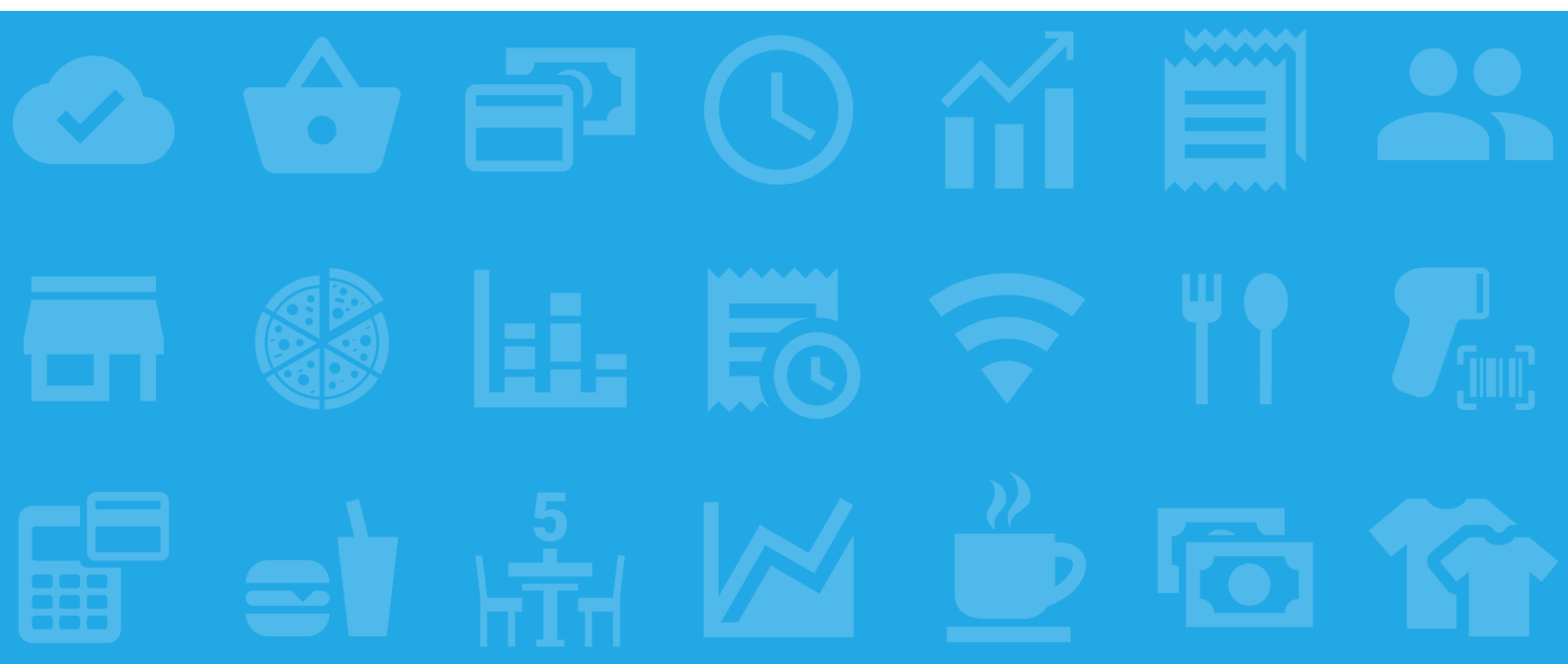




# POS System and Inventory Management



## User guide

**Last updated: March 2024**



# Content

## 1. Getting Started

1.1 How to Get Started with Loyverse POS	9
1.2 Setting Up Your Shop in Loyverse Back Office	10
1.2.1 Store Information	11
1.3 How to Add Items and Categories in Loyverse POS	13
1.3.1 Adding items	13
1.3.2 Adding Categories	14
1.4 How to Add Items in the Loyverse Back Office	15
1.5 How to Configure Taxes in Loyverse	19
1.5.1 How to Configure Taxes in the Back Office	19
1.5.2 How to Set Up Taxes in POS	21
1.6 How to Create and Configure Discounts	24
1.6.1 Discount set up in the Back Office	24
1.6.2 Discount set up in the mobile application	25
1.7 How to Make Sales	26

## 2. Sales

2.1 How to Arrange Sale Screen in Loyverse POS	31
2.1.1 Organizing of Items	31
2.1.2 Organizing Pages	33
2.2 How to Change Home Sale Screen Layout	35
2.2.1 Sale screen item layout for tablets	35
2.2.2 Sale screen item layout for smartphones	36
2.3 How to Apply Discounts During a Sale	37
2.4 How to Sell Items Using Barcode Scanners	40
2.5 How to Scan Barcodes with Embedded Weight	41
2.6 Barcodes Scanning by Built-in Device Camera	43
2.6.1 Selling Items	43
2.6.2 Adding Barcodes to Items	44
2.7 How to Sell Items by Weight	45
2.8 How to sell liquids	47
2.8.1 Through selling by weight option	47
2.8.2 Selling like composite item	48
2.9 How to Split Payment with Loyverse POS	49
2.10 Open Tickets	51
2.10.1 Settings	51
2.10.2 Open ticket creation	51
2.10.3 Searching and editing	52
2.10.4 Assigning and Removal	53
2.11 How to Merge Open Tickets with Loyverse POS	54
2.11.1 Merging tickets in the open tickets list.	54
2.11.2 Merging tickets in the sale screen	55

2.12 How to Split an Open Ticket with Loyverse POS	57
2.13 Open Tickets Synchronization	59
2.14 How to Use Predefined Open Tickets to Name Tables	60
2.14.1 Configuration	60
2.14.2 Creating Open Tickets	61
2.14.3 Editing Open Tickets	62
2.15 How to Print Bill	64
2.16 How to Set Up and Apply the Modifiers	65
2.16.1 Creation and set-up of modifier	65
2.16.2 Sales and reports	66
2.17 How to Issue a Refund on Loyverse POS	67
2.18 Shift Management in Loyverse POS	69
2.19 Dining Options	74
2.19.1 Configuration of Dining Options	74
2.19.2 Using Dining Options during Sale	75
2.20 Negative Stock Alerts	77
2.21 Receipts List in the POS	78
2.22 Offline Use of Loyverse POS	80

## 3. Items

3.1 Working with the Items List in the POS	83
3.2 How to Add Barcodes to Items	85
3.2.1 How to add item barcode in the Back Office	85
3.2.2 How to add barcodes using Loyverse POS app	86
3.3 How to Use Variants of Items	86
3.3.1 Creation and set-up of Variants	86
3.3.2 Variants at Sale and Report	89
3.3.3 Export-Import of Variants	90
3.4 How to Create a Composite Item	90
3.5 Notification About Low Stock	93
3.6 Exporting and Importing Items	95
3.6.1 Features of different types of items	96
3.6.2 Import of items	97
3.6.3 The meaning of columns	99

## 4. Advanced Inventory

4.1 What is Advanced Inventory Management	101
4.2 How to Work with Purchase Orders and Suppliers	103
4.2.1 Suppliers	103
4.2.2 Making purchase orders	105
4.2.3 Actions with the purchase order	108
4.3 Autofill of the Items in the Purchase Order	110
4.4 How to Work with Additional Costs in the Purchase Orders	111
4.5 How to Work with Transfer Orders	114
4.6 How to Work with Stock Adjustments	117
4.7 How to Work with Inventory Count	120
4.8 How to Work with Production	124
4.9 How to Print Labels for Items	129
4.10 What is Inventory History	132
4.11 What is Inventory Valuation Report	134
4.12 How to Order Items by Boxes, and then Sell them by the Piece	135



## 5. Employees

5.1 How to Add an Employee in Loyverse	139
5.2 How to Manage Access Rights of Employees	142
5.2.1 POS access rights	143
5.2.2 Back Office access rights	144
5.3 How to Give Employees Access to Login into Loyverse POS through E-mail	146
5.3.1 Make access rights for group	146
5.3.2 Assign employee to the group	147
5.3.3 Creating password by employee	148
5.3.4 Login into Loyverse POS	149
5.4 How to Switch User Account to Different Employee in the Opened Loyverse POS	150
5.5 Using Time Clock to Track Employees Hours	151
5.5.1 Configuration	151
5.5.2 Using at POS	151
5.5.3 Reports at the Back Office	153
5.6 How to Manage PIN Code Access	155
5.6.1 How to find and change the PIN	155
5.6.2 How to remove the PIN	157

## 6. Customers

6.1 How to Set Up a Customer Loyalty Program	159
6.2 How to Sign Up a Customer in Loyverse POS	160
6.3 How to Redeem Customer Points for a Discount	162
6.4 How to Send E-mail with Receipt to Client in Loyverse POS	164
6.5 Information about the Customer and Comments in the Receipt	165
6.6 Customer Identification by Phone Number	168
6.7 How to Work with Customer Base in the Back office	170
6.8 Purchase History of a Registered Customer in the POS	172
6.9 Importing and Exporting Customers	174
6.10 How to Add the Customer to the Receipt by Scanning a Barcode	176
6.11 How to See the Purchase History of Registered Customers at the Back Office	180
6.12 How to Delete Customers from the Base	183
6.13 Customer Display System Configuration Guide	184
6.13.1 Install Loyverse CDS app	184
6.13.2 Activate option for using CDS	185
6.13.3 Pair customer display with Loyverse POS	185
6.14 How Loyverse CDS Customer Display Works	188

## 7. Reports

7.1 Sales Summary Report in the Back Office	191
7.2 Sales by Item Report in the Back Office	194
7.3 Sales Report by Category	197
7.4 Receipts Section in the Reports in the Back Office	199
7.5 How to Cancel Receipts in Loyverse Back Office	201
7.6 Shift Report with Sales Summary at the POS	204
7.7 How to Work with Shift History in the POS	206
7.8 How Taxes are Calculated	207
7.8.1 Calculation of 'added to the price' tax	207
7.8.2 Calculation of 'included in the price' tax	208
7.8.3 Application of several taxes at the same time	209

7.9 How to Export Data from Reports and Open in Excel	211
7.10 How to Export Data from Reports and Open in LibreOffice Calc or OpenOffice Calc	213
7.11 How to Open CSV File in Google Sheets	215
7.12 Using Loyverse Dashboard	218
7.12.1 Stock Alerts	221
7.13 How to Connect Apps from the Marketplace to Loyverse	224
7.14 How to Create Tokens for API	227
7.15 How to See the Purchase History of Registered Customers at the Back Office	229

## 8. Settings

8.1 Configuring Payment Types in Loyverse POS	233
8.2 How to Create, Activate, Deactivate and Delete POS	236
8.2.1 How to Create new POS	236
8.2.2 How to Activate POS	237
8.2.3 How to Deactivate POS	238
8.2.4 How to delete POS	239
8.3 How to Create and Manage Multiple Stores under One Account	240
8.3.1 Adding a new store	240
8.3.2 Items management	241
8.3.3 Employee management	241
8.3.4 Sales reports	242
8.3.5 Customers	242
8.4 How to Add Logo to the Receipts	243
8.5 How to Sign out from Loyverse POS	245
8.6 How to Exit from Back Office	247
8.7 How to Set the Currency	248
8.8 How to Work with Cash Rounding	250
8.9 How to Change/Recover Your Password for the Back Office	254
8.10 How to Apply Taxes Depending on the Dining Options	258
8.11 How to Change Language	261
8.11.1 Changing Language in Loyverse POS app	261
8.11.2 Setting Language in the Back office	262
8.11.3 Receipt Language	262
8.12 How to Use Add-on Services of Loyverse POS	263
8.12.1 Trial period	263
8.12.2 Subscription to Employee management	265
8.12.3 Subscription for Advanced inventory	266
8.12.4 Subscription for Integrations	267
8.12.5 Adding payment method	268
8.12.6 Payments for subscriptions	269
8.12.7 Unsubscribing	270
8.13 How to Manage Account Settings in the Back Office	272
8.14 How to Increase the Font Size on Android Devices	273
8.15 How to Delete Loyverse Account	275
8.15.1 Deleting account at Loyverse POS app	275
8.15.2 Deleting account at the Back office	276
8.16 How to Export Data from Loyverse Account	278
8.16.1 Exporting Items List	278
8.16.2 Exporting Customers List	278
8.16.3 Exporting Receipts List	279
8.16.4 Exporting Reports	280
8.16.5 Exporting Reports and Documents of the Advanced Inventory	281

## 9. Hardware

9.1 Supported Printers	284
9.1.1 Supported Printers for Android	284
9.1.2 Supported Printers for iOS	285
9.2 How to Set Up an Ethernet Printer in Loyverse POS	285
9.3 How to Set Up Bluetooth Receipt Printer with Loyverse POS	289
9.4 How to Set Up a USB Printer with an iOS Device	292
9.5 How to Set Up a USB Printer with an Android Device	296
9.6 How to Set Up Other Printers in Loyverse POS on Android	299
9.7 How to Set Up Other Printers in Loyverse POS on iOS	303
9.8 Using Kitchen Printers with Loyverse POS	306
9.8.1 Configuring Loyverse Back Office	306
9.8.2 Setting Up the Loyverse POS App	308
9.9 Troubleshooting When Setting Up an Ethernet Printer	311
Testing hardware issues	311
Network related issues	311
9.10 Connecting Built-in Printers on Sunmi Devices	314
9.11 How to Set Up Kitchen Printer for Each Kitchen Station	317
9.12 How to Set Up Multiple Kitchen Stations to Share One Printer	319
9.13 How to Connect Kitchen Printer Bell (Buzzer)	321
9.14 Supported Barcode Scanners	323
9.15 How to Connect a USB Barcode Scanner to an Android Device	323
9.16 How to Setup Motorola CS3070 (Bluetooth) Barcode Scanner	324
9.17 Socket 7Qi/7Ci (Bluetooth) Barcode Scanner Setup	325
9.17.1 Connecting scanner to Android Mobile Device	325
9.17.2 Connecting scanner to Apple iOS device	326
9.18 Supported Cash Drawers	327
9.19 How to Connect a Cash Drawer	327
9.19.1 How to open cash drawer without making a sale	329
9.20 How to Use Loyverse KDS Kitchen Display	330
9.21 Kitchen Display System Configuration Guide	332
9.21.1 Install Loyverse KDS app	332
9.21.2 Specify a device name	332
9.21.3 Configure Loyverse KDS app	333
9.21.4 Create a printer group	334
9.21.5 Pair kitchen display with Loyverse POS	335
9.22 Troubleshooting When Working with KDS	338
9.22.1 Separate Router	338
9.22.2 Assign a static IP address to the kitchen display tablet	338

## 10. Payment

10.1 How to Work with Credit Card Payments	341
10.2 How to Accept Credit Cards with Loyverse POS and SumUp	343
10.2.1 Connecting Card Reader	343
10.2.1.1 Creating a payment type	343
10.2.1.2 Connecting with iOS devices	345
10.2.1.3 Connecting with Android devices	347
10.2.2 Processing Payments	349
10.2.2.1 Payment	349
10.2.2.2 Refund	351
10.2.2.3 Reports	352

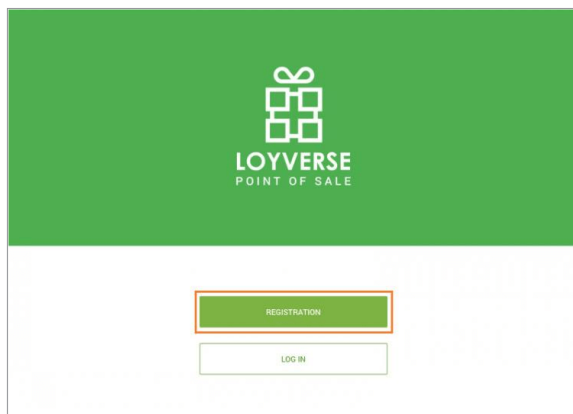
10.3 How to Accept Credit Cards with Loyverse POS and PayPal Zettle	352
10.3.1 Connecting the Card Reader	353
10.3.2 Processing Payments	358
10.3.2.1 Payment	358
10.3.2.2 Refund	360
10.3.2.3 Reports	362
10.4 How to Accept Credit Cards with Loyverse POS and Yoco	363
10.4.1 Connecting the Card Reader	363
10.4.2 Processing Payments	366
10.4.3 Reports	369
10.5 How to Accept Credit Cards with Loyverse POS and Tyro	370
10.5.1 Connecting Tyro Terminal	370
10.5.2 Processing Payments	373
10.6 How to Accept Credit Cards with Loyverse POS and Smartpay	377
10.6.1 Connecting the terminal	377
10.6.2 Processing Payments	379
10.7 How to Add Tips to Payments Made through Card Readers	384
10.7.1 Setting up tips in the Back Office	384
10.7.2 Selecting Tips during Payments	386
10.7.3 Tips on the customer display	387
10.7.4 Tips at Reports	389

# 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 12.0+.

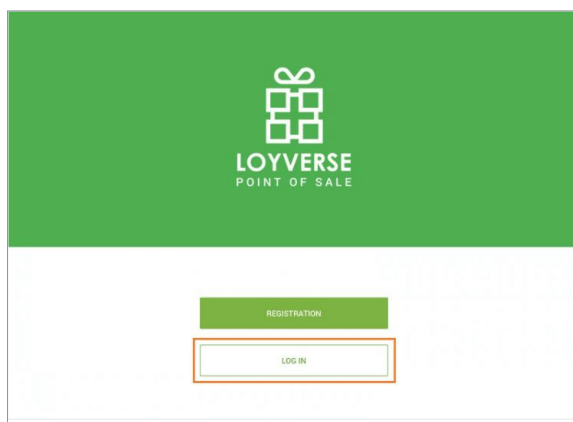
**Note:** The same Loyverse POS app can work in different types of business: [retail](#), [grocery stores](#), [boutiques](#), [restaurants](#), [cafes](#), [bars](#), and many others. There are various settings at the Back office that allow adjusting the Loyverse POS to your needs.

2

When you run the application, you will see the welcoming screen. If you have not yet [registered on the web-site](#), you can register now by tapping on the 'Registration' button.

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

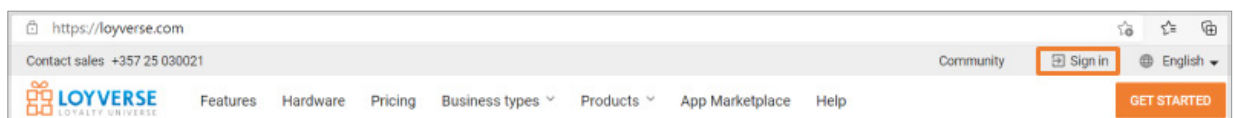
The Back Office is your web-based office, working in synchronization with the Loyverse POS App

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'.

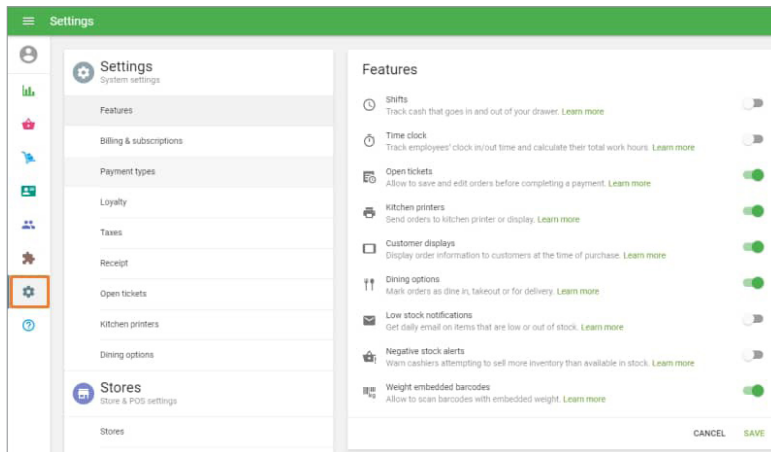
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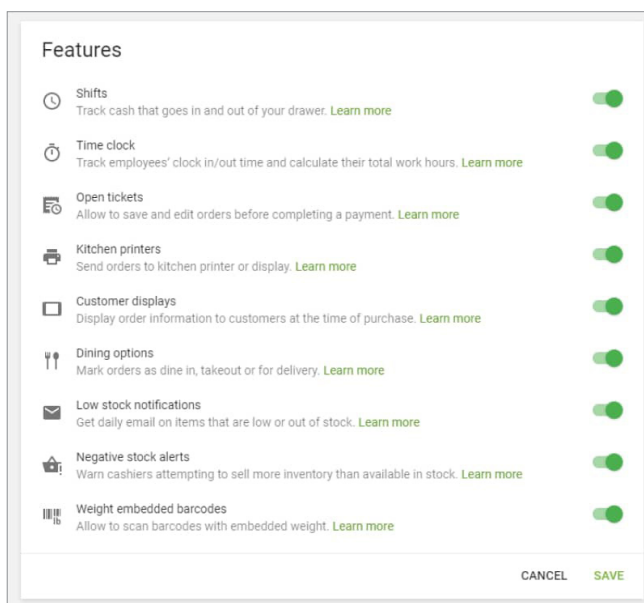
Enter the registered email and password.

3



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

4



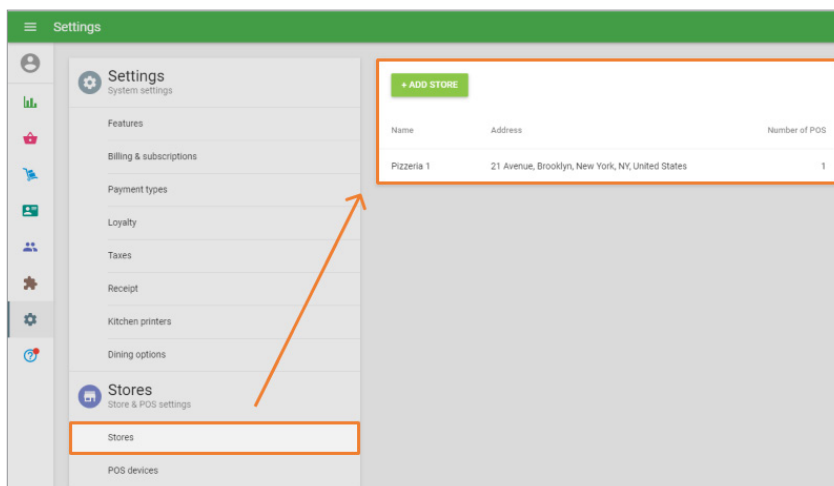
In the 'Features' section, you can switch on parameters such as ['Shifts'](#), ['Time clock'](#), ['Open tickets'](#), ['Kitchen printers'](#), ['Customer displays'](#), ['Dining options'](#), ['Low stock notifications'](#), ['Negative stock alerts'](#), ['Weight embedded barcodes'](#).

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

A green button labeled '+ ADD STORE' is highlighted with an orange border. Below it is a table with three columns: Name, Address, and Number of POS.

Name	Address	Number of POS
Pizzeria 1	21 Avenue, Brooklyn, New York, NY, United States	1

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

The screenshot shows the 'POS devices' section. On the left, a sidebar menu has 'POS devices' highlighted with an orange box. An orange arrow points from this box to the main content area. The main content area has a green header 'POS devices' and a table with a '+ ADD POS' button highlighted in green. The table has two columns: Name and Status.

Name	Status
POS 1	Activated

4

A green button labeled '+ ADD POS' is highlighted with an orange border. Below it is a table with two columns: Name and Status.

Name	Status
POS-1	Activated

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!

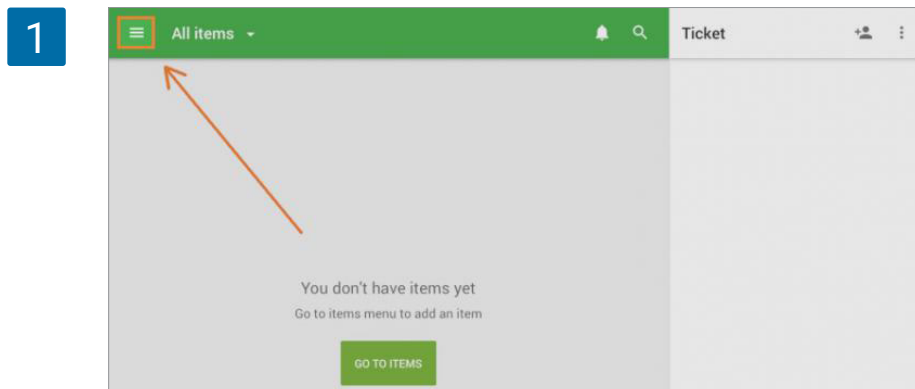


## 1.3 How to Add Items and Categories in Loyverse POS

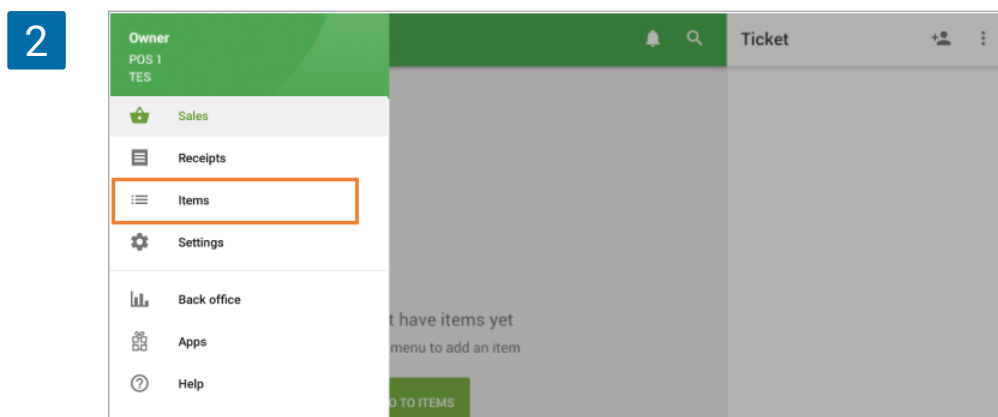
### 1.3.1 Adding items

It's quick and simple to add items and categories in the Loyverse POS right from your smart-phone or tablet.

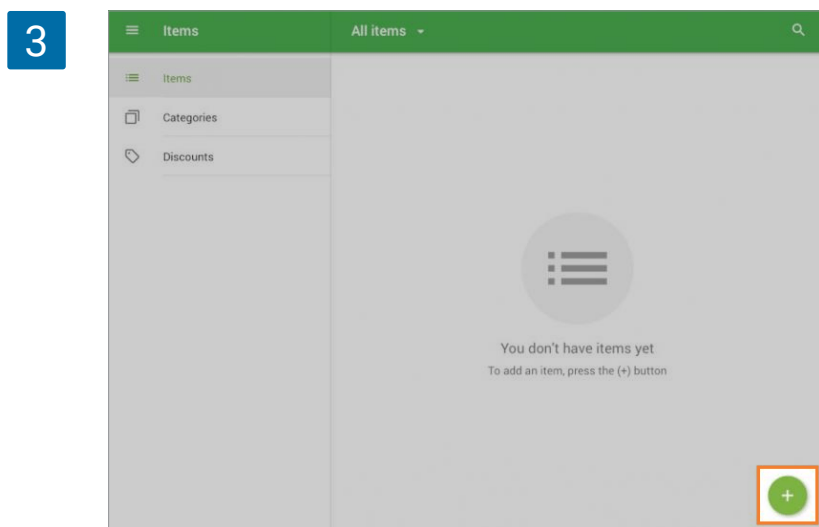
Once you are logged in, press the  (menu) button at the top left corner.



Next, select the 'Items' menu.



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



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

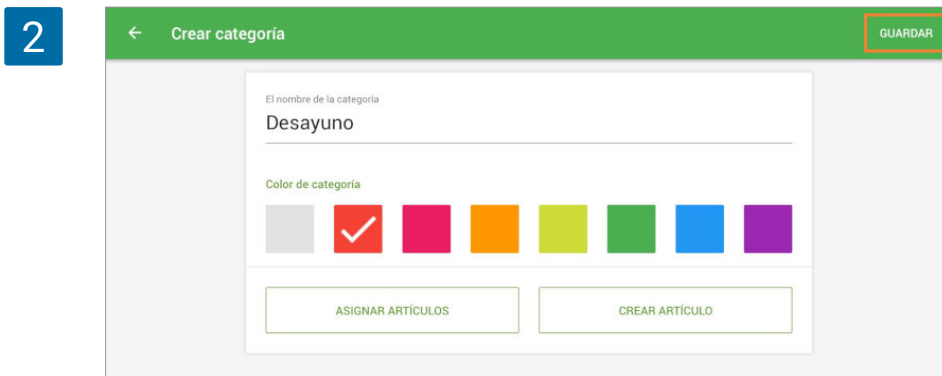
When you sell different types of items, it is easier to categorize your items systematically.

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.



That's it – now you are ready to start selling!

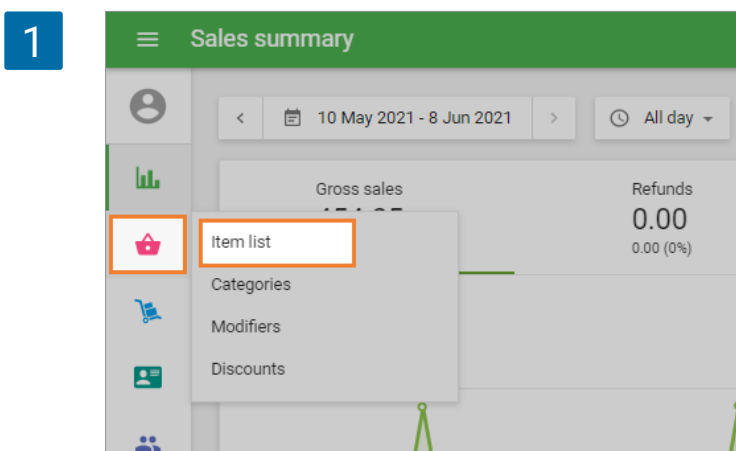
You can excess extended item settings at your Back Office on the web.

## 1.4 How to Add Items in the Loyverse Back Office

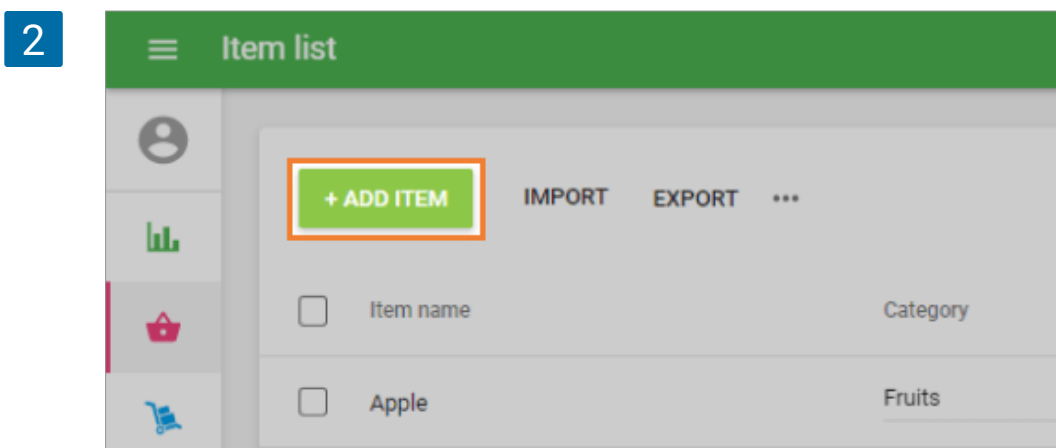
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It's quick and simple to add items on the Loyverse POS on your mobile device. However, if you do this in the Back Office, you can have access to more features for the item.

Go to the 'Item list' menu.

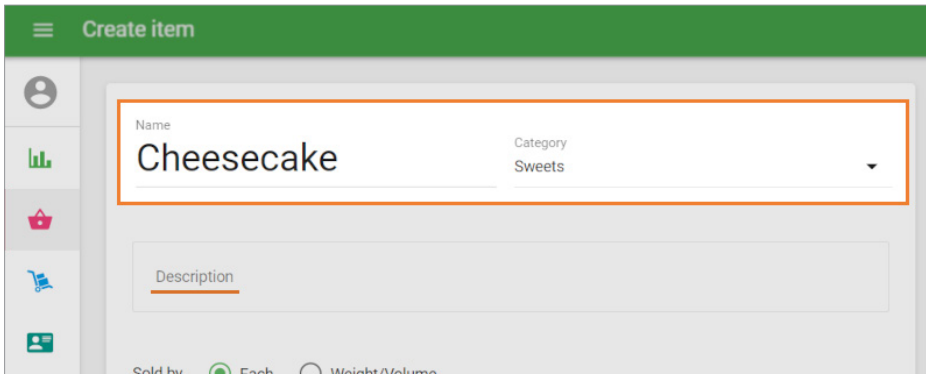


In the Item list, click the 'Add item' button.



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

3



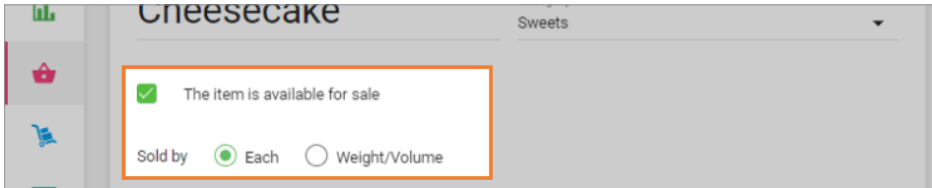
The screenshot shows the 'Create item' form. The 'Name' field contains 'Cheesecake' and the 'Category' dropdown is set to 'Sweets'. The 'Description' field is empty. The 'Sold by' section shows 'Each' selected.

You can also fill in the Description field that is used primarily for e-commerce and online ordering services connected with Loyverse. This field can also be extracted through Loyverse API.

**Note:** There is no such field in Loyverse POS. It is impossible to search for an item in the Loyverse POS app by text from the Description field.

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.

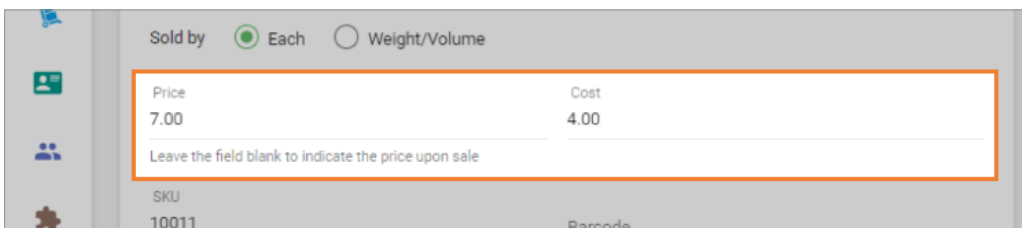
4



The screenshot shows the 'Create item' form with the 'The item is available for sale' checkbox checked. The 'Sold by' section shows 'Each' selected.

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.

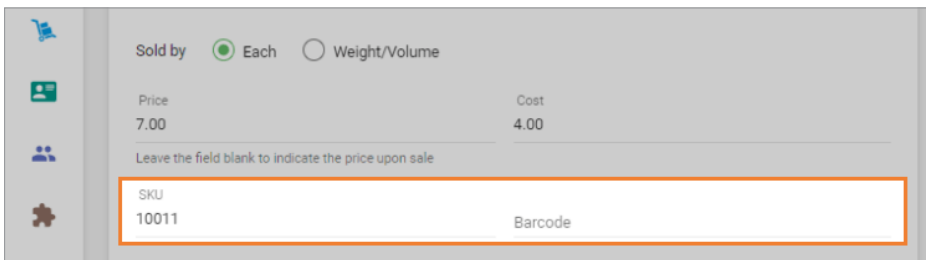
5



The screenshot shows the 'Create item' form with the 'Price' field filled with 7.00 and the 'Cost' field filled with 4.00. The 'SKU' field is filled with 10011.

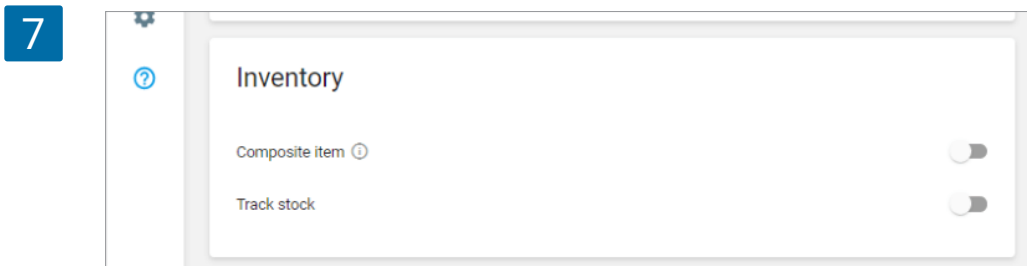
The field SKU (Stock Keeping Unit) is required. It is filled in automatically. However, you can indicate your own SKU. The main requirement is that the number must not be repeated in other items and should not exceed 40 characters. You can use numbers and letters as well. [Fill in Barcode](#), if necessary.

6

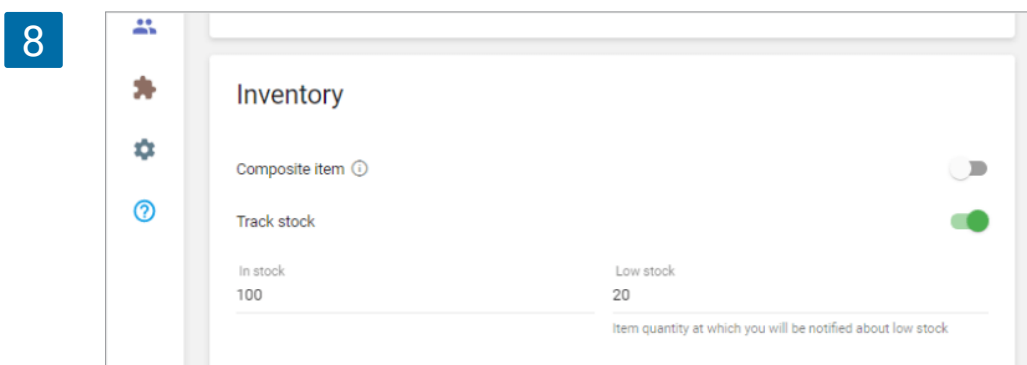


The screenshot shows the 'Create item' form with the 'Barcode' field filled with 10011.

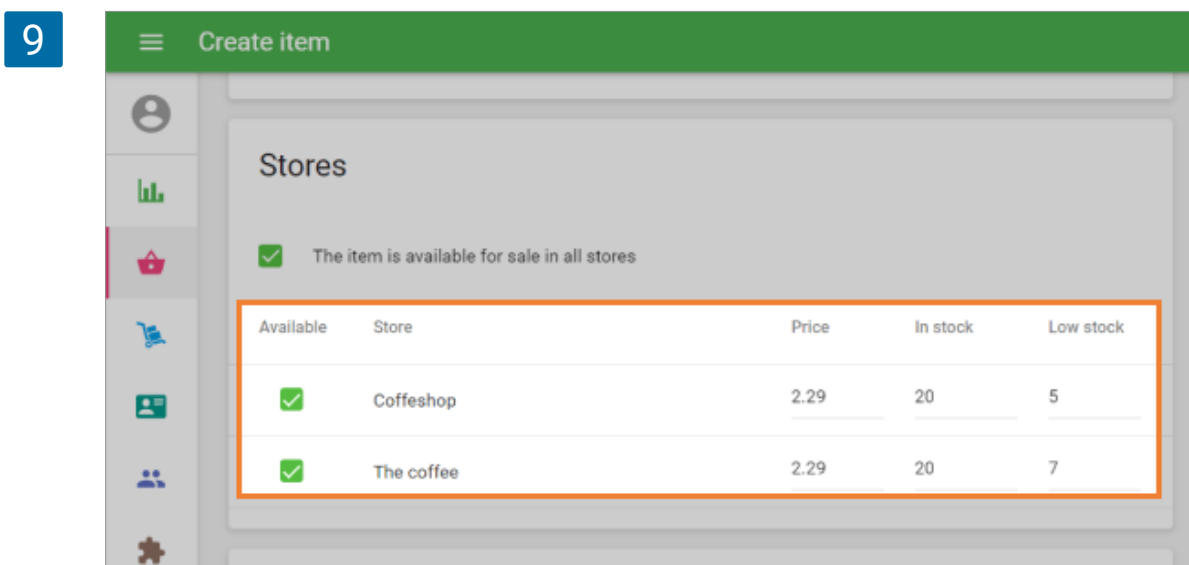
In the inventory section, you can choose the options: '[Composite item](#)' and 'Track stock'.



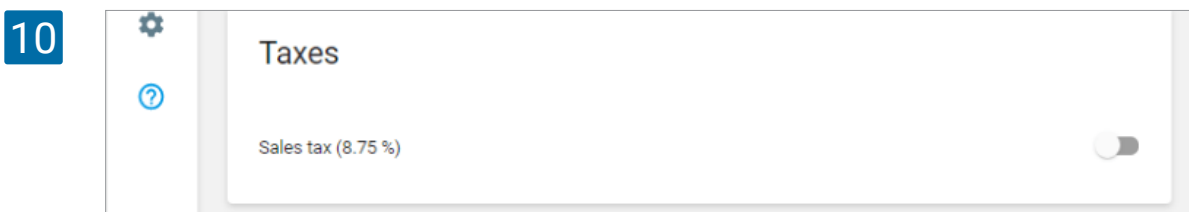
By enabling 'Track stock' you can add the quantity of your stock level and the quantity at which you will receive the [low stock notification](#).



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.

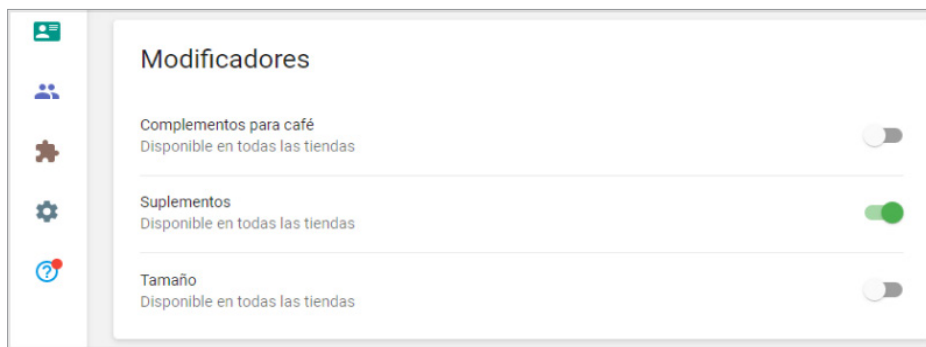


In the 'Tax' section, you can choose the taxes for your item.



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.

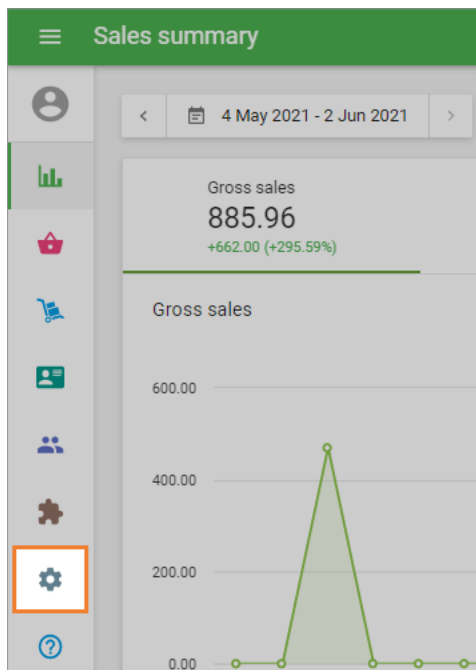
13



## 1.5 How to Configure Taxes in Loyverse

### 1.5.1 How to Configure Taxes in the Back Office

1

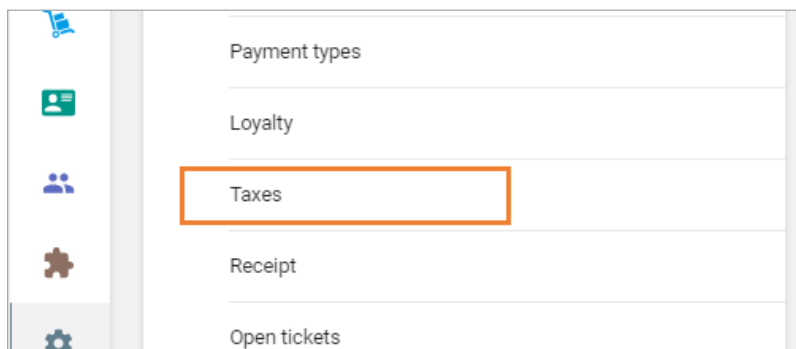


To configure taxes, you need first to sign in to the [Back Office](#).

After signing in, go to Settings.

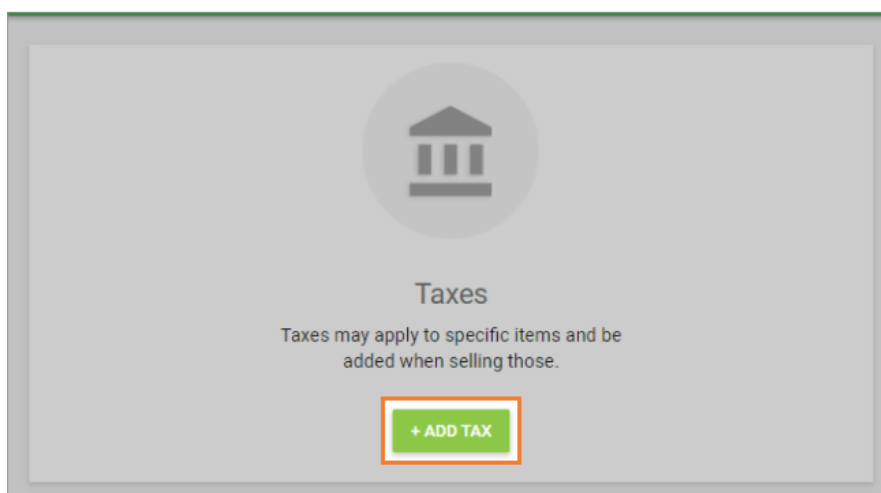
Then go to 'Taxes'.

2



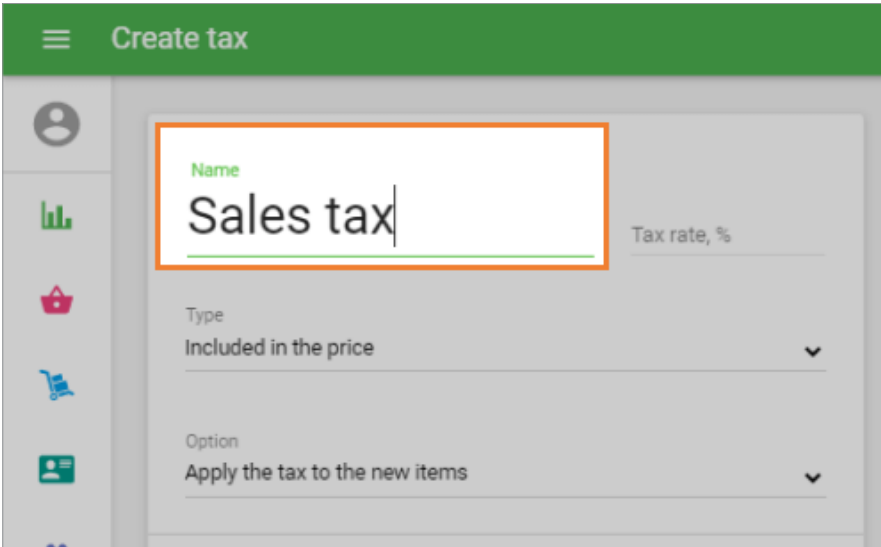
Then press 'ADD TAX'

3



... and name the tax.

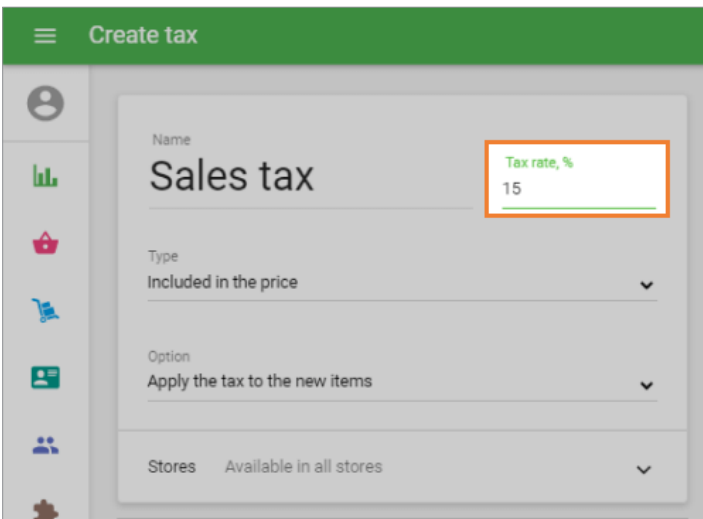
4



The screenshot shows the 'Create tax' form with a green header. The 'Name' field is highlighted with an orange border and contains the text 'Sales tax'. The 'Tax rate, %' field is empty. The 'Type' dropdown is set to 'Included in the price' and the 'Option' dropdown is set to 'Apply the tax to the new items'.

Then input the tax rate

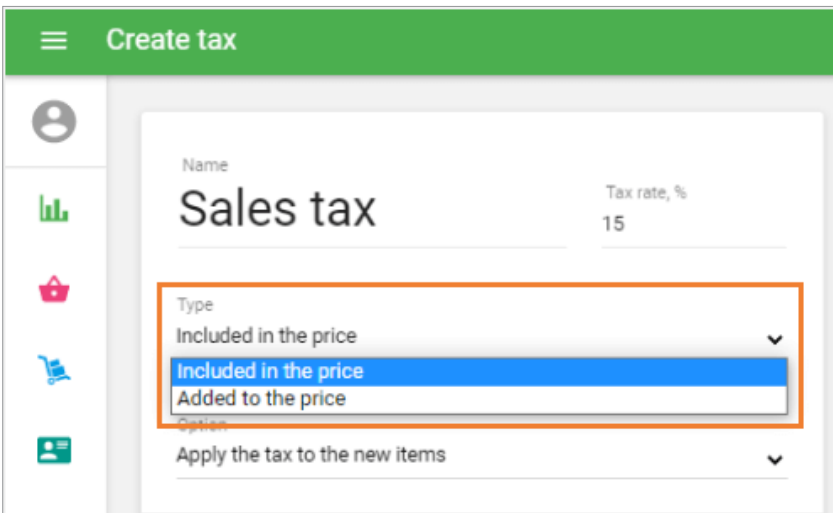
5



The screenshot shows the 'Create tax' form with the 'Name' field containing 'Sales tax' and the 'Tax rate, %' field highlighted with an orange border and containing the value '15'. The 'Type' dropdown is set to 'Included in the price' and the 'Option' dropdown is set to 'Apply the tax to the new items'.

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

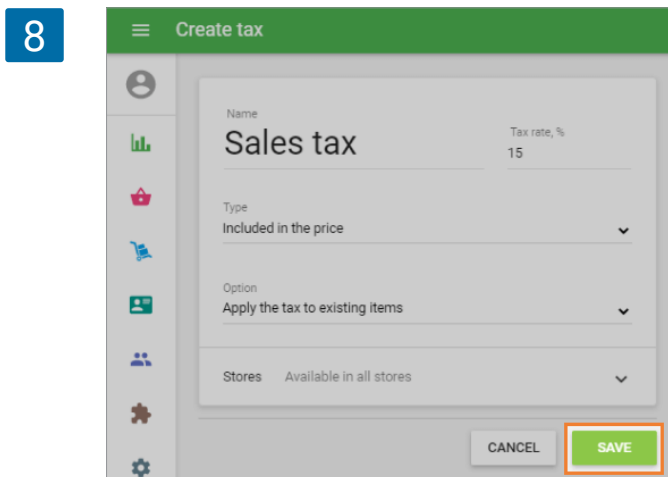
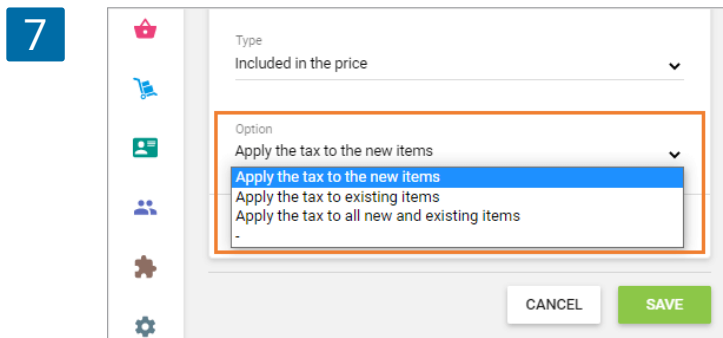
6



The screenshot shows the 'Create tax' form with the 'Name' field containing 'Sales tax' and the 'Tax rate, %' field containing '15'. The 'Type' dropdown menu is open, showing two options: 'Included in the price' (highlighted in blue) and 'Added to the price'. The 'Option' dropdown is set to 'Apply the tax to the new items'.



Select the items to which this tax should apply.



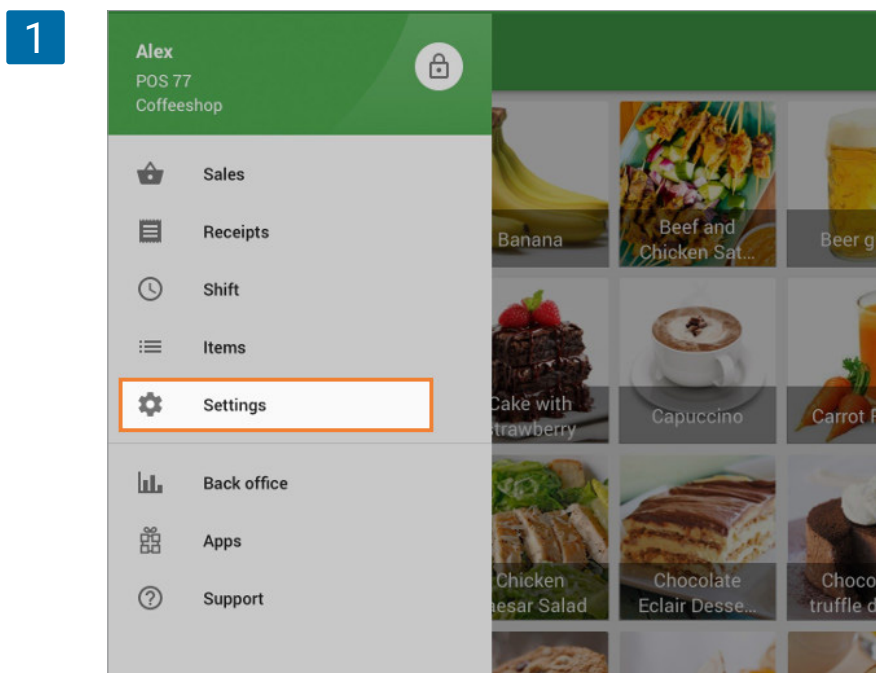
Then press 'Save'.

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

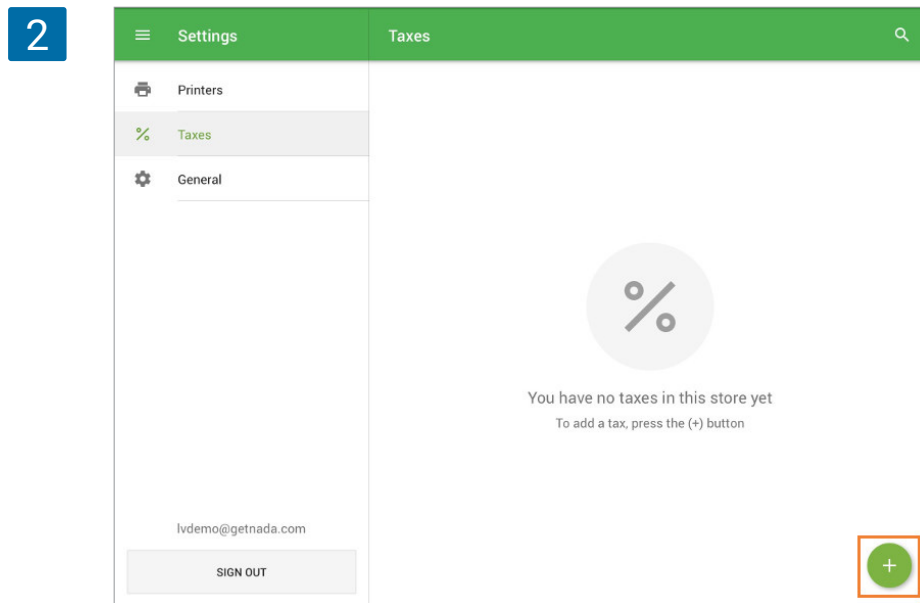
## 1.5.2 How to Set Up Taxes in POS

You can set up and [configure taxes in the Back Office](#).

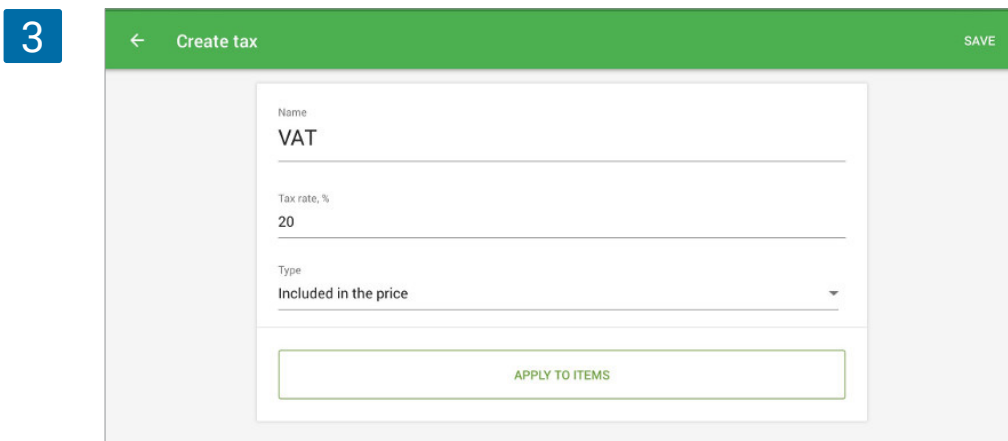
To create taxes in the POS, go to the 'Taxes' section from the 'Settings' menu.



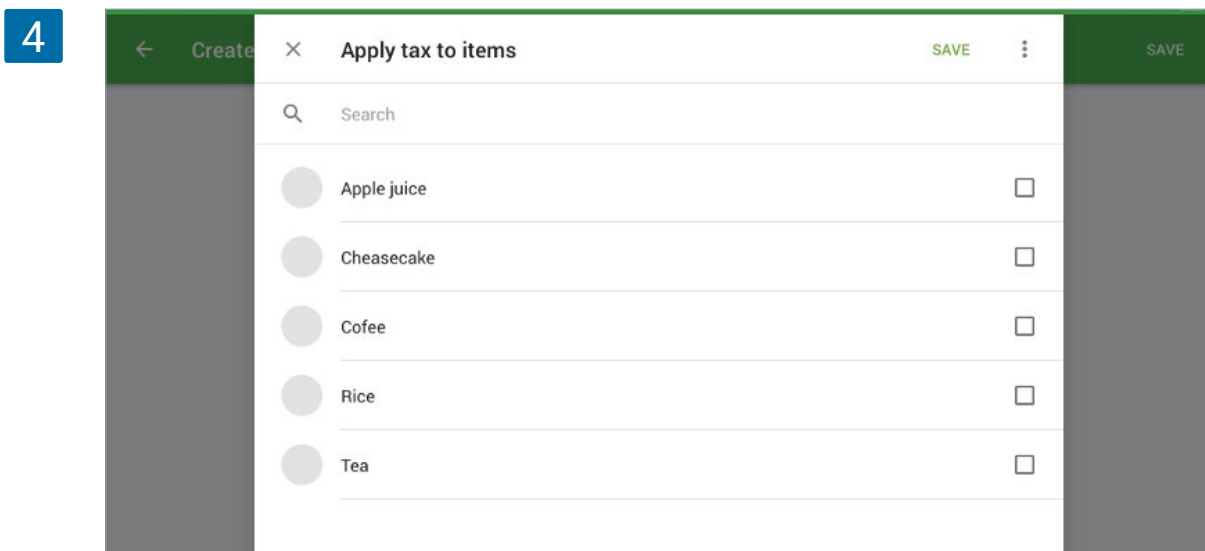
Create a tax by tapping on the '+' button.



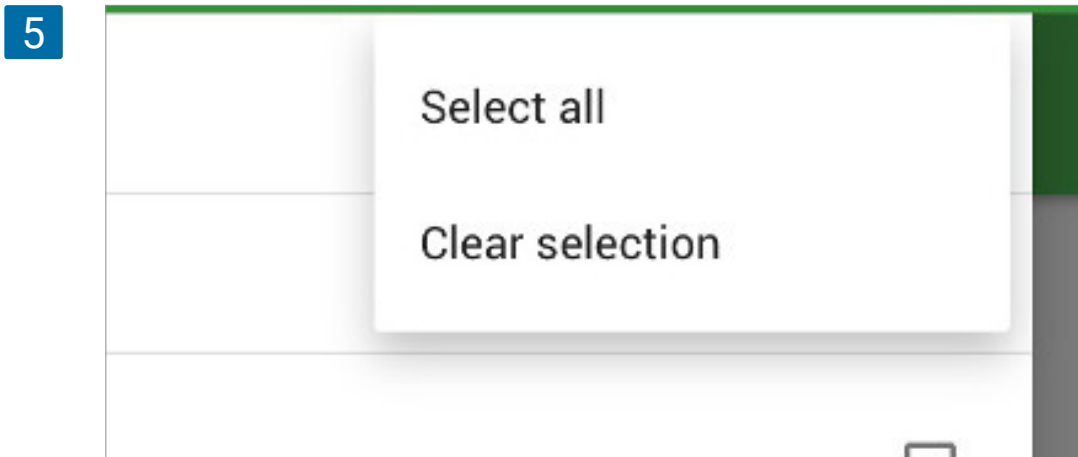
Name the tax, input the tax rate, and specify whether the tax should be 'included in the price' or 'added to the price'. Then tap 'Apply to items'.



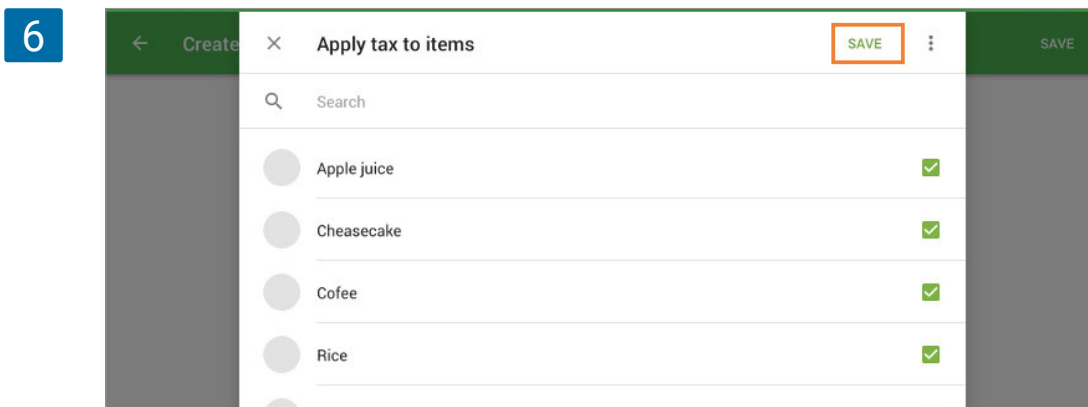
Select items to which this tax will be applied.



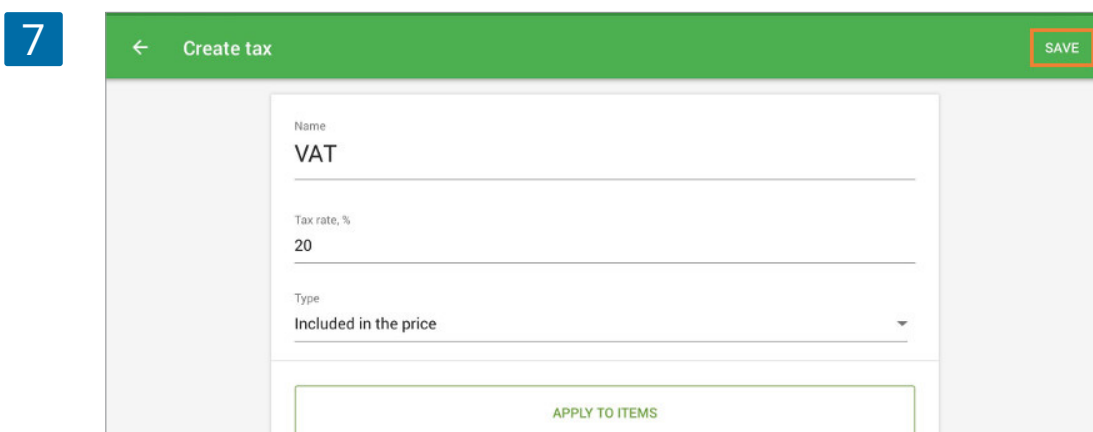
You can 'Select all' items through the three dots menu.



Save your selection.



Then save your tax.



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

#### Note

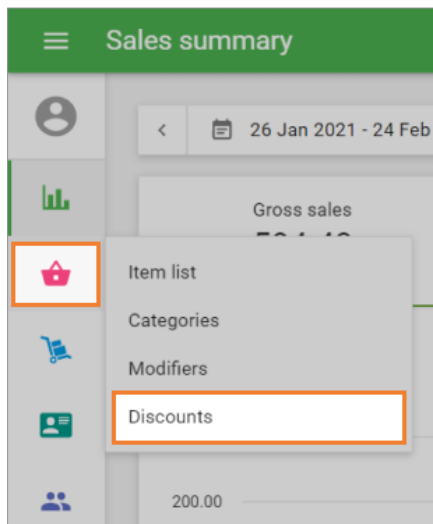
If you have multiple stores, the tax created in the POS will be available only in the store that the current POS belongs to. You can change the availability of this tax in the Back Office.  
If you delete the tax in the POS, it will be deleted from the Back Office as well.

## 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

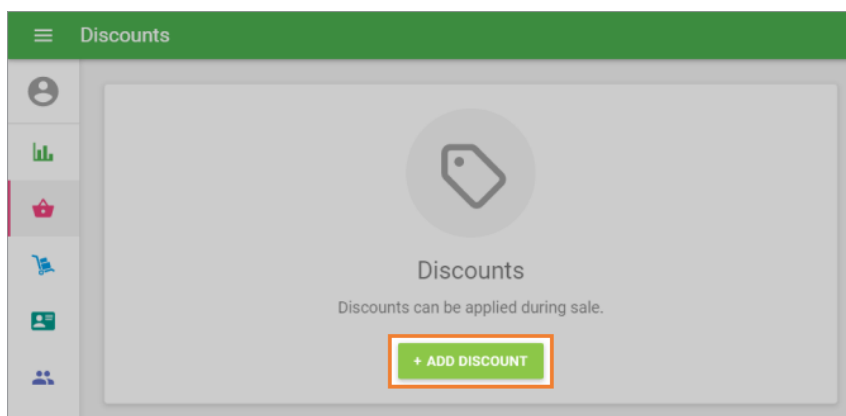
1



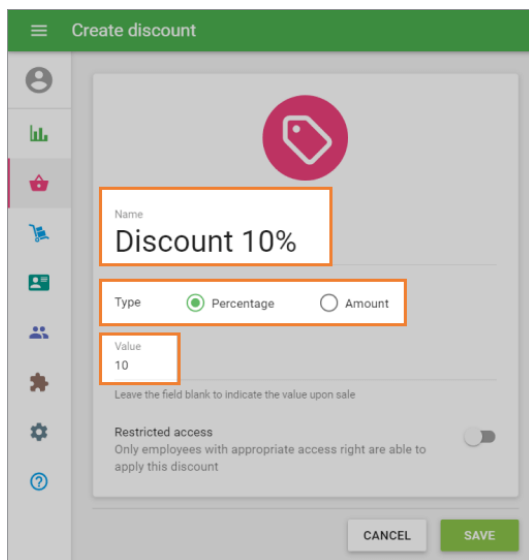
Log in to the Back Office. In the 'Items' menu section, select 'Discounts'.

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.

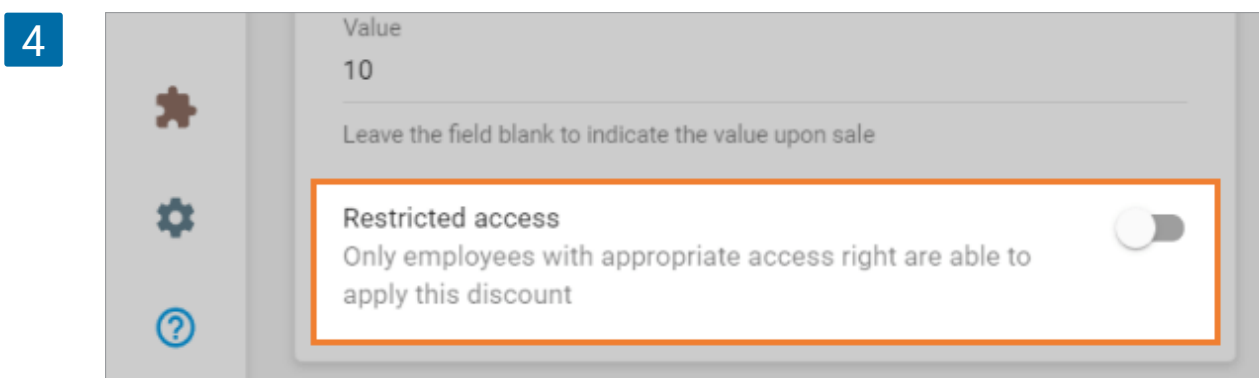
Fill in the 'Value' field.

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.

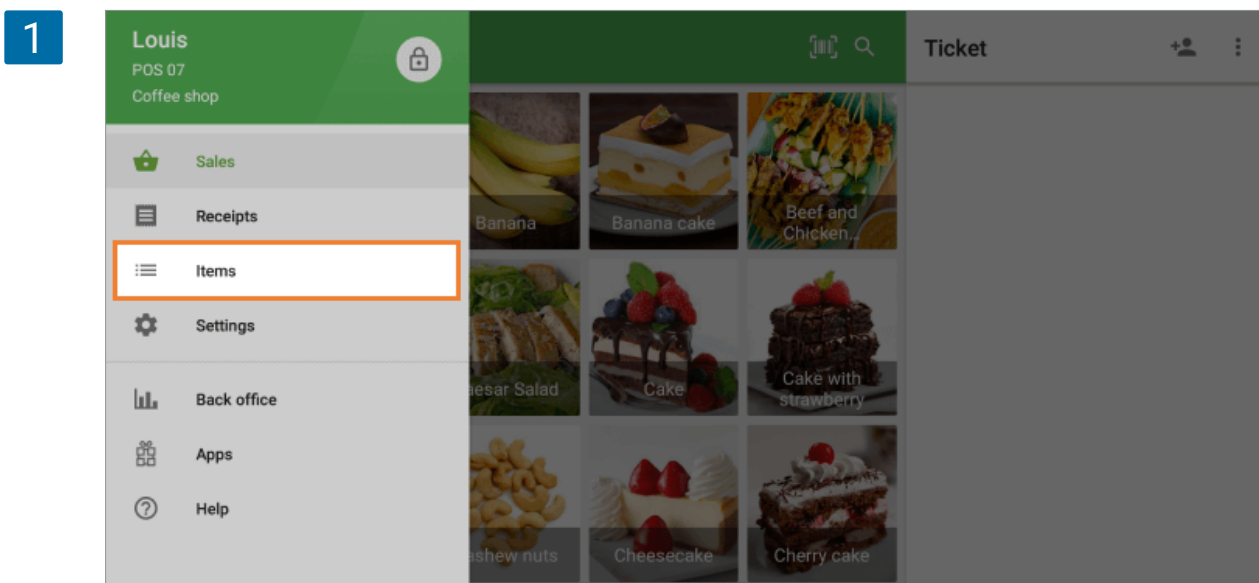
If the 'Restricted access' option is activated, then only the employees with the access right will be able to apply this discount.



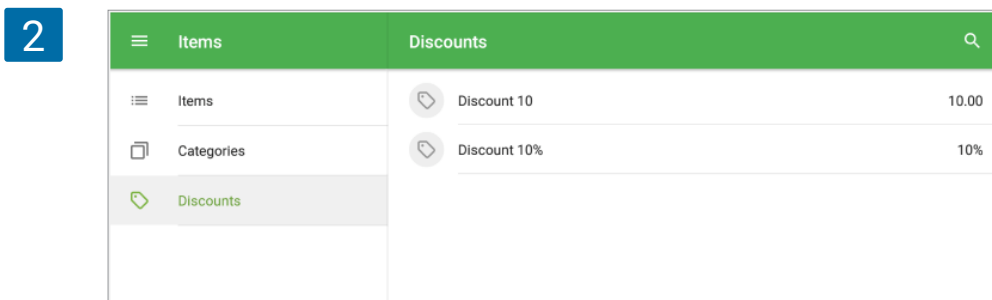
Don't forget to save your changes.

## 1.6.2 Discount set up in the mobile application

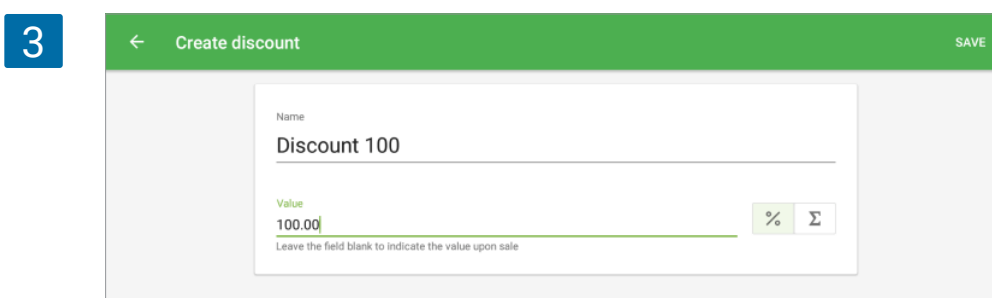
To create, view, edit or remove a discount, select the section 'Items' in the App's menu.



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.



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

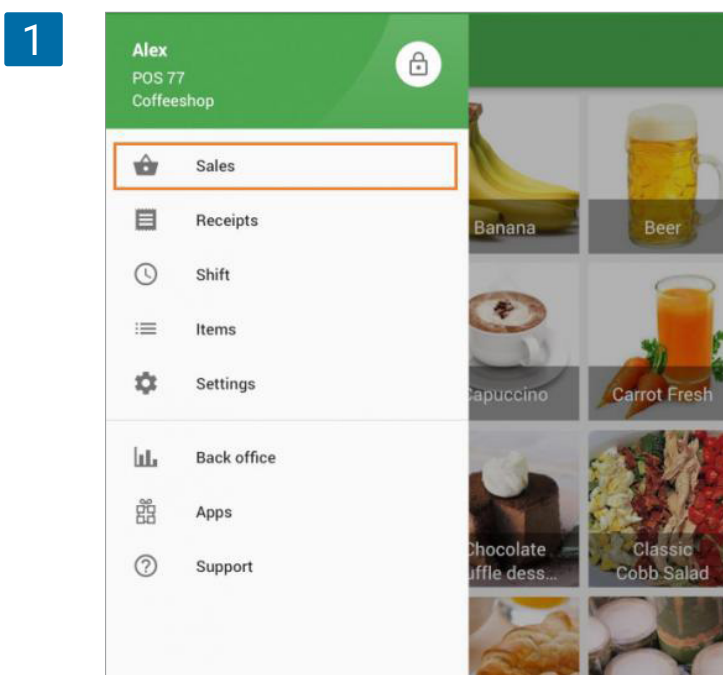


Don't forget to save changes.

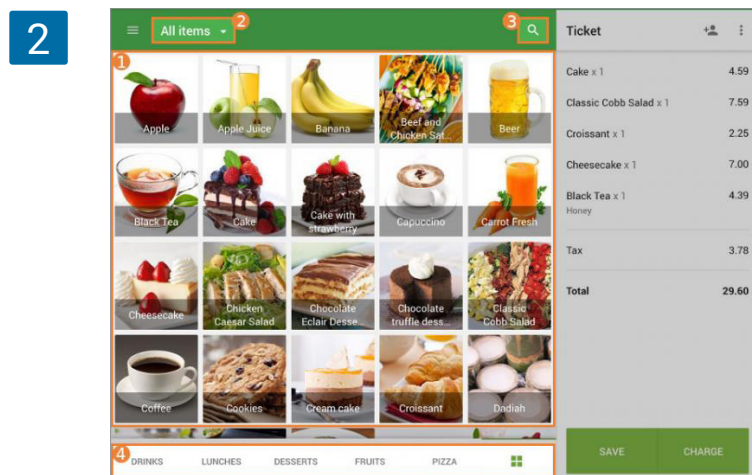
Then, after you have created the discounts, you can apply them during the sale.

## 1.7 How to Make Sales

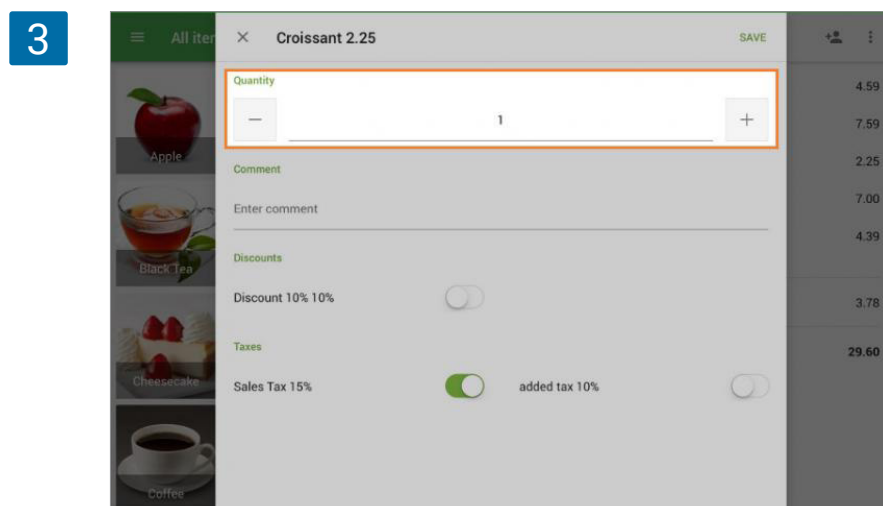
Launch your Loyverse POS app ([Play Market](#) or [App Store](#)) and go to the 'Sales' screen.



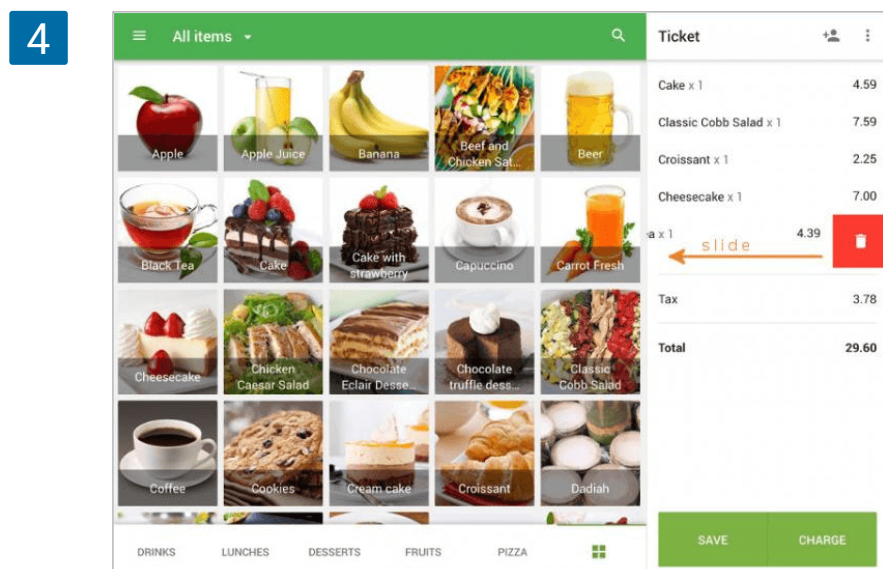
1. Tap on the item's image or icon on the sales screen to add the item to the ticket.
  2. You can sort items by categories with the drop-down list 'All items'.
  3. You can also use the search bar to look up items.
  4. It is easy to find items by pages at the bottom of the screen.
- See [How to Arrange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



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

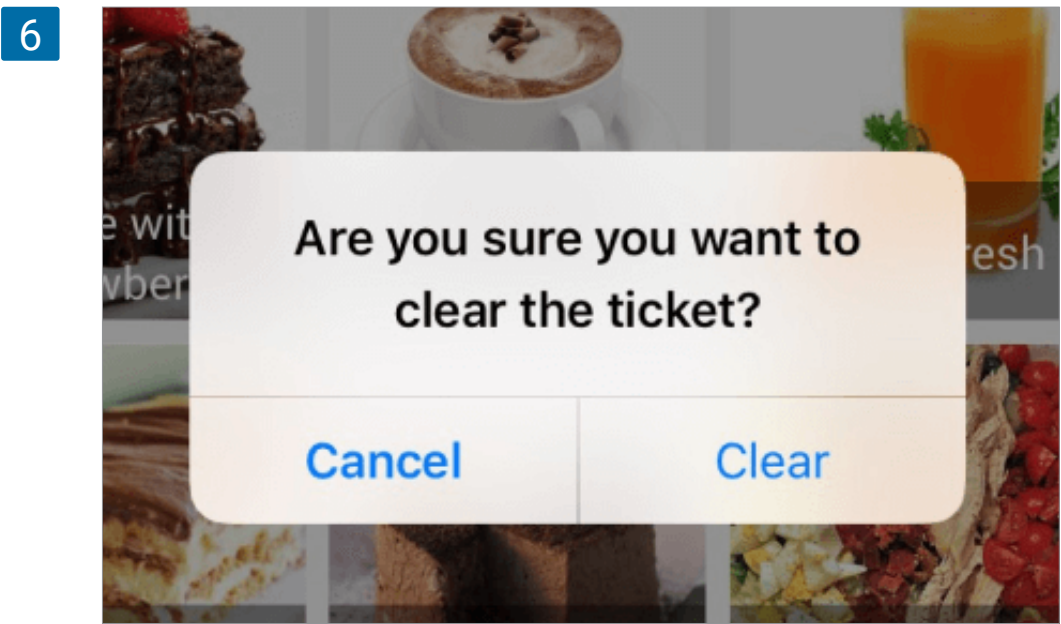
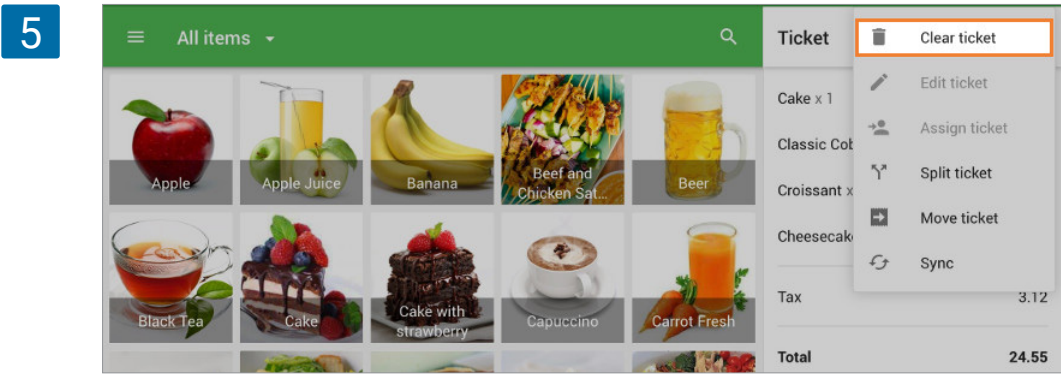


By sliding any selected item to the left, you can remove the item from the ticket.

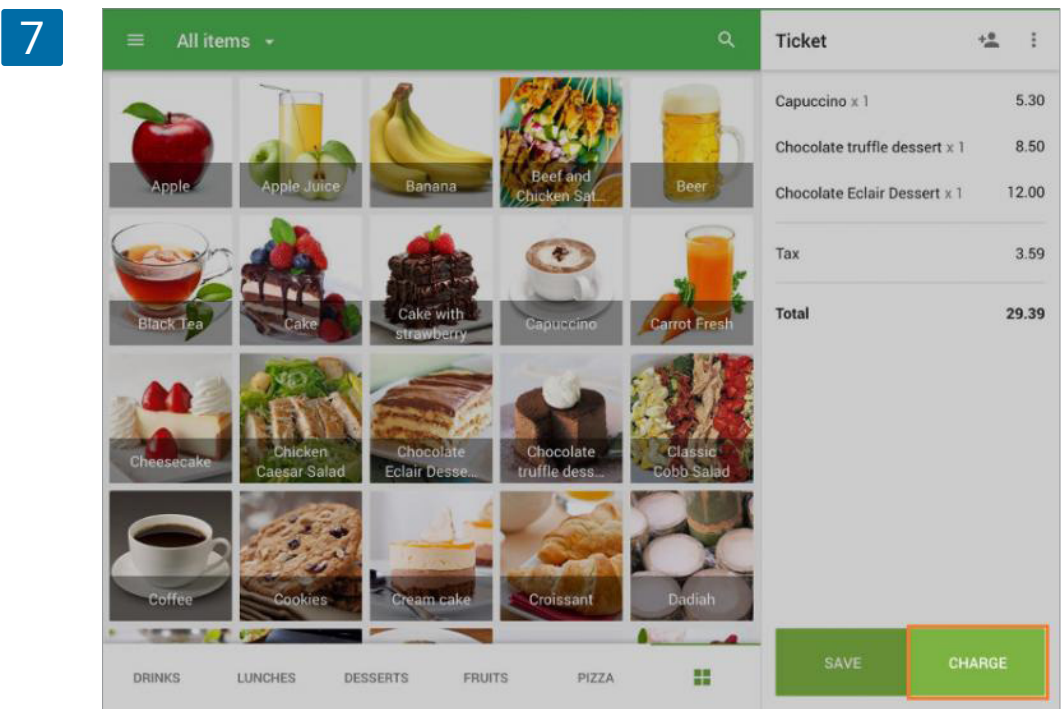




When you need to void a sale, tap the three dots menu (⋮) at the ticket header, then tap 'Clear ticket'.

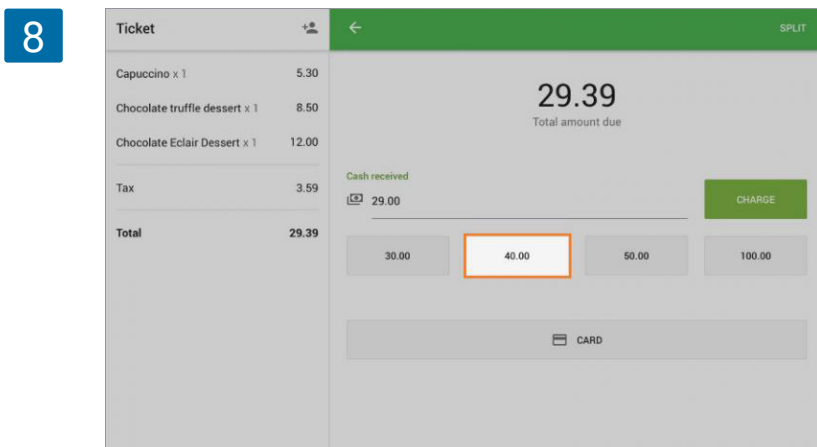


Tap the 'Charge' button in the bottom right-hand corner to proceed to the sale registration.

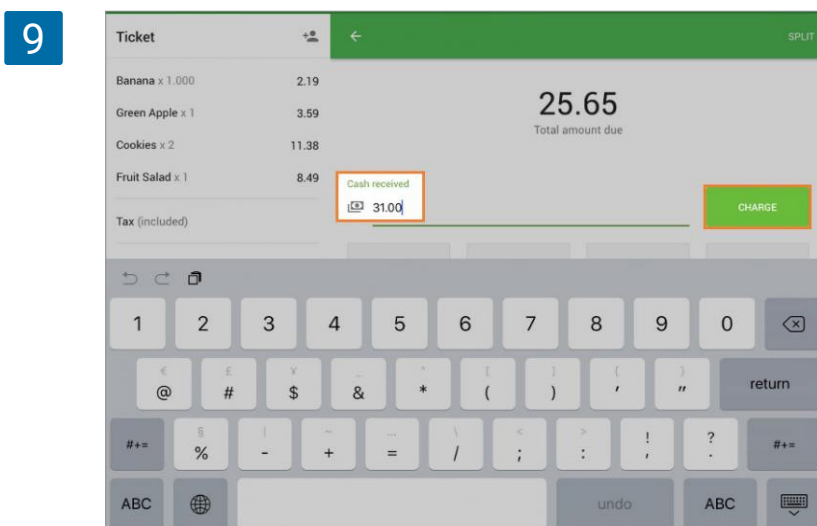




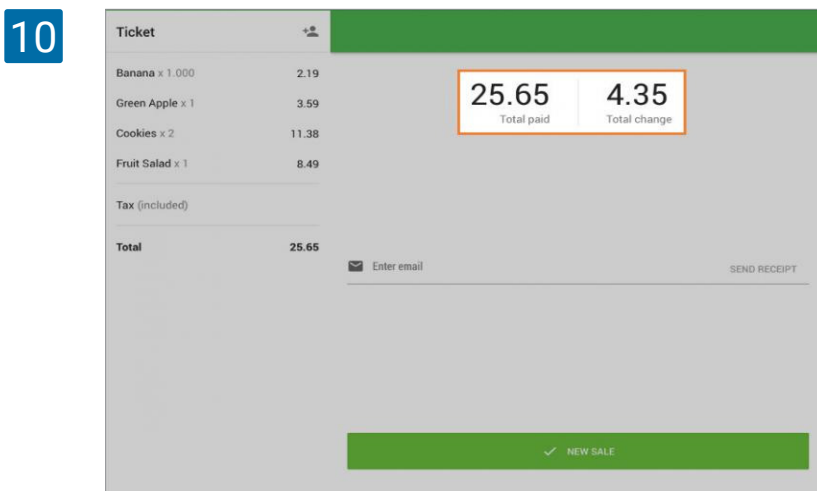
At the following dialog window, you can choose a type of payment for the purchase. If it is a cash payment, you can tap on the suggested amount.



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'.



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



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



# 2. Sales



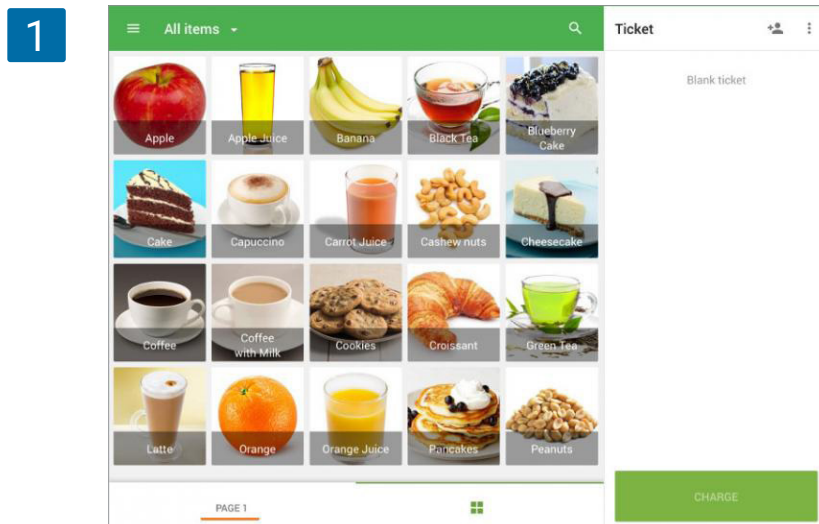
## 2.1 How to Arrange Sale Screen in Loyverse POS

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.

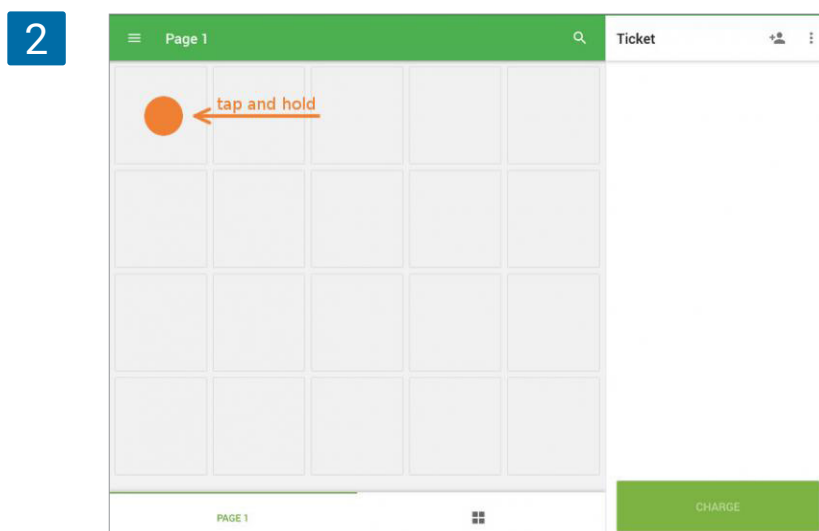
As a default, there is a page (marked by the grid icon) with all your items in an alphabetical order. You cannot change this page. However, you can organize the items on the custom pages.

### 2.1.1 Organizing of Items

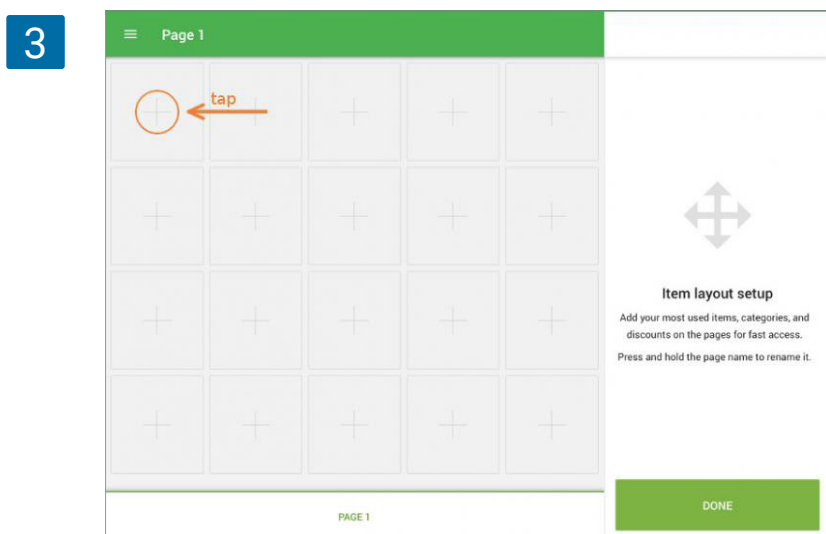
Open the sales screen on your POS. Go to the custom page 'Page 1'.



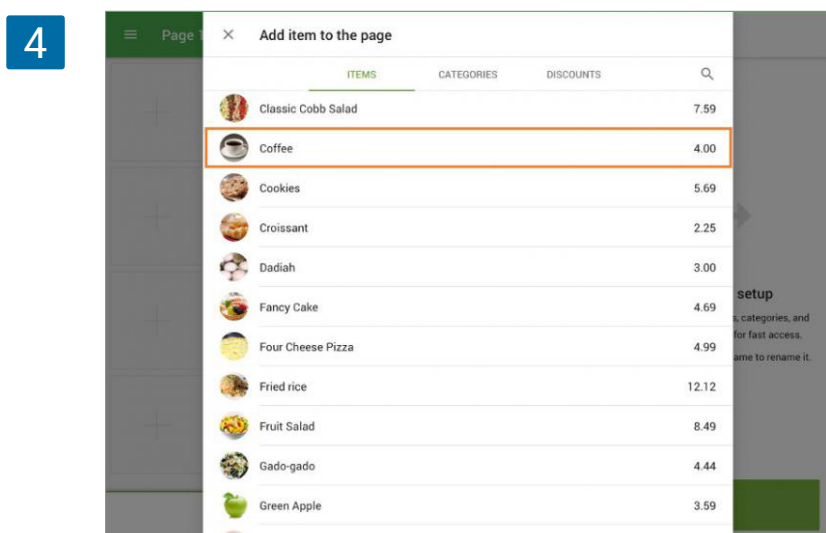
You will see a grid with empty squares. Tap and hold any square for a few seconds.



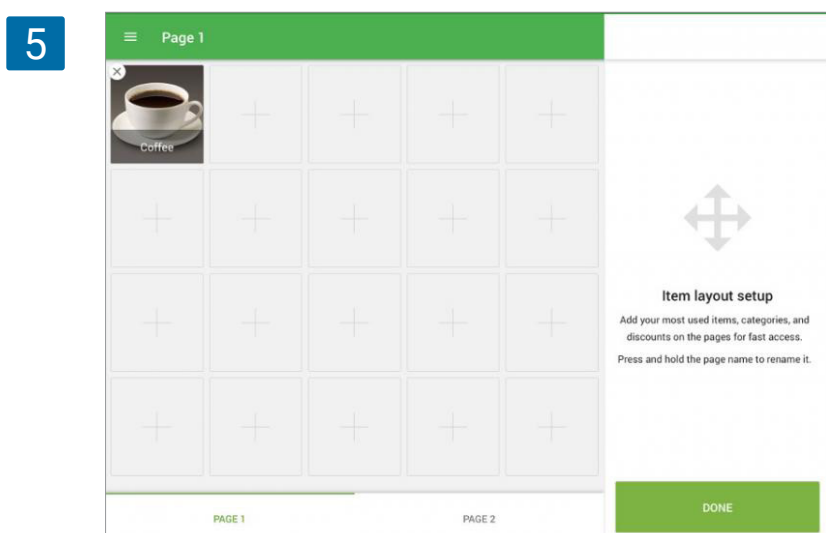
The screen will switch to the 'Item layout setup' mode. Tap any square containing the + sign.



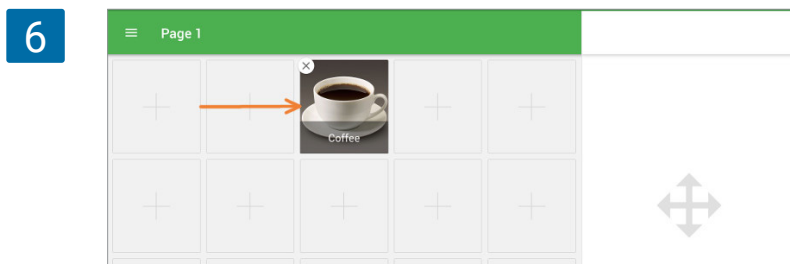
The item list will open in a new screen.



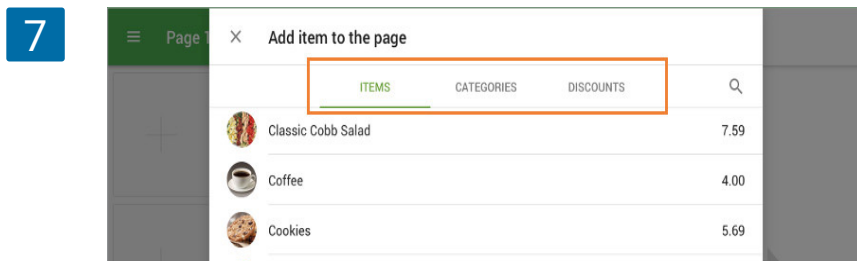
When you choose an item, it will fill the square.



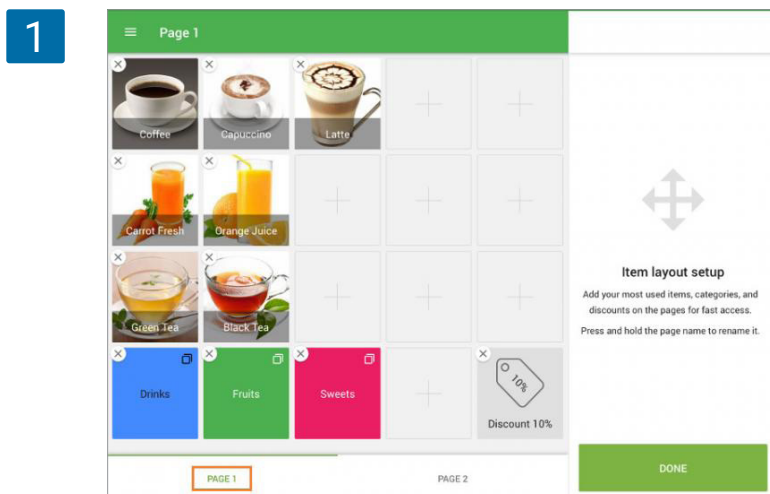
By dragging and dropping the item icon, you can move it to another square.



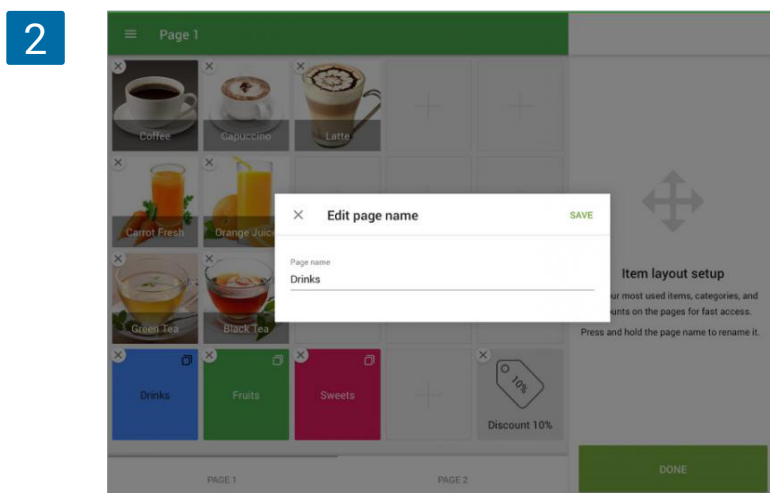
In the same way, you can add Categories and Discounts to the grid page.



## 2.1.2 Organizing Pages

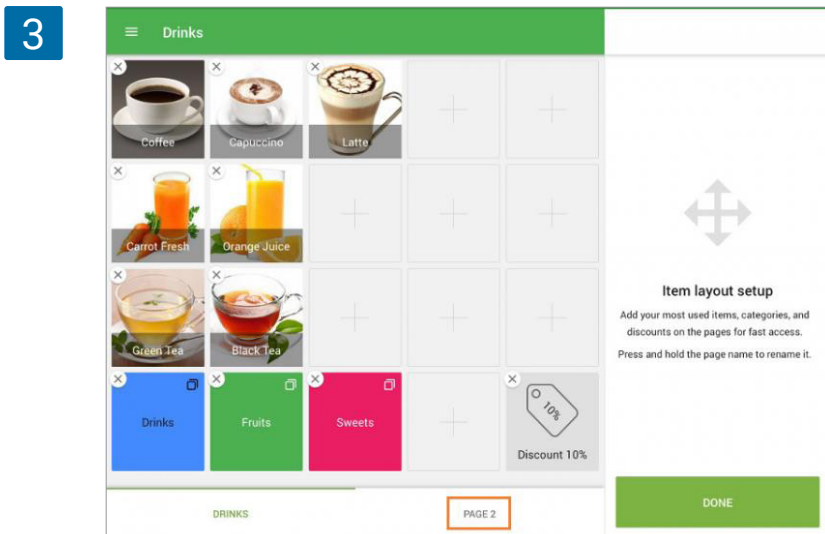


When you are in the setup mode, you can change the name of the page. Just tap and hold the page label for a few seconds.

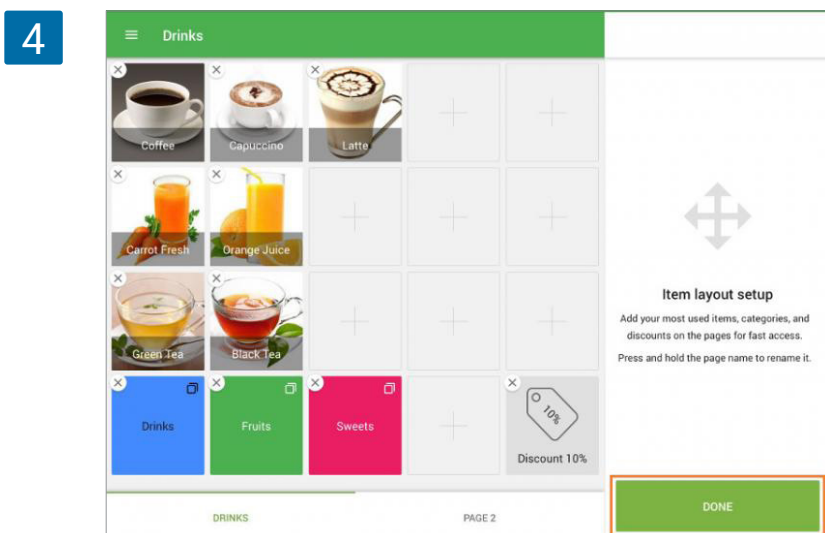


The editing screen will open. Fill in the 'Page name' field and tap 'Save'.

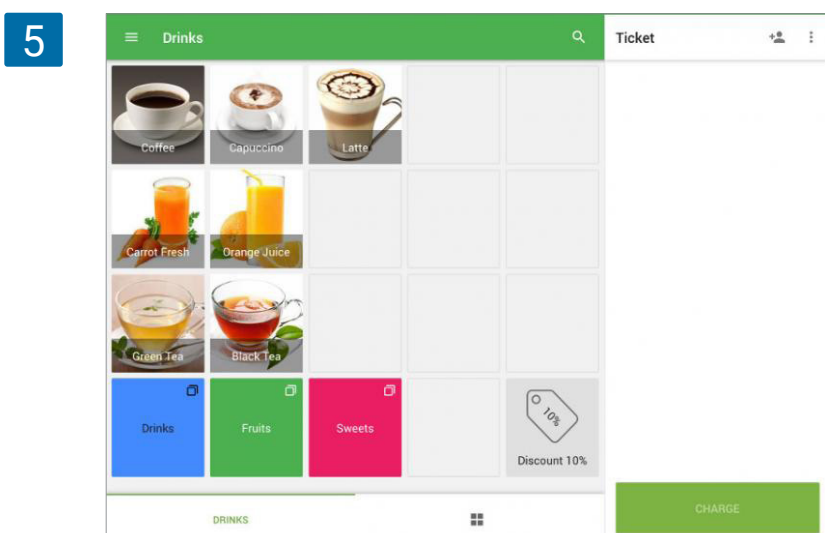
If you want to create another page, you can do it in the same way by tapping the next free page.



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



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

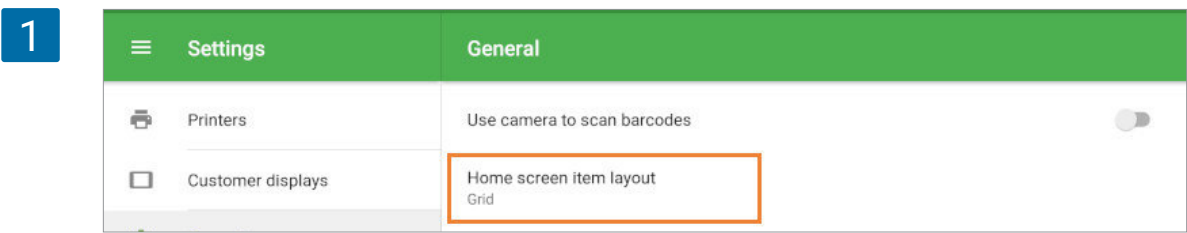


# 2.2 How to Change Home Sale Screen Layout

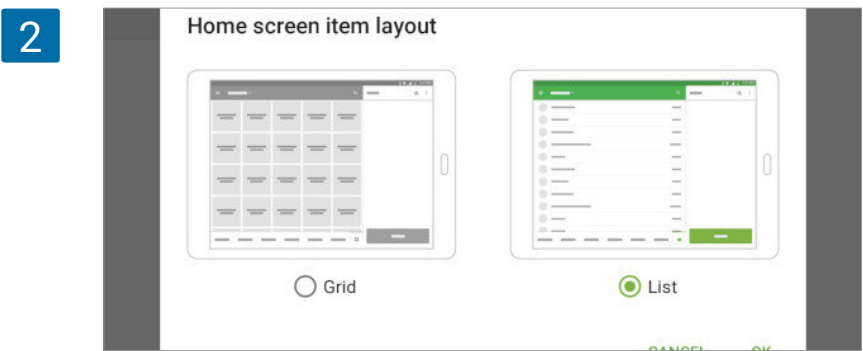
You can set your home sale screen layout either in a grid or list format. The feature allows you to find the desired items more conveniently and add them to the receipt.

## 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’.



Choose the list option and save changes.



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.

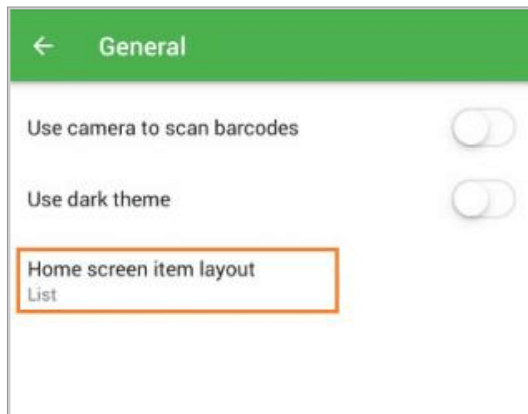


**Note**

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

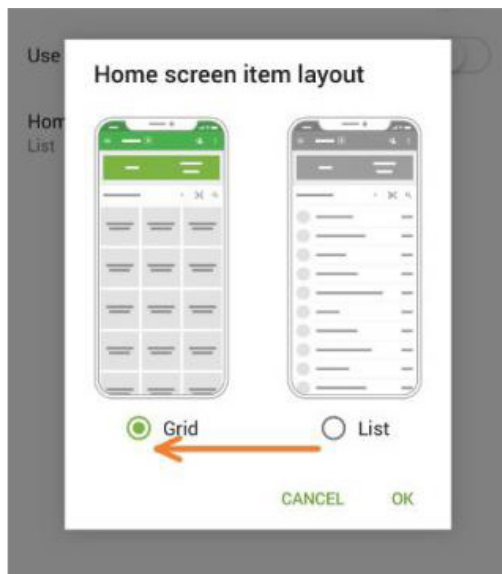
1



By default, the home sale screen on smartphones is set to the list layout.

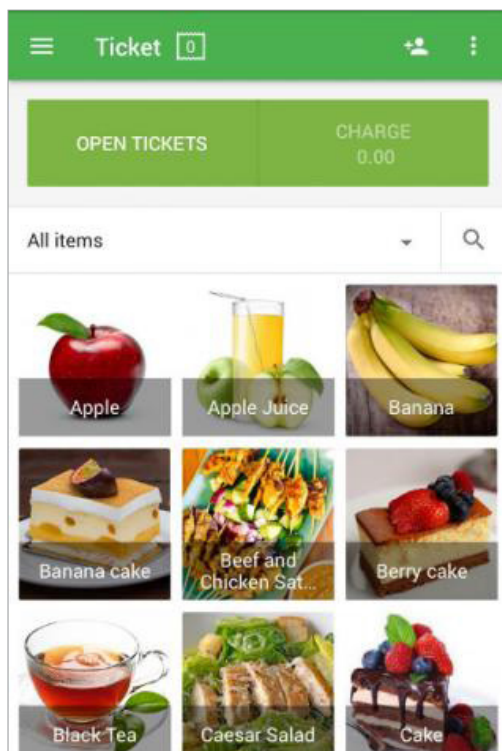
To set your smartphone to the grid layout, go to 'General' under the application settings, and tap 'Home screen item layout'

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.

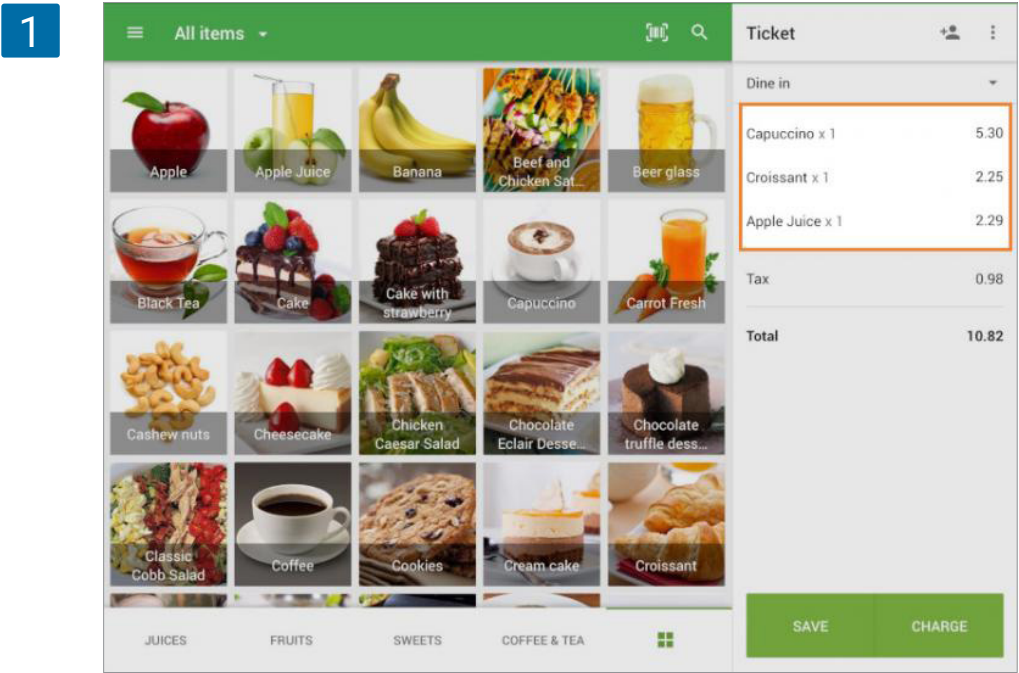


# 2.3 How to Apply Discounts During a Sale

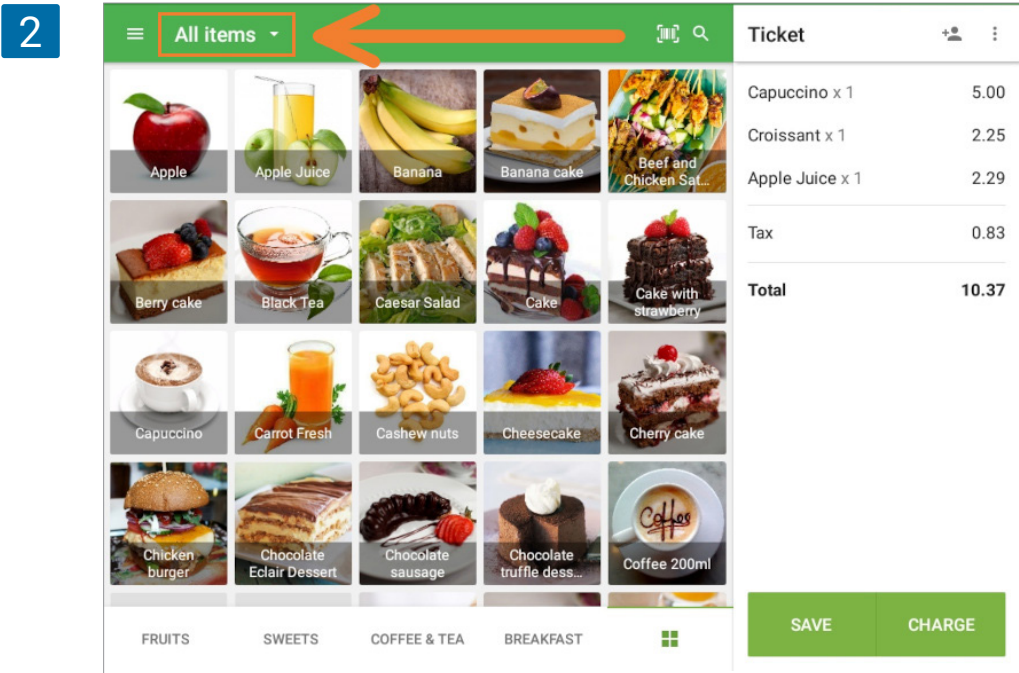
Before starting to use discounts during a sale, [create and configure](#) them in the [Back Office](#) or the mobile app ([Play Market](#) or [App Store](#)).

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

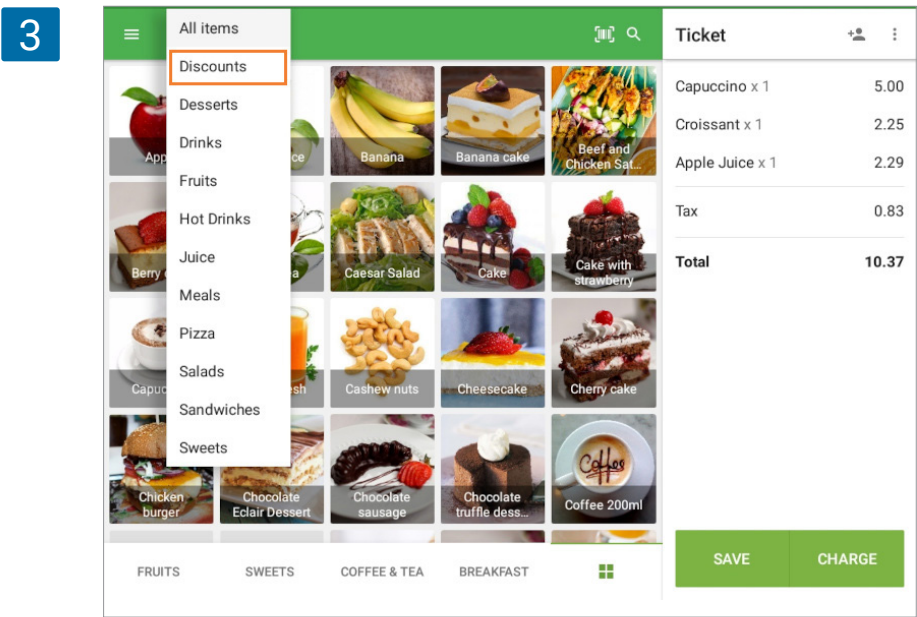
If you want to apply a discount to the whole ticket, first create the ticket by choosing items from the sale screen.



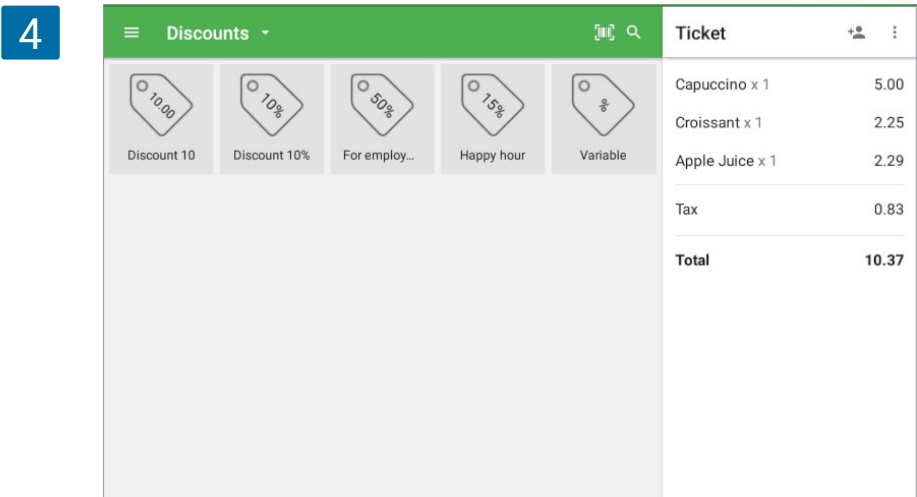
To apply a discount to the ticket, please click on the 'All items' line on the top left side of the sale screen.



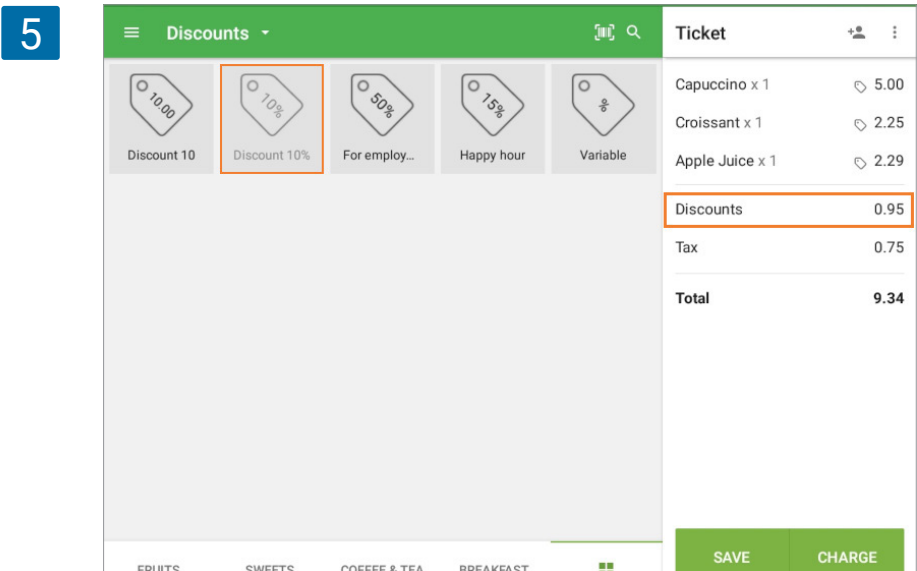
In the drop-down menu, click on the 'Discounts'.



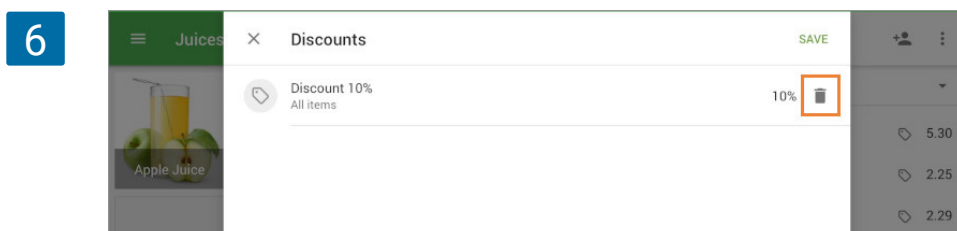
You will see the list of your previously created discounts



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

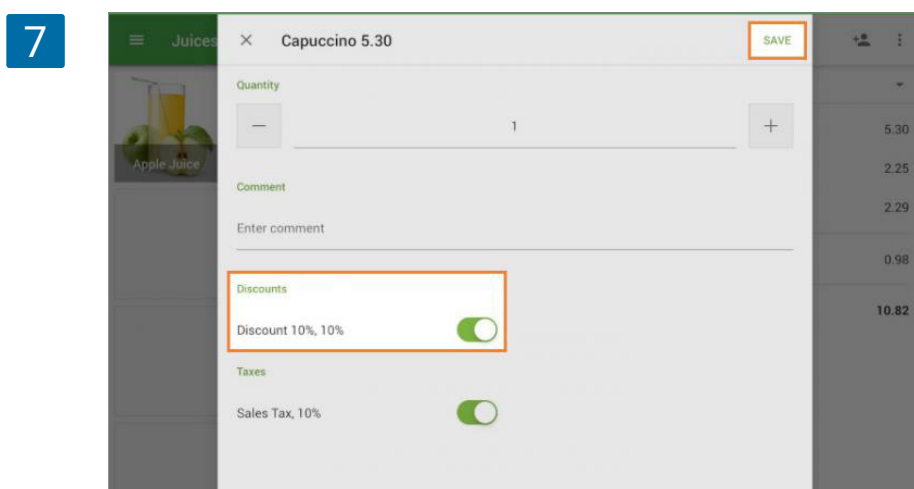


If you want to cancel it, tap the “Discount” line on the ticket. In the opened window, tap the trash icon.

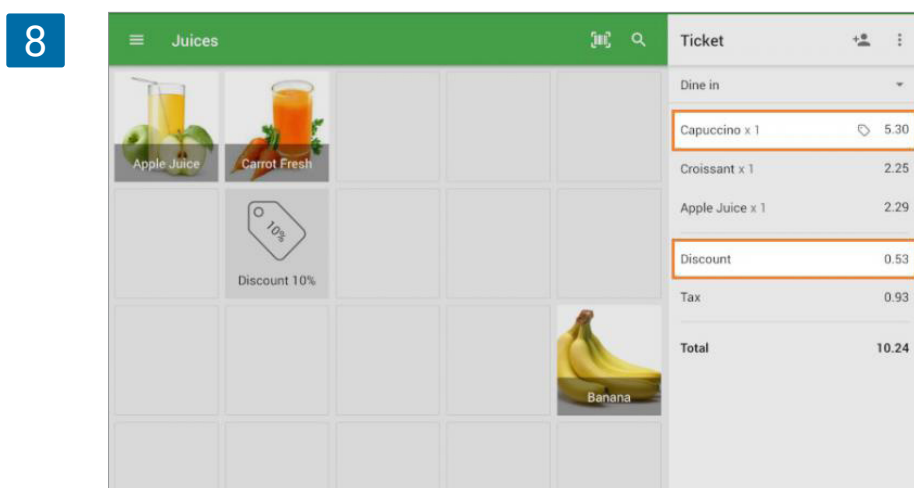


In order to apply a discount to a specific item, tap the item in the current ticket.

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.



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



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

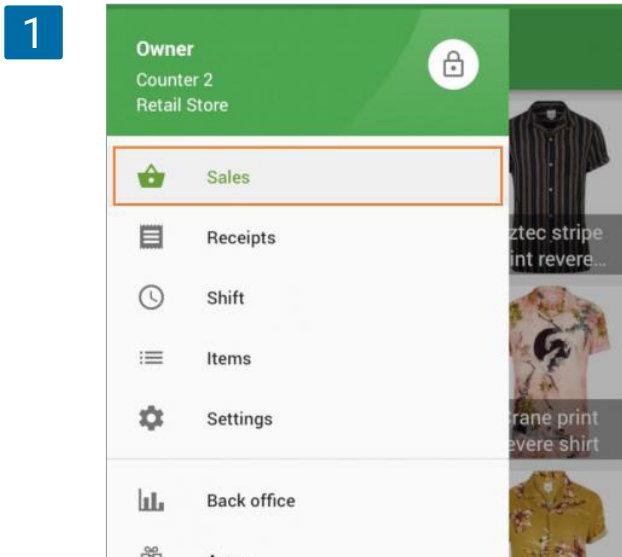
### Note

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.

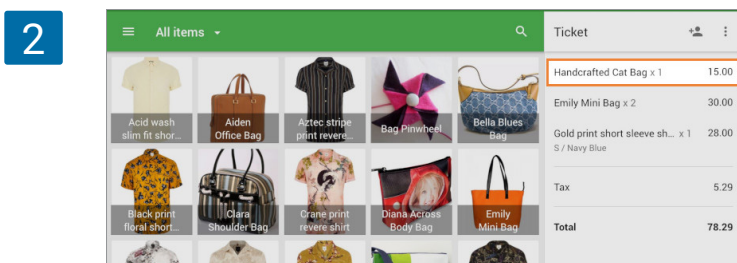
## 2.4 How to Sell Items Using Barcode Scanners

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](#).

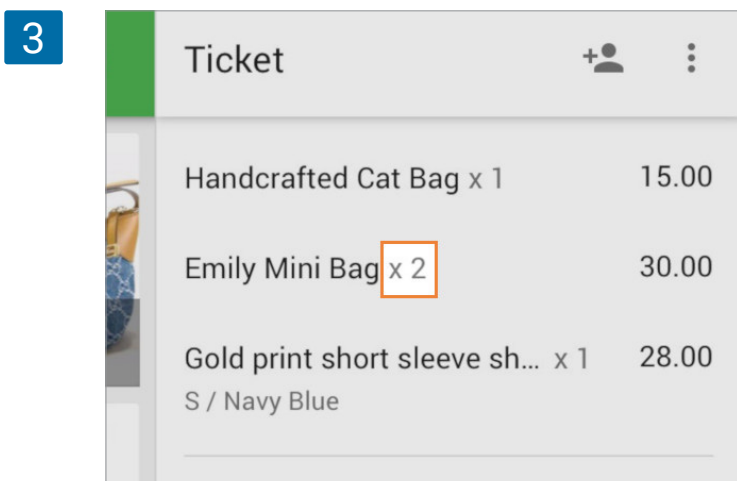
Launch your Loyverse POS app (Android, iOS) and go to the Sales screen, in the same way as when [selling without a scanner](#).



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



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

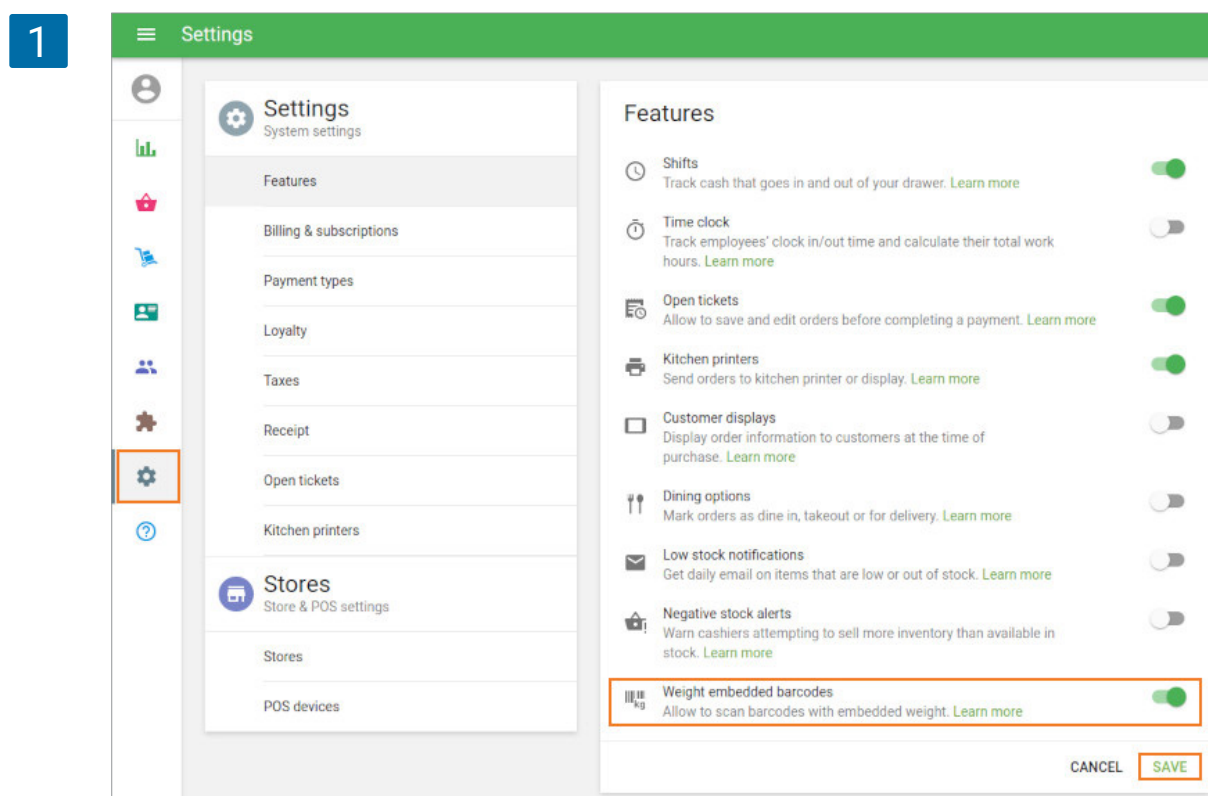


## 2.5 How to Scan Barcodes with Embedded Weight

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.



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:

**YYCCCCCWWWWX**

**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

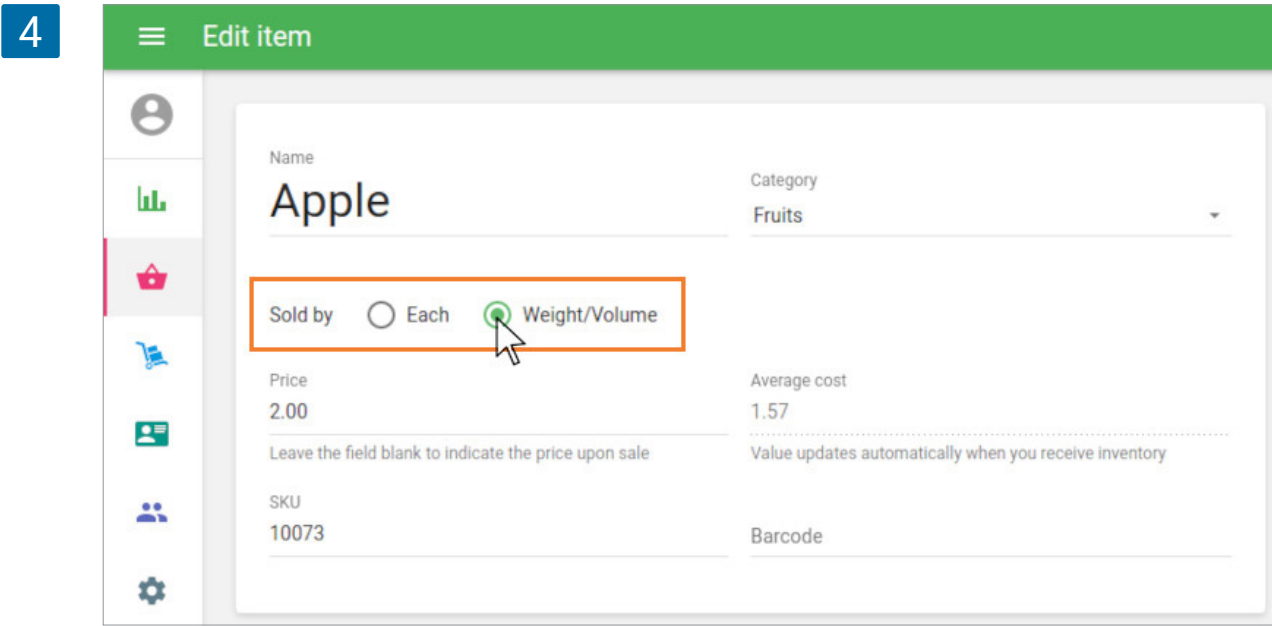


UPC-A



Note

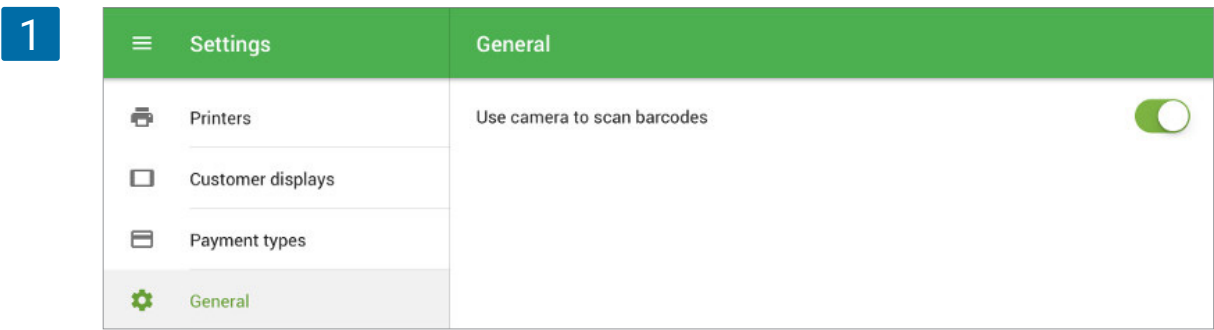
Items should have the ['sold by weight' option](#) on. Otherwise, you will receive an error message when scanning barcodes with embedded weight.





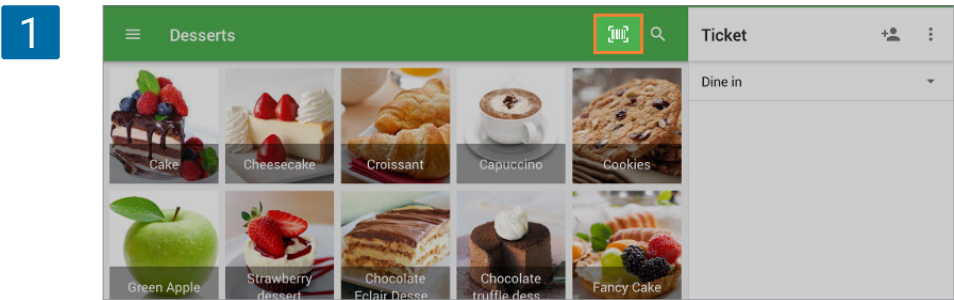
# 2.6 Barcodes Scanning by Built-in Device Camera

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.

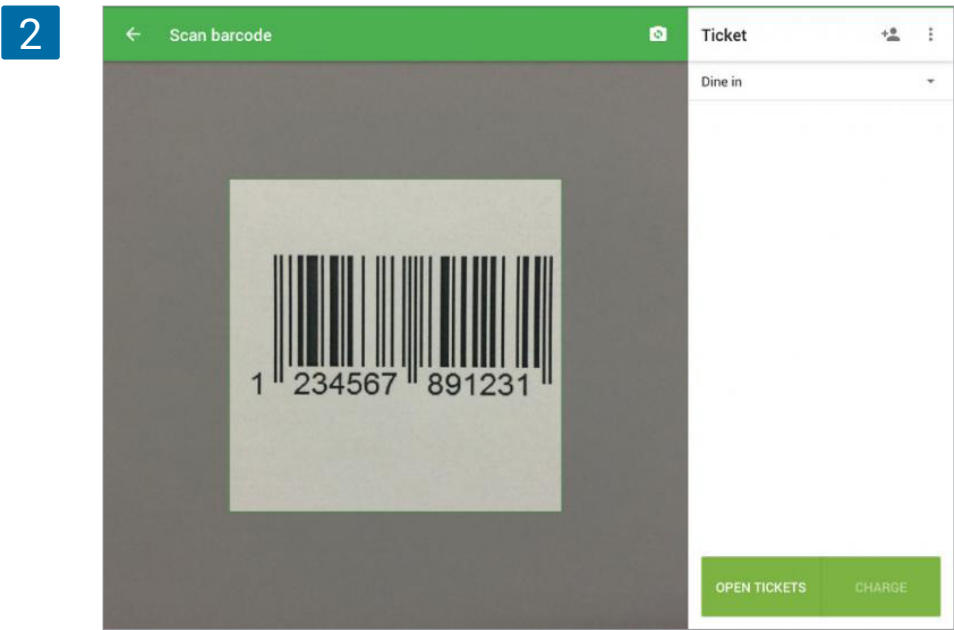


## 2.6.1 Selling Items

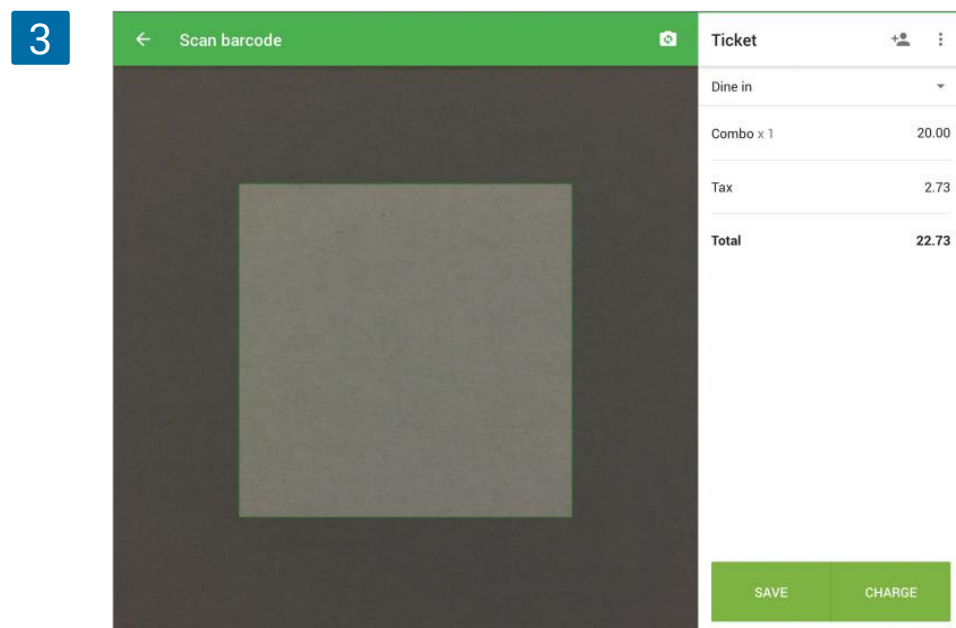
Before making sales, make sure that you have barcodes on the item's card. Launch your Loyverse POS app and go to the Sales screen, same as when selling without a scanner. Tap the button for scanning barcodes with the built-in camera.



Point the camera at the barcode of your item.



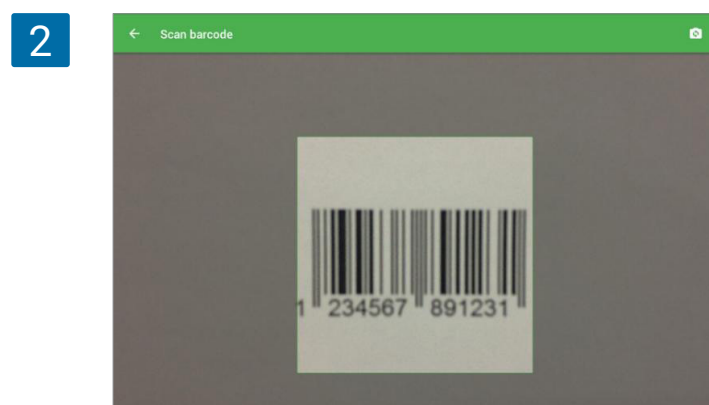
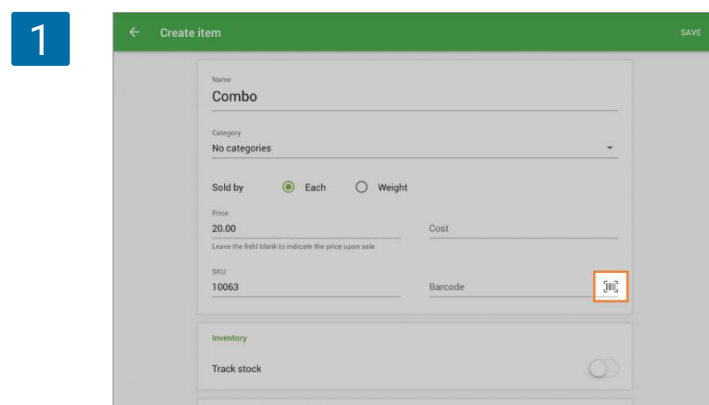
The camera will scan the barcode and the item will appear on the ticket list.



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.

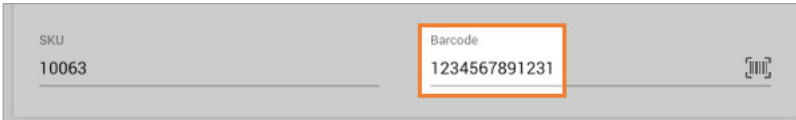


The screen with the camera will be activated, so point the camera at the barcode.



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

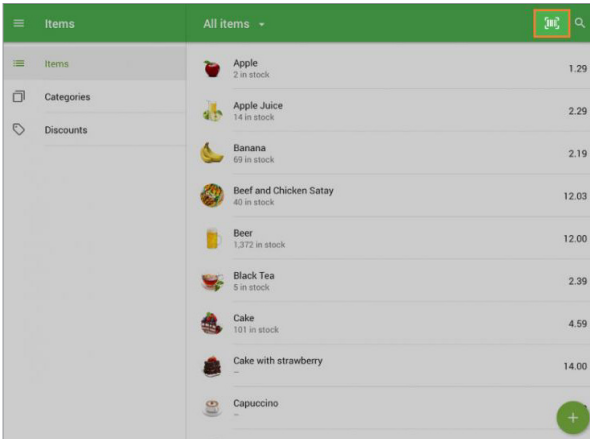
3



SKU  
10063

Barcode  
1234567891231

4



Items

All items

Apple 2 in stock 1.29

Apple Juice 14 in stock 2.29

Banana 69 in stock 2.19

Beef and Chicken Satay 40 in stock 12.03

Beer 1,372 in stock 12.00

Black Tea 5 in stock 2.39

Cake 101 in stock 4.59

Cake with strawberry 14.00

Capuccino

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

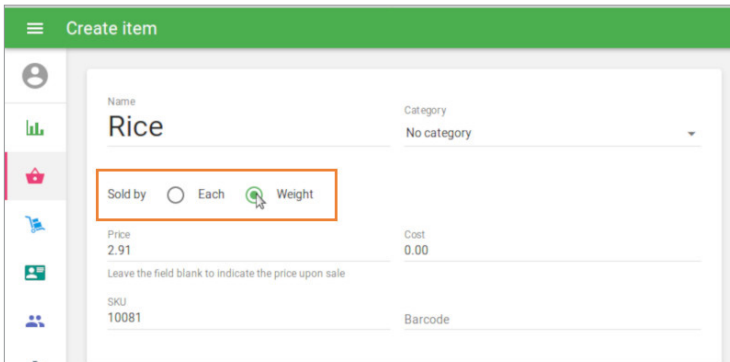
Loyverse POS with built-in camera can scan UPC-A, UPC-E, EAN-13, EAN-8, Code 39, Code 93, Code 128 barcodes and QR code as well.

## 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



Create item

Name  
Rice

Category  
No category

Sold by  
☐ Each ☒ Weight

Price  
2.91

Cost  
0.00

Leave the field blank to indicate the price upon sale

SKU  
10081

Barcode

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

← Edit item

SAVE

Name

Apple

Category

Fruits

Sold by

☐ Each

☒ Weight

Price

1.29

Average cost

1.50

Leave the field blank to indicate the price upon sale

Value updates automatically when you receive inventory

SKU

10073

Barcode

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

All items

×

Apple

Quantity

2.8

1

2

3

4

5

6

7

8

9

0

OK

CHARGE

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

4

All items

Apple

Apple Juice

Banana

Banana cake

Beef and Chicken Sat...

