

XY STYLIST

User Guide

DOCUMENT DETAILS

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Stylist Sign in Overview	4
Sign in with Microsoft SSO	5
Sign in with Password	6
Sales Order	8
Creating a Sales Order	11
Adding Missing Item	12
Adding an Existing Customer	20
Adding Services	22
Service List Overview	24
Adding Note	26
Adding Discounts and Promotions to the Cart	27
Applying Percentage Discount	29
Applying Fixed Discount	30
Applying Promotion	34
Marking Item as a Gift	38
OMNICHANNEL REASON Overview	41
Updating Item Price	44
Applying Tax Exemption	45
Changing Associate	47
Changing Associate Before Scanning	49
Changing Associate After Scanning	50
Deleting an Open Sales Order	51
Return Order	54
Returning an Order	57
Built-in Filter Search	58
Returning an Item	63
Exchange Order	67
Exchanging an Order	72
Reservation	73
Creating a Reservation	78
Creating Sale from a Reservation	79
Built-in Reservation Filter	83
Releasing Items from Reservation	91
Deposit Linked Reservation	95
Creating a Reservation and Collecting a Deposit	99
Applying Deposit for a reserved Item and Completing the Sale	100
Built-in Deposit Filter	105
Consignment	111
Creating a Consignment	116
Creating Sale from a Consignment	120
Built-in Consignment Filter	128
Releasing Items from Consignment	132
Gift Registry	137
Creating a Self Gift Registry Account	136

Creating Friends and Family Gift Registry Account	148
Verifying New Gift Registry Account	163
Adding Deposit to Gift Registry Account	167
Redeeming Deposit from Gift Registry Account	172
Payment Methods	179
Closing Sale with Cash Payment	180
Closing Sale with Adyen Payment	182
Closing Sale Manually During Adyen Network Error	185
Closing Sale with Split Payment	190
Closing Sale with Store Credits	193
Closing Sale with Nexi Payment	195
Closing Sale with Pay by Link	198
Closing Sale with QR Code	201
Closing Sale with Wire Transfer	204
Closing Sale with Cheque	206
Closing Sale with Foreign Currency	208
Closing Sale with Credit Amount	210
Closing Sale with Gift Card	212
Customer Profile Registration	214
Creating a New Customer Profile	215
Creating a New Address	223
Creating a New Tax Profile	226
Configuring Marketing Permissions, Contact Preferences, and Customer Signature to Customer Profile	231
Customer Insights	235
Customer Insights Page Overview	236
Accessing the Customer Insights	239
Shipping	243
Setting up Shipping Address	244
Shipping Process: Pick, Pack, and Ship	250
Pick	251
Built-in Shipment Filter	255
Pack	260
Ship	262
Ship Phase: Auto Shipment	263
Ship Phase: Manual Shipment	267
Tax Retrieve Archive Documentation for Audits	270
Downloading Daily Archive Report	271
Downloading Periodic Archive Report	277
Accessing FISCAL REGISTER REPORT	283
Invoicing	292
Print Invoice	293
Global Blue Tax-Free	298
Applying Tax-Free to Sales Order with Global Blue	301
Voiding a Global Blue Tax-Free Applied to a Sales Order	311
Voiding Global Blue Tax-Free Status on Return Order	313

Verifying the VOID number for a Return Order	320
Planet Tax-Free	323
Applying Tax-Free to Sales Order with Planet	324
Reprinting the Planet Tax Free Invoice	328
Voiding Planet Tax-Free Applied to a Sales Order	332
Voiding Planet Tax-Free Status on Return Order	335
Reprinting the Planet Tax Free Credit Note	342
Physical Card Registration	345
No Card Registration	349
Upgrading from No Card to Physical Card	354
Promotions	359
Creating and Deploying Promotions	361
Creating an Inclusion/Exclusion Template	379
Promotion Management: Edit, Copy, and Status Updates	381
Tap to Pay on iPhone Overview	385
Getting Started with Tap to Pay on iPhone	386
Tap to Pay on iPhone: Payment Flow	389
Split Payment Using Tap to Pay on iPhone	396
Inventory Count	397
Non Serialized Inventory Count Using Full Count	399
Non Serialized Inventory Count Using Cycle Count	409
Serialized Count	421
Inventory Count Import File Template	433
Copyright	434



experience forward ///

XY Stylist

Introduction

The XY Stylist Guide serves as your primary resource for optimizing the functionality of our **POS** features. It is specifically designed to assist you in various tasks and provide the necessary information to maximize the platform's capabilities.

This comprehensive guide offers detailed, user-friendly instructions for utilizing our software across multiple scenarios, including:

- **Managing sales processing**
- **Tracking inventory**
- **Managing customer data through integrated CRM tools**
- **Employee management**
- **Reporting and analytics**
- **Applying discounts and promotions**
- **Handling returns and exchanges**
- **Ensuring compliance and security**

We are grateful that you chose XY Retail, and we look forward to helping you achieve your goals with our platform.

Stylist Sign in Overview

We understand the significance of safeguarding your account details, and our goal is to ensure a secure and smooth sign in experience.

We offer two main methods for accessing your stylist account:

- **[Sign in with Microsoft SSO](#)**: This method simplifies the access to your account by utilizing your Microsoft credentials.
- **[Sign in with Password](#)**: This method utilizes the username and password that you have setup specifically for your stylist account.

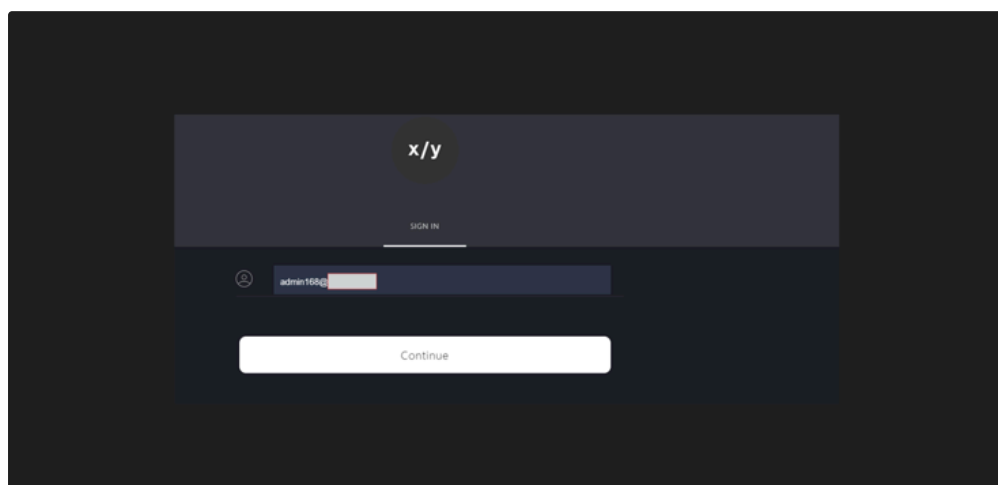
Sign in with Microsoft SSO

Introduction

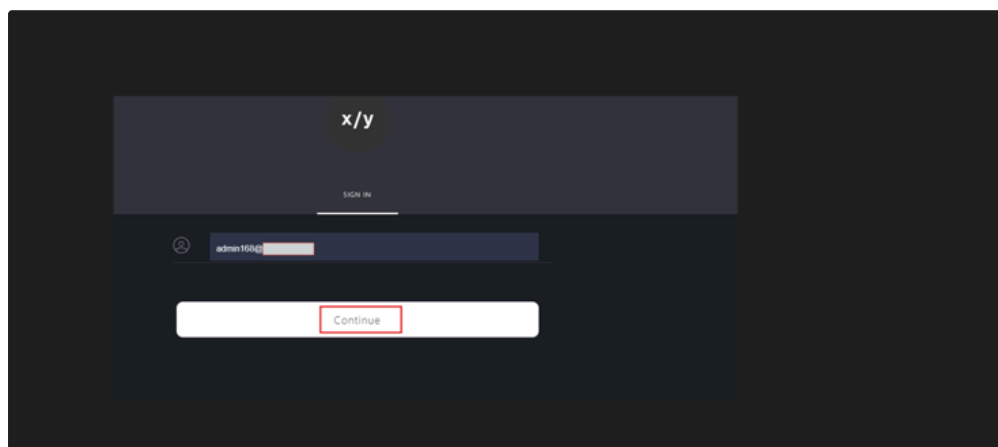
This topic provides you a comprehensive overview of the Microsoft SSO sign in process for your Stylist accounts. Microsoft SSO facilitates secure access without the requirement for manual password entry.

Steps to Stylist Sign in with Microsoft SSO

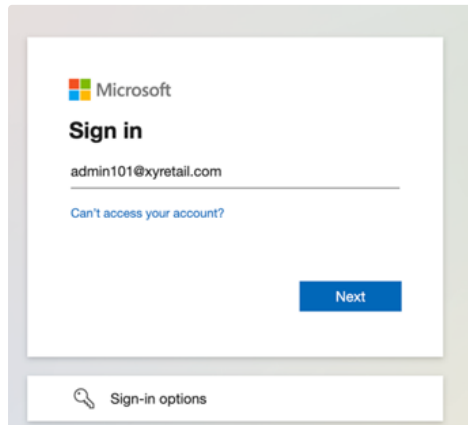
1. Navigate to XY Stylist [sign in page](#).
2. Enter your **Username**.



3. Click **Continue**.



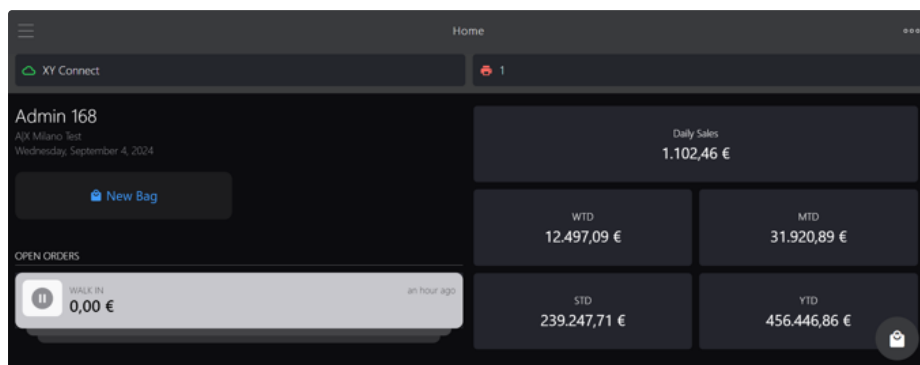
4. You are redirected to Microsoft SSO page.



5. Select one of the following authentication methods:

- a. **OTP:** You can enter a one-time password received via SMS, email, or an authenticator app such as Microsoft Authenticator.
- b. **Face Recognition:** You can authenticate using facial biometrics for enhanced security.
- c. **Phone-based Authentication:** You can verify your identity using a code received via phone call or text message.
- d. **Security key:** Microsoft SSO supports the use of physical security keys, such as USB or NFC tokens, for additional security measures.

6. After successful authentication, you will be directed to Stylist homepage.



📌 If you experience an SSO sign-in issue, promptly reach out to Microsoft support for assistance.

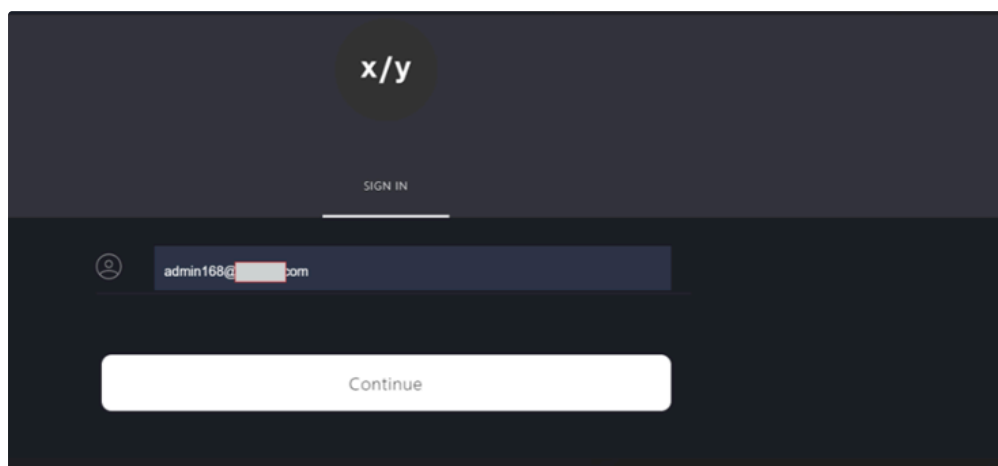
Sign in with Password

Introduction

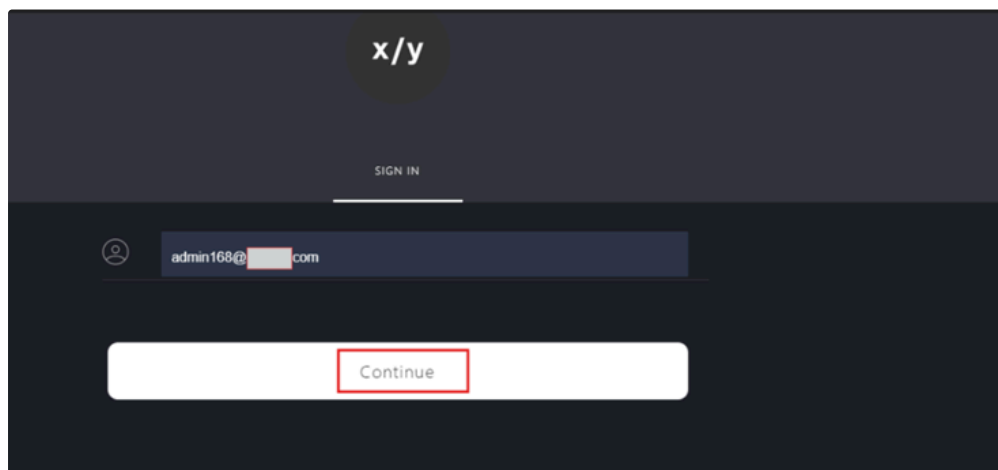
This topic offers you a streamlined approach to accessing the Stylist, specifically for scenarios where Microsoft SSO is not utilized. By adhering to these concise steps, you can achieve a seamless sign in and optimize your work processes.

Steps to Stylist Sign in with Password

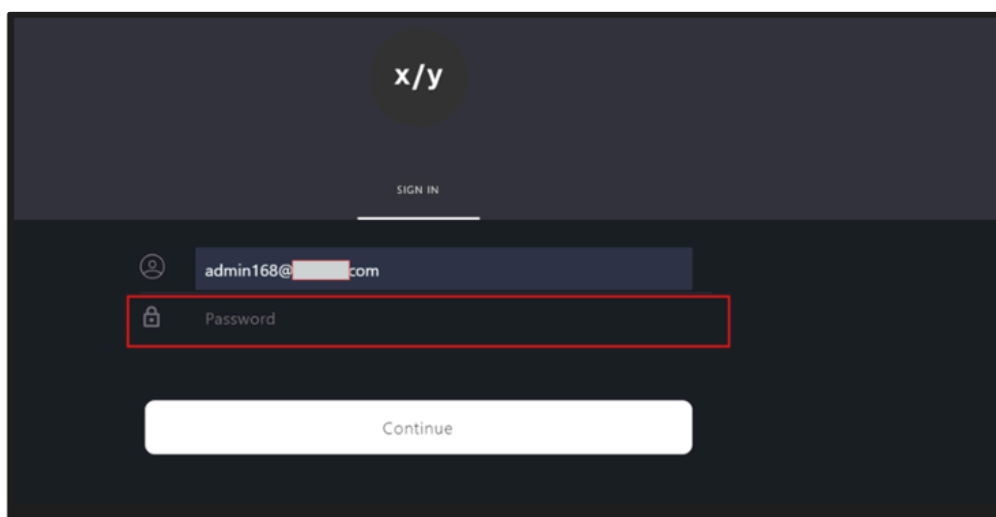
1. Go to XY Stylist [sign in page](#).
2. Enter the email address in the box.



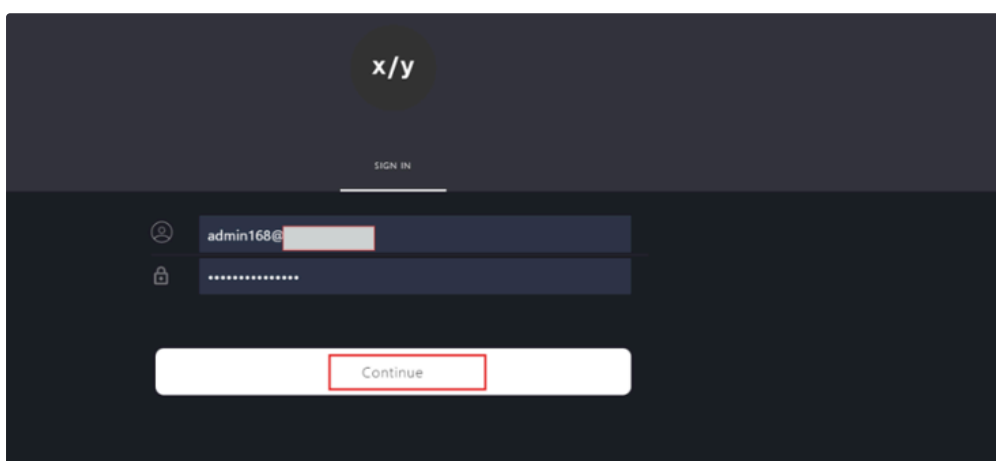
3. Click **Continue**.



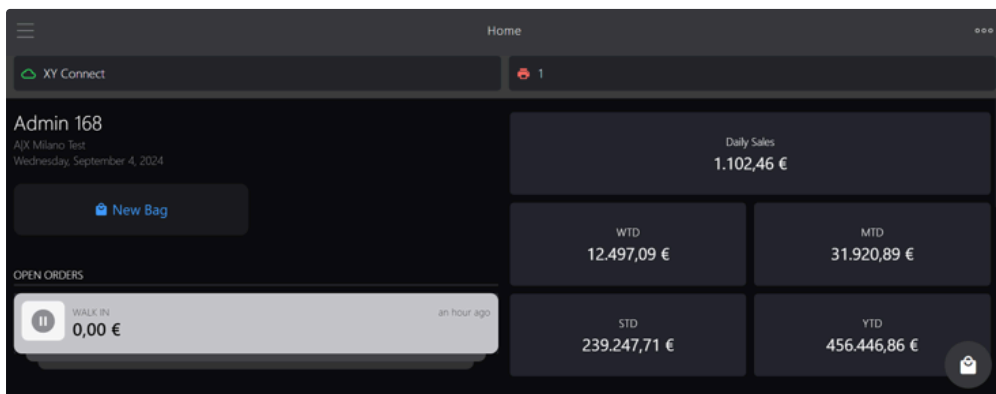
4. Enter the password in Password field.



5. Click **Continue**.



6. After successfully entering your password, you will be redirected to Stylist homepage.



Sales Order

A sales order is an electronic document containing all the details of a customer's order.

The following lists the information contained in a sales order.

- **Customer:** Provides the customer's name, address, and contact information.
- **Product(s):** Provides the product(s) purchased, including product type, product quantity, and item price.
- **Order Total:** Provides total price including sales tax, tax exemption, discounts, and shipping.
- **Terms of Sale:** Provide accepted method(s) of payment.
- **Delivery Information:** Provide delivery of the confirmed order.

A sales order is essential for Sales Associates (SAs) to manage the sale, the transaction, and the recording documentation.

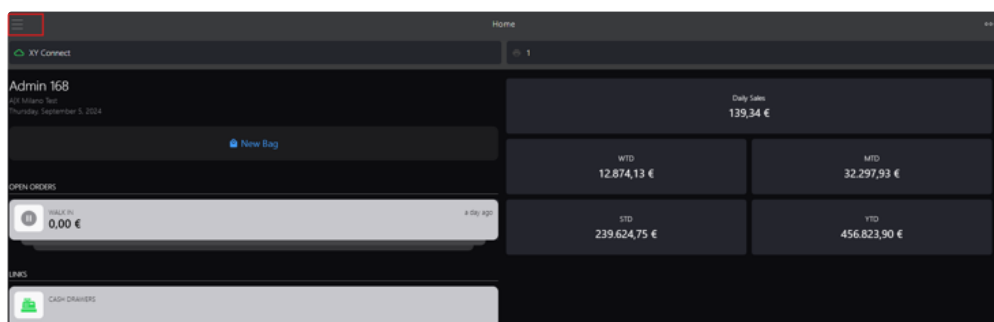
Creating a Sales Order

Introduction

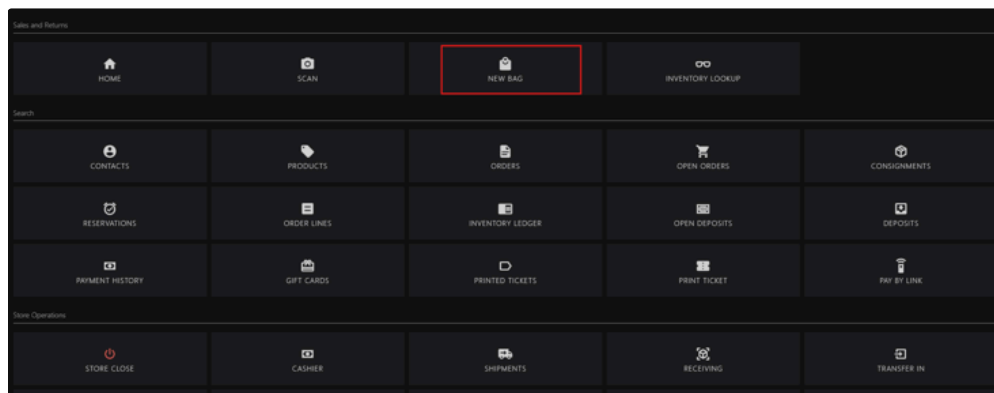
This topic explains how to create a sales order and effectively manage transactions.

Steps to Create a Sales Order

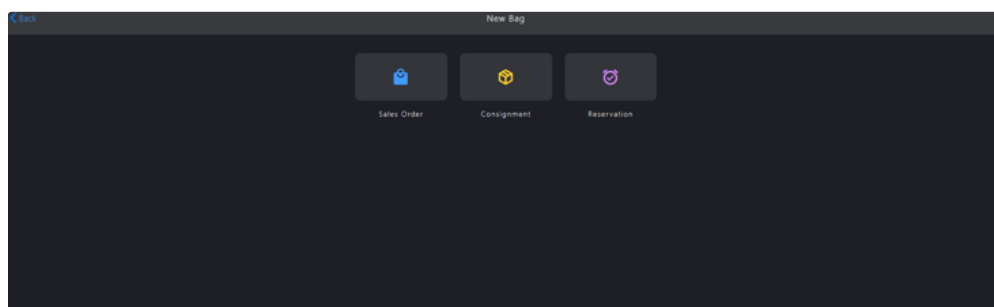
1. Click the burger menu.



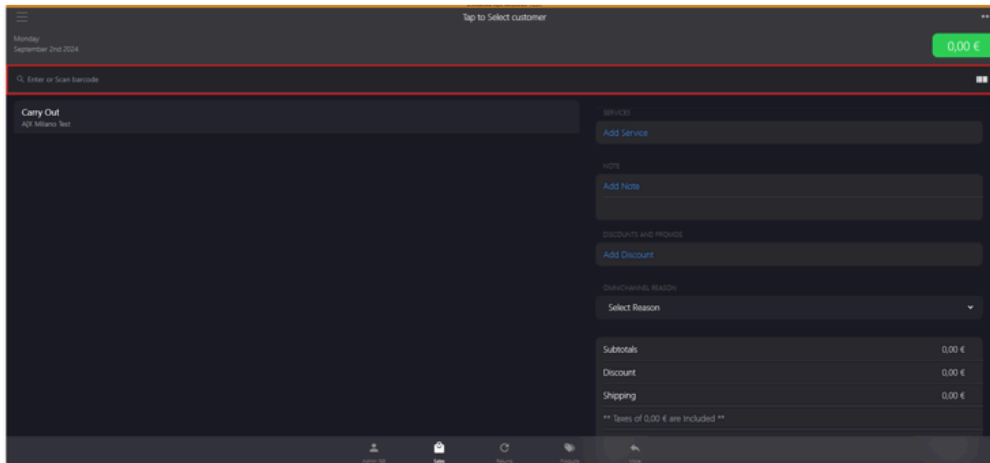
2. Click **NEW BAG**.



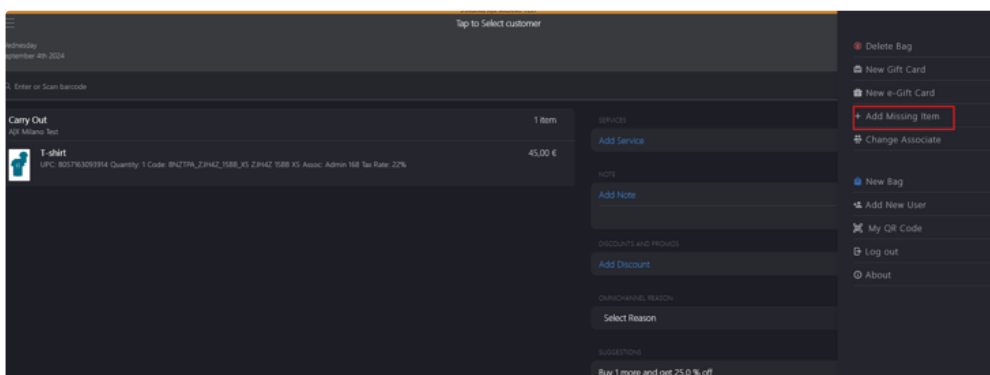
3. Click **Sales Order**.



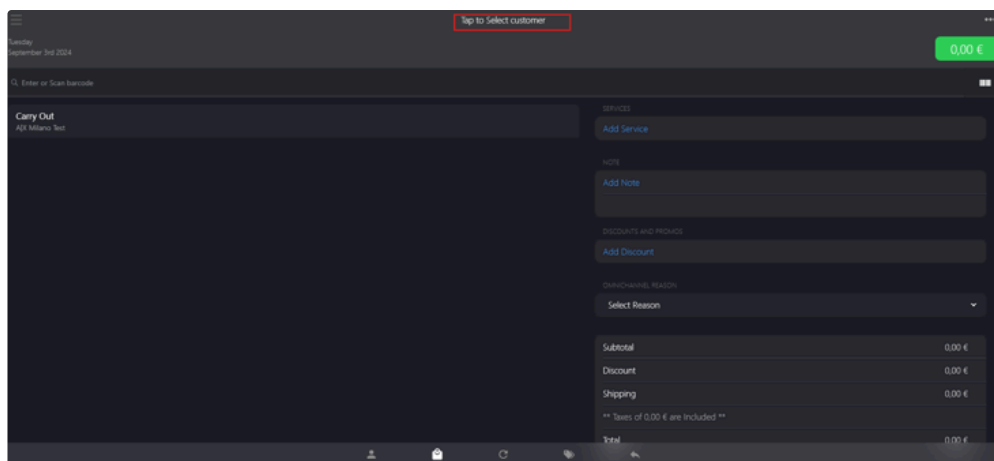
4. Go to **Enter or Scan barcode** box to add the products.



- If you have a barcode scanner, scan the product's barcode. The code will automatically appear in the box.
- If a scanner is unavailable, manually enter the product barcode number into the box.
- If you cannot find the item, go to the meatballs menu and select [+ Add Missing Item](#) to save the item to **Products** (store specific).



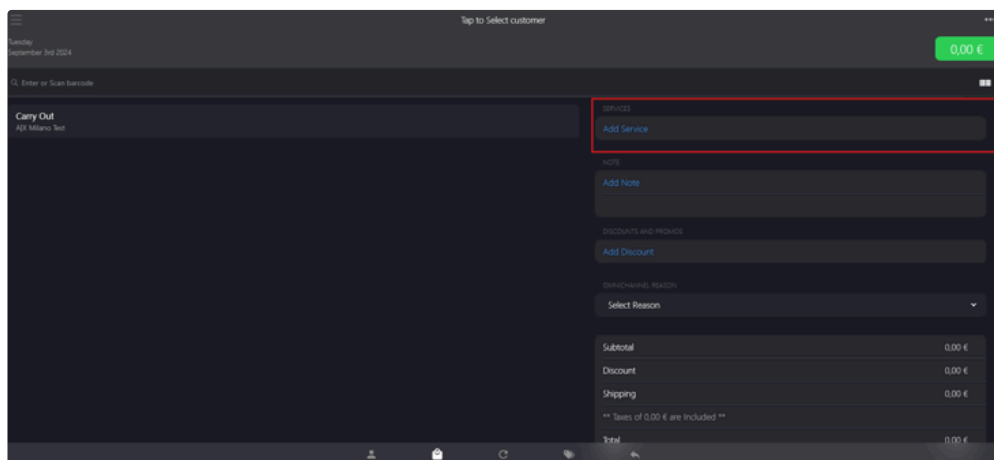
5. Click [Tap to Select customer](#) to add the customer.



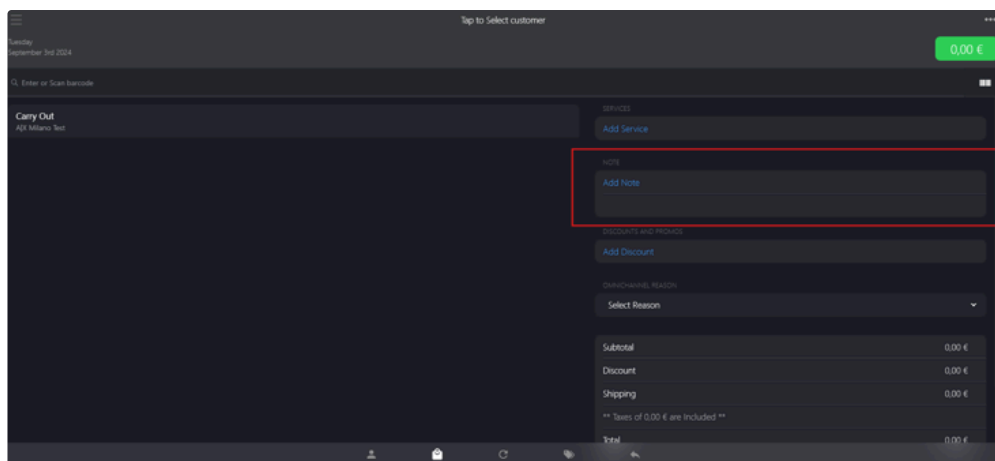
6. Modify the associate linked to a sales order.

- a. [Changing Associate before scanning](#)
- b. [Changing Associate after scanning](#)

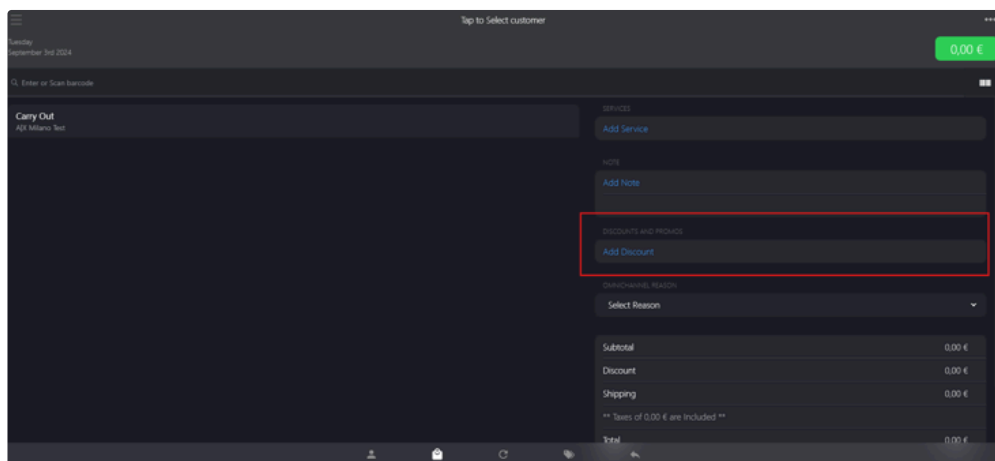
7. In the **SERVICES** section, click [Add Service](#) to add services.



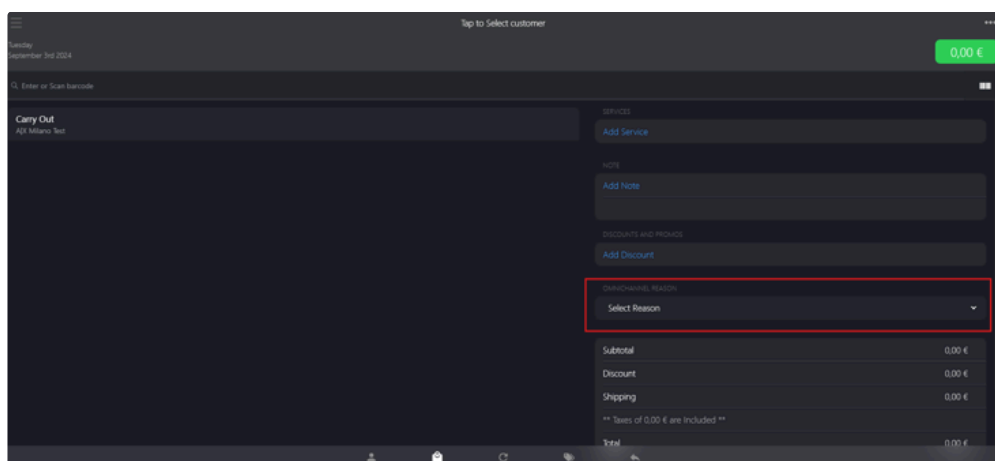
8. In the **NOTE** section, click [Add Note](#) to enter any notes related to the sales order.



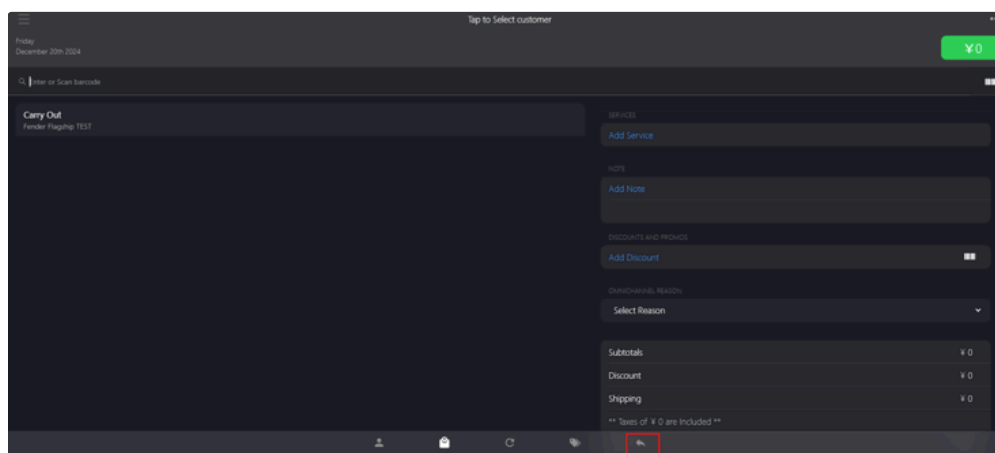
9. In the **DISCOUNTS AND PROMOS** section, click [Add Discounts](#) to apply the discounts, such as percentage discounts.



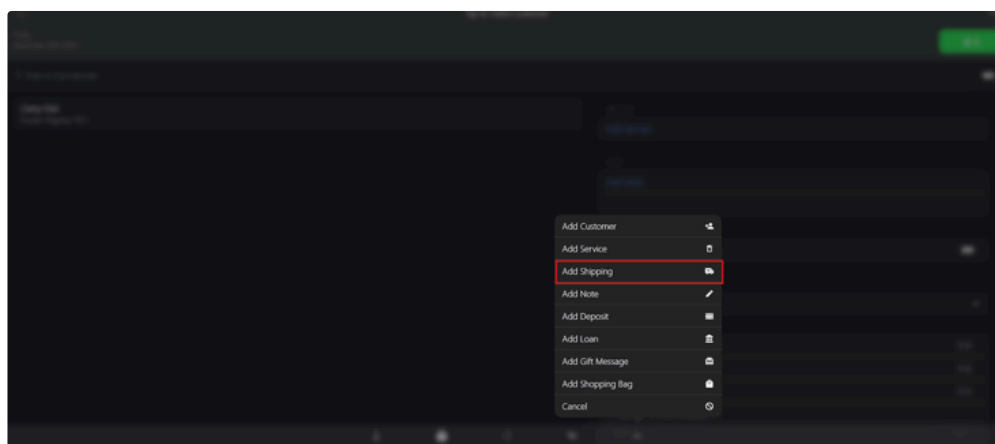
10. In the **OMNICHANNEL REASON** dropdown menu, click [Select Reason](#) to choose the appropriate reason.



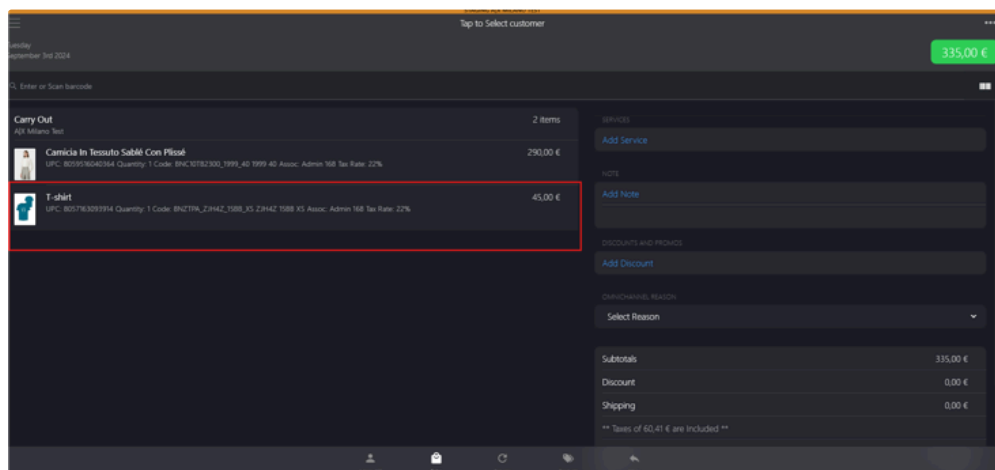
11. In the bottom bar menu, click **More**.



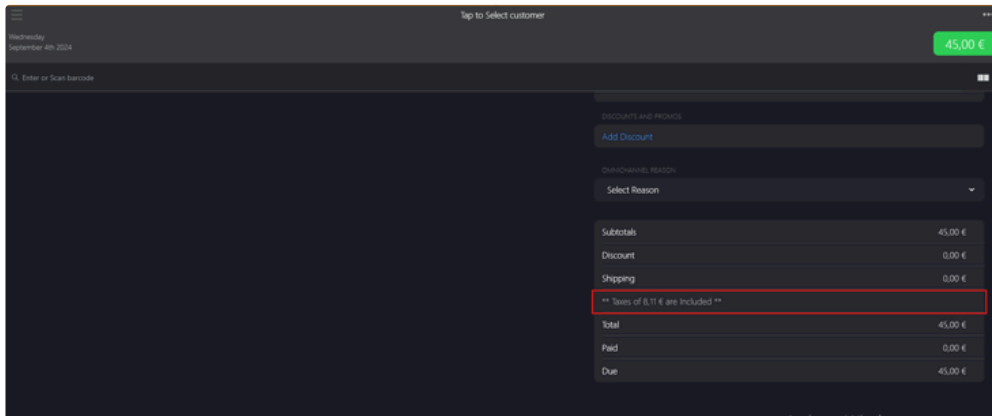
12. Select **Add Shipping** from **More** popup menu.



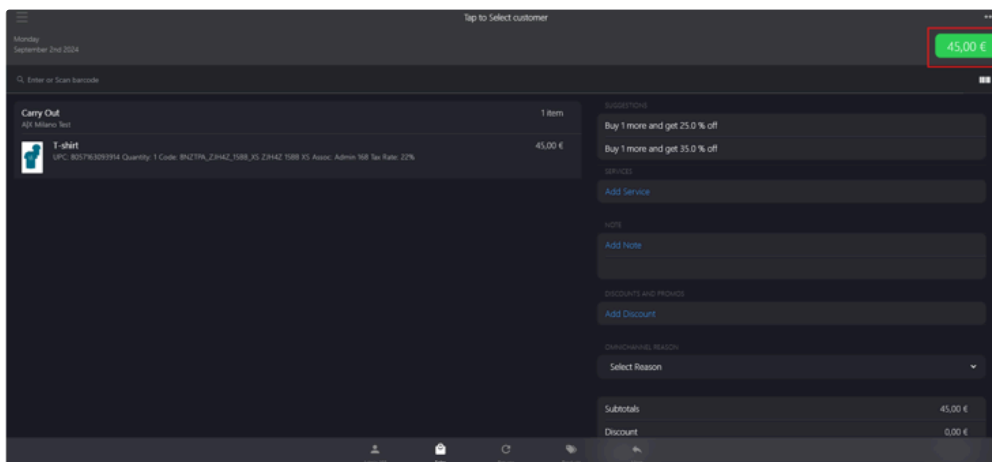
13. Click the item to **edit the price** (optional).



14. Click **Taxes** field to [apply tax exemption](#) (optional).

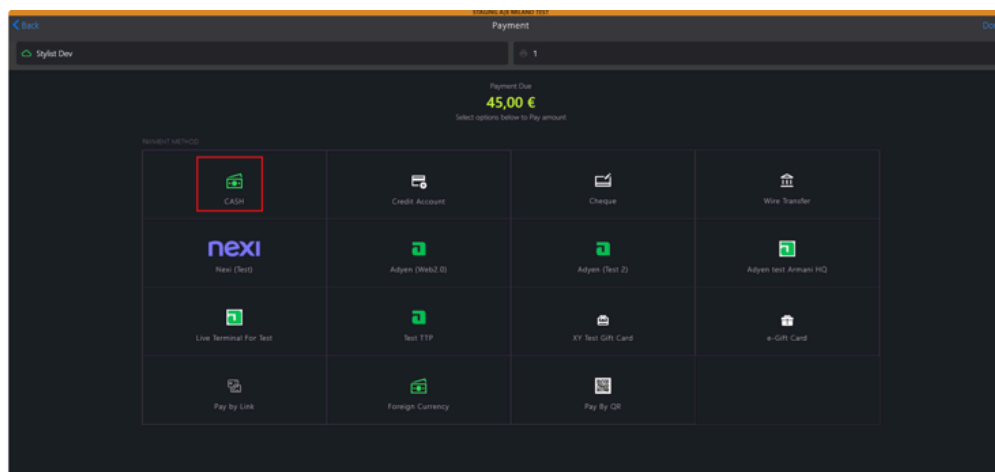


15. Click the green button in the upper right corner.

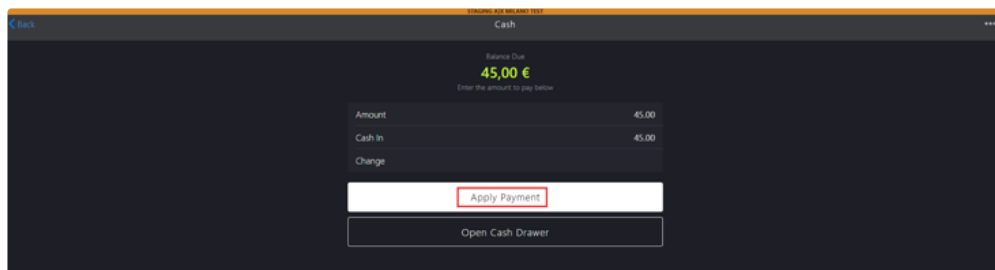


16. Select the preferred payment options.

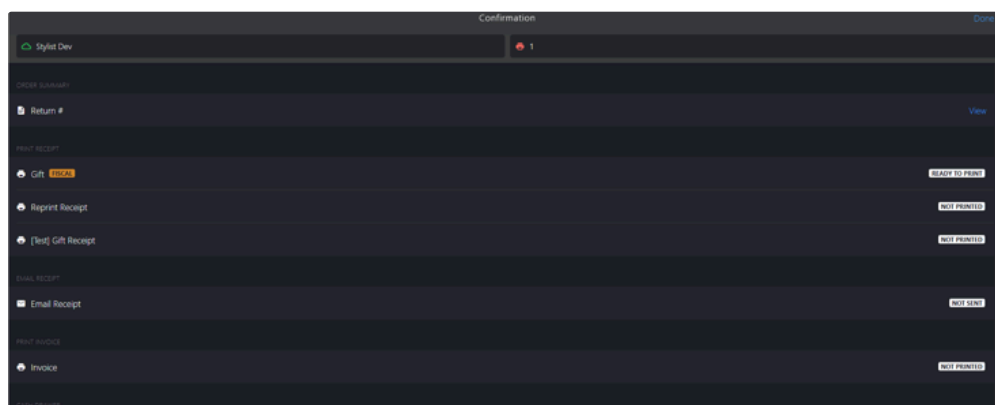
Note: **CASH** option has been selected in this scenario.



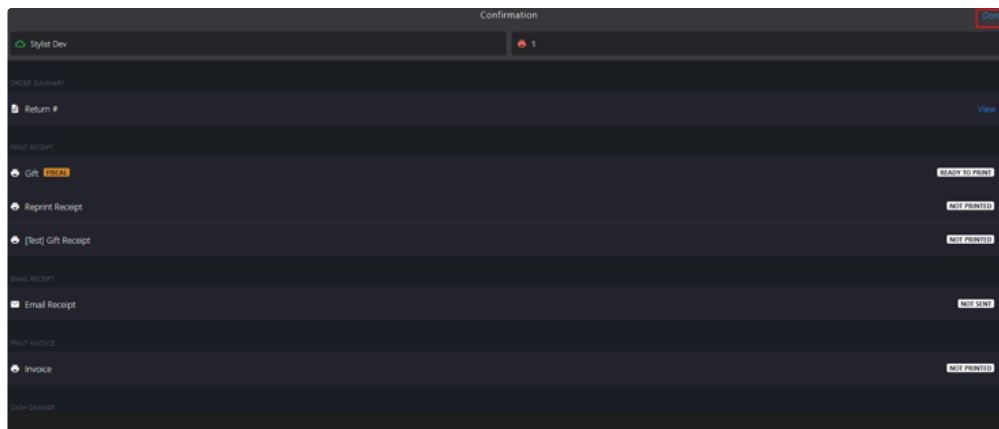
17. Click **Apply Payment**.



18. You will be directed to the **Confirmation** page where you can print the receipts.



19. Click **Done** to complete the sales transaction.



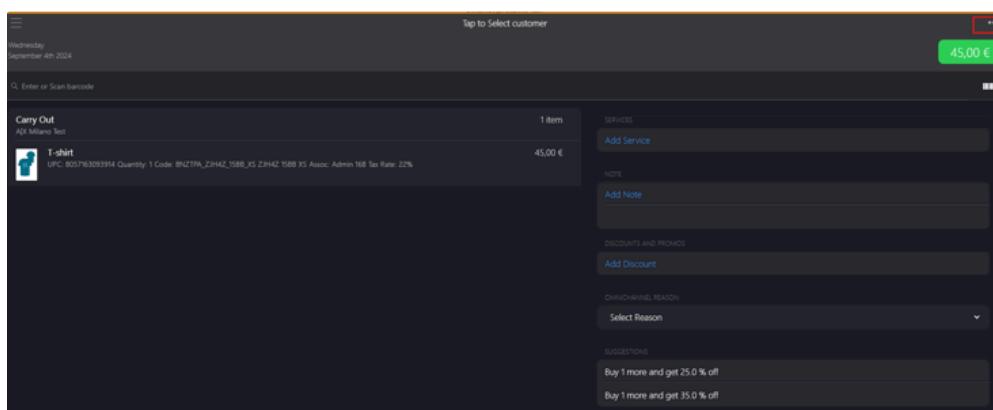
Adding Missing Item

Introduction

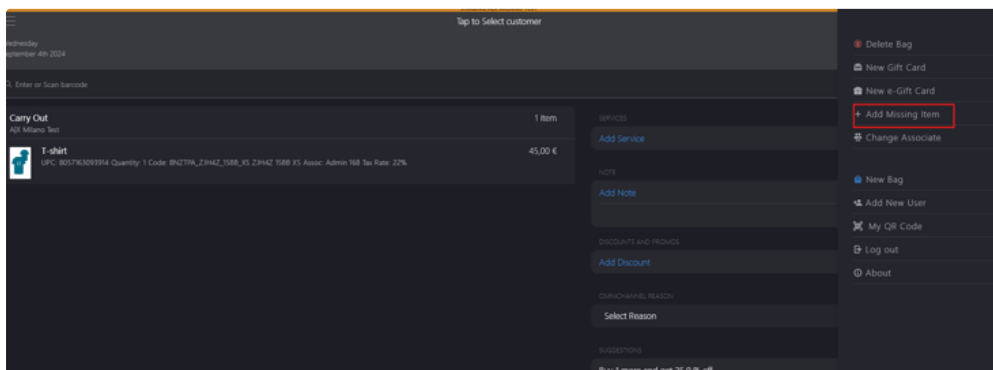
This topic explains the procedure of manually adding missing items to Products.

Steps to Add Missing Item

1. Click the meatballs menu in the upper right corner.



2. Click **+ Add Missing Item**.



3. On the **New Item** page, complete the following fields:

The screenshot shows a mobile application interface for adding a new item. The title bar at the top says 'New Item' with a 'Back' button on the left and a 'Done' button on the right. Below the title bar, there are two main sections: 'REQUIRED INFORMATION' and 'ADDITIONAL INFORMATION'. The 'REQUIRED INFORMATION' section contains three rows: 'Barcode' with a 'Barcode' label on the right, 'Unit Price' with a 'Price' label on the right, and 'Price' with a 'Price' label on the right. The 'ADDITIONAL INFORMATION' section contains five rows: 'Item Name' with a 'Name' label on the right, 'Item Code' with a 'Code' label on the right, 'Item Category' with a 'Select category' dropdown menu on the right, 'Item Subcategory' with a 'Select subcategory' dropdown menu on the right, and 'Media' with a 'Select Media' button on the right.

a. **Required Information** section:

- i. **Barcode:** Enter the unique identifier for the item.
- ii. **Unit Price:** Enter the item price.

b. **Additional Information** section:

- i. **Item Name:** Enter the item name.
- ii. **Item Code:** Enter the item code.
- iii. **Item Category:** Select the item category from the **Select category** dropdown menu.
- iv. **Item Subcategory:** Select the item subcategory from the **Select subcategory** dropdown menu.
- v. **Media:** Click **SelectMedia** to upload the image.

4. Click **Done** to save the item details.

This screenshot is identical to the one above, showing the 'New Item' form. The only difference is that the 'Done' button in the top right corner is highlighted with a red border, indicating it is the next step in the process.

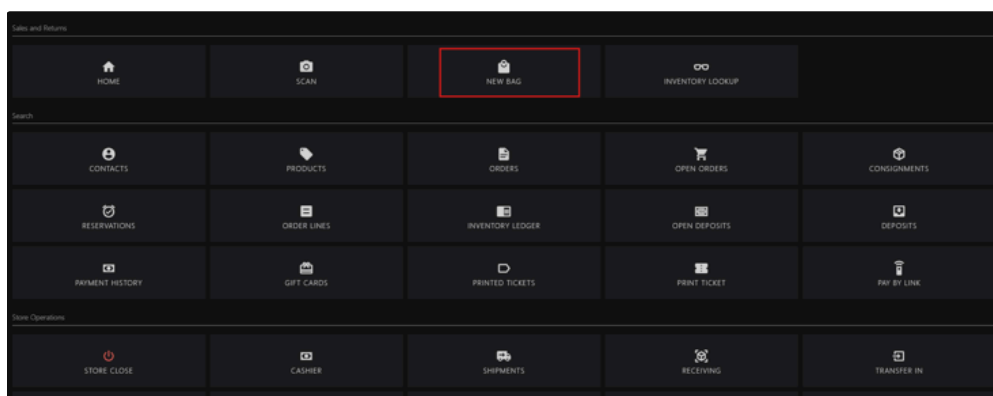
Adding an Existing Customer

Introduction

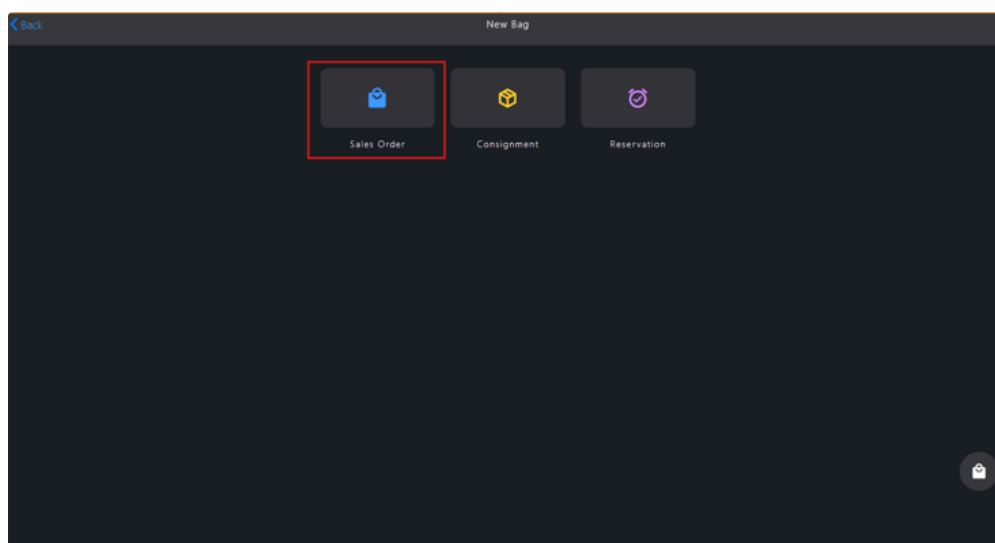
This topic explains the procedure for adding a customer, who is already available in the system, to a sales order.

Steps to Add an Existing Customer to a Sales Order

1. Click **NEW BAG**.



2. Click **Sales Order**.



3. Click **Tap to Select customer**.

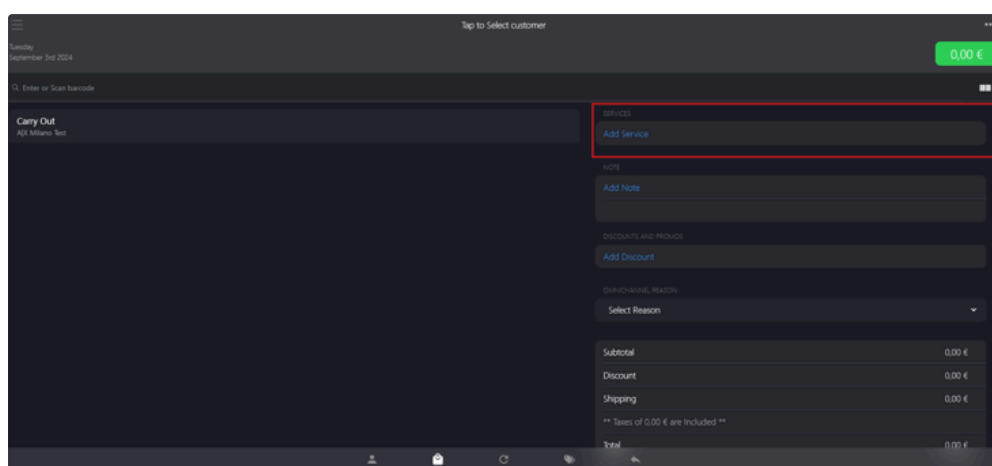
Adding Services

Introduction

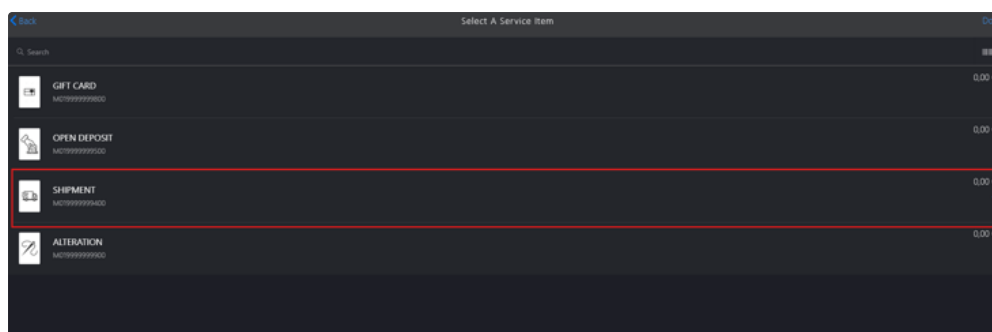
This topic explains the procedure of adding various services, such as shipping, gift cards, open deposits, and alterations, to a sales order.

Steps to Add a Service to a Sales Order

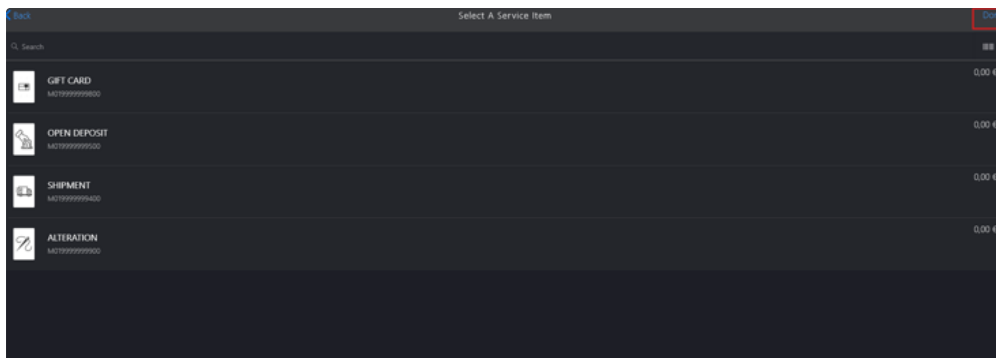
1. In the **SERVICES** section, click **Add Service**.



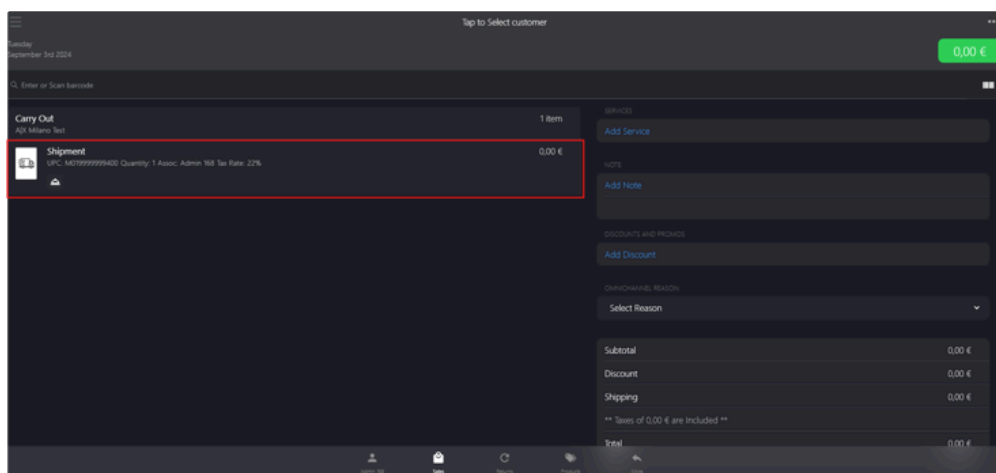
2. Select an appropriate service from the [service list](#) on the **Select A service Item** page, for example, shipment.



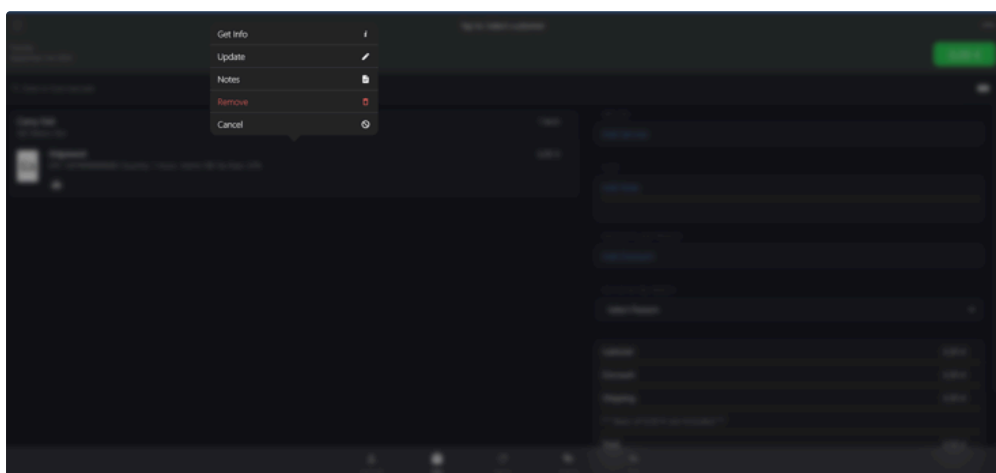
3. Click **Done** to apply the service.



4. Click the applied service on the **Tap to Select customer** page.



5. Select **Remove** from the popup menu to remove the applied service.



Service List Overview

Gift Card

A gift card is a prepaid card that customers can use to purchase products or services. Additionally, gift cards are often used as a convenient gifting option for various occasions.

Open Deposit

This service lets customers pay part of the cost of a product or service upfront. It is beneficial to reserve items or personalize them in advance of their delivery.

Shipment

This service allows customers to have their purchases delivered to their home. Customers have the flexibility to select from various shipping options, such as standard or expedited delivery, each with different associated costs.

Alteration

This service assists customers in customizing their purchases, particularly clothing, to ensure a perfect fit. This involves tailoring or hemming to adjust the size or style of the garments accordingly.

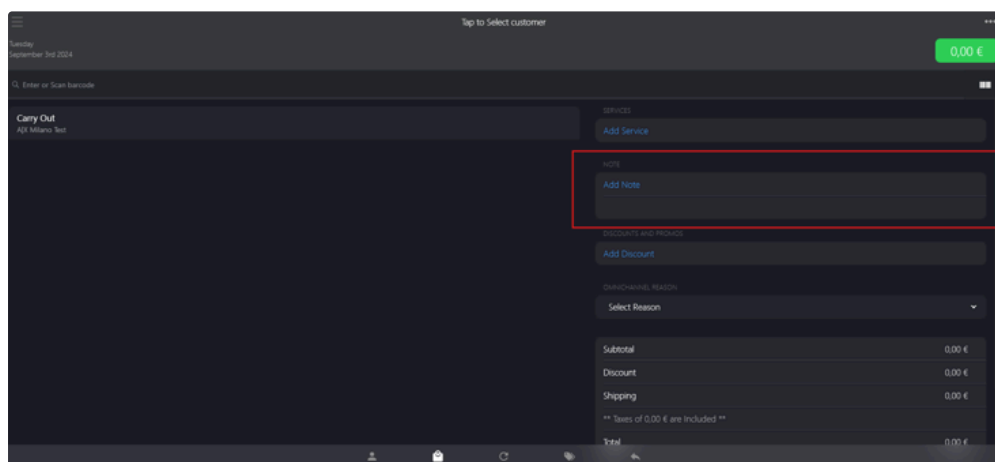
Adding Note

Introduction

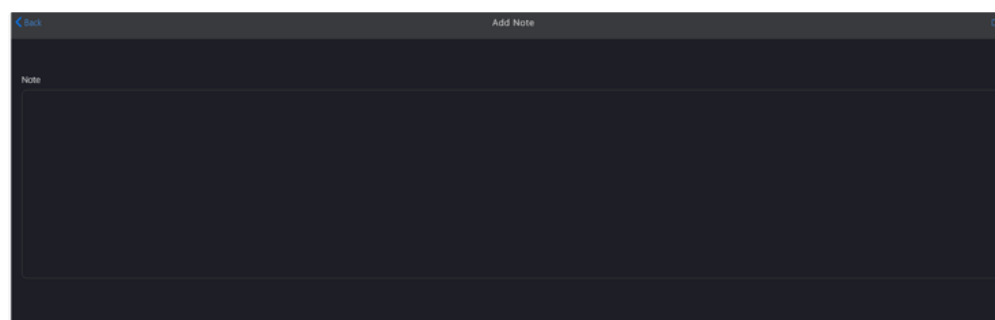
This topic explains the procedure for creating and editing notes within the sales order.

Steps to Creating a Note

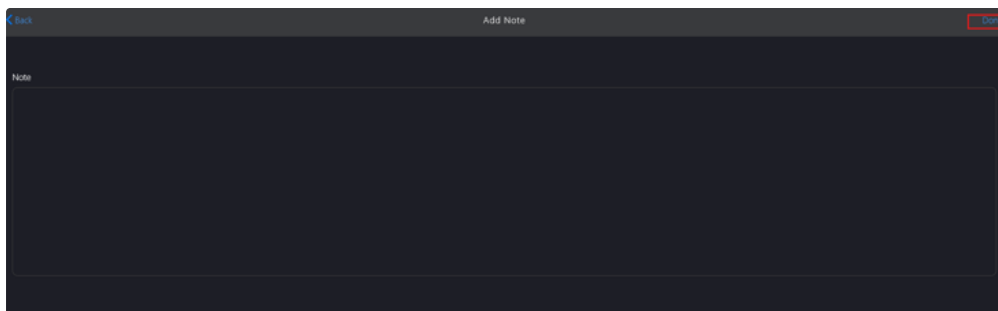
1. In the **NOTE** section, click **Add Note**.



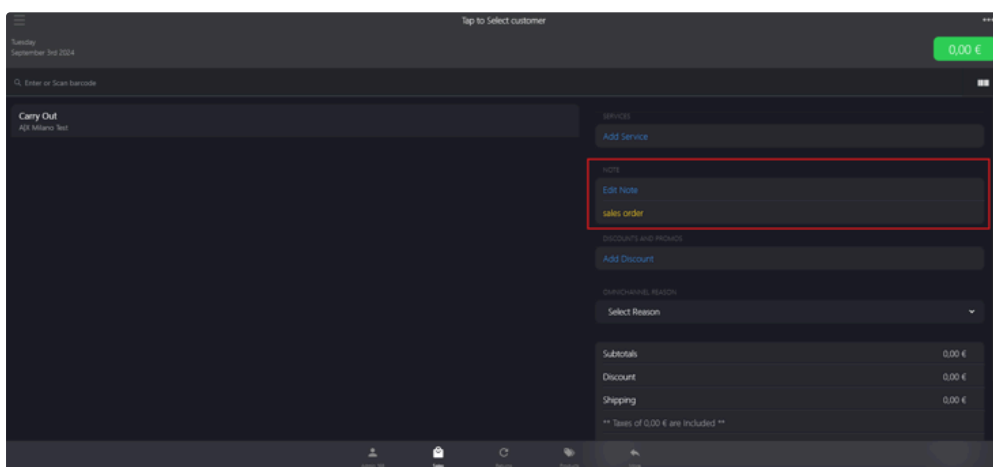
2. Enter the text in the Note field on **Add Note** page.



3. Click **Done** to add the note.



4. Click **Edit Note** to edit the note field.



Adding Discounts and Promotions to the Cart

This section provides various options aimed at elevating customer value and enhancing the shopping experience. By applying percentage discounts or the identification of items as gifts, you have the ability to customize promotions to cater to individual requirements, thereby nurturing customer loyalty and boosting sales.

The following options empower you to provide outstanding service and drive business expansion.

- [Applying Percentage Discount](#)
- [Applying Fixed Discount](#)
- [Applying Promotion](#)
- [Marking Item as a Gift](#)

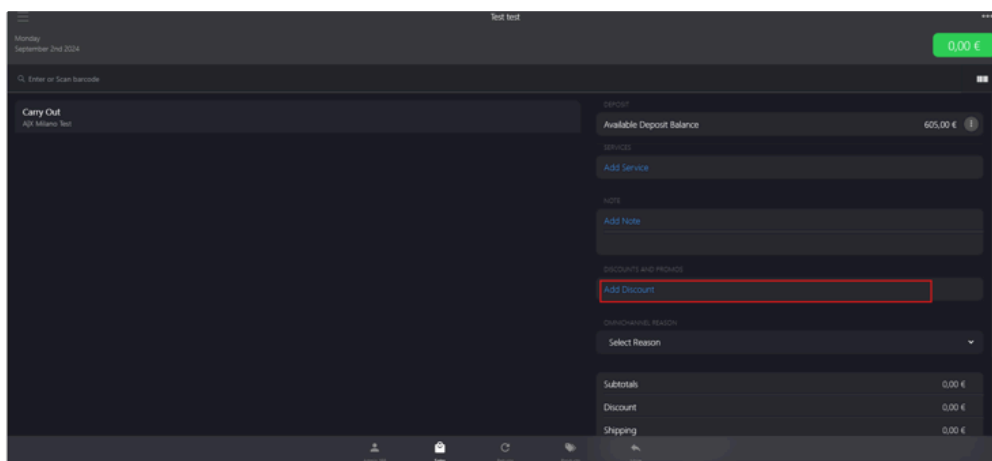
Applying Percentage Discount

Introduction

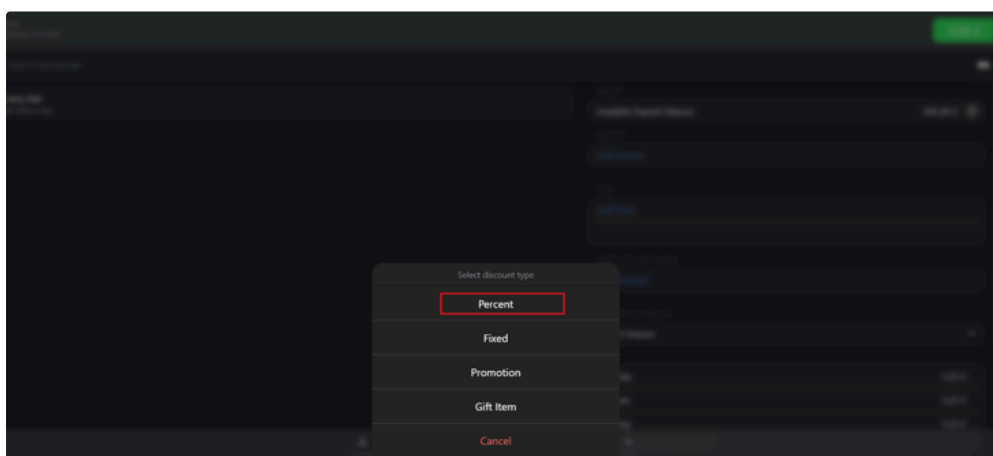
This topic explains the procedure for applying a percentage discount to a sales order.

Steps to Apply Percentage Discount

1. In the **DISCOUNTS AND PROMOS** section, Click **Add Discount**.



2. Select **Percent** from **Select discount type** options.



3. Update the options on the **Percent Discount** page.

Back Percent Discount Done

Reason CRM DISCOUNT ▾

Discount % 0% ▾

Discount Note

Enter Note

ITEMS

Select All

a. **Reason:** Select a relevant reason from the **Select Reason** dropdown menu.

Back Percent Discount Done

Reason Select Reason ▾

Discount %

Discount Note

Enter Note

ITEMS

Select All

- Select Reason
- CRM DISCOUNT
- VIP DISCOUNT
- MALL PASSPORTS
- EGS PRIVATE PROMOTION
- F & F DISCOUNT
- PARTNERS/CORPORATE
- DESIGNER & ARCHITECT
- OUTLET VIP COUPON
- MANAGER DISCOUNT
- GA DISCOUNT
- EMPLOYEE DISCOUNT
- HOLDERS OF MEMBERS CARDS
- PRESS DISCOUNT
- PROMOTIONAL DISCOUNT
- PUBLIC SALES
- MANAGER GIFT RETAIL

b. **Discount%:** Configure the discount percentage from **0%** dropdown menu.

Back Percent Discount Done

Reason Select Reason ▾

Discount % 0% ▾

Discount Note

Enter Note

ITEMS

Select All

- 0%
- 10%
- 20%
- 30%
- 40%
- 50%
- 60%

c. **Discount Note:** Add a note in the corresponding field.

The screenshot shows the 'Percent Discount' screen. At the top, there is a 'Back' button on the left and a 'Done' button on the right. Below the title bar, there are three main sections: 'Reason' with a 'Select Reason' dropdown menu, 'Discount %' with a '0%' dropdown menu, and 'Discount Note' with a text input field labeled 'Enter Note'. At the bottom, there is a 'Items' section with a 'Select All' checkbox and a small white square icon on the right.

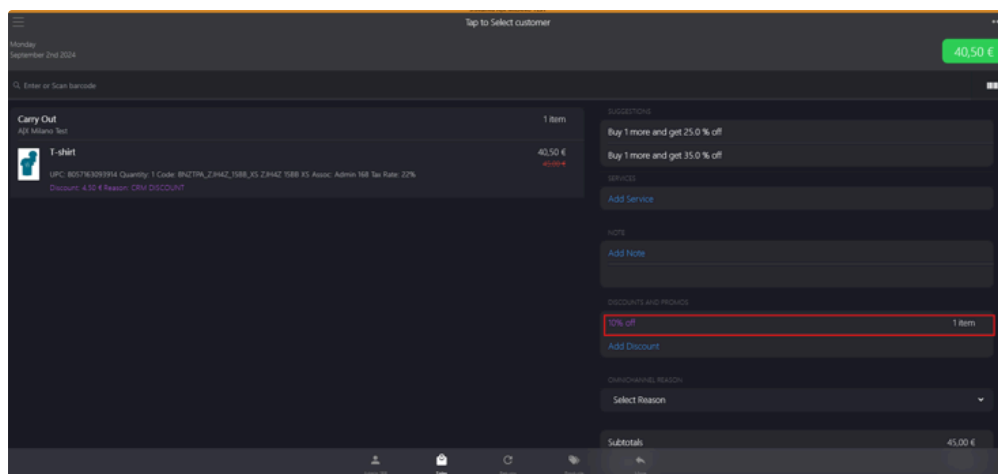
d. Select the **ITEMS** checkbox to which discount is applied.

This screenshot is identical to the previous one, but a red rectangular box highlights the 'Items' section at the bottom of the screen, which contains the 'Select All' checkbox and the small white square icon.

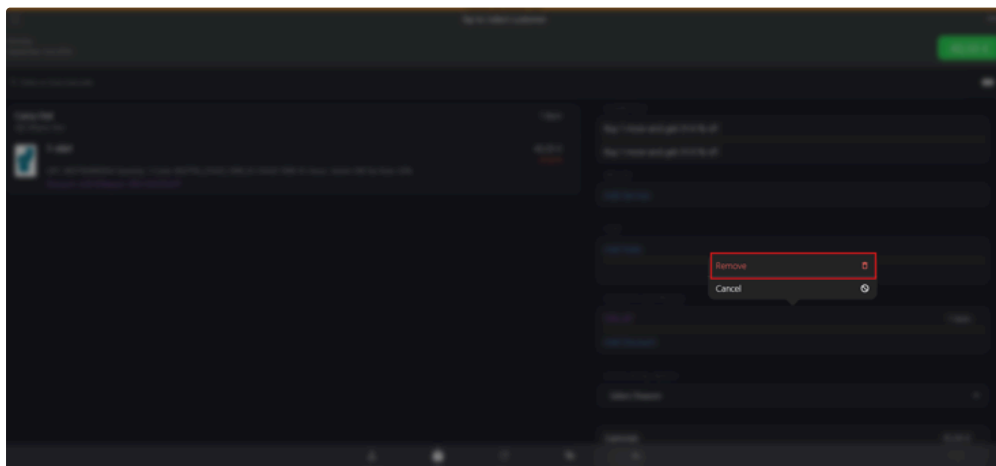
4. Click **Done** to apply the discount.

This screenshot is identical to the previous ones, but a red rectangular box highlights the 'Done' button in the top right corner of the screen.

5. Click the percent discount amount displayed on the **Tap to Select customer** page.



6. Click **Remove** to remove the discount.



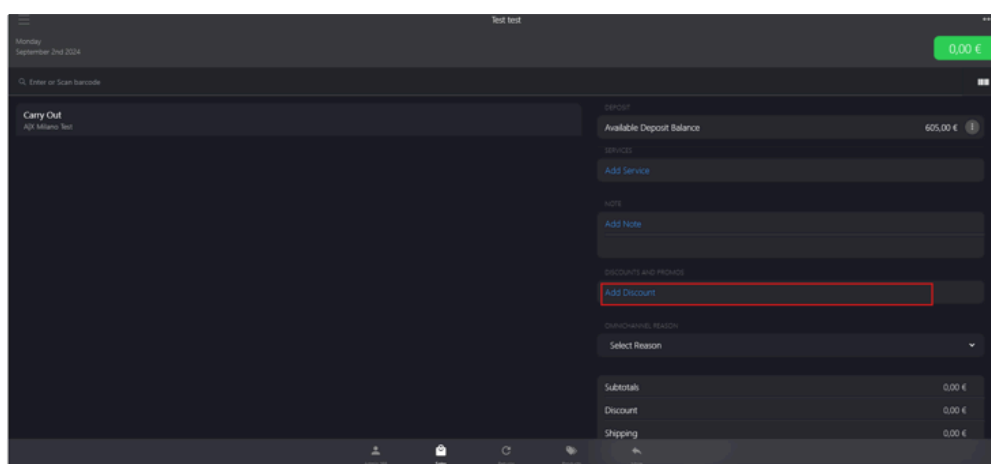
Applying Fixed Discount

Introduction

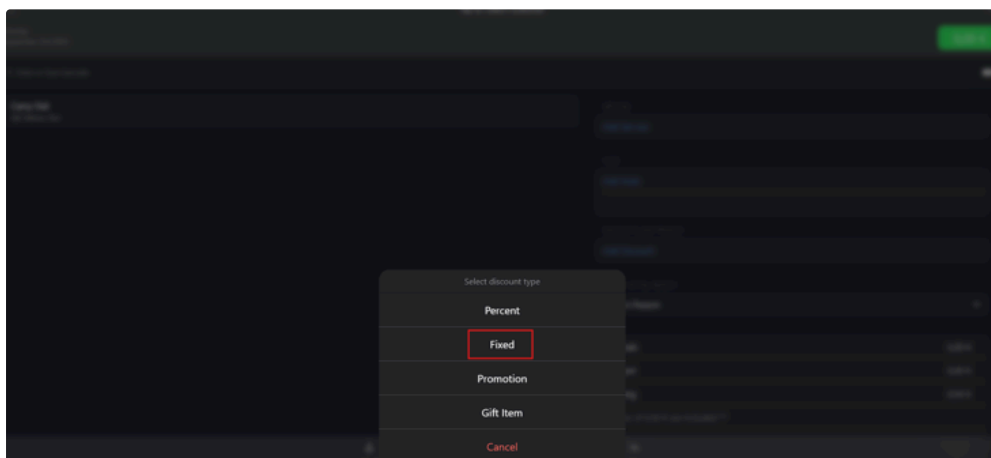
This topic explains the procedure for applying a fixed discount to a sales order.

Steps to Apply Fixed Discount

1. In the **DISCOUNTS AND PROMOS** section, click **Add Discount**.



2. Select **Fixed** from **Select discount type** options.



3. Update the options on the **Fixed Discount** page.

Fixed Discount

Discount type Fixed Price ▾

Amount Enter discount amount

Reason Select Reason ▾

Discount Note Enter Note

ⓘ Fixed Price: Applies a set discount evenly to chosen lines.

ITEMS

Select All

a. **Discount type:** Select the relevant discount type from the dropdown menu.

Fixed Discount

Discount type Fixed Price ▾

Amount Enter discount amount

Reason Select Reason ▾

Discount Note Enter Note

ITEMS

Select All

Fixed Price
Final Price
Line Discount
Total Price

b. **Amount:** Enter the discount amount in the field.

Fixed Discount

Discount type Fixed Price ▾

Amount Enter discount amount

Reason Select Reason ▾

Discount Note Enter Note

ITEMS

Select All

c. **Reason:** Select a relevant reason from the **Select Reason** dropdown menu.

The screenshot shows the 'Fixed Discount' form with the 'Reason' dropdown menu open. The menu lists various discount reasons such as CRM DISCOUNT, VIP DISCOUNT, MALL PASSPORTS, EOS PRIVATE PROMOTION, F & F DISCOUNT, PARTNERS/CORPORATE, DESIGNER & ARCHITECT, OUTLET VIP COUPON, MANAGER DISCOUNT, GA DISCOUNT, EMPLOYEE DISCOUNT, HOLDERS OF MEMBERS CARDS, PRESS DISCOUNT, PROMOTIONAL DISCOUNT, PUBLIC SALES, and MANAGER GIFT RETAIL.

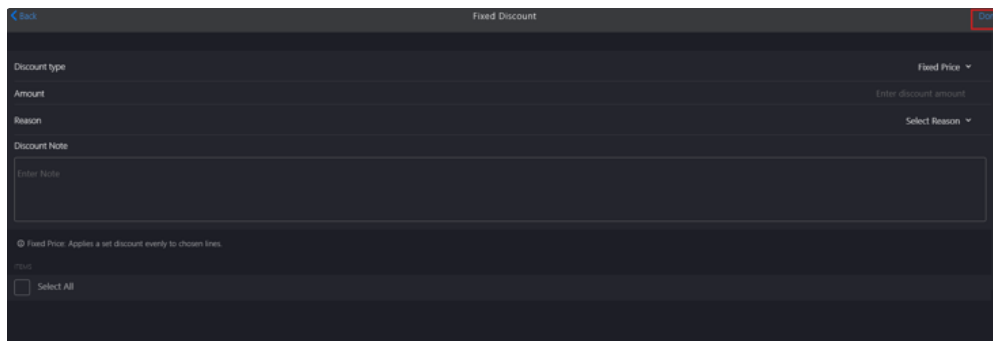
d. **Discount Note:** Add a note in the corresponding field.

The screenshot shows the 'Fixed Discount' form with the 'Discount Note' field highlighted. The field is currently empty and labeled 'Enter Note'.

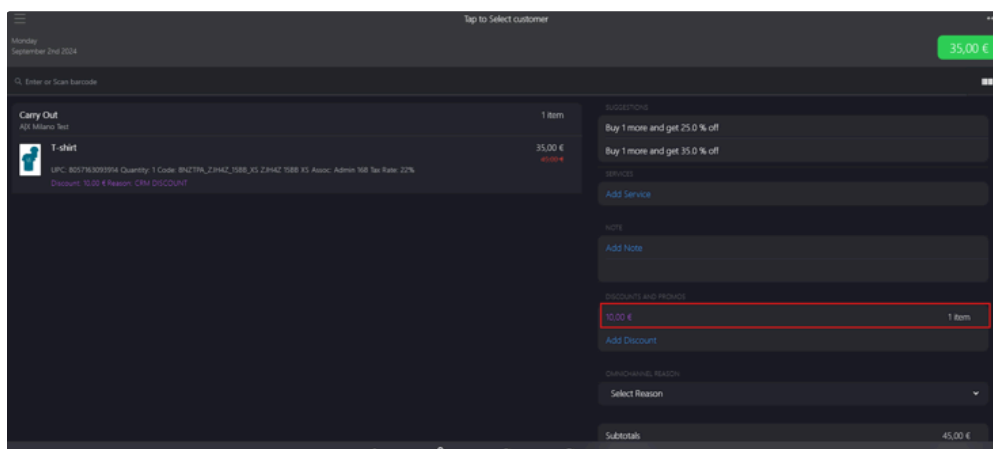
e. Select the **ITEMS** checkbox to which discount is applied.

The screenshot shows the 'Fixed Discount' form with the 'ITEMS' checkbox highlighted. The checkbox is currently unchecked and labeled 'Select All'.

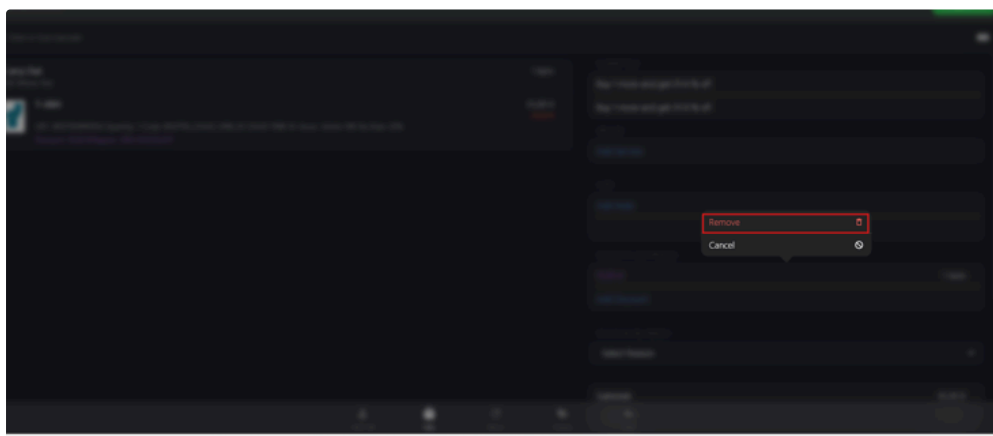
4. Click **Done** to apply the discount.



5. Click the fixed discount amount displayed on the **Tap to Select customer** page.



6. Click **Remove** to remove the discount.



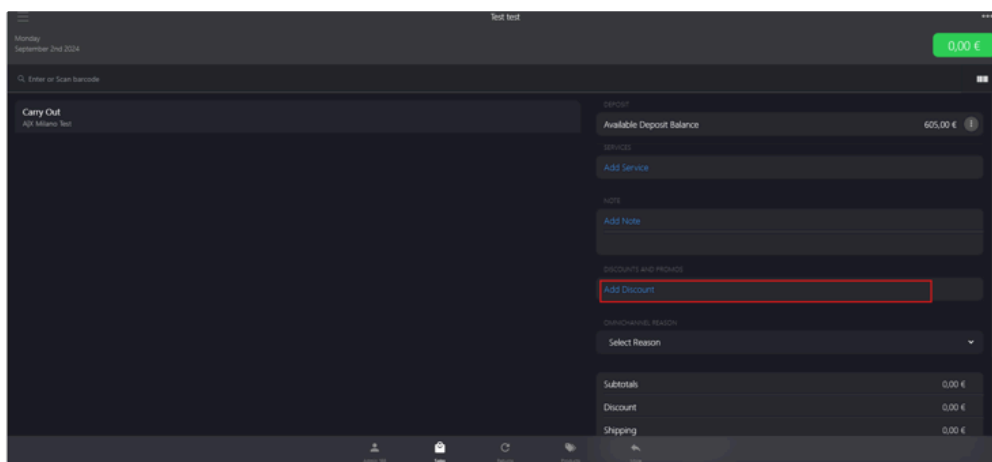
Applying Promotion

Introduction

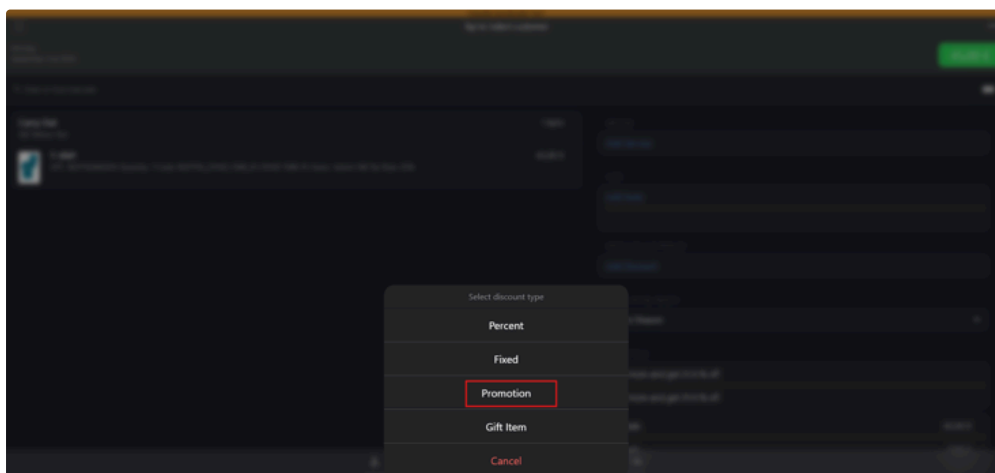
This topic explains the procedure for applying a promotion to a sales order.

Steps to Apply Promotion

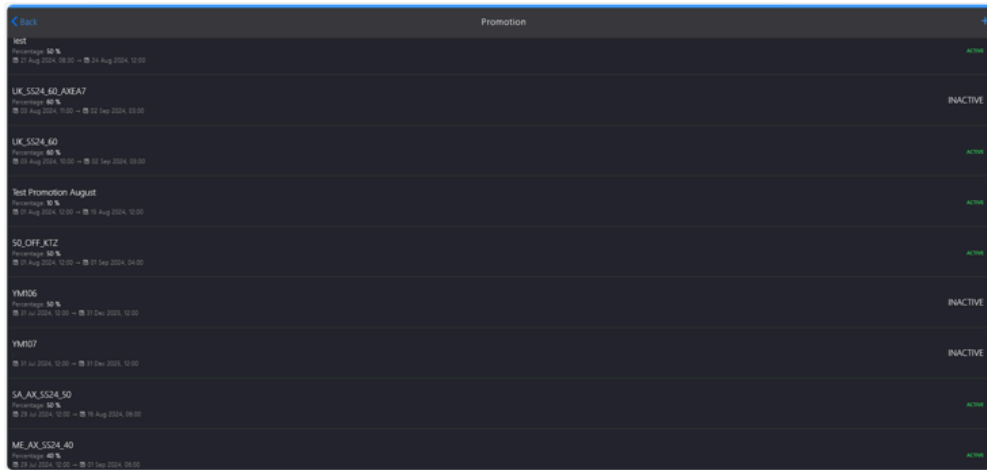
1. In the **DISCOUNTS AND PROMOS** section, click **Add Discount**.



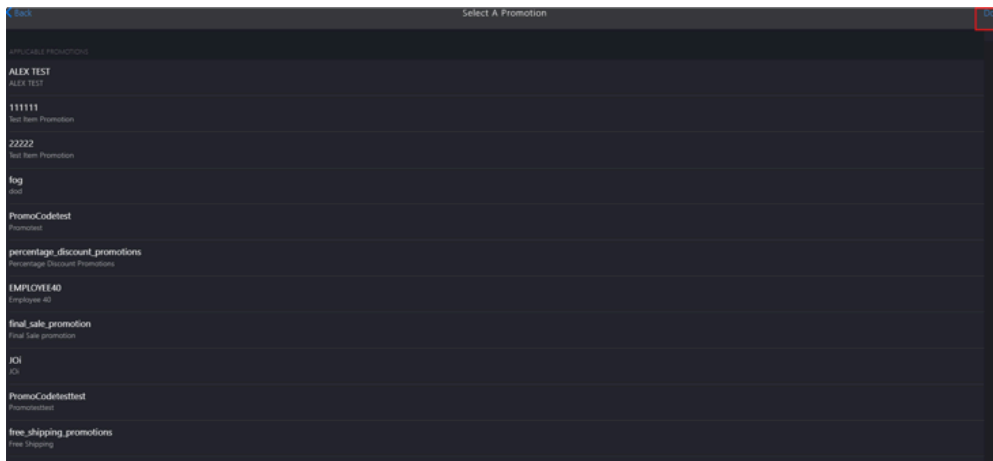
2. Select **Promotion** from **Select discount type** options.



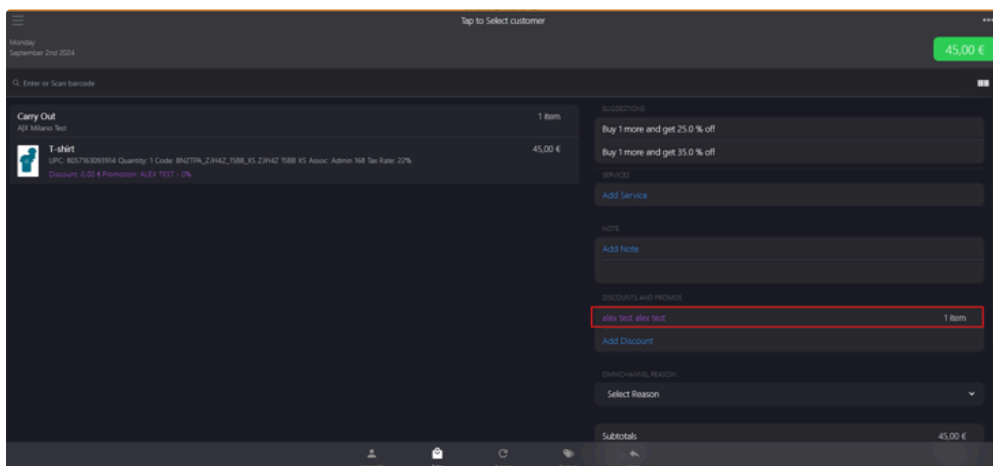
3. Select an active promotion from the list on the **Promotion** page.



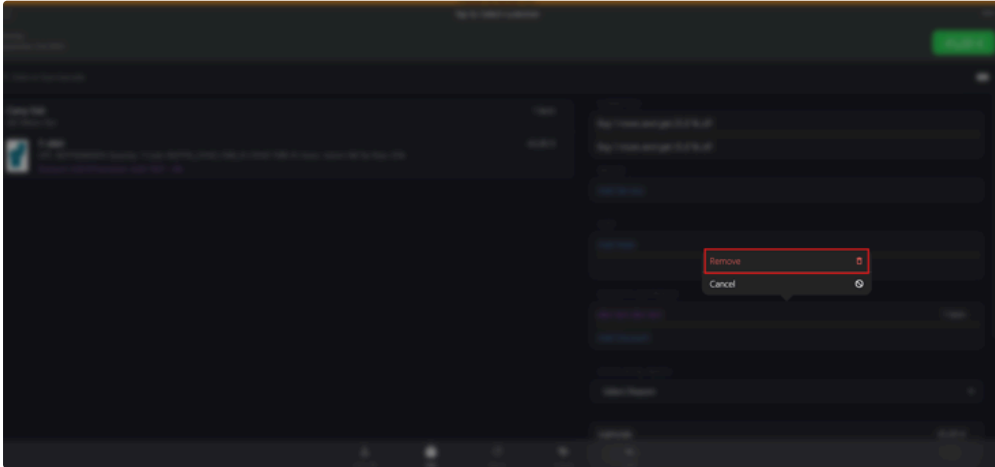
4. Click **Done** to apply the promotion.



5. Click the applied promotion on the **Tap to Select customer** page.



6. Click **Remove** to remove the promotional discount.



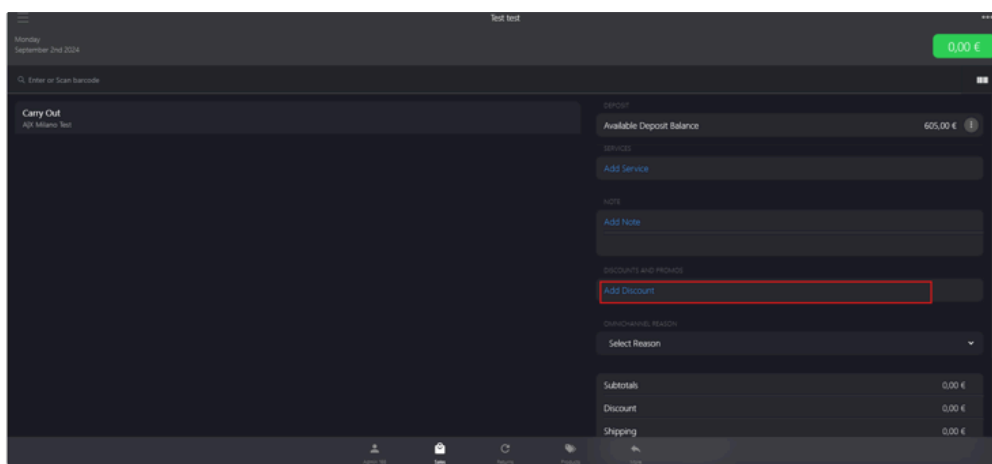
Marking Item as a Gift

Introduction

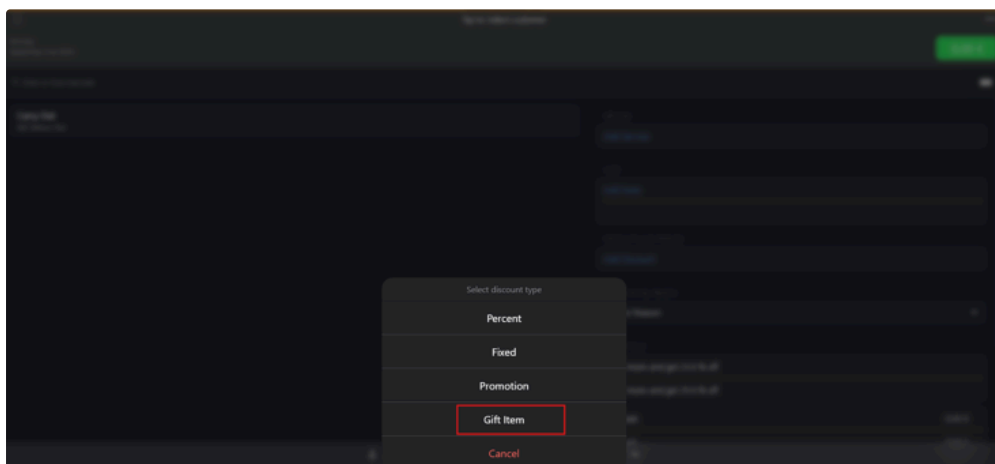
This topic explains the procedure for marking an item as a gift to a sales order.

Steps to Mark Item as a Gift

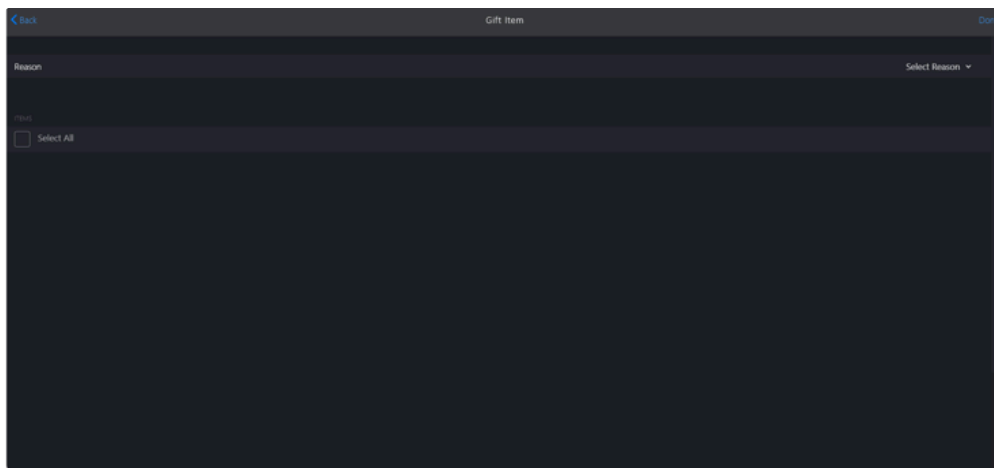
1. In the **DISCOUNTS AND PROMOS** section, click **Add Discount**.



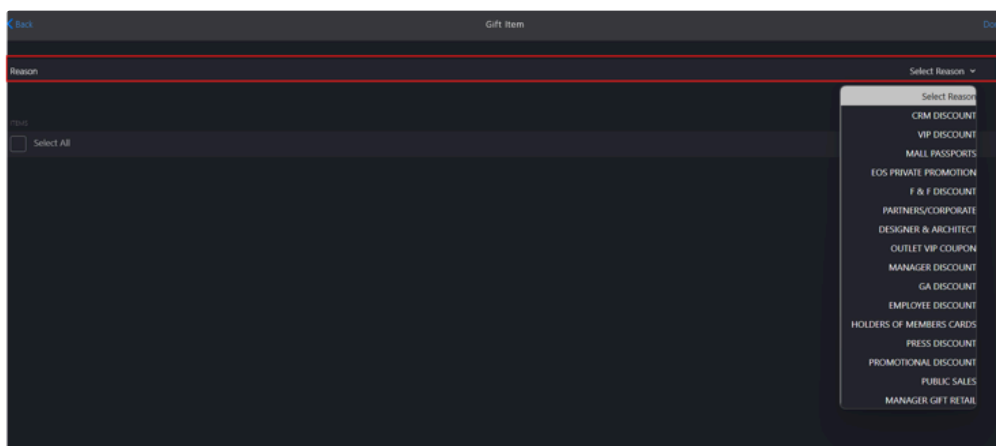
2. Select **Gift Item** from **Select discount type** options.



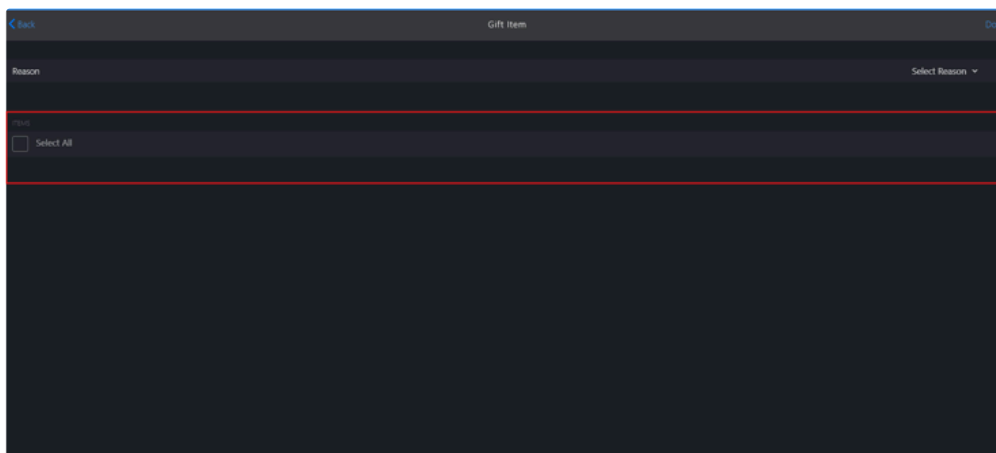
3. Update the options on the **Gift Item** page.



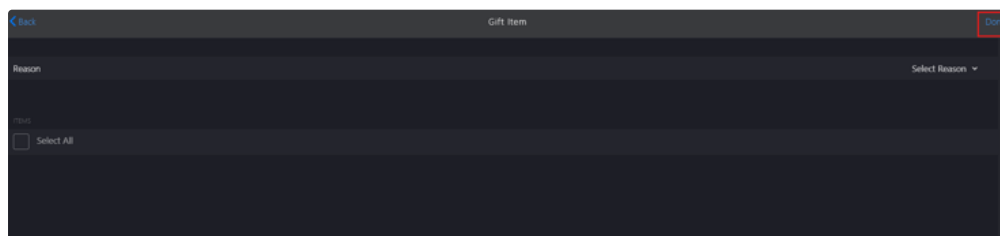
a. **Reason:** Select a relevant reason from the **Select Reason** dropdown menu.



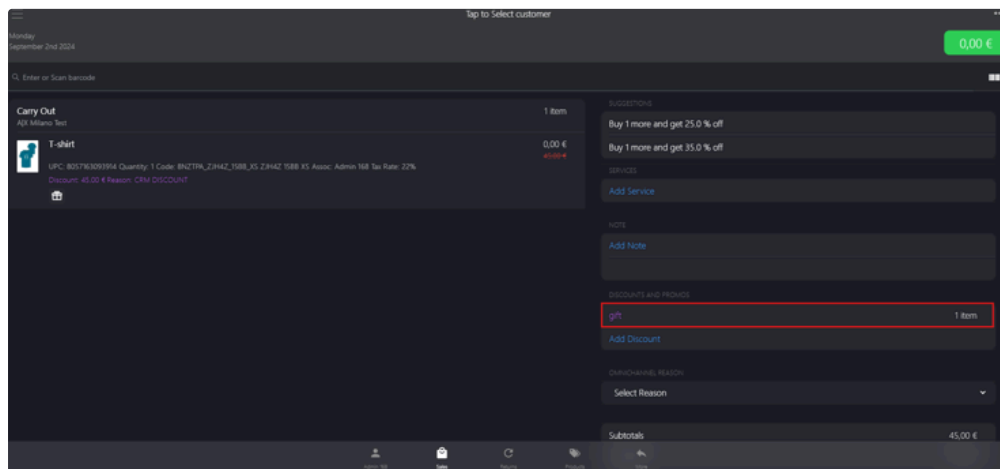
b. Select the **ITEMS** checkbox to which discount is applied.



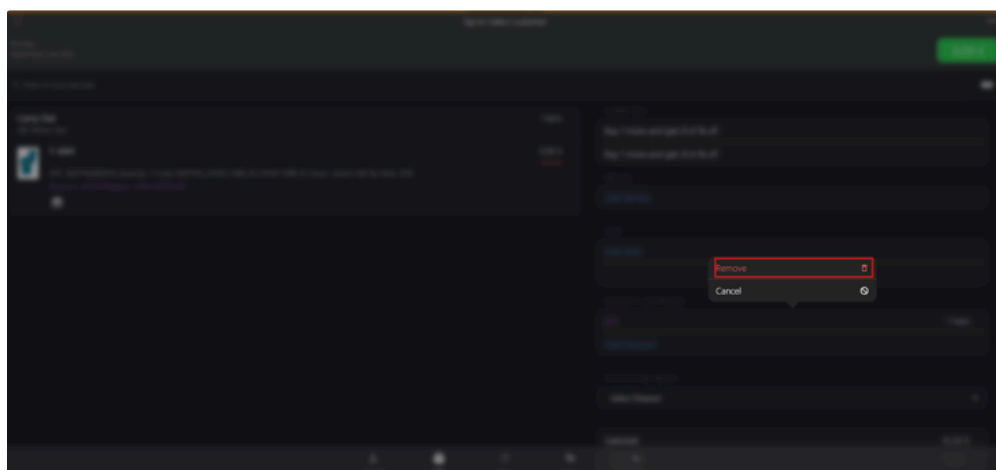
4. Click **Done** to apply the discount.



5. Click the applied gift discount on the **Tap to Select customer** page.



6. Click **Remove** to remove the gift discount.



OMNICHANNEL REASON Overview

Omnichannel reasons encompass the diverse ways customers can interact with an SA or GM across various channels. This strategic approach seeks to provide a consistent and unified experience for customers.

The range of options includes:

1. **MTM APPOINTMENT:** This feature pertains to a Made-to-Measure appointment, offering customers the opportunity to acquire personalized clothing that fits them perfectly. This service is accessible both in-store and online, based on the retailer's offerings.
2. **CLICK AND RESERVE:** This feature enables customers to choose an item online and reserve it for in-store pickup, offering convenience to customers who wish to secure availability without the need to make an immediate purchase commitment.
3. **RETURN IN STORE:** This is a conventional return option allowing customers to return a purchased item to the physical store for a refund or exchange.
4. **CHAT WITH A STORE:** This feature enables customers to engage in real-time communication with a store representative via chat, accessible on the retailer's website or through a messaging application. It serves as a platform for addressing inquiries, seeking assistance, or processing returns efficiently.
5. **PICK-UP IN STORE:** This feature is akin to "Click and Reserve," enabling customers to place orders online and collect their purchases in-store at their convenience.
6. **BOOK AN APPOINTMENT:** This feature is suitable for scheduling appointments for services such as alterations, consultations, or other in-store experiences.
7. **E-COMMERCE HARRODS:** This feature indicates a specific e-commerce platform associated with Harrods.

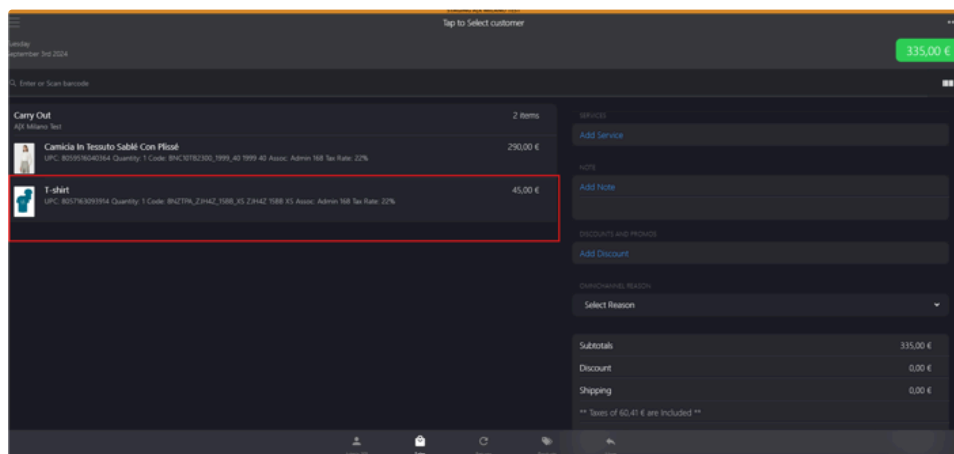
Updating Item Price

Introduction

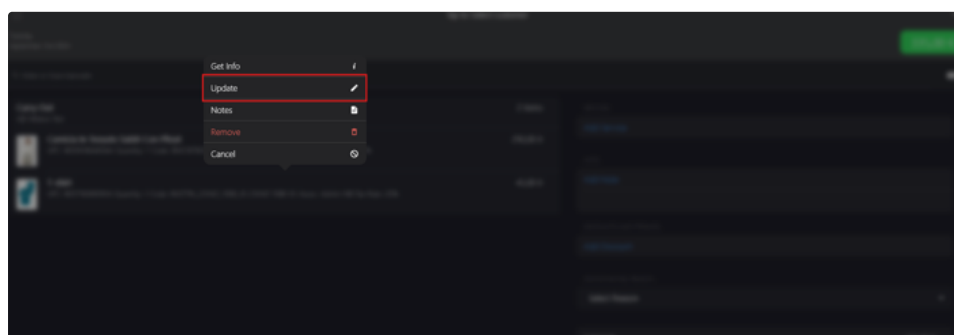
This topic outlines the process for updating the price of an item.

Steps to Updating Item Price

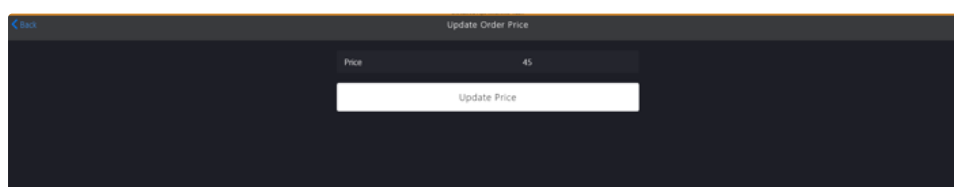
1. Click the item for which you want to update the price.



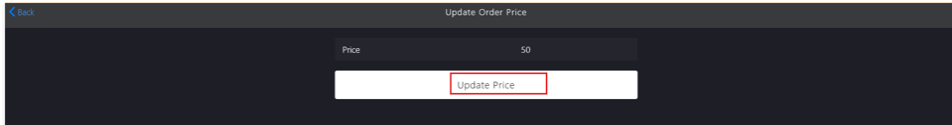
2. Select **Update** from the pop-up menu.



3. Enter the new price in the **Price** field on the **Update Order Price** page.



4. Click **Update Price** to apply the change.



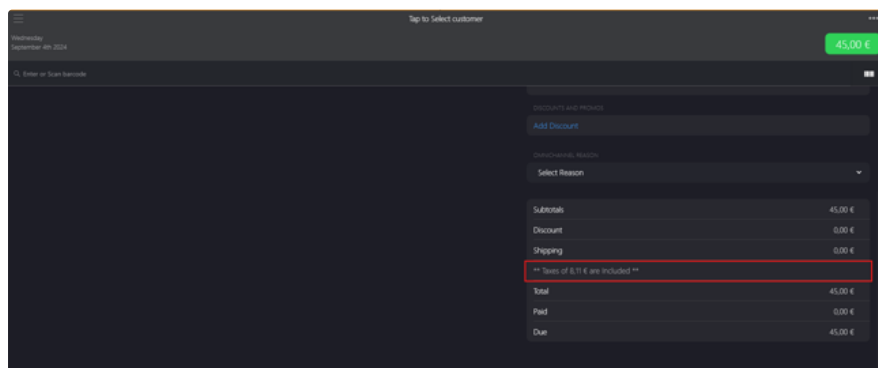
Applying Tax Exemption

Introduction

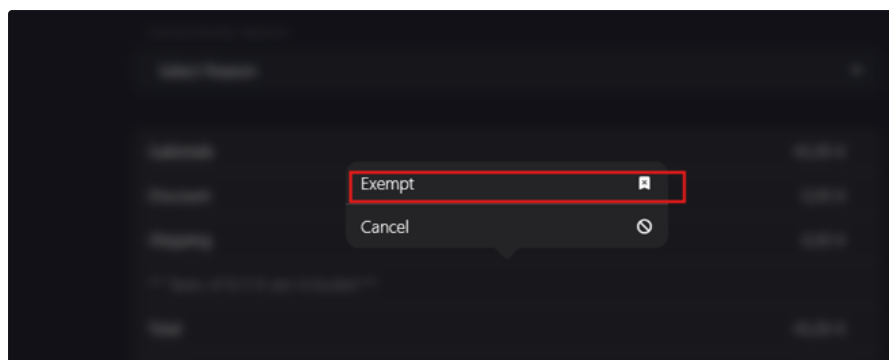
This topic explains the procedure for applying tax exemption in a sales order.

Steps to Apply for Tax Exemption

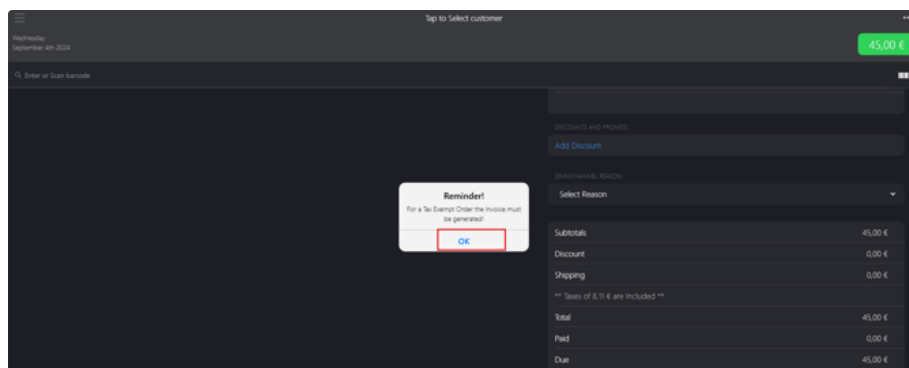
1. Click the **Taxes** field.



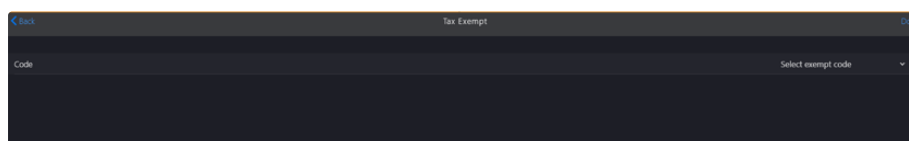
2. Select **Exempt** from the pop-up menu.



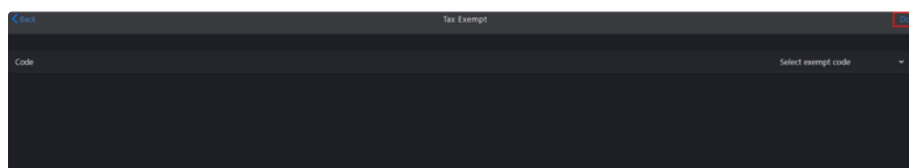
3. Click **OK** on the dialog box.



4. On the Tax Exempt page, select a appropriate **Code** from **Select exempt code** dropdown menu.



5. Click **Done** to apply tax exemption changes.



Changing Associate

This section covers the procedure of changing associate before and after scanning an item during sales order creation.

- [Changing Associate Before Scanning](#)
- [Changing Associate After Scanning](#)

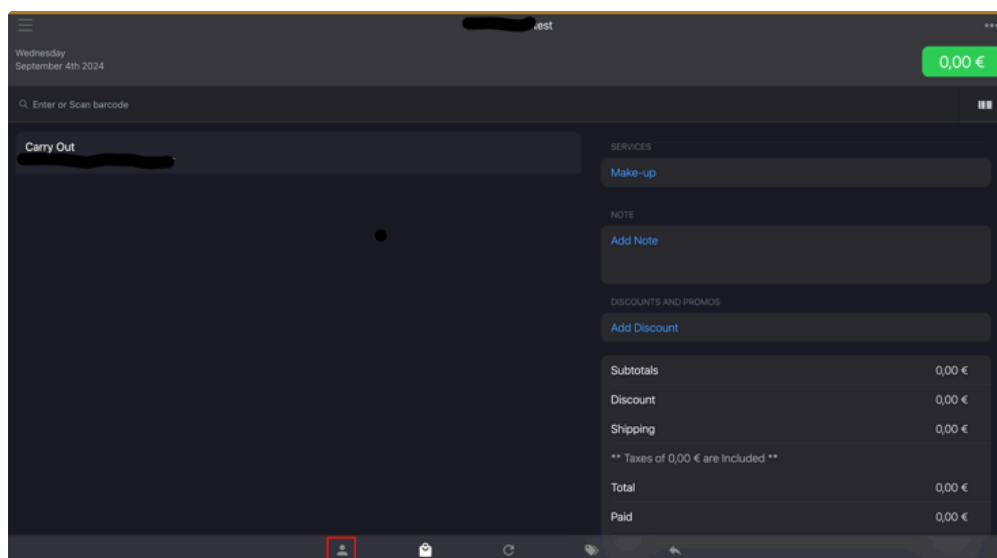
Changing Associate Before Scanning

Introduction

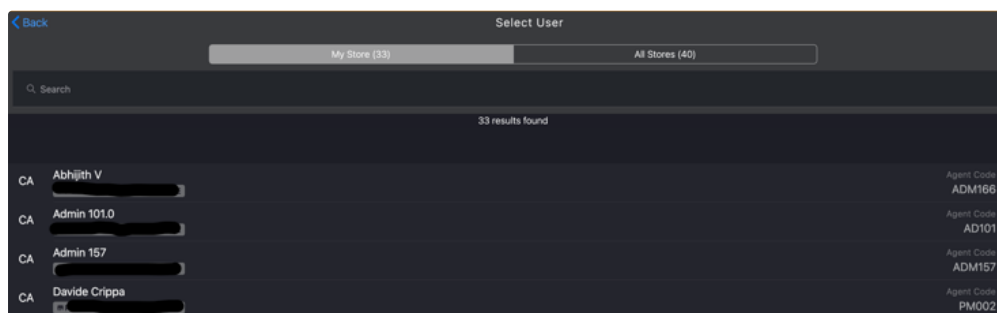
This topic explains the procedure of changing an associate before initiating the scanning procedure.

Steps to Change Associate Before Initiating the Scanning

1. Click the associate name icon on the bottom bar.



2. On the **Select User** page, select the desired associate from the list.



3. Verify that associate name icon in the bottom bar displays the newly assigned associate's name.

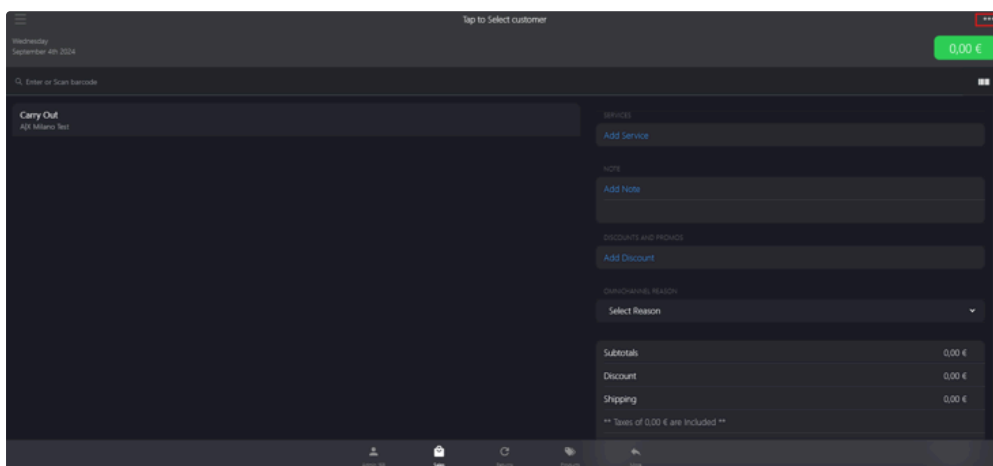
Changing Associate After Scanning

Introduction

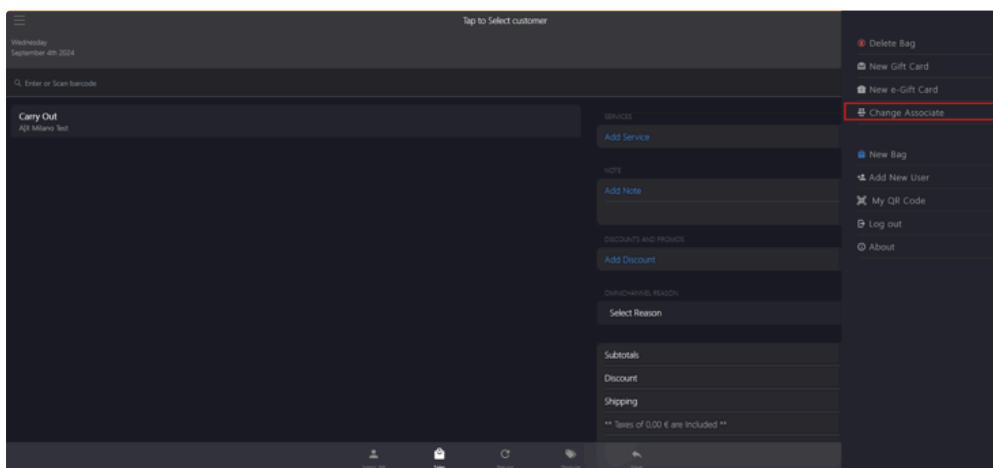
This topic explains the procedure of changing associate after scanning the items to the cart.

Steps to Change Associate After Scanning

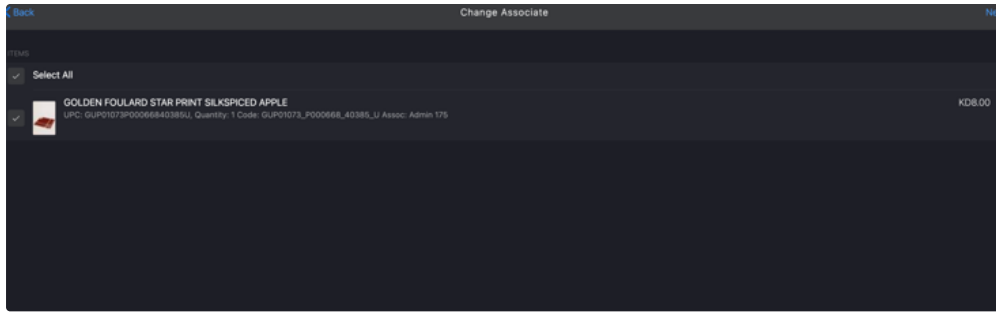
1. Click the meatballs menu.



2. Select **Change Associate**.



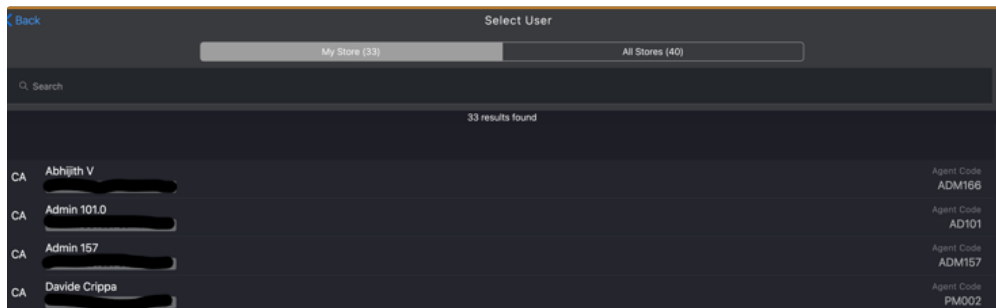
3. On the Change Associate page, select the **Select ALL** or the desired item checkbox.



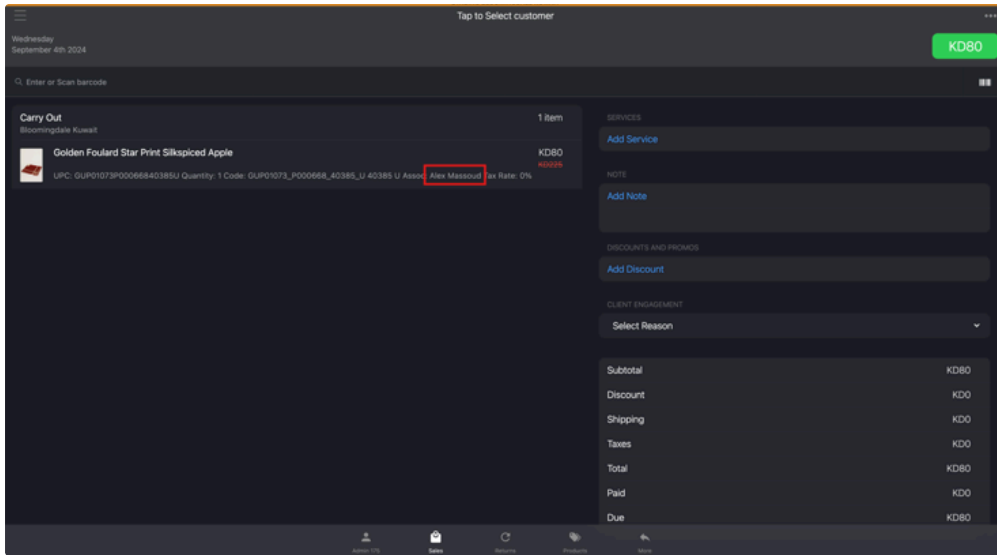
4. Click **Next**.



5. On the **Select User** page, select the desired associate from the list.



6. Verify that selected items are now assigned to the new associate.



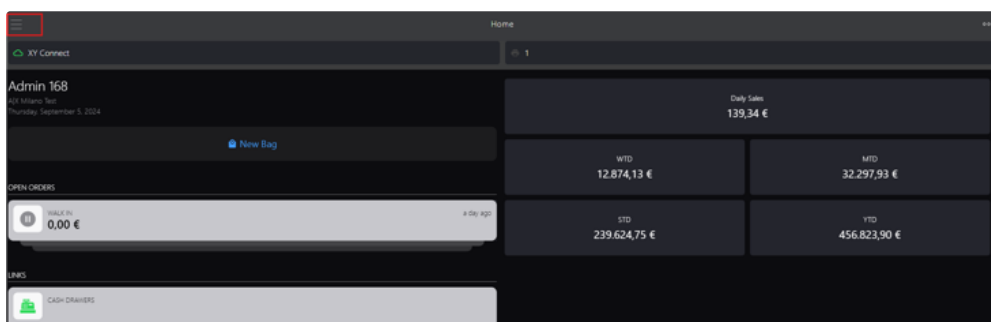
Deleting an Open Sales Order

Introduction

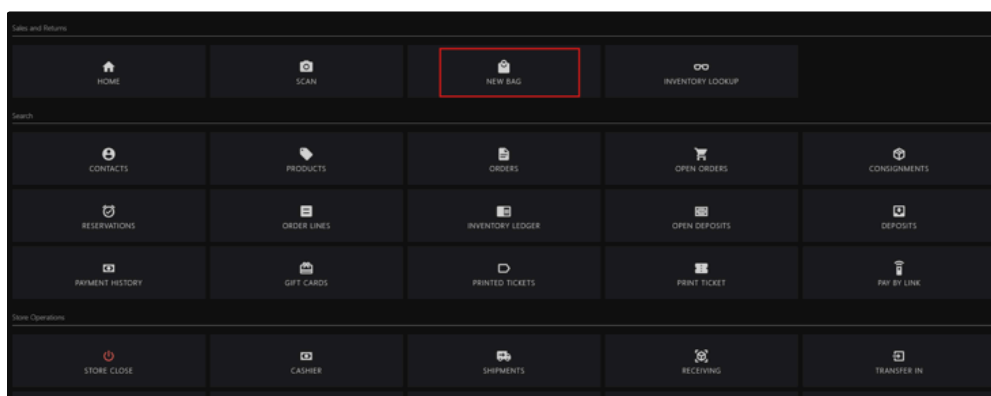
This topic explains the procedure for deleting an open sale order.

Steps to Delete a Sales Order

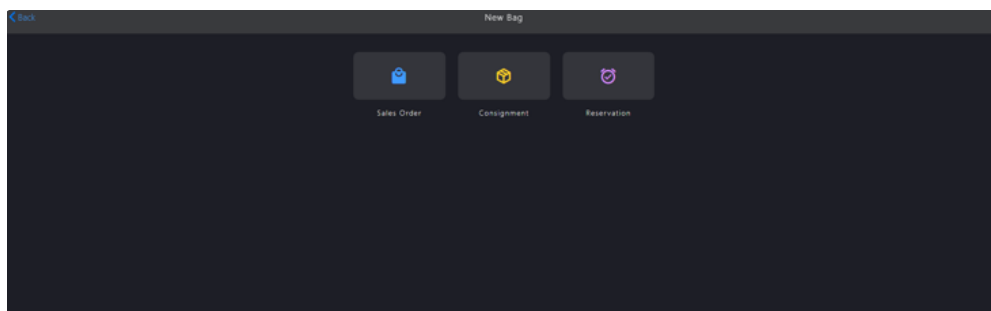
1. Click the burger menu.



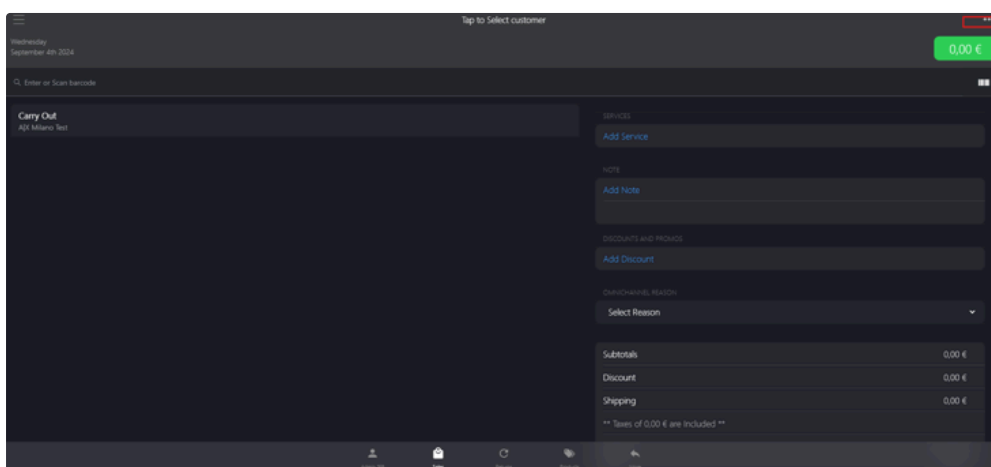
2. Click **NEW BAG**.



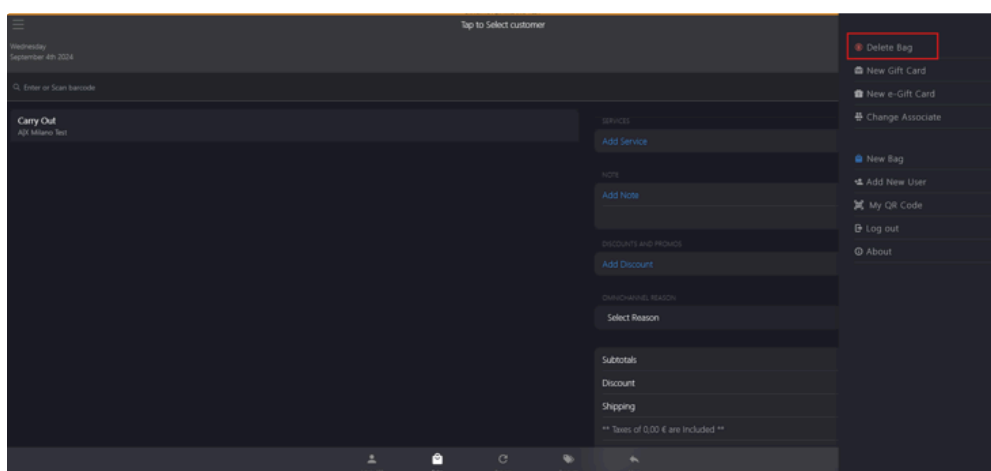
3. Click **Sales Order**.



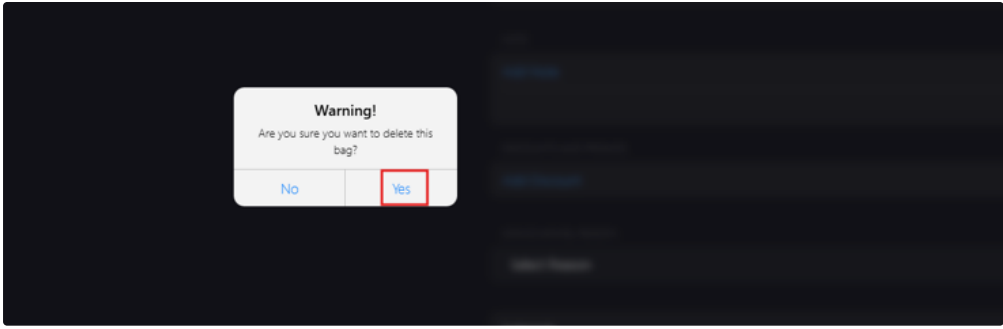
4. Go to meatballs menu.



5. Click **Delete Bag**.



6. Click **Yes** on the dialog box.



Return Order

A return order involves the transaction in which a customer sends an item back to the supplier after receiving the item.

Return Reasons:

- **Defective or Damaged Items:** The customer received product(s) that are defective or damaged from freight.
- **Incorrect Items:** The customer received an item that did not match with the original order.
- **Unsatisfactory Quality:** The customer received items that did not meet expected standards.
- **Change of Preference:** The customer decides to return the items due to a change in preference or need.

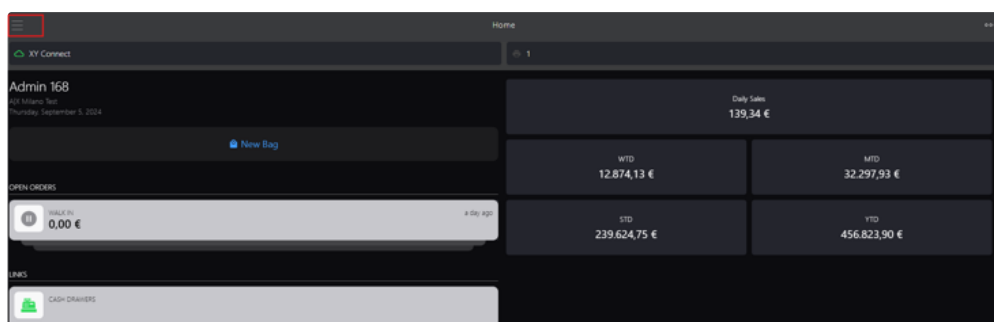
Returning an Order

Introduction

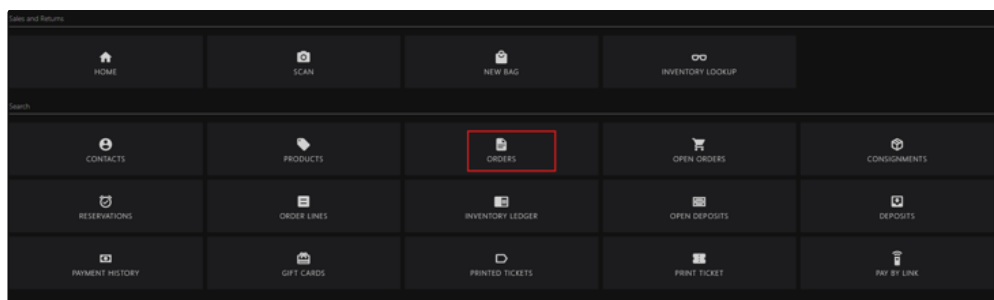
This topic explains the procedure for initiating a return process if a customer desires to return an order.

Steps to Return an Item in the Order

1. Click the burger menu.

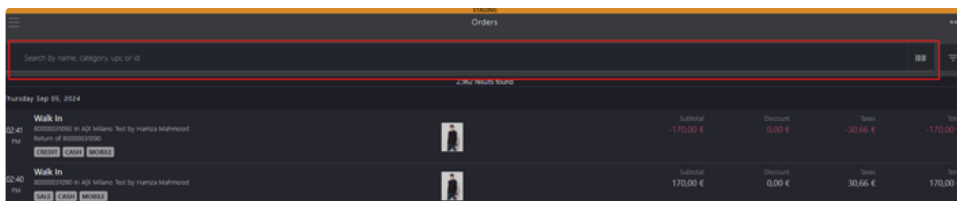


2. Click **ORDERS**.



3. You can search the order id using following options:

- a. For an order with reference, initiate new search in the search box:

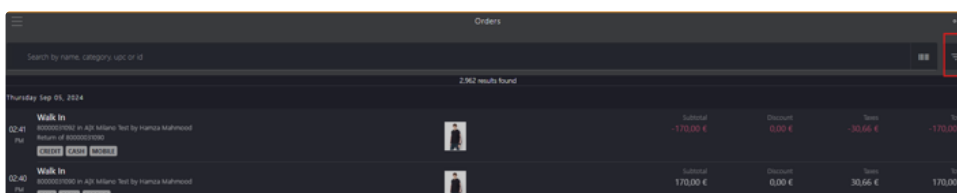


i. Enter the following keywords:

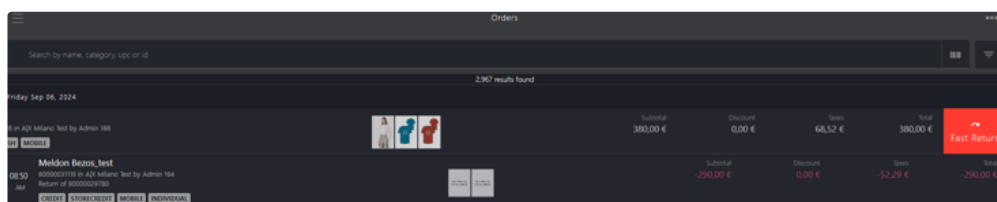
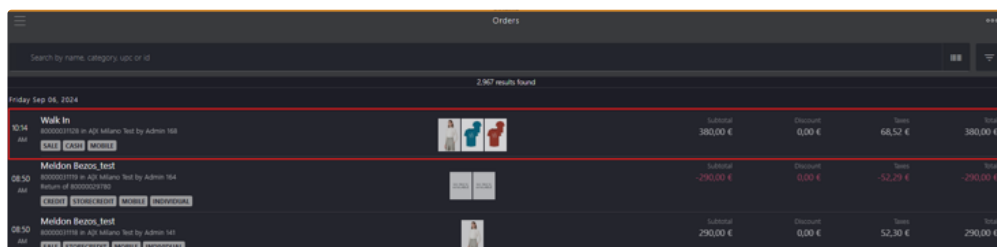
- name
- category
- upc
- id

ii. Scan the order barcode

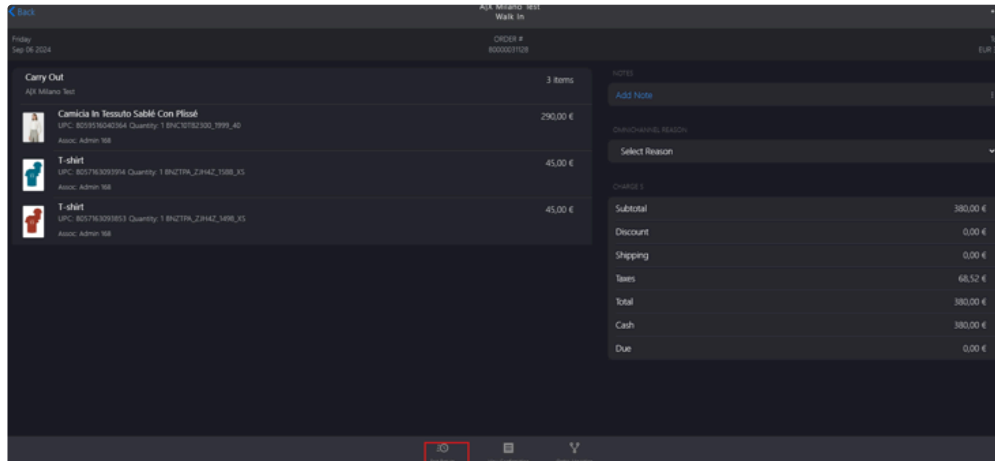
b. [For an order without reference, use the integrated filters at the upper right corner.](#)



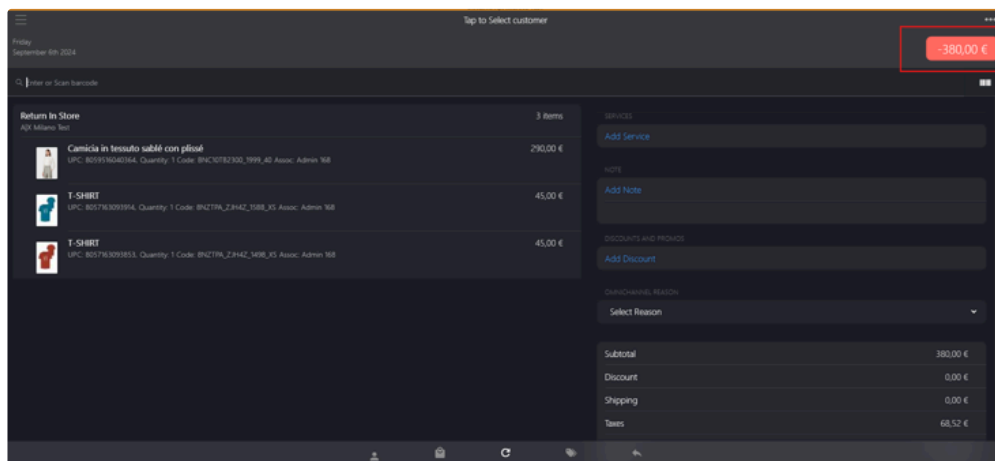
4. Click the order, or alternatively, swipe the order to the left to access **Fast Returns**.



