Genius Pos User Manual

Content

Making a Sale (Back to Content)

Starting a new sale

To start a new sale simply click on "New Transaction" located at the left top.
"New Transaction" is default to takeaway transaction.
To start a new dine in transaction, select "Table" or "Table Layout" to assign a table.

Adding orders to receipt

Orders punched in will appear in receipt on the left immediately.
Orders will be sent to kitchen after "Hold Bill/Send Order", "Pay" or "Checkout" is clicked.
Orders that are not sent to kitchen will not be registered in the transaction.

Closing a sale

The simplest and fastest way to close a sale is to click on the "Checkout" button.
It will prompt you to close the bill with the exact amount and default payment type.

The usual way to close a bill:
1) Click on "Pay" button.
2) Select the payment mode.
3) Enter the amount received.
4) Click on "Cash In".
5) If the amount received is sufficient for the bill, "Checkout" button will be enabled.
6) Click "Checkout" to close the bill.

To close a bill with multiple payment type.
Upon cashing in, select another payment type, enter the amount received and cash in again.
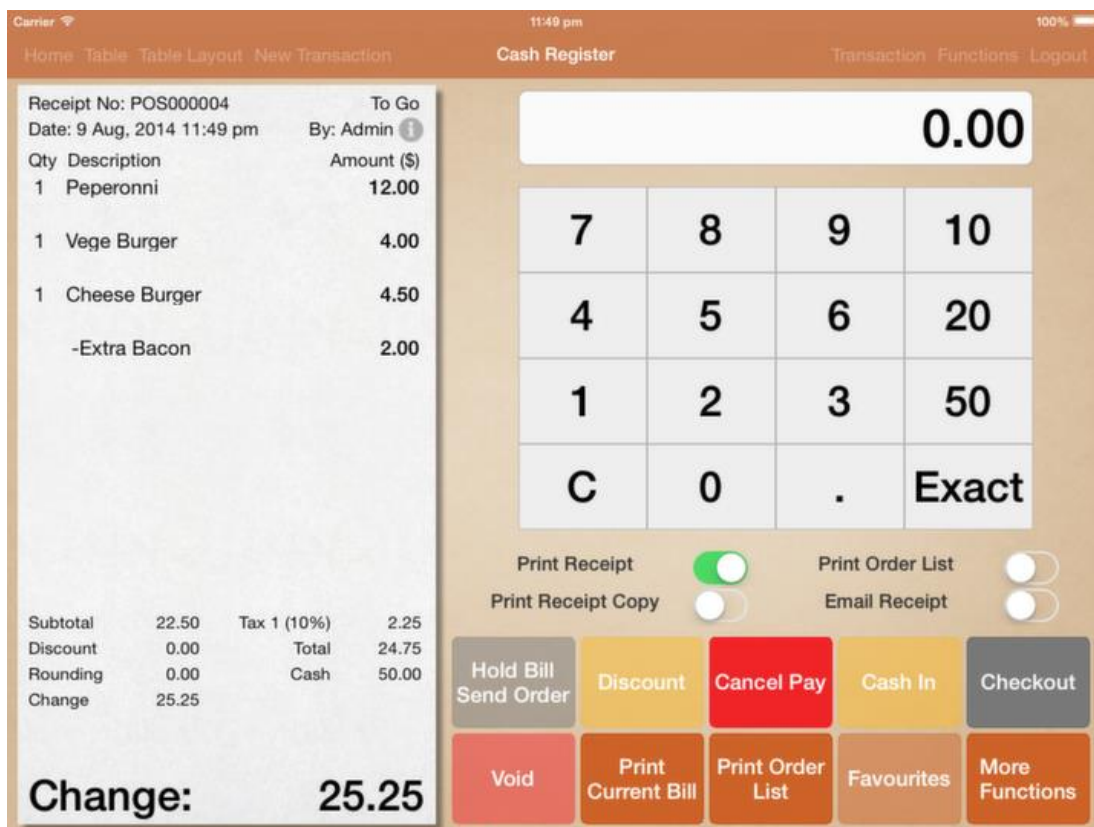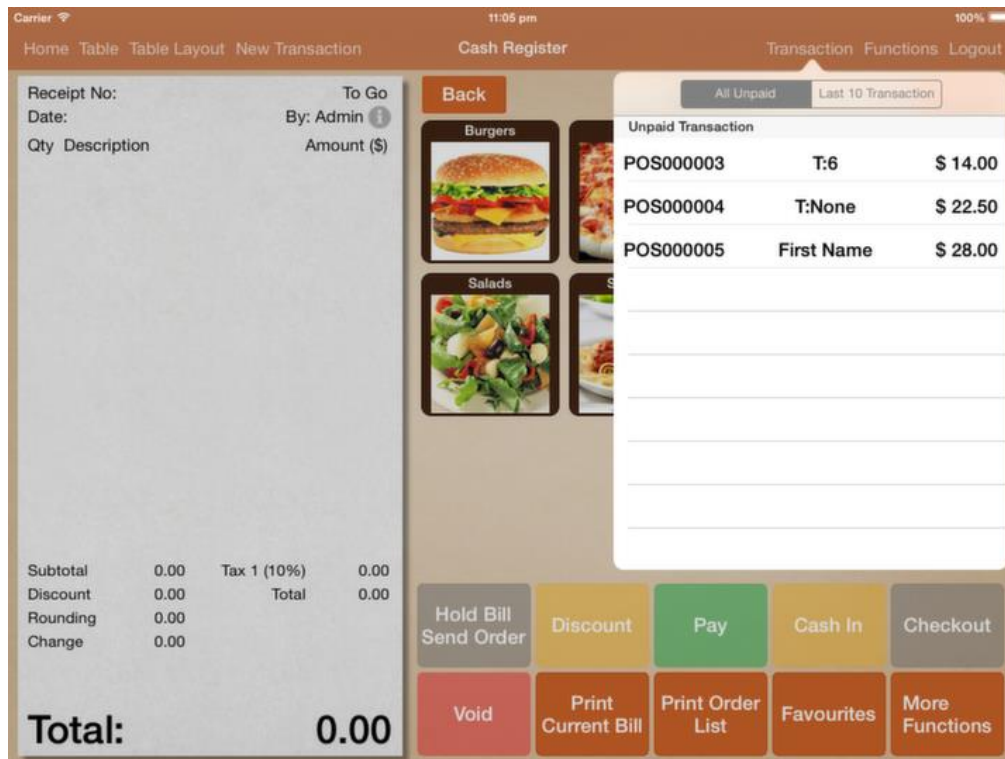

Print receipt upon request

Receipt printing can be turned off or on when needed.
To turn off receipt printing, toggle the switches that will appear on step 5).
Setting is saved permanently and will apply for the next transaction as well.
To email your customer the receipt, turn on "Email Receipt".

Transaction/Table [(Back to Content)](#)

Unpaid Transaction

To retrieve unpaid transaction, simply tap on the "Transaction" button.
All opened transaction will be listed under "All Unpaid".
Under "Last 10 Transaction", you will find the last 10 paid and unpaid bills.
To retrieve transaction earlier than that, find it under "Settings" -> "Previous Receipts".
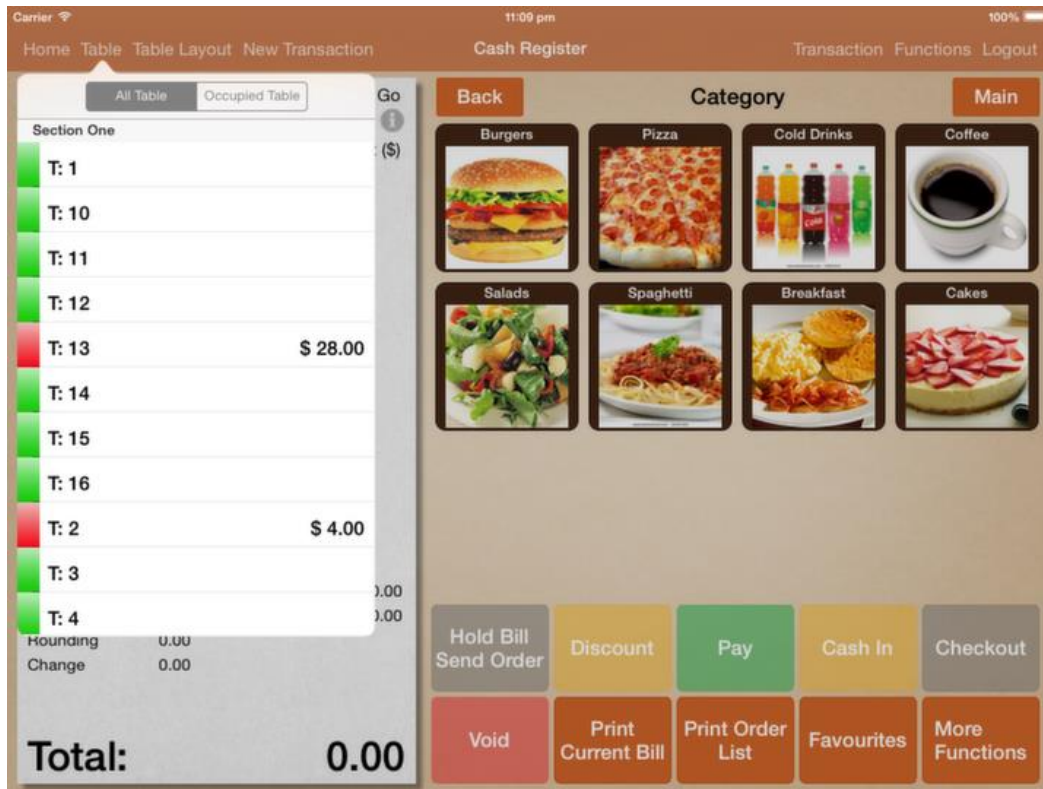
Table List
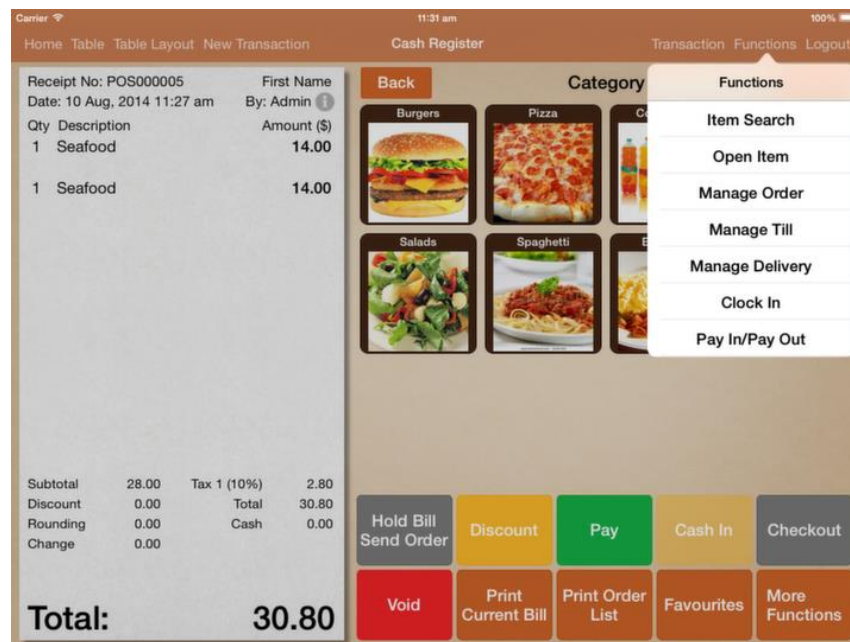
To retrieve unpaid transaction by table, simply tap on the "Table" button.
It gives you an overview of all your table status in a listing format.
To view only occupied table, tap on "Occupied Table".

Functions

A list of function that can be accessed in cash register.
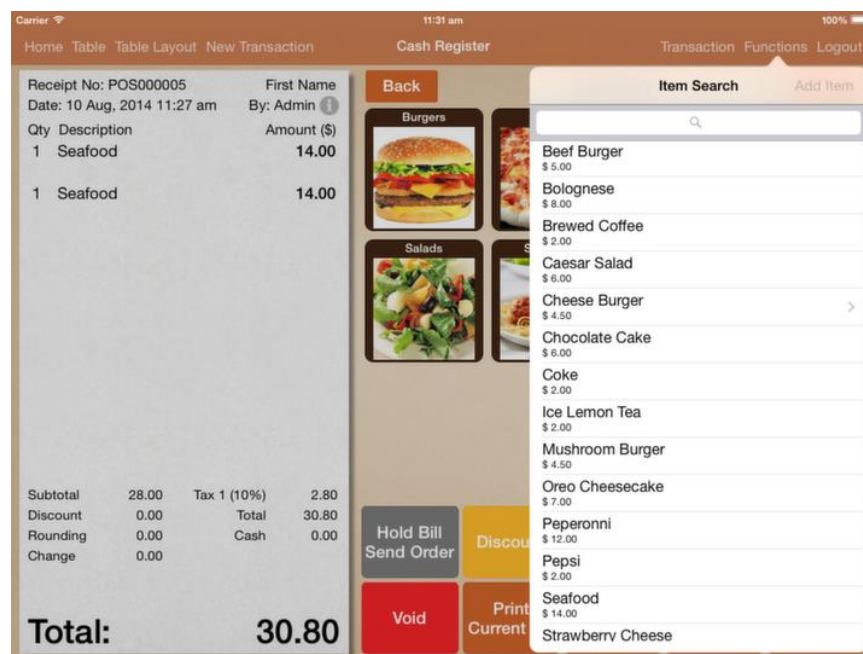
Item Search

Item search gives you a quick search on item name.
Item with modifier is marked with an arrow beside.
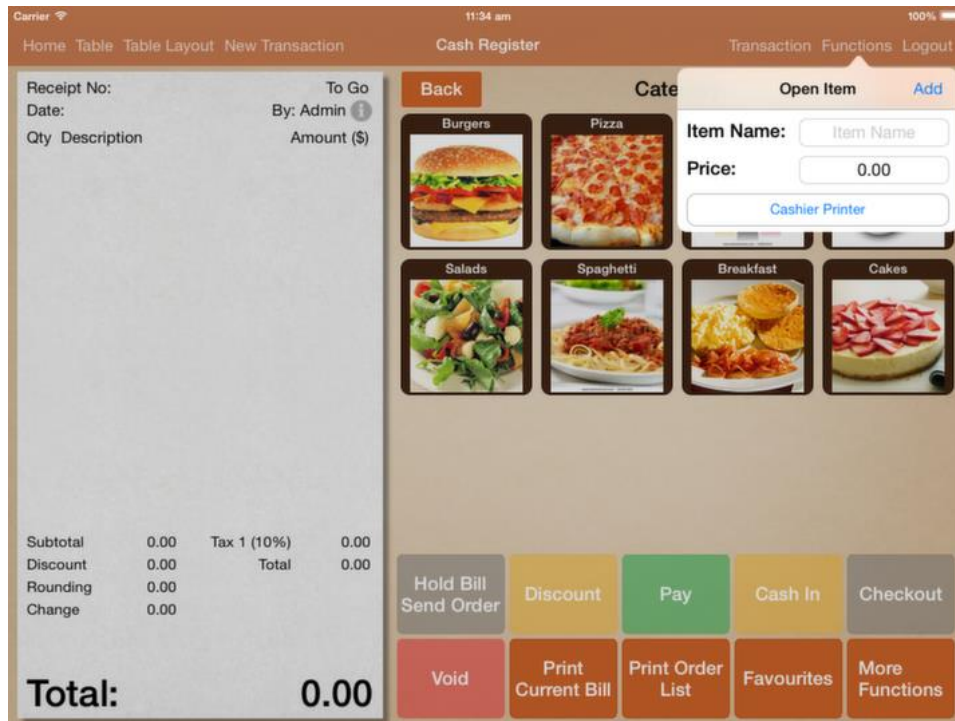
Open Item

