Web portal 2016
v.2.0.7. & v017

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First steps with the AdeoPOS Cloud application

After opening your user account, in order to log in into the AdeoPOS Cloud application go to the following website, URL: https://service.adeopos.com. Enter your username and password into the login form and press the "Login" button, Figure 1.
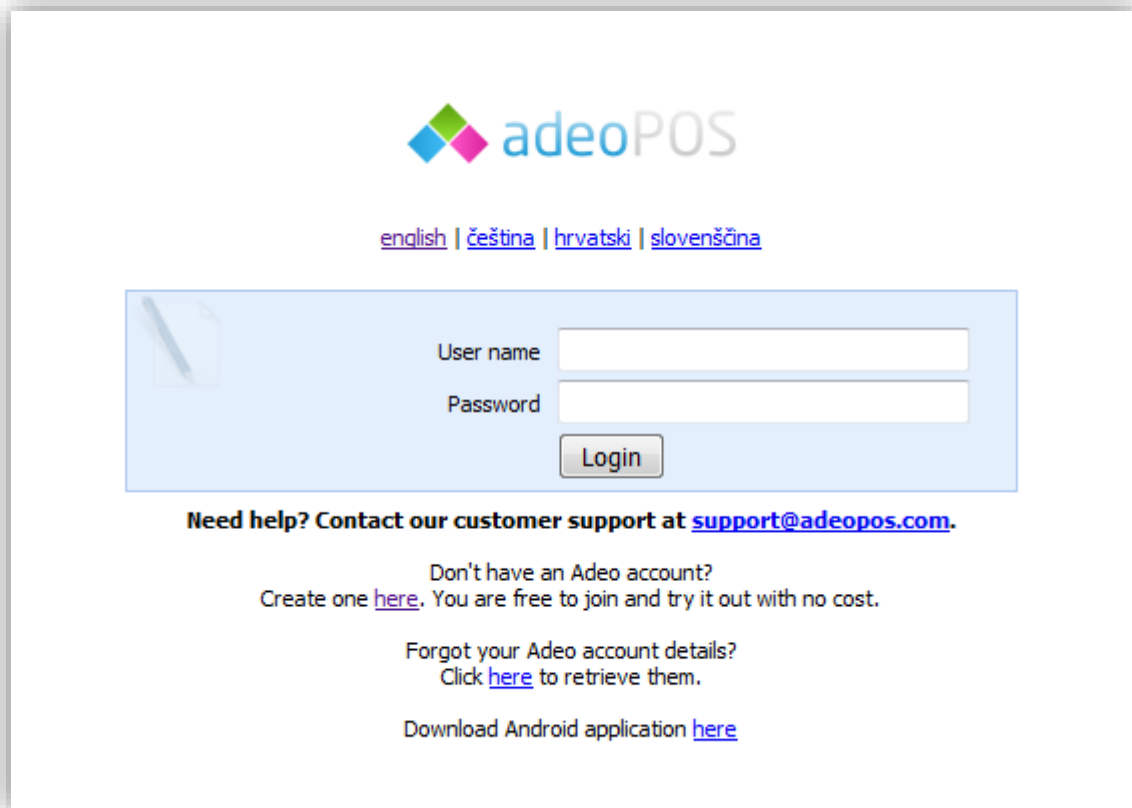
Figure 1: Login

After successful login, you should see the user interface of the application. The application "Main menu" is placed on the left side of the UI, Figure 2. It allows navigation through different application modules which most frequent options we will discuss in separate chapters. Most of the modules have their respective "Search parameters" field, Figure 3, and the "Main toolbar", Figure 4.

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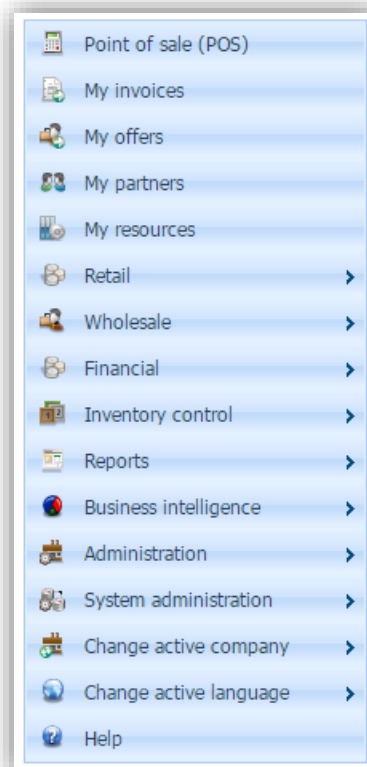**phone**+385 1 660 38 21 **email** info@neoinfo.hr **web** www.neoinfo.hr

Figure 2: Main menu

By entering the desired parameters in the "Search parameters" field and pressing the "Filter" button from the "Main toolbar", you control displayed items. Note that if a module has the "Date" search parameter, it is commonly set to the current day for a better readability.

Figure 3: Example of the "Search parameters" field

Figure 4: Example of the Main toolbar

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Administration

Entry of a new employee

Initial employees will be presented according to your requirements in the agreed initial company setup. For all initial employees, we have created user accounts with the associated authorization rights for their roles and linked them with the physical Registry if any. If you need to enter a new employee, you can enter it yourself by following directions bellow.
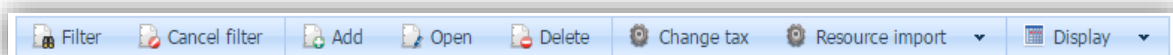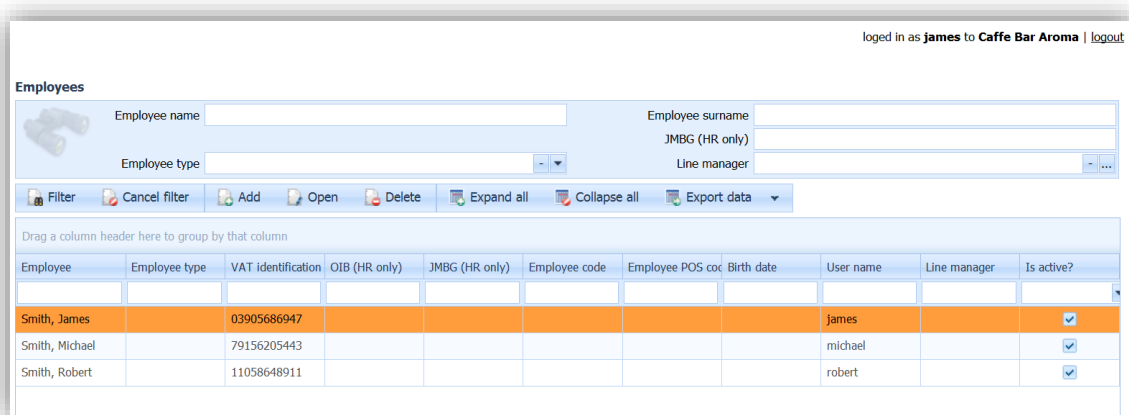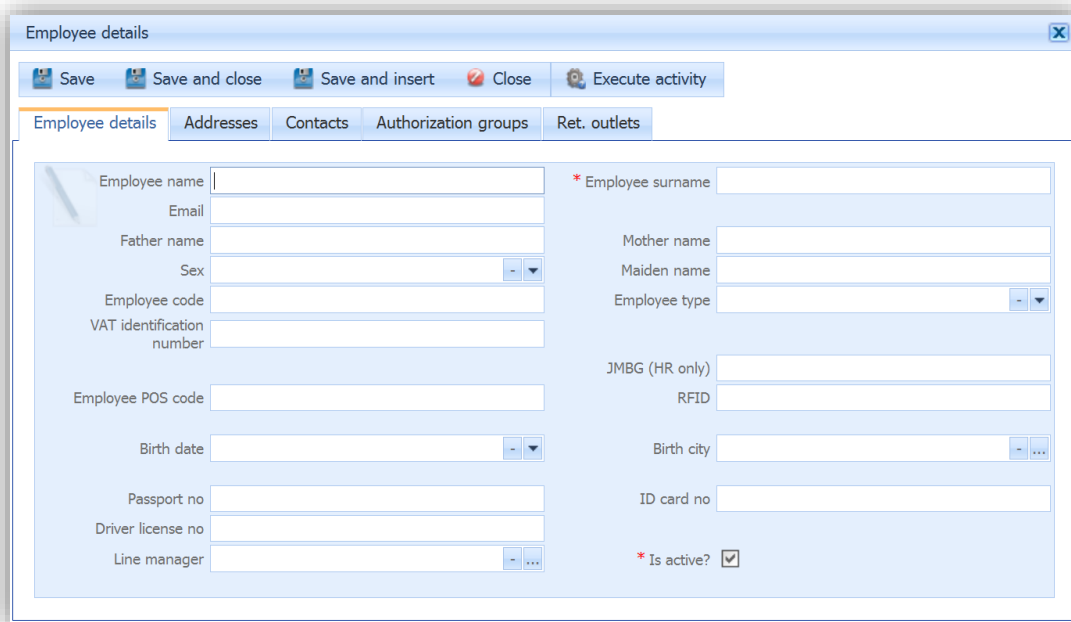
From the main menu select: Administration→Employees
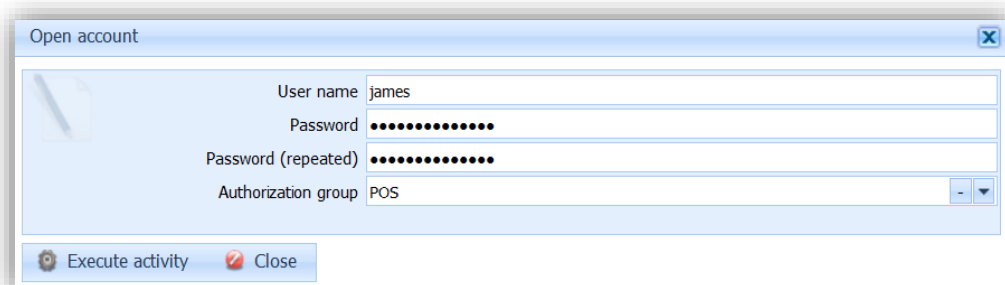
Figure 5: Employees

Pressing the "Add" button will open the employee entry form, Figure 6. You need to enter important fields, like "Employee name", "Employee surname" and "VAT identification number".All additionally provided fields are optional. Save the employee by pressing the "Save" button placed on the top-left corner of the employee entry form. "Save and close" and "Save and insert" options are for saving and closing the form and for saving and opening a new employee form, respectively.

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Figure 6: Employee entry form

Once you have saved the employee, you need to open a user account for them. The newly added employee is placed in the employee list together with existing employees. You can open their entry form at any time either by double clicking on their row or by selecting them and pressing the "Open" button. The next step is to press the "Execute activity" menu button placed on the top-right corner of the entry form, Figure 6. From the execute activity drop-down menu select the "Open account" option and enter the employee username, password, and desired authorization group. To finish the account opening press the "Execute activity" button, Figure 7.

Figure 7: Opening account

The last step is to assign the employee to the particular registry, in order to enable their access to the registry for the purpose of invoice issuing. Open the "Ret. outlets" tab placed top-right inside the employee entry form and press the "Add" button, Figure 8. Choose the desired retail outlet and save the changes, Figure 9.
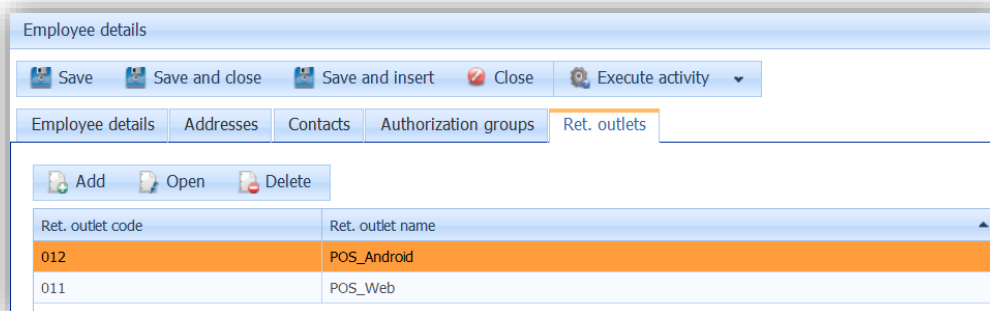
Figure 8: Ret.outlets tab
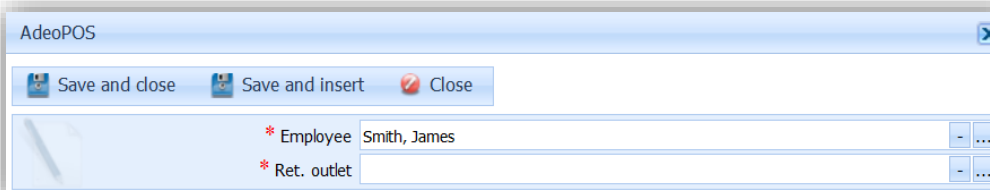
Figure 9: Assigning the employee to the registry

You can also assign an employee to a Registry in a similar way with the help of following quick directions.

From the main menu select: Administration → Retail outlets
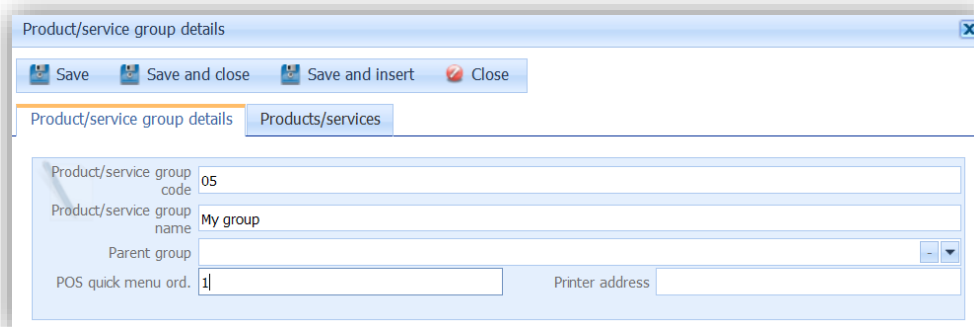
Open the desired outlet and press on the employee tab. Now press the add button, choose the desired employee and save your changes.