Beer glass

Berry cake

Black Tea

Cake

Cake with strawberry

Ticket

Dine in

Apple x 2.800

3.61

Tax

0.45

Total

4.06

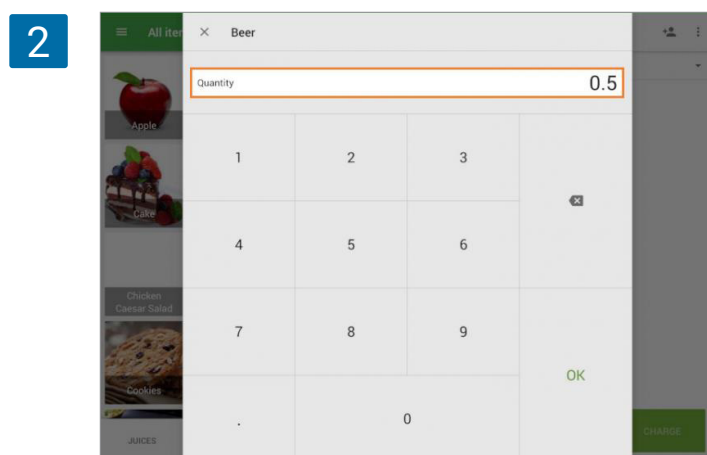
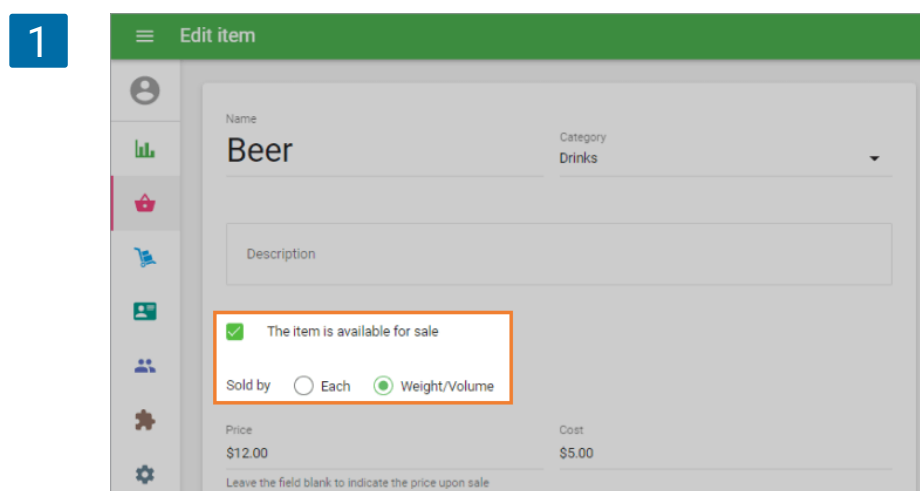
## 2.8 How to sell liquids

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](#)).

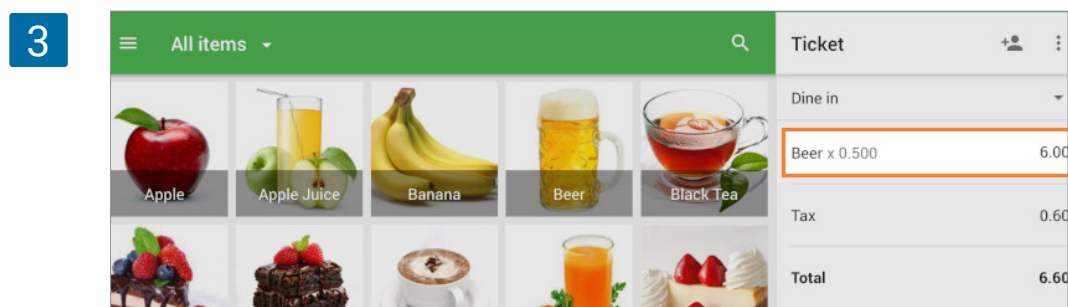
Enter the item price per one liquid measure, for example per one liter (you may indicate the measure in the name of the item, for instance, 'Beer 1L'). Save your edits.



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.



## 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

The screenshot shows the 'Edit item' form for an item named 'Beer'. The category is 'Drinks'. The 'Description' field is empty. A checkbox labeled 'The item is available for sale' is checked. The 'Sold by' section has 'Each' selected. The 'Price' is \$12.00 and the 'Cost' is \$5.00. The 'SKU' is 10018. The 'Inventory' section shows 'In stock' at 9,000 and 'Low stock' at 5,000. The 'Track stock' toggle is turned on.

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

The screenshot shows the 'Create item' form for a new item named 'Beer 0.5L'. The category is 'No category'. The 'Description' field is empty. A checkbox labeled 'The item is available for sale' is checked. The 'Sold by' section has 'Each' selected. The 'Price' is \$6.00 and the 'Cost' is \$2.50. The 'SKU' is 10010. The 'Inventory' section shows 'In stock' at 9,000 and 'Low stock' at 5,000. The 'Track stock' toggle is turned on. The 'Component' table shows one component: 'Beer' (SKU 10018) with a quantity of 0.500 and a cost of \$2.50. The 'Total cost' is \$2.50.

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.

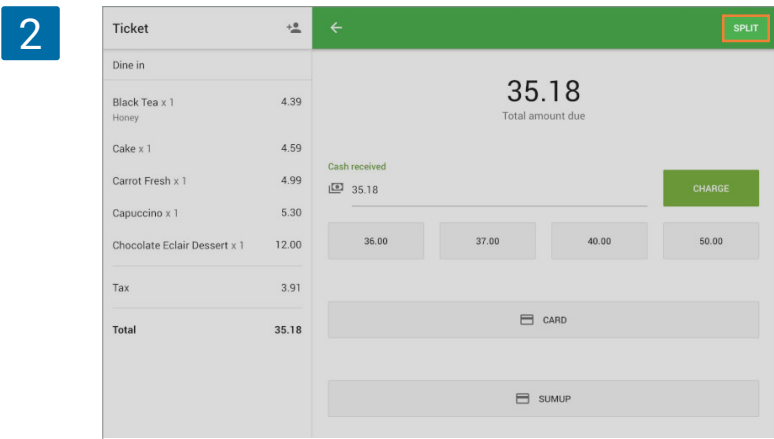
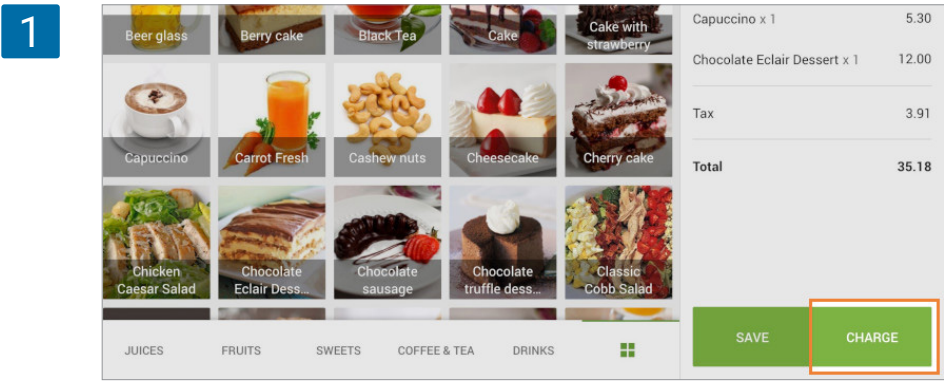
For example, you are selling Beer by a volume of 500 ml. Create a composite item "Beer 0.5 L". Choose the component 'Beer', and set the appropriate quantity. In this case, it is 0.5 L.

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.

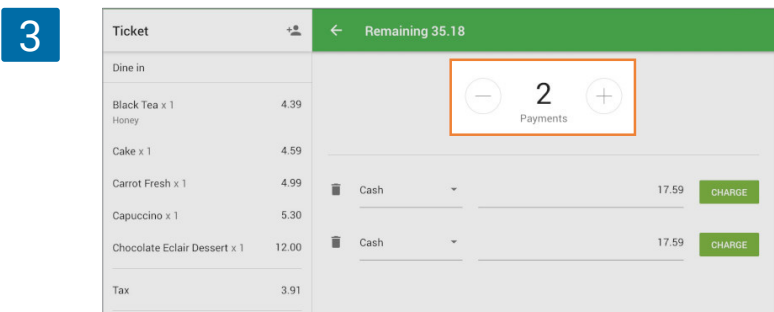
# 2.9 How to Split Payment with Loyverse POS

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.

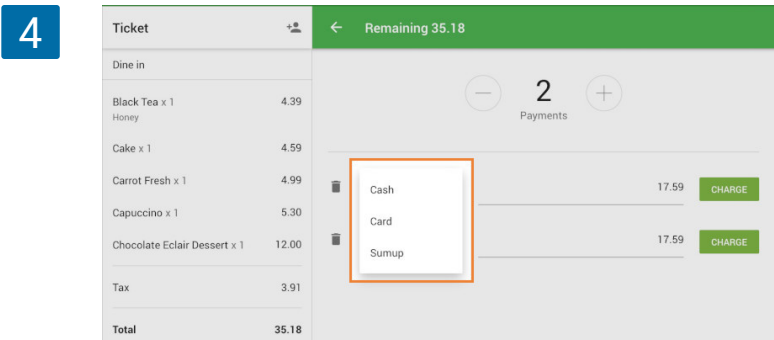
After adding items to the ticket, tap 'Charge'.



In the payment window, tap 'Split'.



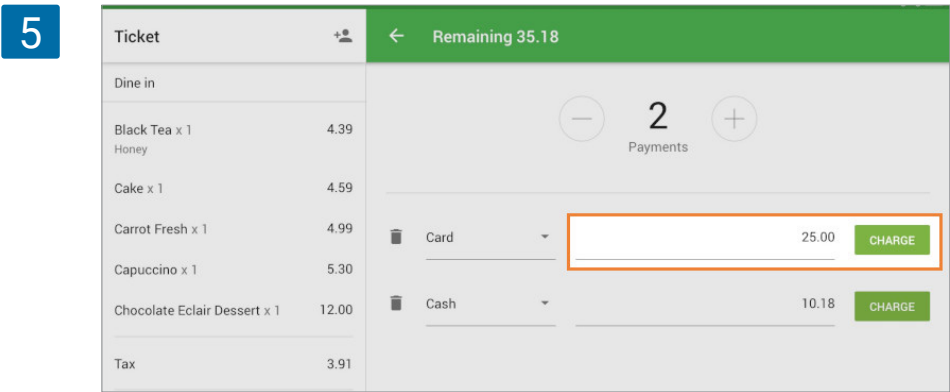
Use '+' or '-' buttons to set up the number of partial payments.



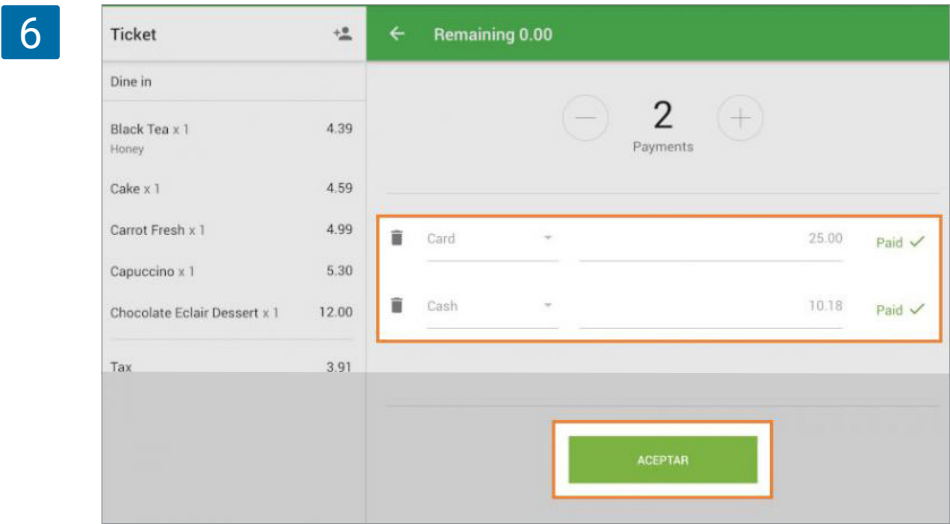
By default, the entire amount will be split evenly.

Select the payment type for each payment.

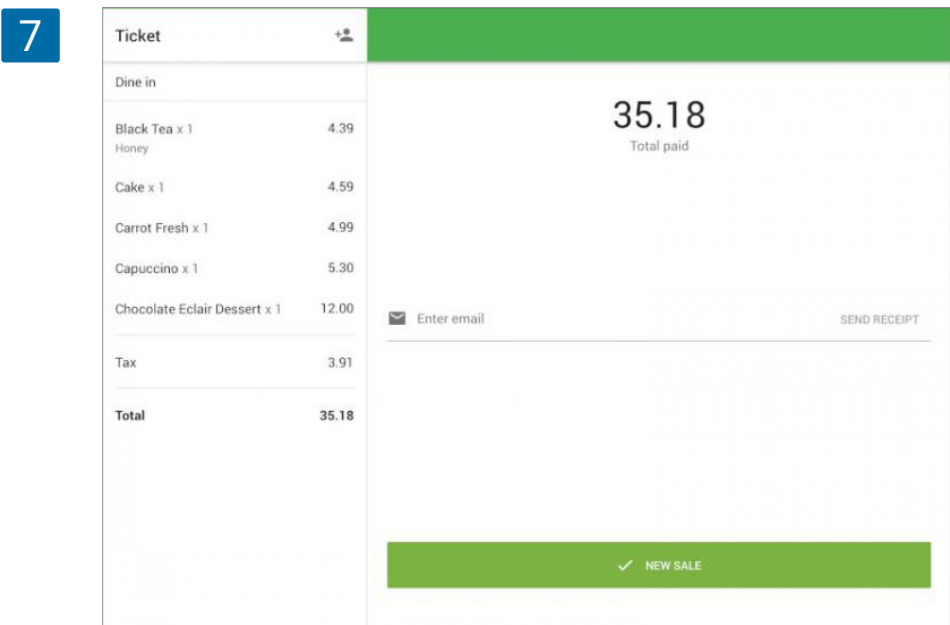
If you need, enter a custom amount for each partial payment and accept the payments by tapping the 'Charge' button.



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



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



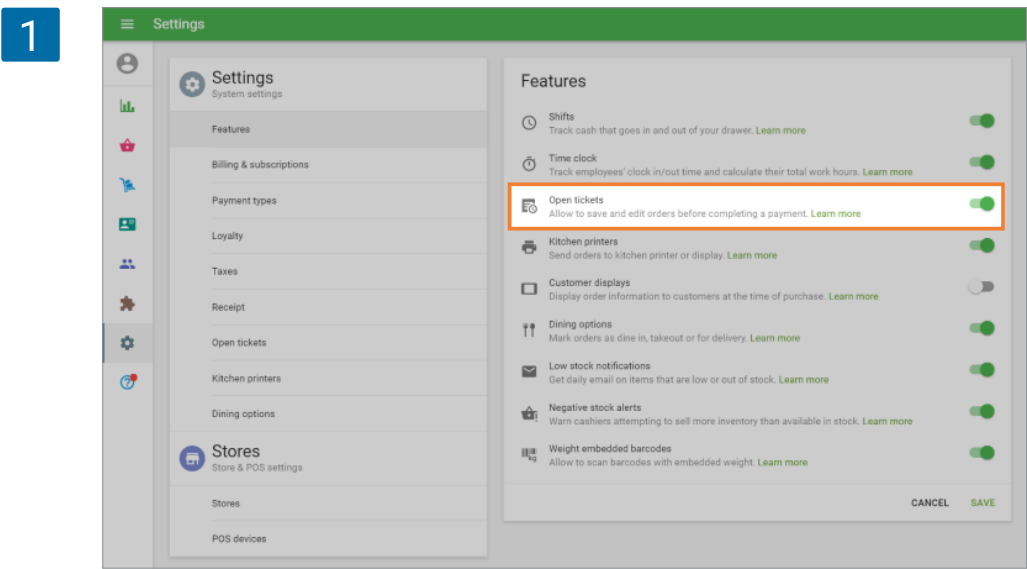
# 2.10 Open Tickets

‘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.

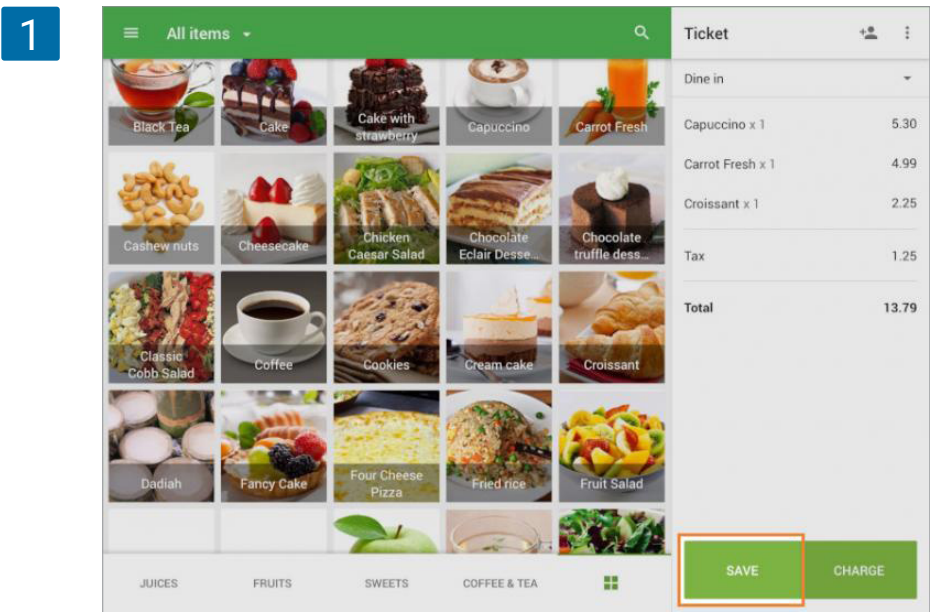
## 2.10.1 Settings

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



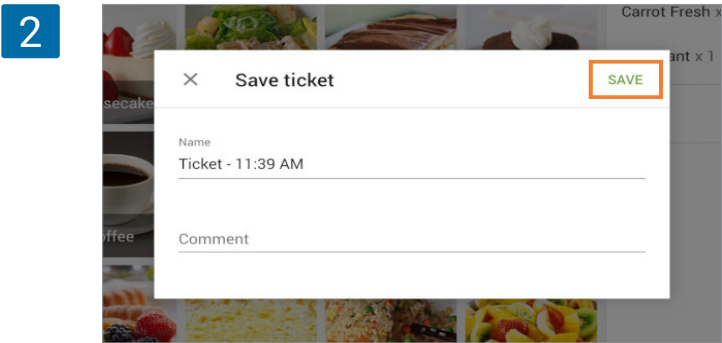
## 2.10.2 Open ticket creation

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



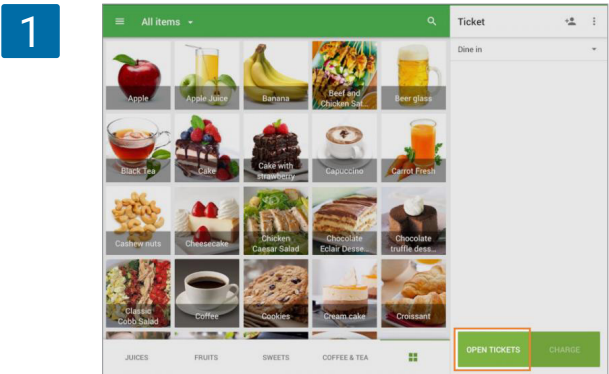


In the opened window, you can edit the name of the ticket (it will be generated automatically with reference to the current time) and add a comment to it. Click the 'Save' button to save the ticket.

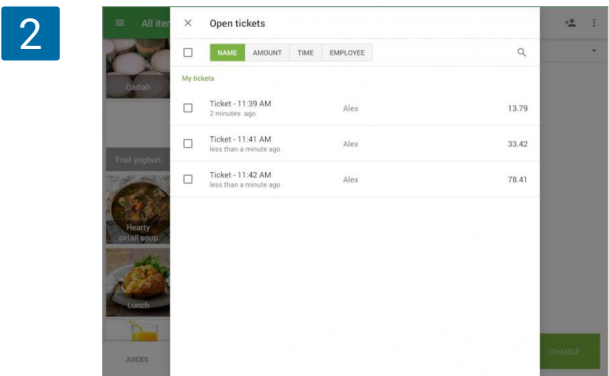


If you have the predefined ticket functionality on, you have to select one from the predefined ticket list. Afterward, the column with the ticket becomes clear, and you can work with other clients.

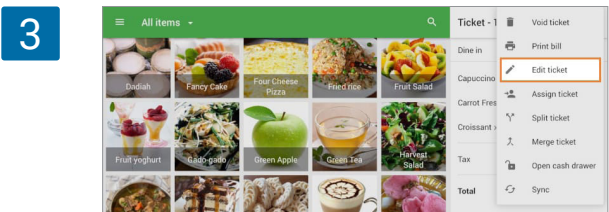
### 2.10.3 Searching and editing



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



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.



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'.

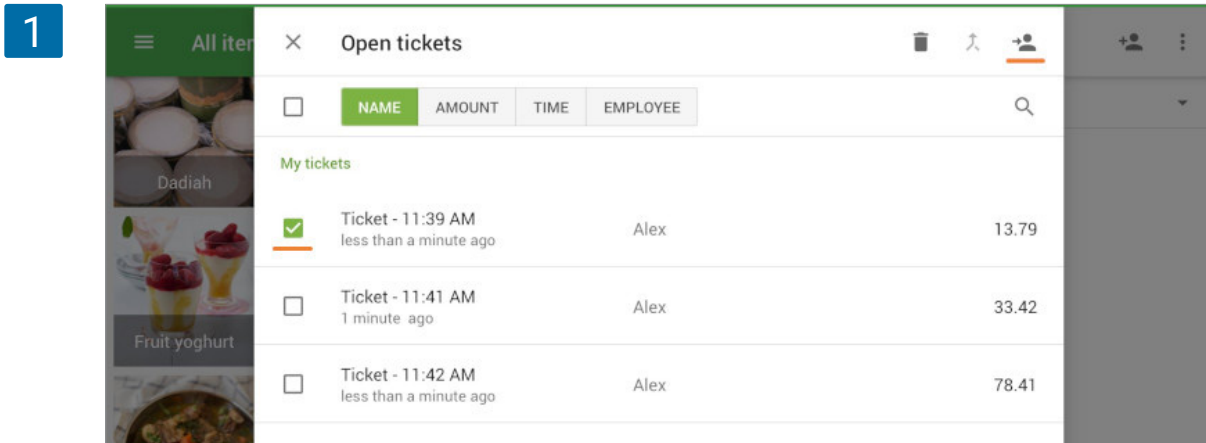
If you need to edit the name of the ticket or the comment attached to it, tap 'Edit ticket' in the three-dot menu.



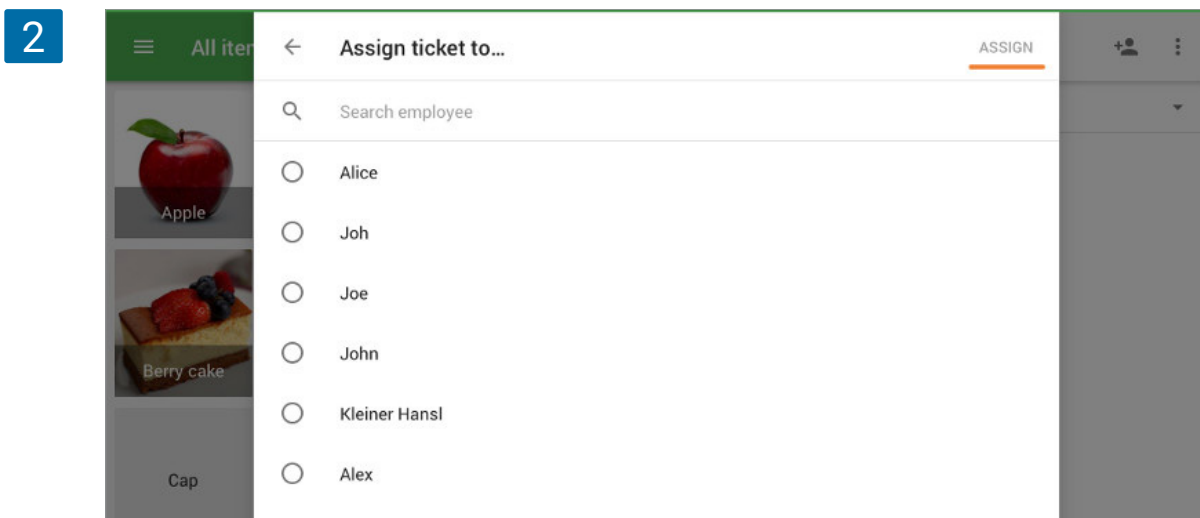
## 2.10.4 Assigning and Removal

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

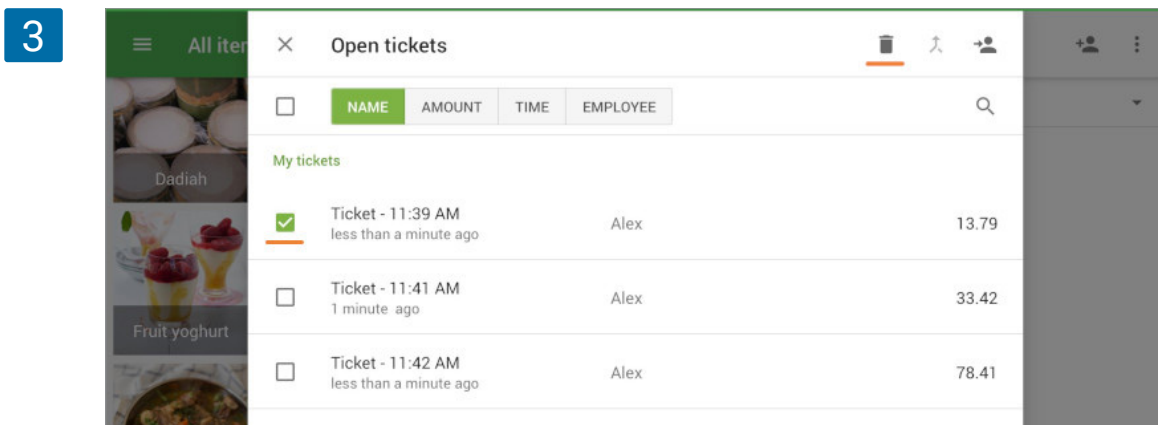
In the open ticket list, check the necessary tickets and tap the icon at the upper right-hand corner of the screen.



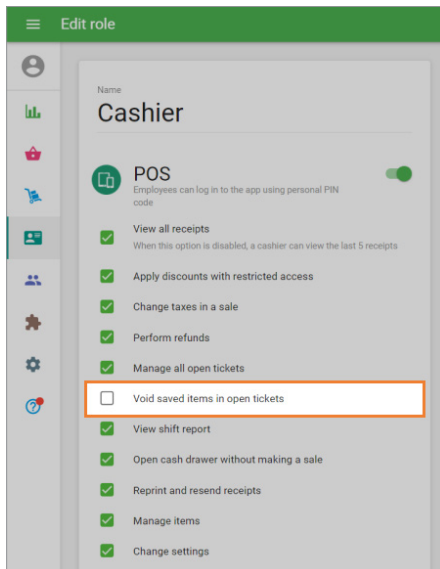
Through search, choose the employee and click the 'Assign' button.



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



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.

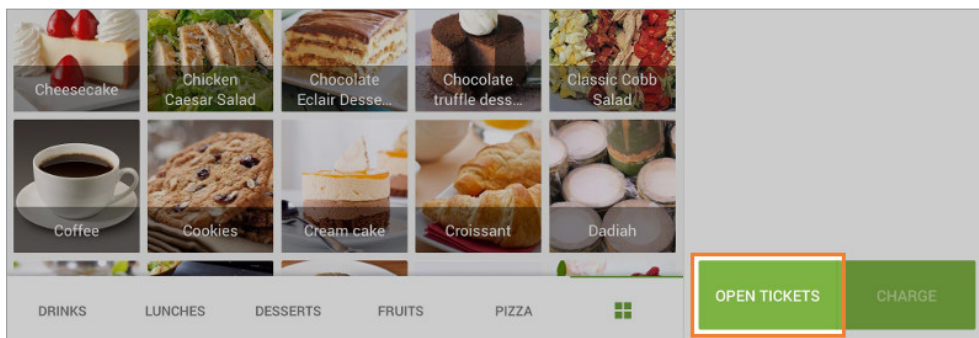
## 2.11 How to Merge Open Tickets with Loyverse POS

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.

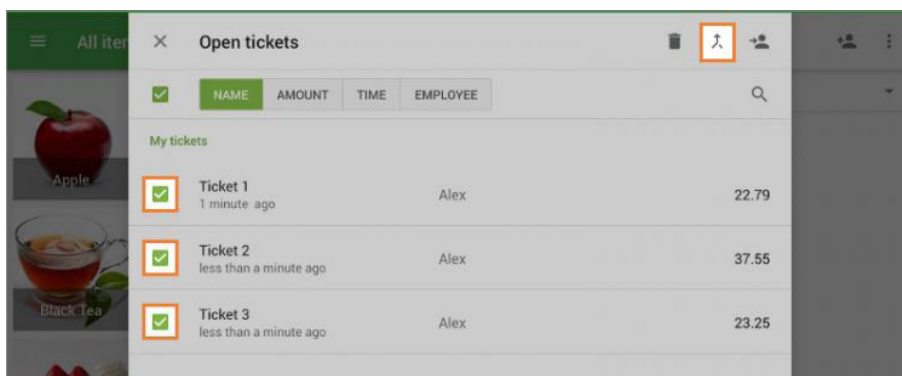
Go to open tickets list from the sale screen by clicking 'Open tickets'.

1

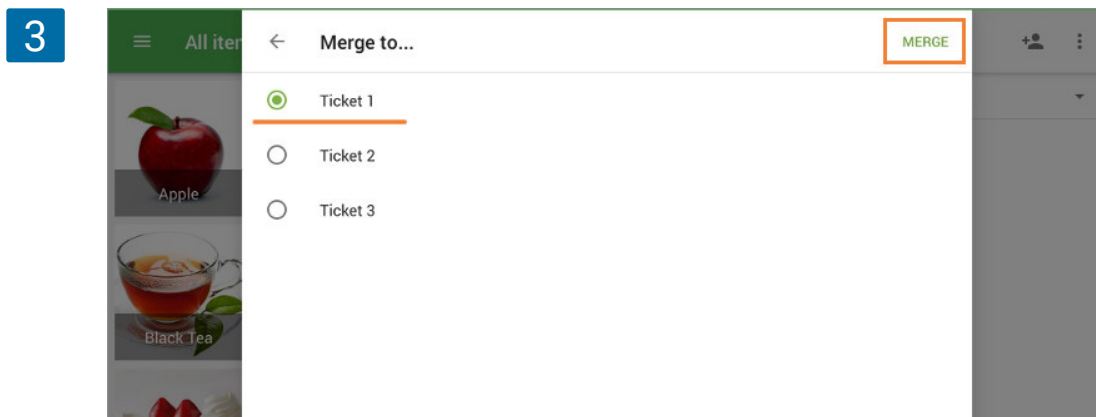


Mark the checkbox of the tickets you would like to merge, and then select the 'Merge' icon at the top right-hand corner.

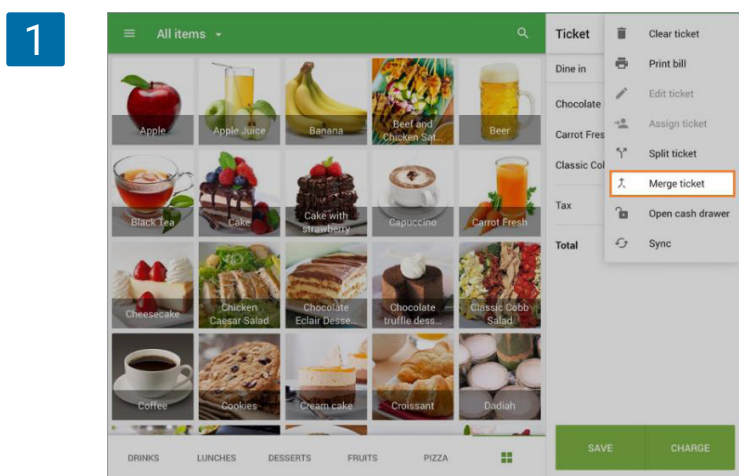
2



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

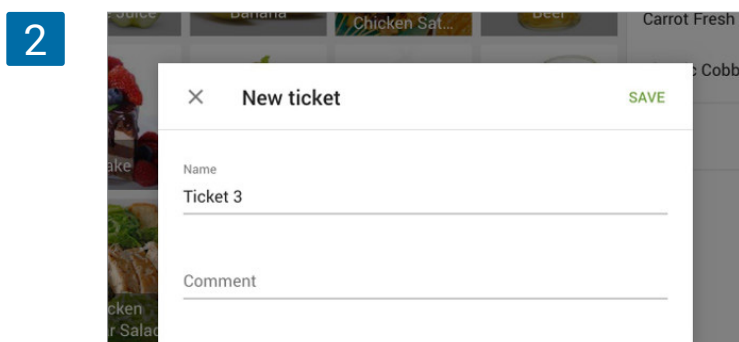


## 2.11.2 Merging tickets in the sale screen

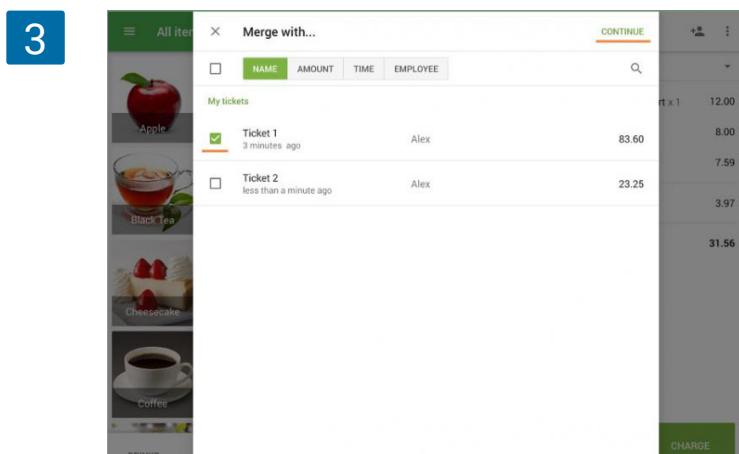


You can merge open ticket directly from the sale screen.

Tap the 'Merge ticket' button by tapping the three dots.

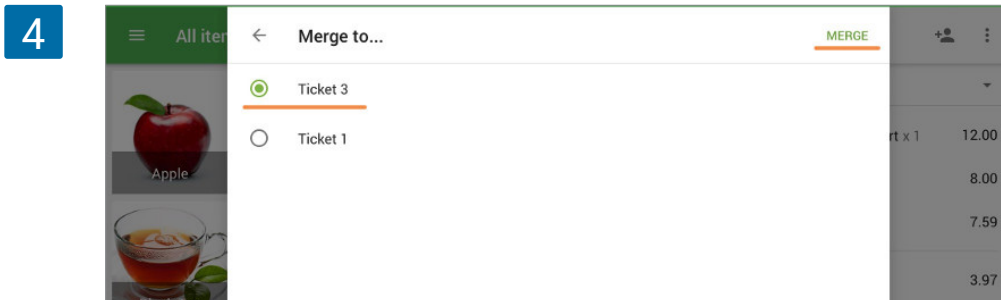


In the open window, you can edit the name and comment on the ticket. Tap 'Save' to go to the next step.



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

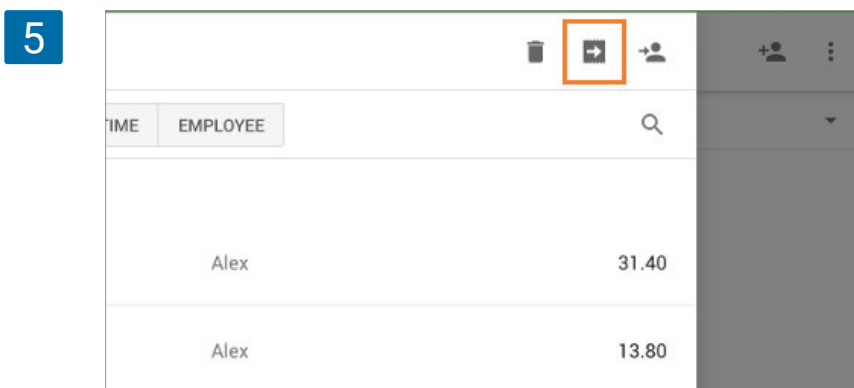
Select a name for the merged ticket and tap 'Merge' to save.



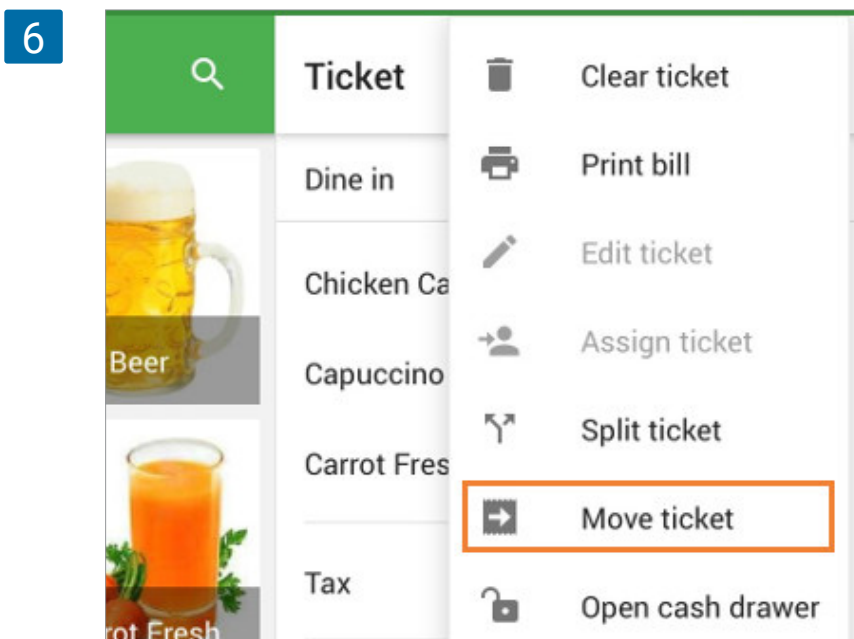
Now you can find your new ticket in the open ticket list.

#### 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.



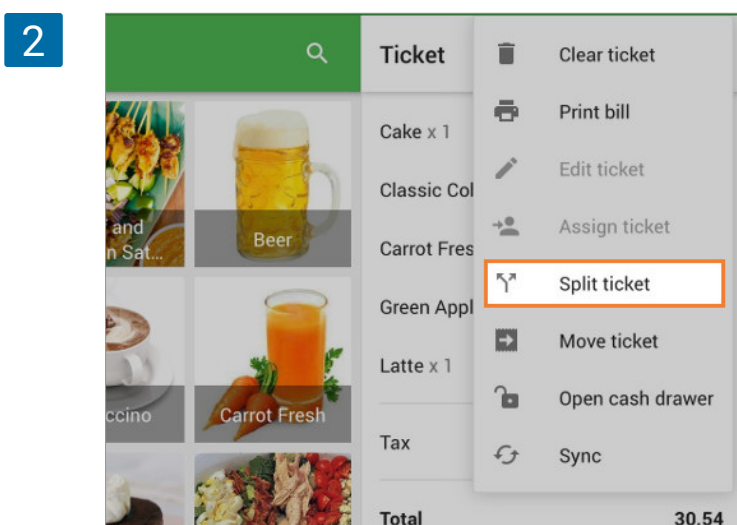
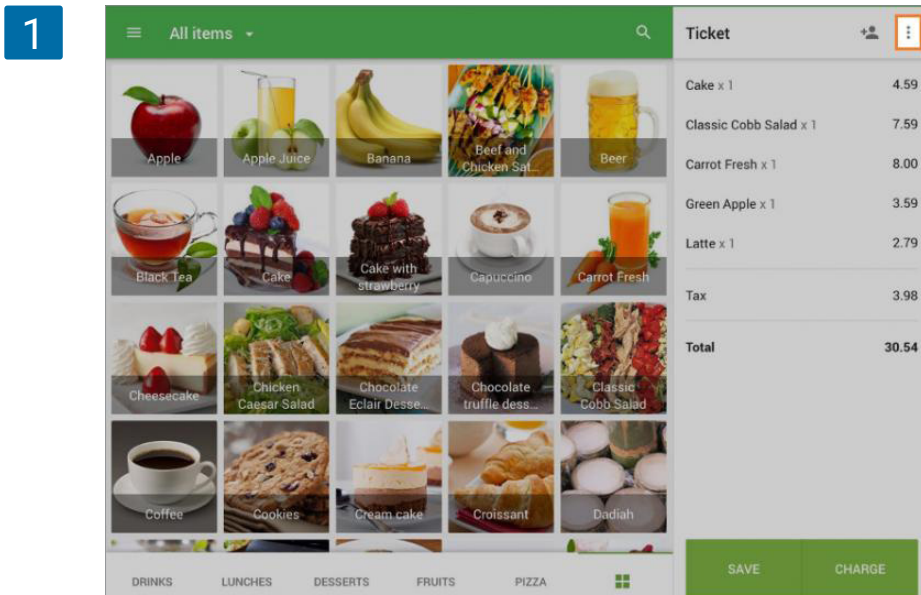
If you have the predefined tickets option on, instead of 'merge ticket', it will say 'Move ticket'. In the same way as merging, you can move your ticket to the other one.



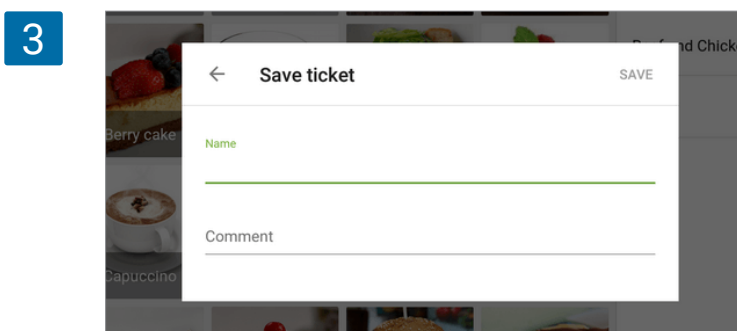
## 2.12 How to Split an Open Ticket with Loyverse POS

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](#).

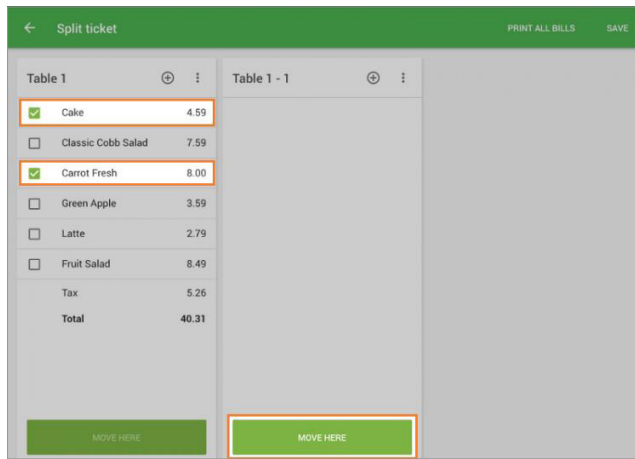
Once you have an open ticket when selling on the mobile application, click on the 'Split ticket' button by the three dots (:)



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

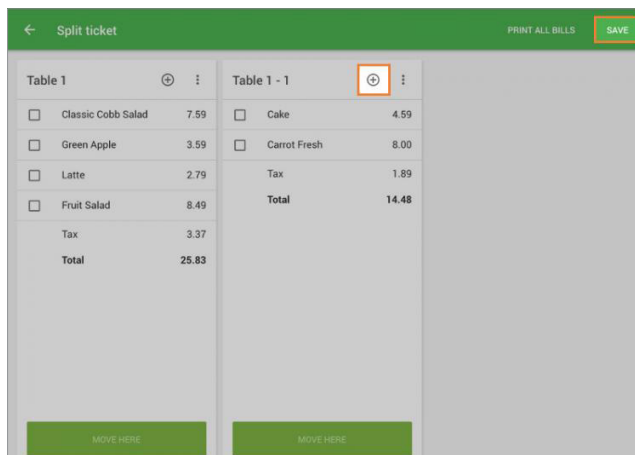


4



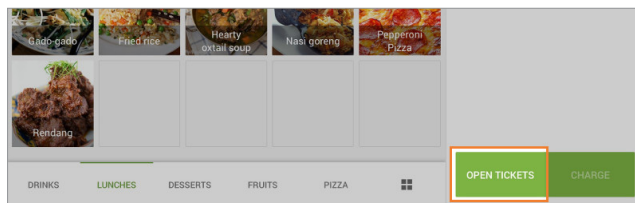
Now you'll see the 'Split ticket' screen with the original ticket on the left side and the new ticket on the right. Tap to select the items that you want to move and click the button 'Move here' on the new ticket.

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

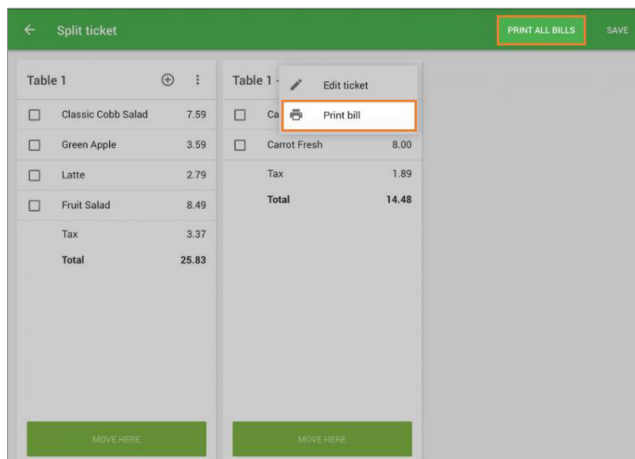


Now you can work with your split open tickets as usual. You can find new open tickets by clicking the 'Open tickets' button on the sale screen.

### 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



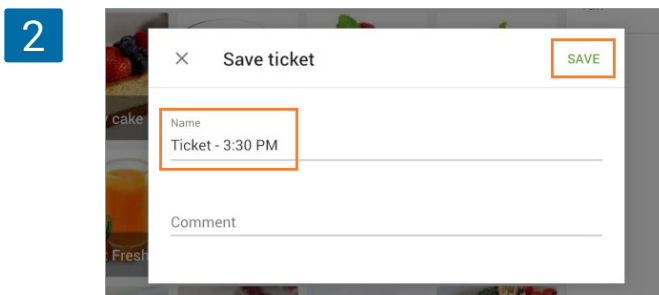
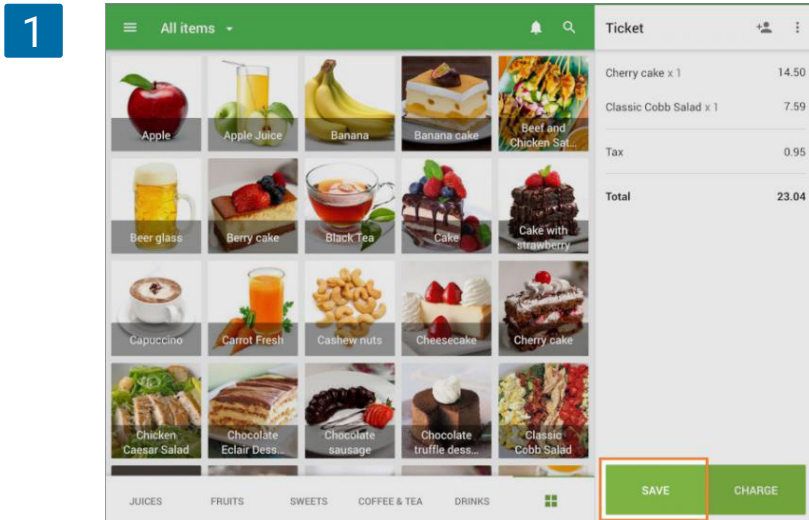
If you have a printer connected, at the 'Split ticket' screen, you can print a bill for each ticket or bills for all tickets.



## 2.13 Open Tickets Synchronization

The 'Open tickets' option should be activated in your [Back Office](#) (see [Open Tickets](#) setup).

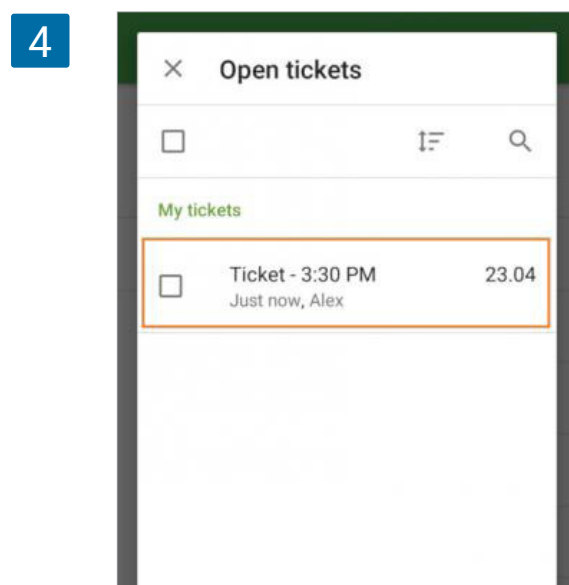
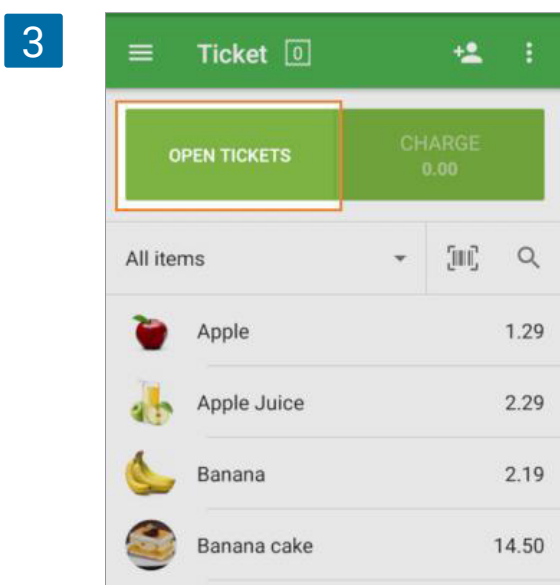
Add items to the ticket. Tap the 'Save' button to save the open ticket.



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

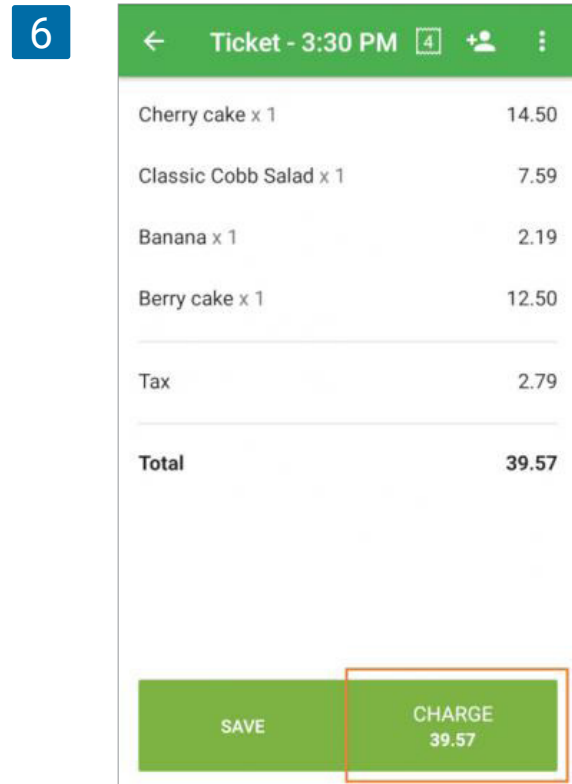
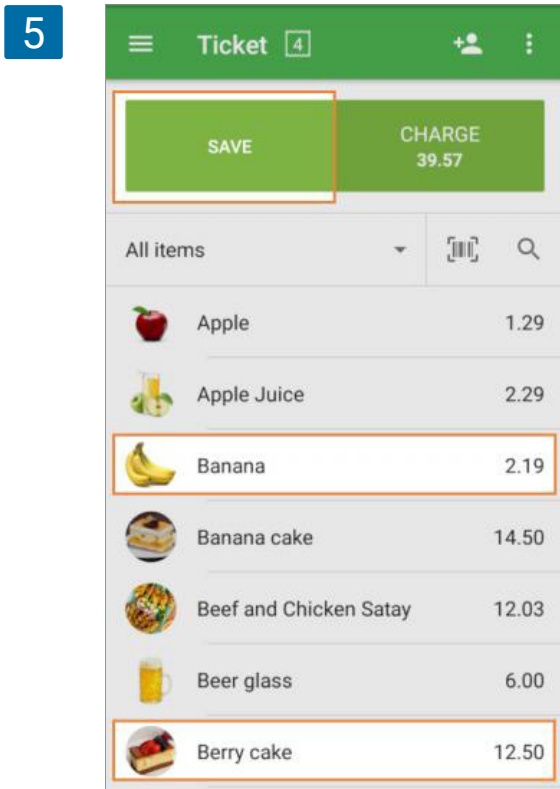
The list of open tickets can be seen on any POS device in the same shop and can be changed or closed.

Open the saved ticket on another device.



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

Click on 'Charge' to complete the sale.



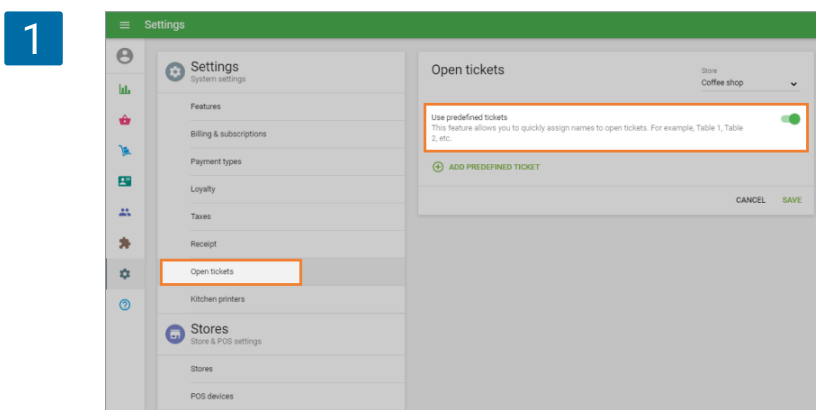
## 2.14 How to Use Predefined Open Tickets to Name Tables

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.

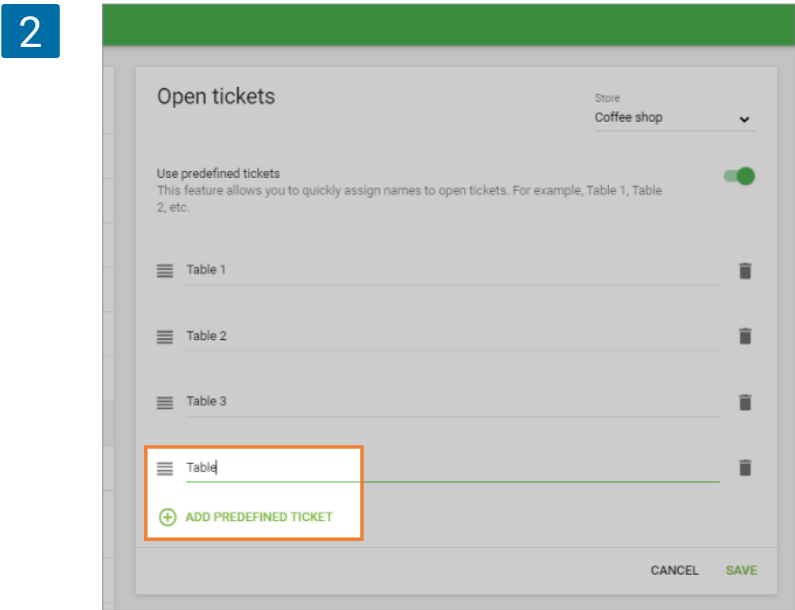
### 2.14.1 Configuration

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



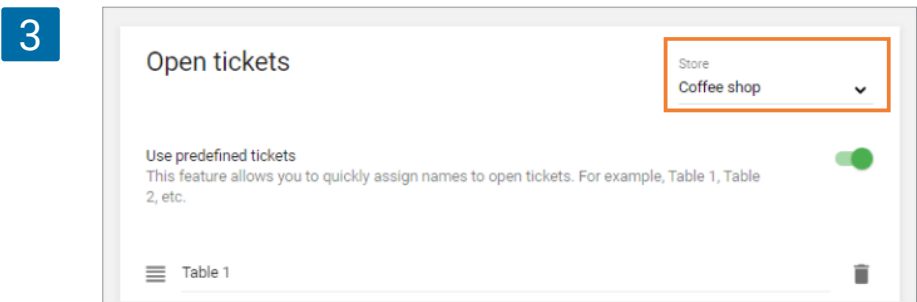


You can create a new open ticket by clicking on the 'Add predefined ticket' button and name it, for example, Table 1, Table 2, etc.



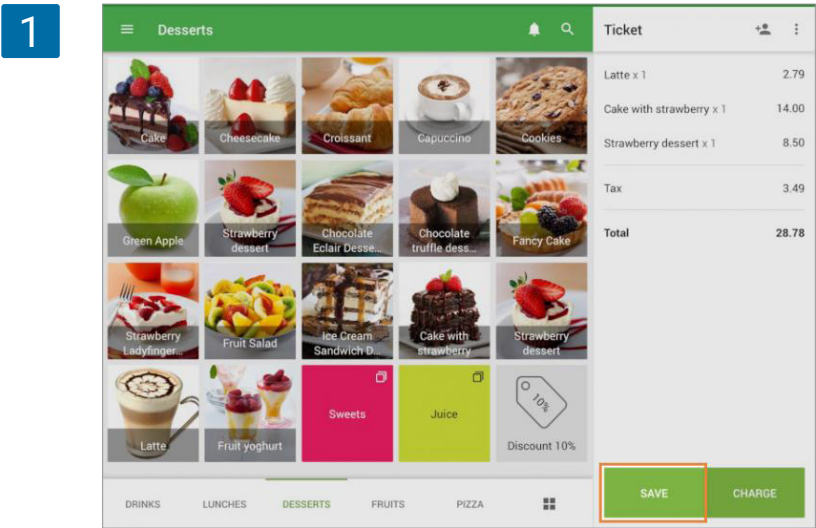
Don't forget to save changes.

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.

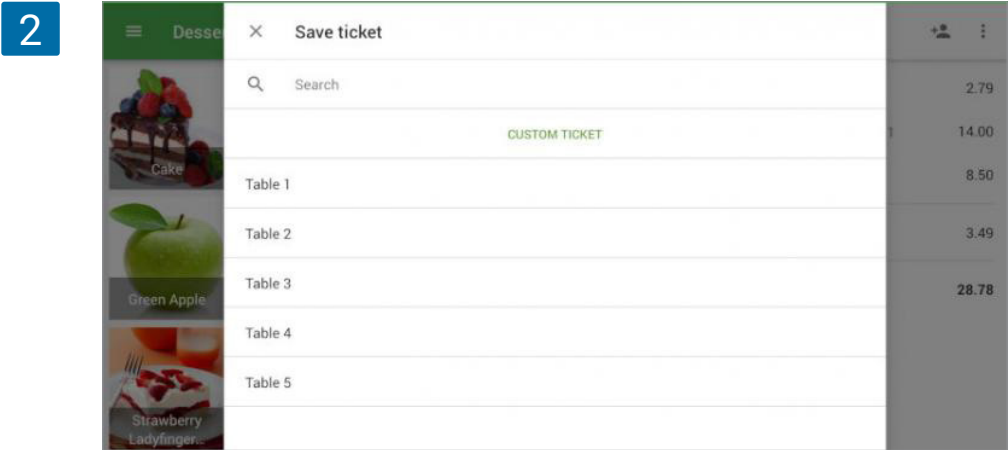


### 2.14.2 Creating Open Tickets

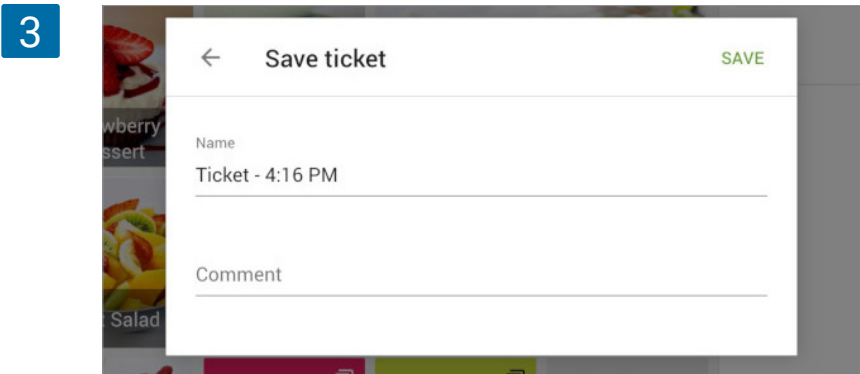
During sales, in the Loyverse POS app, when your ticket is formed, click on the 'Save' button.



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.



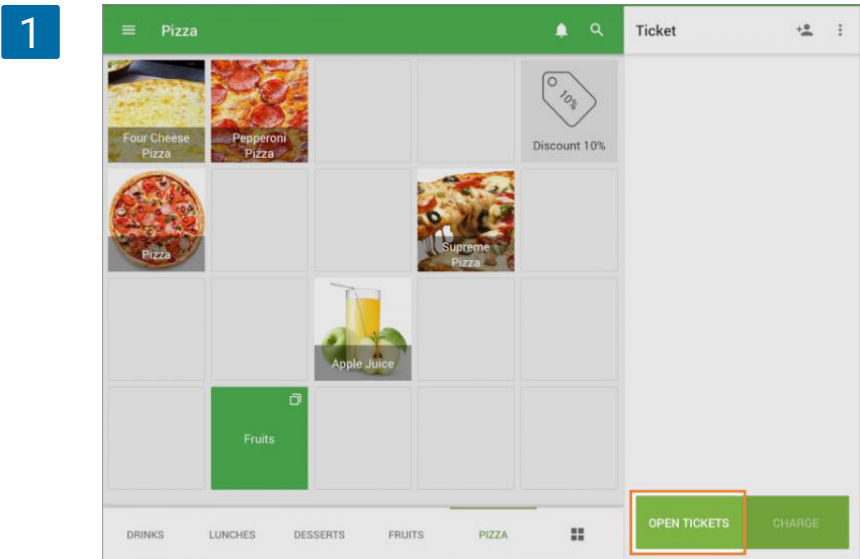
You can also choose 'Custom ticket' instead of predefined one; just fill in its Name and Comment fields and tap 'Save'.

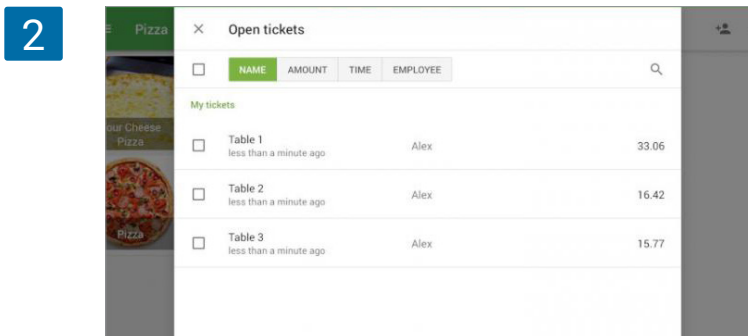


### 2.14.3 Editing Open Tickets

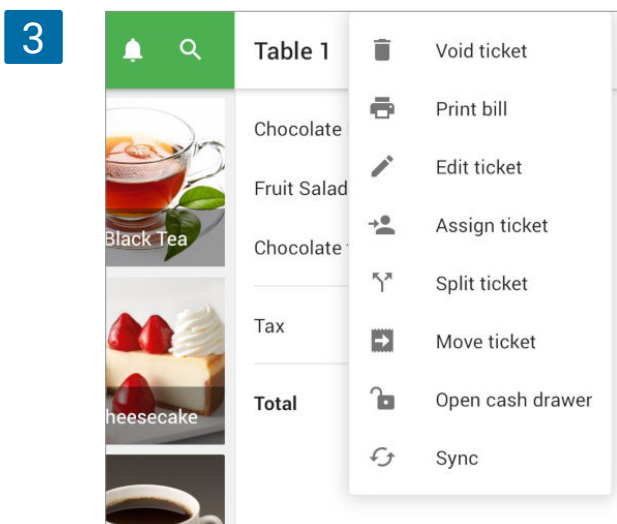
You can edit, split, or move saved predefined open tickets.

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

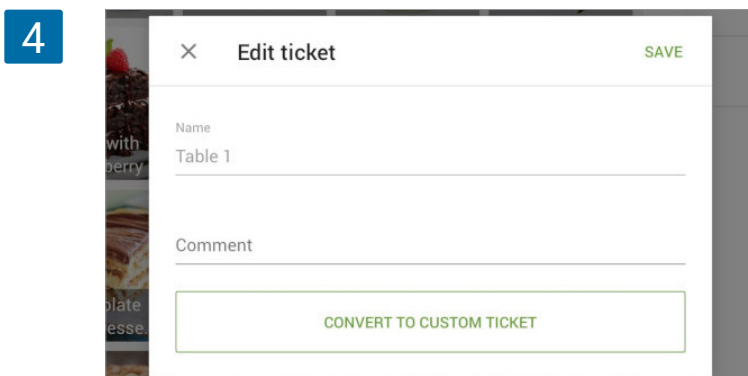




Tap the ticket from the list to edit.



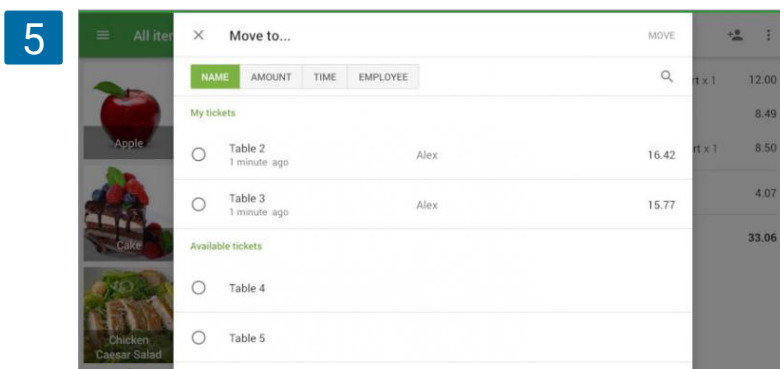
In the three-dot menu, you can choose edit, split, or move ticket.



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

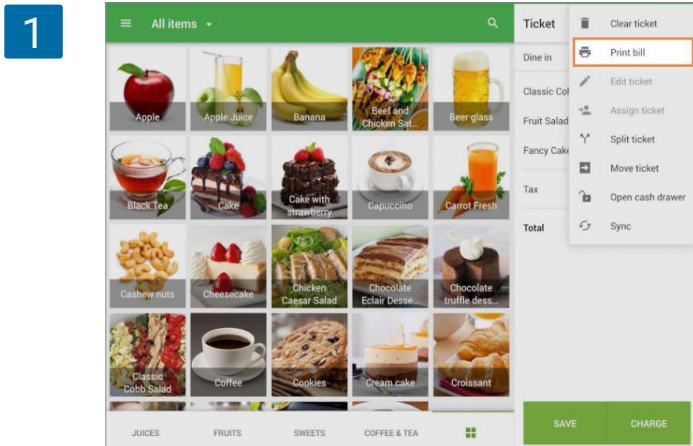
Splitting predefined tickets works the same as regular open tickets ([How to Split an Open Ticket with Loyverse POS](#)).

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'.

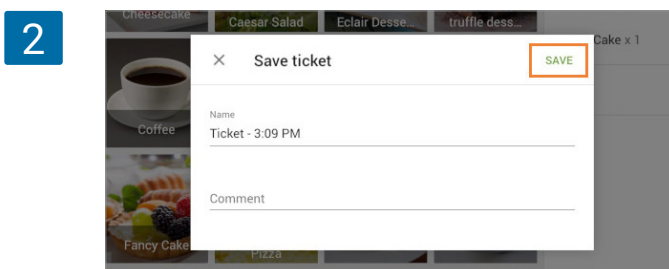


## 2.15 How to Print Bill

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](#)).

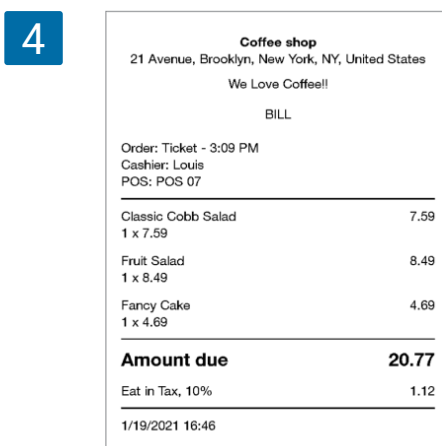
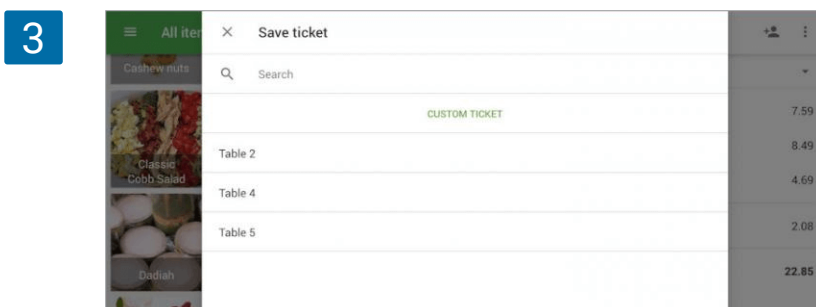


While selling on the mobile application, once you have formed a ticket, in the top right corner, press the three dots and select the 'Print bill' button from the drop-down menu.



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.



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

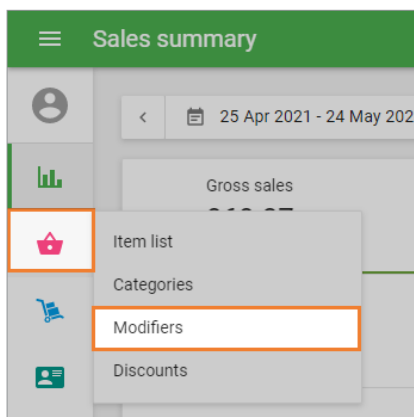
- The Bill has the title BILL at the top, while the receipt does not have it
- The bill does not have a number, which is on the bottom of the receipt
- The bill has the "Amount due" line as a summarizing amount of items, while the receipt has "Total"
- The bill does not have the type of payment line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

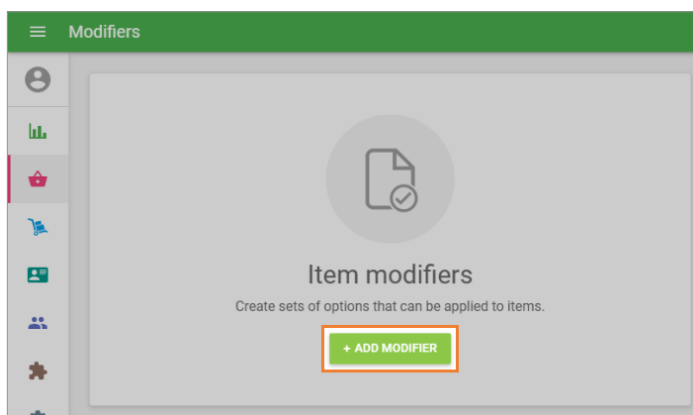
### 2.16.1 Creation and set-up of modifier

1



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

2



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

3

A screenshot of the 'Create modifier' form. The 'Modifier name' field contains 'Fillers'. Below it is a table with four rows of options. The 'ADD OPTION' button at the bottom is highlighted with a green rectangular box. The 'STORES' dropdown is set to 'Available in all stores'. At the bottom are 'CANCEL' and 'SAVE' buttons.

Option name	Price	
Cinnamon	0.50	
Cream	0.50	
Vanilla	0.40	
Muscat	0.50	

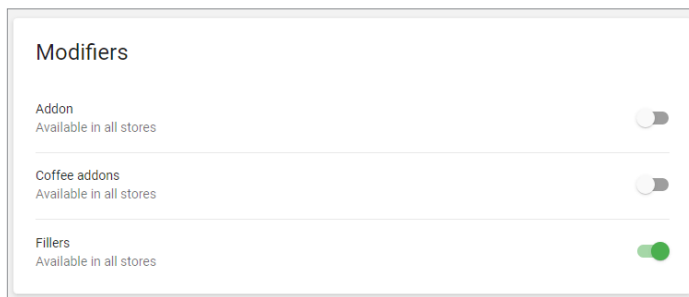
In the 'Create modifier' form, enter the modifier name. Then fill in the 'Option name' and 'Price' fields. During a sale, the price of the applied option will be added to the item's price. To create more options, click 'Add option'.

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



Modifiers

Addon  
Available in all stores ☐

Coffee addons  
Available in all stores ☐

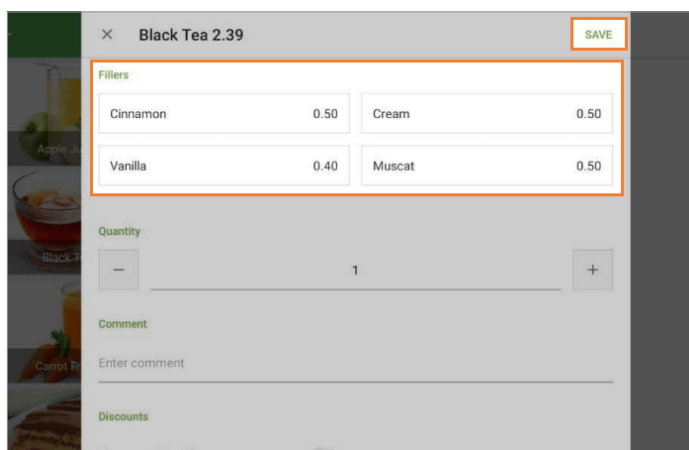
Fillers  
Available in all stores ☒

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



Black Tea 2.39 SAVE

Fillers

Cinnamon	0.50	Cream	0.50
Vanilla	0.40	Muscat	0.50

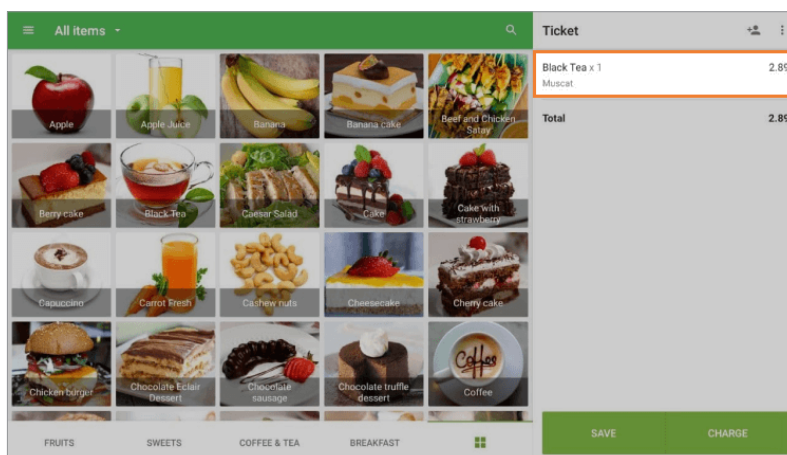
Quantity:

Comment: Enter comment

Discounts: Discount 10% 10%

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

2



All Items SEARCH

Ticket

Black Tea x 1	2.89
Muscat	
Total	2.89

SAVE CHARGE

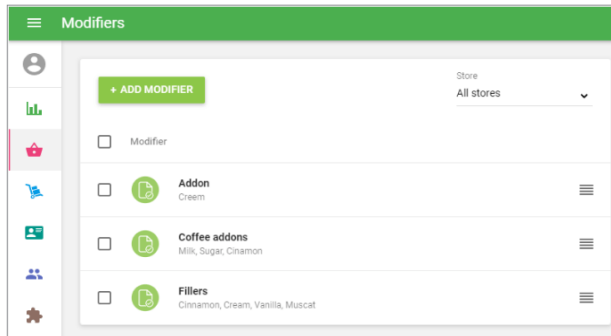
Then continue all the same steps as in usual checkout process. Taxes and discounts on the goods are already calculated taking into account the modifiers added to them.

3

Modifier	Quantity sold	Gross sales
Addon	1	0.50
Cream	1	0.50
Fillers	1	0.50
Muscat	1	0.50

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.

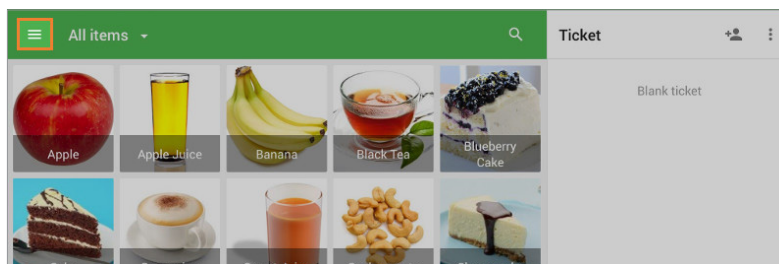
### Note

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

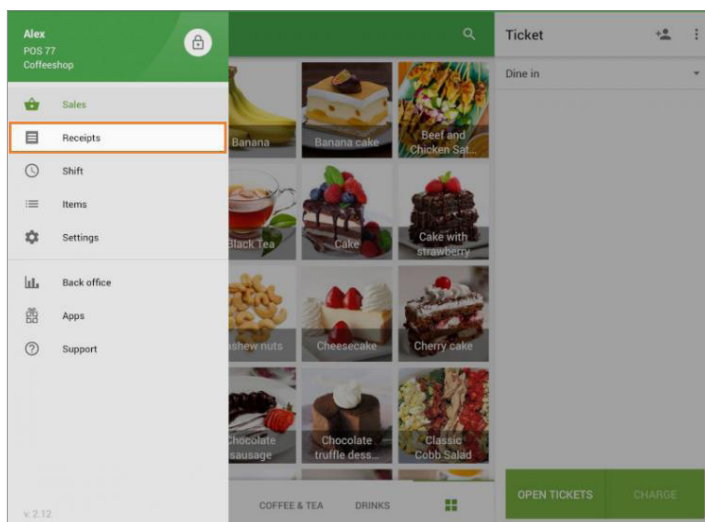
## 2.17 How to Issue a Refund on Loyverse POS

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

The screenshot shows the 'Receipts' screen with a list of receipts on the left and a detailed receipt for #1-1008 on the right. The 'REFUND' button is highlighted in the top right corner.

Receipts	#1-1008
8.20 11:33 AM #1-1008	<p>8.20 Total</p> <p>Cashier: Owner</p> <p>Green Tea 1 x 2.50 2.50</p> <p>Peanuts 1 x 2.60 2.60</p> <p>Blueberry Cake 1 x 3.10 3.10</p> <p>Total 8.20</p> <p>Cash 10.00</p> <p>12/30/17, 11:33 AM #1-1008</p>
2.60 11:29 AM #1-1007	
1.20 11:20 AM #1-1006	
6.45 11:19 AM #1-1005	
5.49 2:55 PM #1-1004 Refund	
4.29 #1-1003	

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

4

The screenshot shows the 'Refund' screen. On the left, under 'Receipt #1-1008', the 'Peanuts x 1' item is highlighted in the 'Tap items to refund' section. On the right, the 'Refund receipt' section is empty, with a 'Tap items to put back' prompt.

Receipt #1-1008	Refund receipt
Tap items to refund	Tap items to put back
Blueberry Cake x 1 3.10	
Green Tea x 1 2.50	
Peanuts x 1 2.60	
Total 8.20	

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

The screenshot shows the 'Refund' screen. The 'Refund receipt' section now contains 'Peanuts x 1' and a total of 2.60. The 'REFUND 2.60' button is highlighted at the bottom.

Receipt #1-1008	Refund receipt
Tap items to refund	Tap items to put back
Blueberry Cake x 1 3.10	Peanuts x 1 2.60
Green Tea x 1 2.50	
Peanuts x 1 2.60	
Refund x 1	
Total 8.20	Total 2.60

Then tap the 'Refund' button at the bottom.

6

The screenshot shows the 'Receipts' screen. The refunded receipt #1-1009 is marked with 'Refund' in red text.

Receipts	#1-1009
2.60 11:36 AM #1-1009 Refund	<p>2.60 Total</p> <p>Cashier: Owner</p> <p>Peanuts 1 x 2.60 2.60</p> <p>Total 2.60</p> <p>Cash 2.60</p> <p>12/30/17, 11:36 AM #1-1009</p>
8.20 11:33 AM #1-1008	
2.60 11:20 AM #1-1007	
1.20 11:20 AM #1-1006	
6.45 11:19 AM #1-1005	
5.49 2:55 PM #1-1004 Refund	
4.29 2:55 PM #1-1003	

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

### Note

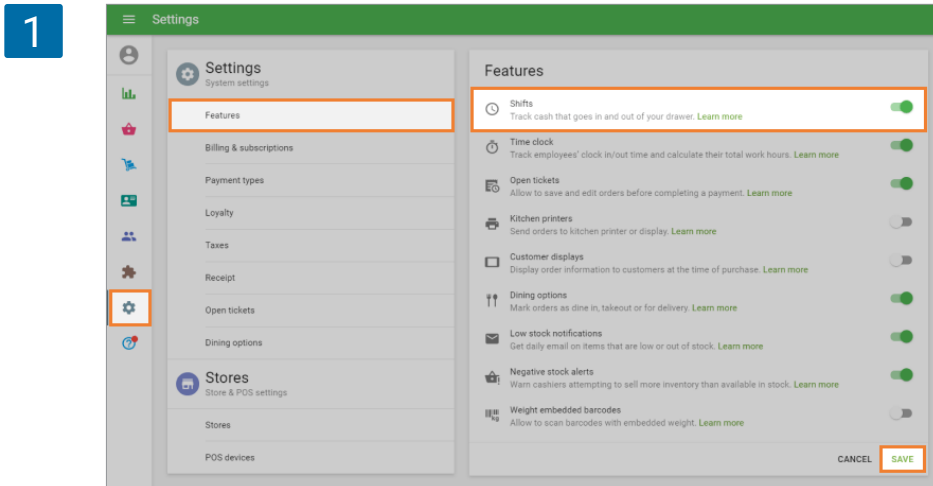
You can issue a refund only when the device is connected to the Internet. The stock of the refunded items will be increased by the quantity that has been refunded. You can process a refund of the receipts issued on other POS from the same store.



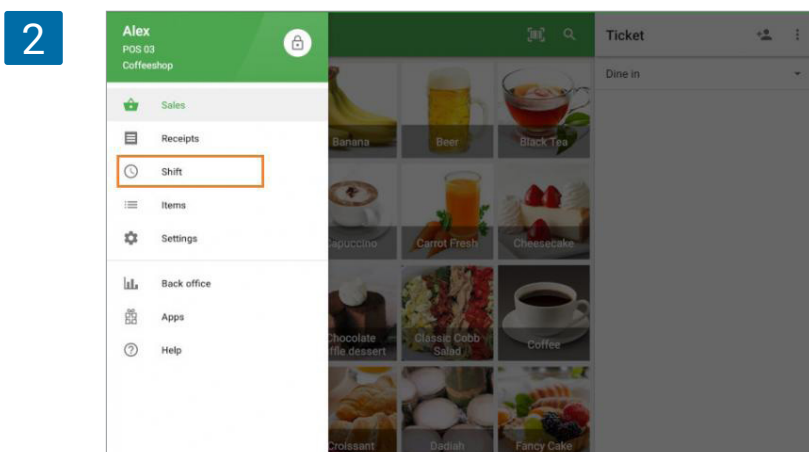
## 2.18 Shift Management in Loyverse POS

In order to use the 'Shifts' feature, log in to your [Back Office](#) and go to the Settings.

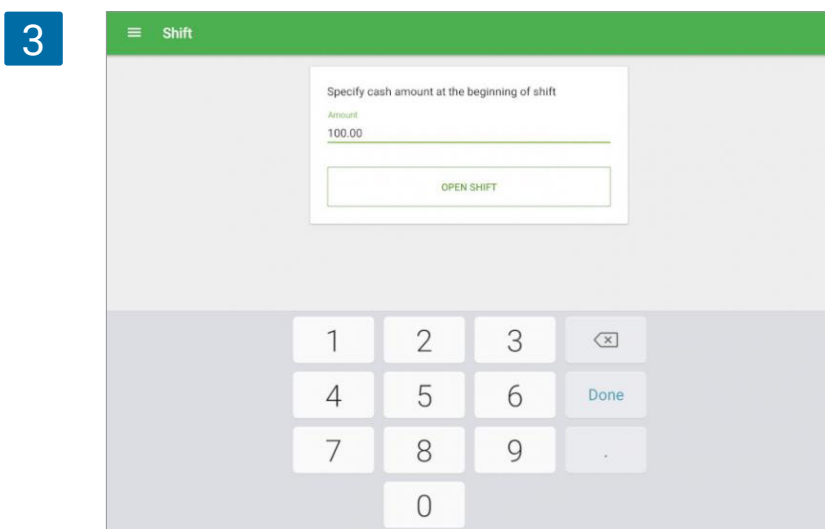
Switch on 'Shifts' option in the Features section. Click the 'Save' button.



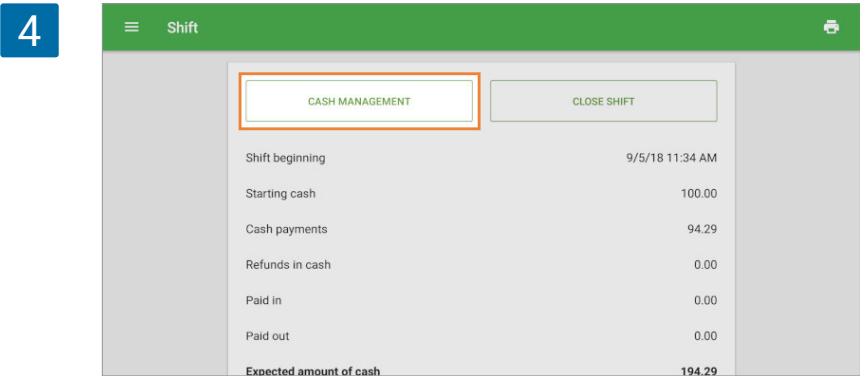
On the Loyverse POS app, go to the 'Shift' menu.



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

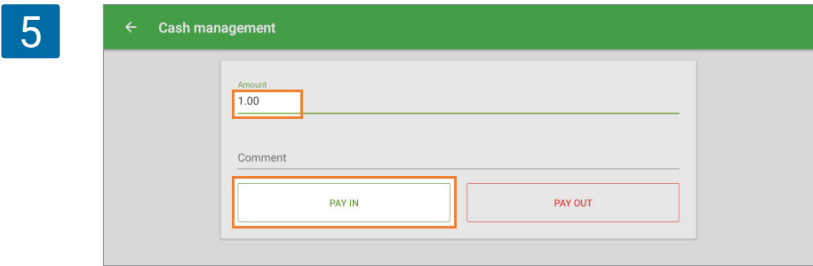


For cash management during the shift, go to the 'Shift' menu and tap the 'Cash management' button.

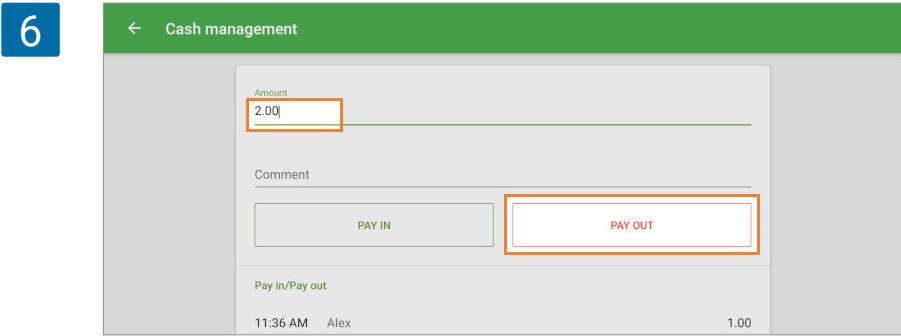


Let's say we want to pay in one dollar into the cash drawer and later pay out two dollars.

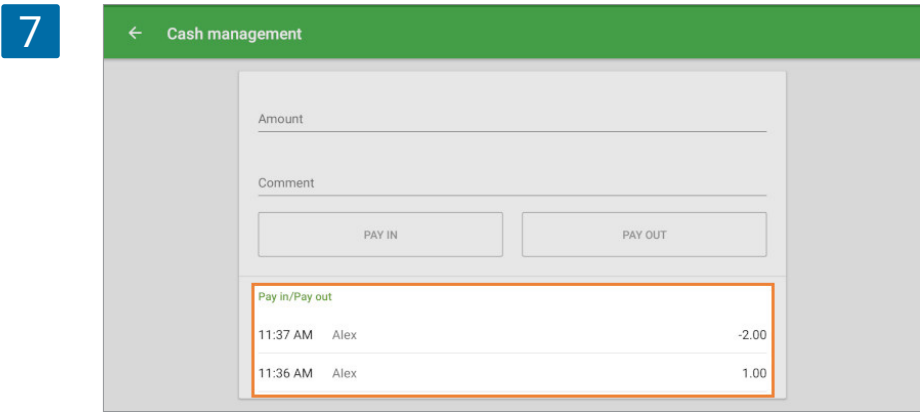
Enter the amount and tap the 'Pay In' button if you put money into the cashier without a purchase.



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



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



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

8

The screenshot shows the 'Shift' menu with a green header. Below the header, there are two buttons: 'CASH MANAGEMENT' and 'CLOSE SHIFT'. The 'CLOSE SHIFT' button is highlighted with an orange box. Below the buttons, there is a table showing shift details:

Shift beginning	9/5/18 11:34 AM
Starting cash	100.00
Cash payments	94.29
Refunds in cash	0.00
Paid in	1.00
Paid out	2.00

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

The screenshot shows the 'Close shift' form with a grey header. The form contains the following fields:

Expected cash amount	217.00
Actual cash amount	217.00
Difference	0.00
Print report	<input checked="" type="checkbox"/>

At the bottom of the form, there is a button labeled 'CLOSE SHIFT' which is highlighted with an orange box.

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

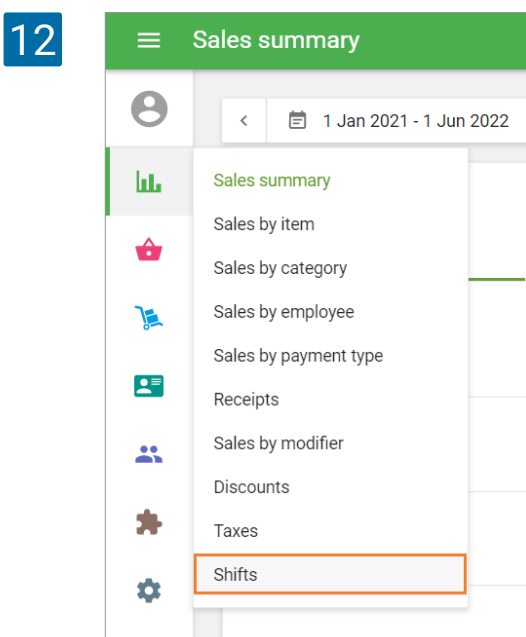
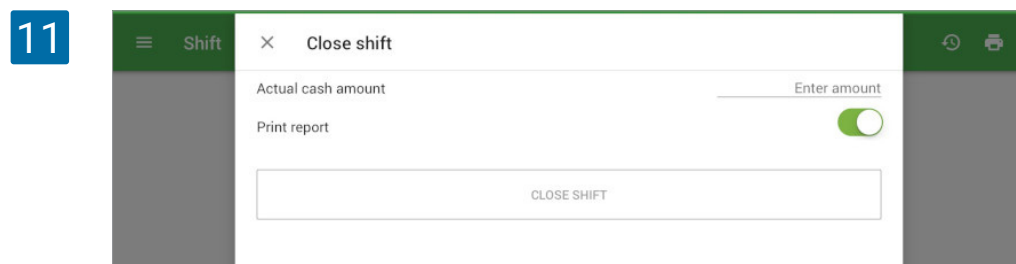
The screenshot shows the 'Edit group' screen for the 'Cashier' role. The screen has a green header and a sidebar with icons. The main content area lists various permissions for the 'Cashier' role:

- ☐ View all receipts
- ☐ Apply discounts with restricted access
- ☒ Change taxes in a sale
- ☐ Carry out purchasing returns
- ☐ Manage all open tickets
- ☐ Void saved items in open tickets
- ☐ View shift report
- ☐ Open cash drawer without making a sale
- ☐ Edit items
- ☐ Change settings

The 'View shift report' option is highlighted with an orange box.

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.'



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

POS	Opening time	Closing time	Expected cash amount	Actual cash amount	Difference
POS 1	27 May 2022, 10:59	27 May 2022, 11:00	\$700.00	\$12.34	-\$687.66
POS 1	27 May 2022, 10:57	27 May 2022, 10:59	\$114.34	\$34.44	-\$79.90
POS 1	5 May 2022, 15:40	27 May 2022, 10:57	\$5.00	\$123.45	\$118.45
POS 1	10 Dec 2021, 16:28	5 May 2022, 15:40	\$412.82	\$412.82	—
POS	20 Jan 2022, 19:17	20 Jan 2022, 19:18	\$13.56	\$13.00	-\$0.56

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

14

Shifts

<

1 Jan 2021 - 20 Jun 2022

>

All stores

EXPORT

POS	Opening time	Closing time	
POS 1	27 May 2022, 10:59	27 May 2022, 11:00	\$
POS 1	27 May 2022, 10:57	27 May 2022, 10:59	\$
POS 1	5 May 2022, 15:40	27 May 2022, 10:57	\$
POS 1	10 Dec 2021, 16:28	5 May 2022, 15:40	\$
POS	20 Jan 2022, 19:17	20 Jan 2022, 19:18	\$
POS	14 Dec 2021, 17:05	20 Jan 2022, 19:16	\$
POS 6	15 Jan 2022, 16:42	15 Jan 2022, 16:45	\$
POS 6	15 Jan 2022, 16:41	15 Jan 2022, 16:41	\$

SHIFT REPORT

Shift number: 4

Store: Coffee Shop

POS: POS 1

Shift opened: Alice27 May 2022, 10:57

Shift closed: Alice27 May 2022, 10:59

Cash drawer

Starting cash\$100.00

Cash payments\$17.64

Cash refunds\$0.00

Paid in\$1.23

Paid out\$4.53

Expected cash amount\$114.34

Actual cash amount\$34.44

Difference-\$79.90

Sales summary

Gross sales\$14.70

Refunds\$0.00

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

15

Shifts

<

1 Jan 2021 - 20 Jun 2022

>

All stores

Shifts summary

Pay ins and payouts

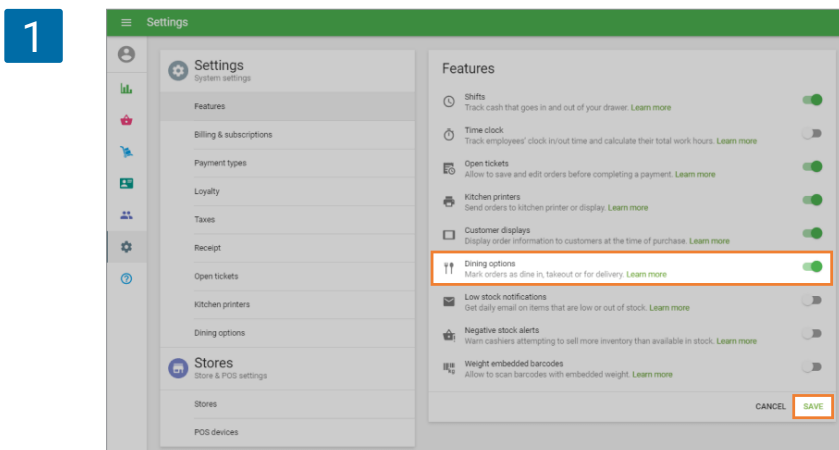
	Opening time
POS 1	27 May 2022, 10:59
POS 1	27 May 2022, 10:57

## 2.19 Dining Options

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

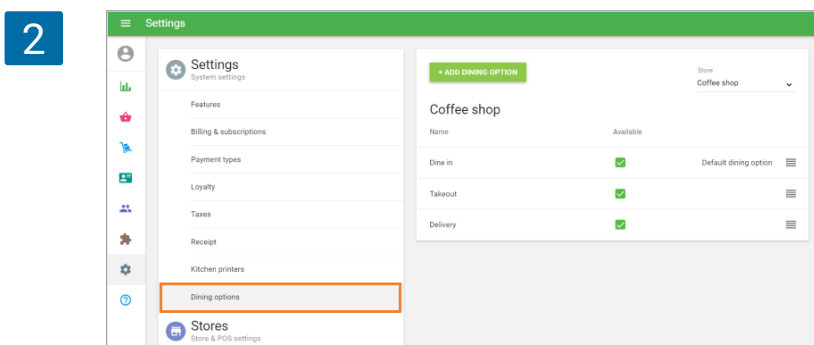
### 2.19.1 Configuration of Dining Options

Login to the [Back office](#), navigate to the Settings menu, Features section, and switch the 'Dining options' slider on.

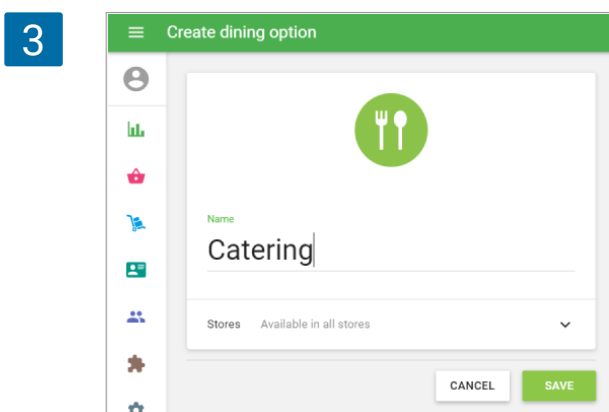


Don't forget to save changes.

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'.

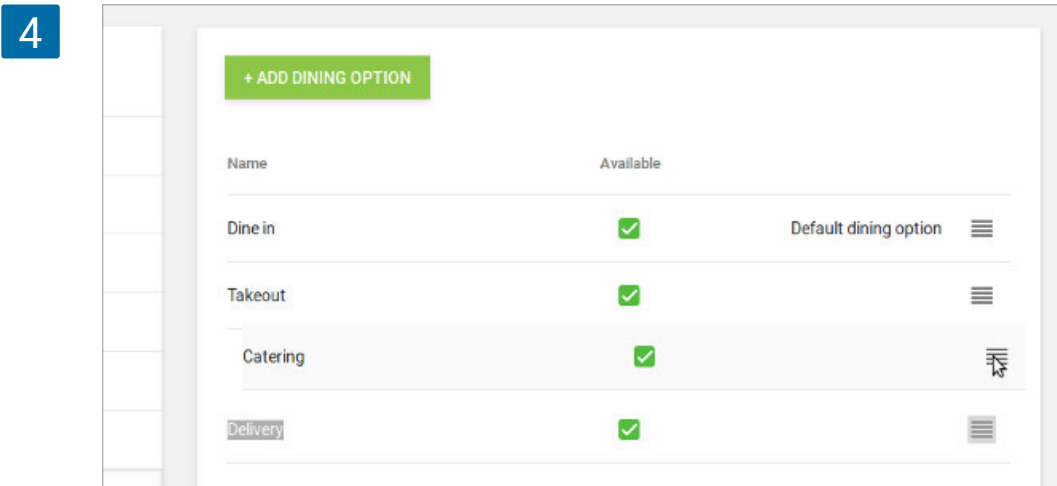


You can edit these options by clicking on them or create new by clicking on 'Add dining option' button.

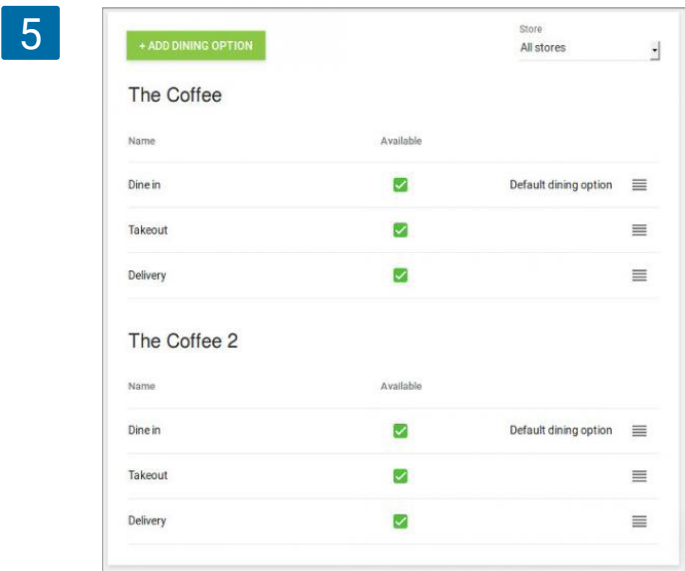


Don't forget to save changes.

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

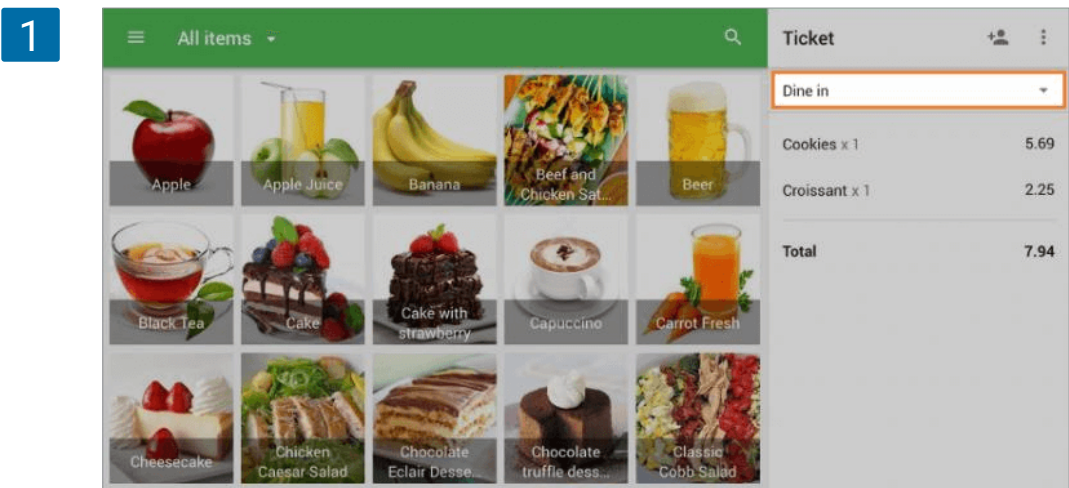


If you have multiple stores, you can manage the dining options for each store.

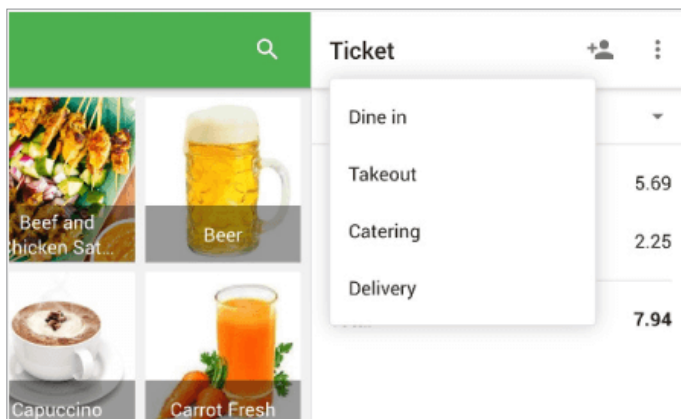


## 2.19.2 Using Dining Options during Sale

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



2

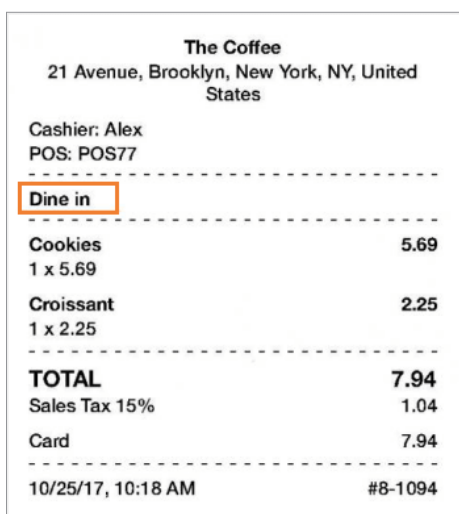


If you tap on this line, you can see the drop-down menu with all dining options. Choose needed one.

Dining options will be shown on the printed receipt.

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

3



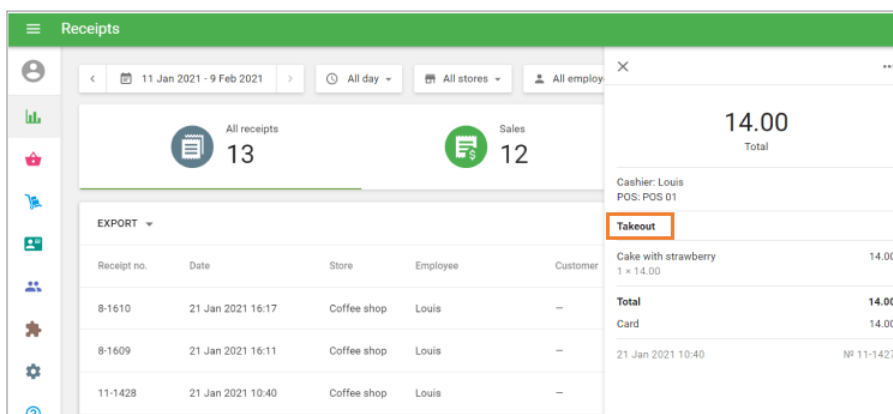
4



As well as at the bill if you print one.

You can see dining option line in the receipts information at the [Back Office](#) or Loyverse POS app.

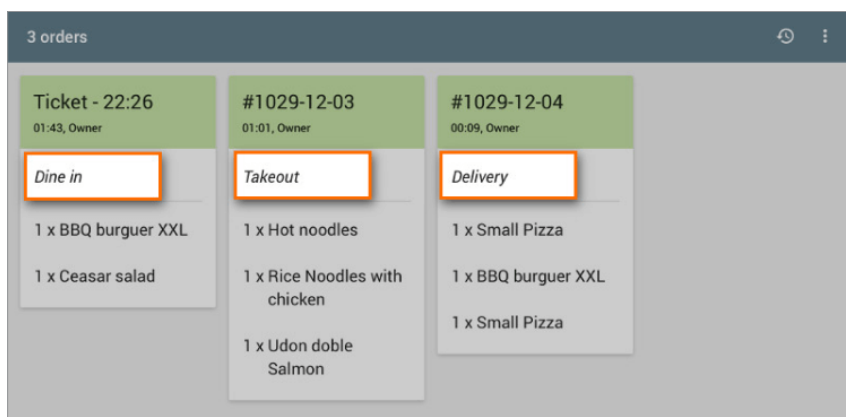
5





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

6



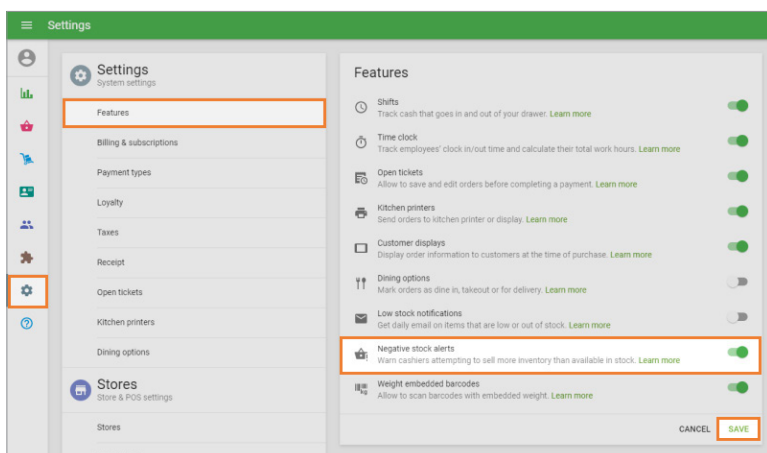
## 2.20 Negative Stock Alerts

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.

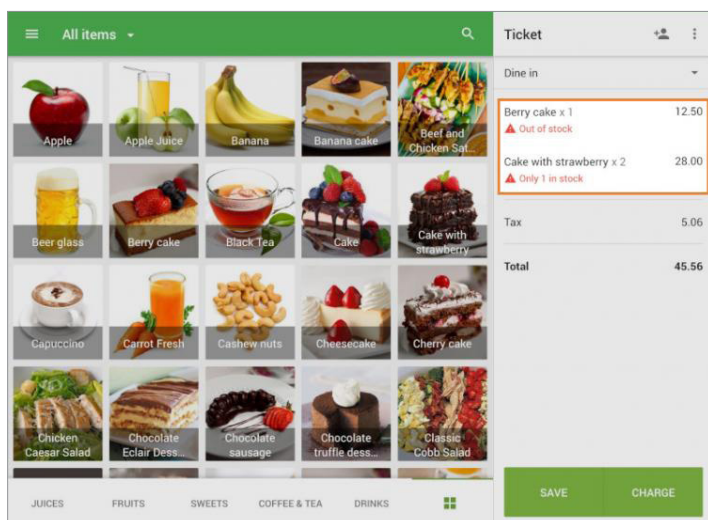
1



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

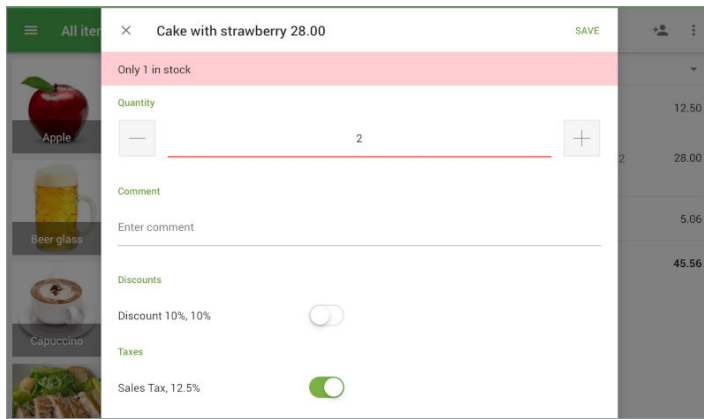
Click the 'Save' button.

2



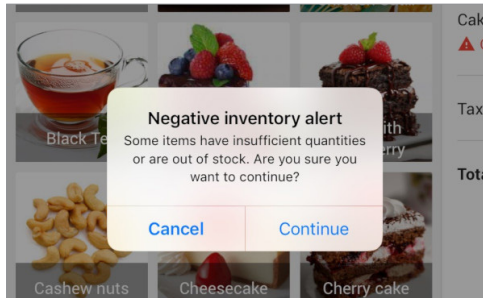
With this feature enabled, the system will show an alert about insufficient stock when the quantity of an item in the ticket is more than the current quantity in stock. Also, the system will show you the quantity that is available for sale if the stock of this item is more than 0. Alerts work for composite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

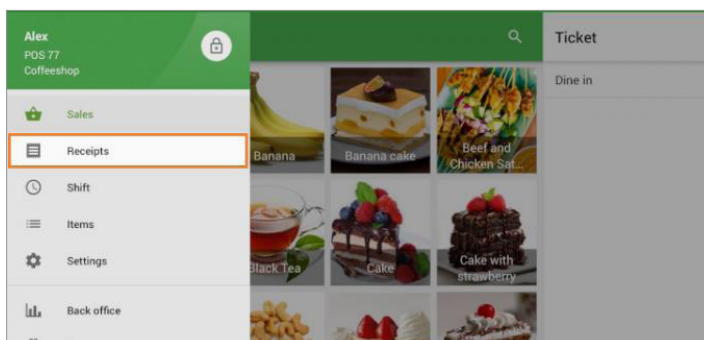
The cashier can still proceed to sell an item by tapping 'Continue'.

### Note

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

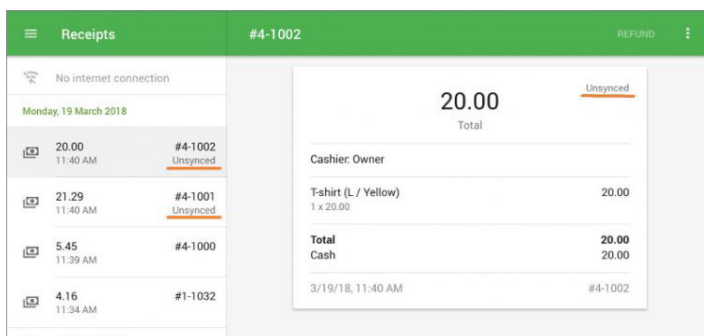
## 2.21 Receipts List in the POS

1



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

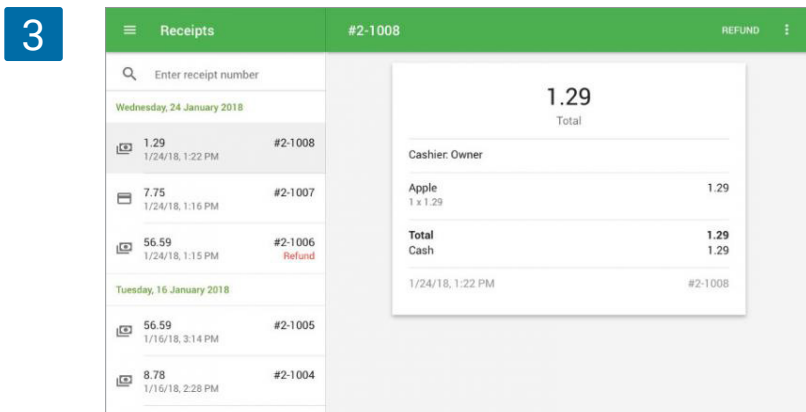
2



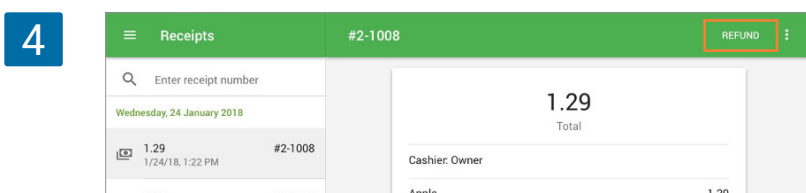
The receipts from all POS of the same store will be displayed in the list. If you want to refresh the receipts list, just swipe it down. Non-synchronized receipts (that are made during the time when there was no Internet connection) will say 'Unsynced'.

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.

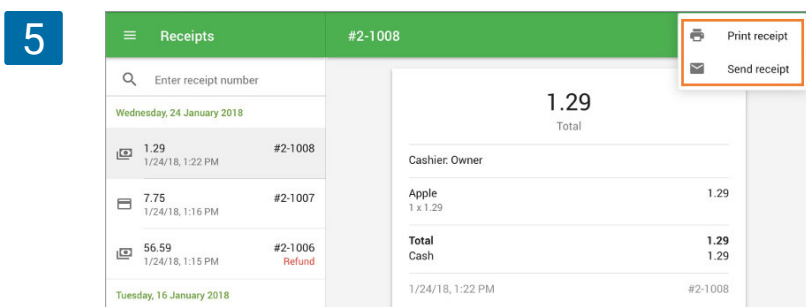
Tap on the receipt in the list to see its details.



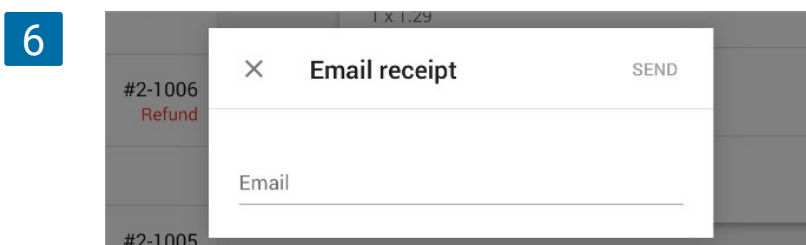
To make a refund, tap the 'Refund' button.



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.



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



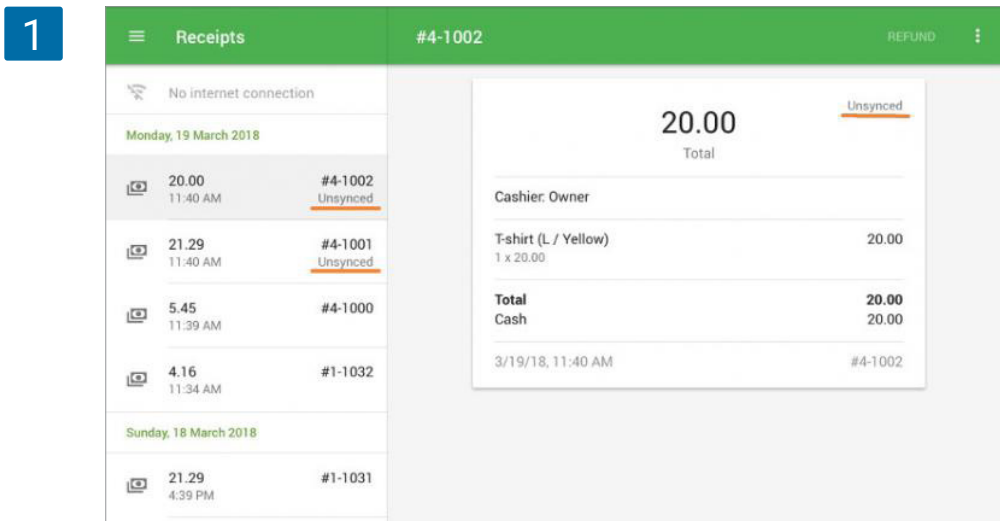
### Note

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.

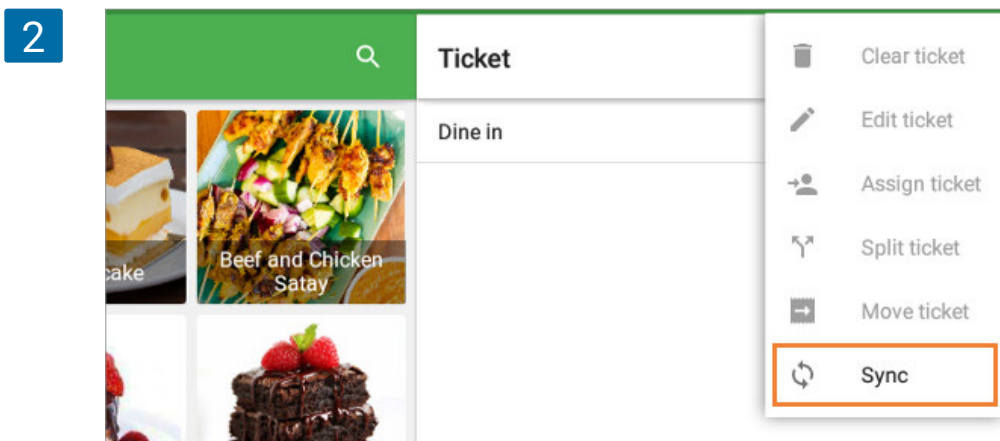
When you make sales in offline mode, all of your receipts are stored locally in the device memory. If you go to the Receipt section you will see the [receipts list](#). The receipts that were made in offline mode are marked as "Unsynced."



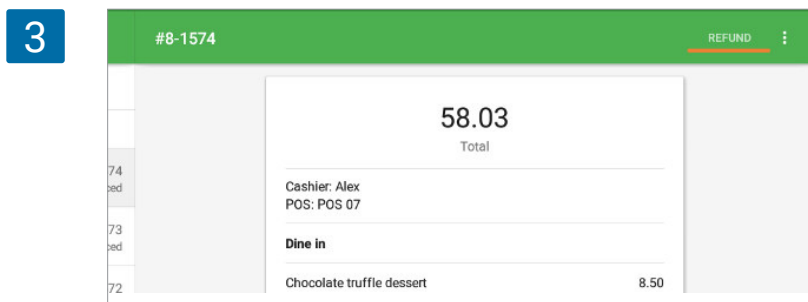
### Note

- 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.



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



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

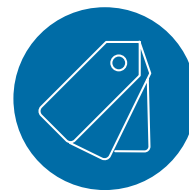
The [open tickets](#) work in offline mode but without [synchronization with other devices](#). Email receipts are sent to customers only after the connection to the Internet is restored.

#### 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.

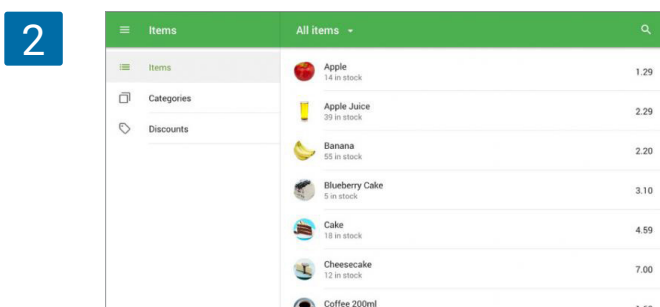
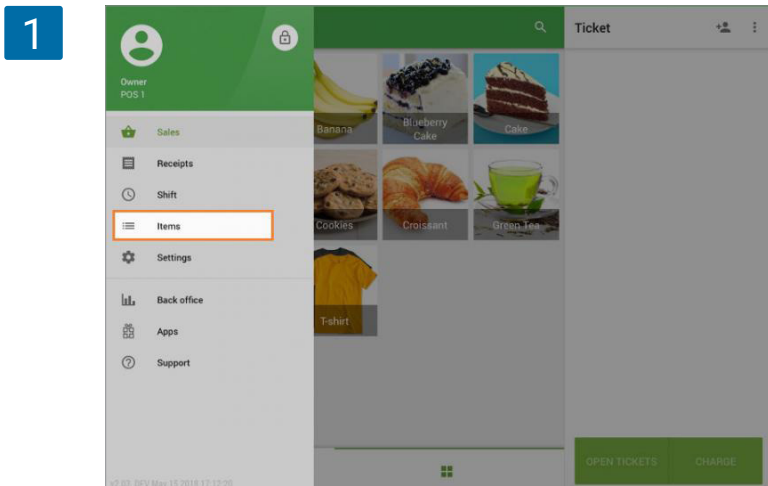


# 3. Items



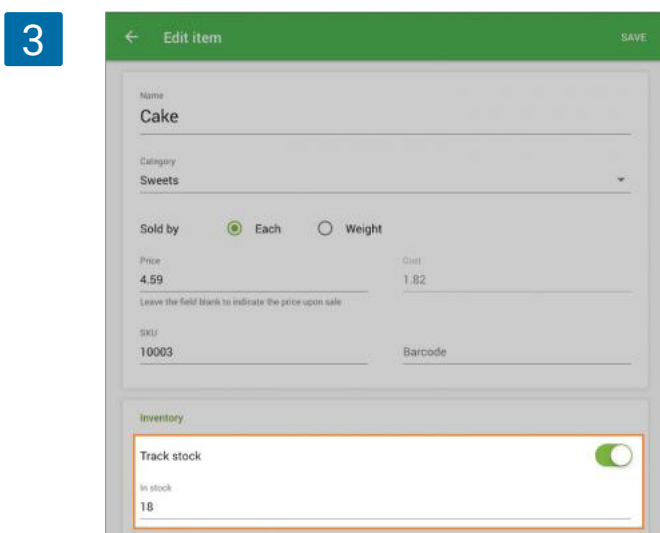
## 3.1 Working with the Items List in the POS

Go to the 'Items' section of the menu.



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.



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

← Edit item

SAVE

Name

T-shirt

Category

No categories

Sold by

☒ Each ☐ Weight

Inventory

Track stock

☒

Variants

Variant	Price	Cost	In stock	SKU	Barcode
S / White	20.00	10.00	19	10010	45840001
S / Black	20.00	10.00	5	10020	45840002
S / Red	20.00	10.00	8	10021	45840003
S / Yellow	20.00	10.00	16	10022	45840004
M / White	20.00	10.00	8	10023	45840005

SHOW ALL VARIANTS

Representation on POS










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

5

Items

All items

🔍

Items	 Apple	1.29
Categories	 Apple Juice	2.29
Discounts	 Banana	2.20
	 Blueberry Cake	3.10
	 Cake	4.59
	 Cheesecake	7.00
	 Coffee 200ml	1.60
	 Cookies	5.69
	 Croissant	

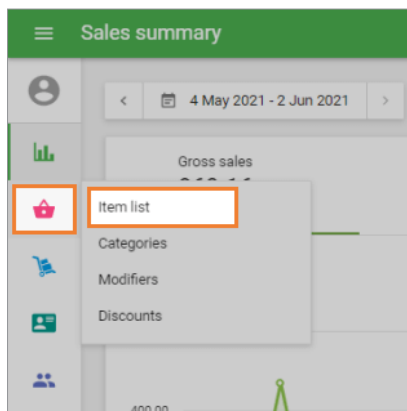


## 3.2 How to Add Barcodes to Items

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

### 3.2.1 How to add item barcode in the Back Office

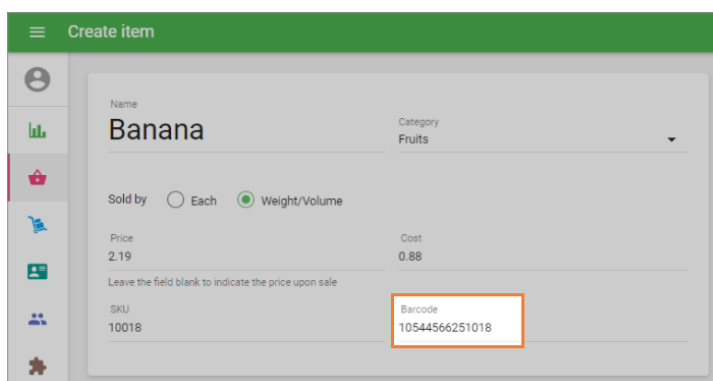
1



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

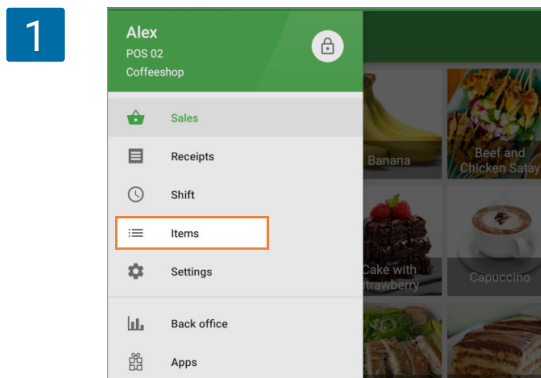
Before scanning the barcode by scanner, make sure to activate the Barcode field by clicking on it.

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

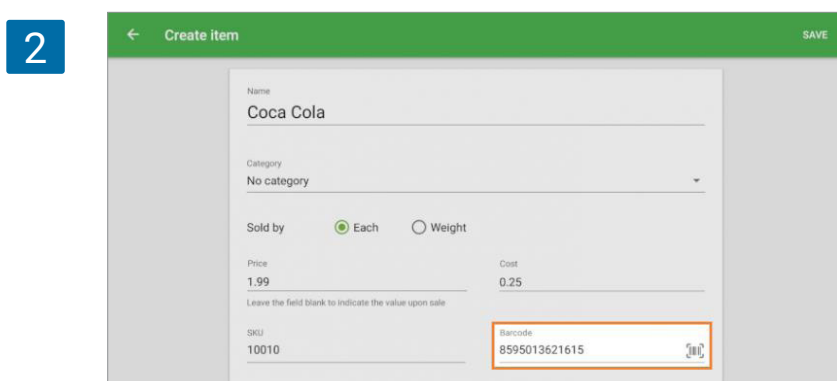
	A	B	C	D	E	F	G	H	I	
1	SKU	Name	Category	Cost	Price	Available for sale	Sold by weight	Barcode	SKU of included item	Quantity of
2	1001	Apple Juice	Juice	1.44	2.29	Y	N	10544566251001		
3	1018	Banana	Fruits	0.88	2.19	Y	N	10544566251018		
4	1014	Black Tea	Hot Drinks	1.24	2.39	Y	N	10544566251014		
5	1019	Cake	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	0.96	2.39	Y	N	10544566251013		

## 3.2.2 How to add barcodes using Loyverse POS app



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.

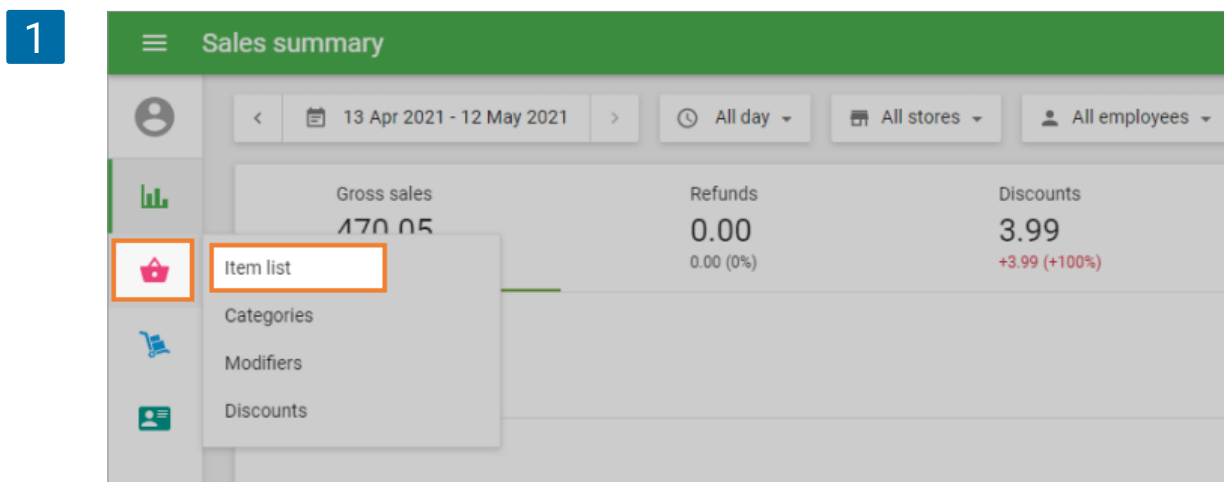


## 3.3 How to Use Variants of Items

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.



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.

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Create item

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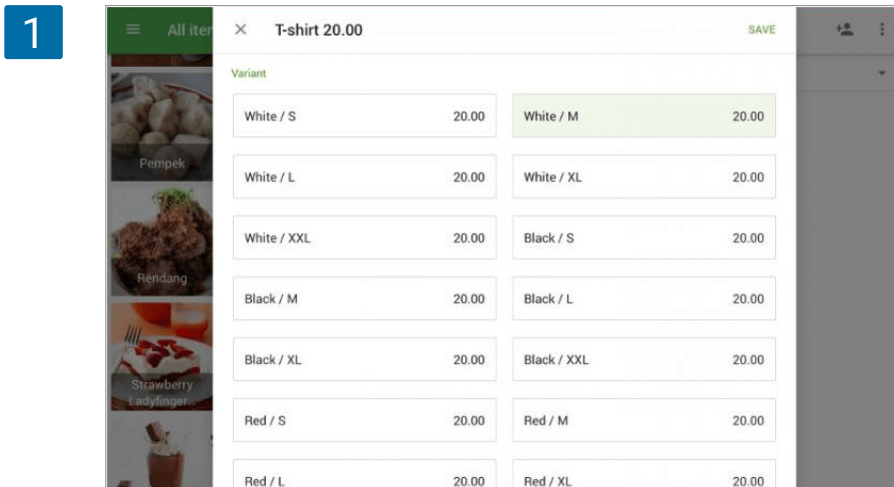
1426

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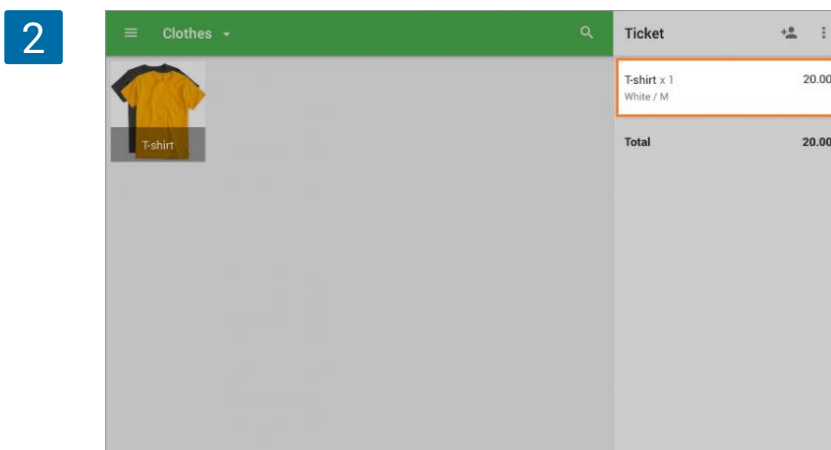
1428</

### 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”.

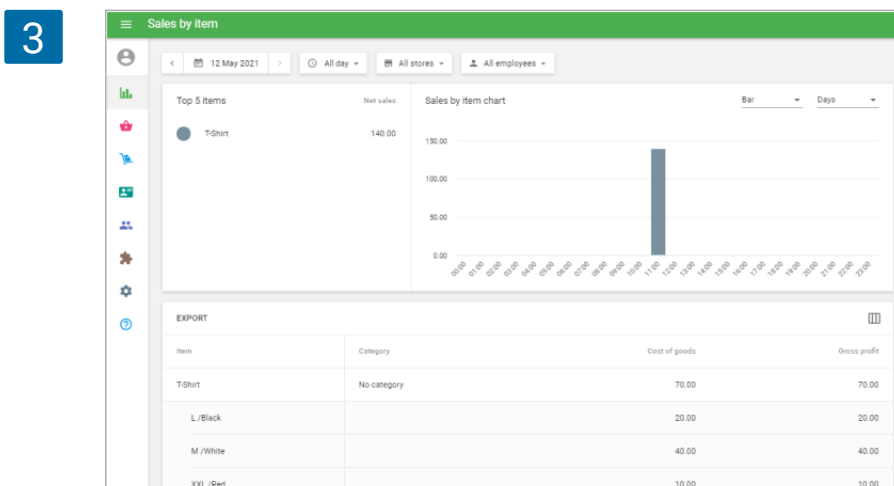


An item with the selected variant will appear on the ticket.



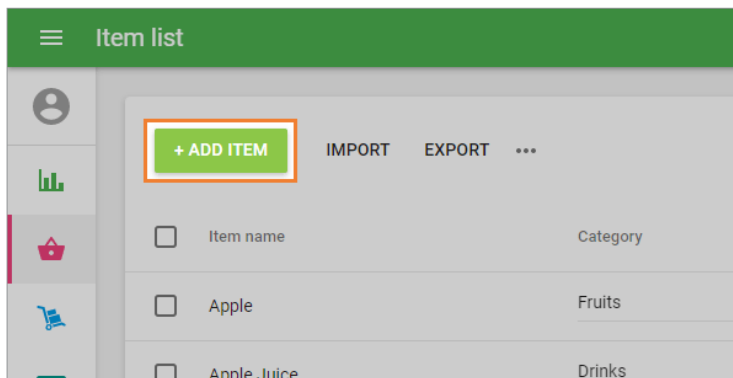
Then carry out the same steps as you would normally.

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





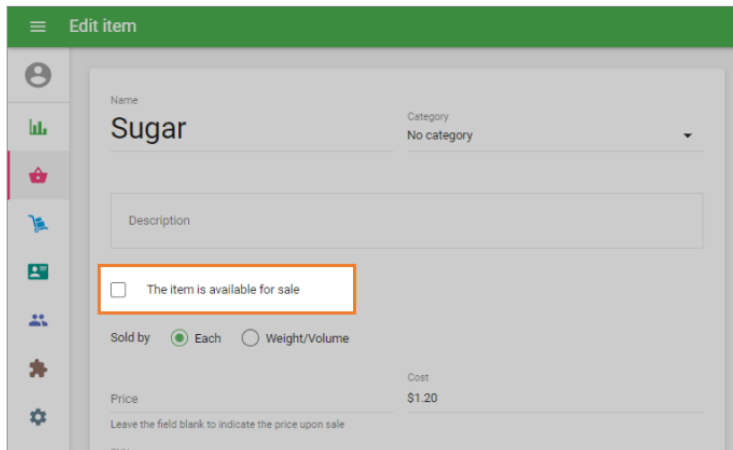
2



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.

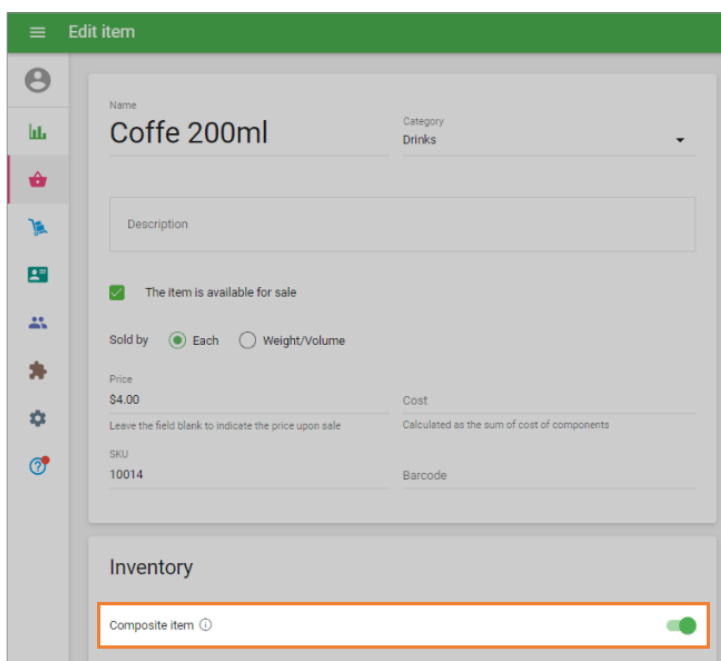
Fill in the cost field and save the component item.

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 screenshot shows the 'Edit item' interface. At the top, there's a green header with a menu icon and the text 'Edit item'. Below this, there's a section for 'SKU' (10014) and 'Barcode'. The main section is titled 'Inventory' and includes a 'VIEW HISTORY' link. There are two toggle switches: 'Composite item' (turned on) and 'Use production' (turned off). Below these is a table with columns 'Component', 'Quantity', and 'Cost'. The first row shows 'Instant Coffee' (SKU 10013) with a quantity of 0.020 and a cost of 0.14. A search dropdown is open, showing suggestions: 'Milk' (SKU 1010), 'Mira goreng' (SKU 10026), and 'Pizza(Composite)' (SKU 10092).

Specify the quantity field for each component's item.

**6**

The screenshot shows the 'Inventory' section. The 'Component' table has two rows: 'Instant Coffee' (SKU 10013) with a quantity of 0.020 and a cost of \$0.07, and 'Milk' (SKU 10039) with a quantity field highlighted by an orange box. The 'Quantity' field for 'Instant Coffee' is also highlighted by an orange box.

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

**7**

The screenshot shows the 'Total cost' field highlighted by an orange box, displaying a value of 0.42. The background is dimmed, showing the 'Sugar' (SKU 10089) component with a quantity of 0.020 and a cost of 0.02.

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

Don't forget to save your composite item.

#### Note

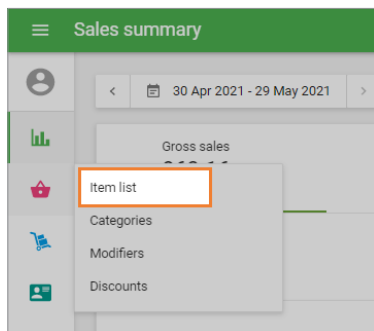
The maximum nesting level for composite items is 3. If an item already has a third nesting level, then it is not displayed in the drop-down list when searching for components.



## 3.5 Notification About Low Stock

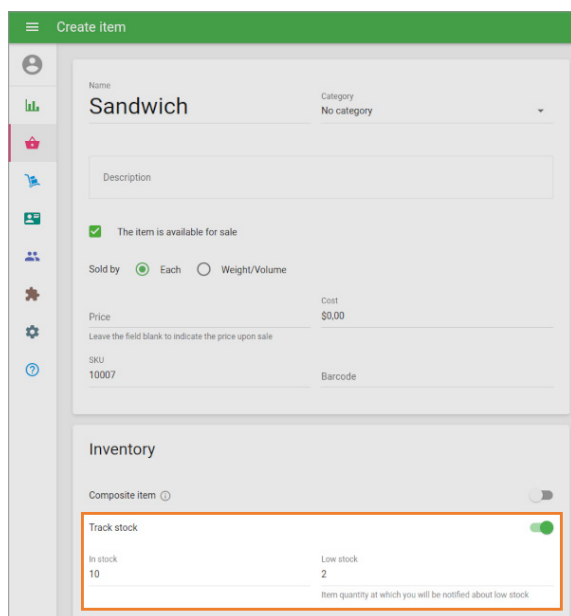
Do you want to keep track of products with low stock directly from your back office? And even better – to receive an email notification that the stocks of a product are coming to an end? Loyverse POS gives you such opportunity. Also, activation and the setting up of this function will take no time at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

1



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

2



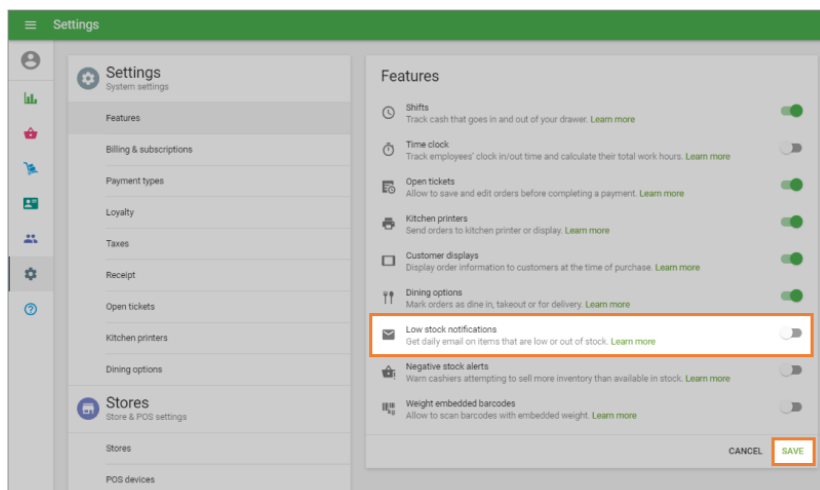
Open the necessary item to edit. Activate the option 'Track inventory', if it has not yet been activated. Under 'In stock', specify the item quantity that you have at the moment. In the field 'Low stock' enter the quantity at which you would like to be notified about the low stock.

### 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

Item name	Category	Price	Cost	Margin	In stock
Apple	Fruits	3.00	1.57	47.67%	138
Apple Juice	Drinks	4.99	2.71	45.69%	41
Banana	Fruits	Variable	1.57	—	11
Banana cake	Desserts	2.00	2.00	0%	33
Beef and Chicken Satay	Meals	Variable	9.01	—	39
Berry cake	Desserts	Variable	0.00	—	3 <b>Low stock (1)</b>
Black Tea	Hot Drinks	Variable	0.25	—	—
Caesar Salad	Salads	22.00	5.30	75.91%	—

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	
Item	Track inventory	Available for sale [The Coffee]	Price [The Coffee]	In stock [The Coffee]	Low stock [The Coffee]	"Mod
	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

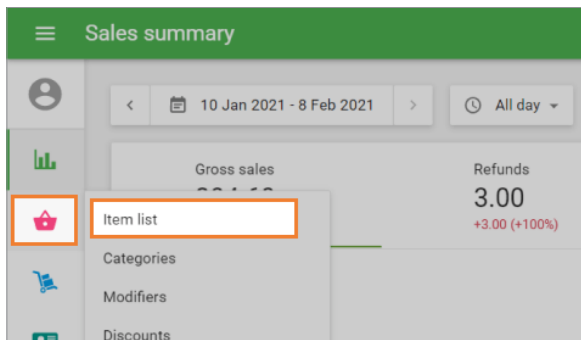
After editing file import it back to the system.

## 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

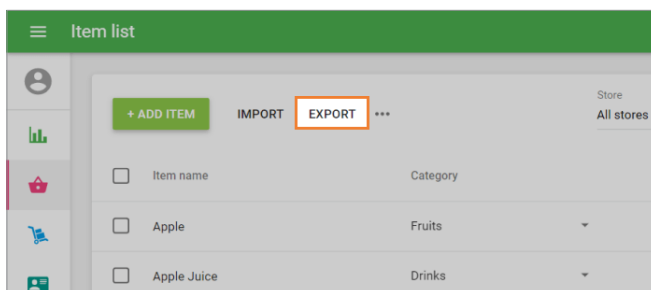


Let's start by adding a few sample items in the Back Office. Open 'Item list'.

