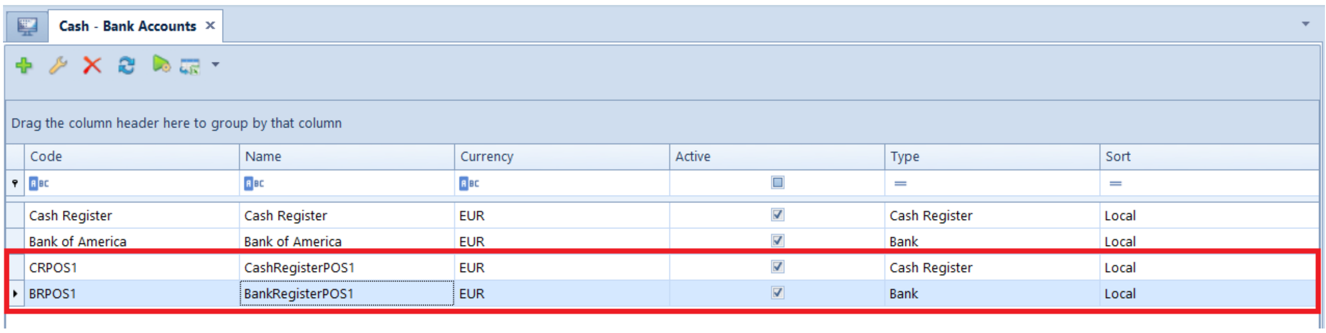
Adding new POS workstation

Necessary requirements

POS workstation is added in Comarch ERP Standard system, in POS workstation tab, which is available on the form of company or local center edition. Before adding a POS workstation, it is necessary to define objects, such us cash-bank accounts or numeration series which are necessary to be able to work with the application.

Cash-bank accounts

For the purpose of financial registration, it is required for each POS workstation to define separate cash-bank accounts. In order to do so, from the level of *Finances → C/B Accounts* it is necessary to add new cash and bank account with column *Sort* set to *Local.*

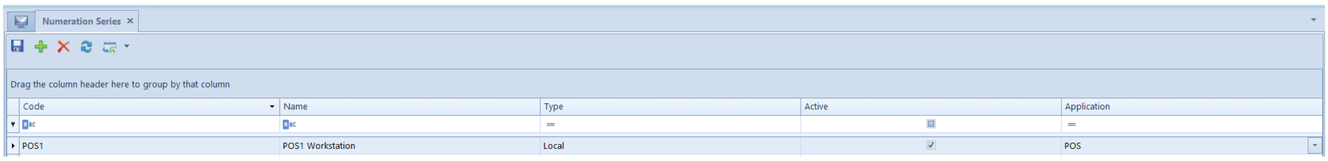


Example of cash-bank accounts for a POS workstation

Next, it is necessary to attach defined accounts to the center for which the POS workstation is being defined. It can be done from the level of *Objects Availability*, available after opening a selected center to editing. A separated cash/bank account must be defined for each POS workstation.

Series

A separate [series](#) for POS workstation must be defined in order to maintain unique numeration of documents in the system and to identify easily a point of sale at which a given document was issued. Series is added from the level of *Configuration → Series.* The same as in case of cash-bank accounts, a new series must have option *Local* set in *Type* column. Additionally, option *POS* must be selected in column *Application.*



Example of a series for a POS workstation

Also in this case, a series must be made available for the center for which the POS workstation for which the POS workstation is being created. It must be remembered that attached series must be edited in order to assign document types for which it will be available. If this operation is no performed, when saving a newly added POS workstation, the following message is displayed: *"NOTE! Not all the document types required at POS workstation have been assigned to selected series [series name]. It may not be possible to continue working at this point of sale. Would you like to assign those document types now?".* Upon selecting option [**Yes**], document types are assigned automatically by the system.

Warehouse for WM- documents

Creation of a POS workstation is only possible upon assigning a dedicated warehouse to it. The assignment can be done from the level of the *Objects Availability* for *Warehouses* object. Otherwise, when saving a newly created POS workstation, the following blocking message is displayed: *"Cannot save the POS workstation. A warehouse dedicated for center [center name] is missing. To save the POS workstation it is necessary to assign a warehouse to the center.*

To enable creating of new WM- documents on the POS workstation, it is necessary to assign the target warehouse to it. To do so, open tab *Warehouse -> Warehouses* and open selected warehouse for edition. Next, in *POS Target Warehouse (?)* tab, attach selected center to the list. If no warehouse is assigned to the center, the following message is displayed when saving a newly created POS workstation in it: *"NOTE! No target warehouse has been assigned to the WM- document. It will not be possible to create new WM- documents. Would you like to automatically assign all warehouses available for a given company?"* Upon selecting [**Yes**], the system will automatically assign all available warehouses.

A warehouse can be available for WM- documents only in one of the centers to which POS workstations are attached. From the level of the *Object Availability,* when trying to share WM- documents for a given warehouse in another center with POS workstation assigned, the following blocking message will be displayed: *"This warehouse will not be available/set as default in WM- document definition. The warehouse has already been assigned to WM- document definition in another center owing a POS workstation."*

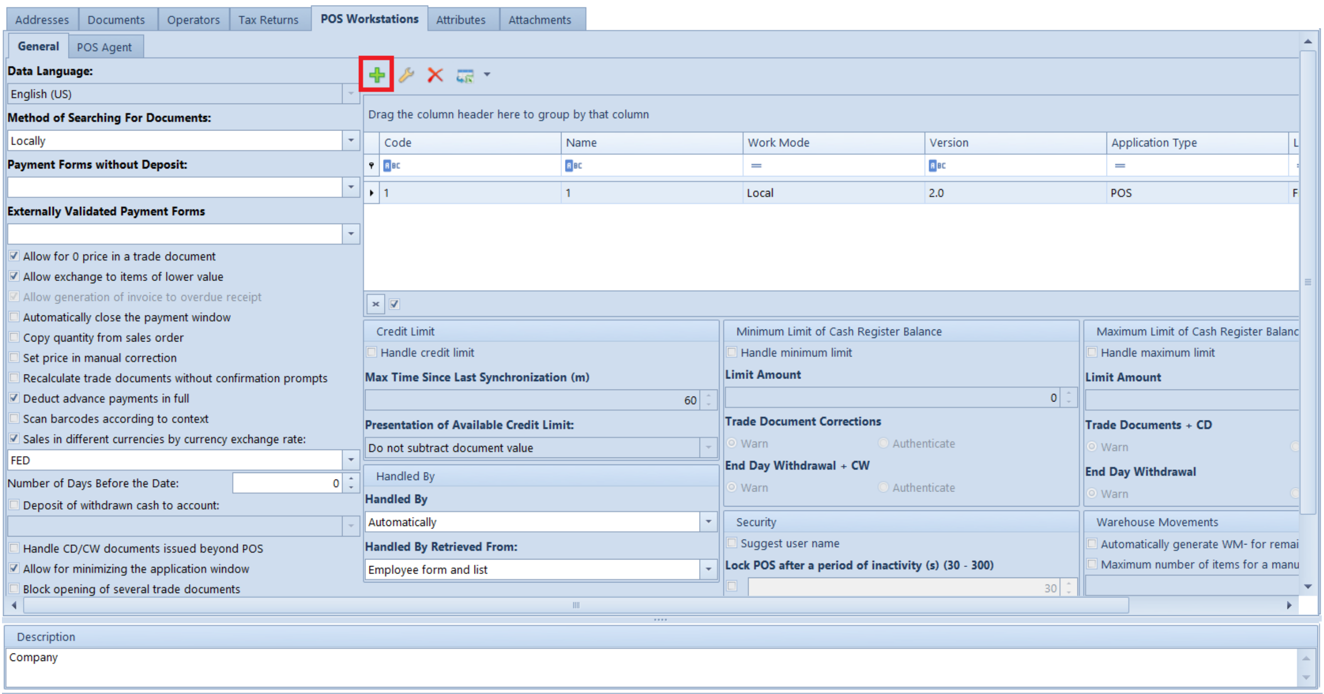
Adding POS workstation

Note

During the configuration of a POS workstation, it is necessary to complete *Data Language* field, in the tab *POS Workstations* on the definition of a specific center/company. After performing first synchronization of POS to Comarch ERP Standard, it will not be possible to change it.

The necessary condition for adding a POS workstation is enabling sales below stock levels. Parameter *Sell below stock levels* is available in the definition of a given center company (*Company Structure -> Rights Structure -> center/company edition*), from the level of which such sales model is to be enabled.