For miscellaneous item, you could use open item.
Assign the kitchen printer if item has to be sent to kitchen.
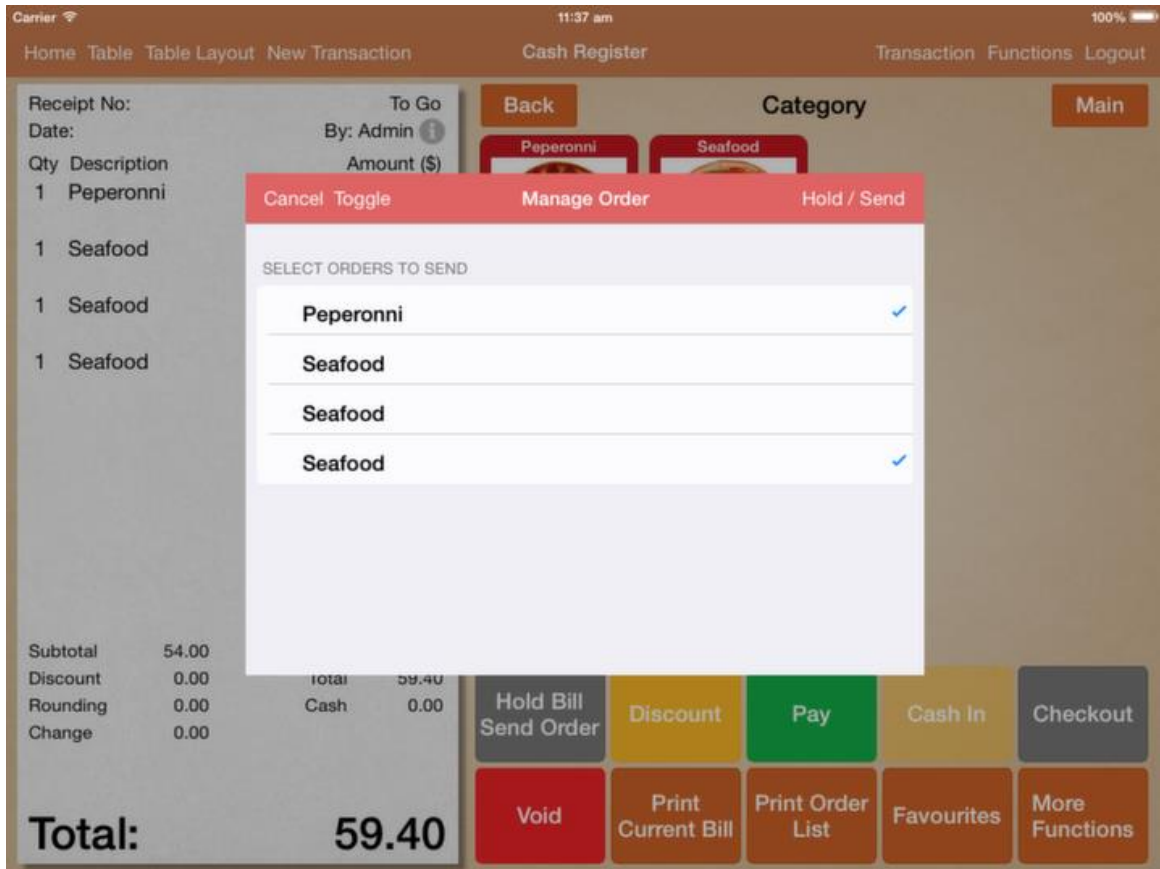
Manage Order

For order that has not been sent to kitchen, you could choose which order to be sent.

For example you could key in all customer orders but only fire the appetizers first.

Order that has not been sent to kitchen will be marked as red.

Manage Till

Before operation starts, key in the amount of cash you have in your till.
At the end of the day, manage till tells you how much cash you should have.
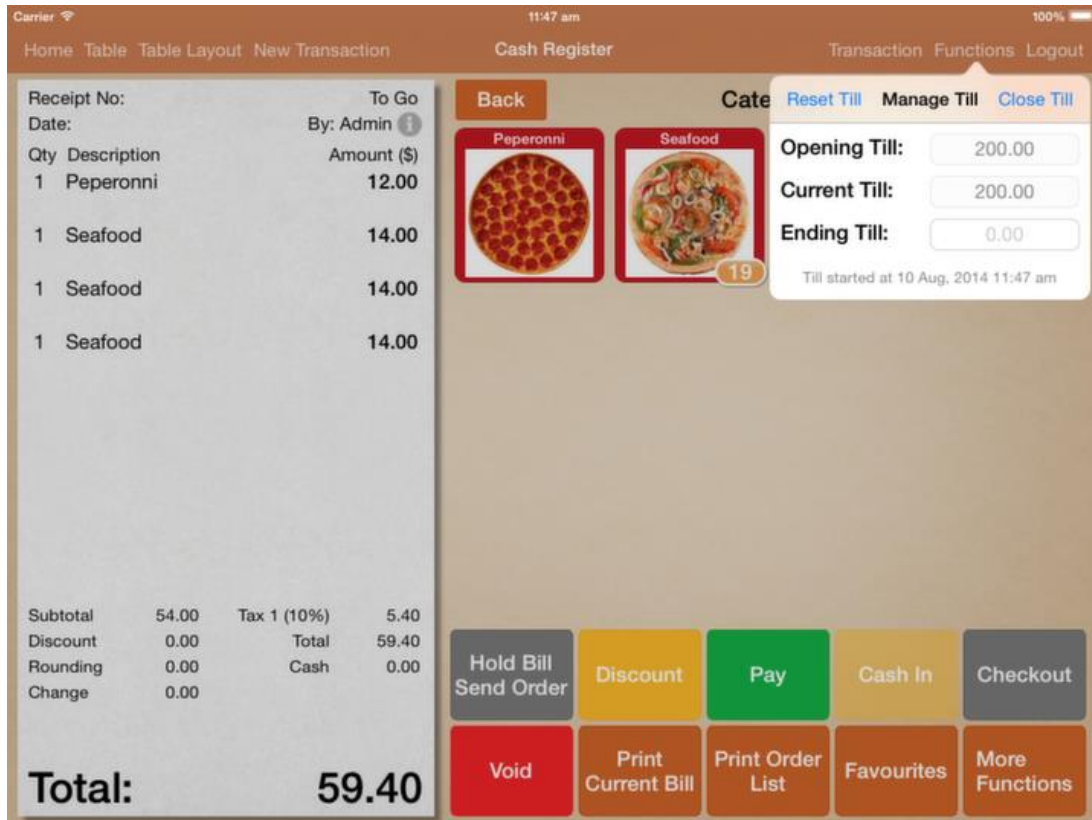Close the till by entering the amount of cash you have and report will show the difference.

Under "X Reading" report, cash till balance will show cash till that is started on that day.
For example, cash till started on 1st of Aug, but closed on 2nd of Aug.
1st of Aug report will show the till balance but not 2nd of Aug.

(Back to Content)
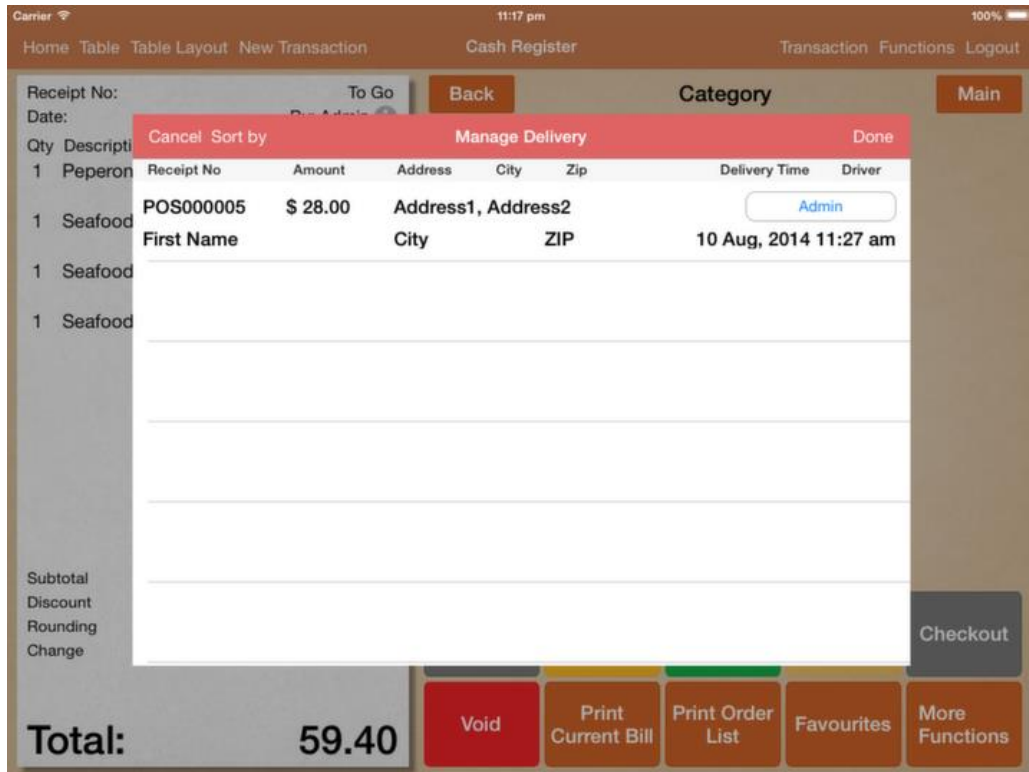
Manage Delivery

Manage delivery gives you an overview of all your delivery transaction.
You could assign driver for each of the transaction based on the location and delivery time.

Clock In/Clock Out

If the logged user has not clocked in, "Clock In" will be displayed.
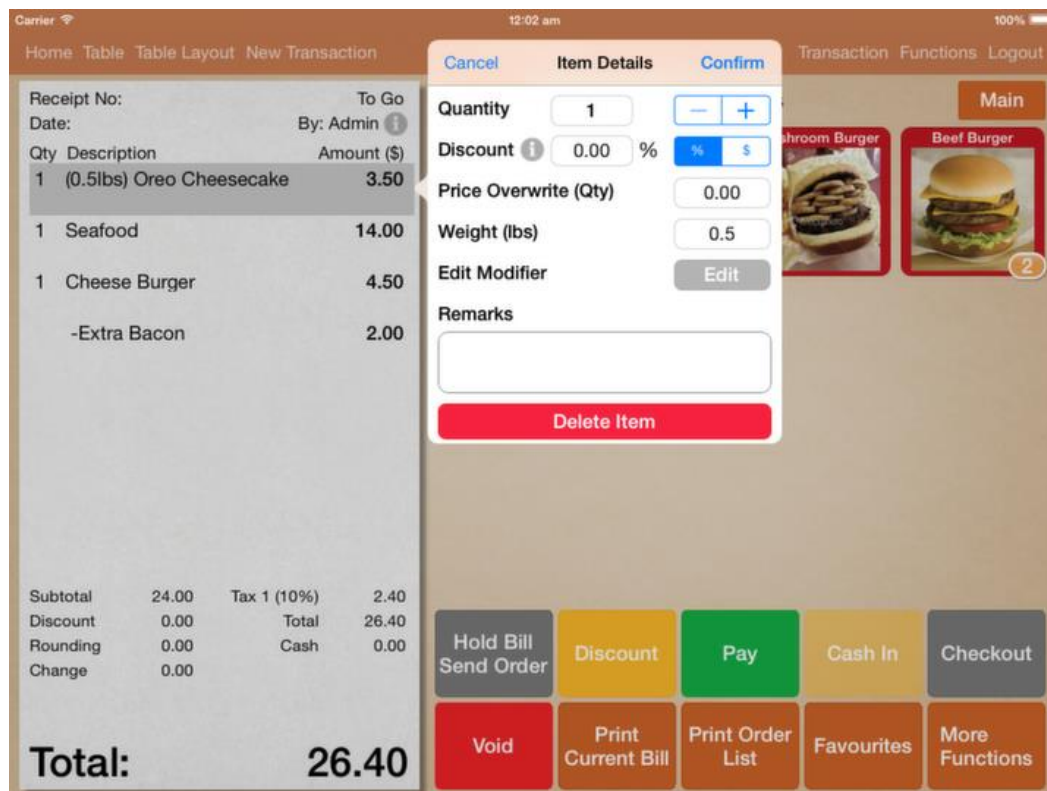If logged user has clocked in, it will display their clock in time and "Clock Out" will be displayed.
User can only clock in for themselves and they can clock in/out multiple times a day.

Pay In/Pay Out

Pay In/Pay Out let you manage your cash that is deposited or removed from the cash drawer.
Use a negative value for cashing out.

(Back to Content)

Order Details[(Back to Content)](#)

Quantity

You could change the quantity of each order.
Click on the quantity count and enter the quantity if you have a large amount of order.

Order Discount

Discount can be given by percentage or by price.
To apply discount that has been setup under discount, click on the "info" button.

Price Overwrite

Price can be overwritten. However price cannot be overwritten with 0 price.

Edit Modifier

For order that has not been sent to kitchen, you could still modify the modifier for this item.

Weight

For order that is sold by weight, edit the weight and price will be recalculated based on the new weight.

Remarks

Remarks will be printed to the kitchen.
If configured, remarks can be printed under customer receipt and order list as well.

Receipt Information

Assigning customer to receipt

Under receipt information tab, you could enter customer name and phone number.
Customer name and phone number will be printed on bill.
Kitchen docket will show customer name.
To assign a customer account, click on "Customer" button and search for the customer.
To remove customer account, click on the selected customer to remove.

Receipt remarks

Receipt remarks will be printed on all kitchen docket.
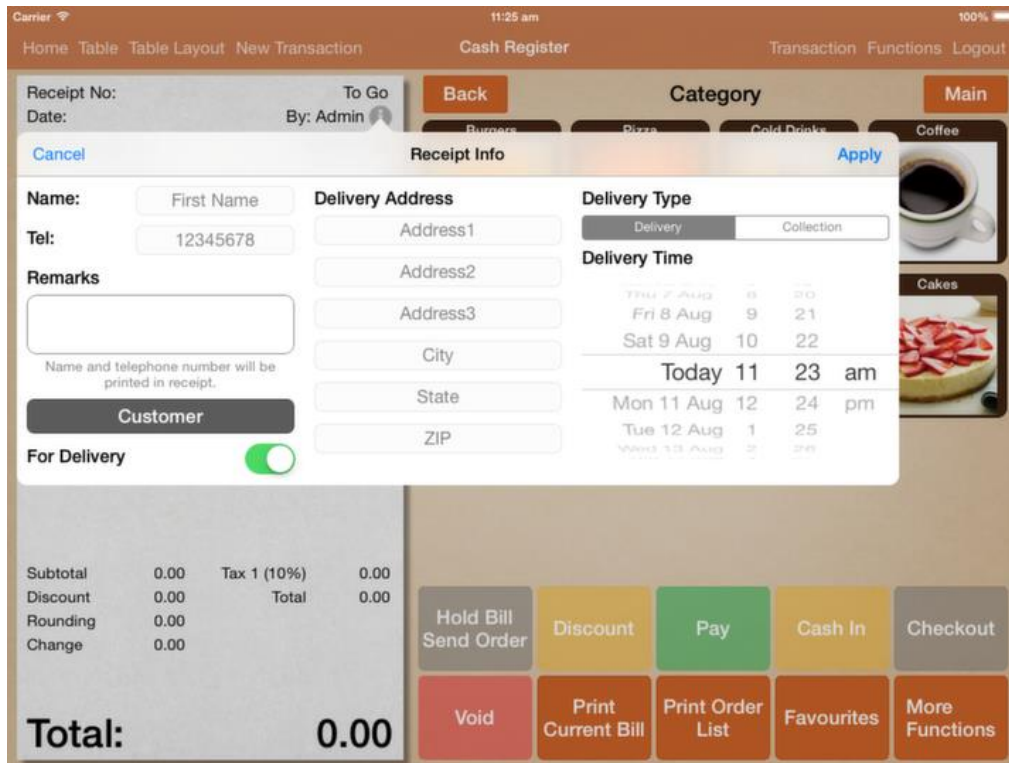
Delivery

To set the bill as delivery, switch on "For Delivery".
Delivery address will be filled up if a customer account is set.
Delivery type can be configured to delivery or collection.
Bill will print out delivery address.

