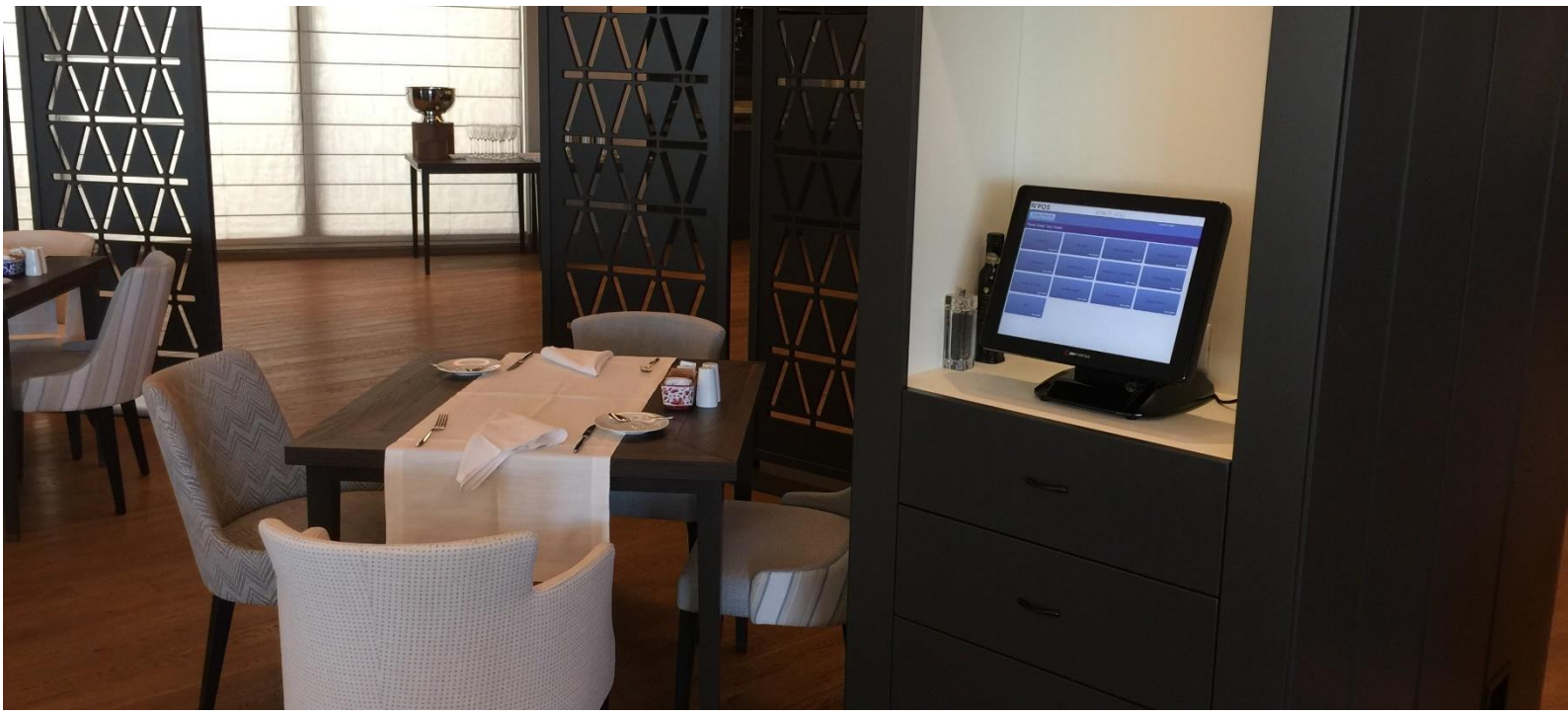
myPOS



Manual
for Cash Point Administration

Version 5.8

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MY POS is a Cashpoint System for resorts, hotels, outlets, shops, bars, clubs or quick service restaurants.

There are two versions of MY POS Cashpoints:

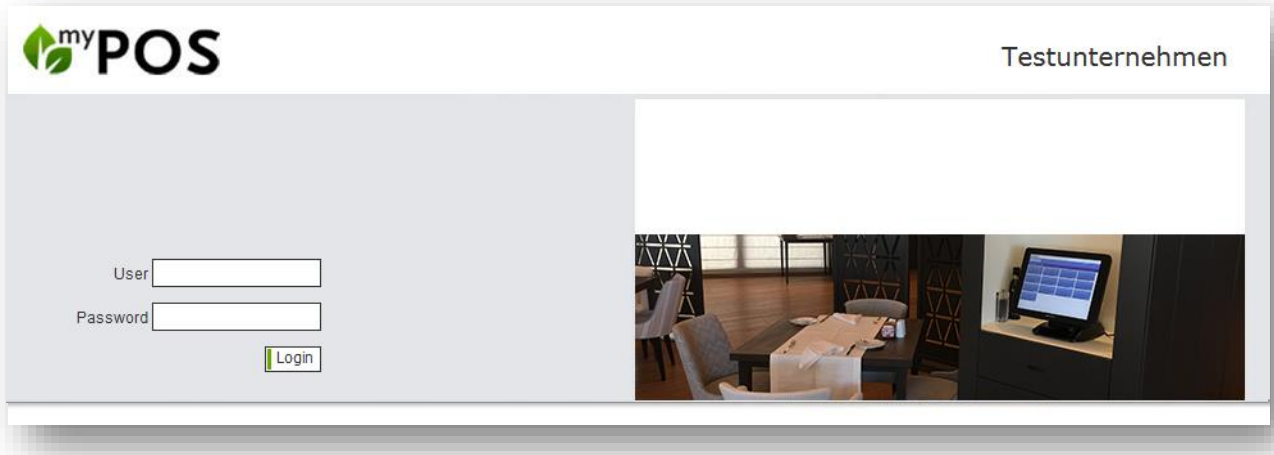
1. MY POS Express Cashpoint
   Quick booking and checkout of items in shops, bars, coffee shops or kiosks.
2. MY POS Restaurant Cashpoint
   For handling international restaurants with table management and multiple courses.

At a point-of-sale, it is easy to switch between the functions of express and transaction checkout.

1. Start and Login

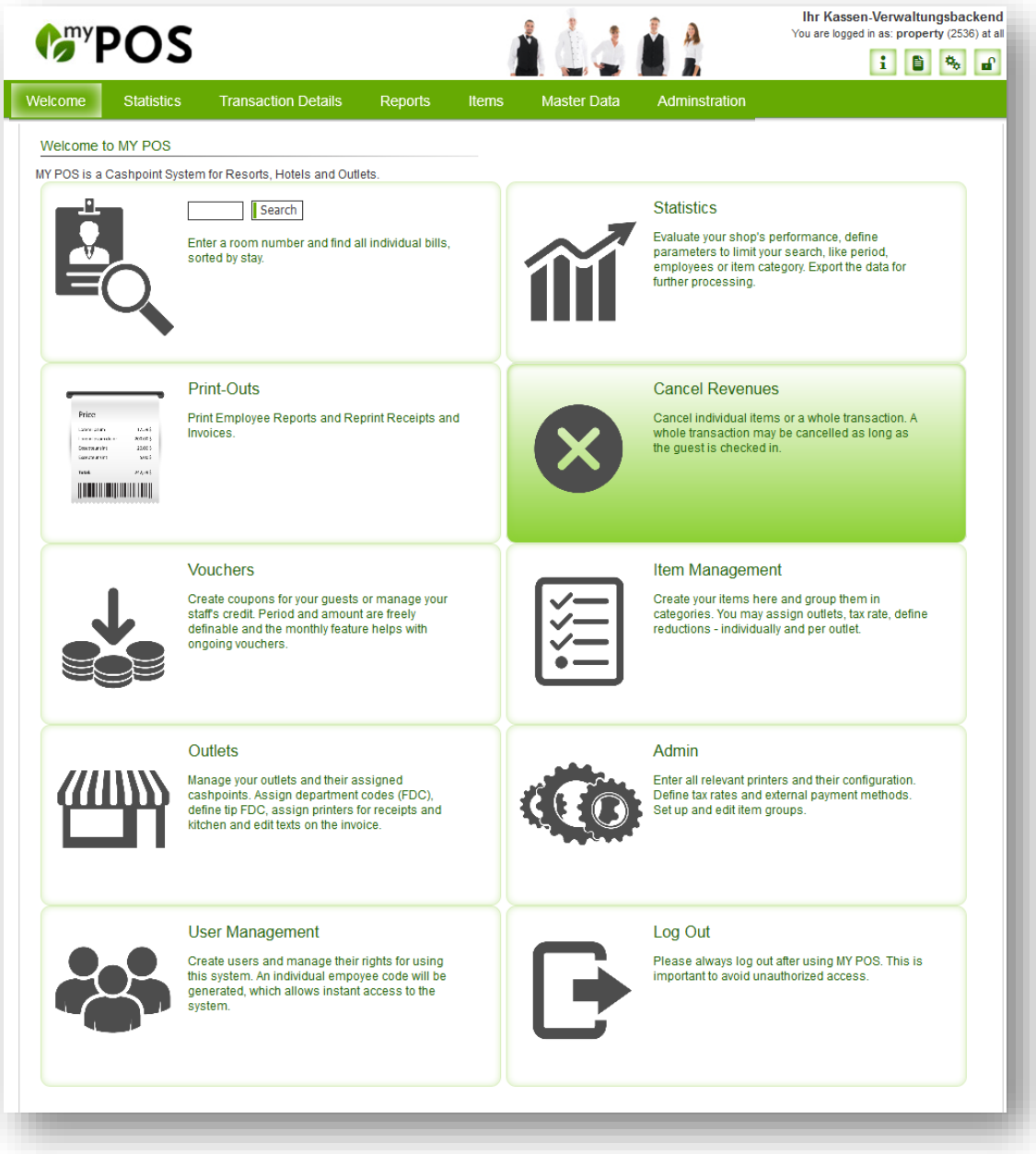
Open your web browser – for instance Internet Explorer or Mozilla Firefox – and enter the server address 'XXX.XXX.X.XX/MY POS' where your MY POS system is hosted.

Please enter your user name and password and click on the 'Login' button.



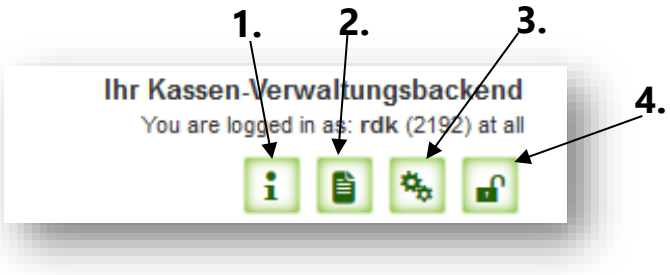
1.1. Overview

On the 'Welcome' page of MY POS you will find an overview of the features - with more or less points depending on access authorisation. The list corresponds to the top menu bar with explanations that will help you get started. Once you are familiar with the use of the features, you will probably choose to access them via the upper menu bar, which will lead you to the same functions.

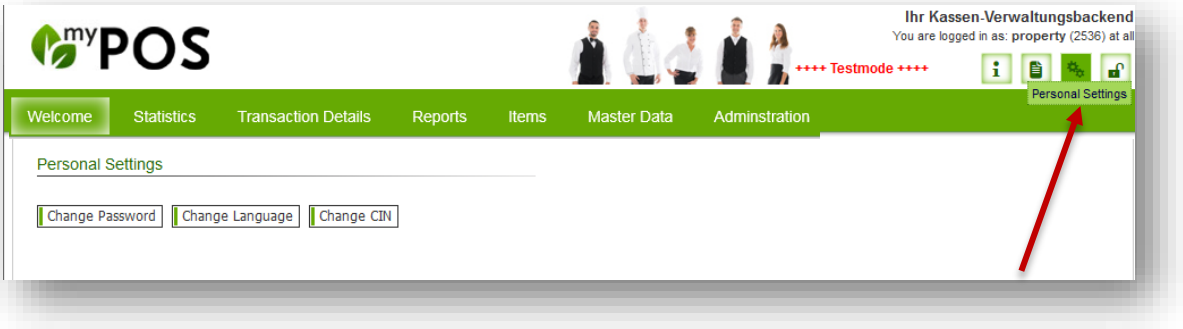


In the upper right corner, you will find a tool bar:

1. Help: MY POS Manuals for Service Employees, Administration and Quick User Guides
2. Open an additional MY POS window
3. Change your personal settings
4. MY POS logout



You may also check your login information: the MY POS license owner's company, user login initials, your access authorization (e.g. 'All Outlets') and your Service Code (e.g. 2192).
Change your password, language or your Cancellation Code (CIN) in 'Personal Settings'.

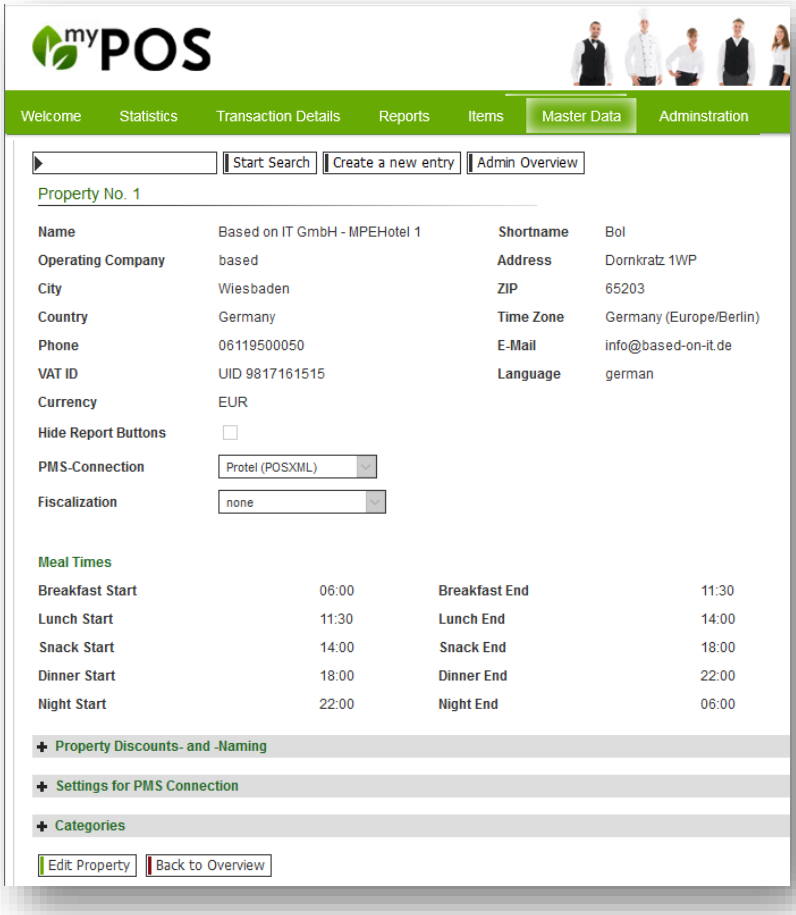


2. Master Data and Administration

You make central settings via the 'Master data' tab in the main menu. In the menu item 'Administration' you will find further general settings.

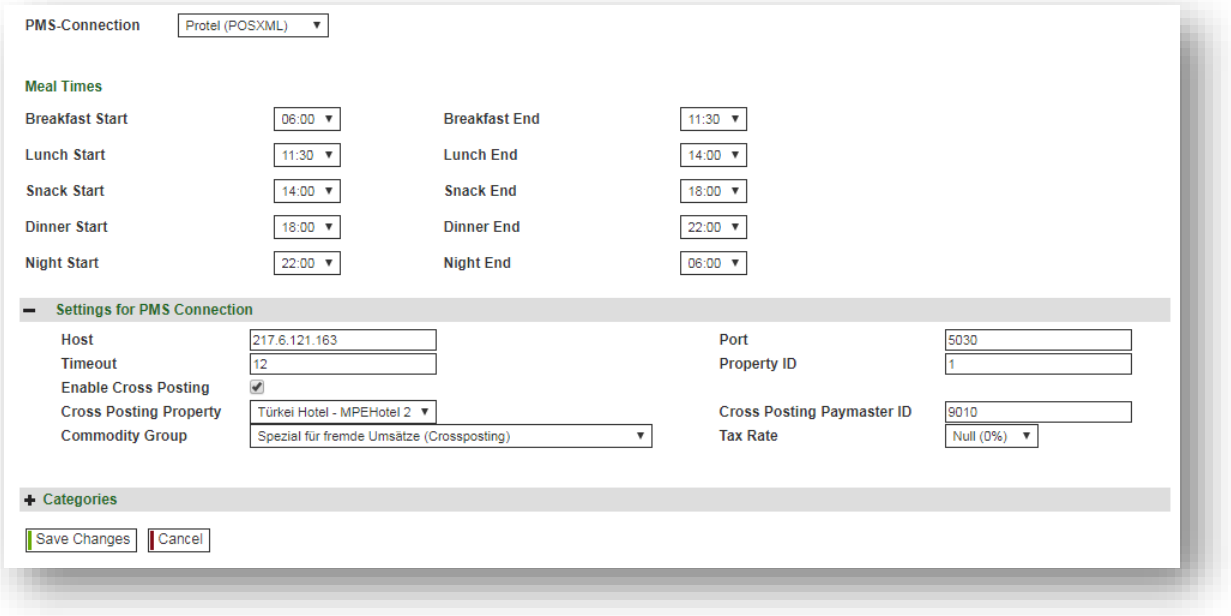
2.1. Manage Properties

Go to "Edit Properties" and you get to an overview of your existing properties, which you can edit or delete (provided that there are no more outlets, printers or employees assigned to this outlet). Clicking on "Create new entry" brings you to the following input mask:



First, you enter a property name and short name, which is used in the cash points, as well as in the backend for affiliation of outlets. There is a number of other information you can enter here, like the operating company, full address and VAT ID (displayed on the receipts), phone number and e-mail address, as well as a time zone and currency. If you check the box next to the feature 'Hide Report Buttons', the buttons for X- and Z-reports will no longer be visible in the cash point and the reports can only be printed through the MYPOS Backend. Please note: Because of the legal necessity of printing daily cash point reports, it is important that you inform us before enabling this feature of hiding the report buttons, so we can set up the automatic generation of the Z-report for you on the server (Cronjob).

In the settings of the PMS connection, you may define the individual connection per property. Define or choose 'none'. After choosing a connection with data exchange, additional settings will appear, which will be filled automatically after you click 'Save Changes'.



Depending on the PMS, there will be different setting options when editing or creating an outlet.

- Suite 8: Tax Rates
- Protel: Hotel Number
- Opera: Commodity Groups

In case you are using Protel, settings for the feature Cross Posting will appear. If you want to enable it and if yes, choose the property this regards and more. A more detailed description of this feature follows under Item 2.2.

In the next step, you can define the different meal periods of the day (in 30 minute steps). These times are used for splitting your sales in the “Meal Times” report.

Lastly, you have the opportunity to edit the sorting and naming of the item categories for all your property’s cash points. Click on ‘Categories’ and you will see a list of this property’s main- and subcategories of sold items. Simply click and drag a whole category or a sub-category (within their main category) with your mouse to the desired position.

The category ‘Zusatzinformationen’ is a special case, because it only contains additional item information, such as toppings or meat doneness, and therefore cannot be moved from its position.

Save your entries by clicking on “Create New Property”.

Hints for European fiscalization interfaces can be found in the manual 'MY POS Fiscalization'.

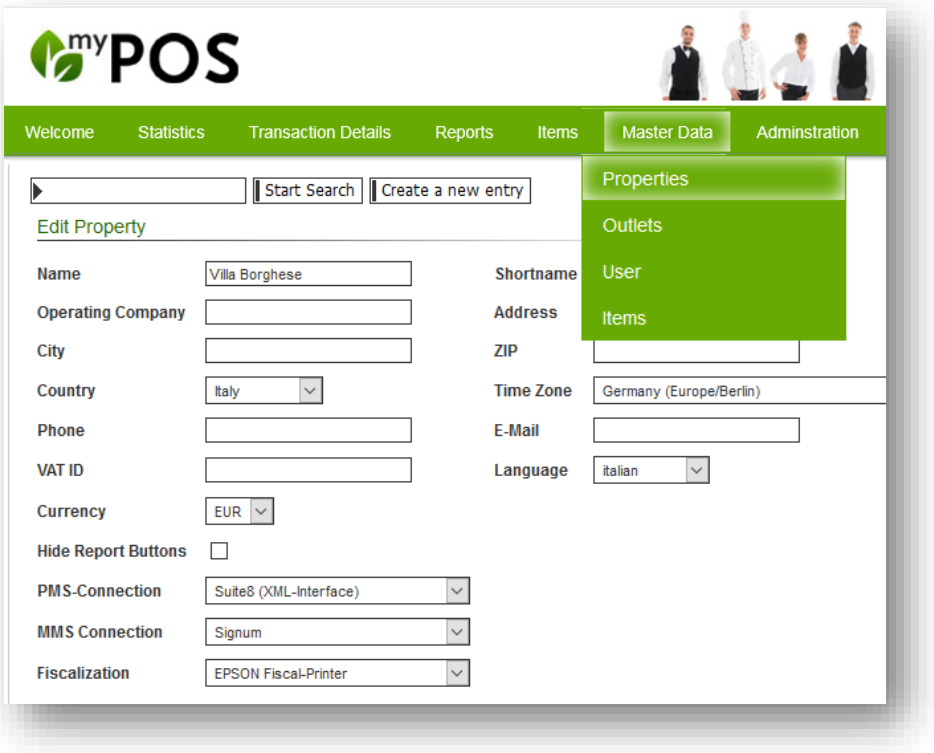
2.2. Connection of a Merchandise Management System

The maintenance of the articles by an external system is implemented in this version. Depending on the possibilities of the MMS and the architecture on site, the data exchange is handled via an interface, a file exchange or the connection to the MMS database.

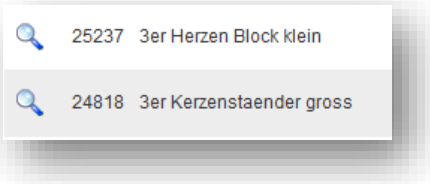
The MMS data is considered the leading system, the modification of the MMS article data in MY POS is prevented. Nevertheless, additional articles can be created in MY POS and maintained as usual.

Article data, prices and stocks are imported from the MMS, and sales, including discounts and cancellations as well as changes in stock are reported back.

The settings for the connection can be found in the MY POS administration under Master Data - Properties. Select the appropriate connection and fill in the settings for your merchandise management system that have been adapted according to your selection:

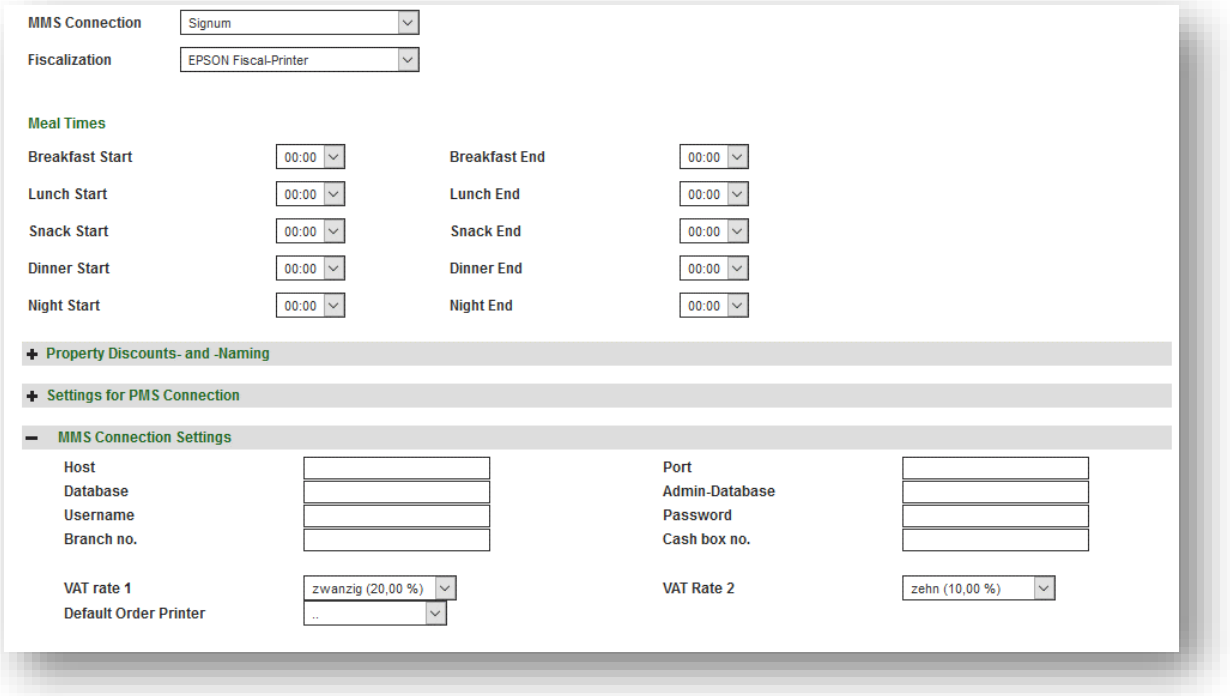


Articles are shown in the article list with a blue magnifying glass as an indication that they come from an external merchandise management system. When calling up the article details, processing is not possible.



2.2.1. Signum

The interface to the MMS Signum is defined via the direct connection to the database. The entries for this are listed under Master Data - Properties - MMS Connection Settings:



If you are interested in connecting other merchandise management systems, please contact us.

2.3. Integrated MY POS ERP System

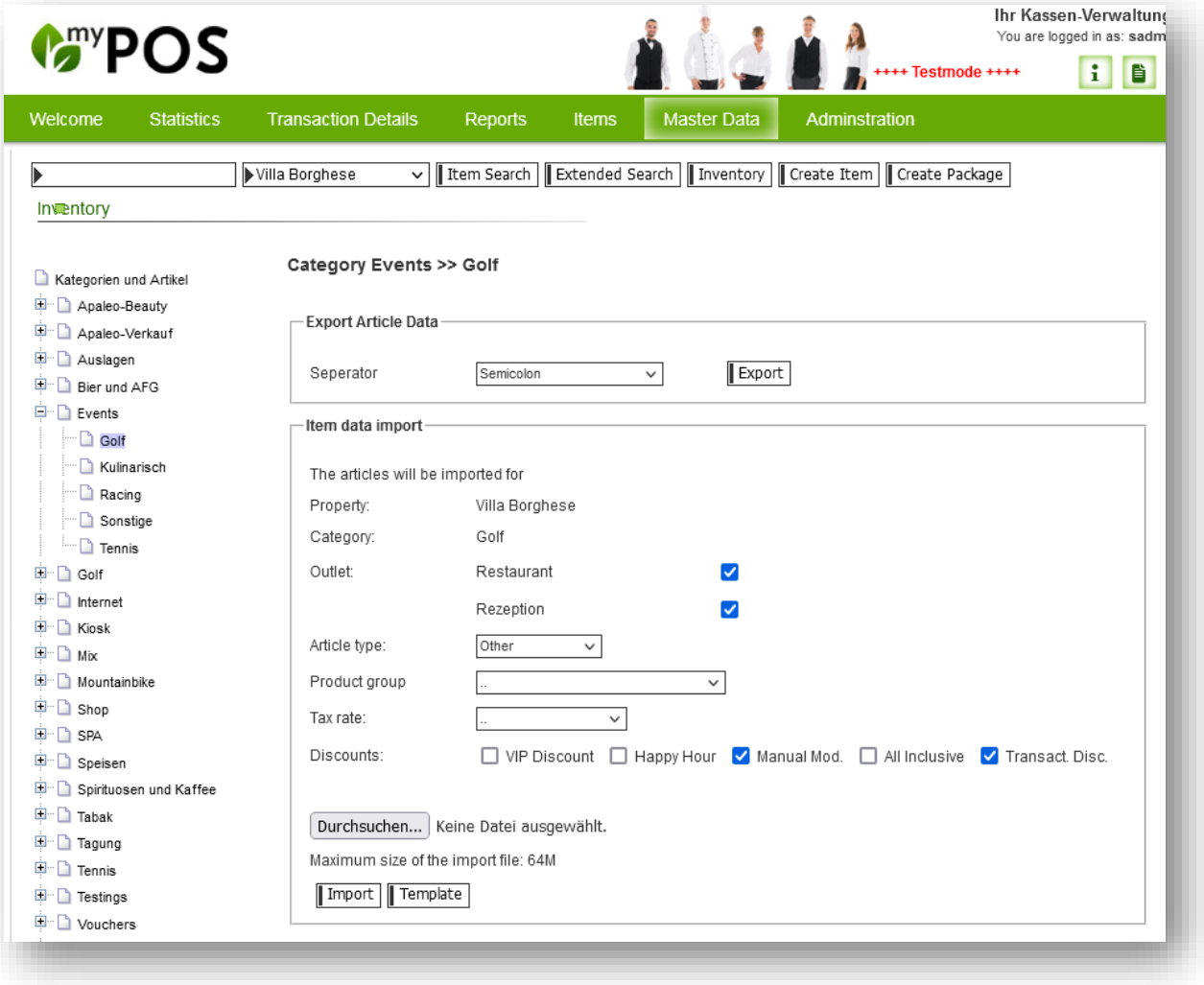
MY POS offers integrated inventory management. The current stock is counted and can be imported and exported.

2.3.1. Article Stock Managment

The MY POS internal merchandise management system must be selected in the properties' master data. When you click on an item in a sub-category, you can view and edit the stock in an overview.

2.3.2. Article Im- and Export

Select a top and sub-category in the menu item Master Data – Items - Inventory.



You can import a .CSV file. These are all created with the characteristics entered here:
Select the item type (food, drinks, wellness, other), the product group and the tax rate, as well as discounts.

As the import expects the articles in a specific format and column sequence, please first download an empty file with a sample data record by clicking on the "Template" button. The fields are to be filled as follows:

The ERP no. is your external WWS number, the Description, Colour and Size fields are combined to form the MY POS checkout and receipt item description, the barcode is used to scan the item when booking in the checkout, the Quantity field describes the current stock level and the last field contains

the sales price. Please enter the price here with a separator (220.20, not 220,20):

	A	B	C	D	E	F	G
1	ERP Nr.	Description	Colour	SIZE	BARCODE	QTY	GROSS PRICE
2	2023/02-WH	T-Shirt	Blue	42	123456789	1	220.40
3							
4							

Once you have filled the template with your data, you can import it. Please note that the edited file must be saved and imported in CSV format and that this must be done separately for each subcategory.

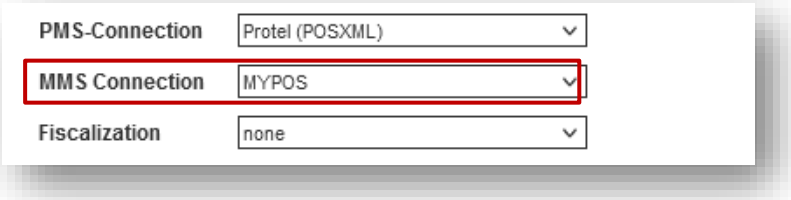
2.3.3. Importing and Exporting Stocktaking Lists

If there are already items in this point of sale, you are offered the option of importing and exporting inventory lists. Export your inventory list, edit it and upload it again. Please note that the file must remain in CSV format.

