LS EASY RETAIL

LS Easy Retail 1.0

User Manual

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Contents

1 Introduction

This manual contains information for users of LS Easy Retail.

LS Easy Retail is a scaled down version of LS Retail 4.10 suitable for small stores with a limited number of POS.

LS Easy Retail is different from LS Retail in the sense that it groups Microsoft Navision modules such as Finance, Inventory, Purchasing and Sales as well as the retail modules in one application. This is different from LS Retail where Microsoft Navision granules are configured independent of the LS Retail application. The retail part of LS Easy Retail has also been streamlined for smaller retailers, significantly reducing the time spent on initial setup and configuration.

LS Easy Retail is therefore ready to run out of the box, a complete solution that contains everything a small retailer needs to operate a store. The functionality provided by LS Easy Retail is also supplied at a significantly lower price compared to LS Retail and Microsoft Dynamics NAV. On the other hand, LS Easy Retail does not contain the same level of flexibility as LS Retail since it is not possible to add additional Microsoft Dynamics NAV granules to the system or modify it in any way.

The contents of this manual are in the form of practical use-cases that guide the user through various retail tasks and processes involving LS Easy Retail. The material in this user manual is also accessible in the Online Help under Use Cases.

Press F1 on your keyboard for help regarding individual fields.

Note: This User Manual is partly created from LS Retail help material and may therefore contain reference to more advanced functionality.

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2 Wizards

LS Easy Retail includes a number of wizards that assist with the setup and configuration of the application. The wizards can be divided into the following categories:

- **Setup and Configuration.** Assists with tasks such as basic accounting setup, imports of master data and the creation of stores and POS terminals.

- **Imports and Exports.** Used to export data from one database to another.

- **Transaction Export.** Used to export sales transactions from one database to another.

- **Item Entry.** Used to export stock movements from one database to another.

2.1 Setup Wizard

The Setup Wizard should be run when setting up a new company. The wizard leads the user through a number of steps that help you configure your LS Easy Retail database for the first time.

The Setup Wizard consists of three parts: Basic Setup, Import of Master Data and Store Wizard.

Each of these wizards has a number of steps. You do not need to complete all the steps at the same time since you can save them and return to them later.

2.2 Basic Setup (Setup Wizard)

Basic Setup helps you configure the basic setup for your company. This is the Wizard you run first when you set up a new company.

To Run the Basic Setup Wizard:

1. Click **LS Easy - Setup, Setup Wizard.**
2. Click on the **Setup Wizard** button in the **LSE Setup Wizard Intro** window.
3. Follow the instructions in the **LSE Setup Wizard** window as you go through the steps of setting up your company. The Wizard displays in the bottom left area how many steps there are left to complete.

The Basic Setup Wizard helps you configure the following items:

- Company information where you specify your company's name, address, contact info and logo to name a few.

- Your company's accounting periods, usually months within the year.

- Reason codes which are used to identify certain transactions within the system, such as negative adjustments, stock counts and the write-off of damaged goods.

- Units of measure for items within the system. This includes units such as boxes, pieces, crates, kilos and liters.

- The variant framework, which helps you track items in different sizes and colors. This feature is commonly used in fashion retailing.

- Retail users, which are used to assign permissions to your retail operators.

Note that once you mark a step as completed you cannot make additional changes within that step through the wizard. If you want to change settings in that step you do it through the setup menu.

2.3 Import Master Data

The master data import wizard helps you import data from an existing system. This can save a lot of tedious and error prone work.

Each step of the wizard imports data into one table. The wizard expects the data to be formatted in a certain way. The format of the files should be .csv, and the columns should be separated by a semicolon (;).

Note that the first line of the file is supposed to contain column name, not actual data, and will therefore not be implemented as data.

How to Use the Import Wizard:

1. Click **LS Easy - Setup**, **Setup Wizard**.
2. Click on the **Import Wizard** button in the **LSE Setup Wizard Intro** window.
3. Follow the instructions in the **LSE Setup Wizard** window as you go through the steps of setting up your company. The Wizard displays in the bottom left area how many steps there are left to complete.

You can view which columns are available for import by clicking the Show Layout button
You can import data into the following five tables:
- Vendor
- Item Category
- Product Group
- Item
- Customer

A full list of available fields can be found below.

2.3.1 Vendor

Column   Field Name

Column	Field Name
A	No.
B	Name
C	Address
D	Address 2
E	Post Code
F	Contact

2.3.2 Item Category

Column   Field Name

Column	Field Name
A	Code
B	Description
C	Def. Gen. Prod. Posting Group
D	Def. VAT Prod. Posting Group
E	Default Profit %

2.3.3 Product Group

Column   Field Name

Column	Field Name
A	Item Category Code
B	Code
C	Description

2.3.4 Item

Column   Field Name

Column	Field Name
A	No.
B	Description
C	Item Category Code
D	Product Group Code

E	Base Unit of Measure	Item Unit of Measure
F	Vendor No.	
G	Vendor Item No.	
H	Unit Price Including VAT	
I	Barcode 1	Barcodes
J	Barcode 2	Barcodes
K	Barcode 3	Barcodes
L	Barcode 4	Barcodes

2.3.5 Customer

Column	Field Name
A	No.
B	Name
C	Address
D	Address 2
E	Post Code
F	Contact

2.4 Store Wizard

The Store Wizard helps you configure your store and POS terminals. You run this wizard each time you set up a new store.

How to Use the Store Wizard:

1. Click **LS Easy - Setup**, **Setup Wizard**.
2. Click on the **Store Wizard** button in the **LSE Setup Wizard Intro** window.
3. Step one:
   a. Enter the store's name and address.
   b. Select the number of POS Terminals in that store.
   c. Place a check mark in the Inv. Worksheets field if you want to set up the Inventory Worksheets in the store.
   d. Place a check mark in the Inv. Handhelds field to configure the system to communicate with handheld terminals.
4. Step two is where you select the description of your POS Terminals and the user interface profile for the terminals.

You can modify the settings generated by the wizard at any time via the Store Card or the POS Terminal Card.

2.5 Import/Export Wizard

This Wizard is not a part of the setup procedure in LS Easy Retail. The Import/Export Wizard gives you the option to transfer data between databases within the system. An example where this would be used is where you have two stores and wish to use one of them as the master store. This implies that you enter new data into databases only in the master store and then export the files that contain the data to the other one.

It is not recommended to set up a scenario as described above for any major data distribution. The process is fully manual with no scheduling options. The export/import action always contains complete files as it is not possible to transfer modifications only. Running any number of stores using these methods involves too much manual work and the margin of error is too high.

However, the Import/Export Wizard can be useful in special cases, for example if you are running two databases and data in one of them is damaged or lost.

How to Use the Import/Export Wizard

1. Click **LS Easy - Setup**, **Import/Export Wizard**.
2. Determine whether the action to take is export or import.
3. Select the file to import/export.
4. Run the import/export action.

2.6 Transaction Wizard

This Wizard is not a part of the setup procedure in LS Easy Retail.
The Transaction Wizard helps you transfer transactional data between databases. This can be helpful if you want to consolidate your sales in one database.