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POS product/service groups

To create a now or edit an existing product/service group follow the directions bellow.
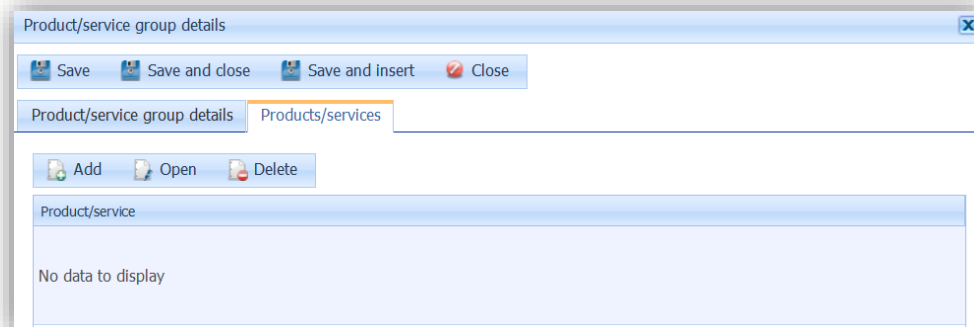
From the main menu select: Administration →POS product/service groups

From there you can press the "Add" button to add a new group or the "Open" button to edit the existing one. If you are adding a new group, enter the group name and code and press the "Save" button, Figure 10. To assign products/services with the group, press on the "Products/Services" tab, Figure 11. By pressing the "Add" button you can assign any available product/service to the group, Figure 12. You can remove product/service from the group with the "Delete" button. Assigned products/services will be available on the POS from its group, which is convenient in case of plenty products/services. Note that one product/service can be assigned to only one product/service group.
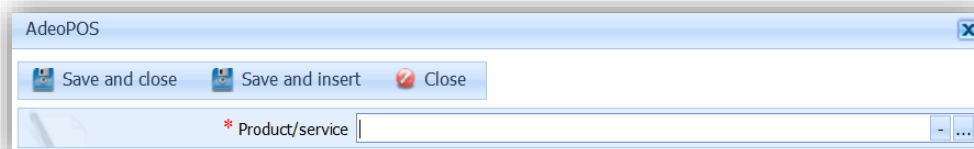
Figure 10: Product/service group details tab

Figure 11: Products/services tab

Figure 12: Assigning a product to the group
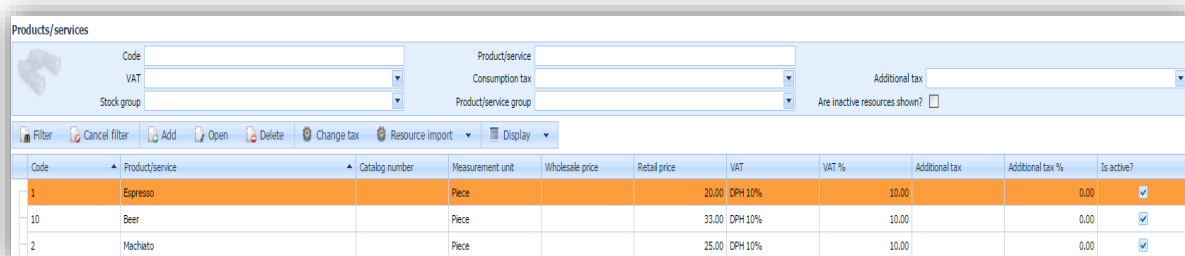
My resources

Entry of the products/services into the "My resources" product/service price list

From the main menu select: Administration → My resources
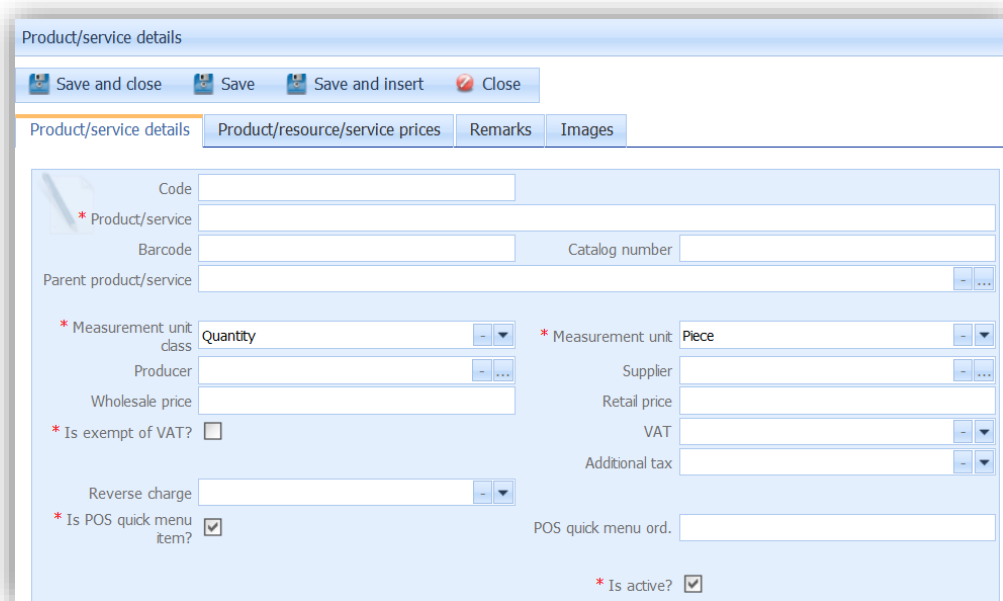
List of the existing products/services will be shown, Figure 13. You can edit an existing product/service by selecting it and pressing the "Open" button. To enter the new product, press the "Add" button. Inside the newly opened entry form, Figure 14, enter the data for all the required fields marked with red asterisk symbol. Save your product/service with one of the three possible save options:

- Save and close – saves and closes entry form
- Save – saves entry form
- Save and insert – saves entry form and starts a new one

Figure 13: My resources

Figure 14: Product/service entry form

Registry

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From the "Registry" module you can issue retail invoices. On the left-hand side of the screen, you will find your items and their groups, and on the right-hand side you can see the invoice in preparation, Figure 15. At the top-left corner, you can choose a currently active registry and its user.
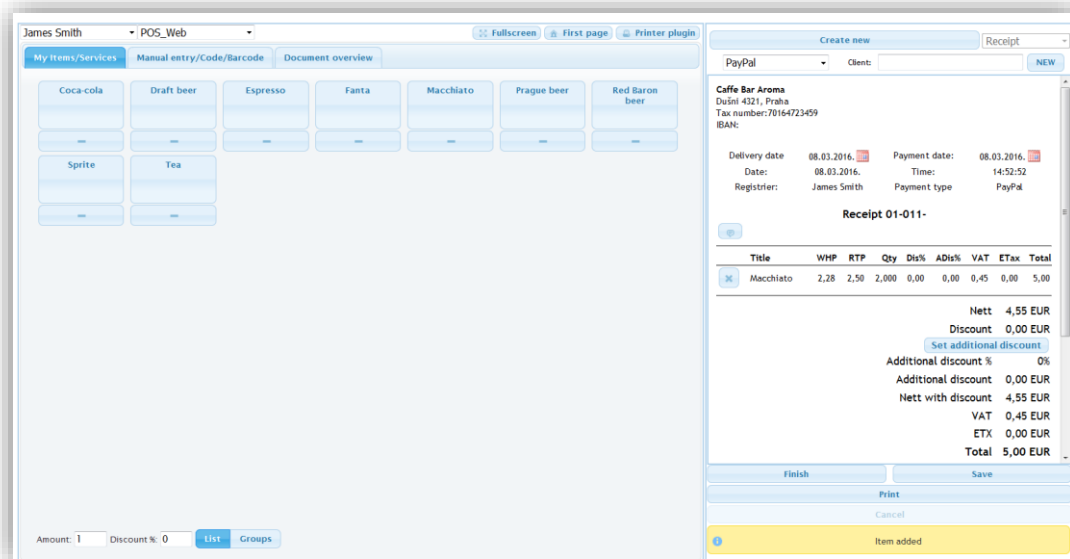
Figure 15: Registry module

By pressing an item name, it will be added to the invoice in preparation. Similarly, by pressing the "Minus" button below its name it will be removed from the invoice. You can access your groups by pressing the "Groups" button placed in the bottom-left corner, Figure 16. Next to it you can set an amount and a discount to be applied to the next added item.
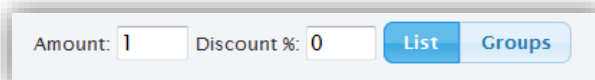
Figure 16: Amount, Discount, List and Groups

At the top of the invoice in preparation you have the options to start a new invoice, choose a payment type or client and even switch from making a receipt to making an offer, Figure 17. The interactive elements found inside the invoice body are: „X" button for quick removing added items or clients, „Calendar" button for editing delivery and payment dates, „Set additional discount" button for setting a discount to be applied on all invoice items, and the „Remark" button for entering additional text to the invoice, like a free WiFi access data or an example, Figure 18.

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Figure 17: Invoice in preparation
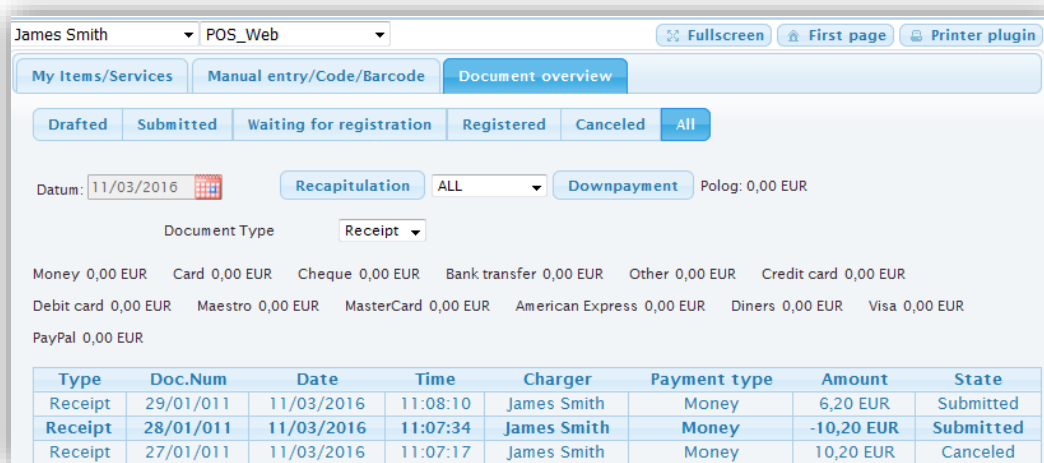
Figure 18: Remark example

At the bottom of the invoice in preparation, you can find the following final operations for the invoice:

- Fiscalize – Ficalizes and prints invoice

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- ▪ Save – Saves invoice for later use
- ▪ Print – Prints invoice for the preview
- ▪ Cancel – Cancels fiscalized invoice

To cancel a fiscalized invoice or keep working on a previously saved invoice, first you have to select it. In order to do so, press on the „Document overview" tab and find it, Figure 19. Note that the document overview has initially set date to the current date.

Figure 19: Document overview

Through the "Manual entry/Code/Barcode" tab, you can enter a custom item to the invoice or go to the barcode sub tab adjusted for working with the barcode reader. Note that you can choose a template for a custom item by entering a code of the existing one.

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My partners

Entry of a new partner

To enter a new partner follow the directions bellow.

From the main menu select: My partners

Figure 20: My partners

From the "Add partner" drop-down menu, you can choose one of the two offered partner types, Figure 21.
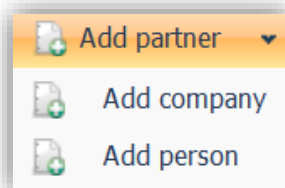
Figure 21: Partner types
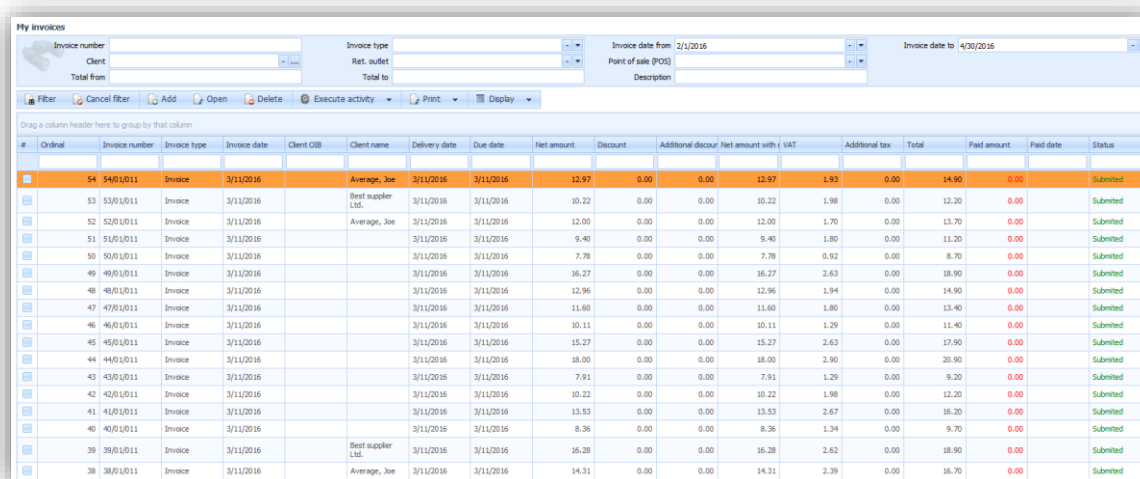
After pressing the partner type the corresponding entry form will pop-up. Inside the entry form enter the data for all the required fields marked with red asterisk symbol and save your partner with one of the three possible save options.

Client details

Select the desired partner and press the "Client details" button. From this point you can see business related information such as responsible employee or details of all documents linked with the client.

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My invoices

The "My invoices" module contains list of the all issued invoices. From this module you can issue a wholesale invoice, print any issued invoice and cancel any issued invoice. To cancel an issued invoice, select it and then from the "execute activity" drop-down menu select the "Cancel invoice" option.

Figure 22: My invoices

Issuing the wholesale invoice

Pressing the "Add" button will open an entry form for a new wholesale invoice. Enter your respective invoice details and save the form. After that, you can add the desired items to the invoice from the "Invoice items" tab by pressing its "Add" button. Choose the desired item, edit the needed details and press on one of the two saving options. Note that its unit price is a wholesale price and it will be initially set to zero if it is not defined. After you have added all the desired items to the invoice, in order to complete it press on "Execute activity" drop-down menu and choose "Submit/register invoice", Figure 23.

Figure 23: Wholesale invoce

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Printing the issued invoice

Select the desired invoice and choose one of the two offered options from the "Print" drop-down menu. You will get a preview of the invoice in the newly opened window, from which you can continue with the invoice printing by pressing the print symbol or you can save it in the desired format by pressing the save symbol, Figure 24.
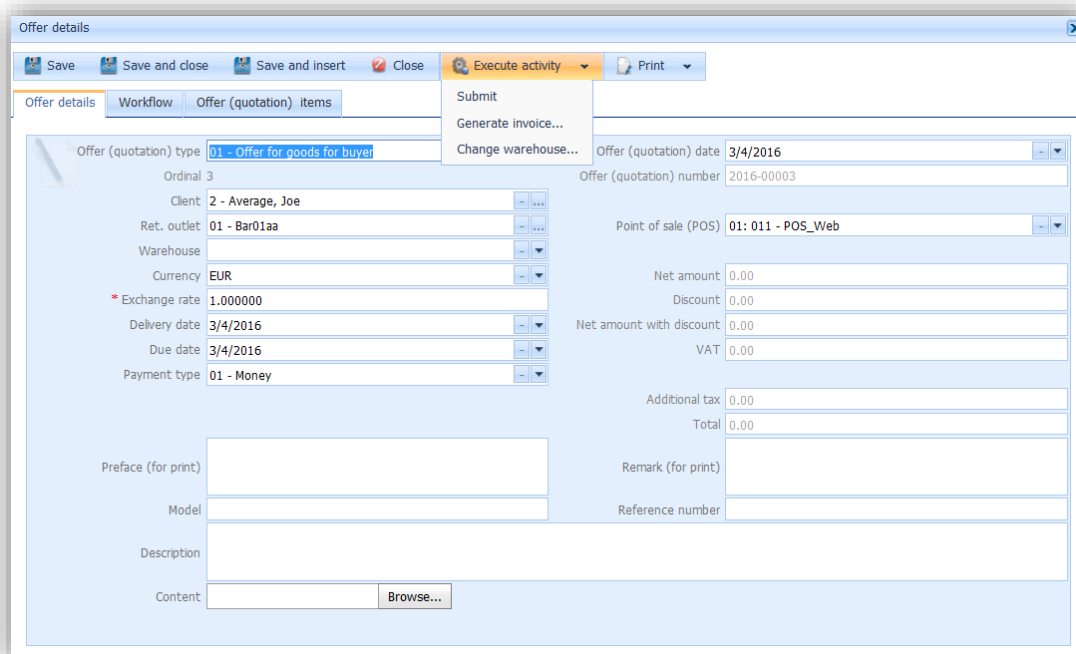
Figure 24: Invoice example

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My offers

Creating the sale offer

From the "My offers" module press the "Add" button and the entry form for a new sale offer will open. Offers are created in a similar way as the wholesale invoices. First you need to enter the client and, optionally, a warehouse and save the offer. After you have saved the offer, you can start adding items from the "Offer (quotation) items" tab. To complete your offer, after you have added all the desired items, you have to choose the "Submit" operation from the "Execute activity" drop-down menu, Figure 25. At any time, you can generate an invoice from the same drop-down menu or undo your submitted offer.