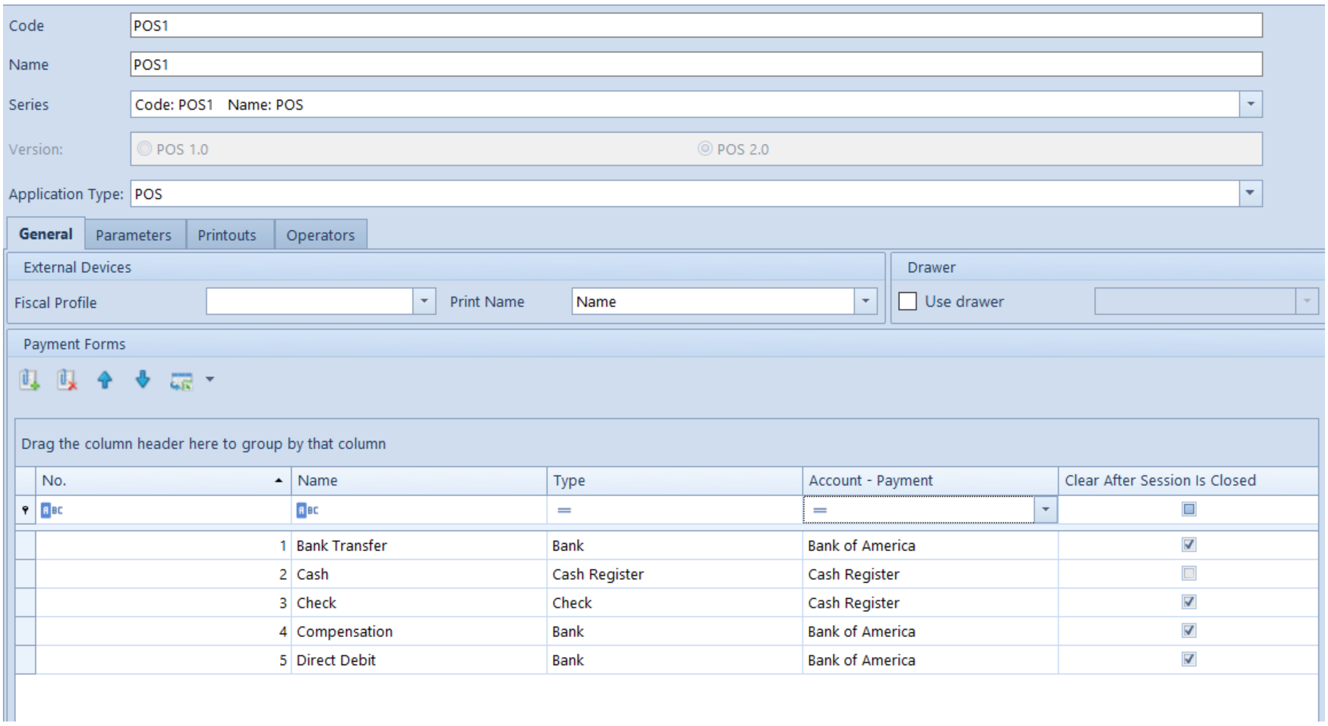
In the tab *POS Workstations,* on the edition form of a given center, there is a list of all POS workstations which are attached to that center. To add a POS workstation, click on [**Add**] button. The system will verify if the option of sales below stock levels was enabled in the configuration. If not, the following message is displayed: *"Sell below stock levels option has not been enabled for the center. Would you like to do it now?".* Next, the system checks if all defined numerators include Series segment which affects numbering of documents. If not, the following message is displayed: *"Either the numerators do not have a Series segment or this segment does not affect the numbering. Do you want to modify appropriate numerators for this workstation?".* Upon confirming, the system creates new numerators with *_R* suffix and assigns them automatically to appropriate document types.



Button for adding a POS workstation

Note
The icon of adding new workstation is unactive if no cash/bank

account and series are defined for a given center/company.



Window for adding new POS workstation

The following data must be specified in the window for adding POS workstation:

- **Code** – used for identifying a POS workstation, must be unique
- **Name** – name given to a POS workstation
- **Series** – used in the numerator of documents issued on a POS workstation. It clearly determines from which POS workstation documents originate

Note
When saving a POS workstation, the system verifies if the specified series has been assigned to appropriate document types. If not, the following message is displayed: *"NOTE! Not all the document types required at POS workstation have been assigned to selected series. It may not be possible to continue working at this point of sale. Would you like to assign those document types now?"*. Upon confirming, the system saves the POS workstation and automatically assigns series to document types handled on POS workstation.

Cash-bank accounts for payment form

In tab *General*, in *Payment Forms* section, from among all payment forms defined it the system those must remain which will be used on a POS workstation. Payment forms are detached/attached by selecting them on the list of available forms followed by clicking [**Detach**]/[**Attach**]. For the selected payment forms, cash-bank account must be chosen from the drop-down list contained in column *Account – Payment.* Selecting a check box in the column *Clear after session is closed* will reset the balance of cash register for a given payment form after ending a day. This option is not available for the cash payment form, whose ending balance equals to opening balance for the following day.
Button [**Export To Spreadsheet**] enables exporting the table with payment forms to a spreadsheet.

Note
Only one payment form of Cash and Own Voucher type can be attached to a POS workstation.

Operators for a POS workstation

In tab *Operators*, it is necessary assign appropriate groups of operators which should have access to the POS workstation.

DS synchronization service configuration

Operator to POS workstation

An operator, in order to be able to log in to a POS workstation, must fulfill the following criteria:

- Belong to a group of operators available in the *Operators,* in section *Groups.*
- Be of *Universal* or *External* type
- Be associated with an employee
- Have external password set

Note
A user, with the help of whom the data service connects to the database, must be able to log on to all POS workstations and belong to the group of Comarch ERP Standard administrators (by default, it is B2_admin group).

Note
For databases converted from versions previous to 2016.5.5, external password must be defined for an operator. To do so, go to Configuration → Company Structure → Operators, select a given operator and click [Change Password/PIN].

Note
In case more than one operator has the same employee assigned, when converting system to version 2016.5 or higher, such operators will have *Internal* type assigned and they will not be able to log in to the Comarch Retail POS application.

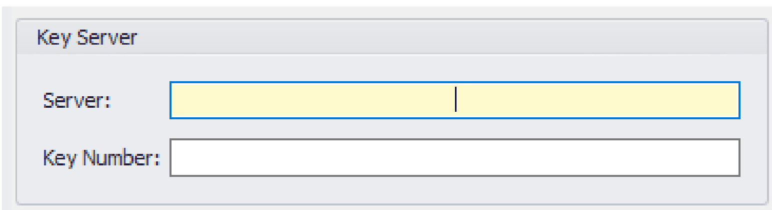
Service configuration

Comarch Retail POS Data Service is used for synchronizing data between databases of Comarch ERP Standard system and Comarch

Retail POS application. Moreover, through that service, it is possible to verify availability of items in other warehouses/other stores or pay with the use of vouchers.
Comarch Retail POS Data Service is configured with the use of Comarch ERP Standard configuration tool, which is started from the Windows start menu or directly in Comarch ERP Standard setup directory by *NewAltumConfigurator.exe* file.
Upon running Comarch ERP Standard configuration tool, the language selection window is displayed.

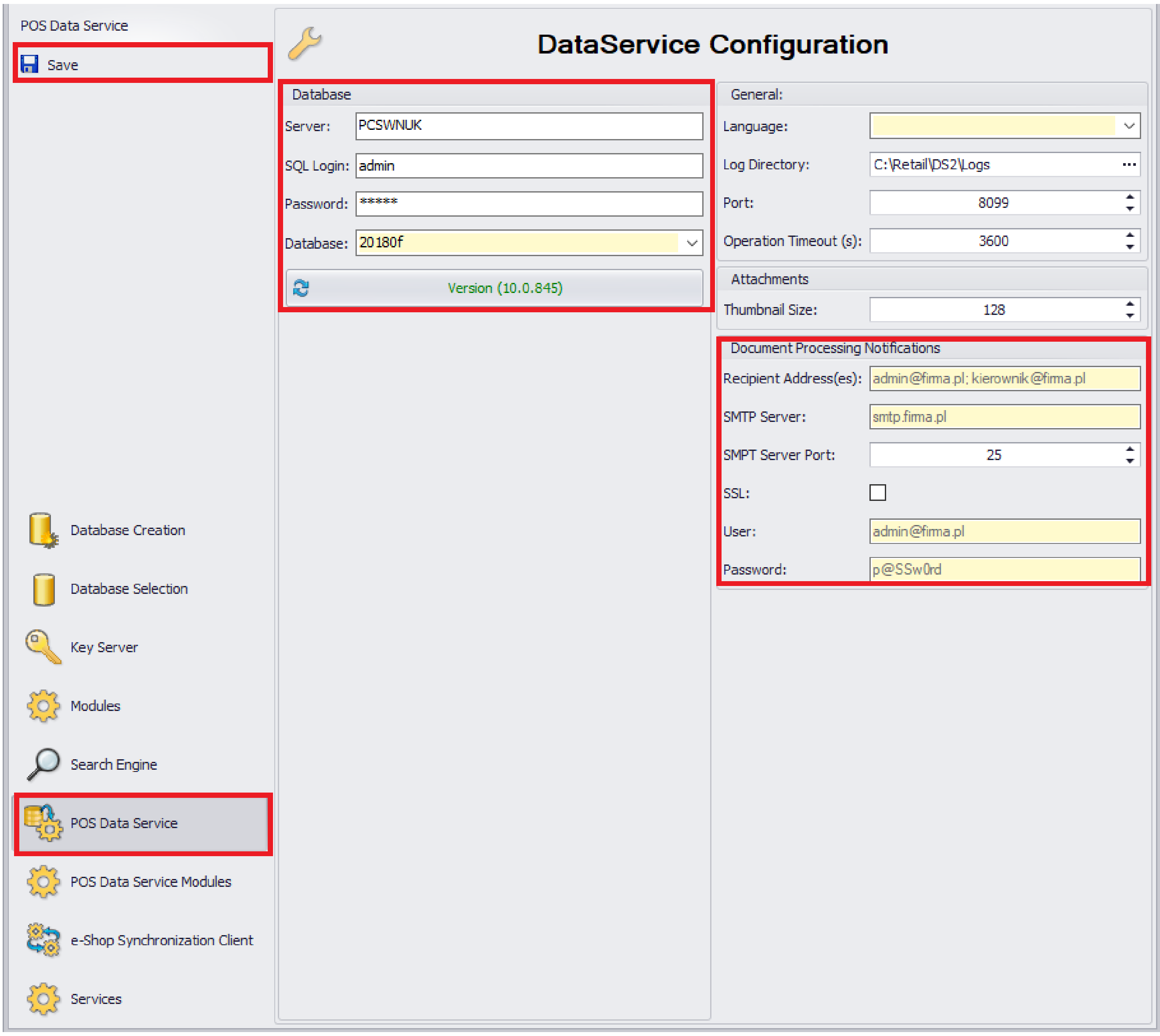
Language selection window

Upon selecting appropriate language version of the configuration tool, first go to tab Key Server in order to the server details, on which Comarch ERP Standard is installed and a license number.



Server Key tab

Next, go to tab *POS Data Service* in order to configure the service for POS.