Trans. Export Wizard
The Export Wizard helps you export your transactions. You must select the store you are exporting from as well as the starting and ending dates as well as the path to the file that will store the data.

To Use the Trans. Export Wizard

1. Click **LS Easy - Setup**, **Trans. Export Wizard**.
2. Select the transactions to export.
3. Select a file to export.
4. Run the export action.

Once you have moved the file to the second location you can import its contents into the database using the import wizard.

Trans. Import Wizard
The import wizard only contains two steps, the first being the selection of the data file and the second running the import.

To Use the Trans. Export Wizard

1. Click **LS Easy - Setup**, **Trans. Import Wizard**.
2. Select the transaction file to import..
3. Run the import action.

2.7 Item Entry

This Wizard is not a part of the setup procedure in LS Easy Retail.
The Item Entry wizard helps you move between databases item data that has not been posted through sales transactions, such as inventory, depreciation and negative adjustment. This can be helpful if you want to consolidate your inventory in one database.

Item Entry Export Wizard
The Item Entry Export Wizard helps you export this kind of data. You must select the file you wish to export and then run the export action.

Item Entry Import Wizard

The Item Entry Import Wizard only contains two steps, the first being the selection of the data file and the second running the import.

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3 Store Management

3.1 General

3.1.1 Setting up Stores

For setting up stores, POS terminals, staff and other store-related setup, we recommend that you use the Store Wizard, which is the most convenient method. It is, however, possible to approach this task in the conventional way through forms as described below.

You need to set up general store information, configure the distribution location setup for the store and set up tender types and POS functionality for the store.

To Set up Stores:

1. Click **LS Easy - Setup, Backoffice Setup, Store Card.**
2. Press **F3** to insert a new store.
3. If you have set up a default number series for stores, the system will fill in the **No.** field automatically. If not, you must fill it in.
4. On the **General** tab, the following fields are mandatory: **No., Name, Location Code** and **Department Code**. For help about a specific field, click the field and press **F1**.
5. On the **Statement/Closing** tab the following fields are mandatory: **Statement Method, Max.Diff. to Allow Post., Max Round. in Stmt., Rounding Account, Closing Method, Allowed Diff. in Trans.** For help about a specific field, click the field and press **F1**.
6. In the **Statement Nos.** field on the **Numbering** tab, click the Assist Button to see the **No. Series** window. Select the relevant number series, and then click **OK** to copy it to the field.
7. Fill in the remaining fields as needed.

3.1.2 Creating Items

Create Items is a tool to group items together and work on items before they are posted into real items. Create items acts therefore as temporary storage for items in the creation phase.

How to Use Create Items:

1. Click **LS Easy – BackOffice, Create Items**.
2. Press **Enter** to get new Item registration No.
3. On the **General** tab
- Select a **Vendor** to use
- Select **Country of Origin** if required
4. On the **Settings** tab, fill out the following fields as required:
- **Barcodes**, to select how to create barcodes for new items
- **Variants**, to determine how to create variants for new items, (only available if default item is a variant item).
- **No. Series** use a specific no. series when creating new items.
- **Default Item** to select an item to use as default item (template) when creating items.
5. In the line form fill in the following fields:
- **Description**, enter an item description
- **Category**, item category, if not the same as for the default item.
- **Product Group**, item product group if not the same as on for the default item.
- **Base Unit of Measure**, the base unit of measure for the item, if not the same as on default item.
- **Vendor Item No.**
- **Sales Price Inc. VAT**, item sales price including VAT.
- **Tariff No.**, Item tariff no., if required.
6. Click the button **Posting** and **Post To Items** to process entered data into items.

3.1.3   Creating Customers

The Customer table is used to record all information about all your customers.
The Customer table contains a card for each customer, on which you enter basic information such as name, address, and discount possibilities. Each customer must also have an identifying number. When you enter the customer number elsewhere in the program (on a sales, for example), the program will automatically use information from the Customer table for that particular customer.

You can post to a customer in an unlimited number of currencies. The resulting customer ledger entries will show the currency of each entry.

To Create a Customer:

1. Click **LS Easy – BackOffice, Customer Card** or for the same result click **LS Easy – Sales, Customers**.
2. In the **Customer** card displayed press F3 to create a new empty customer.
3. Enter the **No**. and **Name** of the customer.
4. Fill in the fields as needed. **Note** that following fields are mandatory:
- **Gen. Bus. Posting Group** under the **Invoicing** tab.
- **VAT Bus. Posting Group** under the **Invoicing** tab.
- **Customer Posting Group** under the **Invoicing** tab.
- **Application Method** under the **Payments** tab.

3.1.4   Creating Vendors

Vendors sell you items and raw materials. The Vendor table is used to record all information on all your vendors. Before you can post to a vendor, you must set up a connection from the relevant vendor card to a balance sheet account in the chart of accounts. You must set up a connection to an income statement account.
Then when you post to a vendor account, corresponding entries will automatically be created in the associated G/L accounts. The general ledger will therefore always agree with the Vendor's balance.
You can post to a Vendor in an unlimited number of currencies. The resulting vendor ledger entries will show the currency of each entry.

To Create a Vendor:

1. Click **LS Easy – Backoffice**, **Vendor Card**.
2. Or for the same result click **LS Easy – Purchase, Vendor**.
3. In the Vendor card displayed press **F3** to create a new empty vendor.
4. Type in a **No**. of the vendor and his **Name**.
5. Fill in the fields as necessary. **Note** that following fields are mandatory:
- **Gen. Bus. Posting Group** under the **Invoicing** tab.
- **VAT Bus. Posting Group** under the **Invoicing** tab.
- **Customer Posting Group** under the **Invoicing** tab.
- **Application Method** under the **Payments** tab.

3.1.5   Creating Statements

When all transactions from the POS terminals have been registered in a store's database, a statement can be created, calculated and then posted.
You use a statement to calculate the amounts in all transactions that have been created since the last store statement and register the counted tender types. The statement includes transaction for the period in the statement or for the currently open work shift. When all the necessary information is there, all counted amounts have been registered and the statement is ready to be posted.

To Create Statements:

1. Click **LS Easy - POS, Statements, Open Statement**.
2. Press **F3** to create a new statement.
3. In the **No.** field, select the relevant number series code.
4. In the **Store No.** field, enter the relevant store number.
5. If needed, fill in the **Trans. Starting Date** and **Trans. Ending Date** fields.
6. Fill in other fields as needed.

3.1.6   Setting up Item Categories

There are two levels of retail Product Grouping in LS Retail:

- **Item Categories**: the higher level. Each item Category includes a number of Product Groups.
- **Product Groups**: the lower level of grouping. Each Product Group includes a number of retail items.

It is important to have a well-defined Item Category structure, before you start setting up Item Categories. Before setting up Item Categories you should define how detailed the Item Category structure should be in order to best serve the needs of your business. Then you create item categories and assign closely related Product Groups to the same Item Category. To ensure the correct handling of retail items, you need to set up item Categories. You can use Item Categories to:

- Group Product Groups
- Base POS cost calculation on Item Categories
- Collect and view statistics on Item Category level

To Set up Item Categories:

1. Click **LS Retail - BackOffice, Setup, Item, Groups, Item Categories.**
2. Press **F3** to enter a new **Item Category**.
3. Fill in the **Code** and **Description** fields.
4. Fill in the other fields as necessary.