[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	N
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	Store
2	apple juice	1001	Apple Juice	Drinks	N							1.44	10544566251001	All stores
3	banana	1018	Banana	Fruits	N							12.12	10544566251012	All stores
4	beef and chicken satay	10021	Beef and Chicken Satay	Meats	N							9		All stores
5	beer	10018	Beer	Drinks	Y							5		All stores
6	beer-glass	10019	Beer glass	Drinks	Y							3.5		All stores
7	beer-glass-0.5-l	10010	Beer glass 0.5 L	Drinks	N								SDA-sku-3456	All stores
8	black-tea	1014	Black Tea	Hot Drinks	N								10544566251014	All stores
9														
10	cake	1019	Cake	Sweets	N							1.61	10544566251019	All stores
11	cap	10054	Cap	Clothes	N	Color	Black	Size	Big	Fabric	Cotton	5		All stores
12	cap	10055					Black		Big		Silk	5		All stores
13	cap	10056					Black		Small		Cotton	5		All stores
14	cap	10057					Black		Small		Silk	5		All stores
15	cap	10058					White		Big		Cotton	5		All stores
16	cap	10059					White		Big		Silk	5		All stores
17	cap	10060					White		Small		Cotton	5		All stores
18	cap	10061					White		Small		Silk	5		All stores
19	cashew-nuts	10000	Cashew Nuts	Hot Drinks	N							1	7622210206772	All stores
20	carrot-fresh	1002	Carrot Fresh	Juice	N							0	10544566251002	All stores
21	cashew-nuts	10009	Cashew Nuts	Fruits	Y							0		All stores
22	cheesecake	10015	Cheesecake	Sweets	N							4.29		All stores
23	chicken-caesar-salad	10008	Chicken Caesar Salad	Salads	N							5.3		All stores
24	classic-cobb-salad	10006	Classic Cobb Salad	Salads	N							4.12		All stores
25	coffee	10014	Coffee	Drinks	N							2		All stores
26	coffee 200ml	10016	Coffee 200ml	Drinks	N									All stores
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 name
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
1	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]
2	Y	N	2.29	21	2	N	2.29	10	2
3	Y	Y	2.19	67	4	Y	2.19	15	4
4	Y	Y	12.03	48	4	Y	12.03	17	4
5	N	Y	5.3			Y	5.3		
6	Y	Y	8	8	5	Y	8	16	5
7	Y	N	15	12	0	N	15	14	0
8	Y	Y	7	57	5	Y	7	65	5
9	Y	Y	14	14		Y	14	55	
10	N	Y	7.59			Y	7.59		
11	N	Y	4			Y	4		
12	0.02	Y	2			Y	2		

## Items with variants

3

A	B	C	D	E	F	G	H	I	J	K	L
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
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

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O		P	Q	R
1	Handle	SKU	Name	Category	Sold	Opti	Opti	Opti	Opti	Opti	Opti	Cost	Barcode	SKU of included item	Quantity of included item	Track stock	Avail		
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							0.75	10544566251021				Y	Y	
6	croissant	1011	Croissant	Sweets	N							1.4	10544566251011				Y	Y	
7	dadiah	10036	Dadiah	Drinks	N							0	3245675991148				N	Y	
8	fancy-cake	1020	Fancy Cake	Sweets	N							2	10544566251020				Y	Y	

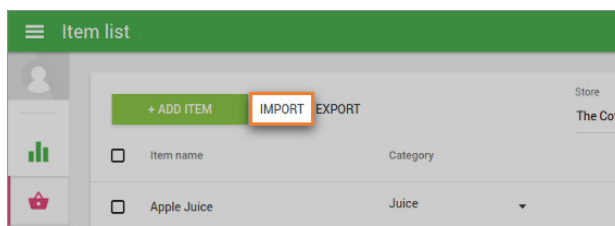
Each [composite item](#) includes several components. Specify SKU codes of all the included items (components) of the selected composite item in the field 'SKU of included item' on a separate row.

'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.

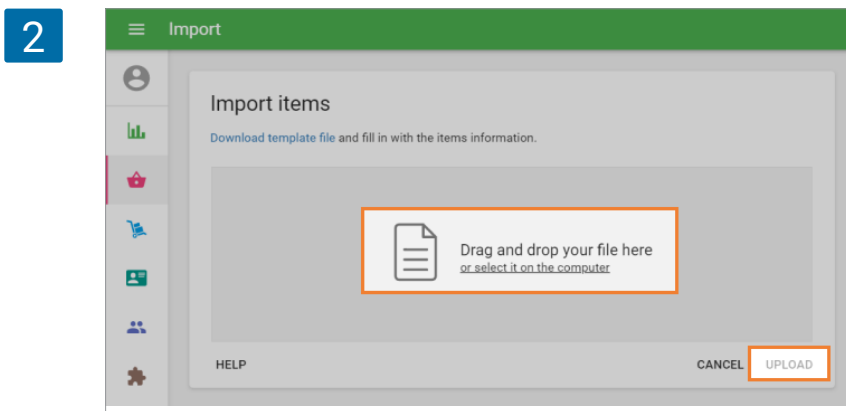
## 3.6.2 Import of items

1



Click on the 'Import' button.

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



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

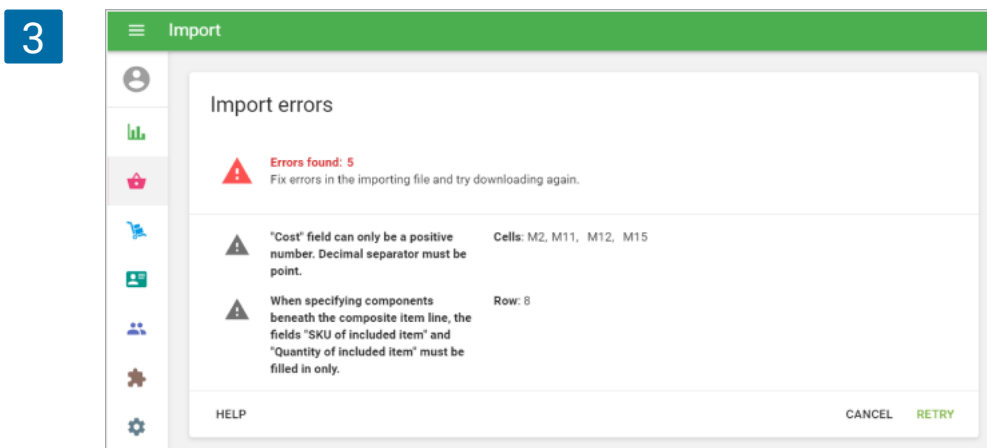
You may be faced with some errors when uploading the completed file. An error message will appear if:

- 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.



### 3.6.3 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.

#### **Default price**

This is the default price that is assigned to all stores. But then it can be changed for some stores if some stores have a different price.

If you have the same price in all stores - you can only fill in the Default price column in the CSV file - after import, the same price will automatically be in all stores. And if prices are different in stores, then you need to specify in the CSV file the price for each store.

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'.

### **Use production**

Here, it's only necessary to specify one character: 'Y' (Yes) – if the composite item has a production option on, or 'N' (No) – if it is off. Note, that production can be applied only for composite items and only when using the functionality of Advanced inventory.

### **Supplier**

The primary supplier name for Purchase Orders in case of using the functionality of Advanced inventory.

### **Purchase cost**

The cost of items that will be used by default in case of autofilling purchase orders in case of using the functionality of Advanced inventory.

### **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



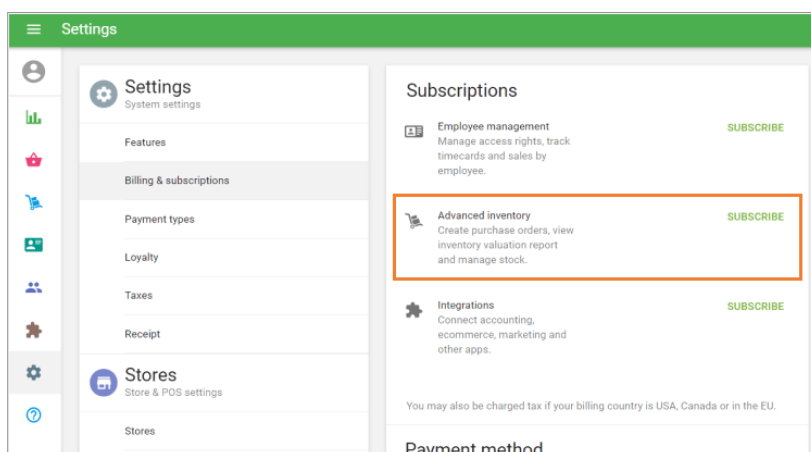
## 4.1 What is Advanced Inventory Management

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.

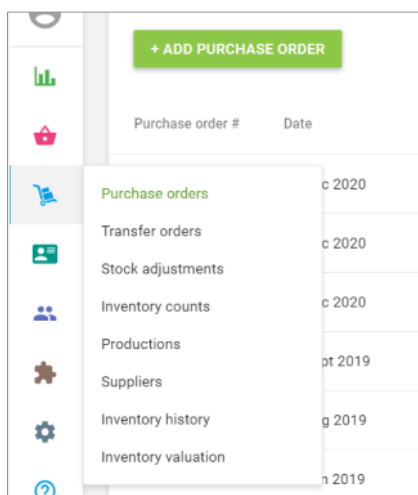
The '[Advanced inventory management](#)' is only available in the paid subscription.

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

1



2



After activation, 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

The screenshot shows the 'Item 1' form in a system. The 'Inventory' section is highlighted with an orange border. It contains the following fields and controls:

- Composite item**: A toggle switch set to 'Off'.
- Track stock**: A toggle switch set to 'On' (green).
- In stock**: A text input field containing '10'.
- Low stock**: A text input field containing '2'.
- Item quantity at which you will be notified about low stock**: A text input field.
- Optimal stock**: A text input field containing '5'.
- Use this field to autofill the item quantity in the purchase order**: A text input field.
- Primary supplier**: A text input field containing 'Dlut'.
- Default purchase cost**: A text input field containing '\$7.00'.

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

4

The screenshot shows the 'Item 1' form after saving changes. The 'Average cost' field is highlighted with an orange border. It contains the following fields and controls:

- Average cost**: A text input field containing '\$0.00'.
- Value updates automatically when you receive inventory**: A text input field.

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.

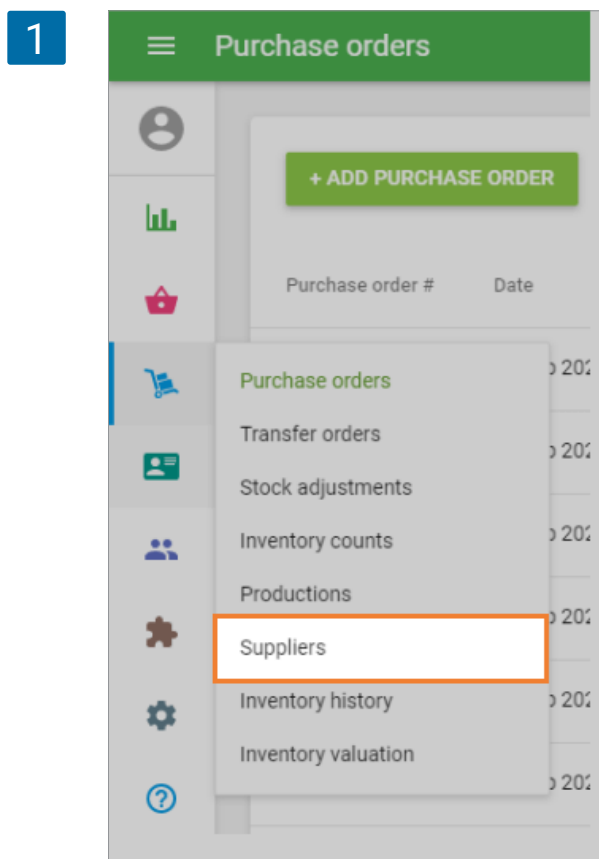
## 4.2 How to Work with Purchase Orders and Suppliers

---

'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.

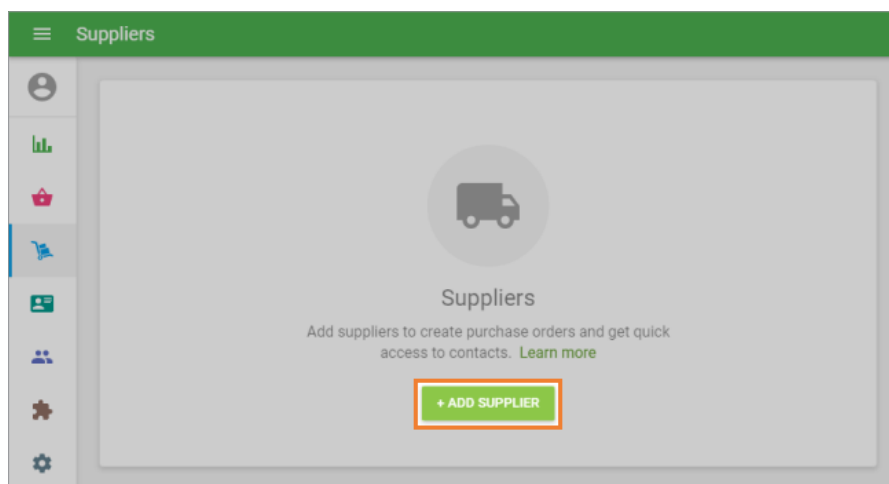
### 4.2.1 Suppliers

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



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

2



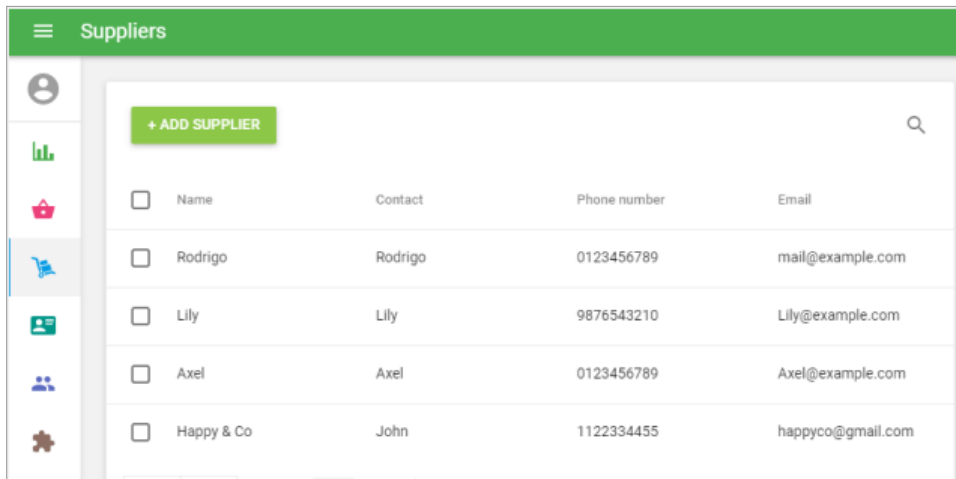
In the 'Create supplier' form, 'Supplier's name' is a required field and should be unique. The other fields are optional and can be left blank, but remember, that this information will be used to create the Purchase Order in the next step.

3

A screenshot of the 'Edit supplier' form in the same application. The header bar is green with a hamburger menu icon and the text 'Edit supplier'. The sidebar is identical to the previous screenshot. The main form area has a light gray background and a blue circular truck icon at the top. Below the icon, the form fields are as follows: 'Supplier name' (labeled in green) with the value 'Rodrigo'; 'Contact' with the value 'Rodrigo'; 'Email' with the value 'mail@example.com'; 'Phone' with the value '0123456789'; 'Website' with the value 'www.example.com'; 'Address 1' (empty); 'Address 2' (empty); 'City' and 'Postal/zip code' (both empty); 'Country' with a dropdown menu showing 'Spain'; 'Region/State/Province' (empty); and 'Note' (empty). At the bottom of the form, there are two buttons: 'CANCEL' and 'SAVE', with the 'SAVE' button highlighted by an orange rectangular border.

Don't forget to save supplier.

4



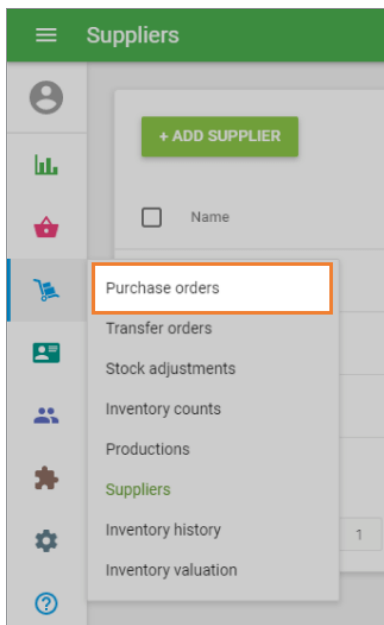
<input type="checkbox"/>	Name	Contact	Phone number	Email
<input type="checkbox"/>	Rodrigo	Rodrigo	0123456789	mail@example.com
<input type="checkbox"/>	Lily	Lily	9876543210	Lily@example.com
<input type="checkbox"/>	Axel	Axel	0123456789	Axel@example.com
<input type="checkbox"/>	Happy & Co	John	1122334455	happyco@gmail.com

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

## 4.2.2 Making purchase orders

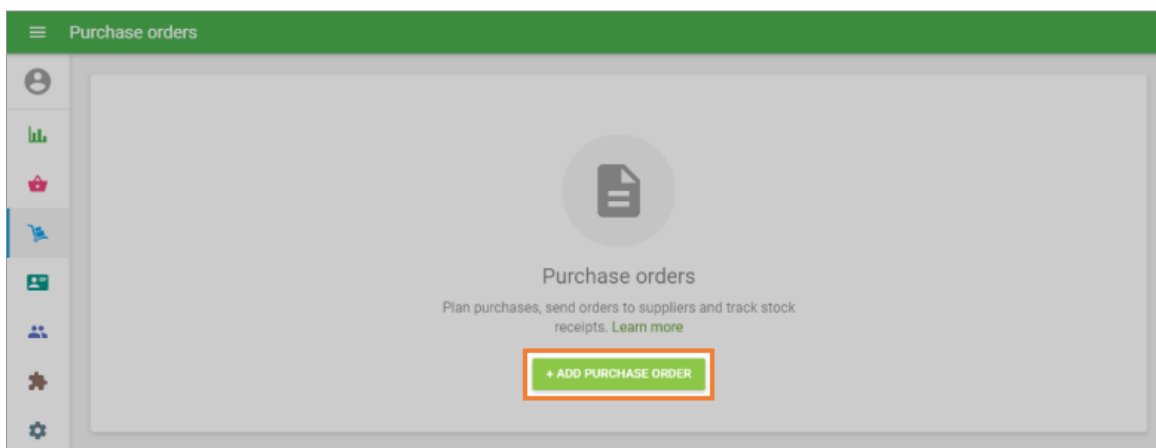
Go to 'Purchase orders' section in the 'Inventory management' menu.

1



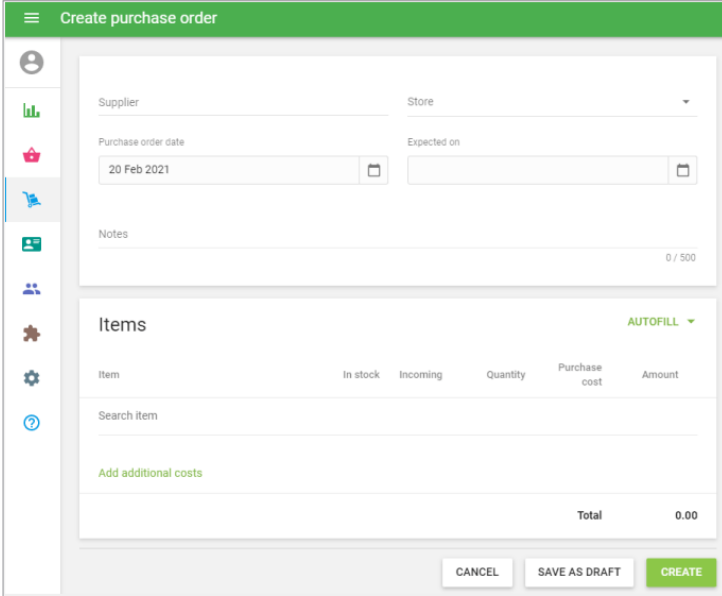
To create an order, click on '+ Add purchase order' button.

2



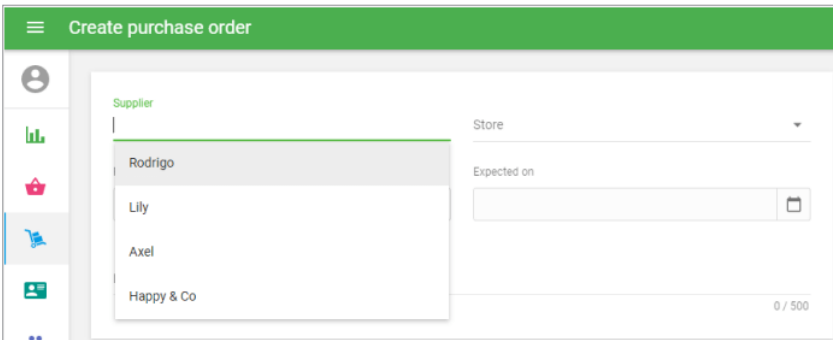
The form 'Create purchase order' will open for editing.

3



Choose the supplier from the 'Supplier' drop-down list.

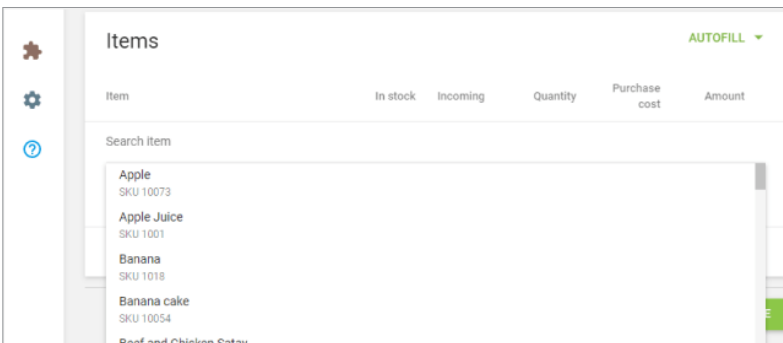
4



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

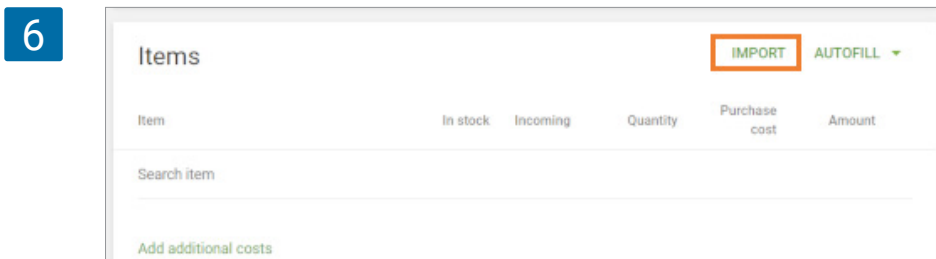


Fill in the 'Quantity' and the 'Default purchase cost'.

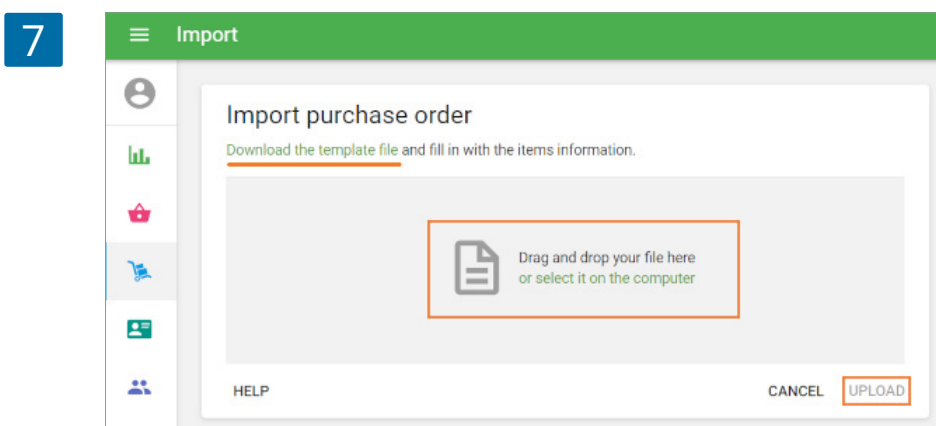
You can add more items to the order in the same way as above.

The 'Incoming' fields indicate the expected quantity of items to be received based on all existing purchase orders but have not yet been received.

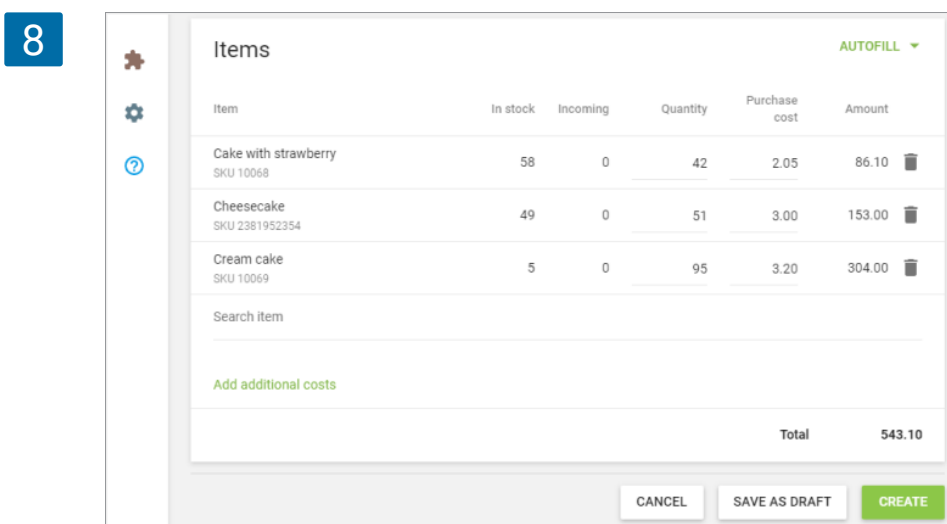
You can also import the items to the purchase order. For this, click on the Import button.



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'.



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



Now your purchase order has been created.

9

**Purchase order details**

< Purchase orders RECEIVE EDIT SEND MORE ▾

**PO1040**  
Pending  
Received 0 of 188

Date: 09 Apr 2021  
Ordered by: Louis

Supplier:  
Rodrigo  
Rodrigo  
0123456789  
mail@example.com

Destination store:  
Coffee shop  
21 Avenue, Brooklyn, New York, NY, United States

**Items**

Item	Quantity	Purchase cost	Amount
Cake with strawberry SKU 10068	42	2.05	86.10
Cheesecake SKU 2381952354	51	3.00	153.00
Cream cake SKU 10069	95	3.20	304.00
<b>Total</b>			<b>543.10</b>

### 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

**Send purchase order by email**

From  
lvdemo@loyverse.com

To  
mail@example.com

Cc

Subject  
Purchase order from First Store (PO1040)

Message  
Attachment  
PO1040

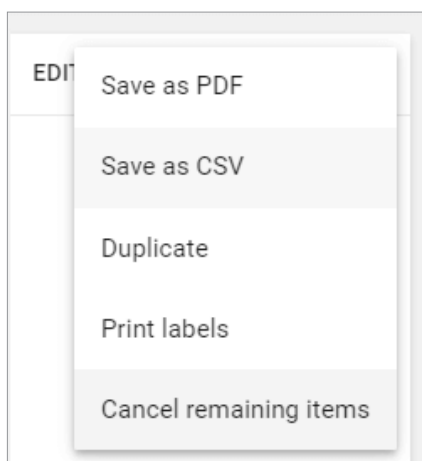
CANCEL SEND



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.

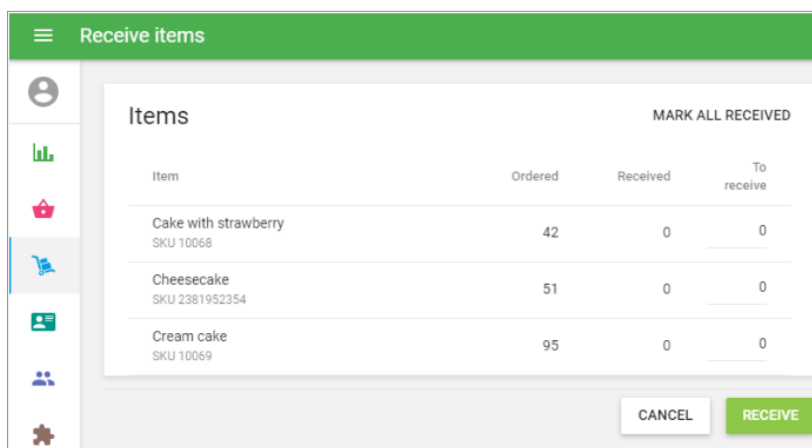
2



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.

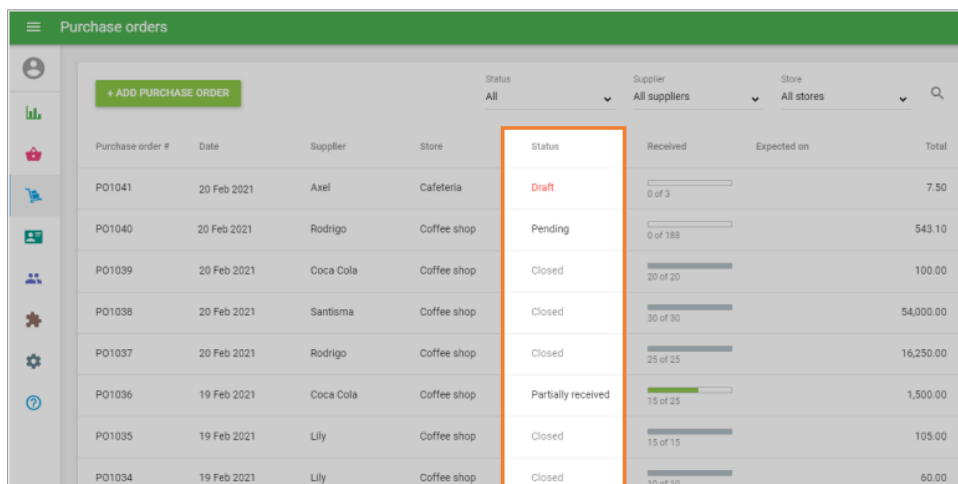
3



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

Available	Store	Price	In stock	Low stock	Optimal stock
<input checked="" type="checkbox"/>	Store 2		0		
<input checked="" type="checkbox"/>	The Coffee		0		

Open for editing the existing purchase order or create new.

2

Create purchase order

Supplier: Happy & Co

Store: [dropdown]

Purchase order date: 14 Jun 2021

Expected on: [calendar icon]

Notes: 0 / 500

Items

**AUTOFILL** [dropdown arrow]

Item	In stock	Incoming	Quantity	Purchase cost	Amount
Search item					
Add additional costs					
Total					0.00

CANCEL SAVE AS DRAFT CREATE

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

All items from supplier

Low stock items from supplier

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.

Items AUTOFILL ▾

Item	In stock	Incoming	Quantity	Purchase cost	Amount
1test SKU 10047	3	0	2	10.00	20.00

Search item

[Add additional costs](#)

**Total** 20.00

CANCEL
SAVE AS DRAFT
CREATE

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

**Create purchase order**

Supplier: Happy & Co Store: Store 2

Purchase order date: 11 Jun 2021 Expected on:

Notes: 0 / 500

Item	In stock	Incoming	Quantity	Purchase cost	Amount
Apple SKU 10073	0	0	124.000	0.56	69.44

Search item

[Add additional costs](#)

Total: 69.44

CANCEL SAVE AS DRAFT CREATE

2

Apple SKU 10073 0 0 124.000 0.56 69.44

Search item

Additional cost	Amount
Shipping	8.00
Packaging	3.00

+ ADD ADDITIONAL COST

Total: 80.44

CANCEL SAVE AS DRAFT CREATE

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

**Purchase order details**

< Purchase orders RECEIVE EDIT SEND MORE

PO1043 Pending Received 0 of 124

Date: 11 Jun 2021 Ordered by: Owner

Supplier: Happy & Co John 1122334455 happyco@gmail.com Destination store: Store 2

Item	Quantity	Purchase cost	Amount
Apple SKU 10073	124	0.56	69.44

Additional cost	Amount
Shipping	8.00
Packaging	3.00

Total: 80.44

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

Item	Quantity	Purchase cost	Amount
Apple SKU 10073	124	0.56	69.44
Additional cost			Amount
Shipping			8.00
Packaging <span style="color: red;">Cancelled</span>			<del>3.00</del>
Total			77.44

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 **C<sub>final</sub>**, will be calculated like this:

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

**C1** — purchase cost of the received item

**Costs** — the total amount of the selected additional costs when receiving the purchase order

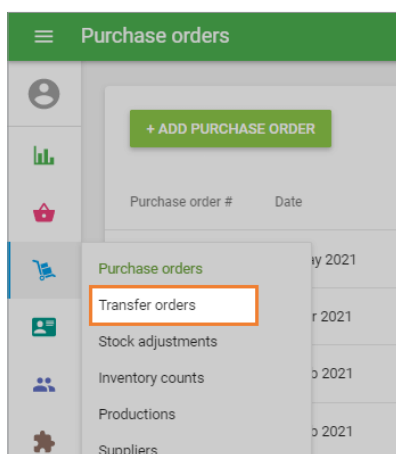
**Subtotal** — the total values of all items received in the order (without additional costs)

## 4.5 How to Work with Transfer Orders

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

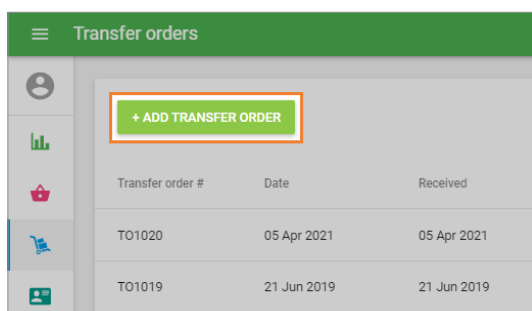
Transfer Orders is a part of the advanced inventory management and is available only to those users who have subscribed to this functionality.

1



Go to 'Transfer Orders' section in the 'Inventory management' menu.

2



To create a transfer, click '+ Add transfer order' button.

The form 'Create transfer order' will open for editing.

3

A screenshot of a software interface showing the 'Create transfer order' form. The sidebar menu is on the left. The main content area has a green header bar with the text 'Create transfer order'. Below the header bar, there is a form with several fields: 'Source store' and 'Destination store' (both dropdown menus), 'Date of transfer order' (a date picker showing 'Jan 4, 2024'), and 'Notes' (a text area). Below these fields, there is a section titled 'Items' with a table. The table has columns 'Item', 'Source stock', 'Destination stock', and 'Quantity'. There is a search bar labeled 'Search item' below the table. At the bottom of the form, there are three buttons: 'CANCEL', 'SAVE AS DRAFT', and 'CREATE'.

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

4

Create transfer order

Source store  
Coffee Shop

Date of transfer order  
Jan 4, 2024

Notes  
0 / 500

Coffee Shop #2  
Coffee Shop  
Coffee Shop #3

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

Items

Item	Source stock	Destination stock	Quantity
Apple Juice SKU 1001	72	0	25
Cheesecake SKU 2381952354	48	0	20

Search item

CANCEL CREATE AND RECEIVE CREATE

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

6

Items

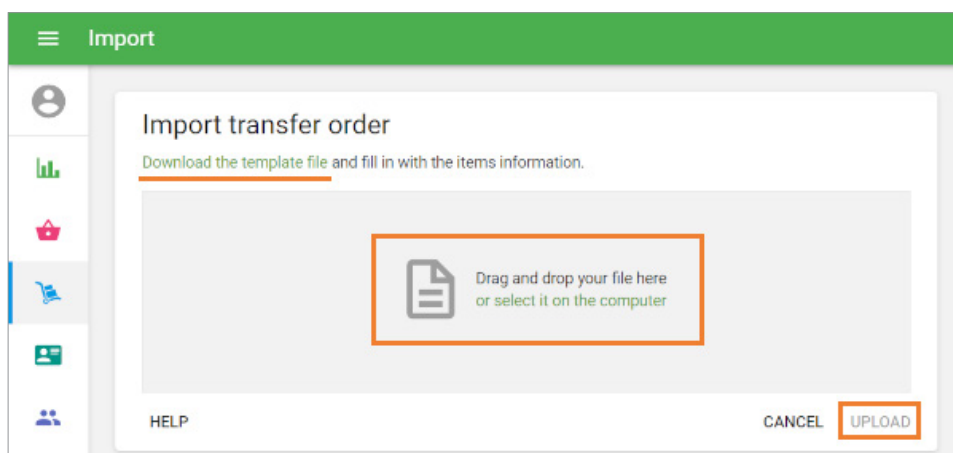
IMPORT

Item	Source stock	Destination stock	Quantity
------	--------------	-------------------	----------

Search item

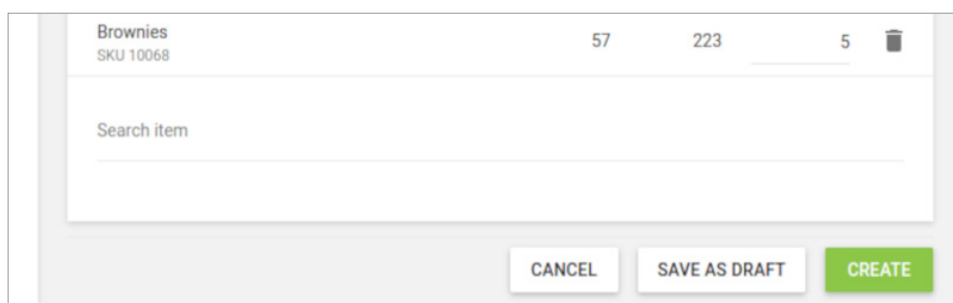
On the Import transfer order page, you can download the template CSV file to your computer. Then, fill it with the item's parameters such as SKU, Item name, Variant name, and Quantity. Parameter SKU or Item name is required. Others are optional. After that, select the CSV file from your computer and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

7



After forming the list of items and its parameters, click on the 'Save as draft' button to make the document without any stock changes, or the 'Create' button to make a transfer order, which reduces only the source stock.

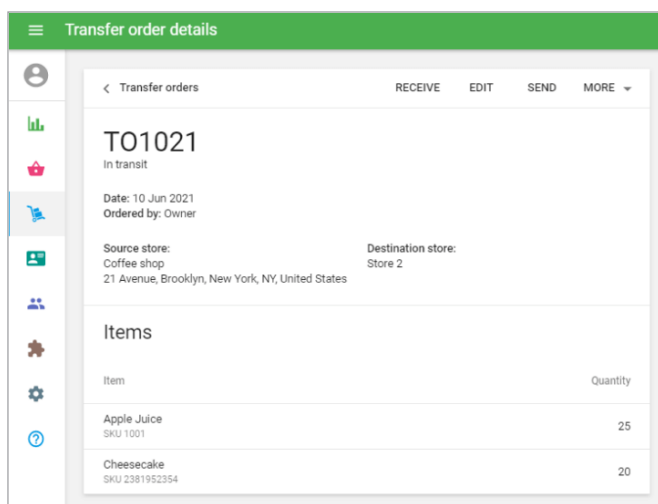
8



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.

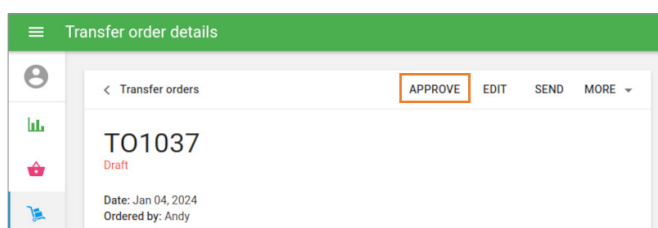
There are additional operations available with the transfer order in the 'More' menu: Save as PDF or CSV file, Duplicate, Print labels.

9



The document with the status 'Draft' can be changed to the 'In transit' status by clicking the 'Approve' button on the 'Transfer order details' page. 'In transit' status means that the stock of transferred items at the source store is reduced, but stock at the destination store is unchanged.

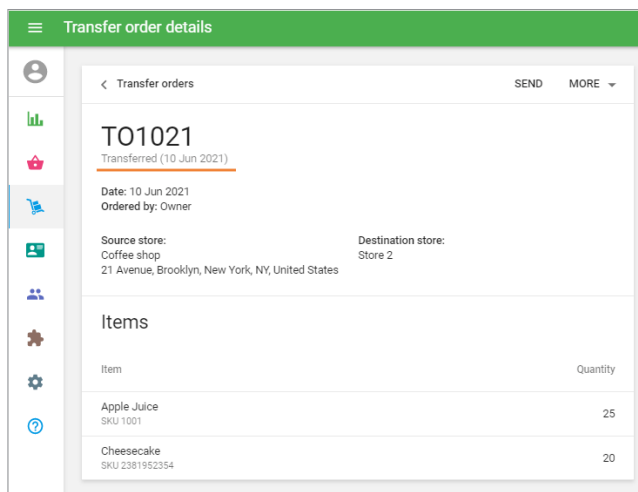
10



To confirm receiving items in the destination store, click on the 'Receive' button at the top. Afterward, 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.



11



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 3 different statuses: 'Draft', 'In transit' - created but not completed, and 'Transferred' - items have been received by the destination store.

12

Transfer order #	Date	Received	Source store	Destination store	Status	Quantity
TO1022	10 Jun 2021	—	Coffee shop	Store 2	In transit	1
TO1021	10 Jun 2021	10 Jun 2021	Coffee shop	Store 2	Transferred	45

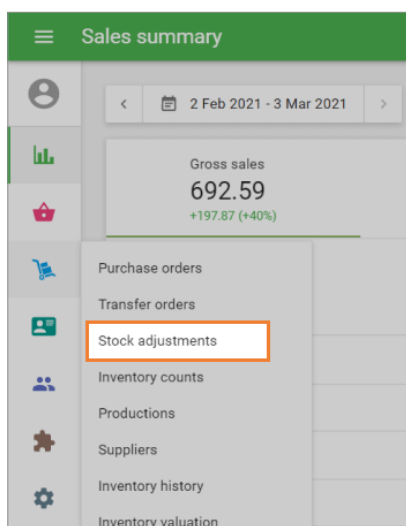
## 4.6 How to Work with Stock Adjustments

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

**Create stock adjustment**

Reason: Inventory count

Notes: 0 / 500

Item	Expected stock	Counted stock
Banana SKU 1018	39	38

Search item

CANCEL ADJUST

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

7

**Create stock adjustment**

Reason: Loss

Notes: 0 / 500

Item	In stock	Remove stock	Stock after
Banana SKU 1018	39	1	38

Search item

CANCEL ADJUST

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

**Stock adjustment details**

< All stock adjustments MORE

**SA1023**

Date: 03 Mar 2021  
Reason: Loss  
Adjusted by: Louis

Store:  
Coffee shop  
21 Avenue, Brooklyn, New York, NY, United States

Item	Remove stock
Banana	1

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

**Stock adjustments**

+ ADD STOCK ADJUSTMENT

Reason: All reasons

Adjustment #	Date	Reason	Quantity
SA1023	03 Mar 2021	Loss	1
SA1022	21 Jun 2019	Inventory count	3
SA1021	07 Jun 2019	Damage	8

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

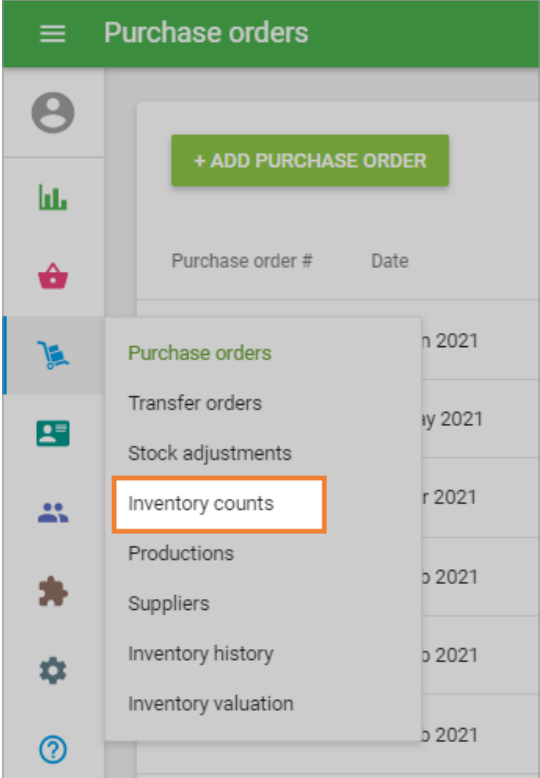
## 4.7 How to Work with Inventory Count

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

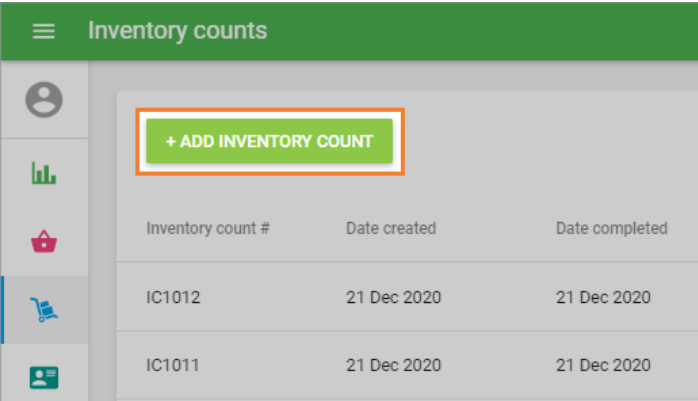


The screenshot shows the 'Purchase orders' section of a software interface. A sidebar menu on the left contains various icons. The main area displays a table with columns 'Purchase order #' and 'Date'. A dropdown menu is open, listing several options: 'Purchase orders', 'Transfer orders', 'Stock adjustments', 'Inventory counts' (which is highlighted with an orange box), 'Productions', 'Suppliers', 'Inventory history', and 'Inventory valuation'.

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

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

2

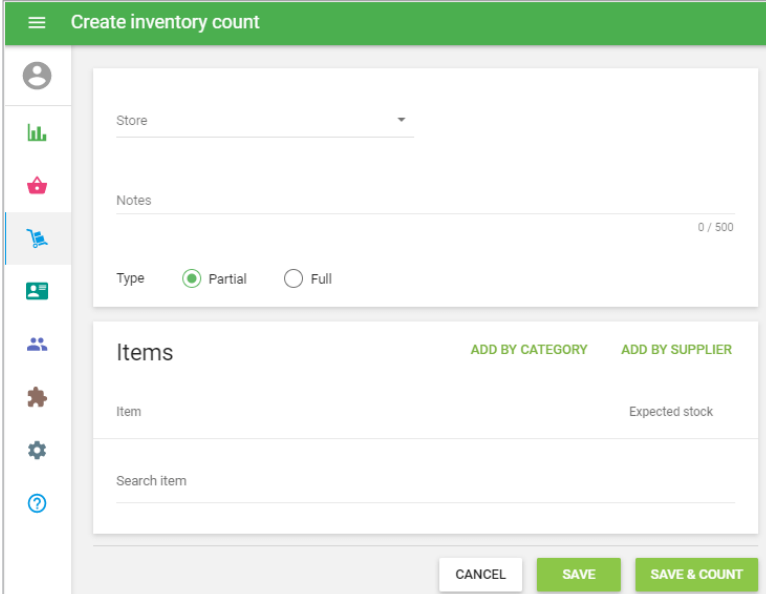


The screenshot shows the 'Inventory counts' section of the software interface. A sidebar menu is visible on the left. The main area features a green button labeled '+ ADD INVENTORY COUNT' at the top, which is highlighted with an orange box. Below the button is a table with three columns: 'Inventory count #', 'Date created', and 'Date completed'. The table contains two rows of data.

Inventory count #	Date created	Date completed
IC1012	21 Dec 2020	21 Dec 2020
IC1011	21 Dec 2020	21 Dec 2020

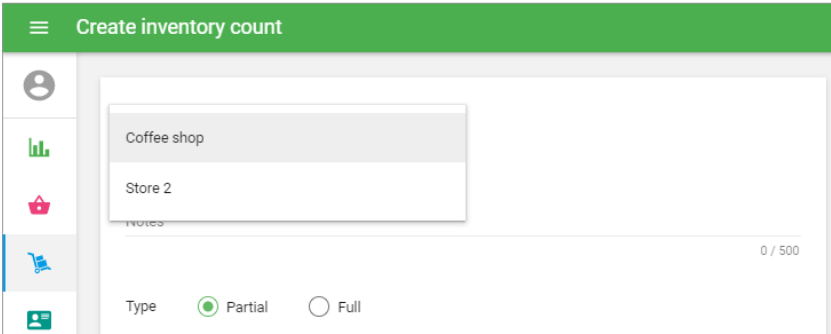
The form 'Create inventory count' will open for editing.

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.

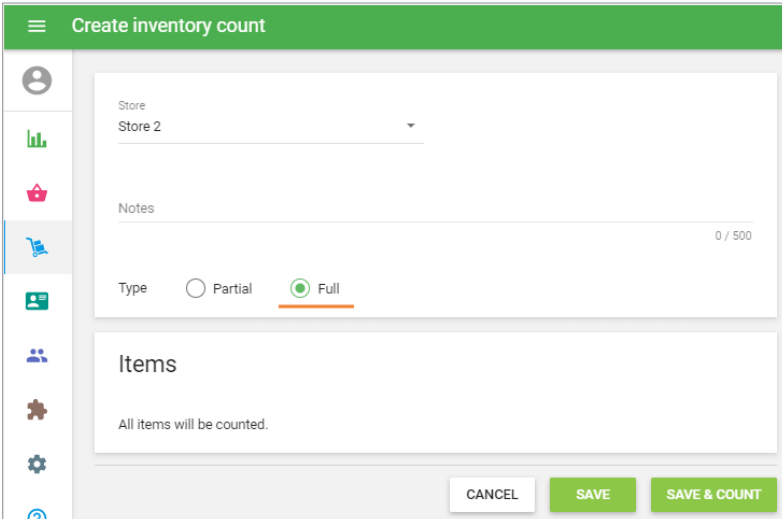
4



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.

☰
Create inventory count

👤
📊
🛒
🚚
👥
⚙️
❓

Store  
Coffee shop

Notes  
0 / 500

Type    ☒ Partial    ☐ Full

Items

ADD BY CATEGORY

ADD BY SUPPLIER

Item	Expected stock
Banana cake SKU 10054	13
Berry cake SKU 10080	100
<input type="text" value="Search item"/>	

CANCEL
SAVE
SAVE & COUNT

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.

☰
Inventory count details

👤
📊
🛒
🚚
👥
⚙️
❓

< All inventory counts
COUNT STOCK
EDIT
MORE ▾

## IC1013

Pending

Date created: 11 Jun 2021 12:14  
Created by: Owner

Store:  
Coffee shop  
21 Avenue, Brooklyn, New York, NY, United States

### Items

Item	Expected stock	Counted	Difference	Cost difference
Banana cake SKU 10054	13	—	—	—
Berry cake SKU 10080	100	—	—	—
<b>Total</b>		—	—	—

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

**8**

The screenshot shows the 'Count stock' interface. At the top, there's a green header with a menu icon and the text 'Count stock'. Below the header, on the left, is a sidebar with icons for user, charts, shopping cart, inventory, people, settings, and help. The main area has a 'Count item' field with a dropdown arrow, a 'Quantity' field with the value '1', and an 'ADD TO COUNTED' button. Below this is a table with columns: Item, Expected stock, Counted, Difference, and Cost difference. The table contains two rows: 'Banana cake SKU 10054' with Expected stock 13, Counted 13, Difference 0, and Cost difference 0.00; and 'Berry cake SKU 10080' with Expected stock 100, Counted 98, Difference -2, and Cost difference -10.00. At the bottom of the table, there's a 'Total' row with Difference -2 and Cost difference -10.00. Below the table are 'SAVE' and 'COMPLETE' buttons. On the right side, there's a 'History' panel with a close icon (X) and a list of items: '98 Berry cake' and '13 Banana cake', each with a trash icon.

Item	Expected stock	Counted	Difference	Cost difference
Banana cake SKU 10054	13	13	0	0.00
Berry cake SKU 10080	100	98	-2	-10.00
<b>Total</b>			<b>-2</b>	<b>-10.00</b>

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**

The screenshot shows the 'Count stock' interface with a new item added. The 'Count item' field now shows 'T-Shirt (L / Black)'. The table has an additional row for 'T-Shirt (L / Black)' with Expected stock 0, Counted 1, Difference 1, and Cost difference 10.00. A yellow warning icon is next to the item name, and a tooltip message says 'This item was not part of your planned count.' Below the table, the 'Total' row shows Difference -1 and Cost difference 0.00. The 'SAVE' and 'COMPLETE' buttons are still at the bottom. The 'History' panel on the right is not visible in this screenshot.

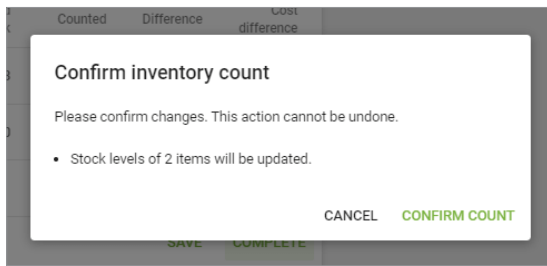
Item	Expected stock	Counted	Difference	Cost difference
Banana cake SKU 10054	13	13	0	0.00
Berry cake SKU 10080	100	98	-2	-10.00
T-Shirt (L / Black)	0	1	1	10.00
<b>Total</b>			<b>-1</b>	<b>0.00</b>

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

Inventory count #	Date created	Date completed	Store	Status	Notes
IC1015	11 Jun 2021	—	Store 2	In progress	
IC1014	11 Jun 2021	—	Coffee shop	Pending	
IC1013	11 Jun 2021	11 Jun 2021	Coffee shop	Completed	
IC1012	21 Dec 2020	21 Dec 2020	Shop 2	Completed	

## 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

**Create item**

Name: Pizza Category: No category

Sold by: ☒ Each ☐ Weight/Volume

Price: Leave the field blank to indicate the price upon sale. Average cost: 1.51

SKU: 10037 Barcode: Value updates automatically when you produce or receive an item

**Inventory**

Composite item: ☒ Use production: ☒

Component	Quantity	Cost
Pizza dough SKU 10011	0.500	1.25
Cheese SKU 10017	0.100	0.09
Onion SKU 10020	0.075	0.03
Tomatoes SKU 10027	0.200	0.14
<b>Total cost</b>		<b>1.51</b>

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.

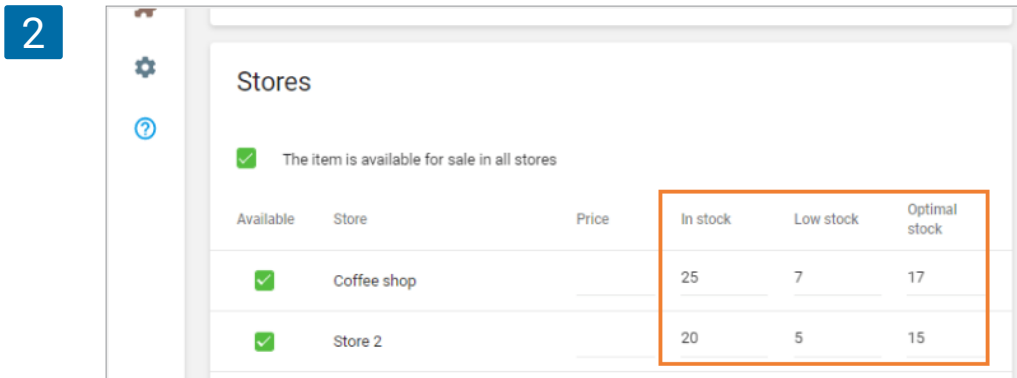
The production option is only available for composite items. Open the composite item to edit or create a new one. Switch on the 'Use production' option in the Inventory section.



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.

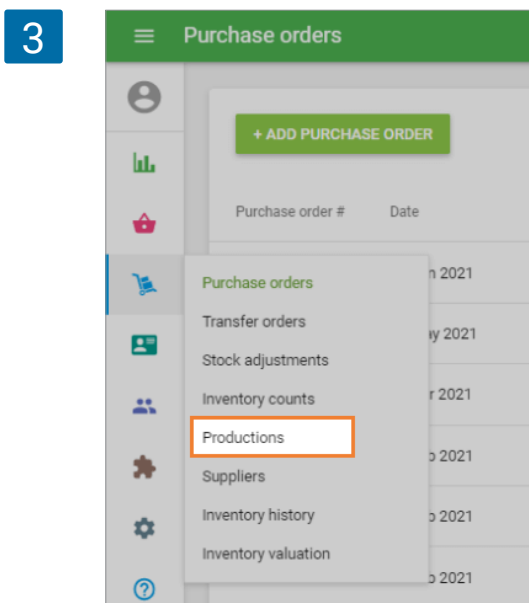
From now on, the stock of the ingredients will be changed by creating Production or Disassembling (explained later).

When selling an item with the "Production" option on, the stock of the composite item will be reduced, but not its ingredients.

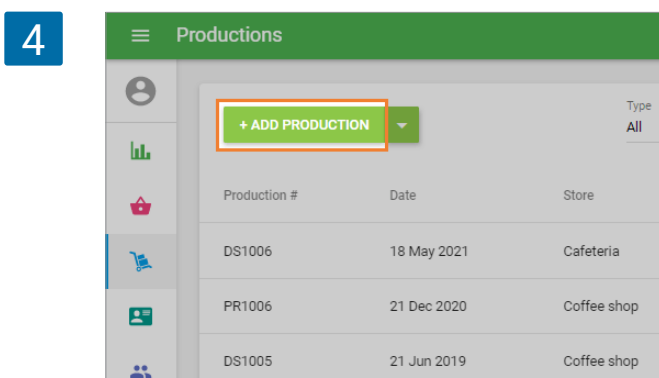


Don't forget to save changes.

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

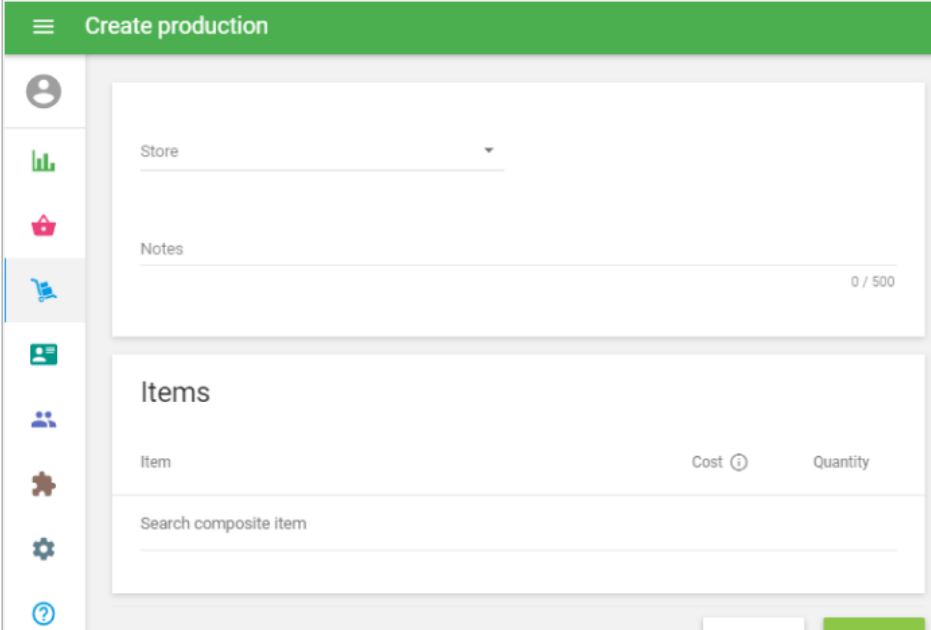


To create a production, click on the '+ Add production' button.



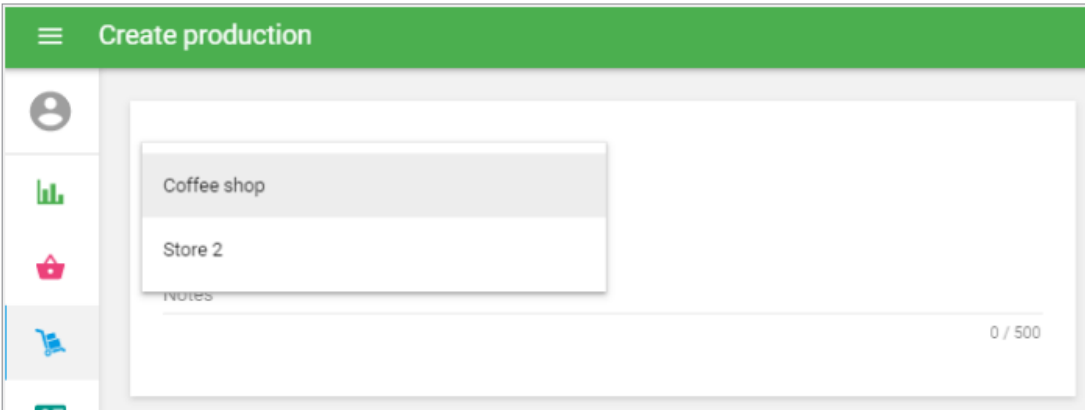
The form 'Create production' will open for editing.

5



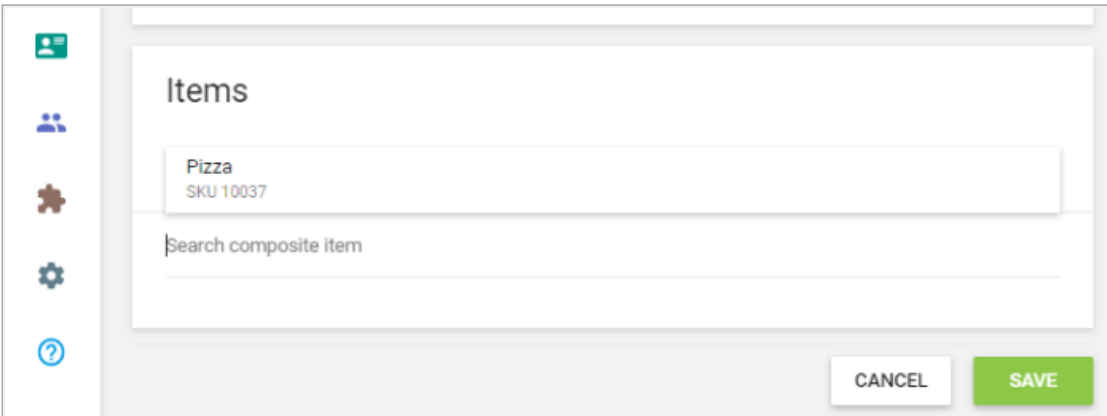
Select the store from the drop-down list where you would like to perform the production. You can also make notes in the 'Notes' field.

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

Item	Cost	Quantity
Pizza SKU 10037	1.51	25
Coffee 200ml SKU 10038	1.40	50

Search composite item

CANCEL SAVE

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

Production details

< Productions MORE

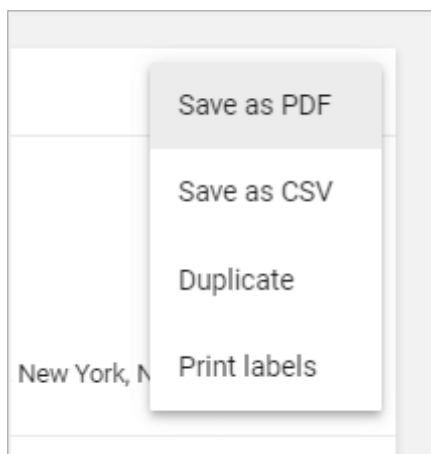
**PR1007**

Date: 11 Jun 2021  
Created by: Owner

Store:  
Coffee shop  
21 Avenue, Brooklyn, New York, NY, United States

Item name	Cost	Quantity
Pizza SKU 10037	1.51	25
Coffee 200ml SKU 10038	1.40	50

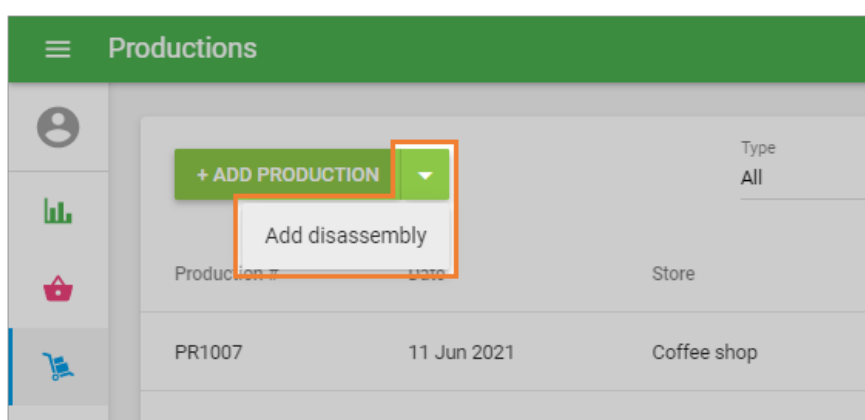
10



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

Item	Cost	Quantity
Pizza SKU 10037	1.51	1

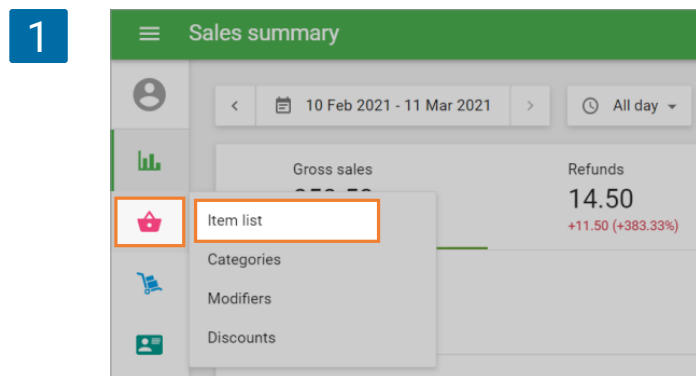
After clicking on the 'Save' button, the stock of the disassembled composite items will be decreased by the mentioned quantity and the stock of their components will be increased based on their use in the produced composite items. The cost of the components is also renewed.

## 4.9 How to Print Labels for Items

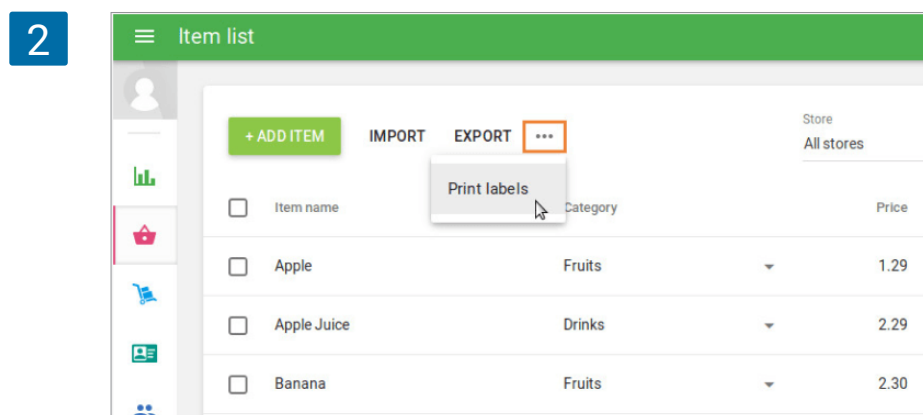
Printing Labels is a part of the [Advanced inventory](#) management and is available only to those users who have subscribed to this functionality.

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.

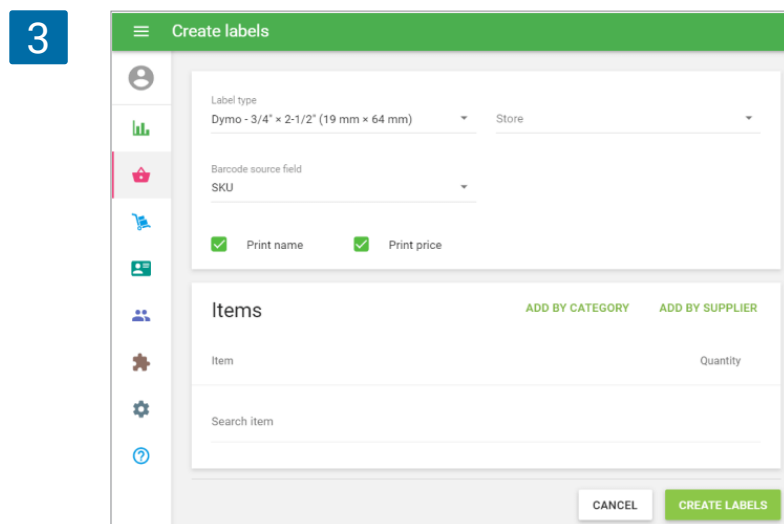
Go to the 'Item list' menu in the [Back Office](#).



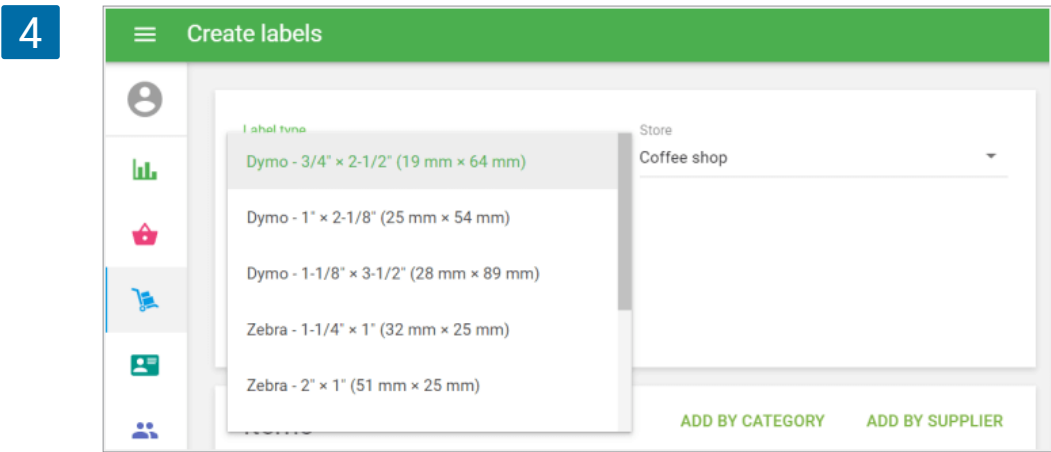
Click on the 'Print labels' button at the three dots menu.



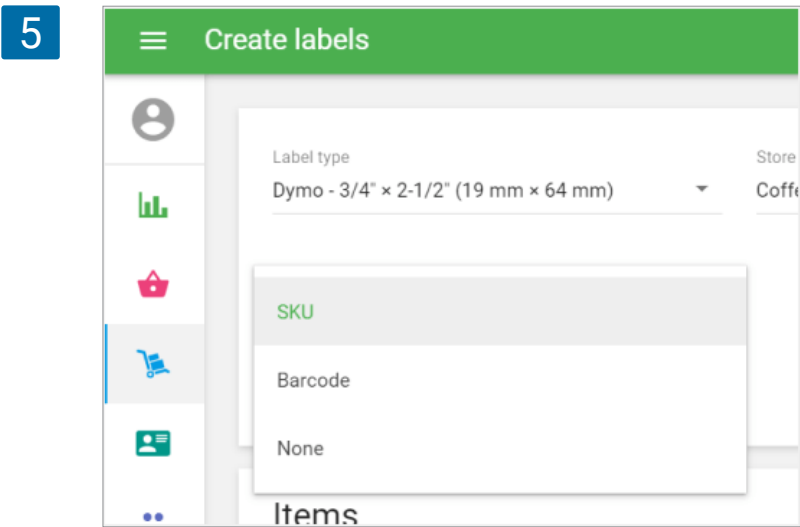
The form 'Create labels' will open for editing.



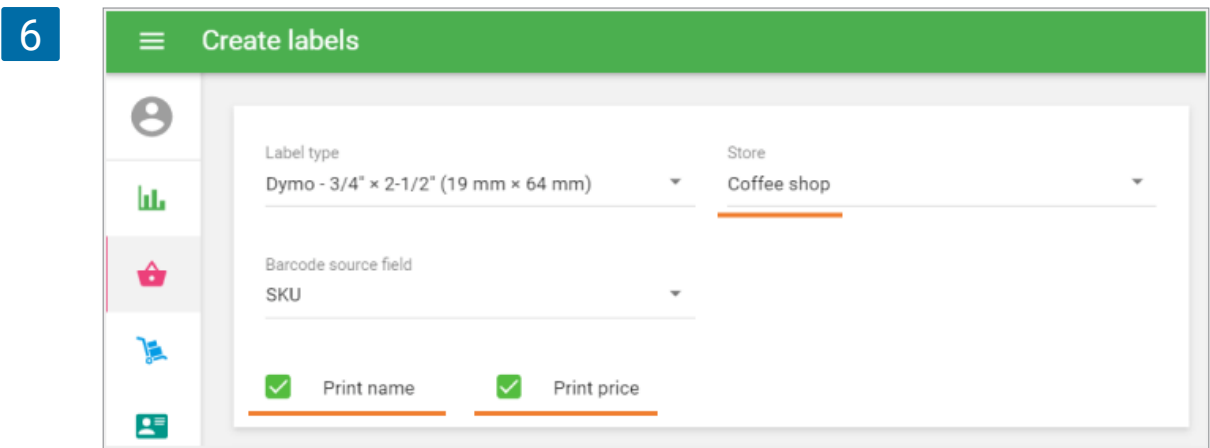
Select a 'Label type' from the drop-down list of predefined printing templates.



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.



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.



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 screenshot shows the 'Create labels' interface. At the top is a green header bar with a menu icon and the text 'Create labels'. On the left is a sidebar with icons for user, analytics, shopping, cart, people, puzzle, settings, and help. The main area has a form for 'Label type' (Dymo - 3/4" x 2-1/2" (19 mm x 64 mm)) and 'Store' (Coffee shop). Below this is a 'Barcode source field' dropdown set to 'SKU'. There are two checkboxes: 'Print name' and 'Print price', both checked. Below the form is a table titled 'Items' with columns 'Item' and 'Quantity'. The table contains four rows: 'T-shirt (Black / L) SKU 10041' with quantity 1, 'T-shirt (White / L) SKU 10027' with quantity 2, 'T-shirt (Red / L) SKU 10046' with quantity 3, and 'T-shirt (Yellow / L) SKU 10051' with quantity 4. Below the table is a 'Search item' input field. At the bottom right are 'CANCEL' and 'CREATE LABELS' buttons.

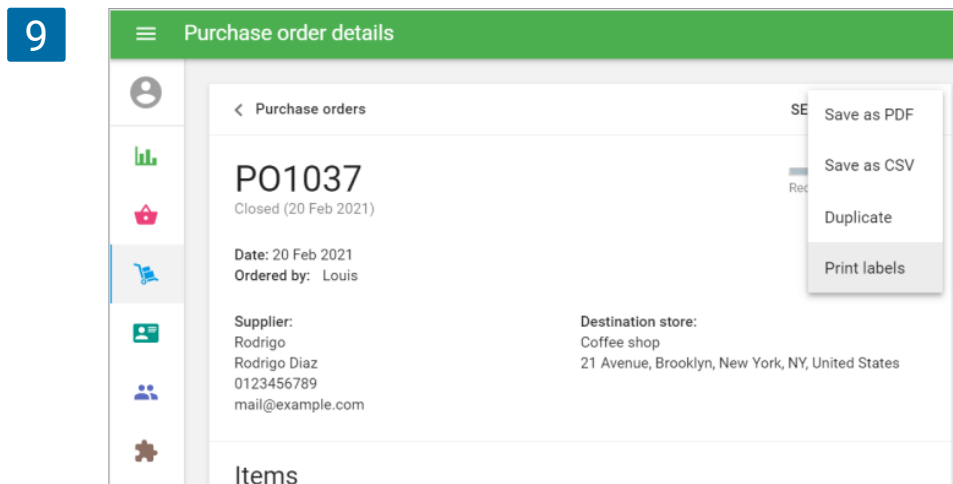
The generated HTML page with labels will open in a new tab of the browser. You can print the labels on your printer by clicking on the 'Print' button.

**8**

The screenshot shows the 'Print labels' page. At the top is a green header bar with the text 'Print labels'. Below the header is a green 'PRINT' button. Below the button is a list of five labels. Each label contains the price '20.00', the item name, a barcode, and the SKU. The items are: 'T-shirt (Black / L) SKU 10041', 'T-shirt (White / L) SKU 10027', 'T-shirt (White / L) SKU 10027', 'T-shirt (Red / L) SKU 10046', and 'T-shirt (Red / L) SKU 10046'.

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.



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.

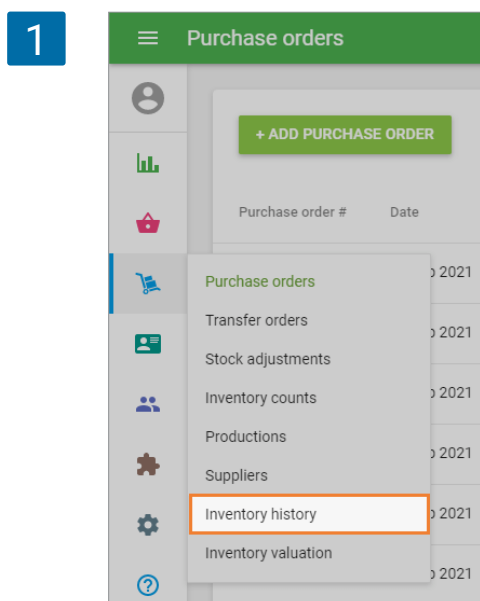
#### Note

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.



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

Date	Item	Store	Employee	Reason	Adjustment	Stock after
07 Apr 2021 16:11	Beef and Chicken Satay	Coffee shop	Louis	Sale #42-1002	-2	4
07 Apr 2021 16:10	Beef and Chicken Satay	Coffee shop	Louis	Sale #42-1001	-1	6
07 Apr 2021 16:10	Beef and Chicken Satay	Coffee shop	Louis	Sale #42-1001	-1	7
05 Apr 2021 22:01	Banana cake	Coffee shop	Louis	Damage #SA1027	-2	19
05 Apr 2021 21:59	Banana cake	Cafeteria	Louis	Transfer #TO1020	20	20
05 Apr 2021 21:59	Banana cake	Coffee shop	Louis	Transfer #TO1020	-20	21

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

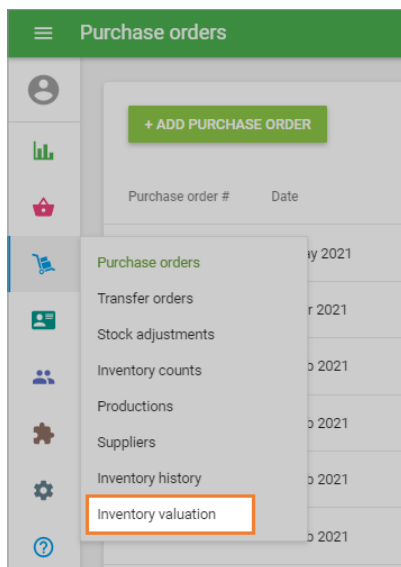
You will see all changes in the stock of selected item.

4

Date	Store	Employee	Reason	Adjustment	Stock after
05 Apr 2021 22:01	Coffee shop	Louis	Damage #SA1027	-2	19
05 Apr 2021 21:59	Cafeteria	Louis	Transfer #TO1020	20	20
05 Apr 2021 21:59	Coffee shop	Louis	Transfer #TO1020	-20	21
25 Mar 2021 23:08	Coffee shop	Louis	Sale #36-1005	-1	41
25 Mar 2021 23:07	Coffee shop	Louis	Sale #36-1004	-1	42
25 Mar 2021 22:57	Coffee shop	Louis	Sale #36-1003	-1	43
25 Mar 2021 22:56	Coffee shop	Louis	Sale #36-1002	-1	44
25 Mar 2021 21:58	Coffee shop	Louis	Sale #36-1001	-1	45

## 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

A screenshot of the 'Inventory valuation' report. At the top, there's a summary section with four metrics: Total inventory value (\$198.40), Total retail value (\$434.17), Potential profit (\$235.77), and Margin (54.3%). Below this is an 'EXPORT' button. The main part of the report is a table with columns: Item, In stock, Cost, Inventory value, Retail value, Potential profit, and Margin. The table lists several items: Apples, Bacon, Baguette, Beef, and Black Tea, 200 g.

Inventory valuation						
31 Jan 2023 All categories						
Total inventory value		Total retail value		Potential profit		Margin
\$198.40		\$434.17		\$235.77		54.3 %
EXPORT						
Item	In stock	Cost	Inventory value	Retail value	Potential profit	Margin
Apples	13.5	\$1.50	\$20.25	\$48.60	\$28.35	58.33%
Bacon	15	\$2.00	\$30.00	\$75.00	\$45.00	60%
Baguette	0	\$0.00	\$0.00	\$0.00	\$0.00	—
Beef	0	\$0.00	\$0.00	\$0.00	\$0.00	—
Black Tea, 200 g	0	\$0.90	\$0.00	\$0.00	\$0.00	—

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

The screenshot shows the 'Create item' form in a web application. The form has a green header bar with a menu icon and the text 'Create item'. On the left, there is a vertical sidebar with icons for various functions. The main form area contains the following fields and options:

- Name:** 'Water, bottle 0.5L'
- Category:** 'No category' (with a dropdown arrow)
- Description:** An empty text box.
- Availability:** A checked checkbox labeled 'The item is available for sale'.
- Sold by:** Radio buttons for 'Each' (selected) and 'Weight/Volume'.
- Price:** '\$10.00'
- Cost:** '\$5.00'
- SKU:** '10004'
- Barcode:** An empty text box.
- Inventory:** A section with a 'Composite item' toggle switch.

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

The screenshot shows the 'Create item' form in a web application, similar to the one above but for a composite item. The form has a green header bar with a menu icon and the text 'Create item'. On the left, there is a vertical sidebar with icons for various functions. The main form area contains the following fields and options:

- Name:** 'Water, box 0.5L, 25p'
- Category:** 'No category' (with a dropdown arrow)
- Description:** An empty text box.
- Availability:** An unchecked checkbox labeled 'The item is available for sale'.
- Sold by:** Radio buttons for 'Each' (selected) and 'Weight/Volume'.
- Price:** An empty text box.
- Cost:** '\$0.00'
- SKU:** An empty text box.
- Barcode:** An empty text box.
- Inventory:** A section with a 'Composite item' toggle switch.

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**

**Edit item**

10001 Barcode

**Inventory**

Composite item ☒

Use production ☒

Component	Quantity	Cost
Water, bottle 0.5L SKU 10000	25,000	125,00

Item search

Total cost 125,00

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**

**Create purchase order**

Supplier  
Water Company

Purchase order date  
Apr 24, 2020

Expected on

Notes  
0 / 500

**Items** AUTOFILL

Item	In stock	Incoming	Quantity	Purchase cost	Amount
Water, box 0.5L, 25p SKU 10001	—	—	4	125,00	500,00

Search item

Add additional costs

Total 500,00

CANCEL SAVE AS DRAFT CREATE

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

5

Receive items

Items

MARK ALL RECEIVED

Item	Ordered	Received	To receive
Water, box 0.5L, 25p SKU 10001	4	0	4

CANCELRECEIVE

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

6

Create disassembly

Notes

0 / 500

Items

Item	Cost ⓘ	Quantity
Water, box 0.5L, 25p SKU 10000	125,00	4

Search composite item

CANCELSAVE

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

7

Create item

Name

Water, bottle 0.5L

Category

No category

Description

☒ The item is available for sale

Sold by

☒ Each ☐ Weight/Volume

Price

\$10.00

Cost

\$5.00

Leave the field blank to indicate the price upon sale

SKU

10004

Barcode

Inventory

Composite item ⓘ

☐

Track stock

☒

In stock

100

Low stock

Item quantity at which you will be notified about low stock

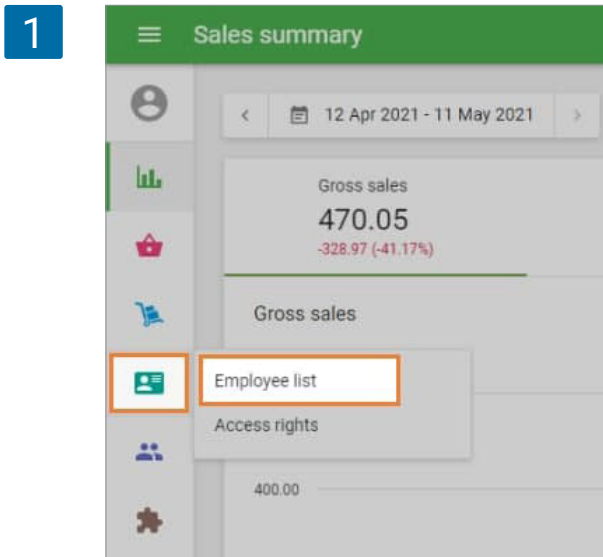


# 5. Employees

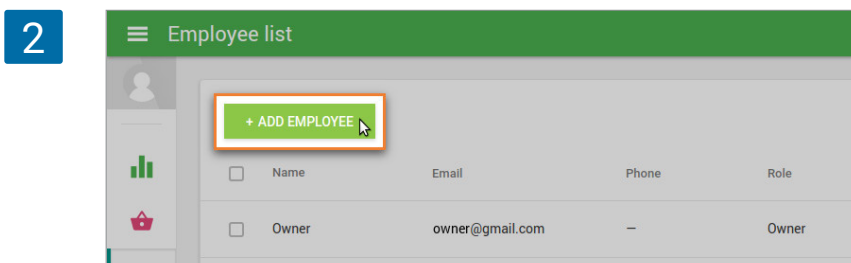


## 5.1 How to Add an Employee in Loyverse

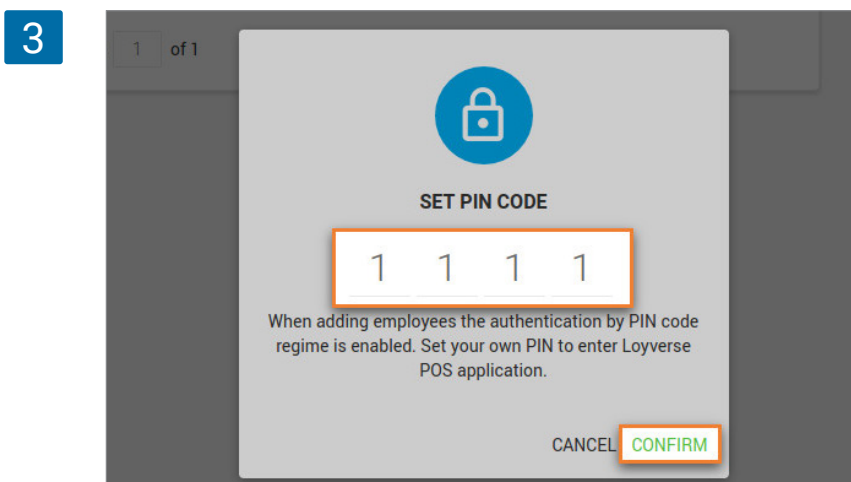
After logging in to [Back Office](#), go to the 'Employee list' in the 'Employees' section.



Click on the 'ADD EMPLOYEE' button.



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.



4

Create employee

Name  
John

Email  
john@mail.com

Phone  
5553354896

Role  
Select role  
Administrator  
Manager  
Cashier  
Invite to the app (with checkmark)

CANCEL SAVE

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

Create employee

Name  
John

Email  
john@mail.com

Business phone number  
5553354896

Role  
Cashier

POS PIN  
6 4 8 3

CANCEL SAVE

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

**Edit employee**

Name  
**Isaak**

Email  
isaak@getnada.com

Phone  
12211543

Role  
Cashier

POS PIN  
4 4 4 4

First login to the back office Sunday, 10 January 2021

Stores Access to all stores

DELETE CANCEL SAVE

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

7

Stores

☐ Access to all stores

☐ The Cofee 2

☒ The Coffee

SHOW LESS

DELETE CANCEL SAVE

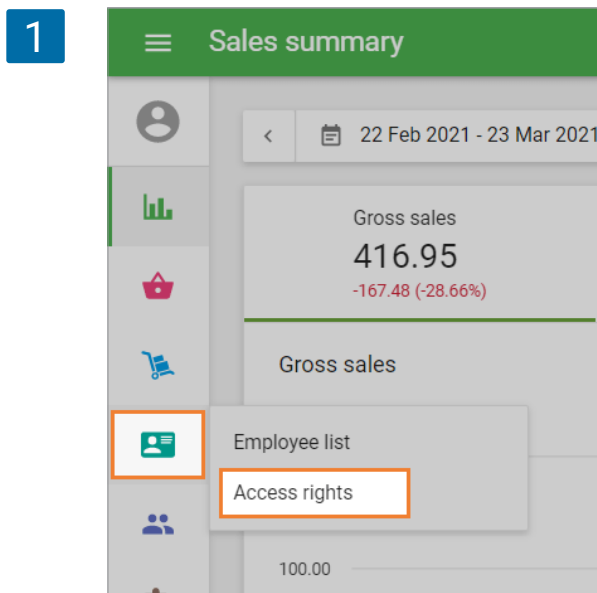
Don't forget to save changes.

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

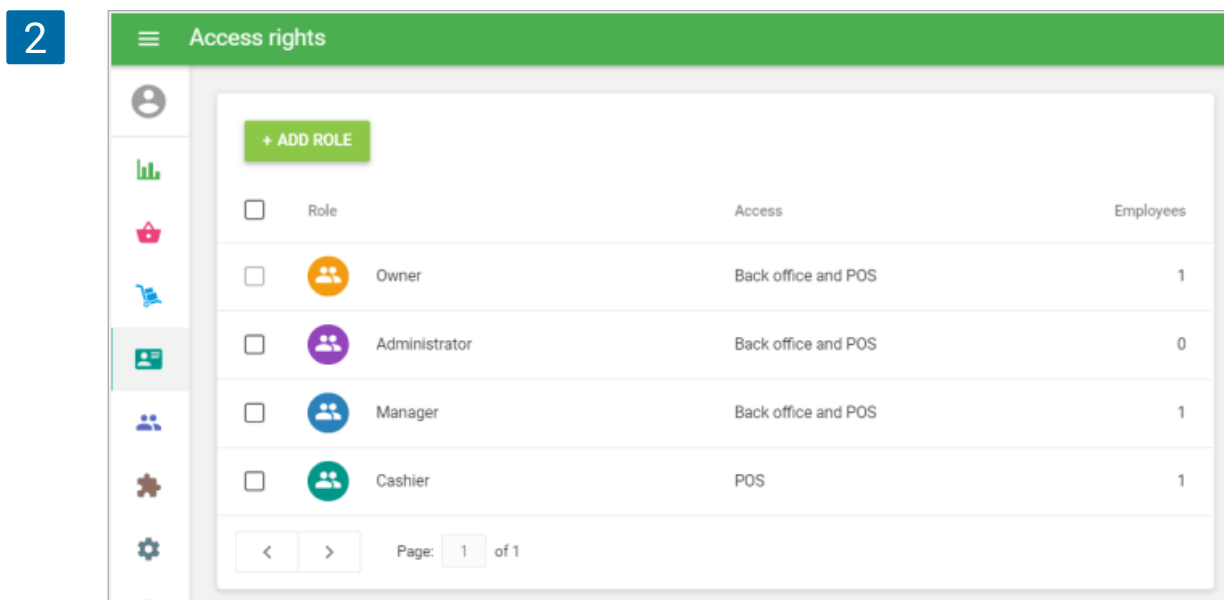
## 5.2 How to Manage Access Rights of Employees

The owner can give employees different access rights to the POS app (Play Market or App Store) and the Back Office. To do this, you can set up the users' roles.

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



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.



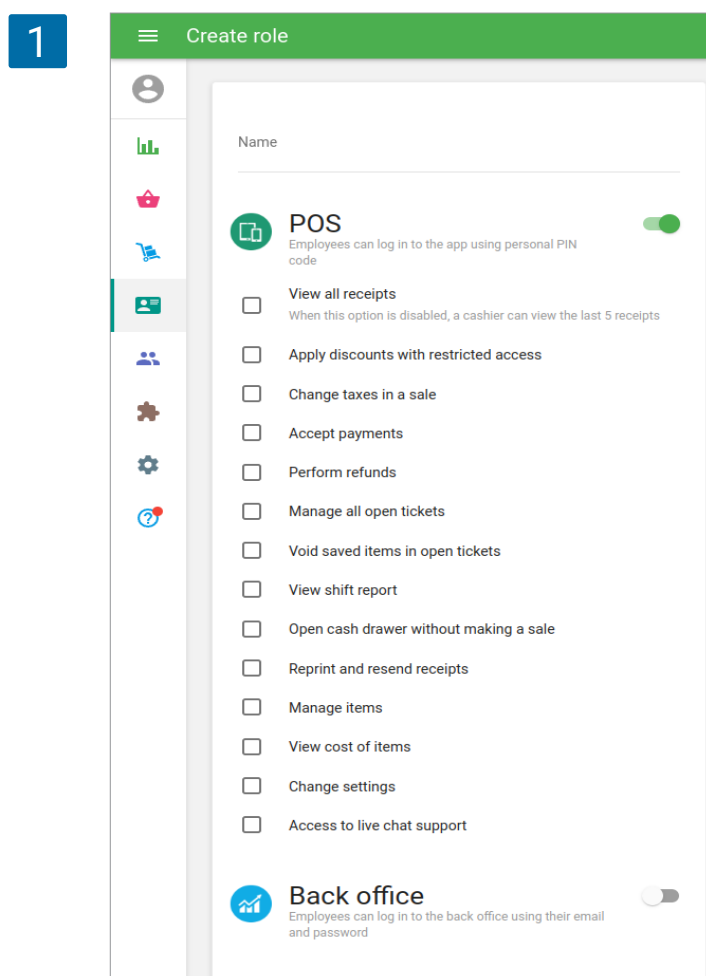
The owner has all the possible rights, which cannot be changed. All other groups can be edited.

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 name.



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.

### Accept payments

When this option is disabled, the employee can not charge the ticket and accept payments.

### 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](#)

## View cost of items

It gives employees the right to see the Cost (or Average cost) field in the item's card.

## 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

Create role

Name

**POS**  
Employees can log in to the app using personal PIN code

☐ View all receipts  
When this option is disabled, a cashier can view the last 5 receipts

☐ Apply discounts with restricted access

☐ Change taxes in a sale

☐ Accept payments

☐ Perform refunds

☐ Manage all open tickets

☐ Void saved items in open tickets

☐ View shift report

☐ Open cash drawer without making a sale

☐ Reprint and resend receipts

☐ Manage items

☐ View cost of items

☐ Change settings

☐ Access to live chat support

**Back office**  
Employees can log in to the back office using their email and password

## 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

## Manage items

Gives employees the right to access the Items menu and receive a [low stock notifications](#).

## Manage inventory

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](#)

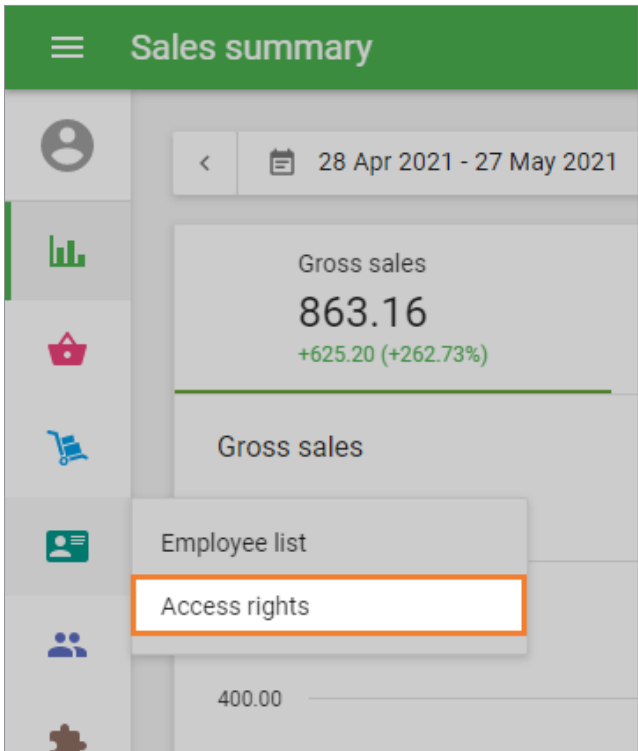
**Access to live chat support**

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

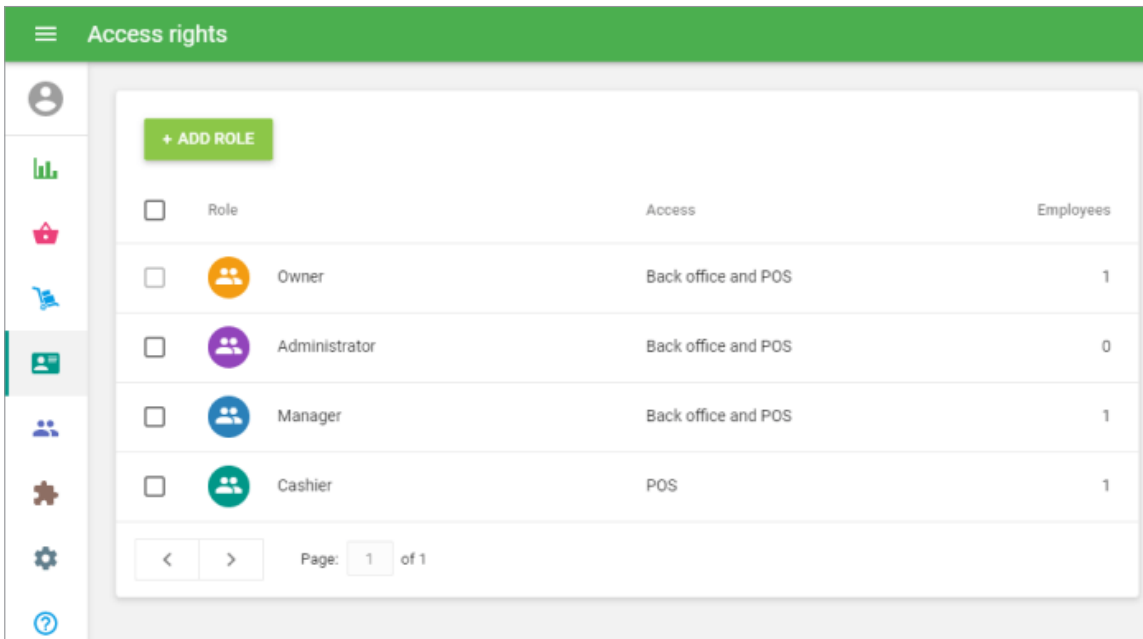
1

The screenshot shows the 'Sales summary' screen in the Loyverse POS app. On the left, there is a vertical sidebar menu with various icons. The 'Access rights' option, represented by a group of people icon, is highlighted with an orange rectangular box. The main content area shows 'Gross sales' for the period '28 Apr 2021 - 27 May 2021' with a value of '863.16' and a change of '+625.20 (+262.73%)'. Below this, there is another 'Gross sales' section with a value of '400.00'.

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

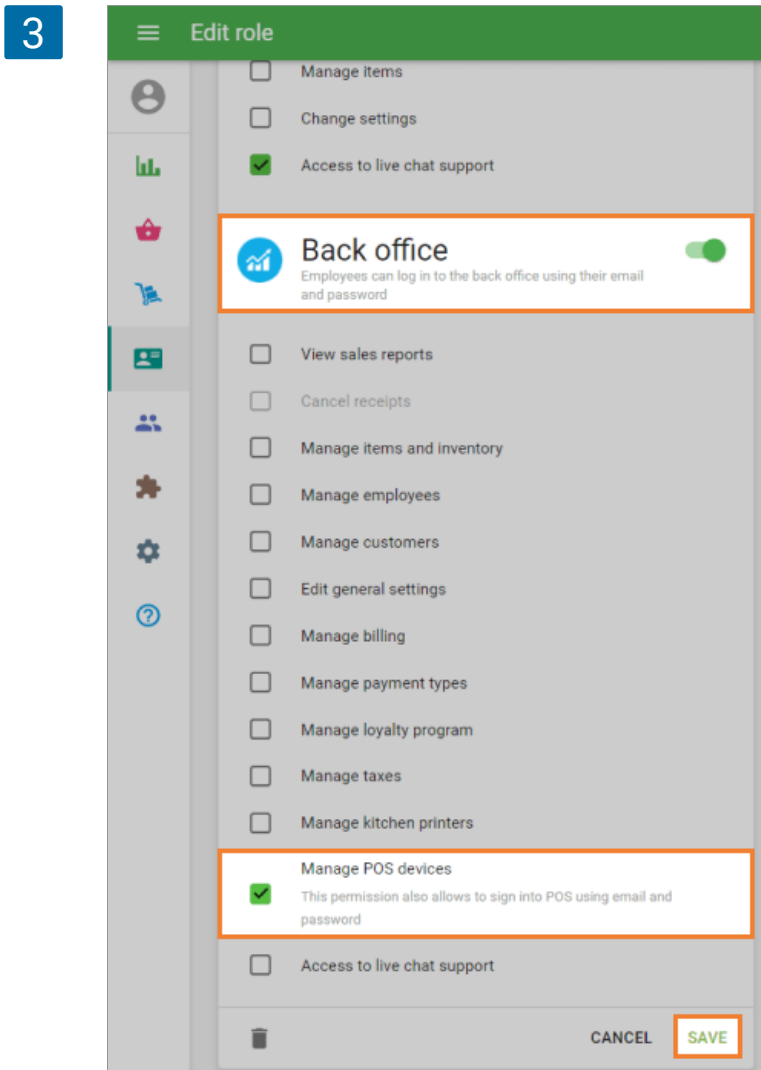
Choose an existing group with your employees or create a new role.

2

The screenshot shows the 'Access rights' screen in the Loyverse POS app. At the top, there is a green header bar with the title 'Access rights'. Below the header, there is a green button labeled '+ ADD ROLE'. The main content area is a table with three columns: 'Role', 'Access', and 'Employees'. The table lists four roles: 'Owner', 'Administrator', 'Manager', and 'Cashier'. Each role has a checkbox in the 'Role' column, a corresponding icon, and a value in the 'Employees' column. The 'Access' column shows the permissions for each role. At the bottom of the table, there is a pagination bar showing 'Page: 1 of 1'.

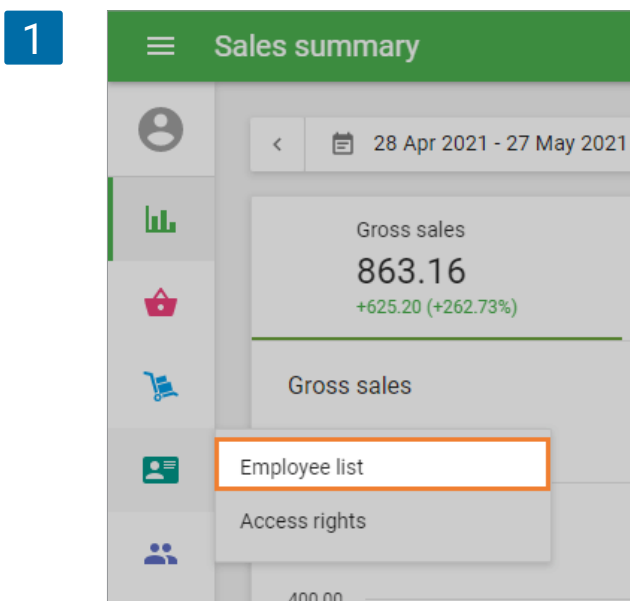
Role	Access	Employees
<input type="checkbox"/> Owner	Back office and POS	1
<input type="checkbox"/> Administrator	Back office and POS	0
<input type="checkbox"/> Manager	Back office and POS	1
<input type="checkbox"/> Cashier	POS	1

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



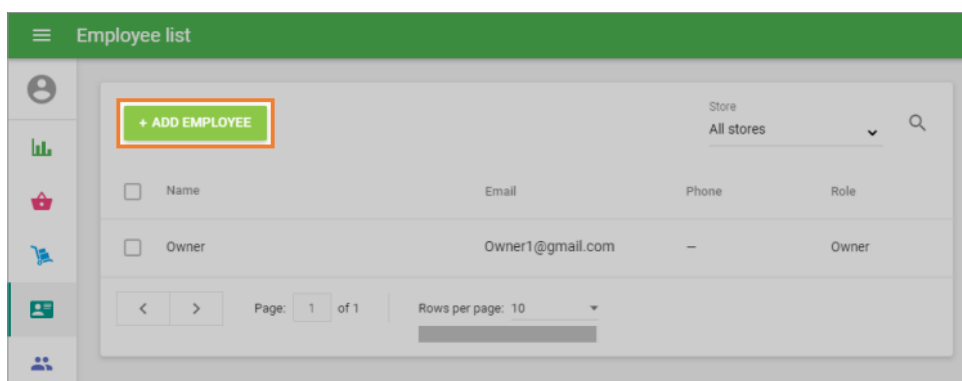
### 5.3.2 Assign employee to the group

Go to the 'Employee list' in the 'Employees' section.

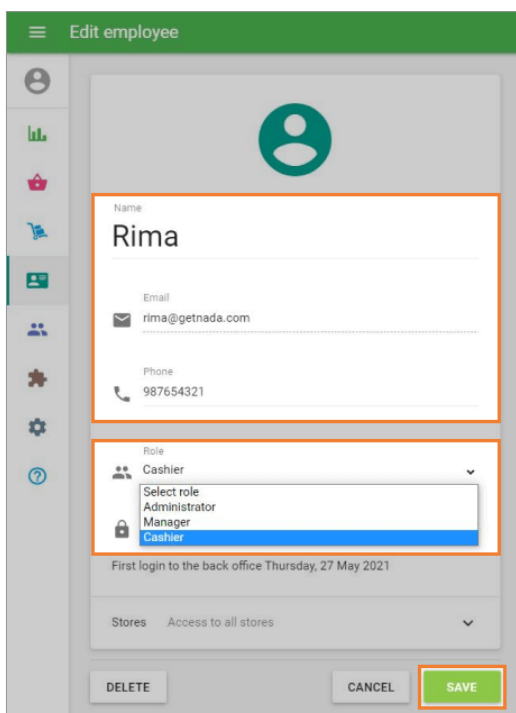


Create Employee by clicking on the 'ADD EMPLOYEE' button. If you have created employee before, open it for editing.

2



3

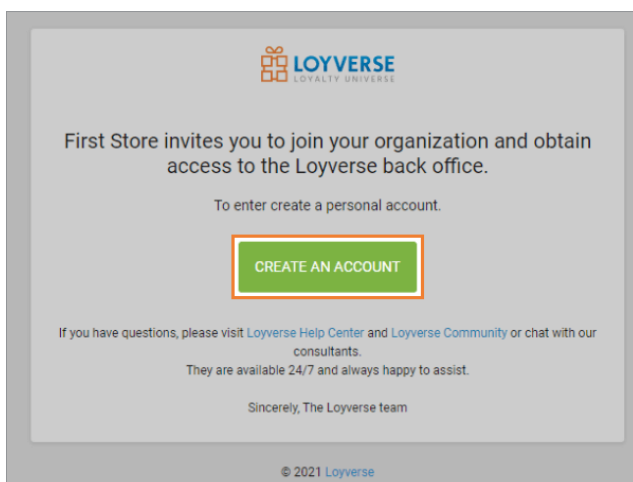


At the 'Edit employee' window fill in employee's name, email address, phone number and the role (the group that you created in the first step).

### 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.

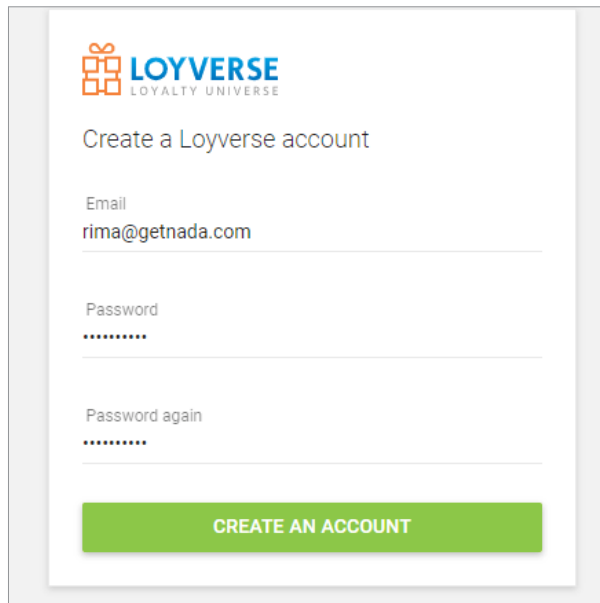
1





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

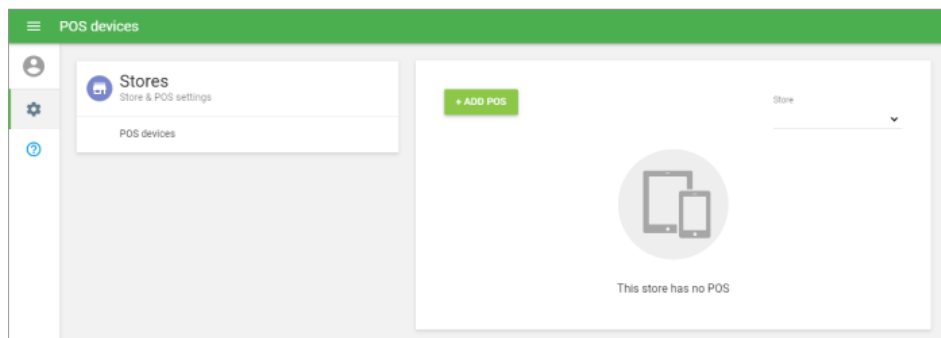
2



The screenshot shows a web form titled "Create a Loyverse account" with the Loyverse logo at the top. The form contains three input fields: "Email" with the value "rima@getnada.com", "Password" with masked characters "\*\*\*\*\*", and "Password again" also with masked characters "\*\*\*\*\*". A green button labeled "CREATE AN ACCOUNT" is positioned at the bottom of the form.

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

3



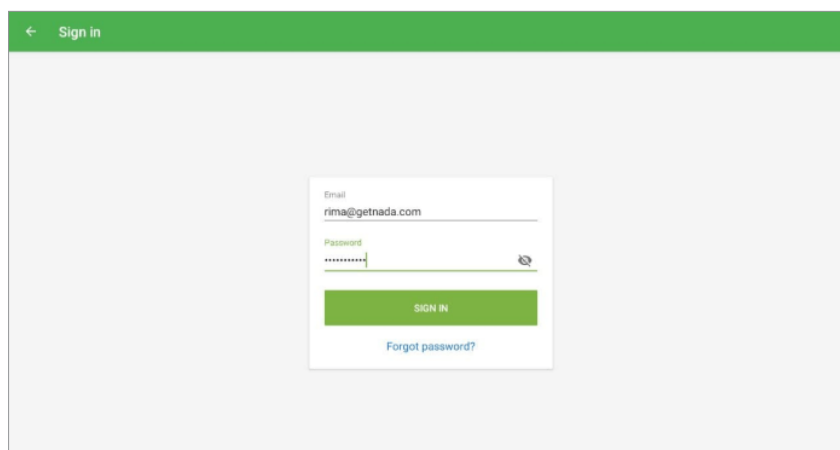
The screenshot displays the "POS devices" management interface. On the left is a sidebar with a menu containing "Stores", "Store & POS settings", and "POS devices". The main content area features a green "+ ADD POS" button, a "Store" dropdown menu, and a large circular icon representing POS devices. Below the icon, it states "This store has no POS".

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.

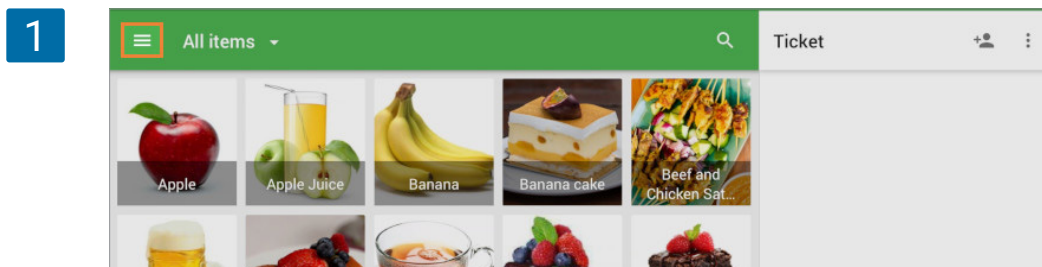
1



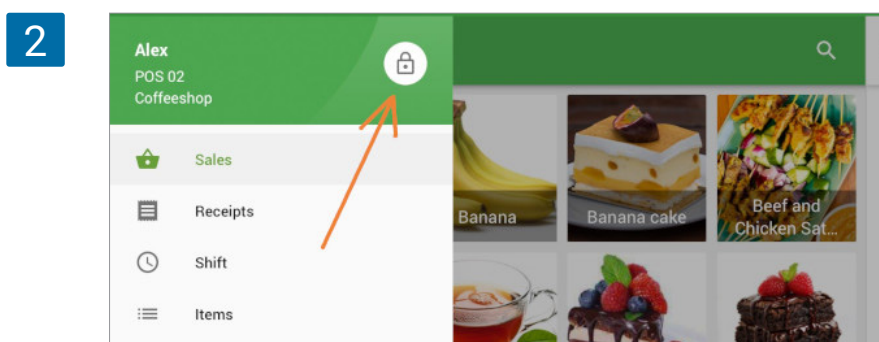
The screenshot shows the "Sign in" screen of the Loyverse POS application. It features a central login form with fields for "Email" (containing "rima@getnada.com") and "Password" (masked with "\*\*\*\*\*"). A green "SIGN IN" button is located below the password field, and a blue link for "Forgot password?" is at the bottom of the form. The screen has a green header bar with a back arrow and the text "Sign in".

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

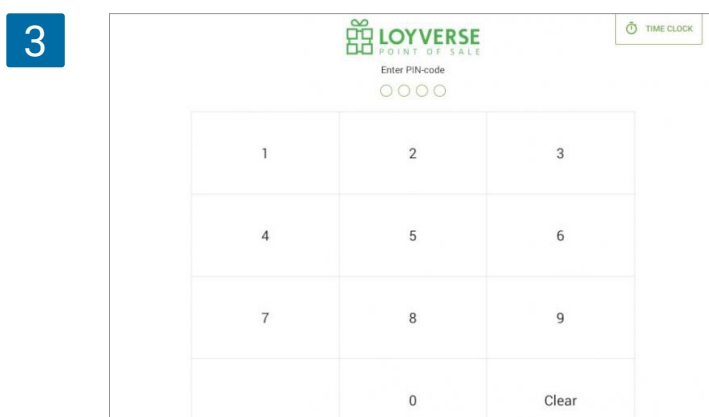
If you want to switch the user account to another employee in an already opened Loyverse POS app without exiting, you need to go to Menu.



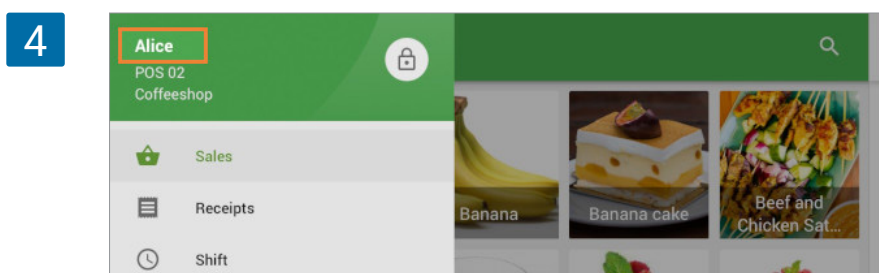
Then, tap on the lock icon.



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



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

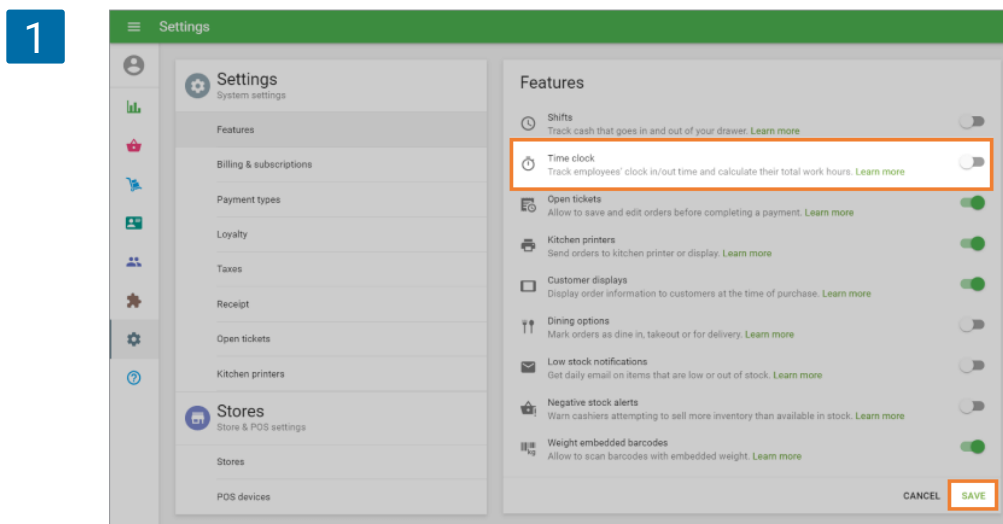


## 5.5 Using Time Clock to Track Employees Hours

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.

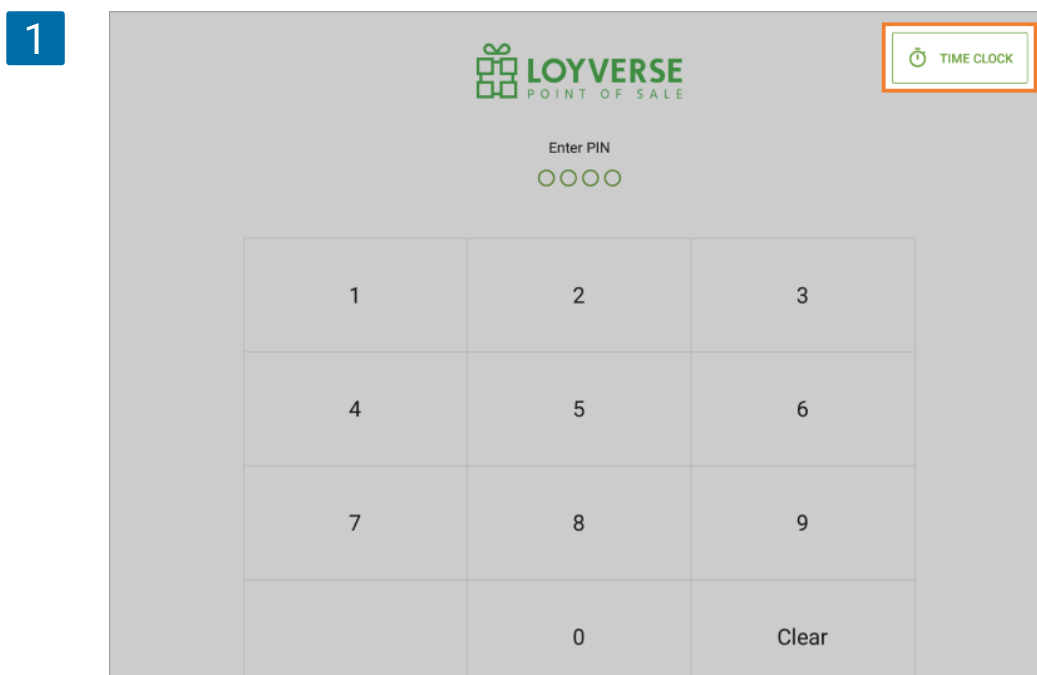


Don't forget to save changes.

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

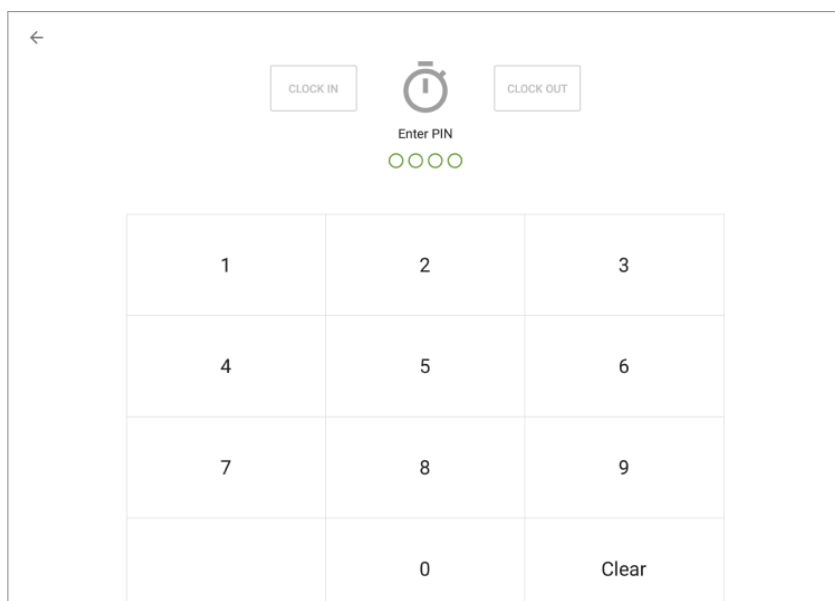
### 5.5.2 Using at POS

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



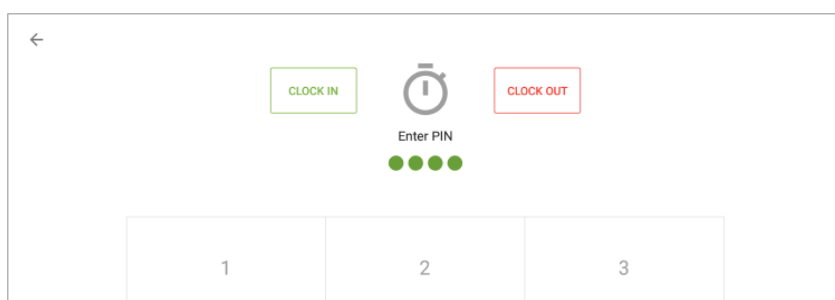
Enter PIN-code on the number pad.

2



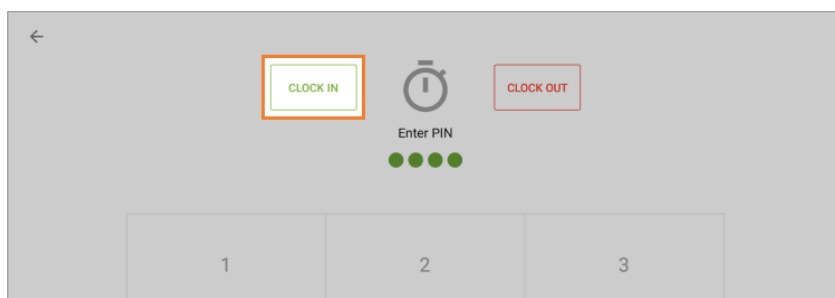
Then 'Clock In' and 'Clock Out' buttons become active.

3



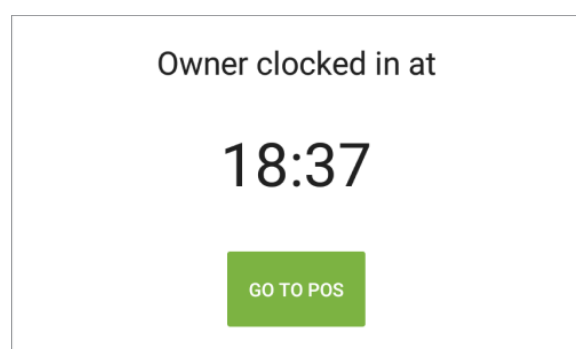
Tap 'Clock In' button to start tracking hours and record a time punch.

4



Then you will see information about the clock in time.

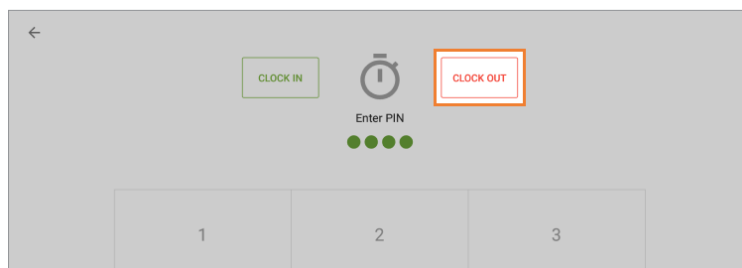
5



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

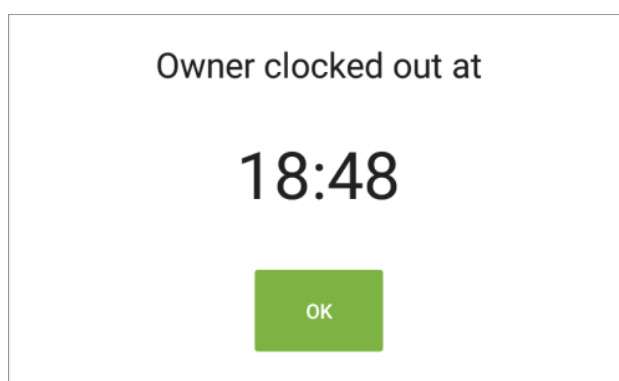
After finishing work go to 'Time clock' screen, tap 'Clock Out' button to record a time punch.

6



Then you will see information about clock out time.

7

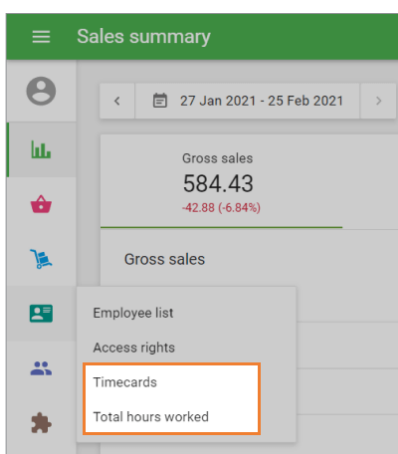


Tap to 'OK' button.

### 5.5.3 Reports at the Back Office

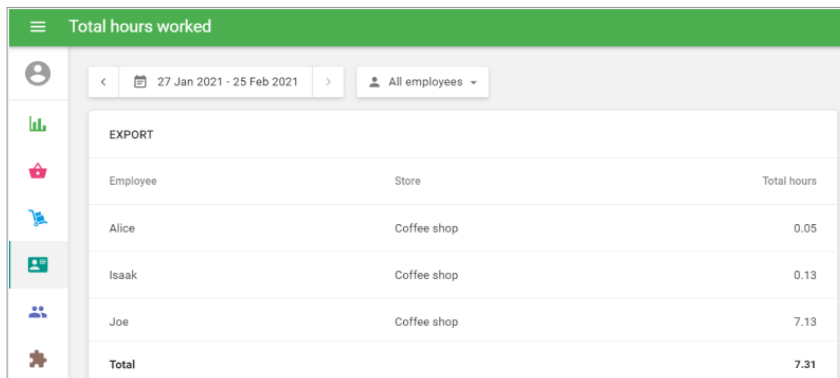
There are two sections in 'Employees' menu connected to Clock in/Clock out option: 'Timecards' and 'Total hours worked'.

1



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

2

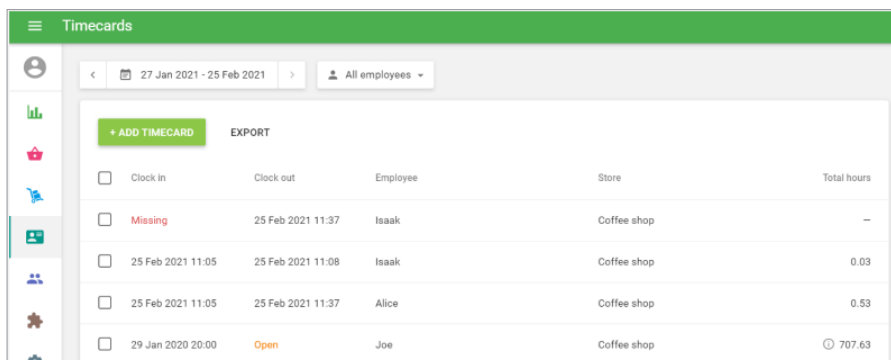


The screenshot shows the 'Total hours worked' section. It includes a sidebar with navigation icons and a main area with a date range selector (27 Jan 2021 - 25 Feb 2021) and an employee selector (All employees). Below this is an 'EXPORT' button and a table of employee hours.

Employee	Store	Total hours
Alice	Coffee shop	0.05
Isaak	Coffee shop	0.13
Joe	Coffee shop	7.13
<b>Total</b>		<b>7.31</b>

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

3



The screenshot shows the 'Timecards' section. It includes a sidebar with navigation icons and a main area with a date range selector (27 Jan 2021 - 25 Feb 2021) and an employee selector (All employees). Below this is an '+ ADD TIMECARD' button and an 'EXPORT' button. A table lists timecards with columns for clock in/out times, employee, store, and total hours.

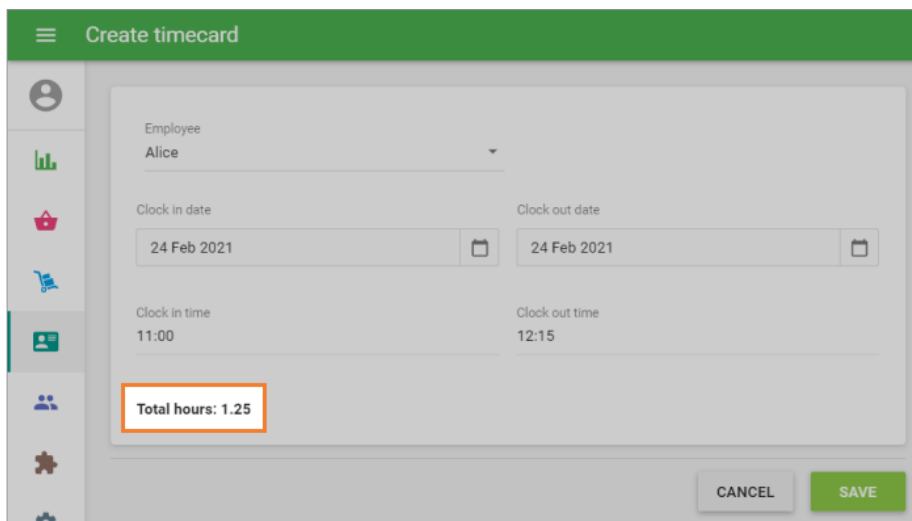
Clock in	Clock out	Employee	Store	Total hours
Missing	25 Feb 2021 11:37	Isaak	Coffee shop	—
25 Feb 2021 11:05	25 Feb 2021 11:08	Isaak	Coffee shop	0.03
25 Feb 2021 11:05	25 Feb 2021 11:37	Alice	Coffee shop	0.53
29 Jan 2020 20:00	Open	Joe	Coffee shop	707.63

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

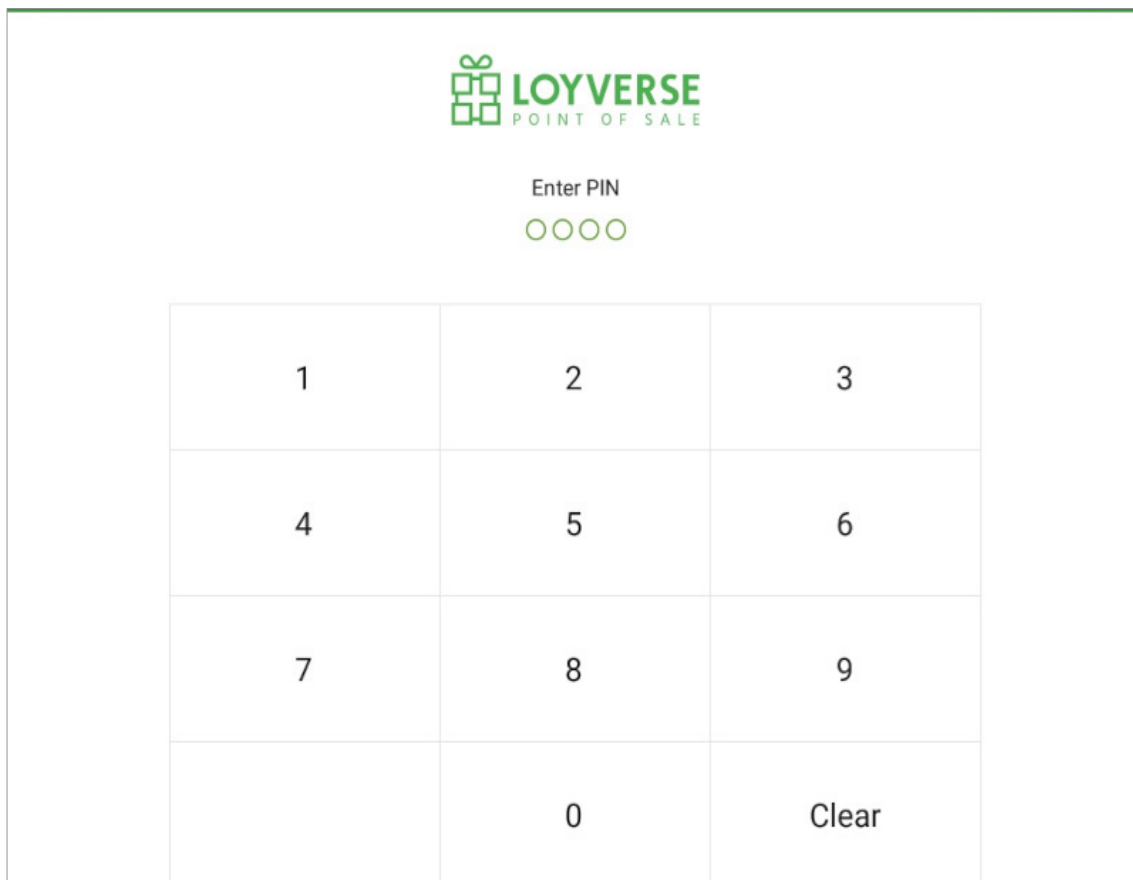


The screenshot shows the 'Create timecard' form. It includes a sidebar with navigation icons and a main area with a form to create a new timecard. The form has fields for Employee (Alice), Clock in date (24 Feb 2021), Clock out date (24 Feb 2021), Clock in time (11:00), and Clock out time (12:15). A 'Total hours: 1.25' field is highlighted with an orange box. At the bottom are 'CANCEL' and 'SAVE' buttons.

## 5.6 How to Manage PIN Code Access

PIN code is used for access to the Loyverse POS. The panel for entering PIN appears during each entry to the POS.

1



The image shows the Loyverse POS interface for entering a PIN. At the top is the Loyverse logo with the text 'LOYVERSE POINT OF SALE'. Below the logo is the text 'Enter PIN' followed by four empty circles for the PIN digits. Below this is a numeric keypad with buttons for digits 1 through 9, 0, and a 'Clear' button.

1	2	3
4	5	6
7	8	9
	0	Clear

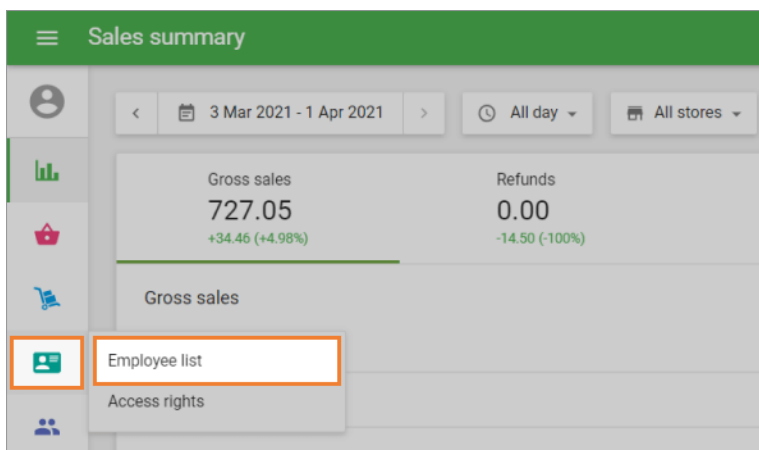
The PIN code is a 4-digit number unique for each Loyverse POS user - owner and employee and has an identification purpose.

The PIN access is set when adding a new employee.

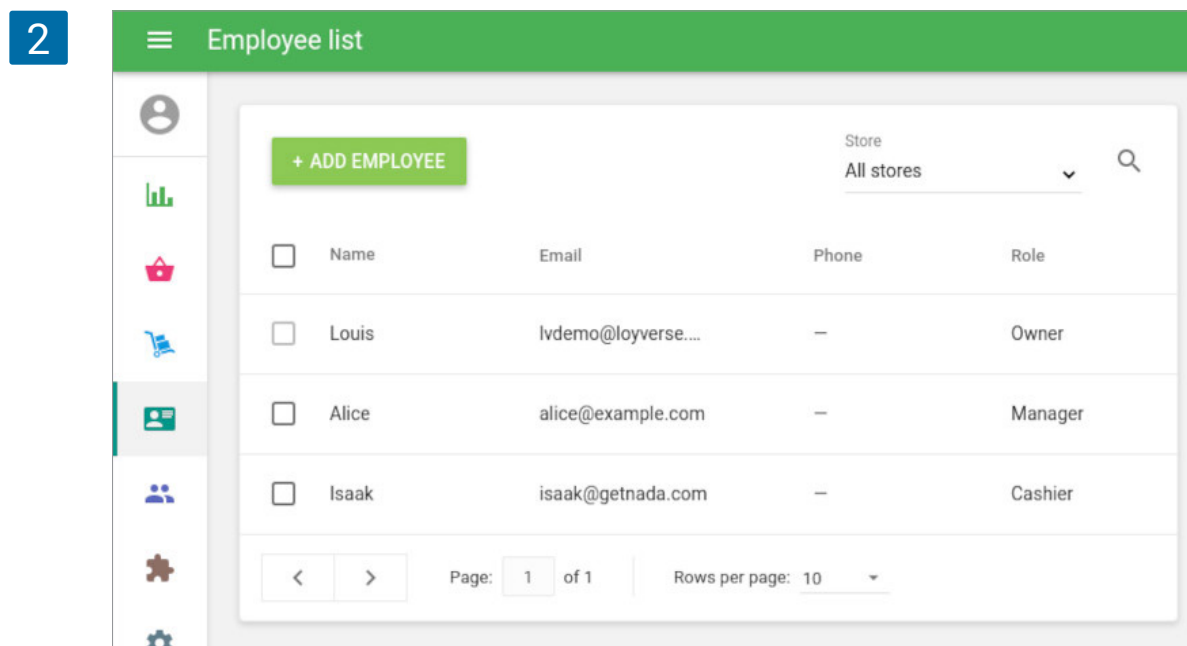
### 5.6.1 How to find and change the PIN

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

1



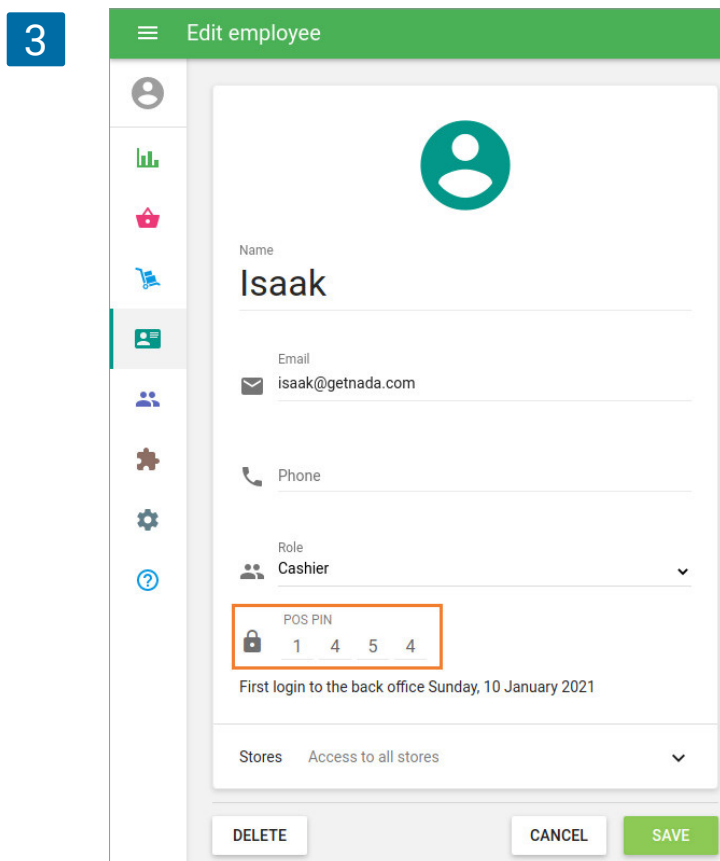
Select the employee that you want to manage the PIN.



In the POS PIN field, you can see the current employee's PIN. You can change it if needed.

#### Note

Any action with a PIN code can be done only by the owner or employees who have access to Back Office to the corresponding section.



Don't forget to save your changes.

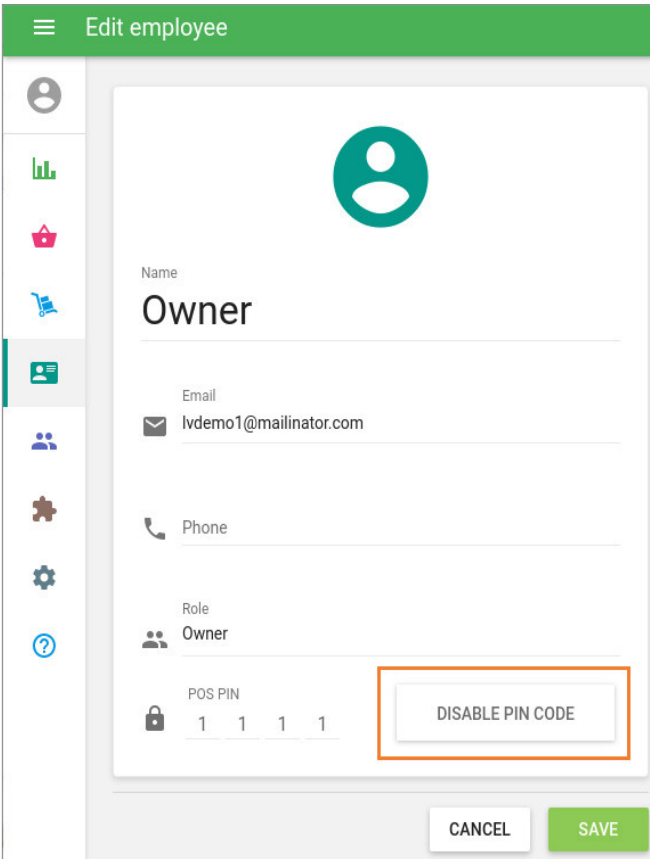


## 5.6.2 How to remove the PIN

**It is possible to enter POS without a PIN code only when there are no other users besides the owner. If you have at least one employee or the "Timeclock feature" enabled, the PIN code is obligatory for each user.**

In the Edit Employee form of the owner, tap the 'Disable PIN Code' button.

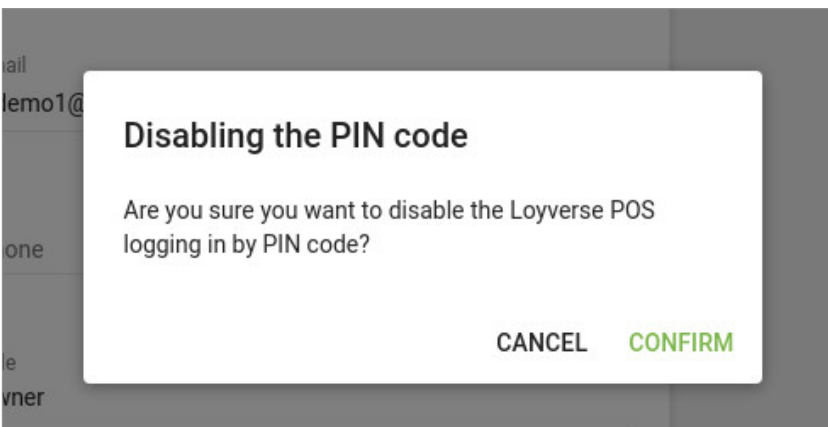
1



The screenshot shows the 'Edit employee' form for the owner. The form has a green header bar with a menu icon and the text 'Edit employee'. On the left is a vertical sidebar with various icons. The main content area contains the following fields: a profile picture placeholder, Name (Owner), Email (lvdemo1@mailinator.com), Phone, Role (Owner), and POS PIN (1 1 1 1). A button labeled 'DISABLE PIN CODE' is highlighted with an orange box. At the bottom of the form are 'CANCEL' and 'SAVE' buttons.

Confirm the disabling in the dialog window.

2



The screenshot shows a dialog window titled 'Disabling the PIN code'. The text inside asks: 'Are you sure you want to disable the Loyverse POS logging in by PIN code?'. At the bottom of the dialog are 'CANCEL' and 'CONFIRM' buttons.

At any time, you can restore the PIN code access for the owner through the 'Add PIN code' button.



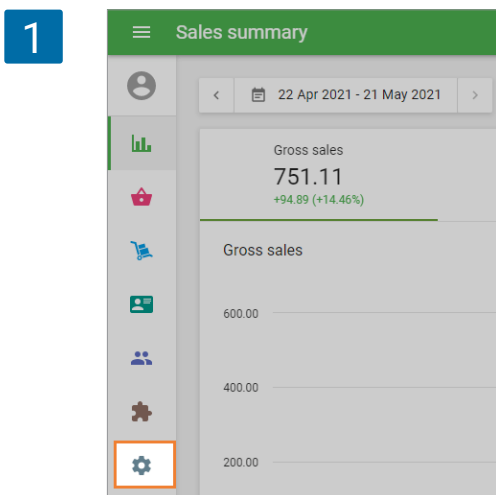
# 6. Customers



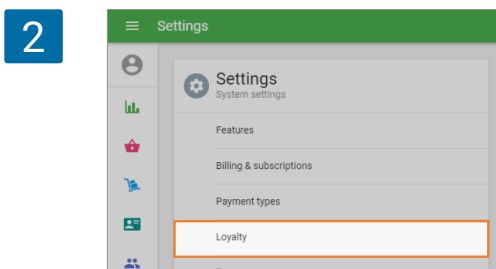
## 6.1 How to Set Up a Customer Loyalty Program

[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.