Figure 25: Offer example

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Inventory control

With the "Inventory control" module you can keep track of your inventory warehouse balance. The following sections will lead you into creating the inventory control documents and setting the inventory control definitions.

Warehouse definition

The first precondition for all the following actions in the "Inventory control" module is to define the warehouse.

From the main menu select: Inventory control → Definitions → Warehouses

Press the "Add" button, fill the entry form and save your warehouse.
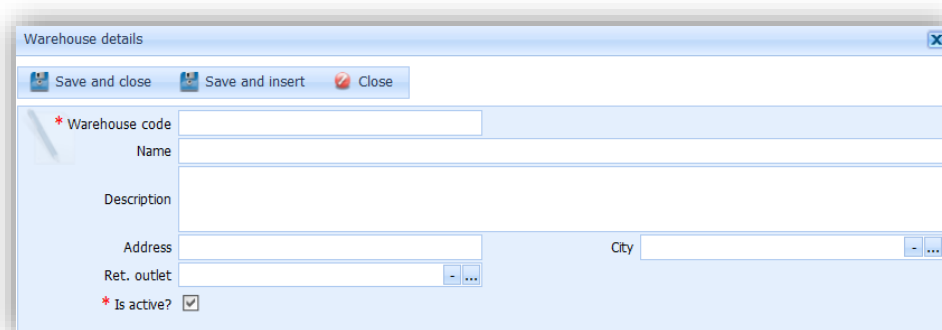
Figure 26: Warehouse definition

Warehouse balance

From the main menu select: Inventory control → Warehouse balance

From this point you can see balance of your warehouses. Provided search fields and the "Filter" button will help you in the checkup. Items are added to the warehouse by creating "Goods incoming document" and deducted from it automatically by issuing an invoice.

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Figure 27: Warehouse balance

Goods incoming (Incoming inventory control document)

From the main menu select: Inventory control→ Inventory control documents → Goods incoming

The incoming inventory control document represents an input to the warehouse. The following steps will lead you trough its creation:

1. Press the "Add" button and select "Add incoming inventory control document"
2. Fill in the entry form as follows:

Choose document type, warehouse and date of the document. In this case, optional field client represents a supplier.When you are done, press the "Save" button.

Figure 28: Incoming inventory control document details

3. Press on the "Incoming inventory control document items" tab
4. Press the "Add" button
5. Fill in the entry form as follows:

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Choose a product/service.The unit incoming price field will be equal to the wholesale price of the item or it will be set to zero if WP is not defined. Enter the quantity and press one of the saving options. Repeat this process for adding all additional items to this document.

Figure 29: Adding an incoming item

6. To finish your document press on the "Submit" from the "Execute activity" drop-down menu
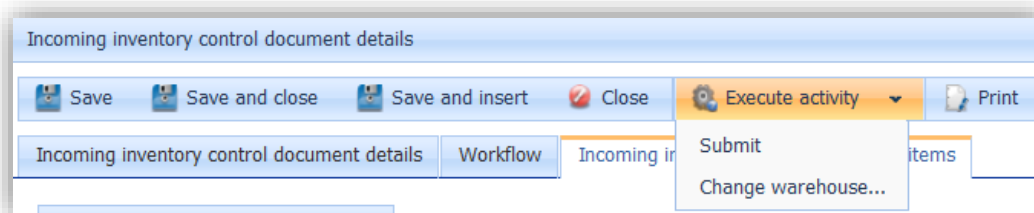
Figure 30: Submitting the document

Incoming calculation

From the main menu select: Inventory control→ Inventory control documents → Goods incoming

The incoming calculation document is a similar document as the previously mentioned goods incoming document. The difference between those two documents is that trough calculation document you are also defining items final sale price by declaring desired gross margin. The price defined in the calculation has an advantage over manually defined price. The following steps will lead you trough creation of the incoming calculation:

1. Press the "Add" button and select "Add incoming calculation"
2. Fill in the entry form as follows:

Choose document type, warehouse and date of the document. In this case, optional field client represents a supplier.When you are done, press the "Save" button.

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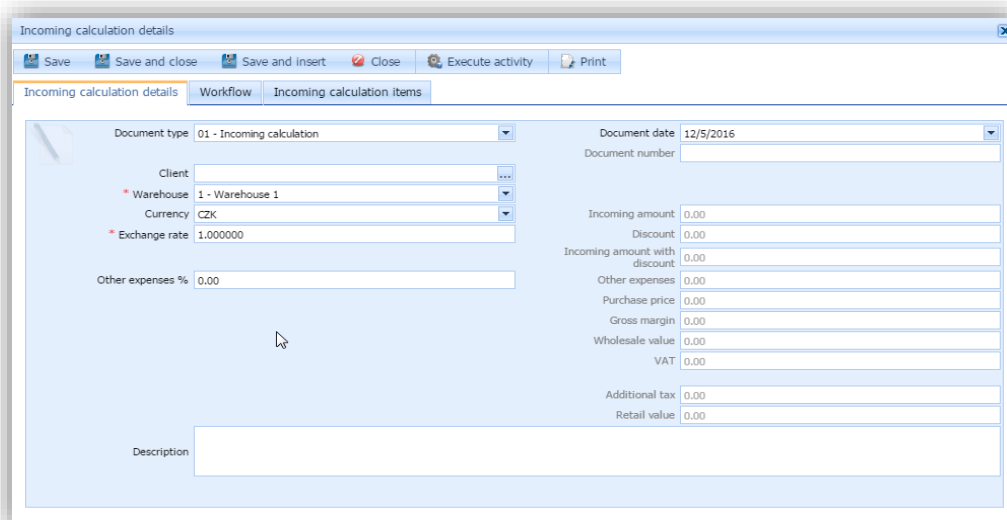
Figure 31:Incoming calculation details

3. Press on the "Incoming calculation items" tab
4. Press the "Add" button
5. Fill in the entry form as follows:

Choose a product/service. The unit incoming price field will be equal to the wholesale price of the item or it will be set to zero if WP is not defined. Enter the quantity and the gross margin. There are three ways for declaring your desired gross margin. Save the item entry form and repeat this process for all other incoming items.
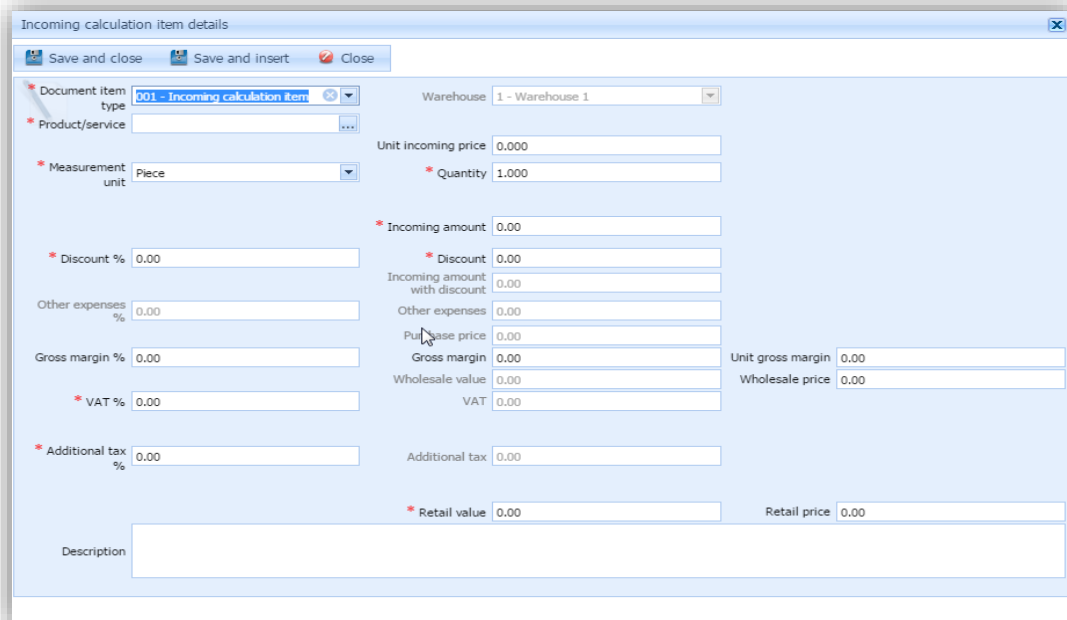
Figure 32: Adding a calculation item

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6. To finish your document press on the "Submit" from the "Execute activity" drop-down menu
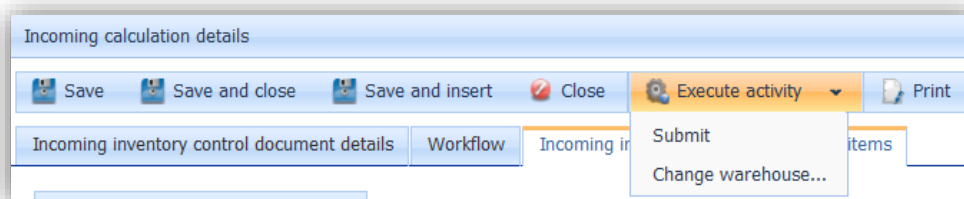
Figure 33: Submitting the document

Goods outgoing

From the main menu select: Inventory control→ Inventory control documents → Goods outgoing

The creation of goods outgoing document is needed in cases like returning damaged goods to the supplier. The following steps will lead you trough creation of the goods outgoing document:

1. Press the "Add" button and select "Add outgoing inventory control document"
2. Fill in the entry form as follows:

Choose document type, warehouse and date of the document. In this case, optional field client represents a supplier.When you are done, press the "Save" button.
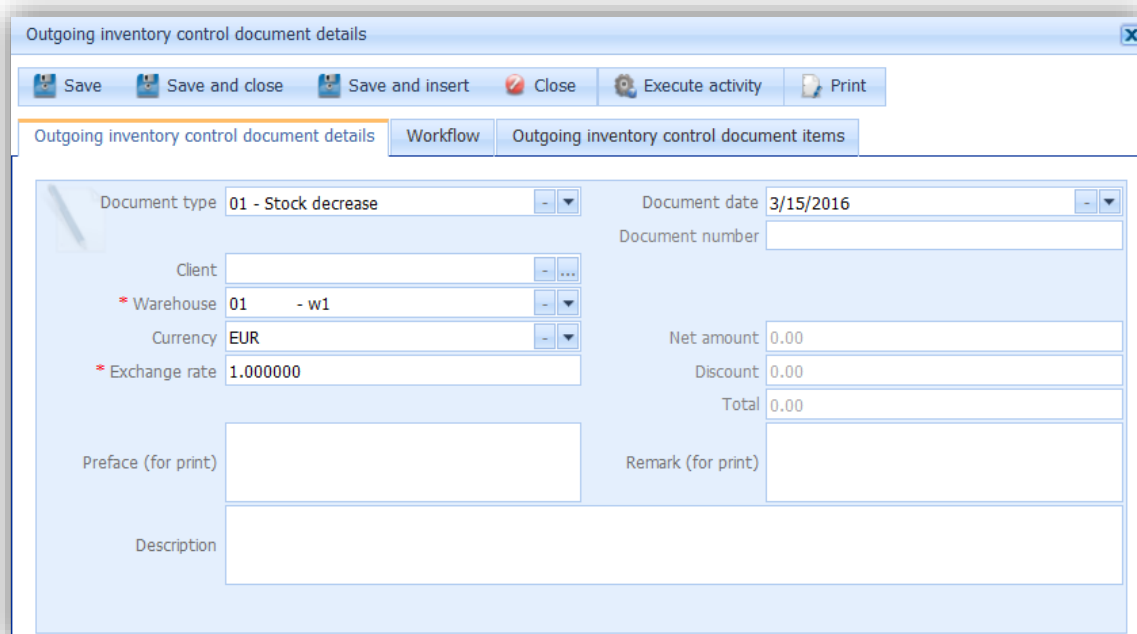
Figure 34: Outgoing inventory control document details

3. Press on the "Outgoing inventory control document items" tab

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4. Press the "Add" button
5. Fill in the entry form as follows:

Choose a product/service.The unit incoming price field will be equal to the wholesale price of the item or it will be set to zero if WP is not defined. Enter the quantity and press one of the saving options. Repeat this process for adding all additional items to this document.
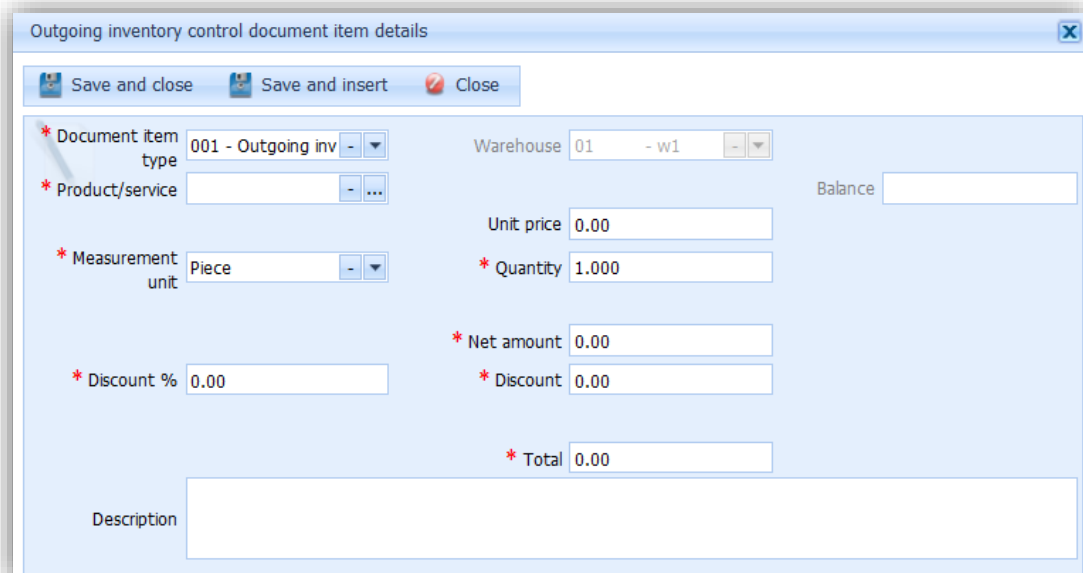
Figure 35:Adding a outgoing item

6. To finish your document press on the "Submit" from the "Execute activity" drop-down menu
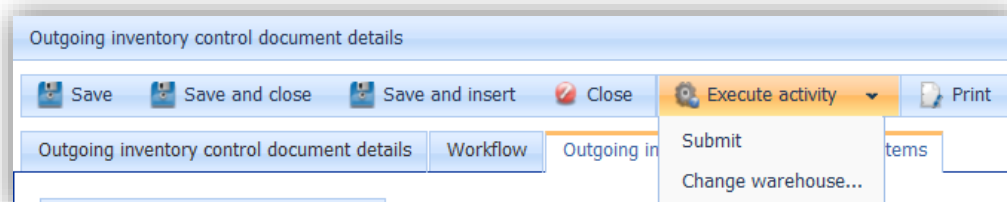
Figure 36: Submitting the document