5. Click **Fast Return** in the bottom bar on the store page.

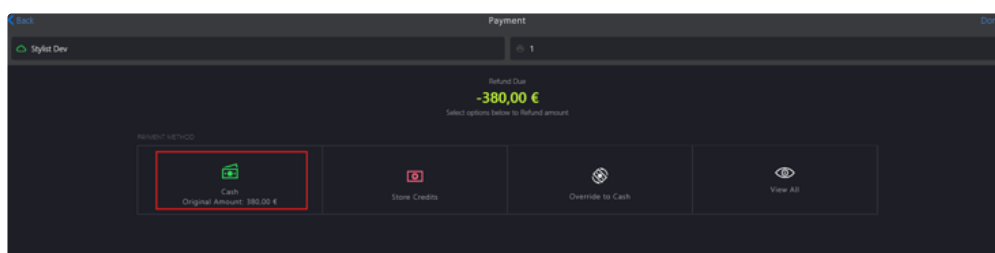


6. Click the red button located in the upper right corner in the **Returns** tab.

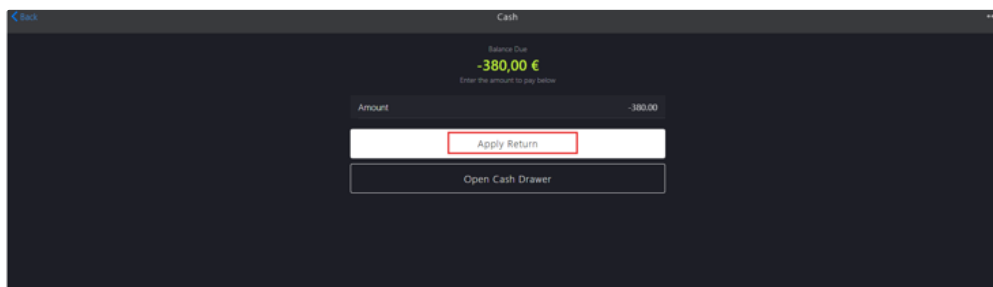


7. Select the preferred payment options.

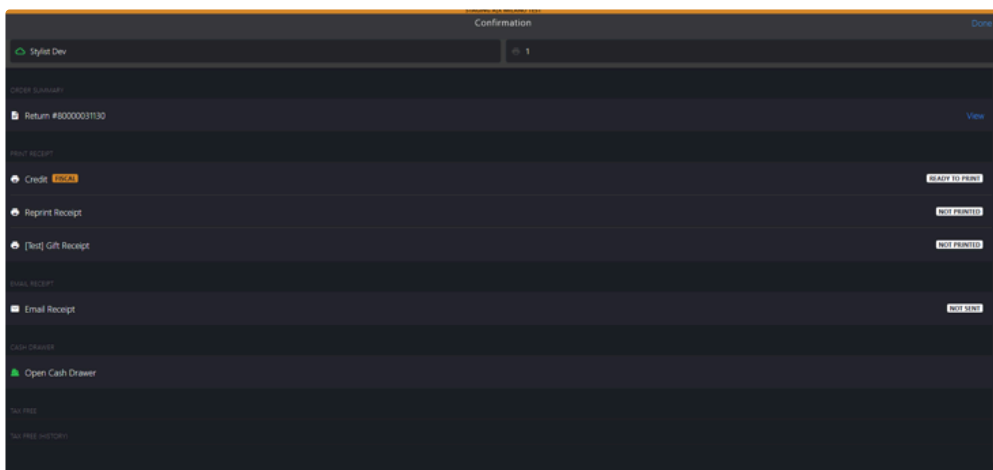
Note: CASH option has been selected in this scenario.



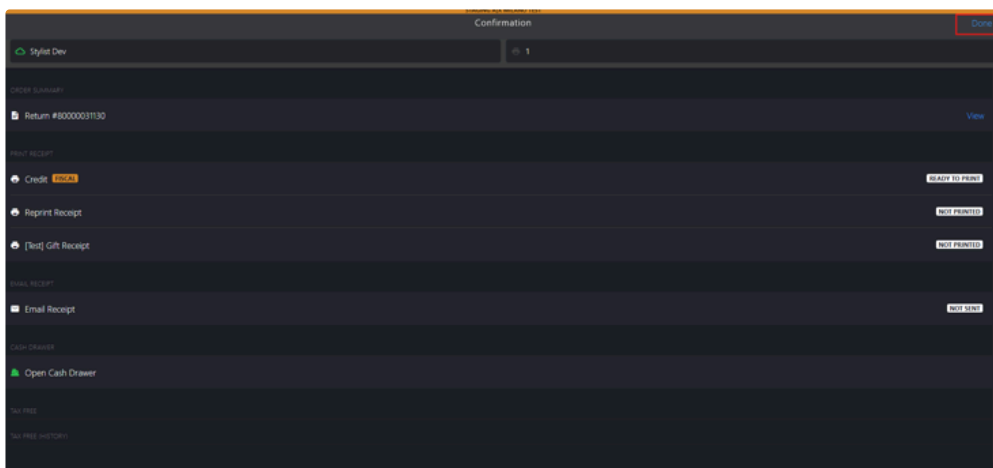
8. Click **Apply Return**.



9. You will be directed to the **Confirmation** page where you can print the receipts.



10. Click **Done** to complete the return transaction.



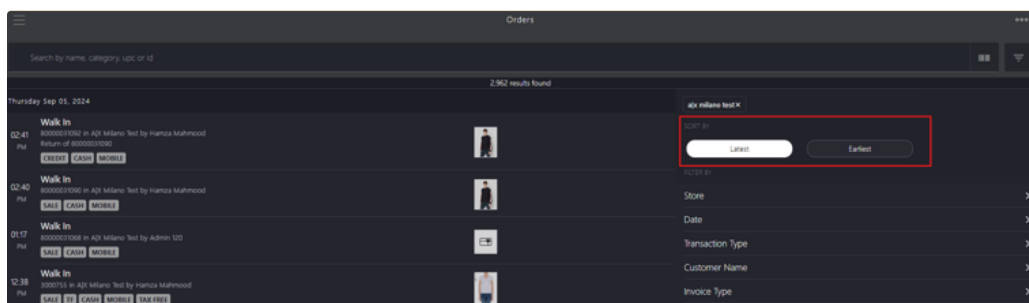
Built-in Filter Search

Introduction

Built-in filters enhance the search experience with the drop-down menu filter category. You can tailor and sort the results to meet your precise requirements by selecting and applying specific criteria.

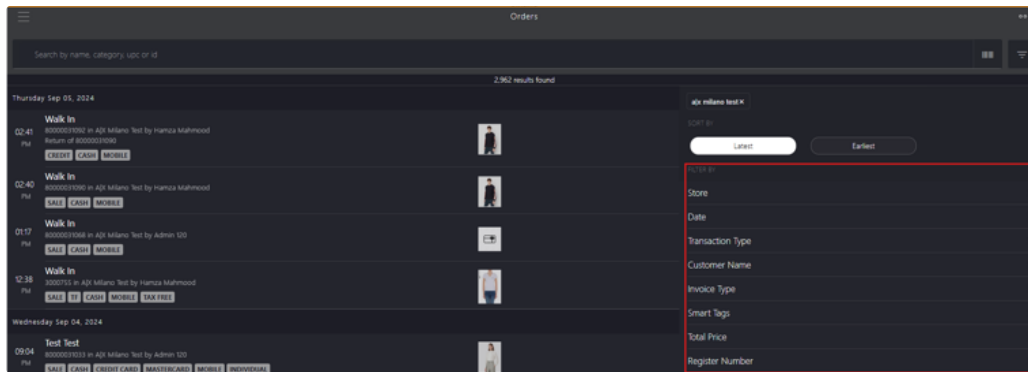
Filter Features

Sorting



Sorting Criteria	Description
Latest	Select the Latest option to view orders from the most recent date to the oldest.
Earliest	Select the Earliest option to view orders from the oldest date to the most recent.

Filter

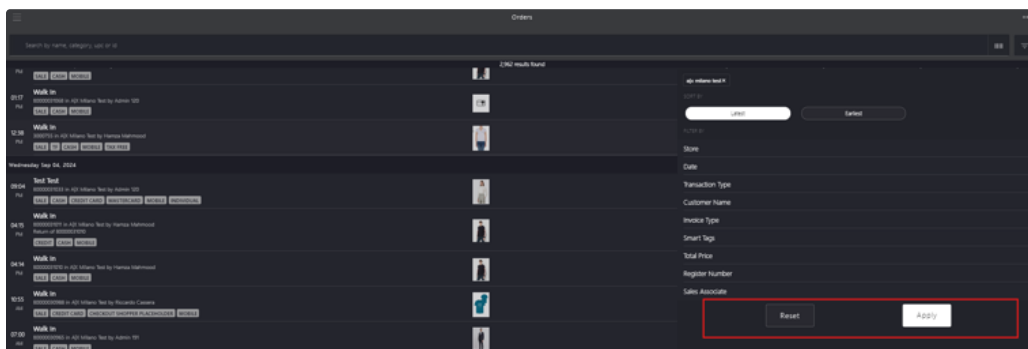


Filter Category	Description
<p style="text-align: center;">Store</p>	<p>Select the checkbox for the store where the orders were generated.</p>
<p style="text-align: center;">Date</p>	<p>Select Custom Range or Quick Link options to search for orders by the date they were generated.</p> <ol style="list-style-type: none"> 1. Custom Range: Select a date range when the order was generated. <ol style="list-style-type: none"> a. Start : Click start date field to select the date from the calendar. b. End: Click end date field to select the end date from the calendar. 2. Quick Links: Select from one of the following options when the order was generated: <ol style="list-style-type: none"> a. Today b. Yesterday c. Week to Date

	<p>d. Month to Date</p> <p>e. Year to Date</p>
Transaction Type	Search for the order by entering the transaction type in the Search by Transaction Type field or selecting the relevant transaction checkbox.
Customer Name	Search for the order by entering the customer's full name in the Enter Customer Last Name field who placed the order.
Invoice Type	Search for the order by entering the invoice type in the Search by Invoice Type field or selecting the relevant checkbox.
Smart Tags	Search for the order by entering the smart tags in the Search by Smart Tags field or selecting the relevant checkbox.
Total Price	Search for the order by selecting a price range that matches the order price.
Register Number	Search for the order by entering the register number in the Search by

	Register Number field.
Sales Associate	Search for the order by entering the sales associate's name in the Search by Sales Associate field.

Action Buttons



Action Buttons	Description
<p style="text-align: center;">Apply</p>	<p>Click the Apply button to apply filter criteria and display the requested order or orders list.</p>
<p style="text-align: center;">Reset</p>	<p>Click the Reset button to remove all the applied filters and return to default view.</p>

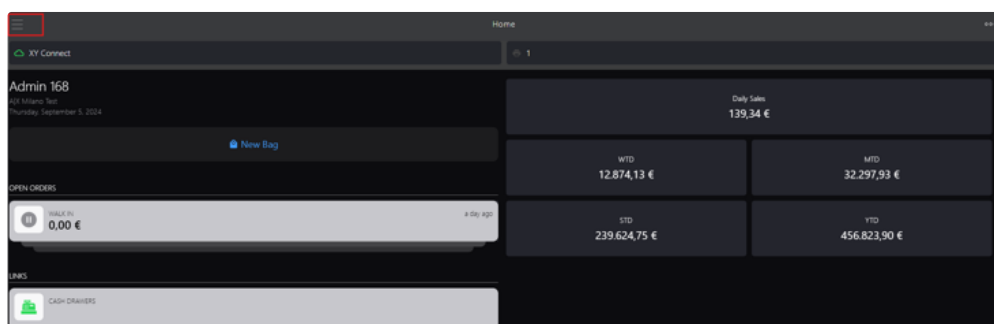
Returning an Item

Introduction

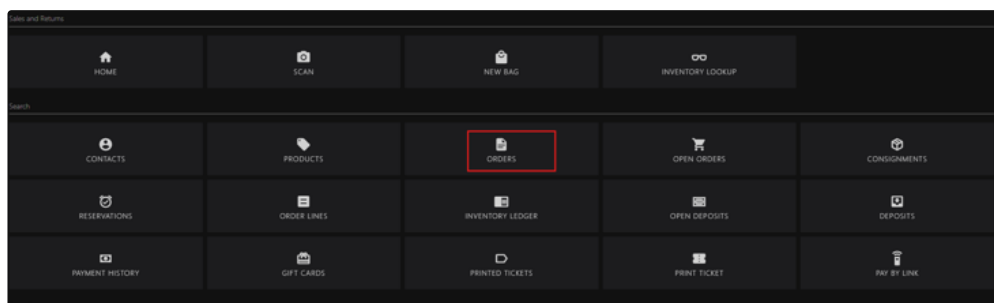
This topic explains the procedure for initiating a return process if a customer desires to return an item in the order.

Steps to Return an Order

1. Click the burger menu.

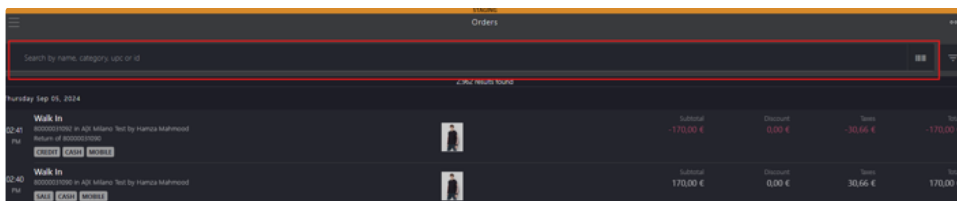


2. Click **ORDERS**.

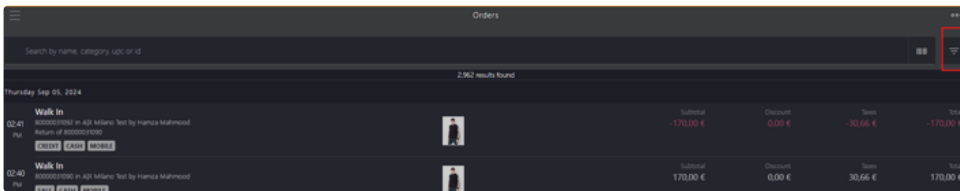


3. You can search the order id using following options:

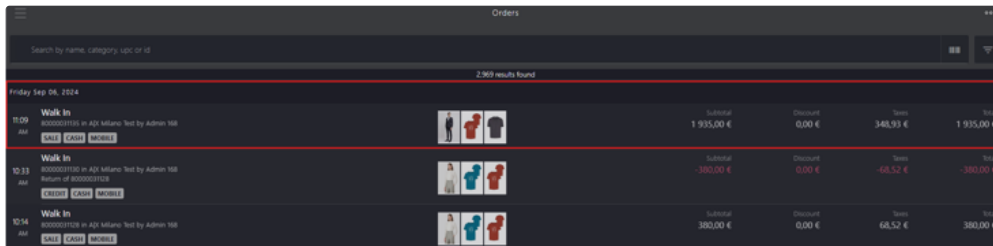
- a. For an order with reference, initiate a new search in the search box:



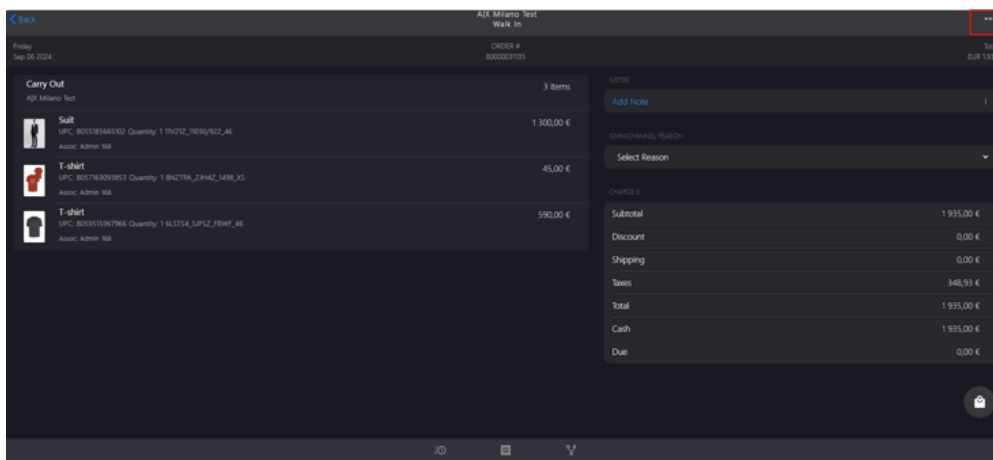
- i. Enter the following keywords:
 - name
 - category
 - upc
 - id
 - ii. Scan the order barcode.
- b. For an order without reference, use the built-in filters at upper right corner.



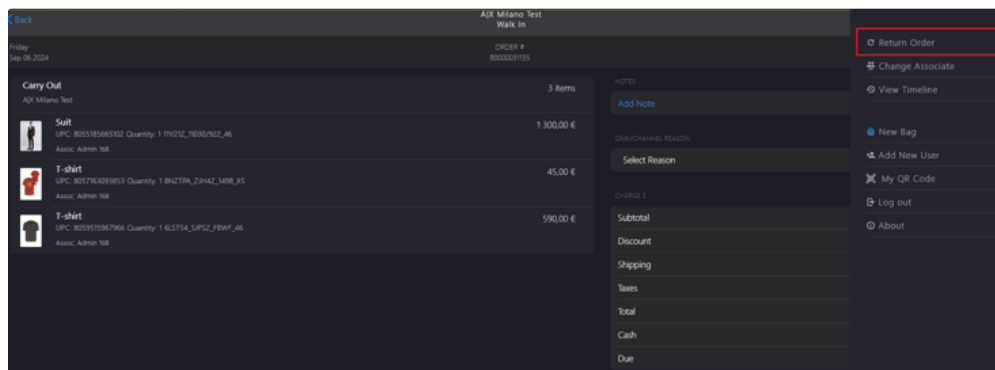
4. Click the order.



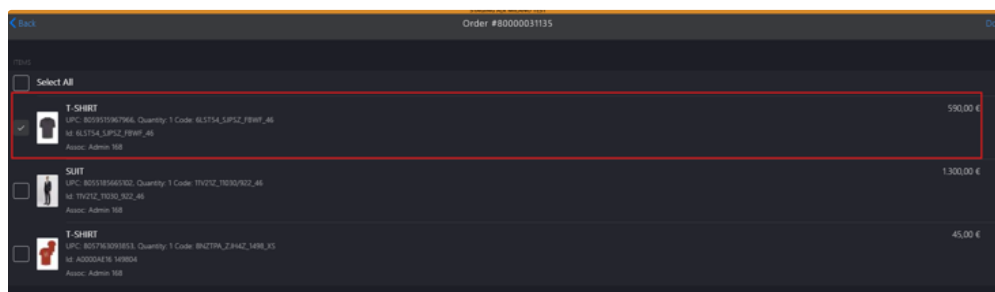
5. Click the meatballs menu.



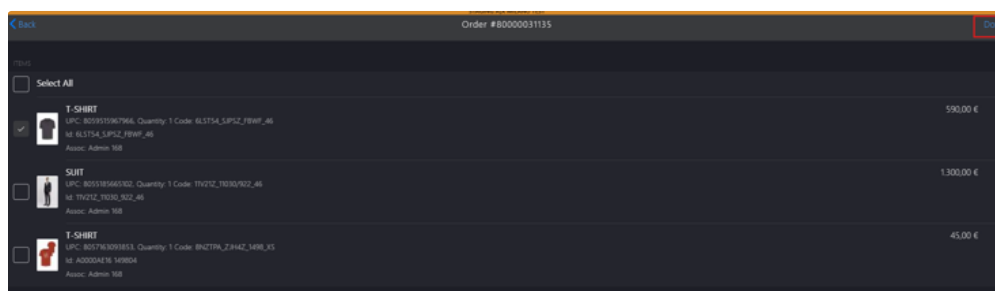
6. Click **Return Order**.



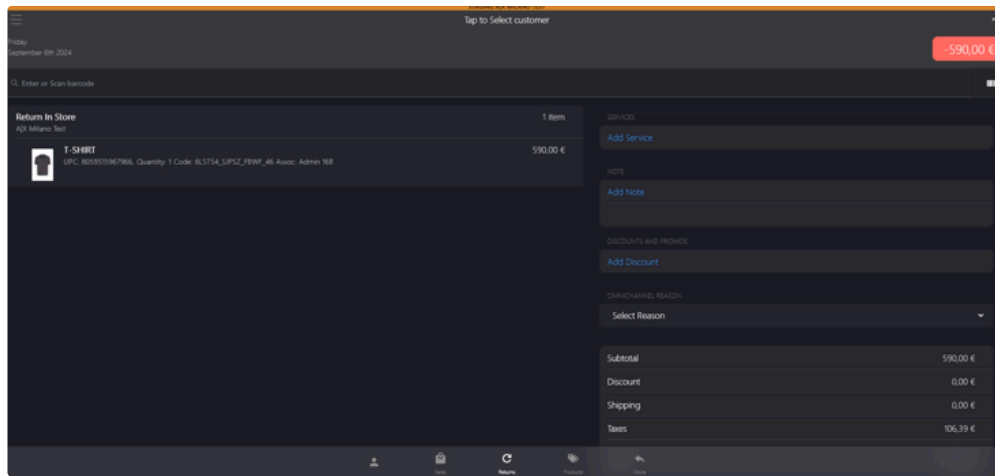
7. Select the item's checkbox you want to return.



8. Click **Done**.

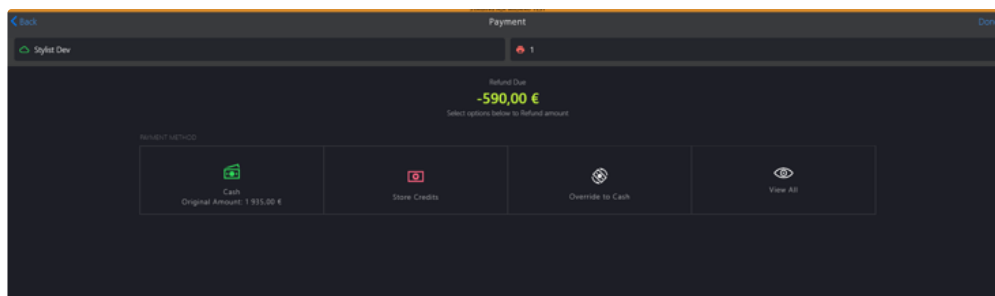


9. Click the red button in the upper right corner.

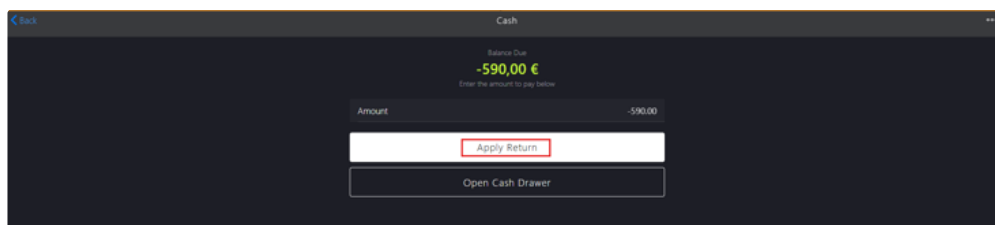


10. Click the preferred payment option.

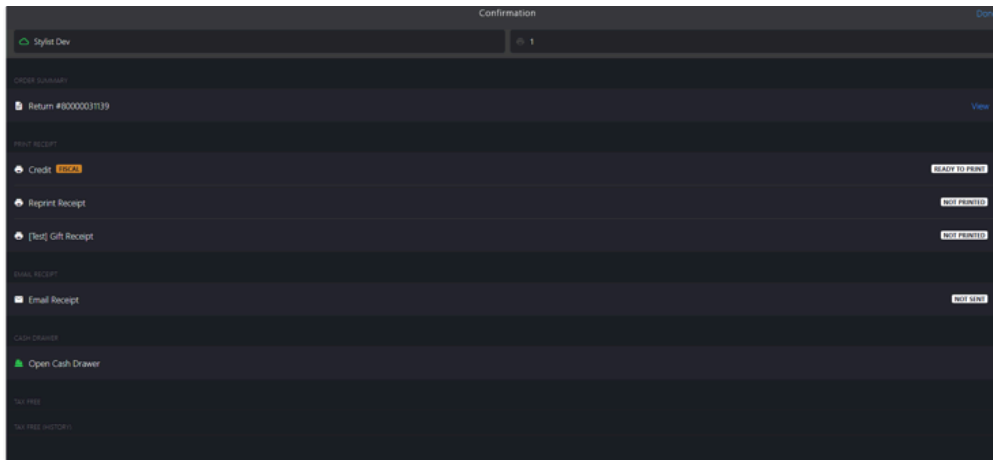
Note: CASH option has been selected in this scenario.



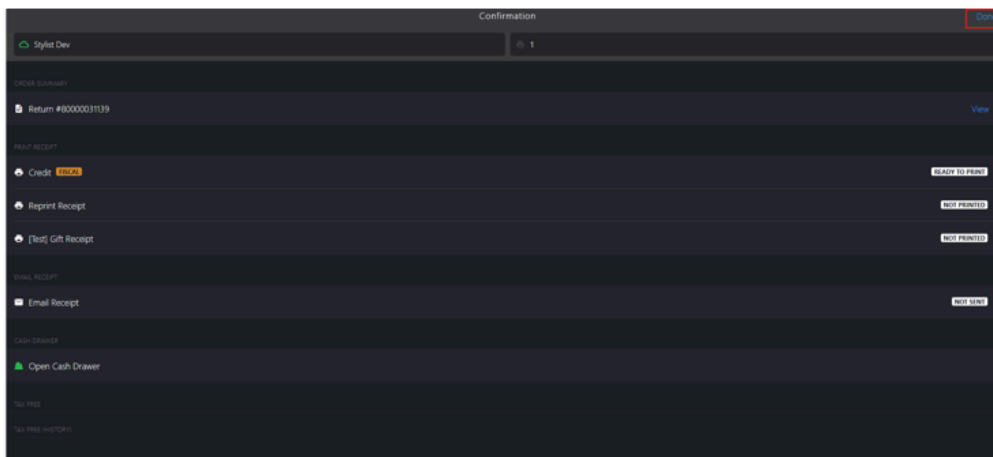
11. Click **Apply Return**.



12. You are directed to the confirmation page.



13. Click **Done** to complete the return of an item transaction.



Exchange Order

An exchange order is a type of transaction whereby the customer returns an item and the retailer facilitates an exchange of the customer's choice for a different item rather than issuing a refund.

Exchange Reason

1. **Size Issues:** The product is not expected fit, and the customer exchanges it for a different size.
2. **Color or Style Preference:** The customer prefers a different color, style, or model from what was originally purchased.
3. **Defective Product:** The original product is faulty and needs to be replaced.
4. **Received Wrong Item:** The customer received the wrong product and needs to exchange it with the correct item.
5. **Upgrade Compatibility:** The original product could not be utilized or meet the customer's needs, or the customer wants to upgrade to a different model with better features.

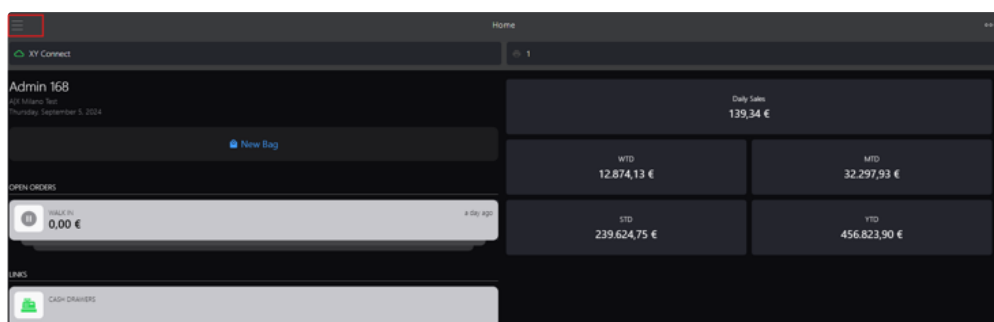
Exchanging an Order

Introduction

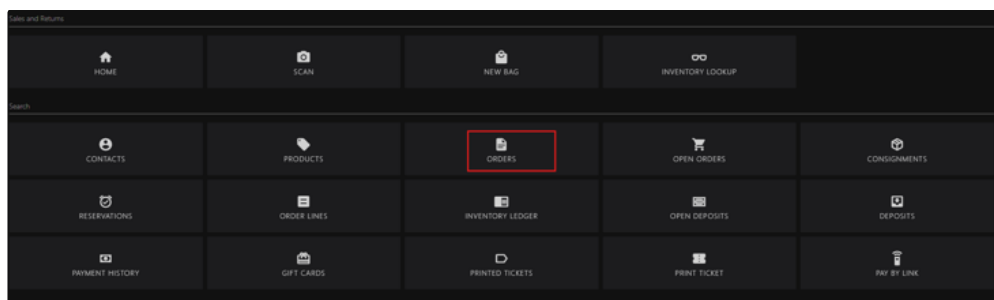
This topic explains the procedure for initiating an exchange process if a customer desires to exchange an order.

Steps to Exchange Order

1. Click the burger menu.

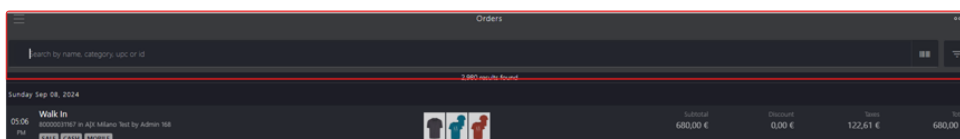


2. Click **ORDERS**.



3. You can search the order id using following options:

- a. For an order with reference, initiate new search in the search box:

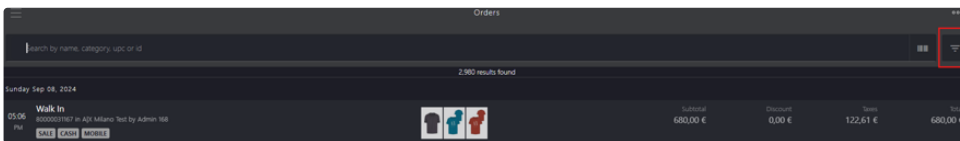


i. Enter the following keywords:

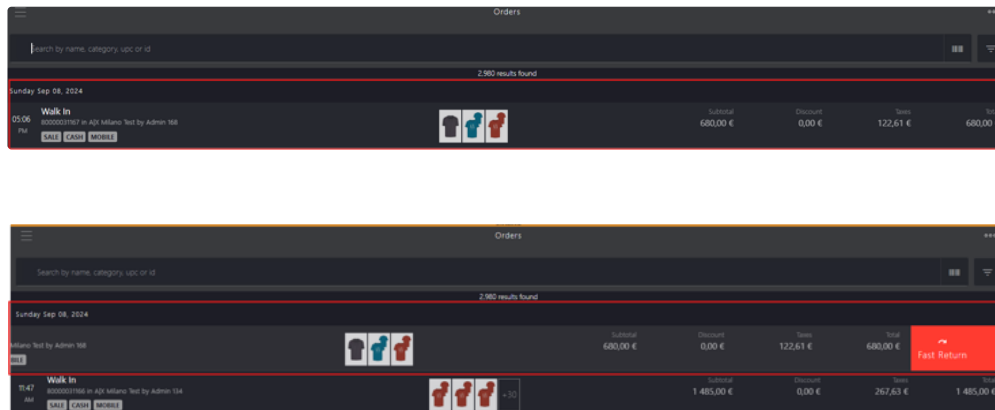
- name
- category
- upc
- id

ii. Scan the order barcode

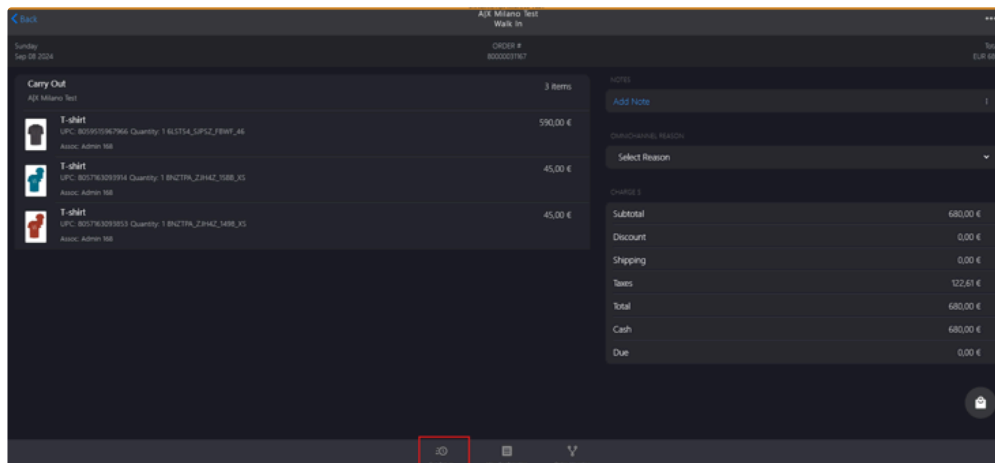
b. For an order without reference, use the integrated filters at the upper right corner.



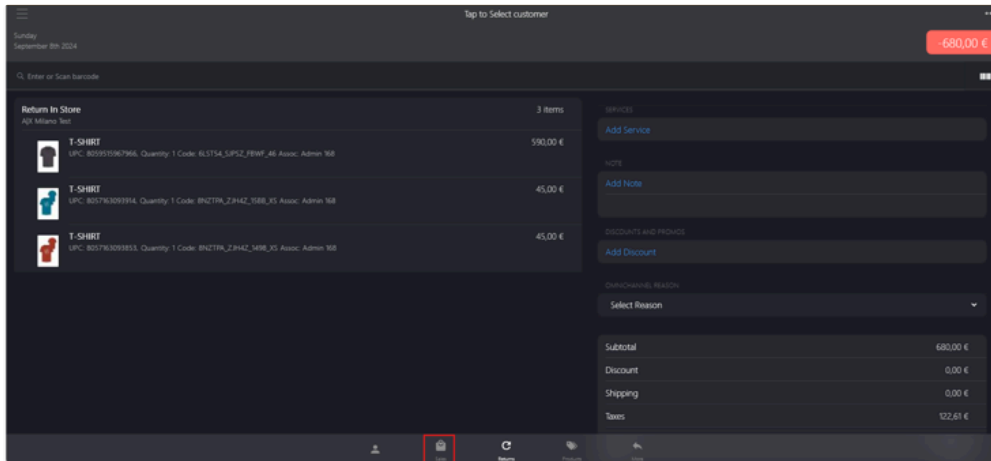
4. Click the order, or alternatively, swipe the order to the left to access **Fast Returns**.



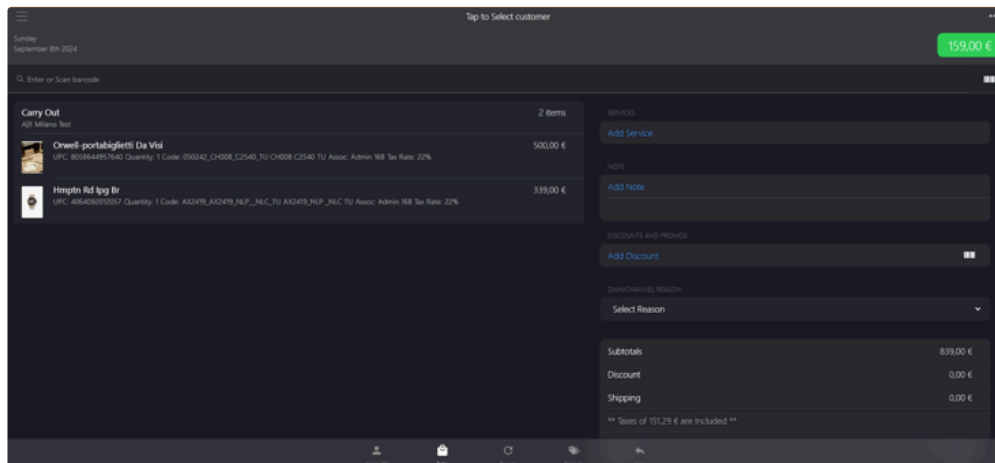
5. Click **Fast Return** on the bottom bar.



6. Click **Sales** on the bottom bar of the return cart page.

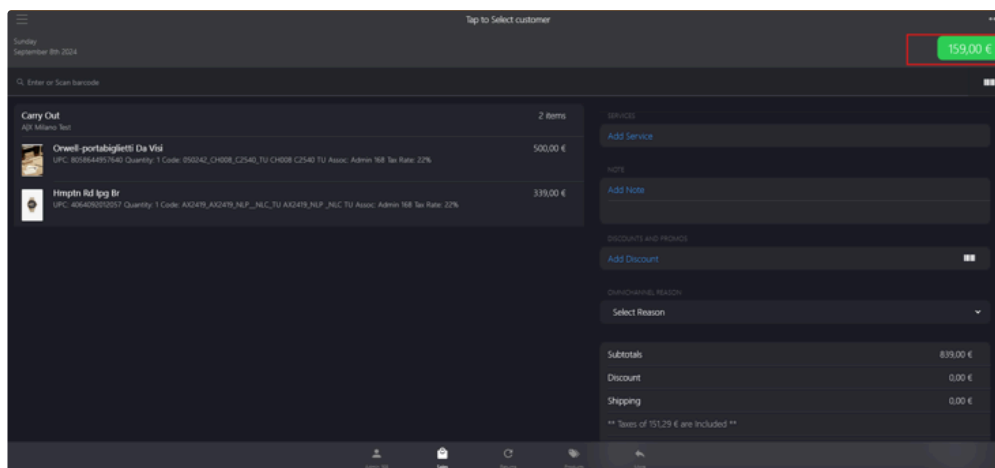


7. Go to **Enter or Scan barcode** box to add the products.



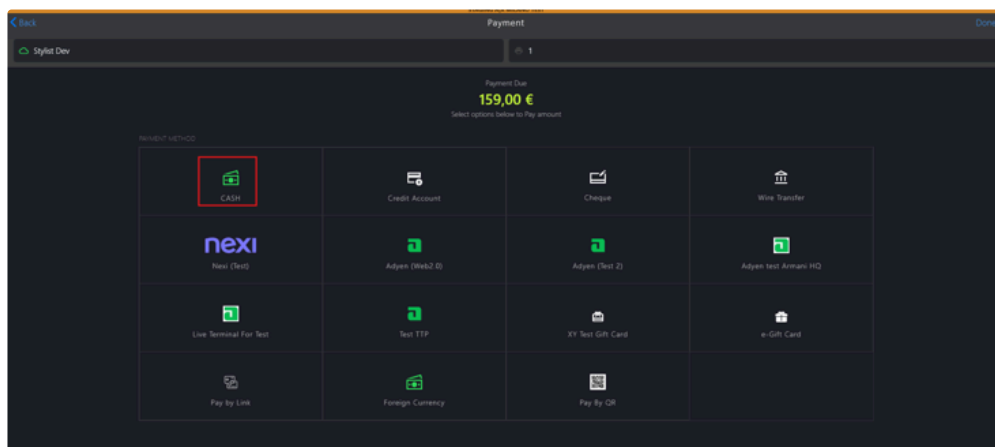
- If you have a barcode scanner, scan the product's barcode. The code will automatically appear in the box.
- If a scanner is unavailable, manually enter the product barcode number into the box.
- If you cannot find the item, go to the meatballs menu and select [+ Add Missing Item](#) to save the item to **Products**.

8. Click the green button in the upper right corner.

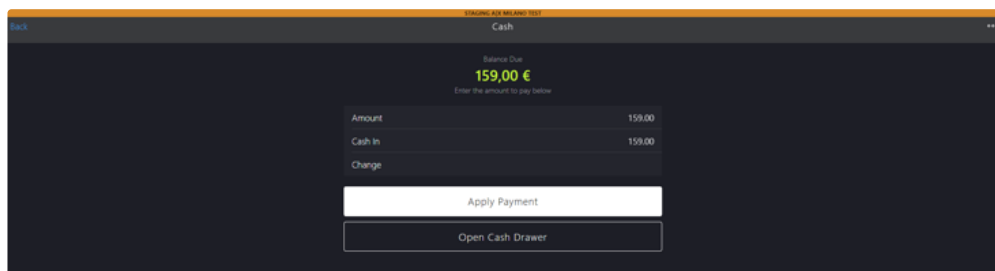


9. Select the preferred payment options.

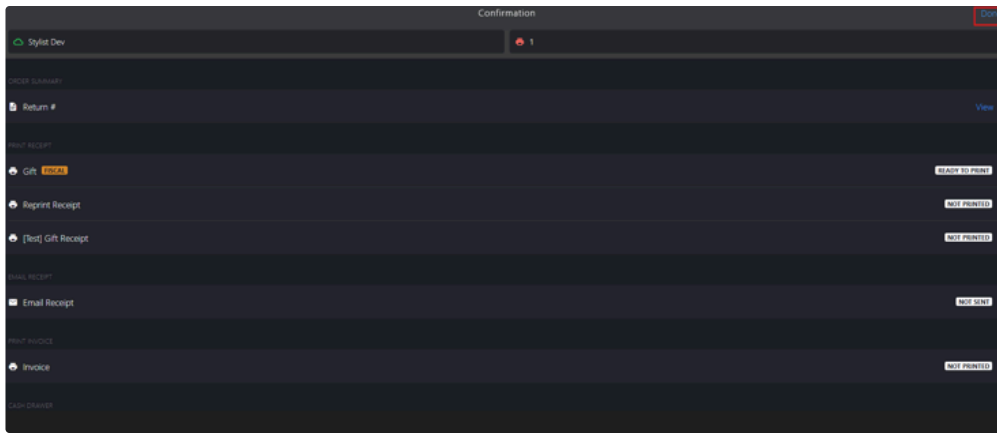
Note: CASH option has been selected in this scenario.



10. Click **Apply Payment**.



11. Click **Done** to complete the sale.



Reservation

A reservation in retail store management is the process where the client expresses interest in buying an item, which effectively removes the same from the available inventory. Reservations are convertible to orders although at times they can be canceled if necessary.

Types of Reservations:

1. **In-Store Reservations:** Customers can place an order at the store with a deposit or underpayment terms to ensure a hold of the product.
2. **Online Reservations:** Customers can reserve items through a retailer's website or application, and sometimes they can pick them up in-store or arrange for delivery.
3. **Special Orders:** Special orders are maintained when the items ordered are not available in stock; this order is issued after proper processing and confirmation.

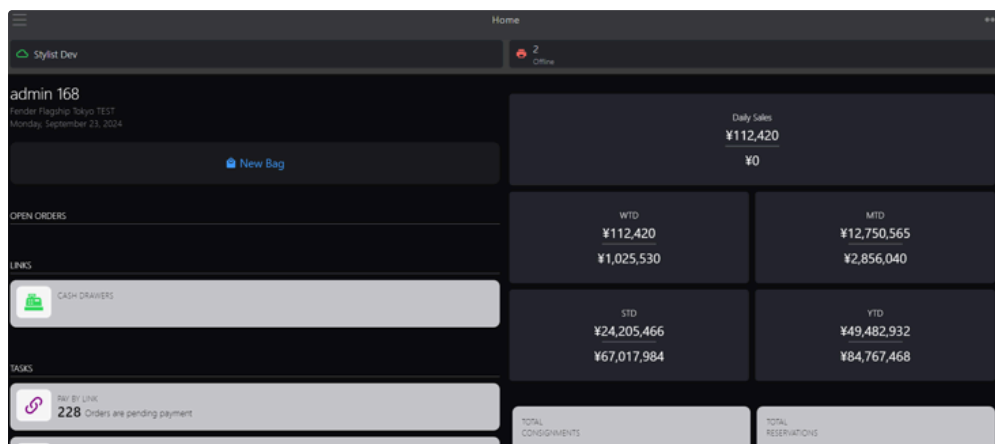
Creating a Reservation

Introduction

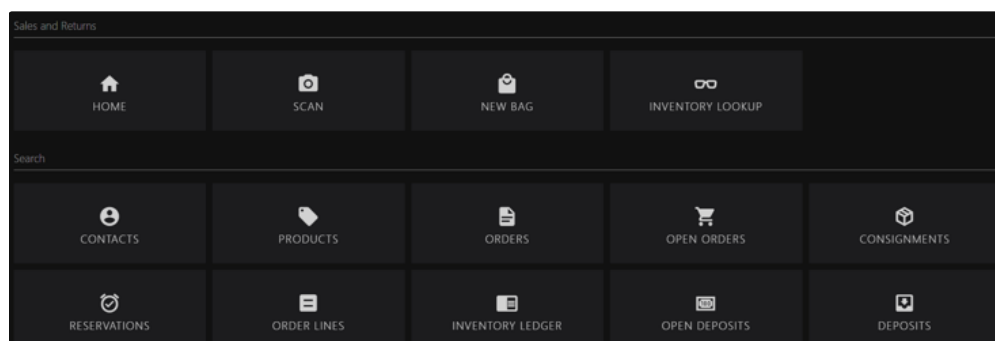
This topic explains the procedure for creating a reservation when a customer requests a sales associate to reserve the selected items.

Steps to Create a Reservation

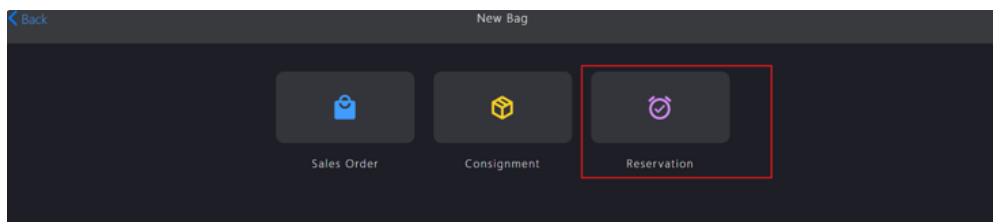
1. Click the burger menu.



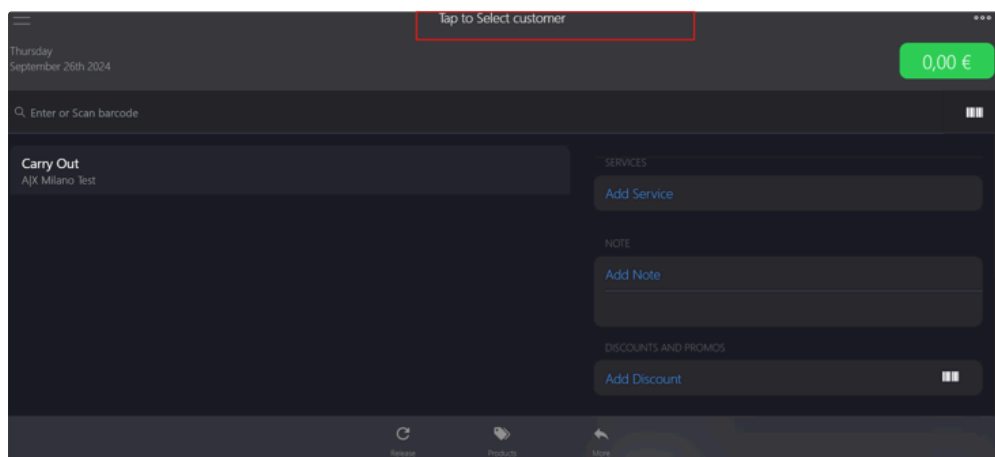
2. Click **New Bag**.



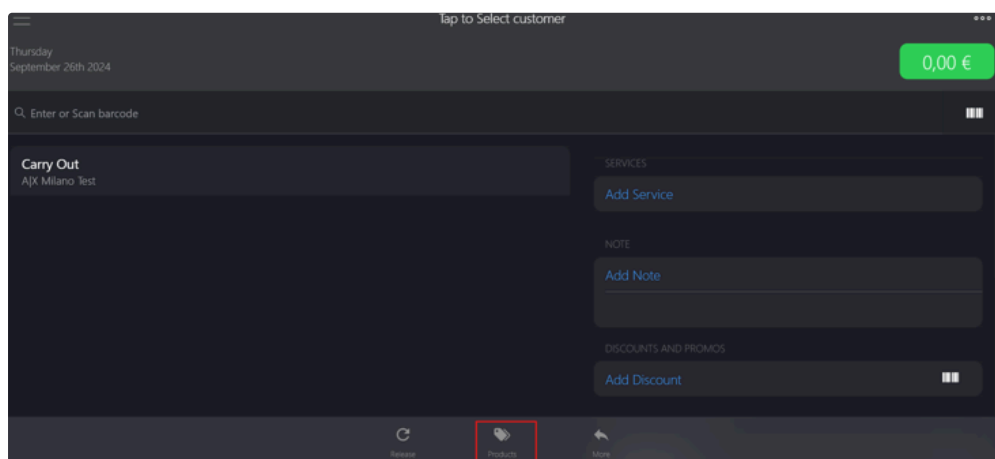
3. Click **Reservation**.



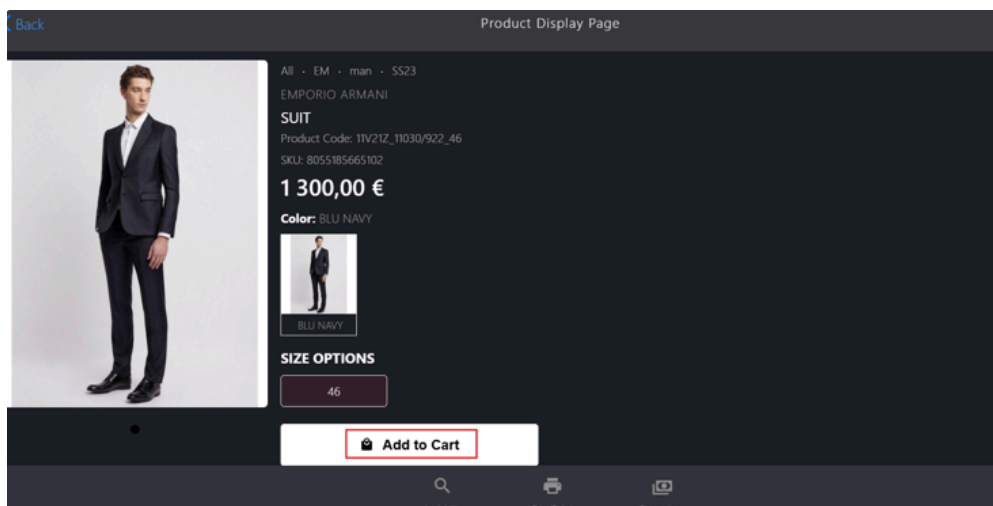
4. Click **Tap to Select customer** to add the customer.



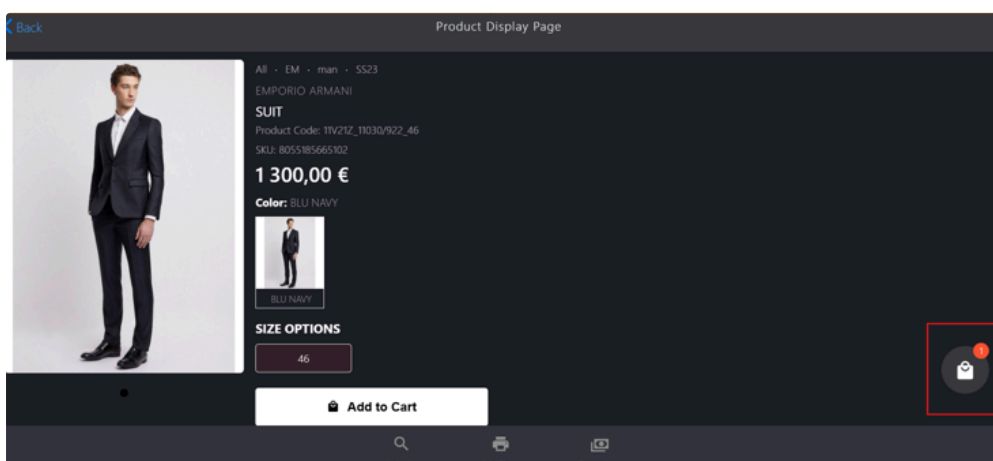
5. Click **Products** on the bottom bar to select the item.



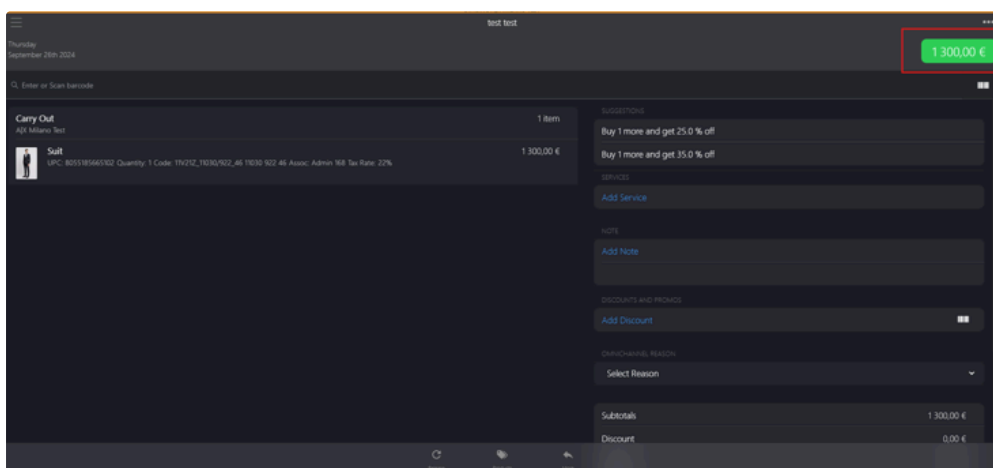
6. Click **Add to Cart** to reserve the item.



7. Click the bag icon to navigate back to the reservation page.



8. Click the green button in the upper-right corner.



9. Click **Done** to complete the reservation.



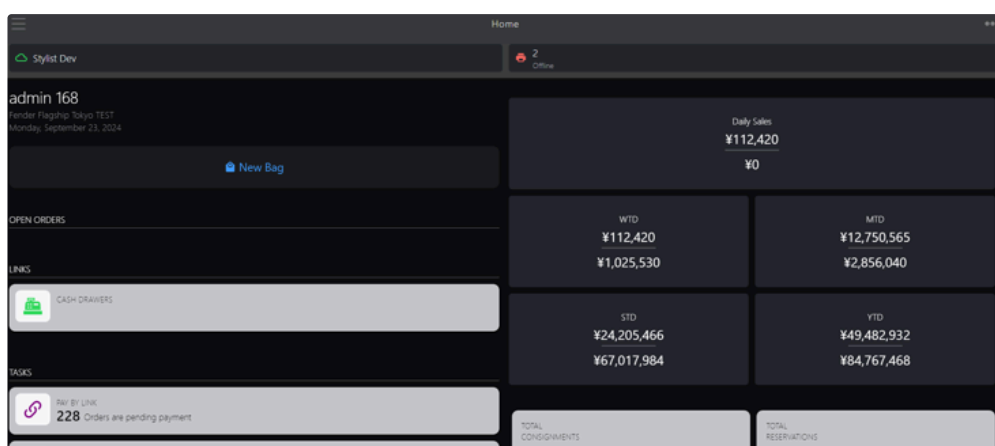
Creating Sale from a Reservation

Introduction

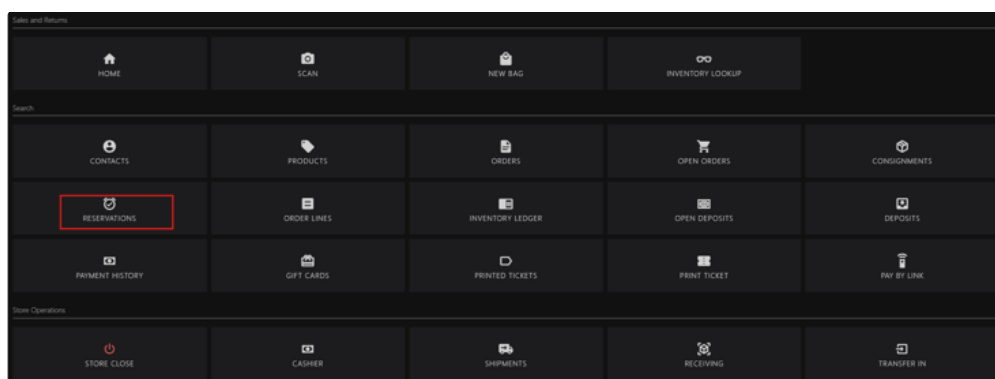
This topic explains the procedure when a customer proceeds with a purchase from a reservation.

Steps to Create a Sale from a Reservation

1. Click the burger menu.

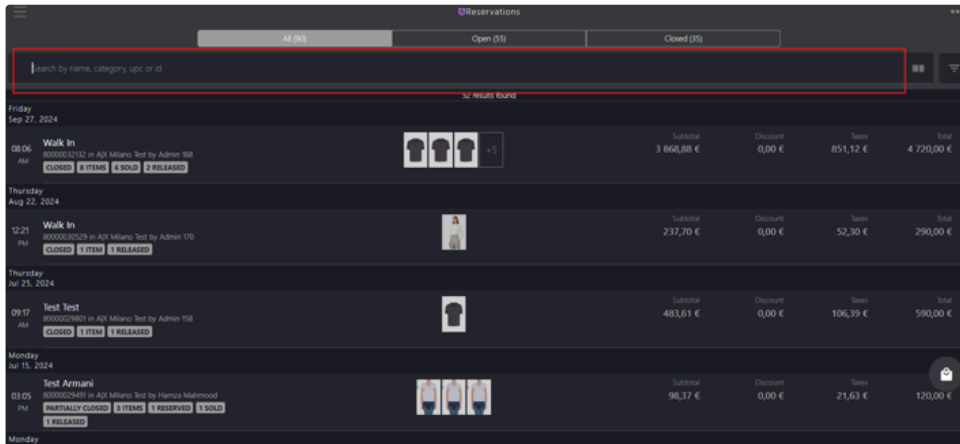


2. Click **RESERVATIONS**.



3. Search for the reserved orders using any of the following methods:

a. Enter any of the following criteria in the search box:



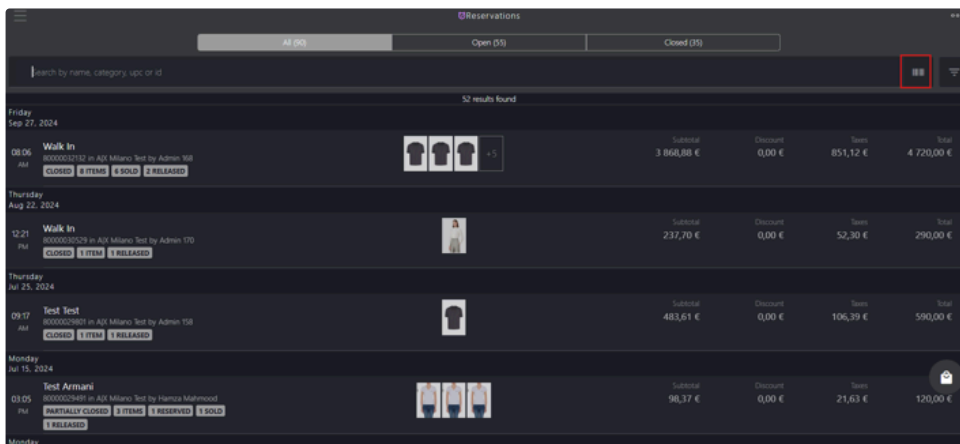
i. **name:** Enter the customer's name.

ii. **category:** Enter the reservation cart status (**Open, Closed, or Partially Closed**).

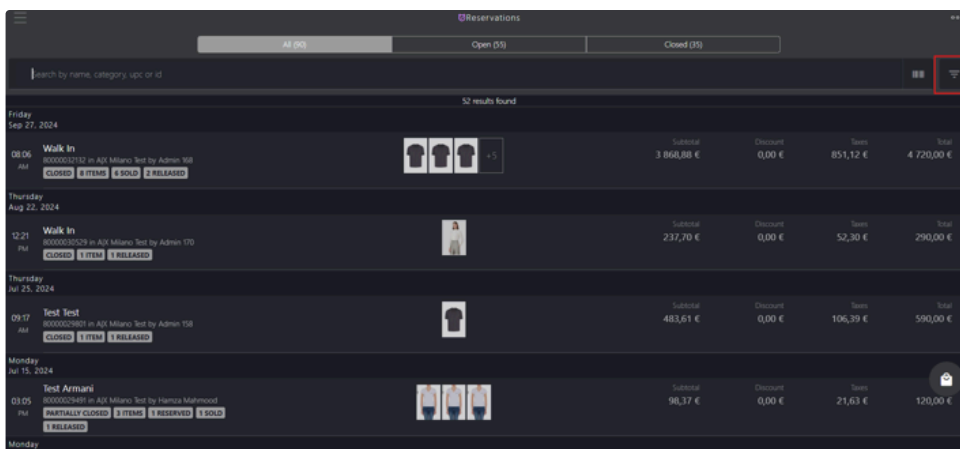
iii. **upc:** Enter the item's UPC.

iv. **id:** Enter the order id.

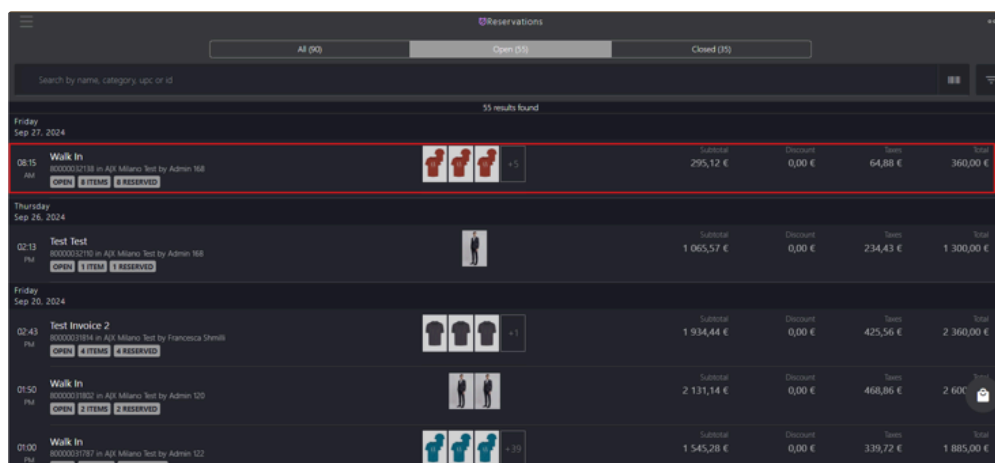
b. Scan the item barcode.



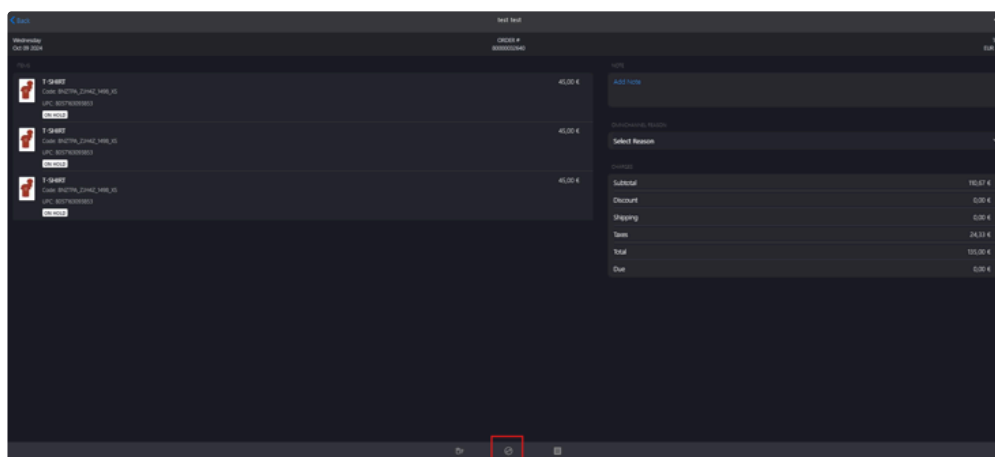
c. Apply the [filters](#) based on the category.



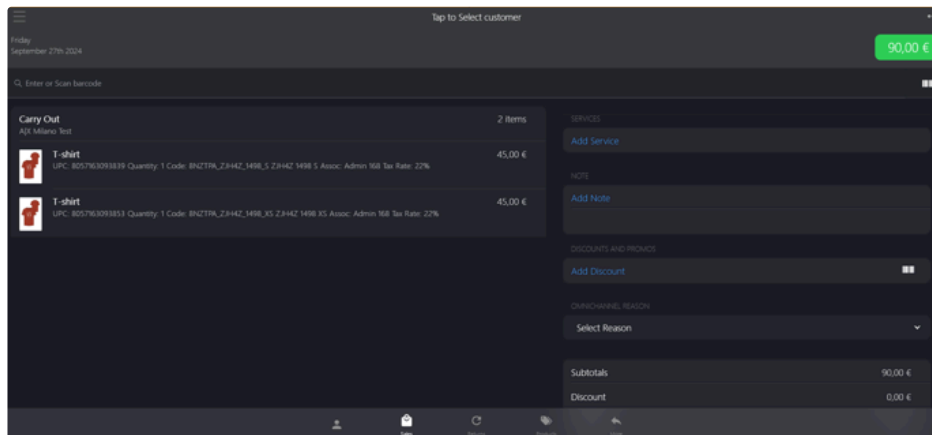
4. Select the order number from the list.



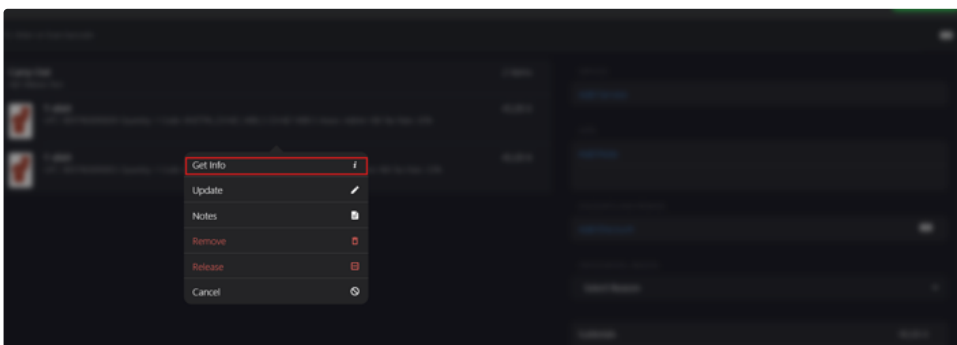
5. Click **Sale** on the bottom bar.



6. Click the item to perform the following item level change:



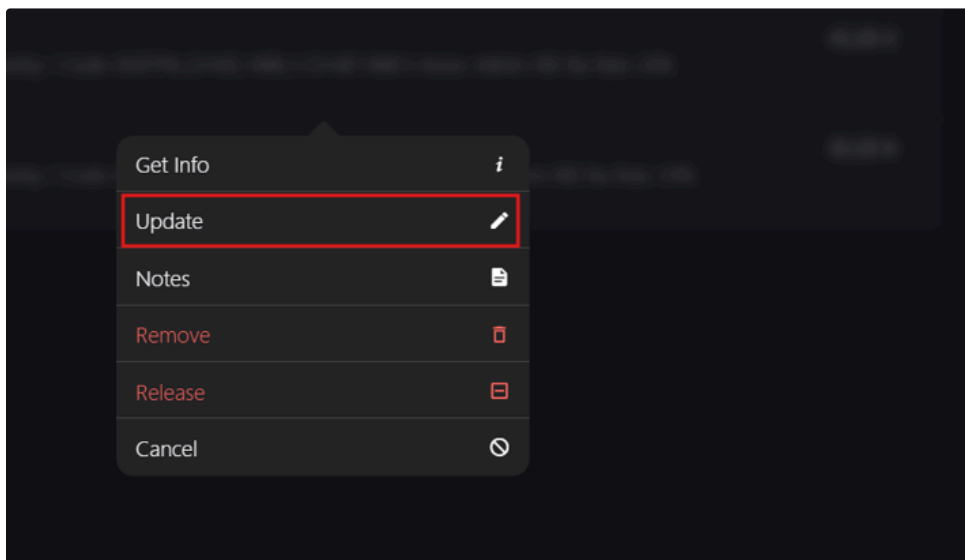
a. Select **Get Info** from the pop-up menu to view item details:



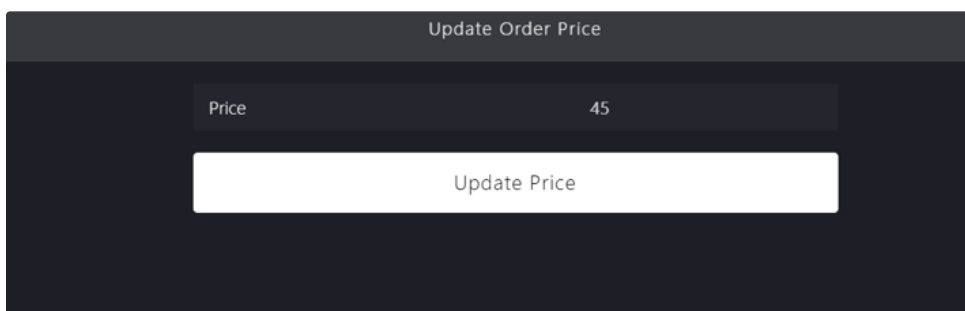
- i. **View Product:** Displays the item information.
- ii. **Action:** Displays purchase status, for example, Buy.
- iii. **Delivery:** Displays the current delivery stage of the item.
- iv. **Sales Associate:** Displays the associate's name handling the sale.
- v. **Unit Price:** Displays the item's price.
- vi. **Quantity:** Displays the number of items ordered.
- vii. **Inventory Location:** Displays the store location of the item.
- viii. **Charges:** Displays the item and shipping charges.
- ix. **Taxes:** Displays tax price.
- x. **Total:** Displays total charges, including taxes.
- xi. **Due:** Displays the amount due to the retailer.

b. Update item price

- i. Select **Update** from the pop-up menu to change the item price.

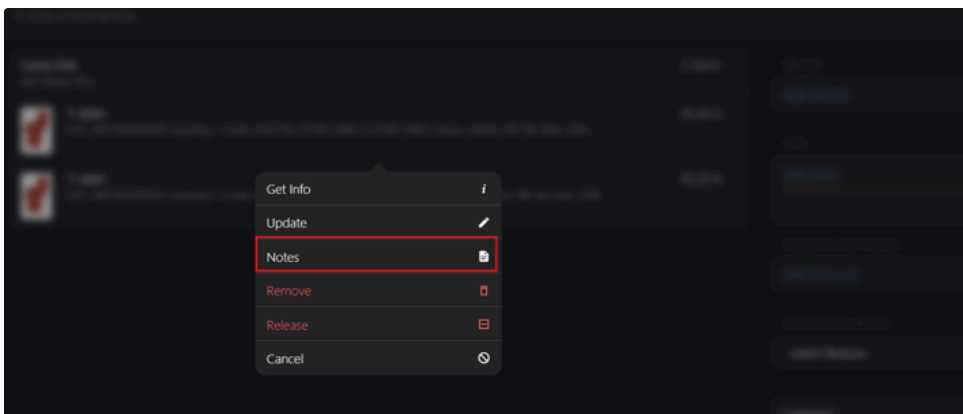


- ii. Click **Update Price** to change the item price.

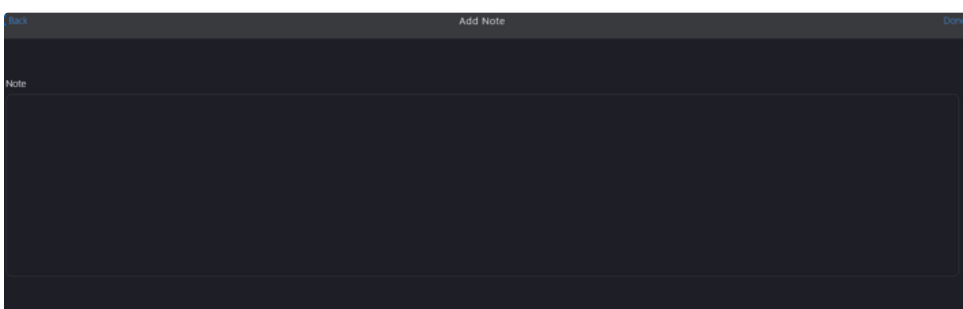


c. Add notes

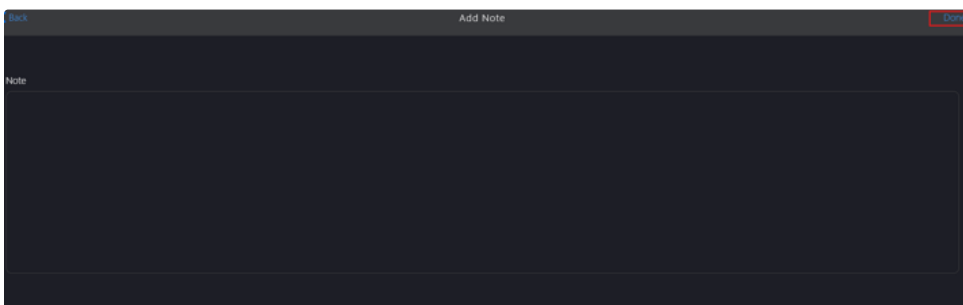
- i. Select **Notes** from the pop-up menu to add specific customer requests or unique notes related to item delivery.



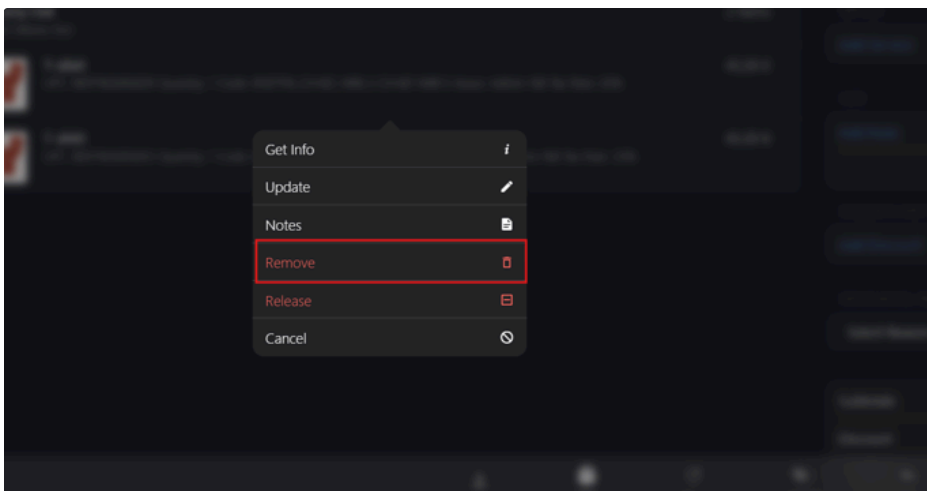
ii. Enter the note in the note field.



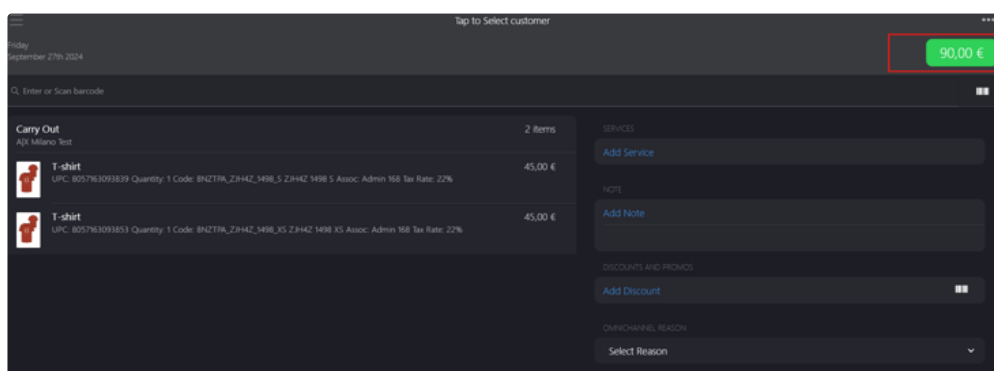
iii. Click **Done** to add the note.



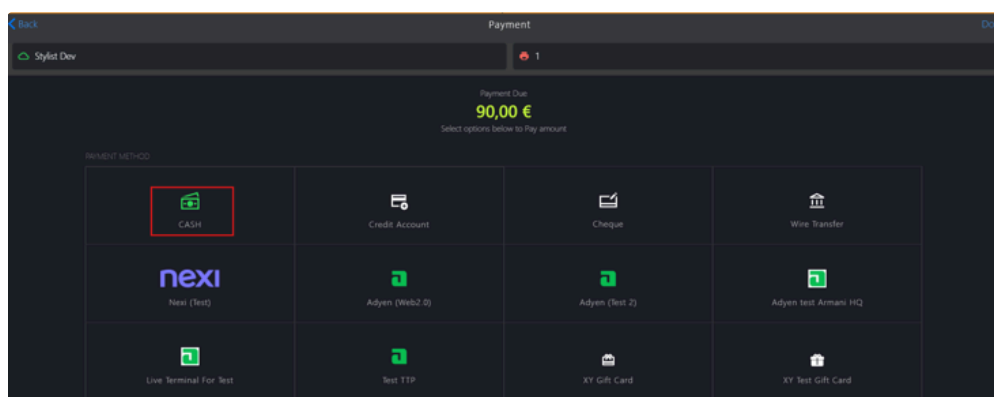
d. Select **Remove** from the pop-up menu to remove the item from the sales cart.



7. Click the green button on the upper right corner.



8. Select the appropriate payment method.

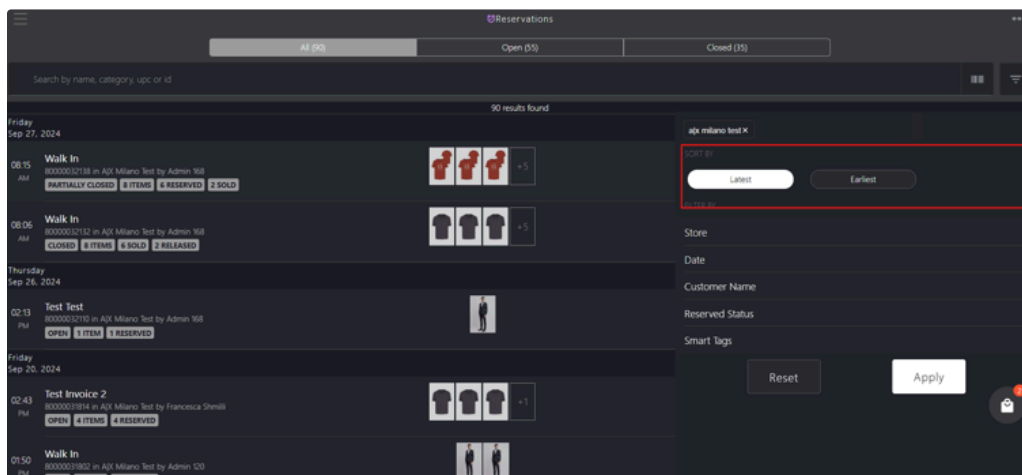


9. Click **Apply Payment** to complete the transaction.

Built-in Reservation Filter

Built-in reservation filter enhance the search experience with the drop-down menu filter category. You can tailor and sort the results to meet your precise requirements by selecting and applying specific criteria.

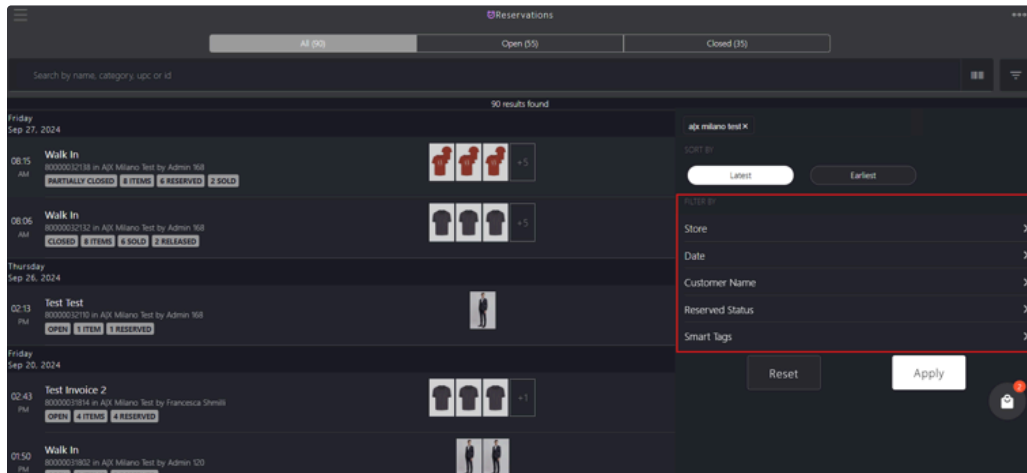
Filter Features



Sorting

Sorting Criteria	Description
Latest	Select the Latest option to view orders from the most recent date to the oldest.
Earliest	Select the Earliest option to view orders from the oldest date to the most recent.

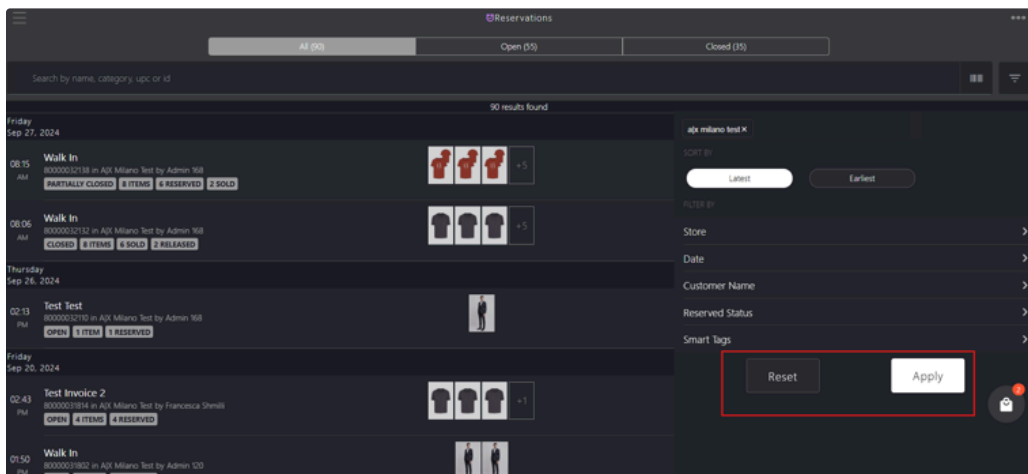
Filter



Filter Category	Description
Store	Select the checkbox for the store where the item reservation was done.
Date	<p>Select Custom Range or Quick Link options to search for orders by the date they were generated.</p> <ol style="list-style-type: none"> Custom Range: Select a date range when the order was generated. <ol style="list-style-type: none"> Start: Click the start date field to select the date from the calendar. End: Click the end date field to select the end date from the calendar. Quick Links: Select from one of the following options when the order was generated: <ol style="list-style-type: none"> Today

	<ul style="list-style-type: none"> b. Yesterday c. Week to Date d. Month to Date e. Year to Date
Customer Name	Search for the reservation by entering the customer's full name in the Enter Customer Last Name field, or select the customer from the list using the checkbox.
Reserved Status	Search for the reservation by entering the reservation status in the Search by Reserved Status field or selecting the appropriate status checkbox.
Smart Tags	Search for the tags by entering the smart tags in Search by Smart Tags field or selecting the appropriate checkbox.

Action Buttons



Action Buttons	Description

Apply	Click the Apply button to apply filter criteria and display the requested order or orders list.
Reset	Click the Reset button to remove all the applied filters and return to the default view.

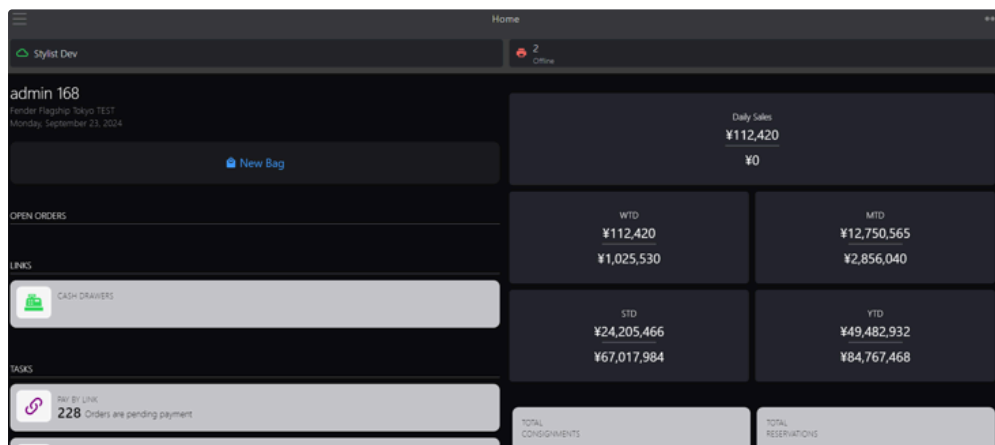
Releasing Items from Reservation

Introduction

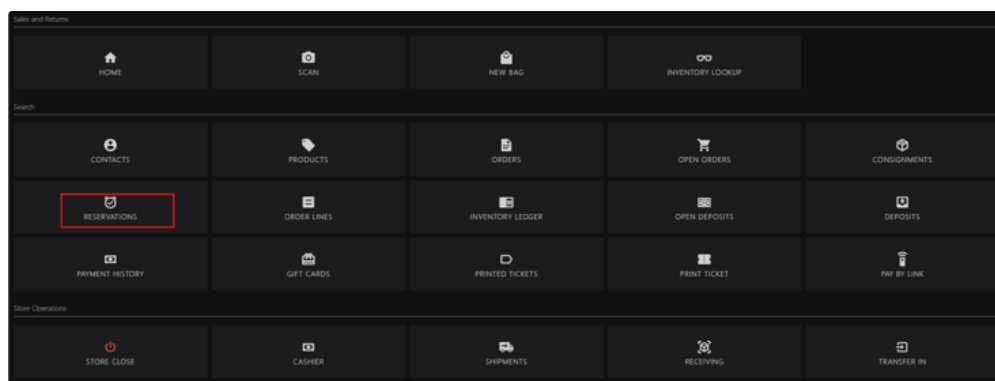
This topic explains the procedure of releasing items from a reservation.

Steps to Release an Item from a Reservation

1. Click the burger menu.

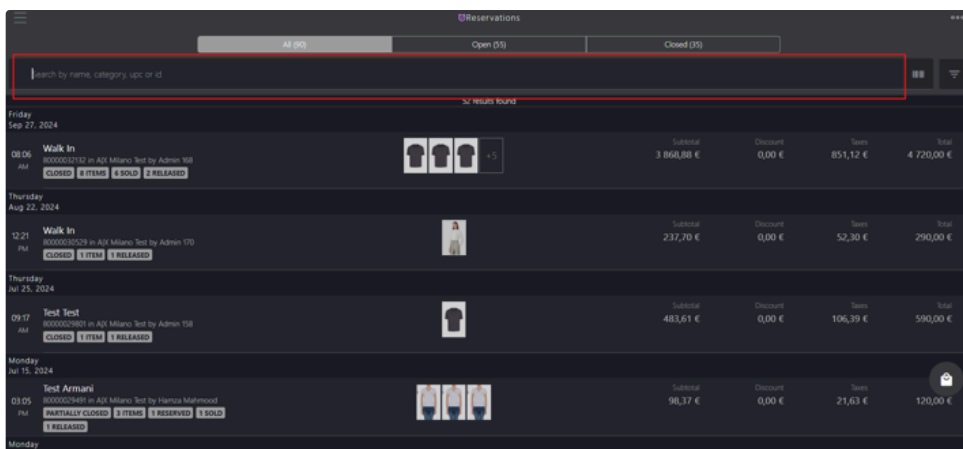


2. Click **RESERVATIONS**.

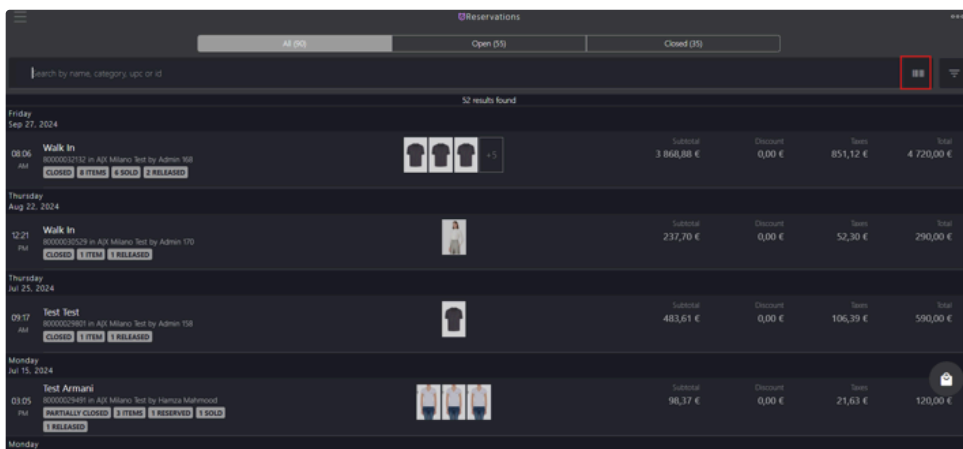


3. Search for the order using any of the following methods:

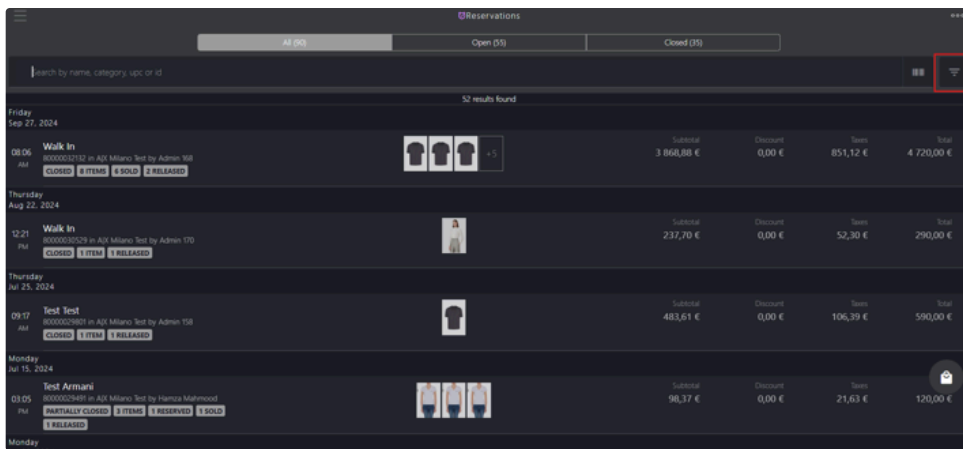
- a. Enter any of the following criteria in the search box:



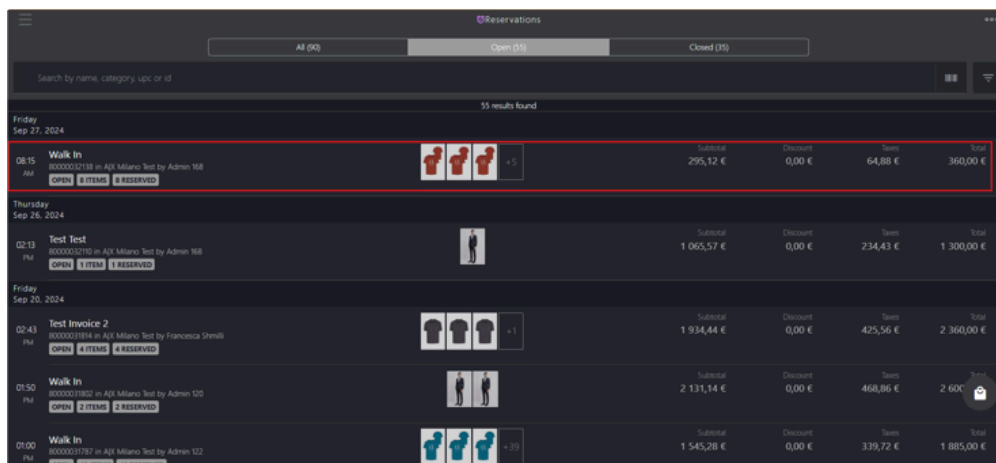
- i. **name:** Enter the customer's name.
 - ii. **category:** Enter the reservation cart status (**Open, Closed, or Partially Closed**).
 - iii. **upc:** Enter the item's UPC.
 - iv. **id:** Enter the order id.
- b. Scan the item barcode.



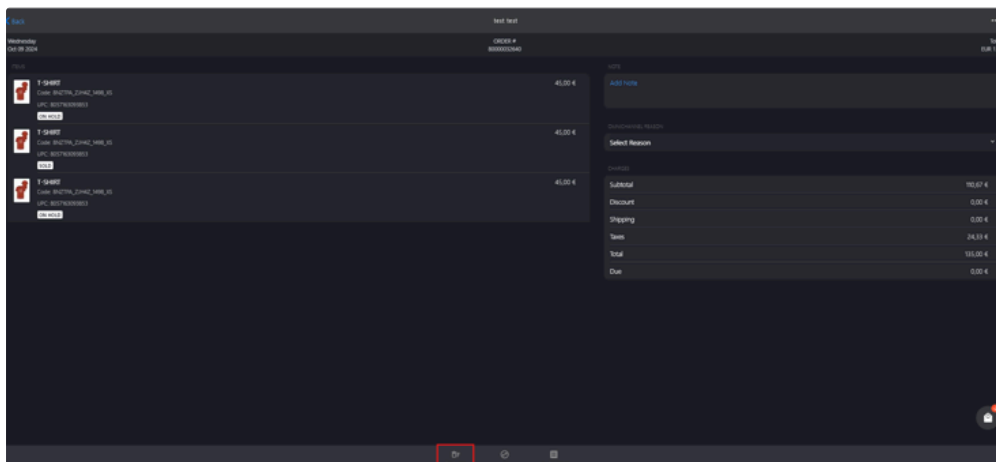
- c. Apply the [filters](#) based on the category.



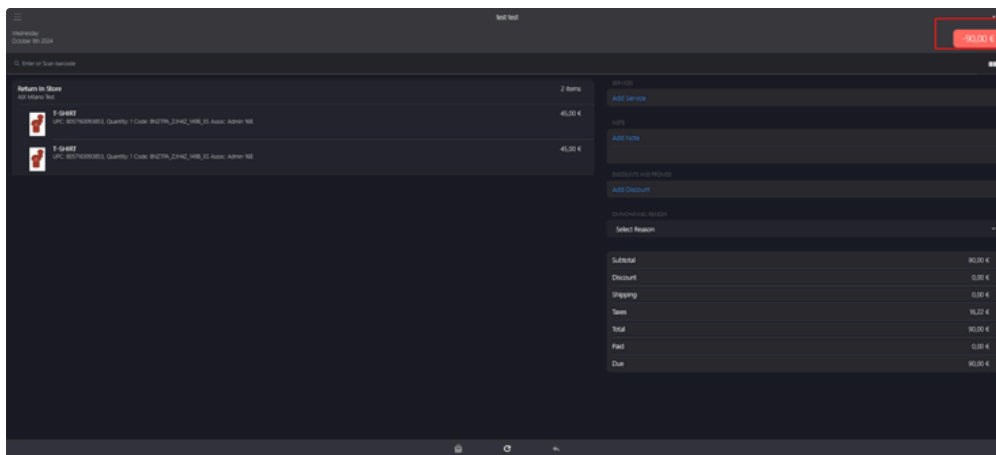
4. Select the order number from the list.



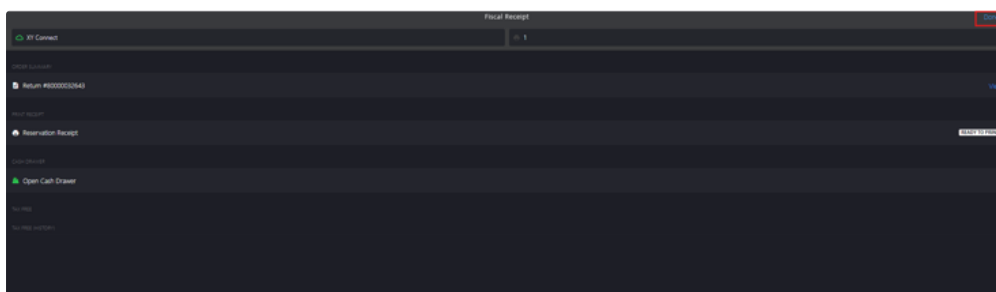
5. Click **Fast Release** on the bottom bar.



6. Click the red button on the upper-right corner.



7. Click **Done** to complete the item release.



Deposit Linked Reservation

Deposit Linked Reservation is a useful POS feature that benefits both retailers and customers, ensuring a seamless business and improving the shopping experience.

For the retailer, this feature improves inventory management and financial assurance.

For the customer, this feature provides the opportunity to pre-order high-demand or future-release items with just partial payment as a deposit, as required by the retailer.

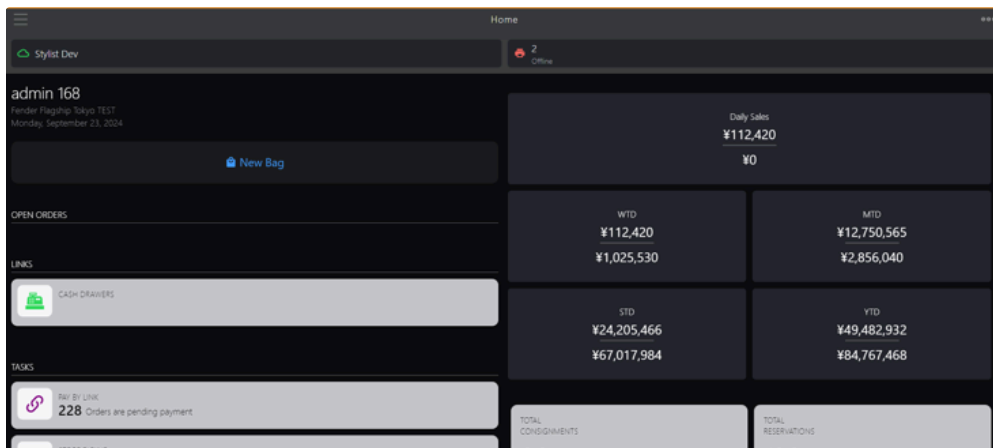
Creating a Reservation and Collecting a Deposit

Introduction

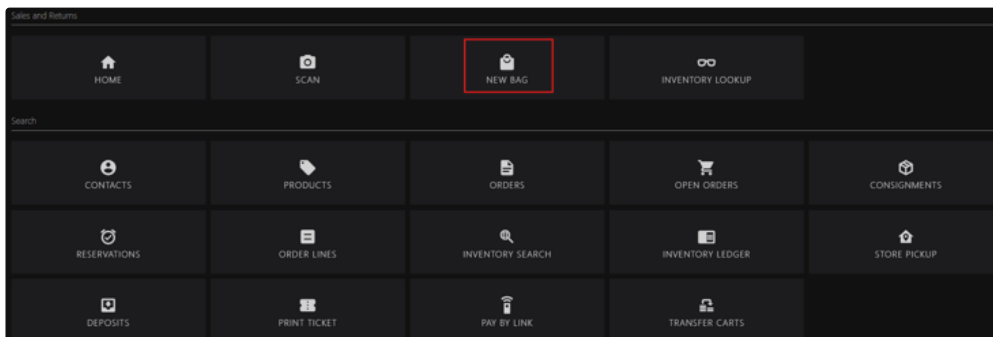
This topic explains the procedure for creating a reservation for an item and adding a deposit as requested by the retailer when a customer desires to preorder an item from the store.

Steps to Create a Reservation Deposit

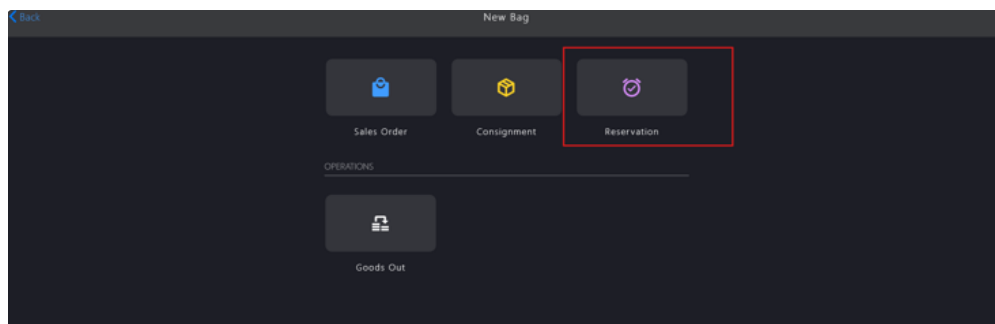
1. Click the burger menu.



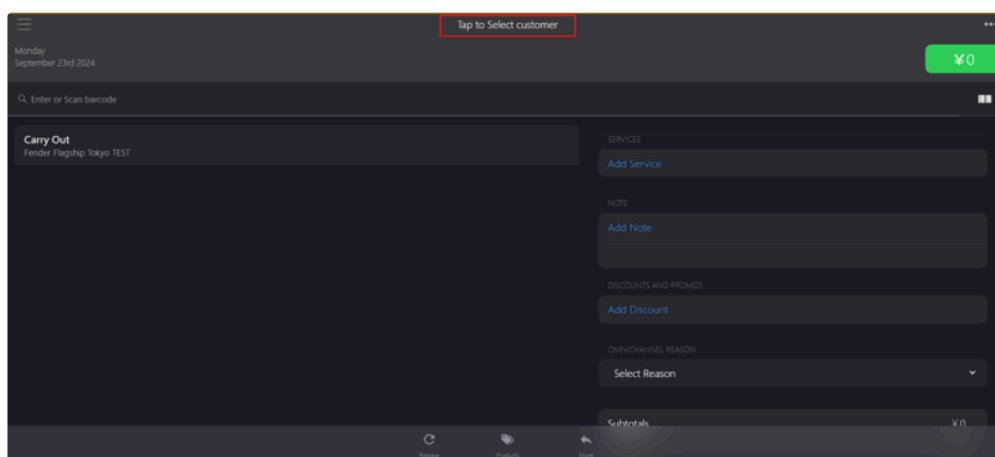
2. Click **New Bag**.



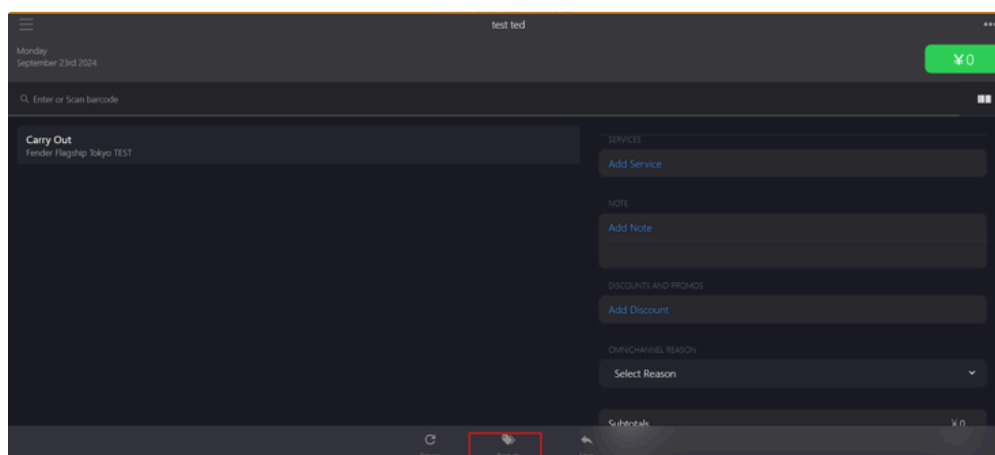
3. Click **Reservation**.



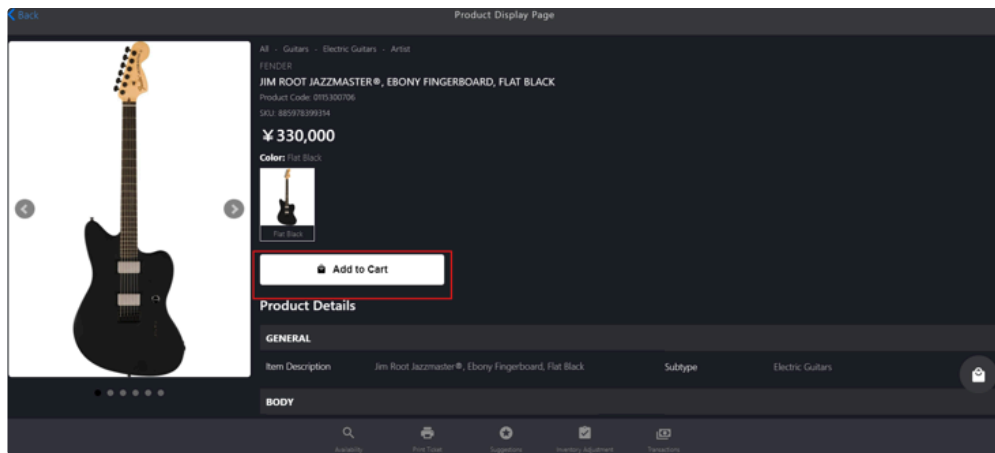
4. Click **Tap to Select customer** to add the customer.



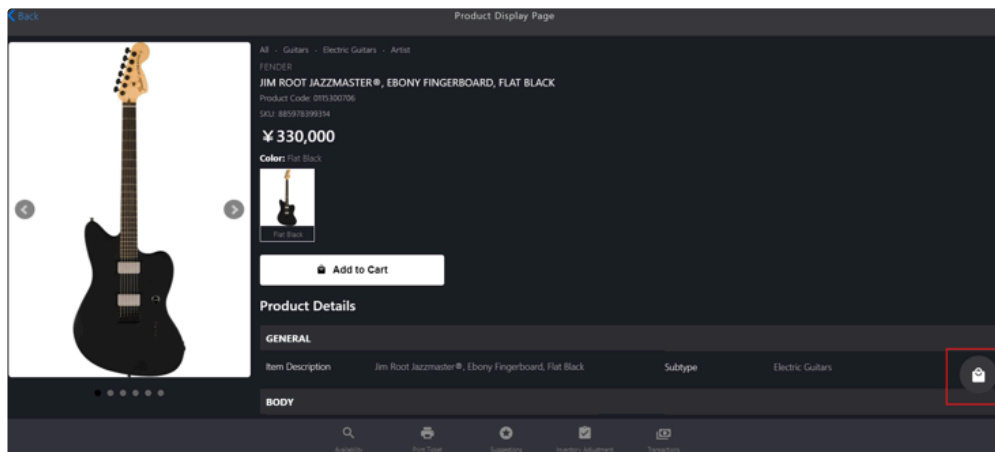
5. Click **Products** to select the item.



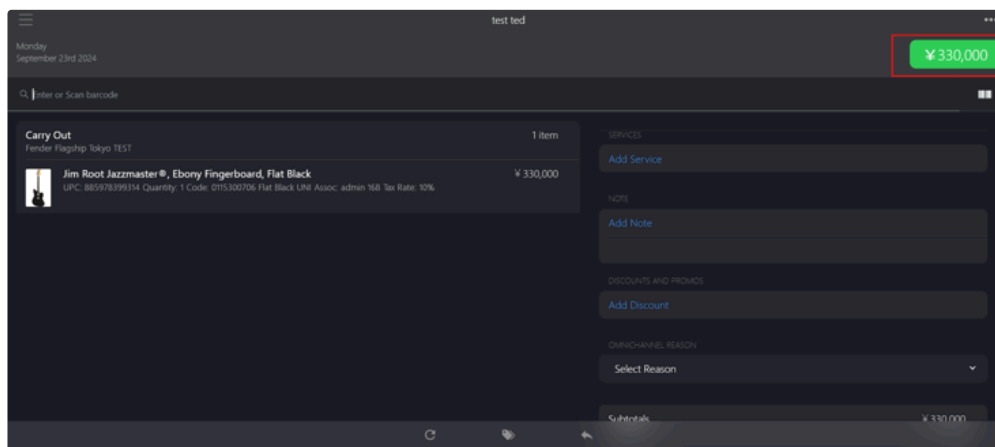
6. Click **Add to Cart** to reserve the item.



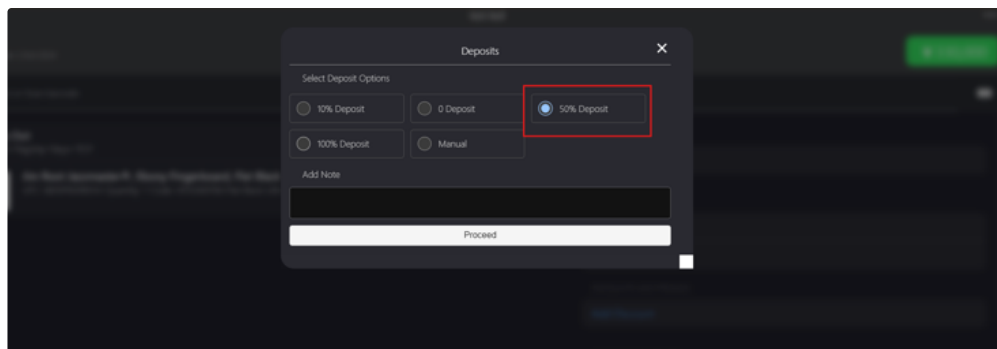
7. Click the bag icon to navigate back to the reservation page.



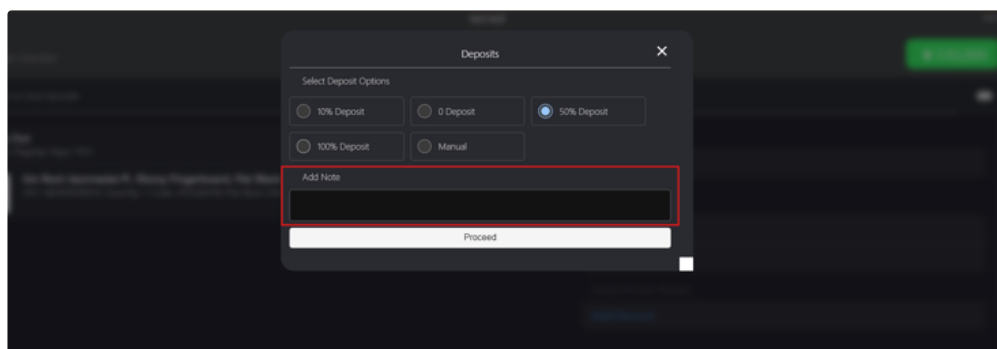
8. Click the green button in the upper-right corner to add the deposit percentage.



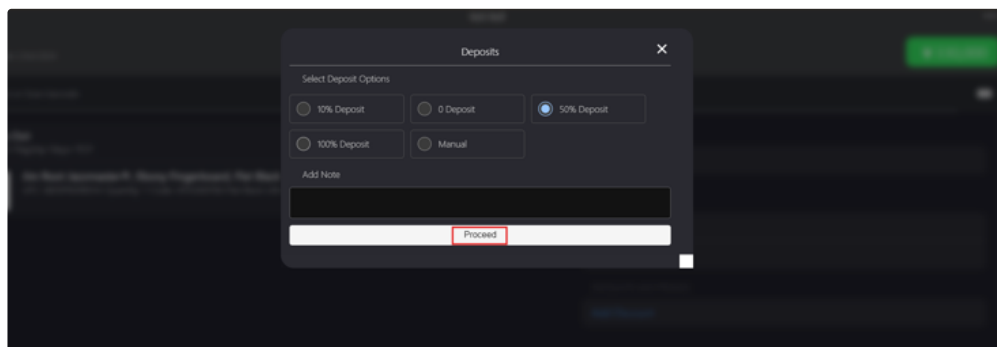
9. Select the deposit percentage from the **Deposits** dialog box.



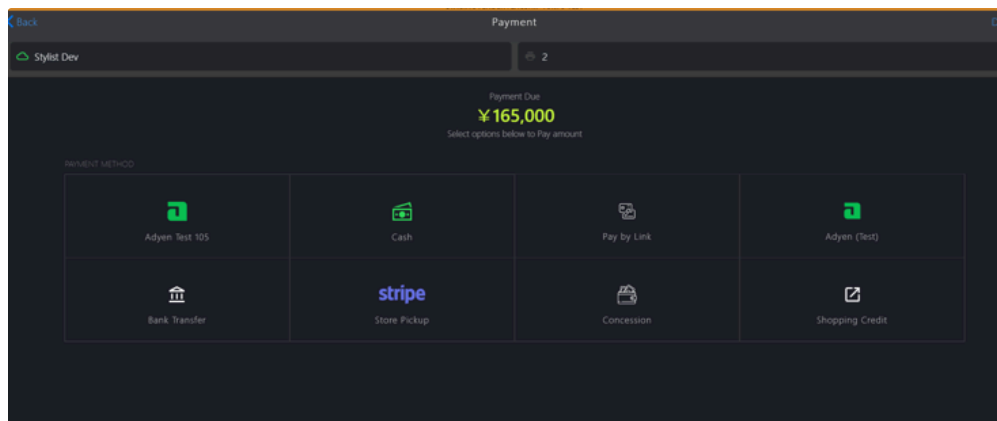
10. Enter the note in **Add Note** field (optional).



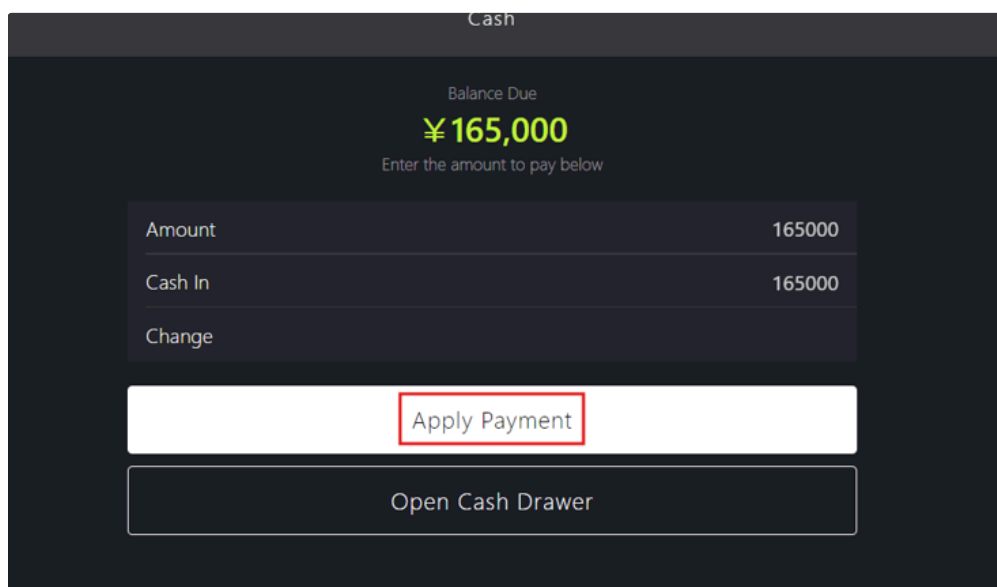
11. Click **Proceed** in the dialog box to apply the deposit percentage.



12. On the **Payment** page, select the payment method.



13. On the **Cash** page, click **Apply Payment**.



14. Click **Done** to finalize the reservation deposit for the requested item.



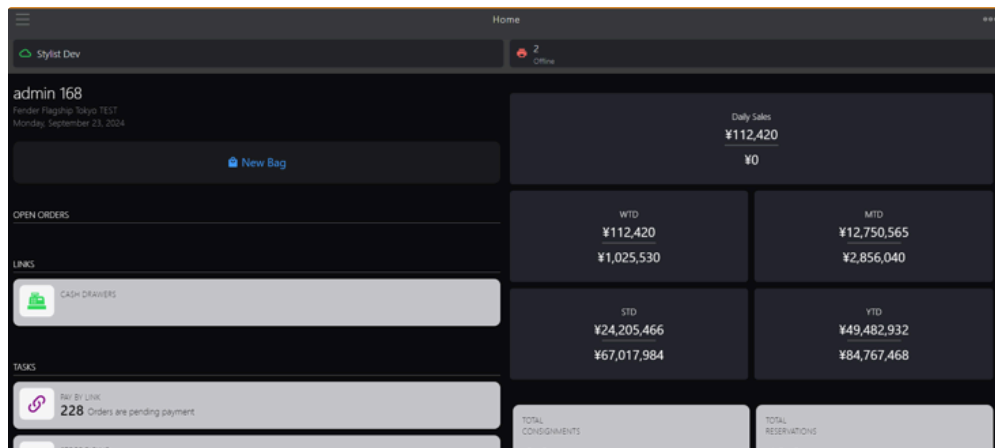
Applying Deposit for a reserved Item and Completing the Sale

Introduction

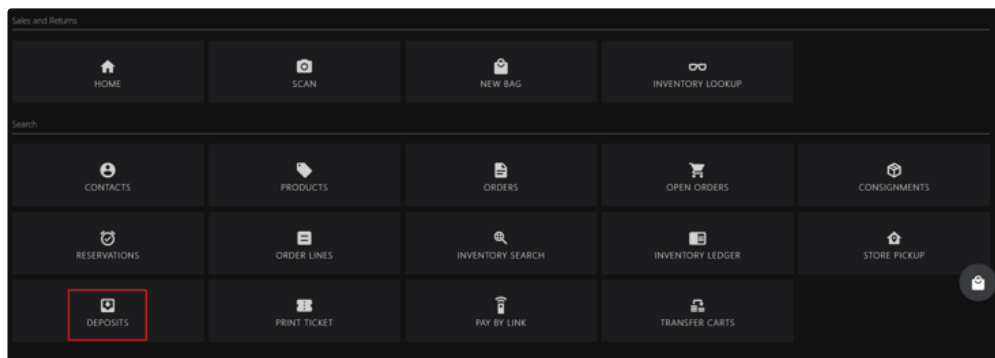
This topic explains the procedure for applying deposits to the reserved item to purchase a preordered item.

Steps to Apply Deposit for a Reserved Item and Completing the Sale

1. Click the burger menu.



2. Click **DEPOSITS**.



3. Search for the order number in the Customer Deposits using any of the following method:

- a. Enter the criteria in the search box, such as:

Time	Name	Status	Amount	Balance
Monday Sep 23, 2024				
08:57 PM	Test Ted	OPEN CART	¥ 165,000	¥ 165,000
07:36 PM	Lewis Hamilton Test	CLOSED	¥ 11,242	¥ 11,242
07:29 PM	Lewis Hamilton Test	OPEN CART	¥ 11,242	¥ 11,242
07:25 PM	Lewis Hamilton Test	OPEN CART	¥ 11,242	¥ 11,242
Thursday Sep 19, 2024				
07:41 AM	Reservation Test Deposit	CLOSED	¥ 275,000	
09:00 AM	Reservation Test Deposit		¥ 357,500	¥ 357,500

i. name

ii. category

iii. upc

iv. id

b. Scan the item barcode.

c. Apply the [filters](#) based on the category.

4. Select the order id from the list.

Customer Deposits

Search by name, category, upc or id

125 results found

Date	Time	Order ID	Amount	Balance
Monday Sep 23, 2024	08:57 PM	TSS2001874	¥ 165,000	¥ 165,000
	07:36 PM	TSS2001870	¥ 11,242	¥ 11,242
	07:29 PM	TSS2001868	¥ 11,242	¥ 11,242
	07:25 PM	TSS2001866	¥ 11,242	¥ 11,242
Thursday Sep 19, 2024	07:41 AM	TSS2001859	¥ 275,000	
	09:00	TSS2001853	¥ 357,500	¥ 357,500

5. Select the item using the checkbox.

test ted

Monday Sep 23 2024

ORDER # TSS2001873

Total ¥330,000

Reserved (1) Sold (0) Released (0)

Select All Show Selected

1 Item Selected

<input checked="" type="checkbox"/>	<p>Jim Root Jazzmaster®, Ebony Fingerboard, Flat Black Code: 0115300706 LPC: 885978399314 RESERVED</p>	¥ 330,000
-------------------------------------	--	-----------

AVAILABLE DEPOSITS

¥ 165,000 Sep 23, 2024
Order Id: TSS2001874

NOTE

Add Note

OMNICHANNEL REASON

Select Reason

CHARGES

Subtotal ¥ 300,000
Discount
Shipping ¥ 0

6. Click **More** on the bottom bar.

test ted

Monday Sep 23 2024

ORDER # TSS2001873

Total ¥330,000

Reserved (1) Sold (0) Released (0)

Select All Show Selected

0 Items Selected

<input type="checkbox"/>	<p>Jim Root Jazzmaster®, Ebony Fingerboard, Flat Black Code: 0115300706 LPC: 885978399314 RESERVED</p>	¥ 330,000
--------------------------	--	-----------

AVAILABLE DEPOSITS

¥ 165,000 Sep 23, 2024
Order Id: TSS2001874

NOTE

Add Note

OMNICHANNEL REASON

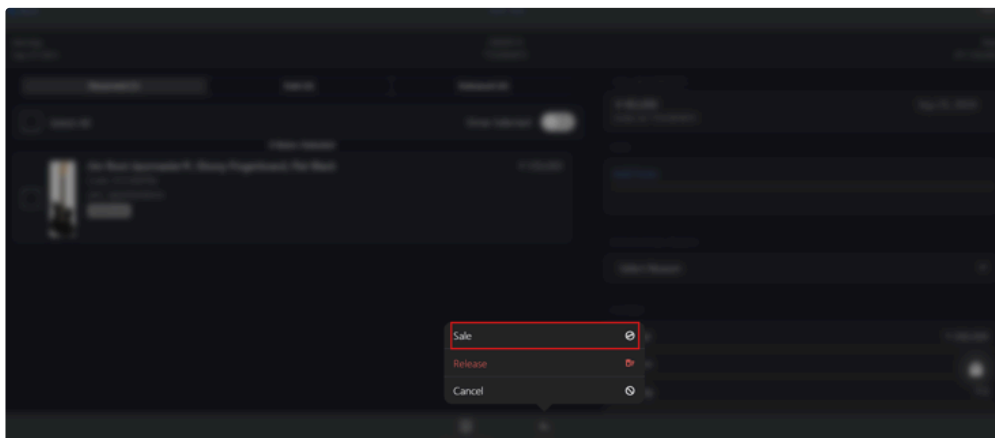
Select Reason

CHARGES

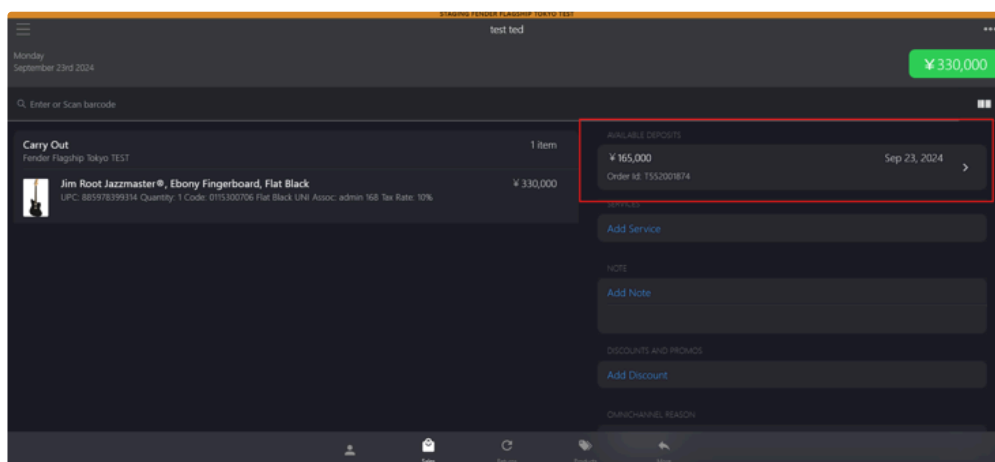
Subtotal ¥ 300,000
Discount
Shipping ¥ 0

More

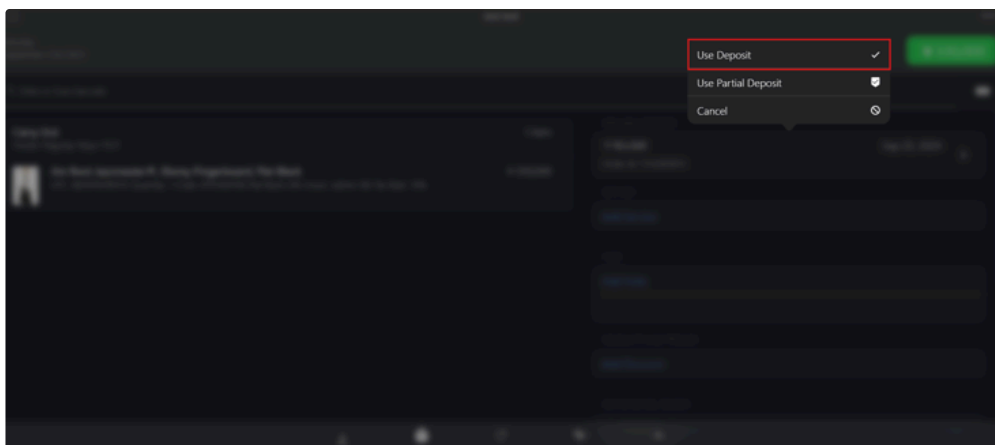
7. Select **Sale** from the pop-up menu.



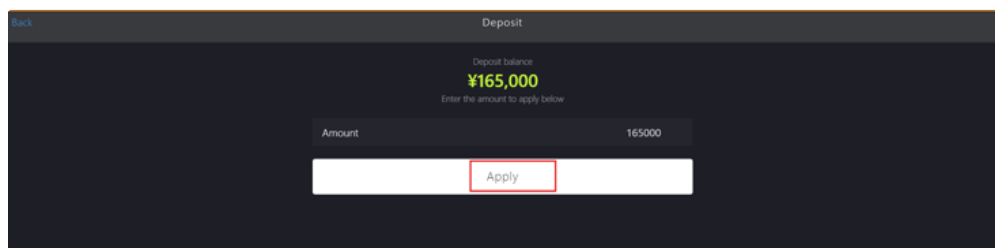
8. Click **Available Deposits**.



9. Select **Use Deposit** from the pop-up menu.

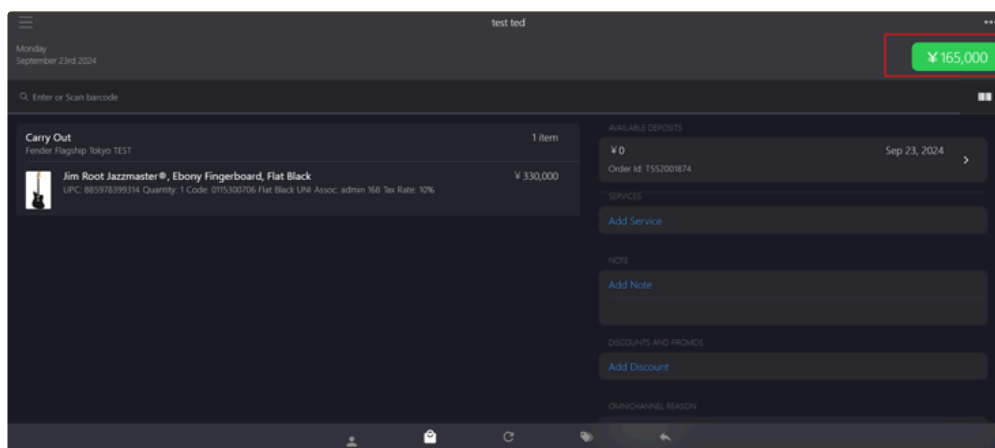


10. Click **Apply**.

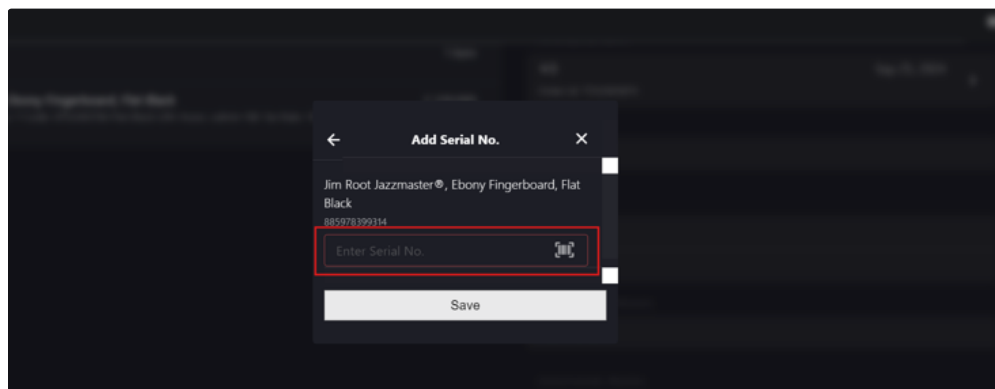


11. Click the green button on the upper-right corner.

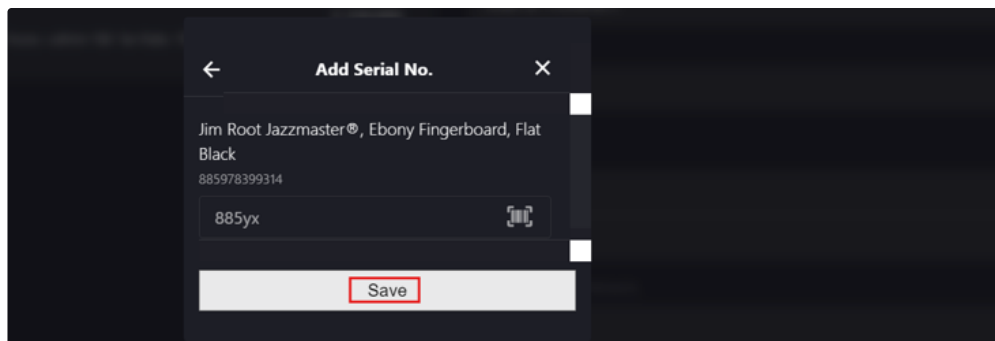
Note: After applying a 50% deposit, the customer will need to pay the adjusted balance.



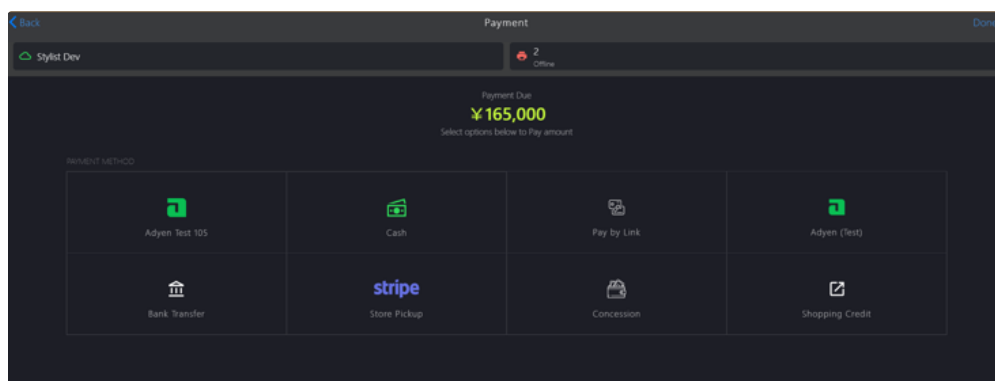
12. In the **Add Serial No.** dialog box, enter the item serial number in the **Enter Serial No** field.



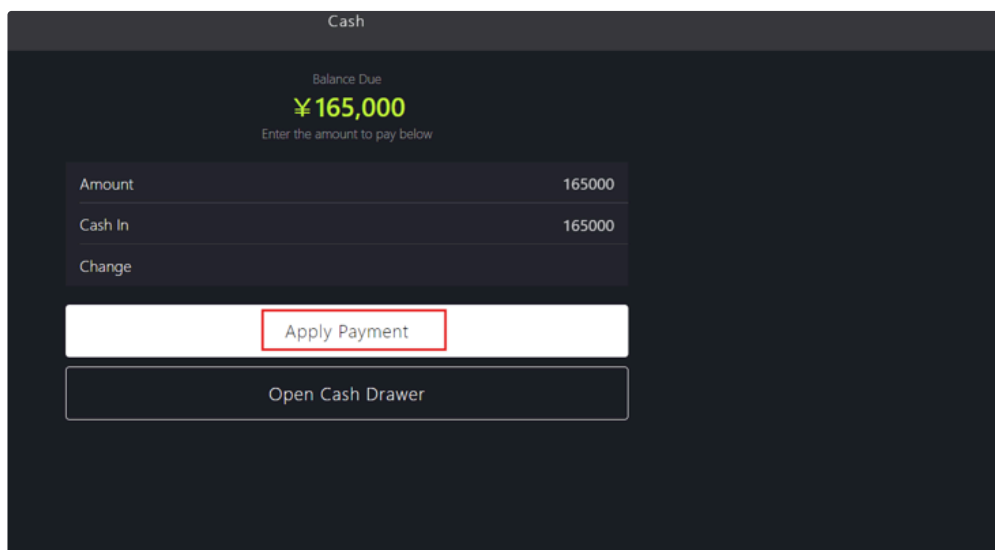
13. Click **Save** in **Add Serial No.** dialog box.



14. Select the appropriate payment method.



15. Click **Apply Payment**.



16. Click **Done** to close the sale.

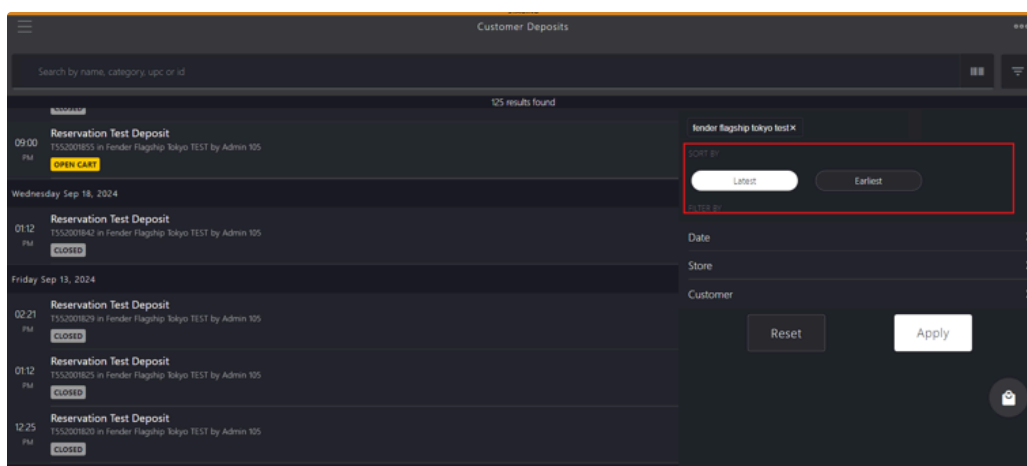
Built-in Deposit Filter

Introduction

Built-in deposit filter enhance the search experience with the drop-down menu filter category. You can tailor and sort the results to meet your precise requirements by selecting and applying specific criteria.

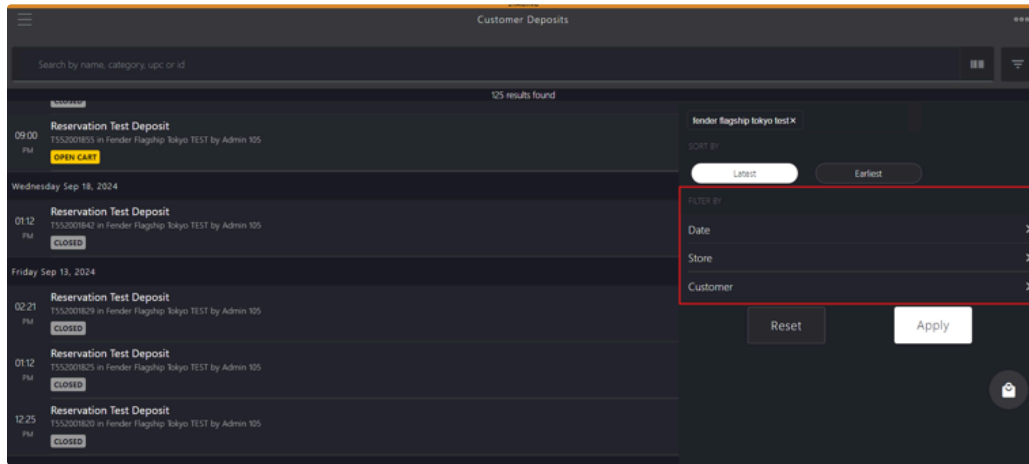
Filter Features

Sorting



Sorting Criteria	Description
Latest	Select the Latest option to view orders from the most recent date to the oldest.
Earliest	Select the Earliest option to view orders from the oldest date to the most recent.