POS Data Service tab

In *Database* section, it is necessary to specify:

- **Server** – name of SQL server or its IP, on which company database of Comarch ERP Standard system is stored
- **SQL Login** – login to SQL server having administrator permissions
- **Password**
- **Database** – Comarch ERP Standard company database

In section *General*, it is necessary to specify:

- **Language** – Comarch Retail POS Data Service culture language
- **Log Directory** – access path to directory in which

service logs will be saved

- **Port** – port on which the service is running and through which POS workstation connects to the data service. It must be noted that the port cannot be blocked, for instance, by Windows firewall
- **Operation Timeout (S)** – this parameter determines maximum time of the service operation. It is defined in seconds and its default value is set to 3600 seconds

In section *Attachments,* there is parameter

- **Thumbnail Size** – allows for setting height and width of image thumbnail in pixels.

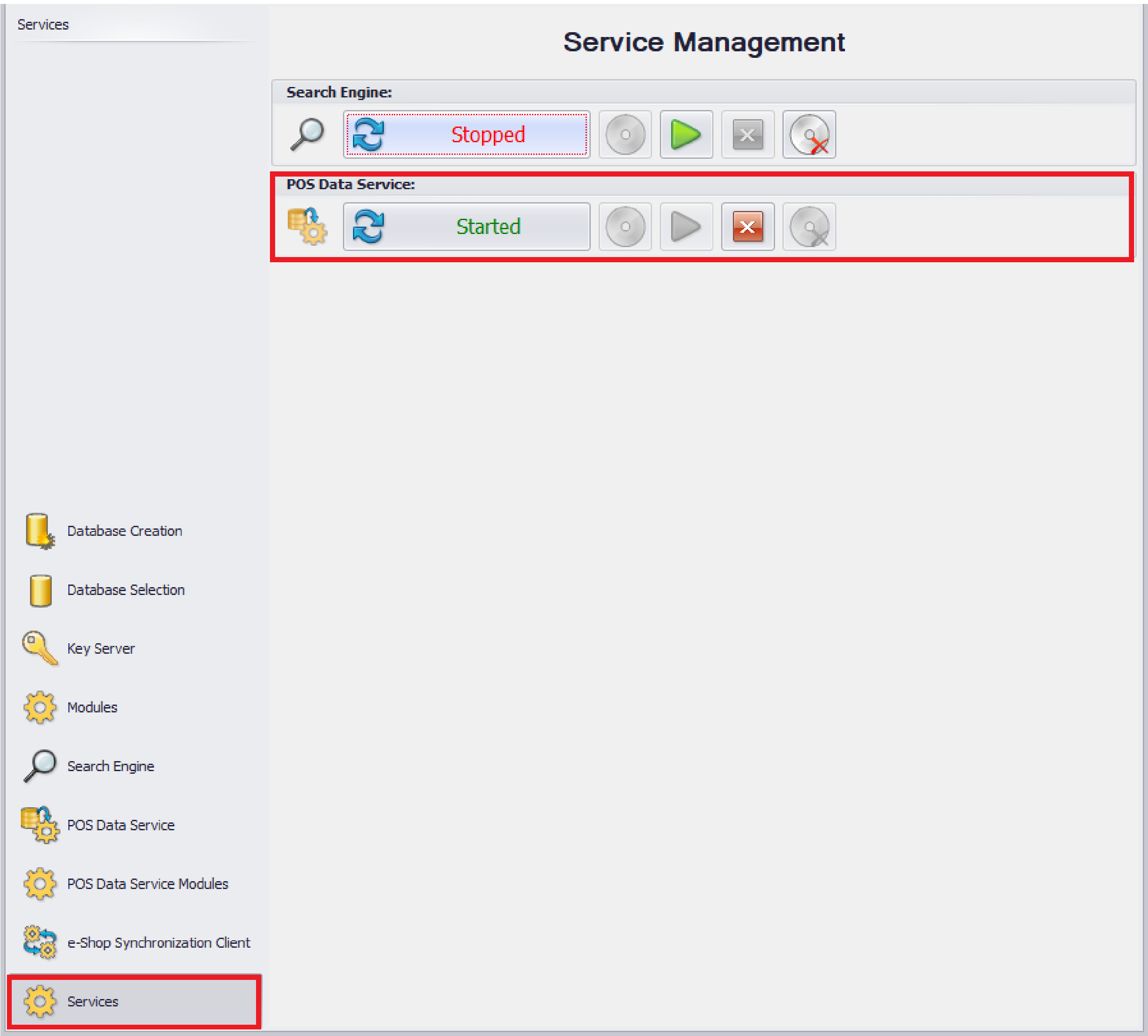
In section *Document Processing Notifications*, it is necessary to specify:

- **Recipient Address(es)** – mail address(es) of recipient(s), to which messages are to be sent
- **SMTP Server** – address of a mail server, to which the user logs in with a login and password
- **SMTP Server Port** – a number used by the outgoing mail server during communication
- **SSL** – communication is encrypted with the use of SSL certificates. This parameter is deselected by default
- **User** – mail address which will be used to send messages
- **Password** – password used to access relevant mail account

The functionality of document processing notification enables the user to receive e-mail messages about errors upon document synchronization.

After all the mandatory fields are filled in, configuration of the service must be saved. From the level of *Services* tab, it is possible to manage Comarch Retail POS Data Service, that is: refresh, install, run, stop or uninstall it. If any changes are made, it is necessary to restart the service.

Service synchronization logs are saved in C:\Retail\DS2\Logs path.



Tab Services

Items

Availability

Selecting [**Items**] tile in the main window or from a side menu displays the list of items defined in Comarch ERP Standard system which are shared for the structure center to which a given POS workstation is attached. The application synchronizes all item group classification categories that are active in Comarch ERP Standard system. The user can define new item classification groups in generic directory *General → Item Classification Categories.* A category can be made available in Comarch ERP Standard from the level of *Configuration → Company Structure → Object Availability*, after selecting an appropriate center and *Item Group* object.

Sets

Comarch ERP Retail handles items of the *Set* type in trade and warehouse documents. Sets are defined in ComArch ERP Standard system. Because of differences in handling, it is possible to specify two types of sets:

- Items of the *Set* type with the parameter *Retrieve elements onto document* selected
- Items of the *Set* type with the parameter *Retrieve elements onto document* deselected

Description of the above-mentioned items of *Set* type can be found in article *Item of Set type.*

Buy-back

This functionality allows a user to buy back items appropriately marked in the system.

The parameter *Handle buy-back* enabling this functionality in Comarch ERP Standard system is available in Comarch ERP Standard, from the level *System → Configuration → Trade*, in section *Items.* If this parameter is checked, the parameter *Buy-back* is available on item form, enabling the user to determine a given item as merchandise or service subject to buy-back.

An operator can confirm a sales document including items of *Buy-back* type only if possesses *Confirm buy-back* permission, which is granted in Comarch ERP Standard system, in tab *POS Permissions*, upon opening his/her group for edition.

Reverse charge

The reverse charge functionality allows the user to transfer the responsibility for paying a transaction tax from the vendor to the customer.

The *Handle reverse charge* parameter activating the functionality of reverse charge in Comarch ERP Standard system is available from the level of *System → Configuration → Trade*. Once it is selected, the *Reverse charge* parameter is displayed on the item and customer/vendor form.

Note
The parameter can no longer be deactivated once synchronization with Comarch Retail POS is performed.
In Comarch Retail POS, a VAT rate for an item subject to reverse charge is set according to the configuration of the parameter *VAT rate for reverse charge* available in Comarch ERP Standard system from the level of *Configuration → VAT Rates*.

Images

Item images presented in Comarch Retail POS are defined in *Attachment's* tab, available on item form. Defining of new attachments has been described in article <<*Defining new attachment*>>*.* An appropriate attachment must be <<assigned to an item>>. It is also necessary to specify the availability of the attachment, by checking *Retail* parameter on the list of attachments. To display one of the photos as a thumbnail, it is necessary to set the parameter in the *Retail* column as default for it. An attachment is set as default for an item by triple-clicking in the checkbox, which checks and frames the parameter.

Analytical group of items

<<Sales per item group>> is configured in Comarch ERP Standard system from the level of *Object Availability* à *Item Groups*. In order to present information for a given item group in a POS workstation summary which is created on a POS workstation, it is necessary to select a checkbox in a relevant row of the column *POS Analytical Group*.

POS Analytical Group column displayed for the object *Item Groups*

Editing item name on unconfirmed document

At POS workstations, it is possible to <<change the name of an item>> in unconfirmed R, SI, SO, and SQ documents, and in manual correction. If the parameter *Edit item name* has been selected on the form of a given item, the user may change the item name displayed in a document. To do so, it is necessary to check parameter *Edit item name* on the <<form of a given item>>.

A modified name is available only in a document in which it has been entered and documents generated from it later. For more information about editing item name in unconfirmed documents, refer to <<*Name edition*>> article.

Features

Items with a defined feature (affecting lots) are presented as separate list items for each lot.

<<Features are defined>> in Comarch ERP Standard, on item form, in *Parameters* tab. More information regarding selecting of item features on an issued document can be found in article <<Selecting lot features>>.

<<Text filter>> field available on the list of items allows for searching items basing on defined features.

Barcodes

Item barcodes which uniquely identify items and allow for scanning them with the use of SKANER?, are defined in Comarch ERP Standard system, on item form, in *Parameters* -> *Codes* tab.

