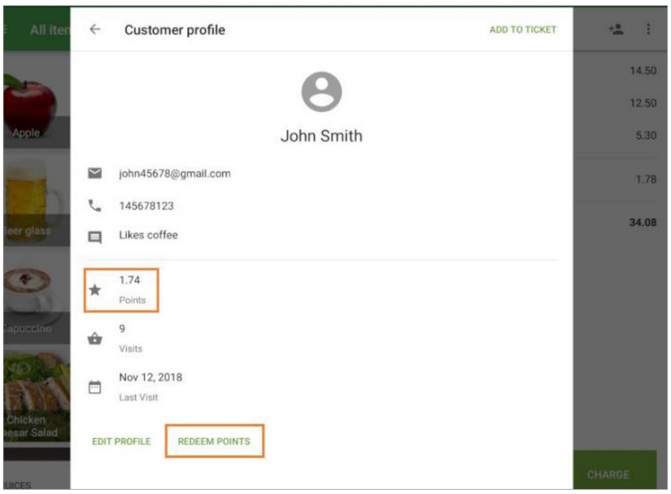
In the pop-up window, select the existing customer from the list of recent customers. You can use the search field to find the customer by name, email or number.

2



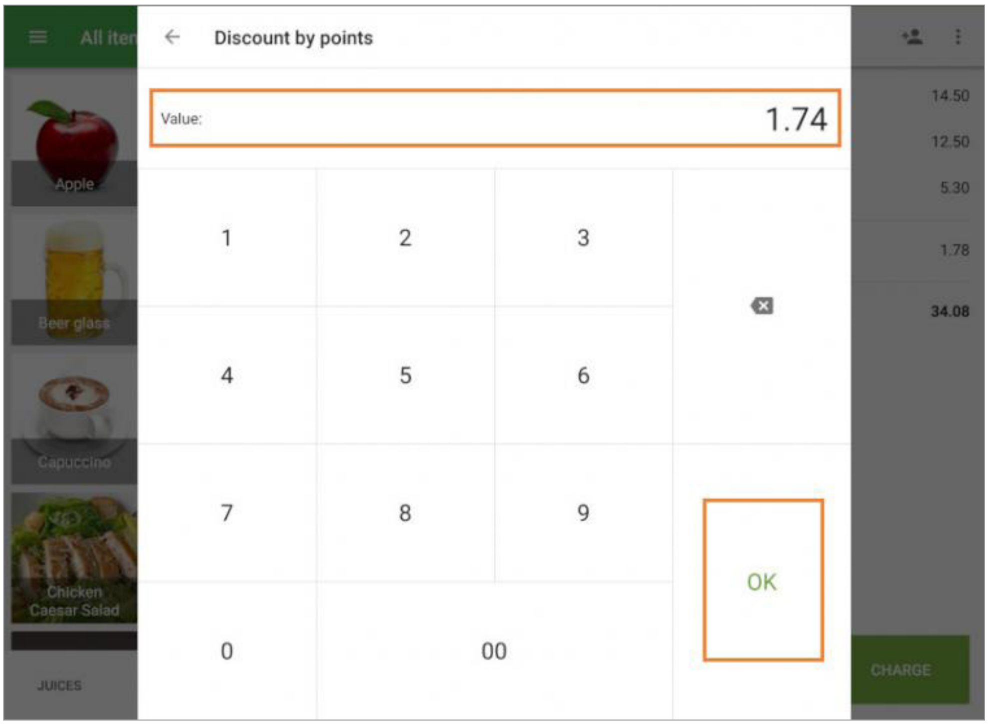
After you have selected the customer, you can see his/her profile with the number of points available for redemption. Tap ‘Redeem points’

3



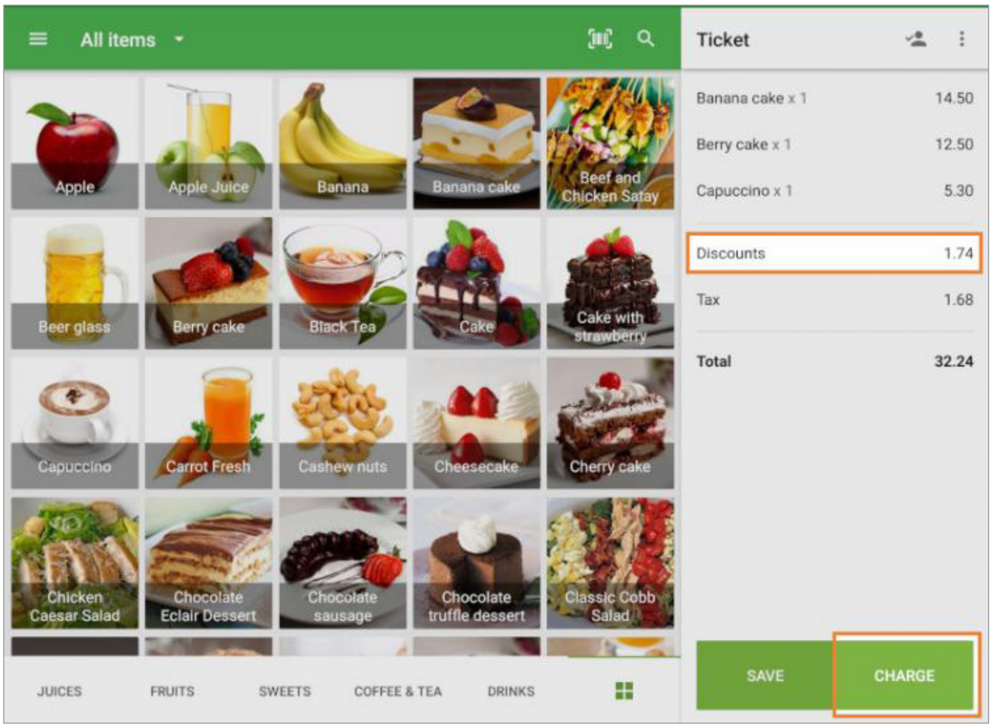
The app will show you the maximum redeemable value. But as clients wish, you can enter a lesser amount using the number pad. After tapping ‘OK’, the points will be applied and the purchase amount will be reduced.

4



Then you'll see the receipt preview with the redeemed points in the discounts line. Tap ‘Charge’ to continue the sale as usual.

5

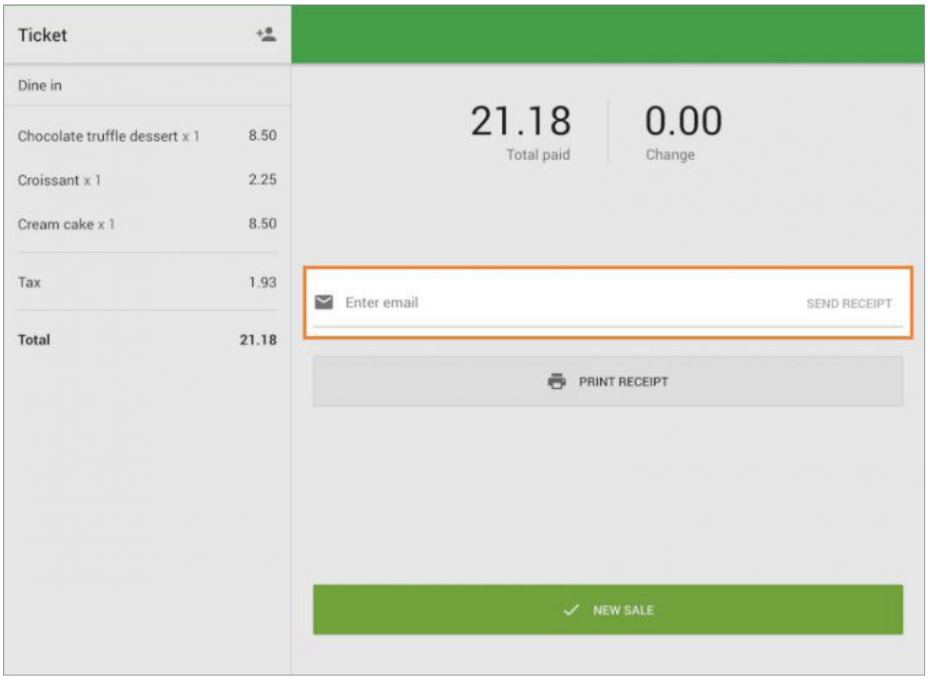


6.4 How to Send E-mail with Receipt to Client in Loyverse POS

After you enter the payment to receipt during sale, you can send a receipt to a customer by email.

Fill in the ‘Enter email’ field and tap ‘Send receipt’ button.

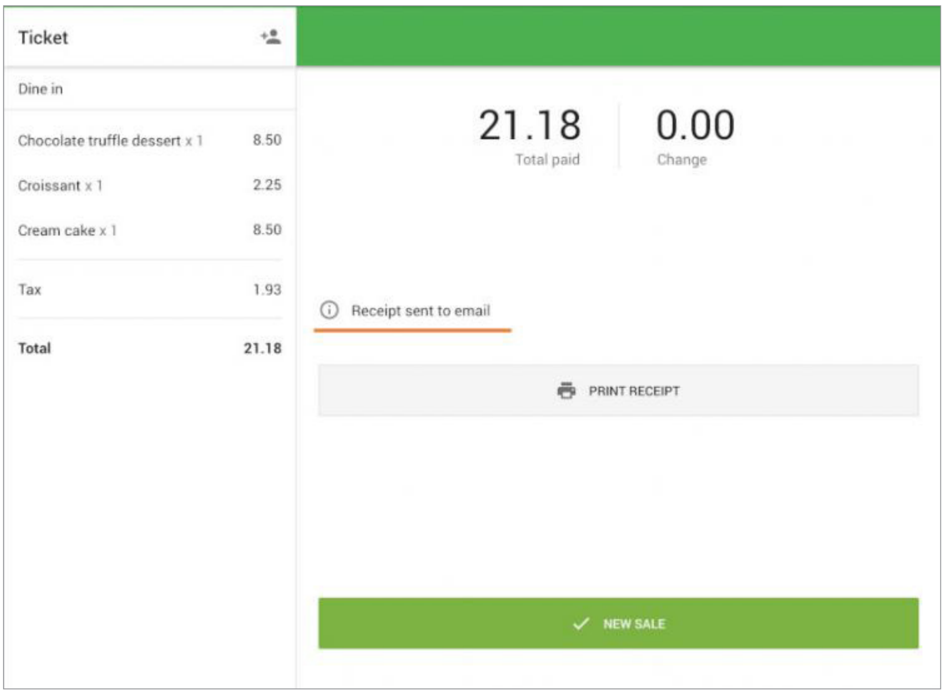
1



Please be attentive while entering the Email. If you make a mistake, the customer will not get the receipt.

After you see the message ‘Receipt sent to email’, you can proceed to a new sale.

2

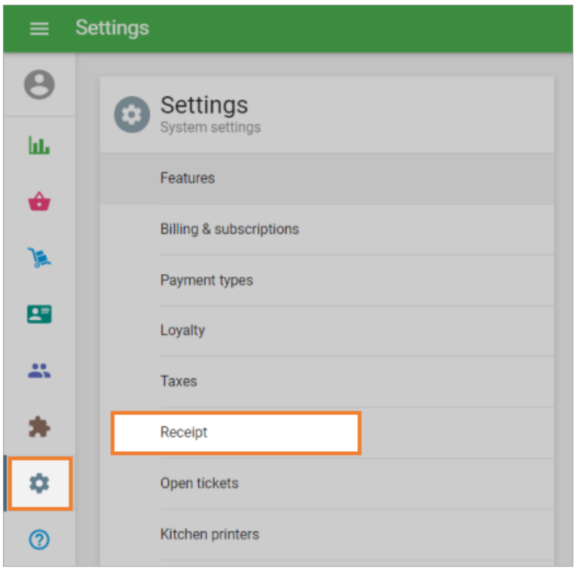


6.5 Information about the Customer and Comments in the Receipt

These settings only affect the display of information on the receipts for the clients, such as printed receipts, email receipts, and do not affect the format of receipts in the archive in POS and in the Back Office, where customer information and notes are always displayed.

Go to the ‘Receipt’ section in the ‘Settings’ menu in the Back Office.

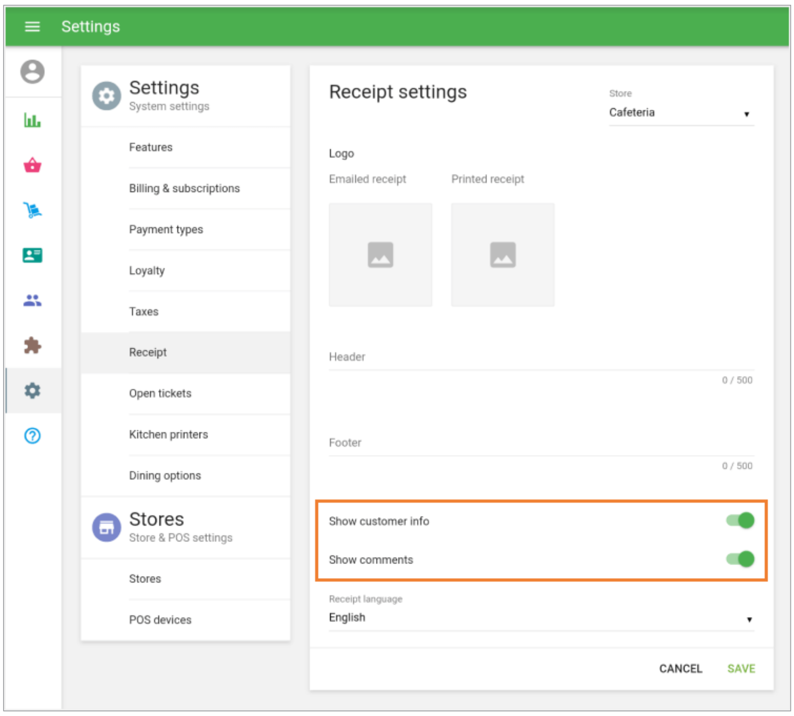
1



In the Receipt settings, switch on the ‘Show customer info’ option if you want to display the information of your registered customers on the receipts.

Switch on ‘Show comments’ option if you want to display the comments of the items and the ticket on the receipts.

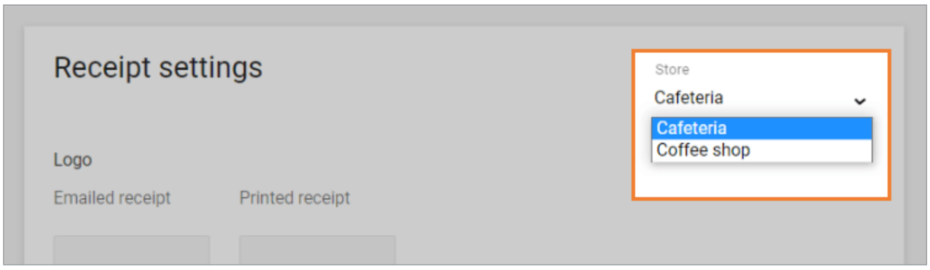
2



Don’t forget to save your changes by clicking on the ‘Save’ button.

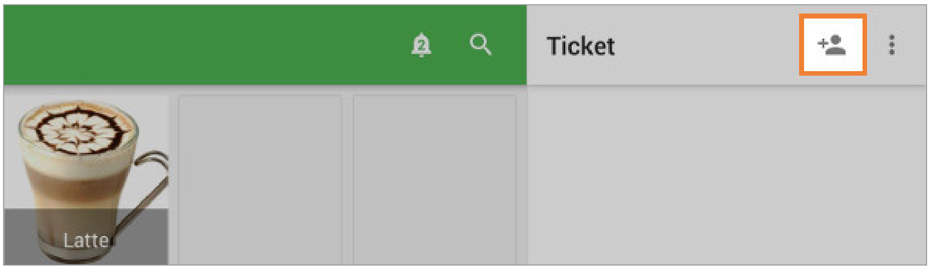
If you have several stores, you have to make these settings for each store by selecting the store’s name from the drop-down list and saving changes.

3



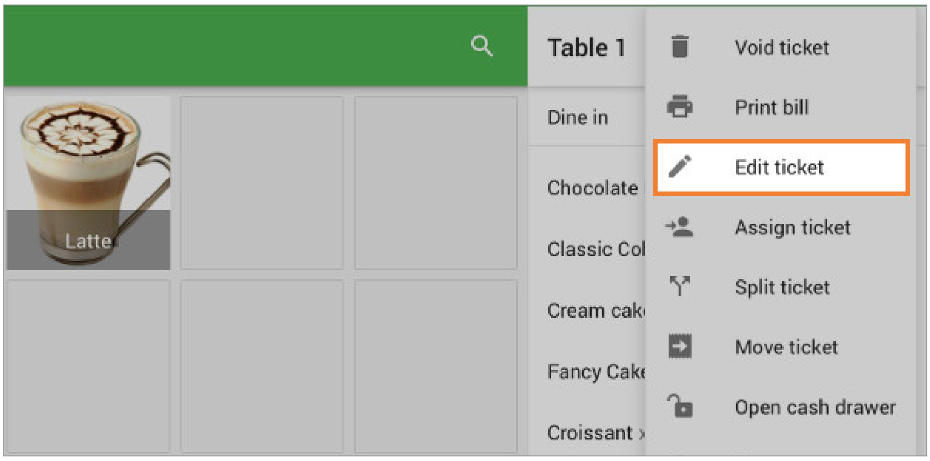
Now, during the sale, when you register a new customer or assign a ticket to an existing customer, the customer name and number will be printed on the receipt.

4



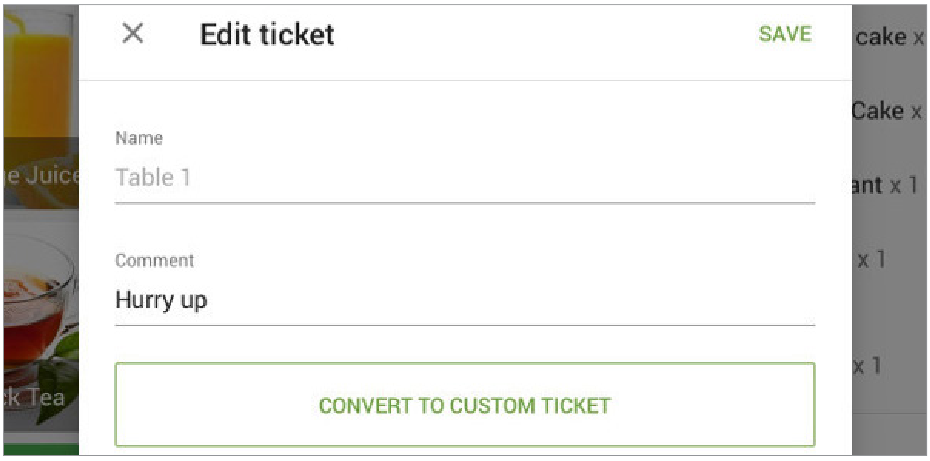
You can **add comments to the open ticket** by tapping on the ‘Edit ticket’ button under the menu (⁝).

5



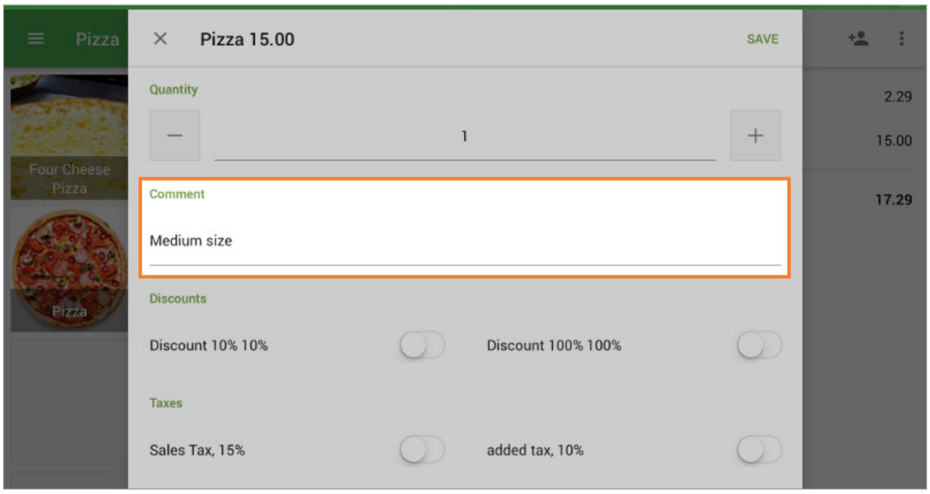
Type in the comment on the pop-up window and tap ‘Save’.

6



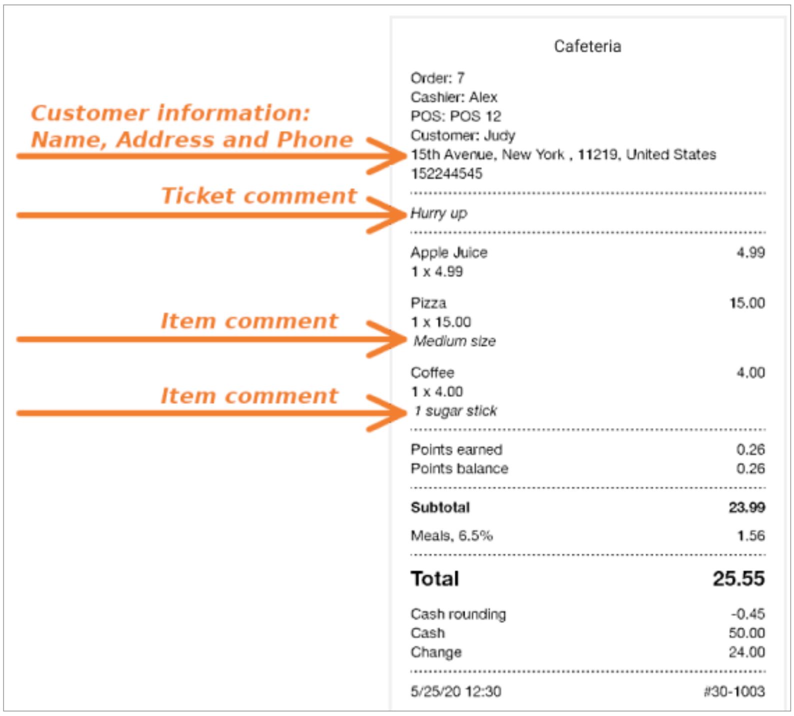
To **add a comment to the item**, click on the item in the ticket. Fill in the comment field in the pop-up window and tap 'Save'.

7



The Information about the customer (Name and Number) and notes (comment to the open ticket and comments to the items) will appear on the receipt.

8



Note

The item comments will be displayed on the refund receipt, but the ticket comments will not.

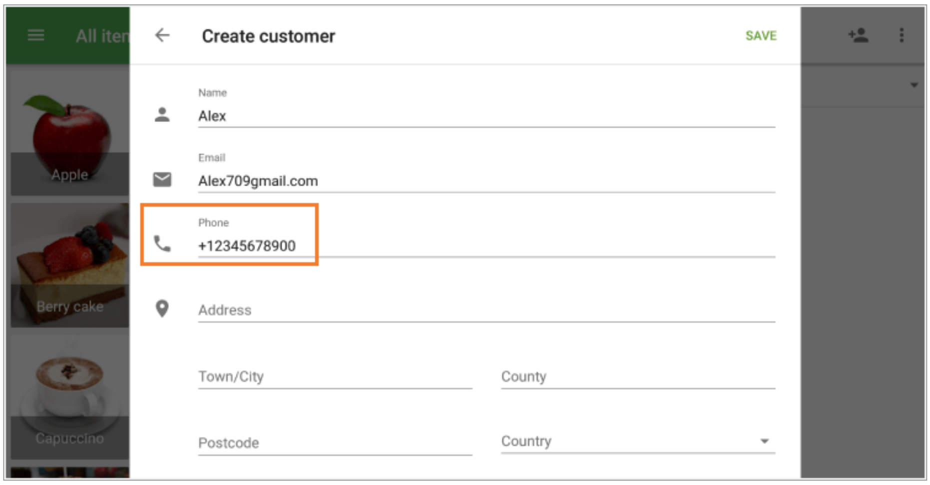
6.6 Customer Identification by Phone Number

If you specify a customer's phone number when you sign up a customer in Loyverse POS, you can identify your customer by their number during a sale.

Note

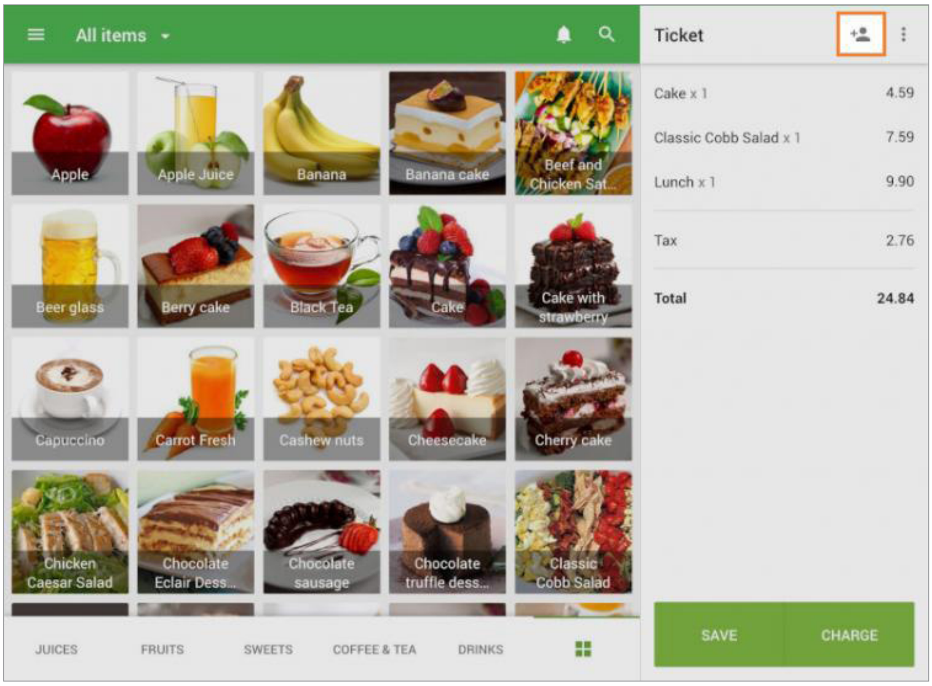
For customer registration, it may be enough to fill only one of the three fields: 'Name', 'Phone' or 'Email'. But sometimes, the customer's name is not unique. If you create multiple clients with the same name, it will be difficult to find the correct one. Therefore, we recommend you to fill in the fields 'Phone' or 'Email' as well.

1



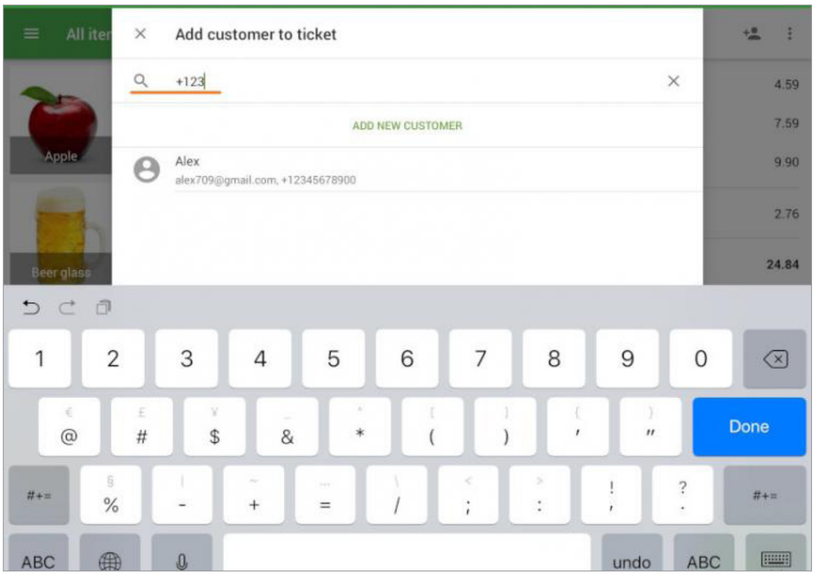
During a sale, tap the 'Add client' icon in the upper right corner of the screen.

2



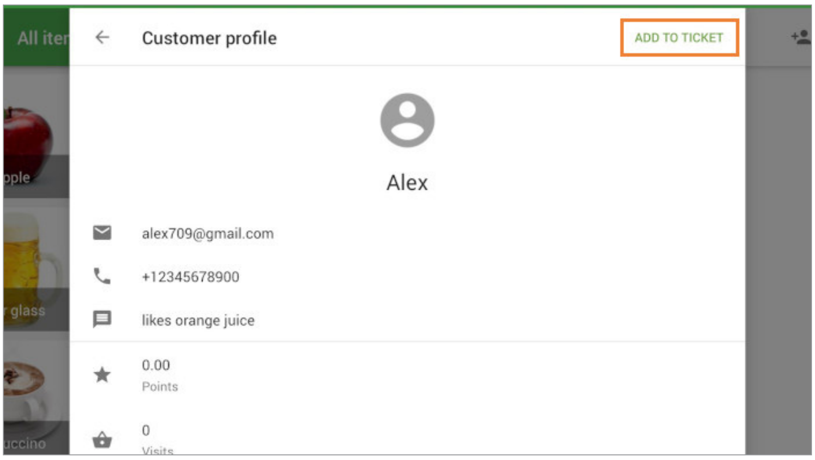
In the ‘Search’ field, start typing the customer’s phone number that you wish to find. Select your customer from the list.

3



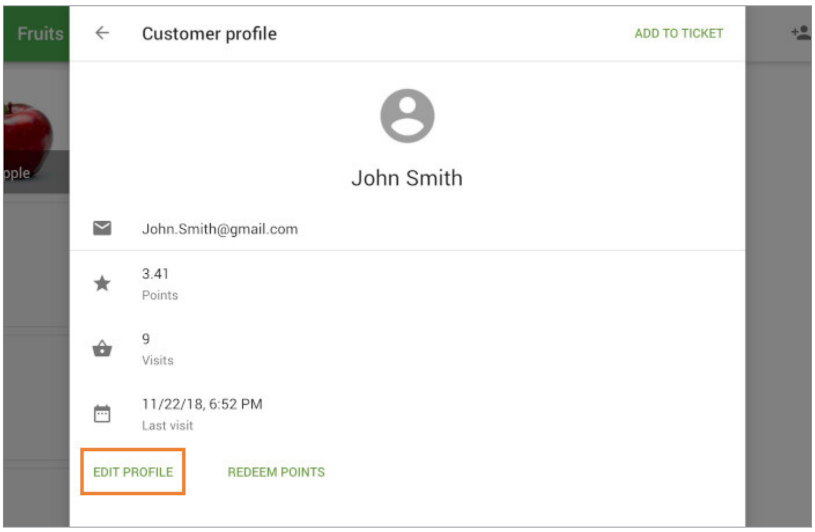
Tap ‘Add to the ticket’ button to connect the customer to the ticket.

4



The phone number can be assigned not only to new customers but also to clients created earlier. To do this, find the card of the customer, tap ‘Edit profile’ and edit it by specifying the phone number.

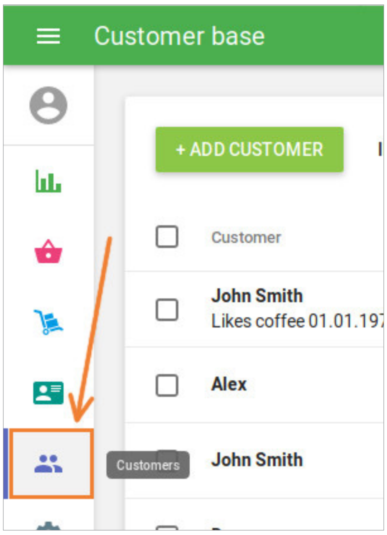
5



6.7 How to Work with Customer Base in the Back office

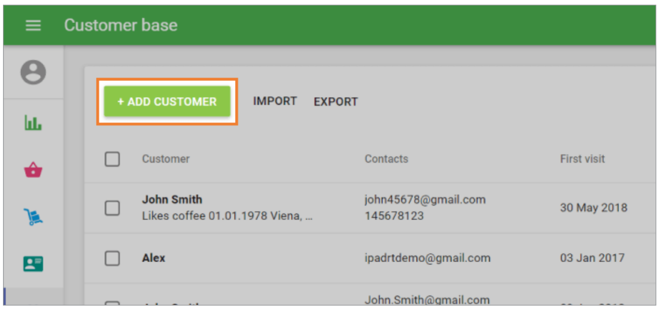
Enter the Back Office and open your 'Customer base'.

1



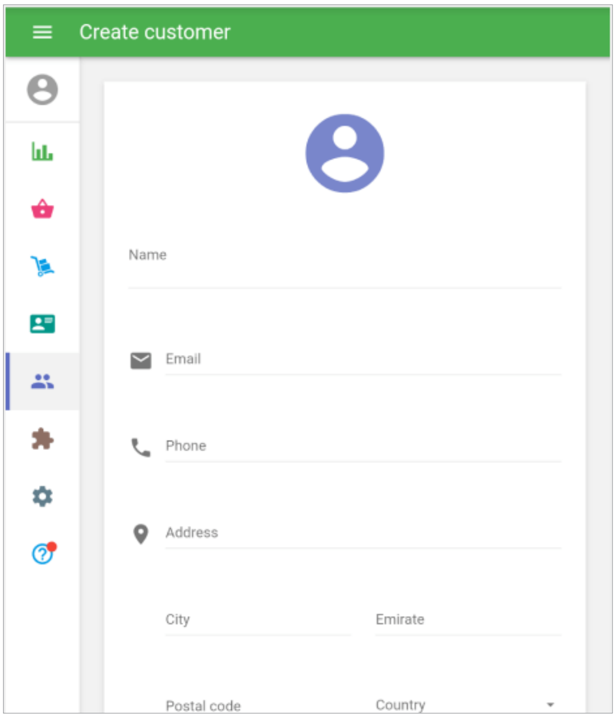
To create a new customer, click on the ‘+ Add customer’ button.

2



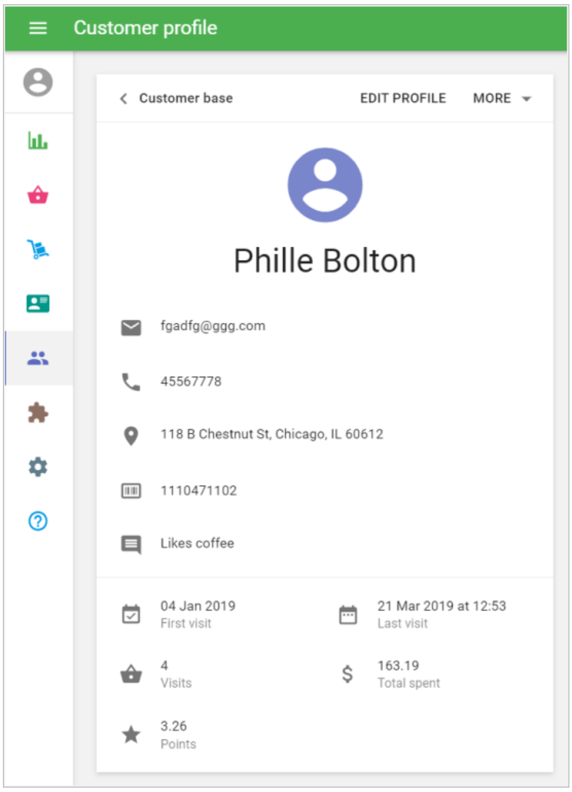
The form ‘Create customer’ will open for editing.

3



You cannot create a client without filling in one of the fields: Name, Phone or Email. You can also make some notes about the customer. After clicking on the 'Save' button, the Customer profile will be created.

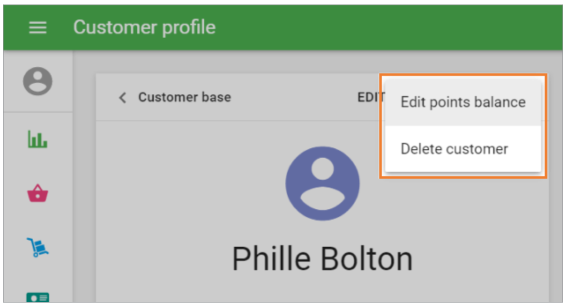
4



By clicking on the 'Edit profile', you can change the name, phone number, address, customer code and note.

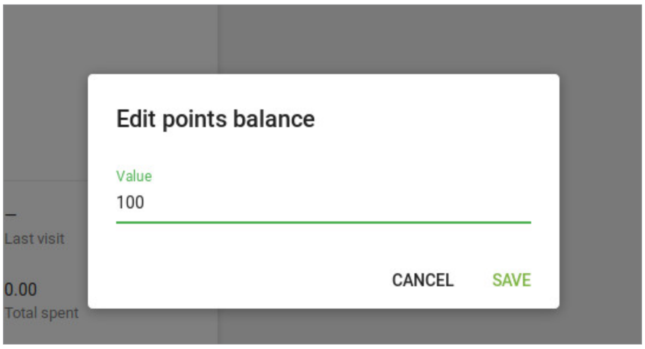
There is 'Edit points balance' and 'Delete customer' buttons in the 'More' menu.

5



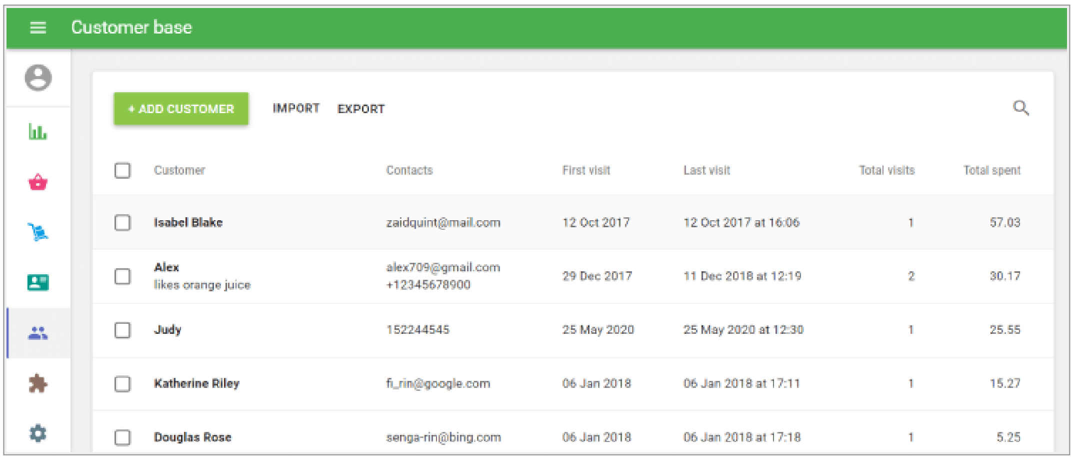
You can enter new points balance in the pop-up 'Edit points balance' form and click 'Save'.

6



You can also open the existing Customer profile by clicking on the needed customer from the customer base.

7

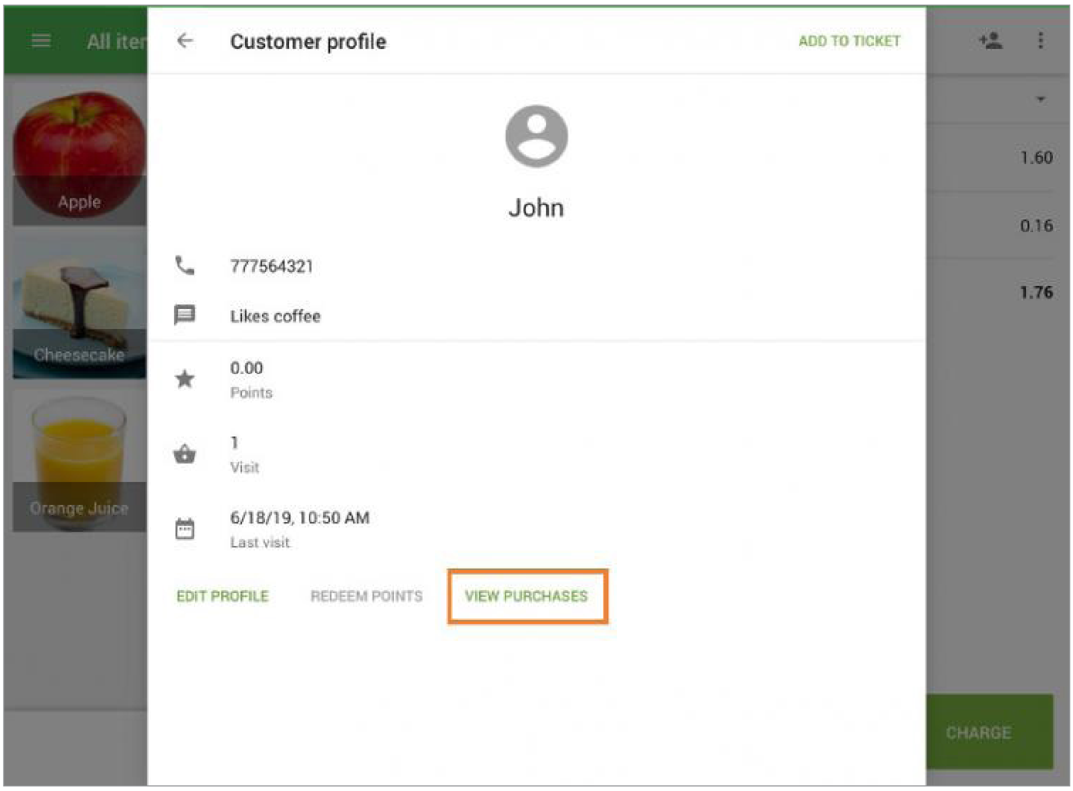


6.8 Purchase History of a Registered Customer in the POS

This feature makes it possible to see the purchase history of a registered customer during a sale at the POS.

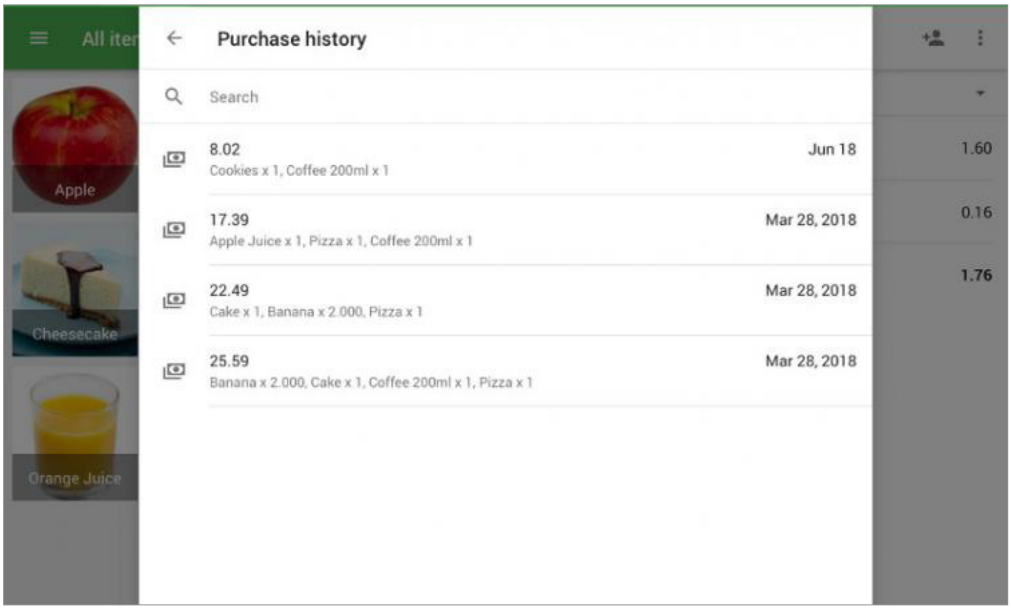
When making sales in the Loyverse POS app, add registered customer to the ticket. To see the purchase history of the customer, just tap the button “View purchases” on the customer profile.

1



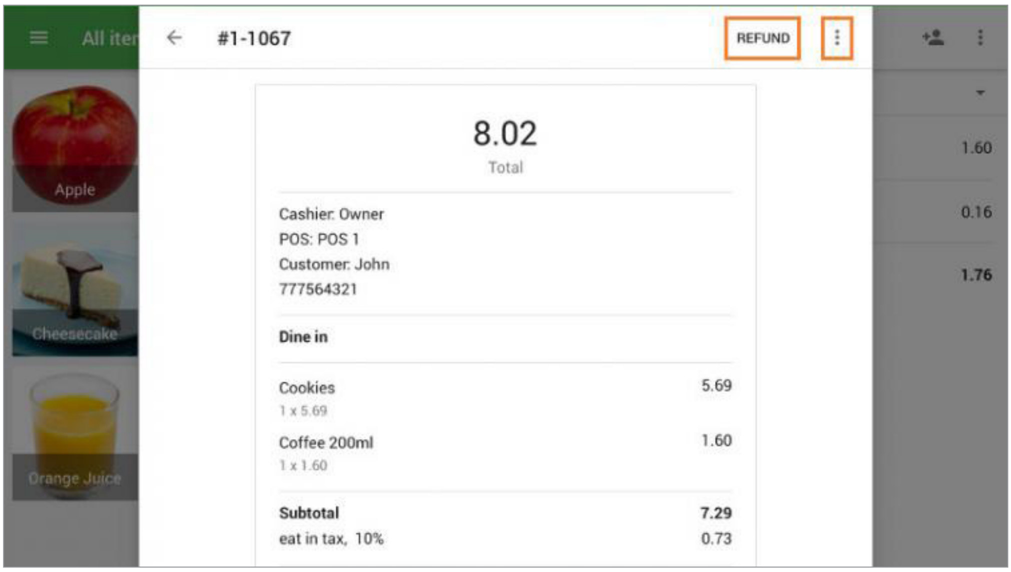
You will see the list of past receipts issued from this store, connected to the customer. Select to see details.

2

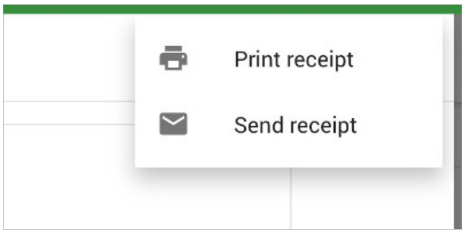


Once you open a selected receipt, you can make a refund, send the receipt by email (the button ‘send receipt’ is under the three dots menu) or reprint receipts (if a receipt printer is connected).

3



4



Note

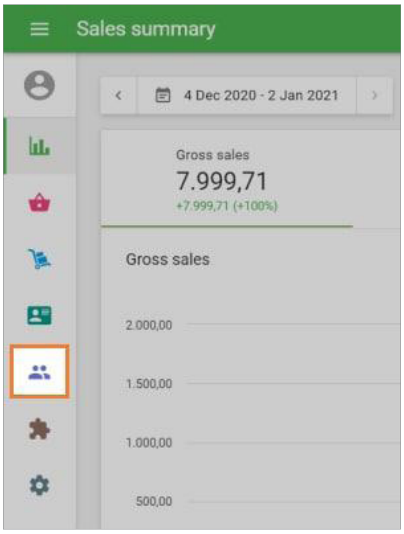
If there is no internet connection, you will only be able to see receipts with this client that were downloaded (to the device’s memory storage) prior to viewing the archive of receipts.

6.9 Importing and Exporting Customers

At the Loyverse POS app, you can manually add customers to the system and edit them. But if you would like to change or add many customers, importing and exporting functions at the back office will be quicker and more convenient.

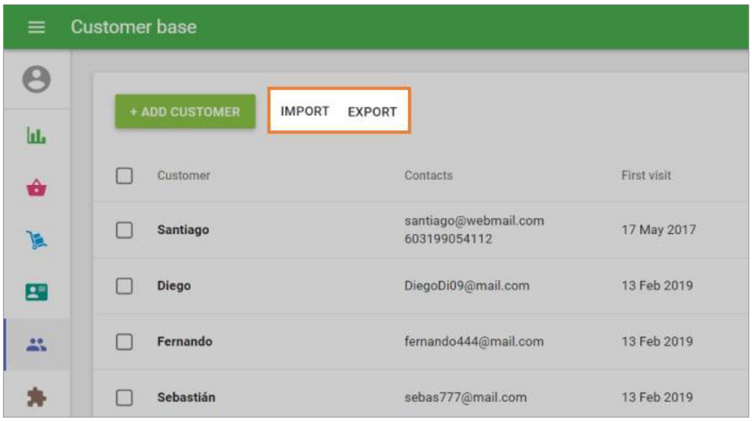
Enter the Back Office and open the 'Customers' menu.

1



There are ‘Import’ and ‘Export’ buttons at the top of the customers' list.

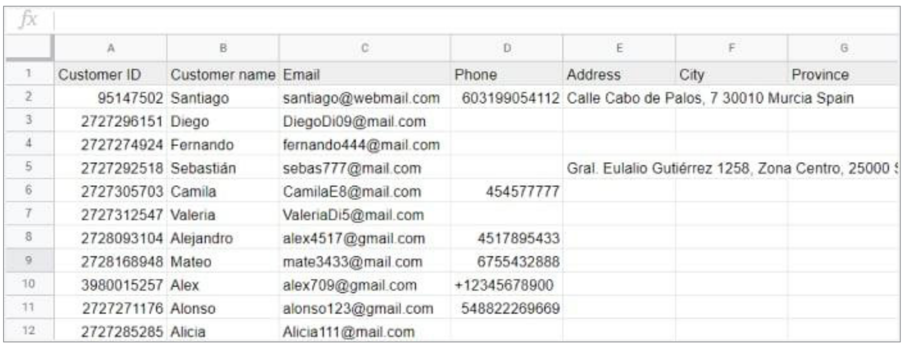
2



Click on the ‘Export’ button to download all of your contacts. Confirm the download dialog, and save the file to your computer.

Now you can open your file, edit the customer list, and import it back to the system.

3

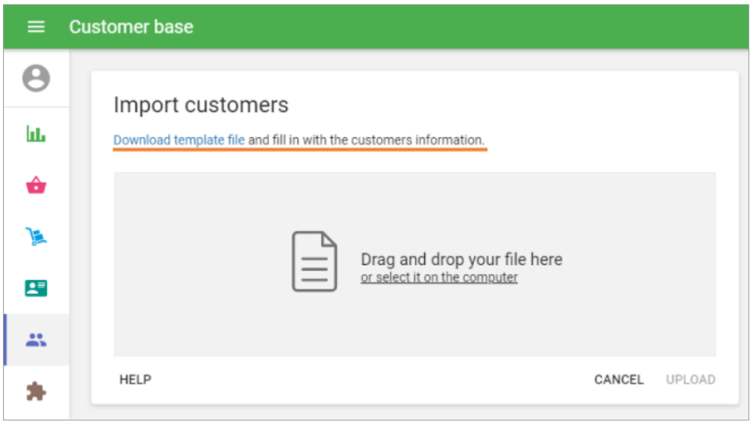


	A	B	C	D	E	F	G
1	Customer ID	Customer name	Email	Phone	Address	City	Province
2	95147502	Santiago	santiago@webmail.com	603199054112	Calle Cabo de Palos, 7 30010 Murcia Spain		
3	2727296151	Diego	DiegoDi09@mail.com				
4	2727274924	Fernando	fernando444@mail.com				
5	2727292518	Sebastián	sebas777@mail.com		Gral. Eulalio Gutiérrez 1258, Zona Centro, 25000		
6	2727305703	Camila	CamilaE8@mail.com	454577777			
7	2727312547	Valeria	ValeriaDi5@mail.com				
8	2728093104	Alejandro	alex4517@gmail.com	4517895433			
9	2728168948	Mateo	mate3433@mail.com	6755432888			
10	3980015257	Alex	alex709@gmail.com	+12345678900			
11	2727271176	Alonso	alonso123@gmail.com	548822269669			
12	2727285285	Alicia	Alicia111@mail.com				

During the editing process, remember that the main identifier of your client is by their email address. There should not be different clients with the same email address.

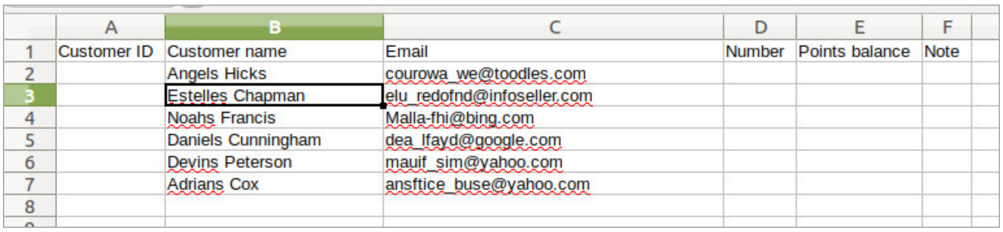
If you want to import the list of new customers, go to 'Import' and click the link, 'Download template file'.

4



Open your template file and fill up new customer information in the specified columns. If you are missing some information, you may leave the cell blank. Do not delete the column names from the first row or change their place.

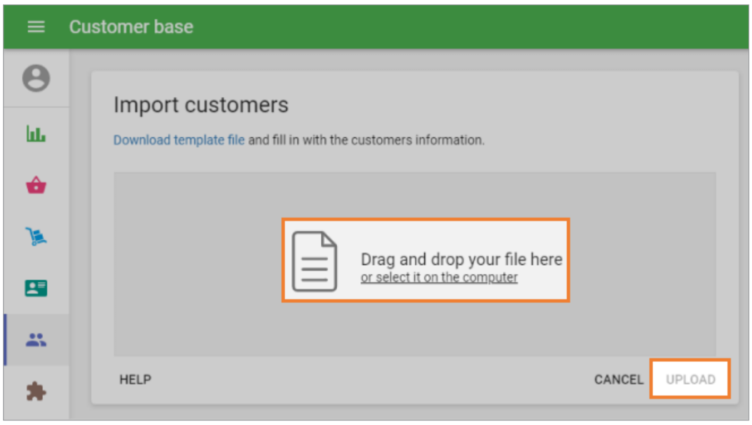
5



	A	B	C	D	E	F
1	Customer ID	Customer name	Email	Number	Points balance	Note
2		Angels Hicks	courowa_we@toodles.com			
3		Estelles Chapman	elu_redofnd@infoseller.com			
4		Noahs Francis	Malla-fhi@bing.com			
5		Daniels Cunningham	dea_lfayd@google.com			
6		Devins Peterson	mauif_sim@yahoo.com			
7		Adrians Cox	ansftice_buse@yahoo.com			
8						

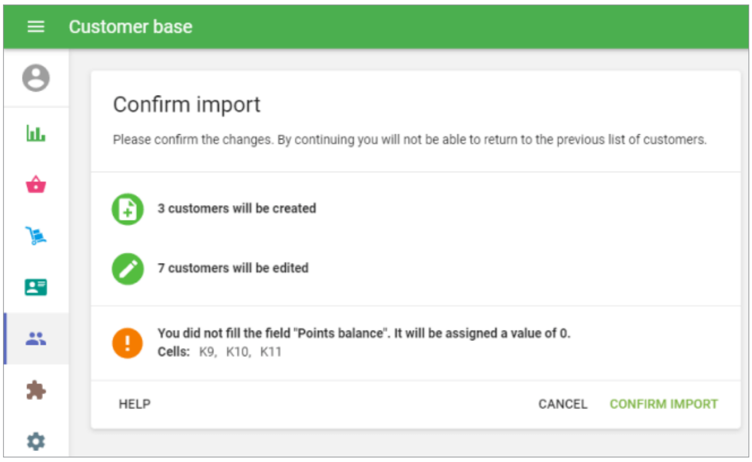
After the file of new customers has been made, you can save and import it at the 'Import customers' window by dragging and dropping it into the selected area or by selecting it on your computer through the link. The import will start after clicking on the 'Upload' button.

6



Then, the confirmation window will appear with a short report and warning signs.

7



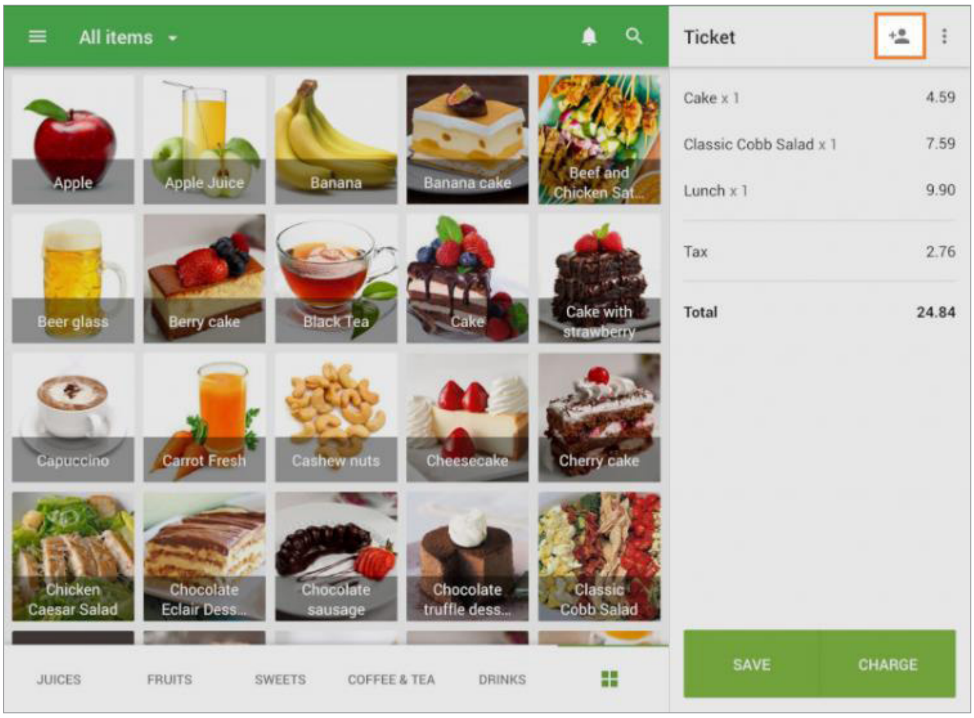
After confirming, the customer base will be renewed with the added customers or any changes to existing ones.

6.10 How to Add the Customer to the Receipt by Scanning a Barcode

The cashier can add the customer to the receipt by scanning the barcode from his/her loyalty card with a barcode scanner or device camera. However, before doing that, the barcode from the customer's loyalty card ("customer code") should be entered into the customer's profile.

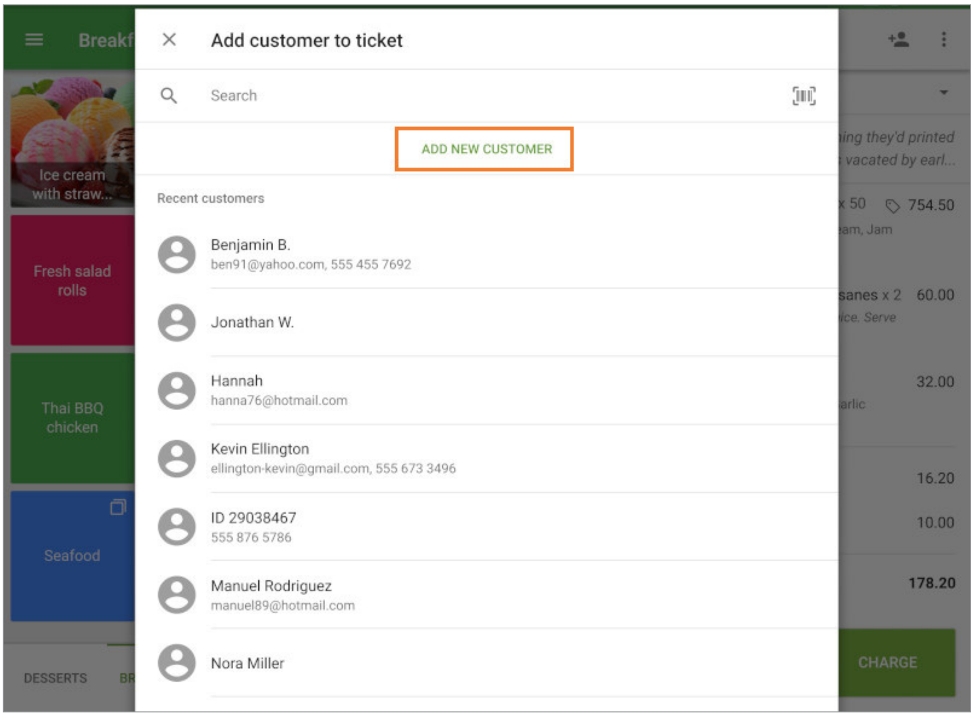
When you register a new customer at the POS, you can add a customer code by clicking the 'Add client' icon at the top right-hand corner of the sale screen.

1



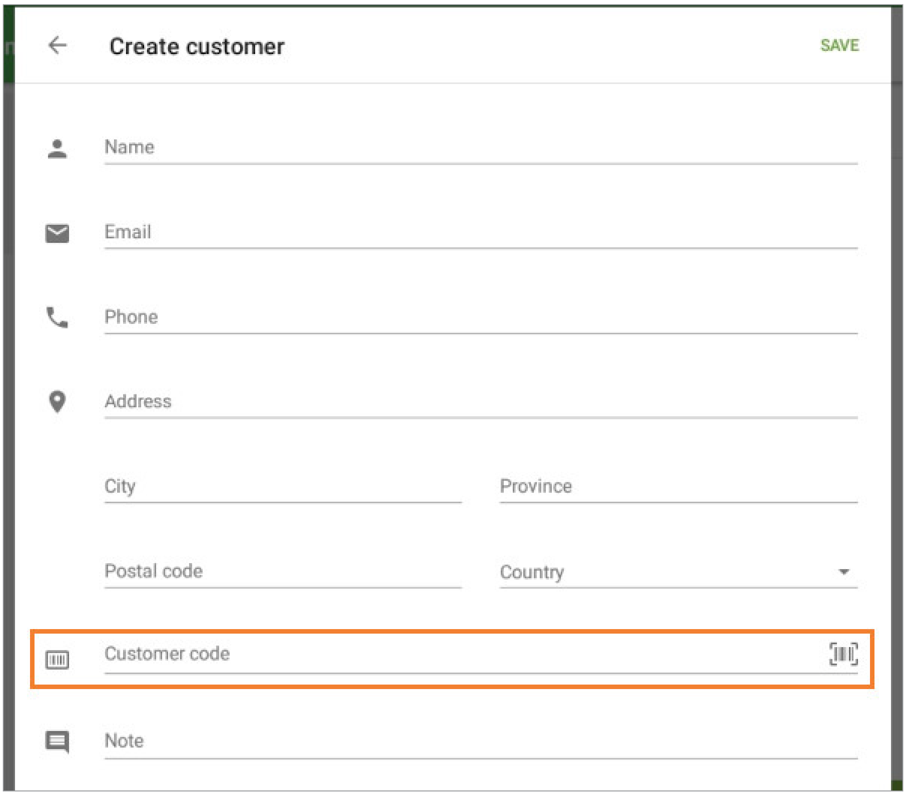
Tap on 'Add new customer.'

2



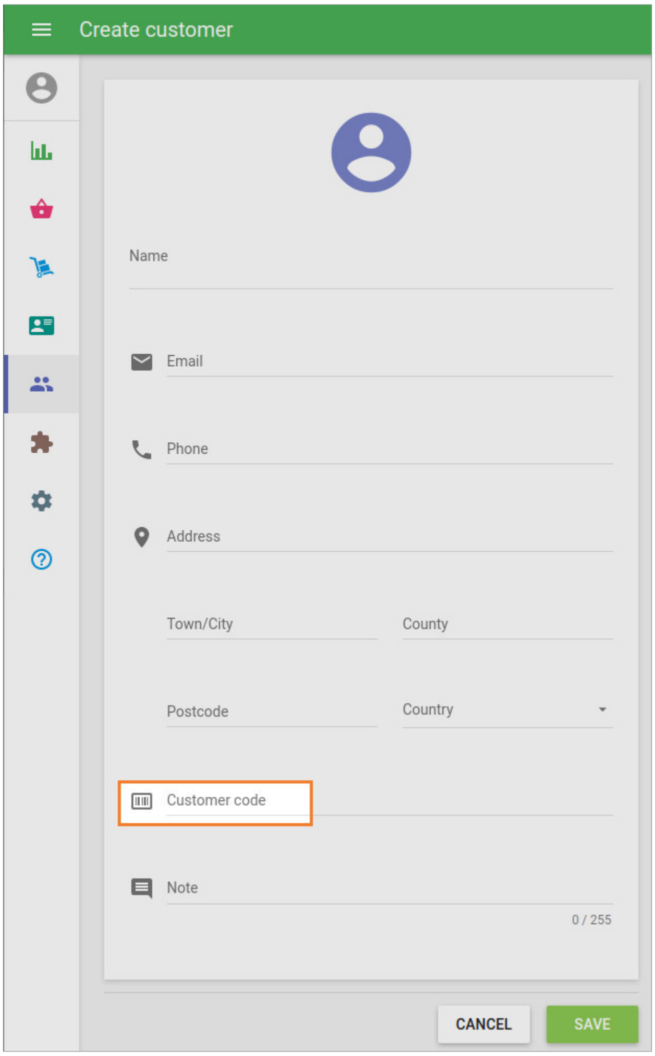
Fill in the 'Customer code' field by entering the barcode numbers with the keypad or using a barcode scanner or device camera ("Use camera to scan barcodes" function should be on). Tap' Save.'

3



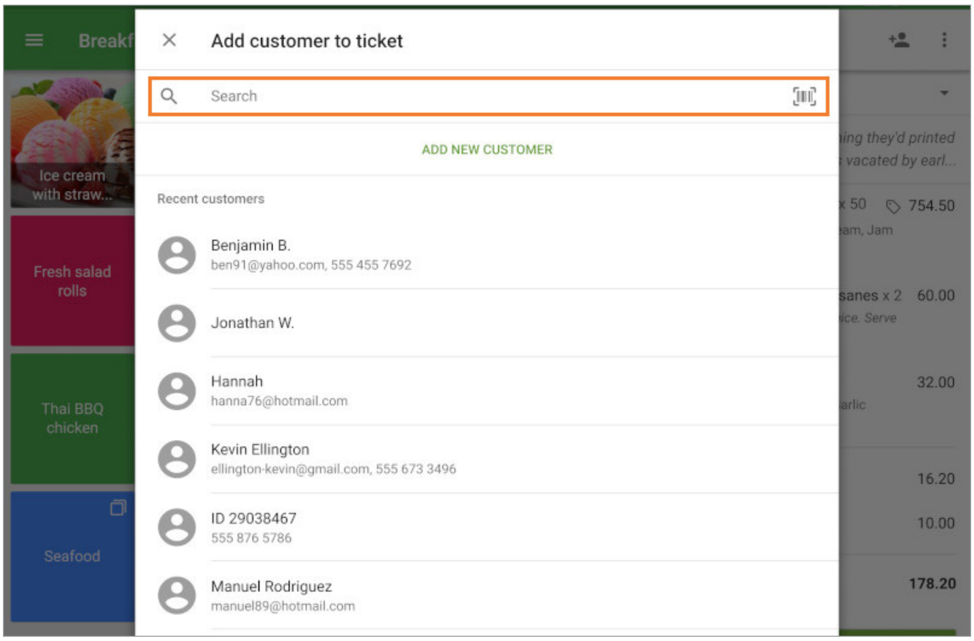
You can also add the customer code at the customer profile in the Back Office.

4



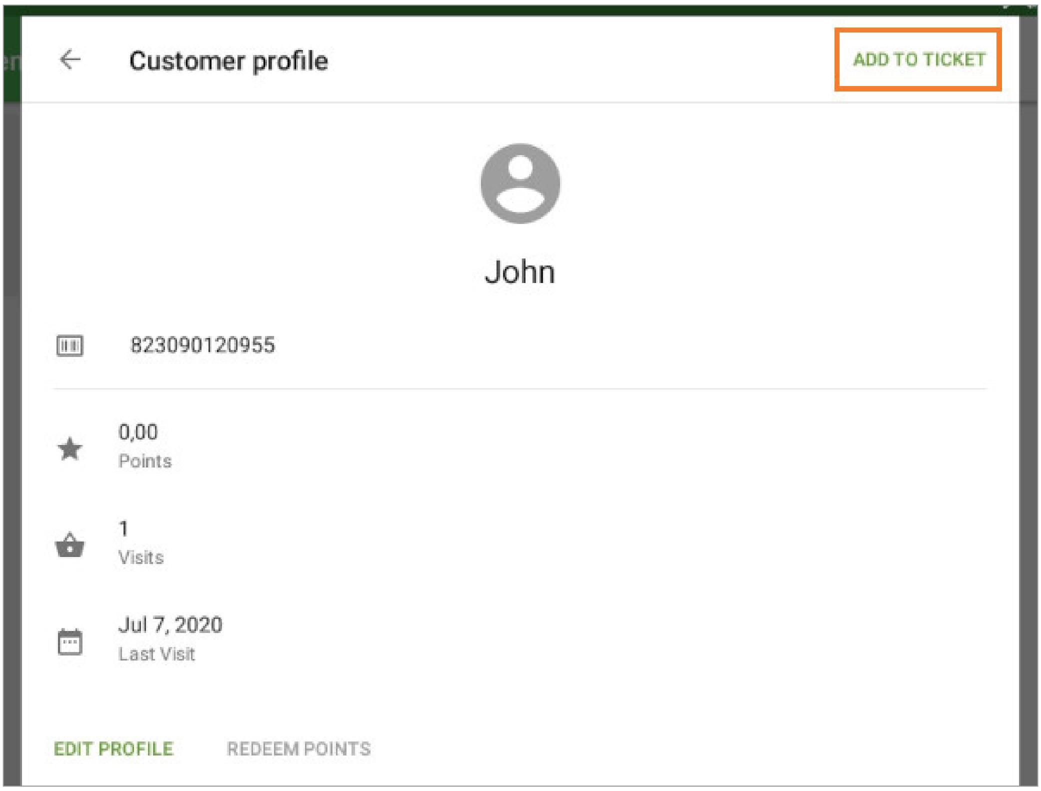
When the codes are in the customers' profiles, you can search for registered customers by their customer code during the sale. You can use the search field or scan the barcode with a scanner or a built-in camera.

5



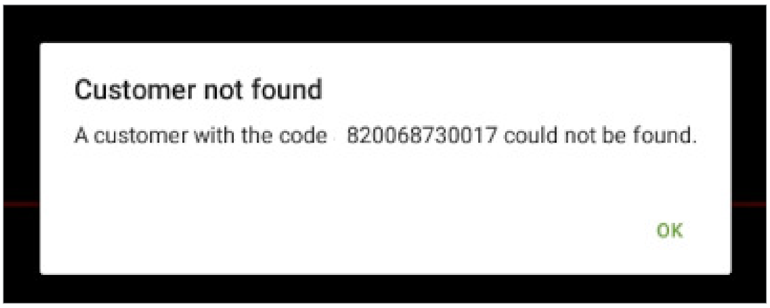
If the scanned value matches a customer code, the system opens the profile of this client. Tap the 'Add to ticket' button.

6



If the scanned value does not match any of the customer code, you will see the following message:

7



Note

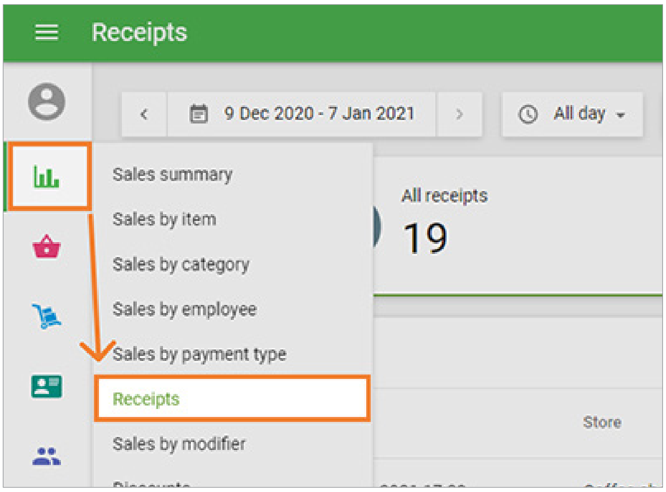
You can also search for receipts using the customer code in the "Receipts" menu at the POS to view all the customer's receipts.

6.11 How to See the Purchase History of Registered Customers at the Back Office

After you have set up the customer loyalty program which connects sale records to customers, you may also want to see the purchase history of your regular customers. You can access information about customer purchases through the 'Receipts' report.

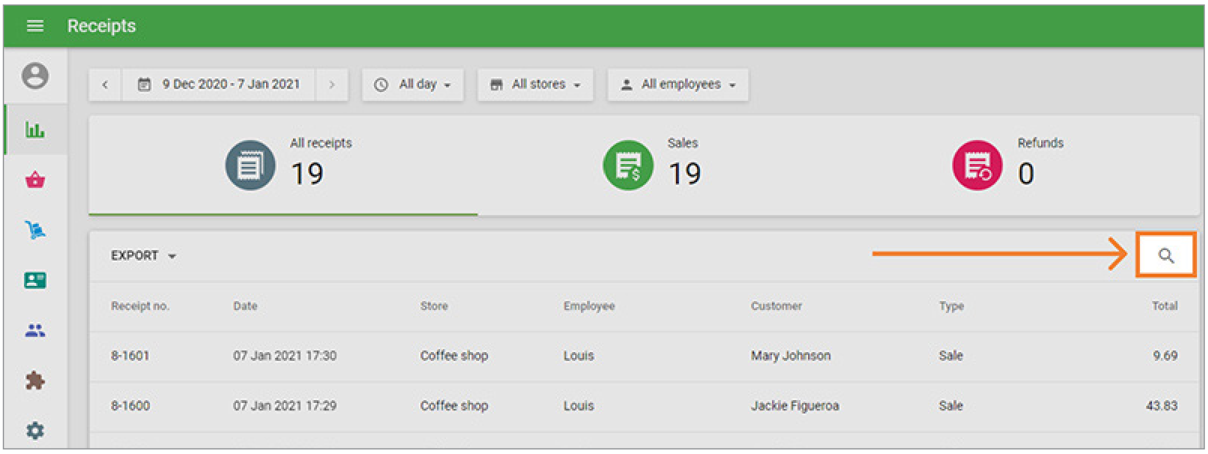
In the Back Office, go to the 'Receipts' section.

1



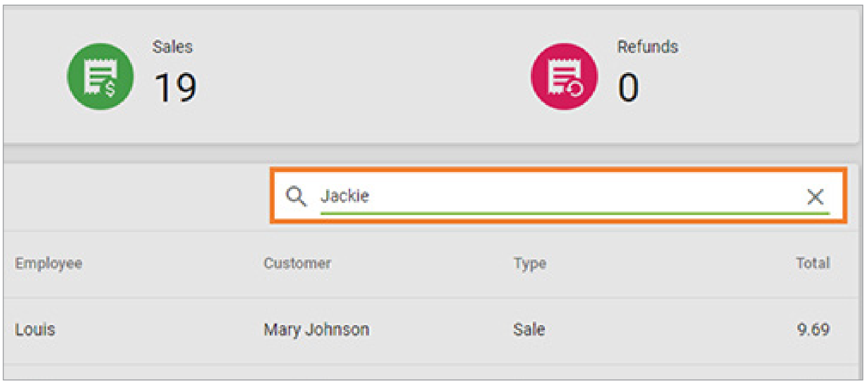
Click on the search icon.

2



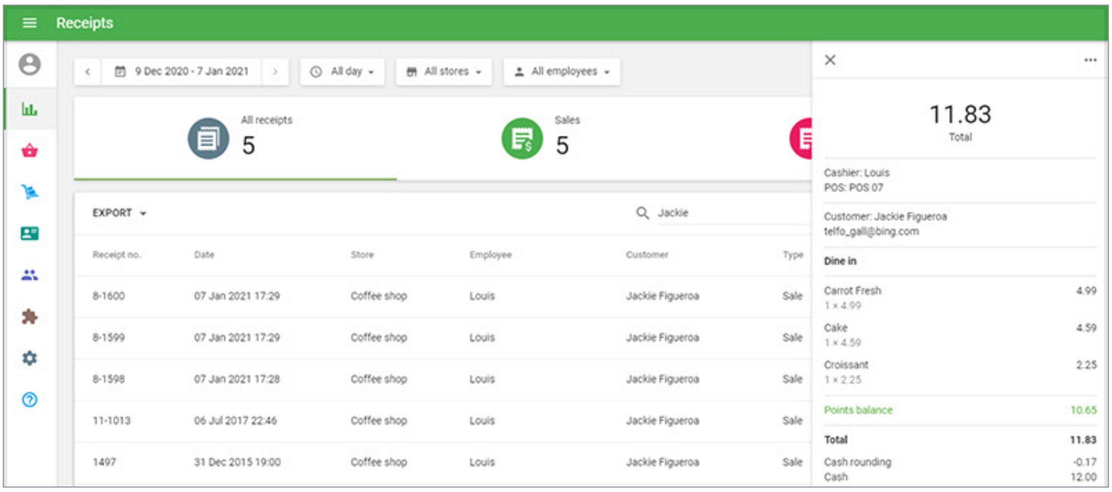
Tap your customer name and click <Enter> on the keyboard.

3



You will see the list of receipts which are connected to the customer.

4

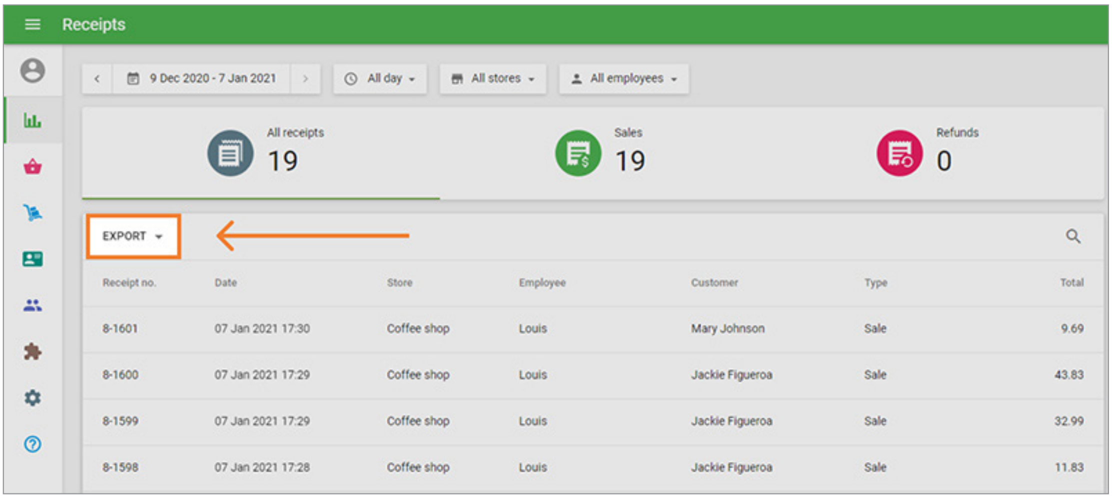


If you click on a receipt row, the details will appear on the right side of the screen.

The other way to see the information about the customer is in the exported 'Receipts' report file. After exporting the report and opening it as a sheet, you can filter the customers.

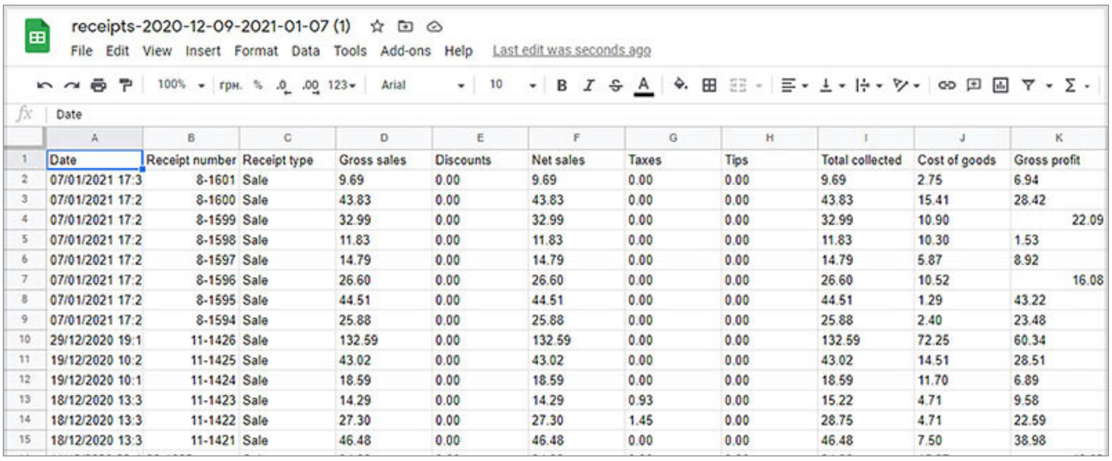
Choose the desired period for the report. Export it as a CSV file by clicking on the 'Export' button.

5



[Open the file in Google Sheets.]

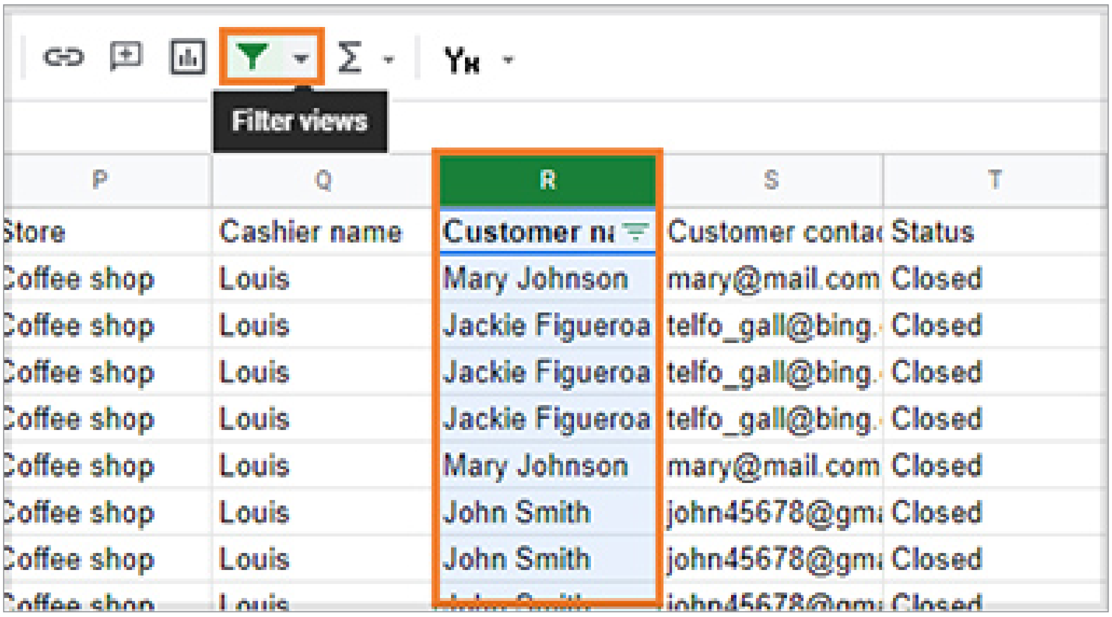
6



	A	B	C	D	E	F	G	H	I	J	K
1	Date	Receipt number	Receipt type	Gross sales	Discounts	Net sales	Taxes	Tips	Total collected	Cost of goods	Gross profit
2	07/01/2021 17:3	8-1601	Sale	9.69	0.00	9.69	0.00	0.00	9.69	2.75	6.94
3	07/01/2021 17:2	8-1600	Sale	43.83	0.00	43.83	0.00	0.00	43.83	15.41	28.42
4	07/01/2021 17:2	8-1599	Sale	32.99	0.00	32.99	0.00	0.00	32.99	10.90	22.09
5	07/01/2021 17:2	8-1598	Sale	11.83	0.00	11.83	0.00	0.00	11.83	10.30	1.53
6	07/01/2021 17:2	8-1597	Sale	14.79	0.00	14.79	0.00	0.00	14.79	5.87	8.92
7	07/01/2021 17:2	8-1596	Sale	26.60	0.00	26.60	0.00	0.00	26.60	10.52	16.08
8	07/01/2021 17:2	8-1595	Sale	44.51	0.00	44.51	0.00	0.00	44.51	1.29	43.22
9	07/01/2021 17:2	8-1594	Sale	25.88	0.00	25.88	0.00	0.00	25.88	2.40	23.48
10	29/12/2020 19:1	11-1426	Sale	132.59	0.00	132.59	0.00	0.00	132.59	72.25	60.34
11	19/12/2020 10:2	11-1425	Sale	43.02	0.00	43.02	0.00	0.00	43.02	14.51	28.51
12	19/12/2020 10:1	11-1424	Sale	18.59	0.00	18.59	0.00	0.00	18.59	11.70	6.89
13	18/12/2020 13:3	11-1423	Sale	14.29	0.00	14.29	0.93	0.00	15.22	4.71	9.58
14	18/12/2020 13:3	11-1422	Sale	27.30	0.00	27.30	1.45	0.00	28.75	4.71	22.59
15	18/12/2020 13:3	11-1421	Sale	46.48	0.00	46.48	0.00	0.00	46.48	7.50	38.98

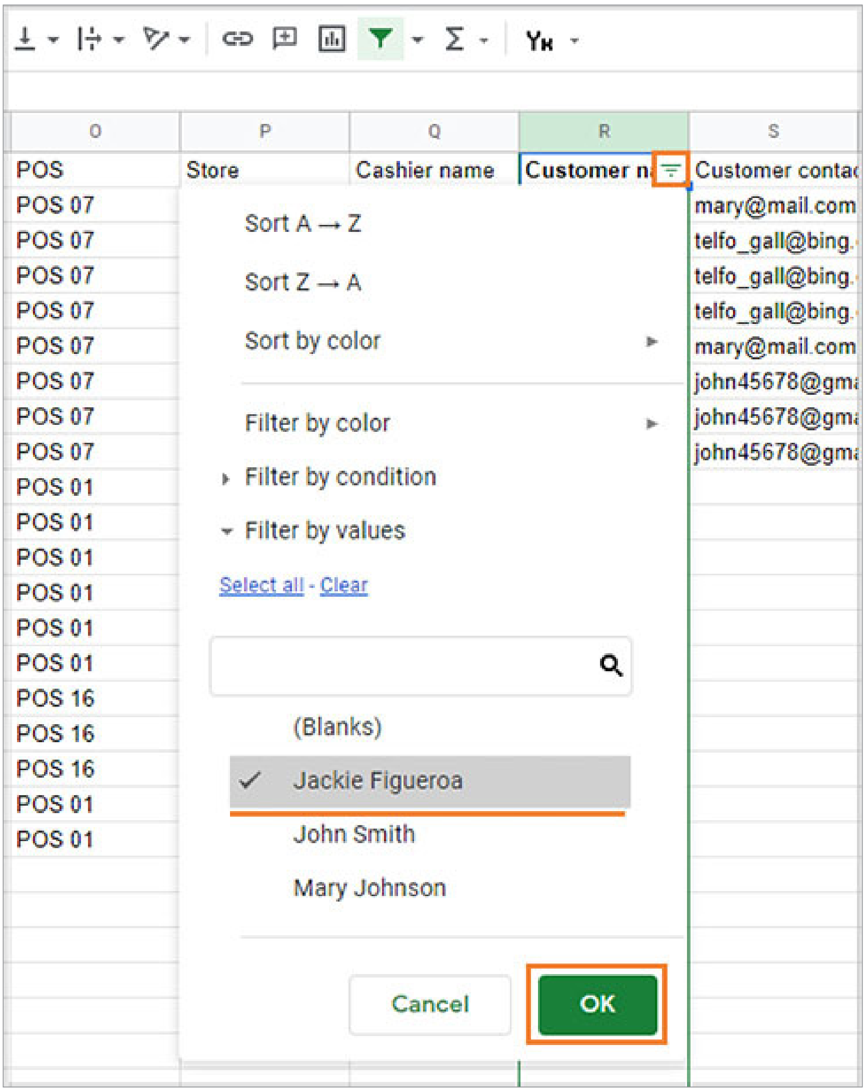
Find and select the column ‘Customer name’ and apply a filter to it.

7



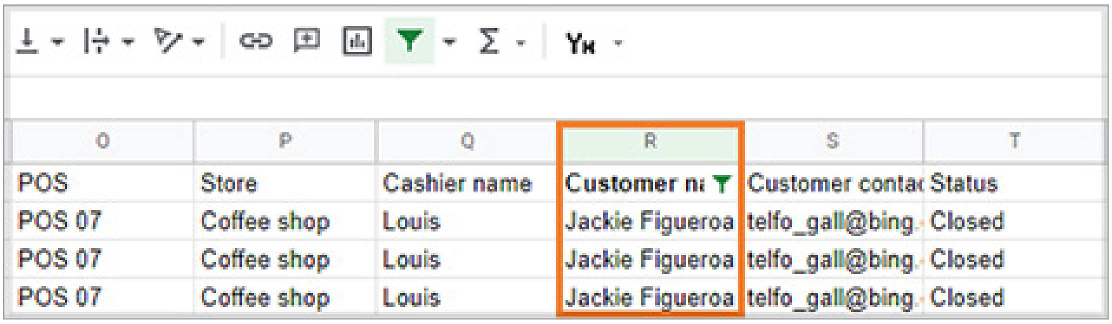
Then, click on the filter icon in the column name and select only the desired customer from the list and apply the filter by clicking the ‘OK’ button.