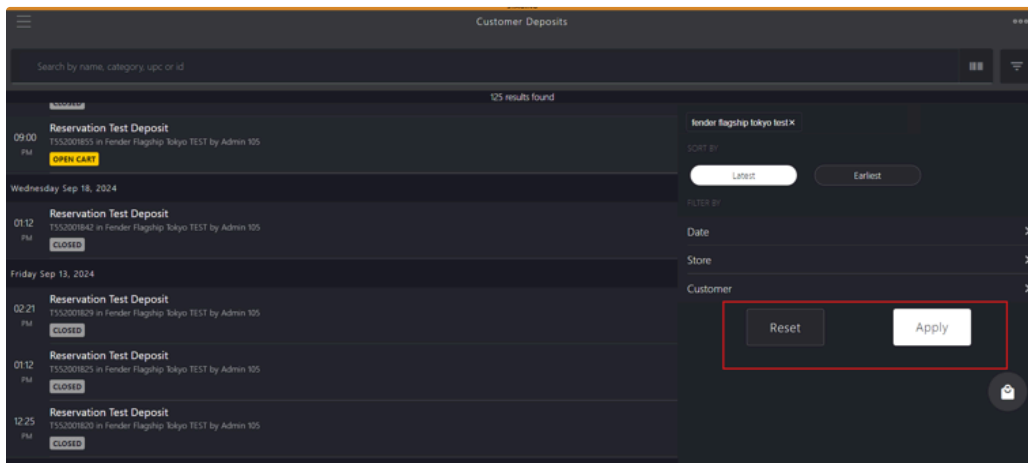
Filter



Filter Category	Description
<p data-bbox="488 848 553 877">Date</p>	<p data-bbox="756 848 1284 982">Select Custom Range or Quick Link options to search for orders by the date they were generated.</p> <ol data-bbox="756 1087 1284 1955" style="list-style-type: none"> <li data-bbox="756 1087 1284 1478">1. Custom Range: Select a date range when the order was generated. <ol data-bbox="792 1241 1284 1478" style="list-style-type: none"> <li data-bbox="792 1241 1284 1325">a. Start: Click the start date field to select the date from the calendar. <li data-bbox="792 1346 1284 1478">b. End: Click the end date field to select the end date from the calendar. <li data-bbox="756 1556 1284 1955">2. Quick Links: Select from one of the following options when the order was generated: <ol data-bbox="792 1759 1019 1955" style="list-style-type: none"> <li data-bbox="792 1759 906 1789">a. Today <li data-bbox="792 1810 959 1839">b. Yesterday <li data-bbox="792 1860 1008 1890">c. Week to Date <li data-bbox="792 1911 1019 1940">d. Month to Date

	e. Year to Date
Store	Select the checkbox for the store where the orders were generated.
Customer Name	Search for the order by entering the customer's full name in the Enter Customer Last Name field who placed the order.

Action Buttons



Action Buttons	Description
Apply	Click the Apply button to apply filter criteria and display the requested order or orders list.
Reset	

Click the **Reset** button to remove all the applied filters and return to default view.

Consignment

A consignment is a business agreement where a **retailer (consignor)** entrusts products to a **customer (consignee)**. The retailer maintains ownership of the products until they are purchased by a **customer**.

The consignment model practiced by our clients.

In this model, luxury products are provided to celebrities for selection. The items are typically taken out of the premises of the brand, maybe to the celebrity's residence, for evaluation. The celebrity purchases only the items they desire to keep, and the rest is returned to the brand. This model provides a personalized high-end experience catering to celebrity clients.

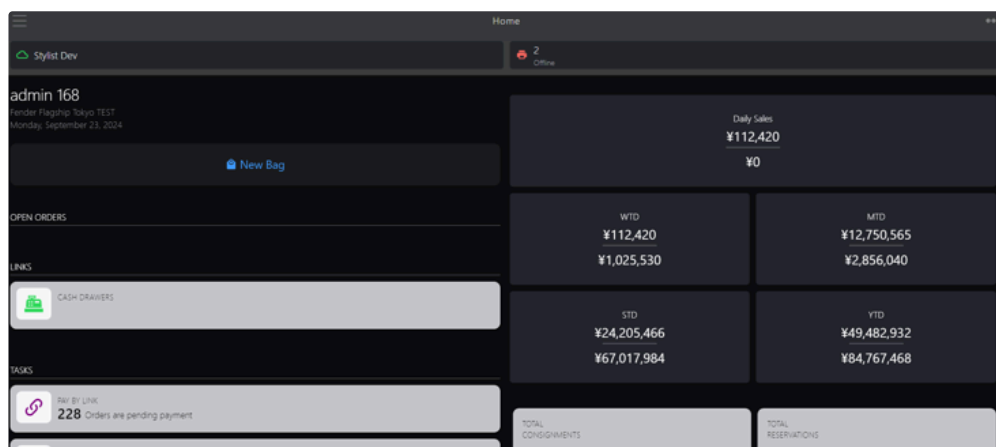
Creating a Consignment

Introduction

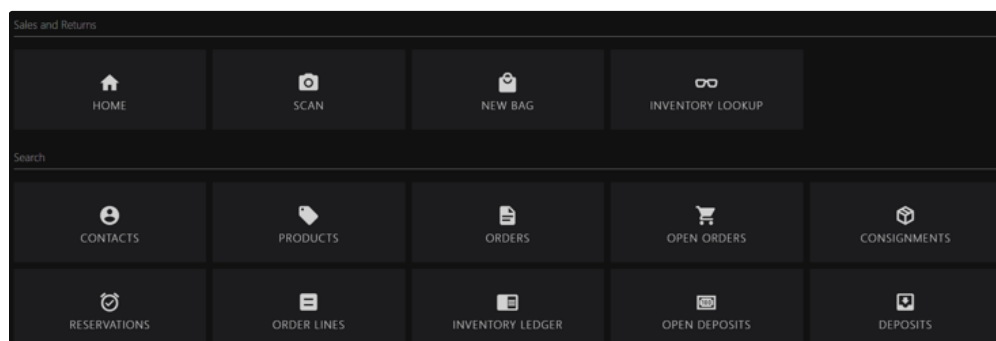
This topic explains the procedure for creating a consignment when a customer requests a sales associate select the items for their consideration.

Steps to Create a Consignment

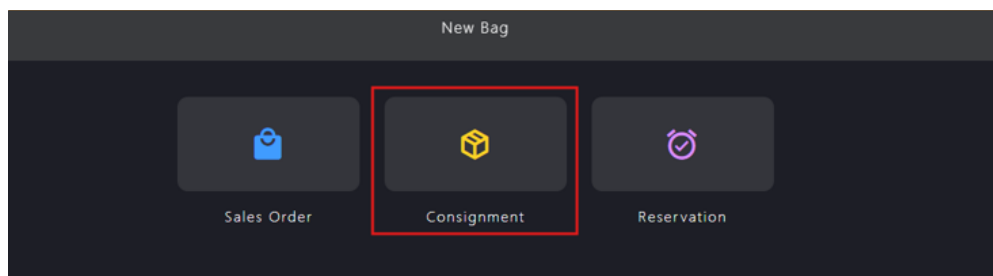
1. Click the burger menu.



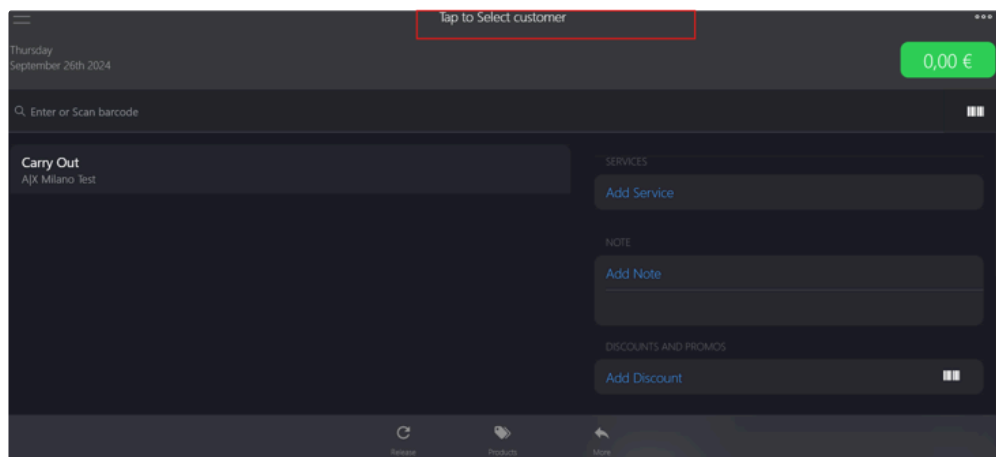
2. Click **New Bag**.



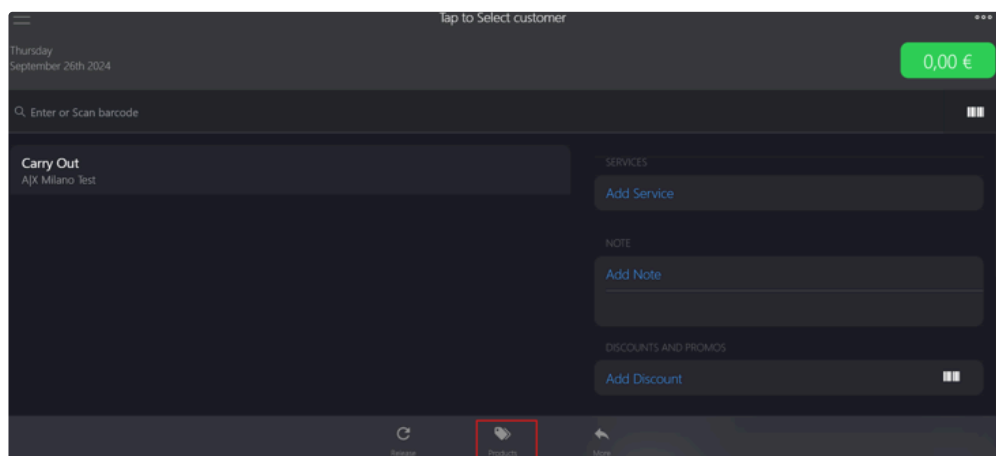
3. Click **Consignment**.



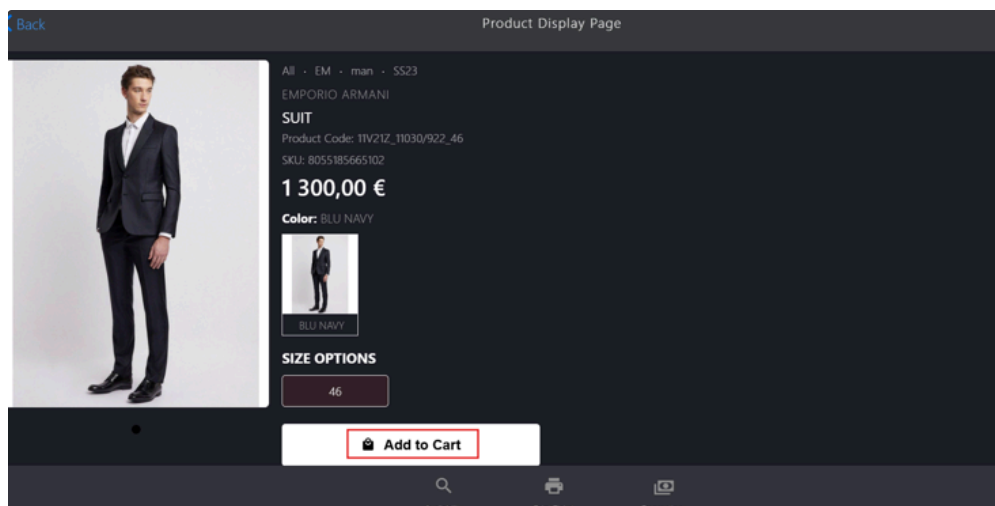
4. Click **Tap to Select customer** to add the customer.



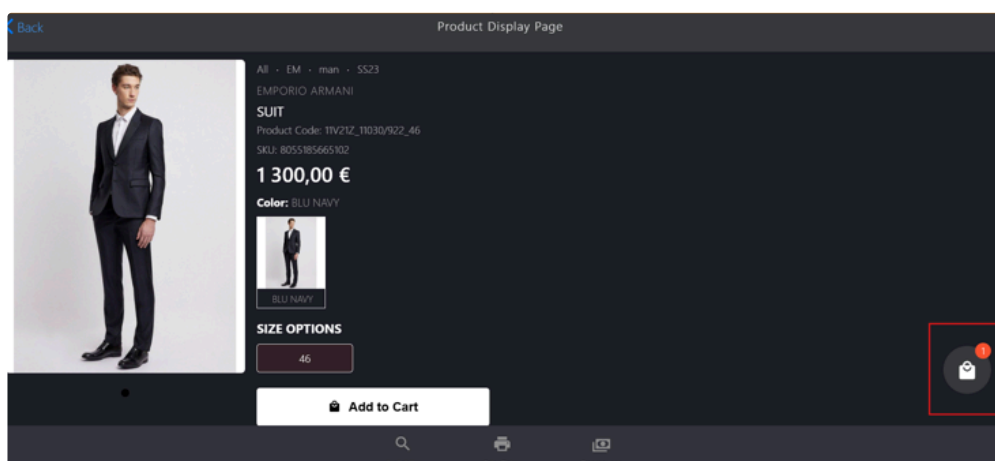
5. Click **Products** on the bottom bar to select the item.



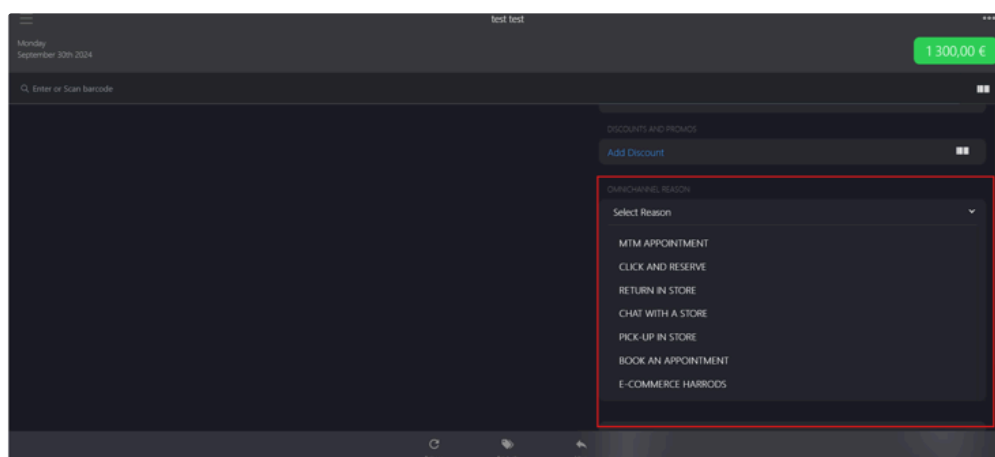
6. Click **Add to Cart**.



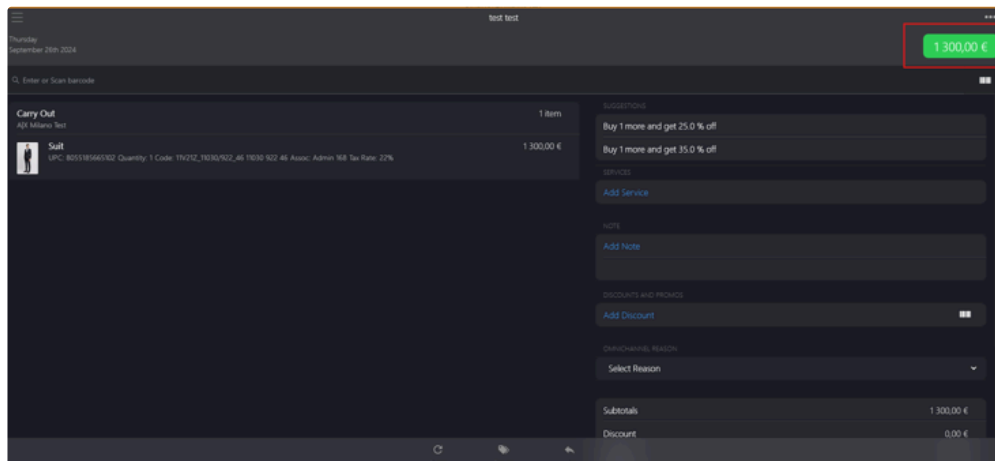
7. Click the bag icon to navigate back to the consignment page.



8. Select a reason from **OMNICHANNEL REASON** dropdown menu.



9. Click the green button in the upper-right corner.



10. Click **Done** to complete the consignment.



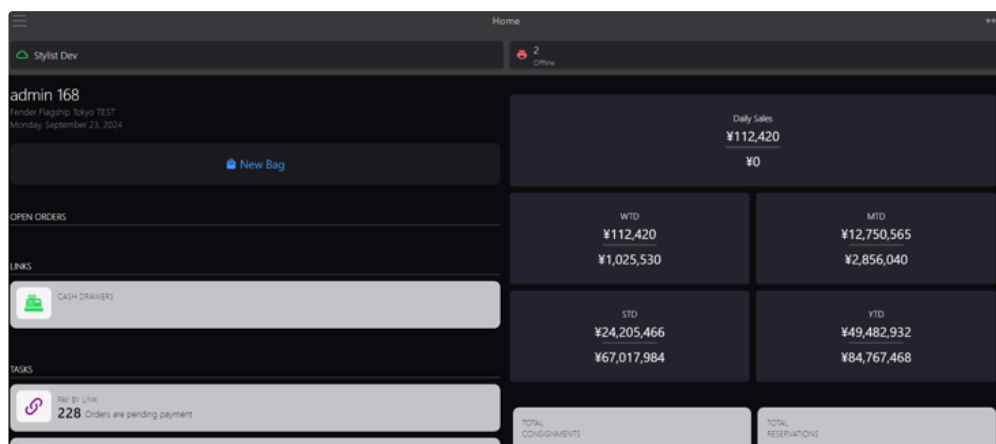
Creating Sale from a Consignment

Introduction

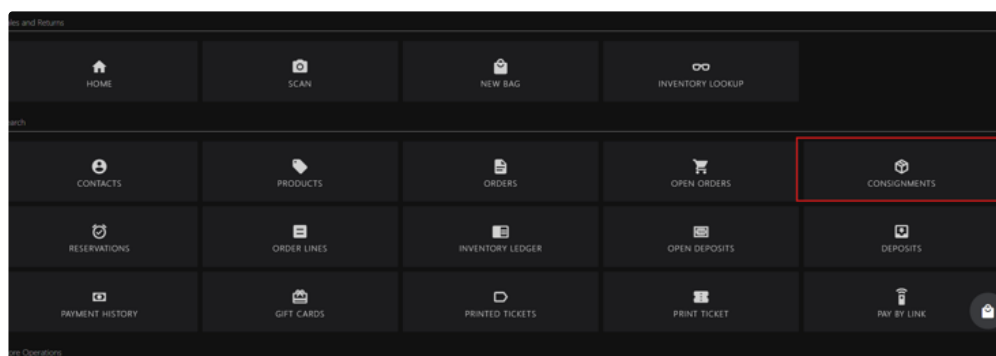
This topic explains the procedure when a customer proceeds with the purchase from a consignment.

Steps to Create a Sale for Reserved Item

1. Click the burger menu.

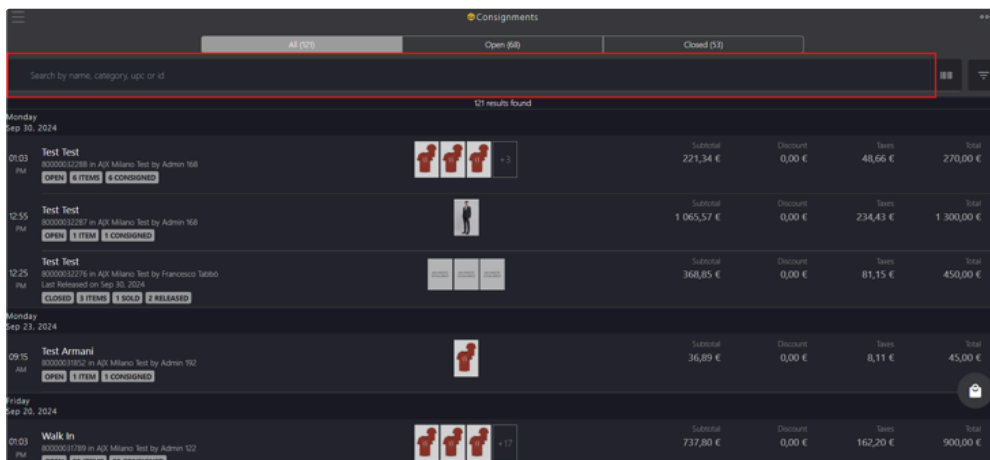


2. Click **CONSIGNMENTS**.



3. Search for the consigned orders using any of the following methods:

a. Enter any of the following criteria in the search box:



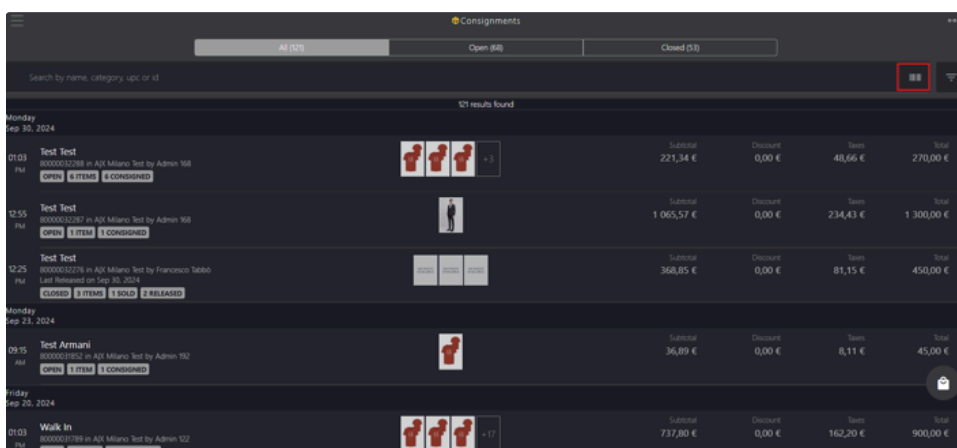
i. **name:** Enter the customer's name.

ii. **category:** Enter the reservation cart status (**Open, Closed, or Partially Closed**).

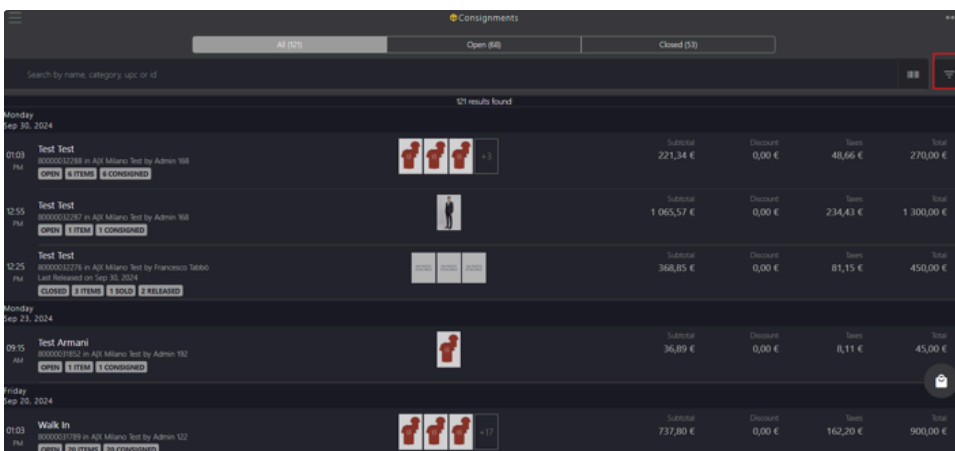
iii. **upc:** Enter the item's UPC.

iv. **id:** Enter the order id.

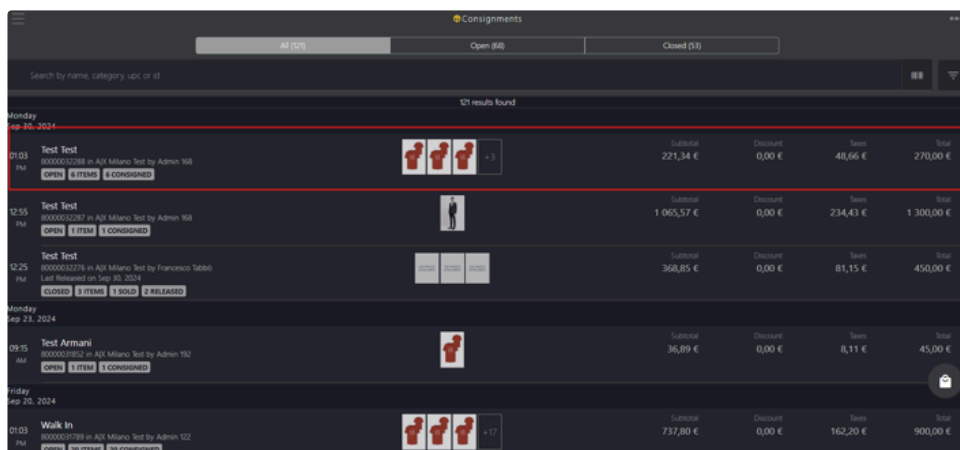
b. Scan the item barcode.



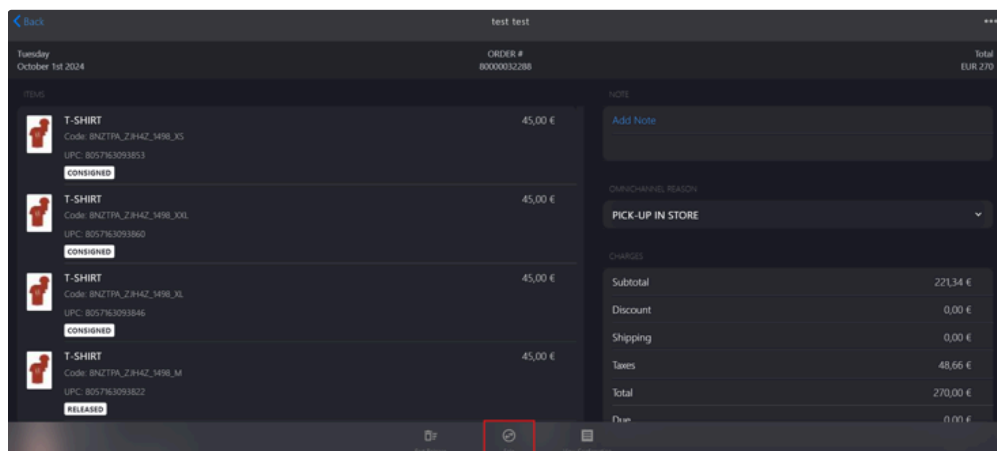
c. Apply the [filters](#) based on the category.



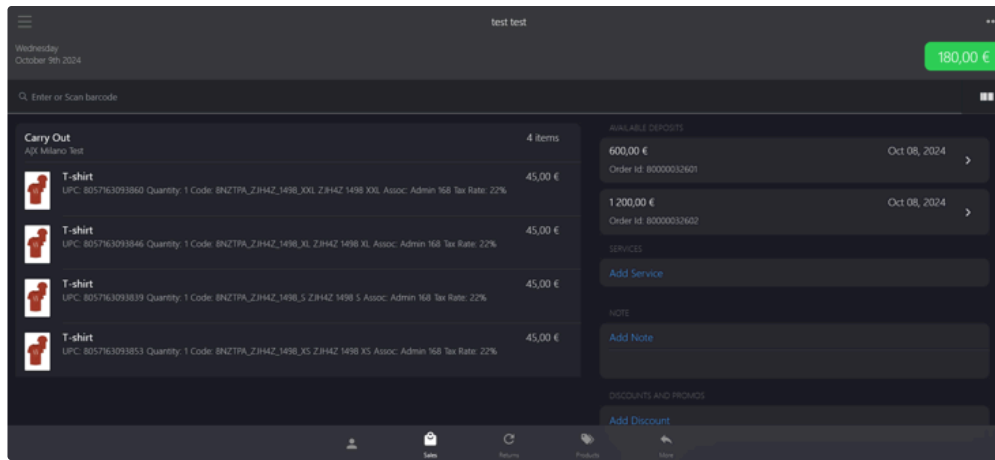
4. Select the order number from the list.



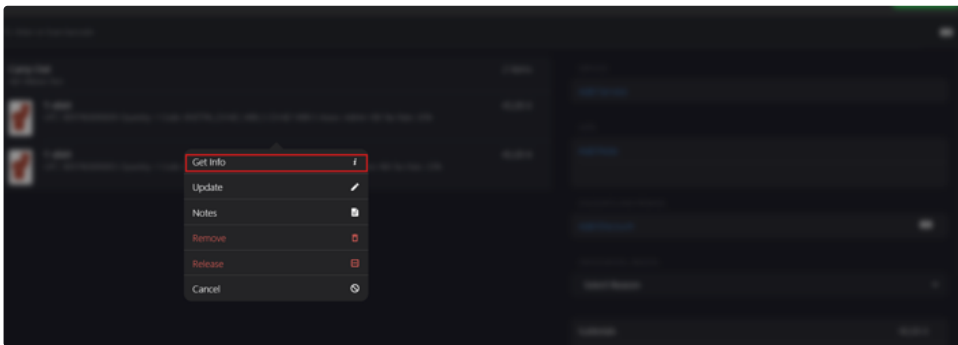
5. Click **Sale** on the bottom bar to purchase the item.



6. Click the item to perform the following item level change:



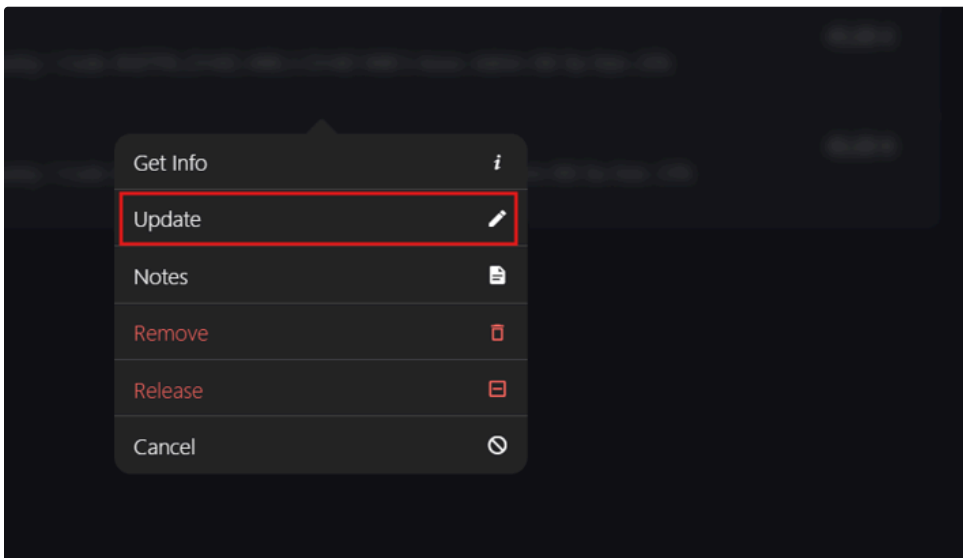
a. Select **Get Info** from the pop-up menu to view item details:



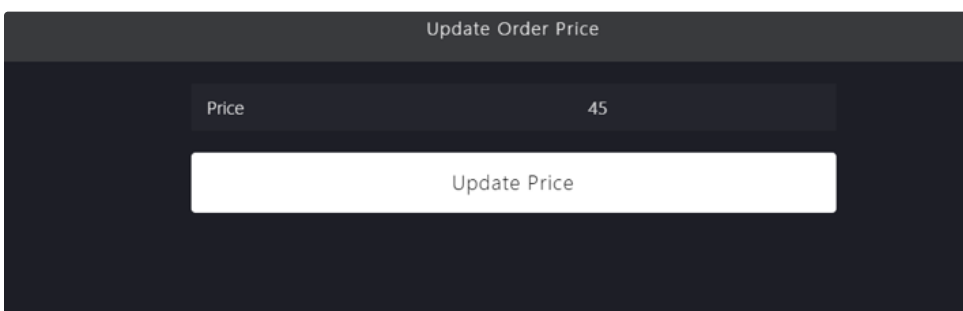
- i. **View Product:** Displays the item information.
- ii. **Action:** Displays purchase status, for example, Buy.
- iii. **Delivery:** Displays the current delivery stage of the item.
- iv. **Sales Associate:** Displays the associate's name handling the sale.
- v. **Unit Price:** Displays the item's price.
- vi. **Quantity:** Displays the number of items ordered.
- vii. **Inventory Location:** Displays the consigned item's store location.
- viii. **Charges:** Displays the item and shipping amounts.
- ix. **Taxes:** Displays applied tax amount.
- x. **Total:** Displays total amount including taxes.
- xi. **Paid:** Displays the total amount to be paid.
- xii. **Due:** Displays the amount due to the retailer.

b. **Update item price**

- i. Select **Update** from the pop-up menu to change the item price.

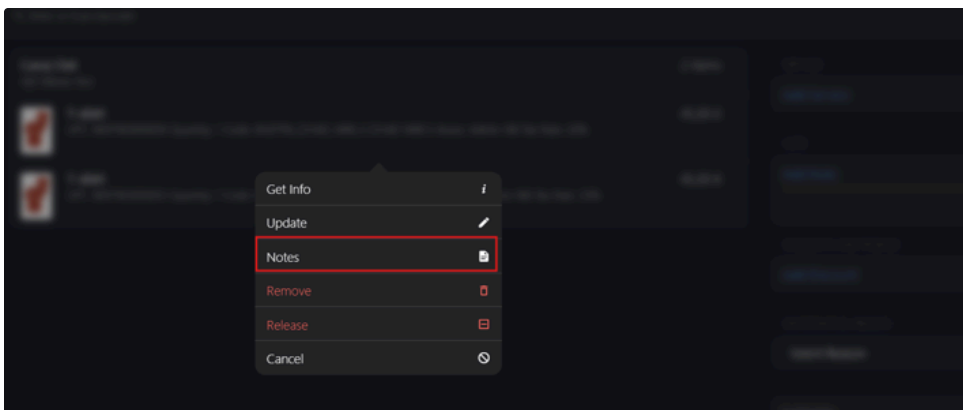


- ii. Click **Update Price** to change the item price.

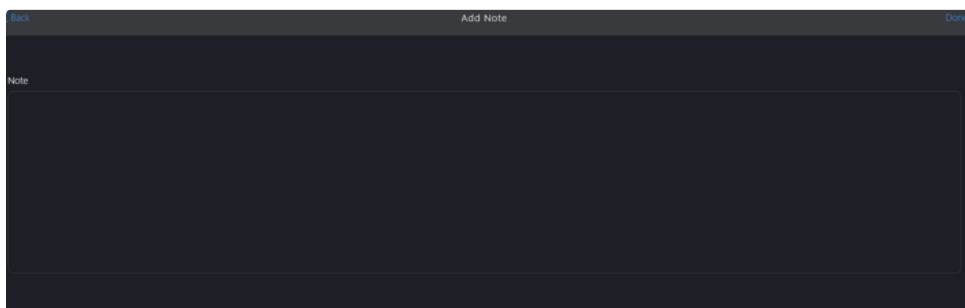


c. **Add notes**

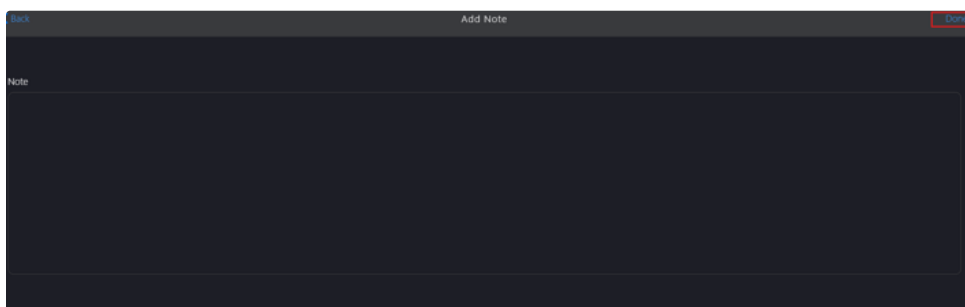
- i. Select **Notes** from the pop-up menu to add specific customer requests or unique notes related to item delivery.



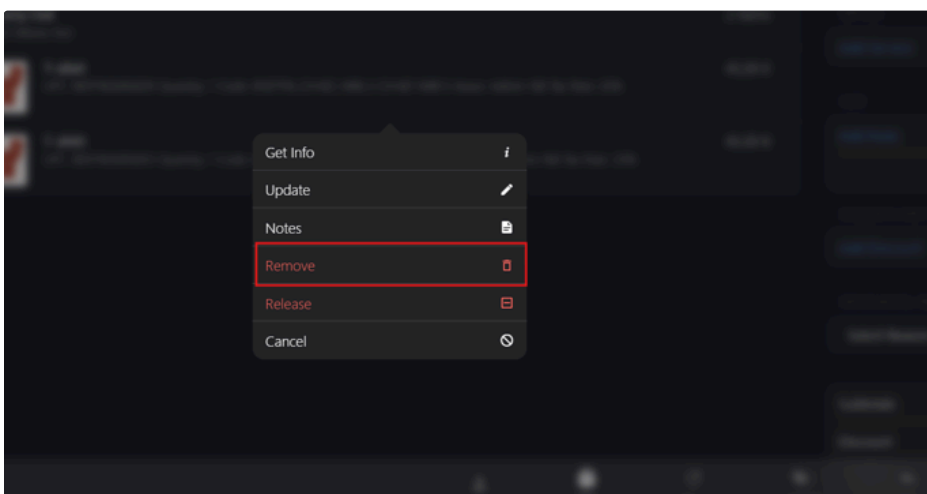
ii. Enter the note in the note field.



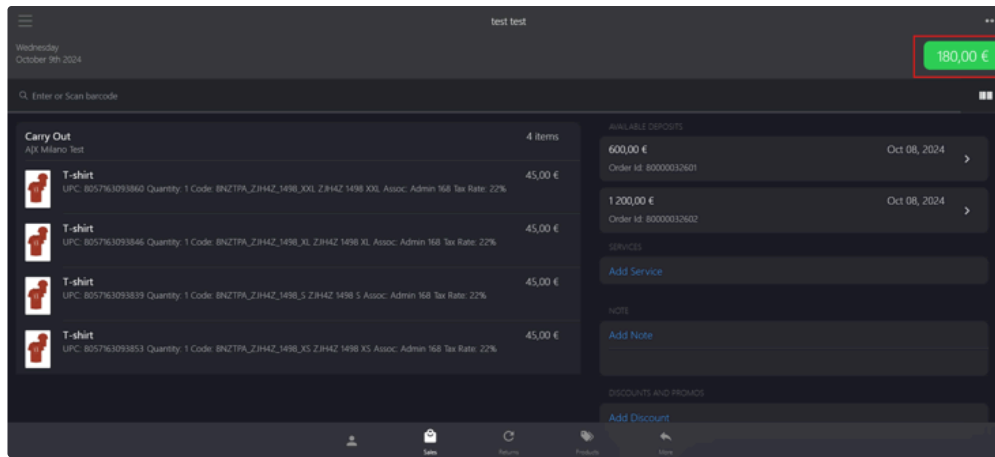
iii. Click **Done** to add the note.



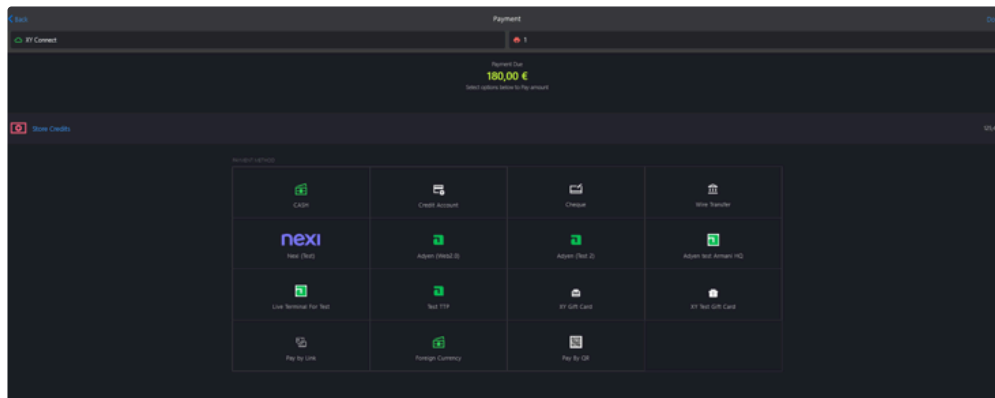
d. Select **Remove** from the pop-up menu to remove the item from the sales cart.



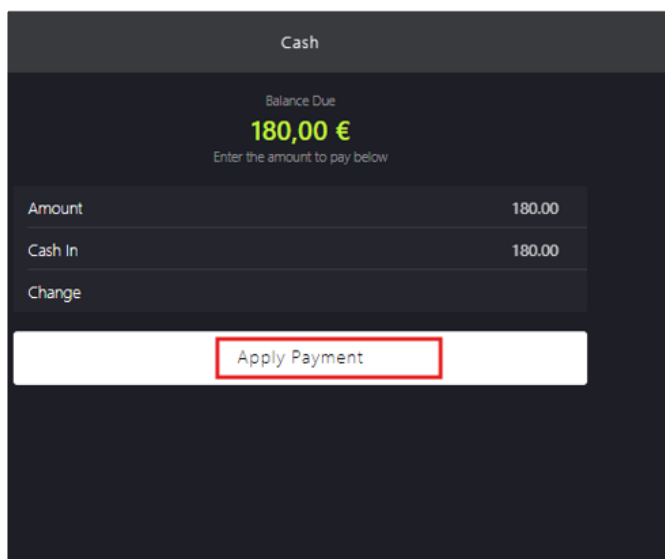
7. Click the green button in the upper right corner.



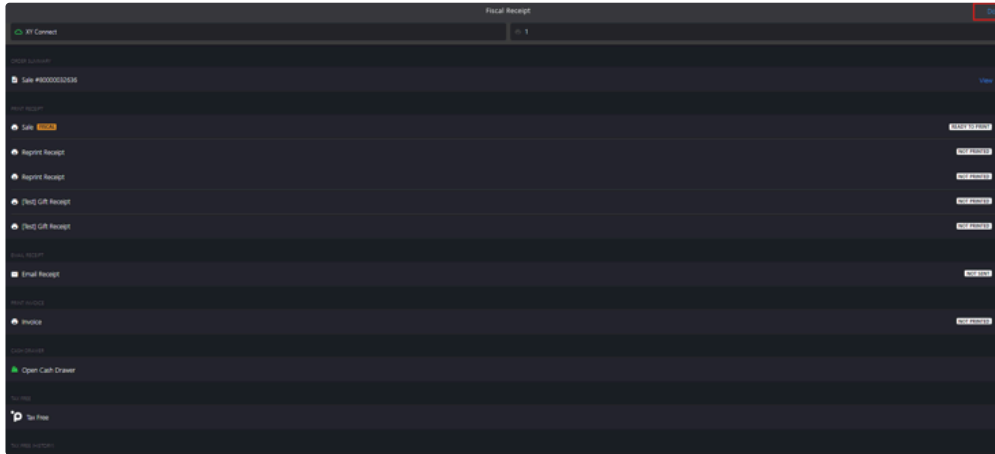
8. Select the appropriate payment method.



9. Click **Apply Payment** to complete the transaction.



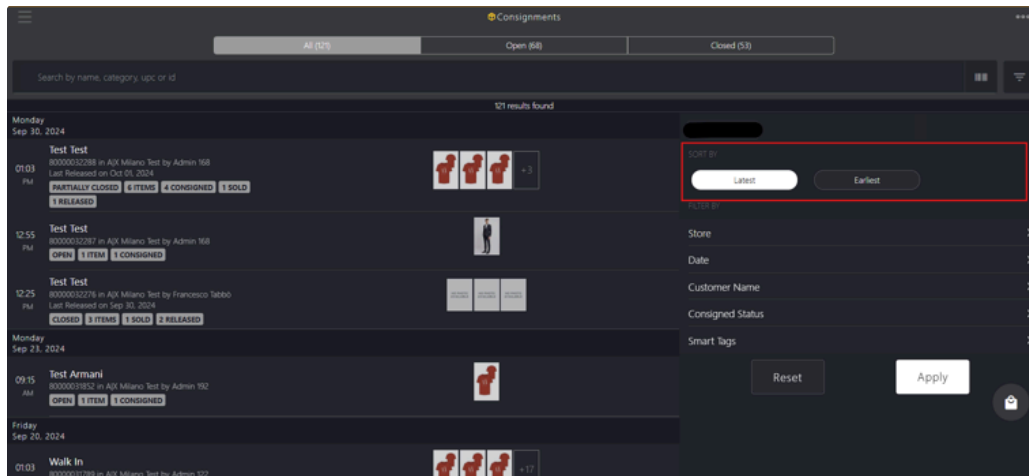
10. Click **Done** to complete the sale.



Built-in Consignment Filter

Built-in consignment filter enhance the search experience with the drop-down menu filter category. You can tailor and sort the results to meet your precise requirements by selecting and applying specific criteria.

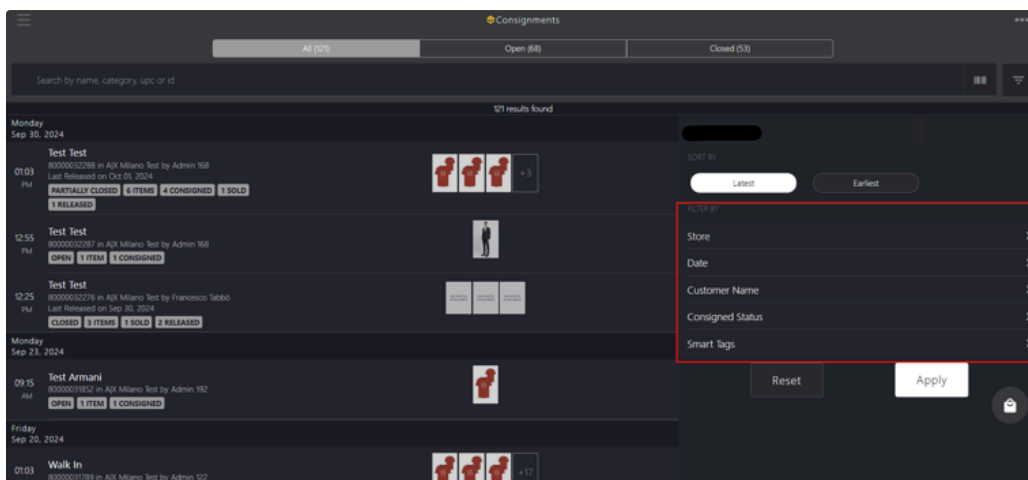
Filter Features



Sorting

Sorting Criteria	Description
Latest	Select the Latest option to view orders from the most recent date to the oldest.
Earliest	Select the Earliest option to view orders from the oldest date to the most recent.

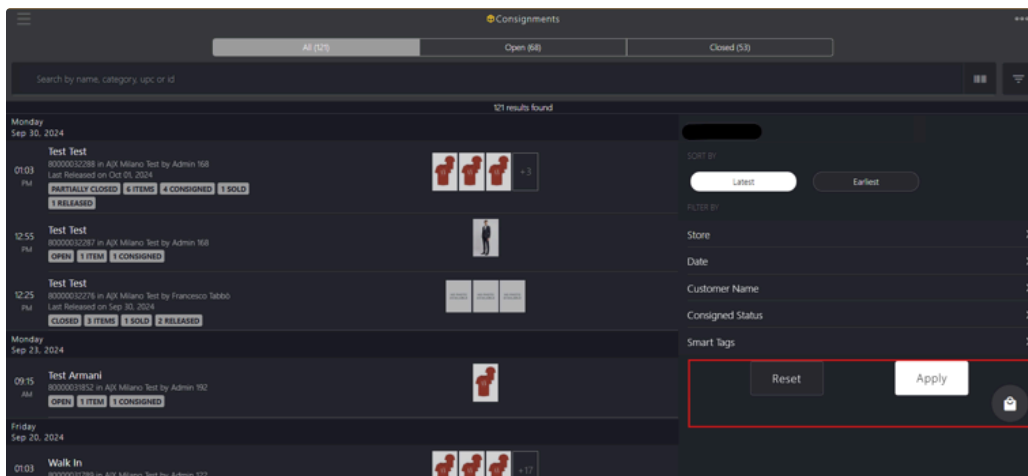
Filter



Filter Category	Description
Store	Select the checkbox for the store where the item reservation was done.
Date	<p>Select Custom Range or Quick Link options to search for orders by the date they were generated.</p> <ol style="list-style-type: none"> Custom Range: Select a date range when the order was generated. <ol style="list-style-type: none"> Start: Click the start date field to select the date from the calendar. End: Click the end date field to select the end date from the calendar. Quick Links: Select from one of the following options when the order was generated: <ol style="list-style-type: none"> Today Yesterday Week to Date

	<p>d. Month to Date</p> <p>e. Year to Date</p>
<p>Customer Name</p>	<p>Search for the reservation by entering the customer's full name in the Enter Customer Last Name field, or select the customer from the list using the checkbox.</p>
<p>Consigned Status</p>	<p>Search for the consignment by entering the status in the Search by Consigned Status field or selecting the appropriate status check box.</p>
<p>Smart Tags</p>	<p>Search for the tags by entering the smart tags in Search by Smart Tags field or selecting the appropriate checkbox.</p>

Action Buttons



Action Buttons	Description
<p>Apply</p>	<p>Click the Apply button to apply filter criteria and display the requested</p>

	order or orders list.
Reset	Click the Reset button to remove all the applied filters and return to the default view.

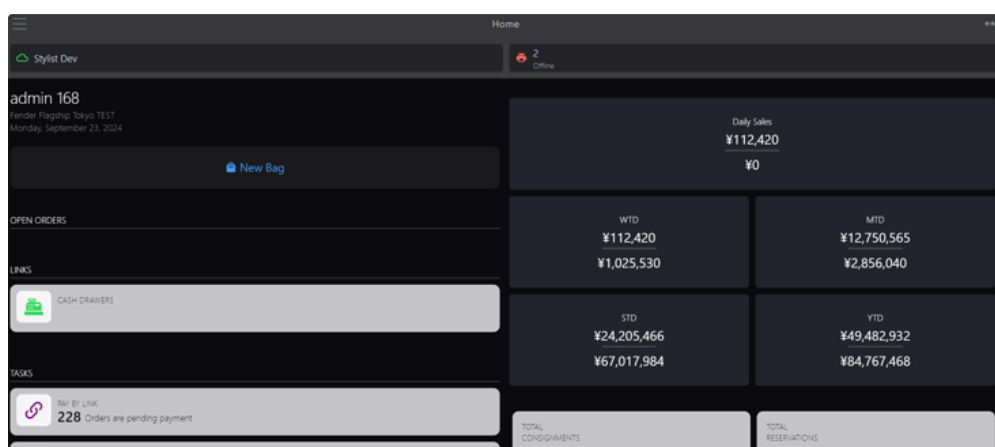
Releasing Items from Consignment

Introduction

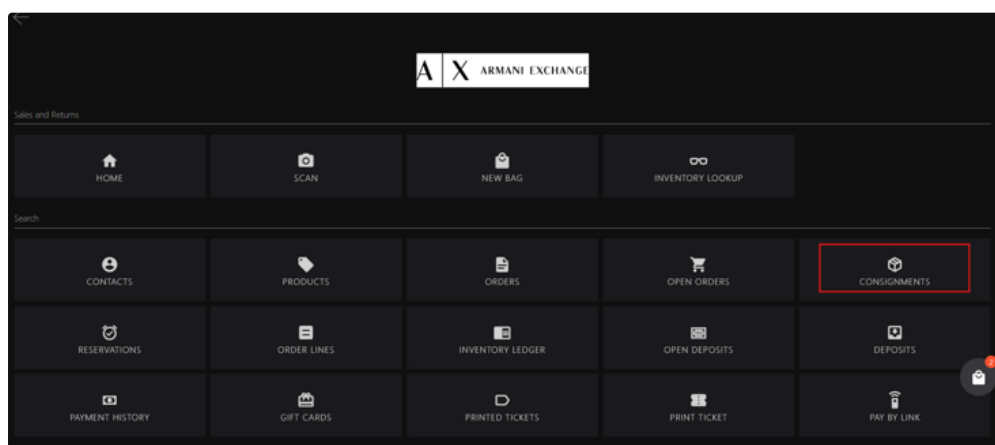
This topic explains the procedure of releasing items from a consignment.

Steps to Release an Item from a Reservation

1. Click the burger menu.

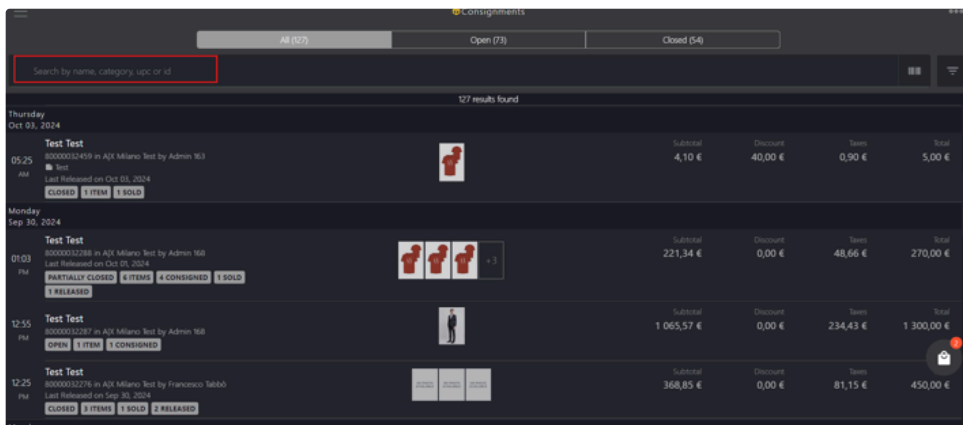


2. Click **CONSIGNMENTS**.



3. Search for the order using any of the following methods:

a. Enter any of the following criteria in the search box:



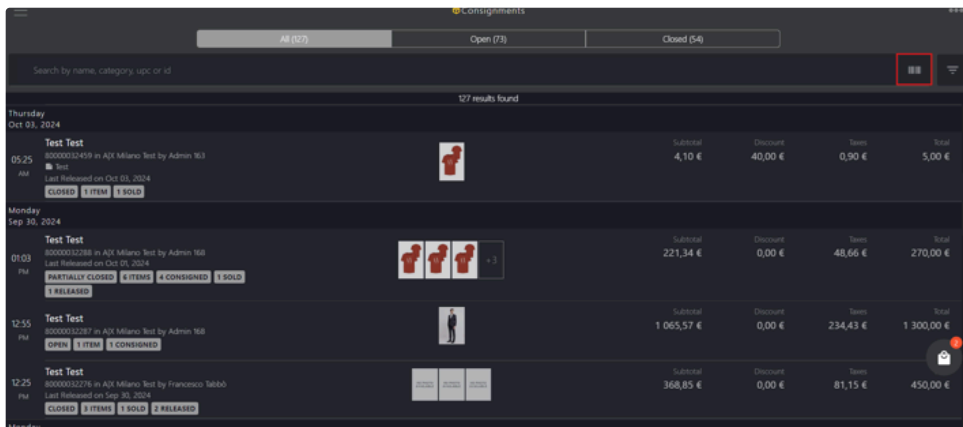
i. **name:** Enter the customer's name.

ii. **category:** Enter the reservation cart status (**Open, Closed, or Partially Closed**).

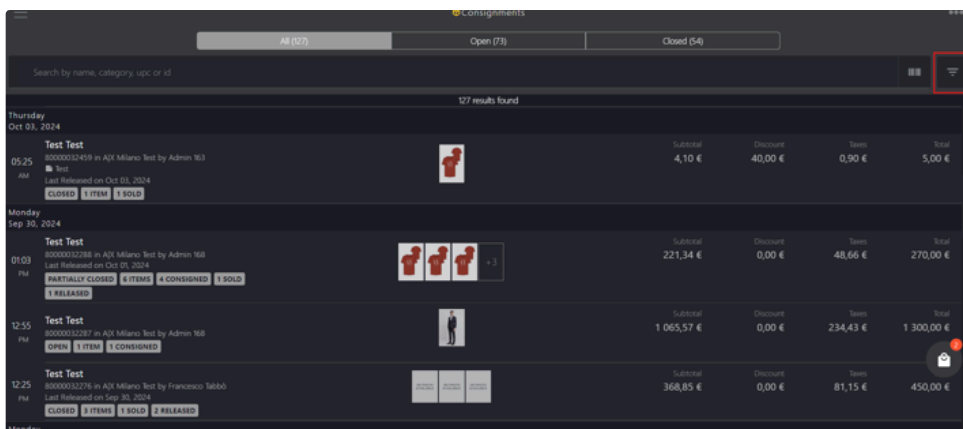
iii. **upc:** Enter the item's UPC.

iv. **id:** Enter the order id.

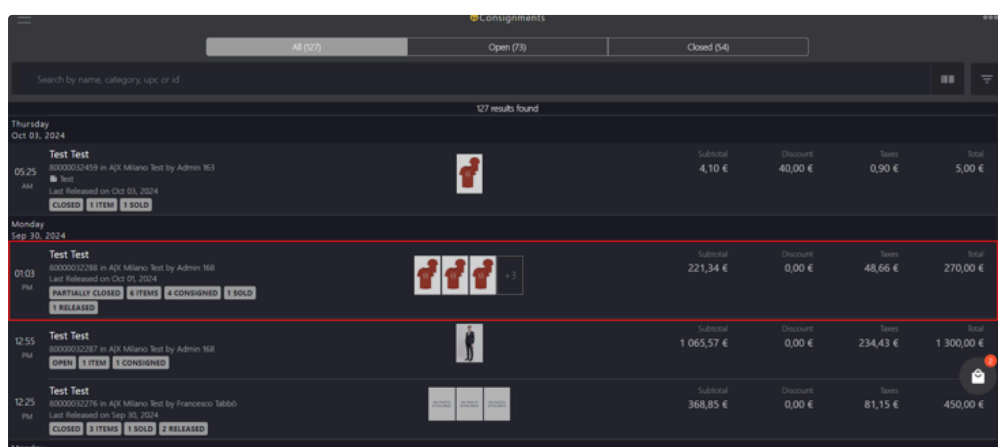
b. Scan the item barcode.



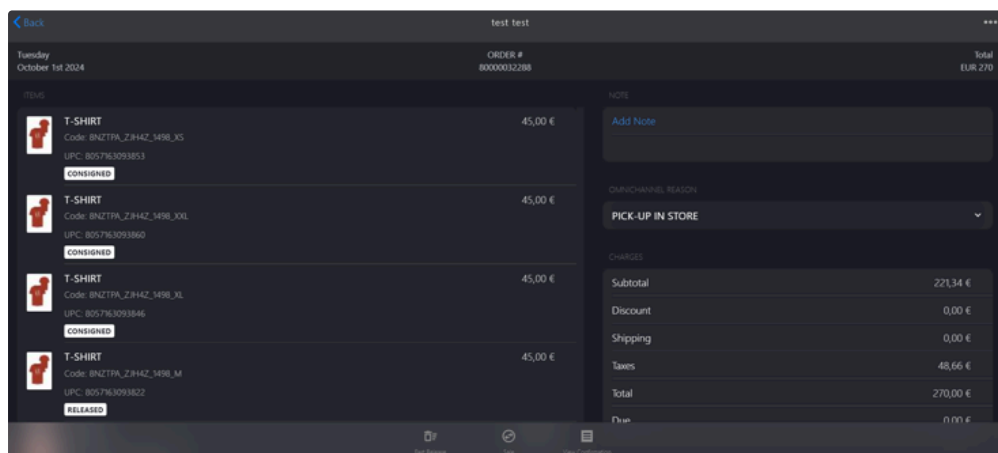
c. Apply the [filters](#) based on the category.



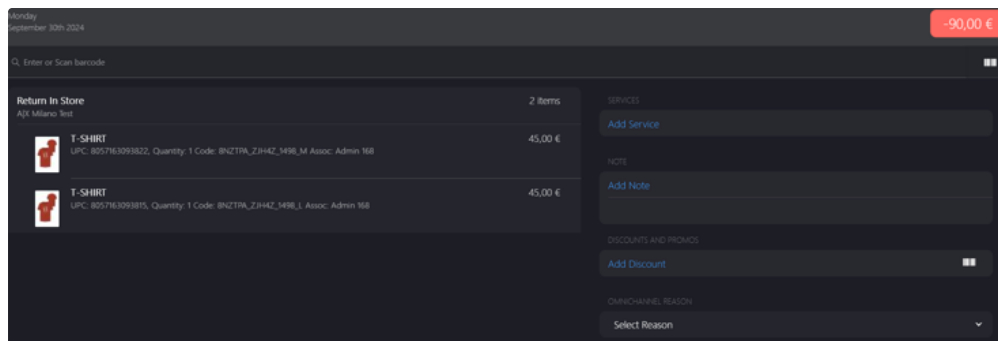
4. Select the order number from the list.



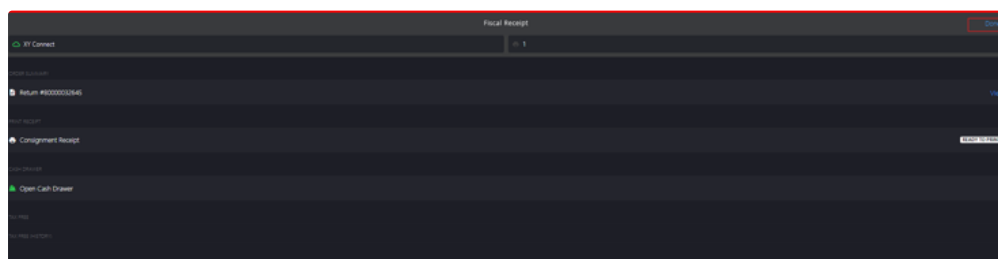
5. Click **Fast Release** on the bottom bar to release all the items



7. Click red button in the upper-right corner.



8. Click **Done** to complete the item release.



Gift Registry

Gift Registry is a feature that allows customers to create an account to receive monetary contributions from friends, family, or themselves for holidays or special occasions, for example, weddings, birthdays, etc. This account will serve as a gift deposit fund from which the customer or designated recipient can purchase the items of their choice from the respective brand's store. However, the intended recipient(s) must be a registered member of the respective brand.

- [Creating a Self Gift Registry Account](#)
- [Creating Friends and Family Gift Registry Account](#)
- [Verifying New Gift Registry Account](#)
- [Adding Deposit to Gift Registry Account](#)
- [Redeeming Deposit from Gift Registry Account](#)

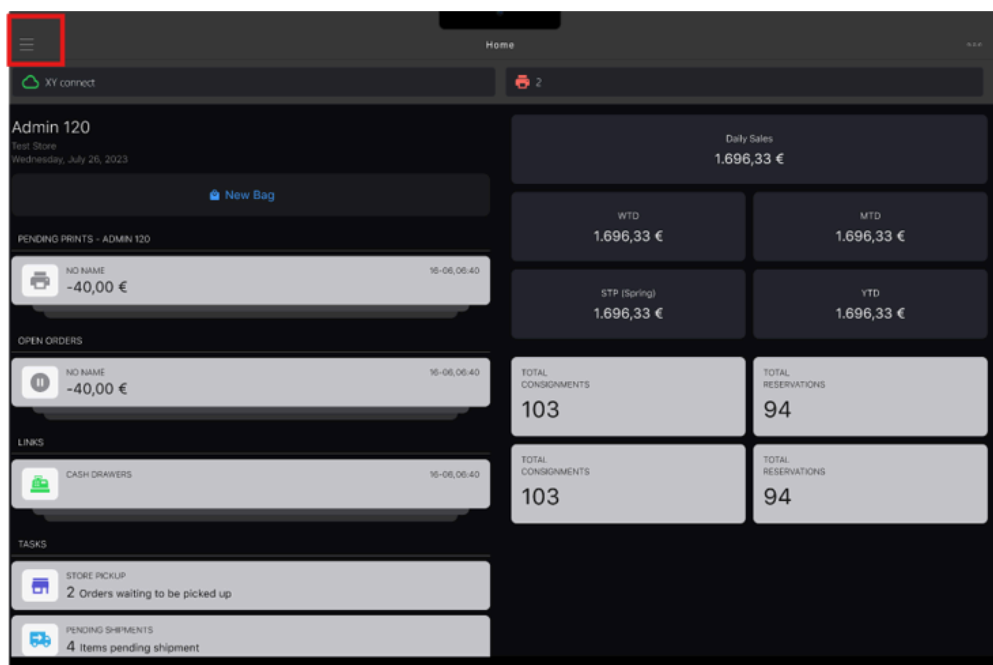
Creating a Self Gift Registry Account

Introduction

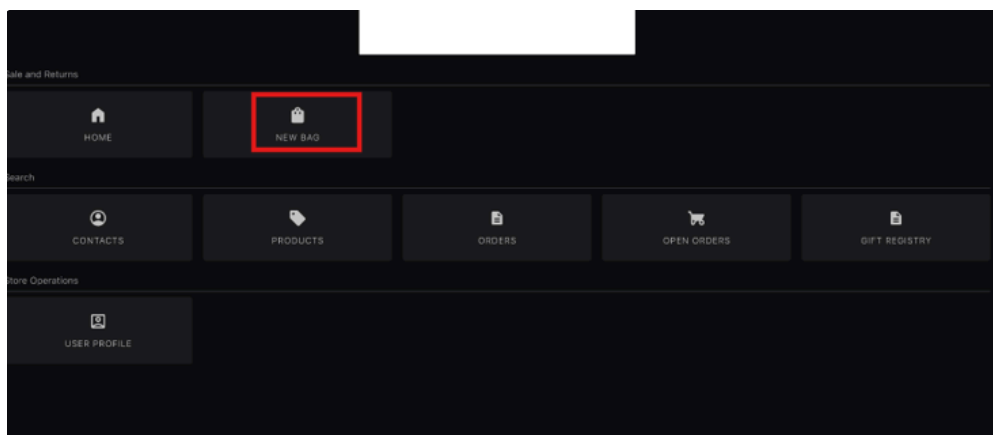
This topic explains the procedure of how to create a self gift registry account when a customer requests to create a new account for themselves.

Steps to Create a Self Gift Registry Account

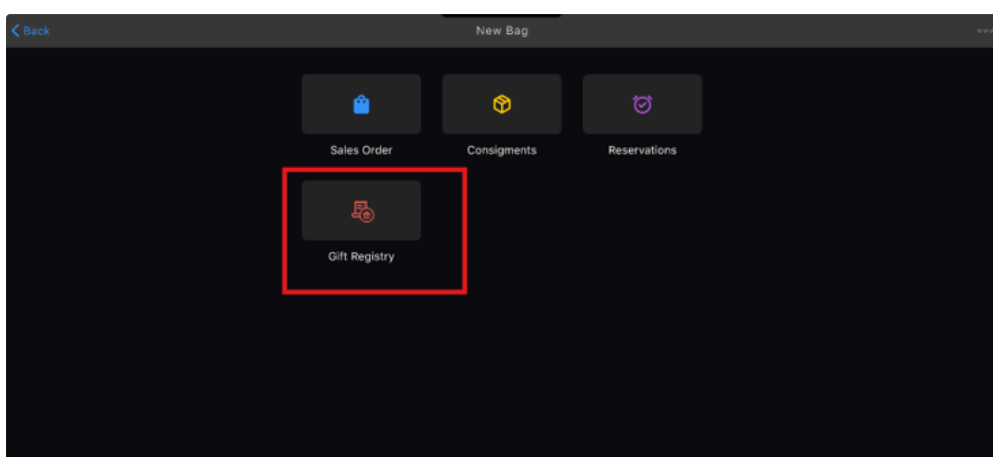
1. Click the burger menu.



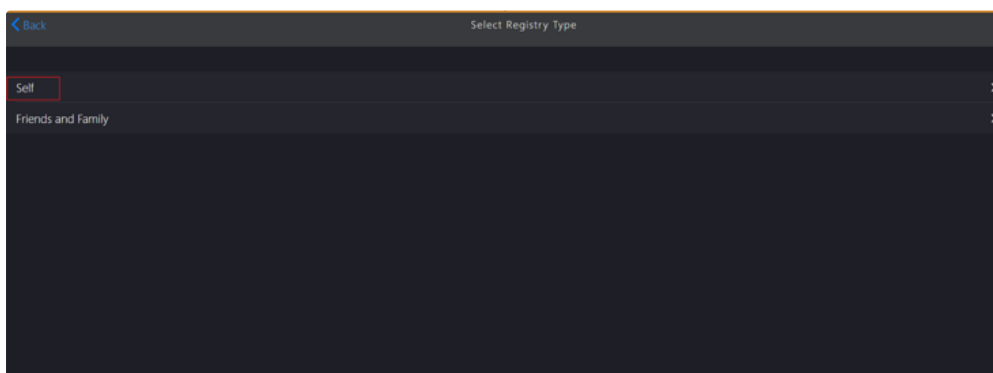
2. Click **New Bag**.



3. Click **Gift Registry**.



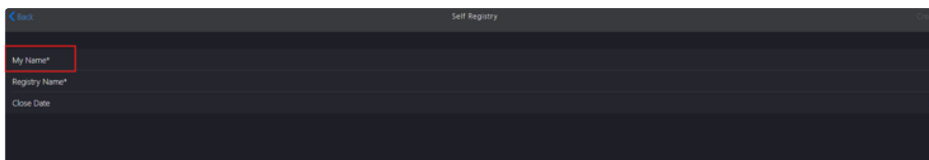
4. Click **Self** in **Select Register Type**.



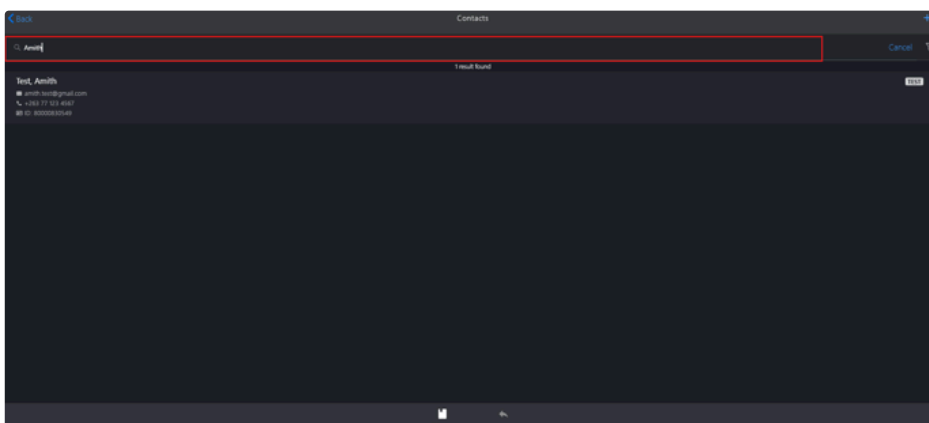
5. Update the following **Self Registry** sections:

- a. If creating gift registry for an existing customer with in an existing gift category, complete the following steps:

i. Click **My Name***.

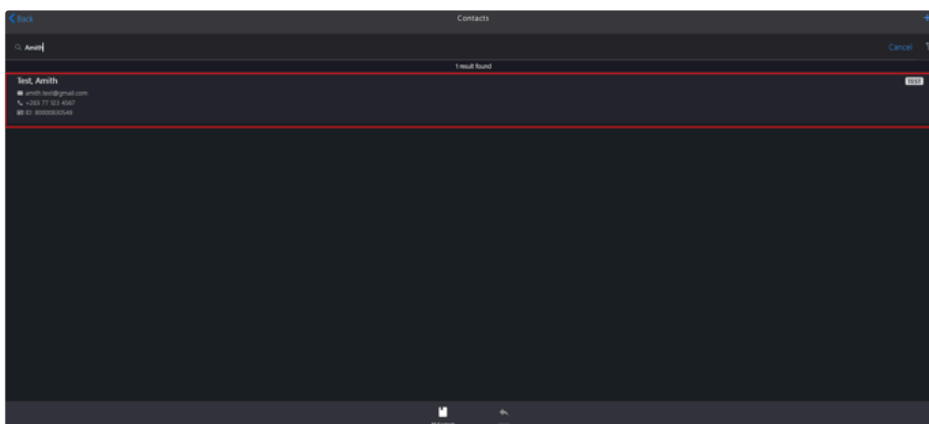


ii. Search for the customer in the **Contacts** search box.

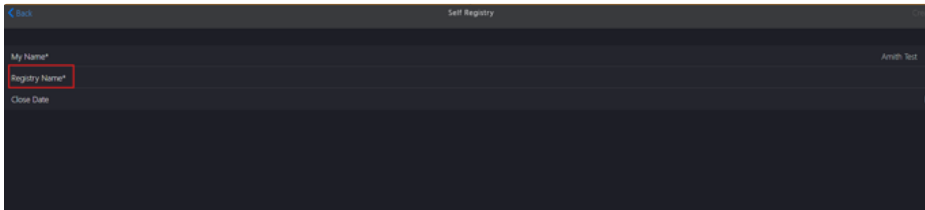


iii. Press the Enter key.

iv. Select the customer from the list.



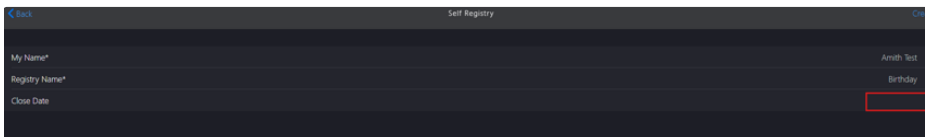
v. Click **Registry Name***.



vi. Select the category from **Select Registry** list.

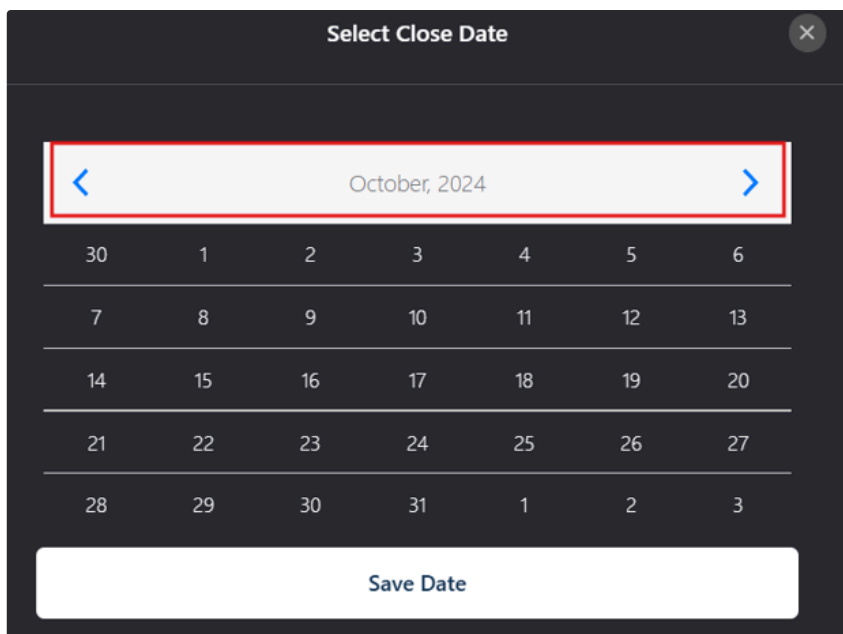


vii. Click calendar icon in **Close Date**.



Note: Setting a gift registry close date is not mandatory. The system by default validates gift registry accounts for one year. If you require a specific closure date, you can set it using the calendar icon.

viii. Click the left arrow to navigate to previous year or the right arrow to proceed to next month.

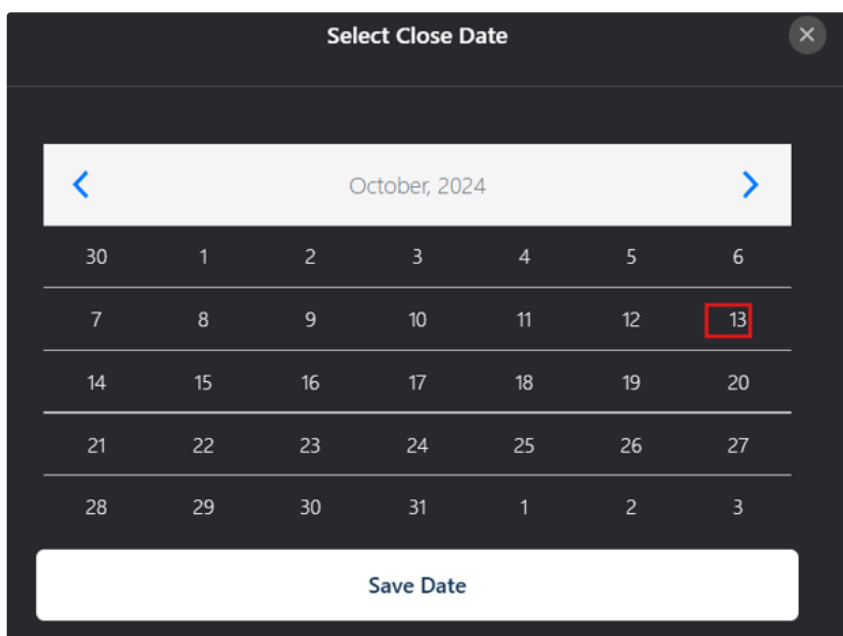


The screenshot shows a dark-themed dialog box titled "Select Close Date" with a close button (X) in the top right corner. At the top, there is a light gray bar containing a left arrow, the text "October, 2024", and a right arrow. Below this is a calendar grid with days of the month. The date 13 is highlighted with a red box. At the bottom of the dialog is a white button labeled "Save Date".

30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Save Date

ix. Select the closure date.

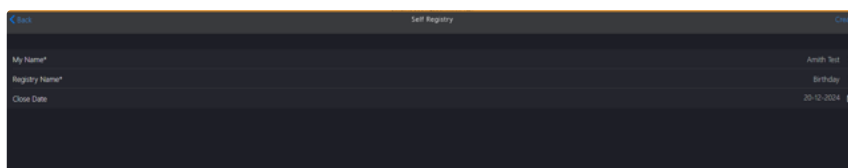
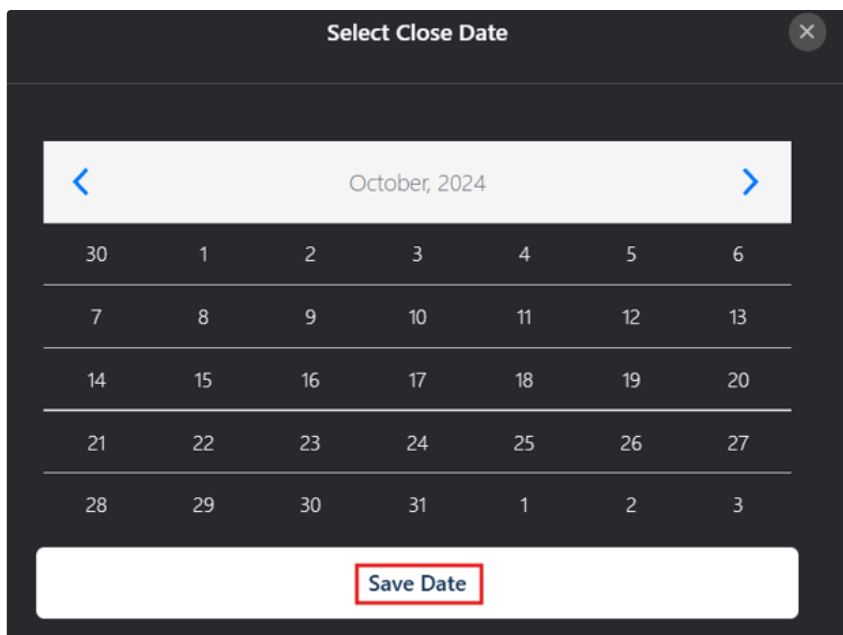


The screenshot shows the same "Select Close Date" dialog box as above. The date 13 is highlighted with a red box. The "Save Date" button is visible at the bottom.

30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

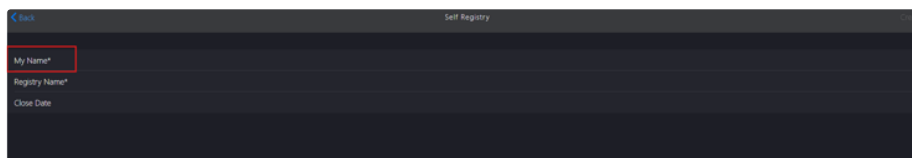
Save Date

x. Click **Save Date**.

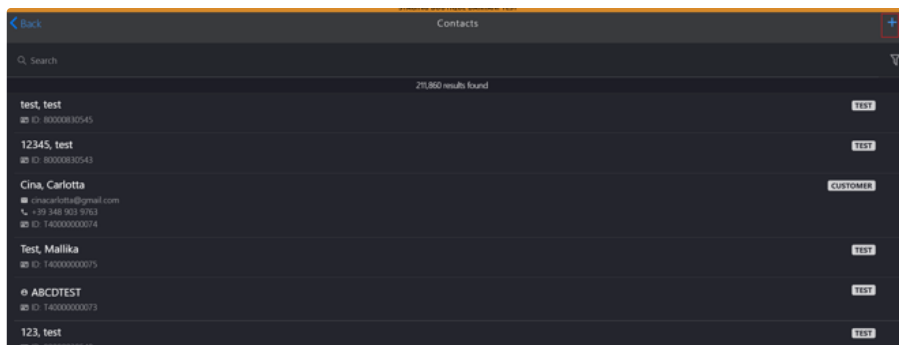


b. If creating gift registry for a new customer in a new gift category, complete the following steps:

i. Click **My Name***.

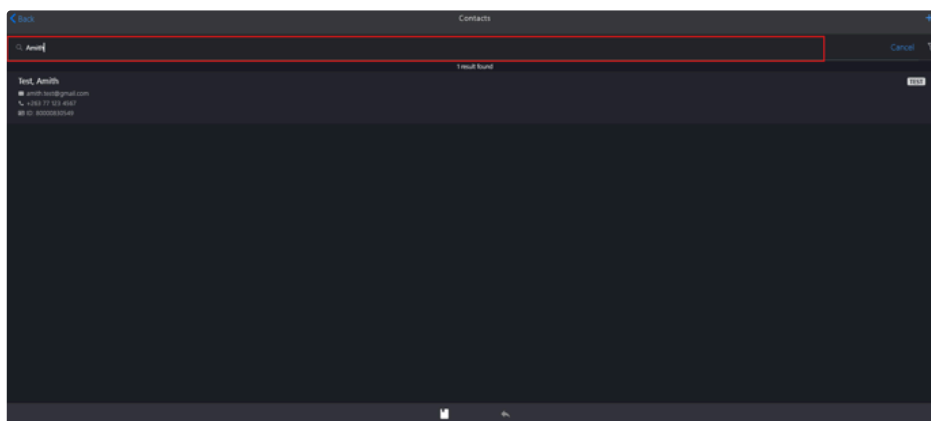


ii. Click Add icon to add the following information:



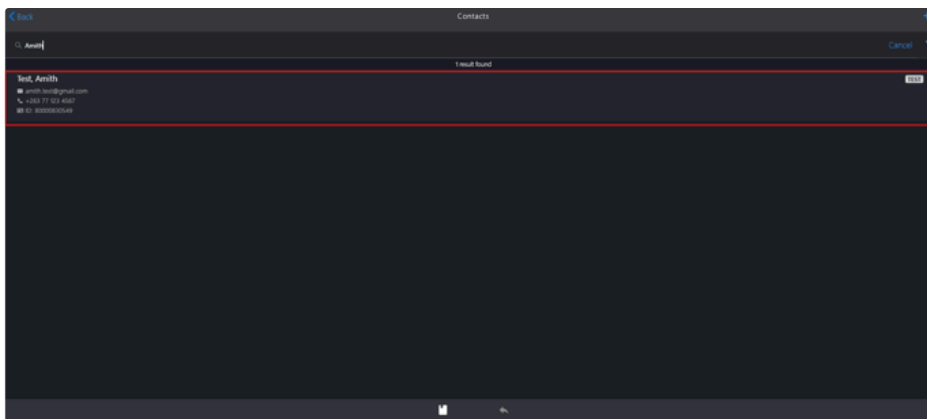
- Create a new customer profile in [New Customer](#) page.
- Add a new address in [Customer Address](#) page.
- Add a new tax profile in [Tax Profile](#) page.
- Configure [Marketing Permissions, Contact Preferences and Customer Signature in Customer Profile](#) page.

iii. Search for the customer in the **Contacts** search box.

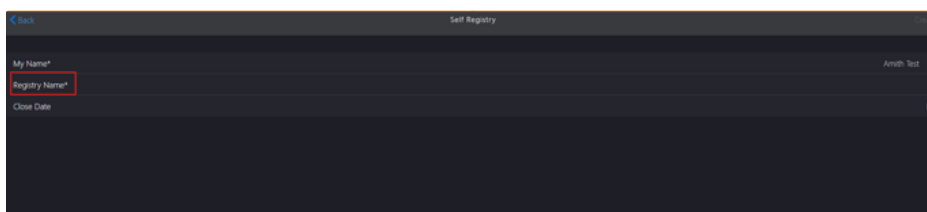


iv. Press the Entry key.

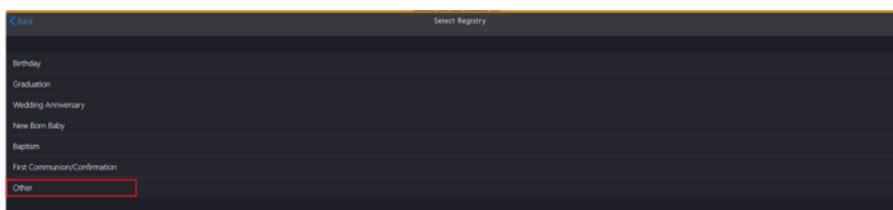
v. Select the customer from the list.



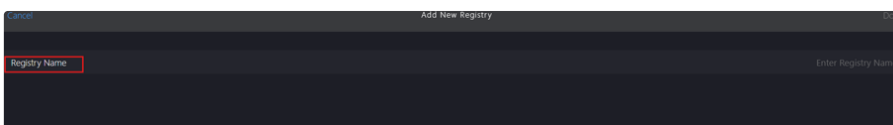
vi. Click **Registry Name***.



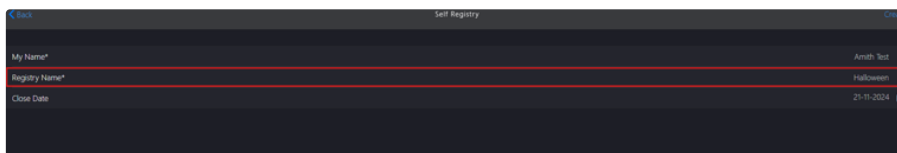
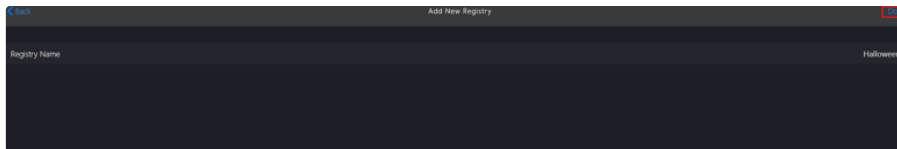
1. Select **Other** from **Select Registry** list.



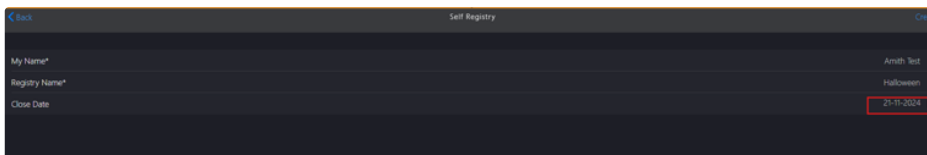
2. Enter the new registry name in **Registry Name** field on **Add New Registry** page.



3. Click **Done** to add the new category to **Registry Name**.

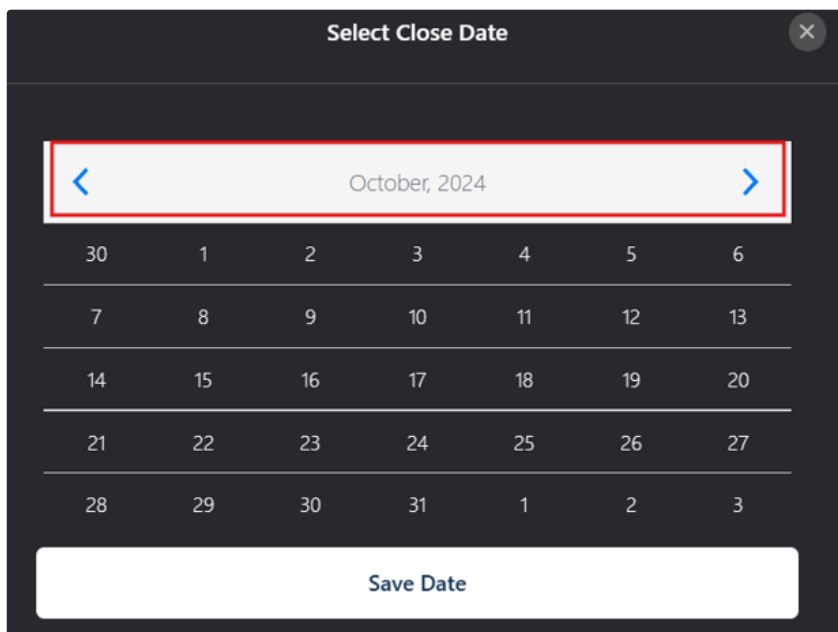


vii. Click the calendar icon in the **Close Date**.

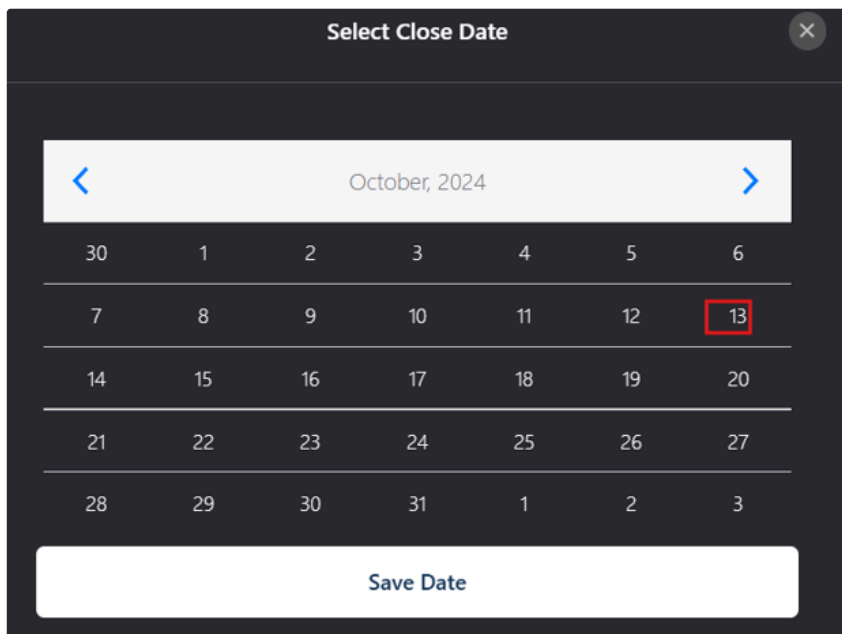


Note: Setting a gift registry close date is not mandatory. The system by default validates gift registry accounts for one year. If you require a specific closure date, you can set it using the calendar icon.

viii. Click the left arrow to navigate to previous month or the right arrow to proceed to next month.



ix. Select the closure date.

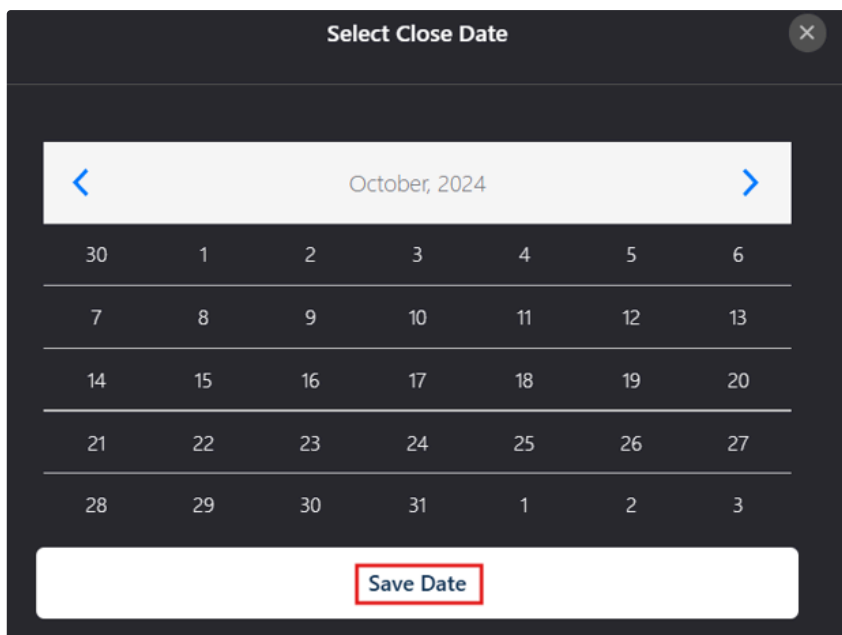


The screenshot shows a 'Select Close Date' dialog box with a dark background. At the top, it says 'Select Close Date' and has a close button (X). Below is a calendar for October, 2024. The dates are arranged in a grid. The date 13 is highlighted with a red box. At the bottom, there is a white button labeled 'Save Date'.

October, 2024						
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Save Date

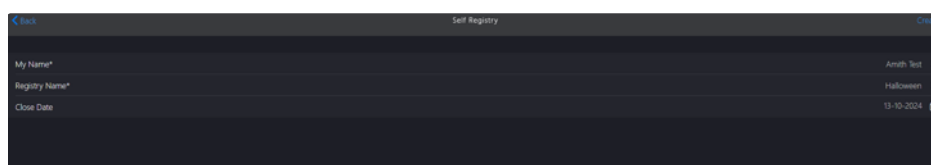
x. Click **Save Date**.



The screenshot shows the same 'Select Close Date' dialog box. The date 13 is no longer highlighted. The 'Save Date' button at the bottom is now highlighted with a red box.

October, 2024						
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

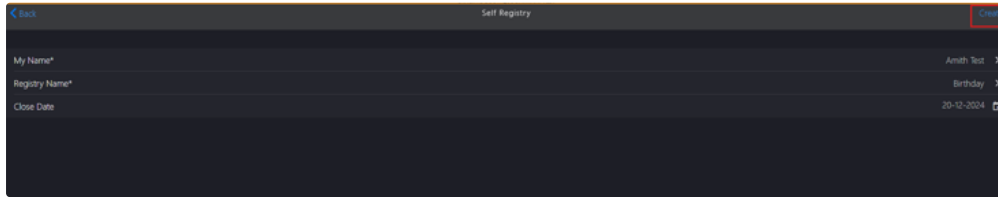
Save Date



The screenshot shows a 'Self Registry' form with a dark background. It has a 'Back' button on the left and a 'Create' button on the right. The form contains three fields: 'My Name*', 'Registry Name*', and 'Close Date'. The 'Close Date' field is populated with '13-10-2024' and has a calendar icon to its right.

Field	Value
My Name*	Arash Test
Registry Name*	Halloween
Close Date	13-10-2024

6. Click **Create** to complete the gift registry account creation.



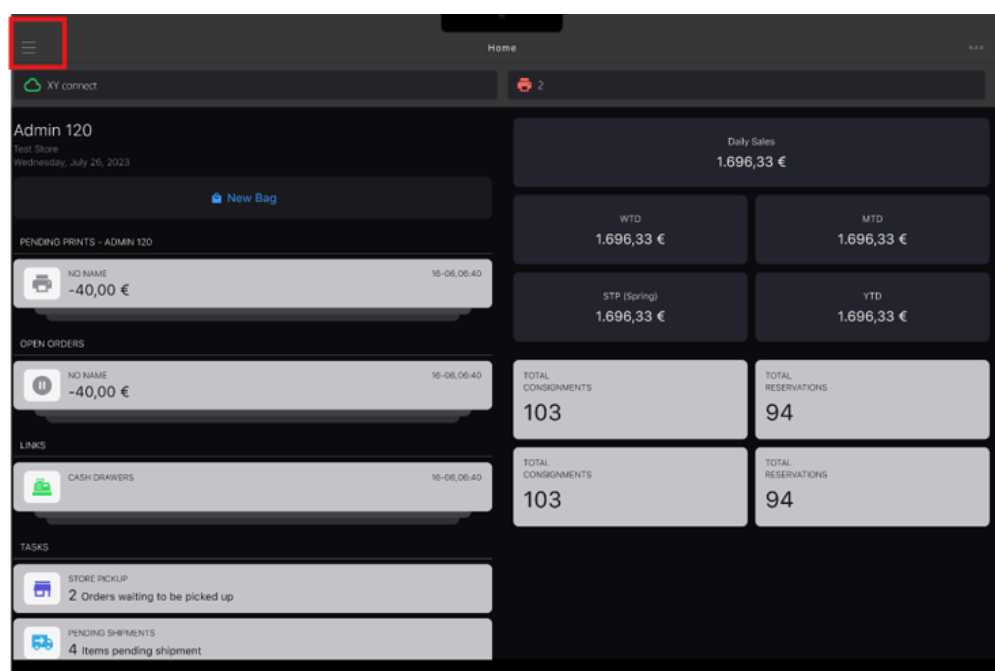
Creating Friends and Family Gift Registry Account

Introduction

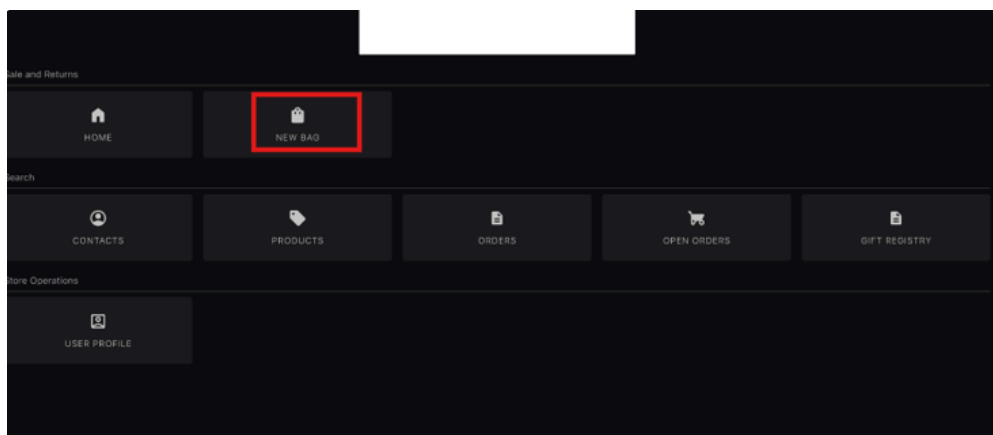
This topic explains the procedure to create a friends and family registry account upon customer requests.

Steps to Create Friends and Family Gift Registry Account

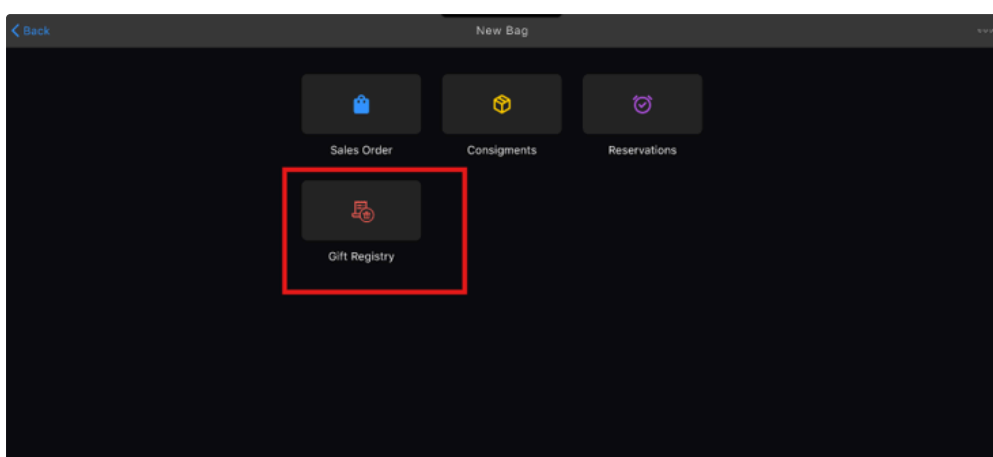
1. Click the burger menu.



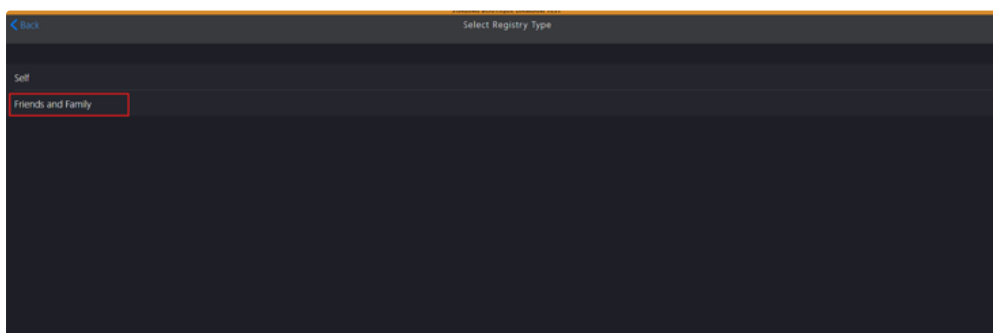
2. Click **New Bag**.



3. Click **Gift Registry**.



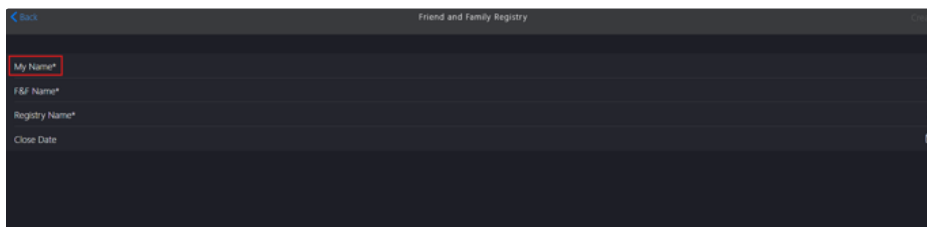
4. Click **Friends and Family**.



5. Update the following **Friends and Family Registry** sections:

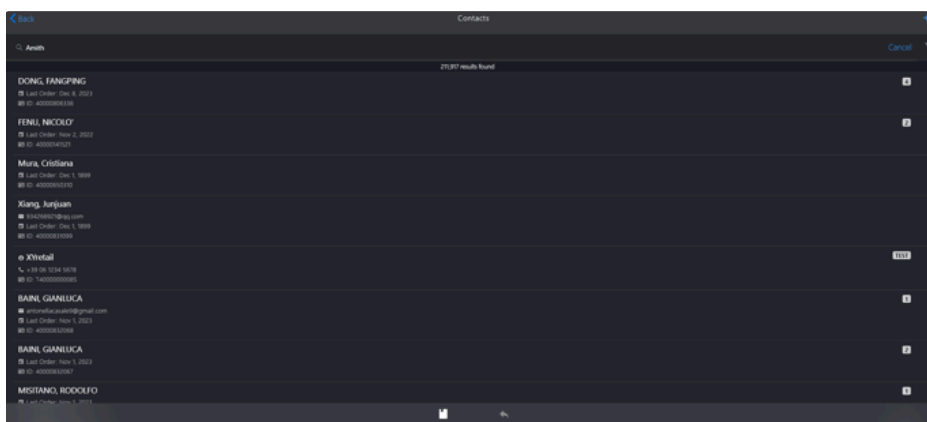
a. If creating a gift registry for a registered member, complete the following steps:

i. Click **My Name***



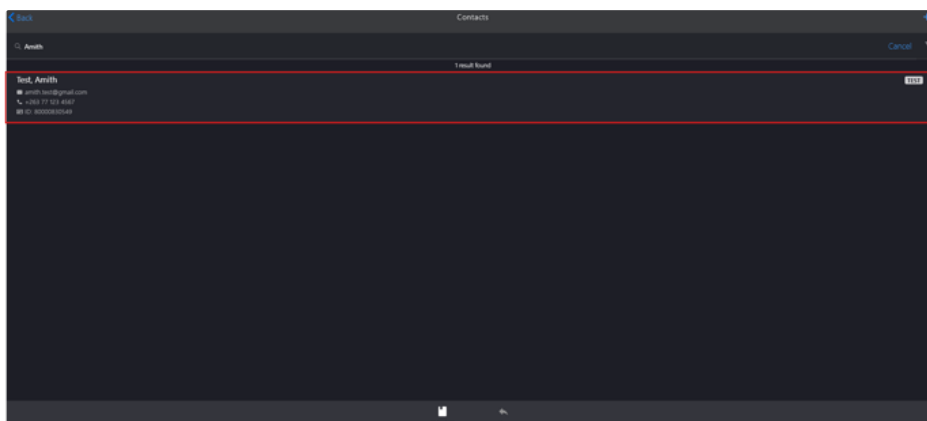
Note: This field captures the name of the person creating the gift registry account.

ii. Search for the customer in the **Contacts** search box.



iii. Press the Enter key.

iv. Select the customer from the list.





Friend and Family Registry

My Name* Ameth Test >

F&F Name* >

Registry Name* >

Close Date >

v. Click **F&F Name***.



Friend and Family Registry

My Name* Ameth Test >

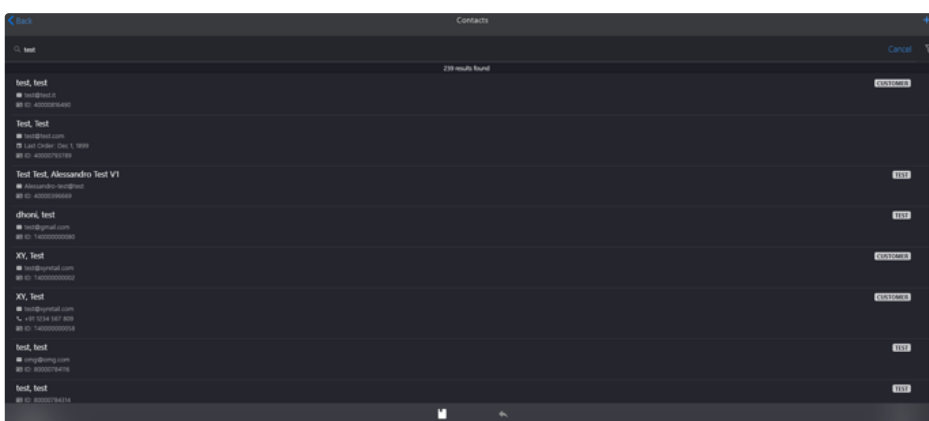
F&F Name* >

Registry Name* >

Close Date >

Note: This field captures the name of the friend or family member for whom the gift account is created.

vi. Search for family or friend's name in the **Contact** search box.



Contacts

test 239 results found Cancel

test, test 1112

Test, test 1112

Test Test, Alessandro Test V1 1112

dhsou, test 1112

XV, Test 1112

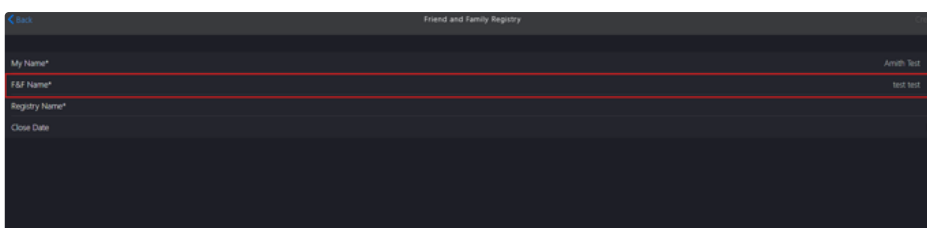
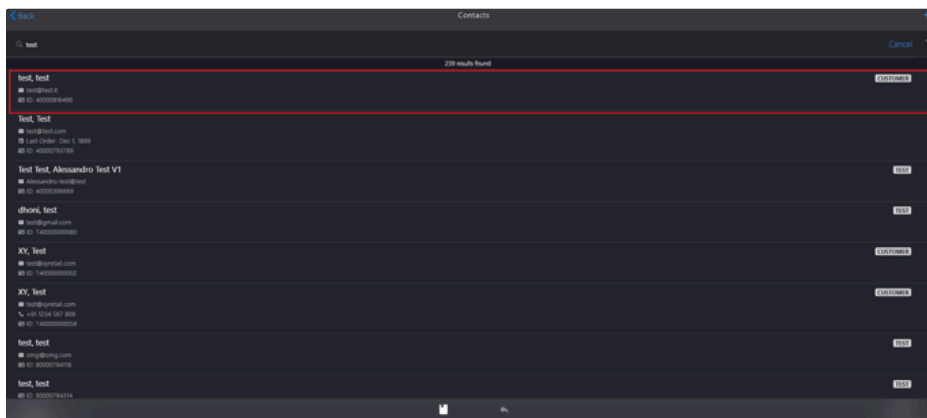
XV, Test 1112

test, test 1112

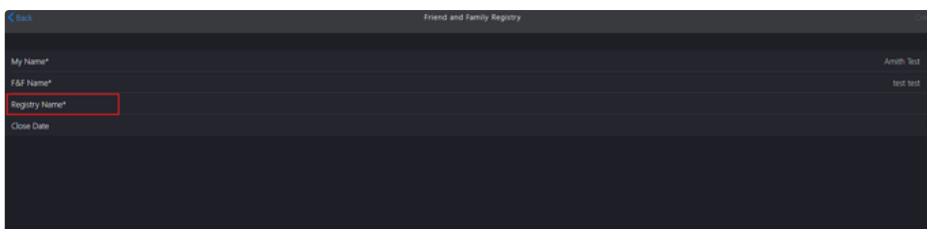
test, test 1112

vii. Press the Enter key.

viii. Select the family or friend's name from the list.



ix. Click **Registry Name***.



x. Select the category from **Select Registry** list.

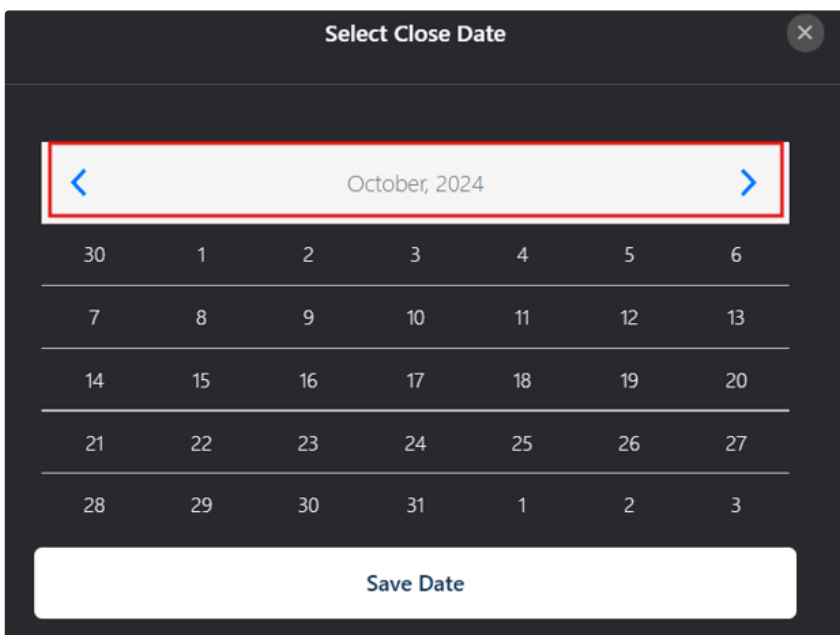


- xi. Click **Close Date** calendar icon.

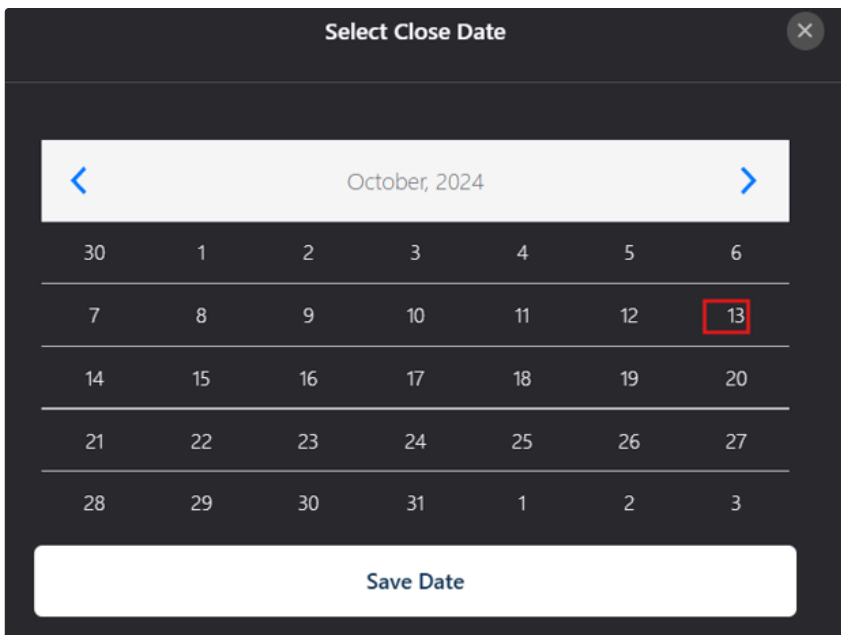


Note: Setting a gift registry close date is not mandatory. The system by default validates gift registry accounts for one year. If you require a specific closure date, you can set it using the calendar icon.

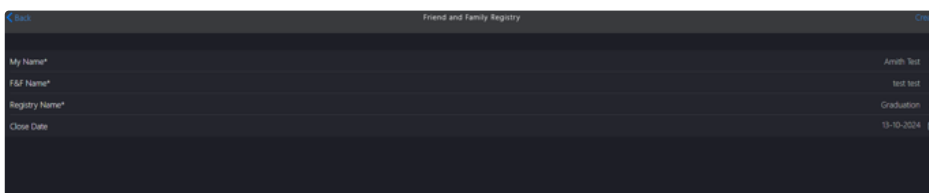
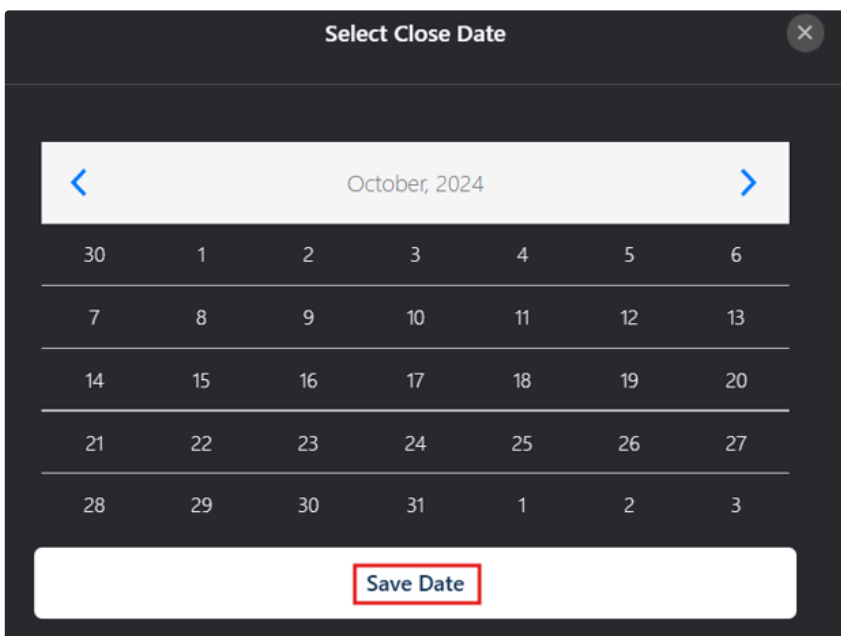
- xii. Click the left arrow to navigate to previous month or the right arrow to proceed to next month.



- xiii. Select the closure date.

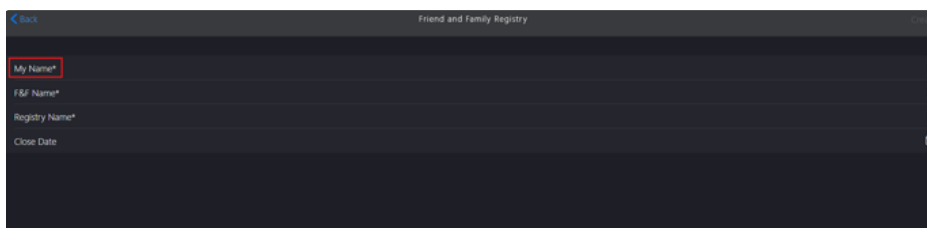


xiv. Click **Save Date** to create the closure date.

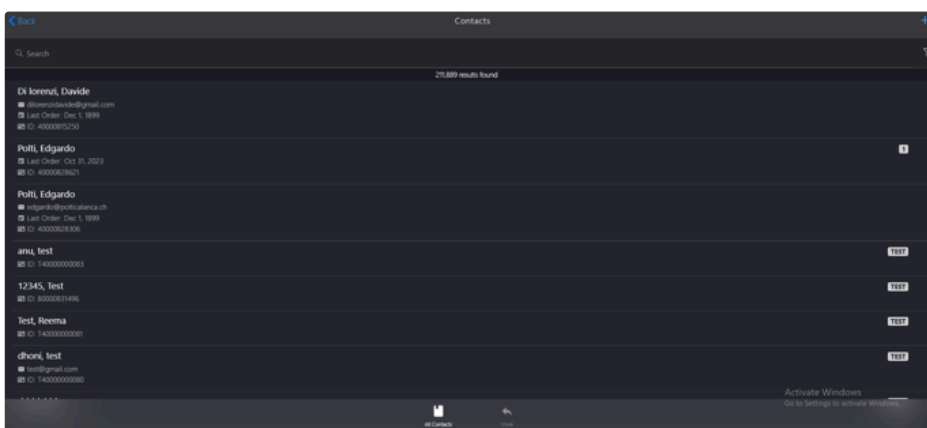


b. If creating a gift registry for a unregistered member in a new gift category, complete the following steps:

i. Click **My Name***.

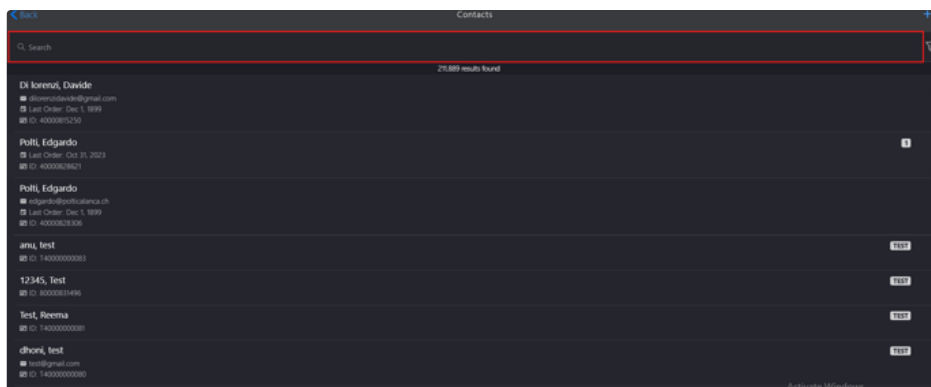


ii. Click Add icon and complete the following steps to register the family or friend.



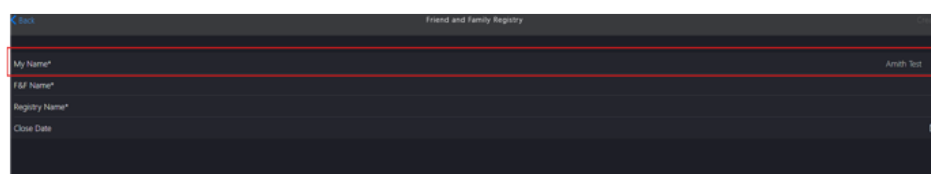
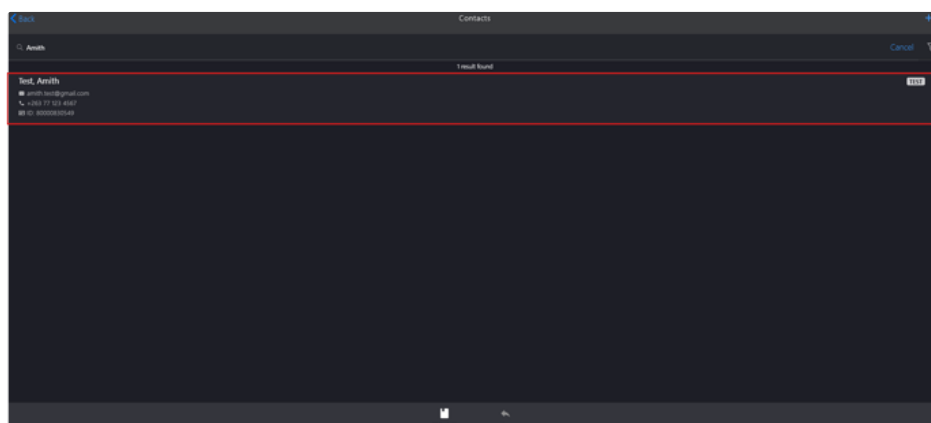
- Create a new customer profile in [New Customer](#) page.
- Add a new address in [Customer Address](#) page.
- Add a new tax profile in [Tax Profile](#) page.
- Configure [Marketing Permissions, Contact Preferences and Customer Signature in Customer Profile](#) page.

iii. Search for the customer in the **Contacts** search box.

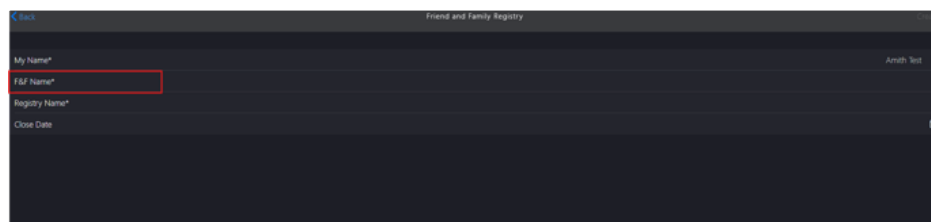


iv. Press the Enter key.

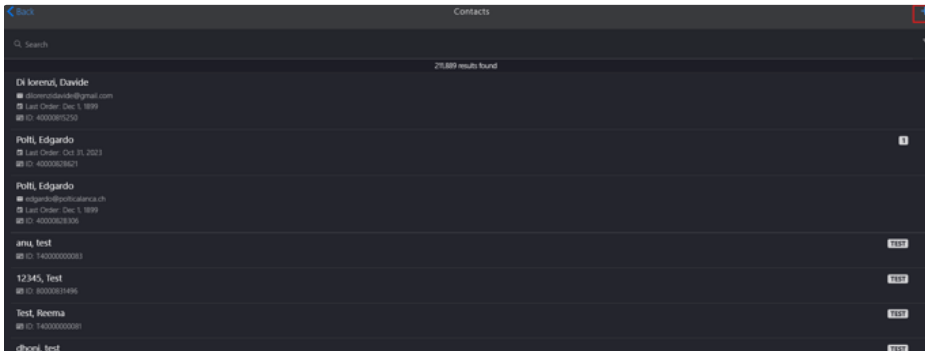
v. Select the customer from the list.



vi. Click **F&F Name***.

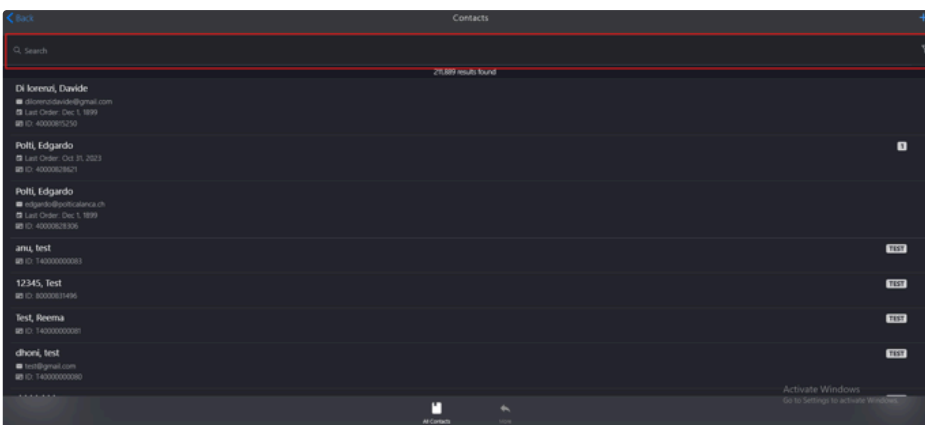


vii. Click Add icon and complete the following steps to register the family or friend.



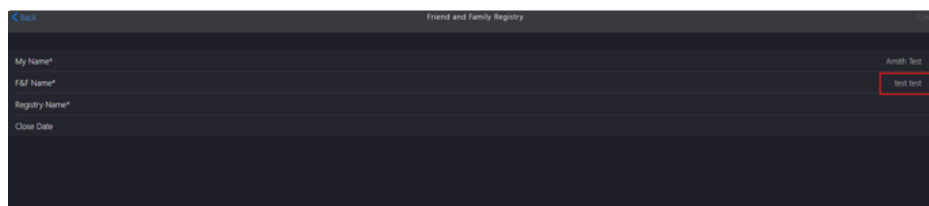
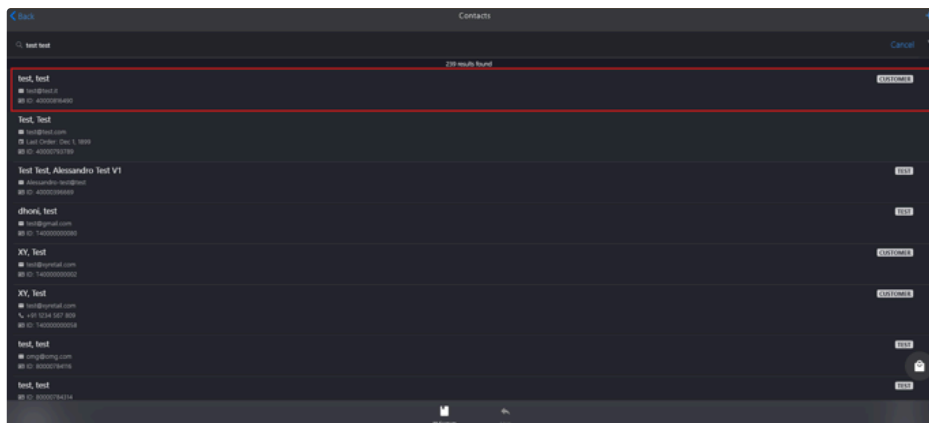
- Create a new customer profile in [New Customer](#) page.
- Add a new address in [Customer Address](#) page.
- Add a new tax profile in [Tax Profile](#) page.
- Configure [Marketing Permissions, Contact Preferences and Customer Signature in Customer Profile](#) page.

viii. Search for family or friend's name in the **Contact** search box.

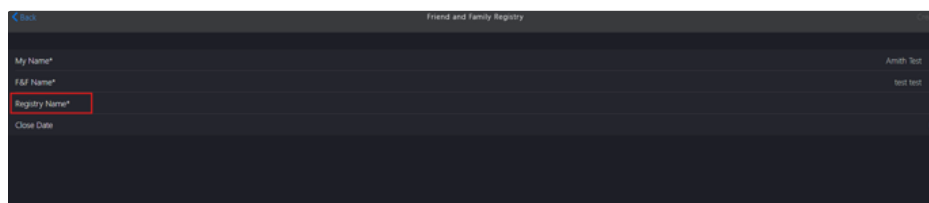


ix. Press the Enter key.

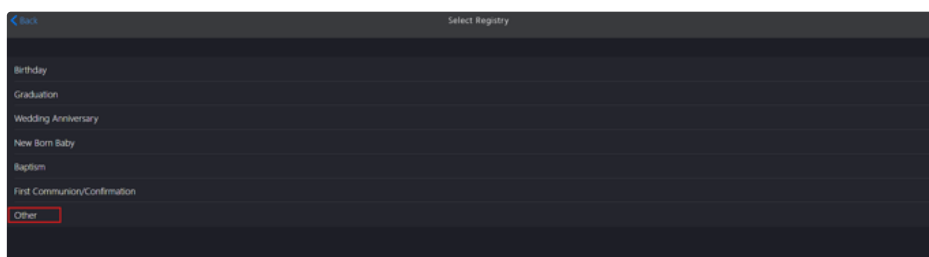
x. Select the family or friend's name from the list.



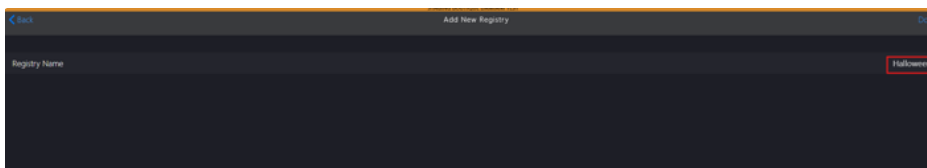
xi. Click **Registry Name***.



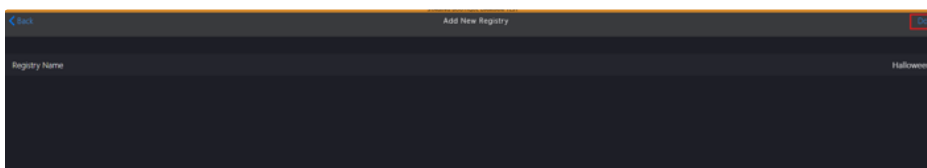
1. Click **Other** from **Select Registry** list.



2. Enter the new registry name in **Registry Name** field on **Add New Registry** page.



3. Click **Done** to add the category to **Registry Name***.

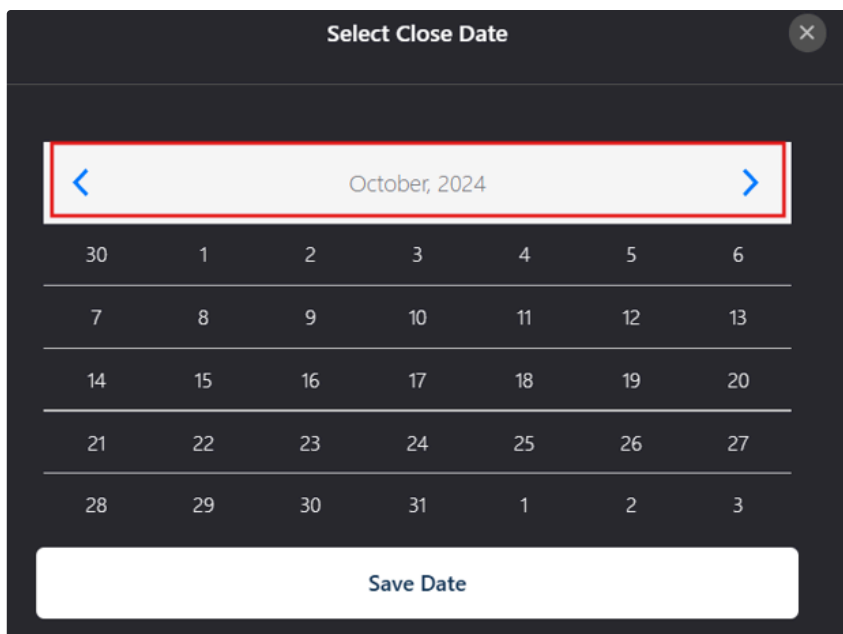


xii. Click **Close Date** calendar icon.



Note: Setting a gift registry close date is not mandatory. The system by default validates gift registry accounts for one year. If you require a specific closure date, you can set it using the calendar icon.

xiii. Click the left arrow to navigate to previous month or the right arrow to proceed to next month.

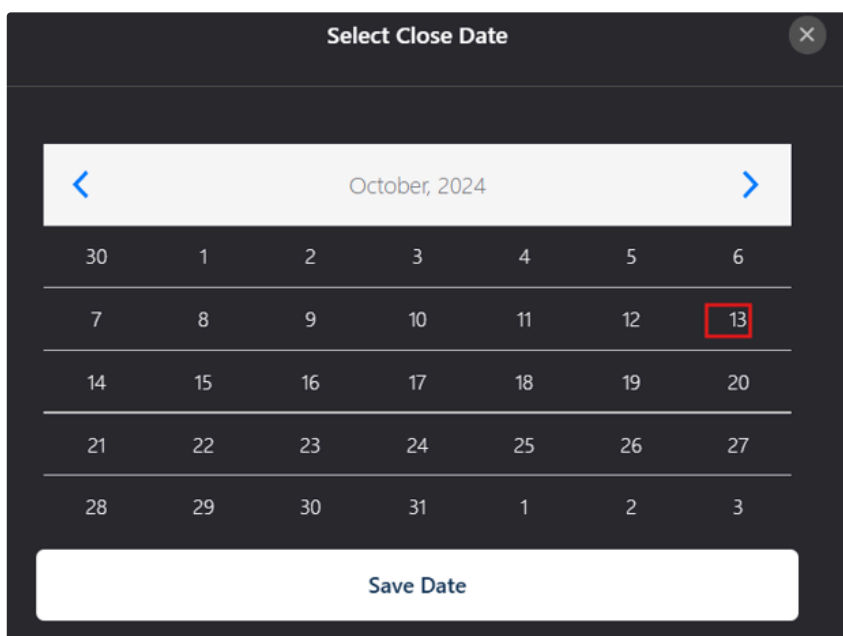


The screenshot shows a dark-themed dialog box titled "Select Close Date" with a close button (X) in the top right corner. At the top, there is a header bar with a left arrow, the text "October, 2024", and a right arrow. Below this is a calendar grid with days of the month. The date 13 is highlighted with a red box. At the bottom of the dialog is a white button labeled "Save Date".

30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Save Date

xiv. Select the closure date.

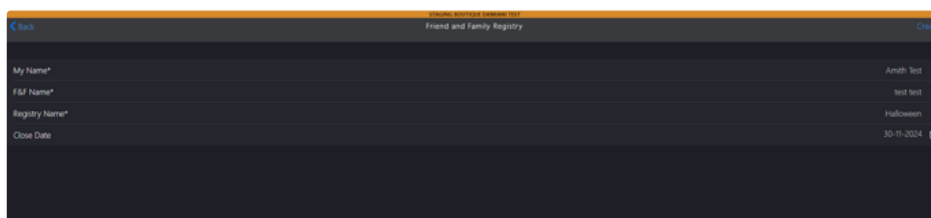
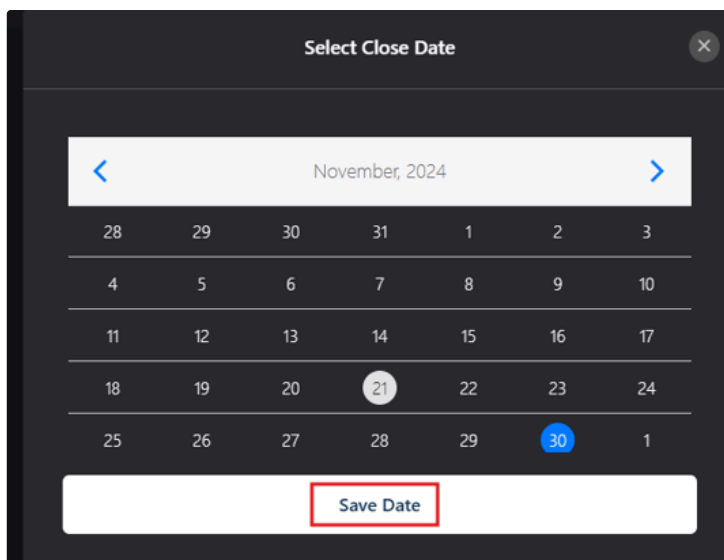


The screenshot shows a dark-themed dialog box titled "Select Close Date" with a close button (X) in the top right corner. At the top, there is a header bar with a left arrow, the text "October, 2024", and a right arrow. Below this is a calendar grid with days of the month. The date 13 is highlighted with a red box. At the bottom of the dialog is a white button labeled "Save Date".

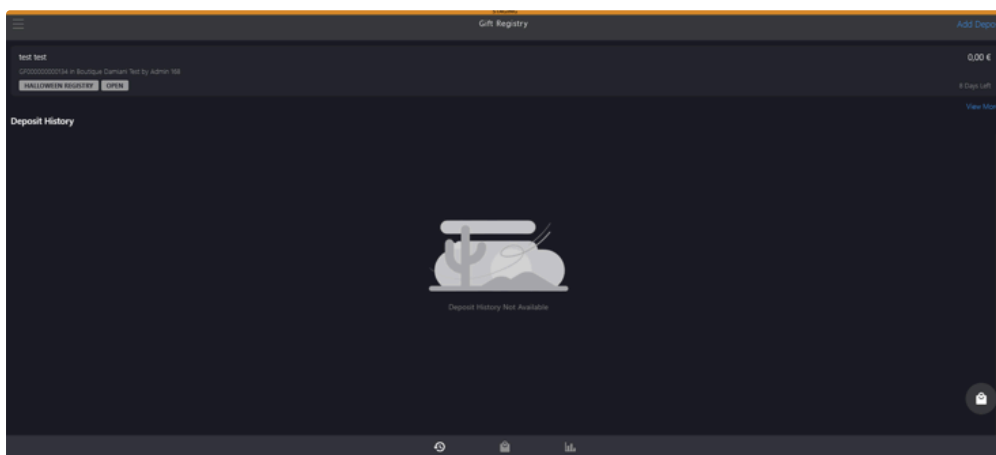
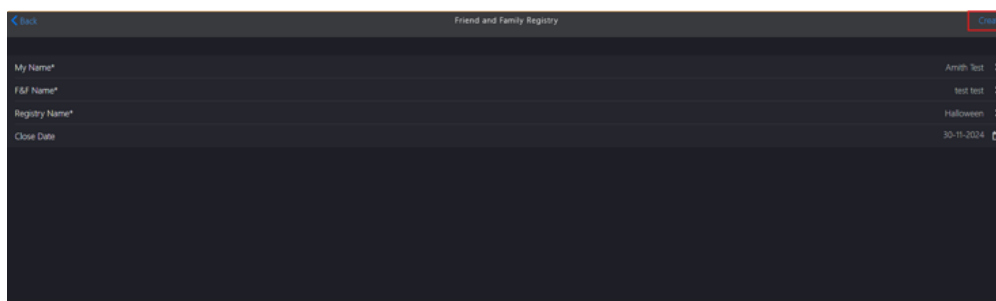
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Save Date

xv. Click **Save Date**.



6. Click **Create** to complete the gift registry account creation.



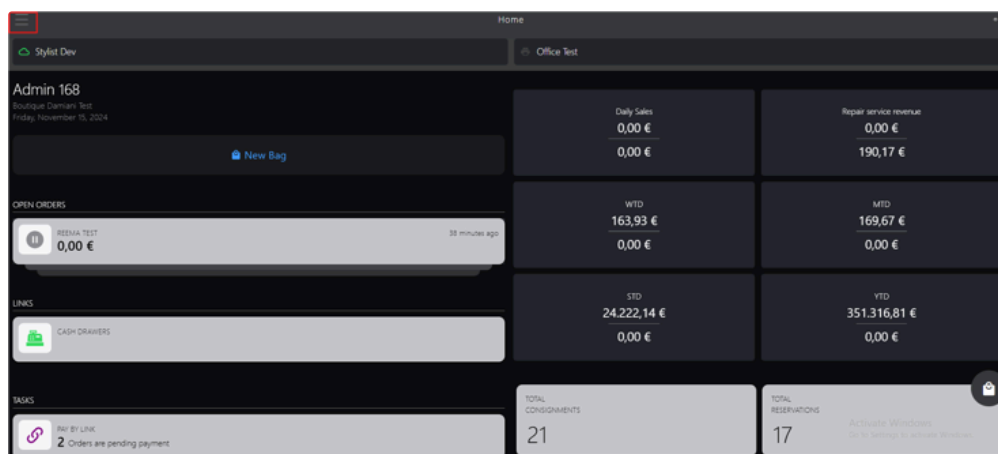
Verifying New Gift Registry Account

Introduction

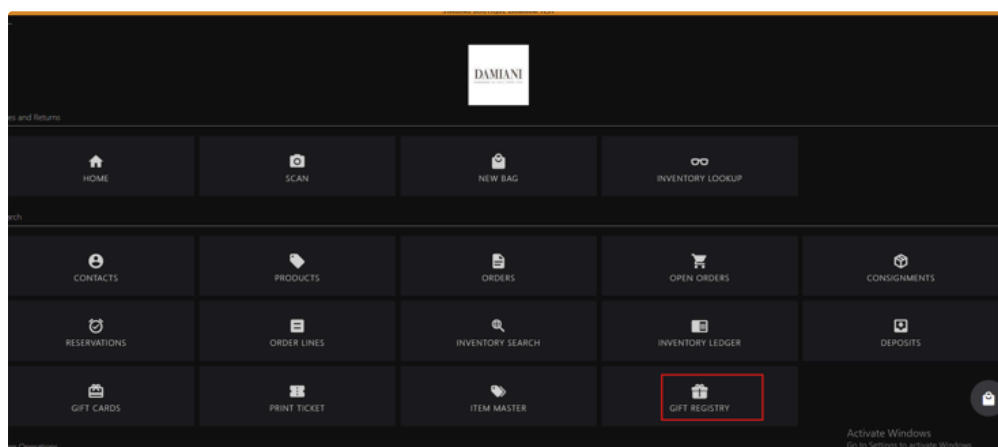
This topic explains how to verify newly created gift registry account.

