POINT OF SALE/POS INVOICE SETUP

A POS Invoice is an abbreviated version of the regular agrē invoice that's designed for speed! You can use a barcode scanner to quickly enter items onto the invoice, take the customer's payment, and print the till-tape receipt. Even without a barcode scanner you'll be able to enter a POS Invoice quickly using special keyboard shortcuts.

POS Invoices are much faster to enter but the trade-off is less flexibility - you aren't able to add blends, or indicate a shipping address, there's no place for flagging purchases as prepaid or selecting a Lot Number (Lot#), you can't link to or import from a loadout ticket or work order, and some payment types may not be acceptable.

POS Invoices are formatted to print on "till-tape" instead of on an 8½ x 11 sheet of paper (but there is a way to print them like regular invoices on the fly if you need to).

What you'll find:

Setup (one-time tasks)

Installing the Hardware

Bar Code Scanner

Before you open up agrē, you'll need to have the barcode scanner connected to your computer with the latest drivers installed.

Receipt Printer Installation

While you can use most thermal printers to print the receipts, the POS Invoice *Cash Drawer* functionality is compatible only with the following **Epson Thermal Line** receipt printers:

• TM-T20	• TM-T20II	• TM-T20II-m	• TM-T70
• TM-T70II	• TM-T81II	• TM-T82	• TM-T82II
• TM-T88V	• TM-T90II	• TM-P20	• TM-P60
• TM-P60II	• TM-P80	• TM-U220	• TM-U330
• TM-m10	• TM-m30		

The printer driver must be installed before Citrix is opened as all drivers are loaded on launch. The driver should be supplied with the receipt printer itself, but if not Epson drivers can be downloaded from the following webpage:

   https://c4b.epson-biz.com/modules/pos/index.php?page=soft&scat=31

The screenshots here are for the **Epson TM-88V**, but the setup process is similar for most thermal printers.

Accessing the printer settings after the installation of the driver requires the printer to then be *registered* using an application that was installed with the driver software.

If not prompted to register at the end of the driver installation, it can be accessed from the Windows Start Menu in the **Epson Advanced Printer Driver folder**.
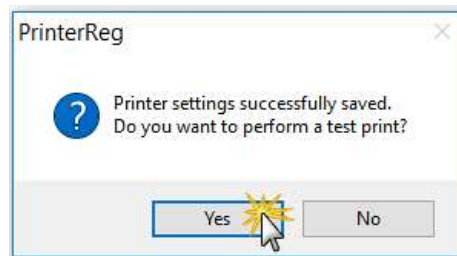Click on **EPSON APD5 - Register, change, or delete TM Printer**.
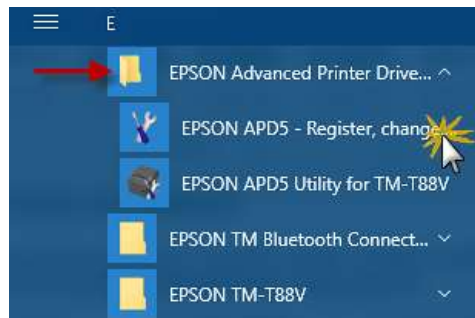
The **Register, Change and Delete Printer** window opens.
Select the printer model and port type, then Save Settings.
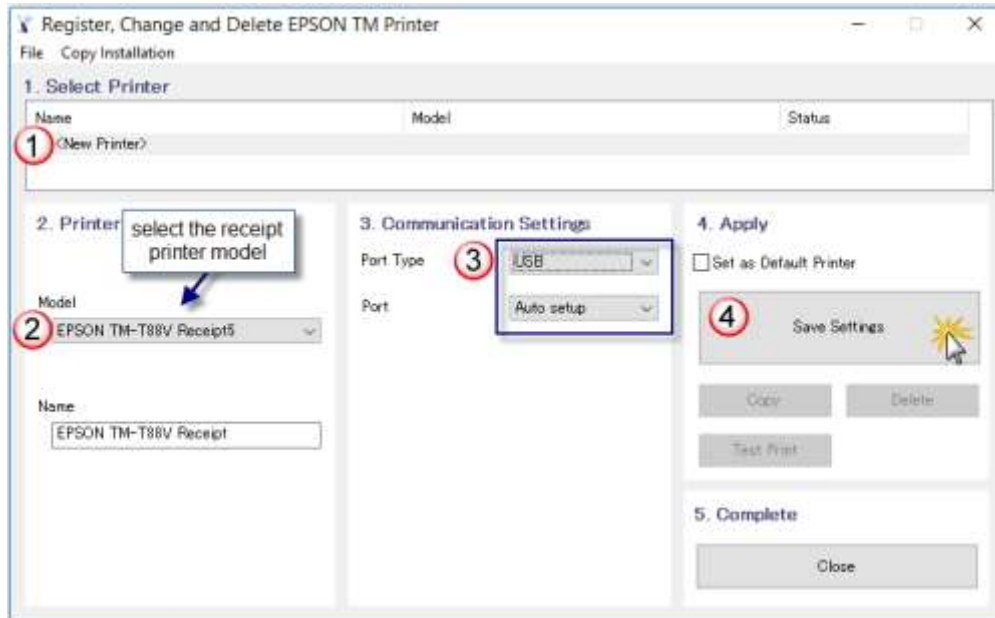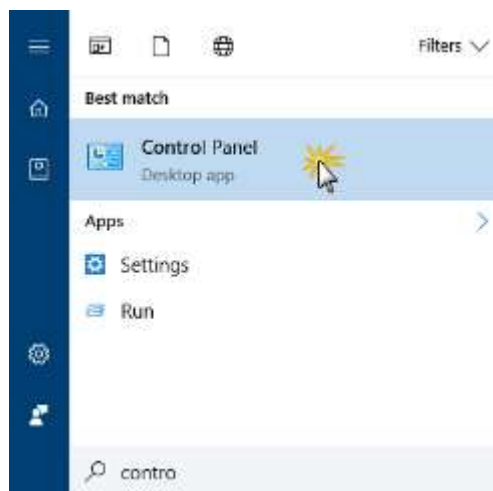

After Save Settings is complete, you'll be prompted to perform a test print – click **Yes**.

After test print is successful **Close** the window.

Next up is setting the printing preferences for the Thermal Line printer to enable some additional options.