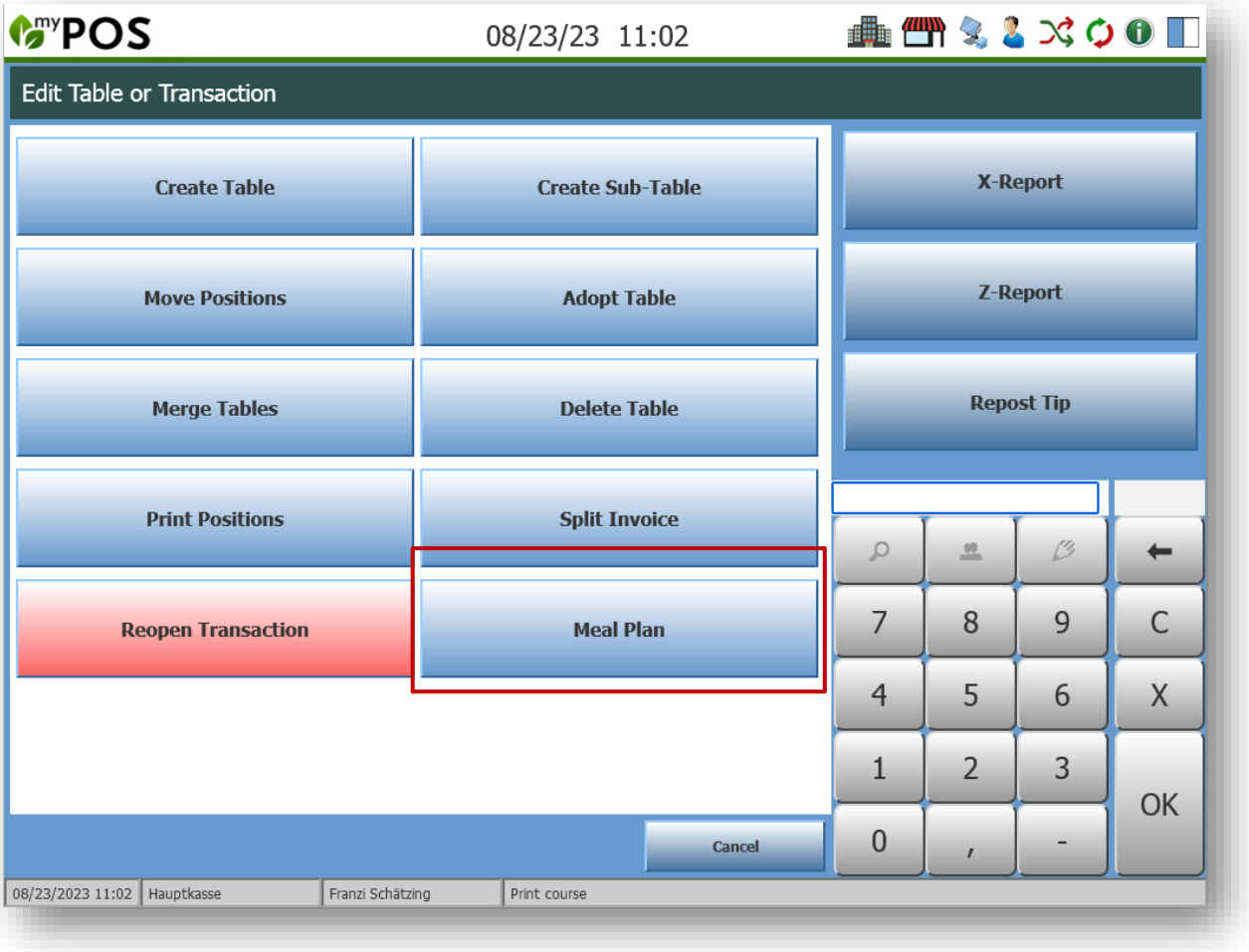
2.4. Menu plan

In order to save enquiries in the kitchen, the kitchen can use the menu plan function to specify how many portions of a dish are available today. The chef enters the number daily and determines whether this information is binding or can be overbooked if necessary. This information is displayed to the service staff in the item overview.

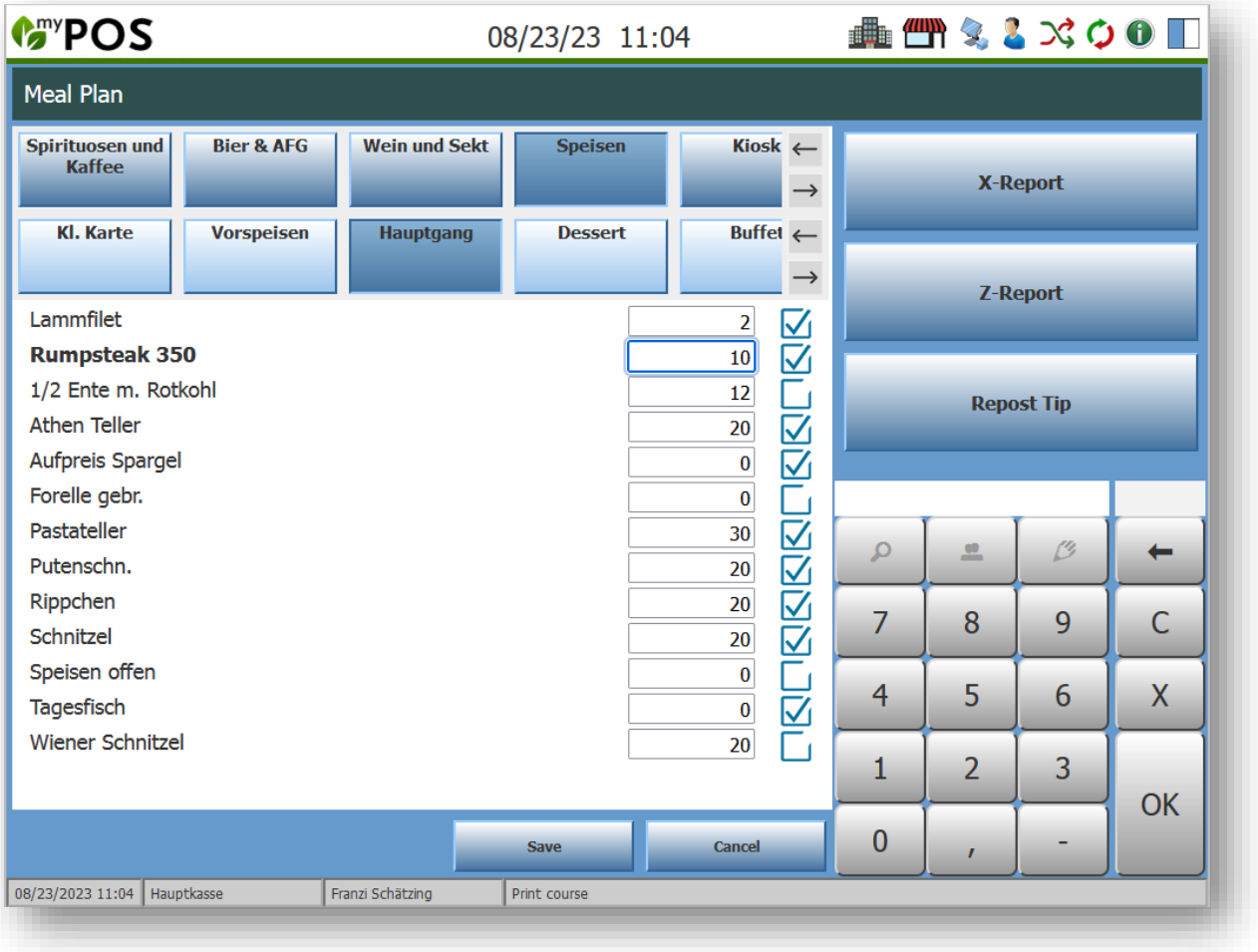
First set up the MY POS internal merchandise management system in MY POS Administration under Master Data - Properties:



You will then find a new button "Menu plan" in the table and transaction functions of the Cashpoint Touchscreen:



Within the plan, select the dishes for which you want to save availabilities within the categories:

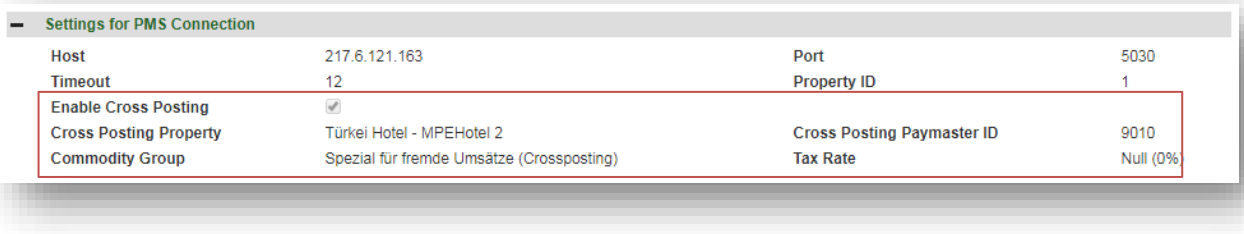


The tick behind the dish determines whether overbooking is allowed. If it is set, the set number can be overbooked.

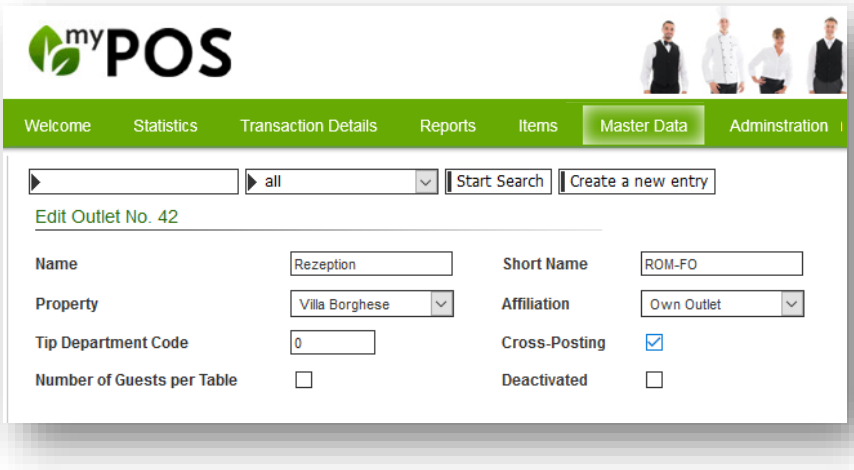
2.5. Cross Posting

The feature Cross Posting allows in the Multi-Property version to post a bill on a guest's hotel account, staying in another hotel.

In the first step, the transaction is sent to a transfer account of the performing hotel, to which the outlet is assigned, and in a second step the total sum without VAT is sent to the guest's hotel account of the hotel, where the guest resides. This allows the correct balancing between the two hotels – one received the payment, the other performed the service. To enable the feature, check the Cross Posting function in the MY POS backend settings of the property – in the PMS Setting Section. Enter the transfer account (Cross Posting Paymaster ID) and the other hotel (Cross Posting Property). You also need to enter the Commodity Group and Tax Rate for all bookings of external guests.

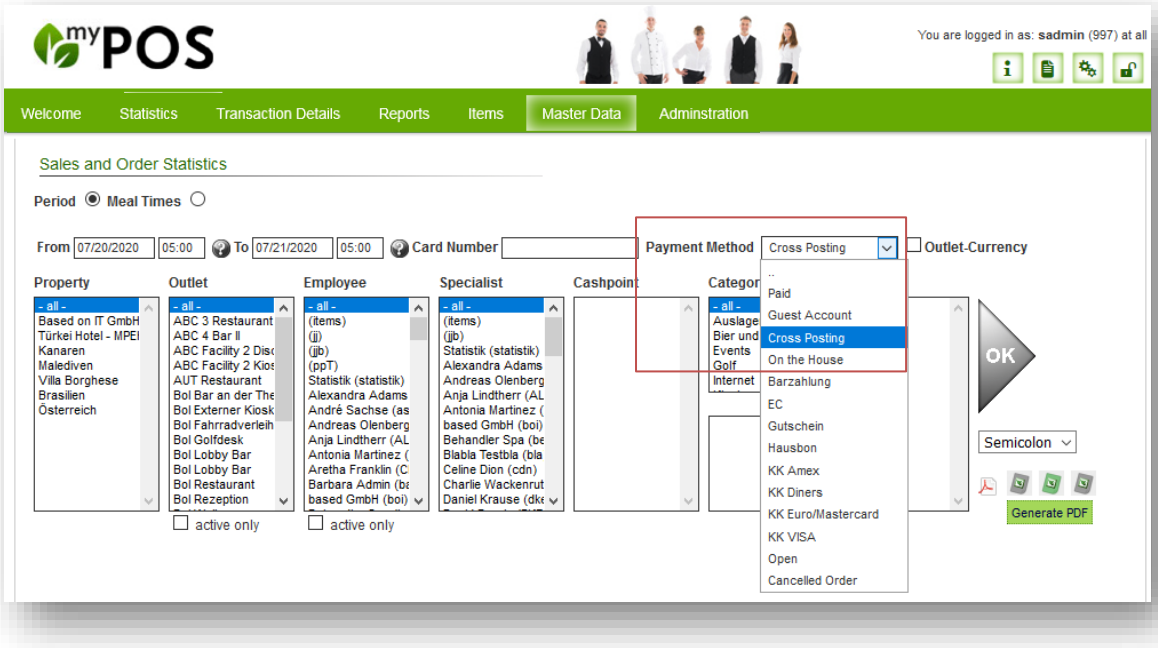


A second approval must be configured in the outlet's settings.



In the cashpoint, the waitress/ waiter simply enters the guest's room number or room card as usual. The posting will only be possible, if the guest is checked in and the transfer account is available. If one does not apply, the transaction will stay open and an error message is shown.

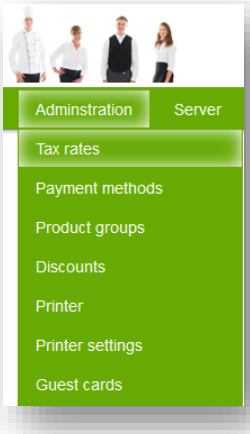
You may find all cross posting transaction in the statistics by choosing the Payment Method ‚Cross Posting'.

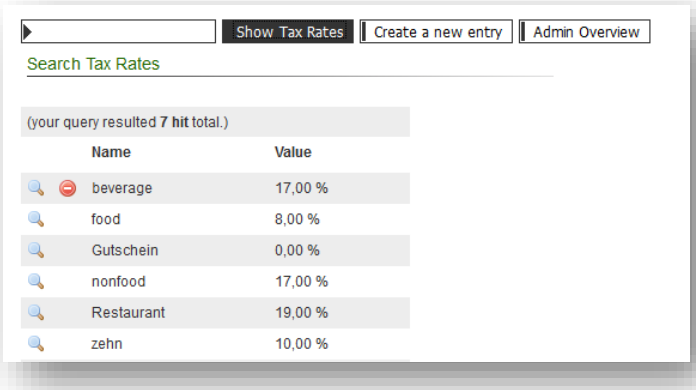


Please note: a cross posting to a guest's hotel account staying in another hotel can only be done by paying the total sum. The combination of posting on guest account and other payment types like voucher is not possible and will lead to an error message.

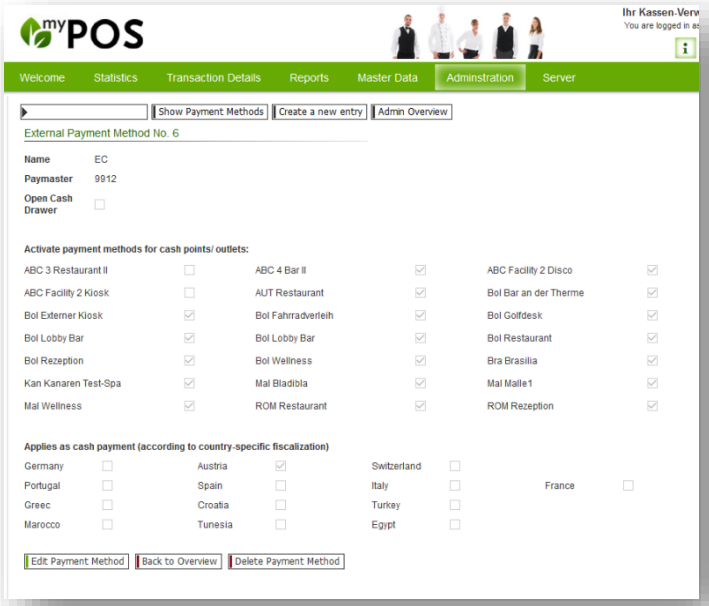
2.6. Defining Tax Rates

Check existing tax rates by clicking on the magnifying glass, create new tax rates by clicking on 'Create a new entry' and entering a name and the percentage of tax to be charged.





2.7. Payment Methods



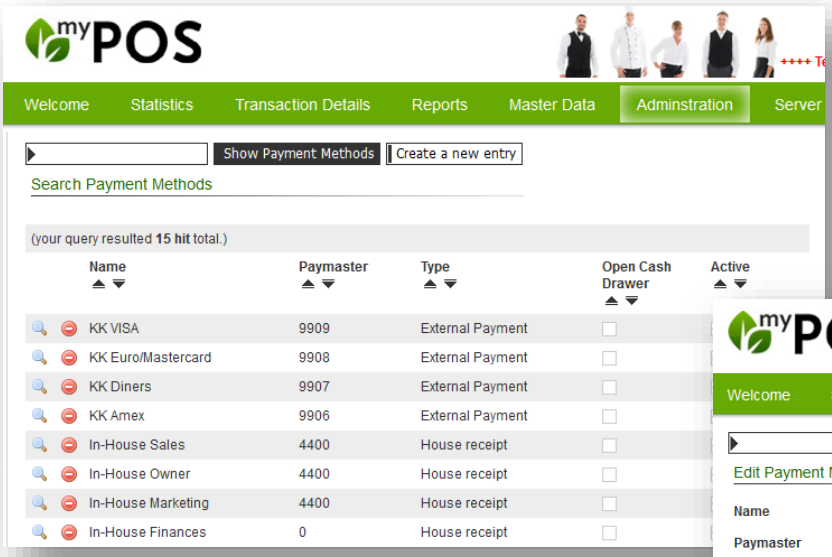
Would you like to see all available payment methods? Please click on "Edit external payment methods". You create payment methods by clicking on "Create new entry" and enter the Paymaster and the name of the payment method. Please confirm your entries by clicking on "Create new payment method". By ticking off the checkbox, you can determine in which sales outlets the payment methods should be accepted.

Since the name of the payment method can be freely assigned, it must still be determined whether the selected payment method is to be considered as a cash payment.

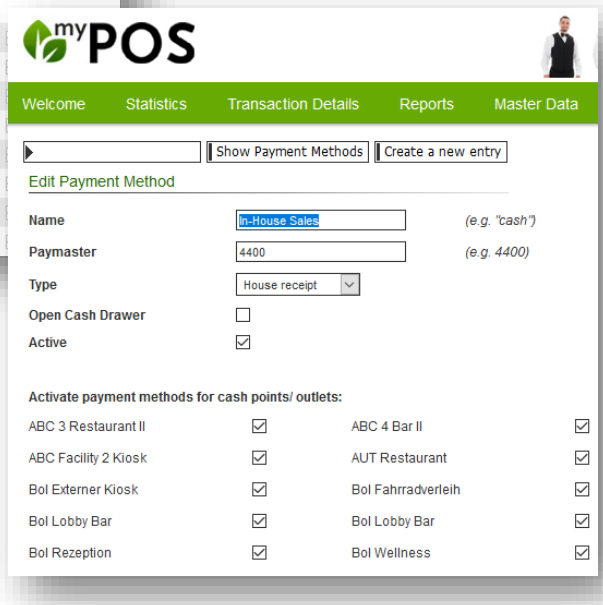
2.7.1. In-House Invitation Paymethods

You can now define different in-house receipt categories and thus select e.g. the inviting department already during the billing process.

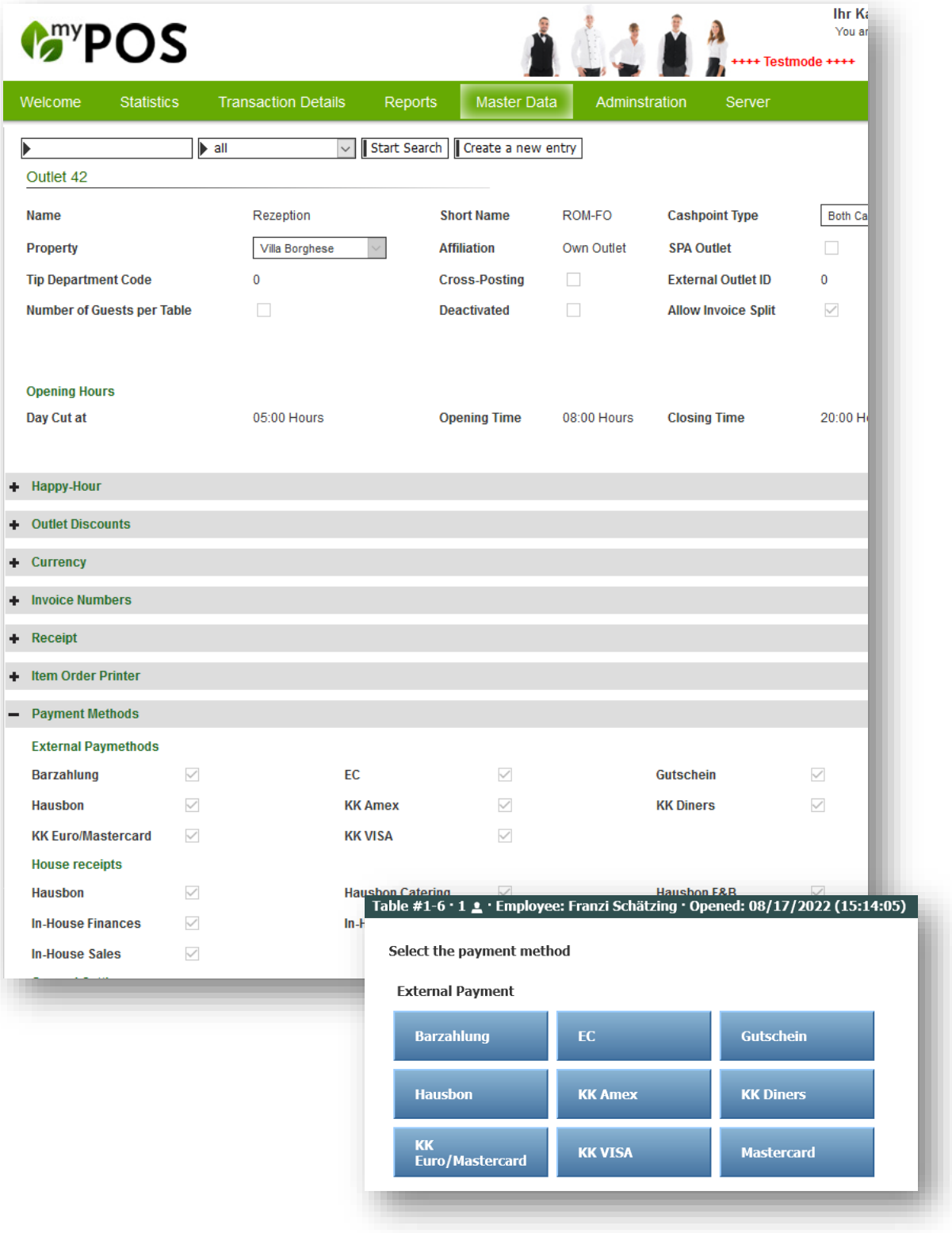
First open the MY POS Administration and the menu item Payment methods:



Click on 'New entry' to create the new in-house receipt category, which you can already assign to the points of sale in which it may be used.



The assignment can also be done alternately in the configuration of the outlets.

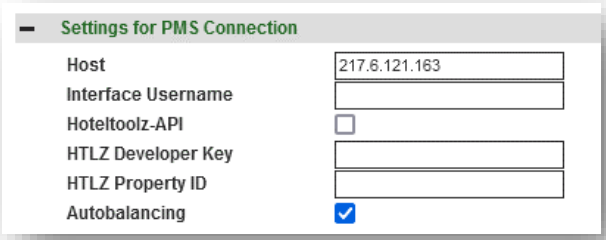


These in-house payment methods are offered in the cash register interface for billing.

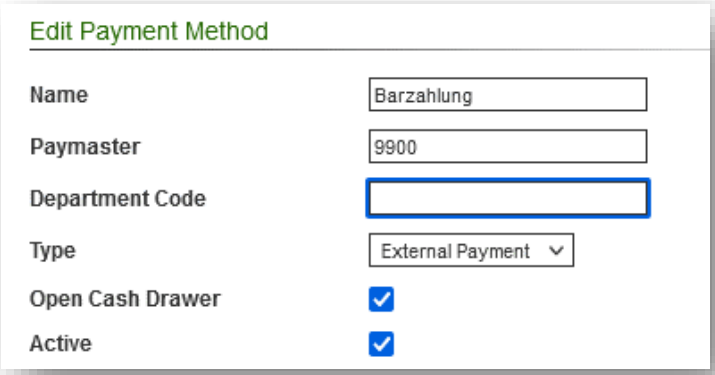
2.7.2. Auto-Balancing

Optionally, you can enter a Department Code for some payment types in addition to the Paymaster account, to which the turnover is sent for balancing. Manual balancing of the accounts in this case is no longer necessary.

First, please set the checkmark for 'Autobalancing' in Master Data - Property - Settings for the PMS connection.

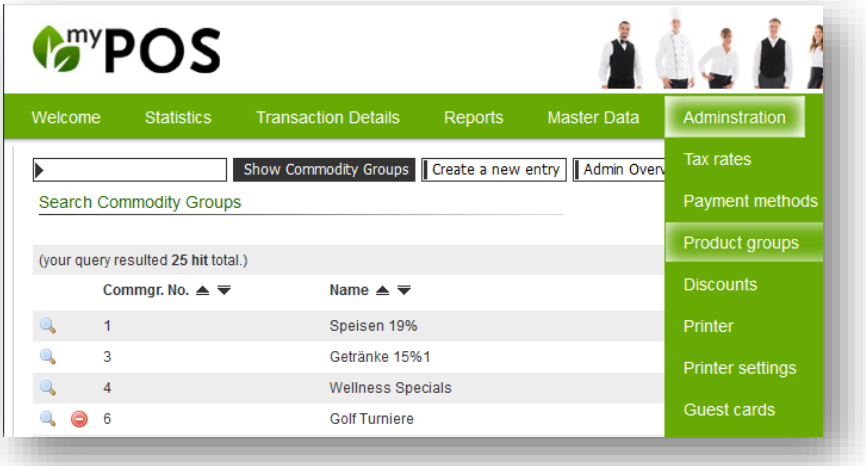


You will then find the field for the Department Code to which the Balancing Turnover is to be sent under Administration - Payment Methods when clicking on the magnifying glass.



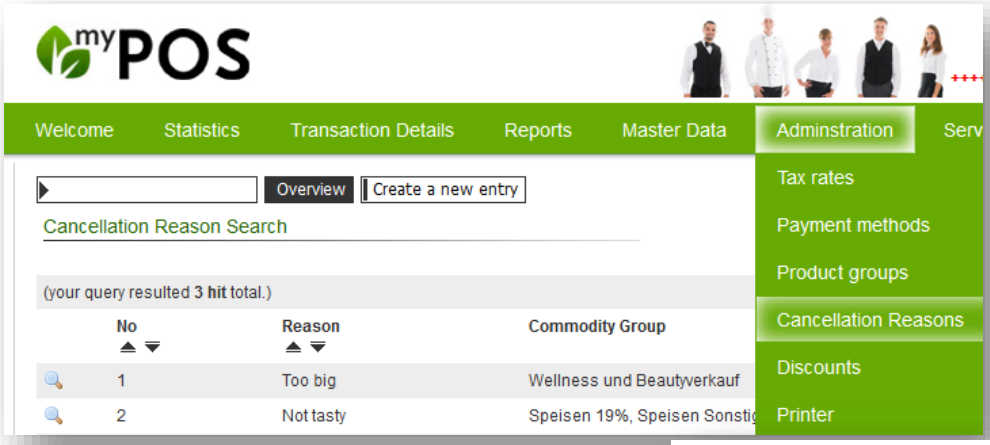
2.8. Product Groups

Display existing product groups by clicking on "Edit product groups". To create a new product group, click on "Create new entry" and enter the name of the new product group. To save, click on "Create new product group".

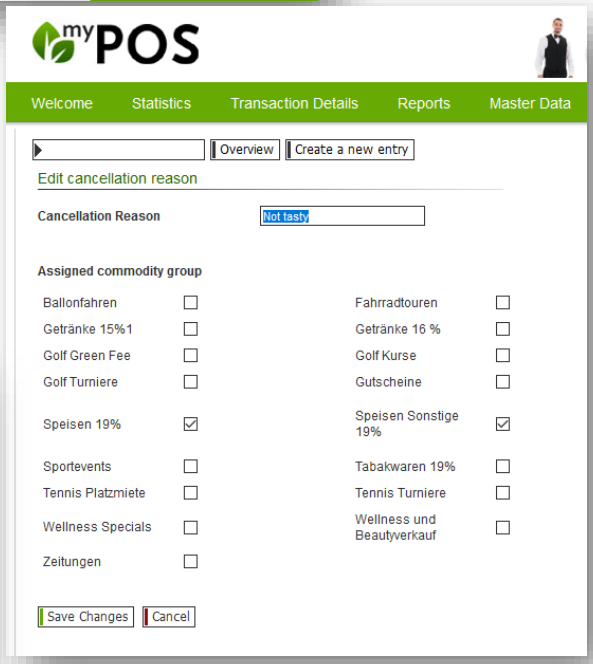


2.9. Setup Cancellation Reasons

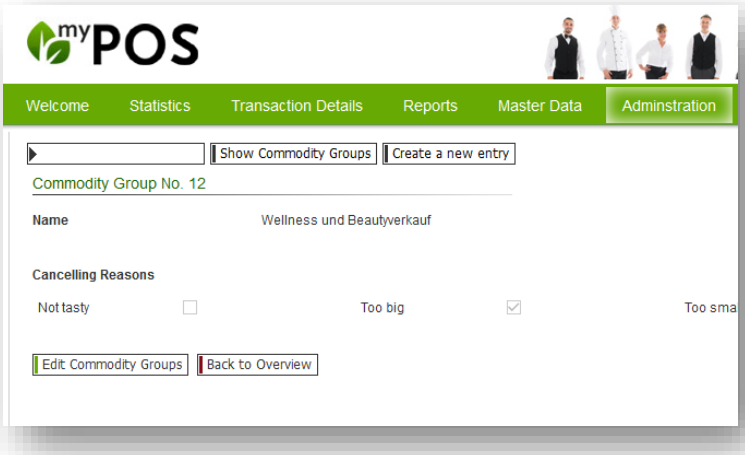
If you would like to define the input of a reason as a mandatory entry for certain product groups in your MY POS system in the event of a cancellation, please define standards in the menu item Administration - Cancellation Reasons which are to be offered to the service staff for selection:



When entering a new cancellation reason, you will see your product groups and can assign your new entry by checking it.