8



When the filter is applied, you can see purchases made by that specified customer.

9

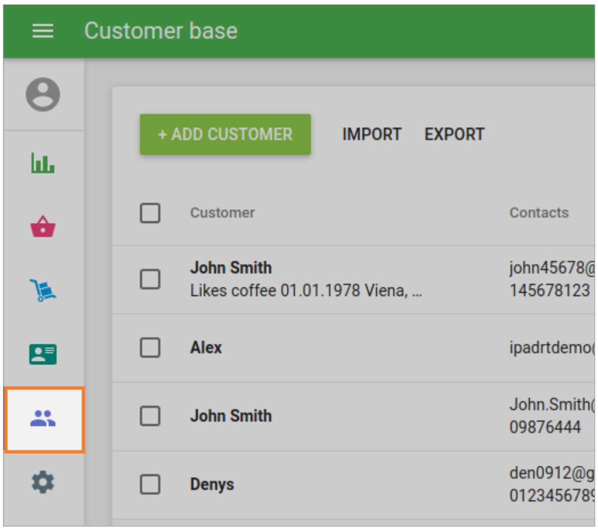


O	P	Q	R	S	T
POS	Store	Cashier name	Customer n	Customer contac	Status
POS 07	Coffee shop	Louis	Jackie Figueroa	telfo_gall@bing.	Closed
POS 07	Coffee shop	Louis	Jackie Figueroa	telfo_gall@bing.	Closed
POS 07	Coffee shop	Louis	Jackie Figueroa	telfo_gall@bing.	Closed

6.12 How to Delete Customers from the Base

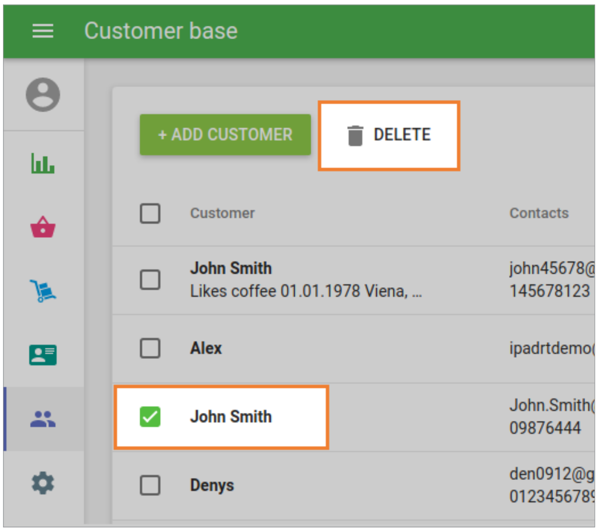
You can delete customers only at the Back Office; not in the Loyverse POS App.
Enter the Back Office and open your 'Customer base'.

1



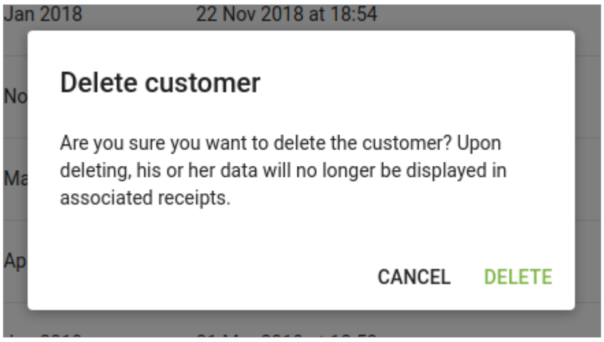
Select the customers you want to delete from the customer list, and click the ‘Delete’ button.

2



Confirm deletion in the open window.

3



6.13 Customer Display System Configuration Guide

This guide will show you how to configure Loyverse CDS. To learn more about working with Customer Display System, please read [How Loyverse CDS Customer Display works](#).

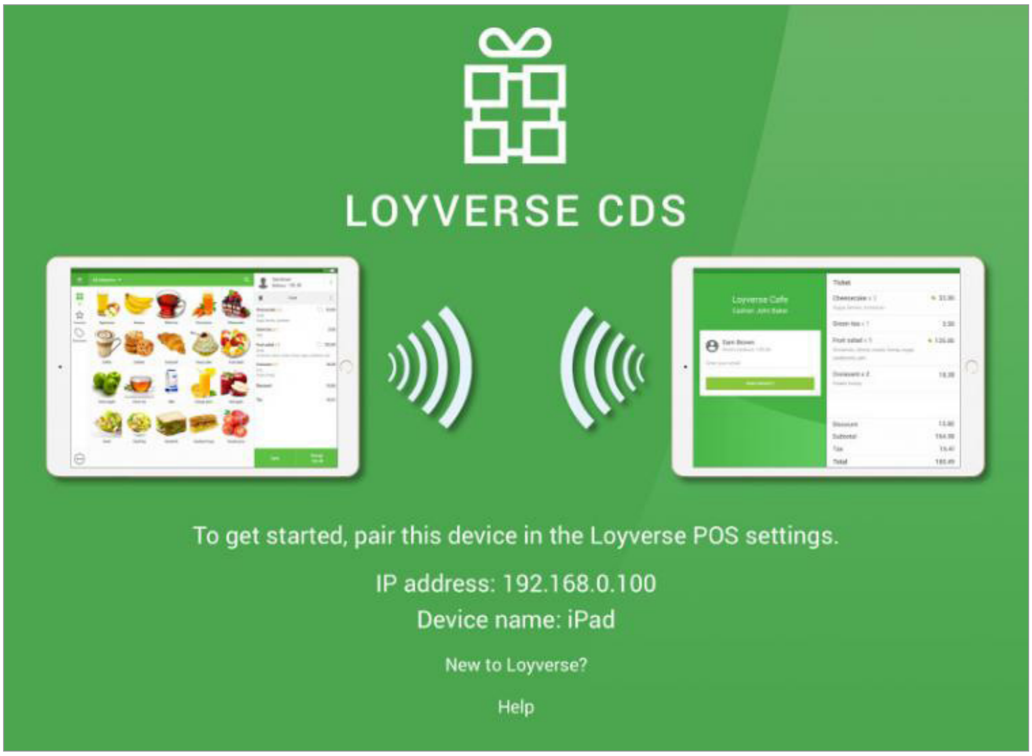
The Loyverse CDS app lets you display itemized order information to your customers on a separate digital display without interrupting the payment flow in the Loyverse POS app.

6.13.1 Install Loyverse CDS app

Download the Loyverse CDS for iOS devices, the **recommended version of iOS is 11.0 or higher** and for **Android devices is 5.0 version or higher**. Loyverse CDS app should be installed on a separate device from the one with the Loyverse POS app.

Launch the app, and you will see the Loyverse CDS welcome screen. The ‘IP Address’ and ‘Device name’ of your device will be displayed, which are the information needed for paring CDS with Loyverse POS.

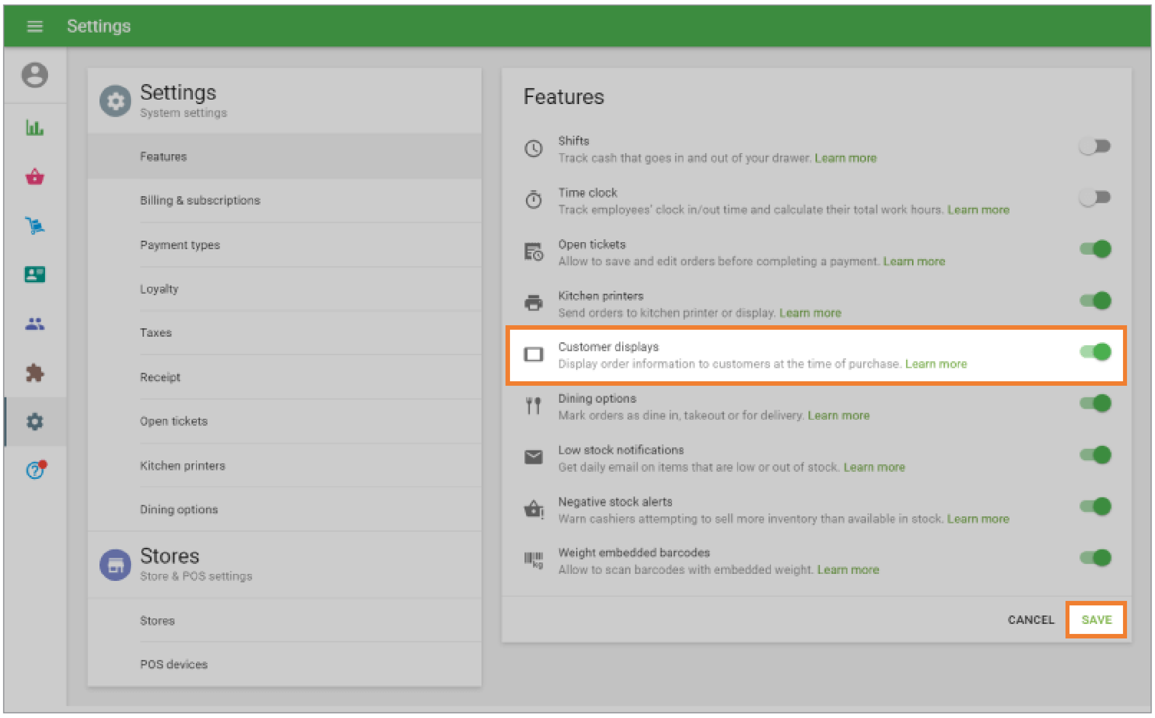
1



6.13.2 Activate option for using CDS

Login to the Back Office, navigate to the Settings menu, Features section, and switch the 'Customer displays' slider on.

1



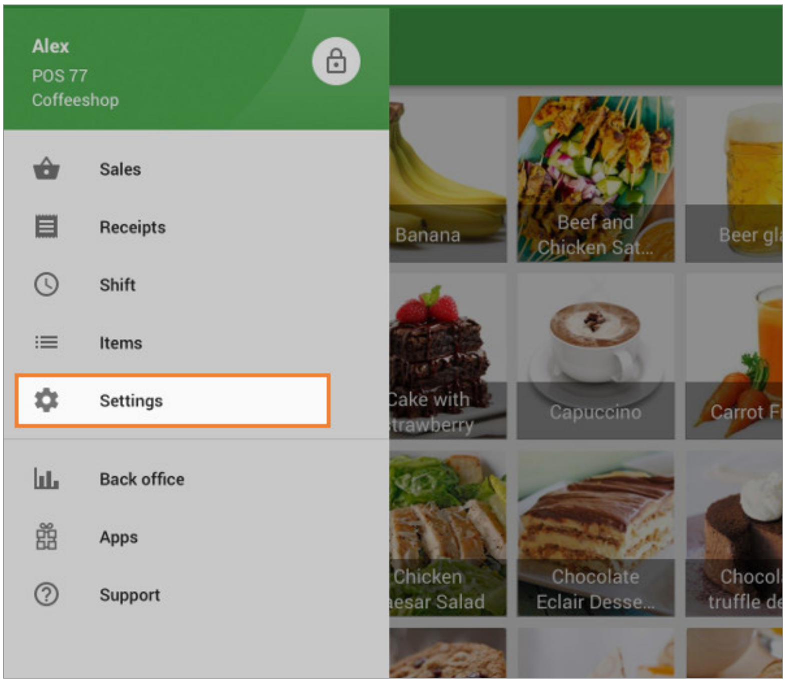
Don't forget to save changes.

6.13.3 Pair customer display with Loyverse POS

First, make sure that the mobile devices with Loyverse CDS and Loyverse POS are connected to the same Wi-Fi router and the same network.

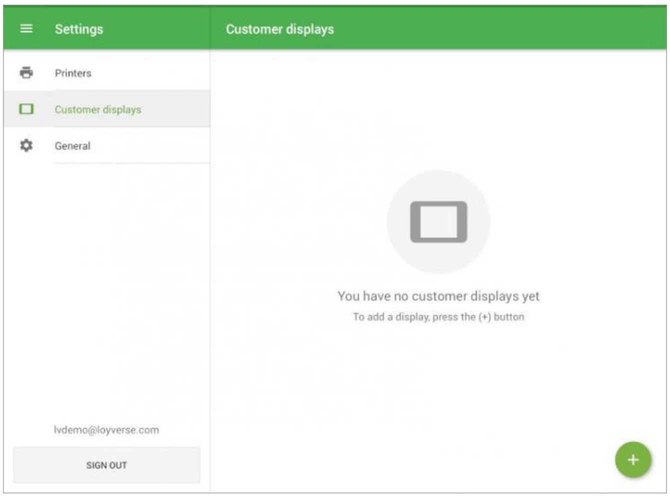
Then launch Loyverse POS and go to Settings > Customer displays.

1



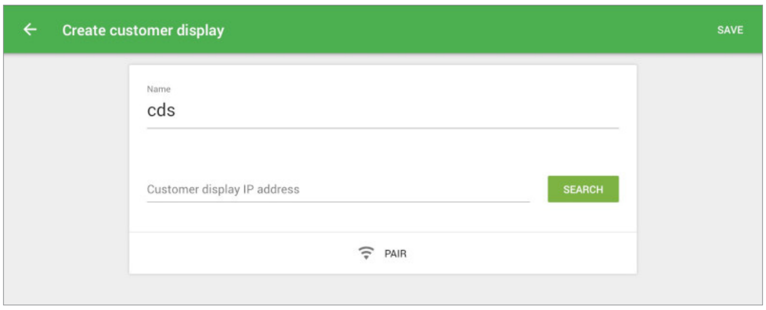
Tap the '+' button to add a customer display.

2



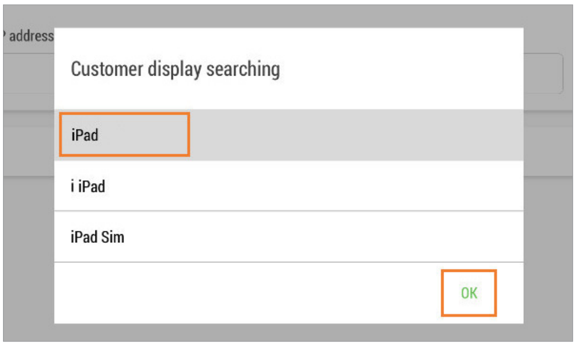
Enter your customer display name into the 'Name' field and tap the 'Search' button to search the network for available customer display device.

3



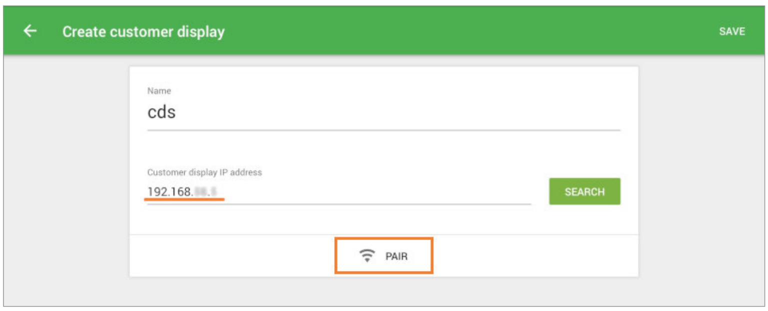
Select the appropriate customer display from the list of discovered devices, and click OK.

4



If automatic discovery fails, you can enter the IP address of the customer display device manually. You can take the information about the IP address from the Loyverse CDS welcome screen.

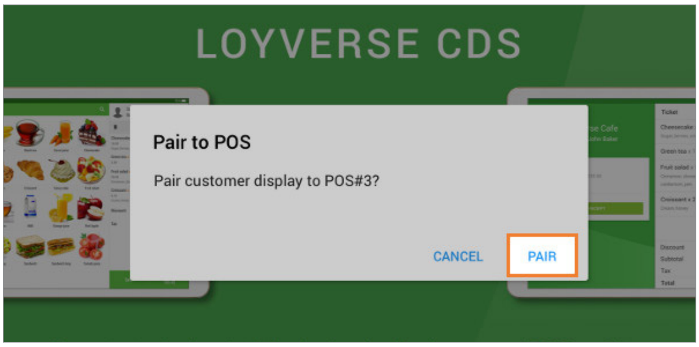
5



Then tap the 'Pair' button.

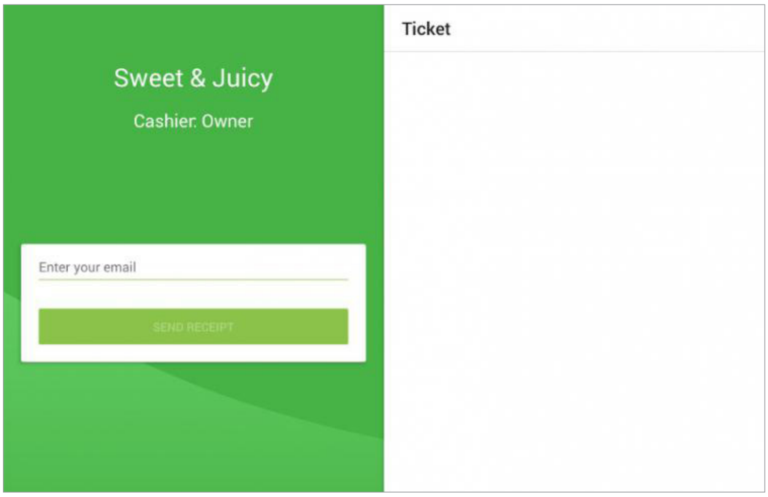
On the Loyverse CDS tablet, the invitation to pair CDS to POS will appear. Tap 'Pair' to confirm the connection.

6



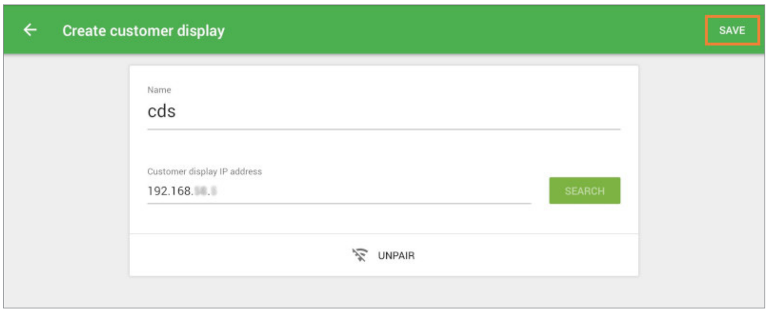
If you see a screen with a blank ticket, then your customer display is paired with Loyverse POS.

7



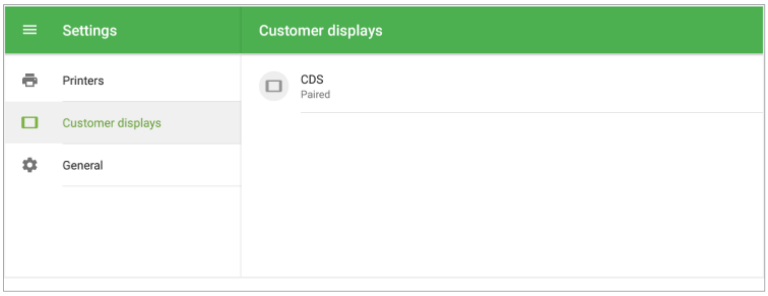
At the Loyverse POS, the button 'Pair' will change to 'Unpair'. Save your settings at Loyverse POS.

8



Now you can see your paired Customer Display on the list.

9



In the same way, you can connect several CDS to the same POS

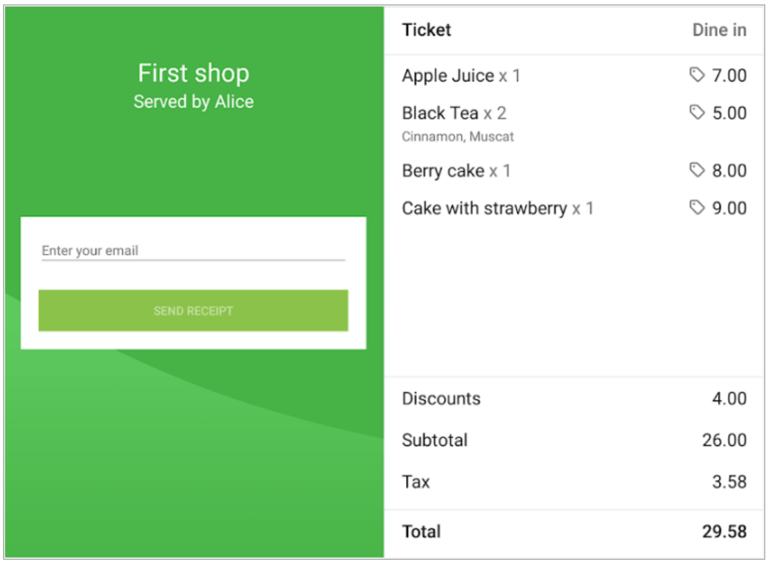
6.14 How Loyverse CDS Customer Display Works

Please refer to the Loyverse CDS setup guide and make sure you Loyverse CDS app is configured correctly.

Now that you have Loyverse CDS setup, it will display order information from the ticket during sales.

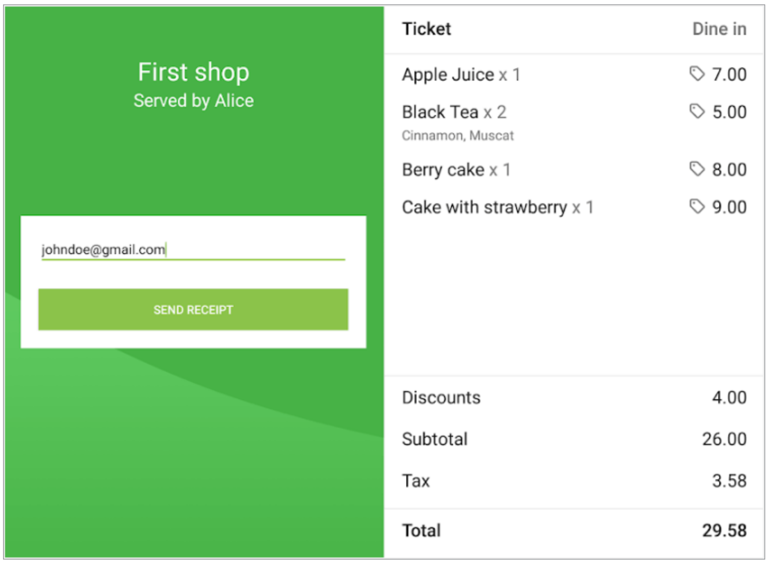
At the right side of the screen, there is the ticket with the list of items. CDS will display modifiers, discounts, taxes applied to items as well as to full ticket.

1



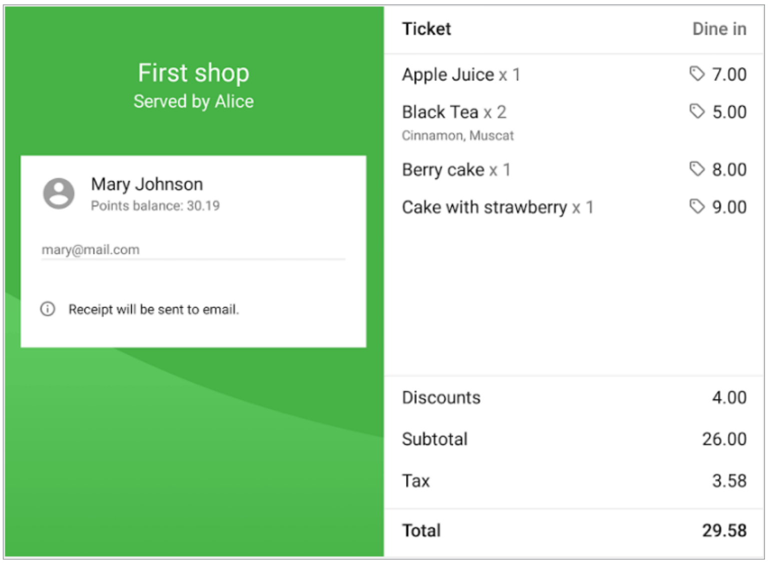
At the left side of the screen the store and cashier names displayed and field that customer can fill in E-mail to receive e-receipt.

2



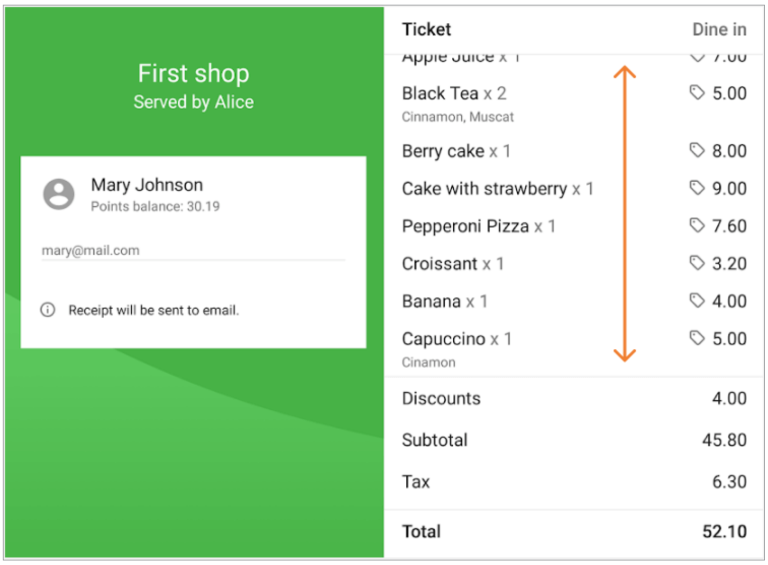
If you have assigned a customer to a ticket, the CDS displays this customer name, bonus points balance and Email.

3



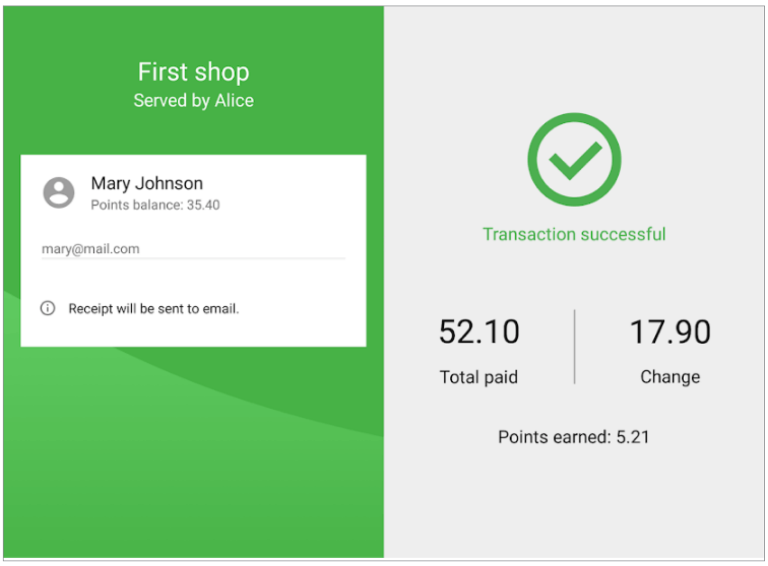
If the ticket is too long, a customer can use a vertical scroll to look through all items.

4



After a customer has been charged, customer screen displays total value of payment and change.

5

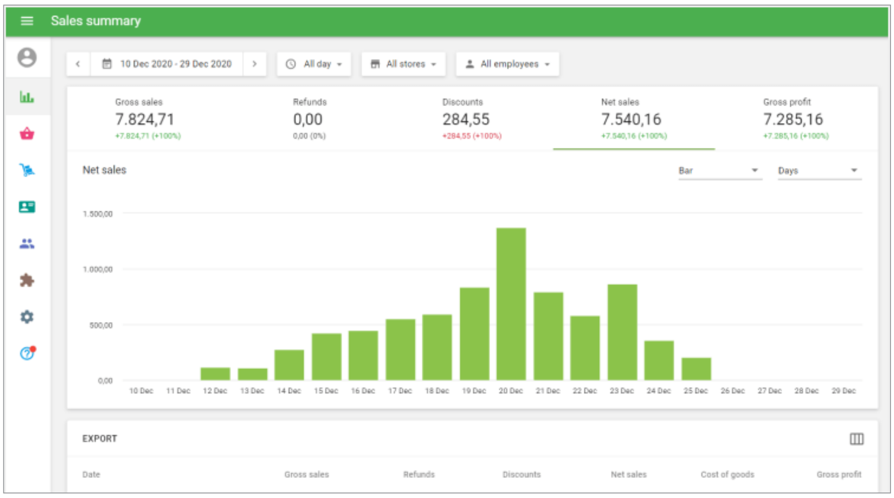


7. Reports

7.1 Sales Summary Report in the Back Office

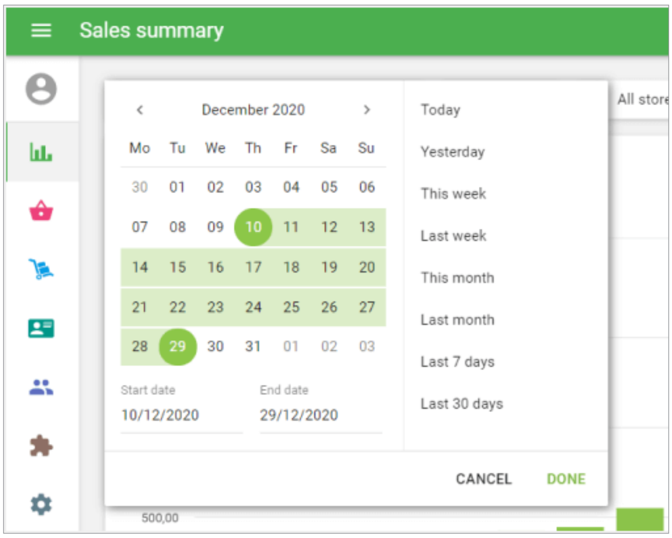
When you enter the Back Office, you will see all of the most important information about your sales in the "Sales Summary" section.

1



At the top, you can set the period for the report: today, yesterday, this week, this month or custom. If you have several stores, you can select some of them for the report. The same for employees.

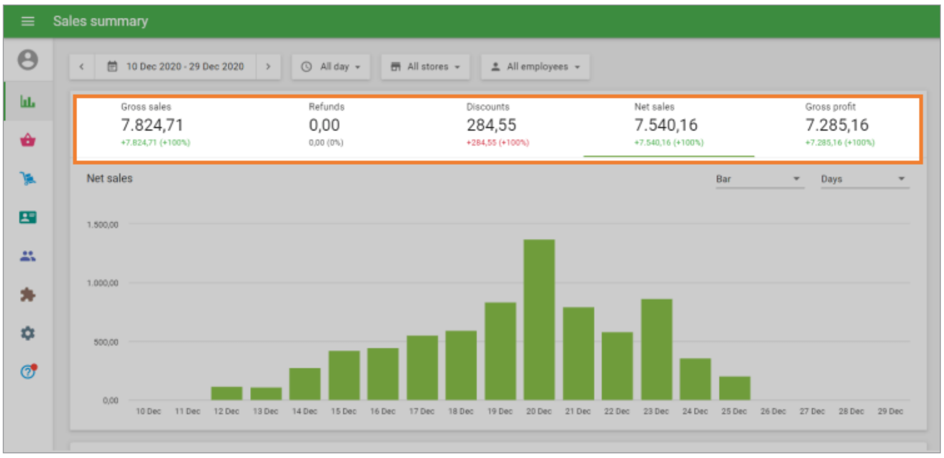
2



There is a set of tabs with the values of main sales parameters: Gross sales, Refunds, Discounts, Net sales, Gross profit. Below each values, you can see how much more or less you made compared to the previous period in the same span of time.

If you click on any of these tabs, you will see the chart of the selected parameter for the period.

3



Gross sales is the total revenue, calculated as the sum of all sales prior to adding any discounts, tips, and taxes. However, if the tax is already included in the price of the goods, that price is used to calculate the gross sales.

Note: Taxes that are added to the price will not be taken into account for Gross sales. Taxes that are included in the item price will be taken into account for Gross sales. Cost of the modifiers is counted in Gross sales. Discounts are not taken into account for Gross sales.

Refunds is the amount of money returned to the customers, calculated as the sum of the returned items' prices prior to adding any discounts, tips, and taxes. However, if the tax is already included in the price of the goods, that price is used to calculate refunds.

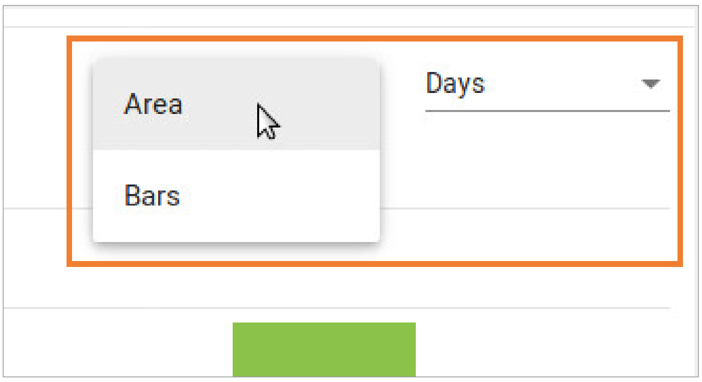
Discounts is the amount of all discounts applied to the items, calculated as the difference between the sum of discounts on sales receipts and the sum of discounts on the return receipts.

Net sales is the total revenue minus the cost of discounts and sales returns.
Net Sales = Gross Sales — Discounts — Refunds

Gross profit — Net sales minus Cost of goods of the item for the selected period
Gross profit = Net sales — Cost of goods

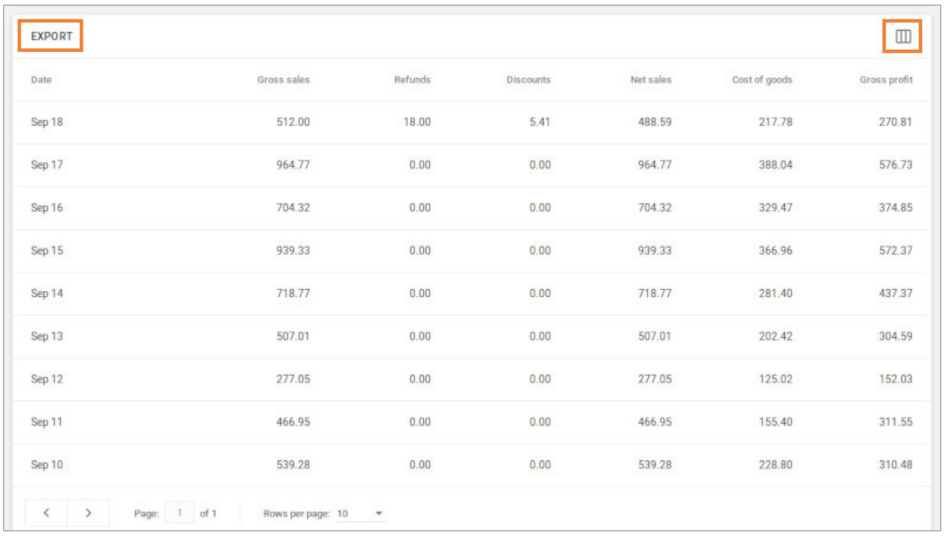
On the diagram of the sales parameters, you can choose to see the data either as an Area or Bars, and also group it hourly, daily, weekly, monthly, quarterly, or yearly.

4



At the bottom, you can see a table with the value of sales summary information for each day. You can export the Sales Summary report by clicking on the 'Export' button.

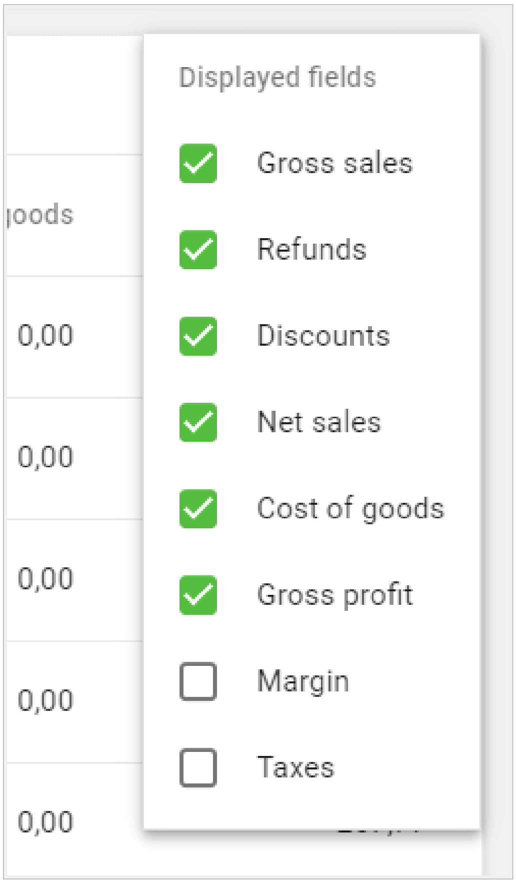
5



Date	Gross sales	Refunds	Discounts	Net sales	Cost of goods	Gross profit
Sep 18	512.00	18.00	5.41	488.59	217.78	270.81
Sep 17	964.77	0.00	0.00	964.77	388.04	576.73
Sep 16	704.32	0.00	0.00	704.32	329.47	374.85
Sep 15	939.33	0.00	0.00	939.33	366.96	572.37
Sep 14	718.77	0.00	0.00	718.77	281.40	437.37
Sep 13	507.01	0.00	0.00	507.01	202.42	304.59
Sep 12	277.05	0.00	0.00	277.05	125.02	152.03
Sep 11	466.95	0.00	0.00	466.95	155.40	311.55
Sep 10	539.28	0.00	0.00	539.28	228.80	310.48

You can also set up and customize the displayed columns by clicking on the three vertical lines icon on the right-hand side of the header.

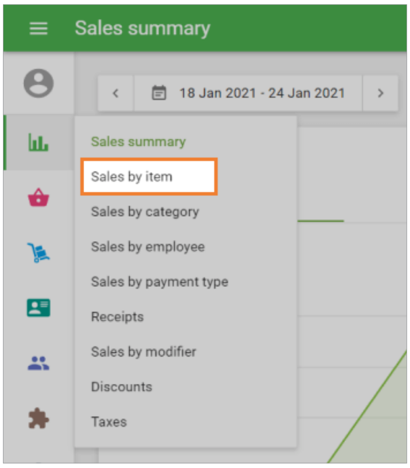
6



7.2 Sales by Item Report in the Back Office

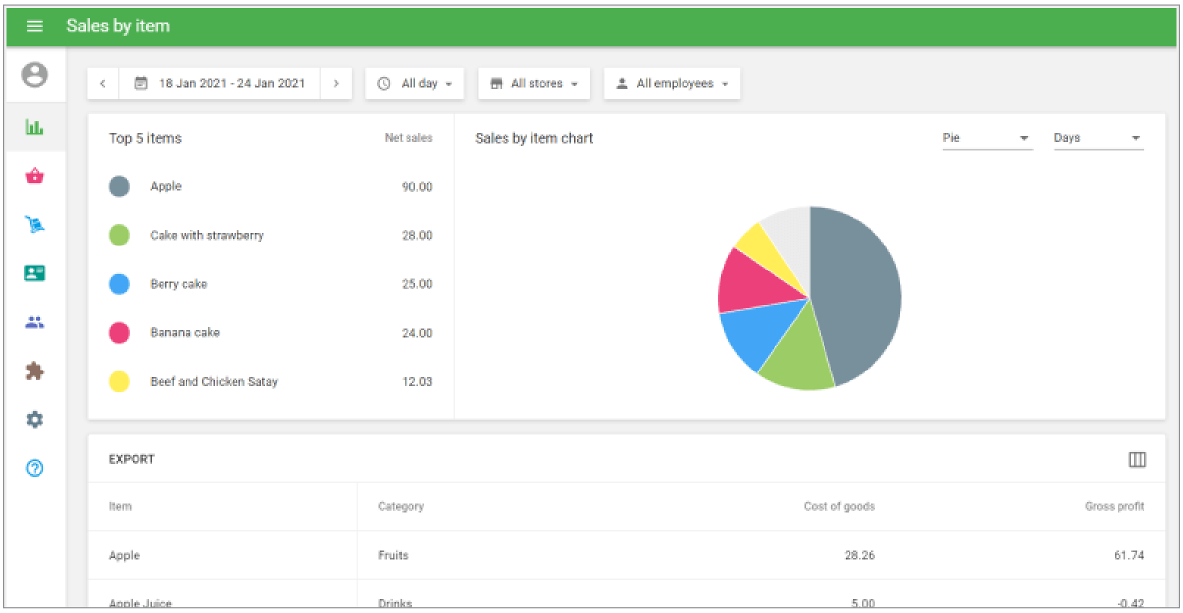
In the Back Office, go to the ‘Sales by item’ section.

1



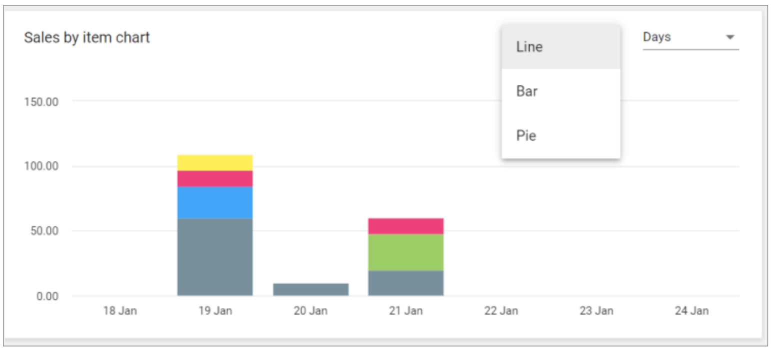
At the top, you can set the period for the report: today, yesterday, this week, this month or custom.
You will see information about your sales by items. The top 5 items will be displayed according to the ‘Net sales’ along with the total amount sold next to it.

2



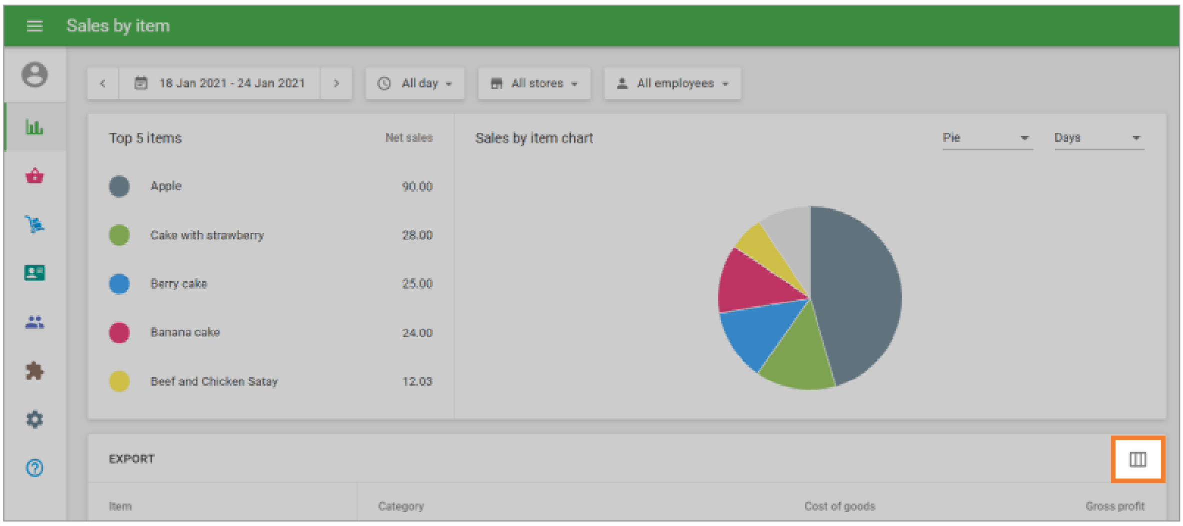
For the ‘Sales by item chart’ on the right side, you can choose to see the data either as a Bar, Line or Pie chart and also group it in Hours, Days, Weeks, Monthls, Quarters, or Years.

3

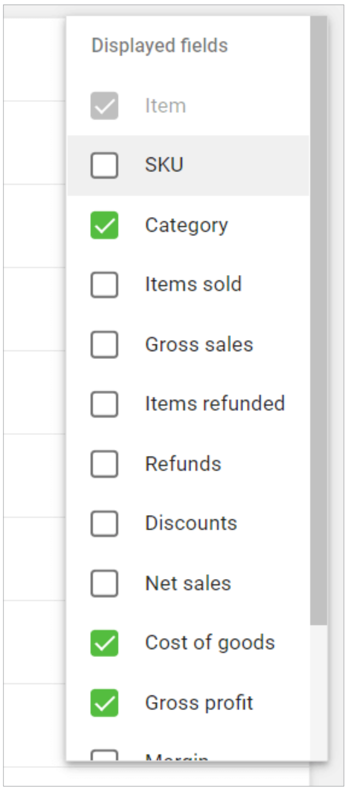


At the bottom, you can see a table with the value of parameters for each item.
You can also setup and customize the displayed columns by clicking on three vertical lines icon on the right-hand side of the header.

4



5



Parameter options include:

SKU — Stock Keeping Unit is a unique code given to each item. See details in How to Add Items in the Loyverse Back Office

Category — the category of the item

Items sold — the total number of the item that was sold during the selected period

Gross sales — the total revenue for the item for the selected period. See details in Sales Summary Report in the Back Office

Items refunded — the total number of the item that was refunded during the selected period

Refunds — the total amount refunded for the item during the selected period. See details in Sales Summary Report in the Back Office

Discounts — the amount of all discounts on the item for the selected period. See details in Sales Summary Report in the Back Office

Net sales — Gross sales minus the cost of discounts and sales returns for the selected period. See details in Sales Summary Report in the Back Office

$$NetSales = GrossSales - Discounts - Refunds$$

Cost of goods — the item cost

Gross profit — Net sales minus Cost of goods of the item for the selected period

$$GrossProfit = NetSales - CostOfGoods$$

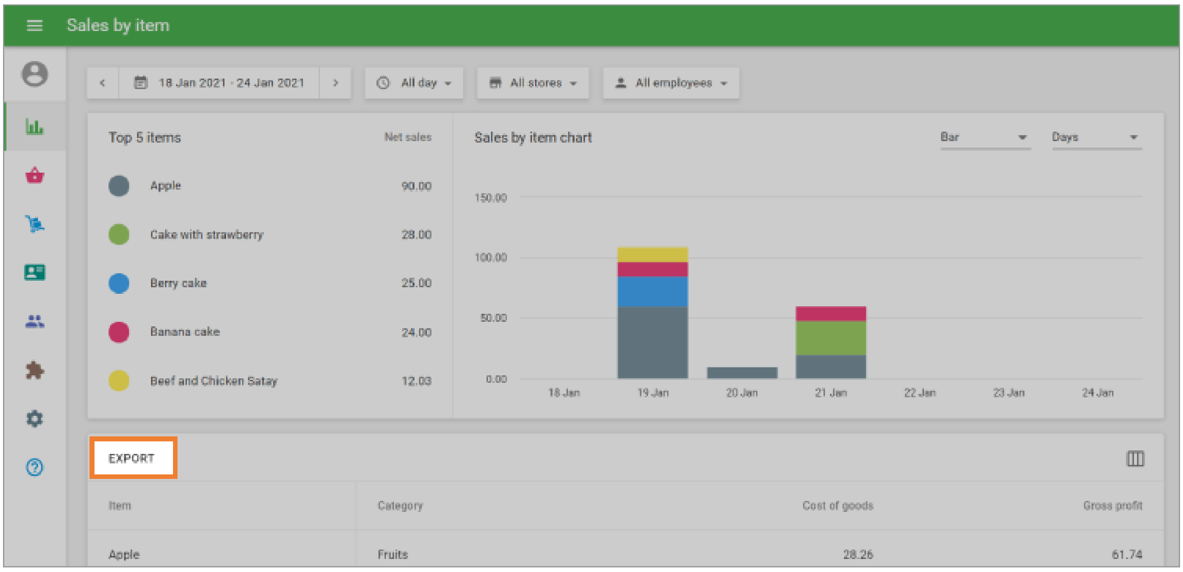
Margin — the item's margin for the selected period, calculated as the ratio of Gross profit to Net sales

$$Margin = \frac{GrossProfit}{NetSales} 100\%$$

Taxes — the amount of taxes applied to the item for the selected period

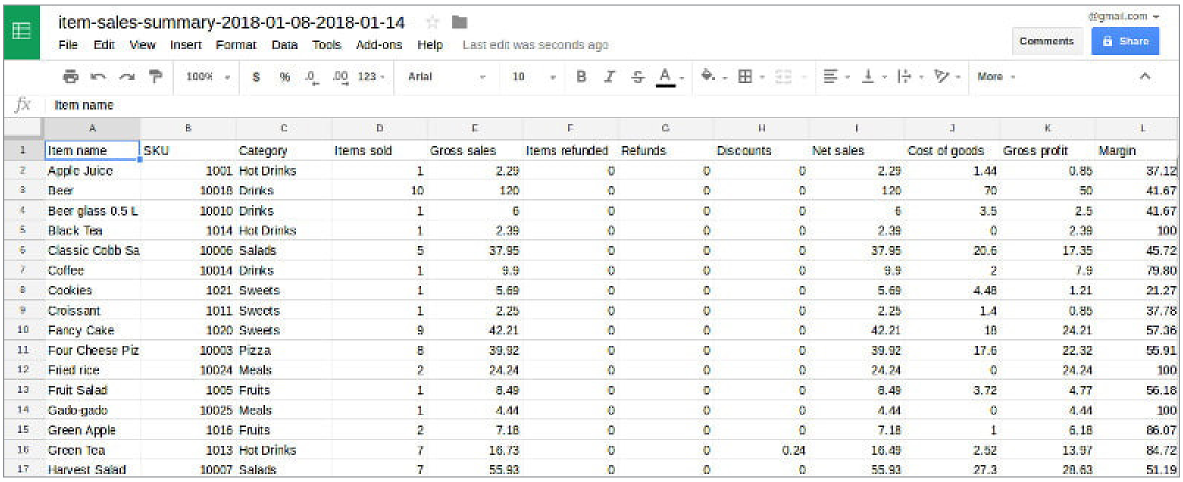
You can export Sales by Item Report for the desired period in CSV file by clicking on the 'Export' button at the top of the data table.

6



After you download the file to your computer, you can open it in [Google Sheets.](https://www.google.com/sheets/about/)

7

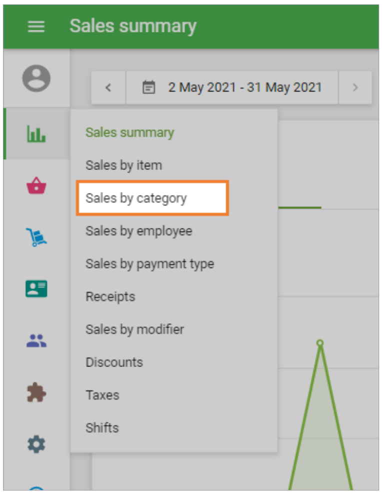


Item name	SKU	Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin
Apple Juice	1001	Hot Drinks	1	2.29	0	0	0	2.29	1.44	0.85	37.12
Beer	10018	Drinks	10	120	0	0	0	120	70	50	41.67
Beer glass 0.5 L	10010	Drinks	1	6	0	0	0	6	3.5	2.5	41.67
Black Tea	1014	Hot Drinks	1	2.39	0	0	0	2.39	0	2.39	100
Classic Cobb Sa	10006	Salads	5	37.95	0	0	0	37.95	20.6	17.35	45.72
Coffee	10014	Drinks	1	9.9	0	0	0	9.9	2	7.9	79.80
Cookies	1021	Sweets	1	5.69	0	0	0	5.69	4.48	1.21	21.27
Croissant	1011	Sweets	1	2.25	0	0	0	2.25	1.4	0.85	37.78
Fancy Cake	1020	Sweets	9	42.21	0	0	0	42.21	18	24.21	57.36
Four Cheese Piz	10003	Pizza	8	39.92	0	0	0	39.92	17.6	22.32	55.91
Fried rice	10024	Meals	2	24.24	0	0	0	24.24	0	24.24	100
Fruit Salad	1005	Fruits	1	8.49	0	0	0	8.49	3.72	4.77	56.18
Gado-gado	10025	Meals	1	4.44	0	0	0	4.44	0	4.44	100
Green Apple	1016	Fruits	2	7.18	0	0	0	7.18	1	6.18	86.07
Green Tea	1013	Hot Drinks	7	16.73	0	0	0.24	16.49	2.52	13.97	84.72
Harvest Salad	10007	Salads	7	55.93	0	0	0	55.93	27.3	28.63	51.19

7.3 Sales Report by Category

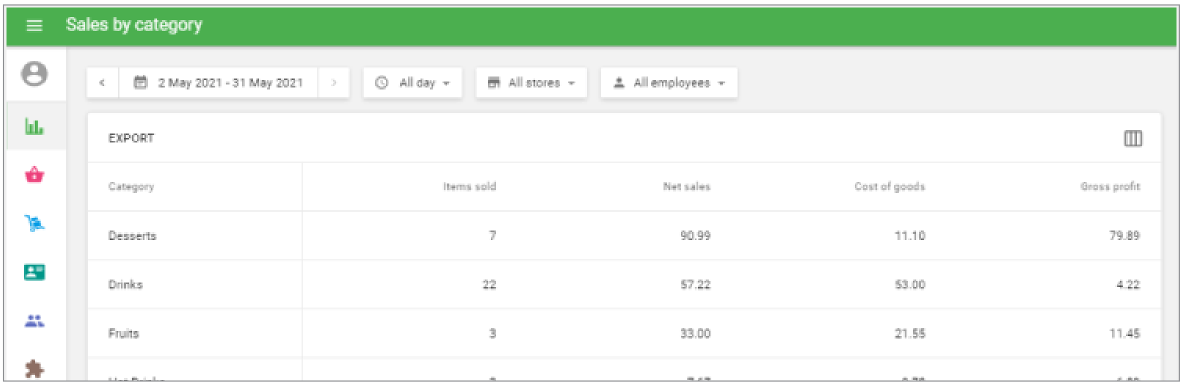
In the Back Office, go to the 'Sales by category' section.

1



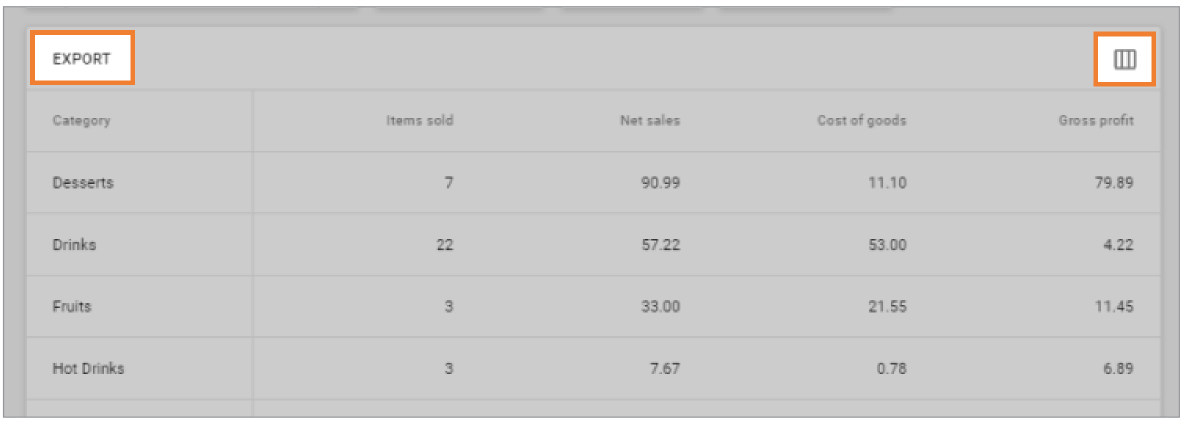
You will then see five different columns:
Category – List of categories.
Items sold – Number of items purchased per category.
Net sales – Category Revenue.
Cost of goods – Category costs.
Gross profit – Overall revenue minus costs.

2



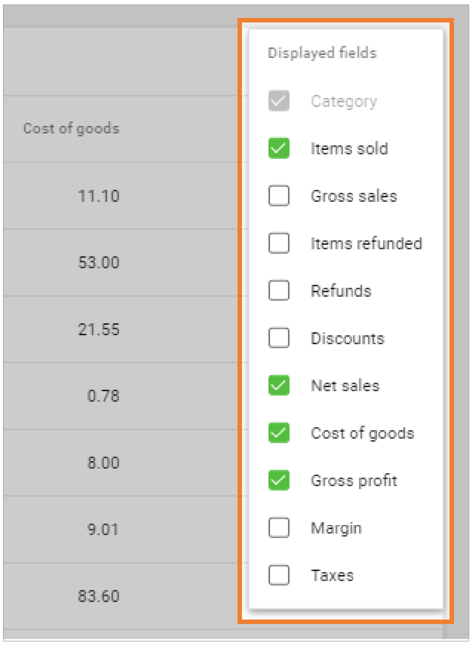
You can export the 'Sales by category' report by clicking on the 'Export' button.
You can also set up and customize the displayed columns by clicking on the three vertical lines icon on the right-hand side of the header.

3

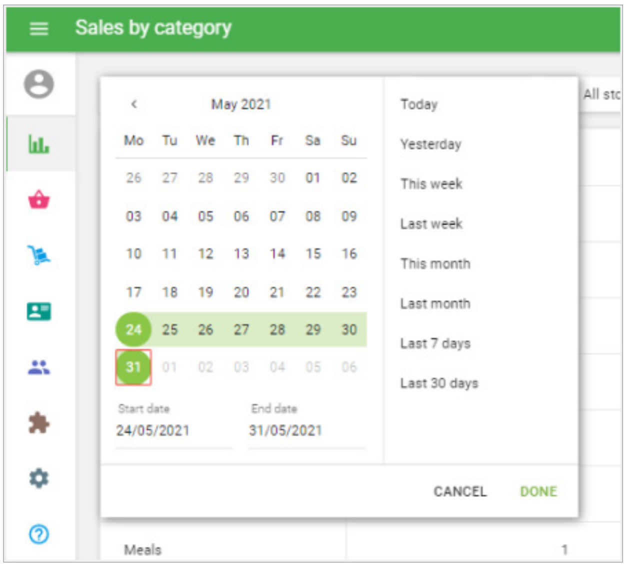


Then select your desired columns.

4



5



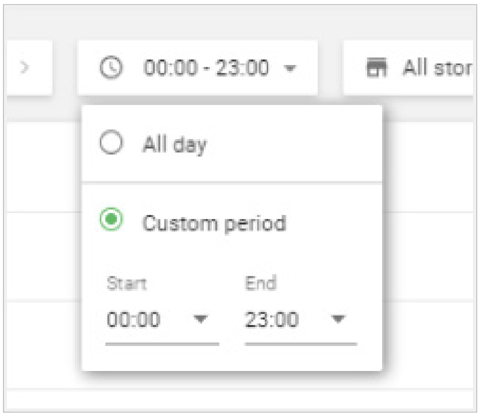
You can also choose the specific time period from which to view data: Today, Yesterday, This week, Last week, This month, Last month, Last 7 days, or Last 30 days.

Or you can select a start and end date on the calendar.

Select the period and click ‘Done’.

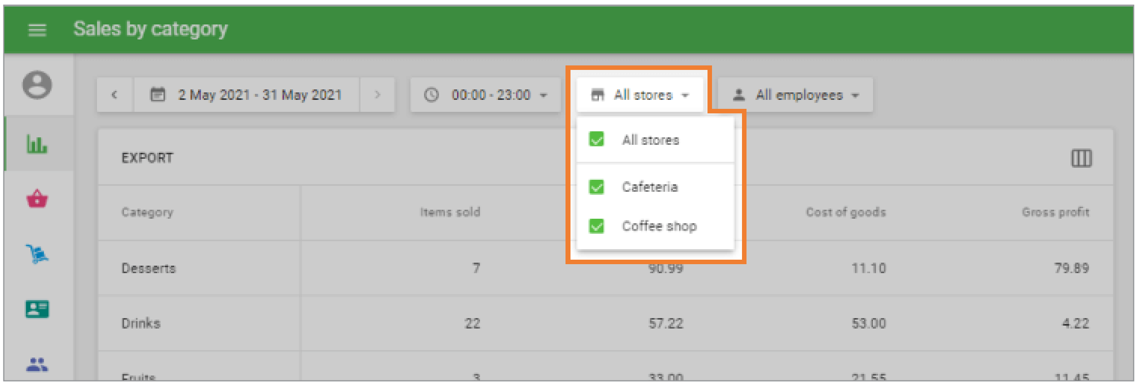
If you want to generate a report for some particular time span during each day, choose ‘Custom period’ option instead of ‘All day’ and set the start and end time.

6



If you have **multiple stores**, you can see all of your sale reports by selecting a filter for all or selected stores.

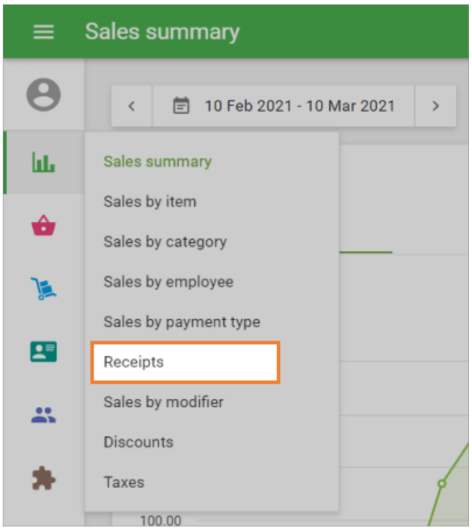
7



7.4 Receipts Section in the Reports in the Back Office

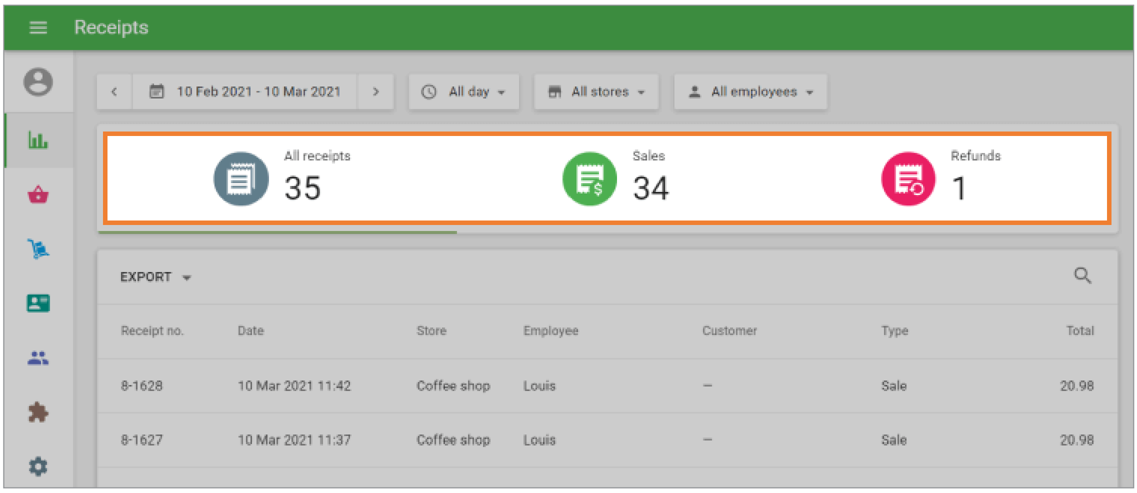
In the Back Office, go to the 'Receipts' section in the 'Reports' menu.

1



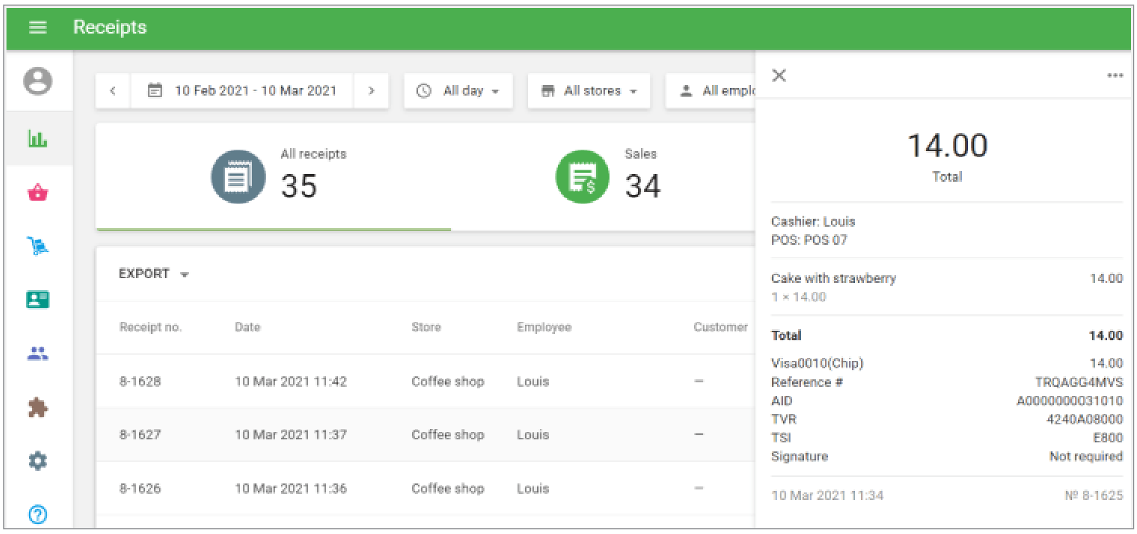
You can choose the desired period for the report with the time selectors at the top of the page. There is also an overview of different receipt types at the top of the page: 'All receipts,' 'Sales' and 'Refunds'. If you click on any of these buttons, only this type of receipt will display on the list.

2



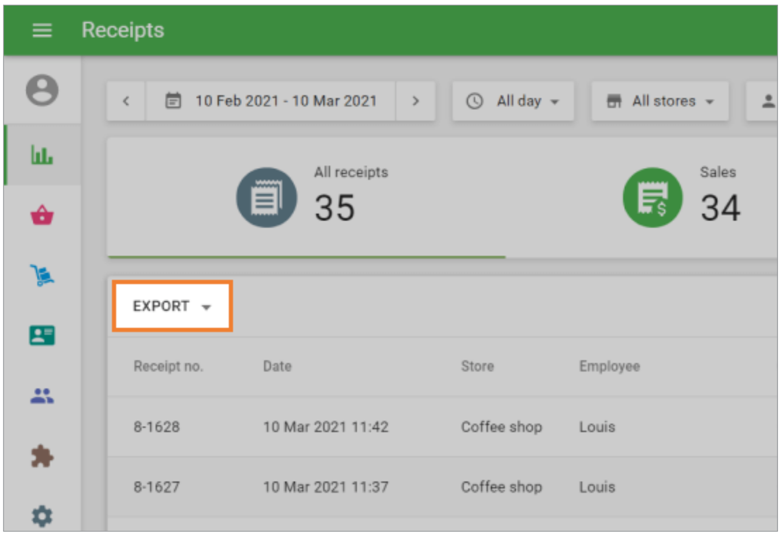
If you move the cursor over each receipt, it will highlight the entire row. If you click on it, the receipt details will appear on the right side of the screen.

3



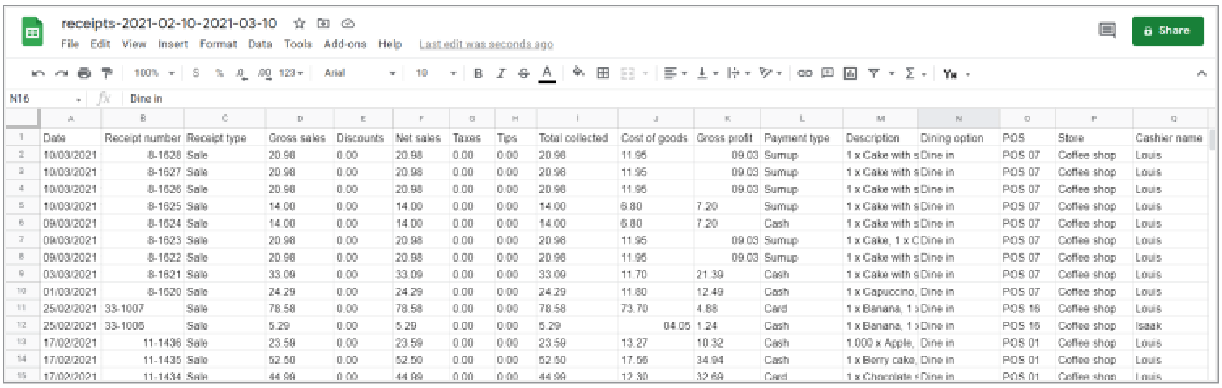
You can export specific receipt types for the desired period in CSV file by clicking on the 'Export' button.

4



After you download the file to your computer, you can [open it in Google Sheets.]()

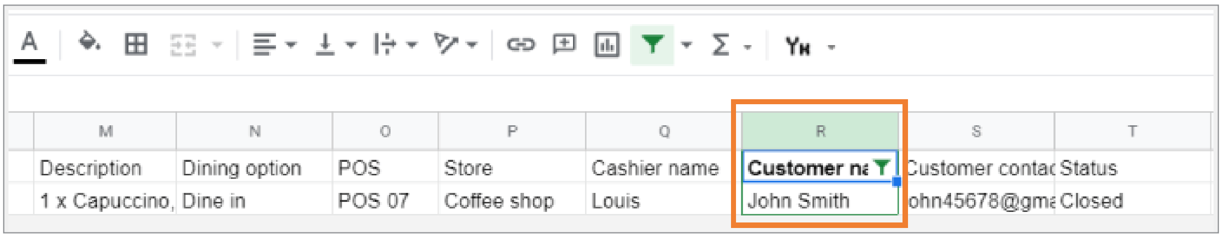
5


receipts-2021-02-10-2021-03-10

Date	Receipt number	Receipt type	Gross sales	Discounts	Net sales	Taxes	Tips	Total collected	Cost of goods	Gross profit	Payment type	Description	Dining option	POS	Store	Cashier name
10/03/2021	8-1628	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
10/03/2021	8-1627	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
10/03/2021	8-1626	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
10/03/2021	8-1625	Sale	14.00	0.00	14.00	0.00	0.00	14.00	6.80	7.20	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
09/03/2021	8-1624	Sale	14.00	0.00	14.00	0.00	0.00	14.00	6.80	7.20	Cash	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
09/03/2021	8-1623	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake, 1 x C	Dine in	POS 07	Coffee shop	Louis
09/03/2021	8-1622	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
03/03/2021	8-1621	Sale	33.09	0.00	33.09	0.00	0.00	33.09	11.70	21.39	Cash	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
01/03/2021	8-1620	Sale	24.29	0.00	24.29	0.00	0.00	24.29	11.80	12.49	Cash	1 x Capuccino,	Dine in	POS 07	Coffee shop	Louis
25/02/2021	33-1007	Sale	78.58	0.00	78.58	0.00	0.00	78.58	73.70	4.88	Card	1 x Banana, 1 x	Dine in	POS 16	Coffee shop	Louis
25/02/2021	33-1006	Sale	5.29	0.00	5.29	0.00	0.00	5.29	04.05	1.24	Cash	1 x Banana, 1 x	Dine in	POS 16	Coffee shop	Isaak
17/02/2021	11-1436	Sale	23.59	0.00	23.59	0.00	0.00	23.59	13.27	10.32	Cash	1.000 x Apple,	Dine in	POS 01	Coffee shop	Louis
17/02/2021	11-1435	Sale	52.50	0.00	52.50	0.00	0.00	52.50	17.56	34.94	Cash	1 x Berry cake,	Dine in	POS 01	Coffee shop	Louis
17/02/2021	11-1434	Sale	44.99	0.00	44.99	0.00	0.00	44.99	12.30	32.69	Card	1 x Chocolate	Dine in	POS 01	Coffee shop	Louis

You can filter or sort your sales by certain parameters, for example, See the [Purchase History of Registered Customers.]

6

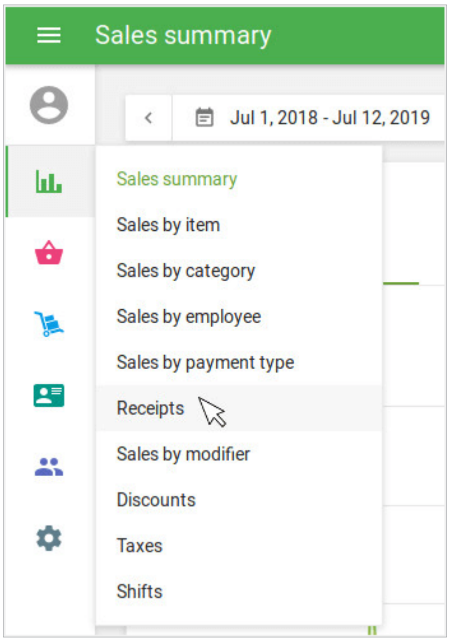


7.5 How to Cancel Receipts in Loyverse Back Office

Cancellation of receipts is necessary when a sale/refund was made by mistake or for a test. When you cancel a receipt, it will not be accounted for in the reports, and all items will be returned to stock.

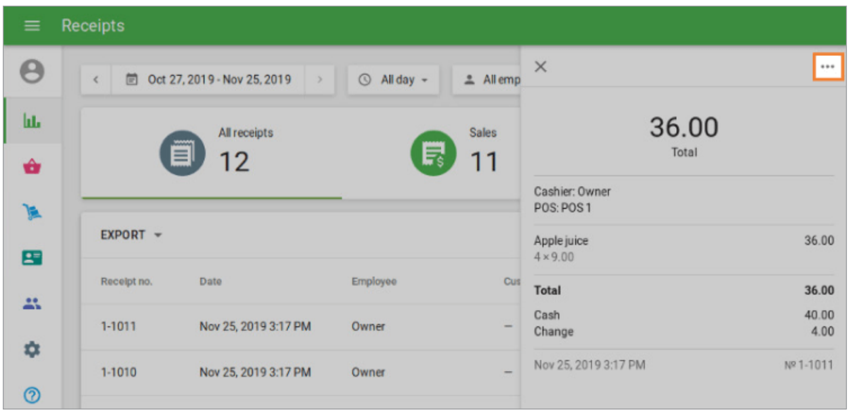
In the Back Office, go to the 'Receipts' section in the 'Reports' menu.

1



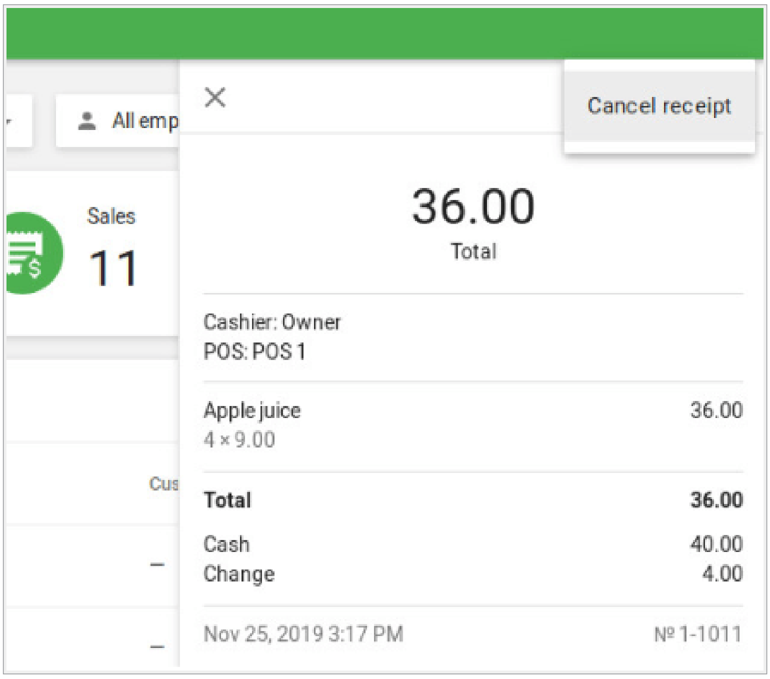
Click on the receipt that you want to cancel to see the receipt details. Click on the three dots menu in the upper right corner.

2



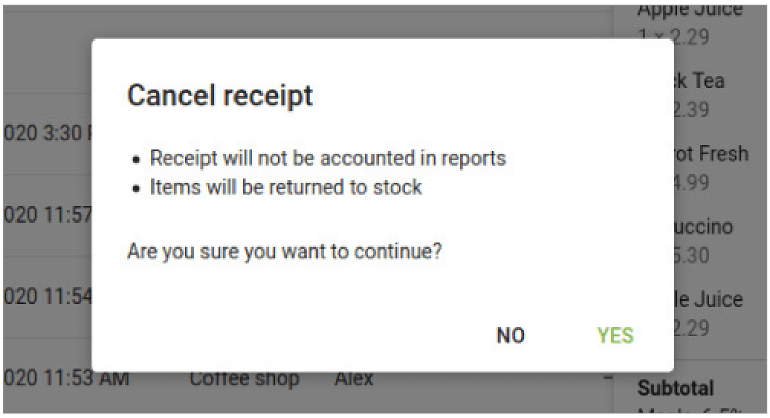
Click on the “Cancel receipt” button.

3



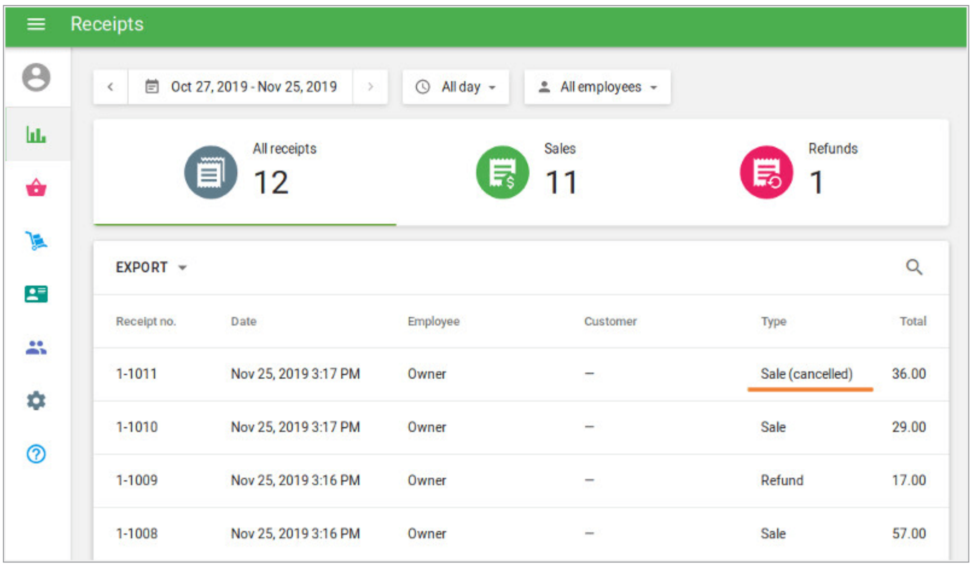
Confirm cancellation in the dialog screen.

4



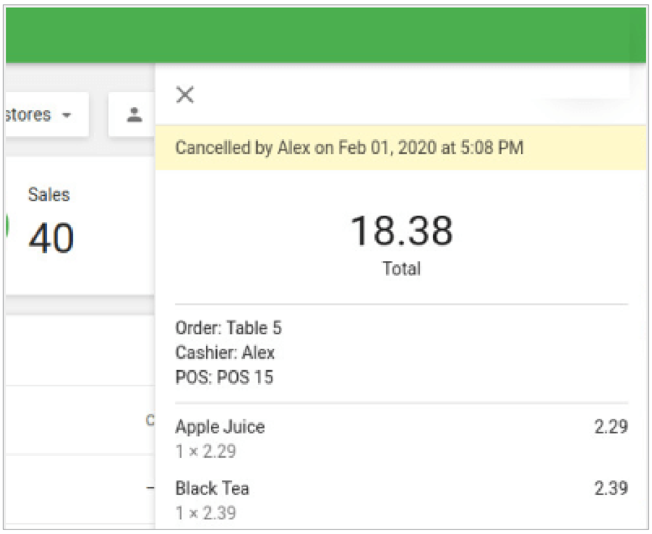
Now, this receipt is marked as cancelled in the receipts list.

5



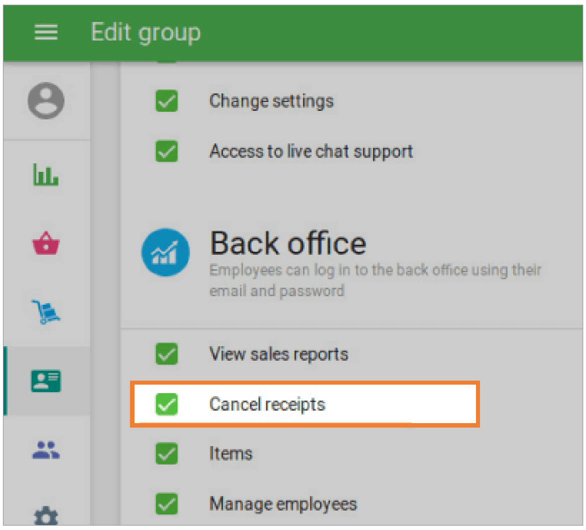
And in the receipt details, you can see who cancelled it and when it was cancelled.

6



Cancellation of receipts can be performed by users with “Cancel receipts” rights. By default, this right is set for Owner and Administrator groups.

7



After the cancellation of the receipt:

- Amounts from cancelled receipts are not taken into account when calculating data in reports in the Back Office.
- Amounts from cancelled receipts are not taken into account in both the current and closed shifts.
- The quantity of sold items is returned to the stock, but when cancelling a refund receipt, the quantity of items is deducted from the stock.

Note

The cancellation of a receipt cannot be reversed.
You cannot cancel the receipt that was fully or partially refunded without the cancellation of the refund receipt first.
In case of cancellation of the receipts with integrated card payments, funds will not be returned to the customer’s card.

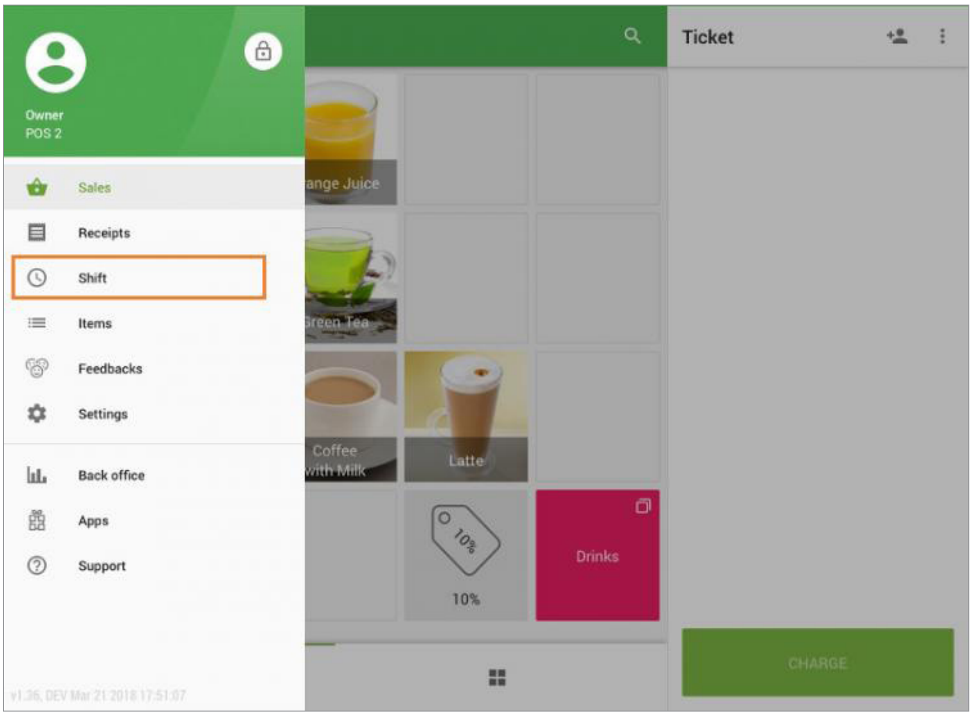
7.6 Shift Report with Sales Summary at the POS

It is possible to see the shift report when the option ‘Shifts' is switched on in the System settings in the Back Office.

You can print a shift report if at least one receipt printer has been added in the POS app settings with the option to print receipts and bills.

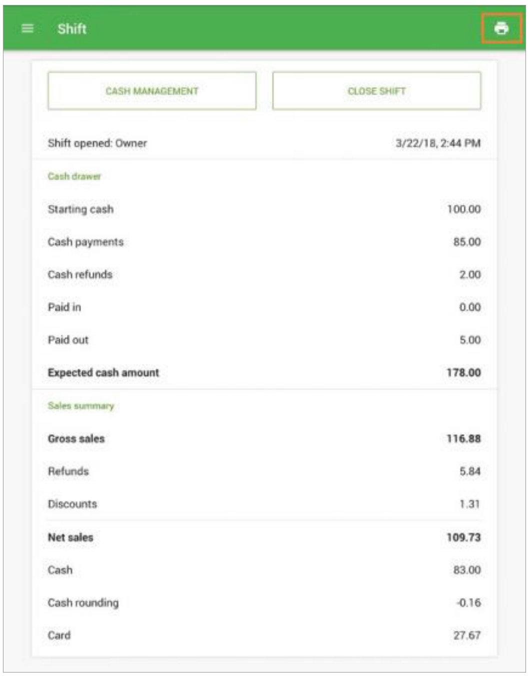
You can access the current shift report by tapping the ‘Shift’ button in the main menu.

1



The **report of the current shift** contains data of the cash drawer and the current sales summary (X-report). You can print this report on your receipt printer by tapping the ‘Print’ icon.

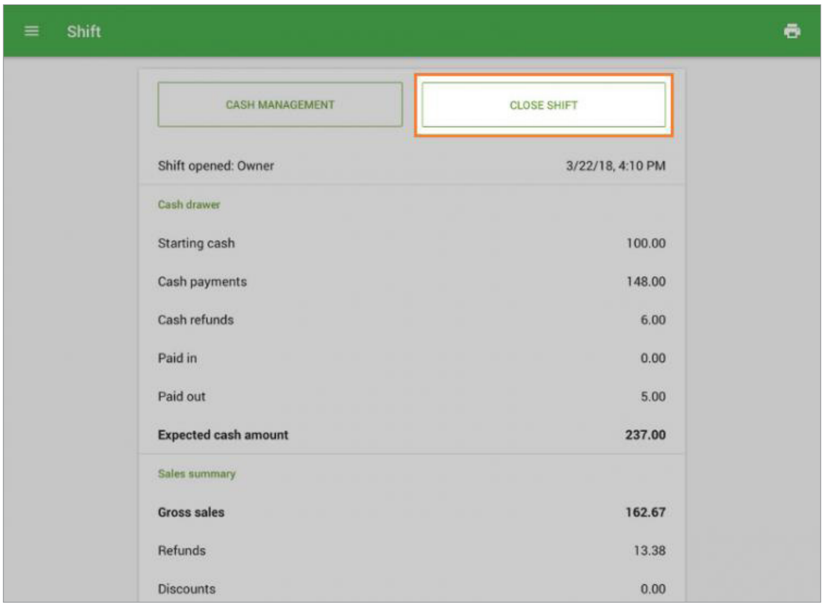
2



The closed shift report contains data of the cash drawer and the sales summary at the closing of the shift, including the actual amount of cash and the difference in comparison with the expected amount (Z-report).

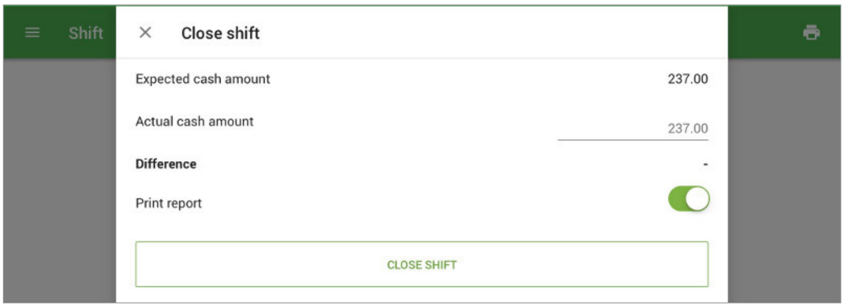
To get the **closed shift report**, tap the 'Close shift' button.

3



If the user has rights, he/she can see the 'Expected amount of cash' that is calculated from sales, refunds, and cash paid in/out during the shift. Enter the 'Actual cash amount' that is in the cash drawer, and tap the 'Close shift' button.

4



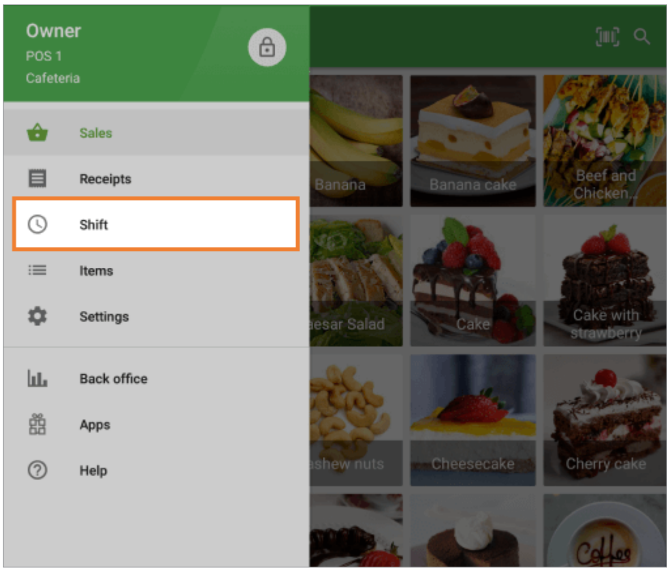
5

The closed shift report will be printed on your receipt printer.