Navigate to your **Control Panel** in Windows …

… and select **Devices & Printers**.
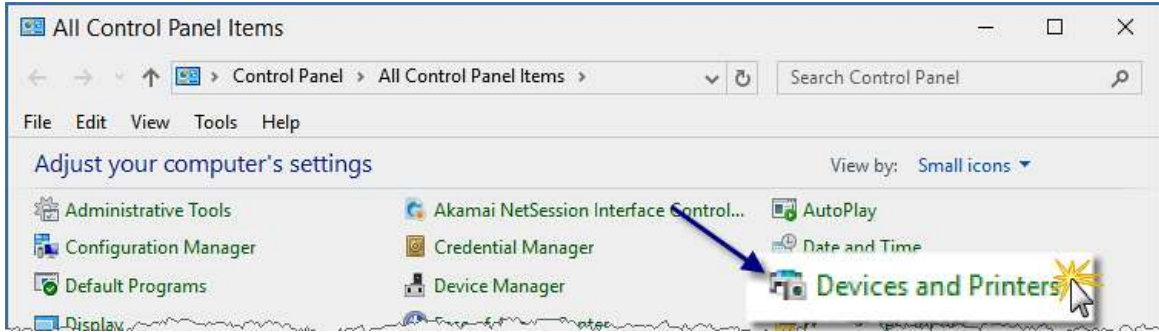
Right-click on the receipt printer and select **Printing preferences**.

The Receipt Printing Preferences window should look very similar to this one (depending on your model of printer).

Select the **Feed and Cut** tab.
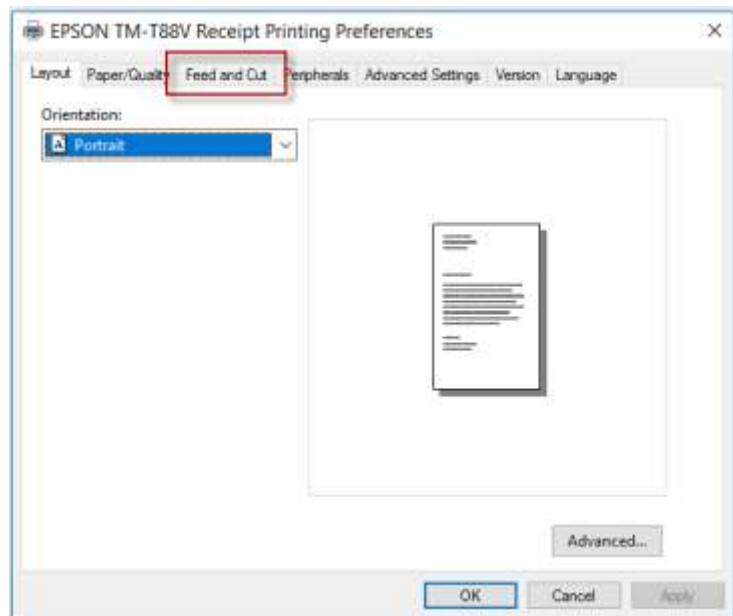
Select **Document [Feed, Cut]** .

Select the **End of Document** sub-tab.

Check the box to **Feed to cut position before cutting**.
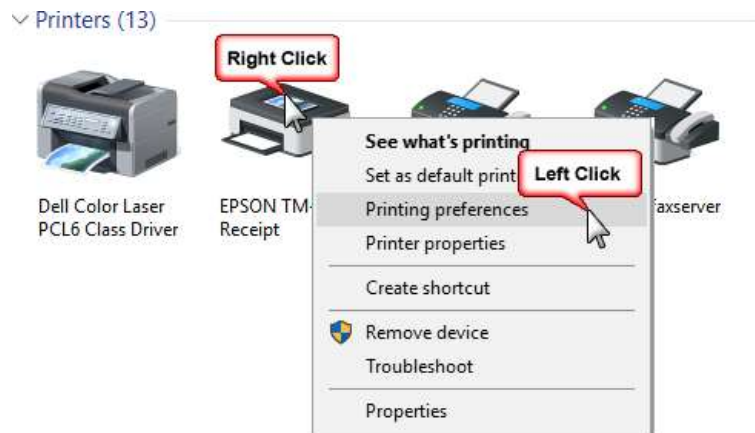
Set the **Cutting method** to Cut.

These settings ensure the printer will cut the receipt *after* all lines have been printed.
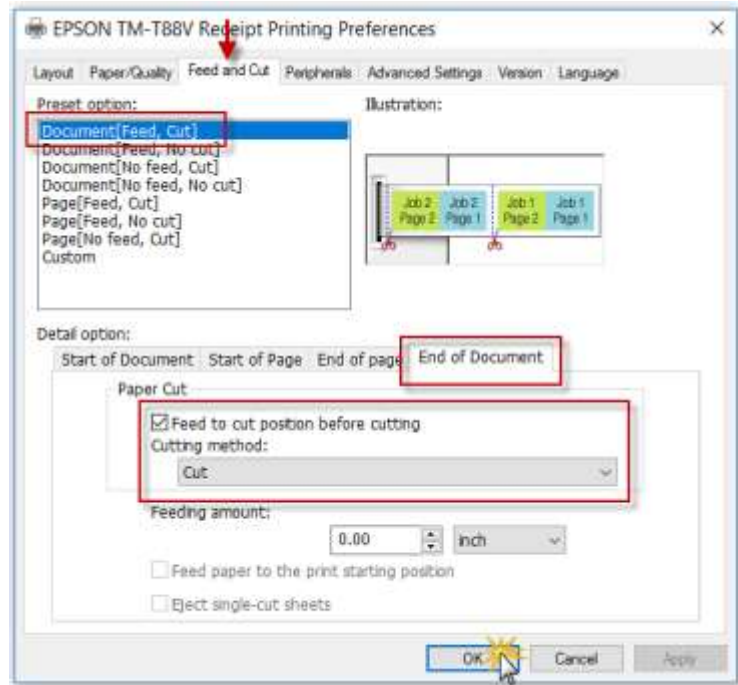
Select the **Peripherals** tab.
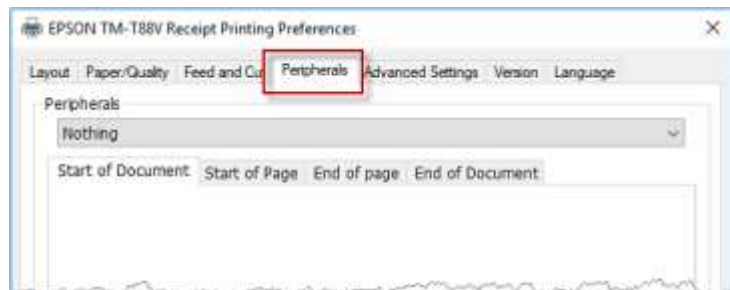
Select **Cash Drawer** from the drop-down list.

Leave the **Start of Document** sub-tab selected.

Set **Cash Drawer #1** and **Cash Drawer #2** to Do not open.

agrē will send the instructions to the printer to have the cash drawer open, so you won't want Windows to open it a second time.
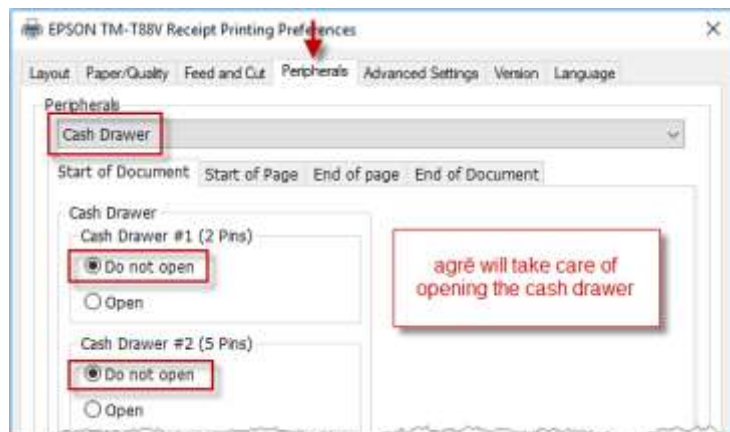
Select **Cash Drawer & Built-in Buzzer** from the drop-down list.