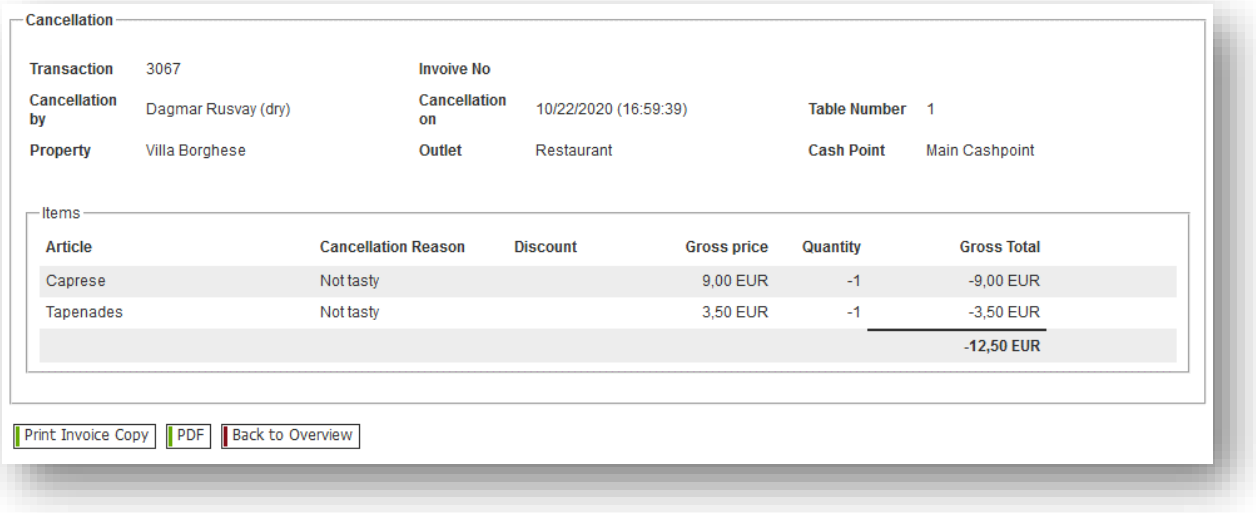


You can also assign cancellation reasons in reverse for the product groups:



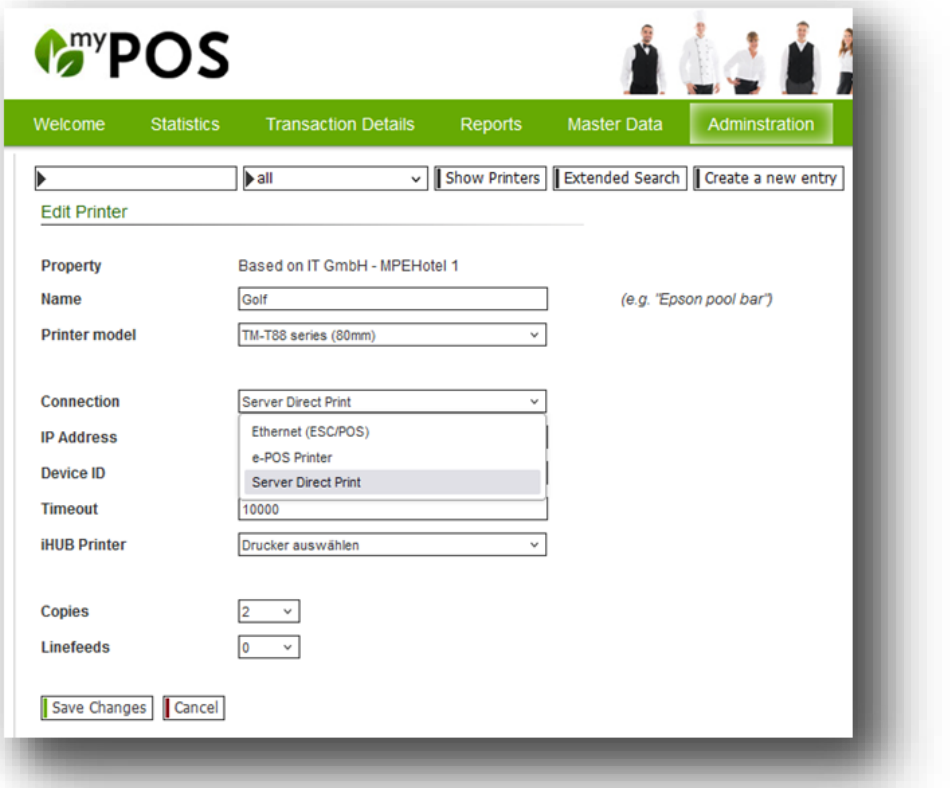
In the MY POS cash point, the stored reasons for cancellation are offered when an article is cancelled, provided the cancelled article belongs to the product group.

The reasons for cancellation are shown in the detailed view of the transaction:



2.10. Managing Printers

See, edit and create new printers by entering paths and other characteristics.



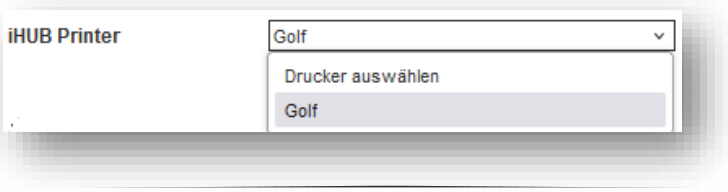
Depending on your connection, the path must be set:

- Ethernet: IP Adress
- E-POS: IP Adress
- Server Direct Print Path: Enter the URL of your installation and the server direct print address, e.g.http[s]://my-planer.de/mypos/sdp_get_printfile.php?printer=14

MY POS uses Server Direct Print technology to connect a cloud installation with local receipt and order printers. For example, the EPSON Tm-M30, Tm-M50 and Tm-T88 printers offer this functionality. Here the printer asks the server every second whether there are printouts to be processed.
You can also connect printers from older model series that do not have this server direct print technology (e.g. EPSON TM-U220 kitchen dot matrix printers) if there is an EPSON iHUB printer within the local company that collects the print jobs from the server and distributes them to the other printers connected to it in the network.

The number entered under ‚Copies' refers to the total number of print-outs of receipts, orders or reports when using this printer.

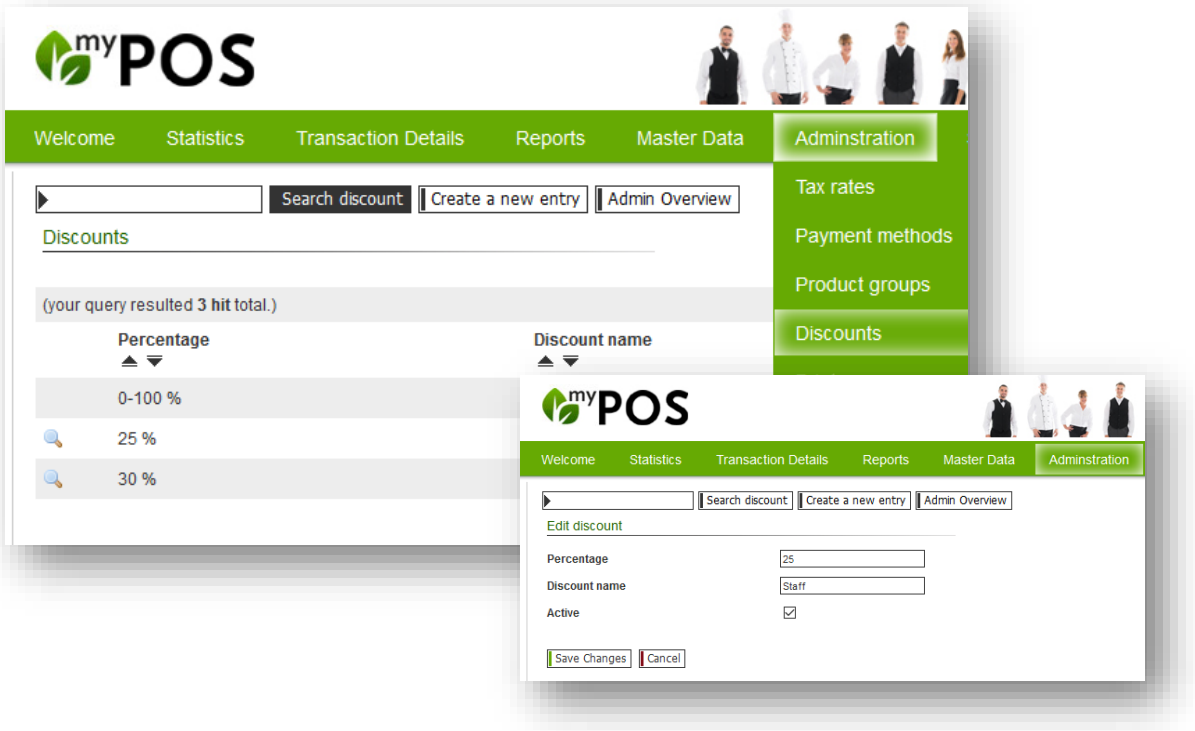
If an iHUB printer was previously defined, another printer in the company can refer to it:



2.11. Discount Settings

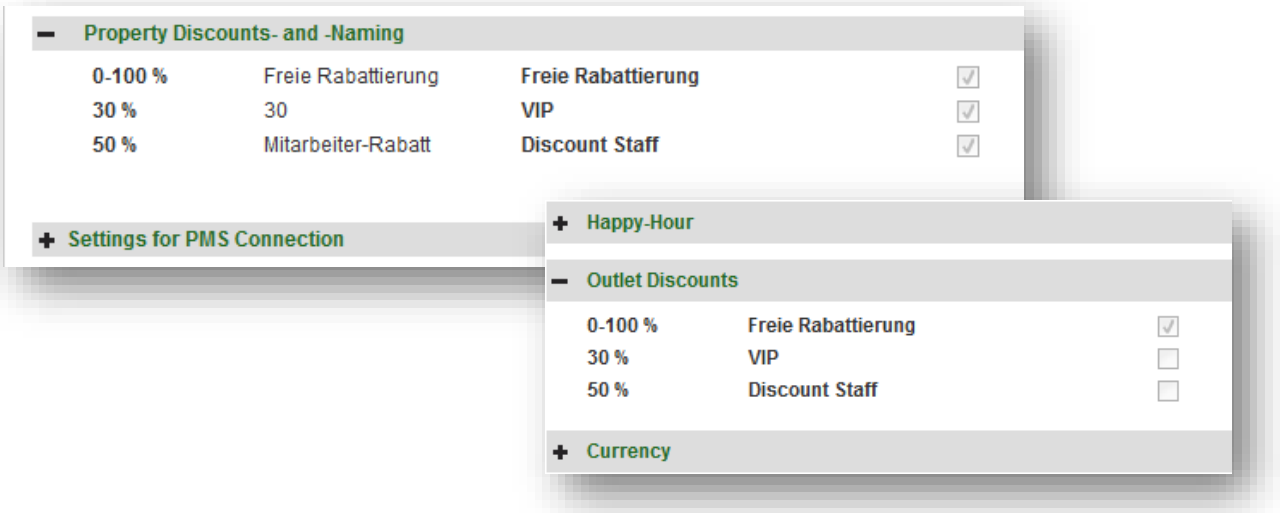
In 'Administration', fixed discount rates can be set up, which replace or supplement the free percentage reduction of a transaction. These fixed rates are used for the employee reports.

First of all, please create discount rates under the menu item Administration – Discount Settings and assign a group-wide name - if necessary, only enter the amount again.



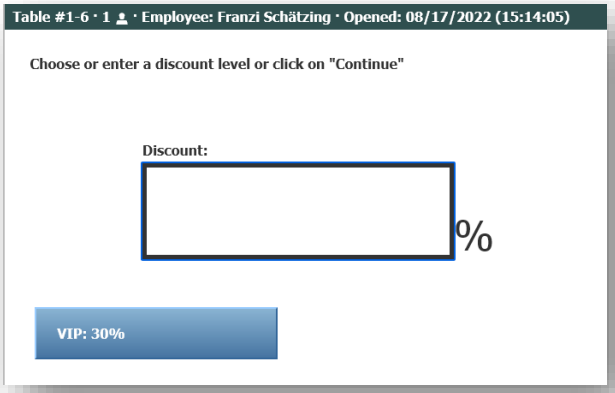
Setup Discounts for Properties and Outlets

In the settings of the property please select from these possible standard discounts those which are to be used in your hotel and if necessary enter the deviating name that the discount should carry in the cash points and on the bills.



Finally, you can still select or deselect those discounts for single outlets.

Please note that changing the discount amount requires full administrative rights.

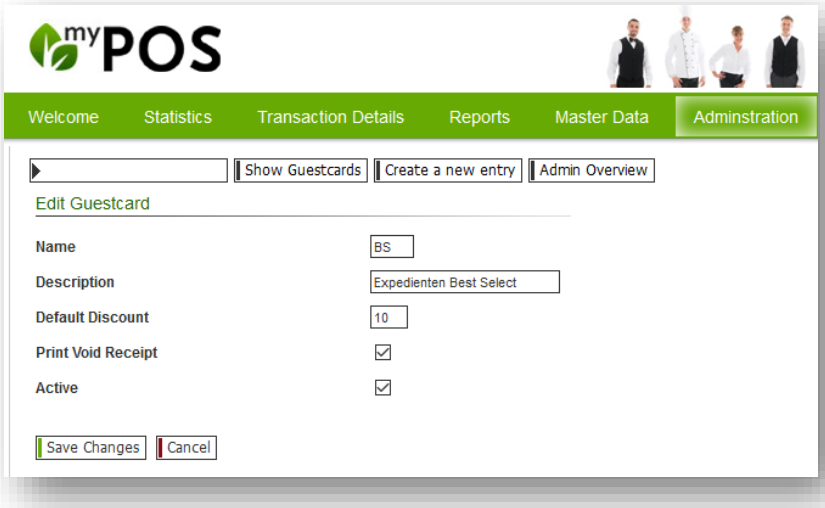


Grant Discounts at the Cash Point

At checkout, after the new and potential discounts have been properly setup, new options for transaction discounts will be offered, which will be applied to reducible items.

2.12. Managing Guest Cards

You can create new VIP guest cards or edit existing guest cards. To do so, click on "Edit guest cards", the existing guest cards will be displayed. You can edit the guest cards by clicking on the magnifying glass to the left of the corresponding entry. Click on the trash can to delete the entry.



Click on "Create new entry" if you want to create a new discount level. Enter an abbreviation of up to 5 characters in the "Name" field (e.g. BS for "Guest card platinum"). Give a short description (e.g. "Expedienten Best Select") and enter the standard reduction.

By checking "Active" you can determine whether the guest card should be activated immediately or deactivate it.

3. User accounts, Login Numbers and Rights

Set up users and manage their rights for using MY POS. You may also deactivate a user here and block them in real time. The user's Service Code will be shown as soon as a user is created. This code allows instant access to the system.

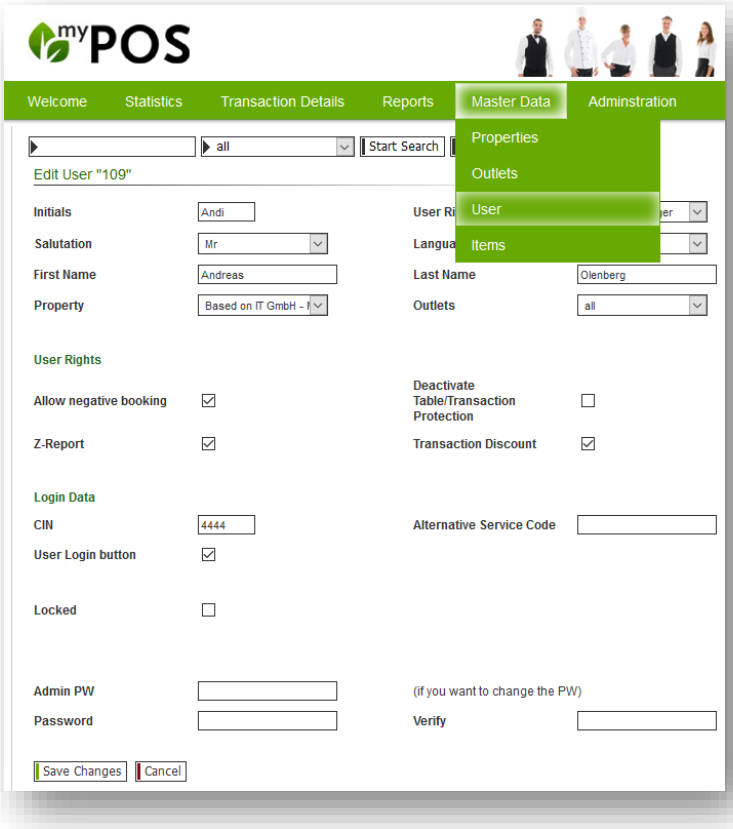
Via the tab "Users" in the main menu (or via the item "User Management" on the welcome page) you create users and set up the system permissions.

You create a new user by clicking on the "Create new user" field and appending the following information to it:

Initials: The username to log in to the backend of MY POS.

User Rights: Depending on the employee's task field, you assign him or her the appropriate rights:

- The user with the "Statistics" authorization only has access to the statistics view. In addition, a restriction to certain article categories is possible here.
- The user with the status "Service" only has access to his sales revenue
- The user with the status "Supervisor" can also cancel sales and create credits
- The "Item Manager" can also create articles, assign them to categories and edit tax rates
- The "Cashpoint Manager" has the possibility to create outlets with cashpoints, select the appropriate printer for them and adjust the printout on the receipt
- The "Property Manager" is the Admin of a property (only in Multi-Property Version)
- The "Admin" has full system rights and may edit all settings and manage users.



Salutation, first and last name: Personal user data

Language: Setting for the language of Administration and Cashpoint Screen. displaying the backend and the cash register

Property: Multi-Property Version only: where does this user work

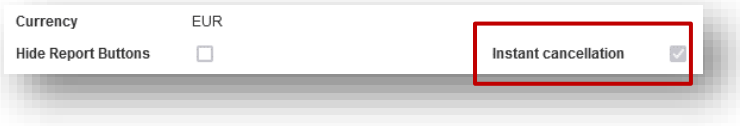
Outlets: Permitted access for this employee; choose on specific outlet or all (or all internal)

Please note: Only if an employee can access a "SPA sales point" this employee is displayed as the "specialist" in the statistics.

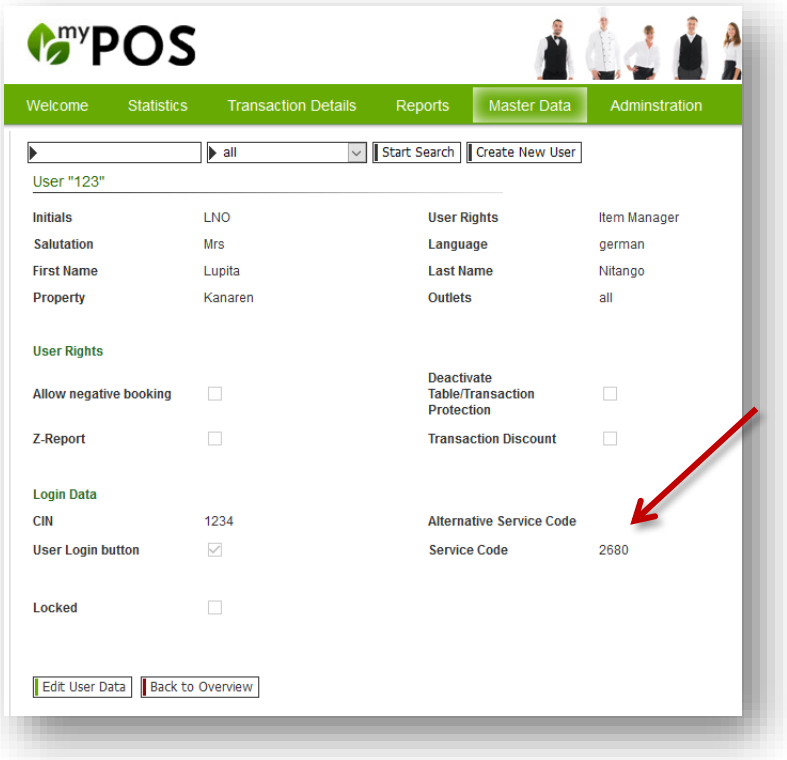
Negative Booking: By ticking the minus booking, the user is allowed to book also negative articles in the cash register.

Deactivate Table/Transaction Protection: When activated, the employee may settle external transactions without having to take over them first. However, the turnover is still assigned to the "owner" of the transaction.

CIN: The Cancellation ID may be set freely. Optionally, Service staff members, entitled to cancellation, do not have to enter their Cancellation ID additionally when cancelling, if you enable this option in the master data of your business.



To search for existing users, enter his initials, or his name, and click on ‚Start Search'. If you manage multiple properties, you can limit your search to one facility. To see all details, click on the magnifying glass next to his name in the search results.



Important: This is the user's Service Code that is needed for the MY POS cash point authorization.

4. Managing Your Outlets

Which outlets do you have in your resort? Which cash points/ terminals are assigned to them? One or more? Each cashpoint has it's defined receipt printer

Choose their printers and set which headers and footers are to be printed on the receipts. Set Happy-Hours and select payment methods.

4.1. Create a New Outlet

Please click on 'Create New Entry'.

Enter the outlet's name (it will be shown on the cash point touchscreen) and its short name (it will be shown in the cash point's login information and on the receipts), as well as the affiliation of this outlet. Enter a Tip Department Code and, in case you use Protel, the hotel number.

Choose which cashpoint type(s) you use in this outlet. If you have a spa, you can check 'SPA Outlet' to hide unnecessary functions in the cashpoint interface, like printing an entertainment receipt.
If you are connected to a Protel PMS, you will see additional settings, like Cross Posting for example. If you enable it, Cross Posting allows you to settle the bill of a guest from another one of your properties. The feature is explained under Item 2.2.

The feature 'Number of Guests per Table' is visible as soon as your outlet allows 'Both Cashpoint Types' or the 'Restaurant Cashpoint'.

If you activate this setting, you will be asked to enter the number of guests whenever you create a new table. The number of guests is used as info on the kitchen and course receipts, as well as for the meal times report. It is also used for a new feature which lets you split table invoices into equal parts and bill them partially. Activate it by checking the box next to 'Allow Invoice Split'.
Now, a new button will appear in the cashpoint front end under Table/Transaction Options, called 'Split Invoice'. If you select a table to be split, you can divide the tables positions by the number of guests at that table (or you enter a new amount). Slight deviations in the cent range may appear with the total amount of the partial bills.

Set the opening hours and day cut (applicable for restaurants and bars, this sets the time after which revenues are to be posted on the next day).

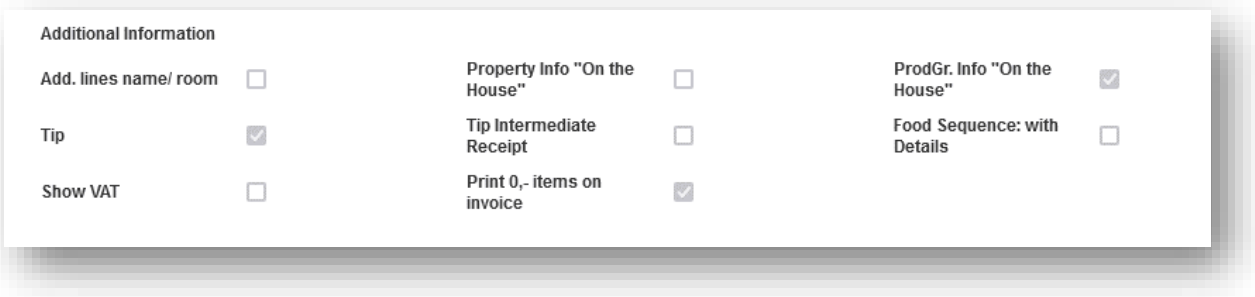
All other settings are divided and initially hidden, but you can extend the display by clicking on the plus sign or the column.

Define Happy Hour times by first activating the feature. Now the extended settings are shown and you can enter the times, and the discount rate.

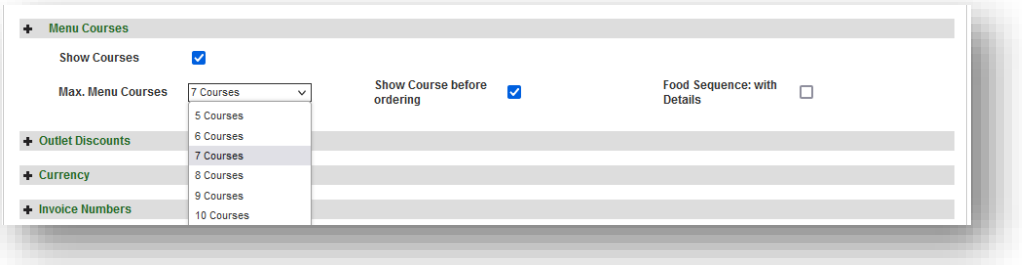
The next feature lets you assign a currency to every outlet and if you choose a currency different from Euro, advances settings will open and you can define its display on the receipt.
Furthermore, you can give the outlet an individual invoice number range, that differs from the rest of the outlets. Just check the box and define the rest.

You can also set the parameters for your outlet's receipts. Define the language, header and footer, as well as additional information and the display order of the data (you can choose 'No Display' if you do not want it shown at all). You may configure additionally:

- whether you want to handle the sequences in detailed or short form in the Cash Point and on the order slip
- whether an additional field for entering the guest name and room number is printed on the guest cheque for hotel guests
- whether the commodity group's proportionate net amounts is displayed on the inhouse receipts.

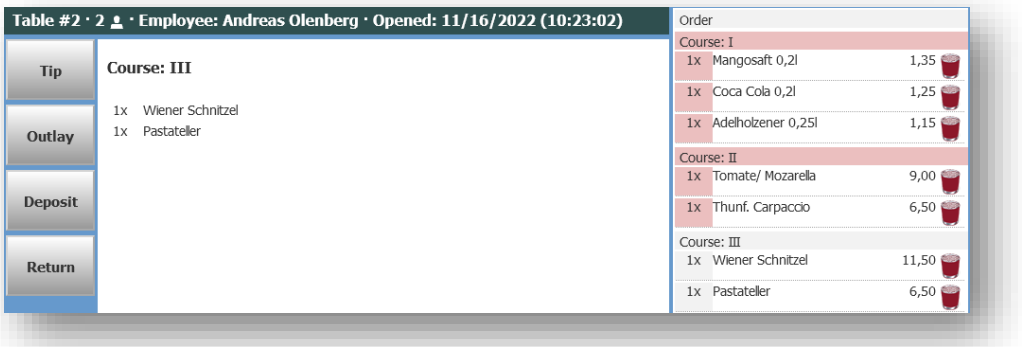


Meal Course Settings: You can set whether Menue Courses shall be used in an outlet, and if so, how many.



In another setting, you determine whether the service staff should check and confirm the next course again in the overview before ordering it.

The option is called "Show Course before ordering" and leads to the display of the selected Course in the MY POS Cashpoint. Another click on "Order" is required to trigger the order in the kitchen station. If you decide against the option of additional display, the order is given directly to the kitchen station.



You may assign several kitchen stations, for sending item order printouts or displaying orders on kitchen monitors.

In the 'Commodity Groups' fields you can choose item groups that may be sold in this outlet. They have to have been previously set under 'Administration').

You may also choose, which item types you want to be displayed in the cash point's touchscreen and therefore which items you can be booked in this outlet. If you do not want the item type to be shown, remove the check from the box and save your changes. Now every item belonging to this item type will be hidden in the touchscreen cash point(s). This feature is useful for MY SPA outlets, because you can hide the treatments, which need to exist in MY POS to be billable through a cash point.

However, if they are booked through MY POS, and not transferred from MY SPA, they will appear as sales items in the MY SPA sales report.

In order to book tips into the correct category, you have to enter a department code designating where tips are to be booked.

If you open the last column, you can activate the payment methods which are allowed in this outlet.

The new feature 'Pay Method Split' allows you to bill a table with different payment methods in case guest's want to pay separately or a guest wants to pay part of his bill with a coupon for example. To allow this feature, check the box next to 'Allow Pay Method Split'. In the payment process you can overwrite the amount for the payment method you just entered. If it is lower than the total amount of the table, the remaining amount will be shown and you can choose another payment method for the residual amount. You can find a more detailed instruction in the Frontend Manual.

Attention: For properties in countries where fiscal printers are mandatory you cannot mix internal and external payment methods!

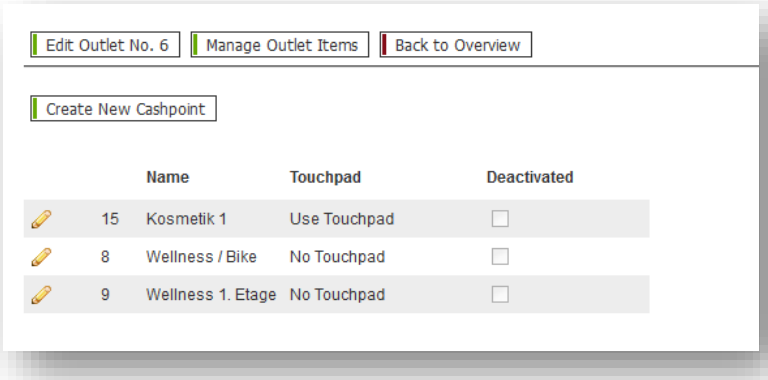
The different payment methods will be shown in the MYPOS Backend in the transaction data, in the Statistics, as well as on the daily closing reports (X- and Z-report) and will be adopted for the cancellations.

4.2. Cash Point/ Terminals

After having successfully created a new outlet, please assign one or more cash points. Click on 'Create New Cashpoint' and enter all relevant data. At least one cash point must be assigned, before you may manage items to be sold.

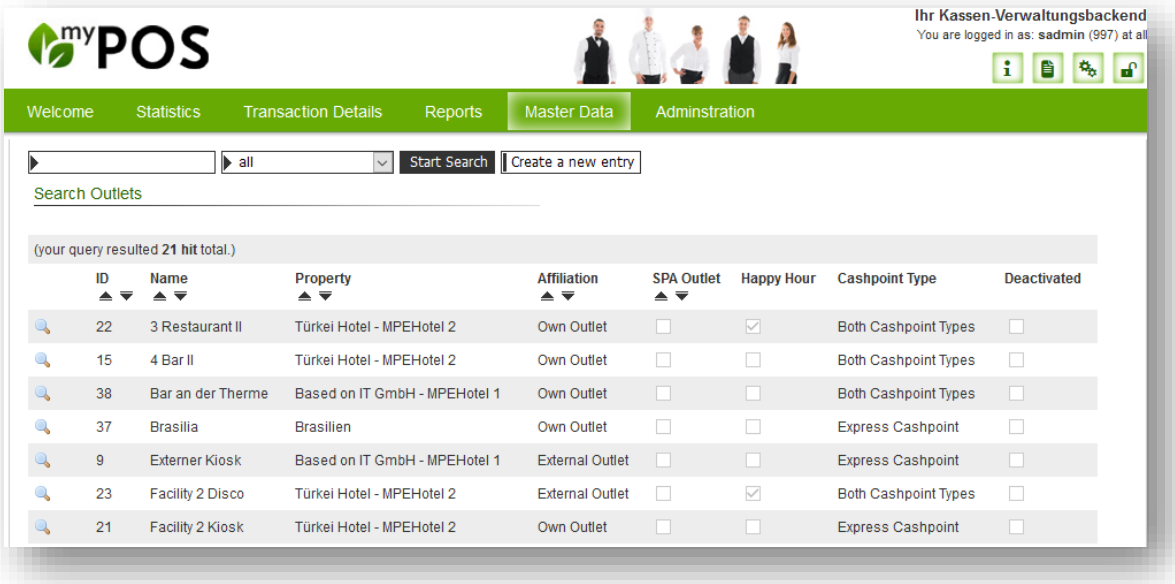
Each point of sale must have at least one cash register assigned to it in order to be able to create articles for sale.

Country-specific POS regulations may require the use of fiscal printers. These require special mappings and are described in the separate fiscalization manual.



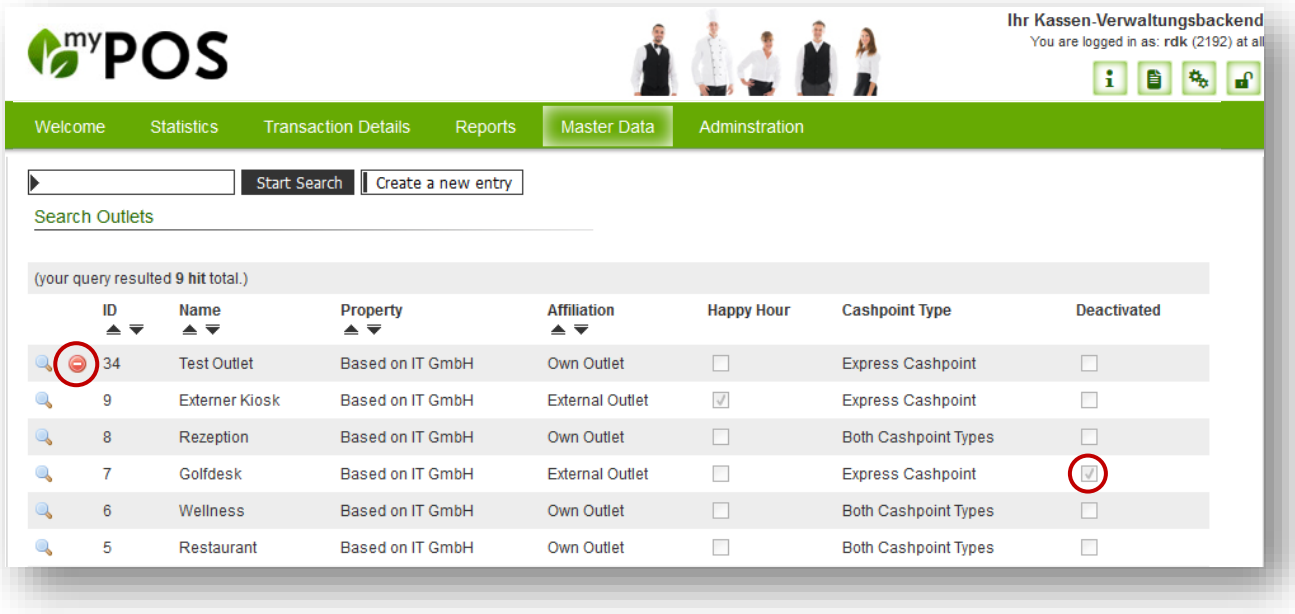
4.3. Edit Outlets

Choose 'Outlets' in the menu and click on the magnifying glass to edit an existing outlet or enter a name in the Search field and click on 'Start Search'. If you manage multiple properties in MY POS, you can limit your search to one facility or search in all of them.