Discount [(Back to Content)](#)
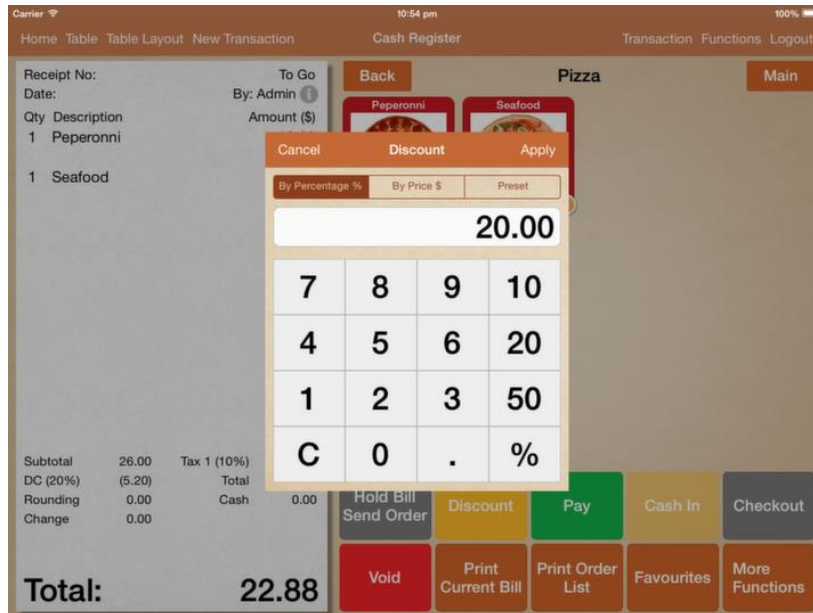
Bill Discount

Discount must be applied before payment. You can discount by percentage, price or preset discount.
For item discount, please refer to Order Details.
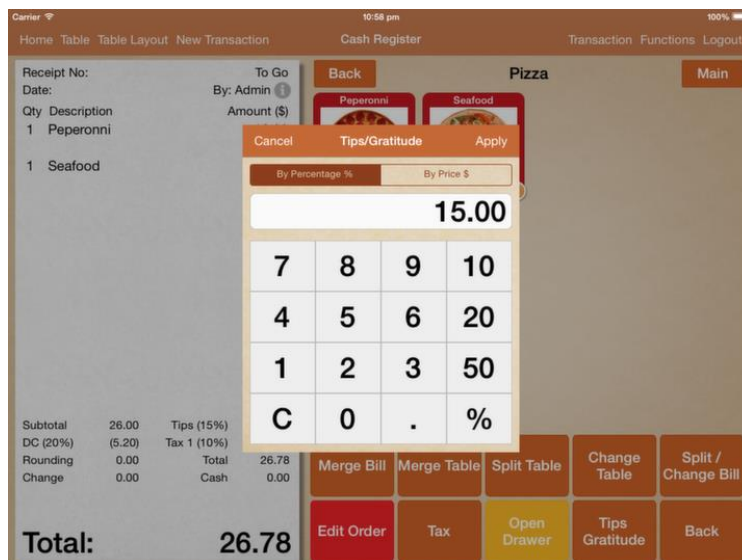
Tips/Gratitude

Tips/Gratitude must be applied before payment as well.
Tips will be calculated based on subtotal before discount.

Favourite
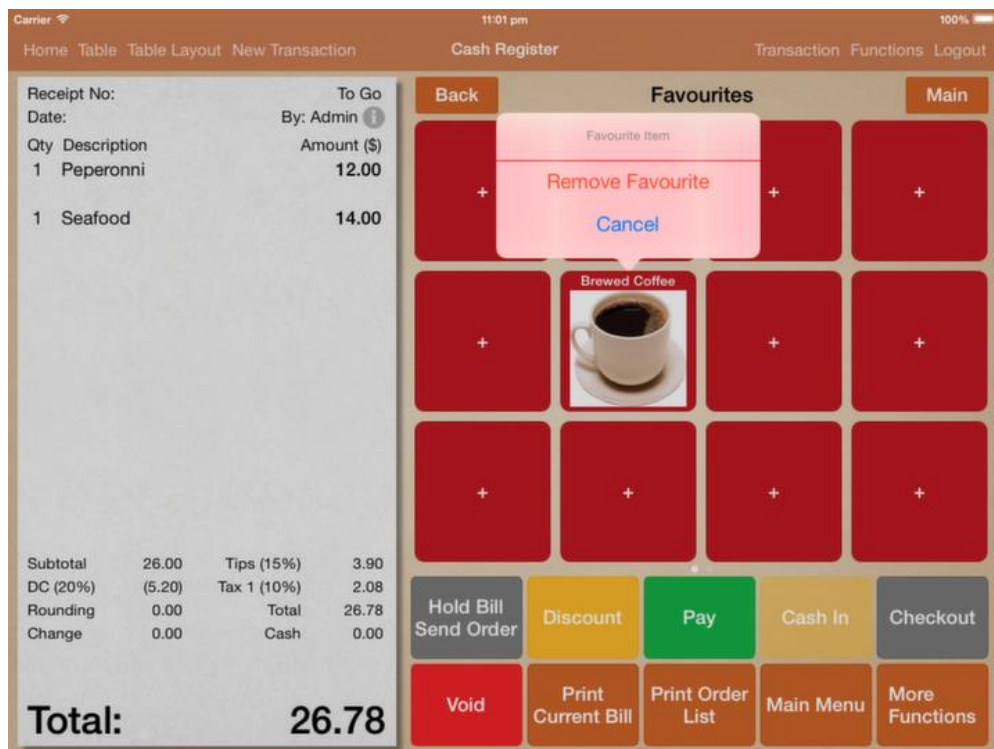
Favourite Item

Favourite can be setup for easier access.
To add an item to favourite, simply by tapping the "+" button and select the item.
To remove, click and hold on the item until the pop up appears.

Merge Bill

Merge bill is simply transferring a bill item to another bill.
All item in bill 1 will be transferred to bill 2 and bill 1 will be deleted.
Works only for takeaway bill.
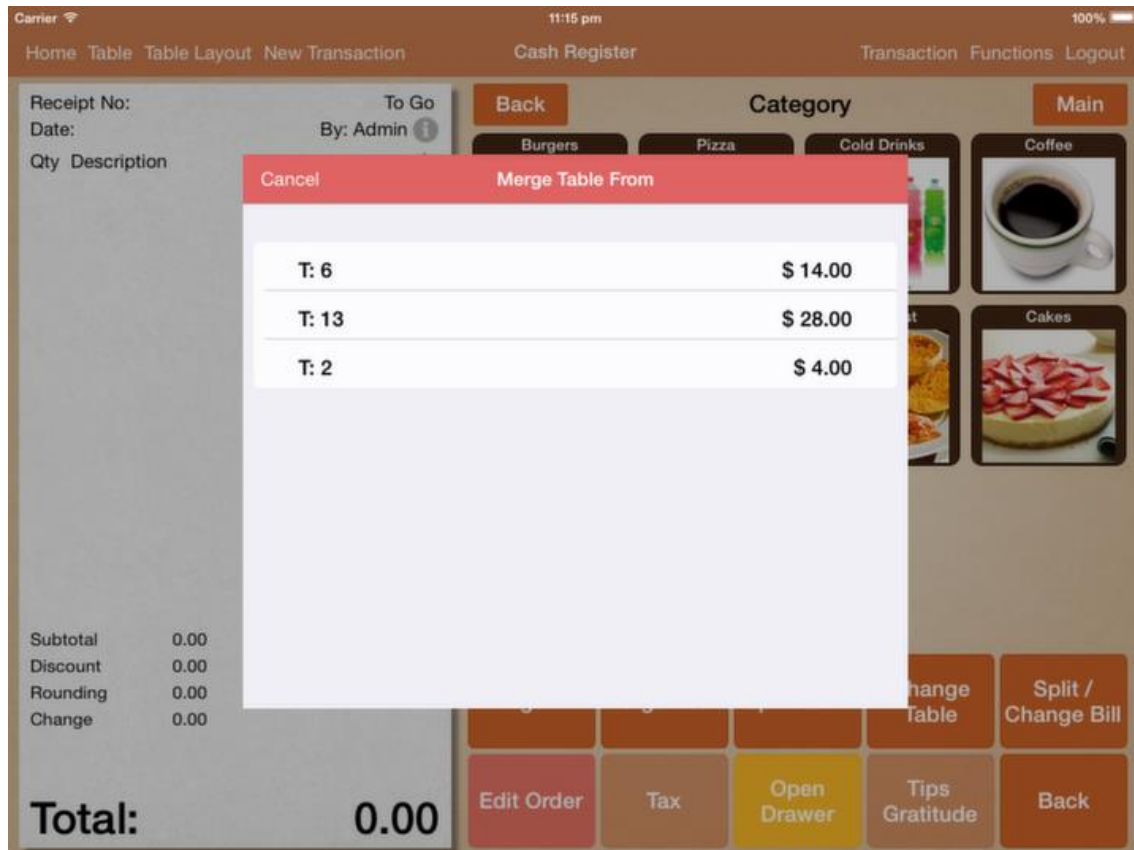
Merge Table

Merge table works the same as merge bill, however it works for dine in bill only.
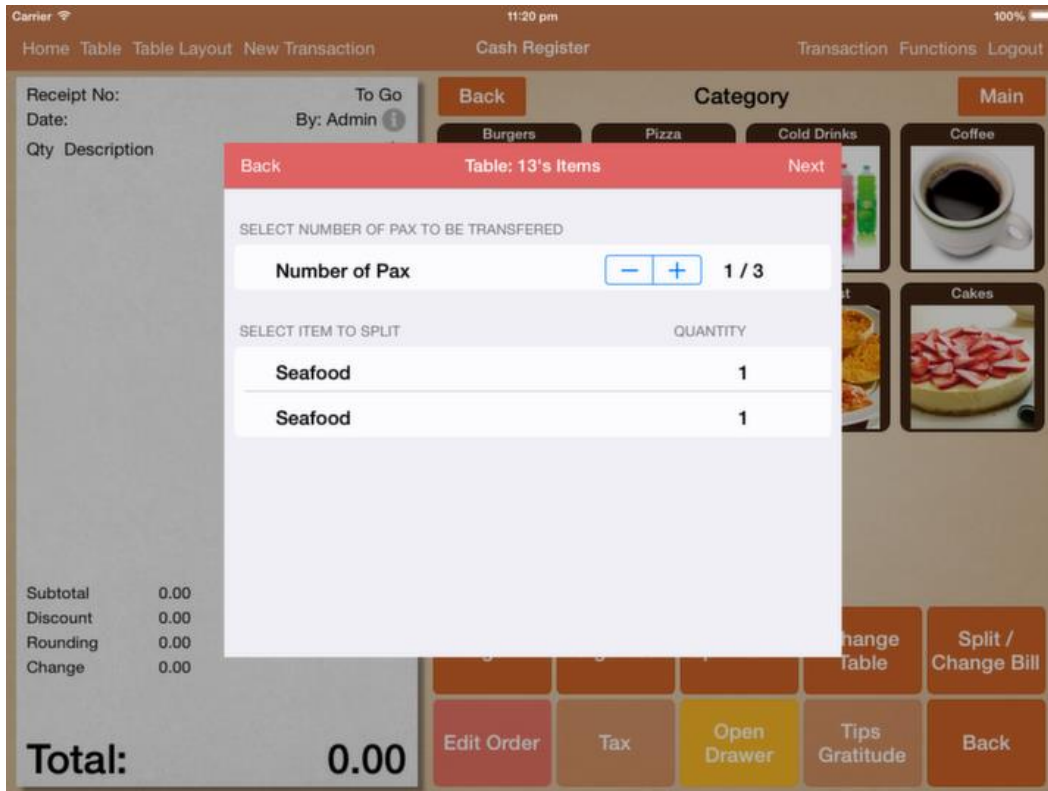
Split Table

Split table is to transfer some of the item to another table.
You could transfer the item to the same table again, so that you have 2 unpaid bills under the same table.
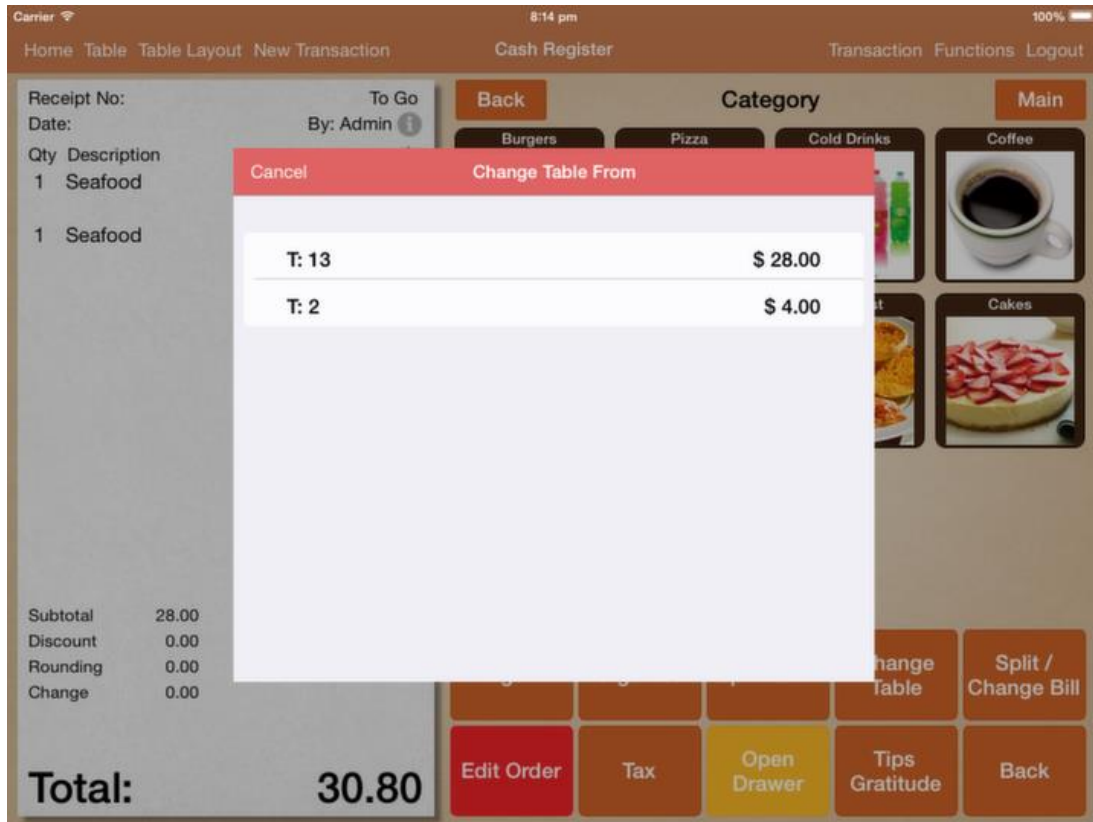
Change Table

