



FAQ POS

How do I launch Aptimyz POS?

1. On the POS till – key in your passcode
2. Tap on the Aptimyz Logo (Retail)

How do I get rid of the on-screen keyboard?

1. Plug in an external keyboard or attach a wifi keyboard
2. Restart the till
3. The system will ask if you want to use the attached external keyboard, tap Yes

Alternatively, if the system is already switched on:

1. Go to the main screen of your equipment
2. Click on Settings or System
3. Language and Input
4. Click on the Physical Keyboard
5. Ensure that the "Show Virtual Keyboard" setting is set to "Off"

How do I perform a Till Lift / Till Withdrawal?

1. Tap **Menu**
2. Tap **Till Cash**
3. Tap **Till withdrawal**
4. Type in the amount withdrawn
5. Add comments (these will print on the Till Transactions report)

How do I Create a Layaway Job

1. From Home POS screen
2. Select **Customer Search**
3. Choose or **Add a Customer**
4. Scan an item
5. Select **Checkout**
6. Select **Layaway**
7. Select **Create New Layaway Job**
8. Take a payment from the customer as a deposit on the goods (if applicable)
9. Tap **Cash or Card** (if payment taken) or *Cancel*
10. Tap **Finish**

How do I add a Layaway payment?

Use this option to either build up a deposit account for customers who may need to spend a lot at one time (Christmas or new school year) or to pay for Layaway items in smaller increments.

1. From Home > Customer Search then Search or Add Customer
2. From Menu Select Add to Account
3. Enter amount paid in by customer, Submit
4. Pay by Cash or Pay by Card
5. Complete Sale

How do I find a Layaway number

1. Either: Scan the original Layaway/Set Aside receipt
2. Or, from Menu > Search > Layaway Search
3. Or, from Home > Customer Search > Select anywhere in the customer window > click on the Layaway tab

How do I Redeem a Layaway

1. Tap **Menu**
2. Tap "Search"
3. Layaway Search
4. Enter the job number
5. Either: Delete the job
6. Re-print
7. Pay for Items using
 - a) Pay by Cash,
 - b) Pay by Card or
 - c) Checkout > From Points
 - d) Checkout > From Account

How do I Add to a Customer's Account

This is for Customer Deposit Accounts only Use this option to either build up a deposit account for customers who may need to spend a lot at one time (Christmas or new school year) or to pay for Layaway items in smaller increments.

1. From Home > Customer Search
2. Then Search or Add Customer
3. From Menu Select **Add to Account**
4. Enter amount paid in by customer, Submit
5. Pay by Cash or Pay by Card
6. Complete Sale

How do I perform a Return

If you have a receipt:

1. Scan the original receipt
2. Choose the item to be returned and Select Return
3. Select the reason (take care to select the correct **Return to Stock** or **Do not return to stock** reason)
4. Select Proceed
5. Close the receipt page
6. Refund by one of the following means – either:
 - a) Exchange item by scanning the barcode of the replacement item
 - b) Refund – Pay by Cash
 - c) Refund – Pay by Card
 - d) Refund – Issue Credit Note
7. Select Checkout
8. Select Issue Credit Note
9. Finish

How do I perform a Return

If No receipt

1. Tap **Menu**
2. Select Sales
3. Find the original sale, if possible
4. Select the *Return *button
5. This will display the order with a **Return** against any line that can be returned

6. Select the Return key
7. Select the reason (take care to select the correct **Return to Stock** or **Do not return to stock** reason)
8. Select Proceed
9. Select Close
10. Refund by one of the following means – either:
 - a) Exchange item by scanning the barcode of the replacement item
 - b) Refund – Pay by Cash
 - c) Refund – Pay by Card
 - d) Refund – Issue Credit Note
11. Select Checkout
12. Select Issue Credit Note
13. Finish