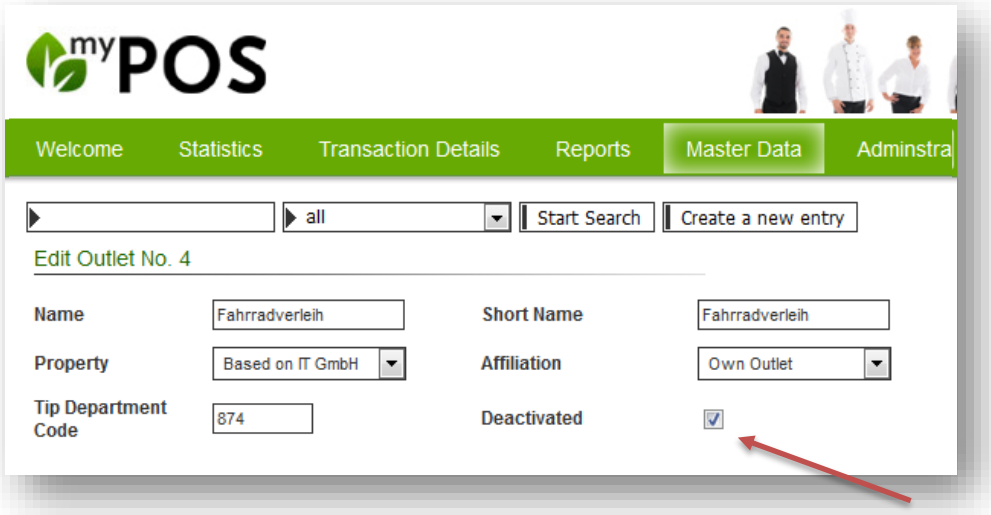


Now you will see this outlet's data. A click on 'Edit Outlet No.....' lets you edit and add all details that you find when entering a new outlet. Please confirm your changes with a click on 'Save Changes' or 'Cancel' all changes.

To delete an outlet, please go to your outlet list and click on the bin next to the magnifying glass. Please note that the basket is only seen as long as no items have been assigned and no revenue has been generated in this outlet.



If this is the case, simply click on the bin and the outlet will be deleted after having confirmed this step. If the outlet's data is relevant for sales and data history, please deactivate the outlet. Its data will be kept for the records.

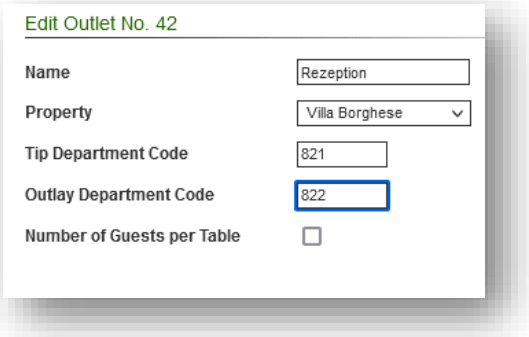


4.4. Relation to other Hotels/ Hotel Systems

Check the 'Cross Selling' Box, if you want to be able to share your products for another vendor's guests. If you check this, you will be able to post your items on customer accounts that will be settled by another hotel or vendor.

Example: Guests visiting a spa may order their meals in your self-service restaurant. This will be posted on their Spa bill.

4.5. Disbursements for guests



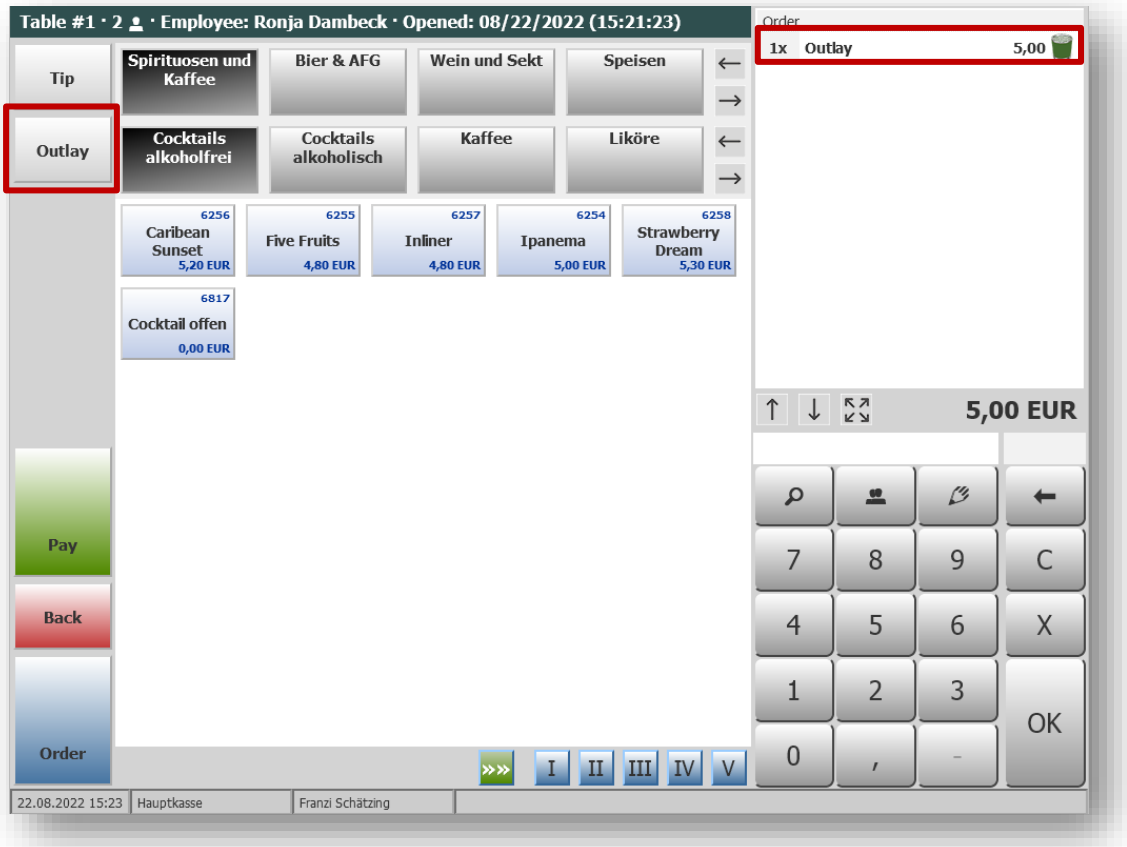
Service staff occasionally lay out cash for guests. The cash reduces the cash in their wallet, and must be earmarked for later reimbursement when booking to another payment method.

For correct transmission to the hotel system, a separate Department or Product account is booked, which must be stored in the master data of the point of sale.

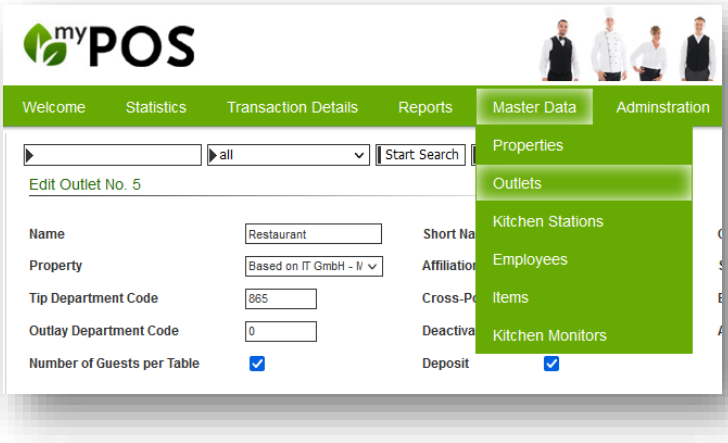
Please note that further requirements must be met:

- The country of the property must be set in the Master Data – Property Settings
- Under Administration - Payment methods, the payment method used for the disbursements must be ticked as cash payment in the sense of the fiscal country regulation according to the prperty country setting.

In the cash register interface you will now see the display button below the tip button:

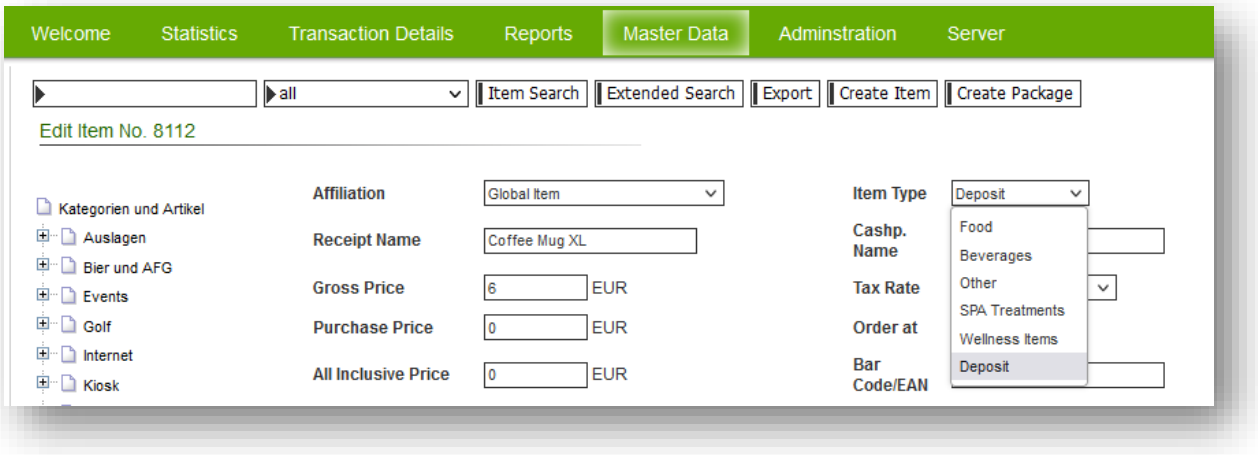


4.6. Deposit



Would you like to issue deposit items at one of your points of sale? Then please first activate the Deposit option in MY POS Administration under Master data - Outlets:

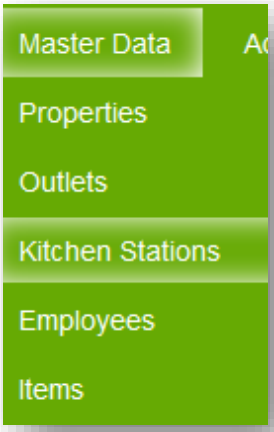
Then create the deposit items in the corresponding item subcategory. You can either manage them in their own sub-category or add them to the corresponding category. Important to know: Please select 'Deposit' as the article group and the tax rate of the content for which the deposit article is intended.



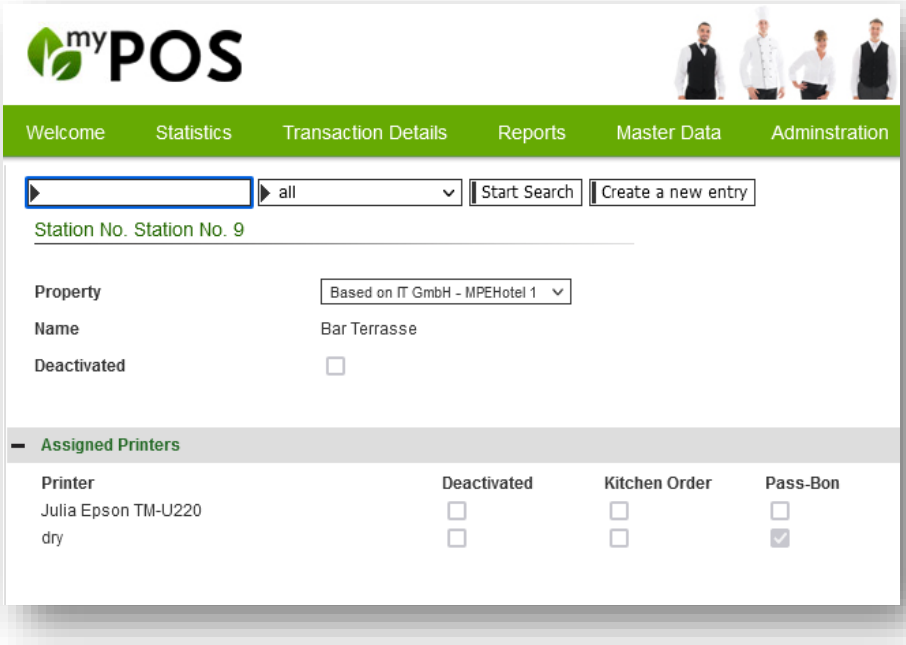
In the MY POS Touchscreen, the new button Deposit as well as Return is offered in the point of sale.

5. Kitchen Stations

Whether bar, salad kitchen, patisserie or simply kitchen - under Master Data - Kitchen stations you can create the production areas of your premises where something is produced and to which orders are sent by the service staff. You can assign printers to your stations and, with the Kitchen Monitor add-on module, also monitor views..

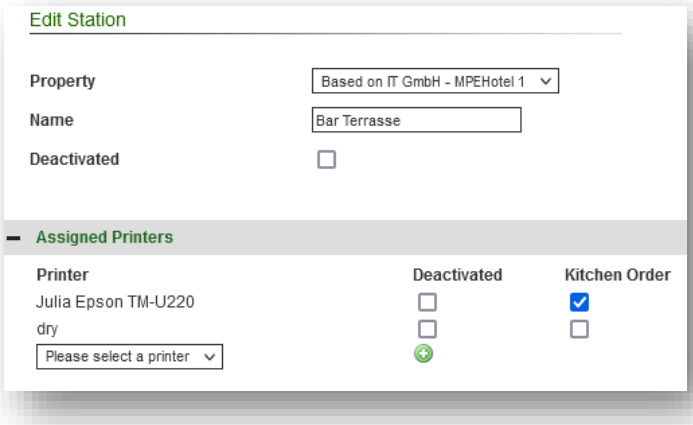


If you assign several printers to a kitchen station, orders and meal courses are sent to these printers simultaneously..

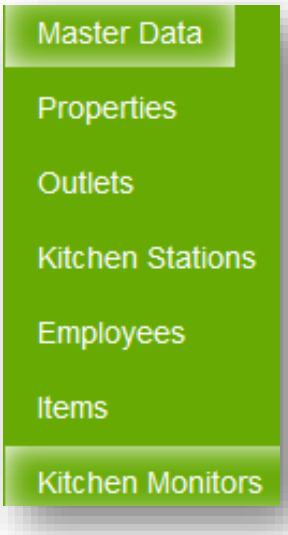


To assign new printers to a kitchen station, select the desired printer from the list of your previously created printers and save your printer selection first. You can select several printers in one step by clicking on the + icon.

Edit the station again to define whether kitchen receipts for orders and meal courses are to be issued to these printers and, if you use the Kitchen Monitor add-on module, whether individual receipts per booked item are to be generated at the pass.



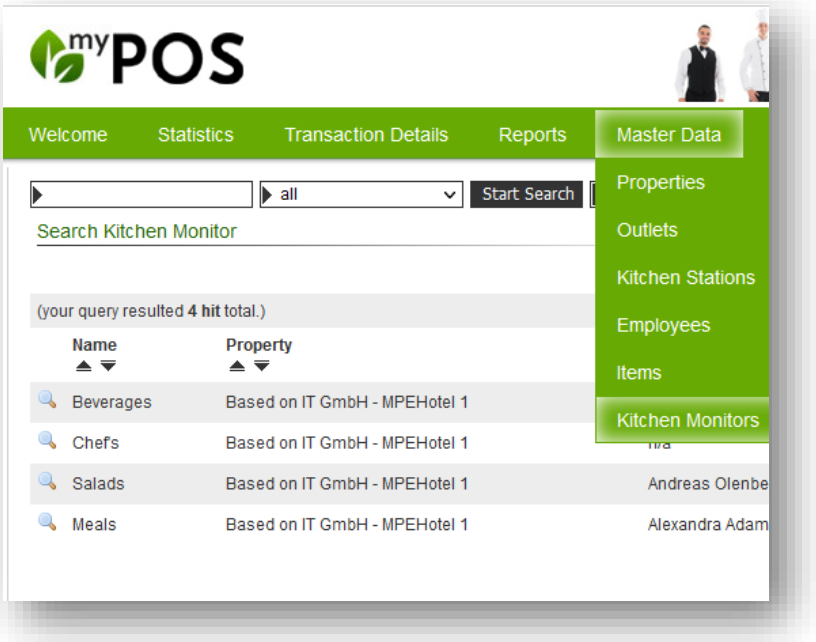
5.1. Content setup of monitors



Once you have purchased the MY POS module licence Kitchen Monitor, you will see an additional sub-menu item 'Kitchen Monitors' in the MY POS Administration.

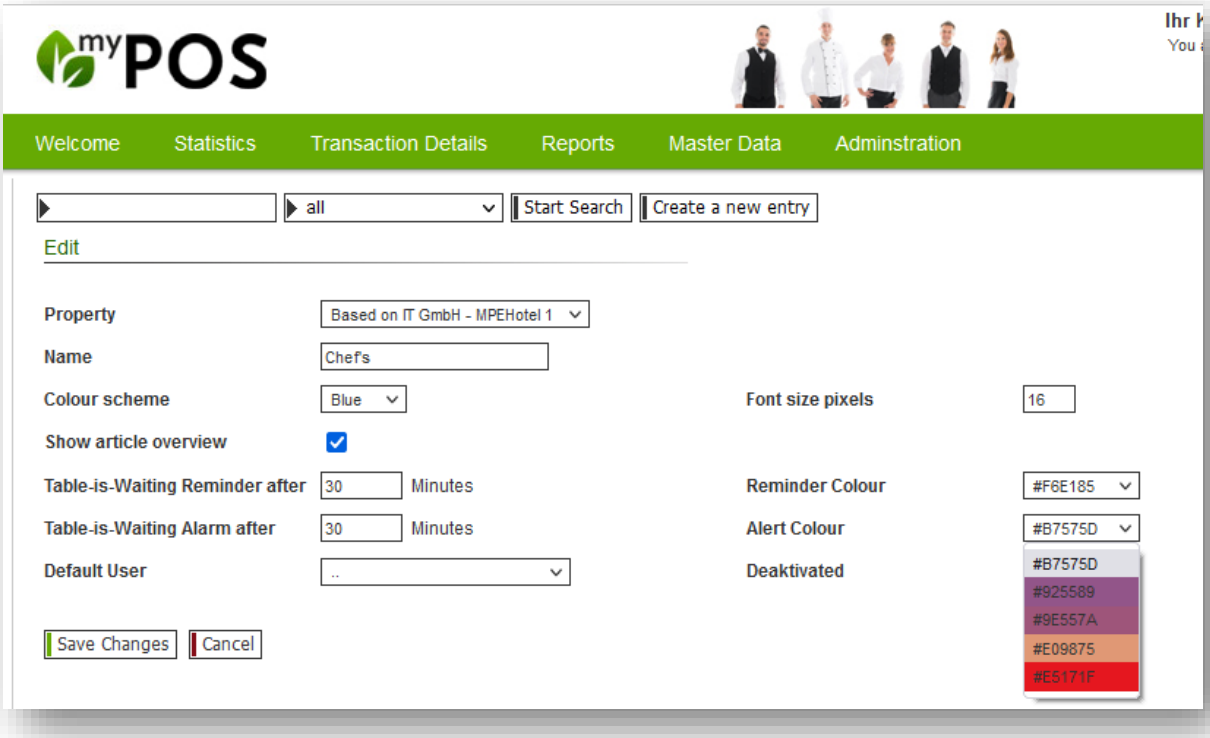
The first step is to configure your monitor views. There is no need for technical assignment by means of IP addresses, but you use this to control the views between which you want to be able to switch within a business, for example a 'Salads' view in which you see all the processes that contain salad orders. Or a view for the counter, where you want to see all the transactions. Or a view for the bar in which only the drinks orders are shown. Or a view of all orders for the Service Chef. You can configure as many kitchen monitor views as you like.

Select the menu item Master Data - Kitchen Monitors - New Entry. Enter the name of the monitor view. This can be whatever your stations are named, but you can also create a view 'All dishes', or 'Food and drinks' or 'Salads' within a station, for example. On a physical monitor, you can switch between the monitor views during operation.



In the configuration of the kitchen monitor view you determine:

- A colour scheme – contrasts in blue or grey
- Ob die Liste der Bestellungen zusätzlich zu den Tischen mit ihren Einzelbestellungen gezeigt werden soll
- After which waiting time the tables should be displayed at the top of the priority and in which colour a reminder or warning that guests are waiting for a long time should be shown
- The font size of the display
- A default user for operating the kitchen monitor view.

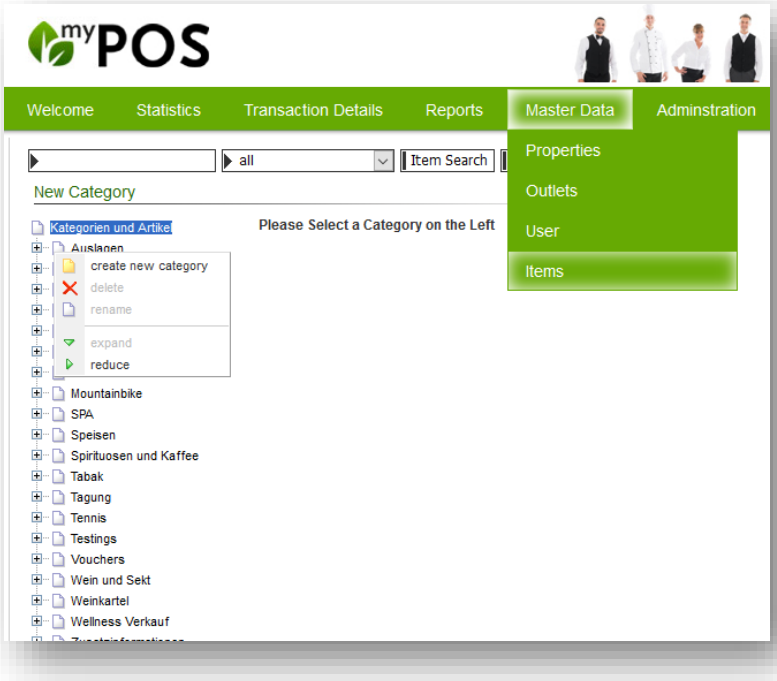


You can select an existing employee for this, or let your staff log in personally when they start working at the monitor. In order not to make it too inconvenient, login buttons are set up in MY POS Administration under Master data - Employees for changing employees at a monitor:

6. Categories and Items

Choose 'Items' from the menu to manage your range of products and services. Create and edit main and sub-categories as well as individual items.

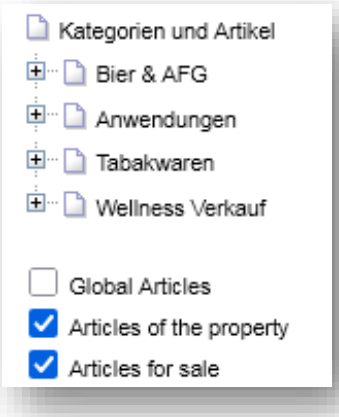
On the left you will find the categories depicted in a tree structure. Right-click in the structure opens options. Depending on the hierarchy, you can then create a new category, sub-category or item.



6.1. Categories

This cash point system tracks data history for reports. So deleting a category is only possible as long as it has no subcategories, and the subcategories have no items. If these criteria are met, a right-click offers the option to delete it. If the 'Delete' option is greyed out, please delete the items or subcategories first.

6.1.1. Filter Categories



An additional filter option at the bottom of the category tree makes it possible to restrict the view to categories whose items have the following properties:

Global articles: Categories with articles that have been created for all sites within the POS system

Articles of the company: Restriction to articles that were created by the company of the created user.

Items for sale: Only items that are assigned to at least one sales outlet assigned to the logged-in user's company and are active there are shown.

6.1.2. Relationship to MY POS Cashpoint Touchscreen

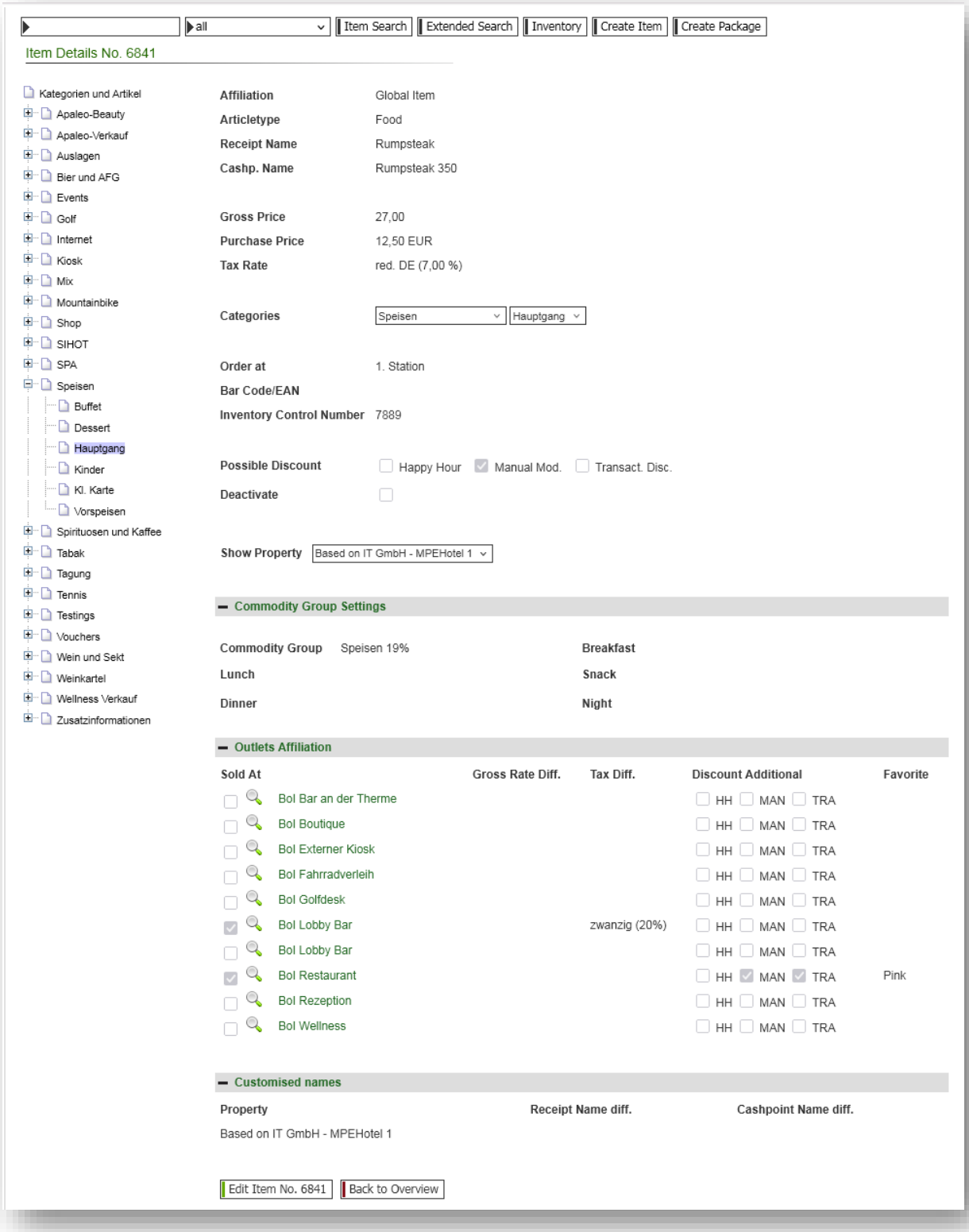
Please keep in mind that whatever categories and items you generate here are shown on the cash points. So you might want to take the teams opinion into consideration: which categories are easy to understand and find and which allow for quick entries.

We recommend creating four main categories, each having four subcategories *per outlet*. Which categories are shown on the outlet's cash points is determined by the items sold there. So, even if you choose to sell just one brand of cigarettes in your shop by the pool (and all the others only in the bar), the main category 'Tobacco', with its subcategory 'Cigarettes', would be shown on the pool shop's cash point. So, if you have several outlets in your resort, take time to plan this carefully.

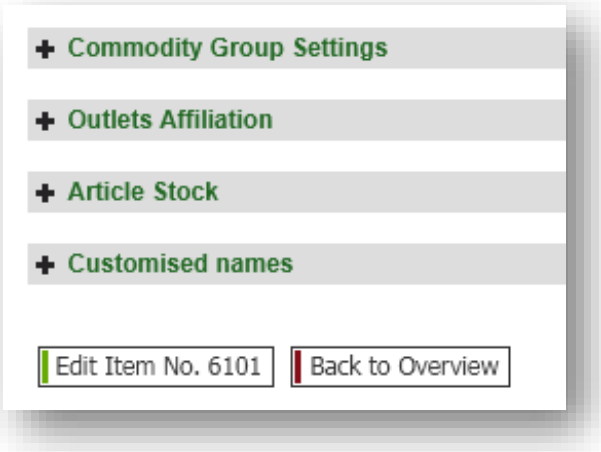
6.2. Items

6.2.1. Main Item Data

The article details above are followed by product group settings, assignment to points of sale and, if it is a multi-property POS system, different designations per establishment.



All subject areas can be expanded and collapsed. You will see the item stock option if you have connected a merchandise management system or activated MY POS's internal merchandise management. The Customised name option appears in a multi-property POS system installation with several businesses.



6.2.2. Creating Items

First, please choose a category and a subcategory. You will get a list of all the items in this subcategory. A new button will appear next to the Search field: 'Create Item'.
Enter all characteristics of this new item and confirm your entries with a click on 'Create Item'.