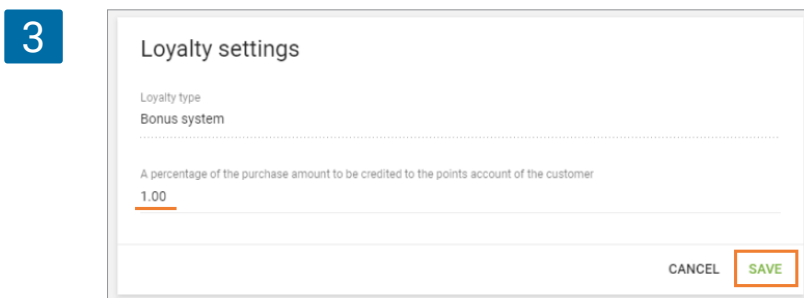
To set up the reward program, login to the Back Office.



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



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'.

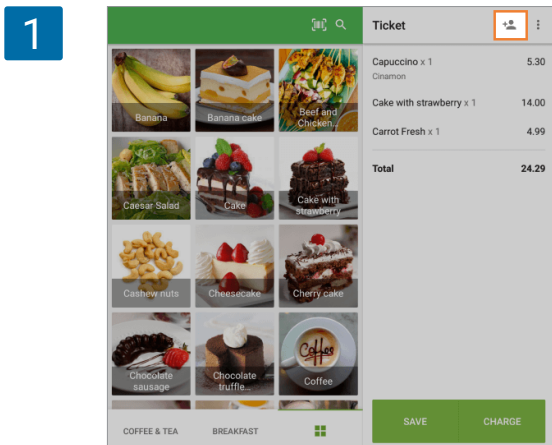


Your loyalty program is ready to go! All you need now are some customers! They'll be happy to know they can now collect bonus points at their favorite small business. Your store is well on its way to success!

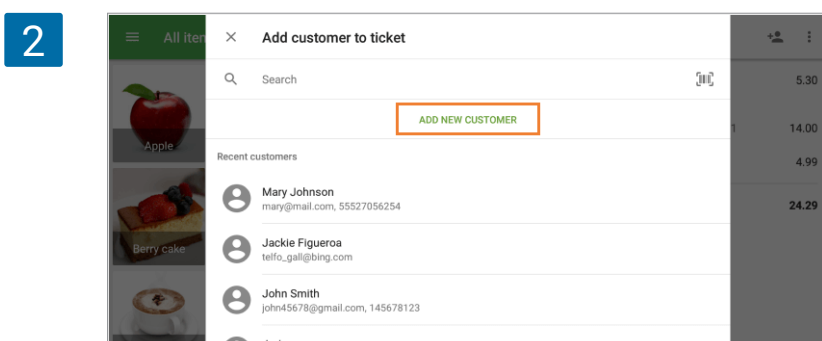
## 6.2 How to Sign Up a Customer in Loyverse POS

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.

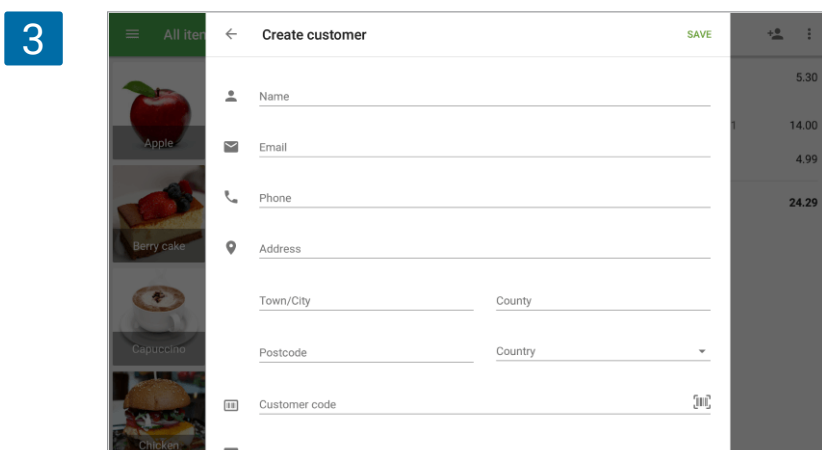
When [making sales](#) in the Loyverse POS app, you can sign up a new customer. Click the 'Add client' icon at the top right-hand corner of the sale screen.



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

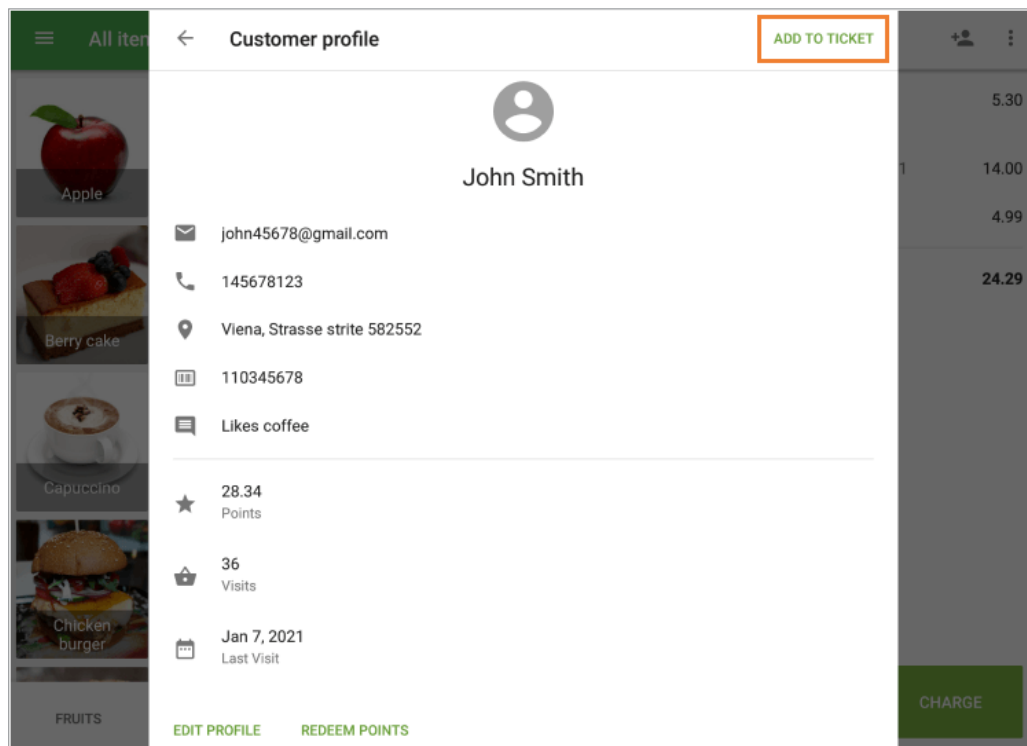


If you add a new customer, fill in the 'Create customer' form. You must fill in at least one of the fields: Name, Email, or Phone to identify a customer, and other fields are optional. Tap 'Save'.



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

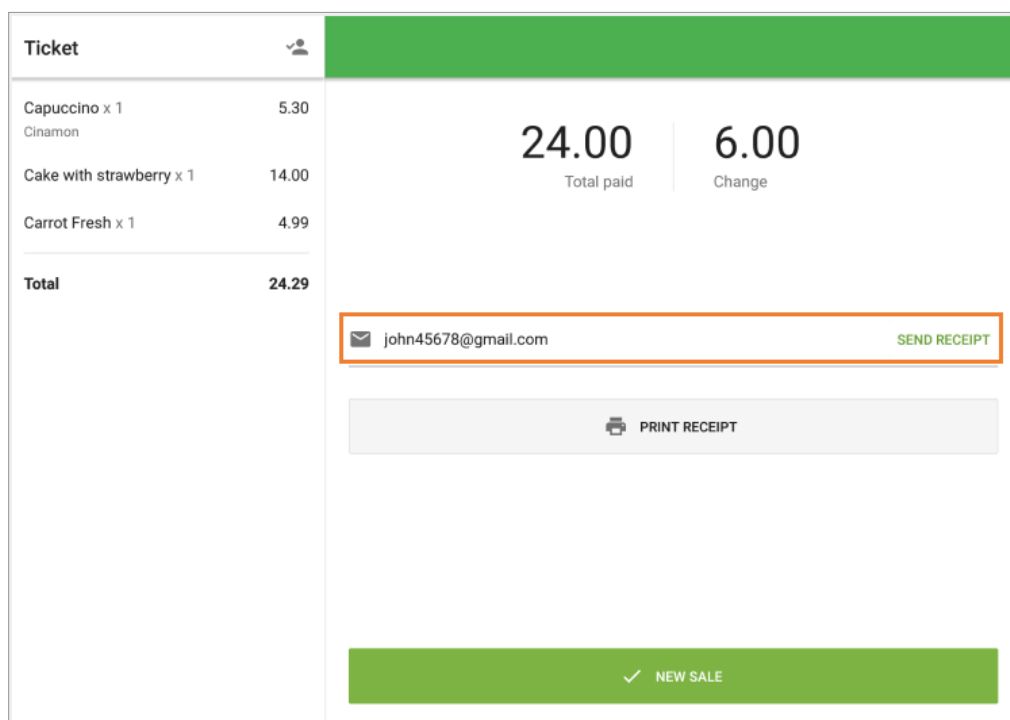
4



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.

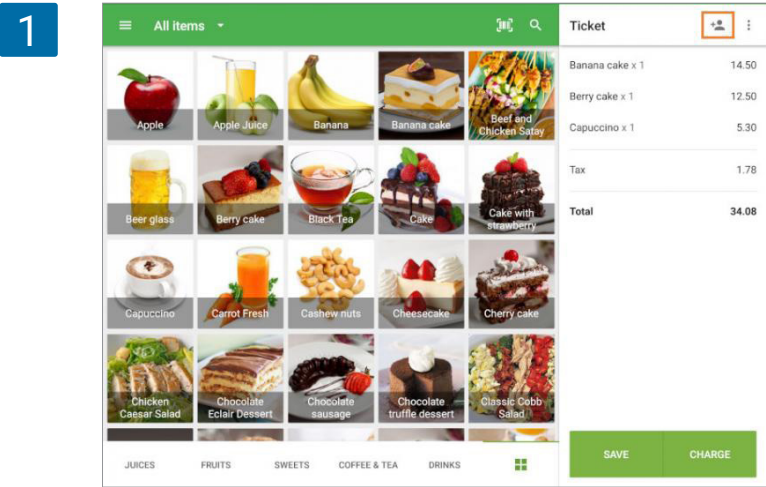
5



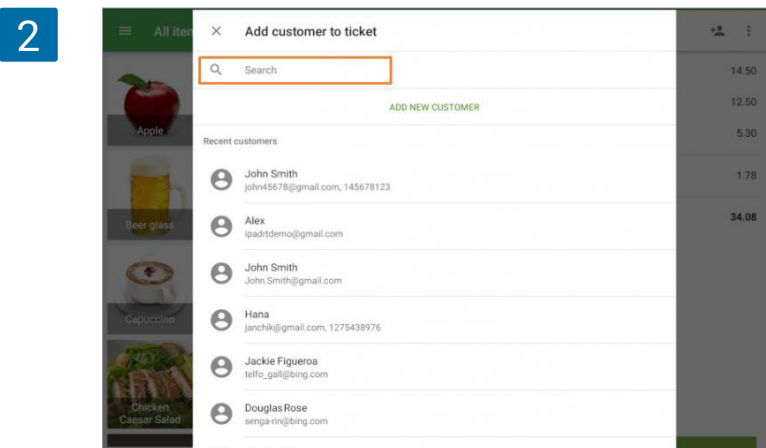
Tap the 'New sale' button to return to the sale screen.

# 6.3 How to Redeem Customer Points for a Discount

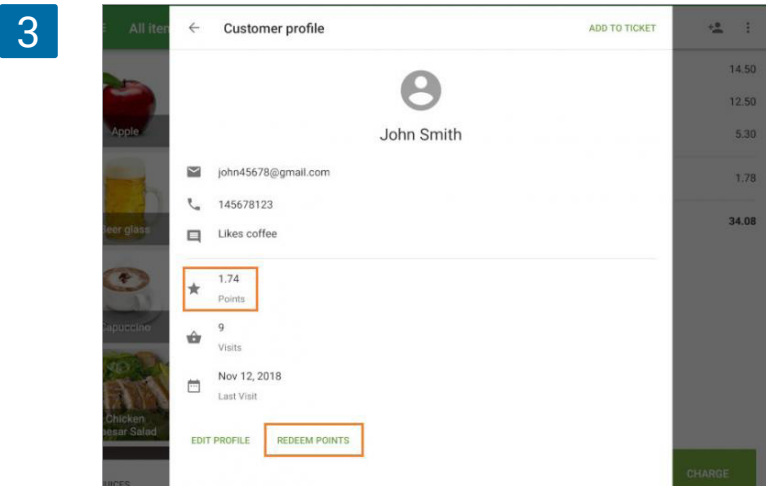
At the sale screen, add items to the ticket and click the 'Add client' icon at the top right-hand corner of the sale screen.



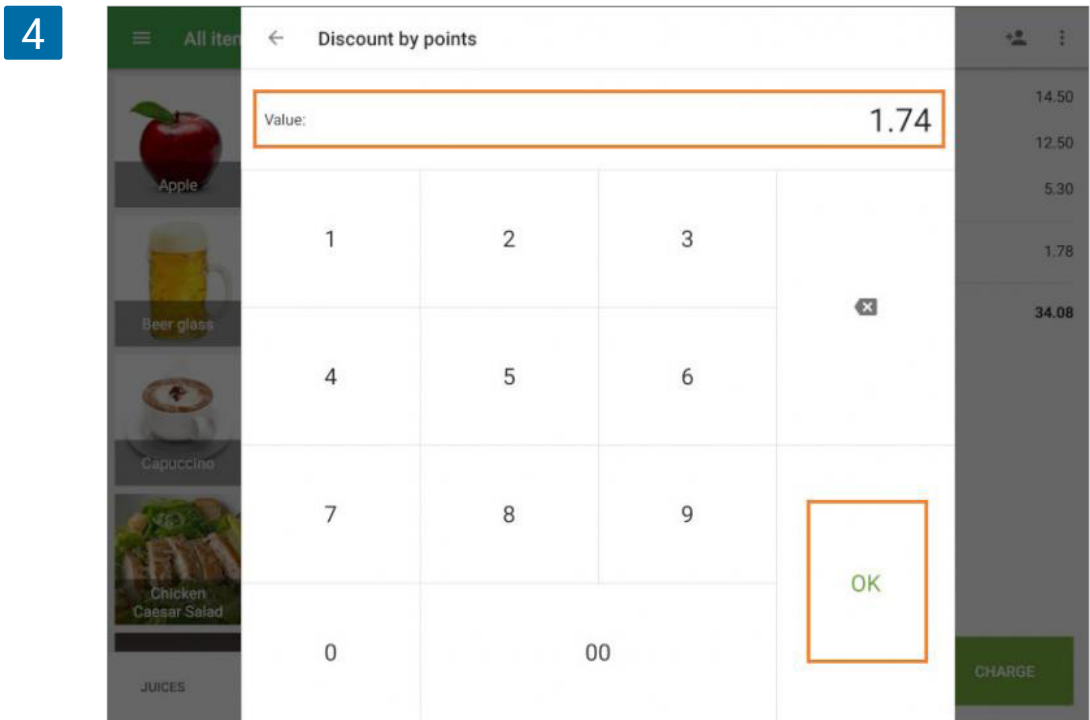
In the pop-up window, select the existing customer from the list of recent customers. You can use the search field to find the customer by name, email or number.



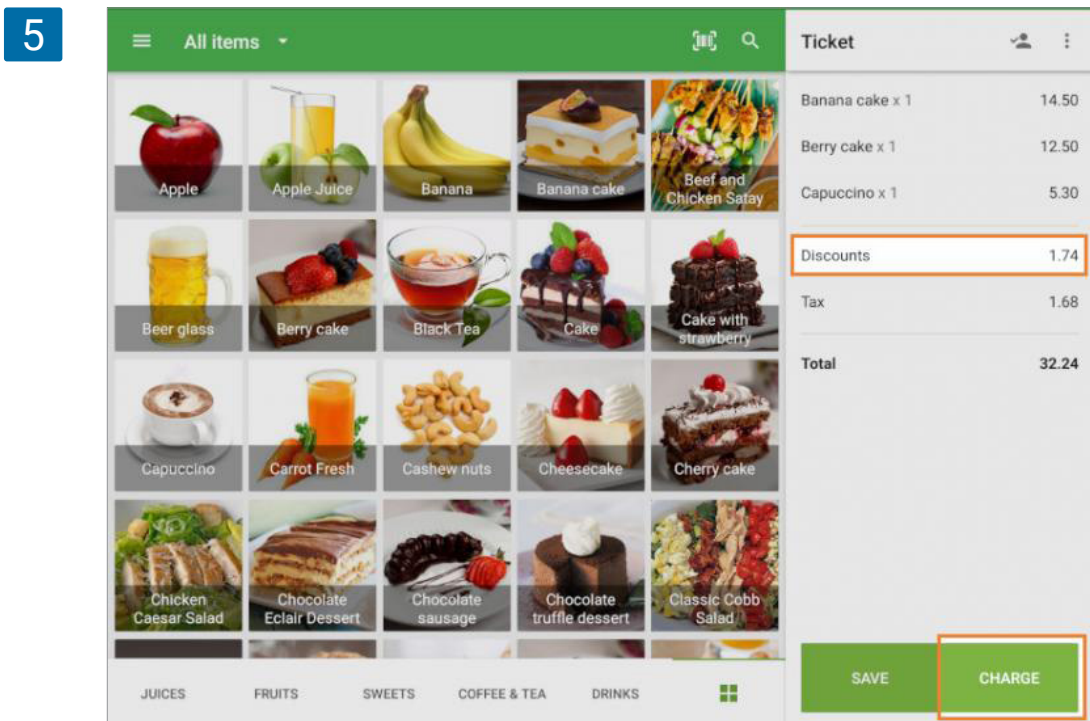
After you have selected the customer, you can see his/her profile with the number of points available for redemption. Tap 'Redeem points'



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.



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



## 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**

Ticket	
Dine in	
Chocolate truffle dessert x 1	8.50
Croissant x 1	2.25
Cream cake x 1	8.50
Tax	1.93
<b>Total</b>	<b>21.18</b>

21.18  
Total paid

0.00  
Change

Enter email SEND RECEIPT

PRINT RECEIPT

NEW SALE

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**

Ticket	
Dine in	
Chocolate truffle dessert x 1	8.50
Croissant x 1	2.25
Cream cake x 1	8.50
Tax	1.93
<b>Total</b>	<b>21.18</b>

21.18  
Total paid

0.00  
Change

Receipt sent to email

PRINT RECEIPT

NEW SALE

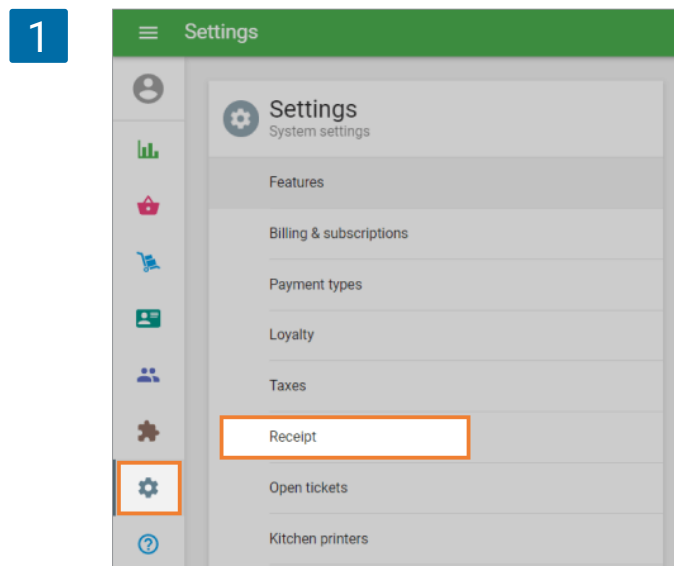
Note: The E-mail entered for sending the receipt will not be saved in the customer base.



## 6.5 Information about the Customer and Comments in the Receipt

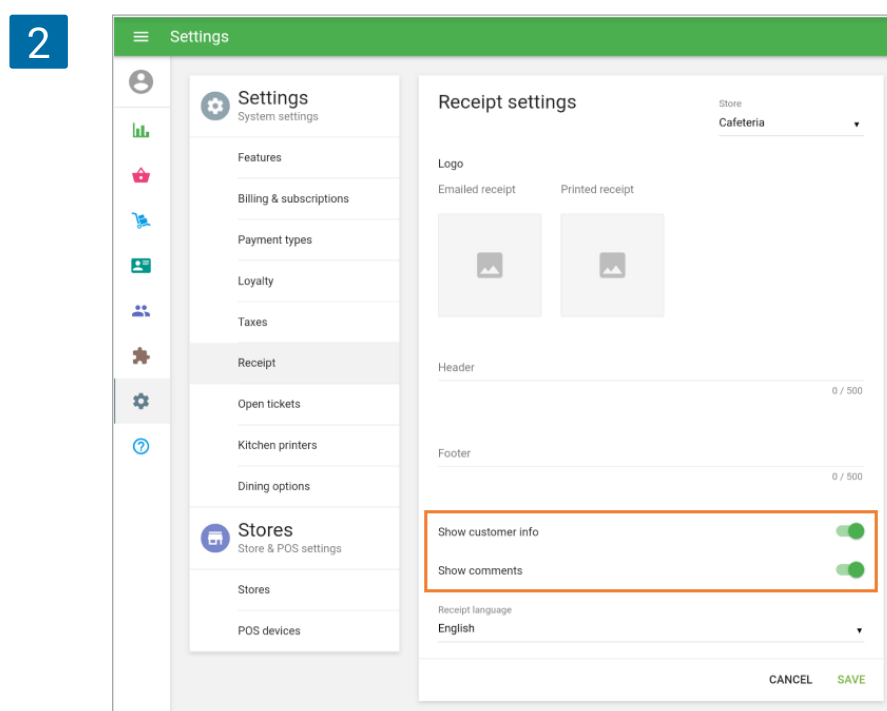
These settings only affect the display of information on the receipts for the clients, such as printed receipts, email receipts, and do not affect the format of receipts in the archive in POS and in the Back Office, where customer information and notes are always displayed.

Go to the 'Receipt' section in the 'Settings' menu in the Back Office.



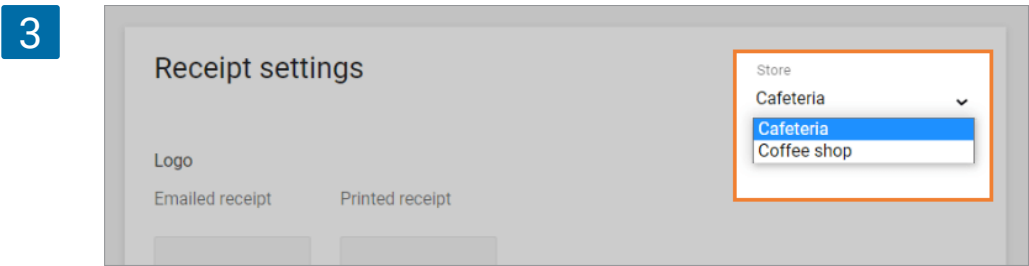
In the Receipt settings, switch on the 'Show customer info' option if you want to display the information of your registered customers on the receipts.

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

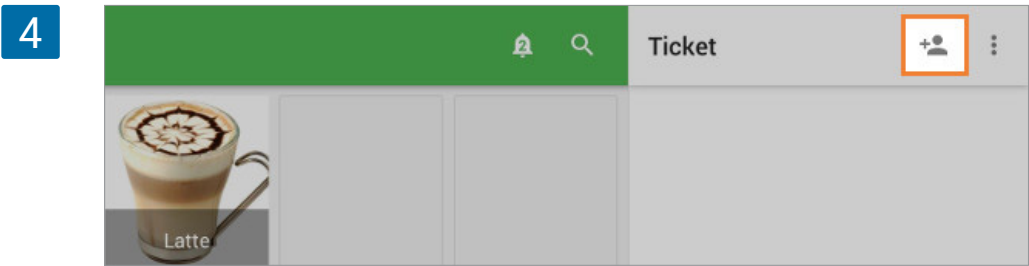


Don't forget to save your changes by clicking on the 'Save' button.

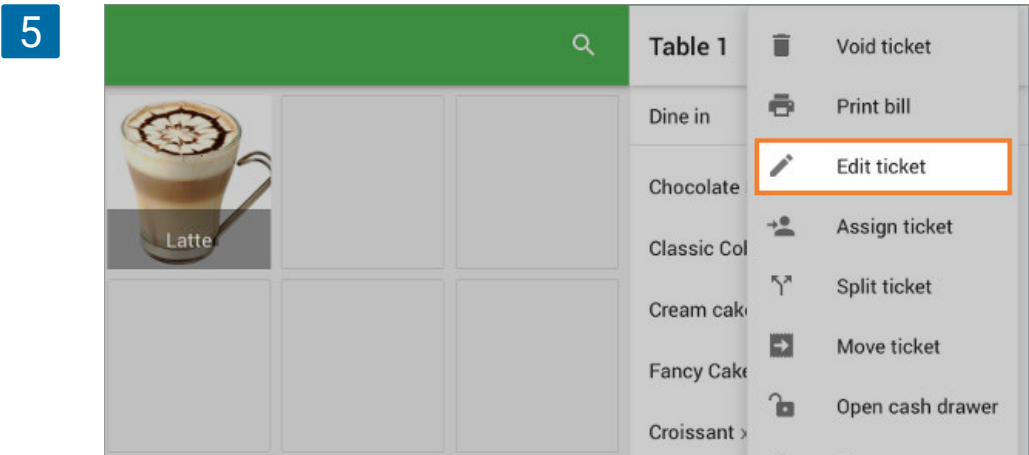
If you have several stores, you have to make these settings for each store by selecting the store's name from the drop-down list and saving changes.



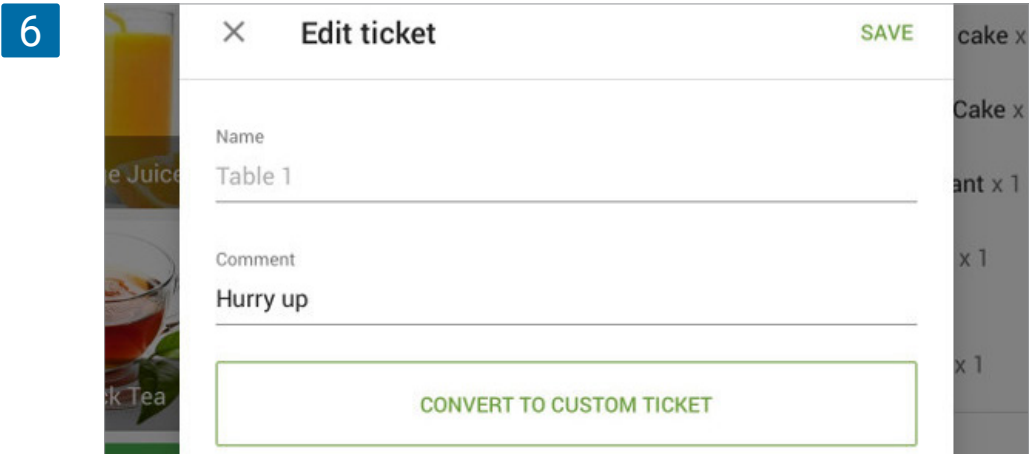
Now, during the sale, when you register a new customer or assign a ticket to an existing customer, the customer name and number will be printed on the receipt.



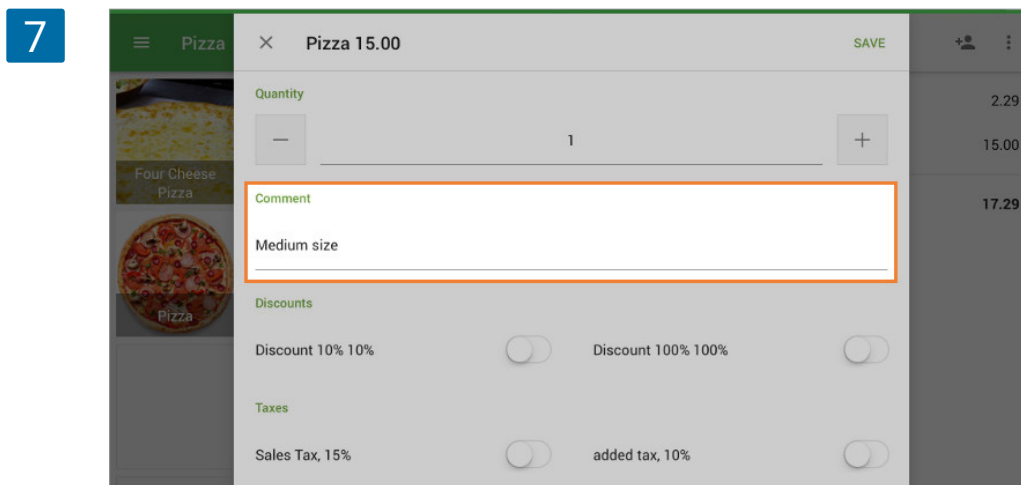
You can **add comments to the open ticket** by tapping on the 'Edit ticket' button under the menu (:).



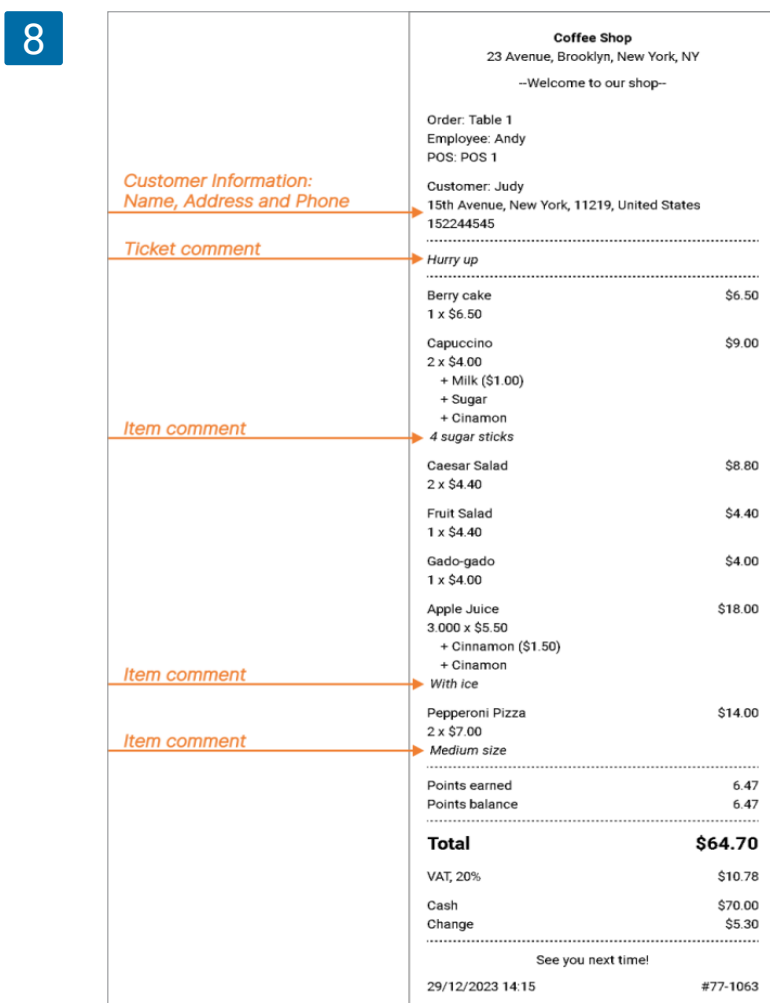
Type in the comment on the pop-up window and tap 'Save'.



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'.



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.



### Note

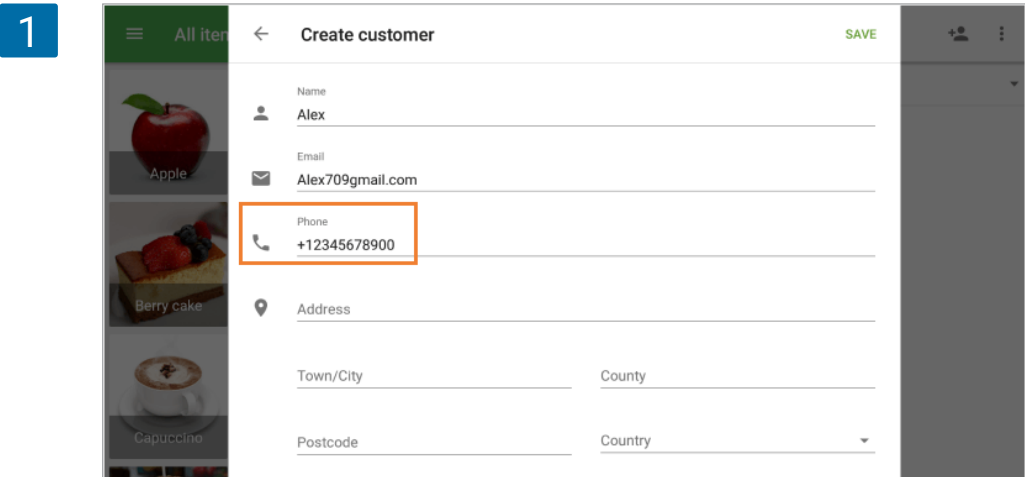
The item comments will be displayed on the refund receipt, but the ticket comments will not.

# 6.6 Customer Identification by Phone Number

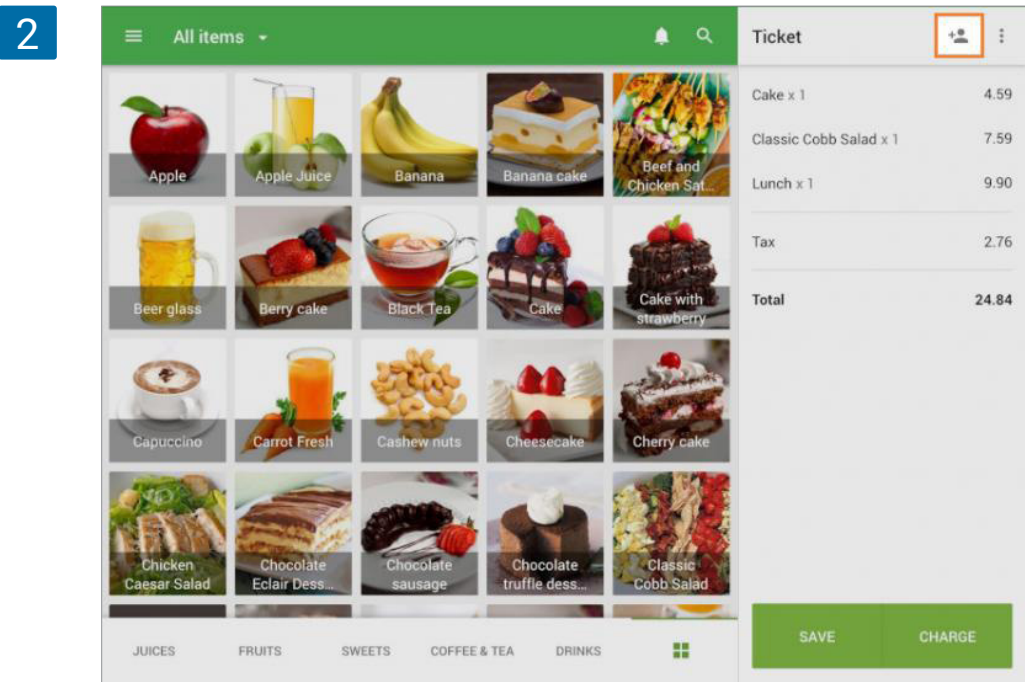
If you specify a customer’s phone number when you [sign up a customer in Loyverse POS](#), you can identify your customer by their number during a sale.

Note

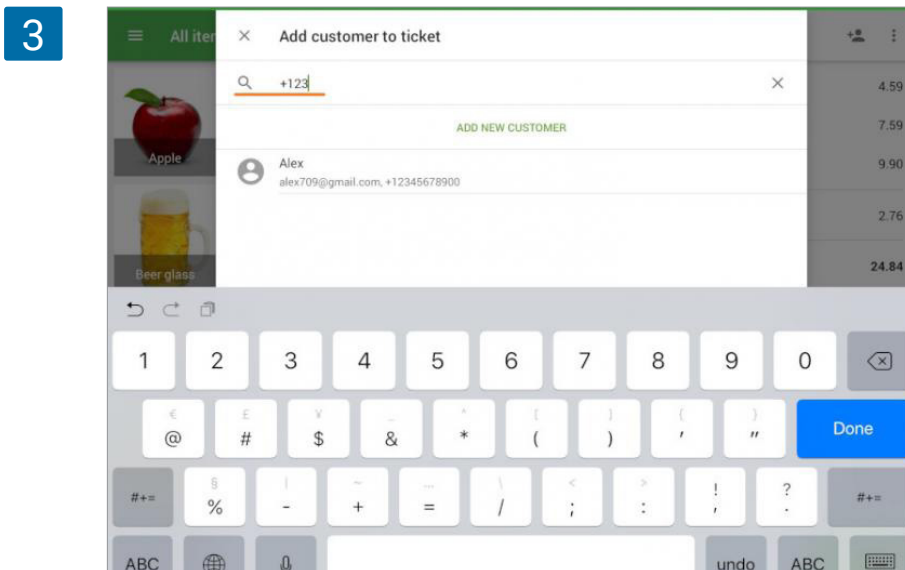
For customer registration, it may be enough to fill only one of the three fields: ‘Name’, ‘Phone’ or ‘Email’. But sometimes, the customer’s name is not unique. If you create multiple clients with the same name, it will be difficult to find the correct one. Therefore, we recommend you to fill in the fields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



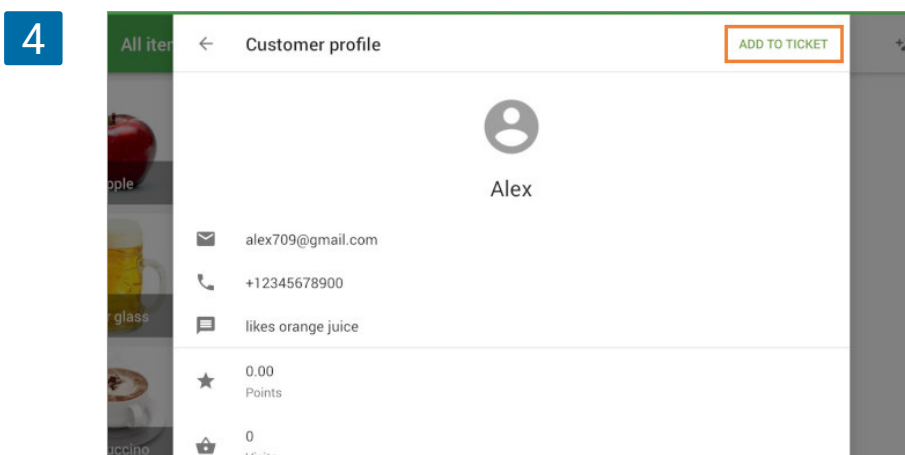
During a sale, tap the ‘Add client’ icon in the upper right corner of the screen.



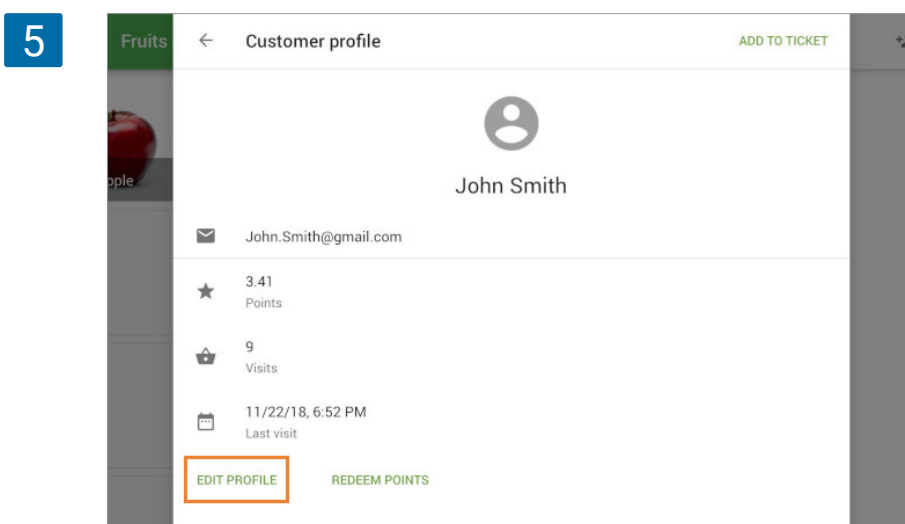
In the 'Search' field, start typing the customer's phone number that you wish to find. Select your customer from the list.



Tap 'Add to the ticket' button to connect the customer to the ticket.

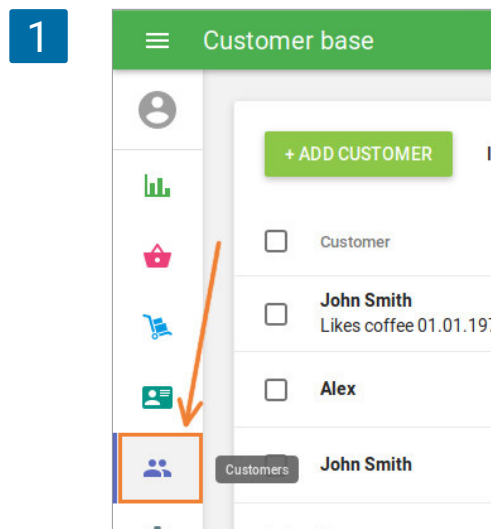


The phone number can be assigned not only to new customers but also to clients created earlier. To do this, find the card of the customer, tap 'Edit profile' and edit it by specifying the phone number.

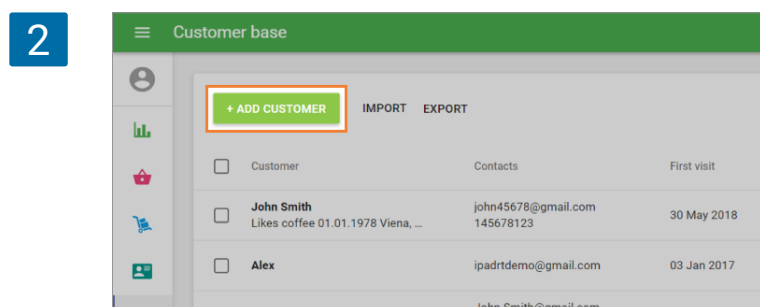


## 6.7 How to Work with Customer Base in the Back office

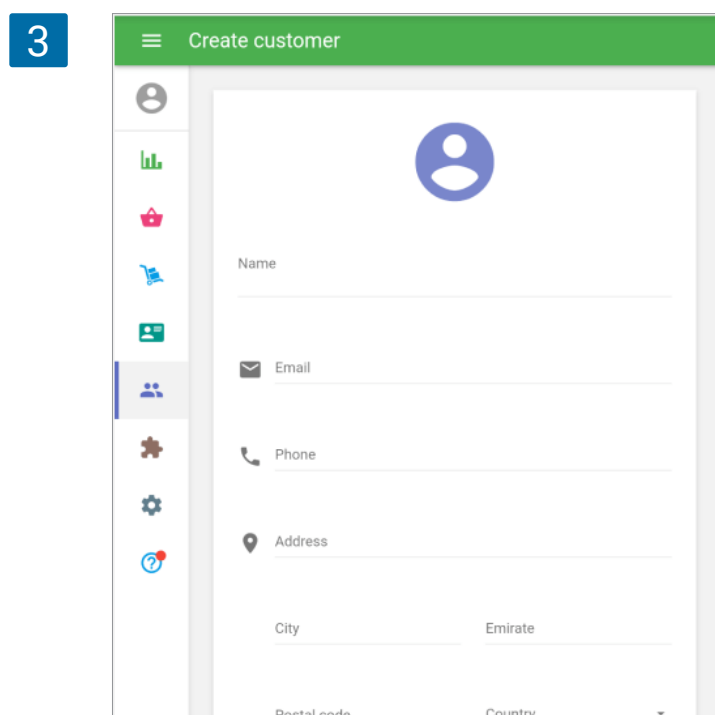
Enter the Back Office and open your 'Customer base'.



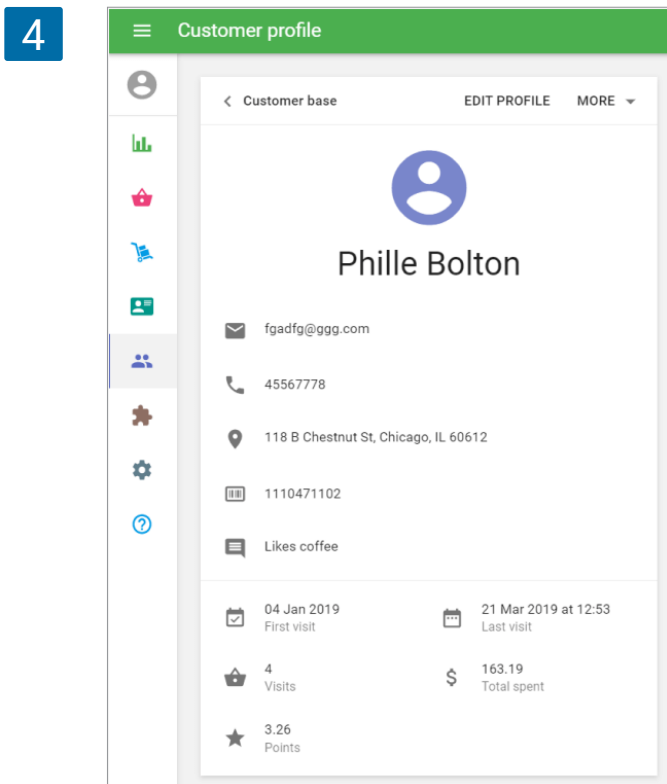
To create a new customer, click on the '+ Add customer' button.



The form 'Create customer' will open for editing.

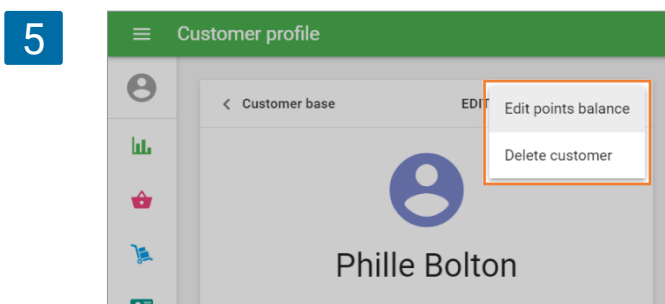


You cannot create a client without filling in one of the fields: Name, Phone or Email. You can also make some notes about the customer. After clicking on the 'Save' button, the Customer profile will be created.

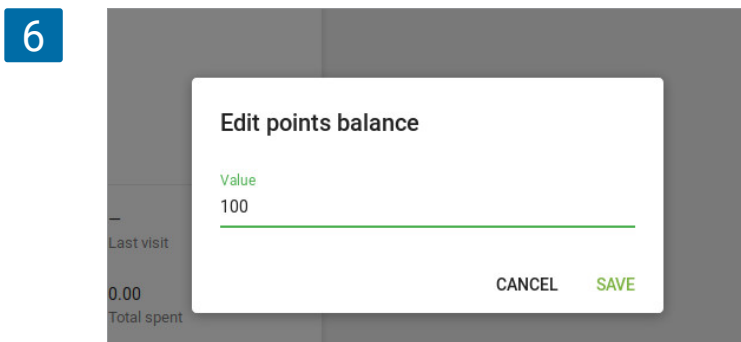


By clicking on the 'Edit profile', you can change the name, phone number, address, customer code and note.

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

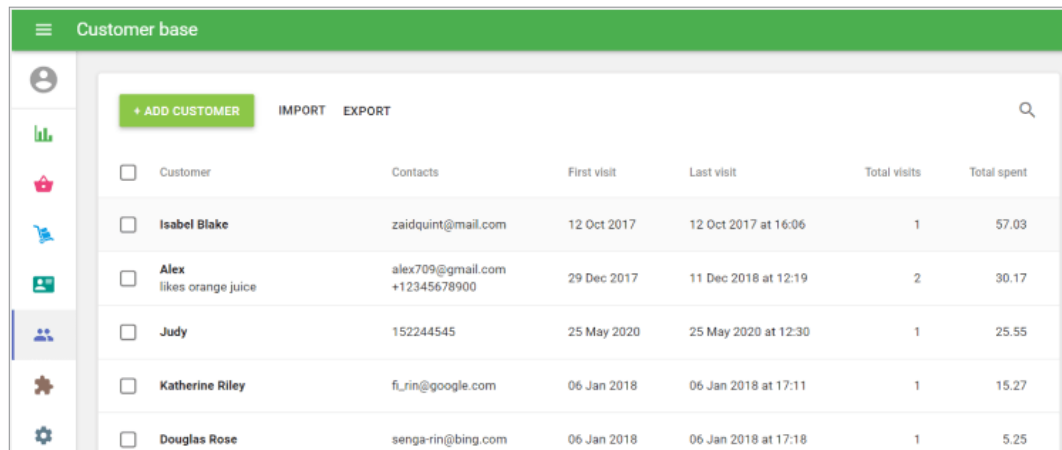


You can enter new points balance in the pop-up 'Edit points balance' form and click 'Save'.



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

7



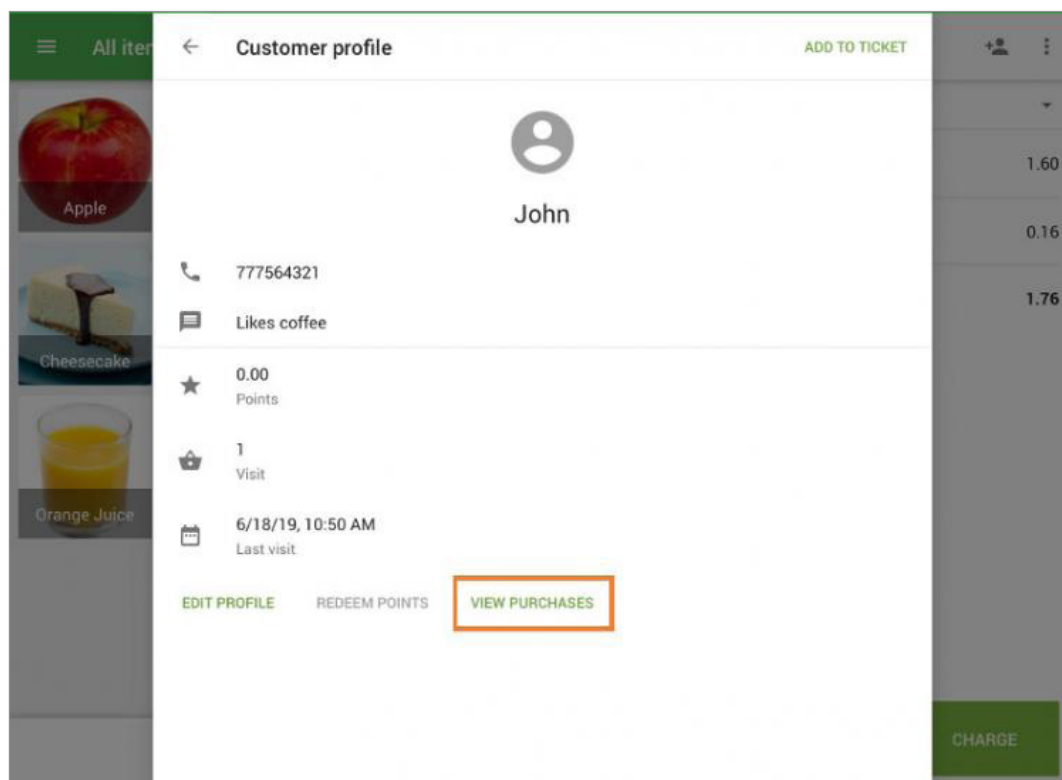
<input type="checkbox"/>	Customer	Contacts	First visit	Last visit	Total visits	Total spent
<input type="checkbox"/>	Isabel Blake	zaidquint@mail.com	12 Oct 2017	12 Oct 2017 at 16:06	1	57.03
<input type="checkbox"/>	Alex likes orange juice	alex709@gmail.com +12345678900	29 Dec 2017	11 Dec 2018 at 12:19	2	30.17
<input type="checkbox"/>	Judy	152244545	25 May 2020	25 May 2020 at 12:30	1	25.55
<input type="checkbox"/>	Katherine Riley	fi_rin@google.com	06 Jan 2018	06 Jan 2018 at 17:11	1	15.27
<input type="checkbox"/>	Douglas Rose	senga-rin@bing.com	06 Jan 2018	06 Jan 2018 at 17:18	1	5.25

## 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.

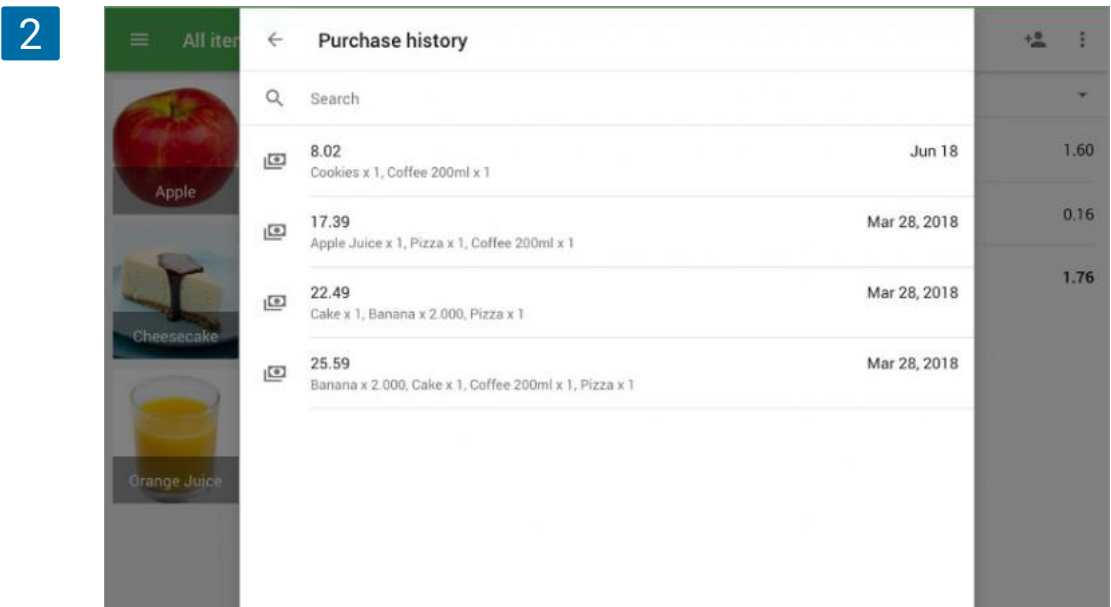
When making sales in the Loyverse POS app, add [registered customer](#) to the ticket. To see the purchase history of the customer, just tap the button “View purchases” on the customer profile.

1

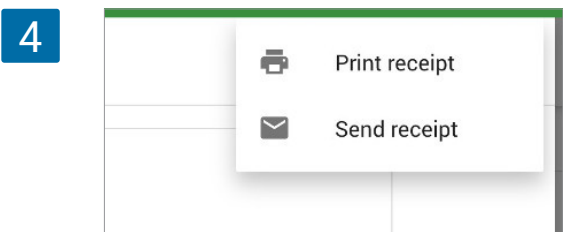
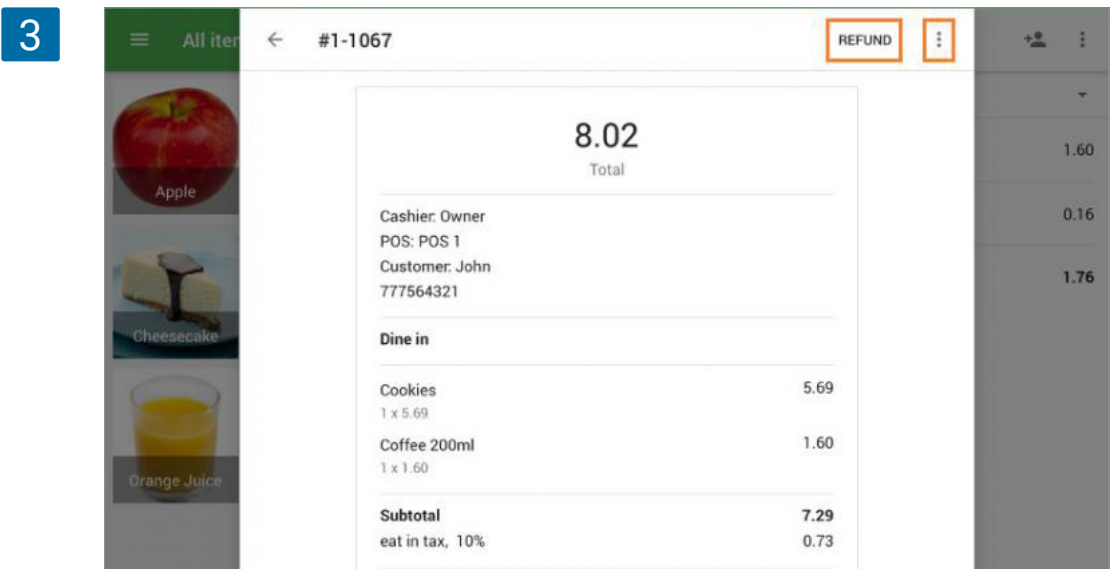




You will see the list of past receipts issued from this store, connected to the customer. Select to see details.



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).



### Note

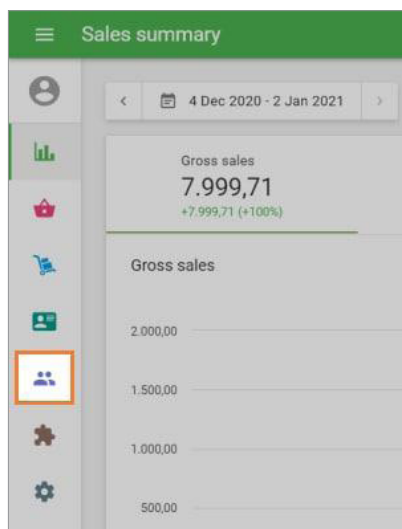
If there is no internet connection, you will only be able to see receipts with this client that were downloaded (to the device's memory storage) prior to viewing the archive of receipts.

## 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.

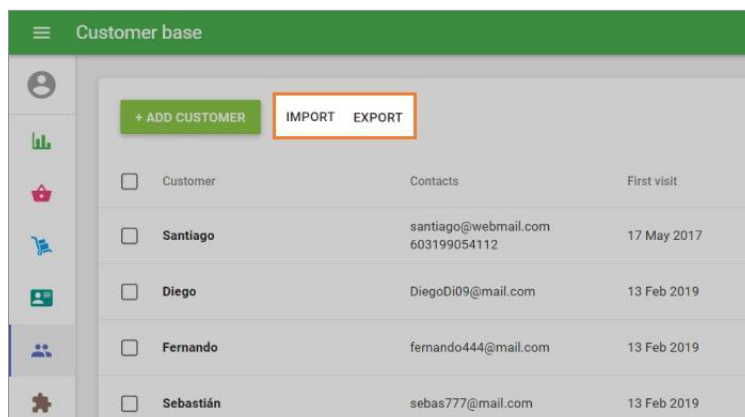
Enter the Back Office and open the 'Customers' menu.

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.

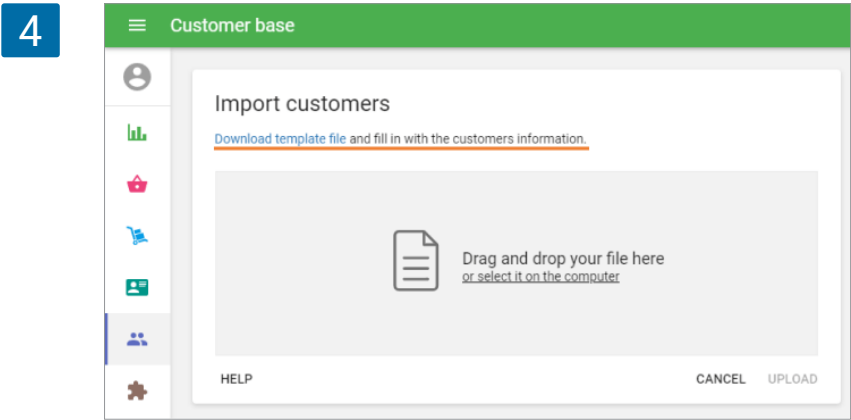
Now you can open your file, edit the customer list, and import it back to the system.

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		Grat. Eulalio Gutiérrez 1258,	Zona Centro,	25000 S
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'.

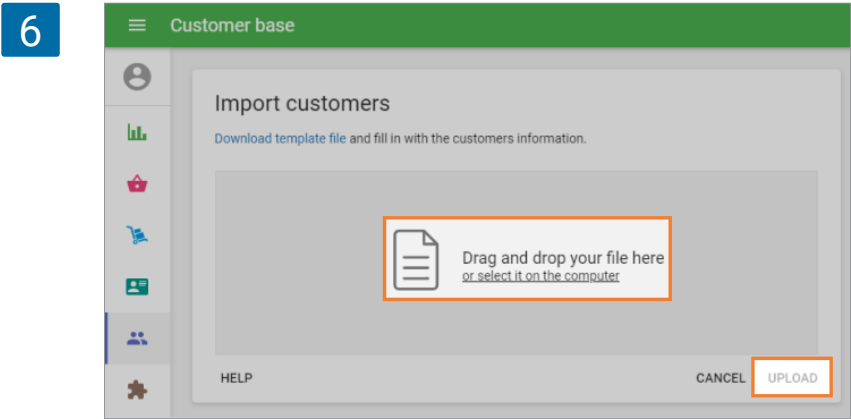


Open your template file and fill up new customer information in the specified columns. If you are missing some information, you may leave the cell blank. Do not delete the column names from the first row or change their place.

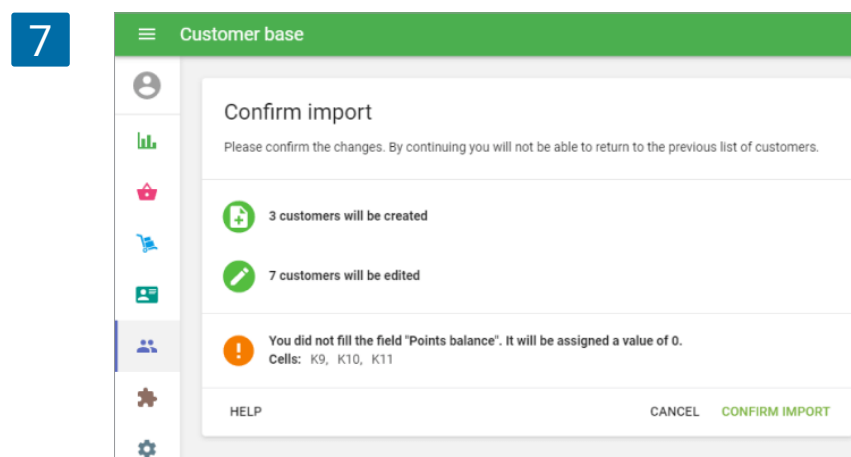
5

	A	B	C	D	E	F
1	Customer ID	Customer name	Email	Number	Points balance	Note
2		Angels Hicks	<a href="mailto:courowa_we@toodles.com">courowa_we@toodles.com</a>			
3		Estelles Chapman	<a href="mailto:elu_redofnd@infoseller.com">elu_redofnd@infoseller.com</a>			
4		Noahs Francis	<a href="mailto:Malla-thi@bing.com">Malla-thi@bing.com</a>			
5		Daniels Cunningham	<a href="mailto:dea_lfayd@google.com">dea_lfayd@google.com</a>			
6		Devins Peterson	<a href="mailto:mauif_sim@yahoo.com">mauif_sim@yahoo.com</a>			
7		Adrians Cox	<a href="mailto:anstfice_buse@yahoo.com">anstfice_buse@yahoo.com</a>			
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.



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

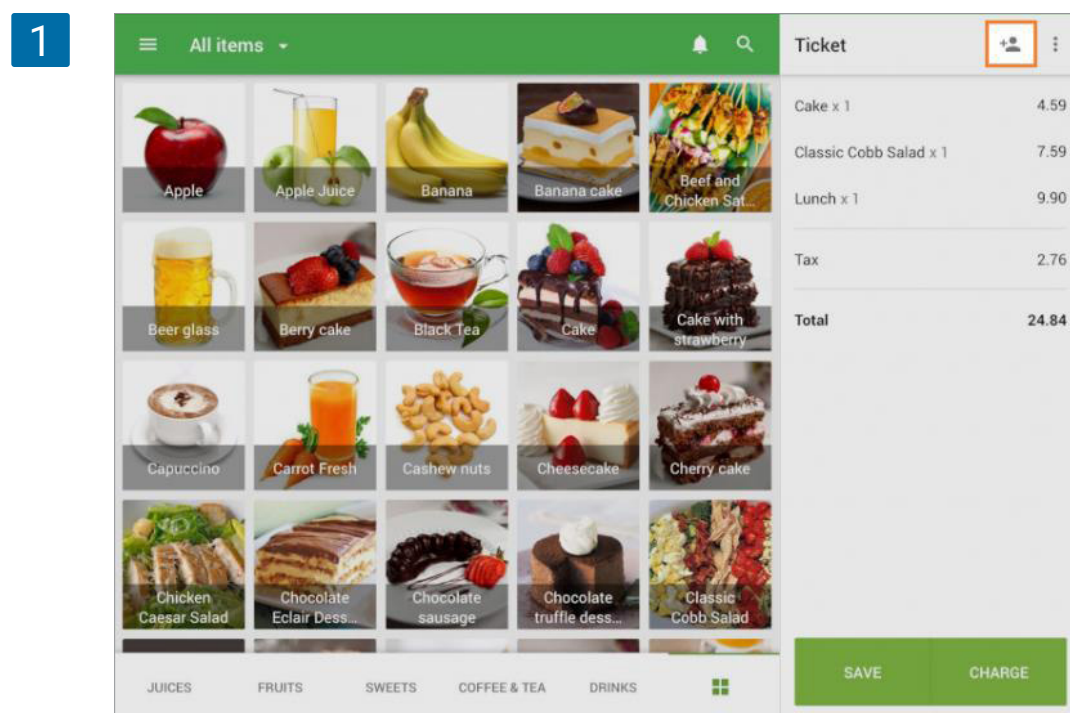


After confirming, the customer base will be renewed with the added customers or any changes to existing ones.

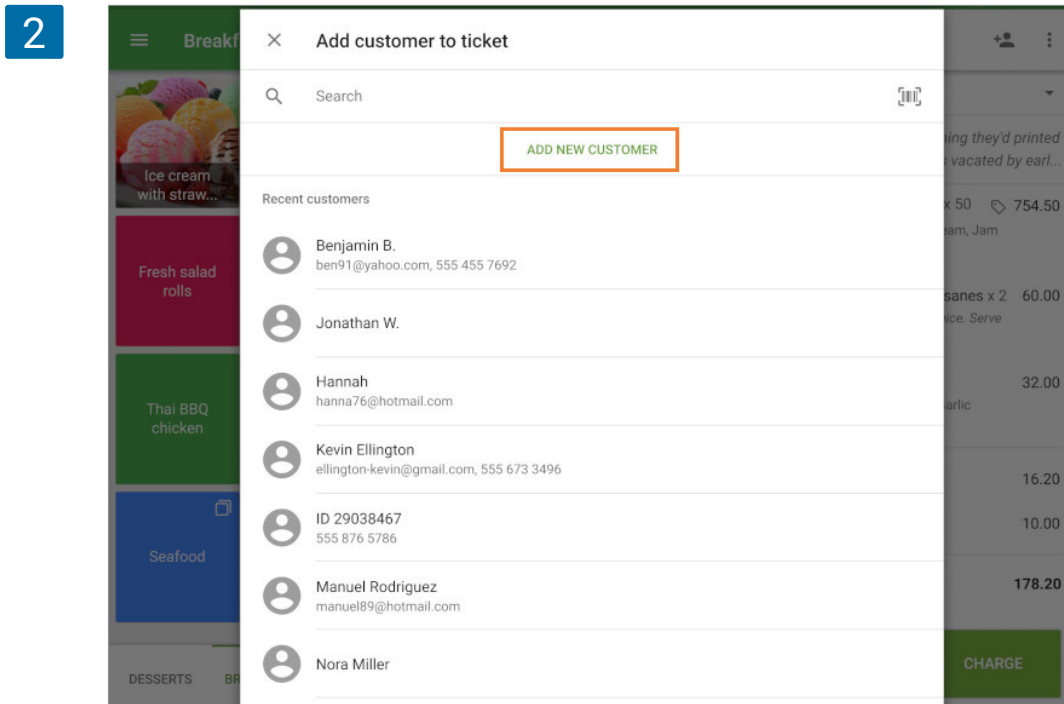
## 6.10 How to Add the Customer to the Receipt by Scanning a Barcode

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.



Tap on 'Add new customer.'



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

The screenshot shows the 'Create customer' form. It has a back arrow and a 'SAVE' button at the top right. The form fields are: Name, Email, Phone, Address, City, Province, Postal code, Country, Customer code, and Note. The 'Customer code' field is highlighted with an orange rectangle and has a barcode scanner icon on the right.

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

4

Create customer

Name

Email

Phone

Address

Town/City County

Postcode Country

Customer code

Note 0 / 255

CANCEL SAVE

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

Breakfast

Add customer to ticket

Search

ADD NEW CUSTOMER

Recent customers

- Benjamin B.  
ben91@yahoo.com, 555 455 7692
- Jonathan W.
- Hannah  
hanna76@hotmail.com
- Kevin Ellington  
ellington-kevin@gmail.com, 555 673 3496
- ID 29038467  
555 876 5786
- Manuel Rodriguez  
manuel89@hotmail.com

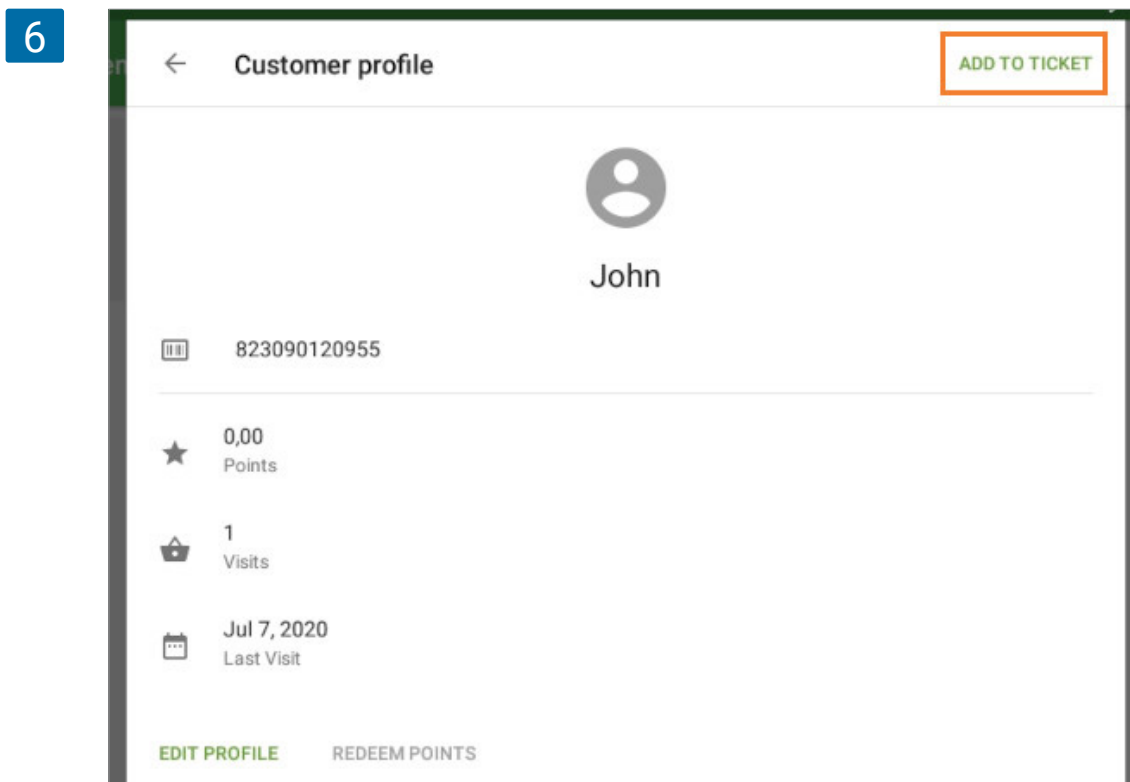
Ice cream with straw...

Fresh salad rolls

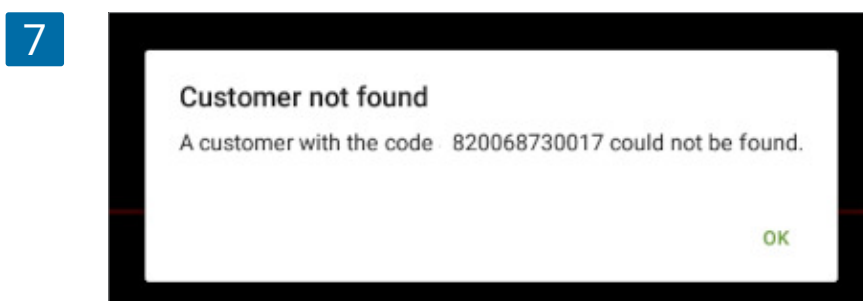
Thai BBQ chicken

Seafood

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



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



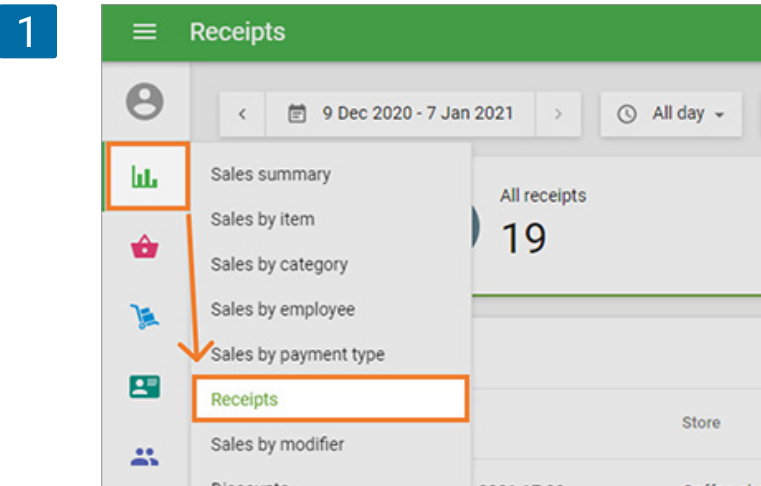
#### Note

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

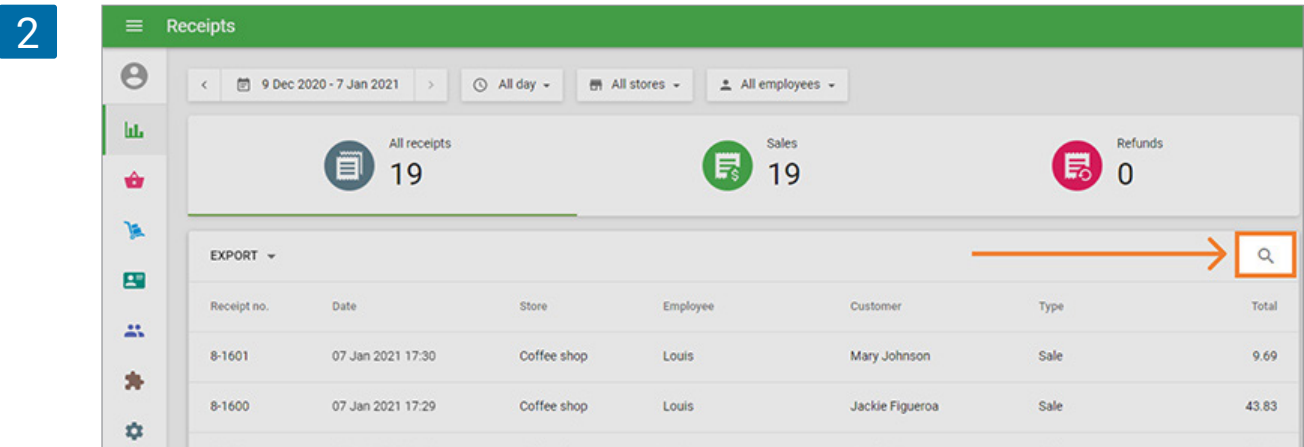
# 6.11 How to See the Purchase History of Registered Customers at the Back Office

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.

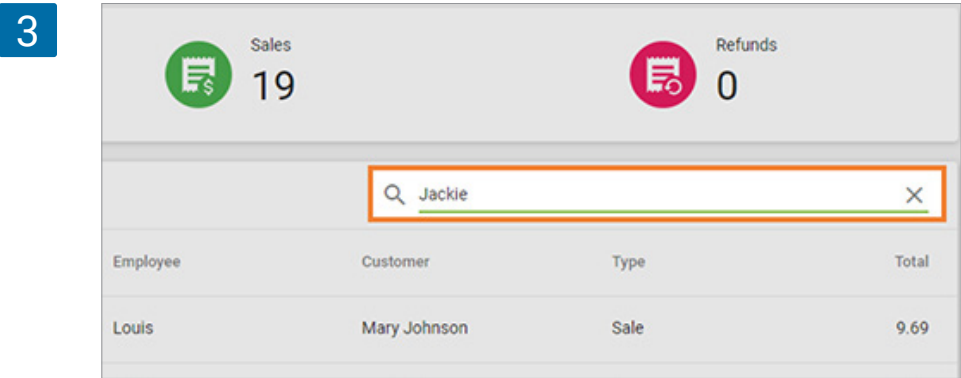
In the Back Office, go to the 'Receipts' section.



Click on the search icon.



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





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

4

Receipt no.	Date	Store	Employee	Customer	Type
8-1600	07 Jan 2021 17:29	Coffee shop	Louis	Jackie Figueroa	Sale
8-1599	07 Jan 2021 17:29	Coffee shop	Louis	Jackie Figueroa	Sale
8-1598	07 Jan 2021 17:28	Coffee shop	Louis	Jackie Figueroa	Sale
11-1013	06 Jul 2017 22:46	Coffee shop	Louis	Jackie Figueroa	Sale
1497	31 Dec 2015 19:00	Coffee shop	Louis	Jackie Figueroa	Sale

Dine in	
Carrot Fresh 1 x 4.99	4.99
Cake 1 x 4.59	4.59
Croissant 1 x 2.25	2.25
Points balance	10.65
<b>Total</b>	<b>11.83</b>
Cash rounding	-0.17
Cash	12.00

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

Receipt no.	Date	Store	Employee	Customer	Type	Total
8-1601	07 Jan 2021 17:30	Coffee shop	Louis	Mary Johnson	Sale	9.69
8-1600	07 Jan 2021 17:29	Coffee shop	Louis	Jackie Figueroa	Sale	43.83
8-1599	07 Jan 2021 17:29	Coffee shop	Louis	Jackie Figueroa	Sale	32.99
8-1598	07 Jan 2021 17:28	Coffee shop	Louis	Jackie Figueroa	Sale	11.83

[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
19/12/2020 10:1	11-1424	Sale	18.59	0.00	18.59	0.00	0.00	18.59	11.70	6.89
18/12/2020 13:3	11-1423	Sale	14.29	0.00	14.29	0.93	0.00	15.22	4.71	9.58
18/12/2020 13:3	11-1422	Sale	27.30	0.00	27.30	1.45	0.00	28.75	4.71	22.59
18/12/2020 13:3	11-1421	Sale	46.48	0.00	46.48	0.00	0.00	46.48	7.50	38.98

7

8182

9

## 6.12 How to Delete Customers from the Base

1

2

183

3



### 6.13.1 Install Loyverse CDS app

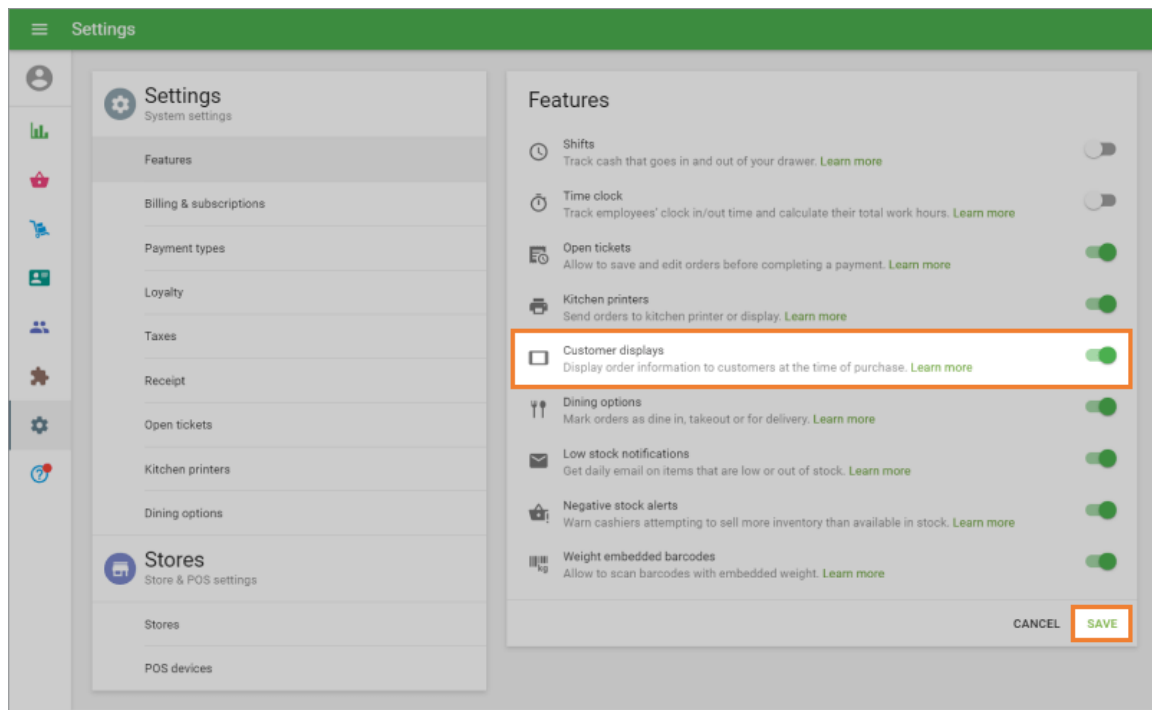
Launch the app, and you will see the Loyverse CDS welcome screen. The 'IP Address' and 'Device name' of your device will be displayed, which are the information needed for paring CDS with Loyverse POS.



## 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



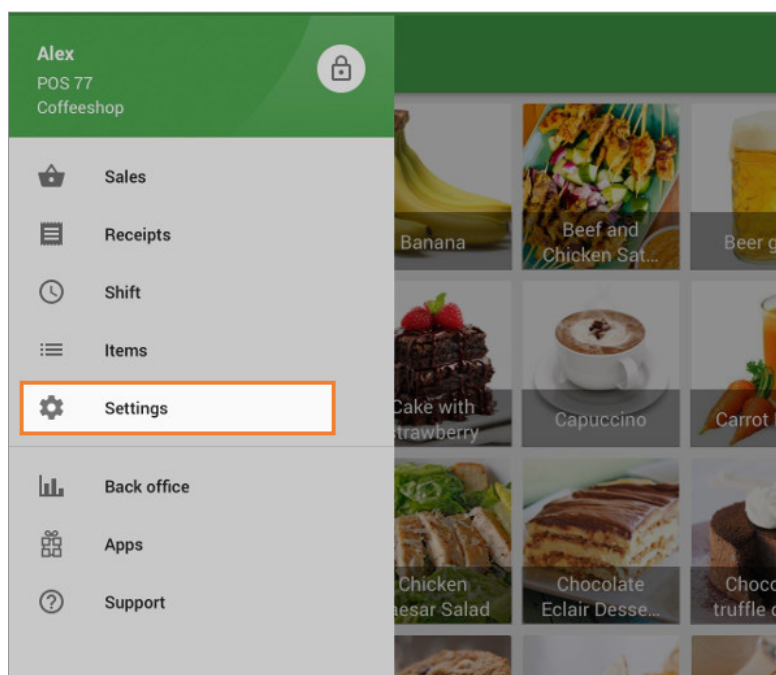
Don't forget to save changes.

## 6.13.3 Pair customer display with Loyverse POS

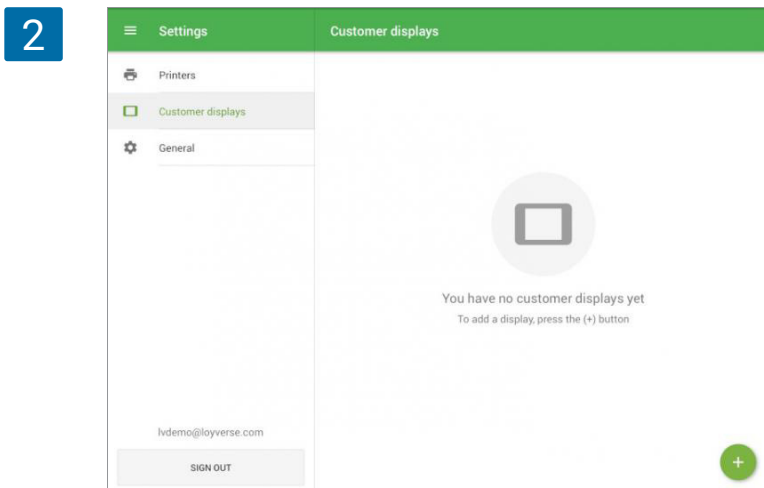
First, make sure that the mobile devices with Loyverse CDS and Loyverse POS are connected to the same Wi-Fi router and the same network.

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

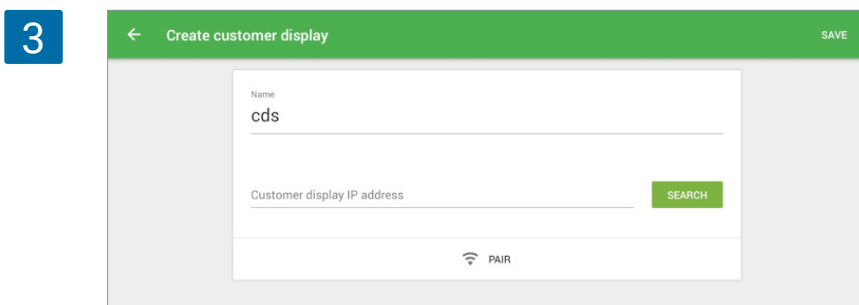
1



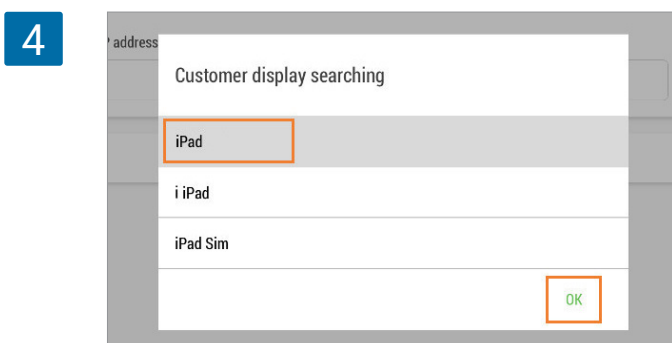
Tap the '+' button to add a customer display.



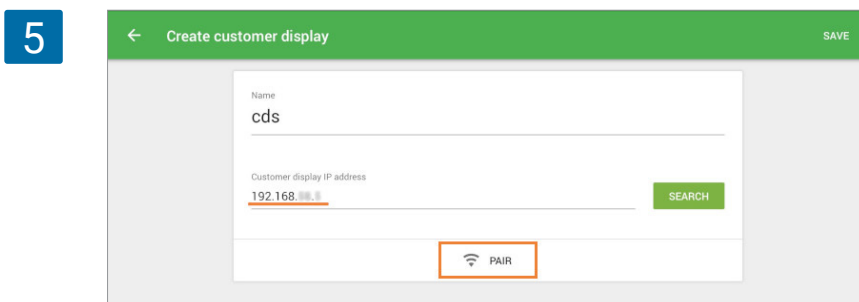
Enter your customer display name into the 'Name' field and tap the 'Search' button to search the network for available customer display device.



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



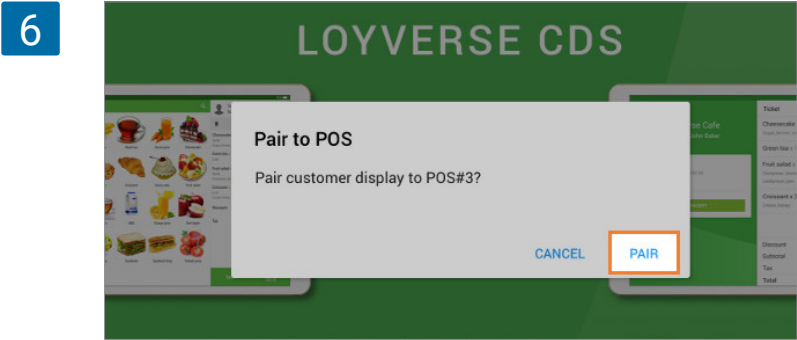
If automatic discovery fails, you can enter the IP address of the customer display device manually. You can take the information about the IP address from the Loyverse CDS welcome screen.



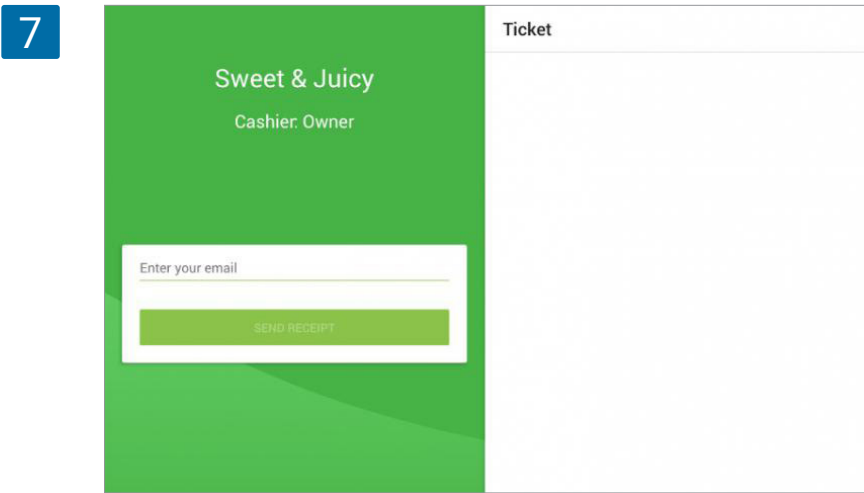
Then tap the 'Pair' button.



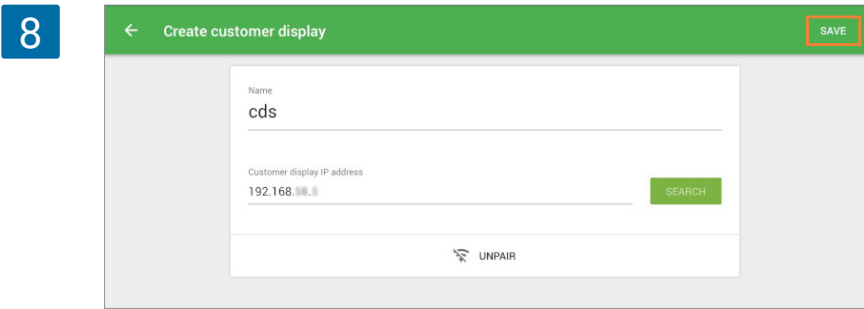
On the Loyverse CDS tablet, the invitation to pair CDS to POS will appear. Tap 'Pair' to confirm the connection.



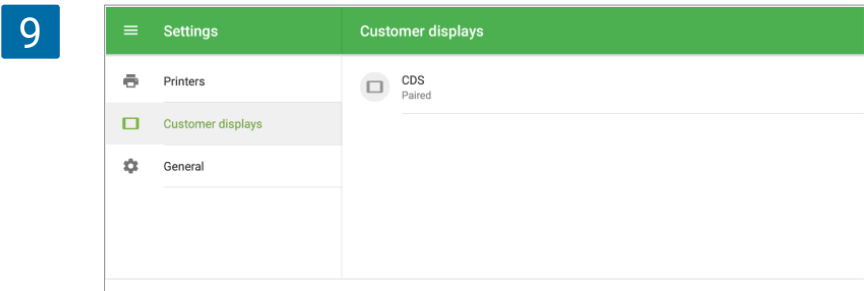
If you see a screen with a blank ticket, then your customer display is paired with Loyverse POS.



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



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



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

First shop  
Served by Alice

SEND RECEIPT

Ticket	Dine in
Apple Juice x 1	7.00
Black Tea x 2 Cinnamon, Muscat	5.00
Berry cake x 1	8.00
Cake with strawberry x 1	9.00
Discounts	4.00
Subtotal	26.00
Tax	3.58
Total	29.58

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

First shop  
Served by Alice

SEND RECEIPT

Ticket	Dine in
Apple Juice x 1	7.00
Black Tea x 2 Cinnamon, Muscat	5.00
Berry cake x 1	8.00
Cake with strawberry x 1	9.00
Discounts	4.00
Subtotal	26.00
Tax	3.58
Total	29.58

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



3

<div>First shop Served by Alice</div> <div><div>Mary Johnson Points balance: 30.19</div><div>mary@mail.com</div><div>Receipt will be sent to email.</div></div>	<div>Ticket</div> <div>Dine in</div>
	<div>Apple Juice x 1</div> <div>Black Tea x 2 Cinnamon, Muscat</div> <div>Berry cake x 1</div> <div>Cake with strawberry x 1</div>
	<div>Discounts</div> <div>Subtotal</div> <div>Tax</div> <div>Total</div>
	<div>7.00</div> <div>5.00</div> <div>8.00</div> <div>9.00</div>
	<div>4.00</div> <div>26.00</div> <div>3.58</div> <div>29.58</div>

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

4

<div>First shop Served by Alice</div> <div><div>Mary Johnson Points balance: 30.19</div><div>mary@mail.com</div><div>Receipt will be sent to email.</div></div>	<div>Ticket</div> <div>Dine in</div>
	<div>Apple Juice x 1</div> <div>Black Tea x 2 Cinnamon, Muscat</div> <div>Berry cake x 1</div> <div>Cake with strawberry x 1</div> <div>Pepperoni Pizza x 1</div> <div>Croissant x 1</div> <div>Banana x 1</div> <div>Capuccino x 1 Cinamon</div>
	<div>Discounts</div> <div>Subtotal</div> <div>Tax</div> <div>Total</div>
	<div>7.00</div> <div>5.00</div> <div>8.00</div> <div>9.00</div> <div>7.60</div> <div>3.20</div> <div>4.00</div> <div>5.00</div>
	<div>4.00</div> <div>45.80</div> <div>6.30</div> <div>52.10</div>

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

5

<div>First shop Served by Alice</div> <div><div>Mary Johnson Points balance: 35.40</div><div>mary@mail.com</div><div>Receipt will be sent to email.</div></div>	<div>Transaction successful</div>
	<div>52.10</div> <div>Total paid</div> <div>17.90</div> <div>Change</div> <div>Points earned: 5.21</div>



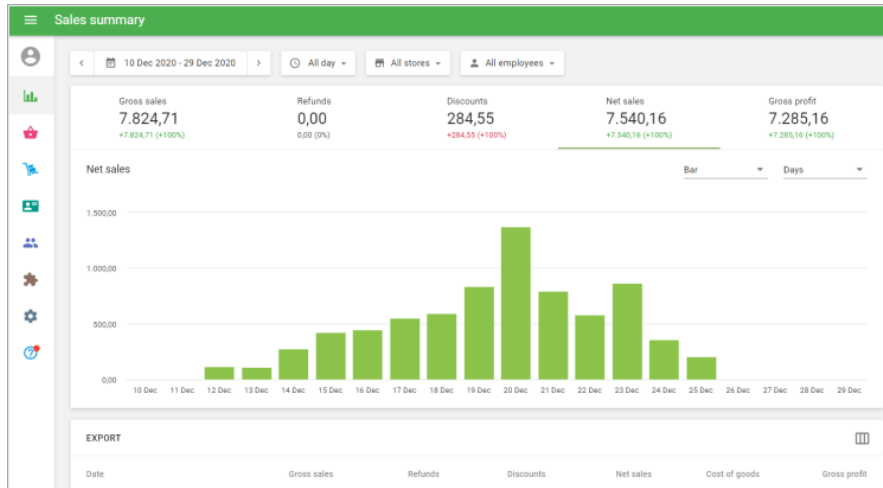
# 7. Reports



## 7.1 Sales Summary Report in the Back Office

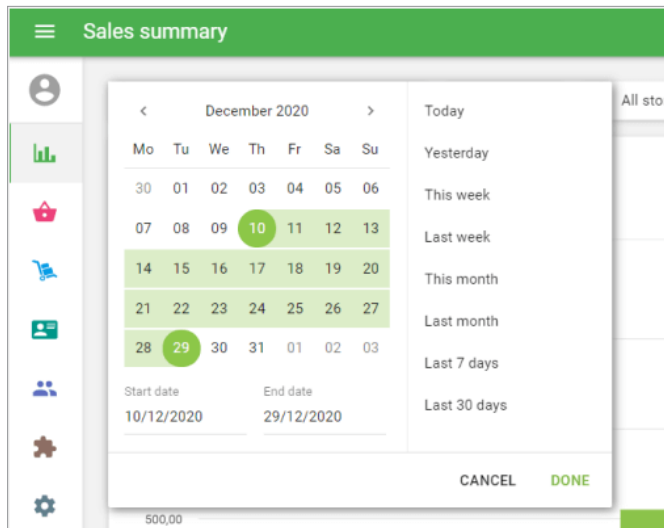
When you enter the Back Office, you will see all of the most important information about your sales in the "Sales Summary" section.

1



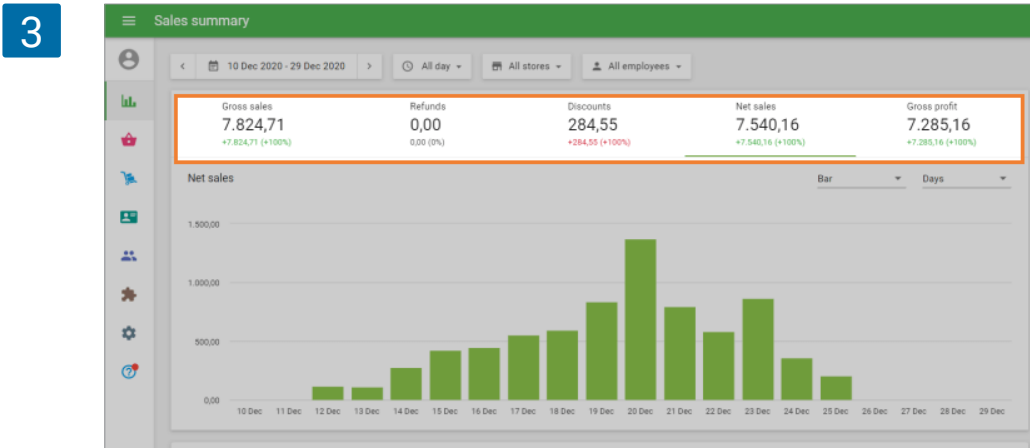
At the top, you can set the period for the report: today, yesterday, this week, this month or custom. If you have several stores, you can select some of them for the report. The same for employees.

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.



**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.

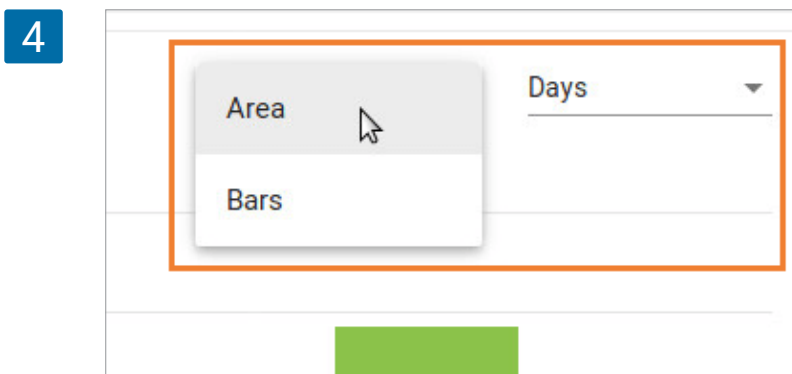
**Net sales** is the total revenue minus the cost of discounts and sales returns.

**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.



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

EXPORT							
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	
Page: 1 of 1 Rows per page: 10							

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

Goods

0,00

0,00

0,00

0,00

0,00

0,00

0,00

0,00

0,00

0,00

Displayed fields

☒ Gross sales

☒ Refunds

☒ Discounts

☒ Net sales

☒ Cost of goods

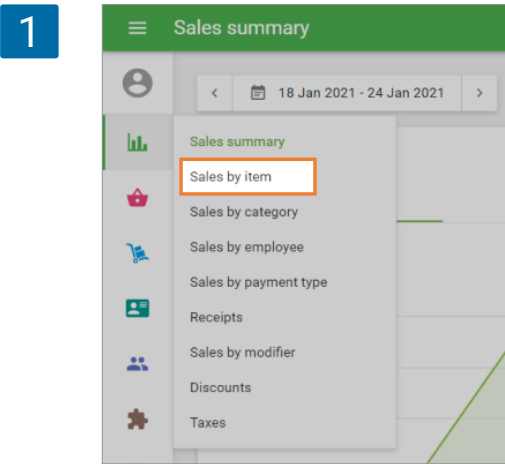
☒ Gross profit

☐ Margin

☐ Taxes

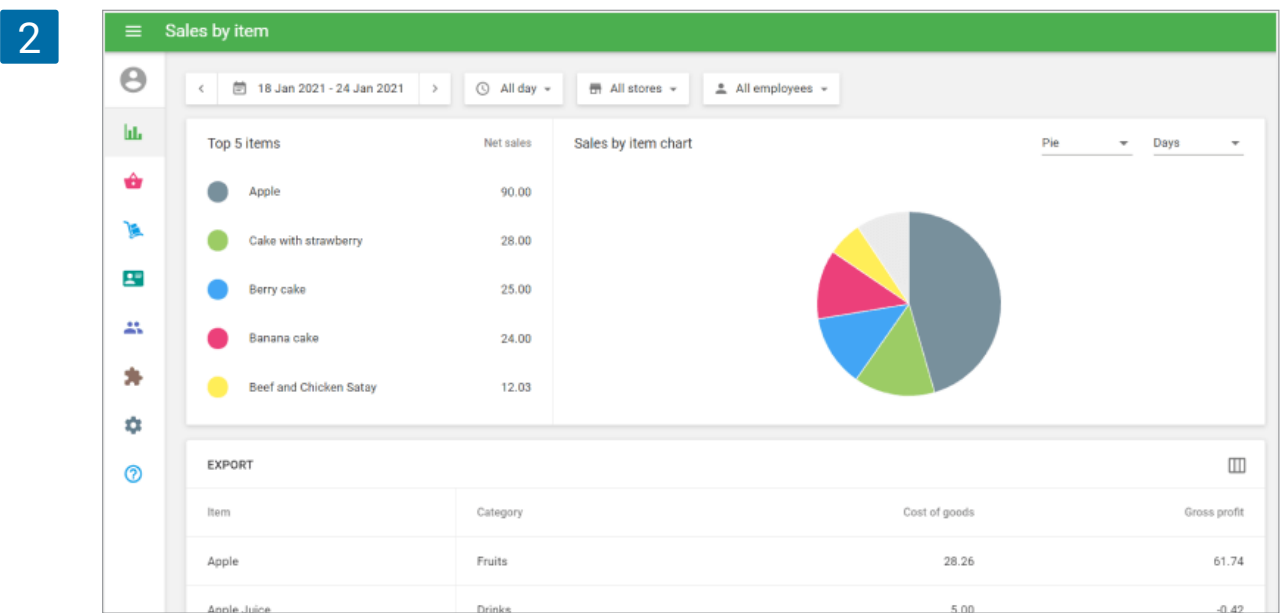
# 7.2 Sales by Item Report in the Back Office

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

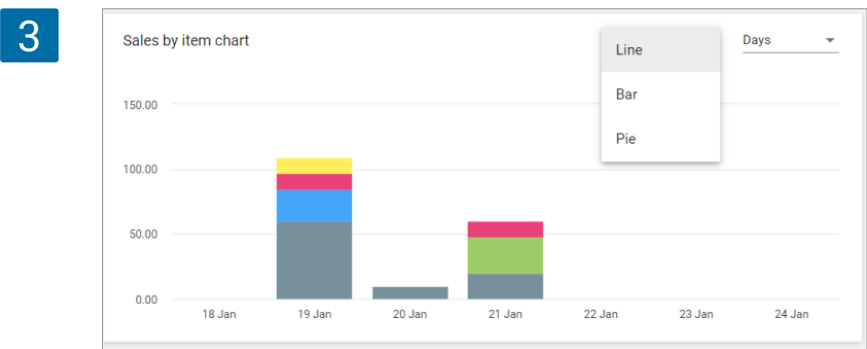


At the top, you can set the period for the report: today, yesterday, this week, this month or custom.

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.

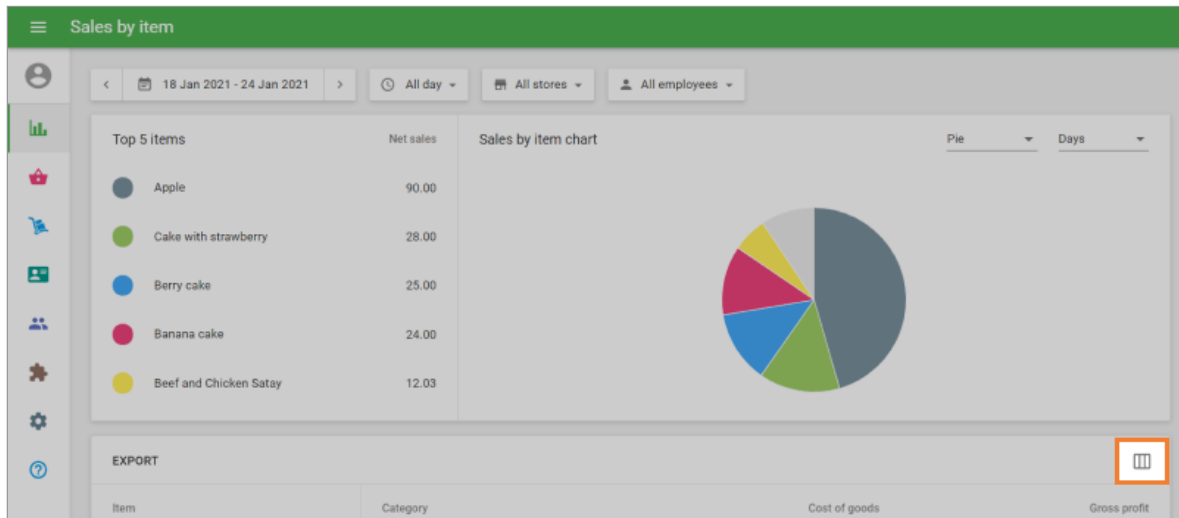


For the 'Sales by item chart' on the right side, you can choose to see the data either as a Bar, Line or Pie chart and also group it in Hours, Days, Weeks, Months, Quarters, or Years.



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

- ☒ Item
- ☐ SKU
- ☒ Category
- ☐ Items sold
- ☐ Gross sales
- ☐ Items refunded
- ☐ Refunds
- ☐ Discounts
- ☐ Net sales
- ☒ Cost of goods
- ☒ Gross profit
- ☐ Margin

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

$$GrossProfit = NetSales - CostOfGoods$$

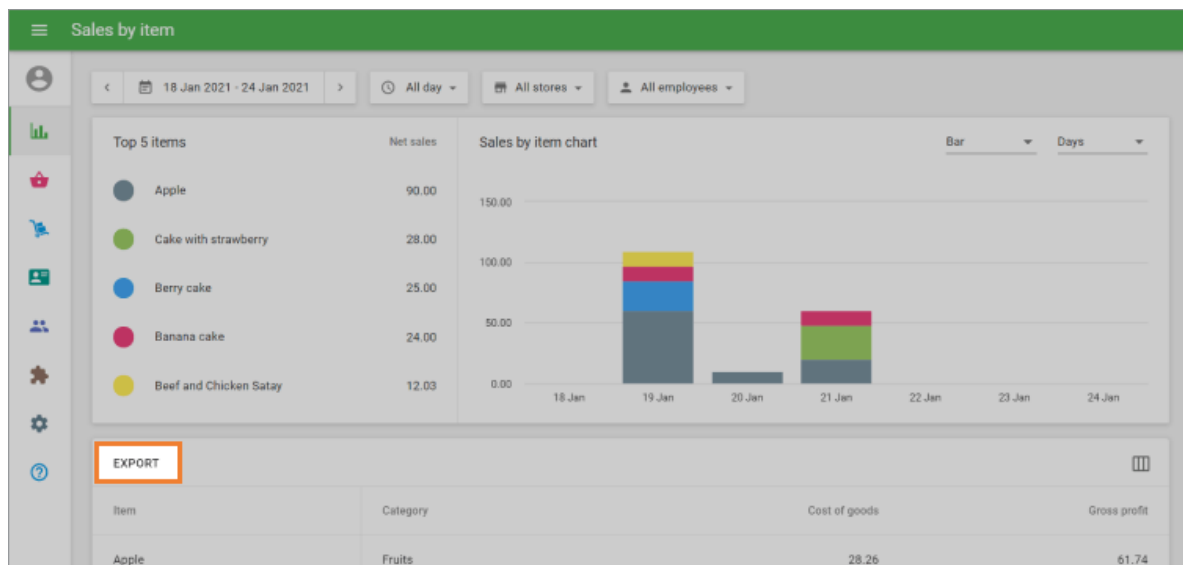
**Margin** — the item's margin for the selected period, calculated as the ratio of Gross profit to Net sales

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

**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](#).

7

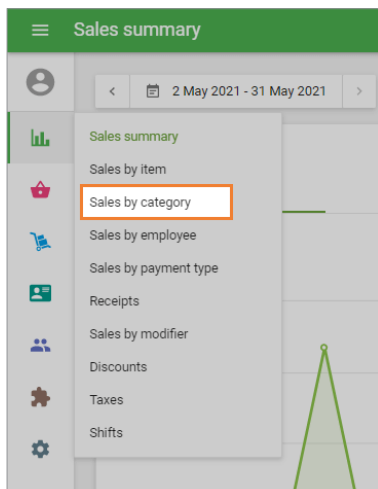
Item name	SKU	Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin
Apple Juice	1001	Hot Drinks	1	2.29	0	0	0	2.29	1.44	0.85	37.12
Beer	10018	Drinks	10	120	0	0	0	120	70	50	41.67
Beer glass 0.5 L	10010	Drinks	1	6	0	0	0	6	3.5	2.5	41.67
Black Tea	1014	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

A screenshot of the 'Sales by category' report table. The table has five columns: Category, Items sold, Net sales, Cost of goods, and Gross profit. The data is as follows:

Category	Items sold	Net sales	Cost of goods	Gross profit
Desserts	7	90.99	11.10	79.89
Drinks	22	57.22	53.00	4.22
Fruits	3	33.00	21.55	11.45
Hot Drinks	3	7.67	0.78	6.89

You can export the 'Sales by category' report by clicking on the 'Export' button.

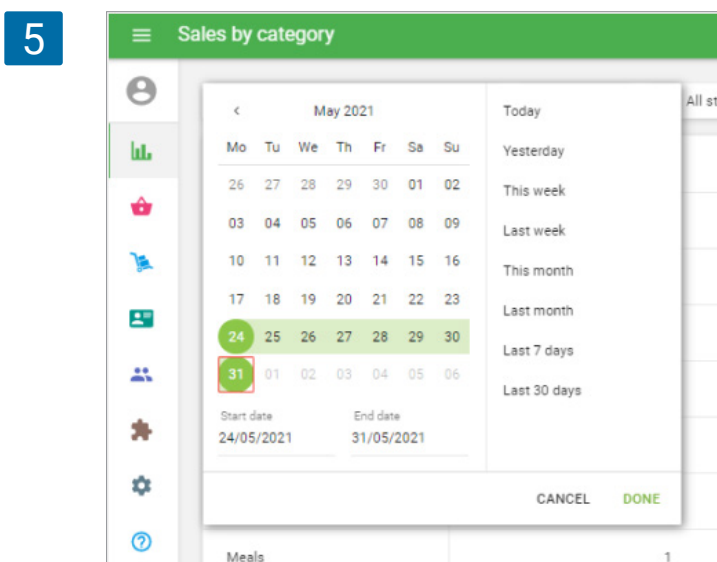
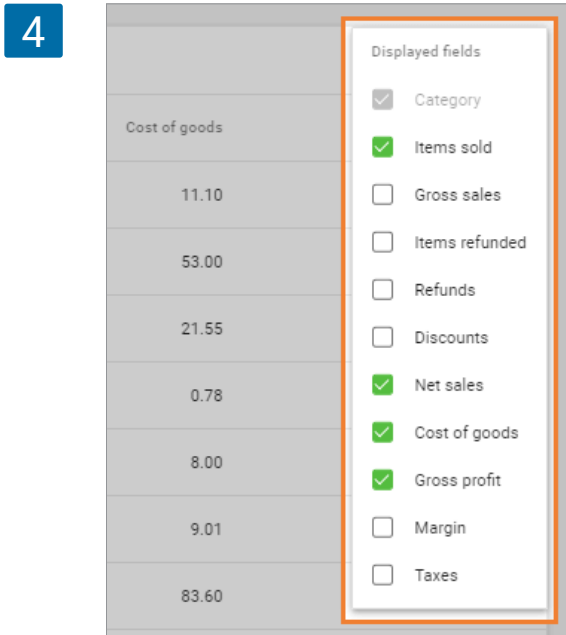
You can also set up and customize the displayed columns by clicking on the three vertical lines icon on the right-hand side of the header.

3

A close-up screenshot of the 'Sales by category' report table. The 'EXPORT' button is highlighted with an orange rectangle. The three vertical lines icon for column selection is also highlighted with an orange rectangle. The table data is the same as in the previous screenshot.

Category	Items sold	Net sales	Cost of goods	Gross profit
Desserts	7	90.99	11.10	79.89
Drinks	22	57.22	53.00	4.22
Fruits	3	33.00	21.55	11.45
Hot Drinks	3	7.67	0.78	6.89

Then select your desired columns.

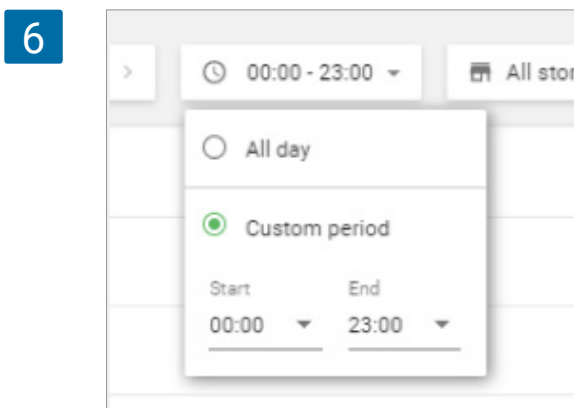


You can also choose the specific time period from which to view data: Today, Yesterday, This week, Last week, This month, Last month, Last 7 days, or Last 30 days.

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.



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

7

Category	Items sold	Cost of goods	Gross profit
Desserts	7	90.99	11.10
Drinks	22	57.22	53.00
Fruits	3	33.00	21.55

## 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

Menu Item
Sales summary
Sales by item
Sales by category
Sales by employee
Sales by payment type
Receipts
Sales by modifier
Discounts
Taxes

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

Receipt no.	Date	Store	Employee	Customer	Type	Total
8-1628	10 Mar 2021 11:42	Coffee shop	Louis	—	Sale	20.98
8-1627	10 Mar 2021 11:37	Coffee shop	Louis	—	Sale	20.98

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**

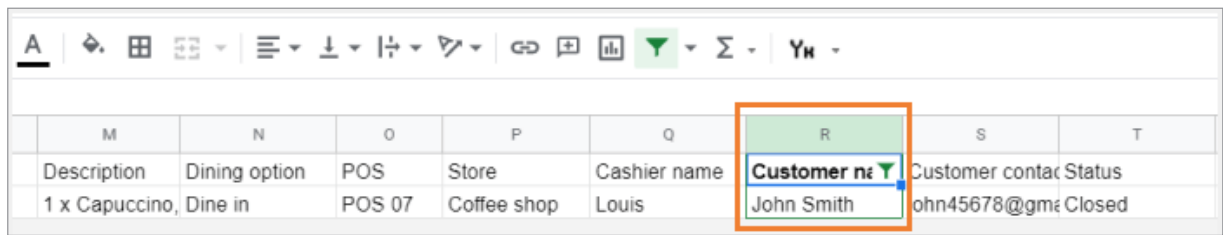
After you download the file to your computer, you can [open it in Google Sheets](#).

**5**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	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
1	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
2	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
3	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
4	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
5	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
6	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
7	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
8	03/03/2021	8-1621	Sale	33.00	0.00	33.00	0.00	0.00	33.00	11.70	21.30	Cash	1 x Cake with s Dine in		POS 07	Coffee shop	Louis
9	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
10	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
11	25/02/2021	33-1005	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
12	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
13	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
14	17/02/2021	11-1434	Sale	44.90	0.00	44.90	0.00	0.00	44.90	17.30	27.60	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



The screenshot shows a table with columns M through T. Column R is highlighted with a green background and contains the text 'Customer name'. A blue filter icon is visible next to the text. The table data includes: Description (1 x Capuccino), Dining option (Dine in), POS (POS 07), Store (Coffee shop), Cashier name (Louis), Customer name (John Smith), Customer contact (john45678@gmail.com), and Status (Closed).

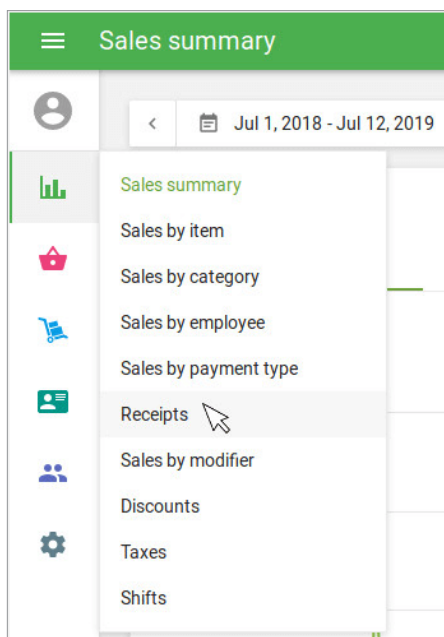
M	N	O	P	Q	R	S	T
Description	Dining option	POS	Store	Cashier name	Customer name	Customer contact	Status
1 x Capuccino	Dine in	POS 07	Coffee shop	Louis	John Smith	john45678@gmail.com	Closed

## 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.

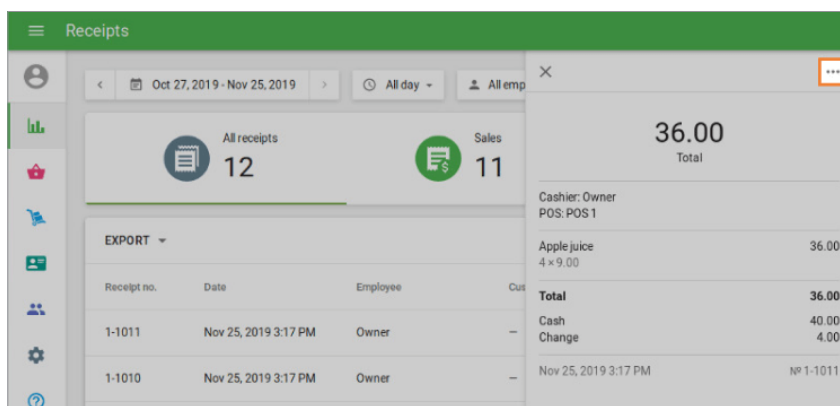
In the Back Office, go to the 'Receipts' section in the 'Reports' menu.

1

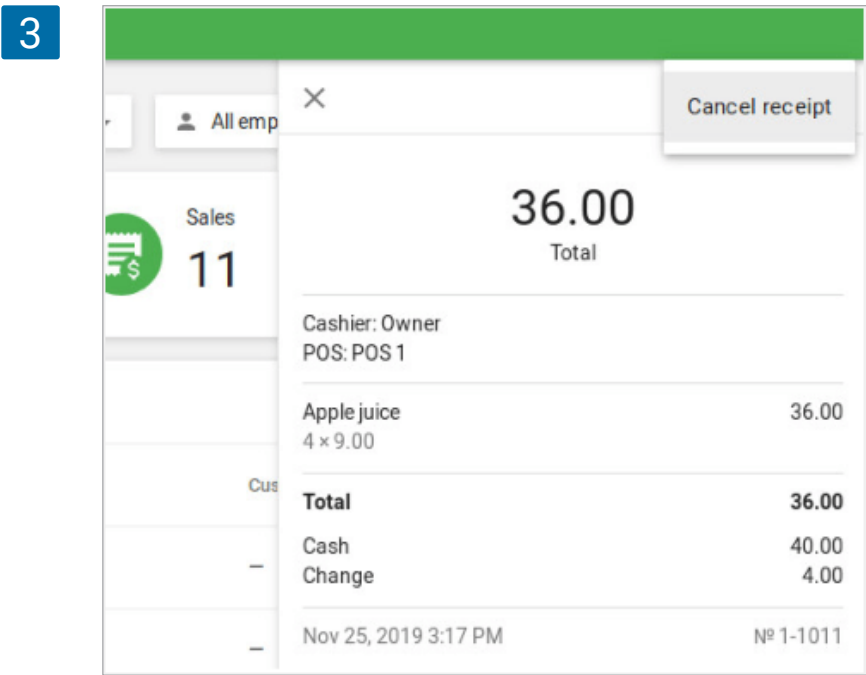


Click on the receipt that you want to cancel to see the receipt details. Click on the three dots menu in the upper right corner.

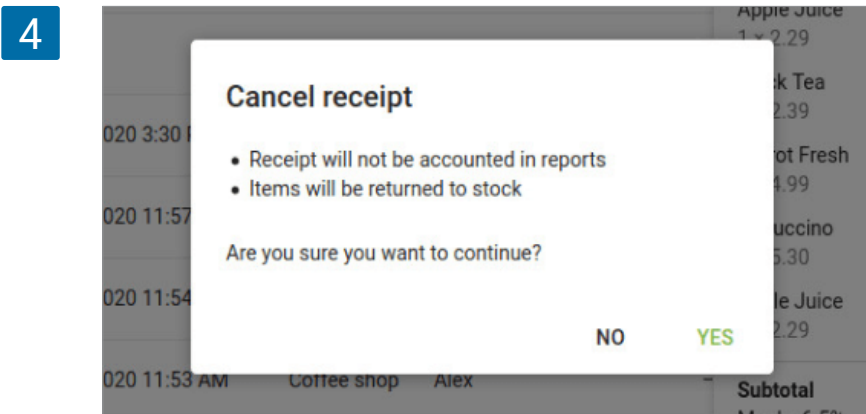
2



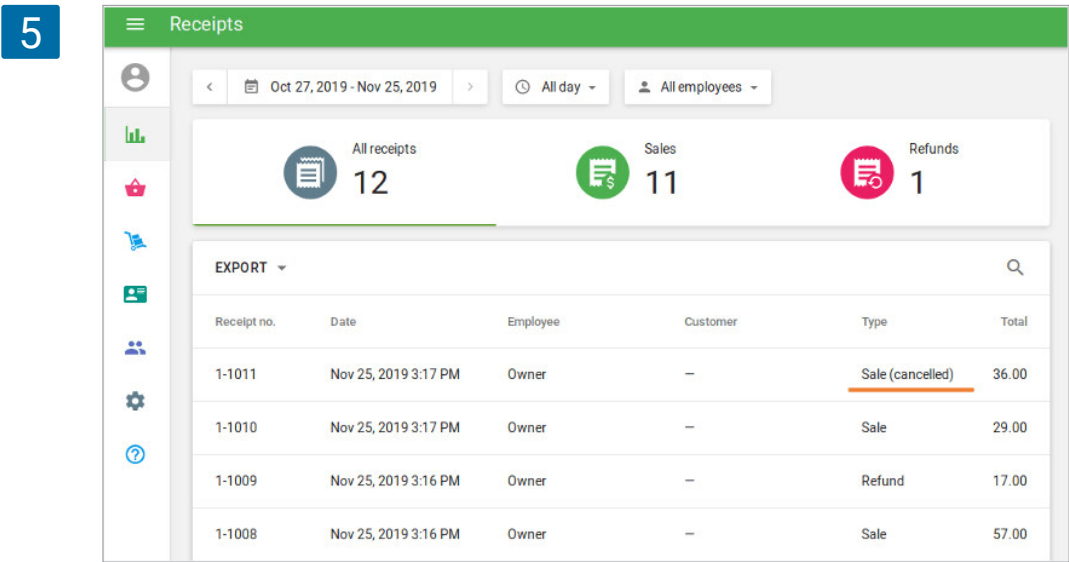
Click on the “Cancel receipt” button.



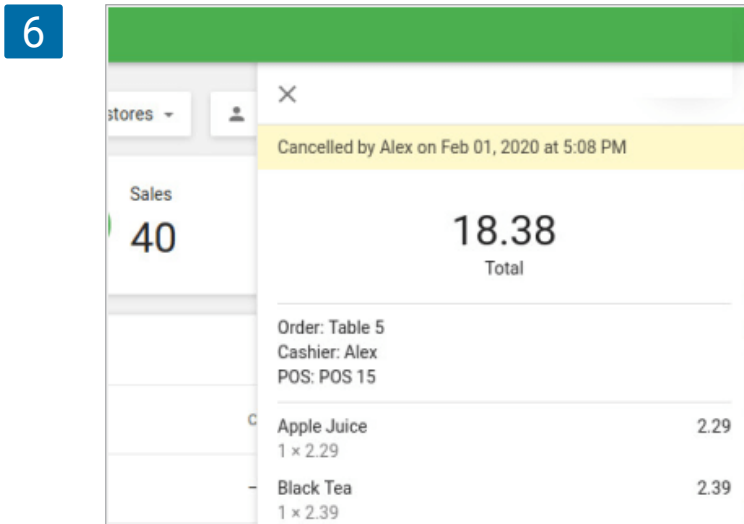
Confirm cancellation in the dialog screen.



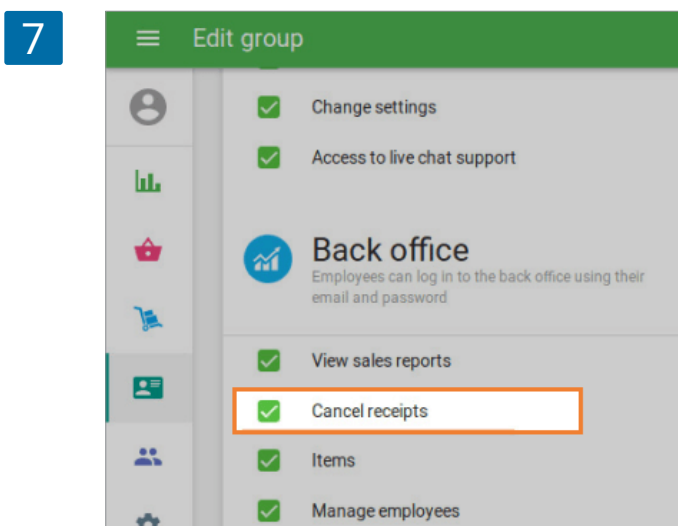
Now, this receipt is marked as cancelled in the receipts list.



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



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



### 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

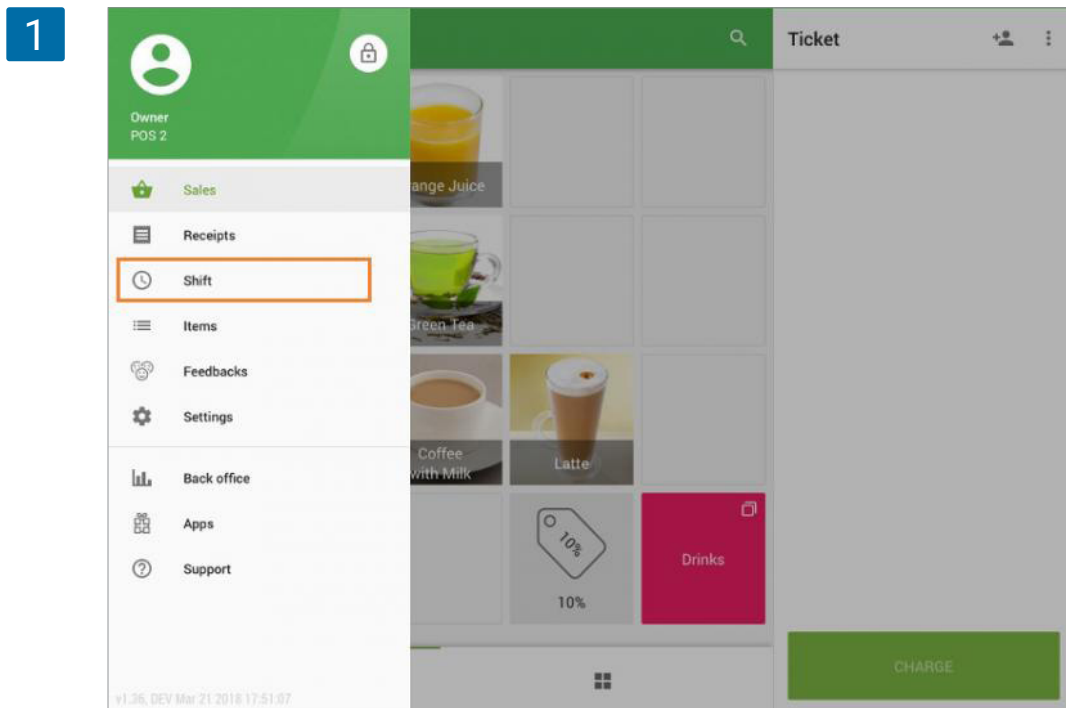
The cancellation of a receipt cannot be reversed.  
You cannot cancel the receipt that was fully or partially refunded without the cancellation of the refund receipt first.  
In case of cancellation of the receipts with integrated card payments, funds will not be returned to the customer's card.

## 7.6 Shift Report with Sales Summary at the POS

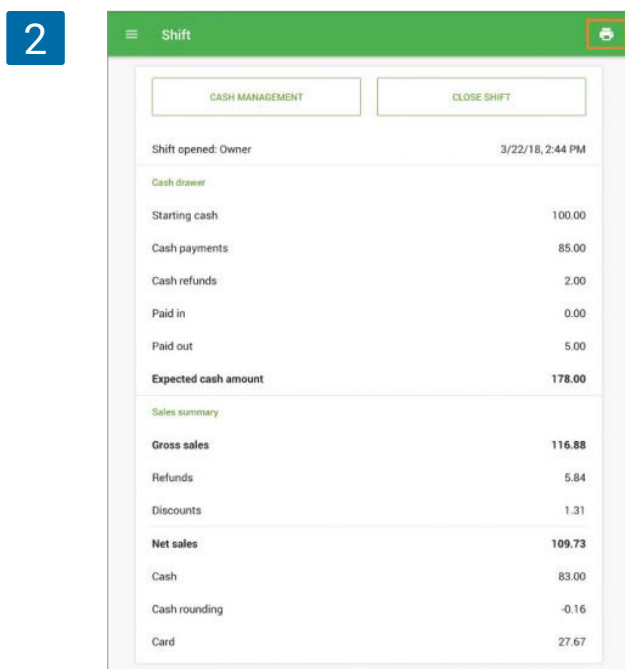
It is possible to see the shift report when the option 'Shifts' is switched on in the System settings in the Back Office.

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.



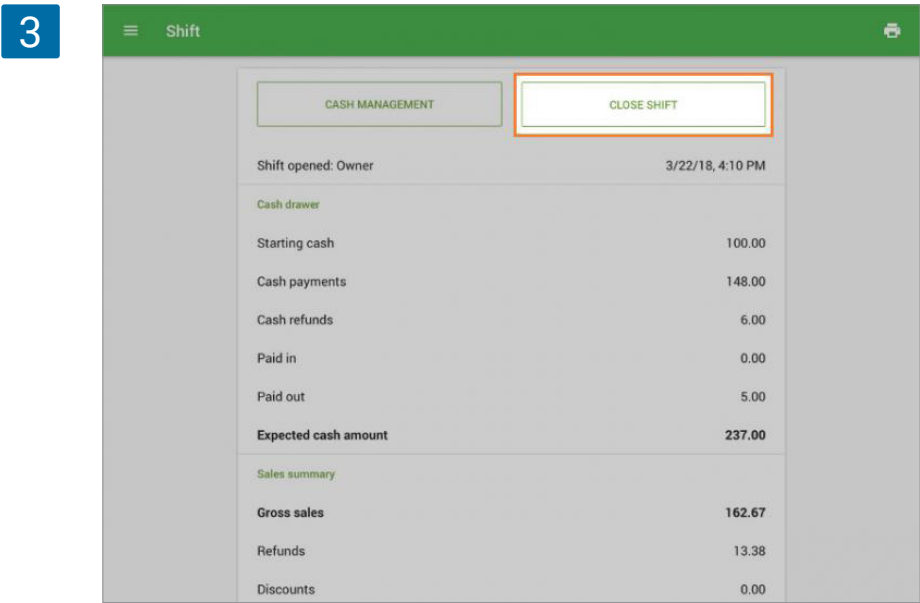
The **report of the current shift** contains data of the cash drawer and the current sales summary (X-report). You can print this report on your receipt printer by tapping the 'Print' icon.



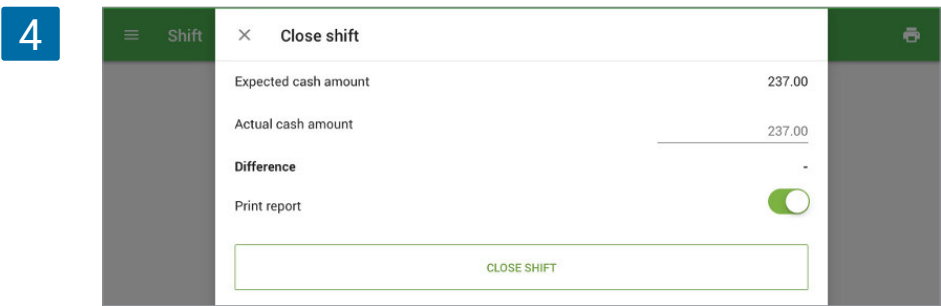
The closed shift report contains data of the cash drawer and the sales summary at the closing of the shift, including the actual amount of cash and the difference in comparison with the expected amount (Z-report).



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



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.



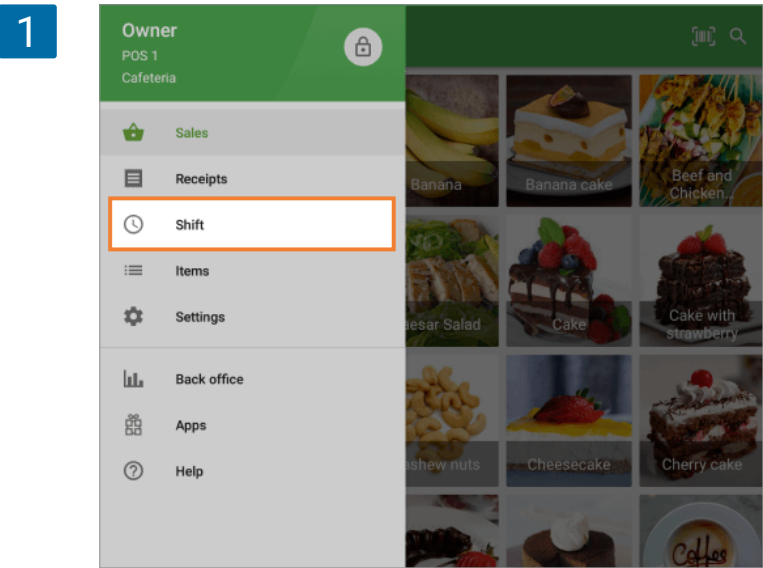
5

Shift report	
Store: Shop 2	
POS: POS 2	
Shift opened: Owner 3/22/18, 4:10 PM	
Shift closed: Owner 3/22/18, 4:15 PM	
Cash drawer	
Starting cash	100.00
Cash payments	148.00
Cash refunds	6.00
Paid in	0.00
Paid out	5.00
Expected cash amount	237.00
Actual cash amount	237.00
Difference	-
Sales summary	
Gross sales	162.67
Refunds	13.38
Discounts	0.00
Net sales	149.29
Cash	142.00
Cash rounding	-0.82
Card	7.49
3/22/18, 4:15 PM	

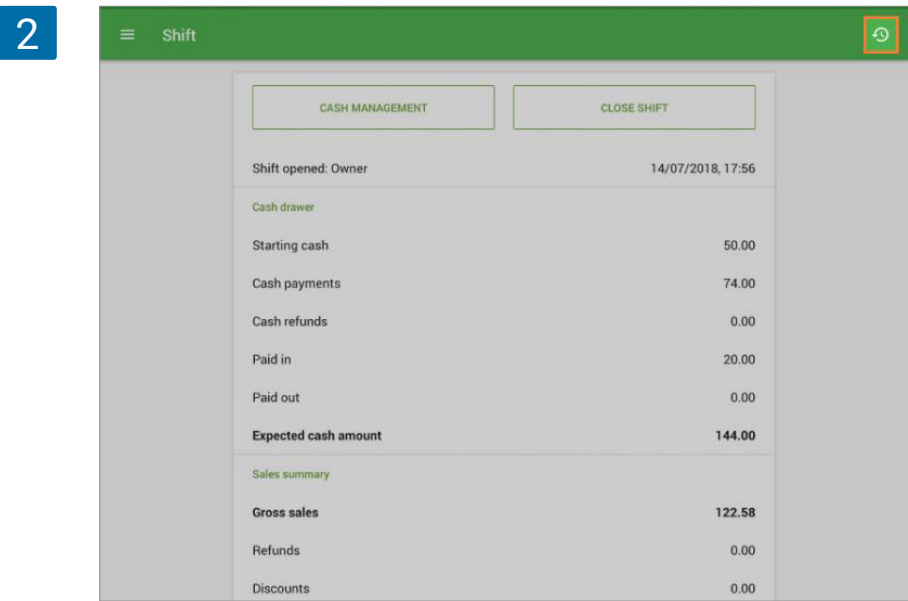
The closed shift report will be printed on your receipt printer.

# 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.



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



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'.



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

Shift	Shift	Print
Opened: Owner	14/07/18, 17:52 pm	
Closed: Owner	14/07/18, 17:54 pm	
Cash drawer		
Starting cash	100.00	
Cash payments	71.00	
Cash refunds	0.00	
Paid in	0.00	
Paid out	0.00	
Expected cash amount	71.00	
Actual cash amount	171.00	
Difference	100.00	
Sales summary		
Gross sales	101.49	
Refunds	0.00	

### 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  $20 \times 0.06 = 1.20$ .

1

<b>PAYMENT:</b>	
<b>21.20</b>	
-----	
Cashier: Alex	
POS: POS 02	
-----	
Sandwich	20.00
1 × 20.00	
-----	
Subtotal	20.00
Sales Tax 6%	1.20
-----	
<b>Total</b>	<b>21.20</b>
Cash	21.20
-----	
Mar 01, 2019 2:09 PM	Nº 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.**

$$\text{Price} = \text{PretaxPrice} + \text{Tax}$$

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

<b>PAYMENT:</b>	
<b>20.00</b>	
-----	
Cashier: Alex	
POS: POS 02	
-----	
Burger	20.00
1 × 20.00	
-----	
<b>Total</b>	<b>20.00</b>
VAT 6%	1.13
Cash	20.00
-----	
Mar 01, 2019 2:10 PM	Nº 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:

$$TA = 12 \times 0.20 = 2.4; TB = 12 \times 0.05 = 0.6$$

1

<b>PAYMENT:</b> <b>15.00</b>	
Cashier: Alex POS: POS 02	
Bread 1 × 12.00	12.00
Subtotal	12.00
Tax B 5%	0.60
Tax A 20%	2.40
<b>Total</b>	<b>15.00</b>
Cash	15.00
Mar 01, 2019 2:56 PM	Nº 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:	
<b>12.00</b>	
-----	
Cashier: Alex	
POS: POS 02	
-----	
Butter	12.00
1 x 12.00	
-----	
<b>Total</b>	<b>12.00</b>
Tax B 5%	0.48
Tax A 20%	1.92
Cash	12.00
-----	
Mar 01, 2019 3:06 PM	Nº 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:

$$TA = 0.1 \times (12 - (1.92 + 0.48)) = 0.96$$

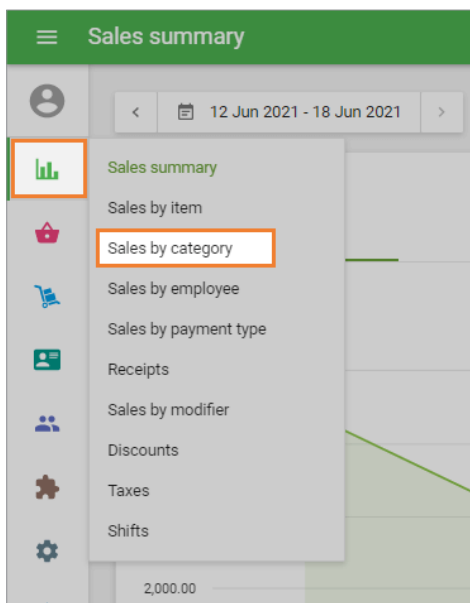
3

<b>PAYMENT:</b>	
<b>12.96</b>	
Cashier: Alex	
POS: POS 02	
Sausage	12.00
1 x 12.00	
Subtotal	12.00
Tax B (included) 5%	0.48
Tax A (included) 20%	1.92
Tax C 10%	0.96
<b>Total</b>	<b>12.96</b>
Cash	12.96

## 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

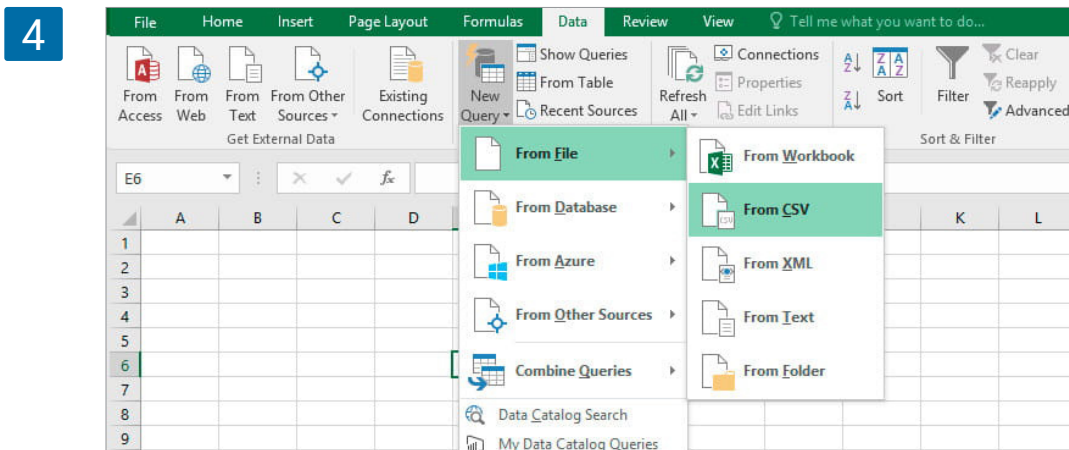
Sales by category		
<	12 Jun 2021 - 18 Jun 2021	>
All day	All stores	All employees
<b>EXPORT</b>		
Category	Items sold	Net sales
Desserts	39	530.05
Drinks	175	4,239.08
Fruits	241.5	5,584.61

And enter your filename. Loyverse POS can export data in the CSV spreadsheet. Now you have the file saved on your computer.

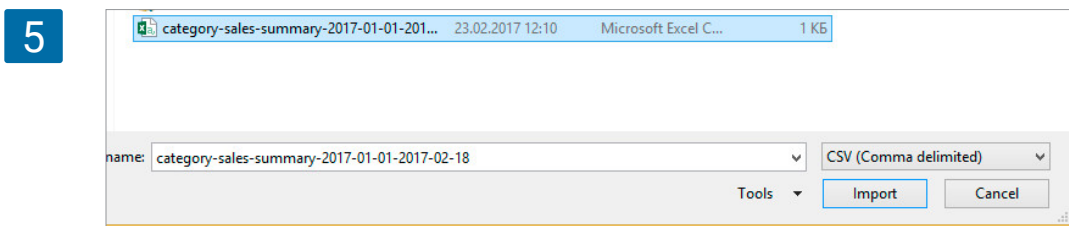
Next, you have to open your file through Microsoft Excel.