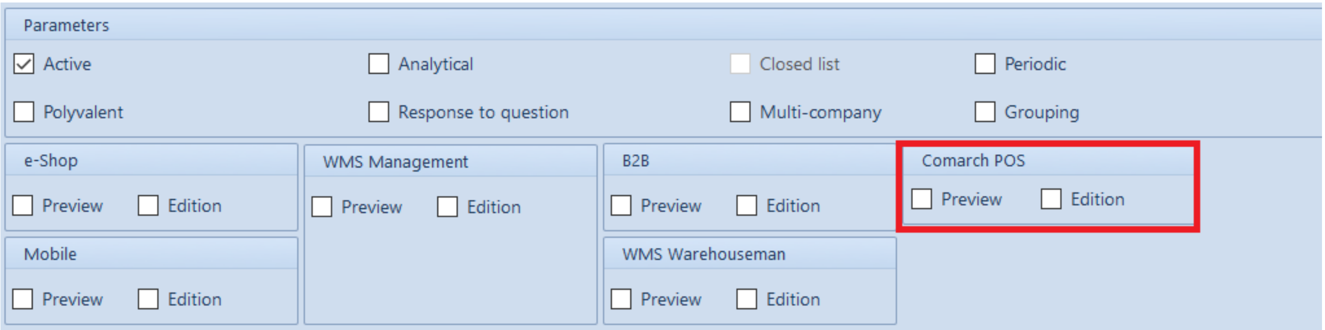
Related items

The functionality of related items allows for associating items which are often sold together. <<Associations between items are created>> in Comarch ERP Standard.

<<Related items>> are presented in Comarch Retail POS for a selected item of a document being issued, in the workspace on the right side of the window. This section will not be displayed if a selected item does not have related items defined.

Attributes

Attributes are used for collecting additional information about the following objects existing in Comarch Retail POS application: customer, item, trade document, correction, complaint, CD/CW.
An attribute will be available for previewing/editing on a POS workstation if parameter *Preview/Edition* is checked in the attribute definition in section *Retail POS* from the level of *Configuration → Attributes* in Comarch ERP Standard system. Checking parameter *Edition* automatically checks the *Preview* option.



Area Comarch POS on the form of attribute

Highlighted Retail POS section in the form for adding/editing attribute

The following types of attributes are handles on POS workstation:

- Text
- Number
- List
- Date
- Logic Value
- Directory

Note
By default, attributes are not shown in customer form. In order to display them, relevant view must be modified.

Modification of a view is described in category *Layout management*.

Note
Polyvalent attributes are not handled at POS workstations.
Document attributes

From the level of trade or complaint document views, there is a field available which presents attributes assigned to a document type. Attributes with checked option *Retail POS – Preview* will be displayed in the application without the possibility to edit their value, whereas value of those with option *Retail POS – Preview and Edition* will be editable. Values of attributes synchronized to Comarch ERP Standard system are visible when previewing a given document.
Comarch Retail POS application is equipped with functionality of transferring values of attributes from customer form onto a document or from item form onto a document item. In case of transferring attributes from customer form onto a document, it is necessary to attach the same attributes both to the customer form and the document. Value specified for an attribute on customer form is rewritten when that customer is selected in a document. In case a user has previously specified values of those attributes in a document, then changes the customer and updates that data, the values of shared attributes will change to values specified in the customer form. Other values of document attributes will not be changed.

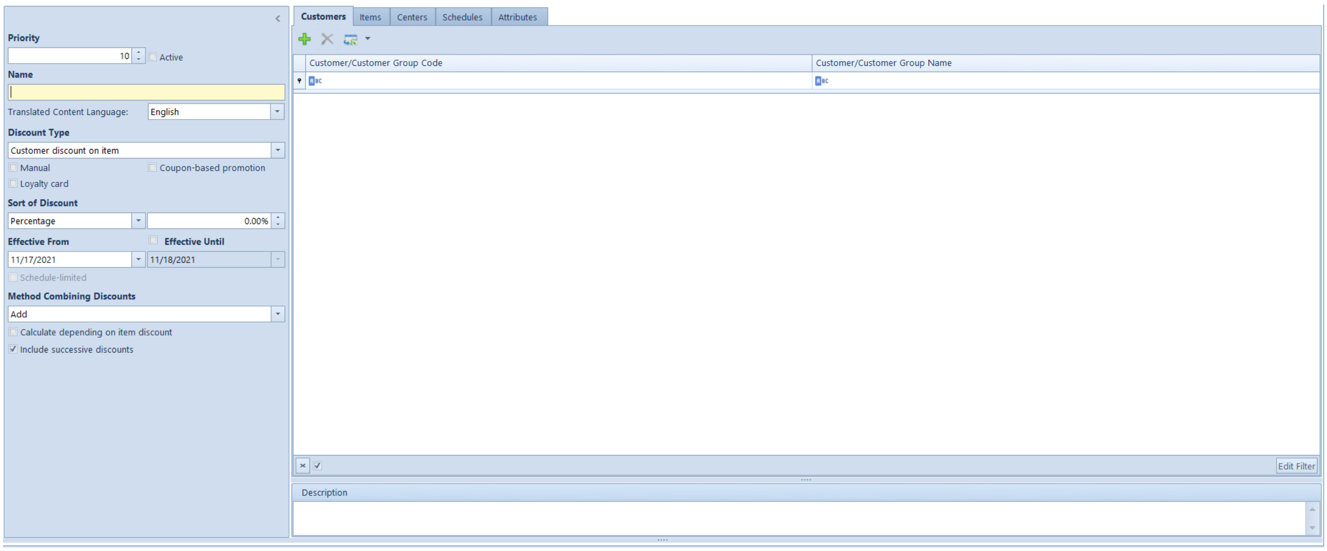
Transferring of attributes from an item form onto a document item is performed the same way. The condition which must be fulfilled is that the same attributes along with their values specified are attached both to item form and document item. Transferring of values takes place while an item is added onto a document. However, values of attributes transferred from item are not editable.

The functionality of transferring attributes is also available when generating invoices from receipts and creating corrections to receipts and invoices. Values of attributes are transferred from a source document and its items into a generated document and its items only for attributes attached to both type of documents or document items. Attribute values transferred onto target document are not editable.

In case of attributes with checked option *Required*, it is not be possible to confirm a document without specifying values for them. Then, the following message is displayed: *"Fill in field [attribute_name]"*. When modifying layout of a view, it is possible to determine a given attribute as required.

Discounts

The list of discounts handled in Comarch POS is available in article *Discounts*. Discounts are defined in Comarch ERP Standard.
Rules and order of discount calculation are described in article *Discounts – General information*.
To define a new discount, it is neccessary to select in Comarch ERP Standard *Sales* → *Discounts* and add new discount. In *Discount Type* field, te user selects one of discount types available in the system, depending on the type of defined promotion.



Defining new discount in Comarch ERP Standard

The method of calculating bundle promotions is determined by parameters in definitions of the following document types: Receipt (R), Sales Invoice (SI), Sales Quote (SQ) and Sales Order (SO). To change the value of parameter *Handle bundle promotions*, edit a given center, select R, SI, SQ or SO document type in tab *Documents* and then, choose one of the following value for the parameter in section *Document Parameters* of a given definition:

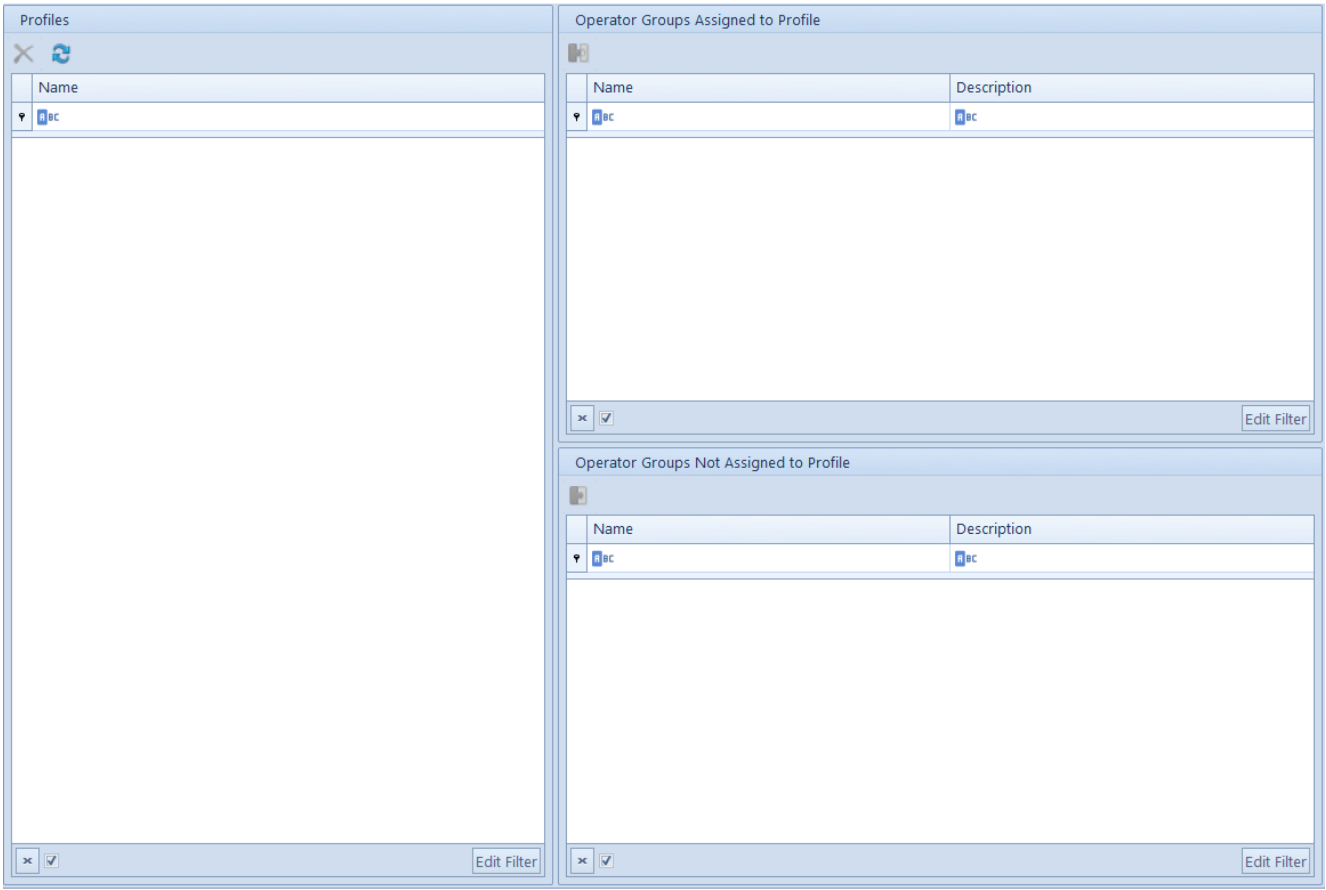
- *Automatically when adding items* – calculated bundles are verified each time upon adding an item. Default value.
- *Manually* – bundle discounts are calculated only after clicking on the button [**Calculate Promotions**]

In the case where the Handle bundle promotions parameter is deselected in a document definition (SQ, SO, SI, R), bundle promotions are not calculated in a given document type – the system does not verify items, during their addition, in terms of applied bundle promotions Discounts are not calculated when confirming or modifying data in a document.