7.7 How to Work with Shift History in the POS

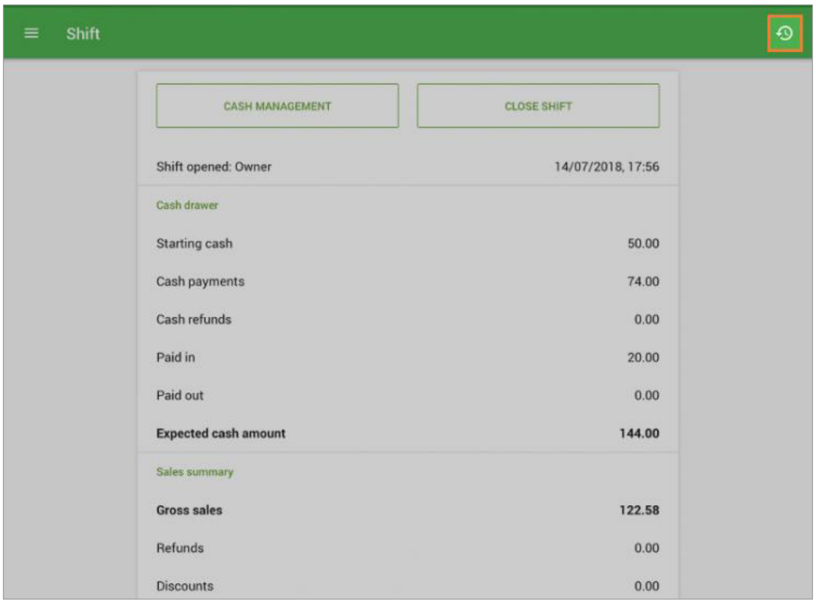
You can access the shift history by tapping the ‘Shift’ button in the main menu.

1



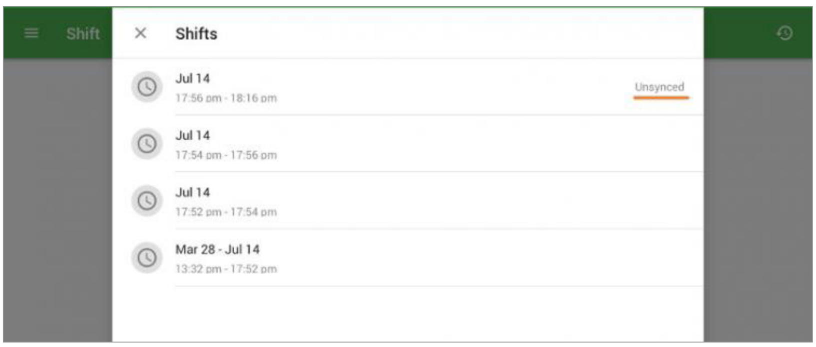
You will see the report of the current shift. Tap on the ‘history’ icon to access the shift history.

2



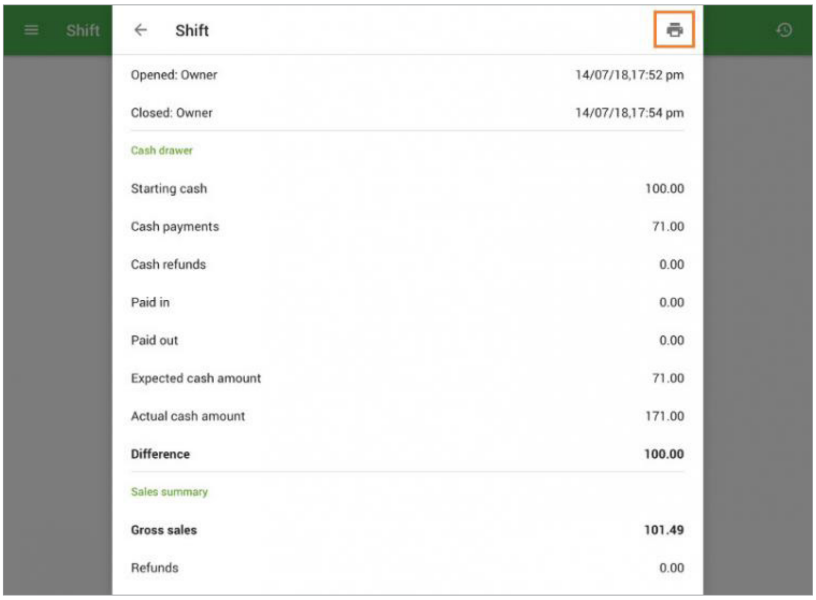
Shifts from the current POS will be displayed in the list. Non-synchronized shifts (unsynchronized events, such as openings, closing, pay-ins, payouts) will say ‘Unsynced’.

3



Tap on the shift in the list to see its details. You can print this report on your receipt printer by tapping the ‘Print’ icon.

4



Note

Viewing the shift history is available to all employees who have the "View shift report" access right.

7.8 How Taxes are Calculated

There are two types of taxes that can be applied to items at Loyverse POS ‘added to the price’ and ‘included in the price’.

An example of ‘added to the price’ tax is sales tax in the USA - where all the prices are listed without the sales tax, but during checkout, the sales tax is added to the price, and the customer pays the price of the item plus the sales tax.

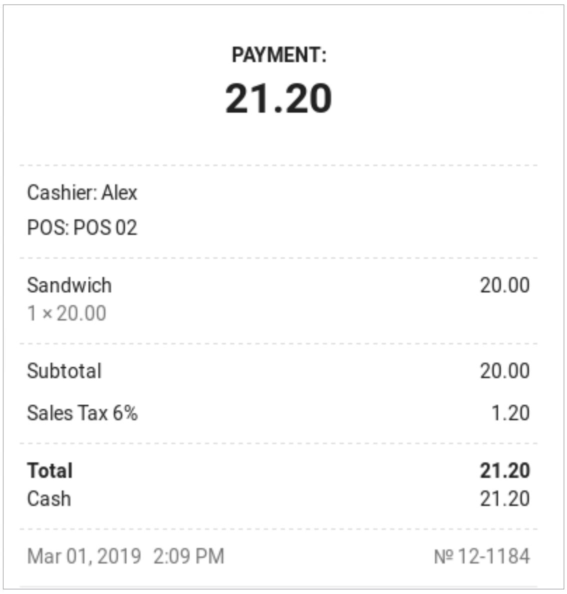
An example of ‘included in the price’ tax is value-added tax (VAT) in EU countries, also known as goods and services tax (GST) in India, Australia, Canada, Malaysia, New Zealand, and Singapore - where the tax is already included in the price listed.

7.8.1 Calculation of ‘added to the price’ tax

To calculate the value of the ‘*added to the price*’ tax, you have to multiply the item price by the tax rate in decimal form.

For example, if the tax rate is 6%, multiply the item’s price by 0.06. So if the item is 20, the value of the ‘added to the price’ tax will be 20×0.06= 1.20.

1



PAYMENT:

21.20

Cashier: Alex
POS: POS 02

Sandwich 1 × 20.00	20.00
Subtotal	20.00
Sales Tax 6%	1.20
Total	**21.20**
Cash	21.20
Mar 01, 2019 2:09 PM	№ 12-1184

7.8.2 Calculation of ‘included in the price’ tax

In the case of ‘*included in the price*’ tax, the item price consists of pre-tax price value plus the tax value.

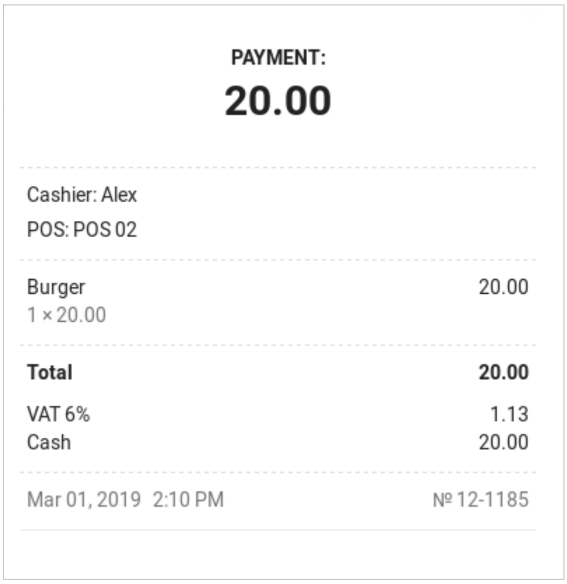
Price = PretaxPrice + Tax

And the tax will be applied to the pre-tax price.

To calculate the item's pre-tax price, divide the price by 1 + the tax rate in decimal form. To find the value of the tax that is included in the item’s price, you have to subtract the pre-tax price from the item price.

For example, if the tax rate is 6%, divide the item’s price by 1.06. So if the item is 20 with the ‘included in the price’ tax, then the value of the pre-tax price is 20/1.06 = 18.87 (rounded), and the value of the ‘included in the price’ tax is 20-18.87=1.13.

1



PAYMENT:

20.00

Cashier: Alex
POS: POS 02

Burger 1 × 20.00	20.00
Total	**20.00**
VAT 6%	1.13
Cash	20.00
Mar 01, 2019 2:10 PM	№ 12-1185

7.8.3 Application of several taxes at the same time

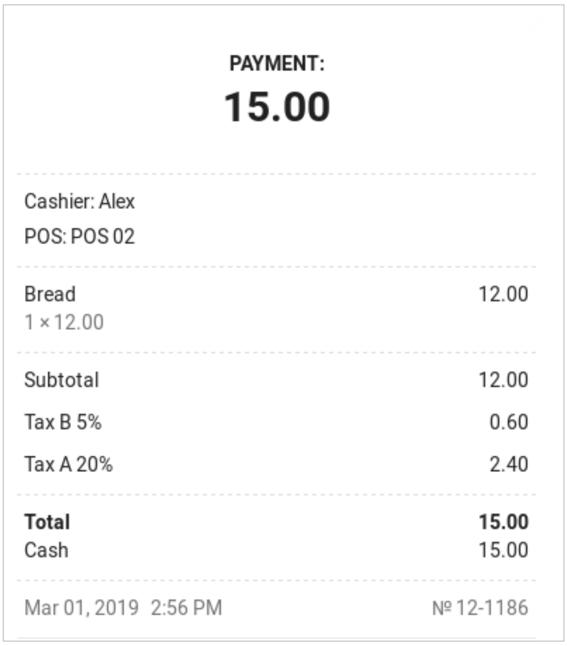
How to calculate the tax value if multiple '*added to the price*' taxes were applied to an item.

The value of multiple 'added to the price' taxes of an item is calculated in the same way as if only one tax is applied (see above).

For example, if you sell an item at 12.00 with added tax A=20% and added tax B=5%, the tax values will be 2.40 and 0.60 respectively:

TA = 12×0.20=2.4; TB = 12×0.05=0.6

1


PAYMENT:
15.00

Cashier: Alex
POS: POS 02

Bread 1 × 12.00	12.00
Subtotal	12.00
Tax B 5%	0.60
Tax A 20%	2.40
Total	**15.00**
Cash	15.00
Mar 01, 2019 2:56 PM	№ 12-1186

How to calculate the tax value if multiple '*included in the price*' taxes were applied to an item

The value of 'included in the price' tax of an item is calculated as the multiplication of the price of the item and the tax rate, divided by the sum of the rates of all included taxes plus one:

$$TI = \frac{p \times TIPV}{(1 + \sum_i TIPV_i)}$$

where

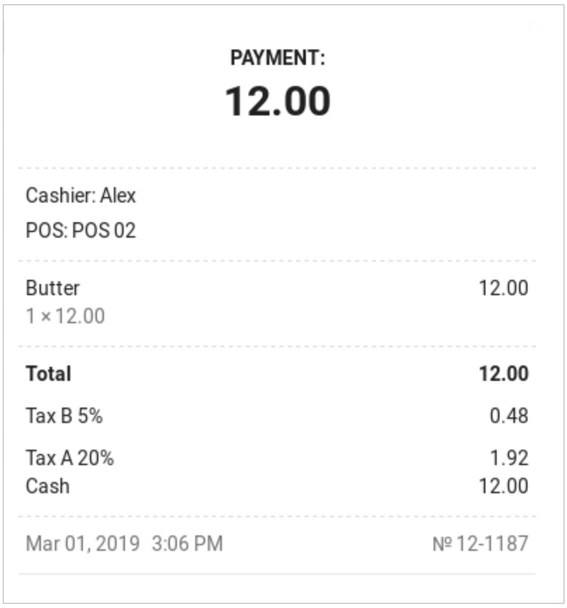
TI = the value of the 'included in the price' tax
p = the price of the item
TIPV = the included tax rate in decimal form
i = the number of tax rates included in the price

For example, if you sell an item at 12.00 with included tax A=20% and included tax B=5%, the value of TI will be 1.92 and 0.48 respectively:

$$TI_A = \frac{12 \times 0.2}{(1 + 0.2 + 0.05)} = 1.92$$

$$TI_B = \frac{12 \times 0.05}{(1 + 0.2 + 0.05)} = 0.48$$

2



PAYMENT:
12.00

Cashier: Alex
POS: POS 02

Butter 1 × 12.00	12.00
Total	**12.00**
Tax B 5%	0.48
Tax A 20%	1.92
Cash	12.00
Mar 01, 2019 3:06 PM	№ 12-1187

How to calculate the value of the ‘*added to the price*’ tax if the price has included taxes

The value of the ‘added to the price’ tax of an item is calculated as the multiplication of the rate of the added tax by the price of the goods reduced by the sum amount of the included taxes:

$$TA = TAPV \times (p - \sum_i TI_i)$$

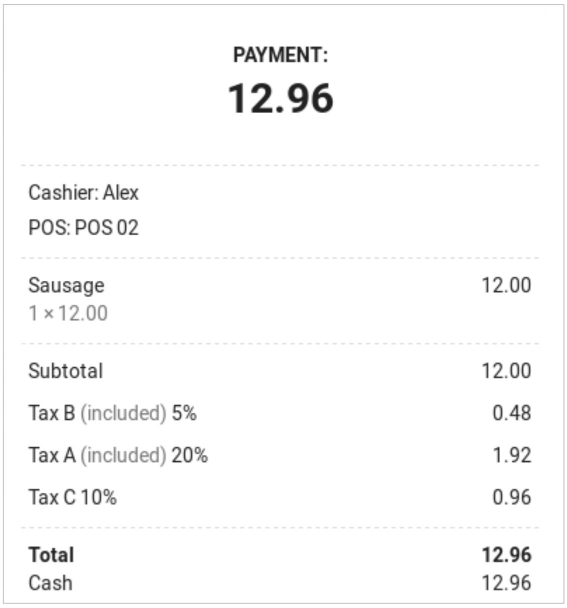
where

TA = the value of the ‘added to the price’ tax
p = the price of the item
TAPV = the added tax rate in decimal form (1%=0.01)
TI = the value of the ‘included in the price’ tax
i = the number of tax rates included in the price

For example, if you sell an item at 12.00 with included tax A=20% and included tax B=5%, and also added tax C=10%, the value of TA will be 0.96:

$$TA = 0.1 \times (12 - (1.92 + 0.48)) = 0.96$$

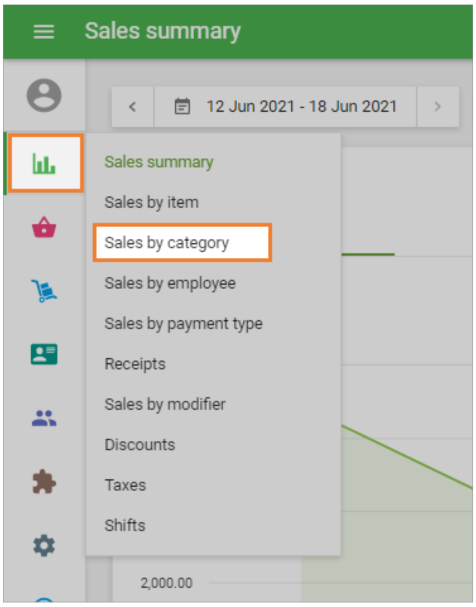
3



7.9 How to Export Data from Reports and Open in Excel

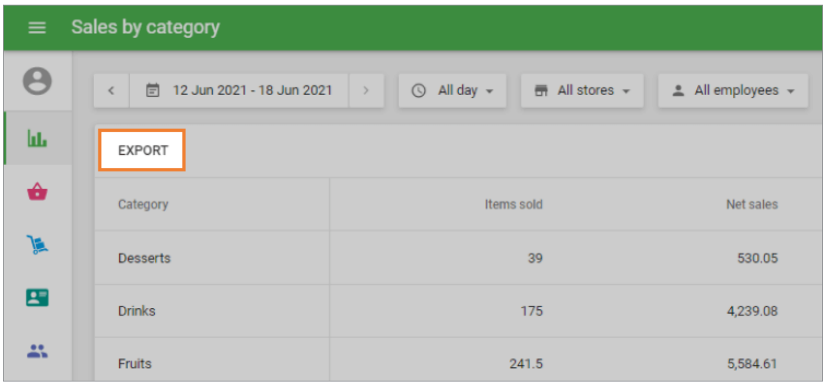
Select your Report in Back Office, in the “Reports” section. For example, view “Sales by category”.

1



After selection of the required period, press the “Export” button.

2



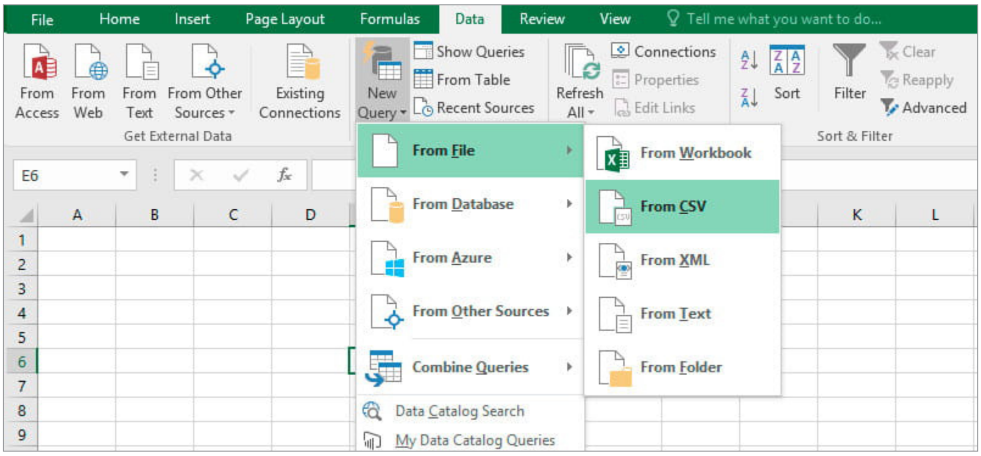
And enter your filename. Loyverse POS can export data in the CSV spreadsheet. Now you have the file saved on your computer.

Next, you have to open your file through Microsoft Excel.

3

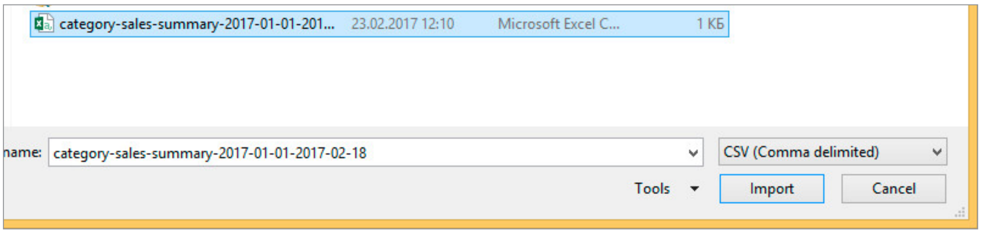
In Microsoft Exel, select ‘Data - New Query... - From CSV’.

4



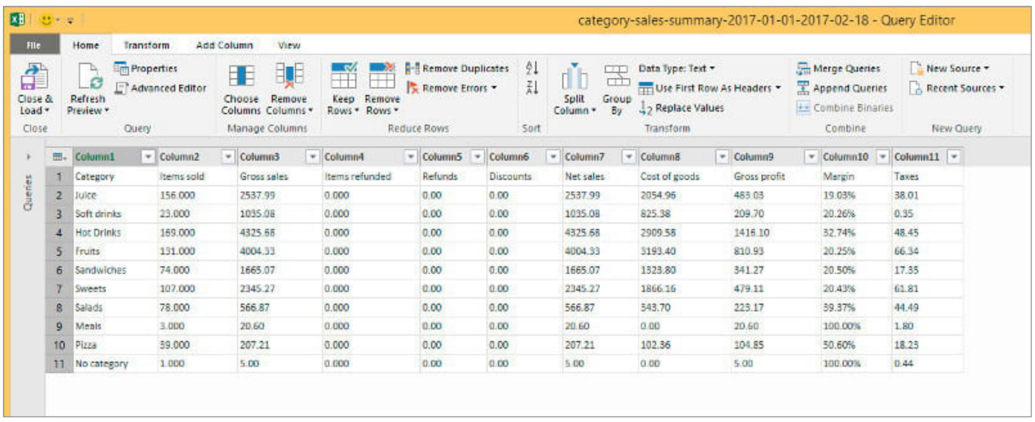
Select your CSV file and click ‘Import’.

5



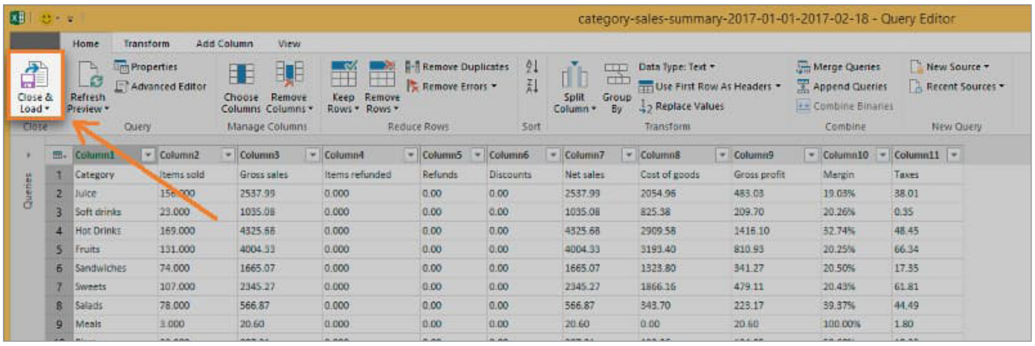
You will see a ‘Query Editor’ window with table.

6



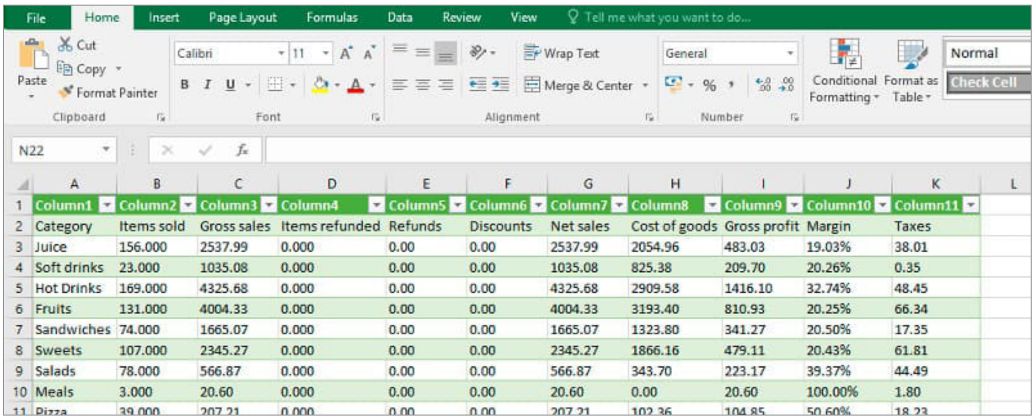
Click ‘Close & Load’.

7



As a result, you have opened the table with the exported sales report by category.

8

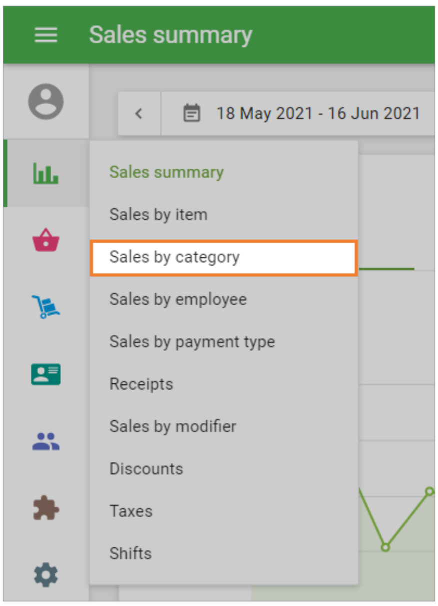


Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11
Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin	Taxes
Juice	156.000	2537.99	0.000	0.00	0.00	2537.99	2054.96	483.03	19.03%	38.01
Soft drinks	23.000	1035.08	0.000	0.00	0.00	1035.08	825.38	209.70	20.26%	0.35
Hot Drinks	169.000	4325.68	0.000	0.00	0.00	4325.68	2909.58	1416.10	32.74%	48.45
Fruits	131.000	4004.33	0.000	0.00	0.00	4004.33	3193.40	810.93	20.25%	66.34
Sandwiches	74.000	1665.07	0.000	0.00	0.00	1665.07	1323.80	341.27	20.50%	17.35
Sweets	107.000	2345.27	0.000	0.00	0.00	2345.27	1866.16	479.11	20.43%	61.81
Salads	78.000	566.87	0.000	0.00	0.00	566.87	343.70	223.17	39.37%	44.49
Meals	3.000	20.60	0.000	0.00	0.00	20.60	0.00	20.60	100.00%	1.80

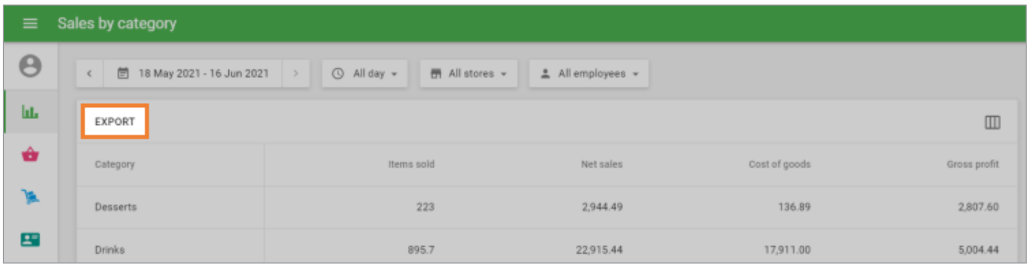
7.10 How to Export Data from Reports and Open in LibreOffice Calc or OpenOffice Calc

Select your Report in Back Office, in the 'Reports' section. For example, view 'Sales by category'.

1



2



And enter your filename. Loyverse POS can export data in the CSV spreadsheet. Now you have the file saved on your computer.

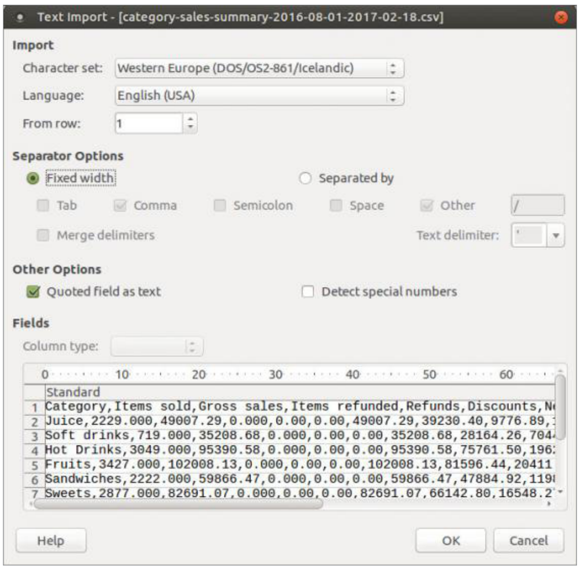
Next, you have to open your file trough LibreOffice Calc (or OpenOffice Calc).

3

In LibreOffice Calc, select ‘File - Open…’ (CTRL + O) and select your CSV file.

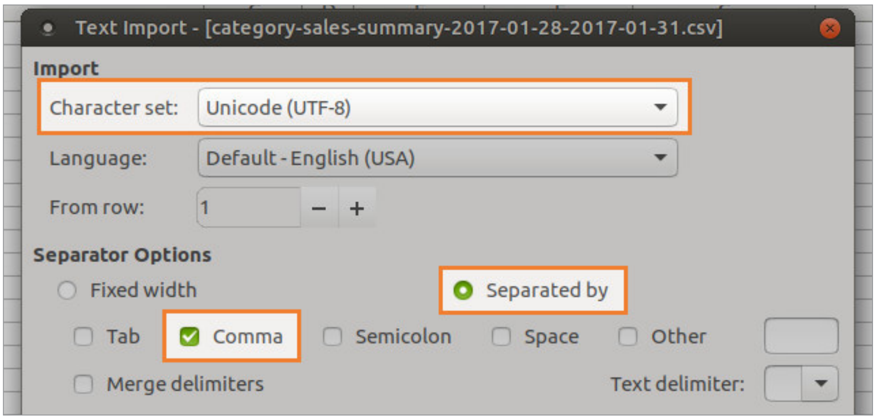
You will see a ‘Text Import’ window. You have to set up correct options to open the file.

4



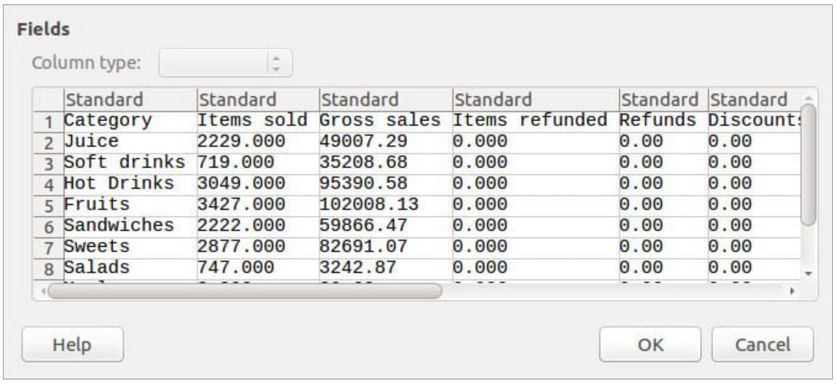
Select ‘Unicode (UTF-8)’ encoding in ‘Character set’ drop-down list.
In Separator Options, select 'Separated by' and select checkbox 'Comma'.

5



As soon as you set up correct options, you will see table with your data in the preview window.

6

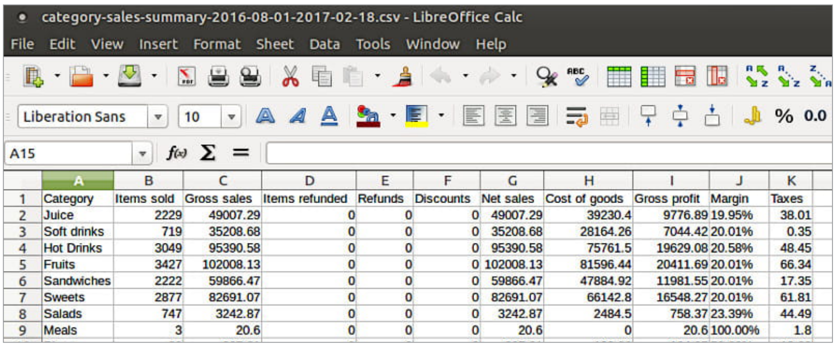


	Standard	Standard	Standard	Standard	Standard	Standard
1	Category	Items sold	Gross sales	Items refunded	Refunds	Discount:
2	Juice	2229.000	49007.29	0.000	0.00	0.00
3	Soft drinks	719.000	35208.68	0.000	0.00	0.00
4	Hot Drinks	3049.000	95390.58	0.000	0.00	0.00
5	Fruits	3427.000	102008.13	0.000	0.00	0.00
6	Sandwiches	2222.000	59866.47	0.000	0.00	0.00
7	Sweets	2877.000	82691.07	0.000	0.00	0.00
8	Salads	747.000	3242.87	0.000	0.00	0.00

Click 'OK' botton to open file.

As a result, you have opened the table with the exported sales report by category.

7



	A	B	C	D	E	F	G	H	I	J	K
1	Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin	Taxes
2	Juice	2229	49007.29	0	0	0	49007.29	39230.4	9776.89	19.95%	38.01
3	Soft drinks	719	35208.68	0	0	0	35208.68	28164.26	7044.42	20.01%	0.35
4	Hot Drinks	3049	95390.58	0	0	0	95390.58	75761.5	19629.08	20.58%	48.45
5	Fruits	3427	102008.13	0	0	0	102008.13	81596.44	20411.69	20.01%	66.34
6	Sandwiches	2222	59866.47	0	0	0	59866.47	47884.92	11981.55	20.01%	17.35
7	Sweets	2877	82691.07	0	0	0	82691.07	66142.8	16548.27	20.01%	61.81
8	Salads	747	3242.87	0	0	0	3242.87	2484.5	758.37	23.39%	44.49
9	Meals	3	20.6	0	0	0	20.6	0	20.6	100.00%	1.8

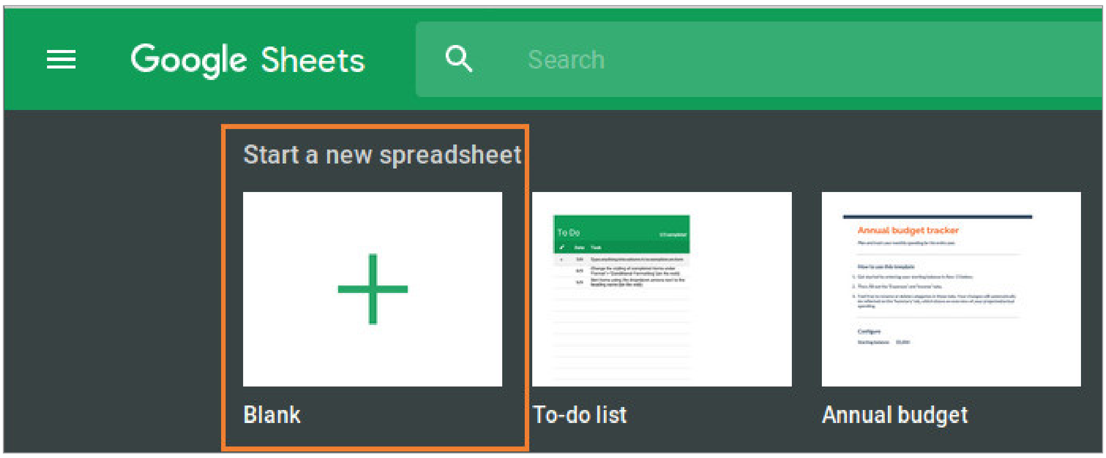
7.11 How to Open CSV File in Google Sheets

CSV files are used in the Back Office for exporting reports, importing-exporting items, and clients.

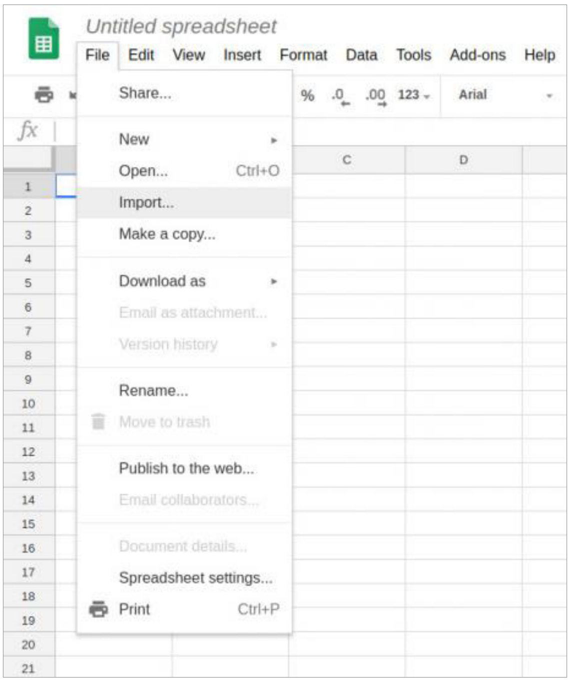
For opening this type of files, you can use Google Sheets.

Go to Google Sheets and click on the button ‘Start a new spreadsheet’.

1

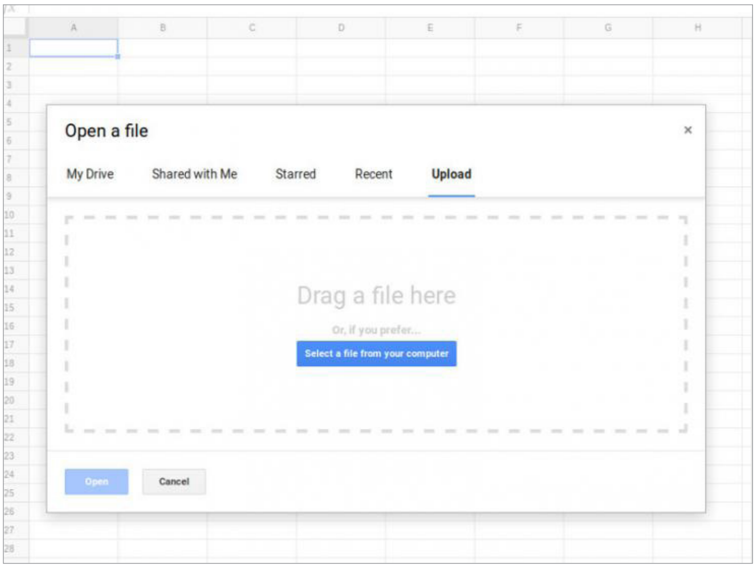


2



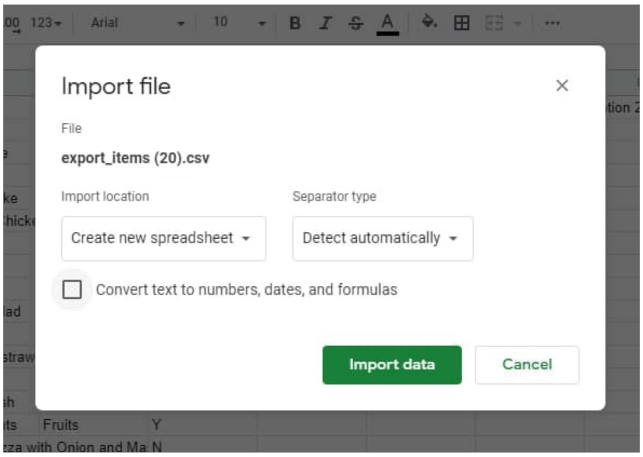
Go to the ‘Upload’ tab of the ‘Open a file’ window and select your file from your computer.

3



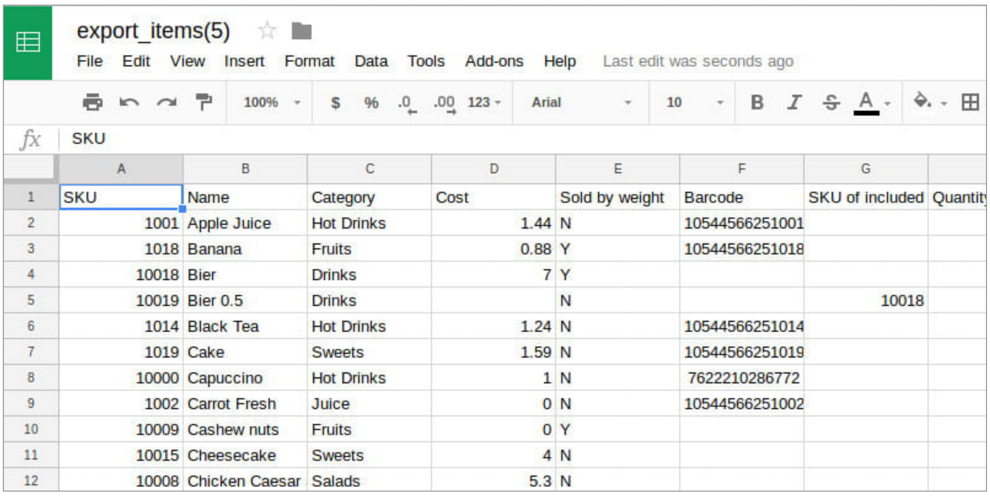
In the Import file settings window, unselect the checkbox ‘Convert text to numbers, dates, and formulas', and then click on the ‘Import data' button.

4



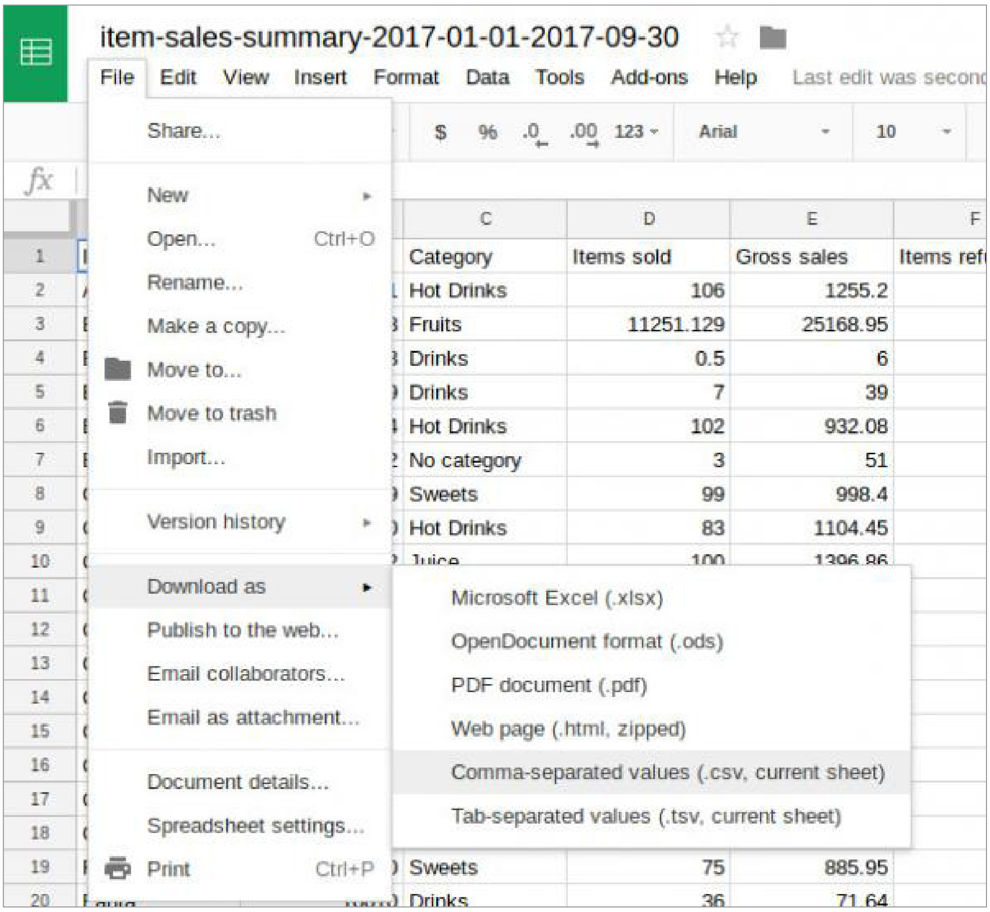
As a result, you have opened CSV file as a table.

5



Now you can edit this spreadsheet.
If you want to save the spreadsheet in the CSV format to your computer for further importing in the Loyverse Back Office, go to ‘File’ menu, select ‘Download as’ and click on ‘Comma-separated values’ button.

6



7.12 Using Loyverse Dashboard

Loyverse Dashboard App (Android, iOS) gives you instant access to your store's most valuable data. Complementing the Loyverse POS app, it puts key real-time information about your business at your fingertips allowing you to make important decisions immediately.

To start using Loyverse Dashboard, sign in with the same email and password you use to access Loyverse POS Back Office.

What you see right away is today's sales summary chart: the number of receipts, net sales figure and the average ticket size. The chart also shows a comparison to the previous day's data - this way you can quickly evaluate the two periods.

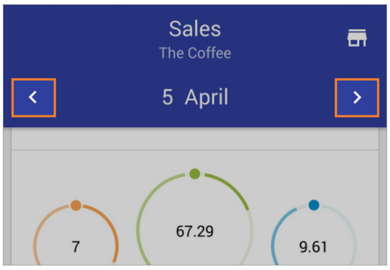
1

For more details just tap the chart to view sales breakdown.

2

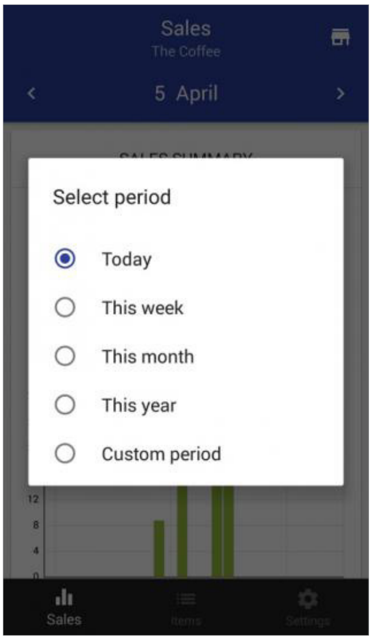
To return to the chart view, tap the Back arrow or Sales icon in the bottom menu.
You can navigate back and forth in time by tapping the arrows left and right of the date.

3



When you'd like to analyze a longer period, tap the date and select this week, month, or even an entire year.

4



If you want to set a custom time period, use the calendar and tap the beginning and the ending dates.
Depending on the selected time period, the sales bar chart will show data broken down by an hour, day, or month.

If you want to analyze your sales for some particular period during each day, click "Custom period" and turn off the toggle "All day".

5

Then set the start and end times of the day you need.

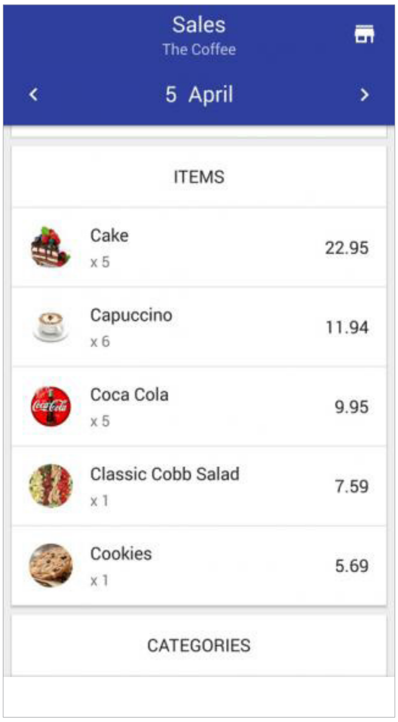
6

Click the “Apply” button.

Pinch the bar chart to change its scale or tap it to see the exact values for selected bars.

Scroll down to view your sales by items, categories, and employees.

7



Again, if you want more details, tap the appropriate screen to drill down and tap the back arrow to return to the main screen. In each detailed view, it may be convenient to sort the list by tapping the sort arrow.

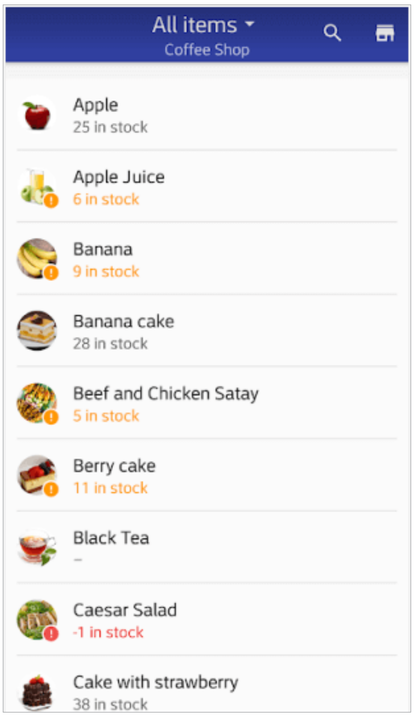
7.12.1 Stock Alerts

To keep on selling, you have to make sure your store carries sufficient stock. To check the stock status, switch to the Items tab.

Here you see items that are currently in stock, low on stock (yellow), or out of stock (red).

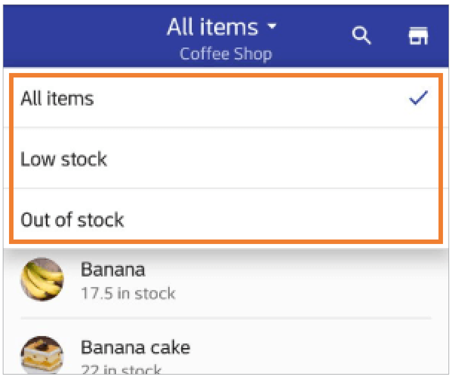
The symbol "-" near item means that the "Track stock" option for this item is off in the Back office.

1



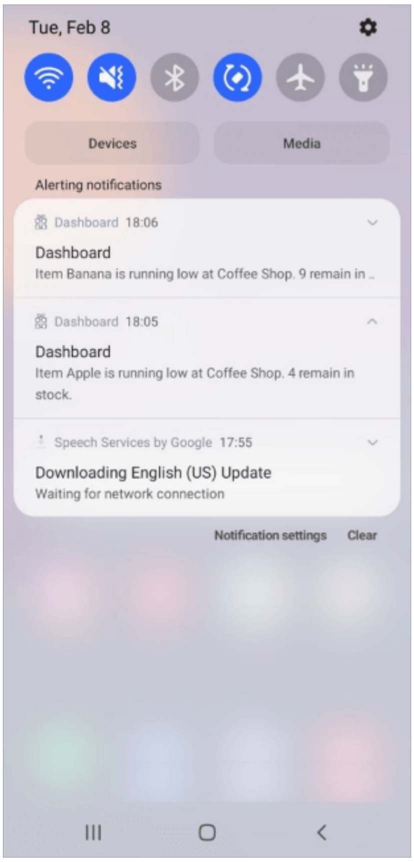
To refine the picture, you can use the filter to see only low-stock or out-of-stock items.

2



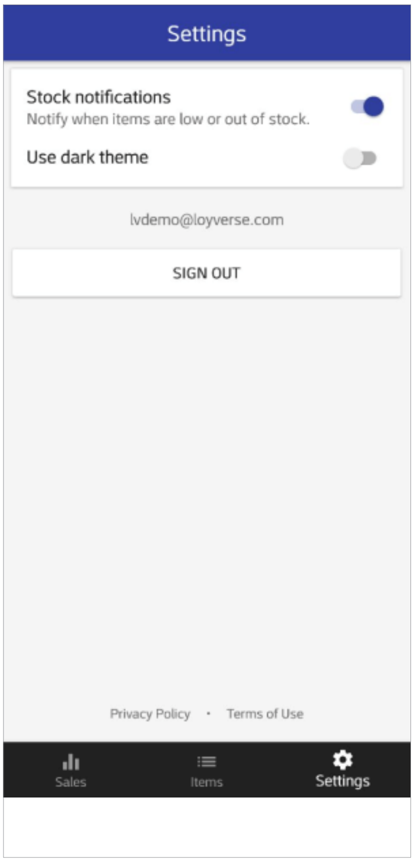
Whenever a sale is made, and the stock gets depleted, you will receive a push notification.

3



If you don't like to receive instant stock alerts, turn this feature off in the Settings tab.

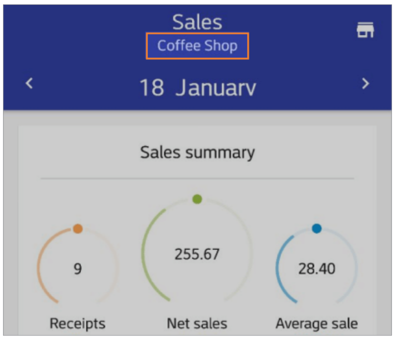
4



In order to use the dark theme, turn the “Use dark theme” toggle on.

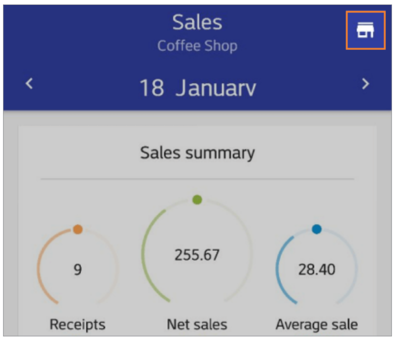
If you have more than one store you will see the name of current store at the top of the main screen.

5



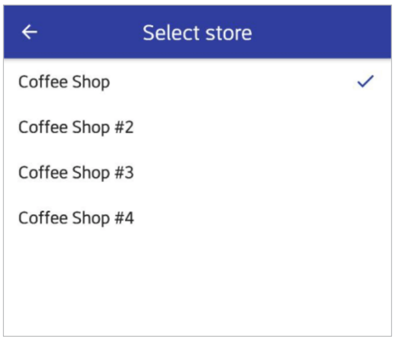
In order to see the information from a different store, click the “Store” icon at the top right of the screen.

6



You will see the list of all your stores from which you can choose the needed one.

7



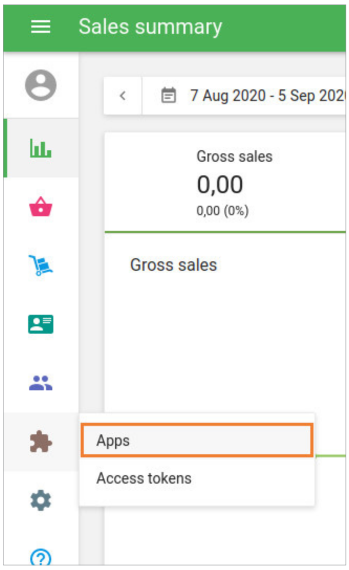
7.13 How to Connect Apps from the Marketplace to Loyverse

You can connect third-party apps to Loyverse to automate your business workflows.

There are two options how to connect apps:
1. Choose an app from the marketplace and approve its access to your account;
2. Create tokens that provide full access to your account via API.

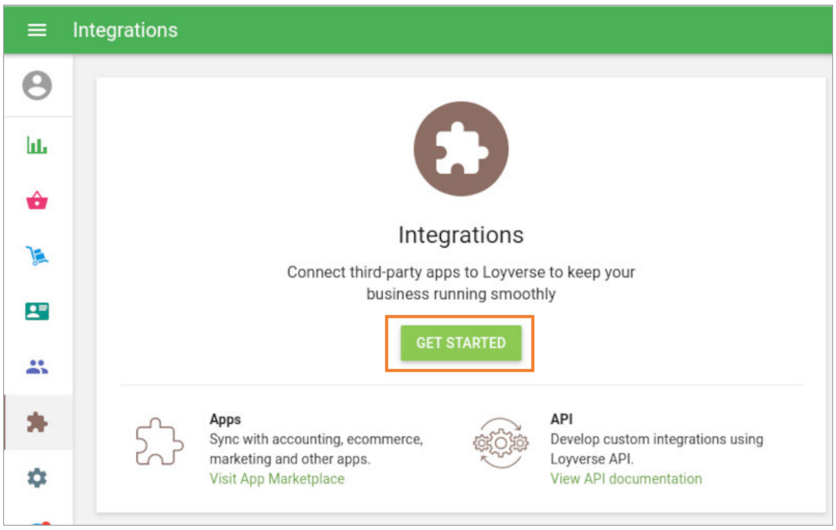
Enter the Back Office and open the 'Apps' section.

1



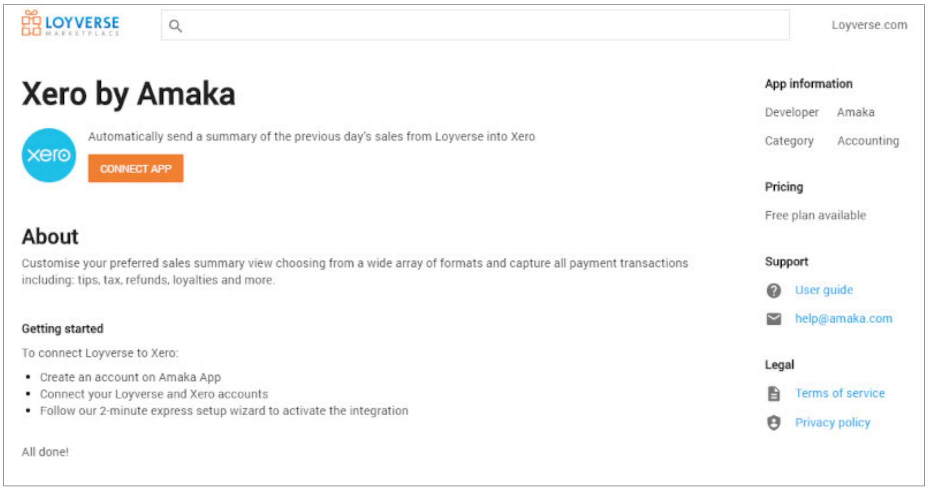
You have to start a trial period to use integrations features.

2



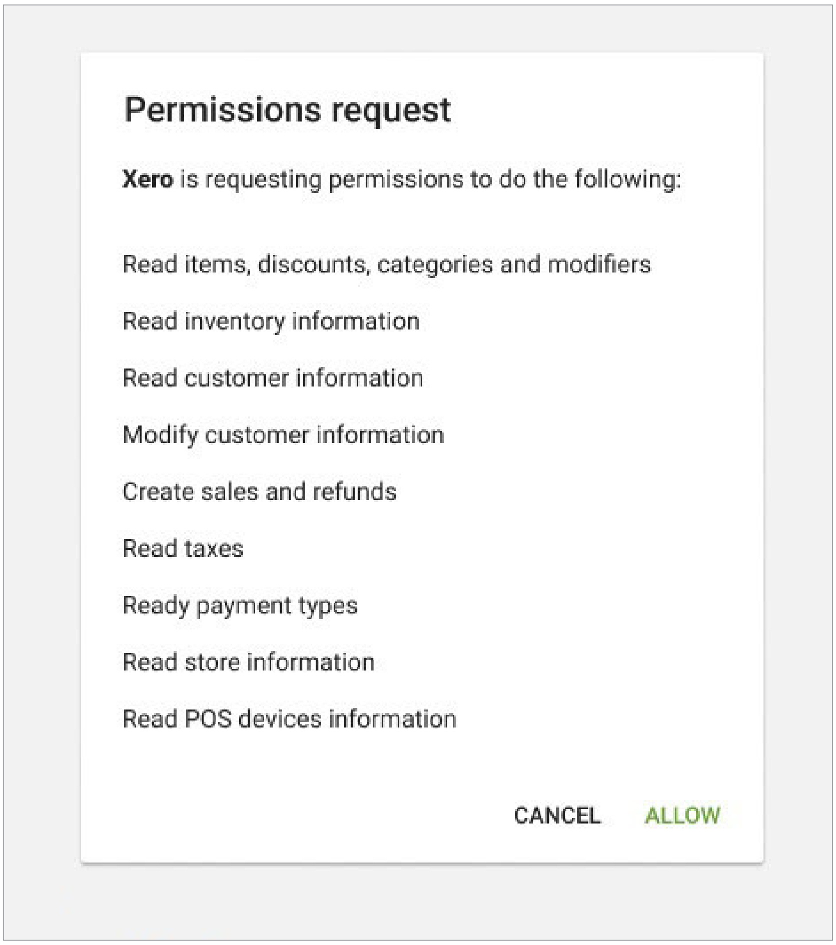
Once integration features are available in your account, you can go to the Loyverse App Marketplace. Find apps that you want to connect and click the ‘Connect app’ button.

3



Follow the workflow of integration on the app developers' site.
While processing the integration, you will be asked to grant access to your Loyverse account. The permission request form will contain the list of permissions this app needs. To confirm permission request and proceed, click the ‘Allow’ button.

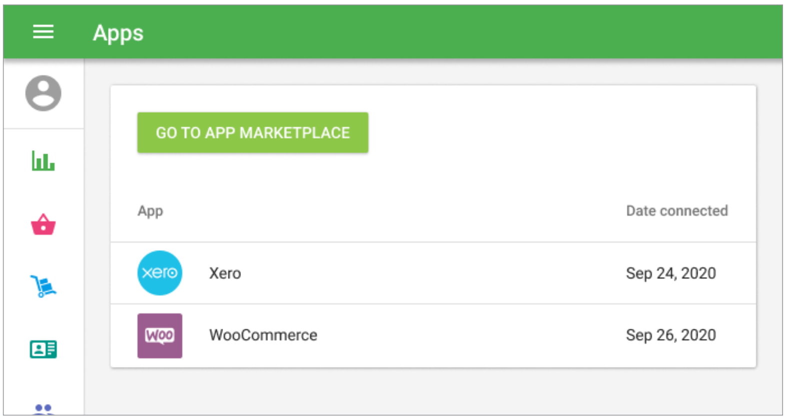
4



After that, you will be redirected to an app to continue the integration setup. Follow the steps of an integration setup and complete it. In most cases, you will have to create an account in another system.

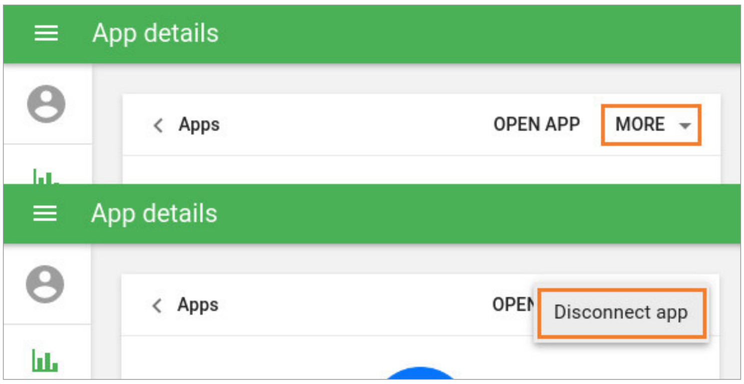
All connected apps will be displayed in your Back Office in the 'Apps' section.

5



At any time, you can disable the application and deny it access to the account.

6



Check Loyverse Marketplace for the apps that allow integration with different platforms:

Accounting:

- QuickBooks
- Xero

eCommerce and marketplaces:

- Shopify
- WooCommerce
- Magento
- BigCommerce
- Amazon
- eBay
- Lazada
- Wix
- OpenCart
- nopCommerce
- Google Shopping
- Fancy
- ChannelAdvisor
- Souq
- Wordpress

Online ordering:

- UberEats
- Doordash
- Grubhub
- Zomato
- Glovo
- Rappi
- and many other regional players

Marketing:

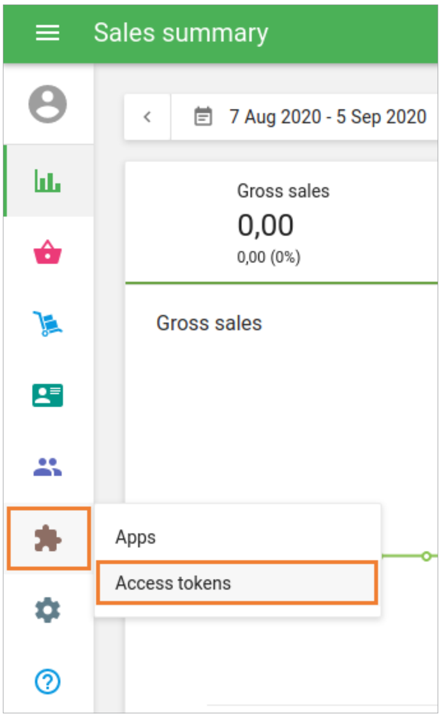
- Mailchimp
- Constant Contact
- Connectors:
- Google Data Studio
- Power BI
- Mailchimp
- Telegram
- Wave
- TradeGecko
- Google Drive
- Google Sheet

7.14 How to Create Tokens for API

Access to the API is possible via https requests. Each request should contain the access key to the Loyverse account (token).

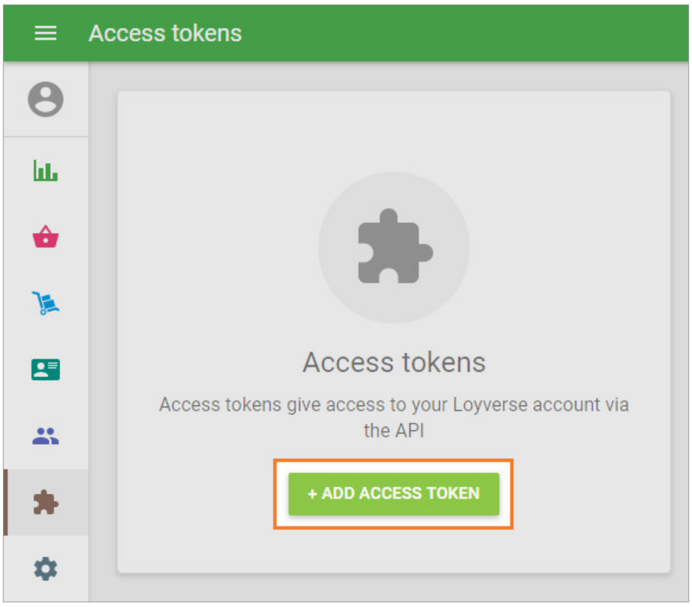
Enter the Back Office and open the 'Access Tokens' section.

1



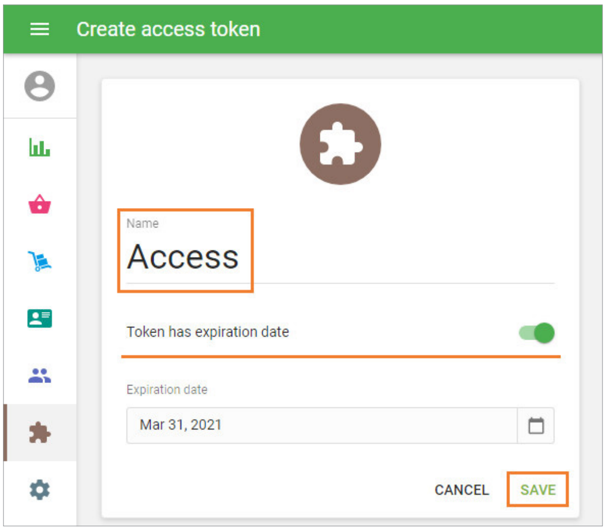
To create a new token, click on the '+ Add access token' button.

2



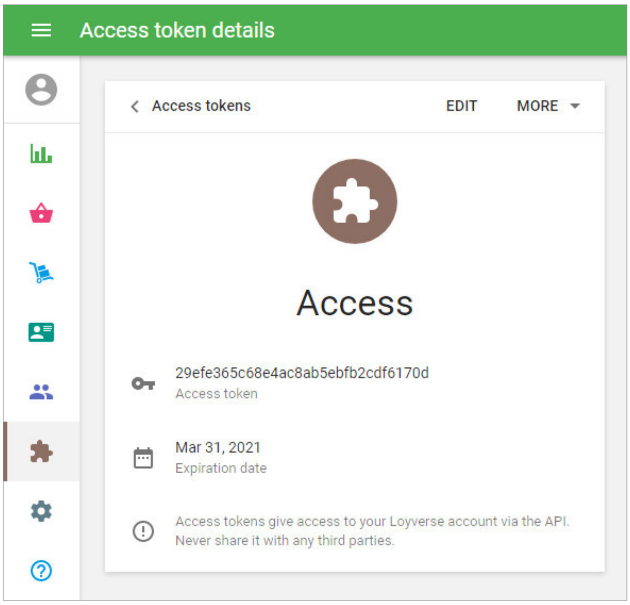
The form ‘Create access tokens’ will open for editing. Fill in the ‘Name’ field and set the token expiration date if needed. After clicking on the ‘Save’ button, the Access token will be created.

3



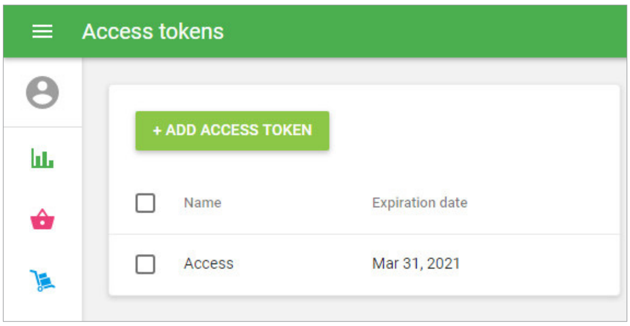
Here you can edit or delete the token and also copy the token for further use. If you delete the token, the access to the data by this token will be suspended. By clicking on the ‘Access tokens,’ you will return to the tokens list.

4



You can see created tokens and create new ones.

5



Note

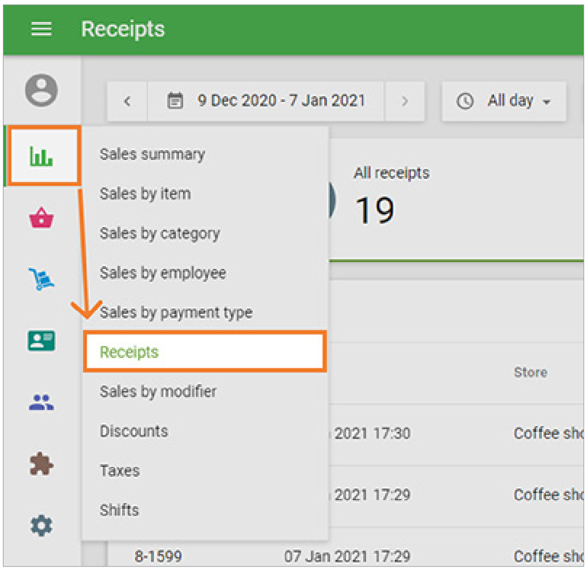
The token gives unlimited access to all resources provided by the Loyverse API. Up to 20 tokens can be created for one account.

7.15 How to See the Purchase History of Registered Customers at the Back Office

After you have set up the customer loyalty program which connects sale records to customers, you may also want to see the purchase history of your regular customers. You can access information about customer purchases through the ‘Receipts’ report.

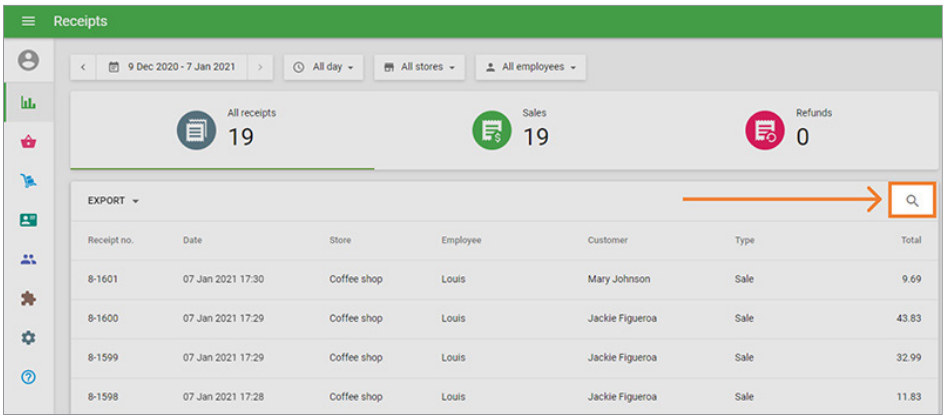
In the Back Office, go to the ‘Receipts’ section.

1



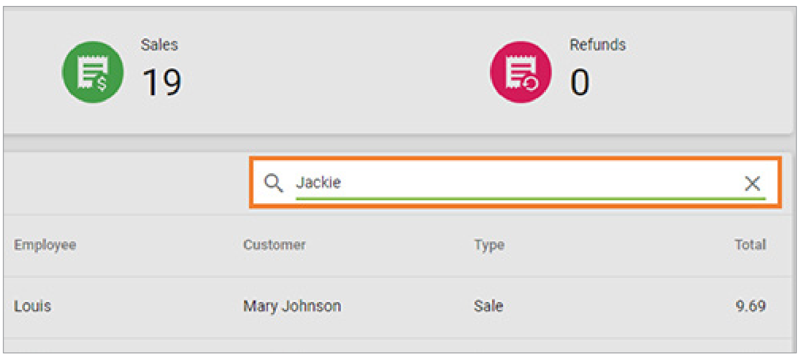
Click on the search icon.

2



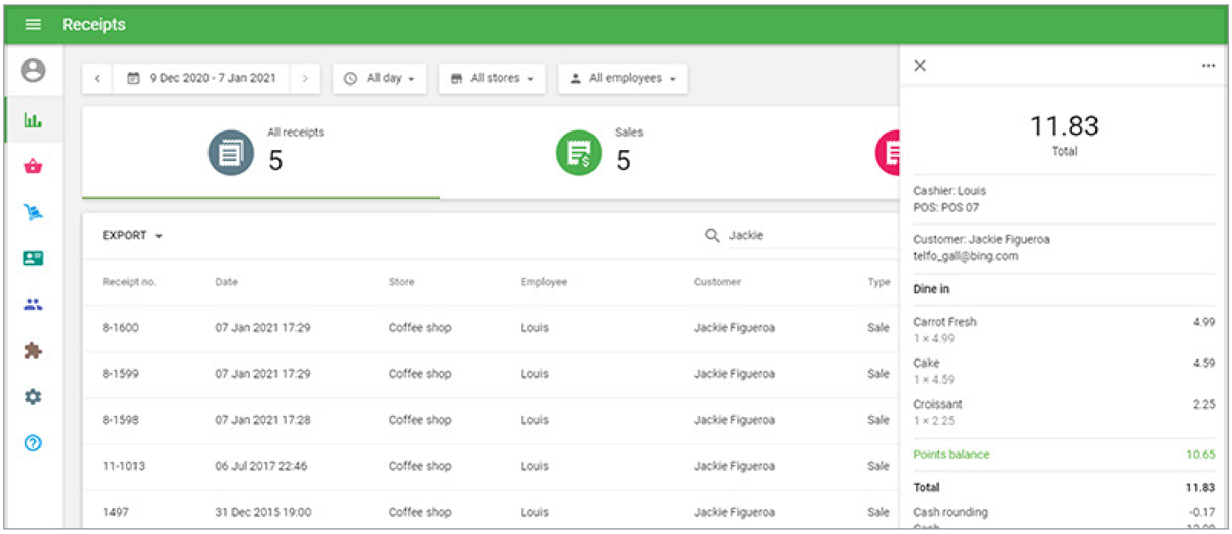
Tap your customer name and click <Enter> on the keyboard.

3



You will see the list of receipts which are connected to the customer.

4

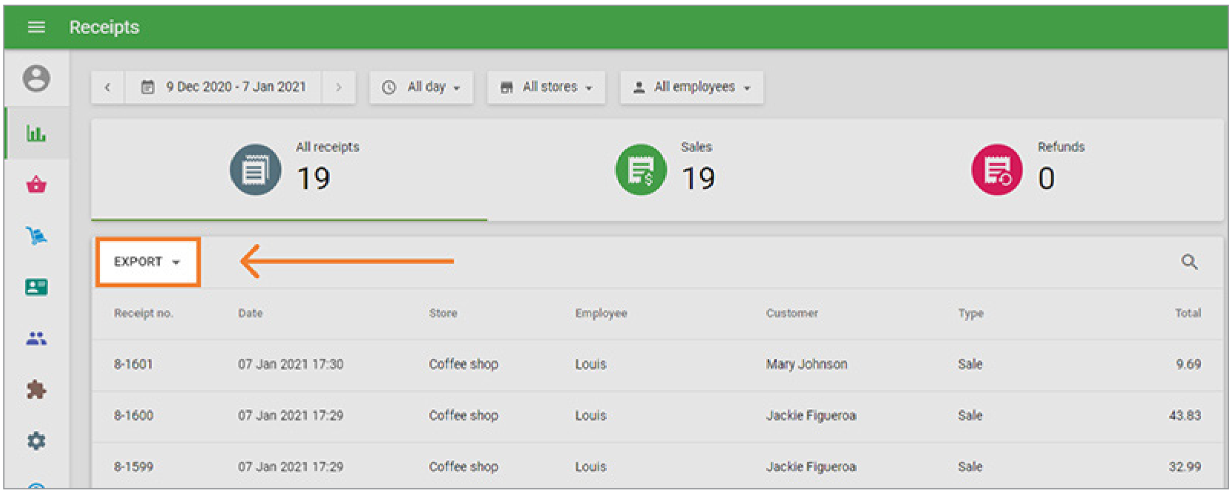


If you click on a receipt row, the details will appear on the right side of the screen.

The other way to see the information about the customer is in the exported 'Receipts' report file. After exporting the report and opening it as a sheet, you can filter the customers.

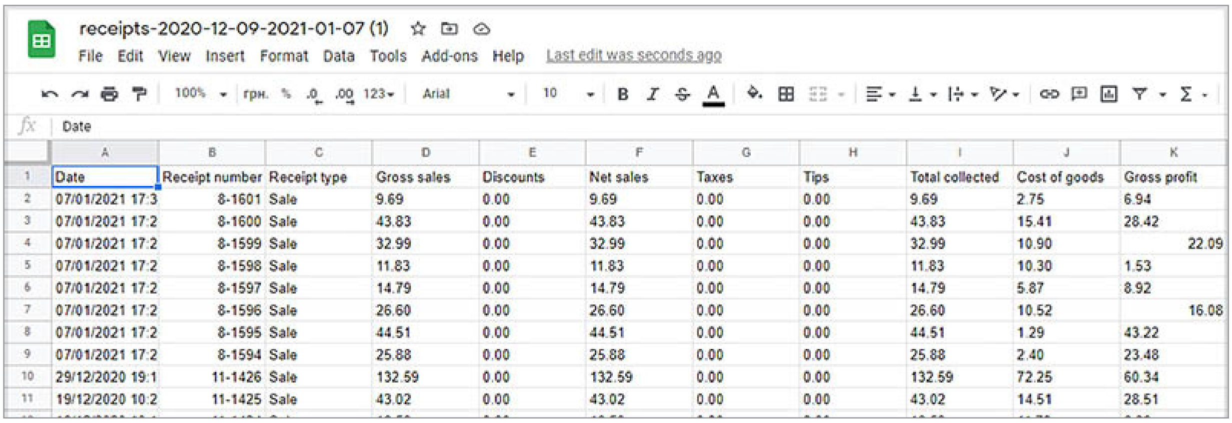
Choose the desired period for the report. Export it as a CSV file by clicking on the 'Export' button.

5



[Open the file in Google Sheets.]

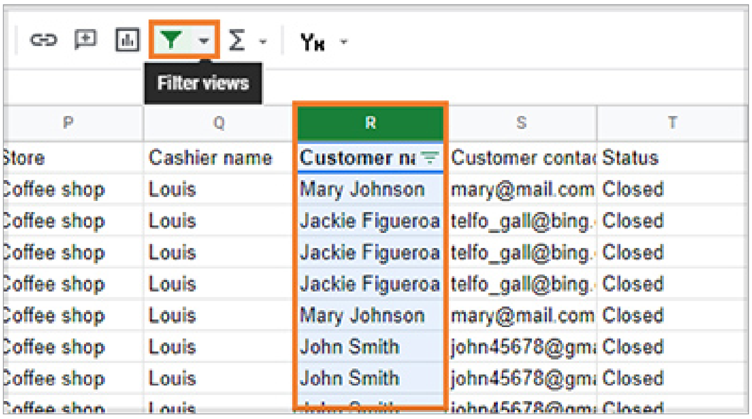
6



Date	Receipt number	Receipt type	Gross sales	Discounts	Net sales	Taxes	Tips	Total collected	Cost of goods	Gross profit
07/01/2021 17:3	8-1601	Sale	9.69	0.00	9.69	0.00	0.00	9.69	2.75	6.94
07/01/2021 17:2	8-1600	Sale	43.83	0.00	43.83	0.00	0.00	43.83	15.41	28.42
07/01/2021 17:2	8-1599	Sale	32.99	0.00	32.99	0.00	0.00	32.99	10.90	22.09
07/01/2021 17:2	8-1598	Sale	11.83	0.00	11.83	0.00	0.00	11.83	10.30	1.53
07/01/2021 17:2	8-1597	Sale	14.79	0.00	14.79	0.00	0.00	14.79	5.87	8.92
07/01/2021 17:2	8-1596	Sale	26.60	0.00	26.60	0.00	0.00	26.60	10.52	16.08
07/01/2021 17:2	8-1595	Sale	44.51	0.00	44.51	0.00	0.00	44.51	1.29	43.22
07/01/2021 17:2	8-1594	Sale	25.88	0.00	25.88	0.00	0.00	25.88	2.40	23.48
29/12/2020 19:1	11-1426	Sale	132.59	0.00	132.59	0.00	0.00	132.59	72.25	60.34
19/12/2020 10:2	11-1425	Sale	43.02	0.00	43.02	0.00	0.00	43.02	14.51	28.51

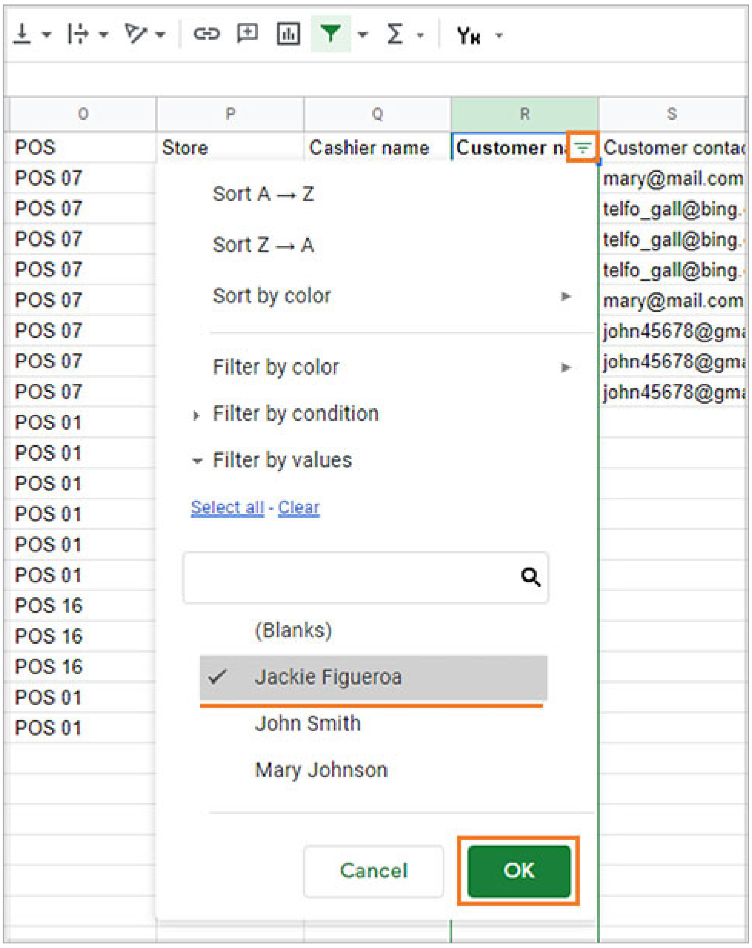
Find and select the column 'Customer name' and apply a filter to it.

7



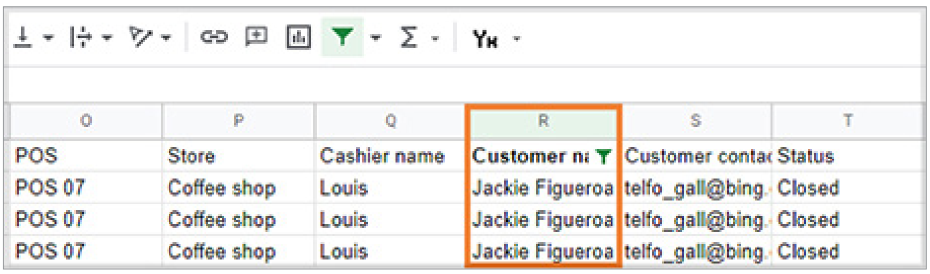
Then, click on the filter icon in the column name and select only the desired customer from the list and apply the filter by clicking the 'OK' button.

8



When the filter is applied, you can see purchases made by that specified customer.

9



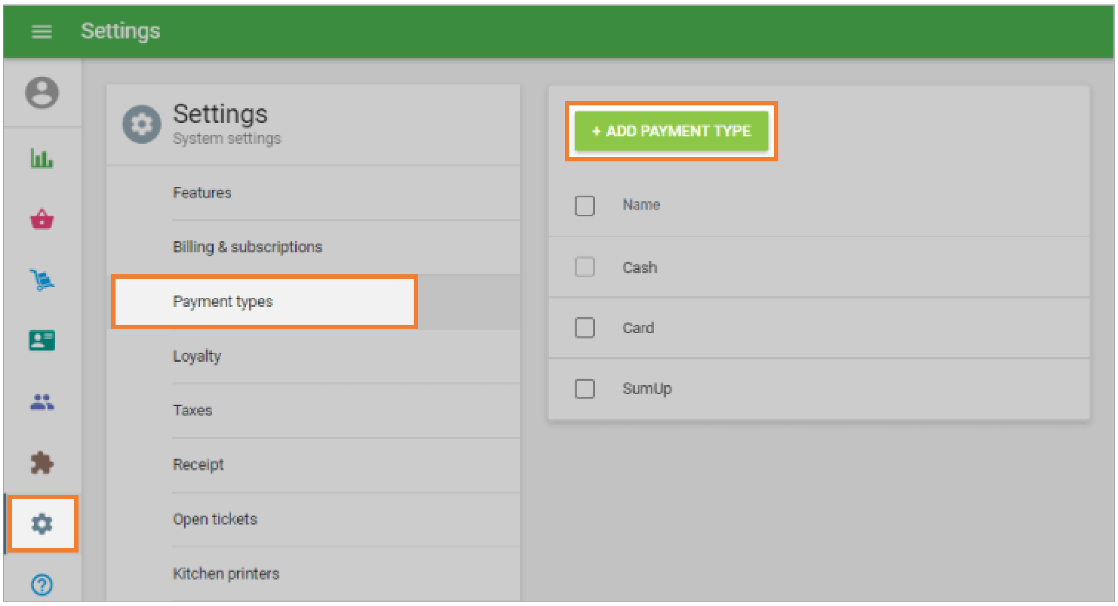
8. Settings

8.1 Configuring Payment Types in Loyverse POS

When you launch Loyverse POS for the first time, it already has default presets for two of the most common types of payment: cash and card. If you accept other methods of payment and want to see a detailed sales report for each payment type, you can easily customize or add other payment types.

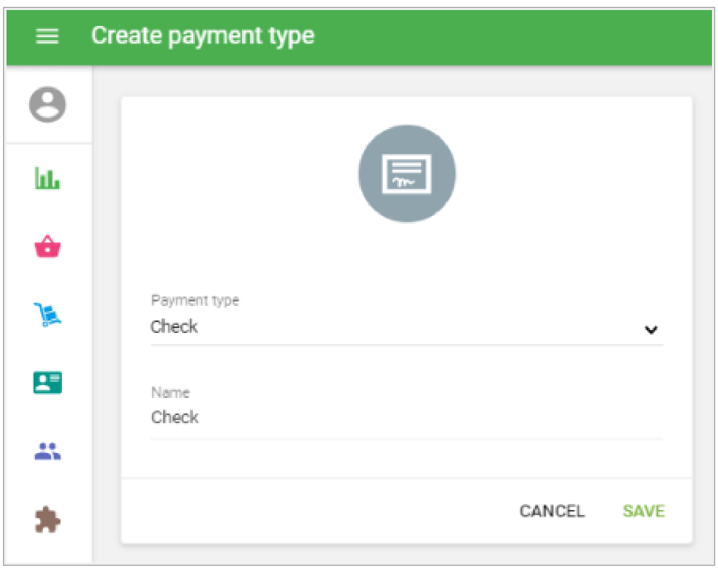
Log in to the Back Office, click the “Settings” menu and then “Payment types”. Click the “Add payment type” button to add a new type of payment.

1



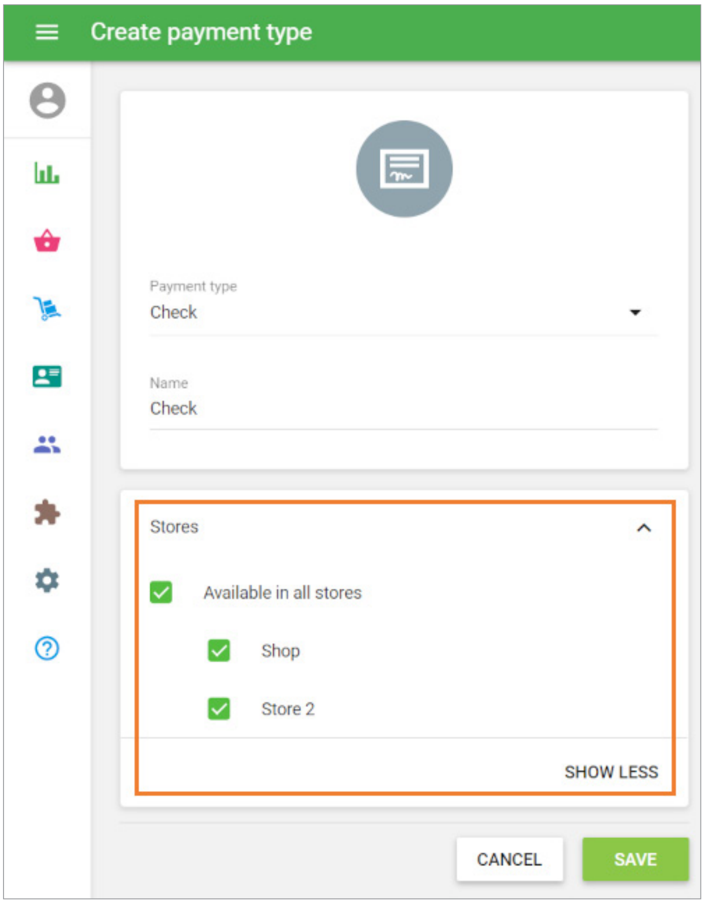
In the Create Payment Type window, select a payment type from the drop-down list. For each payment type you can specify a unique name, which will appear in the report. Cash is the default payment type and cannot be changed. Save your changes when done.