How do I perform a Return

If NO receipt and NO identifiable sale

1. Tap **Menu**
2. Tap Returns
3. Scan the barcode of the returned item
4. Tap the Return key
5. Select the reason (take care to select the correct **Return to Stock** or **Do not return to stock** reason)
6. Tap Proceed
7. Tap Close
8. Refund by one of the following means – either:

a) Exchange item by scanning the barcode of the replacement item

b) Refund – Pay by Cash

c) Refund – Pay by Card

d) Refund – Issue Credit Note

9. Tap Checkout

10. Tap Issue Credit Note

11. Finish

How do I perform a Return

If NO receipt and NO identifiable sale and NO barcode

1. Select Home

2. Select Product Search

3. Select Unallocated

4. Enter Description of product and that it is a refund

5. Quantity = 1

6. Price = the amount of refund (NB: ensure you use a minus before the number)

7. Select Save

8. Refund by one of the following means – either:

a) Exchange item by scanning the barcode of the replacement item

b) Refund – Pay by Cash

c) Refund – Pay by Card

d) Select Checkout

9. Select checkout
10. Select Issue Credit Note
11. Finish

How do I give a Refund

If you have a receipt:

1. Scan the original receipt
2. Choose the item to be returned and Select Return
3. Select the reason (take care to select the correct **Return to Stock** or **Do not return to stock** reason)
4. Select Proceed
5. Close the receipt page
6. Refund by one of the following means – either:
 - a) Exchange item by scanning the barcode of the replacement item
 - b) Refund – Pay by Cash
 - c) Refund – Pay by Card
 - d) Refund – Issue Credit Note
7. Select Checkout
8. Select Issue Credit Note
9. Finish

How do I give a Refund

If NO receipt available:

1. Tap **Menu**
2. Select Sales
3. Find the original sale, if possible
4. Select the *Return *button
5. This will display the order with a against any line that can be returned
6. Select the Return key
7. Fill out a reason for return
8. Select Proceed
9. Select Close
10. Refund by one of the following means - either:
 - a) Exchange item by scanning the barcode of the replacement item
 - b) Refund – Pay by Cash
 - c) Refund – Pay by Card
 - d) Refund – Issue Credit Note
11. Select Checkout
12. Select Issue Credit Note
13. Finish

How do I give a Refund

If NO receipt and NO identifiable sale

1. Tap **Menu**
2. Tap Returns
3. Scan the barcode of the returned item
4. Tap the Return key
5. Select the reason (take care to select the correct **Return to Stock** or **Do not return to stock** reason)
6. Tap Proceed
7. Tap Close
8. Refund by one of the following means - either:
 - a) Exchange item by scanning the barcode of the replacement item
 - b) Refund – Pay by Cash
 - c) Refund – Pay by Card
 - d) Refund – Issue Credit Note
9. Tap Checkout
10. Tap Issue Credit Note
11. Finish

How do I give a Refund

If NO receipt and NO identifiable sale and NO barcode

1. Select Home
2. Select Product Search
3. Select Unallocated
4. Enter Description of product and that it is a refund
5. Quantity = 1
6. Price = the amount of refund (NB: ensure you use a minus before the number)
7. Select Save
8. Refund by one of the following means – either:
 - a) Exchange item by scanning the barcode of the replacement item
 - b) Refund – Pay by Cash
 - c) Refund – Pay by Card
 - d) Refund – Issue Credit Note
9. Select Checkout
10. Select Issue Credit Note
11. Finish

How do I print a shipping list for an online order?

1. When an online order comes into the POS – click on the notification
2. Tap "Print Item List"

How do I create a Manual Credit Note?

This process is used to create manual credit notes only. E.g. when the receipt cannot be found / when returning stock sold pre-Aptimyz / when the barcode cannot be scanned or replicated)

1. Tap **Menu** from the POS screen (bottom right button)
2. Tap Create Credit Note
3. Enter amount
4. Enter a Note to support the credit note – this will be displayed on the credit note.
5. Type a Reason Issued
6. Tap Customer if applicable
7. Tap Create Credit Note

How do I do a Manual Transaction (Charge or Refund)?

This is a seldom used process, please be aware that manual transactions will not be saved against sales or stock items in Aptimyz

1. Tap **Menu**
2. Tap Manual Transaction
3. A set of instructions will then print out on the receipt printer:
 - a) Enter an amount into the number pad
 - b) Add a "Note" if required
 - c) Tap on "Refund" or "Charge" button
 - d) If a refund, tap on "OK" to confirm
 - e) Tap method, Cash or Card
 - f) Tap "Done"
 - g) Tap **Back** button at bottom of screen

4. The system will then take you into the Clover Till system to perform the Manual refund or charge.

5. Aptimyz will request the amount you entered into Clover and create a record of the transaction in the Aptimyz database. This will appear on the Z-report as a Manual Transaction, but your stock levels and costs will not be affected.

How do I create a Gift Card?