Profiles

All changes made in interface configuration and views are saved in themes. It is not possible to change default theme for Comarch Retail POS application. When attempting to save the entered modifications of that theme with the use of [**Save**] button, the following message is presented: *“Cannot edit the default theme. Changes will be saved as its copy.”.* Then, name with which a theme will be saved must be specified in the displayed window.

Clicking on button [**New Theme**] allows for entering name of a new local theme, that is a theme available only on given POS workstation. To make a local theme available for selection on other POS workstations, click on button [**Export Theme**] and select folder in which file with *.layout* extension will be saved. Next, in Comarch ERP Standard, edit center to which the theme should be imported and go to tab *POS Workstations*. In the main menu select button [**POS Profiles**] which opens configuration window of POS profiles. With the use of [**Import from ZIP**] button, it is possible to select the file with saved Comarch Retail POS theme. The selected profile will be displayed on the list on the left side of the window. The right window part is divided into sections including operator groups assigned and not assigned to the profile. In order to attach or detach a group from profile, mark such group and click on button [**Attach**]/[**Detach**].



POS profiles configuration window

After performing synchronization between Comarch ERP Standard system and Comarch Retail POS application, operator included in a group assigned to the selected profile can select the saved theme in the interface configuration of a POS workstation.

Customers

Availability

The tile [**Customers**], available in the main menu or in the side menu, displays the list of active customers defined in company database of Comarch ERP Standard system and shared on

the POS workstation. All classification categories of customer groups active in ERP system are synchronized to the application. The user can define his/her customer classification categories, form the level of generic directory *General → Customers/Vendors Classification Categories.* Sharing of a classification category is possible in Comarch ERP Standard from the level of *Configuration → Company Structure → Object availability,* after indicating an appropriate center and *Customer/Vendor Groups.*
From the level of the list of customers in Comarch Retail POS, it is possible to add new customers or edit already existing ones as well as add new and change current address of a selected customer. These options are available only for users having POS permission *Addition and edition of a customer* assigned for the POS workstation.

Note
If in Comarch ERP Standard, on the form of a given customer, in the tab *Availability,* parameter *Modification* is unchecked for the center to which POS belongs, then, when trying to edit that customer, the following message will be displayed on the POS: *Insufficient permissions to edit customer [Customer name].*

Note
In case of in case the parameter *Addition and edition of a customer* is unchecked on the group of operators, the permission in the tab *POS Permissions* gets automatically unchecked. *Addition and edition of a customer.*

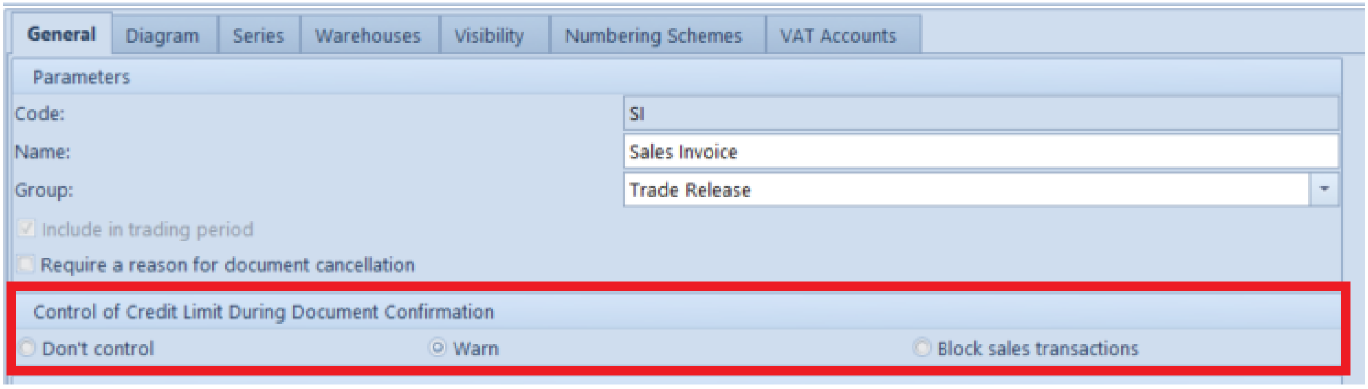
Consents

Consents defined in Comarch ERP Standard system are presented when adding/editing cusomers in Comarch Retail POS.
The possibility of <<registering consents on the POS workstation>> depends on whether a currently logged-in operator has an appropriate permission granted.

Credit limit

The functionality of credit limit allows a user to issue trade documents for a customer with specified credit limit without the necessity to register payment.
Credit limit handling for a POS workstation is configured in Comarch ERP Standard system in the *POS Workstations* tab. More information regarding configuration can be found in article <<Configuration parameters>>
Settings concerning credit limit amount and its validity dates are uploaded from tab *Credit Limits* of a customer form in Comarch ERP Standard system.
Behavior of the Comarch Retail POS application in case of exceeding credit limit for a customer can be set for document definitions available from the level of *Configuration → Company Structure → Rights Strucutre* after opening for editing the center to which the POS workstation belongs and opening the *Documents* tab. In the tab *General,* for *Control of Credit Limit During Document Confirmation* parameter, it is necessary to select one of the following options:

- *Don't control* – confirming document without checking credit limit of the customer for which it is being issued
- *Warn* – in case a customer does not enough funds to cover the debt, a message informing about exceeding the limit will be displayed
- *Block* – confirmation of a document issued for a customer whose credit limit has been exceeded will be impossible
  Parameter *Control of Credit Limit During Document Confirmation* on the definition of SI document Changing the settings of control of credit limit is available for *Receipt (R), Sales invoice (SI)* and *Sales order (SO)* document types.



Information regarding customer's credit limit is presented in the application, on a customer form, in *Credit limit* section, as two fields: *Maximum Limit* and *Available Limit* fields: Maximum Limit and Available Limit. In the case of open credit limit, the following information is displayed for both fields: *Open*

In a trade document upon specifying a customer as well as in the payment confirmation window, depending on setting of *Presentation of Available Credit Limit*, value of available limit is decreased when adding amount for payment form in the payment window, decreased when adding an item or is not presented. The same applies to a correction document, but in this case, amount value is increased.

Note

To enable payments with the use of a credit limit on a POS workstation, it is necessary to open the configuration of POS workstations belonging to a given center in Comarch ERP Standard system and select a specific payment form in the field *Payment Forms without Deposit.*

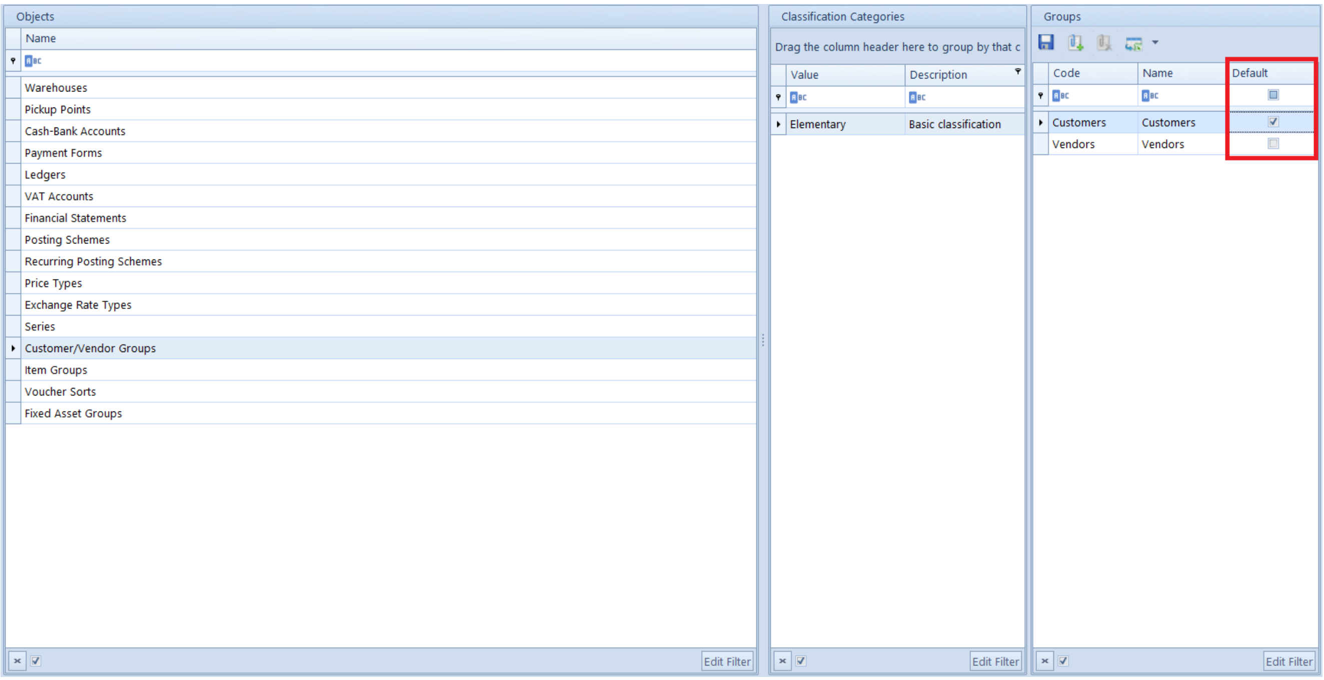
Note

In case handling of credit limit is enabled, payment forms without deposit are presented in the payment window for a customer assigned with credit limit. In turn, if a customer does not have credit limit granted, those payment forms are not displayed.