2



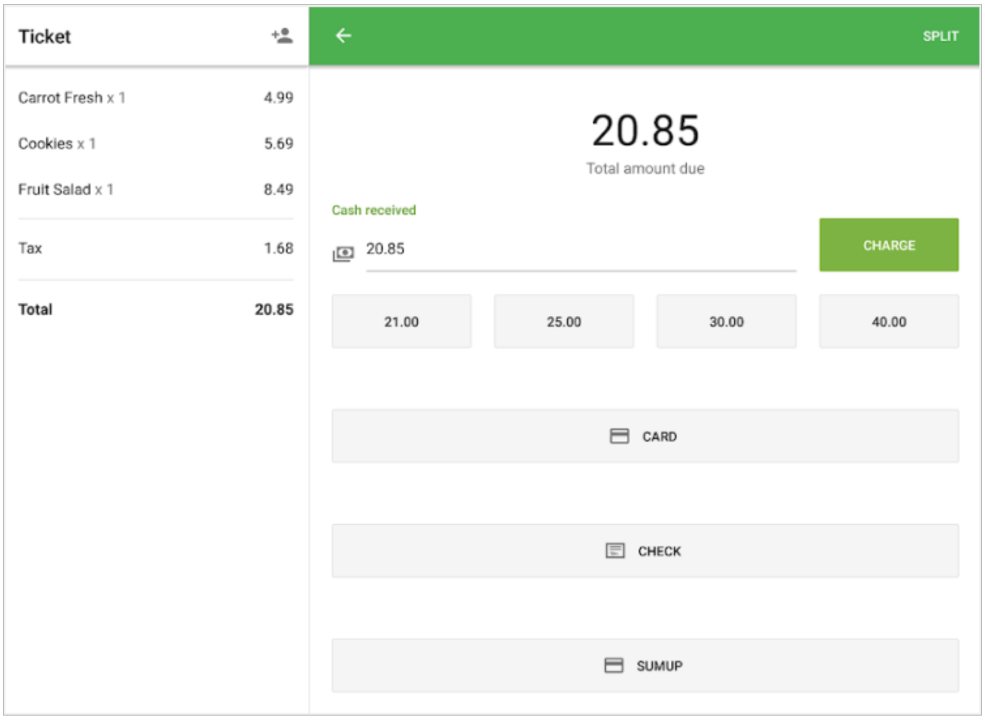
If you have multiple stores, you can manage the availability of each payment type for each store.

3



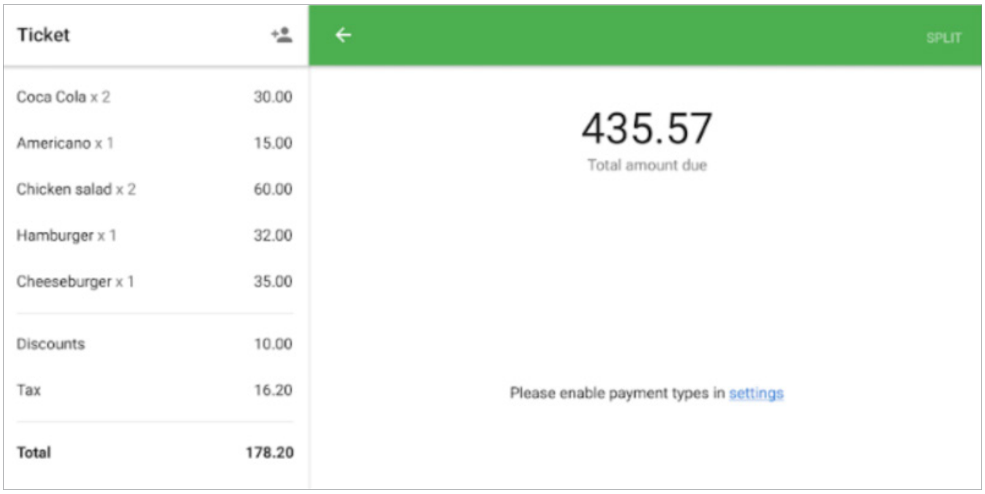
At the final stage of the sale transaction in the Loyverse POS app (Play Market or App Store), you can choose the type of payment.

4



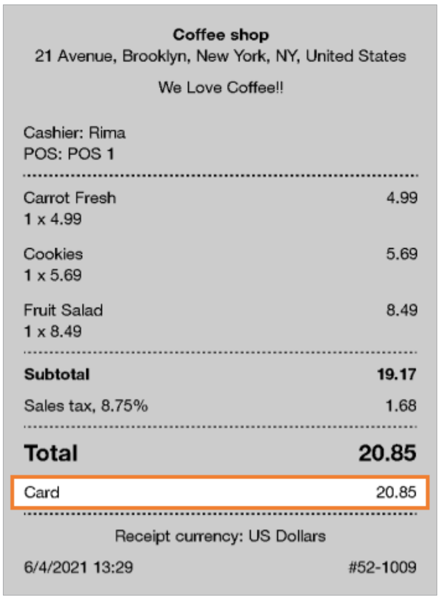
If there are no payment types available for a certain store in the POS, you will see a message with a proposition to enable payment type in Back office settings.

5



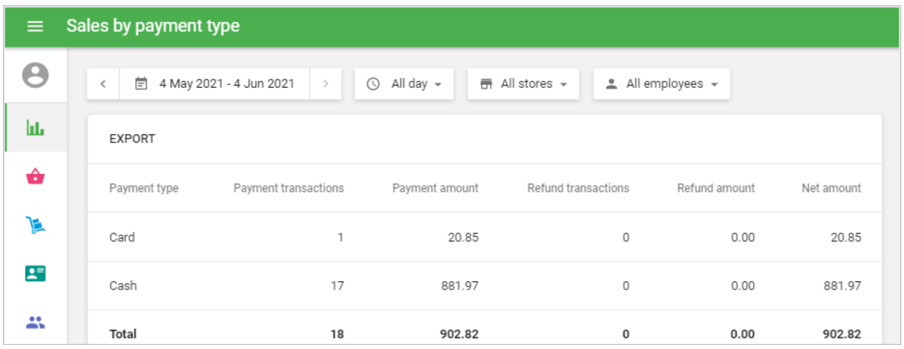
The information about the payment type will be shown on the receipt.

6



Finally, the "Sales by Payment Type" report in the Back Office will show your sales numbers sorted by payment type.

7



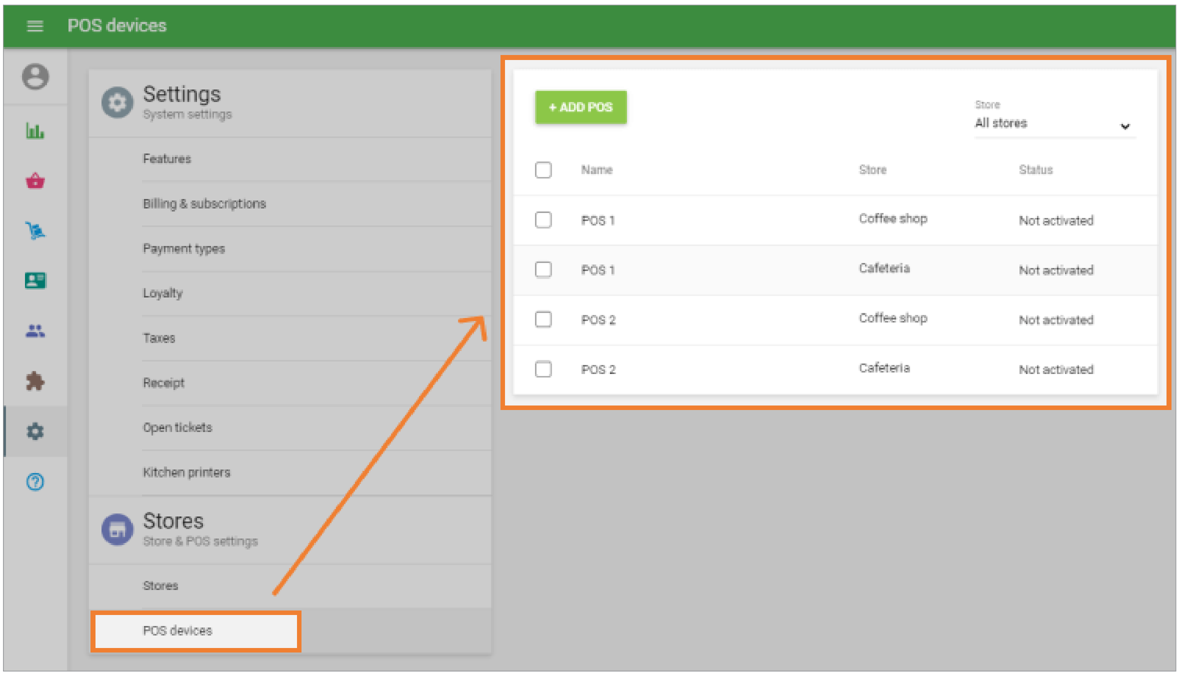
If you delete or rename a payment type, the historical data will not change: you will still see the payment type name as it appeared at the time of purchase in all the receipts that were synchronized before the change.

8.2 How to Create, Activate and Delete POS

8.2.1 How to Create new POS

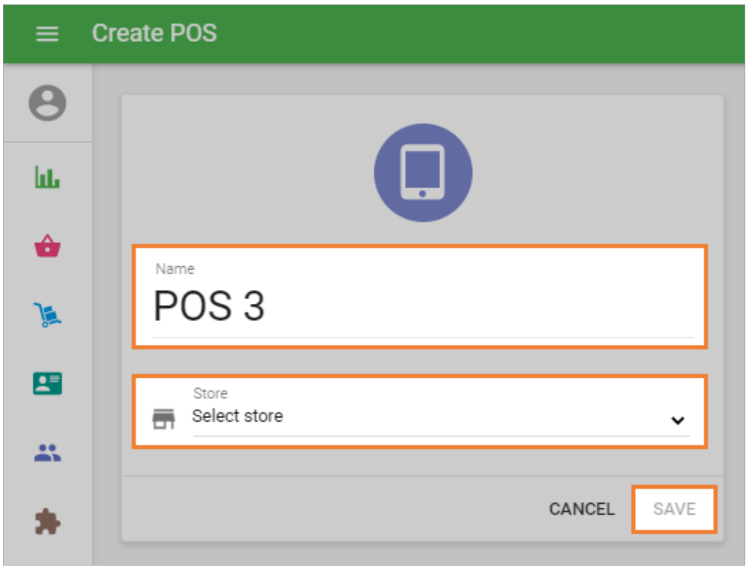
At the Back Office you can add a new POS in the 'POS devices' section.

1



In the ‘Create POS’ form insert the Field Name and select the Store where it will work. Don't forget to click on the ‘Save’ button.

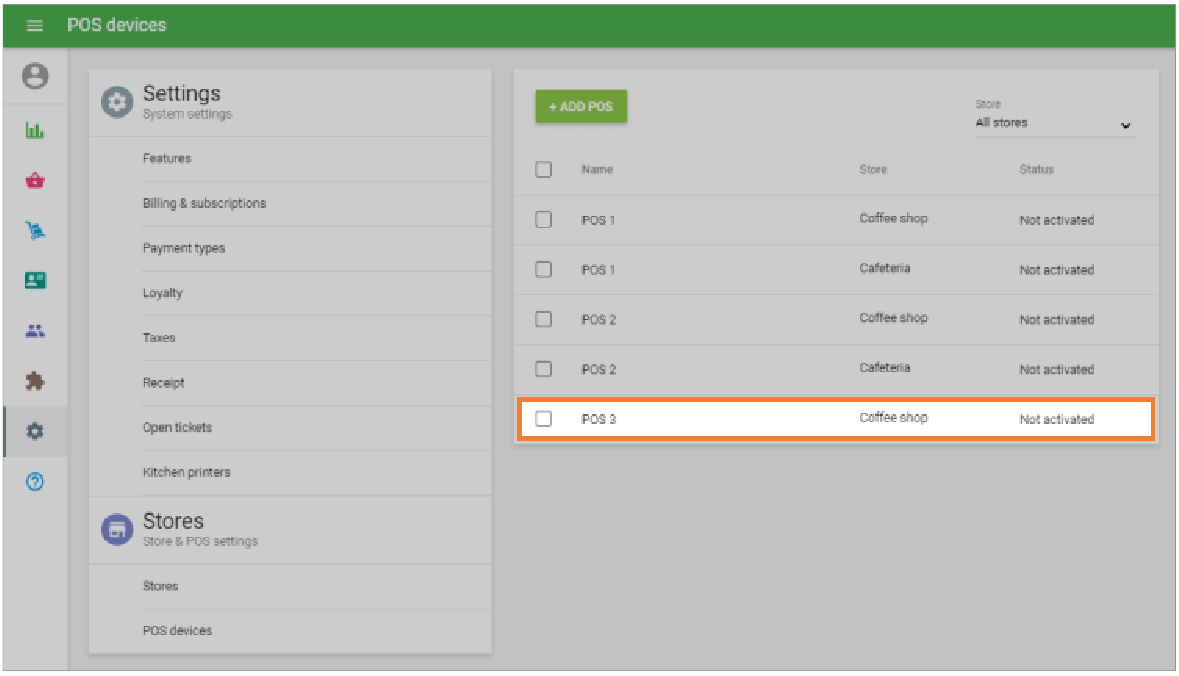
2



8.2.2 How to Activate POS

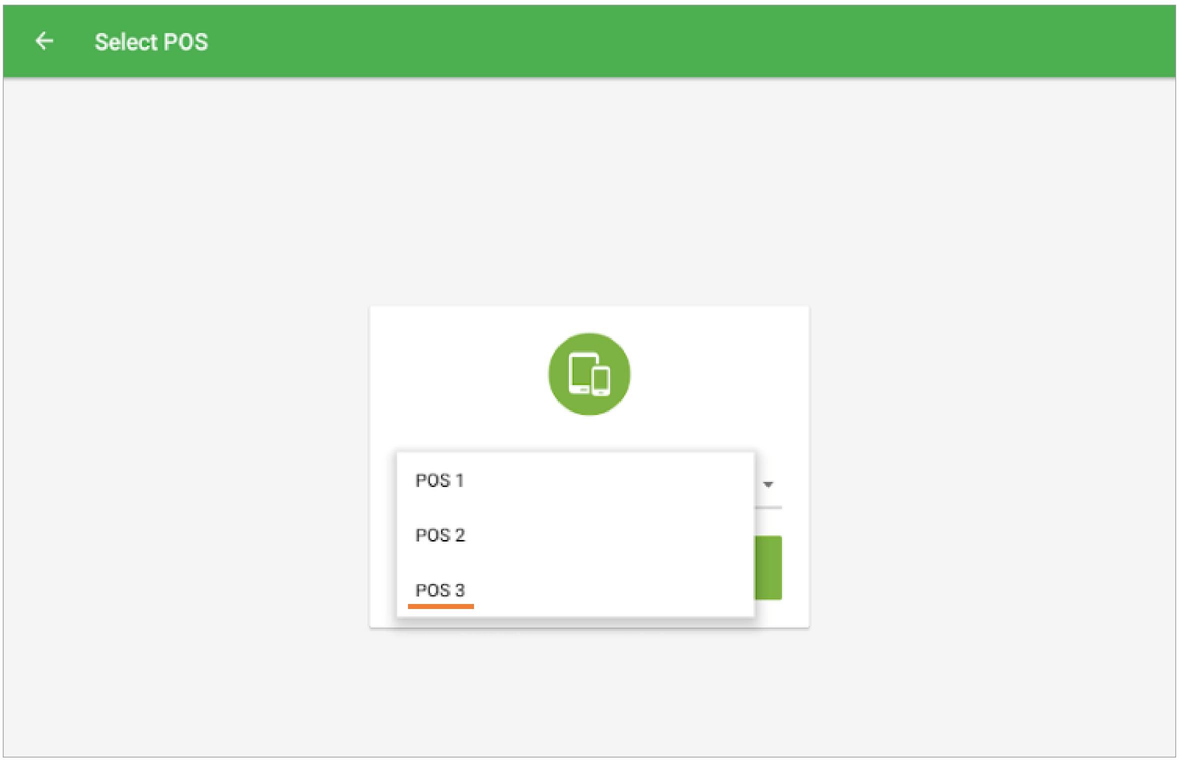
After you create a new POS at the Back Office, it will appear at the list of your POS devices, with the status ‘Not Activated’.

1



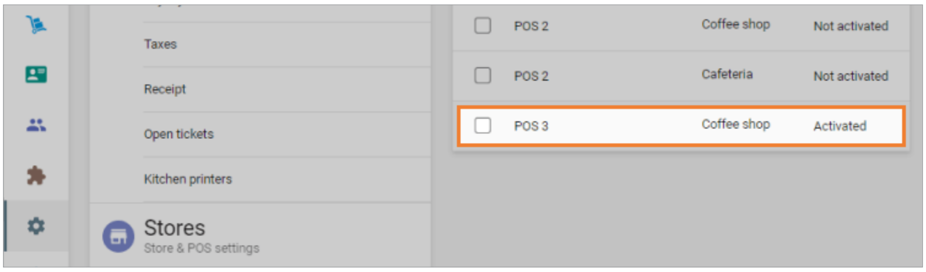
To activate it you have to login to your new POS on your mobile device with the E-mail and password of the store owner. After that the owner can switch the user account to a different employee.

2



Afterwards, in your Back Office, the new POS will change its status to Activated.

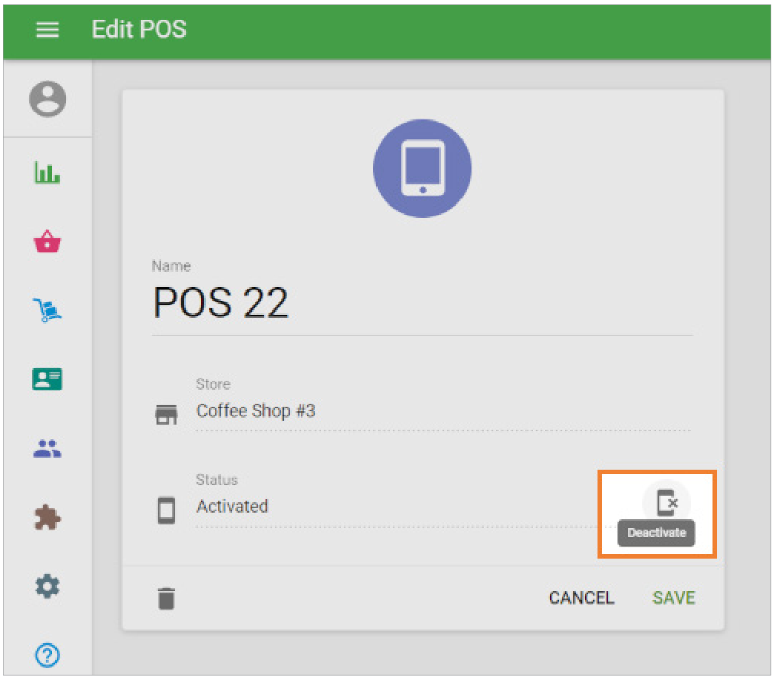
3



8.2.3 How to Deactivate POS

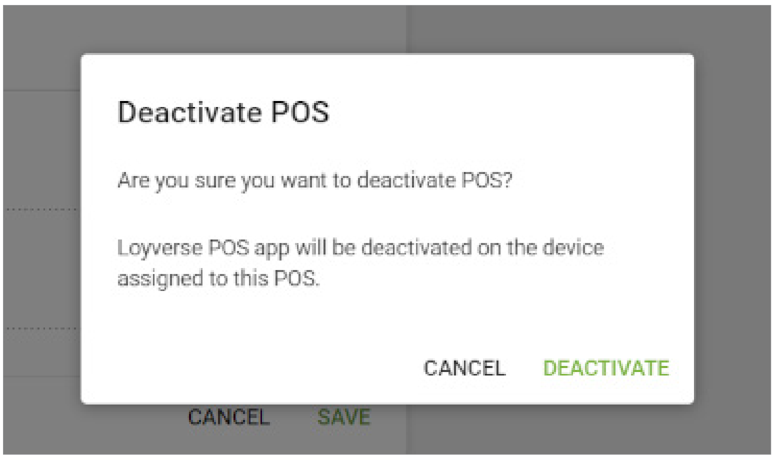
Such a situation may occur when the mobile device with the Loyverse POS app is lost or broken. Deactivation means disconnecting the Loyverse POS app on the device from the Loyverse account and back office.

1



Confirm your intention by clicking on the ‘Deactivate’ button in the dialog window.

2

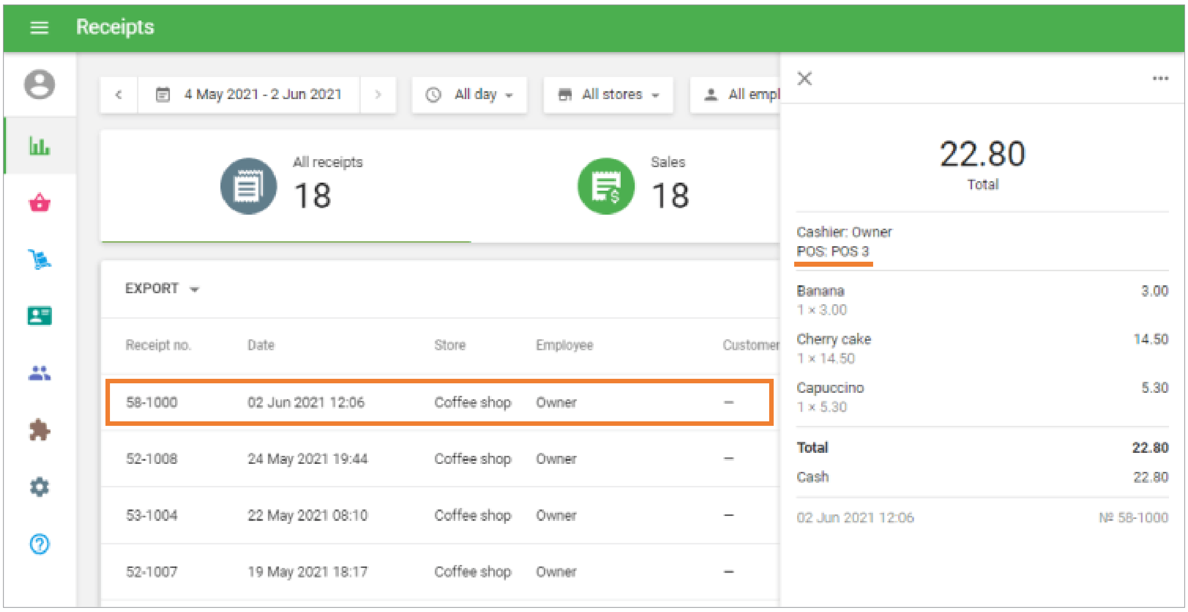


After that, the status of the POS will be changed to ‘Not Activated’ and you can log in to this POS on a new device.

8.2.4 How to delete POS

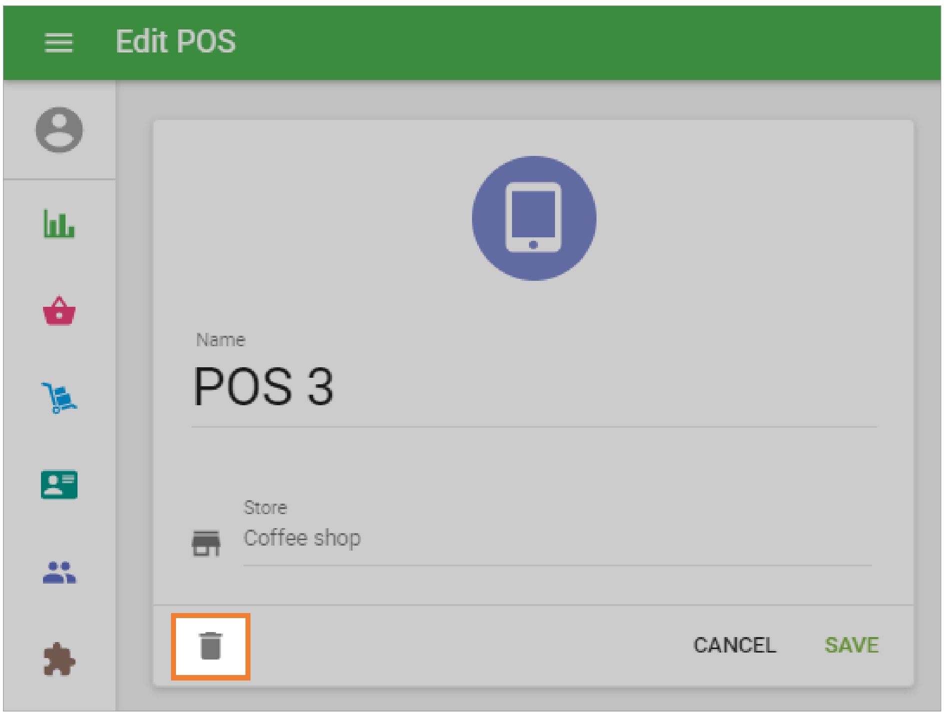
Important! Before deleting your POS from the Back Office: close all open tickets and close shift in your POS on the Mobile device.
Also make sure that all sale records made on the Mobile device have been synchronized with the Back Office. To do this, at the Back Office, open your 'Receipts' list and check your receipts. Click on the receipt and after it opens at the right check the POS name. If you have any missing receipts, connect your mobile device to the Internet and all data from your POS will be synchronized with the Back Office.

1



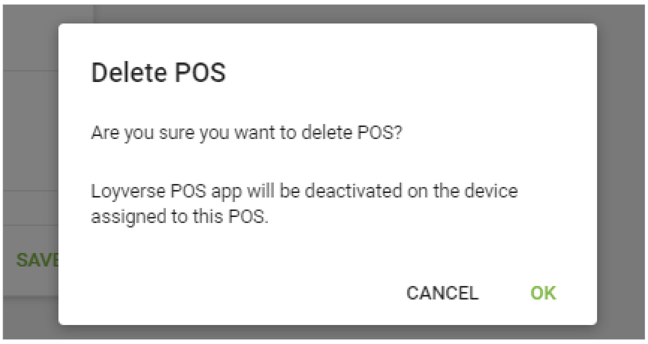
To delete POS find it in the 'POS devices' list, enter it for editing and click the trash icon.

2



In the pop up window, confirm your intentions by clicking on 'OK' button.

3



After you delete your POS at the back office, you will still have all of the receipts created on this POS, if they were synchronized before the deletion. However, this POS will be deactivated on the device.

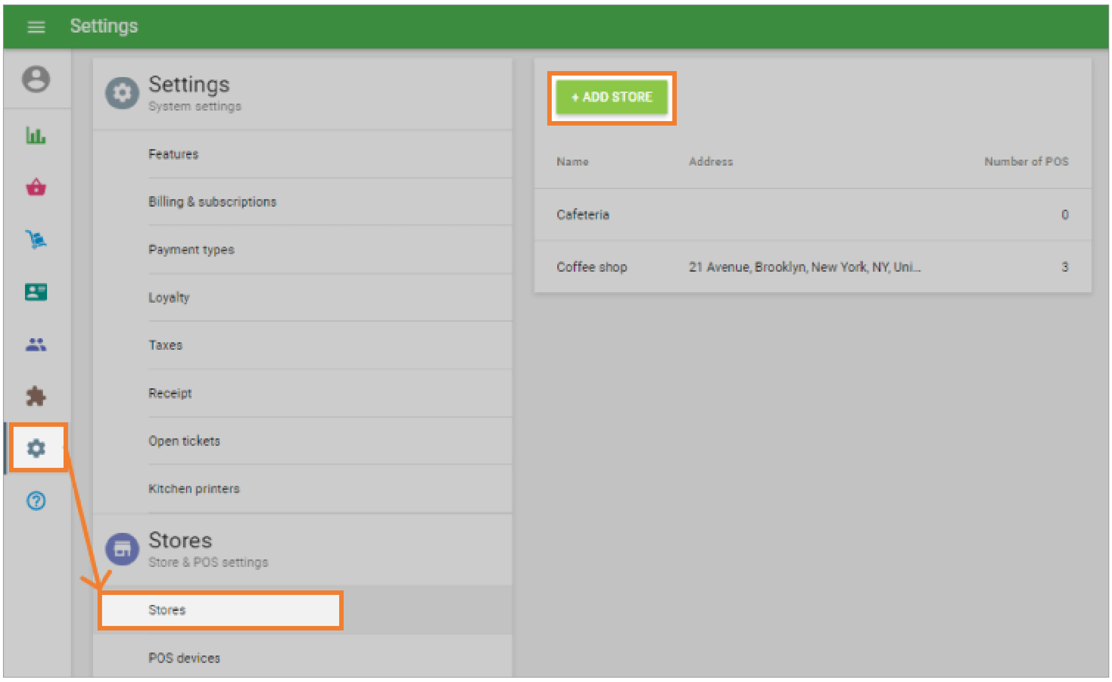
8.3 How to Create and Manage Multiple Stores under One Account

With Loyverse POS you can manage multiple stores under one account. Track your sales, inventory, employees, and customers — everything you need to know in one place.

8.3.1 Adding a new store

To add a new store in the Back Office, go to Settings and click on the 'Stores' button. Click on the 'Add Store' button to create a new store. Fill in the information about the new store and save.

1

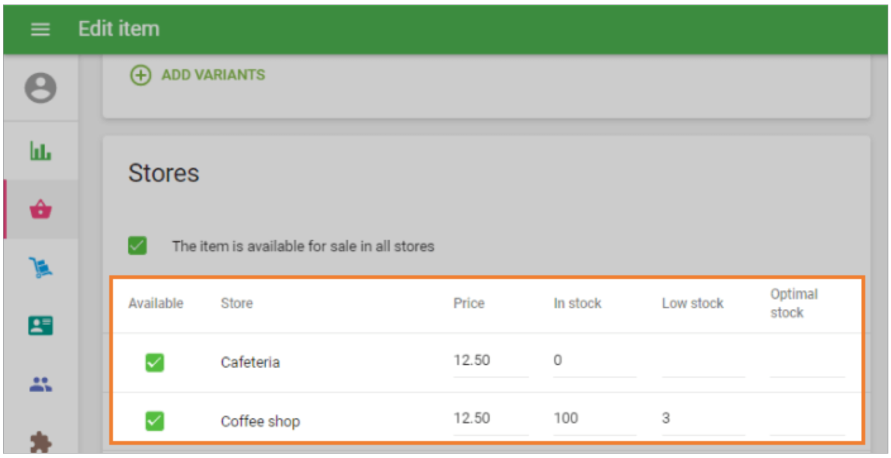


After that, your store appears at the store list, and you can create and assign a new POS device for this store.

8.3.2 Items management

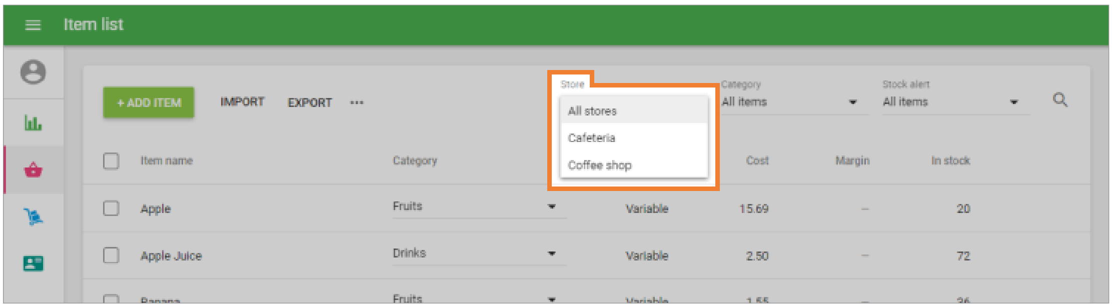
You can manage the item parameters for each store. Open your item for editing, find the 'Stores' section, and change the price, in-stock quantity, and low-stock notification.

1



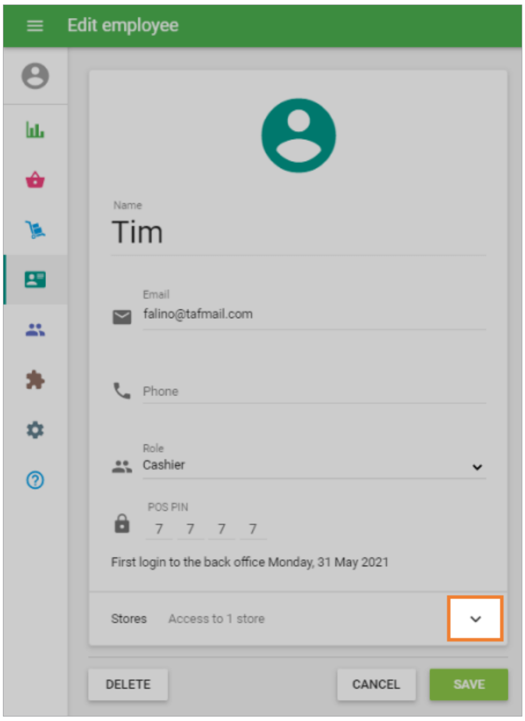
At the item list, if you select a store filter, you will see the items available in this store and also the ingredients that belong to composite items, available in the selected store. The item list also shows the actual price and in stock values for the selected store.

2



8.3.3 Employee management

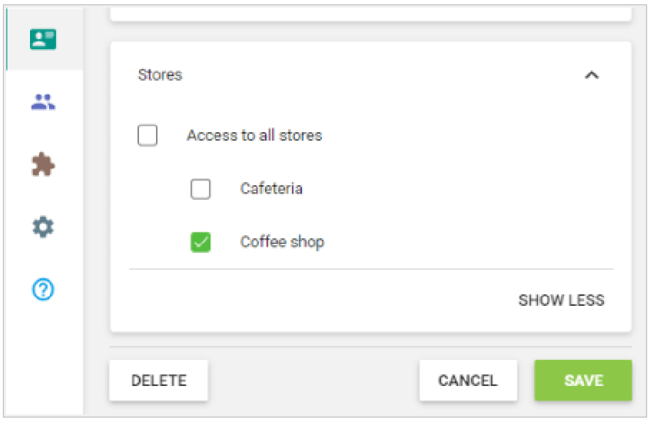
1



You can manage your employee access to your stores. For this, go to the 'Employee list' and choose one for editing. At the bottom of the form, find the 'Stores' line and click on the down arrow.

Afterward, an additional window will slide down with the list of your stores. You can assign your employee to a particular store.

2

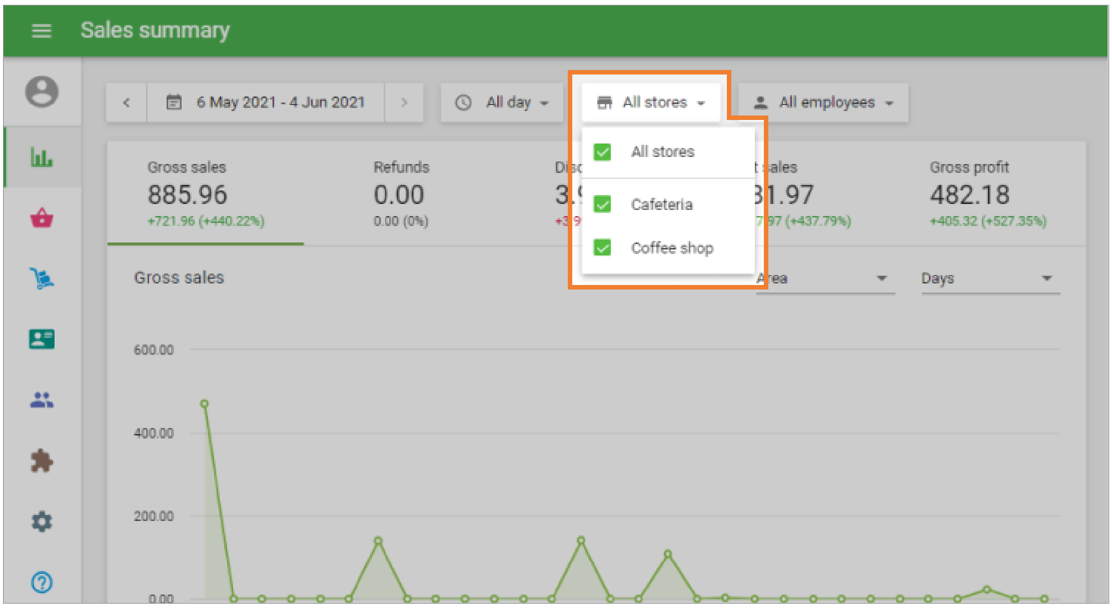


Don't forget to save changes.

8.3.4 Sales reports

In the Back office, you can see all of your sales reports by selecting a filter for all or selected stores.

1



8.3.5 Customers

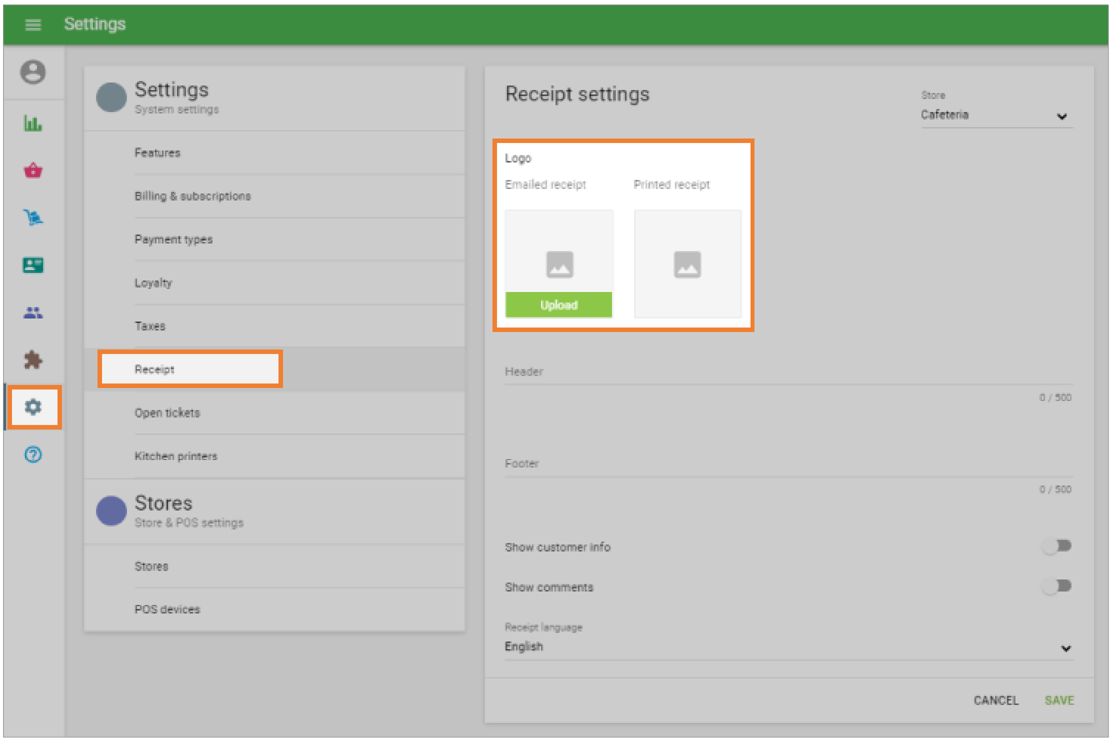
You can easily manage your clients at the Back office in a single list, across all of your stores for the loyalty program.
Customers are visible, and customer points are available for redemption in all of your stores.

8.4 How to Add Logo to the Receipts

Enter the Back Office. Click on ‘Settings’, then go to the ‘Receipts’ section.

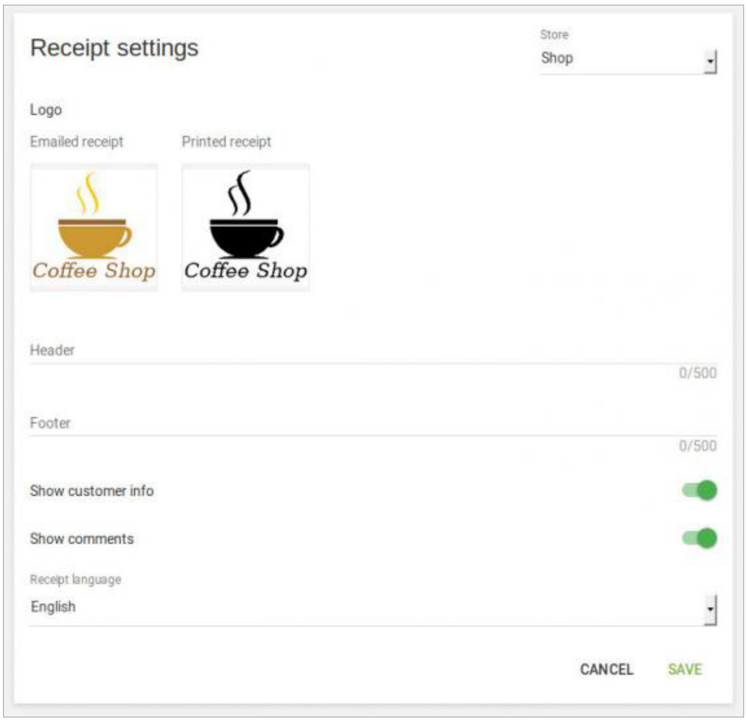
There are two fields for entering a logo. For the logo, which will appear on the emailed receipt, it is better to use a color image. Upload the digital logo by selecting an image file from your computer.

1



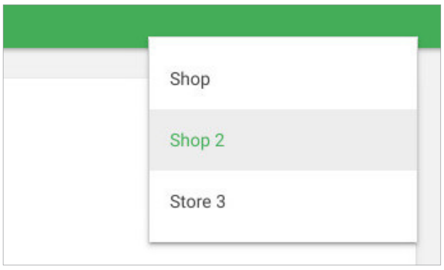
Logo for ‘Printed receipt’ should be a black and white image. If you upload the color logo, the system will generate a black and white picture from it.

2



If you have several stores, select the other stores from the drop-down list at the top right-hand corner and upload the logos for each store in the same way.

3



Don't forget to save your changes.

Now your printed logo will appear on the printed receipts as shown below:

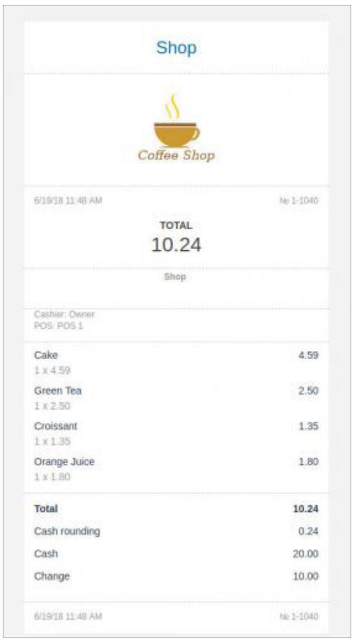
4

Note

Logo will not be printed on receipts and bills if the *Text mode* is selected in *Advanced* printer settings.

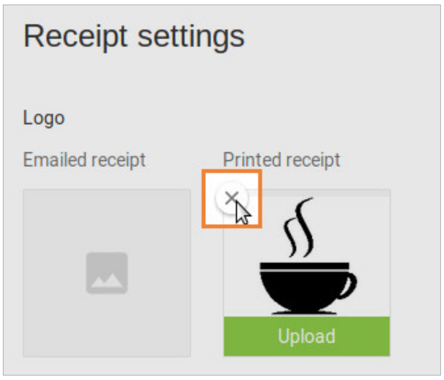
The logo for Emailed receipt will appear on e-receipts.

5



If you don't want your logo to appear on the printed or emailed receipt, you can delete it in the Back Office for the selected store.

6



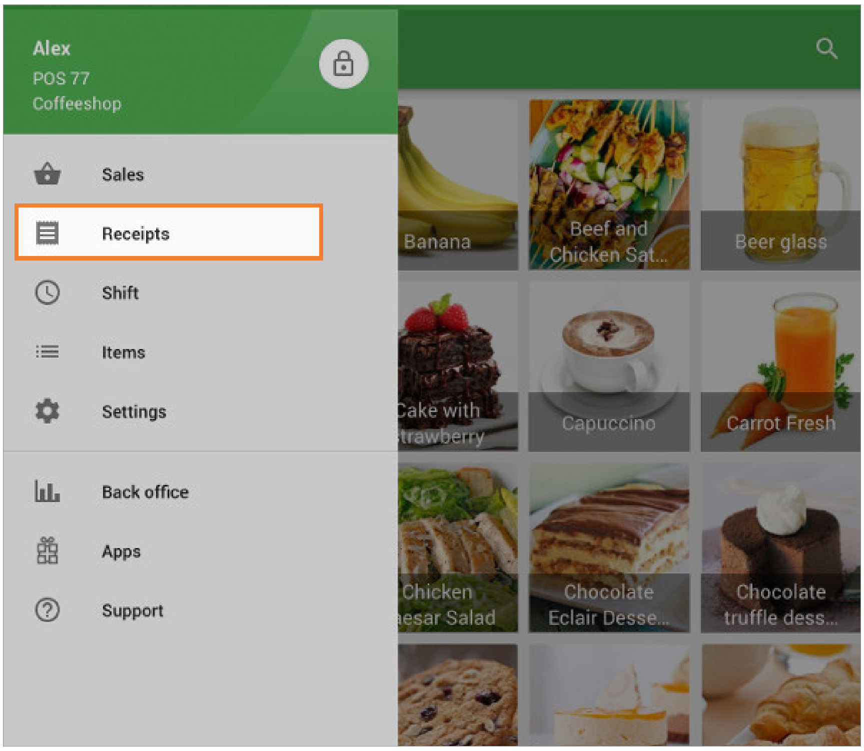
8.5 How to Sign out from Loyverse POS

Note

Note! If you make sales and sign out while your device has been disconnected from the Internet (offline mode), you can lose your receipts.
So, before signing out from Loyverse POS, make sure that all your receipts have been transferred to the Back Office.

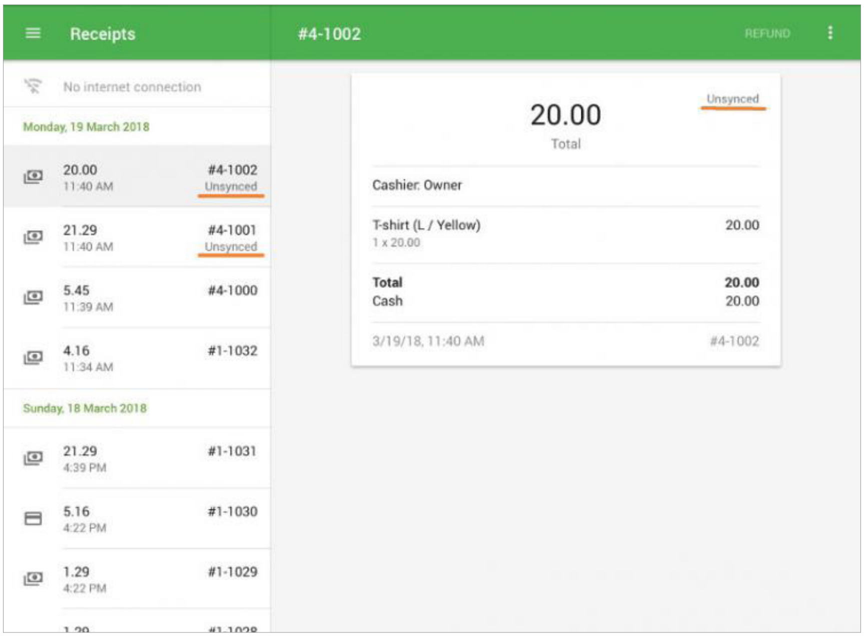
To do this, go to the 'Receipts' section.

1



If you see some receipts that are non-synchronized (sales that are made during the time when there was no Internet connection) and marked 'Unsynced', do not log out. Otherwise, your unsynced receipts will be lost.

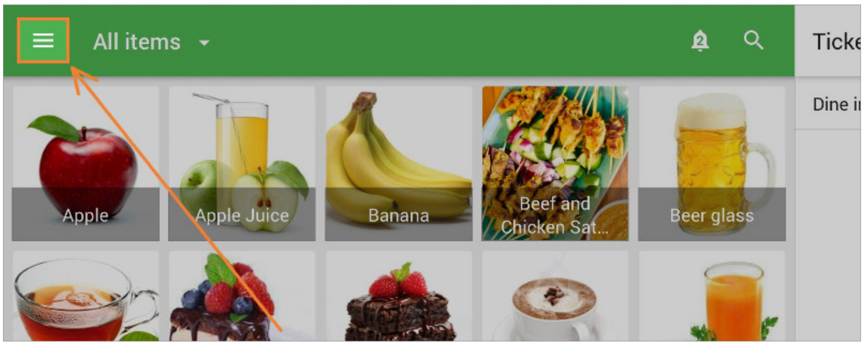
2



Try to restore the Internet connection and get the list of all receipts synced.

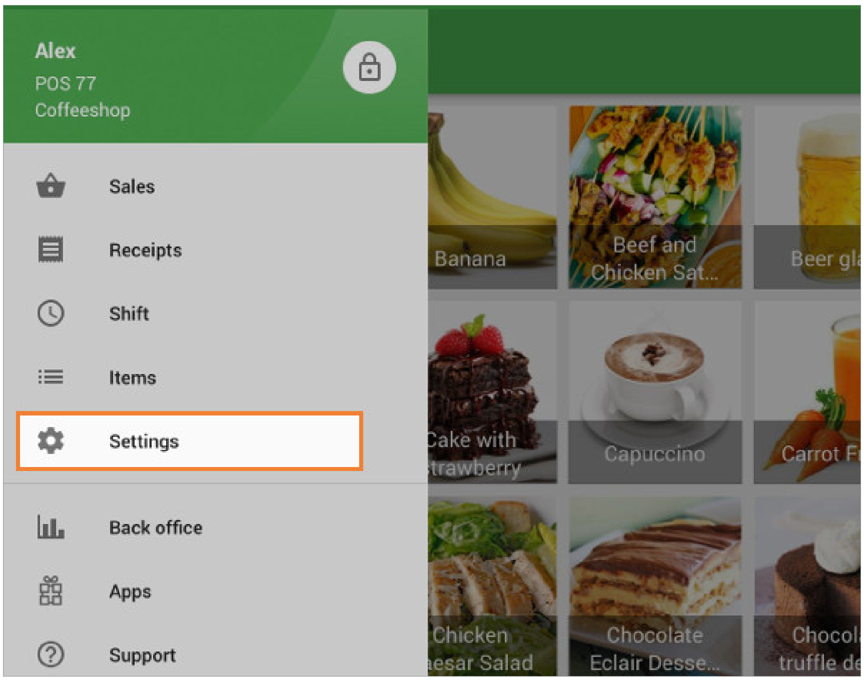
To sign out from your account, go to Menu.

3



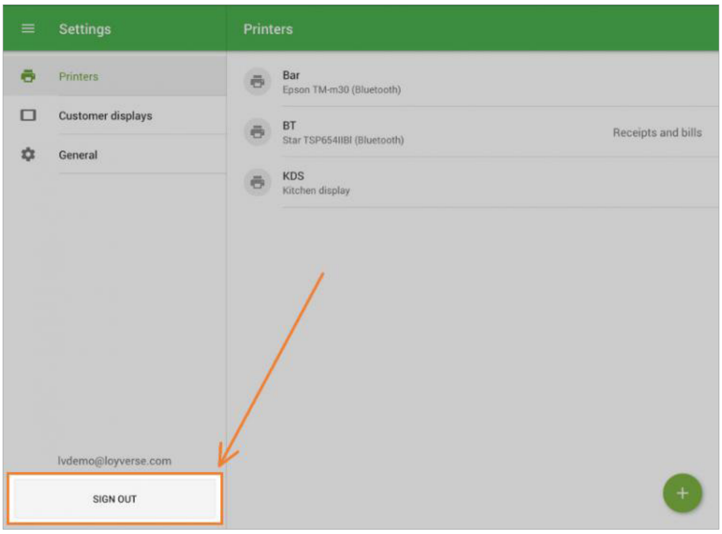
Select ‘Settings’.

4



Click ‘Sign out’ button.

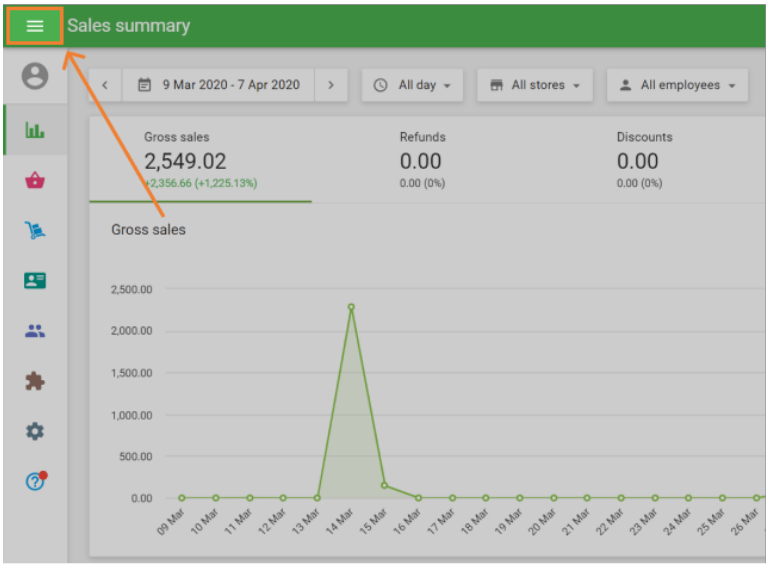
5



8.6 How to Exit from Back Office

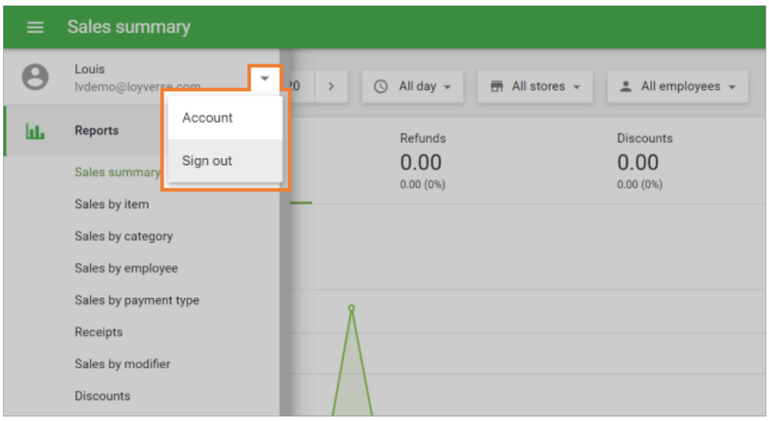
For sign out from your account in Back office, go to menu.

1



By clicking on account email you will see drop down botton ‘Sign out’. Click on it.

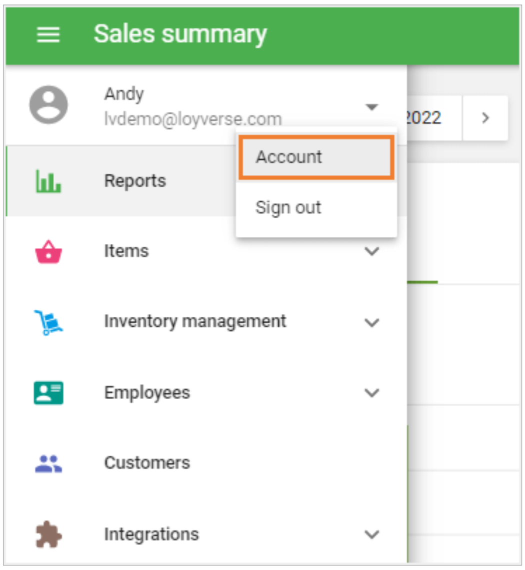
2



8.7 How to Set the Currency

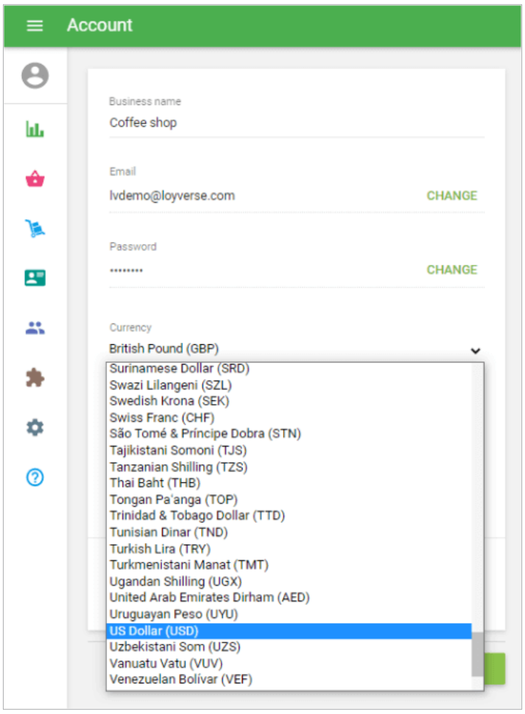
By default, the system sets the currency of the account depending on the country of registration. The owner of the account can change it.
Click on the 'Account' button in the Back Office's main menu.

1



Select the needed currency in the 'Currency' field.

2



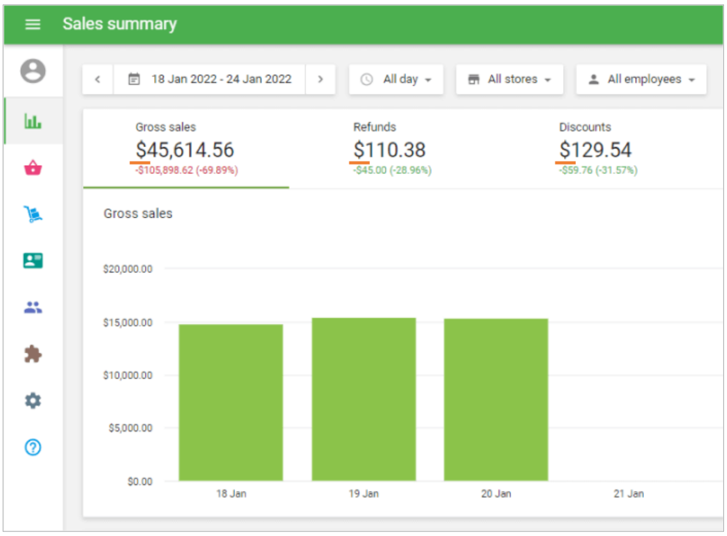
Do not forget to save changes.

Note

The changing of the currency will also set the corresponding currency format (with decimals or without decimals and form of decimal separator) for the account.

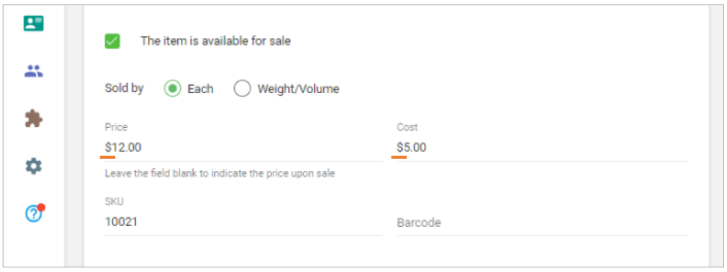
Now you can see the currency symbol or name in the Reports sections of the Back office.

3



And also in the price and cost fields in the Back office.

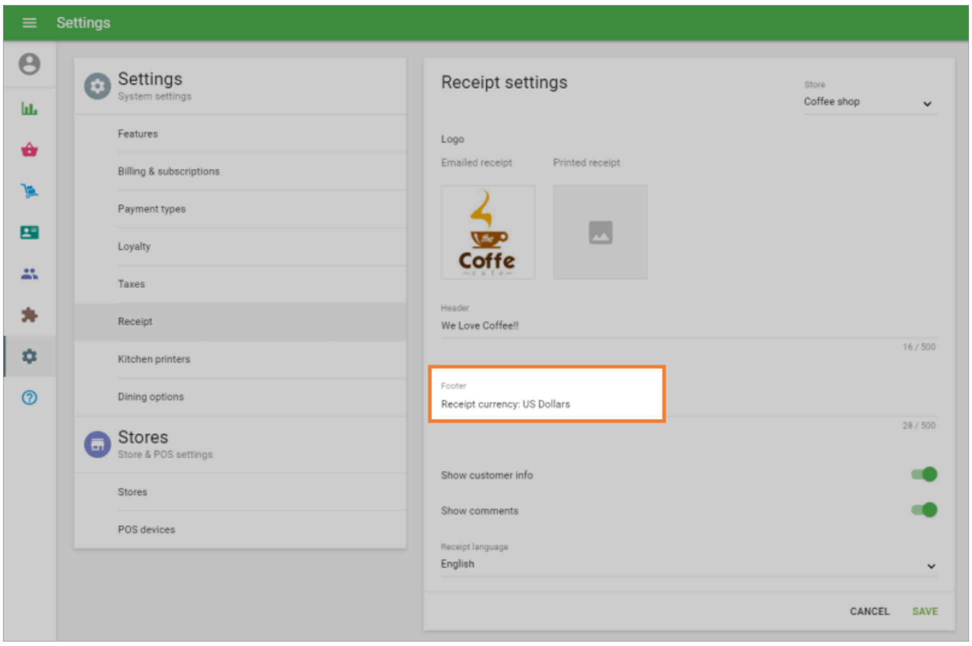
4



All the amounts and prices on the receipt are not specified by any currency, just by a number. However, for paper receipts you can change the settings to add text (your desired currency) at the end of the receipt.

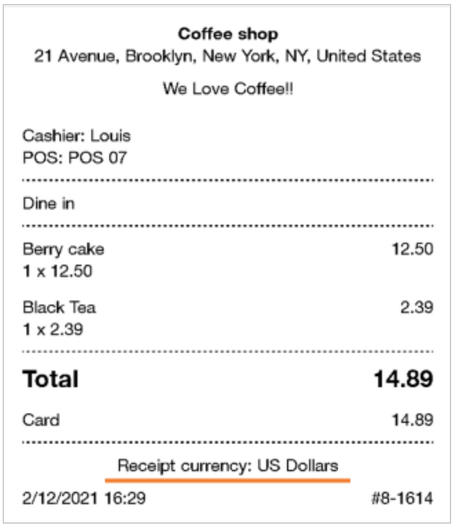
In your Back Office go to 'Settings' and choose 'Receipt' menu. In the 'Footer' field, specify your currency.

5



The message will appear on each receipt as shown below.

6



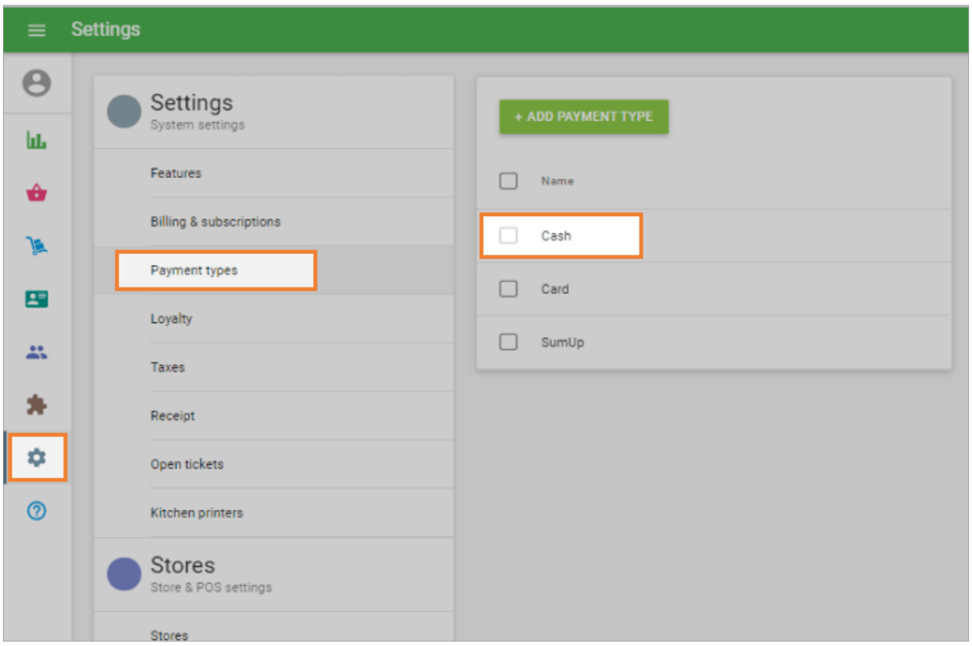
8.8 How to Work with Cash Rounding

When the cash rounding is applied, the amount payable for a cash transaction is rounded to the nearest rounding interval with specified rounding rule, whereas transactions paid in other ways are not rounded.

Cash rounding can be used in countries where coins are withdrawn from circulation. Also in some countries, rounding is allowed at the discretion of the merchant (for example, if the merchant wants to reduce the amount of small change in revenue). Rounding does not affect the amount of taxes.

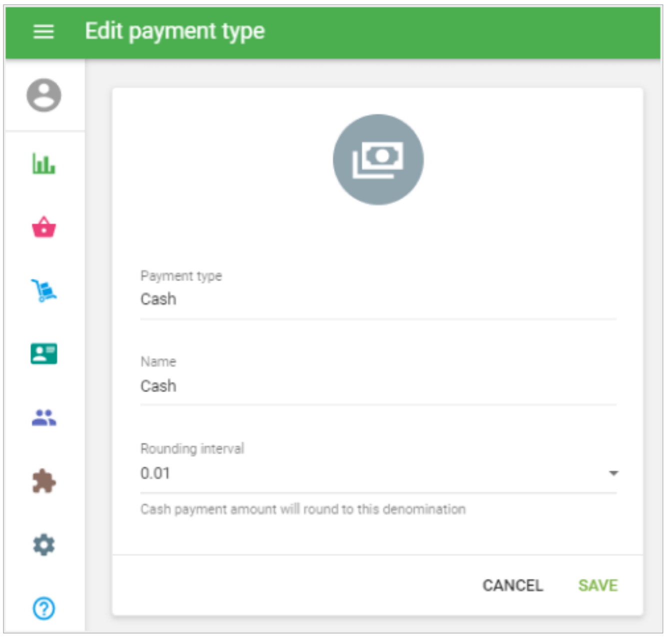
Log in to the Back Office, click the Settings menu and then Payment types. Click the Cash type of payment.

1



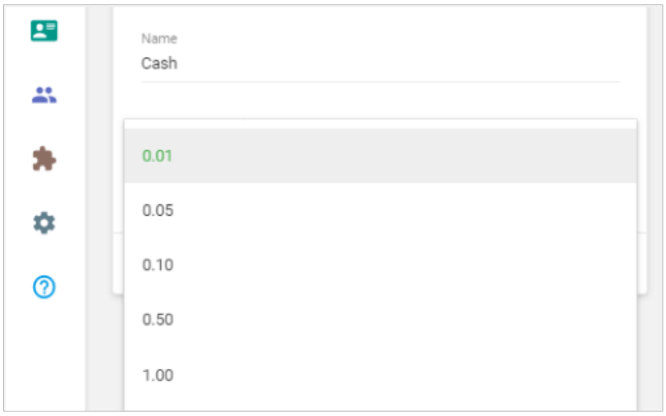
The form 'Edit payment type' will open for editing.

2



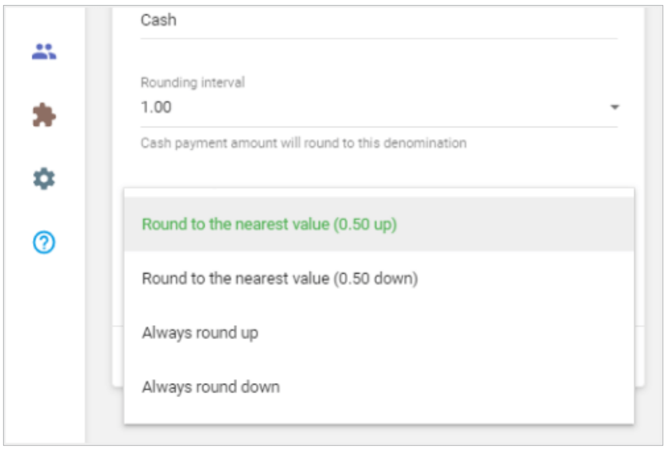
You can select the rounding interval from the drop-down list. For countries with decimal currency: 0.01, 0.05, 0.10, 0.50, 1.00 . For countries without decimals: 1, 5, 10, 50, 100.

3



If you set a value other than the default value of 0.01 (or 1 for countries without decimals), you can select the 'Rounding rule' from the drop-down list. In other words, you cannot select a rounding rule if you select a rounding interval of 0.01 or 1.

4

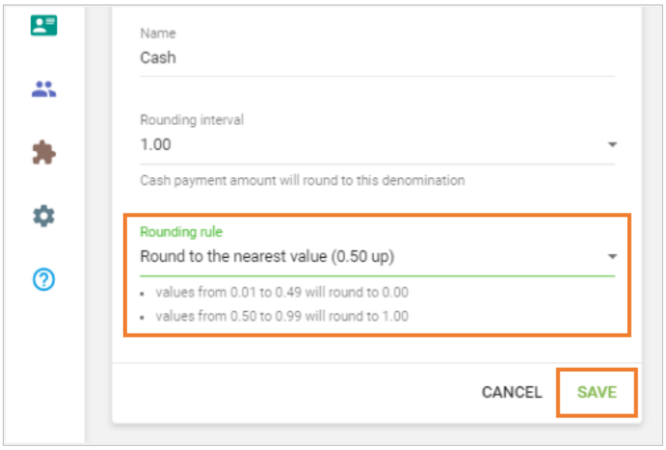


By default, the rule 'Round to the nearest value (average value up)' is selected, but you can also choose:

- Round to the nearest value (average value down)
- Always round up
- Always round down

You will see the explanation of how the selected rounding rule works.

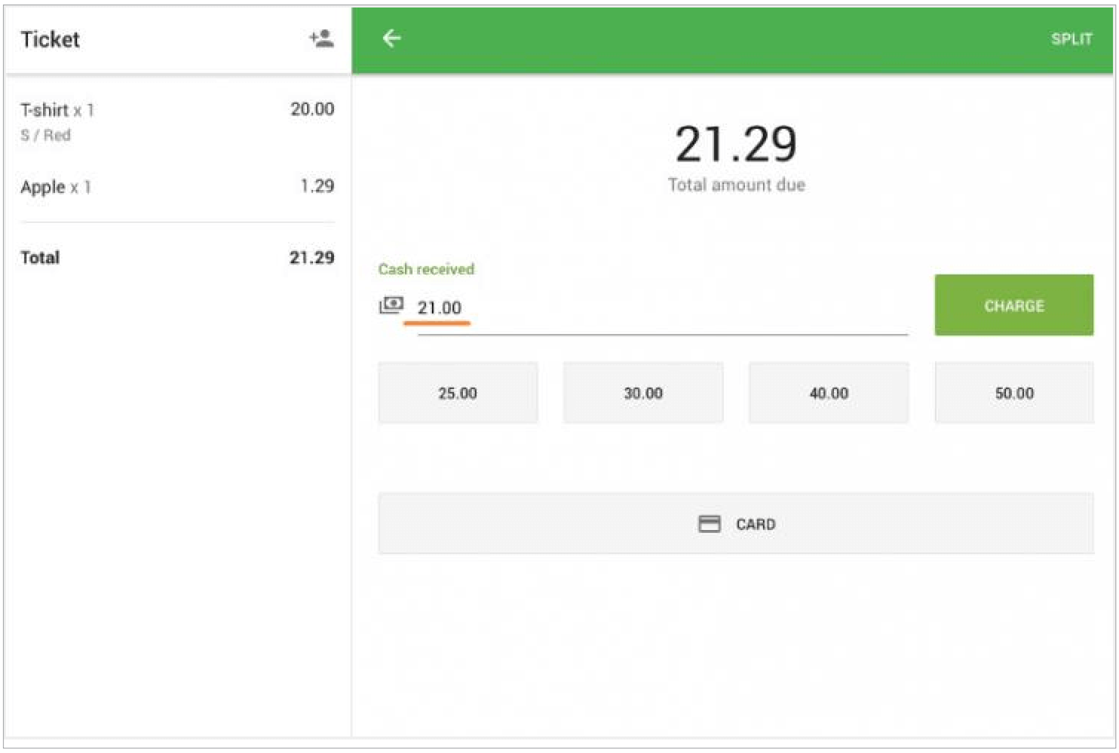
5



Don't forget to save the setting.

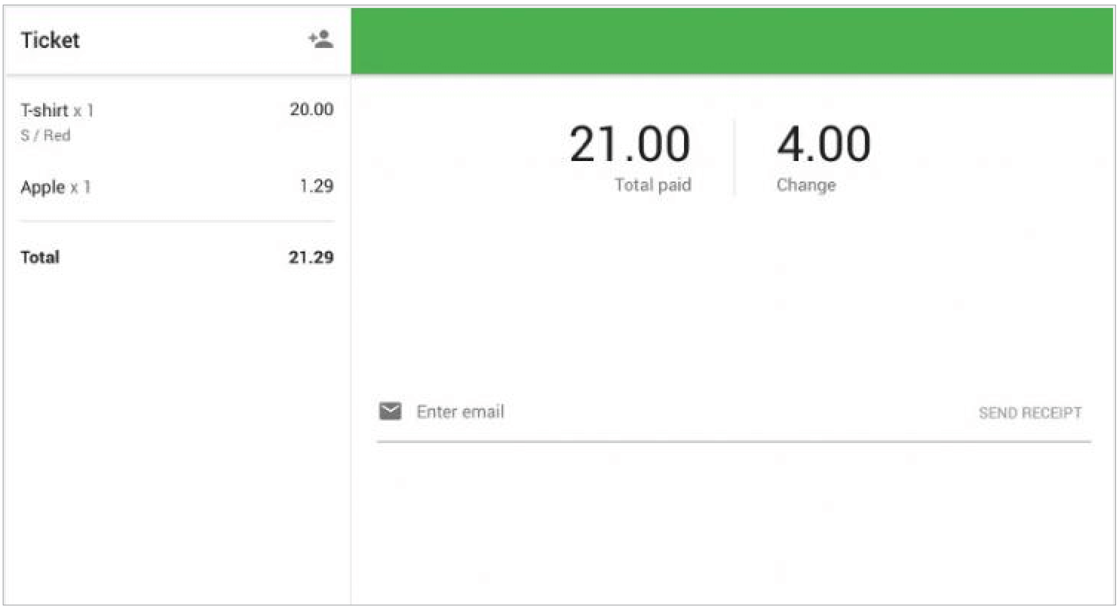
Now during the sale at the POS, you can see the rounded amount in the 'Cash received' field.

6



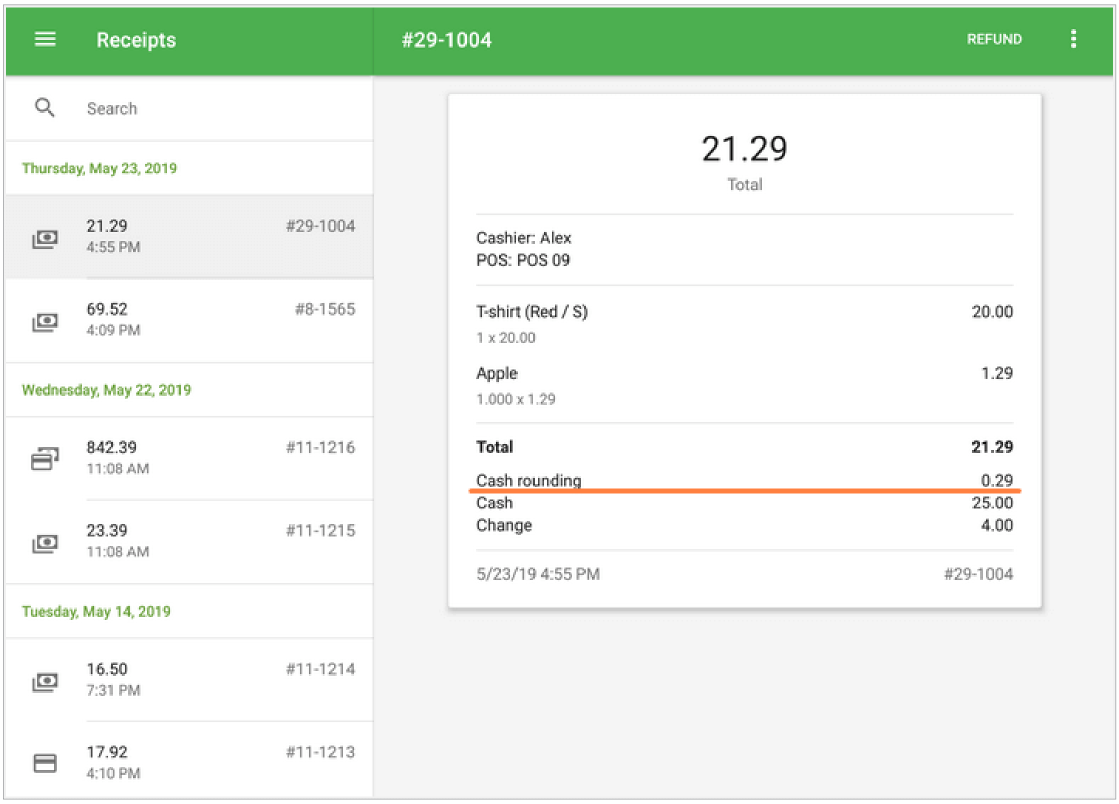
If you enter the value of the received amount of cash and tap 'Charge', you will see the change in the next screen with the consideration of rounding.

7



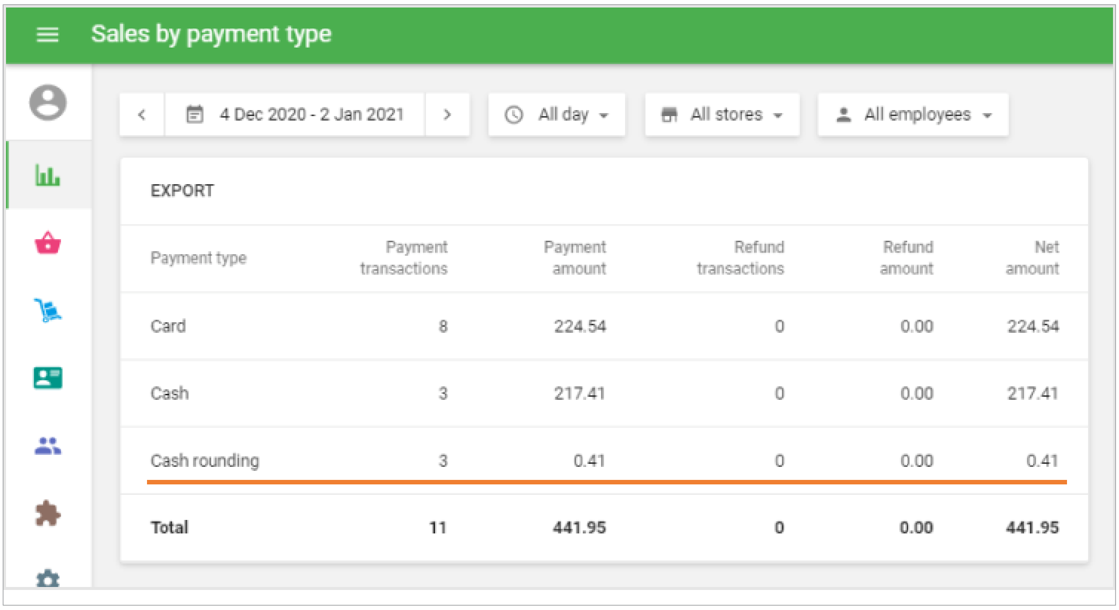
The receipt contains information about rounding.

8



You will also see the information about rounding in the Sales by Payment Type report in the Back Office.

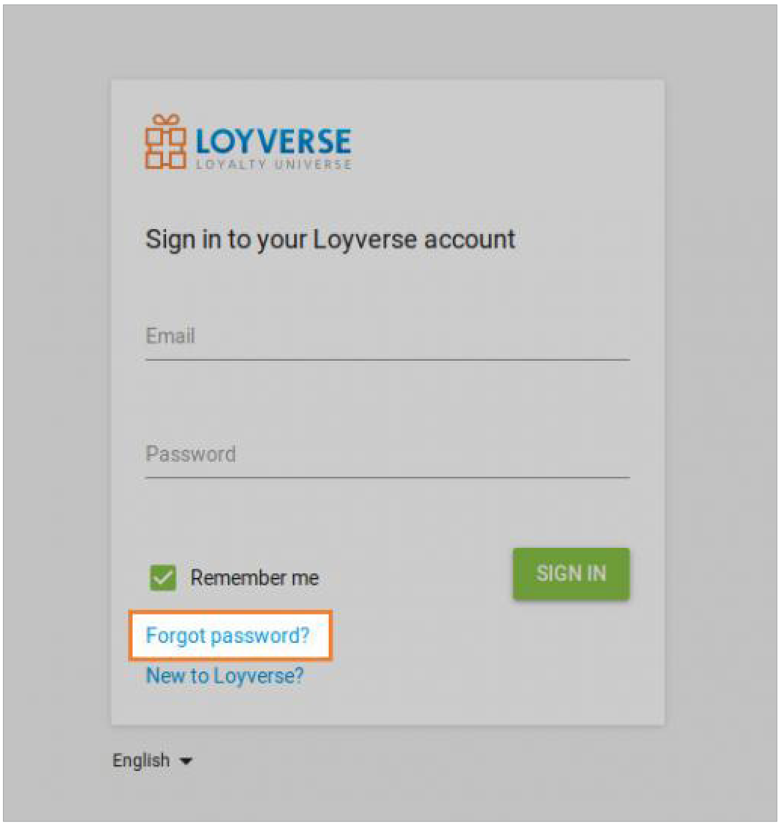
9



8.9 How to Change/Recover Your Password for the Back Office

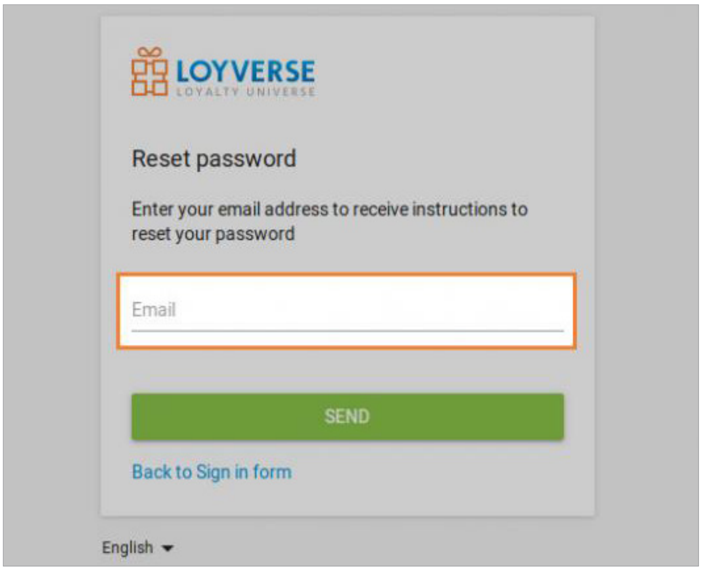
To change or recover your password, go to your Back Office login form: https://loyverse.com/en/login and click "Forgot password?".

1



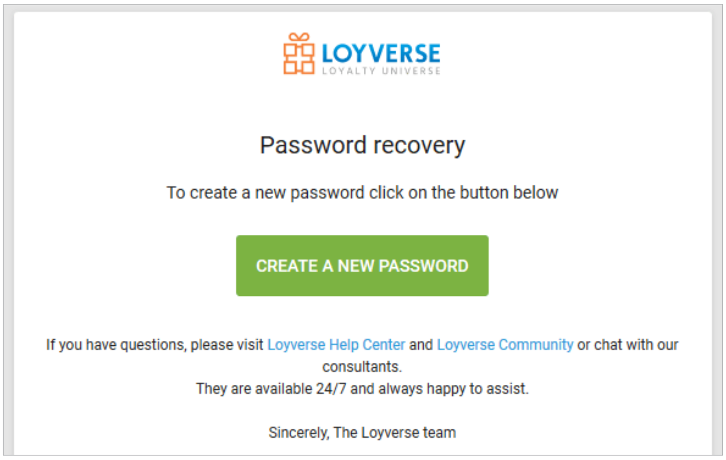
Type your Email into the Reset password form and press ‘Send’.

2



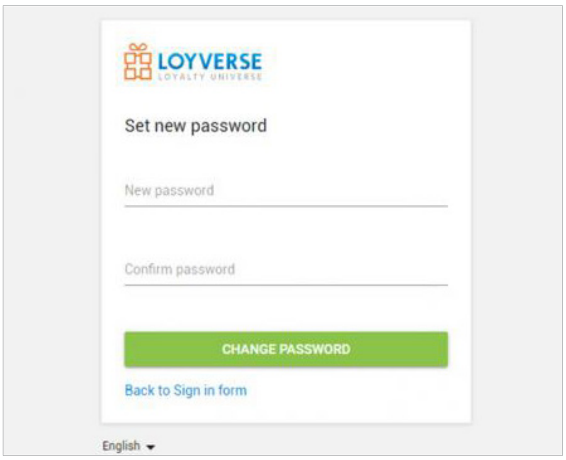
Now check the password recovery instructions which are sent to your email. Sometimes emails are filtered as spam, so if it’s missing from your inbox, try the spam folder. Once you’re in the email, click on the ‘Create a new password’ link.

3



The link brings you to a Set new password form with two password fields. Type your password twice to confirm, then click ‘Change password’.

4



Note

After changing password, all the active connection to the Back Office and Dashboard app will be logout and you have to login again with a new password.

You’ll then be referred to the Back Office.

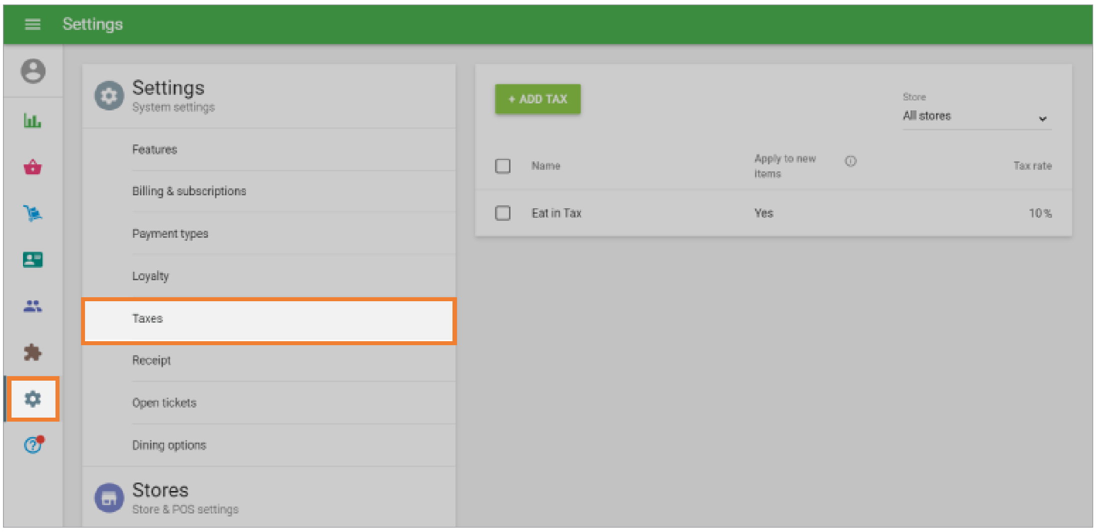
8.10 How to Apply Taxes Depending on the Dining Options

In some countries, the tax on certain goods depends on the dining options. For example, if the customer orders food for takeout, it is not taxed. But in the case of consuming the same food inside the cafe, it is taxed.

Please be sure that the Dining Options is activated in the Back Office.

