



FAQs Setup

What is the best way to create my setup files?

1. Go to the [Getting Started](#) Help article on the Aptimyz Help page
2. Follow the directions on the that page
3. Click on the link to Onboarding
4. When onboarding is complete, carry on clicking the links to the next article, at the bottom of each page

How do I change Business Details / Store Address

1. Select Setup
2. Select Business or Store, depending on where the amendment is needed
3. Select Details

How do I add a Warehouse

1. Select Setup
2. Select Business
3. Select Configuration
4. Select "Add Warehouse"

How do I add another Store

1. Select Setup
2. Select Business
3. Select Configuration
4. Select "Add Store"

How do I set up my Taxes

1. Select Setup
2. Select Store
3. Select Tax Rates

I am not Tax registered, what do I do?

Even if you do not charge or pay tax, you must have at least one Tax rate and Tax group in the system.

1. Select Setup
2. Select Store
3. Select Tax Rates
4. Add a Tax Rate : No Tax Applied, with 0% tax rate.
5. Add a Tax Group 0, Z, containing tax rate "No Tax Applied"

How do I change my Receipts

1. Select Setup
2. Select Store
3. Select Receipt Templates

How do I create a new Barcode / QR code label

1. Select Setup
2. Select Store
3. Select Barcode Labels

How do I add Gift Card amounts

1. Select Setup
2. Select Store
3. Select Gift Card
4. Add Gift Card

How do I add a Loyalty Point system

1. Select Setup
2. Select Store
3. Select Loyalty Points

Where are the Inventory Settings

1. Select Setup
2. Select Inventory

What are Unallocated products

1. In the POS, if a product cannot be found via a scanned barcode label or a product search, an Unallocated product can be created.
2. After scanning a label, the POS operator fills in a short description of the product, the price and the Tax Rate.
3. The system will then create an "Unallocated" product. This can then be scanned again in a further sale and the system will "remember" the details from the first scan.
4. If the product has no label, the Till operator can add an Unallocated product via the Product page on the POS.
5. A back office user can, at a later date, create a "real" product by accessing the Unallocated product and amending the details, including adding a supplier, a brand, a product group and the cost price.
6. Unallocated is a useful feature that gives the store the opportunity to begin trading even before all the products have been added.
7. Please be aware, your Sales information will not be accurate as the Unallocated products do not have an associated cost, until they have been edited.

Where are the POS Settings

1. Select Setup
2. Select POS
3. Select Settings

How do I add Suppliers

1. On a web browser, log in to your Aptimyz account
2. Click Suppliers
3. Click Suppliers
4. Click Add Supplier

Only the Supplier Name is mandatory

How do I add Brands

1. On a web browser, log in to your Aptimyz account
2. Select Suppliers
3. Select Brands
4. Select Add Brand

How do I bulk add Customers

1. From Menu, select Customers
2. Add Customer
3. Import Customers from a .CSV

My Customer Import won't work

Sometimes, the file you have built may have imported extra fields or line. The best way to combat this is to do the following:

1. Download the import file again
2. Copy your old columns one by one into the new import file
3. Reimport the new file

How do I add a single Customer

1. From Menu, select Customers
2. Add Customer
3. Add a New Customer
4. Fill out the mandatory fields below, then Save
 - Name
 - Surname
 - Phone
 - Email

How do I add another email account to the Z report

1. On a web browser, log in to Aptimyz back office.
2. Select Setup
3. At Store level: Select POS Settings
4. Add email address into the top option

How do I add/change a Quick Button

1. On a web browser, log in to Aptimyz back office.
2. Select Setup
3. At Store level: Select POS
4. Select Quick Buttons

How do I add/amend my Return Reasons

1. On a web browser, log in to Aptimyz back office.
2. At Business or Store level : select Setup
3. Select POS
4. Select Return Reasons
5. Add or amend Return Reason 6 Ensure there are at least 2 Return Reasons
 - a) A "Return to Stock" reason (Exchange / Unwanted / Did not suit / etc)
 - b) A "Do Not Return to Stock" reason (Faulty / Unusable / Out of Date / etc)