Steps to Verify New Gift Register Account

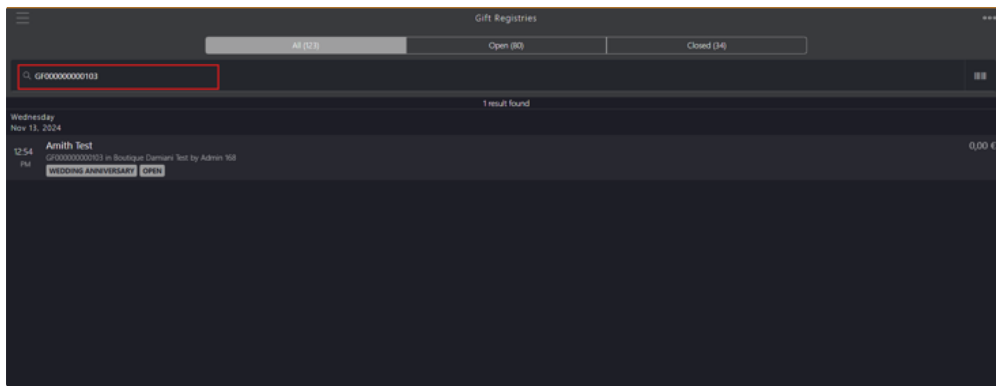
1. Click the burger menu.



2. Click **GIFT REGISTRY**.

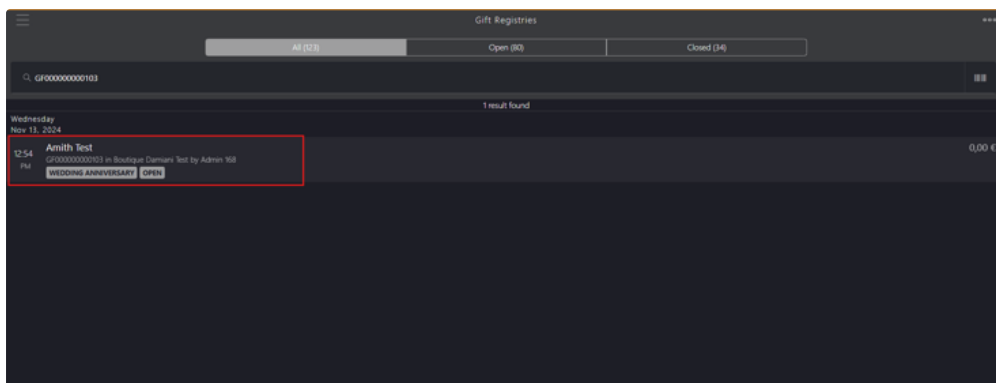


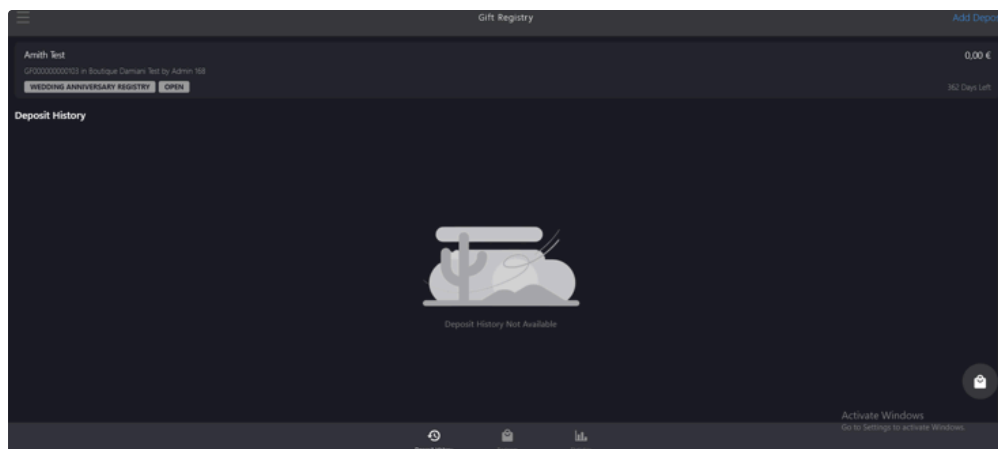
3. Search for the gift registry using account holder's name, gift registry id or gift registry tag in **Gift Registries**.



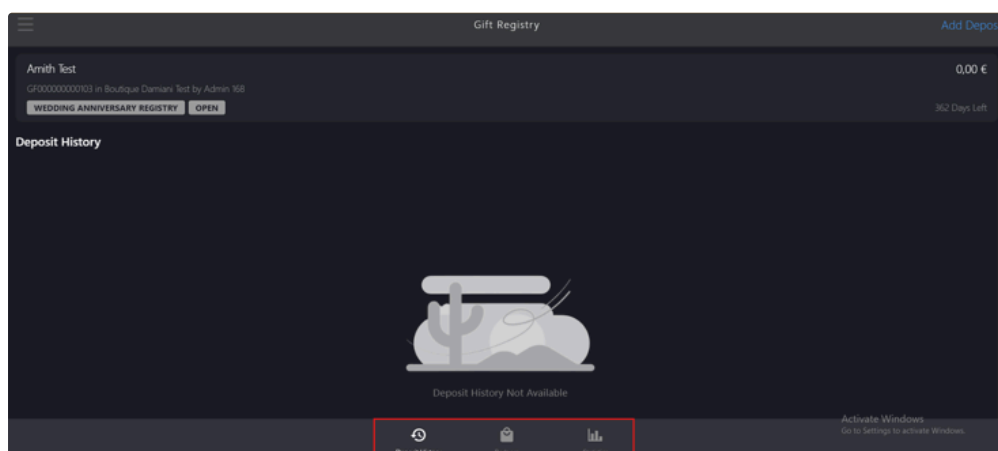
- Account holder's name: The individual's name for whom the account is created, for example, Amith Test.
- Gift registry id: A unique number allocated to gift registry account upon creation, for example, GF00000000103.
- Gift registry tag: The registry category for which the gift registry account is created, for example, WEDDING ANNIVERSARY.
- Status: **Gift Registries** page appears with a status bar that includes the following tabs:
 - **ALL**: Displays all the accounts in open and closed status.
 - **Open**: Displays only the accounts in open status.
 - **Closed**: Displays only the accounts in closed status.

4. Select the customer's name from the search result to display the gift registry account.





5. Verify the options in **Gift Registry** bottom bar menu:



- **Deposit History:** Displays the deposits received to the account.
- **Redeem:** Allows customer to purchase the items.
- **Statistics:** Displays the following total amount status:
 - **Amount Collected:** Displays the total amount of funds collected in the gift registry account.
 - **Amount Redeemed:** Displays the total amount of funds redeemed from the gift registry account.
 - **Amount Available:** Displays the remaining funds available in the gift registry account after an item purchase.

Arith test 0,00 €

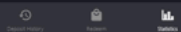
02000000000000000000 in Boutique Demos Test by Admin 168 362 Days Left

[WEDDING ANNIVERSARY REGISTER](#) [OPEN](#)

Statistics

Amount Collected	0,00 €
Amount Redeemed	0,00 €
Amount Available	0,00 €

Activate Windows
Go to Settings to activate Windows.



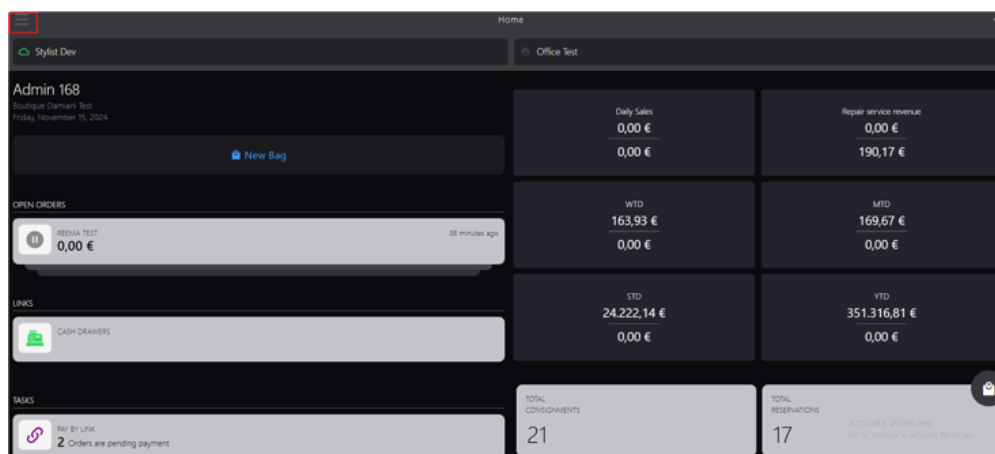
Adding Deposit to Gift Registry Account

Introduction

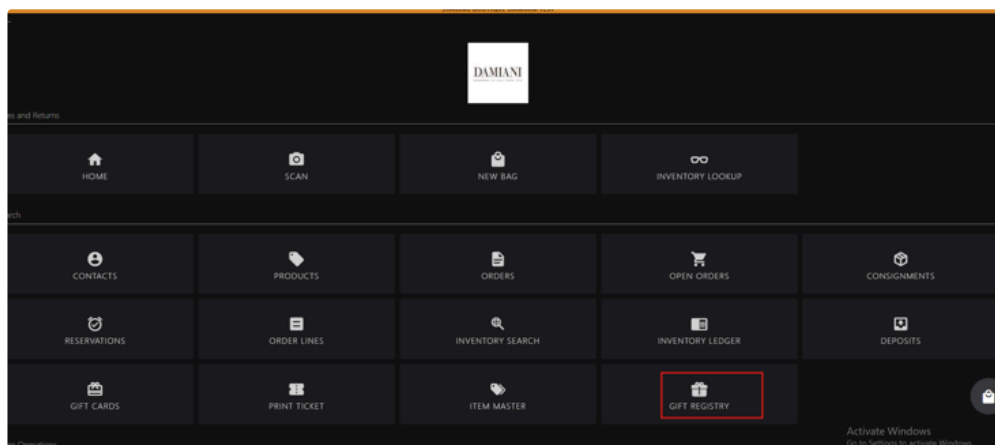
This topic explains the procedure to add deposit to the gift registry account.

Steps to Add Deposit to Gift Registry Account

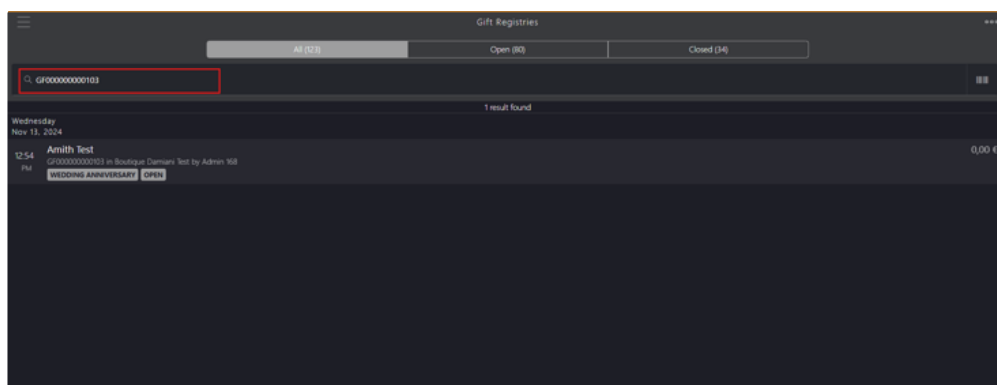
1. Click the burger menu.



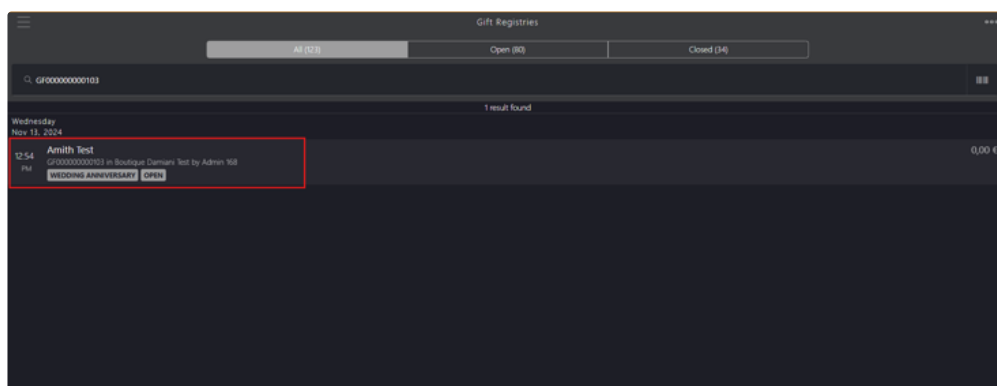
2. Click **GIFT REGISTRY**.



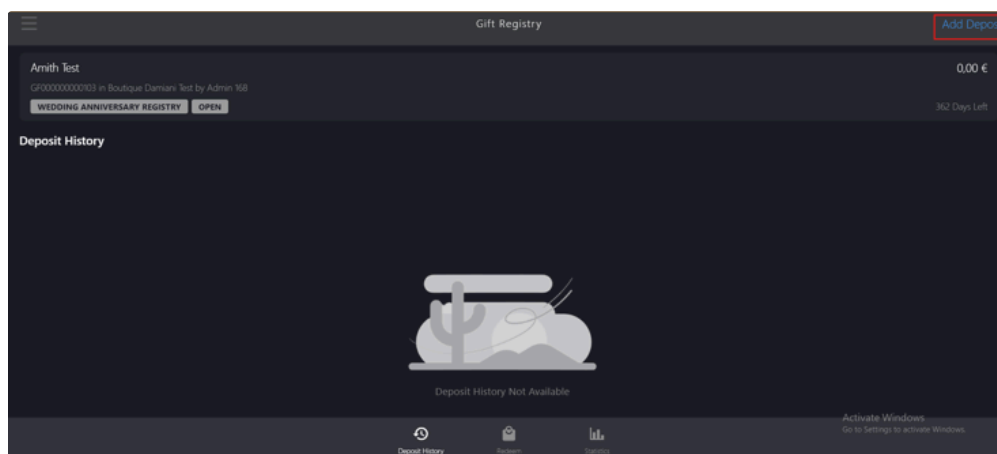
3. Search for the gift registry using account holder's name, gift registry id or gift registry tag in **Gift Registries** search box.



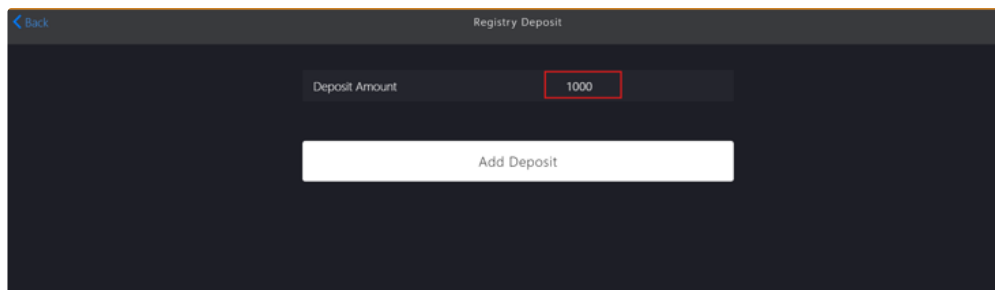
4. Select the name from the search result to display the gift registry account.



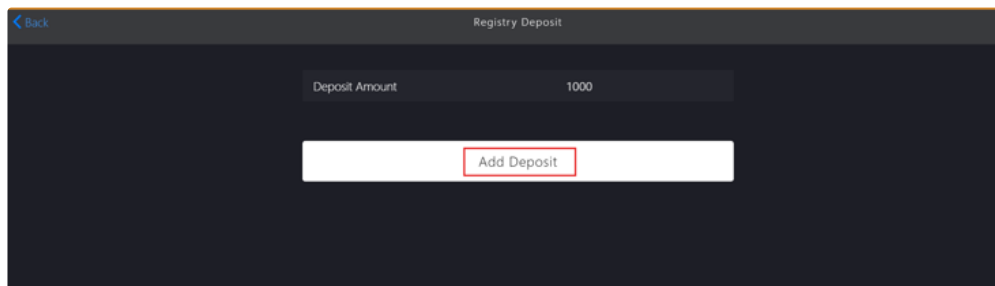
5. Click **Add Deposit** on the **Gift Registry** page.



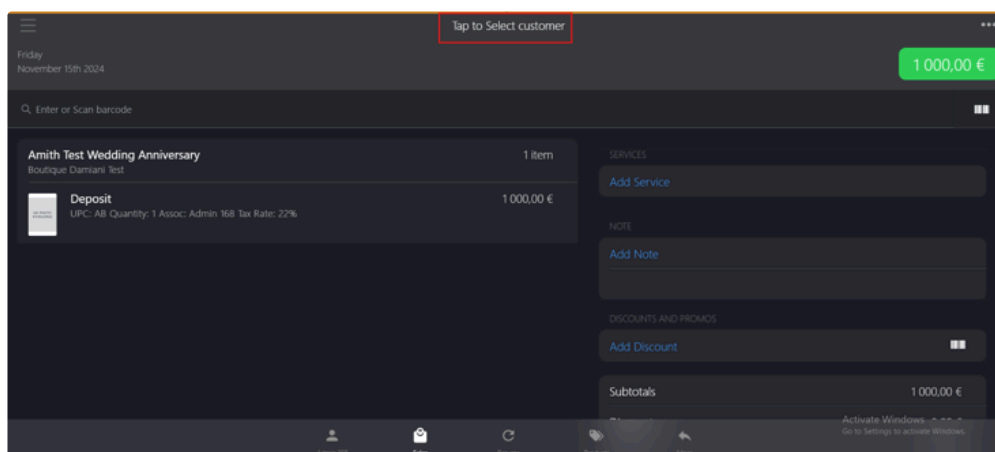
6. Enter the amount in **Deposit Amount** field on **Registry Deposit** page.



7. Click **Add Deposit**.



8. Click **Tap to Select Customer**.



Note: Adds the individual who is contributing to the gift registry deposit account.

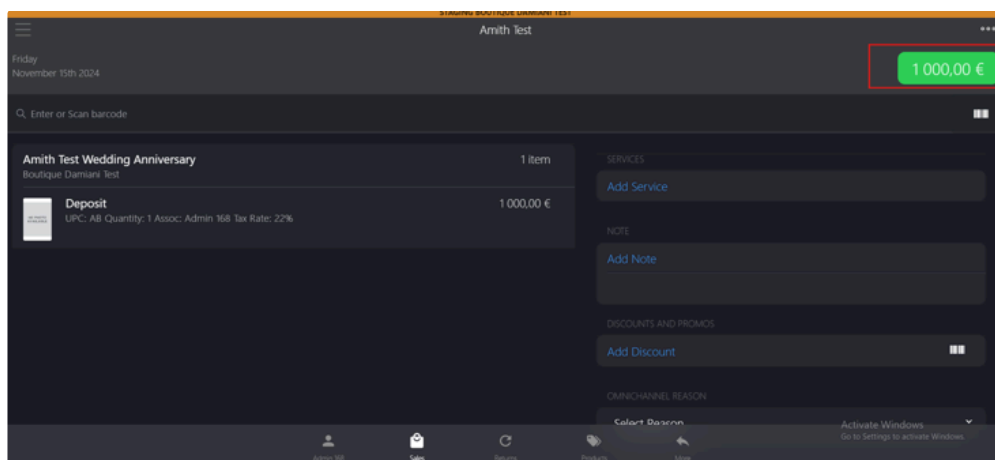
9. Search by name in **Contacts** search box.



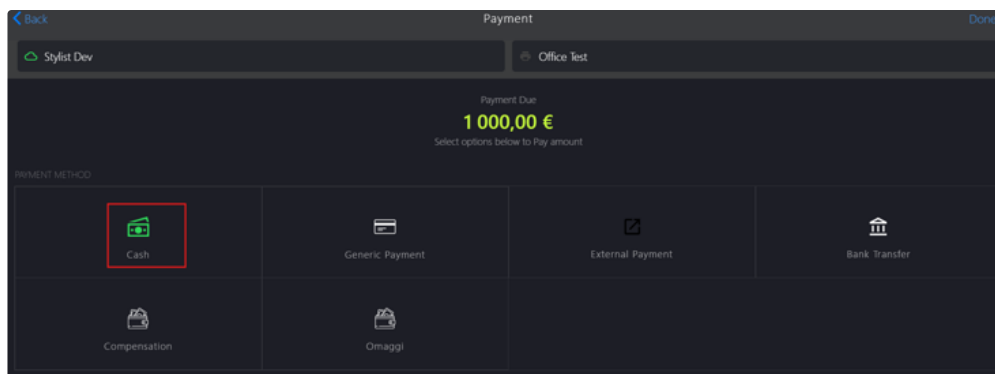
10. Select the name from the search result.



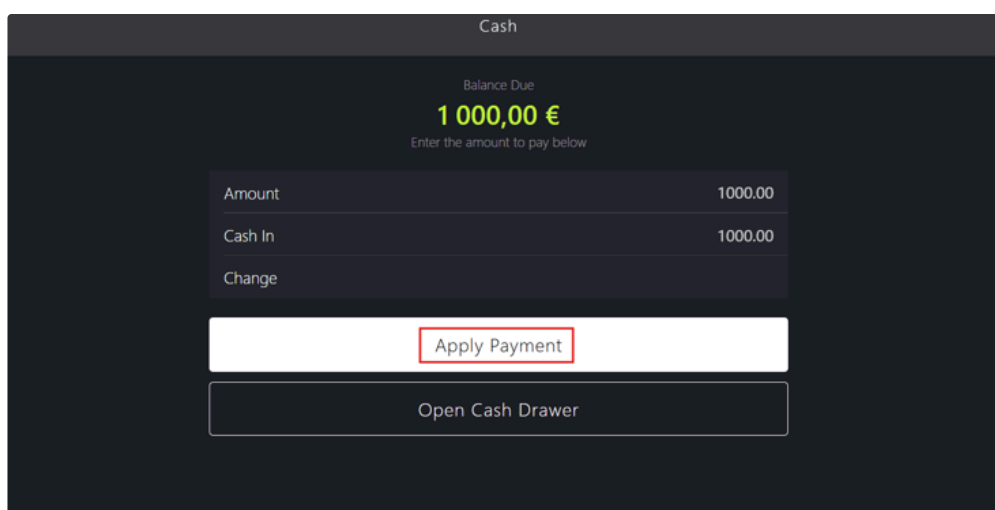
11. Click the green button in the upper-right corner.



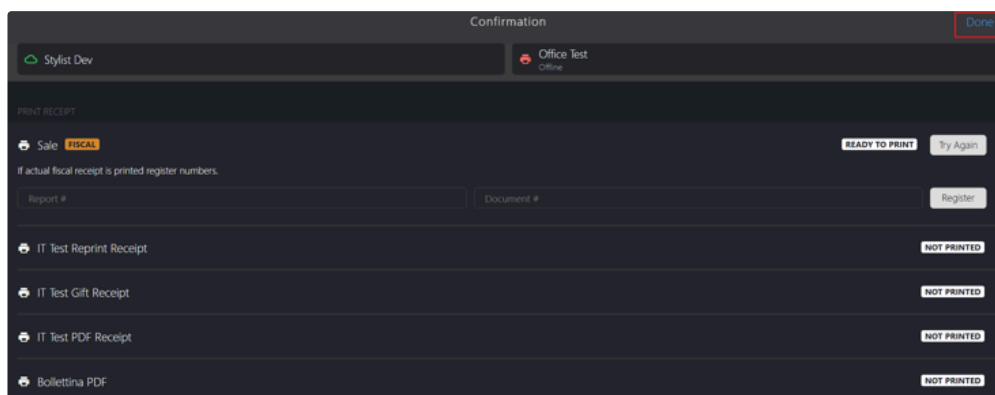
12. Select the **PAYMENT METHOD** on the **Payment** page, for example, **Cash** option.



13. Click **Apply Payment** on the **Cash** page.



14. Click **Done** to complete the deposit transaction on the **Confirmation** page.



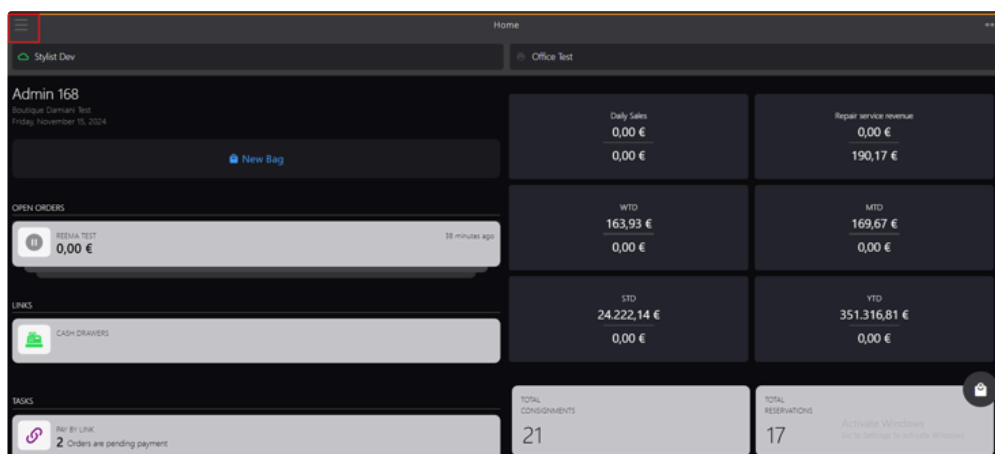
Redeeming Deposit from Gift Registry Account

Introduction

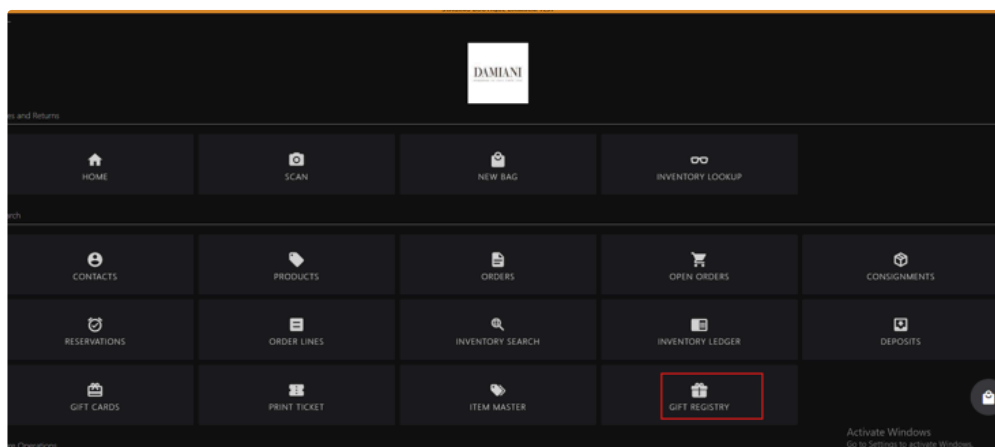
This topic explains the procedure of redeeming deposits from the gift registry account.

Steps to Redeem Deposit from Gift Registry

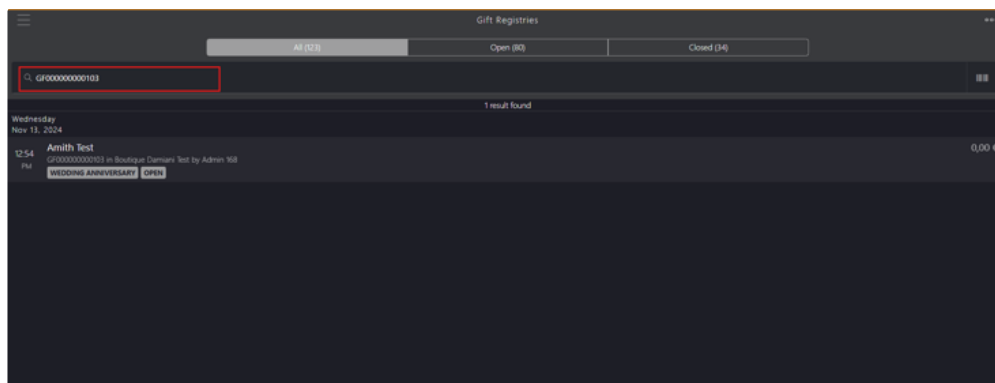
1. Click the burger menu.



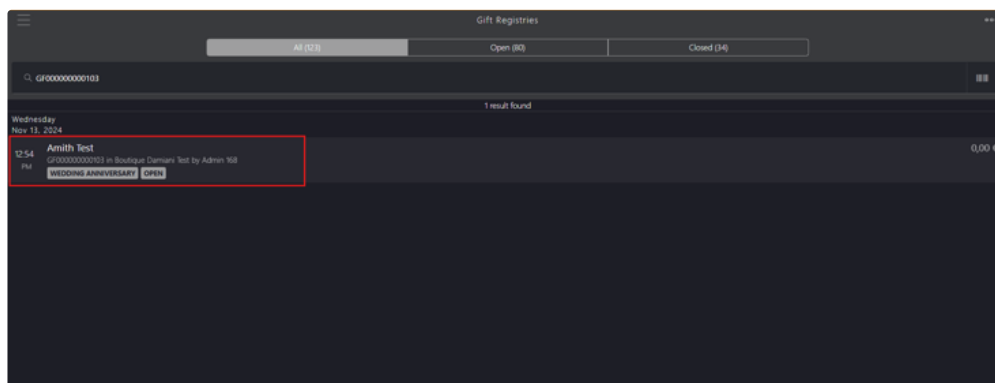
2. Click **GIFT REGISTRY**.



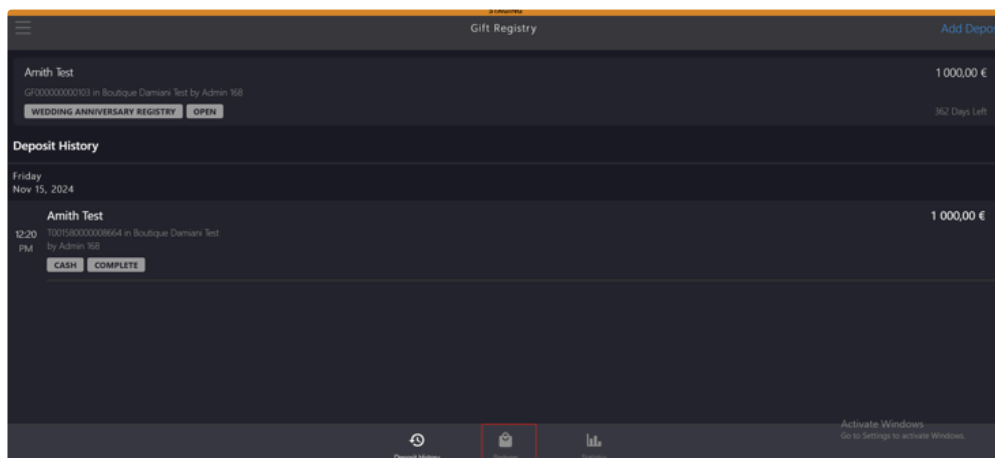
3. Search for the gift registry using account holder's name, gift registry id or gift registry tag in **Gift Registries** search box.



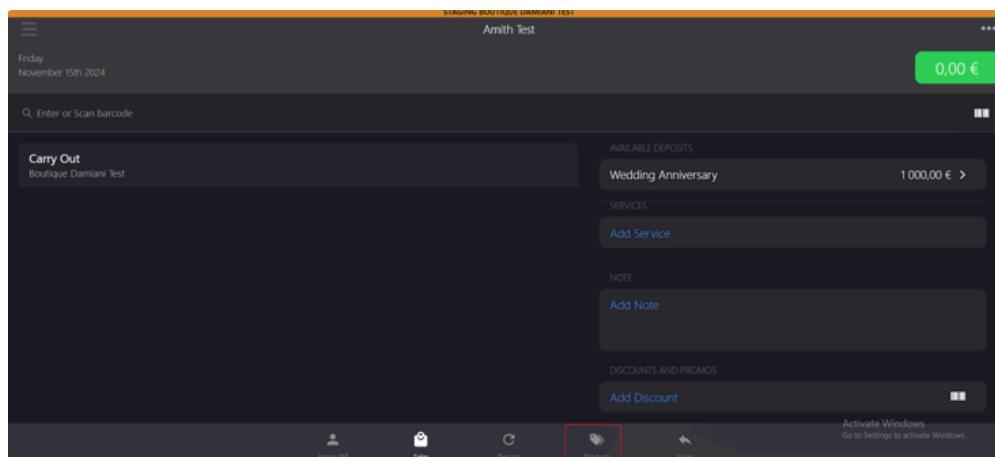
4. Select the name from the search result.



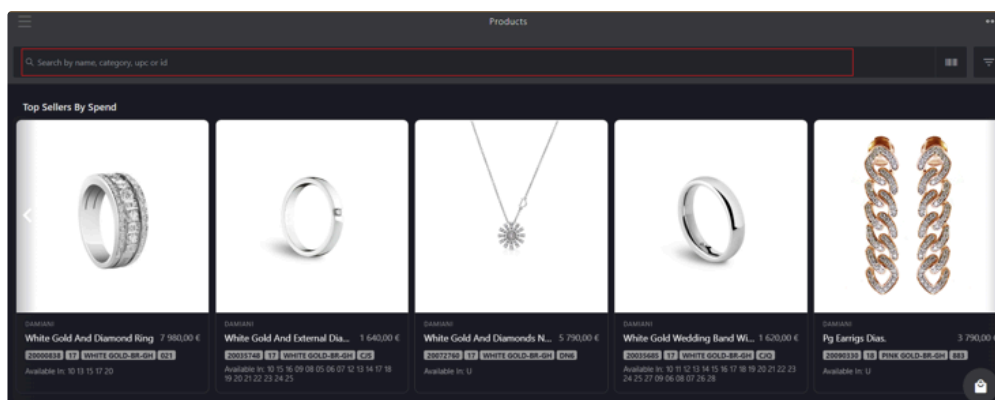
5. Click **Redeem** in the bottom bar menu.



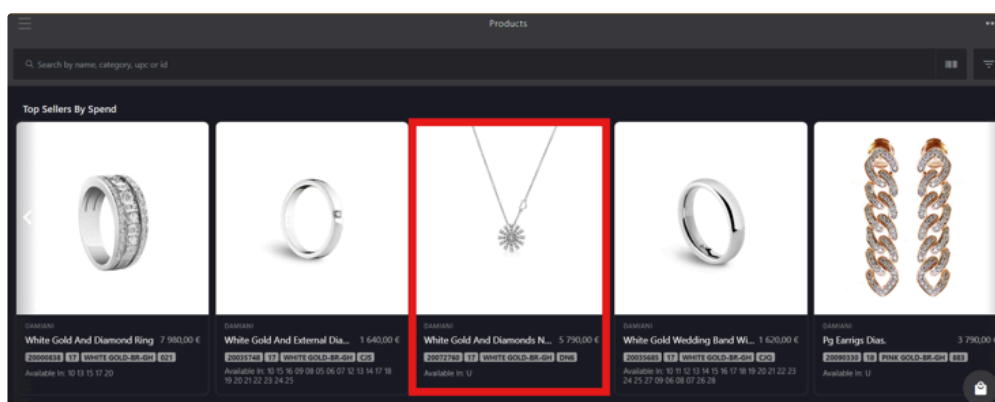
6. Click **Products** in the bottom bar menu.



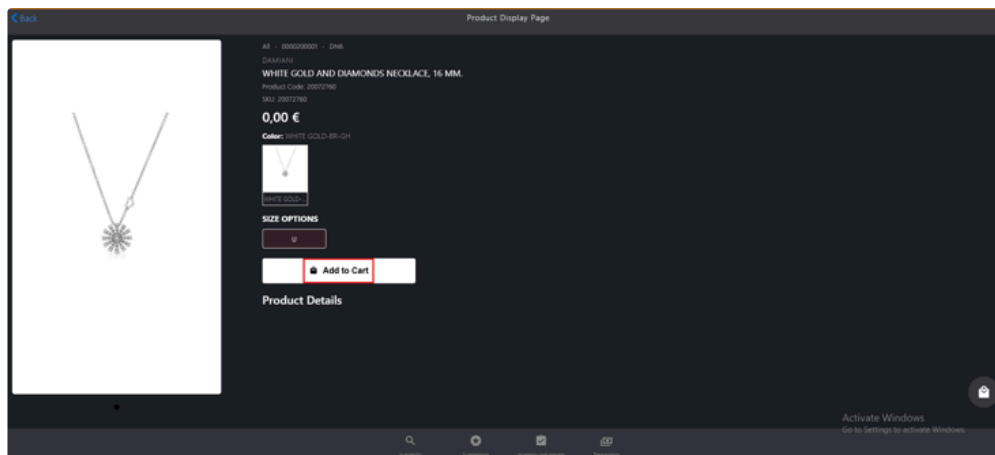
7. Search the product by name, category, upc, or id in **Products** search box.



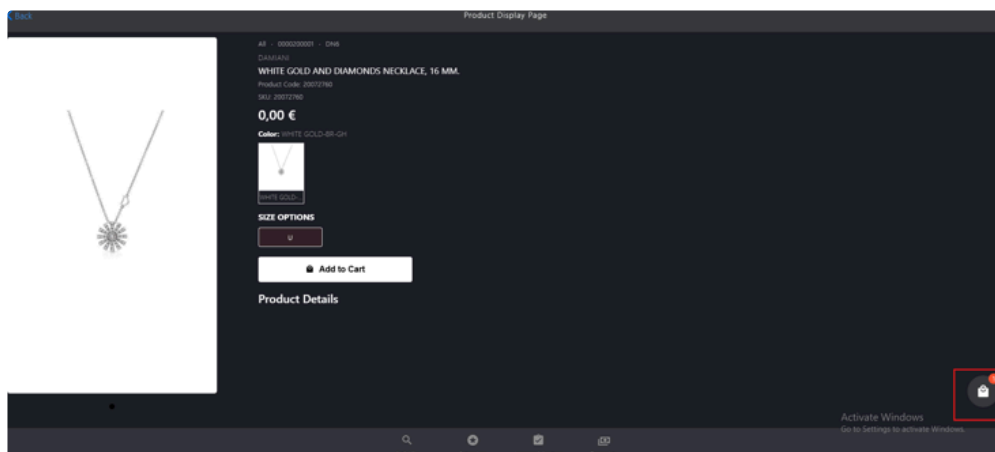
8. Click the product image.



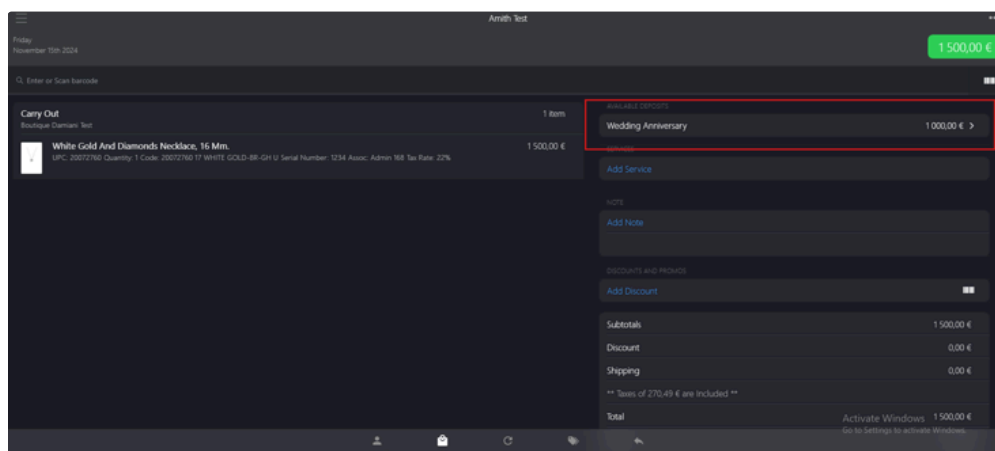
9. Click **Add to cart** on the **Product Display Page**.



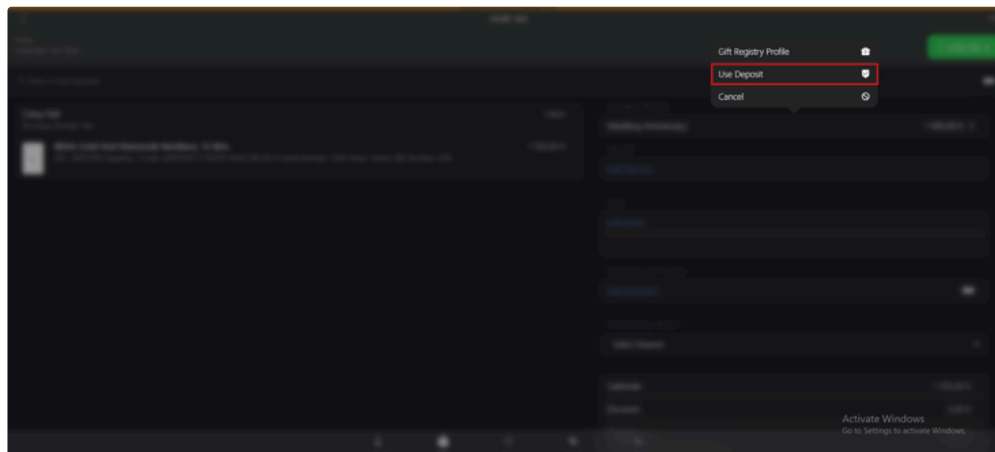
10. Click the bag icon.



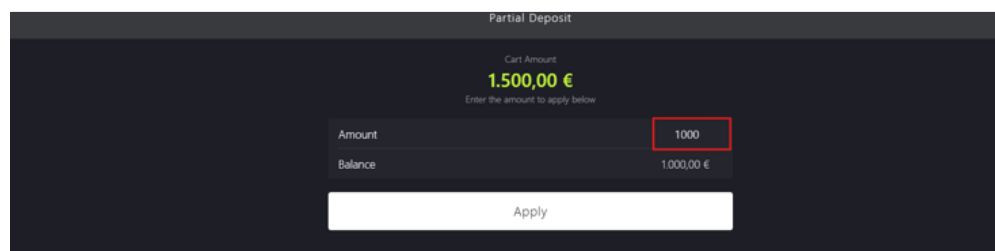
11. Click **Available Deposits** category.



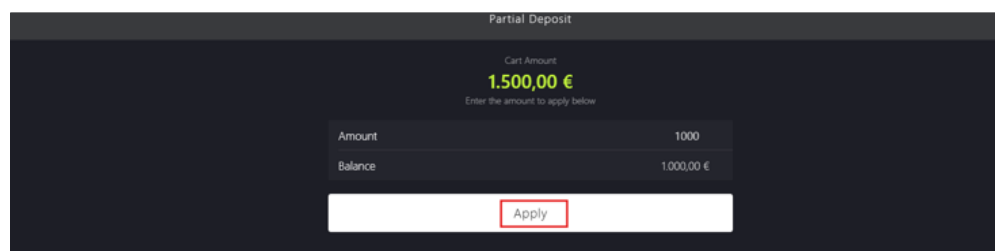
12. Click **Use Deposit** from the pop up menu.



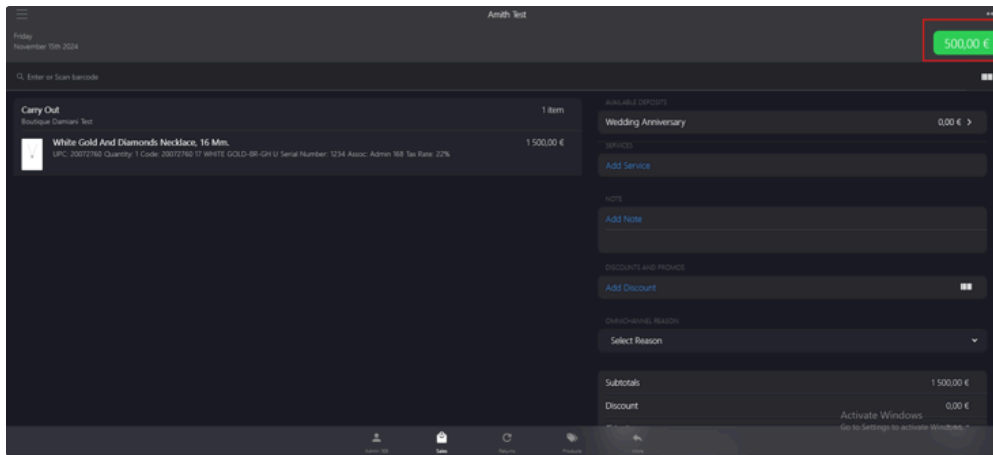
13. Enter the deposit amount you want to redeem in the **Amount** field on the **Partial Deposit** page.



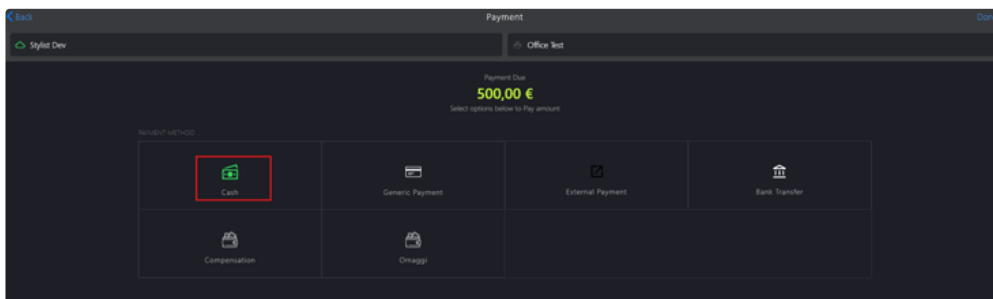
14. Click **Apply**.



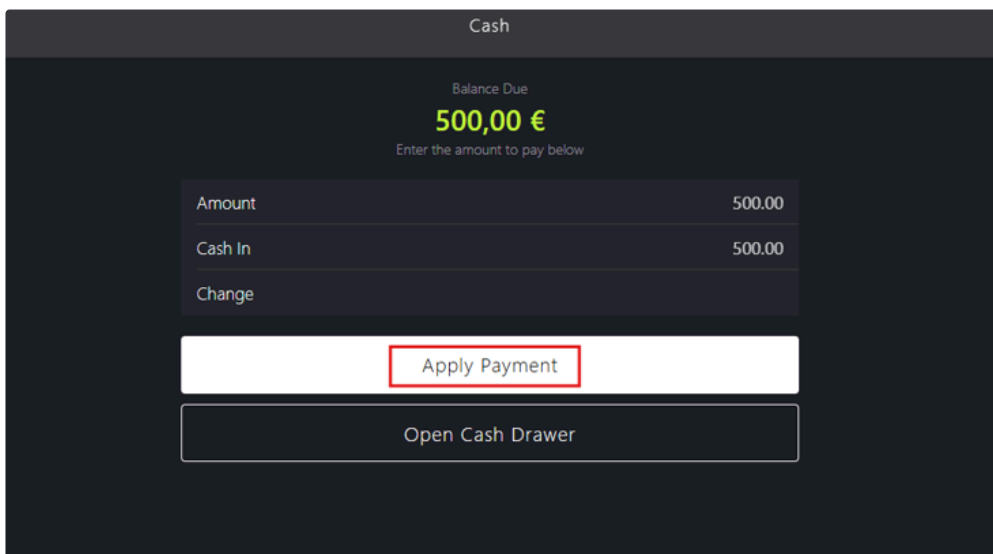
15. Click the green button in the upper-right corner.



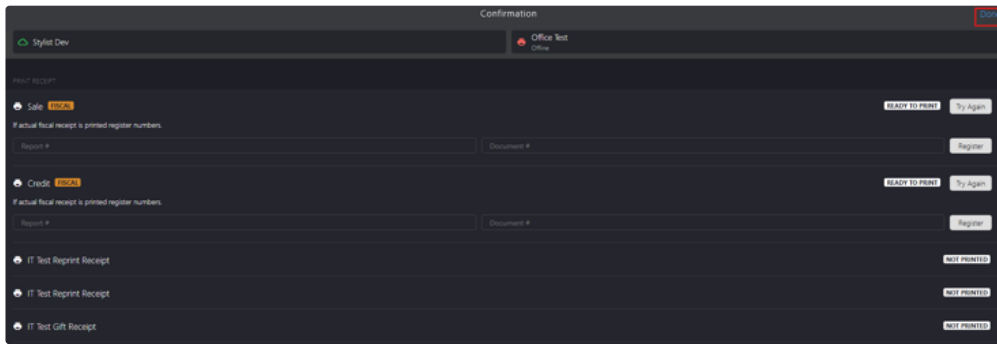
16. Select a **PAYMENT METHOD** on the **Payment** page, for example, **Cash** option.



17. Click **Apply Payment** on the **Cash** page.



18. Click Done on the **Confirmation** page.



Payment Methods

A payment method refers to a process in which the buyer transfers money or equivalent value to the retailer in return for goods or services rendered. Payment can occur in many forms, such as physical cash, electronic payments, or other methods. Selecting the correct payment method is integral to completing and expediting safe and secure transactions and is especially important in retail.

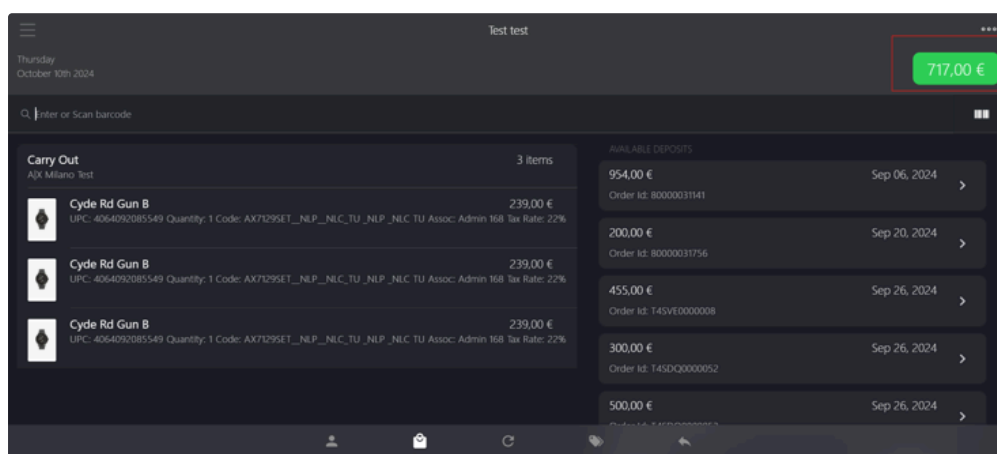
Closing Sale with Cash Payment

Introduction

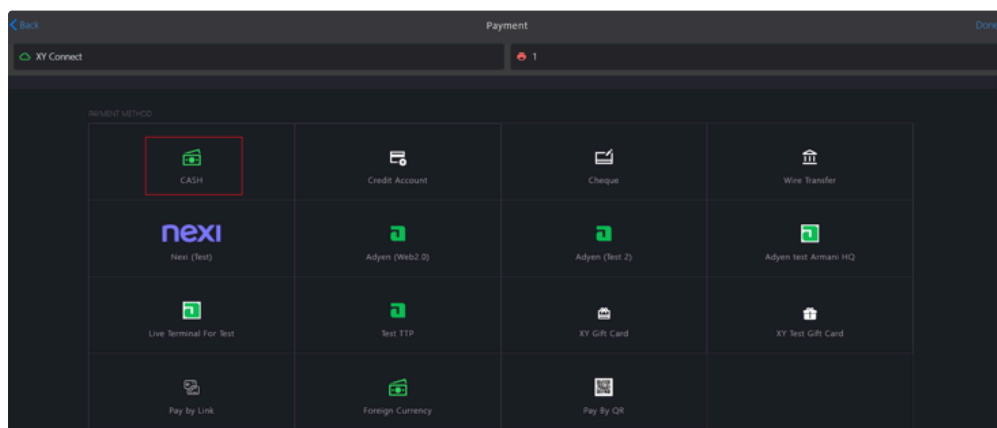
This topic explains the procedure for closing a sale with cash payment.

Steps to Close a Sale with Cash Payment

1. Click the green button.



2. Select **CASH** from the **PAYMENT METHOD**.



3. Click **Apply Payment**.

The screenshot shows a 'Cash' payment screen. At the top, it displays 'Balance Due' as 717,00 €. Below this, it prompts the user to 'Enter the amount to pay below'. A table shows the following values: Amount (717.00), Cash In (1000.00), and Change (283,00 €). A large white button labeled 'Apply Payment' is at the bottom.

Amount	717.00
Cash In	1000.00
Change	283,00 €

☰ If the **Cash In** value is higher than **Amount** value, POS automatically calculates **Change**.

4. Click **Done** to close the sale.

The screenshot shows the 'Fiscal Receipt' screen. At the top right, there is a 'Done' button. The screen displays an 'ORDER SUMMARY' for Sale #80000032657. Below this, there are sections for 'PRINT RECEIPT', 'EMAIL RECEIPT', and 'PRINT INVOICE'. The 'PRINT RECEIPT' section includes 'Sale' (READY TO PRINT), 'Reprint Receipt' (NOT PRINTED), and '[test] Gift Receipt' (NOT PRINTED). The 'EMAIL RECEIPT' section includes 'Email Receipt' (NOT SENT). The 'PRINT INVOICE' section includes 'Invoice' (NOT PRINTED).

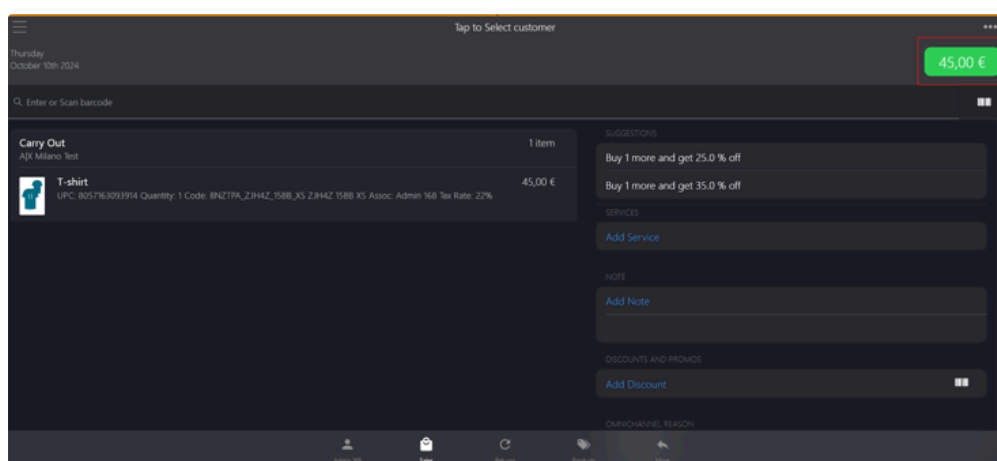
Closing Sale with Adyen Payment

Introduction

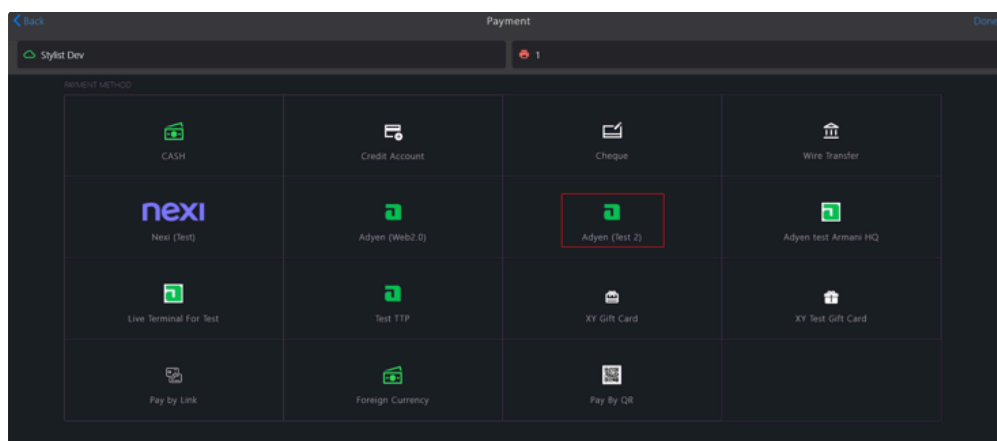
This topic explains the procedure for closing a sale with Adyen payment.

Steps to Close a Sale with Adyen Payment

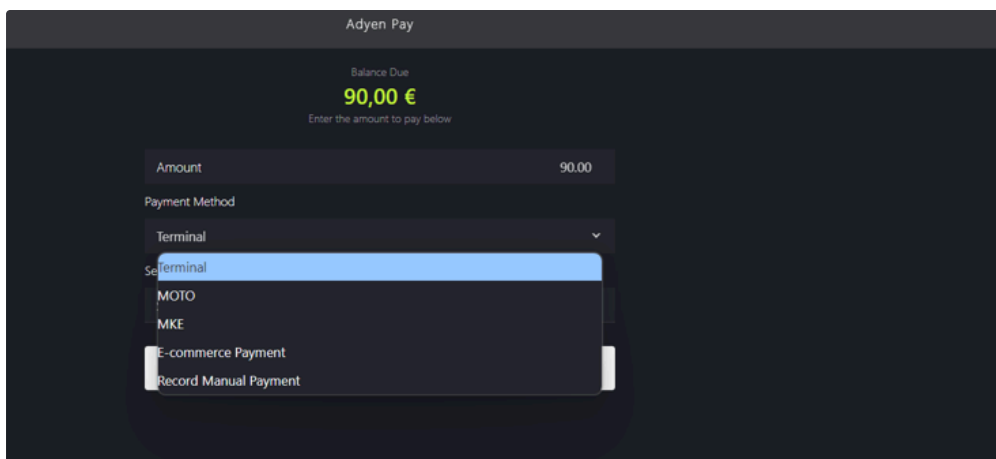
1. Click the green button.



2. Select **Adyen** from the **PAYMENT METHODS**.

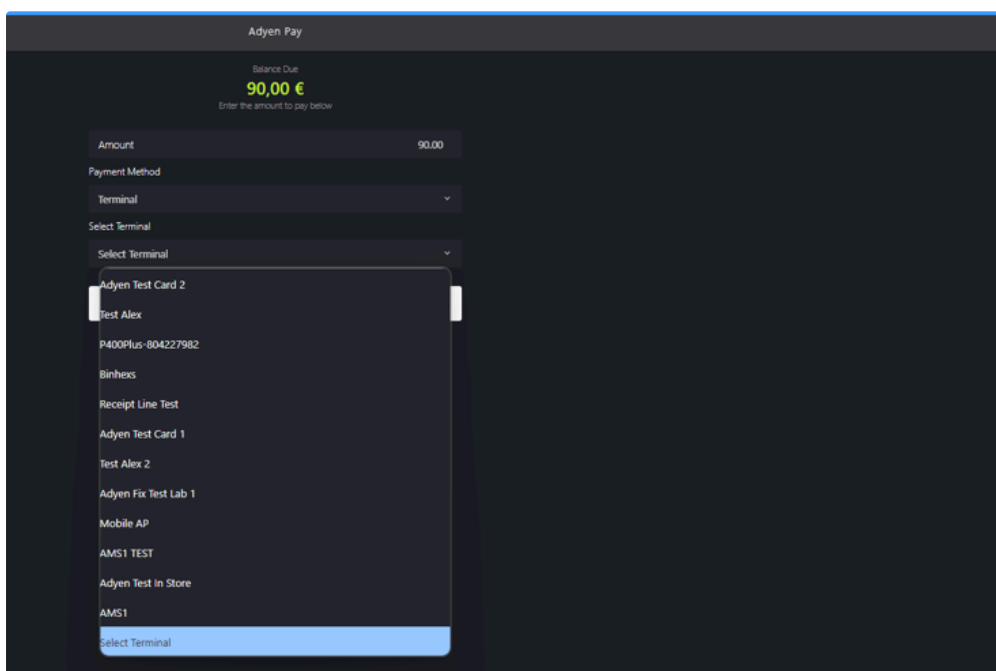


3. Select a **Payment Method** from the dropdown menu.



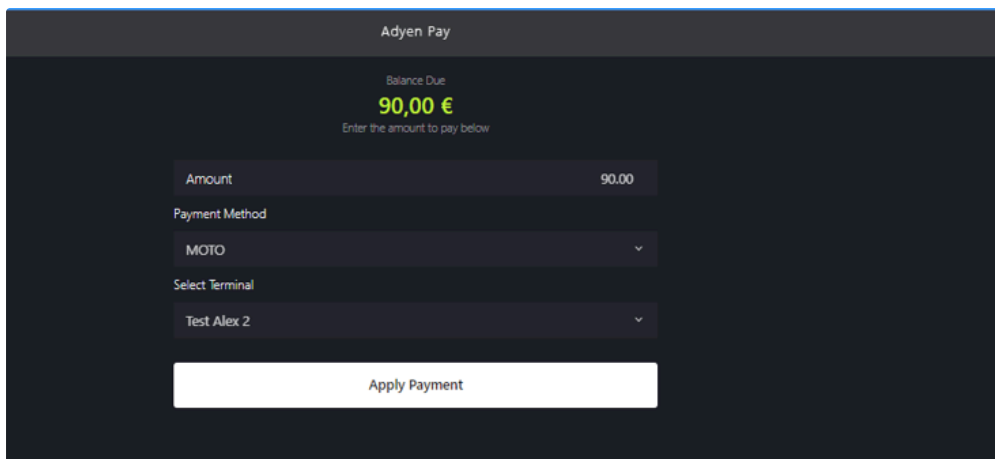
The screenshot shows the Adyen Pay interface. At the top, it says "Adyen Pay". Below that, it displays "Balance Due" as "90,00 €" and "Enter the amount to pay below". There is a field for "Amount" with the value "90.00". Under "Payment Method", a dropdown menu is open, showing options: "Terminal" (highlighted in blue), "MOTO", "MKE", "E-commerce Payment", and "Record Manual Payment".

4. Select a **Terminal** from the dropdown menu.



The screenshot shows the Adyen Pay interface. At the top, it says "Adyen Pay". Below that, it displays "Balance Due" as "90,00 €" and "Enter the amount to pay below". There is a field for "Amount" with the value "90.00". Under "Payment Method", a dropdown menu is open, showing options: "Terminal" (highlighted in blue), "MOTO", "MKE", "E-commerce Payment", and "Record Manual Payment". Below the "Terminal" dropdown, there is a "Select Terminal" dropdown menu, which is also open, showing a list of terminals: "Adyen Test Card 2", "Test Alex", "P400Plus-804227982", "Binhex", "Receipt Line Test", "Adyen Test Card 1", "Test Alex 2", "Adyen Fix Test Lab 1", "Mobile AP", "AMSI TEST", "Adyen Test in Store", "AMSI", and "Select Terminal" (highlighted in blue).

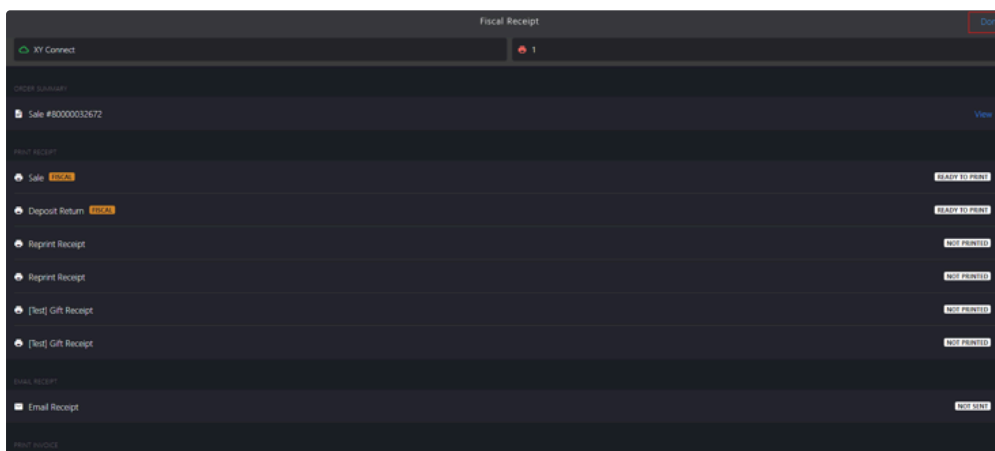
5. Click **Apply Payment**.



The screenshot shows the Adyen Pay interface. At the top, it says "Adyen Pay". Below that, it displays "Balance Due" as "90,00 €" in green. Underneath, it says "Enter the amount to pay below". There are three dropdown menus: "Amount" set to "90.00", "Payment Method" set to "MOTO", and "Select Terminal" set to "Test Alex 2". At the bottom, there is a white button labeled "Apply Payment".

- A payment request is generated in the payment terminal, and sales associate can request customer to proceed with the payment.

6. Click **Done** to close the sale.



The screenshot shows the "Fiscal Receipt" screen. At the top right, there is a "Done" button. The screen displays a list of receipts under the heading "FISCAL RECEIPT". The first receipt is "Sale #80000032672" with a "View" link. Below it, there are several receipt entries with status indicators: "Sale" (READY TO PRINT), "Deposit Return" (READY TO PRINT), two "Reprint Receipt" entries (NOT PRINTED), two "[Test] Gift Receipt" entries (NOT PRINTED), and "Email Receipt" (NOT SENT).

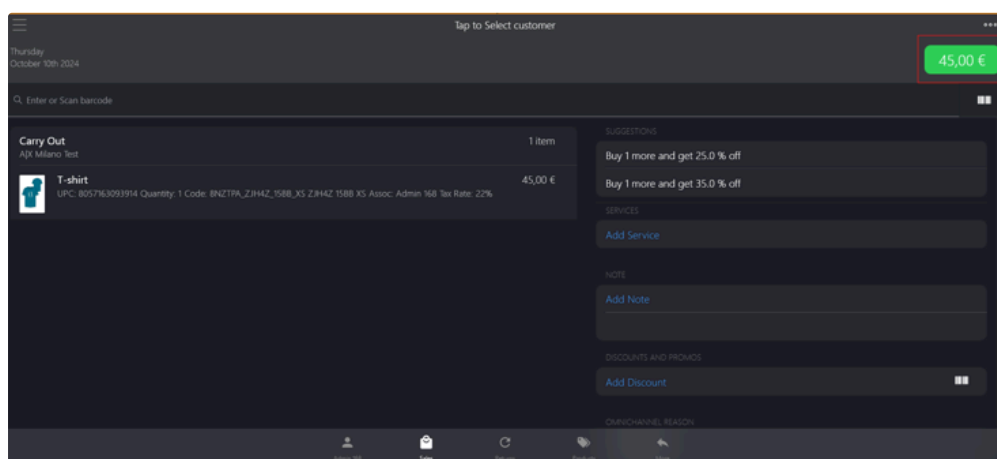
Closing Sale Manually During Adyen Network Error

Introduction

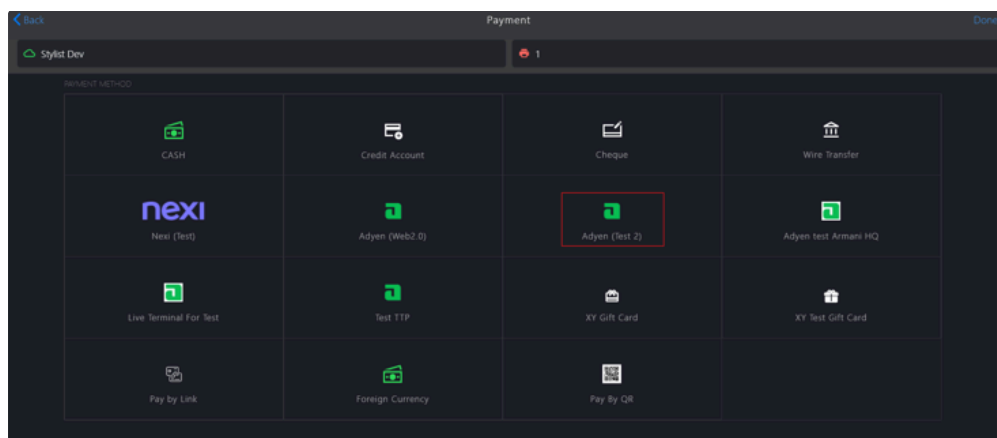
This topic explains the procedure for closing a sale manually when there is a network error connecting to the Adyen payment terminal.

Steps to Close a Sale Manually During Adyen Network Error

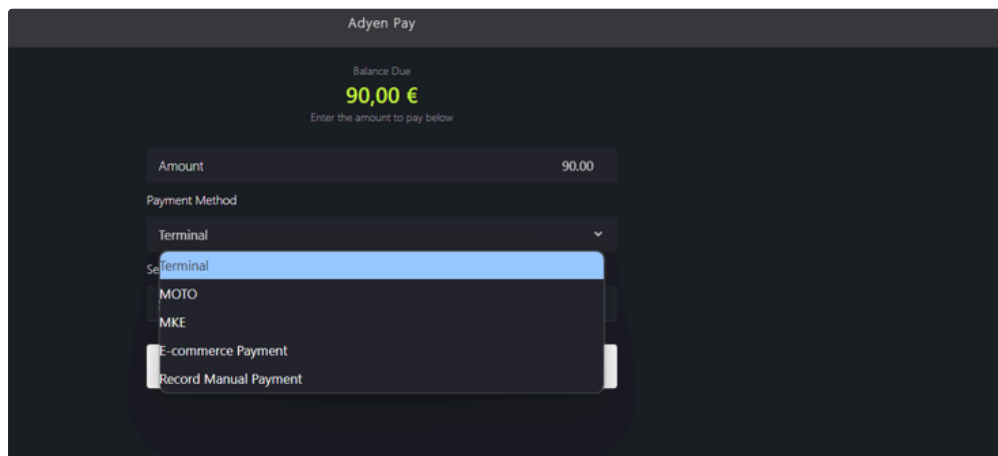
1. Click the green button.



2. Select **Adyen** from the **PAYMENT METHODS**.

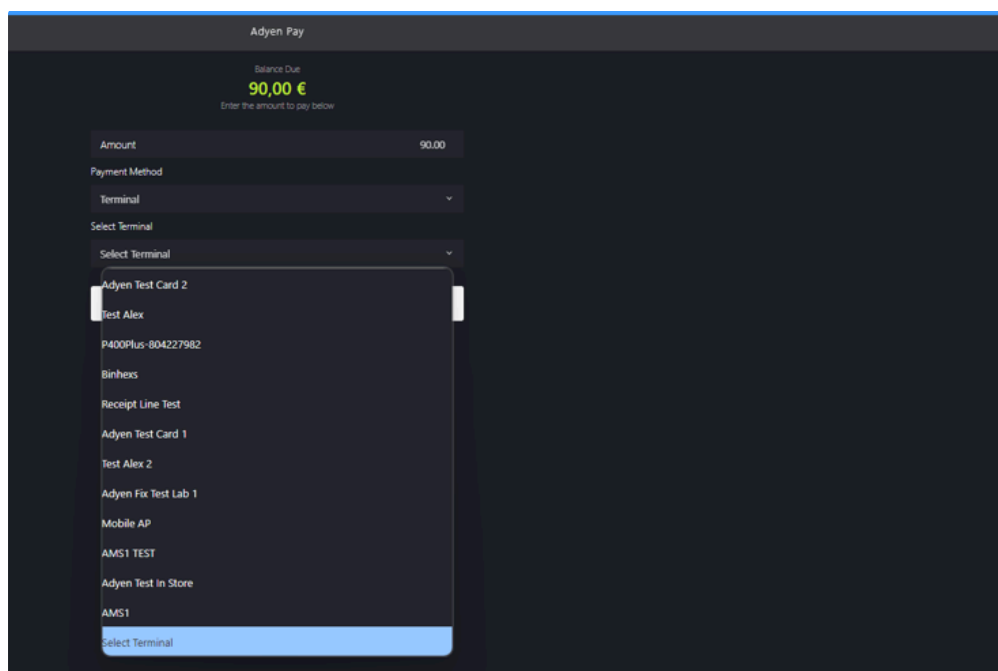


3. Select a **Payment Method** from the dropdown menu.



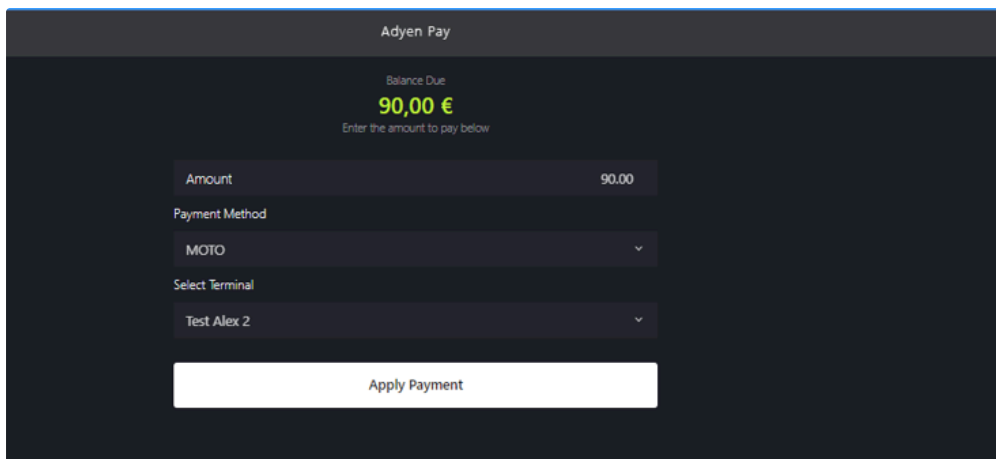
The screenshot shows the Adyen Pay interface. At the top, it says "Adyen Pay". Below that, "Balance Due" is displayed as "90,00 €" in green, with the instruction "Enter the amount to pay below". There is a text input field for "Amount" containing "90.00". Below this is a "Payment Method" dropdown menu. The dropdown is open, showing a list of options: "Terminal" (highlighted in blue), "MOTO", "MKE", "E-commerce Payment", and "Record Manual Payment".

4. Select a **Terminal** from the dropdown menu.



The screenshot shows the Adyen Pay interface. At the top, it says "Adyen Pay". Below that, "Balance Due" is displayed as "90,00 €" in green, with the instruction "Enter the amount to pay below". There is a text input field for "Amount" containing "90.00". Below this is a "Payment Method" dropdown menu. The dropdown is open, showing a list of options: "Terminal" (highlighted in blue), "MOTO", "MKE", "E-commerce Payment", and "Record Manual Payment". Below the "Terminal" option, there is a "Select Terminal" dropdown menu. This dropdown is also open, showing a list of terminal names: "Adyen Test Card 2", "Test Alex", "P400Plus-804227982", "Binhexs", "Receipt Line Test", "Adyen Test Card 1", "Test Alex 2", "Adyen Fix Test Lab 1", "Mobile AP", "AMS1 TEST", "Adyen Test In Store", "AMS1", and "Select Terminal" (highlighted in blue).

5. Click **Apply Payment**.



Adyen Pay

Balance Due
90,00 €
Enter the amount to pay below

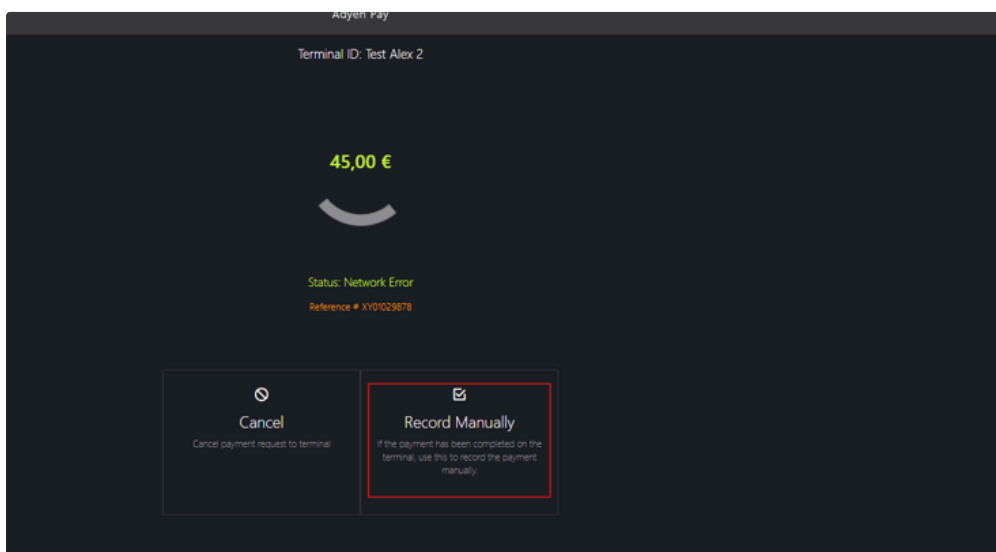
Amount 90.00

Payment Method
MOTO

Select Terminal
Test Alex 2

Apply Payment

6. Click **Record Manually** to manually proceed the payment.



Adyen Pay

Terminal ID: Test Alex 2

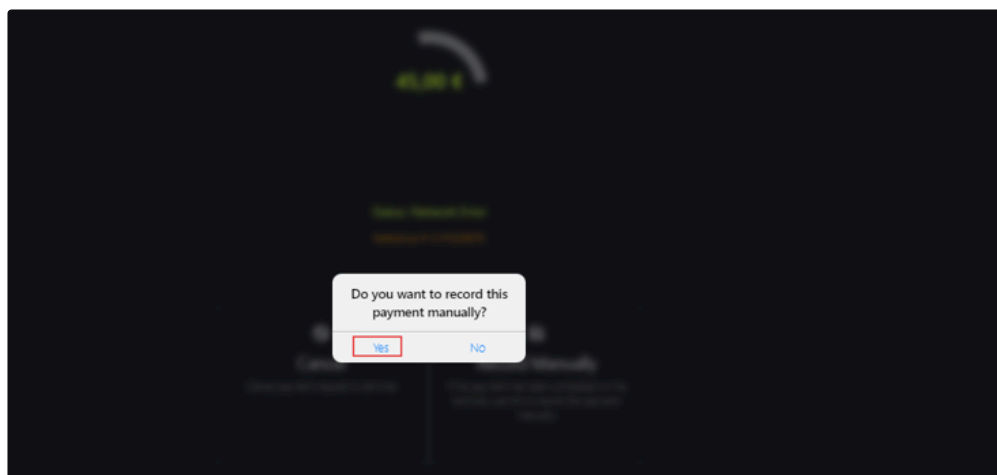
45,00 €

Status: Network Error
Reference # XY01029878

Cancel
Cancel payment request to terminal

Record Manually
If the payment has been completed on the terminal, use this to record the payment manually.

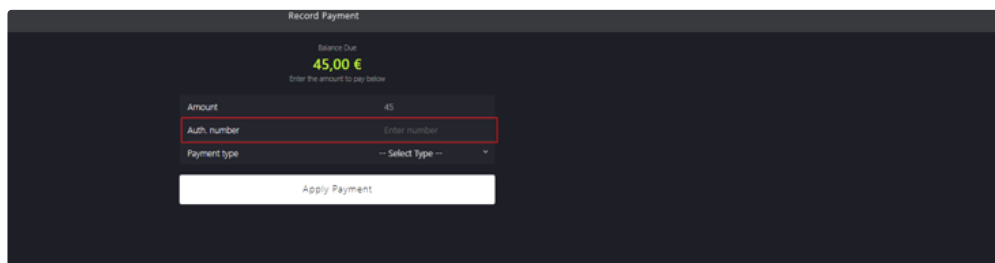
7. Click **Yes** on the dialog box.



Do you want to record this payment manually?

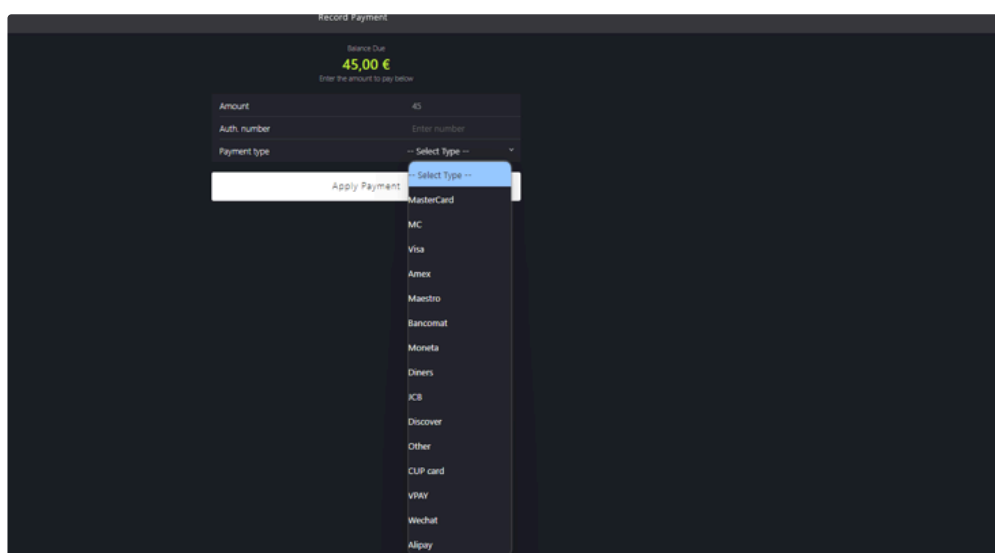
Yes No

8. Enter the authorization number in **Auth.number** field.



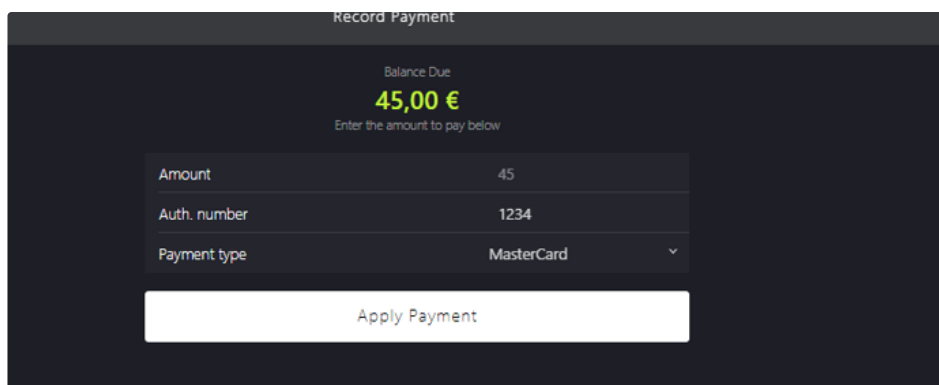
The screenshot shows the 'Record Payment' interface. At the top, it displays 'Balance Due' as '45,00 €' with the instruction 'Enter the amount to pay below'. Below this, there are three input fields: 'Amount' (containing '45'), 'Auth.number' (containing '1234'), and 'Payment type' (a dropdown menu set to '-- Select Type --'). The 'Auth.number' field is highlighted with a red border. At the bottom, there is a white 'Apply Payment' button.

9. Select a **Payment type** from the dropdown menu.



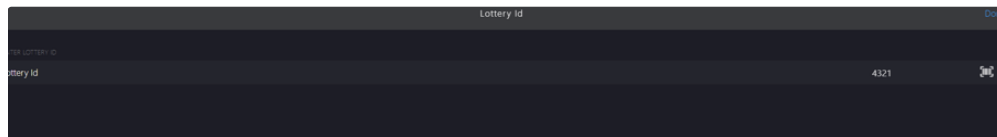
The screenshot shows the 'Record Payment' interface with the 'Payment type' dropdown menu open. The menu lists several payment methods: MasterCard, MC, Visa, Amex, Maestro, Bancomat, Moneta, Diners, JCB, Discover, Other, CLIP card, VISA, Wechat, and Alipay. The 'Apply Payment' button is visible at the bottom of the form.

10. Click **Apply Payment** again to confirm the transaction.

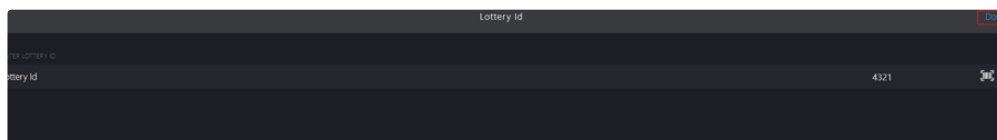


The screenshot shows the 'Record Payment' interface after the transaction is confirmed. The 'Amount' field now contains '45', the 'Auth.number' field contains '1234', and the 'Payment type' dropdown menu is set to 'MasterCard'. The 'Apply Payment' button is still visible at the bottom.

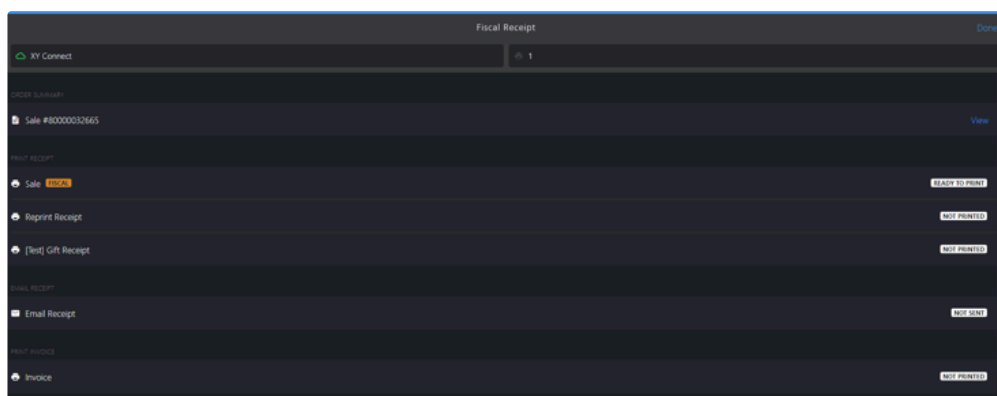
11. Manually enter or scan the id into the **Lottery ID** field (optional).



12. Click **Done** to proceed with the payment.



13. Click **Done** to close the sale.



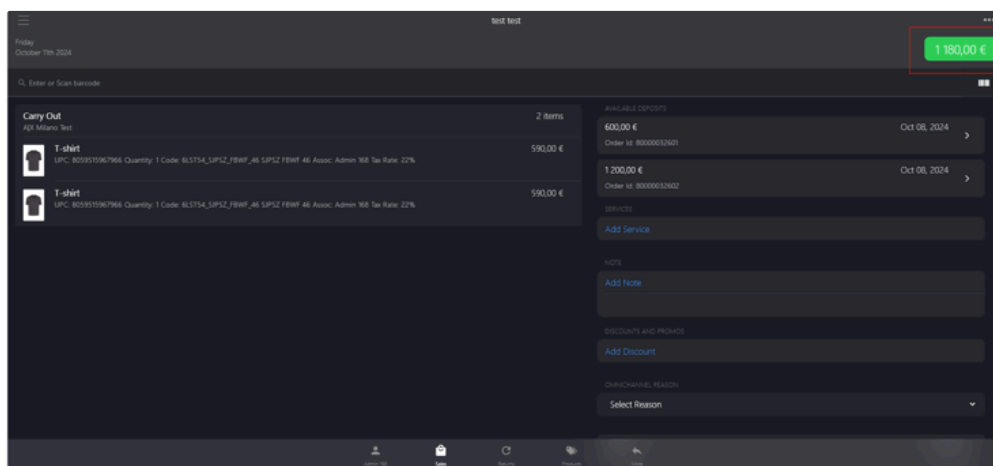
Closing Sale with Split Payment

Introduction

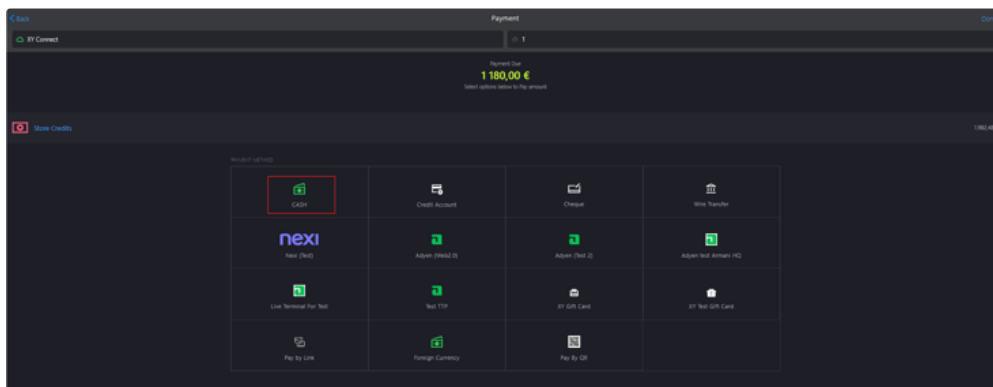
This topic explains the procedure for closing a sale using split payment method, which involves a combination of cash and other payment options.

Steps to Close a Sale with Split Payment

1. Click the green button.



2. Click **CASH** from **PAYMENT METHOD**.



3. Enter **Amount** value to be paid in cash.

Cash

Balance Due
1 180,00 €
Enter the amount to pay below

Amount	1000
Cash In	1200
Change	200,00 €

Apply Payment


4. Enter **Cash In** value provided by the customer.

Cash

Balance Due
1 180,00 €
Enter the amount to pay below

Amount	1000
Cash In	1200
Change	200,00 €

Apply Payment

 POS automatically calculates **Change** value.

5. Click **Apply Payment**.

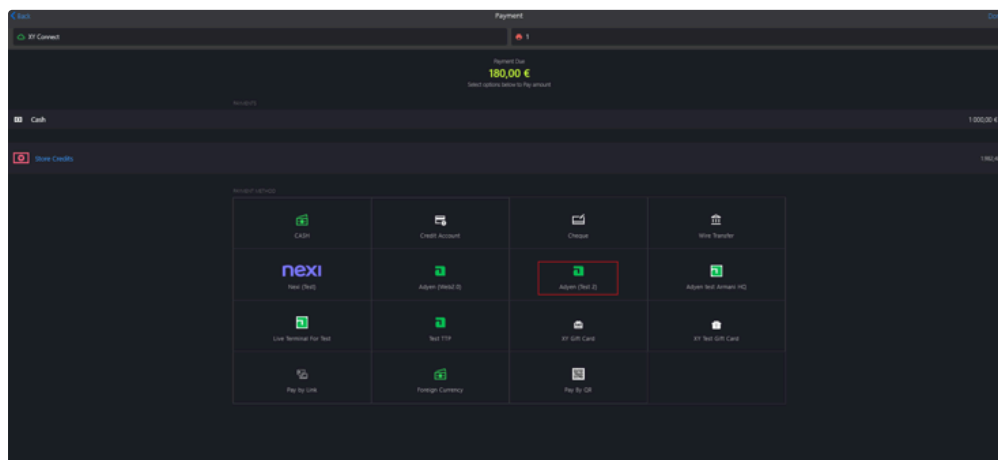
Cash

Balance Due
1 180,00 €
Enter the amount to pay below

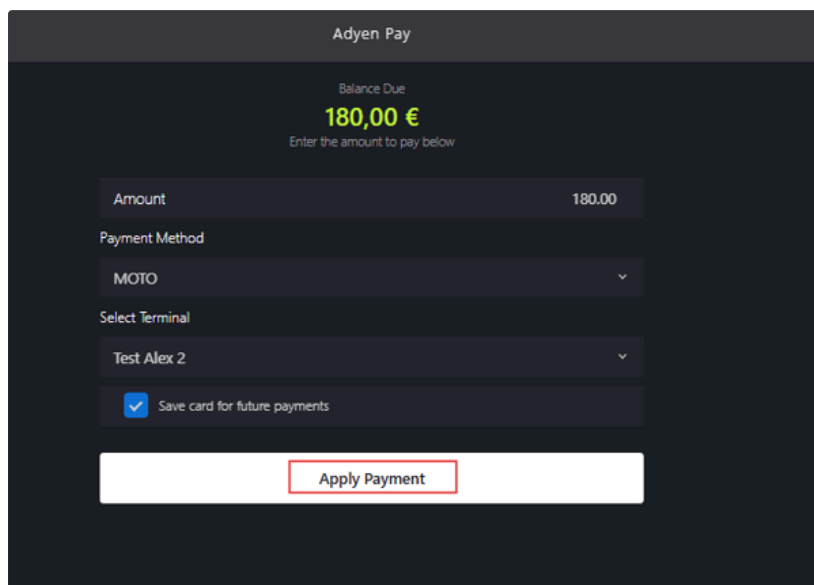
Amount	1000
Cash In	1200
Change	200,00 €

Apply Payment

6. Select a preferred payment method other than **CASH**, for example, Ayen is selected.



7. Click **Apply Payment** again to close the sale.



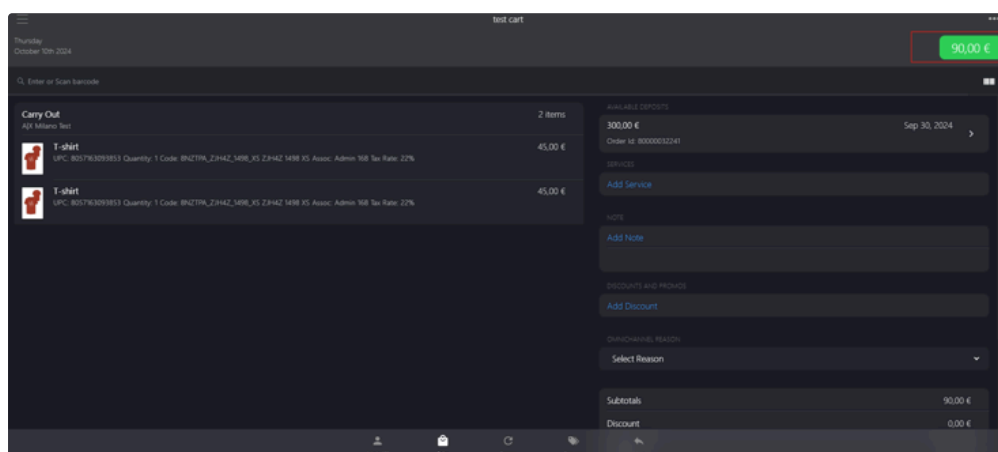
Closing Sale with Store Credits

Introduction

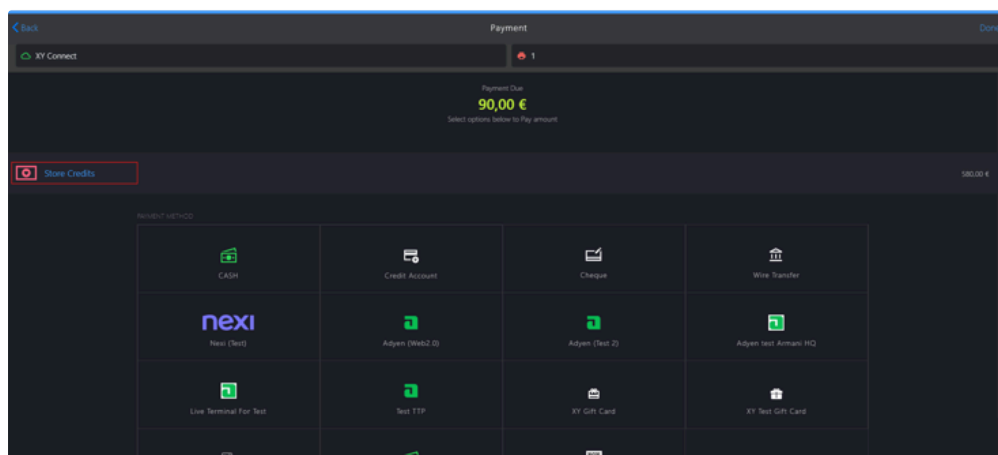
This topic explains the procedure for closing a sale with store credit.

Steps to Close a Sale with Store Credits

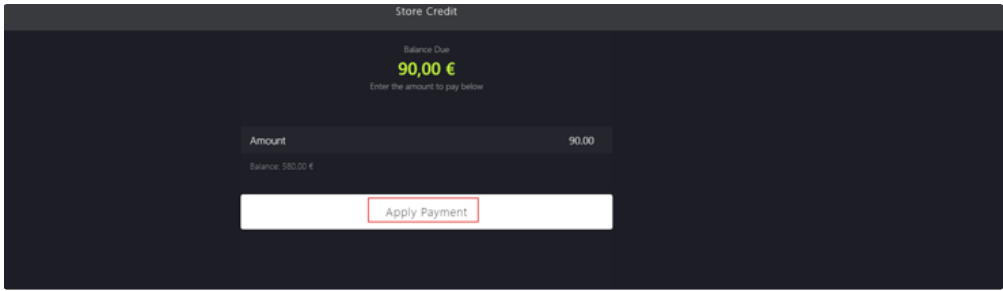
1. Click the green button.



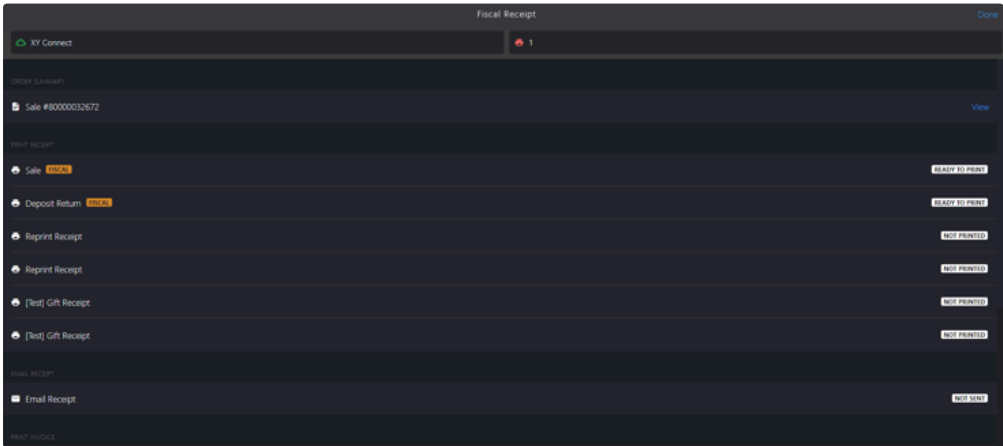
2. Click **Store Credits**.



3. Click **Apply Payment**.



4. Click **Done** to close the sale.



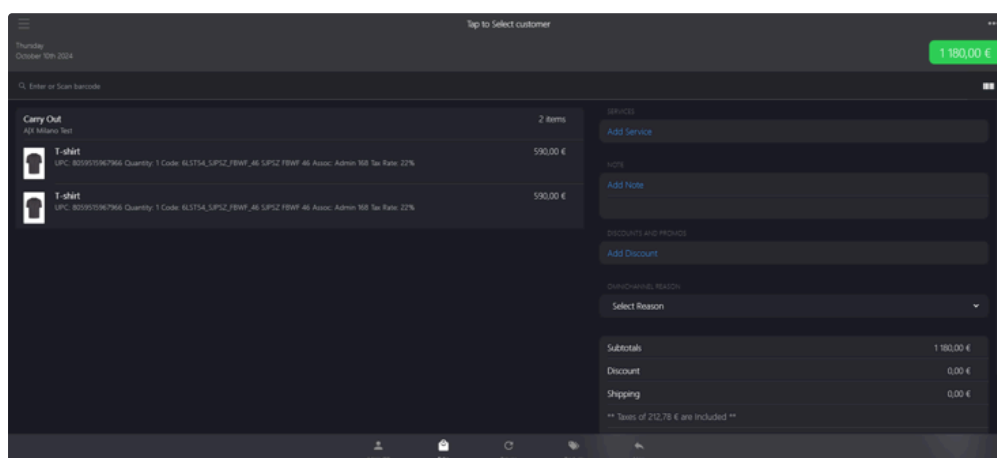
Closing Sale with Nexi Payment

Introduction

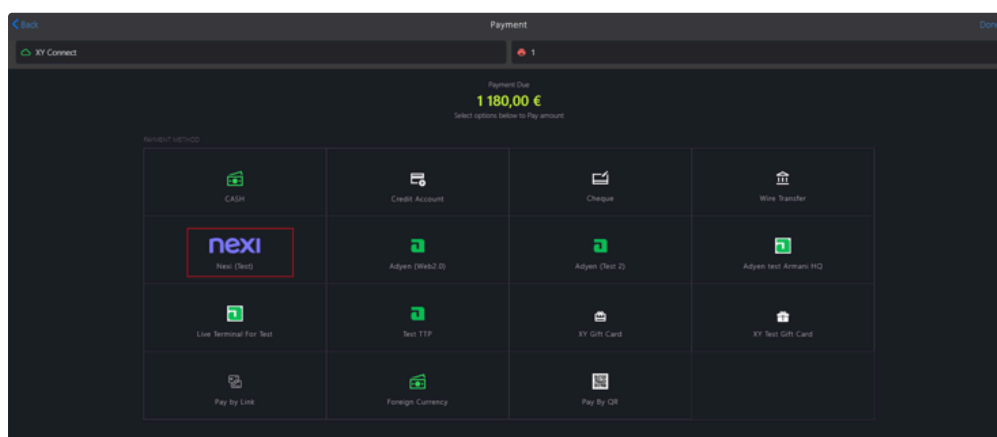
This topic explains the procedure for closing a sale with Nexi payment.

Steps to Close a Sale with Nexi Payment

1. Click the green button.



2. Select nexi from the **PAYMENT METHOD**.



3. Click **Manual Payment**.

Credit/Debit Pay

Balance Due
1 180,00 €
Enter the amount to pay below

Amount	1180.00
--------	---------

Apply Payment

Manual Payment

4. Enter the authorisation number in **Auth.number** field.

Nexi Manual Pay

Balance Due
1 180,00 €
Enter the amount to pay below

Amount	1180.00
Auth. number	Enter number
Payment type	-- Select Type --

Apply Payment

5. Select a payment method from **Payment type** dropdown menu.

Nexi Manual Pay

Balance Due
1 180,00 €
Enter the amount to pay below

Amount	1180.00
Auth. number	Enter number
Payment type	-- Select Type --

Apply Payment

6. Click **Apply Payment**.

Nexi Manual Pay

Balance Due
1 180,00 €
Enter the amount to pay below

Amount	1180.00
Auth. number	Enter number
Payment type	-- Select Type --

Apply Payment

7. Manually enter or scan the id into the **Lottery ID** field (optional).

Lottery id Done

Lottery id Enter id

8. Click **Done** to proceed with the payment.

Lottery id Done

Lottery id Enter id

9. Click **Done** to close the sale.

Fiscal Receipt Done

XY Connect 1

CRDM Subtotal

Sale #18000032676 View

Print Receipt

- Sale READY TO PRINT
- Reprint Receipt NOT PRINTED
- [Hot] Gift Receipt NOT PRINTED

Email Receipt

- Email Receipt NOT SENT

Print Invoice

- Invoice NOT PRINTED

Close Drawer

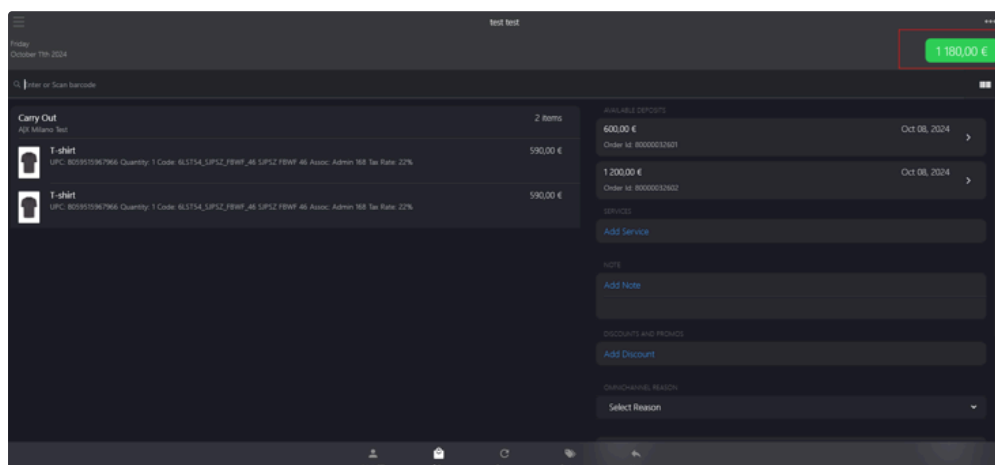
Closing Sale with Pay by Link

Introduction

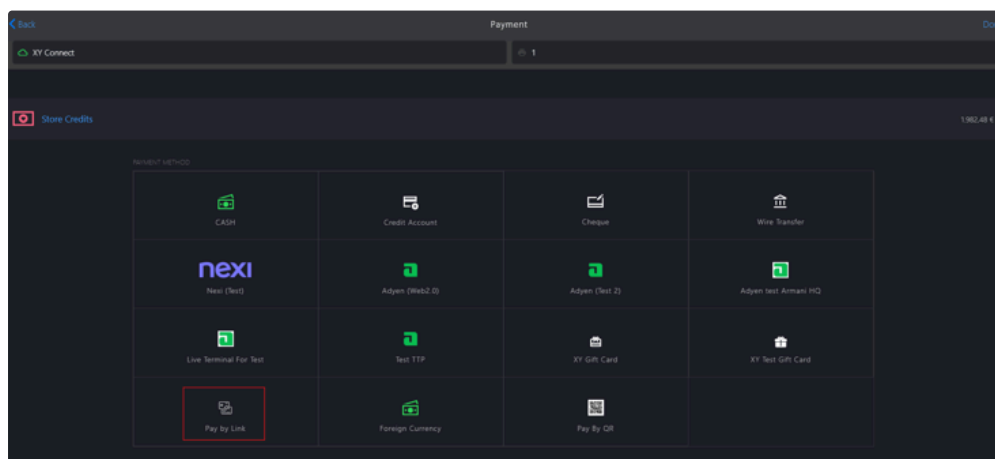
This topic explains the procedure for closing a sale with pay by link.

Steps to Close a Sale with Pay by Link

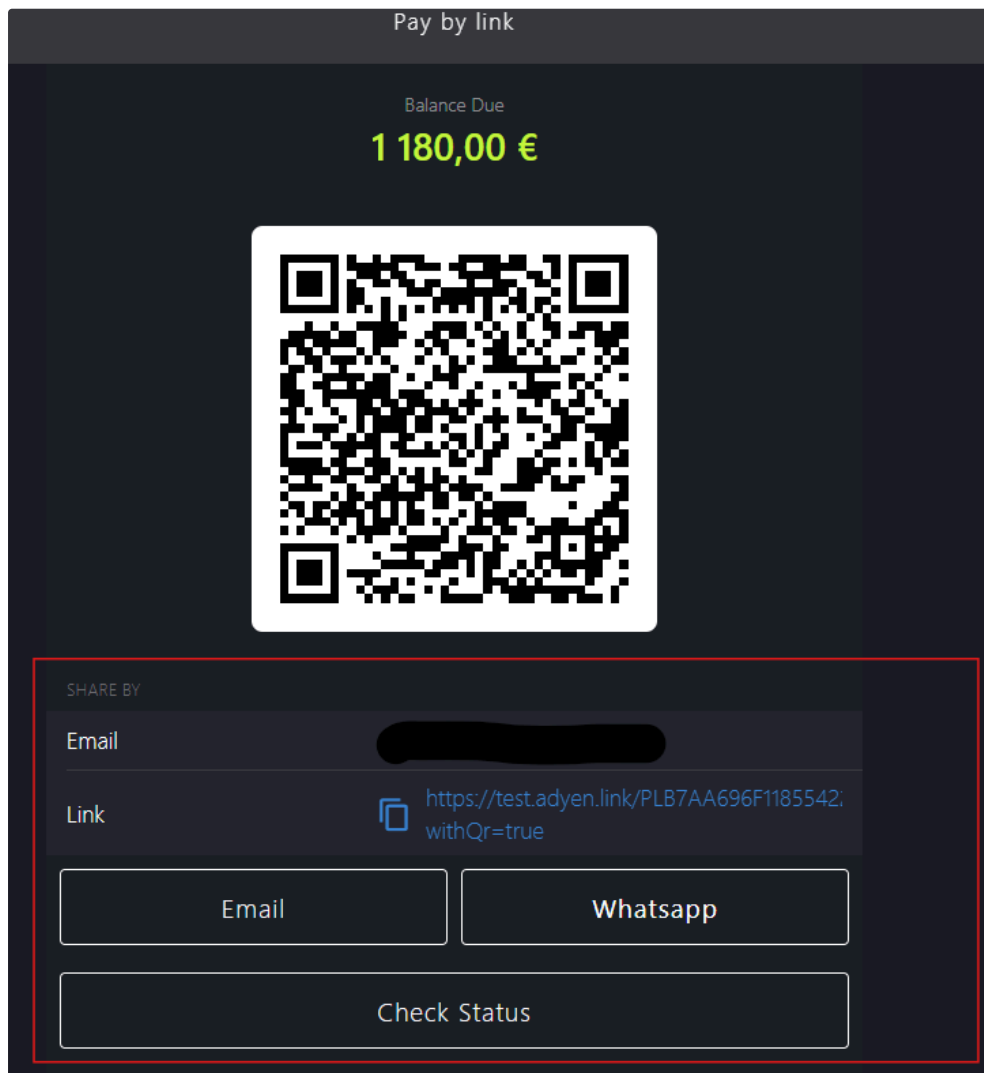
1. Click the green button.



2. Select **Pay by Link** from **PAYMENT METHOD**.



3. Share the payment link using following methods (optional):




- Email
- Whatsapp
- Copy the payment link provided and share it directly to the customer.

4. After payment, click **Check Status** to verify if the payment was successfully done.

Pay by link

Balance Due
1 180,00 €



SHARE BY

Email [Redacted]

Link [https://test.adyen.link/PLB7AA696F1185542;
withQr=true](https://test.adyen.link/PLB7AA696F1185542;withQr=true)

Email Whatsapp

Check Status

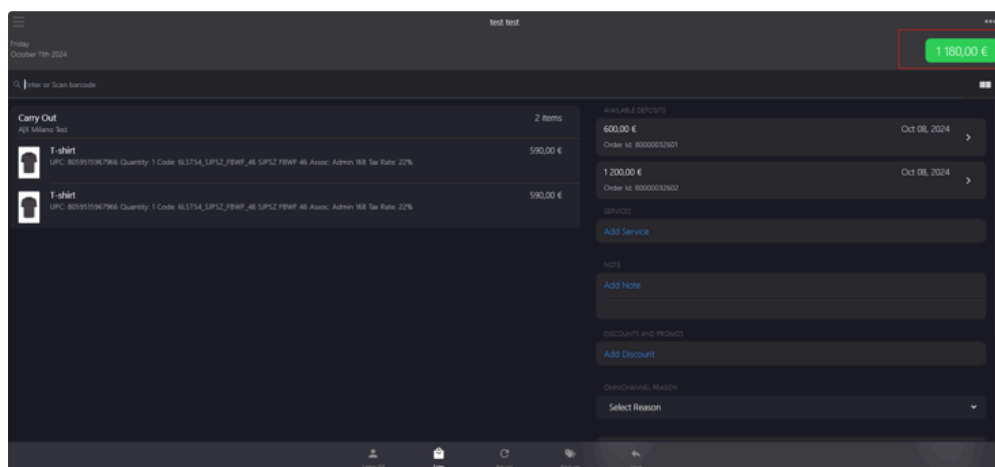
Closing Sale with QR Code

Introduction

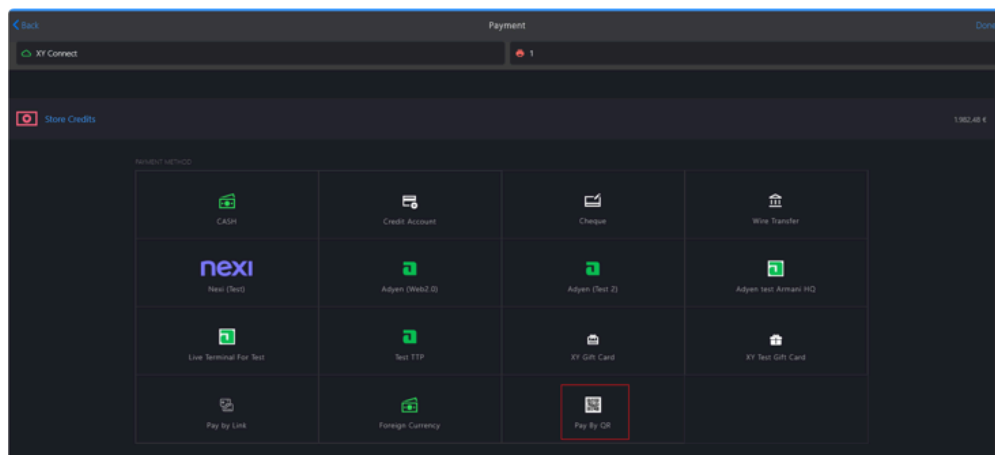
This topic explains the procedure for closing a sale with QR code.

Steps to Close a Sale with QR Code

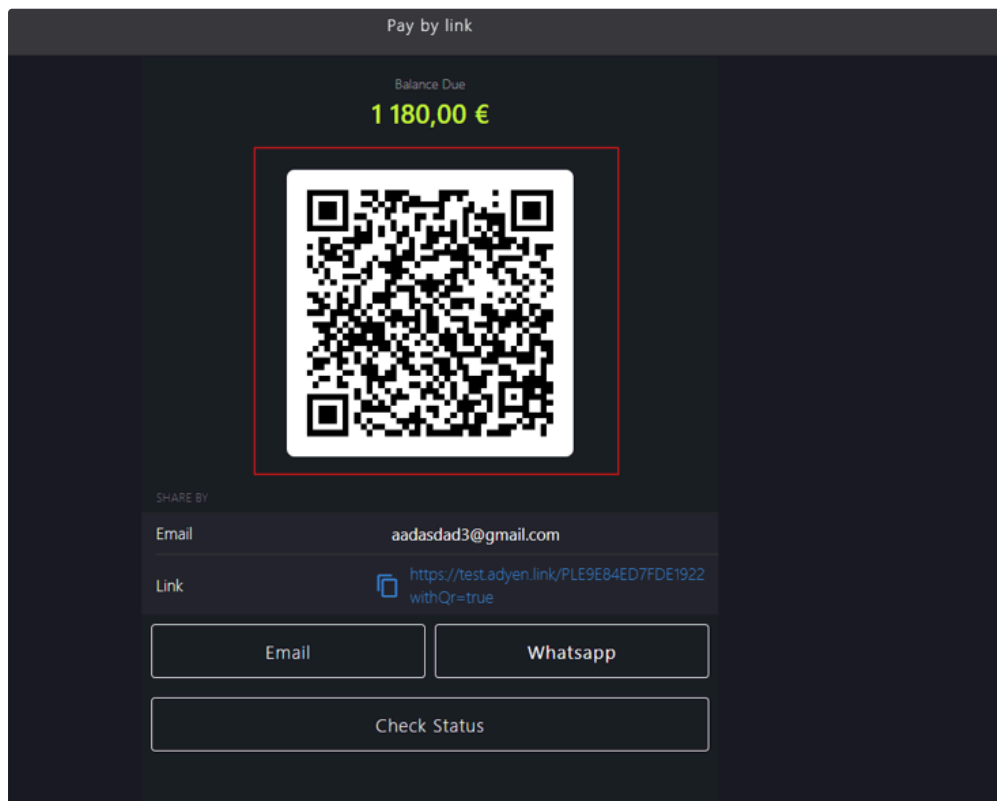
1. Click the green button.



2. Select **Pay by QR** from **PAYMENT METHOD**.




3. Please scan the QR code using a appropriate payment application scanner.



4. After payment, click **Check Status** to verify if the payment was successfully done.


Pay by link

Balance Due
1 180,00 €



SHARE BY

Email aadasdad3@gmail.com

Link  <https://test.adyen.link/PL177303EBC5E3102c>

Email Whatsapp

Check Status

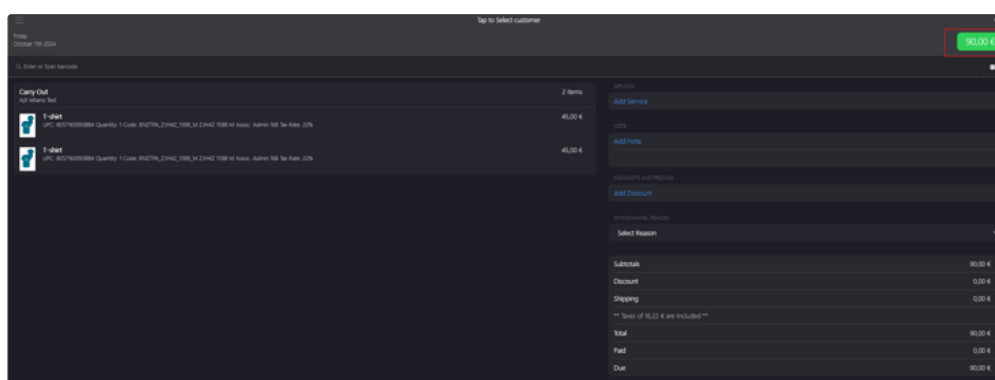
Closing Sale with Wire Transfer

Introduction

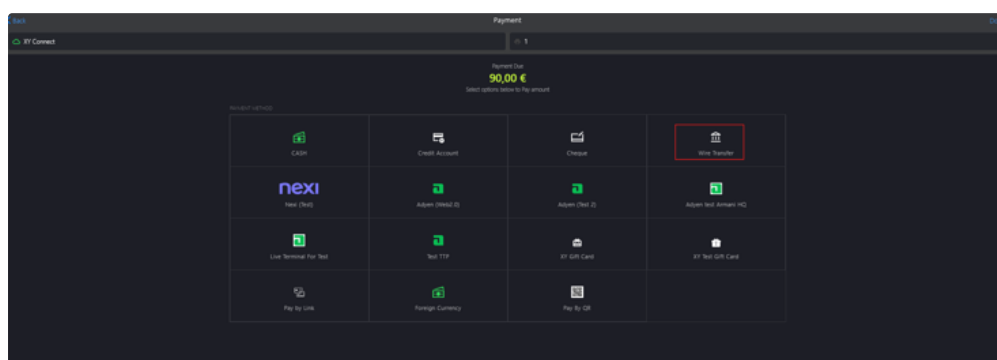
This topic explains the procedure for closing a sale with wire transfer.

Steps to Close a Sale with Wire Transfer

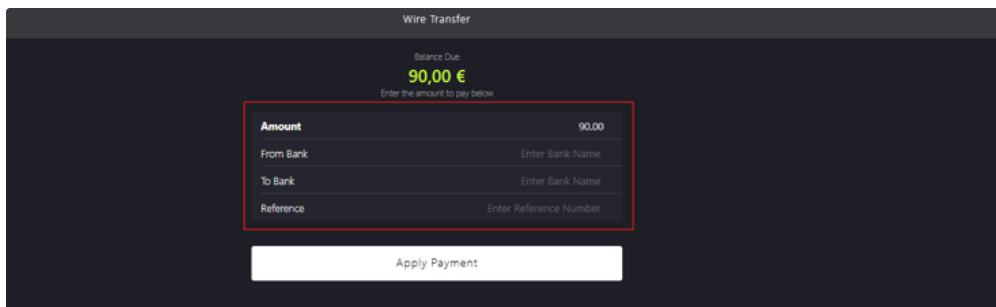
1. Click the green button.



2. Select **Wire Transfer** from **PAYMENT METHOD**.



3. Enter the following information to proceed with payment:



Wire Transfer

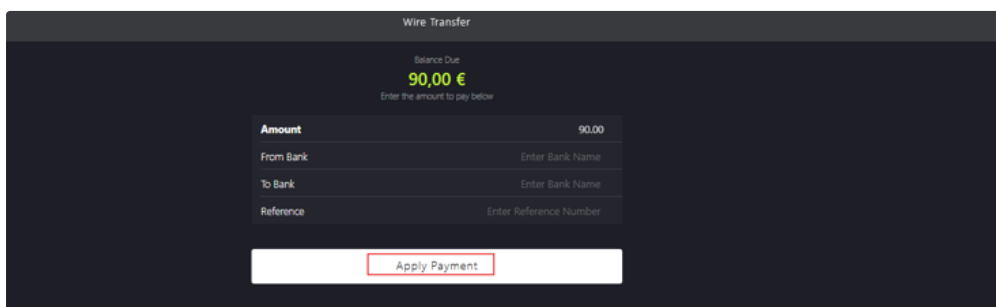
Balance Due
90,00 €
Enter the amount to pay below

Amount	90.00
From Bank	Enter Bank Name
To Bank	Enter Bank Name
Reference	Enter Reference Number

Apply Payment

- From Bank:** Enter the bank's name from which the funds will be transferred.
- To Bank Name:** Enter the bank's name to which the funds will be transferred.
- Reference Number:** Enter the reference number associated with the wire transfer.

4. Click **Apply Payment**.



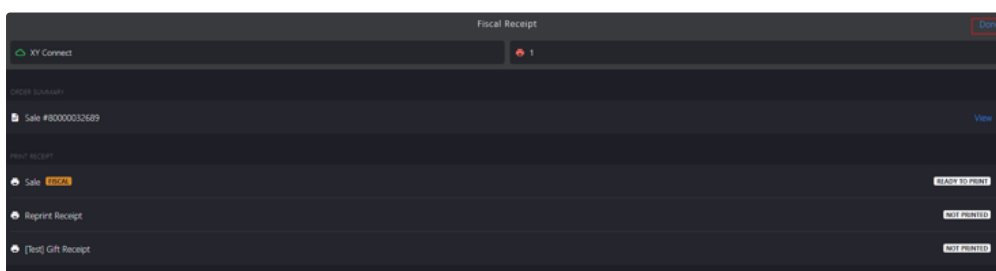
Wire Transfer

Balance Due
90,00 €
Enter the amount to pay below

Amount	90.00
From Bank	Enter Bank Name
To Bank	Enter Bank Name
Reference	Enter Reference Number

Apply Payment

5. Click **Done** to close the sale.



Fiscal Receipt

XY Connect

1

SALES SUMMARY

Sale #80000032689 [View](#)

PRINT RECEIPT

Sale **17025** [READY TO PRINT](#)

Reprint Receipt [NOT PRINTED](#)

[Text] Gift Receipt [NOT PRINTED](#)

Done

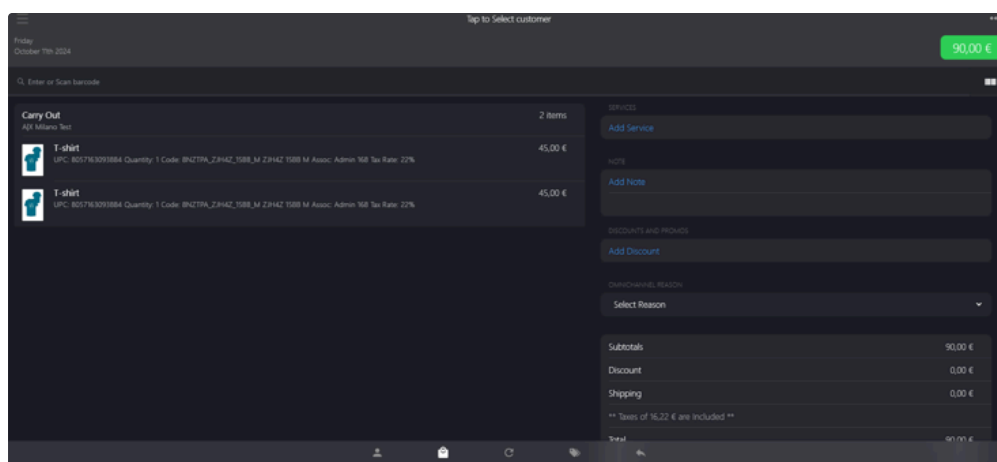
Closing Sale with Cheque

Introduction

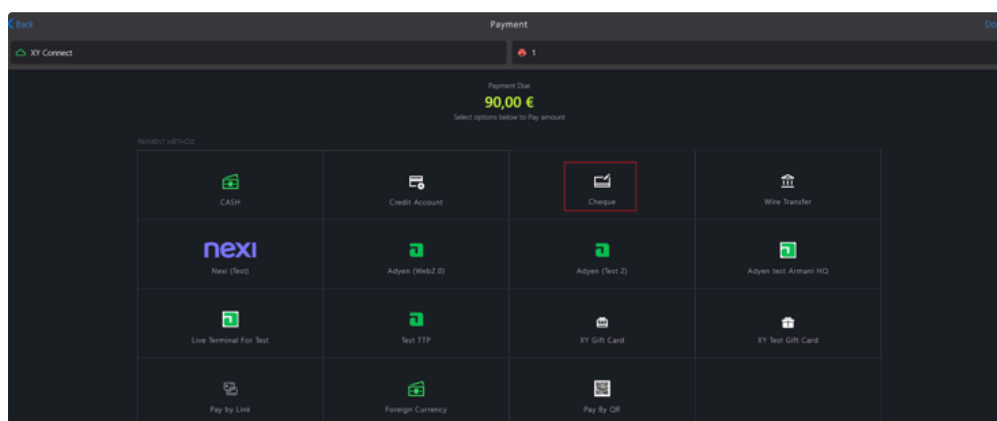
This topic explains the procedure for closing a sale with cheque.

Steps to Close a Sale with Wire Transfer

1. Click the green button.



2. Select **Cheque** from **PAYMENT METHOD**.



3. Enter the following information to proceed with the payment:

The screenshot shows a dark-themed interface for processing a cheque payment. At the top left is a 'Back' button. The main title is 'Cheque'. Below the title, it says 'Balance Due' followed by '90,00 €' in green. Underneath that is the instruction 'Enter the amount to pay below'. There are five input fields: 'Amount' with '90.00' entered, 'Bank' with 'Enter Bank Name', 'Cheque' with 'Enter Cheque', 'Routing' with 'Enter Routing Number', and another 'Cheque' field with 'Add Cheque'. At the bottom center is a white 'Apply Payment' button.

- Bank : Enter bank's name associated with the cheque
- Cheque: Enter cheque number
- Routing: Enter the routing number associated with the bank
- Cheque: Upload the signed cheque.

4. Click **Apply Payment**.

This screenshot is identical to the previous one, but a red rectangular box is drawn around the 'Apply Payment' button at the bottom center of the screen.

5. Click **Done** to close the sale.

The screenshot shows a 'Fiscal Receipt' screen. At the top right is a 'Done' button. Below the title, there's a 'Back' button and 'XY Connect' with a signal strength indicator. The main content is a list of receipt types with their status: 'Sale #80000032690' (READY TO PRINT), 'Receipt Receipt' (NOT PRINTED), 'Receipt Gift Receipt' (NOT PRINTED), 'Email Receipt' (NOT SENT), and 'Invoice' (NOT PRINTED). Each item has a 'View' or 'Print' icon.

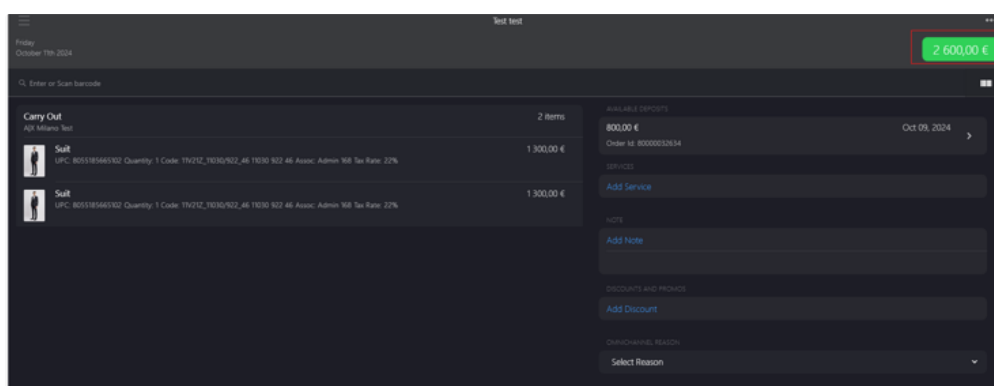
Closing Sale with Foreign Currency

Introduction

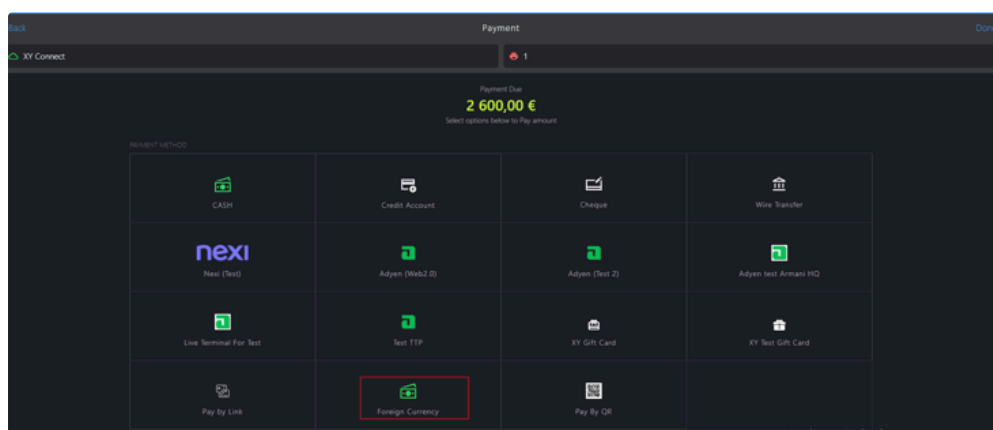
This topic explains the procedure for closing a sale with foreign currency.

Steps to Close a Sale with Foreign Currency

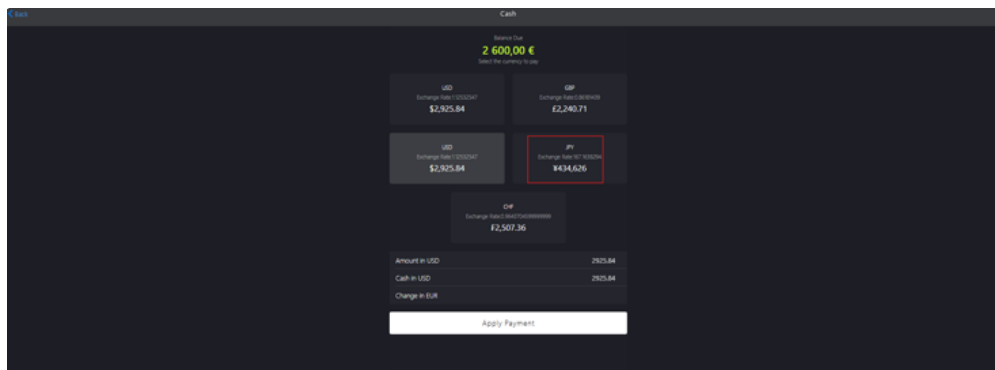
1. Click the green button.



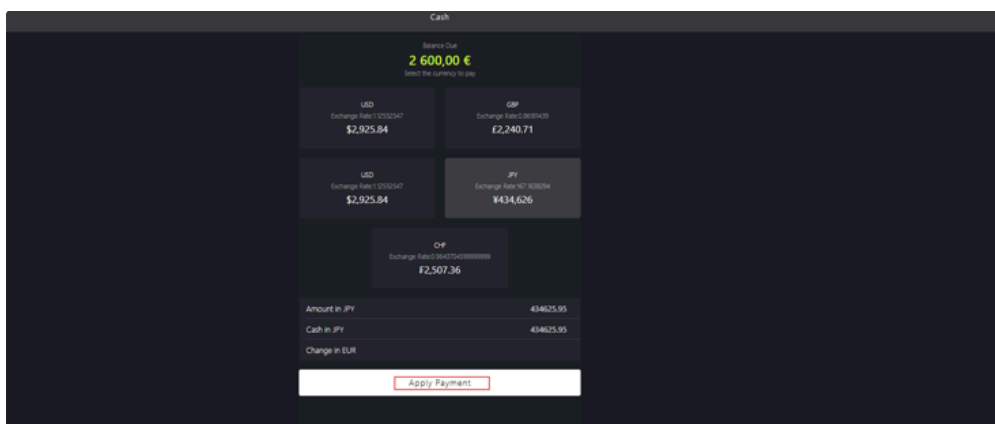
2. Select **Foreign Currency** from the **PAYMENT METHOD**.



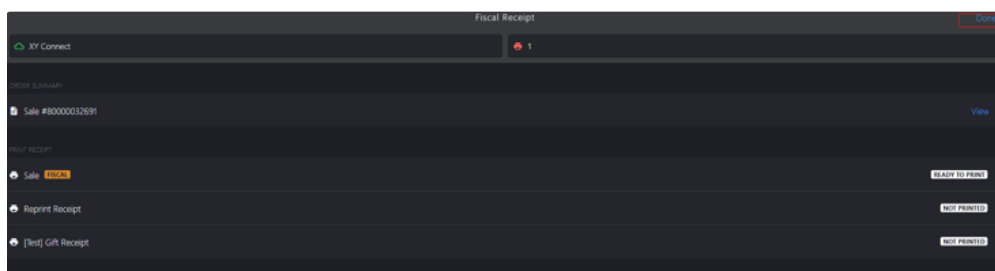
3. Select appropriate currency from the list.



4. Click **Apply Payment**.



5. Click **Done** to close the sale.



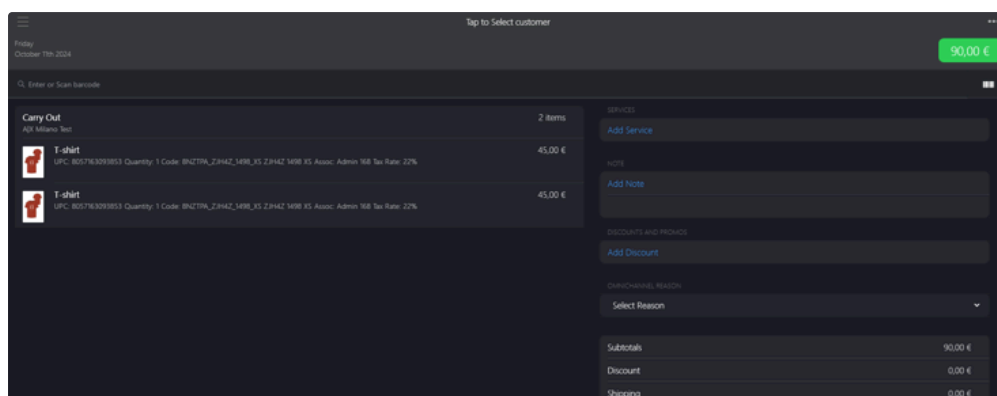
Closing Sale with Credit Amount

Introduction

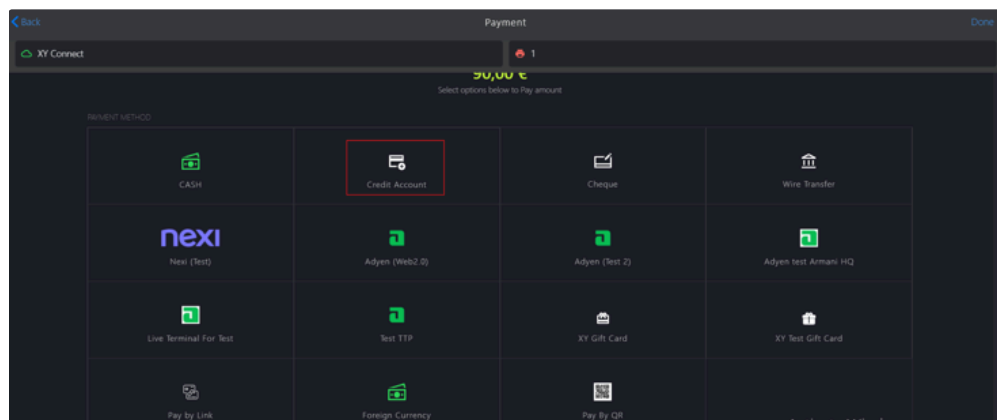
This topic explains the procedure for closing a sale with credit account, allowing customers to defer the payment for the purchased product for a specific period.

Steps to Close a Sale with Credit Account

1. Click the green button.



2. Select **Credit Account** from the **PAYMENT METHOD**.



3. Click **Apply**.

Back Credit Account

Balance Due
90,00 €
Enter the amount to pay below

Amount 90.00

Apply

4. Click **Done** to close the sale.

Fiscal Receipt Done

XY Connect 1

ORDER SUMMARY

Sale #80000032694 View

PRINT RECEIPT

Sale FISCAL	READY TO PRINT
Reprint Receipt	NOT PRINTED
[Test] Gift Receipt	NOT PRINTED

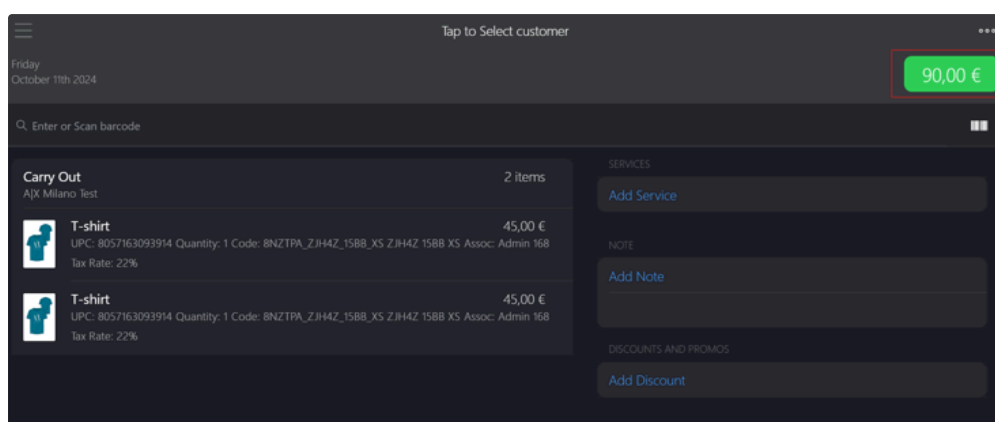
Closing Sale with Gift Card

Introduction

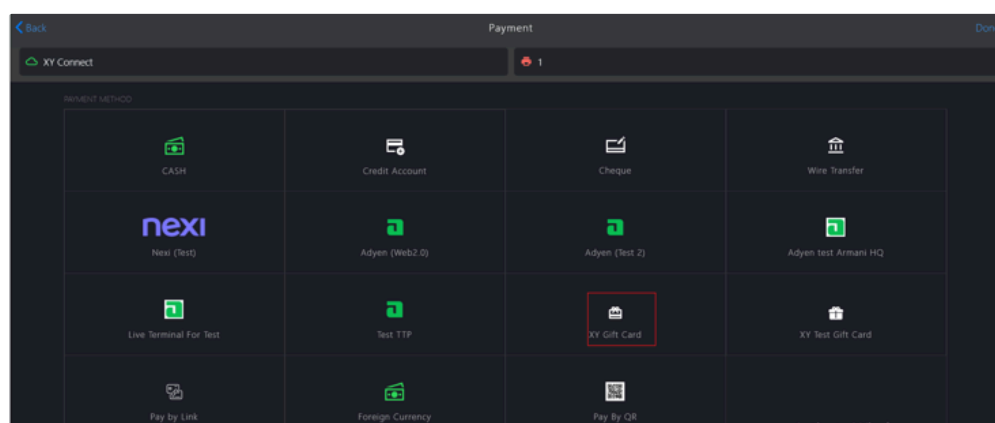
This topic explains the procedure for closing a sale with gift card.

Steps to Close a Sale with Gift Card

1. Click the green button.



2. Select **Gift Card** from **PAYMENT METHOD**.



3. Enter the following gift card information:

The screenshot shows the 'XY Gift Card' payment interface. At the top, it displays 'Balance Due' as '90,00 €' with the instruction 'Enter the amount to pay below'. Below this is a visual representation of a gift card with fields for 'Gift Card Number' (XXXX XXXX XXXX XXXX) and 'Expiration' (XX/XX). Underneath is a form with fields for 'Name' (XXXX XXX), 'Gift Card Number*' (XXXX XXXX XXXX XXXX), 'Expiration* (MM/YY)' (XXXX), and 'Security Code' (985). At the bottom, the 'Amount' is '90,00' and there is a 'Pay' button.