Goods transfer

From the main menu select: Inventory control→ Inventory control documents → Goods transfer

Goods transfer represents an inventory control document for recording the transfer of goods between warehouses of the company. This document is equal to the goods incoming and to the goods outgoing document for two warehouses, respectively. The following steps will lead you trough creating a goods transfer document:

1. Press the "Add" button

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2. Fill in the entry form as follows:

Choose document type, involved warehouses and date of the document. When you are done, press the "Save" button.
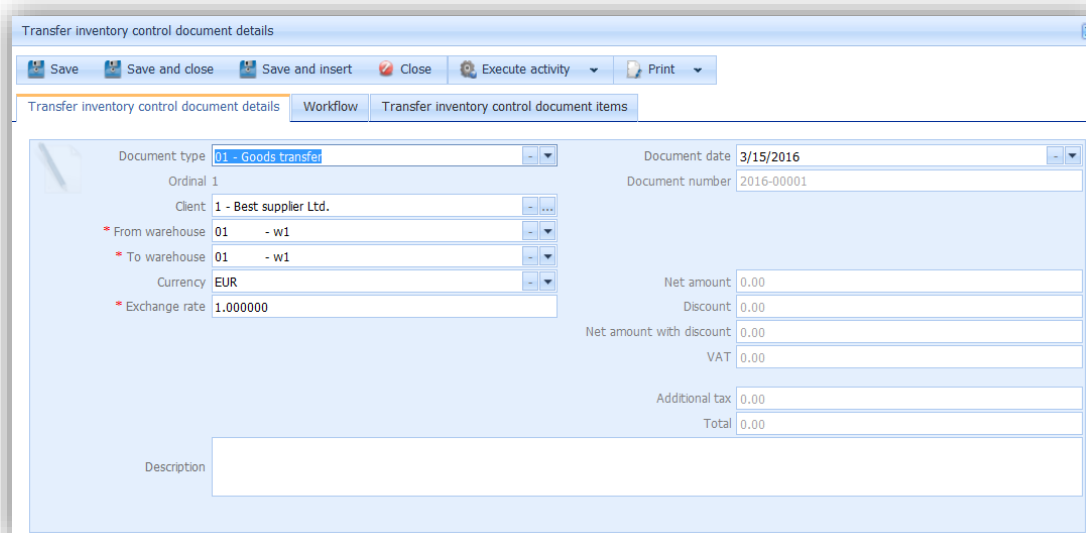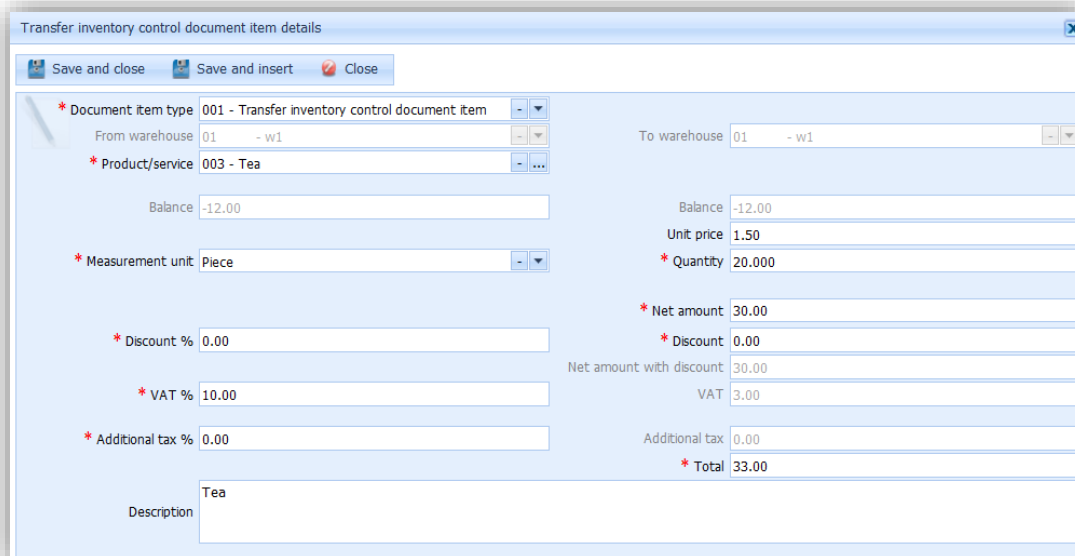
Figure 37: Transfer inventory control document details

3. Press on the "Transfer inventory control document items" tab
4. Press the "Add" button
5. Fill in the entry form as follows:

Choose a product/service. If defined, your item will have its tax and unit price fields filled. Note that the unit price field will be equal to the wholesale price of the item or it will be set to zero if WP is not defined. Enter the desired quantity and any other optional field and press one of the saving options. Repeat this process for adding all additional items to the document. Also, notice the uneditable balance field, it represents your outbound warehouse balance.

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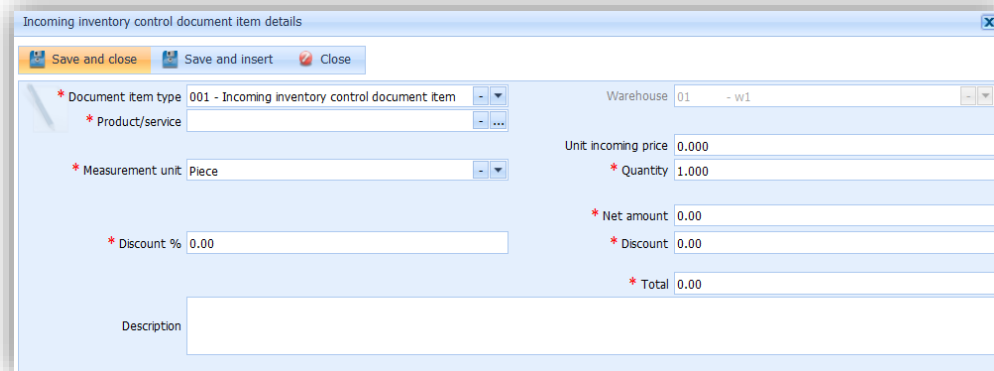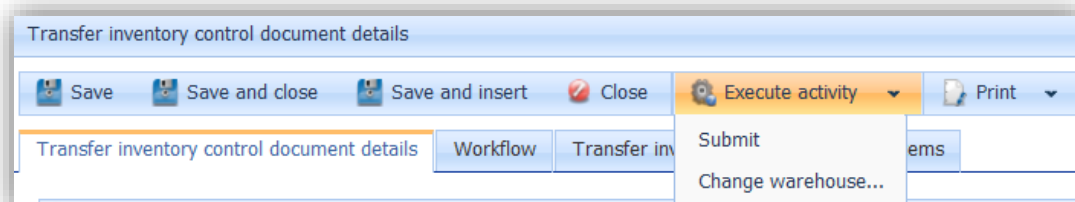
Figure 38: Adding a transfer item

6. To finish your document press on the "Submit" from the "Execute activity" drop-down menu

Figure 39: Submitting the document

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Recipes

From the main menu select: Inventory control → Definitions →Recipes

A recipe is used for product/service which is made of multiple input items. The following steps will lead you trough creating the recipe:

1. Press the "Add" button
2. Fill in the entry form as follows:

Choose your output product service and set the dates the recipe is valid from and valid to. Save the entry form.
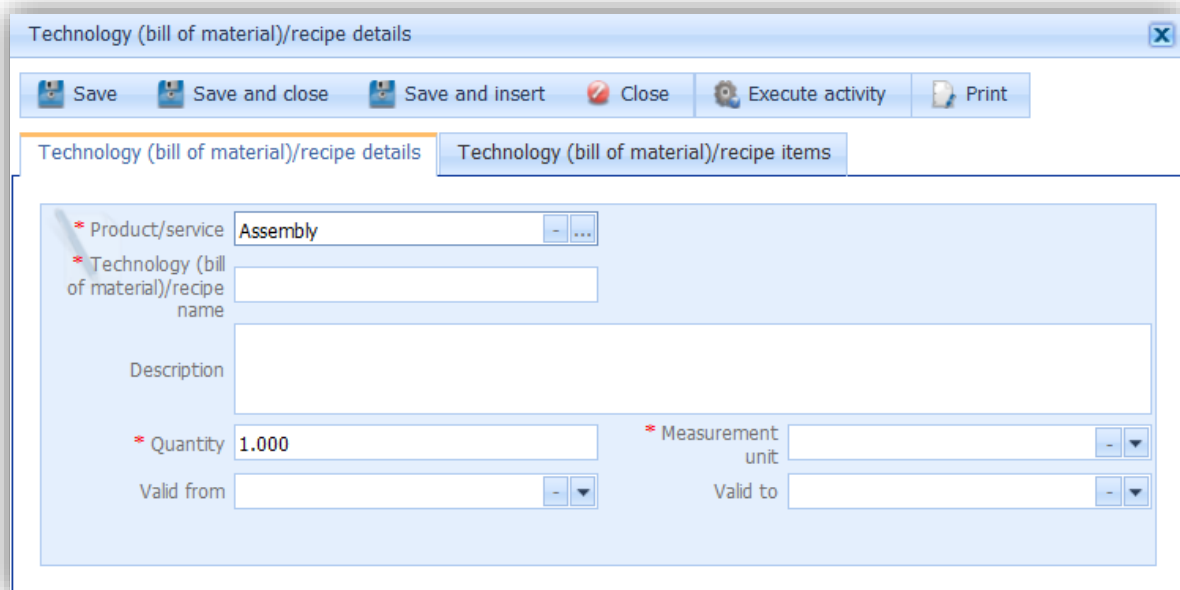
Figure 40: Creating a recipe

3. Press on the "Technology (bill of material)/recipe items" tab
4. Press the "Add" button
5. Fill in the entry form as follows:

Choose a component. Enter its quantity which is needed for the final product. Save the entry form and repeat the process for all other components.

6. To finish your recipe press on the "Submit" from the "Execute activity" drop-down menu

Note that your final product will always have its warehouse balance equal to zero and you will have warehouse decreases for its components accordingly to its recipe.

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Reports

From the "Reports" module you can review details of all issued invoices by various categories such as "Invoice summary by tax" and "Invoice summary by payment type". Every opened review can be printed by clicking the print symbol or saved by clicking the save symbol.

Figure 41: Reports

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Figure 42: Report example

Financial

The "Financial" module encapsulates all financial documents in one place. Here you will find all incoming and outgoing invoices, your submitted offers and all other reports mentioned in the previous section.

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Figure 43: Example of the invoice summary

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Buisness intelligence

The "Buisness intelligence" module is a set of methodology and concepts for collection, analysis and distribution of information obtained with the help of various software tools. All your data is collected through time and processed, in order to give you a crucial data about your business. With business intelligence, you can easily keep track of the things like the most popular sales items or most effective employees either on a yearly, monthly or daily basis. Along with a tabular display, a graphical display of the data is also available. With the drag and drop method, you can choose which parameters are displayed.

Figure 44: Example of the product/service sales tabular data

Figure 45: Example of the revenue chart data

Android application v.017

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Launching a device and the AdeoPOS application

Figure 46: The AdeoPOS application icon

1. Lenovo tablet

Hold the **power button** to turn on a device. Once the device is up you should see a password field. The initial password of the supplied device is **0000**. Enter the password to unlock the device screen.

In order to work with the application, the device must be connected to the internet.

The device can establish the internet connection in two ways:

- Using a WiFi connection
- Using a M2M/SIM 3G cellular connection

The next step is to find the application icon, Figure 46. After launching the application, you should see the login form. Enter your user account data and press the **Login** button.

After successful registration, you should see the user interface of the application.

2. All-in-one

Hold the **power button** to turn on a device. Once the device is up you should see a password field. The initial password of the supplied device is **0000**. Enter the password to unlock the device screen.

In order to work with the application, the device must be connected to the internet.

The device can establish the internet connection in three ways:

- Using a WiFi connection
- Using a M2M/SIM 3G cellular connection
- Using an Ethernet cable connection

The next step is to find the application icon, Figure 46. After launching the application, you should see the login form. Enter your user account data and press the **Login** button.

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With All-in-one device, you can log in with your RFID card using a device built-in RFID card reader. The RFID card reader is placed top-right on the device. You must associate an RFID card with your user account using the AdeoPOS Cloud application.

After successful registration, you should see the user interface of the application.

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First steps with the application

The AdeoPOS application together with the hardware equipment serves as the fiscal cash register. Accordingly, application starting view is the Registry module. Since the application is running with the support of the AdeoPOS Cloud application, through which all the important options are set, it is ready to issue fiscal receipts.
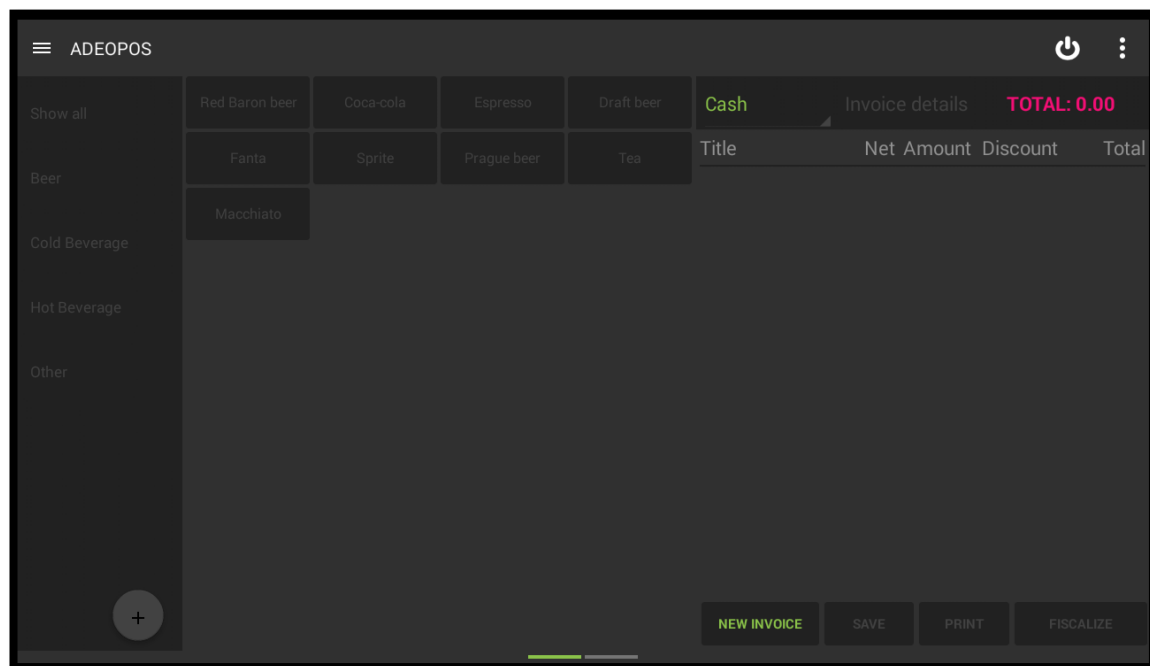
Figure 47: Starting view

The main toolbar of the user interface

Figure 48: The main toolbar

Figure 48 shows the main toolbar which is visible in all applications views. It contains the **main menu** and **utility menu**, which helps to switch through various application modules and set additional options. Also, it contains the **logout** button.