Change table simply transfer all item from Table A to Table B by leaving Table A unoccupied and Table B occupied.
It has the option to notify the kitchen about the table change.
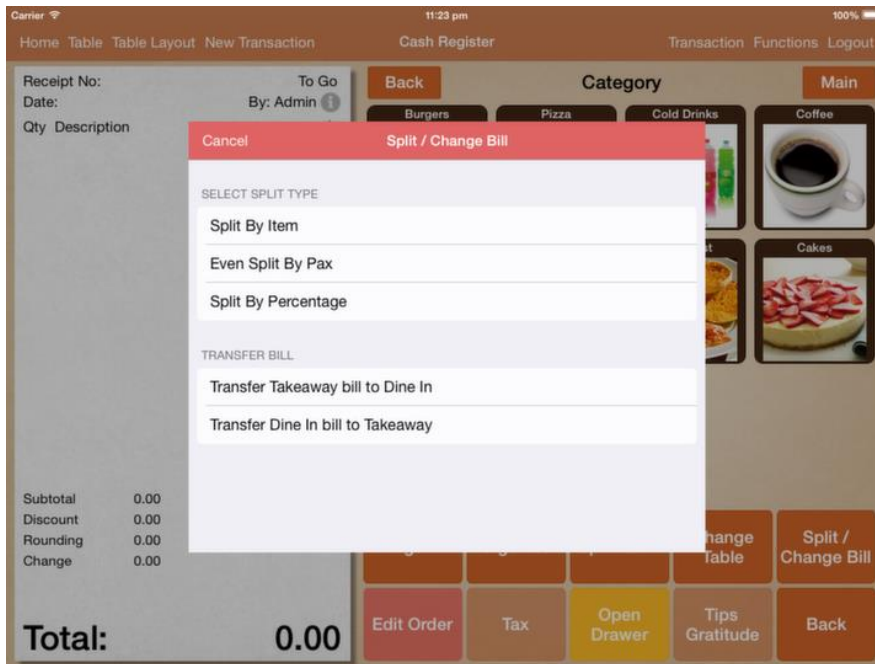
Split/Change Bill

Split by Item

Works the same as split table, except it works for takeaway bill as well.
Choose which order to be split to the new bill.

Even Split by Pax

By choosing the number of pax to split, GeniusPOS automatically calculate the split amount for each pax.
By splitting to 2 pax, transaction #000001 will split to #000001-1 and #000001-2.
Once a bill is split, no additional orders can be taken.

Split by Percentage

Split by percentage works the same as even split by pax, the only difference is that you could specify the percentage for each pax.

Undo Split by Percentage

If you have entered the wrong amount to split, you could undo it.
Just retrieve one of the split transaction and click on "Void".
Click "Yes" to revert splitting the bill.

Transfer Takeaway bill to Dine In

If a bill has been hold without assigning a table, you could transfer the takeaway bill to dine in table.
If orders in the bill has price difference in dine in and takeaway, order's pricing will change.

Transfer Dine In bill to Takeaway

Transfer a dine in bill to takeaway bill.
If orders in the bill has price difference in dine in and takeaway, order's pricing will change.

Table Layout[(Back to Content)](#)
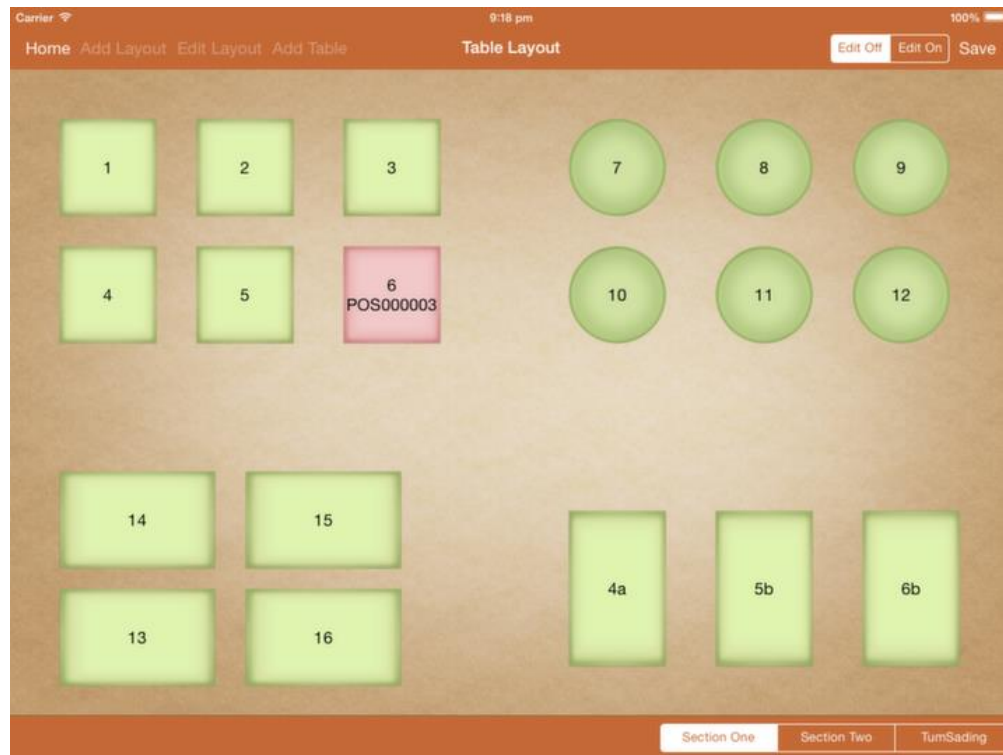
Selecting Table

Double tap on a green table to begin a sale.

View Table Bill

Single tap on red table and click on "View Bill" to view the bill.
You could change the pax number by clicking the + and - sign.

Table Layout

Swipe left or right to move between layout.
Click on table layout name below for quicker access.

Add Layout

You could add up to 8 layouts. Layout size is fixed for each.

Edit Layout

Edit layout to delete or arrange them.

Add Table

Table can be in square or circular shape. 5 different sizes for each.
In edit mode, hold and drag the table to move table position.
Table will automatically aligned to grid.

Report(Back to Content)

Report

Report generated is based on operating hours configured under restaurant settings.
If report is showing less than your sales, make sure the start time is before your first transaction and the end time should be later than your last transaction.

Mail Report

You could mail your report in PDF or excel format.
Report in excel format must be opened with Microsoft Excel.
To open it using Apple Numbers, you need to use PDF convertor to change it to readable format.

Print Report

Report will be printed to cashier printer.
Only the first day of the report will be printed if multiple days are generated.

Consolidated Report

If switched on, multiple days or months report will be consolidated into one report.

Shift Settings

Configure your shift lets you generate report based on your shift.

Customer[(Back to Content)](#)

Customer

Fill up necessary details to add a customer.
Assign customer to receipt so you could track customer spending, give rewards or use account balance to close a bill.

Account Credit Balance

If customer decided to pay with their account credit, balance will be deducted.
Click on the "info" button beside the credit balance to view customer top up records.
With sufficient permission, you could modify the credit balance without topping up.

Automated Reward

States the reward points balance. Setup Rewards/Loyalty to reward customer.

Address Search

Type in the streets name to lookup customer address easily. Address search requires internet connection.

Use Customer

Start a new transaction immediately with selected customer.

Transactions

View all customer's transaction.

Charge Customer

When making a sale, you could charge to the customer credit account. Assign the customer to the receipt, click on "Pay" in cash register, you will see "Charge Customer" button.

Add Category
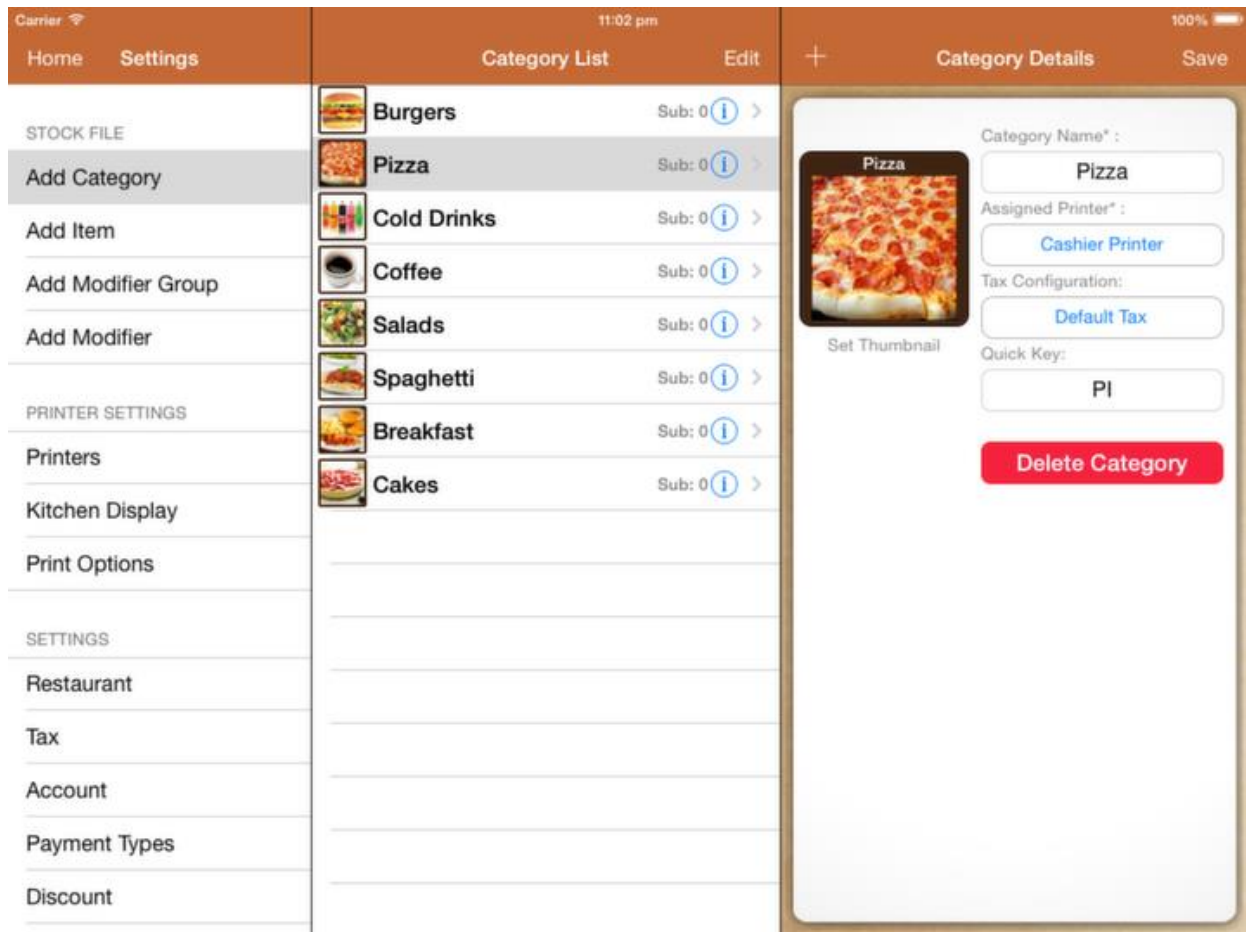
Assigned Printer

This controls the kitchen docket for item under this category.
If the item has no printer assigned, it will follow its parent category assigned printer.
If you do not wish to print the entire category. Set it to *Do no print.

Tax

If you have different tax configuration for different category. You could set them here.
Default tax will apply all taxes that is configured under the tax settings.

Quick Key

Quick key is used in iPhone terminals only.
To use the quick key, you have to setup the quick key under item as well.

Setup "PI" for the category and "01" for the specific item. Then you could tap "PI" then "01" to order.

Moving category position

Beside category list, you will find the "Edit" button.
Click on "Edit", hold and drag the "3 bars icon" in every category to move it around.
Click on "Done" to save.

Add Item

Price & Takeaway price

Default price would be used if takeaway price is set to 0.00.
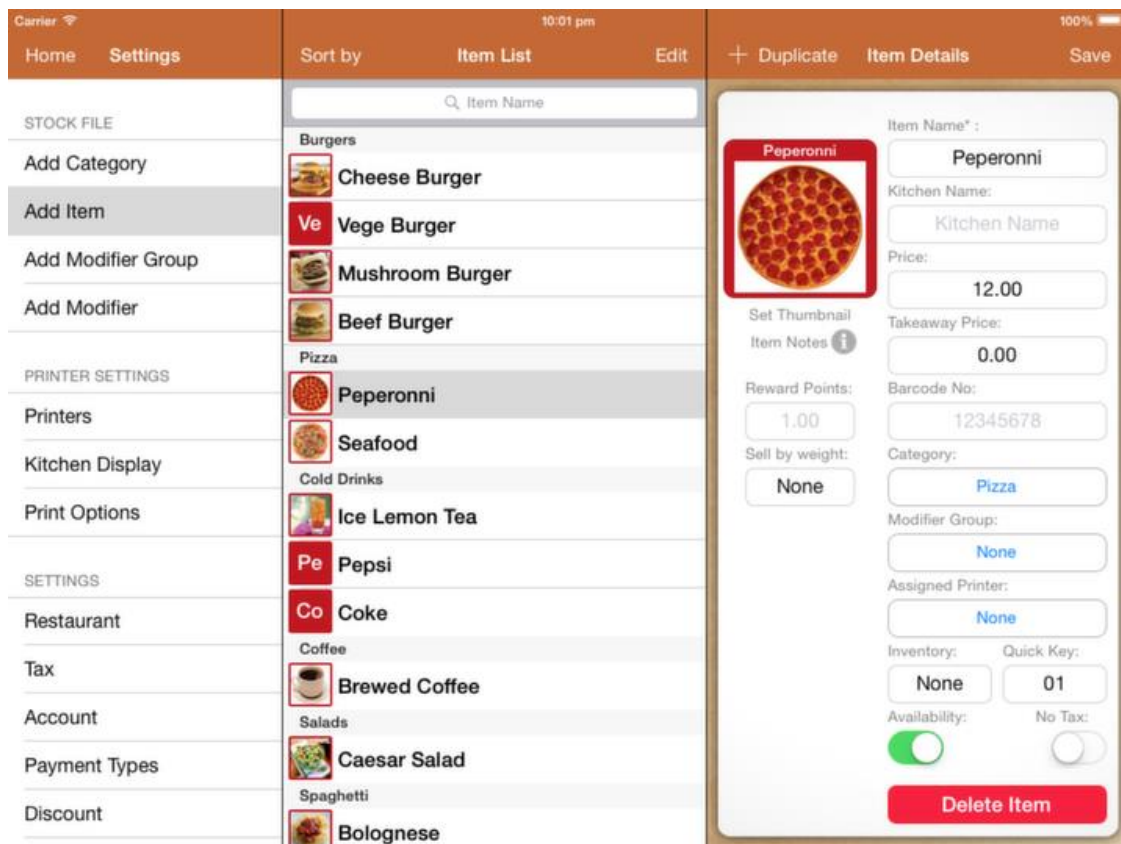If takeaway price is setup, transaction with no table assigned will use the takeaway price.

Barcode

GeniusPOS supports all bluetooth barcode scanner that work with iOS devices.
Enter your barcode and by scanning them will add the item into bill.

Modifier Group

Assign as many modifier group to the item.
Start by creating modifier group under modifier group.
To delete the modifier from the item, swipe across the item's modifier.