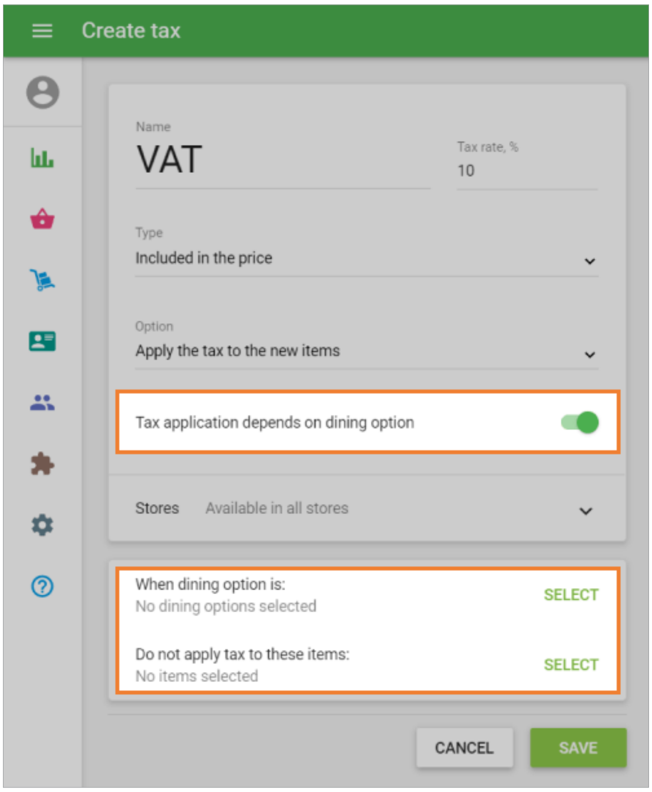
Go to the ‘Taxes’ section in the ‘Settings’ in the Back Office. Open the existing tax to edit or create a new one.

1



Switch on the ‘Tax application depends on dining option’.

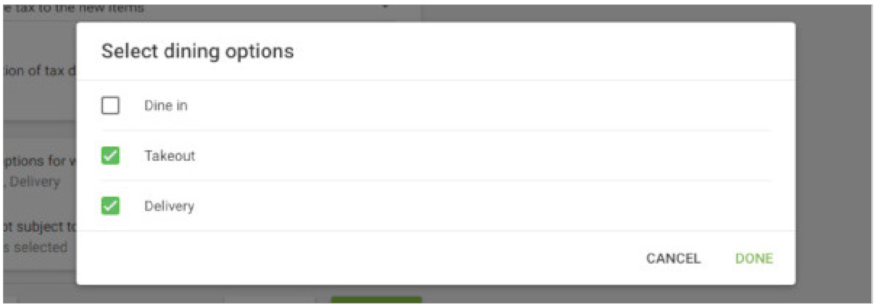
2



Click on the ‘Select’ button to choose the **dining option for which an exemption of the tax applies.**

For example, if you want your tax to apply only for ‘Dine in’, select all other options: ‘Takeout’ and ‘Delivery’.

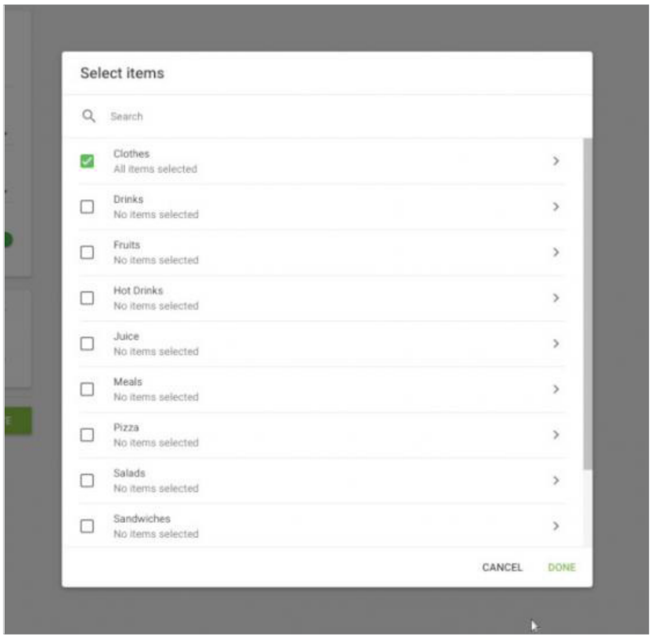
3



Don't forget to save your settings by clicking ‘Done’.

Click on the ‘Select’ button to choose **items not subject to tax.**

4

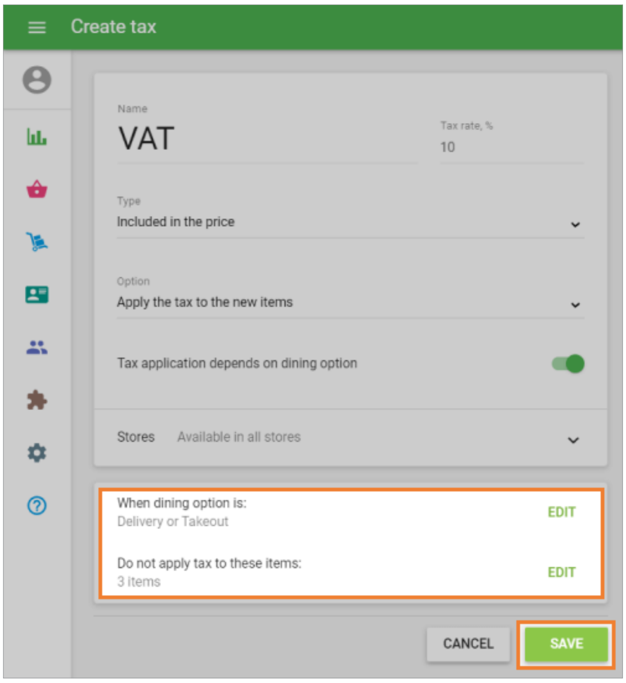


You can select the whole category or certain items that are excluded from tax.

Don't forget to save your settings by clicking ‘Done’.

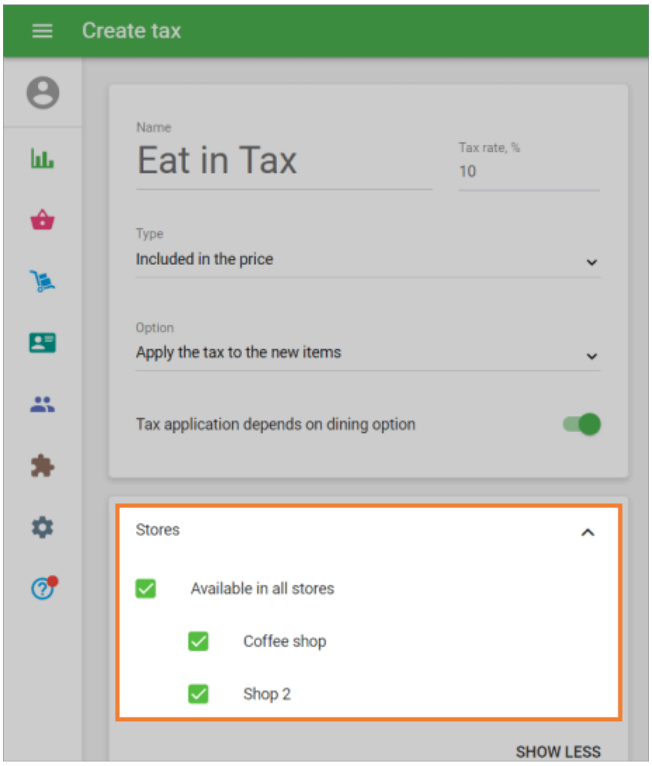
After you have set the exceptions for application of your tax, you will see their short description. You can edit them or save changes.

5



If you have several stores, you can select the availability of the tax for each store.

6



You will also see the information about the applied dining option in the item edit card.

During a sale, the system removes the tax from items in the ticket to which it should not be applied according to the settings and exceptions made for the dining option, so that the cashier does not need to remove it manually.

Note

The cashier can also change the application of the tax to the item manually during the sale, but this change would be applied only to the items in the current ticket.

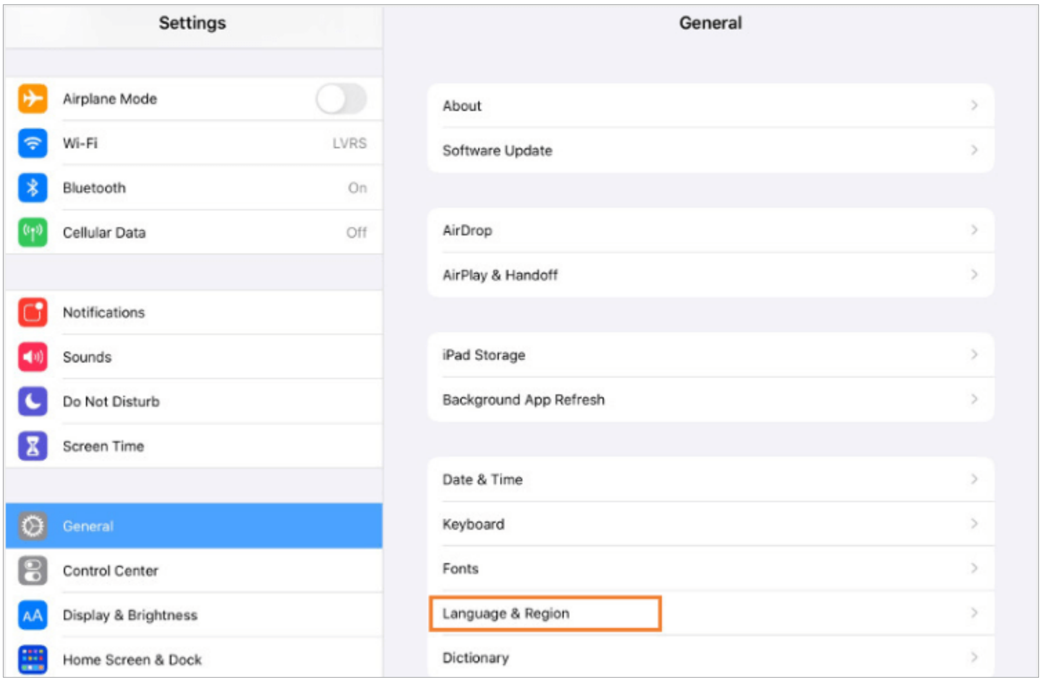
8.11 How to Change Language

8.11.1 Changing Language in Loyverse POS app

The language of the Loyverse POS app on your device depends on the language of the device. Currently, Loyverse POS app supports the following languages: Albanian, Arabic, Bengali, Bulgarian, Chinese Simplified, Chinese Traditional, Croatian, Czech, Danish, Dutch, Estonian, Finnish, French, Georgian, German, Greek, Hebrew, Hindi, Hungarian, Indonesian, Italian, Japanese, Khmer, Korean, Laotian, Latvian, Lithuanian, Macedonian, Malay, Mongolian, Norwegian, Polish, Portuguese, Romanian, Serbian (Latin), Spanish, Swedish, Thai, Turkish, Urdu, Uzbek.

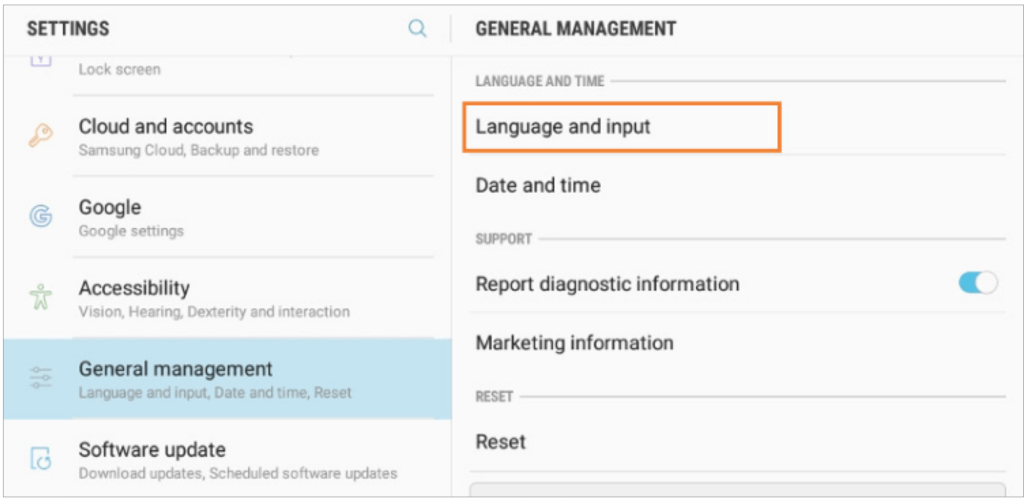
If you want to change the language for the Loyverse POS app, change the device language in the mobile device settings.
For iOS devices, open Settings, and go to the 'General' section. Open the 'Language and Region' menu to change the language.

1



For Android devices, open Settings, and go to the 'General management' or 'System' section. Open the 'Language and input' menu to change the language.

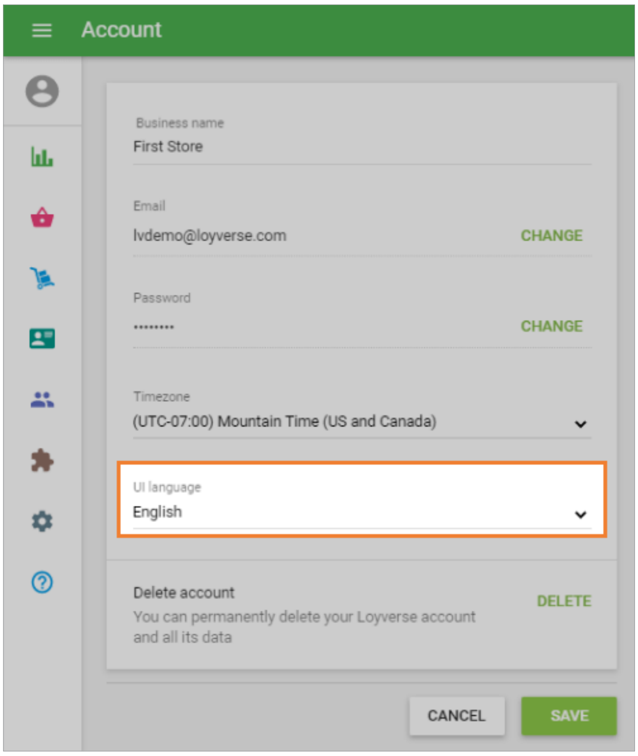
2



8.11.2 Setting Language in the Back office

You can choose a language for the Back Office in the Account settings. Loyverse currently provides more than 20 different languages: English, Spanish, French, German, Russian, Portugues, Polish, Romanian, Italian, Indonesian, Japanese, Korean, Chinese, and others.

1



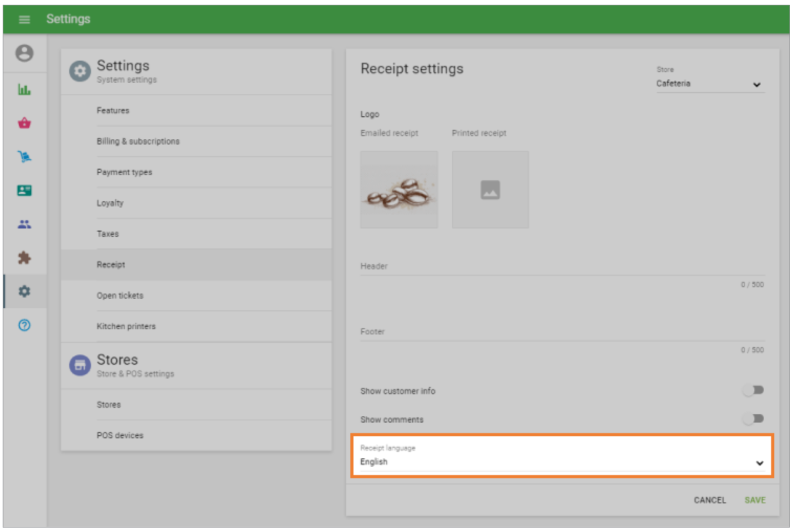
Note

The language settings of the Back Office will not influence the language of the Loyverse POS app.

8.11.3 Receipt Language

In the Receipt section of the Back Office Settings, you can set the language on the receipt for each store. The receipt language may vary from the POS and Back Office language and will be applied to the printed receipt as well as emailed one and in the Receipt menu.

1



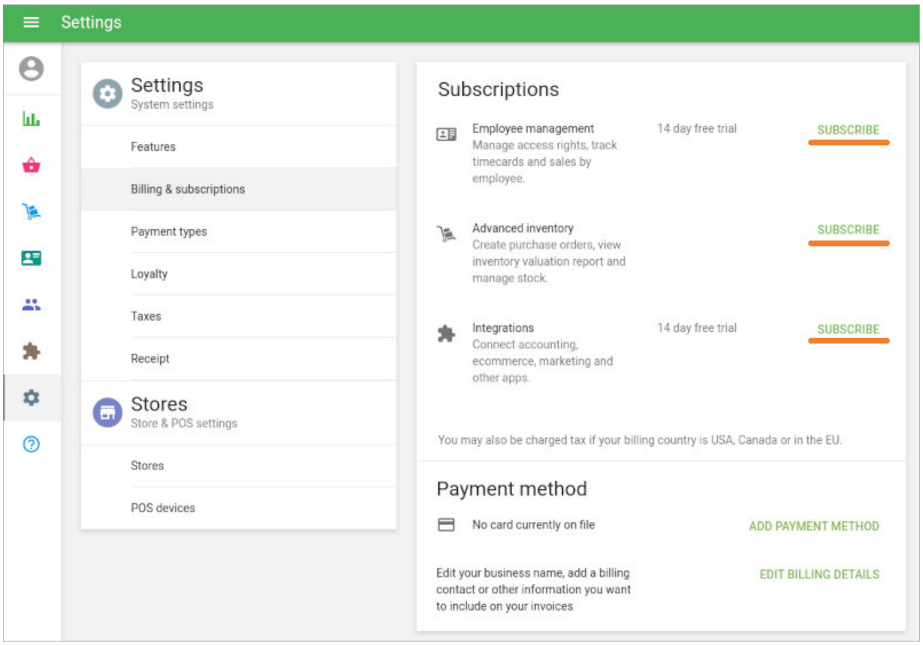
8.12 How to Use Add-on Services of Loyverse POS

Add-on services of Loyverse POS includes subscriptions to Employee management, Advanced inventory and Integrations.

8.12.1 Trial period

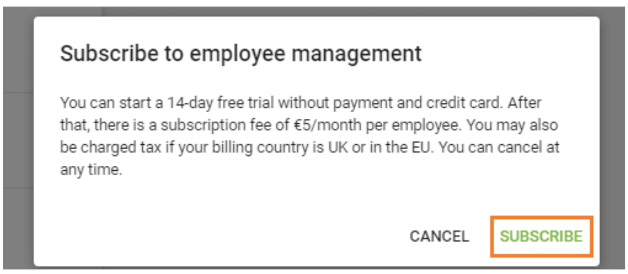
All add-on services have a 14-day free trial period. Starting a trial period does not require a card.
To start a trial, login to the Back Office, click on the 'Billing & subscriptions' button from the Settings menu.
Click on the 'Subscribe' buttons to start a 14-day free trial period for Employee management, Advanced inventory or Integrations.

1



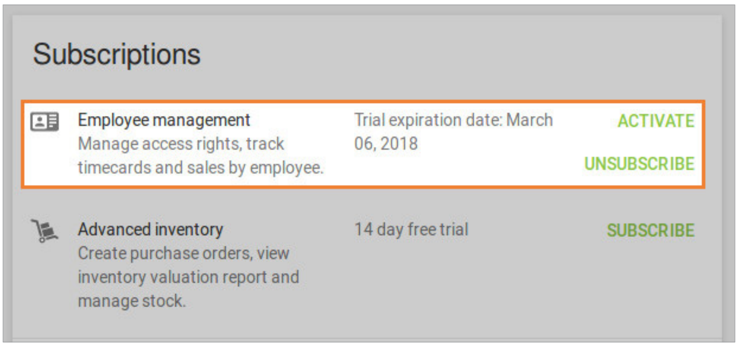
For **Employee management trial**, you will be asked to add employees in the Employees list. When adding an employee, a pop-up window with terms and conditions will appear on your screen. Click on the 'Subscribe' button.

2



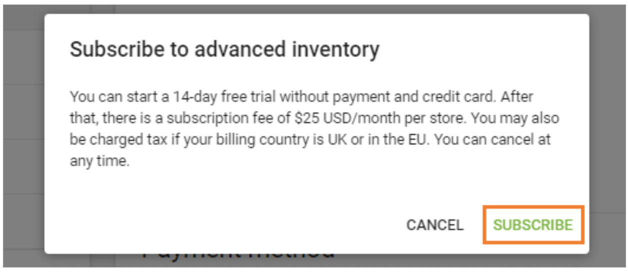
You will see the information about the trial expiration date. If you want to continue using the service, after finishing the trial, activate the subscription by clicking on the 'Activate' button. At any time, you can cancel the trial with the 'Unsubscribe' button.

3



Likewise, for Advanced inventory trial, a pop-up window with terms and conditions will appear on your screen. Click on the 'Subscribe' button.

4

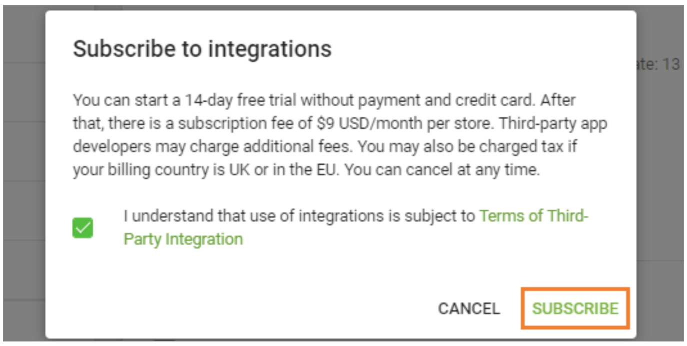


You will see the information about the trial expiration date. If you want to continue using the service, after finishing the trial, activate the subscription by clicking on the 'Activate' button. At any time, you can cancel the trial with the 'Unsubscribe' button.

5

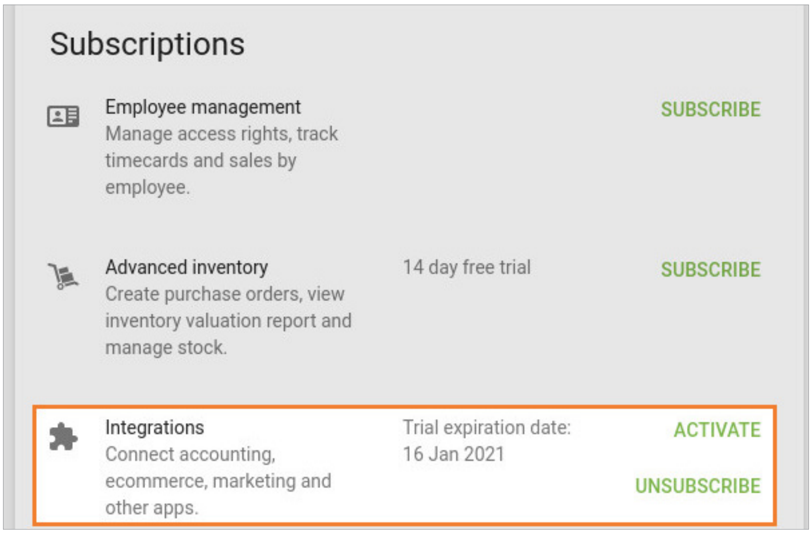
Likewise, for the **Integrations trial**, a pop-up window with terms and conditions will appear on your screen. Read the Terms o Third-Party Integration, and agree with them by selecting the check box. Click on the 'Subscribe' button.

6



You will see the information about the trial expiration date. If you want to continue using the service, after finishing the trial, activate the subscription by clicking on the 'Activate' button. At any time, you can cancel the trial with the 'Unsubscribe' button.

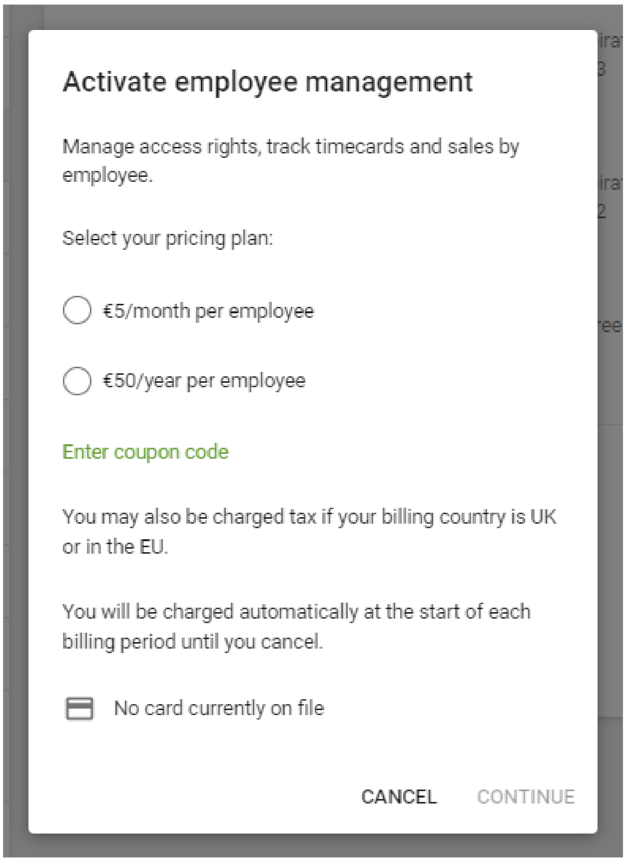
7



8.12.2 Subscription to Employee management

When you click on the 'Activate' button at the 'Billing & subscriptions' section, a pop-up window will appear to inform you about the subscription conditions. Select your pricing plan and click on the 'Continue' button to start your subscription.

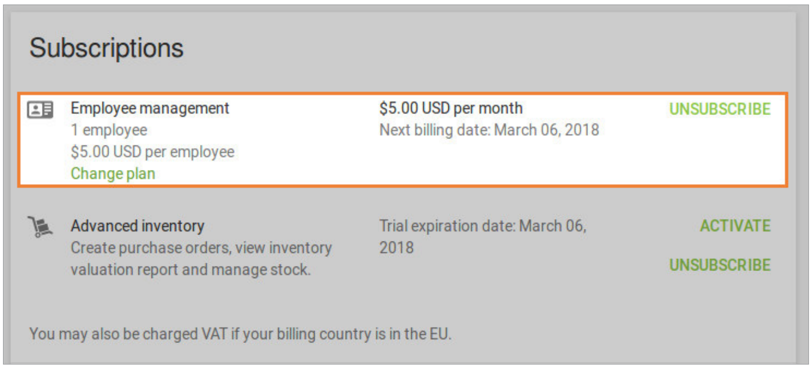
1



If you have not yet added a payment method, you will be redirected to the Add payment method form.

After you finish the subscription process at the 'Subscriptions' box, you can see the information about your active subscription for Employee management.

2

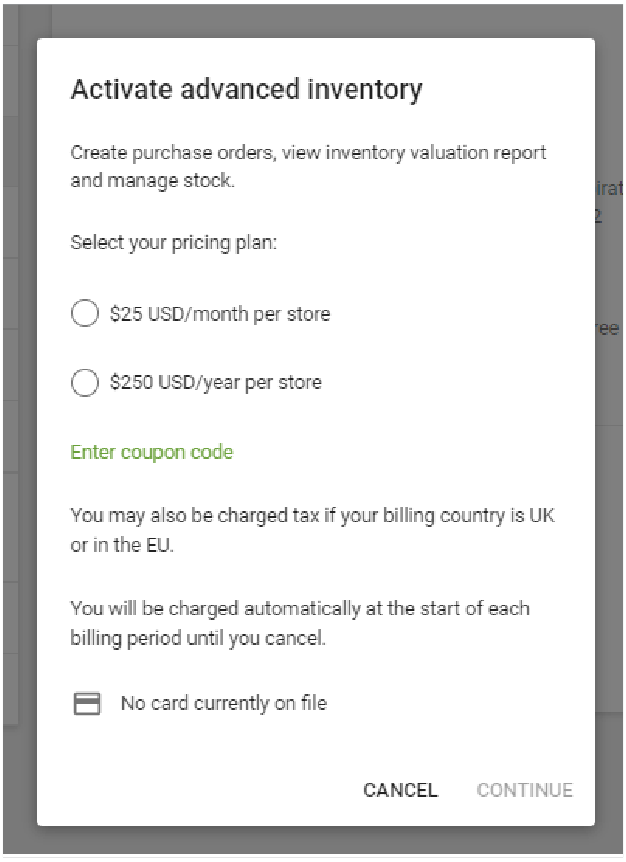


8.12.3 Subscription for Advanced inventory

Click on the 'Activate' button for 'Advanced inventory' in the 'Billing & subscriptions' section to start a subscription.

On the pop-up window, choose the desired pricing plan and click on the 'Continue' button.

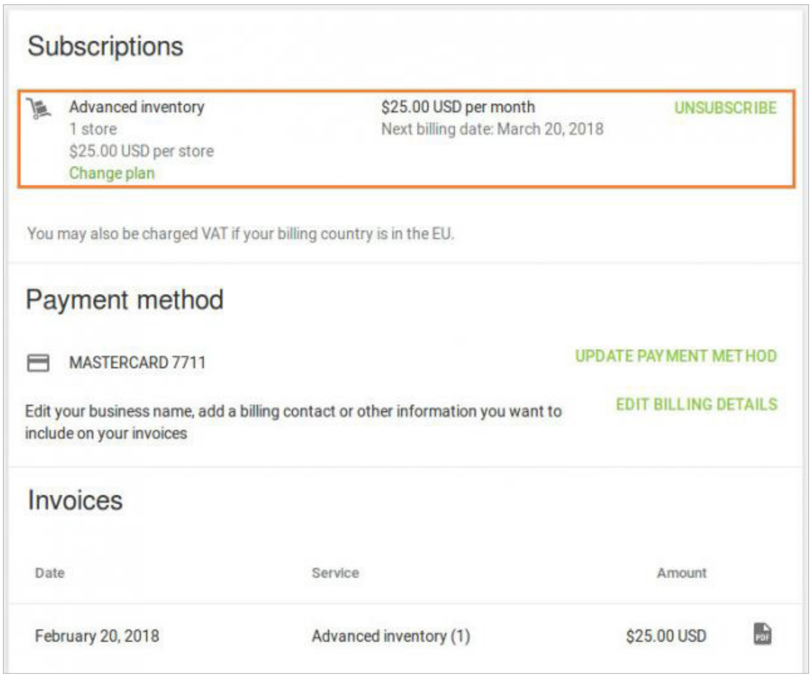
1



If you have not yet added a payment method, you will be redirected to the Add payment method form.

After you finish the subscription process at the 'Subscription' box, you will see the information about your active subscription for Advanced inventory.

2

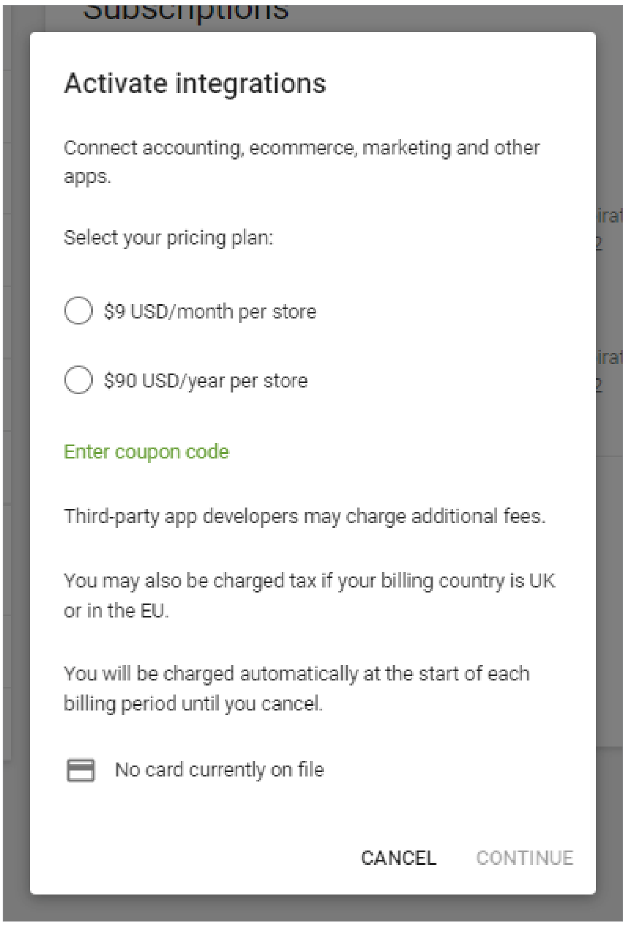


8.12.4 Subscription for Integrations

Click on the 'Activate' button for 'Integrations' in the 'Billing & subscriptions' section to start a subscription.

On the pop-up window, choose the desired pricing plan and click on the 'Continue' button.

1



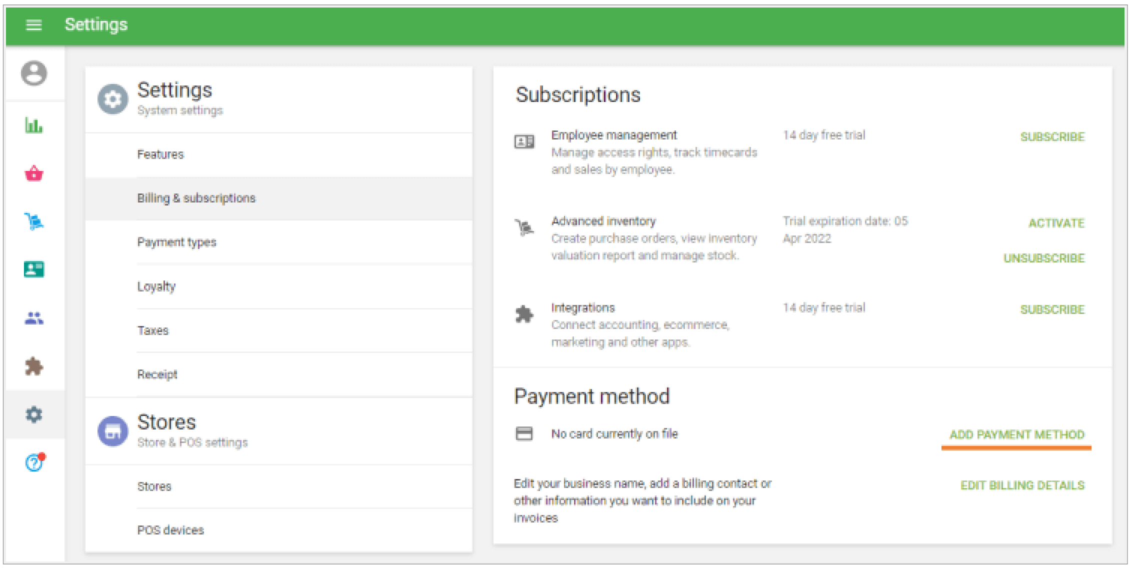
If you have not yet added a payment method, you will be redirected to the Add payment method form.

After you finish the subscription process at the 'Subscription' box, you will see the information about your active subscription for Integration.

8.12.5 Adding payment method

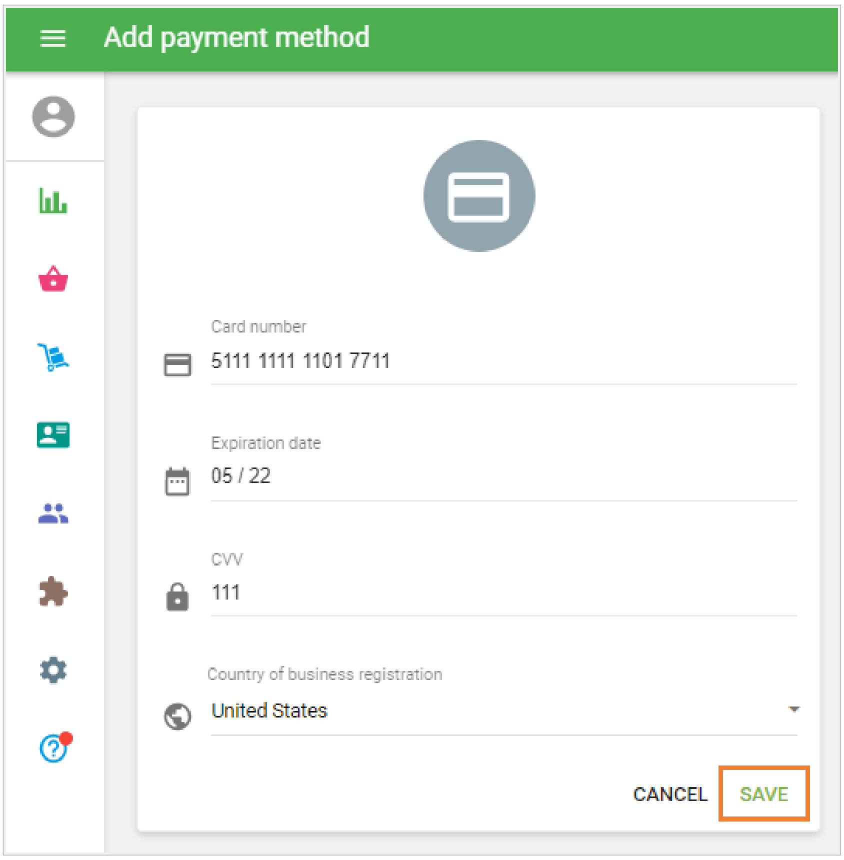
Click on the 'Add payment method' button to add your card information.

1



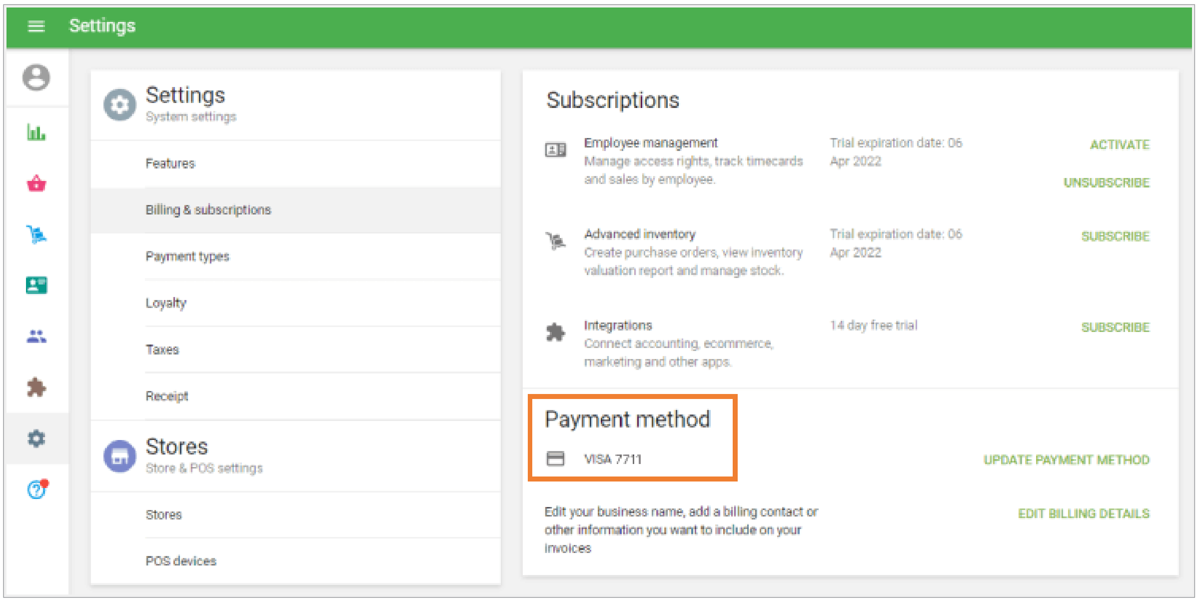
Fill in all fields and click on the 'Save' button. All information will be verified. If any information is missing or incorrect, a pop-up message will notify you what needs to be corrected.

2



If all the information is correct, your card will appear as a payment method.

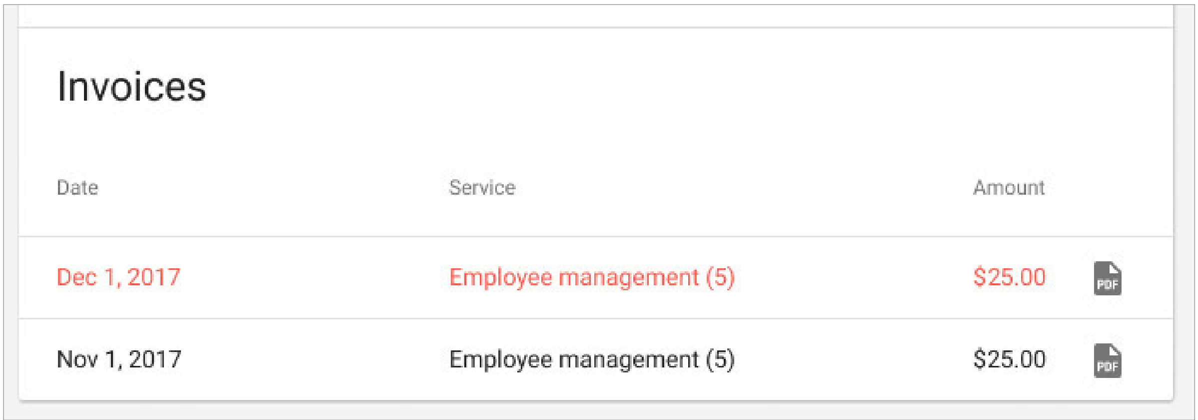
3



8.12.6 Payments for subscriptions

Now, all fees for your subscribed plans will be automatically charged to your bank card that is entered in the 'Payment method'.
All your payment history, as well as warnings about failed payments, will be shown in the 'Invoices' box of the 'Billing' section.

1



Note

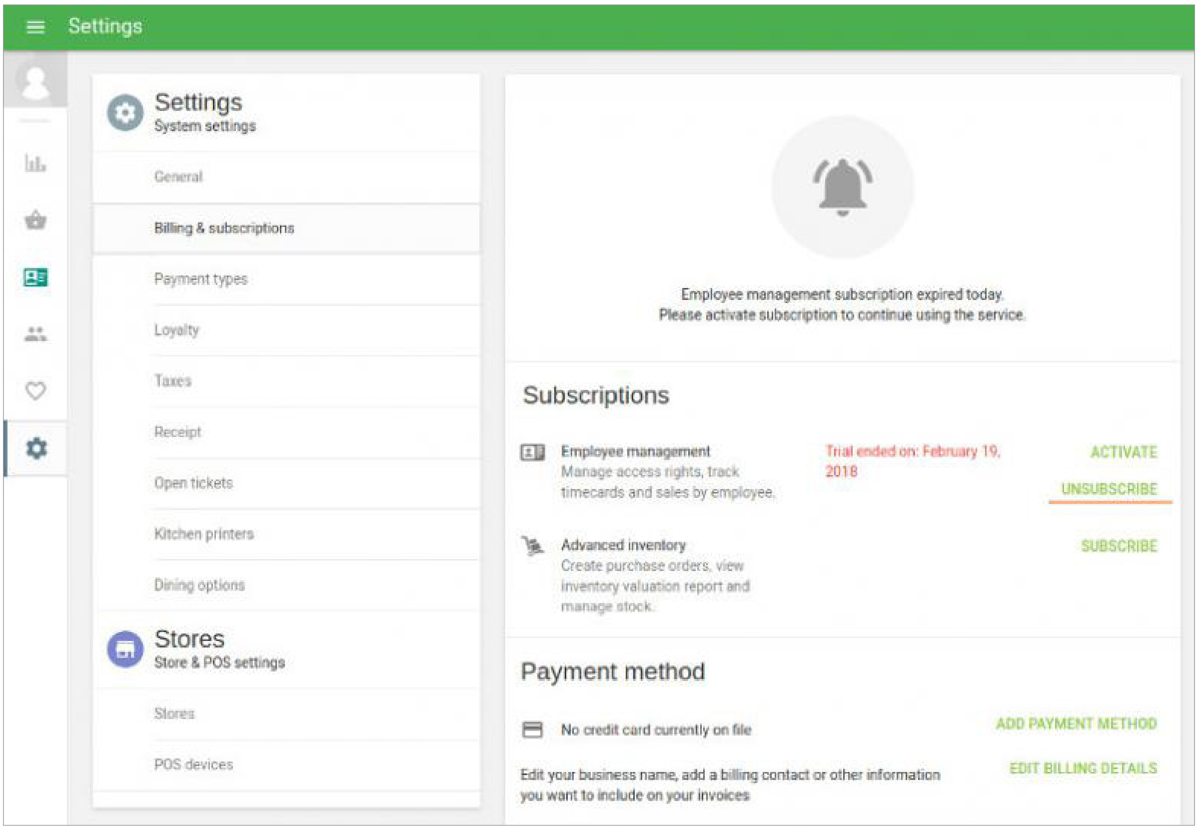
You may also be charged VAT if your billing country is UK or in the EU. You can cancel your Employee management subscription at any time by deleting extra employees in the 'Employee list' section. However, please note that the paid amount is non-refundable and non-transferable. Therefore, if you delete any employees before the paid period ends, the paid amount cannot be refunded and may not be transferred to be used for another employee.

8.12.7 Unsubscribing

When your trial or subscription period has finished, everything in the Back Office will be locked except for the 'Billing & subscriptions' section. For those using it as a trial, the Back Office will become locked immediately after finishing the trial period if you do not take any action. For those who are already subscribed and the subscription period has ended, the system will allow you to continue using the service in debt for 7 additional days. If during this time, you do not pay for the subscription, the Back Office will be locked on the 8th day. To continue working in the Back Office, you have to choose to 'activate' the subscription or 'unsubscribe'.

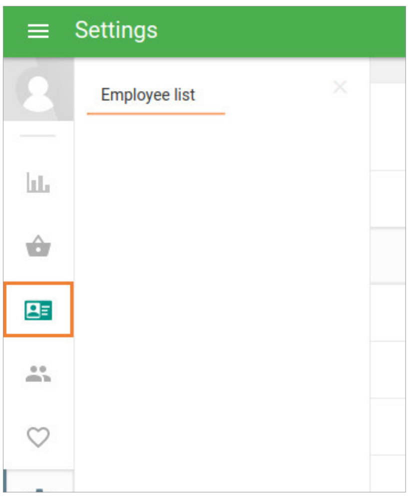
If you click 'Unsubscribe' from the **Employee management**, all your employees will be deleted from the Employees list except for the owner, and you can continue using the Back Office.

1



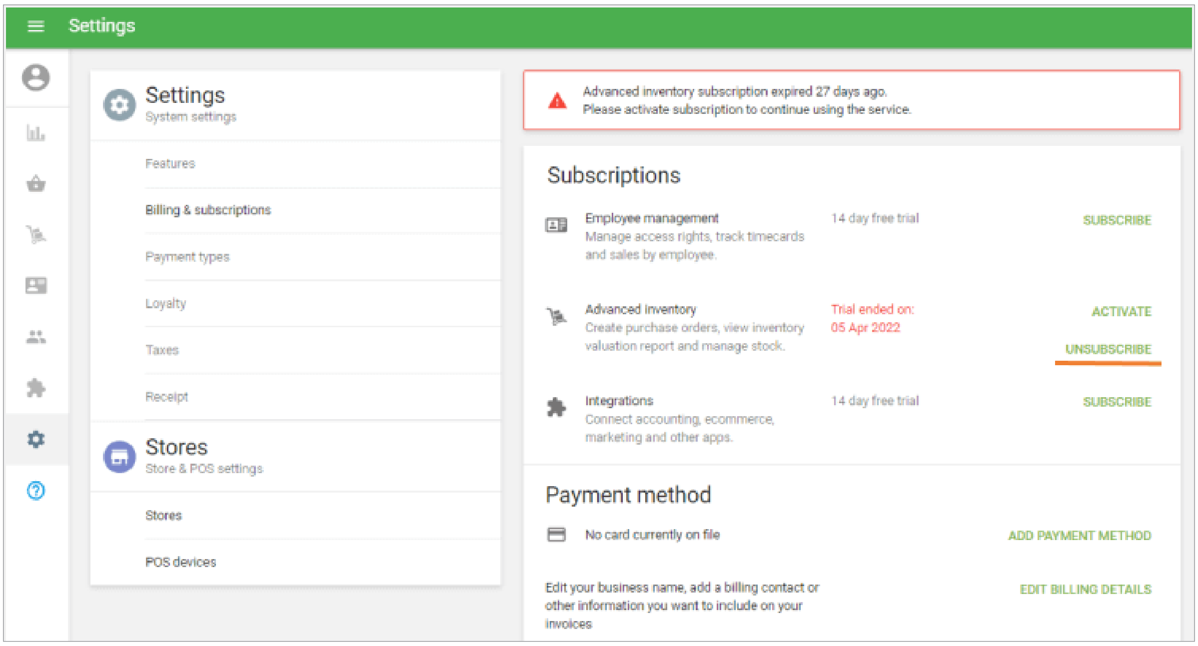
Or you can delete some employees by yourself by going to the 'Employee list' section in the Employees menu and pay for the remaining number of employees.

2



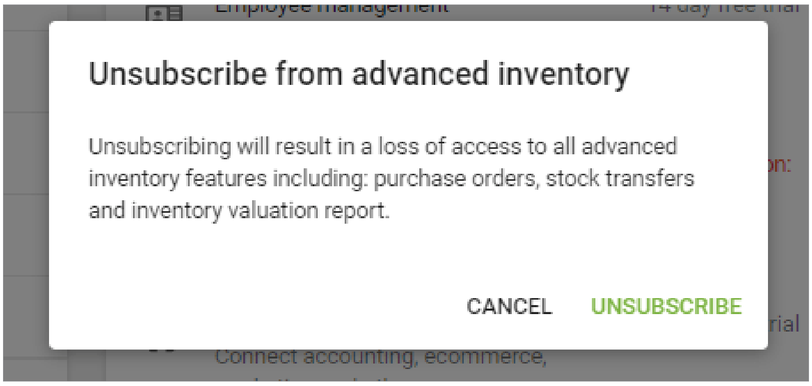
If you click ‘Unsubscribe’ from Advanced inventory, you will see the warning message about the loss of access to the Advanced inventory features.

3



Click on the ‘Unsubscribe’ button to continue.

4



In the locked state, the user also has access to the ‘Stores’ and ‘POS devices’ section in the Settings menu to manage (delete) stores.

Note

Unsubscribing will cancel any outstanding debt for the subscription.
The system transfers the previously paid amounts to the customer’s credit account when:

- changing the pricing plan to a lower one in the middle of the billing cycle
- reducing the number of employees and/or stores in the middle of the billing cycle
- unsubscribing in the middle of the billing cycle

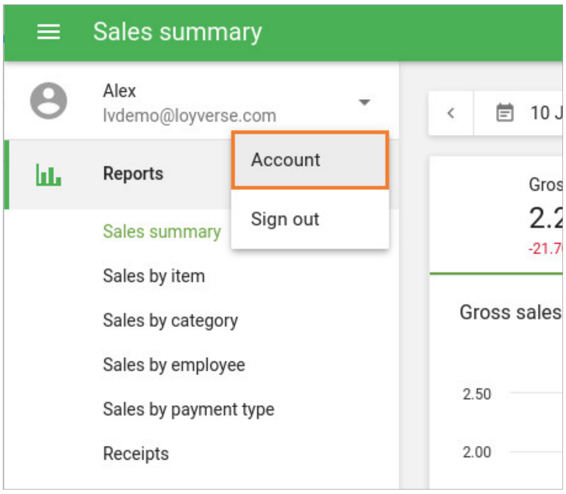
You can use the money from your credit account for the paid services of Loyverse POS.

8.13 How to Manage Account Settings in the Back Office

Every Loyverse user (owner and employees) with access right to the Back Office has a page with account settings.

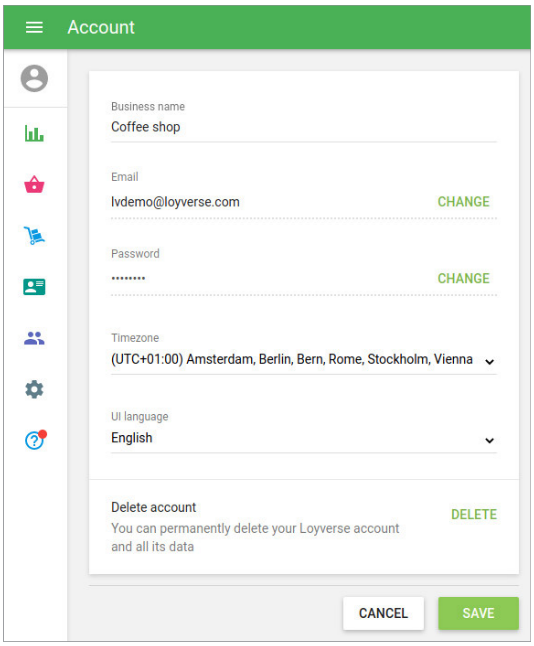
To access the account settings, click on the 'Account' button in the Back Office's main menu.

1



You can see the account profile form. You can change the Email, password, timezone, and language of a user interface for Back Office. Business name changes and deleting account options are available only for the account owner.

2



The Timezone settings affect the time for sending a low stock notification. The time zone for the owner and each employee may vary.

Each user can set his/her interface language for the Back office, and it will not affect the interface language of other users of the same account.

Changing Email, password, and deleting accounts require password confirmation for security reasons.

Note

Deleting the account will unsubscribe from all paid services and email newsletters.

8.14 How to Increase the Font Size on Android Devices

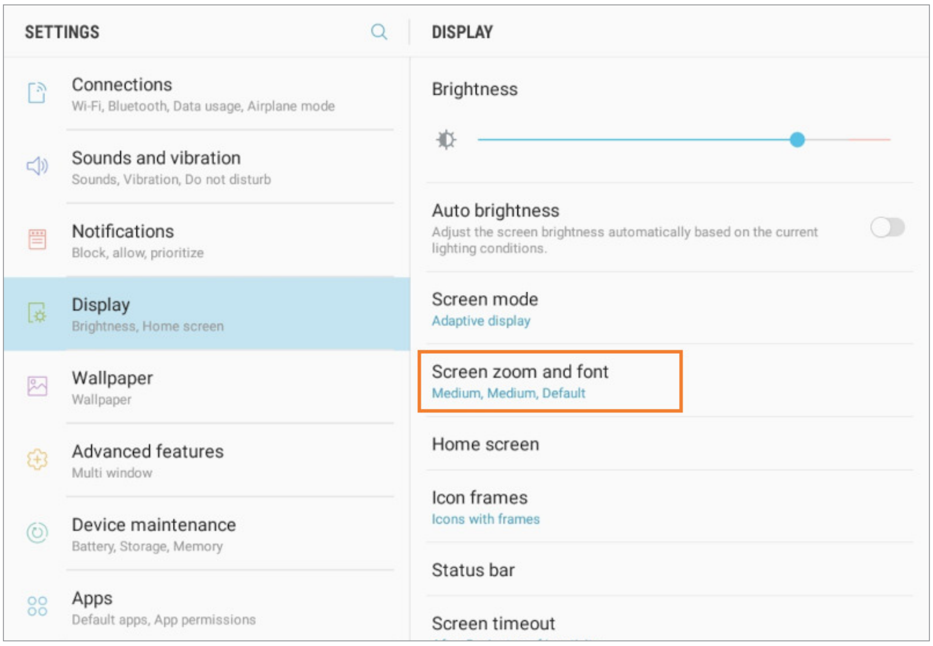
It is possible to increase the font size of the text in the Loyverse POS app on Android devices by increasing it in the device settings.

Note

The built-in functionality of Android implements this option; therefore, some words may be displayed incorrectly in some languages.

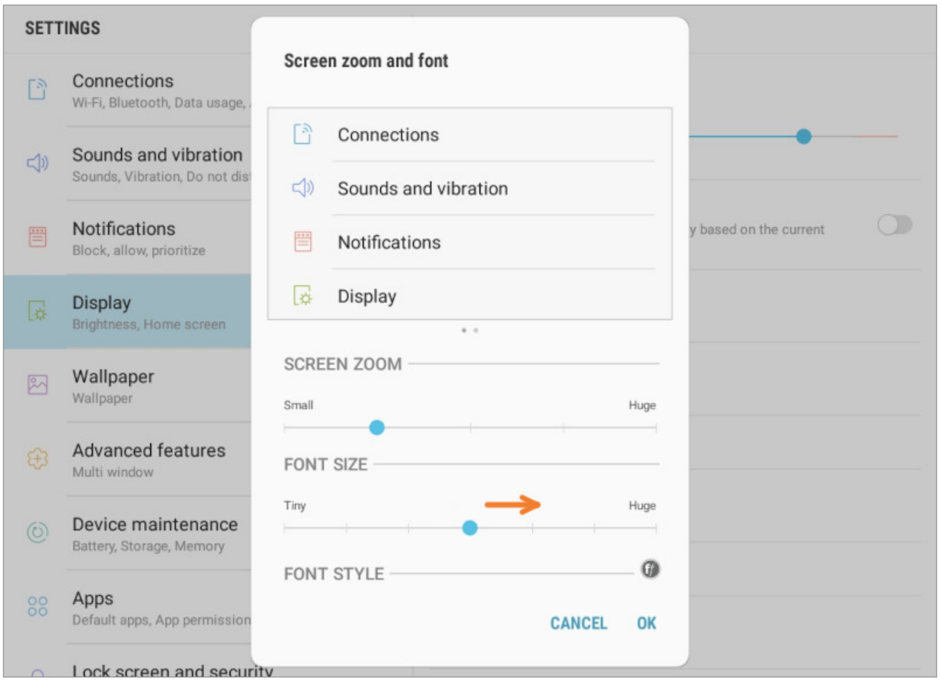
For Android devices, open Settings and go to the 'Display' section. Open the 'Screen zoom and font' or 'Font size' menu.

1



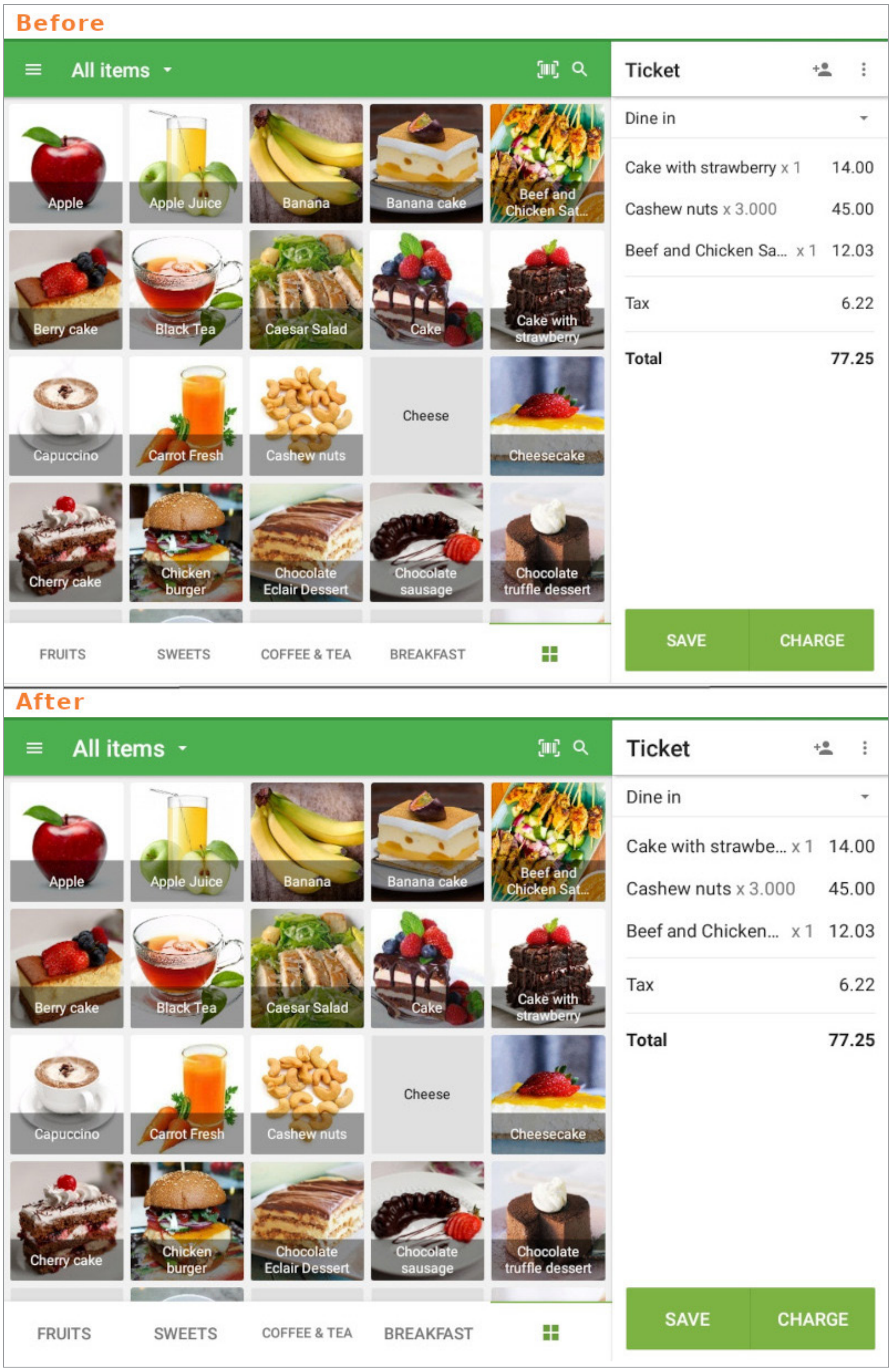
Change the font size of your device.

2



After saving the device settings, the font size of the text in the Loyverse POS app will change.

3

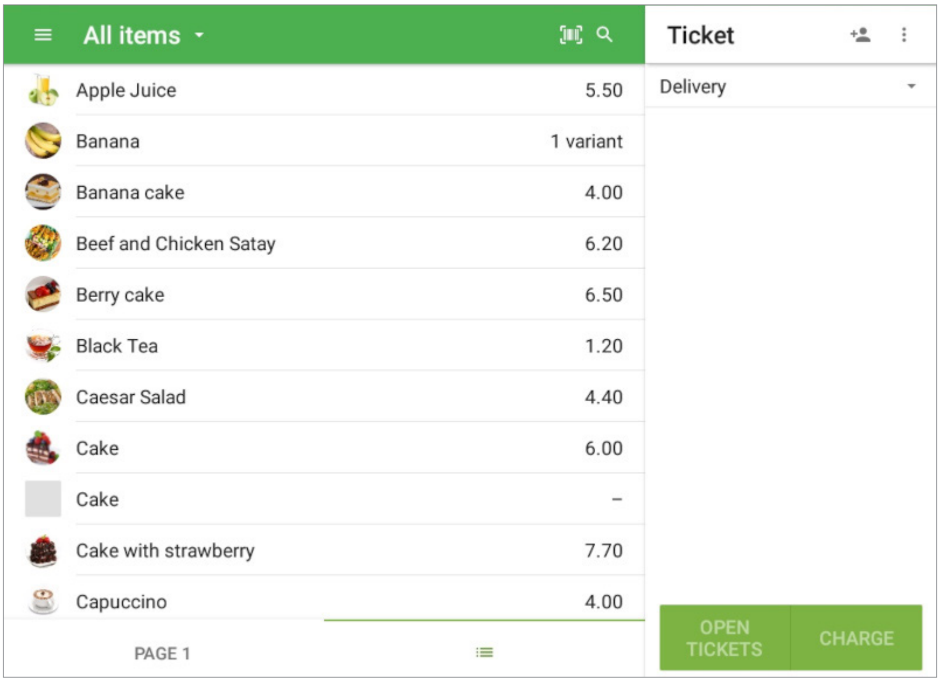


Note

Deleting the account will unsubscribe from all paid services and email newsletters.

To have a bigger font size of the items' names, choose the list option in the application settings 'Home screen item layout'.

4



9. Hardware

9.1 Supported Printers

Note

Please pay attention not only to the printer model but also on the interface through which this model works. If some model of the printer works with one interface, it may not work through another interface.

9.1.1 Supported Printers for Android

Receipt printers compatible with Loyverse POS on **Android devices:**

- Star TSP650II / TSP654IIBl (Bluetooth);
- GP-58130IIC (Bluetooth);
- GP-L80250II (Ethernet);
- GP-58130IIC (Ethernet);
- GP-U80300I (Ethernet);
- Star TSP 100 / TSP143IIILAN (Ethernet);
- Star mc-Print3 (USB, Bluetooth, Ethernet);
- Epson TM-T20II (Ethernet);
- Epson TM-88IV (Ethernet);
- Epson TM-T88V (Ethernet);
- Epson TM-m30 (USB, Bluetooth, Ethernet);
- Posiflex Aura 6900 (Ethernet);
- Xprinter XP-Q200 (Ethernet);
- XPrinter XP-Q800 (Ethernet);
- Star mPOP (Bluetooth);
- EastRoyce ER-58A (Bluetooth);
- EastRoyce ER-80A (Bluetooth);
- Sam4s GIANT-100D (Ethernet, USB);
- Seiko RP-F10 LAN (Ethernet);
- Seiko MP-B20 (Bluetooth);
- Seiko MP-B30 (Bluetooth);
- Citizen CT-E651ET(Ethernet);
- Citizen CT-E651BT(Bluetooth);
- Bematech LR2000 (Ethernet).

However, for Android, you can try to connect another model, not from the Supported printers list. But be aware that not every printer may work with Loyverse POS!

How to Set Up Other Printers in Loyverse POS

Loyverse POS also works on Android POS terminals SunMi and iMin that have built-in receipt printers.

9.1.2 Supported Printers for iOS

These are general requirements for a receipt printer to be compatible with Loyverse POS on **iOS devices:**

- support ESC/POS protocol;
- have Ethernet, Bluetooth or USB (Bluetooth and USB only recommended models) interface.

Consult printer manual or manufacturer website to see if your receipt printer fits these requirements. If so, the printer may work with Loyverse POS, however, there might be special cases. To be 100% sure, please use a printer from the list of recommended models below:

- Star TSP654IIBI (Bluetooth);
- Star mPOP (Bluetooth);
- Star TSP 100 (Ethernet);
- Star TSP143IIILAN (Ethernet);
- Star TSP654IILAN (Ethernet);
- Star SP742 (Ethernet) Note: this is matrix printer, it can print only kitchen orders and cannot print bills and receipts;
- Star TSP143IIIU (USB);
- Star mC-Print3 (USB, Bluetooth, Ethernet);
- Star SM-T300i (Bluetooth);
- Star SM-S210i (Bluetooth);
- Epson TM-T20II (Ethernet);
- Epson TM-T88VI-i (Ethernet);
- Epson TM-m30 (Ethernet);
- Epson TM-m30 (Bluetooth);
- Epson TM-P20 (Bluetooth);
- Sam4s GIANT-100D (Ethernet);
- Seiko RP-F10 LAN (Ethernet);
- Citizen CT-E651ET(Ethernet).

9.2 How to Set Up an Ethernet Printer in Loyverse POS

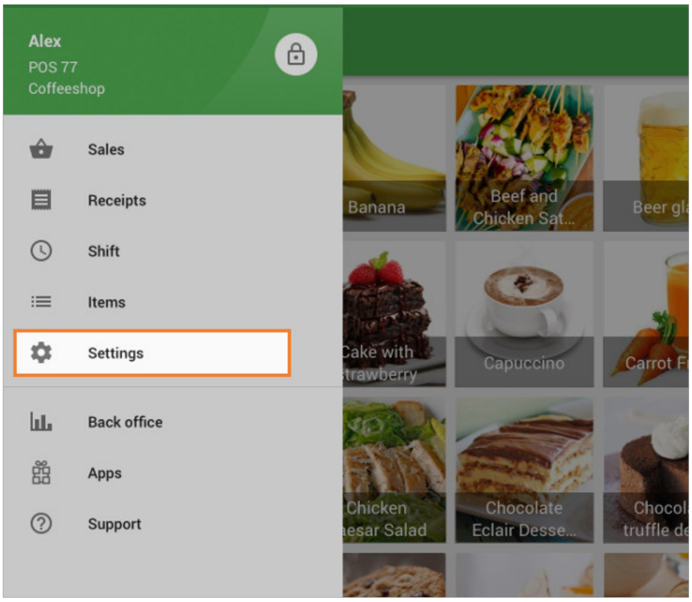
For an Ethernet printer to work with Loyverse POS (Android, iOS), you will need the following:

- Smartphone or tablet with the Loyverse POS app
- Ethernet printer, supported by the Loyverse POS app (see the list of Supported Printers)
- Wi-Fi router
- Ethernet cable

Plug one end of the ethernet cable into the 100/10 Base port of the printer, and the other end into the LAN-port of the router.

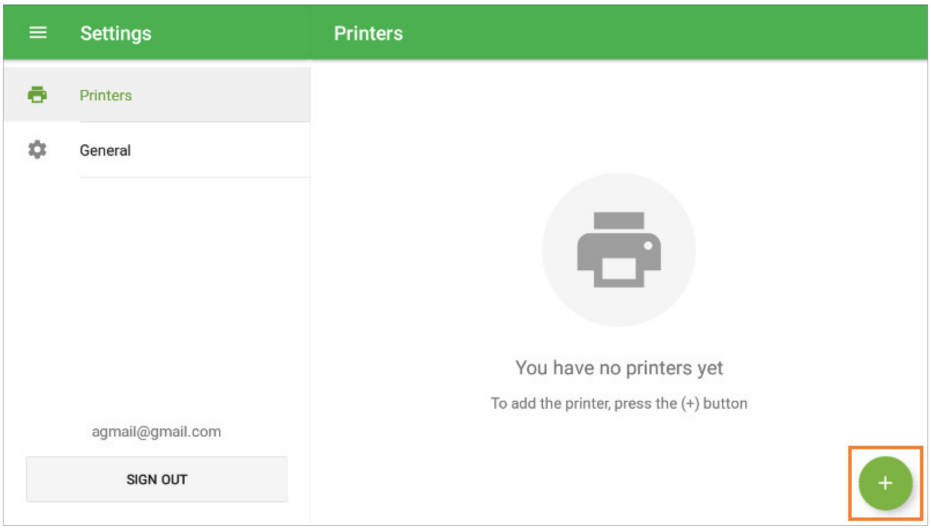
Then in the Loyverse POS app, go to Settings.

1



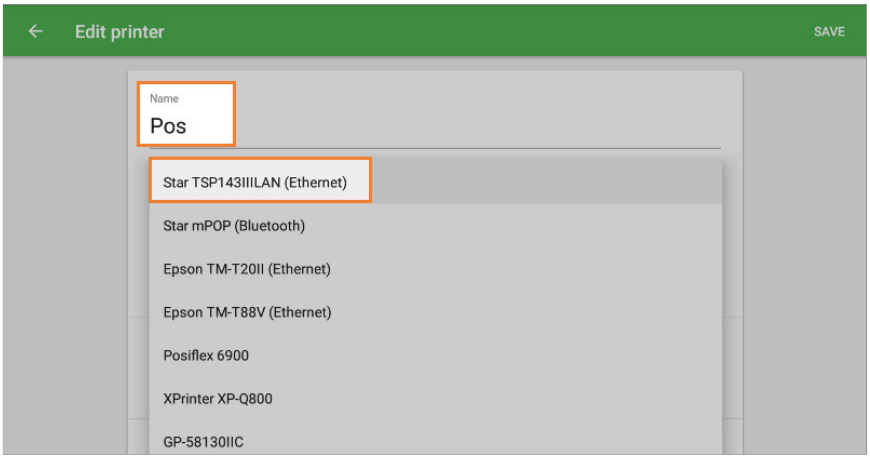
Create a printer by tapping on the '+' button.

2



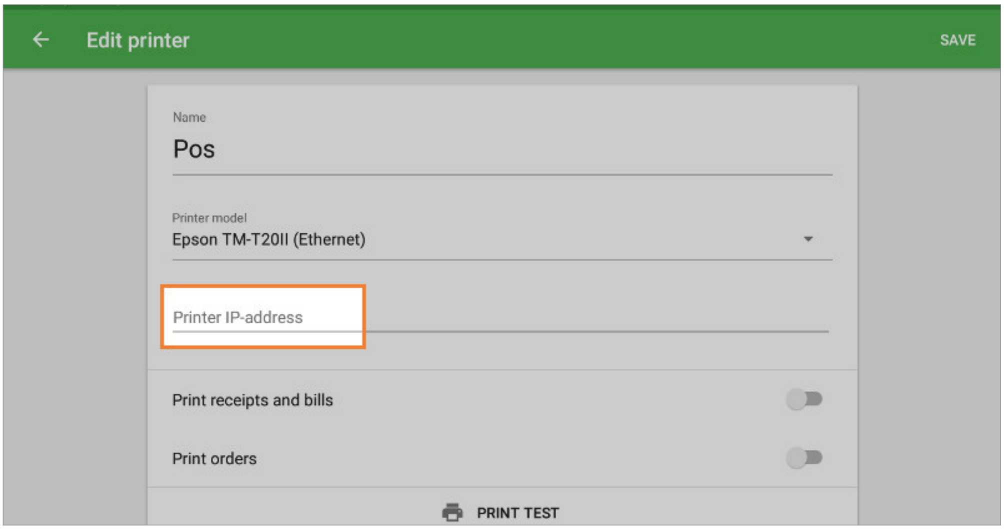
Type the title of your printer in the 'Name' field and select your printer model from the drop-down list.

3



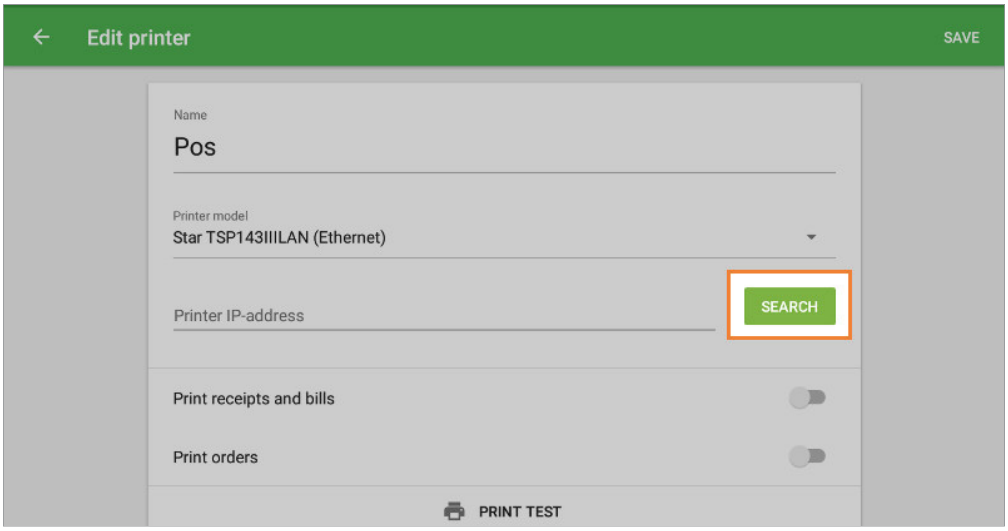
Fill in the 'Printer IP-address' field that you can find in your printer's network configuration report (details: [Troubleshooting When Setting Up an Ethernet Printer](#)).

4



Some printers have the 'Search' button to search for the IP address of your printer automatically. If your Ethernet printer has it, just tap it without filling in the 'Printer IP-address' field.

5

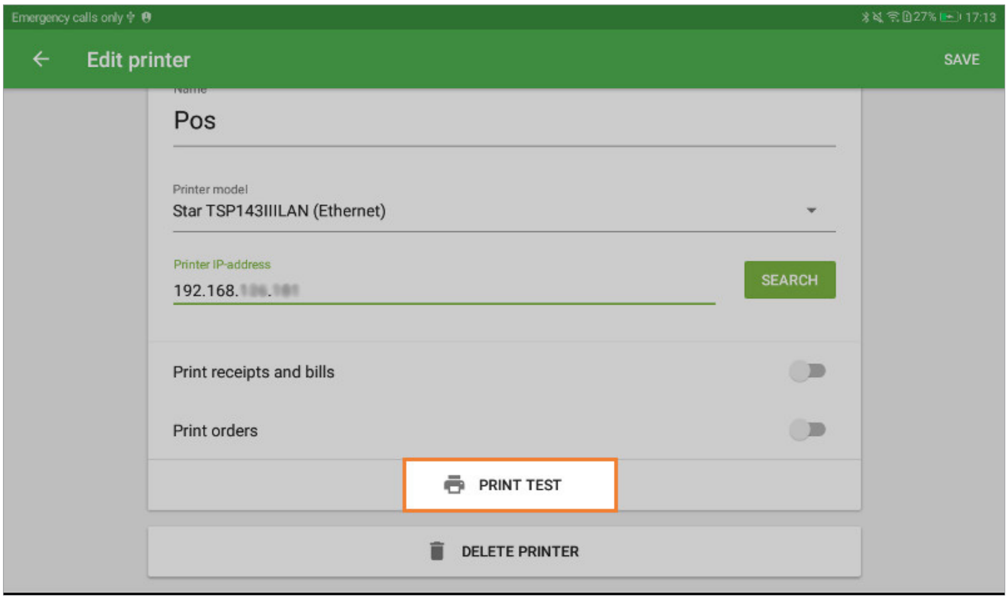


In the following pop up window, you will see the search result with the printer model and its IP address. Tap on it to select the IP-address and then close the window.

6

Tap the ‘Print test’ button to test your printer’s connection with the Loyverse POS app.

7

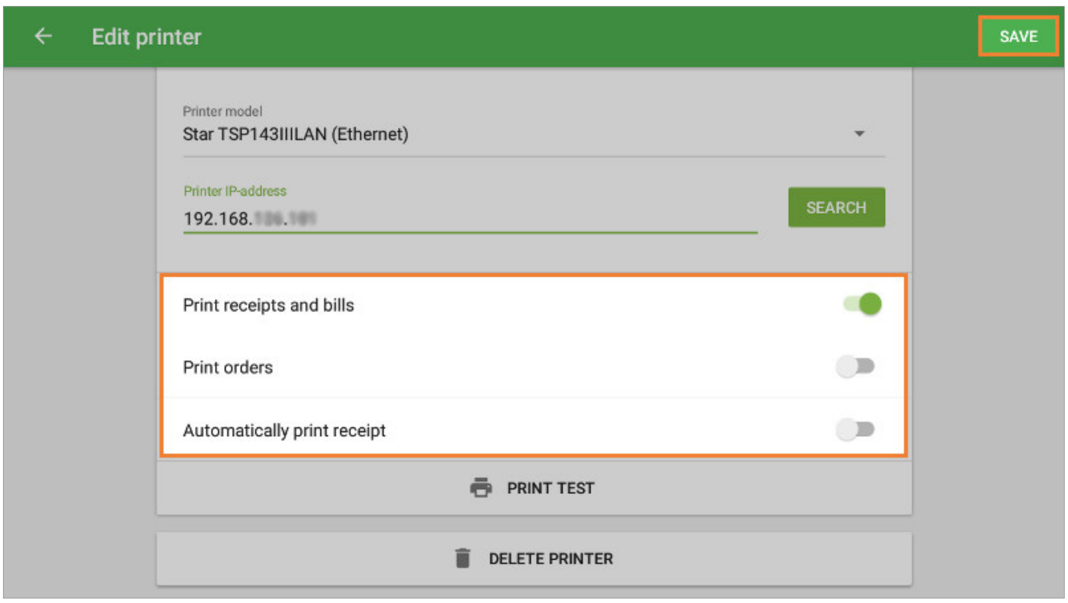


If a test receipt prints out successfully, then your printer is set up correctly.

8

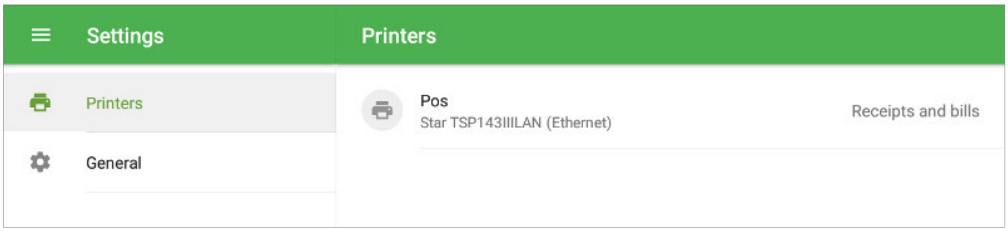
Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the ‘Save’ button.

9



Now you can see your printer in the list. Nice work!

10

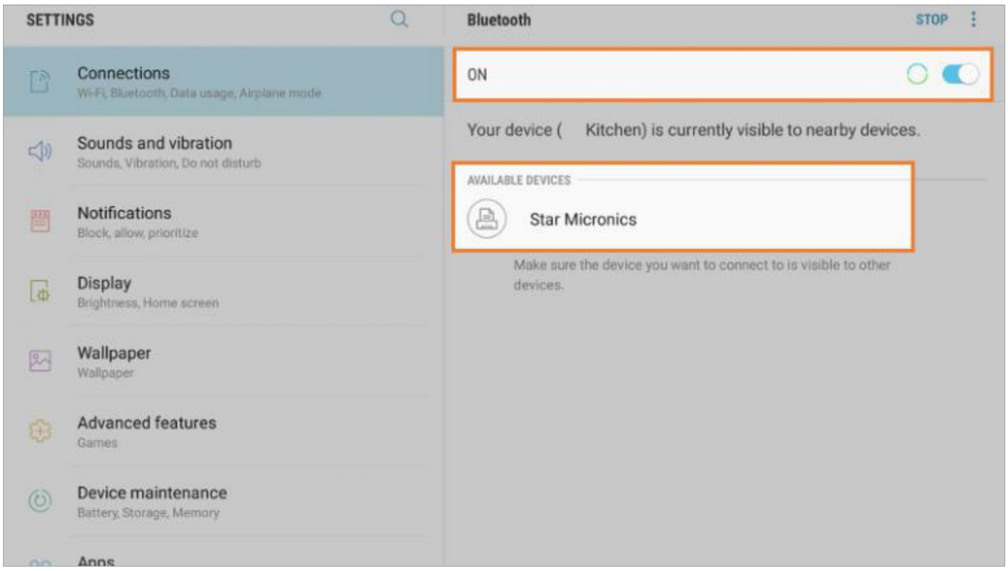


9.3 How to Set Up Bluetooth Receipt Printer with Loyverse POS

This guidance applies to printers on our supported printers list.

First, you have to pair a printer with your mobile device.
Turn on your printer. In your mobile device, go to Settings > Bluetooth, and turn the 'Bluetooth' on. A Bluetooth device search will begin, and you will see your printer on the list.

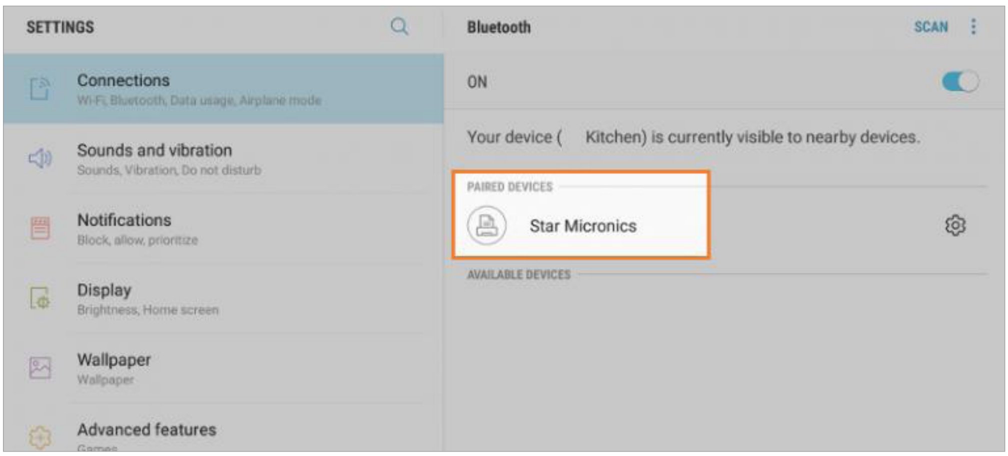
1



Push the 'Pair' button on your printer.

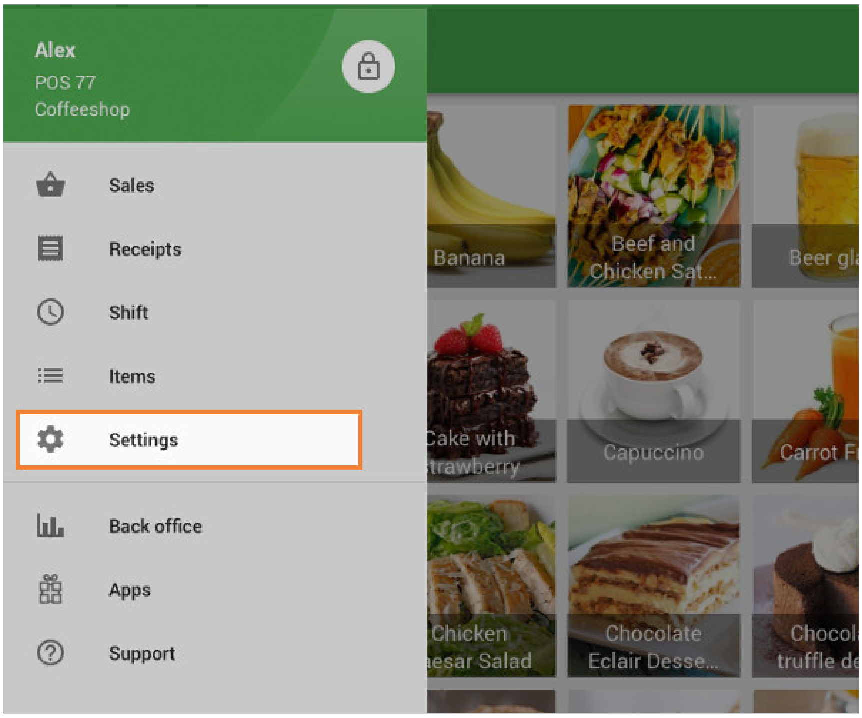
On your mobile device, choose your printer's model from the list of 'Devices'. After a few seconds, the 'Not Paired' status will change to 'Connected' or 'Paired'.

2



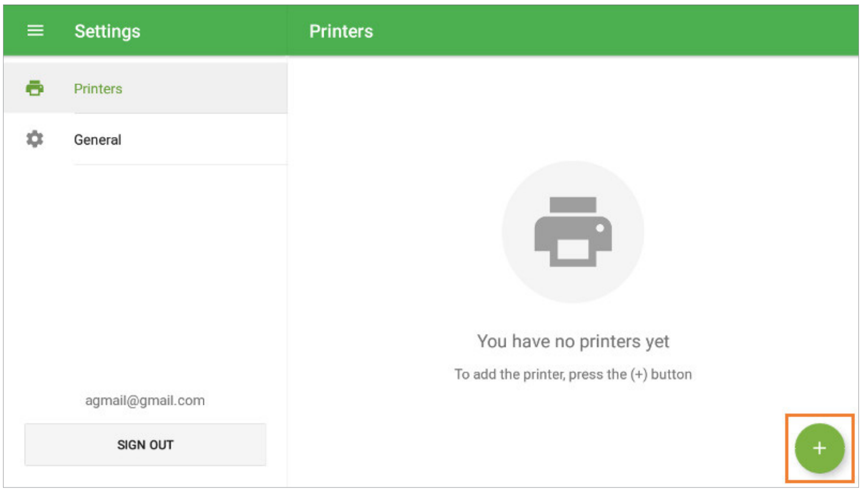
Then, in the Loyverse POS app, go to Settings.

3



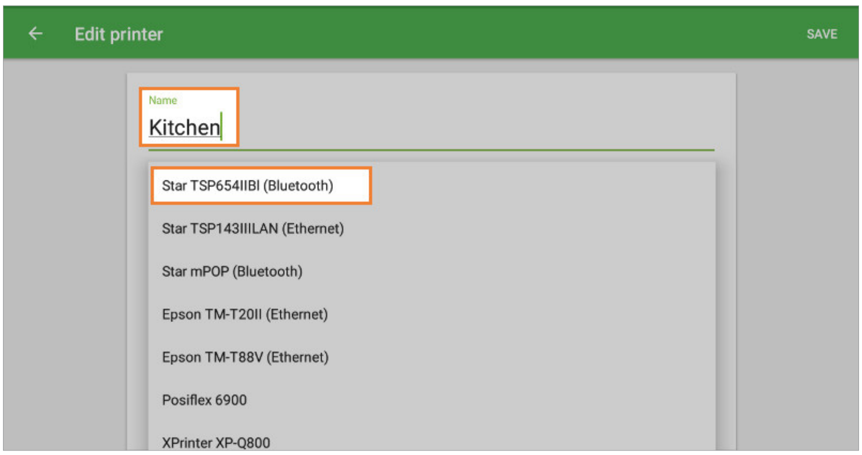
Create a printer by tapping on the ‘+’ button.

4



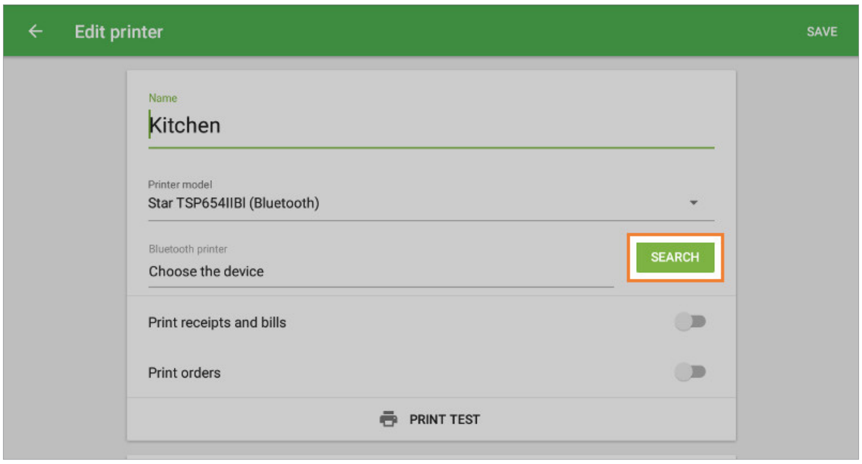
Type the title of your printer in the ‘Name’ field and select its model from the drop-down menu.