Repeat steps 2 and 4 for each Item Category you want to set up.

3.1.7   Setting up Item Families

A retail item can be a part of an item family. The item family groups together items that either have the same price, the same cost or both. When you change the price or cost for an item in a family with the same price, the program will prompt you whether you want to change the price or cost for the other items in the family.
When you have set up an item family you must assign retail items to the item family.

To Set up Item Families:

1. Click **LS Retail - BackOffice, Setup, Item, Groups, Item Families.**
2. Press **F3** to enter a new item family.
3. Fill in the **Code** and **Description** fields.
4. Place a check mark in the **Same Sales Price** and/or **Same Cost Price** field, if all the items in the selected family should have the same sales price and/or the same cost price.
5. Click OK to add the item to the new item family.

Repeat steps 2 to 5 for each item family you want to create.

3.1.8 Setting up Staff Members

Each staff member must have a number for identification purposes, both in the back office and on the POS terminals.

The system keeps records on staff members, such as ID number, address and phone number. You assign each member a type of authorization for various actions at the POS terminals, such as voiding transactions, performing tender declaration, overriding price, and maximum discount to give. A staff member can be assigned to a store.

Each staff member must be assigned user rights for logging correctly onto the system.

To Set up Staff Members:

1. Click **LS Easy – Setup, POS Setup, Staff Card.**
2. Press **F3** to enter a new staff member.
3. In the **ID** field, select the relevant number series for staff in the store, to which the staff member belongs.
4. In the **First Name, Last Name** and **Name on Receipt** fields, enter the name of the new staff member and how it should appear on receipts.
5. In the **Employment Type** field, select whether the staff member should be a *Cashier,* Salesperson or Other.
6. In the remaining fields on the **General** tab, define the user privileges of the staff member.
7. On the **Personal** tab, insert the relevant information as necessary.

Repeat steps 2 to 7 for each new staff member you want to set up.

3.1.9 Setting up Price Groups

In order to have additional item prices at the point of sale you need to define price groups. When you register additional item prices for an item, you assign price groups to the retail item. You can assign a number of price groups to an item.

To register additional prices you use price groups and item prices. A price group includes information about the locations in which the price is valid, the default currency code for the price group prices and which discounts are allowed.

When you have set up price groups you must assign those to the stores they are valid in, and set up the price group levels to define the priority of the price group in the Store.

You can set up different prices on different POS Terminals in your store by using price groups. This is done by creating a store within the store that contains the POS Terminals that should have other prices than the rest of the store. This new store will be assigned different price groups than the main store. Since the new store will have different price groups, you can assign different prices to items in those groups.

To Set up Price Groups:

1. Click **LS Easy – Setup, BackOffice Setup**, **Item**, **Groups, Retail Price Groups**. The **Retail Price Groups** window appears.
2. Fill in the **Code** field.
3. Fill in the **VAT Bus. Posting Gr. (Price)** to be used in Sales Price and Offers VAT calculation
4. Fill in other fields as needed.

3.1.10   Setting up Special Groups

A retail item can be a part of special groups. They are used for extra grouping out of the item hierarchy.

To Set up Special Groups:

1. Click **LS Easy – Setup, BackOffice Setup**, **Item**, **Groups, Special Groups.**
2. Press **F3** to enter a new Special Product Group.
3. Fill in the **Code** and **Description**.

To Assign Items to Special Groups:

1. Click **LS Easy – Back Office, Item Card**. The **Item Card** window appears.
2. Click **Item**, **Special Groups**.
3. In the field **Special Group** select the special group.

3.1.11   Setting up Sales Menus

You must set up a sales menu for each POS visual profile you are setting up. On the sales menu, you define the items or sales available at the POS terminal.

To Set up Sales Menus:

1. Click **LS Easy - Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profile**, **Menu Editor**, and the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in **Menu ID** and **Description** fields.
5. In the **Menu Type** field, select the menu type *Menu*.
6. In the **Map Enter** to field, preferably select the ITEMNO command. If so; leave the **Map Parameter** field blank.
7. In the **Key No.** field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** and **Command** fields as desired. The following commands are often used in the sales menu:
- INCEXP
- PLU_K
- LOOKUP

Repeat steps 7 and 8 for each menu line you want to include in the menu.

3.1.12   Setting up Sales After Midnight

When statement is created for store with opening hours after midnight then the statements Trans. data and time is set according to store settings of opening hours. Posting date will be the same as Trans. Starting Date and Trans. Ending Date will be the next day and Trans. Starting and Ending Time is set according to store opening hours. When a statement is posted, all entries will have the same posting date.

To Set up Sales after Midnight:

1. Click **LS Easy – Setup, Backoffice Setup, Retail Setup**.
2. In the **Retail Setup** window select the **Posting** tab.
3. Set the field **Item Posting Date** to **Statement Posting Date**.
4. Click **LS Easy – Setup, Backoffice Setup, Store Card.**
5. Find the store that has opening hours after midnight.
6. Click the field **Store Open After Midnight** on the **General** tab
7. Change the opening hours accordingly.

8. Create a number of sales. Some should have a time before midnight and other after midnight.
9. Click **LS Easy – POS, Statements, Open Statements**.
10. In the **Open Statement** window click **F3** to make a new statement.
11. Fill in the **Store No.** field and press **Enter**.
12. The **Trans. Starting/Ending Date** is filled out as well as the **Trans. Starting/Ending Time** fields.
13. The field **Trans. After Midnight** is selected.
14. Click **Functions** and **Calculate Statement.**
15. All sales that were created before and after midnight will be added to the statement.

3.1.13 Setting up Customer Payment Menus

You can set up a menu to pay into a customer's account, or include the menu lines in predefined menus.

You can also set up menu lines to register a customer's sale, without registering a payment into his account. This can be useful if you want to collect data about a sale to the customer or give him customer specific prices and discounts.

Before you can run customers at the POS terminals and before registering into customers accounts, you must have set up a lookup form for customers.

To Set up Customer Payment Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profiles**, **Menu Editor**, the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field, select the menu type *Menu*.
6. In the **Map Enter To** field, you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field, you can insert a parameter for that command.
7. In the **Key No.** field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** field.
9. In the **Command** field, select the *MENU* function.
10. In the **Parameter** field, select *CUSTOMER* lookup.
11. In the **Post Command** field, select the *TENDER_K* function.
12. In the **Post Parameter** field, select the tender type to which you want to post into.

If you want to register a sale into a customer account without posting payment into his account, follow steps 1 to 8 and then the following procedure:

9. In the **Command** field, select the *AMOUNT_K* function.
10. In the **Parameter** field, insert the amount of zero.
11. In the **Post Command** field, select the *TENDER_K* function.
12. In the **Post Parameter** field, select the tender type to which you want to post into.
13. Repeat steps 7 to 12 for each menu line you want to include in the menu.

For Help about specific POS commands look up the POS Commands in the online Help.

3.1.14 Setting up Income/Expense Accounts

You use income accounts to register direct income at the POS terminals, and expense accounts to register direct expenses at the POS terminals. You link all store income with income accounts, and store expenses with expense accounts. You assign G/L accounts to the accounts for posting as well as POS terminal receipt texts.