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Main menu button	Logout button	Utility menu button

Main menu

The main menu can be opened by pressing its button. The main menu allows movement through seven different application modules and their displays. The first menu item named REGISTRY is starting and main application module. You can also see other menu items through whose options and displays we will go soon in separate chapters, Figure 49.
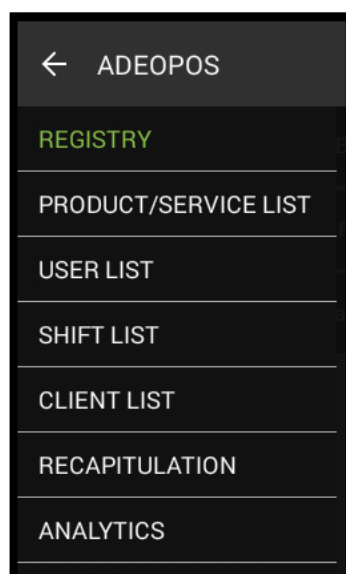
Figure 49: Main menu

Utility menu

The utility menu can be opened by pressing its button. It offers user with three possible selections whose details we will discuss in its own chapter, Figure 50.

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Figure 50: Utility menu

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Registry

! **To be able to issue invoices from the REGISTRY module, first you need to open the work shift from the** Shift list **module.**

Select the REGISTRY from the main menu.

The registry module consists of two screens which can be changed by sliding finger movements to the left and to the right. From the left-hand screen, you can search for and add an item to the invoice in drafting, Figure 51. You will also perform all other things related to invoicing from the left-hand screen. The screen to the right is used to check all the invoices that have been issued or stored, Figure 52.

The AdeoPOS application supports two ways of searching for an item.

These are:

- Tellers??type where items are selected from the screen
- Search by item name or code

Application is initially set to tellers??type and the chapters that follow will be explained with its use.

Search by item name or code mode has all options identical except the difference in searching and adding items. It enables different search methods by changing the appearance of the first screen. This mode is recommended for use with a barcode reader. For more about this mode, see the section Search by item name or code.

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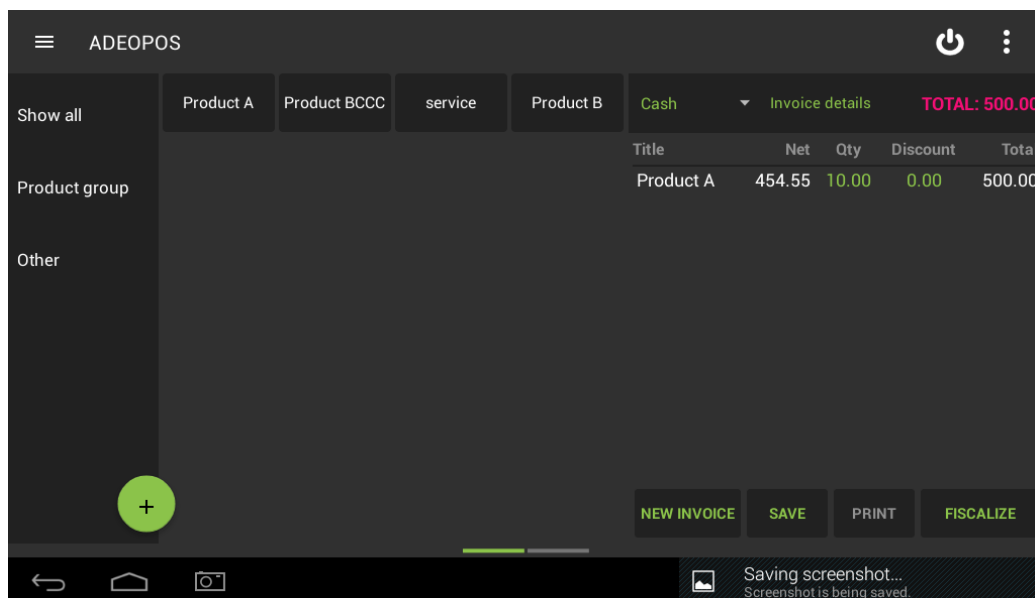
Figure 51: Left screen of the Registry module
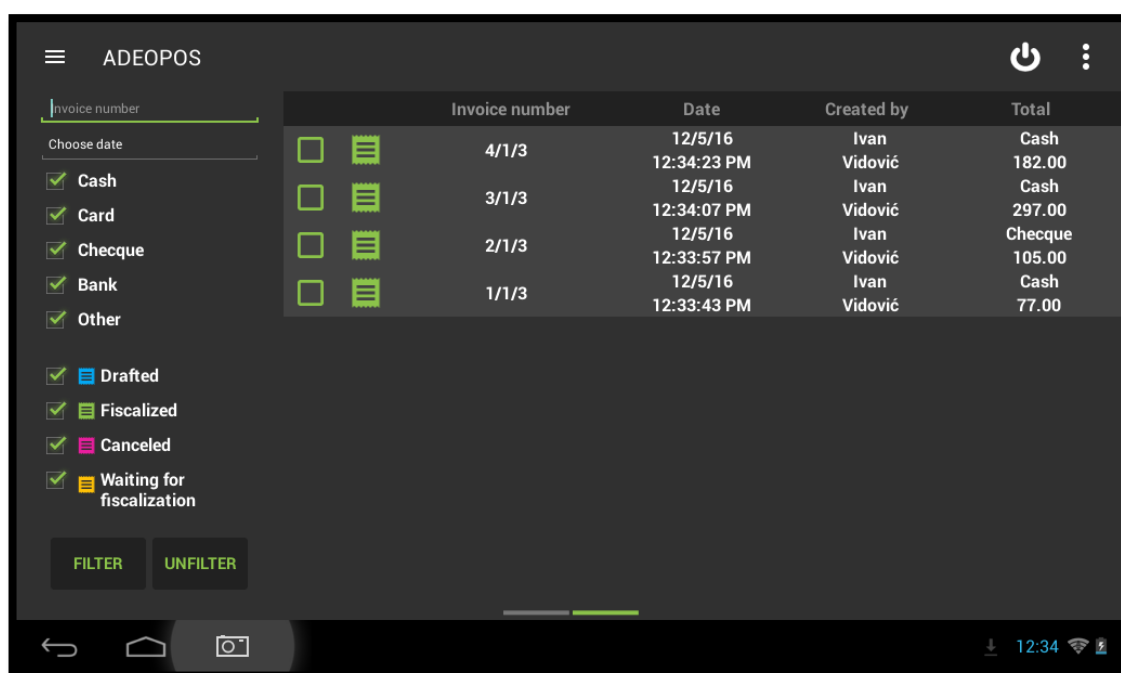
Figure 52: Right screen of the Registry module

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Creating the invoice

Invoice creation is made from the left-hand screen of the **Registry** module, Figure 51. On the left-hand side of the screen there are items and item groups, while on the right-hand side you can see added items inside of invoice in preparation, Figure 53. Invoice in preparation provides an overview of the added items and by pressing its interactive fields, we can set up various properties. Pressing the part titled **Cash** it is possible to change payment method which is initially set to cash payment. Similarly, pressing the part titled **Details** it is possible to add one or more of the following options to the invoice: client, remark and an additional discount on the entire invoice. Pressing the numbers below the titles **Count** and **Discount** you can determine the amount and the discount for the selected item. At the very bottom operations to finish the invoice are offered. These are:

- ▪ **New invoice** – Starts a new invoice
- ▪ **Save** – Saves the invoice for later use
- ▪ **Print** – Prints the invoice for the preview
- ▪ **Fiscalize** – Starts fiscalization for the invoice, prints it and starts a new invoice.

Saved and fiscalized invoices can be found on the right-hand screen of the Registry module, (Figure 7).

If you select an invoice on the right-hand screen you can work on it again from the left-hand screen. For example, a fiscalized invoice can be canceled, and saved invoice can be modified and fiscalized.

Figure 53: Invoice in the preparation and its interactive fields

The right-hand screen provides searching methods for the invoices and an overview of their statuses. Invoice status is an important feature which has the purpose of showing us whether the invoice was successfully fiscalized or some error happened during the process. Invoice status is represented with following symbols and their meaning,

Figure 54.
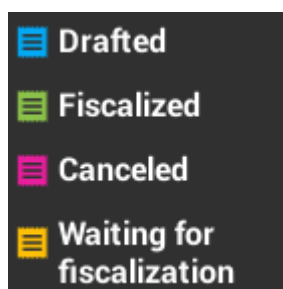
Figure 54: Invoice status

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Adding the item and changing its quantity

The item is added to an invoice by pressing the button with the name of the item. For adding more of the same item you can repeatedly tap its name or you can simply press the number below title **Qty** inside of the invoice in preparation. By pressing the number, you can enter the exact quantity of the selected item. An example of adding and changing quantity is shown by the following figures.
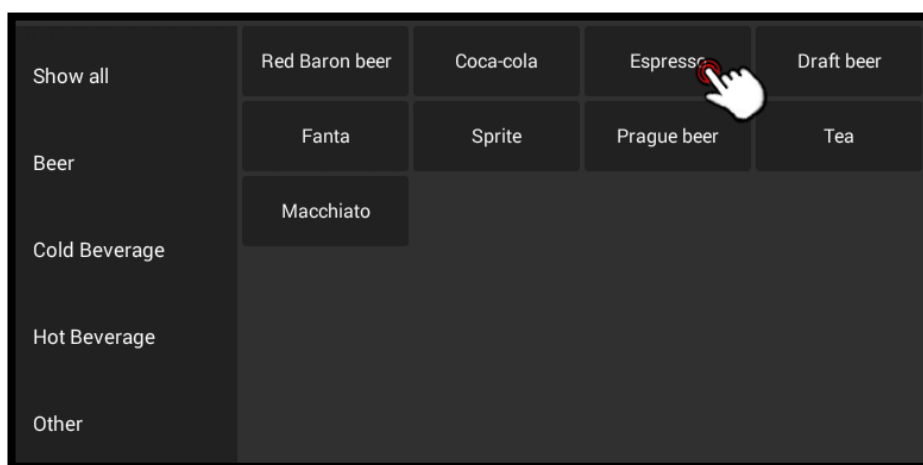
Figure 55: Adding the item

Figure 56: Added item

Figure 57: Changing the quantity (long press on the QTY)

Figure 58: Entering a new quantity

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Cash	▼	Invoice details		**TOTAL: 500.00**
Title	Net	Qty	Discount	Total
Product A	454.55	10.00	0.00	500.00

Figure 59: New quantity

For easy orientation in case of many available items, you can tap a group of products/services to which the item belongs. You will see all the items previously placed in this group from the Cloud application. In the following figures it is shown how pressing the group "GRUPAAA" the only items that belong to it remain displayed.

Figure 60: Selecting the group

Figure 61: Items of the group

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Adding a previously undefined item to the invoice

At the bottom-left corner of the first screen, you can find a button for adding a previously undefined item, Figure 62. Pressing the button will open the entry form. Fill the form data and save it in order to add a new temporary item to the invoice. A demonstration example can be seen in the following figures.

Figure 62: Button for adding a previously undefined item

Figure 63: Entry form for a new temporary item

Figure 64: Temporary item added to the invoice

It is possible to use an existing item as a template for entering data about the item.

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Deleting an item from the invoice

To delete an item from the invoice in preparation, you must press and hold the item name either on the invoice in preparation or in the area from which items can be added. The item will be removed regardless of the quantity. Two ways of deleting an item are shown below.

Figure 65: Deleting an item by pressing its name on the invoice in preparation
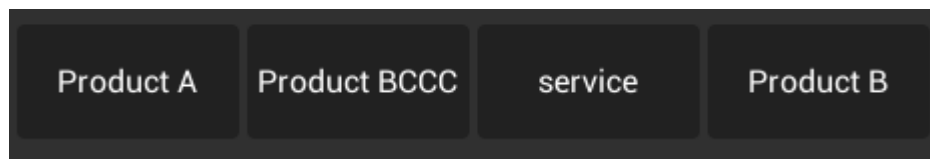
Figure 66: Deleting an item by pressing its name

Figure 67: The result of deleting an item

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Choosing the payment method

The initial payment method is set to cash payment. To change the payment method, press the title **Cash** on the top of the invoice in preparation and choose the desired method from the drop-down menu. In the following example, payment method was changed to payment by bank card.

Figure 68: Pressing the initial payment method in order to change it

Figure 69: Choosing the desired payment method

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Figure 70: Desired payment method

Discount for the item

In order to enter a discount for a particular item, press the number under the title **Discount** inside of the invoice in preparation. Enter the discount as a percentage and confirm your changes. In our example, a discount of 50 percent is added to the Product A item.

Figure 71: Changing the discount value for the desired item

Figure 72: New discount as a percentage

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Figure 73: The result of the added discount

Additional discount

An additional discount applies to all invoice items. In order to enter the additional discount, first press the title **Details** at the top of the invoice in preparation and then press the line near the title **Additional discount** inside a newly opened entry form. Enter the desired amount of additional discount as a percentage and press the **Save** button to confirm the changes. The additional discount is removed by pressing the **X** button next to it inside the details entry form and confirming the changes by pressing the **Save** button. Following example sets the additional discount value of 50 percent.

Figure 74: Pressing the Invoice details in order to set an additional discount

Figure 75: Setting the additional discount of 50 percent

Figure 76: The result of the applied dicount

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R1 invoice

Precondition for entering a client to the invoice is that the client is previously entered in the application. You can add a client either from the Cloud or Android AdeoPos application. For more information about how to add a client see the chapter Client list.

In order to enter the client to the invoice, first press the title **Details** at the top of the invoice in preparation and then press the line near the title **Client** inside a newly opened entry form. Enter the client and press **Save** to confirm the changes. The client is removed from the invoice by pressing the **X** button next to it inside the details entry form. Accessing the entry of client form is equal to accessing the additional discount entry form.

Adding a remark to the invoice

In order to enter a remark, first press the title **Details** at the top of the invoice in preparation and then press the line near the title **Remark** inside a newly opened entry form. Enter the desired remark and press **Save** to confirm the changes. The remark is removed by pressing the **X** button next to it inside the details entry form and confirming the changes by pressing the **Save** button. Accessing the remark entry form is equal to accessing the additional discount entry form.

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Fiscalization of the invoice

When you have added all desired items you can issue the invoice by pressing the **Fiscalize** button at the bottom of the invoice in preparation. The invoice will be printed and sent for fiscalization. Automatically a new empty invoice will be shown and you can continue with issuing of invoices. Properly fiscalized invoice will get its **ZK** and **JIR** numbers, which will be printed on the invoice. In case of unavailability of internet connection, your invoice will get the status **waiting for fiscalization**. You can see your invoices and their statues in the right screen of the **Registry** module. For more details on the invoice status, read the section <u>Invoice status</u>.
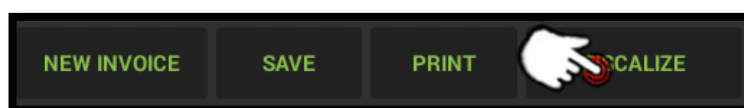
Figure 77: Pressing the Fiscalize button in order to issue an invoice

Saving the invoice

You can save the invoice for later proceeding by pressing the **Save** button at the bottom of the invoice in preparation. After you press the Save button your invoice will still be marked as active, therefore if you want to create a new invoice it is important to press the **New invoice** button. You can select any of saved invoices in the right-hand screen of the **Registry** module and continue your work on it from the left-hand screen of the **Registry** module.
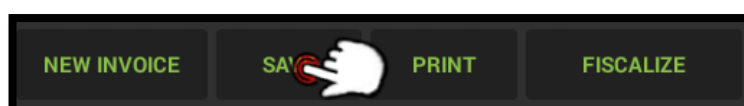
Figure 78: Saving the invoice

In order to delete an unused saved invoice, you must mark it as active and press Delete button as shown in the figures below.