Assigned Printer

If no printer is assigned, item follows the settings of its category assigned printer.
If both category and item assigned printer is assigned, item assigned printer will be used.

Inventory

Inventory will be deducted each time an order is sent to the kitchen.
Inventory will be recovered each time an order is void.

Availability

Turn off to disable ordering temporary.

No Tax

Disable this item from charging tax.

Item Notes

Recipe or notes for the item, will be displayed in KDS.

Reward Points

Points rewarded to customer if loyalty is enabled.

Sell by weight

Selling by weight enables price to be calculated by weight.
Before adding the item to bill, system will prompt for weight.

Add Modifier Group
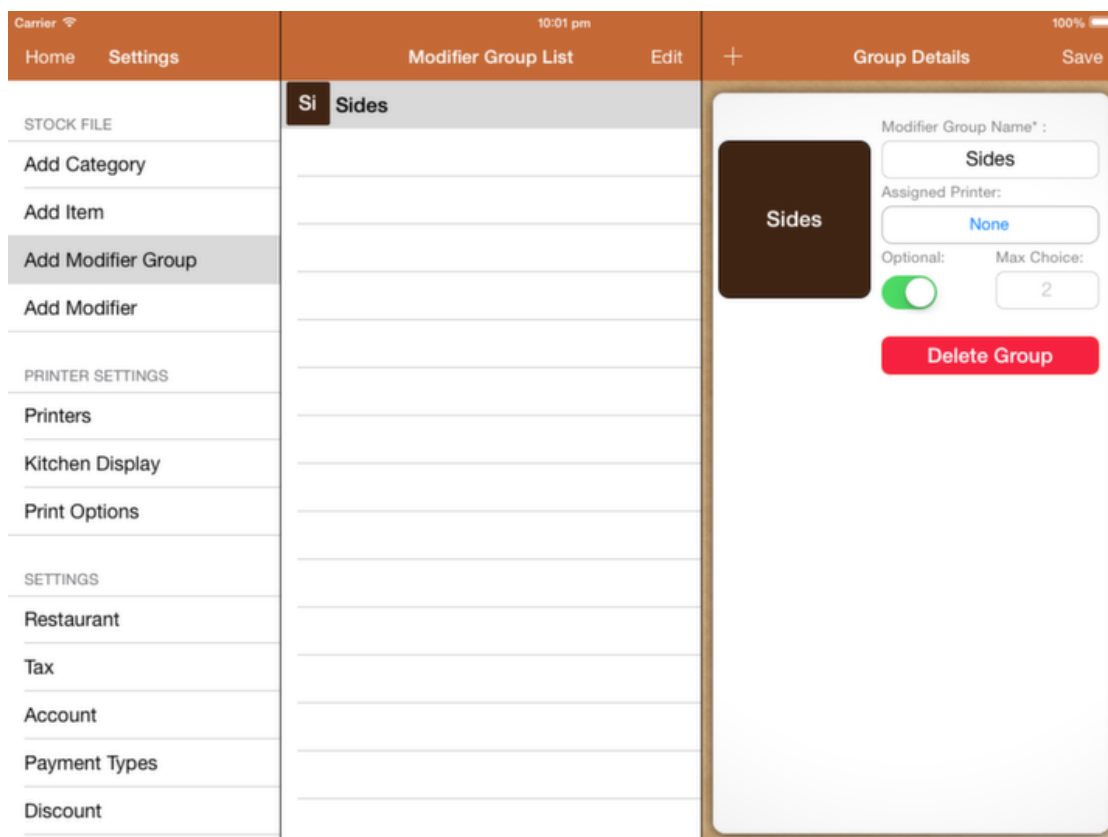
Assigned Printer

If printer is not assigned, modifier follows the parent item assigned printer settings.

Optional

You could set the modifier group to be compulsory or optional.

Max Choice

Limiting the choices for the modifier group. Default will be unlimited.

Add Modifier

Price

Specify additional cost for each modifier.

Assign Modifier Group

Modifier must be under a modifier group.

Printers(Back to Content)

On/Off Switch

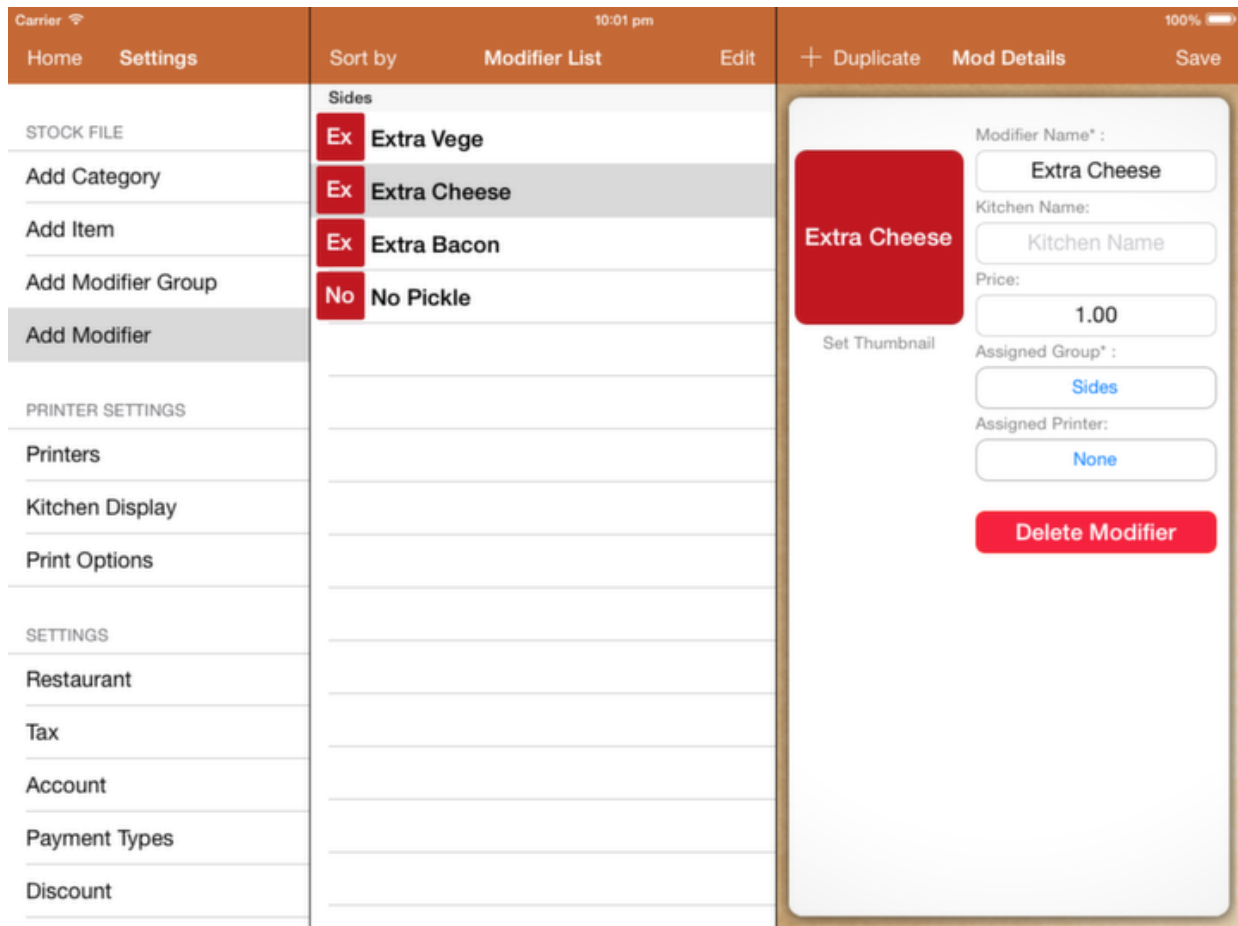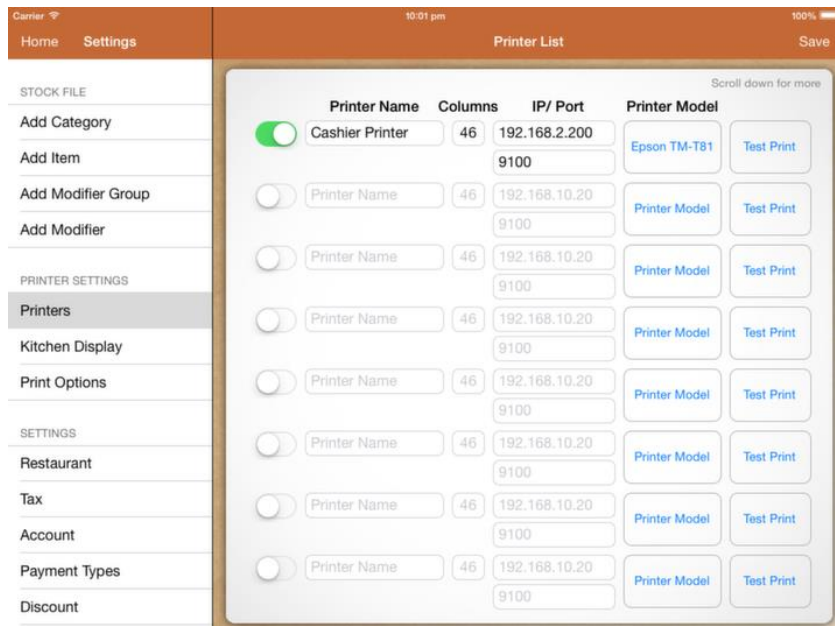Turn off to temporary disable all printings to this printer.

Columns

Every printer has different width and dimension.
Column is the number of character that could be fit into the printing paper.
Reduce column count if characters are overflowing to the next line.

IP Address / Port

Printer IP address should be obtained from printer.
Port number should be 9100 by default.

Printer Model

Select your printer model.
If printer model is not listed, try using Epson TM-T81 as model.
For Star printer, select TSP-100 as model.

Test Print

Test print will print out a sample receipt and pop the drawer.

Print Options[(Back to Content)](#)

Print Options

Print option is divided into 3 categories. General, Bill, Kitchen.

Assign order list printer

Specify the printer for cash register "Print Order List" button.

Assign Printing Language

Do set to the specific printing language if you are printing non english character.
If your printing language is not listed in it, please contact us.

Print receipt logo

Import your logo from your album. Resize accordingly as save.
Logo is printed on top of customer receipt.

Bill[(Back to Content)](#)
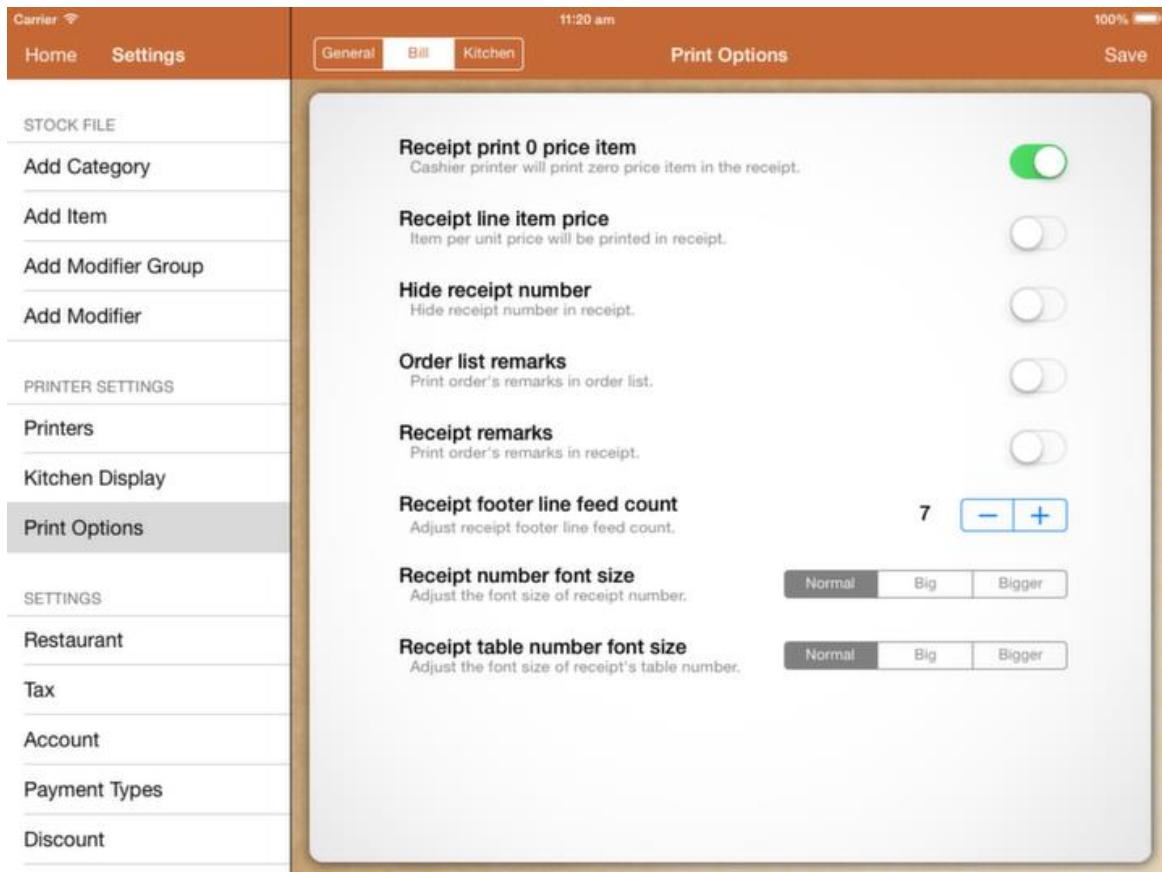
Receipt print 0 price item

If turned on, customer receipt will include zero price item as well.

Receipt line item price

If turned on, each line item price will be printed below the order. Example: "1 @ 3.00"

Hide receipt number

Hide the receipt number printed in customer receipt.

Order list remarks

Enable printing order's remarks in order list.

Receipt remarks

Enable printing order's remarks in customer receipt.

Receipt footer line feed count

Adjust accordingly to make sure the printer cuts at the right position.

Receipt number font size

Adjust the font size of receipt number for customer receipt.

Receipt table number font size

Adjusts the font size of table number for customer receipt.
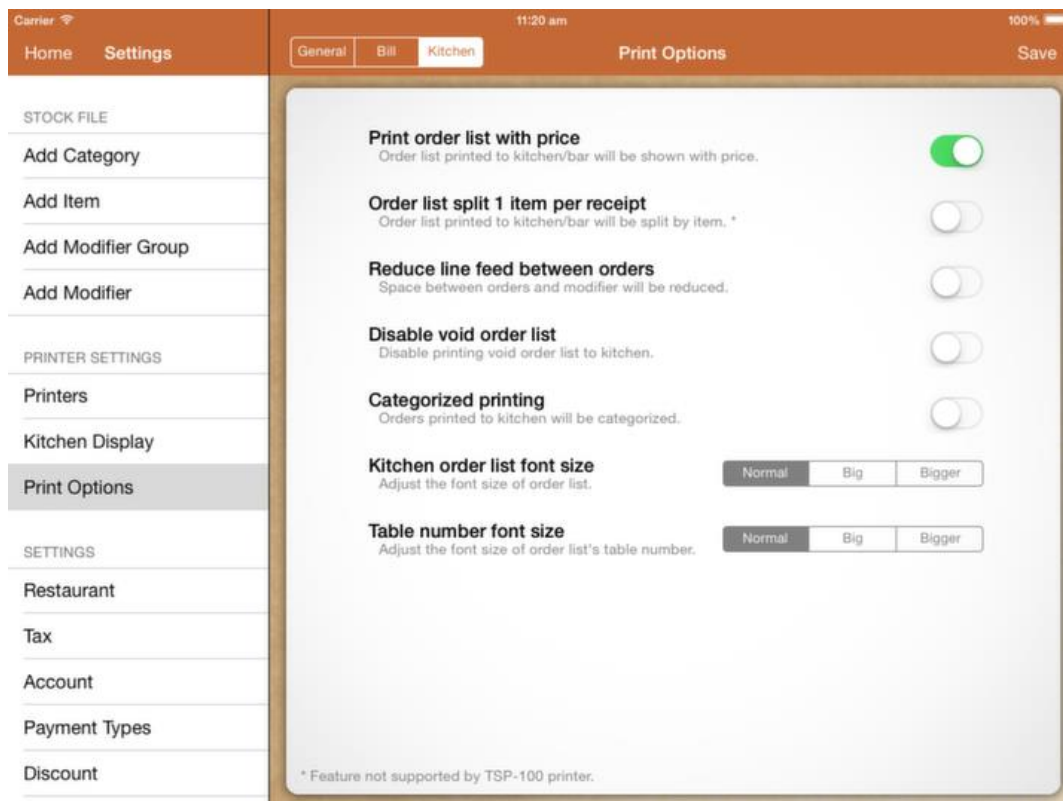
Print order list with price

If turned on, kitchen docket will print price beside each order.