If you have already set up income/expense accounts for another store, you can copy the accounts from this store to the new store and change the setup where necessary.

You can assign infocodes to income/expense accounts and define extra prints for these as well.

To Set up Income/Expense Accounts:

1. Click **LS Easy - Setup, Backoffice Setup, Store Card.** Browse to the store, for which you want to set up income/expense accounts.
2. Click **Store, Income/Expense Accounts**.
3. Press **F3** to enter a new account.
4. In the **No.** and **Description** fields, enter a number and description for the account.
5. In the **Account Type** field, select the account type, *Income* or *Expense*.
6. In the **G/L Account** field on the **Posting** tab, select the relevant account number.
   Repeat steps 3 to 6 for each account you want to set up.

3.1.15 Setting up Open Category Sale

You can set up open category sale, meaning that when you have an item that does not have an item number registered, you can sell the item as a part of the Item Category.
Attention
When selling an open category sale, statistics will not be retained on item level, but on Item Category level. Also, the inventory will not be updated.

To Set up Open Category Sale:

1. Set up an **Item Category** for this purpose only.
2. Create a retail item. In the **Description** field, insert a description of the open category sale.
3. In the **Item Category Code** field on the **General** tab, select the relevant Item Category. The Item Category should only have this retail item assigned.
4. On the **POS Terminal tab** in the **Item Card** window, select the option *Must Key in New Price* in the **Keying in Price** field.

When performing an open department sale, you select the item created above as the **Item Category** to be sold.

3.1.16 Setting up Comparison Units of Measure

To calculate the item price for a comparison unit, you need to set up comparison units of measure and the conversion factors between them. For example, to calculate kilogram price for an item that is sold in a 100g package, you need to set up the conversion factor between the unit of measure of the item and the comparison unit. When you have set up comparison units of measure, you can assign those to items and have the program calculate the item price for the comparison unit, for example the kilogram price for an item that is sold in a 200 g package. Setting up comparison units of measure makes it possible to compare prices of items of varying quantity and units of measure.

Once you have defined the conversion factor between one unit and other two units, that is, between **A** and **B**, and **A** and **C**, the program will automatically calculate the conversion factor between **B** and **C**. This saves you a considerable amount of work when setting up comparison units of measure.

To Set up Comparison Units of Measure:

1. Click **LS Easy – Setup, BackOffice Setup, Item, Unit of Measure, Comparison Units of Measure**. The **Comparison Units of Measure** window appears.
2. Press **F3** to enter a new comparison unit of measure.
3. Fill in the **Code** and **Description** fields.
4. Click **Comp. Unit, Conversion**, for a unit you want to use as the basis for conversion. The **Conversion** window appears. Note that the program has automatically entered the conversion factor *1* between the chosen base comparison unit and itself.
5. In the **Comparison Unit Code** field, select a unit of measure.

6. Fill in the conversion factor in the **Conversion Factor** field, keeping in mind the equation: *Base Unit = Comparison Unit * Conversion Factor.*

Repeat steps 5 and 6 for additional units you want to convert to the base unit.

Once you have completed entering conversion factors between the base unit and the selected units, the program has created conversion entries and calculated conversion factors between each pair of the selected units.

Examples

You have set up three comparison units, Liter, Milliliter and Centiliter. You first select Liter to set up its conversion values. The conversion factor between Milliliter and Liter is 1000 and the conversion factor between Centiliter and Liter is 100. When you have entered this information in the Conversion window for Liter, the program has already created a conversion value entry for Milliliter and Centiliter. If you later add another unit, like fluid ounces, you only need to set up a conversion factor with one unit, such as Liter. The program then calculates and creates entries for the other units connected with Liter.

If the base unit is kilogram and the comparison unit is gram, the conversion factor is *1000*. If the base unit is gram and the comparison unit is kilogram, the conversion factor is *0,001*.

3.1.17 Voucher Handling

Vouchers can be issued as credit memo at the POS. Vouchers can also be used as payment. Payment with voucher is verified against the issued voucher and cannot exceed the original amount. If sales amount is less than the voucher, three various setup are available. Firstly customer gets a change back, secondly the POS will re-issue the voucher with the remaining amount and finally the voucher is cancelled and the customer will loose the remaining amount.

Prerequisite:
Tender type no. 7 for Vouchers must exist for the store being used. (See 3.5.12 Setting up Voucher Tender Type).

Further setup includes Data Entry, two Infocodes, Income/Expense account, Extra print setup for Tender Type and two POS buttons, these are described below:

To Set up Voucher handling:

1. **Data Entry**. Click **LS Easy, Data Entry**, the following fields have to be filled:
*   *Code*: Type in any descriptive code such as VOUCHER.
*   *Data entry only allowed*: checkmark ON
*   *Check amount*: checkmark ON
*   *Numbering*: select Automatic, or No. Series and select No. Series in the field below.
*   *Create Voucher Entry* and *Create Barcode*: checkmark ON
*   *Barcode Mask*: Which barcode mask is used for the voucher
2. **Infocodes**. Click **LS Easy Setup, POS Setup, General, Infocodes**, following fields have to be filled:
*   *Code*: Type in any descriptive code such as VOUCHER.
*   *Prompt*: This text will appear on the POS
*   *Type of input*: select Create Data Entry
*   *Data Entry Type*: select VOUCHER or the Data Entry created in step 1.
3. Create another **Infocode**, with the following settings:
*   *Code*: Type in any descriptive code such as VOUCHERIN, used for payment with voucher.
*   *Prompt*: This text will appear on the POS
*   *Type of input*: select Apply To Entry
*   *Data Entry Type*: select VOUCHER or the Data Entry created in step 1.
*   *Input Required*: checkmark ON

4. **Income/Expense account.** Click **LS Easy - Setup, Backoffice Setup, Store Card**, select the store you will be using, press the button **Store** and select **Income/Expense** account, with following settings:

- *No* = 10 and *Account type* = Income, on the **Posting** tab define *G/L Account*.

5. Press the button **Account** and select **Infocodes** and create one entry:

- *Infocode* = VOUCHER, *Input Required* = OFF, *When Required* = Always, *Sequence* = 0

6. Press **Account** and select *Extra Print Setup.* Print setup can be set up and customized in various ways. A print setup for VOUCHER is included in the Demo Data.

- *Setup ID.* For the field **Setup ID** select VOUCHER or the print setup you will use for the voucher printing.

- *When required* = Always

7. **Tender Type.** Click **LS Easy – Setup, Backoffice Setup, Store Card**, and select the store you will be using, press the button **Store** and select **Tender Types**. Find Tender Type no 7, Vouchers.

8. Press the button **Tend.Type** and select **Infocodes** and create two entries:

- First entry. *Infocode* = VOUCHER, *Input Required* = OFF, *When Required* = Negative, *Sequence* = 0

- Second entry. *Infocode* = VOUCHERIN, *Input required* = ON, *When Required* = Positive, *Sequence* = 0

9. On the **Tender Type** card press the button **Tend.Type** and **Extra Print** setup.

- *Setup ID.* For the field **Setup ID** select VOUCHER or the print setup you will use for the voucher printing.