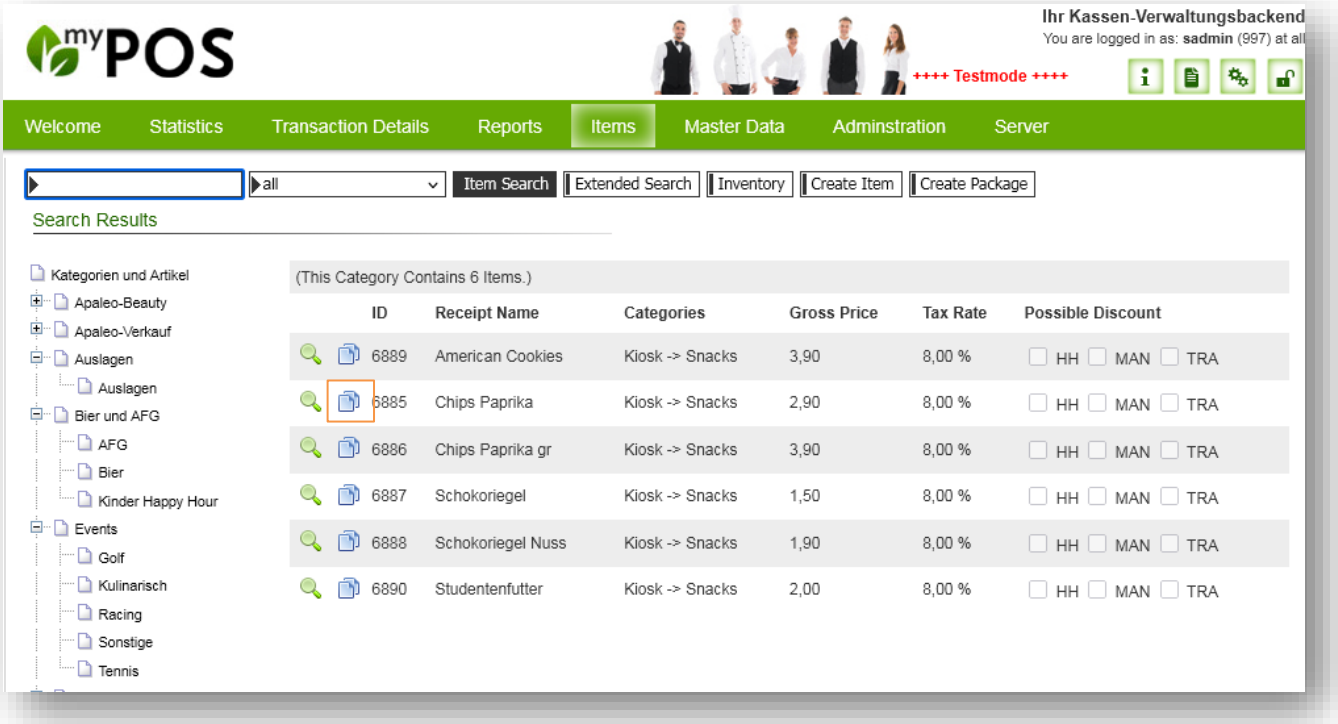
- *Affiliation:* choose a property or define it as a global item
- *Receipt Name*: shown on the receipt
- *Cashpoint Name*: shown on the cash point and internal printouts (kitchen)
- *Item's gross price*
- *Item's purchase price*
- *Item's All Inclusive price*
- *Tax rate*
- *Commodity Group*
- *Kitchen Printer* – if the posting of this item should start a printout in the kitchen or the bar, please choose the printer that was set in 'Outlets'.
- *Inventory Control Number*
- *Barcode / EAN*
- *Commission*
- *Possible Discount (VIP, Happy Hour, Manual, All Inclusive)*
- *Payable by voucher/coupon*
- *Deactivate*: The item is not shown on the cash point
- *Differing Discounts*: If the VIP discount is checked, you may change the guest card's deduction for this item manually. The normal guest card deduction is shown in brackets. They are overwritten by your entries, but not changed in general. If they are ok, you don't have to enter anything.
- *Categories*
- *Sold at:* Define where you want this item sold and set deviating prices, taxes and discounts. A new feature now allows you to give your bestselling articles, for example, a different color. When an item is favored, it will not only be highlighted in the cash-points frontend, but also shown at the top of the item list.
- *Property:* Here you can enter different item names which will be used for this property's cash point display and receipts.

6.2.3. Copy Items

To create new sales items more quickly, first select the category and sub-category on the left, create the first item and then click on the Save and copy option after entering the item data.

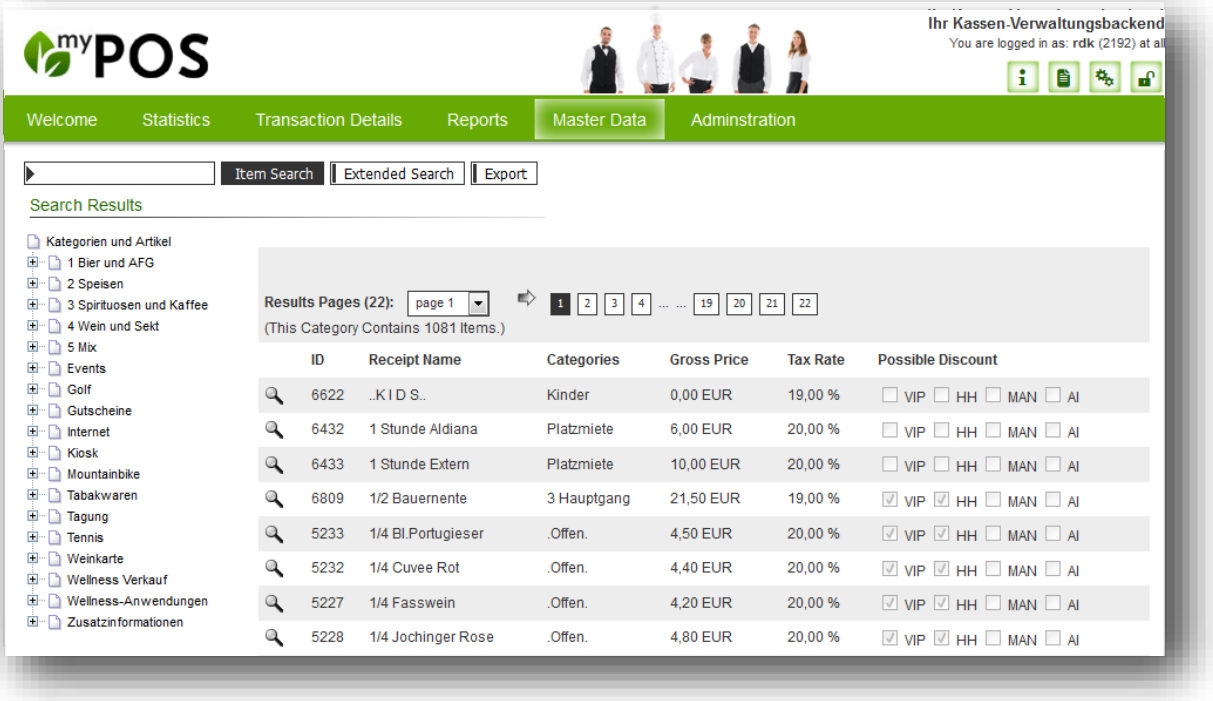
Another item with the same content will be created directly, in which you can also adjust the name and price.

To copy an existing article, call up the list of articles in a super- and subcategory and copy a similar article by clicking on the icon



6.2.4. Item Search

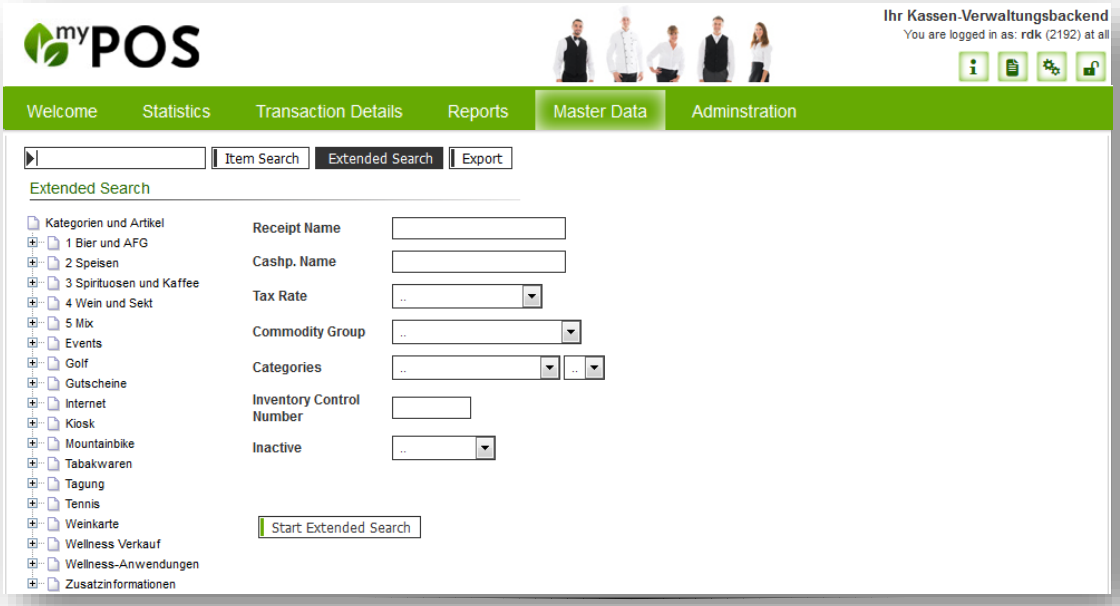
Just enter the item's name or even its initial letters and click on 'Item Search'.



All matching items are listed and may be edited individually by clicking on the magnifying glass or all together with a click on 'Bulk Changes'.

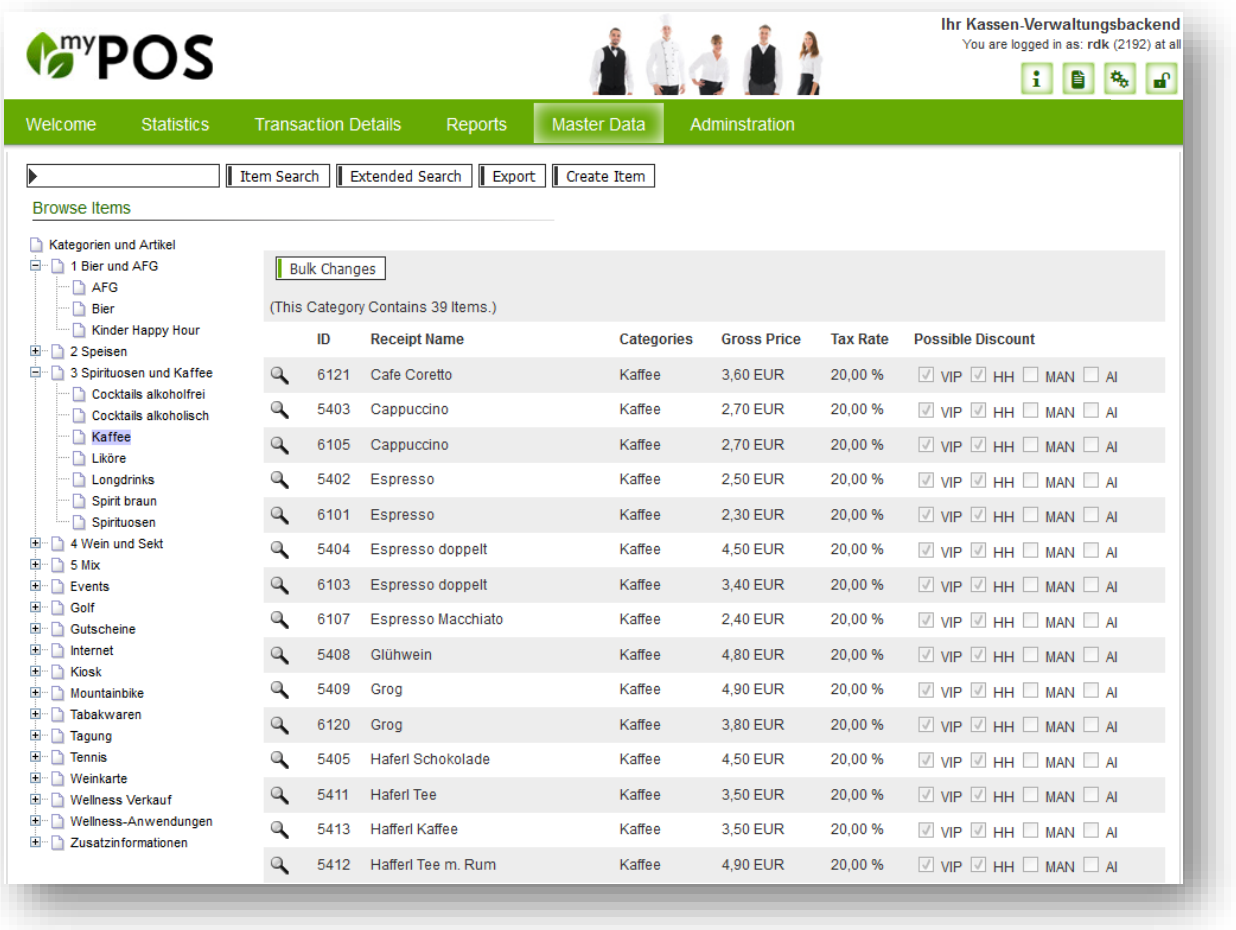
6.2.5. Extended Item Search

A click on 'Extended Search' will let you search items not only by name, but also by its characteristics – for instance by tax rate or kitchen name. Choose the item's properties and start the search with a click on 'Start Extended Search'.



6.2.6. Edit Items

Click on the magnifying glass next to the item on the list to see all the details for this item. Scroll down to the end of the entries and click on 'Edit Item No. ….', if you wish to edit the data. Confirm your new entries by clicking on 'Save Changes'. A click on 'Cancel' ignores all changes you have made and leaves the items information unchanged.



Every Backend User with administrative authorization may change prices directly in the table. Enter the new prices (The 'tab' takes you through quickly) and confirm your changes by clicking on 'Change the price'.

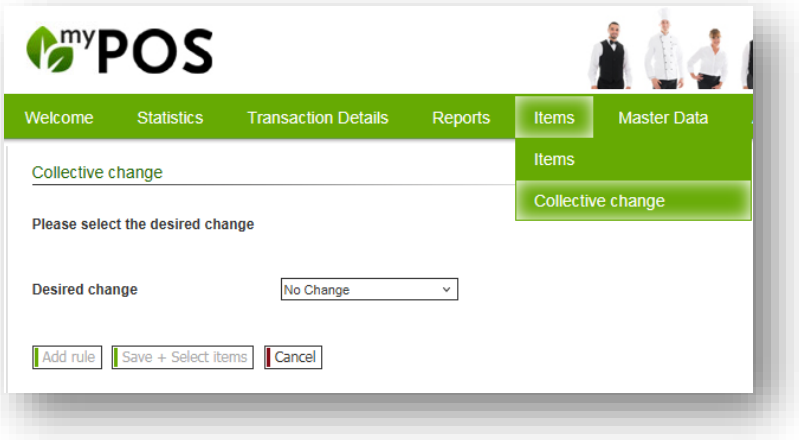
6.2.7. Delete Items

Deleting items is only possible as long as the item has not yet generated revenue. In this case, you'll want to keep the item's data for the item history. If you don't want this item to be sold anymore, check the 'Deactivate' box, and the item will not be shown on the cash points.

6.3. Global Item Changes

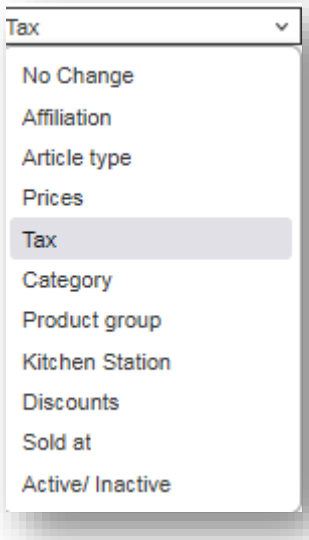
It is possible to change certain features of many articles at the same time under the menu item Article - Collective change.

6.3.1. Step 1: Create rules for the planned changes



Before you select the items for which you want to make changes, you determine what exactly you want to do. You will see an offer for typical changes with the possible criteria and areas of validity in each case. You can define several rules for changes one after the other.

Once you have selected what you want to change, you determine the scope of validity, which looks different depending on the option you have selected, but also whether you have a single or multi-property POS system.



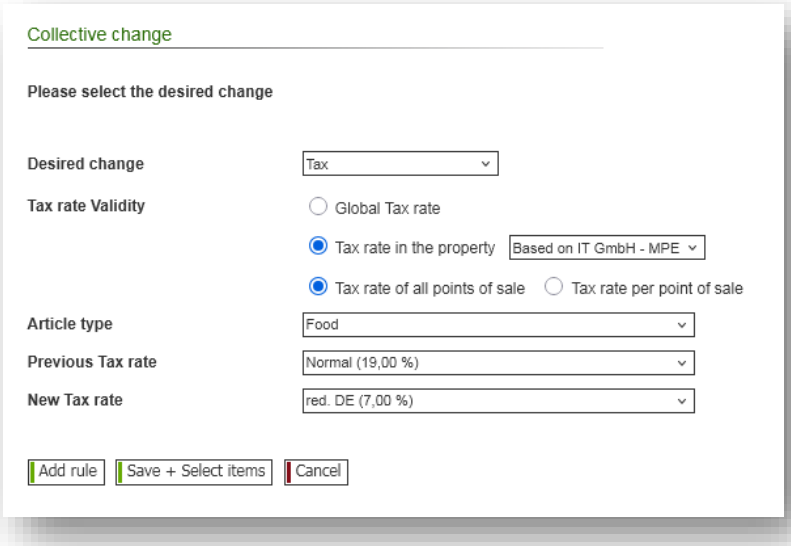
The validity of your rule is important for all changes to article data that you can configure differently in your sales outlets.

For example: A cup of coffee has a general tax rate and standard price. However, it costs more at your beach bar point of sale and has a different tax rate at your out-of-home point of sale. This determines whether you want to make your planned change for the standard price, for a specific point of sale or for all points of sale.

Global validity: If you have not entered any different prices in your points of sale, it is sufficient to change the changes in the item master data in its global data. Changes are not applied to data that already differs from this in the points of sale.

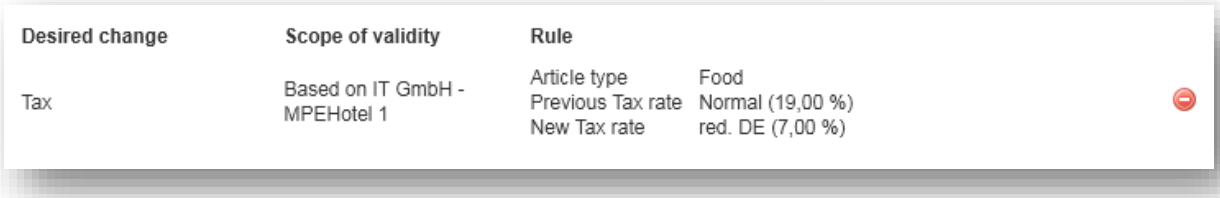
However, if you have created different data for each sales outlet or company, select the **Validity in all sales outlets** option: Here, changes take effect in all points of sale. This does not change the data in the basic data record, but you can add this as a second rule.

Validity per point of sale: From the list of your points of sale, select all those for which you want to make the changes.



Save the rule according to which you want to make your change and you will receive a summary of your planned changes.

You can delete the rule again by clicking on the red icon.



Add further rules that you want to run at the same time for the same group of items that you will select in step 2:

Article type – Various articles may have an incorrect article type or should be assigned to a different one

Prices – Enter price changes collectively to work quickly per category in the event of a price adjustment. You may change manually per item in the next step, or you may adopt the gobal price and ovrwrite all individula settings per outlet in one step.

Category - for a collective move of articles from one subcategory to another

Product group – New, more differentiated product groups have been added to your existing product groups? Once new ones have been created, you can define changes.

Kitchen station – Have your drinks been ordered from Station 3 so far? Change this to a new station here.

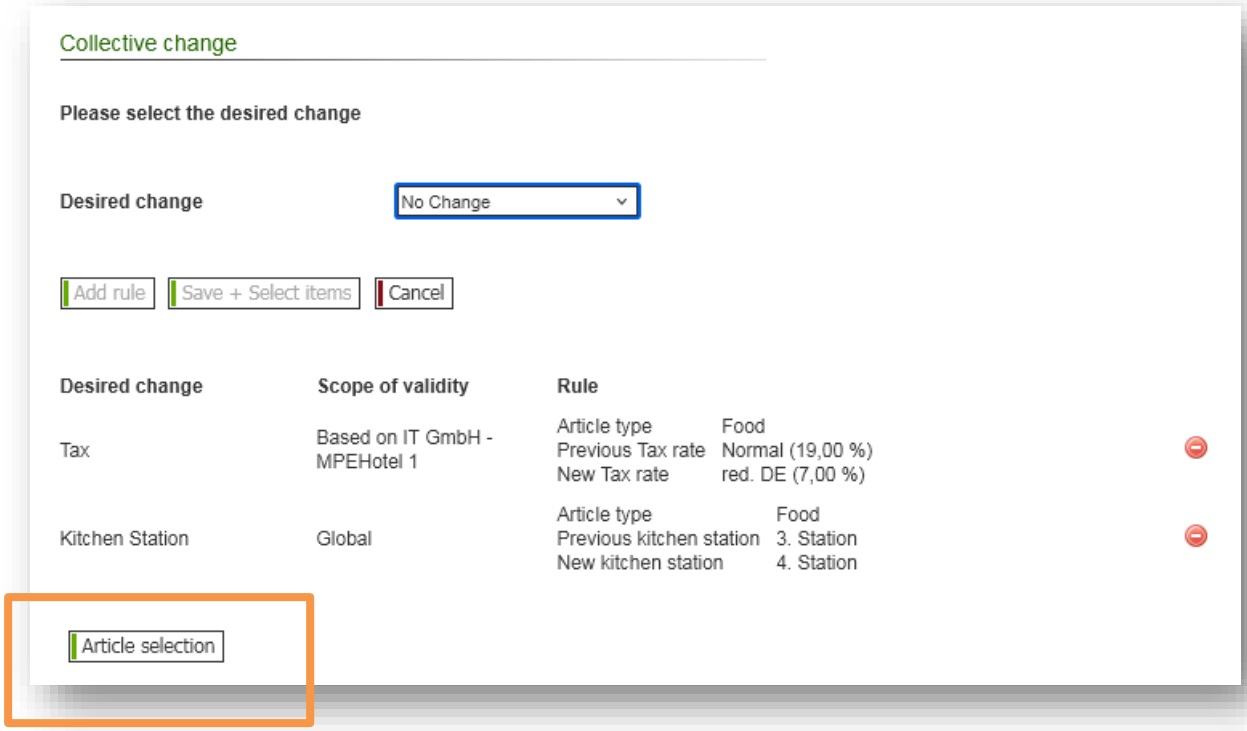
Discounts – You would like to authorise price changes for certain items - manual price changes, transaction discounts or happy hour discounts

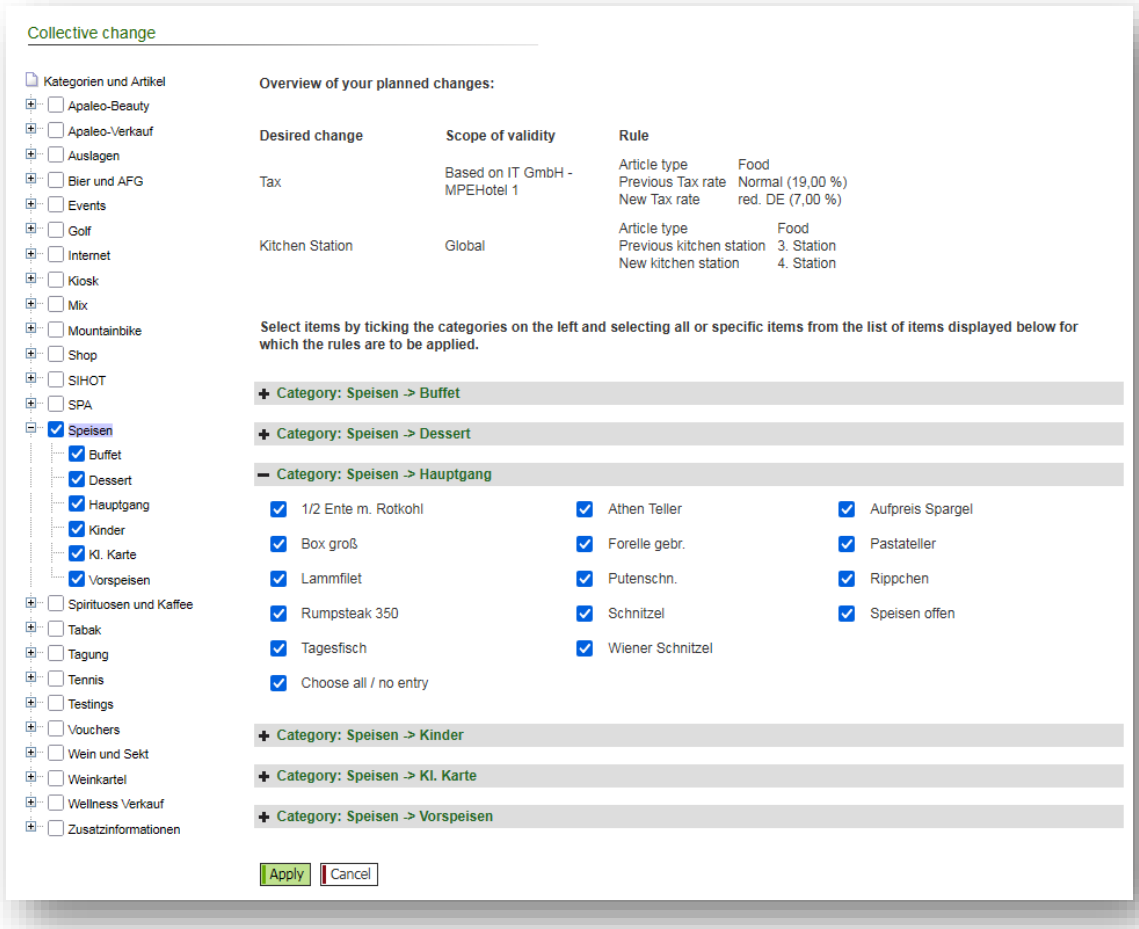
Sold at - regulates the availability of the articles in the points of sale

Active/ Inactive – enter the state of items from aktice to inactive or vice versa.

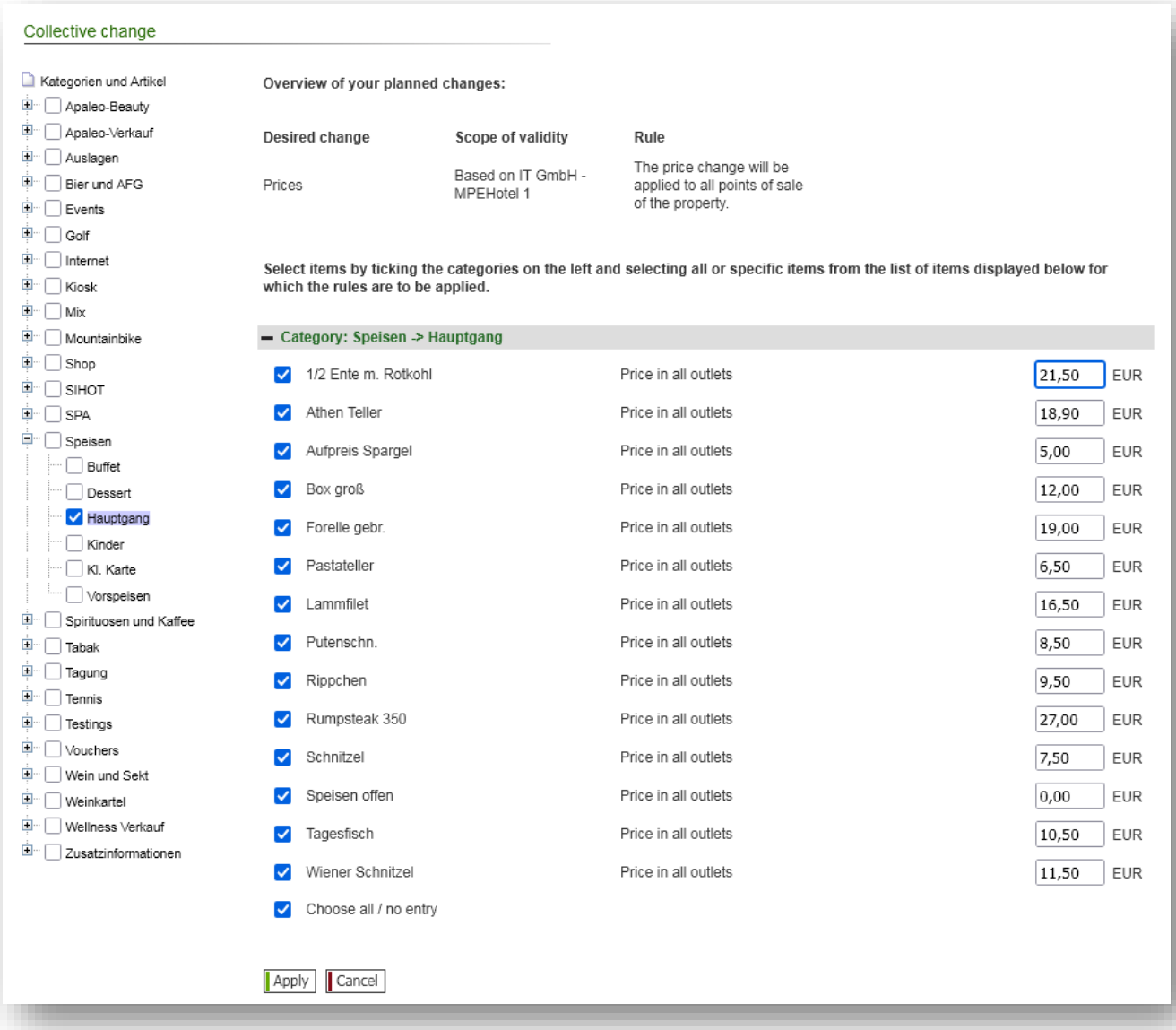
6.3.2. Step 2: Select items for the collective change

Have you collected all the rules? In the next step, select the items to which the rules are to be applied. The category tree opens on the left and offers you the selection of super- and subcategories with checkboxes.



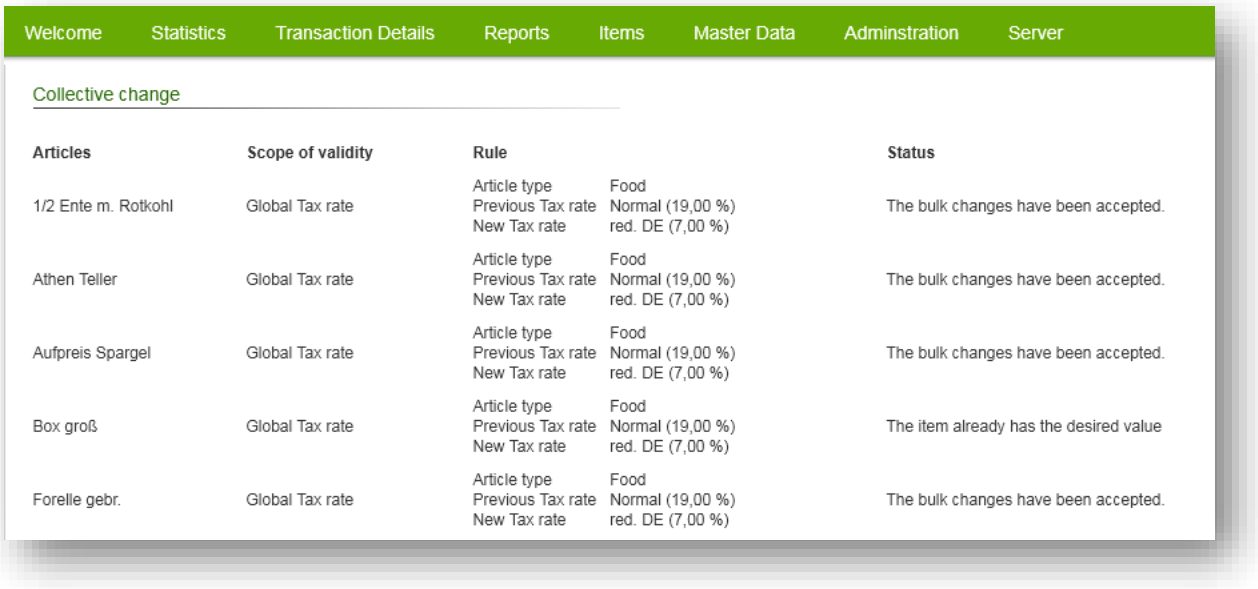


After selecting a category, the assigned articles are displayed and can be individually selected or deselected. In the event of a price change, you will find fields for price entries on the right next to the items.