5



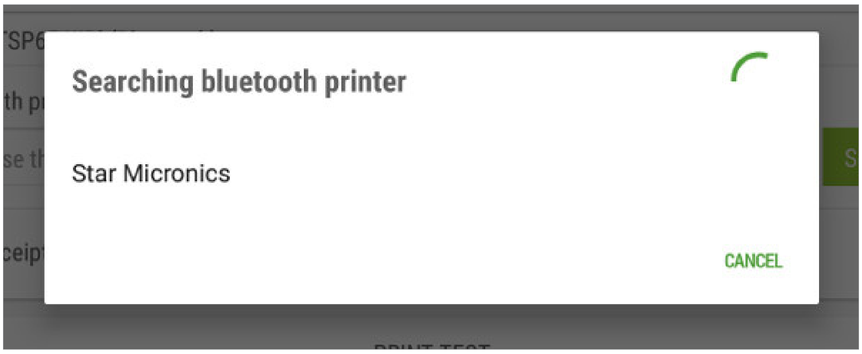
Tap the ‘Search’ button to search for your printer.

6



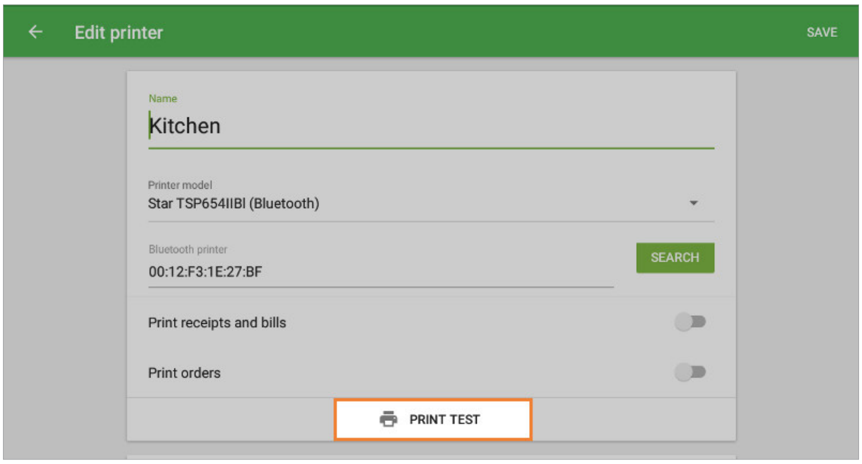
In the following pop up window, you will see the search result with the printer model. Tap to select and close the window.

7



Tap the ‘Print test’ button to test your printer’s connection with the Loyverse POS app.

8

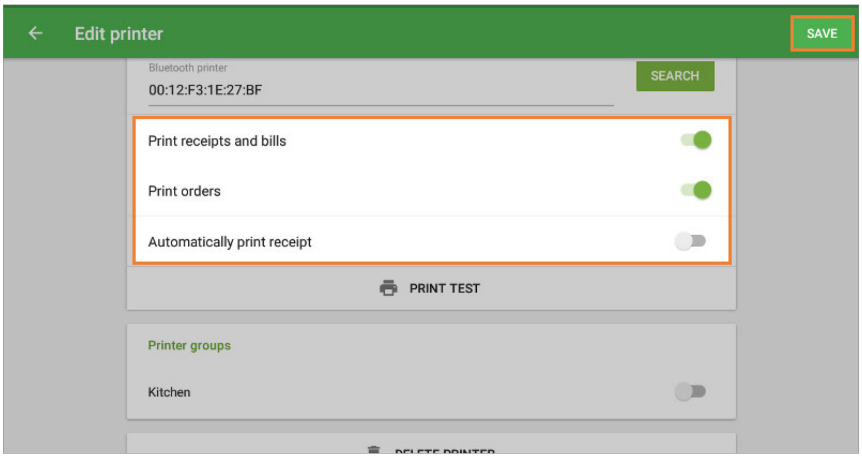


If a test receipt prints out successfully, then your printer is set up correctly.

9

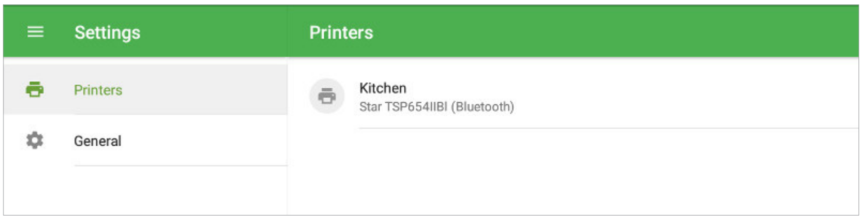
Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the 'Save' button.

10



Now you can see your printer in the list. Nice work!

11



9.4 How to Set Up a USB Printer with an iOS Device

For a USB printer to work with Loyverse POS on iOS, you will need the following:

- iPad or iPhone with the Loyverse POS app
- USB printer, supported by the Loyverse POS app on iOS devices (currently only supports Star TSP143IIIU (USB) and Star mc-Print3 (USB) models. Other USB printers will not work. See Supported Printers list)
- Lightning cable - please use a genuine cable manufactured by Apple or one that is MFi certified

Connect the Lightning cable to the USB Type-A port of the printer.

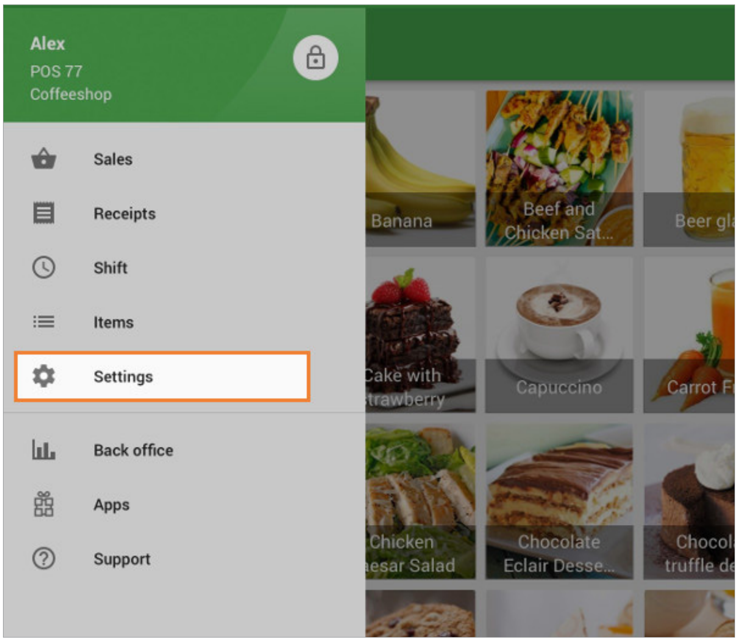
1

Connect the other end of the cable to the smartphone/tablet.

2

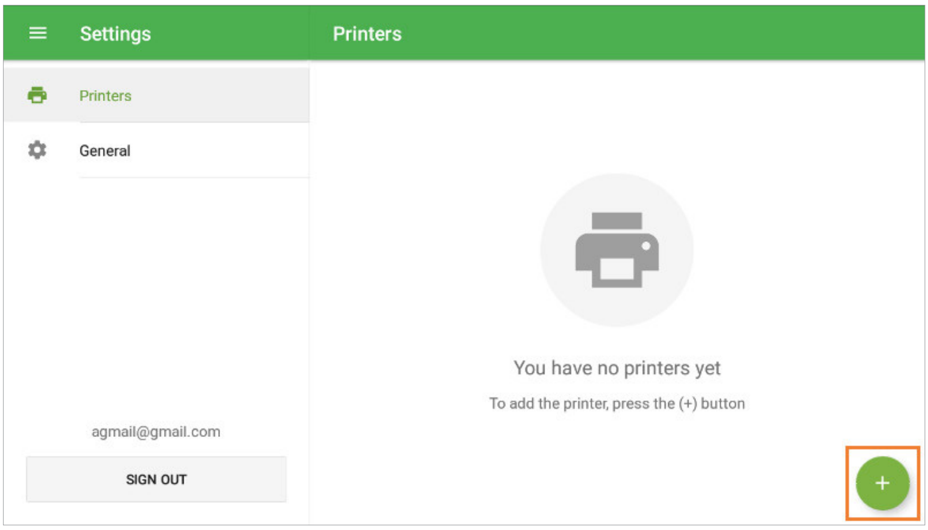
Then in the Loyverse POS app, go to Settings.

3



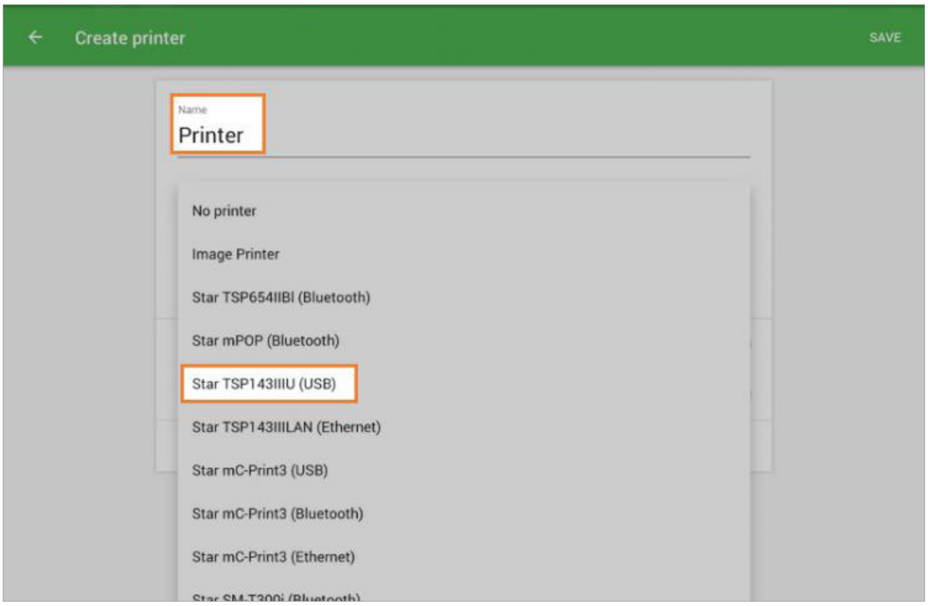
Create a printer by tapping on the '+' button.

4



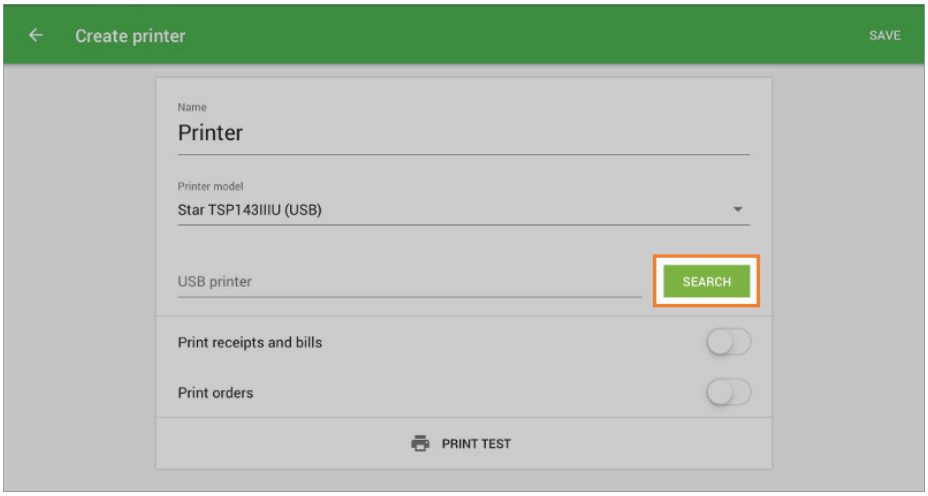
Name your printer in the 'Name' field and select the model of your USB printer from the 'Printer model' list.

5



Tap the 'Search' button to search for your printer.

6

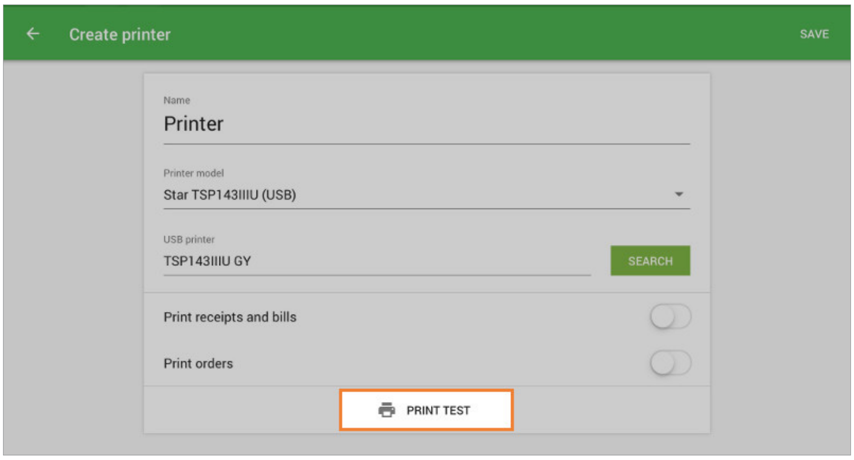


In the following pop up window, you will see the search result with the printer model. Tap to select and close the window by tapping 'OK'.

7

Tap the ‘Print test’ button to test your printer’s connection with the Loyverse POS app.

8

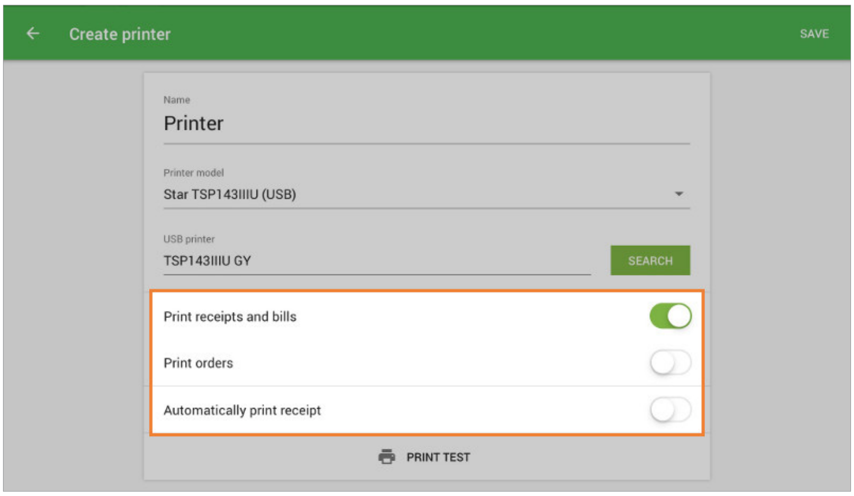


If a test receipt prints out successfully, then your printer is set up correctly.

9

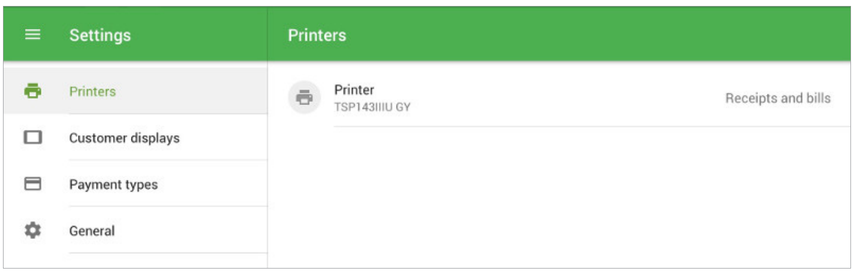
Choose the settings for your printer depending on how you want to use it. Don't forget to save all of the settings at the end by tapping the ‘Save’ button.

10



Now you can see your printer in the list. Nice work!

11



9.5 How to Set Up a USB Printer with an Android Device

For a USB printer to work with Loyverse POS, you will need the following

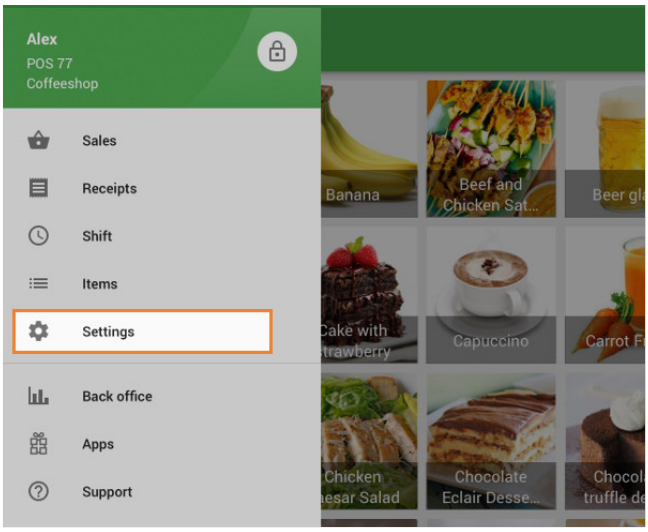
- Smartphone or tablet (with OTG support) with the Loyverse POS app
- USB printer, supported by the Loyverse POS app (should support ESC/POS protocol, see also a list of Supported Printers)
- USB type A to type B cable (goes together with the printer)
- USB OTG adapter or cable
- USB Hub if you want to connect several printers

Plug one end of the USB cable into the USB port of the printer, and the other end into the female USB connector of an OTG adapter or cable. Then, plug the micro-USB end of the OTG adapter or cable into the micro-USB port of your mobile device, and wait for the system to recognize the printer.

If you want to connect several printers, connect them via the USB Hub. The USB Hub connects to your mobile device through a USB OTG adapter or a cable.

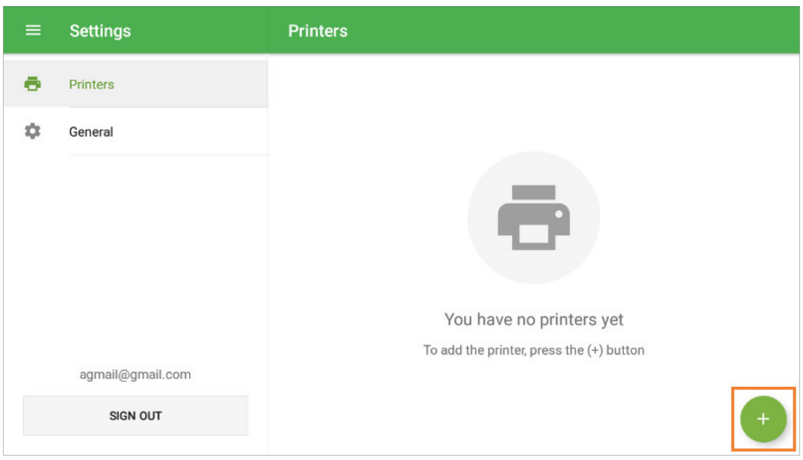
Then, in the Loyverse POS app, go to Settings.

1



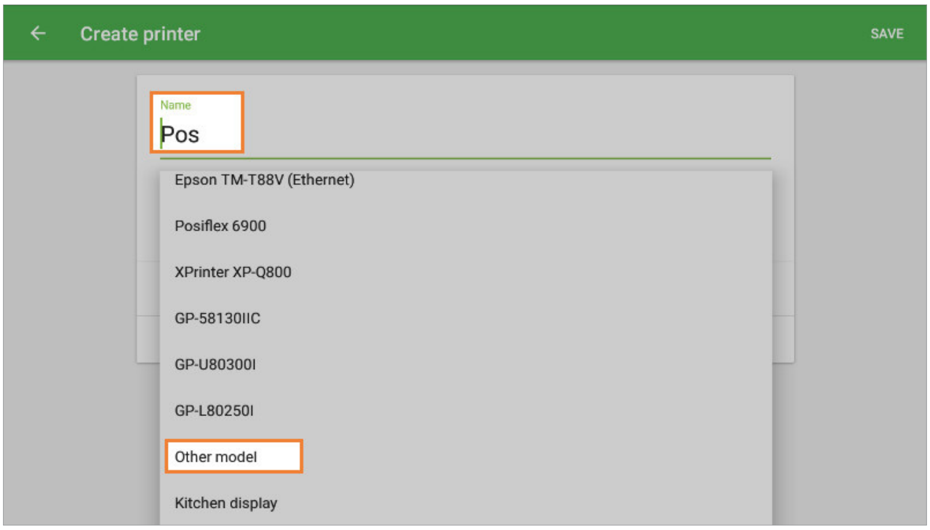
Create a printer by tapping on the '+' button.

2



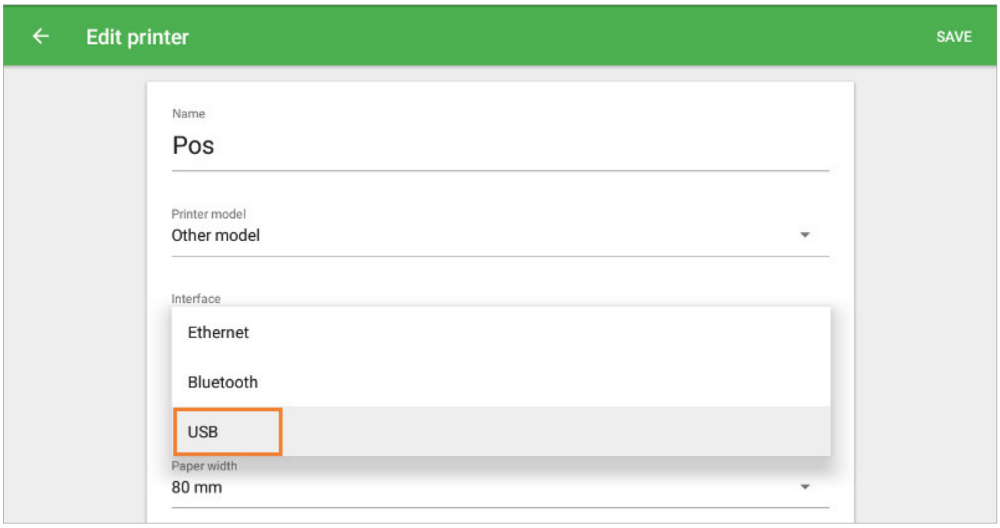
Name your printer in the 'Name' field and select 'Other model' from the 'Printer model' list.

3



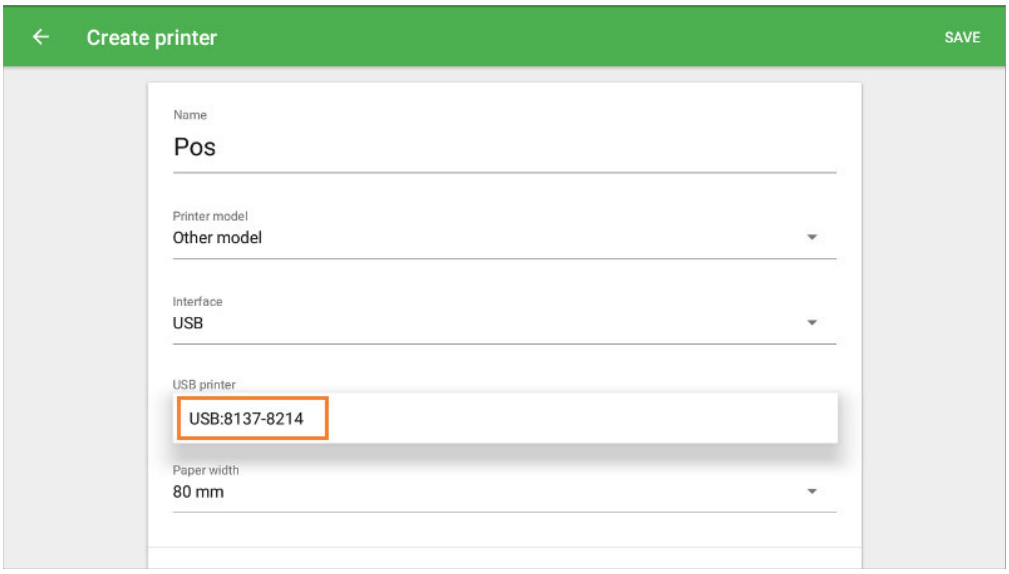
Select 'USB' in the 'Interface' field.

4



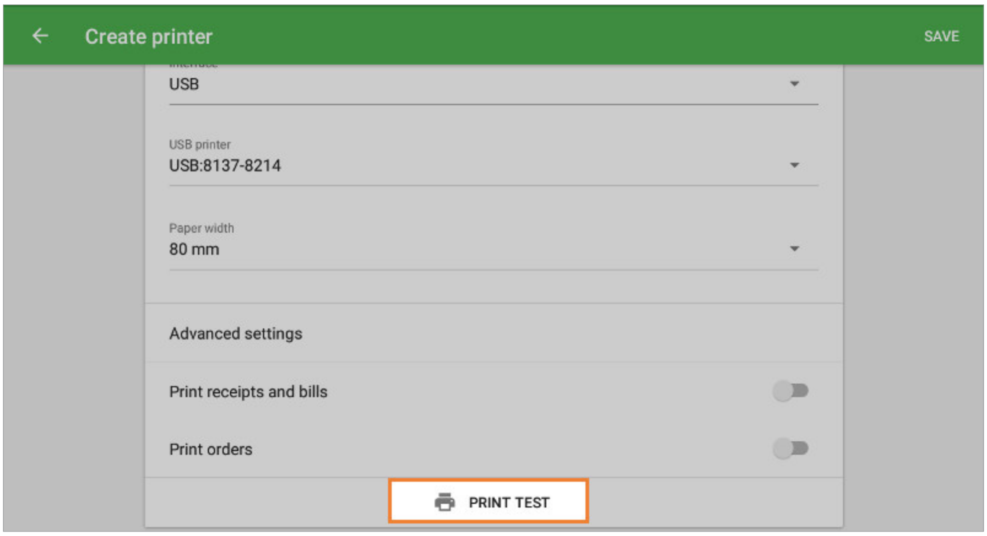
Now, select your printer from the drop-down menu. USB Printers are named in USB:VID-PID format. VID stands for Vendor ID, and PID is the Product ID.

5



Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.

6

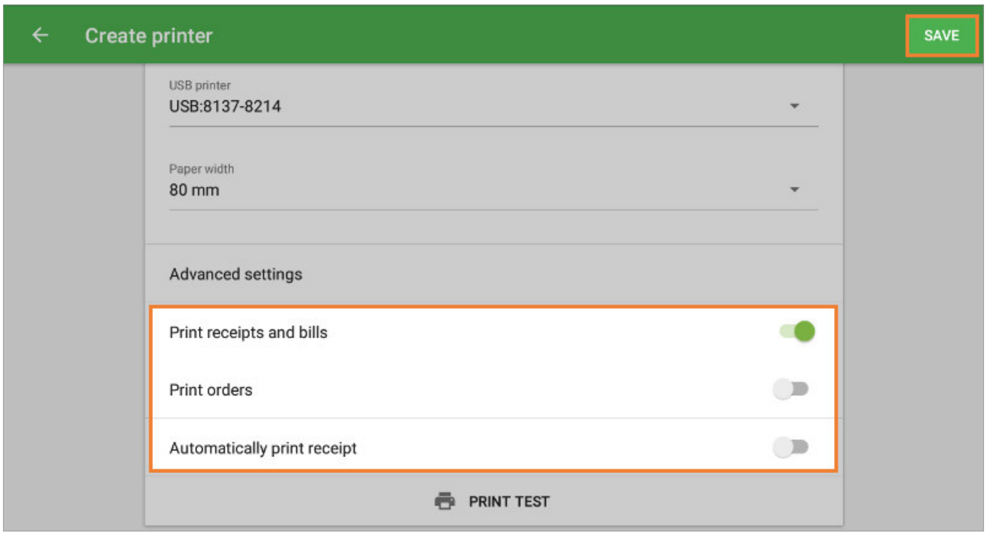


If a test receipt prints out successfully, then your printer is set up correctly.

7

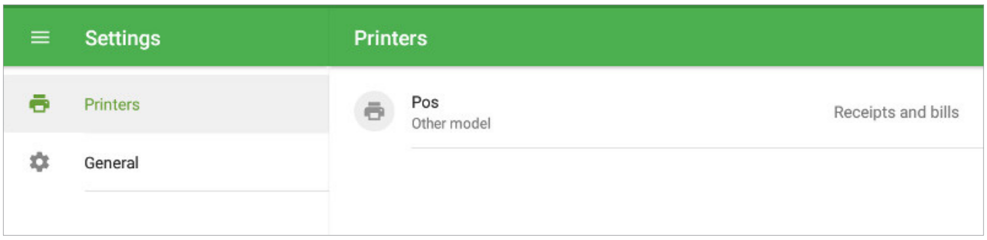
Choose the settings for your printer depending on how you want to use it. Don't forget to save all of the settings at the end, by tapping on the 'Save' button.

8



Now you can see your printer in the list. Nice work!

9



9.6 How to Set Up Other Printers in Loyverse POS

Loyverse POS works with receipt printers on the [Supported Printers list](). However, for Android, you can try to connect to models that are not on the Supported Printers list. But be aware that not every printer may work with Loyverse POS!

These are the general requirements for a receipt printer to be compatible with Loyverse POS on Android devices:

- support ESC/POS commands that are the same as Epson printers;
- have either Ethernet, WiFi, Bluetooth or USB interface;
- support the status commands or similar functions to check that the transmitted data has been completely printed.

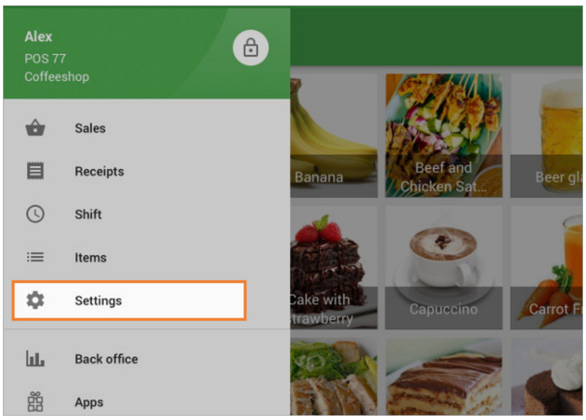
Consult the printer manual or the manufacturer website to see if your receipt printer fits these requirements. If so, the printer may work with Loyverse POS; however, there might be special cases.

Connect or pair your printer with a mobile device

For Ethernet printer: connect your mobile device to the Wi-Fi router and connect your Ethernet printer to the router via an ethernet cable (details: How to Set Up an Ethernet Printer in Loyverse POS).
For Bluetooth printer: pair a printer with your mobile device (details: How to Set Up Bluetooth Receipt Printer with Loyverse POS).
For USB printer: connect your mobile device to the USB printer via a USB cable and OTG adapter or cable (details: How to Set Up a USB Printer with an Android Device).

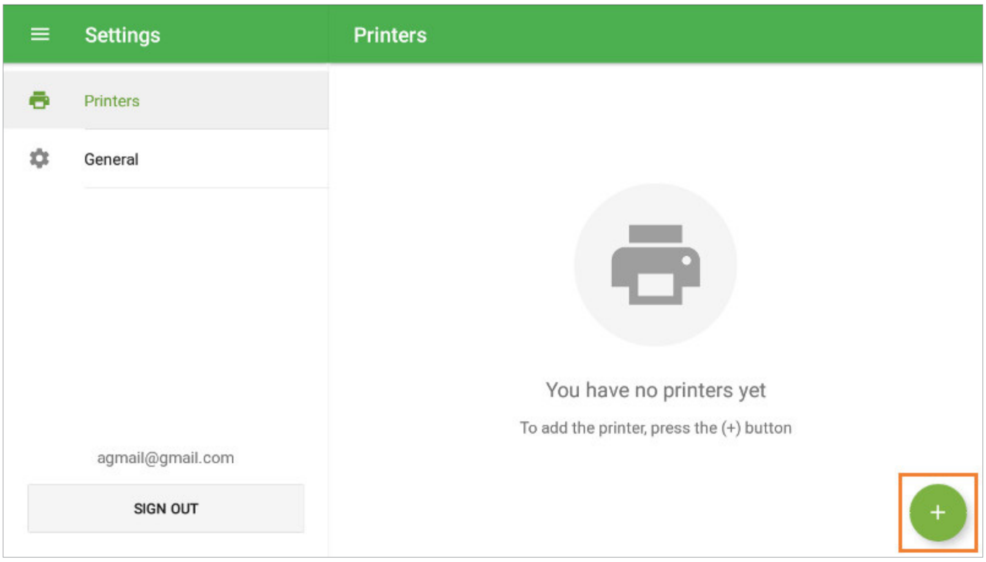
Then, in the Loyverse POS app, go to Settings.

1



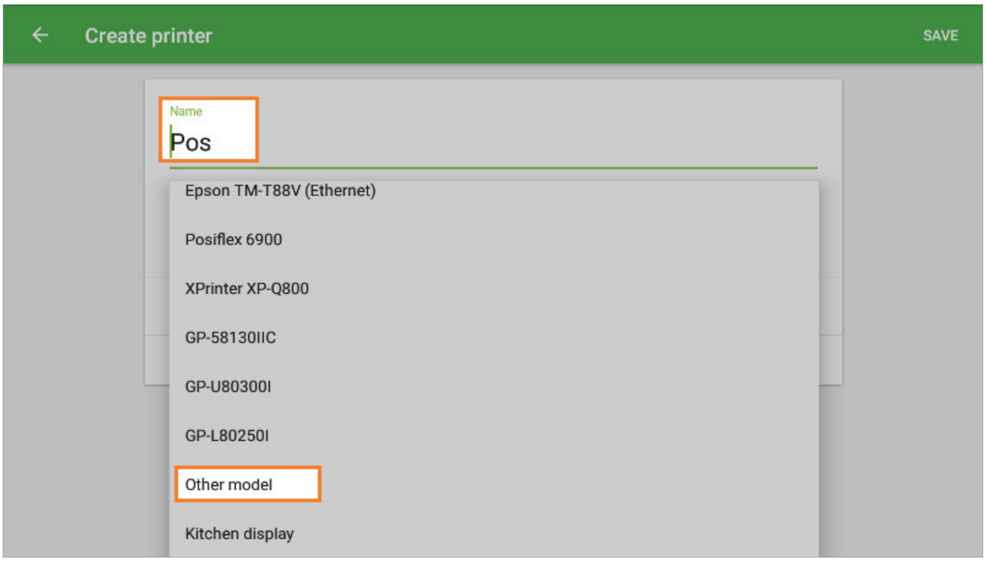
Create a printer by tapping on the '+' button.

2



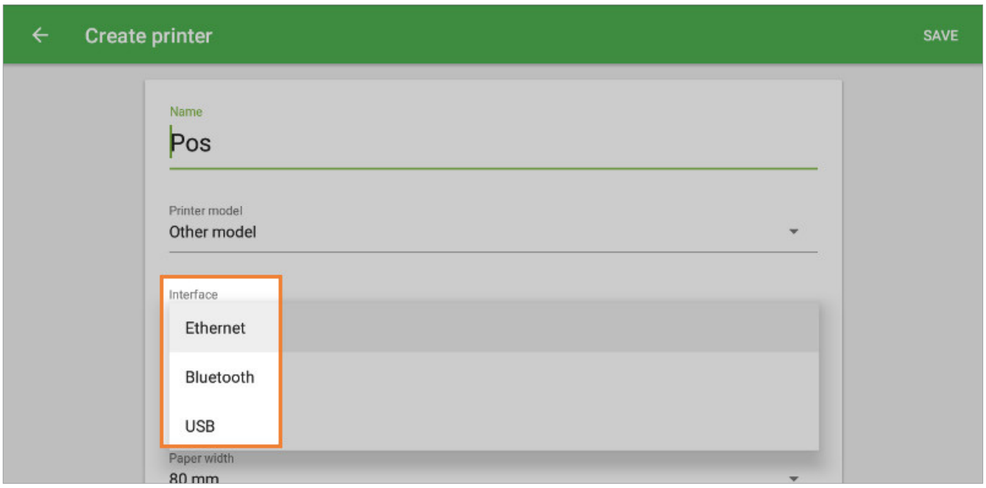
Name your printer in the 'Name' field and select 'Other model' from the drop-down list of printer model.

3



Select your printer interface in the 'Interface' field.

4

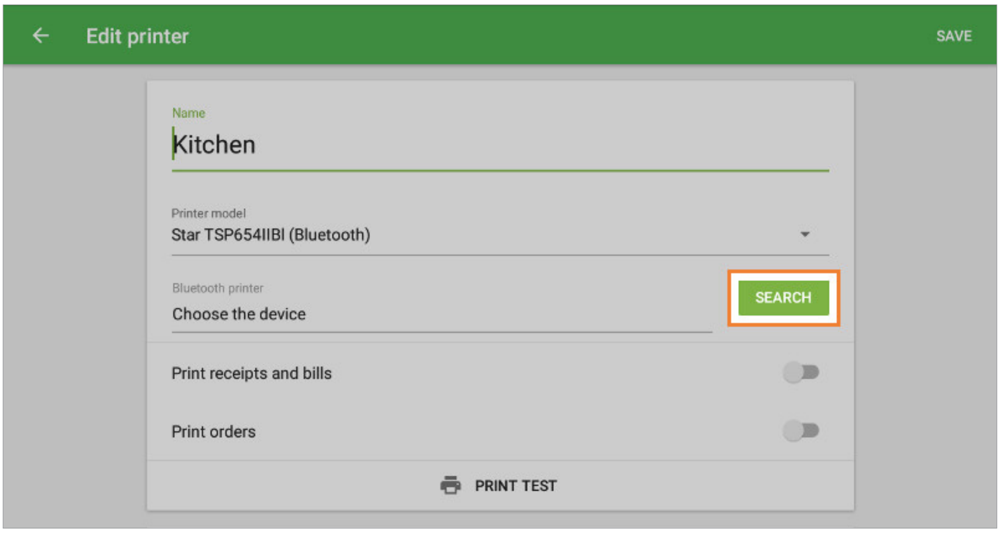


For Ethernet printer, fill in the 'Printer IP-address' field, which can be found in your printer's network configuration report (details: Troubleshooting When Setting Up an Ethernet Printer)

5

For Bluetooth printer, tap the 'Search' button to search for your printer and in the following pop-up window, select your printer.

6



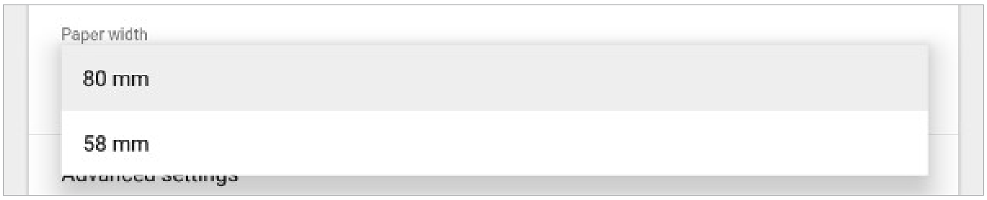
7

For USB printer, select your printer from the drop-down menu. USB Printers are named in USB: VID-PID format. VID stands for Vendor ID, and PID is the Product ID.

8

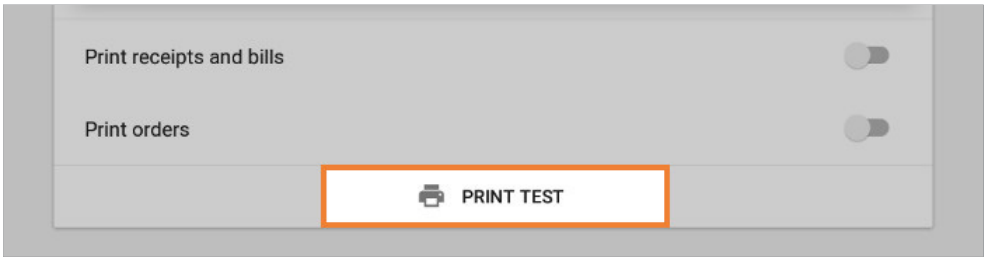
Chose the paper width of your printer.

9



Tap the ‘Print test’ button to check your printer’s connection with the Loyverse POS app.

10

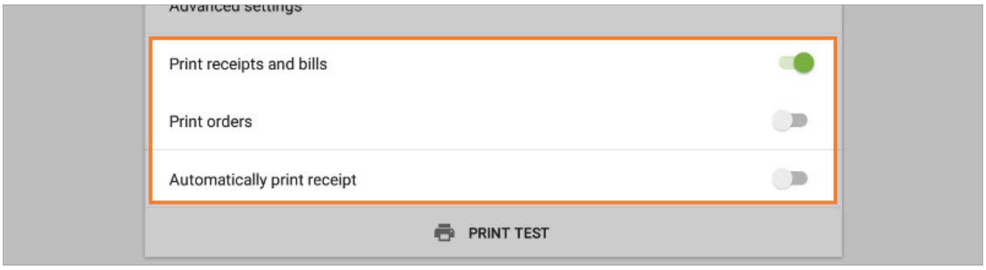


If a test receipt prints out successfully, then your printer is set up correctly.

11

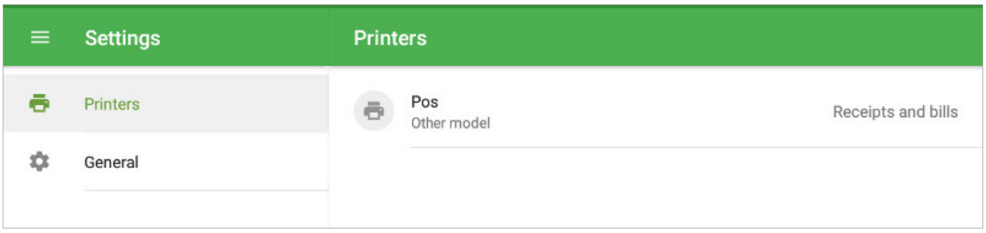
Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the ‘Save’ button.

12



Now you can see your printer on the list. You are ready to start selling and printing receipts or orders.

13



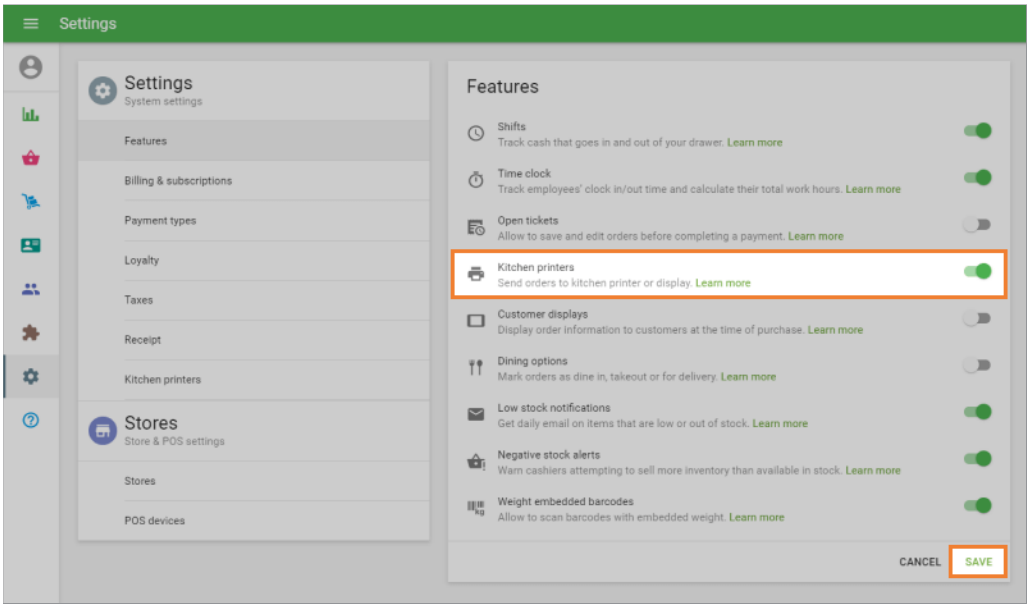
9.7 Using Kitchen Printers with Loyverse POS

Cafes and restaurants use kitchen printers to inform the cooking staff what to prepare from an order.

9.7.1 Configuring Loyverse Back Office

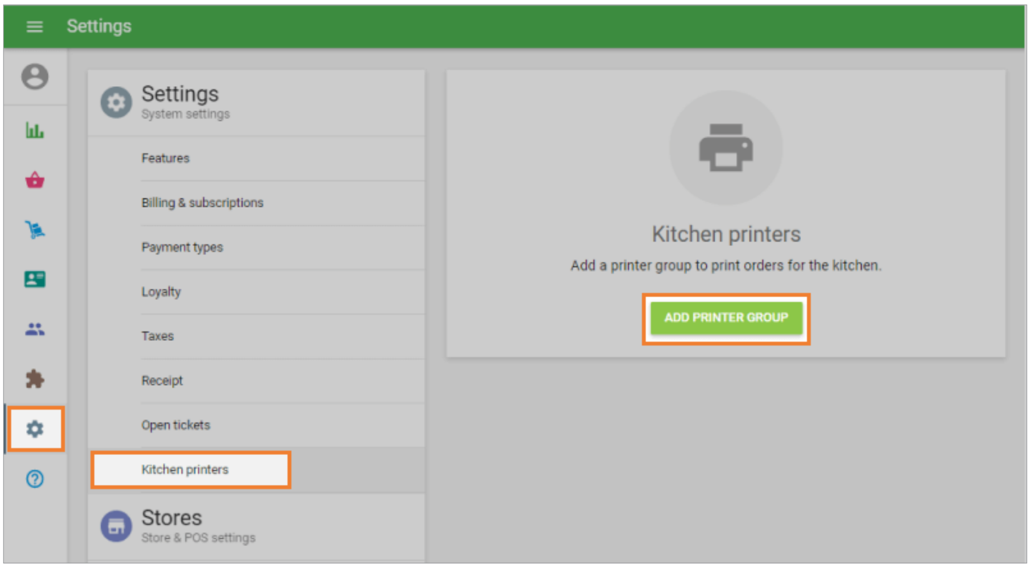
Log in to the Back Office, navigate to the Settings menu, Features section, and switch on the 'Kitchen Printers' slider.

1



Click the Kitchen Printers menu and create a printer group.

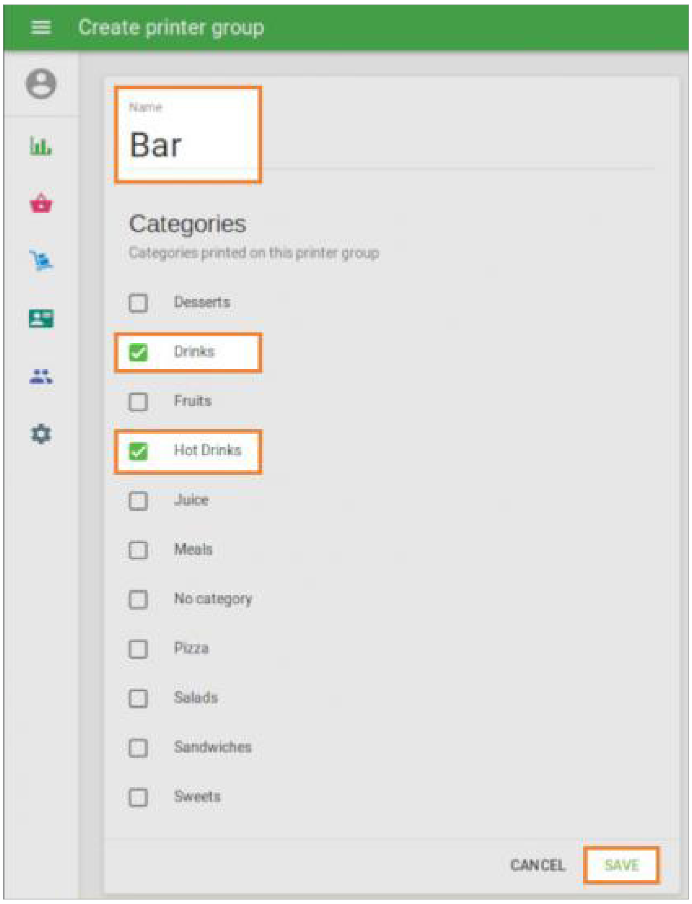
2



Give the printer group a meaningful name. A printer group typically corresponds to the printer location - bar, kitchen, kitchen station, etc. Therefore, the recommended practice is to use the printer location as the printer group name.

Tick item categories that should be included in this printer group and save your selection.

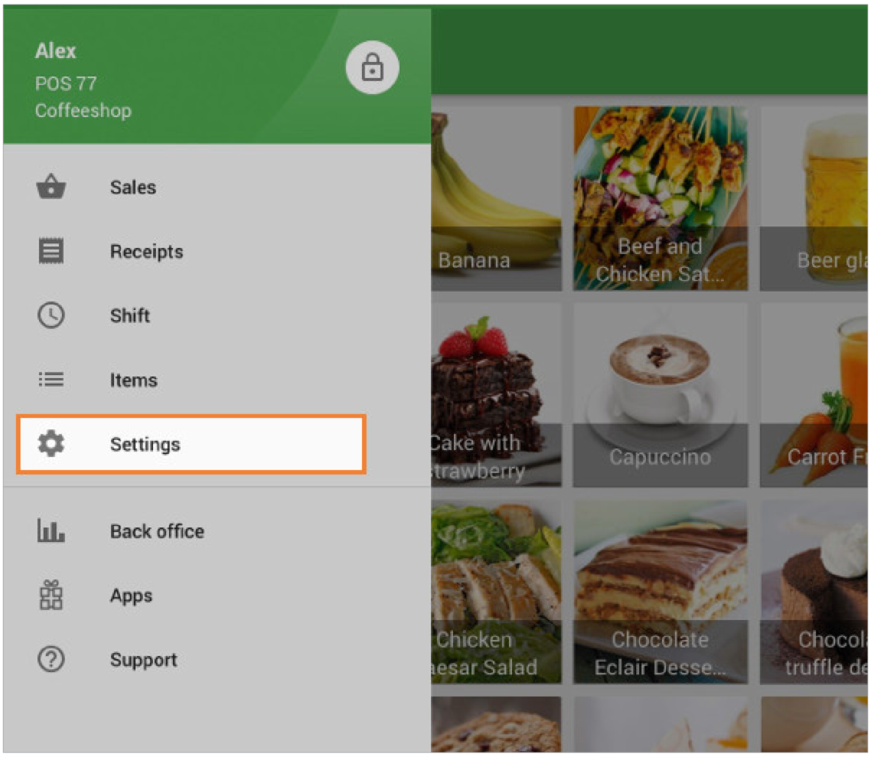
3



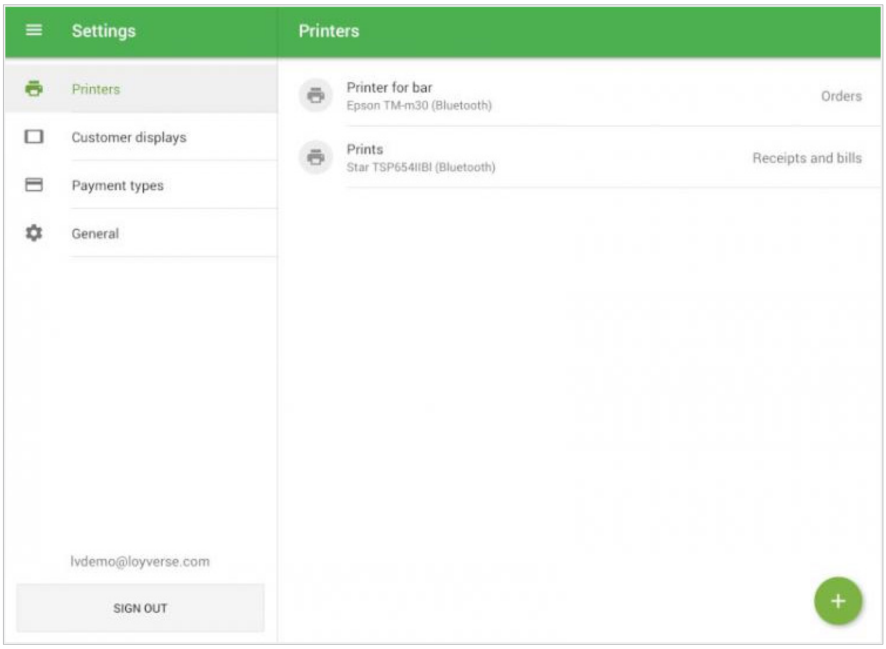
9.7.2 Setting Up the Loyverse POS App

Using the Loyverse POS app, assign an actual printer to a certain printer group.
Open the Settings menu and select the printer you will use to print the orders for the kitchen or add a new one. (How to set up Star ethernet printer in Loyverse POS)

1

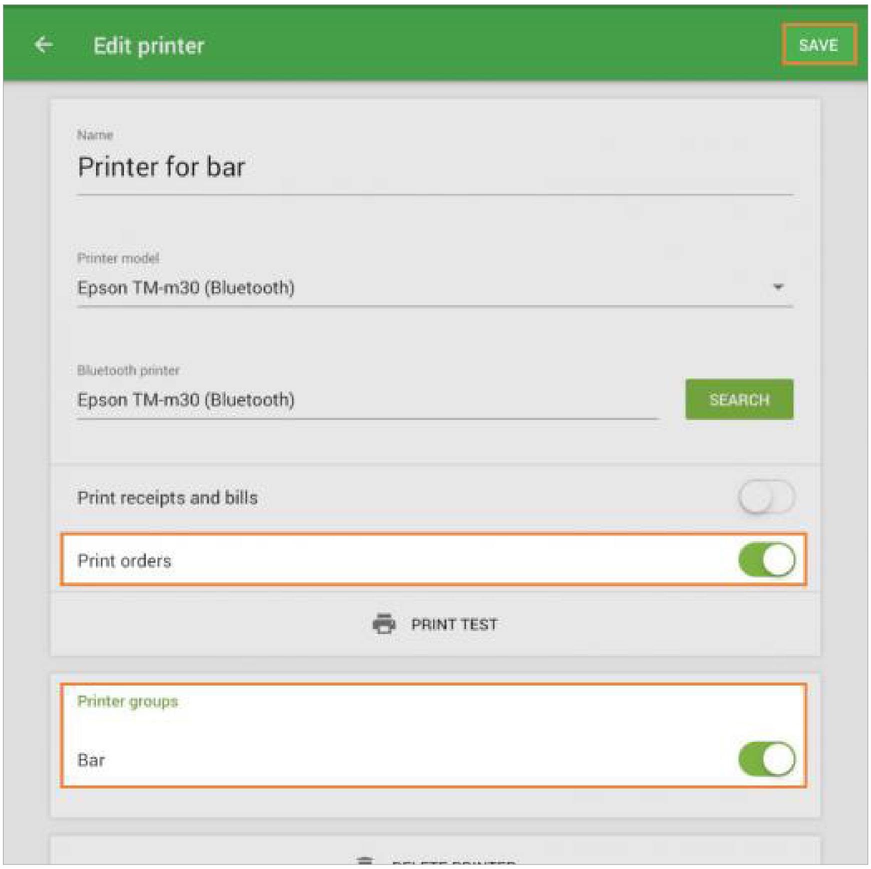


2



Specify that this printer will print orders. Switch on “Print orders”, select the proper printer group and save your settings.

3

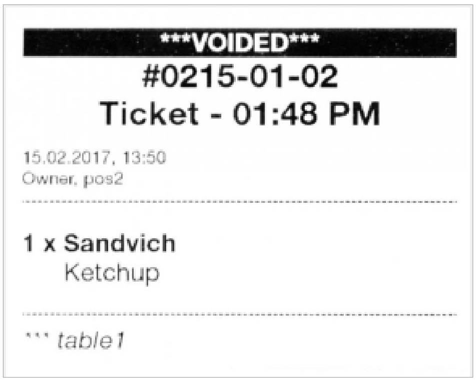


Now, when a customer orders, the kitchen printer automatically produces a ticket with the list of items to prepare. If you use open tickets, the kitchen ticket will print as soon as you save the open ticket.

4

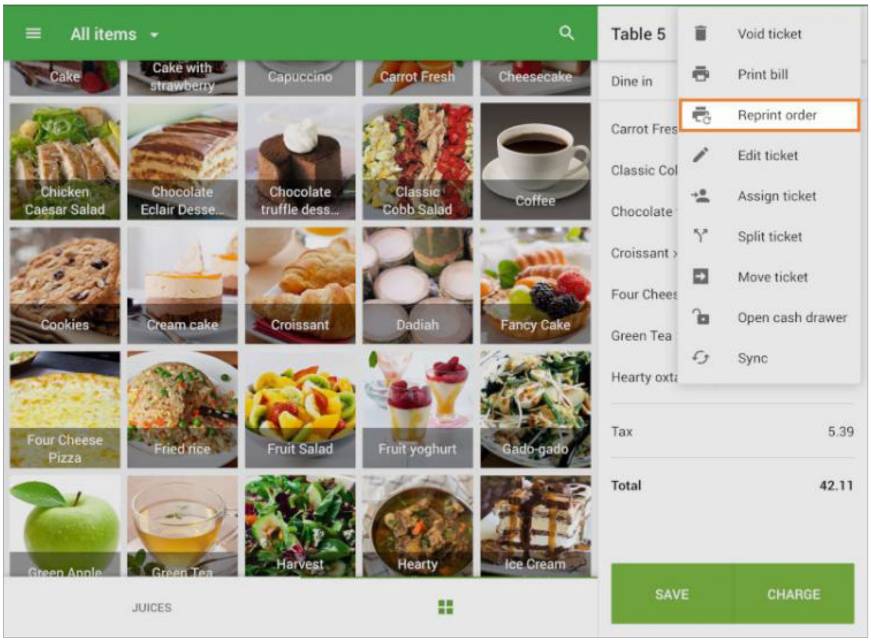
If you correct an open ticket by deleting or adding an item, the kitchen printer will print a corresponding ticket.

5



You can reprint the kitchen orders (for iOS only). To do this, open the saved ticket and tap 'Reprint order' from the three dots menu.

6

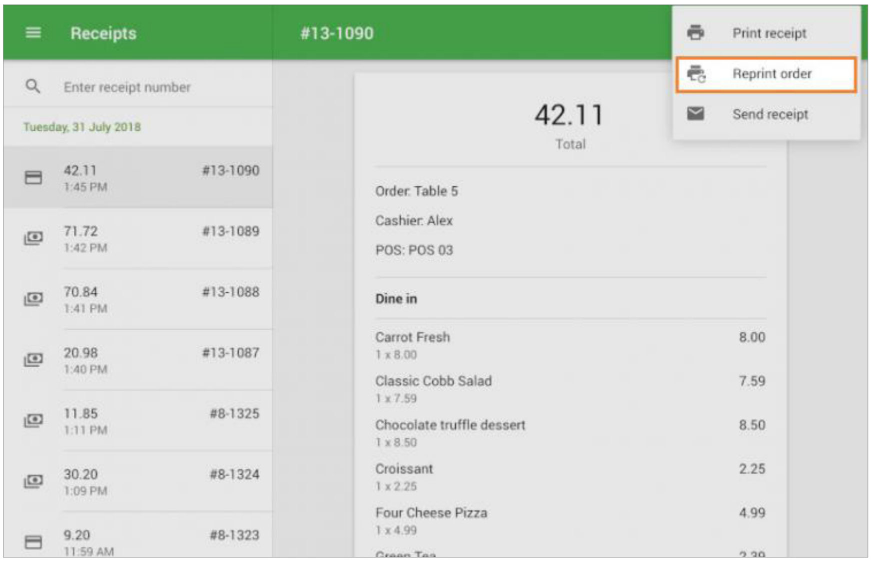


The kitchen printer will reprint the ticket with the mark 'Reprint'.

7

You can reprint the kitchen orders for 2 hours after closing the open ticket from the Receipts section.

8



9.8 Troubleshooting When Setting Up an Ethernet Printer

When you cannot set up an Ethernet printer with Loyverse POS, it's a good possibility that either the printer is experiencing a hardware issue, or you have a network related issue. We always recommend testing the printer for hardware issues before testing the network.

Testing hardware issues

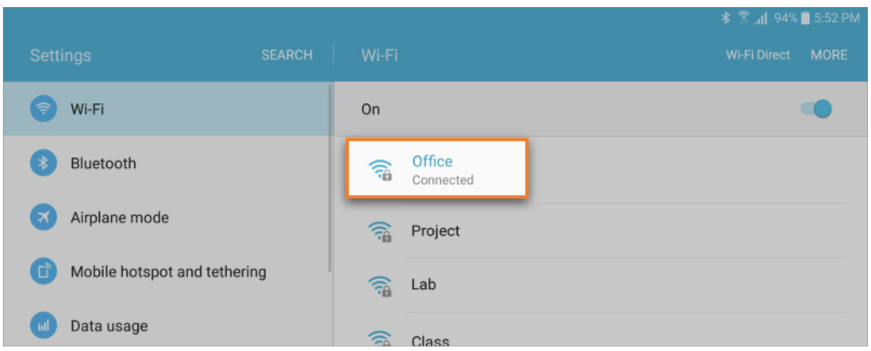
- Check that the paper is loaded and that there are no paper jams.
- Check the cable connections; both power and ethernet cables going from the printer and Wi-Fi router.
- Ensure that the printer and router power indication lights are on.
- Verify that the printer has no flashing lights or Red lights since this usually occurs with malfunctions.

Network related issues

1) Check if your mobile device is connected to the Wi-Fi network provided by the Wi-Fi router, plugged into the receipt printer.

In the settings on your mobile device check the network you are connected to.

1



If not connected to your Wi-Fi router, choose your Wi-Fi network to connect to it.

2) Next, verify that the receipt printer and the router are on the same subnet.

On your receipt printer, you need to print a network configuration report by following these steps:

- Turn the printer's power switch off
- Hold down the FEED button located on the front of the printer
- While continuing to hold the FEED button down, turn the power switch on
- The lights should flash for a few seconds, and then one or two pages should print out with a configuration report
- You can now release the FEED button

You can find the IP address of your printer under the "Current IP Parameters Status" section (underlined by orange below).

2

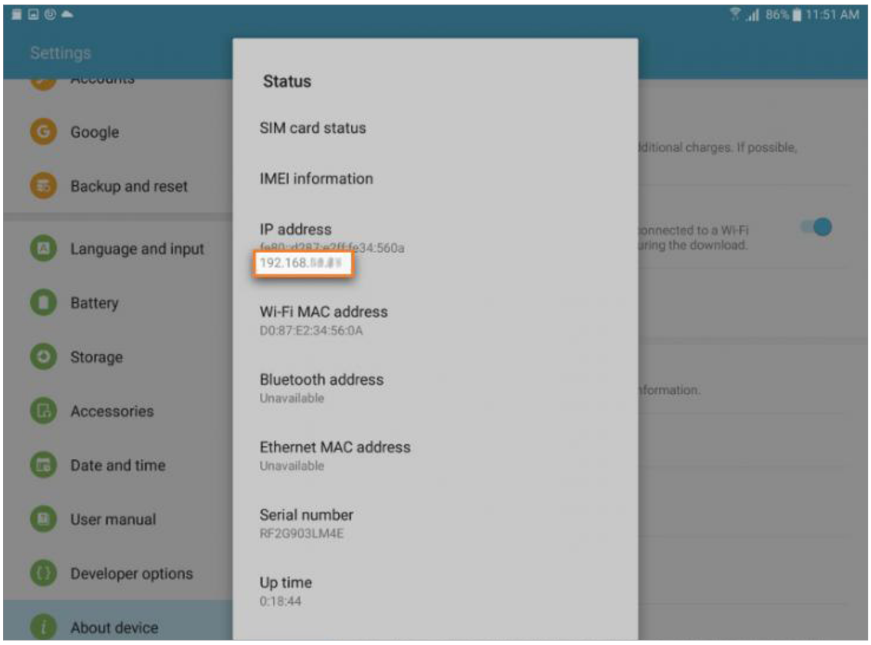
```
****************************************
        Network Configuration
****************************************

MAC Addr : 00:11:62:07:17:EA

IP Address               :0.0.0.0
Subnet Mask              :0.0.0.0
Default Gateway          :0.0.0.0
DHCP                     :ENABLE

"user" Login Password    :"guest"
"root" Login Password    :"********"
9100 Multi Session       :ENABLE
Disconnect Message       :ENABLE


****************************************
     Current IP Parameters Status
****************************************
IP Address      : 192.168.[illegible] (DHCP)
Subnet Mask     : 255.255.255.0
Default Gateway : 192.168.126.1
```

1. IP address of receipt printer

Then, you have to check the IP address of your router network. It is possible to do on your mobile device, connected to your router's Wi-Fi.

On **Android mobile devices**, go to Settings, and in the 'About device' menu, tap Status and check the IP address line.

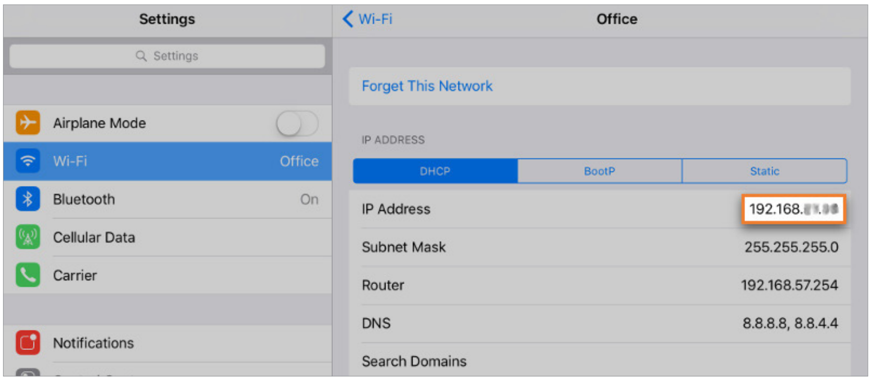
3



2. IP address of your router

On Apple mobile devices go to Settings and just tap your active Wi-Fi connection.

4



3. IP address of your router

Compare the two IP addresses: receipt printer 1 and router 2 or 3.

Both of the first three groups of numbers should be the same. If they are not, that means the two devices are on the different subnet.

You have to change the IP address either at the receipt printer or at your router. How to do it, refer to user manuals of these devices or contact your network administrator.

4th groups of numbers have to be different.

Note

Loyverse POS communicates with an Ethernet receipt printer via port 9100. If your printer has been set to another port, change the printer settings to port 9100. Refer to user manuals of a printer for information on how to do this.

9.9 Connecting Built-in Printers on Sunmi Devices

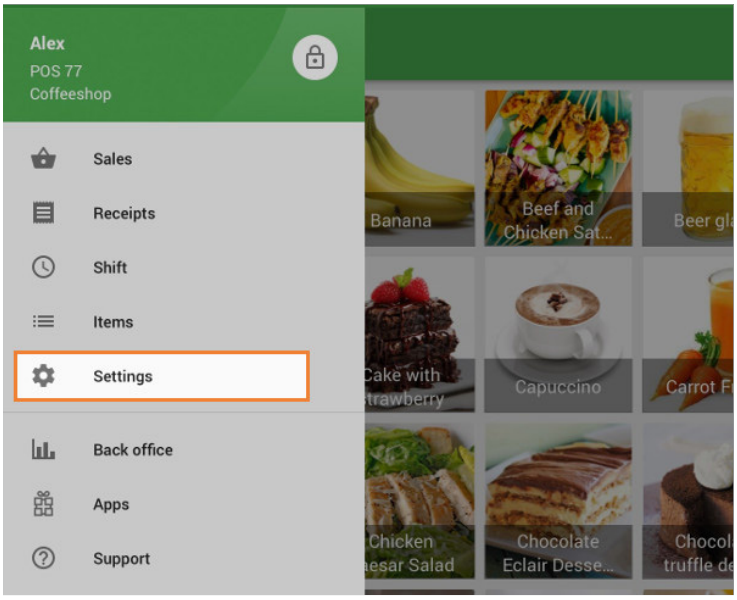
Loyverse POS app for Android is compatible with built-in printers on Sunmi devices.

The list of supported Sunmi devices:

- Sunmi V1
- Sunmi V1S
- Sunmi V2
- Sunmi V2 pro
- Sunmi T1 mini
- Sunmi T2 mini
- Sunmi D2 mini
- Sunmi T2 (**Note:** The second screen on this device will not work as the customer display (CDS).)
- Sunmi S2 (**Note:** The second screen on this device will not work as the customer display (CDS).)
- Sunmi M2

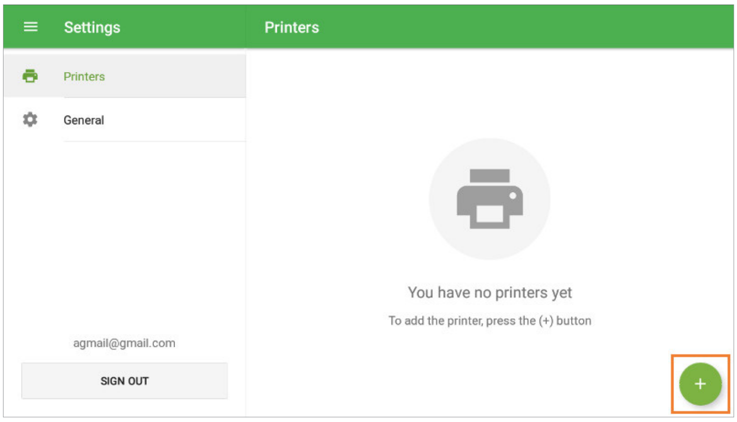
To connect internal printer on SUNMI device, start the Loyverse POS app and go to Settings.

1



Create a printer by tapping on the ‘+’ button.

2

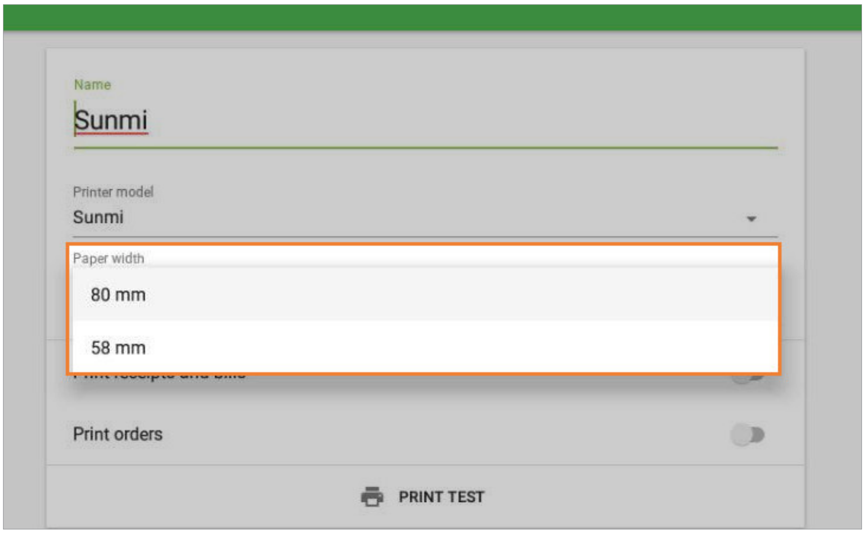


Type the title of your printer in the ‘Name’ field and select SUNMI from the drop-down menu of printers models.

2

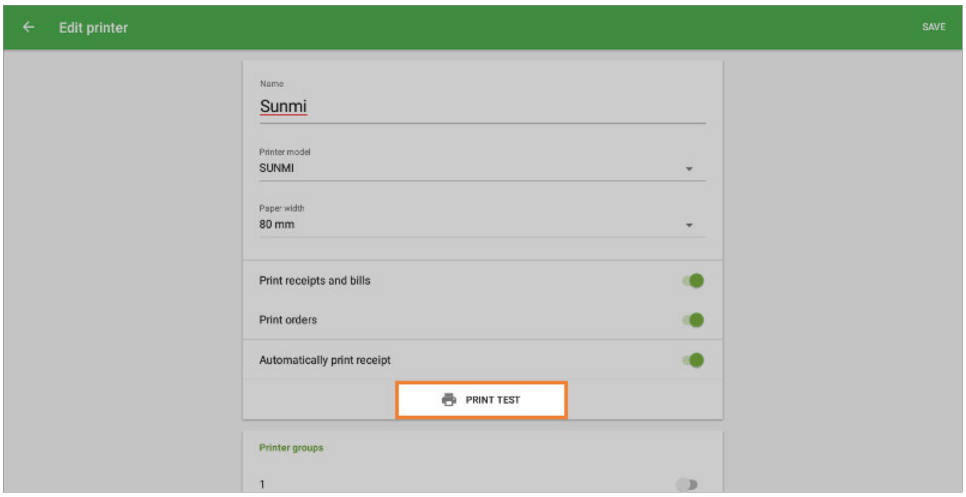
Select ‘Paper width’ of the printer.

3



Tap the ‘Print test’ button to test your printer’s connection with the Loyverse POS app.

4

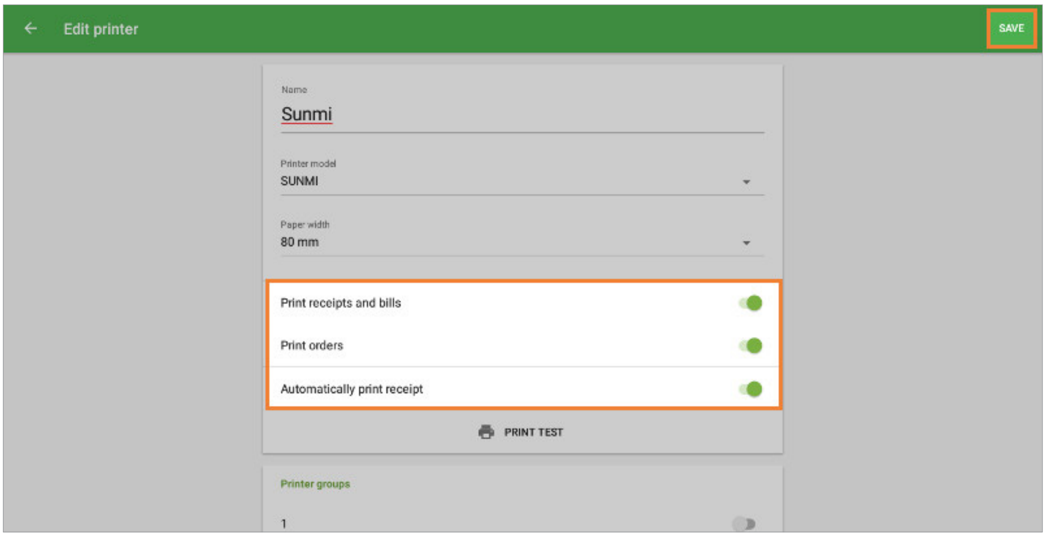


If a test receipt prints out successfully, then your printer is set up correctly.

5

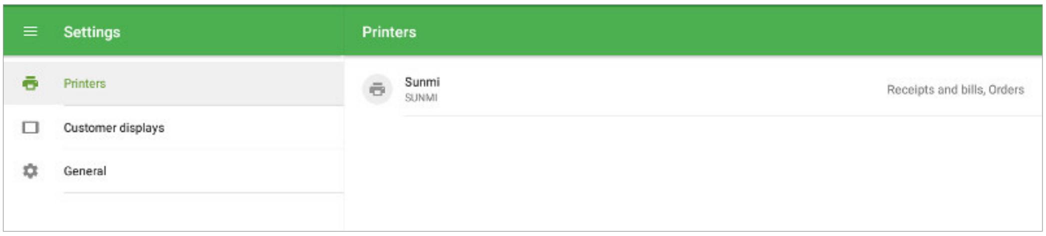
Choose the settings for your printer, depending on how you want to use it. Don't forget to save all of the settings at the end, by tapping on the ‘Save’ button.

6



Now you can see your printer in the list.

7



Note

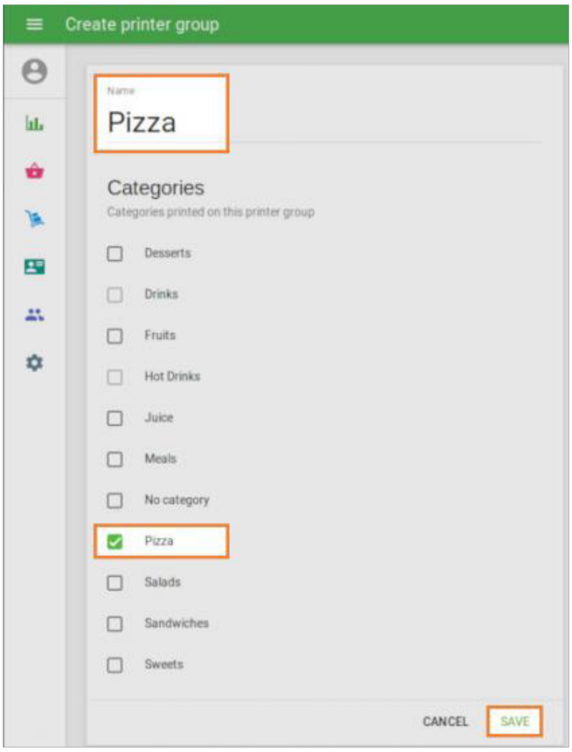
It is impossible to connect and print receipts from other mobile devices at the built-in printer of Sunmi device.

9.10 How to Set Up Kitchen Printer for Each Kitchen Station

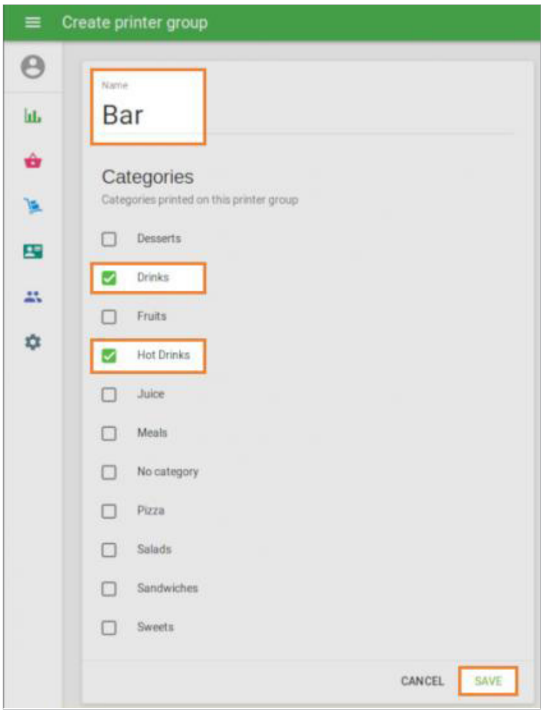
Before Setting Up: The 'Use Kitchen Printers' option should be activated in your Back Office (see Using Kitchen Printers with Loyverse POS), and printers should be set up in the Loyverse POS app (see How to set up Star ethernet printer in Loyverse POS).

If you want to set up a separate kitchen printer for each kitchen station, create printer groups and assign categories to them in the Back Office.

1

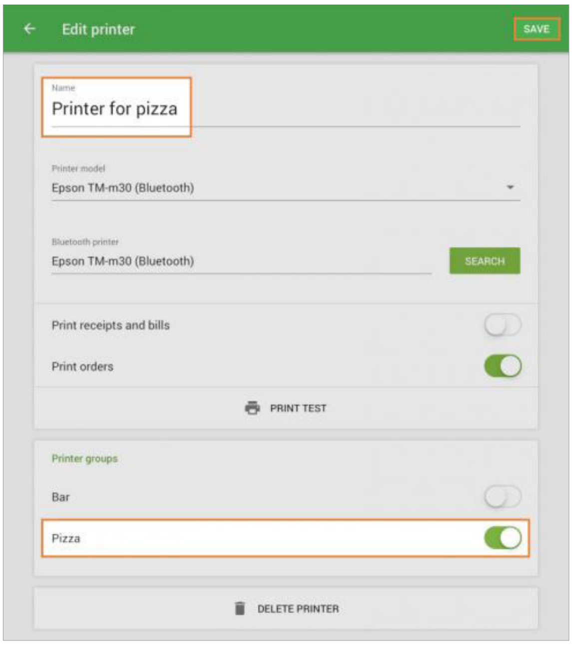


2

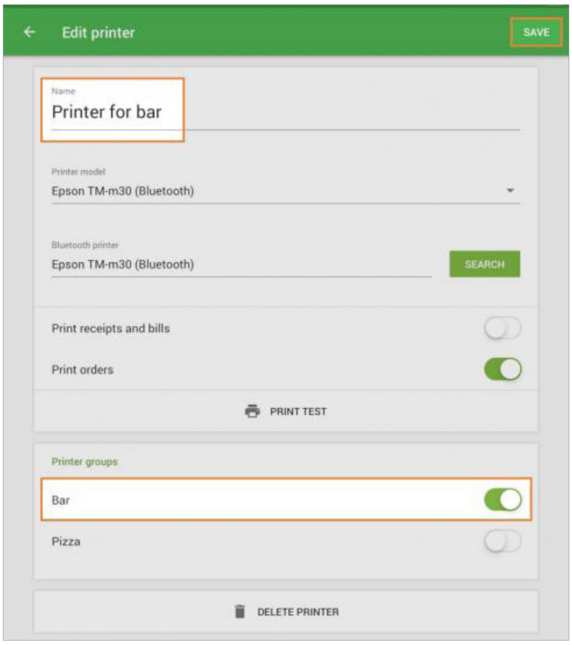


On the Loyverse POS app, assign each printer to its own printer group.

3

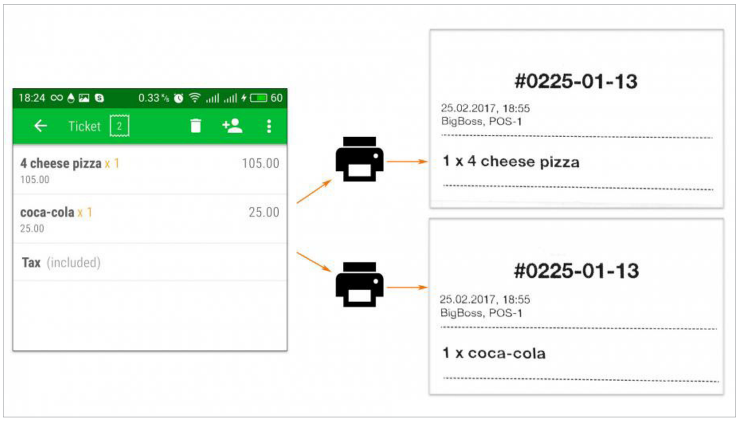


4



Now, when a customer orders, two kitchen printers produce tickets with the list of items from their categories.

5

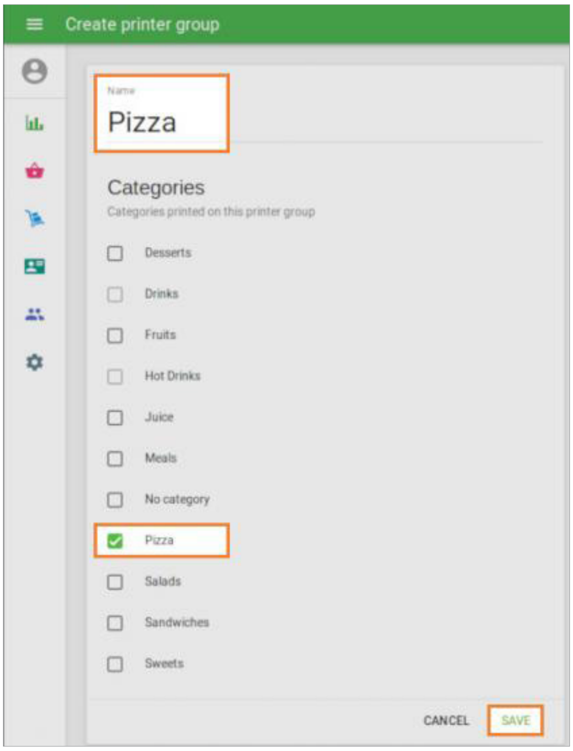


9.11 How to Set Up Multiple Kitchen Stations to Share One Printer

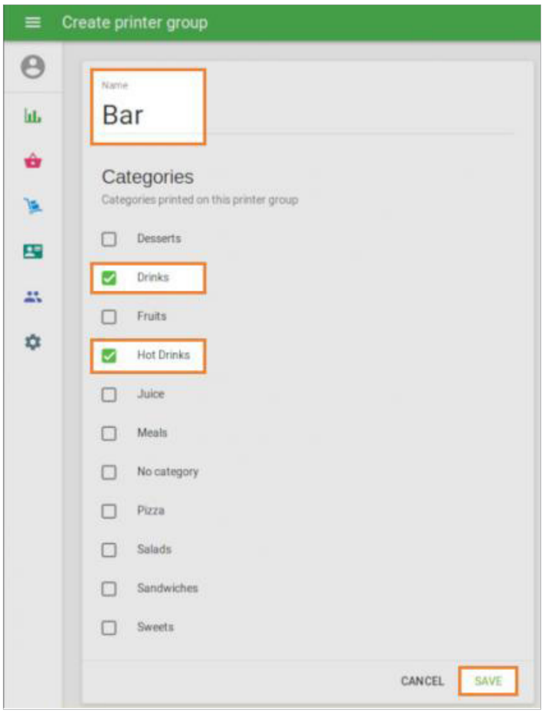
Before Setting Up: The 'Use Kitchen Printers' option should be activated in your Back Office (see Using Kitchen Printers with Loyverse POS), and printers should be set up in the Loyverse POS app (see How to Set Up Ethernet Printer in Loyverse POS).

If you want to print tickets from multiple kitchen stations with one printer, create a few printer groups and assign categories to them in the Back Office.

1

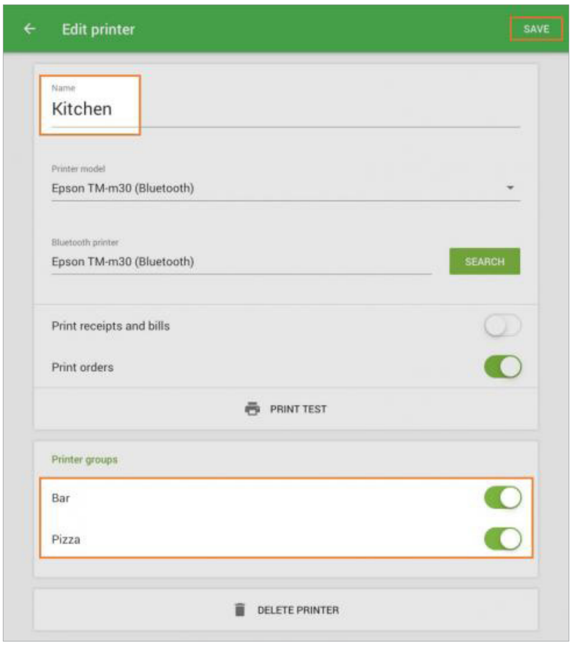


2



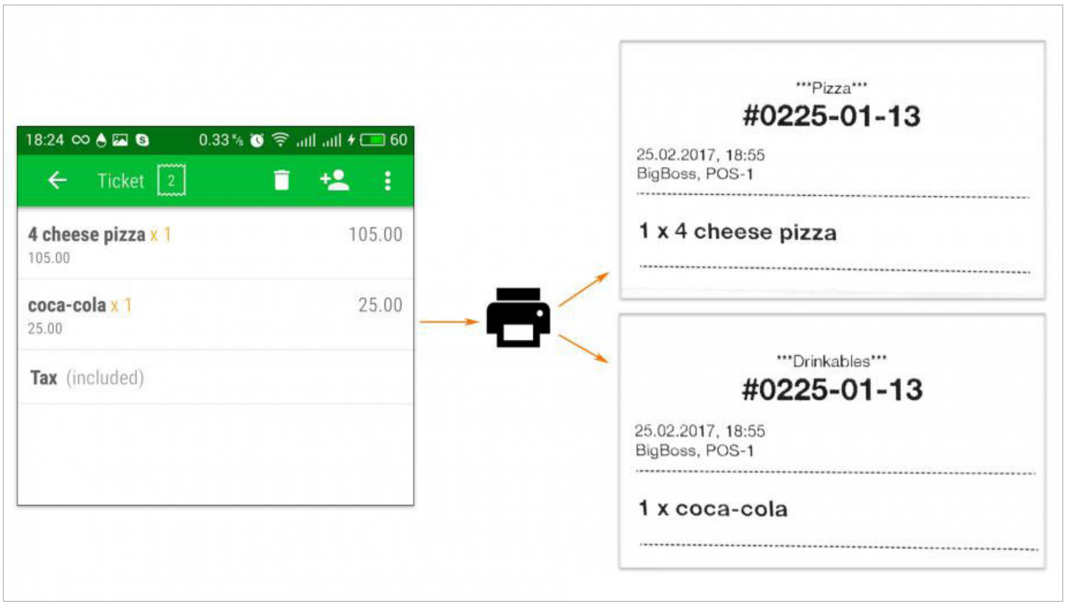
On the Loyverse POS app, assign each individual printer to both printer groups.

3



Now, when a customer orders, the kitchen printer will create two tickets for both kitchen stations with their own list of items.

4



9.12 How to Connect Kitchen Printer Bell (Buzzer)

A bell (buzzer) can be connected to your kitchen printer to attract the attention of the cooking staff to the printed order.

Most of the receipt printers have a special cash drawer socket, usually of RJ11 type. Refer to your receipt printer and kitchen printer bell (buzzer) manuals to make sure they are compatible. As long as they are, and the receipt printer is supported by Loyverse POS, such kitchen printer bell (buzzer) can be used with Loyverse POS as well.