- *When required* = Negative

10. **POS Button Voucher Sale.** Issue/sell voucher in the **POS Sales** menu. *Command* = INCEXP and *Parameter* = 10.

11. **POS Button Voucher Payment.** Payment with voucher in the POS Payment menu. *Command* = TENDER_K and *Parameter* = 7.

3.1.18 Specifying Receipt Texts

You must specify texts that will appear on receipts, checks and invoices, and displayed at the POS terminal.

To Specify Receipt Texts:

1. Click **LS Easy – Setup, POS Setup, POS Terminal Card**, the **POS Terminal Card** window appears.
2. Browse to the relevant POS terminal and click **POS Term., Receipt Printing**. The **POS Terminal Receipt Printing** window appears.
3. On the **General** tab, define the maximum length of the receipt and the number of empty lines at top and bottom.
4. On the **Top** tab, insert the text to appear at the top of the receipt, and define the properties of the text.
5. On the **Bottom** tab, insert the text to appear at the bottom of the receipt, and define the properties of the text.

3.1.19 Specifying Receipt Texts for Items

You can set up text that appears on the receipt for individual items. This can, for example, be useful if you want to remind the customer how to store an item. You can also set up texts with language codes and have the program choose the text with the same language code as the store location has.

To Specify Receipt Texts for Items:

1. Click **LS Easy**, **Item Card**. The **Item Card** window appears.
2. Click **Item**, **Text and Printing Setup**, **POS Terminal Receipt Text**. The **POS Terminal Receipt Text** window appears.
3. Fill in the lines with the text you want to appear on the receipt.
4. If needed, fill in the **Language Code** field, by selecting the relevant language.

3.1.20 Setting up Barcode Masks

When you want to set up barcode masks for general use, for example for coupons and data entry barcodes that you do not want to check against any barcode standards, you set up barcode masks with non-fixed format.

To Set up Barcode Masks:

1. Click **LS Easy - Setup, Backoffice Setup**, **Item**, **Barcodes, Barcode Mask Setup**. The **Barcode Mask Setup** window appears.
2. Press **F3** to create a new barcode mask.
3. In the **Type** field, select a type representing the barcodes created by the mask, for example, the *Item* option.
4. Lookup in the **Mask** field to define the barcode mask, the **Barcode Mask Setup Card** window appears.
5. Fill in the **Description** field.
6. Fill in the **Prefix** field, with whichever value you prefer except *02*, and *20-29*.

Now you must fill in the lines, which are split up in segments.

7. Click the **Barc. Mask** button and select **Card.**
8. Fill in the **Segment No**. field, the first line should have segment number 1, the second, segment number 2 and so on.
9. In the **Type** field, select the type of the segment you want to include in the Barcode Mask.
10. In the **Length** field, insert the number of characters you want to have in the segment.

Repeat steps 8 to 10 for each segment you want to set up. Remember to keep the latest segment free for a check digit, with the type *Check Digit* and the length *1*.

3.1.21 Setting up Barcode Masks for Standard Barcodes

Barcodes usually follow standards, like the EAN standard barcodes. The LS Retail system supports four standard barcode creation and checking:

- EAN 8
- EAN 13
- UPC-E
- UPC-A

If you have your own EAN license number and are creating barcodes in your business, you must register the license number in the **EAN License No.** field in the **Retail Setup** window.

To Set up Barcode Masks for Standard Barcodes:

1. Click **LS Retail - BackOffice, Setup, Items**, **Barcodes, Barcode Mask Setup**. The **Barcode Mask Setup** window appears.
2. Press **F3** to create a new barcode mask.
3. Lookup in the **Mask** field to define the barcode mask, the **Barcode Mask Setup Card** window appears.
4. Fill in the **Description** field.
5. Fill in the **Type** field. If you are setting up a barcode mask for retail items, you select the *Item* option.
6. Fill in the **Prefix** field. You must set up the prefix according to the standards you are using.

Now you must fill in the lines that are split up in segments:

7. Click the **Barc. Mask** button and select **Card.**
8. Fill in the **Segment No**. field, the first line should have segment number 1, the second, segment number to and so on.
9. In the **Type** field select the type of the segment you want to include in the Barcode Mask.
10. In the **Length** field insert the number of characters you want to have in the segment.

Repeat steps 8 to 10 for each segment you want to set up. Remember to keep the latest segment free for a check digit, with the type *Check Digit* and the length *1.*

Attention

In some North-European countries, when setting up EAN 13 barcodes, you must fill in the **Prefix** field with one of the following options:

*   20: for barcodes including price (two decimals)
*   21: for barcodes including price (one decimal)
*   22: for barcodes including price (no decimal)
*   23: for barcodes including weight/quantity (two decimals)
*   24: for barcodes including weight/quantity (one decimal)
*   25: for barcodes including weight/quantity (no decimals)

For further information about barcode standards: www.ean-int.org

3.1.22   Setting up Barcode Masks for Inhouse Barcodes

You can set up barcode creation and checking inhouse barcodes, that is, barcodes created and used in your company only, for example for the registration of items, customers' barcode numbers, and coupon numbers.

It is recommended to use a fixed structure for the inhouse barcode, using a specific barcode mask and a check digit.

Whether a fixed structure is needed for inhouse barcodes depends on the settings of the scanners on the POS terminals. Some scanners only validate barcodes with a specific format and check digits. The LS POS system supports input from scanners that read in the whole barcode number and check the barcode's check digit. When setting up barcodes and barcode masks you should be aware of the settings of the scanners the system will be using.

If you choose to use a barcode mask for items with variants, you can let the program generate the barcodes necessary to represent each size, color and style combination. If you do not use barcode masks for item variants, you need to type in the barcode for each variant combination; that is for all possible size, color and style combinations. It is therefore recommended to use barcode masks for item variant barcodes.

To Set up Barcode Masks for Inhouse Barcodes:

1. Click **LS Retail - BackOffice, Setup, Items**, **Barcodes, Barcode Mask Setup**. The **Barcode Mask Setup** window appears.
2. Press **F3** to create a new barcode mask.
3. Lookup in the **Mask** field to define the barcode mask, the **Barcode Mask Setup Card** window appears.
4. Fill in the **Description** field.
5. Fill in the **Type** field. If you are setting up a barcode mask for retail items, you select the *Item* option.
6. Fill in the **Prefix** field, all inhouse barcodes should have the prefix *02* to comply with the EAN13 standard.

Now you must fill in the lines that are split up in segments.

7. Click the **Barc. Mask** button and select **Card.**
8. Fill in the **Segment No**. field, the first line should have segment number 1, the second, segment number 2 and so on.
9. In the **Type** field, select the type of the segment you want to include in the Barcode Mask.
10. In the **Length** field, insert the number of characters you want to have in the segment.

Repeat steps 8 to 10 for each segment you want to set up. Remember to keep the latest segment free for a check digit, with the type *Check Digit* and the length *1*.

Attention

> If you want to construct a barcode mask that includes size, color or style digits, the corresponding variant groups must be assigned to the Product Group. The program will compare the length of No. in Barcode for the sizes, colors or styles to the number of size, color and size digits respectively. They need to be of exactly same length.