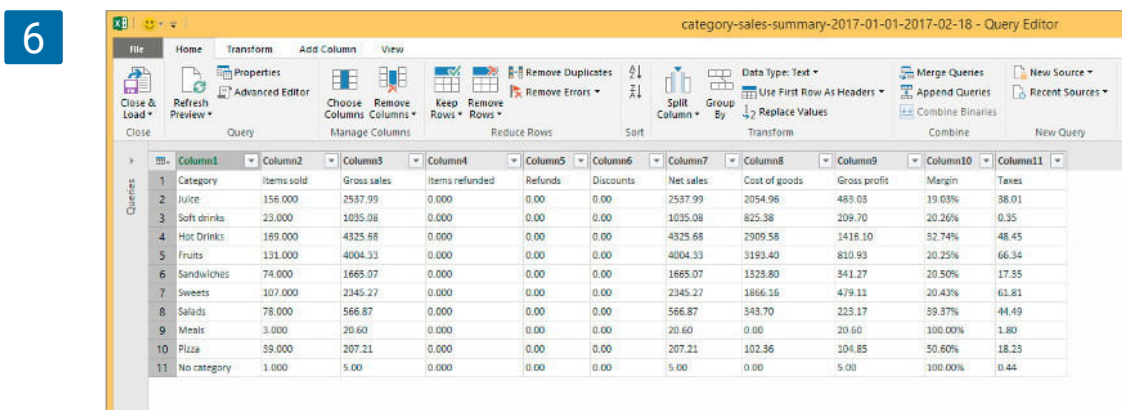
In Microsoft Excel, select 'Data - New Query... - From CSV'.



Select your CSV file and click 'Import'.

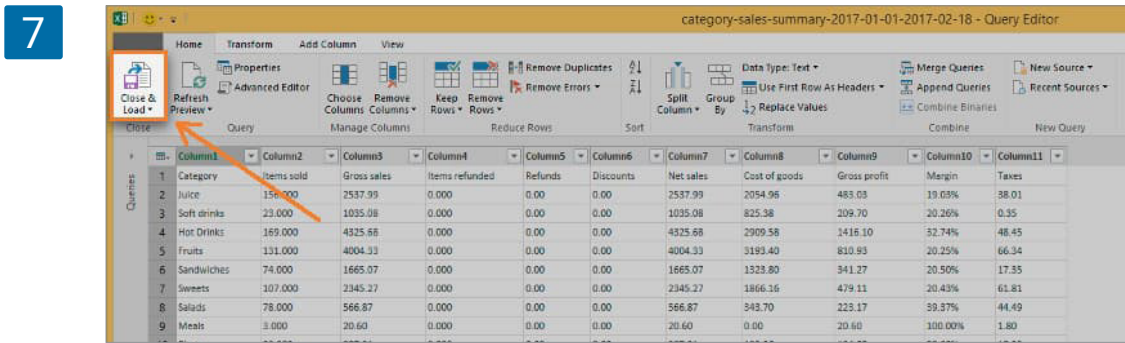


You will see a 'Query Editor' window with table.

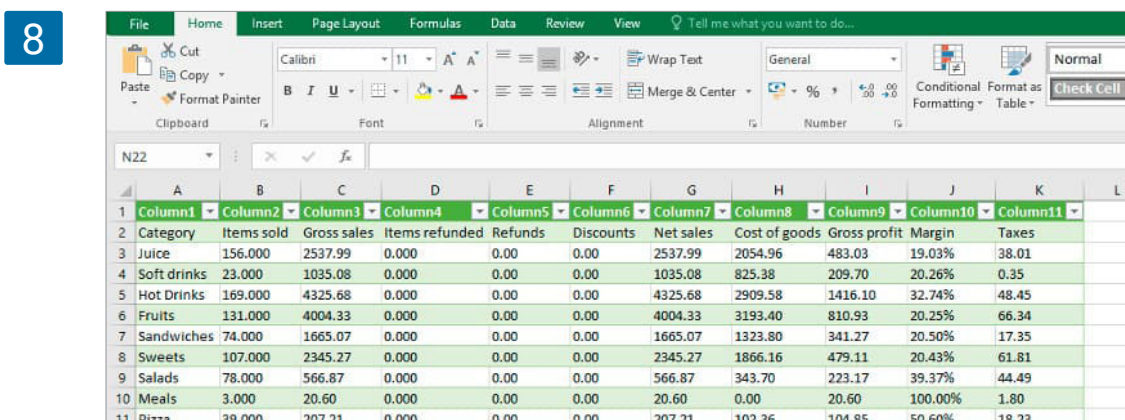




Click 'Close & Load'.

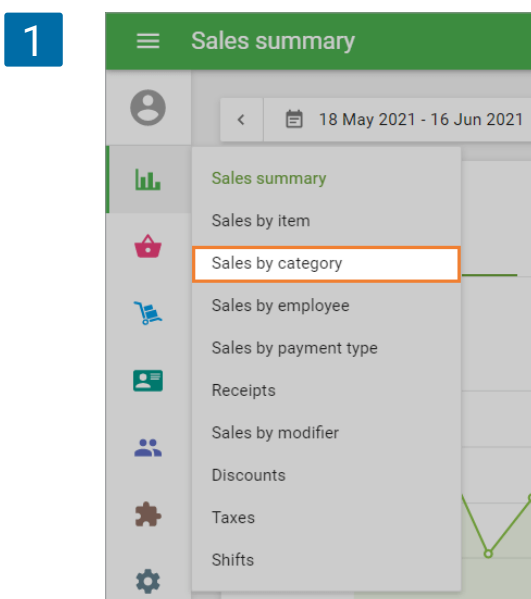


As a result, you have opened the table with the exported sales report by category.

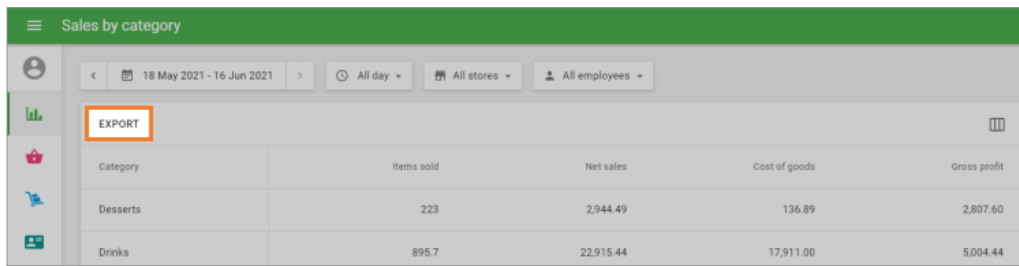


## 7.10 How to Export Data from Reports and Open in LibreOffice Calc or OpenOffice Calc

Select your Report in Back Office, in the 'Reports' section. For example, view 'Sales by category'.



2



Category	Items sold	Net sales	Cost of goods	Gross profit
Deserts	223	2,944.49	136.89	2,807.60
Drinks	895.7	22,915.44	17,911.00	5,004.44

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 LibreOffice Calc (or OpenOffice Calc).

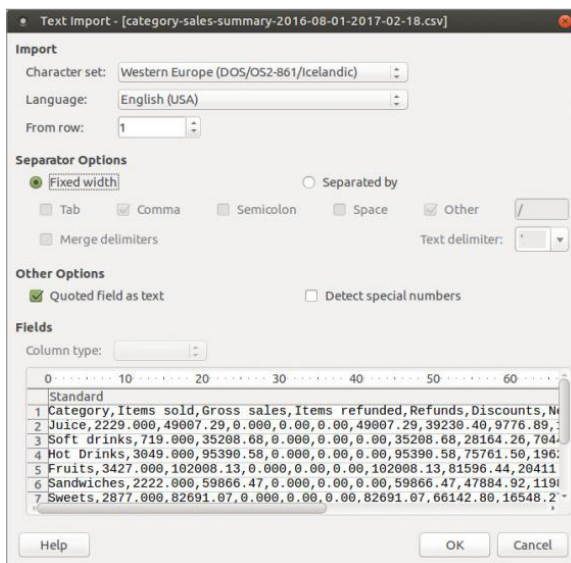
3



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

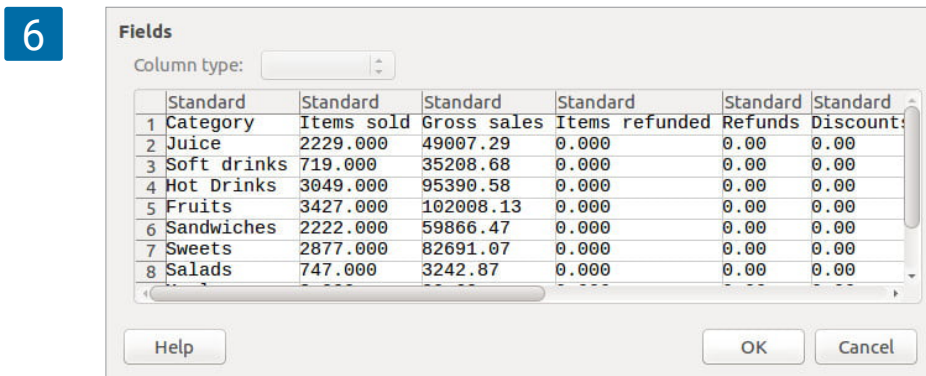


Select 'Unicode (UTF-8)' encoding in 'Character set' drop-down list. In Separator Options, select 'Separated by' and select checkbox 'Comma'.

5



As soon as you set up correct options, you will see table with your data in the preview window.



Click 'OK' button to open file.

As a result, you have opened the table with the exported sales report by category.

7

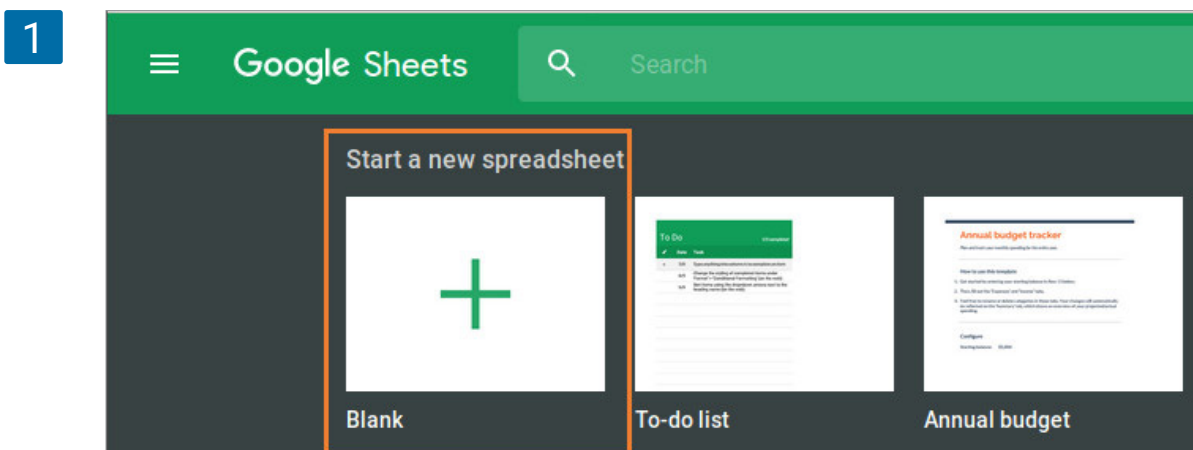
	A	B	C	D	E	F	G	H	I	J	K
1	Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin	Taxes
2	Juice	2229	49007.29	0	0	0	49007.29	39230.4	9776.89	19.95%	38.01
3	Soft drinks	719	35208.68	0	0	0	35208.68	28164.26	7044.42	20.01%	0.35
4	Hot Drinks	3049	95390.58	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

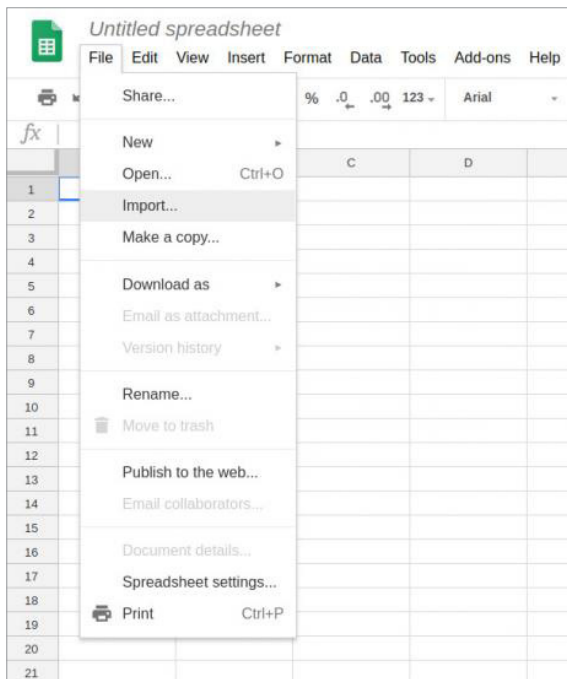
CSV files are used in the Back Office for exporting reports, importing-exporting items, and clients.

For opening this type of files, you can use Google Sheets.

Go to [Google Sheets](https://sheets.google.com) and click on the button 'Start a new spreadsheet'.

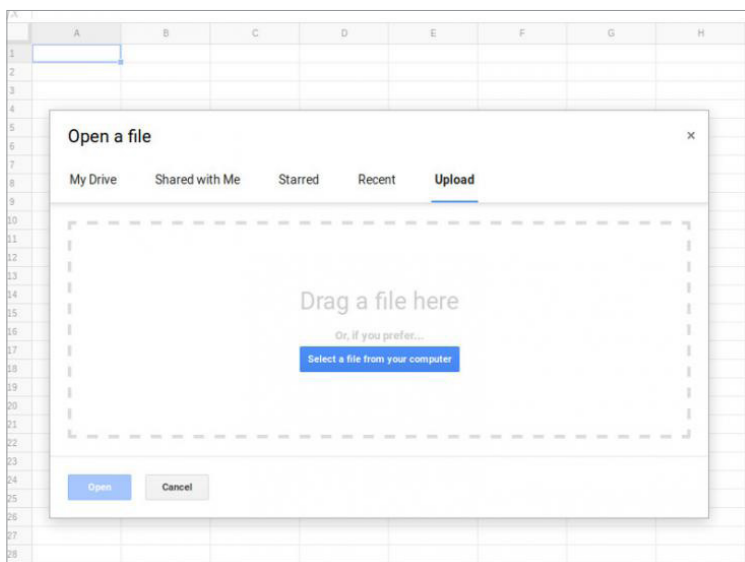


2



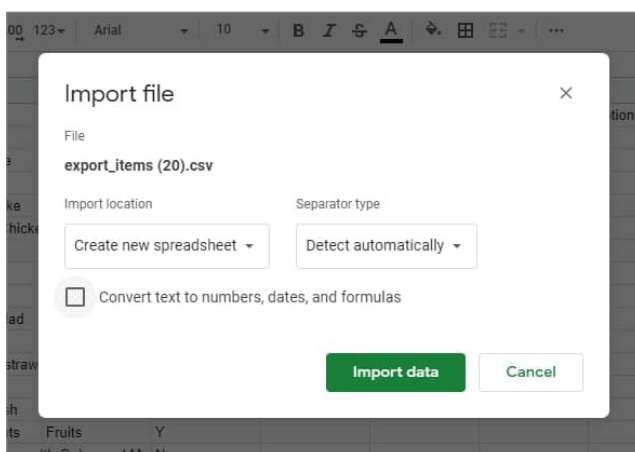
Go to the 'Upload' tab of the 'Open a file' window and select your file from your computer.

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

	A	B	C	D	E	F	G	H
	SKU	Name	Category	Cost	Sold by weight	Barcode	SKU of included	Quantity
1	1001	Apple Juice	Hot Drinks	1.44	N	10544566251001		
2	1018	Banana	Fruits	0.88	Y	10544566251018		
3	10018	Bier	Drinks	7	Y			
4	10019	Bier 0.5	Drinks		N		10018	
5	1014	Black Tea	Hot Drinks	1.24	N	10544566251014		
6	1019	Cake	Sweets	1.59	N	10544566251019		
7	10000	Capuccino	Hot Drinks	1	N	7622210286772		
8	1002	Carrot Fresh	Juice	0	N	10544566251002		
9	10009	Cashew nuts	Fruits	0	Y			
10	10015	Cheesecake	Sweets	4	N			
11	10008	Chicken Caesar	Salads	5.3	N			

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

	C	D	E	F
	Category	Items sold	Gross sales	Items ref
1	Hot Drinks	106	1255.2	
2	Fruits	11251.129	25168.95	
3	Drinks	0.5	6	
4	Drinks	7	39	
5	Hot Drinks	102	932.08	
6	No category	3	51	
7	Sweets	99	998.4	
8	Hot Drinks	83	1104.45	
9	Juice	100	1306.86	
10				
11				
12				
13				
14				
15				
16				
17				
18				
19	Sweets	75	885.95	
20	Drinks	36	71.64	

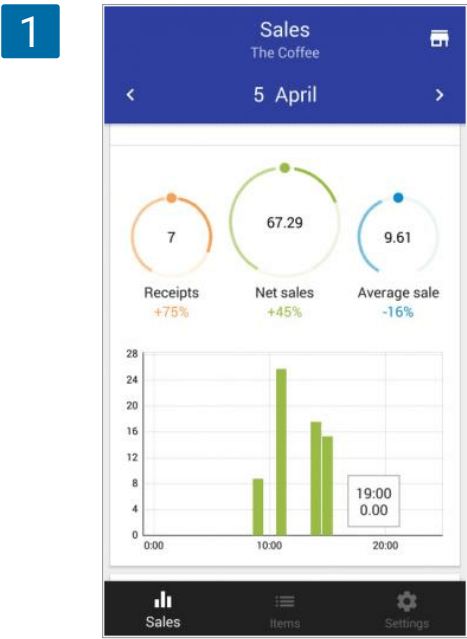


# 7.12 Using Loyverse Dashboard

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.

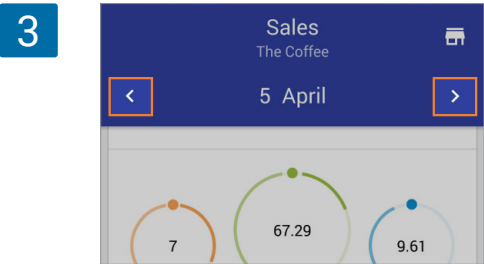


For more details just tap the chart to view sales breakdown.

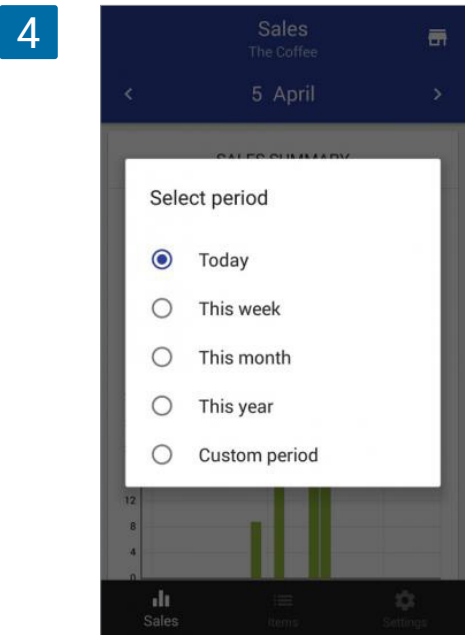
2

Sales summary	
The Coffee	
5 April	
Gross sales	67.29
Refunds	0.00
Discounts	0.00
Net sales	67.29
Tips	0.00
Total tendered	67.29
Cost of goods	27.25
Gross profit	40.04

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.

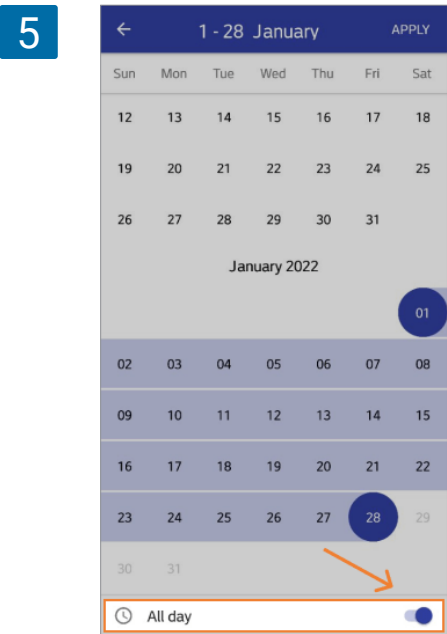


When you'd like to analyze a longer period, tap the date and select this week, month, or even an entire year.



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".



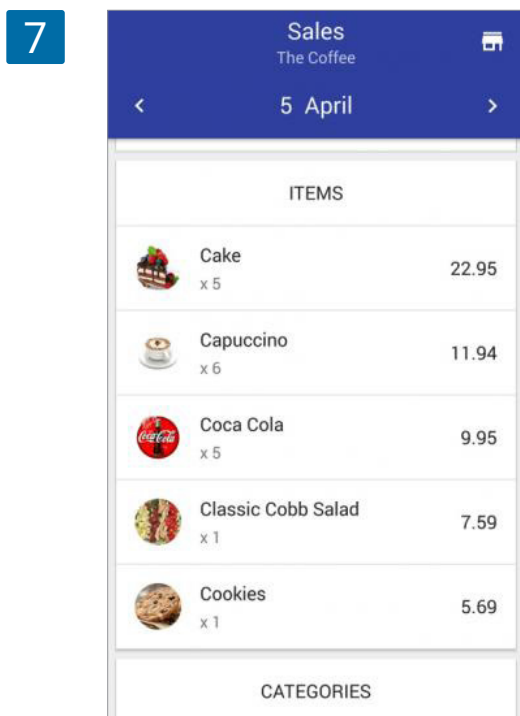
Then set the start and end times of the day you need.



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.



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.

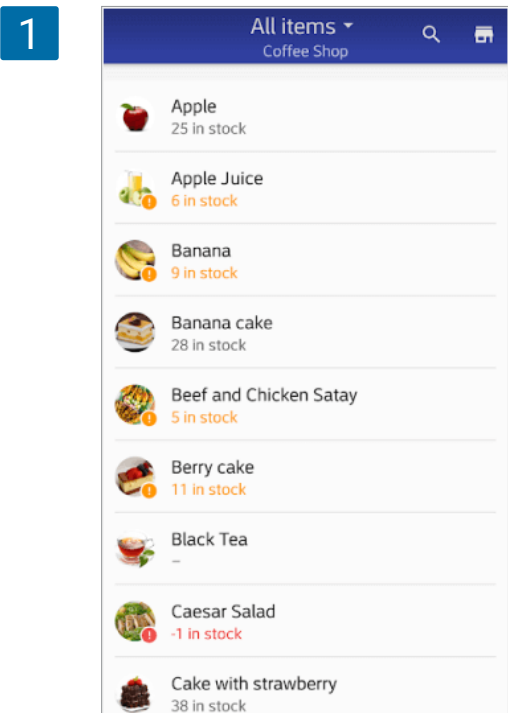


# 7.12.1 Stock Alerts

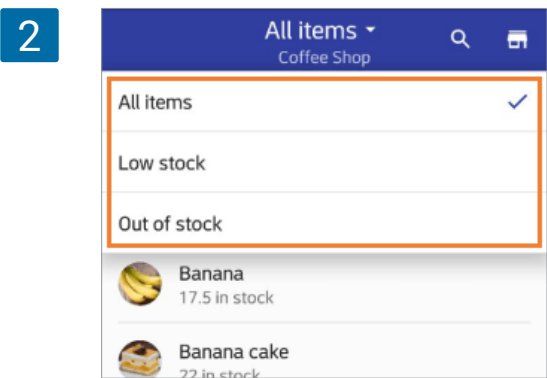
To keep on selling, you have to make sure your store carries sufficient stock. To check the stock status, switch to the Items tab.

Here you see items that are currently in stock, low on stock (yellow), or out of stock (red).

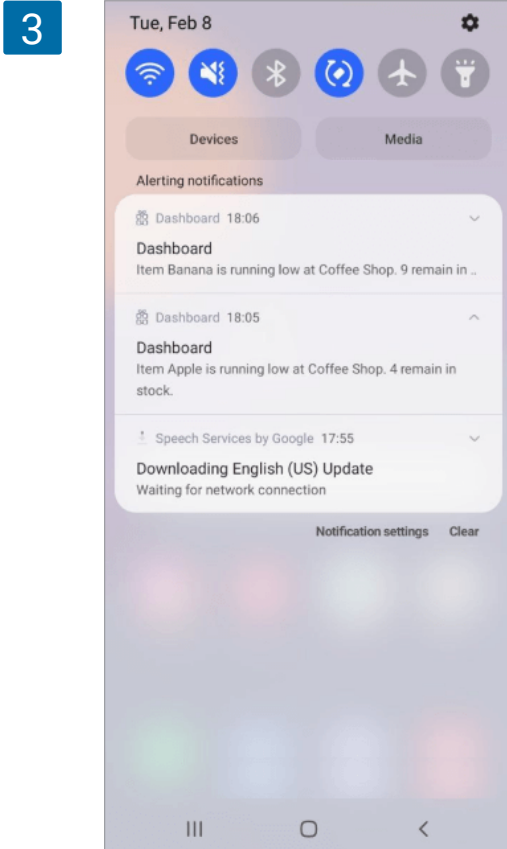
The symbol “-” near item means that the “Track stock” option for this item is off in the Back office.



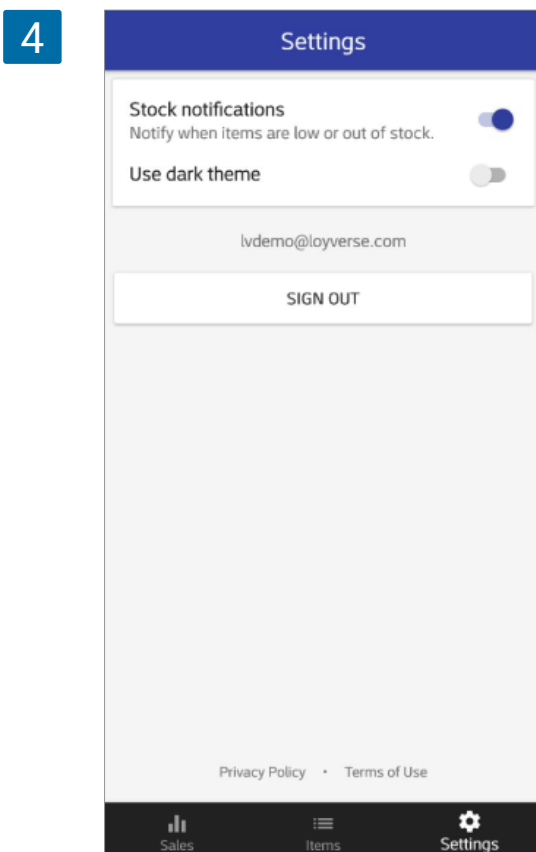
To refine the picture, you can use the filter to see only low-stock or out-of-stock items.



Whenever a sale is made, and the stock gets depleted, you will receive a push notification.

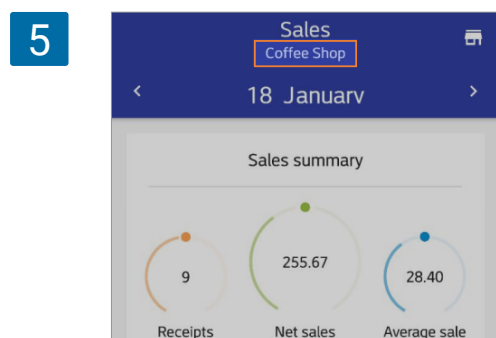


If you don't like to receive instant stock alerts, turn this feature off in the Settings tab.

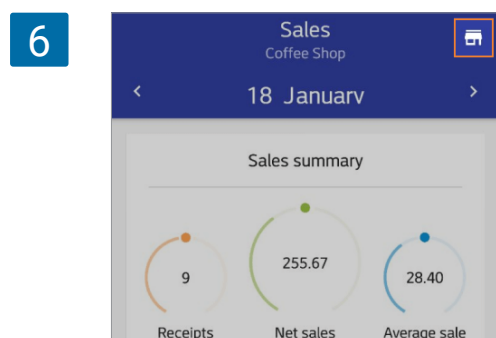


In order to use the dark theme, turn the “Use dark theme” toggle on.

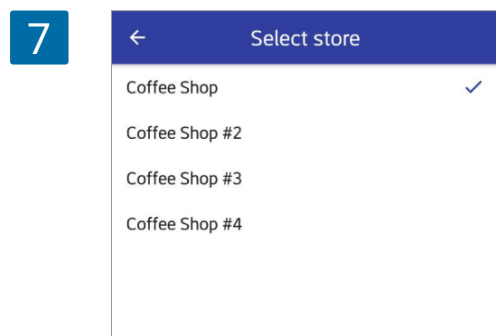
If you have more than one store you will see the name of current store at the top of the main screen.



In order to see the information from a different store, click the “Store” icon at the top right of the screen.



You will see the list of all your stores from which you can choose the needed one.



## 7.13 How to Connect Apps from the Marketplace to Loyverse

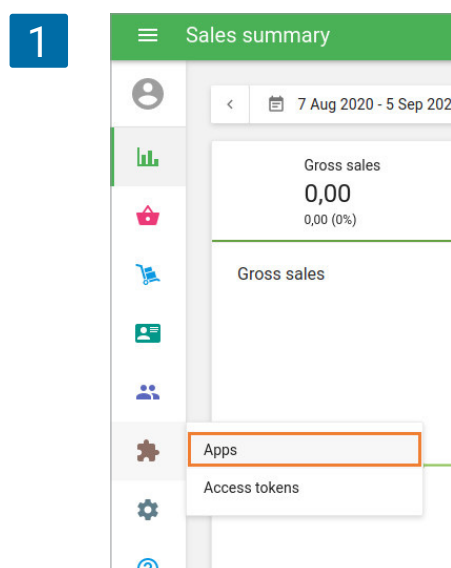
---

You can connect third-party apps to Loyverse to automate your business workflows.

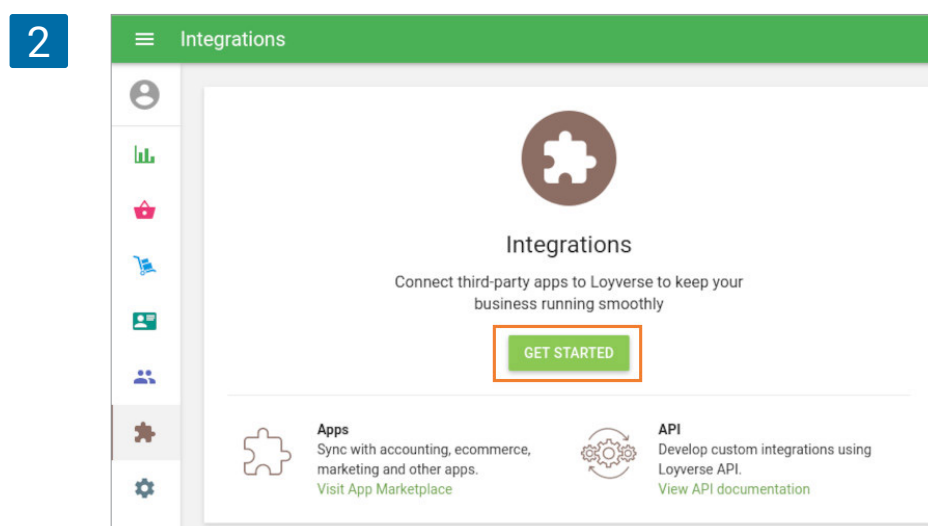
There are two options how to connect apps:

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.

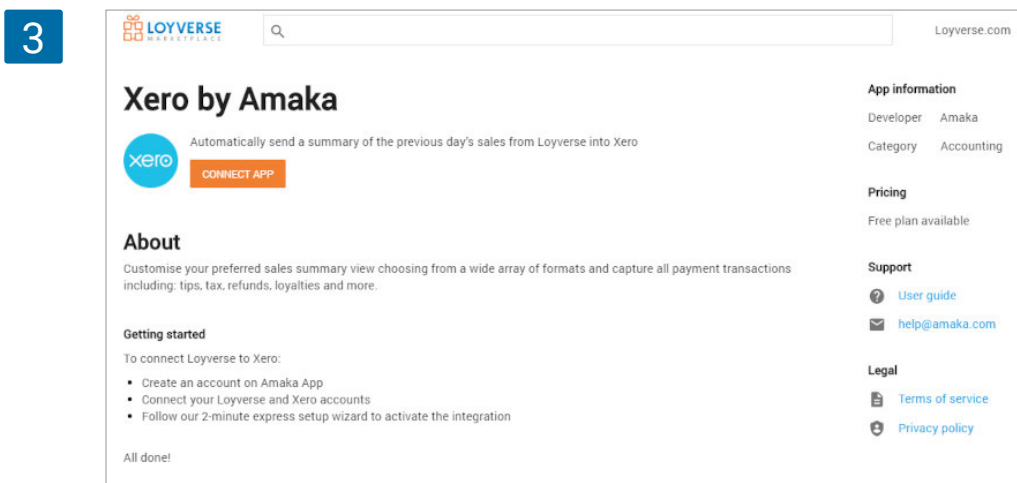
Enter the Back Office and open the 'Apps' section.



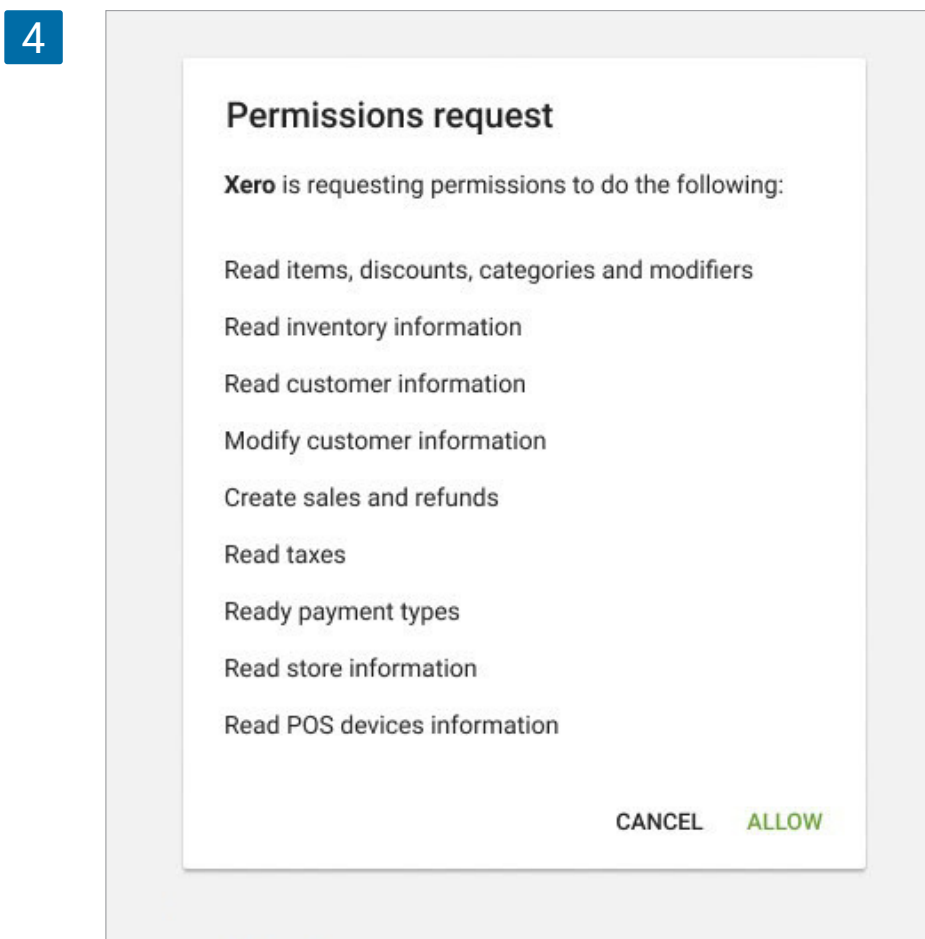
You have to start a trial period to use integrations features.



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.

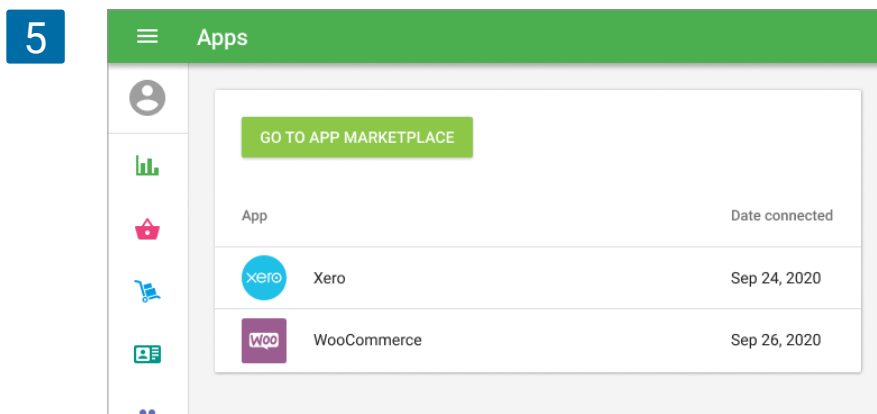


Follow the workflow of integration on the app developers' site. While processing the integration, you will be asked to grant access to your Loyverse account. The permission request form will contain the list of permissions this app needs. To confirm permission request and proceed, click the 'Allow' button.

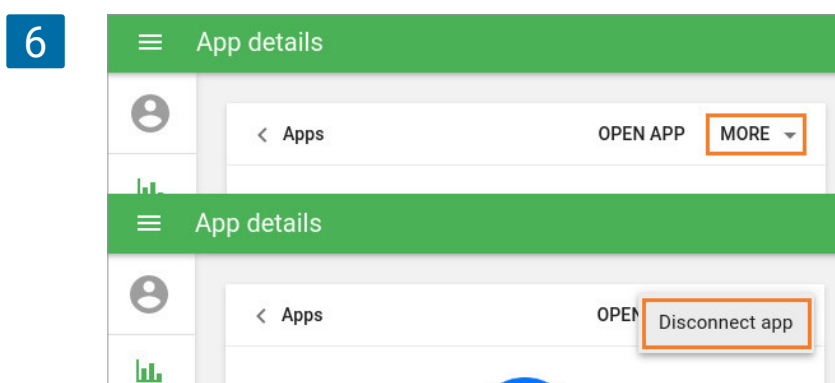


After that, you will be redirected to an app to continue the integration setup. Follow the steps of an integration setup and complete it. In most cases, you will have to create an account in another system.

All connected apps will be displayed in your Back Office in the 'Apps' section.



At any time, you can disable the application and deny it access to the account.



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
- and many others

#### Online ordering:

- UberEats
- Doordash
- Grubhub
- Zomato
- Glovo
- Rappi
- and many other regional players

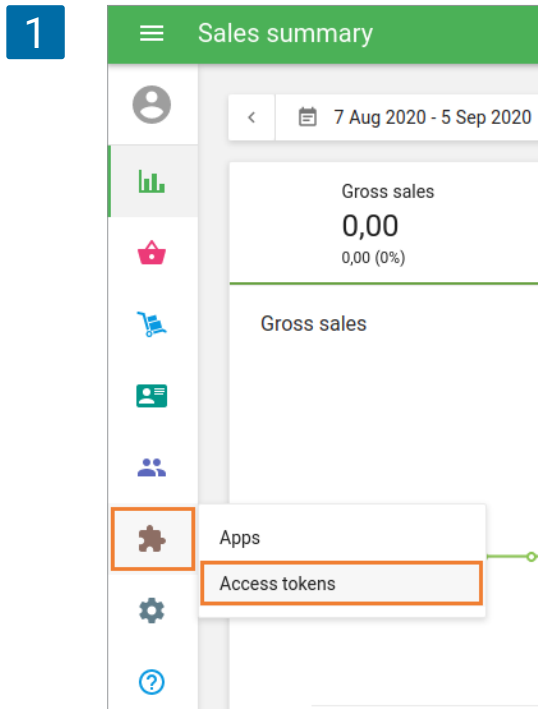
#### Marketing:

- Mailchimp
- Constant Contact
- Connectors:
- Google Data Studio
- Power BI
- Mailchimp
- Telegram
- Wave
- TradeGecko
- Google Drive
- Google Sheet

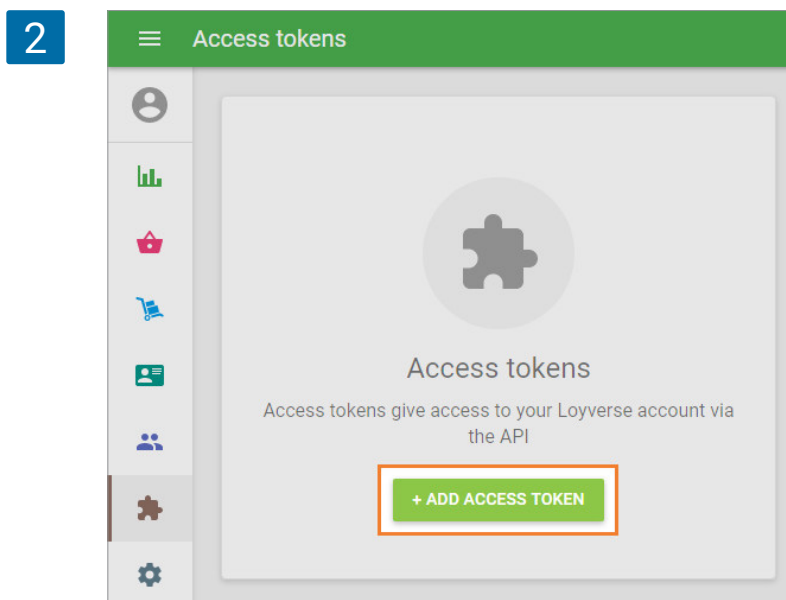
## 7.14 How to Create Tokens for API

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.

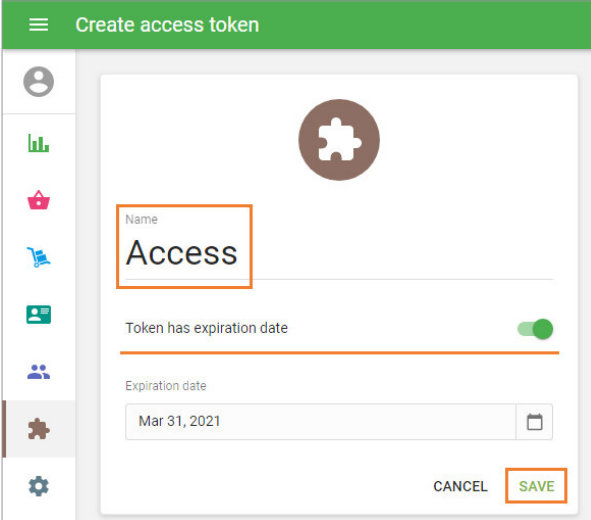


To create a new token, click on the '+ Add access token' button.



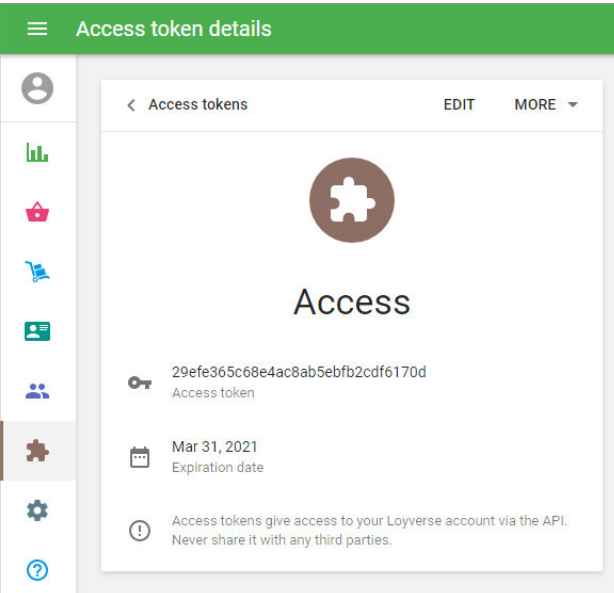
The form 'Create access tokens' will open for editing. Fill in the 'Name' field and set the token expiration date if needed. After clicking on the 'Save' button, the Access token will be created.

3



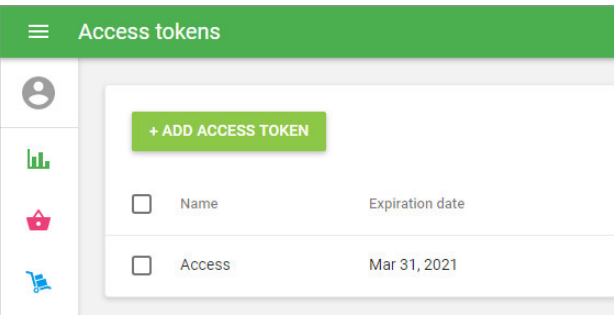
Here you can edit or delete the token and also copy the token for further use. If you delete the token, the access to the data by this token will be suspended. By clicking on the 'Access tokens,' you will return to the tokens list.

4



You can see created tokens and create new ones.

5



#### Note

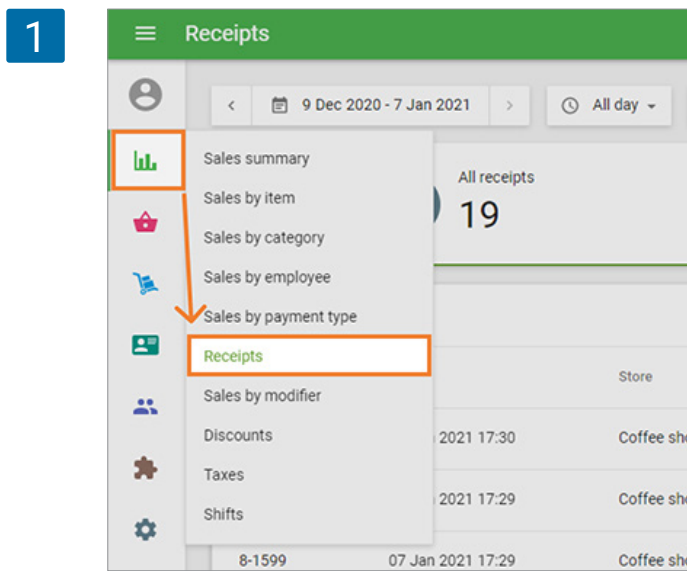
The token gives unlimited access to all resources provided by the Loyverse API. Up to 20 tokens can be created for one account.



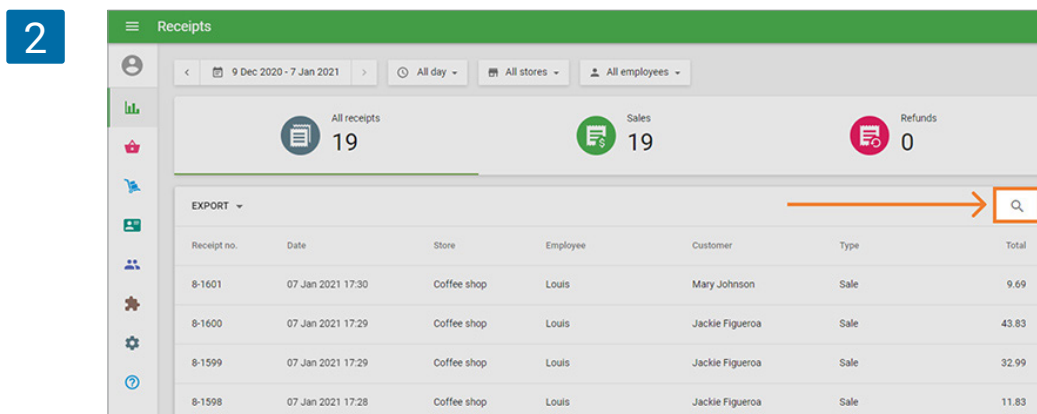
## 7.15 How to See the Purchase History of Registered Customers at the Back Office

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.

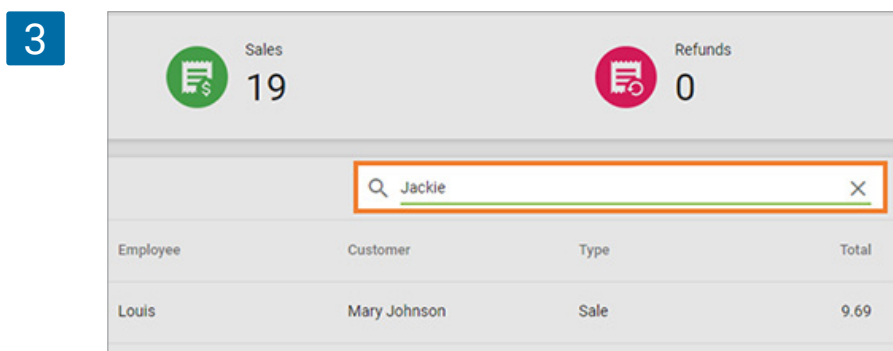
In the Back Office, go to the 'Receipts' section.



Click on the search icon.



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



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

4

Receipt no.	Date	Store	Employee	Customer	Type
8-1600	07 Jan 2021 17:29	Coffee shop	Louis	Jackie Figueroa	Sale
8-1599	07 Jan 2021 17:29	Coffee shop	Louis	Jackie Figueroa	Sale
8-1598	07 Jan 2021 17:28	Coffee shop	Louis	Jackie Figueroa	Sale
11-1013	06 Jul 2017 22:46	Coffee shop	Louis	Jackie Figueroa	Sale
1497	31 Dec 2015 19:00	Coffee shop	Louis	Jackie Figueroa	Sale

11.83 Total	
Cashier: Louis	
POS: POS 07	
Customer: Jackie Figueroa	
telfo_gall@bing.com	
<b>Dine in</b>	
Carrot Fresh 1 x 4.99	4.99
Cake 1 x 4.59	4.59
Croissant 1 x 2.25	2.25
Points balance	10.65
<b>Total</b>	<b>11.83</b>
Cash rounding	-0.17

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

Receipt no.	Date	Store	Employee	Customer	Type	Total
8-1601	07 Jan 2021 17:30	Coffee shop	Louis	Mary Johnson	Sale	9.69
8-1600	07 Jan 2021 17:29	Coffee shop	Louis	Jackie Figueroa	Sale	43.83
8-1599	07 Jan 2021 17:29	Coffee shop	Louis	Jackie Figueroa	Sale	32.99

9.69 Total	
Cashier: Louis	
POS: POS 07	
Customer: Mary Johnson	
Points balance	0.00
<b>Total</b>	<b>9.69</b>

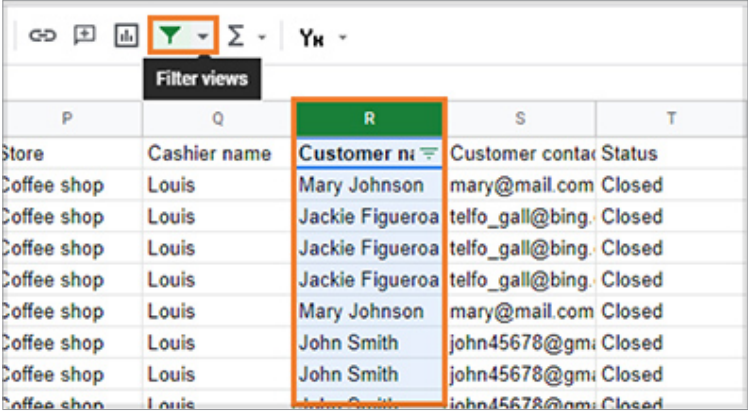
[Open the file in Google Sheets.](#)

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

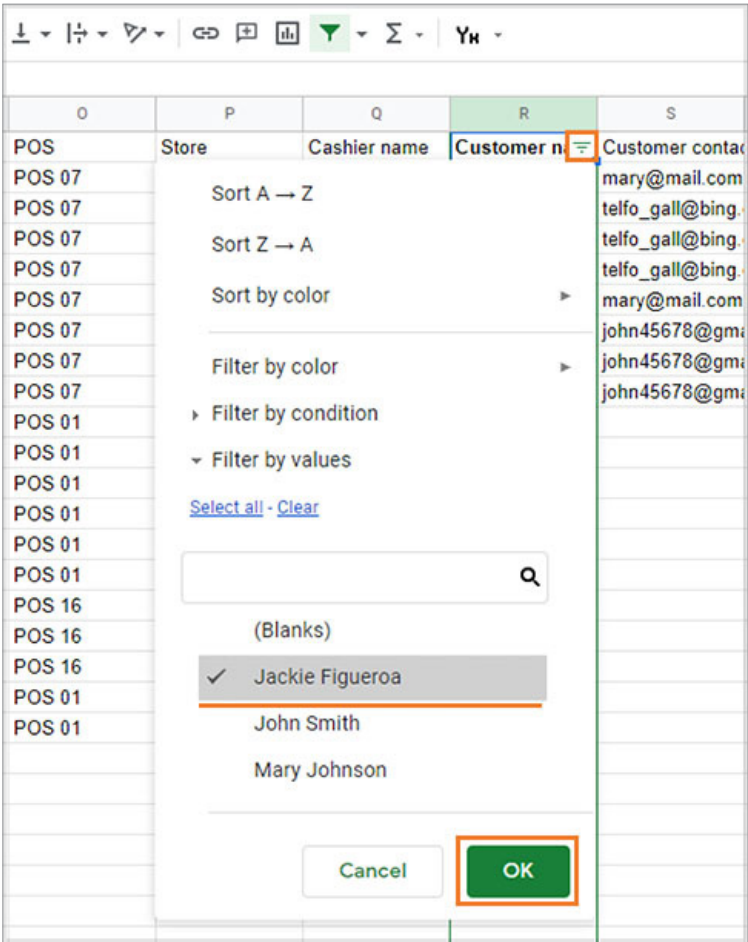


The screenshot shows a data table with columns P, Q, R, S, and T. Column R is labeled 'Customer name' and is highlighted with a green background. A filter icon (a green triangle with a downward arrow) is visible in the top right corner of the column header. A 'Filter views' dropdown menu is open, showing a list of customer names: Mary Johnson, Jackie Figueroa, and John Smith. The 'Customer name' column is also highlighted with a green border.

P	Q	R	S	T
Store	Cashier name	Customer name	Customer contact	Status
Coffee shop	Louis	Mary Johnson	mary@mail.com	Closed
Coffee shop	Louis	Jackie Figueroa	telfo_gall@bing.	Closed
Coffee shop	Louis	Jackie Figueroa	telfo_gall@bing.	Closed
Coffee shop	Louis	Jackie Figueroa	telfo_gall@bing.	Closed
Coffee shop	Louis	Mary Johnson	mary@mail.com	Closed
Coffee shop	Louis	John Smith	john45678@gm.	Closed
Coffee shop	Louis	John Smith	john45678@gm.	Closed
Coffee shop	Louis	John Smith	john45678@gm.	Closed

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

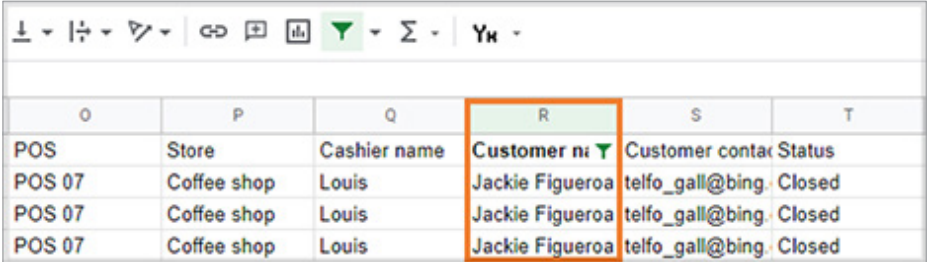


The screenshot shows the filter dropdown menu for the 'Customer name' column. The menu is open, displaying a list of customer names: Mary Johnson, Jackie Figueroa, and John Smith. The 'Customer name' column header is highlighted with a green background. The 'OK' button is highlighted with a green border.

O	P	Q	R	S
POS	Store	Cashier name	Customer name	Customer contact
POS 07		Sort A → Z		mary@mail.com
POS 07		Sort Z → A		telfo_gall@bing.
POS 07		Sort by color		telfo_gall@bing.
POS 07		Filter by color		telfo_gall@bing.
POS 07		Filter by condition		mary@mail.com
POS 07		Filter by values		john45678@gm.
POS 01		Select all - Clear		john45678@gm.
POS 01				john45678@gm.
POS 01				
POS 01				
POS 01				
POS 16				
POS 16				
POS 16				
POS 01				
POS 01				

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

9



The screenshot shows the data table after the filter is applied. The 'Customer name' column is highlighted with a green background. The table displays only the rows where the customer name is 'Jackie Figueroa'.

O	P	Q	R	S	T
POS	Store	Cashier name	Customer name	Customer contact	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



# 8. Settings

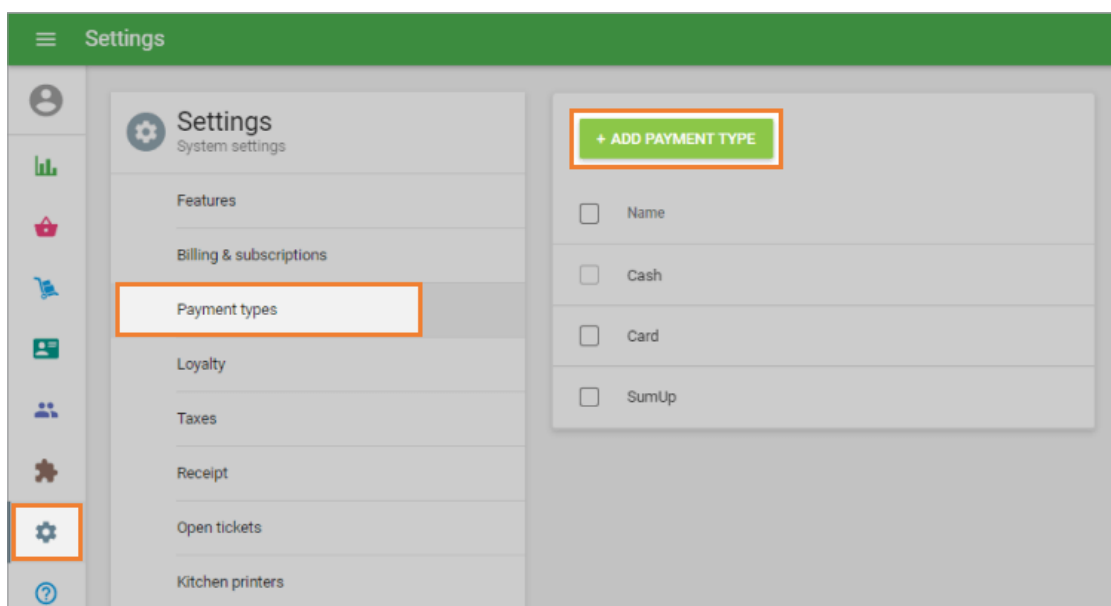


## 8.1 Configuring Payment Types in Loyverse POS

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.

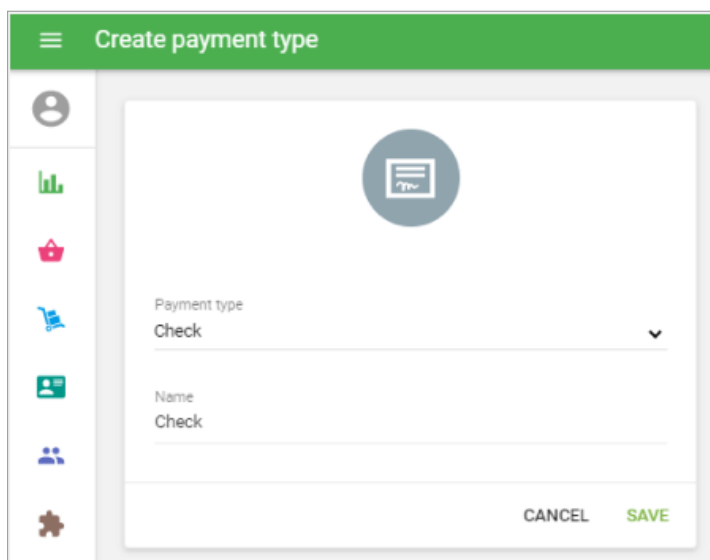
Log in to the Back Office, click the “Settings” menu and then “Payment types”. Click the “Add payment type” button to add a new type of payment.

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

Create payment type

Payment type

Check

Name

Check

Stores

Available in all stores

Shop

Store 2

SHOW LESS

CANCEL

SAVE

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

Ticket

Carrot Fresh x 1

4.99

Cookies x 1

5.69

Fruit Salad x 1

8.49

Tax

1.68

Total

20.85

←

SPLIT

20.85

Total amount due

Cash received

20.85

CHARGE

21.00

25.00

30.00

40.00

CARD

CHECK

SUMUP

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**

Ticket		← SPLIT	
Coca Cola x 2	30.00	435.57 Total amount due	
Americano x 1	15.00		
Chicken salad x 2	60.00		
Hamburger x 1	32.00		
Cheeseburger x 1	35.00		
Discounts	10.00		
Tax	16.20		Please enable payment types in <a href="#">settings</a>
<b>Total</b>	<b>178.20</b>		

The information about the payment type will be shown on the receipt.

**6**

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

Cashier: Rima  
POS: POS 1

---

Carrot Fresh 1 x 4.99	4.99
Cookies 1 x 5.69	5.69
Fruit Salad 1 x 8.49	8.49
<b>Subtotal</b>	<b>19.17</b>
Sales tax, 8.75%	1.68
<b>Total</b>	<b>20.85</b>
<b>Card</b>	<b>20.85</b>

Receipt currency: US Dollars  
6/4/2021 13:29 #52-1009

Finally, the "Sales by Payment Type" report in the Back Office will show your sales numbers sorted by payment type.

**7**

**Sales by payment type**

4 May 2021 - 4 Jun 2021 All day All stores All employees

EXPORT

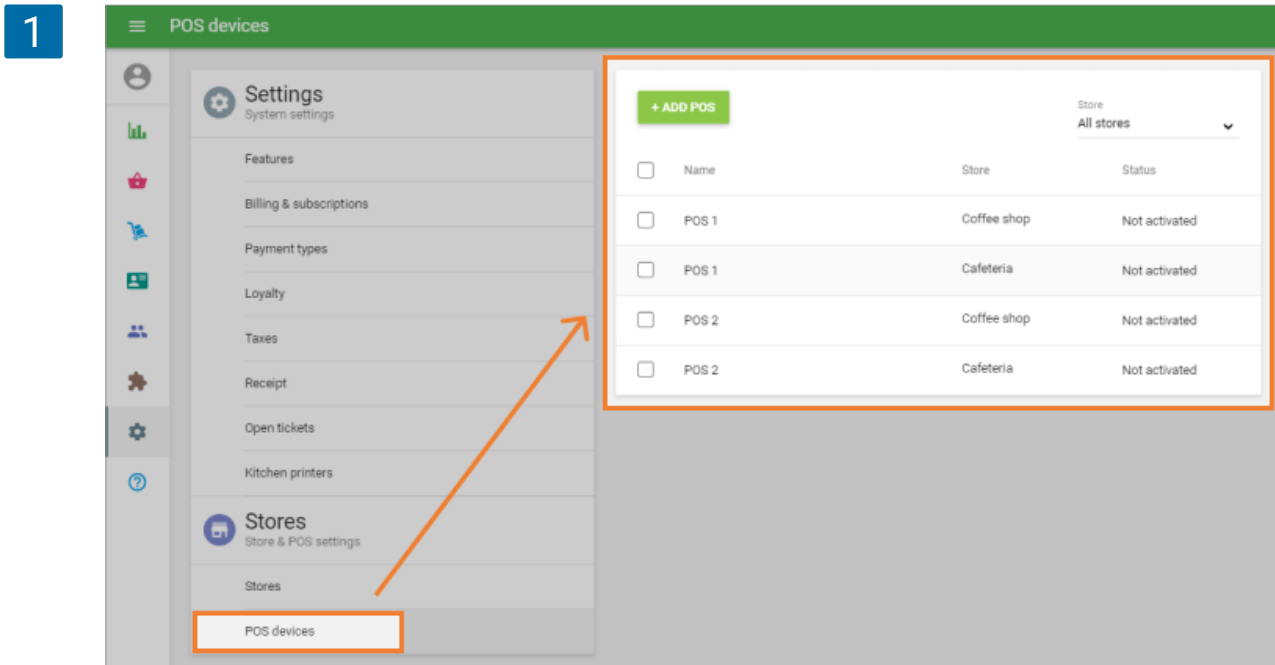
Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	1	20.85	0	0.00	20.85
Cash	17	881.97	0	0.00	881.97
<b>Total</b>	<b>18</b>	<b>902.82</b>	<b>0</b>	<b>0.00</b>	<b>902.82</b>

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.

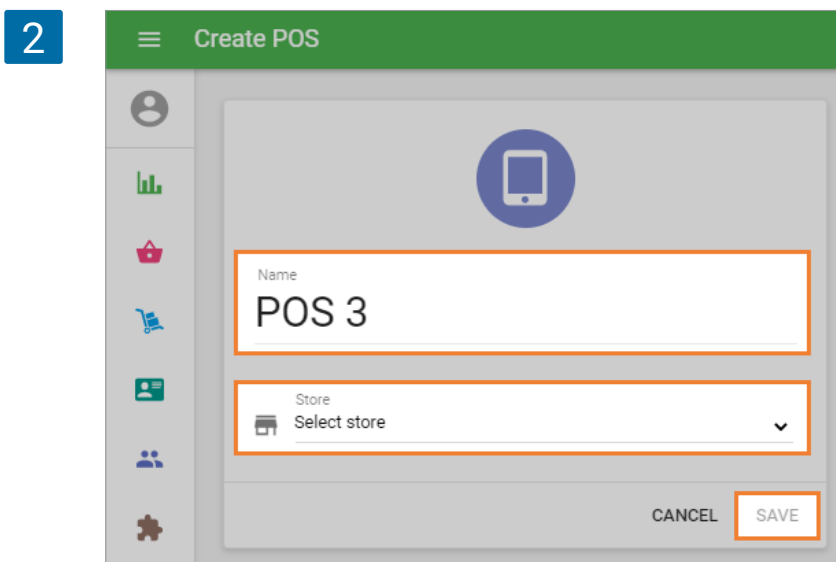
## 8.2 How to Create, Activate, Deactivate and Delete POS

### 8.2.1 How to Create new POS

At the Back Office you can add a new POS in the 'POS devices' section.



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.

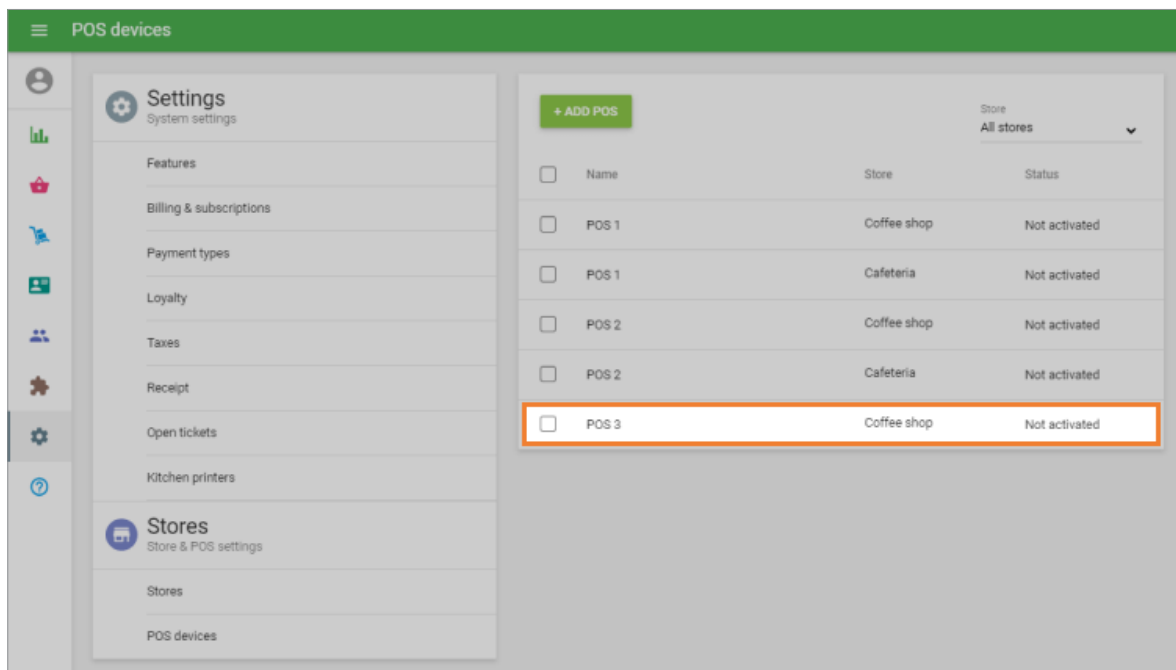




## 8.2.2 How to Activate POS

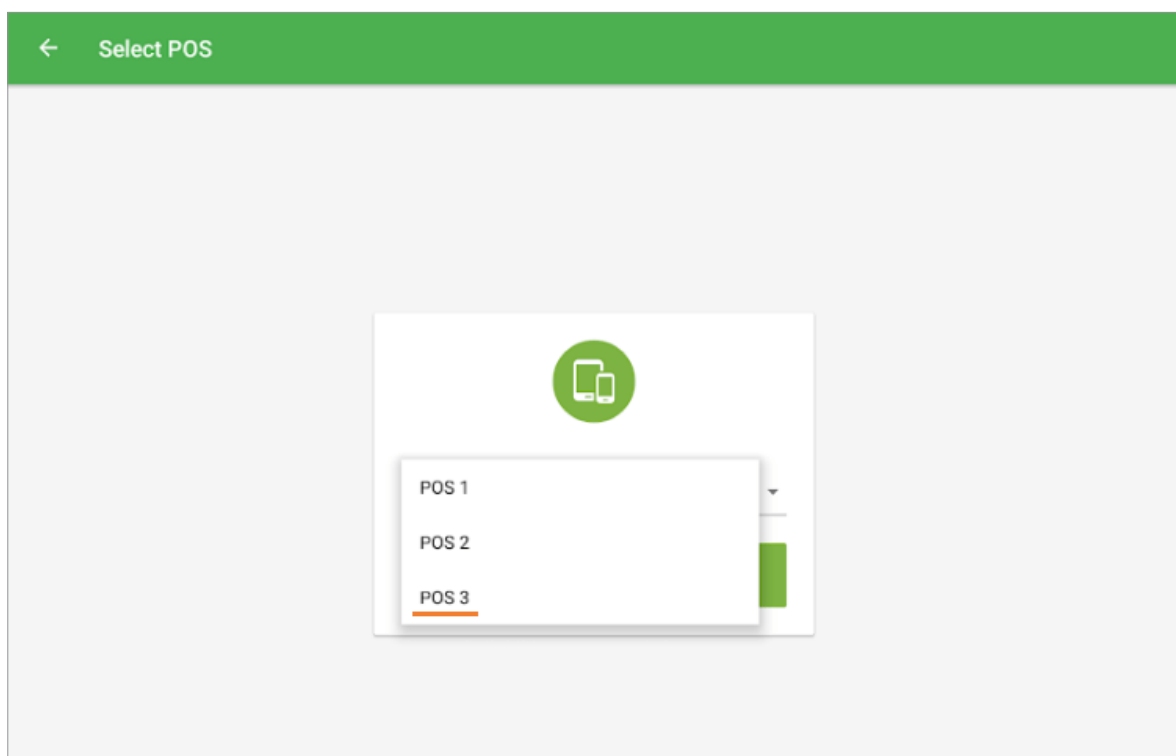
After you create a new POS at the Back Office, it will appear at the list of your POS devices, with the status 'Not Activated'.

1

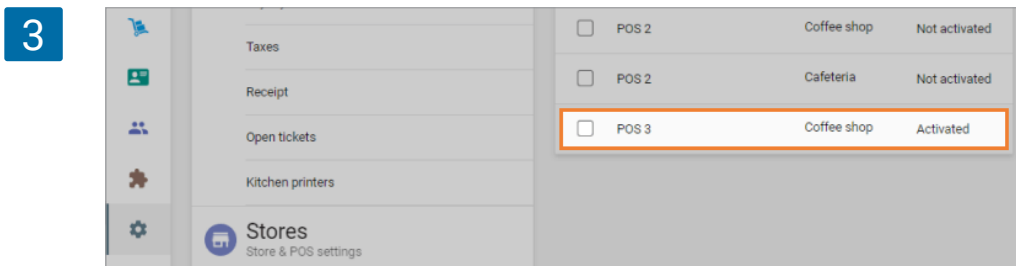


To activate it you have to login to your new POS on your mobile device with the E-mail and password of the store owner. After that the owner can [switch the user account to a different employee](#).

2

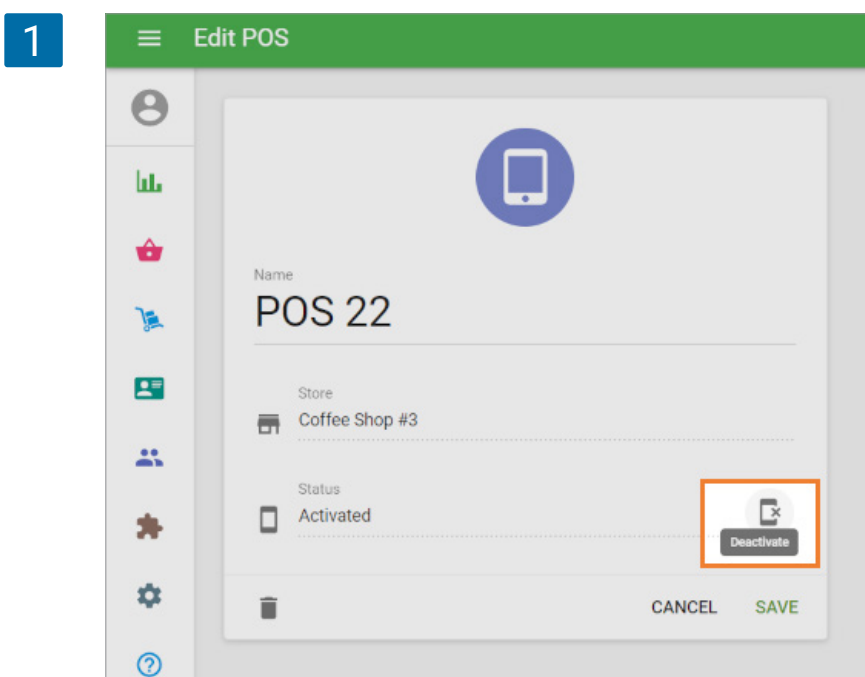


Afterwards, in your Back Office, the new POS will change its status to Activated.

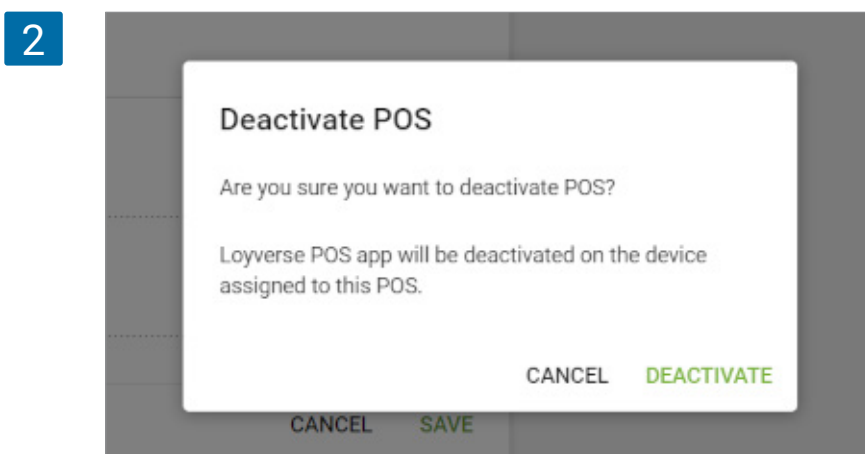


### 8.2.3 How to Deactivate POS

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.



Confirm your intention by clicking on the 'Deactivate' button in the dialog window.



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

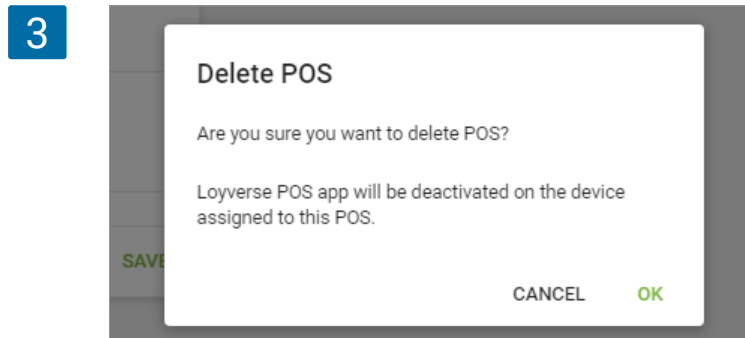
The screenshot shows the 'Receipts' screen in the Back Office. The top bar is green with a hamburger menu icon and the text 'Receipts'. Below the bar, there are filters for date range (4 May 2021 - 2 Jun 2021), time (All day), store (All stores), and employee (All employees). The main content area shows a summary of receipts (18) and sales (18). Below this is a table of receipts with columns: Receipt no., Date, Store, Employee, and Customer. The receipt with ID 58-1000, dated 02 Jun 2021 12:06, from 'Coffee shop' and 'Owner' is highlighted with an orange box. To the right of the table, a detailed view of the selected receipt is shown, including the total amount of 22.80 and a list of items: Banana (3.00), Cherry cake (14.50), and Capuccino (5.30).

To delete POS find it in the 'POS devices' list, enter it for editing and click the trash icon.

2

The screenshot shows the 'Edit POS' screen in the Back Office. The top bar is green with a hamburger menu icon and the text 'Edit POS'. Below the bar, there is a large blue circle containing a white smartphone icon. The main content area is a form with two fields: 'Name' with the value 'POS 3' and 'Store' with the value 'Coffee shop'. At the bottom left, there is a trash icon highlighted with an orange box. At the bottom right, there are two buttons: 'CANCEL' and 'SAVE'.

In the pop up window, confirm your intentions by clicking on 'OK' button.



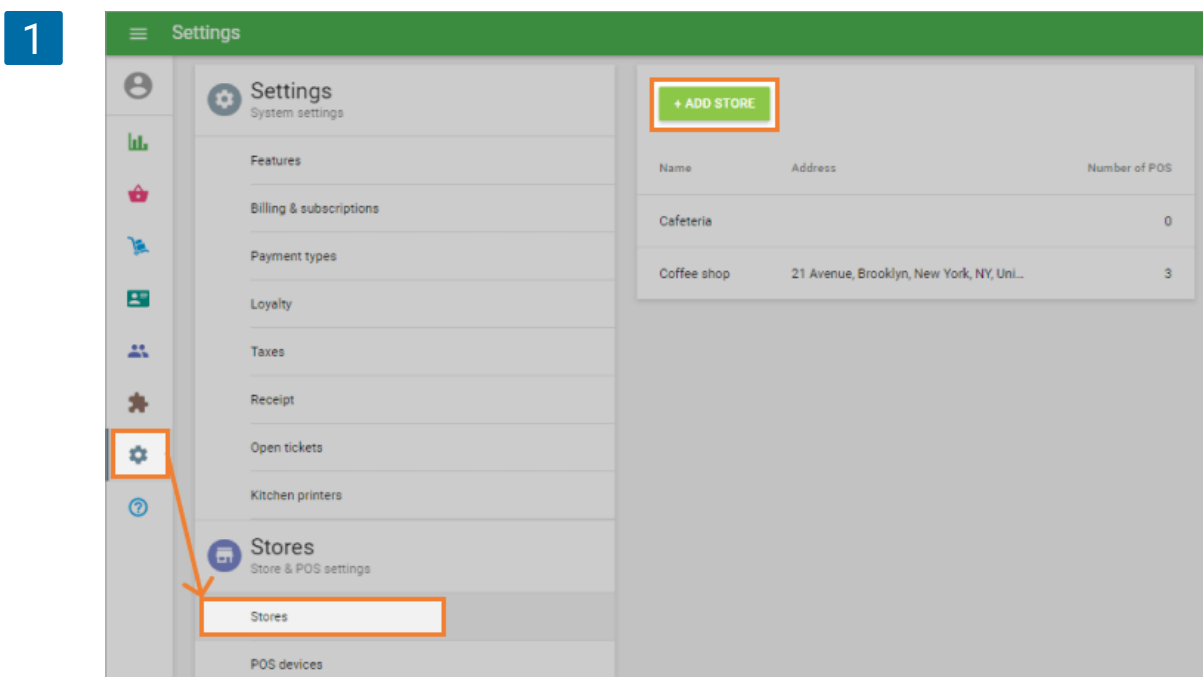
After you delete your POS at the back office, you will still have all of the receipts created on this POS, if they were synchronized before the deletion. However, this POS will be deactivated on the device.

## 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.



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

Available	Store	Price	In stock	Low stock	Optimal stock
<input checked="" type="checkbox"/>	Cafeteria	12.50	0		
<input checked="" type="checkbox"/>	Coffee shop	12.50	100	3	

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

Item name	Category	Store	Cost	Margin	In stock
Apple	Fruits	Variable	15.69	—	20
Apple Juice	Drinks	Variable	2.50	—	72
Banana	Fruits	Variable	1.88	—	36

## 8.3.3 Employee management

1

Name: Tim

Email: falino@tafmail.com

Phone:

Role: Cashier

POS PIN: 7 7 7 7

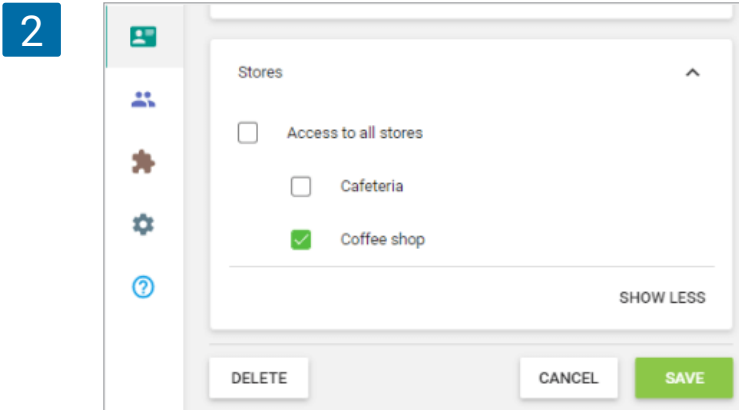
First login to the back office Monday, 31 May 2021

Stores: Access to 1 store

DELETE CANCEL SAVE

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.

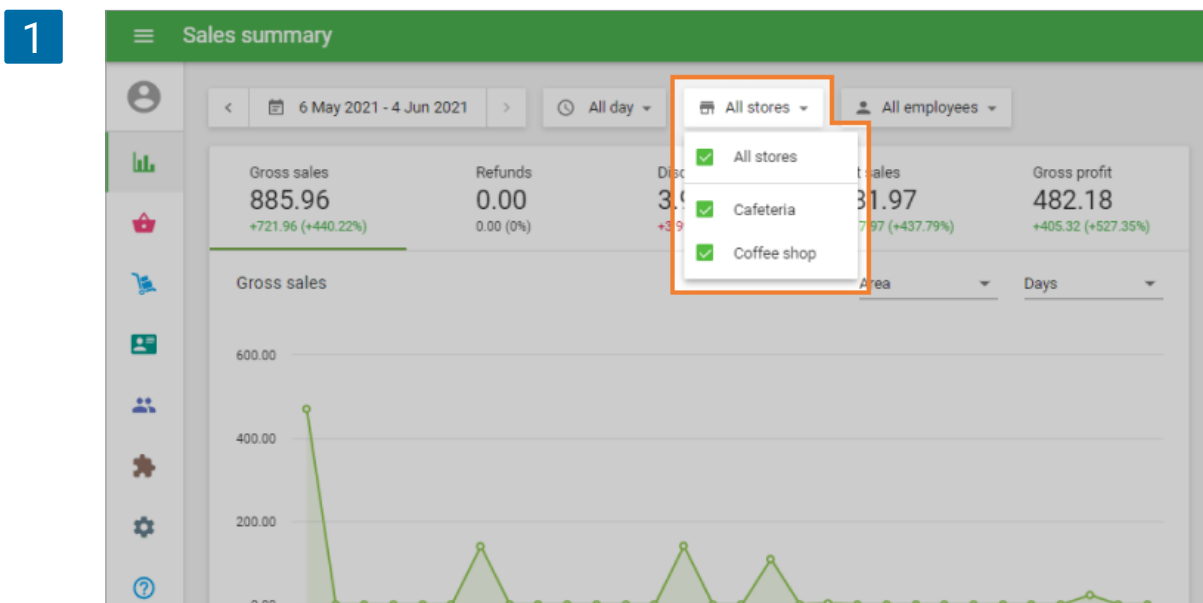
Afterward, an additional window will slide down with the list of your stores. You can assign your employee to a particular store.



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.



### 8.3.5 Customers

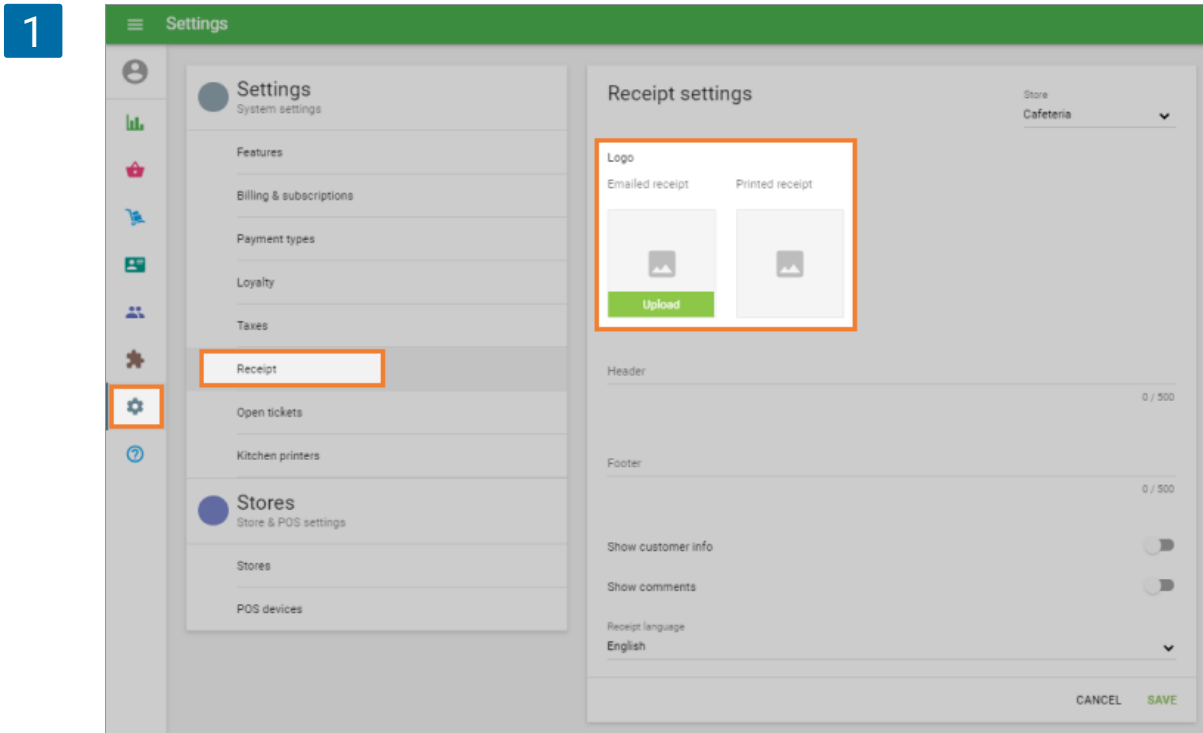
You can easily manage your clients at the Back office in a single list, across all of your stores for the loyalty program.

Customers are visible, and customer points are available for redemption in all of your stores.

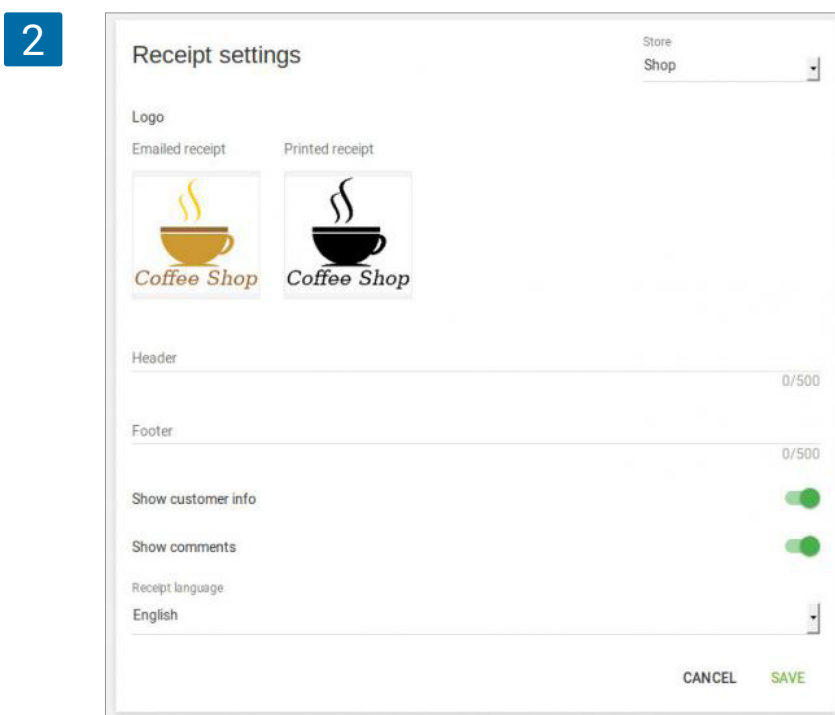
## 8.4 How to Add Logo to the Receipts

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.

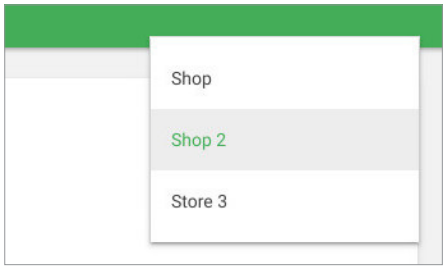


Logo for 'Printed receipt' should be a black and white image. If you upload the color logo, the system will generate a black and white picture from it.



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.

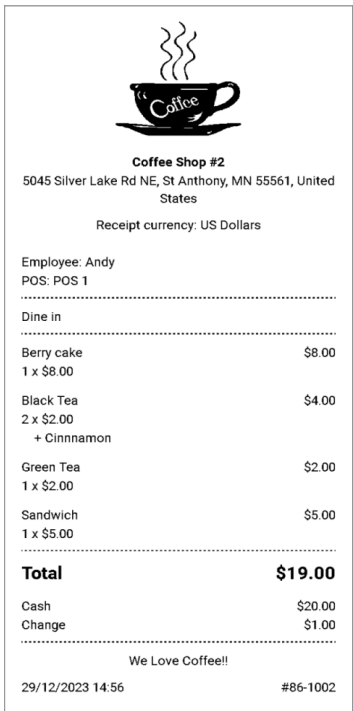
3



Don't forget to save your changes.

Now your printed logo will appear on the printed receipts as shown below:

4

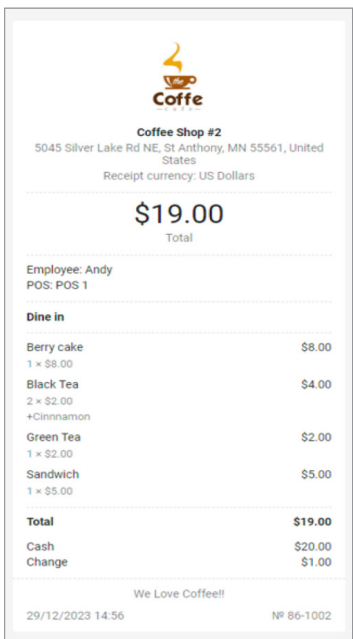


Note

Logo will not be printed on receipts and bills if the *Text mode* is selected in *Advanced* printer settings.

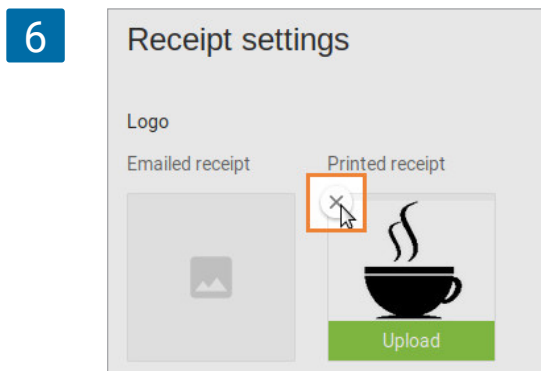
The logo for Emailed receipt will appear on e-receipts.

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.

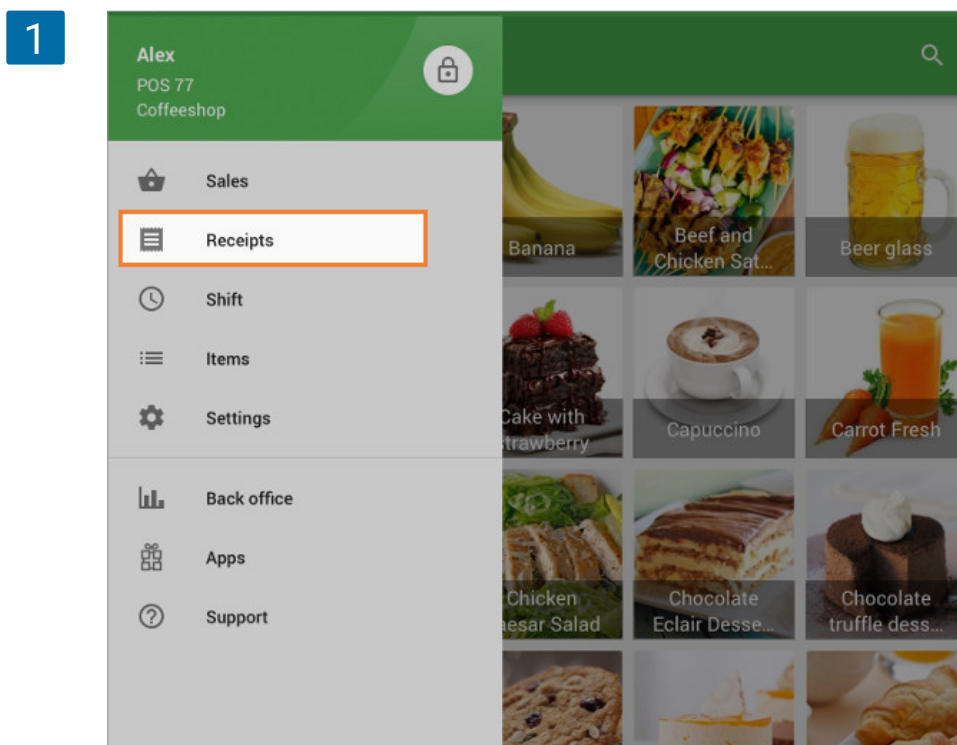


## 8.5 How to Sign out from Loyverse POS

### Note

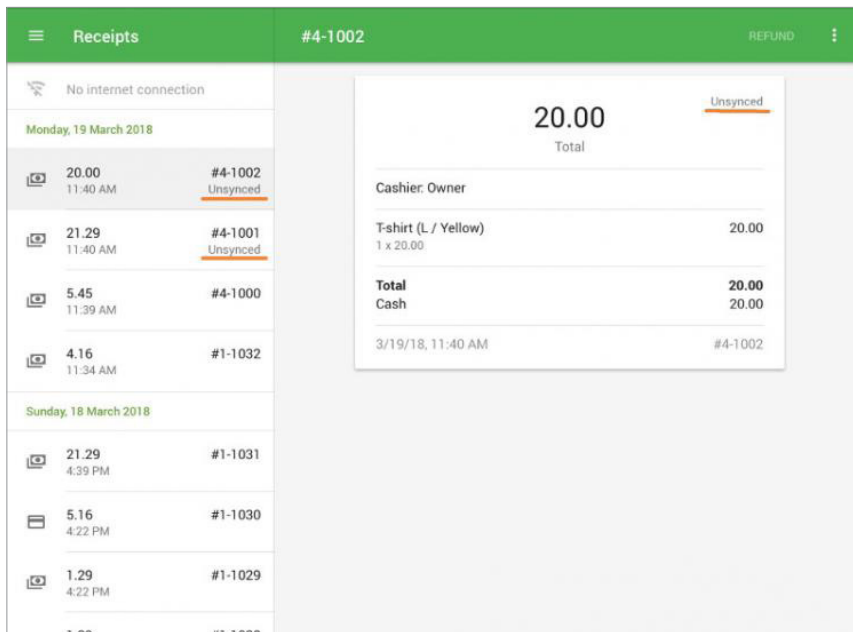
Note! If you make sales and sign out while your device has been disconnected from the Internet (offline mode), you can lose your receipts. So, before signing out from Loyverse POS, make sure that all your receipts have been transferred to the Back Office.

To do this, go to the 'Receipts' section.



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.

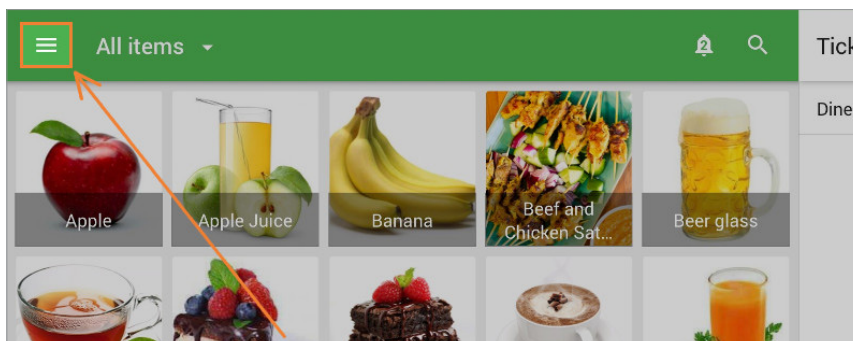
2



Try to restore the Internet connection and get the list of all receipts synced.

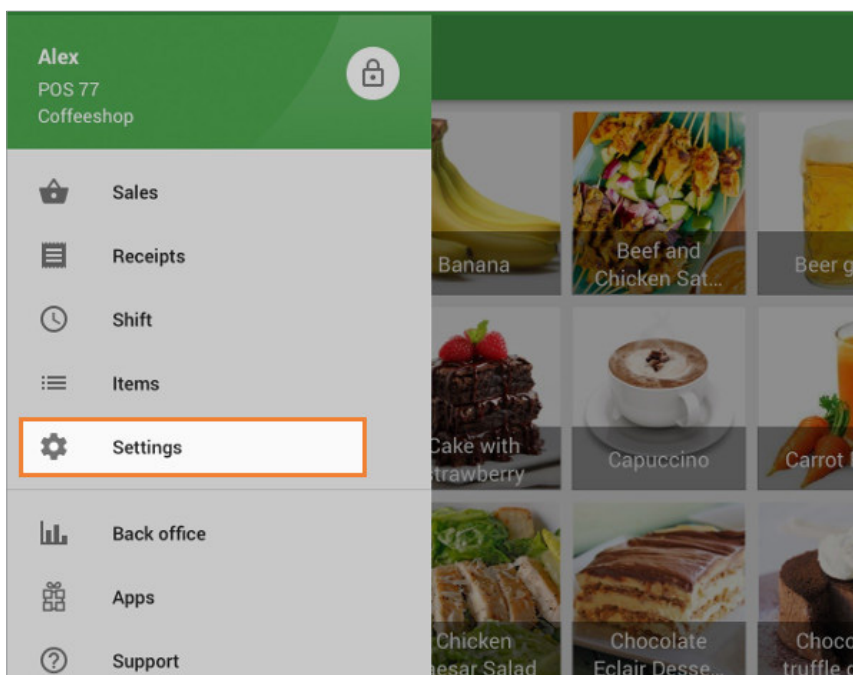
To sign out from your account, go to Menu.

3

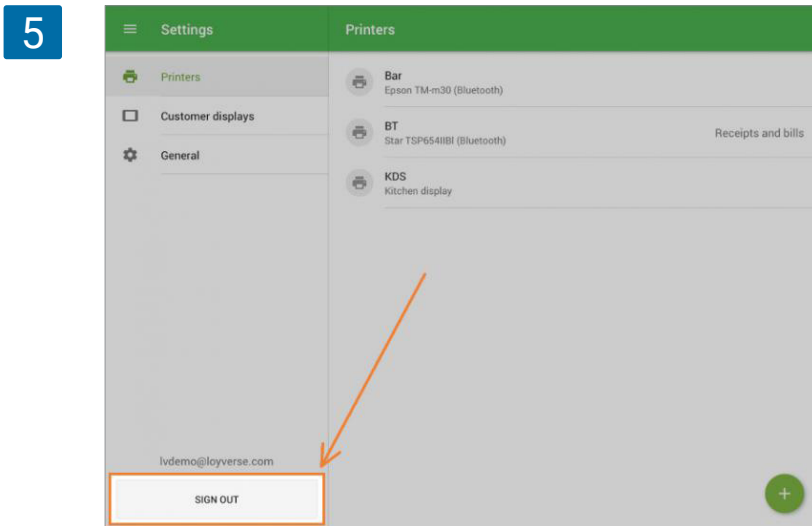


Select 'Settings'.

4

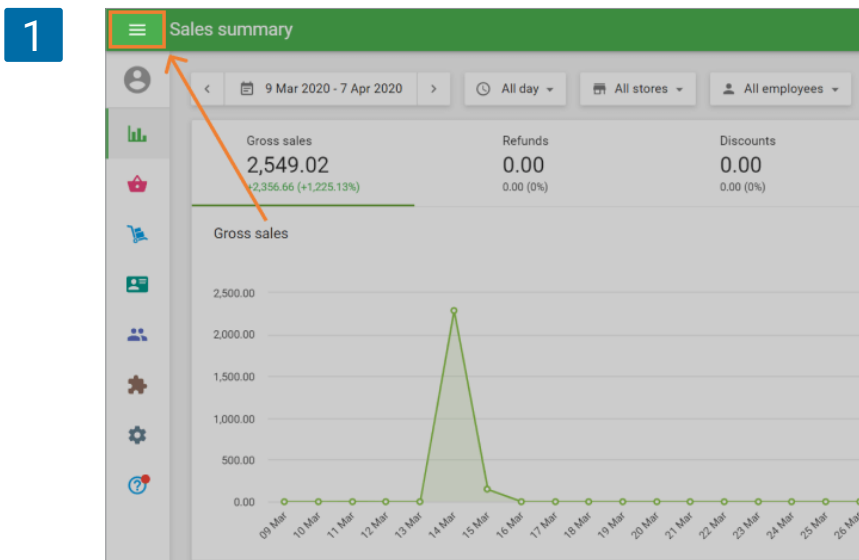


Click 'Sign out' button.

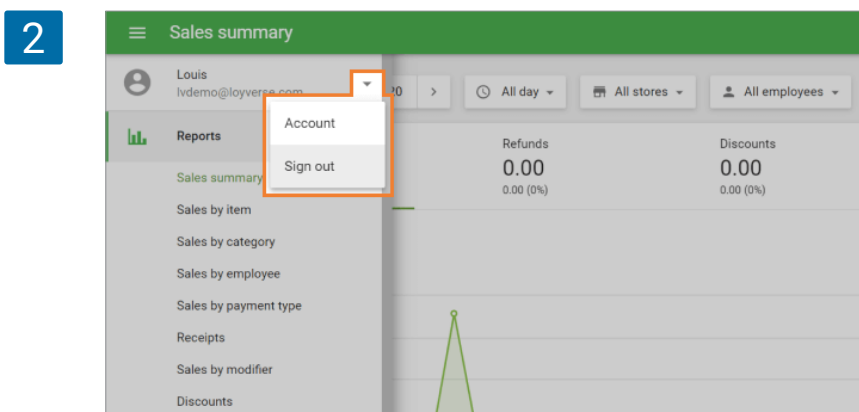


## 8.6 How to Exit from Back Office

For sign out from your account in [Back office](#), go to menu.



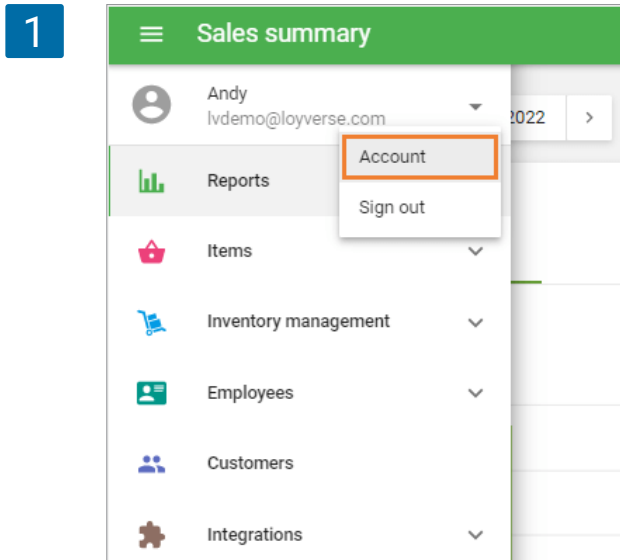
By clicking on account email you will see drop down button 'Sign out'. Click on it.



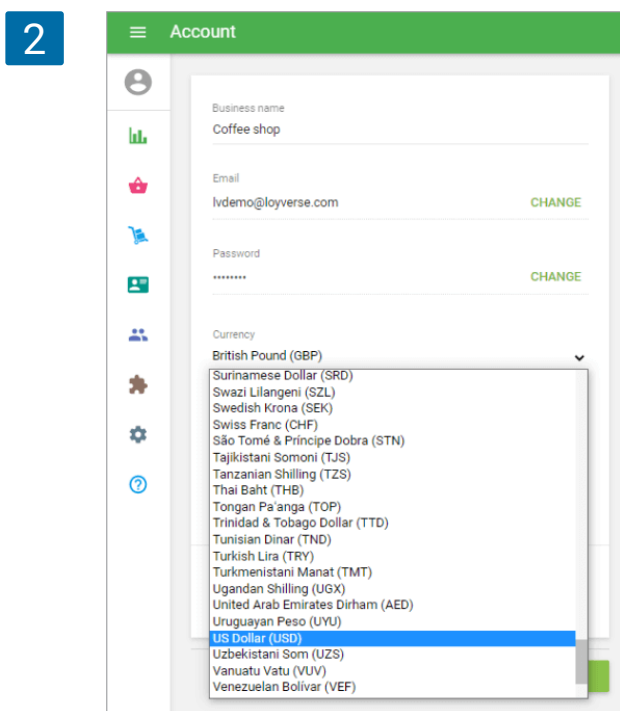
## 8.7 How to Set the Currency

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.



Select the needed currency in the 'Currency' field.

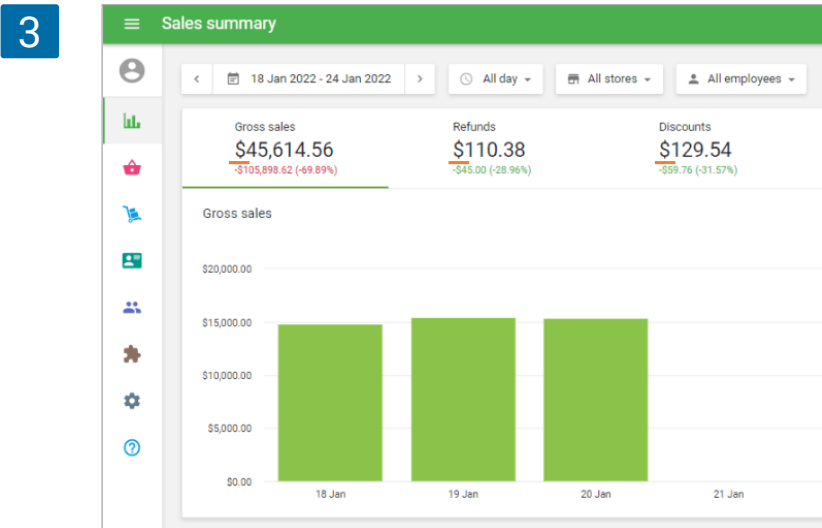


Do not forget to save changes.

### 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.



And also in the price and cost fields in the Back office.

4

☒ The item is available for sale

Sold by: ☒ Each ☐ Weight/Volume

Price: \$12.00 | Cost: \$5.00

Leave the field blank to indicate the price upon sale

SKU: 10021 | Barcode:

The currency symbol will also be shown with all monetary values in the POS, Dashboard, and CDS.

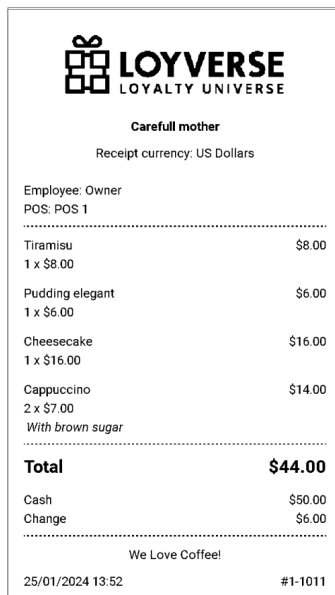
5

**All items**

Item	Price
Cake with strawberry x 1	\$7.70
Cheese x 1	\$8.00
Banana cake x 1	\$4.00
Capuccino x 1	\$4.50
Milk	
Tax (included)	
<b>Total</b>	<b>\$24.20</b>

**SAVE** **CHARGE**

And on the printed receipts and bills.



### Note

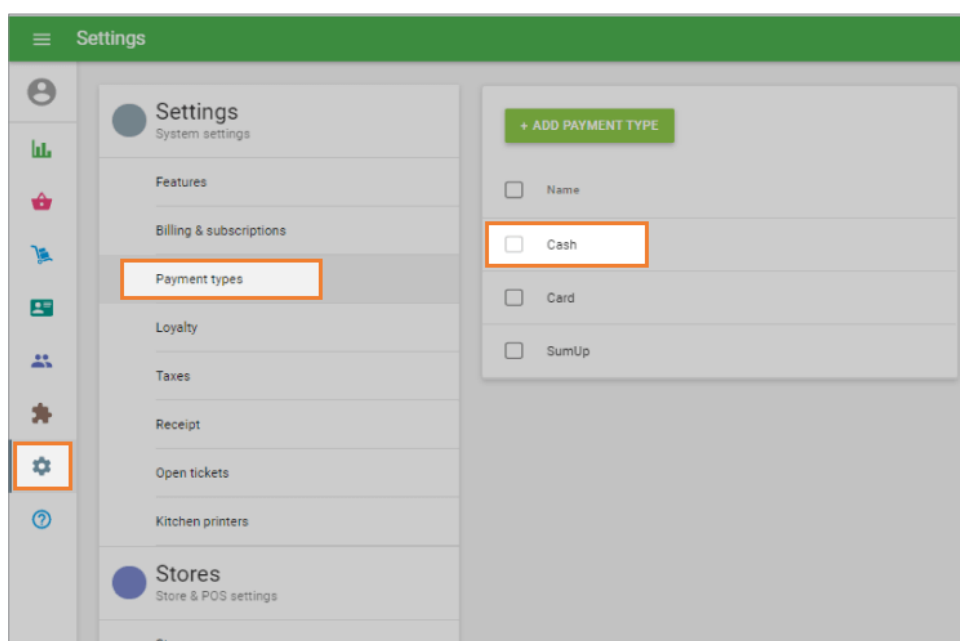
If you change the currency of the account, you have to sign out from Loyverse POS and then sign in again to apply the changes on each POS.

## 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.



The form 'Edit payment type' will open for editing.

2

≡ Edit payment type

👤

📊

🛒

🚚

🏠

👥

🔧

❓

📄

Payment type

Cash

Name

Cash

Rounding interval

0.01

Cash payment amount will round to this denomination

CANCEL

SAVE

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

🏠

👥

🔧

❓

Name

Cash

0.01

0.05

0.10

0.50

1.00

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

👥

🔧

❓

Cash

Rounding interval

1.00

Cash payment amount will round to this denomination

Round to the nearest value (0.50 up)

Round to the nearest value (0.50 down)

Always round up

Always round down

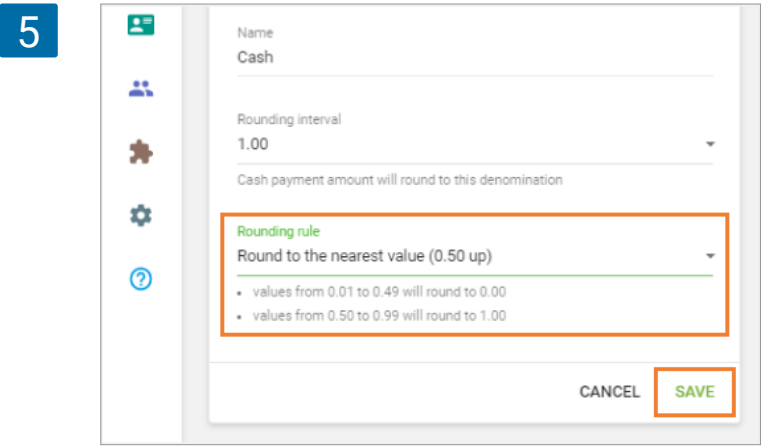
8.8 How to Work with Cash Rounding

251

By default, the rule ‘Round to the nearest value (average value up)’ is selected, but you can also choose:

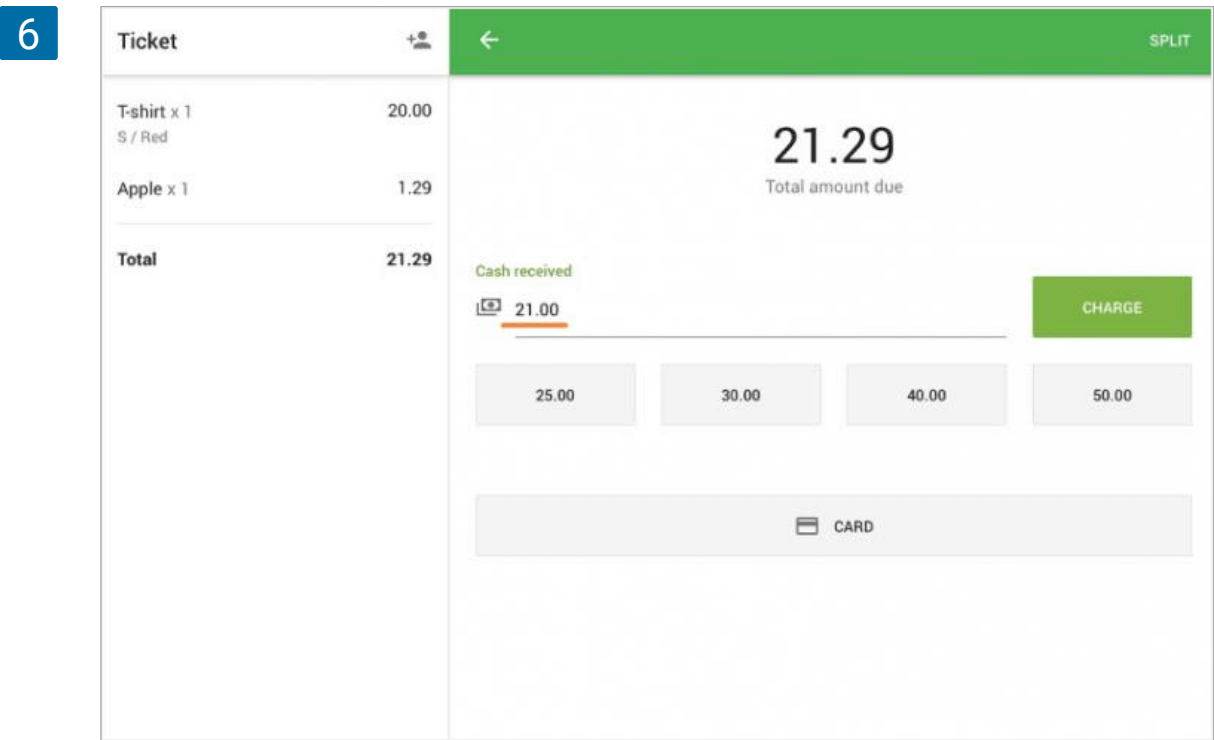
- Round to the nearest value (average value down)
- Always round up
- Always round down

You will see the explanation of how the selected rounding rule works.



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.





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

Ticket

T-shirt x 1  
S / Red

20.00

Apple x 1

1.29

Total

21.29

21.00  
Total paid

4.00  
Change

Enter email

SEND RECEIPT

The receipt contains information about rounding.

8

Receipts

#29-1004

REFUND

Search

Thursday, May 23, 2019

21.29  
4:55 PM

#29-1004

69.52  
4:09 PM

#8-1565

Wednesday, May 22, 2019

842.39  
11:08 AM

#11-1216

23.39  
11:08 AM

#11-1215

Tuesday, May 14, 2019

16.50  
7:31 PM

#11-1214

17.92  
4:10 PM

#11-1213

21.29  
Total

Cashier: Alex  
POS: POS 09

T-shirt (Red / S)  
1 x 20.00

20.00

Apple  
1.000 x 1.29

1.29

Total

21.29

Cash rounding

0.29

Cash

25.00

Change

4.00

5/23/19 4:55 PM

#29-1004

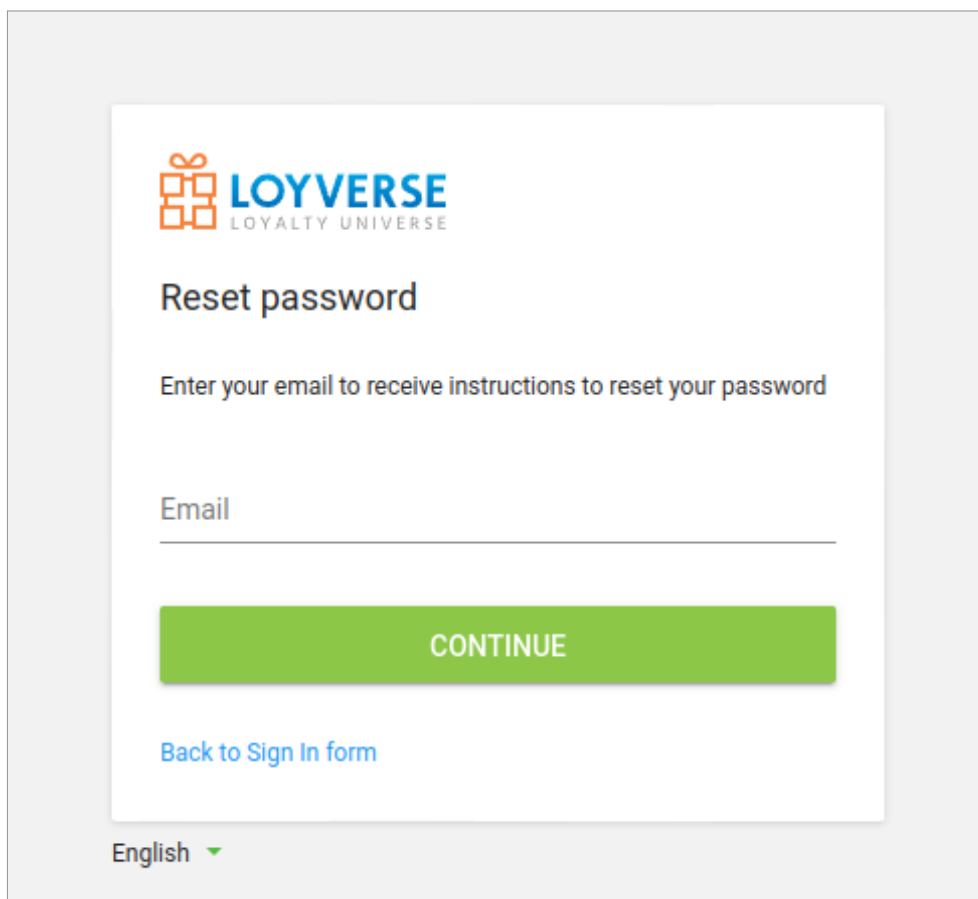
You will also see the information about rounding in the Sales by Payment Type report in the Back Office.

9

Sales by payment type

Type your Email into the Reset password form and press the 'Continue' button.

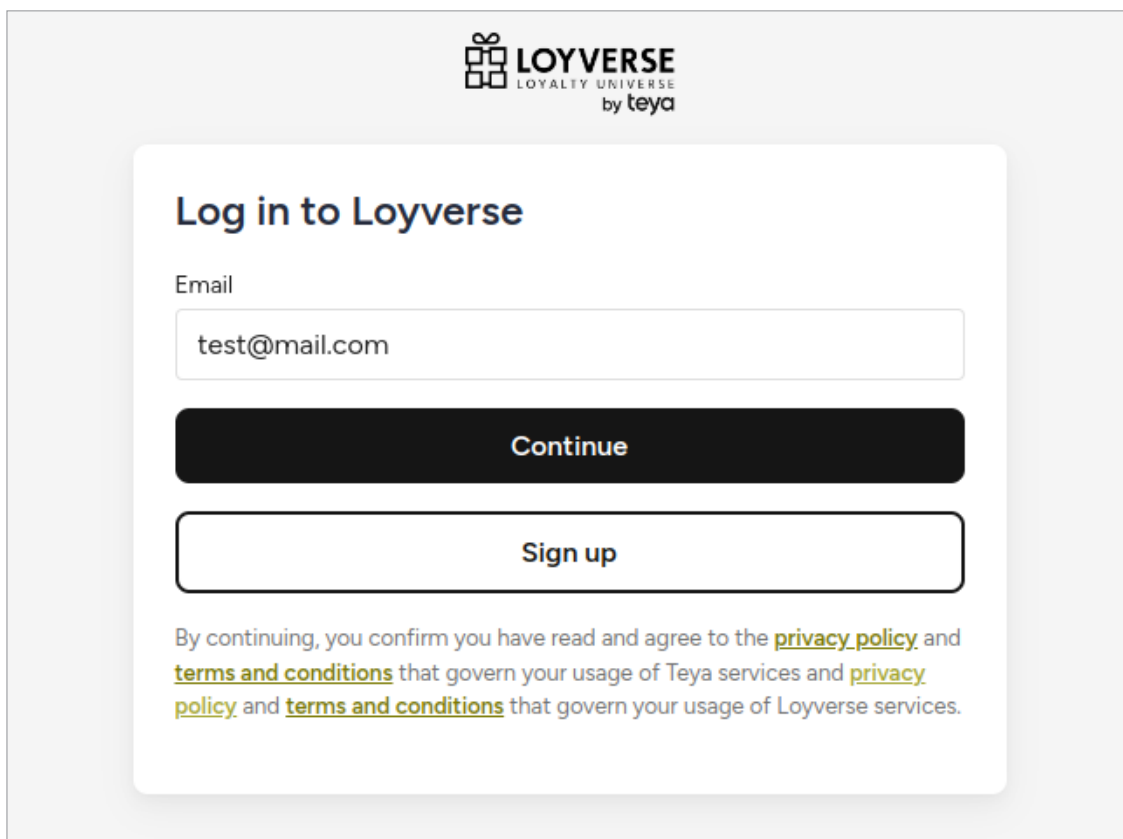
2



The screenshot shows a web form for resetting a password. At the top left is the Loyverse logo, which consists of an orange icon of three stacked cubes followed by the text "LOYVERSE" in blue and "LOYALTY UNIVERSE" in smaller grey text below it. Below the logo, the heading "Reset password" is displayed in a bold, dark grey font. Underneath the heading is a line of text: "Enter your email to receive instructions to reset your password". Below this is a text input field with the placeholder text "Email". A large, solid green button with the word "CONTINUE" in white capital letters is positioned below the input field. At the bottom left of the form, there is a blue link that says "Back to Sign In form". At the very bottom of the page, below the form, is the word "English" followed by a small downward-pointing triangle icon.

Check your email and click on the "Continue" button.

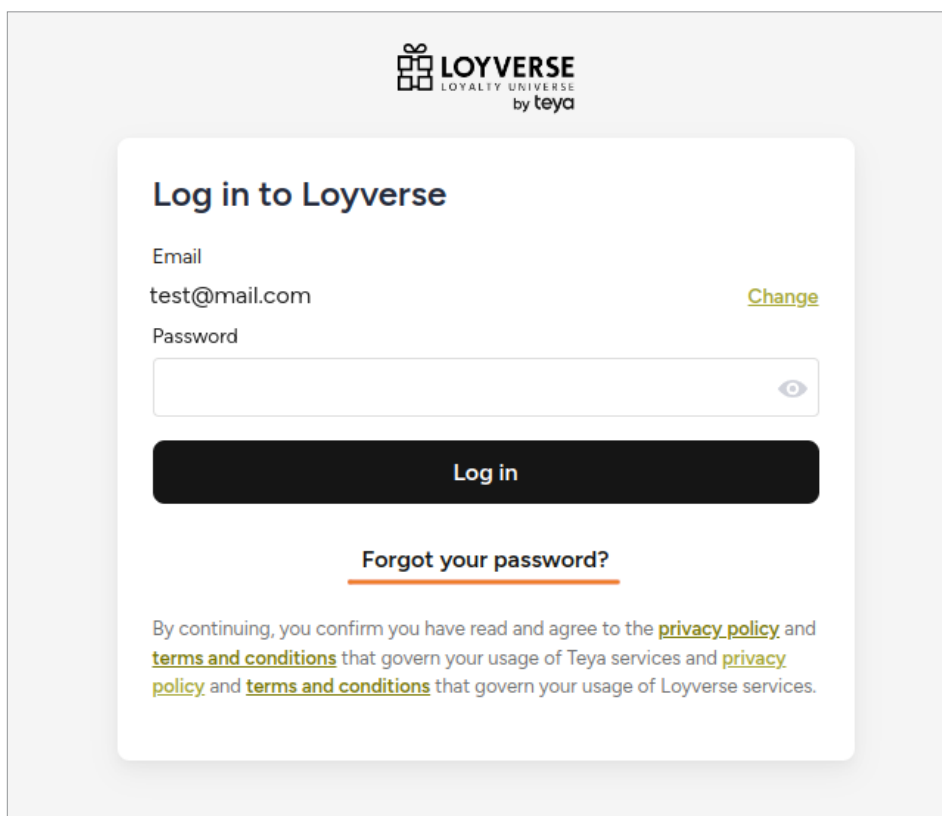
3



The screenshot shows a web form for logging in to Loyverse. At the top center is the Loyverse logo, which consists of an orange icon of three stacked cubes followed by the text "LOYVERSE" in blue and "LOYALTY UNIVERSE" in smaller grey text below it, with "by teya" in a smaller font below that. Below the logo, the heading "Log in to Loyverse" is displayed in a bold, dark blue font. Underneath the heading is a text input field with the placeholder text "Email". The input field contains the text "test@mail.com". Below the input field are two buttons: a solid black button with the word "Continue" in white, and a white button with a black border and the words "Sign up" in black. Below the buttons is a paragraph of text: "By continuing, you confirm you have read and agree to the [privacy policy](#) and [terms and conditions](#) that govern your usage of Teya services and [privacy policy](#) and [terms and conditions](#) that govern your usage of Loyverse services."

Click on the 'Forgot your password?' link.

4



**LOYVERSE**  
LOYALTY UNIVERSE  
by teya

## Log in to Loyverse

Email  
test@mail.com [Change](#)

Password

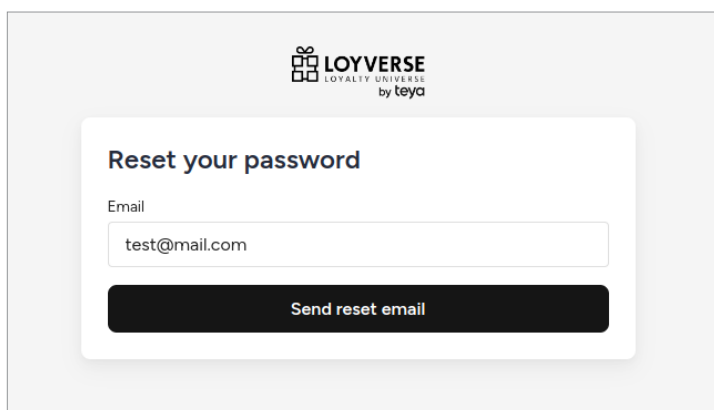
**Log in**

[Forgot your password?](#)

By continuing, you confirm you have read and agree to the [privacy policy](#) and [terms and conditions](#) that govern your usage of Teya services and [privacy policy](#) and [terms and conditions](#) that govern your usage of Loyverse services.

Click on the "Send reset email" button.

5



**LOYVERSE**  
LOYALTY UNIVERSE  
by teya

## Reset your password

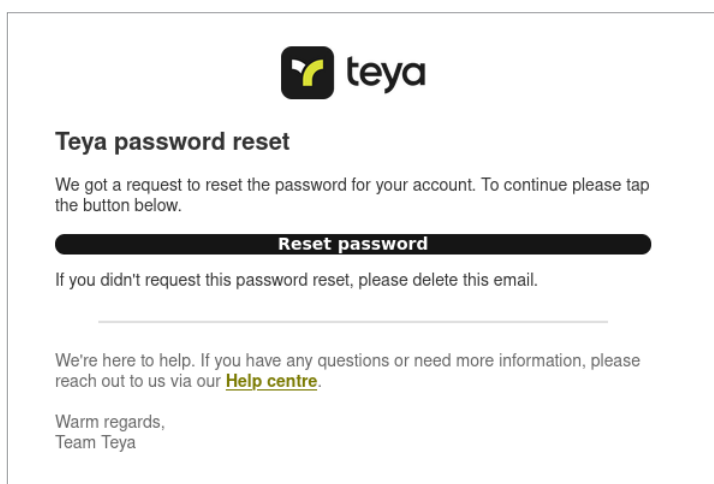
Email

test@mail.com

**Send reset email**

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 'Reset password' link.

6



**teya**

## Teya password reset

We got a request to reset the password for your account. To continue please tap the button below.

**Reset password**

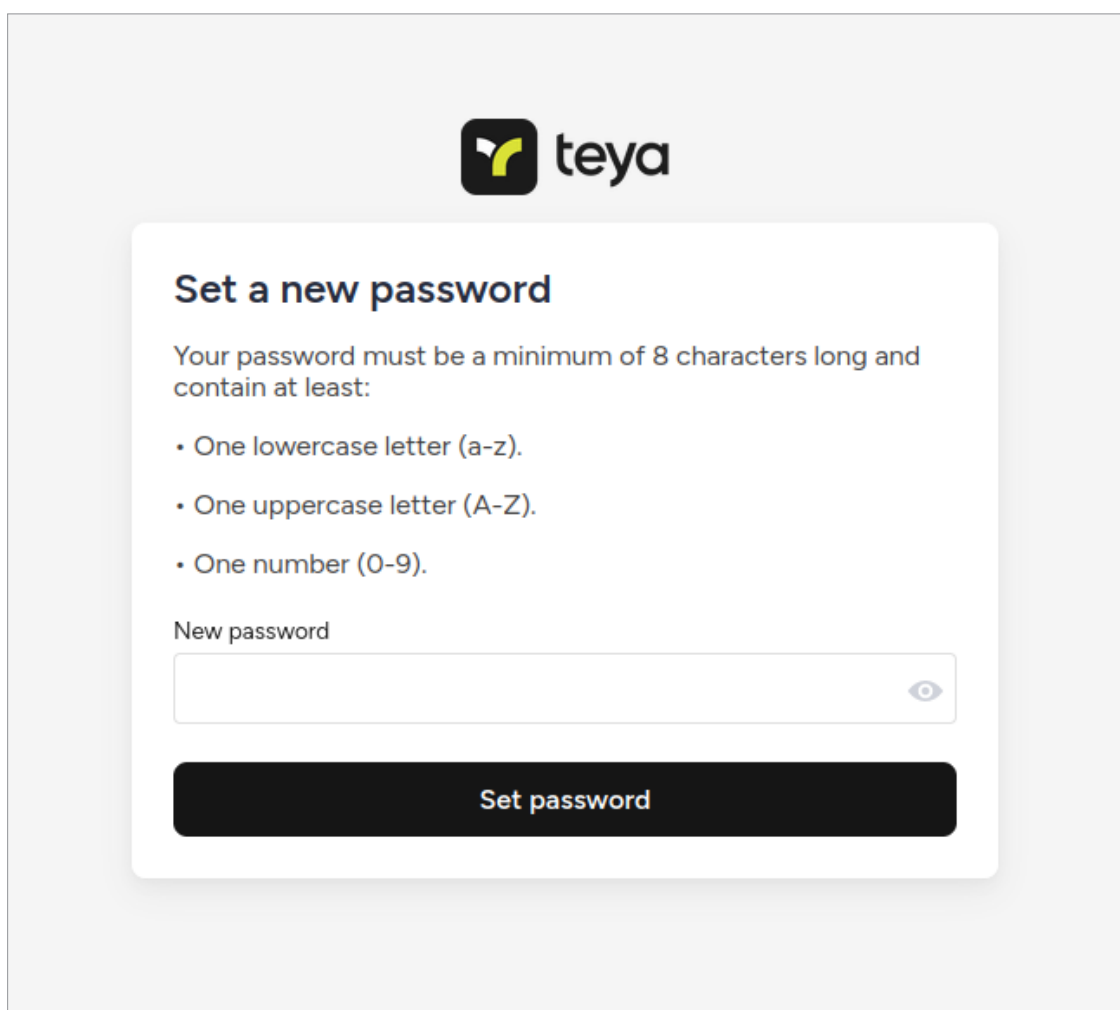
If you didn't request this password reset, please delete this email.

We're here to help. If you have any questions or need more information, please reach out to us via our [Help centre](#).

Warm regards,  
Team Teya

You will be directed to the “Set a new password” form. Type your new password into the field and click the ‘Set password’ button.

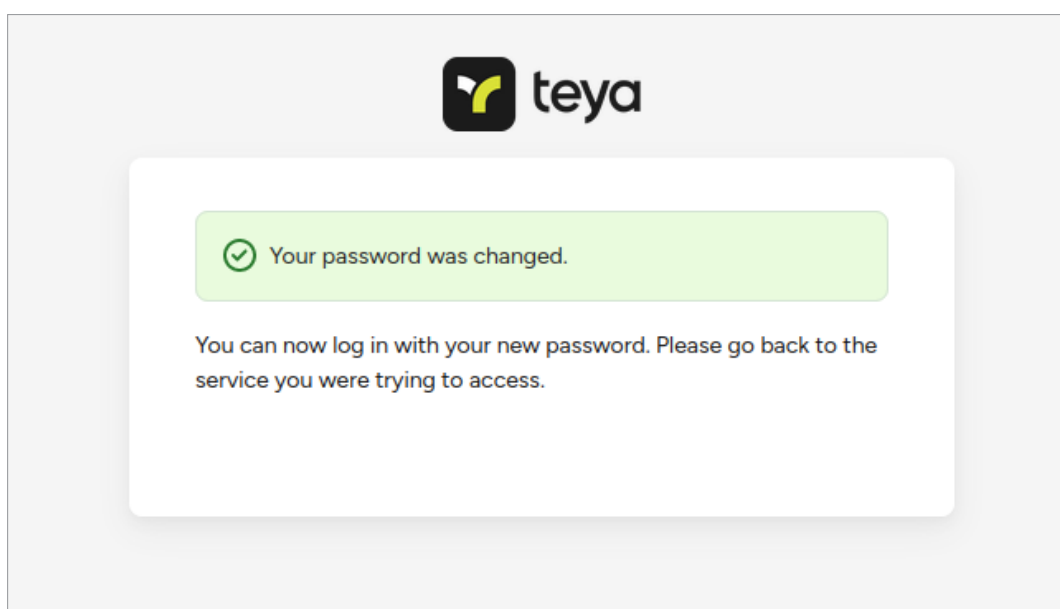
7



The screenshot shows a web interface for Teya. At the top center is the Teya logo, which consists of a black square with a yellow stylized 'Y' and the word 'teya' in lowercase. Below the logo is a white rectangular box with a shadow. Inside this box, the title 'Set a new password' is displayed in a bold, dark blue font. Below the title, a message states: 'Your password must be a minimum of 8 characters long and contain at least:'. This is followed by a bulleted list of requirements: '• One lowercase letter (a-z).', '• One uppercase letter (A-Z).', and '• One number (0-9)'. Below the list is a text input field labeled 'New password' on the left. The input field is white with a light gray border and a small eye icon on the right side. Below the input field is a black button with the text 'Set password' in white.

You will see the confirmation message of the resetting password.

8



The screenshot shows the same Teya logo at the top. Below it is a white rectangular box with a shadow. Inside this box, there is a green rounded rectangle containing a green checkmark icon and the text 'Your password was changed.'. Below this green box, a message states: 'You can now log in with your new password. Please go back to the service you were trying to access.'

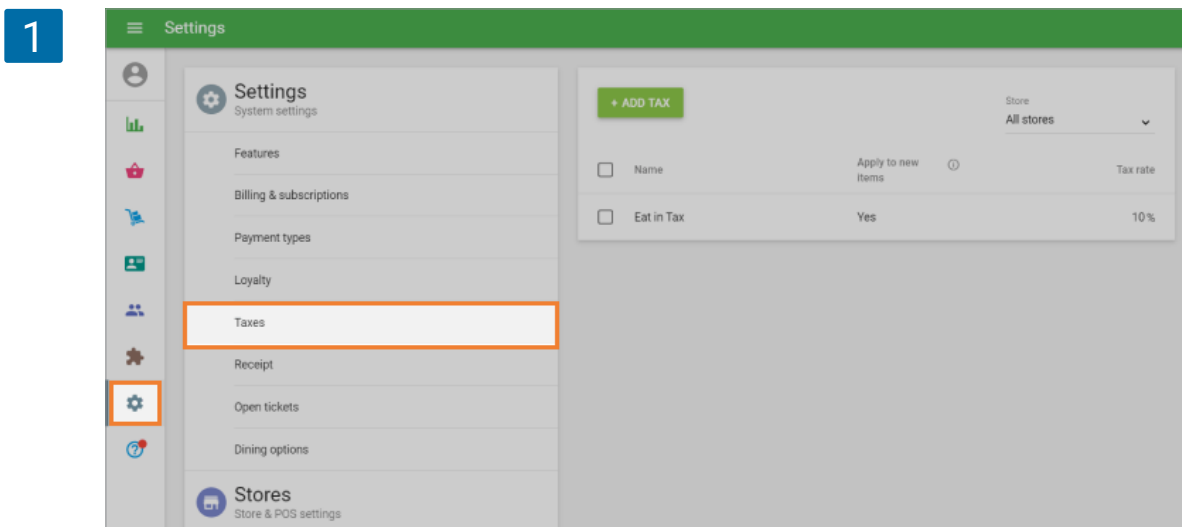
Now you can log in with the new password to the Back office.

## 8.10 How to Apply Taxes Depending on the Dining Options

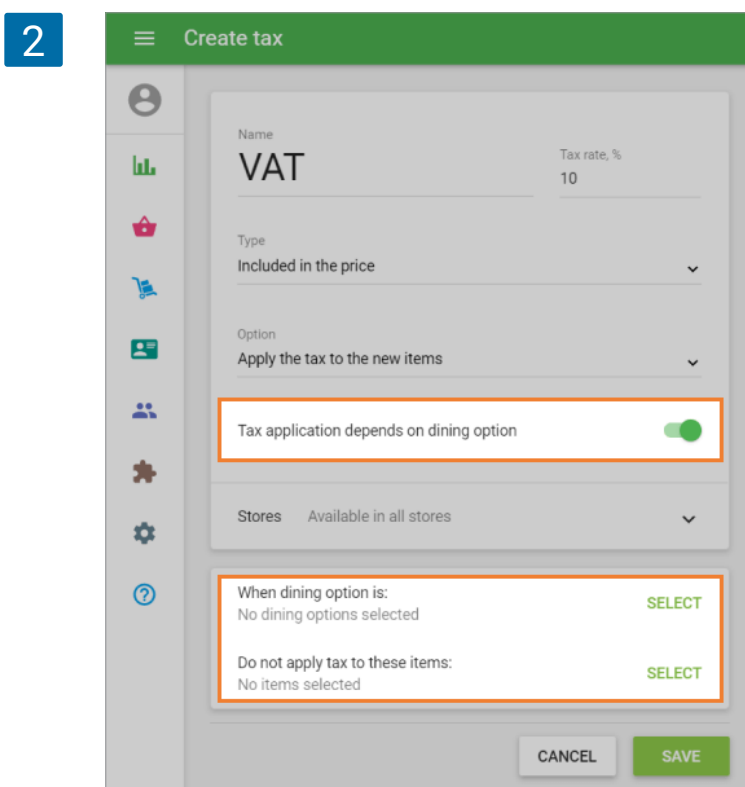
In some countries, the tax on certain goods depends on the dining options. For example, if the customer orders food for takeout, it is not taxed. But in the case of consuming the same food inside the cafe, it is taxed.

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.

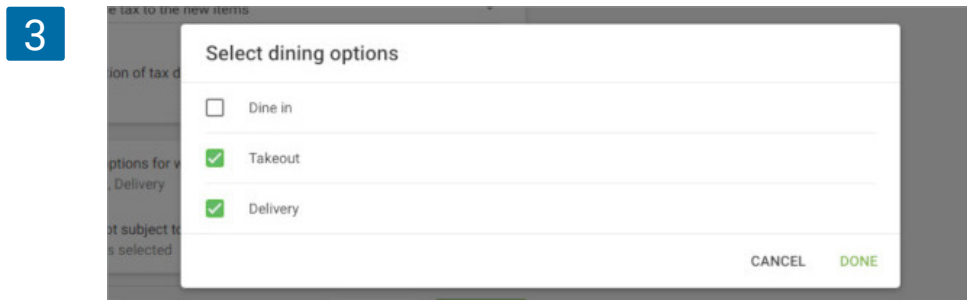


Switch on the 'Tax application depends on dining option'.



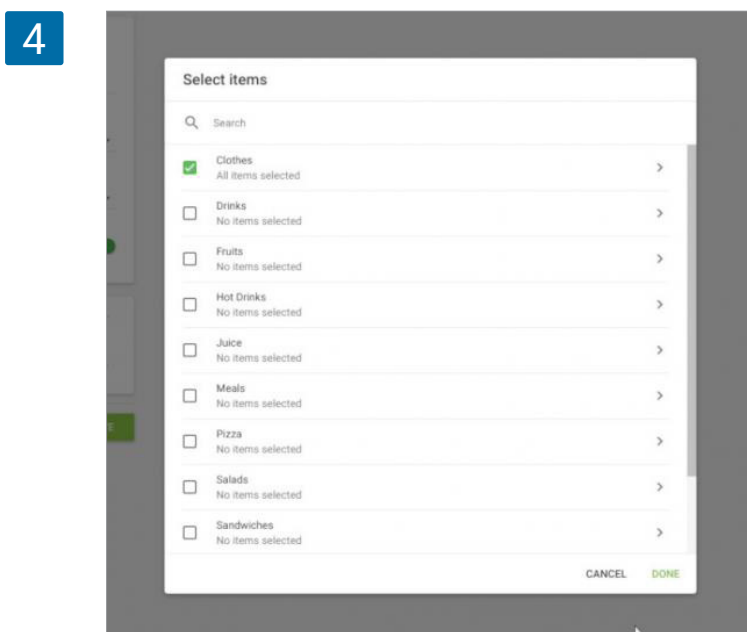
Click on the 'Select' button to choose the **dining option for which an exemption of the tax applies**.

For example, if you want your tax to apply only for 'Dine in', select all other options: 'Takeout' and 'Delivery'.



Don't forget to save your settings by clicking 'Done'.

Click on the 'Select' button to choose **items not subject to tax**.



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

The screenshot shows the 'Create tax' interface for a tax named 'VAT'. The tax rate is set to 10%. The type is 'Included in the price'. The option is 'Apply the tax to the new items'. The tax application depends on the dining option, which is currently turned on. The stores are set to 'Available in all stores'. At the bottom, there are two sections for exceptions: 'When dining option is: Delivery or Takeout' and 'Do not apply tax to these items: 3 Items', both with 'EDIT' links. At the very bottom are 'CANCEL' and 'SAVE' buttons.

If you have several stores, you can select the availability of the tax for each store.

6

The screenshot shows the 'Create tax' interface for a tax named 'Eat in Tax'. The tax rate is set to 10%. The type is 'Included in the price'. The option is 'Apply the tax to the new items'. The tax application depends on the dining option, which is currently turned on. The stores section is expanded, showing a list of stores with checkboxes: 'Available in all stores', 'Coffee shop', and 'Shop 2', all of which are checked. At the bottom right of the stores list is a 'SHOW LESS' link.

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.