Order list split 1 item per receipt

Each order will split into separate docket. (Not supported for Star TSP-100 printer)

Reduce line feed between orders

The default line feed between each order is 3 lines. Turn on to reduce to 1 line.

Disable void order list

By default, voiding item or bill will print a void kitchen docket. Turn on to disable it.

Categorized printing

Group identical category order together when printing to kitchen.

Kitchen order list font size

Adjust the font size that is printed to the kitchen.

Table number font size

Adjust table number font size that is printed to the kitchen.

* Star TSP-100 printer supports only 2 font size.

Restaurant(Back to Content)
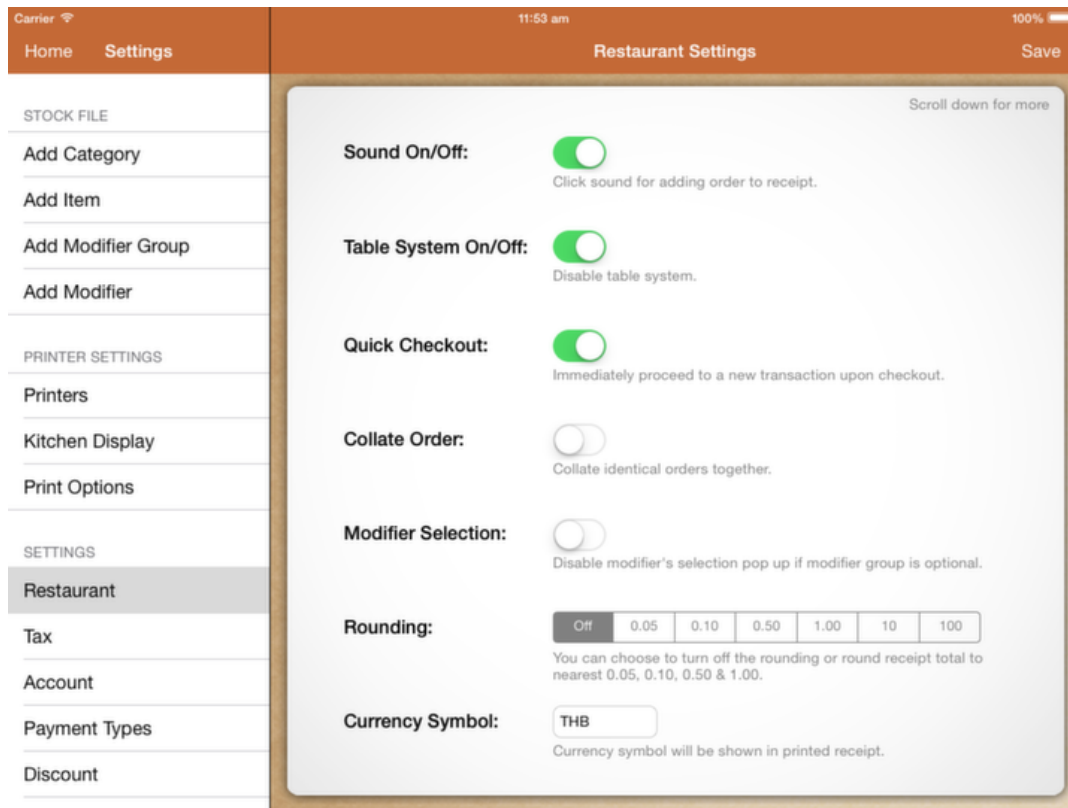
Table System On/Off

Turn off if your setup is for takeaway only.

Quick Checkout

If turned off, receipt details remain in view after checking out.
Require additional step to start to a new transaction.

Collate Order

Collate identical orders together.
Ordering 2 product A will appear 2 X product A instead of 2 line item.
Identical orders will not collate if one of the order has been sent to kitchen.

Modifier Selection

Disable modifier's selection pop up if all modifier group under the item is optional.
To add extra modifier to this order, select the order in receipt and click Edit.

Rounding

Rounding follows the rule of rounding to the nearest.

Currency Symbol

Currency symbol will be printed in customer receipt and appear in each figure in application.

Receipt Prefix

Receipt prefix will append to each receipt number.

Operation Hour

Operation affects report generation.
Set it to cover your entire operation day.

Outlet Name

Outlet name is shown in the email title if email receipt function is used.

Logout Upon Hold

Logout user when user click on "Hold Bill Send Order" button in cash register.

App's Language

Select the language you preferred for application interface.

Refresh Language

Each language that is listed might not be fully translated.
You could help us translate under FAQ. Upon translation, click on "Refresh Language" to retrieve the updated language files.

Tax[(Back to Content)](#)

Tax

Configure up to 5 taxes. Tax will be calculated based on subtotal.

Tax Name

Tax name will be printed in customer receipt.

Tax For

Tax can be configured for All, Eat In or To Go.
If table is assigned to the transaction, it will be considered as Eat In.

With Tax

With Tax works only on second line of tax onwards.
If With Tax is set to Yes, instead of calculating on subtotal, tax will be calculated on subtotal + tax amount before this tax.

Price of product item already include tax
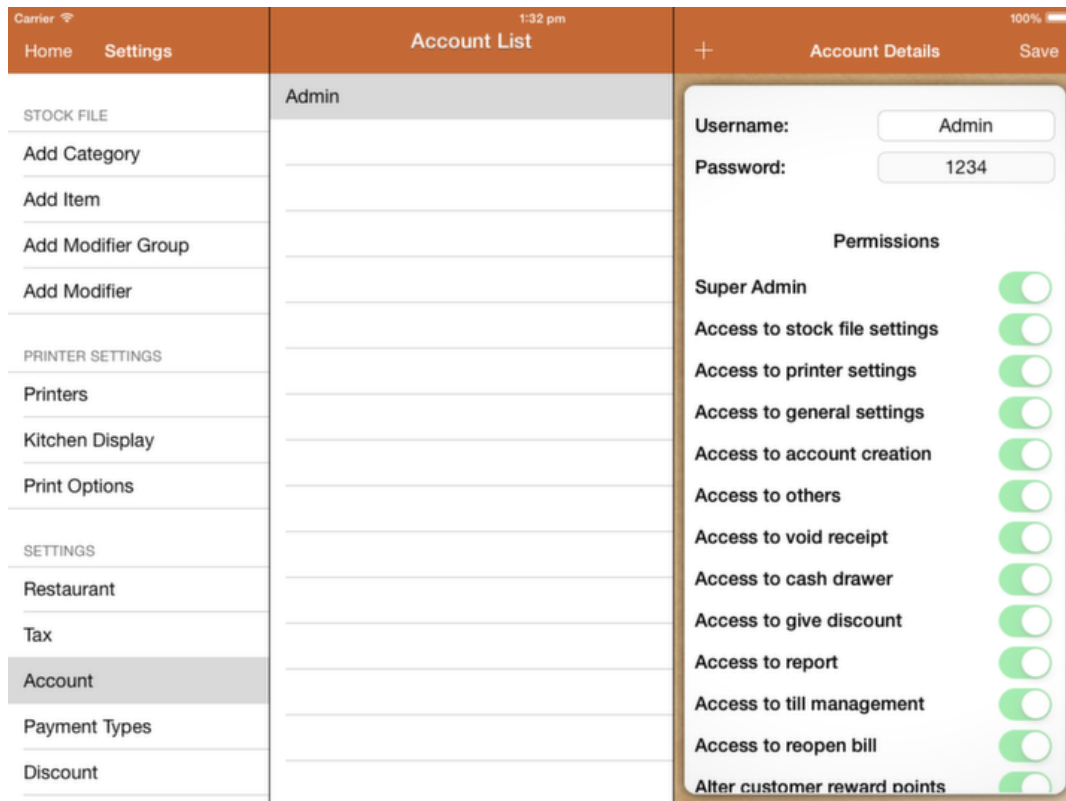
This configuration applies to entire restaurant tax setup.
If it's set to "Additional" or "Reverse", surcharge can be used.
Surcharge is calculated additionally.

Account(Back to Content)

Account

Setup account for each staff you have.
Password must be numerical.
Admin account cannot be deleted.

Permissions

Setup permission for each staff to prevent staff from doing each listed.

Payment Types[(Back to Content)](Back to Content)
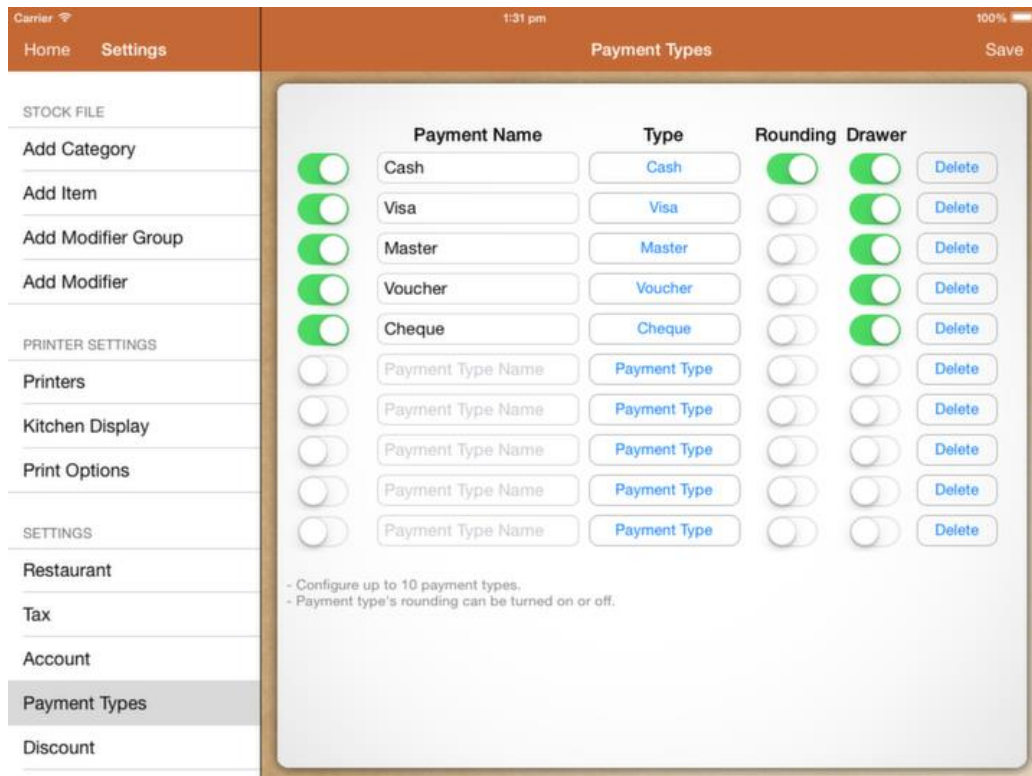
Payment

Configure up to 10 payment types.
If the payment type is deleted or modified, it will affect past report reading.

Type

If the payment is set as "Cash", payment closed with this payment will affect the till balance.

Rounding

Rounding can be switched on or off for each individual payment.
If rounding is switched on, it will follow the rounding setting under restaurant setting.

Drawer

Drawer will pop depending on which payment type is used to close the bill.
Switch on to pop the drawer.

Discount

Discount

Discount type can be set by percentage or by price.
Discount will appear in both bill and item discount.
Discount report will show the discount given for each discount setup.

Button Layout
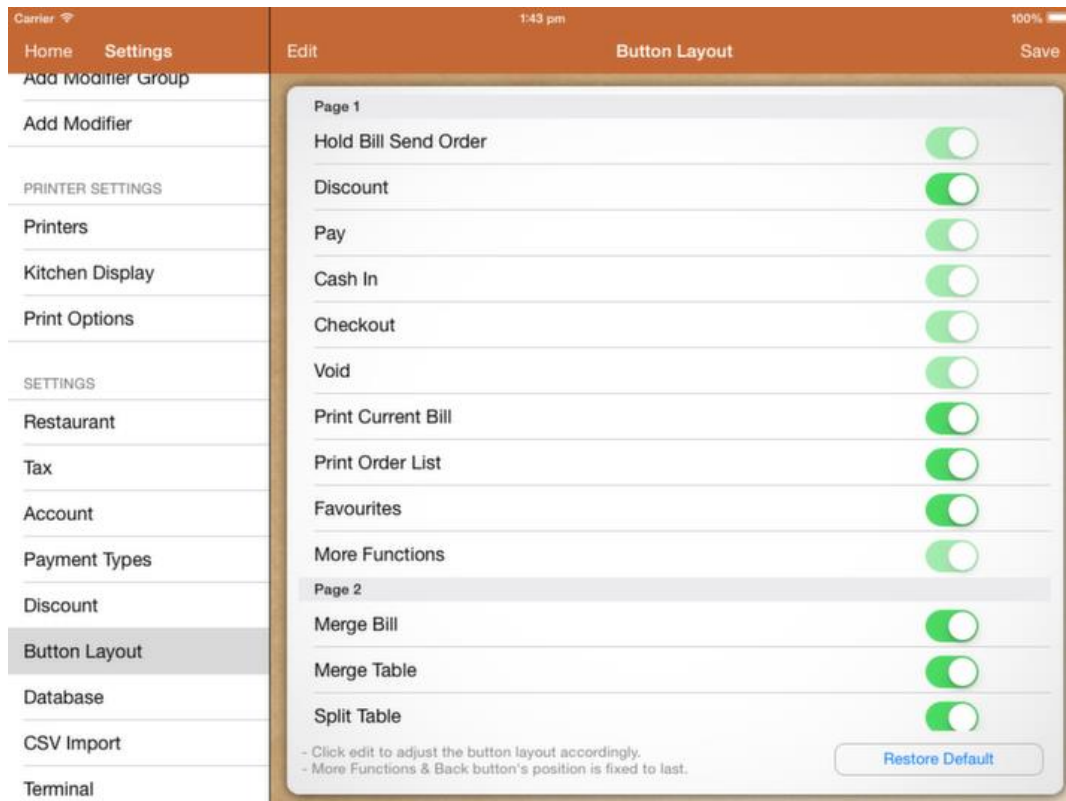
Button Layout

You can arrange each button to your favourite position for easier access.
You could disable the function button if it is not needed.

Rearrange button Layout

Click on "Edit" button on left top.
Drag and hold the "3 bars icon" beside each row to move them around.
Each layout must have 10 buttons.