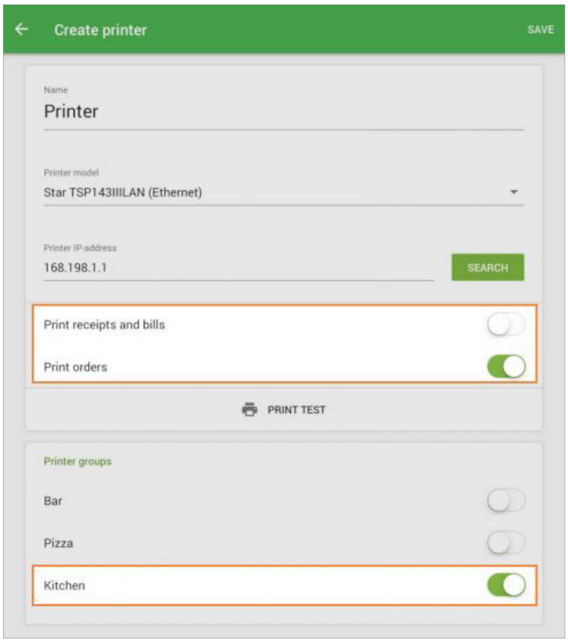
Before connecting a bell, make sure that your kitchen printer has been paired with Loyverse POS. Also in the Back Office settings, the 'Use Kitchen Printers' option has to be on, and the printer group has to be created with the associated categories of items.

In your printer settings in the POS switch on the 'Print orders' option and some printer groups.

Note

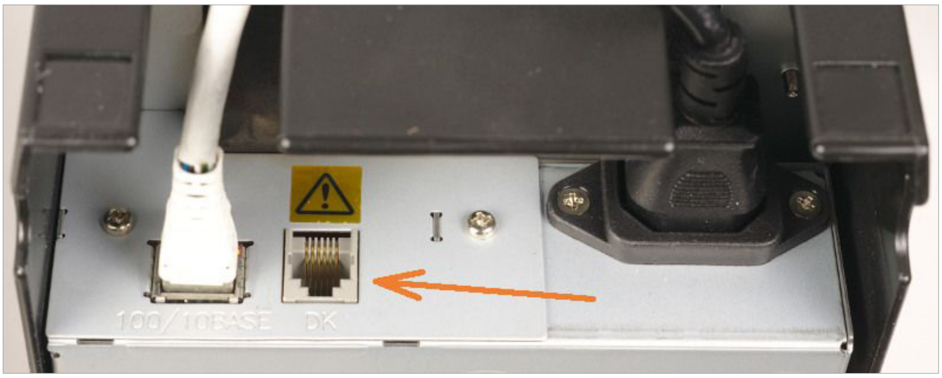
If you use the printer to 'Print receipts and bills' and 'Print Orders', the RJ11 socket will work only to open the cash drawer and will not work to ring the bell.

1



Find the RJ11 socket on your receipt printer.

2

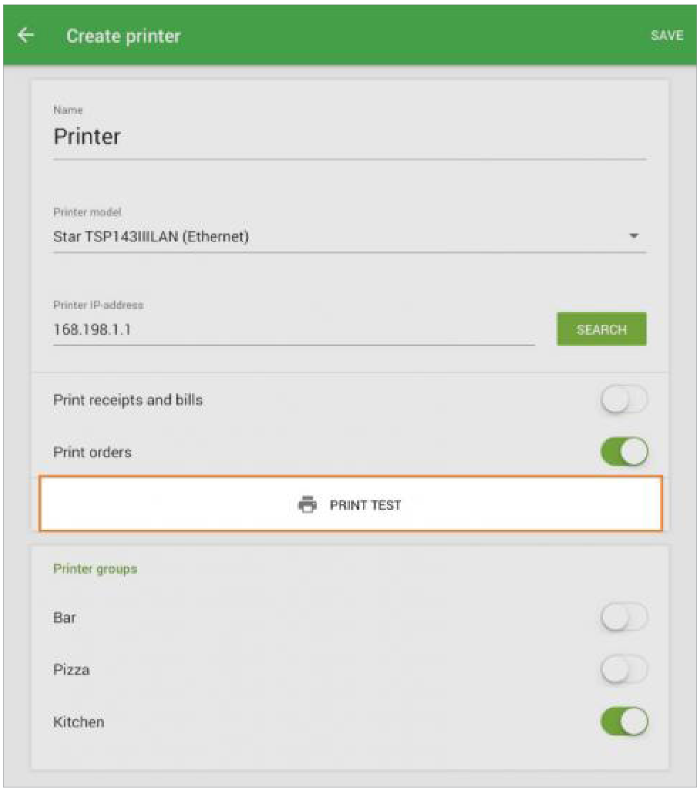


Plug the bell (buzzer) cable into the socket.

3

Turn on the printer and tap ‘Print test’ to make sure that all the settings are correct.

4



The kitchen printer bell (buzzer) will ring before the test order is printed.

5

After all the settings are completed, the kitchen bell (buzzer) will ring every time the order is printed in the kitchen. Also, the bell (buzzer) will ring when the printed order is cancelled.

9.13 Supported Barcode Scanners

Loyverse POS for Android works with scanners supporting HID protocol. You can use scanners with Bluetooth interface or USB scanners via a USB OTG adapter/cable.
Loyverse POS on IOS devices supports only following scanner models:

- Socket Mobile 7Ci
- Socket Mobile 7Qi
- Socket Mobile S700
- Socket Mobile S740
- Socket Mobile S800
- BCR-POP1 - mPOP scanner only connected through mPOP printer

9.14 How to Connect a USB Barcode Scanner to an Android Device

If your Android smartphone or tablet supports a USB on-the-go, or OTG, you can use a USB barcode scanner with the Loyverse POS app.

To use a USB scanner with Loyverse POS on an Android device, you will need a USB OTG adapter or cable. It has a female USB connector on one end and a male micro USB connector on the other.

1

First plug the USB barcode scanner to the female USB connector of an OTG adapter or a cable.
Then plug the the micro-USB end of the OTG adapter or cable into the micro-USB port of your mobile device and wait for the system to recognize the scanner.

2

Now you can add barcodes to your items and sell items with a barcode scanner.

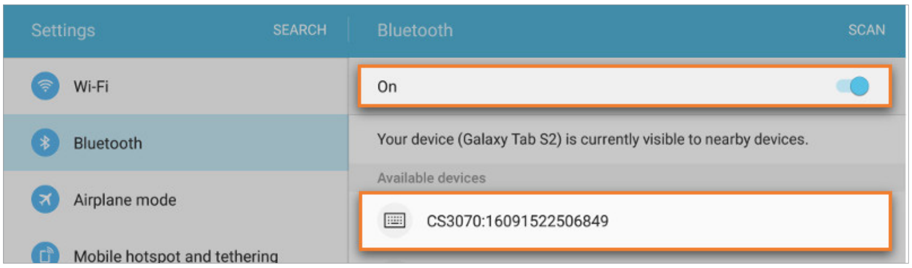
9.15 How to Setup Motorola CS3070 (Bluetooth) Barcode Scanner

Press the scan button (+) to wake the scanner.

Press and hold the Bluetooth button (round button) for five seconds. The scanner beeps and the Bluetooth button starts blinking quickly to indicate that the scanner is discoverable by the host.

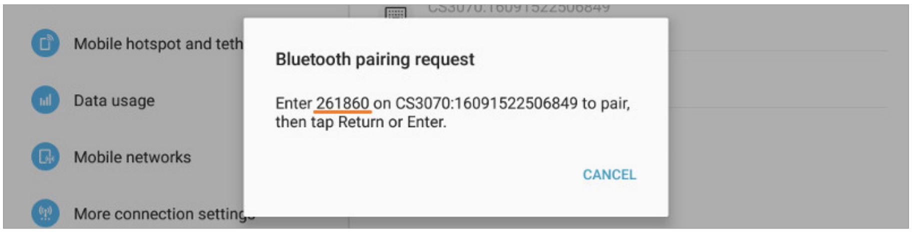
On your mobile device, turn on Bluetooth and let it search for devices. You will see your scanner in the list.

1



Select the CS3070 from the discovered device list. The Bluetooth application will prompt you to scan the pass key it generated.

2



Scan Numeric Barcodes corresponding to the pass key, one by one, then scan the Enter code.

3

0 6

1 7

2 8

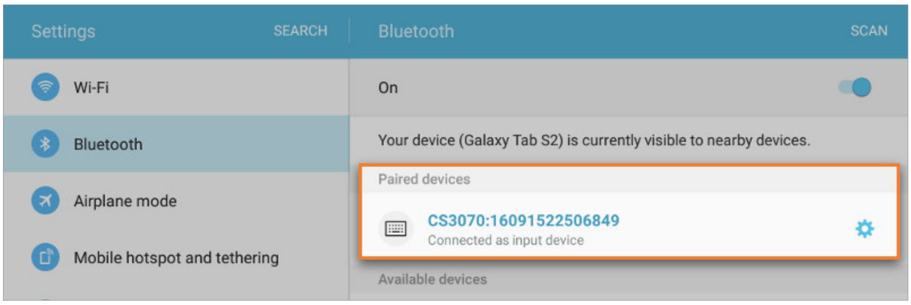
3 9

4 Enter

5

The Bluetooth button blinks slowly to indicate that the scanner is paired with the host.

4



Now, in your Loyverse POS app, go to the ‘Sales’ menu. When you scan the item with a barcode, this item will be added to the ticket.

9.16 Socket 7Qi/7Ci (Bluetooth) Barcode Scanner Setup

9.16.1 Connecting scanner to Android Mobile Device

When working with the Loyverse POS app on your Android Mobile Device, the Socket 7Qi/7Ci (Bluetooth) scanner should be connected in the Human Interface Device (HID) Basic Mode.

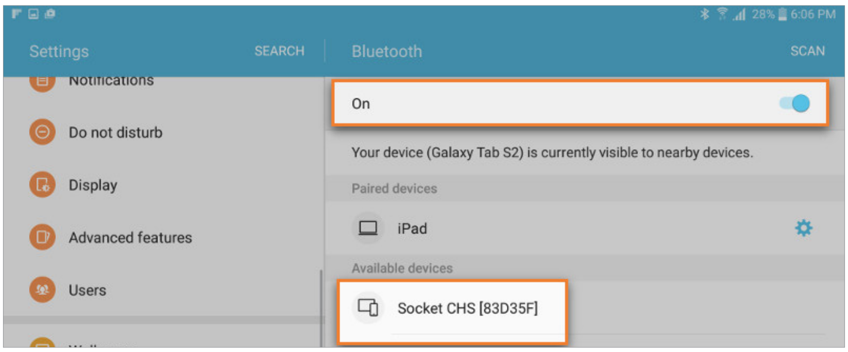
Power on the scanner and configure it to the connection mode by scaning this barcode:

1

#FNB00F40000#

Turn Bluetooth on in your device. Go to Settings > Bluetooth. A Bluetooth Device search will begin.
You will see your scanner in the list.

2



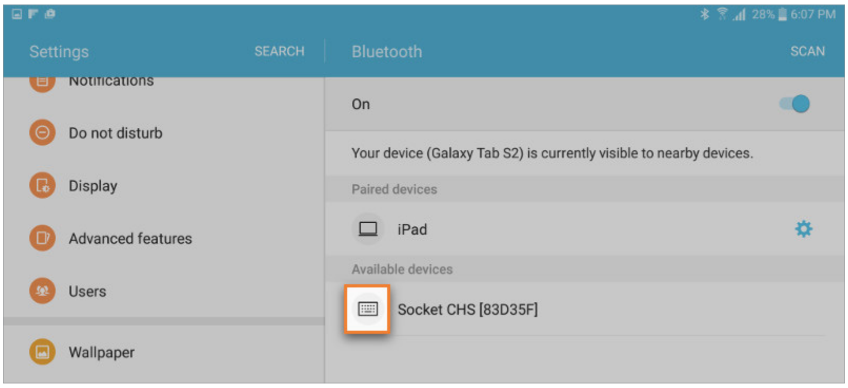
Configure the scanner to Human Interface Device (HID) Basic Mode, as Keyboard class device, by scanning this barcode:

3

#FNB00F40001#

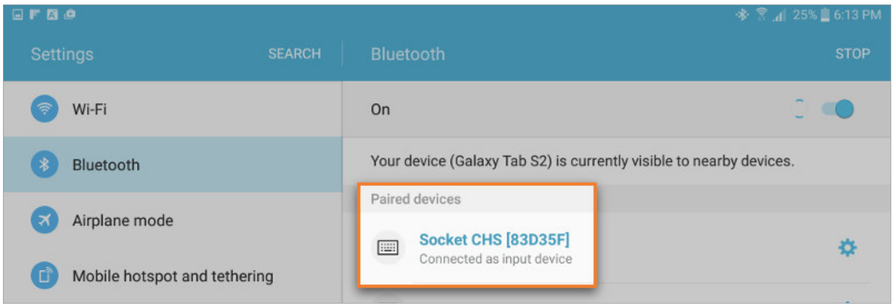
The scanner icon will be changed to the keyboard.

4



Tap on your Socket scanner in the list of Devices. After a few seconds, the “Not Paired” status will change to “Connected” or “Paired” and the scanner Blue LED will start blinking every 3 seconds, confirming the connection.

5



Now, in your Loyverse POS app, go to the ‘Sales’ menu. When you scan the item with a barcode, this item will be added to the ticket.

9.16.2 Connecting scanner to Apple iOS device

When working with the Loyverse POS app on the Apple iOS device Socket 7Qi/7Ci (Bluetooth) scanner should be connected in Application Mode.

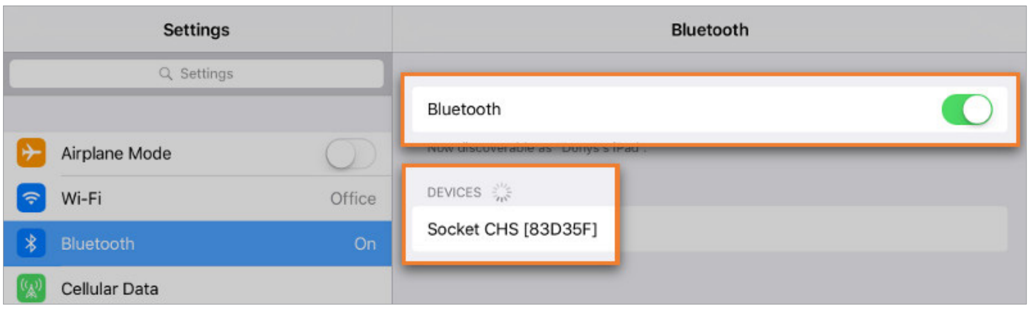
Power on the scanner. To change the profile to Application Mode, scan this barcode:

1

#FNB00F40002#

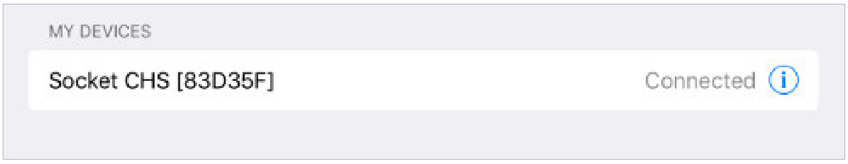
Turn on Bluetooth on the Apple device. Go to Settings > Bluetooth.
The bluetooth device search will begin.

2



Tap on your Socket scanner in the list of Devices found. After a few seconds the “Not Paired” status will change to “Connected” or “Paired” and the scanner’s blue LED will blink every 3 seconds, confirming the connection.

3



Now in you Loyverse POS app, go to the ‘Sales’ menu. When you scan the item with the barcode, this item will be added to the ticket.

9.17 Supported Cash Drawers

Loyverse POS can support printer-driven cash drawers, which means a cash drawer is connected to a printer, which in turn is connected to Loyverse POS. Therefore, you can use any cash drawer which can be driven by your receipt printer. Please consult cash drawer manual or manufacturer website to see if your cash drawer is compatible with your receipt printer.

Note

Receipt printer and cash drawer should have the same voltage of power supply 12 or 24 V. If they have different voltage they will not be compatible.

9.18 How to Connect a Cash Drawer

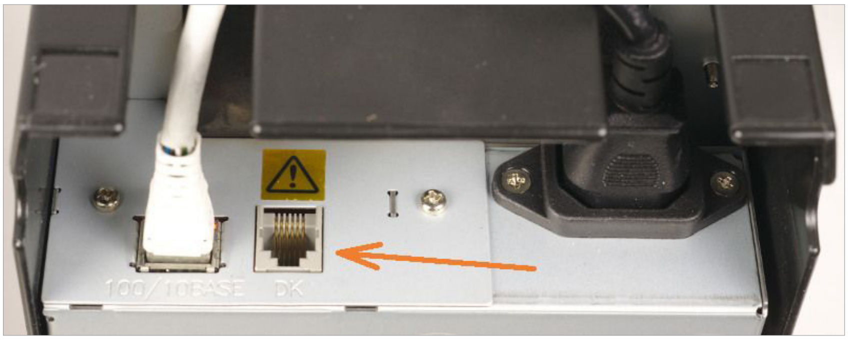
A cash drawer connects to your receipt printer, and is triggered to open automatically when you finish a cash sale.

Most of receipt printers have a special cash drawer connector, usually of RJ11 type. Refer to your receipt printer and cash drawer manuals to make sure they are compatible. As long as they are, and given the receipt printer is supported by Loyverse POS, such cash drawer can be used with Loyverse POS as well.

Before connecting a cash drawer, your printer should be paired with Loyverse POS using the Print Receipts and Bills option in your app settings.

Find the cash drawer socket on your receipt printer.

1



Plug the cash drawer cable into the socket.

2

Turn the printer on and ring up a cash sale using the Loyverse POS app. The cash drawer will open when the sale is completed.

3

A cash drawer also opens when:

- A refund receipt is printed for cash refunds only
- Opening shifts for employees to enter the initial cash amount
- Closing shifts for employees to calculate the final cash amount
- ‘Pay In’ and ‘Pay Out’ actions performed to put money into or take from the cash drawer
- Using the ‘Print test’ option to test your printer’s connection with the Loyverse POS app

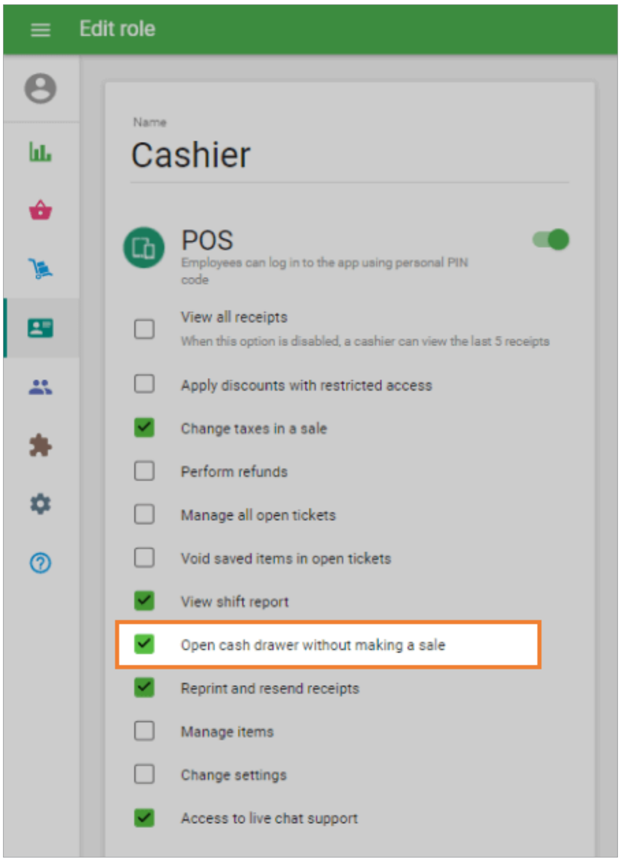
Note

Cash drawers APG: Vasario 1416 and Vasario 1616 should be connected with receipt printer only through the cable CD 102 A.

9.18.1 How to open cash drawer without making a sale

You can set the right to open cash drawer without making a sale for your employee group. Go to ‘Access rights’ menu at the ‘Employee' section in the Back Office and open the group for the editing. Check the box ‘Open cash drawer without making a sale’ in the ‘POS’ section.

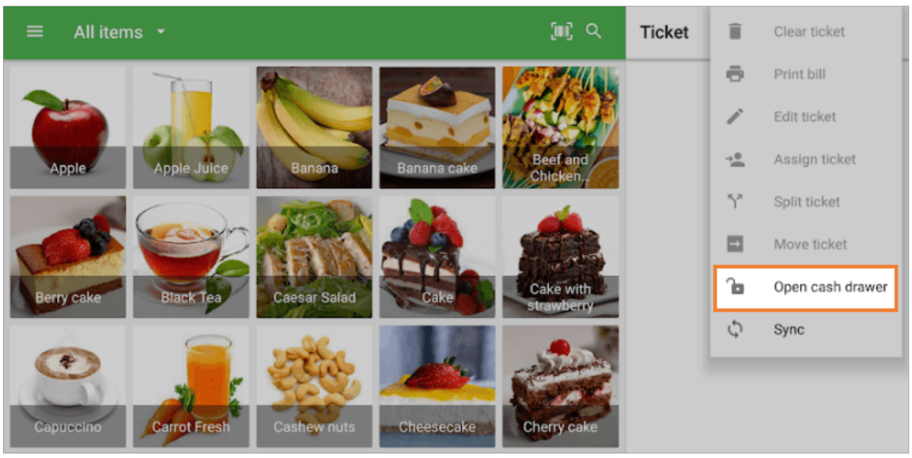
1



Don’t forget to save.

You can find the ‘Open cash drawer’ button in the three vertical dots (⋮) menu at the Sale screen of your POS.

2



Note

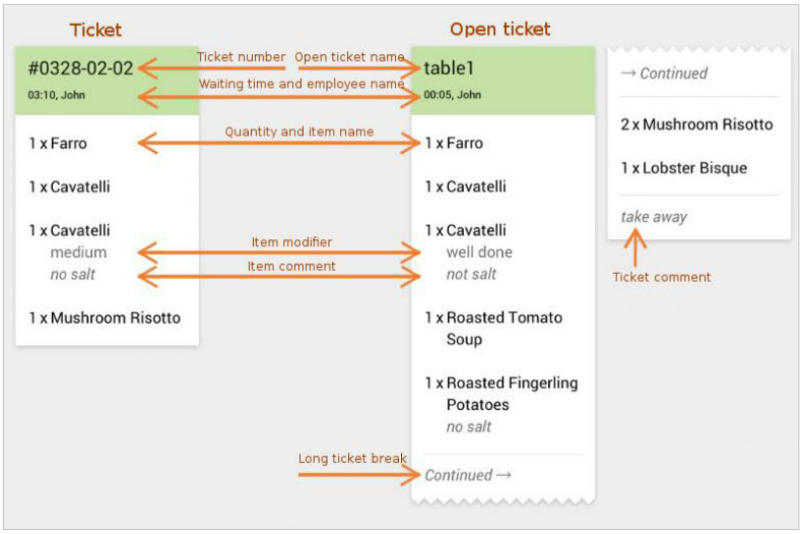
The button ‘Open cash drawer’ is displayed only if there is at least one printer connected with the option ‘Print receipts and bills’.

9.19 How to Use Loyverse KDS Kitchen Display

Please refer to the Loyverse KDS setup guide and make sure you Loyverse KDS app is configured properly and test orders appear on kitchen display.

Now that you have Loyverse KDS set up, customer orders will appear on your kitchen display(s) as tickets with the list of items to prepare.
The first line of a ticket header contains either ticket number or ticket name for saved open tickets. Then there is time since the order was created and server's name.

1

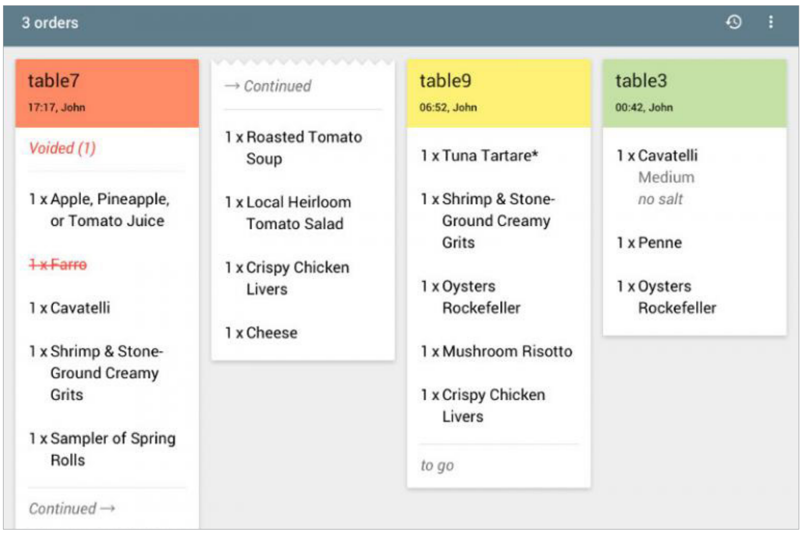


If there are item modifiers and/or comments, they will be listed just under the item name. The ticket comment is shown in the footer.

Long tickets break down to several pieces so you can still see the entire ticket on one screen without scrolling.

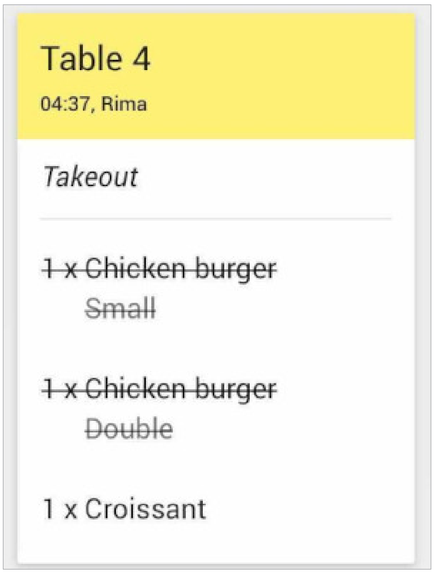
As time passes, ticket header color will change from green to yellow to red, indicating orders that are almost or already late. The time period can be adjusted in Settings.
If you edit an open ticket and void an item, KDS will display the voided item in the ticket in red strikethrough font.
If you edit an open ticket, adding an item, it will be shown as a new ticket.

2



If you tick an item at the ticket, it will become strikethrough; you can use it to indicate that it is already cooked.

3

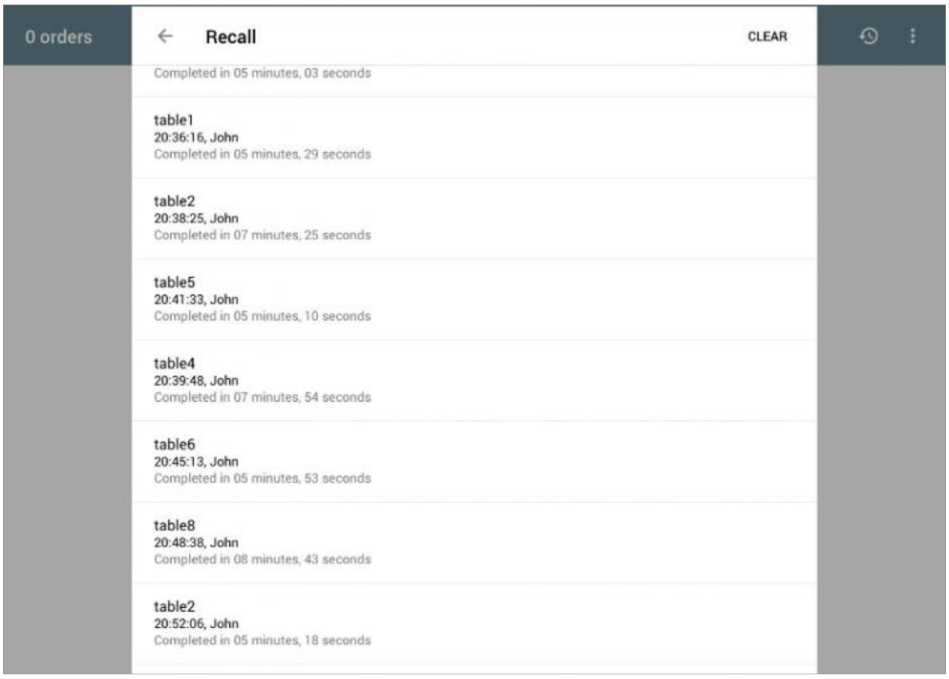


Tap on the ticket header to mark it complete when all the items are done.

To recall a closed ticket tap on the clock icon and tap the ticket you wish to recall.

To clear the entire list of completed tickets, tap ‘Clear’.

4



9.20 Kitchen Display System Configuration Guide

This guide will show you how to configure Loyverse KDS. To learn more about working with kitchen display systems, please read How to Use Loyverse KDS Kitchen Display.

Cafes and restaurants use kitchen display systems (KDS) instead of kitchen printers to inform the cooking staff what to prepare from an order.

To configure:

1. Install Loyverse KDS app on a separate tablet, and place it in the kitchen, in landscape mode.
2. Specify device name in systems settings.

IMPORTANT: Make sure that both POS and KDS devices are connected to the same wifi network.

3. Configure Loyverse KDS app.
4. Create a printer group in the Back Office.
5. Pair kitchen display with Loyverse POS

That's it, you are ready to go!

9.20.1 Install Loyverse KDS app

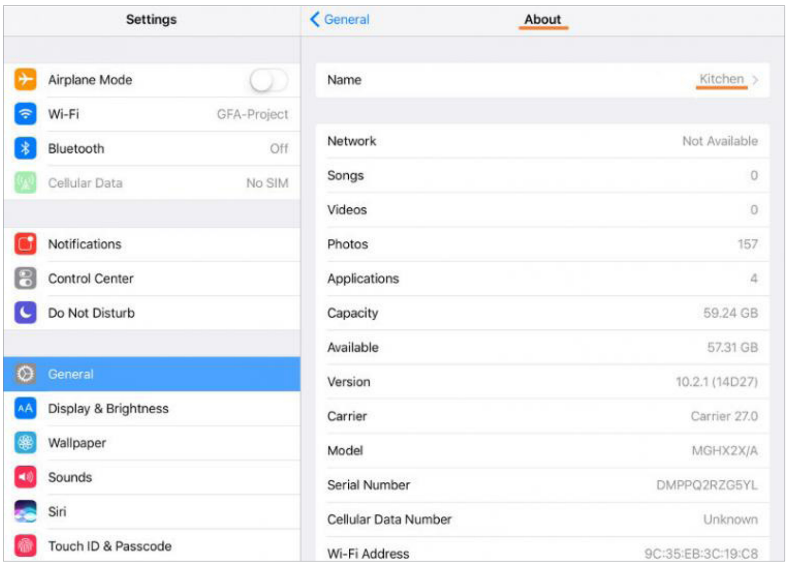
Download the Loyverse KDS for iPad (the recommended version of **iOS is 11.0 or higher**) or Android (**5.0 or higher**) tablet. Although the minimum requirement is 7" display, it is recommended to use at least a 10" tablet for better visibility. The tablet should be positioned in landscape mode.

9.20.2 Specify a device name

Your Loyverse KDS app will inherit the device name. The default device name is not very informative, thus it is recommended (but not mandatory) to give your device a name reflecting its location — Kitchen, Bar, etc.

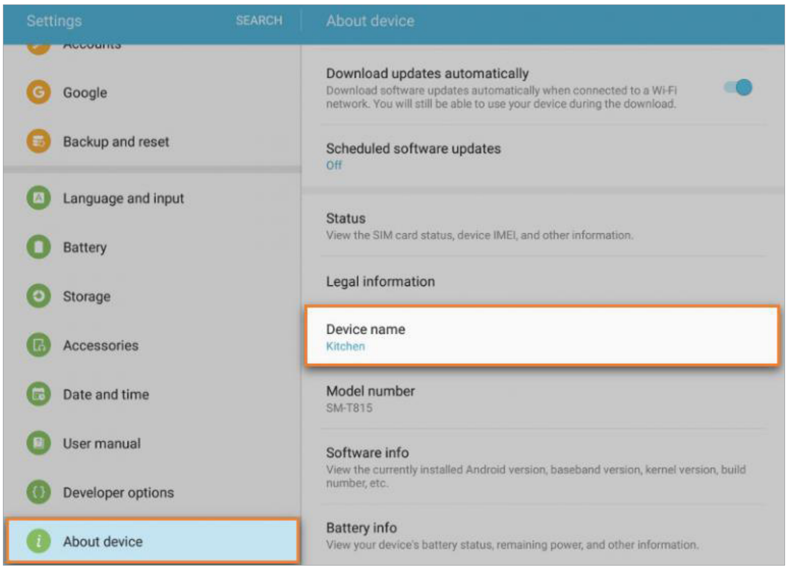
To configure the device name on an iPad, go to Settings > General > About. Tap the first line, which shows the name of your device. Rename your device, then tap Done.

1



To configure a device name on an Android tablet, go to Settings > About device. On the next screen, tap Device Name, rename your device and tap OK.

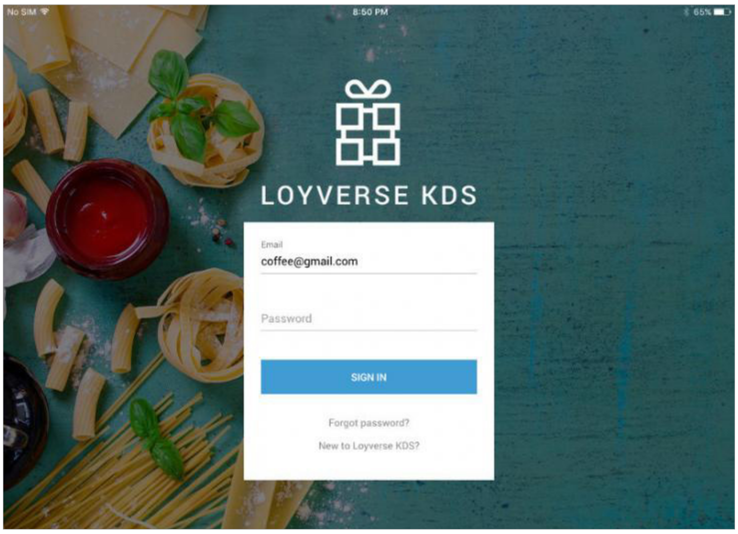
2



9.20.3 Configure Loyverse KDS app

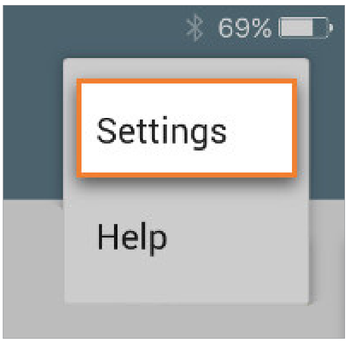
Launch the app and log in with the same login and password as you use for Loyverse POS app.

1



Go to the menu at the right top corner (three dots) and tap Settings.

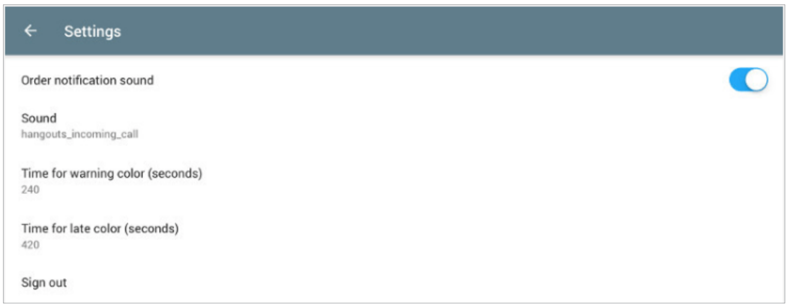
2



To use sound notifications, turn the ‘Order notification sound’ option on and choose a sound from your device. The sound will be played each time a new order appears.

You will also want to adjust the time intervals after which the ticket headers will change its color to warning (yellow) and late (red). Default values are 4 minutes (240 seconds) and 7 minutes (420 seconds).

3

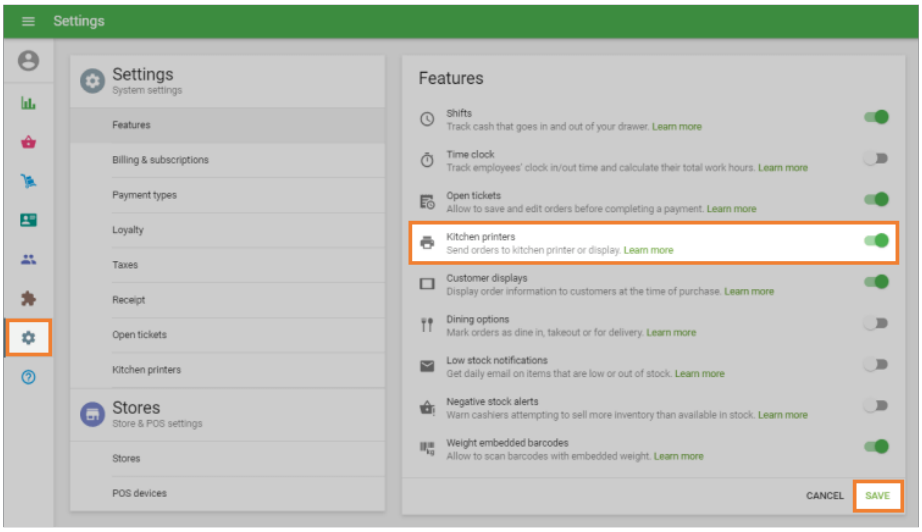


9.20.4 Create a printer group

Loyverse POS treats kitchen display as a kitchen printer, therefore the Back Office configuration for a kitchen display is the same as for kitchen printers.

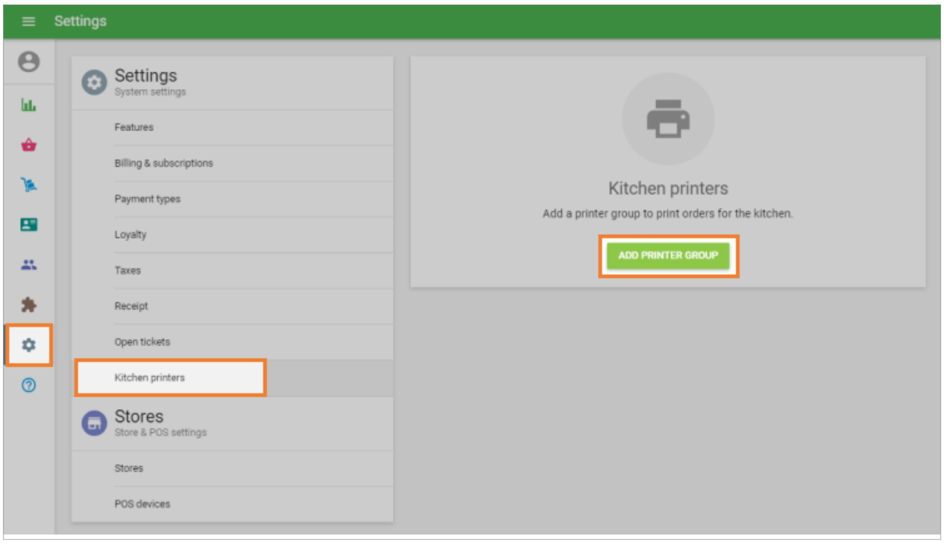
Log in to the Back Office, navigate to the Settings menu and switch on the "Kitchen Printers" slider in the "Features" section.

1



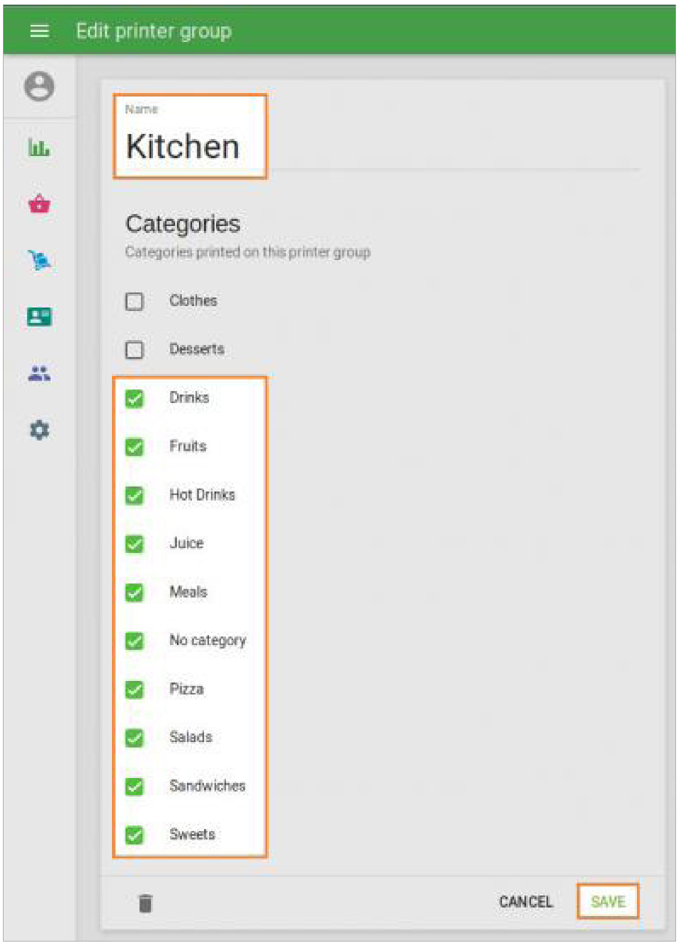
Click the "Kitchen Printers" menu and create a printer group.

2



Give the printer group a name. Tick item categories that should be included in this printer group and save your selection.

3

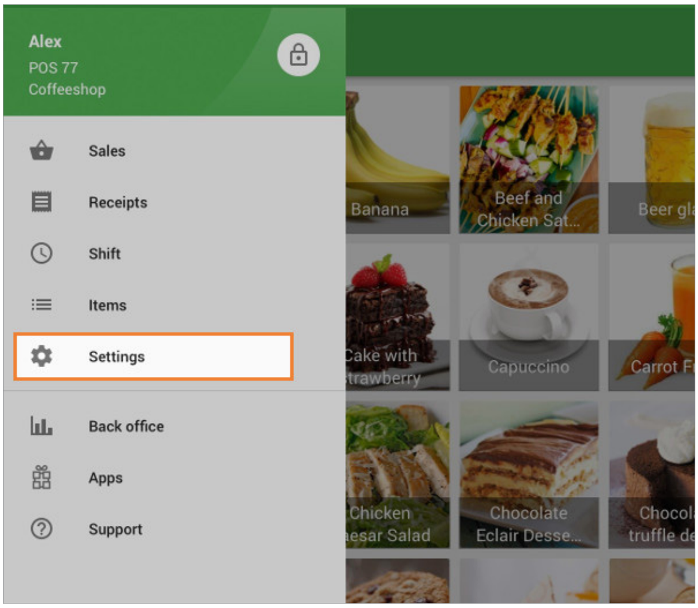


9.20.5 Pair kitchen display with Loyverse POS

First, make sure that all mobile devices with Loyverse KDS and Loyverse POS are connected to the same Wi-Fi router.

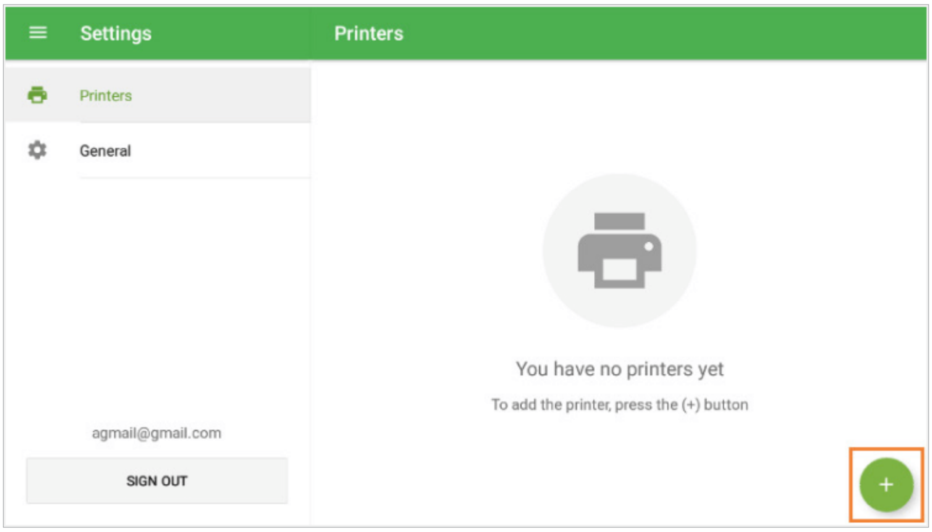
Then launch Loyverse POS and go to Settings > Printers.

1



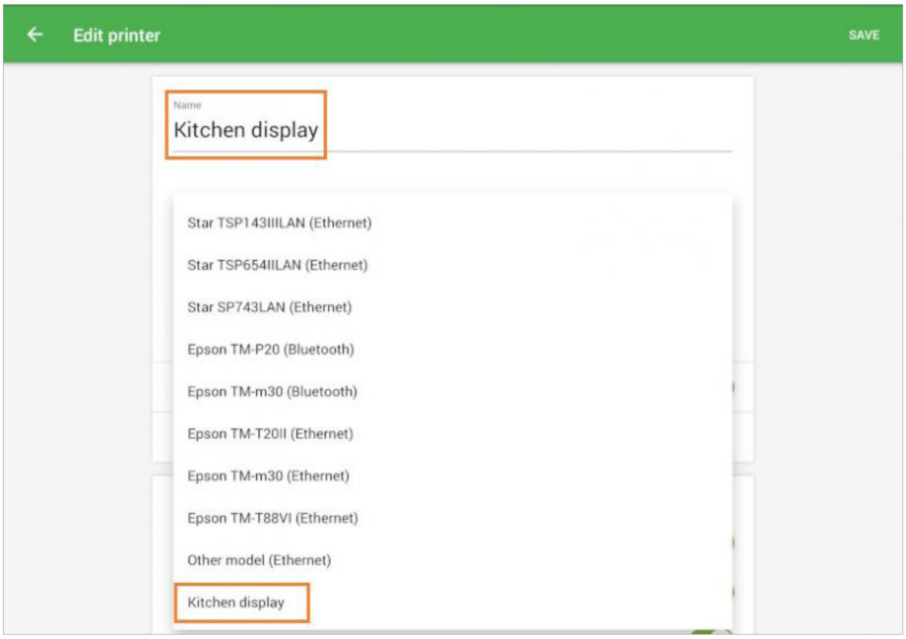
Tap the '+' button to add a kitchen display as a printer.

2



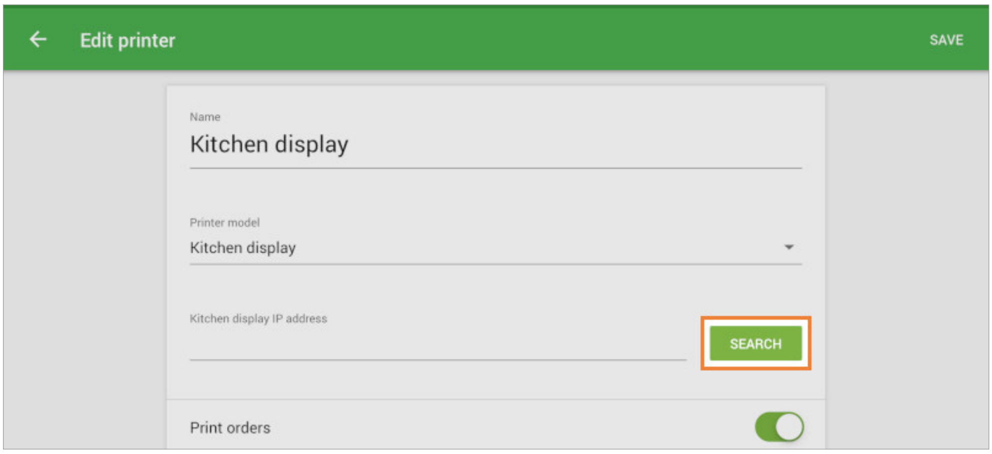
Enter your kitchen display name into the 'Printer name' field and select Kitchen Display from the drop-down menu.

3



Tap the 'Search' button to search the network for available kitchen display devices.

4

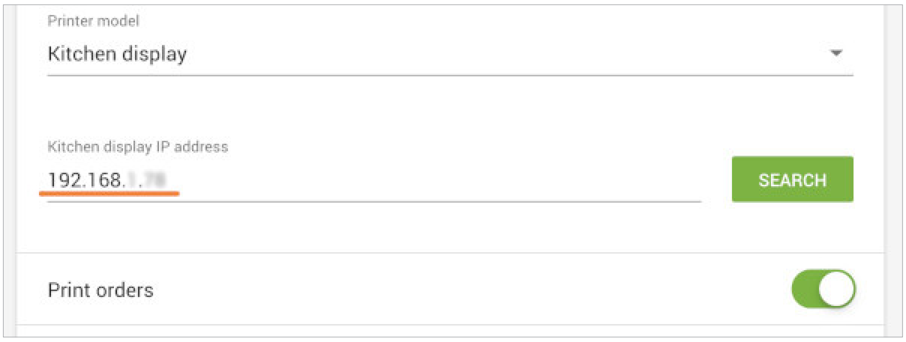


Select the appropriate kitchen display from the list of discovered devices and click OK.

5

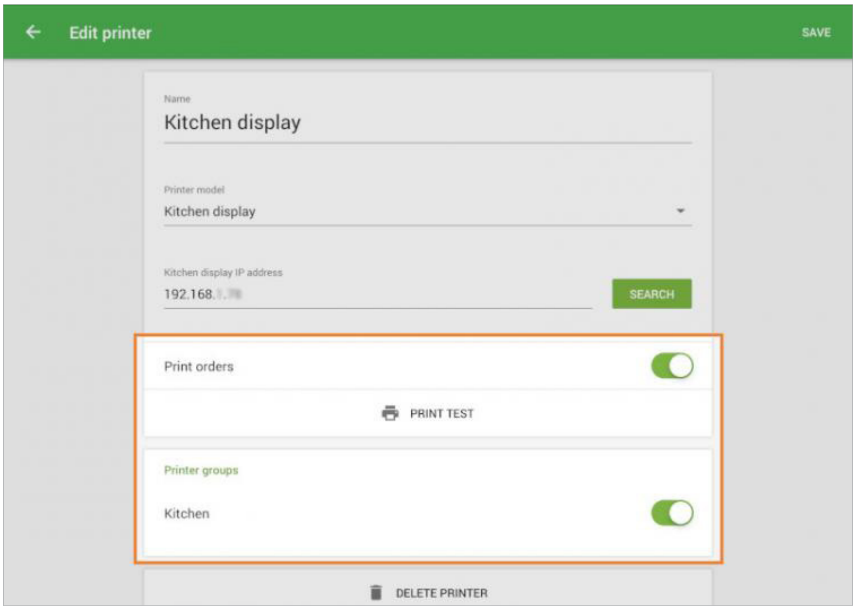
If automatic discovery fails, you can manually enter the IP address of the kitchen display device.

6



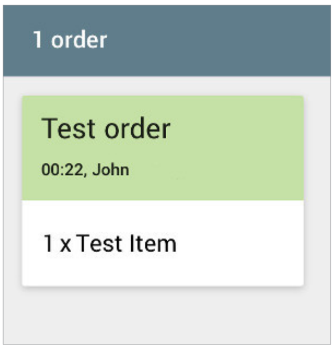
Then switch ‘Print orders’ on, select a printer group and tap the ‘Print test’ button.

7



If you see a test order appear on the kitchen display, you have configured Loyverse KDS correctly.

8



Save your settings and enjoy!

If no test order appears, re-check the device network settings or chat with our support team.

9.21 Troubleshooting When Working with KDS

9.21.1 Separate Router

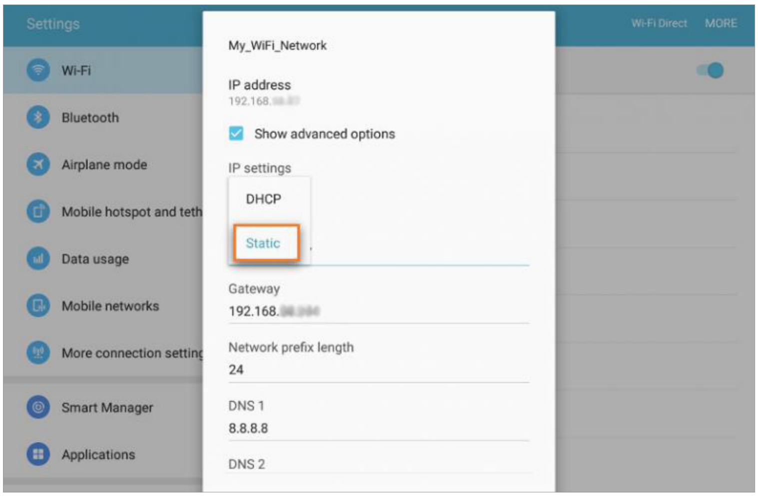
Often problems of losing the connection between Loyverse POS and KDS appear when there are many other Wi-Fi connections to the same Wi-Fi router.
We recommend having separate router with Wi-Fi connection only to the mobile device with Loyverse POS App and mobile devices with KDS App.

9.21.2 Assign a static IP address to the kitchen display tablet

Connect your device to the same WiFi network as the device with Loyverse POS is connected to, and make sure the connection is working. Then change your network settings DHCP (automatic) to static (manual).

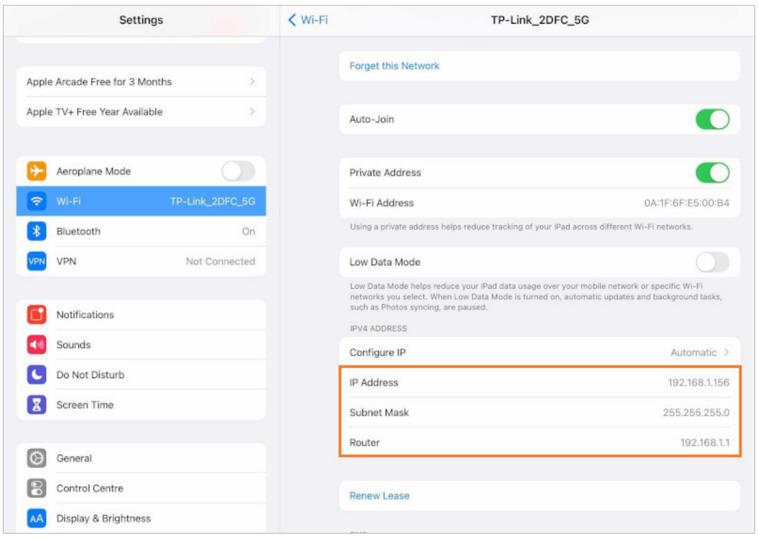
On an Android tablet, go to Settings > WiFi, tap and hold the active network, then tap 'Manage network settings'. Tap 'Show advanced options' and scroll down to IP settings, then change 'DHCP' to 'Static'. Tap 'Save'.

1



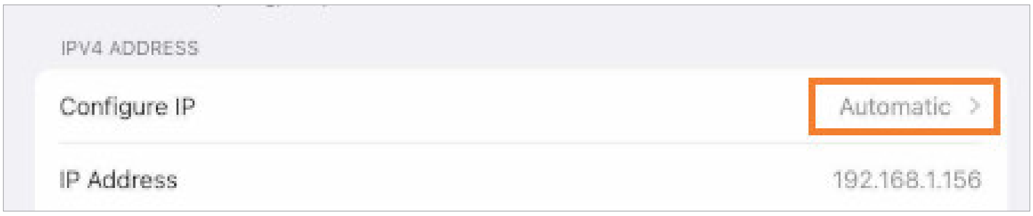
On an iPad, go to Settings > WiFi.
Write down the IP address, Subnet mask, Router values that are in Automatic IP configuration mode.

2



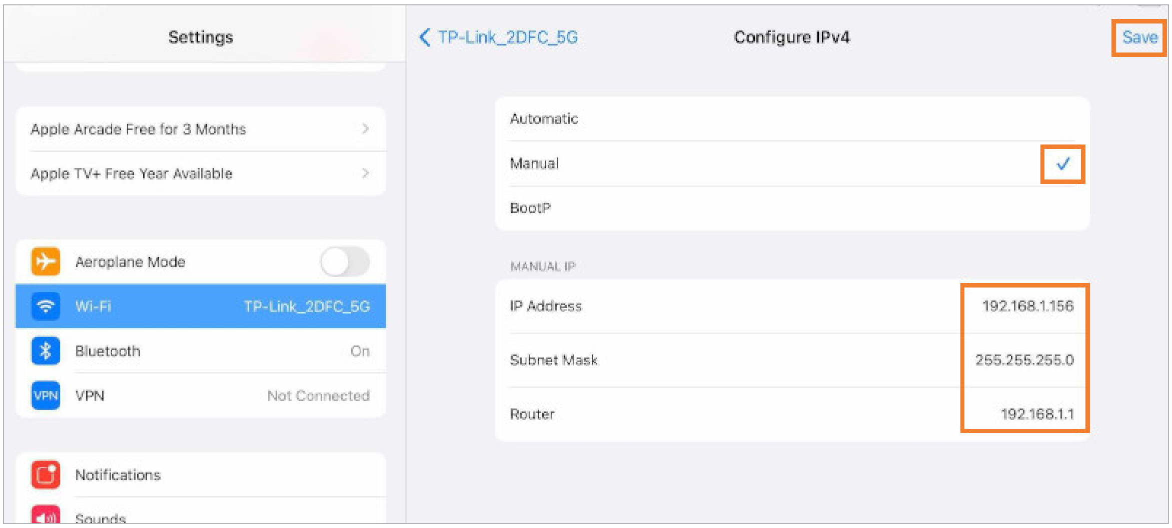
Then click on the Automatic button.

3



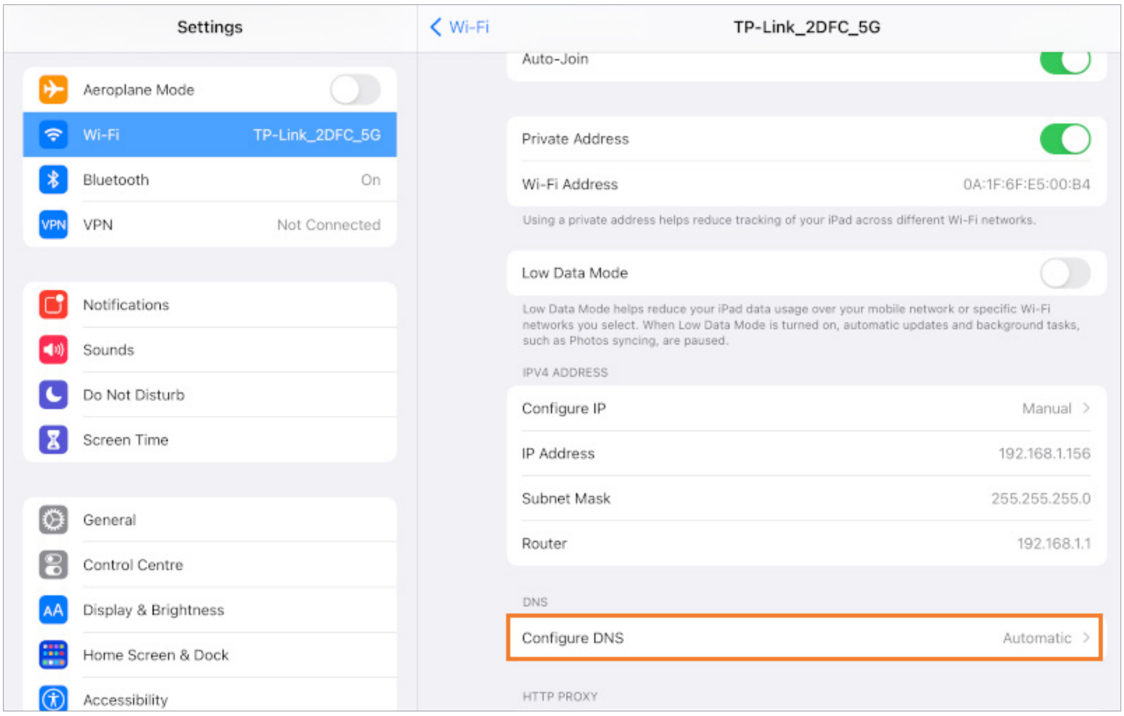
Switch the configuration mode to the Manual and enter values from Automatic IP configuration into respective fields. Then, tap the 'Save' button.

4



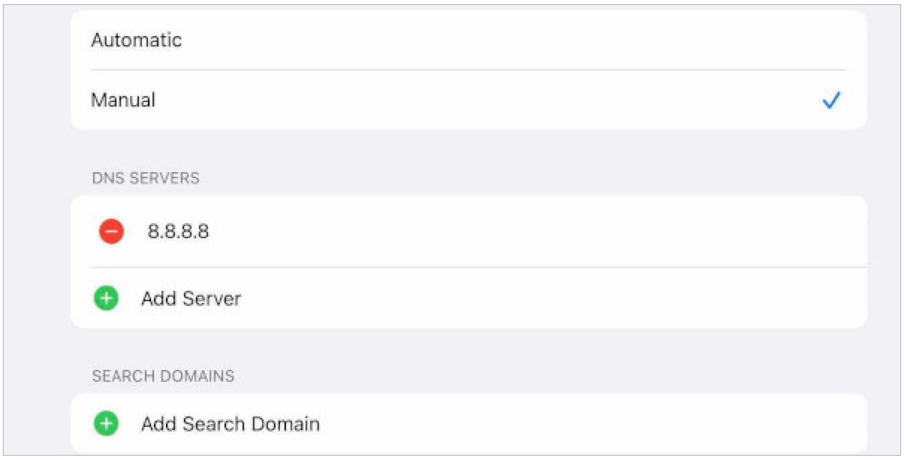
In the same way, switch the DNS settings from automatic to manual mode.

5



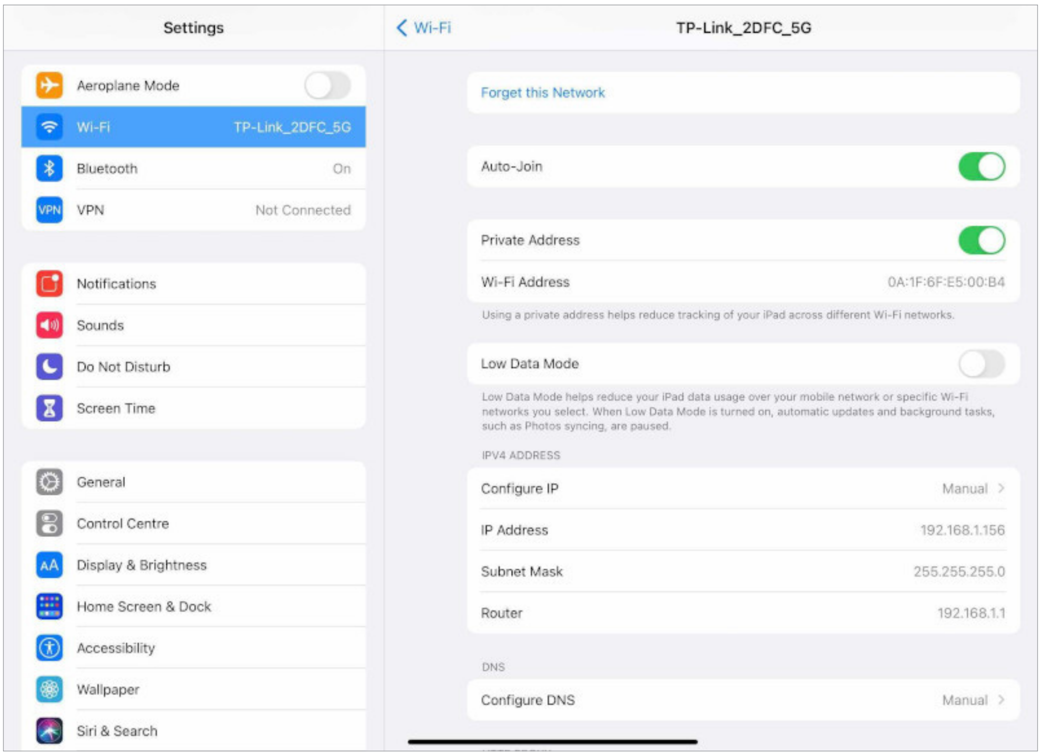
And add the DNS server value. For example, you can use the value 8.8.8.8 for Google OpenDNS.

6



Now you have set your iOS to work in the static IP address mode.

7



10. Payment

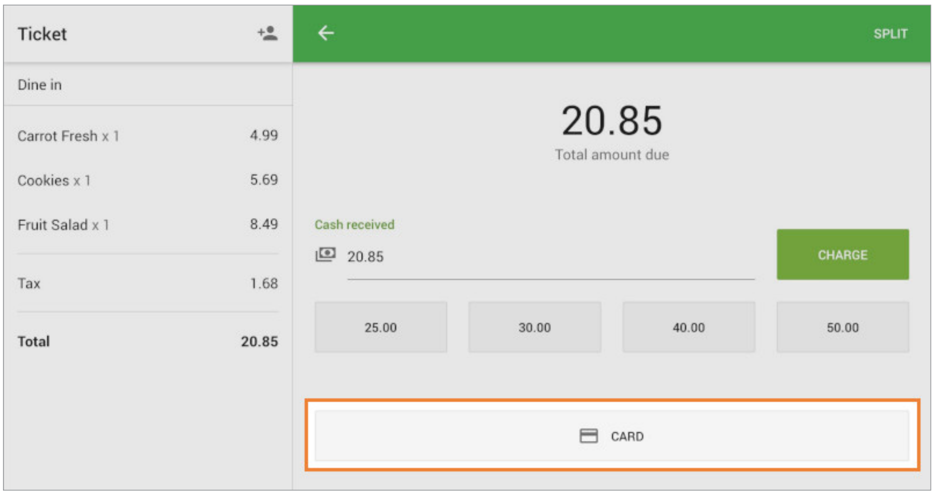
10.1 How to Work with Credit Card Payments

You can use any credit card processing system with Loyverse POS, without integration between them.

Loyverse POS can register payments made through a card processing system that is installed and operated separately.

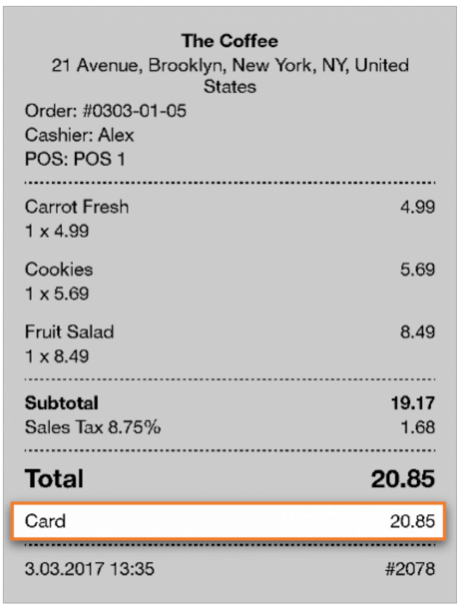
On the final stage of the sale transaction, Loyverse POS gives you a choice between credit card or cash. But it does not connect to the credit card terminal itself and does not transfer the amount of purchase to the terminal. Therefore, at the card terminal, you need to enter the amount of sale manually and process the payment. Next, charge it to Loyverse POS by tapping the ‘Card’ button.

1



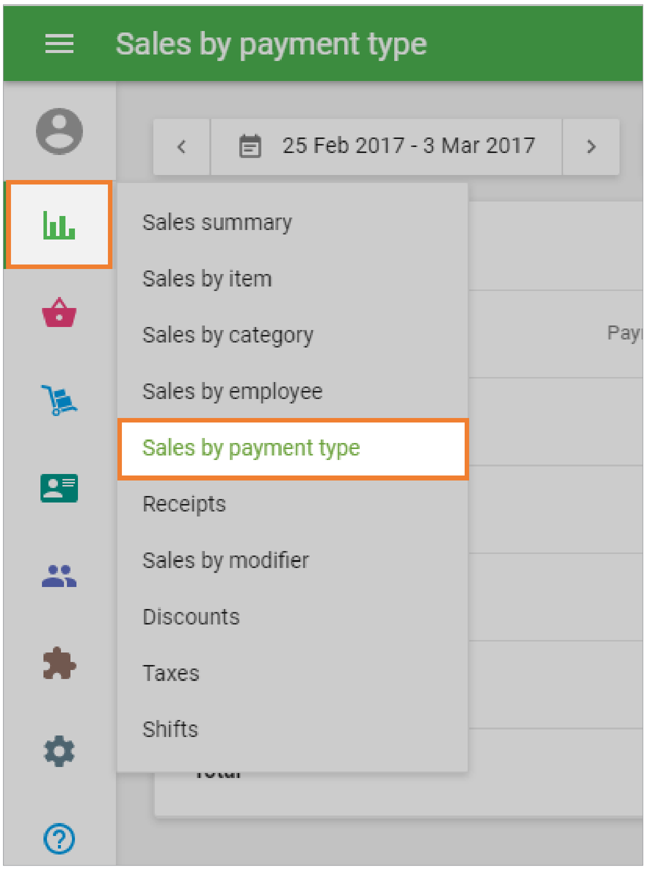
The information about payment and card type will be shown on the receipt.

2

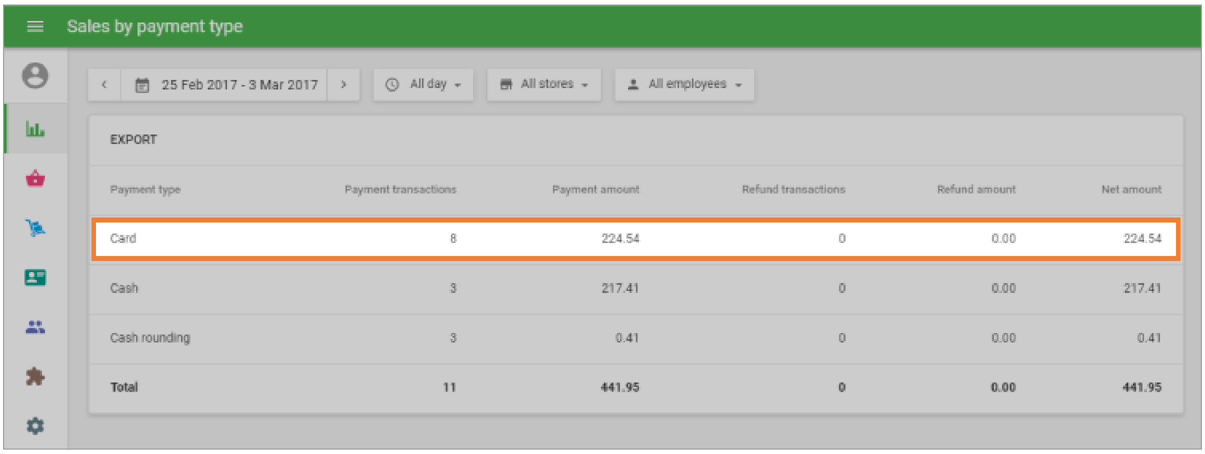


In the back office in the 'Sales by Payment Type' menu, you can find the report about credit card sales.

3



4



10.2 How to Accept Credit Cards with Loyverse POS and SumUp

Loyverse POS merchants can accept credit card payments via SumUp and available to customers in 30+ countries: Austria, Belgium, Brazil, Bulgaria, Chile, Cyprus, Czech Republic, Denmark, Estonia, Finland, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, Switzerland, The Netherlands, United Kingdom, United States.

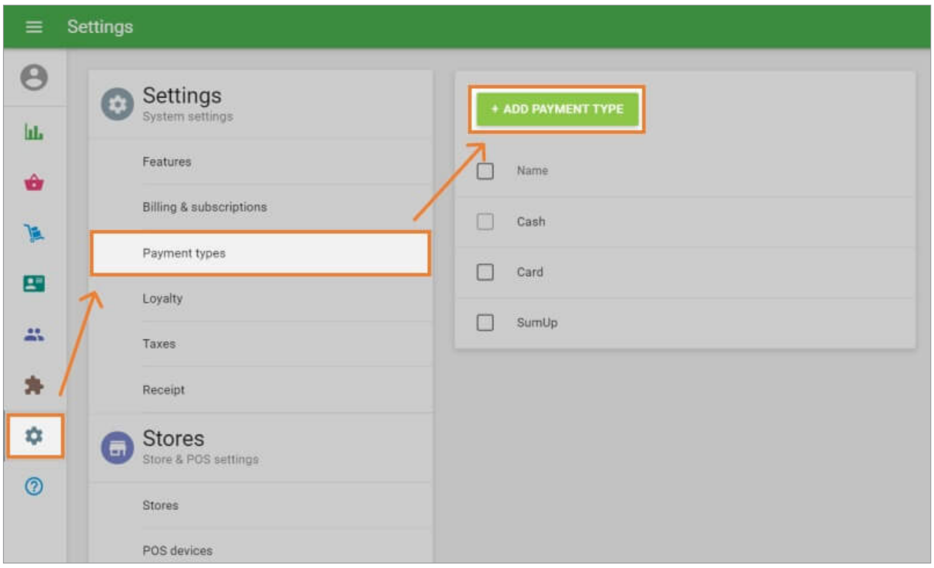
Before connecting a card reader, you have to create an account in SumUp and receive the device. Integration with Loyverse POS works on the card reader SumUp Air 1E000.

10.2.1 Connecting Card Reader

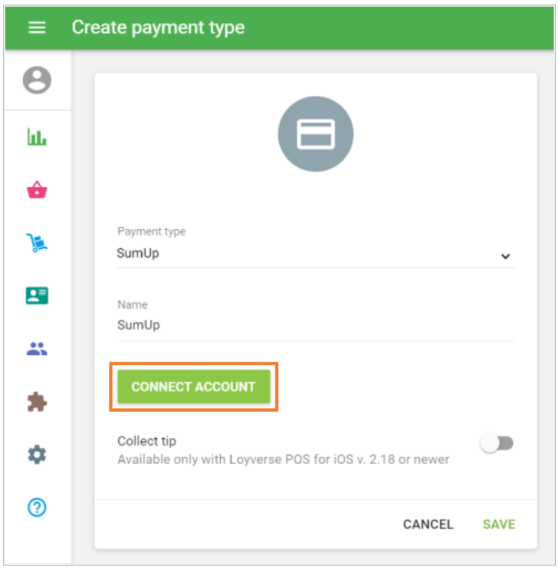
10.2.1.1 Creating a payment type

Log in to the Back Office, click the 'Settings' menu and then 'Payment types.' Click the 'Add payment type' button to add a new type of payment.

1



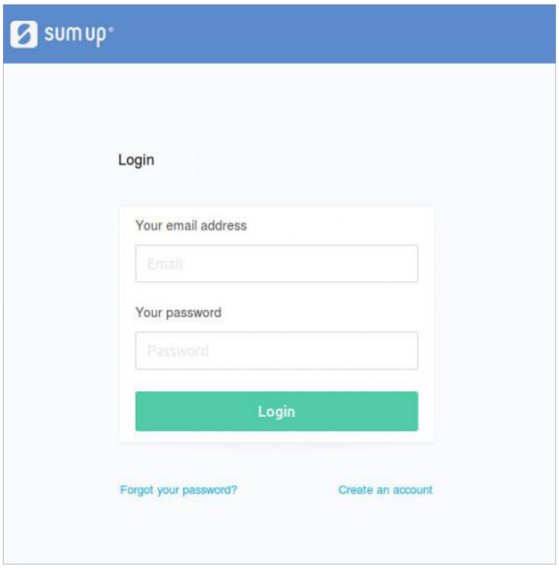
2



In the Add Payment Type window, select a 'SumUp' payment type from the drop-down list and tap 'Connect account' button.

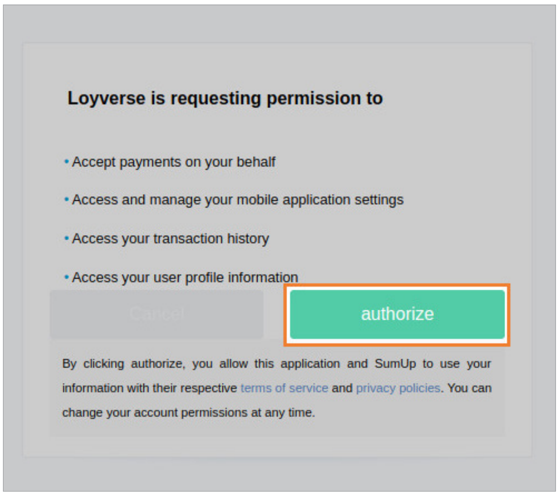
Enter Email and Password from your [SumUp account](https://me.sumup.com/).

3



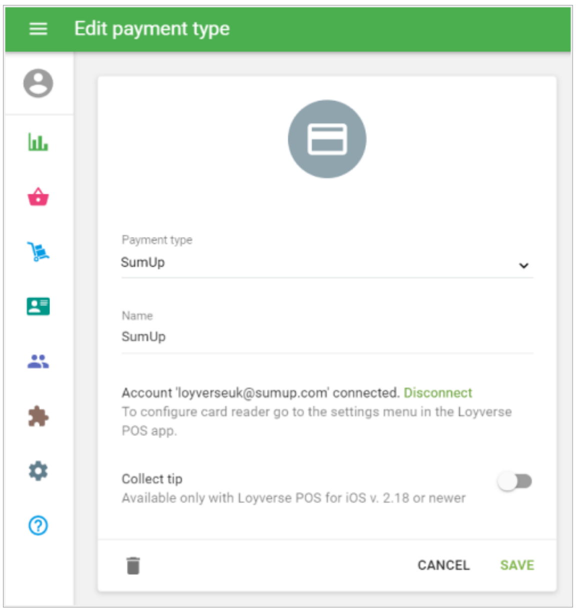
Accept permissions request by clicking on 'authorize' button.

4



You will see the connected account message, click 'Save' button.

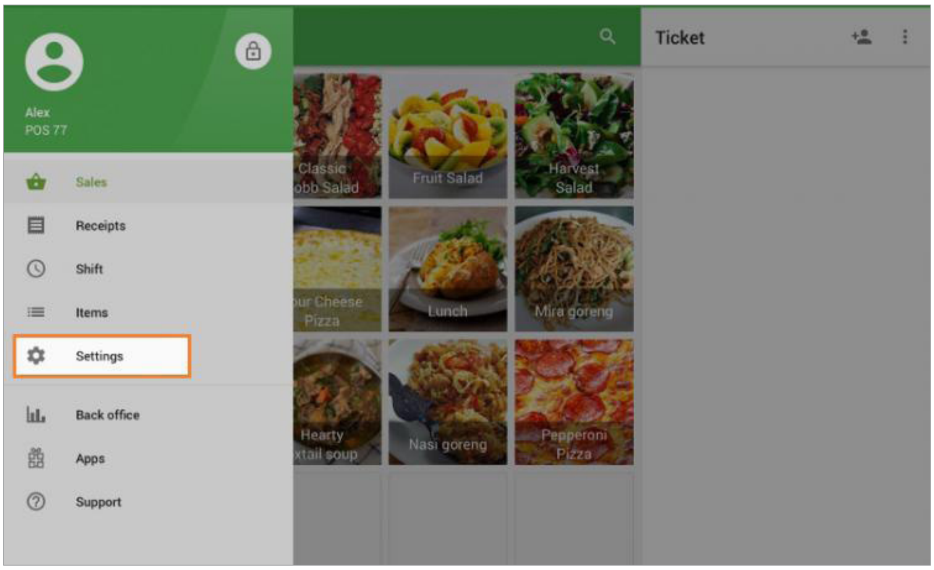
5



10.2.1.2 Connecting with iOS devices

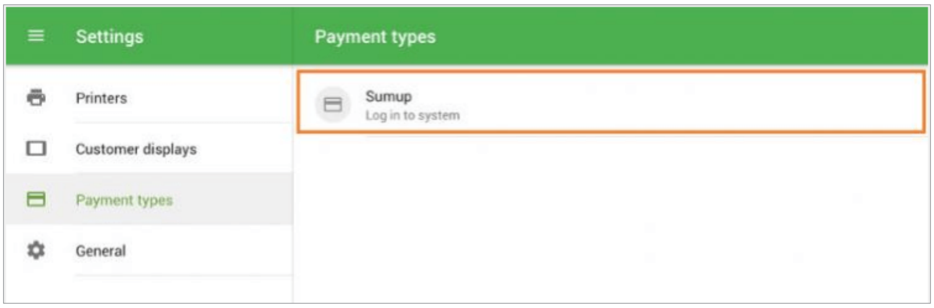
Then launch Loyverse POS and go to Settings > Payment Types.

1



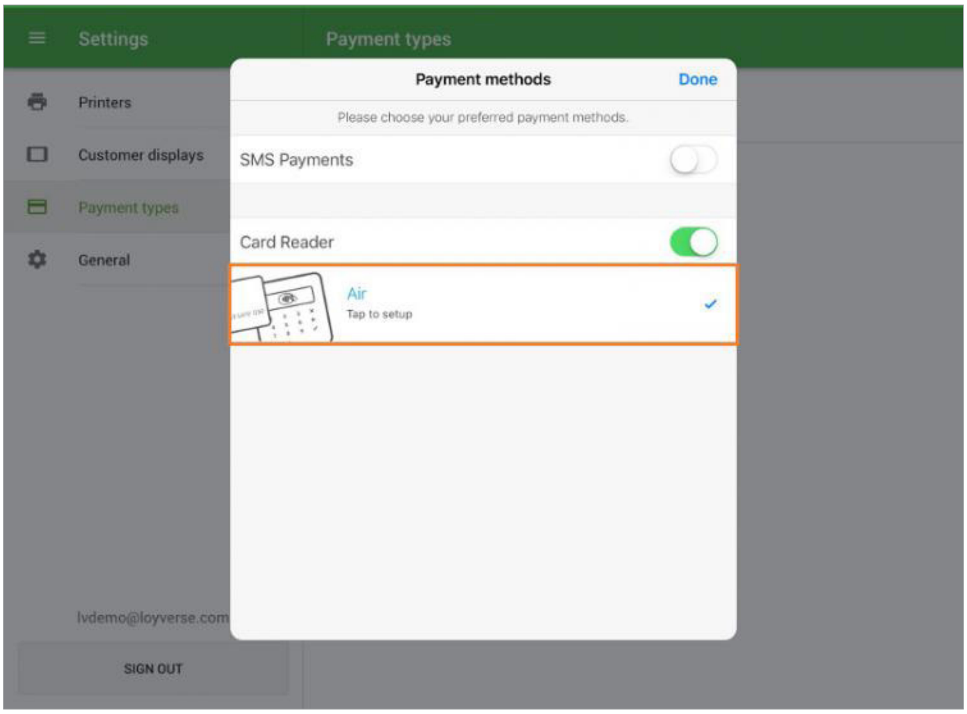
Tap the ‘Sumup’ button for account settings.

2

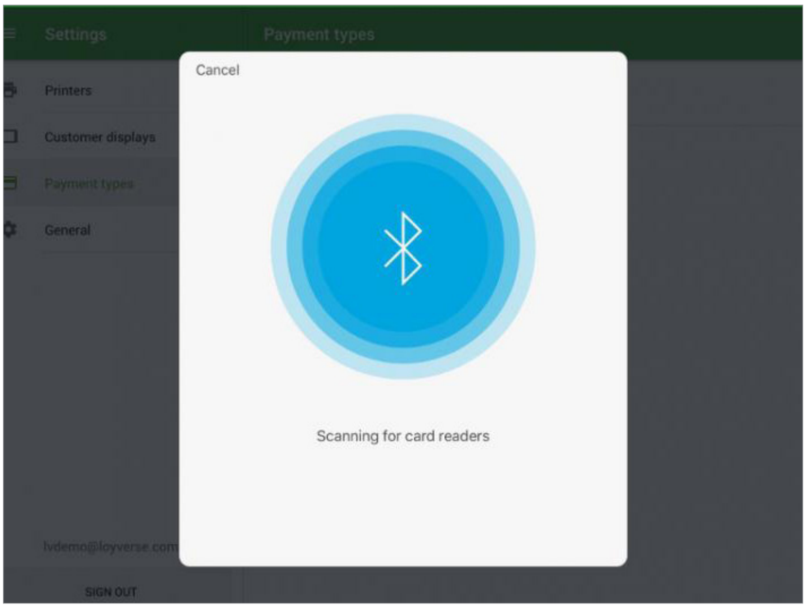


In the ‘Payment methods’ screen tap ‘Air’ button for set up.

3

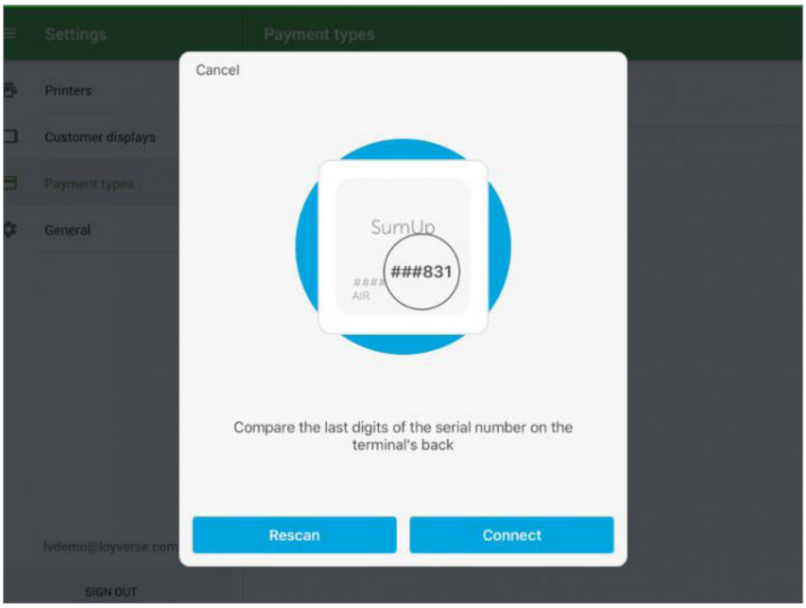


4



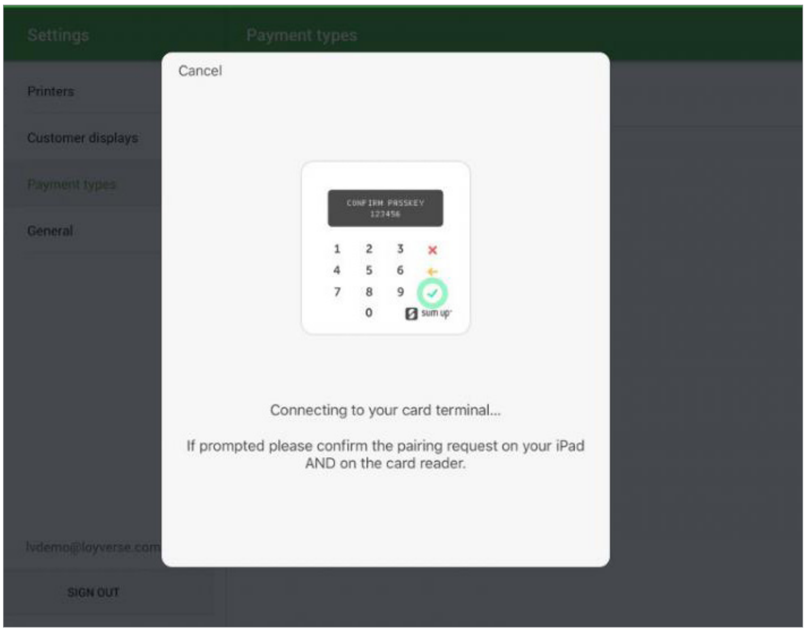
The application will start searching for SumUp card readers.

5



The application will show the last three digits of the found device. Tap ‘Connect’ button.

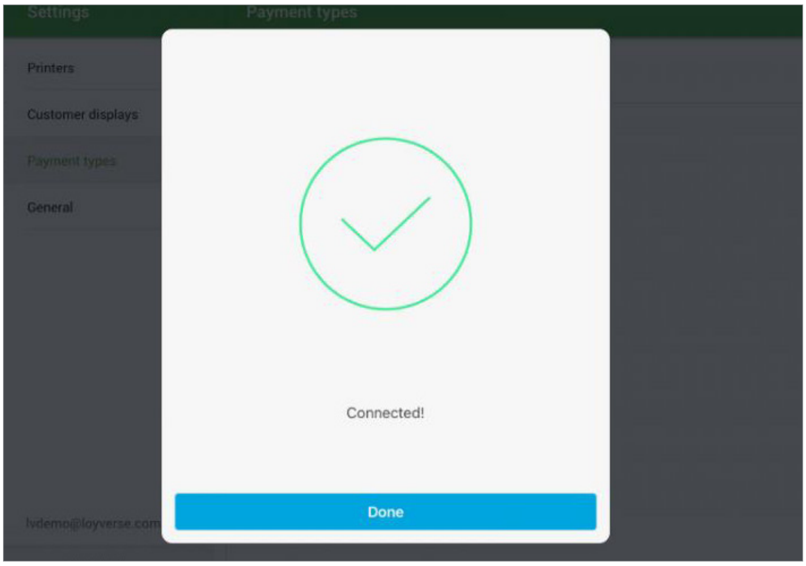
6



The application will ask you to confirm the pairing request on your card reader by pressing ‘OK’ button.