- Name** : Enter the gift card holder's name.
- Gift Card Number**: Enter the card number.
- Expiration**: Enter the card's expiration date in MM/YY format.
- Security Code**: Enter the security code associated with the card.

4. Click **Pay** to proceed with the payment.

This screenshot shows the same 'XY Gift Card' payment interface as the previous one, but with the 'Pay' button highlighted by a red box. The form fields are now populated with example data: 'Name' is 'RJT', 'Gift Card Number*' is '1234 5589 6989 67', 'Expiration* (MM/YY)' is '12/12', and 'Security Code' is '985'. The 'Amount' remains '90,00'.

5. Click **Done** to close the sale.

Customer Profile Registration

Customer profile registration in the Point of Sale (POS) system is a process involving capturing and storing following relevant information:

- [Customer Profile Details](#)
- [Customer Address](#)
- [Customer Tax Profile](#)
- [Marketing Permissions, Contact Preferences, and Customer Signature](#)

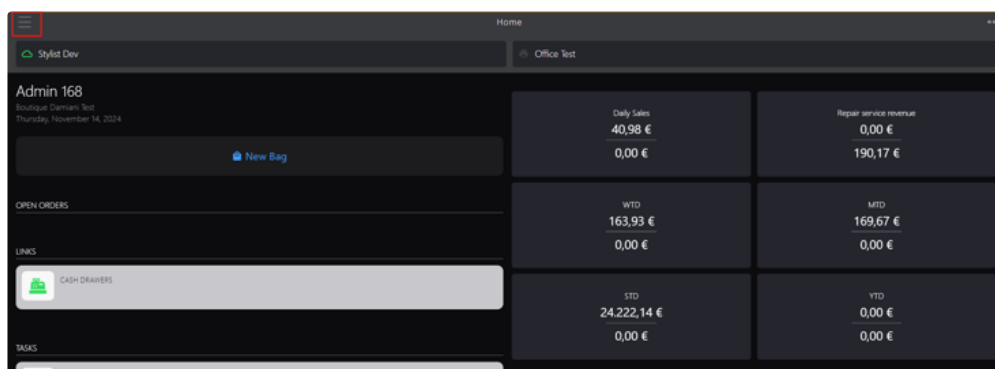
Creating a New Customer Profile

Introduction

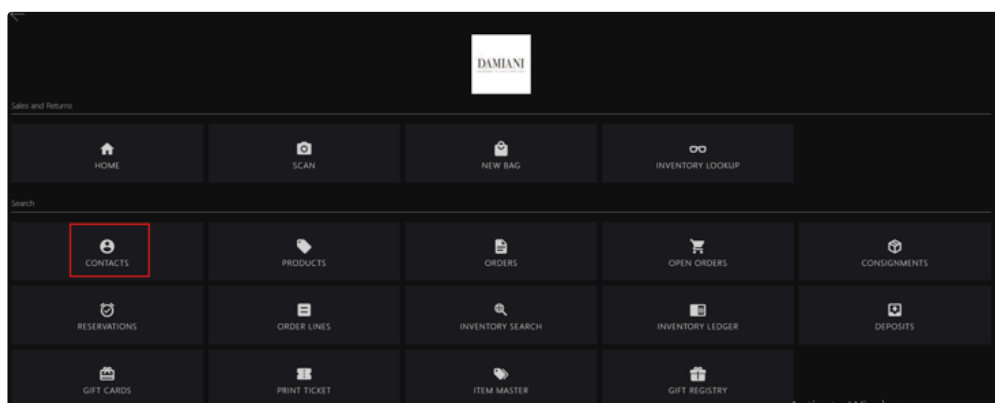
This topic explains the procedure for creating a new profile for a customer.

Steps to Create a New Customer Profile

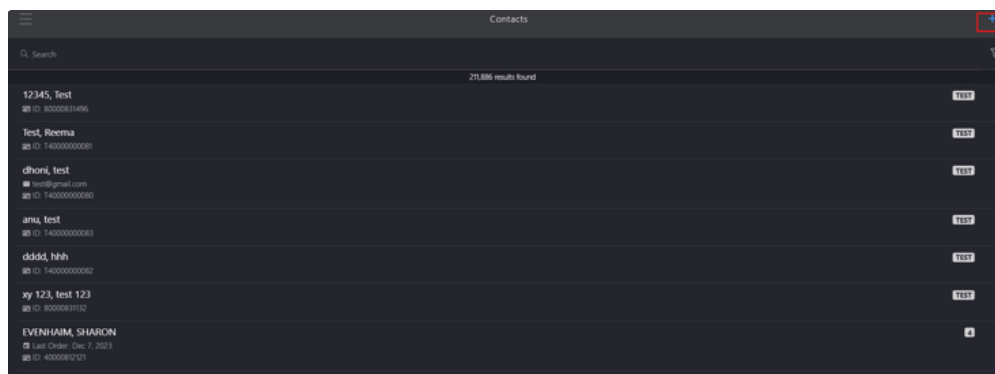
1. Click the burger menu.



2. Click **Contacts**.



3. Click the Add icon.



4. Select **Customer Type** from dropdown list:

The screenshot shows the 'BASIC CUSTOMER INFORMATION' form. The 'Customer Type' dropdown is highlighted with a red box and is set to 'Individual'. Other fields include Prefix (*), First Name (*), Last Name (*), Country, Phone Number, Secondary Phone Number, Email, Gender, Age (*), and Age Range (*). A 'Save' button is at the bottom.

Customer Type	Individual
Prefix *	Mr
First Name *	Amith
Last Name *	Test
Country	Zimbabwe
Phone Number	+263 77 123 4567
Secondary Phone Number	+263 71 234 5678
Email	amith.test@gmail.com
Gender	Male
Age *	Age Range
Age Range *	35-44

a. **Individual**

b. **Business**

5. Enter customer details:

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	Amith	
Last Name *	Test	
Country	Zimbabwe	▼
Phone Number	+263 77 123 4567	
Secondary Phone Number	+263 71 234 5678	
Email	amith.test@gmail.com	
Gender	Male	▼
Age *	Age Range	▼
Age Range *	35-44	▼

Save

Act
Go t

- Prefix*:** Select the appropriate title from **Select Prefix** dropdown list.
 - First Name*:** Enter the customer's first name.
 - Last Name*:** Enter the customer's last name.
6. **Country*:** Select the customer's country from dropdown list.

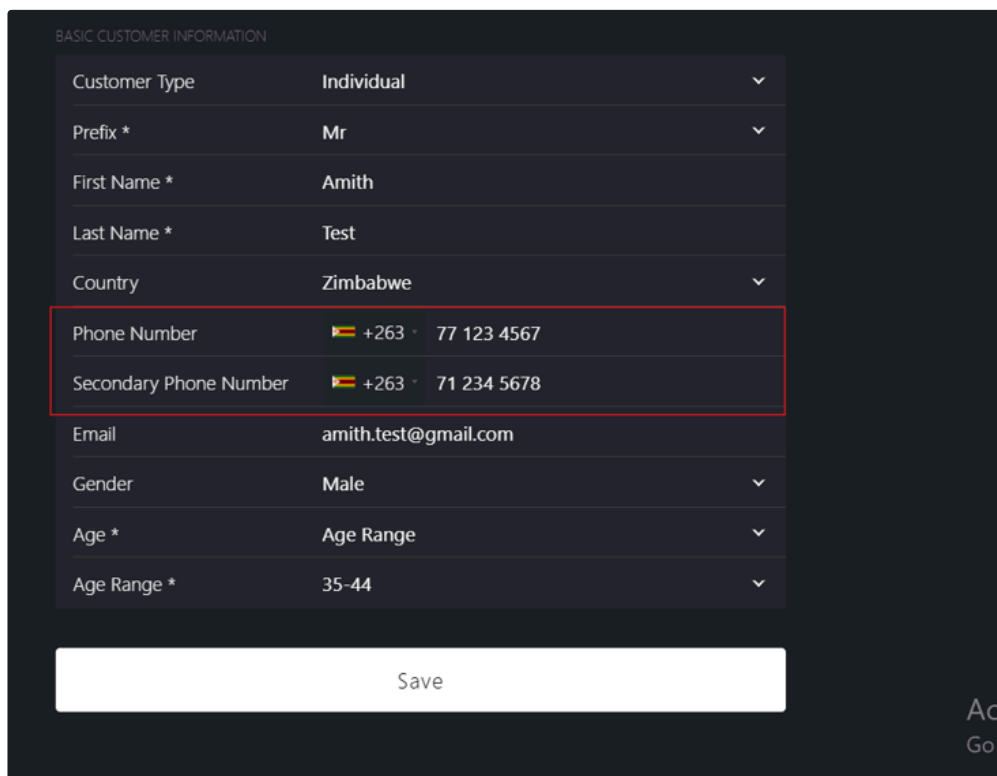
BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	Amith	
Last Name *	Test	
Country	Zimbabwe	▼
Phone Number	+263 77 123 4567	
Secondary Phone Number	+263 71 234 5678	
Email	amith.test@gmail.com	
Gender	Male	▼
Age *	Age Range	▼
Age Range *	35-44	▼



Save

Act
Go t

7. Enter phone number:



The screenshot shows a dark-themed form titled "BASIC CUSTOMER INFORMATION". The form contains several fields with dropdown menus. The "Phone Number" and "Secondary Phone Number" fields are highlighted with a red rectangular box. The "Phone Number" field shows a flag icon for Zimbabwe, a plus sign, the country code "+263", and the number "77 123 4567". The "Secondary Phone Number" field shows the same flag icon, plus sign, and country code "+263", followed by the number "71 234 5678". Other fields include "Customer Type" (Individual), "Prefix *" (Mr), "First Name *" (Amith), "Last Name *" (Test), "Country" (Zimbabwe), "Email" (amith.test@gmail.com), "Gender" (Male), "Age *" (Age Range), and "Age Range *" (35-44). A "Save" button is located at the bottom of the form. In the bottom right corner, there are partially visible buttons labeled "Act" and "Go t".

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	Amith	
Last Name *	Test	
Country	Zimbabwe	▼
Phone Number	 +263 · 77 123 4567	
Secondary Phone Number	 +263 · 71 234 5678	
Email	amith.test@gmail.com	
Gender	Male	▼
Age *	Age Range	▼
Age Range *	35-44	▼

Save

Act
Go t

a. **Phone Number:** Select country code from dropdown list and enter the primary contact number.

b. **Secondary Phone Number (Optional):** Select country code from dropdown list and enter the secondary contact number.

8. **Email:** Enter the customer email address.

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	Amith	
Last Name *	Test	
Country	Zimbabwe	▼
Phone Number	+263 77 123 4567	
Secondary Phone Number	+263 71 234 5678	
Email	amith.test@gmail.com	
Gender	Male	▼
Age *	Age Range	▼
Age Range *	35-44	▼

Save

Act
Go t

9. **Gender:** Select gender from dropdown list.

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	Amith	
Last Name *	Test	
Country	Zimbabwe	▼
Phone Number	+263 77 123 4567	
Secondary Phone Number	+263 71 234 5678	
Email	amith.test@gmail.com	
Gender	Male	▼
Age *	Age Range	▼
Age Range *	35-44	▼

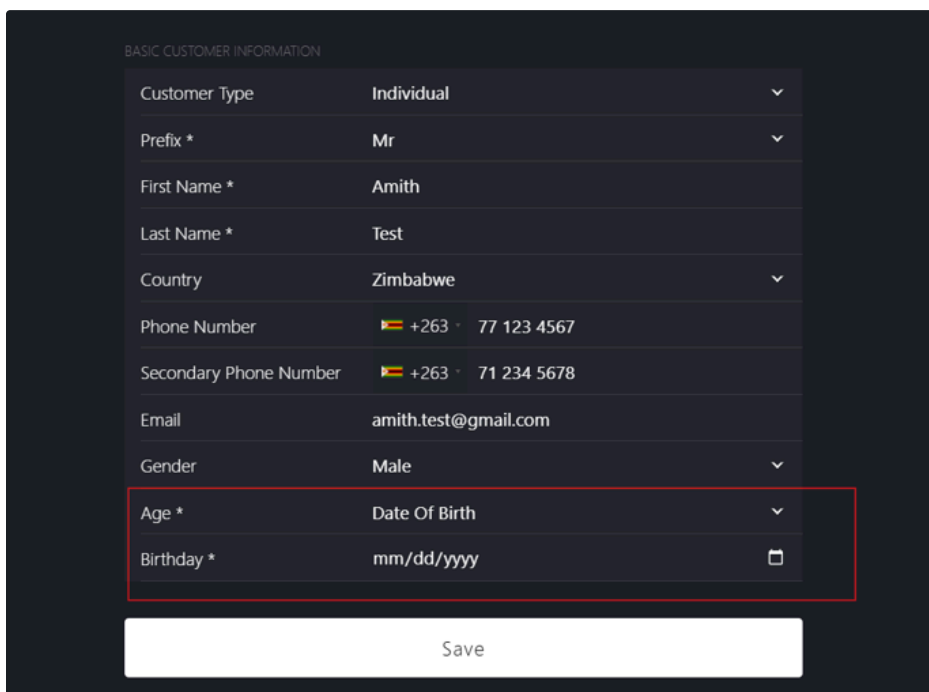
Save

Act
Go t

10. Select **Age*** type from dropdown list:

a. Date of Birth:

- i. **Birthday***: Enter the customer's date of birth manually using calendar icon in mm/dd/yyyy format.



BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	Amith	
Last Name *	Test	
Country	Zimbabwe	▼
Phone Number	+263 · 77 123 4567	
Secondary Phone Number	+263 · 71 234 5678	
Email	amith.test@gmail.com	
Gender	Male	▼
Age *	Date Of Birth	▼
Birthday *	mm/dd/yyyy	📅

Save

b. Age Range:

- i. **Age Range***: Select the customer's age range from the dropdown list.

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	Amith	
Last Name *	Test	
Country	Zimbabwe	▼
Phone Number	+263 · 77 123 4567	
Secondary Phone Number	+263 · 71 234 5678	
Email	amith.test@gmail.com	
Gender	Male	▼
Age *	Age Range	▼
Age Range *	35-44	▼

Save

Act
Go t

11. Click **Save** to complete the customer profile creation and navigate to **Customer Address** page.

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	Amith	
Last Name *	Test	
Country	Zimbabwe	▼
Phone Number	+263 · 77 123 4567	
Secondary Phone Number	+263 · 71 234 5678	
Email	amith.test@gmail.com	
Gender	Male	▼
Age *	Date Of Birth	▼
Birthday *	mm/dd/yyyy	📅

Save

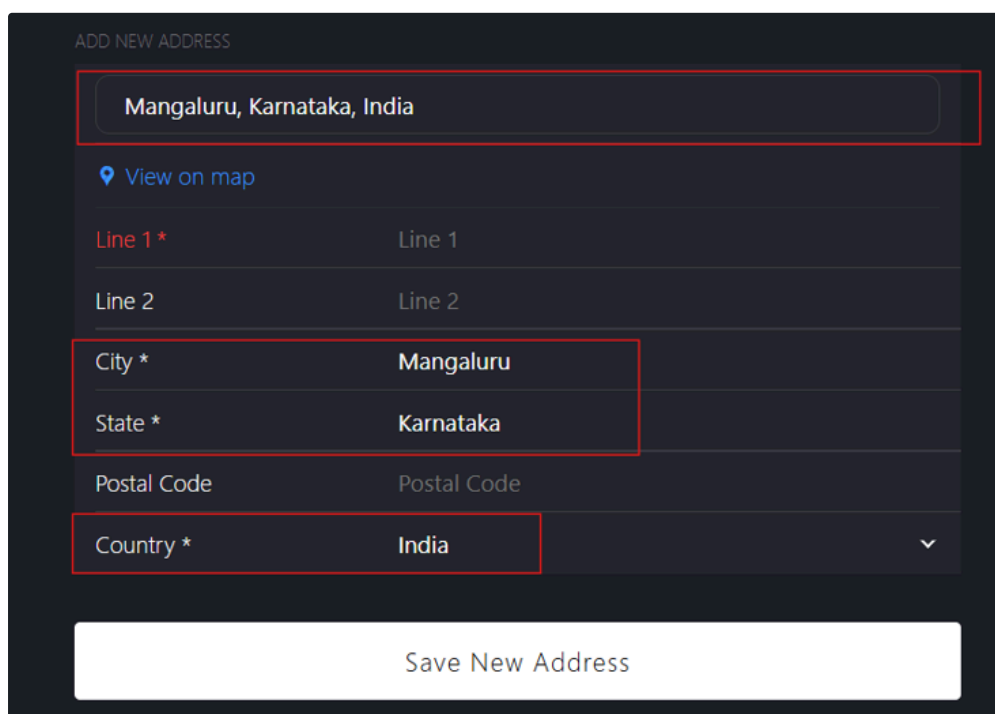
Creating a New Address

Introduction

This topic explains the procedure for adding customer's address, after saving the customer profile.

Steps to Create a New Address

1. If the city, state or country of customer address exists, use the search box to auto-fill respective **ADD NEW ADDRESS** section fields (optional).



The screenshot displays the 'ADD NEW ADDRESS' form with the following fields and values:

Field	Value
Search Box	Mangaluru, Karnataka, India
View on map	View on map
Line 1 *	Line 1
Line 2	Line 2
City *	Mangaluru
State *	Karnataka
Postal Code	Postal Code
Country *	India

At the bottom of the form is a button labeled "Save New Address".

Note: Click **View on map** to display satellite view of the provided address.

2. Enter the address Information in the following fields:

Search address

Line 1 *	Line 1
Line 2	Line 2
City *	City
State *	State
Postal Code	Postal Code
Country *	Select country ▼

Save New Address

- a. **Line 1***: Enter the primary address details, such as house number, street name and number.
 - b. **Line 2**: Enter the additional address details (optional).
 - c. **City***: Enter the city name.
 - d. **State***: Enter the state name.
 - e. **Postal Code**: Enter the postal code.
 - f. **Country***: Select the country from the dropdown list.
3. Click **Save New Address** to save the address.

Search address

Line 1 * Line 1

Line 2 Line 2

City * City

State * State

Postal Code Postal Code

Country * Select country

Save New Address

4. Click **Next** to go to **TAX Profile**.

Back Customer Address Next

BILL TO ADDRESS

amish.toni@gmail.com
+262 77 33 4567
111 Makana Drive, Acaoude, Harare, ZW, 30709

ADD NEW ADDRESS

Search address

Line 1 * Line 1

Line 2 Line 2

City * City

State * State

Postal Code Postal Code

Country * Select country

Save New Address

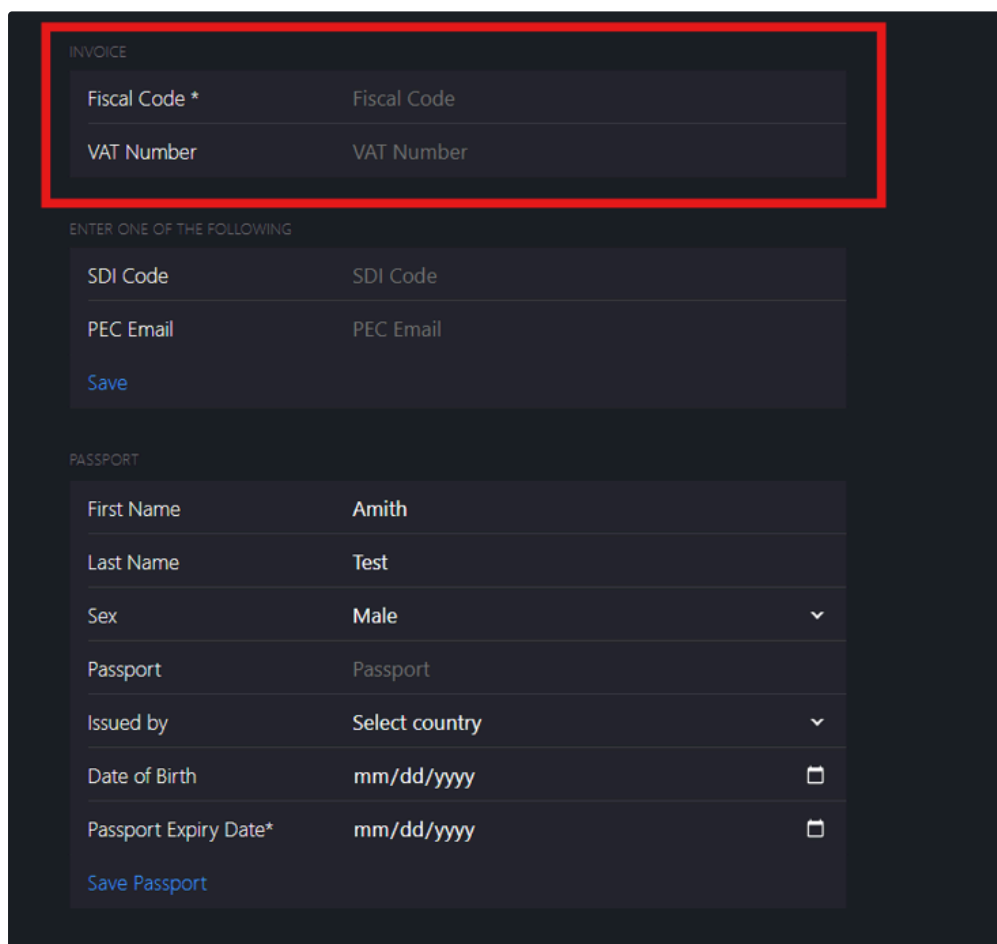
Creating a New Tax Profile

Introduction

This topic explains the procedure for adding a new tax profile to the new customer.

Steps to Create a New Tax Profile

1. Enter the following information in the **INVOICE** fields:



The screenshot shows a dark-themed form with three sections: INVOICE, ENTER ONE OF THE FOLLOWING, and PASSPORT. The INVOICE section is highlighted with a red border and contains two rows of input fields: 'Fiscal Code *' and 'Fiscal Code', and 'VAT Number' and 'VAT Number'. The ENTER ONE OF THE FOLLOWING section contains 'SDI Code' and 'SDI Code', 'PEC Email' and 'PEC Email', and a 'Save' button. The PASSPORT section contains 'First Name' (Amith), 'Last Name' (Test), 'Sex' (Male), 'Passport' (Passport), 'Issued by' (Select country), 'Date of Birth' (mm/dd/yyyy), 'Passport Expiry Date*' (mm/dd/yyyy), and a 'Save Passport' button.

- a. **Fiscal Code***: Enter the fiscal code.
- b. **VAT Number**: Enter the VAT number.

2. Enter one of the following information in the **ENTER ONE OF THE FOLLOWING** fields:

INVOICE

Fiscal Code *	Fiscal Code
VAT Number	VAT Number

ENTER ONE OF THE FOLLOWING

SDI Code	SDI Code
PEC Email	PEC Email

Save

PASSPORT

First Name	Amith	
Last Name	Test	
Sex	Male	▼
Passport	Passport	
Issued by	Select country	▼
Date of Birth	mm/dd/yyyy	📅
Passport Expiry Date*	mm/dd/yyyy	📅

Save Passport

- a. **SDI code:** Enter an **SDI code**.
- b. **PEC Email:** Enter a **PEC Email**.

Note: SDI code applies to individuals or businesses registered with Italian Tax System who receives electronic invoices via Sistema di Interscambio (SDI). If the customer does not have an SDI code, they can use PEC Email. PEC Email is an alternate method for receiving electronic invoices.

3. Click **Save**.

INVOICE

Fiscal Code *	Fiscal Code
VAT Number	VAT Number

ENTER ONE OF THE FOLLOWING

SDI Code	SDI Code
PEC Email	PEC Email

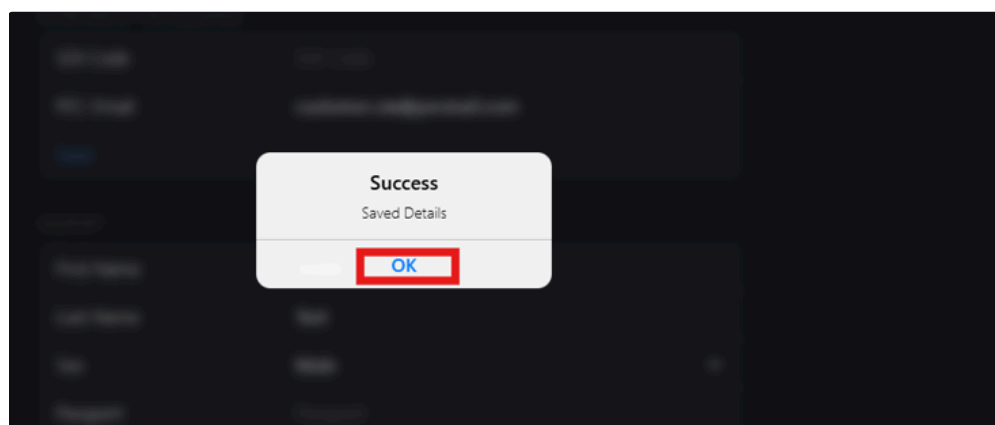
Save

PASSPORT

First Name	Amith	
Last Name	Test	
Sex	Male	▼
Passport	Passport	
Issued by	Select country	▼
Date of Birth	mm/dd/yyyy	📅
Passport Expiry Date*	mm/dd/yyyy	📅

[Save Passport](#)

4. Click **OK** on the dialog box to save the SDI code or PEC email details.



5. Enter the following information in the **PASSPORT** fields:

INVOICE

Fiscal Code *	Fiscal Code
VAT Number	VAT Number

ENTER ONE OF THE FOLLOWING

SDI Code	SDI Code
PEC Email	PEC Email

[Save](#)

PASSPORT

First Name	Amith	
Last Name	Test	
Sex	Male	▼
Passport	Passport	
Issued by	Select country	▼
Date of Birth	mm/dd/yyyy	📅
Passport Expiry Date*	mm/dd/yyyy	📅

[Save Passport](#)

- a. **Passport:** Enter the passport number
 - b. **Issued by:** Select the country from dropdown list.
 - c. **Date of Birth:** Enter the date of birth in mm/dd/yy format.
 - d. **Passport Expiry Date*:** Enter the expiry date in mm/dd/yy format.
6. Click **Save Passport**.

INVOICE

Fiscal Code *	Fiscal Code
VAT Number	VAT Number

ENTER ONE OF THE FOLLOWING

SDI Code	SDI Code
PEC Email	PEC Email

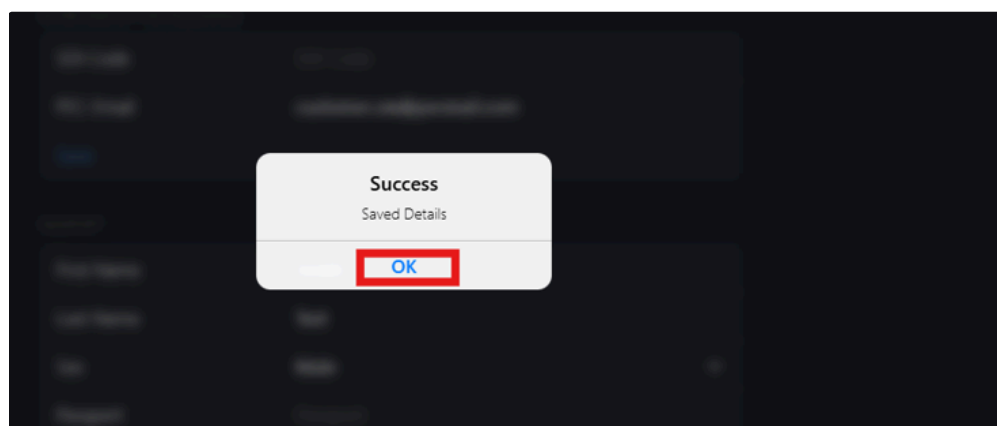
Save

PASSPORT

First Name	Amith	
Last Name	Test	
Sex	Male	▼
Passport	Passport	
Issued by	Select country	▼
Date of Birth	mm/dd/yyyy	📅
Passport Expiry Date*	mm/dd/yyyy	📅

Save Passport

7. Click **OK** on the dialog box to save the passport details.



8. Click **Next** to go to **Customer Profile** page.

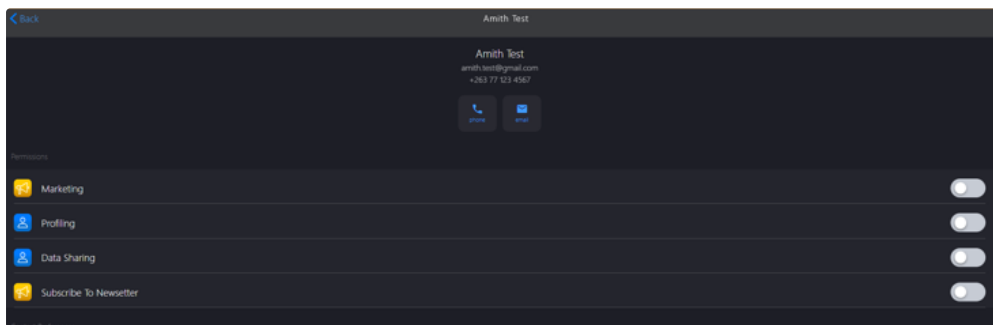
Configuring Marketing Permissions, Contact Preferences, and Customer Signature to Customer Profile

Introduction

This topic explains the procedure for adding marketing permissions, contact preferences and customer signature to the customer profile.

Steps to Add Marketing Permissions, Contact Preferences, and Customer Signature to Customer Profile

1. Click the toggle button in the **Permissions** section to activate (blue) only if the customer agrees to the following options:



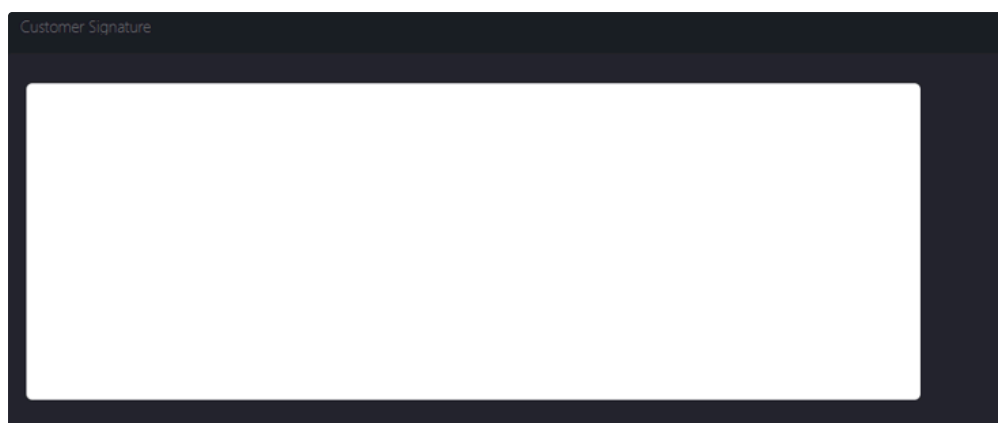
- a. **Marketing**
- b. **Profiling**
- c. **Data Sharing**
- d. **Subscribe to Newsletter**

2. Click the toggle button in the **Contact Preferences** section to activate (blue) only if the customer agrees for the following options:



- a. **Phone:**
- b. **Email**
- c. **Facetime**
- d. **Messages**
- e. **Whatsapp**
- f. **Wechat**
- g. **Signal**

3. Customer need to type the signature in the **Customer Signature** field.



A screenshot of a dark-themed interface showing a large, empty white rectangular box for entering a signature. The text "Customer Signature" is visible in the top left corner of the dark area.

4. Click the **Agree To GDPR** toggle button to accept GDPR compliance.



A screenshot of the same dark-themed interface. The signature box is now smaller and positioned on the left side. To its right, there is a toggle switch labeled "Agree To GDPR" which is currently turned off. Below the toggle are two buttons: "Save" and "Clear Signature". A red rectangular box highlights the "Agree To GDPR" toggle.

5. Click **Save** to save the signature.



6. Click **Clear Signature** to remove the current signature and allow the customer to type a new one.



Customer Insights

The **Customer Insights** feature serves as a central hub for monitoring and analyzing customer behavior. This feature provides a detailed overview of customers' recent purchases, frequency of the purchase in last 12 months, total amount spent in last 12 months, most purchased items, and all purchased items. Each feature category highlights different aspects of customers' purchasing behavior, providing comprehensive data to assist in tailoring the shopping experience exclusively for each customer.

- [Customer Insights Page Overview](#)
- [Accessing the Customer Insights](#)

Customer Insights Page Overview

Introduction

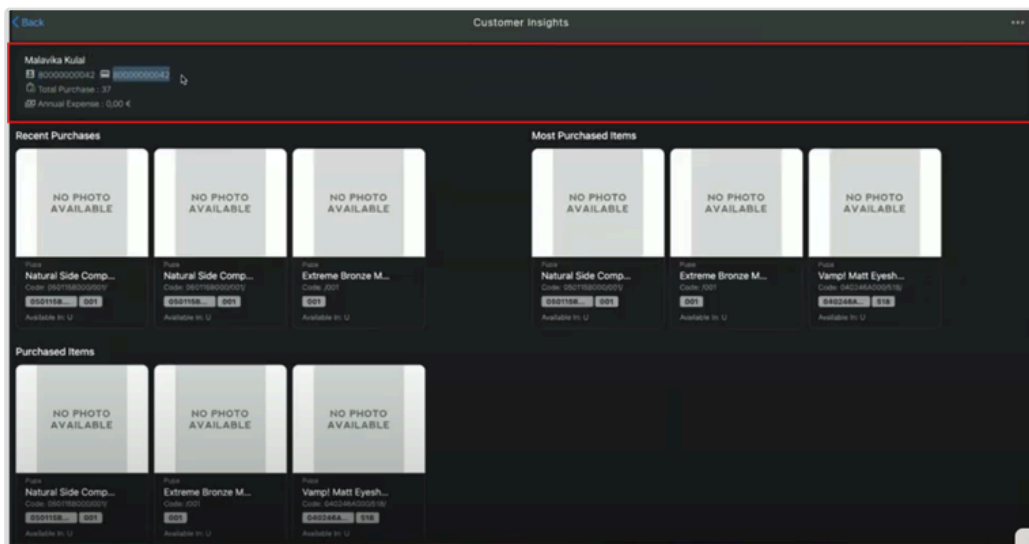
The **Customer Insights** feature page is divided into four sections, each highlighting different insights into customer purchasing behavior. The following sections are designed to help the sales associate quickly access the customer data to understand the customer's different shopping requirements and enhance the shopping experience.

1. **Customer Information**
2. **Recent Purchases**
3. **Purchased Items**
4. **Most Purchased Items**

Customer Insights Page Overview

Customer Information

The **Customer Information** section displays following essential customer information:



- **Name:** Displays the customer's full name, for example, Thomas Shelby.
- **Customer ID:** Displays a unique number assigned to the customer, for example, 80000000042.

- **Card Number:** Displays the debit or credit card details, for example, 9578545203541.
- **Total Purchase:** Displays the total number of transactions of last 12 months.
- **Annual Expense:** Displays the total expenditure of last 12 months.

- **Digital Card Number:** If a store does not have a physical card (such as a Member, Membership, or Customer Card) available at the time of registration, a Digital Card Number identical to the newly generated Customer ID will be issued. When the physical card becomes available, the customer will receive the new card, and the previously issued Digital Card number will no longer be valid.
- **Purchase and Annual Expense History:** The total frequency of the purchase and annual expense for the last 12 months is considered between the “From Date” and the “Current Date”.

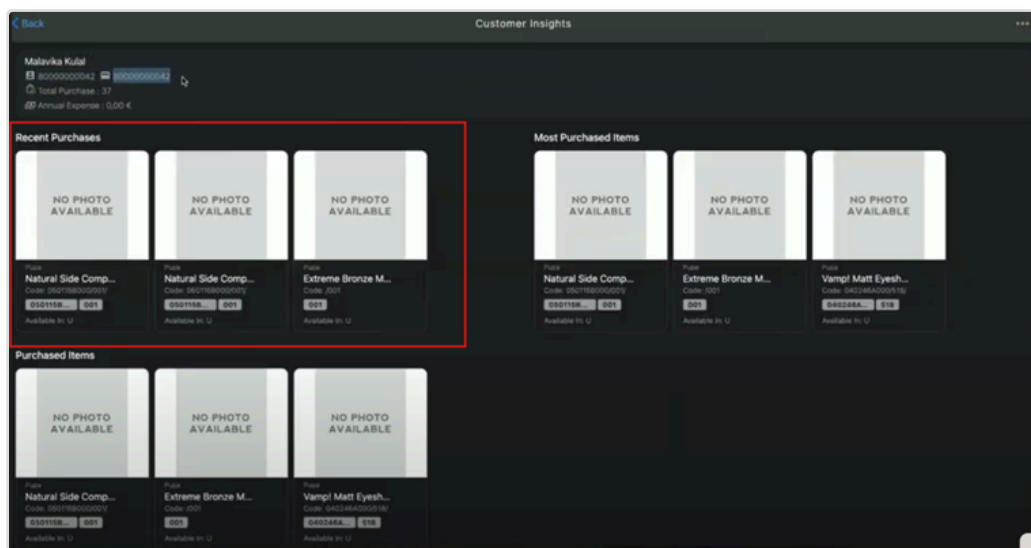
Example:

If today's date is 12 December 2024, the purchase and annual expense history will be considered from 12 December 2023 to 12 December 2024.

- The system creates the customer ID in incremental order from the previously created customer ID.

Recent Purchases

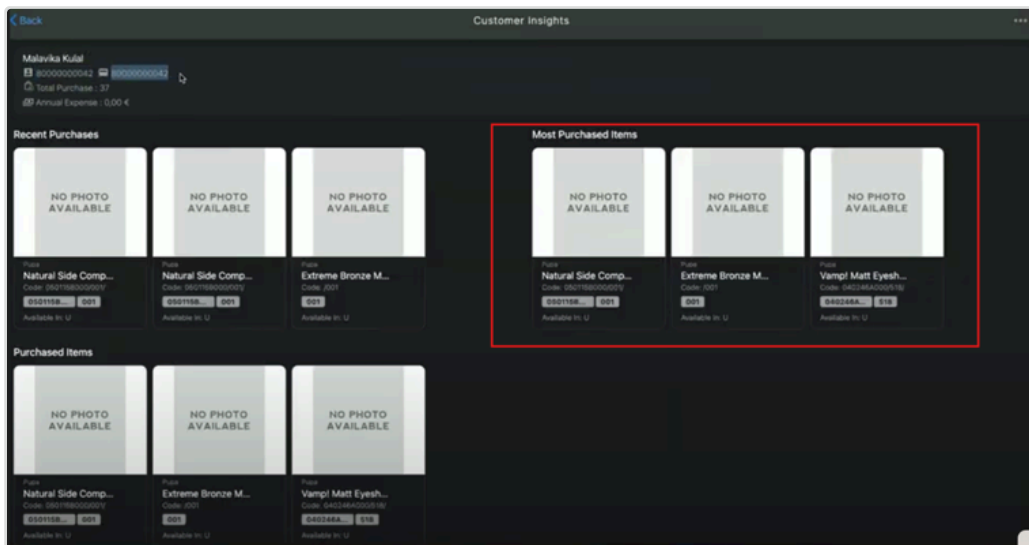
The **Recent Purchases** section displays the customer's three most recent purchases, providing a insight into customer's recent shopping activity.



The **Recent Purchases** section will not display the same item more than once if the item has been purchased multiple times in the same time frame.

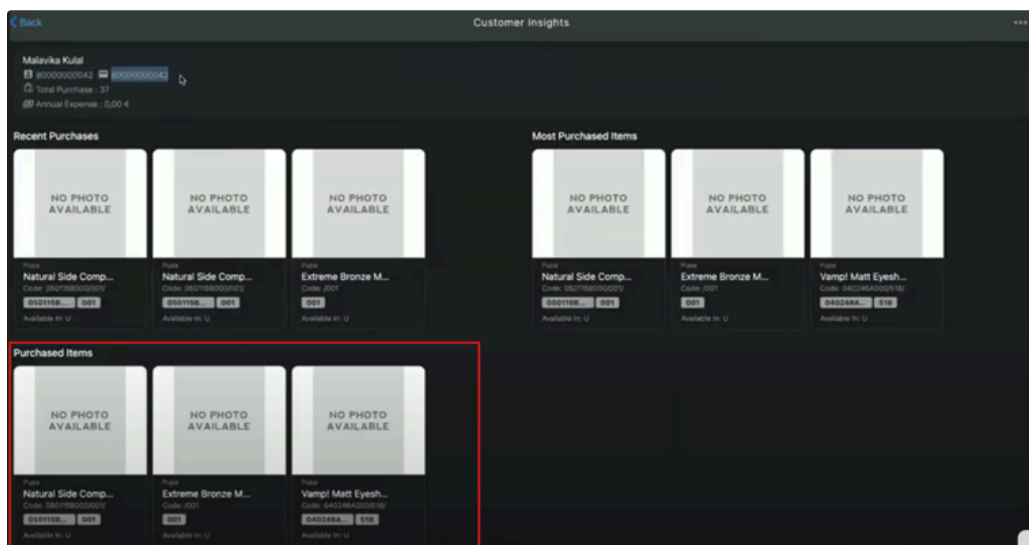
Most Purchased Items

The Most Purchased Items sections displays the customer's frequently purchased items, providing a insight into customer's preferences and helping to create personalized product suggestions.



Purchased Items

The **Purchased Items** section displays complete list of the customer's purchase history.



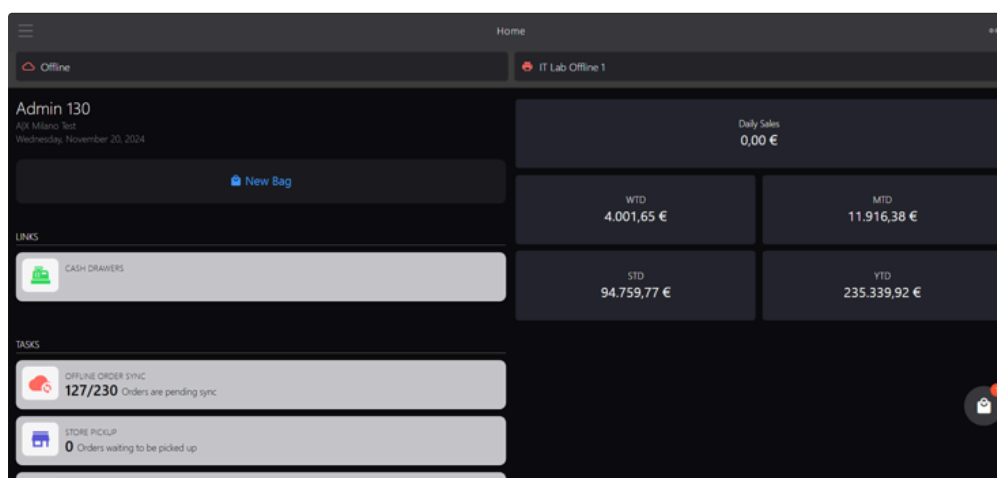
Accessing the Customer Insights

Introduction

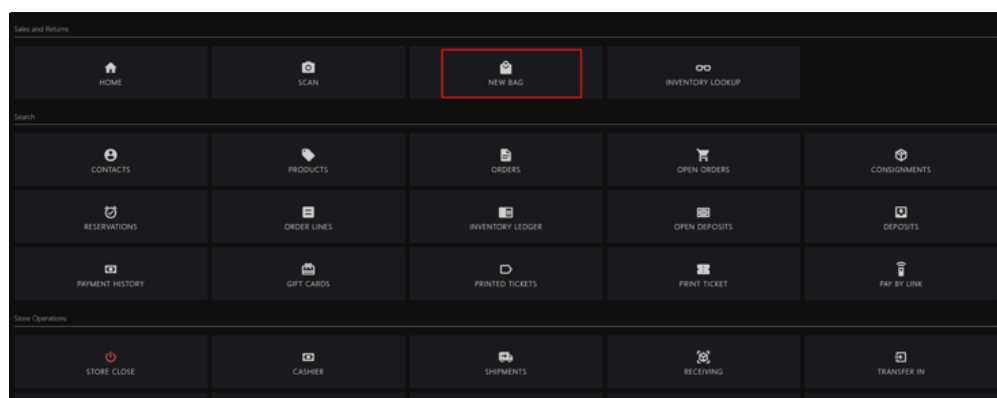
This topic explains the procedure to how to access the **Customer Insights** page.

Steps to Access Customer Insight

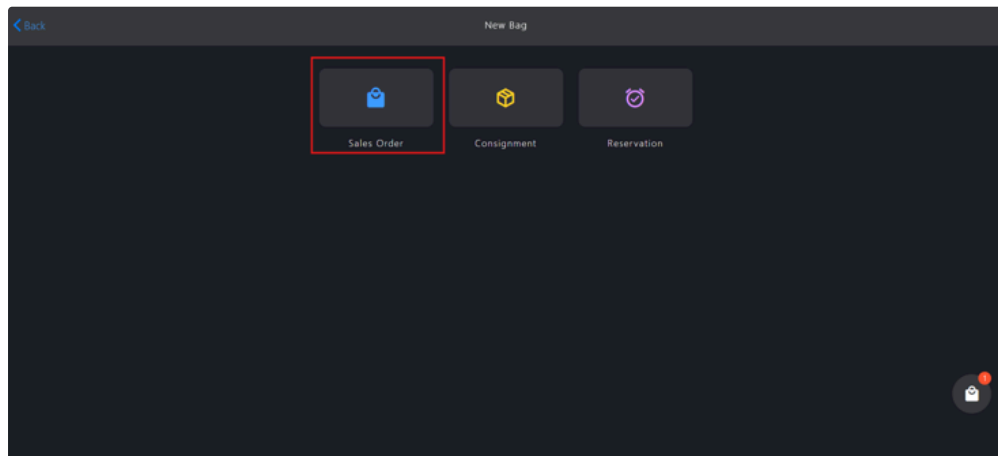
1. Click the burger menu.



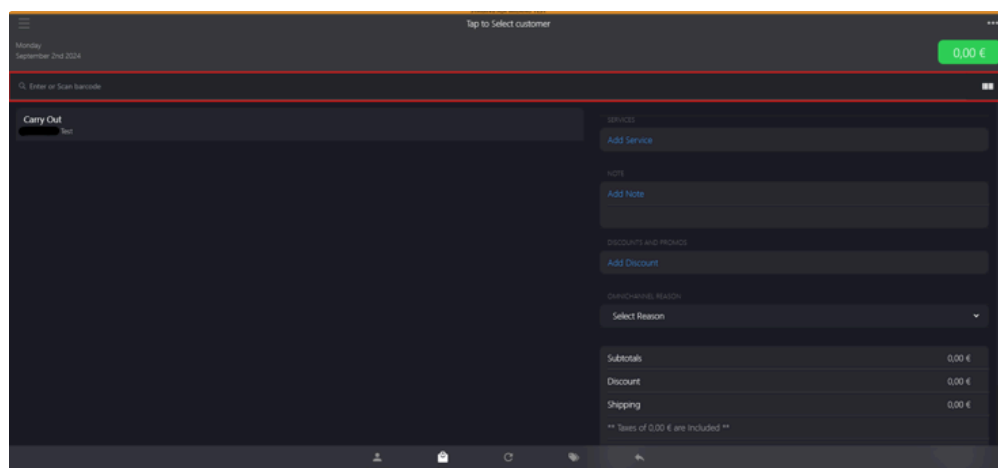
2. Click **NEW BAG**.



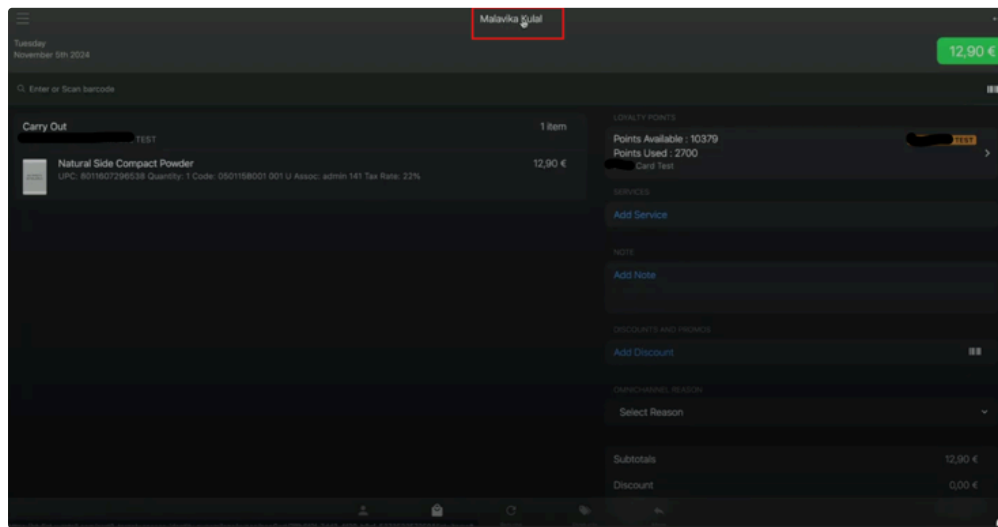
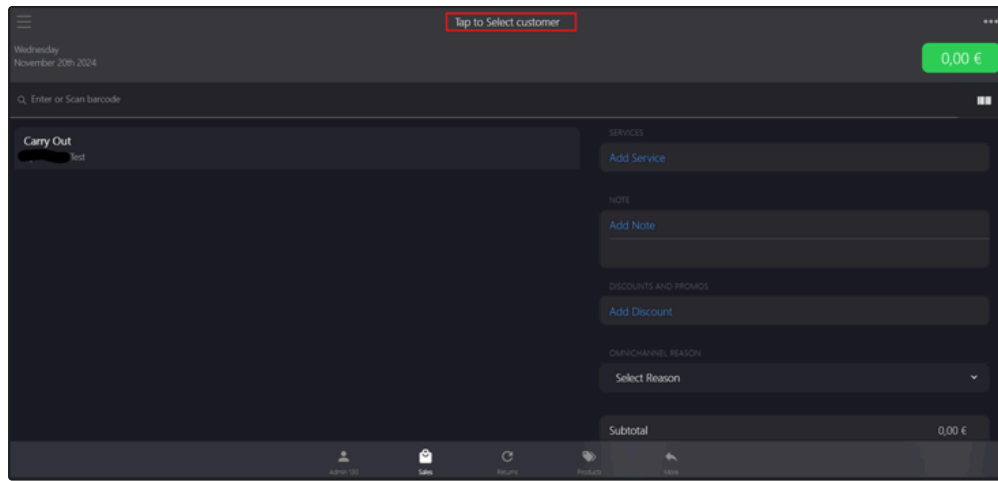
3. Click **Sales Order**.



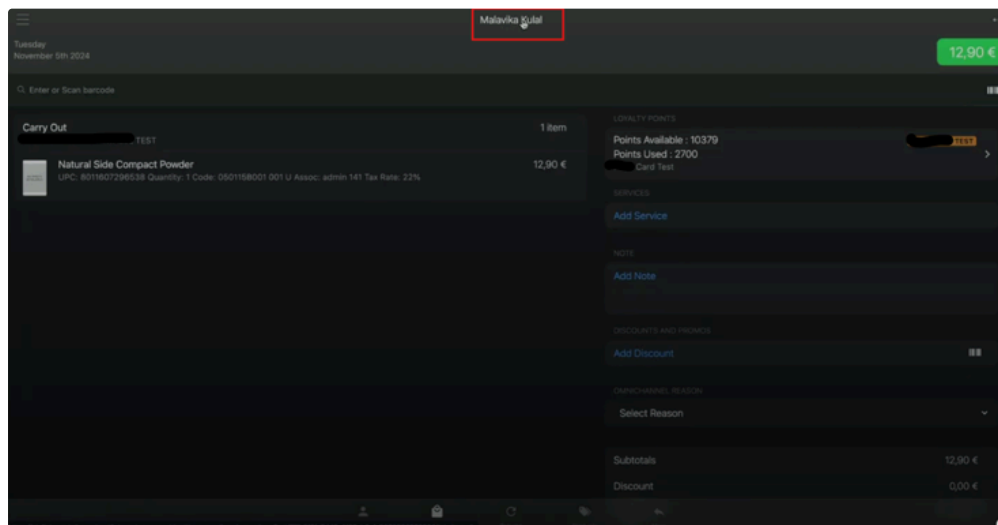
4. Go to **Enter or Scan barcode** box to add the products.



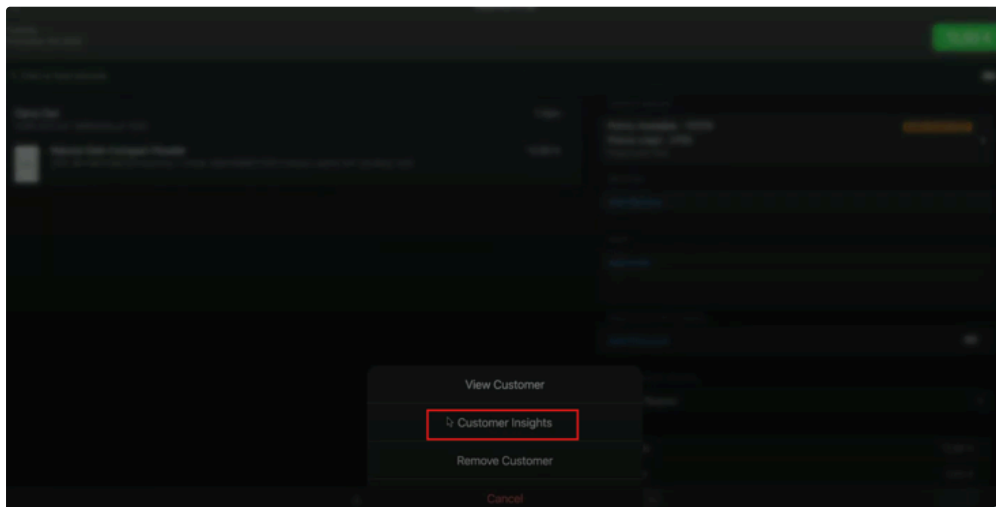
5. Click **Tap to Select customer** to add the customer.



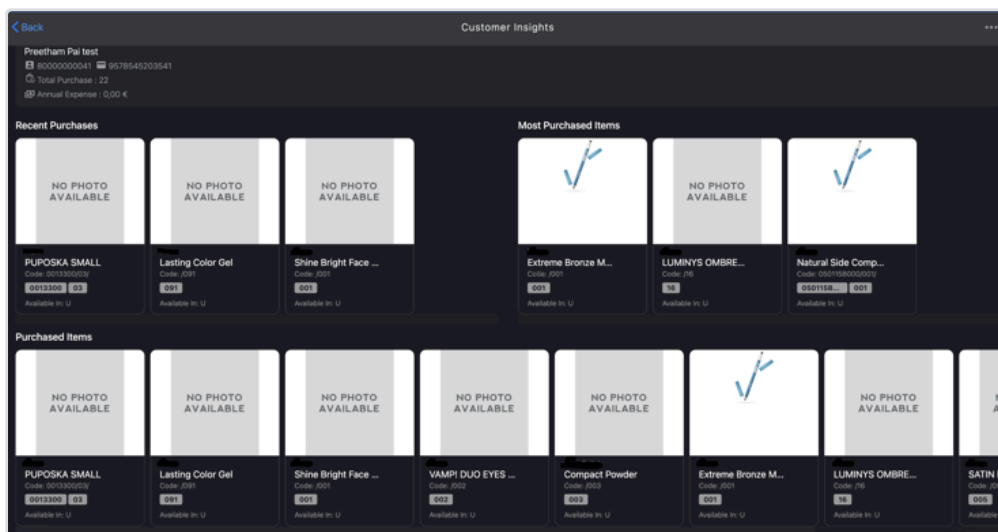
6. Click the selected customer.



7. Select **Customer Insights** in the pop-up menu.



8. The **Customer Insights** page is displayed



Shipping

Shipping is a service that retail establishments provide in partnership with courier service providers to ensure the delivery of customer orders to designated locations.

- **Chargeable Shipping:** The customer has to pay for the shipping services, in addition to the product price and any applicable taxes.
- **Free Shipping:** The customer does not have to pay for shipping services. Retailers will cover the service cost as part of promotional offers.

XY POS supports both in-store and omnichannel order shipping.

- **In-store Shipping:** Refers to shipping initiated directly from the store where a customer purchases a product in-store, and the store arranges the delivery to the customer's location.
- **Omnichannel Shipping:** Refers to shipping initiated for orders placed through multiple channels, such as online stores, or mobile applications.

- [Setting up Shipping Address](#)
- [Shipping Process: Pick, Pack, and Ship](#)
- [Managing Shipping Regions in Spaces](#)

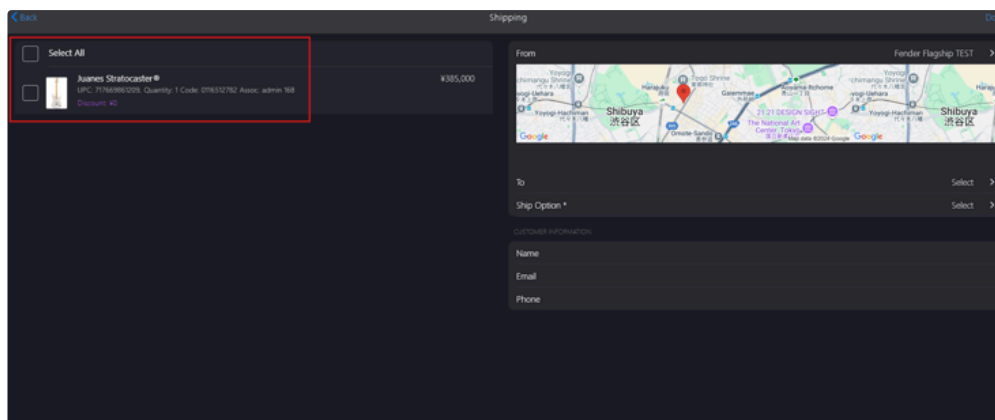
Setting up Shipping Address

Introduction

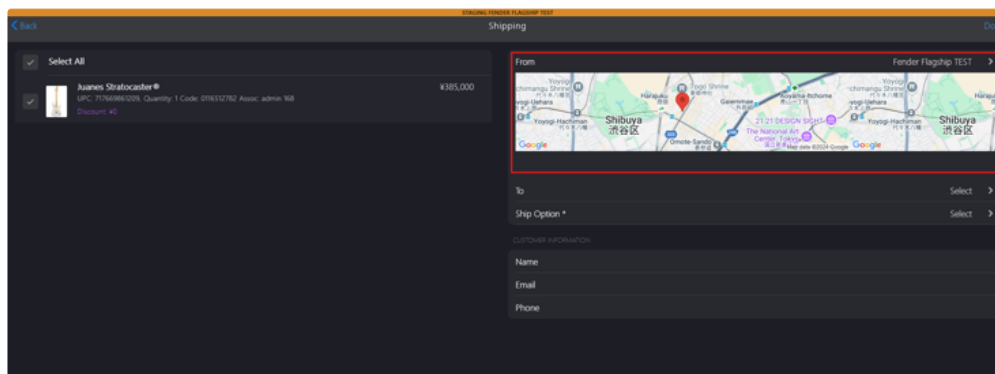
This topic explains the step-by-step procedure for adding a shipping address after an order has been confirmed during an in-store purchase.

Steps to Add Shipping Address

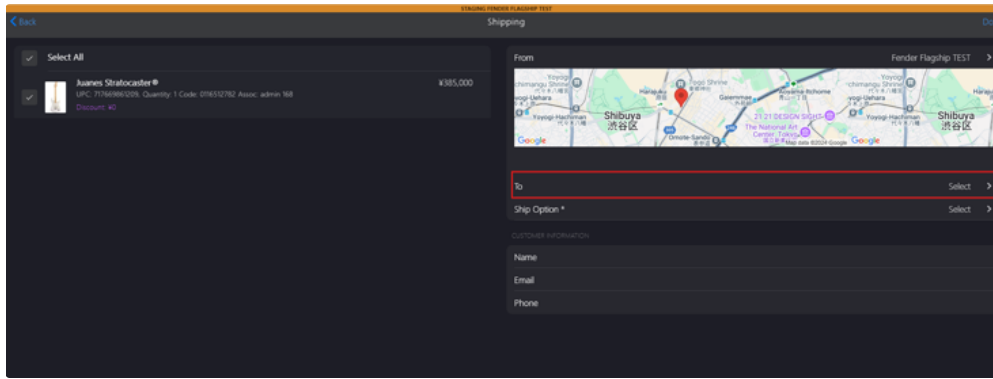
1. Click the checkbox to select the product for shipping.



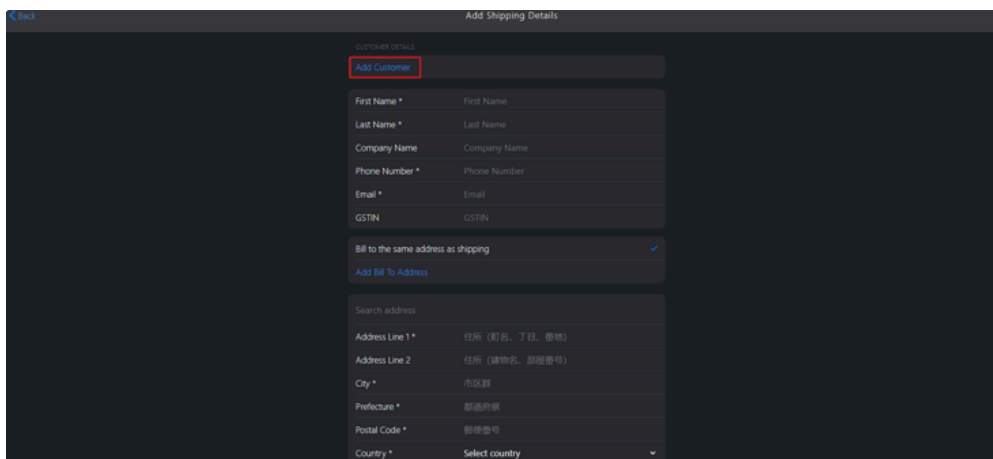
2. The system automatically selects the **From** address, which represents the store where the product was ordered.



3. Click **To** go to **Add Shipping Details** page.



4. Click **Add Customer** in **CUSTOMER DETAILS** to import the customer details from **Contacts** and automatically fill in the following fields:

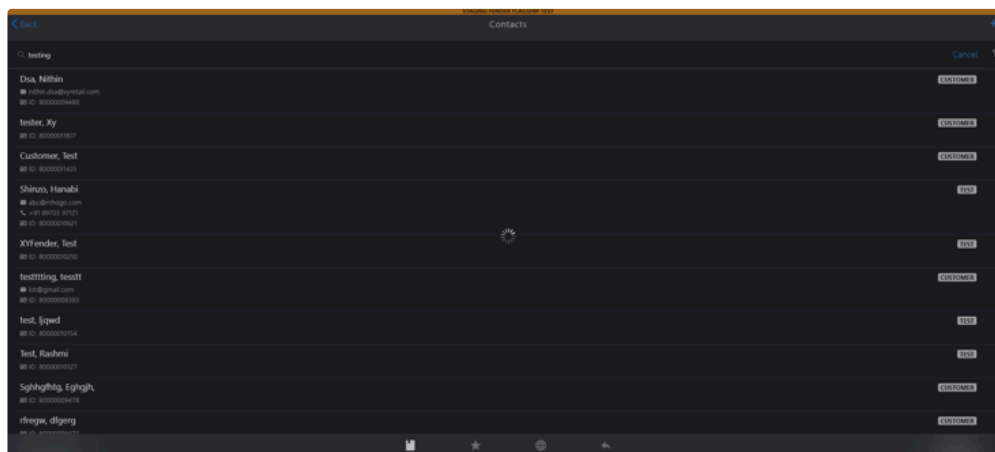


- **First Name***: Enter the customer's first name.
- **Last Name***: Enter the customer's last name.
- **Company Name**: If applicable, enter the name of the company associated with the customer.
- **Phone Number***: Enter a valid phone number.
- **Email***: Enter a valid email address.
- **GSTIN**: If applicable, enter the customer's GST Identification Number (GSTIN) for tax-related purposes.

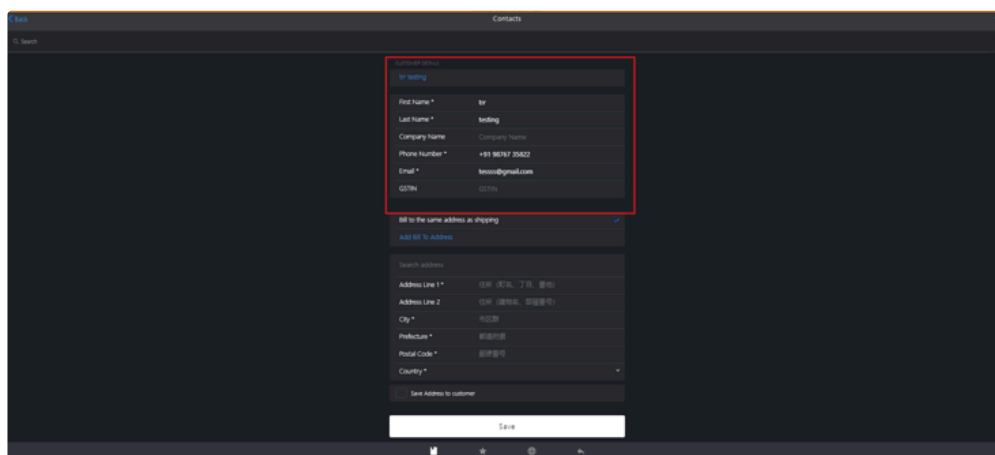
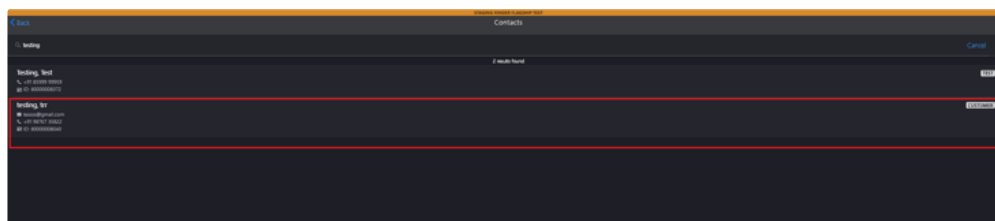
Note:

- Fields marked with * are mandatory.
- If the phone number and email are not automatically updated when importing customer data from Contacts, manually enter them.

5. Search for the customer in the **Contacts** search box.



6. Click to select the customer from the search list and complete the customer details.



7. Enter the following **Add Bill to Address** fields to deliver the order to customer's specified location:

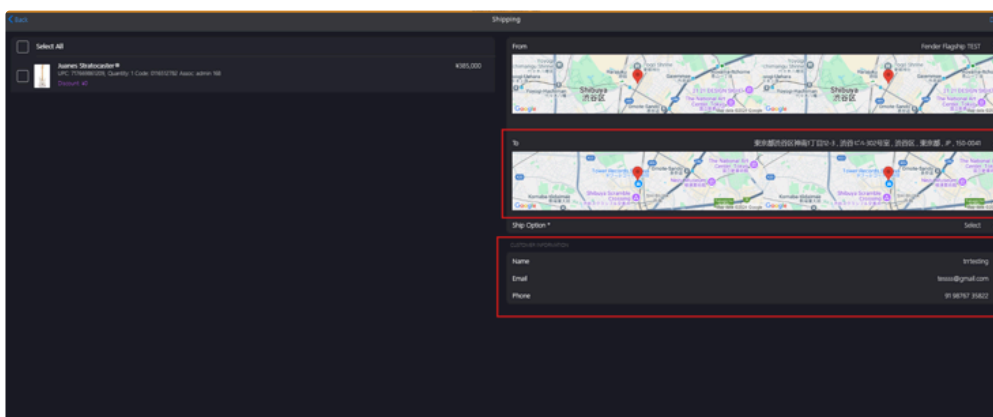
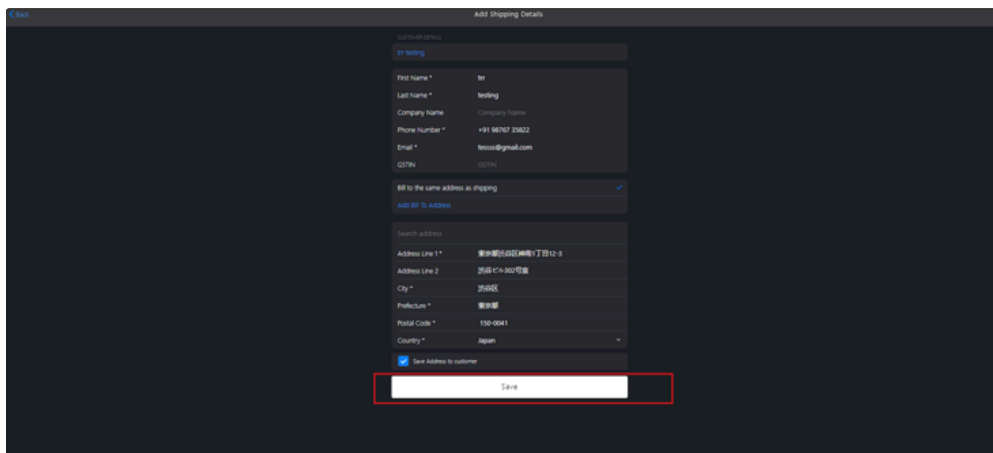
- **Address Line 1***: Enter the street address, including block and building details.
- **Address Line 2**: If applicable, enter the building name and unit or room number.
- **City***: Provide the city or ward name.
- **Prefecture***: Select the relevant prefecture.
- **Postal Code***: Enter the area's postal code.
- **Country***: Select the country from the dropdown list.

Note:

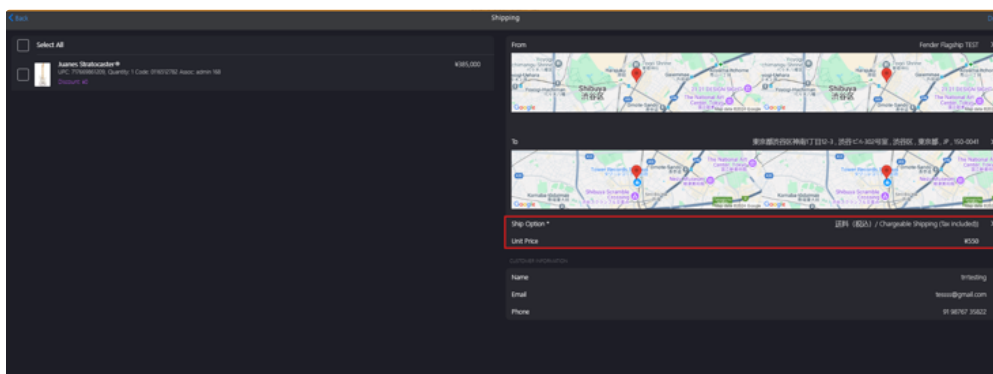
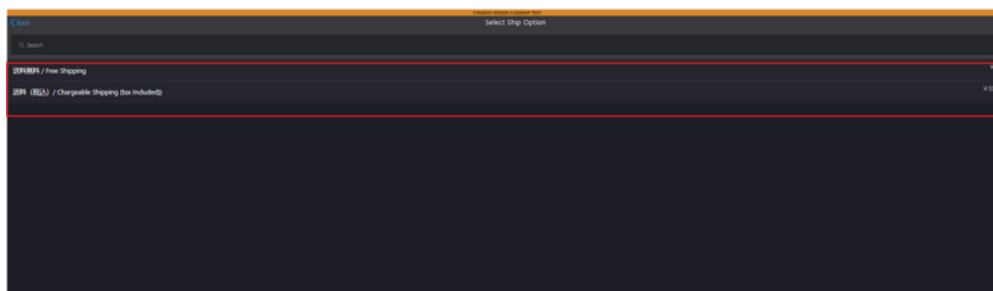
- * Indicates the field is mandatory.
- If the customer is already saved, use **Search address** box to locate and select the saved address.

8. Click **Save Address to customer** checkbox to save the address to existing customer profile.

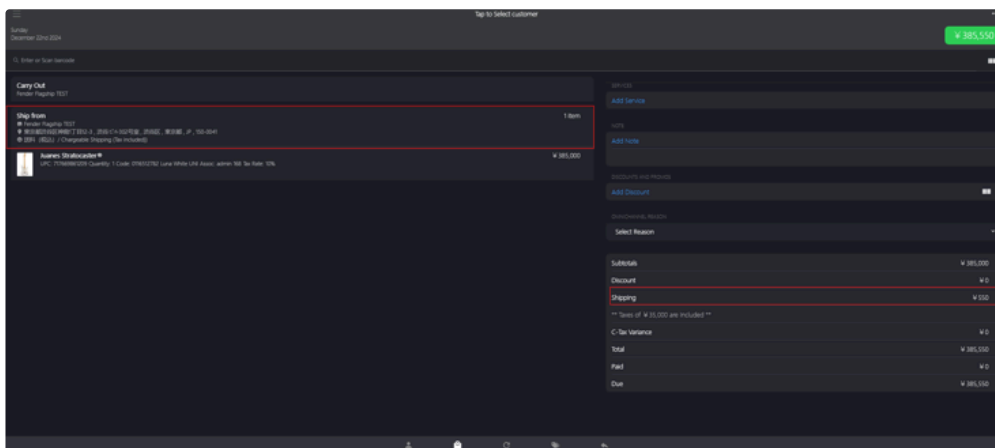
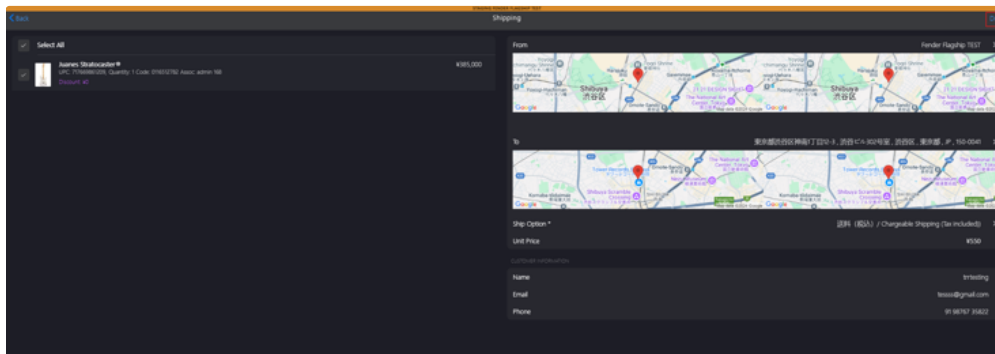
9. Click **Save** to add the **To** address.



10. Click **Ship Option*** to select either **Free Shipping** or **Chargeable Shipping (tax included)**.



11. Click **Done** to return to the **Sales Order** page to complete the payment for the selected product.



Shipping Process: Pick, Pack, and Ship

Introduction

XY POS has developed a streamlined order delivery process designed to enhance the efficiency of order delivery after adding the shipping address and confirming the customer's order. This shipping process is called **Pick, Pack,** and **Ship.**

- [Pick](#)
- [Pack](#)
- [Ship](#)

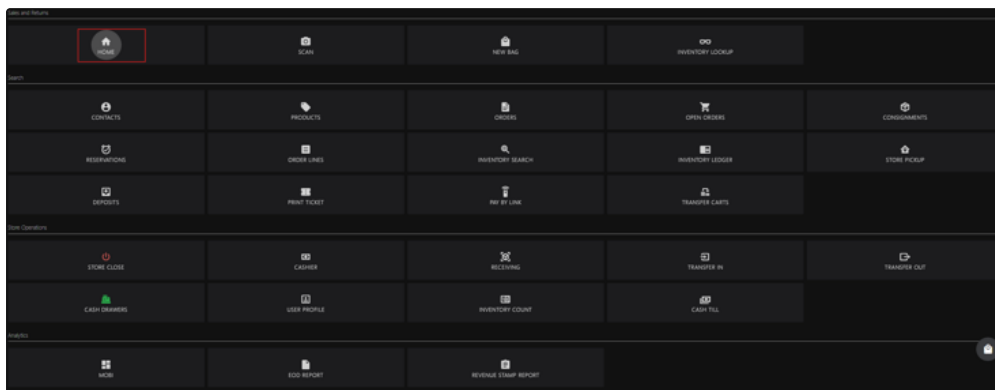
Pick

Introduction

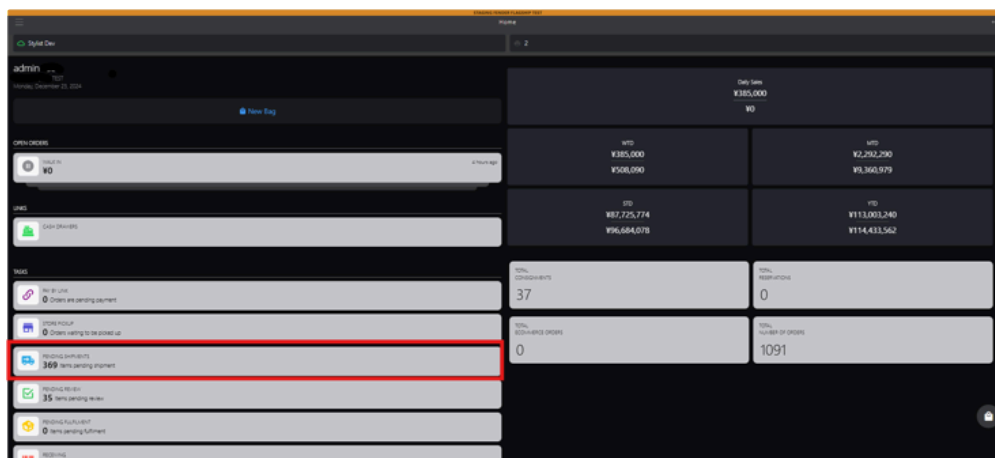
This topic explains the initial step in the shipping process, known as **Pick**. This process phase involves the order shipment confirmation after successfully adding the shipment address, selecting the type of shipment, and completing all the product and shipping charge payments.

Steps to Pick the Order

1. Click **HOME** to return to the burger menu.

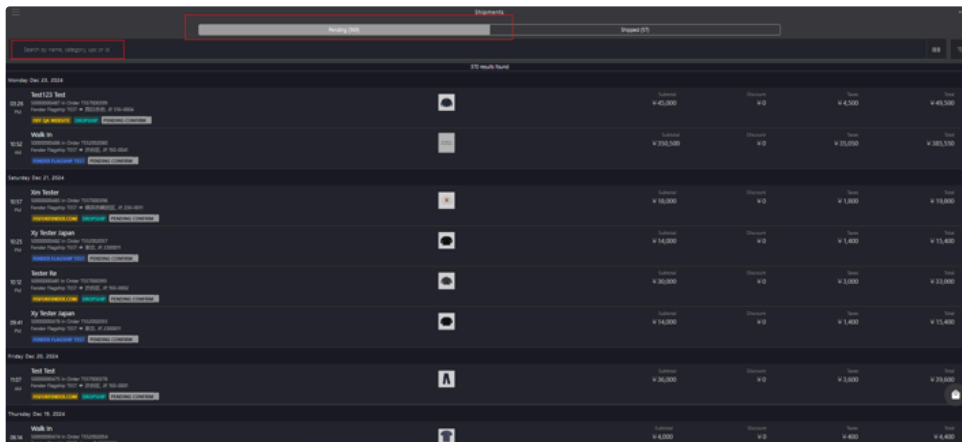


2. Click **PENDING SHIPMENTS** to go to **shipments** page.



3. Search for the order shipment in the **Shipment Pending** status using any of the following method:

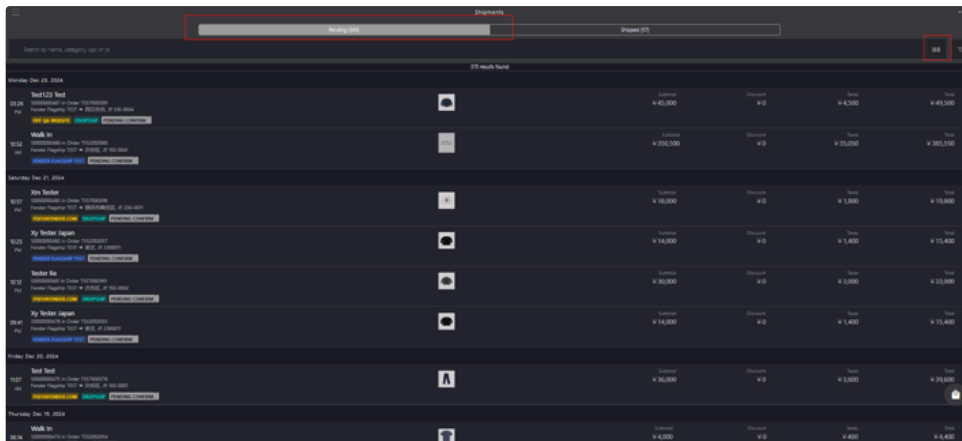
a. Enter the criteria in the search box, such as:



Item ID	Item Name	Category	Price	Barcode
1026	Walk in	Men Sucker	\$4,500	888888888888
1027	Men Sucker	Men Sucker	\$1,000	888888888888
1028	My Sucker Japan	My Sucker Japan	\$1,400	888888888888
1029	Sucker By	Sucker By	\$1,000	888888888888
1030	Sucker Japan	Sucker Japan	\$1,400	888888888888
1031	Walk in	Walk in	\$4,500	888888888888

- i. name
- ii. category
- iii. upc
- iv. id

b. Scan the item barcode.



Item ID	Item Name	Category	Price	Barcode
1026	Walk in	Men Sucker	\$4,500	888888888888
1027	Men Sucker	Men Sucker	\$1,000	888888888888
1028	My Sucker Japan	My Sucker Japan	\$1,400	888888888888
1029	Sucker By	Sucker By	\$1,000	888888888888
1030	Sucker Japan	Sucker Japan	\$1,400	888888888888
1031	Walk in	Walk in	\$4,500	888888888888

c. Apply the [filters](#) based on the category.

Order ID	Order Date	Order Type	Customer Name	Item Name	Quantity	Unit Price	Total Price	Status
9126	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	45,000	45,000	PENDING CONFIRMED
1232	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	350,500	350,500	PENDING CONFIRMED
9127	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	18,000	18,000	PENDING CONFIRMED
9125	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	14,000	14,000	PENDING CONFIRMED
9132	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	30,000	30,000	PENDING CONFIRMED
9141	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	14,000	14,000	PENDING CONFIRMED
9127	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	36,000	36,000	PENDING CONFIRMED
1234	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	4,000	4,000	PENDING CONFIRMED

4. Click the **PENDING CONFIRMED** order from the list.

Order ID	Order Date	Order Type	Customer Name	Item Name	Quantity	Unit Price	Total Price	Status
9126	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	45,000	45,000	PENDING CONFIRMED
1232	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	350,500	350,500	PENDING CONFIRMED
9127	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	18,000	18,000	PENDING CONFIRMED
9125	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	14,000	14,000	PENDING CONFIRMED
9132	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	30,000	30,000	PENDING CONFIRMED
9141	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	14,000	14,000	PENDING CONFIRMED
9127	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	36,000	36,000	PENDING CONFIRMED
1234	Dec 19, 2024	Walk In	XXXXXXXXXX	Test 123 Test	1	4,000	4,000	PENDING CONFIRMED

5. Select the product's checkbox.

Order Details for 'Walk In' (Order ID: 1232)

Shipping ID: 0000000466

Shipping Method: 3PL (ESL) / Chargeable Shipping (See Inclusions)

Ship To: 1 item

Ship From: 1 item

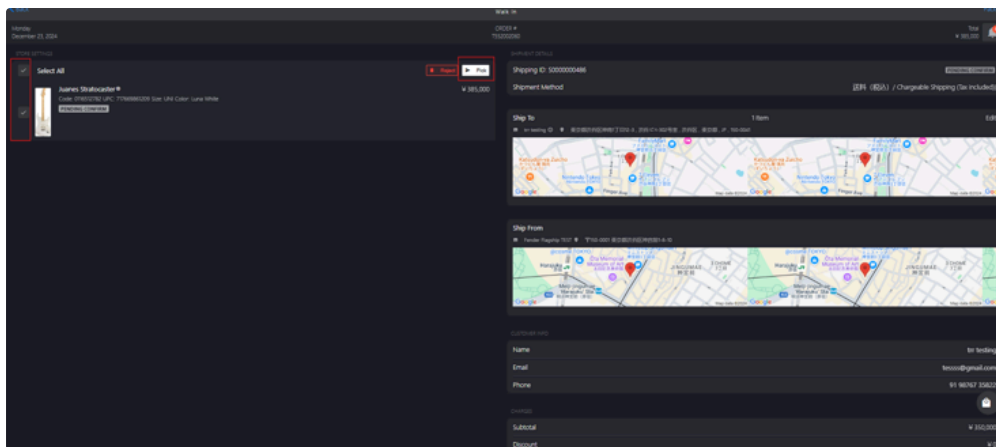
Customer Info:

- Name: In testing
- Email: test@gmail.com
- Phone: 91 98767 23452

Subtotal: ¥ 350,500

Discount: ¥ 0

6. Click **Pick** to change the shipment order status from **PENDING CONFIRM** to **CONFIRMED**.



- i The **Shipments** page displays pending shipments from all purchases, including in-store or via the mobile application, providing an omnichannel experience.

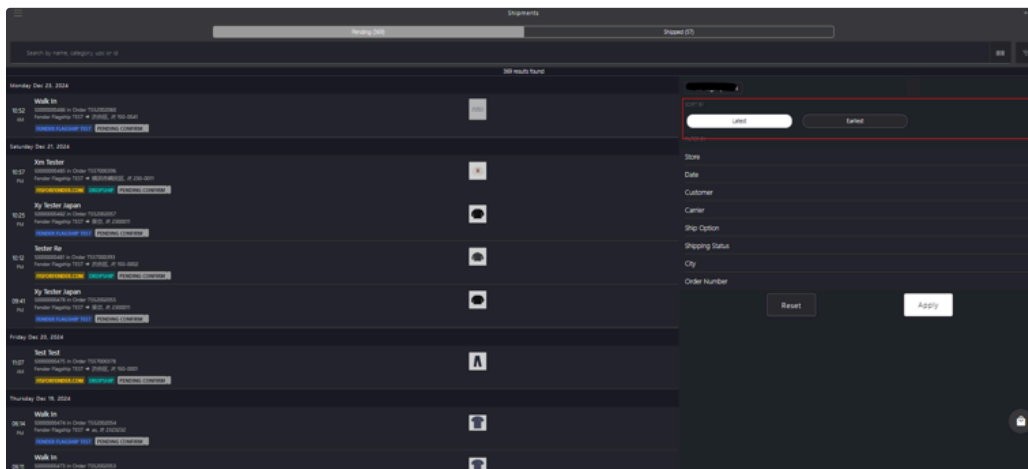
Built-in Shipment Filter

Introduction

Built-in shipment filter enhance the search experience with the drop-down menu filter category. You can tailor and sort the results to meet your precise requirements by selecting and applying specific criteria.

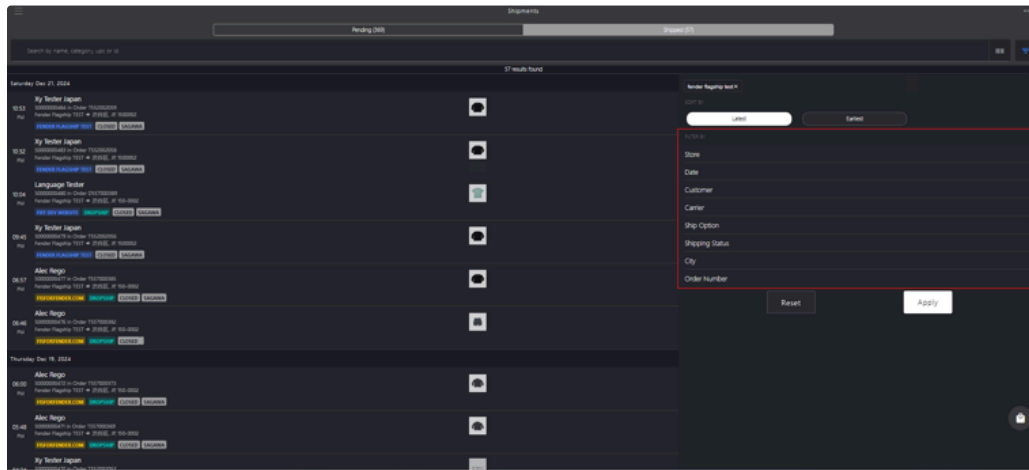
Filter Features

Sorting



Sorting Criteria	Description
Latest	Select the Latest option to view orders from the most recent date to the oldest.
Earliest	Select the Earliest option to view orders from the oldest date to the most recent.

Filter

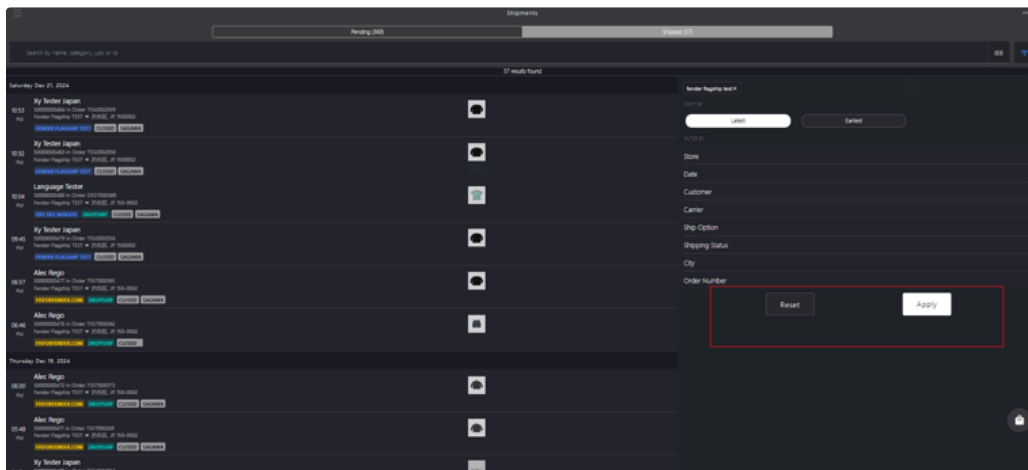


Filter Category	Description
Store	Select the store where the order request were generated.
Date	<p>Select Custom Range or Quick Link options to search for orders by the date they were generated.</p> <ol style="list-style-type: none"> Custom Range: Select a date range when the order was generated. <ol style="list-style-type: none"> Start: Click the start date field to select the date from the calendar. End: Click the end date field to select the end date from the calendar. Quick Links: Select from one of the following options when the order was generated:

	<p>a. Today</p> <p>b. Yesterday</p> <p>c. Week to Date</p> <p>d. Month to Date</p> <p>e. Year to Date</p>
Customer Name	<p>Search for the order by entering the customer's full name in the Enter Customer Last Name field who placed the order or select the checkbox next to the desired customer.</p>
Carrier	<p>Search for the shipping carrier responsible for order delivery by entering the carrier's name in the Search by Carrier field or select the checkbox next to the desired carrier.</p>
Ship Option	<p>Enter the shipping method in the Search by Ship Option field or select the checkbox next to the desired shipping options.</p> <p>XY POS offers the following shipping options:</p> <ul style="list-style-type: none"> • Chargeable Shipping: The customer has to pay for the shipping services, in addition to the product price and any applicable taxes. • Free Shipping: The customer does not have to pay for shipping services. Retailers will cover the service cost as part of promotional offers.
Shipping Status	<p>Enter the shippings status in Search by Shipping Status field.</p> <p>XY POS adopts following shipping statuses to achieve the efficient order delivery and</p>

	<p>fulfillment:</p> <ul style="list-style-type: none"> • PENDING CONFIRM: Shipment is awaiting confirmation to proceed. • CLOSED: Shipment is completed and delivered. • DROPSHIP: Shipment is handled directly by a third-party supplier. • CONFIRMED: Shipment is approved and ready for dispatch.
City	Enter the destination city in the Search by City field.
Order Number	Enter the order number in Search by Order Number field or select the checkbox next to the desired order number.

Action Buttons



Action Buttons	Description
Apply	Click the Apply button to apply filter criteria and display the requested

	order or orders list.
Reset	Click the Reset button to remove all the applied filters and return to default view.

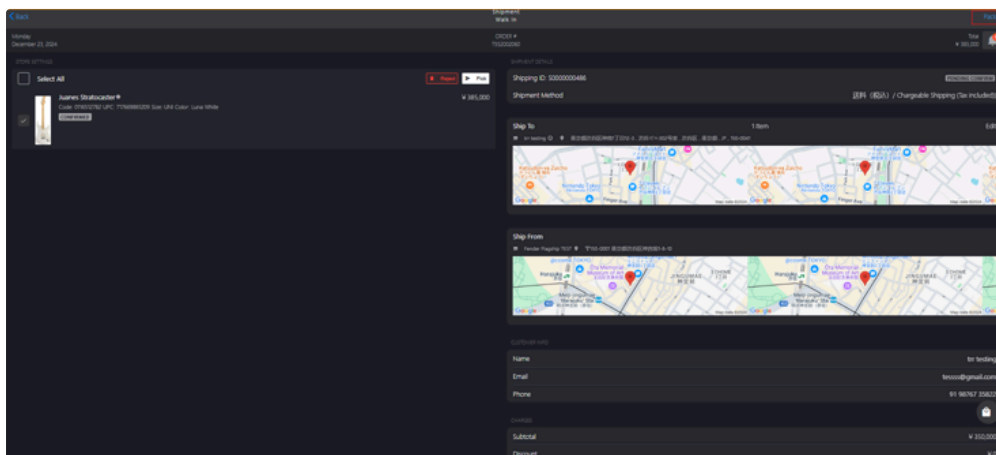
Pack

Introduction

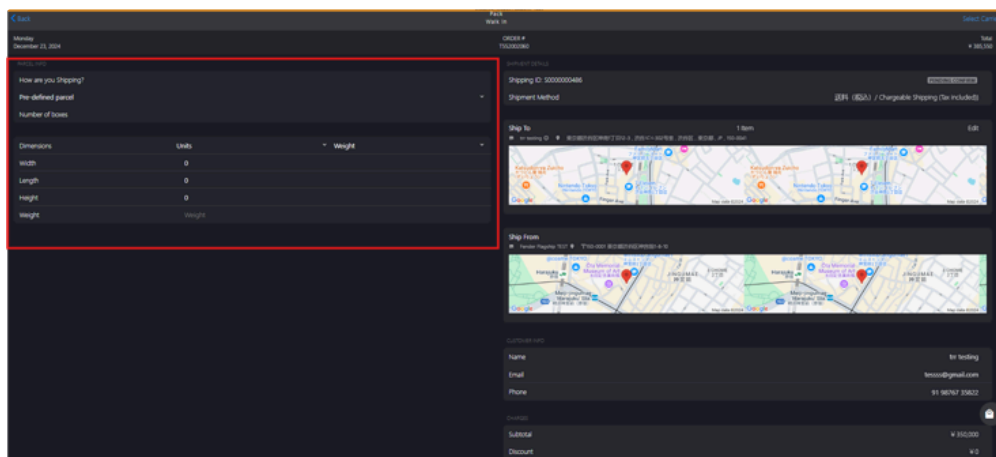
This topic explains the second step in the shipping process, known as **Pack**. This phase involves preparing the products for shipment by determining appropriate packaging based on dimensions, weight, and the number of units, following successful shipment confirmation.

Steps to Pack the Order

1. Click **Pack** to start the packaging of the confirmed shipment order.



2. Select the following options in **PARCEL INFO** section to pack the product for shipment.



a. **How are you shipping?**

- **Pre-defined parcel:** A standard box provided by the shipping service or the store. The dimension for this parcel is already set, so you don't need to manually enter its size or weight.
- **Custom box:** A packaging option which requires your input regarding dimensions and number of units.
 - **Width**
 - **Length**
 - **Height**
 - **Weight**
 - **Units**

b. **Number of boxes:** Enter the total number of boxes required for shipment.

Ship

This topic explains the third step in the shipping process, known as **Ship**. This phase involves selecting the appropriate courier service partner to ensure the timely delivery of the packed order, considering the specified delivery day and whether a confirmation signature is required.

The **Ship** phase is further classified into two categories auto shipment and manual shipment depending on how the carrier services are selected.

- [Ship Phase: Auto Shipment](#)
- [Ship Phase: Manual Shipment](#)

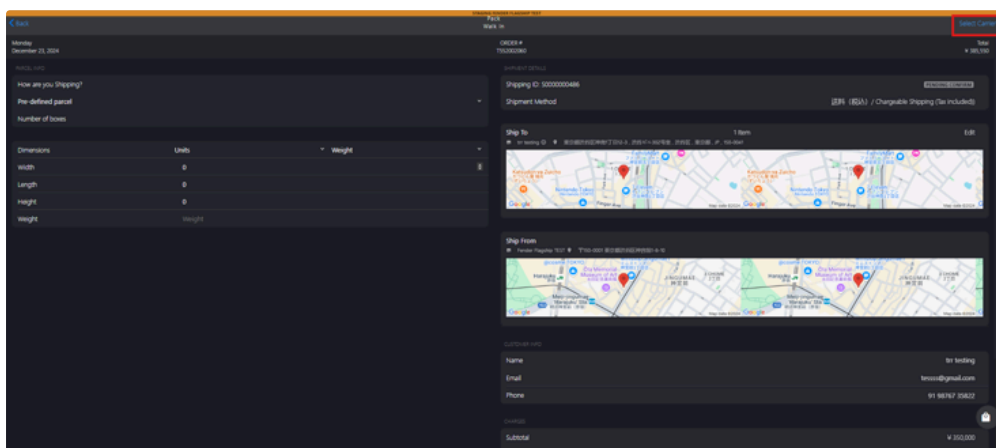
Ship Phase: Auto Shipment

Introduction

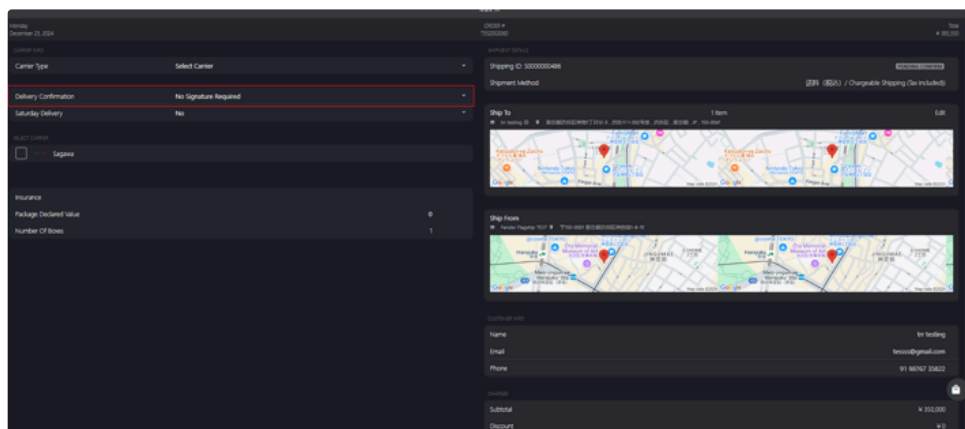
This topic explains the auto shipment process, where the carrier service for the packed product is selected from the **SELECT CARRIER** section. After initiating the shipping process, a shipping label is generated automatically.

Steps to Ship the Order

1. Click **Select Carrier** to efficiently deliver the packed item.



2. Select the following options in **CARRIER INFO** section:
 - a. Select one of the following options in **Delivery Confirmation**:



- No Signature Required
- Signature Required
- Adult Signature Required

b. Select one of the following option in **Saturday Delivery**:

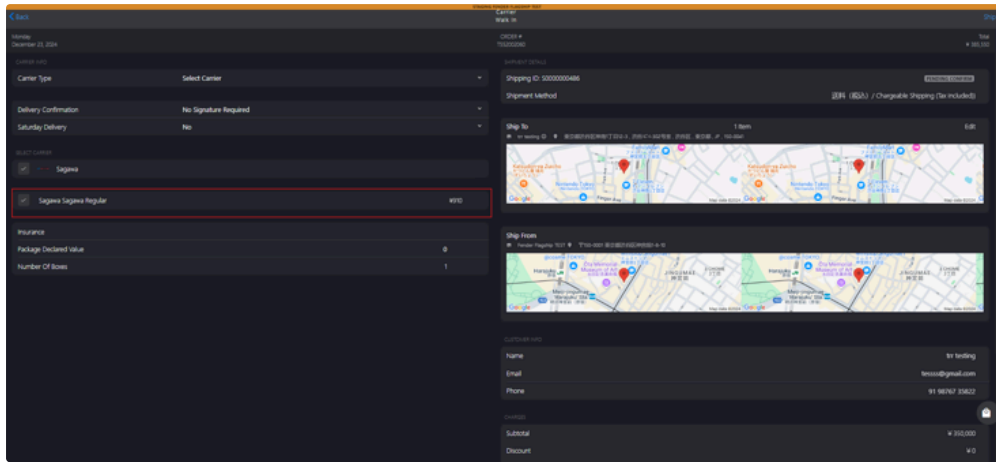
The screenshot shows the 'Saturday Delivery' section of the XY Retail POS interface. The 'Saturday Delivery' checkbox is highlighted with a red box, and the 'Signature' checkbox is also visible. The interface includes fields for 'Carrier Type', 'Delivery Confirmation', 'Signature Required', 'Saturday Delivery', and 'Signature'. It also displays shipping information, maps for 'Ship To' and 'Ship From', and a 'Customer' section with fields for Name, Email, and Phone. A 'Totals' section at the bottom shows Subtotal and Discount values.

- Yes
- No

3. Select an appropriate carrier checkbox from the list in **SELECT CARRIER** section.

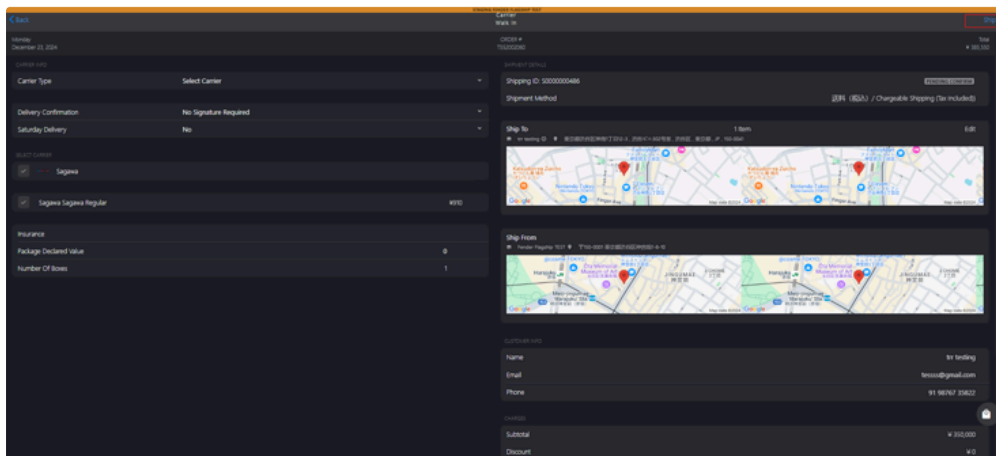
The screenshot shows the 'SELECT CARRIER' section of the XY Retail POS interface. The 'Signature' checkbox is highlighted with a red box. The interface includes fields for 'Carrier Type', 'Delivery Confirmation', 'Signature Required', 'Saturday Delivery', and 'Signature'. It also displays shipping information, maps for 'Ship To' and 'Ship From', and a 'Customer' section with fields for Name, Email, and Phone. A 'Totals' section at the bottom shows Subtotal and Discount values.

4. Select the estimated carrier price range checkbox, which is determined based on the delivery location.

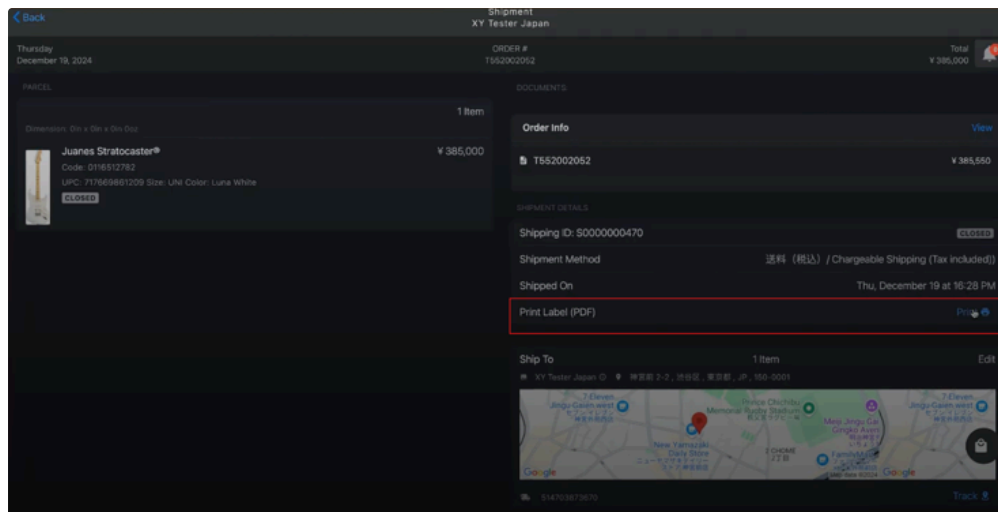


Note: The delivery price range checkbox will be displayed only after the selection of the courier service.

- Click **Ship** to commence the shipping process.generate a shipping label.



- Click **Print** to generate the shipping label.



7. The shipping label is attached to the package, and then dispatched to the designated delivery location.

Ship Phase: Manual Shipment

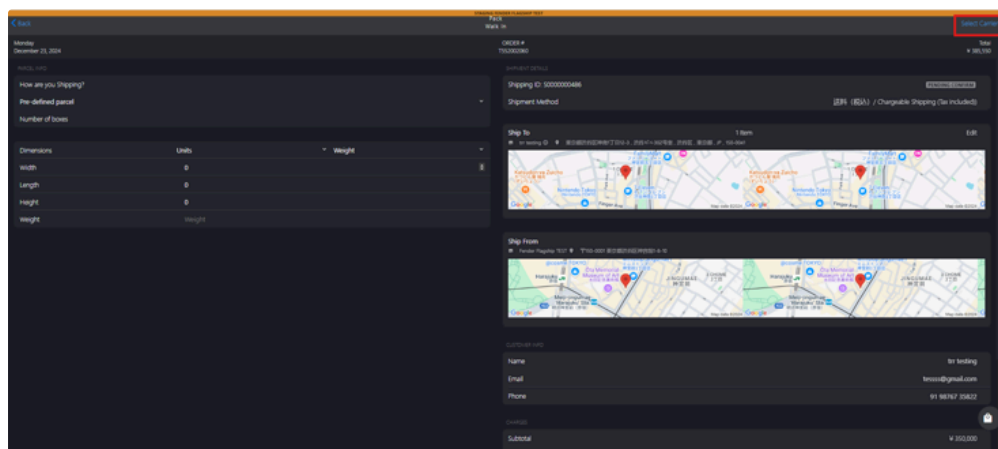
Introduction

This topic explains the manual shipment process, which is initiated only when the store encounters issues with API integration.

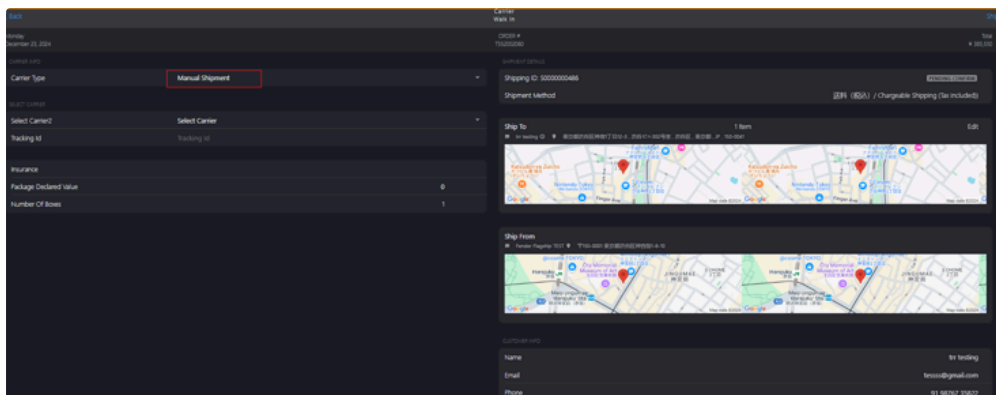
In manual shipment, initially, **Manual Shipment** is selected from the **CARRIER INFO** section and then a carrier is selected from the **Select Carrier** dropdown list. After confirming with the customer, the from and to addresses are added to an application form approved by the respective carrier. The form number then serves as the tracking ID.

Steps to Manual Ship the Order

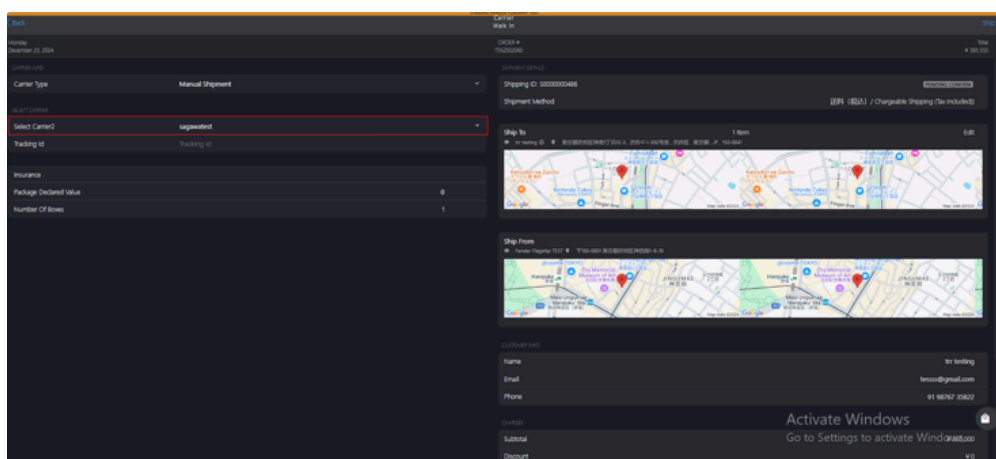
1. Click **Select Carrier** to efficiently deliver the packed item.



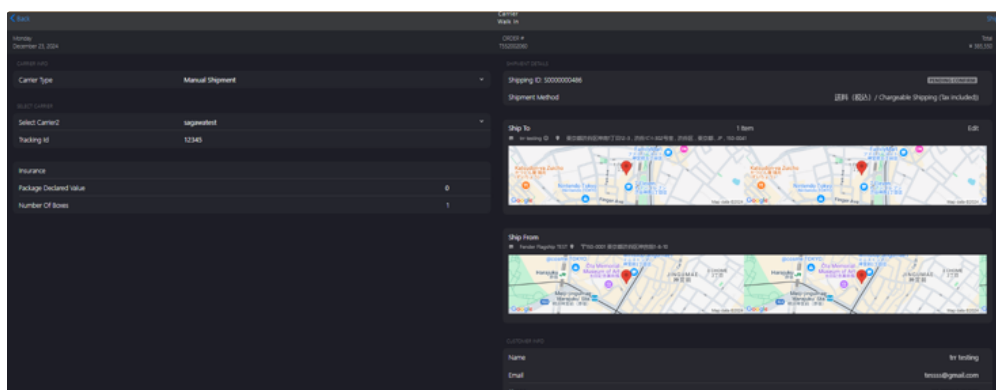
2. Select **Manual Shipment** from the **Select Carrier** dropdown list in **Carrier Type** option under **CARRIER INFO** section.



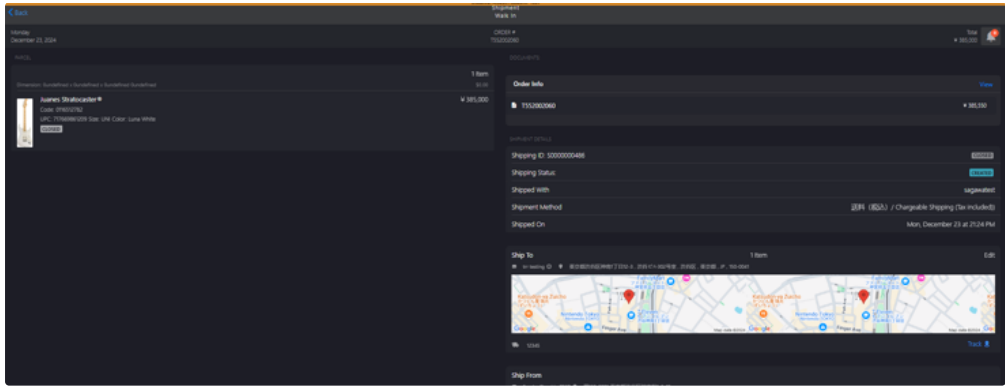
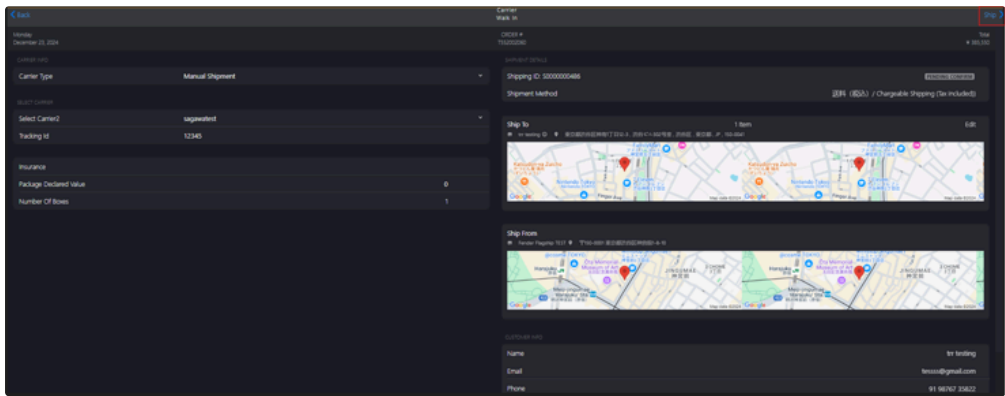
3. Select an appropriate carrier from the **Select Carrier** dropdown list in **SELECT CARRIER2** option under **SELECT CARRIER** section.



4. Enter the carrier approved application form number in the **Tracking ID** field.



5. Click **Ship** to commence the shipping process.



Tax Retrieve Archive Documentation for Audits

The **Tax Retrieve Archive Documentation** is a critical feature designed to ensure seamless access to and retrieval of archived fiscal data related to store operations for specified periods (daily, monthly, yearly, or custom-defined ranges). This functionality encompasses essential records, including:

- **Receipts:** Both sales and returns.
- **Duplicate Receipts:** For auditing and validation of reprints.
- **Invoices:** Comprehensive transaction details for compliance.
- **Tax Records:** Detailed tax computations and breakdowns.
- **Grand Totals:** Cumulative and perpetual financial summaries.

This feature is specifically structured to support compliance analysis and meet the rigorous auditing requirements of regulatory bodies under the NF525 certification standards.

- [Downloading Daily Archive Report](#)
- [Downloading Periodic Archive Report](#)
- [Accessing FISCAL REGISTER REPORT](#)

Downloading Daily Archive Report

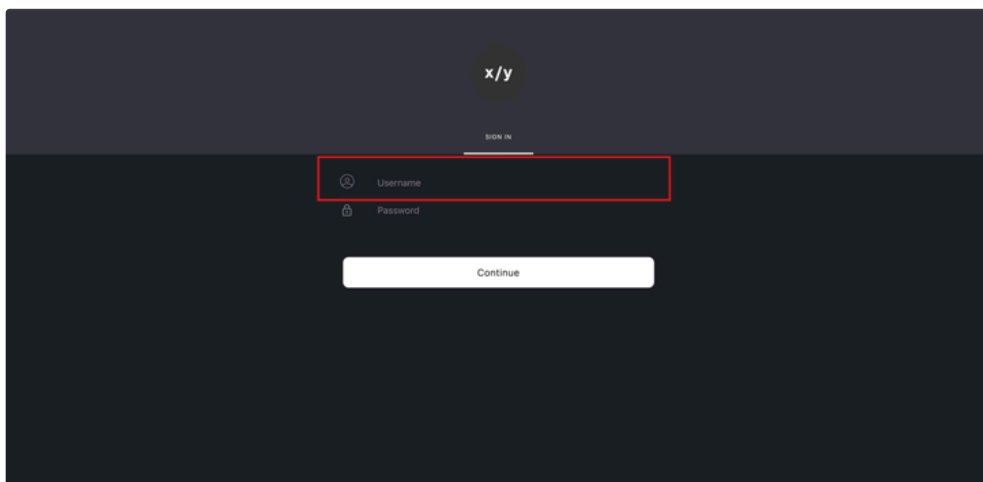
Introduction

This topic outlines the step-by-step procedure to download the daily archive report in the XY Stylist application, ensuring seamless access to compliance and operational records.

Steps to Download the Daily Archive Report

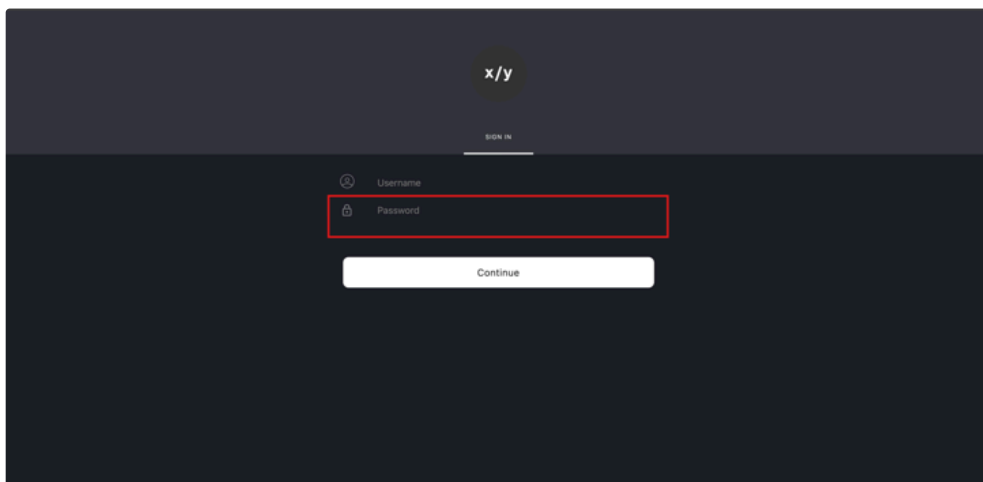
1. Sign in to XY Stylist

- a. Enter the Auditor's email address (for example, auditor@xystore.com) in the **Username** field.

A screenshot of the XY Stylist sign-in interface. The background is dark grey. At the top center, the text 'x/y' is displayed in white. Below it, the words 'SIGN IN' are written in small white capital letters. There are two input fields: 'Username' with a person icon and 'Password' with a lock icon. The 'Username' field is highlighted with a red rectangular border. Below the fields is a white 'Continue' button.

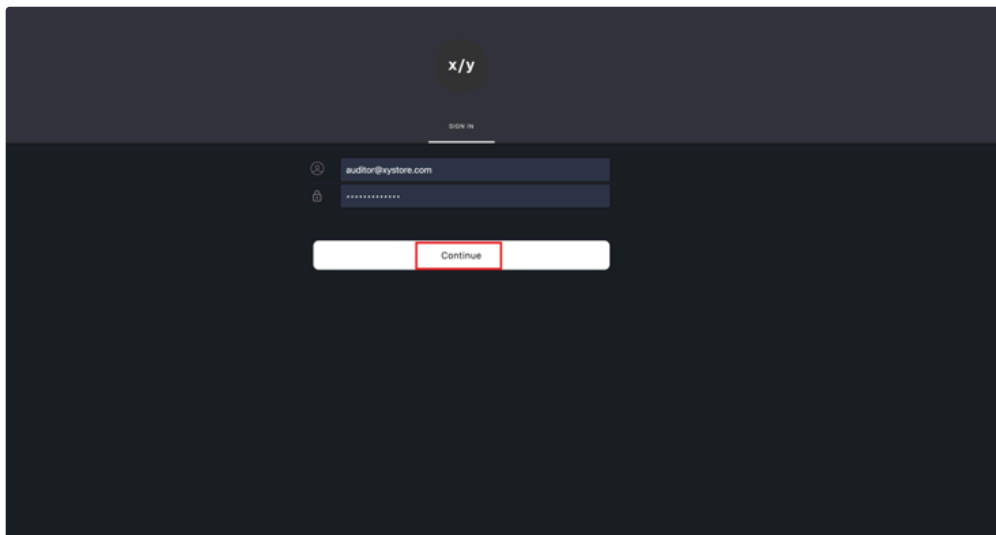
Username

- b. Enter the corresponding password in the **Password** field.

A screenshot of the XY Stylist sign-in interface, identical to the previous one. The 'Password' field, which has a lock icon, is now highlighted with a red rectangular border. The 'Continue' button remains visible below the fields.

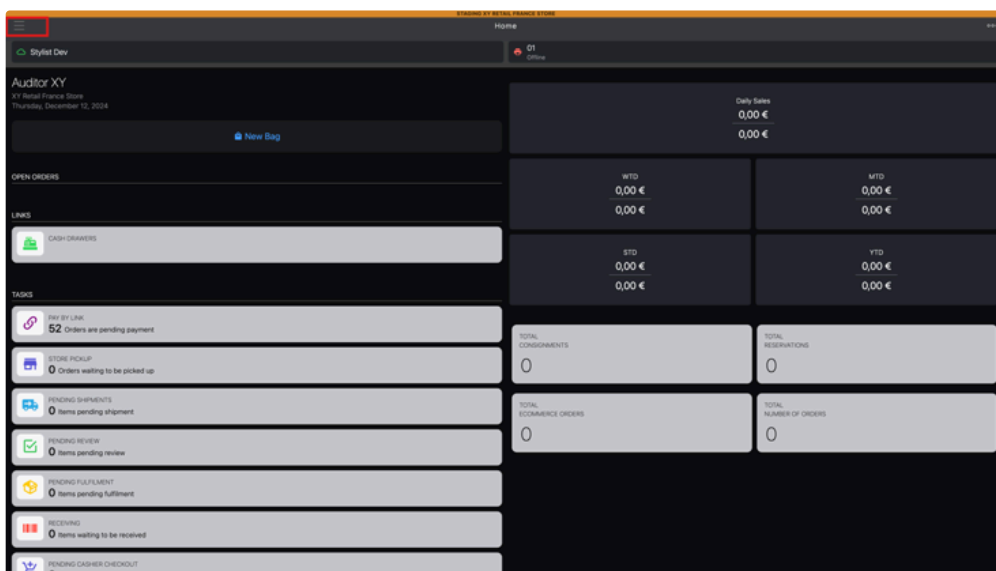
Password

c. Click **Continue** to proceed.



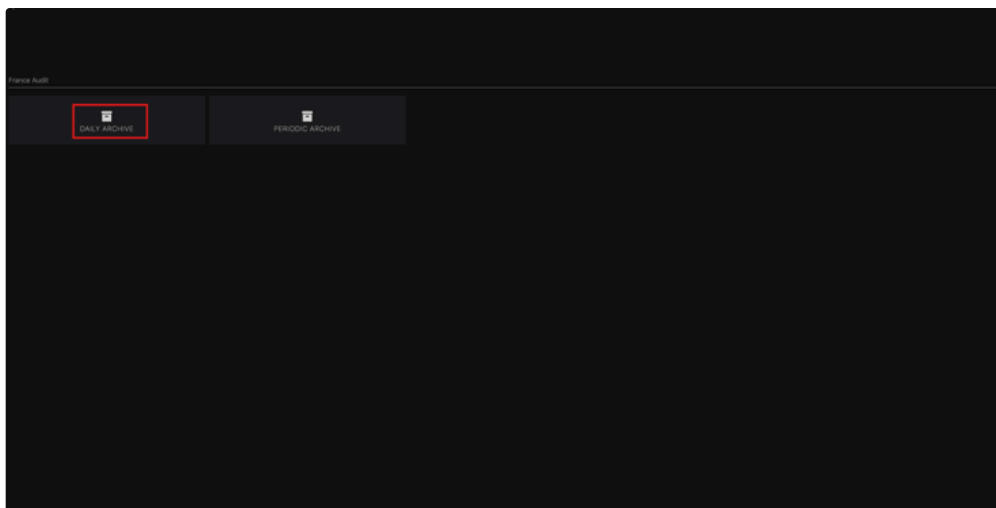
2. Access the Archive Section

a. Click the **burger menu** (☰) in the top-left corner.



XY Stylist POS Homepage

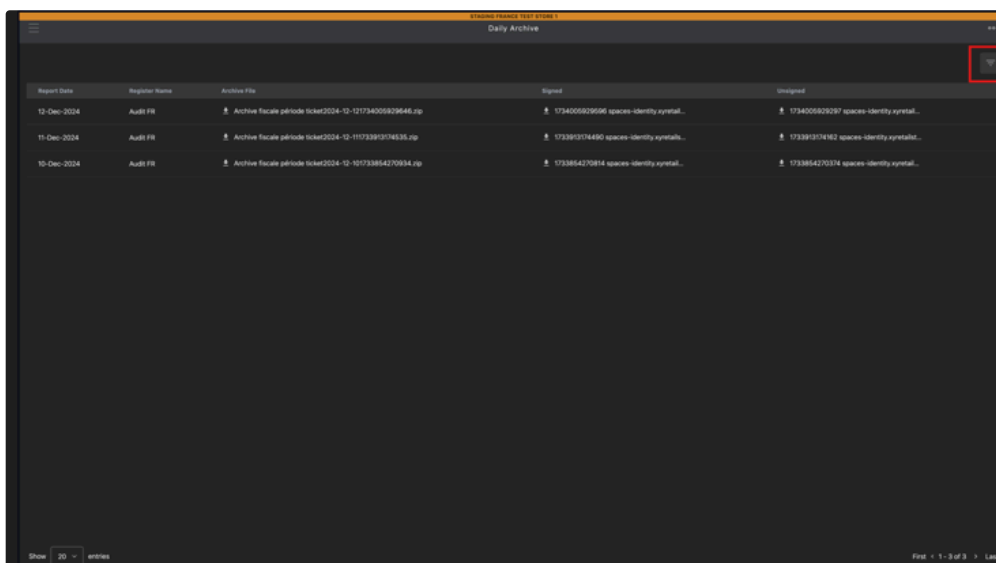
b. Select **DAILY ARCHIVE** from the menu to open the archive page.



Daily Archive Button

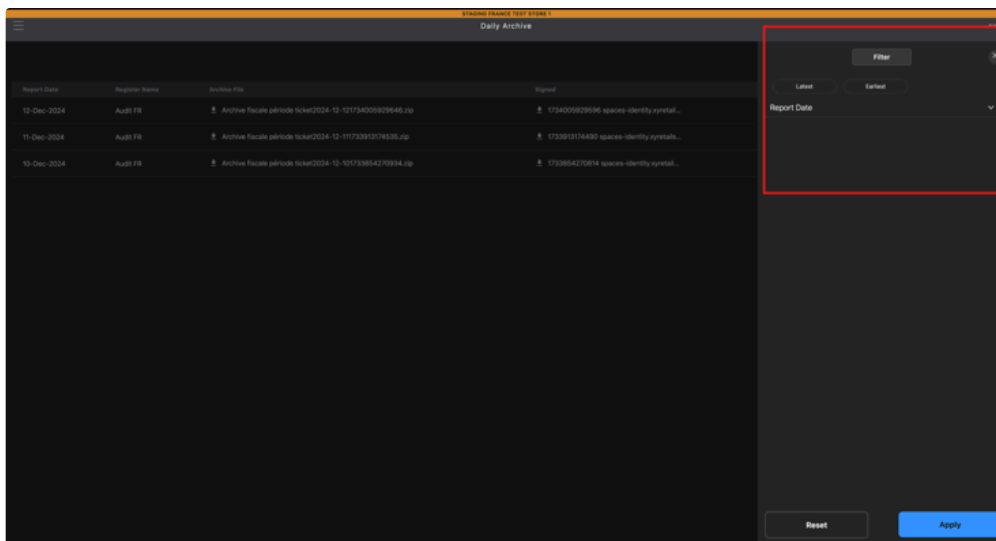
3. Filter the Reports

- a. Click the **Filter** icon to refine the archive list.



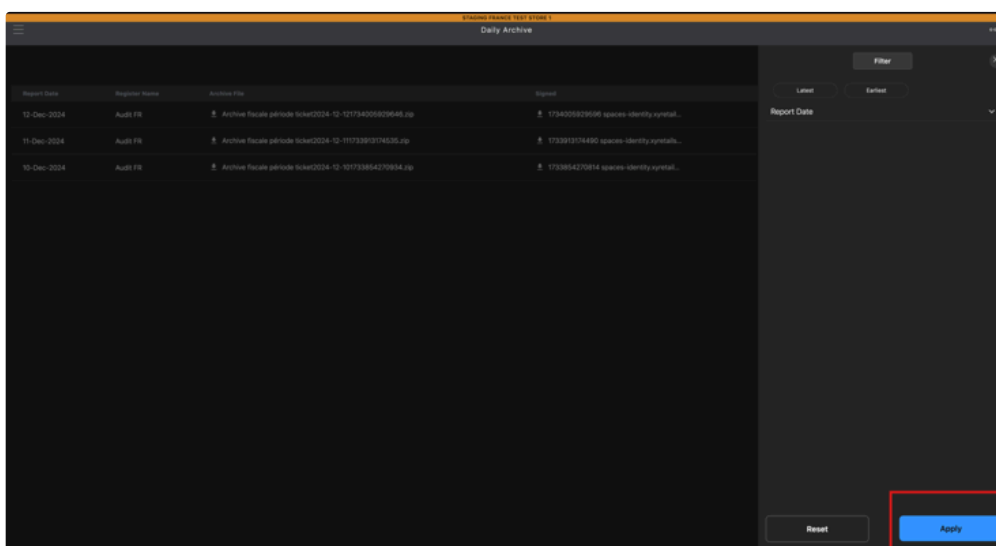
Daily Archive screen

- b. Choose one of the following filter options:



Filter panel

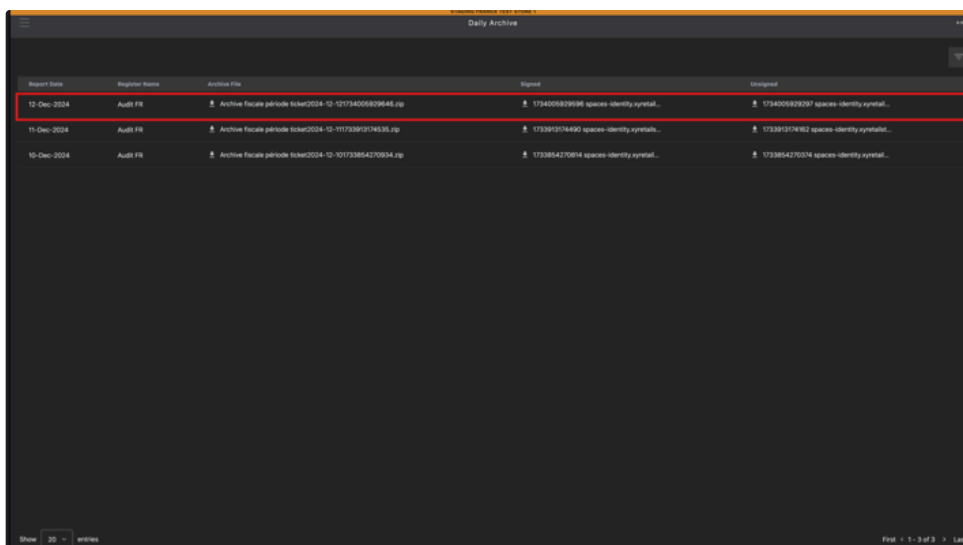
- **Latest:** View reports from the most recent date to the oldest.
 - **Earliest:** View reports from the oldest date to the most recent.
 - **Report Date:** Specify a custom date range to view reports for the selected period.
- c. Click **Apply** to apply the selected filter.



Hit apply to select desired date

4. Locate the Desired Report

- a. Find the desired report row based on the selected date in the **Respective Report Date** column.



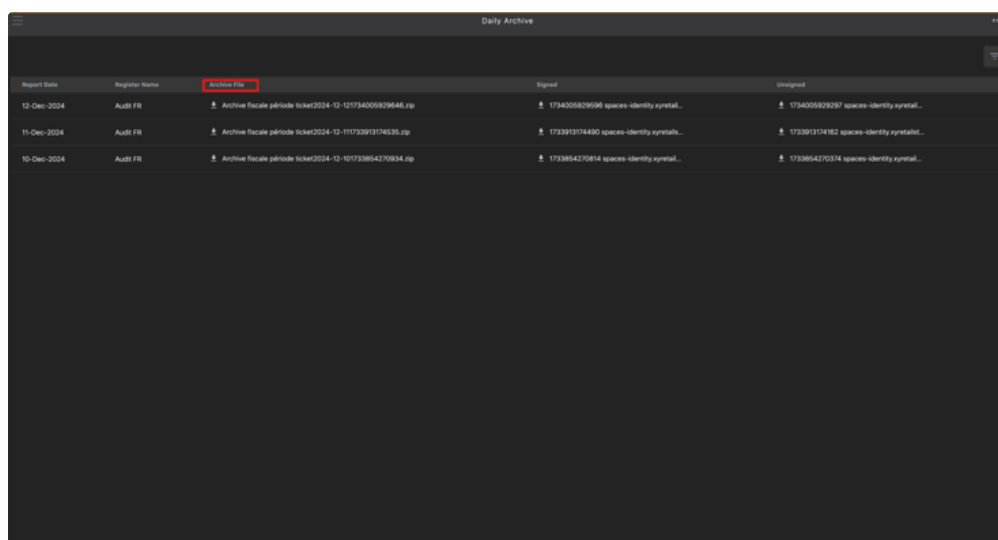
The screenshot shows a table titled "Daily Archive" with the following columns: Report Date, Register Name, Archive File, Signed, and Unsigned. The first row is highlighted in red.

Report Date	Register Name	Archive File	Signed	Unsigned
12-Dec-2024	Audi FR	Archive fiscale periode ticket2024-12-121734005929646.zip	1734005929696 spaces-identity.xyretail...	1734005929297 spaces-identity.xyretail...
11-Dec-2024	Audi FR	Archive fiscale periode ticket2024-12-111733913174535.zip	1733913174490 spaces-identity.xyretail...	1733913174162 spaces-identity.xyretail...
10-Dec-2024	Audi FR	Archive fiscale periode ticket2024-12-101733854270934.zip	1733854270874 spaces-identity.xyretail...	1733854270374 spaces-identity.xyretail...

b. Navigate to the **Archive File** column in the same row.

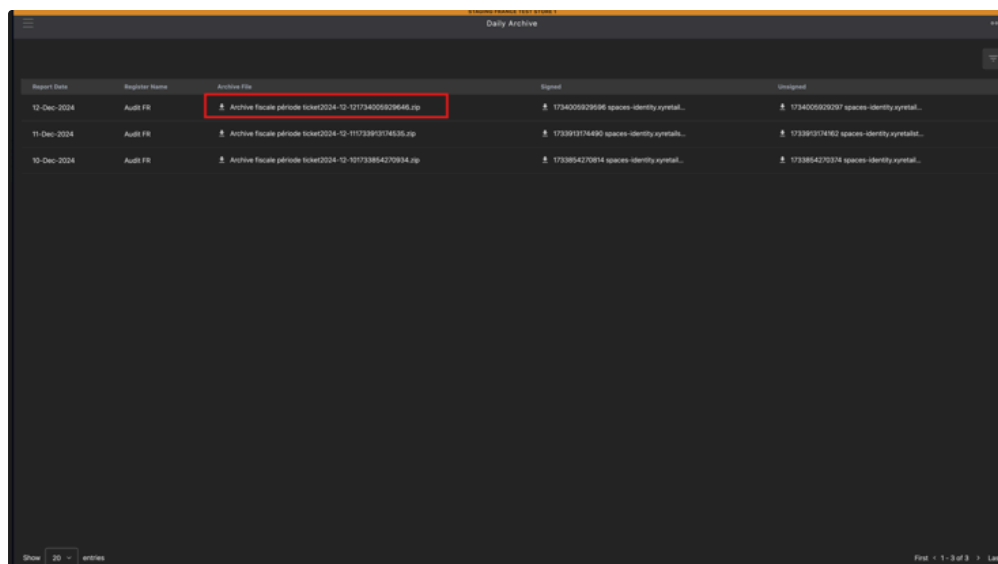
5. Download the Report

a. Click the file in the **Archive File** column to download the corresponding daily archive report for the specific date.



The screenshot shows the same "Daily Archive" table as above, but with the "Archive File" column header highlighted in red.

Report Date	Register Name	Archive File	Signed	Unsigned
12-Dec-2024	Audi FR	Archive fiscale periode ticket2024-12-121734005929646.zip	1734005929696 spaces-identity.xyretail...	1734005929297 spaces-identity.xyretail...
11-Dec-2024	Audi FR	Archive fiscale periode ticket2024-12-111733913174535.zip	1733913174490 spaces-identity.xyretail...	1733913174162 spaces-identity.xyretail...
10-Dec-2024	Audi FR	Archive fiscale periode ticket2024-12-101733854270934.zip	1733854270874 spaces-identity.xyretail...	1733854270374 spaces-identity.xyretail...



Report Date	Register Name	Archive File	Signal	Original
12-Dec-2024	Audit FR	Archive facade période ticket2024-ID-121734005929646.zip	1734005929596 spaces-identity.xyretal...	1734005929297 spaces-identity.xyretal...
11-Dec-2024	Audit FR	Archive facade période ticket2024-ID-111733913174635.zip	1733913174490 spaces-identity.xyretal...	1733913174162 spaces-identity.xyretalst...
10-Dec-2024	Audit FR	Archive facade période ticket2024-ID-101733854270934.zip	1733854270814 spaces-identity.xyretal...	1733854270314 spaces-identity.xyretal...

Show 20 entries Page 1 - 3 of 3 Last

Note

Ensure the correct credentials are used for access, and verify the selected filters to retrieve the desired reports accurately. This procedure ensures easy and compliant access to daily archive records for auditing and operational review.

Downloading Periodic Archive Report

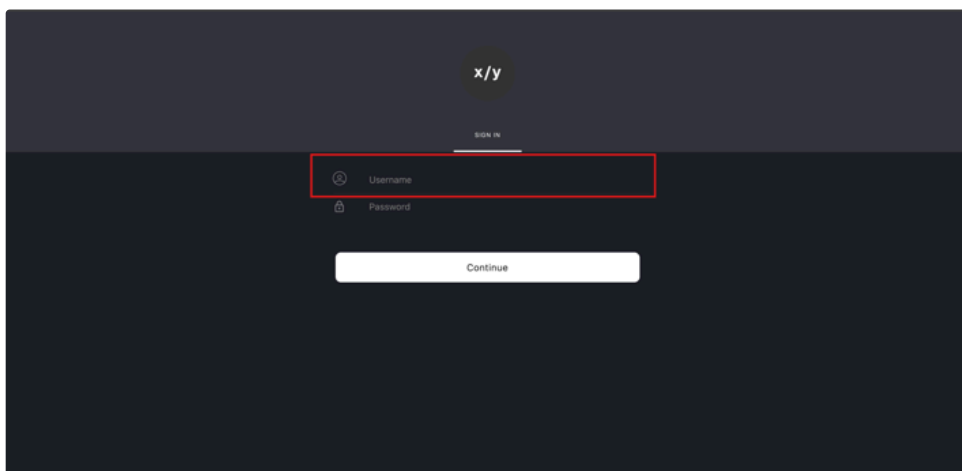
Introduction

This topic outlines the step-by-step procedure for downloading a periodic archive report using the XY Stylist application. The periodic archive report provides comprehensive data for a selected date range, ensuring easy access for compliance and review purposes.