Database[(Back to Content)](Back to Content)
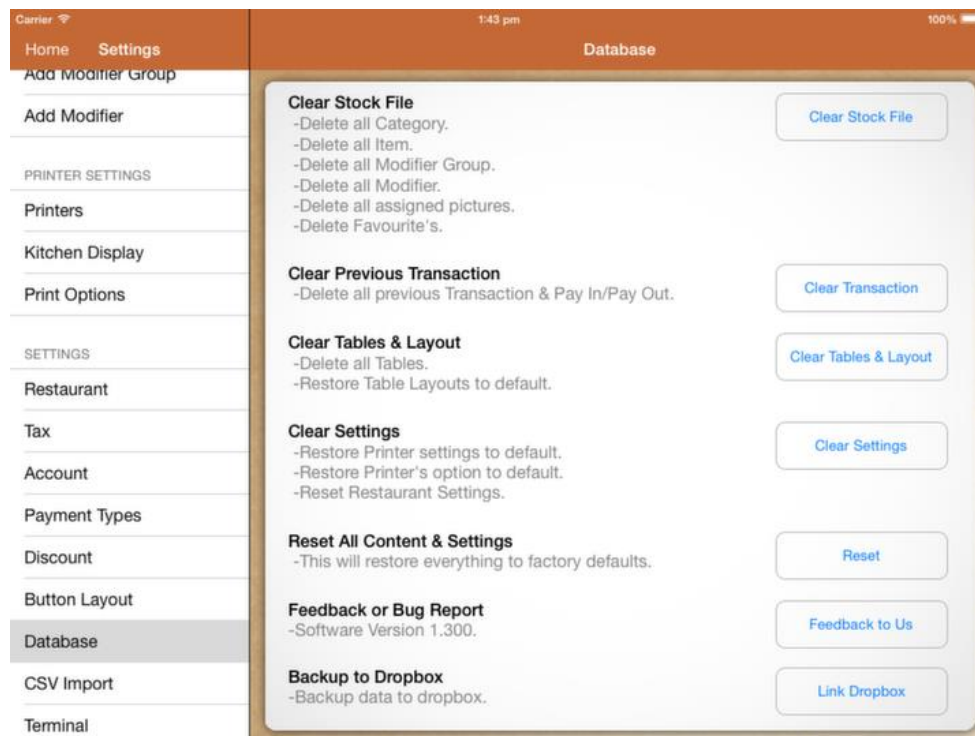
Clear Stock File

Clear stock file delete listed.
Use this only if you are setting up a new restaurant.

Clear Previous Transaction

If the application starts to slow down after a long usage.
You could clear all previous transaction.
This will delete all your previous report and reset transaction back to #000001.
You should backup your database before doing this.

Feedback or Bug Report

Suggestions are welcomed.
If you face any issue with the application, you could send us your log.
Your log contains all information about your application current state.

Backup to Dropbox

If you sign in with your dropbox account, it will backup your database and pictures to
Dropbox automatically.

CSV Import
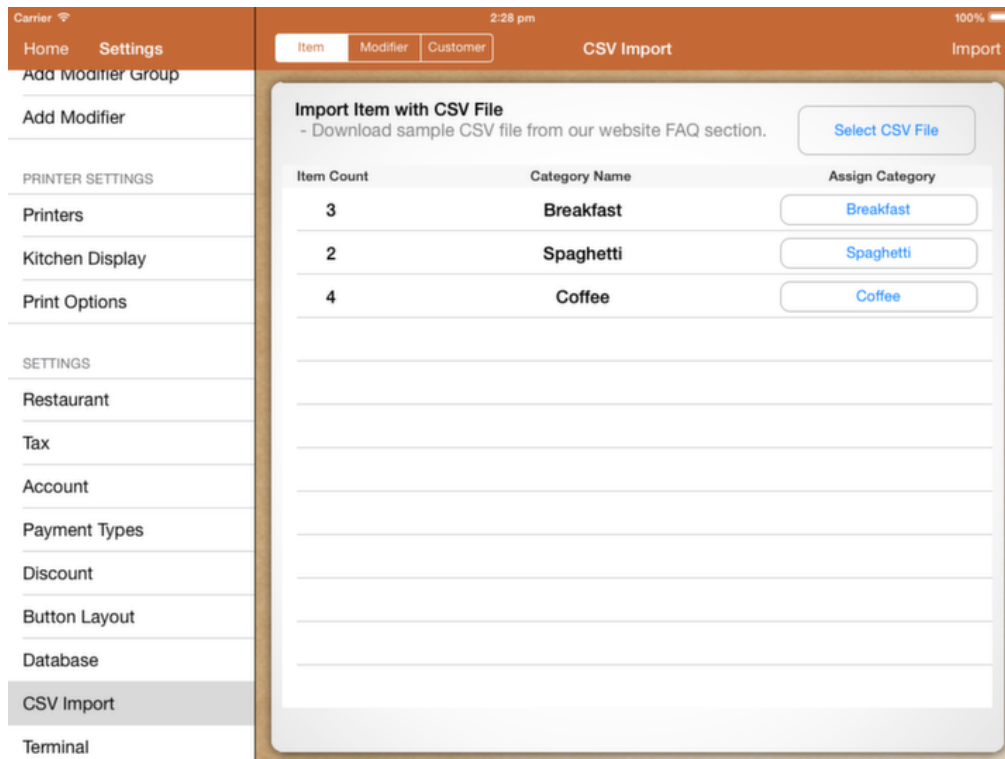
CSV Import

You can import item, modifier and customer into Geniuspos.
Download the sample file and modify them.

Item CSV

Modifier CSV

Customer CSV

Importing CSV file
After creating your csv file, you need to upload the file into GeniusPos document folder.
You can learn how to do it by following this guide.

Importing Item

Before importing item, make sure you have created all the categories needed by the item.
Upon selection of csv file, assign each category and import them.

If your application crash, make sure your csv file is identical with the sample csv file.
Open them with notepad and check the number of comma in each line.

Terminal
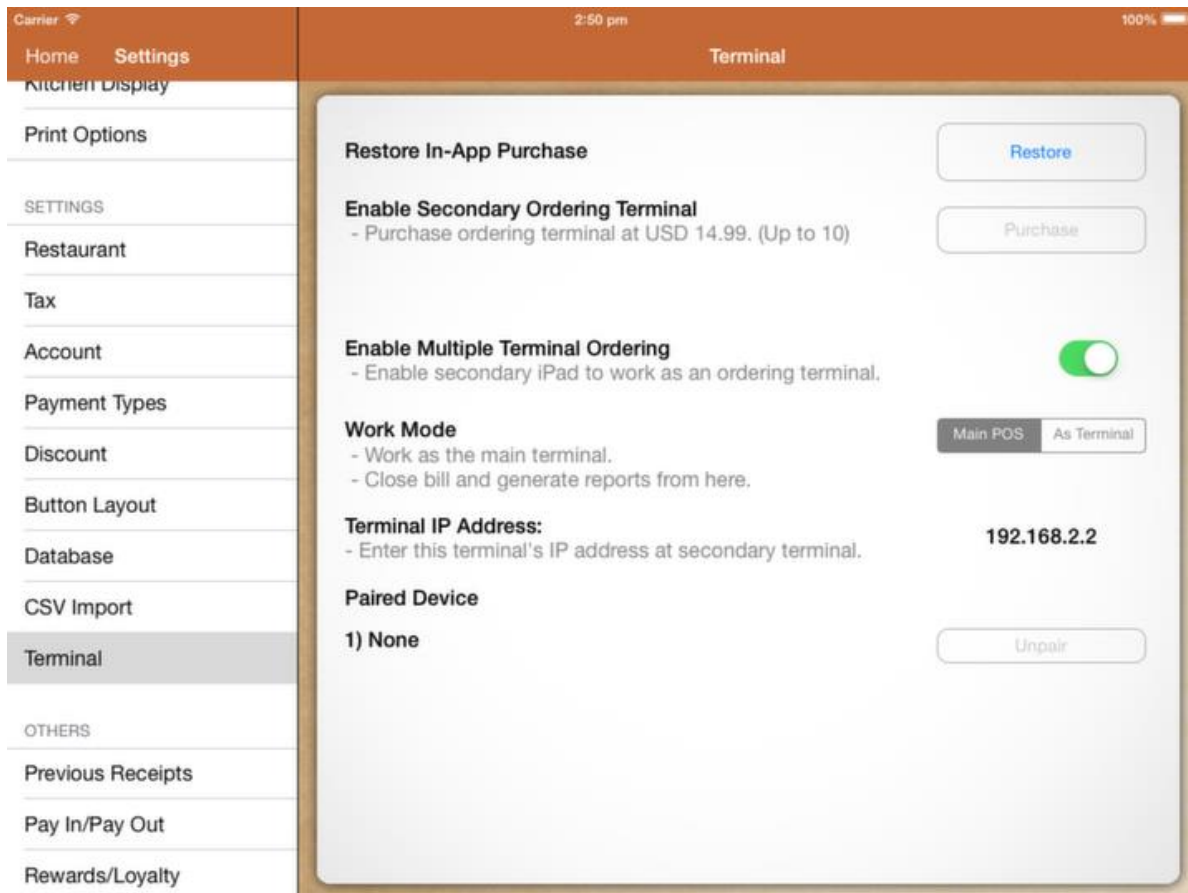
Enable secondary ordering terminal

You have to purchase at least 1 slot to enable secondary ordering terminal. Upon purchase, switch on "Enable Secondary Ordering Terminal".

Work Mode

For the primary device where you store all your stock files and settings, set it as "Main Pos".
You can use iPhone terminal or iPad terminal to serve as terminal.
Refer to Terminal Setup for more information on instructions on setting up secondary terminal.

Previous Receipt

Previous Receipt

Previous Receipt

You could find all your closed receipt here by days.
You could do a search by receipt number or customer name.

Reprint Bill

Option to reprint or email the bill.
Reprinted bill will be shown in the bill printed.

Open, Void or Refund Bill

Click on "Edit" button on top.
You could reopen the bill. Reopening the bill will remove the payment for the bill.
Upon reopen, you will find the bill in cash register again.
Void the bill to remove it's sales from report.
Click on refund and select items to refund your customer. br>

Pay In/Pay Out

Pay In/Pay Out

Pay In/Pay Out let you manage your cash that deposited or removed from the cash drawer.
Use a negative value for cashing out.

Rewards/Loyalty [(Back to Content)](#)
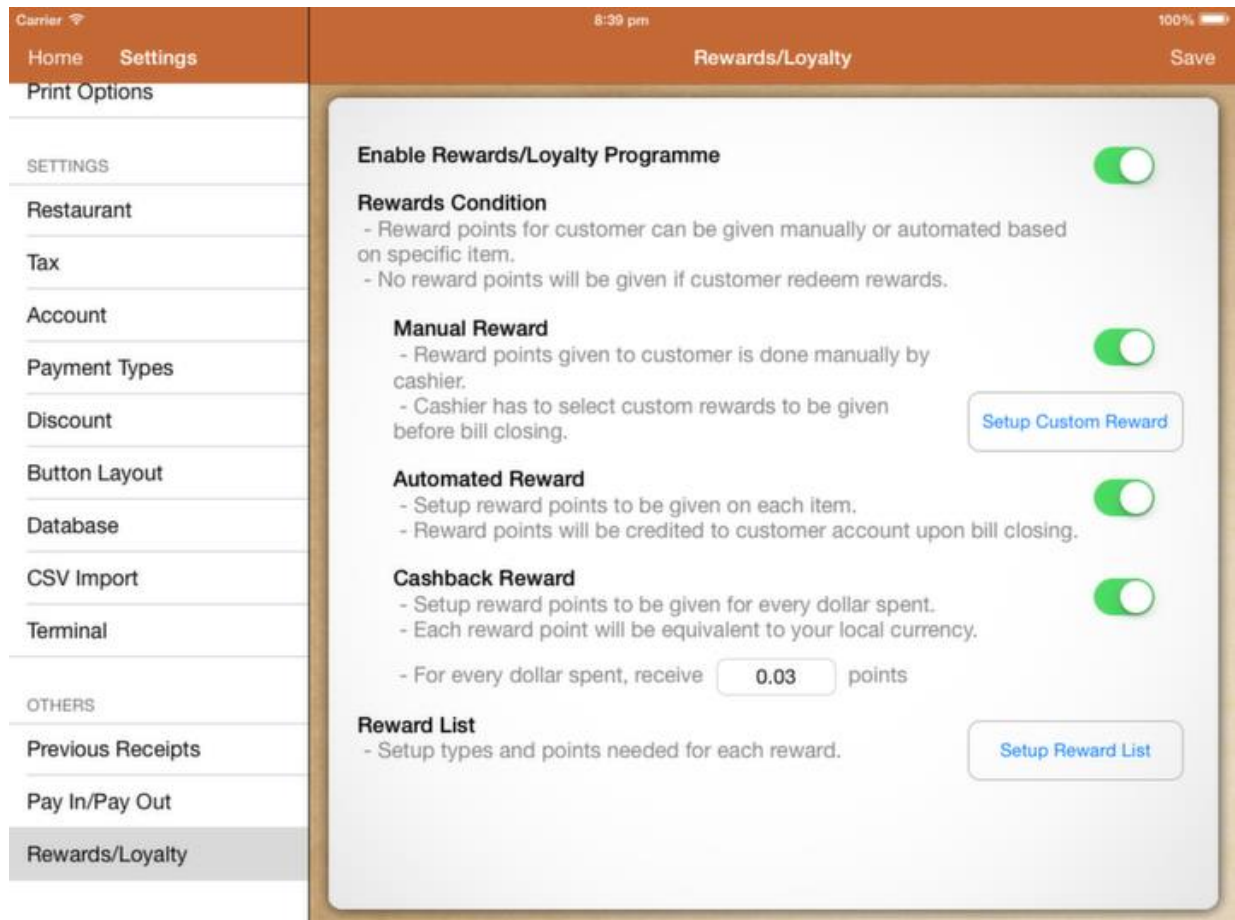
Rewards

In order to reward customer, a customer account must be assigned to the receipt.
Customer reward or redemption is made upon payment.

Manual Reward

Setup custom reward to reward your customer.
Your cashier has to decide the condition upon billing for manual reward.

Automated Reward

Number of points to be rewarded must be setup at each item.

Cashback Reward

Customer receives point for each dollar they spent.
Points received will be equivalent to your local currency.

Reward List

Reward list act like a discount.
Setup points required for each rewards.

Use Case

Case 2 (Manual Reward)

If you are running a promotion under certain special condition, use manual reward.
Example 1, free a cup of coffee for spending above $50.
Reward point given can be 10 points and under reward list, set 10 points is needed to redeem a coffee.

Case 2 (Automated Reward)

If you are running a promotion, for each 10 coffees purchased get 1 free.
You could setup coffee to give automated reward of 1 point for each coffee they purchase.
In the reward list, specify the points needed which is 10 points to redeem a free coffee.
The reward can be a $2 discount which is the price of the coffee.

Case 3 (Cashback Reward)

If points are given upon spending, setup cash back reward.
Each point earned can be used to deduct the total bill amount.

Terminal Functionality

Terminal may function differently from the primary POS.
Terminal may have lesser features as compared to primary POS.
For function that is not available in terminal, you have to do it in the primary POS.
Refer to Features section for more info.

Terminal FAQ

* Each device paired, will take up a slot in the primary POS.
* Primary POS iPad screen must be turned on, else terminal would not be able to send order.
* You can't change settings in your terminal, all item setup or setting changes must be made in primary POS.
* Changes made in primary POS will not reflect in all terminals until they synchronize again.
* Orders can't be sent if primary POS is using the same bill. "Table in used" error will show.
* For unstable connectivity, try restarting iPad's wifi or the network router.