Example

> 02IIIIIICCSSM
> This is an EAN 13 standard barcode mask, including an the inhouse item number - 6 digits, two color digits, two style digits and the check digit.

3.2 Worksheets

The worksheet gives the user a common look and feel for all journal stock-keeping processes. For each worksheet there is a Mask record that controls the behavior of the worksheet and worksheet lines. The worksheets work on top of standard Microsoft Dynamics NAV item journal lines and requisition lines, and the system uses worksheet lines for journals not offered by Microsoft Dynamics NAV. The worksheets are defined for specific stores. This makes it possible to define a specific configuration for each store.

The following 6 types of worksheets are available in LS Easy:

- **Purchase**- used to order goods.
- **Positive Adjustment** - used to post positive adjustment.
- **Negative Adjustment** - used to post negative adjustment.
- **Transfer** - used for inventory transfer between stock locations.
- **Counting** - used for inventory counting.
- **Label Ordering** - used to order the printing of item labels.

See below for further information about each type of worksheet.

3.2.1 How to Use a Purchase Worksheet

1. Click **LS Easy – Backoffice, Worksheets**.
2. Select from the list the **Purchase Worksheet** you want to use.
3. Click the button **Worksheet** and select **Entries** (**F5**).
4. In the **Purchase Worksheet** line form, enter the items you want to purchase. Get a new line by pressing **F3** or fill in a new line at the bottom.
5. Fill in the following fields:
- **No**.: Item number
- **Variant Code**: Item variant Code if required
- **Quantity**: Quantity to order
- **Vendor No**.: Vendor No. of the vendor the item is to be ordered from. Worksheets can be defined to use fixed Vendor No.
6. After entering the items close the Purchase Worksheet line form.
7. Click the button **Worksheet** and select **Accept** to accept the worksheet as ready to be posted.
8. Click the button **Worksheet** and select **Post** to process entries into purchase orders.
9. Click **LS Easy – Purchase, Order** and process as normal **Purchase Orders**.

3.2.2   How to Use a Positive Adjustment Worksheet

1. Click **LS Easy – Backoffice, Worksheets.**
2. Select the **Positive Adjustment** worksheet you want to use from the list.
3. Click the button **Worksheet** and select **Entries** (**F5**).
4. In the **Inventory Worksheet** line form enter the items you want to adjust. Get a new line by pressing **F3** or fill in a new line at the bottom.
5. Fill in the following fields
- **Item No**.: Item number
- **Variant Code**: Item variant Code if required
- **Quantity**: Quantity to adjust
6. After entering the items close the **Inventory Worksheet** line form.
7. Click the button **Worksheet** and select **Accept** to accept the worksheet as ready to be posted.
8. Click the button **Worksheet** and select **Post** to post the positive adjustment.

3.2.3   How to Use a Negative Adjustment Worksheet

1. Click **LS Easy – BackOffice, Worksheets**.
2. Select the **Negative Adjustment** worksheet you want to use from the list.
3. Click the button **Worksheet** and select **Entries (F5)**.
4. In the **Inventory Worksheet** line form enter the items you want to adjust. Get a new line by pressing F3 or fill in a new line at the bottom.
5. Fill in the following fields:
- **Item No.**: Item number
- **Variant Code**: Item variant Code if required
- **Quantity**: Quantity to adjust
6. After entering the items close the **Inventory Worksheet** line form.
7. Click the button **Worksheet** and select **Accept** to accept the worksheet as ready to be posted.
8. Click the button **Worksheet** and select **Post** to post the negative adjustment.

3.2.4   How to Use a Label Worksheet

1. Click **LS Easy – Backoffice, Worksheets**.
2. Select the **Label Worksheet** you want to use from the list.
3. Click the button **Worksheet** and select **Entries (F5)**.
4. In the **Labels** line form enter the items you want to order labels for. Get new line by pressing **F3** or fill in a new line at the bottom.
5. Fill in the following fields:
- **No.**: Item number
- **Variant Code**: Item variant Code if required
- **Quantity**: Numbers of labels to order.
6. After entering the items close the Labels line form.
7. Click the button **Worksheet** and select **Accept** to accept the worksheet as ready to be posted.
8. Click the button **Worksheet** and select **Post** to process the labels orders into labels requests.
9. Click **LS Easy – Backoffice, Labels, Shelf Label/Item Label Printing** and process as normal label requests.

3.2.5 How to Use a Counting Worksheet

1. Click **LS Easy – BackOffice, Worksheets**.
2. Select the **Counting Worksheet** you want to use from the list.
3. Click the button **Worksheet** and select **Entries (F5)**.
4. In the **Inventory Worksheet** line form enter the items you want to count. Get new line by pressing **F3** or fill in a new line at the bottom.
5. Fill in the following fields
- **Item No.**: Item number
- **Variant Code**: Item variant Code if required
- **Qty. (Phys. Inventory)**: Counted quantity
6. After entering the items, close the **Inventory Worksheet** line form.
7. Click the button **Worksheet** and select **Accept** to accept the worksheet as ready to be posted.
8. Click the button **Worksheet** and select **Post** to post the inventory counting.

3.2.6 How to Use a Transfer Worksheet

1. Click **LS Easy – BackOffice, Worksheets**.
2. Select the **Transfer Worksheet** you want to use from the list.
3. Click the button **Worksheet** and select **Entries (F5).**
4. In the **Inventory Workshee**t line form enter the items you want to transfer. Get new line by pressing **F3** or fill in a new line at the bottom.
5. Fill in the following fields:
- **Item No**.: Item number
- **Variant Code**: Item Variant Code if required
- **Quantity**: Quantity to transfer
6. After entering the items close the **Inventory Worksheet** line form.
7. Click the button **Worksheet** and select **Accept** to accept the worksheet as ready to be posted.
8. Click the button **Worksheet** and select **Post** to post the inventory transfer.

3.3 Inventory Masks

The system uses inventory Masks to control the worksheets giving the user a unified look and feel when performing inventory tasks. The mask defines the behavior and automatic data entry by the system and can be defined to a specific store or user. This method simplifies the job for the user. Batch and radio frequency handheld terminals can be used with the system. The system offers two types of batch handheld terminals: general batch handheld terminals that collect simple data (barcode and quantity) and batch handheld terminals that can run the handPoint (www.handPoint.com) batch handheld solution. The radio frequency handheld terminal solution gives the ability to control the inventory process by leading the user through defined processes. Inventory masks are used to define worksheets and to set up how they behave.

The following 6 types of worksheets are available in LS Easy:

- **Purchase -** used to order goods.
- **Positive Adjustment -** used to post positive adjustment.
- **Negative Adjustment -** used to post negative adjustment.
- **Transfer -** used for inventory transfer between stock locations.
- **Counting -** used for inventory counting.
- **Label Ordering -** used to order printing of item labels**.**

See below for information on how to set up masks to use with the above worksheets.