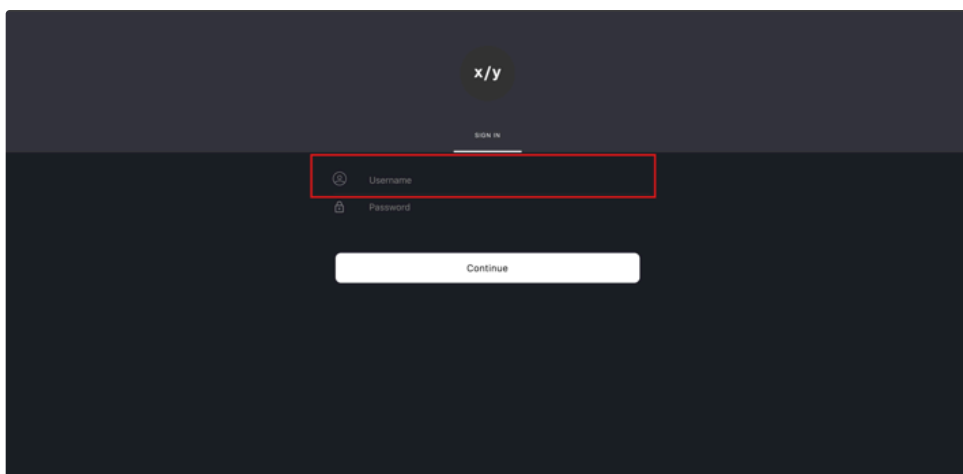
Steps to Download Daily Archive Report

1. Sign in to XY Stylist

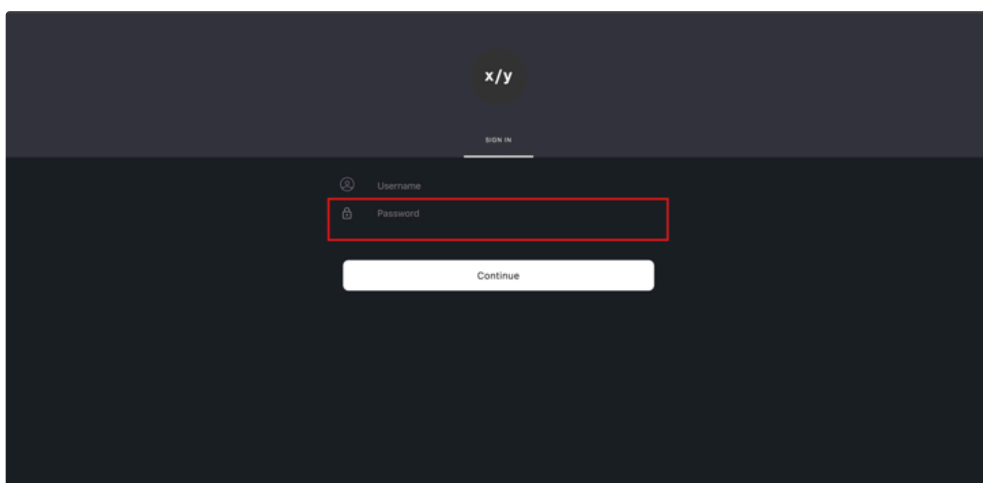
- a. Enter the Auditor's email address (for example, auditor@xystore.com) in the **Username** field.



- b. Enter the corresponding password in the **Password** field.

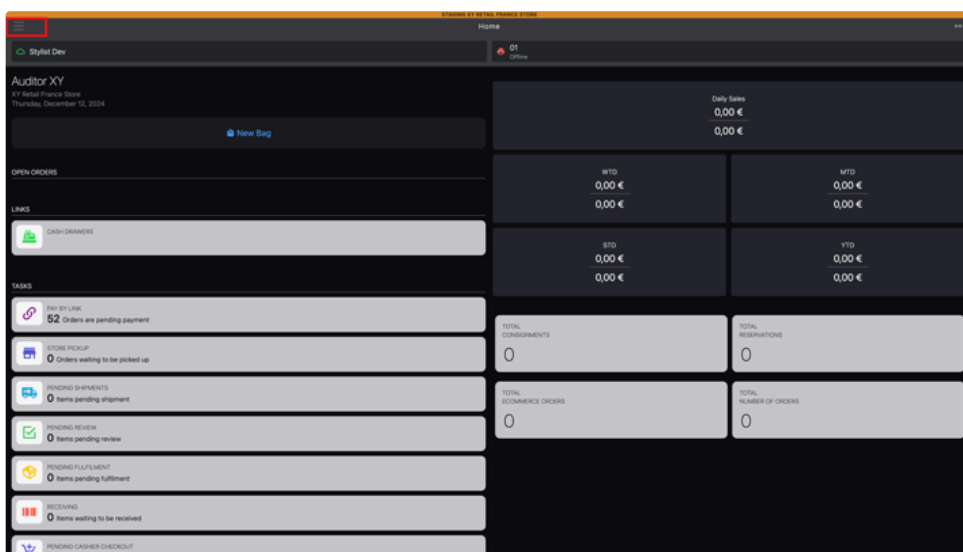


c. Click **Continue** to proceed.

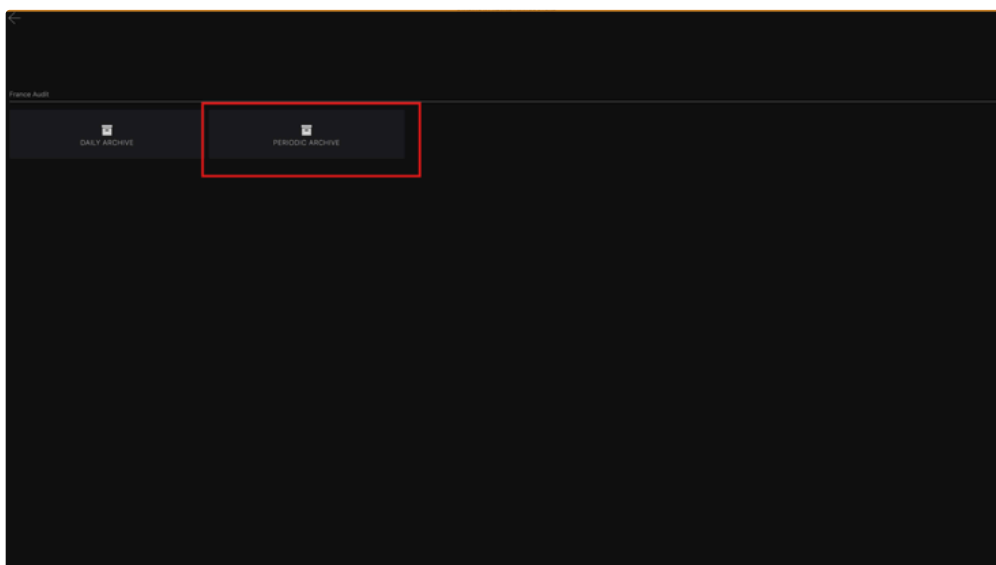


2. Navigate to the Periodic Archive Section

a. Click the **burger menu** (\equiv) located in the top-left corner.

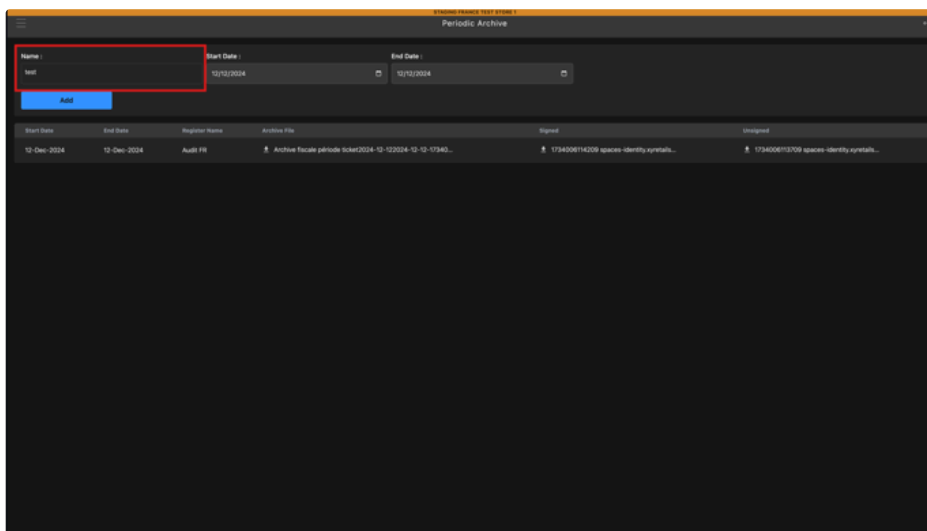


- b. Select **PERIODIC ARCHIVE** from the menu to access the periodic archive page.

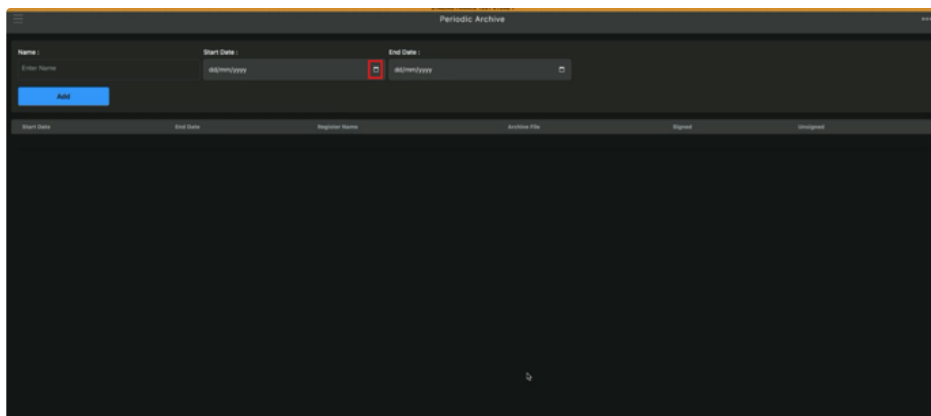


3. Enter Archive Details

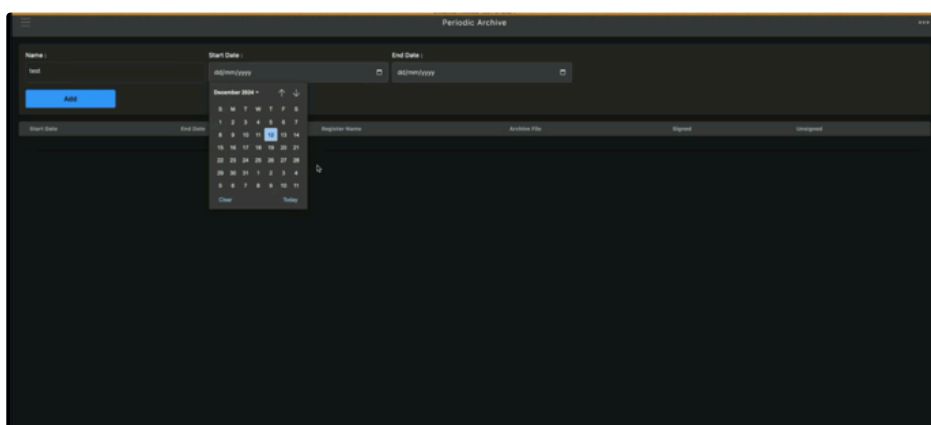
- a. **Name:** Enter a name in the **Name** field to label the report.



- b. **Start Date:**
- i. Click the **Start Date** calendar icon.

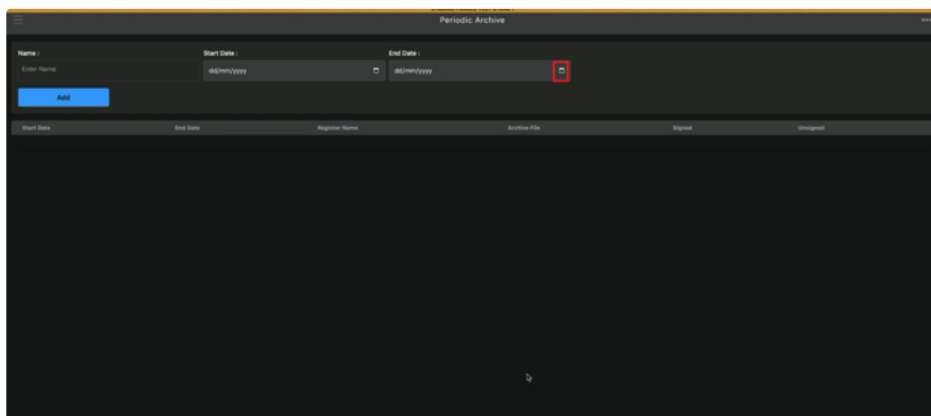


ii. Select the desired start date for the report.

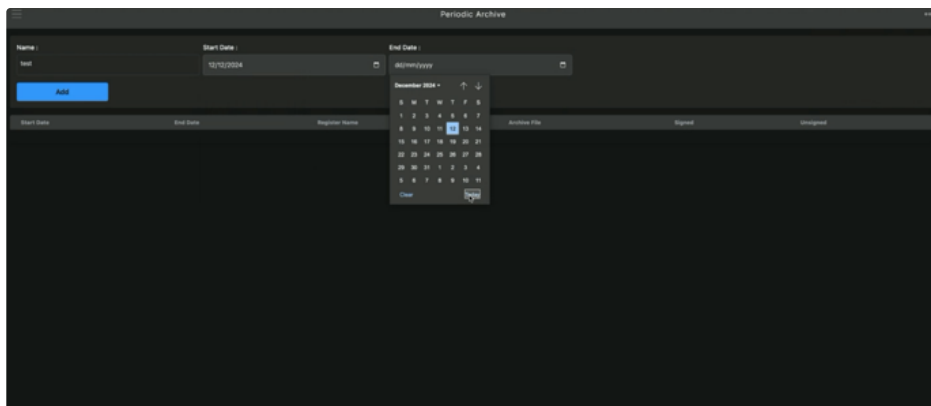


c. End Date:

i. Click the **End Date** calendar icon.

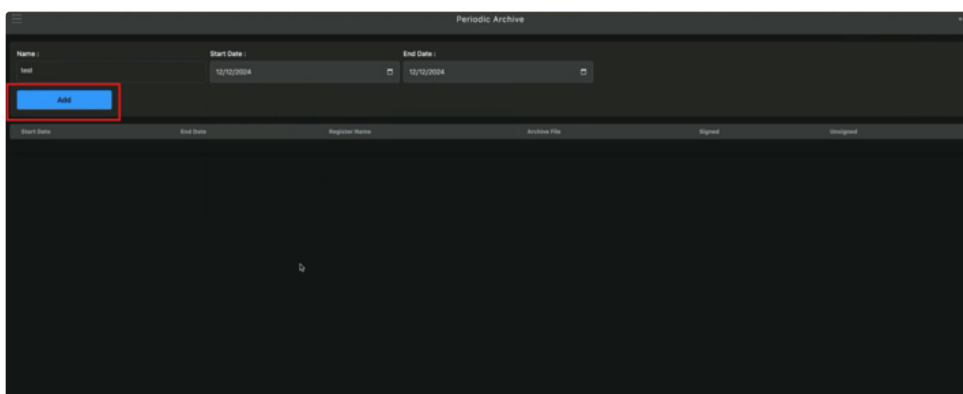


ii. Select the desired end date for the report.



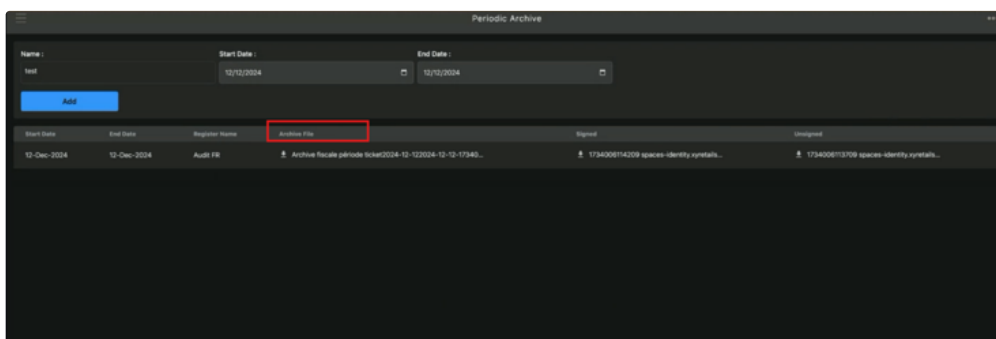
4. Generate the Report

- a. Click **Add** to generate the archive report for the specified period.

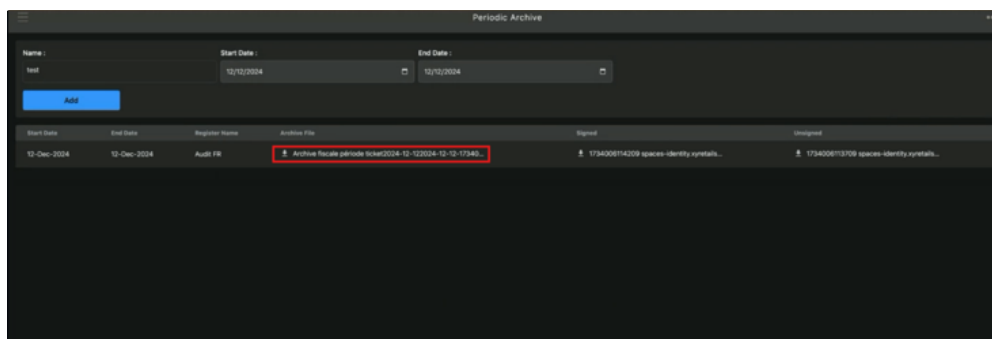


5. Download the Report

- a. Locate the generated report in the **Archive File** column.



- b. Click the file in the **Archive File** column to download the periodic archive report.



Note

- Ensure you specify the correct date range to retrieve the desired report.
- Verify that you have appropriate permissions and credentials to access the periodic archive.
- For any discrepancies or issues, contact the support team for assistance.

This procedure ensures a seamless and efficient way to access periodic archive reports for operational and compliance needs.

Accessing FISCAL REGISTER REPORT

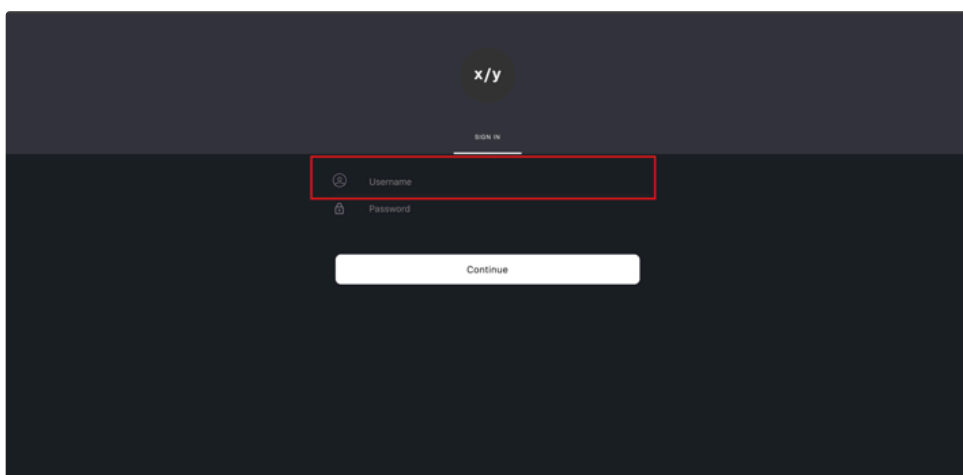
Introduction

This topic explains the step-by-step process for accessing fiscal register reports in the XY Stylist application. The reports offer detailed data on store events, invoices, and receipts across various time frames, including the current day, daily, monthly, yearly, and lifetime, supporting compliance and review processes.

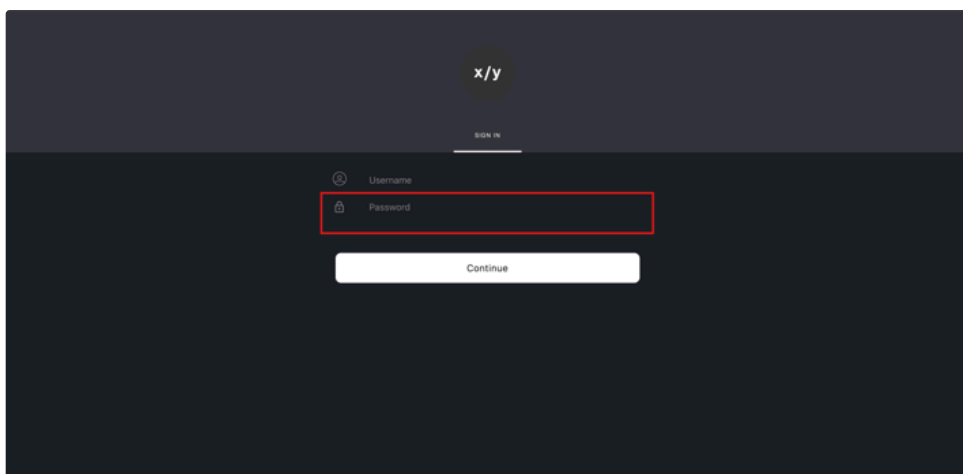
Steps to Access Fiscal Register Report

1. Sign in to XY Stylist

- a. Enter the Auditor's email address (for example, auditor@xystore.com) in the **Username** field.



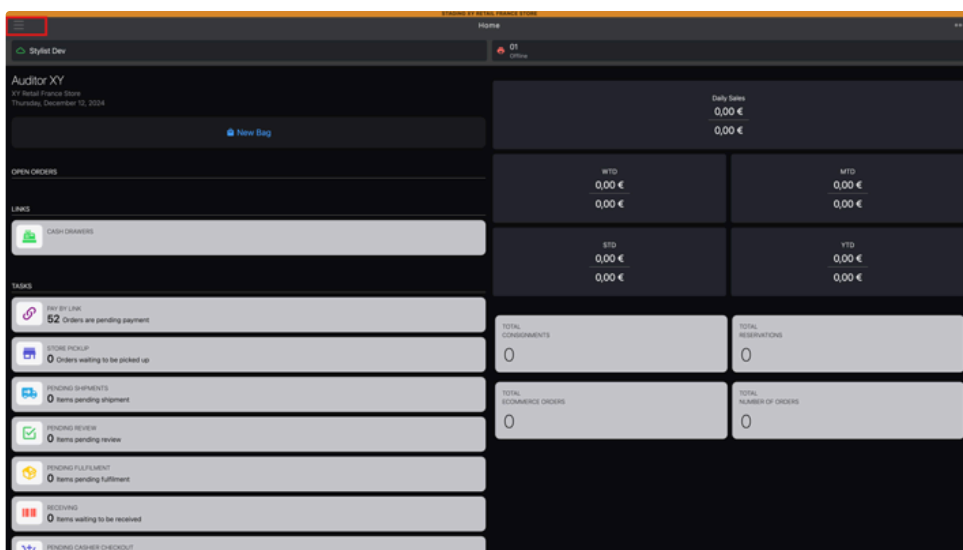
- b. Enter the corresponding password in the **Password** field.



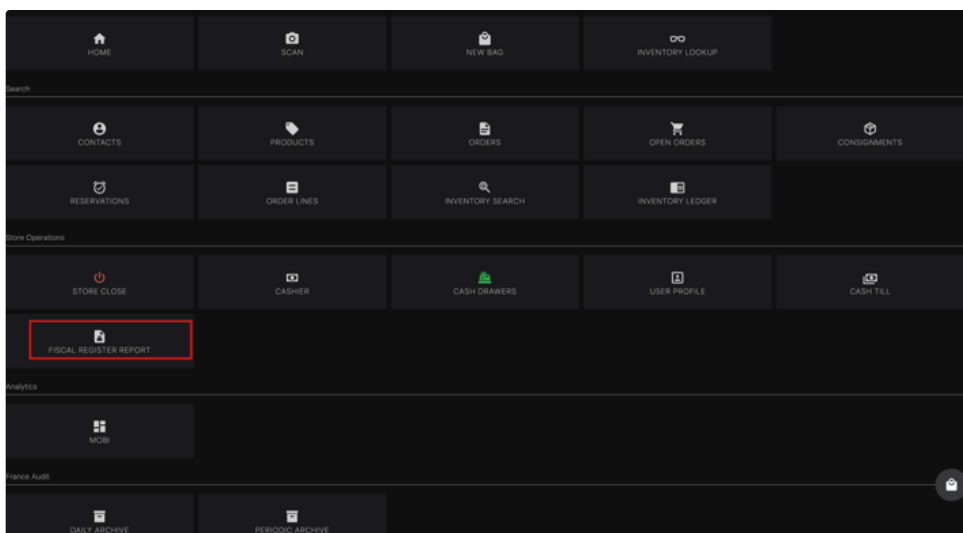
c. Click **Continue** to proceed.

2. Navigate to the FISCAL REGISTER REPORT

a. Click the **burger menu** (☰) located in the upper left corner.



b. Select **FISCAL REGISTER REPORT** from the menu to access the FISCAL REGISTER Reports list.



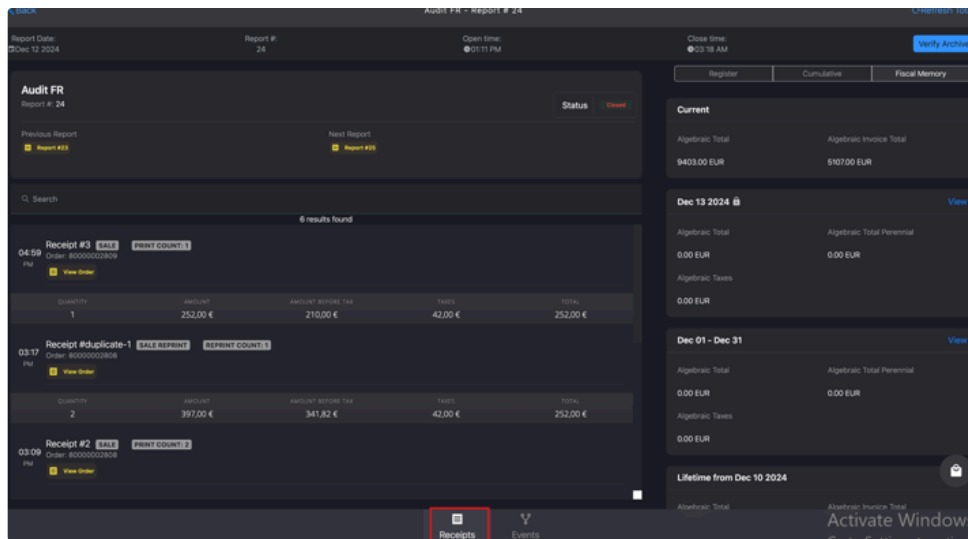
c. Click the specific report from the list.

The screenshot displays the 'Fiscal Register Reports' screen for Friday, Dec 13, 2024. It shows a list of 28 reports found. The table below summarizes the visible data for each report.

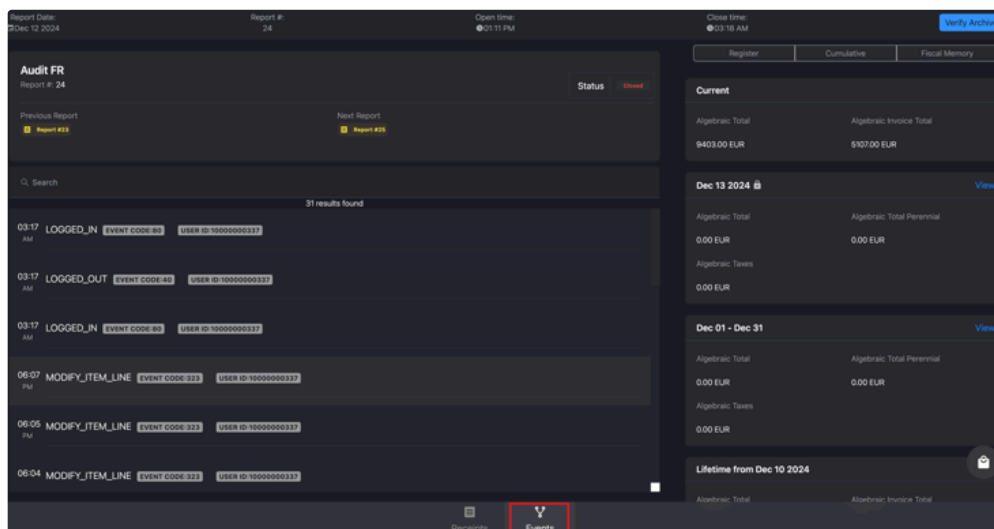
Report Name	Status	Total Sales Receipts	Total Sales Amount	Total Sales Taxes	Total Returns Receipts	Total Returns Amount	Total Returns Taxes	Total Receipts	Total Amount	Total Taxes
French Store - Test Audit V1	REPORT NUMBER 4 OPENED	0	0,00 €	0,00 €	0	0,00 €	0,00 €	0	0,00 €	0,00 €
French Store - Test Audit V1	REPORT NUMBER 3 CLOSED	0	0,00 €	0,00 €	0	0,00 €	0,00 €	0	0,00 €	0,00 €
French Store - Test Audit V1	REPORT NUMBER 2 CLOSED	2	4 718,57 €	372,43 €	0	0,00 €	0,00 €	2	4 718,57 €	372,43 €
French Store - Test Audit V1	REPORT NUMBER 1 CLOSED	3	1 050,00 €	210,00 €	0	0,00 €	0,00 €	3	1 050,00 €	210,00 €
French Store - Test Audit	REPORT NUMBER 3 OPENED	0	0,00 €	0,00 €	0	0,00 €	0,00 €	0	0,00 €	0,00 €
French Store - Test Audit	REPORT NUMBER 1 CLOSED	0	0,00 €	0,00 €	0	0,00 €	0,00 €	0	0,00 €	0,00 €

3. Fiscal Register Report Overview

a. Click **Receipts** in the bottom bar to view the list of receipts generated for each order or return processed during the archived period.



- b. Click **Events** in the bottom bar to access the types of events logged, such as fiscal events or operational actions.



4. **Fiscal Memory** section displays summarized fiscal data for specific time frames.
- **Current** : The current report consolidates real-time the fiscal data for transactions happening on the current business day.
 - **Daily**: The daily reports consolidates the fiscal data that occurred in a single business day.
 - **Monthly**: The monthly report consolidates the fiscal data that occurred for all days in a specific month.
 - **Yearly**: The yearly report consolidates all fiscal transactions for an entire calendar or fiscal year
 - **Lifetime**: The lifetime reports consolidates all fiscal activity from the date the fiscal register started operation up to the present.

Report Date: Dec 12 2024 Report #: 24 Open Time: 05:11 PM Close Time: 05:18 AM Verify Archive

Audit FR

Report #: 24 Status: Closed

Previous Report: Report #23 Next Report: Report #25

Search: 31 results found

- 03:17 AM LOGGED_IN EVENT CODE: 803 USER ID: 10000000337
- 03:17 AM LOGGED_OUT EVENT CODE: 804 USER ID: 10000000337
- 03:17 AM LOGGED_IN EVENT CODE: 803 USER ID: 10000000337
- 06:07 PM MOOPY_ITEM_LINE EVENT CODE: 323 USER ID: 10000000337
- 06:05 PM MOOPY_ITEM_LINE EVENT CODE: 323 USER ID: 10000000337
- 06:04 PM MOOPY_ITEM_LINE EVENT CODE: 323 USER ID: 10000000337

Register Cumulative Fiscal Memory

Current

Algebraic Total	Algebraic Invoice Total
9403.00 EUR	5107.00 EUR

Dec 13 2024 View

Algebraic Total	Algebraic Total Periodical
0.00 EUR	0.00 EUR

Algebraic Taxes: 0.00 EUR

Dec 01 - Dec 31 View

Algebraic Total	Algebraic Total Periodical
0.00 EUR	0.00 EUR

Algebraic Taxes: 0.00 EUR

Lifetime from Dec 10 2024

Algebraic Total: Algebraic Invoice Total

Receipts Events

Verify Archive Archive Close

France Certification Audit

Report Date: Dec 01 - Dec 31 Status: Open

Search: 7 results found

10:29 AM Receipt #reprint-invoice-1 INVOICE REPRINT REPRINT COUNT: 1
Order: 80000001886 View Order

QUANTITY	AMOUNT	AMOUNT BEFORE TAX	TAXES	TOTAL
21	5 179,00 €	4 957,80 €	162,39 €	4 826,20 €

10:28 AM Receipt #duplicate-1 SALE REPRINT REPRINT COUNT: 1
Order: 80000001886 View Order

QUANTITY	AMOUNT	AMOUNT BEFORE TAX	TAXES	TOTAL
21	5 179,00 €	4 957,80 €	162,39 €	4 826,20 €

10:27 AM Receipt #invoice-1 INVOICE PRINT COUNT: 2
Order: 80000001886

Register Cumulative Fiscal Memory

Memory

Algebraic Total	Algebraic Invoice Total
4826.20 EUR	4826.20 EUR
Algebraic Taxes	Algebraic Net Amount Before Taxes
162.39 EUR	4663.81 EUR

Daily

Dec 13 4826.20 EUR View

2024 - Jan 01 - Dec 31 View

Algebraic Total	Algebraic Invoice Total
4826.20 EUR	4826.20 EUR
Algebraic Taxes	Algebraic Net Amount Before Taxes
162.39 EUR	4663.81 EUR

Receipts Events

Back France Certification Audit - Report # Yearly Refresh Total Verify Archive Archive Close

France Certification Audit

Report Date: 2024 Jan 01 - Dec 31 Status: Open

Search: 7 results found

10:29 AM Receipt #reprint-invoice-1 INVOICE REPRINT REPRINT COUNT: 1
Order: 80000001886 View Order

QUANTITY	AMOUNT	AMOUNT BEFORE TAX	TAXES	TOTAL
21	5 179,00 €	4 957,80 €	162,39 €	4 826,20 €

10:28 AM Receipt #duplicate-1 SALE REPRINT REPRINT COUNT: 1
Order: 80000001886 View Order

QUANTITY	AMOUNT	AMOUNT BEFORE TAX	TAXES	TOTAL
21	5 179,00 €	4 957,80 €	162,39 €	4 826,20 €

10:27 AM Receipt #invoice-1 INVOICE PRINT COUNT: 2
Order: 80000001886

Register Cumulative Fiscal Memory

Memory

Algebraic Total	Algebraic Invoice Total
4826.20 EUR	4826.20 EUR
Algebraic Taxes	Algebraic Net Amount Before Taxes
162.39 EUR	4663.81 EUR

Monthly

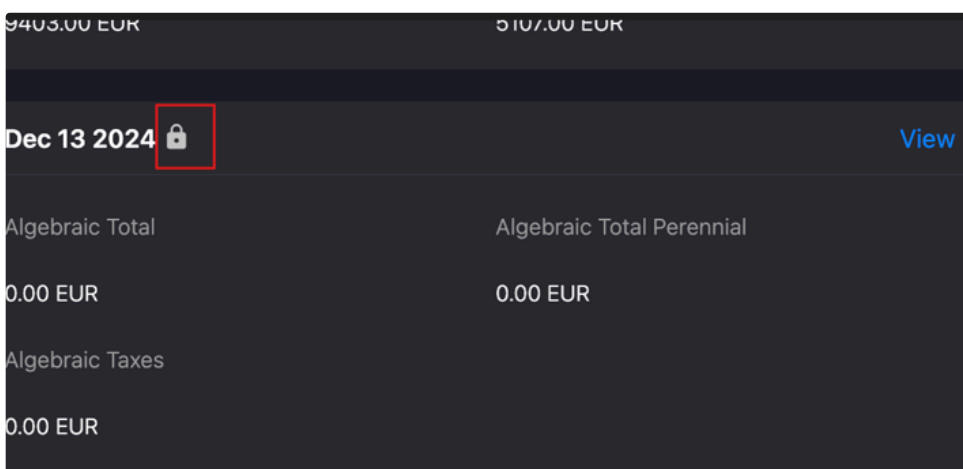
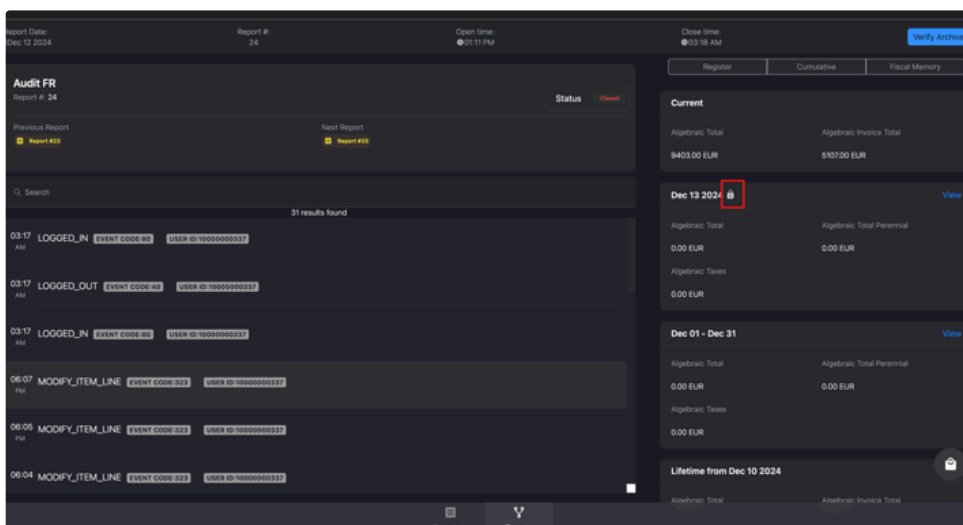
Dec 01 - Dec 31 4826.20 EUR View

Lifetime from Dec 13 2024

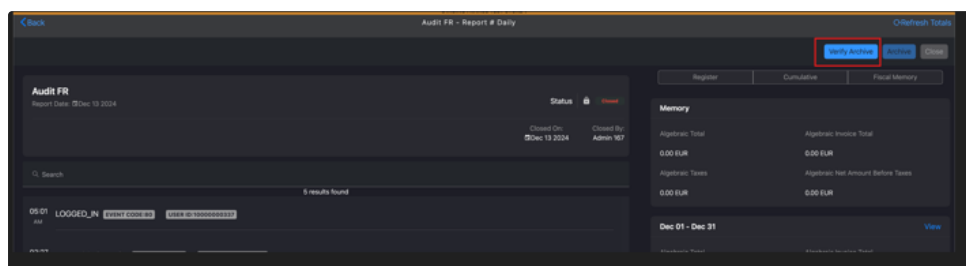
Algebraic Total	Algebraic Invoice Total
4826.20 EUR	4826.20 EUR
Algebraic Taxes	Algebraic Net Amount Before Taxes
EUR	EUR

Receipts Events

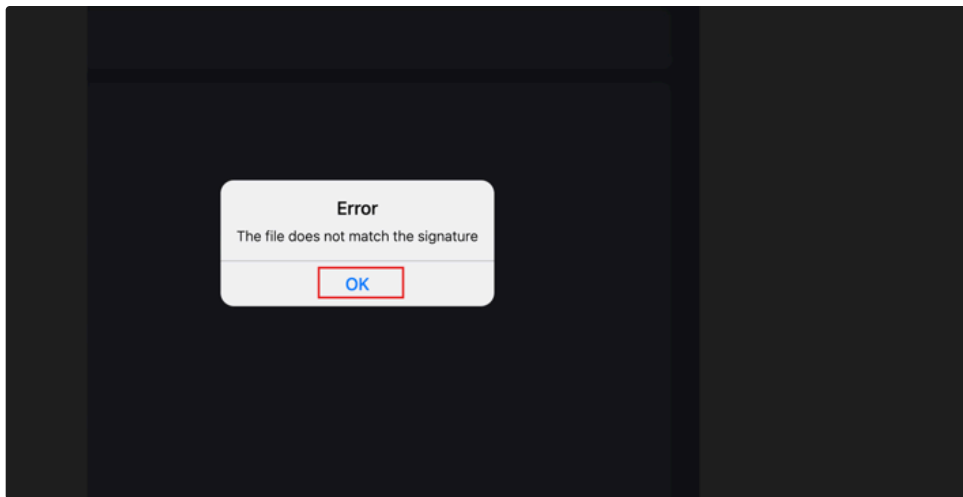
- Fiscal memory lock icon indicates that the fiscal data for that period has been finalized and cannot be modified.



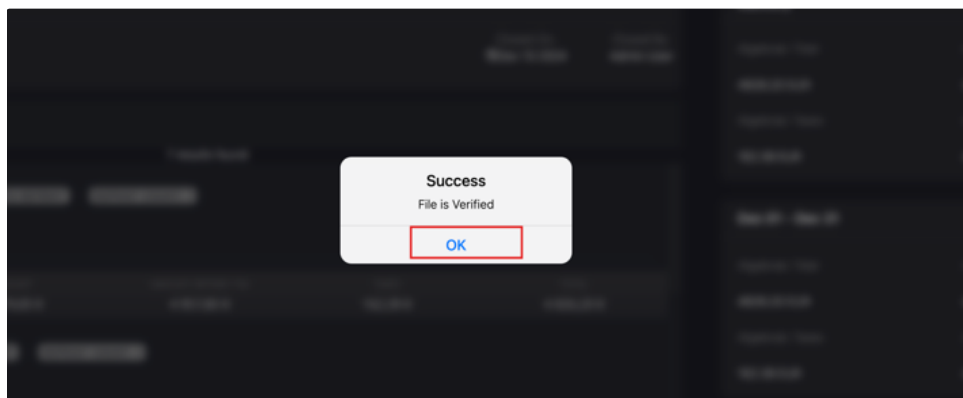
5. **Verify Archive** button is used to authenticate archived fiscal reports.



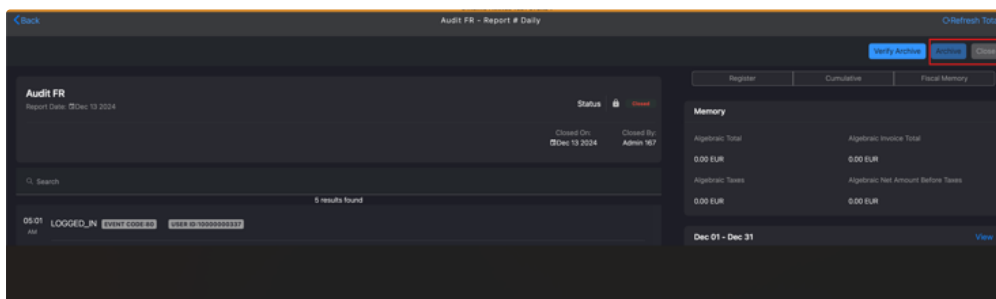
- If the **digital signature** does not match, an **Error** pop-up will be displayed.



- If the uploaded file is **correct**, a **Success** pop-up will be displayed stating **File is Verified**.



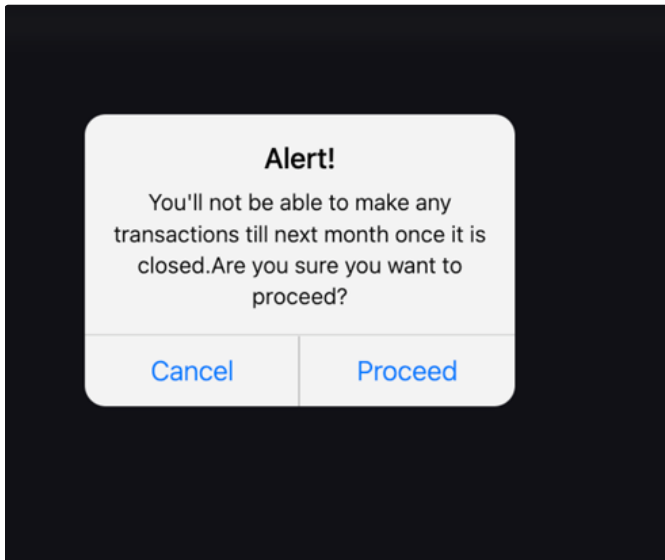
- Archive and Close** buttons are disabled when the memory is already closed to prevent further changes or actions on finalized fiscal data.



7. Warning Pop-up

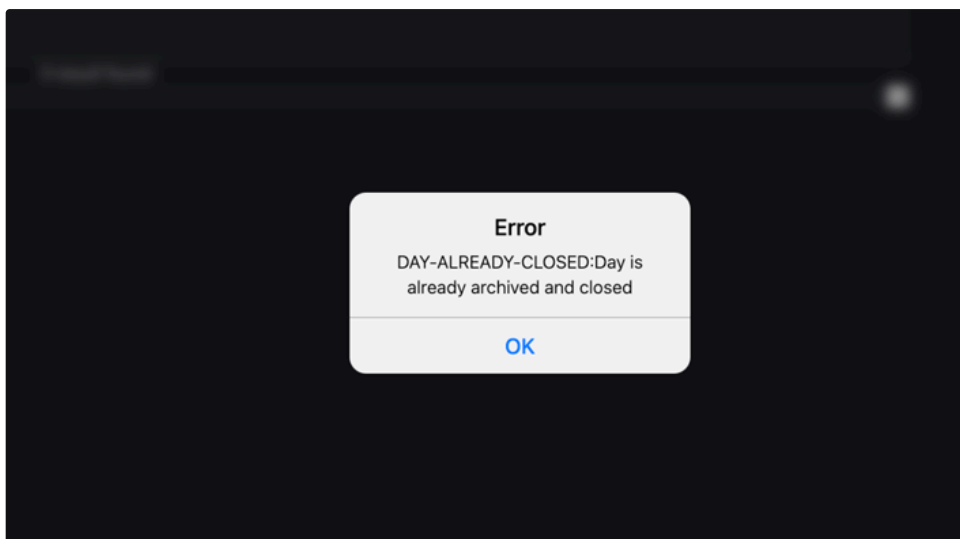
- When you click the **Close button** of any memory, a **warning pop-up** will appear, notifying the user about the restrictions that will be applied:

- **Day Memory:** If clicked on **day memory**, users will not be able to place any transactions until the next day.
- **Month Memory:** If clicked on **month memory**, users will not be able to place any transactions until the start of the next month.
- **Year Memory:** If clicked on **year memory**, users will not be able to place any transactions until the next year.



Note: This ensures that no transactions can occur during closed periods, maintaining the integrity of the fiscal data and ensuring proper compliance for each period.

- When you click the **Close button** and the day is already archived and closed, an **Error** pop-up will be displayed, as no further actions can be performed once the day is finalized.



Invoicing

An **Invoice** is a physical or digital record issued by the retailer to a customer that includes all product related details, costs and type of payment, taxes, store address, customer address, customer name.

- [Print Invoice](#)

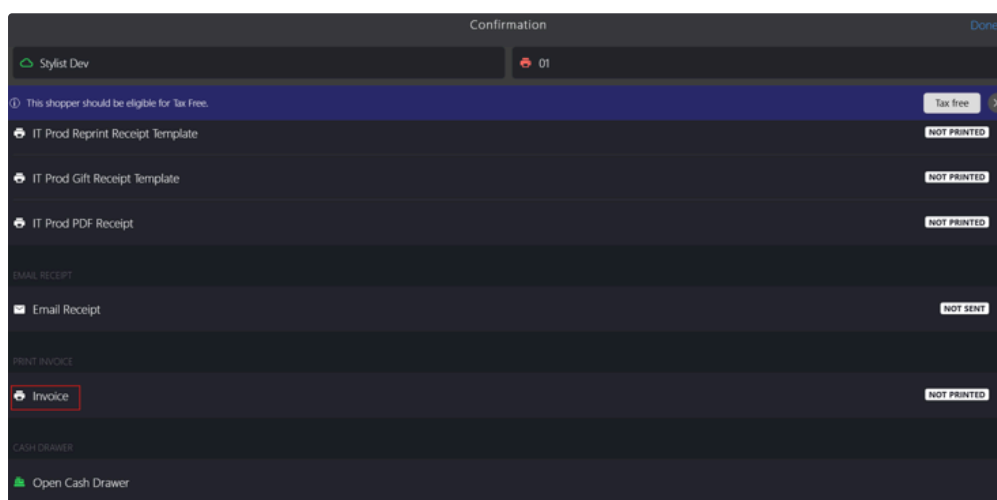
Print Invoice

Introduction

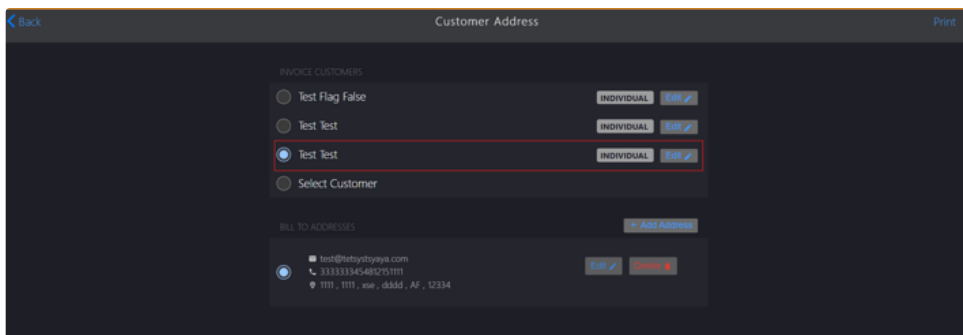
Print Invoice feature allows the user to generate a physical copy of the invoice from the XY POS system. The invoice printing option is enabled only after the payment has been processed successfully, and a receipt has been generated. This feature facilitates efficient and transparent post-transaction communication, enhancing customer satisfaction.

Steps to Print Invoice

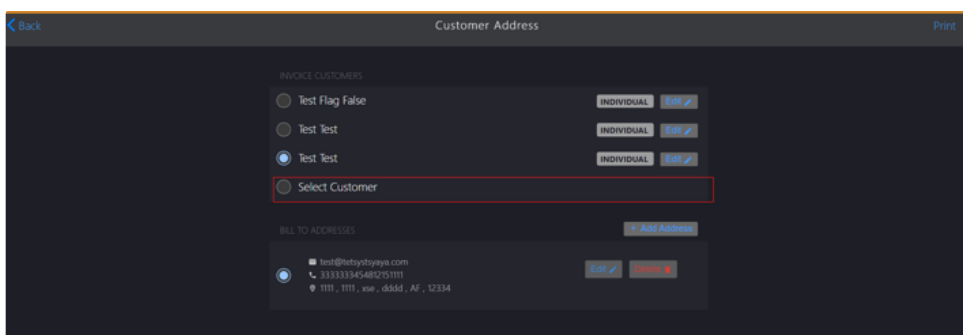
1. Click **Invoice** to open **Custom Address** page.



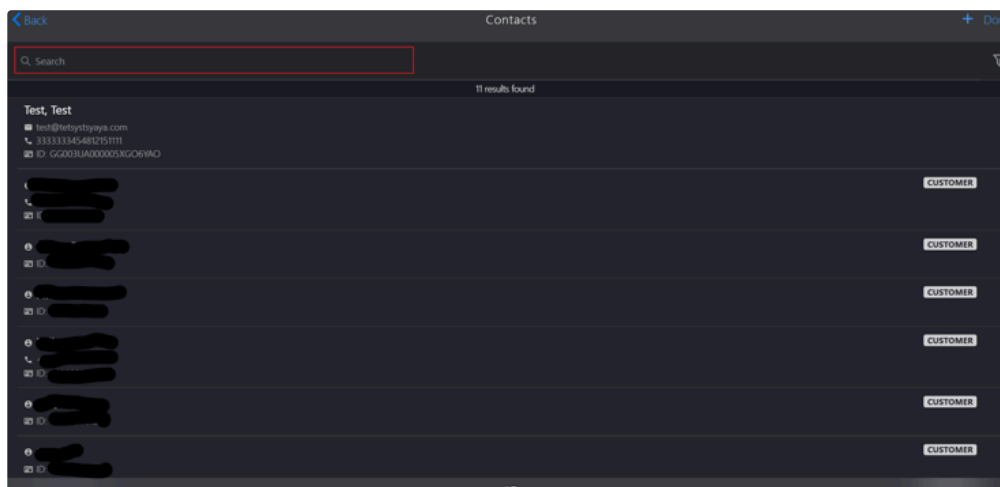
2. Select customer in the **INVOICE CUSTOMERS** section.
 - a. If the customer is listed, select the existing customer from the corresponding radio button next to the specific customer's name.



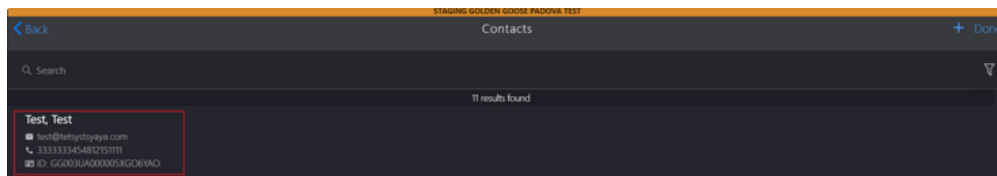
b. If the customer is not listed, click **Select Customer**.



i. Search for the customer in the **Contacts** search box.

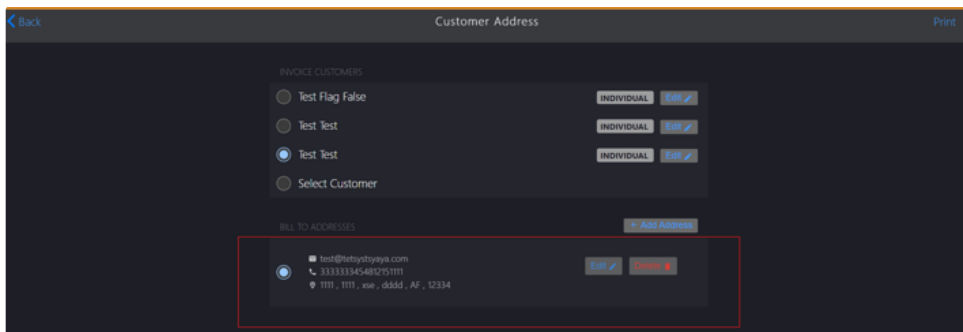


ii. Select the customer from the search list.

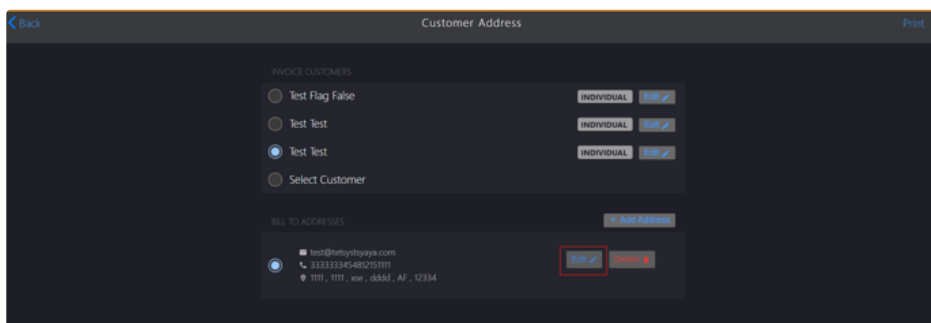


3. Select the address in **BILL TO ADDRESS** section.

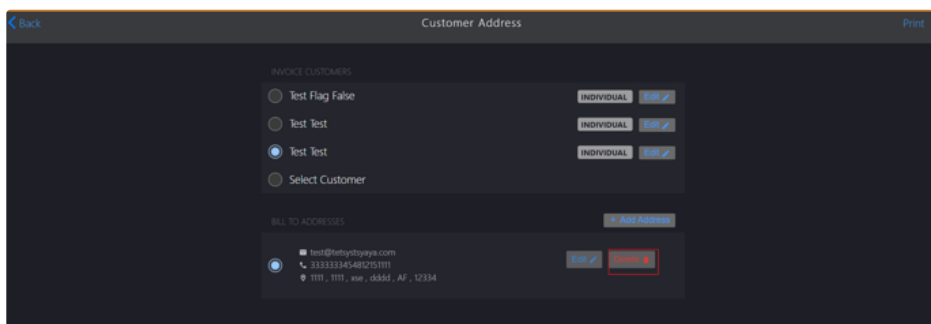
a. If the billing address is listed, select the address.



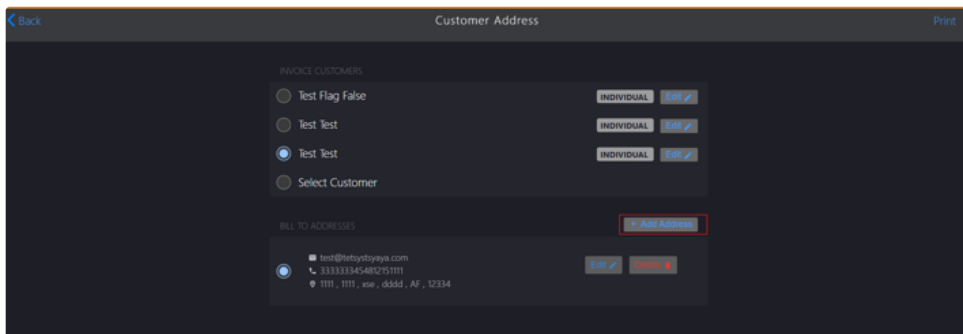
i. If the existing address need to be updated, click **Edit**.



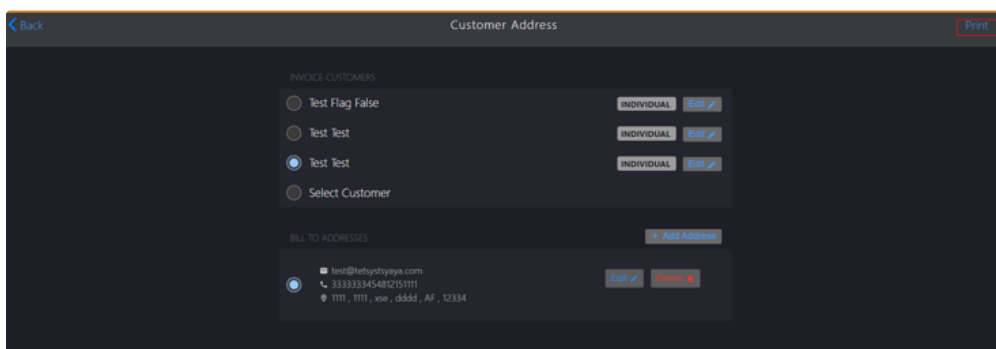
ii. If the existing address need to be deleted, click **Delete**.



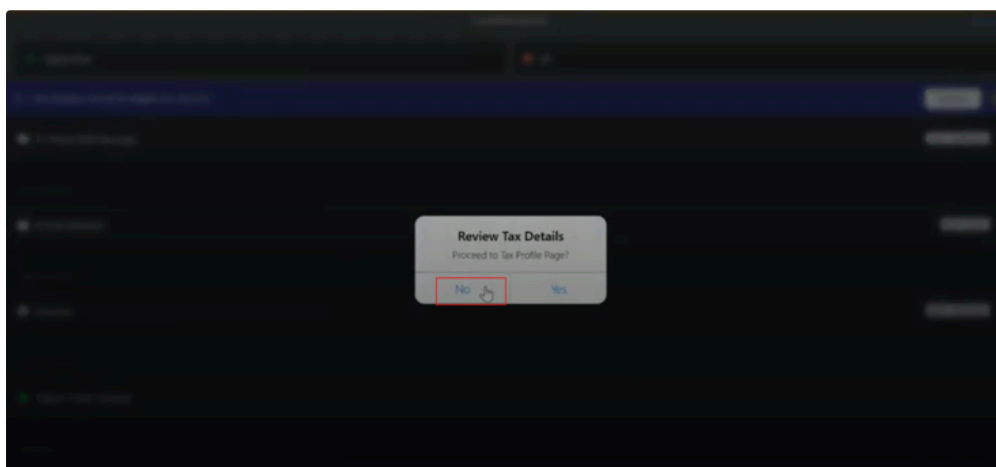
b. If the billing address is not available, click [+Add Address](#).

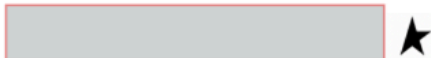


4. Click **Print**.



5. Click **No** in **Review Tax Details** dialog box to skip the review and generate a physical copy of the invoice. .





FATTURA

SPA Test
 Via Privata Ercole Marelli, 10 Via S. Fermo, 42,
 MILANO Italy IT 35137 PADOVA IT
 ID imposta: 08347090964 IT

Negozio: **Test Test**
 Numero Documento: **10255_1_25_IN_100047** Cliente: **Test Test**
 Data Documento: **09/01/25** **GG003UA000005XGO6YAO**
 Numero Transazione: **10255T25000889** **1111, 1111, xse, dddd, AF, 12334**
 Data Transazione: **09/01/25** Codice imposta:
 N. Ricevuta Fiscale: **-0-PAD01TEST** Codice di identificazione:

Descrizione Articolo	ID Articolo	Prezzo Unitario Netto	Prezzo Unitario	Quantità	Importo Sconto	Aliquota imposta	Importo imposta	Importo
SUPER-STAR LEATHER UPPER AND LEST GLITTER STAR SUEDE HEELWHITE/GOLD Notes:	GWF00101_F00351_5_10272_34	442.62	540.00	1	0.00	22.00 %	97.38	540.00

Cash **540.00**

	Aliquota imposta	Importo imponibile	Importo imposta	Totale
Standard	22.00 %	442.62	97.38	540.00
Total	22.00 %	442.62	97.38	540.00

Page 1 / 1

Global Blue Tax-Free

Overview

Tax-free shopping allows international tourists to purchase goods in their destination country without paying the value-added tax (VAT) that applies to local residents. In some cases, refund forms are automatically issued at the point of sale, and, in other cases, tourists must save their receipts and request refunds via VAT refund desks, self-service kiosks, or online.

We streamline and digitize the VAT refund process directly at the checkout using integrated tax-free shopping software from **Global Blue**.

This system automatically verifies the source of your credit card and generates a tax-free form. As a result, you can easily validate the form at the airport and submit it to the service provider.

Tax Free Scenarios

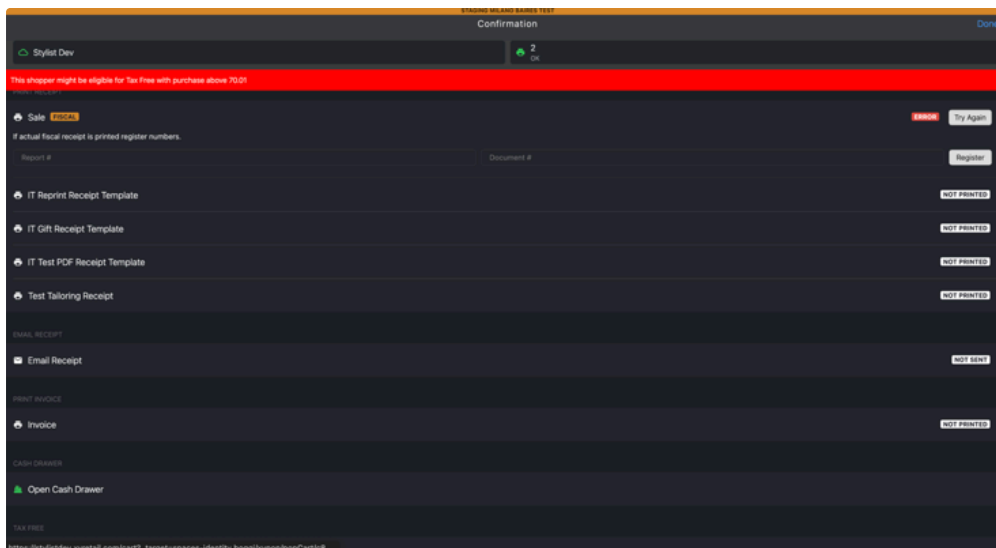
The **Tax Free** feature supports the following scenario:

- [Applying Tax-Free to Sales Order with Global Blue](#)
 - [Voiding a Global Blue Tax-Free Applied to a Sales Order](#)
 - [Voiding Global Blue Tax-Free Status on Return Order](#)
 - [Verifying the VOID number for a Return Order](#)
-

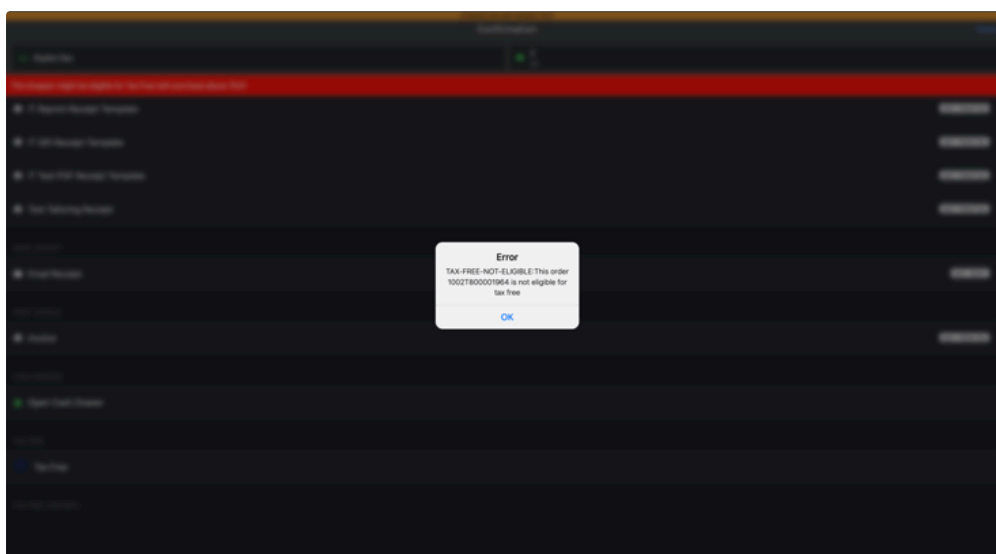
Tax Free Eligibility

Tax-free eligibility is determined solely by the purchase amount, which must meet the specified threshold.

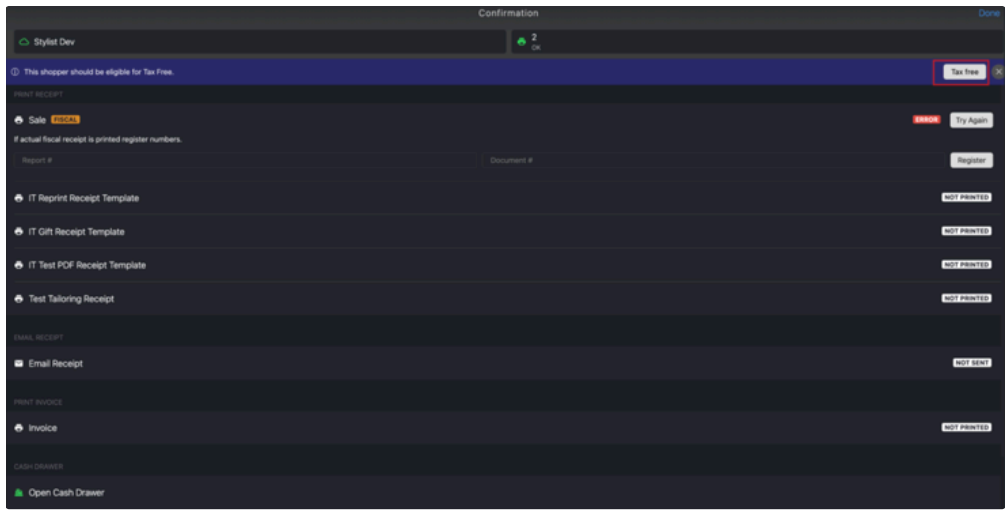
- If an order is below the tax-free threshold, a red notification will appear stating, "This shopper may be eligible for TAX FREE shopping with a purchase above [threshold value]."



- An **Error** dialog box appears when the notification is clicked.



- If an order is equal or above the tax-free threshold, a blue notification will appear stating, "This shopper should be eligible for Tax Free." with a **Tax free** button.



Applying Tax-Free to Sales Order with Global Blue

Introduction

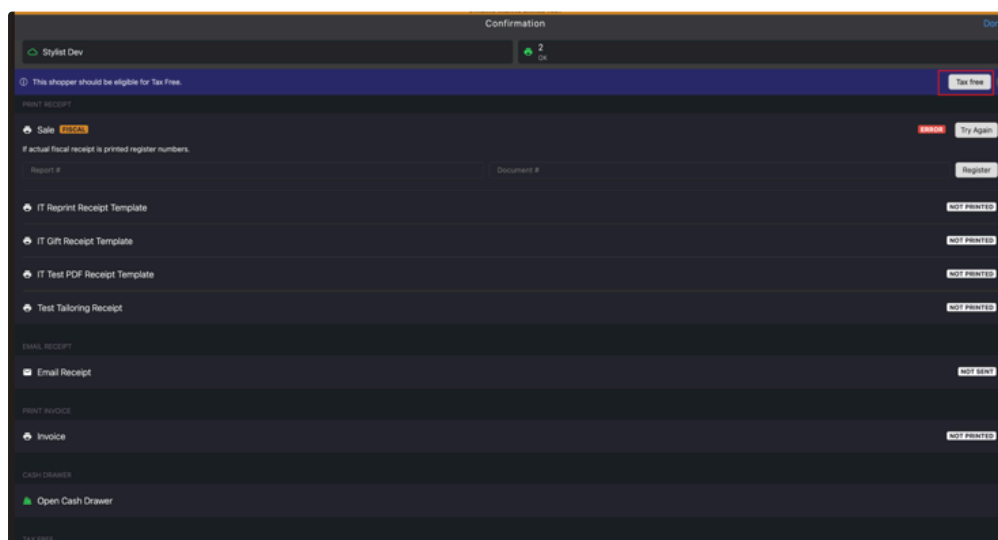
This topic explains how to apply tax-free via **Global Blue** after the payment has been processed successfully, and a receipt has been generated, provided the purchase meets the eligibility criteria.

Global Blue Overview

Global Blue Tax-Free allows store staff to generate a tax-free invoice for the customers from the **XY POS** system plugin through the **Global Blue** page. The **Tax Free** feature is automatically enabled after the payment has been processed successfully, and a receipt is generated. This feature facilitates efficient and transparent post-transaction communication, enhancing customer satisfaction.

Steps to Apply Sales Order Tax-Free

1. Click **Tax free** to access the **Global Blue** page.



2. Enter the following Global Blue sections:

- a. If the customer is linked with sales cart follow this procedure:

i. TRAVELLER

• PERSONAL INFO

The screenshot displays the 'TRAVELLER' form in the XY Retail POS system. The form is organized into several sections:

- PERSONAL INFO:** This section is highlighted with a red box and includes:
 - DOCUMENT TYPE: Passport (selected)
 - DOCUMENT NO.:
 - DOCUMENT ISSUING COUNTRY: (dropdown menu)
 - GLOBAL BLUE IDENTIFIER:
 - FIRST NAME and LAST NAME: (input fields)
 - DATE OF BIRTH: (dd/mm/yyyy format)
- CONTACT INFO:**
 - COUNTRY/REGION OF RESIDENCE: (dropdown menu)
 - PERMANENT ADDRESS:
 - CITY and ZIP:
 - EMAIL:
 - MOBILE NUMBER:
- PURCHASE:** A table with columns: DESCRIPTION, QTY, GROSS AMT., VAT RATE.

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
		PURCHASE TOTAL	VAT TOTAL
		89.00	16.05
- REFUND:**
 - SERVICE INFO: COUPON, SERVICE (Flex Refund 125)
 - REFUND METHOD: Payment Card (selected)
 - CARD NUMBER:
 - EXP. MONTH and EXP. YEAR:
- SUMMARY:**
 - PURCHASE: 89.00
 - VAT: 16.05
 - REFUND: 10.50
 - Payment Card
 - ISSUE button

- **DOCUMENT TYPE:** The **Passport** option is selected by default.
- **DOCUMENT NO.:** Enter the customer's passport number.
- **DOCUMENT ISSUING COUNTRY:** Select the respective country from the dropdown list.

Note: After you update the **Document issuing country** and **Document no.**, the following fields are automatically populated:

- **Global Blue identifier**
- **First name**
- **Last name**
- **Date of birth**

ii. CONTACT INFO:

TRAVELLER

PERSONAL INFO

DOCUMENT TYPE: Passport | DOCUMENT NO.: | COUNTRY/REGION OF RESIDENCE: -- Please select --

DOCUMENT ISSUING COUNTRY: -- Please select -- | PERMANENT ADDRESS: | CITY: | ZIP: |

GLOBAL BLUE IDENTIFIER: | EMAIL: | MOBILE NUMBER: |

FIRST NAME: | LAST NAME: | DATE OF BIRTH: dd/mm/yyyy

PURCHASE

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
PURCHASE TOTAL		89.00	VAT TOTAL 16.05

REFUND

SERVICE INFO: COUPON: | SERVICE: Flex Refund 12%

REFUND METHOD: REFUND: Payment Card | CARD NUMBER: | EXP. MONTH: | EXP. YEAR: |

SUMMARY

TRAVELLER

PURCHASE: 89.00 | 16.05 VAT

REFUND: 10.50 | Payment Card

ISSUE

After you update the **Document issuing country** and **Document no.**, the following fields are automatically populated:

- **COUNTRY/REGION OF RESIDENCE**
- **EMAIL** or **MOBILE NUMBER**

iii. PURCHASE Section

PURCHASE

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
PURCHASE TOTAL		89.00	VAT TOTAL 16.05

- The system automatically updates the following mandatory fields:
 - **DESCRIPTION**
 - **QTY**
 - **GROSS AMT**

- VAT RATE

iv. REFUND Section

The screenshot shows the XY Retail POS interface with the following sections:

- TRAVELLER**
 - PERSONAL INFO**: Document Type (Passport), Document No., Document Issuing Country, Global Blue Identifier, First Name, Last Name, Date of Birth (dd/mm/yyyy).
 - CONTACT INFO**: Country/Region of Residence, Permanent Address, City, ZIP, Email, Mobile Number.
- PURCHASE**

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
PURCHASE TOTAL		89.00	VAT TOTAL 16.05
- REFUND** (highlighted with a red box)
 - SERVICE INFO**: Country, Service (Flex Refund 12%).
 - REFUND METHOD**: Refund (Payment Card), Card Number, Exp. Month, Exp. Year.
- SUMMARY** (right sidebar)
 - TRAVELLER
 - PURCHASE: 89.00, 16.05 VAT
 - REFUND: 10.50, Payment Card
 - ISSUE button

- **SERVICE INFO**

- The system automatically updates the **Service** field.

- **REFUND METHOD**

- **REFUND**: Select the preferred refund method from the dropdown list.

b. If the customer is not linked with sales cart follow this procedure:

i. TRAVELLER

- **PERSONAL INFO**

TRAVELLER

PERSONAL INFO

DOCUMENT TYPE: **Passport** | DOCUMENT NO.: |

DOCUMENT ISSUING COUNTRY: -- Please select --

GLOBAL BLUE IDENTIFIER

FIRST NAME: | LAST NAME: |

DATE OF BIRTH: dd/mm/yyyy

CONTACT INFO

COUNTRY/REGION OF RESIDENCE: -- Please select --

PERMANENT ADDRESS

CITY: | ZIP: |

EMAIL: |

MOBILE NUMBER

PURCHASE

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
		PURCHASE TOTAL	VAT TOTAL
		89.00	16.05

REFUND

SERVICE INFO

COUPON: |

SERVICE: **Flax Refund 12%**

REFUND METHOD

REFUND: **Payment Card**

CARD NUMBER: |

EXP. MONTH: | EXP. YEAR: |

SUMMARY

TRAVELLER

PURCHASE: 89.00

VAT: 16.05

REFUND: 10.50

Payment Card

ISSUE

- **DOCUMENT TYPE:** The **Passport** option is selected by default.
- **DOCUMENT NO.:** Enter the customer's passport number.
- **DOCUMENT ISSUING COUNTRY:** Select the respective country from the dropdown list.
- **Global Blue identifier :** Country/Passport number for example, AUS/12412G.
- **First name:** Enter the customer's first name as per the passport.
- **Last name:** Enter the customer's last name as per the passport.
- **Date of birth:** Enter the customer's date of birth.

ii. CONTACT INFO:

TRAVELLER

PERSONAL INFO

DOCUMENT TYPE: **Passport** | DOCUMENT NO.: |

DOCUMENT ISSUING COUNTRY: -- Please select --

GLOBAL BLUE IDENTIFIER

FIRST NAME: | LAST NAME: |

DATE OF BIRTH: dd/mm/yyyy

CONTACT INFO

COUNTRY/REGION OF RESIDENCE: -- Please select --

PERMANENT ADDRESS

CITY: | ZIP: |

EMAIL: |

MOBILE NUMBER

PURCHASE

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
		PURCHASE TOTAL	VAT TOTAL
		89.00	16.05

REFUND

SERVICE INFO

COUPON: |

SERVICE: **Flax Refund 12%**

REFUND METHOD

REFUND: **Payment Card**

CARD NUMBER: |

EXP. MONTH: | EXP. YEAR: |

SUMMARY

TRAVELLER

PURCHASE: 89.00

VAT: 16.05

REFUND: 10.50

Payment Card

ISSUE

- **COUNTRY/REGION OF RESIDENCE:** Select the appropriate country or region from the dropdown list.
- **EMAIL:** Enter the customer's email address.
- **MOBILE NUMBER:** Enter the customer's mobile phone number.

Note: Either the **EMAIL** or **MOBILE NUMBER** field must be added.

iii. PURCHASE Section

The screenshot shows the XY Retail POS interface with the following sections:

- TRAVELLER**
 - PERSONAL INFO:** DOCUMENT TYPE (Passport), DOCUMENT NO., DOCUMENT ISSUING COUNTRY, GLOBAL BLUE IDENTIFIER, FIRST NAME, LAST NAME, DATE OF BIRTH.
 - CONTACT INFO:** COUNTRY/REGION OF RESIDENCE, PERMANENT ADDRESS, CITY, ZIP, EMAIL, MOBILE NUMBER.
- SUMMARY:** TRAVELLER, PURCHASE (89.00, 16.05 VAT), REFUND (10.50, Payment Card), and an **ISSUE** button.
- PURCHASE:** A table with columns: DESCRIPTION, QTY, GROSS AMT., and VAT RATE.

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
PURCHASE TOTAL		89.00	16.05
- REFUND:**
 - SERVICE INFO:** COUNTRY, SERVICE (Flex Refund 12%).
 - REFUND METHOD:** REFUND (Payment Card), CARD NUMBER, EXP. MONTH, EXP. YEAR.

- **DESCRIPTION:** Enter the product name.
- **QTY:** Enter product quantity.
- **GROSS AMT:** Enter the total gross amount for the product.
- **VAT RATE:** Enter the applicable VAT rate for the product.

iv. REFUND Section

TRAVELLER

PERSONAL INFO

DOCUMENT TYPE: Passport | DOCUMENT NO.: [] | COUNTRY/REGION OF RESIDENCE: []

DOCUMENT ISSUING COUNTRY: [] | PERMANENT ADDRESS: []

GLOBAL BLUE IDENTIFIER: [] | CITY: [] | ZIP: []

FIRST NAME: [] | LAST NAME: [] | EMAIL: []

DATE OF BIRTH: [] | MOBILE NUMBER: []

PURCHASE

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
PURCHASE TOTAL		89.00	VAT TOTAL 16.05

REFUND

SERVICE INFO

COUPON: [] | SERVICE: Flex Refund 12%

REFUND METHOD

REFUND: Payment Card | CARD NUMBER: [] | EXPIRY: []

SUMMARY

TRAVELLER

PURCHASE: 89.00 | 16.05 VAT

REFUND: 10.50 | Payment Card

ISSUE

- **SERVICE INFO**

- **Service** : Select the preferred service from the dropdown list.

- **REFUND METHOD**

- **REFUND**: Select the preferred refund method from the dropdown list.

3. Click **ISSUE** after filling all the mandatory fields.

TRAVELLER

PERSONAL INFO

DOCUMENT TYPE: Passport | DOCUMENT NO.: 12412G | COUNTRY/REGION OF RESIDENCE: 36-AUSTRALIA

DOCUMENT ISSUING COUNTRY: AUS-AUSTRALIA | PERMANENT ADDRESS: []

GLOBAL BLUE IDENTIFIER: AUS12412G | CITY: [] | ZIP: []

FIRST NAME: asaf | LAST NAME: faefafa | EMAIL: awfaedot@efcs.com

DATE OF BIRTH: 15/08/1990 | MOBILE NUMBER: +61

PURCHASE

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
PURCHASE TOTAL		89.00	VAT TOTAL 16.05

REFUND

SERVICE INFO

COUPON: [] | SERVICE: Flex Refund 12%

REFUND METHOD

REFUND: Cash

SUMMARY

TRAVELLER: 12412G - faefafa, asaf | as-af@efcs

PURCHASE: 89.00 | 16.05 VAT

REFUND: 10.50 | Cash

ISSUE

PLEASE CHECK IF THE HIGHLIGHTED DETAILS ARE CORRECT.

PERSONAL INFO

DOCUMENT TYPE: Passport
DOCUMENT NO.: 12412G
DOCUMENT ISSUING COUNTRY: AUS-AUSTRALIA
GLOBAL BLUE IDENTIFIER: AUS/12412G
FIRST NAME: asdfad
LAST NAME: feefwefw
DATE OF BIRTH: 11/08/1990

CONTACT INFO

COUNTRY/REGION OF RESIDENCE: 36-AUSTRALIA
PERMANENT ADDRESS:
CITY: ZIP:
EMAIL: asdfad@feefwefw.com
MOBILE NUMBER: +61

SUMMARY

TRAVELLER: 12412G - feefwefw, asdfad
PURCHASE: 89.00
16.05 VAT
REFUND: 10.50
Cash

PURCHASE

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
PURCHASE TOTAL		89.00	
VAT TOTAL		16.05	

REFUND

SERVICE INFO:
COUPON:
SERVICE: Flex Refund 12%

OFFRI IL RIMBORSO SU CARTA, IL TURISTA LO POTRÀ ANCHE CANCELLARE OPPURE PRENDERE IN NUOVO (EMETTERE)

REFUND: Cash

ISSUE

4. Click **STANDARD REFUND** in the **FAST REFUND** dialog box to generate **Doc ID** number.

PLEASE CHECK IF THE HIGHLIGHTED DETAILS ARE CORRECT.

PERSONAL INFO

DOCUMENT TYPE: Passport
DOCUMENT NO.: 12412G
DOCUMENT ISSUING COUNTRY: AUS-AUSTRALIA
GLOBAL BLUE IDENTIFIER: AUS/12412G
FIRST NAME: asdfad
LAST NAME: feefwefw
DATE OF BIRTH: 11/08/1990

CONTACT INFO

COUNTRY/REGION OF RESIDENCE: 36-AUSTRALIA
PERMANENT ADDRESS:
CITY: ZIP:
EMAIL: asdfad@feefwefw.com
MOBILE NUMBER: +61

SUMMARY

TRAVELLER: 12412G - feefwefw, asdfad
PURCHASE: 89.00
16.05 VAT
REFUND: 10.50
Cash

PURCHASE

DESCRIPTION	QTY	GROSS AMT.	VAT RATE
1 SHIRTS	1	89.00	22
PURCHASE TOTAL		89.00	
VAT TOTAL		16.05	

REFUND

SERVICE INFO:
COUPON:
SERVICE: Flex Refund 12%

OFFRI IL RIMBORSO SU CARTA, IL TURISTA LO POTRÀ ANCHE CANCELLARE OPPURE PRENDERE IN NUOVO (EMETTERE)

REFUND: Cash

FAST REFUND

GIVE YOUR CUSTOMERS A BETTER SERVICE, WITH A FAST REFUND TO VISA, CUP, MASTER. ENTER VALID PAYMENT CARD DETAILS.

REFUND: Fast Refund 12%

REFUND: Payment Card

CARD NUMBER:
EXP. MONTH: EXP. YEAR:

VES 79.8.641

STANDARD REFUND (highlighted)

FAST REFUND

ISSUE

PLEASE CHECK IF THE HIGHLIGHTED DETAILS ARE CORRECT.

PERSONAL INFO

DOCUMENT TYPE: Passport
DOCUMENT NO.: 123456
COUNTRY/REGION OF RESIDENCE: 36-AUSTRALIA
DOCUMENT ISSUING COUNTRY: AUS-AUSTRALIA
GLOBAL BLUE IDENTIFIER: AUS/123456
FIRST NAME: Jack
LAST NAME: Taylor
DATE OF BIRTH: 11/08/1990

CONTACT INFO

PERMANENT ADDRESS

PURCHASE

DESCRIPTION: 1 SHIRTS

REFUND

REFUND AMT: 10.50
CASH

SUMMARY

TRAVELLER: 123456 - jack.taylor@globalblue.com
PURCHASE: 85.00
16.05 VAT
REFUND: 10.50
Cash

SUCCESS

ISSUING WAS SUCCESSFUL

DOC ID: 1234567890123456

THE ISSUING CLIENT WILL BE CLOSED BY CLICKING ON THE CLOSE BUTTON.

CLOSE

GLOBAL BLUE RECEIVED BY CAROL G. TAVAZZI LE POTRE AVERE ALCUNI CAMBIAPI (OPPURE PERDI) DI BUCHE (MONTAGNE)

REFUND: 10.50
CASH

5. Click **CLOSE** in the **SUCCESS** dialog box to generate the Tax Free form.

Tax Free Form Type Example

Long Thermal Receipt

Global Blue

ITALY
ATTENTION!!!
TAX FREE FORM

(€) **YOUR REFUND AMOUNT**
EUR

Doc ID 1234567890123456

Black & White A4 Type Form

Global Blue
ITALY Tax Free Form

Doc ID 1234567890123456

THIS TAX FREE FORM IS THE SOLE PROPERTY OF GLOBAL BLUE. REFUND ONLY BY GLOBAL BLUE OR ITS AUTHORIZED REFUND PARTNERS.
Global Blue Italia S.p.A. - Via Cavour 10 - 00187 Roma (RM) - Tel: +39 06 6789 1234 - Fax: +39 06 6789 5678
Global Blue Italia S.p.A. - Via Cavour 10 - 00187 Roma (RM) - Tel: +39 06 6789 1234 - Fax: +39 06 6789 5678
Global Blue Italia S.p.A. - Via Cavour 10 - 00187 Roma (RM) - Tel: +39 06 6789 1234 - Fax: +39 06 6789 5678
Global Blue Italia S.p.A. - Via Cavour 10 - 00187 Roma (RM) - Tel: +39 06 6789 1234 - Fax: +39 06 6789 5678

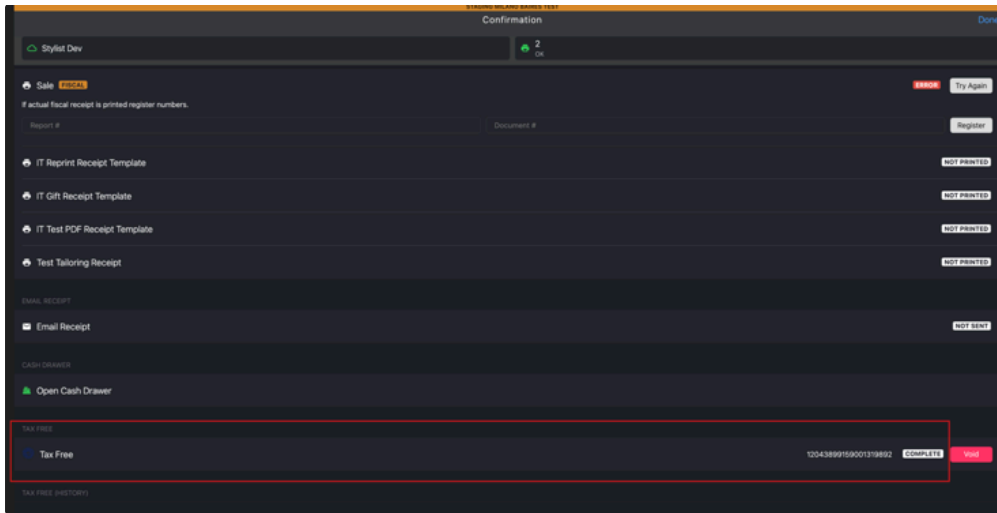
Blue Half A4 Or A4 Type Form

TaxFreeForm

Doc ID 1234567890123456

THIS TAX FREE FORM IS THE SOLE PROPERTY OF GLOBAL BLUE. REFUND ONLY BY GLOBAL BLUE OR ITS AUTHORIZED REFUND PARTNERS.

6. Verify that the generated DOC ID number is updated in the **TAX FREE** section of the **Confirmation** page.



Related Articles

[Doc ID number](#)

Voiding a Global Blue Tax-Free Applied to a Sales Order

Introduction

This topic explains how to void a tax-free benefit that has been applied to a sales order. The voiding process ensures compliance with tax regulations.

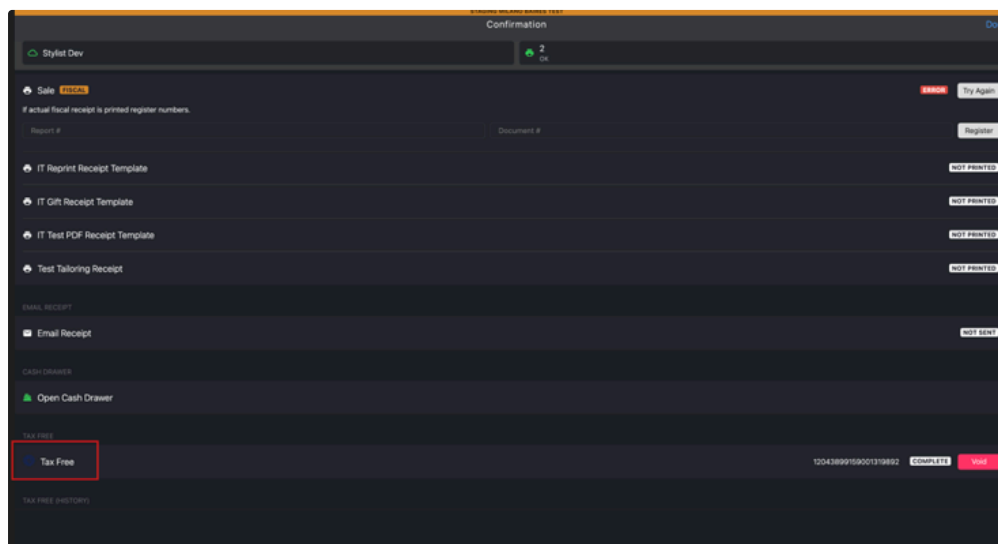
Voiding Scenarios

Voiding a tax-free sales order is necessary in the following scenarios:

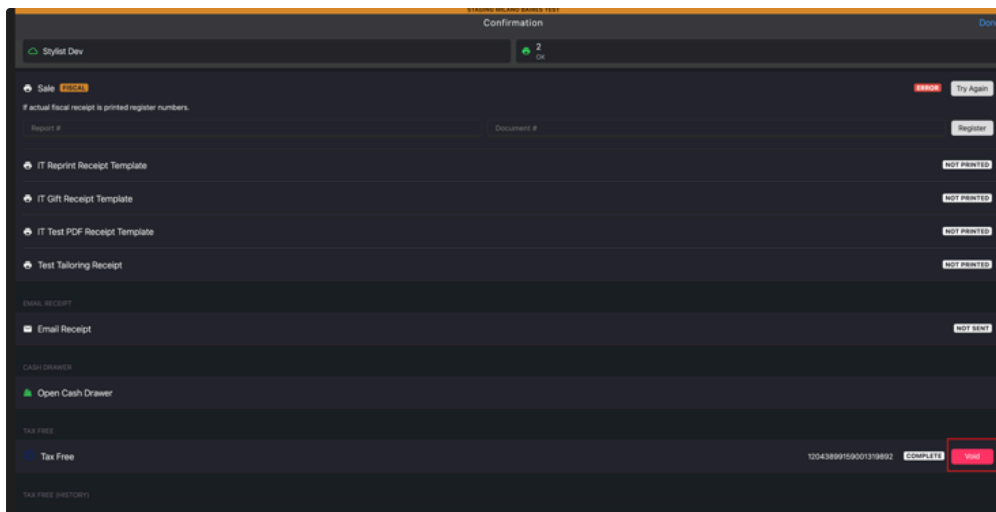
- Error in Tax-Free application, for example, incorrect customer information or incorrect eligibility criteria.
 - When there is a change in the order details that invalidates the tax-free claim.
-

Steps to Apply Void to a Tax-Free Applied Sales Order

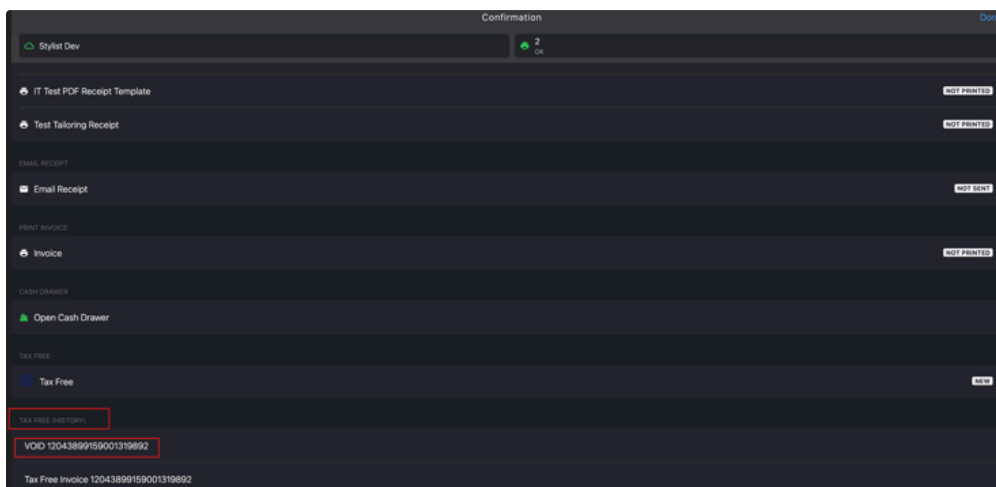
1. Go to **TAX FREE** in the Confirmation page



2. Click **Void** to cancel the applied tax-free.



3. Go to **Tax Free (History)** to verify the generated VOID number.



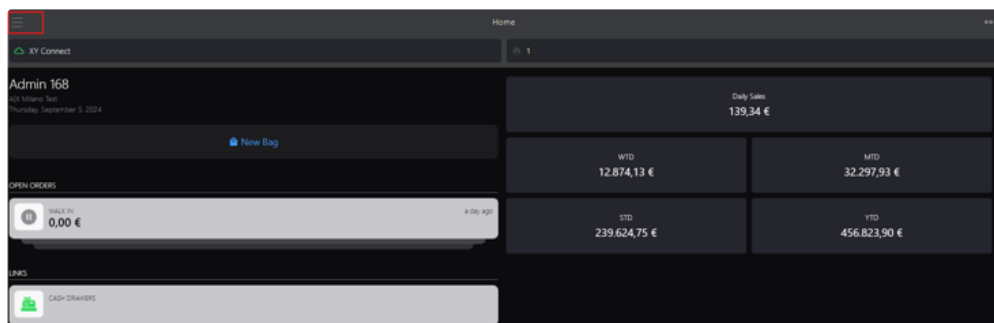
Voiding Global Blue Tax-Free Status on Return Order

Introduction

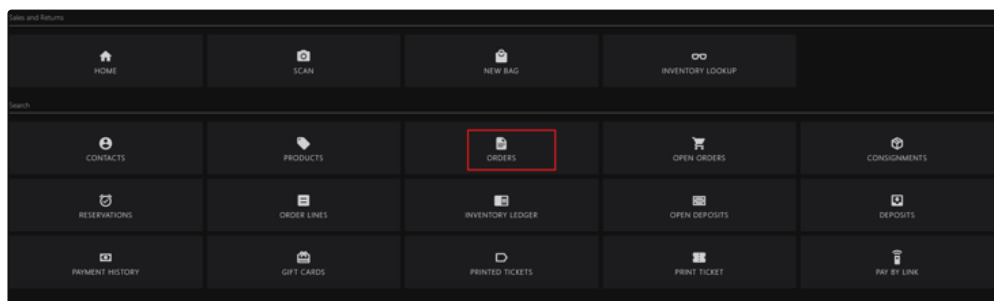
This topic explains how to void tax-free when processing a return order.

Steps to Void Tax-Free Status on Return Order

1. Click the burger menu.

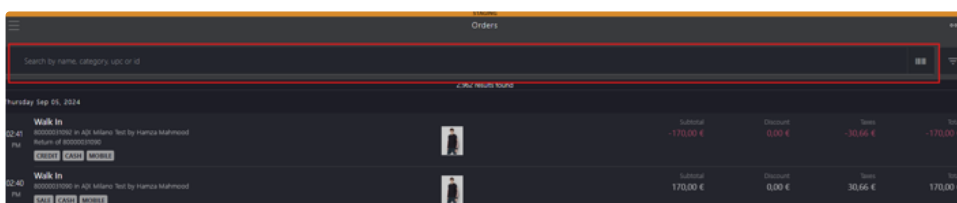


2. Click **ORDERS**.



3. You can search the order id using following options:

- a. For an order with reference, initiate new search in the search box:

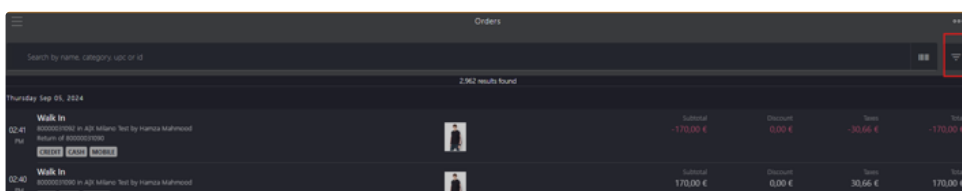


i. Enter the following keywords:

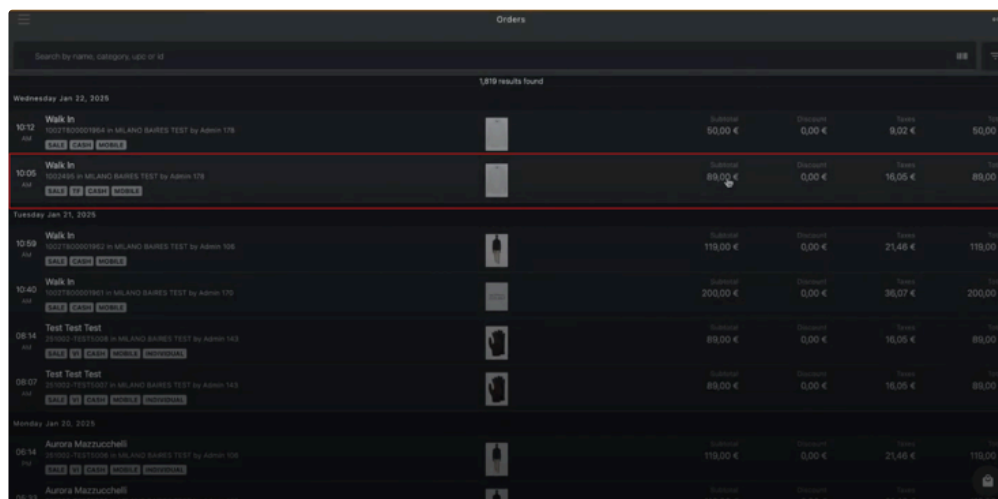
- name
- category
- upc
- id

ii. Scan the order barcode

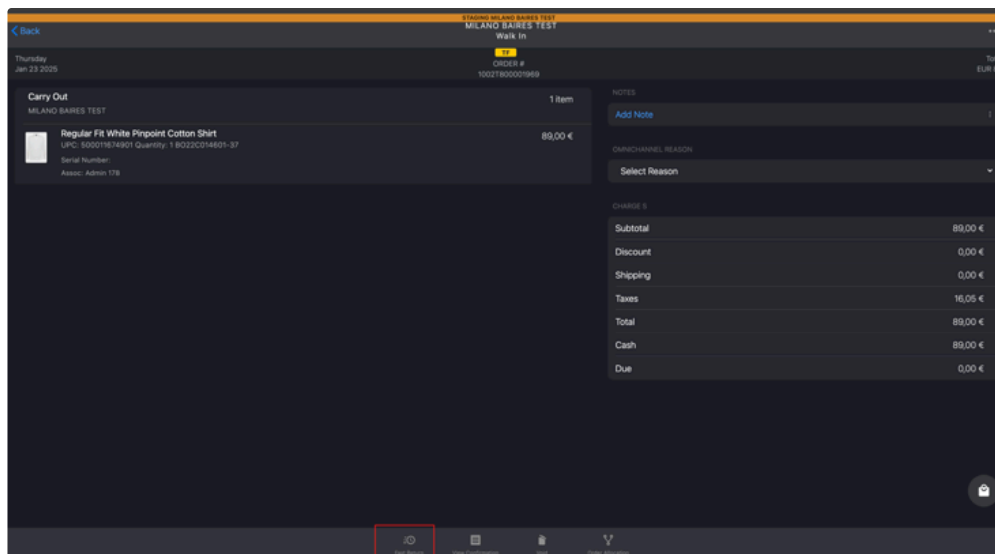
b. For an order without reference, use the integrated filters at the upper right corner.



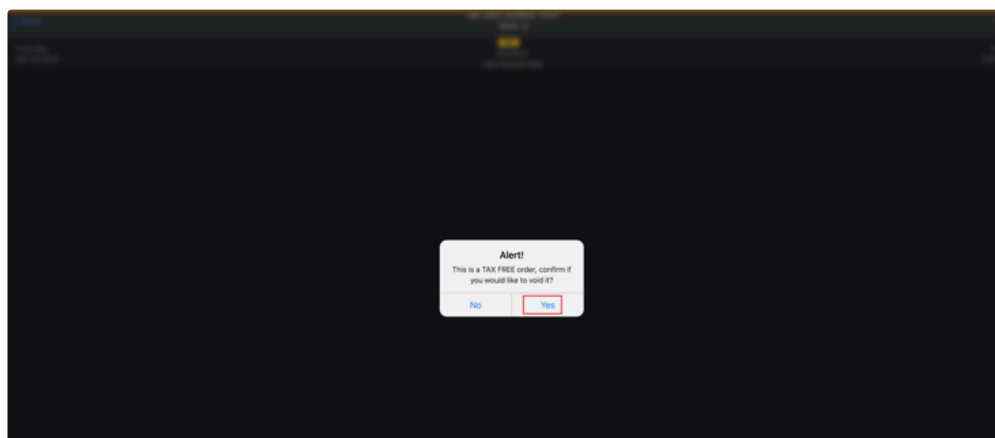
4. Click the order that customer wish to return.



5. Click **Fast Return** in the bottom bar.

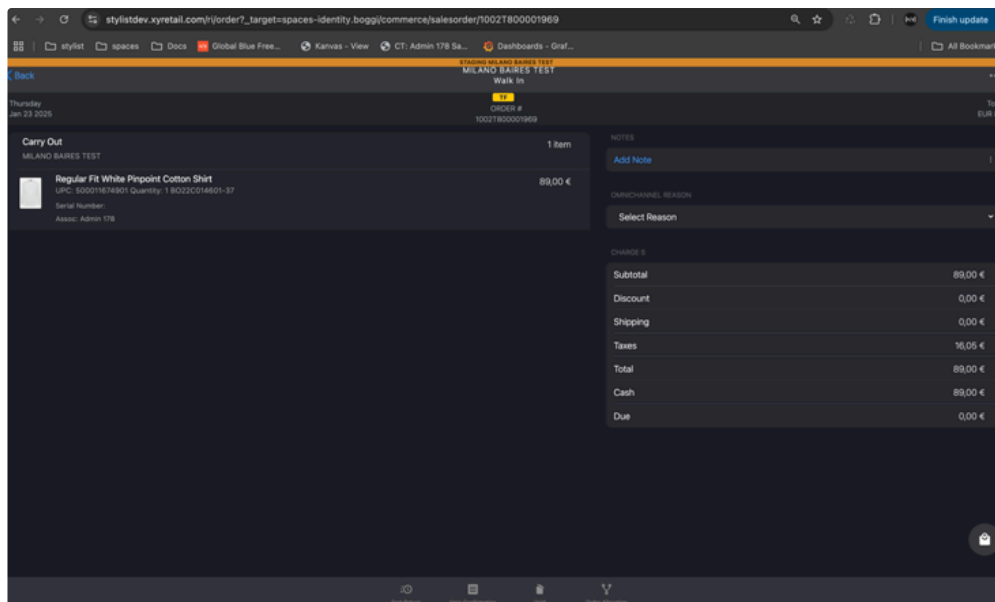


6. Click **Yes** in the **Alert!** dialog box to void tax-free the order.

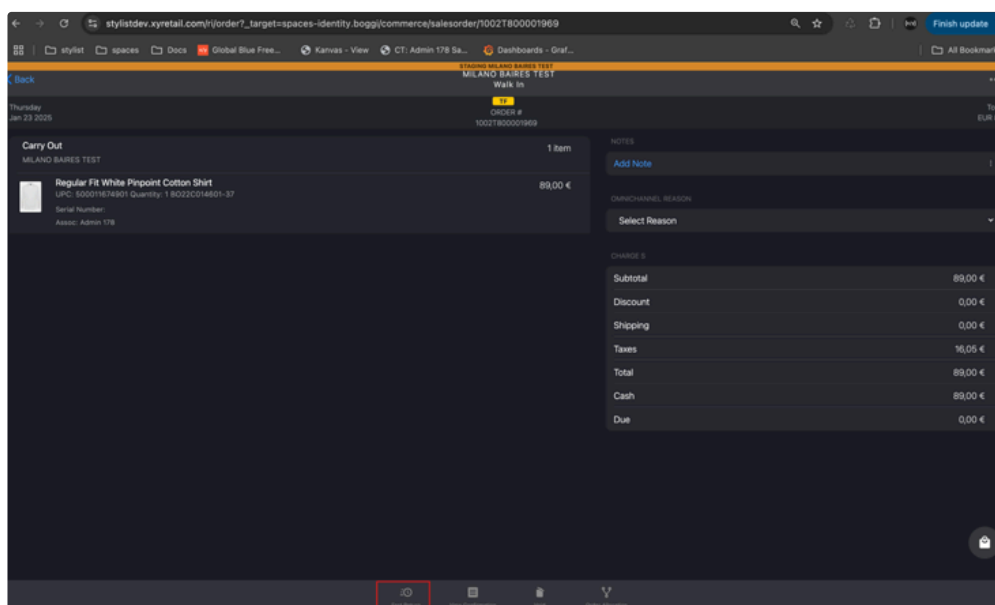


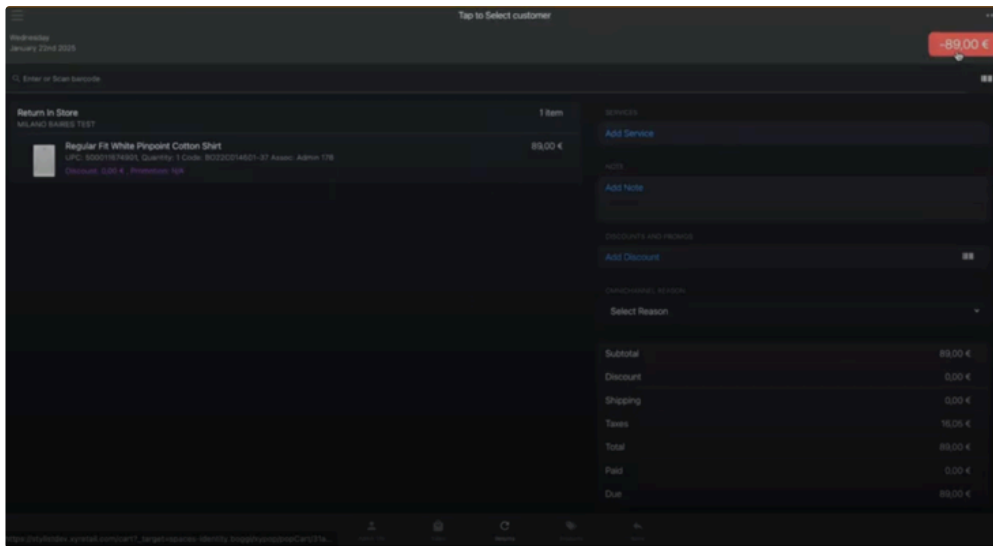
Note: If the tax-free refund has already been processed, the system will not proceed to the return cart.

7. If the void is successful, the system will navigate you to orders page.

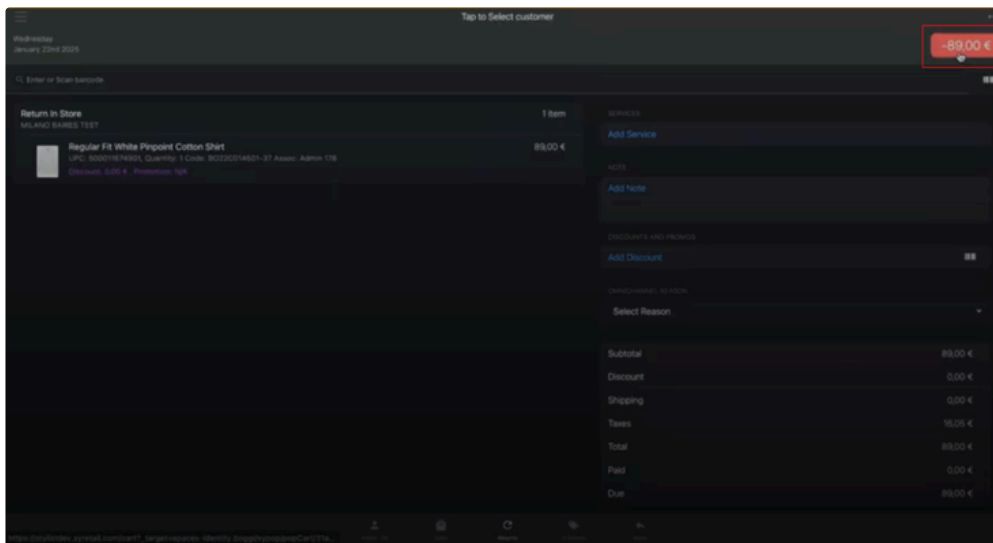


8. Click **Fast Return** again to navigate to return order cart.



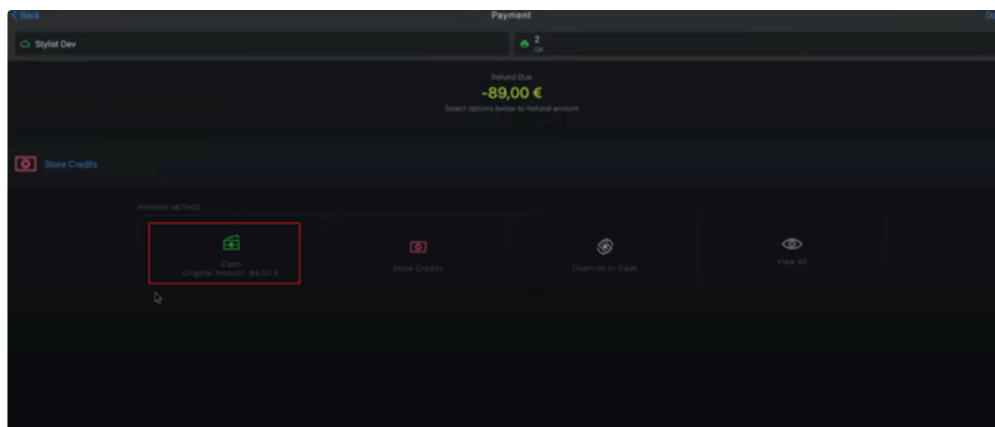


9. Click the red button located in the upper right corner.

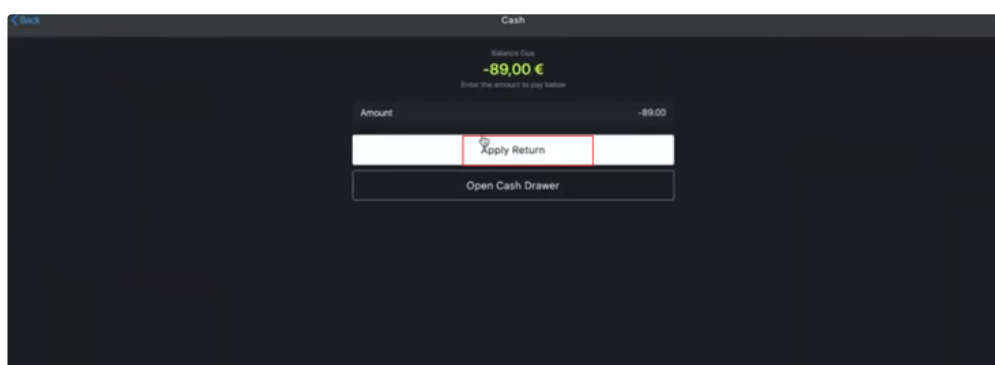


10. Select the preferred payment options.

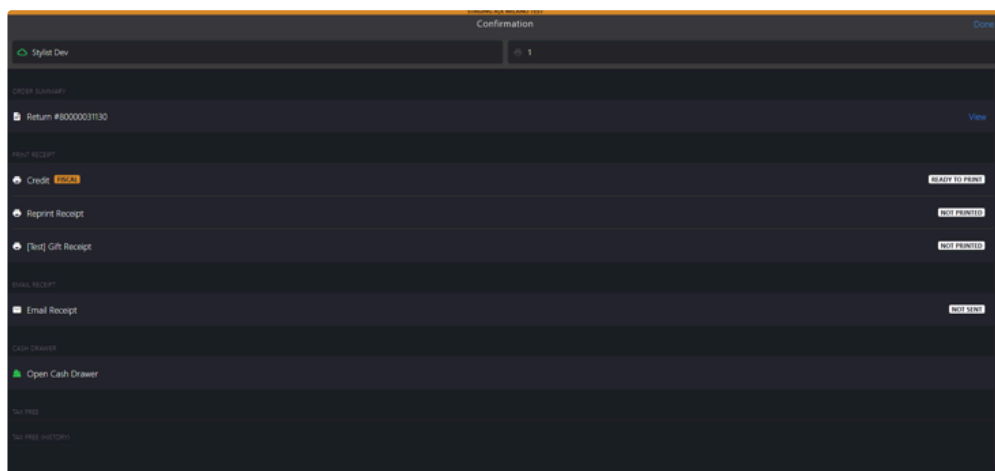
Note: CASH option has been selected in this scenario.



11. Click **Apply Return**.



12. You will be directed to the **Confirmation** page where you can print the receipts.



13. Click **Done** to complete the return transaction.



14. Verify the generated VOID number.

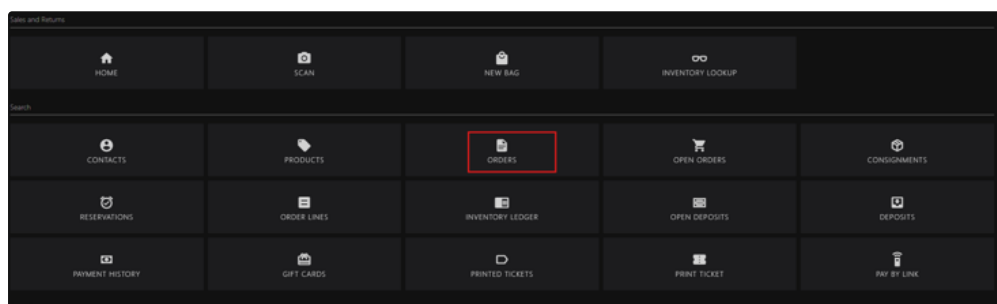
Verifying the VOID number for a Return Order

Introduction

This topic explains how to verify and confirm that the void has been successfully applied to the tax-free status when processing a return order.

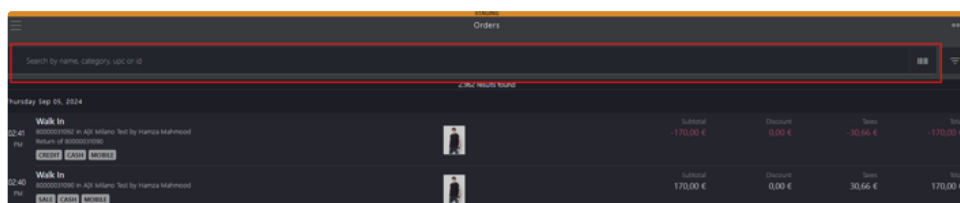
Steps to Verify the Void Number for a Return Order

1. Click the **Orders**.



2. You can search the order id using following options:

a. For an order with reference, initiate new search in the search box:



i. Enter the following keywords:

- **name**
- **category**
- **upc**
- **id**

ii. Scan the order barcode

b. For an order without reference, use the integrated filters at the upper right corner.

Orders

Search by name, category, upc or id

2,962 results found

Thursday Sep 05, 2024

Time	Order Type	Customer	Subtotal	Discount	Taxes	Total
02:41	Walk in	800000000 in App Milano Test by Franca Malinoni	-170,00 €	0,00 €	-30,66 €	-170,00 €
02:40	Walk in	800000000 in App Milano Test by Franca Malinoni	170,00 €	0,00 €	30,66 €	170,00 €

3. Click the original order.

Orders

Search by name, category, upc or id

1,820 results found

Wednesday Jan 22, 2025

Time	Order Type	Customer	Subtotal	Discount	Taxes	Total
10:16	Walk in	1000780000000 in MILANO BARETS TEST by Admin 178	-99,00 €	0,00 €	-16,05 €	-99,00 €
10:12	Walk in	1000780000000 in MILANO BARETS TEST by Admin 178	50,00 €	0,00 €	9,02 €	60,00 €
10:05	Walk in	10000000000 in MILANO BARETS TEST by Admin 178	89,00 €	0,00 €	16,05 €	89,00 €

Thursday Jan 23, 2025

Time	Order Type	Customer	Subtotal	Discount	Taxes	Total
10:58	Walk in	1000780000000 in MILANO BARETS TEST by Admin 178	178,00 €	0,00 €	21,45 €	178,00 €
10:40	Walk in	1000780000000 in MILANO BARETS TEST by Admin 178	200,00 €	0,00 €	36,07 €	200,00 €
08:14	Test Test Test	1000000000000 in MILANO BARETS TEST by Admin 178	89,00 €	0,00 €	16,05 €	89,00 €
08:07	Test Test Test	1000000000000 in MILANO BARETS TEST by Admin 178	89,00 €	0,00 €	16,05 €	89,00 €

Monday Jan 20, 2025

Time	Order Type	Customer	Subtotal	Discount	Taxes	Total
08:14	Aurora Mazzuchelli	1000000000000 in MILANO BARETS TEST by Admin 178	178,00 €	0,00 €	21,45 €	178,00 €

4. Click **View Confirmation** in the bottom bar.

xyretail.com/order?_target=spaces-identity.boggi/commerce/salesorder/10027800001969

Back

Thursday Jan 23 2025

Carry Out

MILANO BARETS TEST

1 item

Regular Fit White Pippoint Cotton Shirt
UPC: 60001674901 Quantity: 1 80220014801-37
Serial Number:
Assoc: Admin 178

89,00 €

NOTES

Add Note

ORDER CHANNEL REASON

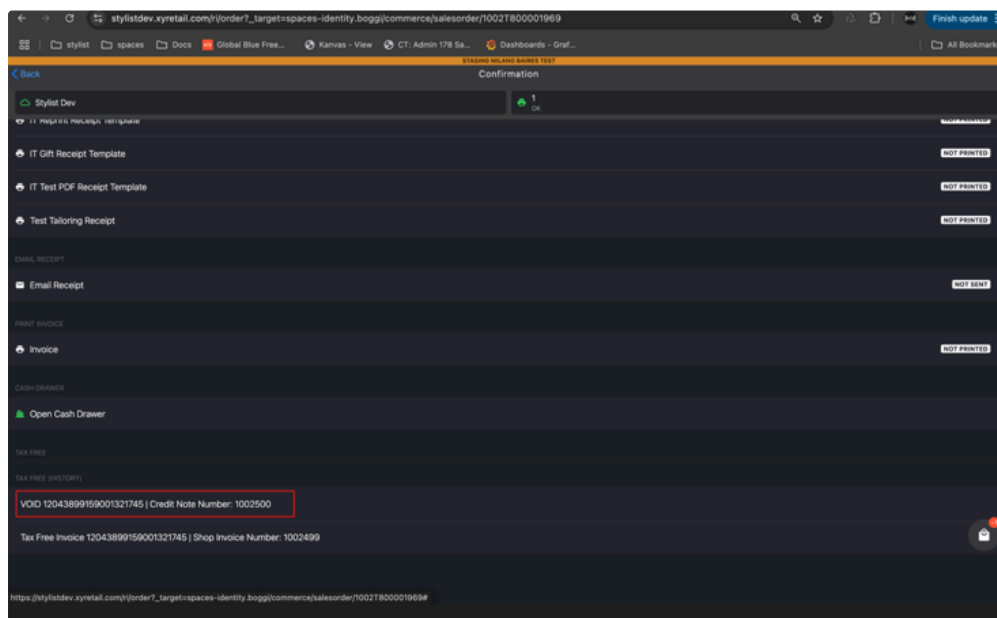
Select Reason

CHARGE S

Item	Amount
Subtotal	89,00 €
Discount	0,00 €
Shipping	0,00 €
Taxes	16,05 €
Total	89,00 €
Cash	89,00 €
Due	0,00 €

View Confirmation

5. Go to **TAX FREE (HISTORY)** to verify the **VOID** number and **Credit Note** number.



Credit Note: A financial document with a unique identifying number used to acknowledge a tax-free refund. The identifier is referred to as the Credit Note Number.

Planet Tax-Free

Overview

Tax Free shopping allows international tourists to purchase goods in the destination country without paying the Value Added Tax (VAT) that applies to local residents. Depending on the country and retailer configuration, refund forms may be issued automatically at the point of sale, or customers may be required to retain receipts and request refunds through VAT refund desks, self-service kiosks, or online platforms.

Planet tax-free enables eligible international customers to claim a refund on VAT paid for in-store purchases. The Planet integration connects seamlessly with the XY retail's Point-of-Sale (POS) system and supports the complete tax-free transaction lifecycle, including issuance, cancellation (voiding), and credit note generation.

The VAT refund process is streamlined and digitized directly at checkout using integrated tax-free shopping software from Planet. The system automatically verifies the source of the customer's credit card and generates a tax-free form during the transaction.

As a result, customers can easily validate the tax-free form at the airport and submit it to the service provider for refund processing, ensuring a smooth and compliant tax refund experience.

Eligibility Criteria

Tax-free eligibility is determined solely by the purchase amount, which must meet a defined minimum threshold. This threshold varies based on the country of purchase and the applicable local tax regulations. The system automatically verifies whether the transaction total meets the required threshold before enabling the tax-free option.

-
- [Applying Tax-Free to Sales Order with Planet](#)
 - [Reprinting the Planet Tax Free Invoice](#)
 - [Voiding Planet Tax-Free Applied to a Sales Order](#)
 - [Voiding Planet Tax-Free Status on Return Order](#)
 - [Reprinting the Planet Tax Free Credit Note](#)

Applying Tax-Free to Sales Order with Planet

Introduction

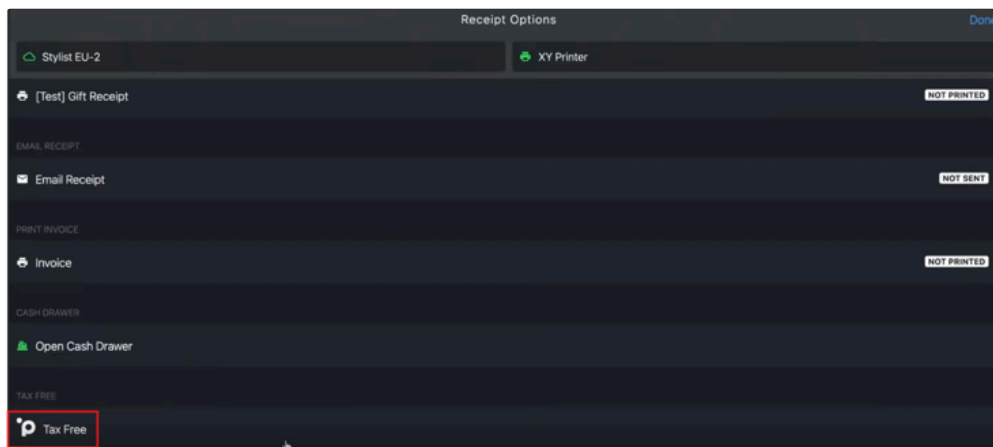
This topic explains how to apply tax-free after the payment has been processed successfully, and a receipt has been generated, provided the purchase meets the eligibility criteria.

Planet

Planet allows store staff to generate a tax-free invoice for customers directly from the XY POS system plugin through the Planet interface. The tax-free feature is automatically enabled after the payment has been processed successfully and a receipt is generated. This feature facilitates efficient and transparent post-transaction communication, enhancing customer satisfaction.

Steps to Apply Panet Tax-Free

1. Click **Tax Free** to access the **Planet** page.



Note: The receipt must be printed before generating a tax-free invoice. The system displays an alert if this step is not completed.

2. Review the purchase details displayed on the **Purchase Info** page and click **Next Step**.

planet English MERCHANT LOGO

1 Purchase Info 2 Shopper Info 3 Refund Info 4 Summary & Signature

Purchase info

Sale no. 80000049115
Sale Date 04/02/2025

Description	Additional description	Serial No.	Category	Quantity	VAT	Amount
WOMANS SHOULDER		8003616121418	MOD	1	22.00 %	105.00 €
Sub Total						105.00 €
Sale Total						105.00 €

Cancel TaxFree Next Step Return to POS

3. Review the prefilled customer information or enter passport, personal, and contact details as required, and click **Next Step**.

planet English MERCHANT LOGO

1 Purchase Info 2 Shopper Info 3 Refund Info 4 Summary & Signature

Shopper info

Scan Travel Document

Country of Residence * SINGAPORE X ✓ Document Type * Passport ✓ Nationality * SINGAPORE X ✓ Document Number * AB12345678 ✓ Q

First Name * test ✓ Last Name * test ✓ Date of Birth * 12-08-1993 ✓

Address * Calle de Serrano ✓ City * Madrid ✓ Zip Code * 28016 ✓

Mobile No. * +39 3474018823 ✓ Email * aadasda3@gmail.com ✓

Provide Tax Free form to shopper: Printed by text message by email

Cancel TaxFree Previous Step Next Step Return to POS

4. On the **Refund Info** screen, select the preferred refund method from the dropdown, and click **Next Step**:

planet English MERCHANT LOGO

1 Purchase Info 2 Shopper Info 3 Refund Info 4 Summary & Signature

Refund info

How will the shopper be refunded?

Refund Type
Print the form and choose later

Change the refund rate ??(Optional)
Enter alternative refund code

Shopper's Default Refund

12.80 €

Sale Gross Amount 105.00 €
VAT Amount 18.93 €

Cancel TaxFree Previous Step Next Step Return to POS

- o Credit Card
- o Digital Wallet

- **Cash**
 - **Print the form and choose later**
5. Review the summary details, add the shopper and merchant signatures in the Signature section, then click **Return to POS** to issue the tax-free invoice.

Example: A sample Planet Tax Free invoice is shown below for reference.

IT

OTELLO
CRF0:

ORIGINAL / REFUND COPY Page 1/1

planet
Tax FreePlanet Payment Italy S.r.l.
P.IVA: 05450611008 - Cap. Soc.: € 600.000,00
Reg. Imp. Cod. Fisc.: 11544030155 - N° REA: 887683
Via Gregoriana, 54 00187 Roma Italy
www.planetpayment.com

238012012031420247783006

Società soggetta alla direzione e coordinamento della società Planet Payment Group Holdings Limited con sede in Tully Business Park Ballinahown Co. Galway Ireland

HEADOFFICE DETAILS	MERCHANT DETAILS
GIORGIO ARMANI RETAIL SRL Via Borgonuovo 11 20121-Milano (MI) P.I.: 05065910159 N° REA : 467376 Cap. Soc. : € 12.000.000,00 CF:/N. Reg. Imp. : RM 04860450586	Armani AX Test Test street 1 1234 Milano (Milano) Merchant no.: 203142 Invoice Date: 30/01/2026 Invoice No.: 3000927
	Ex. Art 38 quater II Comma DPR 633/72

DESCRIPTION OF GOODS							
Sale Numbers: 80000049000							
Goods Description	Serial no.	Qty	VAT%	Net Amt €	VAT Amt €	Unit Gross €	Gross Amt €
ENGLISH	8057970627531	1	22,00	819,67	180,33	1000,00	1000,00
Total price incl. VAT: EUR 1000,00				Refund Amount:		EUR 120,00	
Total price excl. VAT 22%: EUR 819,67				Total VAT 22%:		EUR 180,33	

SHOPPER DETAILS / 顾客资料 / ДАННЫЕ ПОКУПАТЕЛЯ			
Name and surname / 姓名 / ФИО:	test test	Date of birth / 出生日期 / Дата рождения:	12/08/1993
Permanent address / 常住地址 / Постоянный адрес:	Calle de Serrano Madrid	Passport No / 护照号码 / Номер паспорта:	AB12345678
Country / 城市 / Страна:	SINGAPORE	Document Country of Issuing / 文件签发国家 / Страна выдачи документа:	SINGAPORE
Email:	aadasdad3@gmail.com		

REFUND OPTION / 退税方式 / Вариант возврата	
<p>For cash refund, present this form at a cash refund point (cash fee may apply). For credit card refund, write your credit card no. below. For cheque refund, write your permanent address. 现金退税，请到任何一个现金退税点出示此退税表单 (或索取退税)。信用卡退税，请在下方填写信用卡号。支票退税，请在下方填写常住地址。 退税方式选择： 请选择退税点地址。 Для получения возмещения наличными, предъявите эту форму в пункте возврата налога наличными (может взиматься сбор). Для получения возмещения на кредитную карту, напишите номер карты ниже. Для возврата средств по чеку укажите Ваш постоянный адрес.</p>	
Credit Card No. / 信用卡号 / Номер кредитной карты:	Credit Card Expiry Date / 到期日 / Дата истечения срока:
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> / <input type="text"/>
Refund on Alipay / 绑定支付宝的手机号:	Cash Refund [] I declare that I have received the amount in cash due as my refund and I agree with the airport fees/rounds applied.
	SHOPPER SIGNATURE: _____

SHOPPER DECLARATION / 顾客声明 / ЗАЯВЛЕНИЕ ПОКУПАТЕЛЯ	MANDATORY CUSTOMS EXPORT VALIDATION STAMP
<p>You understand that the credit card nominated to credit the VAT is the same card used for the payment of the goods described above. Delete if not applicable. This form and all rights deriving from it is Planet's sole property and can only be refunded by Planet or authorised partner companies. By ticking below you confirm that you would like Planet to contact you with information about goods and services which Planet feels may be of interest to you. [] You declare that you are not a resident in the EU and that you are exporting all of the goods (listed) on this form from the EU. By receiving this Tax Free form issued by Planet Payment systems you confirm that you have transferred the VAT credit, the value indicated as "VAT" in this form, to Planet Payment Italy S.r.l. You will receive the payment of the amount shown as "Refund" on this form only from Planet Payment Italy S.r.l. and from authorized partners if terms and conditions of VAT refund are respected according to the Italian law.</p> <p>How Planet uses your information Planet asks for personal information because it is necessary in order to make a tax refund. Planet may: - Share information for legal and regulatory reasons, with Planet group companies, the retailer, government departments and/or tax and customs authorities in order to make your refund. - Transfer your information outside the EEA to provide the service, such processing will be in compliance with Irish Data Protection legislation - Planet has identified Ireland as the Lead supervisory authority for all matters related to data protection.</p> <p>Your rights Your rights as an individual are fully explained on Planet's website and include your right to request a copy of information Planet holds about you and to have inaccuracies corrected. Please visit www.planetpayment.com for full terms and conditions and privacy information. By returning this form, you agree to Planet's terms and conditions.</p>	<p>The Shopper has to be non-EU resident, spends a minimum sales amount (154,99€). The Tax Free form must have the customs stamp before leaving the last country of EU. The Shopper has to leave the EU by the end of the third month after the goods were purchased or within 21 days if claiming an immediate cash refund or in-store refund.</p>
SHOPPER SIGNATURE: _____	OTELLO CRF0:

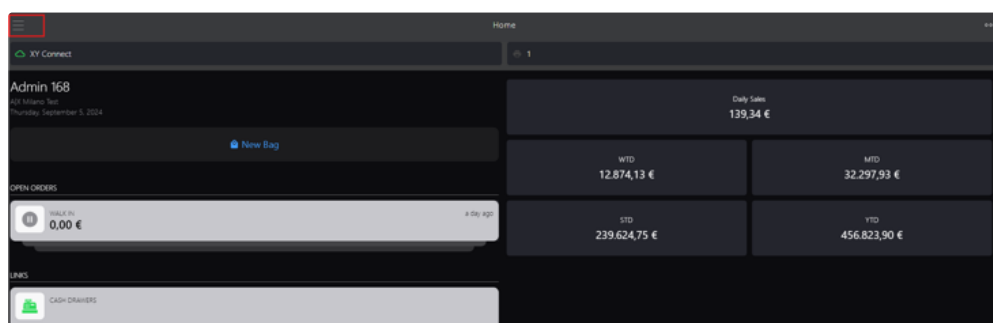
Reprinting the Planet Tax Free Invoice

Introduction

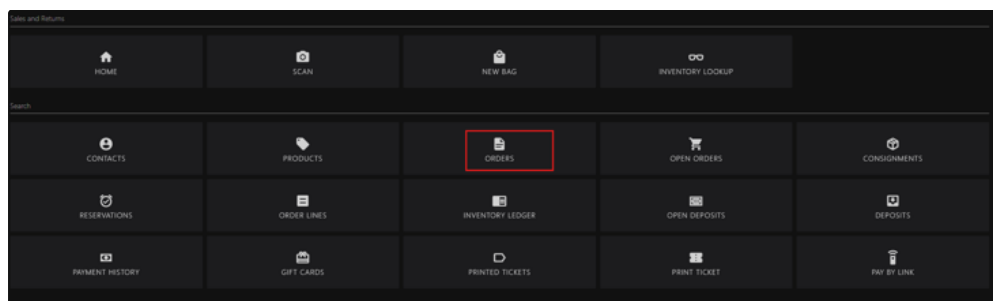
This topic explains how to reprint an already generated Planet tax free invoice document.

Steps to Apply Panet Tax-Free

1. Click the burger menu.

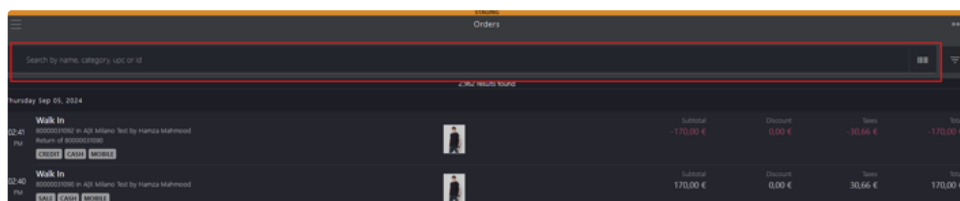


2. Click **ORDERS**.



3. Locate the order id using following options:

- a. For an order with reference, initiate new search in the search box:

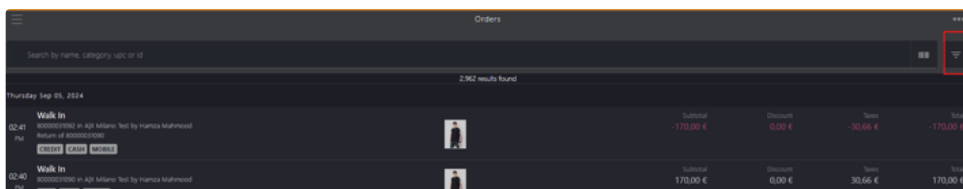


- i. Enter the following keywords:

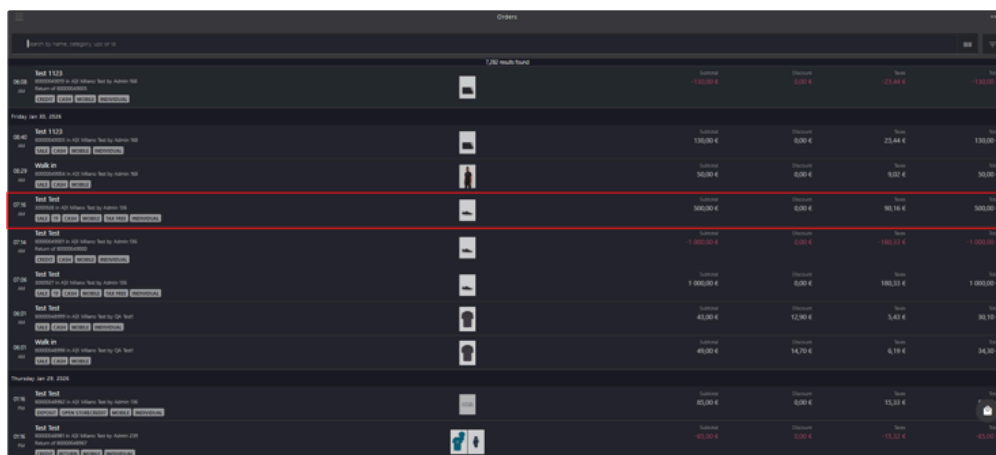
- name
- category
- upc
- id

ii. Scan the order barcode

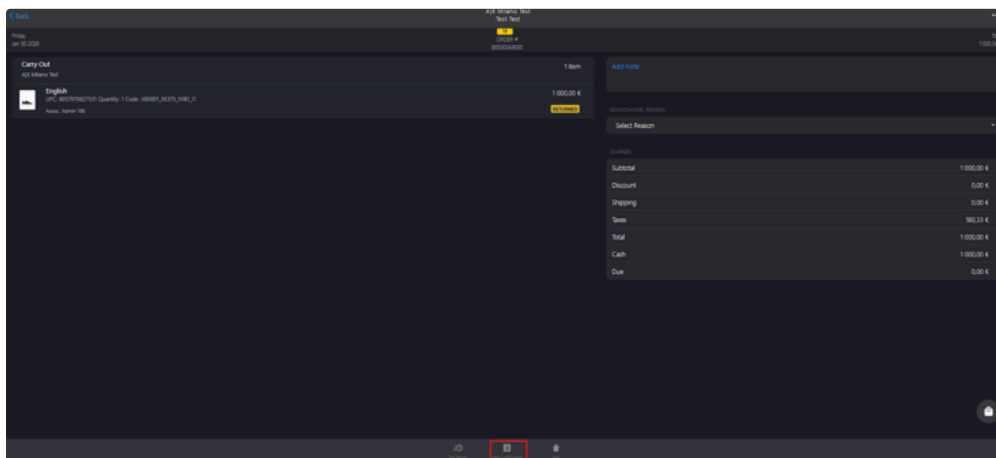
b. For an order without reference, use the integrated filters at the upper right corner.



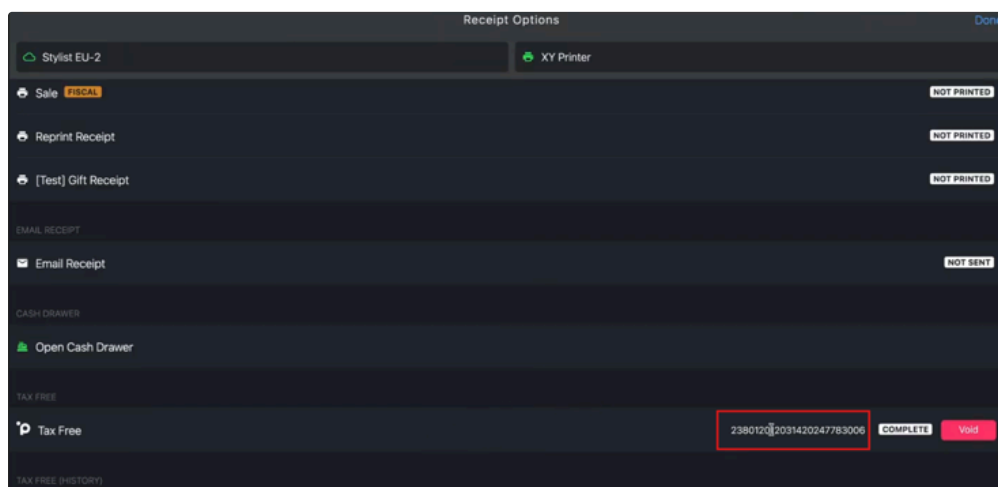
4. Click the requested order id.