Ipad Terminal Setup

Secondary Terminal (iPad)

To have a secondary ordering terminal, you need to have another iPad.

1) Download Genius Pos
2) Upon completion, head on to Settings -> Terminal.
3) After enabling "Multiple Terminal Ordering", choose "Terminal" as the work mode.
4) In "Main Terminal IP Address", enter the IP address found in your primary POS terminal settings page.
5) Click on "Pair/Synchronize DB".

If this is the first synchronization, there will be a pop up in your primary POS. Asking you to pair this device. Click "Yes" to pair.
Now in your secondary terminal, click on "Pair/Synchronize DB" again.
It should proceed to retrieve all settings & pictures.

Upon completion, click on "Home", and go to "Cash Register".

Punch in a few orders, click on "Hold Bill/Send Order", the orders will be sent to the primary POS.
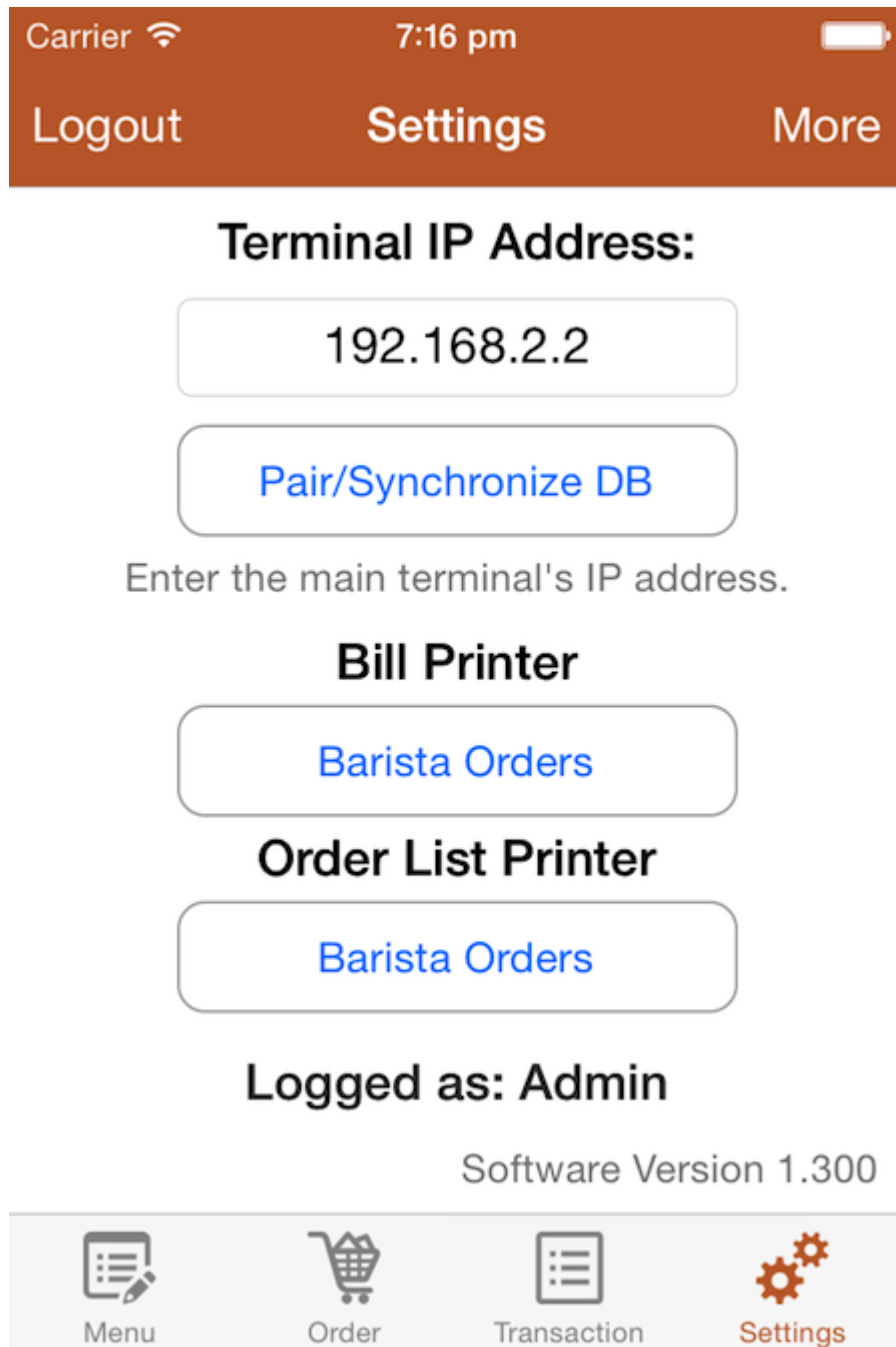
Proceed to a new transaction upon order sending

Upon sending orders to the kitchen, terminal will automatically start a new transaction.

Enable payment on terminal

You have the option to enable terminal to close bill as well.

Iphone/ipod Terminal Setup[(Back to Content)](#)

Secondary Terminal (iPhone/iPod)

To have a secondary ordering terminal, you need to have an iPhone/iPod Touch.

1) Download Genius Pos Terminal
2) Upon completion, head on to Settings.

3) Under Terminal IP Address, enter the IP address found in your primary POS terminal settings page.
4) Click on "Pair/Synchronize DB".

If this is the first synchronization, there will be a pop up in your primary POS.
Asking you to pair this device. Click "Yes" to pair.
Now in your iPhone terminal, click on "Pair/Synchronize DB" again.
It should proceed to retrieve all settings & pictures.

Upon completion, go under "Menu".
Punch in a few orders, then under "Order" click on "Send Order", the orders will be sent to the primary POS.

Backup/Restore(Back to Content)

You could backup your application files via Dropbox.
However this will guide you on how to do a manual backup and restore.

Backup

To do a manual backup, you have to plug your iPad into your PC and open up iTunes.
Without the usual synchronization, you should find your iPad connected and your iPad can be located at the top right.
Click on "iPad".
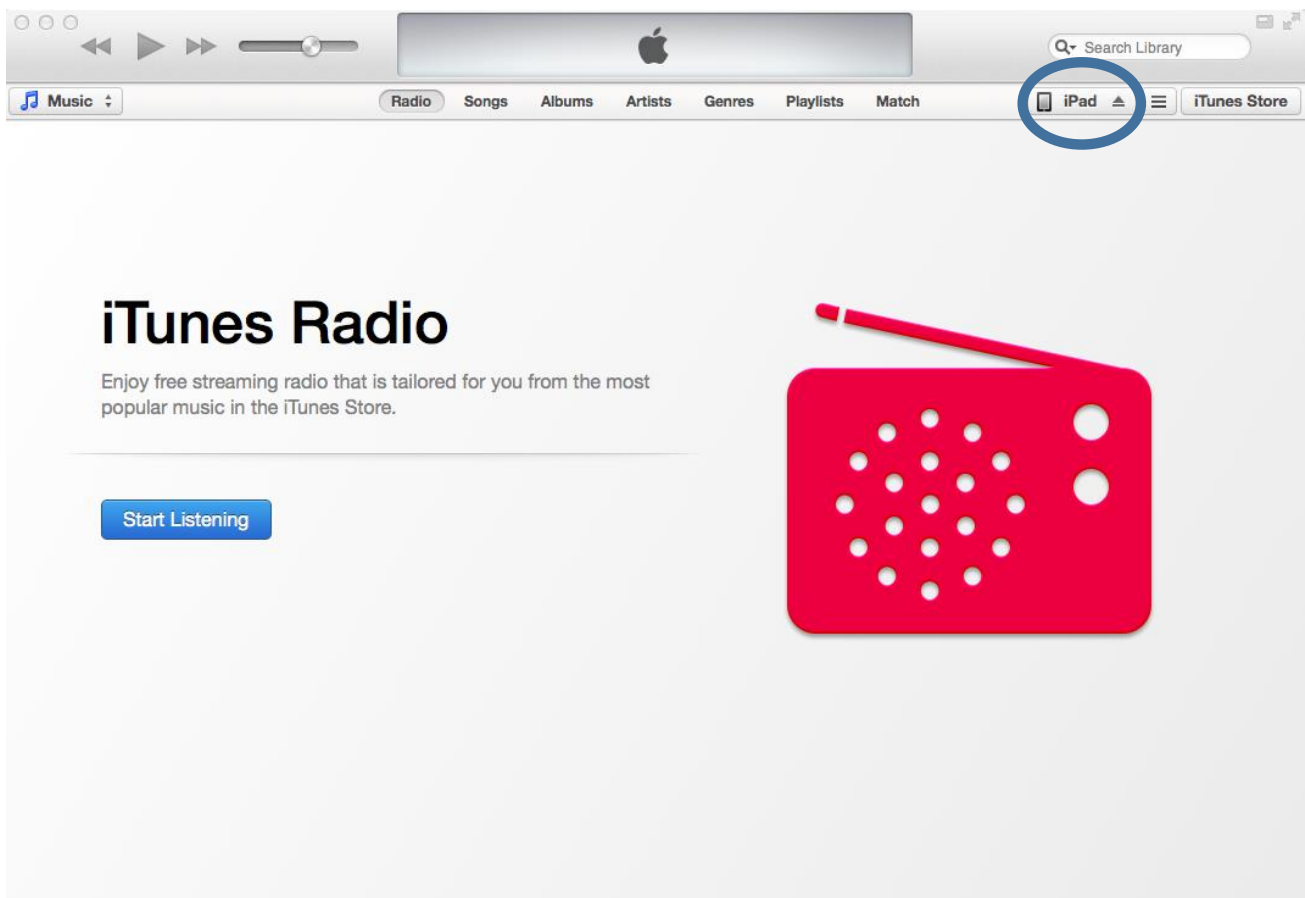
Upon clicking on "iPad", you should find your iPad device information.
On top, you will find "Summary", "Info" and "Apps".
Click on "Apps".

After clicking on "Apps".
Scroll down to the bottom, you should find GeniusPOS application in "File Sharing".
Click on "GeniusPOS", you will find its documents on the right.
In the documents folder, there are 2 important files to backup.
Click on the "GeniusPOS.db" and save to your desktop.
Then click on the "Images" folder and save to your desktop as well.
You could also hold and drag the files out from the window to your desktop.
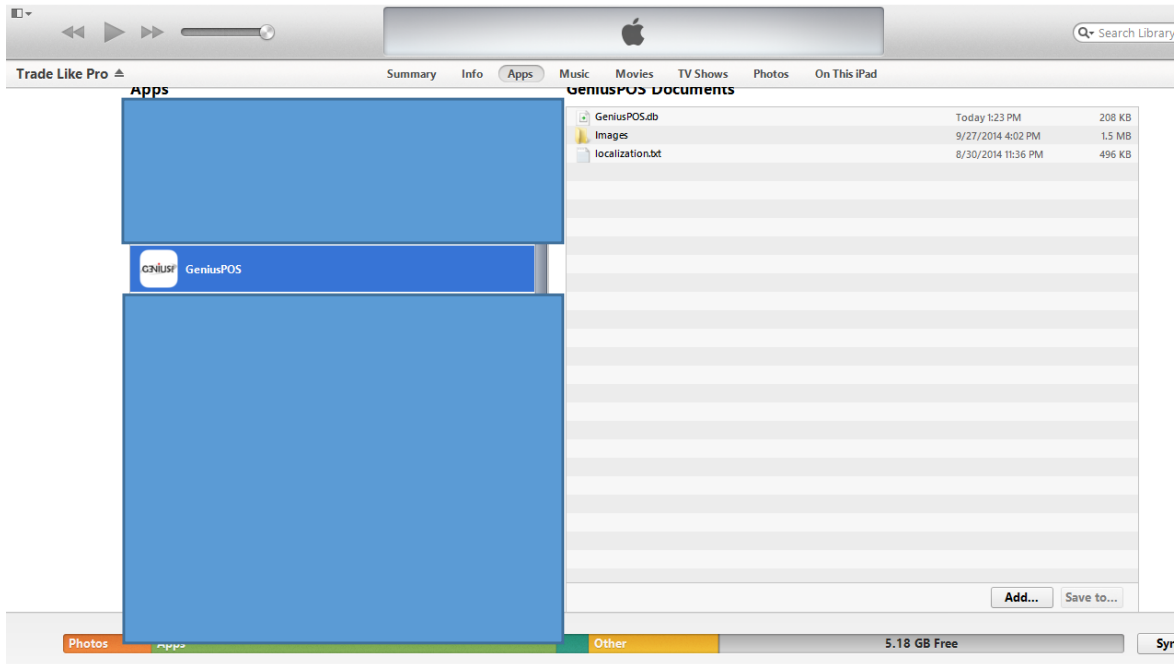
Restore

To restore the database, you need to make sure your backup file name is GeniusPOS.db
Follow the backup steps above until you find GeniusPOS documents folder.
Click on "Add...", find and select your backup GeniusPOS.db file.
It will prompt you if you want to replace the original GeniusPOS.db in the application.
By clicking yes, it will remove what's in your iPad and replace with your backup.
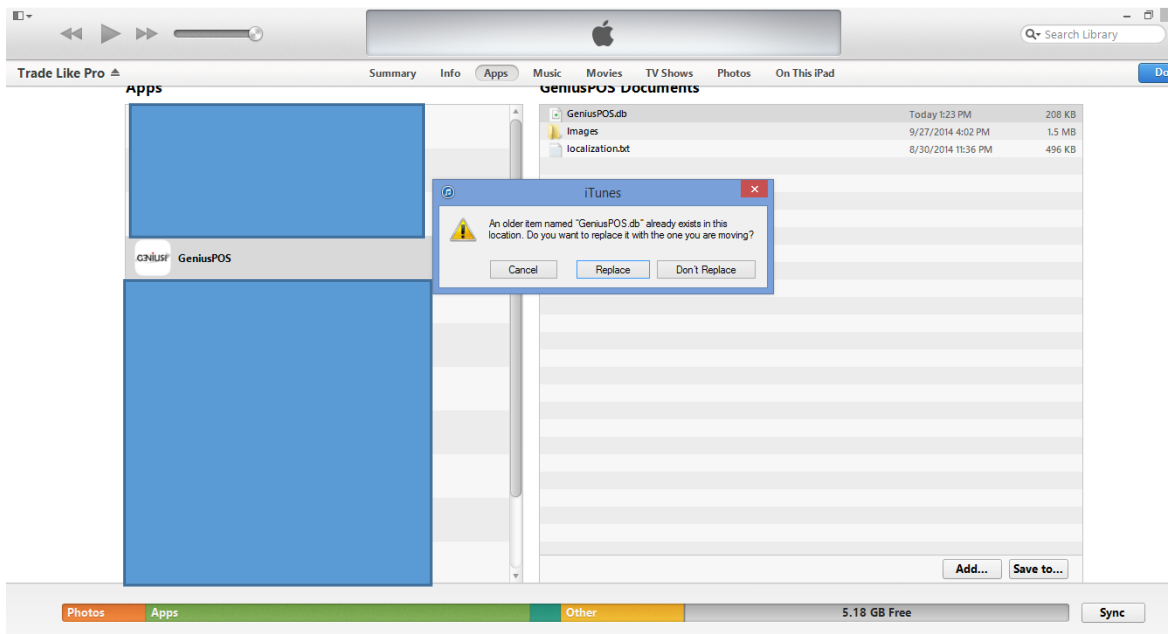
Now you can restart your application.
The changes will be reflected and all the images will be transferred into Images folder.