3.3.1 How to Set up Purchase Masks

1. Click **LS Easy – Setup, BackOffice Setup, Inventory Setup, Inventory Mask Setup**.
2. On the **General** tab fill in the following fields:
- Select **Entry Type** *Purchase*.
- Enter a **Description**, describing the purpose of this worksheet.
- Select which Requisition template to use with this worksheet in the fields Template and Batch.
3. On the **Dimension** tab fill in the following field:
- **Department Code**, the dimension code of the store.
4. On the **Location** tab fill in the following fields:
- **Store**, the store no. of the store using the worksheet.
- **Location** - the stock location within the store.

3.3.2 How to Set up Positive Adjustment Masks

1. Click **LS Easy – Setup, BackOffice Setup, Inventory Setup, Inventory Mask Setup**.
2. On the **General** tab fill in the following fields:
- Select **Entry Type** *Positive*.
- Enter a **Description,** describing the purpose of this worksheet.
- Select which Item Journal template to use with this worksheet, in the fields **Template** and **Batch**.
3. On the **Dimension** tab fill in the following fields:
- **Department Code**, dimension code of the store.
- **Reason Code**, the reason code for this positive adjustment.
4. On the **Location** tab fill in the following fields:
- **Store**, store no. of the store using the worksheet.
- **Location**, stock location within the store.

3.3.3 How to Set up Negative Adjustment Masks

1. Click **LS Easy – Setup, Backoffice Setup, Inventory Setup, Inventory Mask Setup**.
2. On the **General** tab fill in the following fields:
- Select **Entry Type Negative**.
- **Description**, enter text describing the purpose of this worksheet.
- Select which Item Journal template to use with this worksheet, in the fields **Template** and **Batch**.
3. On the Dimension tab fill in the following fields:
- **Department Code**, the dimension code of the store.
- **Reason Code**, the reason code for this negative adjustment.
4. On the **Location** tab fill in the following fields:
- **Store**, the no. of the store using the worksheet.
- **Location**, stock location within the store.

3.3.4 How to Set up Transfer Masks

1. Click **LS Easy – Setup, BackOffice Setup, Inventory Setup, Inventory Mask Setup**.
2. On the **General** tab fill in the following fields:
- Select **Entry Type** *Transfer*.
- Enter a **Description**, describing the purpose of this worksheet.
- Select which Item Journal template to use with this worksheet, in the fields **Template** and **Batch**.
3. On the **Dimension** tab fill in the following field:
- **Department Code**, the dimension code of the store.
4. On the **Location** tab fill in the following fields:

- **Store**, the store no. of the store using the worksheet.
- **Location** -the stock location within the store.
- **New Store Code**, the no. of the store using the worksheet, same as Store.
- **New Location**, the destination location of the transfer within the store.

3.3.5 How to Set up Counting Masks

1. Click **LS Easy – Setup, Backoffice Setup, Inventory Setup, Inventory Mask Setup**.
2. On the **General** tab fill in the following fields:
- Select the **Entry Type** *Counting.*
- Enter a **Description**, describing the purpose of this worksheet.
- Select which Item Journal template to use with this worksheet, in the fields **Template** and **Batch**.
3. On the **Dimension** tab fill in the following fields:
- **Department Code**, dimension code of the store.
- **Reason Code**, the reason code for this stock count.
4. On the **Location** tab fill in the following fields:
- **Store**, store no. of the store using the worksheet.
- **Location**, stock location within the store.

3.3.6 How to Set up Label Ordering Masks

1. Click **LS Easy – Setup, Backoffice Setup, Inventory Setup, Inventory Mask Setup**.
2. On the **General** tab fill in the following fields:
- Select the **Entry Type** *Label.*
- Enter a **Description**, describing the purpose of this worksheet.
- Select which label type to use with this worksheet, in the fields **Template** and **Batch.**
3. On the **Dimension** tab fill in the following fields:
- **Department Code**, dimension code of the store.
4. On the **Location** tab fill in the following fields:
- **Store**, store no. of the store using the worksheet.
- **Location**, stock location within the store.

3.4 Handhelds

3.4.1 Setting up Handhelds

Before you can start importing data from Generic batch handhelds you must configure a handheld setup to use for the import. The handheld setup includes import paths and other information needed to successfully import a Generic handheld batch file.

To Set up a New Handheld:

1. Click **LS Easy – Setup, BackOffice, Handheld Setup**. The **LS Handheld Setup** window appears.
2. Create a new record (**F3**) and type in **ID, Name** and **Store** for the handheld.
3. Select the **Batch Handhelds** tab and set the **Import Path** to the path where the import files are stored
4. Set the **External Import Process** to an executable if you want to run an external task before the import begins.
5. Set the Path for **Batch Backup** to a folder where the import files will be stored after import.

3.4.2 Importing Handheld Data into Worksheets

Data from Batch Handhelds can be imported into worksheets from the worksheet form in the Inventory Management System. You must have finished setting up handhelds in order to do this.

To import data from handheld into worksheet:

1. Click **LS Easy – BackOffice, Worksheets**. The **Worksheets** window appears.
2. Select the worksheet you want to import data into.
3. Select **Import** from the **Handhelds** Menu Button.
4. If more than one handheld is available for this location you must choose a handheld to use from the list that pops up.
5. The system will ask for confirmation of import. Select **Yes**.
6. If you have selected an External Import Process the system might ask you if you want to allow execution of that process. Select **Yes**.

Import files are processed depending on the **Entry Type** of the worksheet (see Inventory Mask Setup). Each line in the import file represents one line in the worksheet.

Each line is divided into a **Barcode/Item No.** field, **Quantity** field and **Zone** field. The **Zone** field is only used in **Area/Zone Counting**. An example of a file would be:

> **Example 1** (Item 1000, Quantity 10)
> 1000;10;
> **Example 2** (Barcode 8716065001969, Quantity 20, Area 4)
> 8716065001969;20;4

3.5 Tender Operations

3.5.1 Setting up Store Tender Types

In LS Easy you can configure a wide range of different functionality for the tender types in each store. You enter details for handling amount, change, slip printing, authorization, posting and so on. Each setup depends on the tender types being set up.

For each tender type used in the store, you need to define several properties, such as how it handles amount, change and so on, to ensure that its usage is correct at the POS terminals. You also register the G/L account or bank account into which to post the tender type.

If you have already set up tender types for another store, you can copy the tender types from that store to the new store and change the setup where necessary.

You can assign an infocode to each tender type you set up to prompt the cashier at run time, to create or check entries with unique entry codes or collecting information from the cashier inserted at run time.

You can also assign extra print setup to each tender type.

Before you set up any tender types in LS Retail, you need to set up the general tender types.

To Set up Tender Types:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card.**
2. Browse to the relevant store.
3. Click on the **Store** button and select **Tender Types**.
4. Press **F3** to insert a new tender type.
5. Select a general tender type in the **Code** field. The system will insert default settings.
6. Fill in the remaining fields as necessary.

Repeat steps 4 to 6 for each tender type you want to set up.

3.5.2 Setting up Cash

Certain tender types must be set up with specific properties. One of these is cash.