5. Click **View Confirmation** in the bottom bar.



6. Click **Tax Free** again to reprint the Planet tax free invoice.



Example: A sample Planet Tax Free invoice is shown below for reference.

IT

OTELLO
CRF0:

ORIGINAL / REFUND COPY Page 1/1

planet
Tax FreePlanet Payment Italy S.r.l.
P.IVA: 05450611008 - Cap. Soc.: € 600.000,00
Reg. Imp. Cod. Fisc.: 11544030155 - N° REA: 887683
Via Gregoriana, 54 00187 Roma Italy
www.planetpayment.com

238012012031420247783006

Società soggetta alla direzione e coordinamento della società Planet Payment Group Holdings Limited con sede in Tully Business Park Ballinahown Co. Galway Ireland

HEADOFFICE DETAILS		MERCHANT DETAILS	
GIORGIO ARMANI RETAIL SRL Via Borgonuovo 11 20121-Milano (MI) P.I.: 05065910159 N° REA : 467376 Cap. Soc. : € 12.000.000,00 CF:N. Reg. Imp. : RM 04860450586	Armani AX Test Test street 1 1234 Milano (Milano) Merchant no.: 203142 Invoice Date: 30/01/2026 Invoice No.: 3000927		Ex. Art 38 quater II Comma DPR 633/72

DESCRIPTION OF GOODS							
Sale Numbers: 80000049000							
Goods Description	Serial no.	Qty	VAT%	Net Amt €	VAT Amt €	Unit Gross €	Gross Amt €
ENGLISH	8057970627531	1	22,00	819,67	180,33	1000,00	1000,00
Total price incl. VAT: EUR 1000,00				Refund Amount:		EUR 120,00	
Total price excl. VAT 22%: EUR 819,67				Total VAT 22%:		EUR 180,33	

SHOPPER DETAILS / 顾客资料 / ДАННЫЕ ПОКУПАТЕЛЯ			
Name and surname / 姓名 / ФИО:	test test	Date of birth / 出生日期 / Дата рождения:	12/08/1993
Permanent address / 常住地址 / Постоянный адрес:	Calle de Serrano Madrid	Passport No / 护照号码 / Номер паспорта:	AB12345678
Country / 城市 / Страна:	SINGAPORE	Document Country of Issuing / 文件签发国家 / Страна выдачи документа:	SINGAPORE
Email:	aadasdad3@gmail.com		

REFUND OPTION / 退税方式 / Вариант возврата	
<p>For cash refund, present this form at a cash refund point (cash fee may apply). For credit card refund, write your credit card no. below. For cheque refund, write your permanent address. 现金退税，请到任何一个现金退税点出示此退税表单 (或现金退款)。信用卡退税，请在下方填写信用卡号。支票退税，请在下方填写支付宝的手机号。如需支票退款，请填写您的永久地址。 Для получения возмещения наличными, предъявите эту форму в пункте возврата налога наличными. Для получения возмещения на кредитную карту, напишите номер карты ниже. Для возврата средств по чеку укажите Ваш постоянный адрес.</p>	
Credit Card No. / 信用卡号 / Номер кредитной карты:	Credit Card Expiry Date / 到期日 / Дата истечения срока:
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> / <input type="text"/>
Refund on Alipay / 绑定支付宝的手机号:	Cash Refund [] I declare that I have received the amount in cash due as my refund and I agree with the airport fees/rounds applied.
	SHOPPER SIGNATURE: _____

SHOPPER DECLARATION / 顾客声明 / ЗАЯВЛЕНИЕ ПОКУПАТЕЛЯ	MANDATORY CUSTOMS EXPORT VALIDATION STAMP
<p>You understand that the credit card nominated to credit the VAT is the same card used for the payment of the goods described above. Delete if not applicable. This form and all rights deriving from it is Planet's sole property and can only be refunded by Planet or authorised partner companies. By ticking below you confirm that you would like Planet to contact you with information about goods and services which Planet feels may be of interest to you. [] You declare that you are not a resident in the EU and that you are exporting all of the goods (listed) on this form from the EU. By receiving this Tax Free form issued by Planet Payment systems you confirm that you have transferred the VAT credit, the value indicated as "VAT" in this form, to Planet Payment Italy S.r.l. You will receive the payment of the amount shown as "Refund" on this form only from Planet Payment Italy S.r.l. and from authorized partners if terms and conditions of VAT refund are respected according to the Italian law.</p> <p>How Planet uses your information Planet asks for personal information because it is necessary in order to make a tax refund. Planet may: - Share information for legal and regulatory reasons, with Planet group companies, the retailer, government departments and/or tax and customs authorities in order to make your refund. - Transfer your information outside the EEA to provide the service; such processing will be in compliance with Irish Data Protection legislation - Planet has identified Ireland as the Lead supervisory authority for all matters related to data protection.</p> <p>Your rights Your rights as an individual are fully explained on Planet's website and include your right to request a copy of information Planet holds about you and to have inaccuracies corrected. Please visit www.planetpayment.com for full terms and conditions and privacy information. By returning this form, you agree to Planet's terms and conditions.</p>	<p>The Shopper has to be non-EU resident, spends a minimum sales amount (154,99€). The Tax Free form must have the customs stamp before leaving the last country of EU. The Shopper has to leave the EU by the end of the third month after the goods were purchased or within 21 days if claiming an immediate cash refund or in-store refund.</p>
SHOPPER SIGNATURE: _____	OTELLO CRF0:

Voiding Planet Tax-Free Applied to a Sales Order

Introduction

This topic explains how to void a tax-free benefit that has been applied to a sales order. The voiding process ensures compliance with tax regulations.

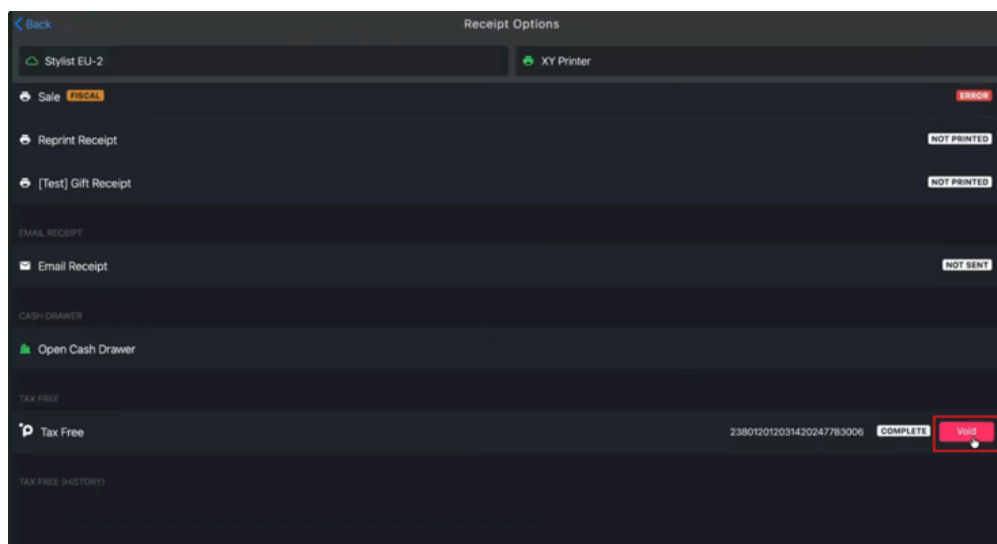
Voiding Scenarios

Voiding a tax-free sales order is necessary in the following scenarios:

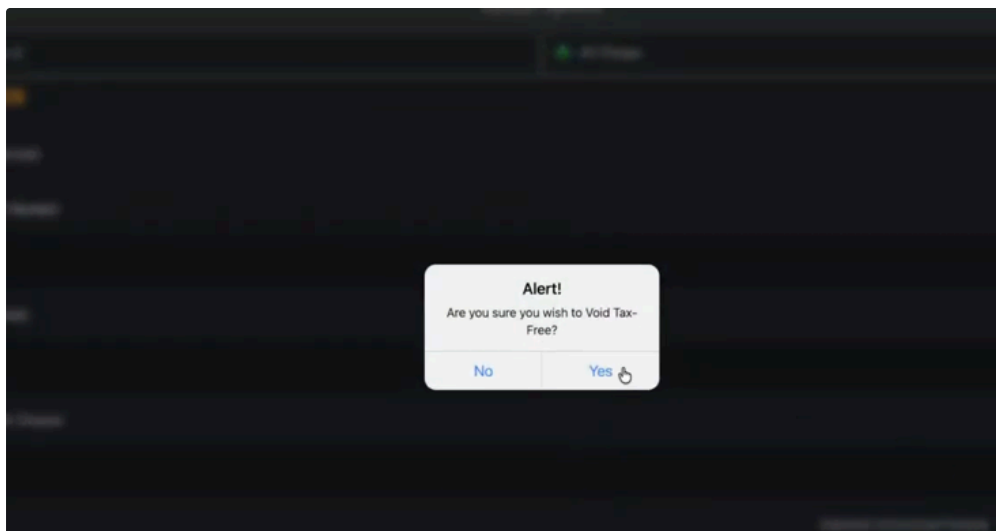
- Error in Tax-Free application, for example, incorrect customer information or incorrect eligibility criteria.
 - When there is a change in the order details that invalidates the tax-free claim.
-

Steps to Apply Void to a Tax-Free Applied Sales Order

1. Go to **TAX FREE**
2. Click **Void** to cancel the applied tax-free.



3. Click **Yes** on the **Alert** to generate the credit note.



Example: A sample Planet tax free credit note is shown below for reference.

IT OTELLO NOTA DI CREDITO Page 1/1
 planet CRF0: Test
 Tax Free [Redacted]

HEADOFFICE DETAILS		MERCHANT DETAILS	
[Redacted] RETAIL SRL		[Redacted] Test	
Via Borgonuovo 11 20121-Milano (MI) PI-05065910159-N° REA : 467376 Cap. Soc. : € 12.000.000,00 CF/N. Reg. Imp. : RM 04860450586		Test street 1 Milano Merchant no.: 203142	

DESCRIPTION OF GOODS				
Goods Description	Serial number	Quantity	VAT%	Price incl. VAT
ENGLISH	8057970627531	-1	22	EUR -1000,00

Invoice date	30/01/2026	Invoice N°	910340
Total price incl. VAT	EUR -1000,00	Refund Amount	EUR -120,00
Total price excl. VAT 22%	EUR -819,67	Total VAT 22%	EUR -180,33

SHOPPER DETAILS / 顾客资料 / ДАННЫЕ ПОКУПАТЕЛЯ	
Name and surname / 姓名 / ФИО: test test	Date of birth / 出生日期 / Дата рождения: 12/08/1993
Permanent address / 常住地址 / Calle de Serrano Madrid	Passport No / 护照号码 / Номер паспорта: AB12345678
Country / 城市 / Страна: SINGAPORE	Document Country of Issuing / 文件签发国家 / SINGAPORE
Email / 电子邮件 / Электронная почта: aadasdad3@gmail.com	

NOTA DI CREDITO - REF : INVOICE NUMBER 3000927 - DATE: 30/01/2026
 VOIDED VOUCHER: 23801201-203142-0247763006

Voiding Planet Tax-Free Status on Return Order

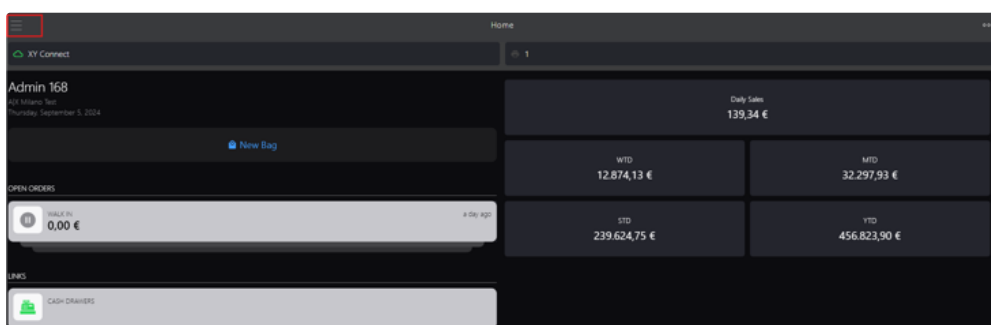
Introduction

This topic explains how to void tax-free when processing a return order.

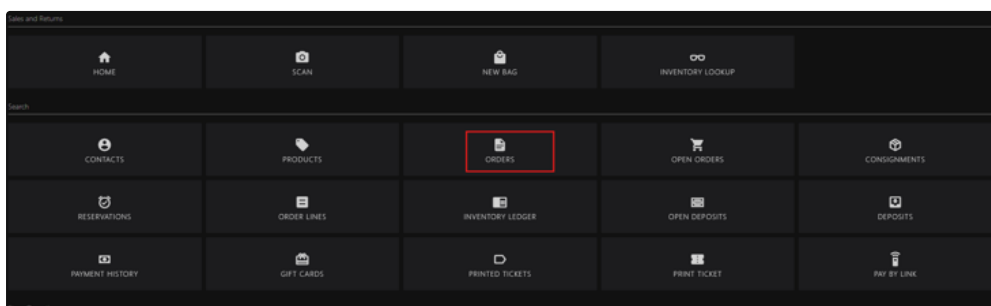
Steps to Void Tax-Free Status on Return Order

Phase I- Returning the Order

1. Click the burger menu.

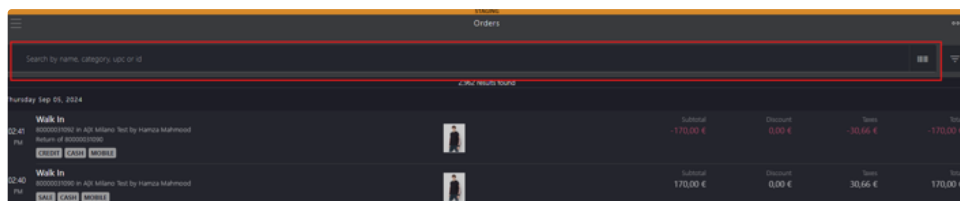


2. Click **ORDERS**.



3. Locate the order id using following options:

a. For an order with reference, initiate new search in the search box:

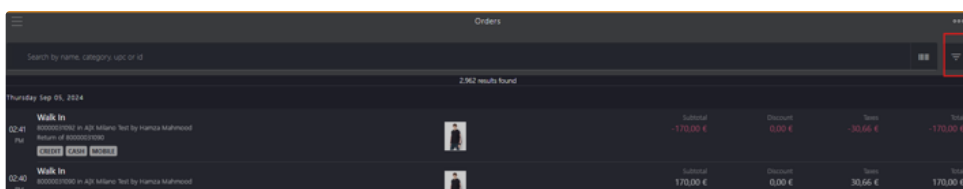


i. Enter the following keywords:

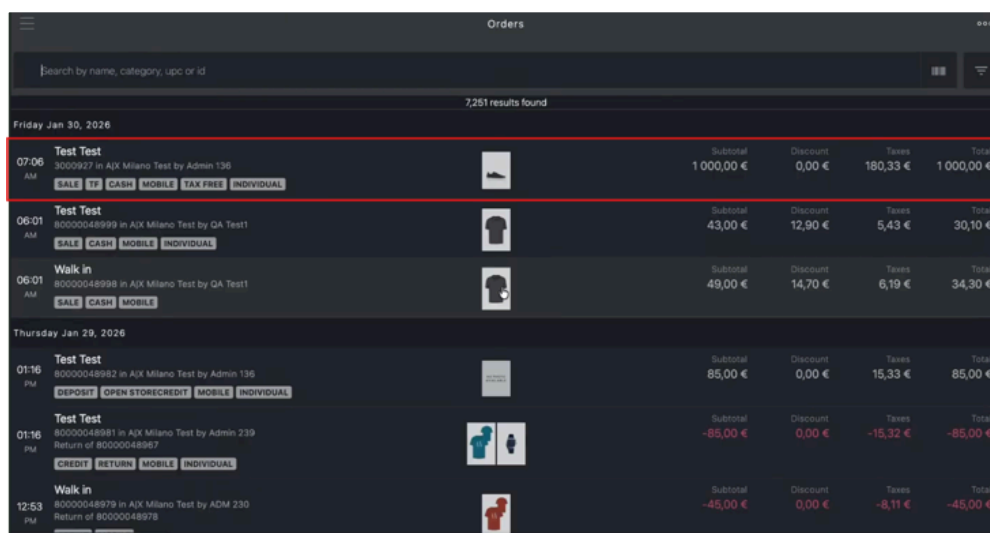
- name
- category
- upc
- id

ii. Scan the order barcode

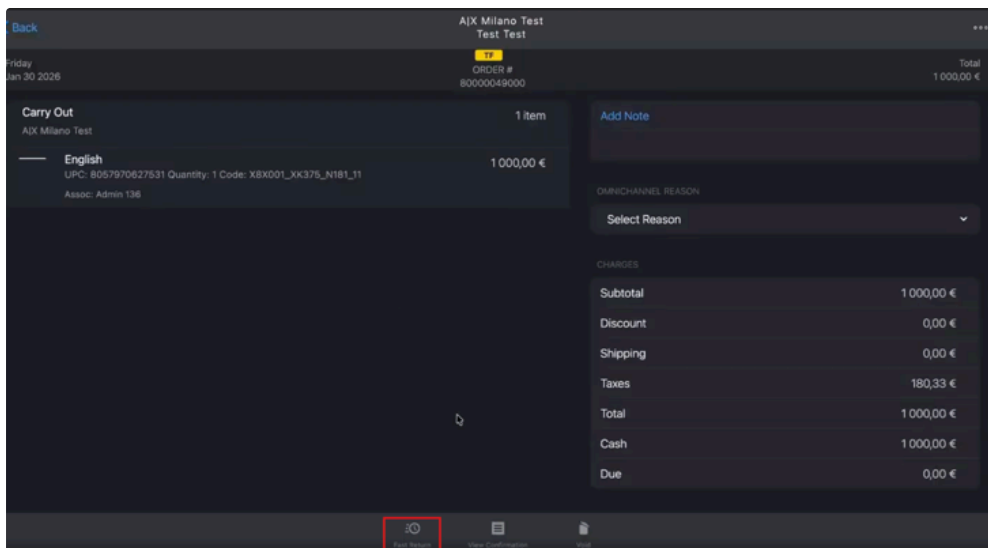
b. For an order without reference, use the integrated filters at the upper right corner.



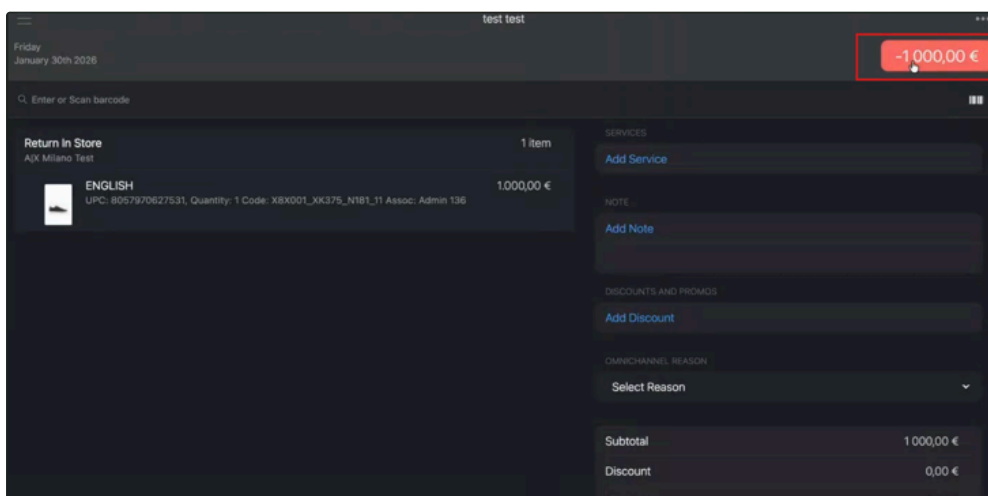
4. Click the order that customer wish to return.



5. Click **Fast Return** in the bottom bar.

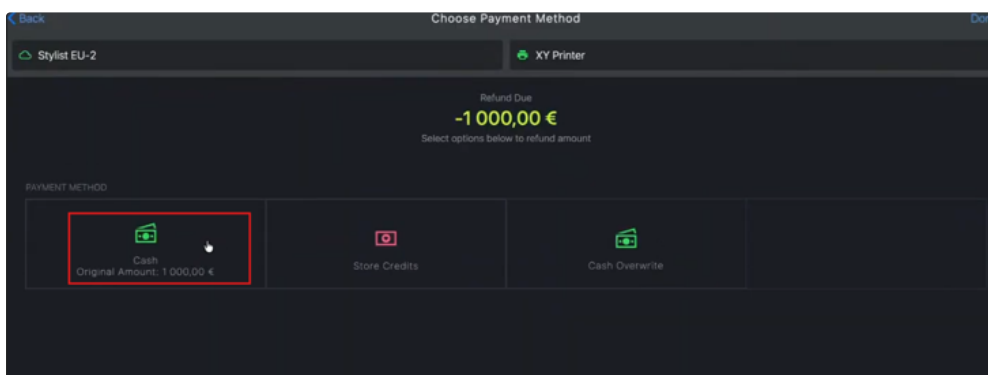


6. Click the red button located in the upper right corner.

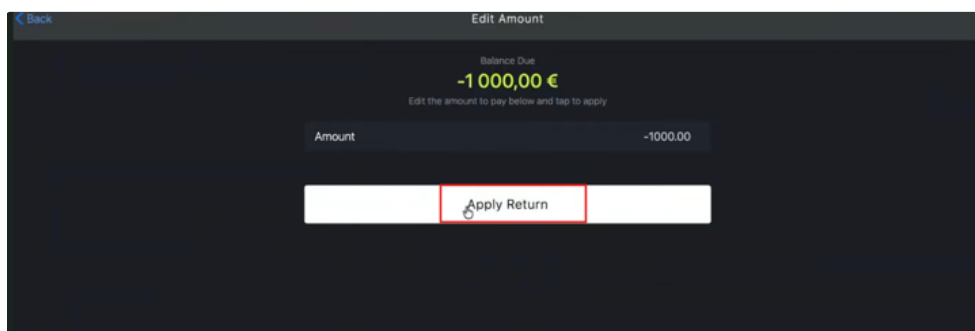


7. Select the preferred payment options.

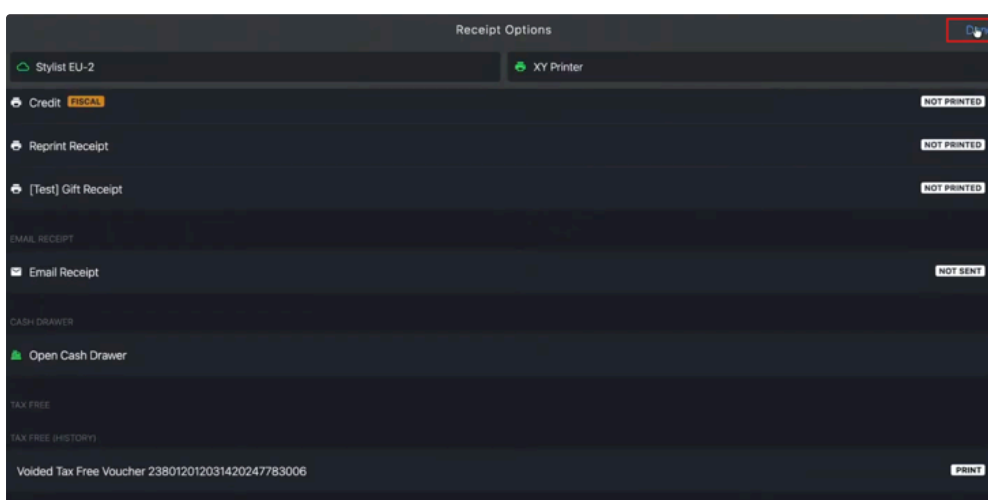
Note: CASH option has been selected in this scenario.



8. Click **Apply Return**.

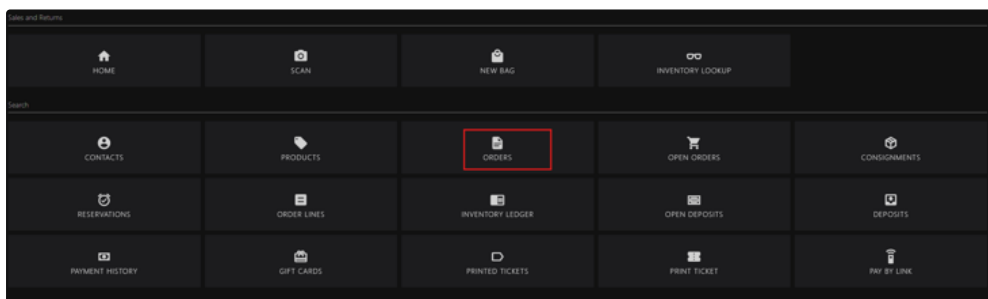


9. Click Done to complete the return transaction.



Phase II- Voiding the Tax Free

1. Click **ORDERS** again.



2. Click the sales order.

Orders

Search by name, category, upc or id

7,152 results found

Friday Jan 30, 2026

Time	Description	Subtotal	Discount	Taxes	Total
07:14 AM	Test Test 80000049001 in AXJ Milano Test by Admin 136 Return of 80000049000	-1 000,00 €	0,00 €	-180,33 €	-1 000,00 €
07:06 AM	Test Test 30000927 in AXJ Milano Test by Admin 136	1 000,00 €	0,00 €	180,33 €	1 000,00 €
06:01 AM	Test Test 80000048999 in AXJ Milano Test by QA Test1	43,00 €	12,90 €	5,43 €	30,10 €
06:01 AM	Walk in 80000048998 in AXJ Milano Test by QA Test1	49,00 €	14,70 €	6,19 €	34,30 €

Thursday Jan 29, 2026

01:16 PM	Test Test 80000048982 in AXJ Milano Test by Admin 136	85,00 €	0,00 €	15,33 €	85,00 €
01:16 PM	Test Test 80000048981 in AXJ Milano Test by Admin 239 Return of 80000048967	-85,00 €	0,00 €	-15,32 €	-85,00 €

3. Click **View Confirmation** in the bottom bar.

Back

AXJ Milano Test
Test Test

Friday Jan 30 2026

ORDER # 80000049000

Total 1 000,00 €

Carry Out 1 item

AXJ Milano Test

English 1 000,00 €
UPC: 8057970627531 Quantity: 1 Code: XBX001_KX375_N181_31
Assoc: Admin 136

RETURNED

ADD NOTE

OMNICHANNEL REASON

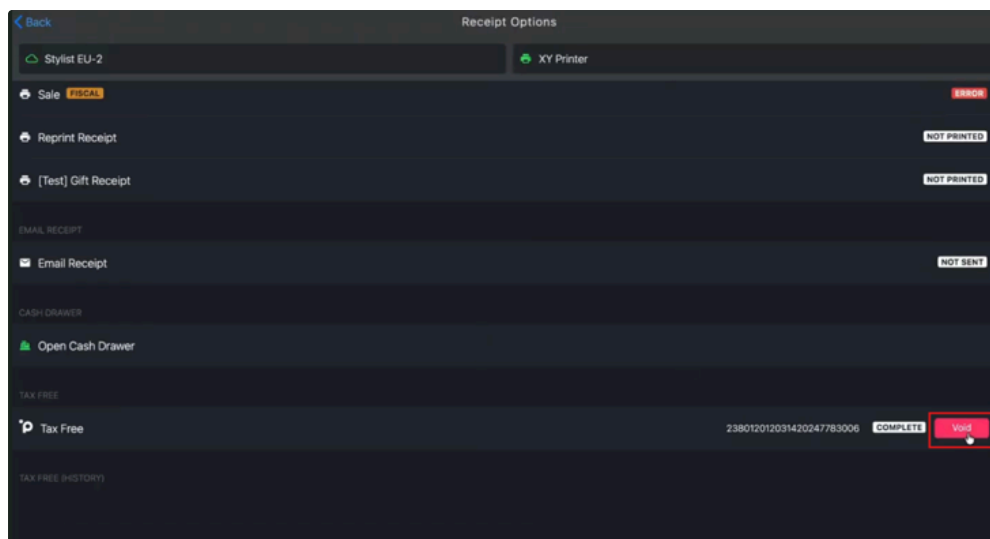
Select Reason

CHARGES

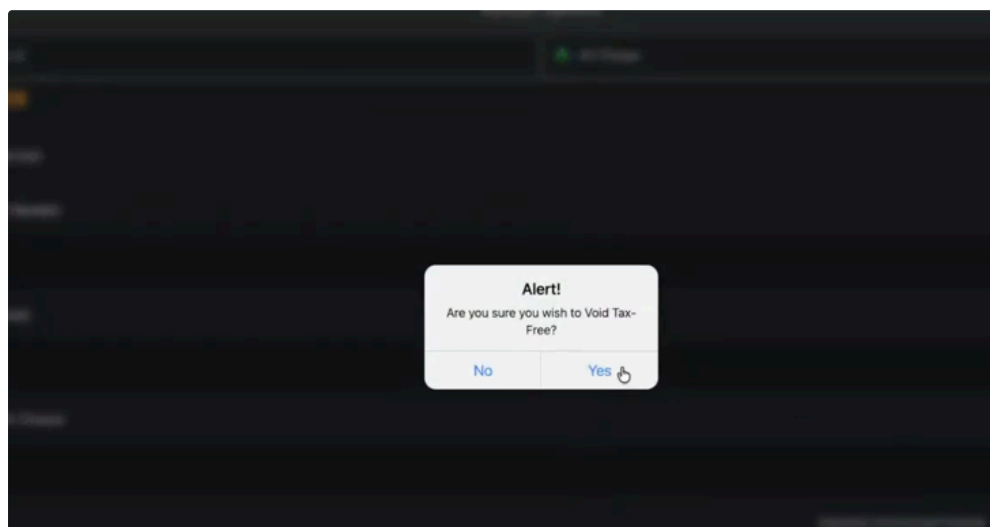
Subtotal	1 000,00 €
Discount	0,00 €
Shipping	0,00 €
Taxes	180,33 €
Total	1 000,00 €
Cash	1 000,00 €
Due	0,00 €

Fast Return View Confirmation Void

4. Click **Void** button.



5. Click **Yes** on the **Alert** to generate the credit note.



Example: A sample Planet tax free credit note is shown below for reference.

IT

OTELLO
CRF0:

NOTA DI CREDITO

Page 1/1

planet
Tax Free

Test

HEADOFFICE DETAILS		MERCHANT DETAILS		
GIORGIO ARMANI RETAIL SRL Via Borgonuovo 11 20121-Milano (MI) PI-05065910159-N° REA : 467376 Cap. Soc. : € 12.000.000,00 CF/N. Reg. Imp. : RM 04860450586		Test Test street 1 Milano Merchant no.: 203142		
DESCRIPTION OF GOODS				
Goods Description	Serial number	Quantity	VAT%	Price incl. VAT
ENGLISH	8057970627531	-1	22	EUR -1000,00
Invoice date		30/01/2026	Invoice N°	
Total price incl. VAT		EUR -1000,00	Refund Amount	
Total price excl. VAT 22%		EUR -819,67	Total VAT 22%	
			EUR -120,00	
			EUR -180,33	
SHOPPER DETAILS / 顾客资料 / ДАННЫЕ ПОКУПАТЕЛЯ				
Name and surname / 姓名 / ФИО: test test		Date of birth / 出生日期 / Дата рождения: 12/08/1993		
Permanent address / 常住地址 / Calle de Serrano Madrid		Passport No / 护照号码 / Номер паспорта: AB12345678		
Country / 城市 / Страна: SINGAPORE		Document Country of Issuing / 文件签发国家 / SINGAPORE		
Email / 电子邮件 / Электронная почта: aadasdad3@gmail.com		Страна выдачи документа:		
NOTA DI CREDITO - REF.: INVOICE NUMBER 3000927 - DATE: 30/01/2026				
VOIDED VOUCHER: 23891201-203142-0247763096				

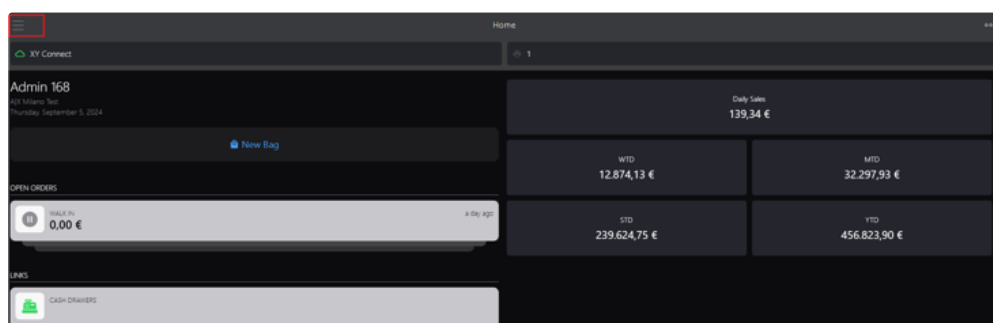
Reprinting the Planet Tax Free Credit Note

Introduction

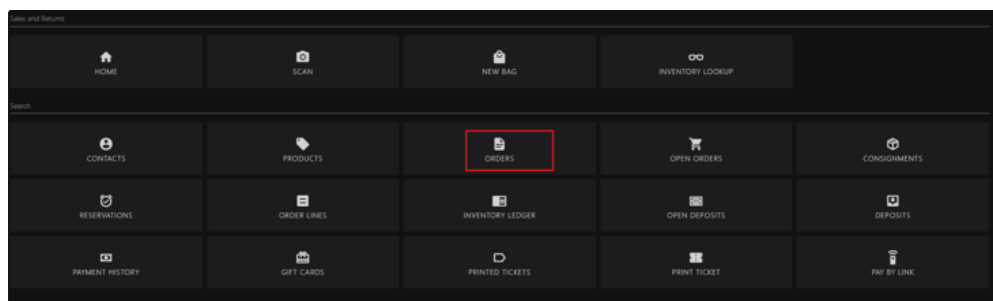
This topic explains how to reprint an already generated Planet tax free credit note.

Steps to Apply Panet Tax-Free

1. Click the burger menu.

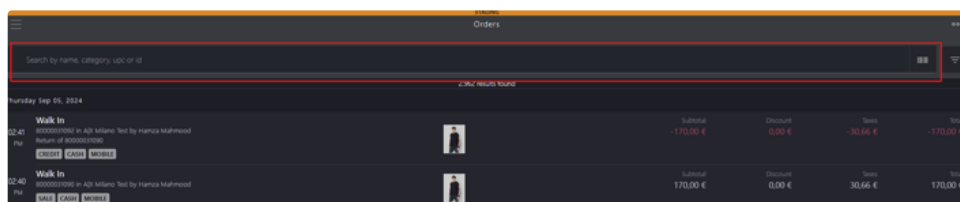


2. Click **ORDERS**.



3. Locate the order id using following options:

- a. For an order with reference, initiate new search in the search box:

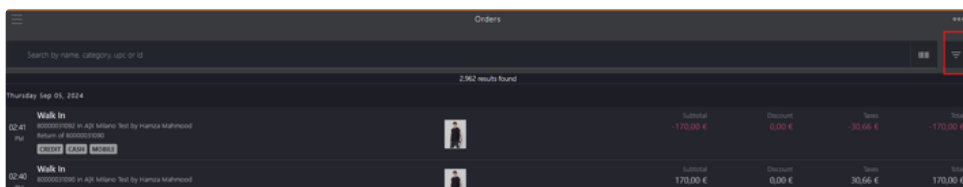


- i. Enter the following keywords:

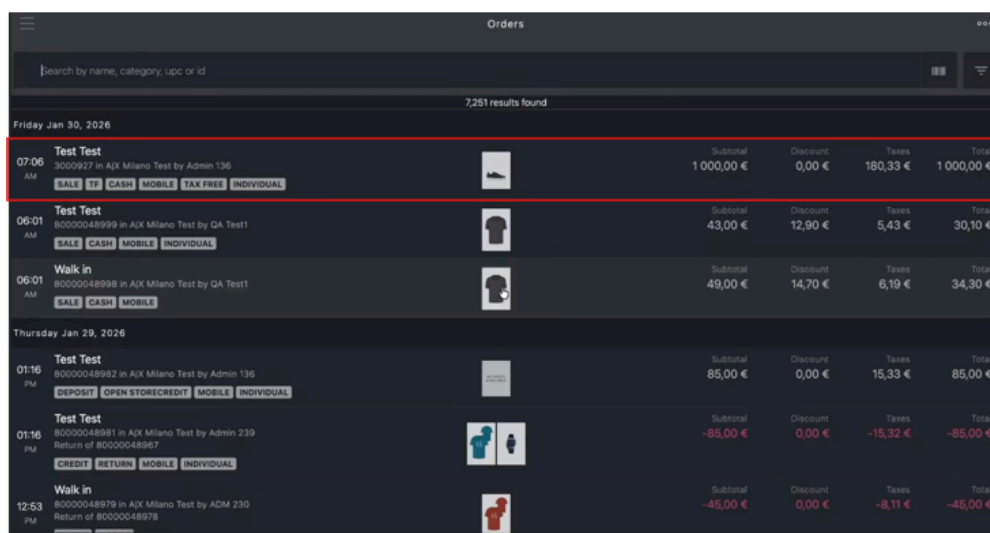
- name
- category
- upc
- id

ii. Scan the order barcode

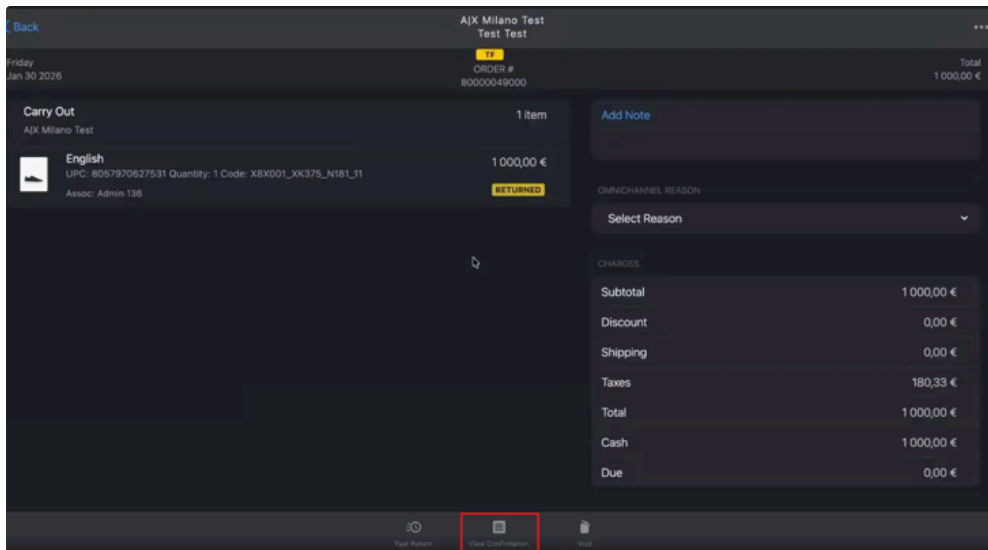
b. For an order without reference, use the integrated filters at the upper right corner.



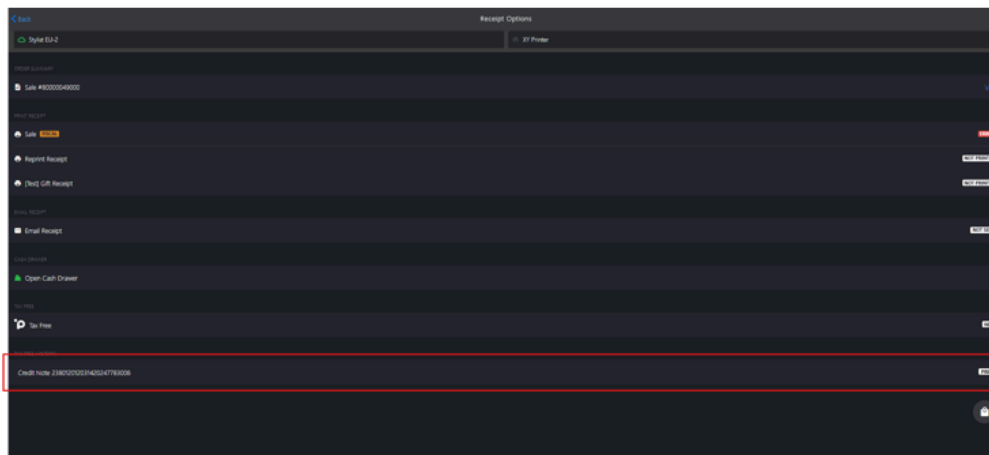
4. Click the requested order id.



5. Click **View Confirmation** in the bottom bar.



6. Go to **Tax Free (History)**, then click Credit Note with the specified 16-digit number, for example, Credit Note 238012012031420247783018 to reprint the Planet credit note.



Physical Card Registration

Introduction

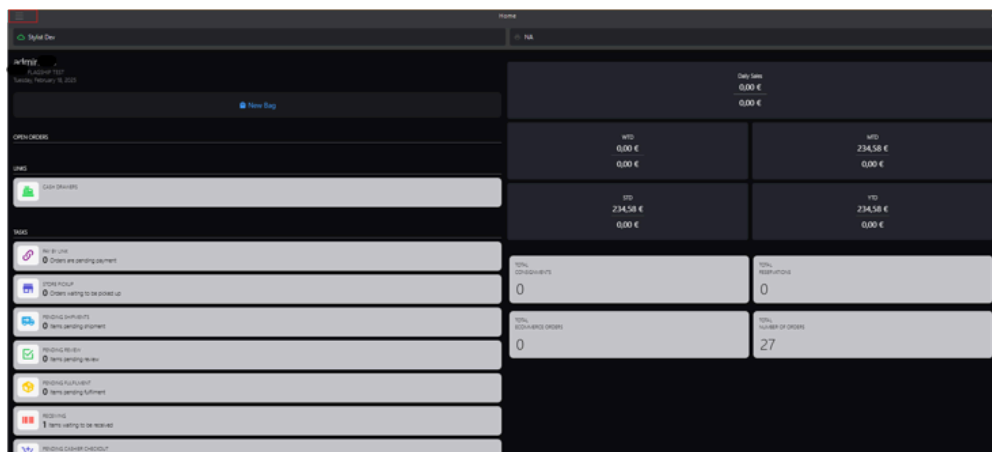
A physical card is a card issued by respective brands to identify a customer's membership or registration with that brand. This card is not associated with other features such as loyalty programs, gift cards, payment methods, purchase history, or store credits.

The Physical card includes a barcode that will be scanned via X/Y Stylist POS during customer registration. This barcode will represent the customer's brand card code that is saved into the customer's account.

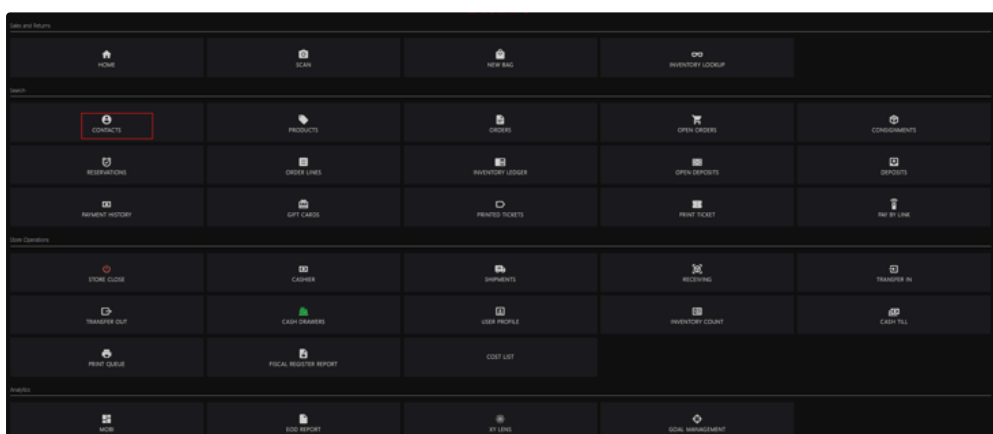
Note: The physical card is not issued for business customer registration.

Steps for Physical Card Registration

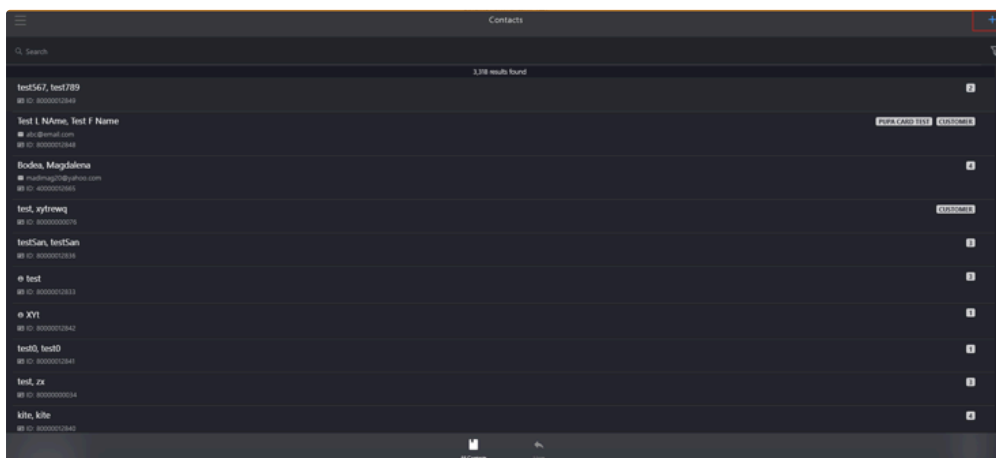
1. Click the burger menu.



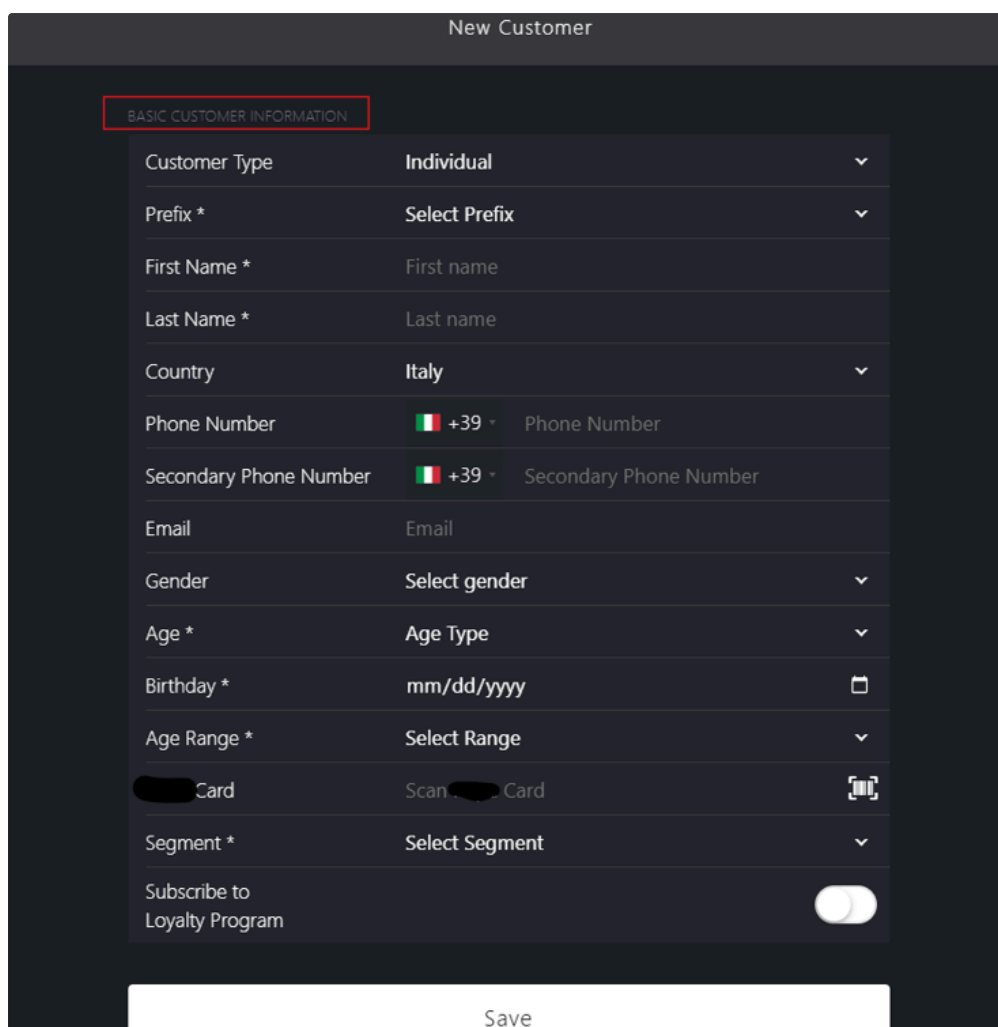
2. Click **Contacts**.



3. Click + icon in the upper-right corner.



4. Enter the [BASIC CUSTOMER INFORMATION](#) section parameters.







A screenshot of the 'New Customer' form in the XY Stylist app. The 'BASIC CUSTOMER INFORMATION' section is highlighted with a red box. The form includes the following fields:

- Customer Type: Individual
- Prefix *: Select Prefix
- First Name *: First name
- Last Name *: Last name
- Country: Italy
- Phone Number: +39 Phone Number
- Secondary Phone Number: +39 Secondary Phone Number
- Email: Email
- Gender: Select gender
- Age *: Age Type
- Birthday *: mm/dd/yyyy
- Age Range *: Select Range
- Card: Scan Card
- Segment *: Select Segment
- Subscribe to Loyalty Program: [Toggle]

A 'Save' button is located at the bottom of the form.







5. Scan the card barcode in the **Card** field.

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Select Prefix	▼
First Name *	First name	
Last Name *	Last name	
Country	Italy	▼
Phone Number	 +39 ▼ Phone Number	
Secondary Phone Number	 +39 ▼ Secondary Phone Number	
Email	Email	
Gender	Select gender	▼
Age *	Age Type	▼
Birthday *	mm/dd/yyyy	
Age Range *	Select Range	▼
 Card	Scan  Card	
Segment *	Select Segment	▼
Subscribe to Loyalty Program		<input checked="" type="checkbox"/>

6. After Scanning, the card number will be associated with the respective customer.

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Miss	▼
First Name *	raj	
Last Name *	test	
Country	Italy	▼
Phone Number	 +39	Phone Number
Secondary Phone Number	 +39	Secondary Phone Number
Email	Email	
Gender	Select gender	▼
Age *	Date Of Birth	▼
Birthday *	06/09/2000	
Age Range *	Select Range	▼
 Card	6372184792863	
Subscribe to		

- The physical card for the existing customer can be replaced by scanning the new physical card.

No Card Registration

Introduction

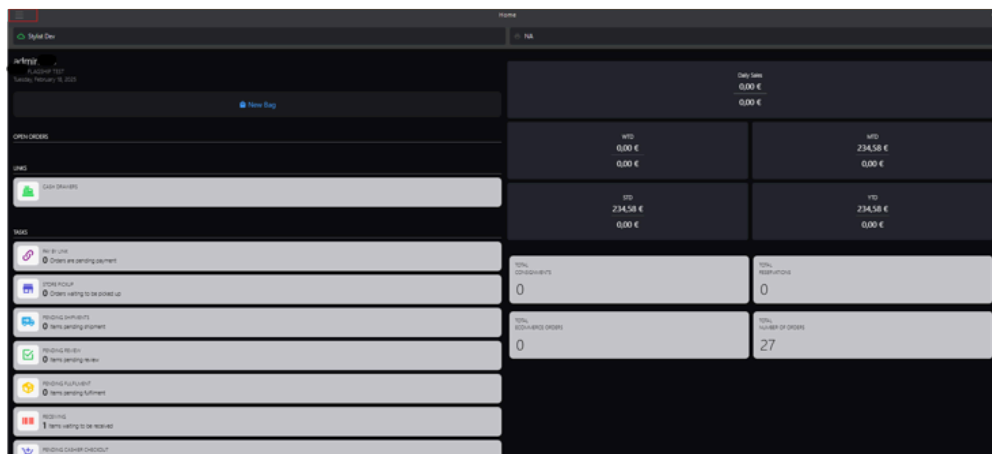
In XY POS, the customer registration process that does not involve the issuance of a physical card is referred to as no card registration. This process generates a digital card number, which is subsequently identical to the customer number.

A Digital Card is a card issued by respective brands to identify their customers' membership or registration with that brand. This card is not associated with other features such as loyalty programs, gift cards, payment methods, purchase history, or store credits.

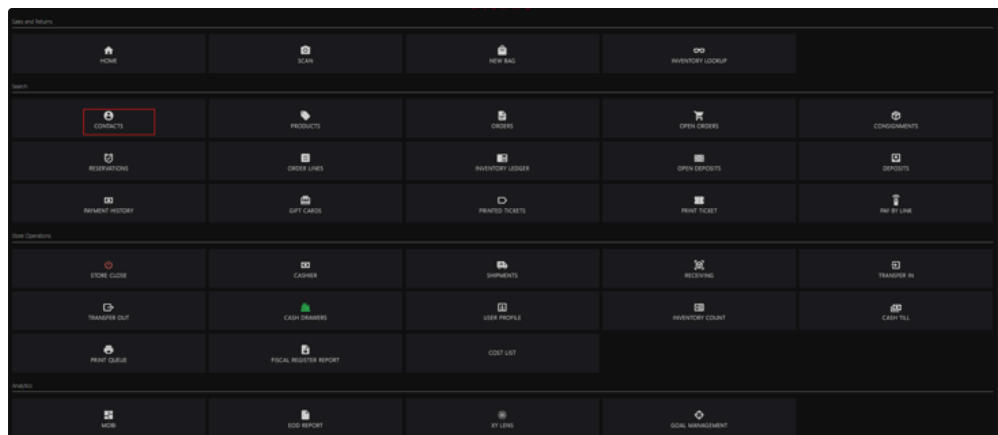
Note: The digital card is not issued for business customer registration.

Steps for Physical Card Registration

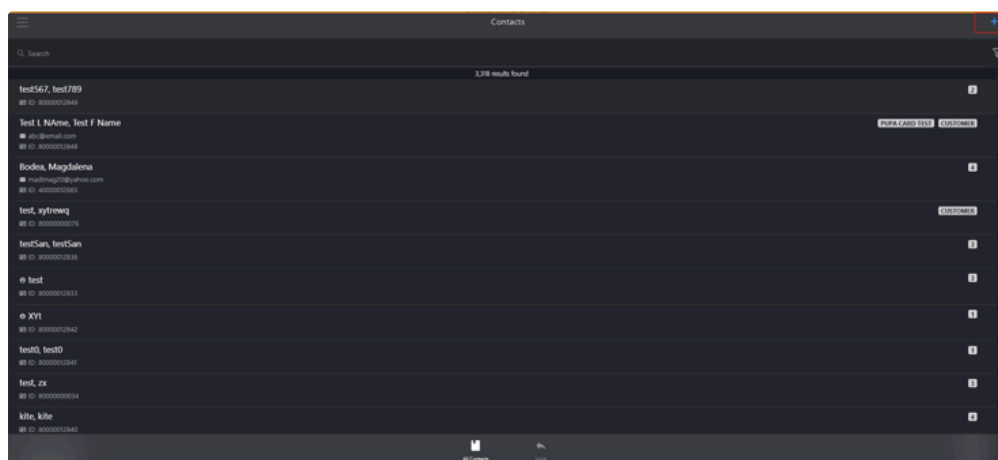
1. Click the burger menu.



2. Click **Contacts**.









3. Click + icon in the upper-right corner.



4. Enter the [BASIC CUSTOMER INFORMATION](#) section parameters.

New Customer






BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Select Prefix	▼
First Name *	First name	
Last Name *	Last name	
Country	Italy	▼
Phone Number	 +39 * Phone Number	
Secondary Phone Number	 +39 * Secondary Phone Number	
Email	Email	
Gender	Select gender	▼
Age *	Age Type	▼
Birthday *	mm/dd/yyyy	
Age Range *	Select Range	▼
 Card	Scan  Card	
Segment *	Select Segment	▼
Subscribe to Loyalty Program		<input checked="" type="checkbox"/>

Save

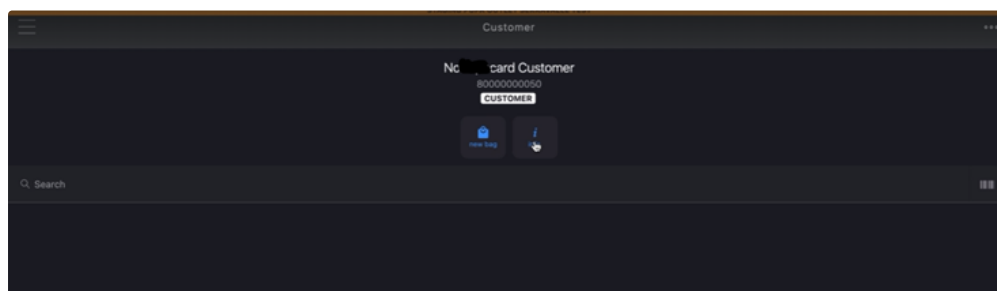
5. Don't Scan the card barcode in the **Card** field.

BASIC CUSTOMER INFORMATION

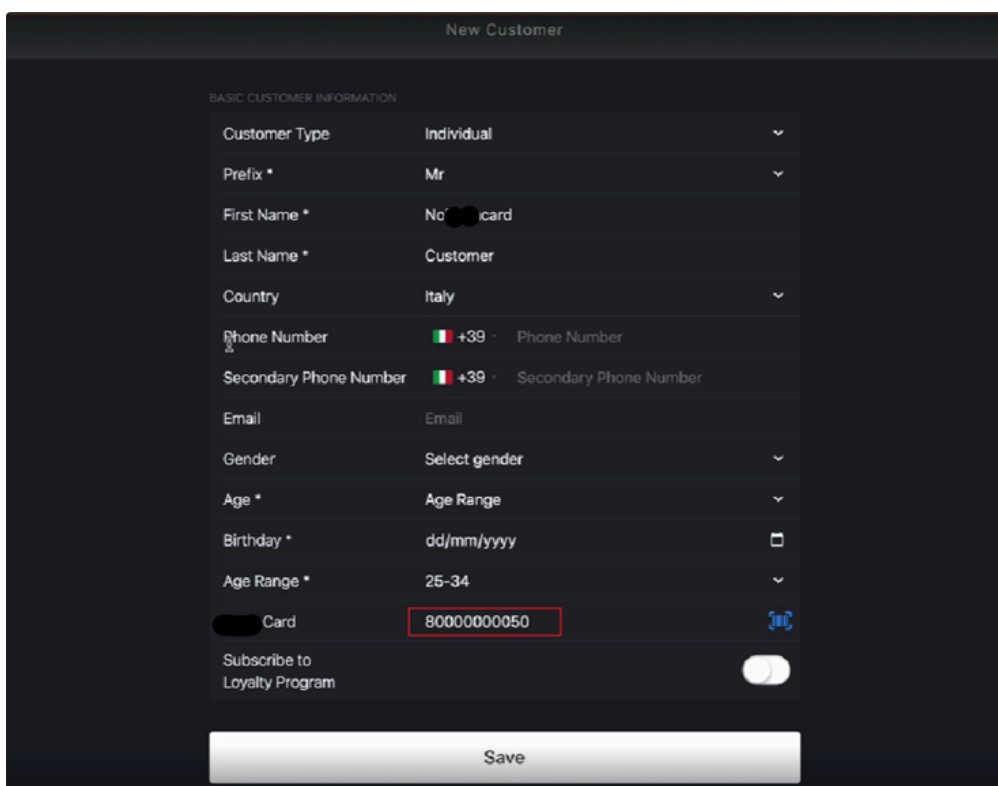
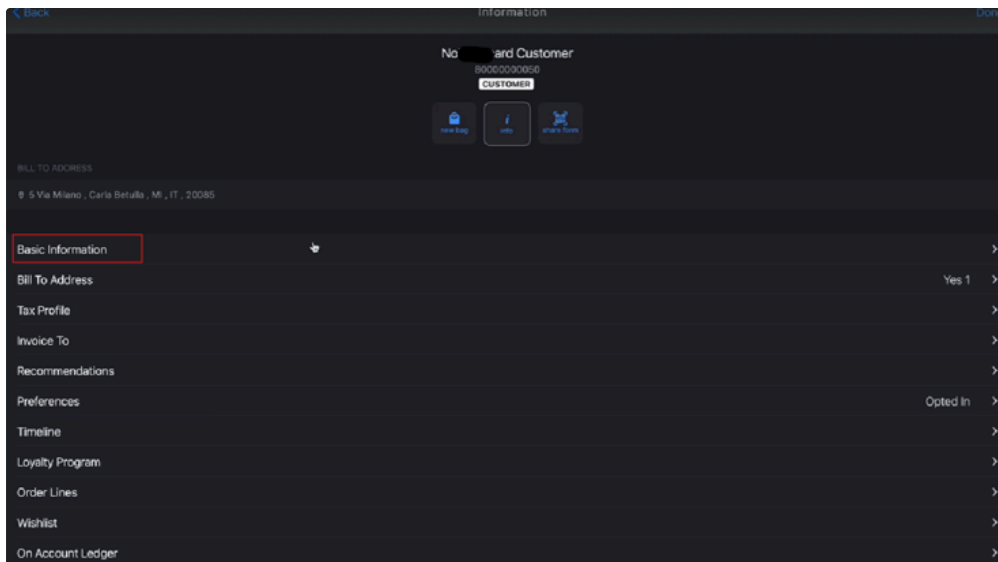
Customer Type	Individual	▼
Prefix *	Select Prefix	▼
First Name *	First name	
Last Name *	Last name	
Country	Italy	▼
Phone Number	 +39 ▾	Phone Number
Secondary Phone Number	 +39 ▾	Secondary Phone Number
Email	Email	
Gender	Select gender	▼
Age *	Age Type	▼
Birthday *	mm/dd/yyyy	📅
Age Range *	Select Range	▼
 Card	Scan  Card	
Segment *	Select Segment	▼
Subscribe to Loyalty Program		<input type="checkbox"/>

6. Complete the [customer profile registration](#).

7. Click **info**.



8. Click **Basic Information** to check the generated digital card number.



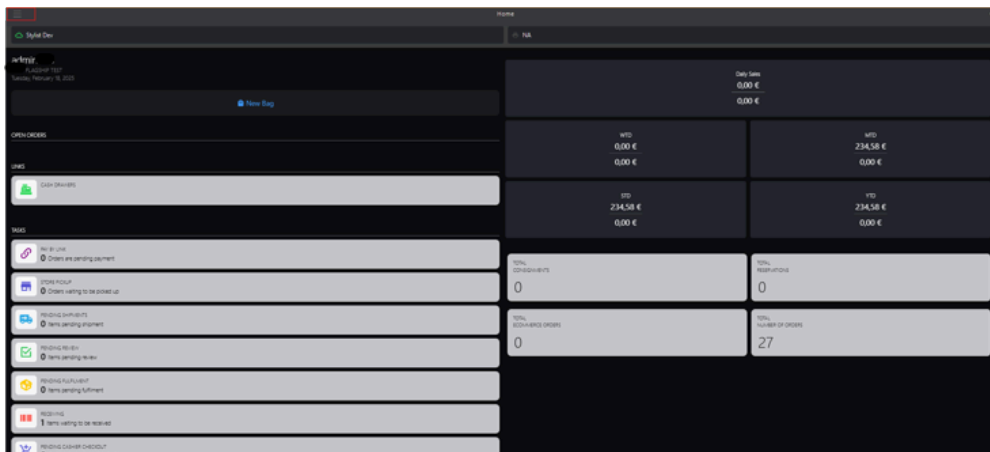
Upgrading from No Card to Physical Card

Introduction

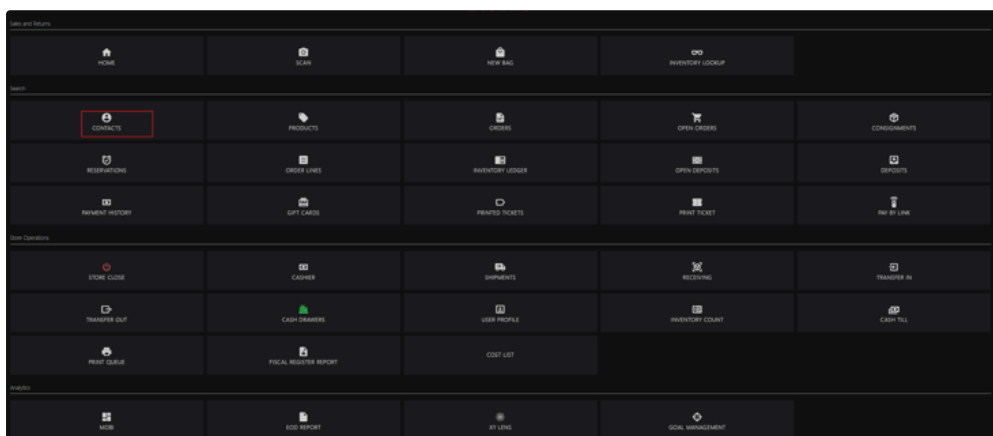
This topic outlines the step-by-step process for upgrading a customer's digital card to a physical card. The system deactivates the digital card after the physical card is activated.

Steps to Upgrade from No Card to a Physical Card

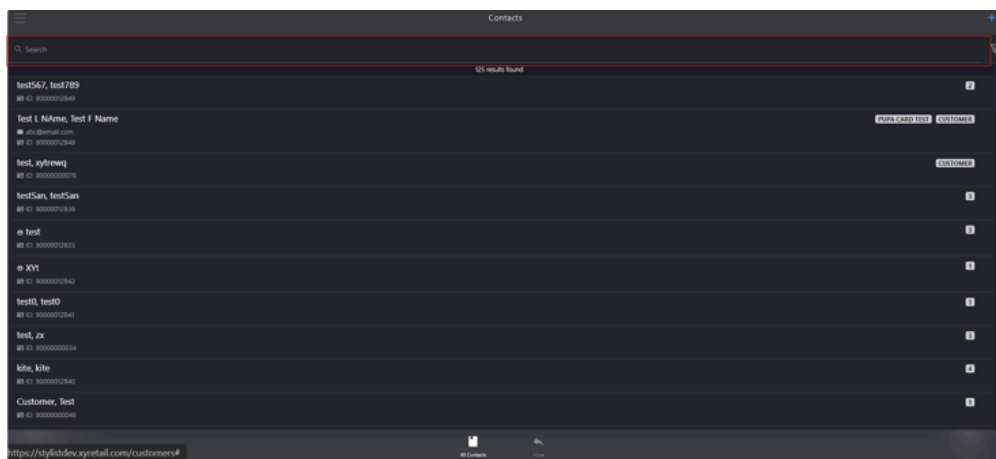
1. Click the burger menu.



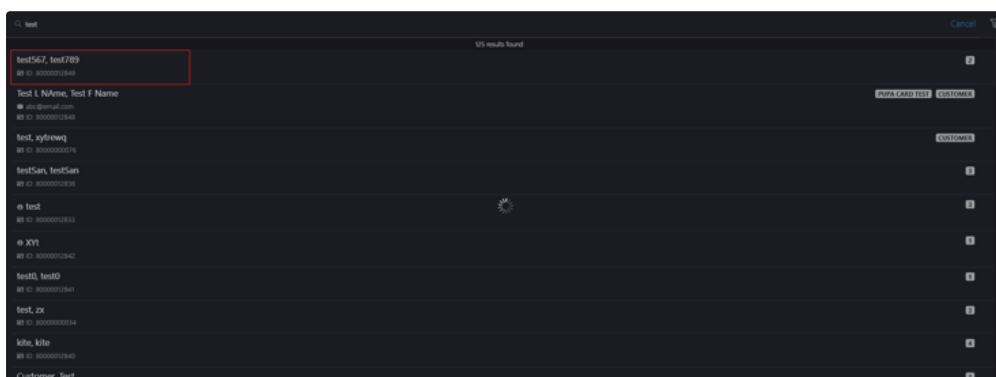
2. Click **Contacts**.



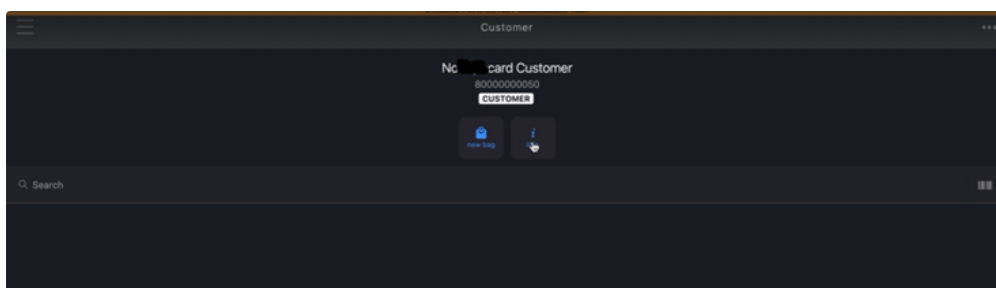
3. Enter the customer name in the search box.



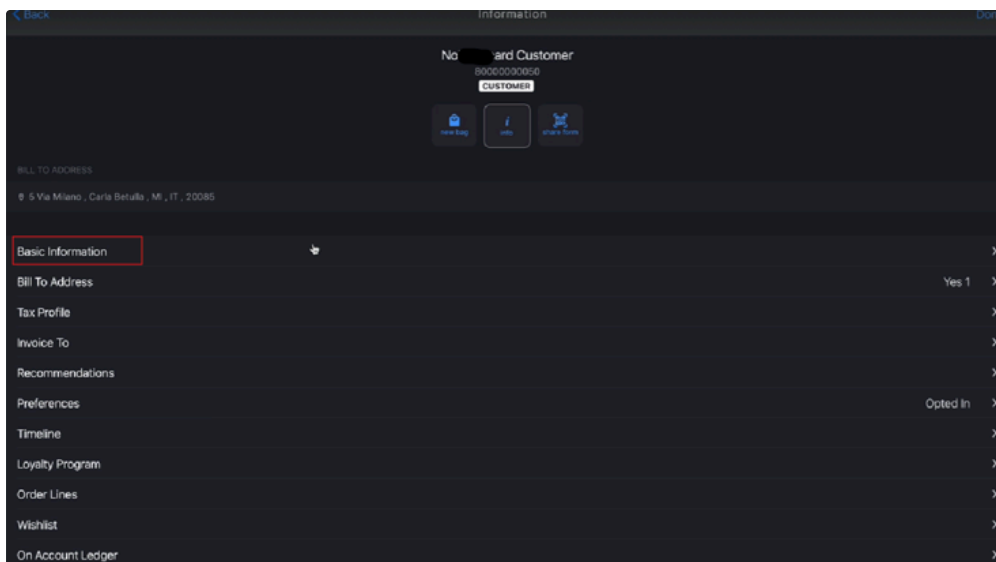
4. Click the respective customer name.



5. Click **info**.



6. Click **Basic Information** to go to **New Customer** page.



The screenshot shows the 'New Customer' form. The title is 'New Customer'. Below it is the section 'BASIC CUSTOMER INFORMATION'. The form fields are as follows:

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	NO CARD	
Last Name *	Customer	
Country	Italy	▼
Phone Number	+39	Phone Number
Secondary Phone Number	+39	Secondary Phone Number
Email	Email	
Gender	Select gender	▼
Age *	Age Range	▼
Birthday *	dd/mm/yyyy	📅
Age Range *	25-34	▼
Card	80000000050	📄
Subscribe to Loyalty Program		🔘

A 'Save' button is located at the bottom of the form.

7. Scan the new card barcode in the **Card** field.

New Customer

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	NoPupacard	
Last Name *	Customer	
Country	Italy	▼
Phone Number	+39 · Phone Number	
Secondary Phone Number	+39 · Secondary Phone Number	
Email	Email	
Gender	Select gender	▼
Age *	Age Range	▼
Birthday *	dd/mm/yyyy	📅
Age Range *	25-34	▼
Card	80000000050	
Subscribe to Loyalty Program		<input checked="" type="checkbox"/>

Save

New Customer

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	No card	
Last Name *	Customer	
Country	Italy	▼
Phone Number	+39 · Phone Number	
Secondary Phone Number	+39 · Secondary Phone Number	
Email	Email	
Gender	Select gender	▼
Age *	Age Range	▼
Birthday *	dd/mm/yyyy	📅
Age Range *	25-34	▼
Card	1231231231234	
Subscribe to Loyalty Program		<input type="checkbox"/>

Save

8. Click **Save** to complete the physical card registration.

New Customer

BASIC CUSTOMER INFORMATION

Customer Type	Individual	▼
Prefix *	Mr	▼
First Name *	N... Card	
Last Name *	Customer	
Country	Italy	▼
Phone Number	+39	Phone Number
Secondary Phone Number	+39	Secondary Phone Number
Email	Email	
Gender	Select gender	▼
Age *	Age Range	▼
Birthday *	dd/mm/yyyy	📅
Age Range *	25-34	▼
Card	1231231231234	📄
Subscribe to Loyalty Program		<input type="checkbox"/>

Save

9. Click **Basic Information** again to verify the new physical card number is registered.

N... Card Customer
60000000050
CUSTOMER

🛒 New Bag | 📄 Card | 📄 Share Items

BILL TO ADDRESS
📍 5 Via Milano, Carla Betulla, MI, IT, 20085

- Basic Information
- Bill To Address Yes 1
- Tax Profile
- Invoice To
- Recommendations
- Preferences Opted In
- Timeline
- Loyalty Program
- Order Lines
- Wishlist
- On Account Ledger

Promotions

Overview

Promotions are a collection of offers that define the rewards and the conditions necessary to receive the rewards. These promotions are categorized as **transaction-level promotions** which are based on either percentage or fixed amount, depending on how the promotions are applied. Promotional price adjustments or discounts are temporary and applied for a fixed period, such as clearance sales or seasonal sales, and are specific to a store or country. Each promotion has a template that defines how the promotions are set up with a percentage or fixed price level.

Transaction-Level Promotion

A **transaction-level promotion** applies a discount or benefit based on the total purchase amount or the entire cart. It considers the overall transaction rather than specific items.

Example:

- Spend \$100 and get \$10 off.
- Buy any three items and get 15% off the entire purchase.

Transaction-level promotions are structured in two ways: Fixed-amount promotions and percentage-based promotions.

Fixed amount Promotions

A fixed amount promotion provides a specific monetary discount, reducing the total price by a set amount.

Example:

- Spend \$100 and get **\$10 off**.
- Buy two items and receive a **\$5 discount**.

Percentage Based Promotions

A percentage based promotion provides a discount as a percentage of the total cost.

Example:

- Spend \$200 and get **10% off**.

- [Creating and Deploying Promotions](#)
 - [Creating an Inclusion/Exclusion Template](#)
- [Promotion Management: Edit, Copy, and Status Updates](#)

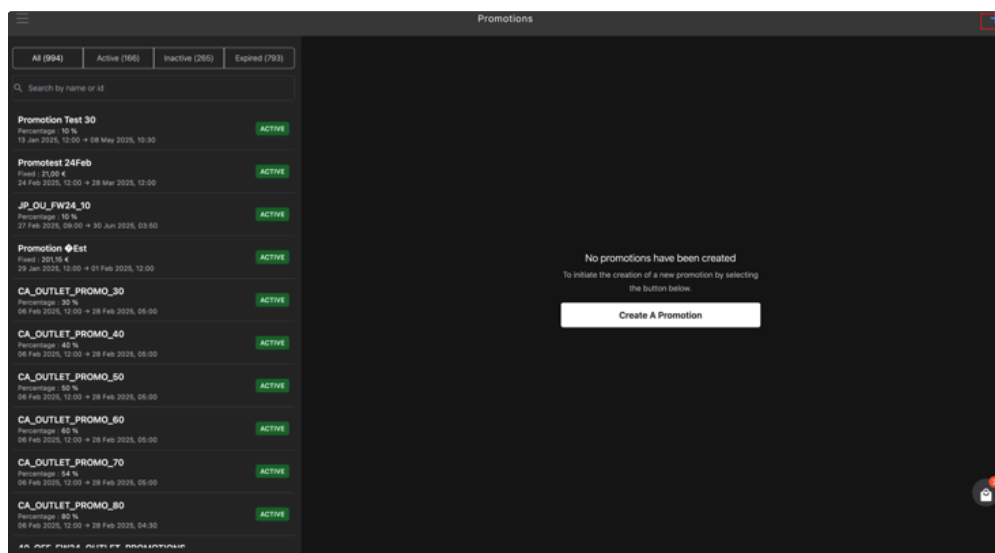
Creating and Deploying Promotions

Introduction

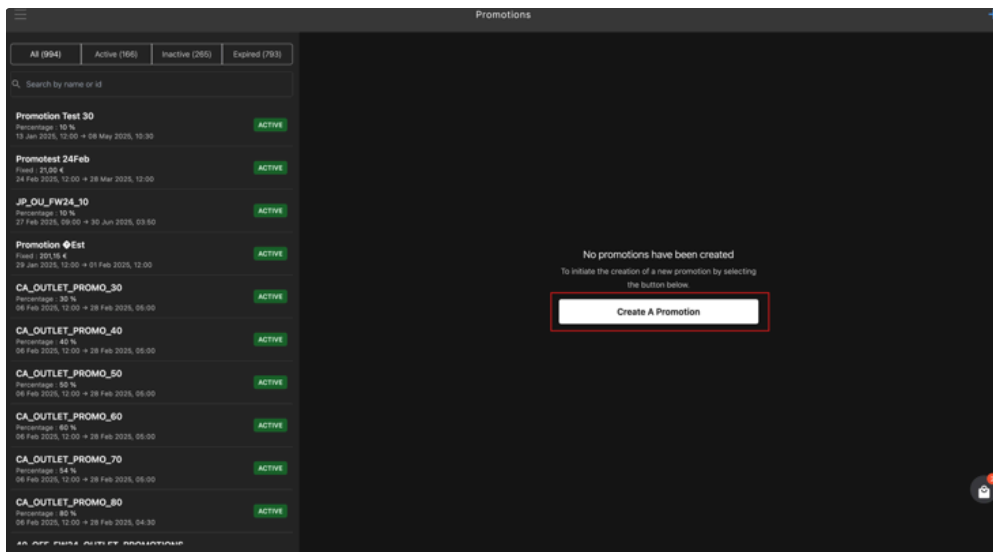
This topic covers setting up promotions in the XY POS system and the promotion deployment based on fixed amount or percentage-based offers.

Steps to Create and Deploy Promotions

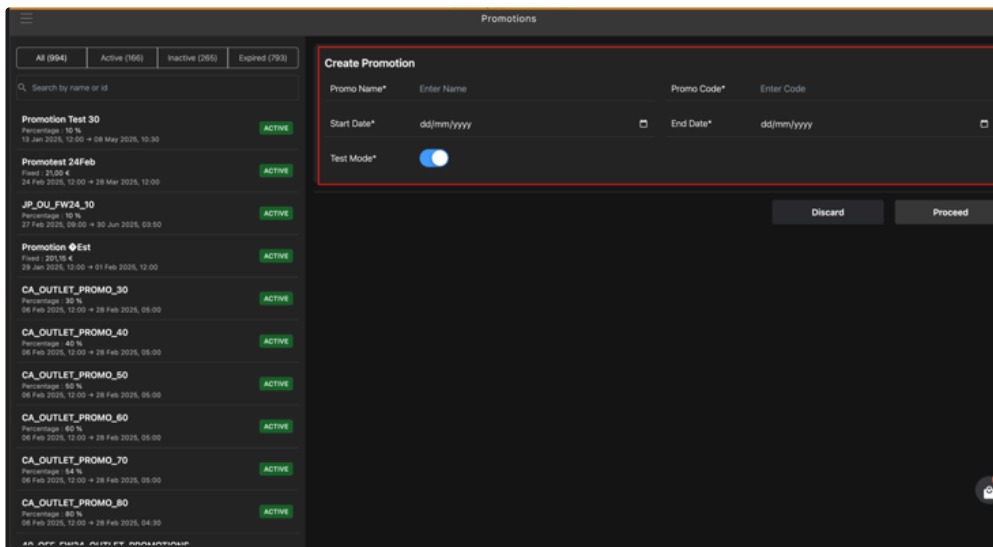
1. Click the burger menu.
2. Click the **Promotions**.
3. Click either the icon in the upper-right corner or the **Create A Promotion** button to create a new promotion.



OR



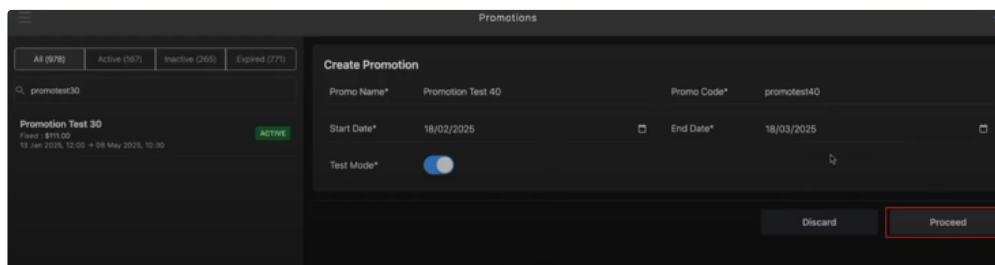
4. Enter the following in the **Create Promotion** section:



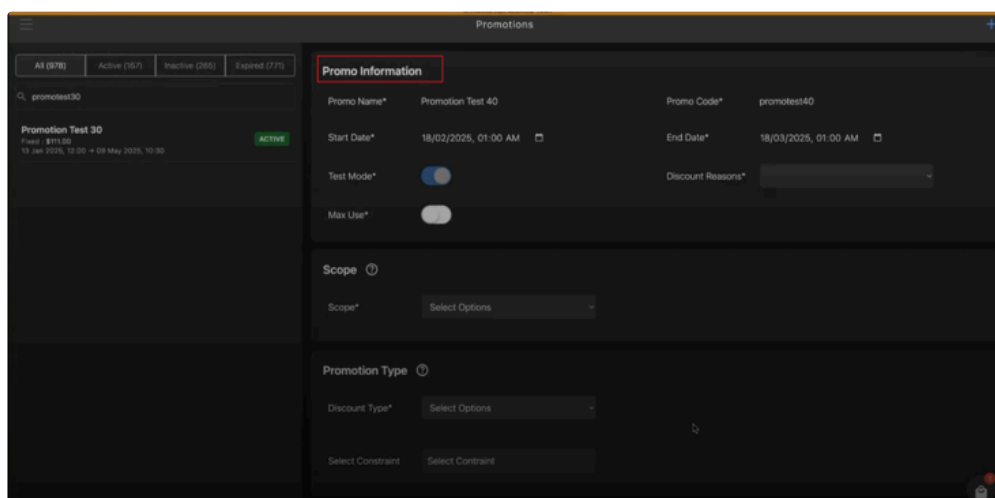
- Promo Name***: Enter the promotion name.
- Promo Code***: Enter a unique promotion code.
- Start Date***: Select the promotion start date.
- End Date***: Select the promotion end date
- Test Mode** :
 - Disable the toggle button to apply promotion for live store.
 - Enable the toggle button if the promotion is applied to the test store.

Note: By default, the **Test Mode** toggle button will be in the ON position.

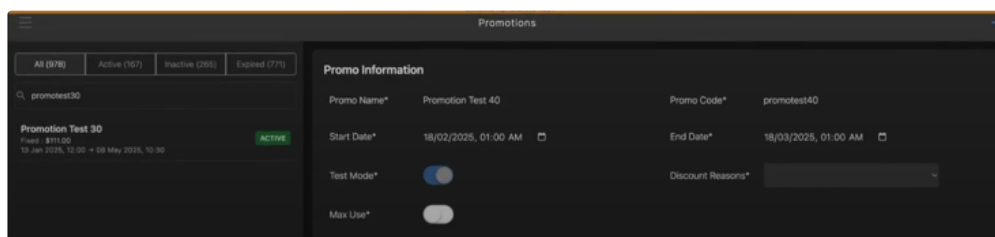
5. Click **Proceed** to save the promotion data.



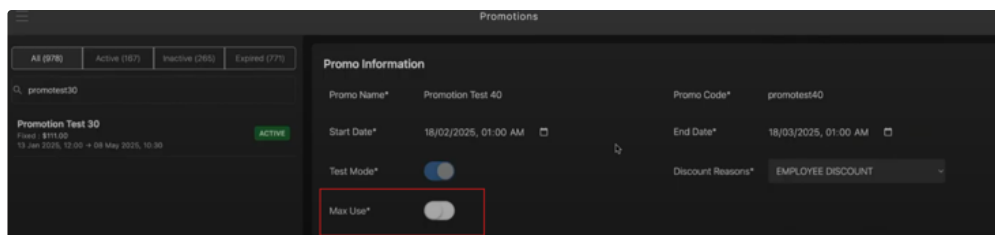
6. After saving the promotion data, the **Create Promotion** section will be updated to the **Promo Information** section.



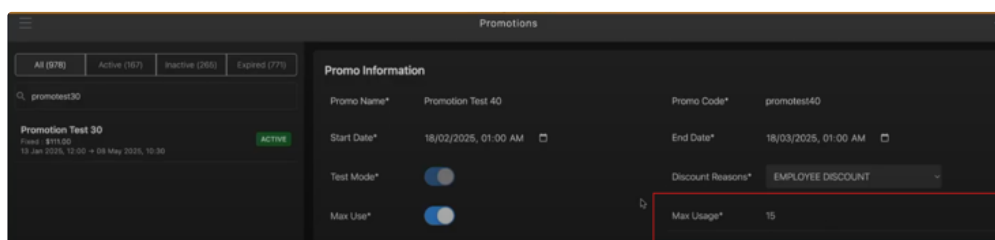
7. Select a discount reason from the **Discount Reasons*** dropdown list.



8. Enable **Max Use*** toggle button, if you want to apply maximum use condition to the promotion.



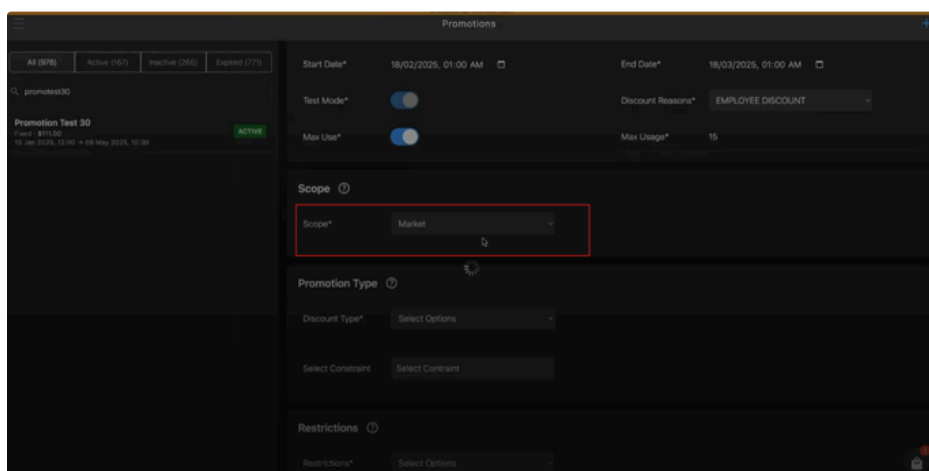
9. Enter a value in the **Max Usage*** field to define the maximum number of times the promotion can be applied.



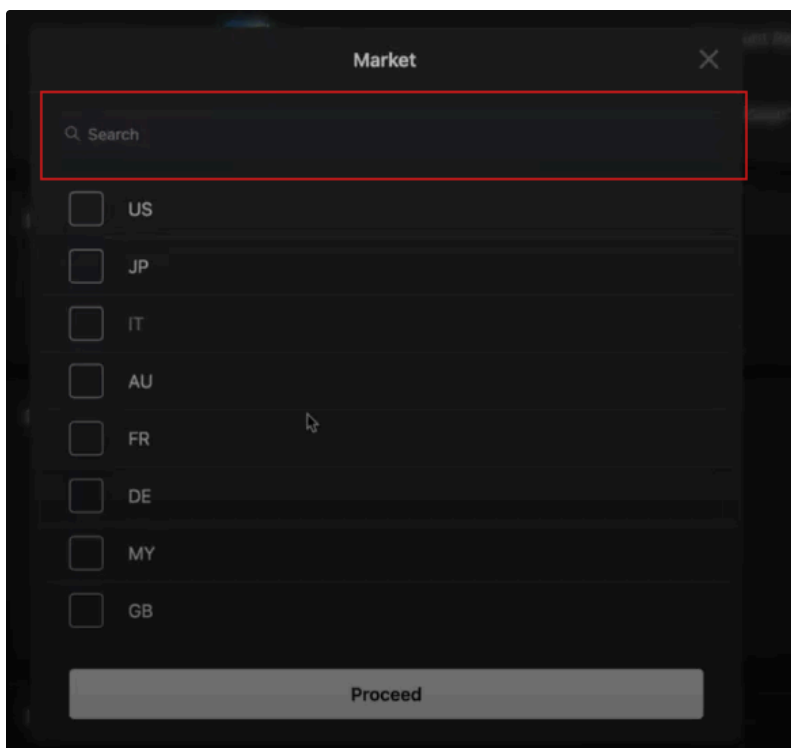
10. In the **Scope** section, click the **Scope*** dropdown list to select any one of the following options:

a. **Market:** **Market** option refer to the various countries involved.

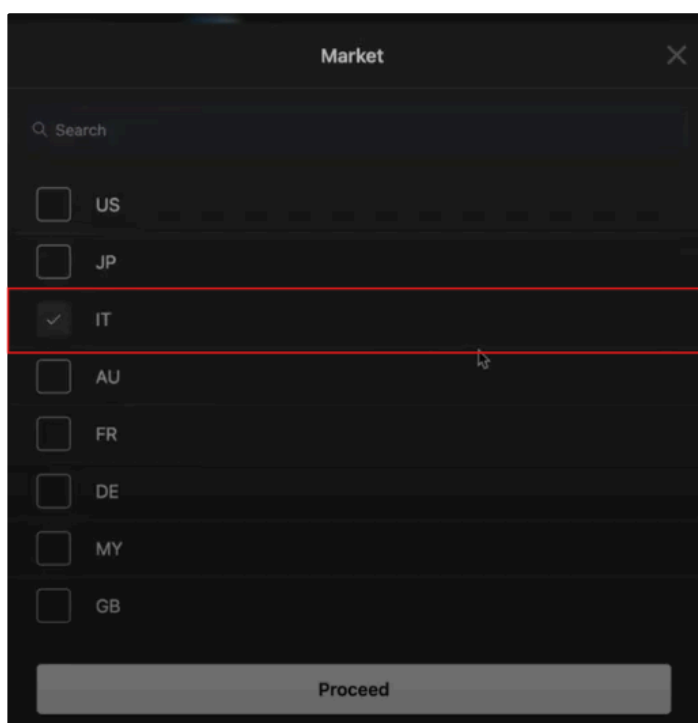
i. Select the **Market** option from the **Scope*** dropdown list.



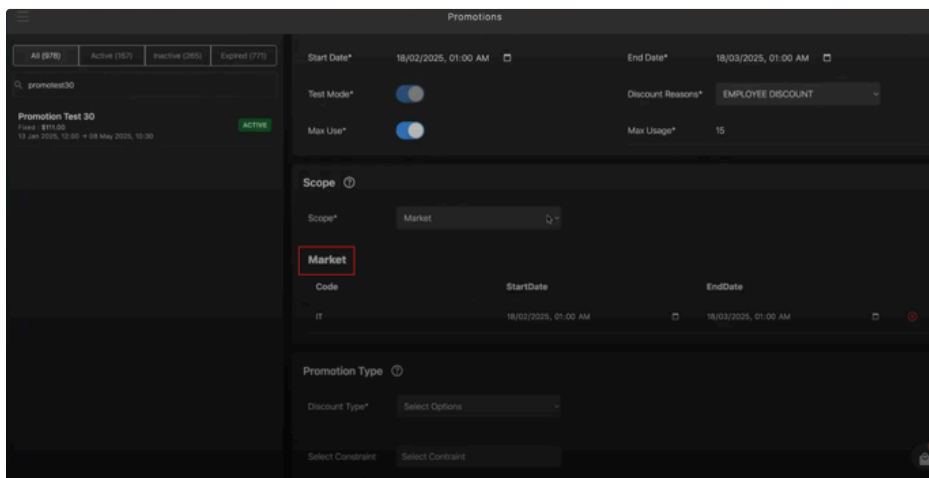
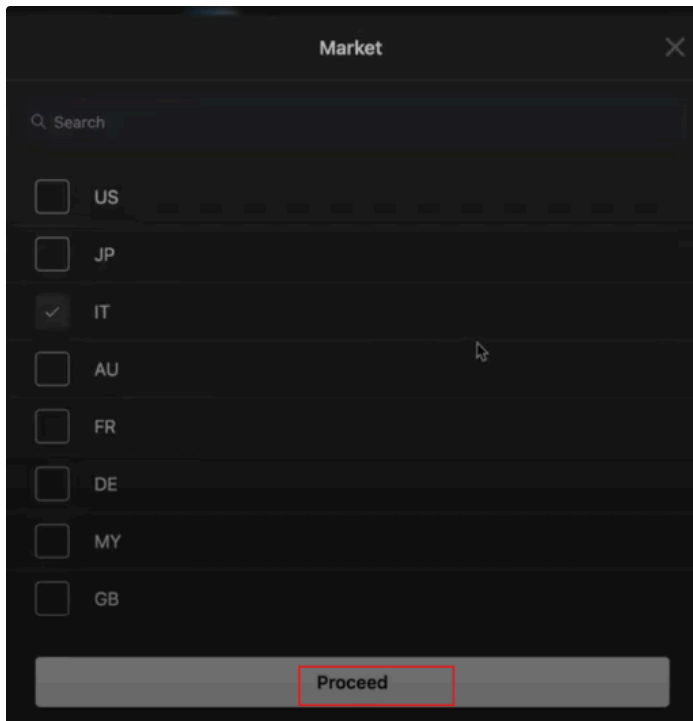
ii. Enter the country name or code in the **Market** pop-up window search box.



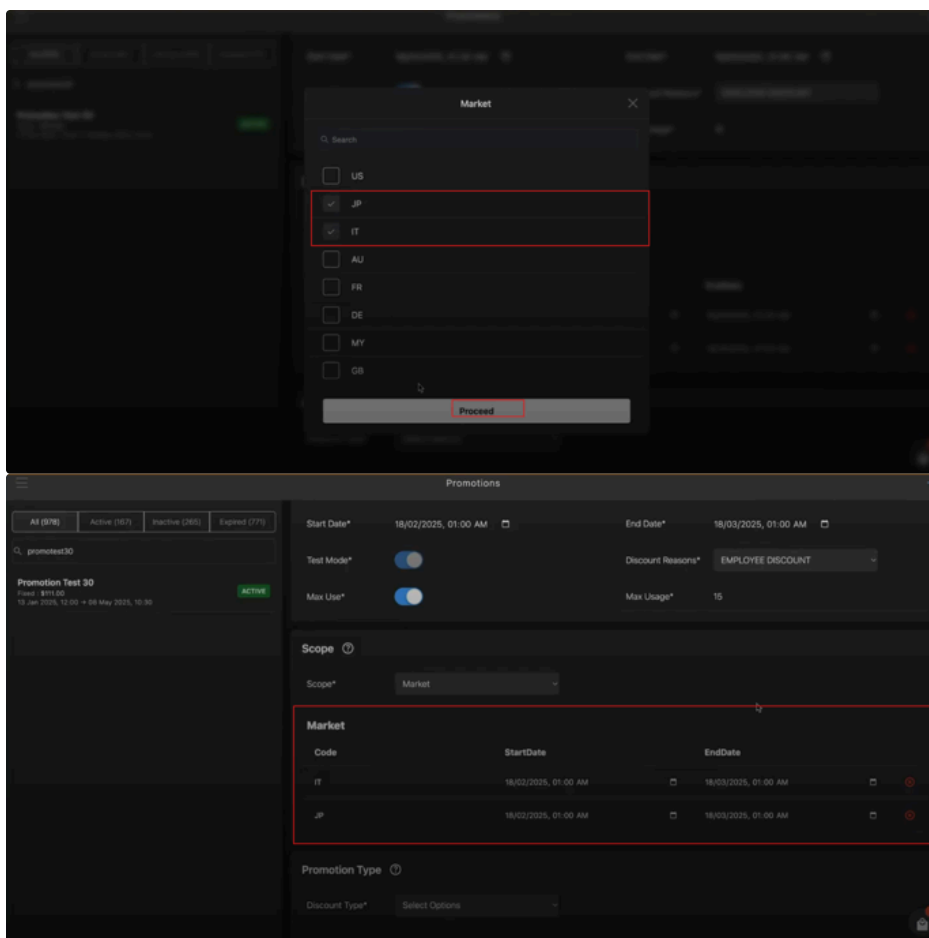
iii. Select the respective market checkbox.



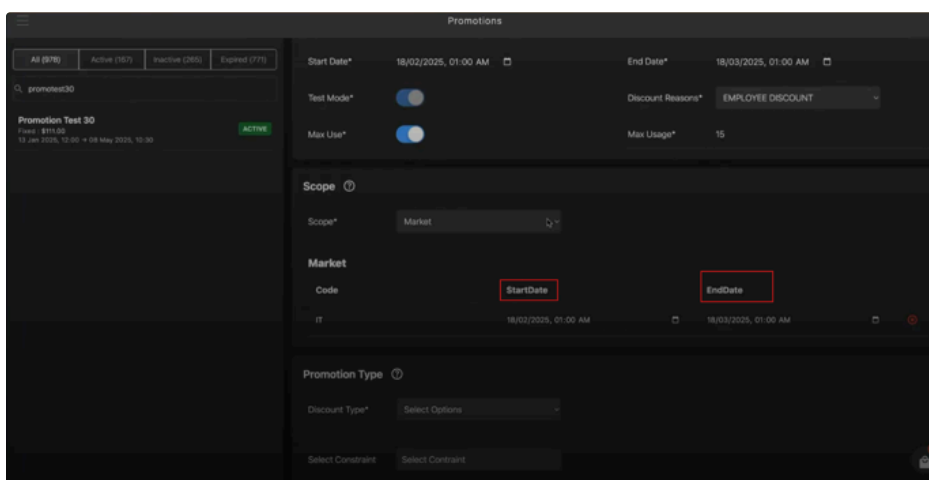
iv. Click **Proceed** to save the **Market** data.



- v. To apply the same promotions to multiple market, select the multiple market checkbox.
(Optional)



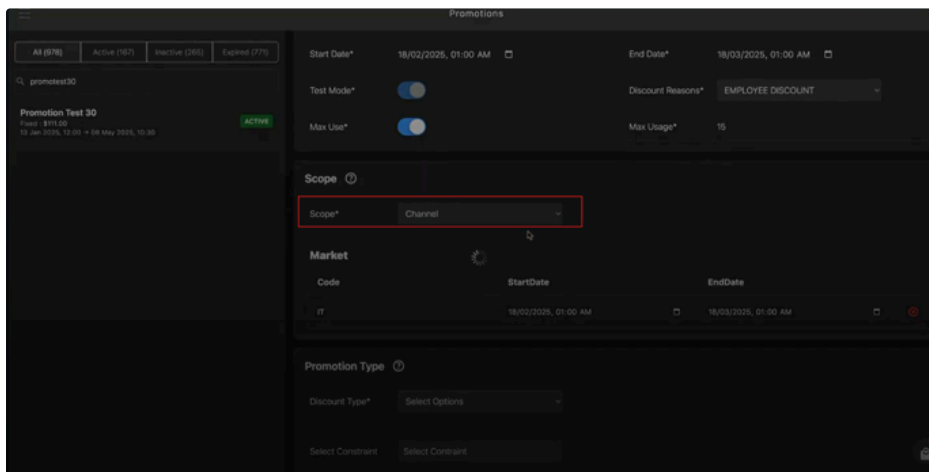
vi. In **Market** subsection, enter the following to apply the promotion to the selected Market:



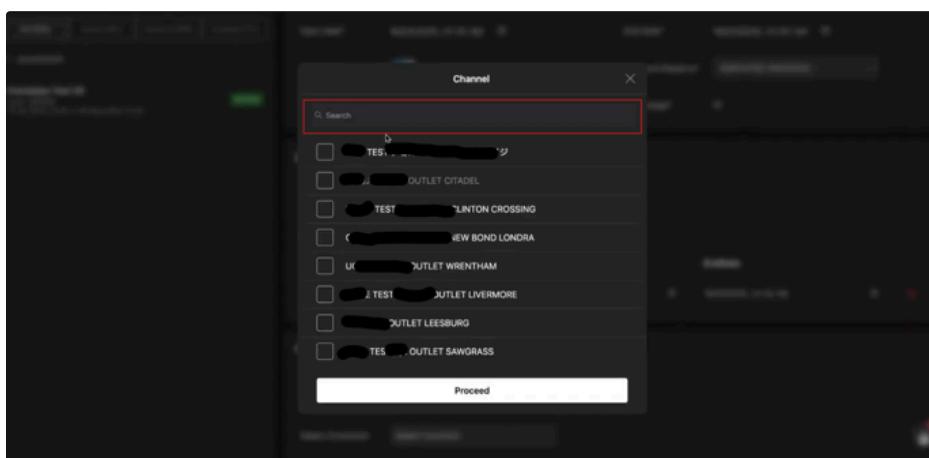
- **Start Date***: Select the promotion start date.
- **End Date***: Select the promotion end date.

b. **Channel:** Channel option refer to the various stores involved.

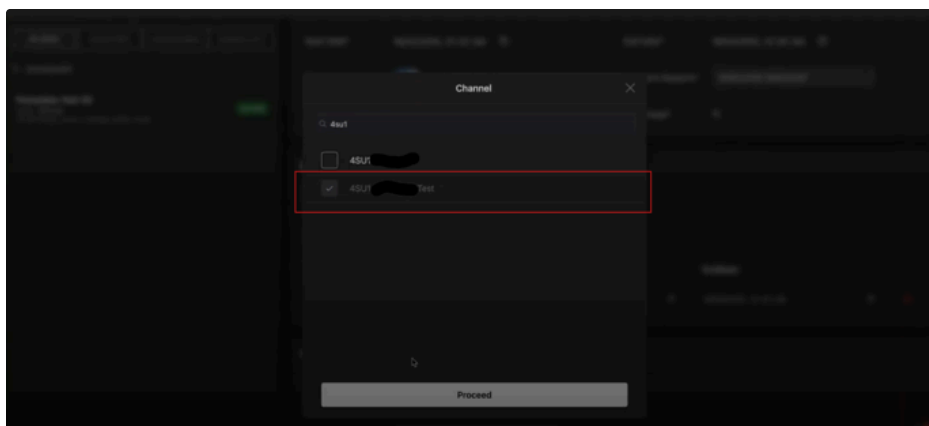
i. Select the **Channel** option from the **Scope*** dropdown list.



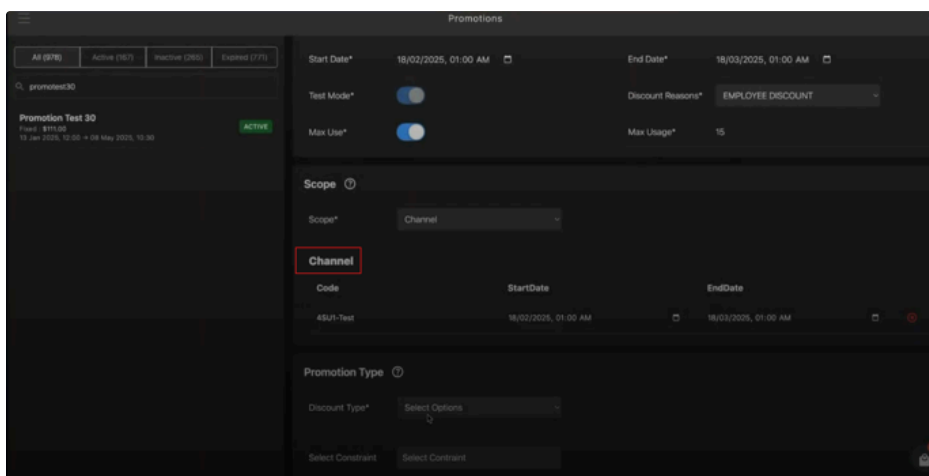
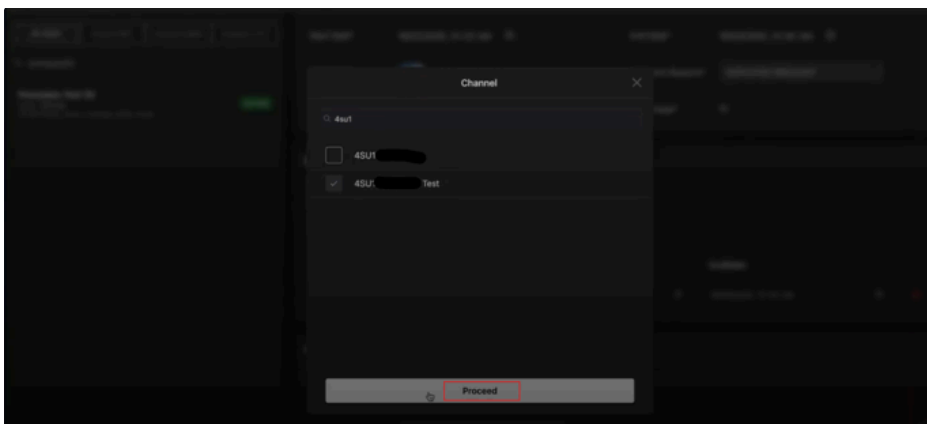
ii. Enter the store name or code in the **Channel** pop-up window search box.



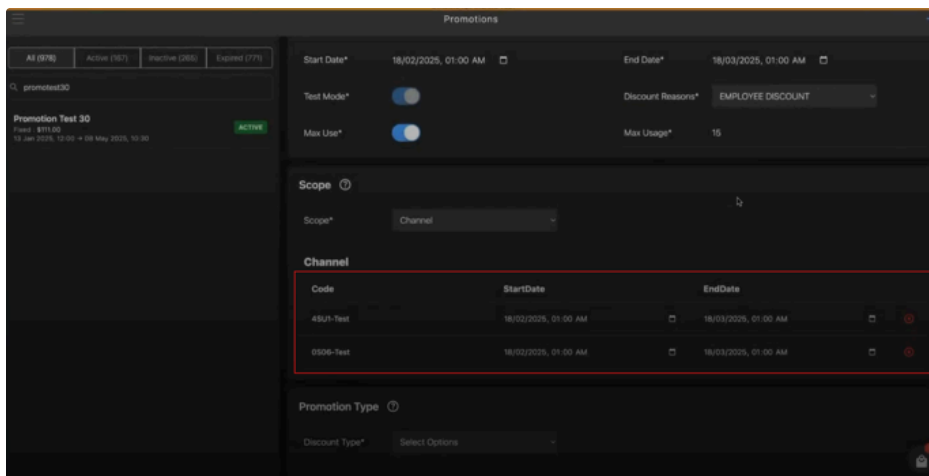
iii. Select the respective channel checkbox.



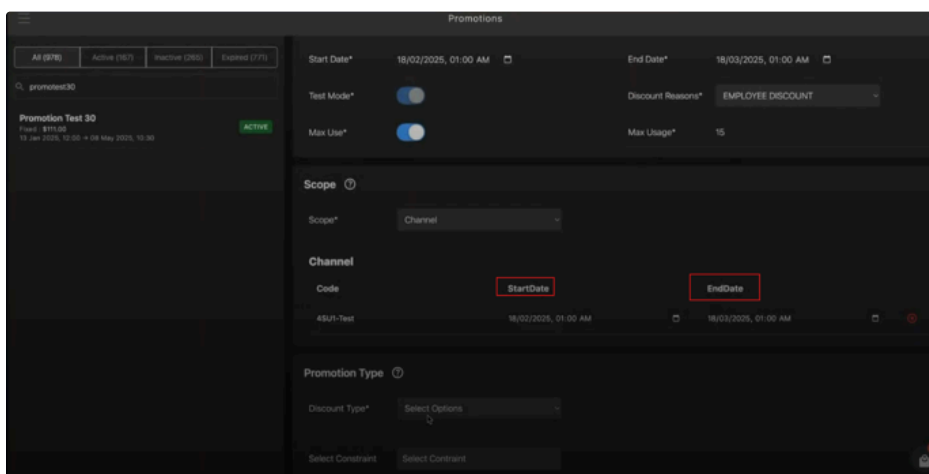
iv. Click **Proceed** to save the **Channel** data.



v. To apply the same promotions to multiple channel, select the multiple channel checkbox. **(Optional)**



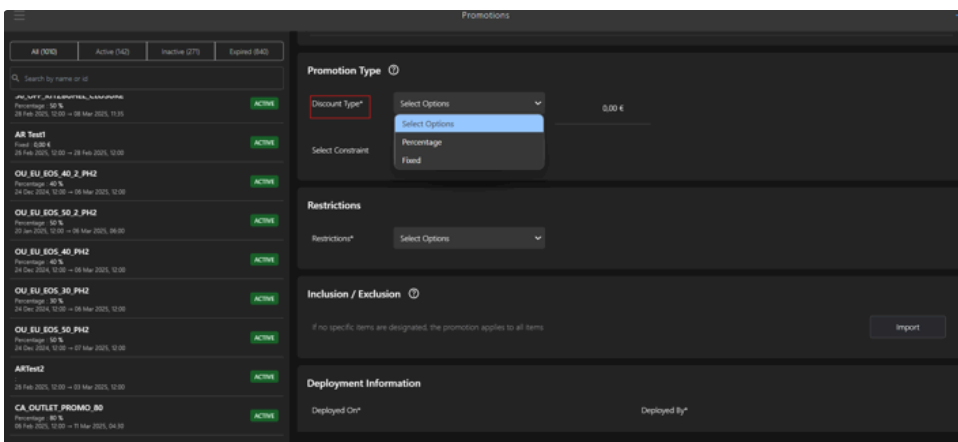
vi. In Channel subsection, enter the following to apply the promotion to selected channel:



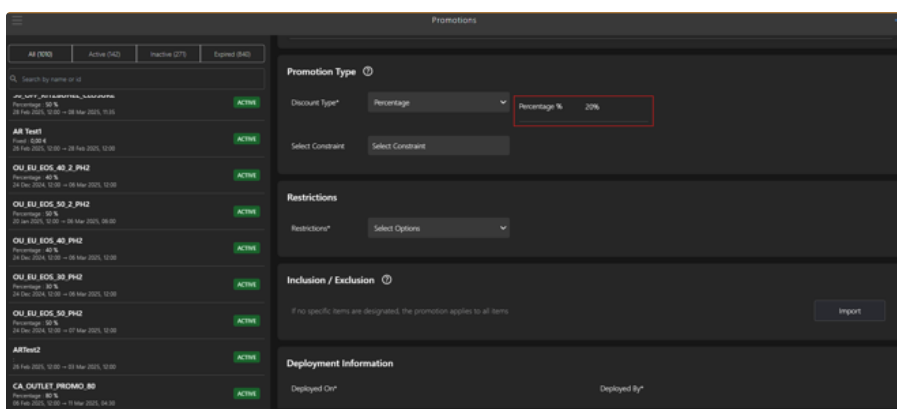
- **Start Date***: Select the promotion start date.
- **End Date***: Select the promotion end date.

11. Select the following parameters in the **Promotion Type** section:

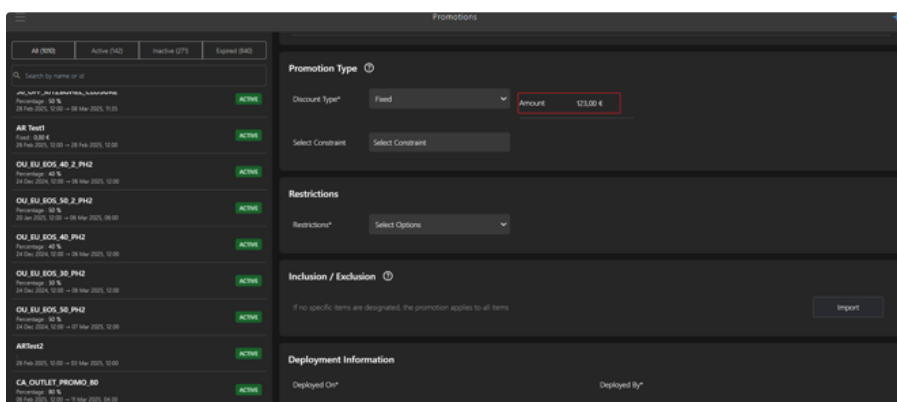
- Select one of the following discount options for the promotion from the **Discount Type*** dropdownlist:



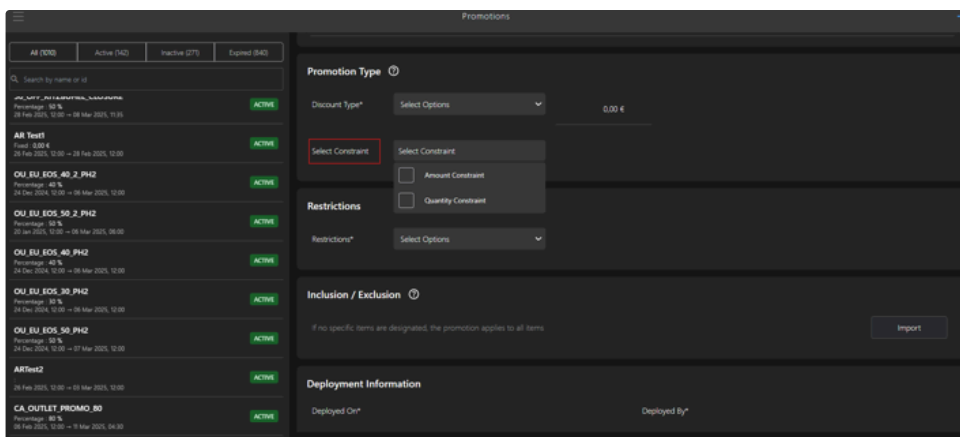
i. **Percentage:** Enter the percentage value in the **Percentage%** field.



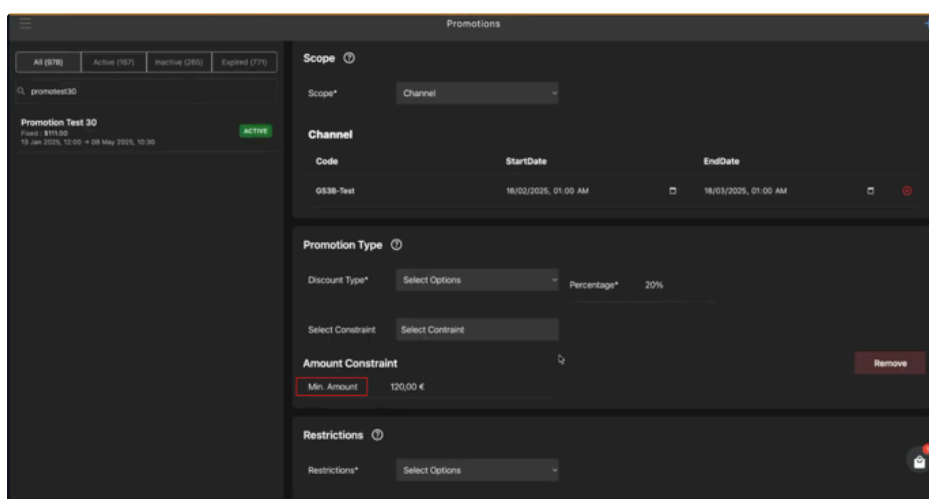
ii. **Fixed:** Enter the percentage value in the **Amount** field.



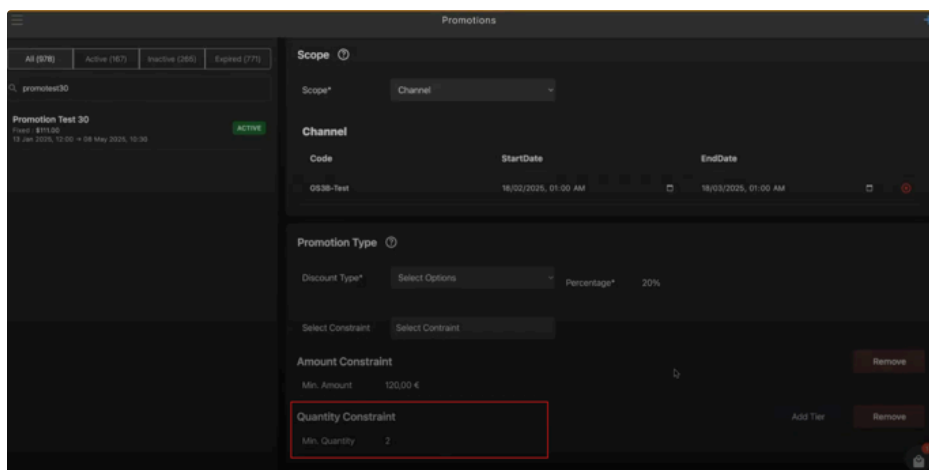
b. Select the following constraint options checkbox for the promotion from the **Select Constraint*** dropdown list:



i. **Amount Constraint:** Enter the minimum constraint amount value in **Min.Amount** field.



ii. **Quantity Constraint:** Enter the minimum constraint amount value in **Min.Quantity** field.



- iii. Click **Add Tier**, if you want to apply promotion with different quantity and percentages.

The screenshot shows the 'Promotions' configuration screen. On the left, there's a sidebar with filters for 'All (376)', 'Active (167)', 'Inactive (205)', and 'Expired (771)'. Below that, a search bar contains 'promotest30'. A promotion card for 'Promotion Test 30' is visible, showing 'Price: \$111.00' and '13 Jan 2025, 12:00 - 08 May 2025, 10:30'. The main area is titled 'Promotions' and has a 'Scope' dropdown set to 'Channel'. Below that is a table with columns 'Code', 'StartDate', and 'EndDate', containing one row with 'GS38-Test', '18/02/2025, 01:00 AM', and '18/03/2025, 01:00 AM'. The 'Promotion Type' section includes a 'Discount Type*' dropdown set to 'Select Options' and a 'Percentage*' field set to '20%'. There's a 'Select Constraint' dropdown set to 'Select Constraint'. Below that are 'Amount Constraint' (Min. Amount: 120,00 €) and 'Quantity Constraint' (Min. Quantity: 2). The 'Add Tier' button is highlighted with a red box. At the bottom, there are 'Restrictions' and 'Inclusion / Exclusion' sections.

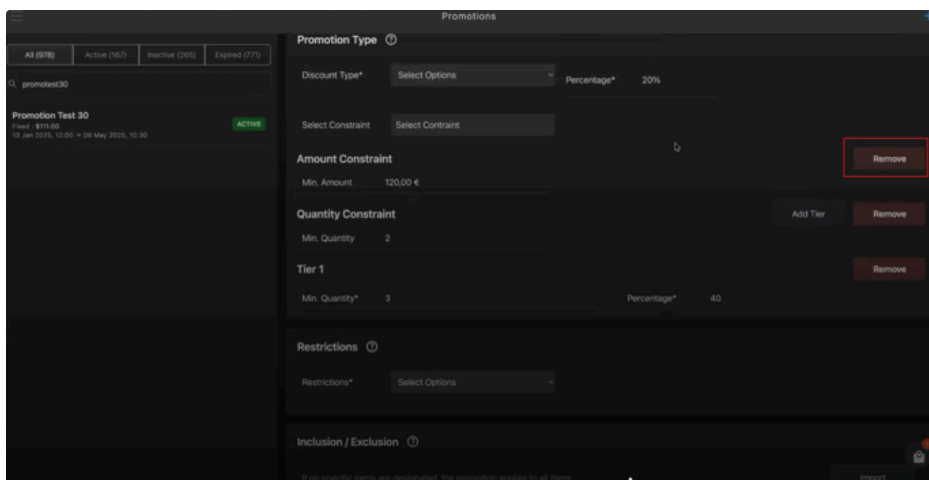
Note: The **Add Tier** becomes visible only after selecting **Quantity Constraint** option.

- iv. Enter the constraint amount value in the **Min.Amount** field and the percent value in the **Percentage*** field.

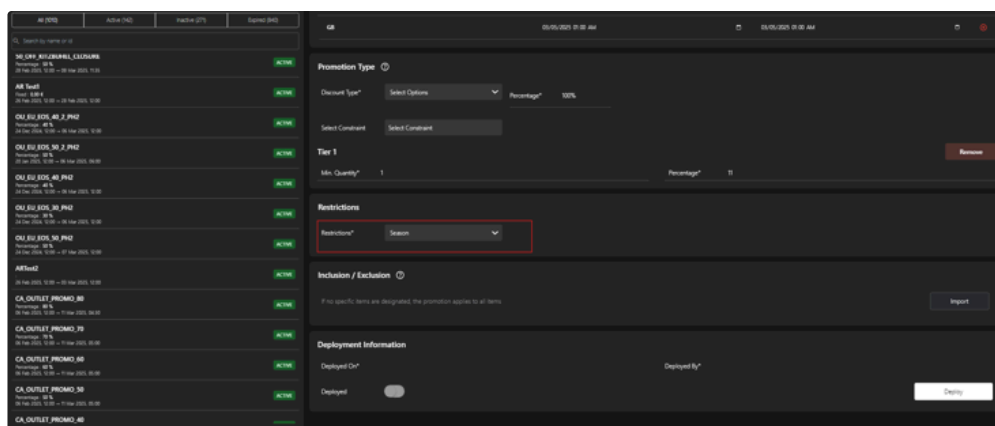
The screenshot shows the 'Promotions' configuration screen with a new tier added. The 'Discount Type*' dropdown is still 'Select Options' and 'Percentage*' is '20%'. The 'Amount Constraint' (Min. Amount: 120,00 €) and 'Quantity Constraint' (Min. Quantity: 2) are still present. A new 'Tier 1' section has been added, with 'Min. Quantity*' set to '3' and 'Percentage*' set to '40'. The 'Add Tier' button is now greyed out. The 'Restrictions' section has a 'Restrictions*' dropdown set to 'Select Options'. At the bottom, there are 'Inclusion / Exclusion' and 'Import' buttons.

Note: You can apply multiple **Tier** conditions to the promotions.

- v. Click **Remove** to remove the applied promotion constraints.



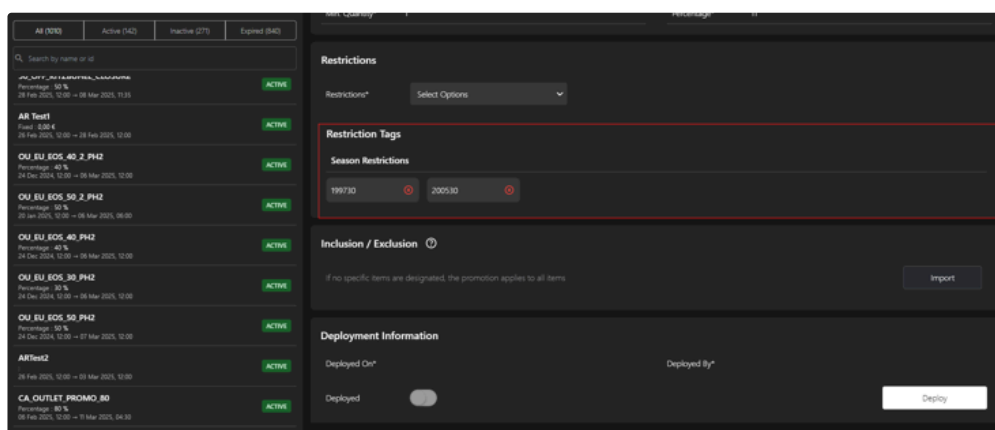
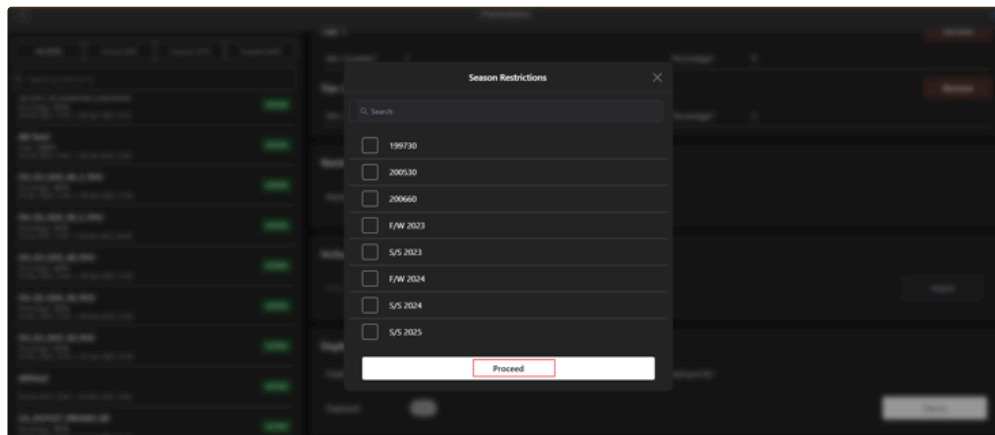
12. In the **Restriction** section, select an option from the **Restriction*** dropdown list to exclude it from the promotion, for example, Season.



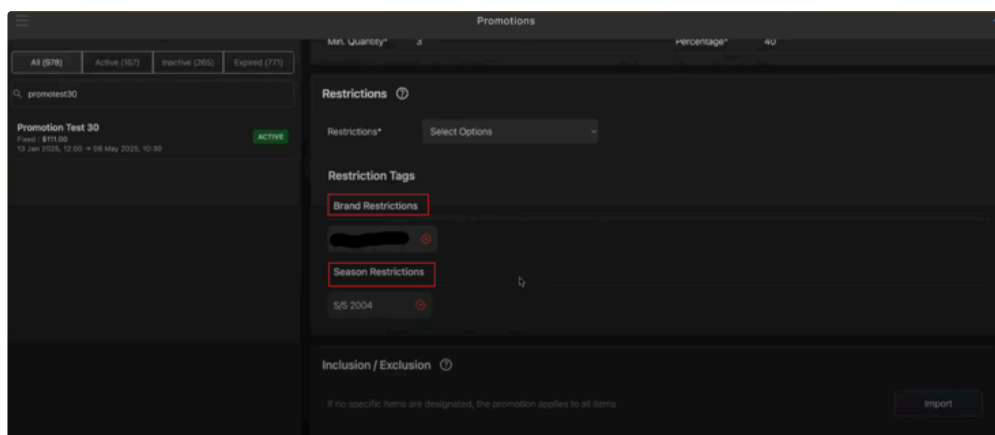
13. Select the respective checkboxes you want to restrict in the pop-up window, for example, **Season Restrictions**.



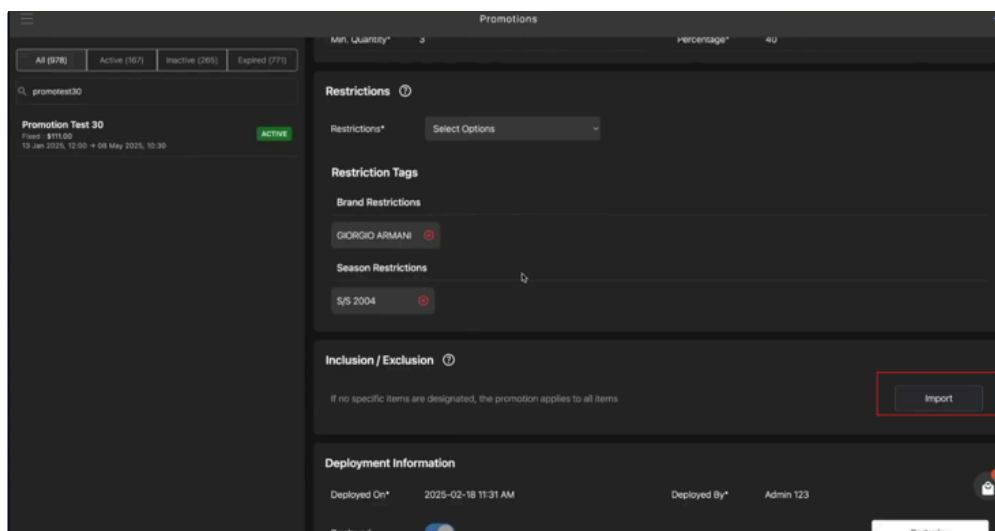
14. Click **Proceed** to apply promotion restriction for the selected option.



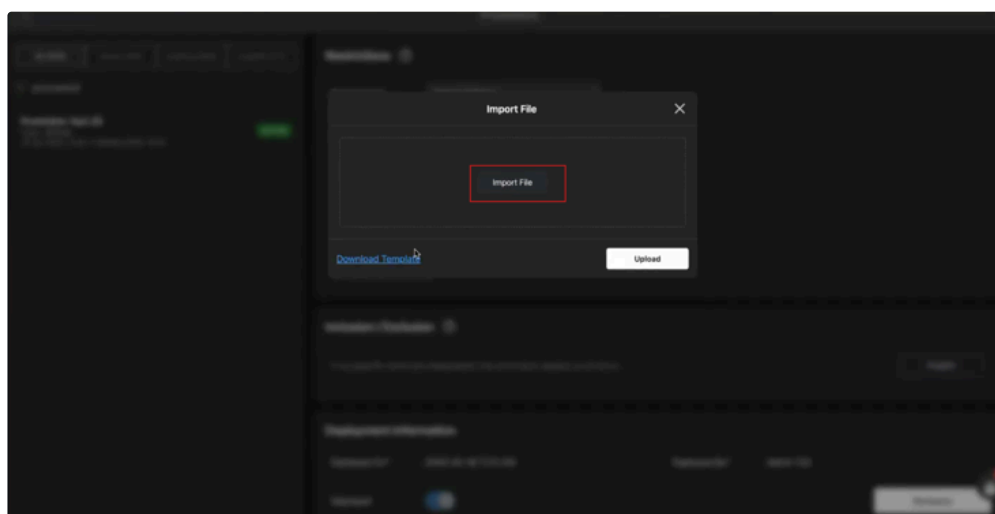
15. To apply multiple restriction repeat the steps from **12** to **14**. (**Optional**)



16. Click **Import** in the **Inclusion / Exclusion** section to add or exclude items from the promotions.

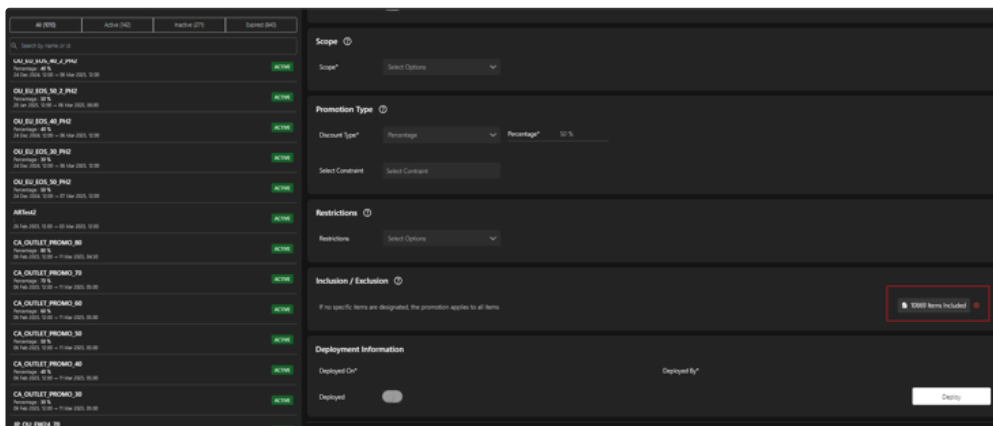
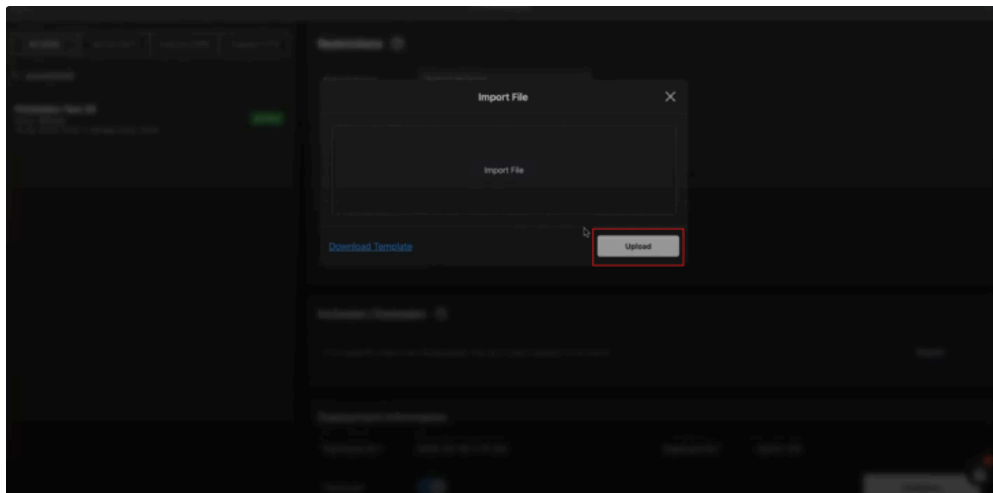


17. Click **Import File** button in **Import File** pop-up window.

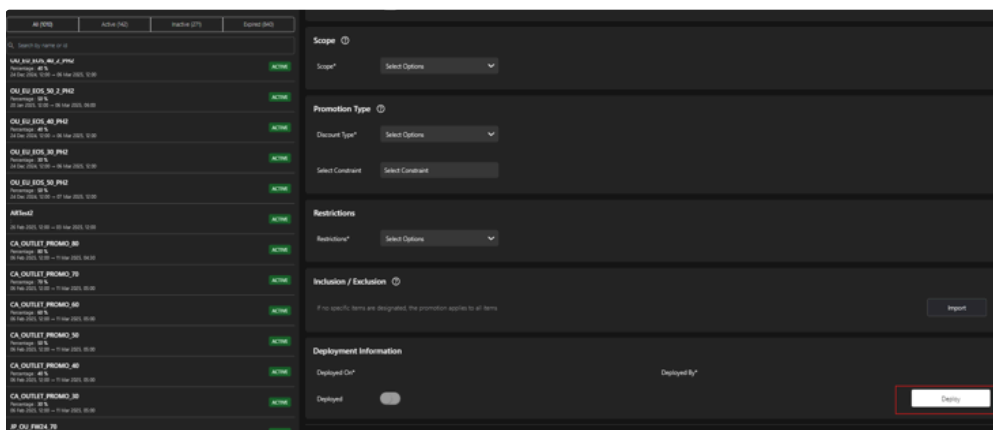


18. Select the [Inclusion and Exclusion](#) Excel file from the local computer

19. Click **Upload**.



20. Click **Deploy** in **Deployment Information** section to activate the promotion.



21. The POS system automatically records the following parameters in **Deployment Information** section:

The screenshot displays the 'Promotions' management interface. On the left, a list of promotions is shown with filters for 'All (979)', 'Active (168)', 'Inactive (265)', and 'Expired (771)'. The list includes promotions like 'Promotion Test 40', 'Promotion Test 30', 'Italy Employee End Of Season Discount', '4116_40_HK_APAC', '17FEB', '4107_40_APAC', '4115_40_MO_APAC', '40_OFF_SEMIANNUALSALEPHASE_3', 'AX_MO2_FW24', and 'AX_LICENSES_FW24'. Each promotion entry shows its percentage, start and end dates, and a status indicator (ACTIVE or EXPIRED).

The right panel shows the 'Restrictions' section for a selected promotion. It includes a 'Restrictions*' dropdown, 'Restriction Tags', 'Brand Restrictions' (GIORGIO ARMANI), and 'Season Restrictions' (S/S 2004). Below this is the 'Inclusion / Exclusion' section with an 'Import' button. The 'Deployment Information' section is highlighted with a red box and contains the following details:

Deployed On*	2025-02-18 11:31 AM	Deployed By*	Admin 123
Deployed	<input checked="" type="checkbox"/>		<input type="button" value="Redeploy"/>

- **Deployed On:** The date and time of the deployment.
- **Deployed By:** The user or system that performed the deployment.
- **Deployed:** After successful deployment, the **Deployed** toggle button is enabled.

Creating an Inclusion/Exclusion Template

Introduction

This subtopic outlines the procedure for creating an Inclusion/Exclusion template in Excel, designed to facilitate the addition of items to be included or excluded from the upcoming promotions under consideration.

Inclusion/ Exclusion Template

Column	Field Description
ID_PROMOTION	This column is for the unique promotion ID.
STYLE	This column is for the product style.
FABRIC	This column is for the product fabric.
COLOR	This column is for the product color.
TYPE	Enter INCLUDE or EXCLUDE to specify whether the item is included or excluded from the promotion.

Sample Template

A	B	C	D	E
ID_PROMOTION	STYLE	FABRIC	COLOR	TYPE
Promo24Feb	EM001542	AF15074	FC163-FLOWE	EXCLUDE

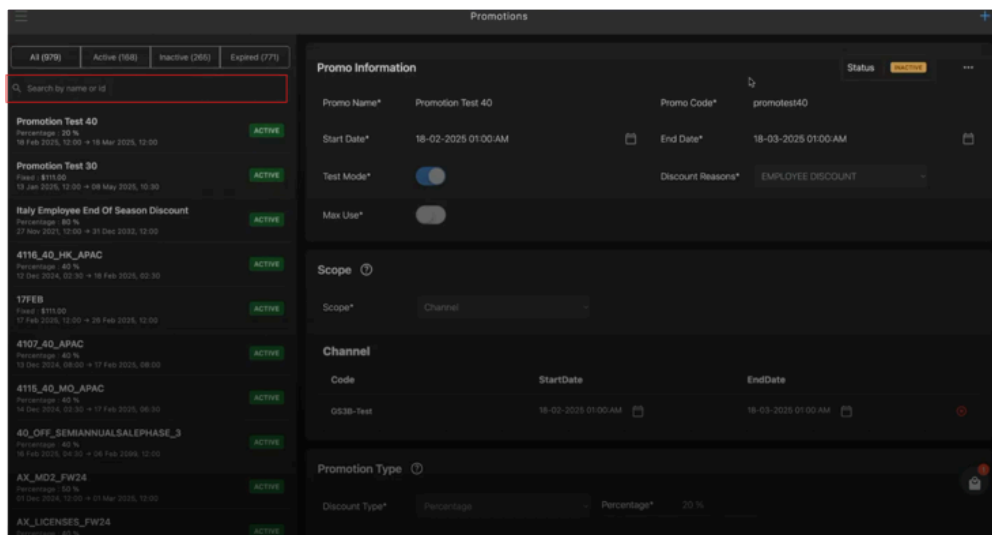
Promotion Management: Edit, Copy, and Status Updates

Introduction

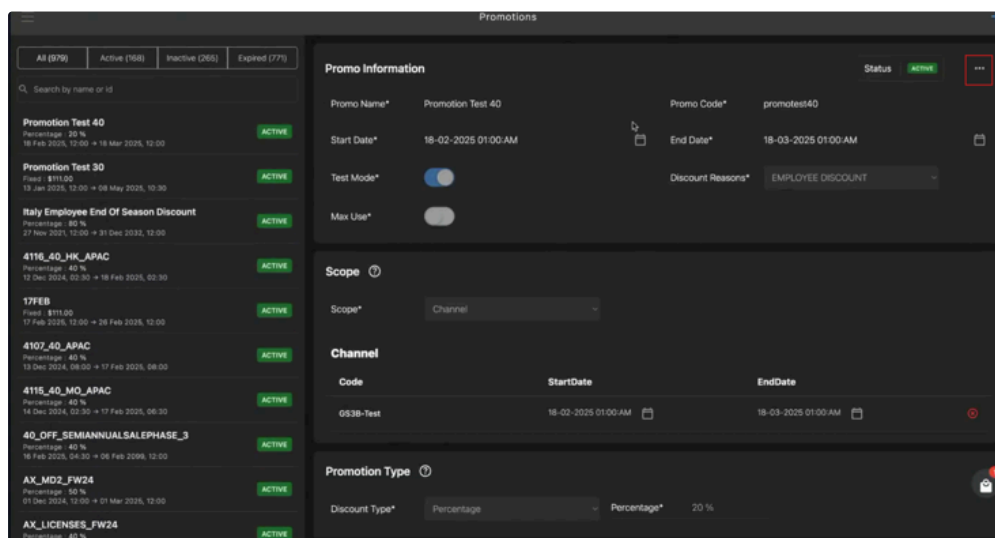
This topic covers the process of modifying existing promotions, including extending the duration of a promotional period, copying existing promotion parameters to create a new promotion, and updating the promotion status between active and inactive.

