Paperless Retail™

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CHAPTER 1: Introduction

This manual describes how to configure and use Paperless Retail™ software. The order of chapters, follows the typical process from installation right up to performing the first sales transaction, and finally to the printing of reports.

Paperless Retail™ is user friendly and most of its functions are intuitive / instinctive. This manual is just an overview.

If you feel that you need some additional training, please contact support via email (paperless @byosoftware.co.zw) or via a call (0786404099).

We would be happy to assist.

CHAPTER 2: Installation

Minimum PC specs:

- OS: Windows 7/8.1/10 - 64-Bit/32-Bit
- Memory: 2 GB
- Hard Drive: 0.7 GB of free space

Recommended PC specs:

- OS: Windows 10 - 64-Bit
- Memory: At least 4 GB
- Hard Drive: At least 1.5 GB of free space

Installation procedure

To install Paperless Retail™ you need to have an installation file, and a license key.

The installation file can be downloaded from www.paperless.co.zw. For Windows it is available as a self-extracting archive, which is named, for example paperless_retail_1.0.0.exe.

Double-click this file to initiate the installation. On the website you will always find the latest installation files.

A license key can be acquired from Byo Software or any of its sales agents. To get the contact details for Byo Software visit www.paperless.co.zw or www.byosoftware.co.zw.

CHAPTER 3: Quick start guide

There are a few things that should be configured prior to processing any transactions.

Employee accounts / login

An employee account can have one of the following permissions: **"user"**, **"supervisor"** or **"manager"**.

Users can only perform sales transactions. The only reports they are able to print out, are their personal end of day reports (i.e. x-reports), which give a summary of all the sales transactions they have processed throughout the day.

Managers have access to all of the reports produced by Paperless Retail™ *(see reports section for a list of available reports)*. They can also change the settings *(see the settings section for an overview)*.

Supervisors have permission to do everything that users can do, plus some additional permissions they are given by managers, depending on the settings set by the manager.

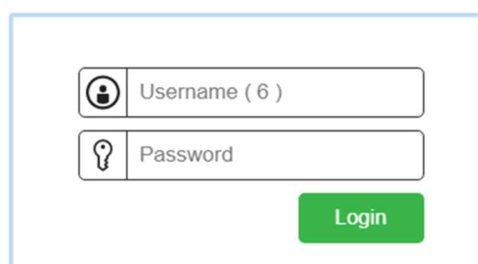
Paperless Retail™ comes with 2 default accounts. We encourage managers to create their own accounts, then delete the default accounts as soon as possible. The login credentials for the default accounts are listed below:

	Default Manager :	**Default User :**
Username	manager	user
Password	password	password

Managers can create new accounts, and can also edit existing accounts. You can use any managerial account to reset the password and or pin for any other account.

If for some reason you are unable to access any of your managerial accounts, please contact Byo Software support.

Each time that you launch Paperless Retail™ you will be prompted to enter your login credentials. This is a security feature and cannot be deactivated.

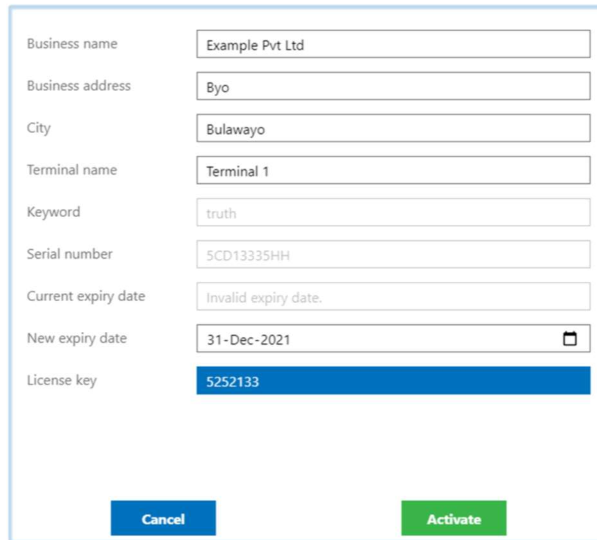


If you are using the software for the first time enter the default login credentials detailed in the section "Employee accounts / login" section.

The license / activation

In an effort to ensure you are happy with our product before you commit to a long term license, we offer a free non-obligation 1-month trial to all prospective customers.