Click on Apply to confirm your selection.

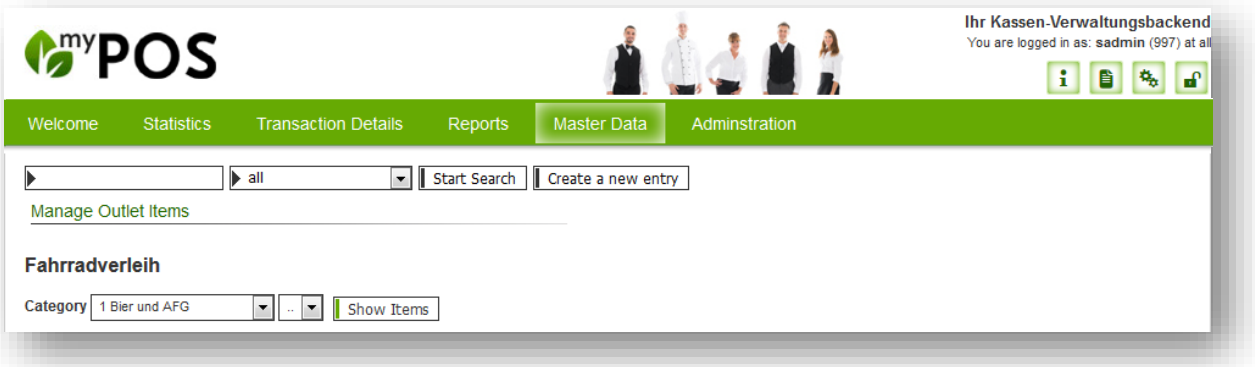
You will then receive a list of all edited items and information on the status of the change: whether they have been changed, and if not, why not.



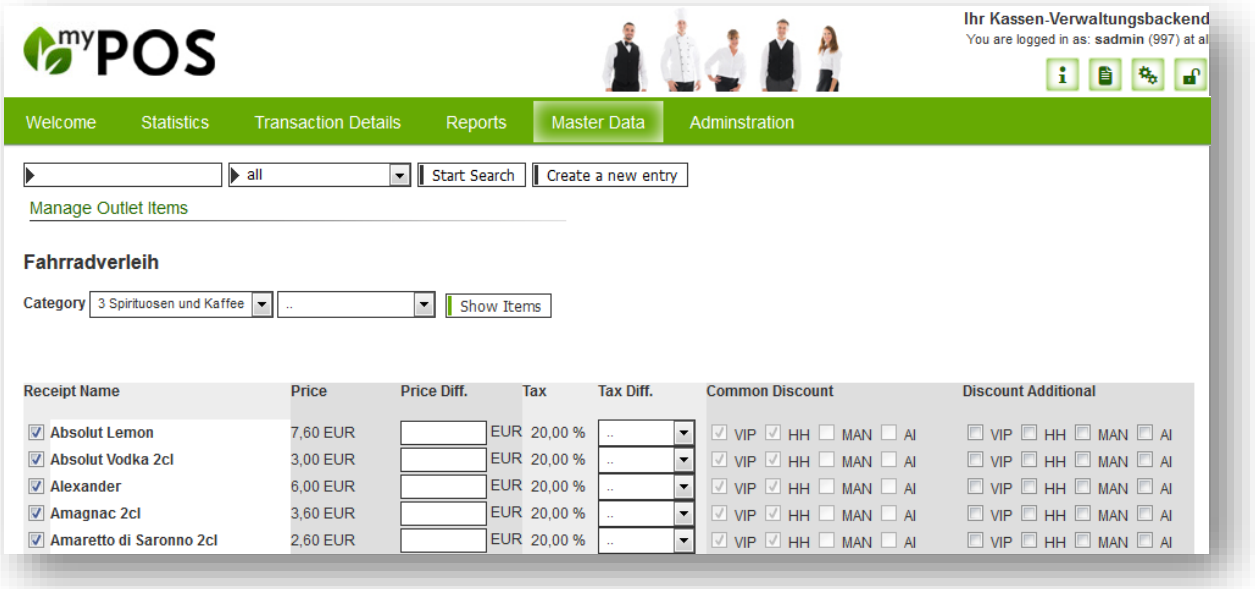
Please note: Article data originating from an external system cannot be changed. Similarly, items shared in a multi-property business can only be changed by a property admin of a business.

6.4. Managing Outlet Items

Please choose an outlet by clicking on the magnifying glass next to it. Scroll down and click on 'Manage Outlet Items'.

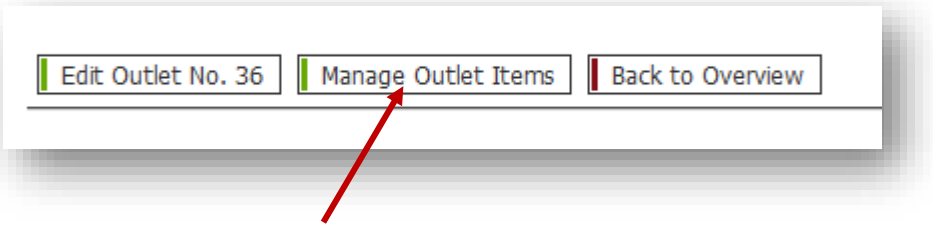


Now select a category and click on 'Show Items'. Each item is shown with its price and tax rate. You may set a discount for this outlet by checking the boxes of preset deductions for VIP, Happy Hour, All Inclusive Price or MAN (manual reduction).

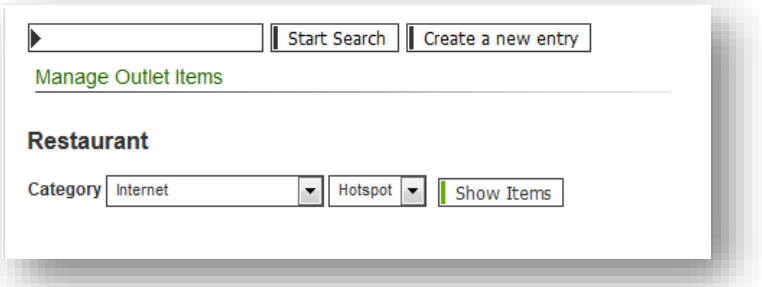


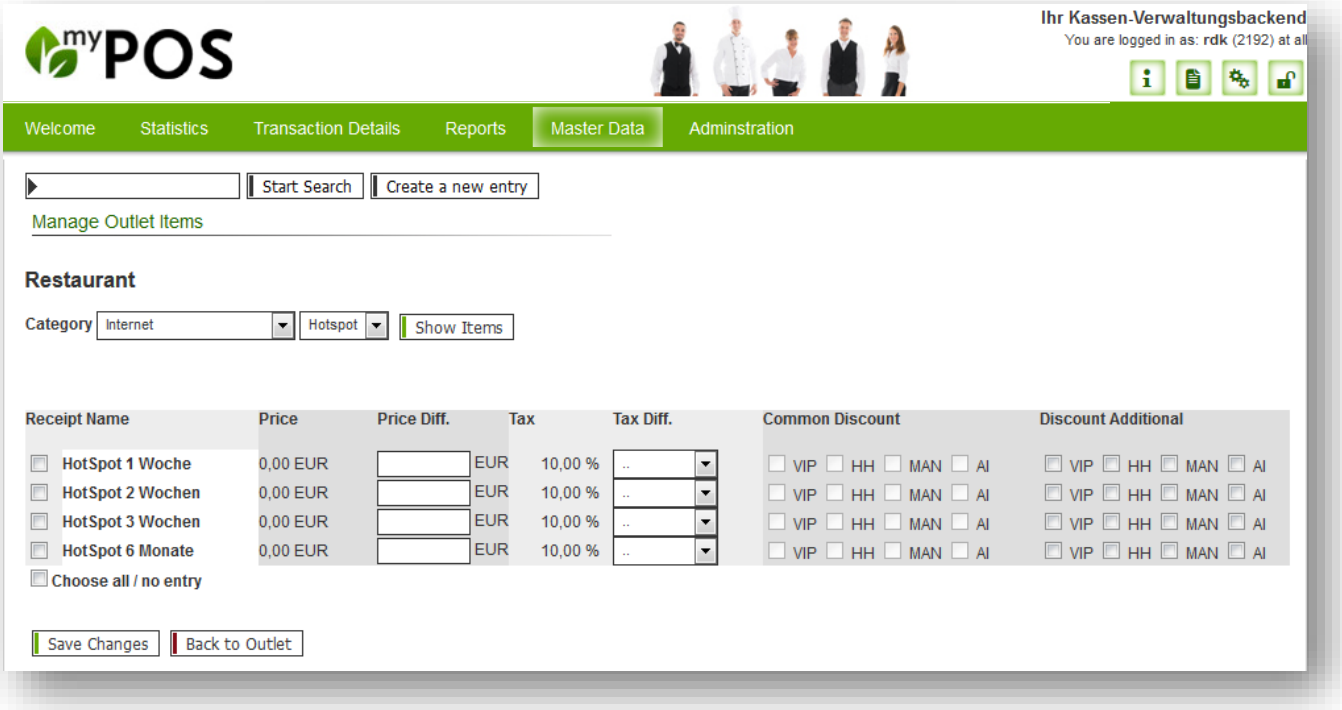
Confirm your changes with a click on 'Save Changes' or discard your changes by clicking on 'Back to Outlet'.

If you wish to assign items to another outlet, it is easier to do this in the Outlet administration. Choose your outlet, scroll down and click on 'Manage Outlet Items'.



Now choose a category and sub-category and check all items which are to be sold here.

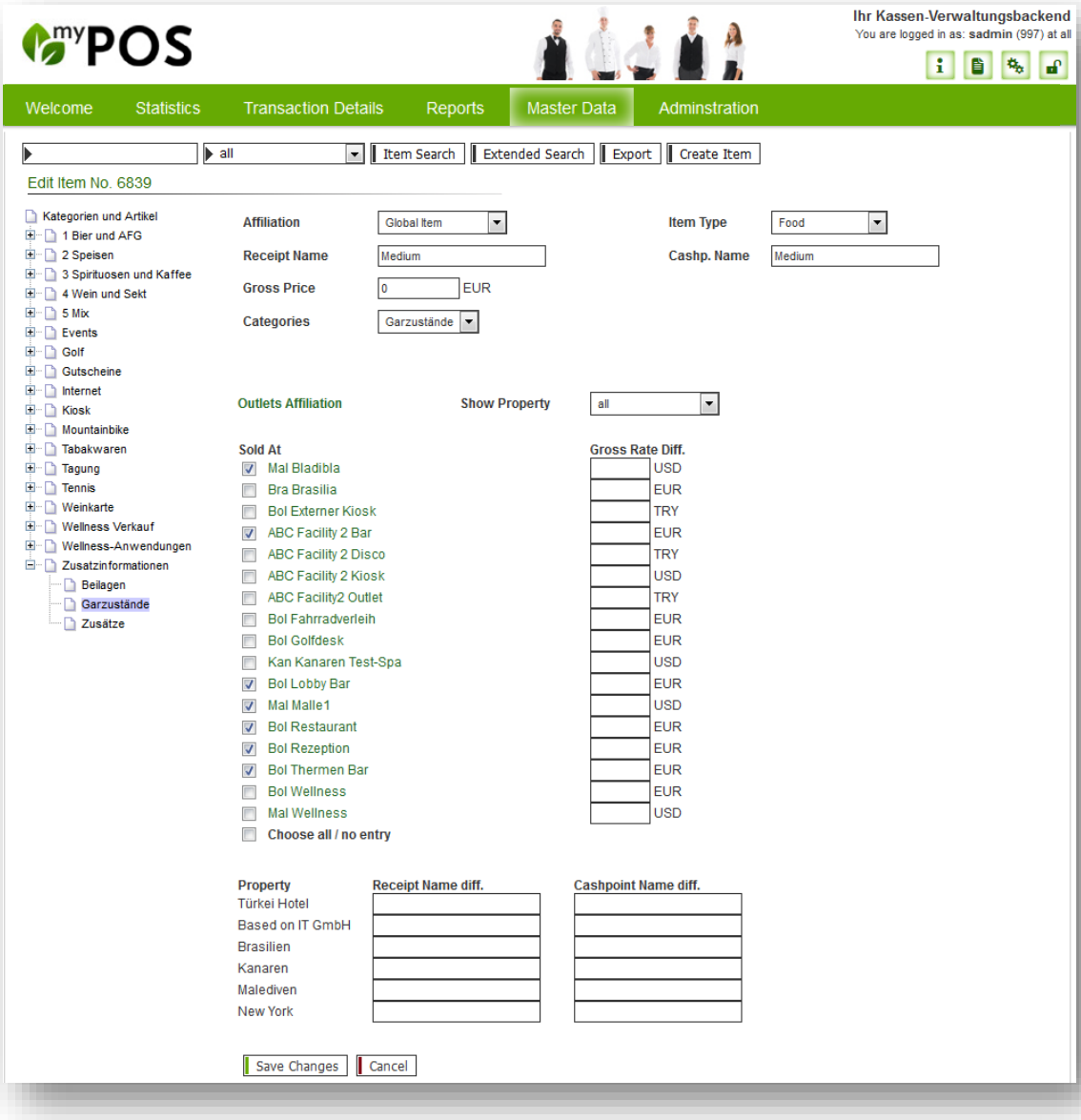




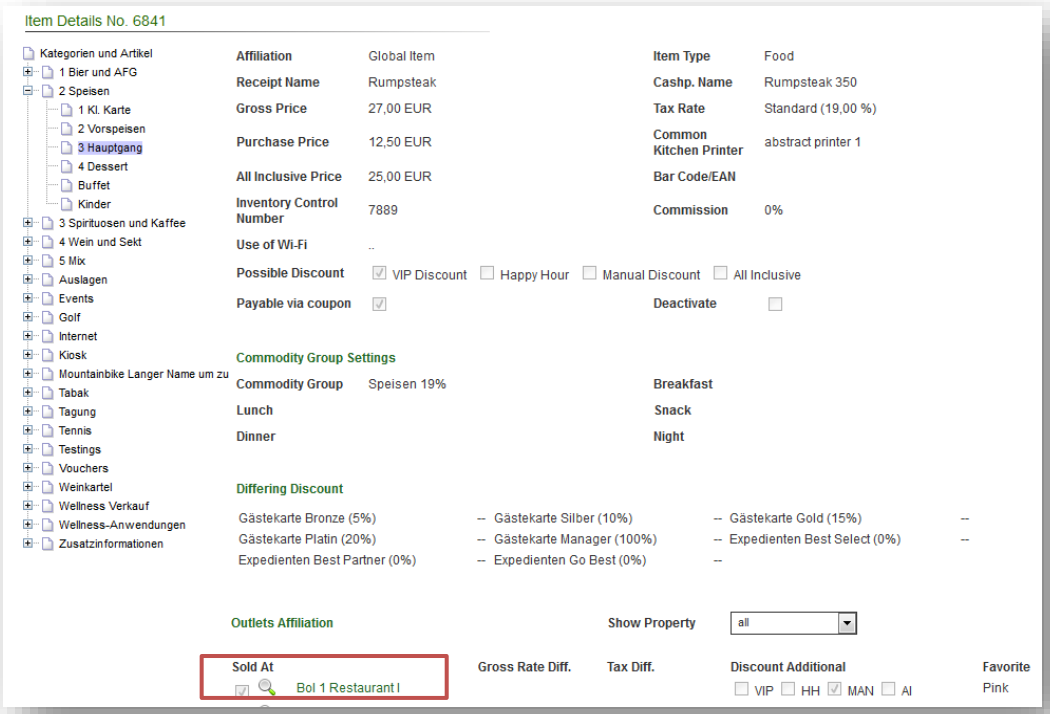
6.5. Medium or Rare?

MY POS allows to enter additional item information, such as the degree of meat doneness (from medium rare to well done), the course (as a starter or a main course?) or various toppings.

To see additional order details in the cash point, please enter your subcategories and order information in the category 'Zusatzinformationen'. Please choose the outlets offering this extra information. You can also add differing names for each property's receipts and cashpoints.

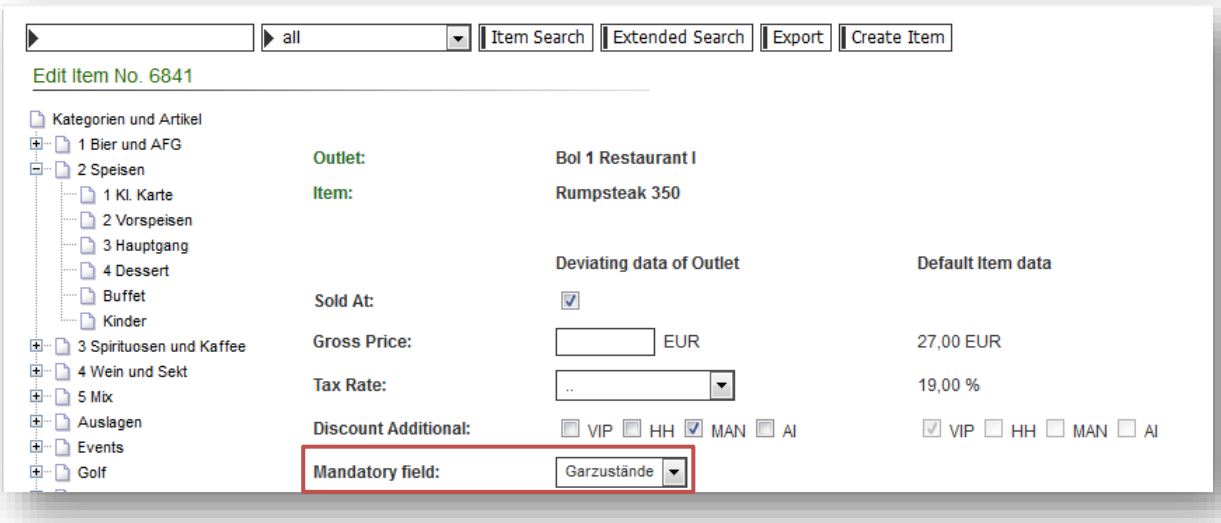


Certain Categories of Additional Information, like desired meat consistency, may be chosen as required specification during the booking process. Open an item category and choose an item.

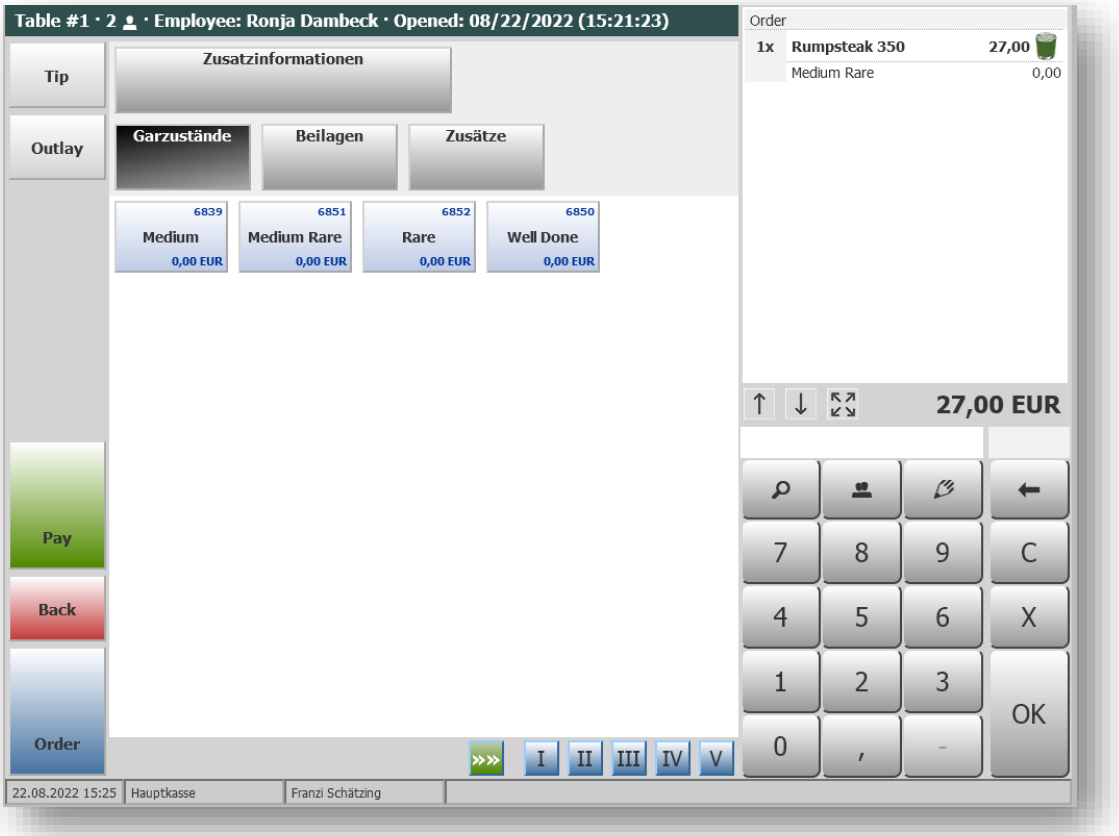


Next to the Outlet, where this article is sold, you see a magnifying glass.

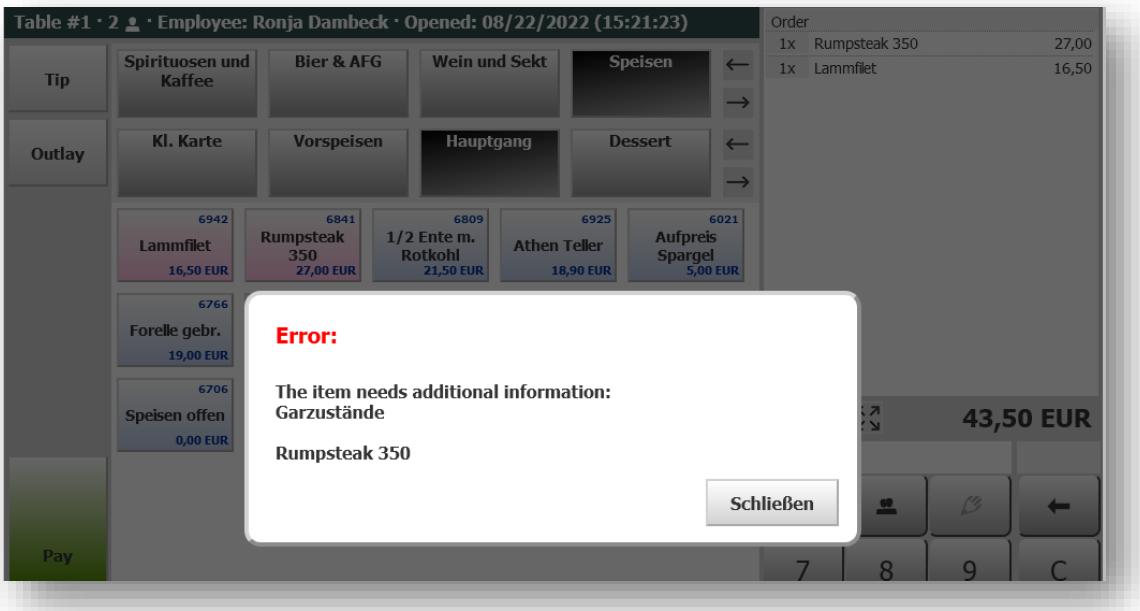
With a click, an item-detail view opens, where the settings for the item in this outlet may be managed. Now you may choose an Additional Information Category as mandatory.



With this done, whenever the staff member books this item, he or she will be lead to the chosen category of Additional Information. Without choosing one, it is not possible to close the booking.



It is possible, to enter Additional Information of another kind, not being mandatory information, but nevertheless there will be an error message when ordering or billing, until the required specification is entered.



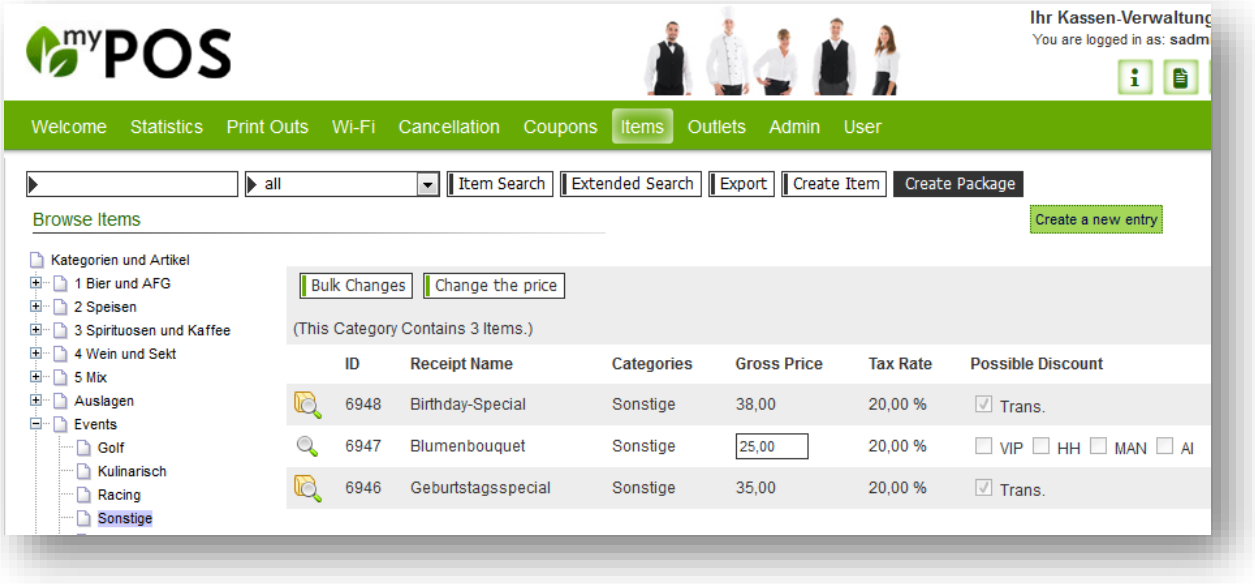
6.6. Item Bundles

The function ‚Article Packages' allows to freely choose articles from your list and combine them to a new package, which is sold in one property. Mixing items is possible throughout one properties' outlets, but only if they are internal ones.

Some fiscal laws require to show the package item's VAT separately on the receipts. Therefore, each package item is posted to guest and revenue accounts with their individual VATs.

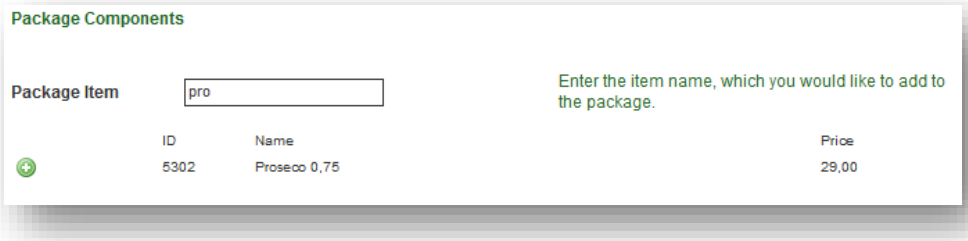
Create a Package

Go to the MY POS Administration Backend and choose 'Items'. Select the desired category and sub-category for your package. Klick on the new button ‚Create Package' and choose the property, to which the package shall be assigned. Enter names for receipt and cashpoint.

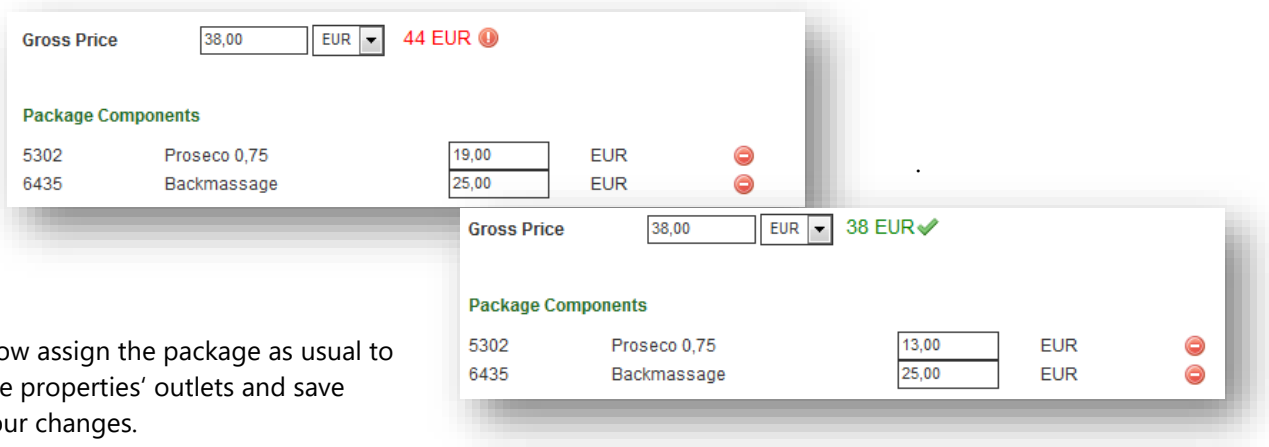


Reductions are only possible for the whole transaction, price changes may not be entered manually via touchscreen. This is due to the fact that an absolute reduction of the whole price cannot be converted for the package articles.

Choose items for your listed articles by entering the name or item ID. Confirm your choice by clicking on the symbol.

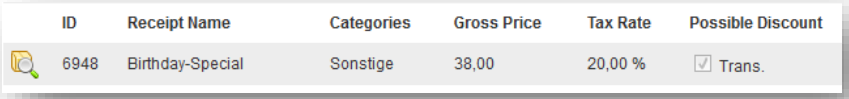


Add more items until you have completed your bundle. Now please correct the single item prices until they match the package price.



Now assign the package as usual to the properties' outlets and save your changes.

Packages are shown with a new symbol in the item list.



Sell a Package

In the Cash-Points Touchscreen you will find the package as an item, but when posting it, it will be divided in its parts and, if applicable, orders will be sent to the kitchen/ bar.

During the payment process, the bundle is mentioned on the receipt, but its parts are listed and the different VATs per article displayed.

To the PMS accounts the individual package components are sent. On the receipt, the package name with its items are shown.

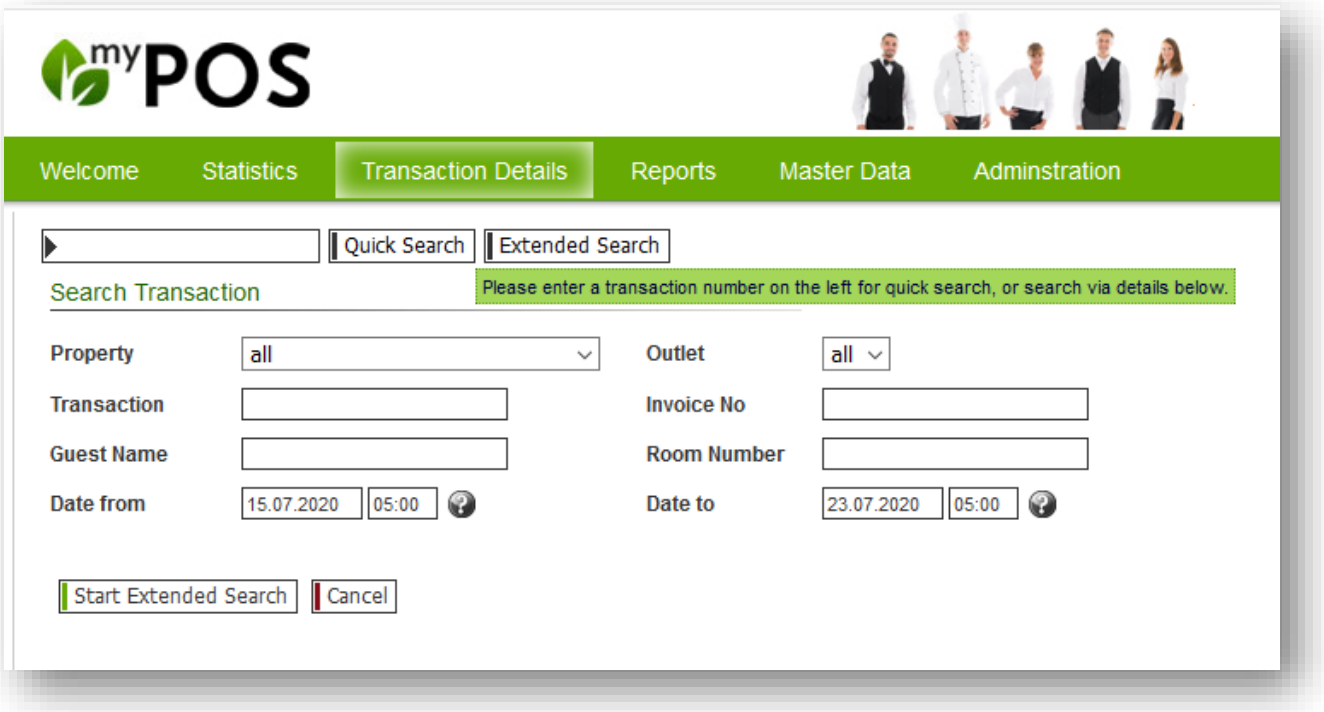
In the MY POS Administration statistics, bundle revenues are counted to the individual bundle items' categories. But in the transaction details you will see the package with its items:

7. Transaction Functions

All functions that are related to a specific transaction can be managed under the tab 'Operation data'.