Steps to Edit, Copy, and Status Updates

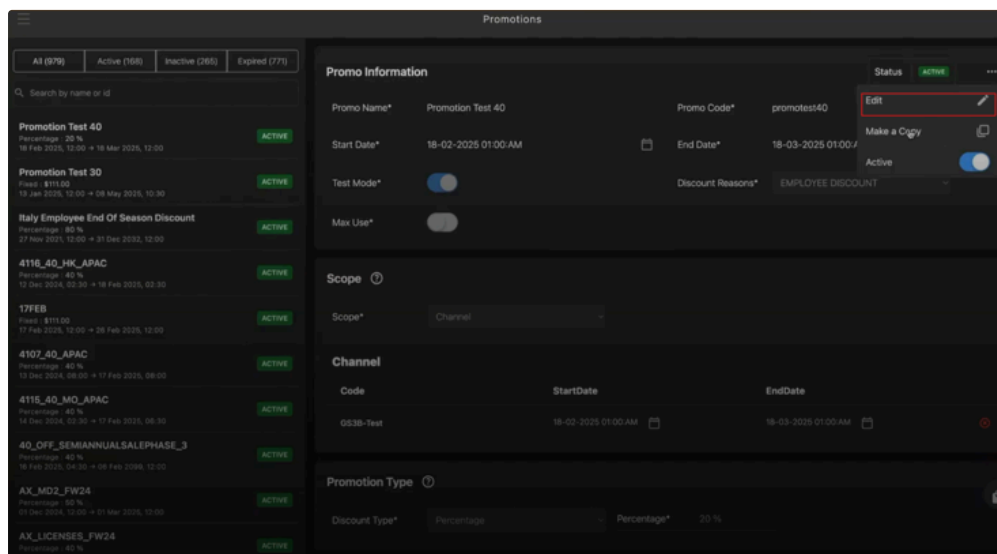
1. Enter the promotion code or name in the search box to locate and modify, copy, or update the status of the specific promotions.



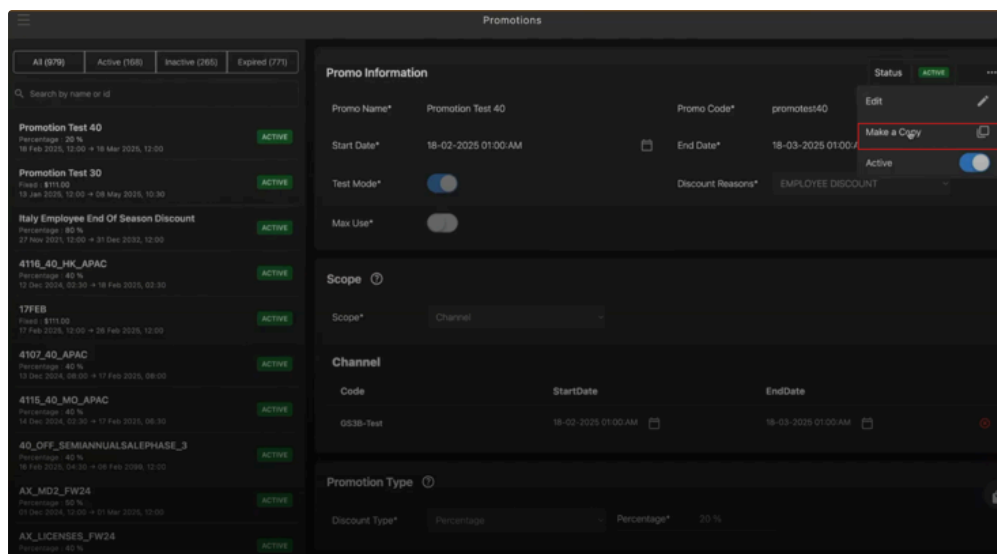
2. Click the meatball menu in the upper-right corner of the **Promo Information** section.



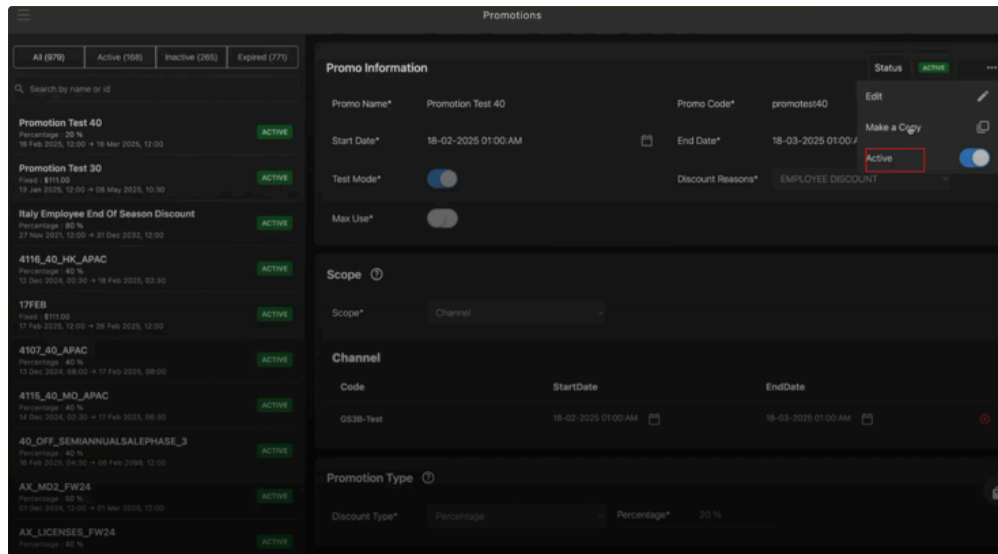
3. Select **Edit** from the menu to update promotion parameters.



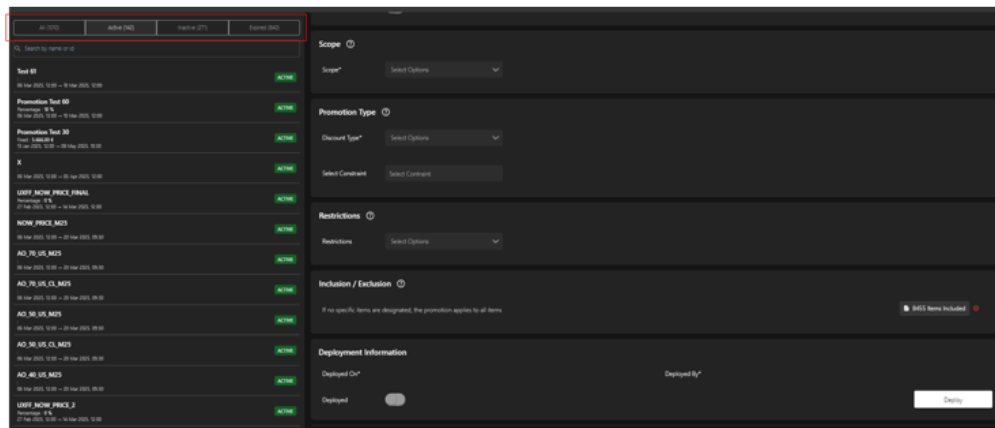
4. Select **Make a Copy** to copy all the promotion parameters applied from **Scope** section to **Inclusion/Exclusion** section.



5. Enable or disable the promotion using the **Active** toggle button.



6. Status Bar in the left pane of the **Promotions** screen provides following status information:



- **All** – Displays all promotions.
- **Active** – Displays the lists of promotions that are currently active.
- **Inactive** – Displays the lists of promotions that are currently inactive.
- **Expired** – Displays the lists of promotions that are no longer valid.

Tap to Pay on iPhone Overview

This section provides an overview of the **Tap to Pay on iPhone** feature in the **XY Stylist** application. It explains how sales associates accept contactless payments using an iPhone and outlines both the required **Getting Started** experience for first-time use and the overall payment process.

The **Getting Started with Tap to Pay on iPhone** section describes the mandatory tutorial article that appears on first use or after being postponed, ensuring the feature is used correctly before payments are processed.

The **Payment Flow** section explains the steps to complete a Tap to Pay on iPhone transaction, including support for split payments.

- [Getting Started with Tap to Pay on iPhone](#)
- [Tap to Pay on iPhone: Payment Flow](#)
 - [Split Payment Using Tap to Pay on iPhone](#)

Getting Started with Tap to Pay on iPhone

Introduction

Tap to Pay on iPhone enables sales associates to accept contactless payments directly on an iPhone using the XY Stylist POS application. To support safe and correct usage, the application opens a **Getting Started** article that explains how to use Tap to Pay on iPhone effectively.

This **Getting Started** article opens automatically the first time Tap to Pay on iPhone is used on a device or if the guidance was previously postponed.

When This Screen Appears

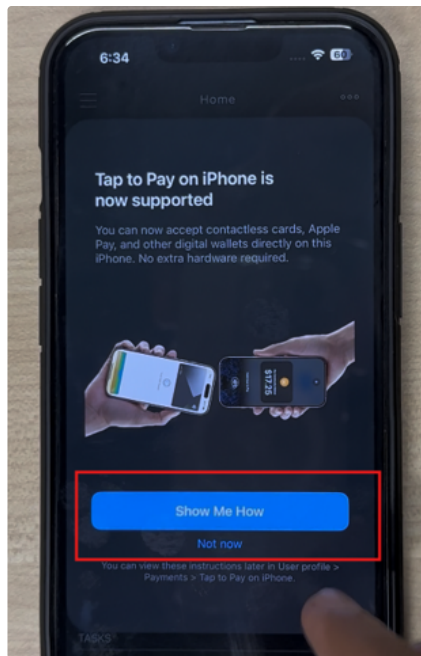
The **Getting Started with Tap to Pay on iPhone** article is displayed in the following situations:

- When Tap to Pay on iPhone is enabled for the store and accessed for the first time
- When a sales associate selects Tap to Pay on iPhone during checkout after previously postponing the guidance

Note: The payment process continues only after the **Getting Started** article has been reviewed and completed.

Getting Started Flow

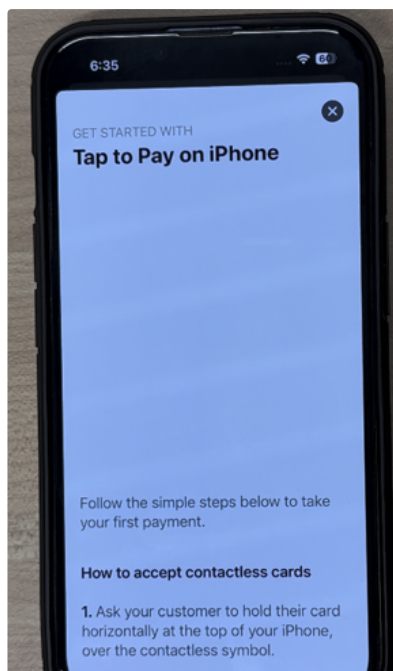
1. Open the **XY Stylist POS** application on the iPhone.
2. Sign in using the assigned store credentials.
3. When Tap to Pay on iPhone is supported, a **“Tap to Pay on iPhone is now supported”** screen appears.
4. Select one of the following options:



a. **Show Me How**

b. **Not Now**

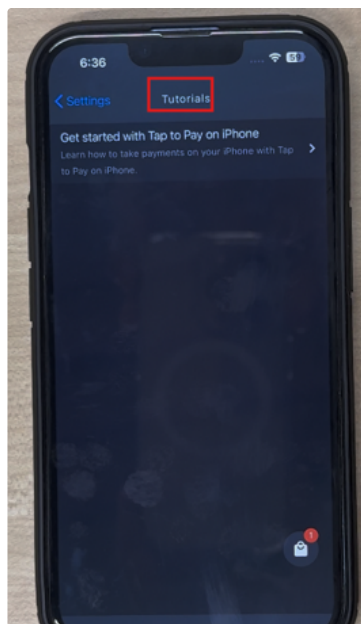
5. If you select **Show Me How**, the **Getting Started** article opens automatically.



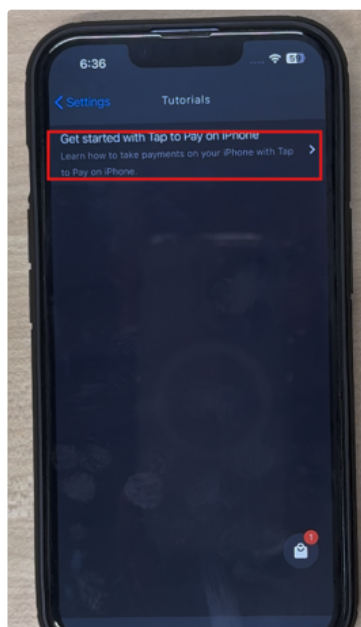
6. After reviewing the article, the iPhone is ready to accept Tap to Pay on iPhone payments.

7. If **Not Now** is selected, the **Getting Started** article is temporarily postponed.

8. The next time **Tap to Pay on iPhone** is selected during checkout, the setting opens to **Tutorials**



9. Tap the **Get started with Tap to Pay on iPhone**.



10. Review and complete the article before the payment screen is displayed.

11. After completion, the payment process continues normally.

Manual Access: If a sales associate wants to revisit the Getting Started article to learn how to use Tap to Pay on iPhone, go to **User Profile** → **Payments** → **Tap to Pay on iPhone** → **Tutorials** → **Get Started**.

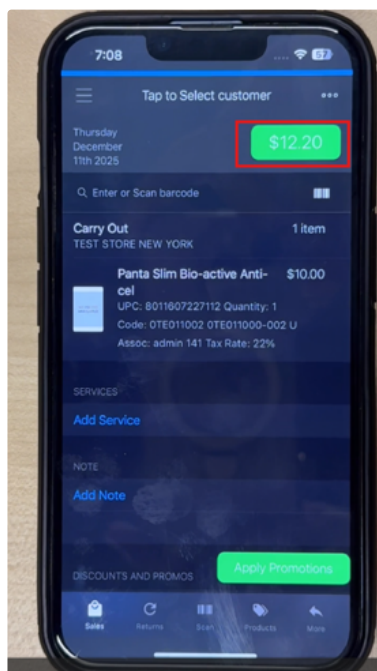
Tap to Pay on iPhone: Payment Flow

Introduction

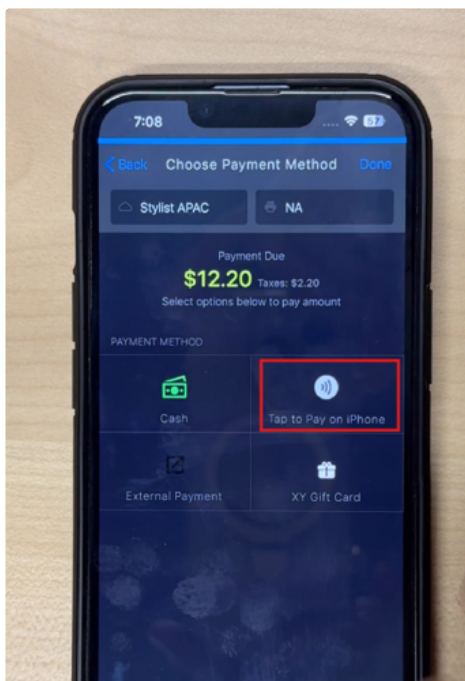
Tap to Pay on iPhone is an NFC-enabled Apple payment feature that allows the XY Stylist POS application to accept contactless payments directly on an iPhone, without requiring additional hardware or payment terminals. This enables sales associates to securely accept payments using Apple Pay and contactless credit or debit cards through an Apple-native payment experience

Payment Flow

1. Open the **XY Stylist** application on the iPhone.
2. Sign in using the assigned store credentials.
3. Tap **New Bag**.
4. Select **Sales Order**.
5. Add the customer.
6. Tap **Products**, choose any item, and add it to the cart
7. Tap the Bag icon.
8. Tap the **Amount** icon to proceed to checkout.

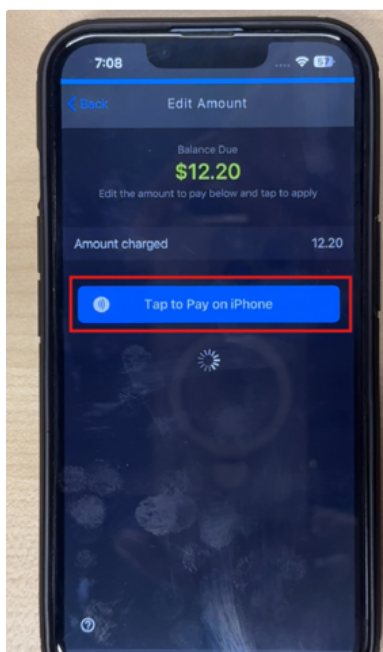


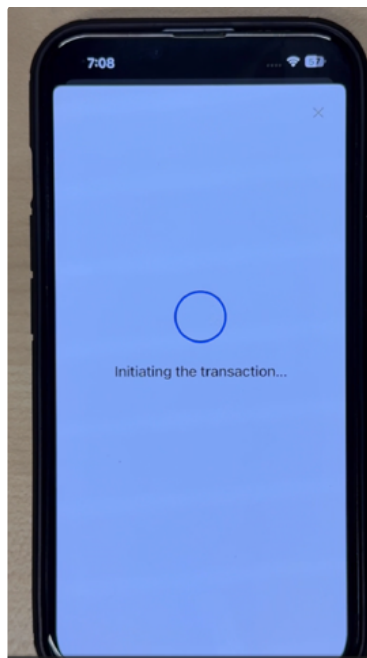
9. On the **Choose Payment Method** screen, Select **Tap to Pay on iPhone** as the payment method.



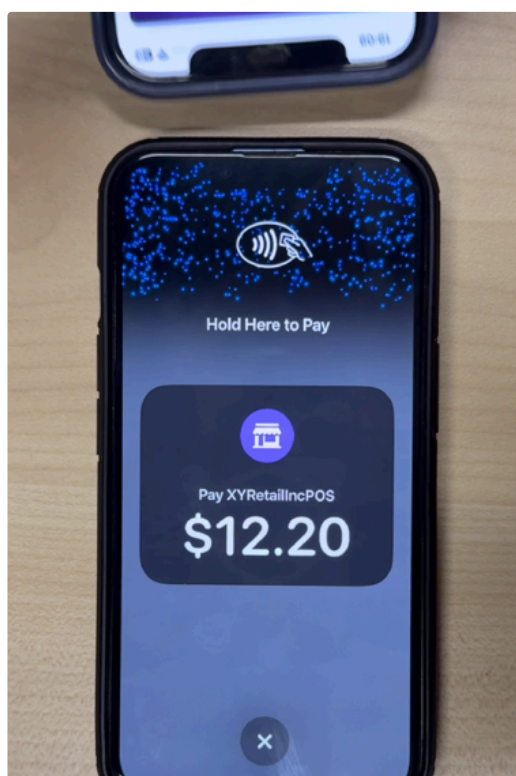
Note: If a split payment is required, refer to [Split Payment Using Tap to Pay on iPhone](#) for detailed steps.

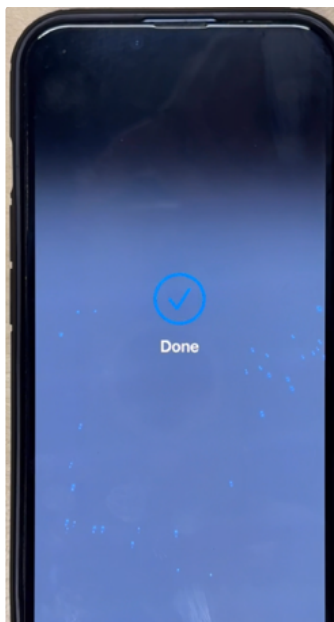
10. Tap the **Tap to Pay on iPhone** button to initiate the transaction.



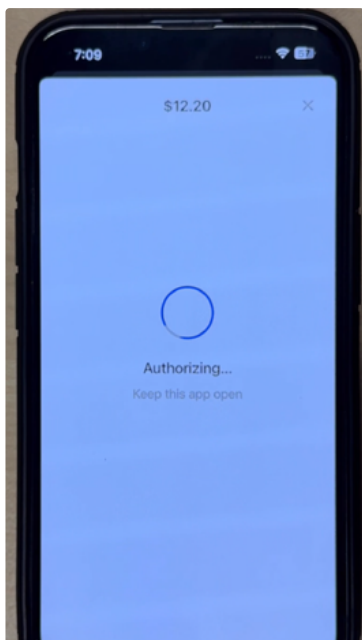


11. Hold the iPhone steady while the customer taps the payment method.

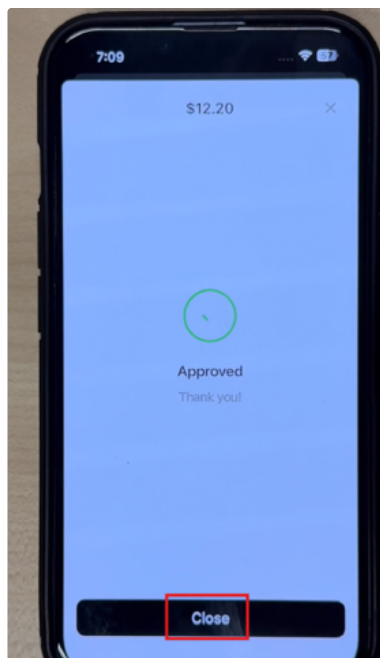




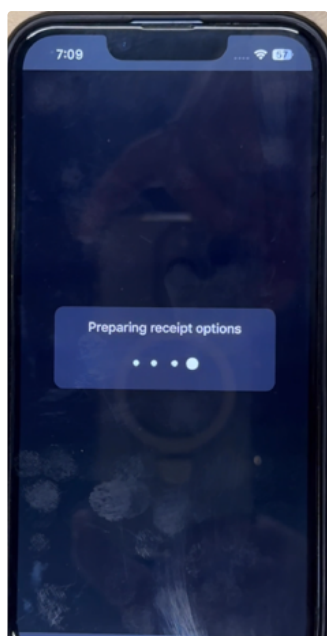
12. Allow the system to process the payment securely.

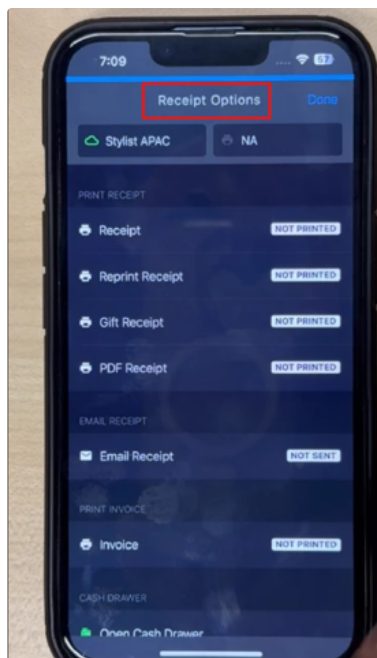


13. Confirm that an **Approved** status appears on the screen, then tap **Close**.

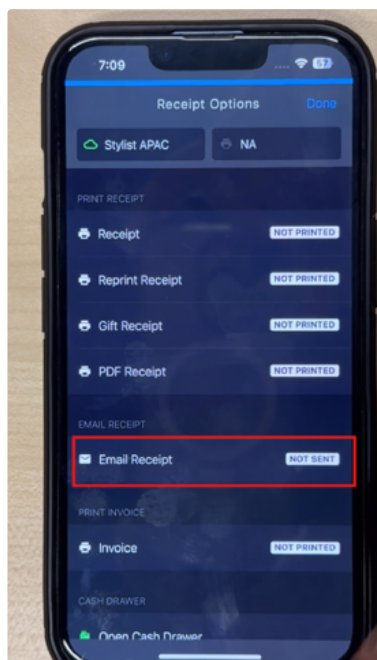


14. Wait for the screen to transition to the **Receipt Options** screen.

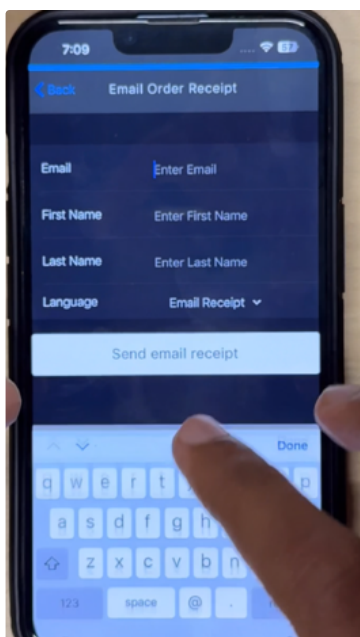




15. Tap **Email Receipt** and enter the following customer details:



- Enter the customer's **Email** address.
- Enter the **First Name** and **Last Name**, if required.
- Select the preferred **Language** for the receipt.
- Tap **Send email receipt** to deliver the receipt to the customer.



- i Select the receipt associated with the sale. Emailing the receipt is optional.

Split Payment Using Tap to Pay on iPhone

Introduction

The XY Stylist POS application supports split payments when using Tap to Pay on iPhone feature. This allows sales associates to collect a partial payment amount using Tap to Pay on iPhone and complete the remaining balance using an alternate payment method, such as cash or another supported tender. This option is useful when customers prefer to divide the total order amount across multiple payment methods.

Split Payment Flow

1. Select **Tap to Pay on iPhone** on the Payment Options screen.
2. When prompted, choose the **Split Payment** option.
3. Enter the amount to be charged using Tap to Pay on iPhone.
 - Example: For a total order amount of \$100, enter \$40 to be paid using Tap to Pay on iPhone.
4. Review and confirm the entered amount.
5. Continue with Tap to Pay on iPhone to collect the specified amount.
6. Complete the remaining balance using an alternate payment method, such as cash.
7. Finalize the transaction and proceed to receipt selection.

Inventory Count

Introduction

An **Inventory Count** verifies and records all physical stock available in a store or location. This process ensures that **system stock matches the actual stock on hand**, supporting accurate sales, replenishment, and reporting.

The count includes all items within the location:

- **Received Stock** – The system records items added to inventory
- **Reserved & Released** – The system returns items to available stock after reservation
- **Reserved & Sold** – The system marks items as sold while they remain physically present
- **In-Transit / Damaged** – The business owns items that are not available for sale

Inventory Count Methods

The counting method determines the exact quantity of stock available for sale at counting time and depends on how items are tracked in the system.

Criteria	Serialized Count (Individual Tracking)	Non-Serialized Count (Bulk Tracking)
Definition	The system tracks each item individually using a unique identity.	The system tracks items in bulk using a shared identifier.
Identifier	The system uses a Serial Number or IMEI.	The system uses a SKU or barcode.
Primary Focus	The process identifies a specific item.	The process counts the total available quantity.
System Behavior	The system records each item as a unique unit.	The system records items as a quantity group.
User Workflow	The user scans each item's unique identifier.	The user scans one item and enters the total quantity.

Validation	The user verifies each serial number to physical stock.	The user verifies the total quantity to the physical stock.
Best Use Case	The user uses this method for high-value or regulated items.	The user uses this method for high-volume, low-cost items.
Examples	Examples include phones, laptops, watches, and jewelry.	Examples include apparel, accessories, and general merchandise.

-
- [Non Serialized Inventory Count Using Full Count](#)
 - [Non Serialized Inventory Count Using Cycle Count](#)
 - [Serialized Count](#)
 - [Inventory Count Import File Template](#)

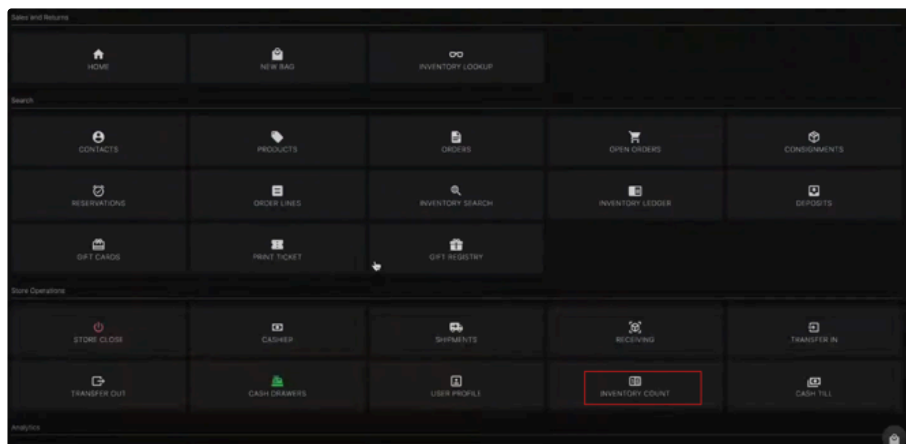
Non Serialized Inventory Count Using Full Count

Introduction

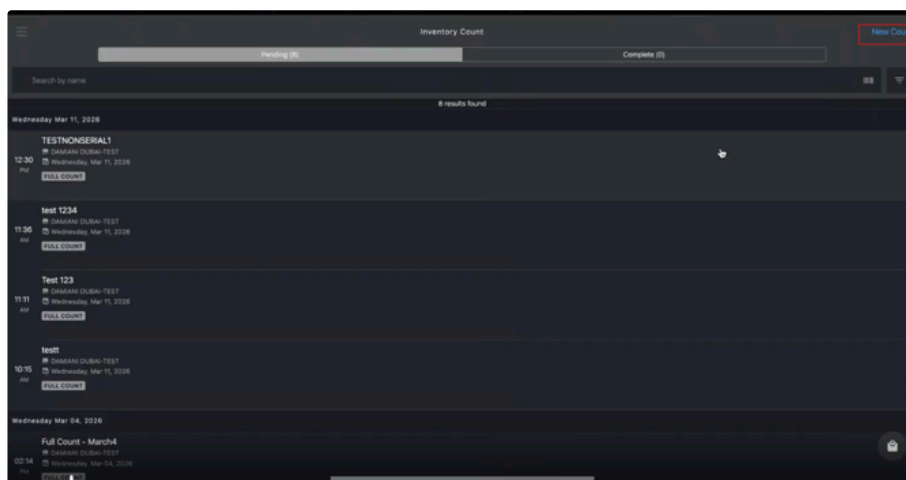
This topic describes how to perform a Full Count for non-serialized inventory. You use this method to count all items in the store without applying filters, ensuring that physical stock matches system records and maintains accurate quantities for sales and reporting.

Steps for Performing a Non Serialized Full Count

1. Click the burger menu.
2. Click the **Inventory Count**.



3. Click **New Count**.



4. Enter the details to create the new count:

- a. Verify the **Store Name** and **Effective Date** (auto-populated by the system).
 - b. Enter the **Count Name**, for example, DEMO123.
 - c. Select **Full Count** from the **Count Type** dropdown:
 - **Cycle Count:** Enter one of the following values:
 - **Department**
 - **Category**
 - **Sub-category**
 - **Vendor**
 - **Product Class**
 - **Collection**
 - **Full Count:** Allows for scanning any item in the store without classification by department or category.
5. Click **Create** to initialize the count session.
 6. Click the **Non Serialized Count** tab.

SKU	Item Name	SKU Code	Image	Status	Unit Cost	Quantity	Reserved Quantity
20082871	SAMPLE SILVER RINGS (28pc)	20082871		CREATED	AED0	0	1
20084024	SILVER BRACELET WHITE CZ cm.17.50	20084024		CREATED	AED0	0	10
20084058	BRONZE NECKLACE - HEARTS cm.55	20084058		CREATED	AED0	0	10
20084070	BRACELET BLUE HEMATITE BLACK CZ cm.22	20084070		CREATED	AED0	0	10
31023522	DAMIANI PERFUME NEW 2016 HOMME 100ml	31023522		CREATED	AED0	0	3

7. Review the list of **Non Serialized Count** listed items that are automatically populated for the store.

UPC	Item Name	Item Code	Image	Status	Unit Cost	Counted	Expected Count
20083871	SAMPLE SILVER RINGS (28pz)	20083871		CREATED	AEDO	0	1
20084024	SILVER BRACELET WHITE CZ cm.17.50	20084024		CREATED	AEDO	0	10
20084058	BRONZE NECKLACE - HEARTS cm.50	20084058		CREATED	AEDO	0	10
20084070	BRACELET BLUE HEMATITE BLACK CZ cm.22	20084070		CREATED	AEDO	0	10
31503522	DAMIANI PERFUME NEW 2016 HOMME 100ml	31503522		CREATED	AEDO	0	3

8. You can Modify the list as needed:

a. To Remove a Existing Items

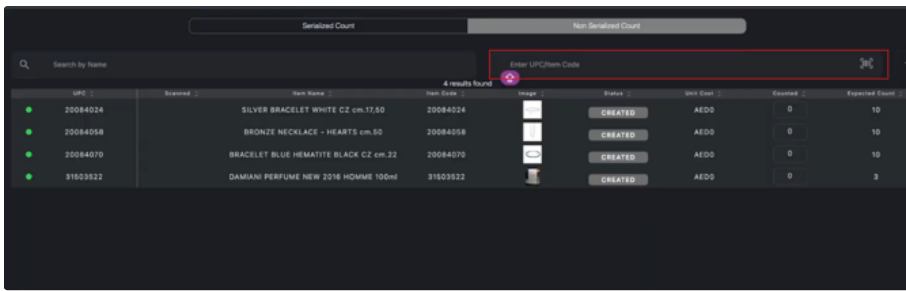
i. Click the kebab menu of the specific item to remove items not part of the current inventory count.

UPC	Item Name	Item Code	Image	Status	Unit Cost	Counted	Expected Count
20083871	SAMPLE SILVER RINGS (28pz)	20083871		CREATED	AEDO	0	1
20084024	SILVER BRACELET WHITE CZ cm.17.50	20084024		CREATED	AEDO	0	10
20084058	BRONZE NECKLACE - HEARTS cm.50	20084058		CREATED	AEDO	0	10
20084070	BRACELET BLUE HEMATITE BLACK CZ cm.22	20084070		CREATED	AEDO	0	10
31503522	DAMIANI PERFUME NEW 2016 HOMME 100ml	31503522		CREATED	AEDO	0	3

ii. Click **Remove** to remove the item from list.

UPC	Item Name	Item Code	Image	Status	Unit Cost	Counted	Expected Count
20083871	SAMPLE SILVER RINGS (28pz)	20083871		CREATED	AEDO	0	1
20084024	SILVER BRACELET WHITE CZ cm.17.50	20084024		CREATED	AEDO	0	10
20084058	BRONZE NECKLACE - HEARTS cm.50	20084058		CREATED	AEDO	0	10
20084070	BRACELET BLUE HEMATITE BLACK CZ cm.22	20084070		CREATED	AEDO	0	10
31503522	DAMIANI PERFUME NEW 2016 HOMME 100ml	31503522		CREATED	AEDO	0	3

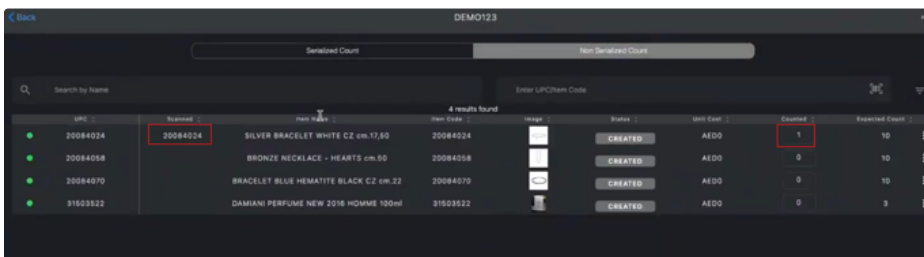
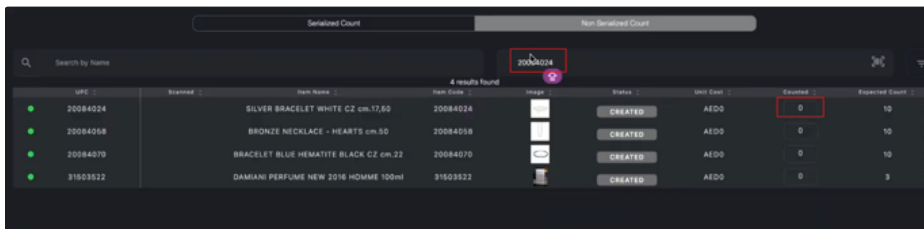
b. Enter or scan the UPC or item code in the **Enter UPC/Item Code** field to add a new item to the list.



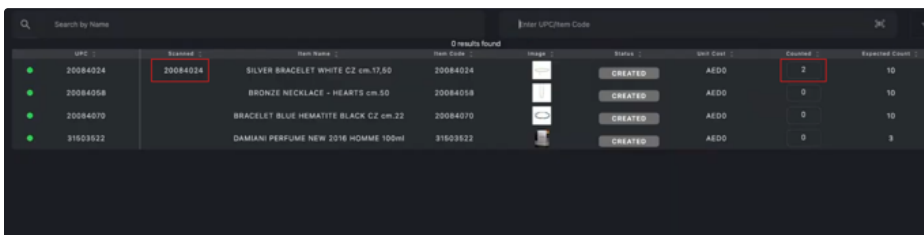
9. Update the **Counted** quantity for each item using one of the following methods:

a. Enter or scan the UPC/item code in the **Enter UPC/Item Code** field.

- The following images show an example of entering **20084024** and updating the **Counted** field quantity from **0 to 1**.



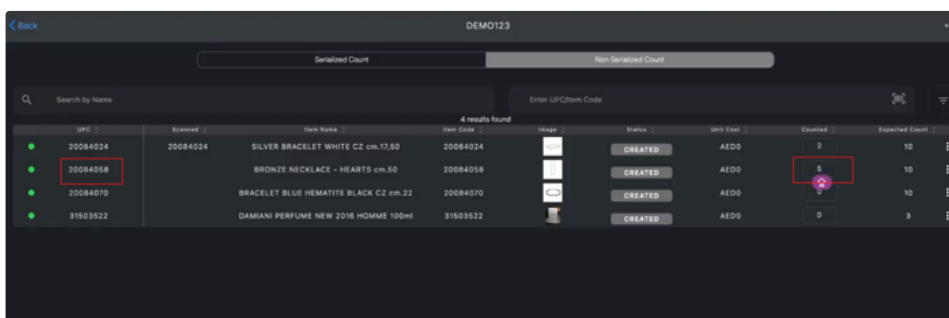
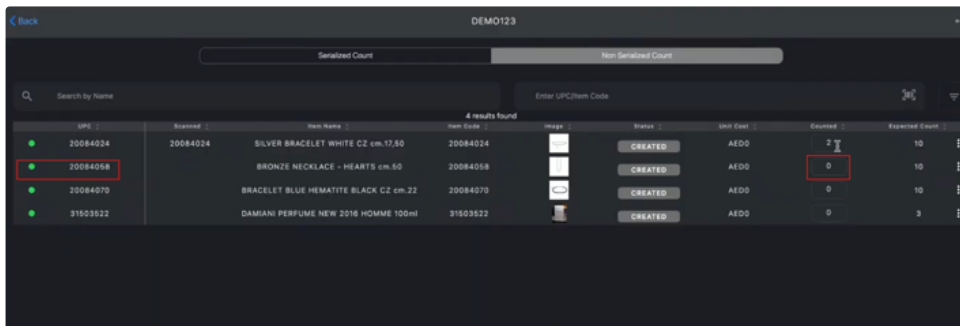
- If needed, repeat entering or scanning the same UPC/item code. The following image shows an example of the system incrementing the **Counted** field quantity from **1 to 2**.



- If needed, continue entering or scanning the UPC/item code. **Example:** The system increases the counted quantity with each entry or scan.

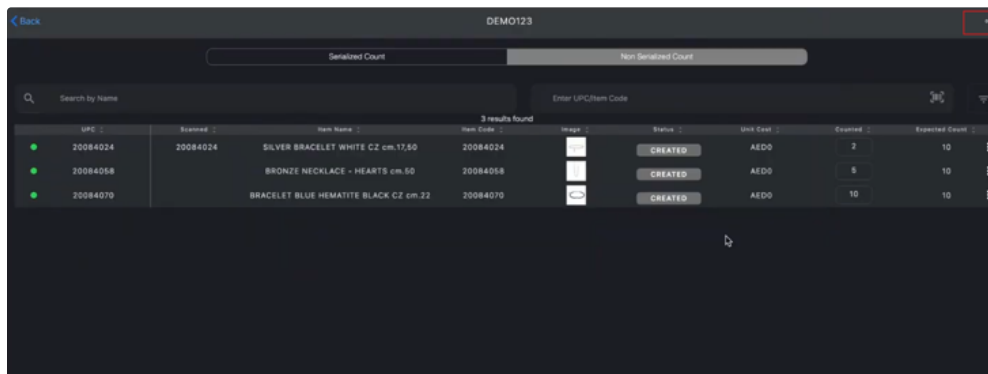
b. Manually updating the specific quantity in the **Counted** field.

The following images show an example of how to manually update the **Counted** quantity for UPC/item code **20084058** from **0** to **5**.

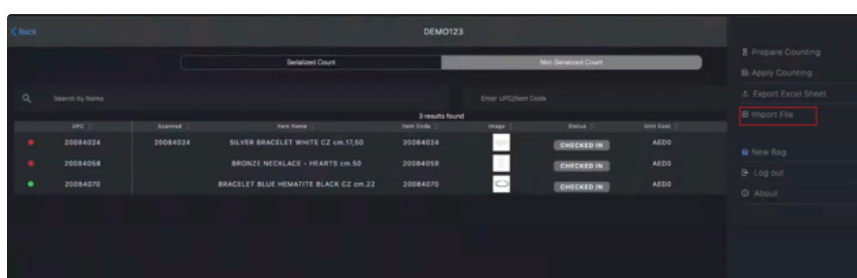


c. [Importing a file](#)

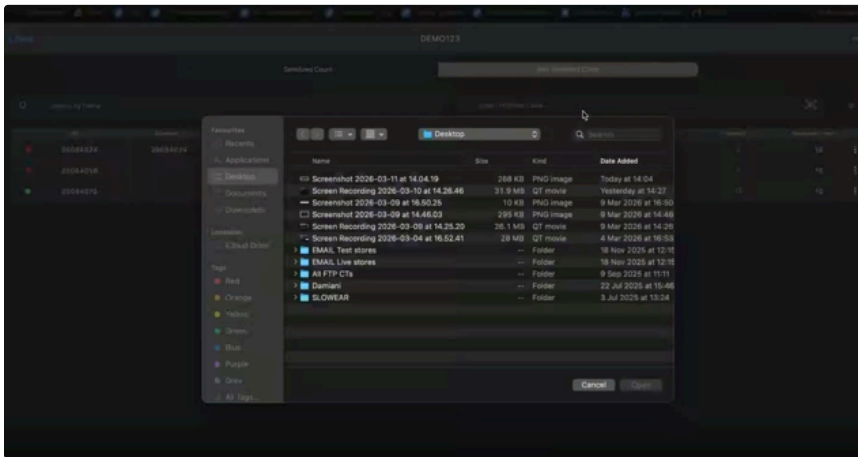
i. Click the meatballs menu in the upper-right corner.



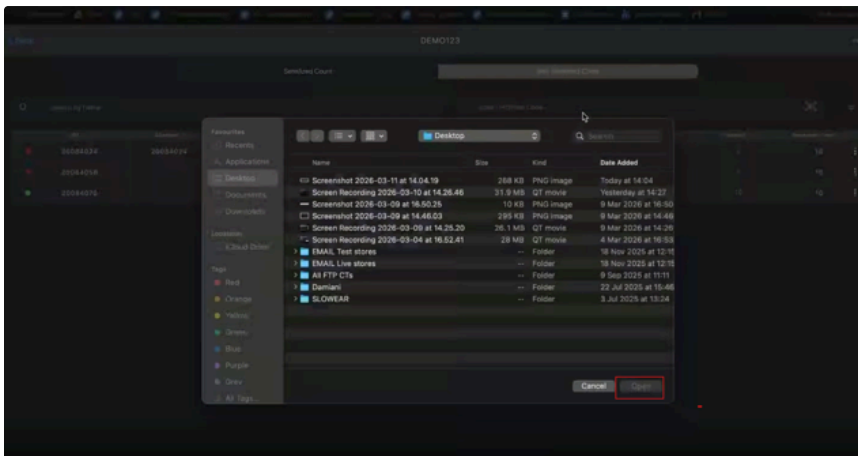
ii. Click the **Import File**.



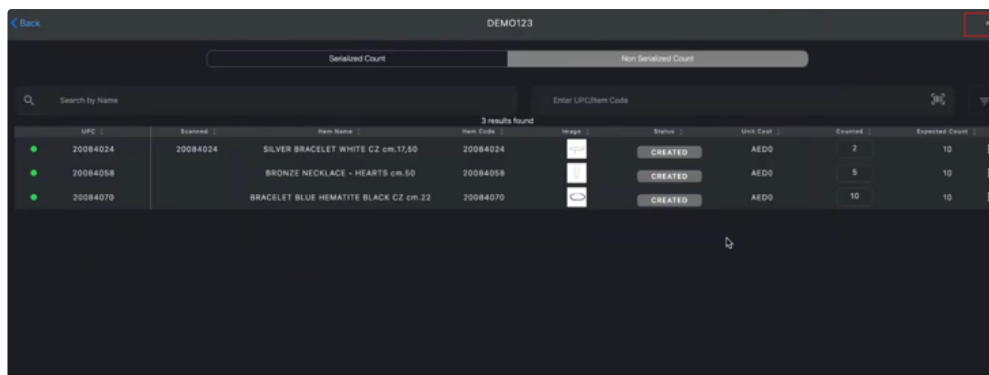
iii. Select the New Count Excel File from your system.



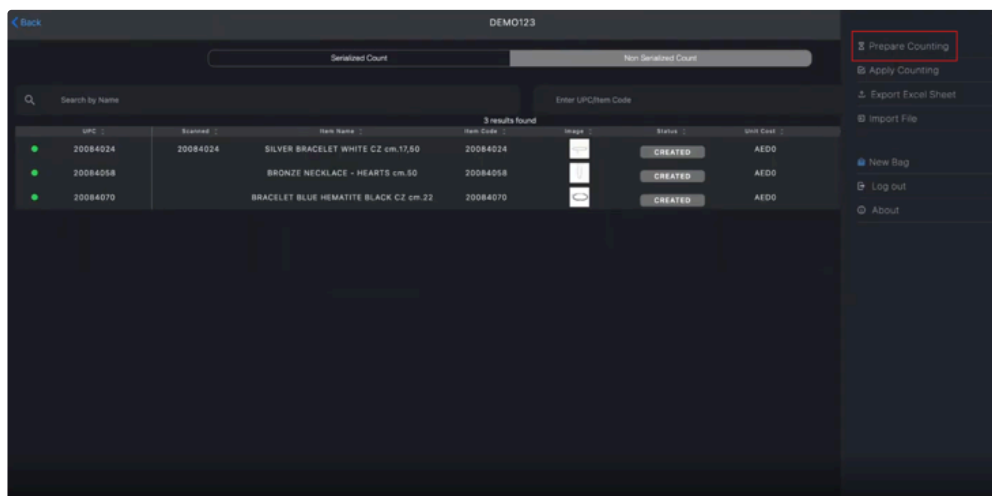
iv. Click **Open** to Upload the file.



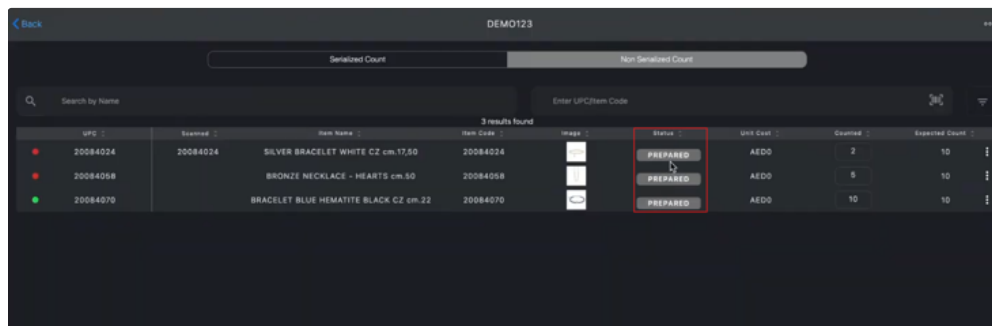
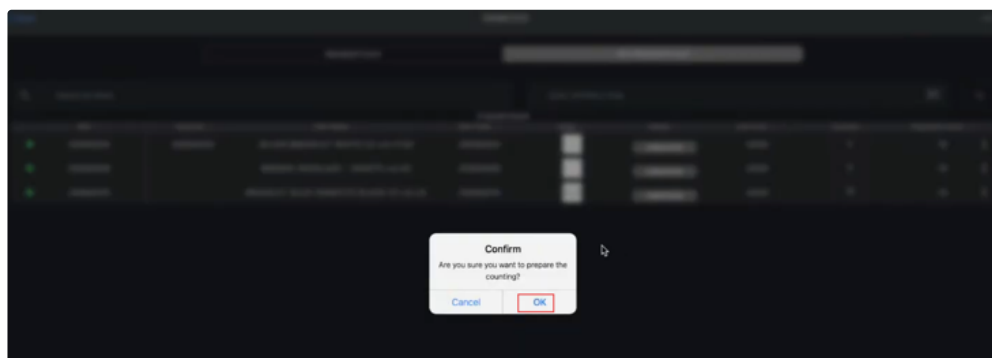
10. Click the meatballs menu in the upper-right corner.



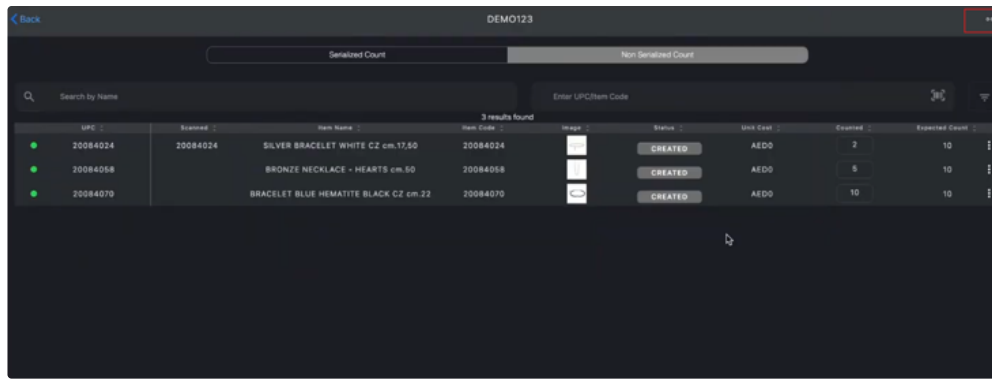
11. Click the **Prepare Counting**.



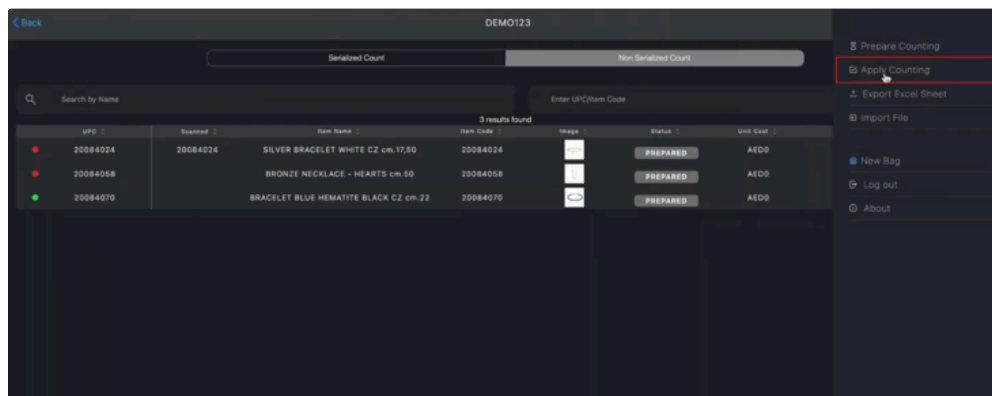
12. Click **OK** in the **Confirm** pop-up to update the session status from **CREATED** to **PREPARED**.



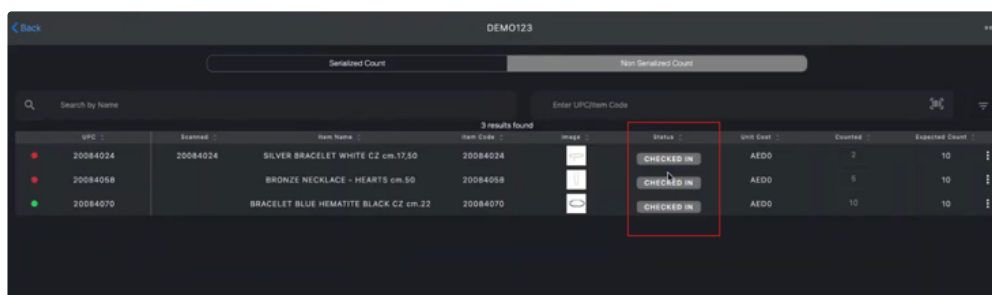
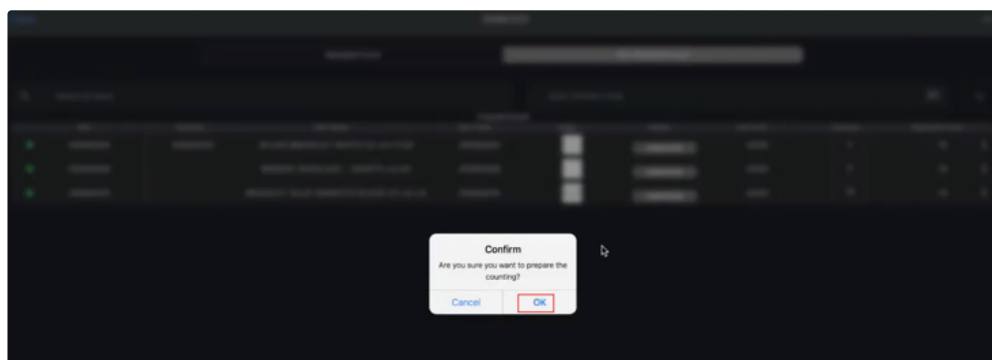
13. Click the meatballs menu in the upper-right corner again.



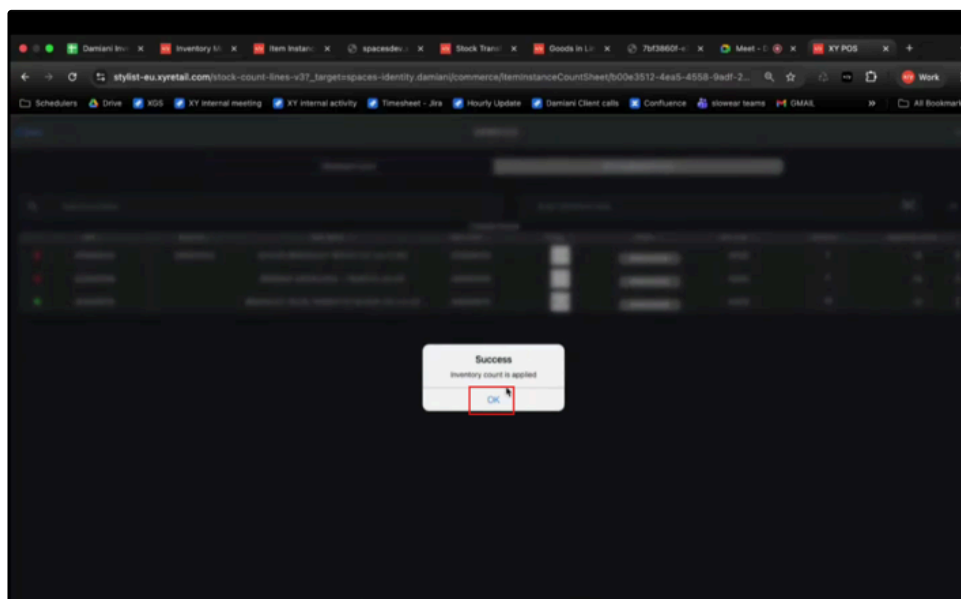
14. Click the **Apply Counting**.



15. Click **OK** in the **Confirm** pop-up to update the inventory count status from **PREPARED** to **CHECKED-IN**.



16. Click **OK** in the **Success** pop-up.



17. Sign in to [Inventory Manager](#) sheet.

18. Paste the UPC or item code in the search box.

LOCATION	ITEM CODE	COVER MEDIA	UPC	ON HAND	AVAILABLE	RESERVED	COMBINED	TRANSIT	MSP	PRICE	AVG COST	FACTORY COST	ON I
DAMIANI DUBAI-TEST	20084070		20084070	14	10	0	4		0	\$0.00	\$0.00		
DAMIANI DUBAI-TEST	20084024		20084024	3	2	1	0		0	\$0.00	\$0.00		
DAMIANI DUBAI-TEST	20084058		20084058	8	5	3	0		0	\$0.00	\$0.00		

19. Verify the **AVAILABLE** column count is updated.

Inventory Manager
Last Viewed: March 10th 2026 at 11:37 pm by admin 190

DAMIANI DUBAI-TEST Instance Tracked

LOCATION	ITEM CODE	COVER MEDIA	UPC	ON HAND	AVAILABLE	RESERVED	COMBINED	TRANSIT	T.L.	MSP	PRICE	AVG COST	FACTORY COST	ON I
DAMIANI DUBAI-TEST	20084070		20084070	14	10	0	4			0	\$0.00	\$0.00		
DAMIANI DUBAI-TEST	20084024		20084024	3	2	1	0			0	\$0.00	\$0.00		
DAMIANI DUBAI-TEST	20084058		20084058	8	5	3	0			0	\$0.00	\$0.00		

20. Click the meatballs menu in the upper-right corner again.

DEMO123

Serialized Count Non Serialized Count

Search by Name Enter UPC/Item Code

3 results found

UPC	Scanned	Item Name	Item Code	Image	Status	Unit Cost	Counted	Expected Count
20084024	20084024	SILVER BRACELET WHITE CZ cm.17.50	20084024		CHECKED IN	AED0	7	10
20084058		BRONZE NECKLACE - HEARTS cm.50	20084058		CHECKED IN	AED0	5	10
20084070		BRACELET BLUE HEMATITE BLACK CZ cm.22	20084070		CHECKED IN	AED0	10	10

Prepare Counting
Apply Counting
Export Excel Sheet
Import File
New Bag
Log out
About

21. Click the **Export Excel Sheet** to download the report in Excel or CSV.

DEMO123

Serialized Count Non Serialized Count

Search by Name Enter UPC/Item Code

3 results found

UPC	Scanned	Item Name	Item Code	Image	Status	Unit Cost	Counted	Expected Count
20084024	20084024	SILVER BRACELET WHITE CZ cm.17.50	20084024		CHECKED IN	AED0	7	10
20084058		BRONZE NECKLACE - HEARTS cm.50	20084058		CHECKED IN	AED0	5	10
20084070		BRACELET BLUE HEMATITE BLACK CZ cm.22	20084070		CHECKED IN	AED0	10	10

Prepare Counting
Apply Counting
Export Excel Sheet
Import File
New Bag
Log out
About

i When you apply the inventory count, the system updates the stock and sets the status to **Checked-In**, allows view-only access, and prevents further modifications.

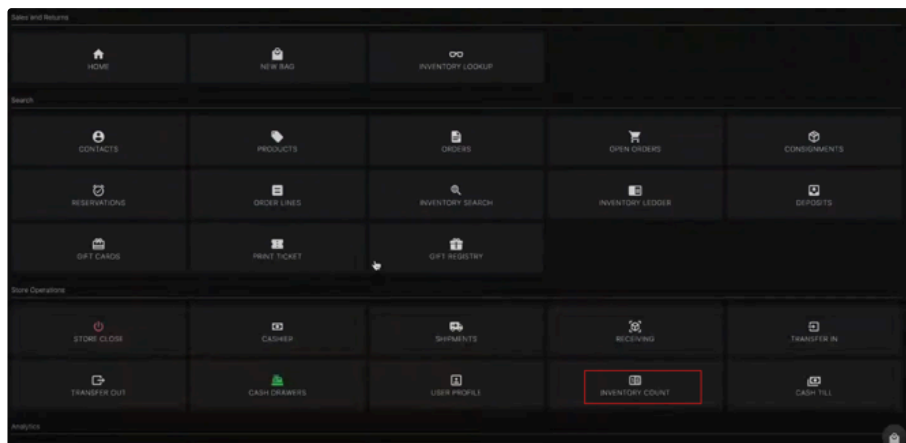
Non Serialized Inventory Count Using Cycle Count

Introduction

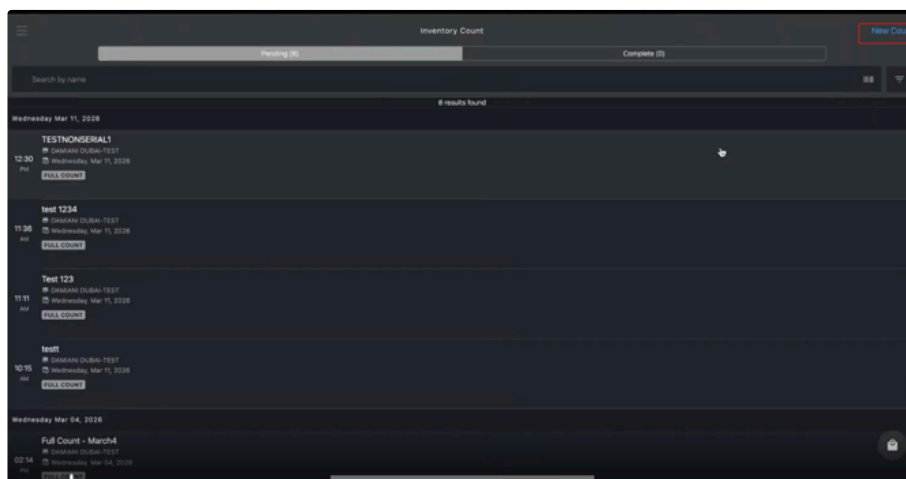
This topic describes how to perform a **non-serialized inventory count using Cycle Count**. You use this method to filter and count items by specific attributes, such as **Department, Category, Subcategory, Vendor, Product Class, or Collection**, instead of counting the entire store inventory at once.

Steps for Performing a Non Serialized Cycle Count

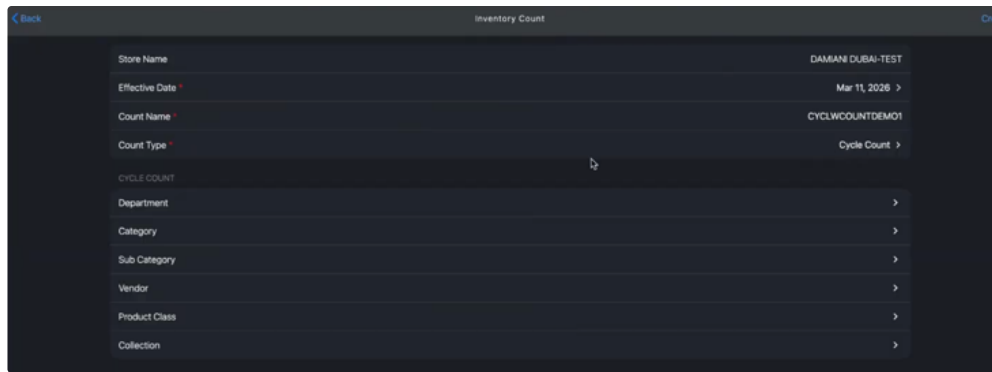
1. Click the burger menu.
2. Click the **Inventory Count**.



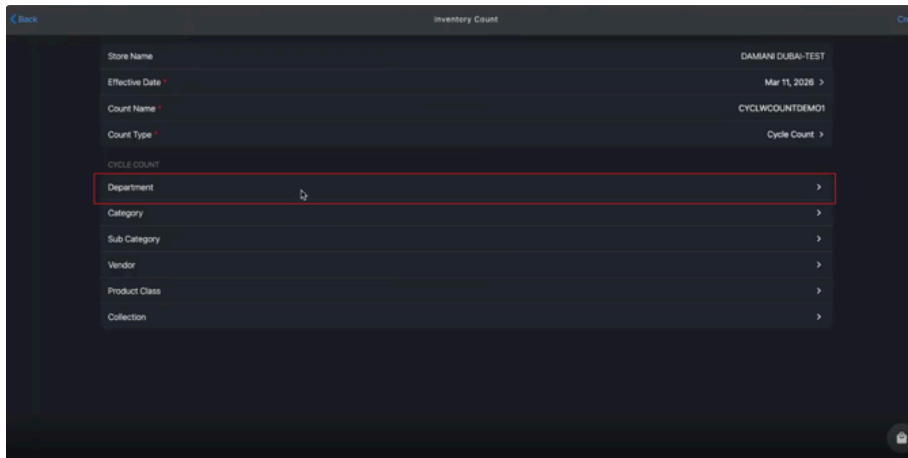
3. Click **New Count**.



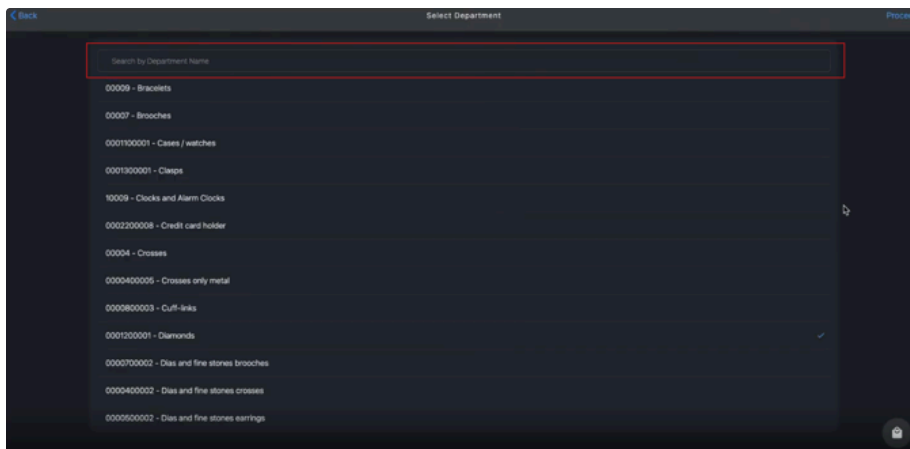
4. Enter the details to create the new count:



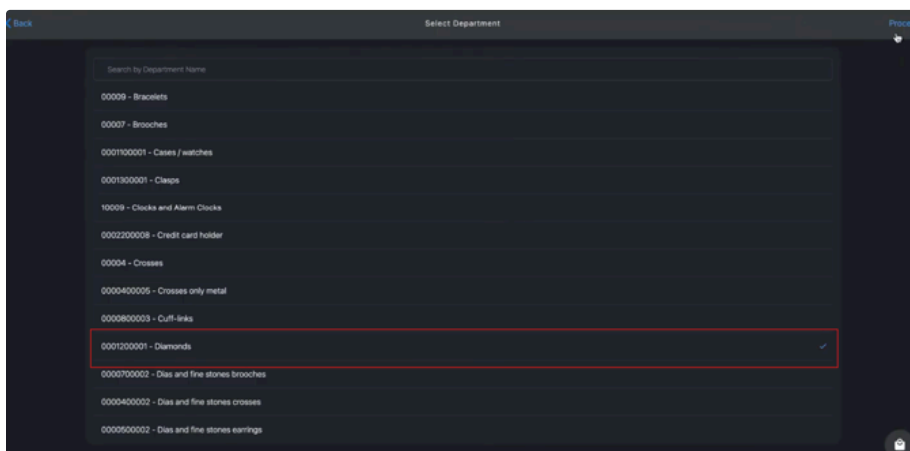
- a. Verify the **Store Name** and **Effective Date** (auto-populated by the system).
- b. Enter the **Count Name**, for example, CYCLWCOUNTDEMO1.
- c. Select **Cycle Count** from the **Count Type** dropdown:
 - **Cycle Count:** Enter one of the following values:
 - **Department**
 - **Category**
 - **Sub-category**
 - **Vendor**
 - **Product Class**
 - **Collection**
 - **Full Count:** Allows for scanning any item in the store without classification by department or category.
- d. Click the **Department** dropdown.



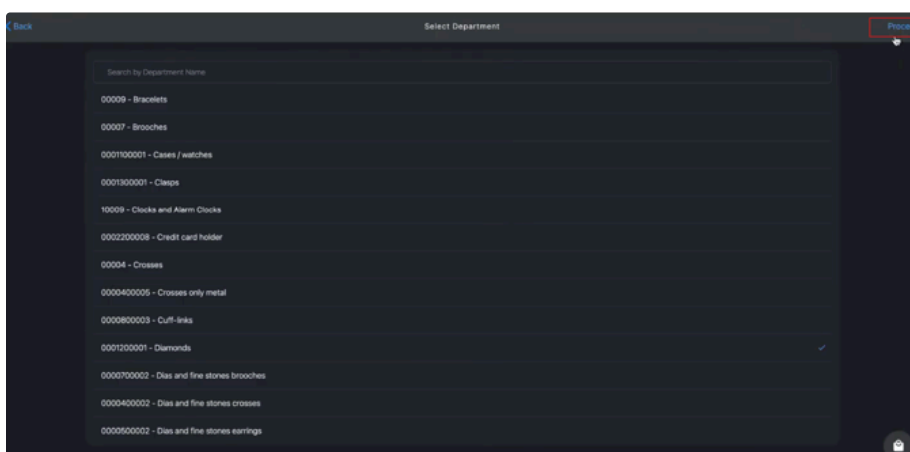
- Enter the department name in the search box.



- Select the department name from the list.



- Click **Proceed** to Navigate back to **Inventory Count** page.

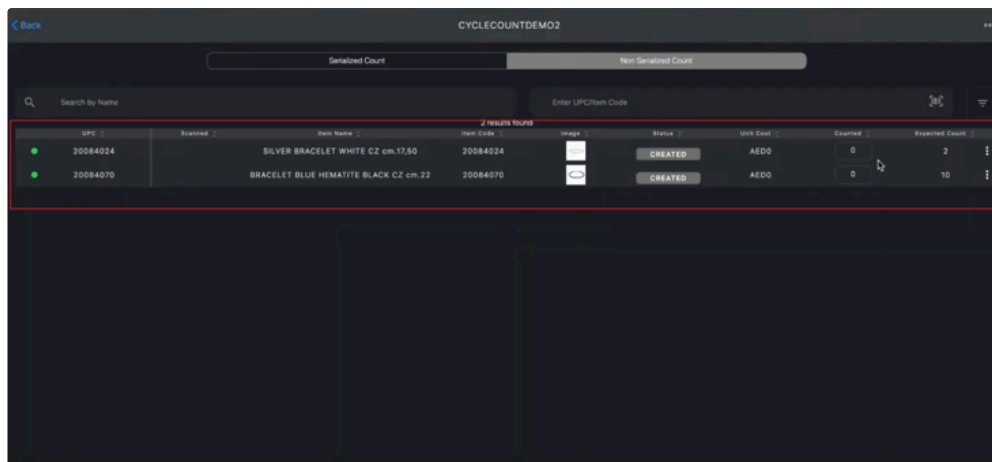


5. Click **Create** to initialize the count session.

6. Click the **Non Serialized Count** tab.

UPC	Item Name	Item Code	Image	Status	Unit Cost	Counted	Expected Count
20084024	SILVER BRACELET WHITE C2 cm.17.50	20084024		CREATED	AED0	0	2
20084070	BRACELET BLUE HEMATITE BLACK C2 cm.22	20084070		CREATED	AED0	0	10

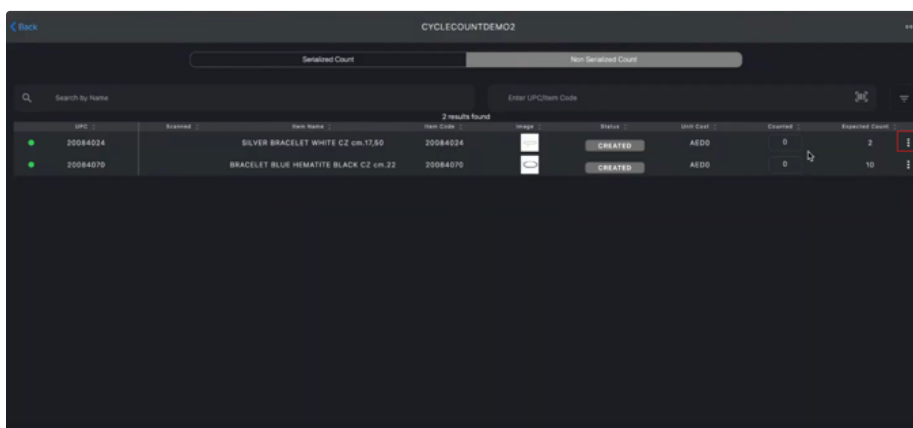
7. Review the list of **Non Serialized Count** listed items that are automatically populated for the store.



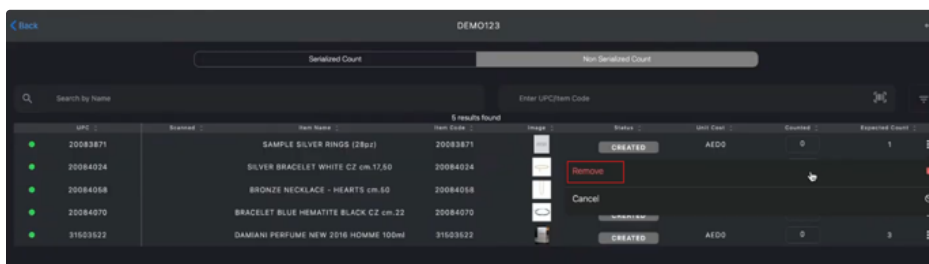
8. You can Modify the list as needed:

a. To Remove a Existing Items

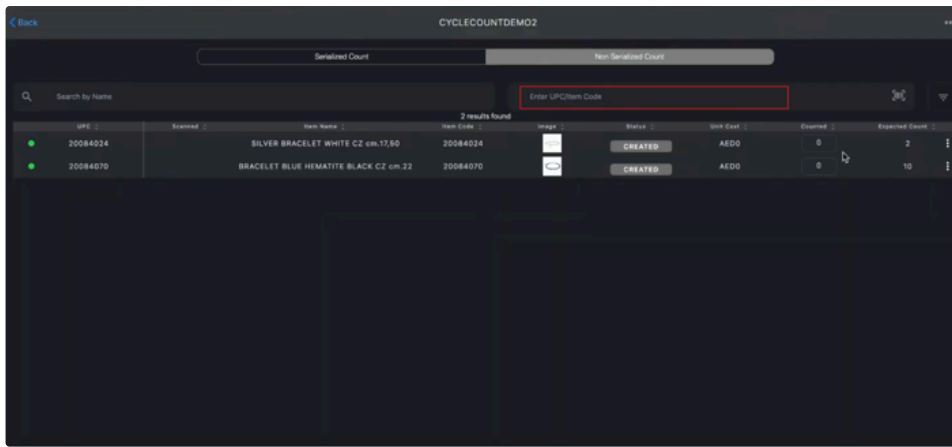
i. Click the kebab menu of the specific item to remove items not part of the current inventory count.



ii. Click **Remove** to remove the item from list.



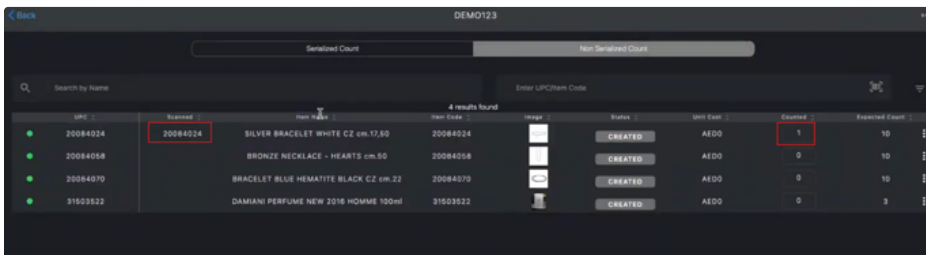
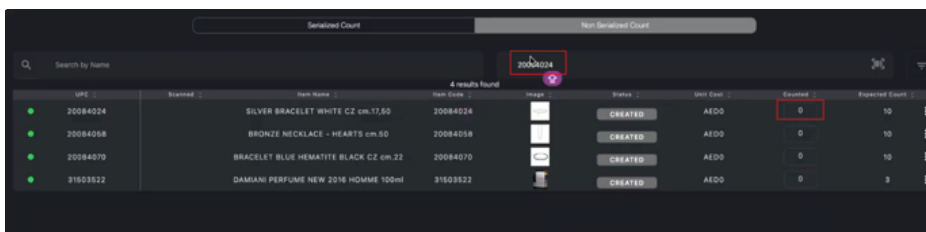
b. Enter or scan the UPC or item code in the **Enter UPC/Item Code** field to add a new item to the list.



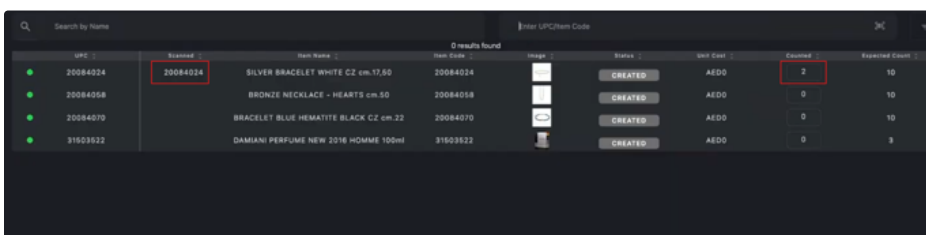
9. Update the **Counted** quantity for each item using one of the following methods:

a. Enter or scan the UPC/item code in the **Enter UPC/Item Code** field.

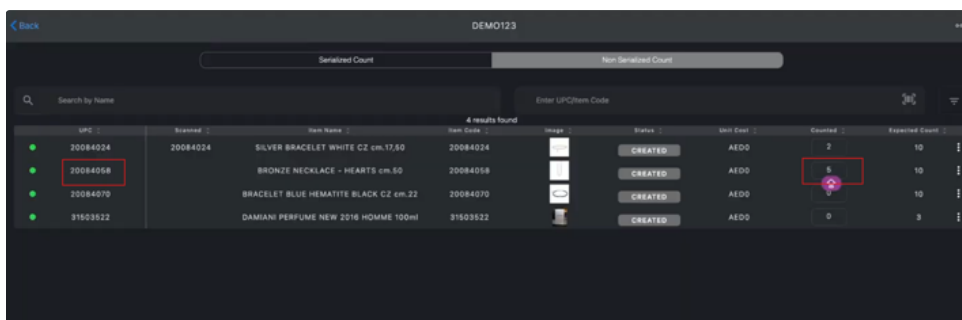
- The following images show an example of entering **20084024** and updating the **Counted** field quantity from **0 to 1**.



- If needed, repeat entering or scanning the same UPC/item code. The following image shows an example of the system incrementing the **Counted** field quantity from **1 to 2**.

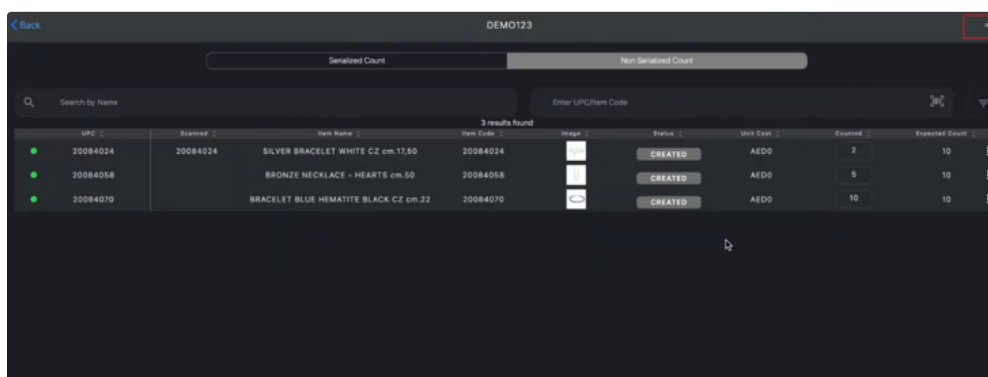


- If needed, continue entering or scanning the UPC/item code. **Example:** The system increases the counted quantity with each entry or scan.
- b. Manually updating the specific quantity in the **Counted** field.
- The following images show an example of how to manually update the **Counted** quantity for UPC/item code **20084058** from **0** to **5**.

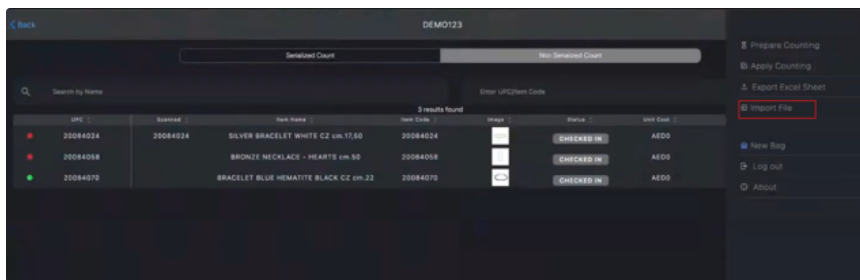


c. [Importing a file](#)

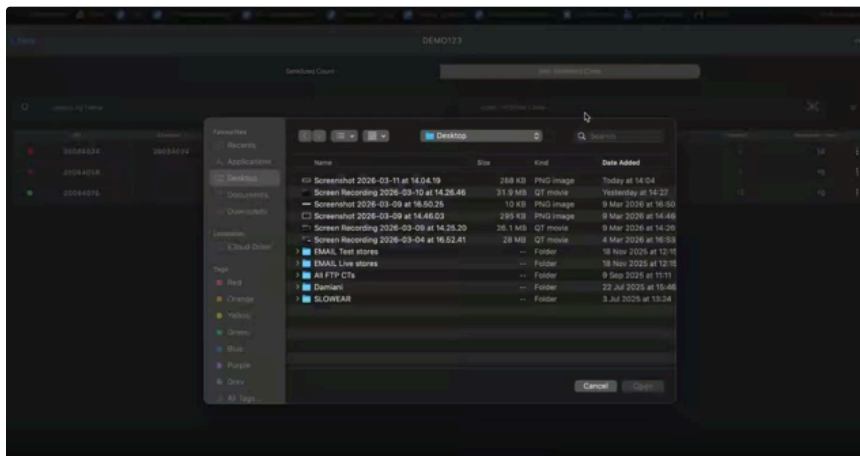
- i. Click the meatballs menu in the upper-right corner.



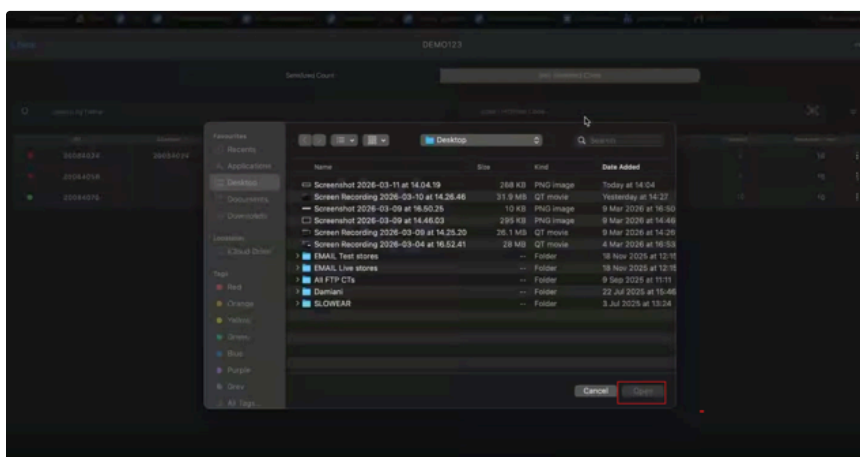
- ii. Click the **Import File**.



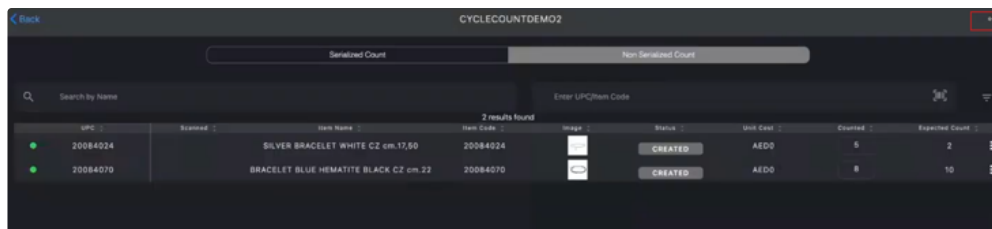
iii. Select the New Count Excel File from your system.



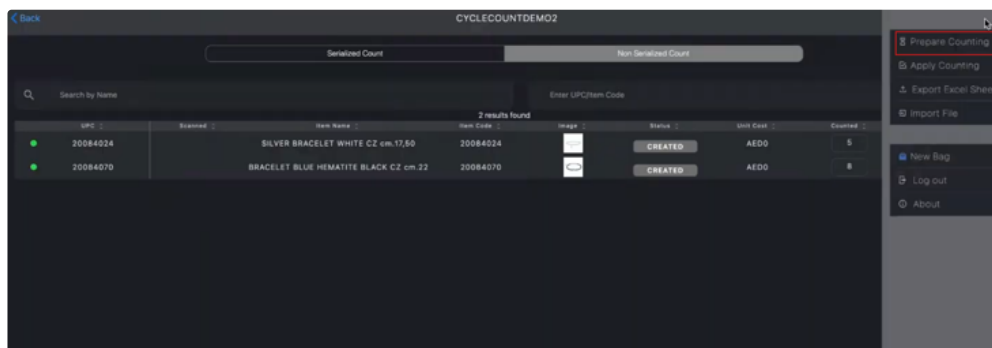
iv. Click **Open** to Upload the file.



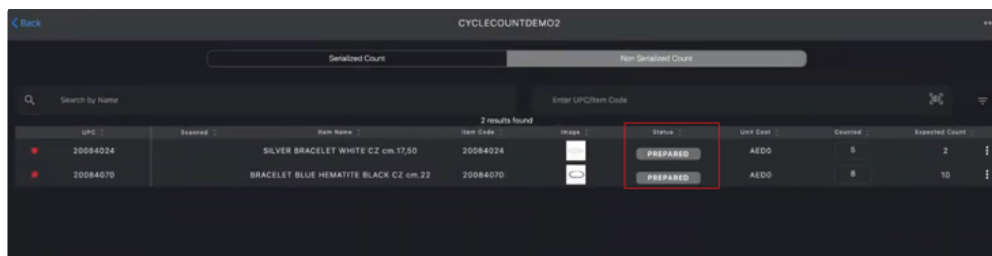
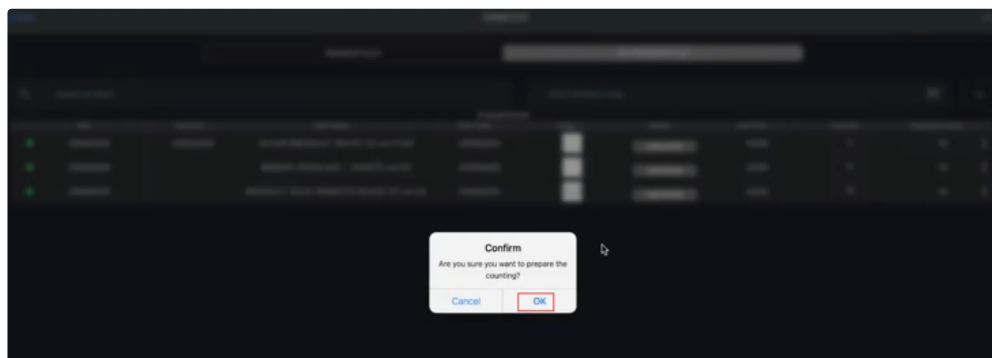
10. Click the meatballs menu in the upper-right corner.



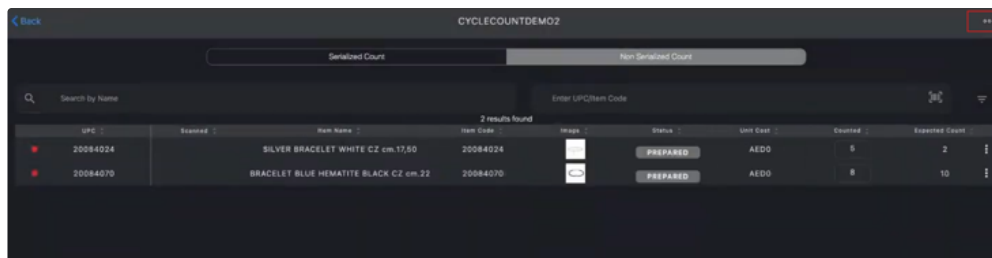
11. Click the **Prepare Counting**.



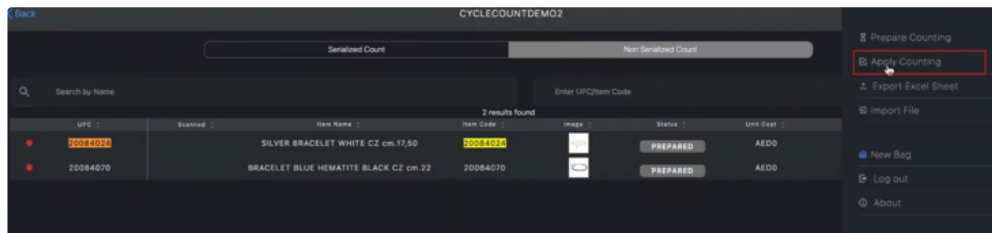
12. Click **OK** in the **Confirm** pop-up to update the session status from **CREATED** to **PREPARED**.



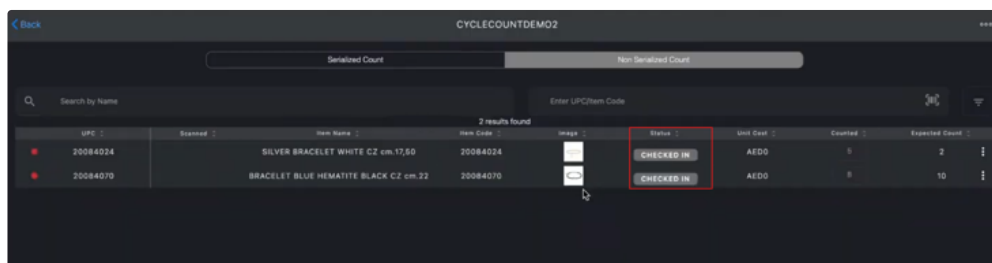
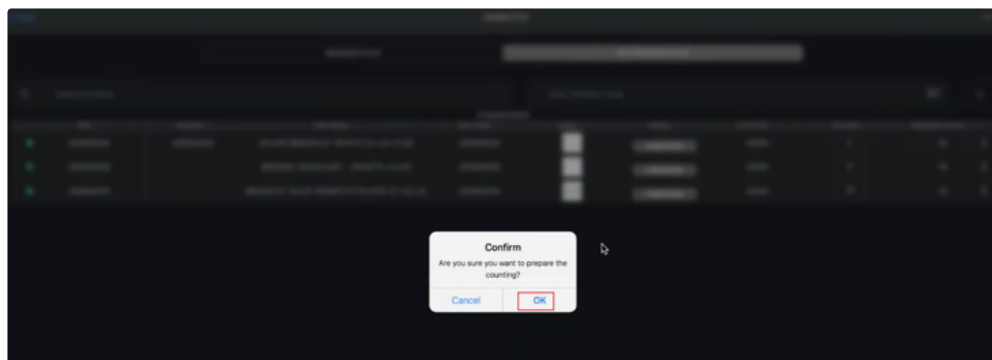
13. Click the meatballs menu in the upper-right corner again.



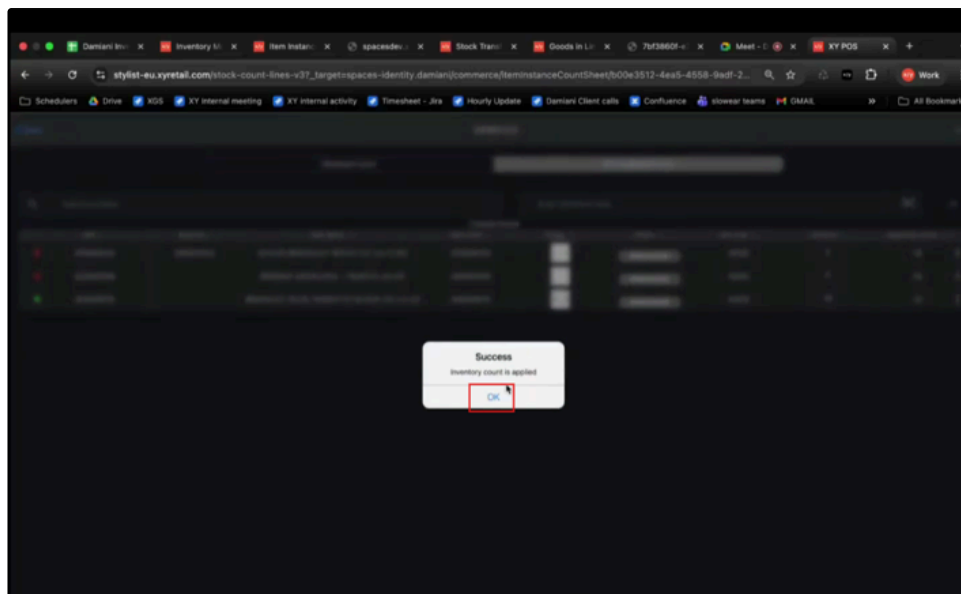
14. Click the **Apply Counting**.



15. Click **OK** in the **Confirm** pop-up to update the inventory count status from **PREPARED** to **CHECKED-IN**.

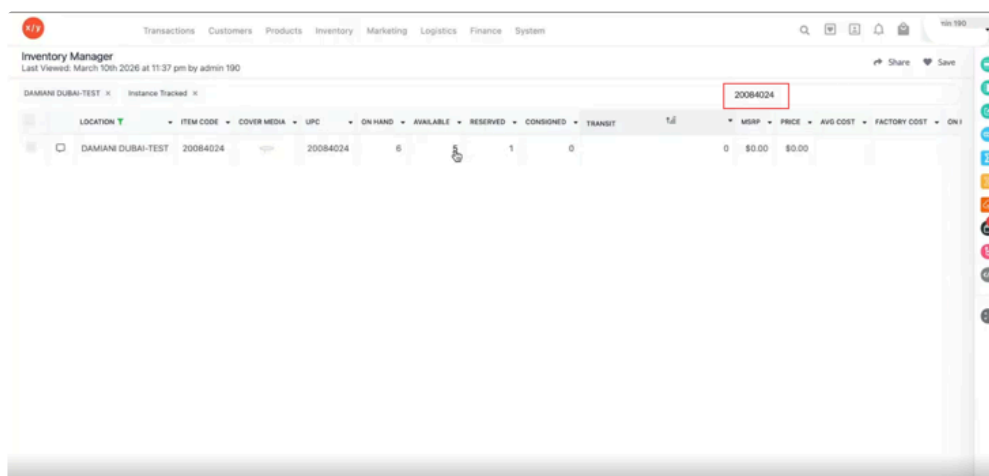


16. Click **OK** in the **Success** pop-up to save the count.

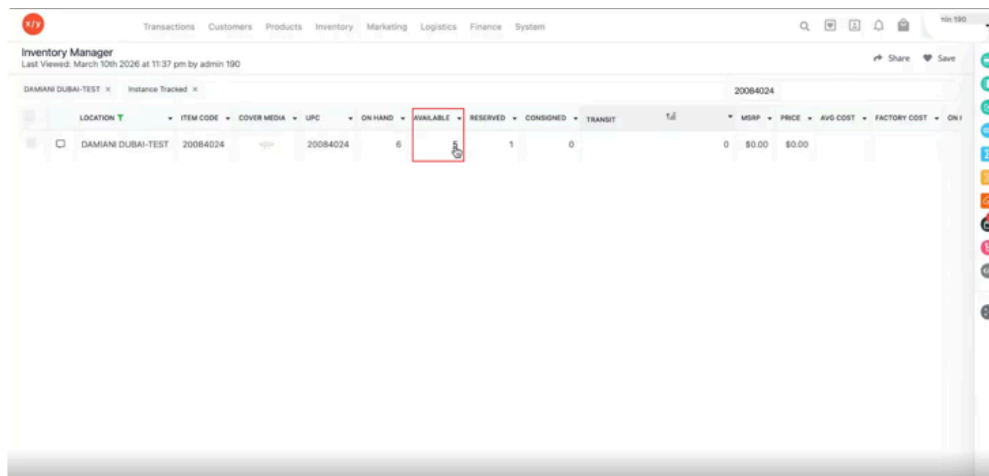


17. Sign in to [Inventory Manager](#) sheet.

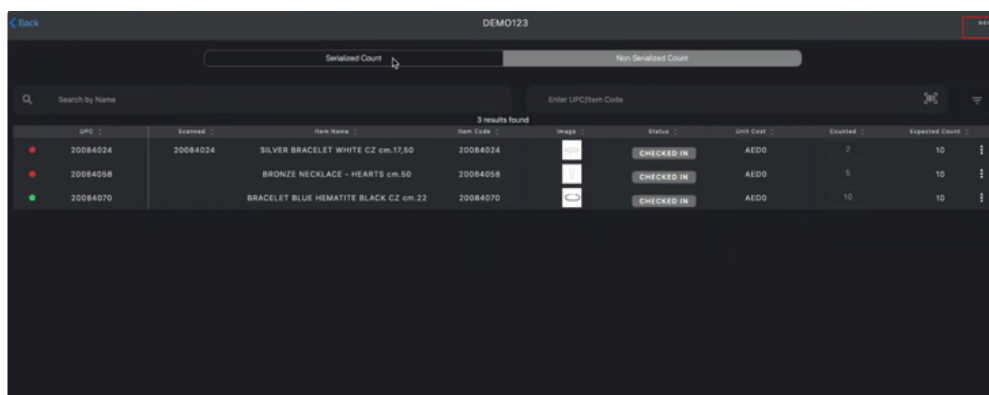
18. Paste the UPC or item code in the search box.



19. Verify the **AVAILABLE** column count is updated.



20. Click the meatballs menu in the upper-right corner again.



21. Click the **Export Excel Sheet** to download the report in Excel or CSV.



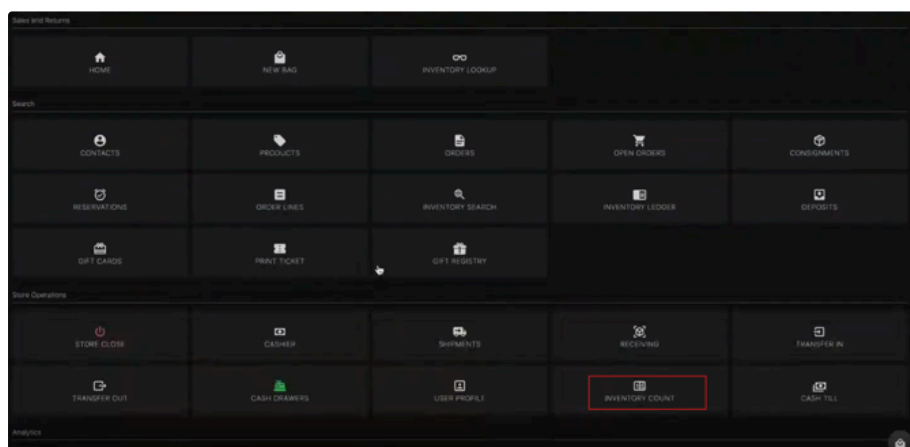
Serialized Count

Introduction

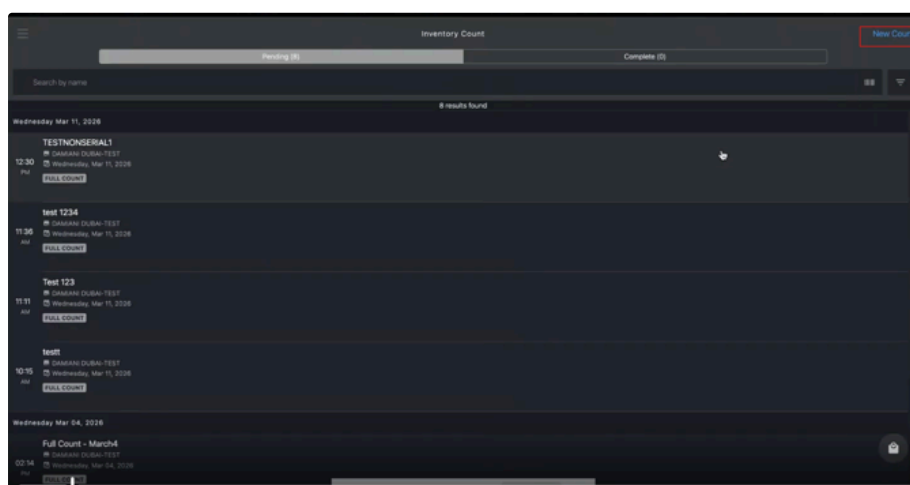
This topic describes how to perform an inventory count for **serialized items**. You use this method to verify each item individually using its unique identifier, ensuring that physical stock matches system records and maintains accurate inventory levels.

Steps for Performing a Serialized Count

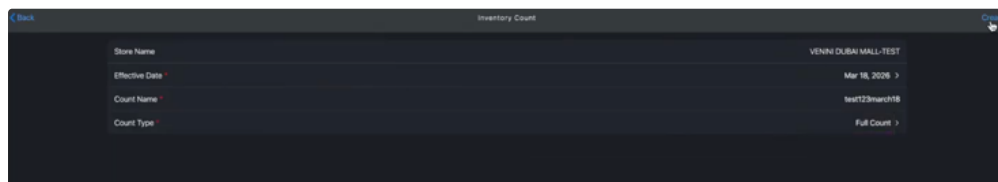
1. Click the burger menu.
2. Click the **Inventory Count**.



3. Click **New Count**.



4. Enter the details to create the new count:



The screenshot shows a dark-themed web form titled "Inventory Count". It has a "Back" button on the top left and a "Create" button on the top right. The form contains four rows of input fields:

Field Name	Value
Store Name	VENNI DUBAI MALL-TEST
Effective Date	Mar 18, 2026
Count Name	test123march18
Count Type	Full Count

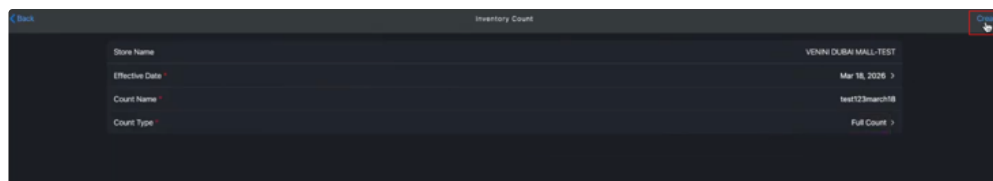
5. Verify the **Store Name** and **Effective Date** (auto-populated by the system).

6. Enter the **Count Name**, for example, test123march18.

7. Select one of the option from **Count Type** dropdown:

- **Cycle Count:** Enter one of the following values:
 - **Department**
 - **Category**
 - **Sub-category**
 - **Vendor**
 - **Product Class**
 - **Collection**
- **Full Count:** Allows scanning any item in the store without classifying by department or category. In this example, selected the **Full Count** option.

8. Click **Create** to initialize the count session.



This screenshot is identical to the one above, but with a red box highlighting the "Create" button in the top right corner of the form.

9. Click the **Serialized Count** tab.

test123mar018

Serialized Count Non-Serialized Count

Enter Tag Name

Activate Tag Enter Barcode

Enter the area you're counting from. Enter or scan barcode to add item to the count. Search by UPC and Serial Number

28 results found

Serial Number	UPC	Item Code	Image	Available	Received Count	Counted	Item Receive Status	Status	Unit Cost	Tag
T10021211	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021210	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021209	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T90021208	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021207	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021206	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T90021249	31506620	31506620		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T90021205	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021248	31506620	31506620		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T90021226	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T90021204	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021247	31506620	31506620		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T10021225	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T90021203	20044905	20044905		True	1	0	RECEIVED	NOT-COUNTED	AED10,380	NA
T10021224	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T10021222	20044905	20044905		True	1	0	RECEIVED	NOT-COUNTED	AED10,380	NA
T90021246	31506620	31506620		False	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA

10. Enter the tag name in the **Enter Tag Name** field to specify the counting area, for example, test 2.

test123mar018

Serialized Count Non-Serialized Count

test2

Activate Tag Enter Barcode

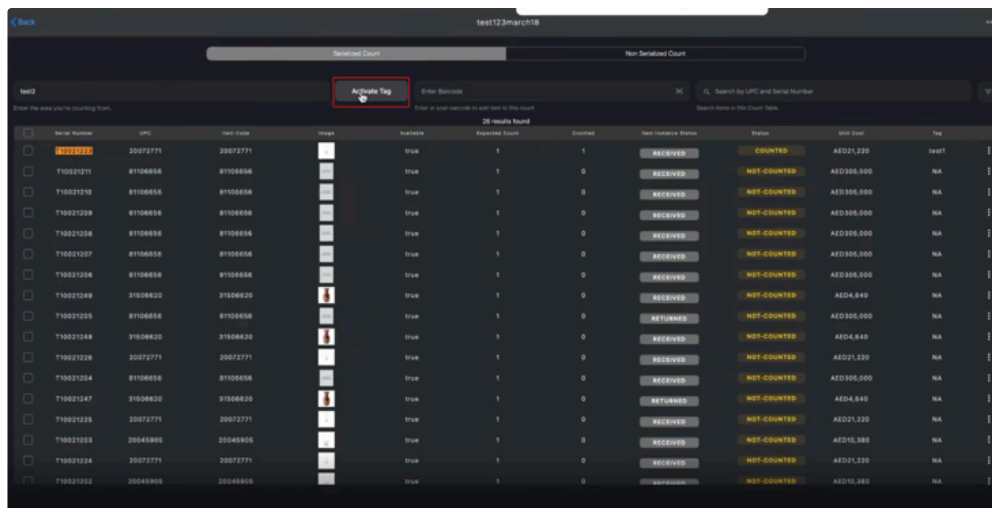
Enter the area you're counting from. Enter or scan barcode to add item to the count. Search by UPC and Serial Number

28 results found

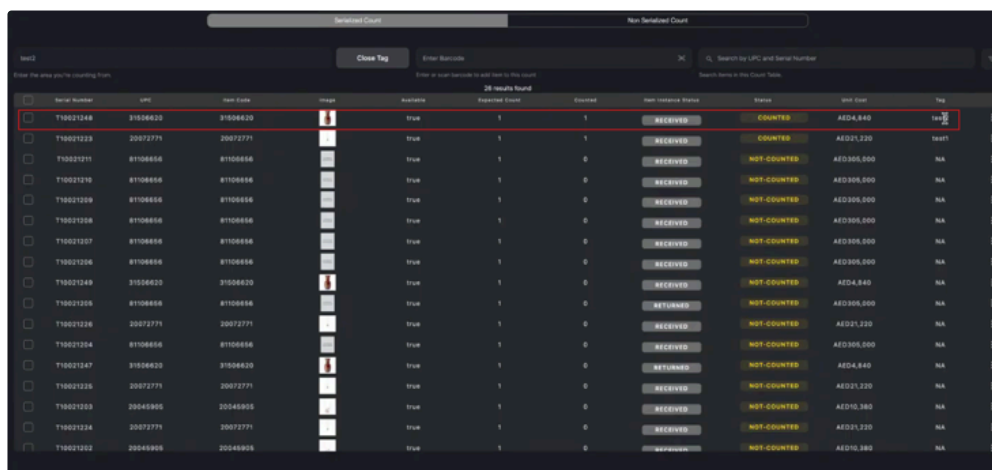
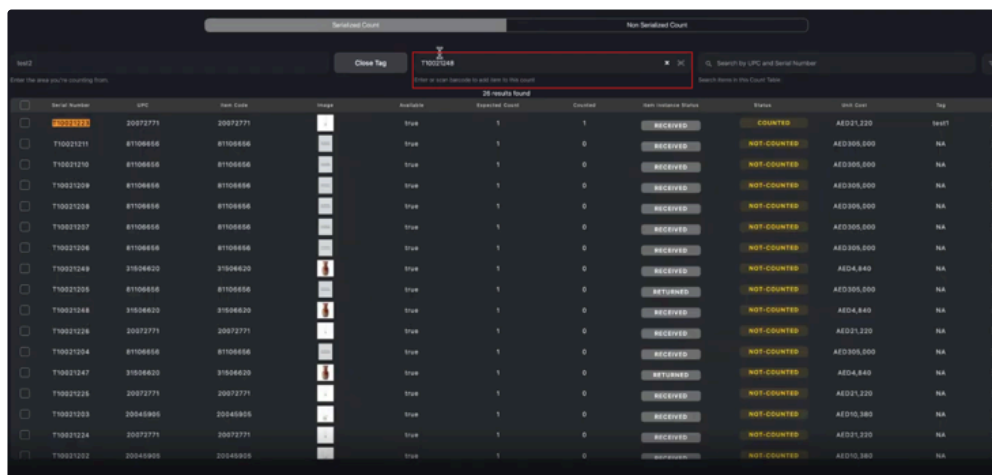
Serial Number	UPC	Item Code	Image	Available	Received Count	Counted	Item Receive Status	Status	Unit Cost	Tag
T10021225	20072771	20072771		True	1	1	RECEIVED	COUNTED	AED21,220	test2
T10021211	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021210	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T90021209	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T90021208	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021207	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T90021206	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T90021249	31506620	31506620		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T90021205	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021248	31506620	31506620		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T90021226	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T90021204	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED306,000	NA
T10021247	31506620	31506620		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T10021225	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T90021203	20044905	20044905		True	1	0	RECEIVED	NOT-COUNTED	AED10,380	NA
T10021224	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T10021222	20044905	20044905		True	1	0	RECEIVED	NOT-COUNTED	AED10,380	NA

Note: The system won't allow you to scan the serial number until the tag is assigned to it

11. Click **Activate Tag**.



12. Enter the Serial Number in Enter Barcode field.



Note: Status updates from NOT-COUNTED to COUNTED.

13. Click **Close Tag** after assigning the **Tag** to the **Serial Number**.

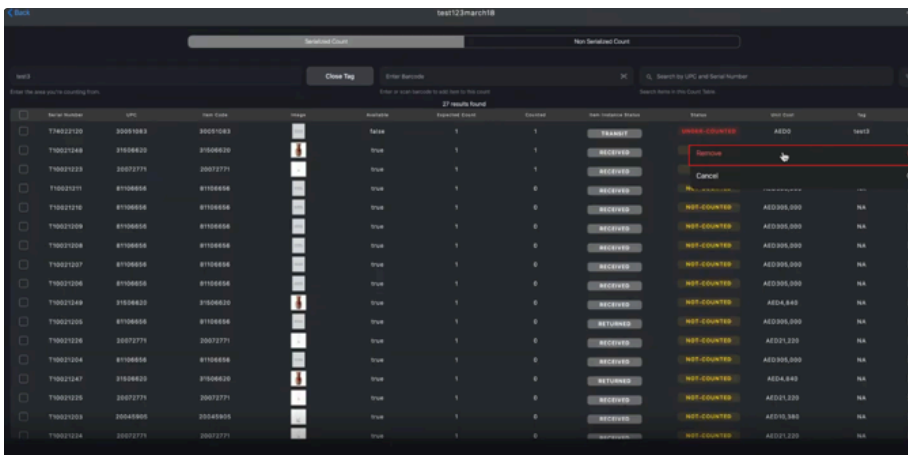
Serial Number	UPC	Item Code	Image	Barcode	Inventory Count	Quantity	Item Response Status	Status	Unit Cost	Tag
T90021244	31006030	31006030		True	1	1	RECEIVED	COUNTED	AED4,840	test12
T90021223	20072771	20072771		True	1	1	RECEIVED	COUNTED	AED21,220	test11
T90021211	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021210	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021209	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021208	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021327	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021256	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021049	31006030	31006030		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T90021205	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021226	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T90021204	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021247	31006030	31006030		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T90021225	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T90021223	20048905	20048905		True	1	0	RECEIVED	NOT-COUNTED	AED10,380	NA
T90021234	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T90021222	20048905	20048905		True	1	0	RECEIVED	NOT-COUNTED	AED10,380	NA

14. You can remove the item from the Serialized Count list:

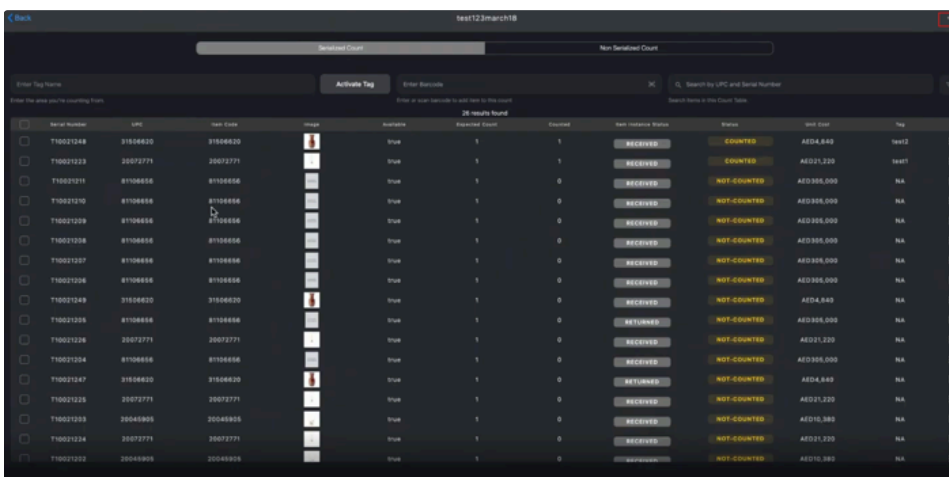
- Click the kebab menu of the serial number row to remove items not part of the current inventory count.

Serial Number	UPC	Item Code	Image	Barcode	Inventory Count	Quantity	Item Response Status	Status	Unit Cost	Tag
T90021210	30001083	30001083		True	1	1	RECEIVED	NOT-COUNTED	AED0	test13
T90021244	31006030	31006030		True	1	1	RECEIVED	COUNTED	AED4,840	test12
T90021223	20072771	20072771		True	1	1	RECEIVED	COUNTED	AED21,220	test11
T90021211	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021210	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021209	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021208	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021327	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021206	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021249	31006030	31006030		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T90021205	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021226	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T90021204	81108656	81108656		True	1	0	RECEIVED	NOT-COUNTED	AED300,000	NA
T90021247	31006030	31006030		True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T90021225	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA
T90021223	20048905	20048905		True	1	0	RECEIVED	NOT-COUNTED	AED10,380	NA
T90021234	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21,220	NA

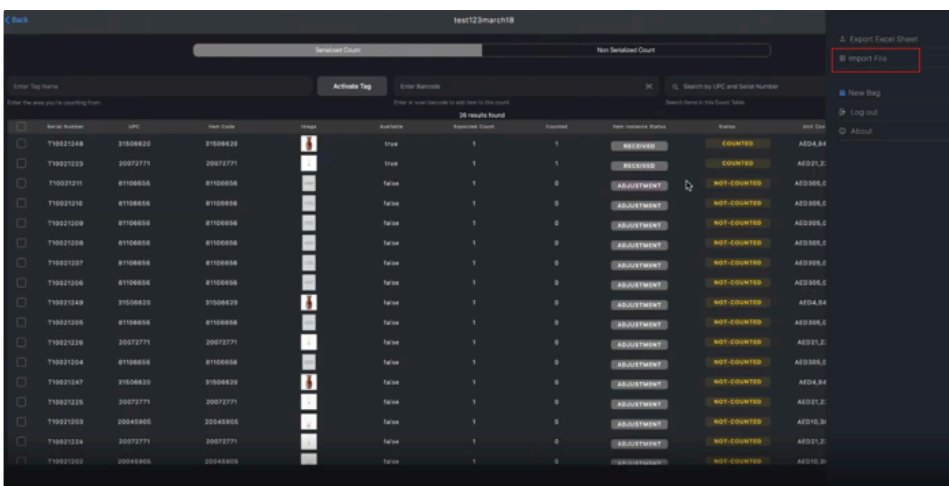
- Click **Remove** to remove the item from list.



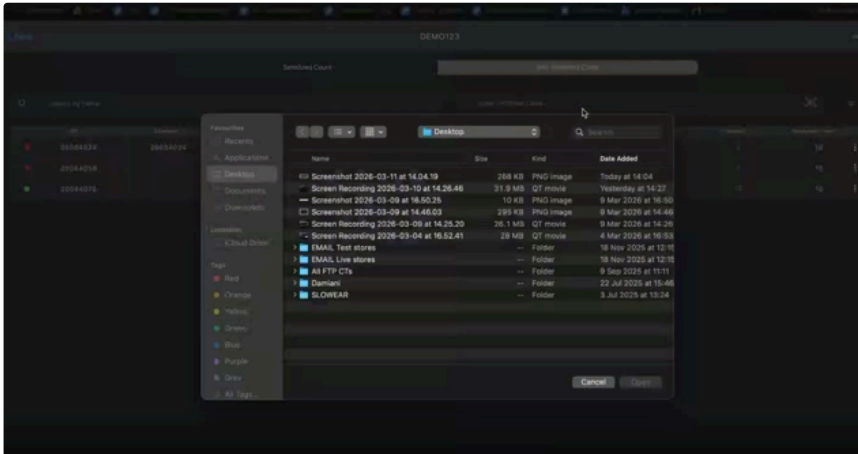
15. You can add the new list by [importing the file](#)
 - a. Click the meatballs menu in the upper-right corner.



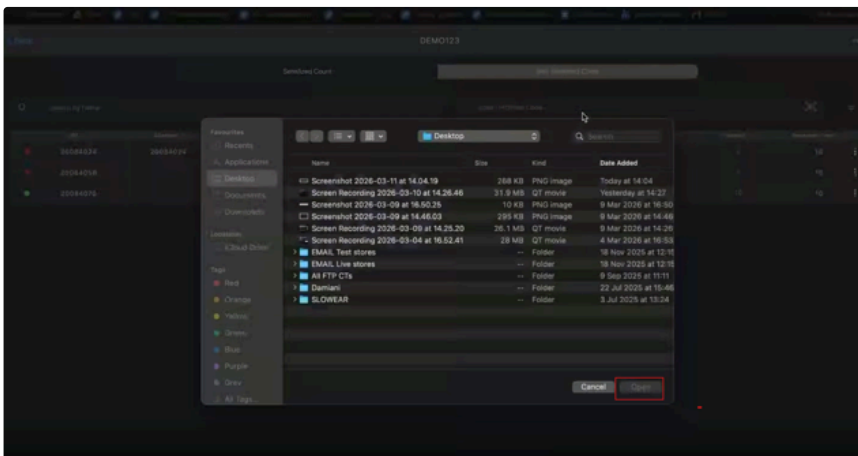
- b. Click the **Import File**.



c. Select the New Count Excel File from your system.



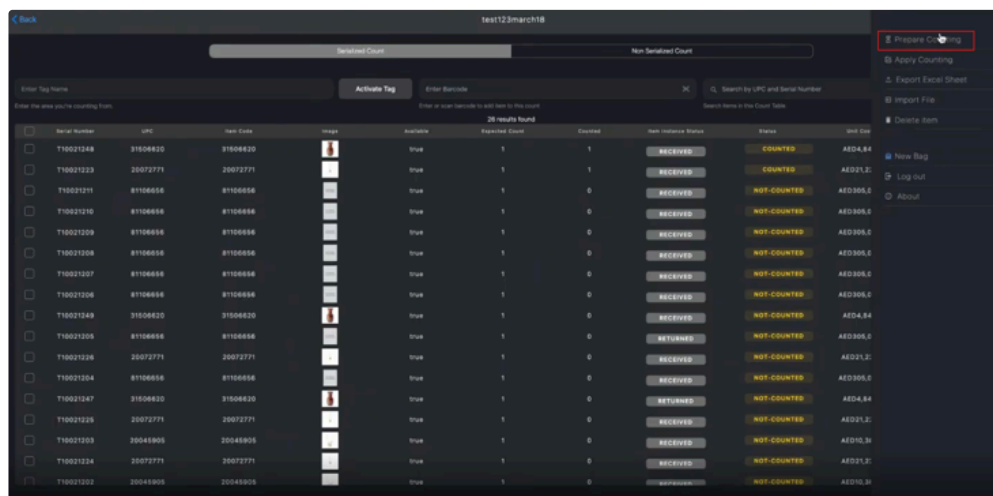
d. Click **Open** to Upload the file.



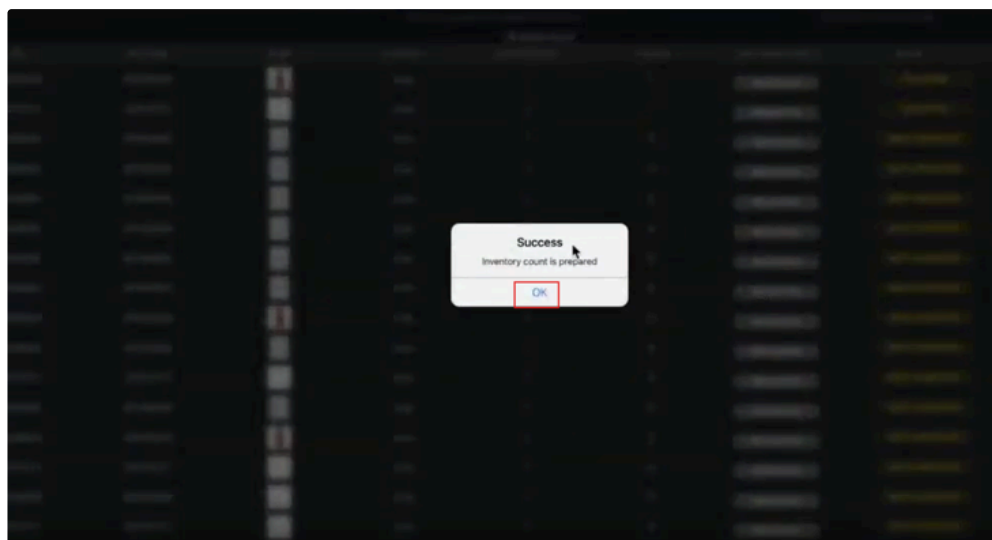
16. Click the meatballs menu in the upper-right corner again.

Serial Number	UPC	Item Code	Item	Location	Quantity	Received	Item Barcode Status	Status	Price	Tag
710021344	31004620	81006620	Meatballs	1	1	RECEIVED	COUNTED	AE04,840	10412	
710021323	20072771	20072771	Meatballs	1	1	RECEIVED	COUNTED	AE02,220	10411	
710021311	81006656	81006656	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE0305,000	NA	
710021310	81006656	81006656	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE0305,000	NA	
710021309	81006656	81006656	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE0305,000	NA	
710021308	81006656	81006656	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE0305,000	NA	
710021307	81006656	81006656	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE0305,000	NA	
710021306	81006656	81006656	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE0305,000	NA	
710021349	31004620	31004620	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE04,840	NA	
710021326	81006656	81006656	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE0305,000	NA	
710021326	20072771	20072771	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE02,220	NA	
710021324	81006656	81006656	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE0305,000	NA	
710021347	31004620	31004620	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE04,840	NA	
710021325	20072771	20072771	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE02,220	NA	
710021303	30040905	30040905	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE010,000	NA	
710021324	20072771	20072771	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE02,220	NA	
710021322	30040905	30040905	Meatballs	1	0	RECEIVED	NOT-COUNTED	AE010,000	NA	

17. Click **Prepare Counting**.



18. Click **OK** in the **Success** pop-up to prepare the inventory count.



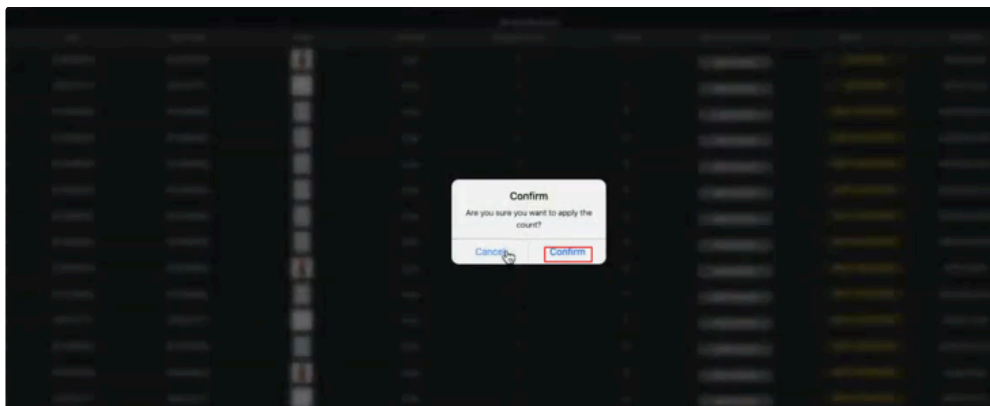
19. Click the meatballs menu in the upper-right corner again.

Serial Number	UPC	Item Code	Image	Available	Expected Count	Counted	Item Instance Status	Status	Unit Cost	Tag
T90021248	31006620	31006620		True	1	1	RECEIVED	COUNTED	AED4.840	test12
T90021223	20072771	20072771		True	1	1	RECEIVED	COUNTED	AED21.220	test1
T90021211	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.000	NA
T90021210	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.000	NA
T90021209	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.000	NA
T90021208	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.000	NA
T90021207	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.000	NA
T90021206	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.000	NA
T90021249	31006620	31006620		True	1	0	RECEIVED	NOT-COUNTED	AED4.840	NA
T90021246	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.000	NA
T90021228	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21.220	NA
T90021254	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.000	NA
T90021247	31006620	31006620		True	1	0	RECEIVED	NOT-COUNTED	AED4.840	NA
T90021225	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21.220	NA
T90021203	20048905	20048905		True	1	0	RECEIVED	NOT-COUNTED	AED10.380	NA
T90021234	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21.220	NA
T90021232	20048905	20048905		True	1	0	RECEIVED	NOT-COUNTED	AED10.380	NA

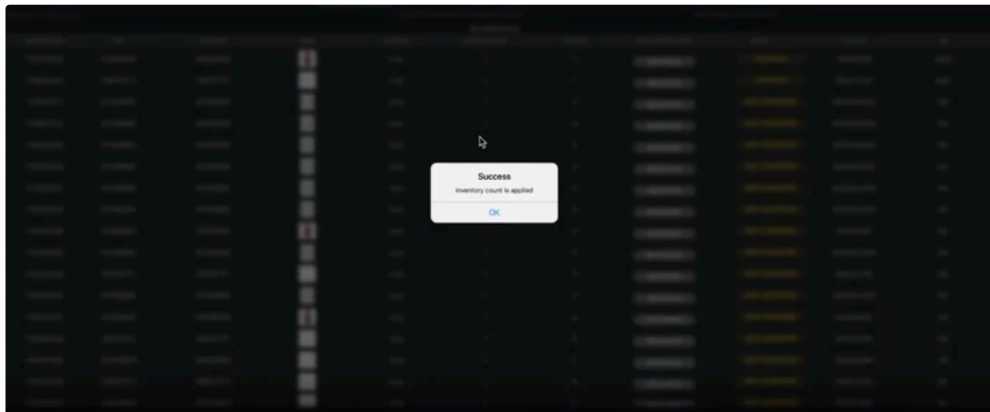
20. Click the **Apply Counting**.

Serial Number	UPC	Item Code	Image	Available	Expected Count	Counted	Item Instance Status	Status	Unit Cost	Tag
T90021248	31006620	31006620		True	1	1	RECEIVED	COUNTED	AED4.84	
T90021223	20072771	20072771		True	1	1	RECEIVED	COUNTED	AED21.2	
T90021211	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.0	
T90021210	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.0	
T90021209	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.0	
T90021208	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.0	
T90021207	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.0	
T90021206	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.0	
T9002149	31006620	31006620		True	1	0	RECEIVED	NOT-COUNTED	AED4.84	
T90021205	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.0	
T90021236	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21.2	
T90021284	81106656	81106656		True	1	0	RECEIVED	NOT-COUNTED	AED305.0	
T90021247	31006620	31006620		True	1	0	RECEIVED	NOT-COUNTED	AED4.84	
T90021226	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21.2	
T90021203	20048905	20048905		True	1	0	RECEIVED	NOT-COUNTED	AED10.3	
T90021234	20072771	20072771		True	1	0	RECEIVED	NOT-COUNTED	AED21.2	
T90021232	20048905	20048905		True	1	0	RECEIVED	NOT-COUNTED	AED10.3	

21. Click **OK** in the **Confirm** pop-up to apply the inventory count.



22. Click **OK** in the **Success** pop-up.



test123march18

Serialized Count Non Serialized Count

Enter Tag Name Activate Tag Enter Barcode Search by UPC and Serial Number

Enter the area you're counting from. Enter in size (barcode if you have it) Search items in the Count Table

28 results found

Serial Number	UPC	Item Code	Image	Available	Serialized Count	Counted	Item Instance Status	Status	Unit Cost	Tag
<input type="checkbox"/> T10021246	31508820	31508820		true	1	1	RECEIVED	COUNTED	AED1,840	NA#2
<input type="checkbox"/> T10021238	20072771	20072771		true	1	1	RECEIVED	COUNTED	AED1,220	NA#1
<input type="checkbox"/> T10021211	81106656	81106656		false	1	0	ADJUSTMENT	NOT-COUNTED	AED306,000	NA
<input type="checkbox"/> T10021210	81106656	81106656		false	1	0	ADJUSTMENT	NOT-COUNTED	AED306,000	NA
<input type="checkbox"/> T10021209	81106656	81106656		true	1	0	ADJUSTMENT	NOT-COUNTED	AED306,000	NA
<input type="checkbox"/> T10021208	81106656	81106656		false	1	0	ADJUSTMENT	NOT-COUNTED	AED306,000	NA
<input type="checkbox"/> T10021207	81106656	81106656		false	1	0	ADJUSTMENT	NOT-COUNTED	AED306,000	NA
<input type="checkbox"/> T10021206	81106656	81106656		false	1	0	ADJUSTMENT	NOT-COUNTED	AED306,000	NA
<input type="checkbox"/> T10021248	31508820	31508820		false	1	0	ADJUSTMENT	NOT-COUNTED	AED1,840	NA
<input type="checkbox"/> T10021205	81106656	81106656		false	1	0	ADJUSTMENT	NOT-COUNTED	AED306,000	NA
<input type="checkbox"/> T10021228	20072771	20072771		false	1	0	ADJUSTMENT	NOT-COUNTED	AED1,220	NA
<input type="checkbox"/> T10021244	81106656	81106656		false	1	0	ADJUSTMENT	NOT-COUNTED	AED306,000	NA
<input type="checkbox"/> T10021247	31508820	31508820		false	1	0	ADJUSTMENT	NOT-COUNTED	AED1,840	NA
<input type="checkbox"/> T10021226	20072771	20072771		false	1	0	ADJUSTMENT	NOT-COUNTED	AED1,220	NA
<input type="checkbox"/> T10021203	20049905	20049905		false	1	0	ADJUSTMENT	NOT-COUNTED	AED10,380	NA
<input type="checkbox"/> T10021234	20072771	20072771		false	1	0	ADJUSTMENT	NOT-COUNTED	AED1,220	NA
<input type="checkbox"/> T10021202	20049905	20049905		false	1	0	ADJUSTMENT	NOT-COUNTED	AED10,380	NA

Note: After you apply the inventory count, the system updates the **Available** column to **true** for counted items and to **false** for uncounted items.

23. Sign in to [Item Instance Sheet](#).

24. Paste the **Serial Number** the search box.

Item Instance
Last Viewed: March 17th 2026 at 3:37 pm by admin 190

Item Name	VENDOR LOCATION	ITEM	CHANNEL TYPE	AVAILABLE	LIFECYCLE STATUS	STATUS	COMMISSION	ID	UPC	LIFECYCLE DATE	CONSUMER NAME	LIST PRICE	DISPLAYED	SIZE	NAME
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	True	Sold			12334543	20000838	Jun 25, 2025 1:58:55 PM					White gold and dia
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Transit			90383769	20000882	Jun 25, 2025 9:35:27 AM					White gold watch
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Transit			44256820	20000330	Jun 25, 2025 9:32:26 PM					PG BARROSS DIAL
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold			192234	20000838	Jun 16, 2025 10:54:57 AM					White gold and dia
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold			5243	81902376	Jun 16, 2025 11:47:27 AM					MS NECKLACE DV
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold			134359	20000614	Aug 28, 2025 9:32:04 PM					Pink gold necklace
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	True				23923	20000838						White gold and dia
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	True				31572	20000838						White gold and dia
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	True				1032321	20000838						White gold and dia
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	True				6348648	20000838						White gold and dia
VENNI DUBAI MALL-TEST	DABHANI DUBAI-TEST	VENNI DUBAI MALL-TEST	Retail	False	Transit	com		17962703	30001063	Oct 1, 2025 10:10:01 AM					BAUGH MINI HGR10
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Transit			1687029	20000330	Aug 13, 2025 8:05:18 AM					PG BARROSS DIAL
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold			12364789	20000838	Sep 16, 2025 7:09:01 AM					White gold and dia
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold			80765434	20002061	Sep 16, 2025 7:09:52 AM					Green ceramic and
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold	com		17382464	20003470	Sep 16, 2025 9:58:54 AM					Pink gold ring, 6.7
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold			73365373	20072766	Sep 19, 2025 2:57:37 PM					Pink gold, brown d
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold	com		173826375	20083322	Sep 18, 2025 3:38:06 PM					Yellow gold neckle
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold			20100014	20000838	Sep 23, 2025 1:43:59 PM					Pink gold necklace
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold			12123434	20000838	Oct 14, 2025 7:32:18 AM					White gold and dia
VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	VENNI DUBAI MALL-TEST	Retail	False	Sold			12344	20000838	Jun 25, 2025 1:49:32 PM					White gold and dia

25. Verify the **Available** column for the specific row is **true**.

Item Instance
Last Viewed: March 17th 2026 at 3:37 pm by admin 190

Item Name	VENDOR LOCATION	ITEM	CHANNEL TYPE	AVAILABLE	LIFECYCLE STATUS	STATUS	COMMISSION	ID	UPC	LIFECYCLE DATE	CONSUMER NAME	LIST PRICE	DISPLAYED	SIZE	NAME
VENNI DUBAI MALL-TEST	M001 - CASA DAMIAN S.P.A. SEDE	VENNI DUBAI MALL-TEST	Retail	True	Received	com		T10021448	31006620	Mar 16, 2026 8:18:44 AM					OPALINO TC

26. Click the meatballs menu in the upper-right corner again.

Non-Searched Count

Item ID	Item Code	Item Name	Status	Quantity	Price	Item Instance Status	Price	Unit Cost	Tag
T10021448	31006620	31006620	True	1	0	RECEIVED	COUNTED	AED4,840	16412
T10021223	20072771	20072771	True	1	0	RECEIVED	COUNTED	AED3,220	16411
T10021211	81106656	81106656	True	1	0	RECEIVED	NOT-COUNTED	AED305,000	NA
T10021210	81106656	81106656	True	1	0	RECEIVED	NOT-COUNTED	AED305,000	NA
T10021209	81106656	81106656	True	1	0	RECEIVED	NOT-COUNTED	AED305,000	NA
T10021208	81106656	81106656	True	1	0	RECEIVED	NOT-COUNTED	AED305,000	NA
T10021207	81106656	81106656	True	1	0	RECEIVED	NOT-COUNTED	AED305,000	NA
T10021206	81106656	81106656	True	1	0	RECEIVED	NOT-COUNTED	AED305,000	NA
T10021249	31006620	31006620	True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T10021256	81106656	81106656	True	1	0	RECEIVED	NOT-COUNTED	AED305,000	NA
T10021246	20072771	20072771	True	1	0	RECEIVED	NOT-COUNTED	AED3,220	NA
T10021254	81106656	81106656	True	1	0	RECEIVED	NOT-COUNTED	AED305,000	NA
T10021247	31006620	31006620	True	1	0	RECEIVED	NOT-COUNTED	AED4,840	NA
T10021226	20072771	20072771	True	1	0	RECEIVED	NOT-COUNTED	AED3,220	NA
T10021255	20049905	20049905	True	1	0	RECEIVED	NOT-COUNTED	AED16,385	NA
T10021224	20072771	20072771	True	1	0	RECEIVED	NOT-COUNTED	AED3,220	NA
T10021253	20049905	20049905	True	1	0	RECEIVED	NOT-COUNTED	AED16,385	NA

27. Click the **Export Excel Sheet** to download the report in Excel or CSV.

test123march18

Serialized Count: 0 Non-Serialized Count: 0

Export Excel Sheet
Report File

Enter Tag Name: Activate Tag Enter Barcode: Search by UPC and Serial Number

Enter the area you're counting from: Enter an item barcode to add items to the count Search items in the Count State

28 results found

Serial Number	UPC	Item Code	Image	Barcode	Serialized Count	Counted	Item Location	Status	Value
<input type="checkbox"/> T10021048	3106820	3106820		True	1	1	RECEIVED	COUNTED	AED4.84
<input type="checkbox"/> T10021028	20072771	20072771		True	1	1	RECEIVED	COUNTED	AED21.31
<input type="checkbox"/> T10021011	81108656	81108656		False	1	0	ADJUSTMENT	NOT-COUNTED	AED398.0
<input type="checkbox"/> T10021010	81108656	81108656		False	1	0	ADJUSTMENT	NOT-COUNTED	AED398.0
<input type="checkbox"/> T10021009	81108656	81108656		False	1	0	ADJUSTMENT	NOT-COUNTED	AED398.0
<input type="checkbox"/> T10021008	81108656	81108656		False	1	0	ADJUSTMENT	NOT-COUNTED	AED398.0
<input type="checkbox"/> T10021007	81108656	81108656		False	1	0	ADJUSTMENT	NOT-COUNTED	AED398.0
<input type="checkbox"/> T10021006	81108656	81108656		False	1	0	ADJUSTMENT	NOT-COUNTED	AED398.0
<input type="checkbox"/> T10021049	3106820	3106820		False	1	0	ADJUSTMENT	NOT-COUNTED	AED4.84
<input type="checkbox"/> T10021005	81108656	81108656		False	1	0	ADJUSTMENT	NOT-COUNTED	AED398.0
<input type="checkbox"/> T10021026	20072771	20072771		False	1	0	ADJUSTMENT	NOT-COUNTED	AED21.31
<input type="checkbox"/> T10021004	81108656	81108656		False	1	0	ADJUSTMENT	NOT-COUNTED	AED398.0
<input type="checkbox"/> T10021047	3106820	3106820		False	1	0	ADJUSTMENT	NOT-COUNTED	AED4.84
<input type="checkbox"/> T10021025	20072771	20072771		False	1	0	ADJUSTMENT	NOT-COUNTED	AED21.31
<input type="checkbox"/> T10021003	20045905	20045905		False	1	0	ADJUSTMENT	NOT-COUNTED	AED10.31
<input type="checkbox"/> T10021024	20072771	20072771		False	1	0	ADJUSTMENT	NOT-COUNTED	AED21.31
<input type="checkbox"/> T10021002	20045905	20045905		False	1	0	ADJUSTMENT	NOT-COUNTED	AED10.31

New Tag Log out About

Inventory Count Import File Template

Introduction

This topic describes the structure and usage of the Excel template used to import inventory count data into the system. The template supports both **Serialized** and **Non-Serialized** inventory counts.

Non Serialized Inventory Count Template

Column Name	Requirement
UPC	Mandatory. Identifies the product.
Counted	Enter the total counted quantity for the item.

Serialized Inventory Count Template

Column Name	Requirement
Serial Number	Mandatory. Unique identifier for each item.
Counted	Enter 1 if the item is physically present, otherwise 0 .

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