If you are happy about the software, you can buy a 1-year license from Byo Software. Once used a license key cannot be returned for a refund.



Having installed the software and having acquitted a licence key, navigate to the Licensing page by clicking "License" on the menu bar.

Once on the Licensing page you have an opportunity to edit the business name, business address, city and terminal name.

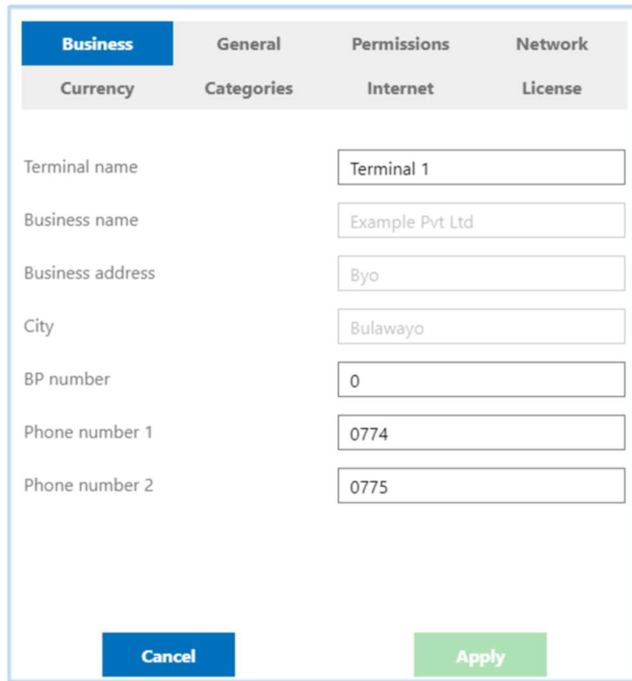
This information will appear on receipts and can only be changed from the licensing page.

Input the "new expiry date" and the "license key" acquired from Byo Software and click "Activate".

Customising the settings

From the homepage, click on “settings” in the menu bar. Settings are divided into 8 sections or tabs.

a) *Business tab*



The Business settings tab has all of the business contact information fields. The business name, business address, city fields cannot be modified from the settings page. These fields appear in the receipt and can only be changed during product activation (when you enter the license key).

b) General tab

Under the general tab is where you will find tax settings.

Here you can also toggle whether or not customers can be assigned to sales transactions.

The general settings tab also contains settings for some additional features e.g. The ability to sell electricity tokens, airtime etc.

c) Permissions tab

Managers can control how much access users and supervisors have in the system via the settings contained under this tab.

d) Network tab

For 2 or more computers to share resources or information, they must be connected to the same network. For client nodes the server IP address and port is set from the network tab.

e) Currency tab

Paperless Retail™ affords retailers the option to use multiple currencies for their transactions. Currency symbols and conversion factors can be changed from the currency settings tab.

f) Categories tab

A maximum of 20 categories can be defined for the items/products sold by the business.

g) Internet tab

These settings relate to external APIs.

h) License tab

Licence variables can be viewed from this tab. When requesting a license key from the Byo Software support team, these variables may be asked of you.

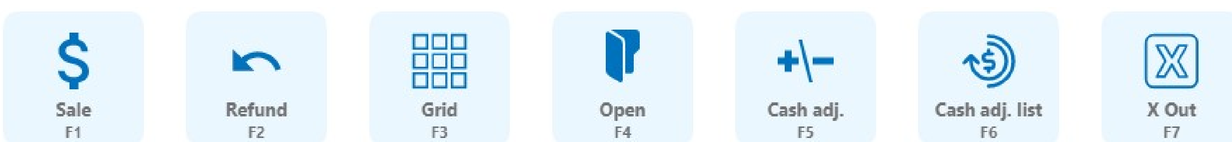
CHAPTER 4: The toolbar

The toolbar is a strip of buttons that can be clicked to perform certain functions. It is located at the top of the page. Different pages have different toolbar buttons.

The homepage has 3 different toolbars. At any given time only one of the toolbars can be seen.

	Appears when :
Landing toolbar	* the landing page is opened. * after pressing the Void toolbar button.
Sale toolbar	* after pressing the Sale toolbar button. * after a product is added to the cart.
Refund toolbar	* after pressing the Refund toolbar button.