Leave the **Start of Document** sub-tab selected.

Set **Cash Drawer #1** to Do not open.

Set **Built-in Buzzer** to Turn off.

agrē will send the instructions to the printer to have the cash drawer open and play a sound, so you won't want Windows to open it and chime a second time.
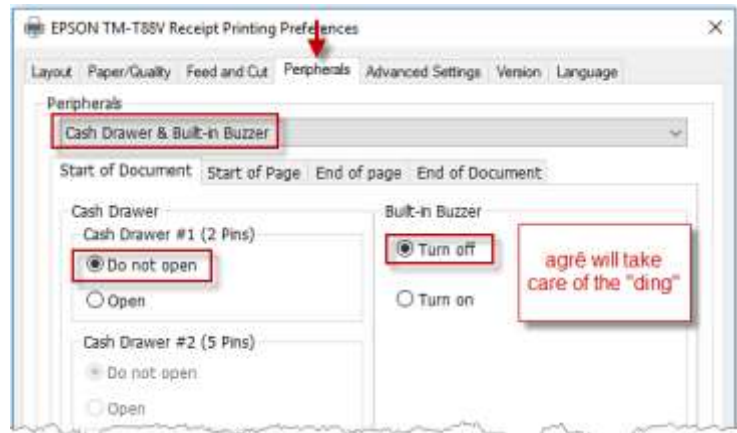
Click **OK** to save the printing preferences and to close the window.

Now that the printer is installed, registered, and setup you can start agrē.

Security Permissions

Before you can setup and use POS Invoices in agrē you'll need permission.
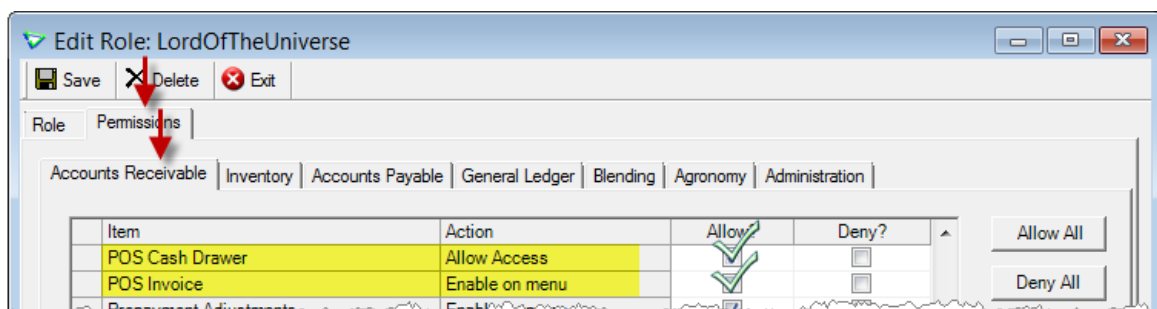
File > Security > Manage Roles

Allow *POS Cash Drawer* permission only if the user should be allowed to **open the cash drawer manually** at any time (if not checked, the cash drawer will still open when accepting a payment type that needs it to open – the user just can't open the cash drawer at will).

Configuration Options

There are a few POS Invoice configuration options that can be set at the **company level**, or at the **user level** (which, as usual, will override the company defaults).

Printers

Now that agrē will be working with two printers, it needs to know which one you'll use for printing *POS Invoices* on till-tape and which one you'll use for printing *Standard Reports* (the 8½ x 11 ones like regular invoices, customer sales, inventory balances, etc.). This can be done at the **company level**, or at the **user level** (which, as usual, will override the company defaults).

Note	When *Quick Print POS* is **checked**, POS Invoices will be sent directly to the receipt printer – they will NOT display on screen before printing.

Company Level
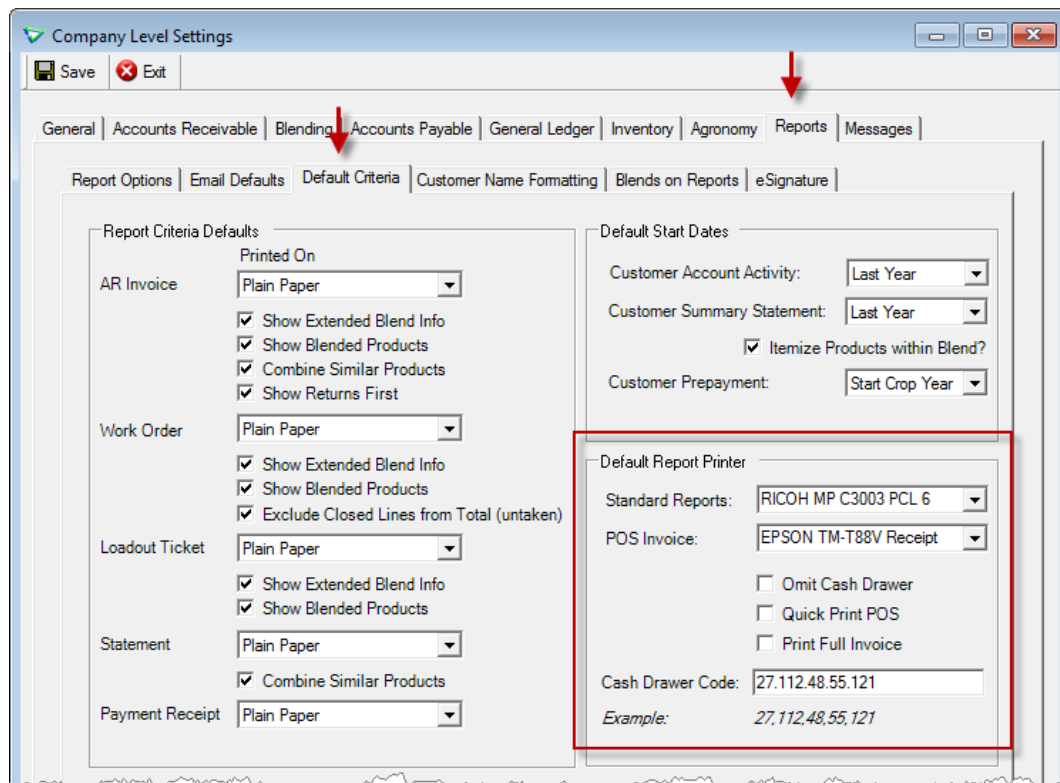
File > Config Options > Company > Reports tab

See Appendix I for Cash Drawer Codes for compatible printers.