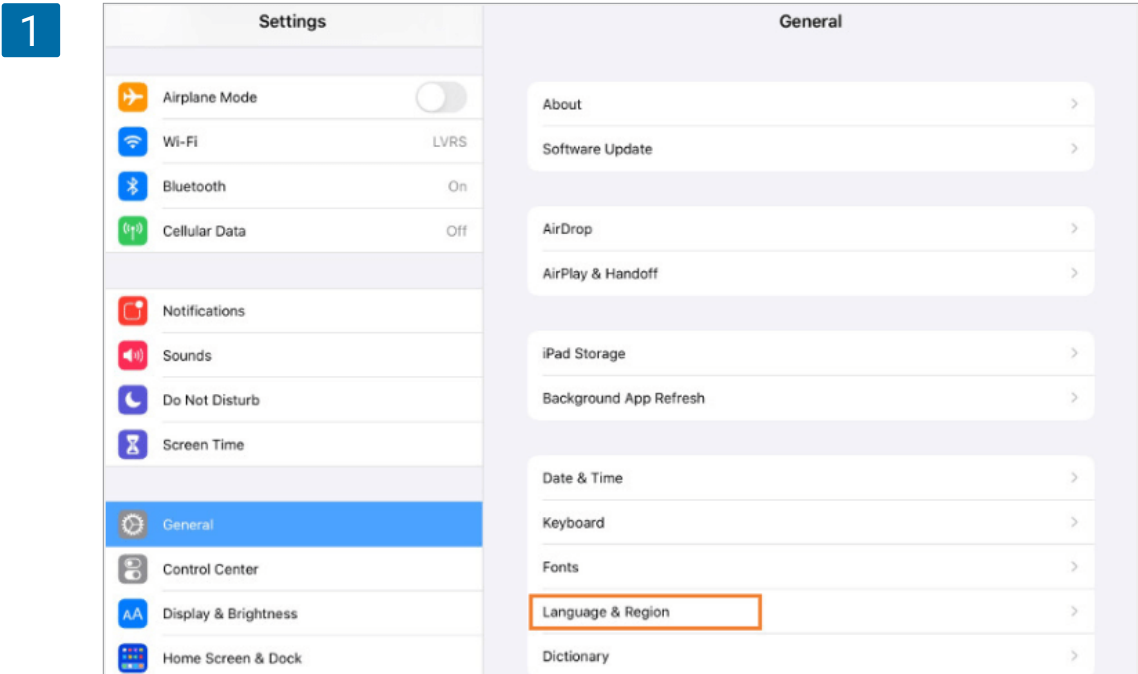


# 8.11 How to Change Language

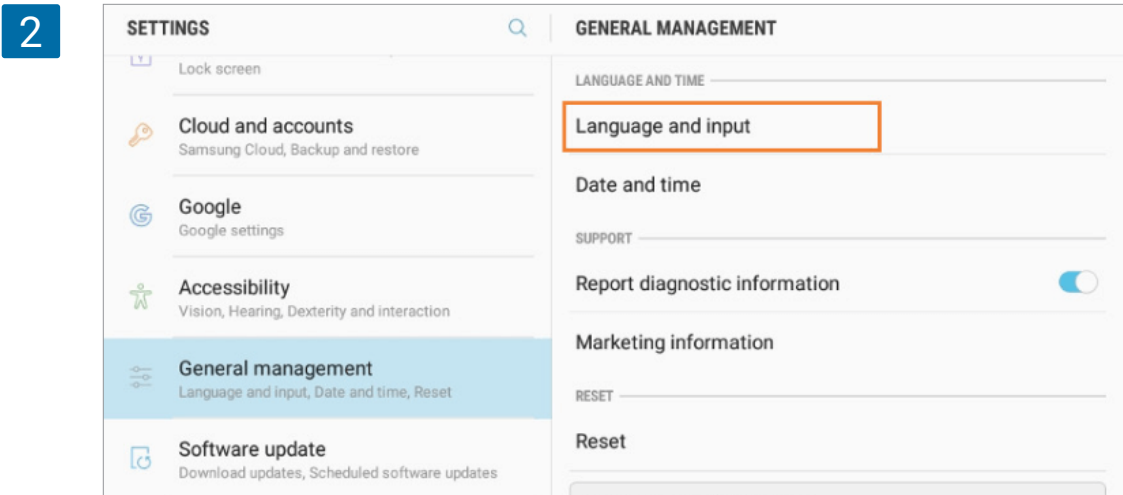
## 8.11.1 Changing Language in Loyverse POS app

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.

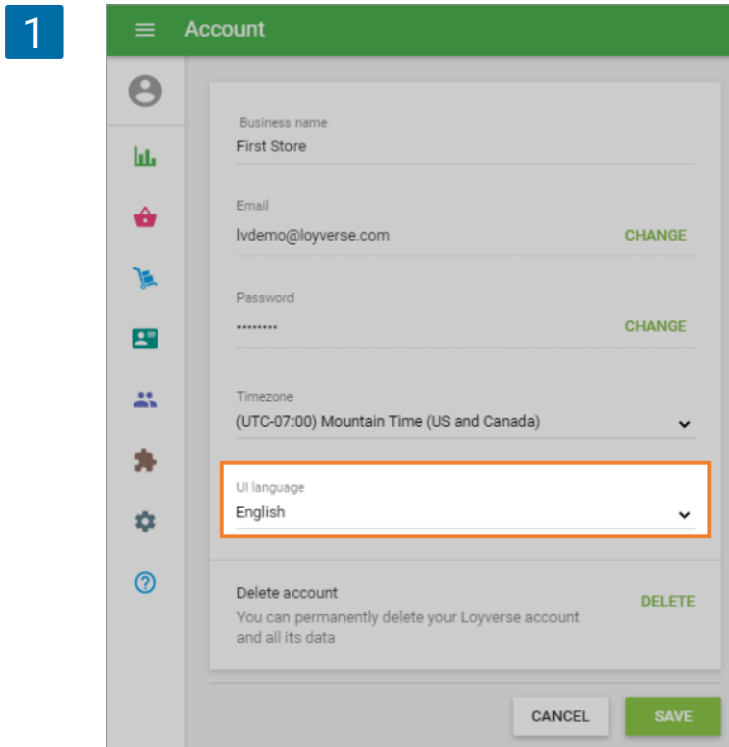


For Android devices, open Settings, and go to the 'General management' or 'System' section. Open the 'Language and input' menu to change the language.



## 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, Portuguese, Polish, Romanian, Italian, Indonesian, Japanese, Korean, Chinese, and others.

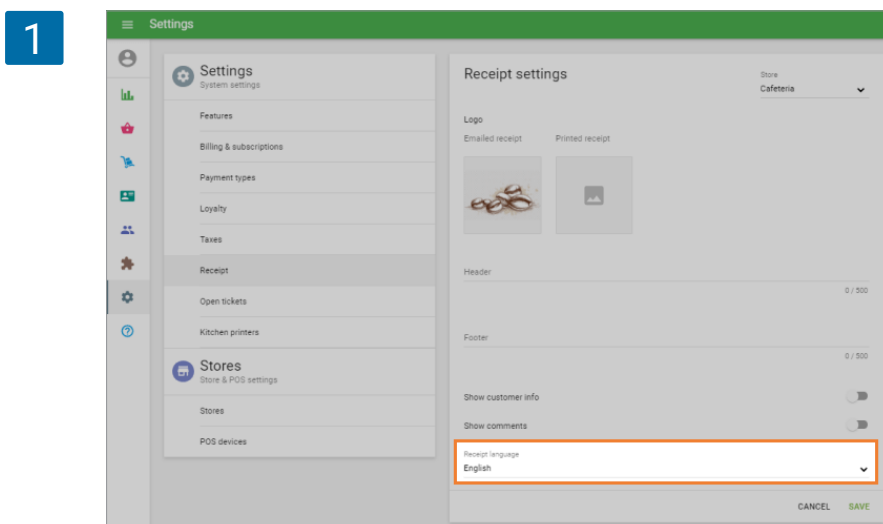


### Note

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.



## 8.12 How to Use Add-on Services of Loyverse POS

1. [Trial period](#)
2. [Subscription to Employee management](#)
3. Subscription for Advanced inventory
4. Subscription for Integrations
5. Adding payment method
6. Payments for subscriptions
7. Unsubscribing

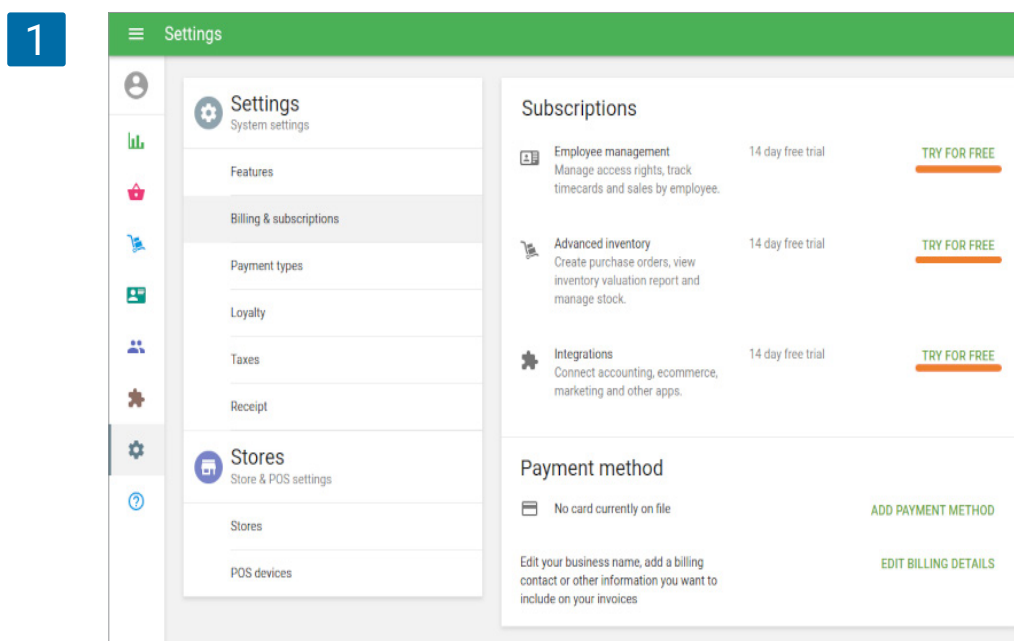
Add-on services of Loyverse POS includes subscriptions to Employee management, Advanced inventory and Integrations.

### 8.12.1 Trial period

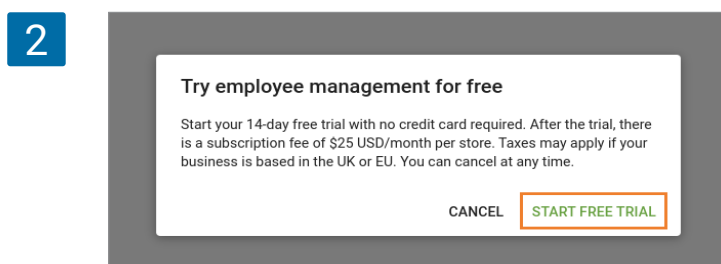
All add-on services have a 14-day free trial period. Starting a trial period does not require a card.

To start a trial, login to the Back Office, click on the 'Billing & subscriptions' button from the Settings menu.

Click on the 'Try for free' buttons to start a 14-day free trial period for Employee management, Advanced inventory or Integrations.

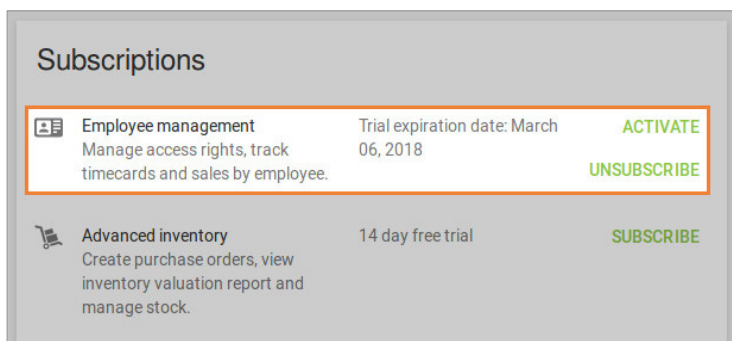


For **Employee management trial**, you will be asked to add employees in the Employees list. When adding an employee, a pop-up window with terms and conditions will appear on your screen. Click on the 'Start free trial' button.



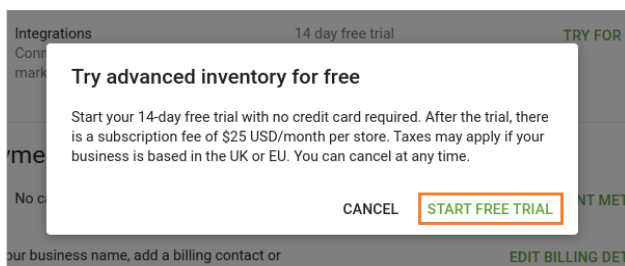
You will see the information about the trial expiration date. If you want to continue using the service, after finishing the trial, activate the subscription by clicking on the 'Activate' button. At any time, you can cancel the trial with the 'Unsubscribe' button.

3



Likewise, for Advanced inventory trial, a pop-up window with terms and conditions will appear on your screen. Click on the 'Start free trial' button.

4



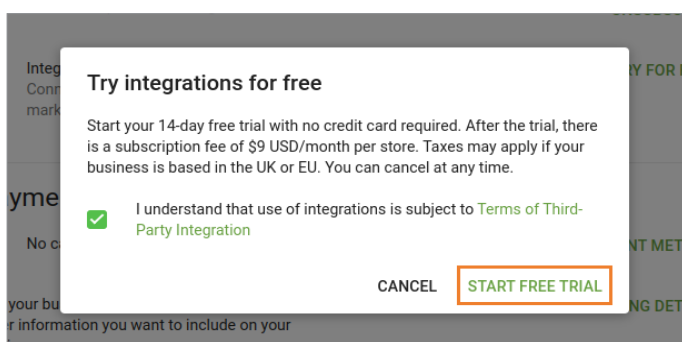
You will see the information about the trial expiration date. If you want to continue using the service, after finishing the trial, activate the subscription by clicking on the 'Activate' button. At any time, you can cancel the trial with the 'Unsubscribe' button.

5



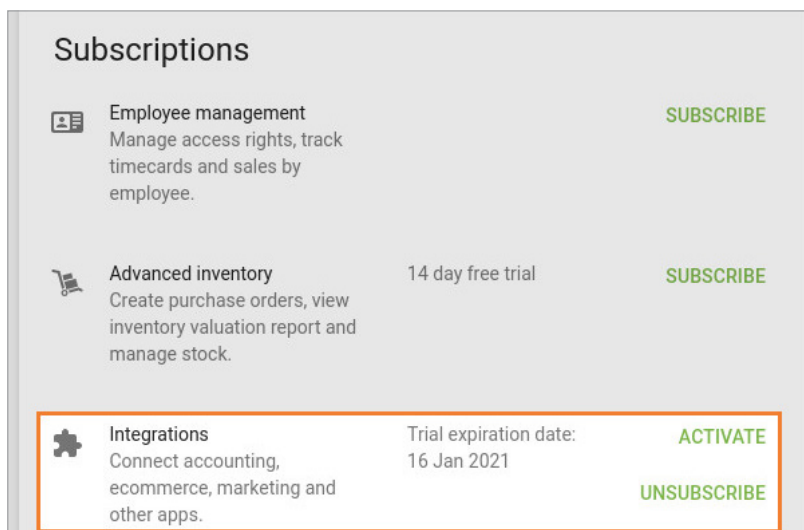
Likewise, for the Integrations trial, a pop-up window with terms and conditions will appear on your screen. Read the Terms of Third-Party Integration, and agree with them by selecting the check box. Click on the 'Start free trial' button.

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.

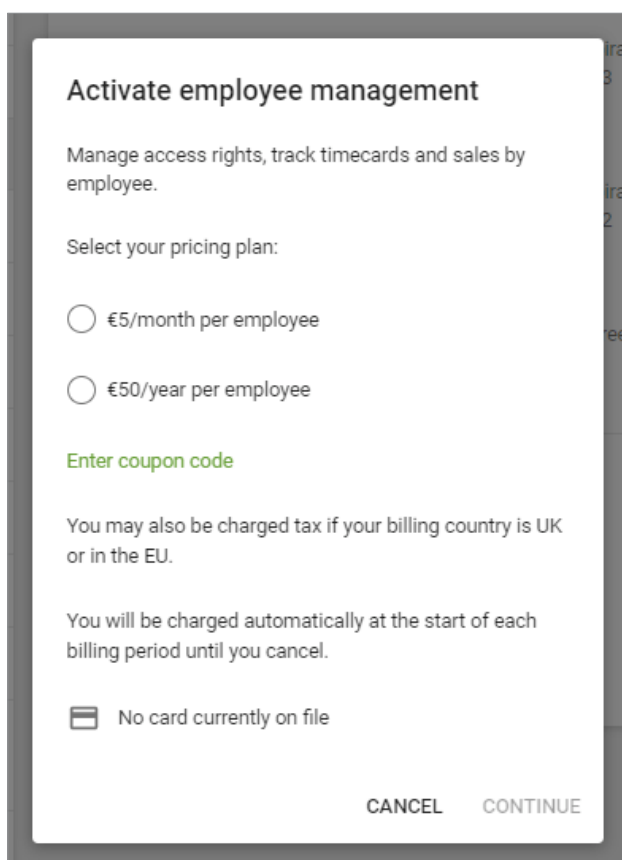
7



## 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.

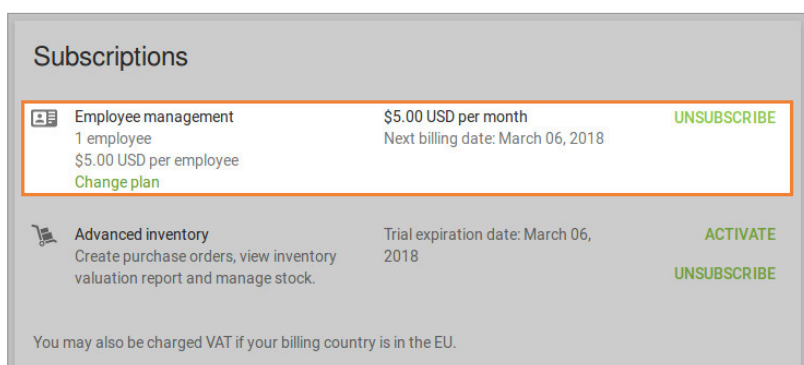
1



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

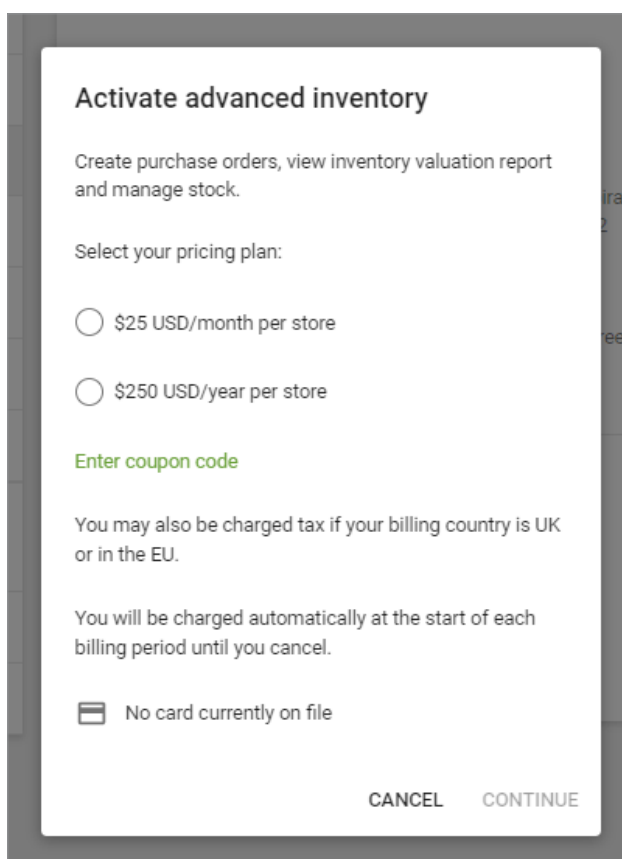


### 8.12.3 Subscription for Advanced inventory

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

**Subscriptions**

 <b>Advanced inventory</b> 1 store \$25.00 USD per store <a href="#">Change plan</a>	\$25.00 USD per month Next billing date: March 20, 2018	<a href="#">UNSUBSCRIBE</a>
--	--	-----------------------------


You may also be charged VAT if your billing country is in the EU.

**Payment method**


**MASTERCARD 7711**
[UPDATE PAYMENT METHOD](#)

Edit your business name, add a billing contact or other information you want to include on your invoices
 [EDIT BILLING DETAILS](#)

**Invoices**

Date	Service	Amount
February 20, 2018	Advanced inventory (1)	\$25.00 USD 

## 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

**Subscriptions**

**Activate integrations**

Connect accounting, ecommerce, marketing and other apps.

Select your pricing plan:


☐ \$9 USD/month per store  
☐ \$90 USD/year per store

[Enter coupon code](#)

Third-party app developers may charge additional fees.

You may also be charged tax if your billing country is UK or in the EU.

You will be charged automatically at the start of each billing period until you cancel.

 No card currently on file

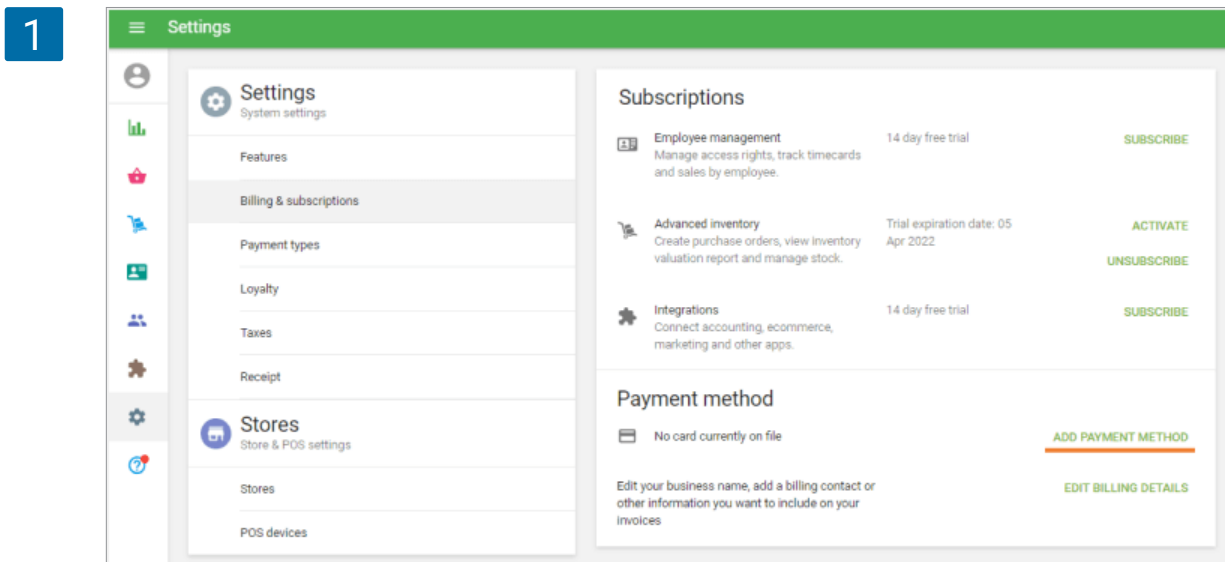
[CANCEL](#)
[CONTINUE](#)

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.



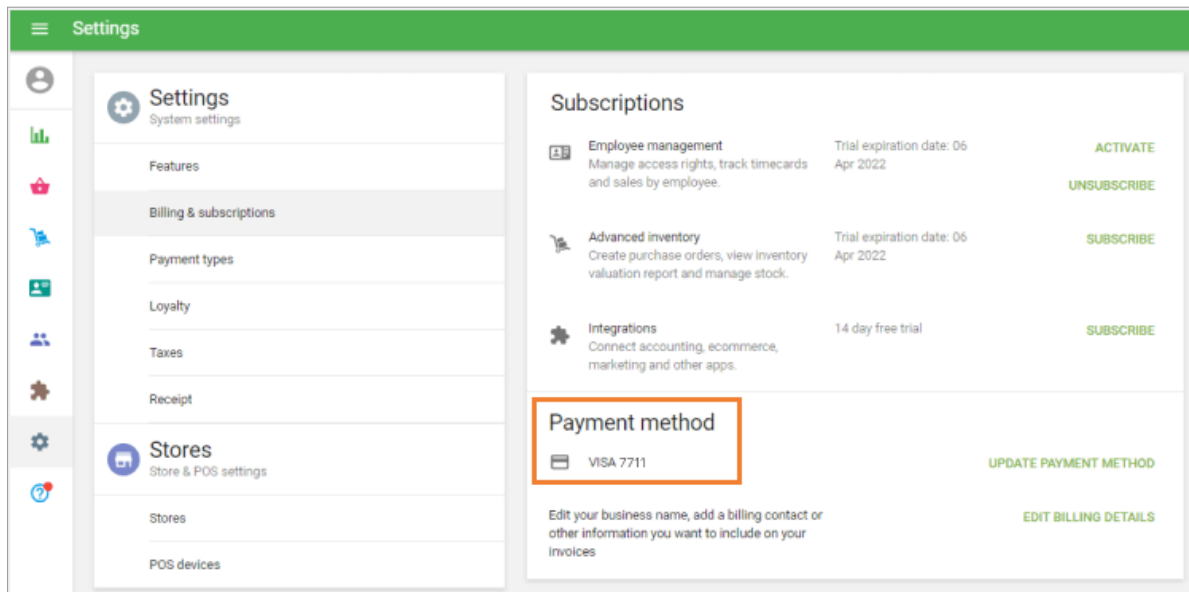
Fill in all fields and click on the 'Save' button. All information will be verified. If any information is missing or incorrect, a pop-up message will notify you what needs to be corrected.

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

Invoices			
Date	Service	Amount	
Dec 1, 2017	Employee management (5)	\$25.00	
Nov 1, 2017	Employee management (5)	\$25.00	

### Note

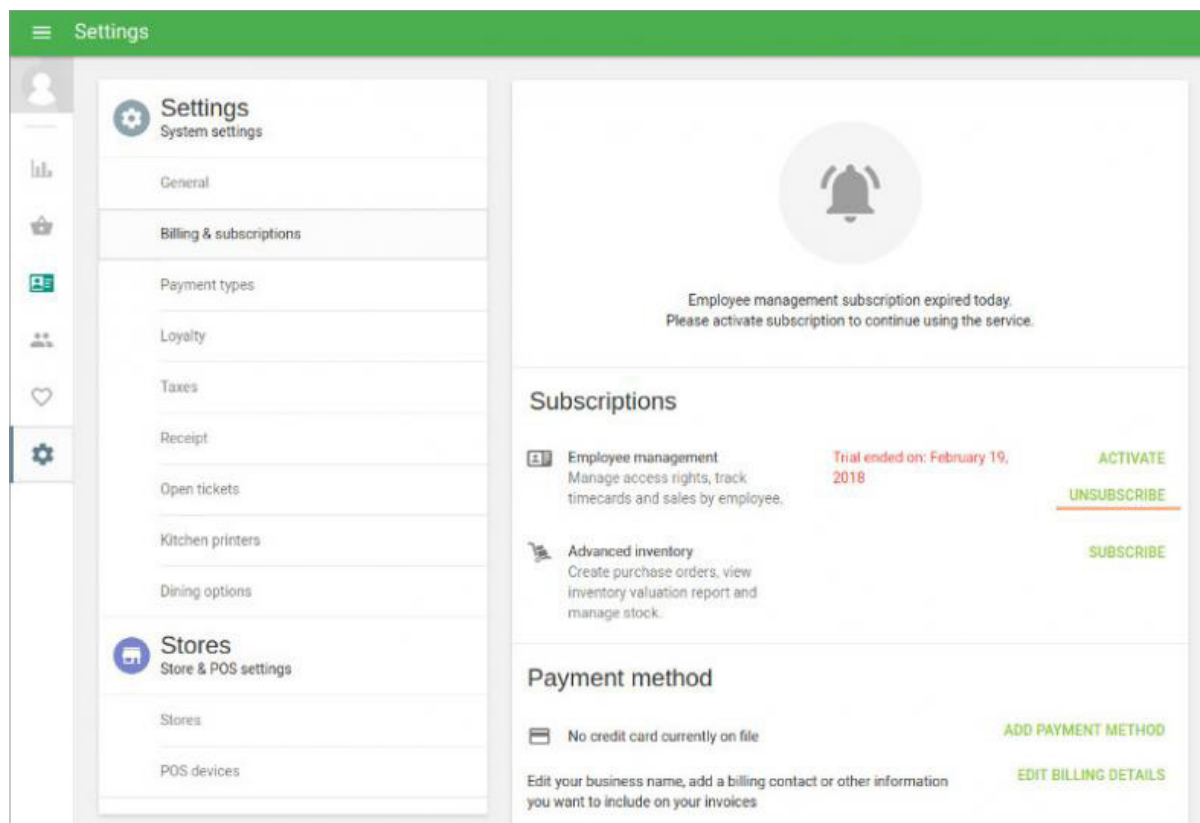
You may also be charged VAT if your billing country is UK or in the EU. You can cancel your Employee management subscription at any time by deleting extra employees in the 'Employee list' section. However, please note that the paid amount is non-refundable and non-transferable. Therefore, if you delete 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'.

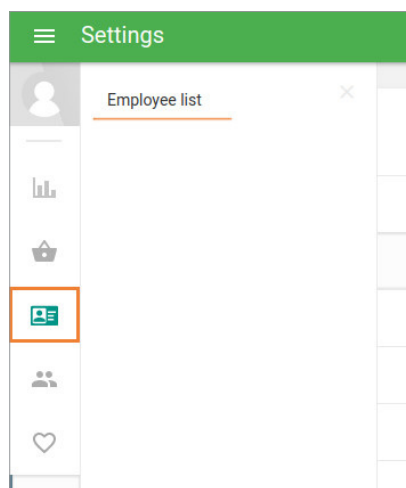
If you click 'Unsubscribe' from the **Employee management**, all your employees will be deleted from the Employees list except for the owner, and you can continue using the Back Office.

1

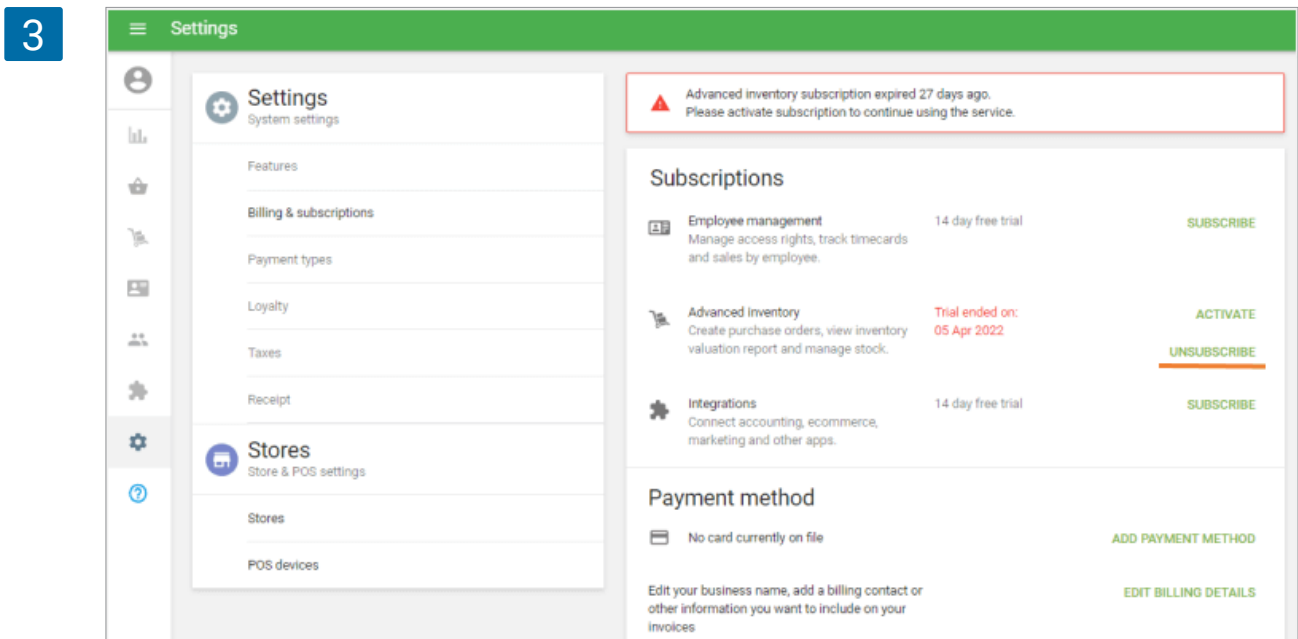


Or you can delete some employees by yourself by going to the 'Employee list' section in the Employees menu and pay for the remaining number of employees.

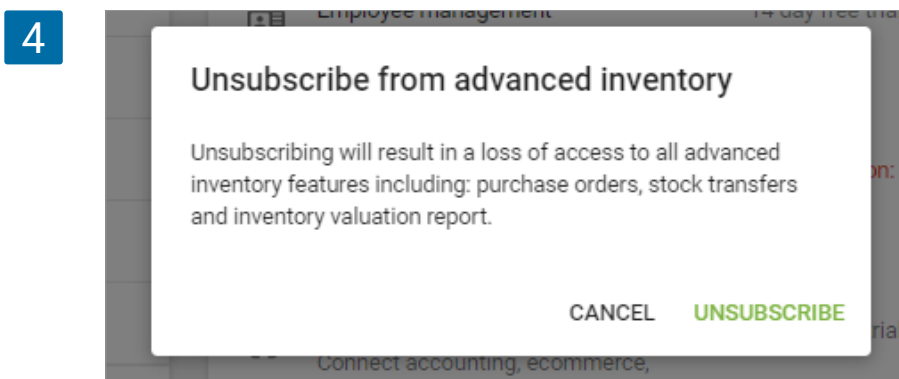
2



If you click 'Unsubscribe' from Advanced inventory, you will see the warning message about the loss of access to the Advanced inventory features.



Click on the 'Unsubscribe' button to continue.



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:

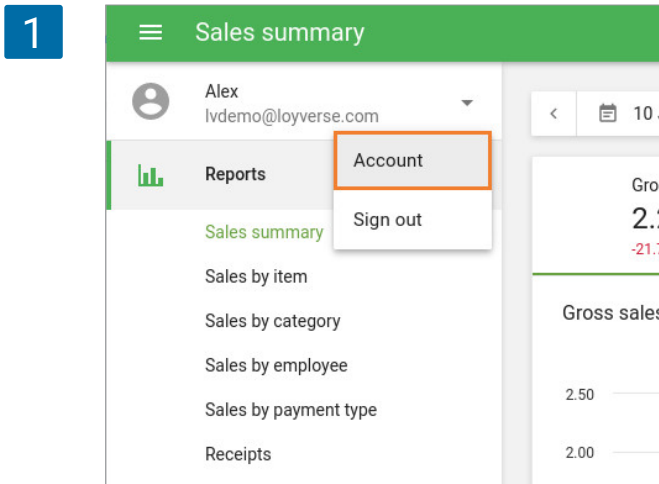
- changing the pricing plan to a lower one in the middle of the billing cycle
- reducing the number of employees and/or stores in the middle of the billing cycle
- unsubscribing in the middle of the billing cycle

You can use the money from your credit account for the paid services of Loyverse POS.

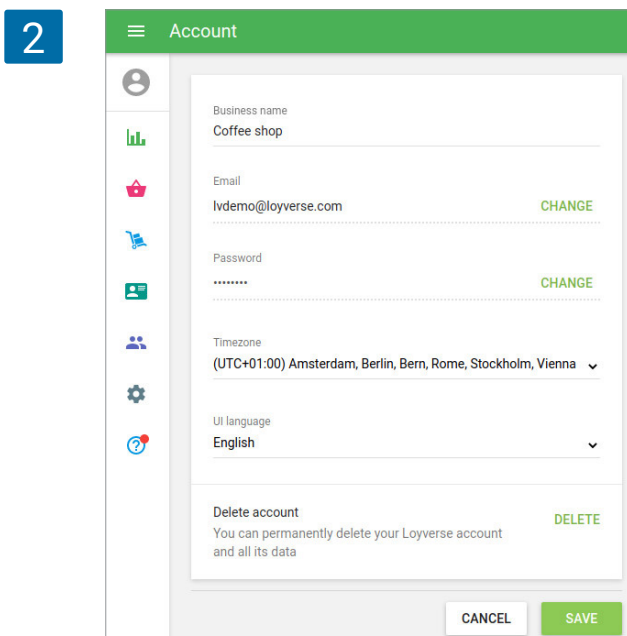
## 8.13 How to Manage Account Settings in the Back Office

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.



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.



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.

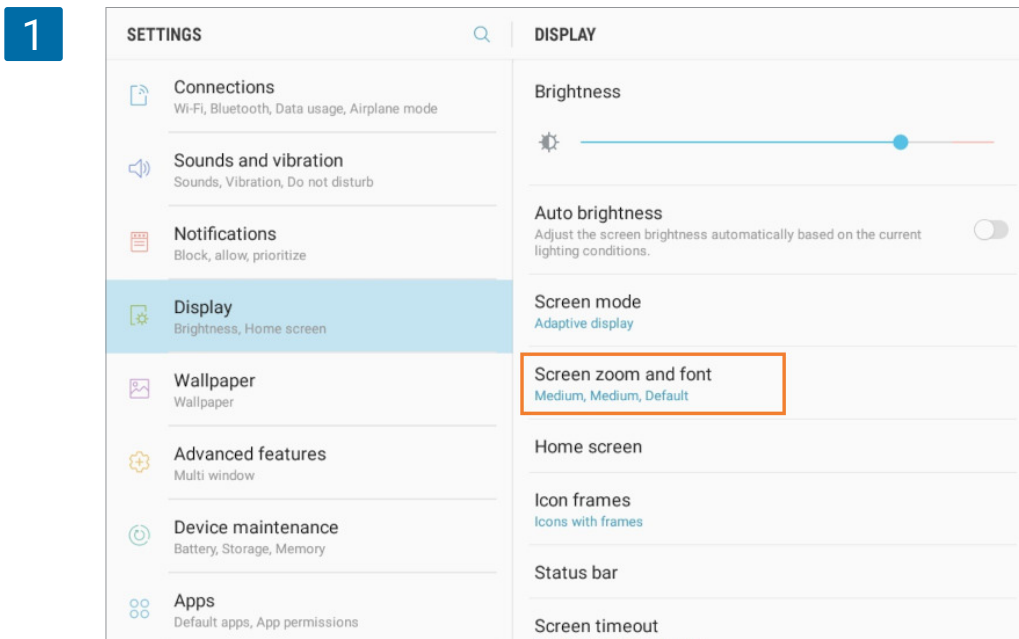
## 8.14 How to Increase the Font Size on Android Devices

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.

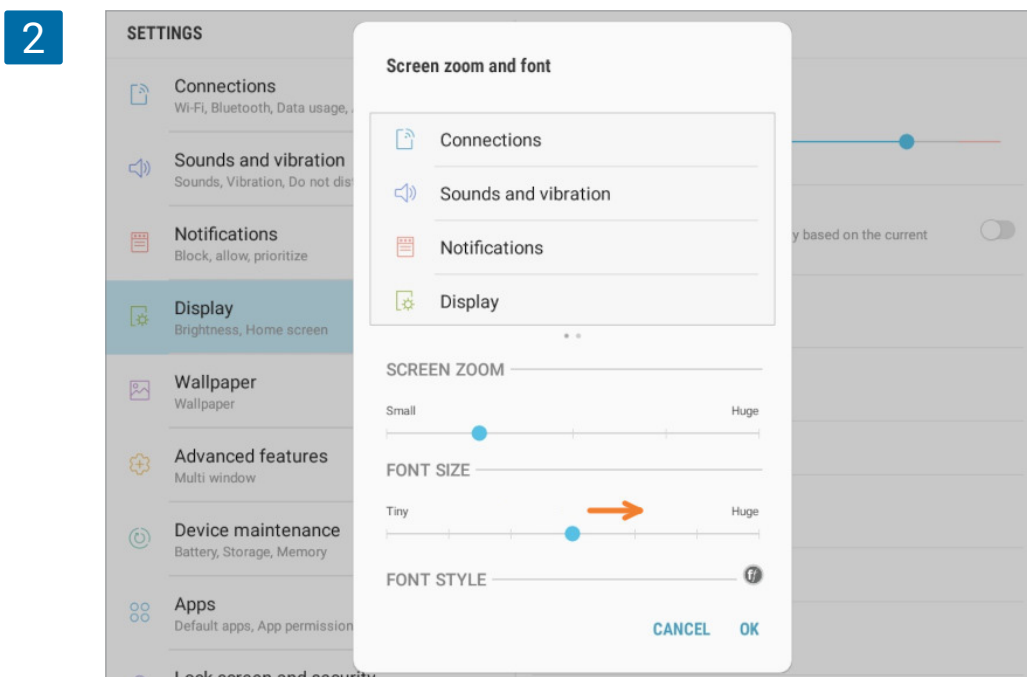
### Note

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.



Change the font size of your device.




After saving the device settings, the font size of the text in the Loyverse POS app will change.


3

Before


All items




Apple




Apple Juice




Banana




Banana cake




Beef and Chicken Sat...




Berry cake




Black Tea




Caesar Salad




Cake




Cake with strawberry




Capuccino




Carrot Fresh




Cashew nuts




Cheese




Cheesecake




Cherry cake




Chicken burger



Chocolate Eclair Dessert



Chocolate sausage



Chocolate truffle dessert

FRUITS

SWEETS

COFFEE & TEA

BREAKFAST

Ticket

Dine in

Cake with strawberry x 1

14.00

Cashew nuts x 3.000

45.00

Beef and Chicken Sa... x 1

12.03

Tax

6.22

Total


77.25

SAVE


CHARGE

After


All items




Apple




Apple Juice




Banana




Banana cake




Beef and Chicken Sat...




Berry cake




Black Tea




Caesar Salad




Cake




Cake with strawberry




Capuccino




Carrot Fresh




Cashew nuts




Cheese




Cheesecake




Cherry cake




Chicken burger



Chocolate Eclair Dessert



Chocolate sausage



Chocolate truffle dessert

FRUITS

SWEETS

COFFEE & TEA

BREAKFAST

Ticket

Dine in

Cake with strawbe... x 1

14.00

Cashew nuts x 3.000

45.00

Beef and Chicken... x 1

12.03

Tax

6.22

Total

77.25

SAVE

CHARGE

Note

Deleting the account will unsubscribe from all paid services and email newsletters.

274

8.14 How to Increase the Font Size on Android Devices



To have a bigger font size of the items' names, choose the list option in the application settings 'Home screen item layout'.

4

All items

Apple Juice

5.50

Banana

1 variant

Banana cake

4.00

Beef and Chicken Satay

6.20

Berry cake

6.50

Black Tea

1.20

Caesar Salad

4.40

Cake

6.00

Cake

-

Cake with strawberry

7.70

Capuccino

4.00

PAGE 1

Ticket

Delivery

OPEN TICKETS

CHARGE

## 8.15 How to Delete Loyverse Account

Deleting a Loyverse account is available only for the account owner.

### 8.15.1 Deleting account at Loyverse POS app

To delete the Loyverse account at POS installed on an Android or iOS device go to the 'Support' section.

1

Andy

POS 22

Coffee Shop #3

Sales

Receipts

Shift

Items

Settings

Back office

Apps

Support

Banana cake

Beef and Chicken Satay

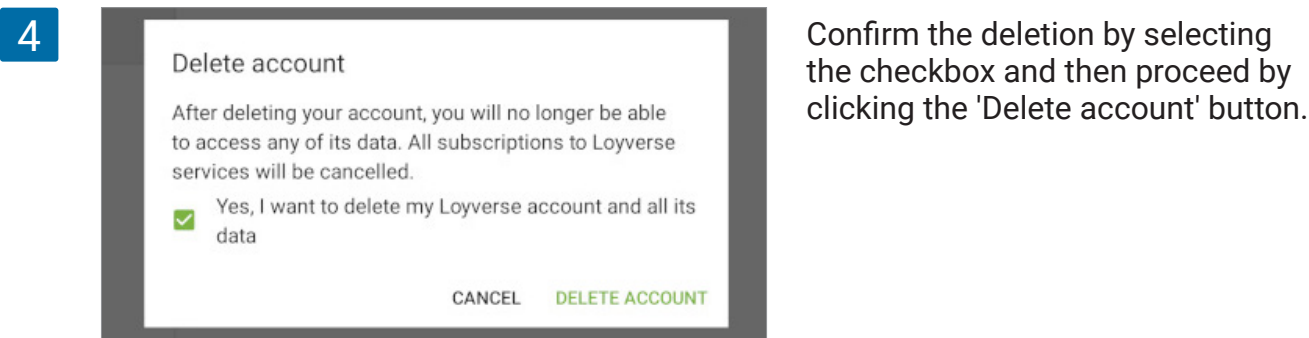
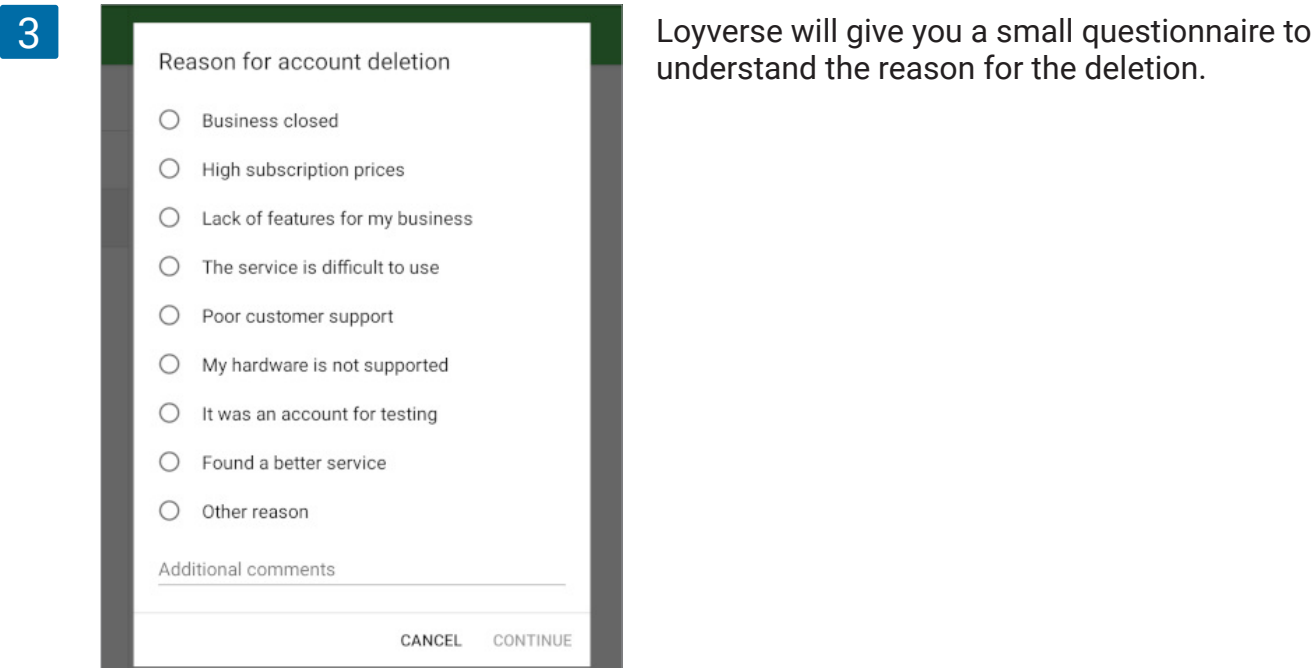
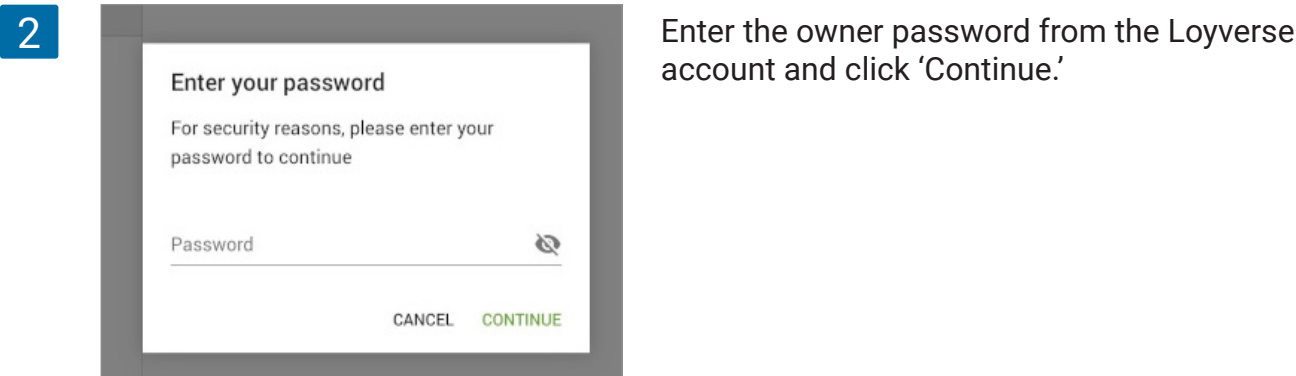
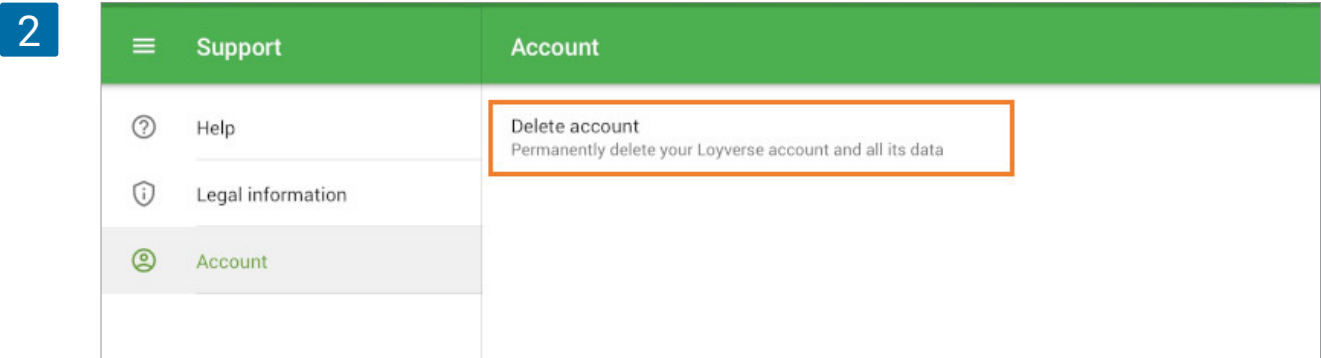
Cake

Cake with strawberry

Shew nuts

Cheese

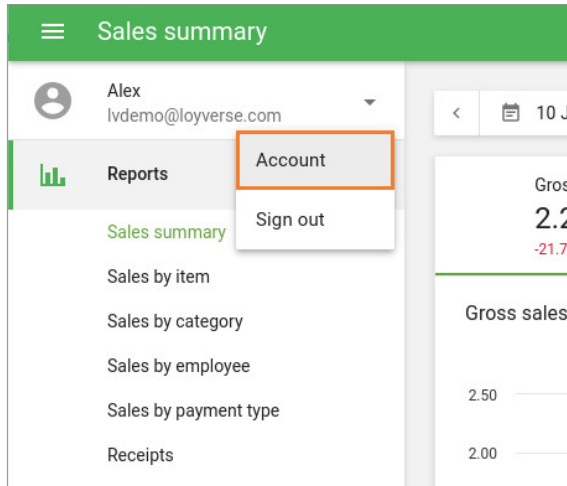
Select 'Account' and tap on the 'Delete account' line.





## 8.15.2 Deleting account at the Back office

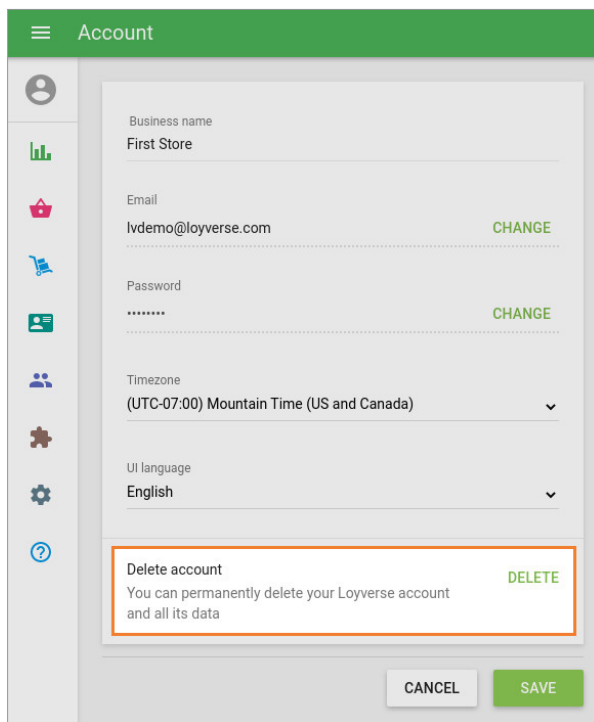
1



The owner can also delete the Loyverse account at the Back Office in account settings.

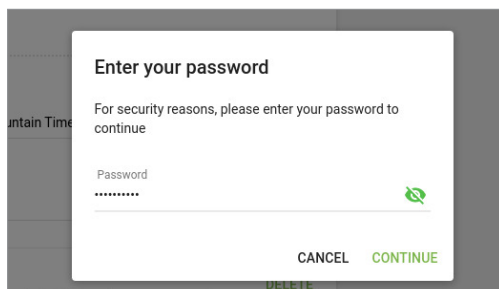
To access the account settings, click the 'Account' button in the Back Office's main menu.

2



Click on the 'Delete' button in the 'Delete account' row.

2



Follow the steps for deleting the account: enter the owner's password from the account, select the reason for deletion, and confirm deleting the account.

### Note

Deleting the account will permanently remove all your sales data, account settings, and all entities, such as items, discounts, taxes, customers, etc. If you want to keep this information, [export your data](#) before deleting your account.

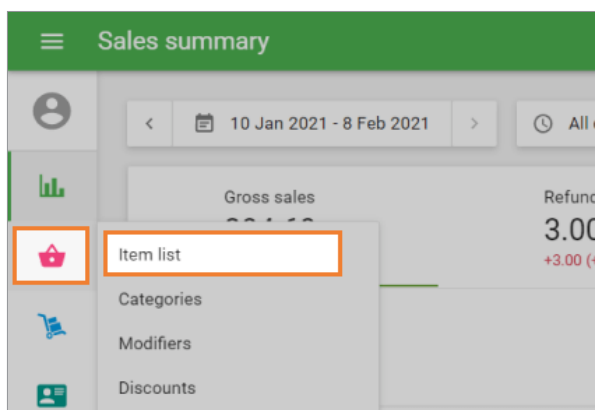
Deleting the account will also cause you to unsubscribe from all paid services and email newsletters.

## 8.16 How to Export Data from Loyverse Account

You can export data in CSV format from the Loyverse account at the [Back office](#). There are such data to export: items, customers, receipts, and reports. If you use Advance Inventory, there are also reports to download as CSV and various documents that you can download one by one as PDF or CSV files.

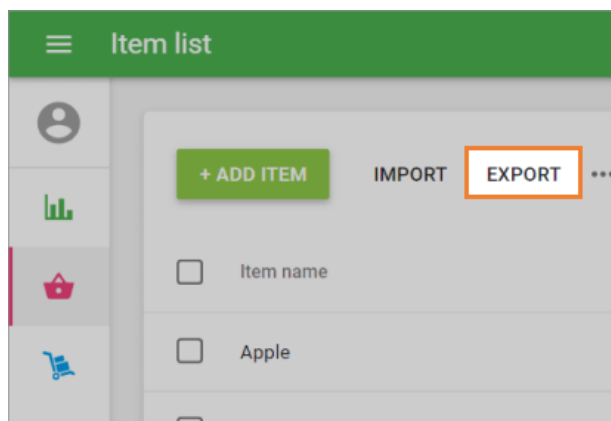
### 8.16.1 Exporting Items List

1



Go to the 'Item list' at the Back Office.

2



Click on the 'Export' button.

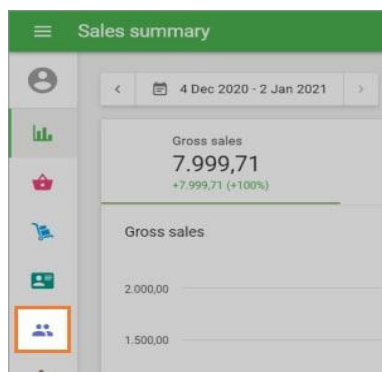
The system will download the CSV file with all items to your device.

#### Note

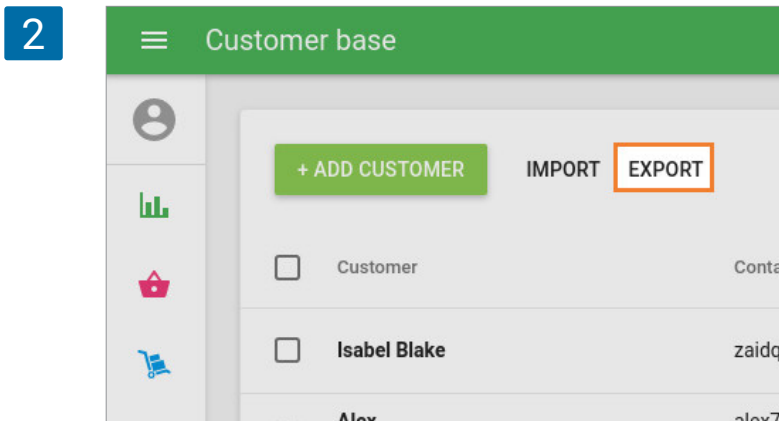
There are no images in the exported file and no possibility to export them

### 8.16.2 Exporting Customers List

1



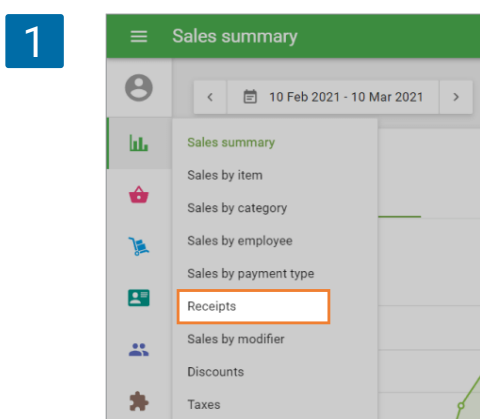
Go to the 'Customers' menu at the Back Office.



Click on the 'Export' button

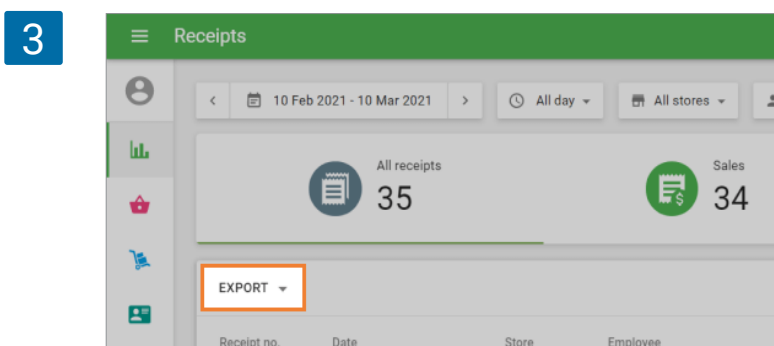
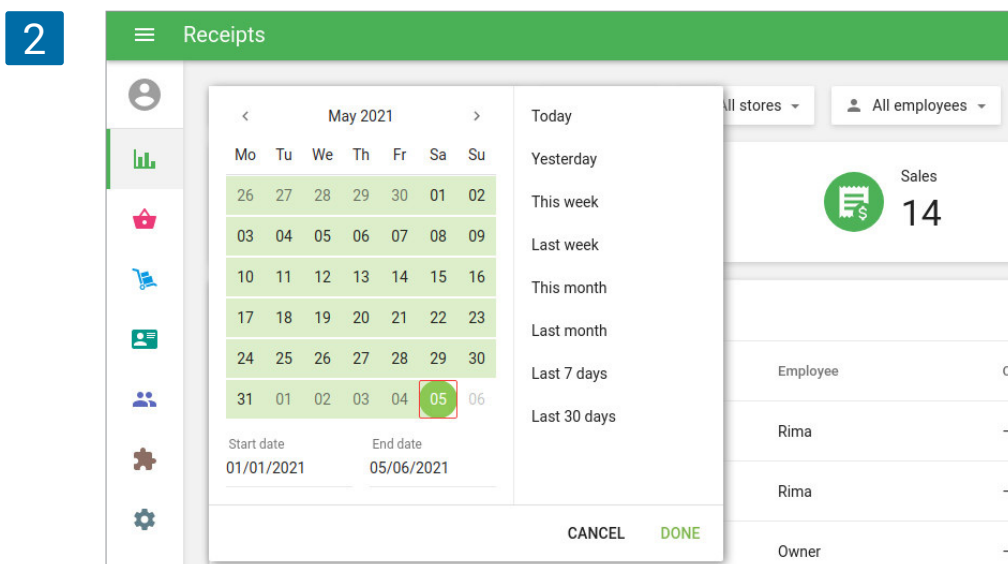
The system will download the CSV file with all customers to your device.

### 8.16.3 Exporting Receipts List



Go to the 'Receipts' section in the 'Reports' menu at the Back Office.

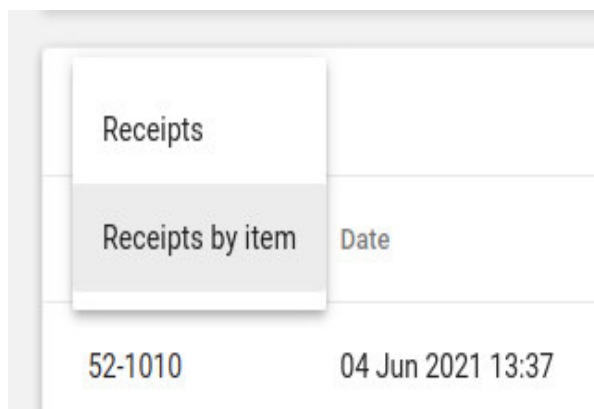
Select the period for which you wish to export receipts. If you want to export all receipts from your account, select the period from the first to the last day of your activity as well as 'All day', 'All stores', and 'All employees' in the filter settings.



Click on the 'Export' button

Select the exporting type: 'Receipts' or 'Receipts by item'. The 'Receipts by item' give a detailed view of each item at the ticket, such as price, discounts, and taxes applied to it.

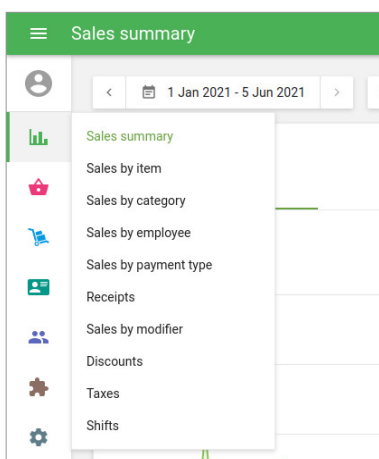
4



The CSV file with receipts will be downloaded to your device.

## 8.16.4 Exporting Reports

1

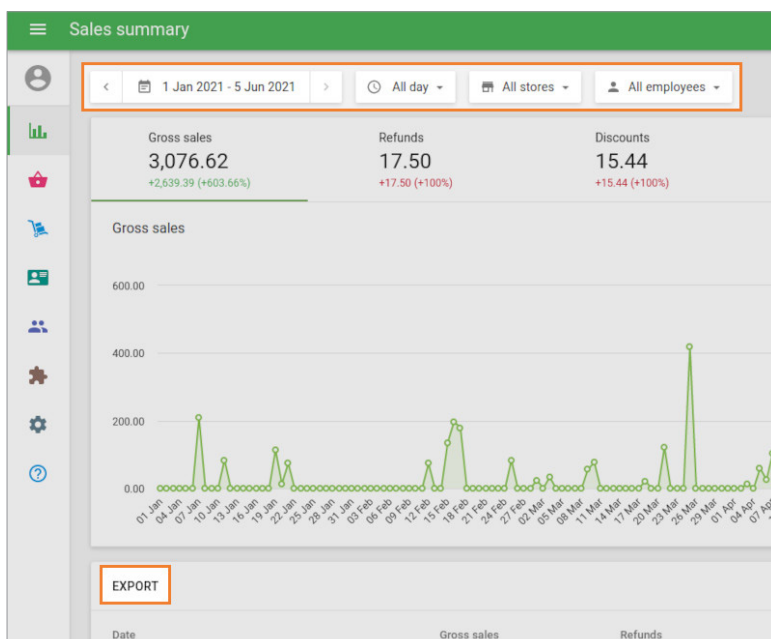


Each report at the Loyverse Back office has an export functionality. You can export reports: 'Sales summary', 'Sales by item', 'Sales by category', 'Sales by employee', 'Sales by payment type', 'Sales by modifier', 'Discounts', 'Taxes' and 'Shifts'.

Go to the needed section in the 'Reports' menu at the Back Office.

Select the period for which you wish to export the report. If you want to export the report for the whole period, select the period from the first to the last day of your activity in Loyverse, as well as 'All day', 'All stores', and 'All employees' in the filter settings. Click on the 'Export' button.

2



The system will download the CSV file with the report to your device.

## 8.16.5 Exporting Reports and Documents of the Advanced Inventory

If you use Advance Inventory, there are also Inventory history and Inventory valuation reports that you can download as CSV files by clicking on the 'Export' button.

1

Inventory history

7 May 2021 - 5 Jun 2021

All stores

All employees

EXPORT

Date	Item	Store	Employee
	Instant Coffee	Coffee shop	Owner
	Kit Salad	Coffee shop	Rima
	Cookies	Coffee shop	Rima
	Kit Salad	Coffee shop	Rima
	Cookies	Coffee shop	Rima
02 Jun 2021 12:05	Cherry cake	Coffee shop	Owner

If you use Advance Inventory, there are various documents, such as Purchase orders, Transfer orders, Stock adjustments, Inventory counts, Productions that you can download one by one as PDF or CSV files.

You have to open each document and click on the 'More' drop-down menu.

2

Purchase order details

Purchase orders

SEND MORE

PO1042

Closed (18 May 2021)

Received 4 of 4

Date: 18 May 2021  
Ordered by: Owner

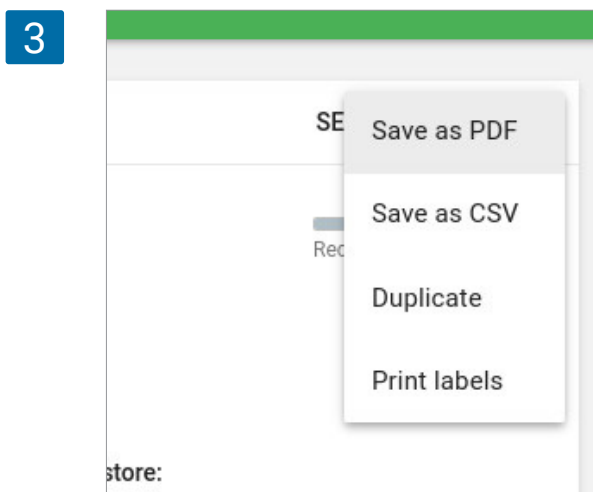
Supplier:  
Happy & Co  
John  
1122334455  
happyco@gmail.com

Destination store:  
Cafeteria

Items

Item	Quantity	Purchase cost	Amount
Acqua, scatola 0,5 litri, 25 p. SKU 10017	4	125.00	500.00
Total			500.00

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



#### Note

The best way to open your CSV file is in Google Sheets, but you can also use other tools, such as LibreOffice Calc or OpenOffice Calc and Excel.



# 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 / TSP654IIBI (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

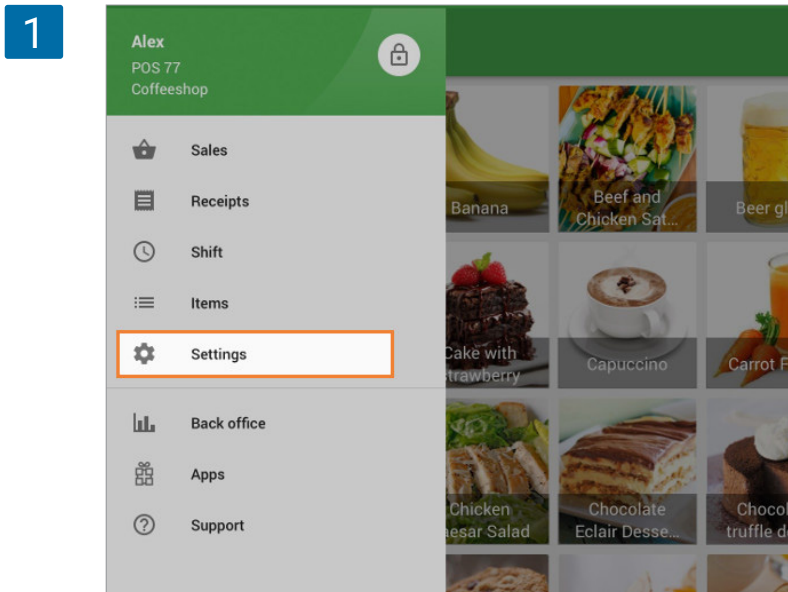
---

For an Ethernet printer to work with Loyverse POS (Android, iOS), you will need the following:

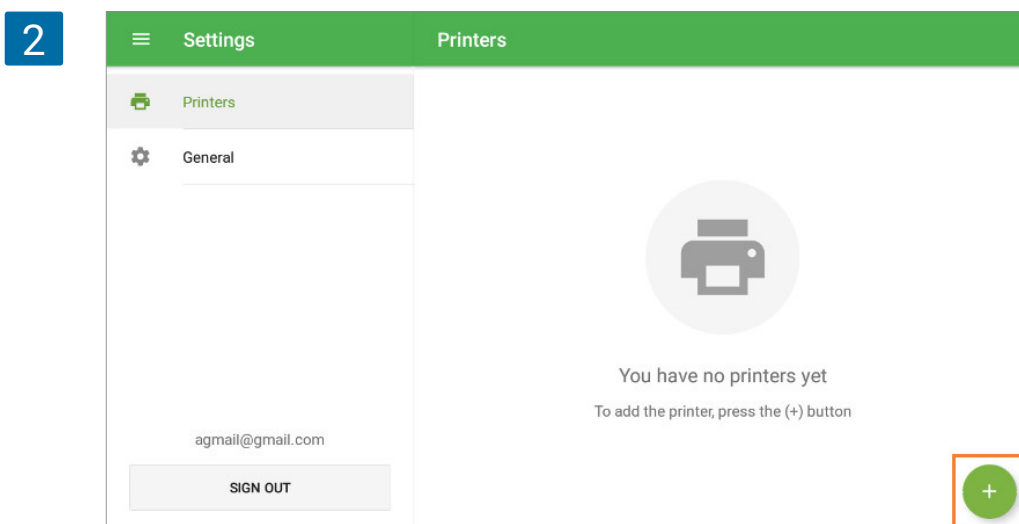
- Smartphone or tablet with the Loyverse POS app
- Ethernet printer, supported by the Loyverse POS app (see the list of Supported Printers)
- Wi-Fi router
- Ethernet cable

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.

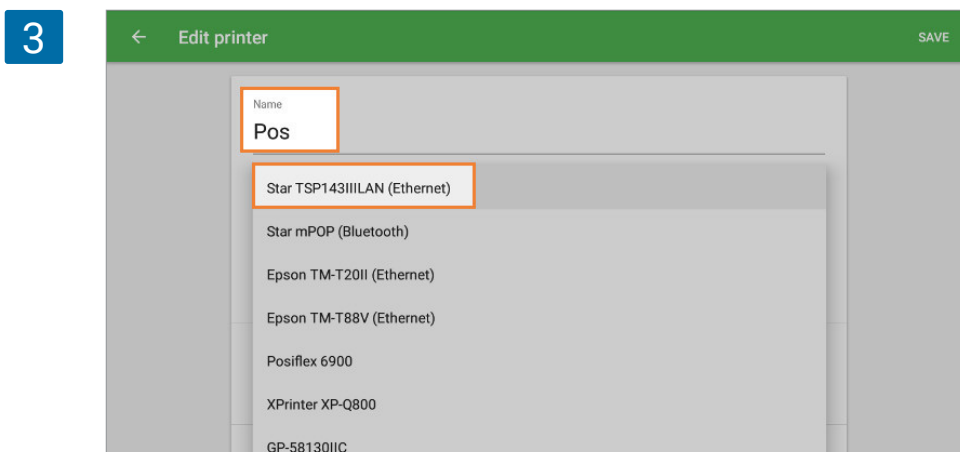
Then in the Loyverse POS app, go to Settings.



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

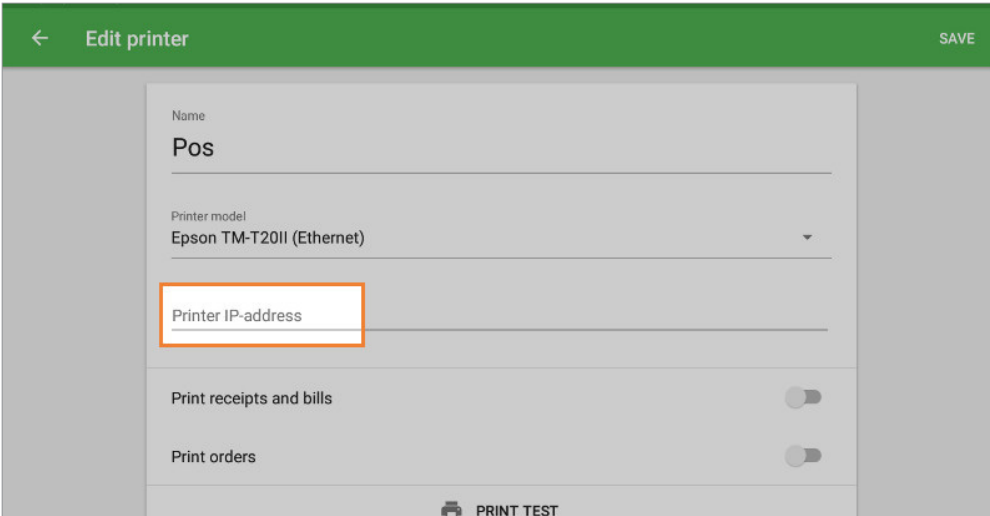


Type the title of your printer in the 'Name' field and select your printer model from the drop-down list.



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](#)).

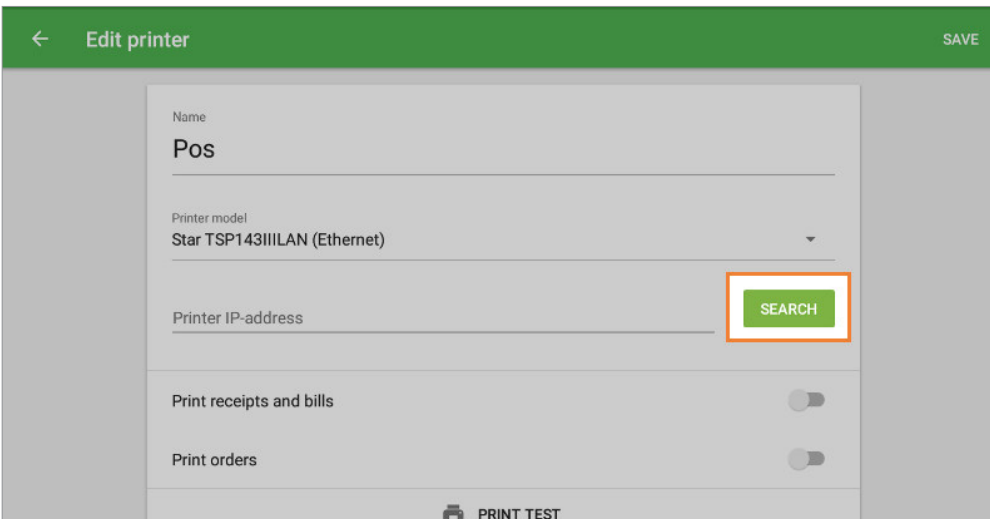
4



The screenshot shows the 'Edit printer' screen with a green header bar containing a back arrow and the text 'Edit printer', and a 'SAVE' button on the right. The form has several fields: 'Name' with the value 'Pos', 'Printer model' with a dropdown menu showing 'Epson TM-T20II (Ethernet)', and 'Printer IP-address' which is highlighted with an orange rectangular box. Below these are two toggle switches for 'Print receipts and bills' and 'Print orders', both currently turned off. At the bottom, there is a 'PRINT TEST' button with a printer icon.

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



This screenshot is similar to the previous one, but the 'Printer model' dropdown now shows 'Star TSP143IIILAN (Ethernet)'. The 'Printer IP-address' field is empty. A green 'SEARCH' button is highlighted with an orange rectangular box. The rest of the interface, including the toggle switches and 'PRINT TEST' button, remains the same.

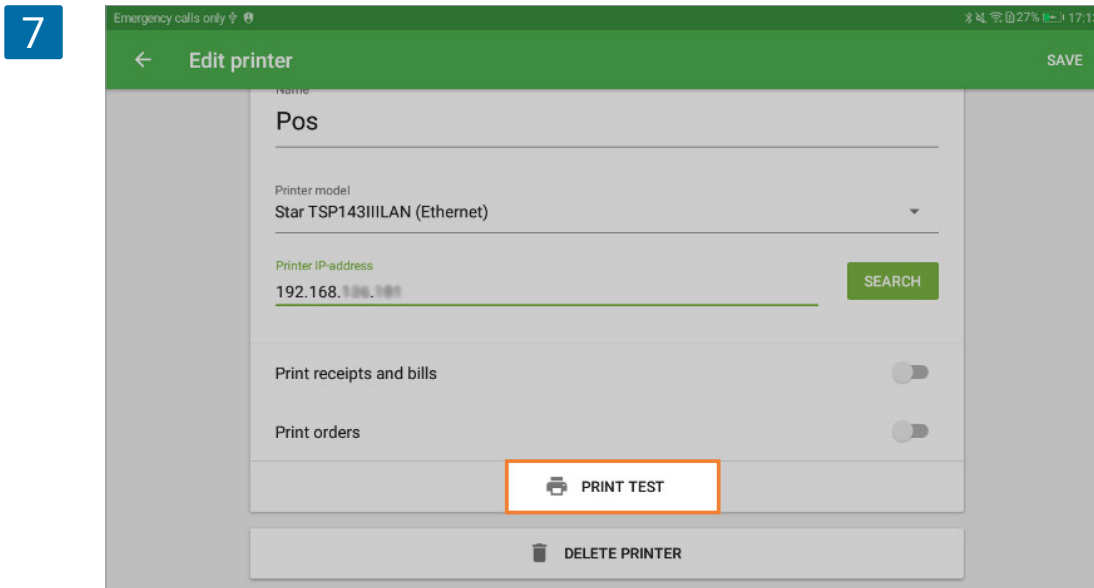
In the following pop up window, you will see the search result with the printer model and its IP address. Tap on it to select the IP-address and then close the window.

6



The screenshot shows a 'Search for a printer' pop-up window. The window has a title 'Search for a printer' and a list of search results. The first result is 'TSP143 (STR\_T-001)' with the IP address '192.168.126.101' below it. At the bottom right of the pop-up is a green 'CANCEL' button. The background shows the 'Edit printer' screen with the 'Printer IP-address' field and the 'SEARCH' button visible.

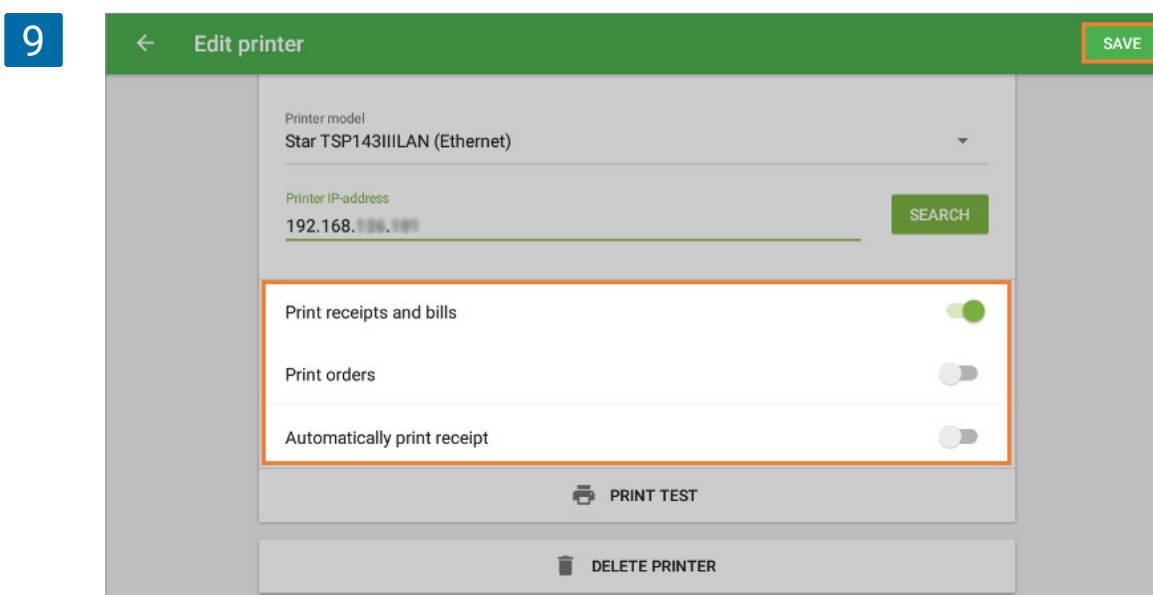
Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.



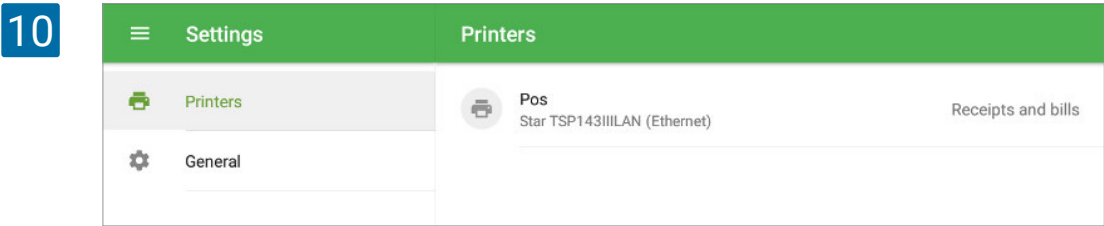
If a test receipt prints out successfully, then your printer is set up correctly.



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.



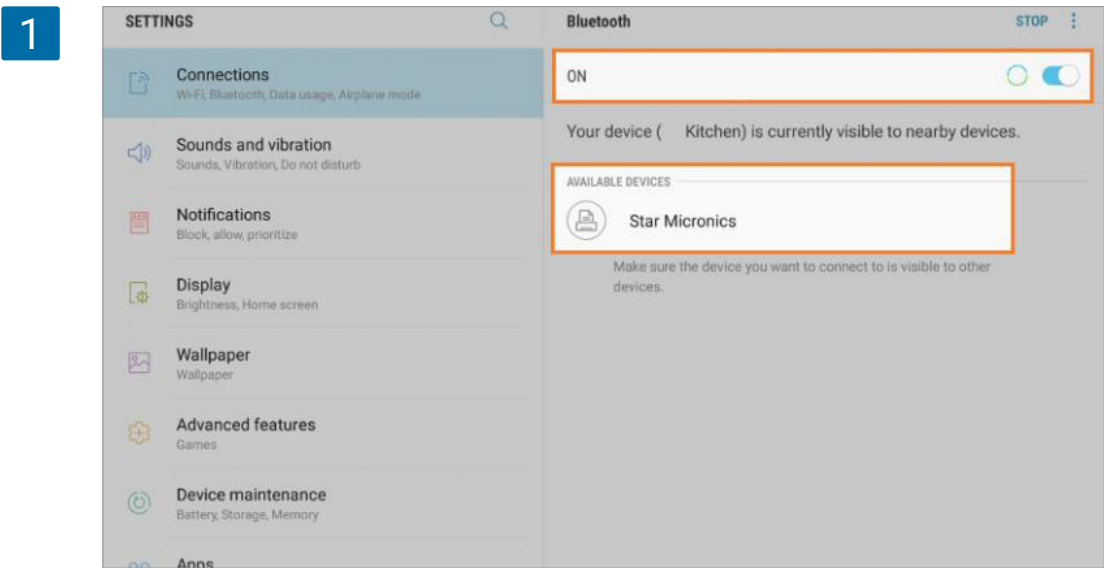
Now you can see your printer in the list. Nice work!



## 9.3 How to Set Up Bluetooth Receipt Printer with Loyverse POS

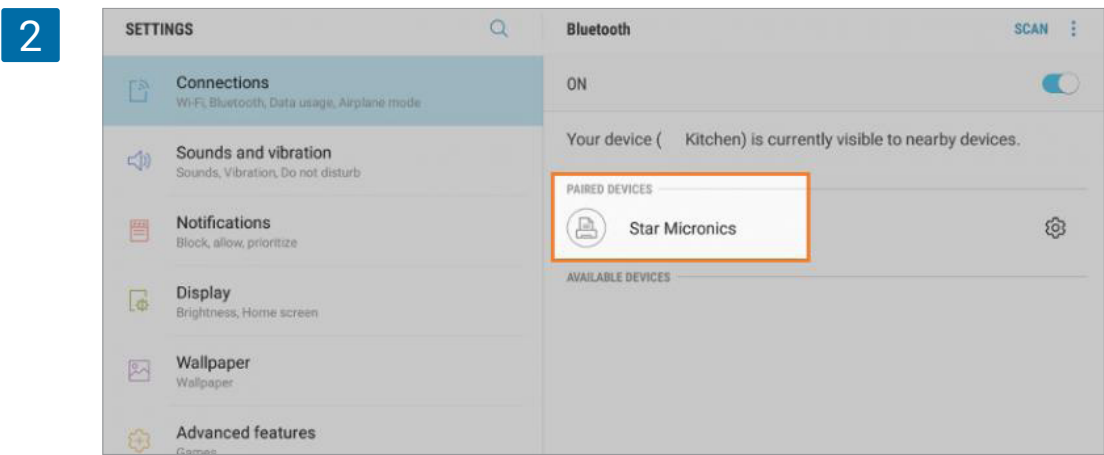
This guidance applies to printers on our supported printers list.

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.

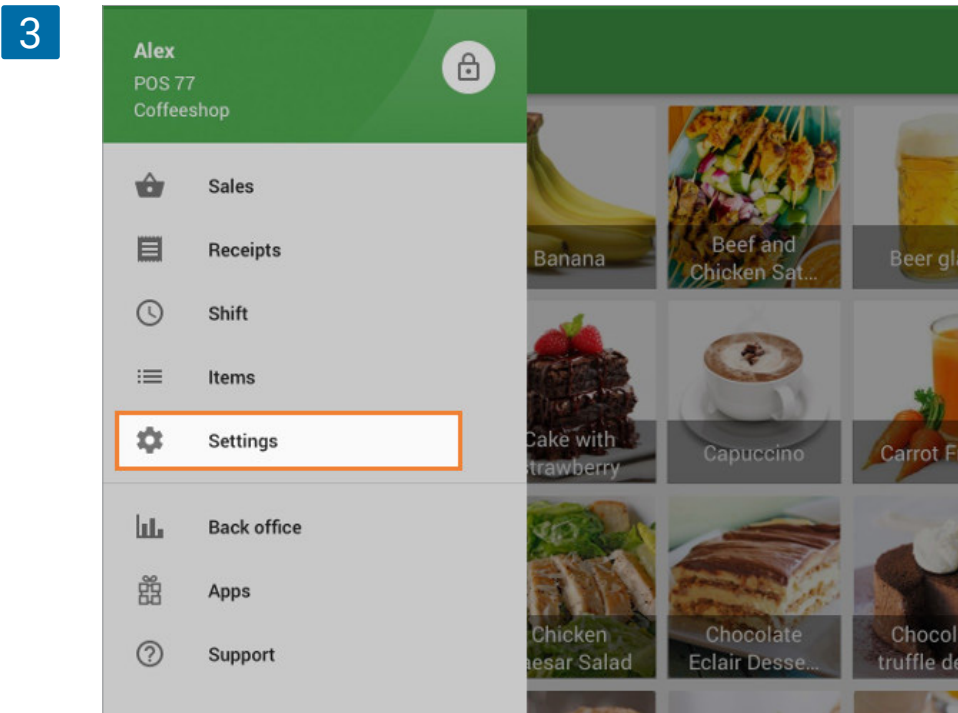


Push the 'Pair' button on your printer.

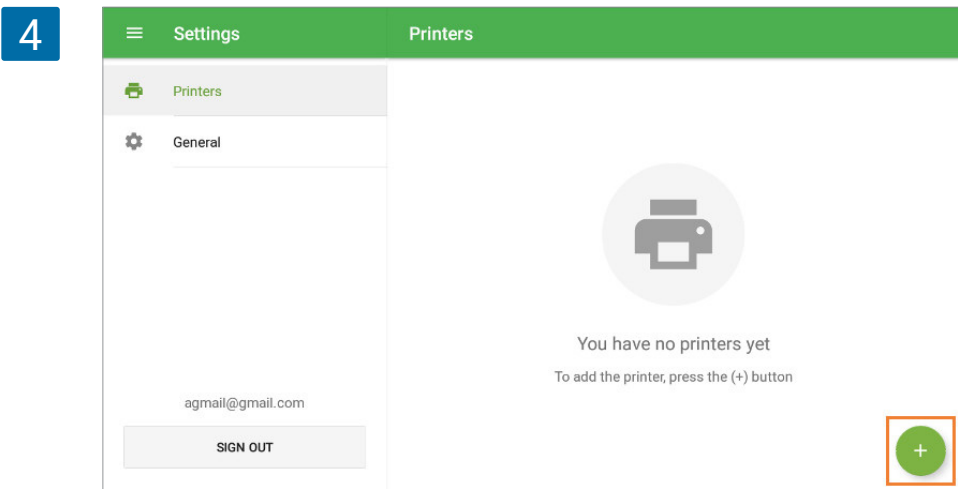
On your mobile device, choose your printer's model from the list of 'Devices'. After a few seconds, the 'Not Paired' status will change to 'Connected' or 'Paired'.



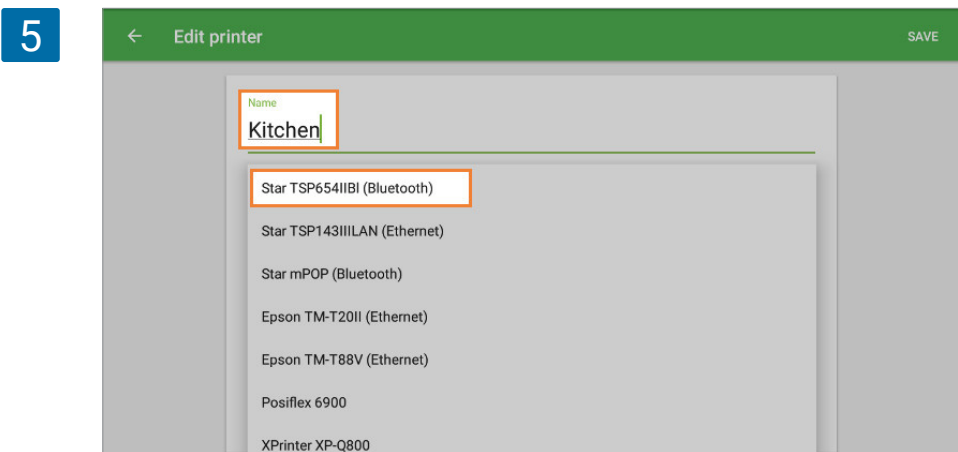
Then, in the Loyverse POS app, go to Settings.



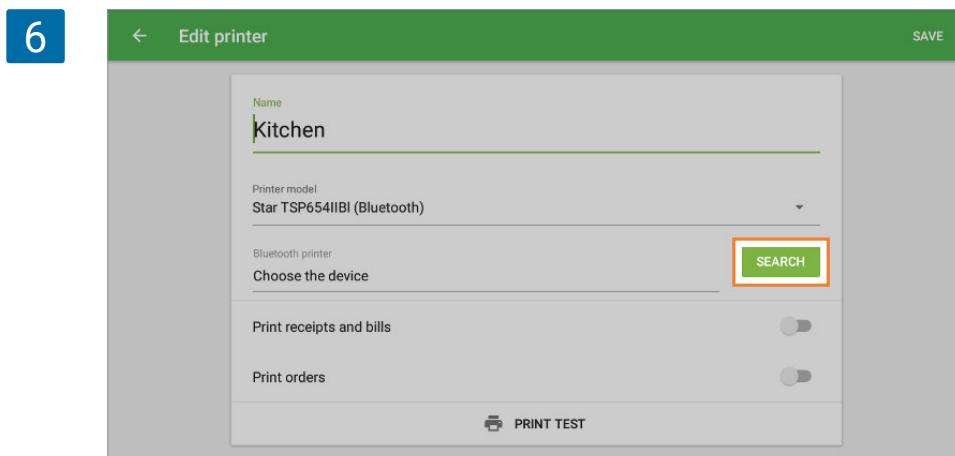
Create a printer by tapping on the '+' button.



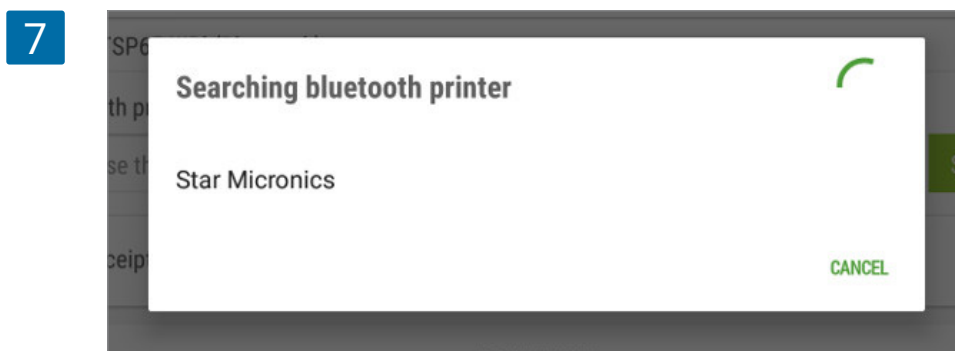
Type the title of your printer in the 'Name' field and select its model from the drop-down menu.



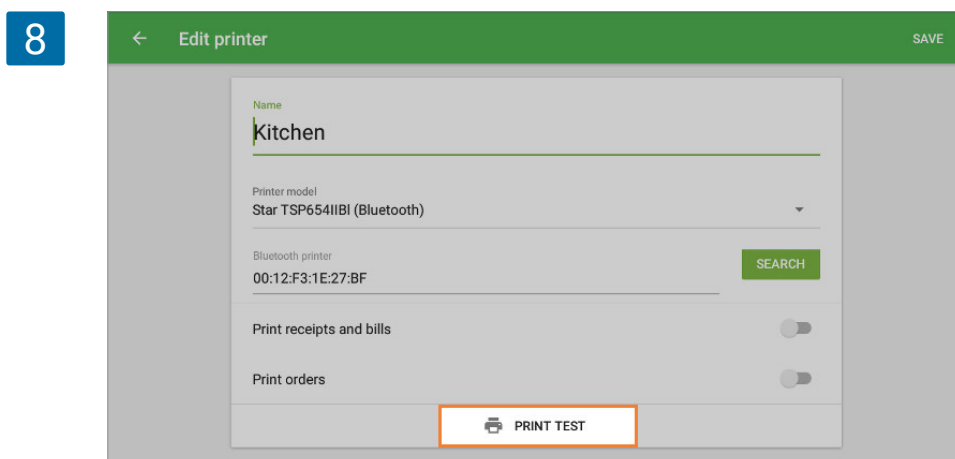
Tap the 'Search' button to search for your printer.



In the following pop up window, you will see the search result with the printer model. Tap to select and close the window.



Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.

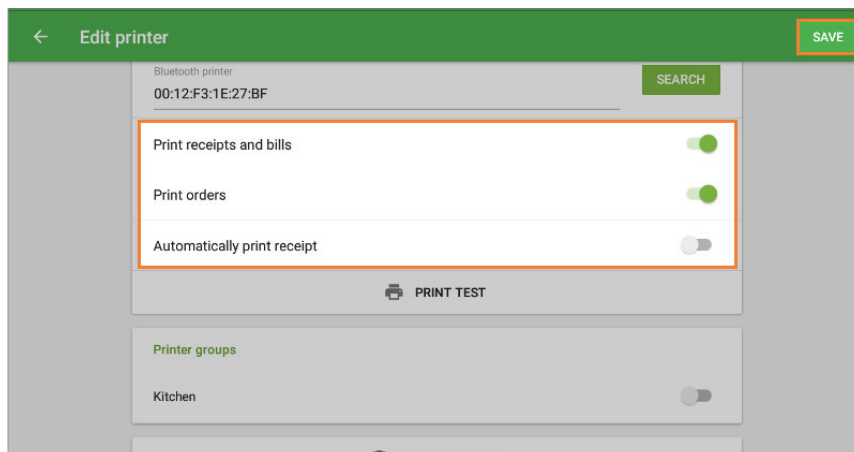


If a test receipt prints out successfully, then your printer is set up correctly.



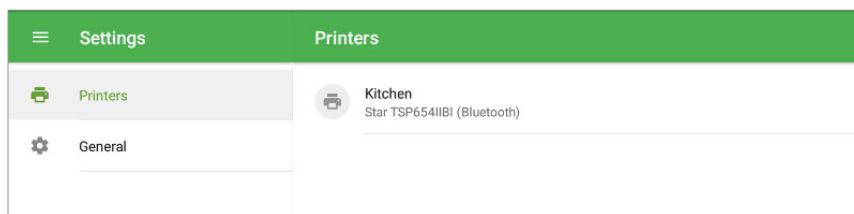
Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the 'Save' button.

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





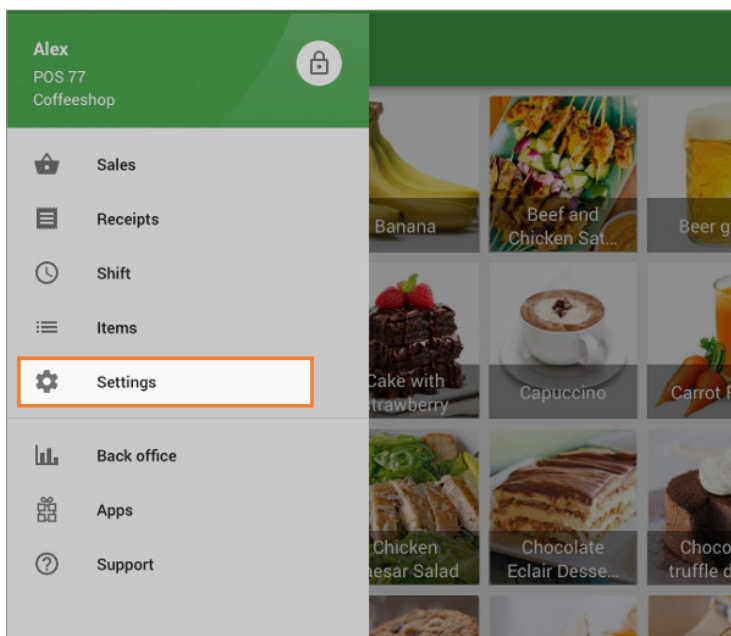
Connect the other end of the cable to the smartphone/tablet.

2



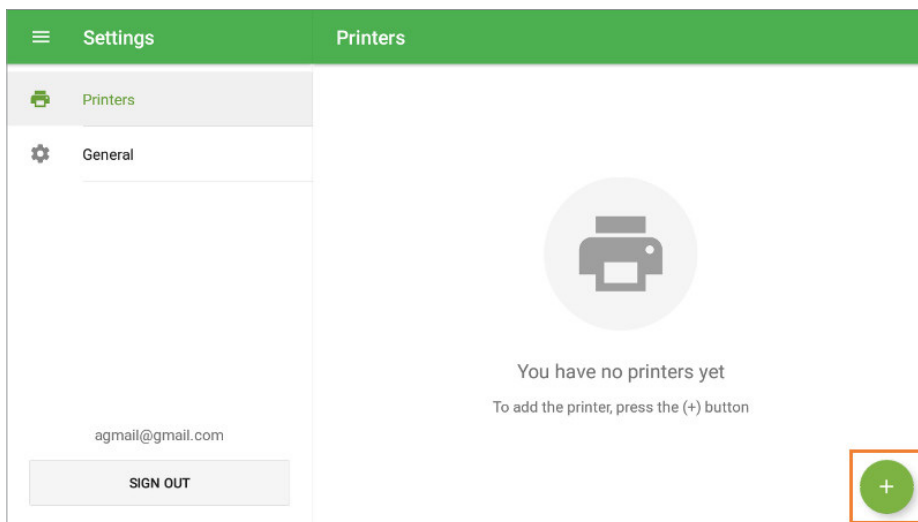
Then in the Loyverse POS app, go to Settings.

3



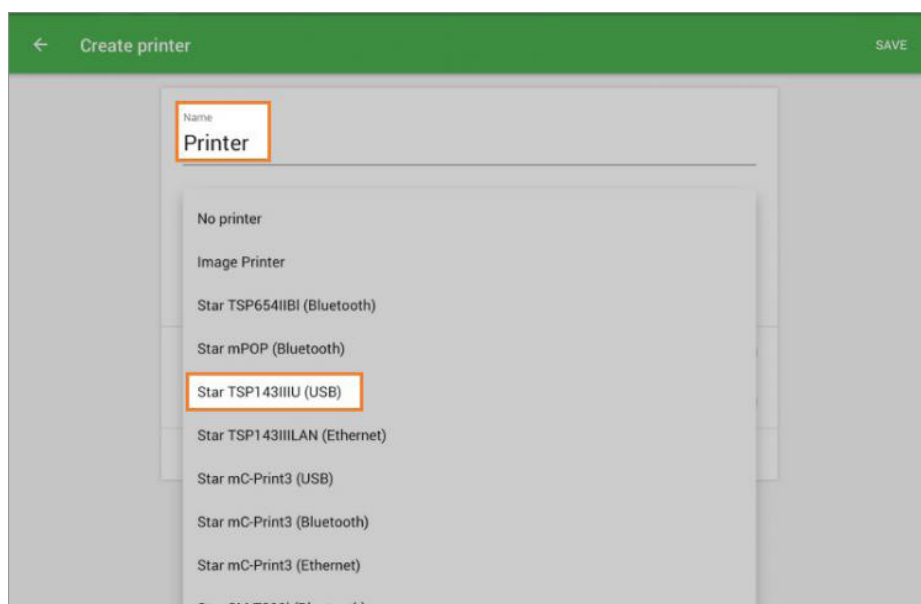
Create a printer by tapping on the '+' button.

4



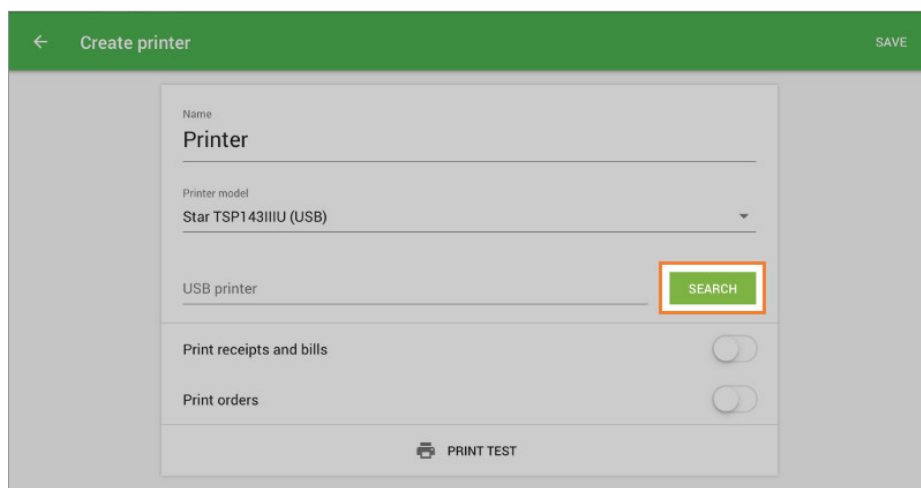
Name your printer in the 'Name' field and select the model of your USB printer from the 'Printer model' list.

5



Tap the 'Search' button to search for your printer.

6

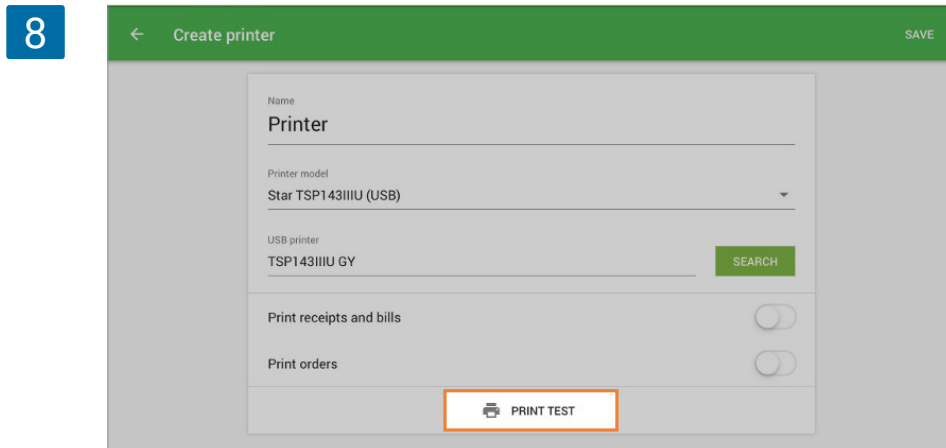


In the following pop up window, you will see the search result with the printer model. Tap to select and close the window by tapping 'OK'.

7



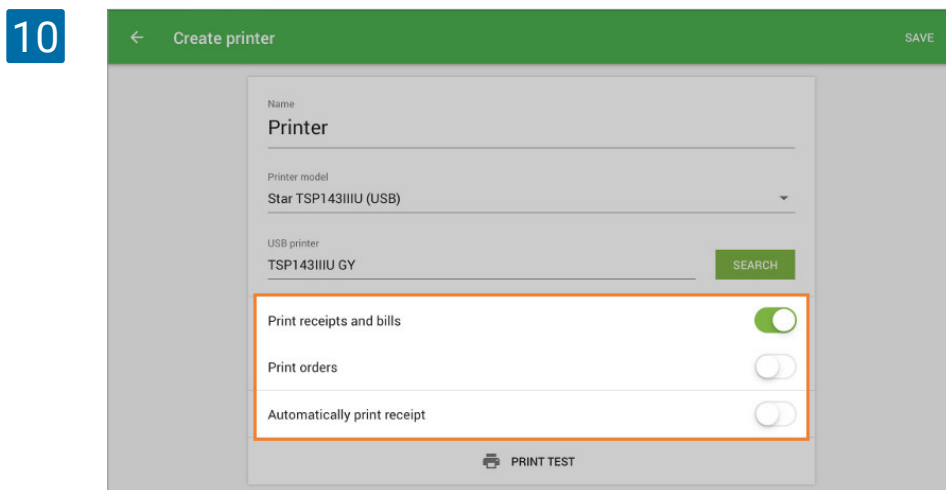
Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.



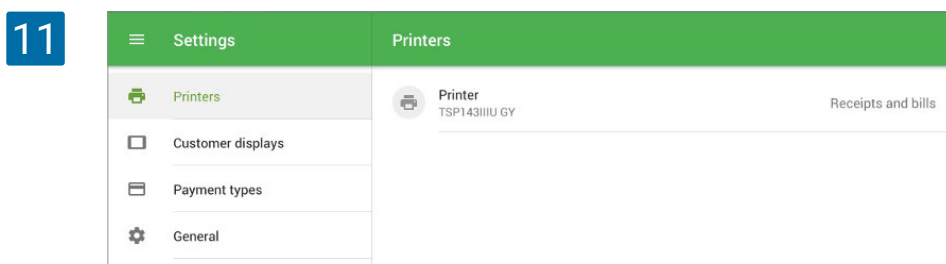
If a test receipt prints out successfully, then your printer is set up correctly.



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.



Now you can see your printer in the list. Nice work!



## 9.5 How to Set Up a USB Printer with an Android Device

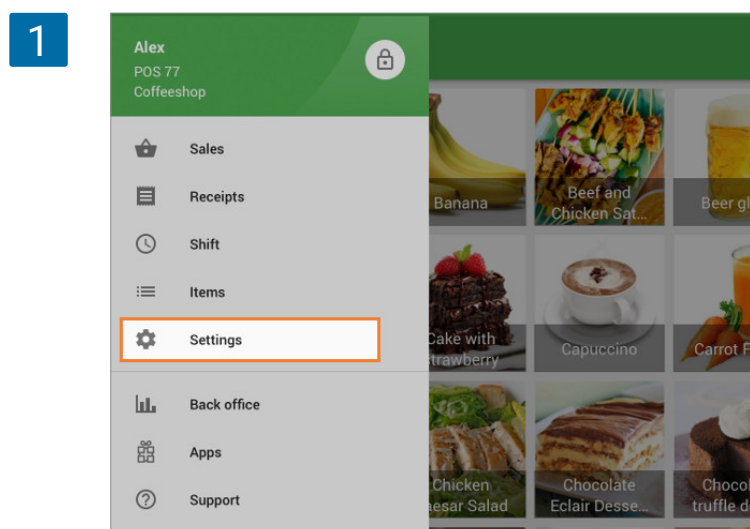
For a USB printer to work with Loyverse POS, you will need the following

- 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

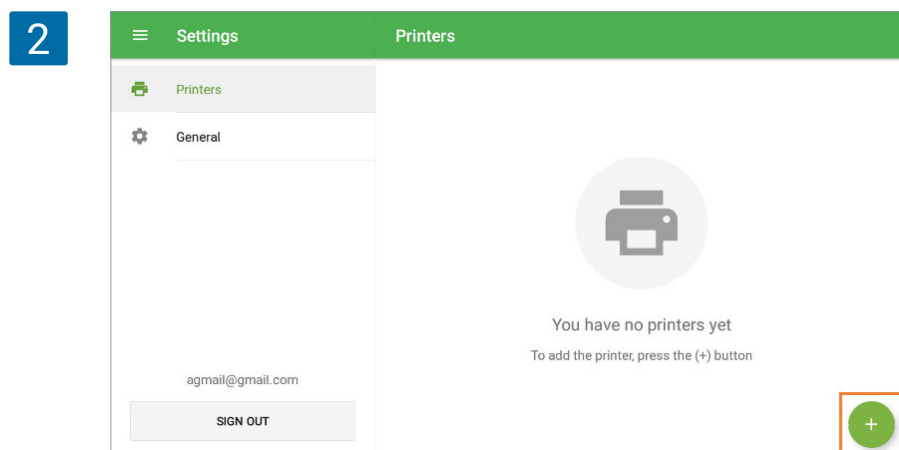
Plug one end of the USB cable into the USB port of the printer, and the other end into the female USB connector of an OTG adapter or cable. Then, plug the micro-USB end of the OTG adapter or cable into the micro-USB port of your mobile device, and wait for the system to recognize the printer.

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.



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



Name your printer in the 'Name' field and select 'Other model' from the 'Printer model' list.

3

← Create printer SAVE

Name  
Pos

Epson TM-T88V (Ethernet)  
Posiflex 6900  
XPrinter XP-Q800  
GP-58130IIC  
GP-U80300I  
GP-L80250I  
Other model  
Kitchen display

Select 'USB' in the 'Interface' field.

4

← Edit printer SAVE

Name  
Pos

Printer model  
Other model

Interface  
Ethernet  
Bluetooth  
USB

Paper width  
80 mm

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

← Create printer SAVE

Name  
Pos

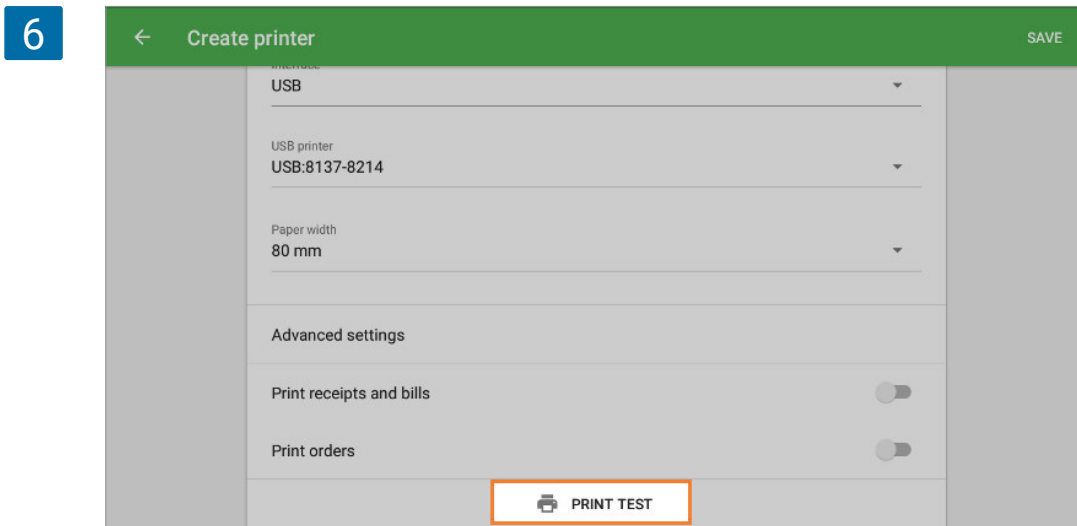
Printer model  
Other model

Interface  
USB

USB printer  
USB:8137-8214

Paper width  
80 mm

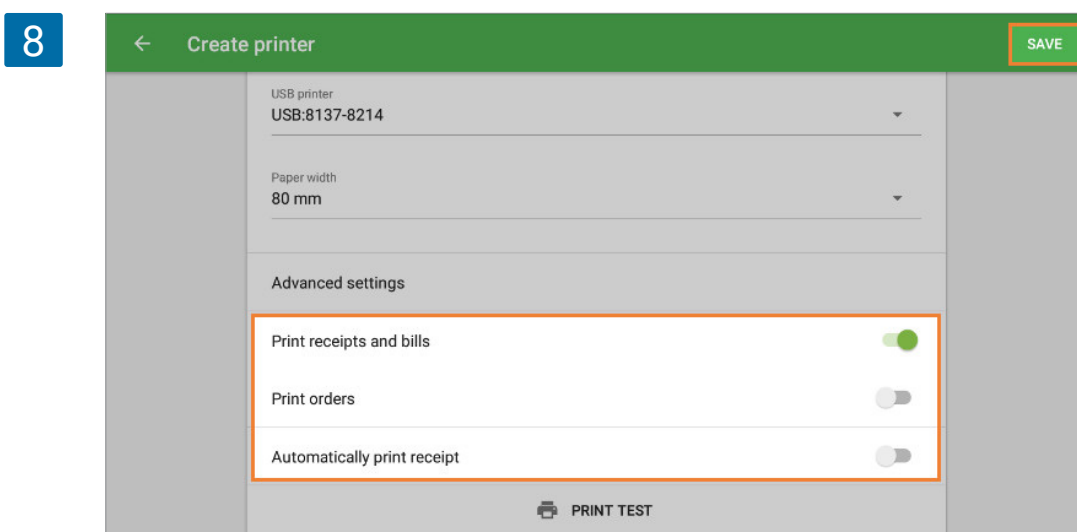
Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.



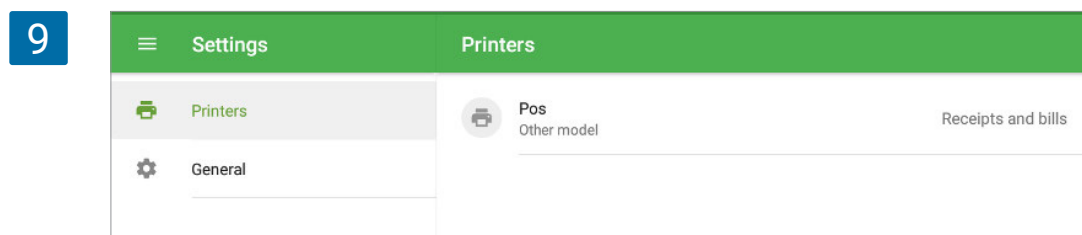
If a test receipt prints out successfully, then your printer is set up correctly.



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.



Now you can see your printer in the list. Nice work!



## 9.6 How to Set Up Other Printers in Loyverse POS on Android

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.

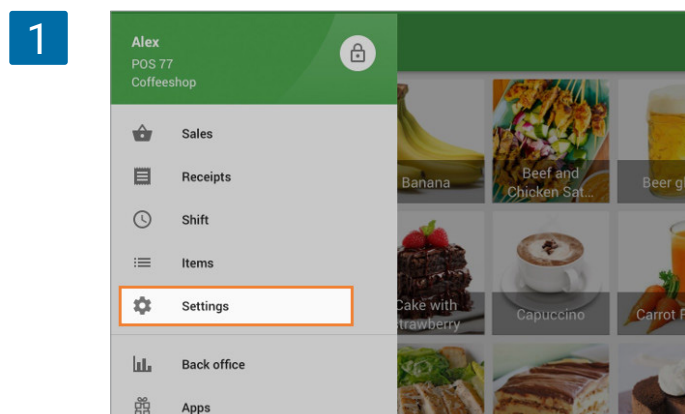
Consult the printer manual or the manufacturer website to see if your receipt printer fits these requirements. If so, the printer may work with Loyverse POS; however, there might be special cases.

### Connect or pair your printer with a mobile device

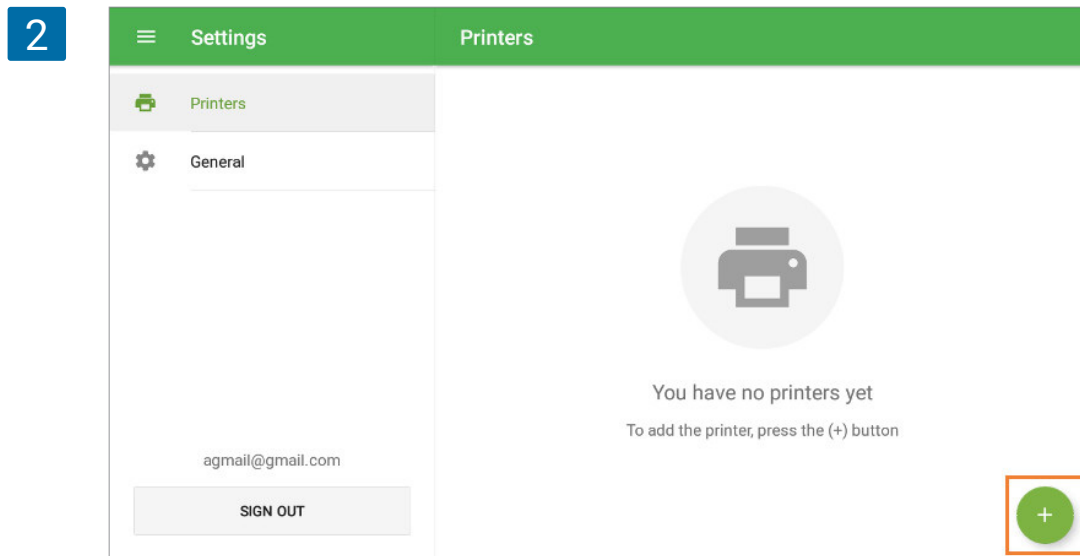
**For Ethernet printer:** connect your mobile device to the Wi-Fi router and connect your Ethernet printer to the router via an ethernet cable (details: [How to Set Up an Ethernet Printer in Loyverse POS](#)).

**For Bluetooth printer:** pair a printer with your mobile device (details: [How to Set Up Bluetooth Receipt Printer with Loyverse POS](#)).

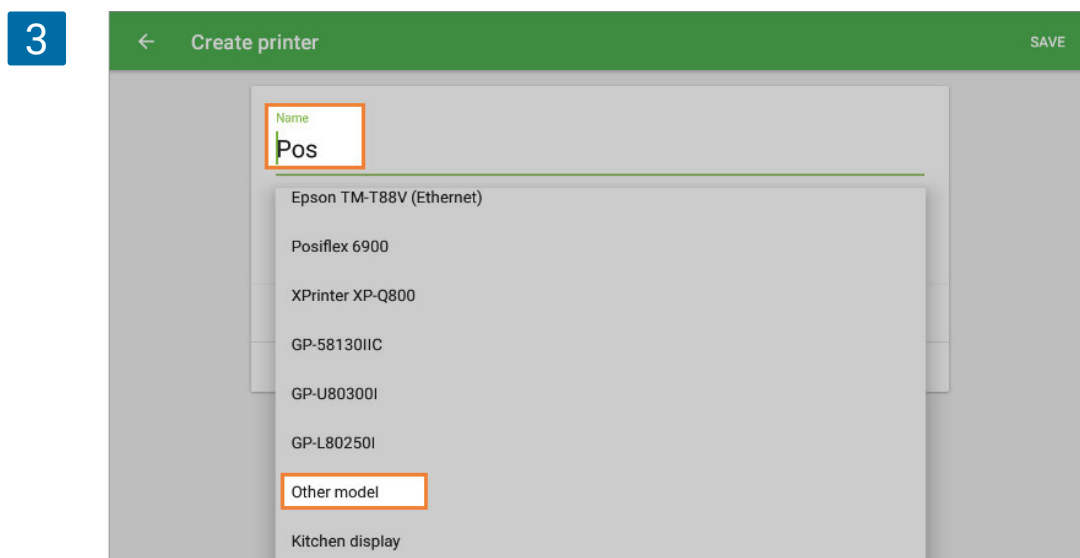
**For USB printer:** connect your mobile device to the USB printer via a USB cable and OTG adapter or cable (details: [How to Set Up a USB Printer with an Android Device](#)). Then, in the Loyverse POS app, go to Settings.



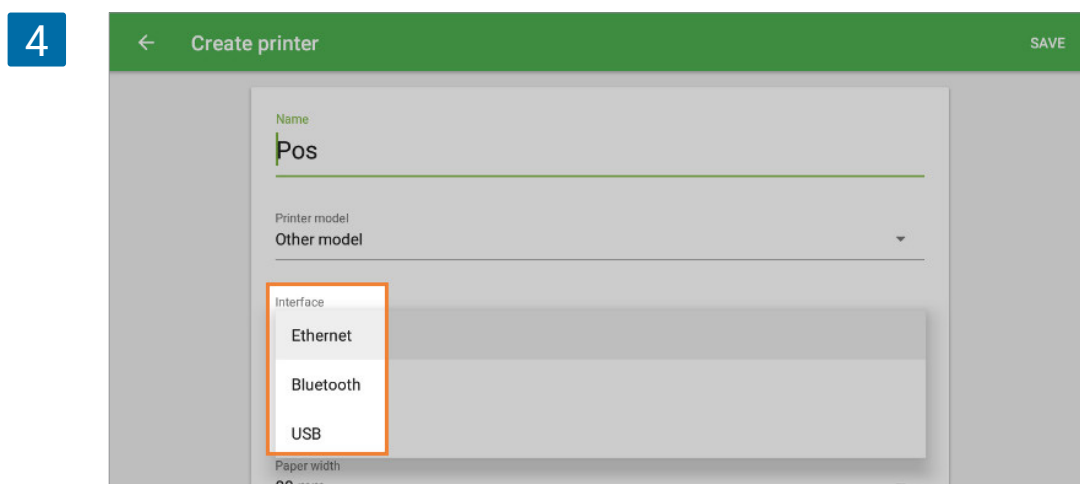
Create a printer by tapping on the '+' button.



Name your printer in the 'Name' field and select 'Other model' from the drop-down list of printer model.



Select your printer interface in the 'Interface' field.





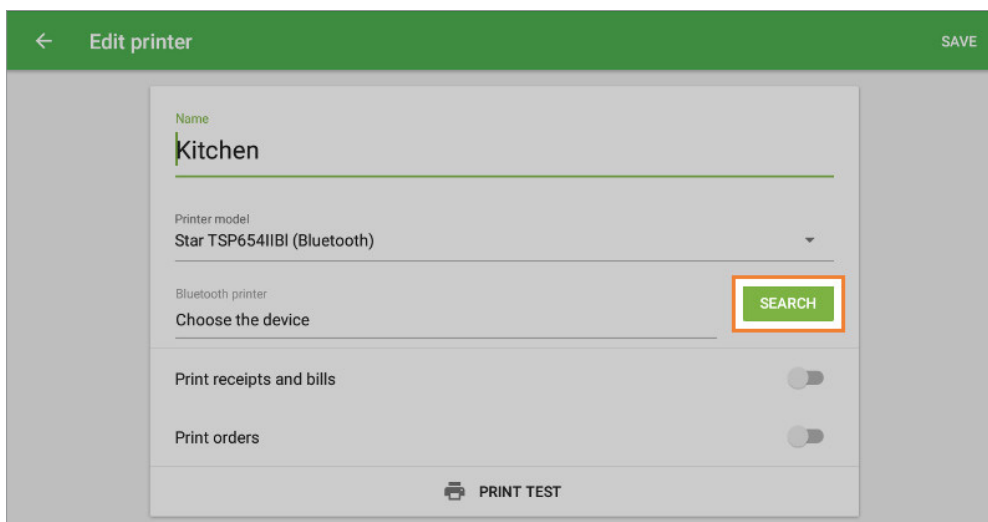
**For Ethernet printer**, fill in the 'Printer IP-address' field, which can be found in your printer's network configuration report (details: [Troubleshooting When Setting Up an Ethernet Printer](#))

5

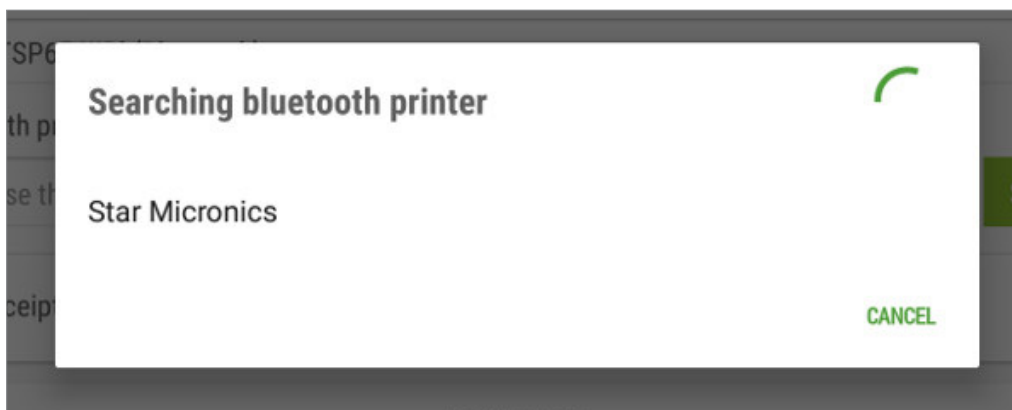


**For Bluetooth printer**, tap the 'Search' button to search for your printer and in the following pop-up window, select your printer.

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.



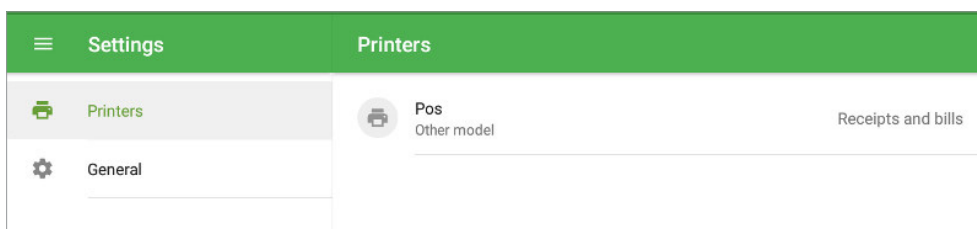
Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the 'Save' button.

12



Now you can see your printer on the list. You are ready to start selling and printing receipts or orders.

13



## 9.7 How to Set Up Other Printers in Loyverse POS on iOS

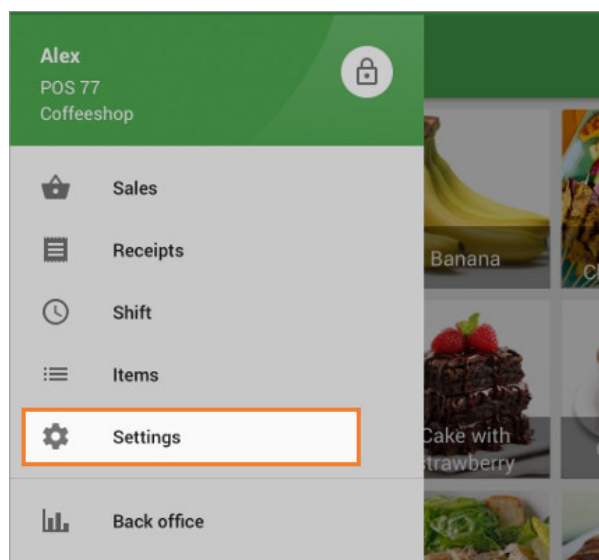
Loyverse POS works with receipt printers on the Supported Printers list. However, for iOS devices, you can try to connect Ethernet receipt printers' models that are not on the Supported Printers list. But be aware that not every printer may work with Loyverse POS!

These are the general requirements for a receipt printer to be compatible with Loyverse POS on iOS devices:

- support ESC/POS commands that are the same as Epson printers;
- have an Ethernet interface.

Consult the printer manual or the manufacturer's 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.

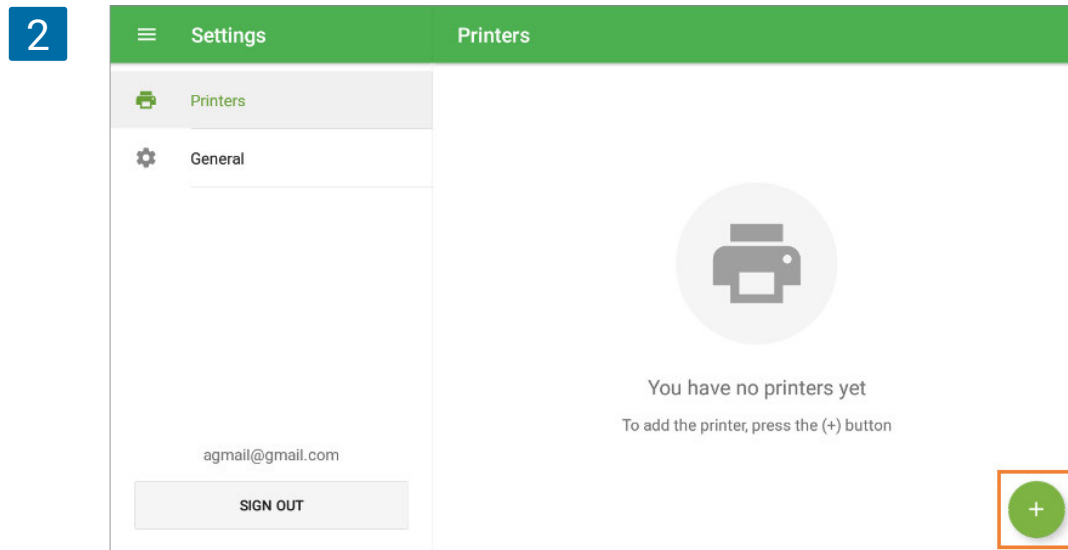
1



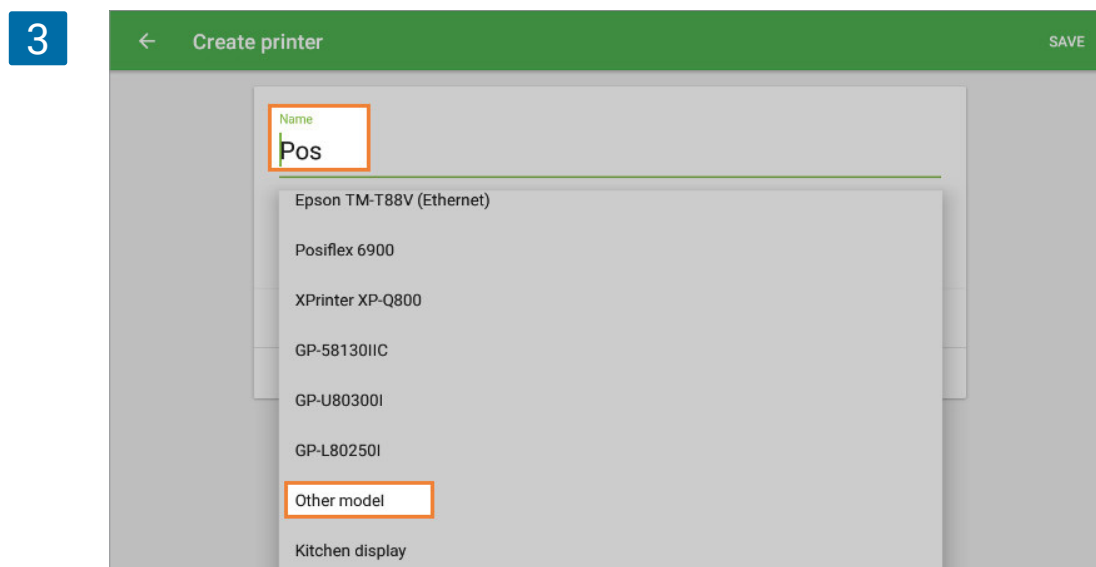
Connect your mobile device to the Wi-Fi router and connect your Ethernet printer to the router via an Ethernet cable (details: [How to Set Up an Ethernet Printer in Loyverse POS](#)).

Then, in the Loyverse POS app, go to Settings.

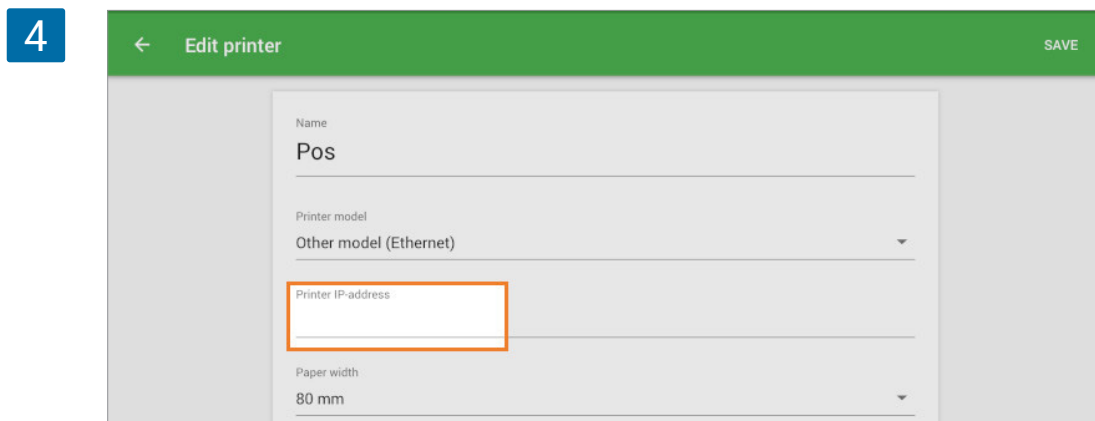
Create a printer by tapping on the '+' button.



Name your printer in the 'Name' field and select 'Other model' from the drop-down list of printer models.

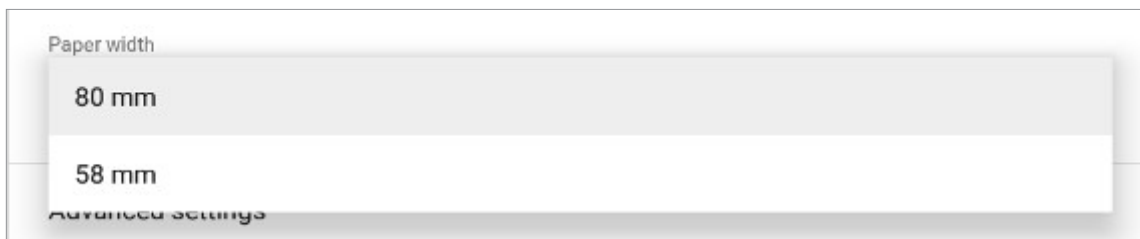


Fill in the 'Printer IP-address' field, which can be found in your printer's network configuration report (details: [Troubleshooting When Setting Up an Ethernet Printer](#))



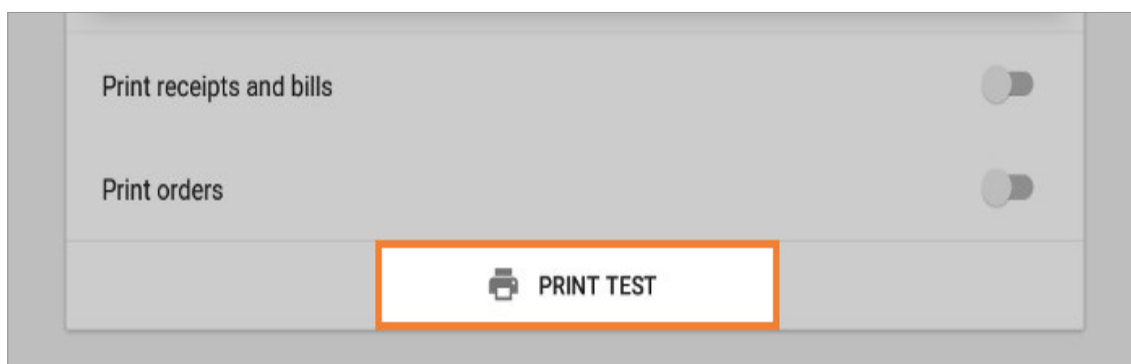
Choose the paper width of your printer.

5



Tap the 'Print test' button to check your printer's connection with the Loyverse POS app.

6



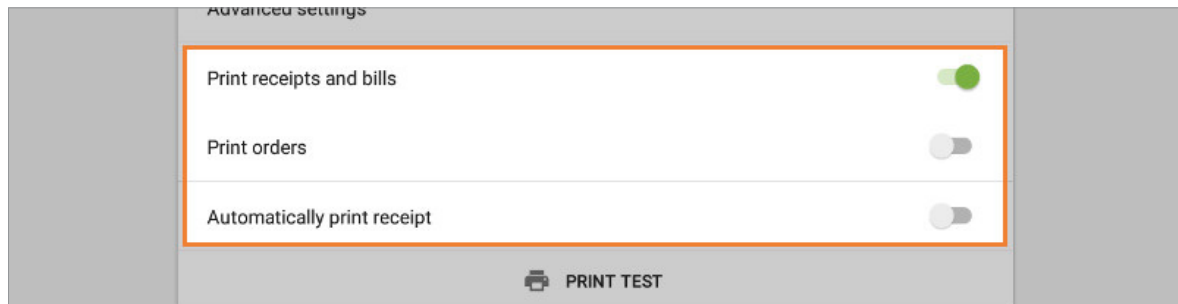
If a test receipt prints out successfully, then your printer is set up correctly.

7



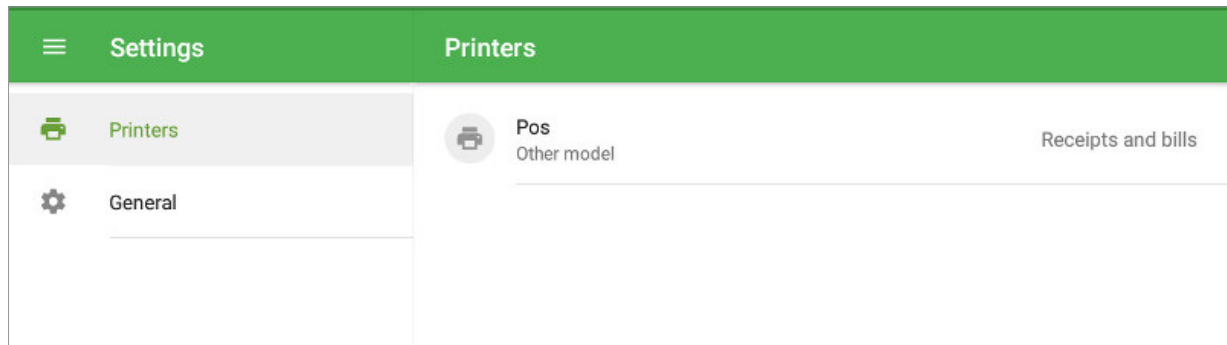
Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the 'Save' button.

8



Now you can see your printer on the list. You are ready to start selling and printing receipts or orders.

9



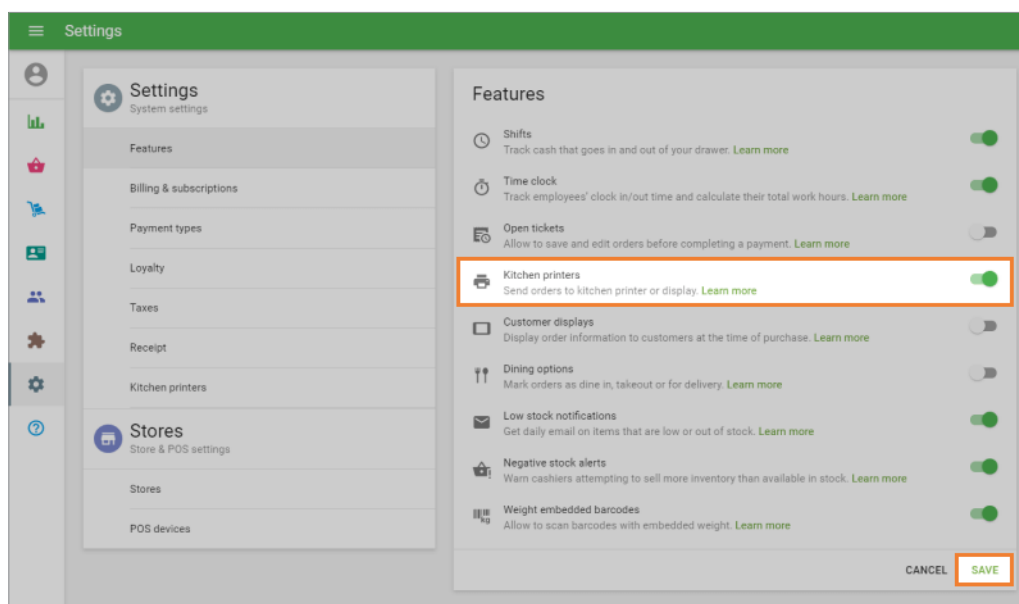
## 9.8 Using Kitchen Printers with Loyverse POS

Cafes and restaurants use kitchen printers to inform the cooking staff what to prepare from an order.

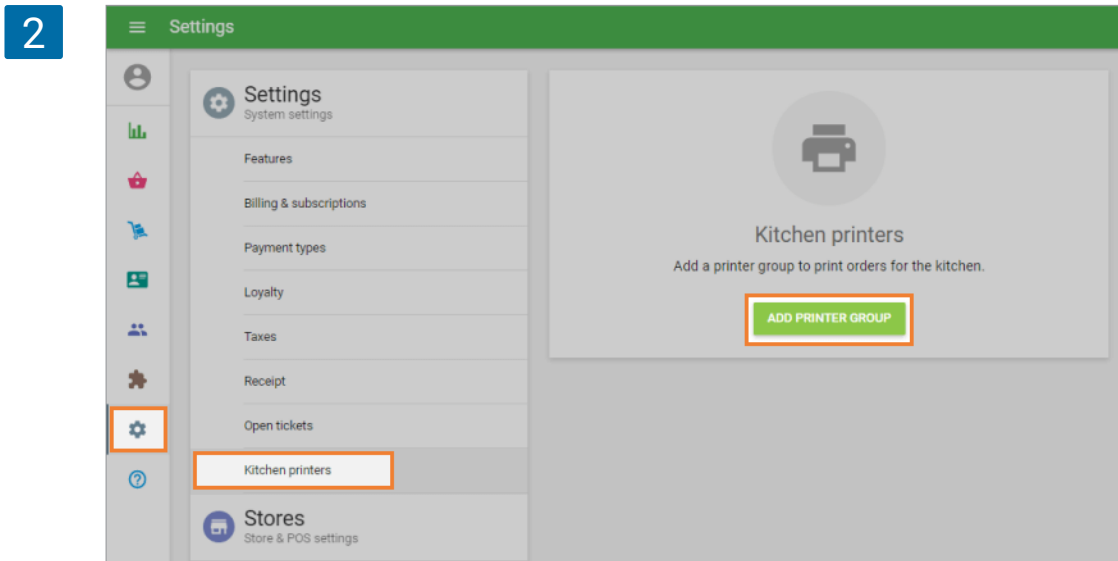
### 9.8.1 Configuring Loyverse Back Office

Log in to the Back Office, navigate to the Settings menu, Features section, and switch on the 'Kitchen Printers' slider.

1

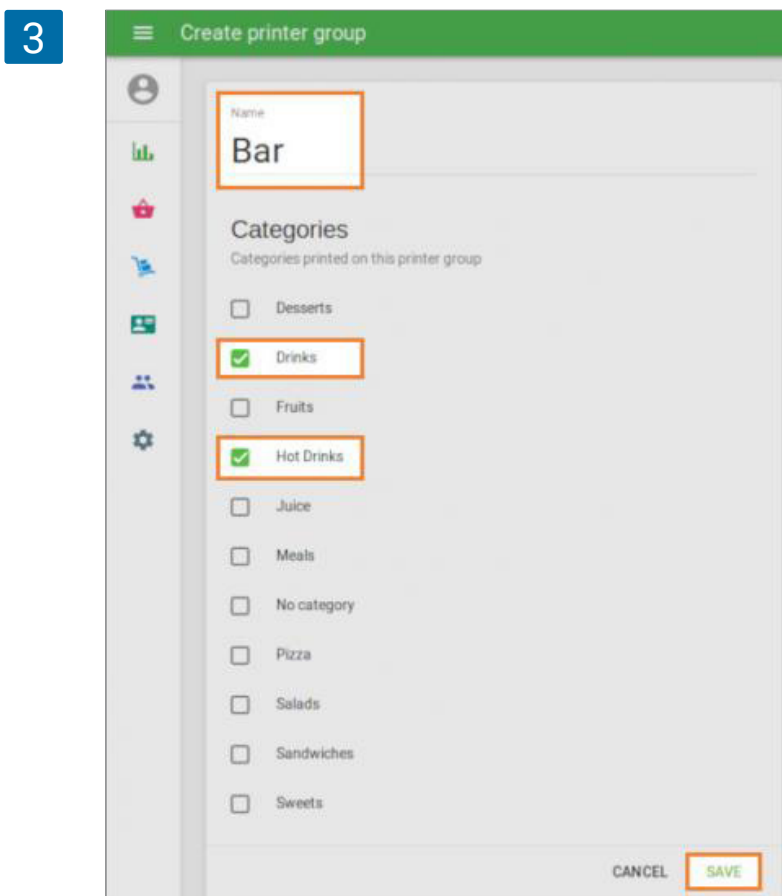


Click the Kitchen Printers menu and create a printer group.



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.