<u>Landing toolbar</u>



a) *sale button*

Clicking the sale button signals the beginning of a sales transaction. The landing toolbar is replaced by the sale toolbar after this button is clicked.

b) *refund button*

Clicking the refund button signals the beginning of a refund transaction. The landing toolbar is replaced by the refund toolbar after this button is clicked.

c) *grid button*

The grid contains a selection of popular products. Clicking the grid button opens the grid page.

d) *open button*

This button is used to view saved transactions. From the list of saved transaction that appear, you can select a particular sales transaction that you want to open.

e) *cash adjustments button*

Everyone runs out of singles every now and again. Every time cash is removed from or added to the cash register, you record the movement by first clicking the cash adjustment button.

f) *cash adjustments list button*

Clicking this button shows a record of cash drawer adjustments made by the employee that is currently logged in.

g) *x out button*

Clicking this button prints a report showing the sales transactions that have been processed by the employee since the beginning of the day.

<u>Sale toolbar</u>

a) *void button*

This button clears any transaction that is in progress and resets the system. The sale toolbar is replaced by the landing toolbar after this button is clicked.

b) *delete button*

Removes the highlighted/selected object from the ongoing transaction.

c) *grid button (see description in landing toolbar)*
d) *quantity button*

Opens the number pad that is used to change the quantity of the highlighted/selected item from the cart.

e) *notes button*

Opens a text pad that can be used to add notes to a transaction.

f) *Add customer button*

Is used to assign a customer to a transaction.

g) *save button*

Clicking this button saves the ongoing transaction. The sale toolbar is replaced by the landing toolbar after the transaction is saved.

h) *process button*

The sale button is grey at the beginning of a transaction. At this stage (when it is grey) it does not respond to clicks.

It turns green after items have been added to the cart *and sufficient payments have been made*. When the process button is green and clicked, the sales transaction is saved, and a receipt is printed.

Refund toolbar

a) *void button (see description in sale toolbar)*
b) *quantity button (see description in sale toolbar)*
c) *notes button (see description in sale toolbar)*
d) *process button (see description in sale toolbar)*

CHAPTER 5: Processing transactions

A user can perform 2 types of transactions: a sale or a refund. While sales can be processed by any user, refunds can only be processed by supervisors.

There are 3 ways to add an item to a transaction (sale or refund):

1. Scan an item using a barcode scanner
2. Search by item description in the "Product search" input field
3. Search by SKU in the "Product search" input field
4. Click the item from the Grid. The grid is accessed by pressing the Grid toolbar button.

Besides selecting from the grid (option 4), all other methods for selecting a product can only work when the focus is on the "Product search" field. The cursor in the "Product search" field should be blinking. A blinking cursor in the "Product search" field shows that the search field is in focus.

To add a customer to a transaction, click the "Add Customer" button in the toolbar.

After adding items to the cart, the next step is adding a payment.

Active payment methods are blue while inactive payment methods are grey.

After clicking a payment method, an on-screen number pad is displayed. After the assignment of the payment types, click Process transaction. If a thermal printer is connected, the receipt is printed at this stage.

CHAPTER 6: Reports

Paperless Retail™ has numerous reports. It also provides X-out and Z-out functionality. When a user performs an X-out, they receive a report showing the sales transactions they processed since the beginning of the day.

On the other hand, a Z-out can only be printed by a supervisor or manager, and prints a report for sales transactions processed by the entire store (all employees included) in that particular day.

The names of the reports in the menu are very descriptive to assist in finding the report that you are looking for.

1. Transactions list
    - Detailed
    - Summarised
2. Sales reports
    - Detailed
    - Summarised
    - Refunds – by product
3. Customer reports
    - Detailed
    - Summarised
4. Supplier reports
    - Detailed – by supplier
    - Summarised – by supplier
    - Summarised – combined
5. Employee reports
    - Detailed
    - Summarised
    - Cash drawer adjustments
6. Inventory
    - Stocktake
        - Stocktake sheet
        - Stocktake results
    - Inventory report
        - Detailed
        - On hand adjustments
    - Goods received
        - All
        - By product
    - Goods reordered
        - All
        - Zero on hand report
    - Popular products
        - Top 10 best sellers
        - Top 25 best sellers