Note	Check *Omit Cash Drawer* if a) you are not using a cash drawer, or b) your POS receipt printer is not compatible (as it is the printer that sends the instructions to the cash drawer to open).

User Level
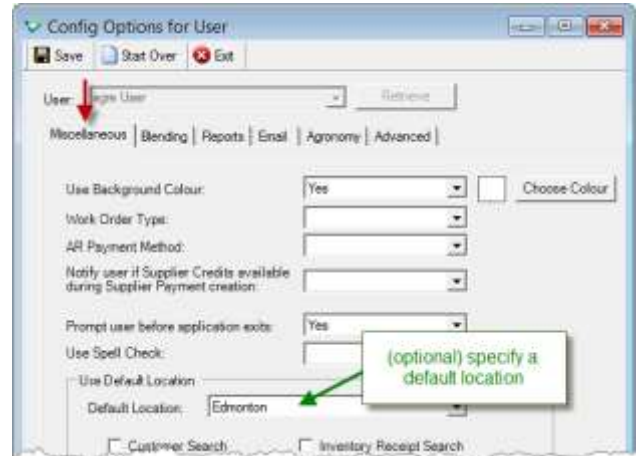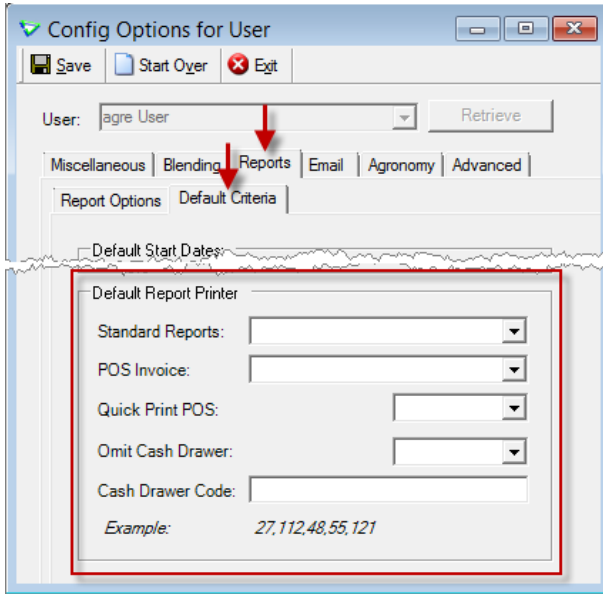
You may also want to set a *Default Location* for users so agrē will fill that in for them on each POS Invoice

File > Config Options > User

Font Size

Select *POS Invoice: Large Fonts* if you'd like the fonts to display a little larger.
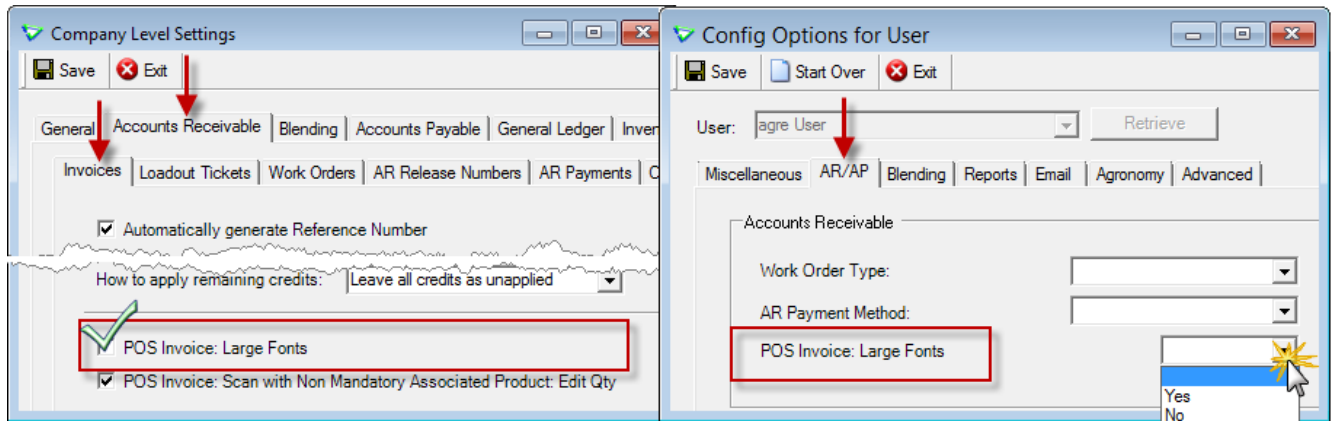
POS Invoice

Regular Font

	Product	Units	Quantity	Unit Price	Taxes	Amount
▶	POP - Canada Dry Cranberry Ginger Ale 355mL	EA	1.0	$1.79	$0.09	$1.88
	DEP355 - DEPOSIT (355 ML)	EA	1.0	$0.10	$0.01	$0.11

Member No: 11123 — Baker, Mike (11123), PO Box 15, Westlock, AB, 780.459.1202
Location: St. Albert — Sales Rep: Bruce Clarkson — Date: Jun 04, 2018

Sub Total $1.89 — Items 2
Tax Total $0.10 — Print Full Invoice
Invoice Total $1.99 — Total (F12)

Large Font

	Product	Units	Quantity	Price	Taxes	Amount
▶	POP - Canada Dry Cranberry Ginger Ale 355n	EA	1.0	$1.79	$0.09	$1.88
	DEP355 - DEPOSIT (355 ML)	EA	1.0	$0.10	$0.01	$0.11

Member No: 11123 — Baker, Mike (11123), PO Box 15, Westlock, AB, 780.459.1202
Location: St. Albert — Sales Rep: Bruce Clarkson — Date: Jun 04, 2018

Sub Total $1.89 — Items 2
Tax Total $0.10 — Print Full Invoice
Invoice Total $1.99 — Total (F12)

Regular Font

	Payment Type	Amount	Total Amount	Amount Tendered	Change Due
▸	Debit Card	$1.99	$1.99		

Invoice Total: $1.99
Pay This Amount: $1.99
Total Change Due: $0.00

Large Font

	Payment Type	Amount	Total Amount	Amt Tendered	Change Due
▸*	Debit Card	$1.99	$1.99		

Invoice Total: $1.99
Pay This Amount: $1.99
Total Change Due: $0.00

AR Return Process (optional)

The **AR Return Process** restricts the returning of items without a receipt (for example, when a customer brings back a drum or tote purchased elsewhere for return of their deposit) to specified users. If you want to enforce it, check *Require Security to Return without a Receipt*.