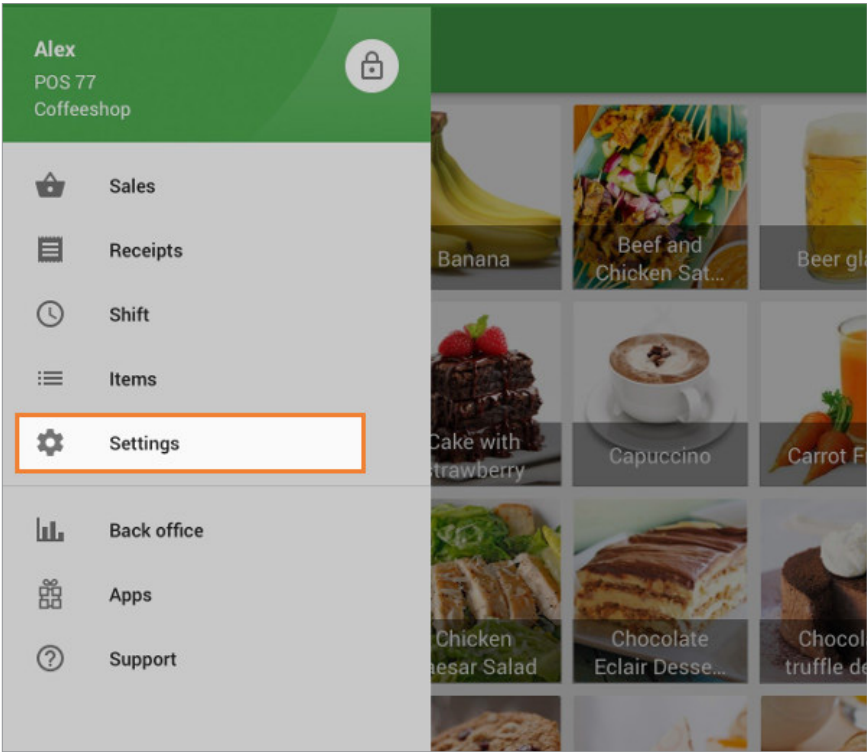
Tick item categories that should be included in this printer group and save your selection.



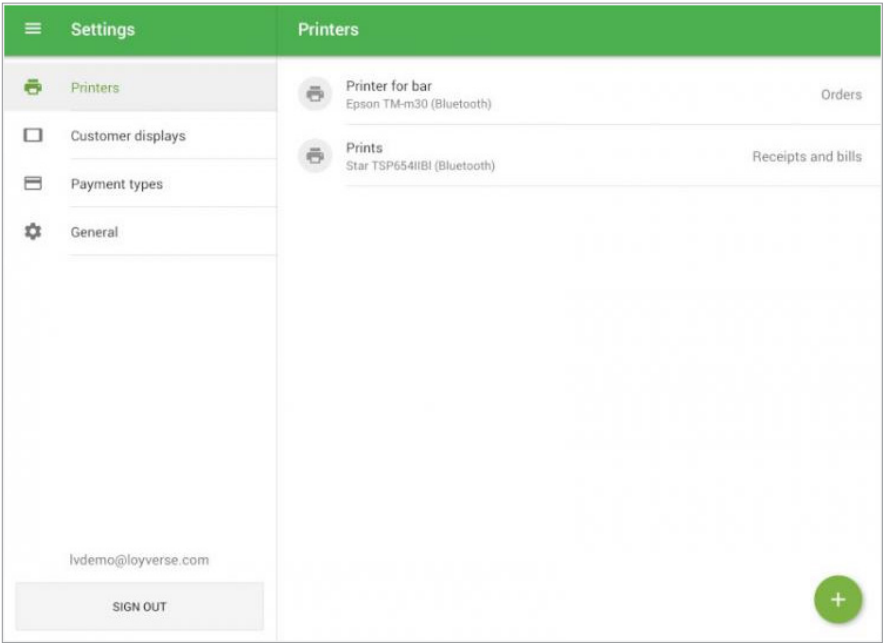
# 9.8.2 Setting Up the Loyverse POS App

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

← Edit printer SAVE

Name  
Printer for bar

Printer model  
Epson TM-m30 (Bluetooth)

Bluetooth printer  
Epson TM-m30 (Bluetooth) SEARCH

Print receipts and bills ☐

Print orders ☒

PRINT TEST

Printer groups ☒

Bar

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

\*\*\* Bar \*\*\*

**#86-002**

**Table 2**

29/12/2023 15:59  
Andy, POS 1

.....

**Dine in**

.....

**2 x Capuccino**  
Milk  
Sugar

**1 x Black Tea**

**1 x Croissant**

.....

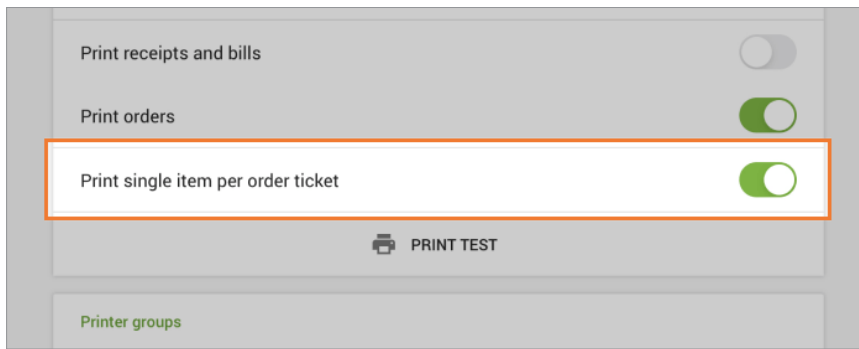
If you correct an open ticket by deleting or adding an item, the kitchen printer will print a corresponding ticket.

5



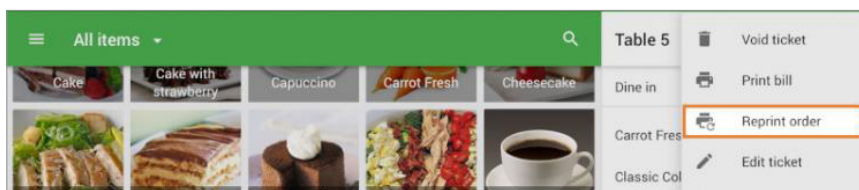
Sometimes, it is convenient to print each item in the order separately instead of having the whole order printed at once. To do that (for iOS only) turn the toggle “Print single item per order ticket” on, and then each item in the order will be printed as a separate ticket.

6



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.

7



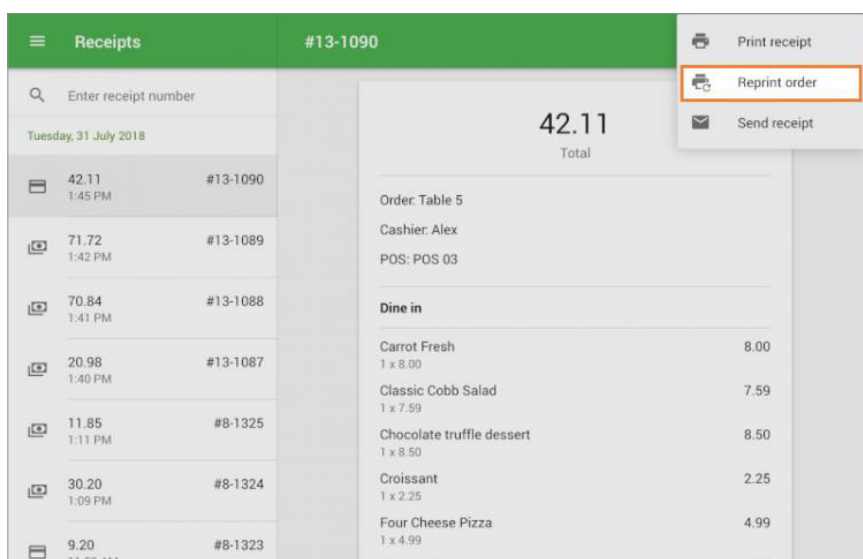
8



The kitchen printer will reprint the ticket with the mark ‘Reprint’.

You can reprint the kitchen orders for 2 hours after closing the open ticket from the Receipts section.

9



## 9.9 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

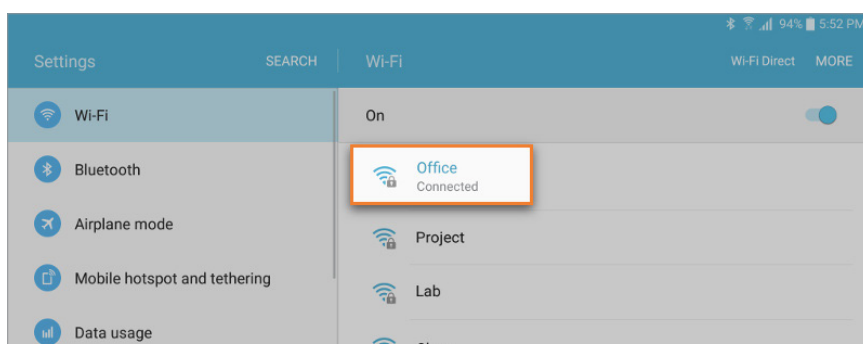
- Check that the paper is loaded and that there are no paper jams.
- Check the cable connections; both power and ethernet cables going from the printer and Wi-Fi router.
- Ensure that the printer and router power indication lights are on.
- Verify that the printer has no flashing lights or Red lights 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.

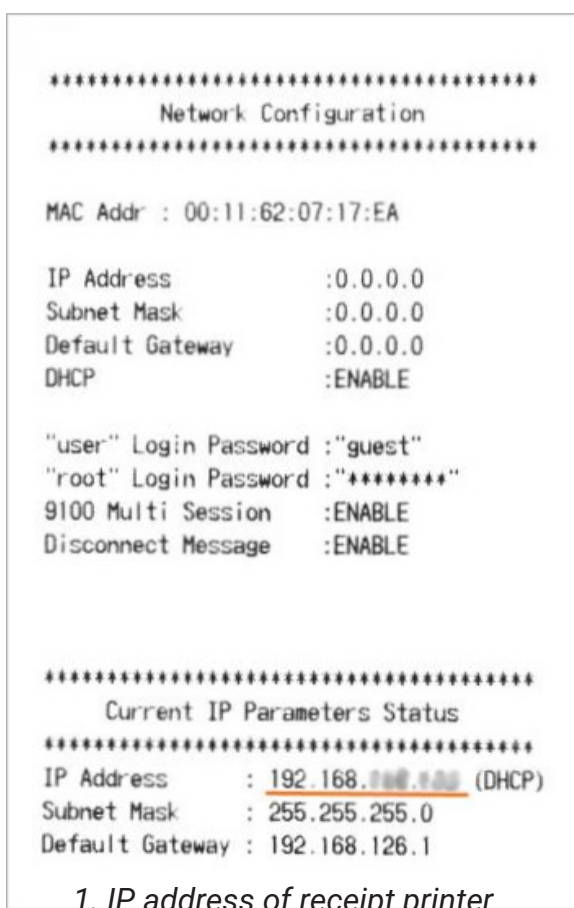
## 2) Next, verify that the receipt printer and the router are on the same subnet.

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

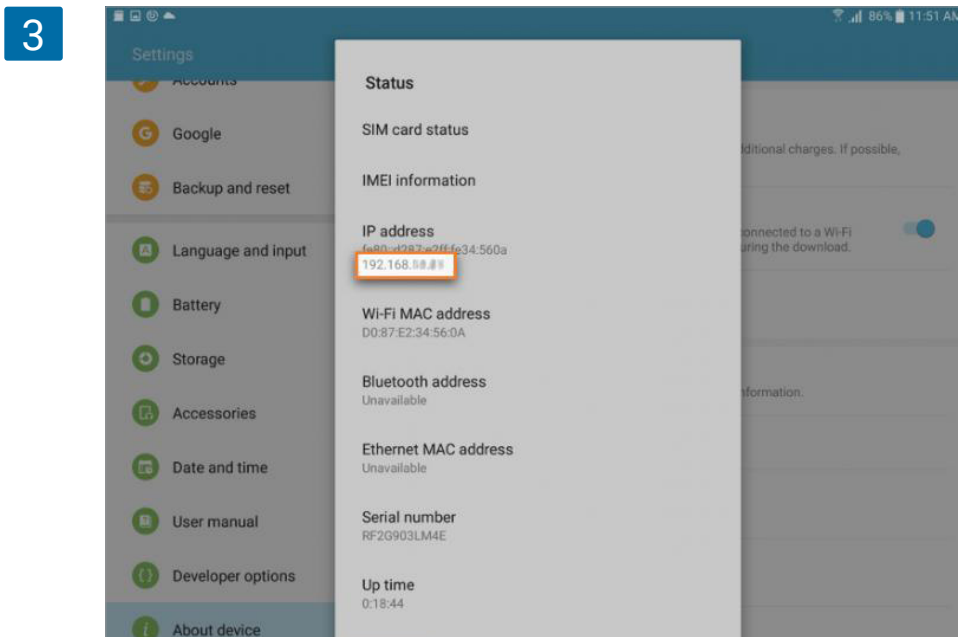
You can find the IP address of your printer under the "Current IP Parameters Status" section (underlined by orange below).

2



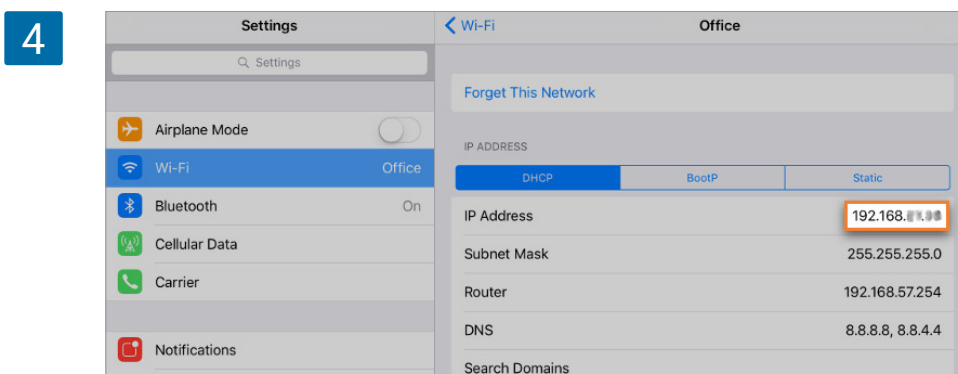
Then, you have to check the IP address of your router network. It is possible to do on your mobile device, connected to your router's Wi-Fi.

On **Android mobile devices**, go to Settings, and in the 'About device' menu, tap Status and check the IP address line.



2. IP address of your router

On Apple mobile devices go to Settings and just tap your active Wi-Fi connection.



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.

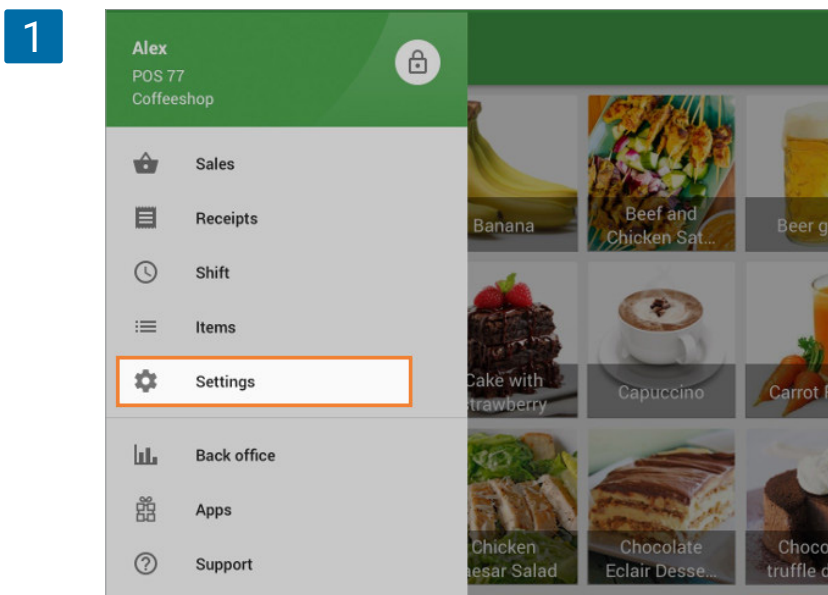
## 9.10 Connecting Built-in Printers on Sunmi Devices

Loyverse POS app for Android is compatible with built-in printers on Sunmi devices.

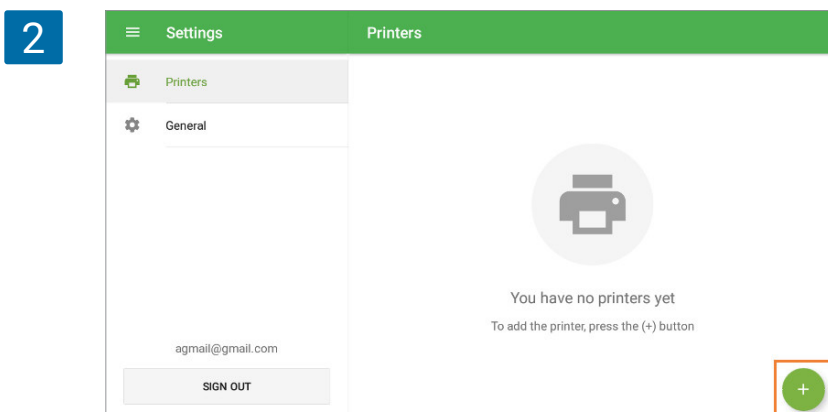
The list of supported Sunmi devices:

- 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.



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



Type the title of your printer in the 'Name' field and select SUNMI from the drop-down menu of printers models.

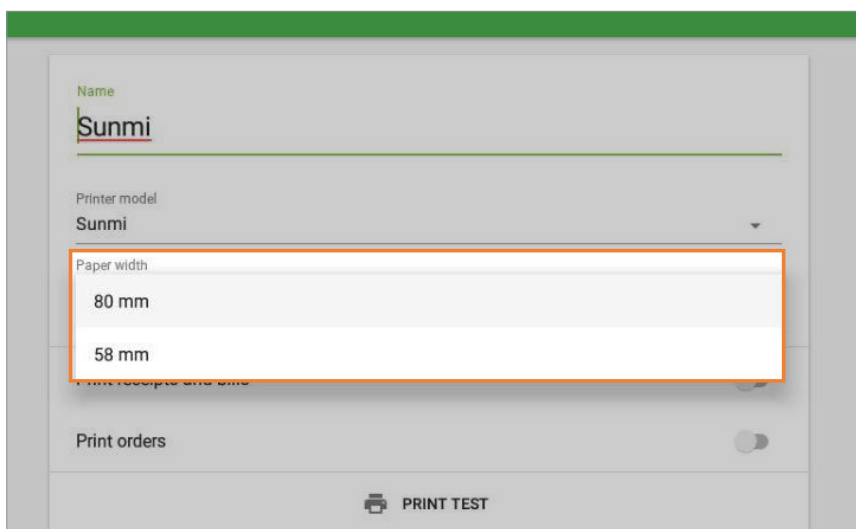
2



A screenshot of a web form for configuring a printer. The 'Name' field contains 'Sunmi'. The 'Printer model' dropdown menu is open, showing a list of printer models: Epson TM-T88V (Ethernet), Epson TM-m30, Sunmi (highlighted with an orange border), Posiflex 6900, XPrinter XP-Q800, GP-58130IIC, and GP-U80300I.

Select 'Paper width' of the printer.

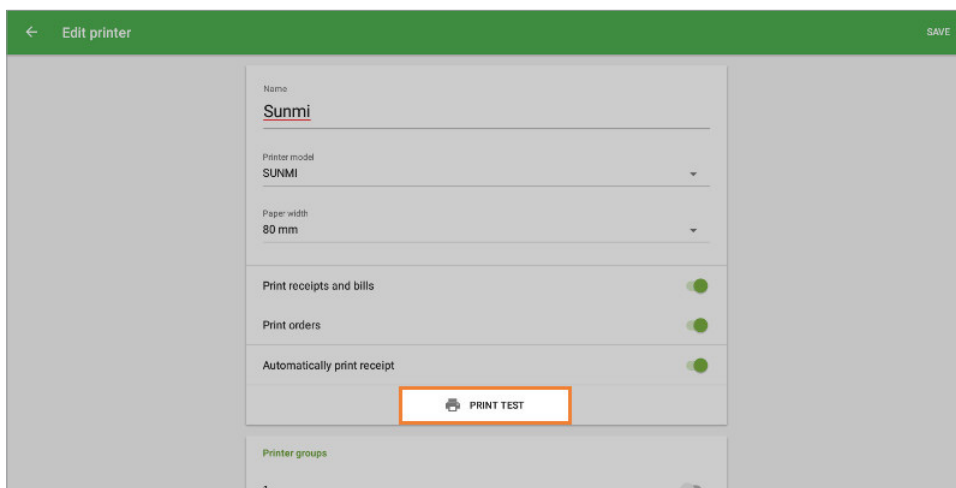
3



A screenshot of the same web form. The 'Printer model' is now set to 'Sunmi'. The 'Paper width' dropdown menu is open, showing two options: 80 mm (highlighted with an orange border) and 58 mm.

Tap the 'Print test' button to test your printer's connection with the Loyverse POS app.

4



A screenshot of the 'Edit printer' form. The 'Name' field contains 'Sunmi', 'Printer model' is 'SUNMI', and 'Paper width' is '80 mm'. There are three toggle switches: 'Print receipts and bills', 'Print orders', and 'Automatically print receipt', all of which are turned on. A 'PRINT TEST' button with a printer icon is highlighted with an orange border. At the bottom, there is a 'Printer groups' section with a toggle switch set to '1'.

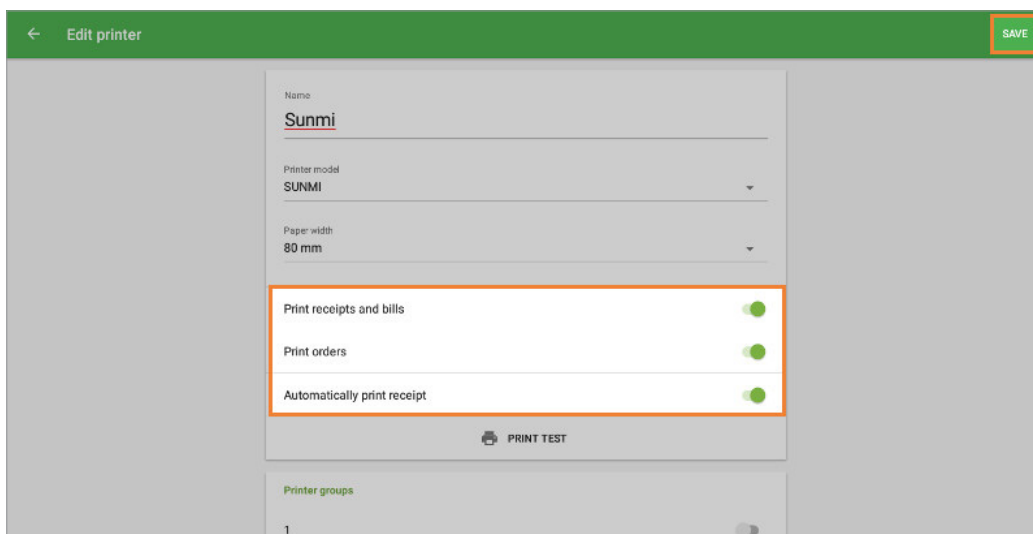
If a test receipt prints out successfully, then your printer is set up correctly.

5



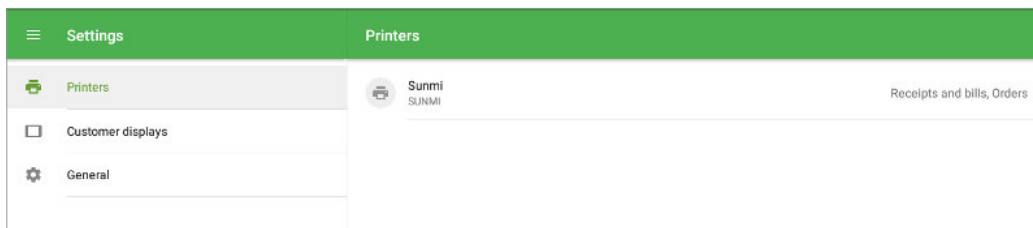
Choose the settings for your printer, depending on how you want to use it. Don't forget to save all of the settings at the end, by tapping on the 'Save' button.

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.



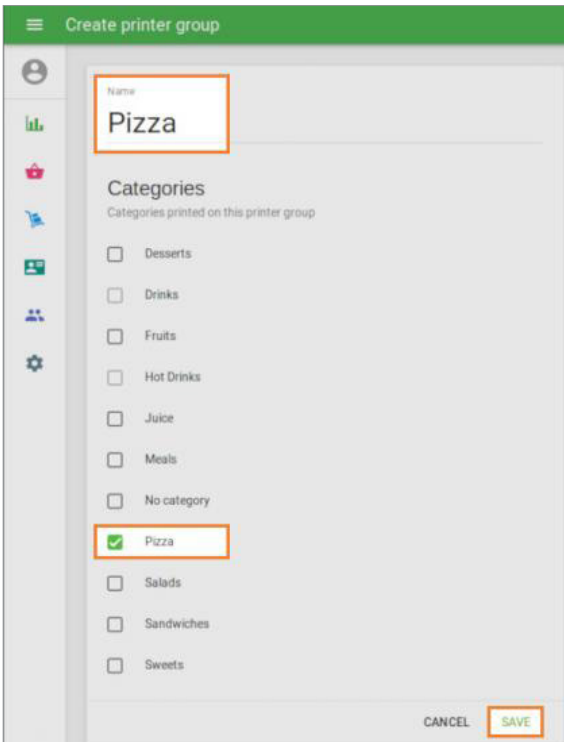
## 9.11 How to Set Up Kitchen Printer for Each Kitchen Station

---

**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](#)).

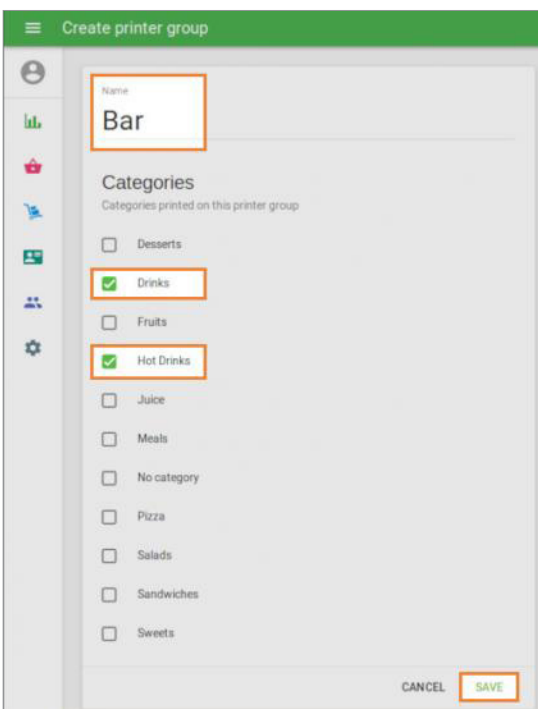
If you want to set up a separate kitchen printer for each kitchen station, create printer groups and assign categories to them in the Back Office.

1



The screenshot shows the 'Create printer group' interface. The 'Name' field contains 'Pizza'. The 'Categories' section lists various food categories with checkboxes. The 'Pizza' checkbox is checked. The 'SAVE' button is highlighted in orange.

2



The screenshot shows the 'Create printer group' interface. The 'Name' field contains 'Bar'. The 'Categories' section lists various food categories with checkboxes. The 'Drinks' and 'Hot Drinks' checkboxes are checked. The 'SAVE' button is highlighted in orange.

On the Loyverse POS app, assign each printer to its own printer group.

3

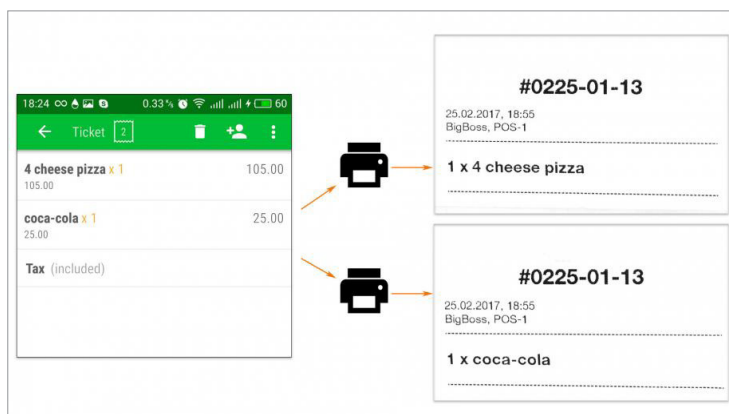
The screenshot shows the 'Edit printer' interface for a printer named 'Printer for pizza'. The printer model is 'Epson TM-m30 (Bluetooth)'. Under the 'Bluetooth printer' section, the same model is selected. There are two toggle switches: 'Print receipts and bills' (off) and 'Print orders' (on). A 'PRINT TEST' button is located below these toggles. In the 'Printer groups' section, the 'Pizza' group is selected and its toggle is on, while the 'Bar' group is off. A 'DELETE PRINTER' button is at the bottom.

4

The screenshot shows the 'Edit printer' interface for a printer named 'Printer for bar'. The printer model is 'Epson TM-m30 (Bluetooth)'. Under the 'Bluetooth printer' section, the same model is selected. There are two toggle switches: 'Print receipts and bills' (off) and 'Print orders' (on). A 'PRINT TEST' button is located below these toggles. In the 'Printer groups' section, the 'Bar' group is selected and its toggle is on, while the 'Pizza' group is off. A 'DELETE PRINTER' button is at the bottom.

Now, when a customer orders, two kitchen printers produce tickets with the list of items from their categories.

5

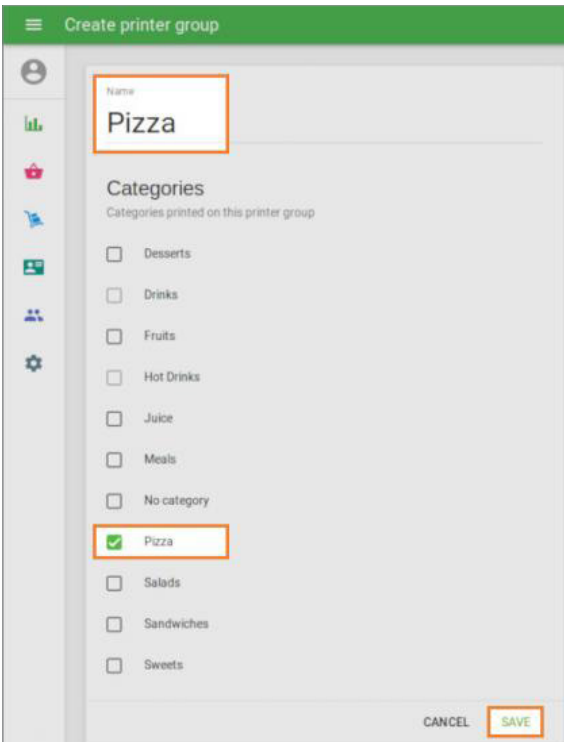


## 9.12 How to Set Up Multiple Kitchen Stations to Share One Printer

**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



Create printer group

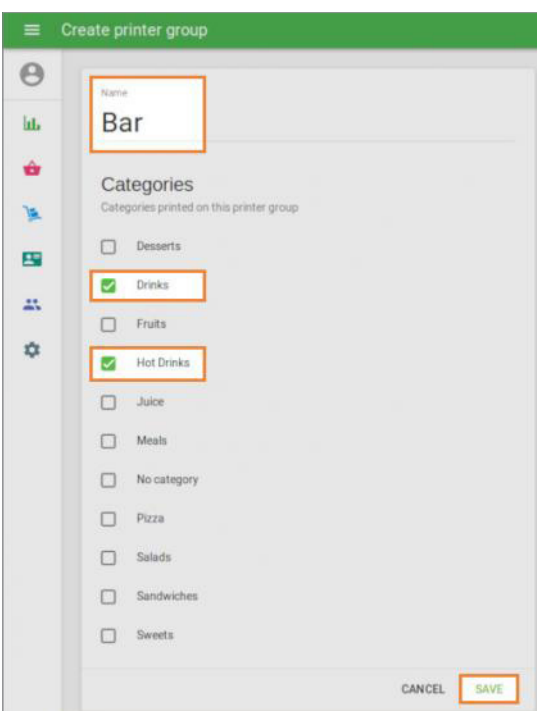
Name  
Pizza

Categories  
Categories printed on this printer group

- ☐ Desserts
- ☐ Drinks
- ☐ Fruits
- ☐ Hot Drinks
- ☐ Juice
- ☐ Meals
- ☐ No category
- ☒ Pizza
- ☐ Salads
- ☐ Sandwiches
- ☐ Sweets

CANCEL SAVE

2



Create printer group

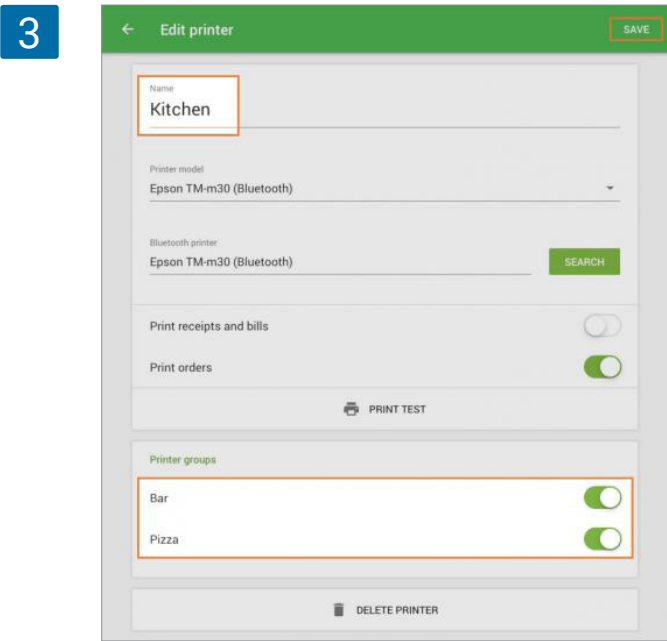
Name  
Bar

Categories  
Categories printed on this printer group

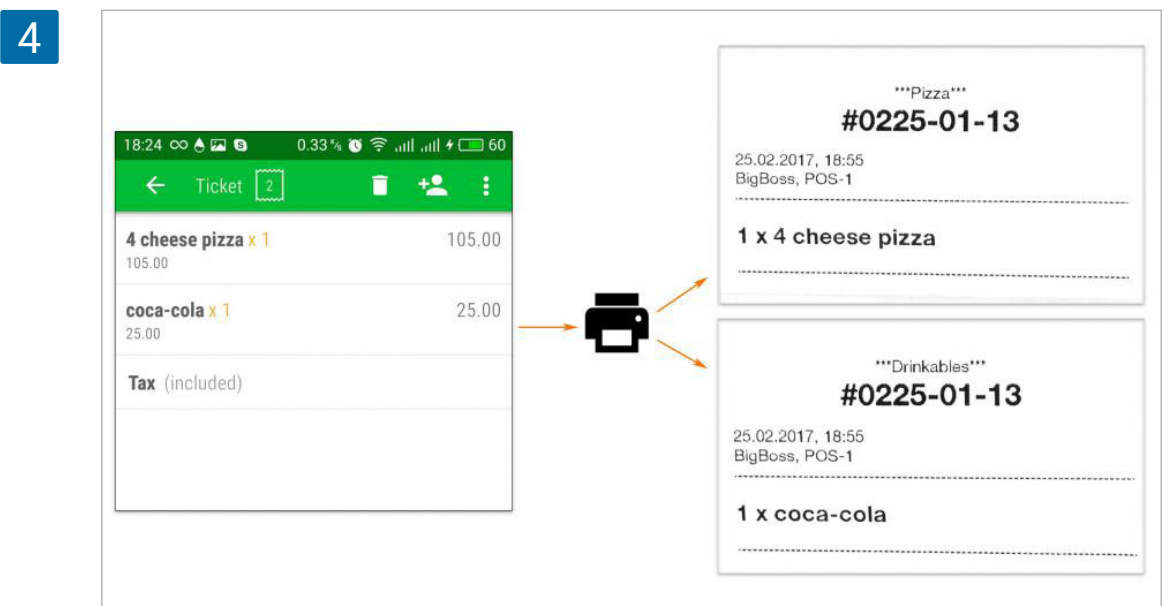
- ☐ Desserts
- ☒ Drinks
- ☐ Fruits
- ☒ Hot Drinks
- ☐ Juice
- ☐ Meals
- ☐ No category
- ☐ Pizza
- ☐ Salads
- ☐ Sandwiches
- ☐ Sweets

CANCEL SAVE

On the Loyverse POS app, assign each individual printer to both printer groups.



Now, when a customer orders, the kitchen printer will create two tickets for both kitchen stations with their own list of items.



## 9.13 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.

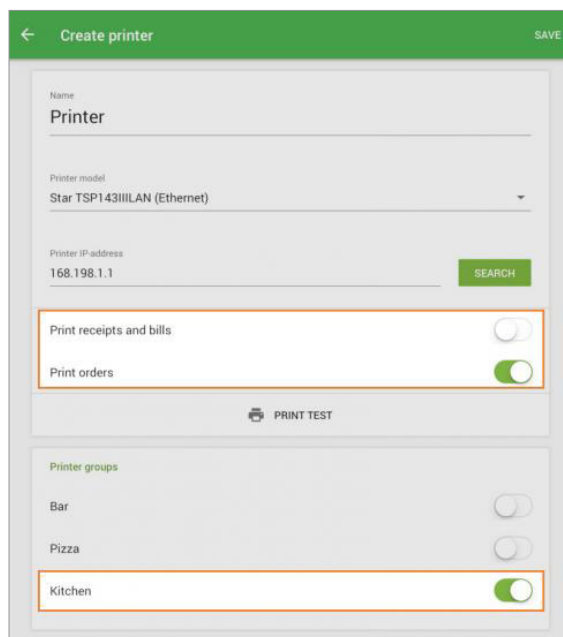
Before connecting a bell, make sure that your kitchen printer has been paired with Loyverse POS. Also in the Back Office settings, the 'Use Kitchen Printers' option has to be on, and the printer group has to be created with the associated categories of items.

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



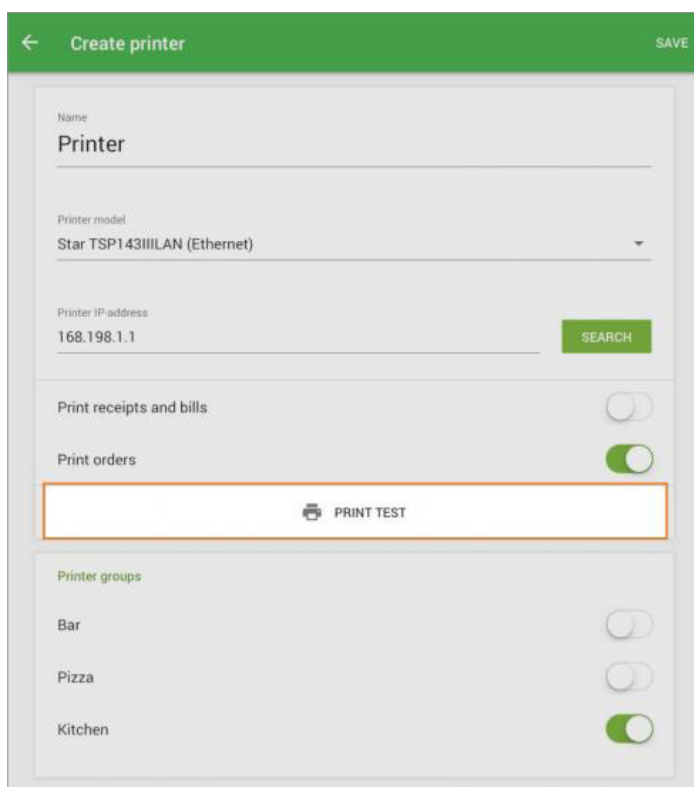
Plug the bell (buzzer) cable into the socket.

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.

## 9.14 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

## 9.15 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



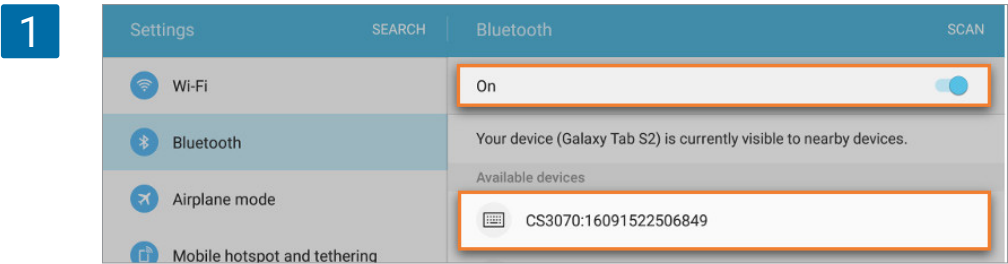
Now you can [add barcodes to your items](#) and [sell items with a barcode scanner](#).

# 9.16 How to Setup Motorola CS3070 (Bluetooth) Barcode Scanner

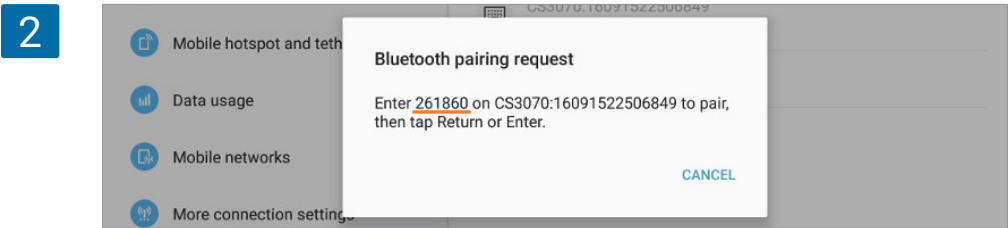
Press the scan button (+) to wake the scanner.

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.

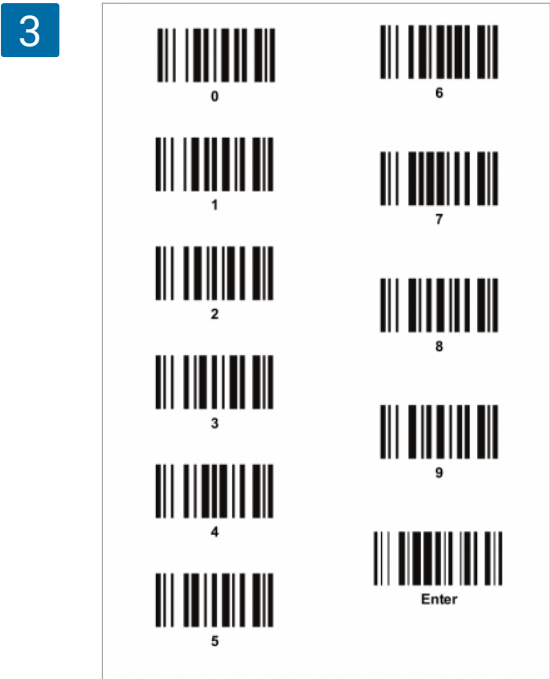
On your mobile device, turn on Bluetooth and let it search for devices. You will see your scanner in the list.



Select the CS3070 from the discovered device list. The Bluetooth application will prompt you to scan the pass key it generated.

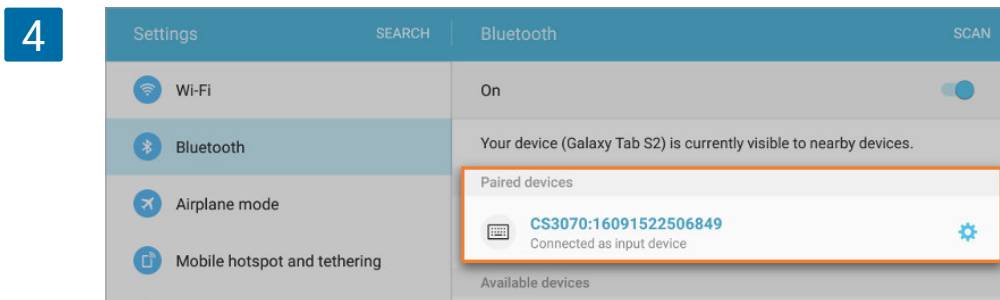


Scan Numeric Barcodes corresponding to the pass key, one by one, then scan the Enter code.





The Bluetooth button blinks slowly to indicate that the scanner is paired with the host.



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.

## 9.17 Socket 7Qi/7Ci (Bluetooth) Barcode Scanner Setup

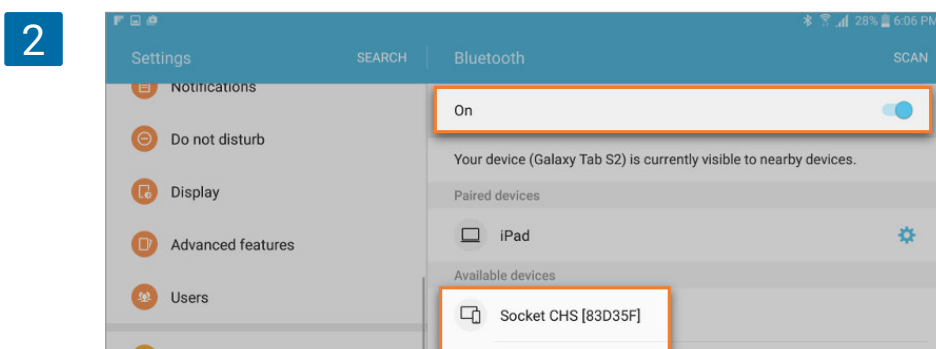
### 9.17.1 Connecting scanner to Android Mobile Device

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 scanning this barcode:



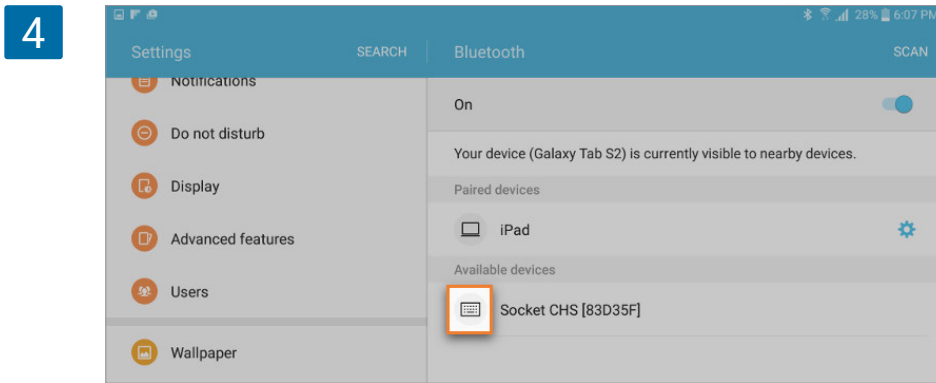
Turn Bluetooth on in your device. Go to Settings > Bluetooth. A Bluetooth Device search will begin.  
You will see your scanner in the list.



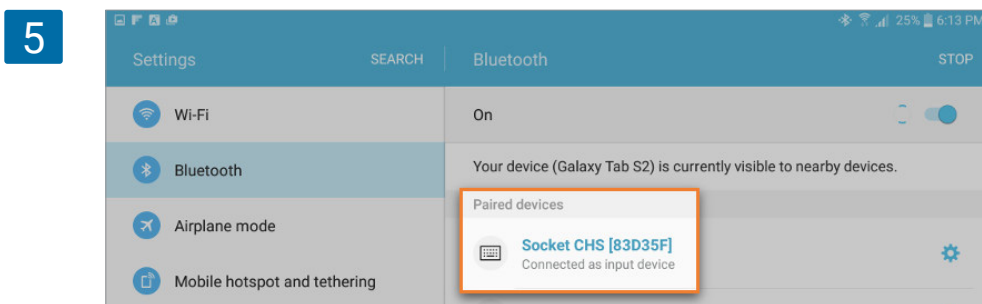
Configure the scanner to Human Interface Device (HID) Basic Mode, as Keyboard class device, by scanning this barcode:



The scanner icon will be changed to the keyboard.



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.



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.

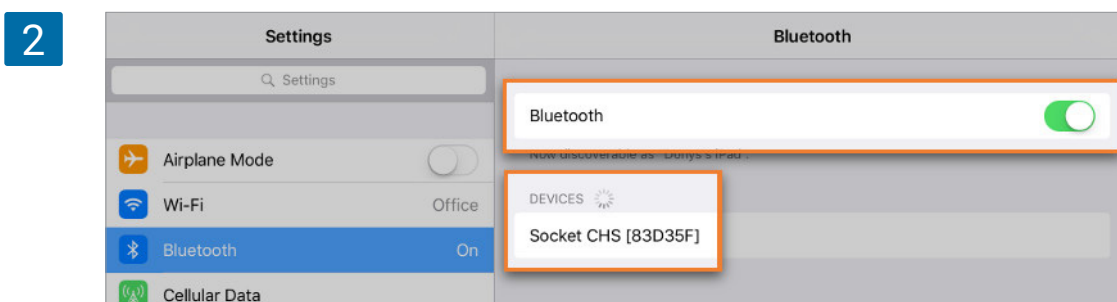
## 9.17.2 Connecting scanner to Apple iOS device

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:



Turn on Bluetooth on the Apple device. Go to Settings > Bluetooth. The bluetooth device search will begin.



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 bar-code, this item will be added to the ticket.

## 9.18 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.

## 9.19 How to Connect a Cash Drawer

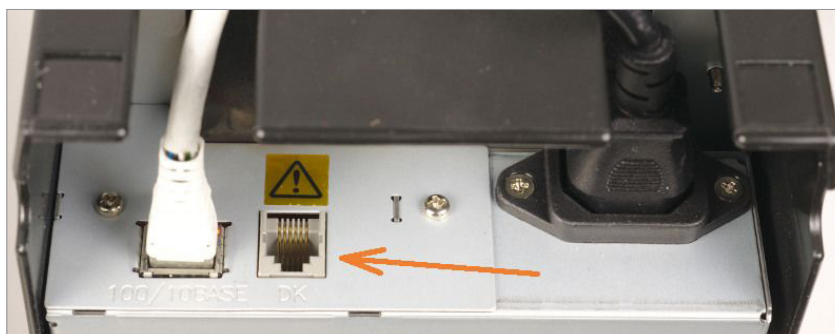
A cash drawer connects to your receipt printer, and is triggered to open automatically when you finish a cash sale.

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:

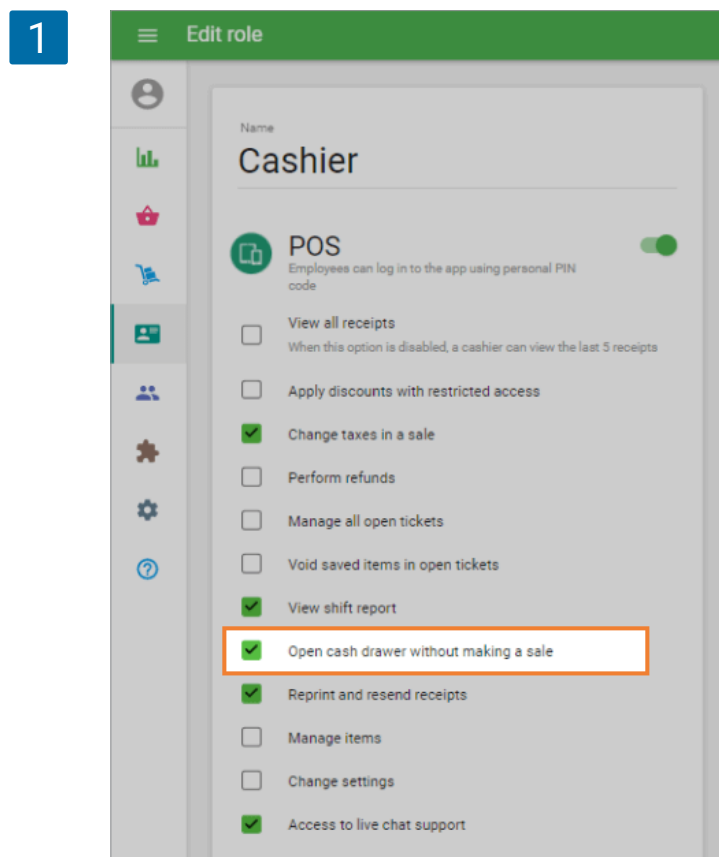
- A refund receipt is printed for cash refunds only
- Opening shifts for employees to enter the initial cash amount
- Closing shifts for employees to calculate the final cash amount
- 'Pay In' and 'Pay Out' actions performed to put money into or take from the cash drawer
- Using the 'Print test' option 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.

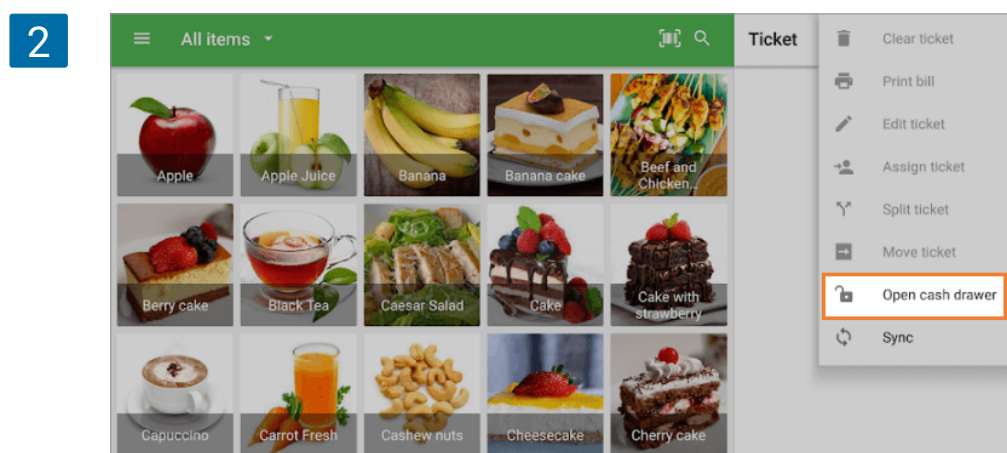
## 9.19.1 How to open cash drawer without making a sale

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.



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.



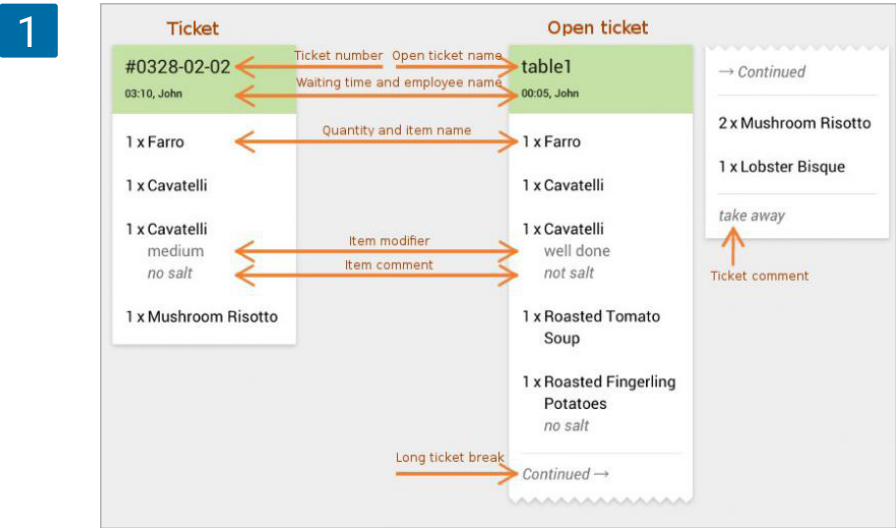
### Note

The button 'Open cash drawer' is displayed only if there is at least one printer connected with the option 'Print receipts and bills'.

# 9.20 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.

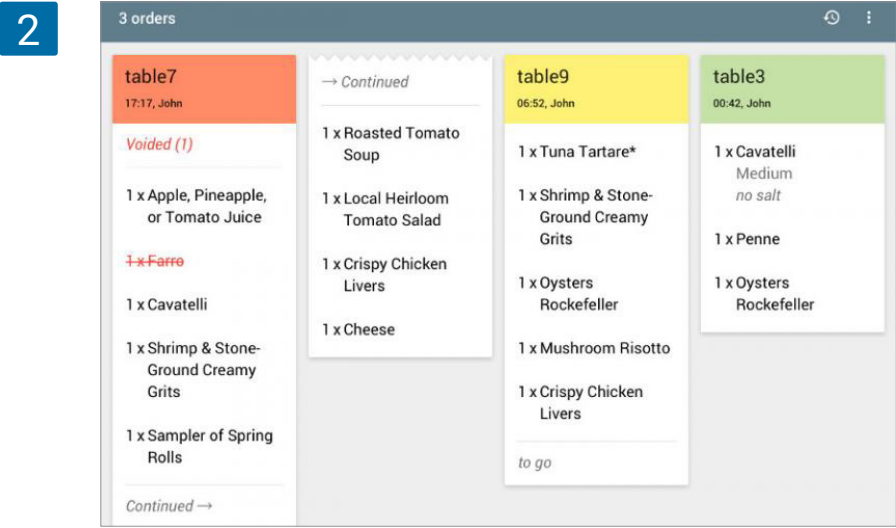
Now that you have Loyverse KDS set up, customer orders will appear on your kitchen display(s) as tickets with the list of items to prepare. The first line of a ticket header contains either ticket number or ticket name for saved open tickets. Then there is time since the order was created and server's name.



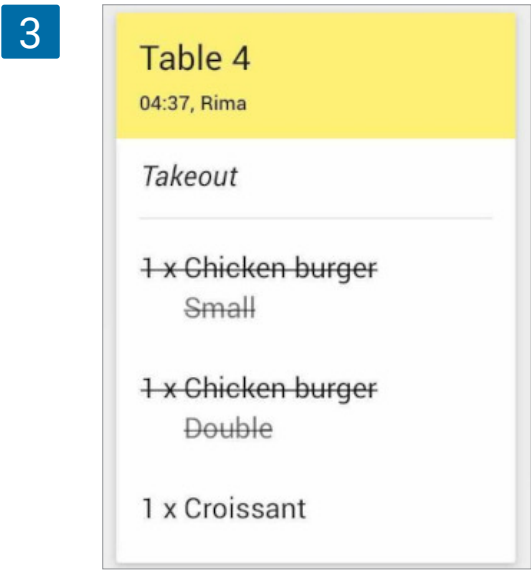
If there are item modifiers and/or comments, they will be listed just under the item name. The ticket comment is shown in the footer.

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.



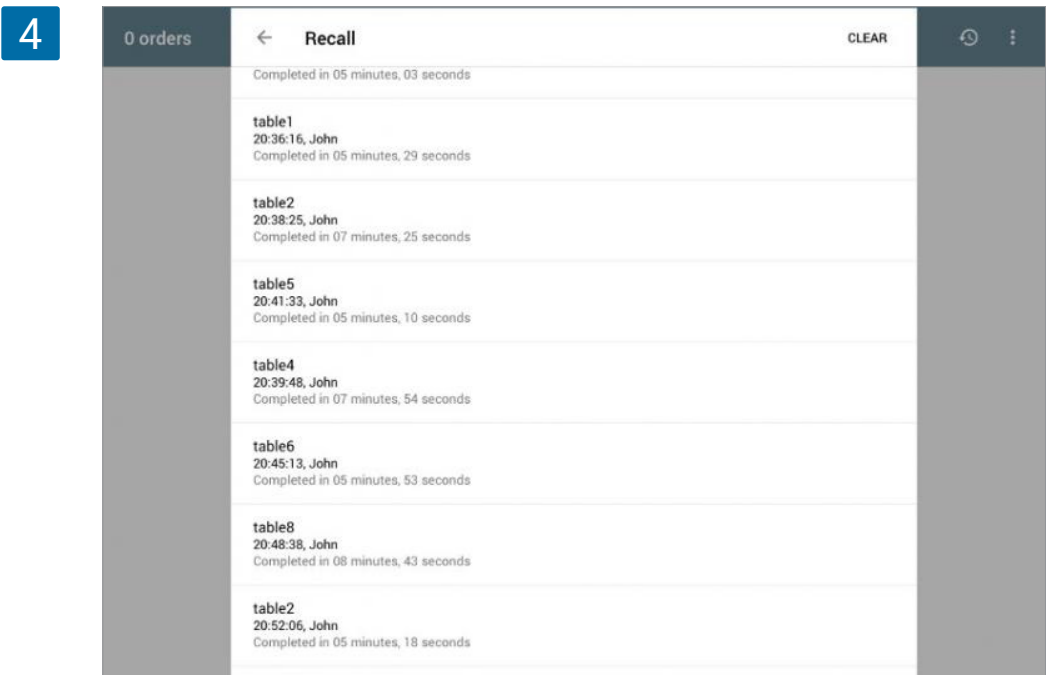
If you tick an item at the ticket, it will become strikethrough; you can use it to indicate that it is already cooked.



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'.





# 9.21 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!

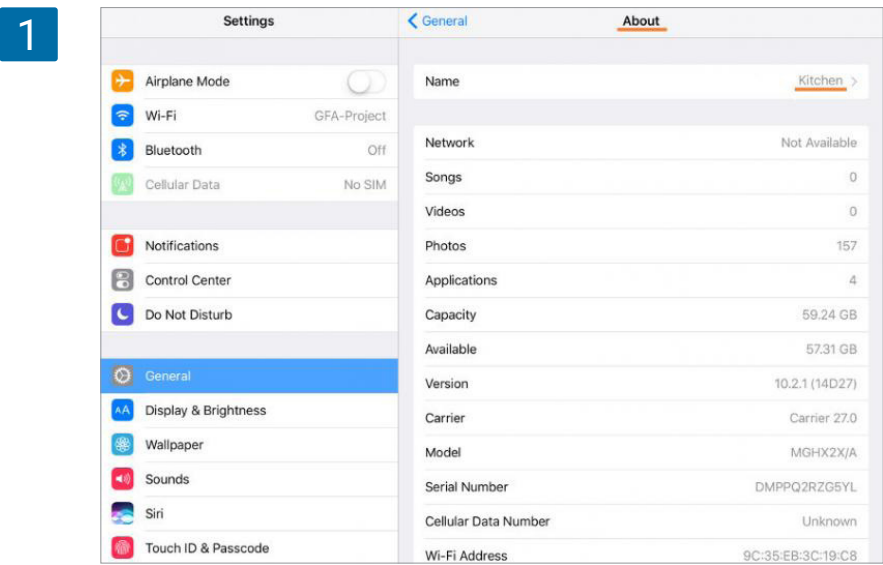
## 9.21.1 Install Loyverse KDS app

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.

## 9.21.2 Specify a device name

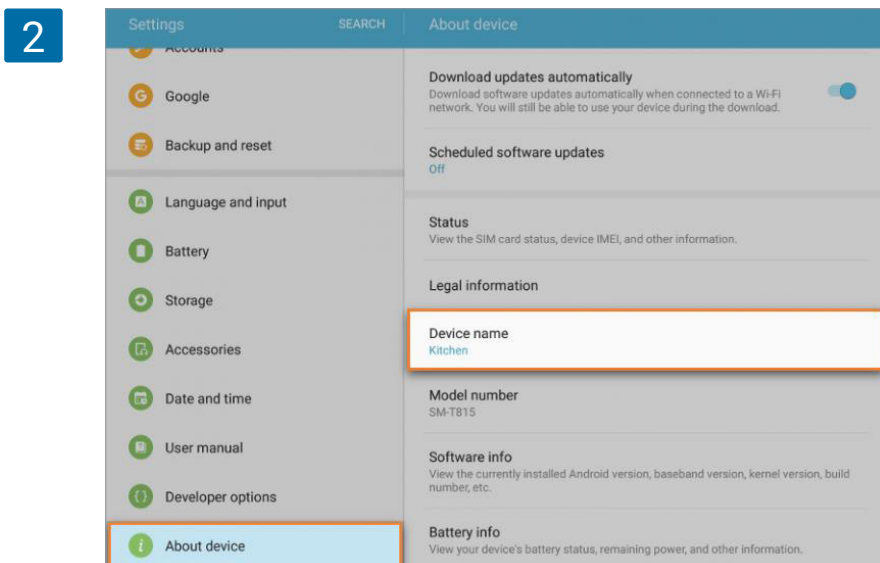
Your Loyverse KDS app will inherit the device name. The default device name is not very informative, thus it is recommended (but not mandatory) to give your device a name reflecting its location – Kitchen, Bar, etc.

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.



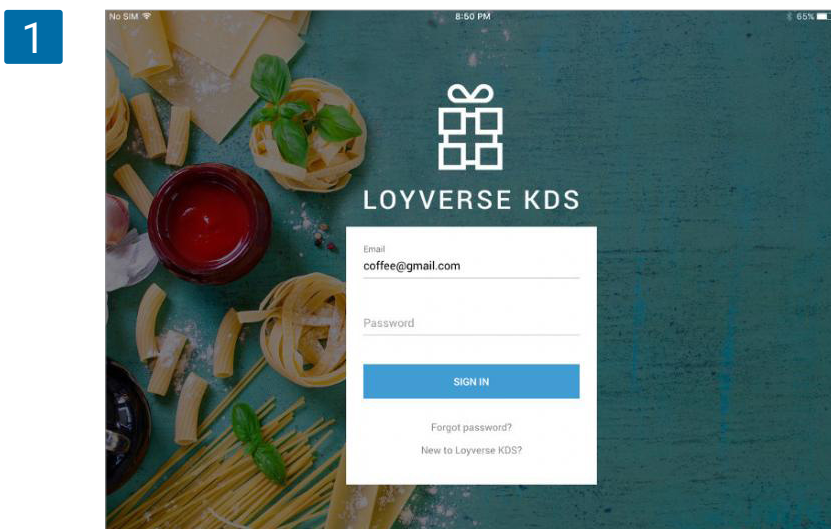


To configure a device name on an Android tablet, go to Settings > About device. On the next screen, tap Device Name, rename your device and tap OK.

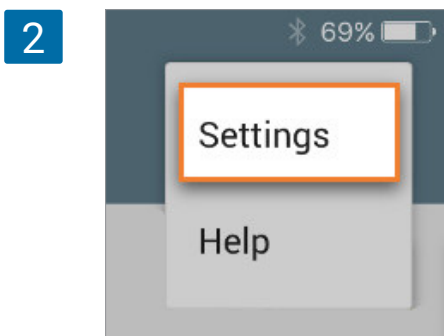


### 9.21.3 Configure Loyverse KDS app

Launch the app and log in with the same login and password as you use for Loyverse POS app.



Go to the menu at the right top corner (three dots) and tap Settings.



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.

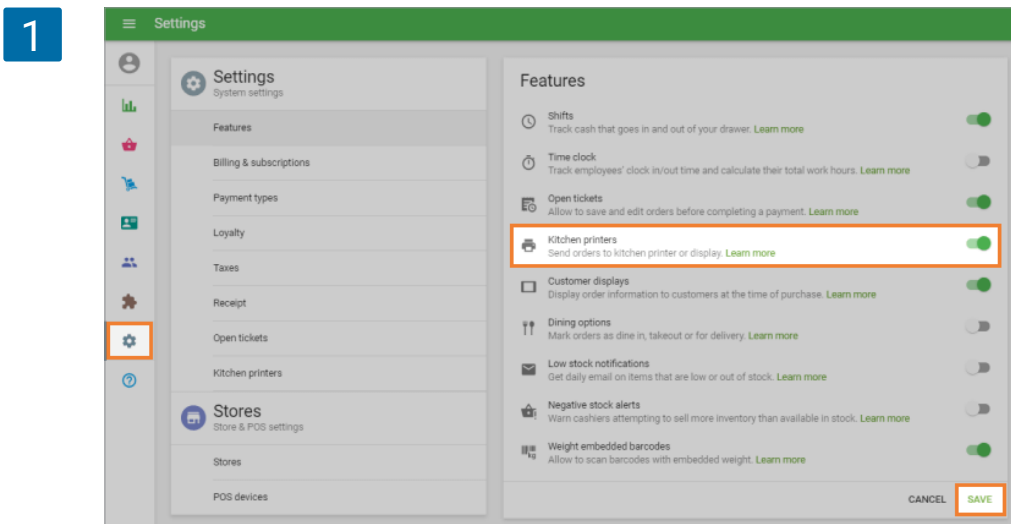
You will also want to adjust the time intervals after which the ticket headers will change its color to warning (yellow) and late (red). Default values are 4 minutes (240 seconds) and 7 minutes (420 seconds).



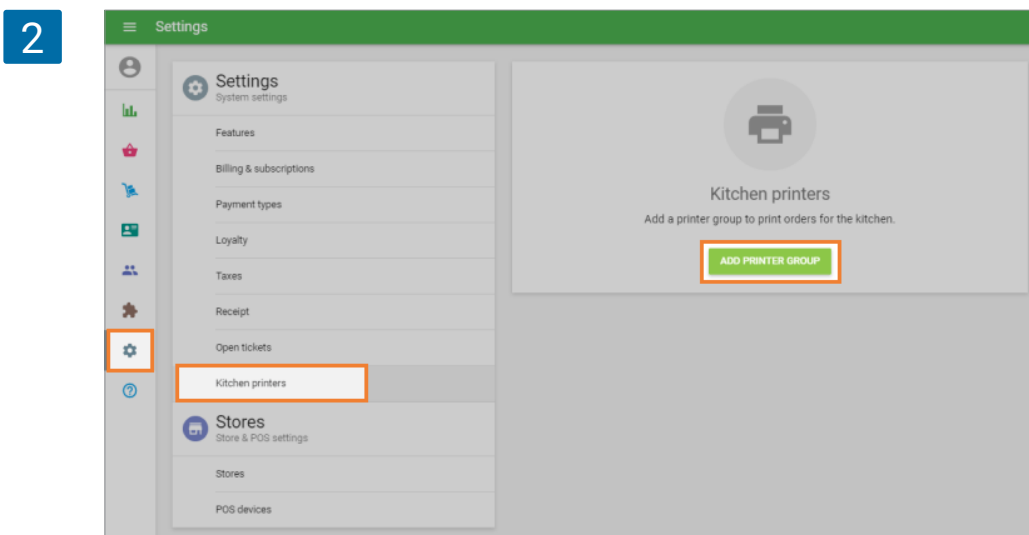
## 9.21.4 Create a printer group

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.

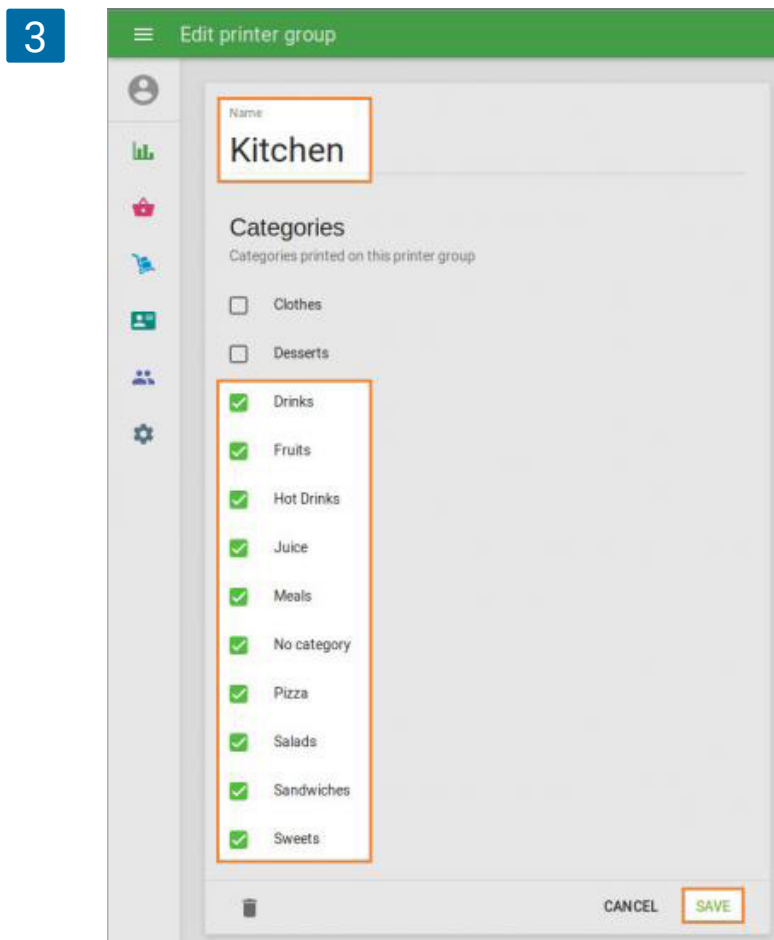
Log in to the Back Office, navigate to the Settings menu and switch on the "Kitchen Printers" slider in the "Features" section.



Click the "Kitchen Printers" menu and create a printer group.



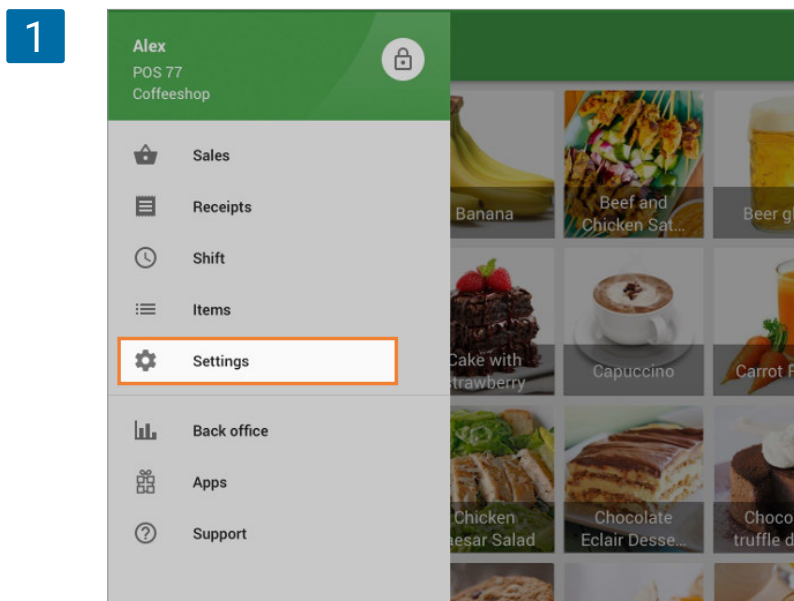
Give the printer group a name. Tick item categories that should be included in this printer group and save your selection.



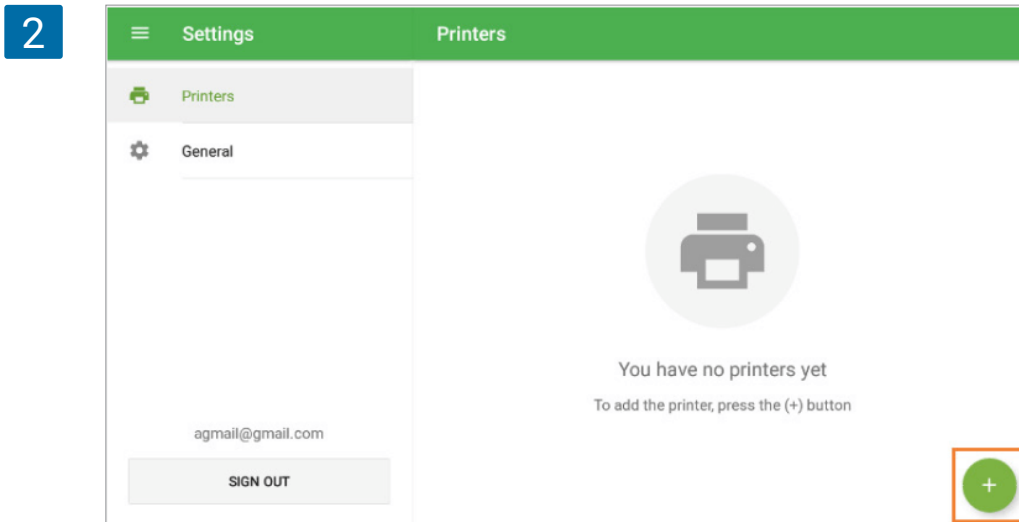
## 9.21.5 Pair kitchen display with Loyverse POS

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

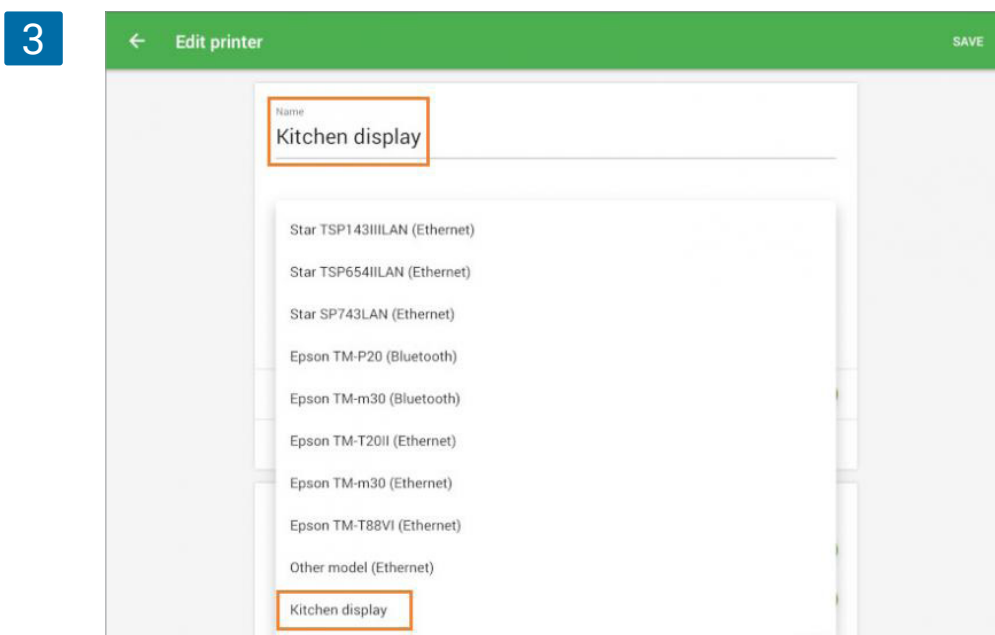
Then launch Loyverse POS and go to Settings > Printers.



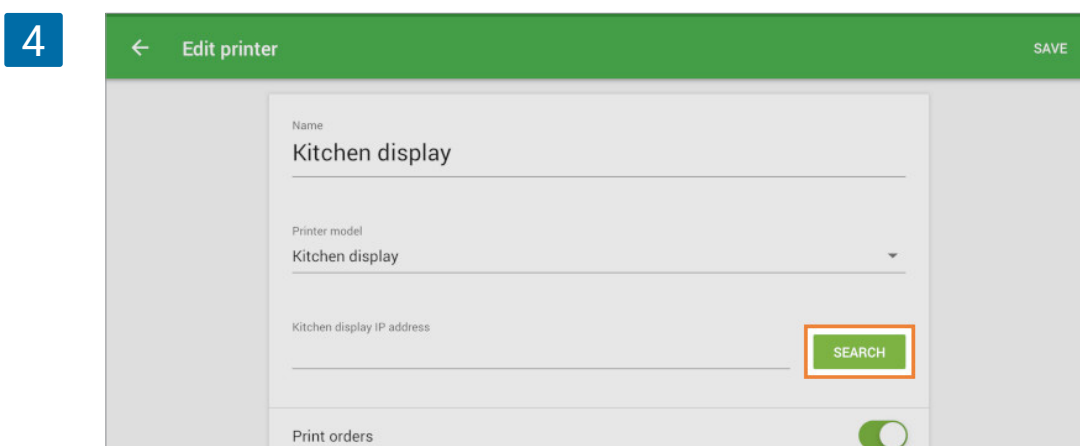
Tap the '+' button to add a kitchen display as a printer.



Enter your kitchen display name into the 'Printer name' field and select Kitchen Display from the drop-down menu.



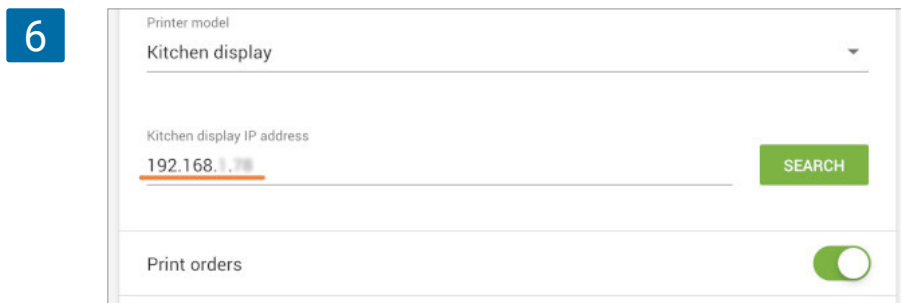
Tap the 'Search' button to search the network for available kitchen display devices.



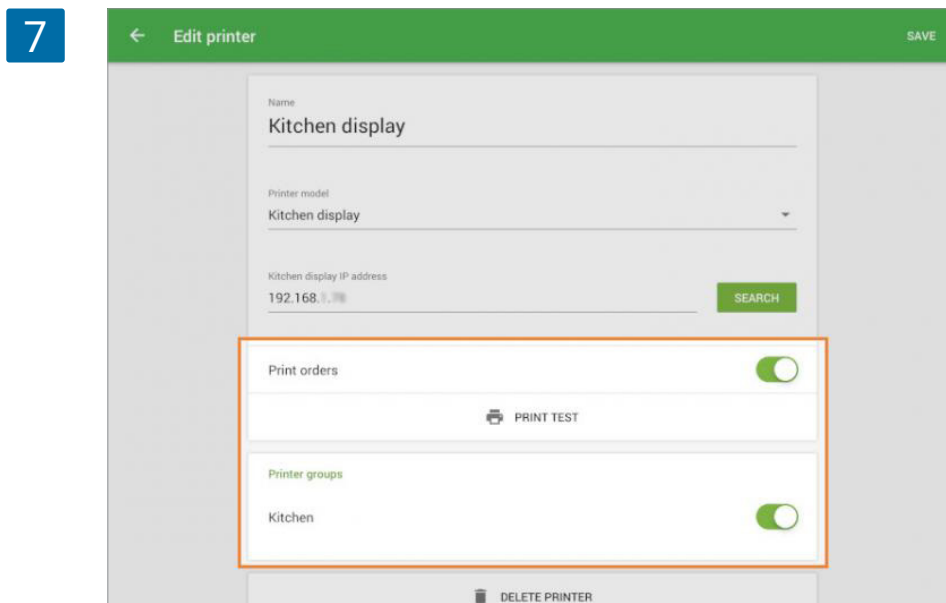
Select the appropriate kitchen display from the list of discovered devices and click OK.



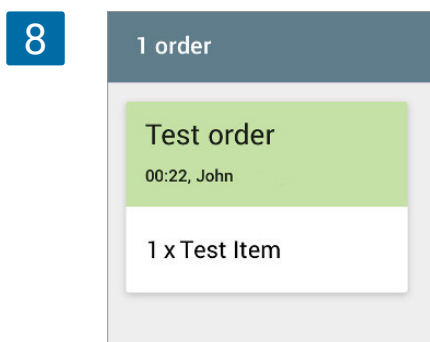
If automatic discovery fails, you can manually enter the IP address of the kitchen display device and proceed to the next step without tapping the 'Search' button.



Then switch 'Print orders' on, select a printer group and tap the 'Print test' button.



If you see a test order appear on the kitchen display, you have configured Loyverse KDS correctly.



Save your settings and enjoy!

If no test order appears, re-check the device network settings or chat with our support team.

## 9.22 Troubleshooting When Working with KDS

### 9.22.1 Separate Router

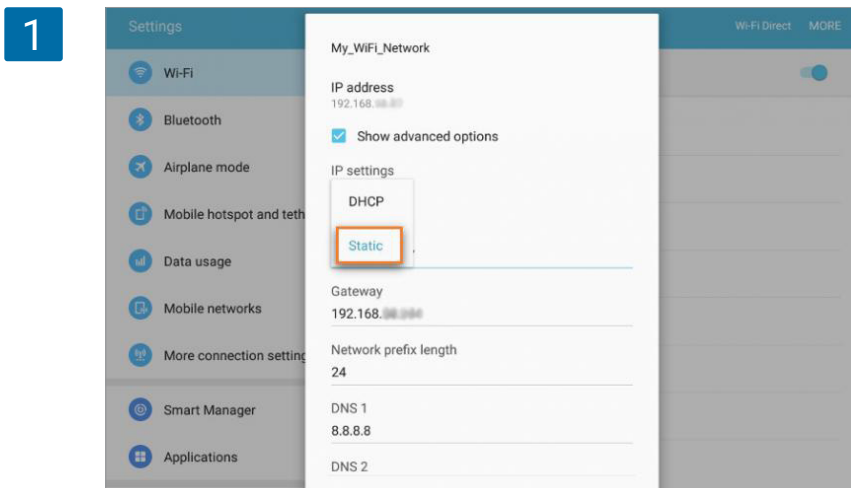
Often problems of losing the connection between Loyverse POS and KDS appear when there are many other Wi-Fi connections to the same Wi-Fi router.

**We recommend having separate router with Wi-Fi connection only to the mobile device with Loyverse POS App and mobile devices with [KDS App](#).**

### 9.22.2 Assign a static IP address to the kitchen display tablet

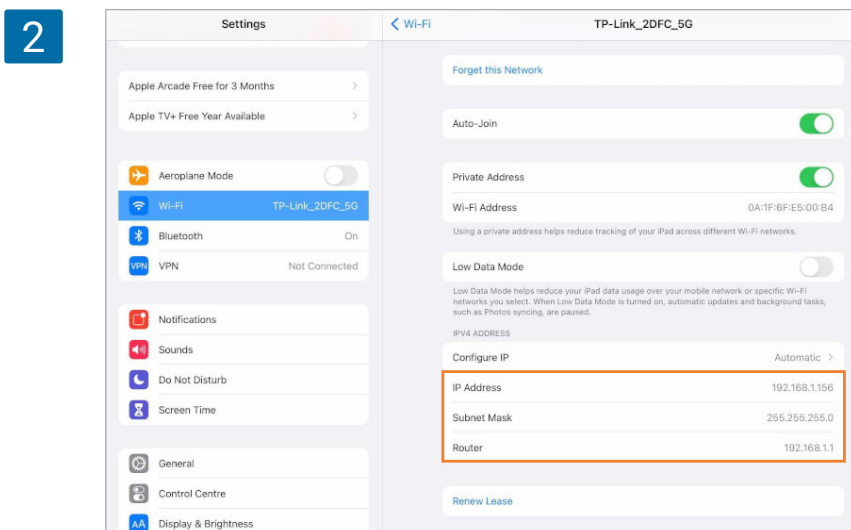
Connect your device to the same WiFi network as the device with Loyverse POS is connected to, and make sure the connection is working. Then change your network settings DHCP (automatic) to static (manual).

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'.



On an [iPad](#), go to Settings > Wi-Fi.

Write down the IP address, Subnet mask, Router values that are in Automatic IP configuration mode.



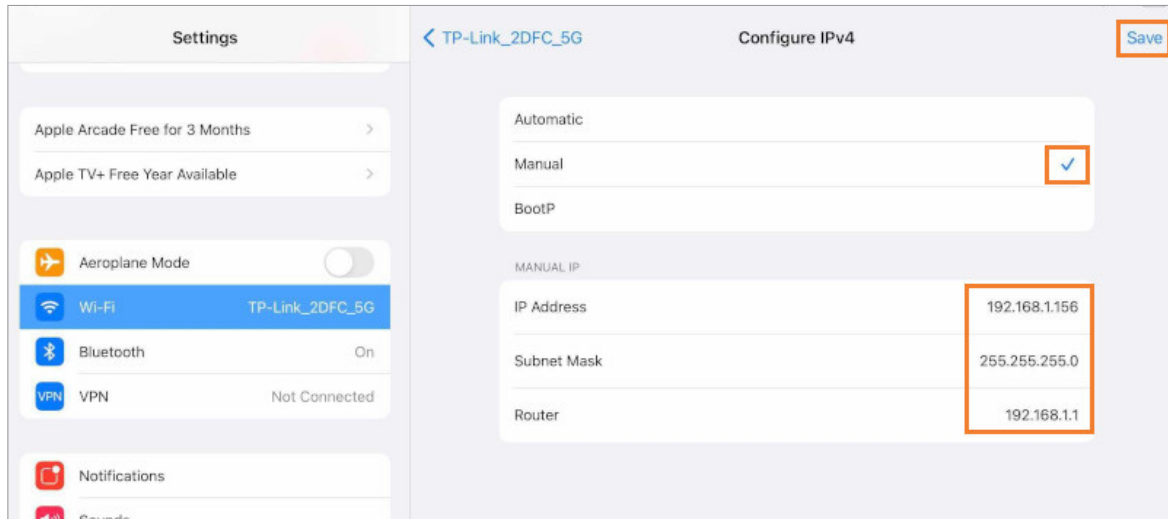
Then click on the Automatic button.

3



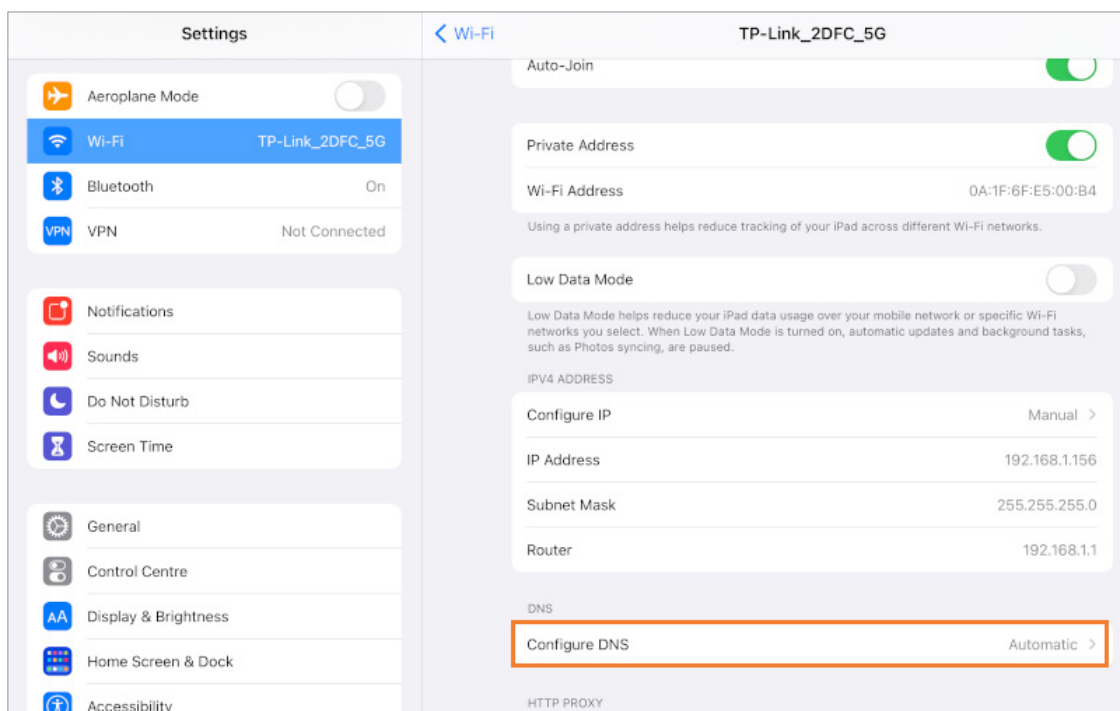
Switch the configuration mode to the Manual and enter values from Automatic IP configuration into respective fields. Then, tap the 'Save' button.

4

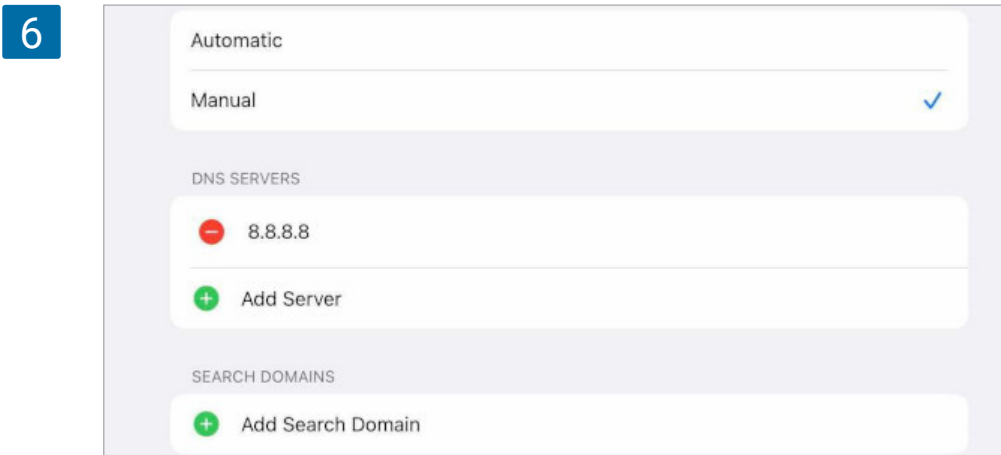


In the same way, switch the DNS settings from automatic to manual mode.

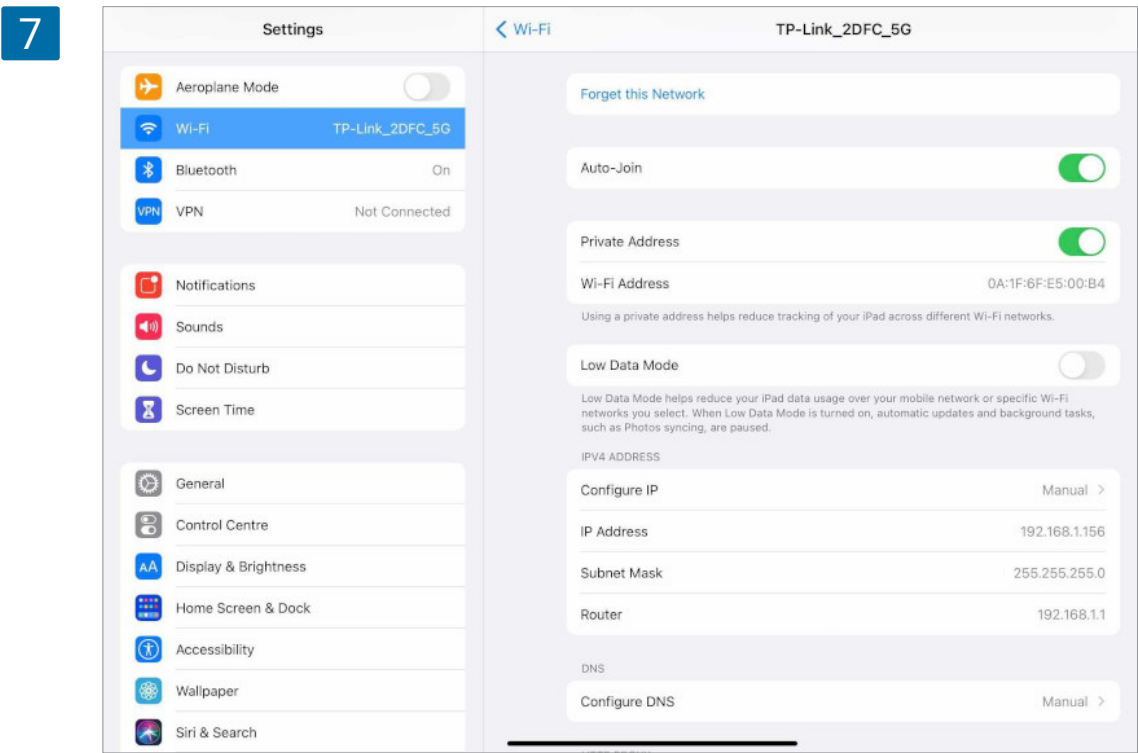
5



And add the DNS server value. For example, you can use the value 8.8.8.8 for Google OpenDNS.



Now you have set your iOS to work in the static IP address mode.





# 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

Ticket	
Dine in	
Carrot Fresh x 1	4.99
Cookies x 1	5.69
Fruit Salad x 1	8.49
Tax	1.68
<b>Total</b>	<b>20.85</b>

20.85  
Total amount due

Cash received  
20.85

CHARGE

25.00 30.00 40.00 50.00

CARD

The information about payment and card type will be shown on the receipt.

2

**The Coffee**  
21 Avenue, Brooklyn, New York, NY, United States

Order: #0303-01-05  
Cashier: Alex  
POS: POS 1

Carrot Fresh 4.99  
1 x 4.99

Cookies 5.69  
1 x 5.69

Fruit Salad 8.49  
1 x 8.49

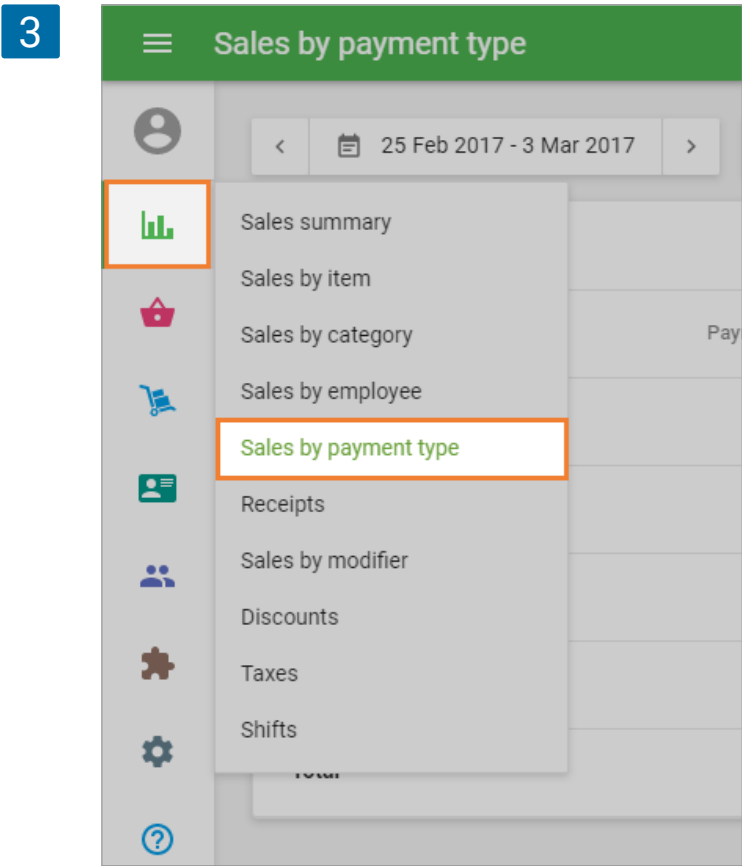
**Subtotal** 19.17  
Sales Tax 8.75% 1.68

**Total** **20.85**

Card 20.85

3.03.2017 13:35 #2078

In the back office in the 'Sales by Payment Type' menu, you can find the report about credit card sales.



4

The screenshot shows the 'Sales by payment type' report. The report displays a table with the following data:

Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	8	224.54	0	0.00	224.54
Cash	3	217.41	0	0.00	217.41
Cash rounding	3	0.41	0	0.00	0.41
Total	11	441.95	0	0.00	441.95

## 10.2 How to Accept Credit Cards with Loyverse POS and SumUp

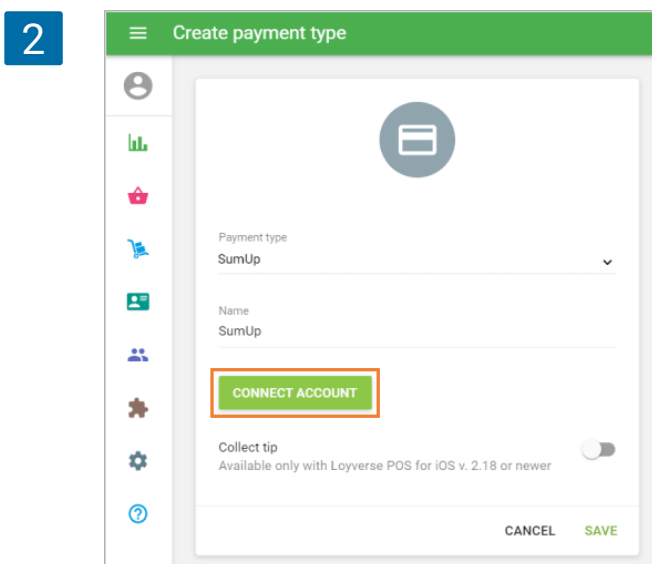
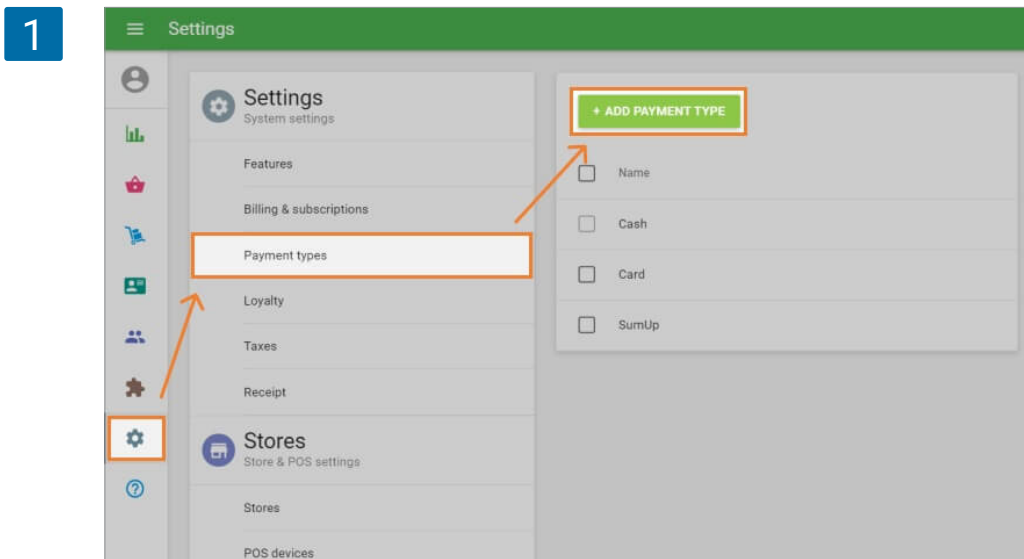
Loyverse POS merchants can accept credit card payments via [SumUp](#) and available to customers in 30+ countries: Austria, Belgium, Brazil, Bulgaria, Chile, Cyprus, Czech Republic, Denmark, Estonia, Finland, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Norway, Poland, Portugal, 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 SumUp Air 1E000 and SumUp Solo card readers.

### 10.2.1 Connecting Card Reader

#### 10.2.1.1 Creating a payment type

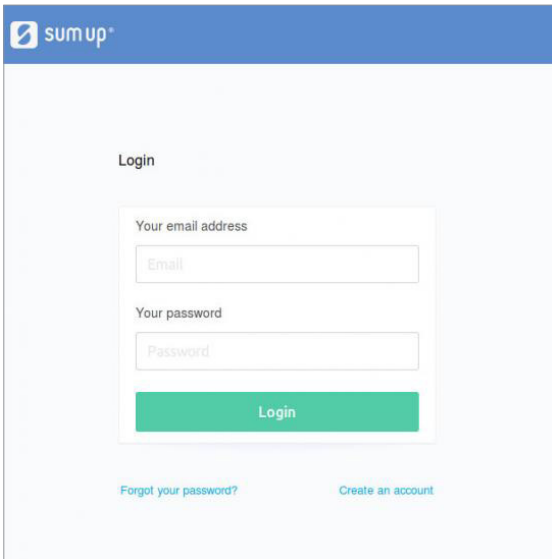
Log in to the Back Office, click the 'Settings' menu and then 'Payment types.' Click the 'Add payment type' button to add a new type of payment.



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](#).

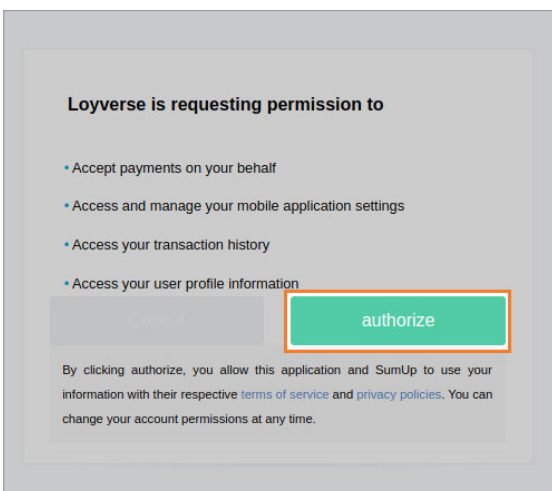
3



The image shows the SumUp login interface. At the top is the SumUp logo. Below it is the heading 'Login'. There are two input fields: 'Your email address' with a placeholder 'Email' and 'Your password' with a placeholder 'Password'. Below these fields is a green 'Login' button. At the bottom, there are two links: 'Forgot your password?' and 'Create an account'.

Accept permissions request by clicking on 'authorize' button.

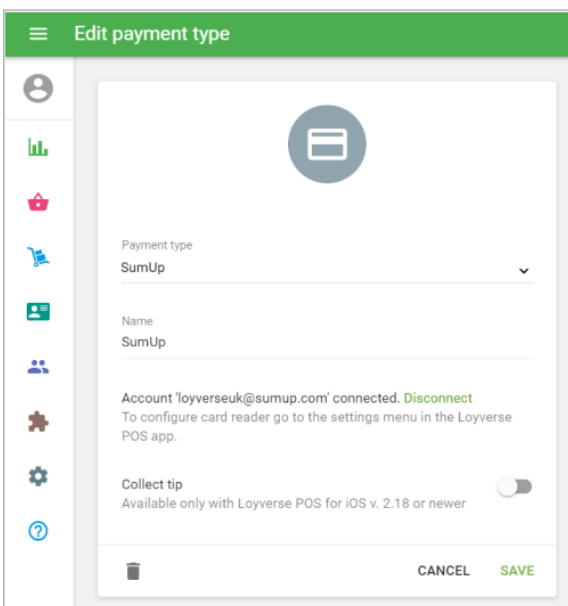
4



The image shows a permissions request screen. The heading is 'Loyverse is requesting permission to'. Below it is a list of permissions: 'Accept payments on your behalf', 'Access and manage your mobile application settings', 'Access your transaction history', and 'Access your user profile information'. There are two buttons: 'deny' and 'authorize'. The 'authorize' button is highlighted with an orange border. Below the buttons is a paragraph of text: 'By clicking authorize, you allow this application and SumUp to use your information with their respective [terms of service](#) and [privacy policies](#). You can change your account permissions at any time.'

You will see the connected account message, click 'Save' button.

5

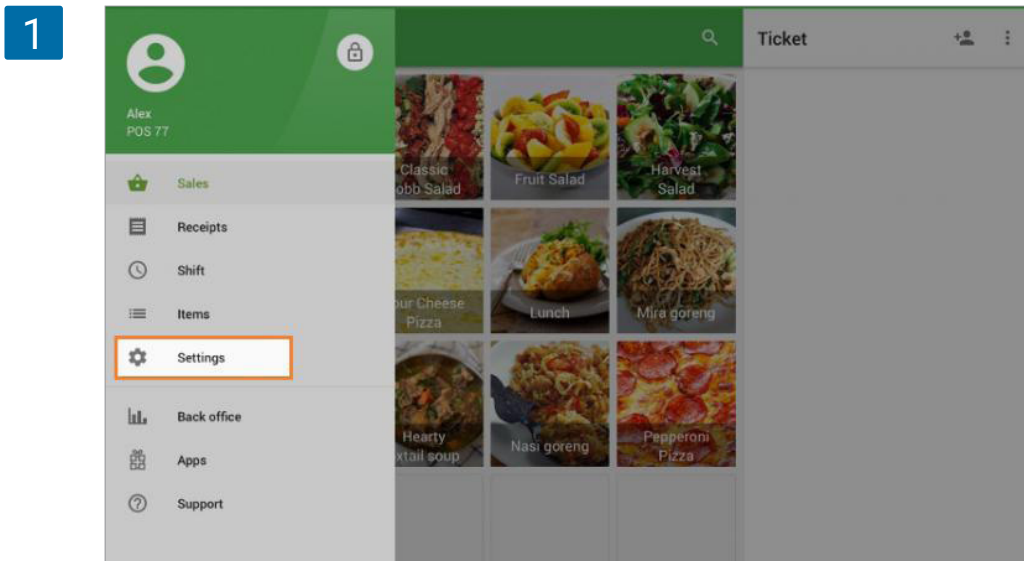


The image shows the 'Edit payment type' screen. At the top is a green header with the title 'Edit payment type'. Below it is a sidebar with various icons. The main content area shows a card reader icon. Below the icon is a dropdown menu for 'Payment type' with 'SumUp' selected. Below that is a text field for 'Name' with 'SumUp' entered. Below the text field is a message: 'Account "loyverseuk@sumup.com" connected. Disconnect'. Below the message is a note: 'To configure card reader go to the settings menu in the Loyverse POS app.' Below the note is a toggle switch for 'Collect tip' which is currently turned off. At the bottom are two buttons: 'CANCEL' and 'SAVE'.

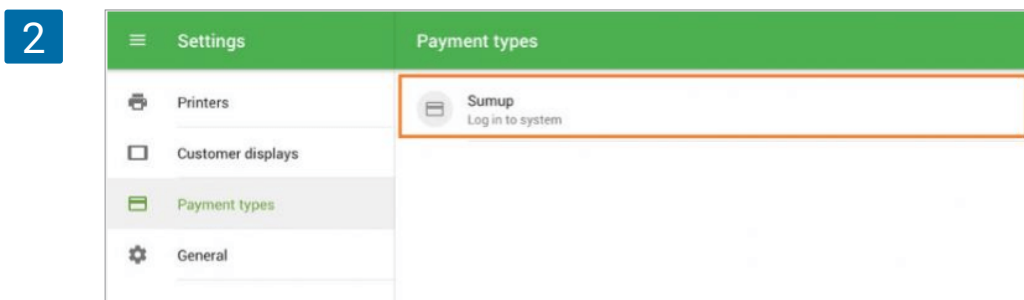
For the card reader SumUp Solo, remember to switch on the Bluetooth connection in the device settings.

## 10.2.1.2 Connecting with iOS devices

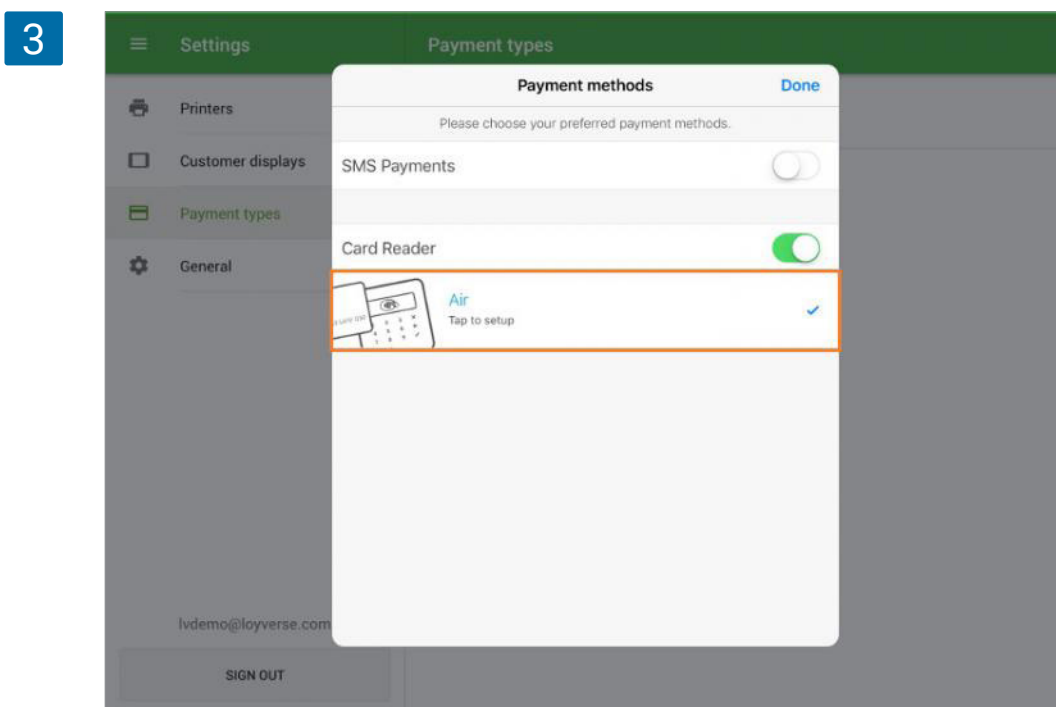
Then launch [Loyverse POS](#) and go to Settings > Payment Types.



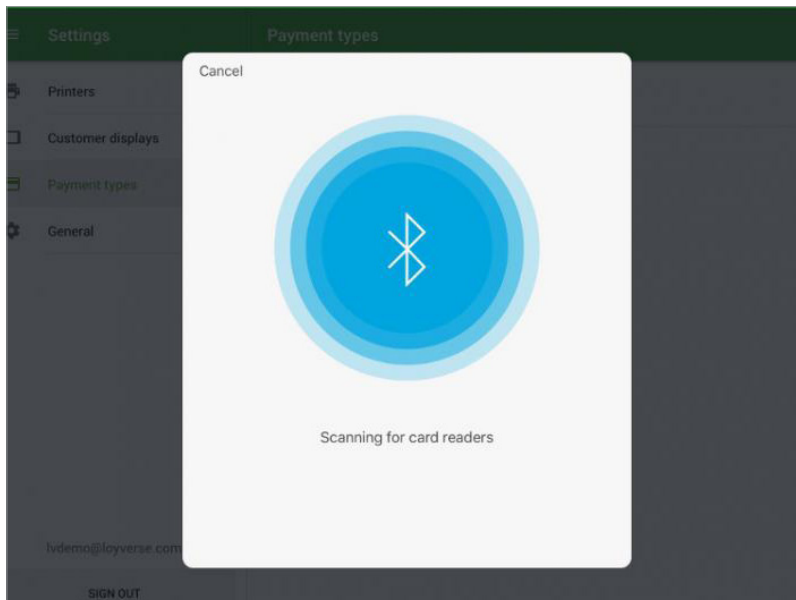
Tap the 'Sumup' button for account settings.



In the 'Payment methods' screen, select your card reader for set up.

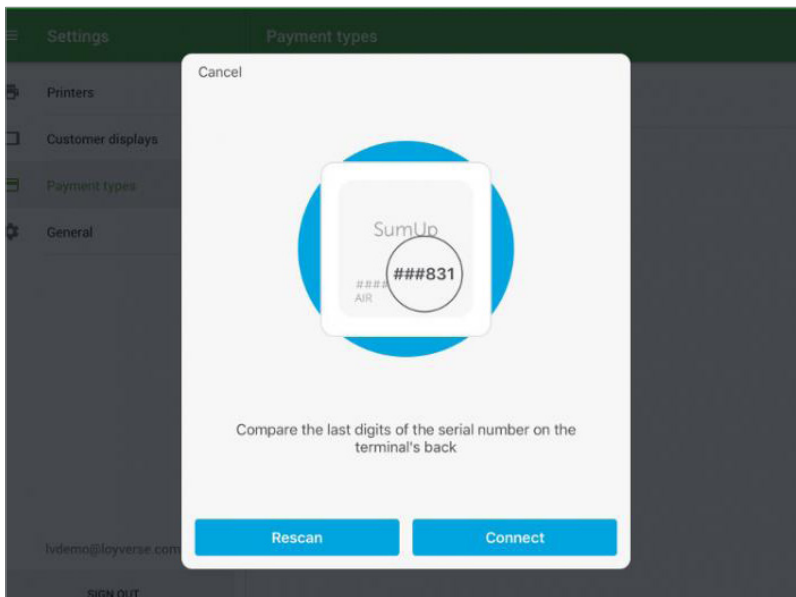


4



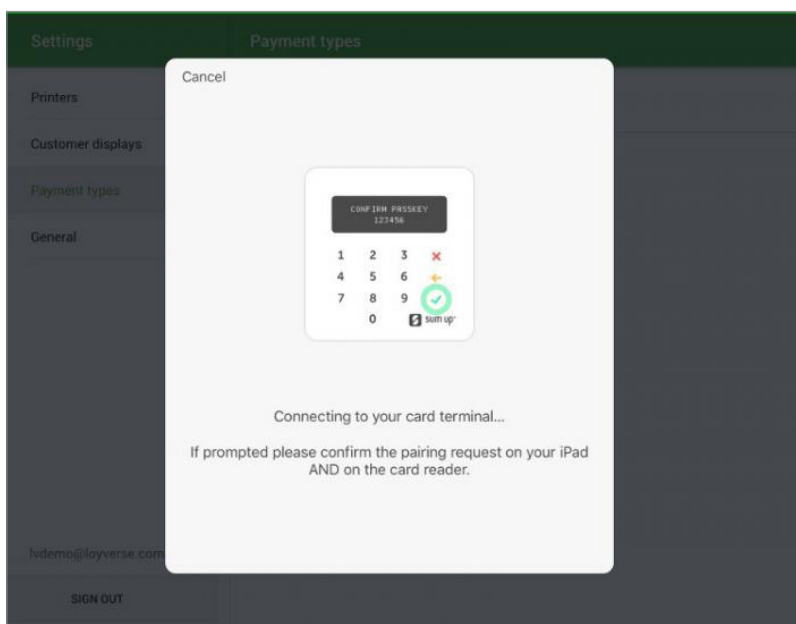
The application will start searching for SumUp card readers.

5



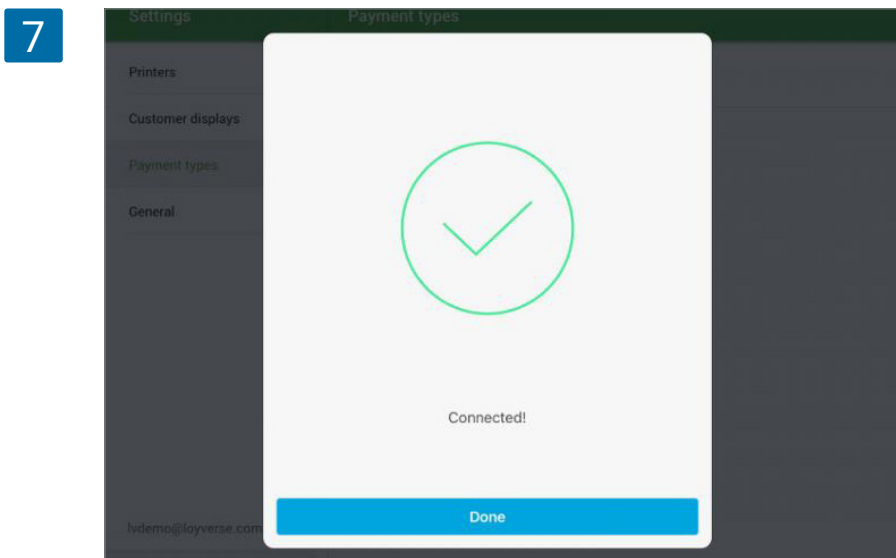
The application will show the last three digits of the found device. Tap 'Connect' button.

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.

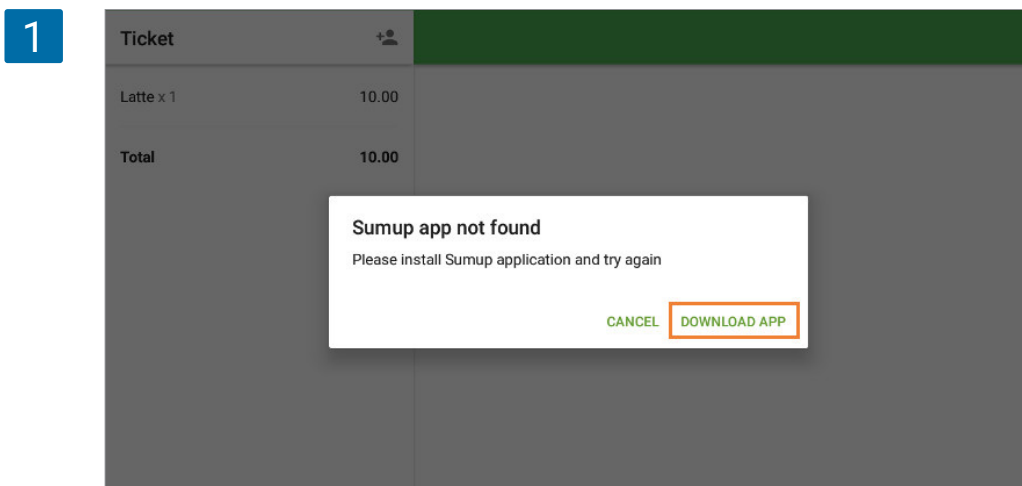


Now you are ready to accept card payments.

### 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.

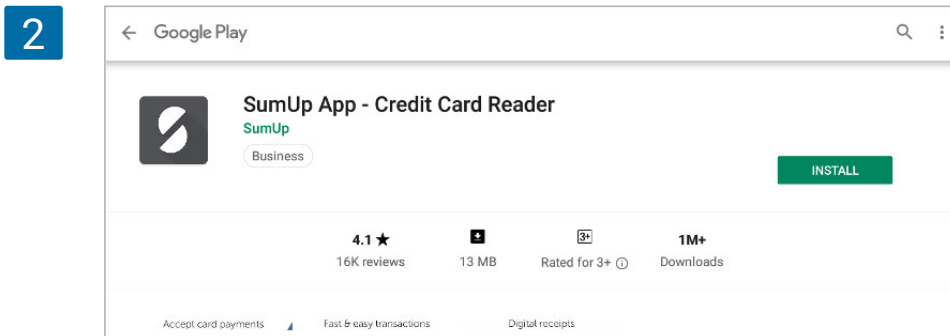
You will see an invitation to download the Sumup app. Tap 'Download app' button.



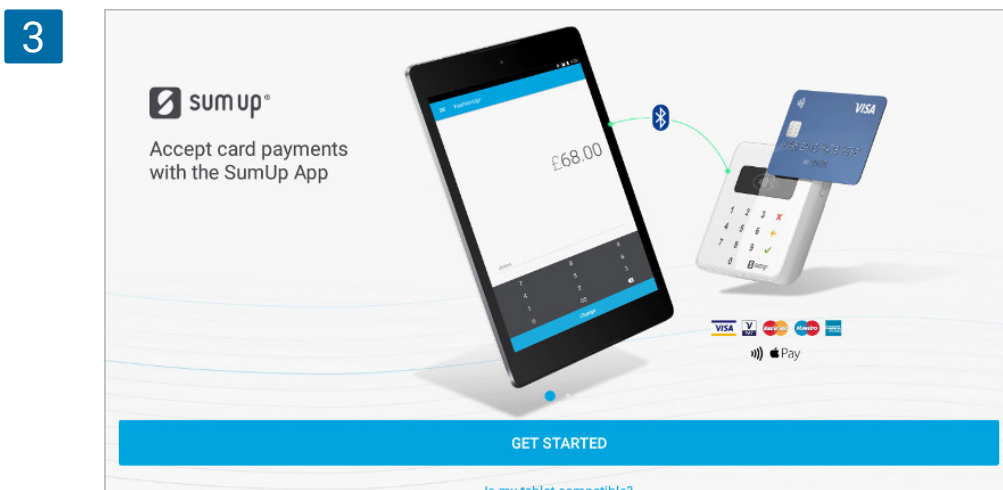
You will be redirected to [Google Play to SumUp app](#). Install the app to your device and launch it.

#### Note

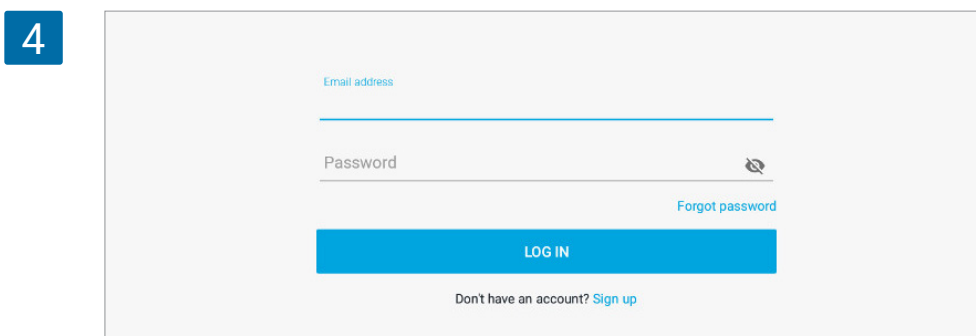
For using the SumUp App on Android devices, the required operating system is Android 6.0 or higher.



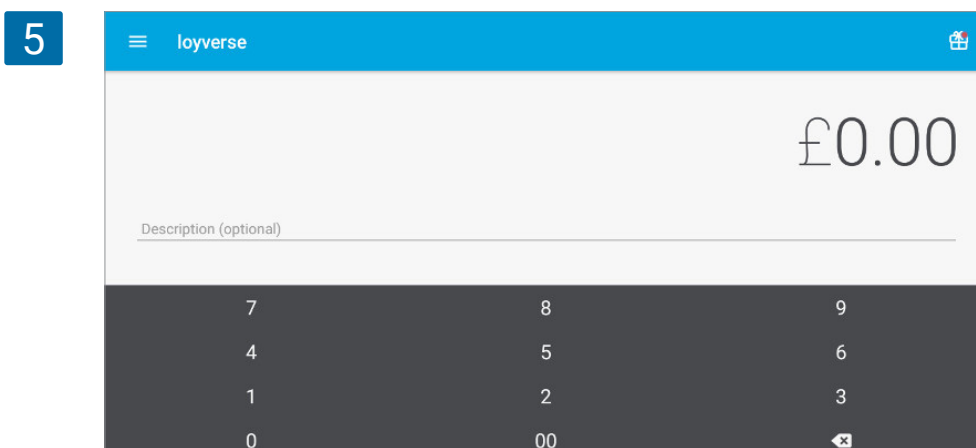
You will see the welcoming screen of SumUp app. Tap the 'Get Started' button.



Enter Email and Password from your SumUp account.



You will see an invitation to make payment through SumUp app.





Now you can close this app and go to accept payments through Loyverse POS.

#### Note

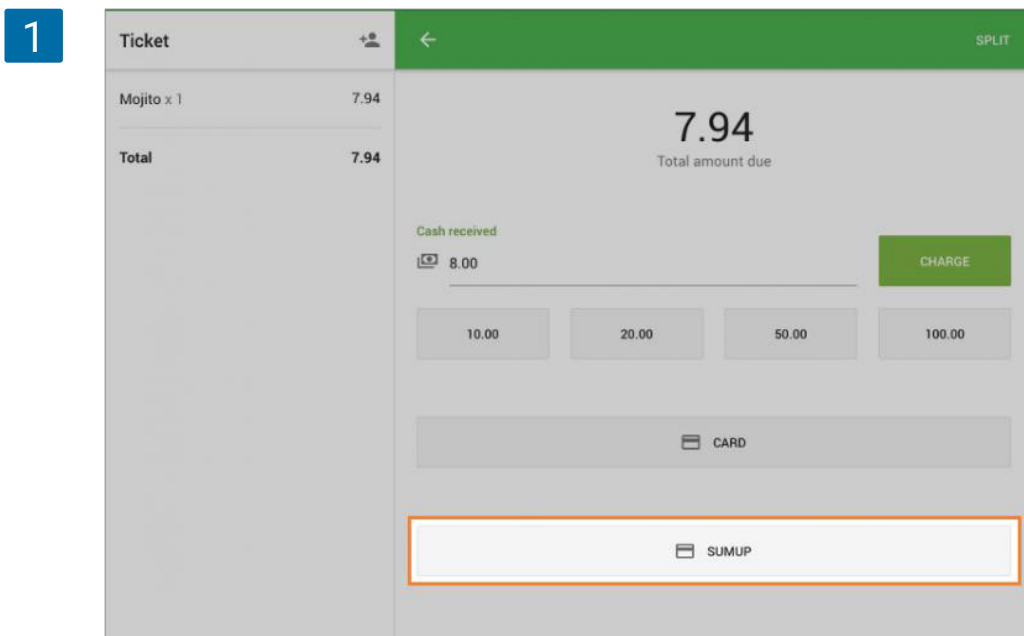
**SumUp works only with mobile devices which turned on geolocation.**

## 10.2.2 Processing Payments

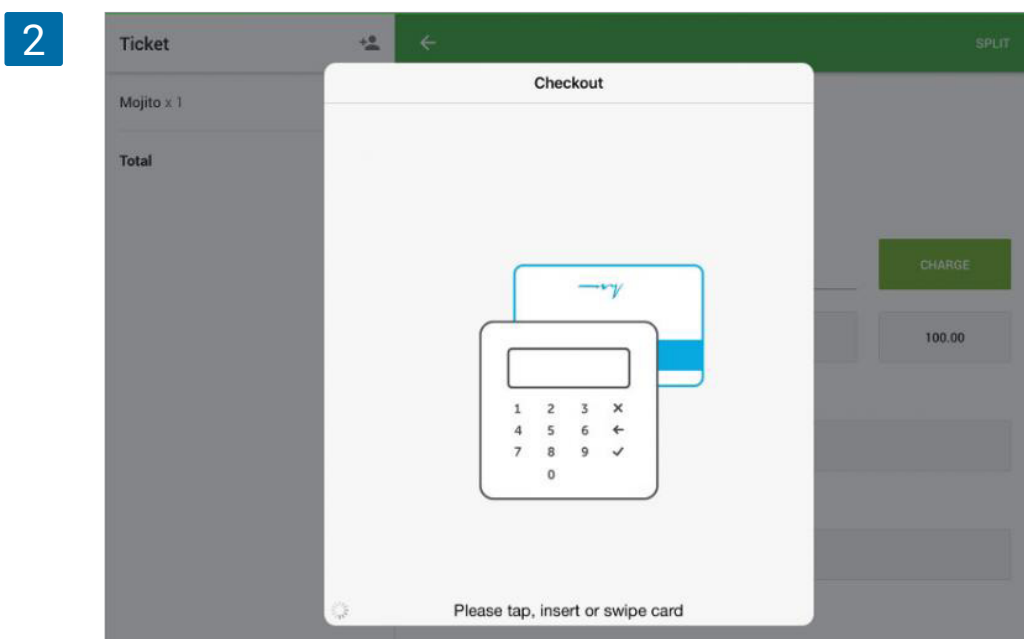
### 10.2.2.1 Payment

Add items to the ticket and press 'Charge.'

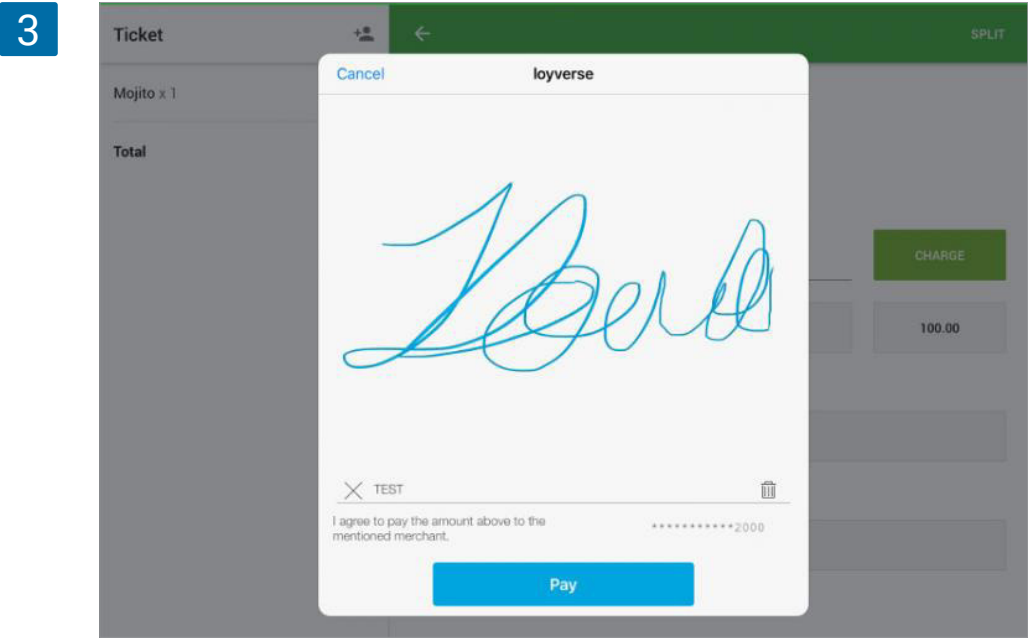
Select the SumUp payment type.



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.

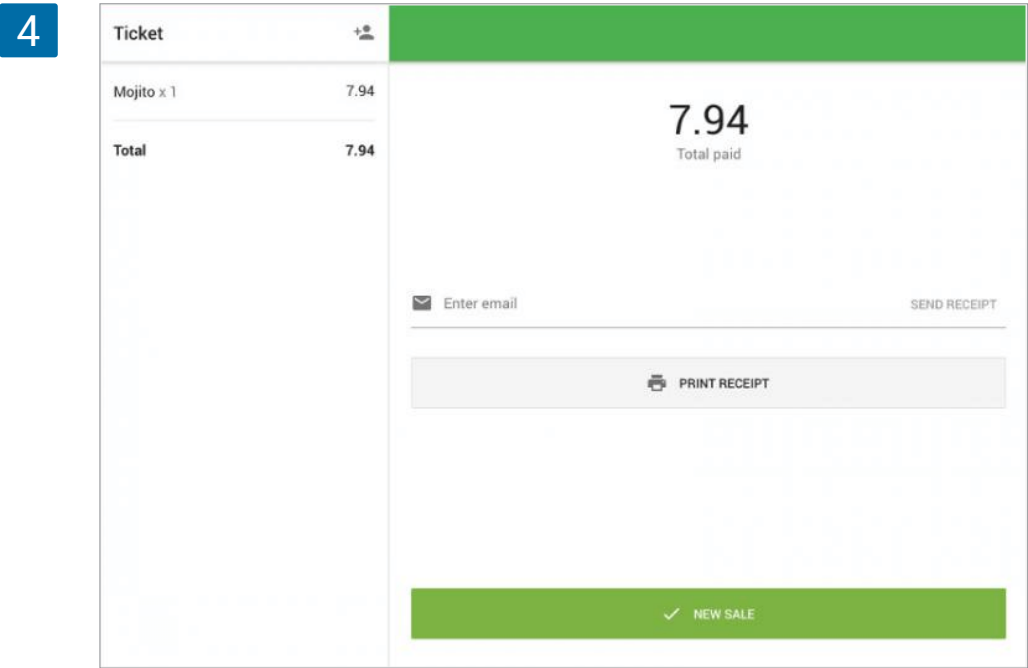


Tap, insert or swipe customer card on the card reader. If the card needs the pin entry, give card reader to a customer to do that. If a card needs a signature, let customer sign on the iPad's screen.

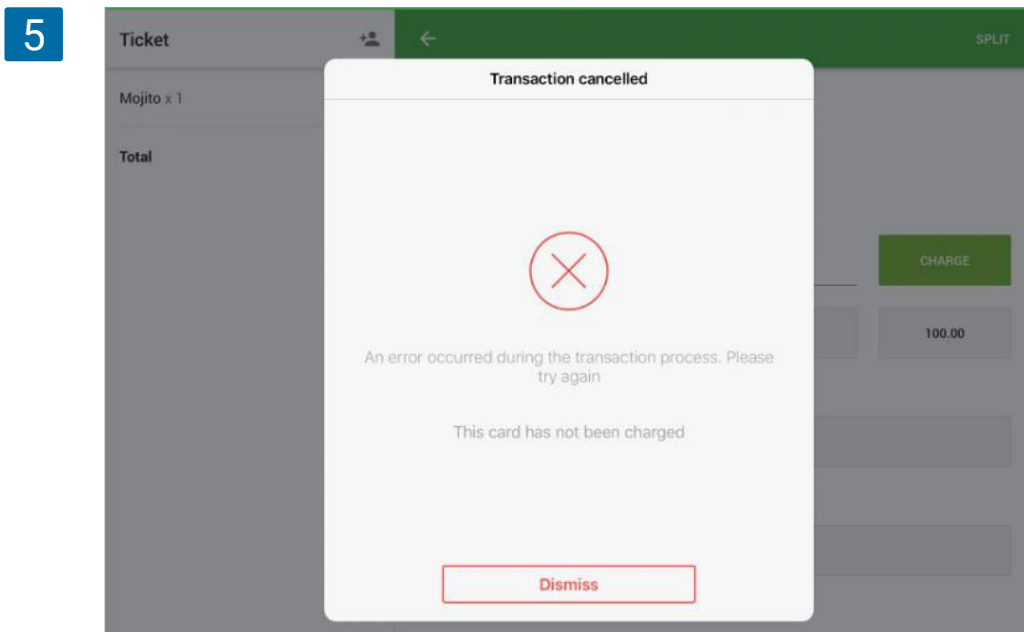


Tap 'Pay' button.

If the transaction is successful, Loyverse POS will display final screen with the paid amount.



In case of an error in the transaction, Loyverse POS will show an error message.



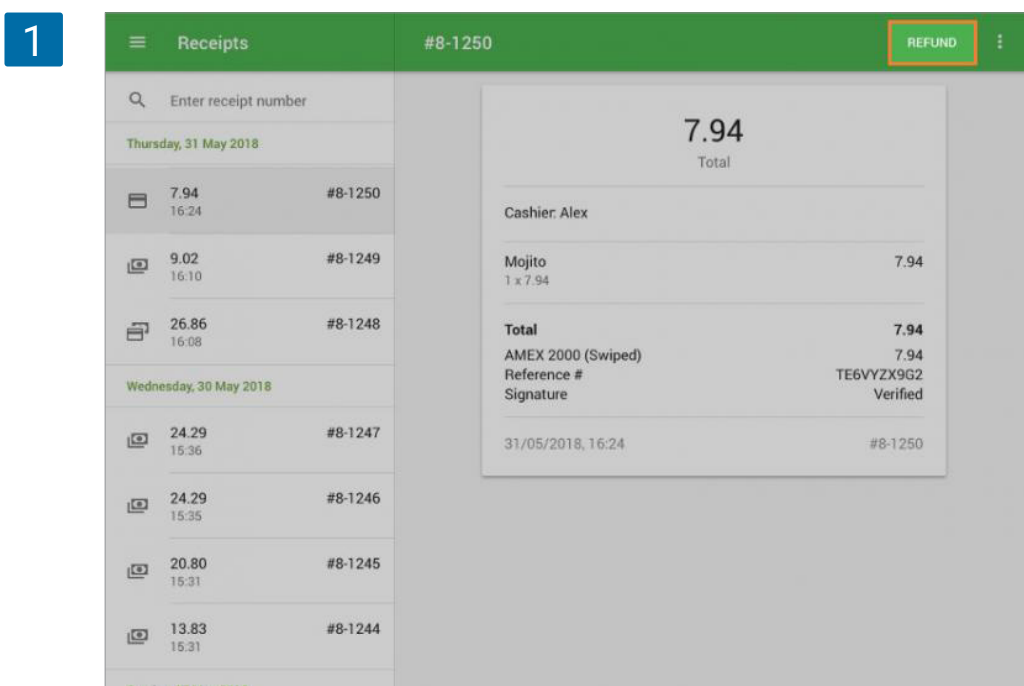
Tap 'Dismiss' button, and you will return to selecting payment type screen. You can ask the customer to choose a different type of payment (for example 'Cash') or try another card.

### 10.2.2.2 Refund

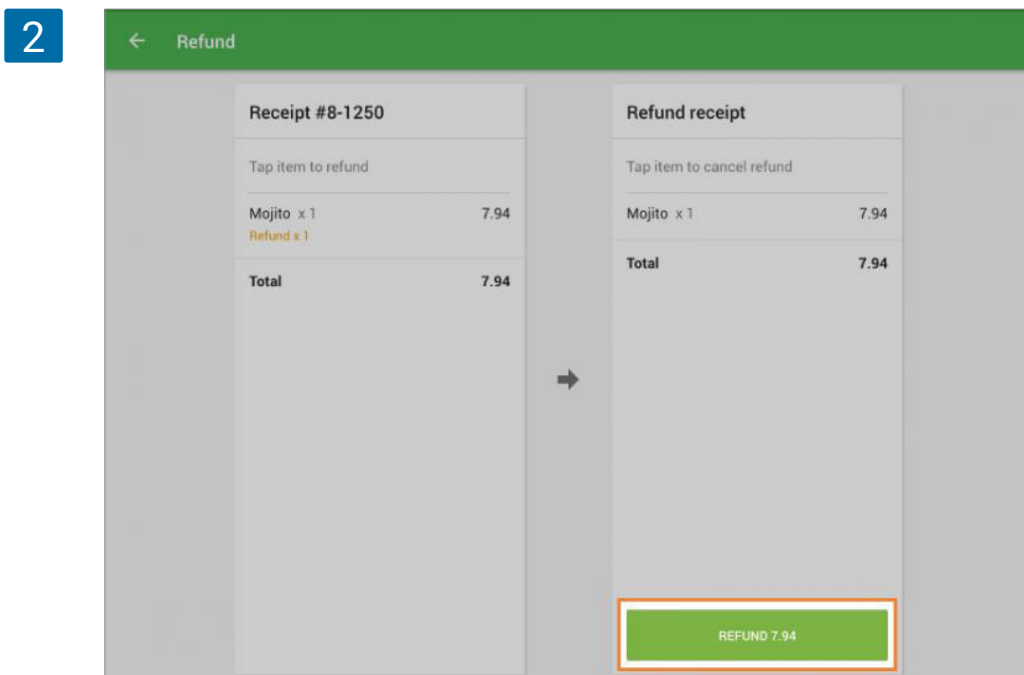
You can only refund the whole amount of card transaction. The card reader is not used in the refund process.

At Loyverse POS go to 'Receipts' menu, and tap needed receipt.

Tap 'Refund' button.

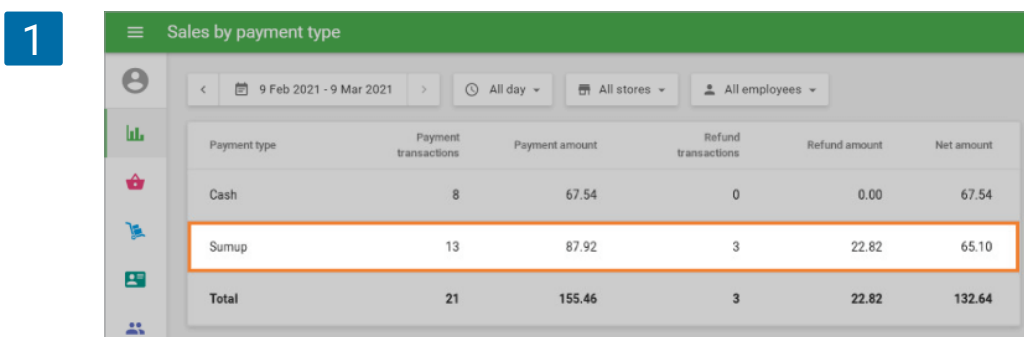


Select all items of the card payment from left ticket to move them to the right-side 'Refund receipt' list and tap 'Refund' button.



### 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.



## 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.

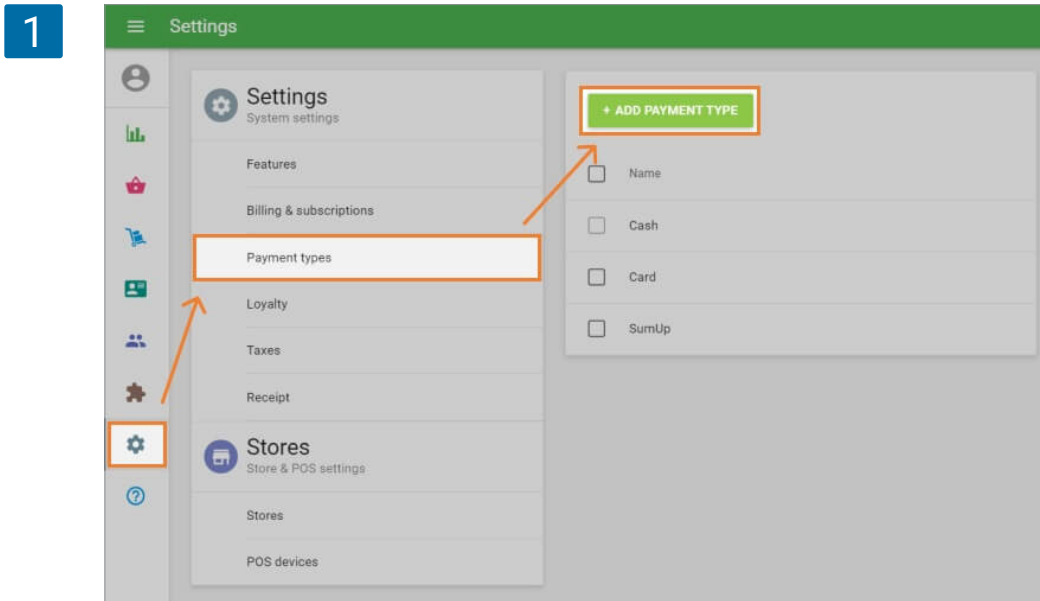
Before connecting a card reader, you need to create an account in PayPal Zettle and receive the device. Integration with Loyverse POS works on the card reader Zettle Reader 2.