Handling of credit limit on a POS workstation requires on-line mode. Specifying the time since the last connection to the synchronization service after which the handling of the credit limit should be blocked, it possible thanks to *Max Time Since Last Synchronization (m)* parameter, which is available in Comarch ERP Standard, in the configuration of POS workstations for a given center.

Default customer group

From the level of Comarch ERP Standard system, the operator can define default customer/vendor groups within each classification category. By means of a default customer group, the operator may determine a group to which customers created in Comarch Retail POS are to be added.
The user can mark a group as the default one for a given category in a center's *Object Availability* menu, in the object *Customer/Vendor Groups*. On the list, it is necessary to select the checkbox in the column *Default* of the *Groups* window.



Default customer group in Object's availability

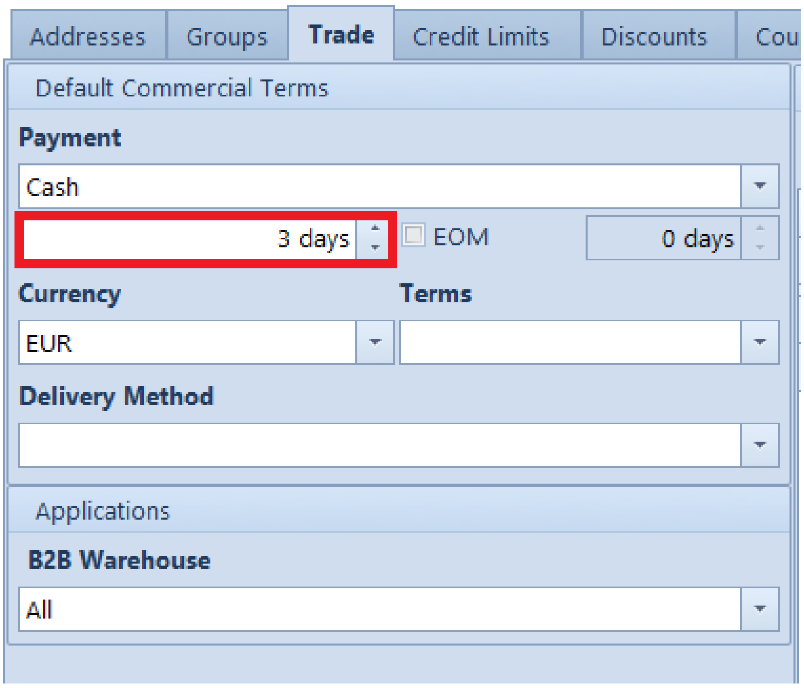
Reverse charge

The reverse charge functionality allows the user to transfer the responsibility for paying a transaction tax from the vendor to the customer. The *Handle reverse charge* parameter activating the functionality in Comarch ERP Standard system is available from the level of *System → Configuration → Trade*, in section [General Parameters](#)>. Upon its selection, on the form of customer parameter *Reverse charge* is available.

Note
The parameter can no longer be deactivated once synchronization with Comarch Retail POS is performed.
In Comarch Retail POS, a VAT rate for an item subject to reverse charge is set according to the configuration of the parameter VAT rate for reverse charge available in Comarch ERP Standard system from the level of *Configuration → VAT Rates.*

Due Date

In the case of payments without deposit, the due date is retrieved from the customer form, from *Trade* tab.



Setting default due date on a customer form

Price types

Detailed description regarding sharing of price types in specific centers can be found in article *Object availability*.
For each customer, it is possible to specify the availability of a given price type. More information regarding price types can be found in articles *Price types for received items* and *Price types for released items*
An operator logged-in to a given POS worksation can see only those price types which are assigned to the center to which that POS workstation belongs and, at the same time, are associated with a group or groups of operators to which that operator belongs.
If a price type does not have any customers assigned and it gets marked as default in a given center, then, a newly added customer on the POS workstation is automatically assigned to that price type.

Personal data anonymization

Anonymization of customer's personal data is available from the level of Comarch ERP Standard. More information regarding performing of the operation on a POS workstation is available in article *Personal data anonymization*. Configuration instructions for this functionality cna be found in article *Personal data anonymization.*

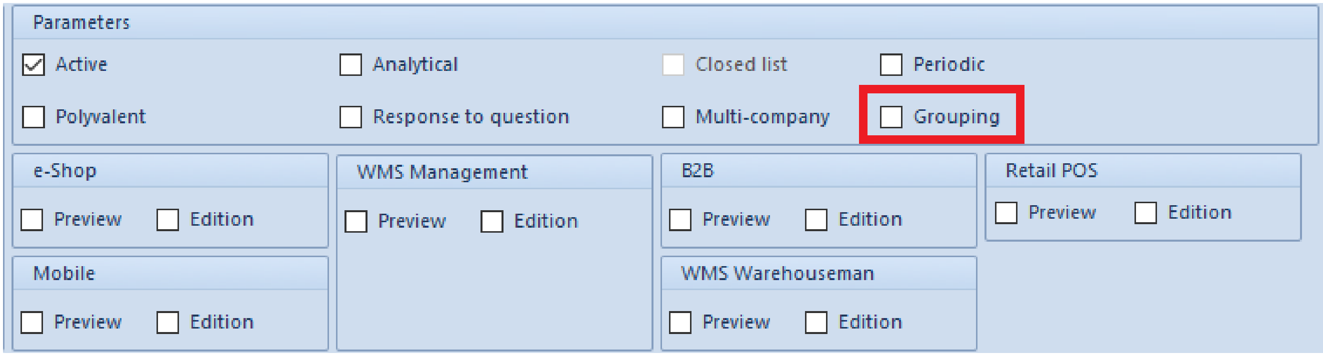
Configuration of basic items

The functionality of base products allows a user to associate items which are differentiated by some feature (e.g. size, color) in case separate item forms are created for each of these items. Base products are related through a grouping attribute assigned to items and by relation of *Base Product* type.

To be able to display grouped items in dependence of a given feature, parameter *Grouping* must be checked for a given attribute from the level of *Configuration → Attributes* in Comarch ERP Standard system.

A grouping attribute can be an attribute of *List* or *Text* type. Such attribute must have parameter *Preview* selected in *Retail POS* section.

Note
The first grouping attribute should be an attribute marking a feature which distinguishes items within a given group. That attribute will determine selection of subsequent grouping attributes.



Grouping parameter for an attribute

Note
Information about adding and defining of attributes can be found in article [*Defining attribute*](#).
After a grouping attribute is defined, items must be related with *Base Product* relation type. An item determined by this type of relation becomes parent for item related to it. Only one item in a group can be parent to others. An item already having a parent item cannot be a base item.

Example
A company sells short sleeve shirts which come in various patterns. Depending on selected pattern, different discount is granted.
In Comarch ERP Standard system, attribute *Pattern* of type *Text* is defined and it has parameter *Grouping* checked as well as option *Preview* in section *Retail POS*.

In the system, there is item *Shirt* available as well as items with attached *Pattern* attribute:

- White regular short sleeve shirt. Value of *Pattern* attribute: *White Regular*
- Red check short sleeve shirt. Value of *Pattern* attribute: *Red Check*
- Blue check short sleeve shirt. Value of *Pattern* attribute: *Blue Check*
- Pale blue regular short sleeve shirt. Value of *Pattern* attribute: *Pale Blue Regular*
- Black regular short sleeve shirt. Value of *Pattern* attribute: *Black Regular*

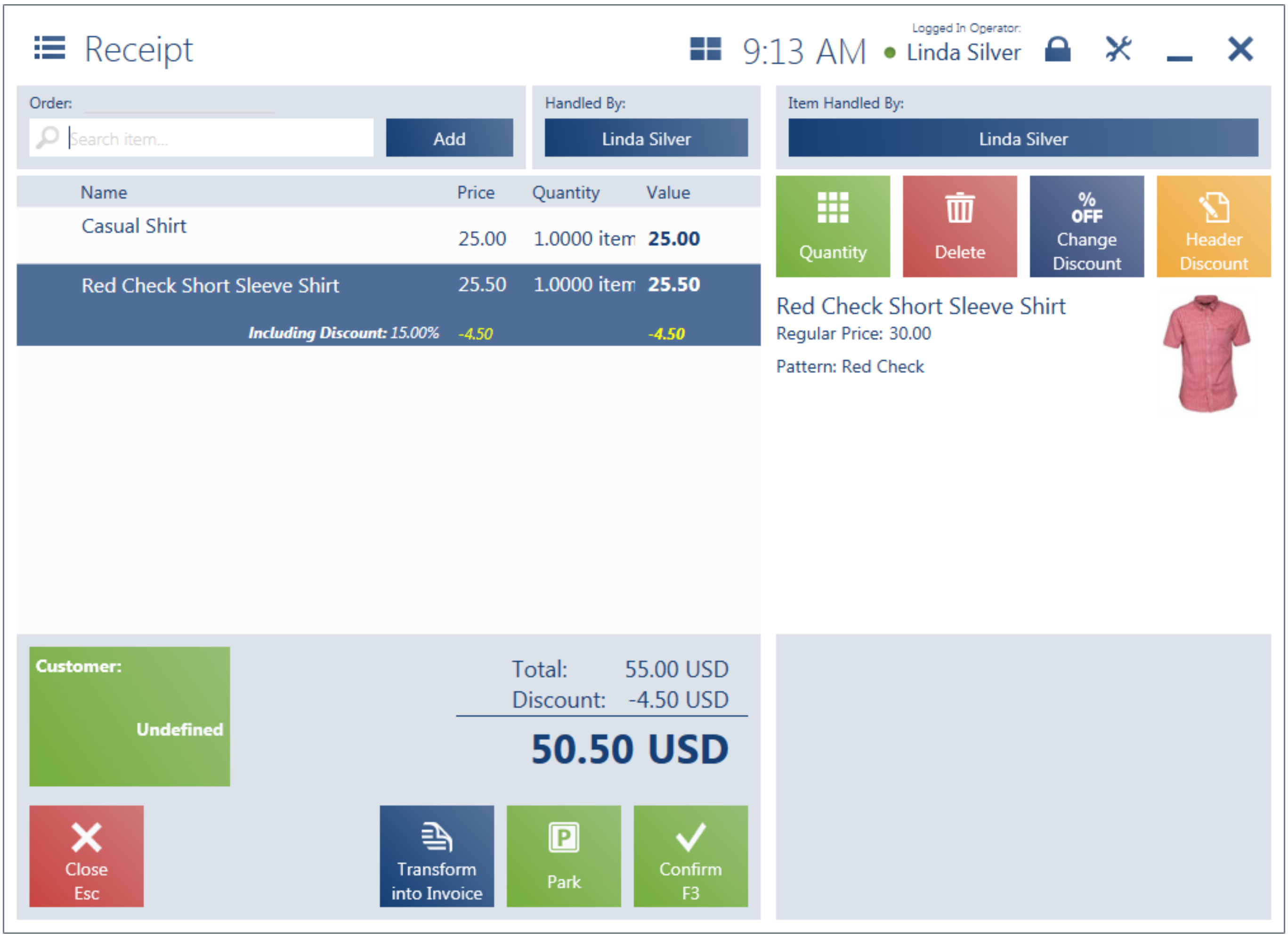
White regular short sleeve shirt item is related to other items with relation of *Base Product* type.