After you complete request, you will see information that card reader is connected. Tap 'Done' button.

7

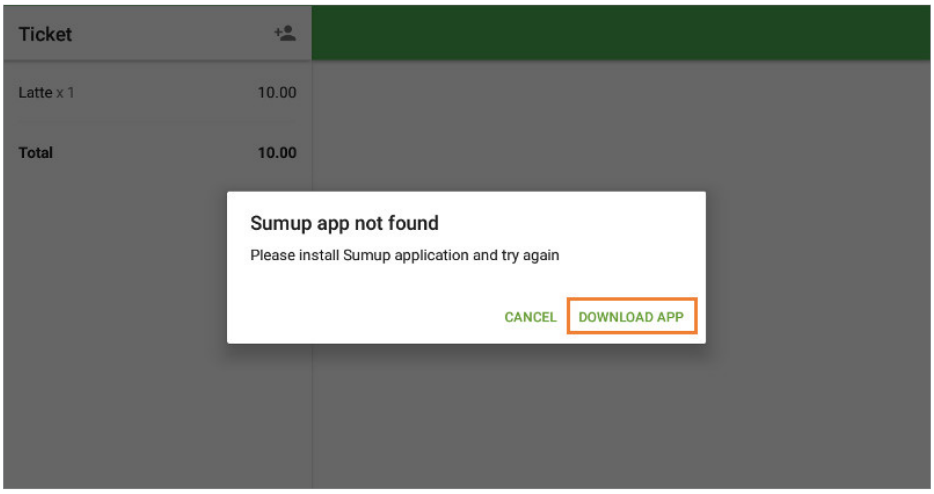


Now you are ready to accept card payments.

10.2.1.3 Connecting with Android devices

To connect SumUp card reader to Android devices make a test sales and select Sumup payment type.
You will see an invitation to download the Sumup app. Tap 'Download app' button.

1

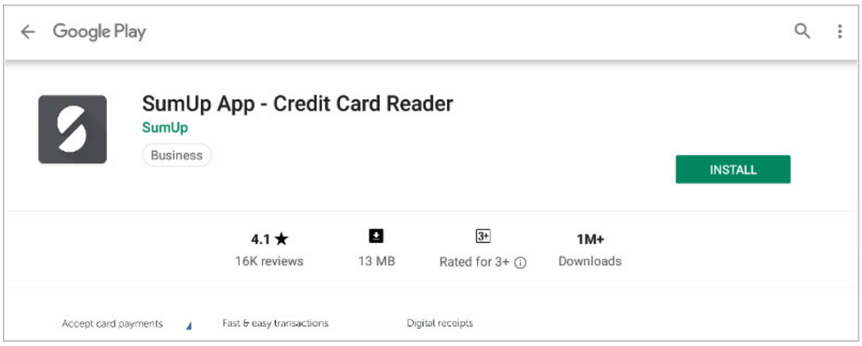


You will be redirected to [Google Play to SumUp app.]() Install the app to your device and launch it.

Note

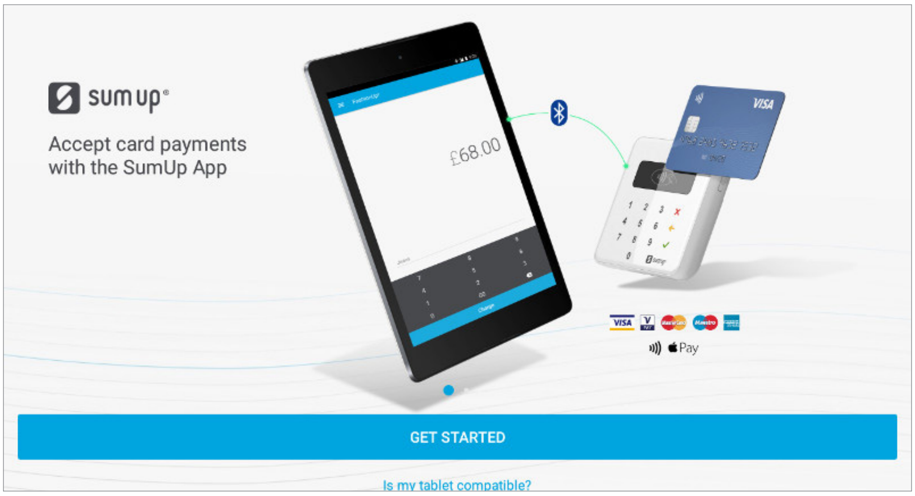
For using the SumUp App on Android devices, the required operating system is Android 6.0 or higher.

2



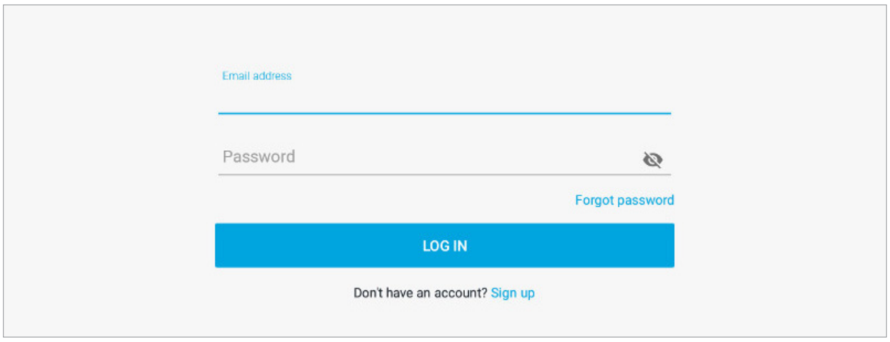
You will see the welcoming screen of SumUp app. Tap the ‘Get Started’ button.

3



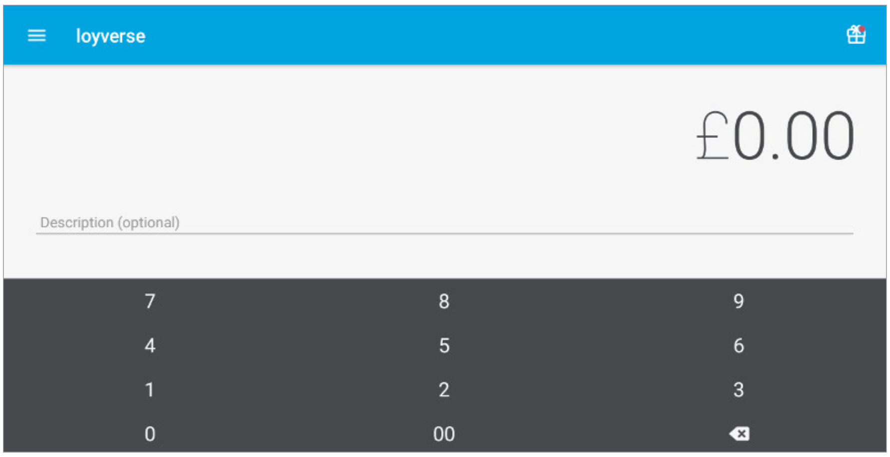
Enter Email and Password from your SumUp account.

4



You will see an invitation to make payment through SumUp app.

5



Now you can close this app and go to accept payments through Loyverse POS.

Note

SumUp works only with mobile devices which turned on geolocation.

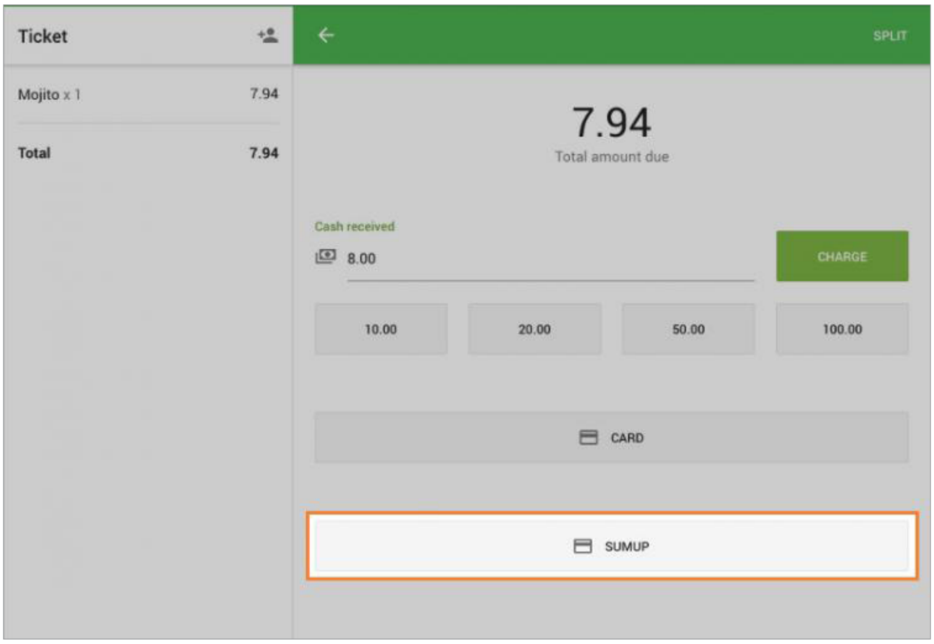
10.2.2 Processing Payments

10.2.2.1 Payment

Add items to the ticket and press 'Charge.'

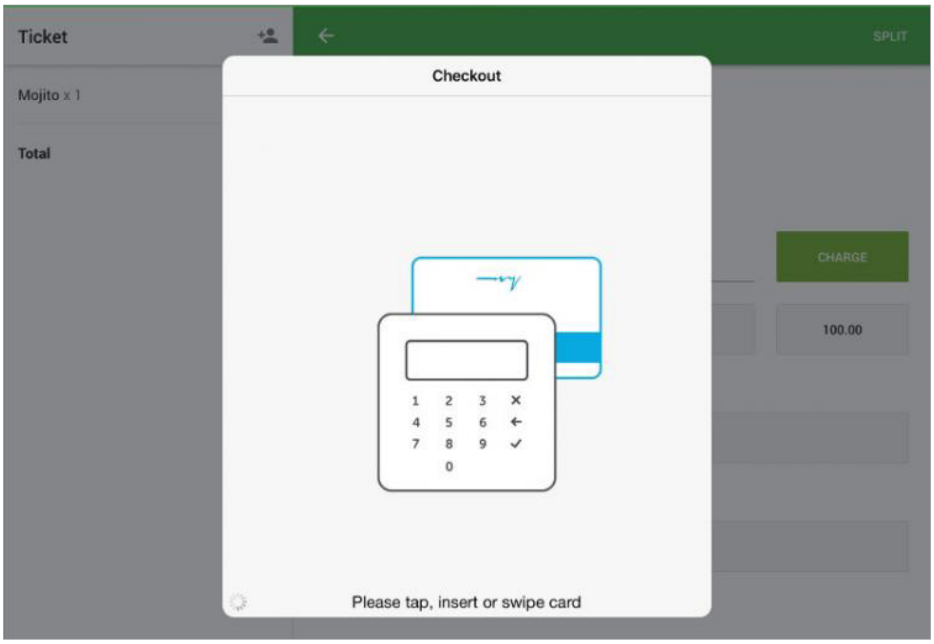
Select the SumUp payment type.

1



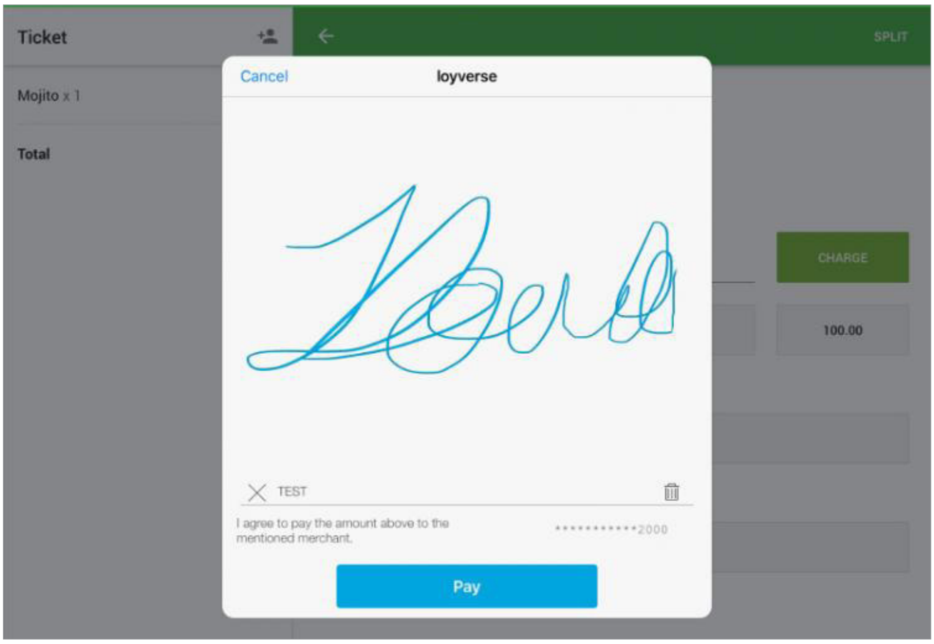
Loyverse POS will wait for a response from the card reader, and you will see an invitation to tap, insert or swipe card on the card reader.

2



Tap, insert or swipe customer card on the card reader. If the card needs the pin entry, give card reader to a customer to do that. If a card needs a signature, let customer sign on the iPad's screen.

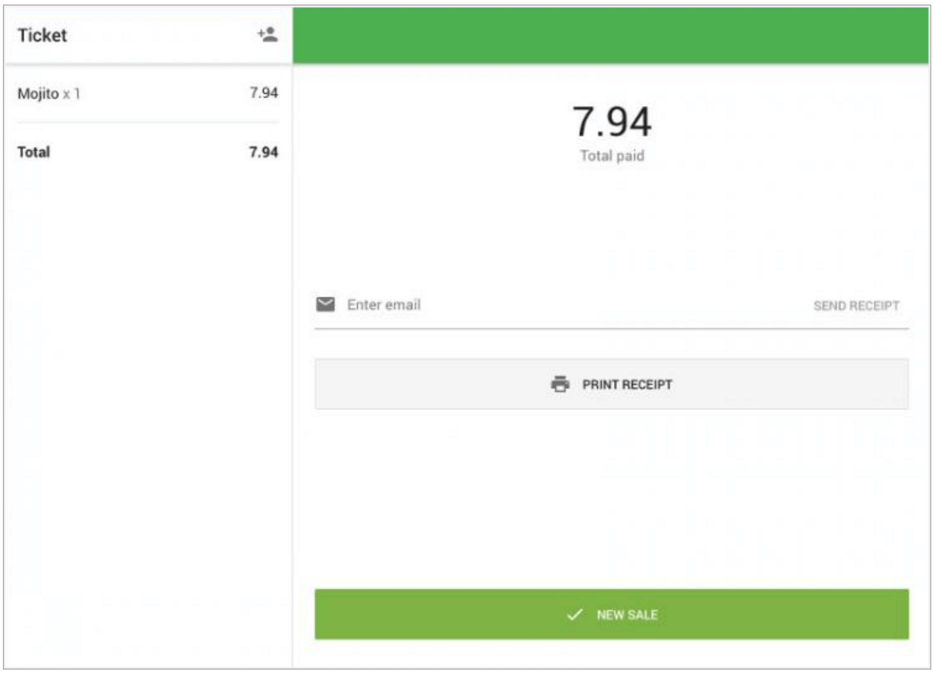
3



Tap 'Pay' button.

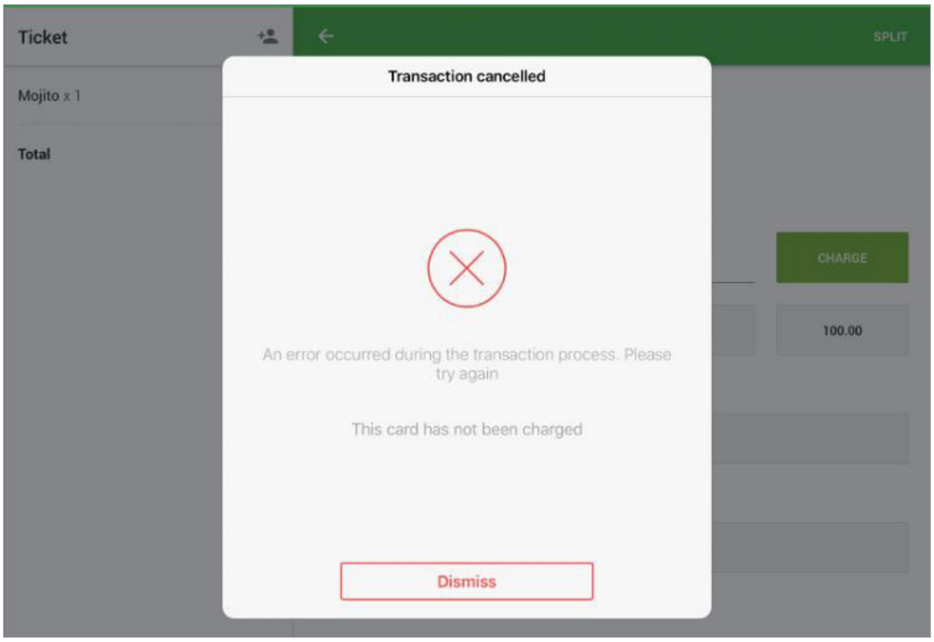
If the transaction is successful, Loyverse POS will display final screen with the paid amount.

4



In case of an error in the transaction, Loyverse POS will show an error message.

5



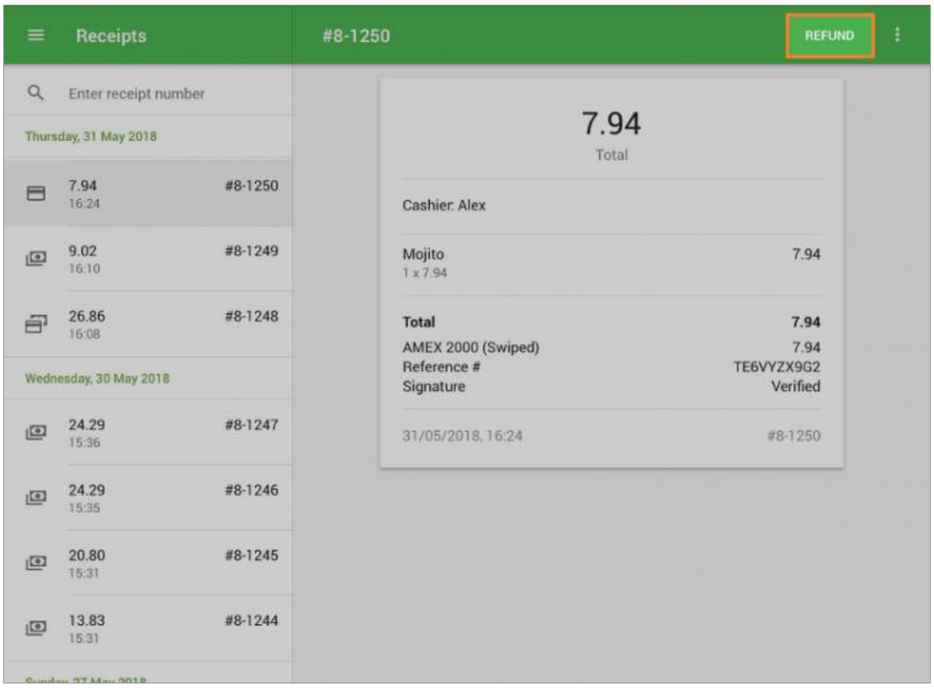
Tap 'Dismiss' button, and you will return to selecting payment type screen. You can ask the customer to choose a different type of payment (for example 'Cash') or try another card.

10.2.2.2 Refund

You can only refund the whole amount of card transaction. The card reader is not used in the refund process.
At Loyverse POS go to 'Receipts' menu, and tap needed receipt.

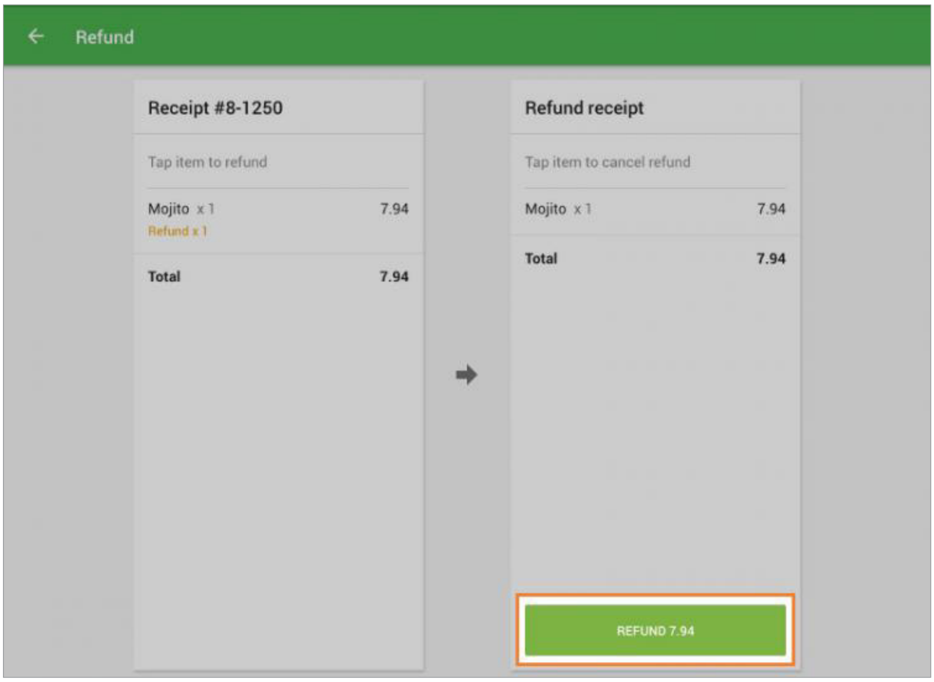
Tap 'Refund' button.

1



Select all items of the card payment from left ticket to move them to the right-side ‘Refund receipt’ list and tap ‘Refund’ button.

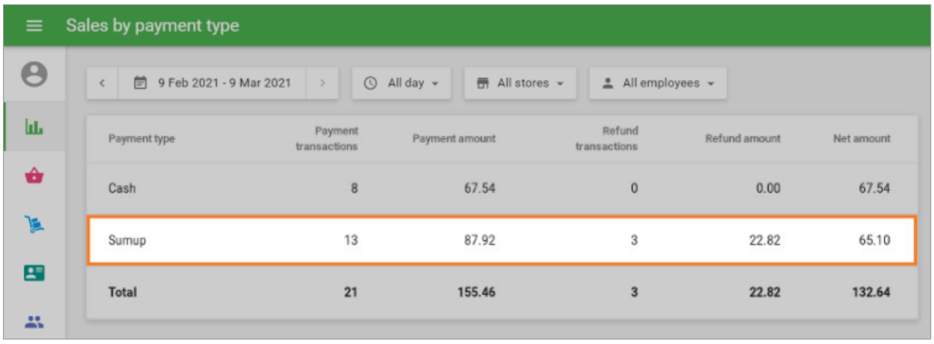
2



10.2.2.3 Reports

You can view the total number of transactions performed with the SumUp payment type. In the back office, select the ‘Sales by payment type’ report.

1



10.3 How to Accept Credit Cards with Loyverse POS and PayPal Zettle

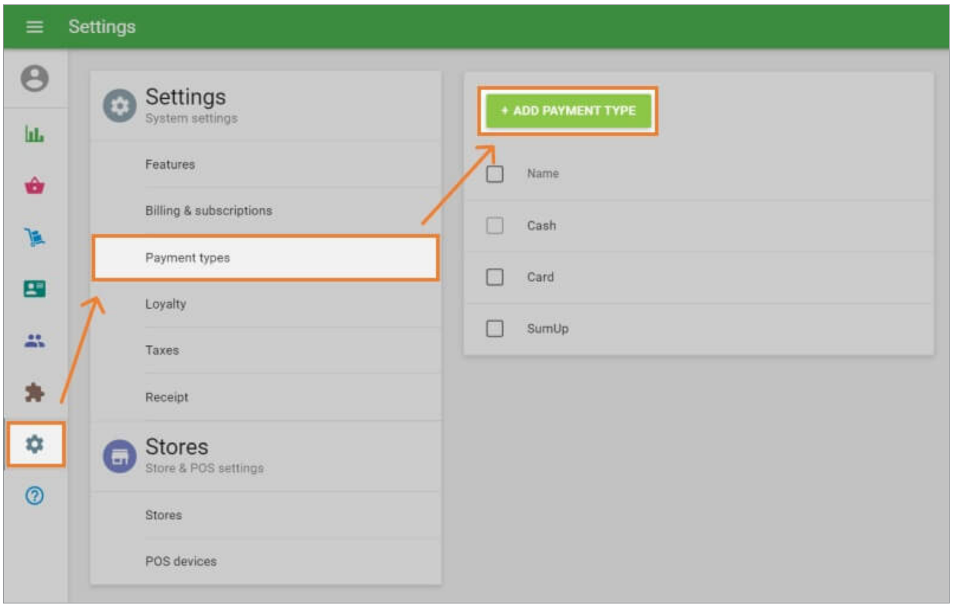
Loyverse POS merchants can accept credit card payments via PayPal Zettle and it is available to customers in USA, Brazil, Denmark, Finland, Great Britain, Italy, Mexico, Norway, Spain, Sweden, and the Netherlands.

Before connecting a card reader, you need to create an account in PayPal Zettle and receive the device. Integration with Loyverse POS works on the card reader Zettle Reader 2.

10.3.1 Connecting the Card Reader

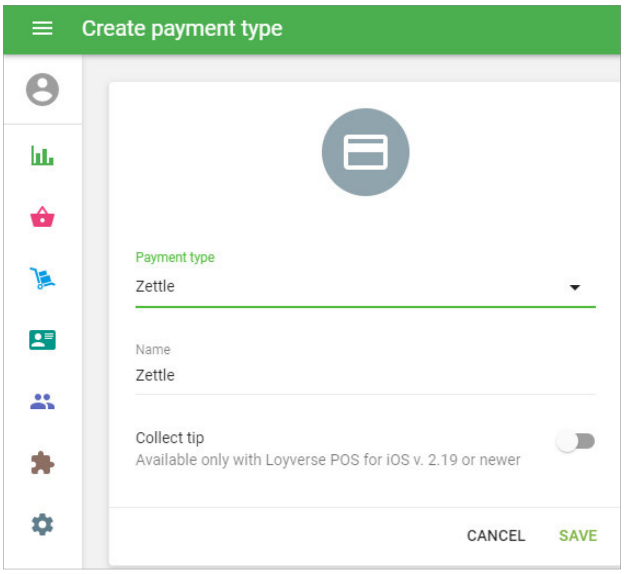
Log in to the Back Office, click the ‘Settings’ menu and then ‘Payment types.’ Click the ‘Add payment type’ button to add a new type of payment.

1



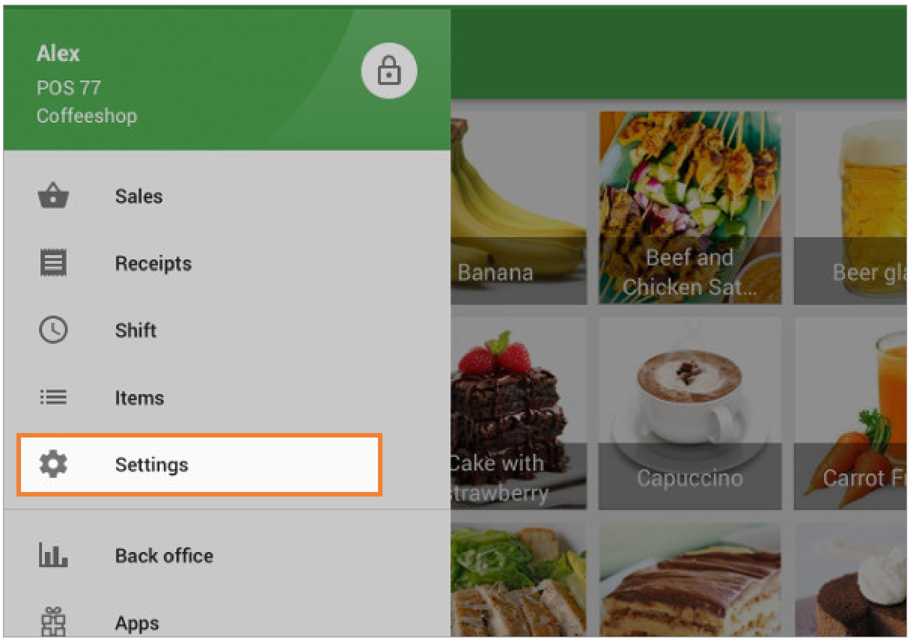
In the ‘Add Payment Type’ window, select the ‘Zettle’ payment type from the drop-down list. Save your changes when done.

2



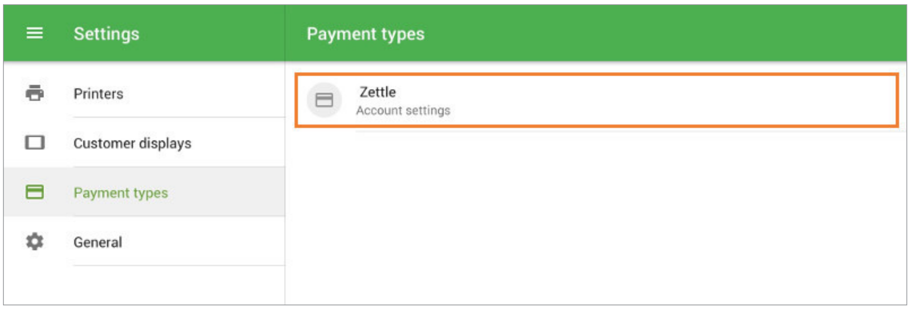
Then launch the Loyverse POS and go to Settings > Payment Types.

3



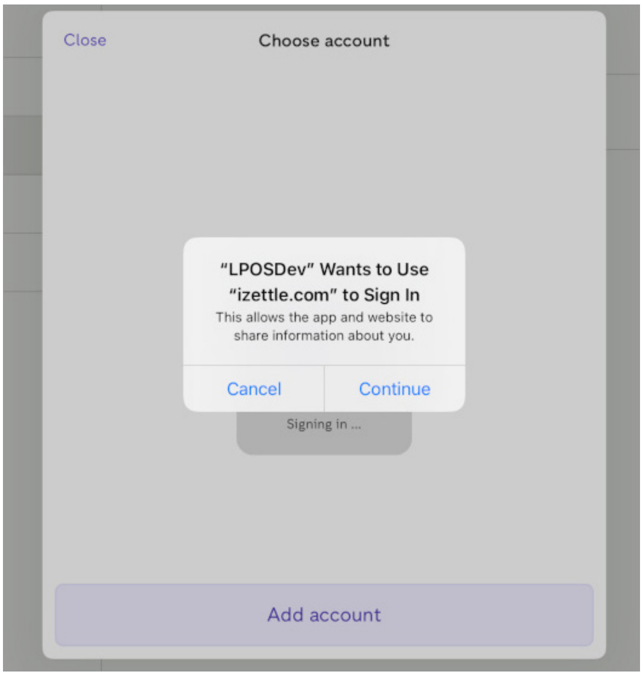
Tap the ‘Zettle’ button for account settings.

4



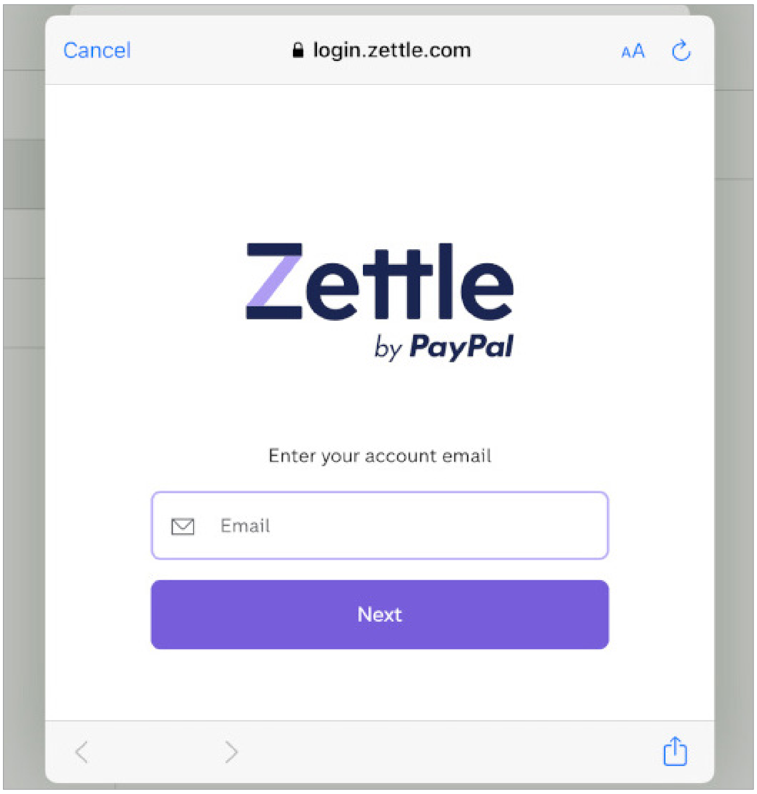
In the ‘Choose account’ window, confirm the access right to sign in to the Zettle account from Loyverse POS by tapping on the ‘Continue’ button.

5



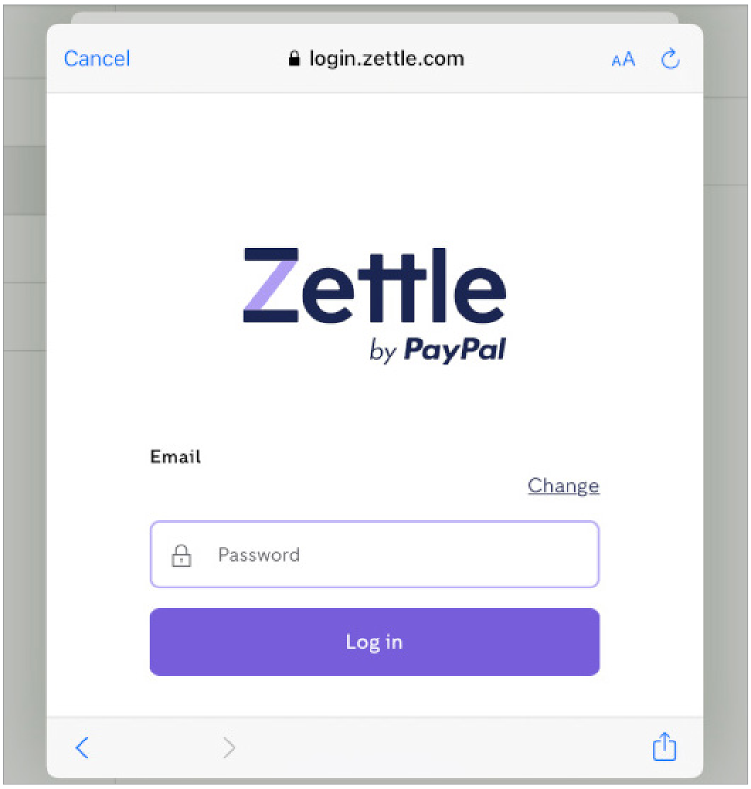
Enter the Email of your Zettle account and tap the ‘Next’ button.

6



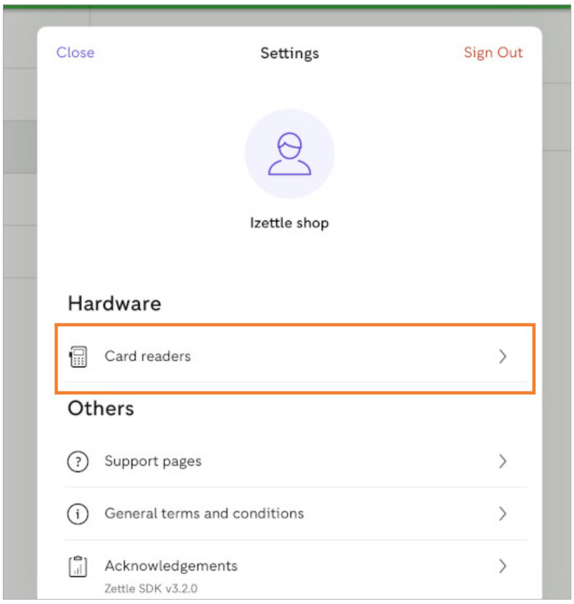
Enter the password of your Zettle account and tap the ‘Login’ button.

7



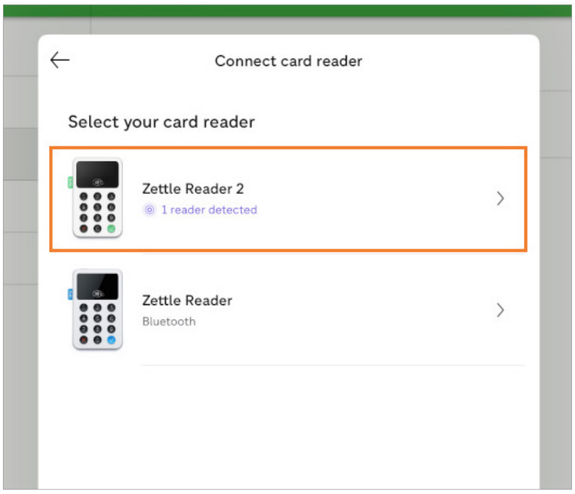
You will log in to your Zettle account. Tap the ‘Card readers’ button.

8



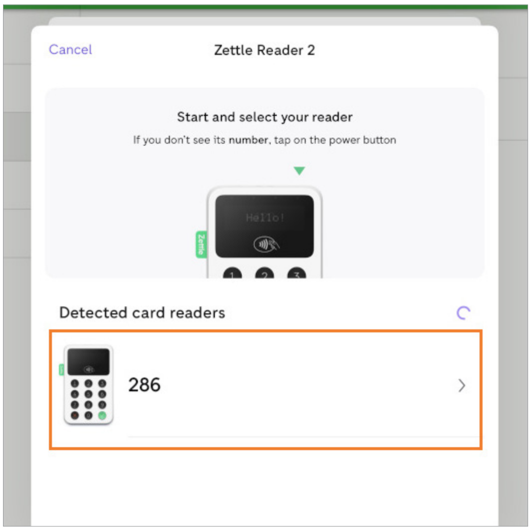
Select your type of card reader.

9



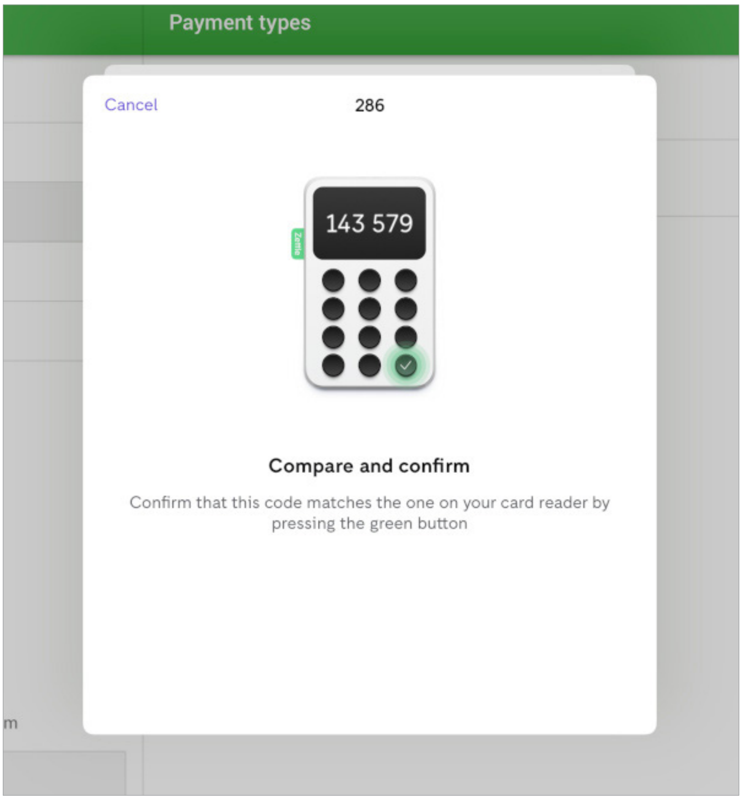
Follow the instruction on the screen: start your card reader. The system will detect your card reader. Tap on it to select.

10



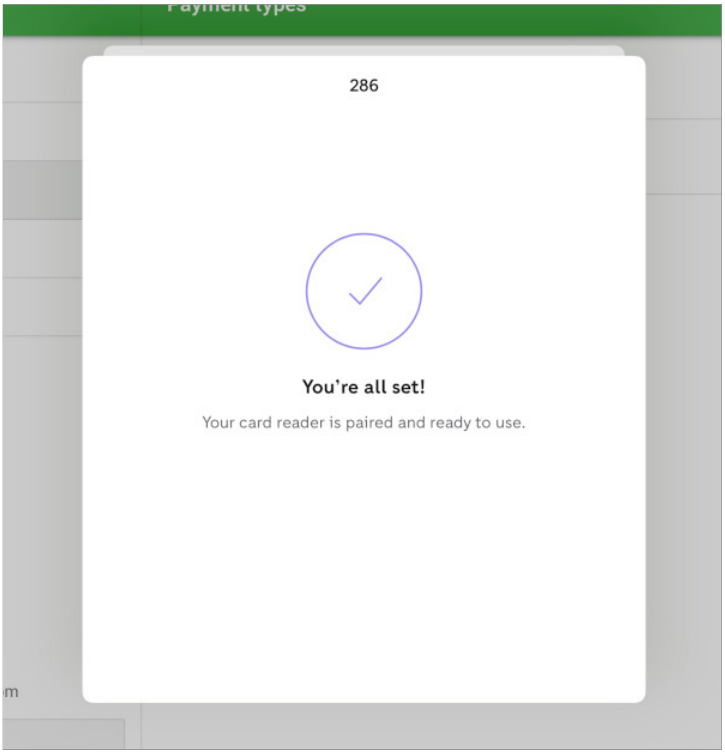
Confirm the connection to the card reader by comparing code and pressing the green button on the card reader.

11



Now your card reader is connected.

12



You are ready to accept card payments.

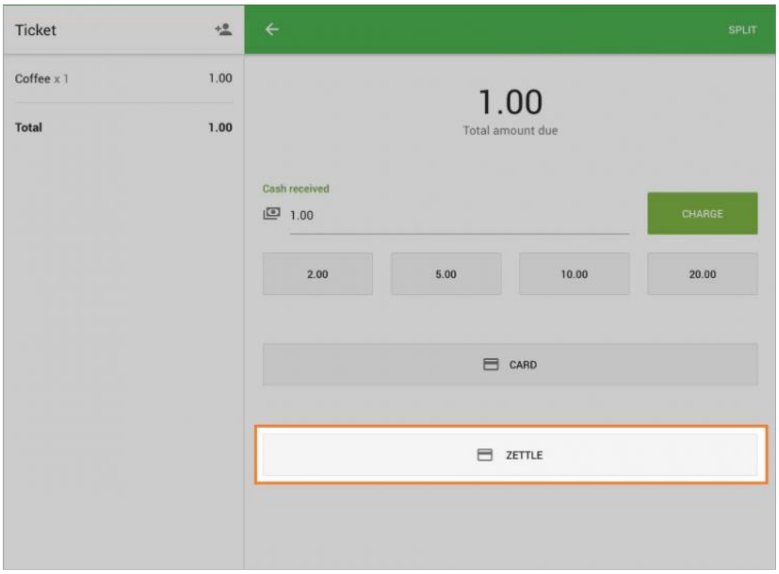
10.3.2 Processing Payments

10.3.2.1 Payment

Add items to the ticket and press ‘Charge’.

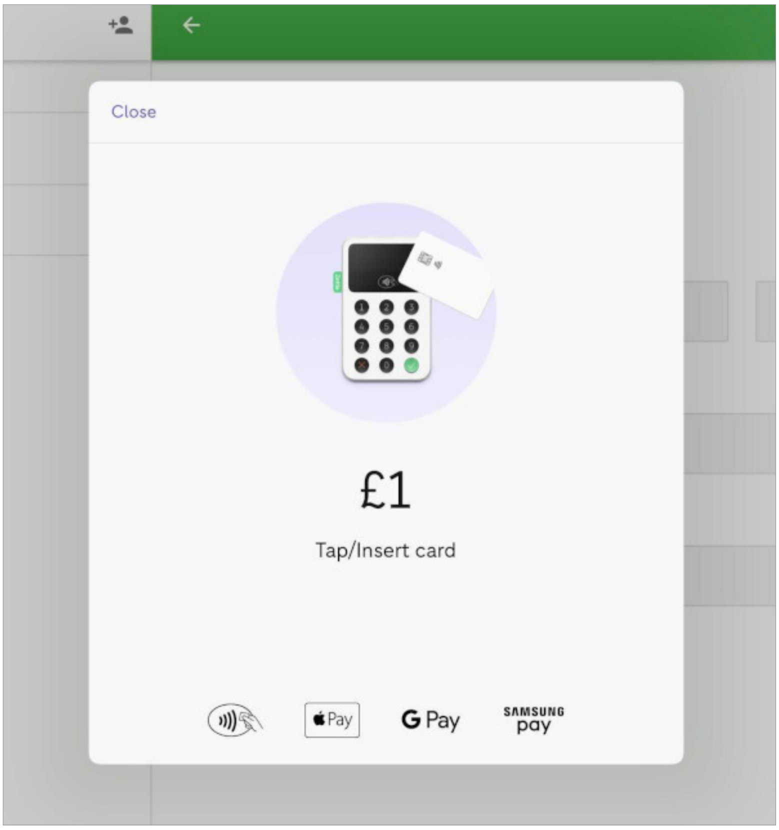
Tap the ‘Zettle’ button selecting payment type.

1



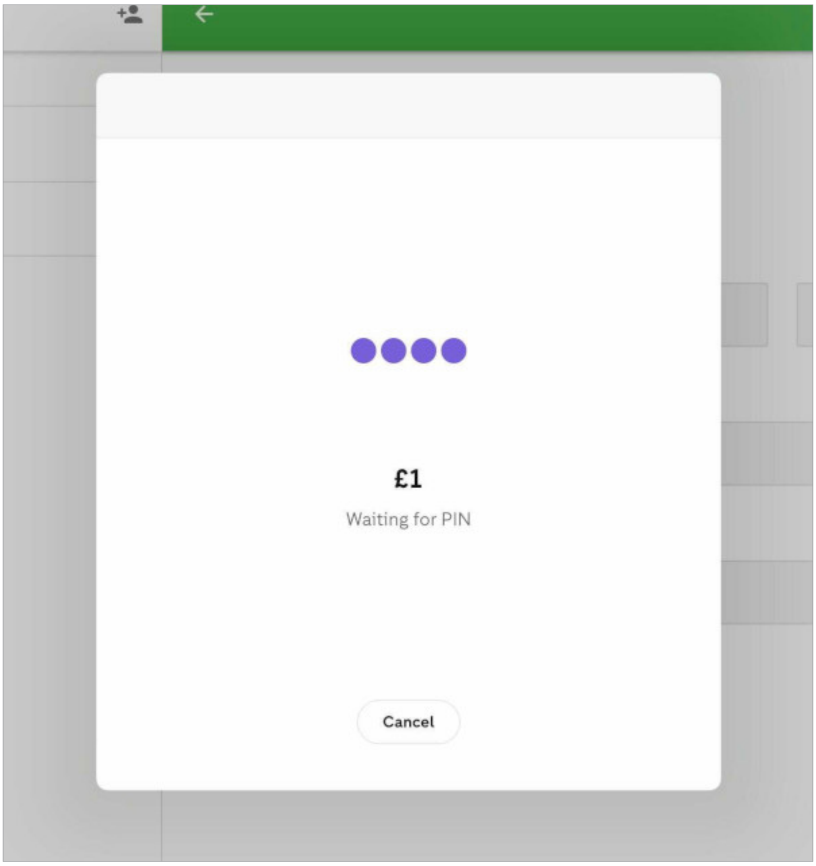
Loyverse POS will wait for a response from the card reader, and you will see an invitation to tap/insert card on the card reader.

2



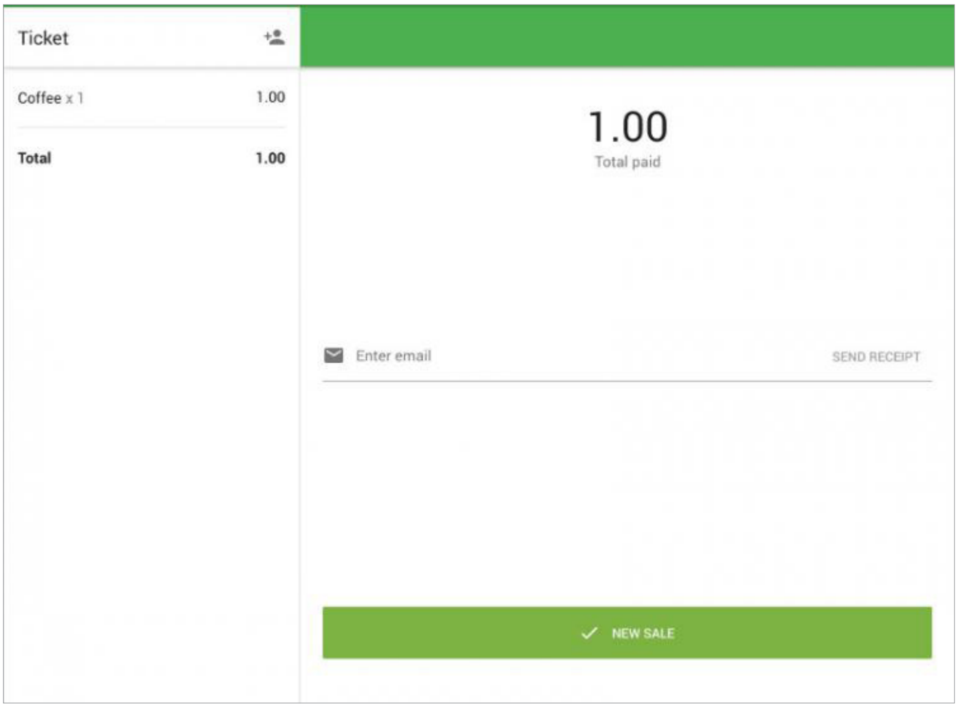
Insert your cards with a chip into the bottom slot of the card reader and give it to the customer to enter the PIN.

3



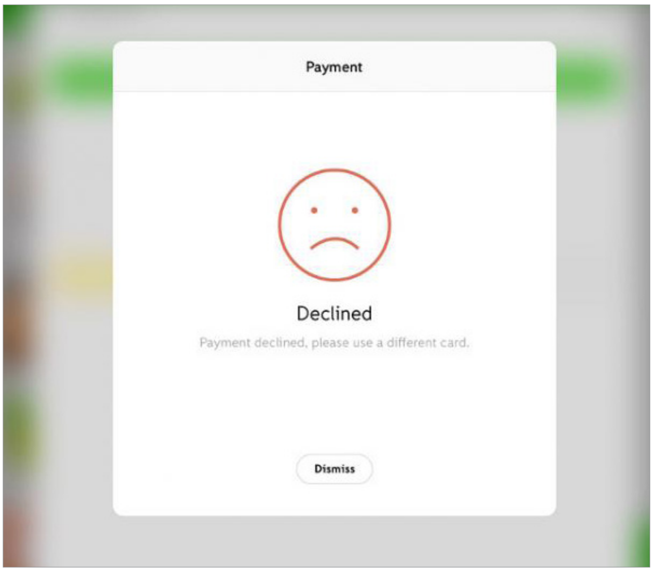
If the transaction is successful, Loyverse POS will display the 'Transaction is successful' screen.

4



In case of an error in the transaction, Loyverse POS will show an error message.

5



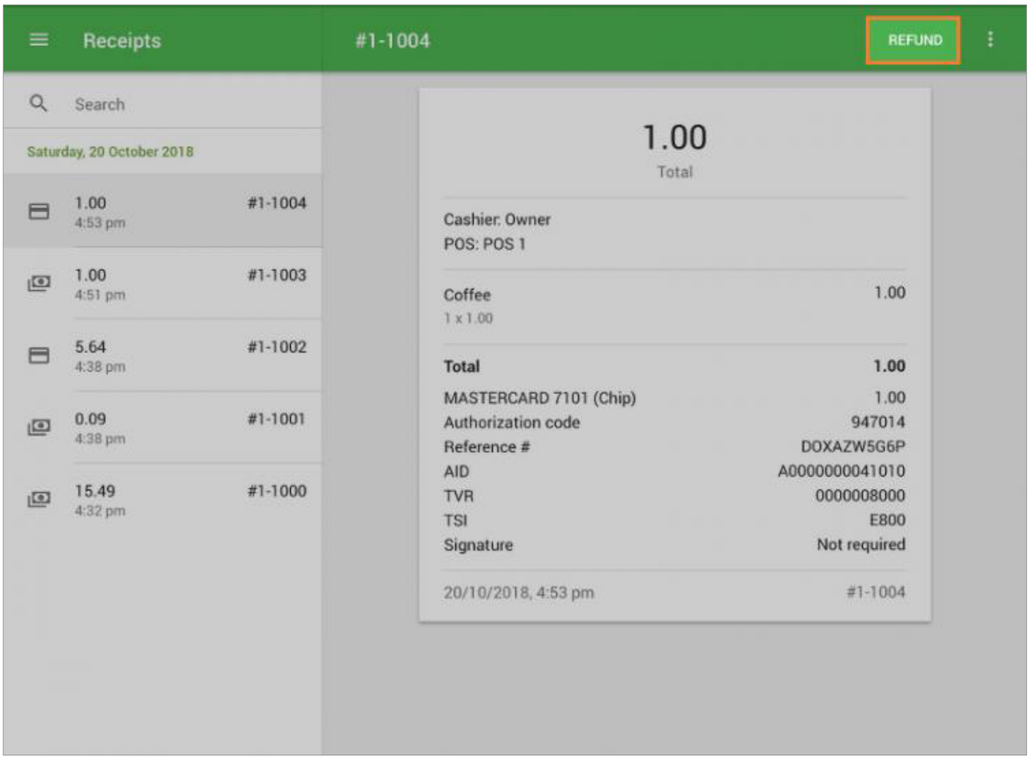
Tap the ‘Dismiss’ button, and you will return to the ‘select payment type’ screen. You can ask the customer to choose a different type of payment (for example ‘Cash’) or try another card.

10.3.2.2 Refund

You can refund the ticket fully or partially. The card reader is not used in the refund process.

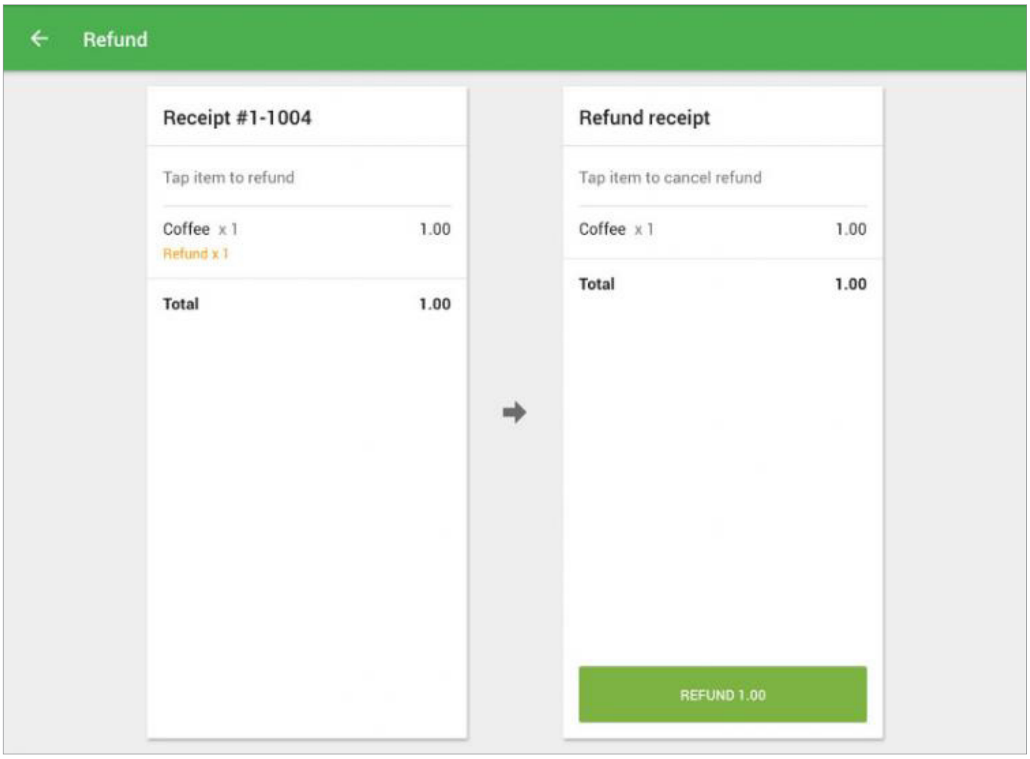
In the Loyverse POS, go to the ‘Receipts’ menu, and tap on the desired receipt.
Then tap ‘Refund’.

1



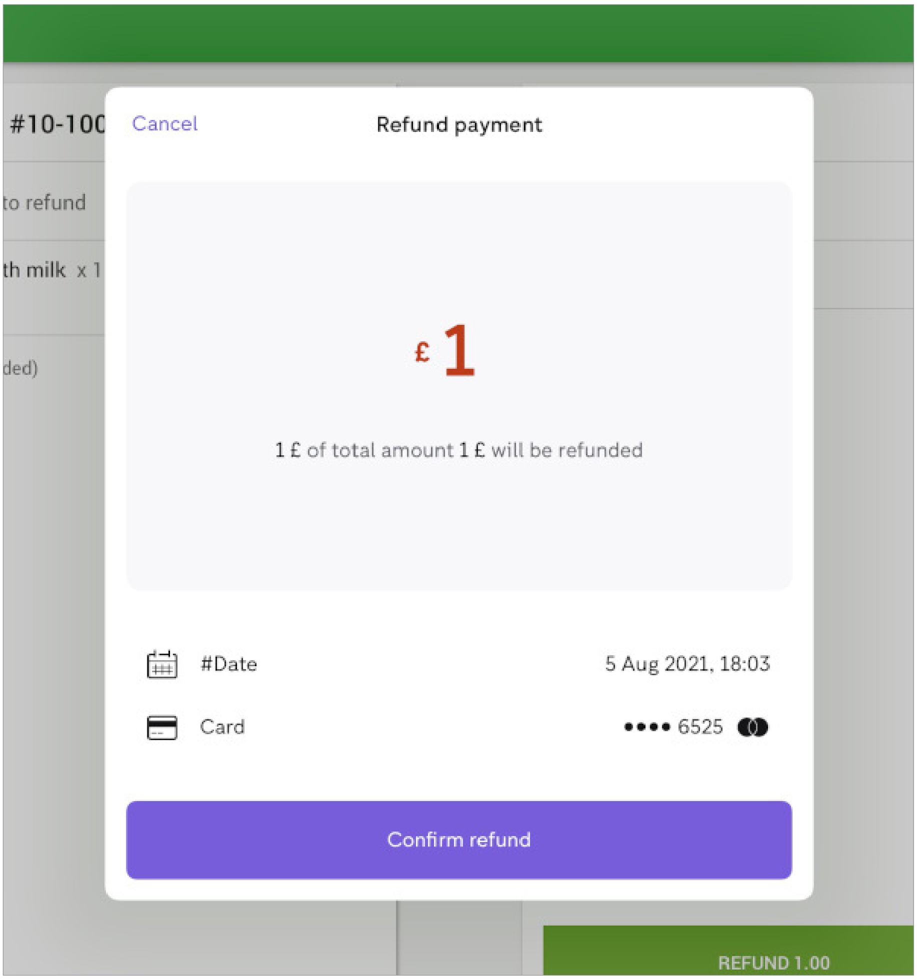
Select all items on the receipt that were paid via card (on the left side) to move them to the 'Refund receipt' list (on the right side), and tap the 'Refund' button.

2



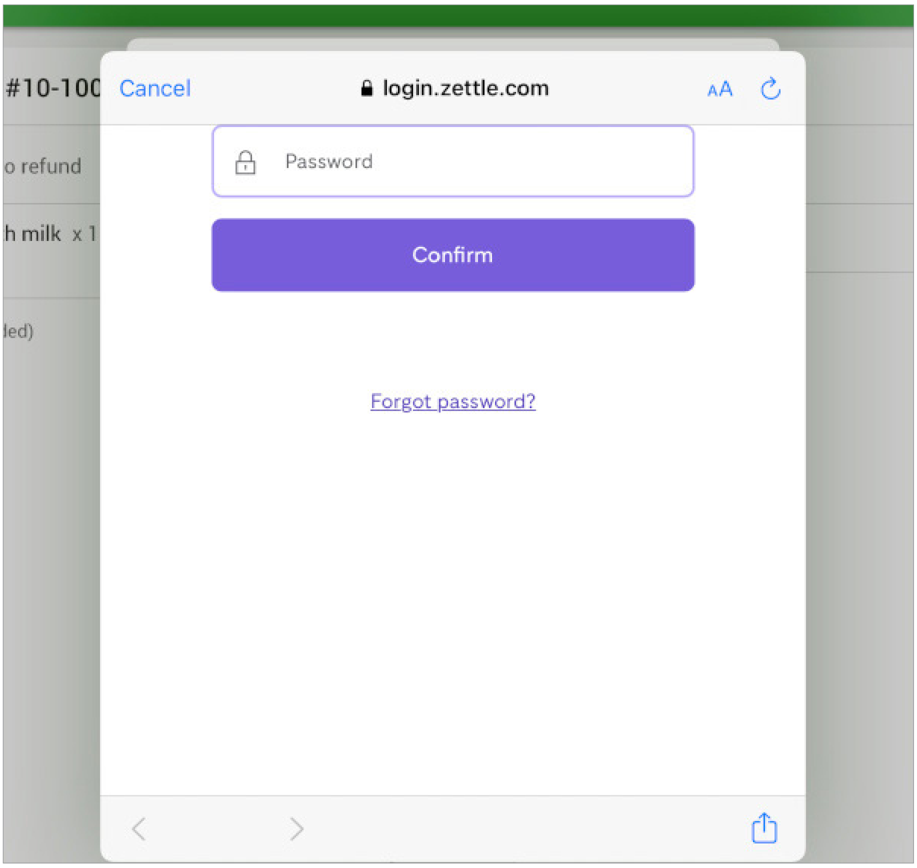
At the 'Refund payment' screen, check the refund details and type the 'Confirm refund' button.

3



Enter the password from the Zettle account in the ‘Password’ field and tap ‘Confirm’.

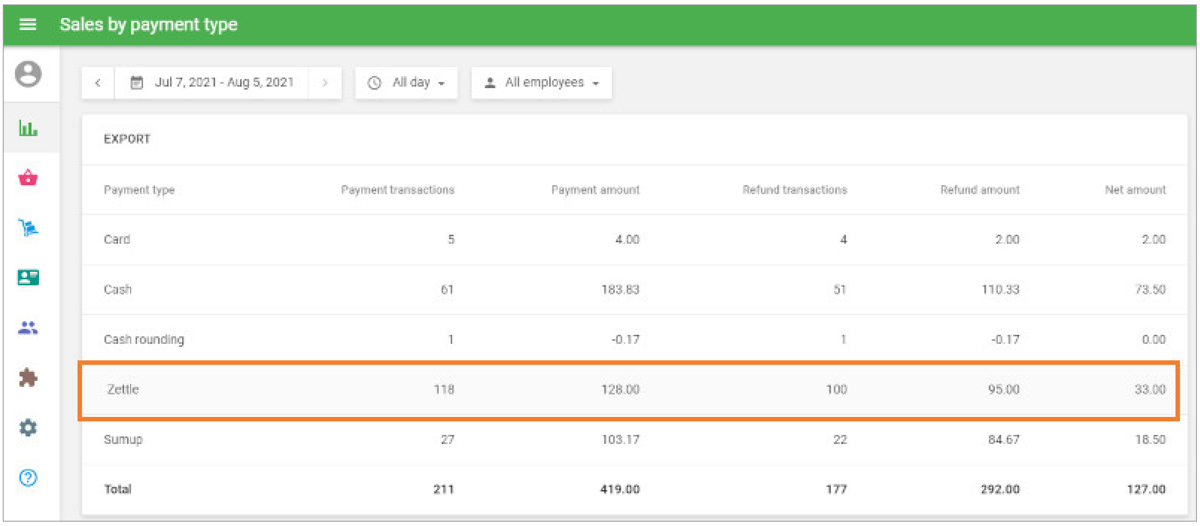
4



10.3.2.3 Reports

You can view the total number of transactions performed with Zettle. In the Back Office, select the ‘Sales by payment type’ report.

1



10.4 How to Add Tips to Payments Made through Card Readers

Some of the card processing systems integrated with Loyverse POS have the possibility to set up tips that the customers can add to the payments.

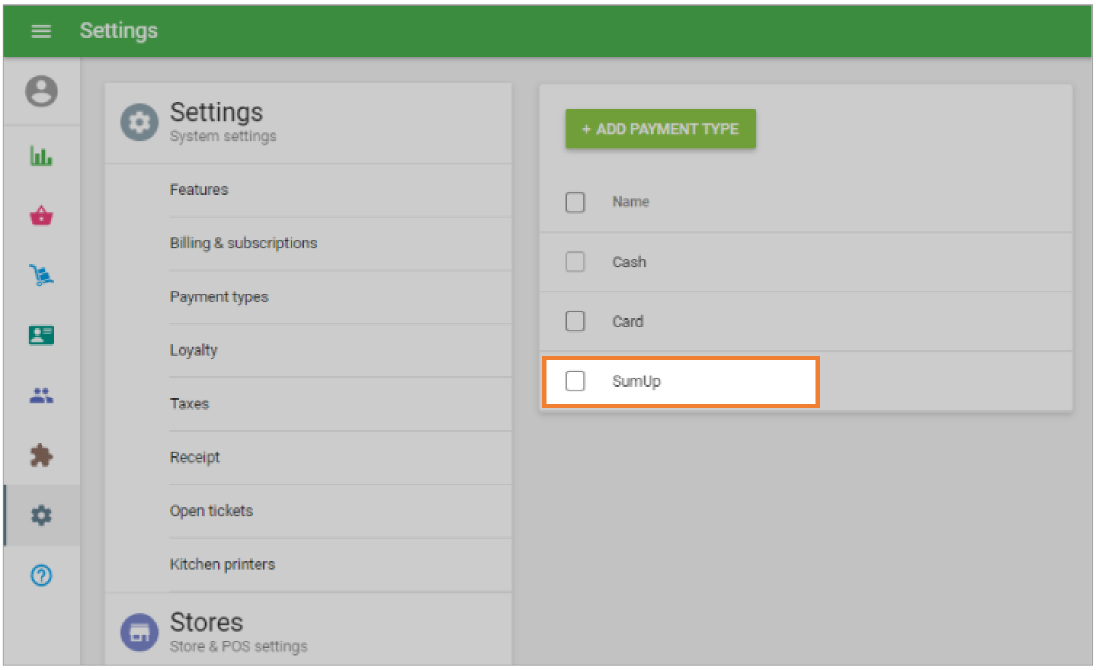
Currently, this functionality is available for SumUp, PayPal Zettle, Yoco, and KICC card readers for iOS devices.

10.4.1 Setting up tips in the Back Office

You can configure the tips that will be displayed on the POS when you choose this payment method.

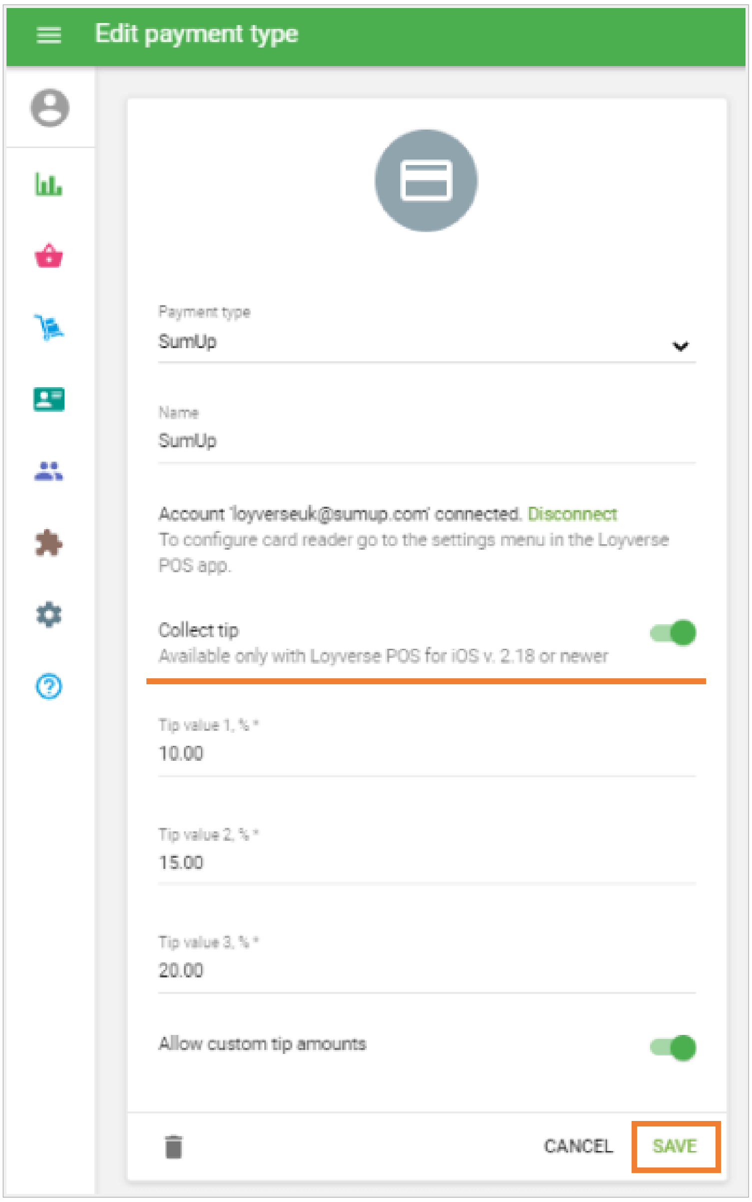
To do this, go to the Settings menu in the Back Office, click 'Payment Types' and then click on the desired card payment type.

1



Turn on the selector ‘Collect tip’. Enter the predefined percentage values of tips.
You can also enable the option ‘Allow custom tip amounts’ that allows customers to choose the tip amount other than the predefined percentage values.

2

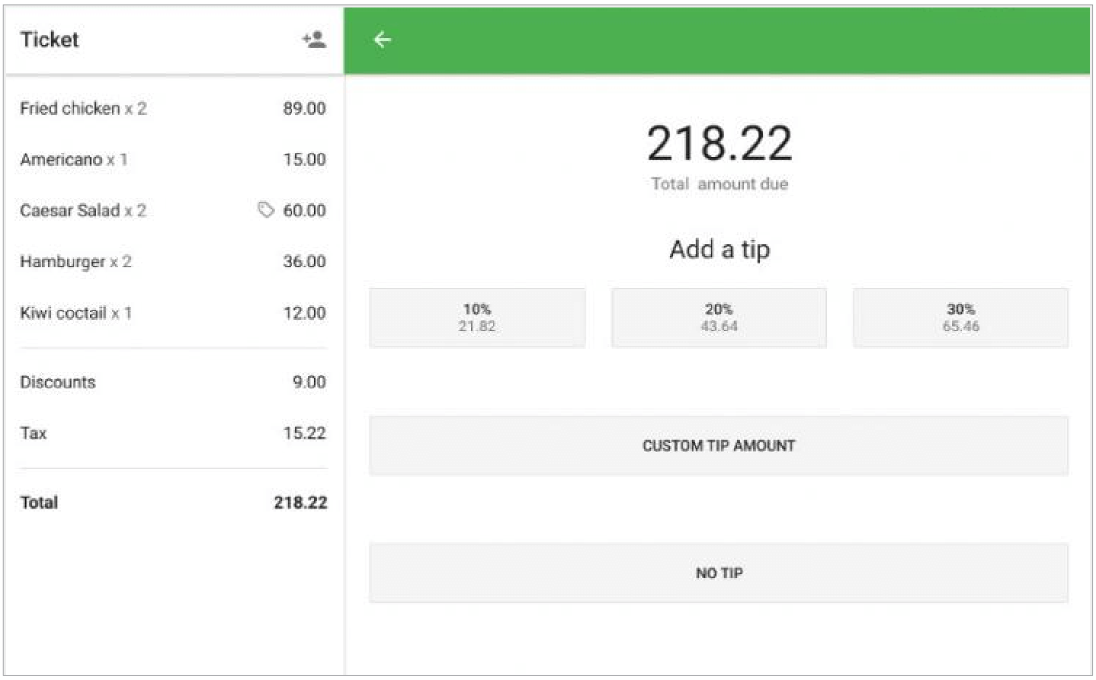


Save your changes when done.

10.4.2 Selecting Tips during Payments

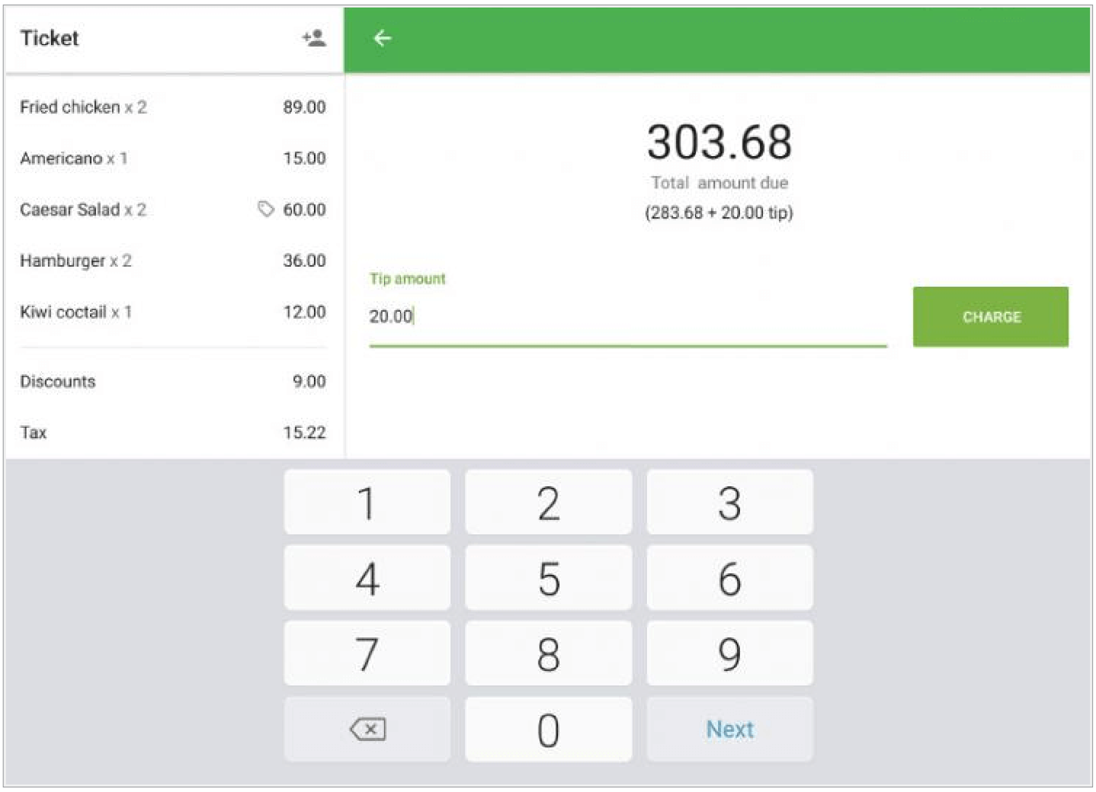
At the POS after selecting the card payment type, you will see the tips selection screen. The cashier can select the tip amount desired by the customer by selecting one of the predefined tips amount in percentage (its actual value will be shown below the percentage).

1



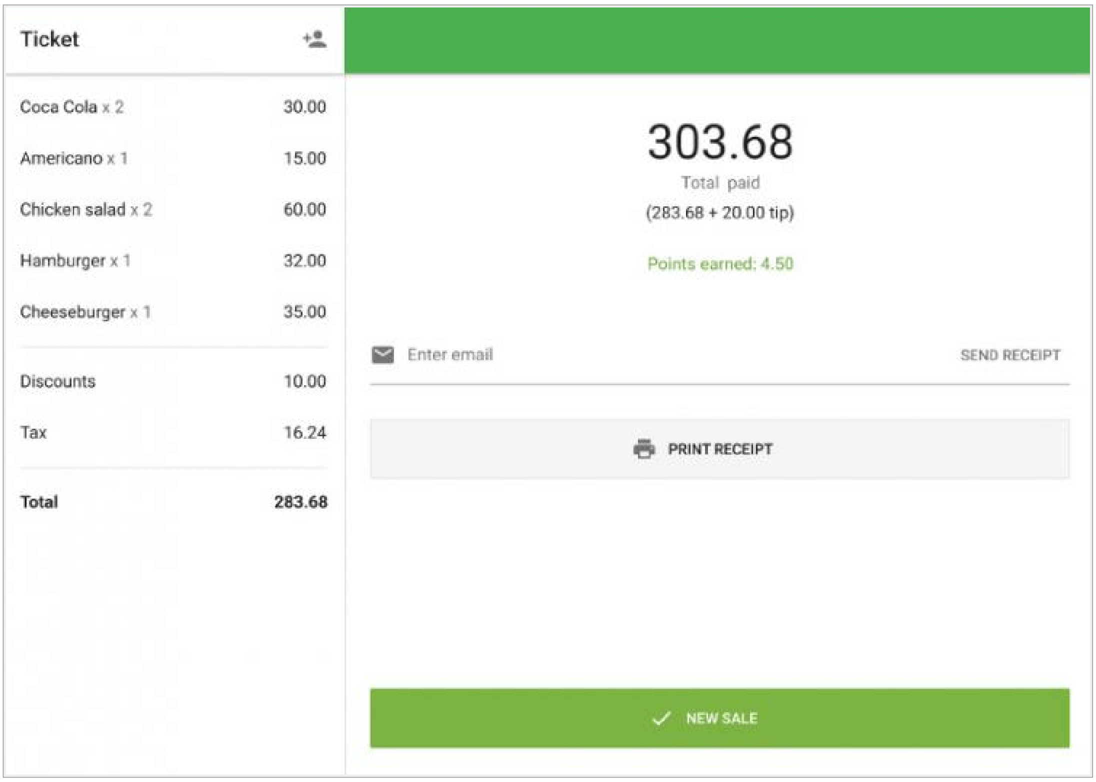
If the 'Custom tip amount' is selected, the cashier can enter the tip value. Tap the 'Charge' button to continue payments through the card reader.

2



After finishing the transaction, on the final screen, you will see the total amount paid with the receipt total and the tip value under it in parentheses. Tap the 'New sale' button to finish the sale.

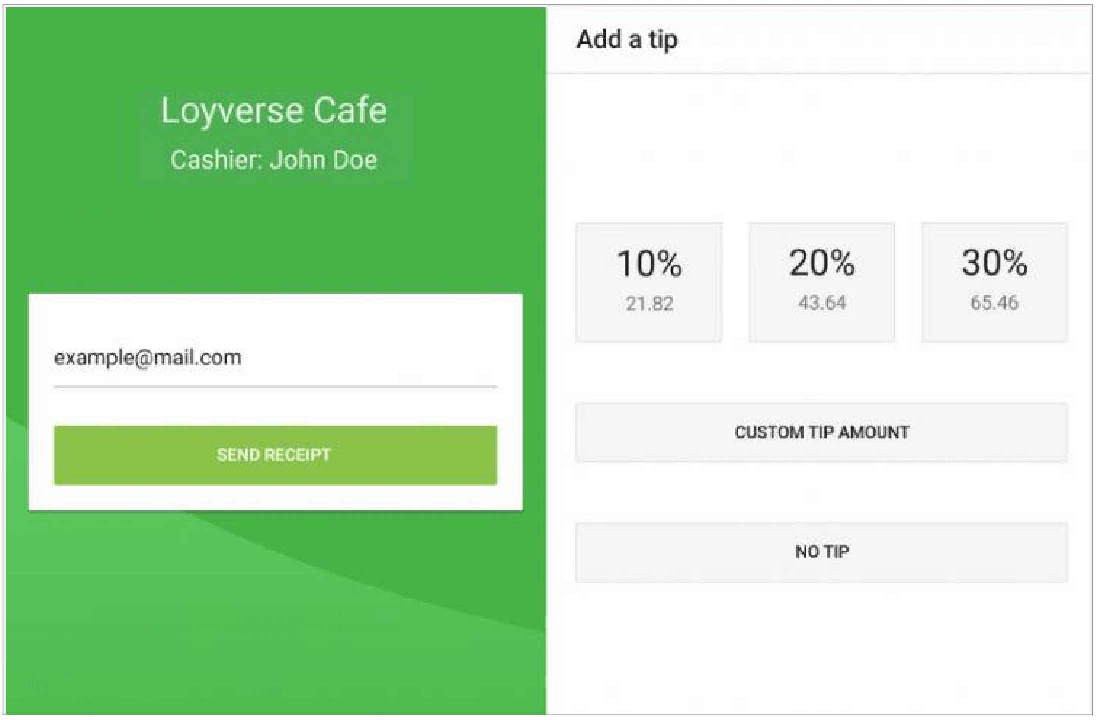
3



10.4.3 Tips on the customer display

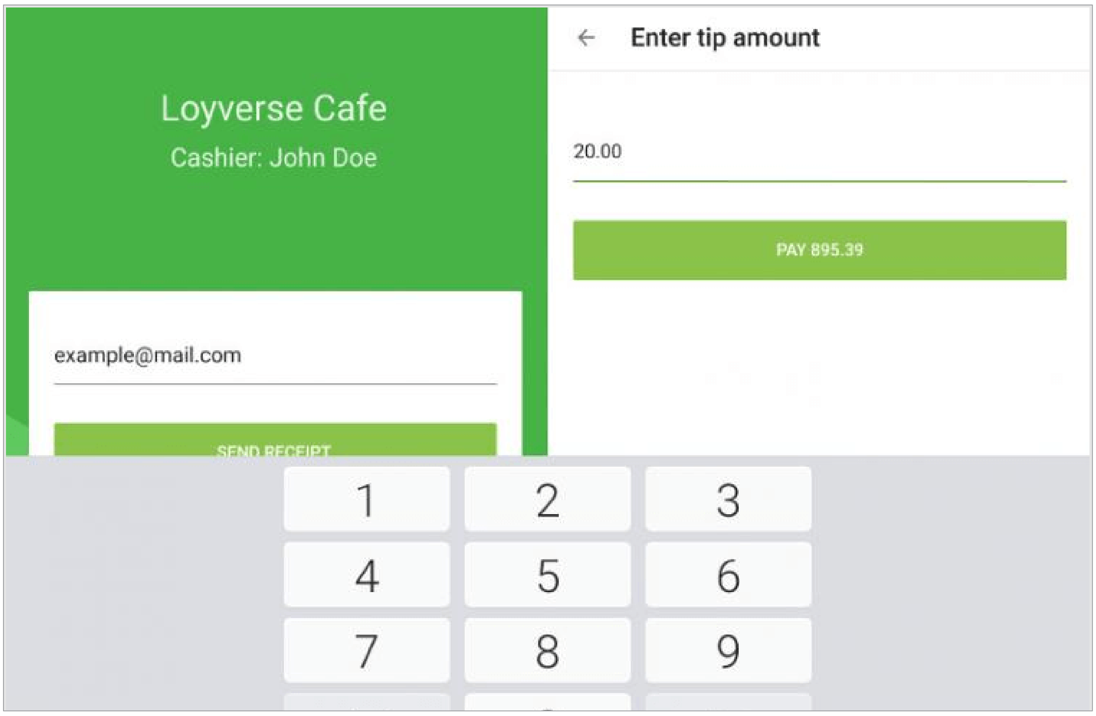
If you have customer display (CDS) connected to your POS, the customer will be able to choose the tips from the predefined percentage values or enter a custom amount on the screen. **Tips are currently shown only on CDS app on iOS devices.** It will be available for Android devices soon.

1



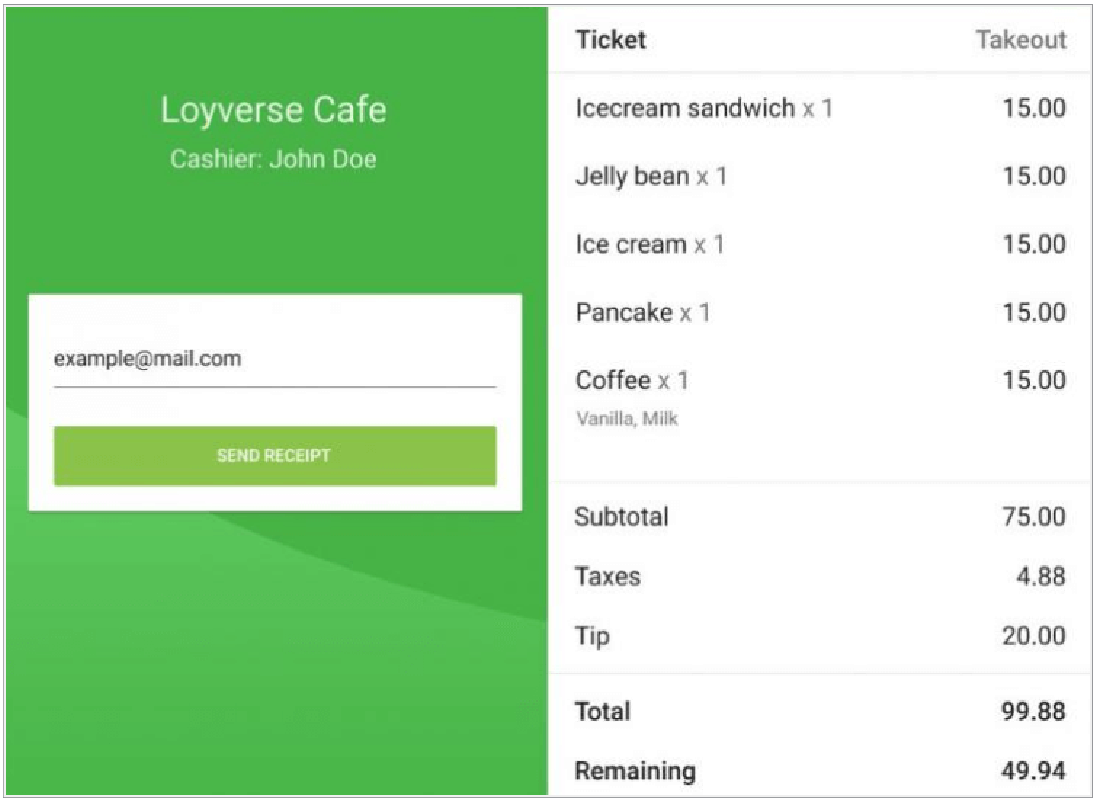
If a customer selects the custom tip amount, he/she can enter the amount and then tap the 'Pay' button to continue the payment through the card reader.

2



After finishing the transaction, the receipt information with tips will be shown.

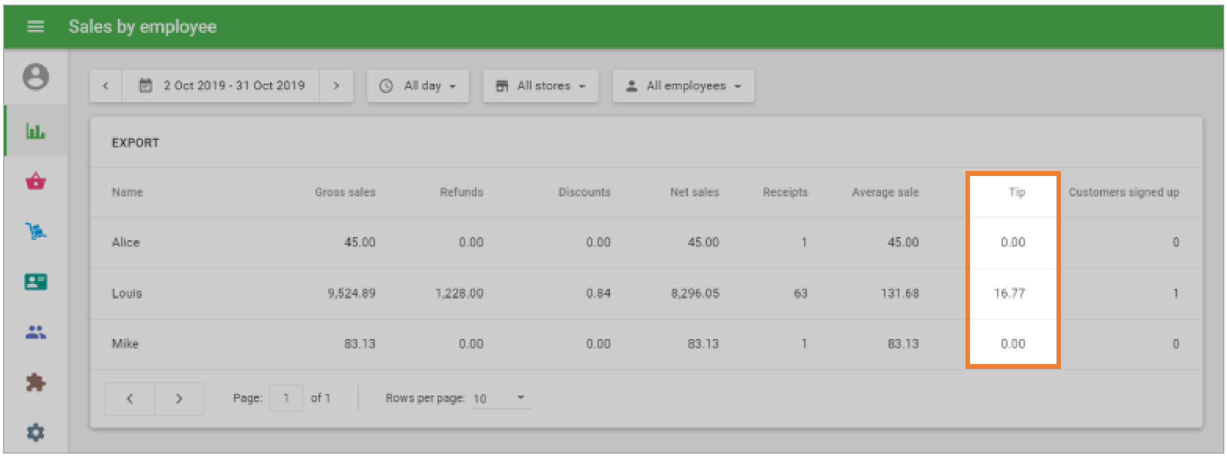
3



10.4.4 Tips at Reports

You can also see the total amount of tips per employee in the Sales by Employee Reports in the Back Office.

1



Also, tips will be shown in the exported files of Receipts and Payment types and also in the Shift report on POS.

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