#### Note

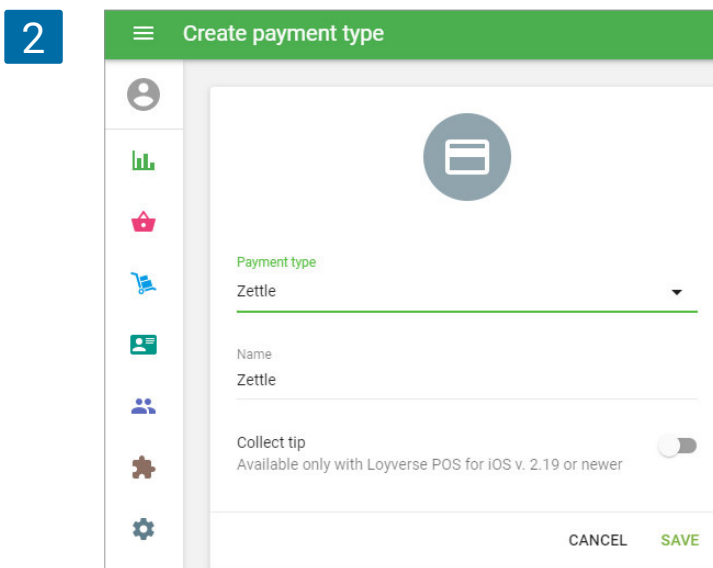
**PayPal Zettle works only with mobile devices with turned-on geolocation.**

## 10.3.1 Connecting the Card Reader

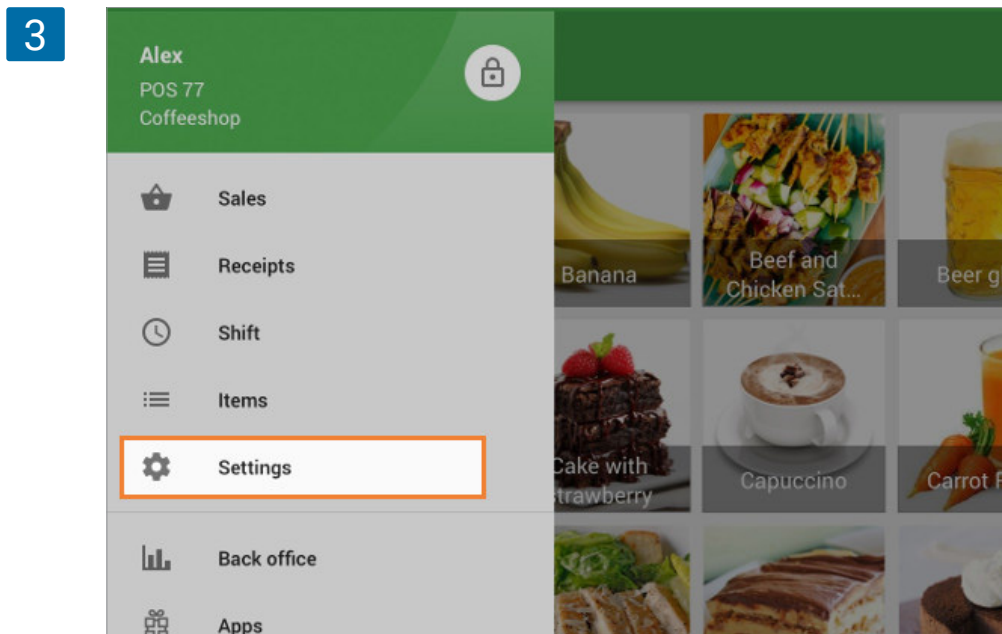
Log in to the Back Office, click the 'Settings' menu and then 'Payment types.' Click the 'Add payment type' button to add a new type of payment.



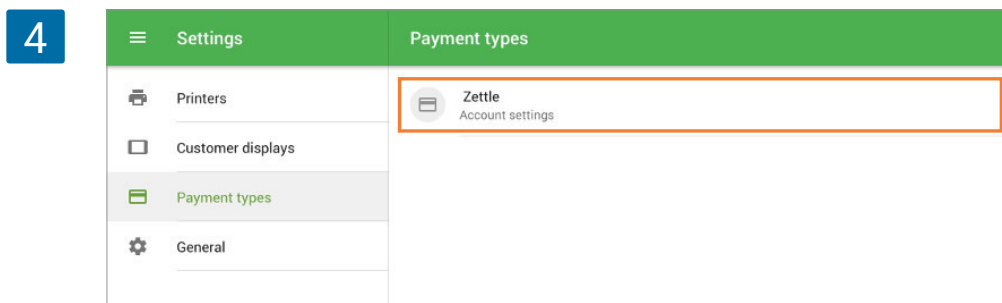
In the 'Add Payment Type' window, select the 'Zettle' payment type from the drop-down list. Save your changes when done.



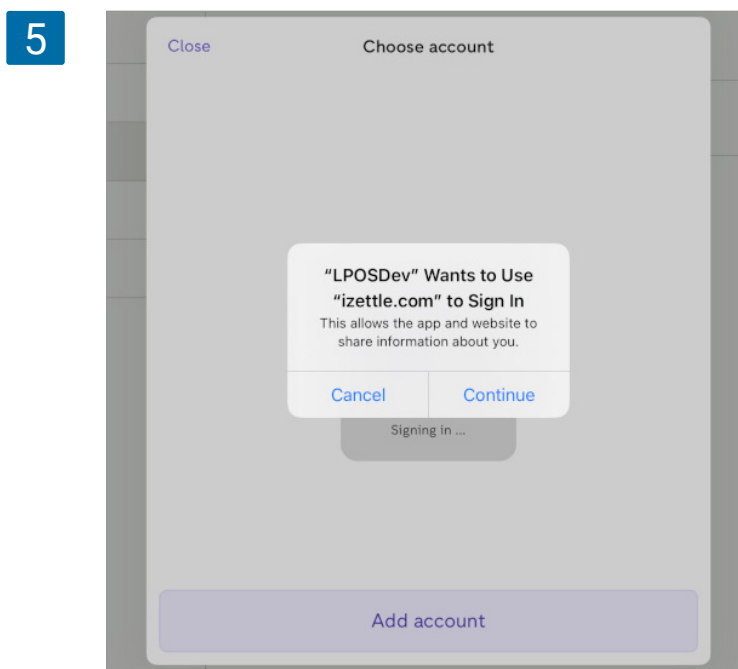
Then launch the Loyverse POS and go to Settings > Payment Types.



Tap the 'Zettle' button for account settings.

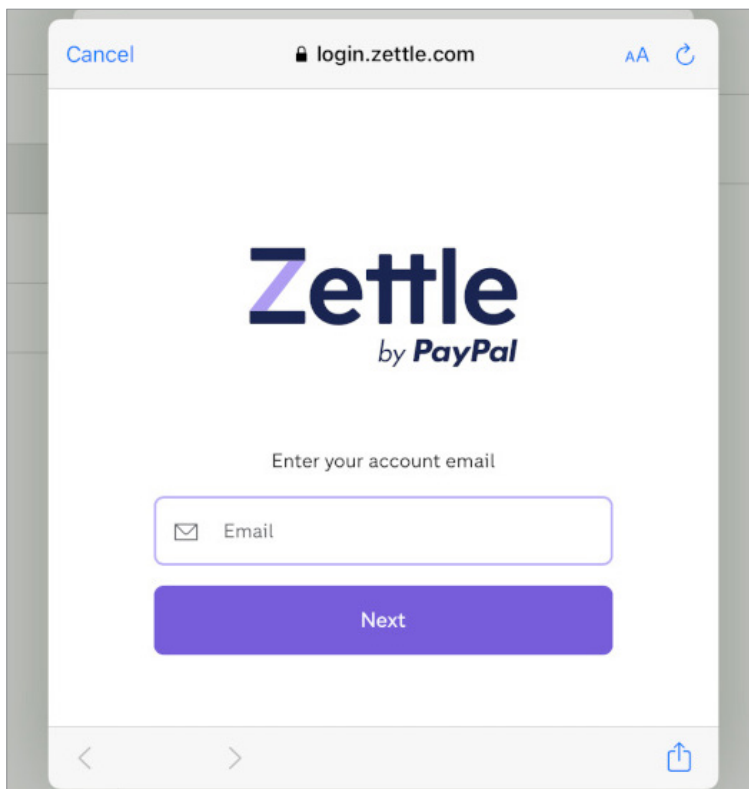


In the 'Choose account' window, confirm the access right to sign in to the Zettle account from Loyverse POS by tapping on the 'Continue' button.



Enter the Email of your Zettle account and tap the 'Next' button.

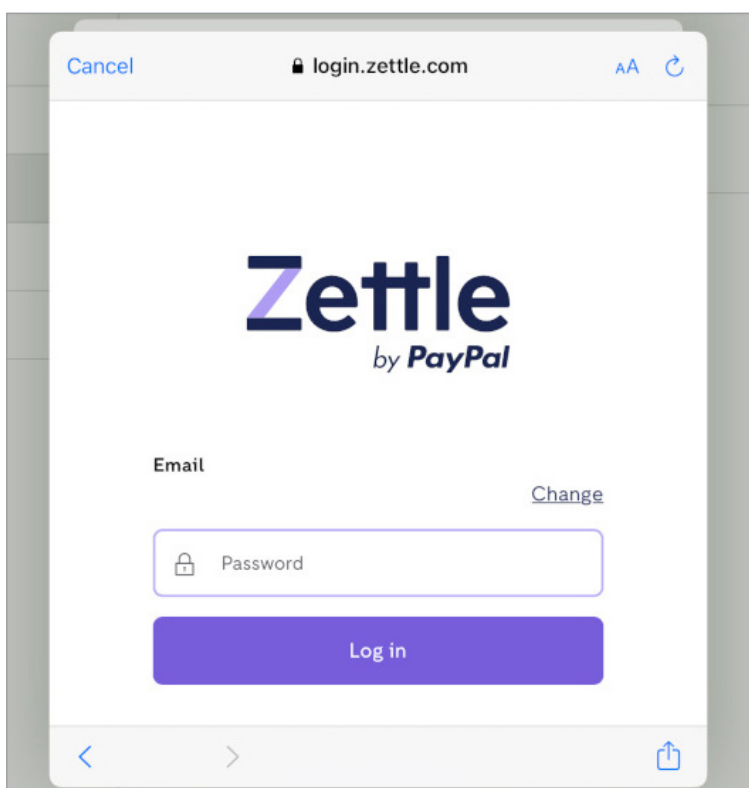
6



A screenshot of a mobile browser displaying the Zettle login page. The address bar shows 'login.zettle.com'. The page features the Zettle logo with 'by PayPal' underneath. Below the logo, the text 'Enter your account email' is displayed. There is a text input field with an envelope icon and the placeholder text 'Email'. A large purple button labeled 'Next' is positioned below the input field. The browser interface includes a 'Cancel' link, a lock icon, and zoom/share icons in the top right. Navigation arrows and a share icon are visible in the bottom bar.

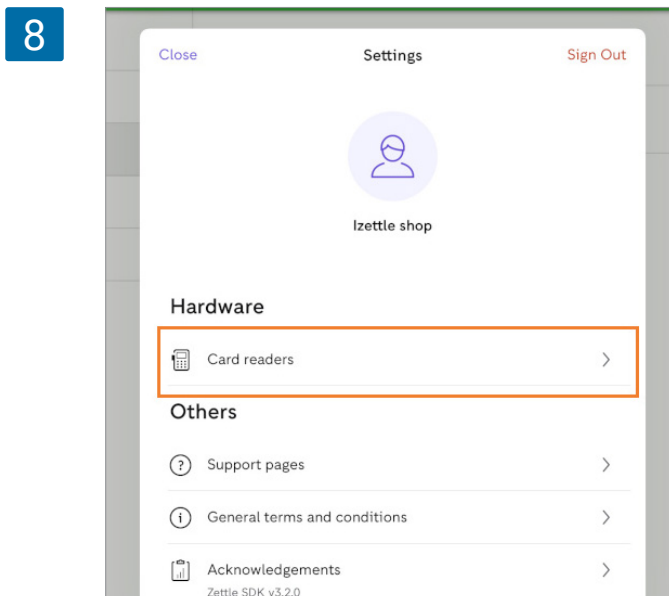
Enter the password of your Zettle account and tap the 'Login' button.

7

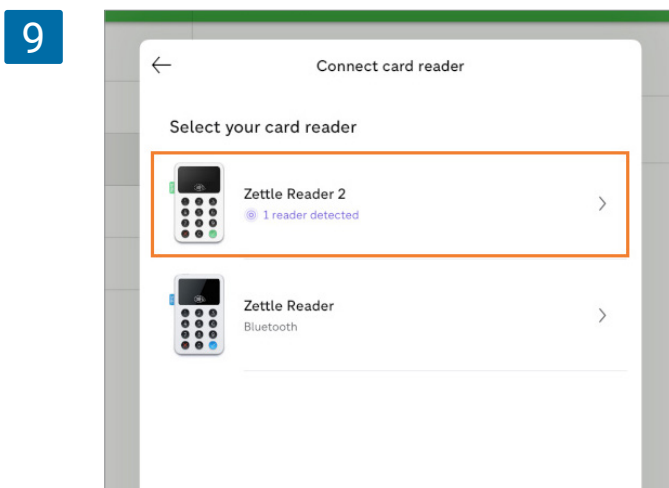


A screenshot of the same mobile browser displaying the Zettle login page, but at the password entry step. The text 'Email' is now above the input field, and a 'Change' link is to its right. The input field has a lock icon and the placeholder text 'Password'. A large purple button labeled 'Log in' is positioned below the input field. The browser interface and bottom bar remain the same as in the previous screenshot.

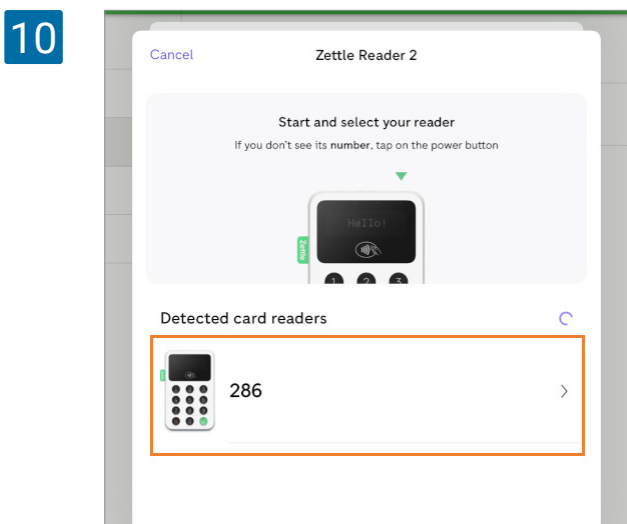
You will log in to your Zettle account. Tap the 'Card readers' button.



Select your type of card reader.



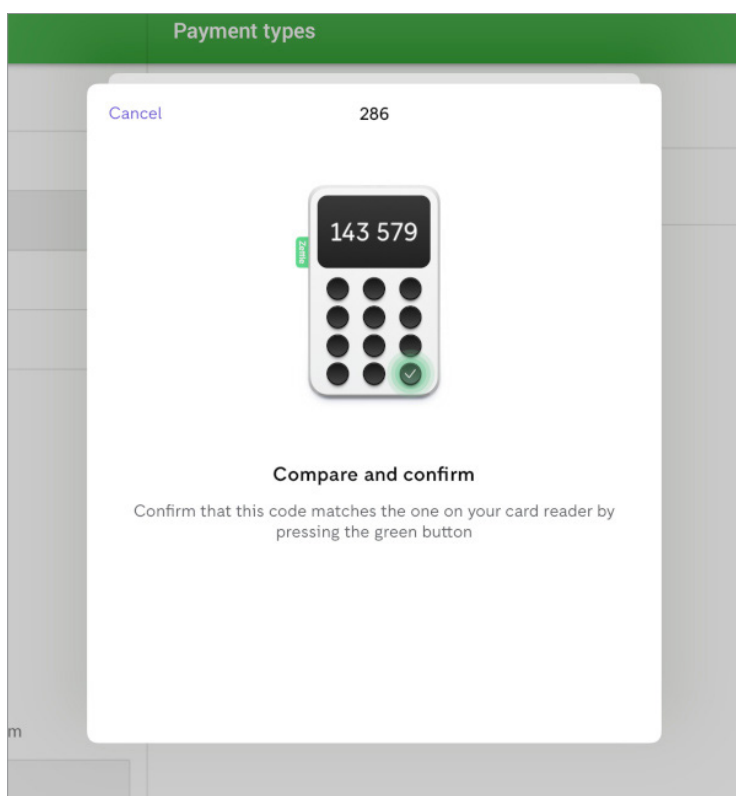
Follow the instruction on the screen: start your card reader. The system will detect your card reader. Tap on it to select.





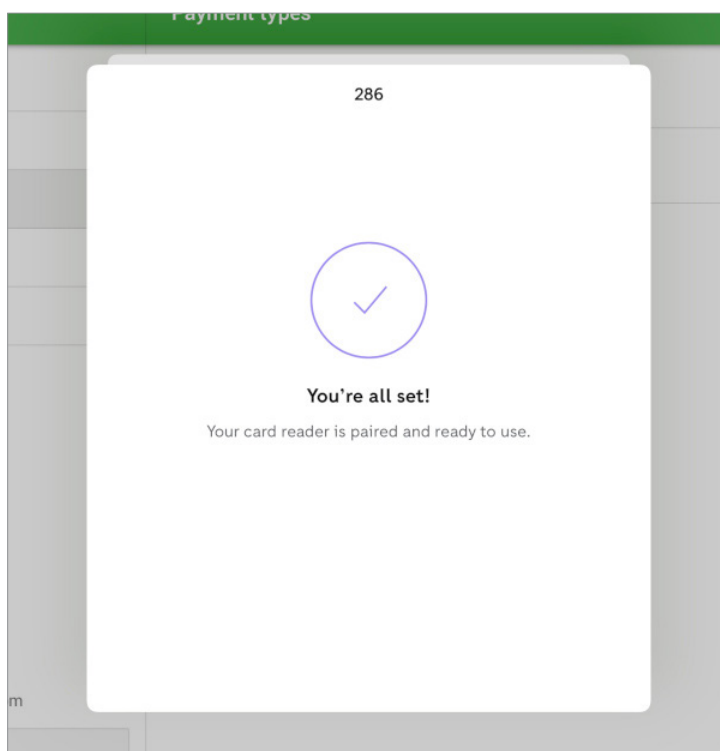
Confirm the connection to the card reader by comparing code and pressing the green button on the card reader.

11



Now your card reader is connected.

12



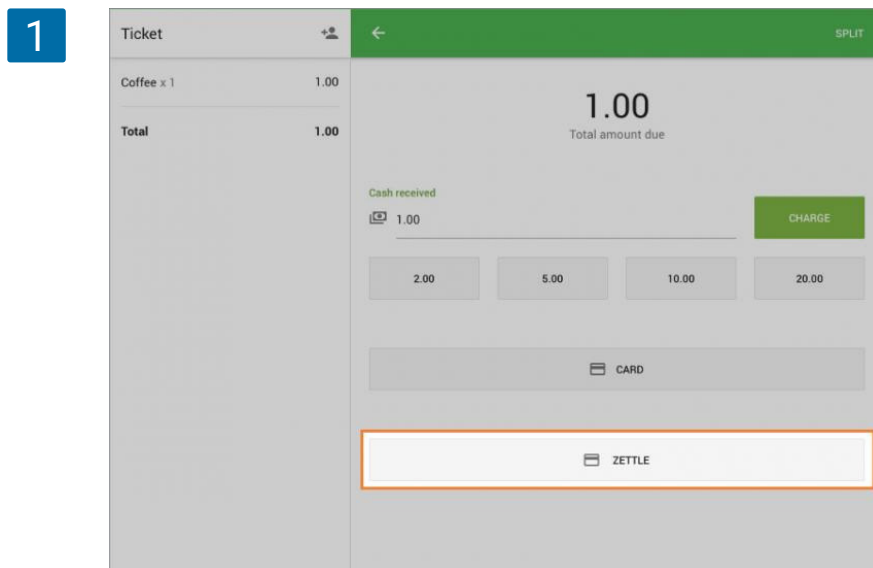
You are ready to accept card payments.

## 10.3.2 Processing Payments

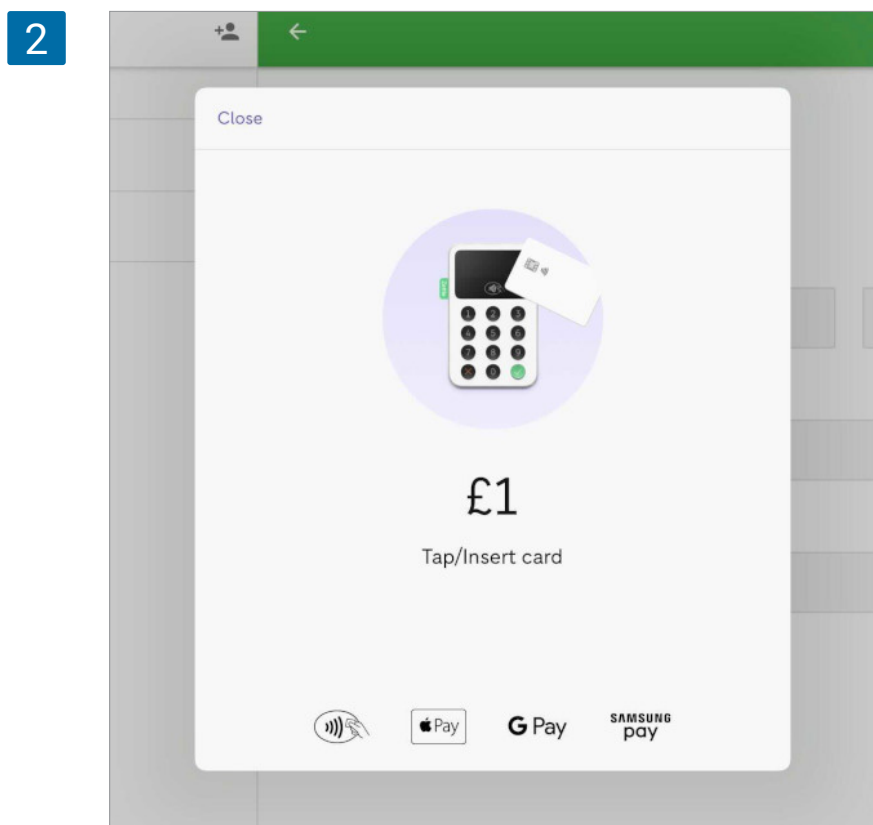
### 10.3.2.1 Payment

Add items to the ticket and press 'Charge'.

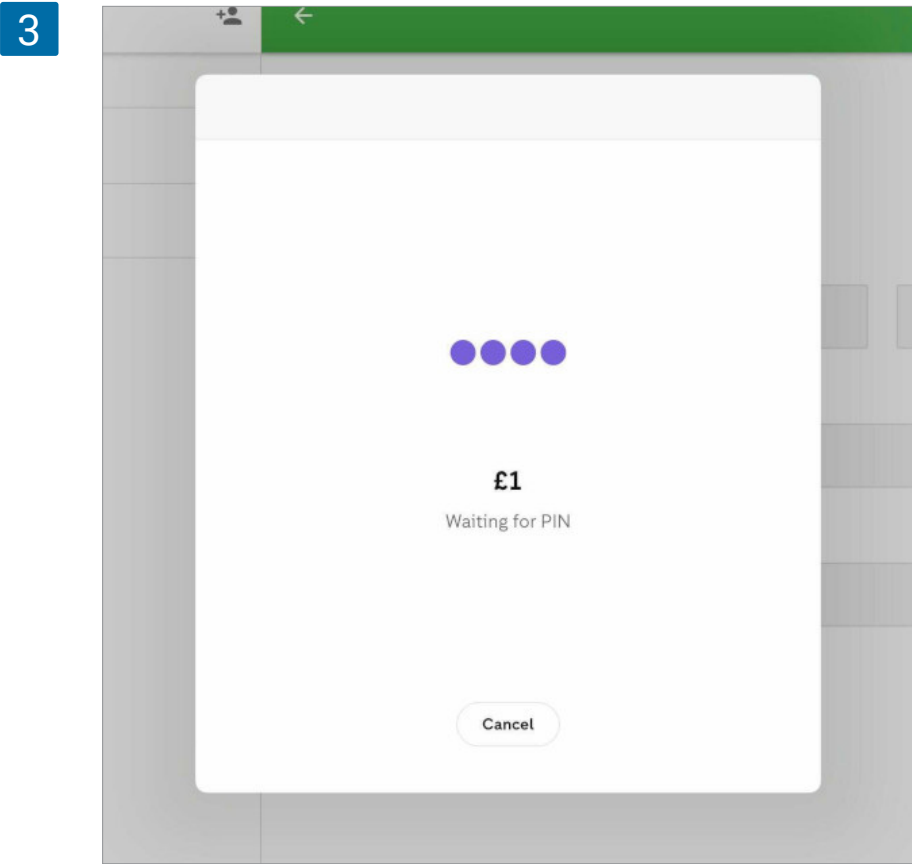
Tap the 'Zettle' button selecting payment type.



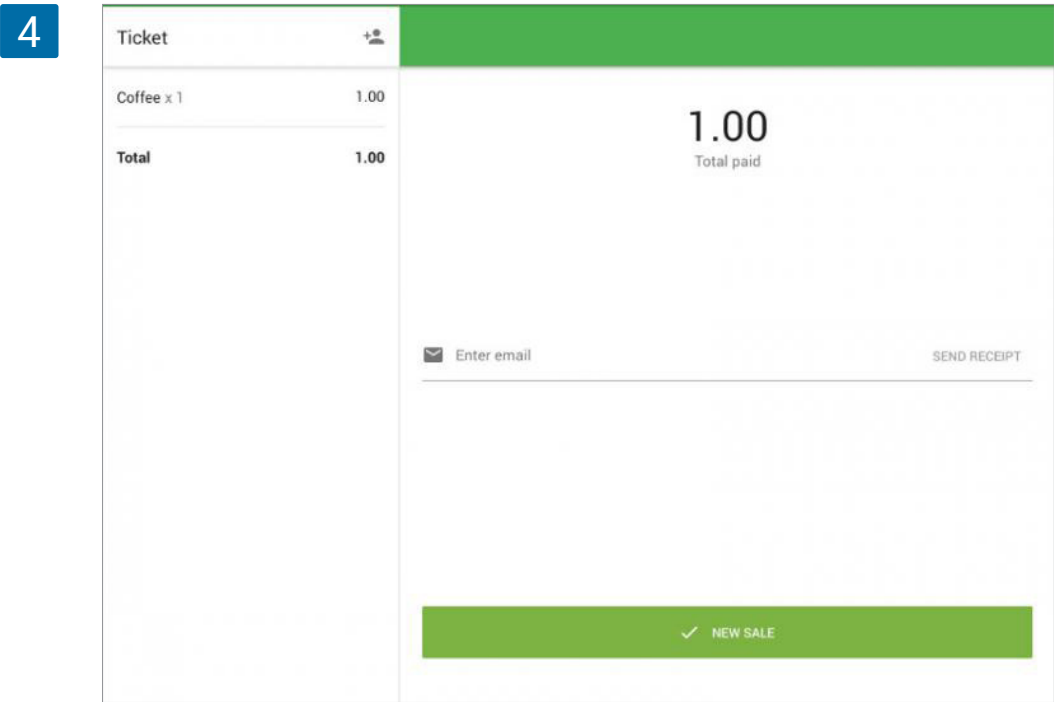
Loyverse POS will wait for a response from the card reader, and you will see an invitation to tap/insert card on the card reader.



Insert your cards with a chip into the bottom slot of the card reader and give it to the customer to enter the PIN.

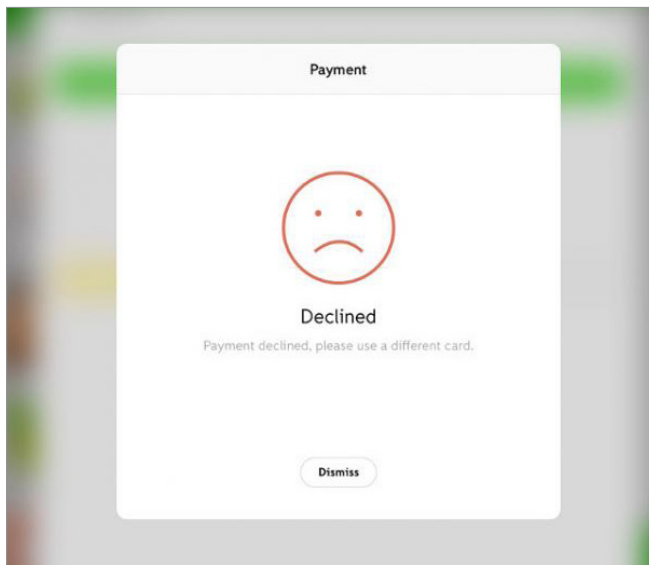


If the transaction is successful, Loyverse POS will display the 'Transaction is successful' screen.



In case of an error in the transaction, Loyverse POS will show an error message.

5



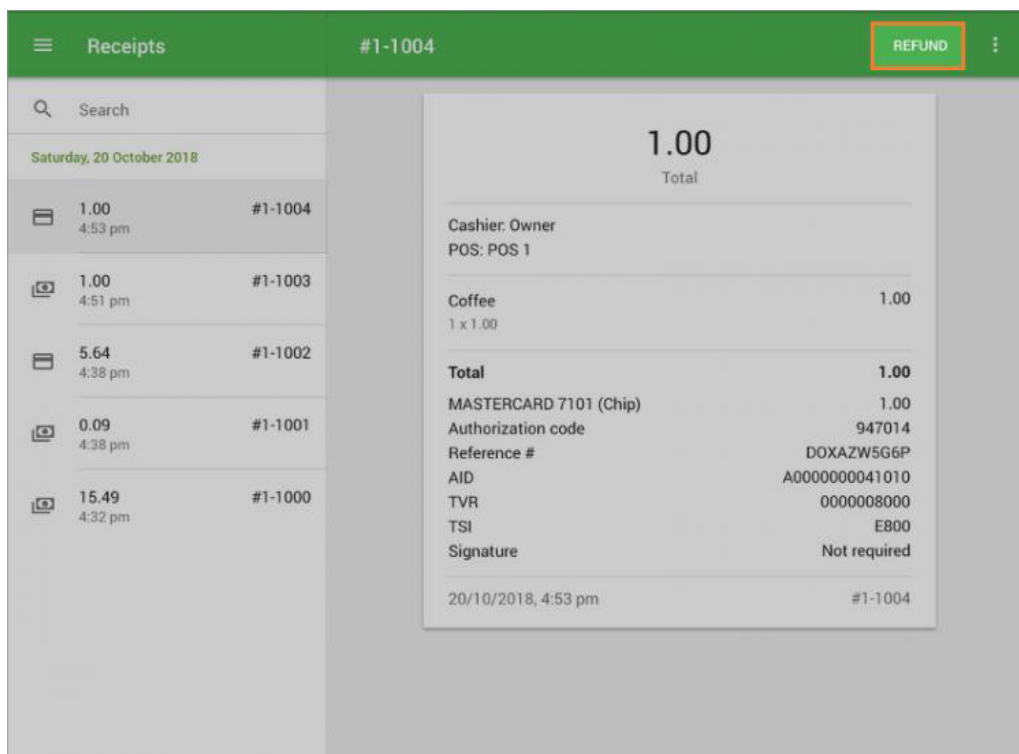
Tap the 'Dismiss' button, and you will return to the 'select payment type' screen. You can ask the customer to choose a different type of payment (for example 'Cash') or try another card.

### 10.3.2.2 Refund

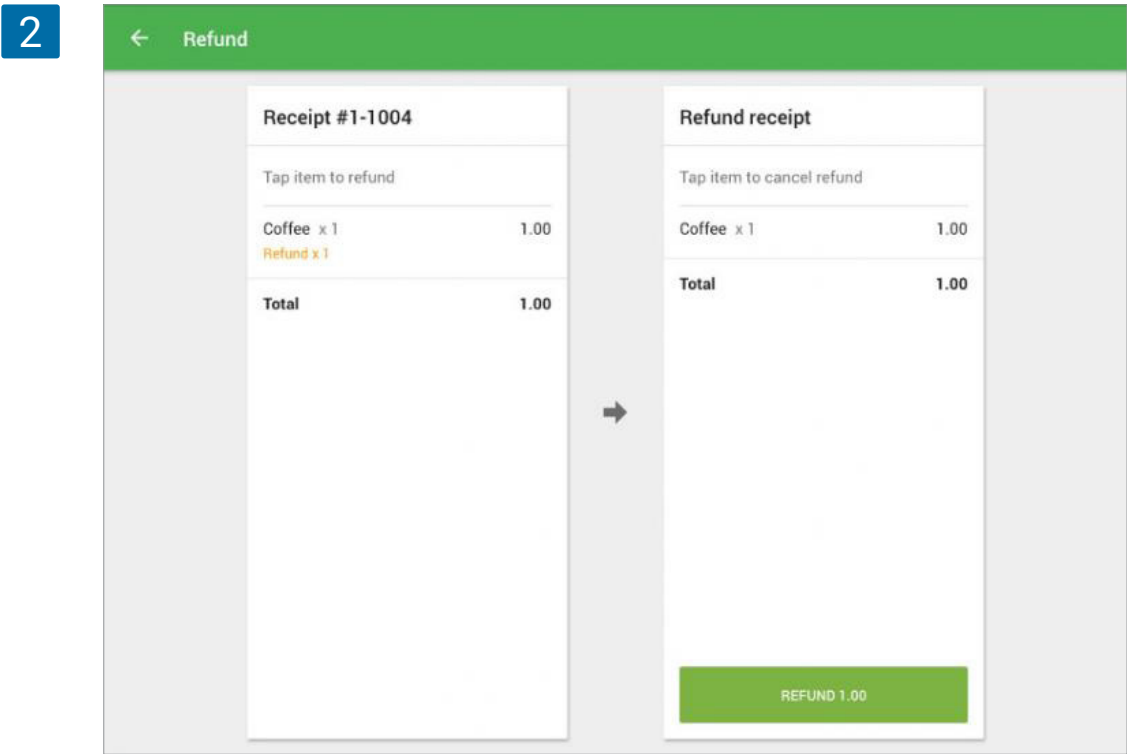
You can refund the ticket fully or partially. The card reader is not used in the refund process.

In the Loyverse POS, go to the 'Receipts' menu, and tap on the desired receipt. Then tap 'Refund'.

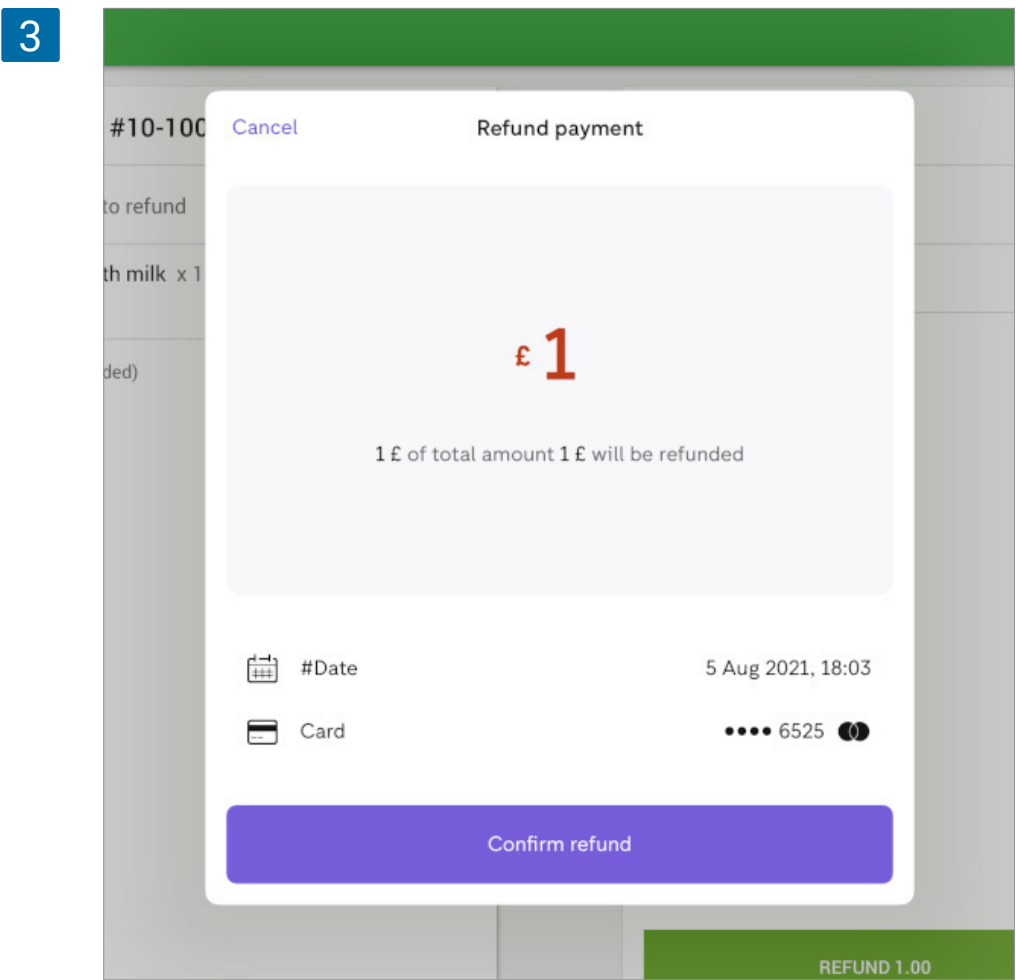
1



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.

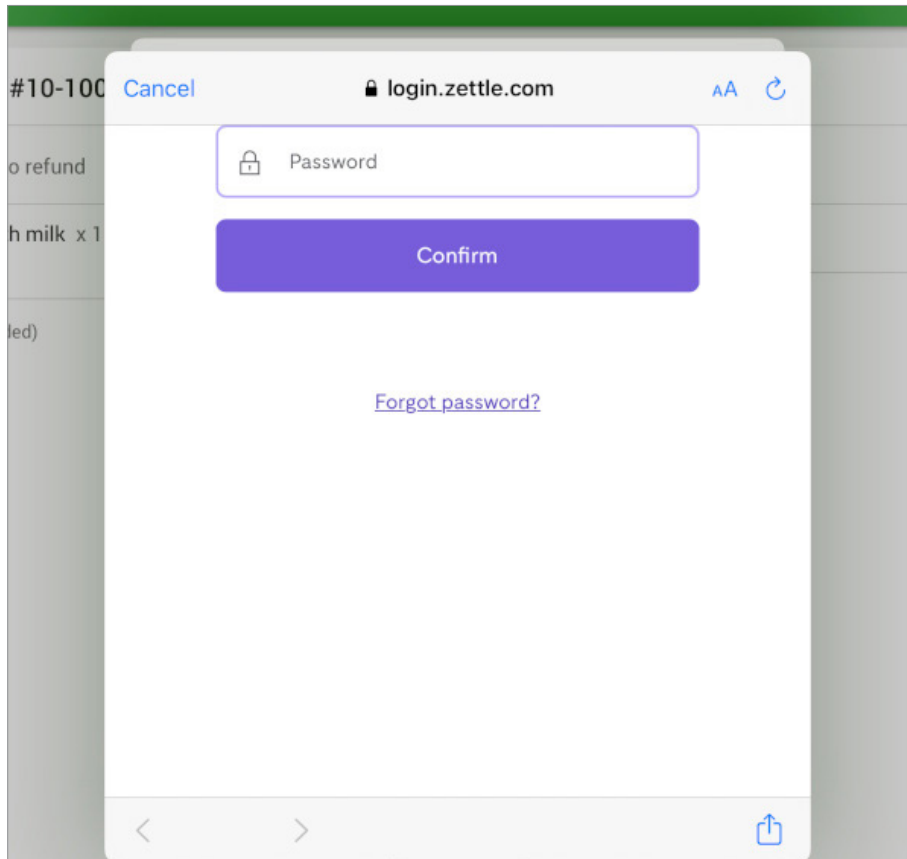


At the 'Refund payment' screen, check the refund details and type the 'Confirm refund' button.



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

Sales by payment type						
<div><div></div><div>&lt; Jul 7, 2021 - Aug 5, 2021 &gt;</div><div>All day</div><div>All employees</div></div>						
EXPORT						
Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount	
Card	5	4.00	4	2.00	2.00	
Cash	61	183.83	51	110.33	73.50	
Cash rounding	1	-0.17	1	-0.17	0.00	
Zettle	118	128.00	100	95.00	33.00	
Sumup	27	103.17	22	84.67	18.50	
Total	211	419.00	177	292.00	127.00	

## 10.4 How to Accept Credit Cards with Loyverse POS and Yoco

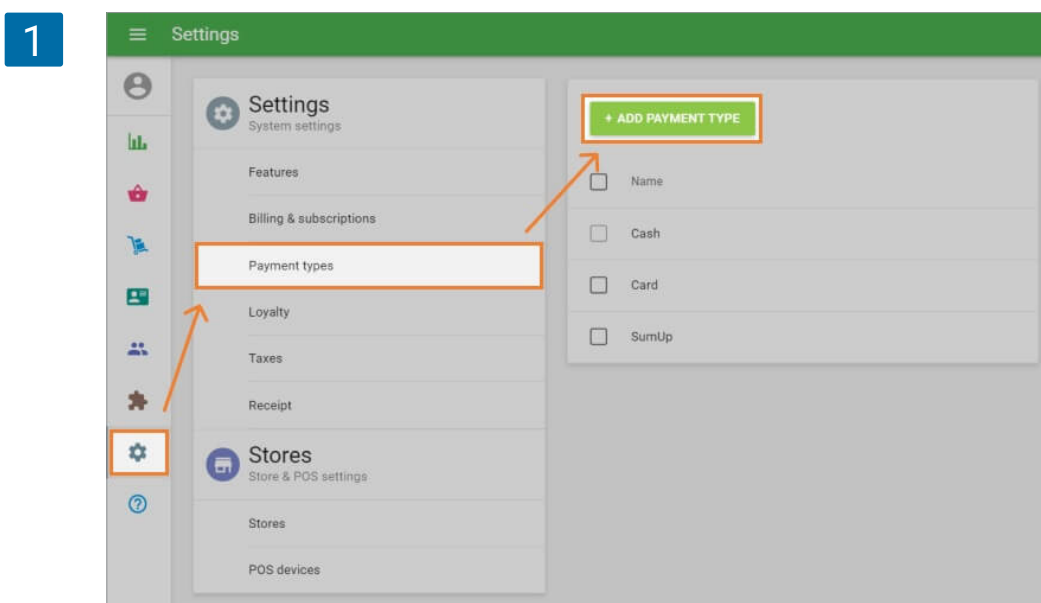
**This feature only works on iOS devices.**

Loyverse POS merchants can accept credit card payments via Yoco, and it is available to customers in South Africa.

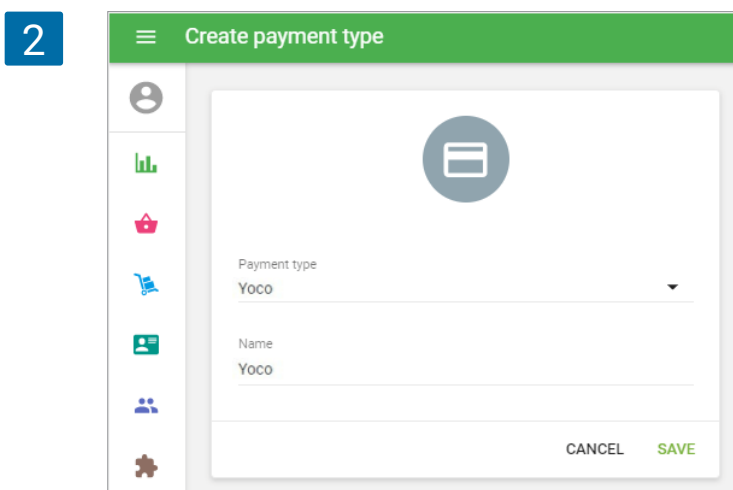
Before connecting a card reader, you need to create an account in Yoco and receive the device. Integration with Loyverse POS works on the card readers YOCO PRO, YOCO-GO, and YOCO-Neo.

### 10.4.1 Connecting the Card Reader

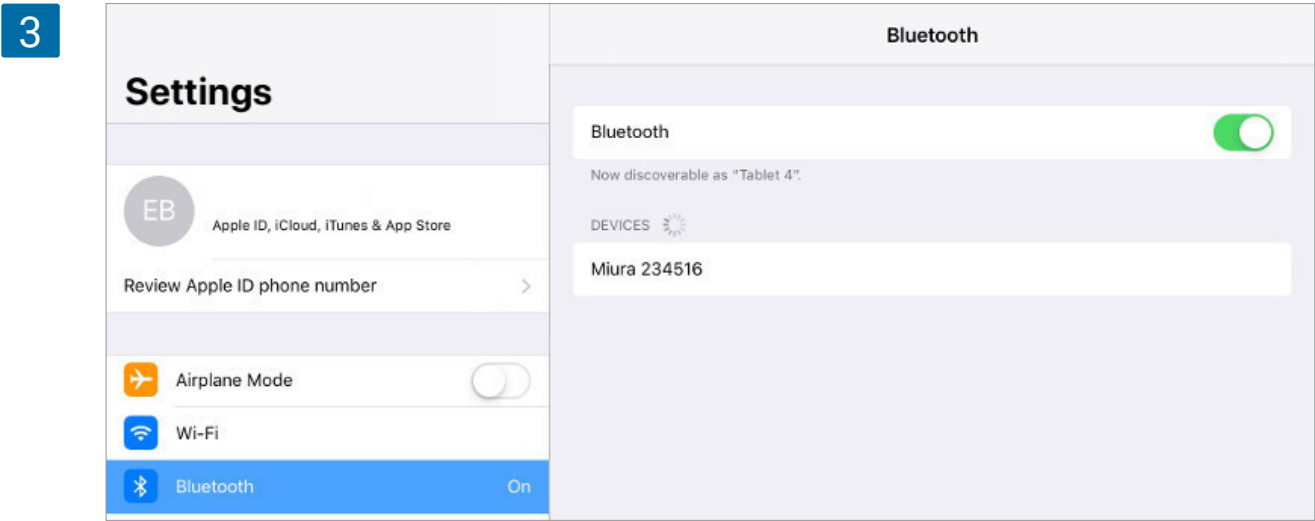
Log in to the Back Office, click the 'Settings' menu and then 'Payment types.' Click the 'Add payment type' button to add a new type of payment.



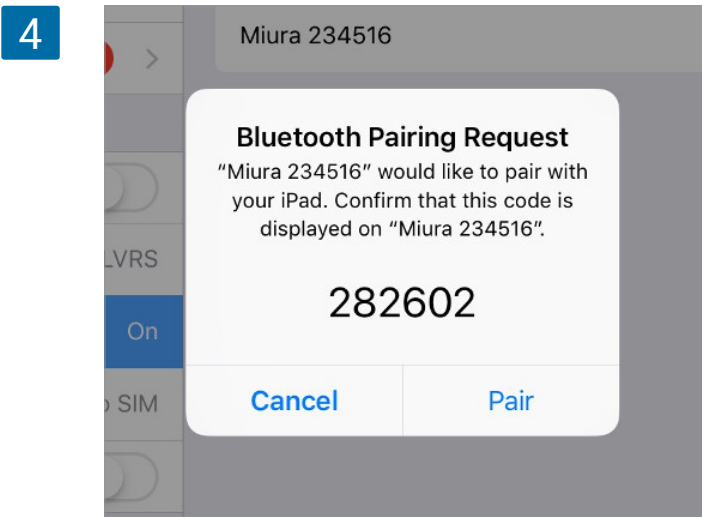
In the 'Create payment type' window, select the 'Yoco' payment type from the drop-down list. Save your changes when done.



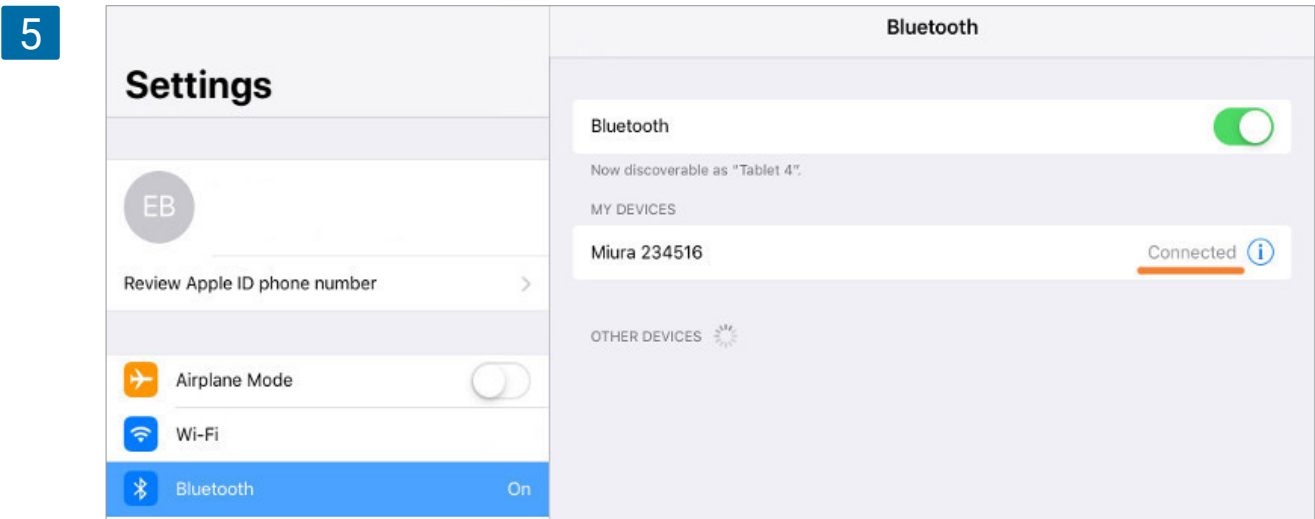
Turn on your Yoco card reader. On your mobile device, go to the Settings and turn on the Bluetooth. You will see the Yoco card reader in the devices list. Tap on the Yoco device to connect.



Tap the 'Pair' button on the mobile device and 'OK' on the card reader.

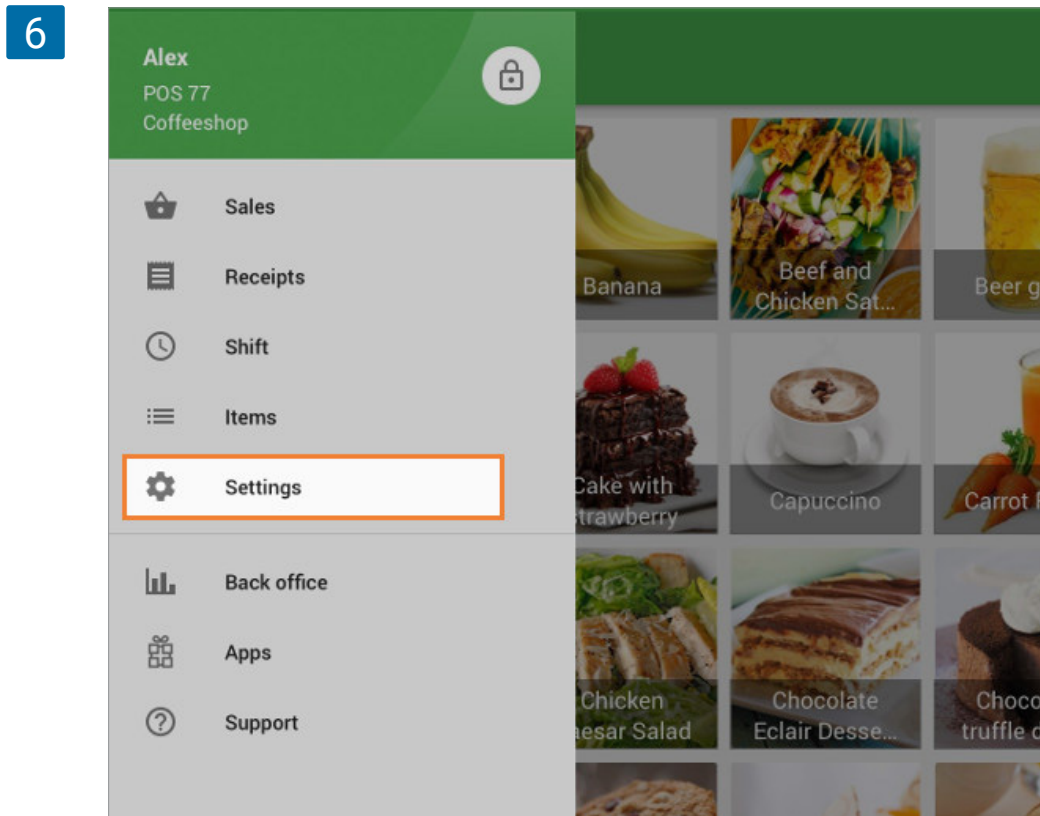


The device will change its status to 'Connected'.

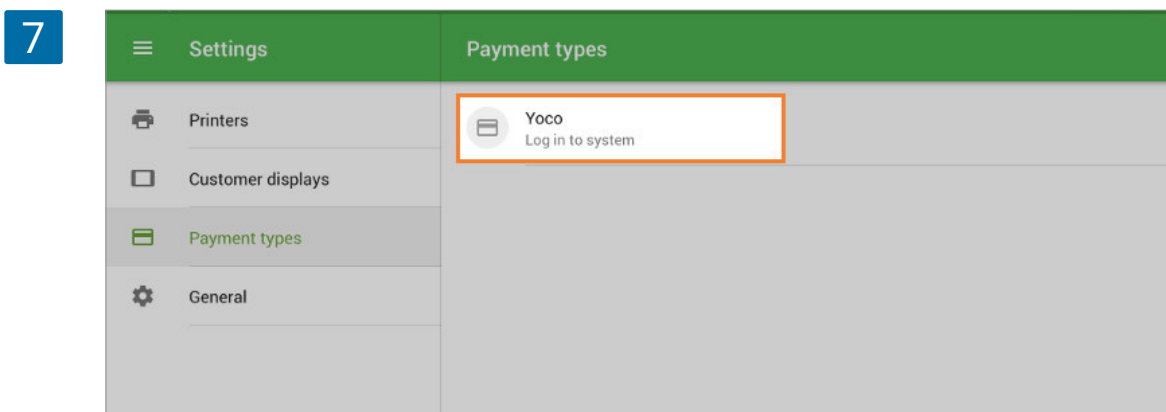




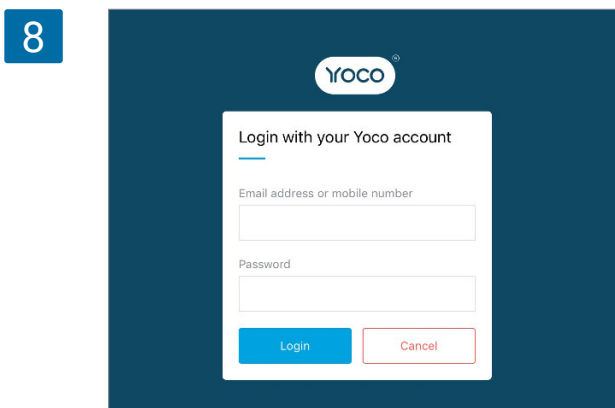
Then launch the Loyverse POS and go to Settings > Payment Types.



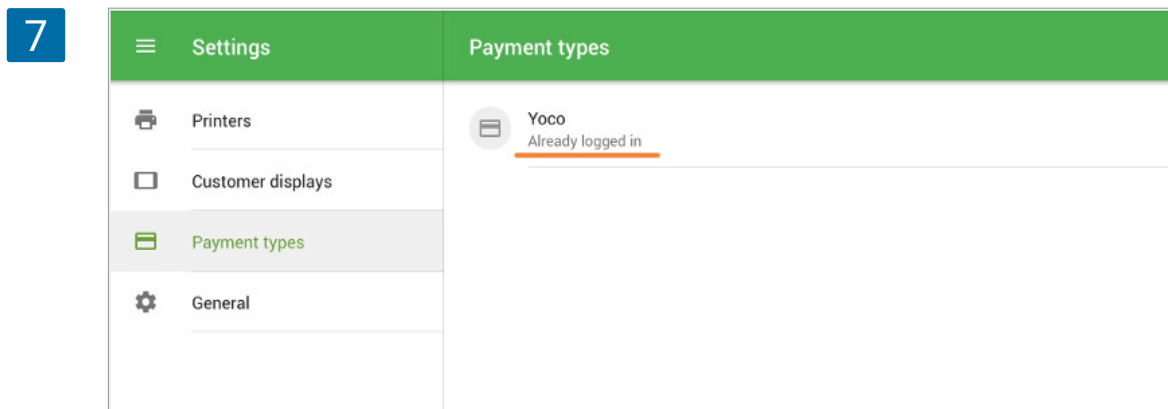
Tap the 'Yoco' button for account settings.



Login in to your Yoco account by entering the Email and Password, then tap 'Login'.



Tap the 'Yoco' button for account settings.

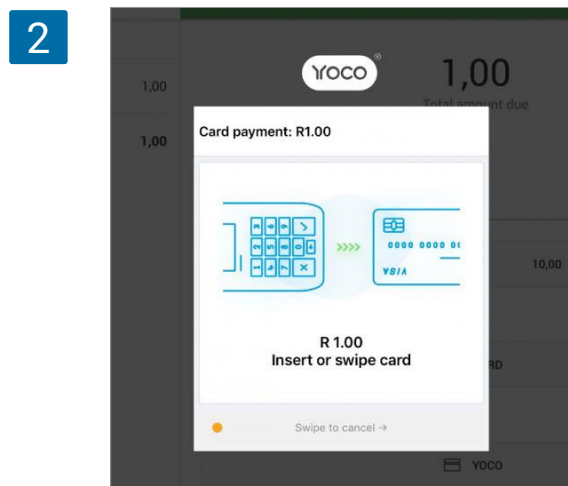
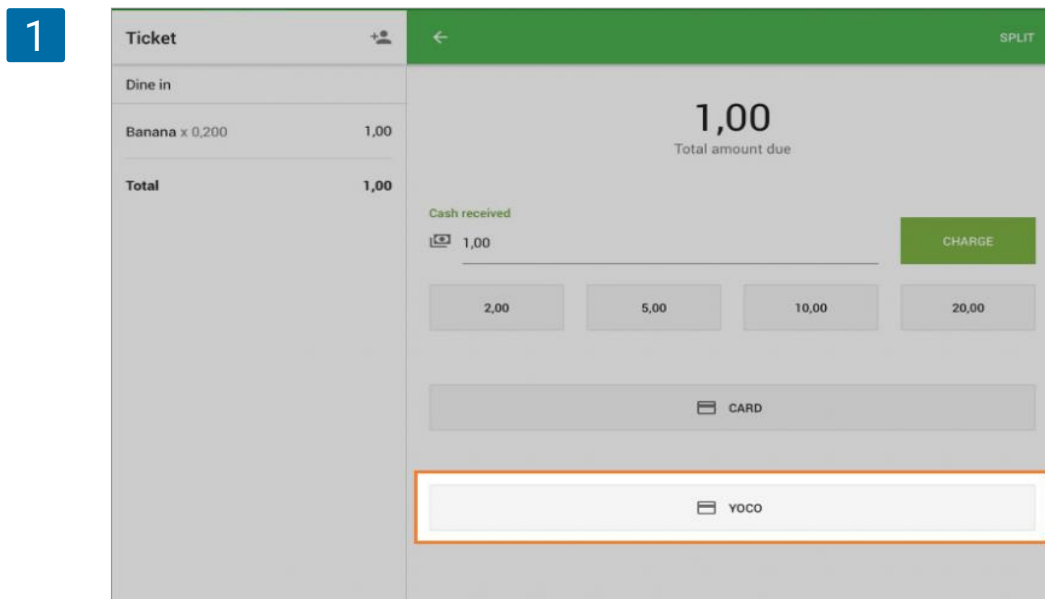


Now you are ready to accept card payments.

## 10.4.2 Processing Payments

### Payment

Add items to the ticket and press 'Charge'.  
Tap 'Yoco' as the payment type.



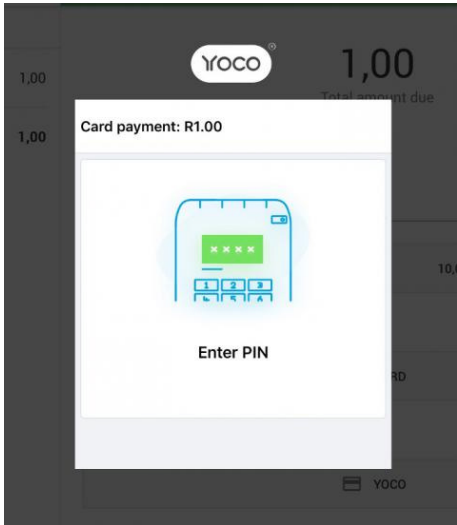
Loyverse POS will wait for a response from the card reader, and you will see an invitation to insert/swipe card on the card reader.

Insert the card with a chip into the bottom slot or swipe at the top slot of the card reader and give it to the customer to enter the PIN.

3

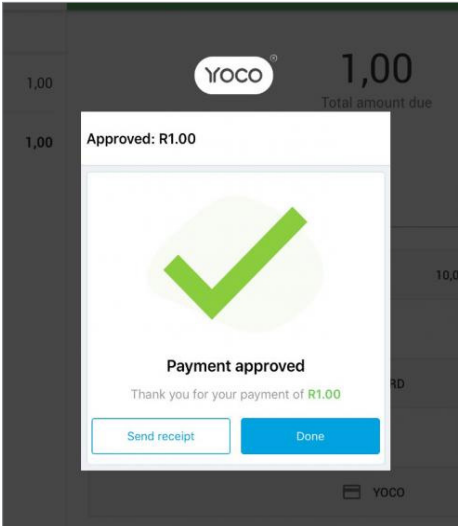


4



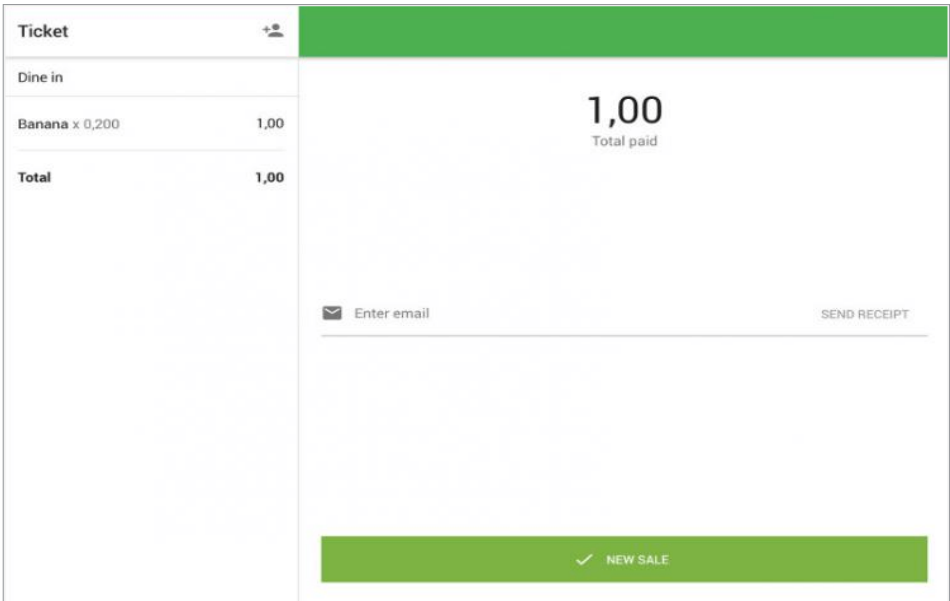
If the transaction is successful, you will see the 'payment approved' window. Tap 'Done' to continue.

5

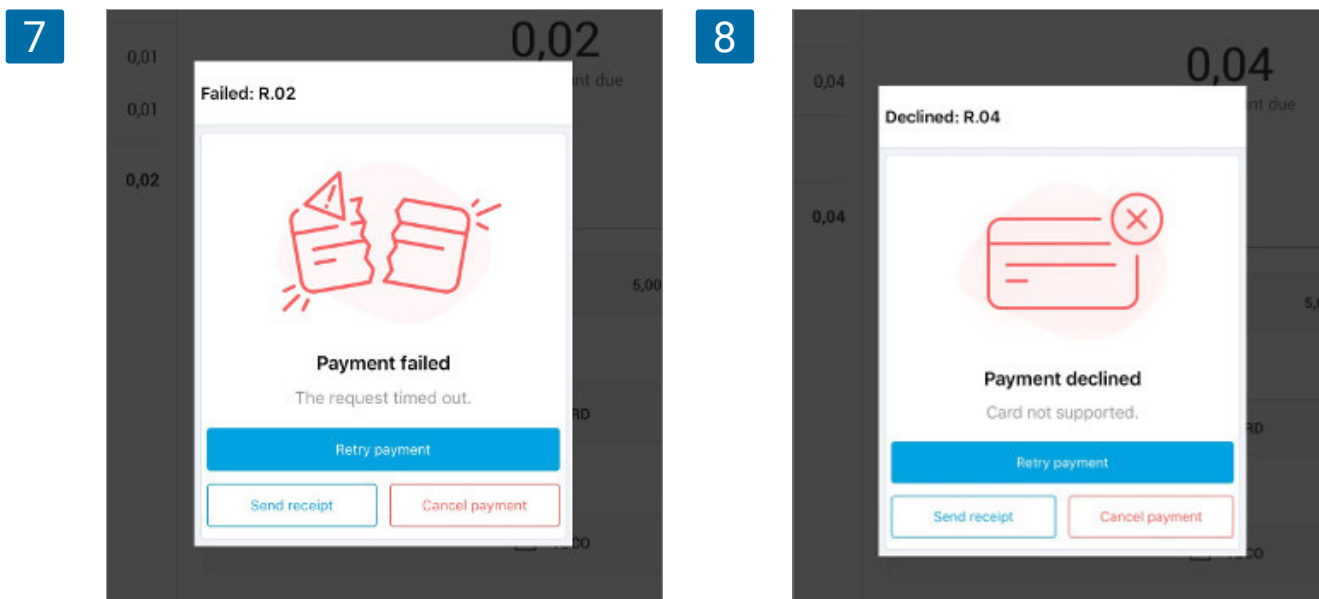


Loyverse POS will display the screen with 'Total paid amount'.

6



In case of an error in the transaction, you will see an error message.



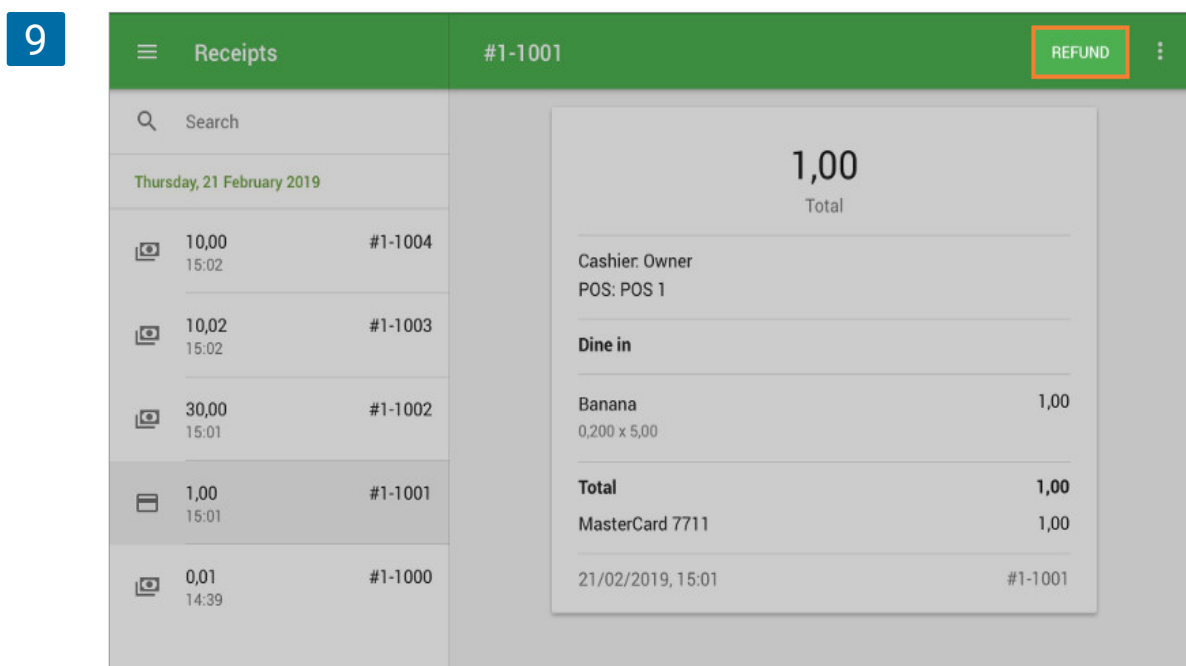
You can retry the payment or tap the 'Cancel payment' button. In this case, you will return to the 'select payment type' screen. You can ask the customer to choose a different type of payment (for example 'Cash') or try another card.

## Refund

You can only refund the whole amount of the transaction. The card reader is not used in the refund process.

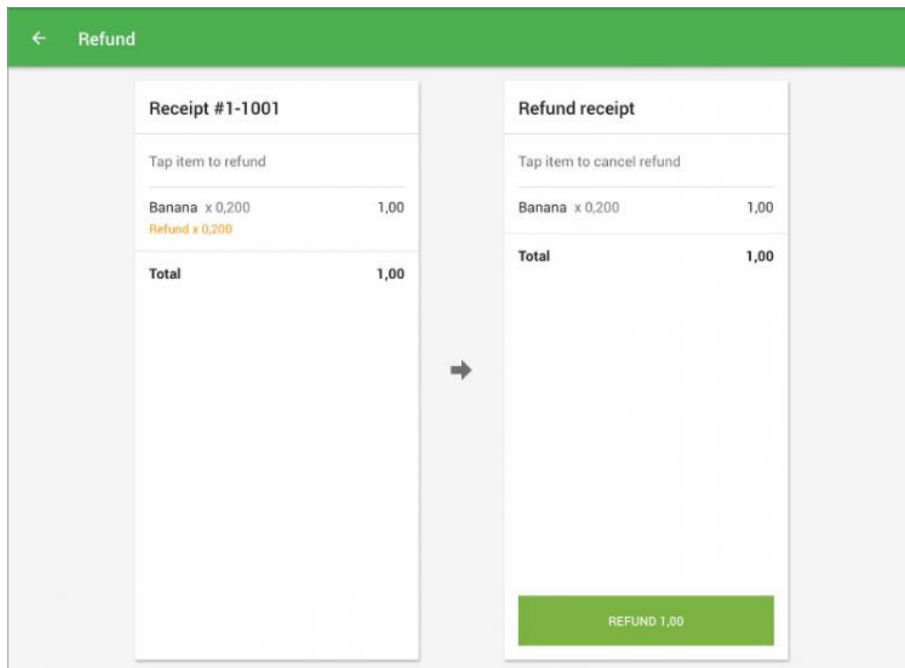
In the Loyverse POS, go to the 'Receipts' menu, and tap on the desired receipt.

Then tap 'Refund'.

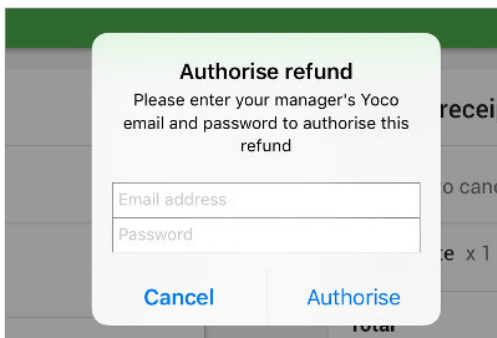


Select all items on the receipt that were paid via card (on the left side) to move them to the 'Refund receipt' list (on the right side), and tap the 'Refund' button.

10



11



At the 'Authorise refund' screen, type in the Yoco Email and password and tap 'Authorise'.

### 10.4.3 Reports

You can view the total number of transactions performed with Yoco. In the Back Office, select the 'Sales by payment type' report.

1

Sales by payment type						
<div> <div>&lt; 17 Apr 2021 - 23 Apr 2021 &gt;</div> <div>All day</div> <div>All stores</div> <div>All employees</div> </div>						
EXPORT						
Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount	
Card	112	18,982.40	0	0.00	18,982.40	
Cash	193	23,715.12	1	8.24	23,706.88	
Cash rounding	30	0.76	0	0.00	690.76	
Yoco	19	459.52	1	44.49	415.03	
Total	324	43,157.04	2	52.73	43,104.31	

## 10.5 How to Accept Credit Cards with Loyverse POS and Tyro

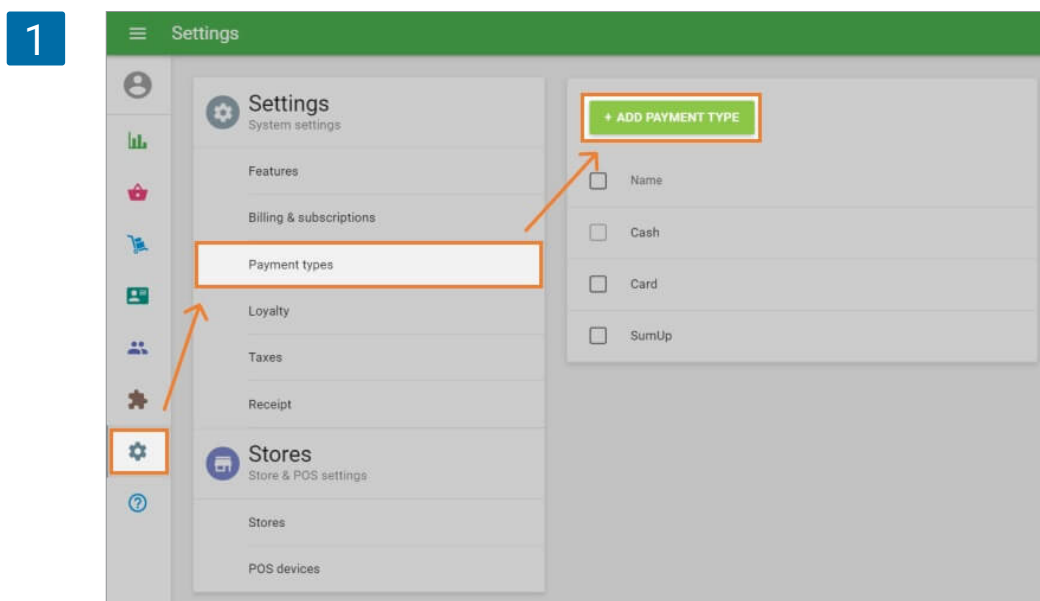
**This feature only works on iOS devices.**

Loyverse POS merchants can [accept credit card](#) payments via a provider of electronic funds transfer at point of sale (EFTPOS) - Tyro. Tyro is only available to merchants and customers in Australia.

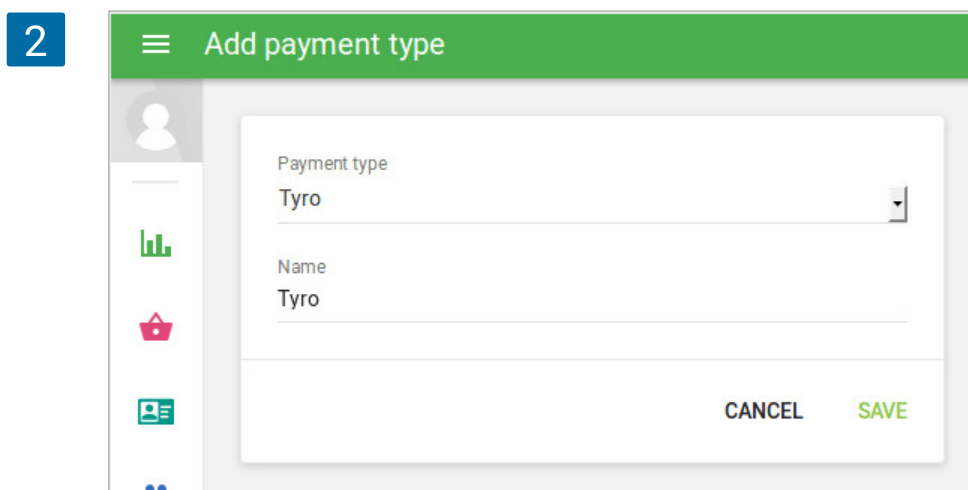
Before connecting a terminal, you have to create an account in Tyro and receive the device. Integration with Loyverse POS works on the Yoximo terminal GSM 3G.

### 10.5.1 Connecting Tyro Terminal

Log in to the Back Office, click on the 'Settings' menu and then 'Payment types'. Click on the '+ Add payment type' button to add a new type of payment.

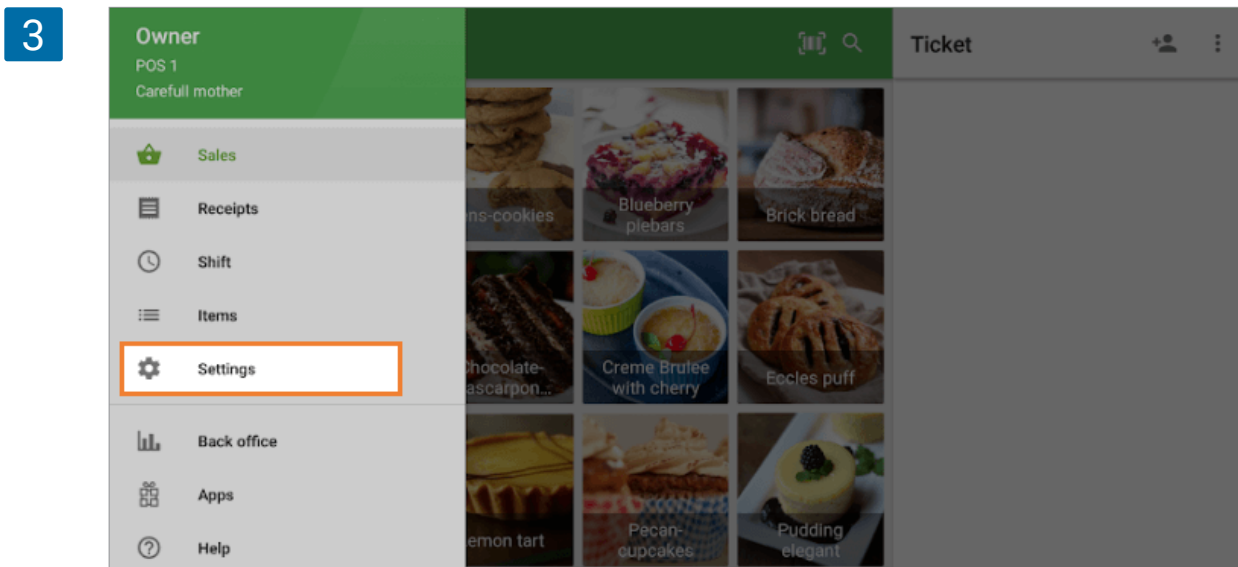


In the Add Payment Type window, select 'Tyro' in the payment type drop-down list. Save your changes when done.

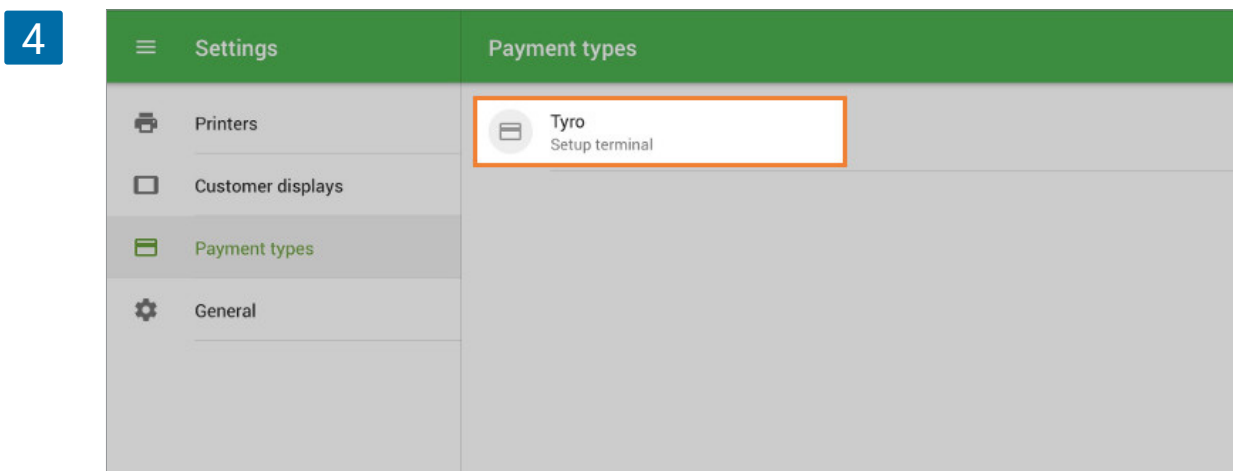


Turn on your Tyro terminal. It should also be connected to the Internet.

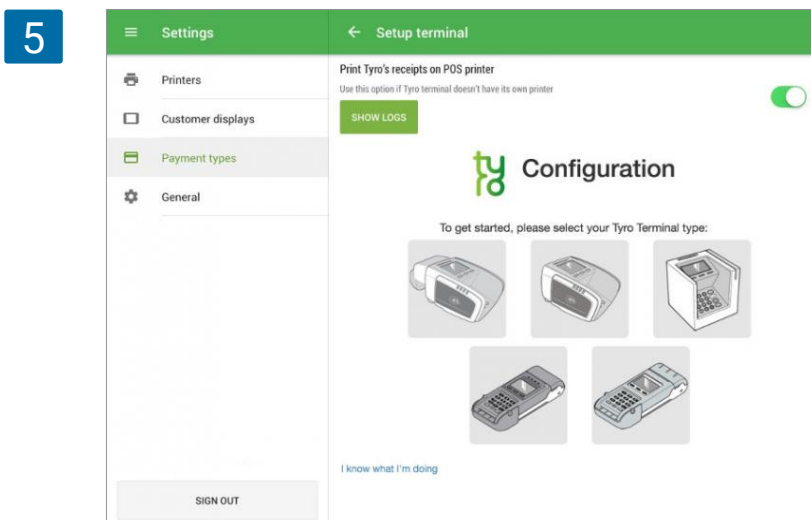
Then launch Loyverse POS and go to Settings > Payment Types.



Tap the 'Tyro' button for account settings.

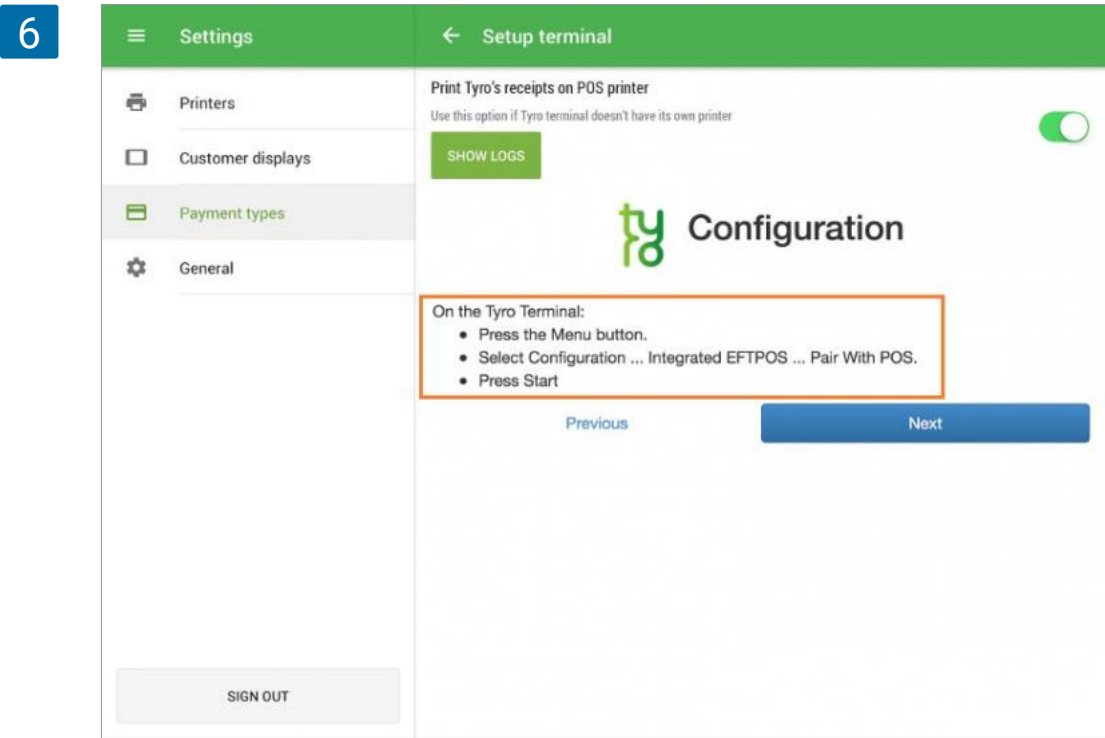


In the 'Tyro Configuration' window, select your Tyro Terminal type.

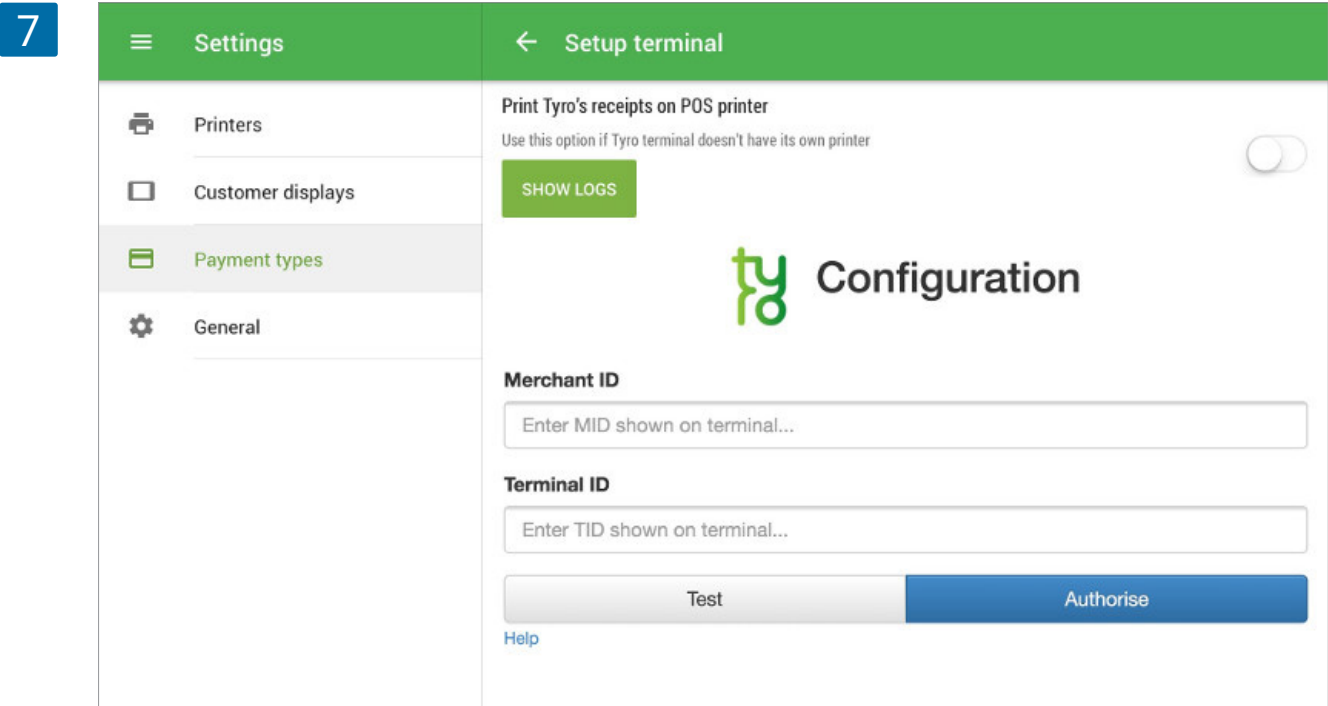


If your Tyro Terminal does not have a printer, you can choose the option ‘Print Tyro’s receipt on POS printer’ to print card transaction receipts.

Follow the instruction on your Tyro Terminal and tap ‘Next’.

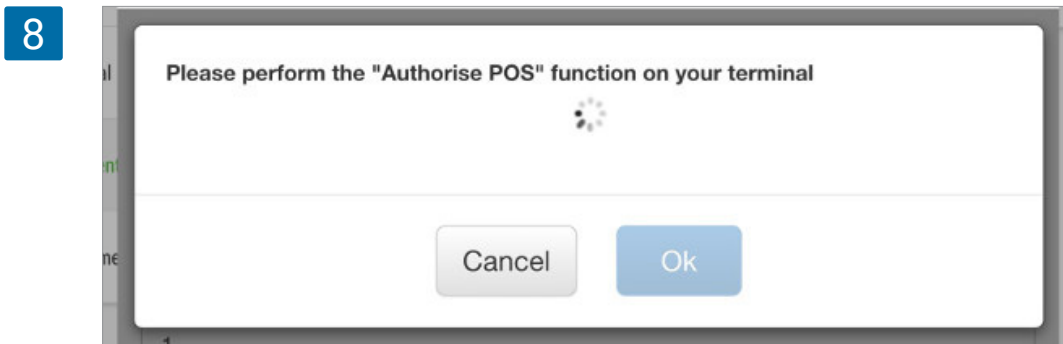


Enter ‘Merchant ID’ and ‘Terminal ID’ displayed on your Tyro Terminal screen. Then tap ‘Authorise’.

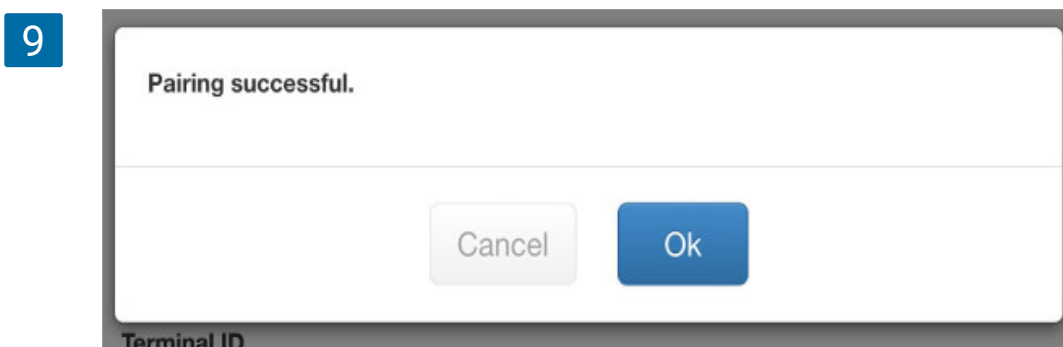




Follow the instructions on the dialog screen, perform the 'Authorise POS' function on your terminal, and then press 'OK'.



You will see a message indicating the successful connection of your terminal. Tap 'OK'.



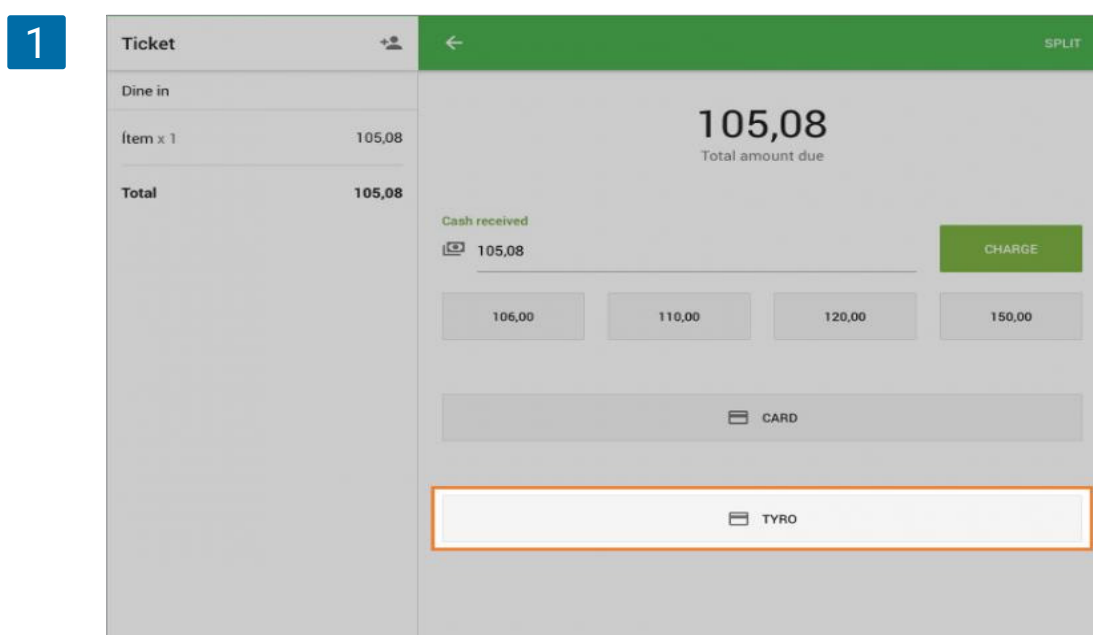
Now you are ready to accept card payments.

## 10.5.2 Processing Payments

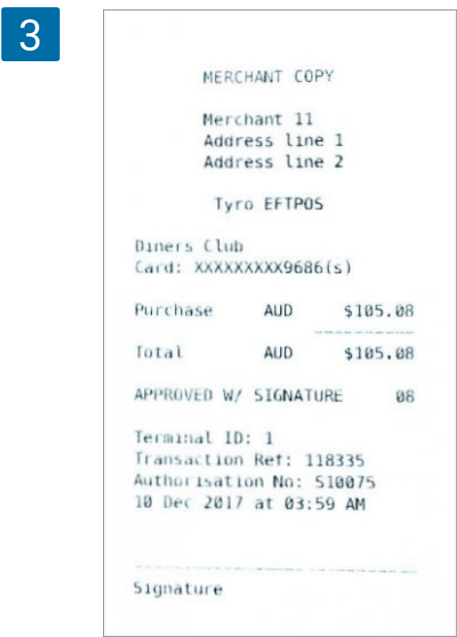
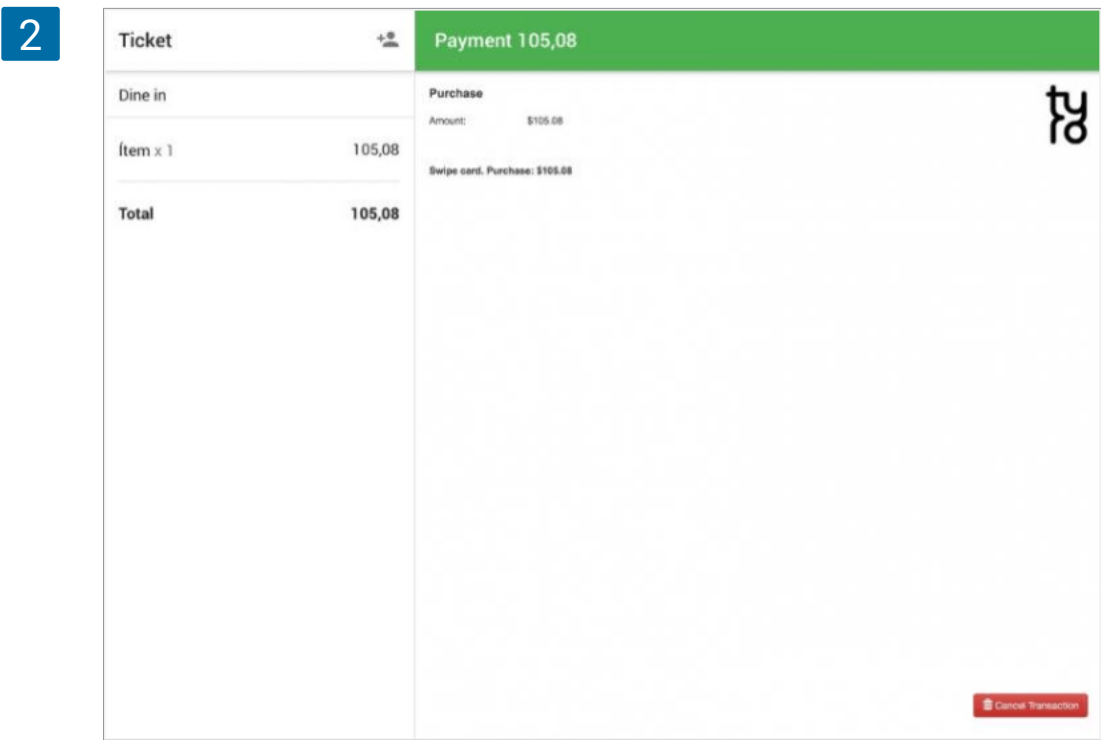
### Payment

Add items to the ticket and press 'Charge'.

Tap the Tyro payment type.

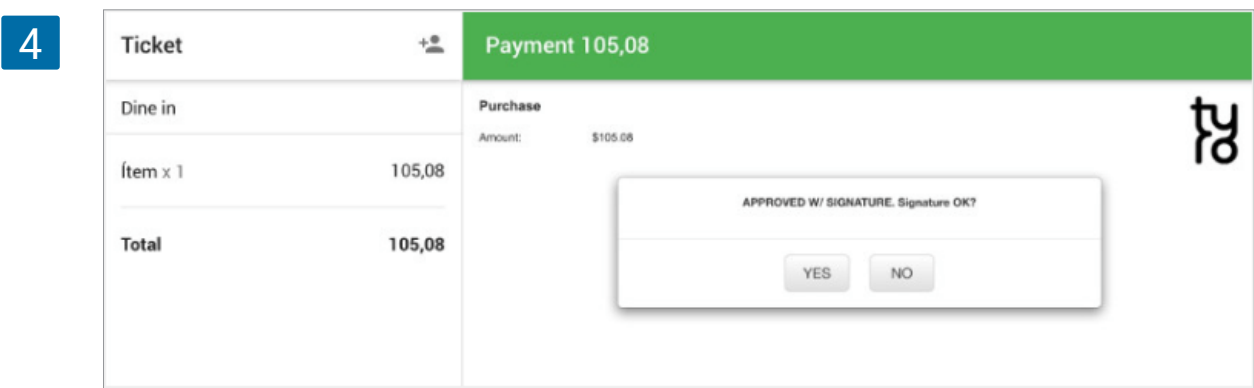


Loyverse POS will transfer the data to the terminal, and you will see an invitation to swipe the card.



After you swipe the card, if the transaction is successful, your printer will print the merchant copy of the payment receipt.

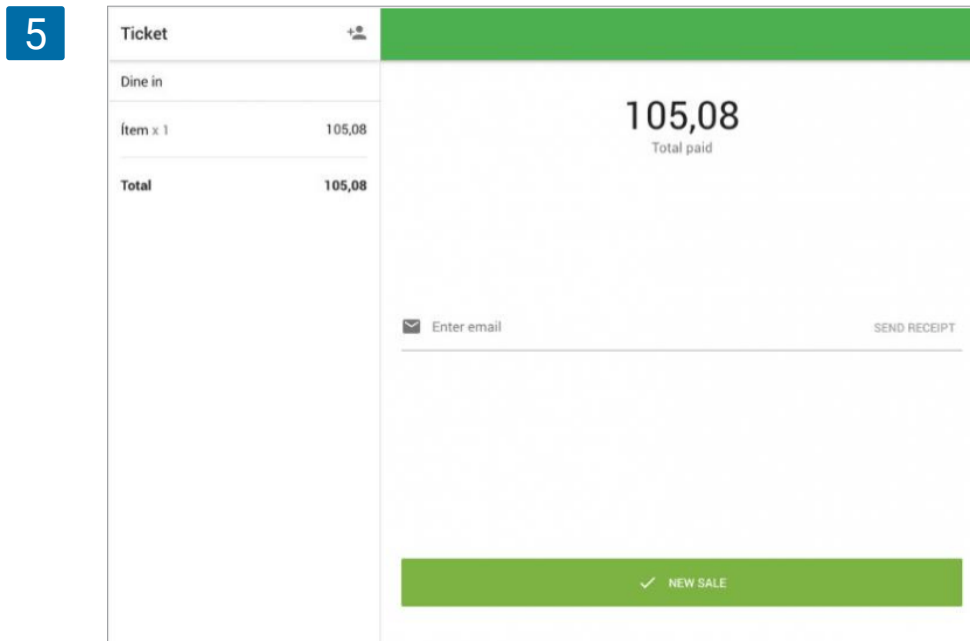
Hand it to the customer for their signature. If you approve the signature, tap the 'Yes' button on the Loyverse POS screen.



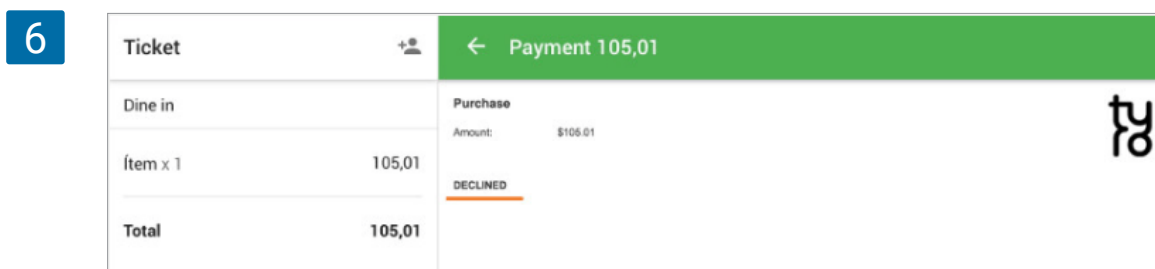
If the card requires a PIN, hand the card reader to the customer for them to enter their PIN.

Then the customer copy of the payment receipt will be printed.

Loyverse POS will display the screen with "Total paid" amount.



In case of an error in the transaction, Loyverse POS will show an error message.

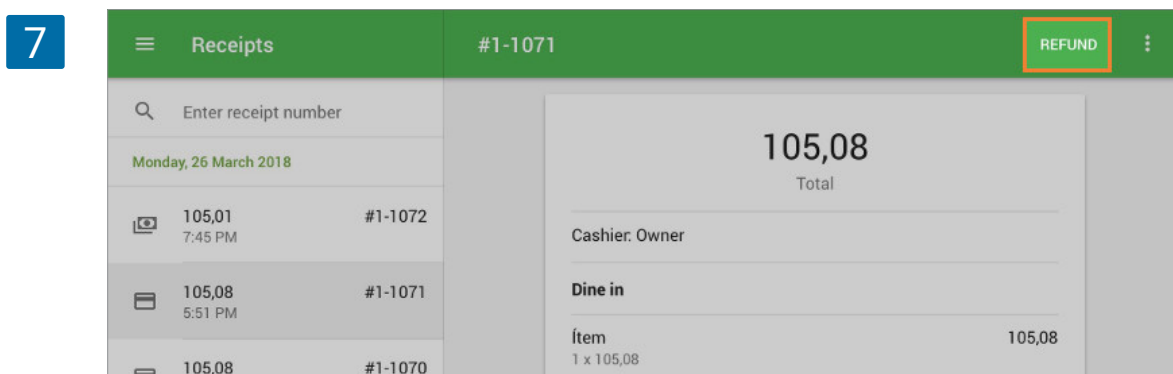


Tap the back arrow to return to the selecting payment type screen. You can ask the customer to choose a different type of payment (for example 'Cash') or try another card.

## Refund

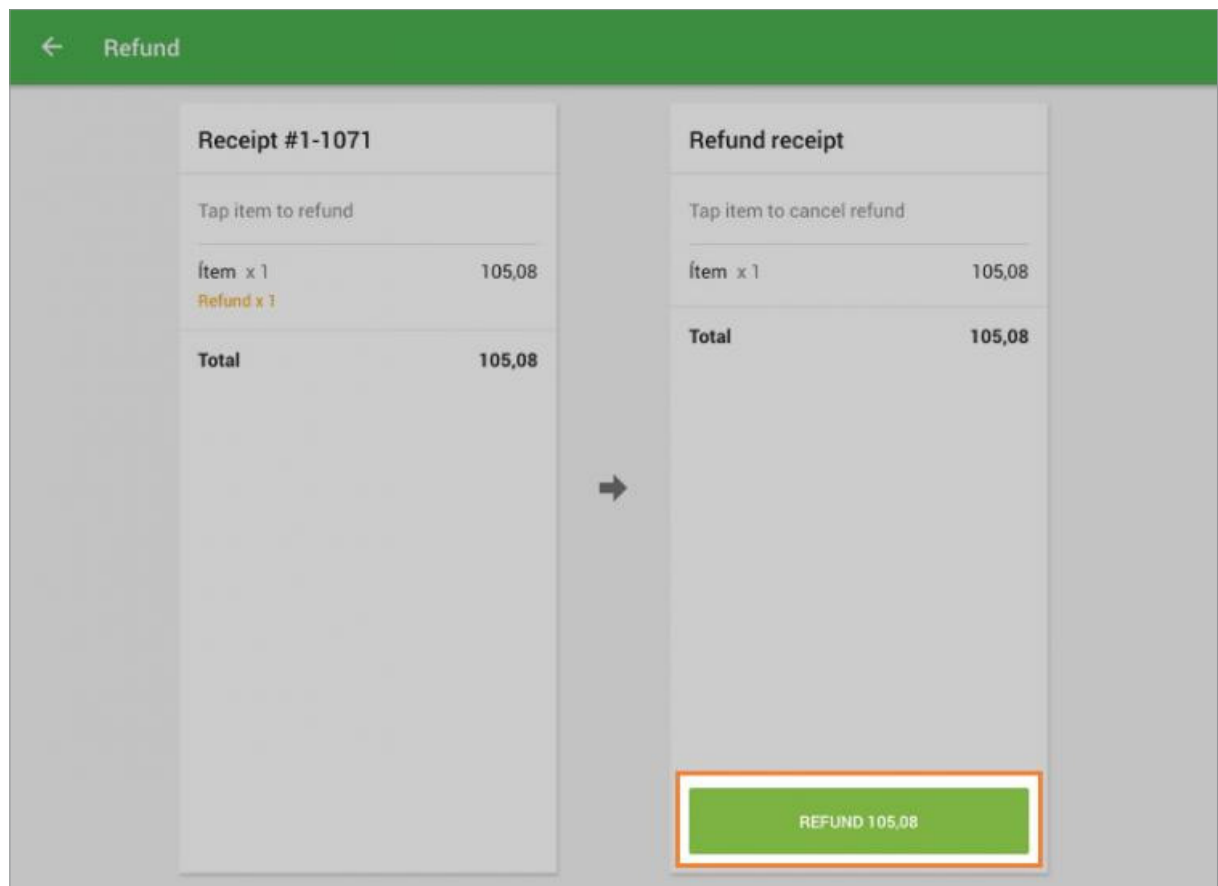
You can refund the ticket fully or partially.

In Loyverse POS, go to 'Receipts' menu, and tap on the receipt you would like to refund. Tap 'Refund'.



Tap on the items you would like to refund from the left ticket to move them to the 'Refund receipt' list on the right side, and then tap the 'Refund' button.

8



Follow the instructions on the 'Refund' screen to complete the refund.

## Reports

You can view the total number of transactions performed with the Tyro payment type. In the Back Office, select the 'Sales by payment type' report.

9

Sales by payment type						
	<	22 May 2021 - 28 May 2021	>	All day	All stores	All employees
EXPORT						
Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount	
Card	139	26,230.20	0	0.00	26,230.20	
Cash	187	25,630.84	3	62.24	25,568.60	
Cash rounding	23	0.90	0	0.00	527.90	
Sumup	18	703.67	0	0.00	703.67	
Tyro	1	7.49	0	0.00	7.49	
Total	345	52,572.20	3	62.24	52,509.96	

## 10.6 How to Accept Credit Cards with Loyverse POS and Smartpay

**This feature only works on iOS devices.**

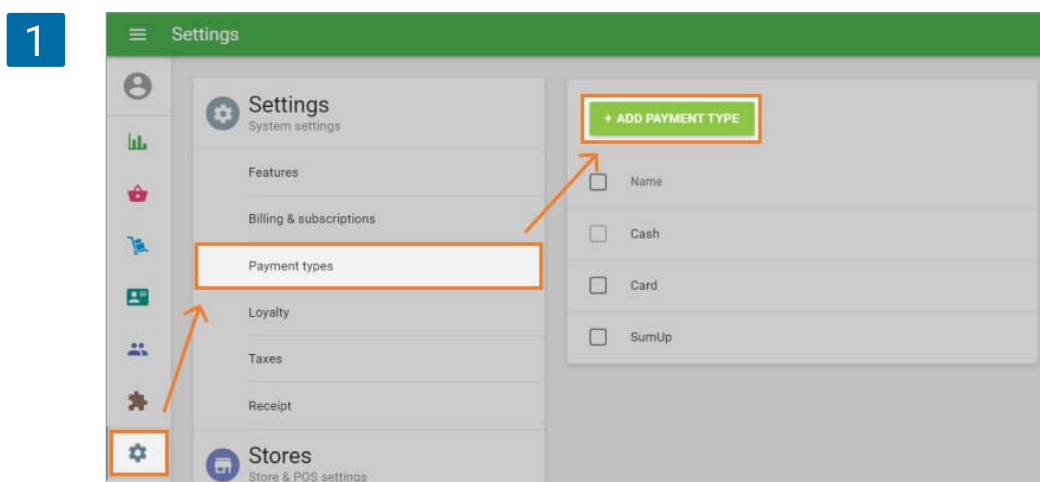
Loyverse POS merchants can [accept credit card payments via Smartpay](#), and it is available to customers in

in Australia and New Zealand.

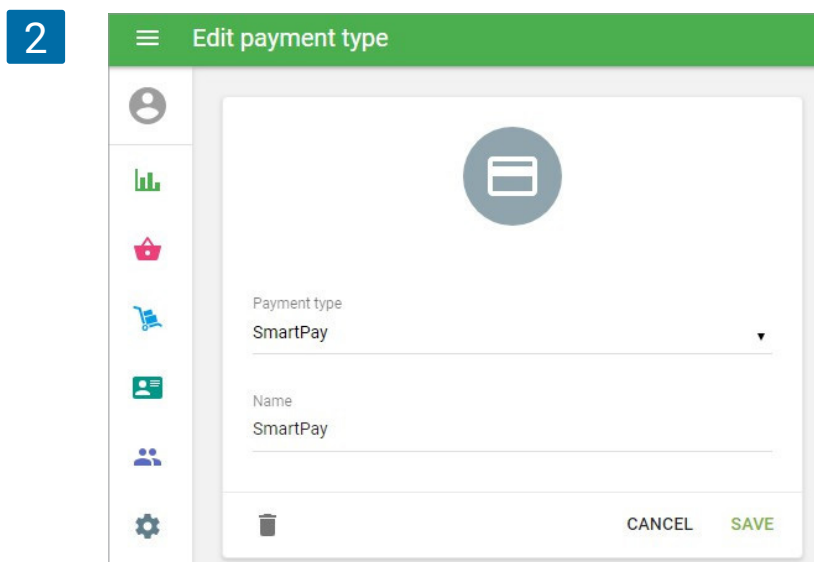
Before connecting a terminal, you need to create an account in Smartpay and receive the device. Integration with Loyverse POS works on the terminals S800 and S920 for New Zealand and D210e for Australia.

### 10.6.1 Connecting the terminal

Log in to the Back Office, click on the 'Settings' menu and then 'Payment types'. Click on the '+ Add payment type' button to add a new type of payment.



In the 'Add Payment Type' window, select the 'Smartpay' payment type from the drop-down list. Save your changes when done.

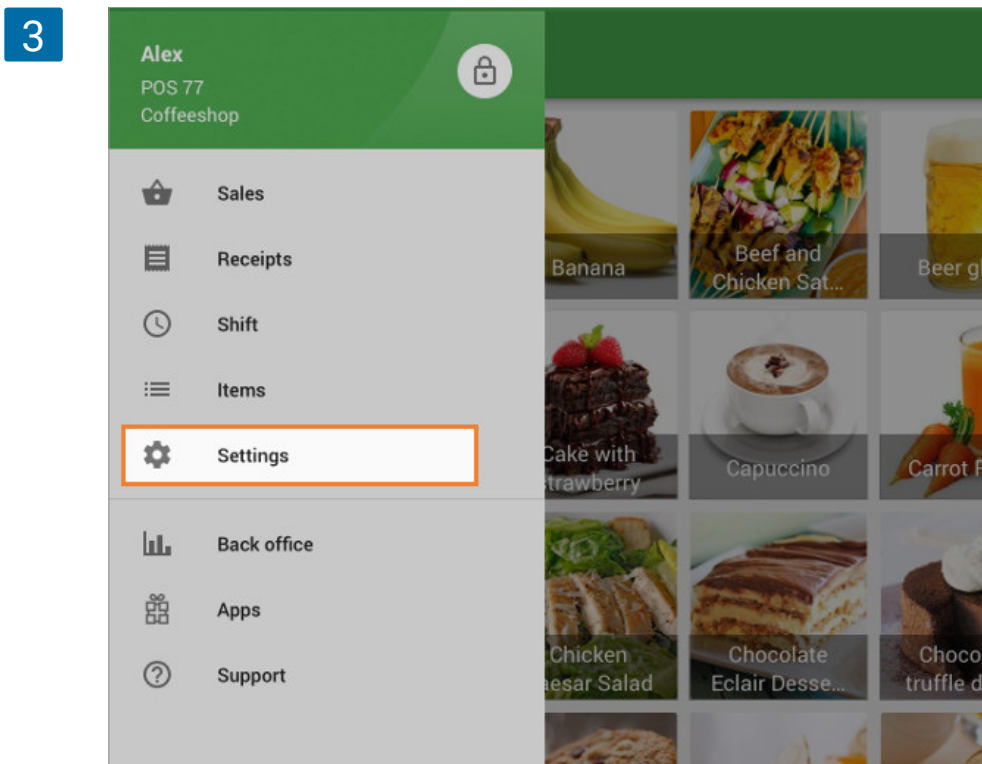


Turn on your Smartpay terminal and connect it to the Internet.

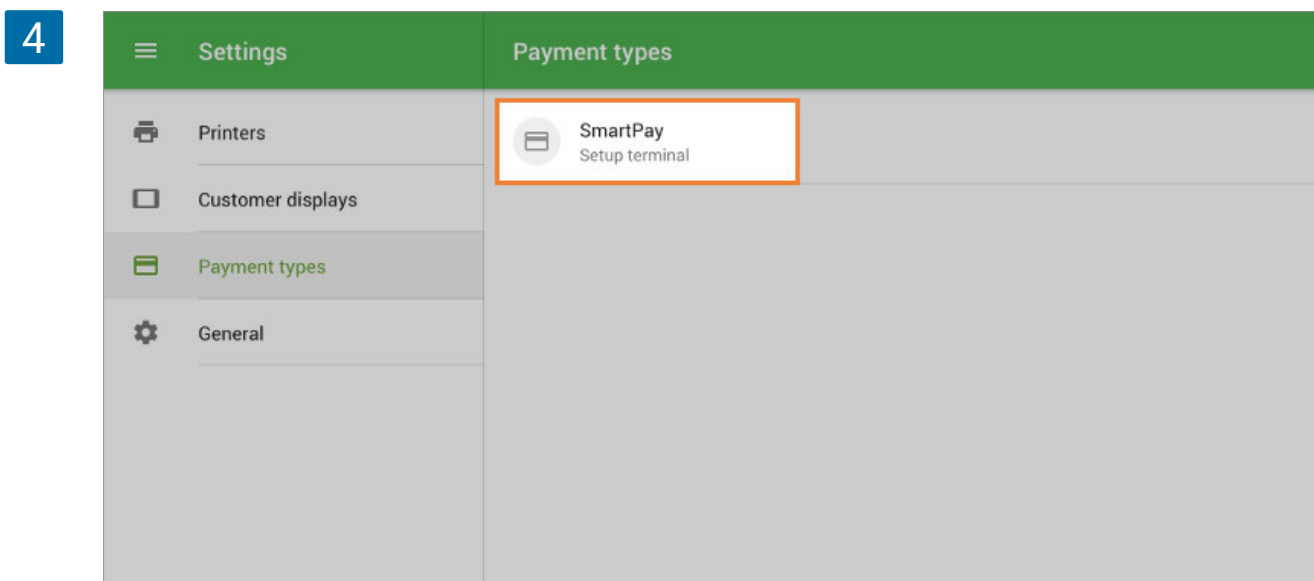
Get the pairing code from the terminal:

*At the terminal, go to the section 'Smart Connect EFTPOS' - it should be in 'Online' mode. Press Menu and select option 3 CONFIG and enter 833767. Then press the Enter button. Select option 1 POS INTEGRATIONS and then 1 AUTHORISE POS. You will see a new pairing code.*

Then launch the Loyverse POS and go to Settings > Payment Types.

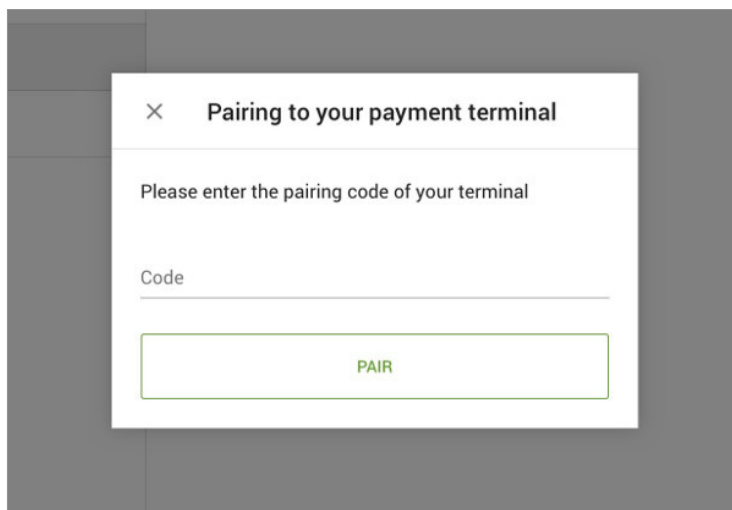


Tap the 'Smartpay' button for account settings.



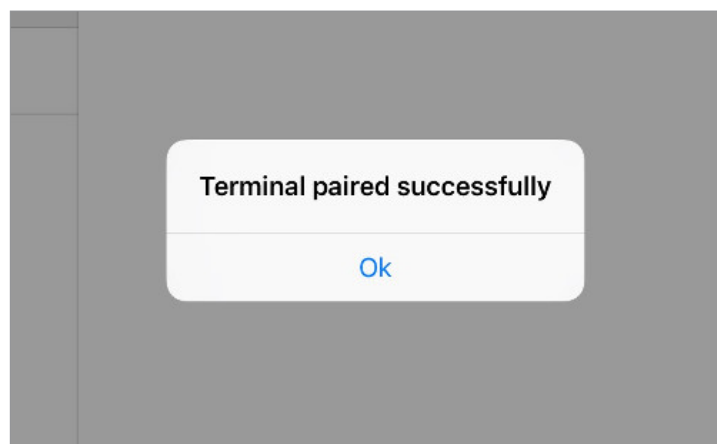
Enter your pairing code from the terminal and tap 'Pair'.

5



Tap 'OK' to confirm pairing.

6



On the terminal, you have to return to the 'Smart Connect EFTPOS' section. It should be shown that the terminal is in 'Online' mode.  
Now you are ready to accept card payments.

## 10.6.2 Processing Payments

### Payment

Add items to the ticket and press 'Charge'.

Tap the 'Smartpay' button as the payment type.

1

Ticket		← SPLIT	
Dine in		<div>13.20</div> <div>Total amount due</div> <div>Cash received</div> <div>  13.20           <div>CHARGE</div> </div> <div> <div>14.00</div> <div>15.00</div> <div>20.00</div> <div>50.00</div> </div> <div>CARD</div> <div>SMARTPAY</div>	
Cheesecake x 1	12.00		
Tax	1.20		
Total	13.20		

Loyverse POS will wait for a response from the terminal, and you will see an invitation to insert/swipe card on the terminal.

2

Ticket		Payment	
Dine in		<div>13.20</div> <div>Total amount due</div> <div> </div> <div>Please follow the instructions on the terminal</div>	
Cheesecake x 1	12.00		
Tax	1.20		
Total	13.20		



If the transaction is successful, Loyverse POS will display the total paid amount on the screen, where you may then print the receipt, send the receipt to your email, or go to the new sale.

3

Ticket

+

Dine in

Cheesecake x 112.00

Tax1.20

Total13.20

13.46

Total paid  
(13.20 + 0.26 surcharge)

Enter email

SEND RECEIPT

✓ NEW SALE

In case of an error in the transaction, Loyverse POS will display an error message and print the receipt for the canceled transaction.

4

Ticket

+

Dine in

Cheesecake x 112.00

Tax1.20

Total13.20

← Payment

13.20

Total amount due

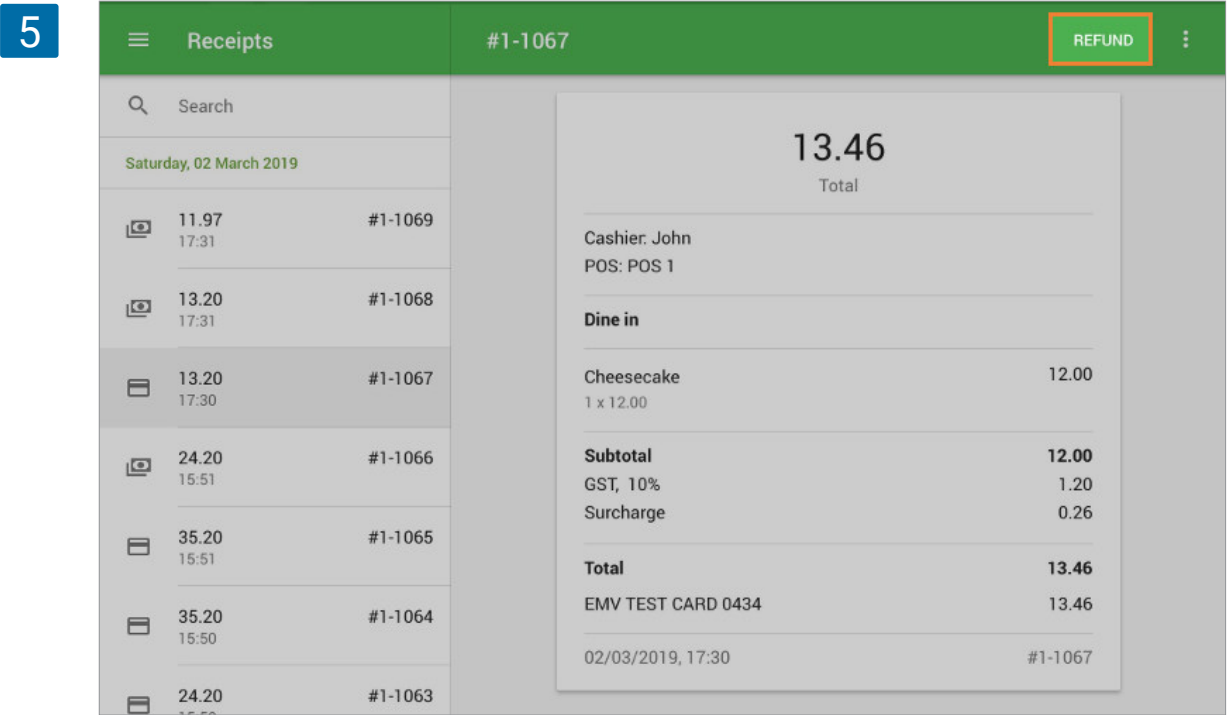
Payment declined  
Transaction cancelled

You can 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.

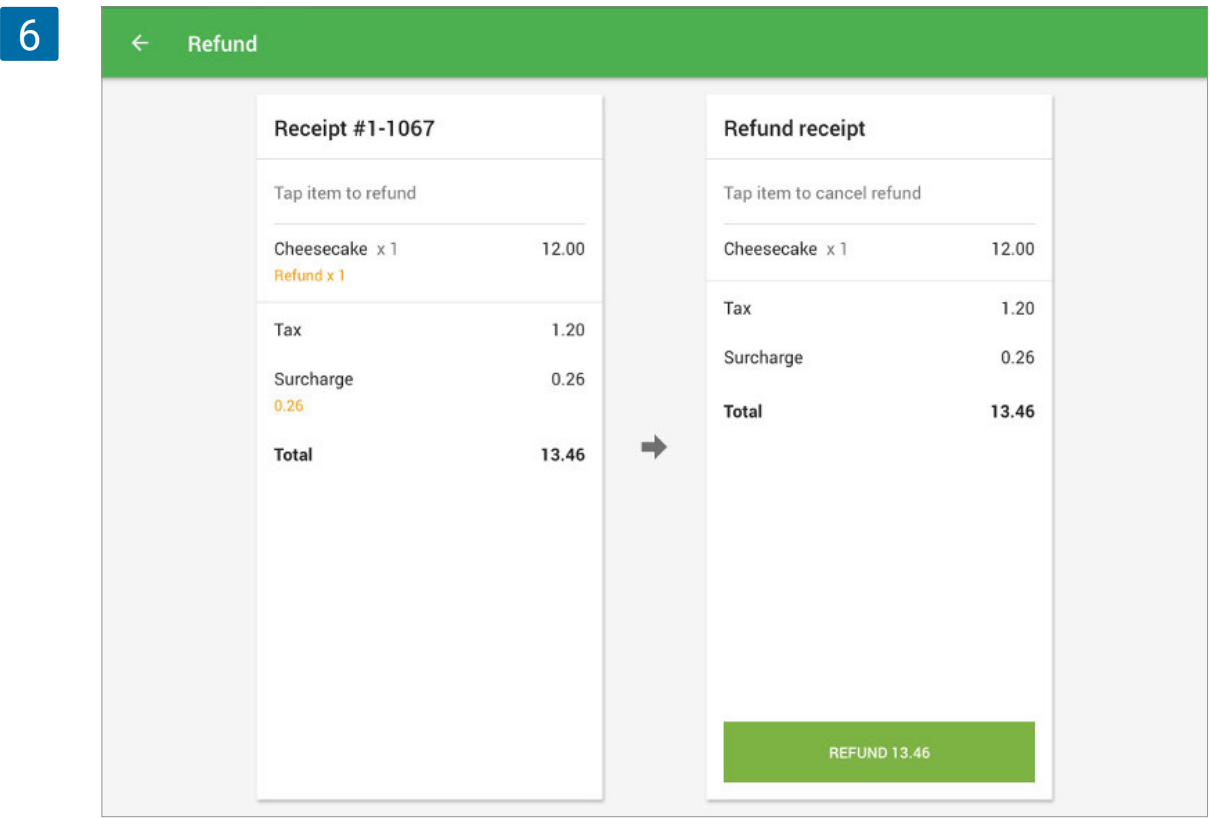
Refund

You can only refund the whole amount of the transaction. The terminal 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'.

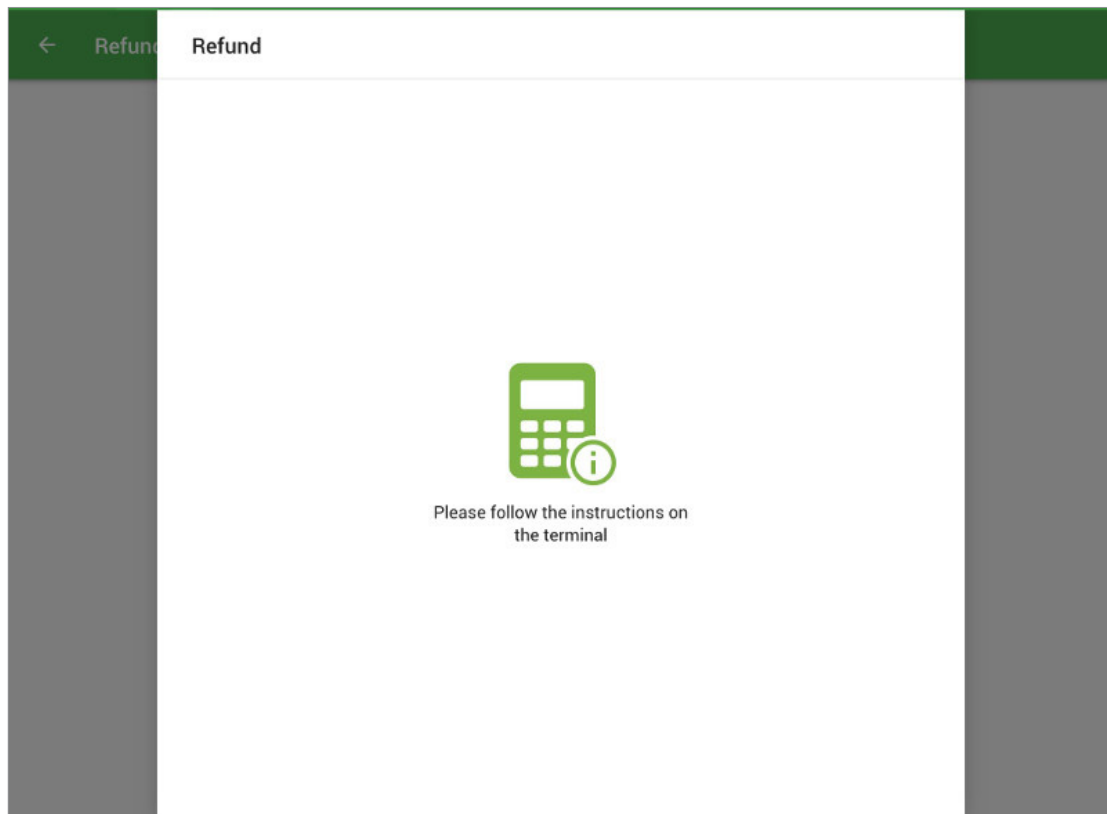


Select all items on the receipt that were paid via card (on the left side) to move them to the 'Refund receipt' list (on the right side), and tap the 'Refund' button.



Follow the instructions on the terminal screen: swipe the manager card, enter the pin code, then insert the chip of the customer's card into the slot or swipe at the card reader.

7



## Reports

You can view the total number of transactions performed with Smartpay. In the Back Office, select the 'Sales by payment type' report.

8

Sales by payment type					
<div>&lt; 4 Feb 2019 - 5 Mar 2019 &gt; All day All employees</div>					
EXPORT					
Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	6	129.48	0	0.00	129.48
Cash	16	252.57	4	42.00	210.57
SmartPay	73	2 475.04	16	541.65	1 933.39
Total	95	2 857.09	20	583.65	2 273.44

## 10.7 How to Add Tips to Payments Made through Card Readers

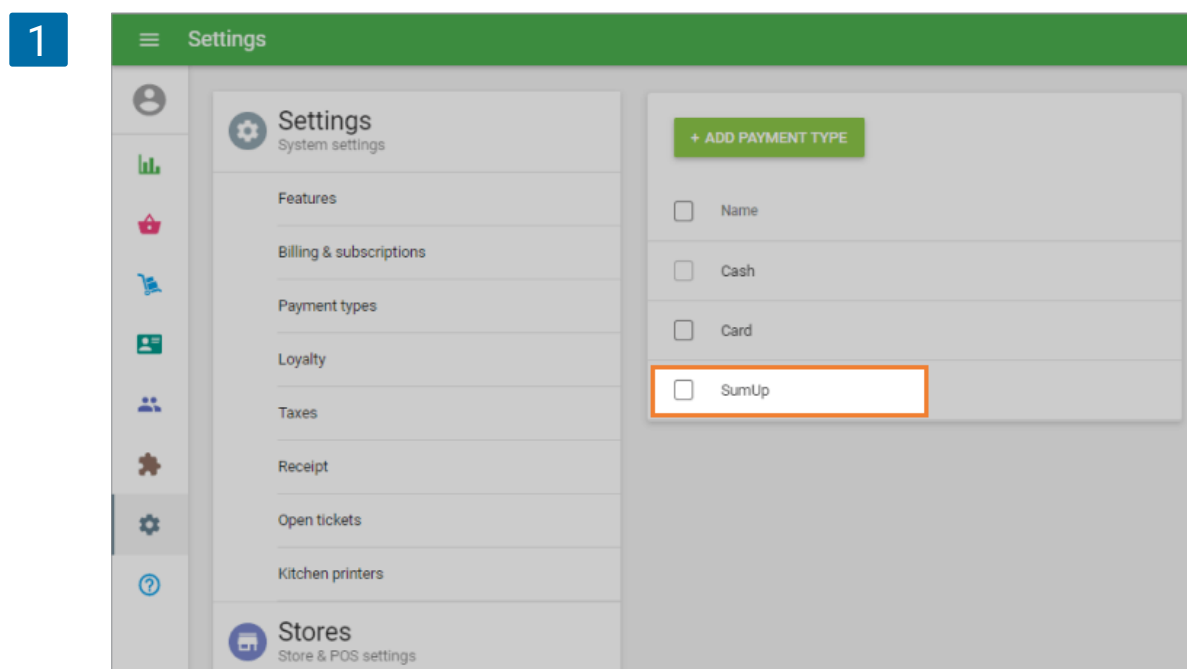
For some of the card processing systems integrated with Loyverse POS, there is the possibility to set up tips that the customers can add to the payments.

Currently, this functionality is available for SumUp, PayPal Zettle, Yoco, and KICC card readers. (For Yoco and KICC card readers currently only for iOS devices).

### 10.7.1 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.



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

**Edit payment type**

Payment type  
SumUp

Name  
SumUp

Account 'loyverseuk@sumup.com' connected. [Disconnect](#)  
To configure card reader go to the settings menu in the Loyverse POS app.

**Collect tip**  
Available only with Loyverse POS for iOS v. 2.18 or newer

Tip value 1, % \*  
10.00

Tip value 2, % \*  
15.00

Tip value 3, % \*  
20.00

**Allow custom tip amounts**

CANCEL **SAVE**

Save your changes when done.

# 10.7.2 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

Ticket		←	
Fried chicken x 2	89.00	<div>218.22</div> <div>Total amount due</div> <div>Add a tip</div> <div><div>10% 21.82</div><div>20% 43.64</div><div>30% 65.46</div></div> <div>CUSTOM TIP AMOUNT</div> <div>NO TIP</div>	
Americano x 1	15.00		
Caesar Salad x 2	60.00		
Hamburger x 2	36.00		
Kiwi cocktail x 1	12.00		
Discounts		9.00	
Tax		15.22	
Total		218.22	

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

Ticket		←	
Fried chicken x 2	89.00	<div>303.68</div> <div>Total amount due (283.68 + 20.00 tip)</div> <div>Tip amount 20.00</div> <div>CHARGE</div>	
Americano x 1	15.00		
Caesar Salad x 2	60.00		
Hamburger x 2	36.00		
Kiwi cocktail x 1	12.00		
Discounts		9.00	
Tax		15.22	

1

2

3

4

5

6

7

8

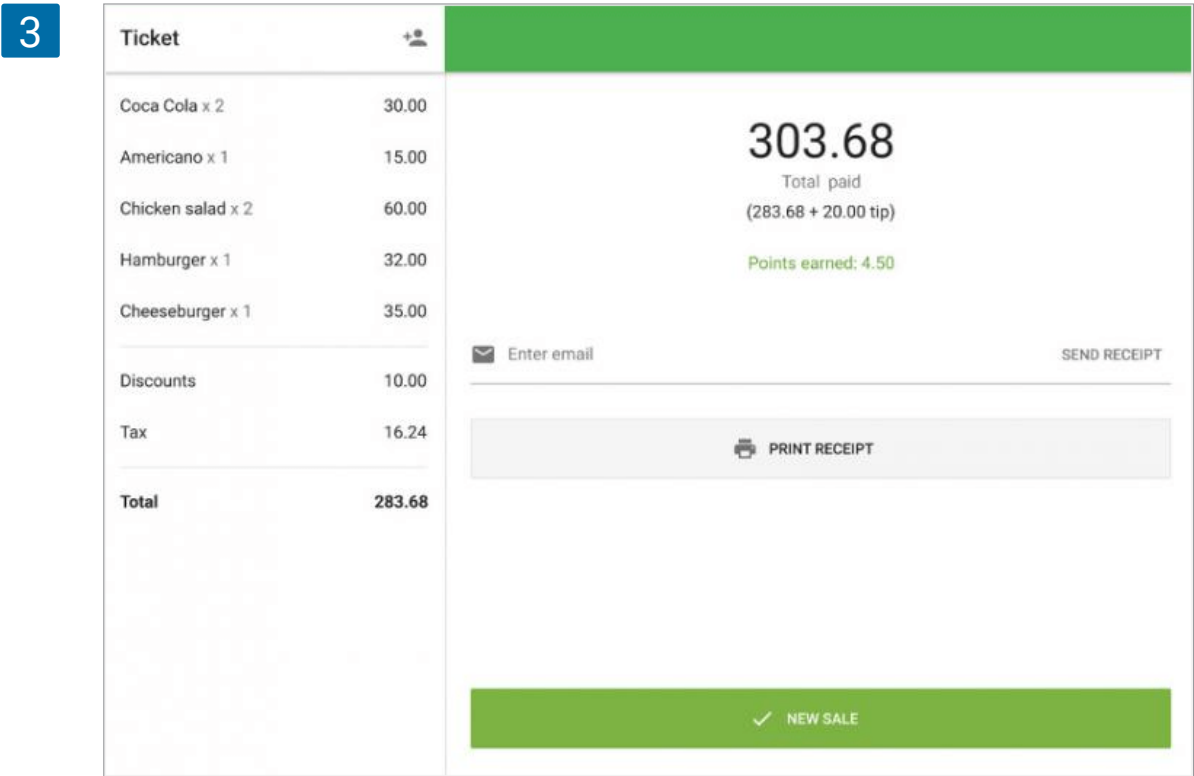
9

⌂

0

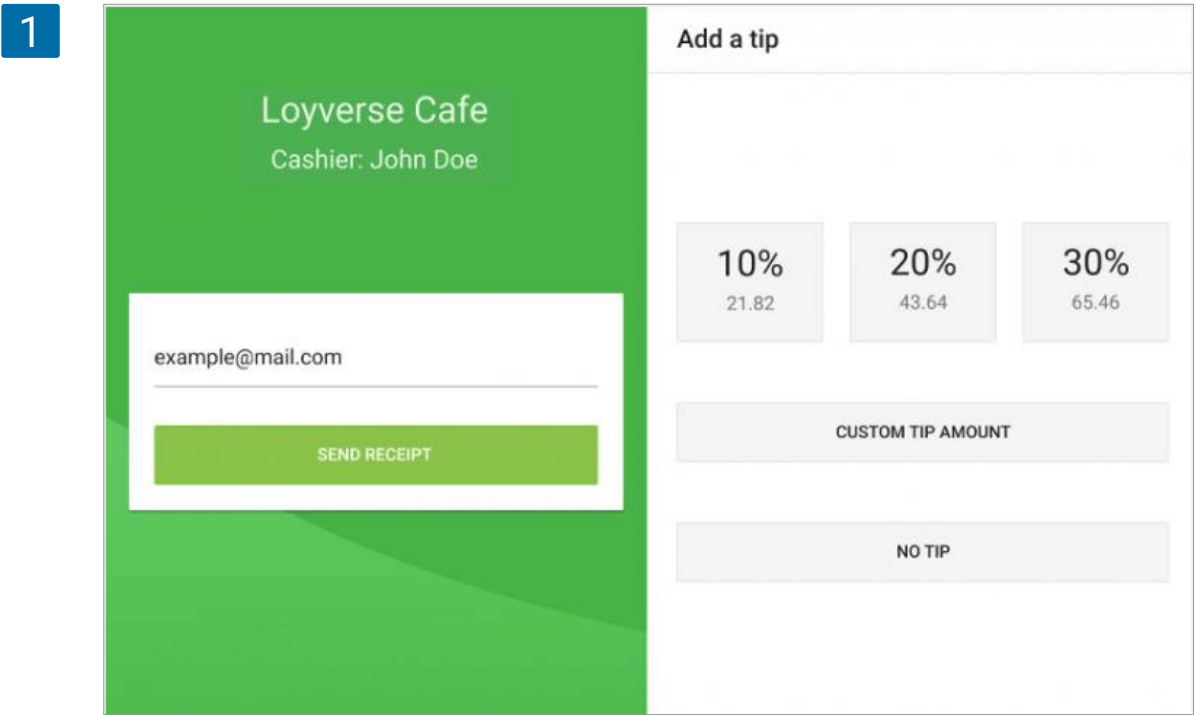
Next

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.



### 10.7.3 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.



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

Loyverse Cafe

Cashier: John Doe

example@mail.com

SEND RECEIPT

← Enter tip amount

20.00

PAY 895.39

1

2

3

4

5

6

7

8

9

After finishing the transaction, the receipt information with tips will be shown.

3

Loyverse Cafe

Cashier: John Doe

example@mail.com

SEND RECEIPT

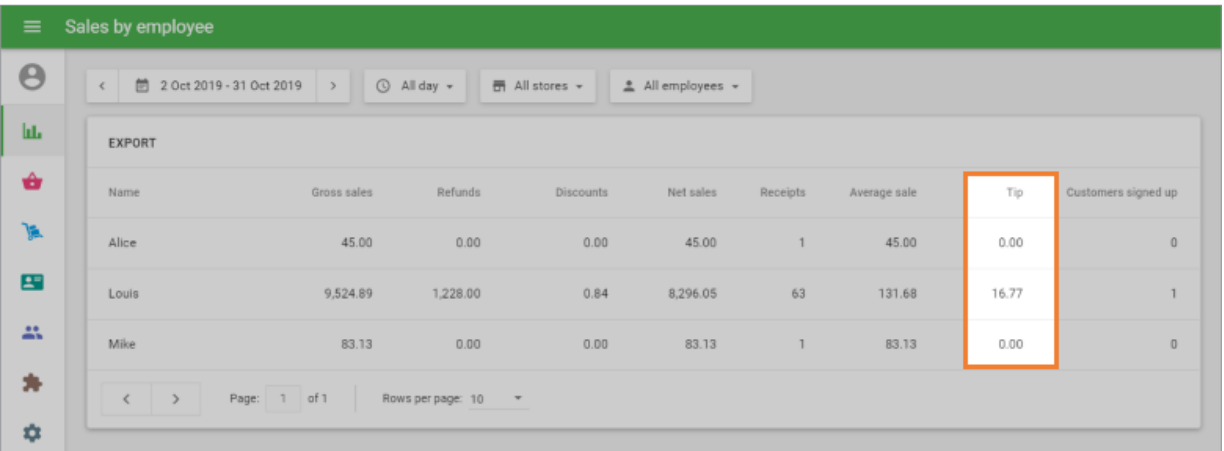
Ticket	Takeout
Icecream sandwich x 1	15.00
Jelly bean x 1	15.00
Ice cream x 1	15.00
Pancake x 1	15.00
Coffee x 1	15.00
Vanilla, Milk	
Subtotal	75.00
Taxes	4.88
Tip	20.00
Total	99.88
Remaining	49.94



## 10.7.4 Tips at Reports

You can also see the total amount of tips per employee in the Sales by Employee Reports in the Back Office.

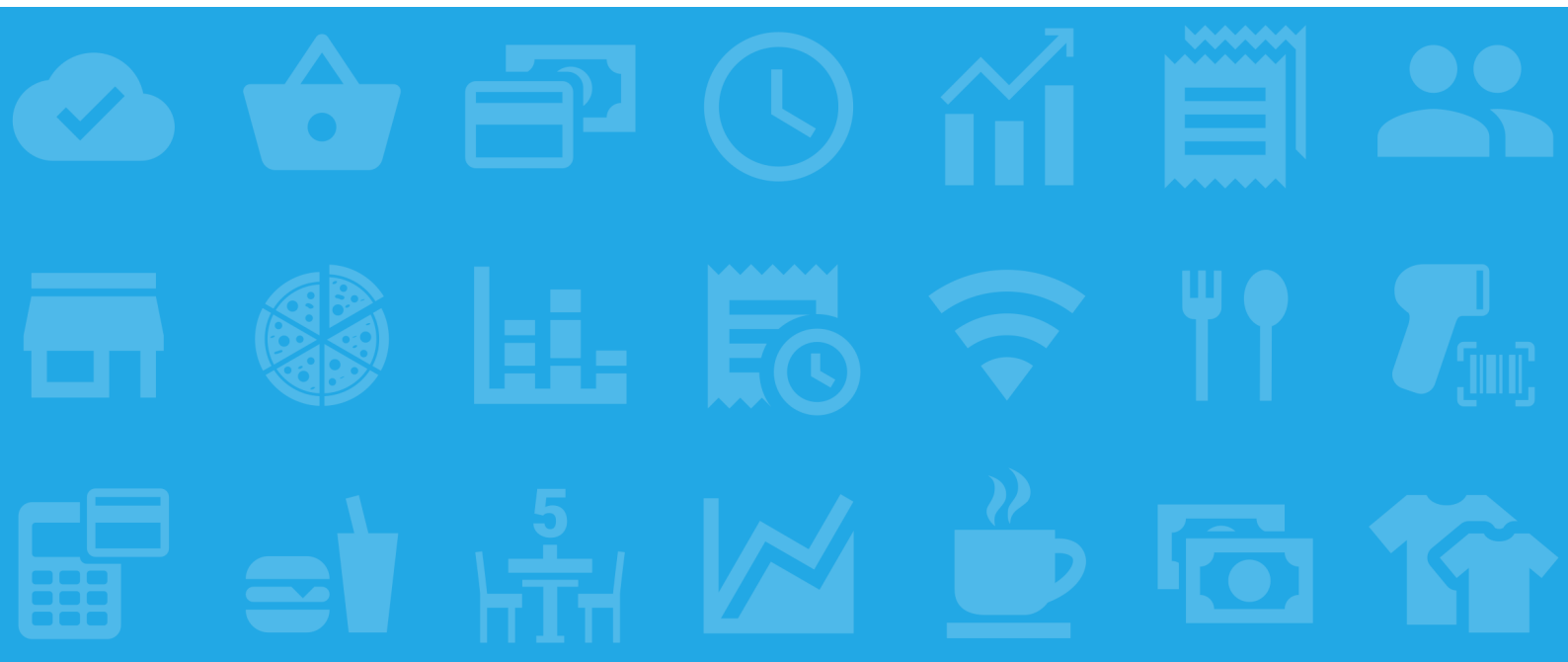
1



Name	Gross sales	Refunds	Discounts	Net sales	Receipts	Average sale	Tip	Customers signed up
Alice	45.00	0.00	0.00	45.00	1	45.00	0.00	0
Louis	9,524.89	1,228.00	0.84	8,296.05	63	131.68	16.77	1
Mike	83.13	0.00	0.00	83.13	1	83.13	0.00	0

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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