7.1. Transaction Search

To search for a specific transaction, please enter the transaction number in the quick search field or search by other criteria:.



All related events and data are shown in the found transaction, in cases of fiscal connection also signatures and QR Codes.

7.2. Sales by room number

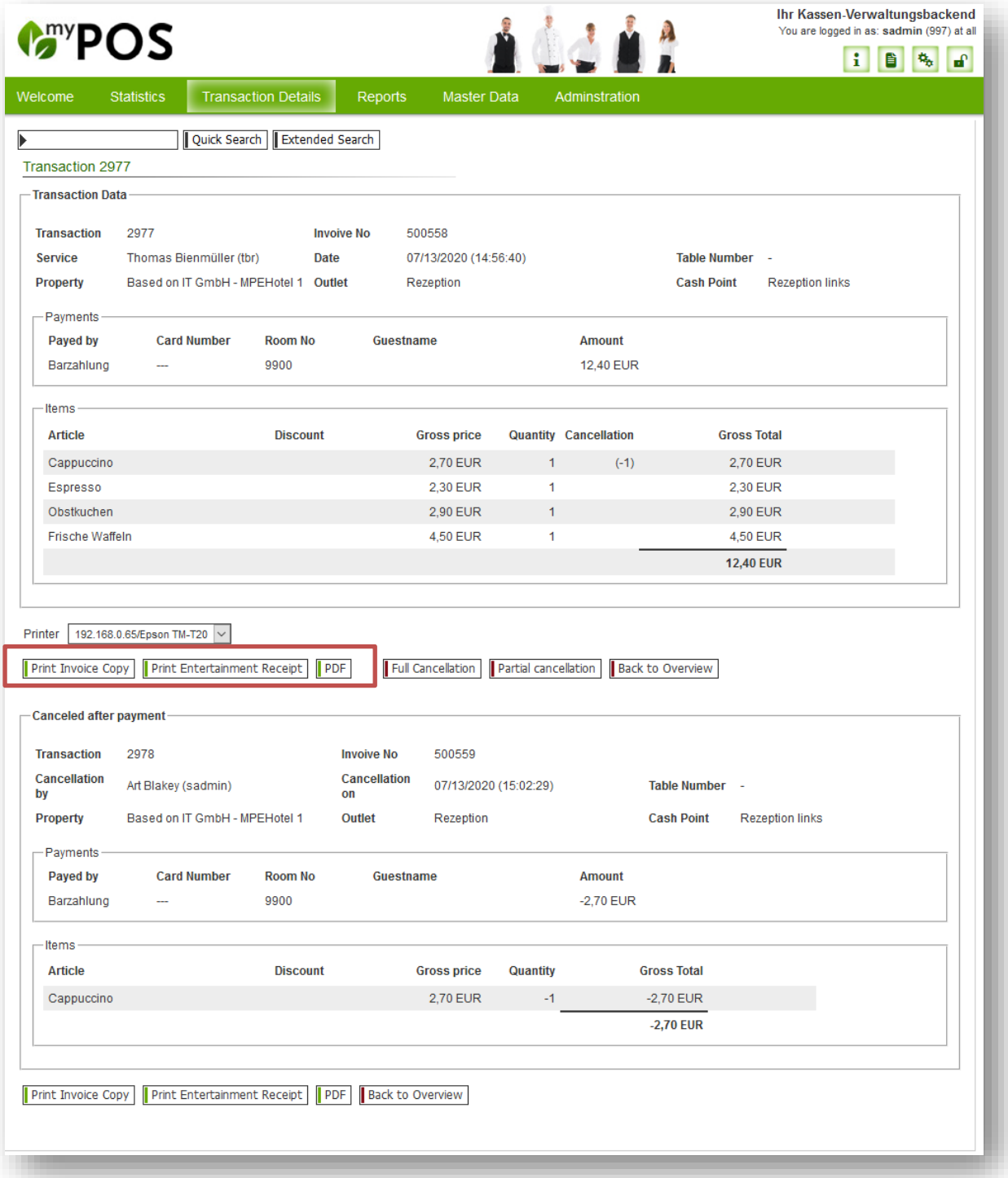
All transactions for a room number or, if you use unique guest cards or tapes, also these unique transponder IDs, can be displayed collectively on the Welcome page:

7.3. Printing a copy of the invoice & hospitality receipt

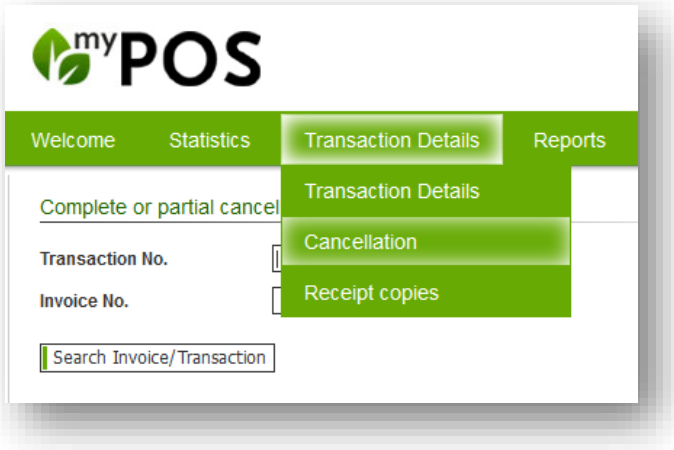
Please click on "Receipt Copies" and enter the corresponding receipt number. Then please click on "Search Invoice/ Transaction". If you know the transaction ID, you will find it by using the Quick Search.

You will now receive an overview with the details of the invoice/transaction you have selected. In addition to the invoice number, you will find the property, the point of sale, the date, the time and the employee name. The gross price, quantity and total gross amount are given for each item.

Choose a printer to either reprint the receipt or print a business receipt for entertainment expenses, or print all details as a PDF.



7.4. Cancellations

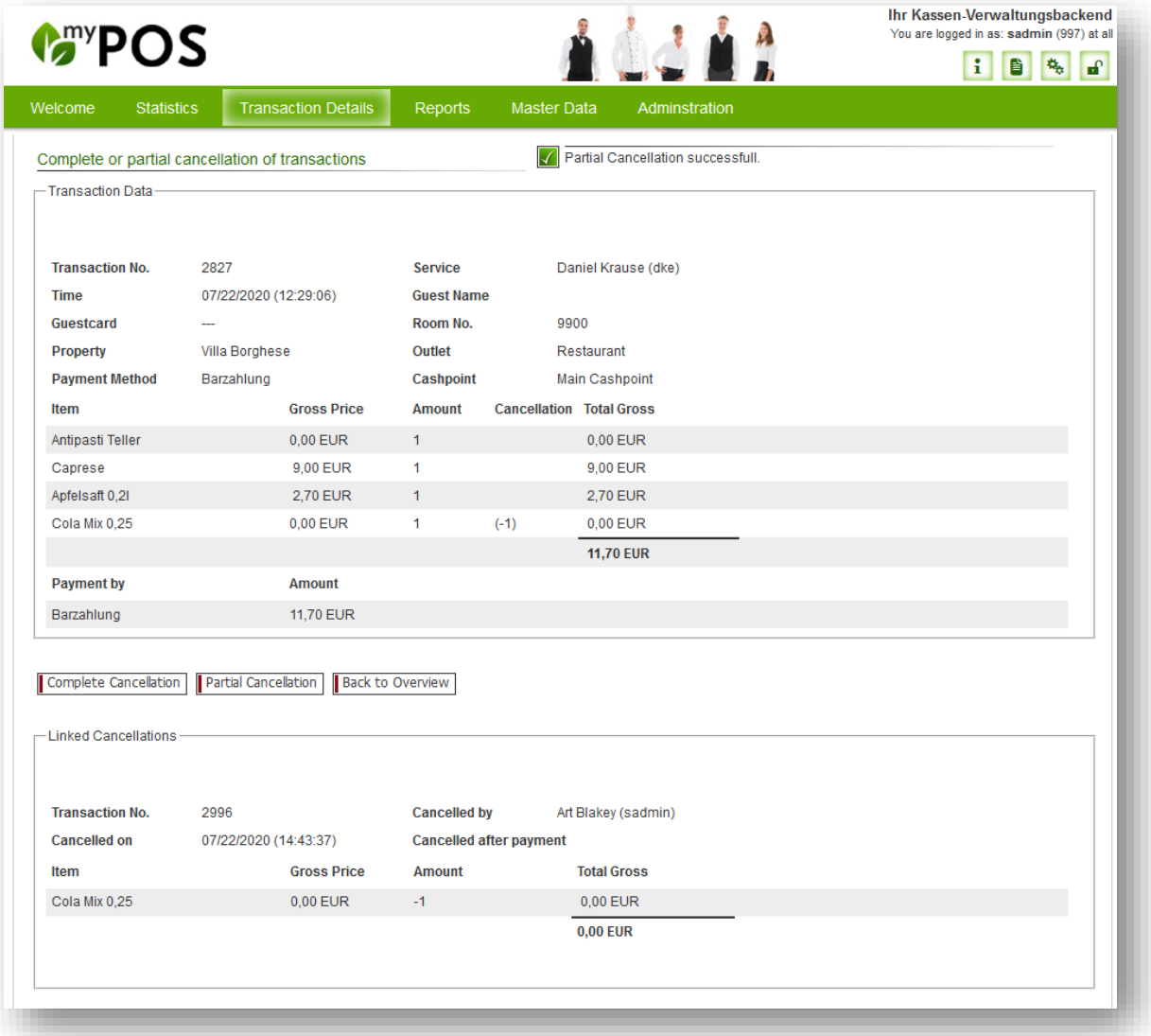


If too many articles have been booked in the daily business - be it due to incorrect entries or goods subject to complaint - the cancellation function can be used: select the menu item "Transaction Details" and search for the transaction or select the menu item "Cancellation" directly.

If the guest is still checked in, the transaction can be fully or partially cancelled when booking on the hotel bill. If the guest is no longer checked in, a note is displayed.

The transaction can be reversed at any time for external payment methods.

Unlike a complete cancellation, a partial cancellation allows you to decide how many items of each item are to be cancelled. Once you have entered the article numbers, please confirm your changes by clicking on "Submit Cancellation".



8. Daily Closings and Financial Reports

Do you want to issue daily closings, financial reports or exports according to financial regulations? Select the menu item "Reports".

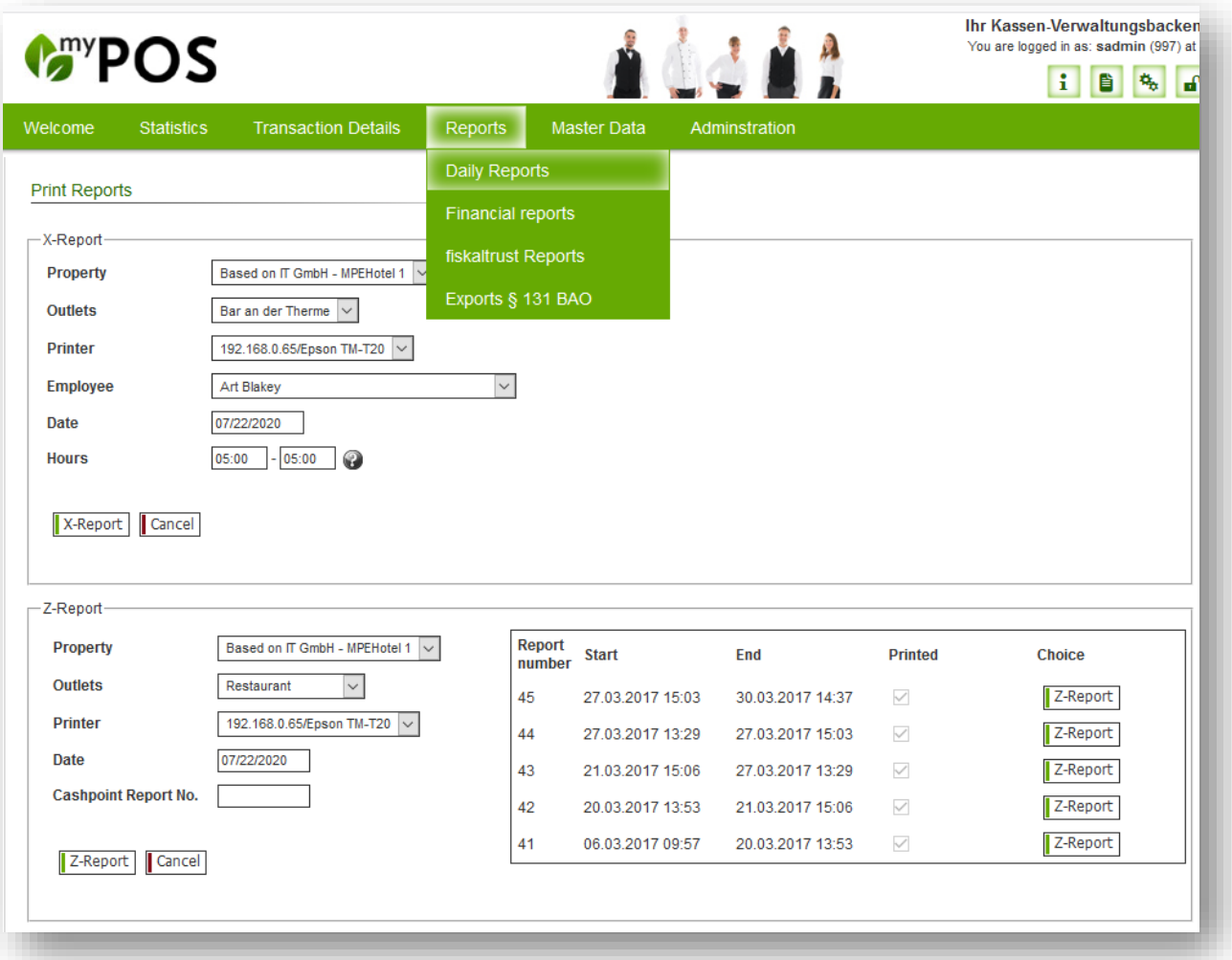
8.1. Daily Closing (Z-Report) and Service Report (X-Report)

To print the turnover of an employee for a specific day, please click on the tab "Reports" and then on " Daily Reports ". Now select the point of sale, the printer, the employee and the date and click on "X-Discount". However, in order to print discounts from other service staff, you must be logged in as admin.

You can also print the total sales for a day under "Z-Report" by selecting the point of sale and the date. Or search for the number of a specific Daily Closing Report and print it by clicking on "Z-Report".

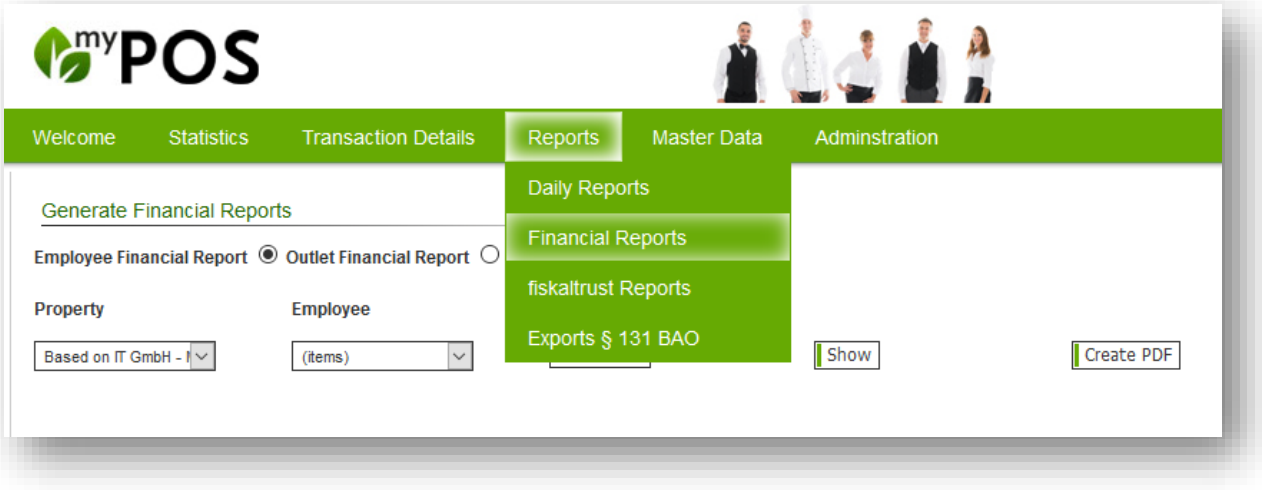
On the right you see an overview of the last 5 Daily Closing Reports and their print status (important if you have hidden the report buttons in the cashpoint view).

Click on "Cancel" to return to the overview.

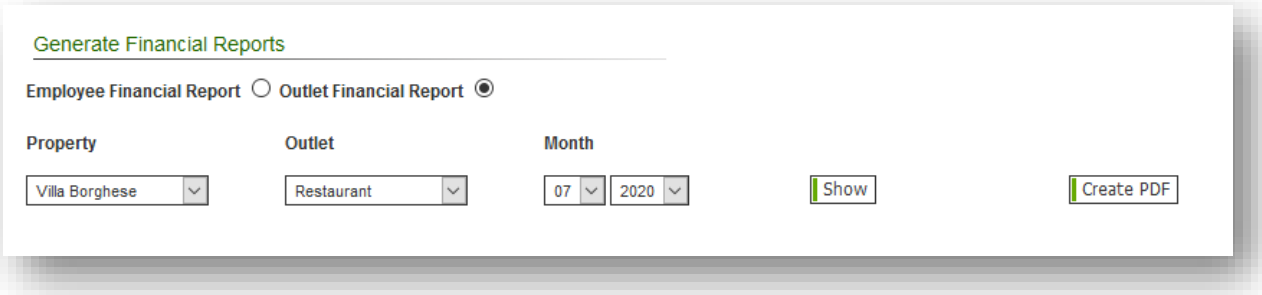


8.2. Employee and outlet reports

Under 'Financial Reports' select for the 'Employee Financial Report' the property, name and date and see the report or create a PDF that you may save or print.

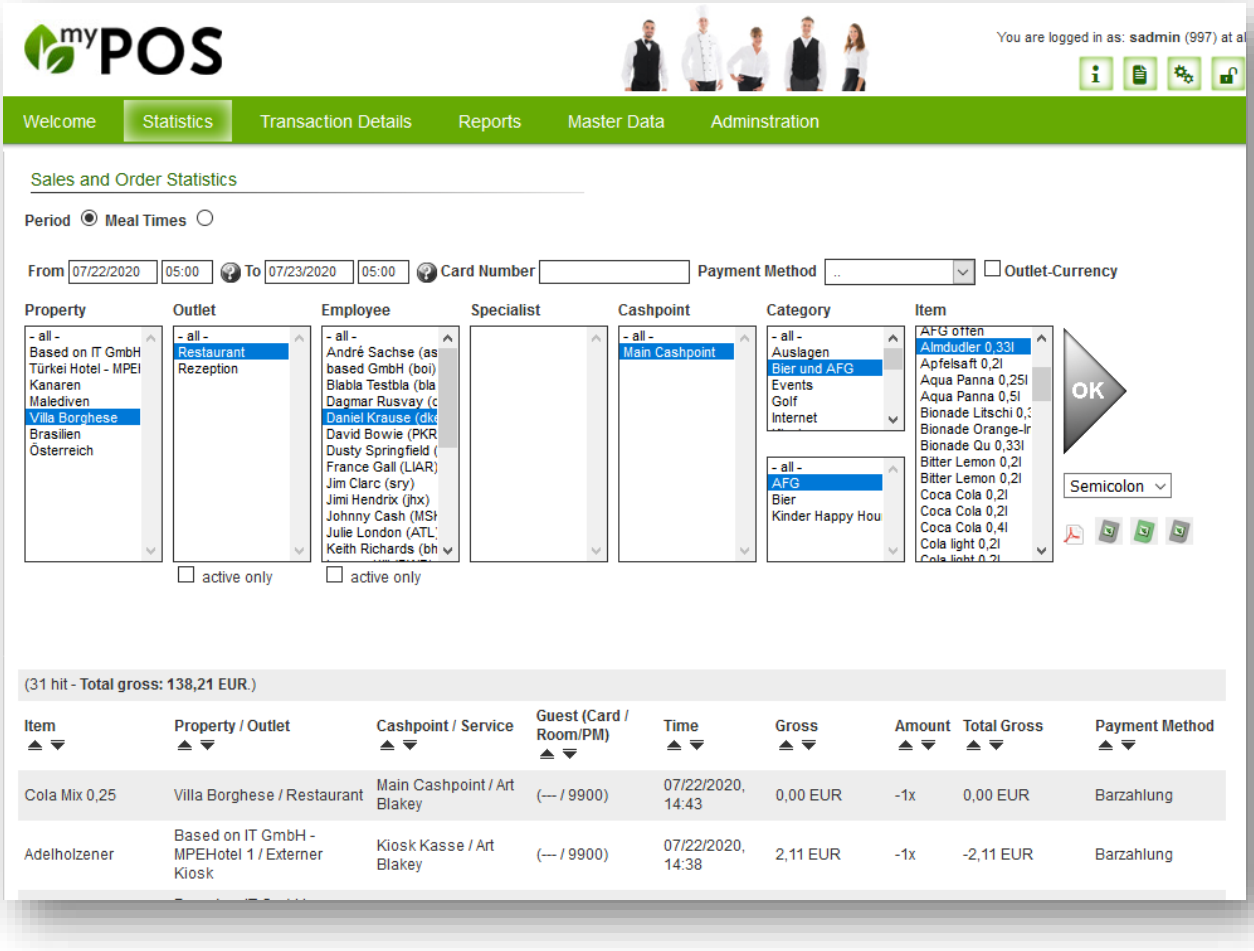


The 'Outlet Financial Report' refers to one month per outlet.



9. Statistics

Analyze your sales and create reports. The feature ‘Statistics’ offers a variety of filters.



With MY POS you may evaluate your revenue data by sell date, card number, payment method, staff, specialist (employees who have access to a SPA Outlet), outlet, cash point, category and subcategory, as well as by single items.

Furthermore, you can choose between displaying all the revenue in the default currency or if you want to see the different currencies of each outlet.

You can also limit your search by checking the ‘active only’ boxes, showing you only the revenue of active employees/outlets.

Choose and combine your desired filters, (choose more than one by holding Shift or CTRL).

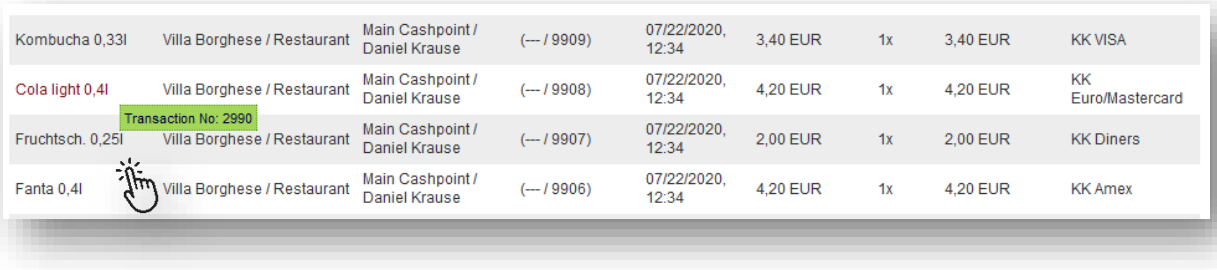
A click on ‘OK’ shows all matching data.

If orders are cancelled after posting, but before payment, you may track them: They are named ‘Cancelled Order’ and may be selected in the Payment Method options. Please note: ‘Cancelled Orders’ are not cancellations or partial cancellations of already paid transactions!

MY SPA transaction: In case the specialist differs from the cashpoint service employee, the specialist will be displayed in brackets after it. Also, all additional sales or tips from his or her transaction will also be assigned to the specialist.

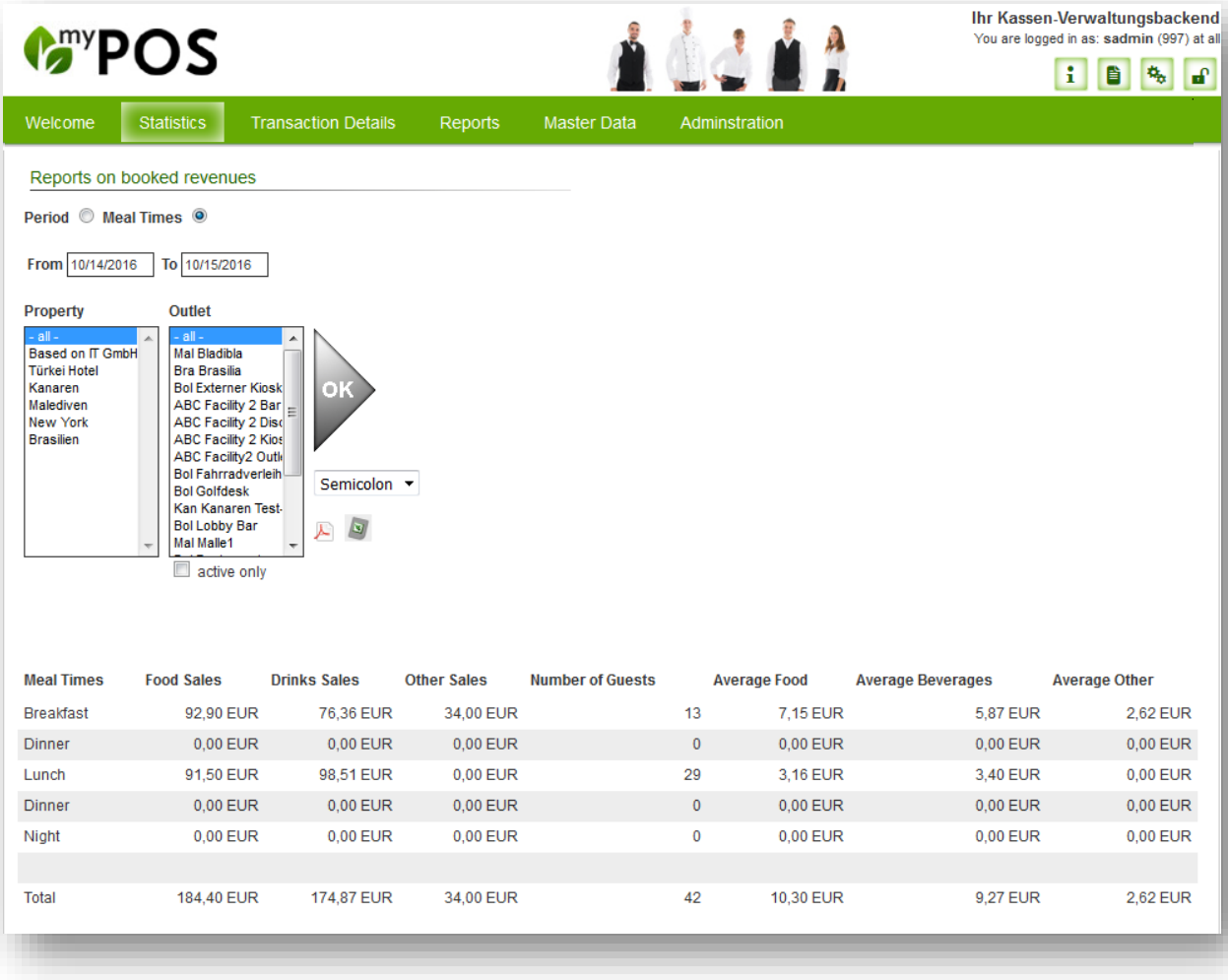
9.1. Jump to Transaction Detail

In the list of posted items, clicking on the item will take you to the corresponding transaction detail view, where you will find options for cancellation and printing, as described in point 6.



9.2. Meal Periods

There is another statistics report, which shows all your sales, divided by each property's meal times and item types. Choose 'Meal Times' instead of 'Period' and a new search engine opens. The default setting



limits the search to the current day, but you can select a bigger period of time or limit your selection to a specific property or outlets or choose to only view the sales of any active outlets.

The meal times refer to the time of booking, not the time of billing. Although, this report, only shows closed/settled transactions.

You can also see how many guests you had within each meal time (does not include MYSPA transactions or transactions made in the Express Cashpoint), as well as the average revenue per guest, per item type.

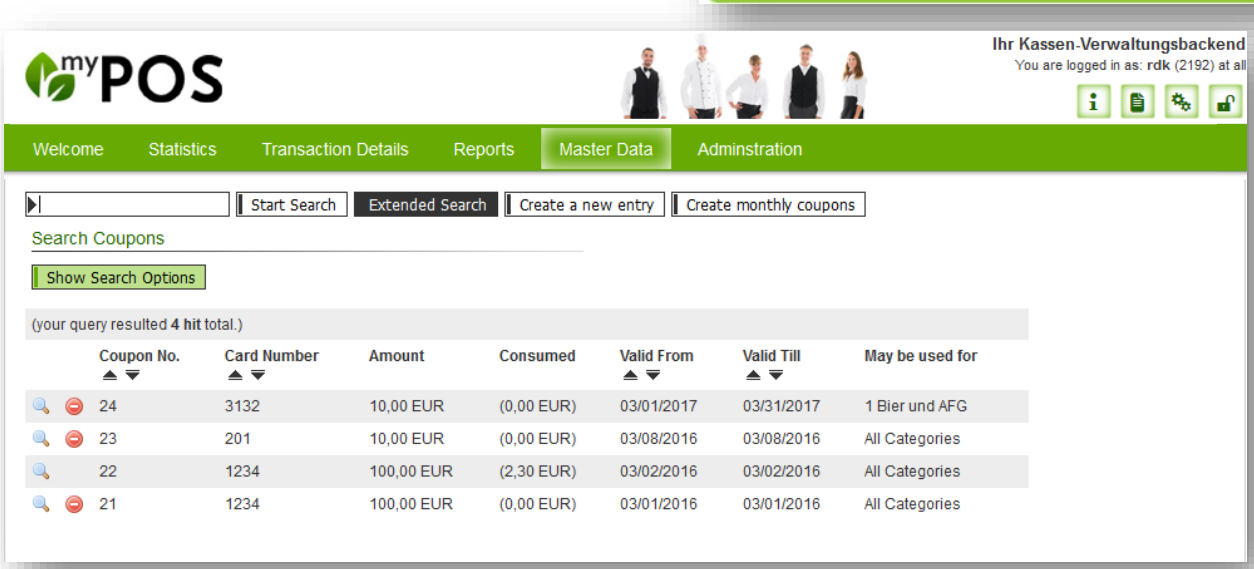
The report considers the time zone of each property and offers PDF and CSV exports:

This icon offers the download of the report as a summary per mealtime

The report icon with the + sign offers the report with all individual bookings.