Figure 79: Marking the saved invoice

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Figure 80: Deleting the saved invoice

The print button

You can preview your invoice by pressing the print button. The invoice will be printed out and it will stay unchanged. If you want to issue the invoice, press the Fiscalize button. If you want to save the invoice for later proceeding, press the Save button.
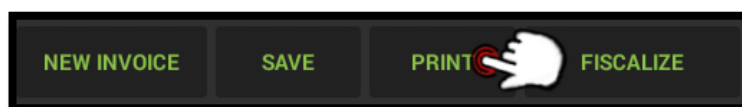
Figure 81: Printing the invoice for preview

The new invoice button

Pressing the **New invoice** button clears all set options and items of the invoice in preparation.

Fiscalization of the invoice creates a new invoice as well.
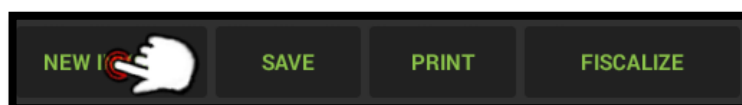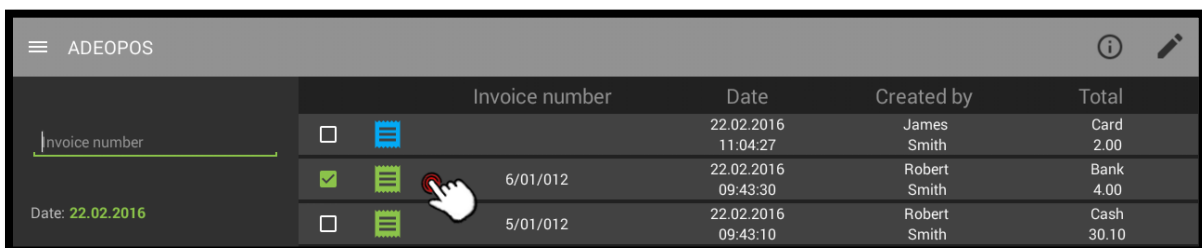
Figure 82: Creating the new invoice

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Canceling the invoice

In order to cancel the fiscalized invoice, you must mark it as active on the right screen of the **Registry** module and press the **Cancel** button, which is found at the bottom of the invoice in preparation, instead of the **Fiscalize** button. This operation will fiscalize the invoice with the negative value of the selected invoice and the selected invoice will get a status **Canceled.**

Figure 83: Selecting the fiscalized invoice

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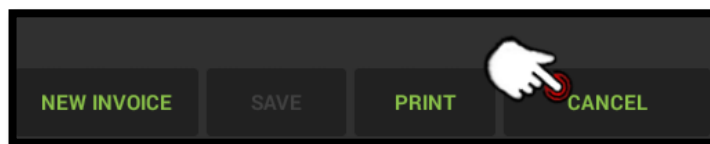
Figure 84: Canceling the fiscalized invoice

Figure 85: Succesfully canceled invoice with its negative twin
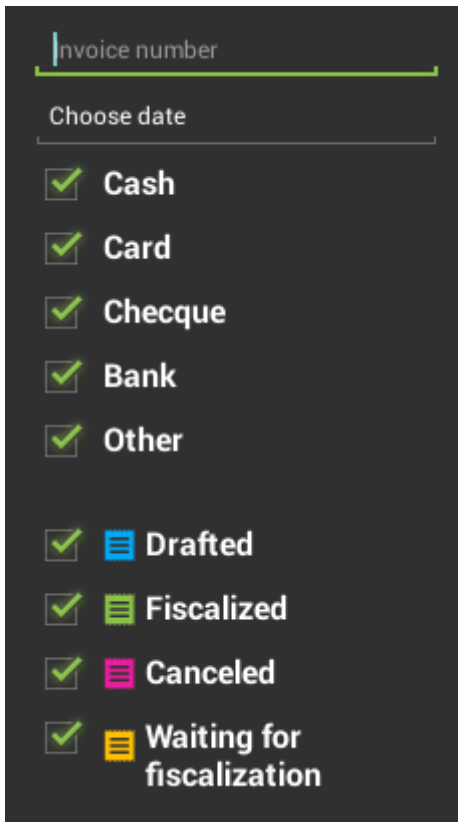
Searching for the invoices

Saved and fiscalized invoices can be found on the right-hand screen of the Registry module. Initially, you will see all the invoices with the current date. You can search for any issued or saved invoice with the following options:

- The number of the invoice – Press on the provided field and enter the invoice number
- The date of the invoice creation – Press on the current date and choose another one

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- The payment method – You can filter displayed invoices by pressing provided checkboxes
- The status of the invoice – You can filter displayed invoices by pressing provided checkboxes

The interactive fields for searching are shown in the following figure.

Figure 86: The interactive fields for searching

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Invoice status

The invoice status is represented with the following labels and their meaning:

- Saved –Successfully saved invoice
- Fiscalized –Successfully fiscalized invoice
- Canceled –Successfully canceled invoice
- Waiting for fiscalization – The invoice will get this status in case of internet connection problem. It will be automatically fiscalized if the connection is restored within 48 hours.
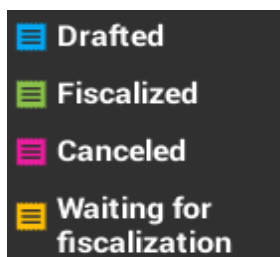
Figure 87: The invoice status icons

! **If the invoice is in the status Waiting for fiscalization do not forget to check your internet connection**.

Information about the invoice

It is possible to see the information about any saved or fiscalized invoice from the right screen of the Registry module. In order to see it, you must mark it as active and press the **Info** button as shown in the figures below.
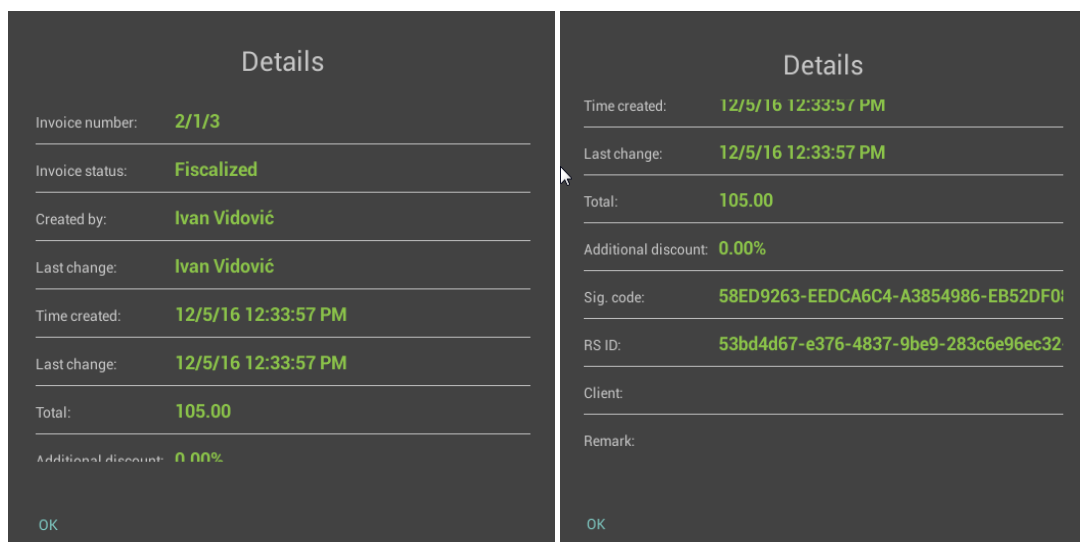
Figure 88: Marking the invoice

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Figure 89: Pressing the info button

Figure 90: The invoice information

Changing details of the fiscalized invoice

It is possible to change the client only and remark fields on the fiscalized invoice. In order to do so, you must mark it as active and press **Details** button as shown in the figures below. Fill in the desired changes and press the **Save** button.

Figure 91: Pressing the details button

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phone+385 1 660 38 21 **email** info@neoinfo.hr **web** www.neoinfo.hr
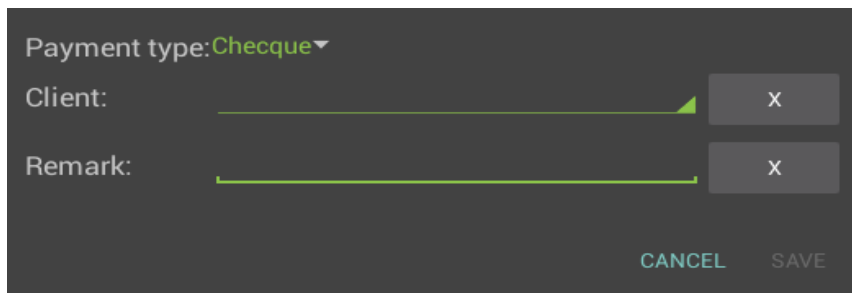
Figure 92: Entry form for changing details

Search by item name or code

To turn this option on, you have to press the **Utility** menu button and select the **application settings** from its drop-down menu. Inside the application settings switch the sliding button next to the title Search by item or name to the **tick** value and confirm your changes.
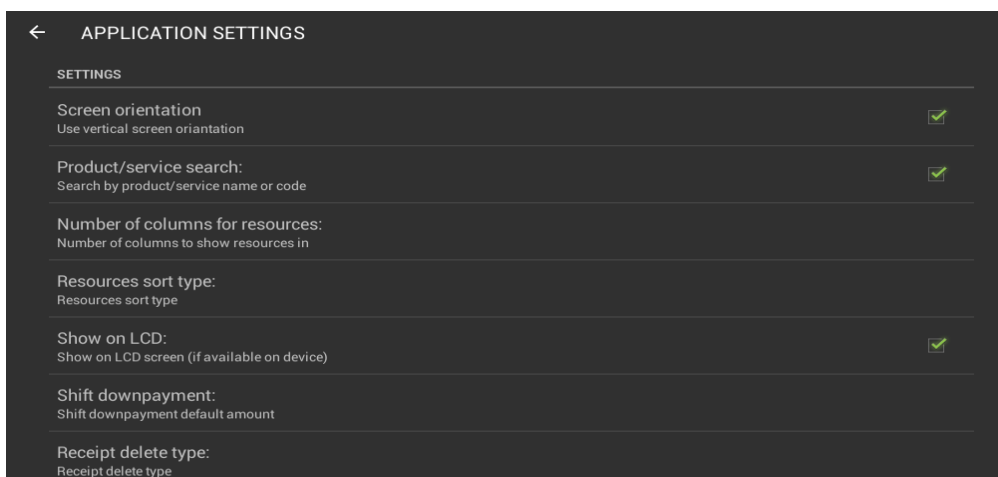
Figure 93: Application settings

Search by item name or code mode has all options identical except the difference in searching and adding items. It enables different search methods by changing the appearance of the first Registry module screen. This mode is recommended for use with a barcode reader.

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phone+385 1 660 38 21 **email** info@neoinfo.hr **web** www.neoinfo.hr
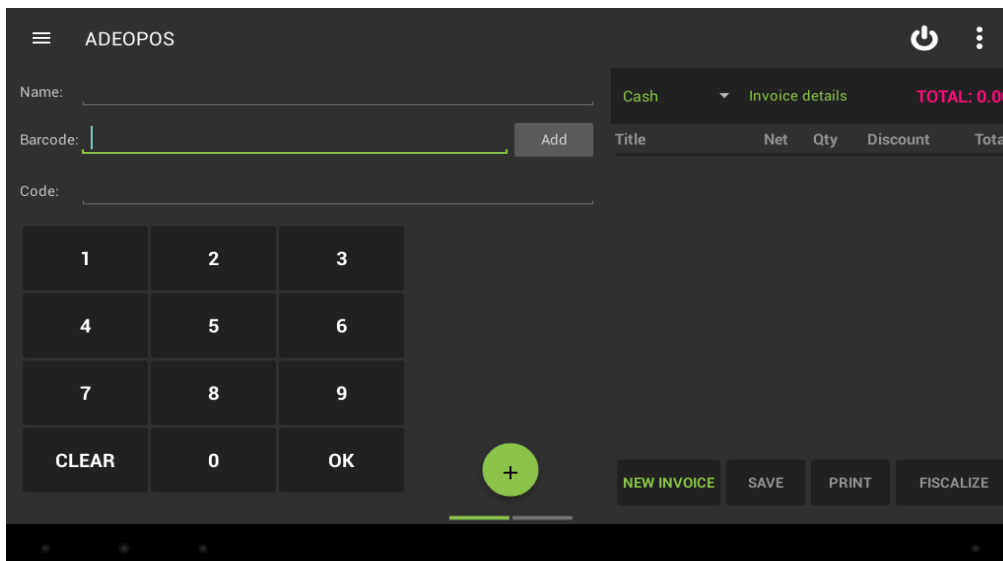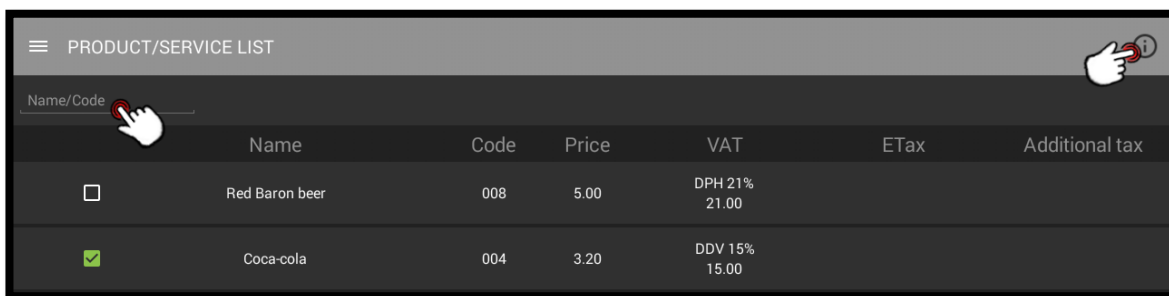
Figure 94: Appearance of the first registry module screen for the search by item name or code mode

Scanning the item with the barcode reader automatically appends it to the invoice in preparation. Defining the barcode for the item is done using the Cloud application. It is possible to enter the item code by hand with the presented numeric keypad and even enter the item name or barcode by pressing the lines next to the titles using the newly opened keyboard.

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Product/Service list

Select the **PRODUCT/SERVICE LIST** from the main menu.

In this module, the list of all items is displayed. Items are added from the AdeoPos Cloud application. If necessary, you can navigate through the list by sliding finger movements up and down. It is possible to find an item by its name or code from the provided field. Pressing the provided field will open the keyboard. It is possible to see the information about any item by marking it as active and pressing the **Info** button as shown in the figures below.