File > Config Options > Company > Accounts Receivable tab

Grant permission to *Return without Receipt* to those users who will need it.
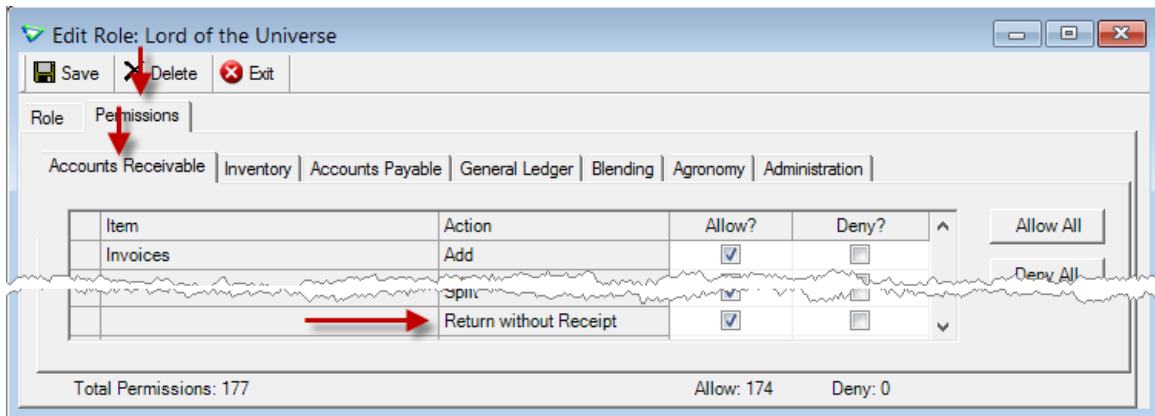
File > Security > Manage Roles

Associated Product Behavior for Scanned Items (optional)

If using a scanner to add items, the default Quantity is always 1. If the scanned item has optional *Associated Products*, the default Quantity of those is also 1. If you were adding more than 1 of the scanned item, you'd need to either scan the item and select the optional Associated Product(s) multiple times or you'd need to edit *each* product row and update the quantity.

When *POS Invoice: Scan with Non-Mandatory Associated Product: Edit Qty* is checked, after scanning an item with optional associated products agrē pops up the regular Add Product window to allow you to change the Quantity of the scanned item before the Associated Products are added - so there is no need to scan the item multiple times, or go back and edit each row.
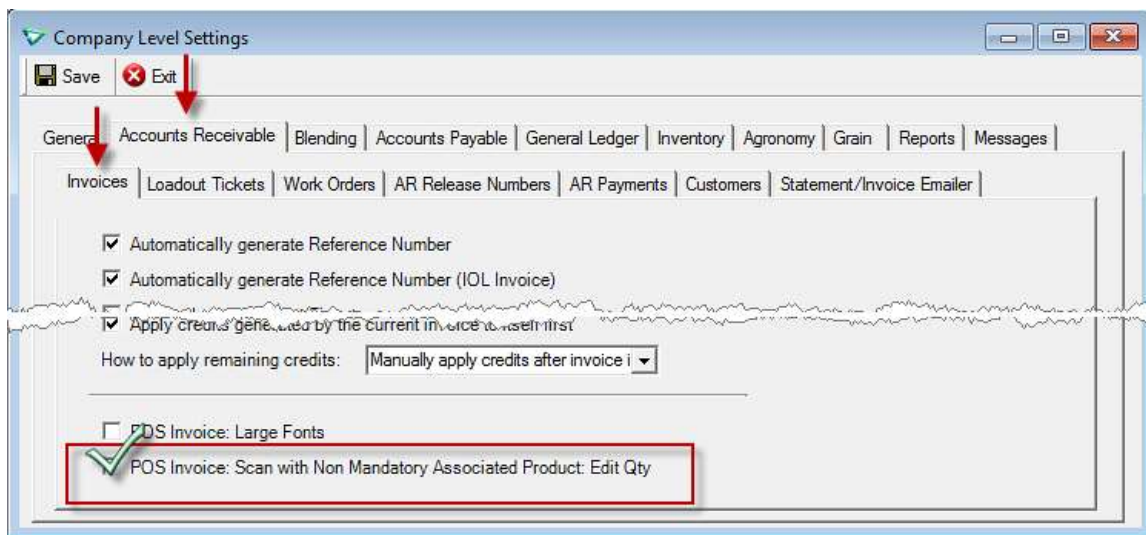
File > Config Options > Company > Accounts Receivable tab

Location Settings

Optionally add a POS Invoice note to display on each POS Invoice receipt.

File > Manage > Locations

Each location may have a different note, and the note can be updated at any time.

AR Payment Types

Only AR Payment Types with *Show on POS Invoice* checked will be available when accepting payment for POS Invoices. For example you may want to allow POS payments of cash, debit, and credit cards, but not FCC or cheques.
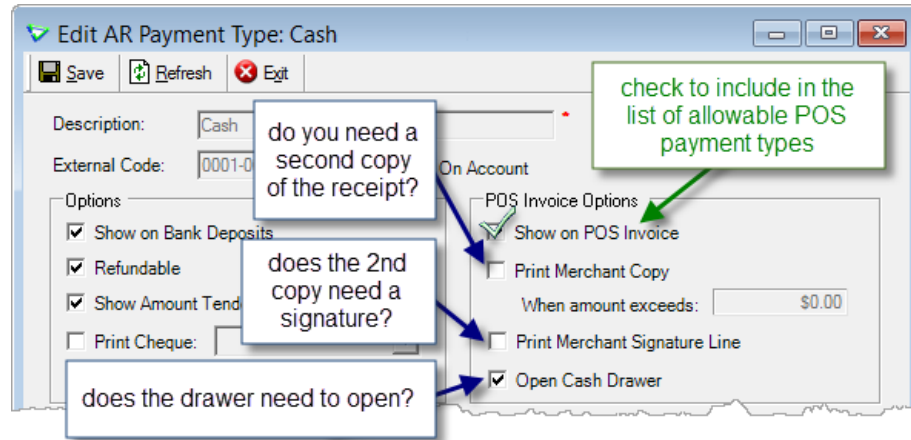
Accounts Receivable > Manage > AR Payment Types

You also have the option to print a second **Merchant Copy** of the invoice and payment receipt, for all POS Invoices or just those over a certain dollar value, with or without a **Signature Line** for the customer to sign.

- Merchant copies are available only when printing POS Invoices.

- If you're printing a Full Invoice you will not get a merchant copy.

- If you are returning items on a POS Invoice you will get a merchant copy whether this box is checked or not - **returns always require a customer signature**!

Products

Note	Products flagged as requiring a Lot# must be saved on a full invoice.

Inventory > Manage > Products / Lot Number Required?