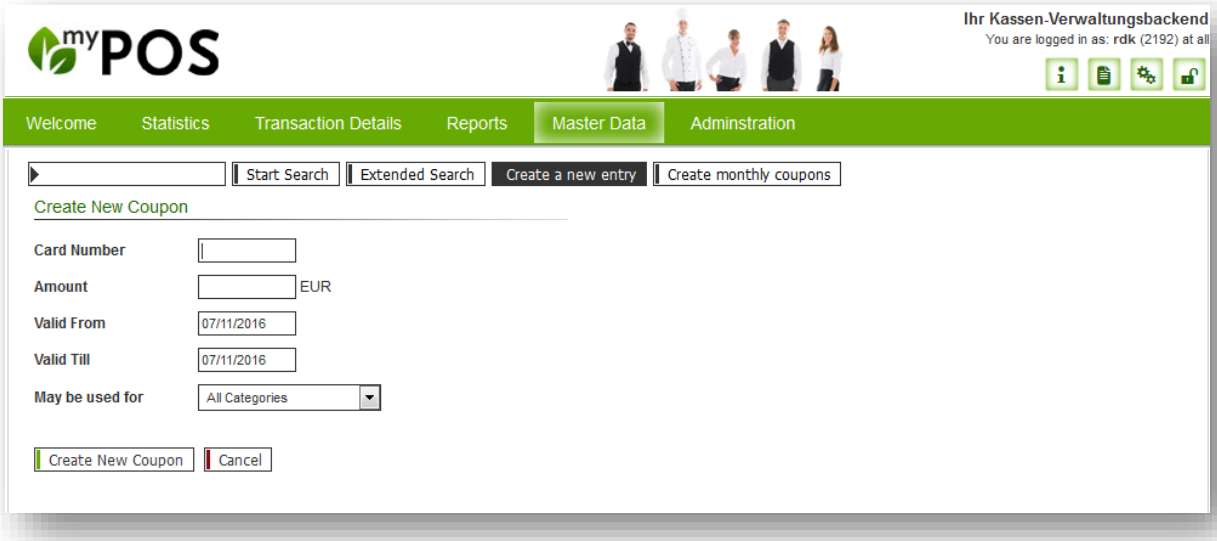
10. Vouchers

Choose 'Vouchers' on the Welcome page and you will find options for creating a monthly credit or a one-time voucher for guests and staff. Those vouchers are bound to either Transponder Cards or RFIDs.



10.1. Creating a One-Time Voucher

A one-time coupon can be created when you click on 'Create a new entry'.

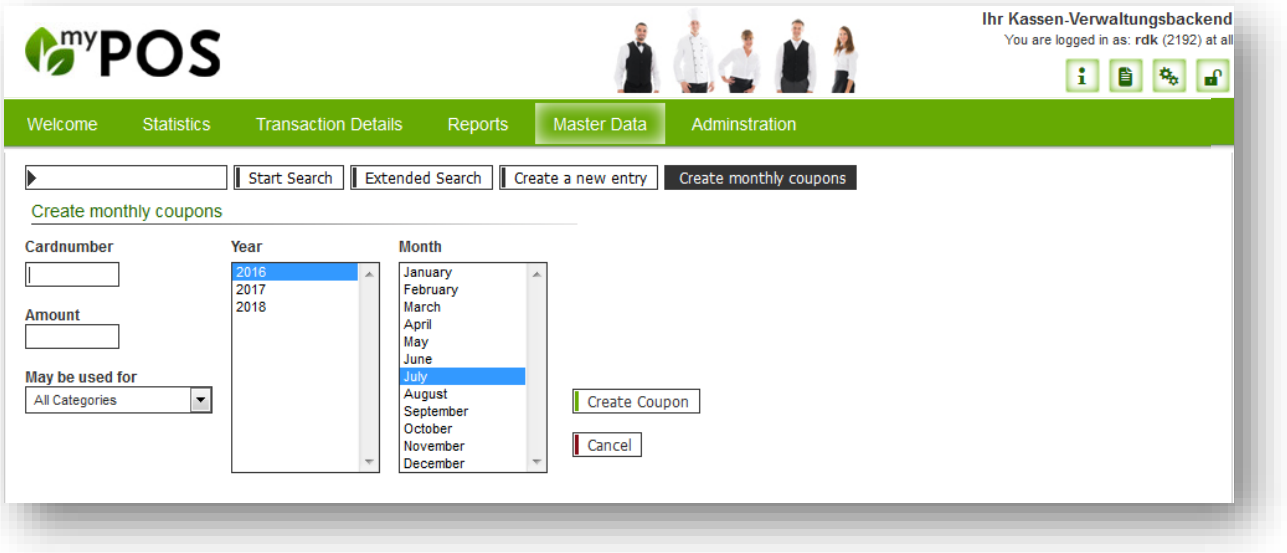


Enter all relevant information – the card number or transponder ID, validity and item category. Confirm your entries with a click on ‘Create Coupon’ to save the bonus entry.

10.2. Monthly Credit

A monthly credit offers a comfortable way to grant staff credits for free use of facilities within the resort. You can choose the amount of the credit as well as when and for how long it is to be granted. By entering a card number or transponder ID, you specify the monthly credit.

Now enter the monthly amount, purpose and outlet and decide how long it will be valid. Designate years or months valid (for more than one: hold down the CTRL key and click). Confirm the bonus by clicking on ‘Create Coupon’.



11. SPA-Cashpoint

11.1. Billing of Spa Sales with Connected Hotel System

If you do not want to check in day spa guests in your hotel system, or you wish to offer direct payment of Spa sales additionally to posting sales on the hotel bill, we offer the integration of MY POS. Payment methods created in the cash register are offered directly in the MY SPA user interface and billings are sent to connected POS printers, also with cash drawer opening.

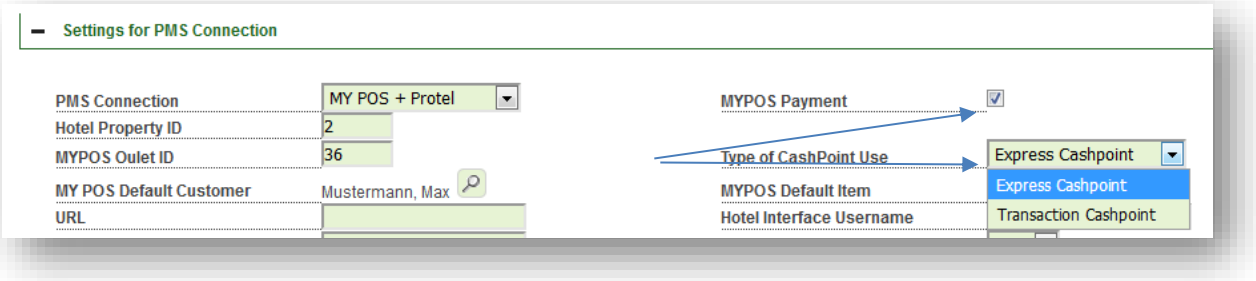
The advantage: the easy-to-use billing mask for booking sales to the hotel bill is maintained and supplemented by the selection of direct payment methods from the cash register. The cash desk interface is available in the browser window for billing advanced booking transactions such as split invoices, merge transactions or finance splitting with multiple payment methods. The MY POS administration backend offers article management, statistics and financial reporting.

For Austria, the mandatory connection to the tax authorities exists, for Germany it is implemented, it has been announced by the authorities for 2020. Italian fiscal printers can be used. The connection of the MY POS cash register to your hotel system can be solved via an additional POS interface, but you might as well use the cash-point system stand-alone.

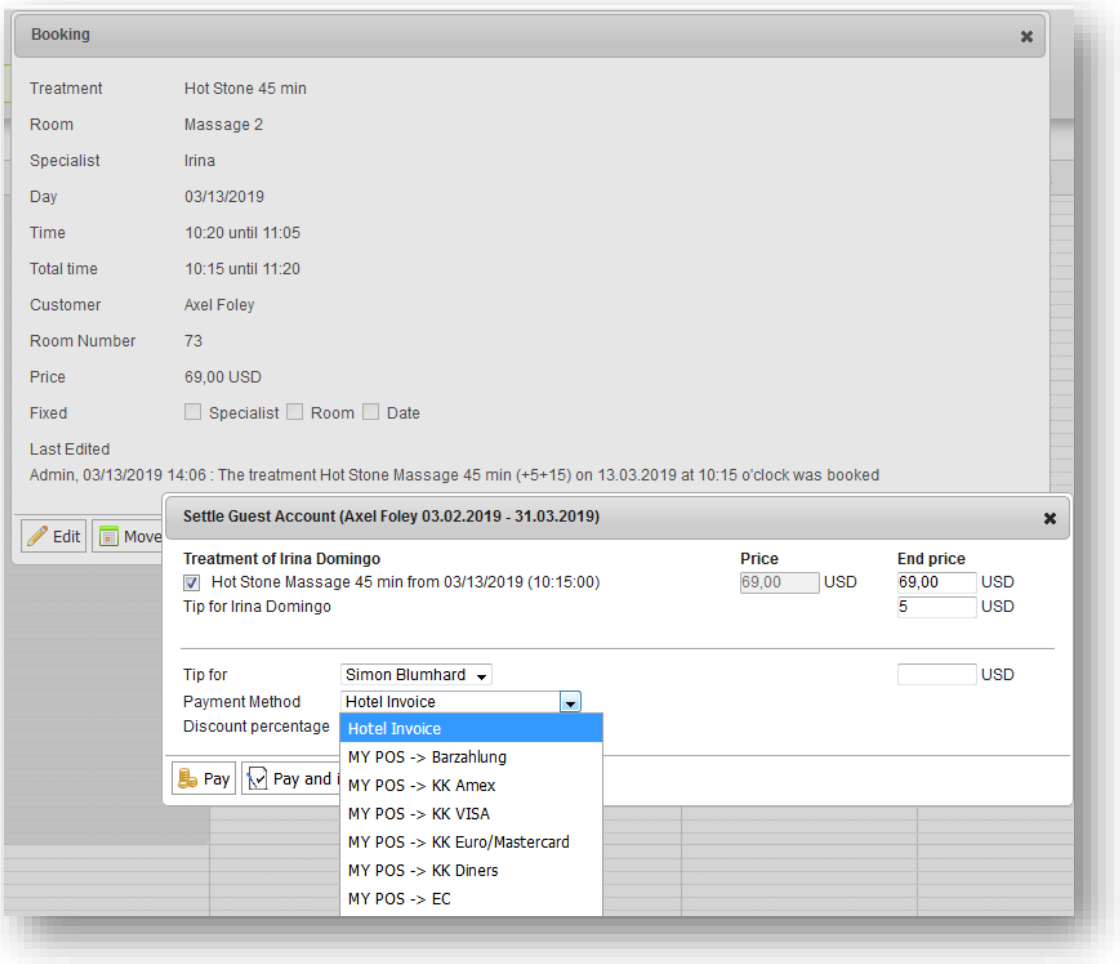
11.2. Day Spa Guests and Direct Payment: Settle MY SPA Services

In the Main Settings of your spa you may choose if you want to use MY POS as an express cash register with direct production of the guest's invoice, or if you would like to continue processing the billing as an open transaction in the cash point surface.

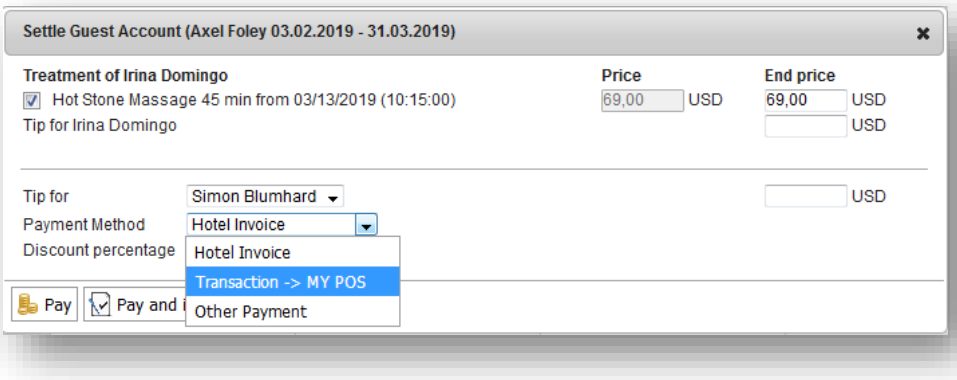
When selecting the setting 'Express Cashpoint, the payment methods set in the MY POS



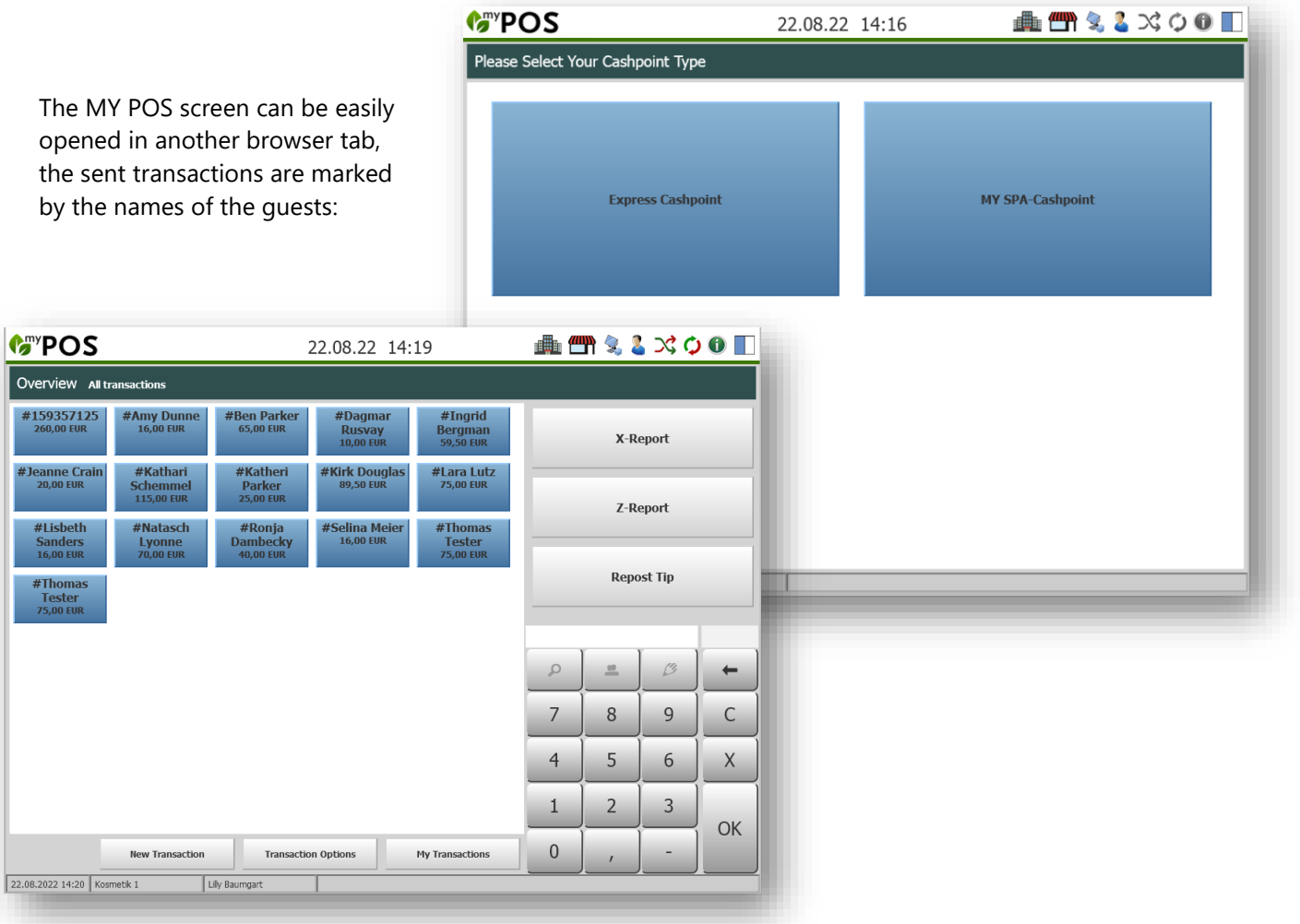
administration are offered in the selection of the payment methods that are possible for this guest. If he is checked in at the hotel, the payment method 'hotel bill' is pre-selected. If the guest is checked out, blocked our unknown in the hotel system, only the payment methods of the cash register are offered.



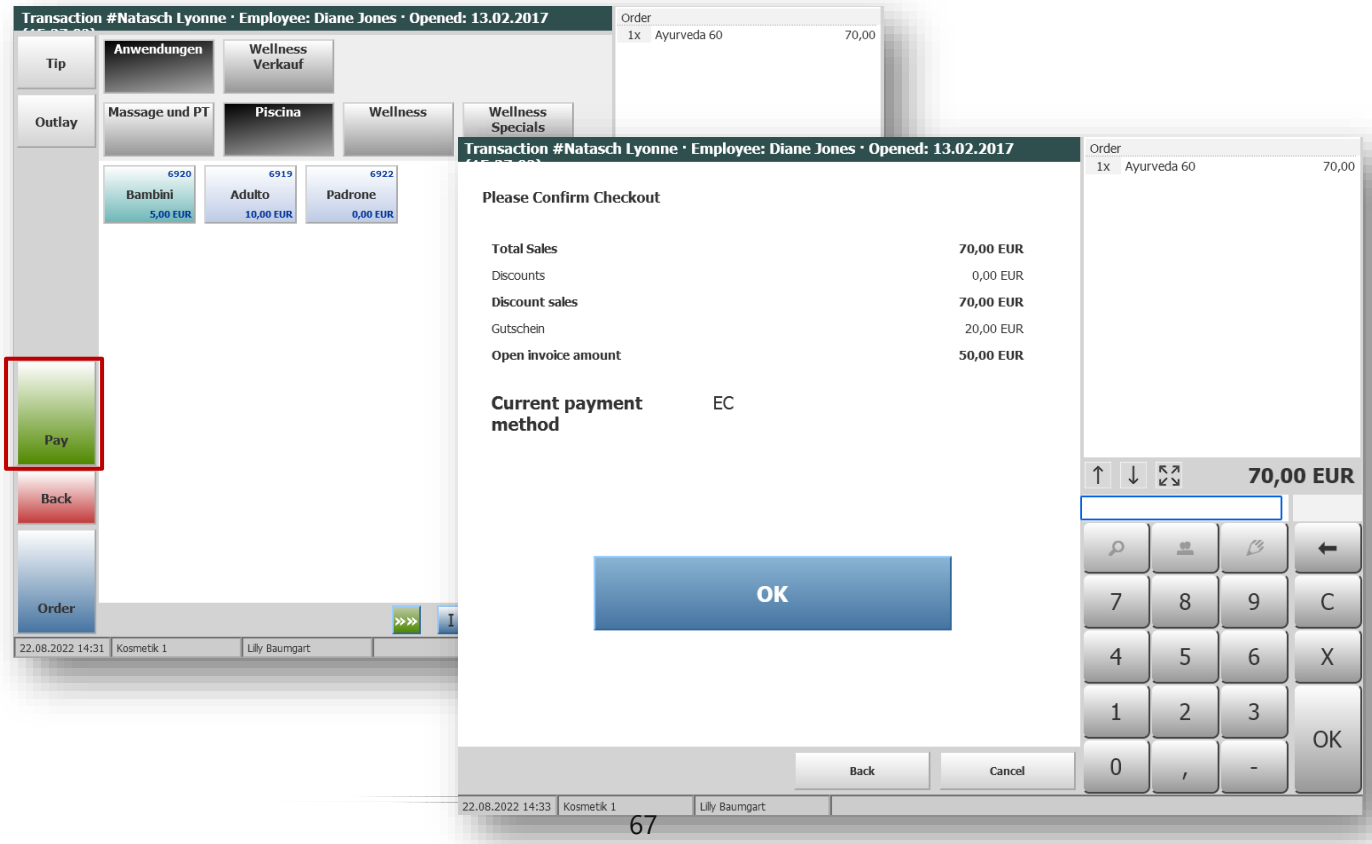
When choosing the setting 'Transaction Cashpoint', the payment methods in the MY SPA settlement screen are not selected directly. All sales are sent as one transaction to the MY POS cash-point surface for further processing, e.g. billing with multiple payment methods.



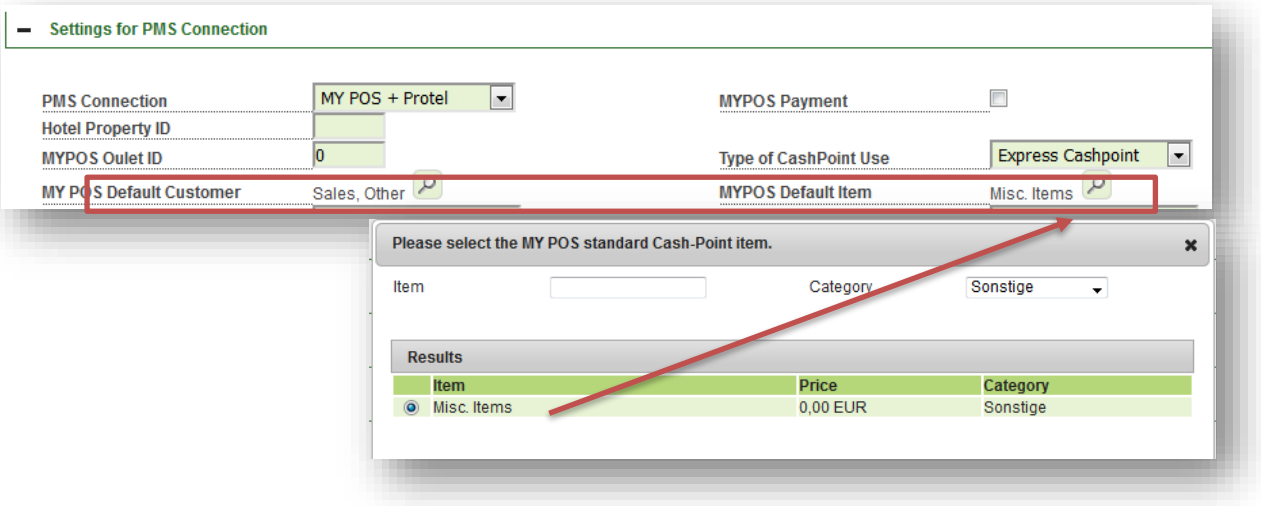
The MY POS screen can be easily opened in another browser tab, the sent transactions are marked by the names of the guests:



During the billing process, you can choose transaction management activities such as merging transactions, splitting transaction items, split bills, proportional payment or mixing different payment methods.

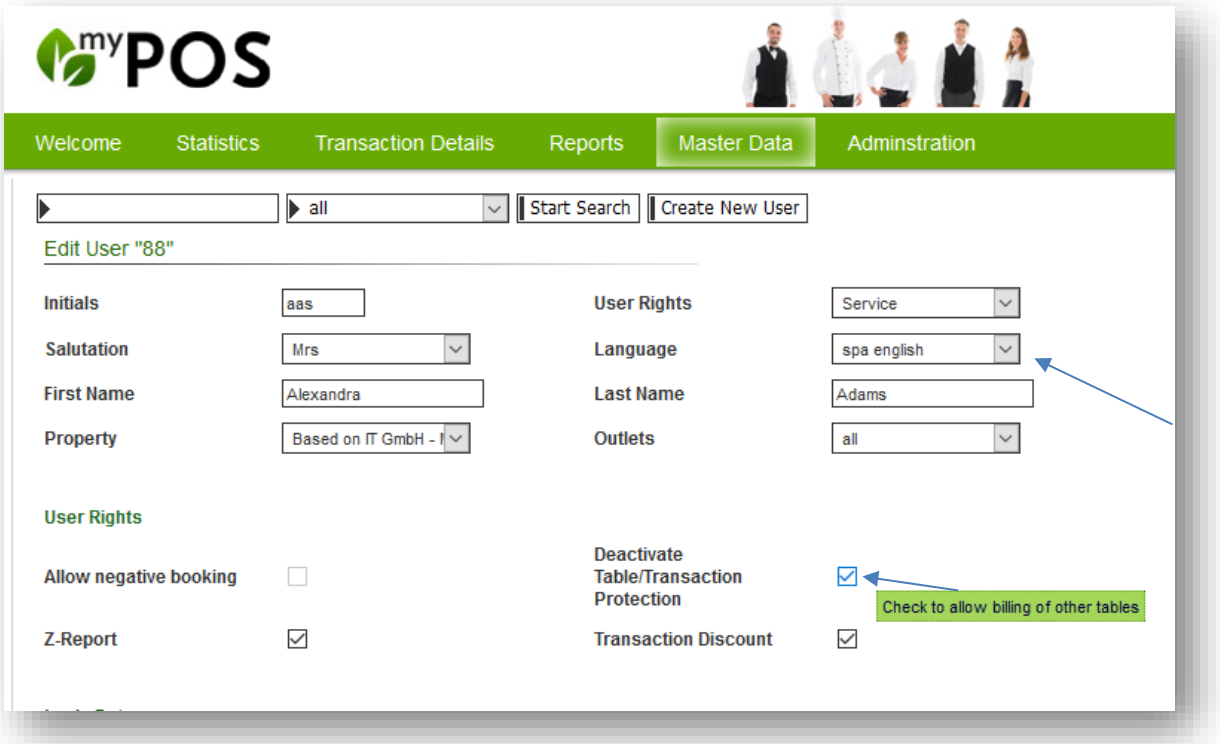


It is also possible to use the cash point surface for billing without first opening a transaction in MY SPA. Please note, that those sales are not shown individually the MY SPA reports and guest accounts. These 'other sales' are saved under collective terms in the statistics. Please create your own collective 'customer' and 'article' - name them as you wish - and select and save them in the spa shop data under PMS Settings.

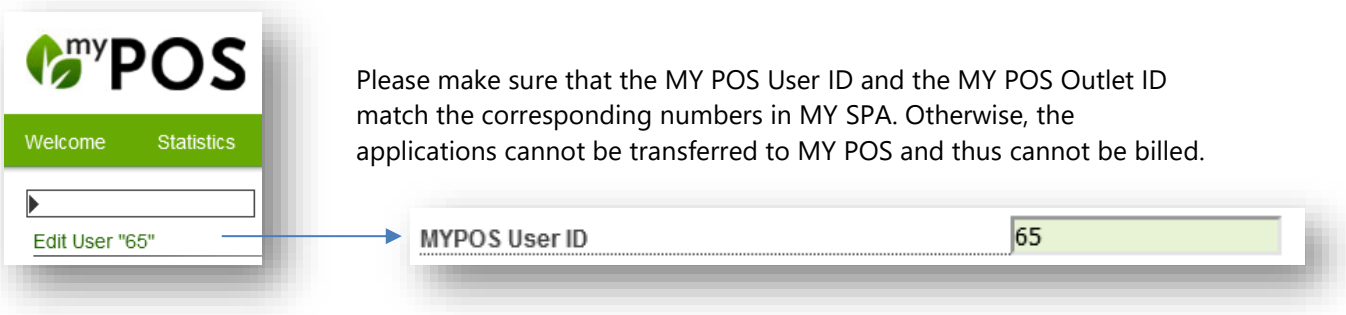


In order to prepare the functions for the Wellness Desk, please select the language setting 'spa english' for the wellness employees who are allowed to operate the spa cash register:

The setting 'Deactivate transaction protection' means that transactions created by colleagues do not



have to be transferred individually, but can be billed directly. Now enter the MY POS user number in the employee data in MY SPA:

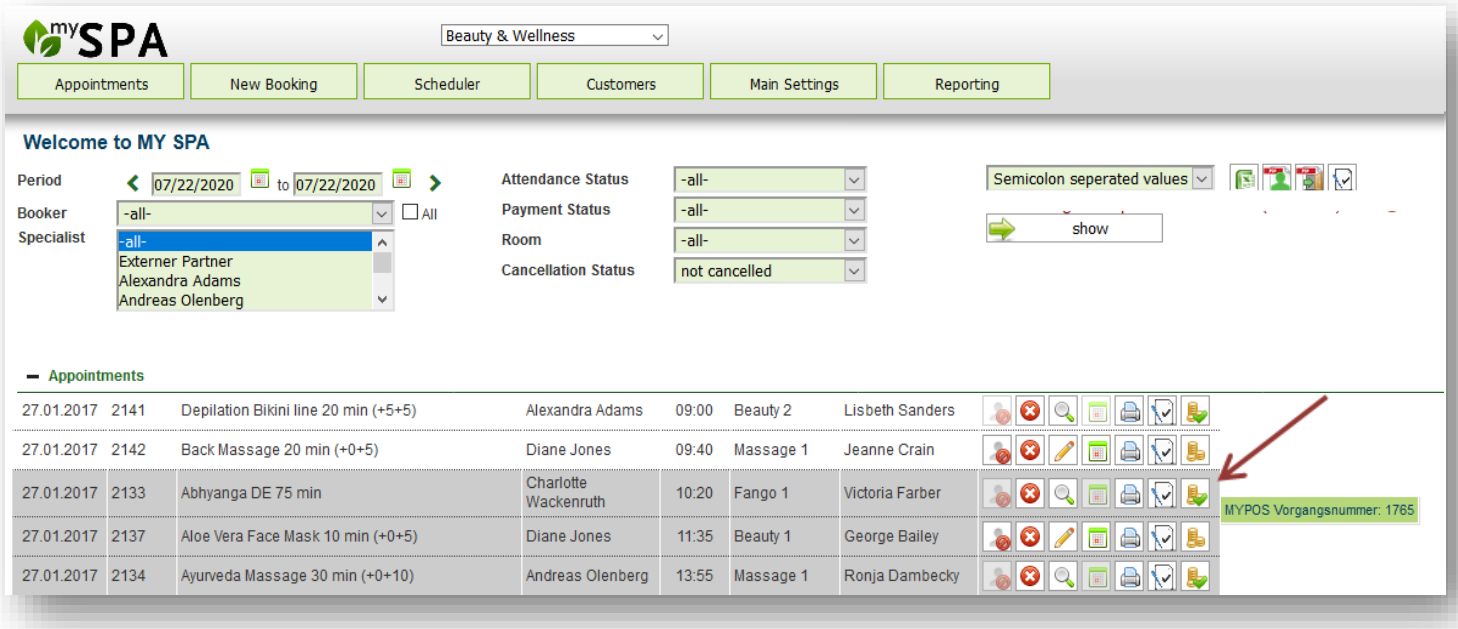


Please make sure that the MY POS User ID and the MY POS Outlet ID match the corresponding numbers in MY SPA. Otherwise, the applications cannot be transferred to MY POS and thus cannot be billed.

All treatments and items from MYSPA must also exist in MY POS and must have a unique article ID in order to be billed. By selecting MY SPA cash point, you can access the overview of your wellness treatments transferred from MY SPA to the cash point. If the transaction protection has been removed from your authorisation, you will see all open transactions directly. The billing of wellness treatments booked in MYPOS is similar to that of the restaurant till.

Here you can transfer transactions from colleagues or combine transactions and settle them as one transaction.

As soon as a spa treatment has been transferred to the cash point, the MY SPA POS transaction number is displayed.



11.3. Management of Day Spa Guest Revenues

Used as a transaction cash-point, MY POS can open a transaction of your Day Spa guests when entering, and name it according to a locker number, guest ID or RFID transponder ID. On this open transaction not only entrance fees are booked, but e.g. also consumptions which are ordered at bar and kitchen printers. Bookings from MY SPA can be sent to open transactions with reductions, additional product sales and gratuities – all assigned to the executing specialist. Are you interested in further information about the MY POS system for your hotel? Contact your MY SPA distributor or us directly.

12. Support

All MY POS Manuals can be found on the MY POS Administration: Click on the i-Icon in the right upper tab bar.

This software is constantly being improved. Learning from each other, we value your input and keep a close eye on new features and trends. So, we are excited to hear from you and incorporate your ideas into our products. Some ideas may be implemented immediately, some later. But with every fine-tuning, with every new feature, MY POS is evolving to better map your processes and meet your expectations.

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