Figure 95: Product/Service list with the marked item

Figure 96: Information about the marked item
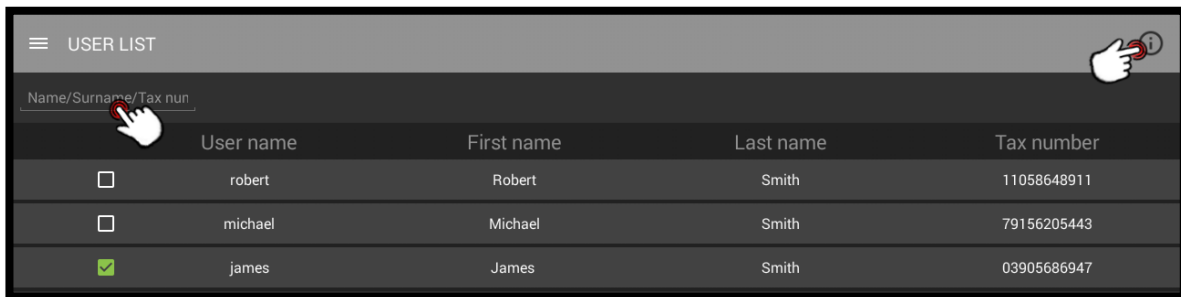
Neoinfo Ltdfor computing, trade and services **VAT number** 62453877529
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phone+385 1 660 38 21 **email** info@neoinfo.hr **web** www.neoinfo.hr
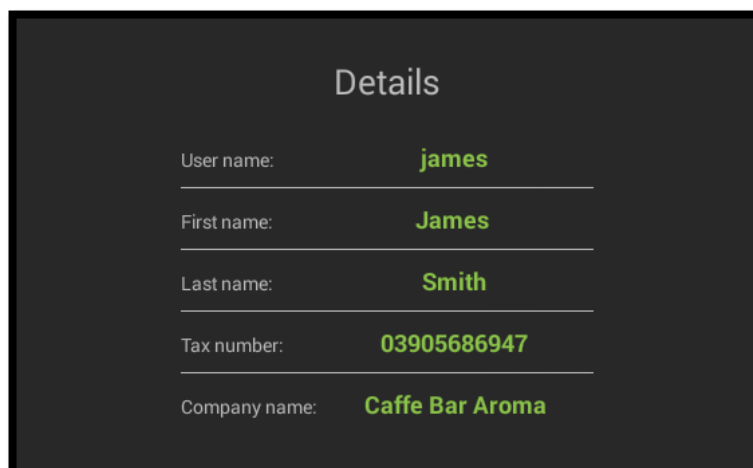
User list

Select the **USER LIST** from the main menu.

In this module, the list of all employees is displayed. Employees are added from the AdeoPos Cloud application. If necessary, you can navigate through the list by sliding finger movements up and down. It is possible to find an employee by its first name, last name or VAT number from the provided field. P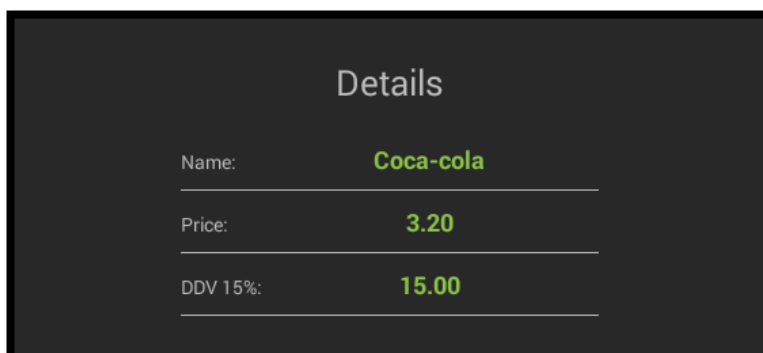ressing the provided field will open the keyboard. It is possible to see the information about any employee by marking it as active and pressing the **Info** button as shown in the figures below.

Figure 97: User list with the marked employee

Figure 98: Information about marked employee

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Shift list

Select the **SHIFT LIST** from the main menu.

In this module, the list of all work shifts and their statuses is displayed. Only one shift can be in the status OPENED. You must have an opened shift in order to issue an invoice. From this module following things can be done:

1. Opening the work shift
2. Ending the work shift
3. Shift reopening
4. Changing the down-payment of the opened shift
5. Printing the recapitulation for the shift
6. Viewing the information about the shift

The last opened shift will always be at the top of the list, but if you are looking for some older shifts picking the date of the shift from the provided button will be helpful. Press the **Choose date** button to select the date of the displayed shifts. With the nearby button **X,** you can always return to the all shifts preview.

1. Opening the work shift

In order to open the new work shift press the **Plus** button (figure). Enter the down-payment and press the **Save** button. After successful shift opening, you should be able to issue invoices from the Registry module.

Figure 99: Button for the new shift
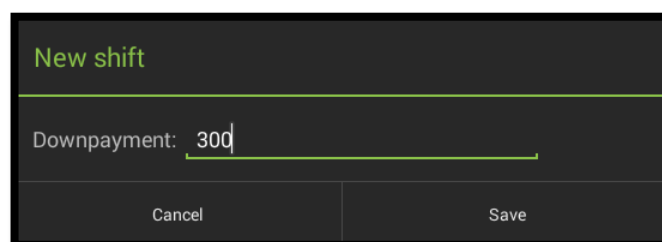
Figure 100: Entering the shift down-payment

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2. Ending the work shift

In order to end the opened shift, you have to mark it as active first and afterwards select **Close shift** from the utility menu.
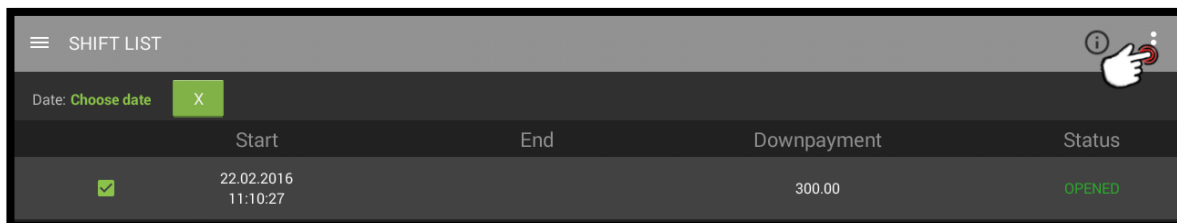
Figure 101: Pressing the utility menu button while the opened shift is marked as active
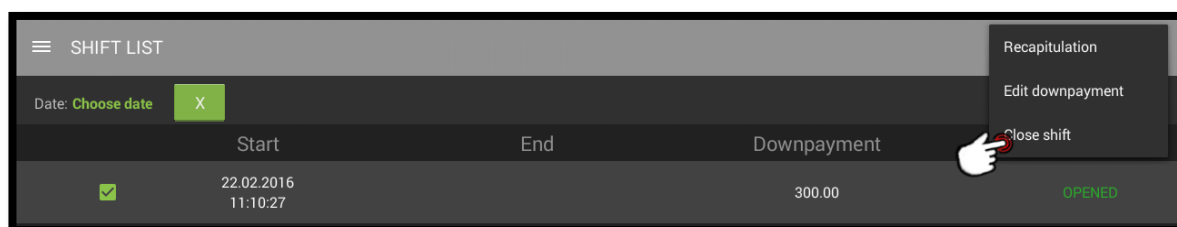
Figure 102: Ending the work shift

3. **Shift reopening**

It is only possible to reopen the last ended shift. To reopen it, mark it as active and select the **Open shift** from the utility menu.
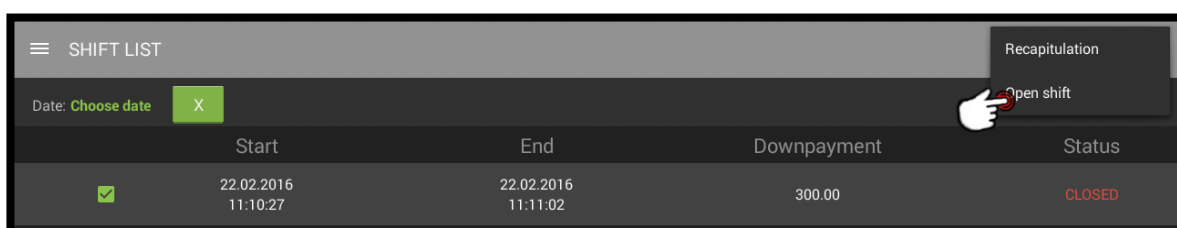
Figure 103: Reopening of the last ended shift

4. Changing the down-payment of the opened shift

To change the down-payment of the opened shift, mark it as active and select the **Change down-payment** from the utility menu. Enter the new down-payment value and press the **Save** button.

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phone+385 1 660 38 21 **email** info@neoinfo.hr **web** www.neoinfo.hr
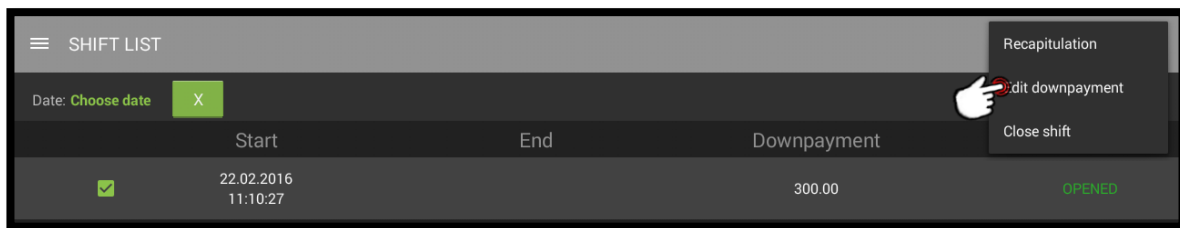
Figure 104: Changing the down-payment of the opened shift

5. Printing the recapitulation for the shift

To print the recapitulation for the particular shift, mark it as active and select **Recapitulation** from the utility menu.
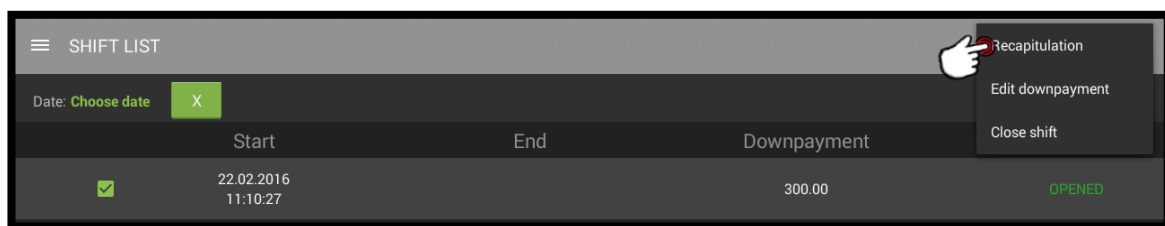
Figure 105: Printing the recapitulation for the shift

6. Viewing the information about the shift

In order to see information about the particular shift you have to mark it as active and press the **Info** button.
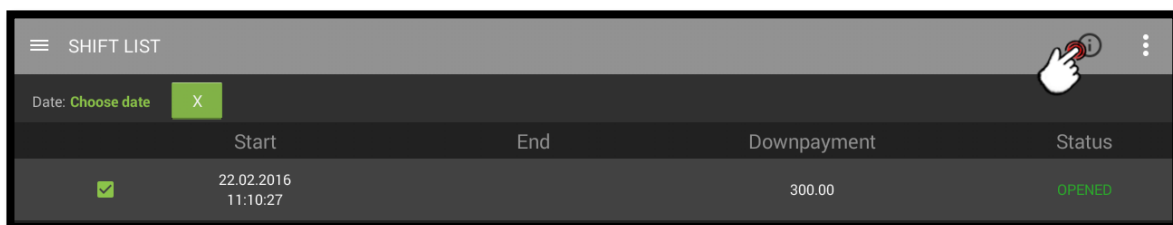
Figure 106: Pressing the Info button

Figure 107: Inforamation about the shift

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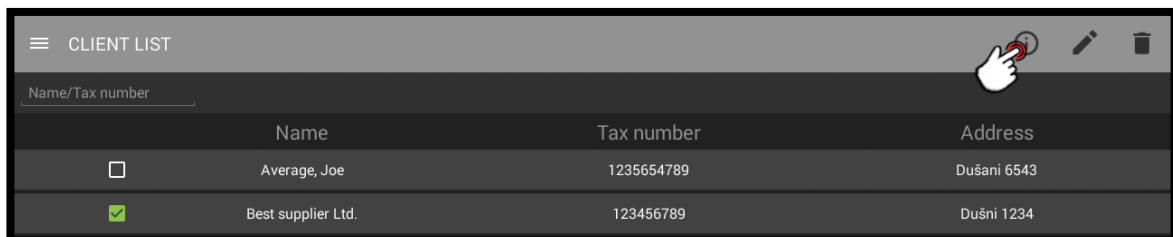
Client list

Select the **CLIENT LIST** from the main menu.

In this module, the list of all clients is displayed. Clients can be added from the AdeoPos Cloud application. If necessary, you can navigate through the list by sliding finger movements up and down. It is possible to find a client by its name or VAT number. Pressing the provided field will open the keyboard. Additionally, from this module following things can be done:

1. Viewing the information for the existing client
2. Editing the client data
3. Deleting the client
4. Adding a new client
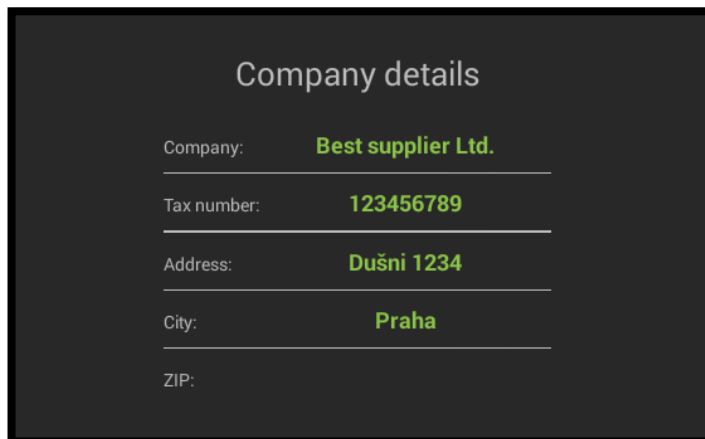
1. Viewing the information for the existing client

To see the information about the client, mark it as active and press the **Info** button. Information about the person or company will be shown.

Figure 108: Pressing the Info button

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phone+385 1 660 38 21 **email** info@neoinfo.hr **web** www.neoinfo.hr
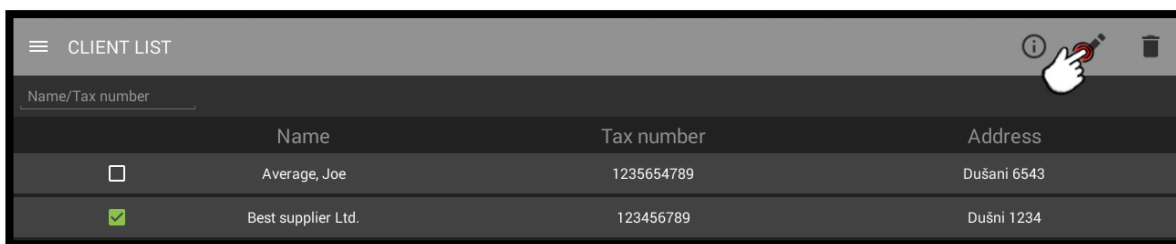
Figure 109: Information about the company
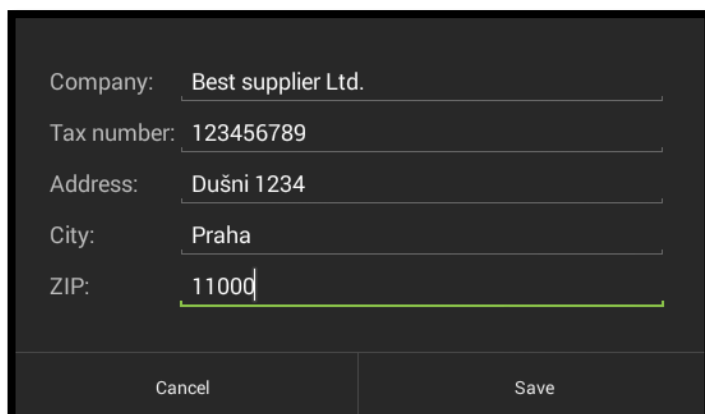
2. Editing the client data

In order to edit the client data, you have to mark it as active and press the **Edit** button. The entry form will pop-up, fill the new client data and save the changes.