UPC Codes

If you'll be using a scanner, setup UPC codes for items.
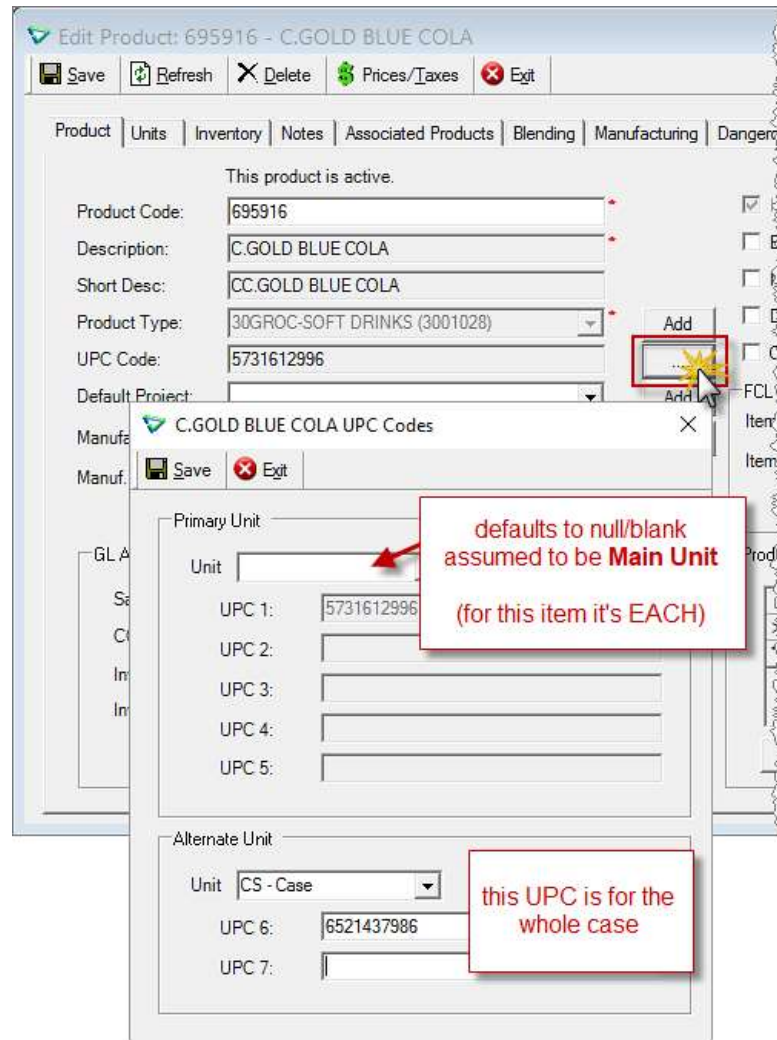
Inventory > Manage > Products

Items with multiple Unit Types can have corresponding UPC codes for each unit.

For example, you sell cola by the can (Eaches) and by the Case of 12 cans.
UPCs 1-5 are associated to a can (the main/mapped unit type).
UPCs 6-7 are associated to a case.
When scanning the item, the unit type and price will default to match the UPC scanned.

Tax-Included/Gross-Unit Pricing (optional)

Note	There is a config option Tronia must turn on in the background to enable gross-unit (or tax-included) pricing.

To sell items like fuel on POS Invoices, where the posted price *includes* the taxes, you'll need to tell agrē that the price you're setting does in fact include the taxes.
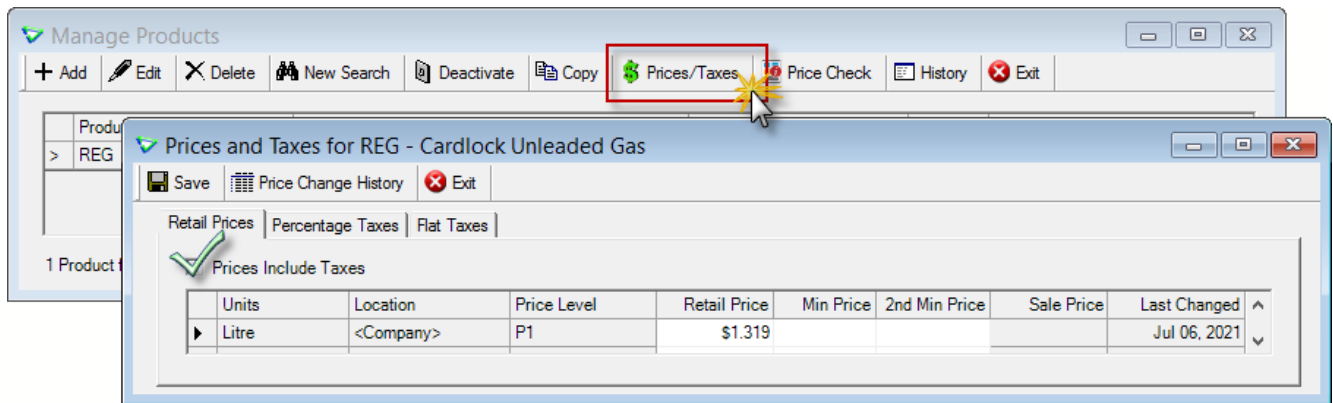
Inventory > Manage > Products

After you've set the price to include the taxes, when you add the item to a *POS invoice* (or a regular invoice) agrē will reverse-engineer the gross-unit price to calculate the usual unit price and the taxes.
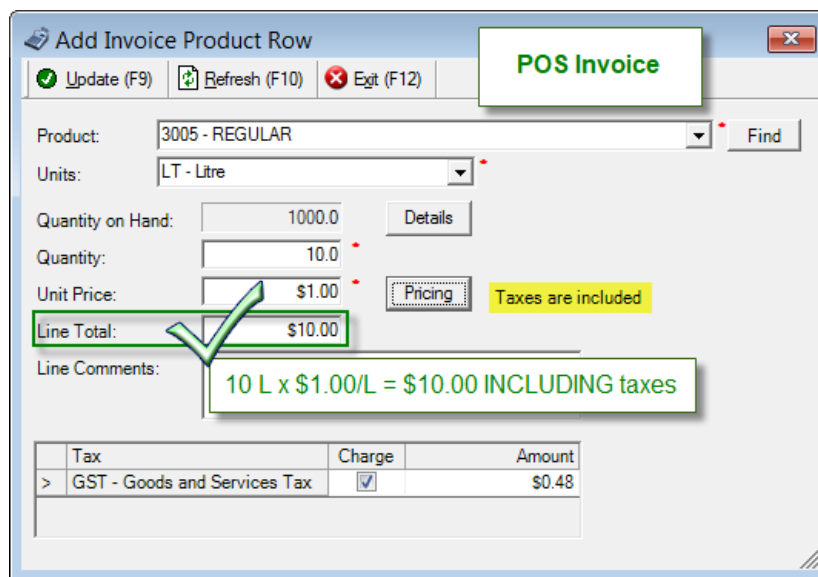
Emailing Customer Receipt (optional)

> **Note** POS Invoice Receipts can be emailed without adding an address to the customer account by entering one on the fly.

If you will be emailing customers a copy of their POS Invoice Receipt, adding an email address to the customer accounts in advance will save you the time of having to enter one manually for each POS Invoice.