1. Tap **Menu**
2. Tap **Buy Gift Card**,
3. Either:
 - a) Scan a gift card barcode code from pre-set vouchers in store
 - b) Choose an amount from the boxes at the bottom of the window
 - c) Key in an amount in the amount box.
4. Add any notes to go on the voucher.
5. **Create Gift Card.**
6. Complete Sale as normal.

How do I accept payment via a Credit Note?

1. In the POS, after the goods have all been added to the sale,
2. Tap **Checkout**.
3. Choose the tender type **Gift Card/Credit Note**
4. Scan the Credit Note barcode
5. The system will reduce the outstanding balance on the Credit Note by the amount required for the sale.
6. At the end of the sale the system will produce a new Credit Note with the reduced balance. NOTE: If the sale is more than the Credit Note, the system will require a further tender type to be used for the balance.

How do I accept payment via a Gift Card?

1. In the POS, after the goods have all been added to the sale,
2. Tap **Checkout**.
3. Choose the tender type **Gift Card/Credit Note**
4. Scan the Gift Card barcode from either the plastic gift card or the gift card printout.
5. The system will reduce the outstanding balance on the Gift Card by the amount required for the sale.
6. At the end of the sale the system will produce a new Gift Card with the reduced balance. NOTE: If the sale is more than the gift card, the system will require a further tender type to be used for the balance.

How do I perform a telephone / MOTO payment

In Clover Setup (or the Station Pro) go into Payments > Enable Manual Card Entry You may need to approach your Clover sales team to enable MOTO payments before accepting them locally

From a Station Pro

1. From Aptimyz POS
2. Scan the products into the Sale
3. Tap **Pay by Card**
4. That takes you to Clover's payment mechanism
5. One of the tender types is now **Mail/Phone Order**
6. Put in all the credit card details
7. Finish the transaction as normal.

On a standard Clover Station

1. From Aptimyz POS
2. Scan the products into the sale
3. Tap **Pay by Card**
4. You now MUST do the next stage on the small Clover Mini (This will NOT work on the till)
5. Unlock the Mini (if necessary)
6. Click on **Orders**
7. Click on the order you want to pay
8. Add payment
 - a) Click on Mail/Phone Order (on the bottom of the screen)
 - b) Continue and take the Card number, Security Code, Expiry, then Enter
 - c) It is now processing the payment.
 - d) Press **Done** on the mini
 - e) Then return to the main screen
 - f) Press **Done** again

- g) Aptimyz will then say "Waiting for Payment Confirmation from Clover"
- h) Press **Payment Received** (if it has been confirmed on the Clover mini payment system)
- i) It then checks again that you have been paid and you would click on "Card"

Where is my sale record (I can't see my sales record in Aptimyz – after I have taken the card payment)

This problem can occur if there is a disruption to the internet connection.
The flow of the order is as follows :

1. Enter products into Aptimyz > order stored in local temporary file only
 2. Send payment request to Clover > order still only stored temporarily in Aptimyz
 3. Payment taken in Clover
 4. Payment notification sent back to Aptimyz
 5. Aptimyz takes the stored temporary order and creates a permanent record.
 6. The data is then passed to the Till transactions and Sales reporting processes.
- Therefore, in the event of the above occurring and to ensure your Sales figures are correct, it is advisable to put the order on Aptimyz again and put the payment through as either a Bank Transfer or Online Sale (via the Checkout screen). These will go through to your till transaction report – so your money and sales figures will be correct.

Our machine won't read the chips of cards

This is a Clover issue – please contact the support desk at Clover

We can't take a credit card payment on the Clover card machine.

This is a Clover issue – please contact the support desk at Clover

No card receipts are printing from the Clover card machine

This is a Clover issue – please contact the support desk at Clover

Barcodes are not appearing on our Receipts

Please ensure you are using Aptimyz Receipts (these all have barcodes printed on them automatically)

Barcode not appearing on Gift Receipt.

When printing a gift receipt from Aptimyz, please ensure you are using the Checkout function and not the Quickpay Cash or Credit Card payment buttons.

Within Checkout you are given the option to print a VAT receipt or a Gift receipt – these both come with full scannable barcodes.

How do I check stock quantity from the POS?

1. From Home tap the **Product** button
2. Search for the product with either a barcode or the product name
3. Tap on the product name
4. A Product Variations Lookup will be displayed on the screen with corresponding stock quantity available.