Item *Shirt* is related with item White regular short sleeve shirt with relation of *Substitute* type.

Item Red check short sleeve shirt has 15 % discount defined.

Upon adding item *Shirt* onto a trade document, in related items section there is item *White regular short sleeve shirt* presented. After selecting that item, a window with selection of *Pattern* attribute values is displayed.

Upon selecting a value, e.g. *Red Check*, item *Red check short sleeve shirt* is added onto a document with 15 % discount.



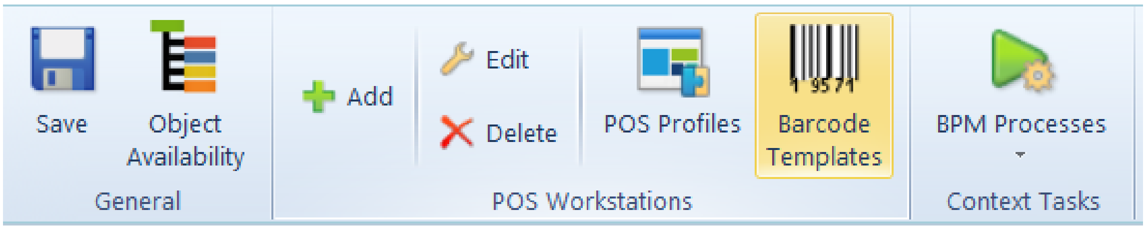
Drawer configuration

Tile [**Open Drawer**] allows for opening cash register drawer directly from the level of Comarch Retail POS application. In order to take advantage of this functionality, it is necessary define a device of *Drawer* type from the level of *Configuration → External Devices* and select the defined device in the configuration of POS workstation in Comarch ERP Standard system. Next, it is necessary to check parameter *User drawer*, available in the configuration of a given POS workstation.

Context scanning

Comarch Retail POS, it is possible to identify a scanned object based on a code format defined for it.

Example
A trade document is issued, and the operator scans a customer's card. It results in the automatic assignment of this customer to the active document. Scanning a card in a different place in the application opens the customer form.
The section *POS Workstations* on the ribbon (in the tab *POS Workstations* available upon editing a center of the *Company* type) has been provided with a new button [**Barcode Templates**].



Barcode Templates button

Selecting this button opens a list enabling the definition of code format templates for particular objects. Code formats have the form of a regular expression. The list is composed of three columns:

- **Object Name** – a selection field for the available types of objects: *Item*, *Document*, *Customer*, Voucher, *Employee*
- **Code Format** – a text field where a regular expression can be entered
- – this column is hidden by default

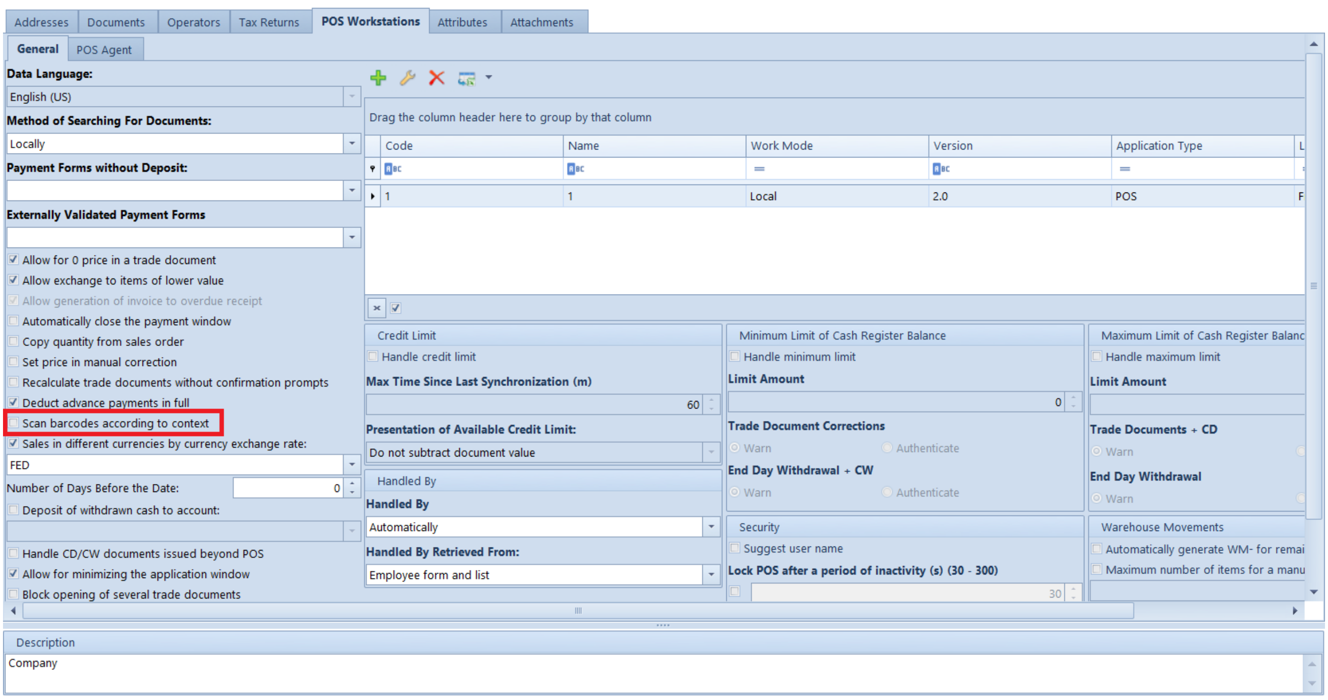
Code format templates are defined within a company, and once they are saved, they are automatically sent to all POS workstations attached to centers subsidiary to a given company.

Note
If barcode templates are configured for the parent company, they will not be sent to subsidiary centers of the *Company* type.

Note
Places where scanning an object barcode will not result in any action are:

- Logon screen
- Modal windows (e.g. messages, adding customer address)
- The view of starting/ending a day (unless a customer is scanned)

Except for defining code formats, it is also necessary to activate the functionality of context scanning by selecting a relevant parameter on the center form in the tab *POS Workstations.*



Parameter Scan barcodes according to context

Context scanning of a customer

If a customer code is scanned:

- The indicated customer is added as *Customer/Secondary Customer* in a document (R, SI, SQ, SO, ASI, SCL, TF, or in a manual correction). Context scanning for the *Customer* object is deactivated in the case of export confirmations in TF documents
- The indicated customer is added to CD/CW documents as *Payer*
- The indicated customer should be searched on the list of customers
- The indicated customer's form will open in any other place in the preview mode

Context scanning of an item

If an item code (or lot number) is scanned:

- The indicated item should be searched on the list of items
- In any other place, the application will open the list of items narrowed down to the selected item/lot
- The indicated item will be added as a document item in a document (it does not refer to TF documents)

Upon scanning a lot number in the window *Select Properties* (feature selection), the application will search for a relevant lot of a given item and substitute it on the list of document items.

Context scanning of an employee

If an employee/operator card is scanned:

- The indicated employee will be added in the field *Handled By* in R, SI, corrections, SO, SQ, WM-, RDR, CD, CW, ASI, SCL, TF
- The indicated employee will be added in the field *Handled By* in the window of starting/ending a day
- In any other place, this action will not give any results

Note
Scanning an employee will not select him/her in the field *Payer* in CD/CW documents.

Context scanning of a document

If a document number is scanned:

- The indicated document will be searched on the list of documents of a given type
- The document will be searched locally in any other place (also among parked documents). After the search, a window with the preview of a given document will be displayed. If the searched document is parked, it will be opened in the editing mode.

Context scanning of a voucher

If a voucher is scanned (as long as it is not associated with a customer as a loyalty card):

- In a trade document, the voucher will be added as an item for sale
- In CD/CW documents, payment form will be defined as *Own voucher*
- In the payment window the application will open the window of adding own vouchers and the indicated voucher will be added to it
- In other places of the system, the list of items

narrowed down to the indicated voucher is opened

If a voucher associated with a customer as a loyalty card is scanned (in the same way as a customer code):

- In documents, the customer associated with the indicated voucher will be set as *Customer/Secondary Customer*
- In other places of the system, the application opens for preview the form of of the selected customer

---

Document types

Working with documents on POS workstations

To be able to preview, add, modify or delete a document on a POS workstation, the operator must possess appropriate permissions to objects which are granted in the Comarch ERP Standard system.