Inventory > Manage > Products
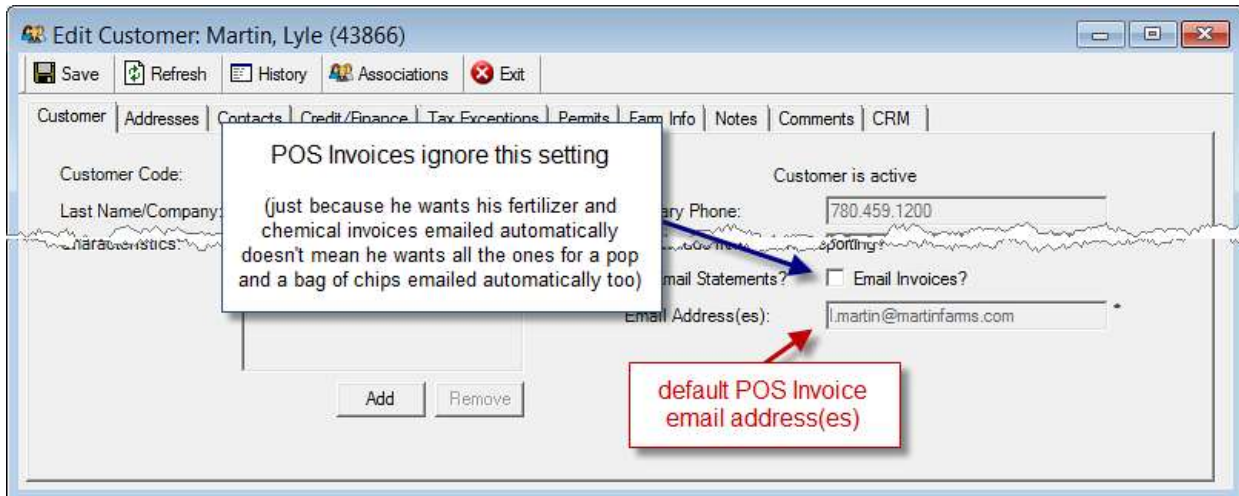
This address can be changed at the time of emailing the POS Invoice.

Toolbar Customization (optional)

For users creating Point of Sale invoices on a regular basis, consider having them add the **POS Invoice quick button** to their tool bar.
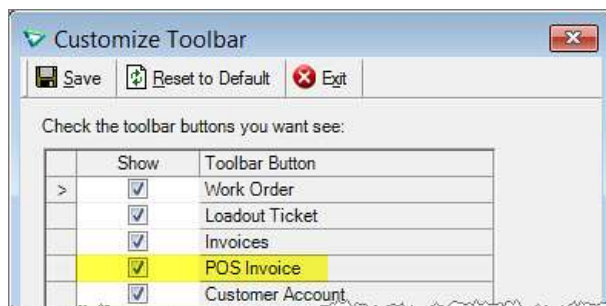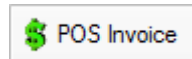
Window > Customize Toolbar

Appendix I - Cash Drawer Codes

Manufacturer	Model	Drawer Codes	Cutter Codes
3NSTAR	LPT005	27,112,0,25,250	.
AGPTek	SC9-5870	27,112,0,25,250	.
Appostar	RTP-3280	27,112,0,25,250	.
Axiohm	A715	27,112,0,48,251	27,105 - Full
	A756	OR	27,109 - Partial
	A794	27,112,1,49,251	
Bematech	MP-250TH	27118140	.
Bematech	SRP-350PLUSiii	27,112,0,50,250	.
Bixolon	SRP-150UG	27,112,0,50,250	.
Bixolon	SRP-275	27,112,48,55,121	.
Bixolon	SRP-280	27,112,0,64,240	.
Bixolon	SRP-330	27,112,0,25,255	.
Bixolon	SRP-350	27,112,0,50,250	.
	SRP-350ii		
Bixolon	SRP-375P	27,112,48,55,121	.
Code Soft	3200 SERIES	27,112,0,25,250	.
Code Soft	DP7645III	27,112,48,55,121	.
Custom	Q3	27,112,0,50,250	27105
Dell	T200	7	.
DCAPOS	POS 8350	27,112,0,25,250	27105
DIGIPOS	DS-800	27,112,48,55,121	.
EC-Line	EC-PM-520	27,112,0,40,168	.
	EC-PM-80330		
EC-Line	EC-PM-5890X	7	.
Epson	?	27,112,48,55,121	.
Epson	TM-T20	27,112,48,55,121	.
Epson	M51PD	27,112,0,25,250	.
Epson	TM-T60	27,112,32,25	.
Epson	TM-L60II	27,70,0,50,50	.
Epson	TM-T70	27,112,48,55,121	27109
Epson	TM-T80P	27,112,0,25,250	.
Epson	TM-T81	27,112,0,25,250	27109
Epson	TM-82	27,112,0,25,251	.
	TM-82ii		
Epson	TM-T85	27,112,0,25,250	.
Epson	TM-T88	27,112,0,25,250	27109
Epson	TM-T88II	27,112,0,25,250	27121
Epson	TM-T88IIP	27,112,48,55,121	27109
Epson	T88iii	27,112,0,25,250	27109
Epson	T88iiiP	27,112,0,64,240	27109

Epson	TM-88IV	27,112,48,55,121	27, 109
Epson	TM-88V	27,112,48,55,121	.
Epson	TM-90	27,112,0,25,250	27109
Epson	M115A	27,112,0,25,250	.
Epson	M129C	27,112,0,64,240	27109
Epson	M188A	27,112,0,25,250	.
Epson	M188B	27,112,48,55,121	27,112,0, 5,250
	M188D		
Epson	M192C	27,112,0,64,240	27109
Epson	M192H	27,112,0,64,240	27109
Epson	T200	27,112,0,25,250	.
Epson	TM-200	27,112,0,64,240	.
Epson	TM-200	27,112,0,25,250	27,112,0,75,250
Epson	TM-U200B	27,112,48,25,250	.
Epson	TM-U200D	27,112,0,64,240	.
Epson	TM-U210PD	27,112,0,25,250	27,112,0,75,250
	TM-U210D		
Epson	TM-220	27,112,0,25,250	.
		OR	
		27,112,0,64,240	
Epson	TM-U220	27,112,0,25,250	.
		OR	
		27,112,0,64,240	
Epson	TM-U220A	27,112,0,25,250	27,112,0,75,250
	TM-U220PD	OR	OR
		27112	27105
Epson	TM-U220B	27,112,0,25,250	.
	TM-U220PD		
Epson	TM-U220D	27,112,0,25,250	27,112,0,75,250
	TM-U220PD		
Epson	M253A	27,112,48,55,121	.
Epson	TM-U295	27,112,48,55,121	.
Epson	ADP 300	27,112,0,25,250	.
Epson	TM-300D	27,112,0,25,250	27105
Epson	LX-300+	27,112,0,25,250	.
		OR	
		27,112,48,55,121	
Epson	TM-U300PC	27,112,0,25,250	.
	TM-U300PD		
Epson	TM-U325D	27,112,0,25,250	.
Epson	TM-U375	27,112,0,25,250	.
Epson	ECP-500	27,112,48,55,121	.
Epson	M665A	27,112,48,55,121	.