Figure 110: Pressing the edit button
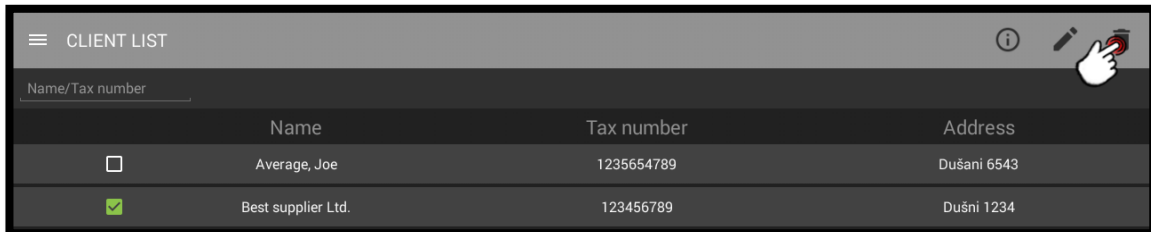
Figure 111: Entry form for editing the client data

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3. Deleting the client

To delete the client, mark it as active and press the **Delete** button. You will have to confirm your intentions in order to complete the deletion.
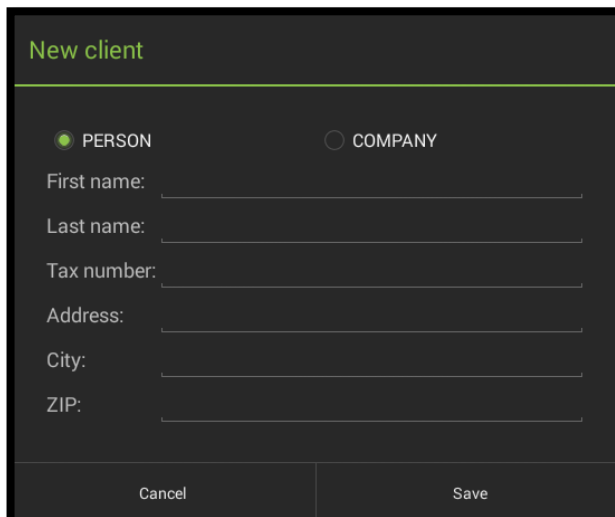
Figure 112: Deleting the client

4. Adding a new client

In order to add a new client, press the **Plus** button (figure). The entry form will pop-up and you can choose whether you want to add a new person or a company. Fill the form data and press the **Save** button. The new client will be added to the client list.
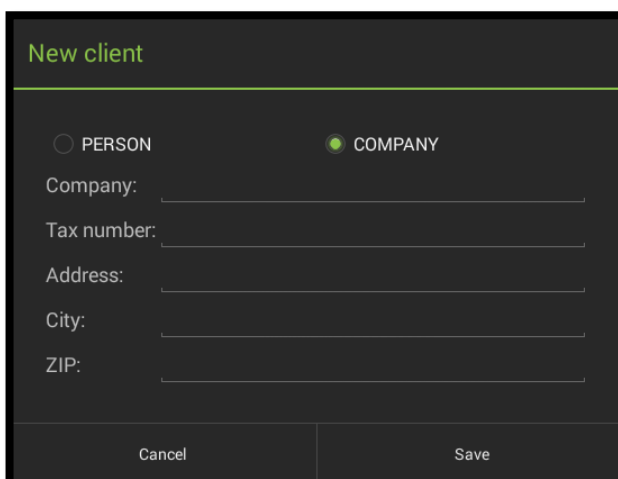
Figure 113: Button for the new client

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Figure 114: New client of the type person

Figure 115: New client of the type company

Recapitulation

Select the **RECAPITULATION** from the main menu.

In order to get a printed recapitulation on the current day, press the **Recapitulation** button. If you wish to print a recapitulation for any date in the past, first press on the current date and after you choose a new one, press the **Recapitulation** button.
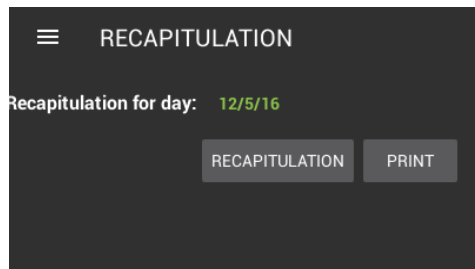
Figure 116: Recapitulation

If you wish to print a recapitulation for the shift, you have to do it from the Shift list module.

Analytics

Select the **ANALYTICS** from the main menu.

The analytics module consists of three screens which can be changed by sliding finger movements to the left and to the right. These screens are displaying graphical sales data for:

1. Top 5 Product/Service
2. Top 5 Product/Service groups
3. Invoice summary by user

Each of the analytics screens is initially set to display data for the current date, but it is possible to display data for any date in the past by pressing the current date and choosing a new one.

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1. Top 5 Product/Service

This chart is showing five items that have the largest share of sales on a particular day. Each item is represented in a different color, with associated percentages. Below the chart you can find its legend.
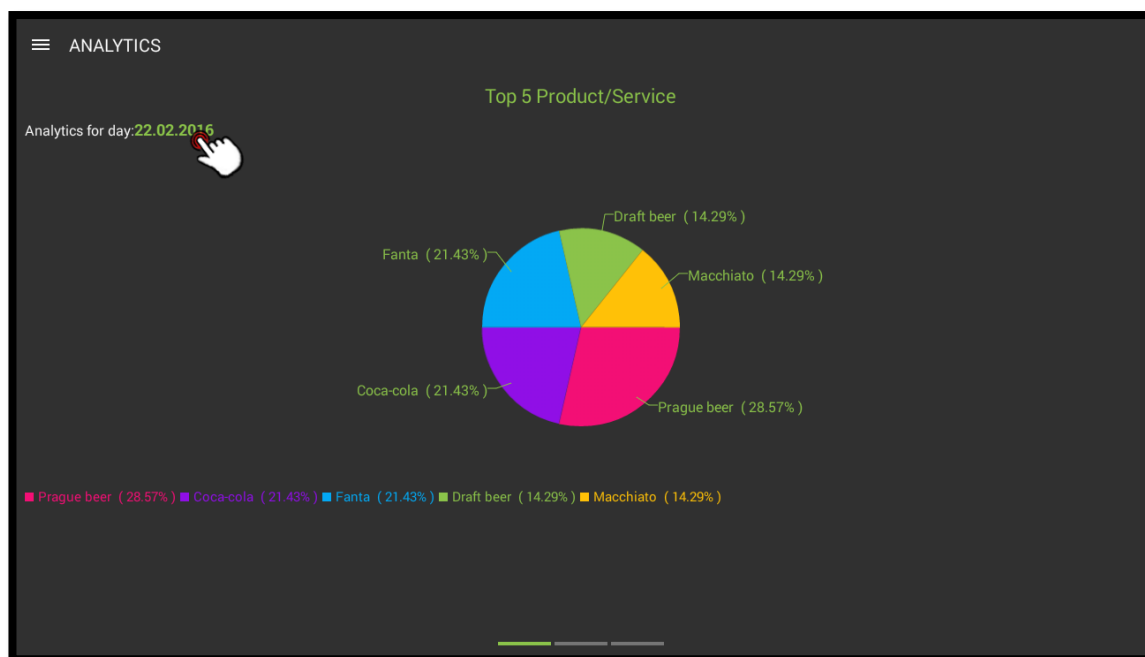
Figure 117: Top 5 items

2. Top 5 Product/Service groups

This chart is showing five product/service groups that have the largest share of sales on a particular day. Each of them is represented in a different color, with associated percentages. Below the chart you can find its legend.

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phone+385 1 660 38 21 **email** info@neoinfo.hr **web** www.neoinfo.hr
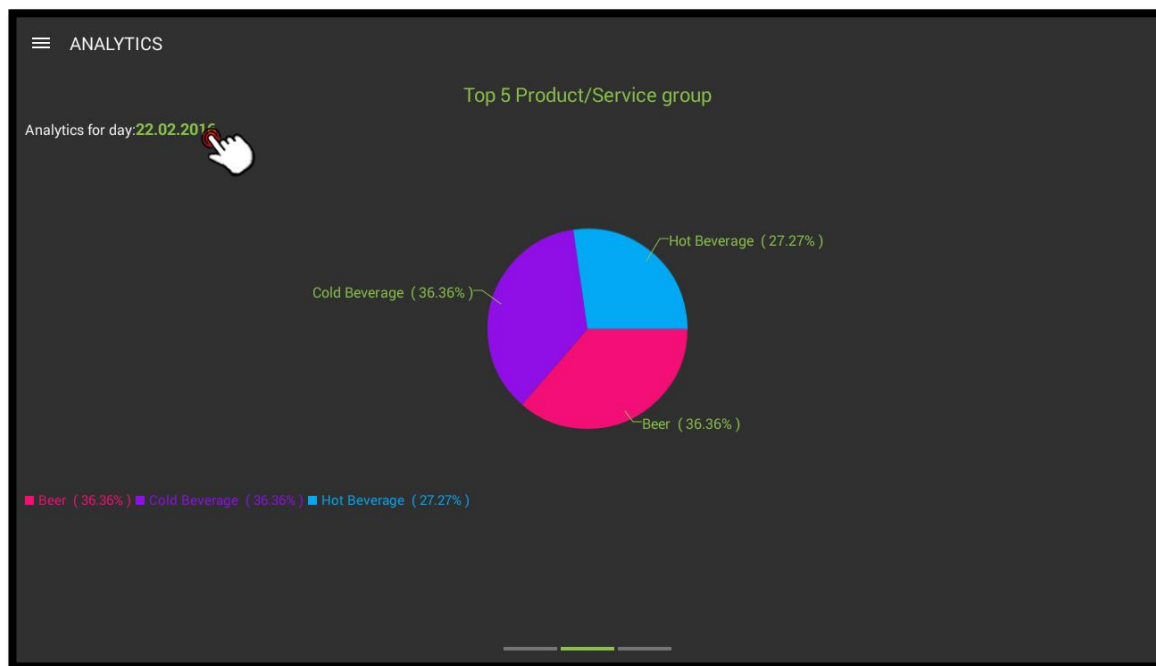
Figure 118: Top 5 product/service groups

3. Invoice summary by user

This chart is showing sales by the employee on a particular day. Each of them is represented in a different color, with associated percentages. Below the chart you can find its legend.
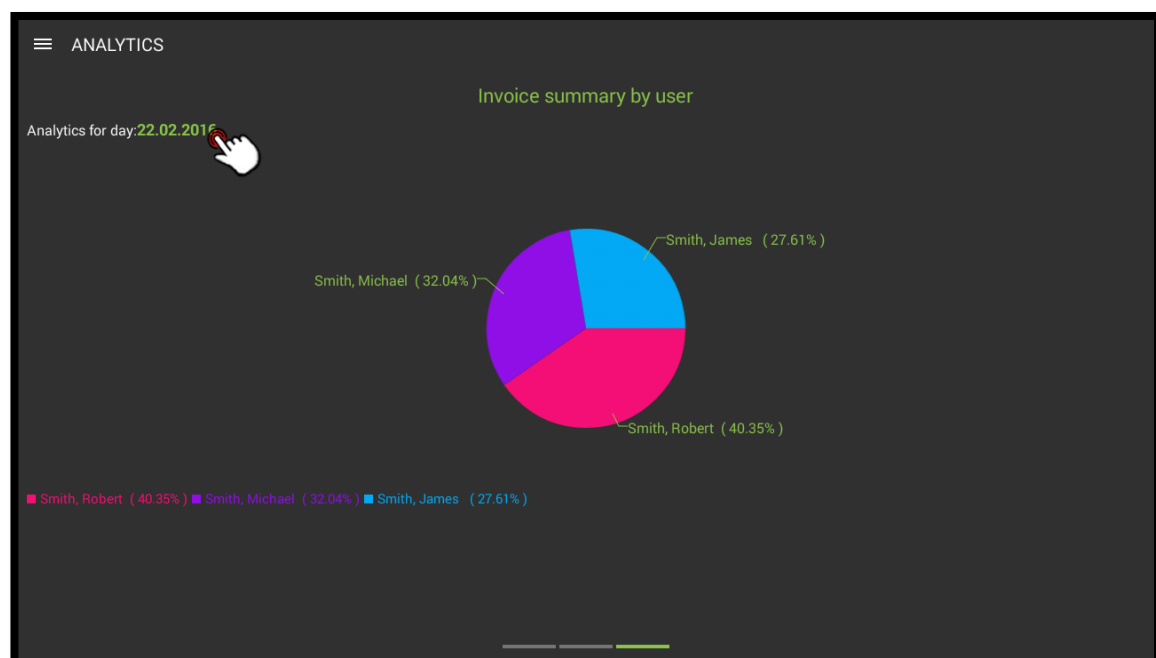
Figure 119: Seles by the employee

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Utility menu

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The **utility menu** can be opened by pressing its button. It offers three possible selections:

1. Run synchronization
2. Application settings
3. Change authentication

In particular situations if same application objects are selected the utility menu can offer same other selections to choose from. Those selections are discussed in the chapters where they appear.

1. Run synchronization

Synchronization with the Cloud application is executed automatically in the particular time interval, but if you want to synchronize some recent changes you can do it by pressing the **Run synchronization** from the utility menu.

2. Application settings

If you press the **Application settings** from the utility menu, the following options will be displayed:

- **Searching by item name or code** – If you switch this option on and confirm your changes, the appearance of the first Registry screen will be changed in the more appropriate form for working with the barcode reader. Switching is done using the nearby ON/OFF sliding button.
- **Screen orientation** - allows you to view the screen from vertical or horizontal perspective
- **Resources sort type** – select between four options: Undefined, Alphabetical order, Code order, Predefined order
- **Receipt delete type –** offers three different options: Older than 7, 30 or 60 days
- **The number of columns to display**– Touch the nearby number in order to change the number of columns for displaying items on the first Registry screen.
  It is possible to show items in 1, 2, 3, 4 or 5 columns.
- **Shift down-payment** – Touch the nearby number to change the offered initial down-payment for the work shift opening (There are no limits for the down-payment within the application, but check if your business has some legal down-payment limitations)
- **Show on LCD** – If your device supports additional LCD screen, you can display the invoice total in it by switching the value of the nearby sliding button to ON.

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In order to confirm your changes press the Confirm button, otherwise press the Cancel button.

3. Change authentication

If you press the **Change authentication** from the utility menu, the following options will be displayed:

1. Change the password
2. Assign the RFID card

1. Change the password

Press the **Change the password** in order to change it. You will have to fill in the following fields:

- Current password
- New password
- New password (repeated)

To confirm your changes press the **Confirm** button, otherwise press the **Cancel** button.

2. Assign the RFID card

Press the **Assign the RFID card** in order to assign it. You will have to fill in the following fields:

- Current password
- Password of the authentication RFID card. It is possible to scan the card instead of typing the password. RFID card reader is found top-right on the All-in-one device.

To confirm your changes press the **Confirm** button, otherwise press the **Cancel** button.