How do I change the receipt details

This is a Back Office function – please go to the Setup Help pages

How do I transfer stock to another location in my business?

From a telephone call

1. Enter the order exactly like a normal sales order
2. When all products have been added tap **Checkout**
3. Tap **Stock Transfer**
4. Select the receiving location from the list on the screen
5. Finish. A picking list will print out from the POS printer.

From an automatic POS order

1. Tap Menu
2. Tap Stock Transfers
3. Tap Outgoing Stock. This will display a list of orders from other locations in your business.
4. Tap View on the order you wish to fulfil
5. Print a Picking list and send the goods off
6. In POS, Menu > Stock Transfers > View and delete all fulfilled orders

How do I add a Promotion?

1. Promotions are created in the Aptimyz Back Office
2. Once a promotion is created, the POS system will automatically add the promotion details to the screen and the receipt
3. If a product in a promotion is added, the item line will be highlighted in orange, when the promotion is fulfilled (e.g. a second item in the promotion is scanned) the item lines will turn green and the promotion offer will be calculated automatically.
4. Aptimyz will automatically offer the cheapest product as the discounted product

How do I change the value on a customer deposit balance?

- Normally you would use the Add to Account function, but occasionally the customer may need their balance adjusting instore
 1. From POS, tap Customer
 2. Search for the customer you want to edit
 3. Tap Edit
 4. Tap Amend on the button next to Account Balance
 5. Correct the error by typing in the new amount
 6. Type a reason
 7. Tap Save

Receipts have stopped printing

1. From Back Office, select Setup
2. Select POS
3. Check the answer on the following setting

Disable automatic printing of receipts in POS?

- NO in order to automatically print a receipt after every sale.

I don't want Receipts printing automatically

In very busy stores, it has been useful to turn off automatic receipt printing to save time and money

1. From Aptimyz Back Office, select Setup
2. Select POS
3. Check the answer on the following setting

Disable automatic printing of receipts in POS?

- YES in order to STOP the automatic printing of receipts after every sale.
- The till operators can, during a sale, choose to print a receipt if required.

How do I change the Parked Item expiry time?

1. From Back Office, select Setup
2. Select POS
3. Check the hours set on the following setting
4. **Expiry of Parked items (in hours)**

I have a blank screen

1. Turn off the POS terminal at the power
 2. Leave for at least 10 seconds
 3. Turn the power back on
- This is often the symptom of having a wireless connection to the internet. Aptimyz advise a wired connection to the router to counteract these types of issues occurring.

Not connecting to Clover

- This is often an internet connection issue.
 - Please ensure you are still connected to the internet
 - Rebooting a router may help with this issue
 - A wired connection to the router is always preferable to wireless connections.
1. Turn off the POS terminal at the power
 2. Leave for at least 10 seconds
 3. Turn the power back on

How do I re-print a Gift Card or Credit Note

1. If you are in the Checkout screen and cannot scan the barcode, press *Cancel* to return to the main screen of the order.
2. Tap **Menu**
3. Type in any of the characters you can read underneath the bar code (the system does not need all the characters – it will search on any part of the barcode)
4. Tap on **Re-Print** next to the correct barcode.
5. Your POS printer will re-print the Card/Voucher/Credit Note immediately
6. Press Cancel and you will return to the order

Barcodes not working

There are a number of possible reasons why your scanner cannot read a barcode.

1. The scanner has become unplugged – please disconnect and reconnect your scanner
2. The label is unreadable – please try reading a different label for the same product
3. The barcode for this product is incorrect – please try to read a different label.

If your scanner is working correctly, then you may have an incorrect barcode against your product

- a) Log into Aptimyz Back Office
- b) Select Inventory / Products
- c) Search for the product by inputting the SKU on the label

d) If the SKU cannot be found, then please search by Product Name

e) Select the product, go to the variants page and check the SKUs

f) Amend and save as required.

4. The barcode has been used for more than one variant – please either edit the incorrect barcode(s) or delete the product and reimport the inventory file after checking the SKUs are unique.

To Convert/Exchange a Gift Card to a Deposit Account

1. Using the POS system,
2. Select Customer Search,
3. Add a new customer or find the customer account you wish to add a deposit to.
4. Select Menu
5. Select Add to Account
6. Type in the value of the gift vouchers you will be exchanging
7. Select Checkout
8. Tap "Gift Card/Credit Note"
9. Scan in the gift card
10. Finish