Epson	TM-T883P	27,112,0,50,250	27109
Epson	TM-U950P	27,112,0,50,250	.
Epson	TM-H5000II	27,113,0,25,250	.
		OR	
		27,25,247	
Epson	TM-H6000	27,112,48,55,121	.
	TM-H6000ii		
Epson	TM-J7100	27,112,48,55,121	27109
Essae	PR-85	27,112,0,100,100	.
Gainscha	GP-80160	27,112,0,100,250	.
Goangzhou	AB-88A	27,112,0,50,250	.
Gprinter	GP-5890	27,112,0,100,250	.
	GP-80160		
Fujitsu	fp-350	27,112,0,48,251	.
Fujitsu	fp-410	27,112,1,49,251	.
HP	A798	27,112,0,8,8	.
	A799		
	A799-C40W		
HPRT	TP805	27,112,0,250,250	.
IBM	4610	7	.
IBM	4610	27,112,0,50,250	27,12
IBM	Sure POS	27,112,0,250,250	.
IDIPOS	AB-88H	27,112,0,50,250	.
INFOCOMM	P80	27,112,0,50,250	.
Ithaca	PcOS 50	27,112,0,25,250	.
		or	
		7	
Ithaca	PcOS 51	27,112,0,25,250	.
		or	
		7	
Ithaca	PcOS 52	27,112,0,25,250	.
		or	
		7	
Ithaca	POSjet	27,112,0,25,250	.
Ithaca	80 PLUS	27,120,1	27118
Ithaca	SERIES 90	27,120,1	.
Ithaca	SERIES 94	27,120,1	.
Ithaca	150	27,120,1	.
Ithaca	280	27,112,0,250,250	27105
		27,112,1,49,251	27109
Ithaca	iTherm 280	27,120,1	27118
		27,120,2	
Ithaca	POSjet 1000	27,120,1	.

		27,112,0,25,250	
Jolimark	TP820	27,112,0,100,250	.
Kasir Enibit	P58B	27,112,0,25,250	.
Koohii	SMART 300	27,112,0,25,250	.
MetaPace	T1	27,112,48,55,121	.
	T3		
NCR	7167	Drawer #1	27, 105
	7179	27,112,0,55	
	7197	Drawer #2	27, 109
		27,112,1,55	
NCR	7223	27,112,80,25,250	27, 112,1,55
NEC	TSP-100	7	27100
NEXA	PX700	27,112,0,50,250	.
Obvios	ORP-800	27,112,0,25,250	.
Ojuled	POS58	27,112,0,25,125	.
Oki	OKIPOS 407	7	27,100,49
Oki	OKIPOS 1000	27,120,1	27118
Olivetti	PRT-100	27,112,0,25,250	27,12,0,25,250
POS-X	PT3	27,112,0,25	.
POS-X	XR-200	27,112,0,25,250	27105
	XR-250		
	XR-500		
POS-X	EVO-RP1	27,112,0,25	27105
Posiflex	CR 4200	27,112,80,25,250	.
		OR	
		27,112,0,25,250	
Posiflex	AURA 5600	27,112,0,25,250	.
	AURA 8000	or	
		27,112,80,25,250	
Posiflex	PP6000	27,112,0,25,250	.
	PP6900		
	PP7000		
	PP8000		
Samsung	STP 131	27,112,0,48,50	.
Samsung	SRP 220	27,112,48,55,121	.
Samsung	SRP 270	27,112,0,25,250	.
		OR	
		27,112,0,60,240	
Samsung	SRP 270A	27,112,0,64,240	.
Samsung	SRP 275	27,112,48,55,121	.
	SRP-275AP		
	SRP-275C		
Samsung	SRP 350	27,110,0,25,250	.

Samsung	SRP 350T	27,112,0,50,250	.
Seiko	ESC-POS	Drawer #1	Full cut
	RP-B10	27,112,0,50,250	27, 105
	RP-E10	Drawer #2	Part cut
		27,112,1,50,250	27, 109
Sensonic	T-300	27,112,0,25,250	.
Sewoo	LK-TL-322	27,112,0,50,250	.
Shenzhen	POS-8350	27,112,0,25,250	.
Sinocan	PO6-U/S/L	27,112,48,55,121	.
SNBC	BTP-M280	27,112,0,50,250	.
SNBC	BTP-R880NP	27,112,48,55,121	.
SNBC	BTP-2002NP	27,112,48,40,200	27105
Star	All?	27,7,11,55,7	.
Star	TSP 100	7	27100
	TSP 100ii		
Star	TSP 100IIU	27,7,11,55,7	27,100,48
Star	SP200	27,7,11,55,7	.
	SP200-2		
	SP212		
Star	TSP200	27,7,11,55,7	27,100,48
Star	SP500	27,122,49,7	27,100,48
		OR	
		27,7,11,55,7	
Star	SP512	27,122,49,7	27,100,48
Star	SP550II	27,7,10,50,7	.
Star	TSP-600	7	27,100,51
		OR	
		27,7,10,50,7	
Star	TSP-613TSP-650TSP-654iic	7	.
		27,7,10,50,7	
		27,7,11,55,7	
Star	TSP-700TSP-700ii	27,07,11,55,07	27,100,51
Star	TSP-743ii	27,7,11,55,7	27,100,51
Star	SP2000	27,122,49,7	27,100,48
Star Micronics	TSP-650	27,112,0,48	.
Star Micronics	dp-8340fm	27,7,11,55,7	.
Syncotek	SP-POS88VI	27,112,48,32,64	27109
TEC	RKP300	27,112,0,100,250	27105
TEC	TRST-A10	27,112,48,55,121	.
TEC	TRST-53	27,112,0,100,250	27105
	TRST-56		
Toshiba	TRST-A10	27,112,48,55,121	.
	TRST-A15		

Toshiba	SUREPOS500	27,112,0,250,250	.
Toshiba	SX2100	27,112,32,55,255	.
TOSHIBA TEC	DRJST-51	27,112,0,100,250	27105
TPG	A776	27,112,1,49,251	.
	A794		
	A798		
TVS	RP-3200	27,112,0,100,250	.
TPG	A799	27,112,0,8,8	.
Tysso	PRP076	27,112,0,50,250	.
	PRP300		
UCOM	U808	27,112,0,25,25	.
Unisys	EF4272	27,112,0,100,250	.
WASP	F100	27,112,49,48,48	27105
	WTP-100		
WESTREX	4200	7	20
Xprinter	XP-C20-K	27,112,0,148,49	.
	XP-360		
	XP-350-B		
Zjiang	POS-58	27,112,0,150,250	.
Zjiang	ZJ-8200	27,112,0,48,48	.
Zjiang	ZJ-8250	27,112,0,25,250	27,105 Full
			27,109 Partial
Zonerich	AB-88H	27,112,0,50,250	.