Depending on the setting of the parameter *Method of Searching for Documents,* available in the POS workstation configuration, in the Comarch ERP Standard system, documents can be searched:

- locally, in the database of the POS workstation
- locally and in the ERP system

After opening tab *Documents* on the form of a given center/company, it is possible to open for editing any document type in order configure different parameters which are used also on POS workstations, e.g., VAT direction.

Trade documents

Once the tile [**Trade Documents**] is selected, the application displays the list of all trade documents issued on a given POS workstation. To issue a receipt or invoice, it is necessary to click on the tile [**New document**].

In trade documents, the due date is set as the current date. In the case of payments without deposit, the due date is retrieved from the customer form (*Trade* tab) in the Comarch ERP Standard system.

To be able to add corrections of documents, the user must possess the permission *Validation of refund* which is granted in Comarch ERP Standard. It is not possible to confirm a correction without specifying it reason. Clicking on [**Reason for Correction**] button opens window for selecting values which are defined in Comarch ERP Standard system in *Reason for Corrections* generic directory.

Note
If parameter *Allow exchange to items of lower value* is unchecked for a given POS workstation and item of lower values is to be exchanged, the following message is displayed upon confirming the document: *"Cannot confirm the exchange. Return value is greater than value of new items."*.

Orders and quotes

The list of available sales orders is displayed upon clicking on tile [**Sales Orders and Quotes**] in the main menu. In the case of sales orders, it is also possible to process orders issued originally in Comarch ERP Standard and Comarch e-Shop systems. This allows a user to comprehensively handle orders submitted by a customer in a given store or other subsidiary of a company or in online store. Moreover, Comarch Retail POS application enables full or partial processing of sales orders, in case if, for instance, a customer resigns from a given item or that item is not available in a warehouse.

Sales quotes issued in Comarch ERP Standard are handled both in Comarch ERP Standard and at POS workstations. It is not possible to retrieve quotes issued in a different store. All confirmed SO, issued in the center to which a given POS workstation is attached, are uploaded to that POS workstation from Comarch ERP Standard.

Sales orders from Comarch ERP Standard or issued in other subsidiaries (on other POS workstations) are visible on the list of sales orders if

- their status is *Confirmed*, *Processed* or *Pending* and their owner is a center to which the given POS workstation is attached
- center to which the given POS workstation is attached or a warehouse available in that center is specified as pickup point and their status is *Confirmed, Processed* or *Pending*
- store/center to which the given POS workstation is attached is specified as pickup point and their status is *Confirmed, Processed* or *Pending*

Pickup point can be selected in the header of sales order form, both in Comarch ERP Standard and in Retail POS. Pickup points are defined in Comarch ERP Standard only.

If a sales order synchronized with a POS workstation is closed, canceled or modified in Comarch ERP Standard system, such changes are also synchronized to that POS workstation. Therefore, it is possible that order document with status *Closed* or *Canceled* is displayed on the list of sales orders in the application.

On a POS workstation, it is not possible to exclude order items from processing, but the user of the application can continue processing a document that has been modified in this way. Changes made in Comarch ERP Standard system that pertain to excluding items or modifications in a confirmed SO document are transferred to Comarch Retail POS. Modification of a confirmed order and excluding items from processing require a special permission.

Operations performed with regard to:

- orders issued in Comarch Retail POS and synchronized in Comarch ERP Standard,
- orders issued in Comarch ERP Standard and transferred to a POS workstation,
- synchronized orders issued on another POS workstation,

require connection with Data Service. In the case of such orders, an attempt to:

- change the status,
- open,
- close,
- cancel,
- generate a receipt, sales invoice, advance sales invoice,

will create online connection with Comarch ERP Standard in order to verify the possibility of performing a selected operation, to activate the blockade, and to retrieve the current version of the order. If the blockade of the sales order is active (activated on another workstation or in Comarch ERP Standard system), the user will receive the following message while trying to perform one of the abovementioned operations: "*The operation cannot be performed. The document is being modified on another workstation*".

With the online handling active, order versions should be the most current in Comarch ERP Standard. Blocking an order while performing a particular operation guarantees that the order will not be meanwhile modified in a different place (from the level of Comarch ERP Standard or another POS workstation). The blockade is deactivated once the operation is finished.

If there is no connection, it is still possible to:

- issue a new order, generate trade documents to it, and modify it
- issue trade documents for an order synchronized from Comarch ERP Standard. These documents will not be associated with the order and advance invoices will not be created. However, in this case it will be possible to enter a given order number in a receipt or invoice, owing to which the associated documents could be easily identified later on

SO documents that have the status *Unconfirmed* are not synchronized on POS workstations.

If there is no connection with Data Service, the following message will be displayed upon generating trade documents to a synchronized sales order: "*Connection with data service is not established. The document will not be associated with the order and advance payments will not be deducted. Would you like to continue?*". If the option *Yes* is selected, the generated document displays the number of a SO document in order to make it easier for the operator to associate the documents later.

Note
During the attempt to generate a trade document to a SO document for which a R/SI has been already generated in Comarch ERP Standard, the following message will be displayed: *Cannot generate a document. The order has been changed on another workstation.*

Warehouse documents

The tile [**Warehouse Documents**] displays the list of warehouse documents issued in the Comarch ERP Standard system within a given POS workstations. The list contains both receipt and release documents.

Warehouse movement documents can be generated and handled between the Headquarters and warehouse subsidiaries in two ways:

- By generating a WM- document in Comarch ERP Standard and processing it further at POS workstation. This option is used in companies running a central resource allocation unit
- By generating a WM- document at POS workstation for both the Headquarters' warehouse and other subsidiary warehouses. If this is the case, movements of warehouse releases and receipts are handled at POS workstation

A single warehouse can only be available for WM- documents within a single center to which POS workstations are attached. More information regarding sharing a warehouse for WM- documents can be found in article Adding new POS workstation.

For WM-/WM+ document to be uploaded to POS workstation, it should fulfill one of the following conditions:

- WM- is unconfirmed with selected parameter *Process in POS* and a source warehouse associated with a WM- document issued in the center to which POS is attached
- WM- is confirmed with a source warehouse assigned to a WM- document in the center to which POS is attached. In this case, uploading of certain quantity from a shop is forced by the Headquarters
- WM- is confirmed and issued for a target warehouse in the center to which POS is attached. The warehouse must be assigned to WM+ document in the same center

- WM+ is confirmed and issued for a target warehouse assigned to WM+ document in the center to which POS is attached

The functionality of receiving and releasing deliveries is available for users having permissions to modify warehouse movement documents and receiving and delivery report (in case of receiving deliveries).

A WM- document, issued in Comarch ERP Standard, receives appropriate document number. During its confirmation in POS, it is renumbered according to the POS numbering. Its previous number is registered in *Source Number* field, which makes possible to find the associated WM- documents both at POS workstation and in Comarch ERP Standard.

Cash register documents

The list of CD/CW includes all cash register deposits (CD) and cash register withdrawals (CW) issued manually on a POS workstation, that is, not associated with a trade document, e.g., a receipt or a sales invoice.

Currencies

Parameter *Sales in different currencies by currency exchange rate* option allows for carrying out of transactions (sales) in all defined currencies. By default, in Comarch ERP Standard system denominations are defined for PLN, EUR and USD currencies. If a new currency is added in the system, it is possible to define appropriate denominations from the level of *Configuration → Currencies*. In order to do so, edit a currency and in tab *Denominations* enter data referring to denomination symbol, conversion calculator in relation to the unit denomination and, optionally, specify additional description. The entered changes must be saved. For the defined denominations to be available in the functionality of counting cash register balance, it is necessary to update data on a POS workstation or restart the application.

Currencies in the payment window

After displaying the payment window, amount from field *To Be Paid* will be automatically transferred to the field located above the numeric keyboard, owing to which the amount can be immediately changed by using the keyboard. Button [**Assign**] visible on the left side of the field allows for reassigning full amount to be paid. Amount is displayed in the system currency, by default. Currency can be changed by selecting other currency from a drop-down list of currencies available in the system. In such case, amount to be paid is displayed in the selected currency and its value is recalculated by exchange rate defined in Comarch ERP Standard system.

Assigning of amount to a payment form is performed by clicking on a tile with given payment form, e.g. [**Cash**] or [**Bank Transfer**]. In the payment window, there are all active payment forms displayed which were defined for the POS workstation. Deactivating a given payment form or detaching it from POS workstation makes it invisible in the payment window.

Payment in various currencies assigned to one payment form, e.g., *Cash*, will be presented as a sum of payments, separately for each currency.

Displaying of amount in field *Remaining/Change* depends on sum of all payments recalculated into the system currency. If amount to be paid is not assigned in full to the selected payment form, field above the numeric keyboard is automatically filled in with amount remaining to be paid.

Window of the start and of the end of the day

In the window of the start of the day, the beginning cash register balance for the *Cash* payment form is displayed within the currencies available in the system, The end of day window includes a list of all payment forms available on a POS workstation, displayed in division into available currencies

In the *Cash Register Counting* window displayed for *Cash* payment form, a user enters counted number of banknotes/coins in a given denomination which are stored in the cassette/drawer.

Cash deposits and withdrawals

Cash deposits and withdrawals in Comarch Retail POS application can be processed in different currencies (provided that an account supporting currency other than system currency was attached) in a selected form and issued for a customer or an employee.

Data Service synchronization logs

In Data Service synchronization logs, information regarding all objects uploaded from Comarch Retail POS to Comarch ERP

Standard is saved. On the basis of such logs, it is possible to tell whether an object has been uploaded correctly or some errors occurred.

Service synchronization logs are saved in the path indicated in *DS.exe.config* file, which is available in the installation directory of Comarch ERP Standard, in *LoggingDirectoryPath* field.