To Set up Cash:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card**. Browse to the relevant store. Click **Store, Tender Types**.
2. Press **F3** to insert a new tender type.
3. Select the general tender type representing **Cash** in the **Code** field, and the system will insert default settings for the tender type.
4. Place a check mark in the **May Be Used** and **Drawer Opens** fields.
5. On the **Amount** tab, allow over- and under-tendering. You may also want to insert check marks in the **Return/Minus Allowed** and **Keyboard Entry Allowed** fields. Finally, in the **Rounding** and **Rounding To** fields, you must define the rounding properties.
6. On the **Posting** tab fill in the **Account Type, Account No.** and **Difference G/L Acc.** fields. You may also want to fill in the **Multiply in Tender Operations, Float Allowed, Counting Required** and **Compress Paym. Entries** fields.

3.5.3 Setting up Cash Declaration Setup

When working on statements, you can declare tender in the statement and/or redeclare tender from the POS terminals. For each store you must set up a cash declaration setup. You can also copy a pre-existing cash declaration setup.

To Set up Cash Declaration Setup:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card** and the **Store Card** appears.
2. Click **Store**, **Cash Declaration Setup**.
3. In the **Cash Declaration Setup** window, select a coin or a note in the **Type** field.
4. Insert the relevant amount for the coin/note you are setting up in the **Amount** field.
5. If needed, select the relevant currency in the **Currency Code** field.

Repeat steps 2 to 5 for each type of cash you are setting up.

3.5.4 Setting up Cards

The Cards tender type represents all types of cards used in your system, such as debit or credit cards. Only one Card tender type representing cards should be set up in each store, the specific manufacturers types of cards are then defined in the Card Setup.

To Set up Cards:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card**. Browse to the relevant store. Click **Store**, **Tender Types**.
2. Press **F3** to insert a new tender type.
3. Select the general tender type representing cards in the **Code** field, the system will insert default settings for the tender type.
4. On the **General** tab, place a check mark in the **Card/Account No.** field if you want the program to prompt the cashier for the card number. You can enter the text prompted in the **Ask for Card/Account** field.
5. On the **Amount** tab, place a check mark in the **Undertender Allowed** field.
6. On the **Printing** tab, enter printing specifications.

3.5.5 Setting up Card Setup

To use the tender type *Cards*, you must set up the manufacturer cards available in your market, that is, debit and credit cards such as VISA and Eurocard.

To Set up Card Setup:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card**. Browse to the relevant store. Click **Store, Tender Types**.
2. Click **Tender Type, Card Setup**.
3. Press **F3** to insert a new tender card.
4. Fill in the **Card No.** and **Description** fields.
5. On the **Posting** tab, fill in the **Account Type, Account No.** and **Difference G/L Account** fields.

Repeat steps 3 to 6 for each card setup.

3.5.6 Setting up Checks

You need to set up the Checks tender type to be able to receive payment in checks in your store. There are certain settings you must carry out for the checks tender type.

To Set up Checks:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card**. Browse to the relevant store. Click **Store, Tender Types**.
2. Press **F3** to insert a new tender type.
3. Select the general tender type representing checks in the **Code** field, and the system will insert default settings for the tender type.
4. On the **General** tab, place a check mark in the **Card/Account No.** field
5. If you want the program to prompt the cashier for a card or account number, you can enter the prompt text in the **Ask for Card/Account** field.

3.5.7 Setting up Currency Tender Type

The Currency tender type represents all currency used in the LS Retail system. Before you can use this tender type, you must set up currencies and specify retail information for currencies.

There are certain settings you must carry out for the currency tender type.

To Set up Currency Tender Type:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card**. Browse to the relevant store. Click **Store, Tender Types**.
2. Press **F3** to insert a new tender type.
3. Select the general tender type representing currency in the **Code** field, the system will insert default settings for the tender type.
4. Place a check mark in the **May Be Used** and **Drawer Opens** fields.
5. On the **Amount** tab, allow over- and under-tendering.
6. You may also want to insert check marks in the **Return/Minus Allowed** and **Keyboard Entry Allowed** fields.
7. In the **Rounding** and **Rounding To** fields, you must define the rounding properties.
8. On the **Posting** tab fill in the **Account Type, Account No.** and **Difference G/L Acc.** fields.
9. You may also want to fill in the **Multiply in Tender Operations, Float Allowed, Counting Required and Compress Paym. Entries** fields.

3.5.8 Setting up Currency Menus

You can set up menus that define currency, when you receive payment in currency and want to post it into a currency account.

To Set up Currency Menus:

1. Click **LS Easy - Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profile, Menu Editor**. The **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field, select the menu type *Menu*.
6. In the **Map Enter To** field, you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field, you can insert a parameter for that command.
7. In the **Key No.** field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** field.
9. In the **Command** field, select the TENDER_K function.
10. In the **Parameter** field select the tender type into which you want to post.
11. In the **Post Command** field select the CURR_K function.
12. In the **Post Parameter** field select the currency that you want to which account you want to post.

Repeat steps 7 to 12 for each menu line you want to include in the menu.

3.5.9 Specifying Retail Information for Currencies

You can use currencies on the POS terminals. When specifying retail specific information for currencies, you build on the currencies set up for the standard Microsoft Navision system, and add retail information, such as the exchange rate on POS terminals and the currency symbol used on POS terminals.

To Specify Retail Information for Currencies:

1. Click **LS Easy – Setup, POS Setup**, **General**, **Retail Currencies** and the **Retail Currencies** window appears.
2. Browse to the relevant currency and click **Currency**, **Card**.
3. Fill in the **Currency Card** with the help of the online Help for the standard Microsoft Navision system.
4. On the **POS Terminal** tab, you should fill in the **POS Currency Symbol** and **Lowest Accept. Denomin. Amt.** fields.
5. If you want to determine exchange rate at POS terminals, click **Exch. Rates** and fill in the **POS Exchange Rate Amount** and **POS Rel. Exch. Amount** fields.

3.5.10 Setting up Gift Cards

This tender type represents vouchers issued and endorsed at the POS terminals. To issue gift cards you must also set up an item representing the gift card. There are certain settings you must carry out for the gift card tender type.

When you set up gift cards you must also set up infocodes both for issuing and endorsing gift cards, each with their own types of data entries linked to the infocode. If you want to have a check on the amount that lies behind the application entry, place a check mark in the **Check Amount** field in the **POS Data Entry Type** window. This results in that the gift card is only accepted for tender if the amount for the purchase matches the one on the gift card.

You should also set up and assign extra prints for issuing, and if needed, endorsing gift cards.

To Set up Gift Cards:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card**. Browse to the relevant store. Click **Store, Tender Types**.
2. Press **F3** to insert a new tender type.
3. Select the general tender type representing vouchers in the **Code** field, the system will insert default settings for the tender type.
4. On the **Amount** tab, allow over and under-tendering.
5. Click **Tender Type, Infocodes**. In the **Infocode Code** field, select the relevant infocode.
6. Close the **Tender Type Infocodes** window.
7. Click **Tender Type, Extra Print Setup**. In the **Setup ID** field, select the relevant extra print. There is usually one infocode for issuing gift cards and one for endorsing.
8. Close the **POS Extra Printouts** window.

3.5.11 Setting up Gift Card Items

To issue gift cards, you must set up an item representing the gift card.

To Set up Gift Card Items:

1. Click **LS Easy - BackOffice**, **Item Card**.
2. Press **F3** to create a new item.
3. Refer to the Online Help for information on creating retail items. Note that the item's description should refer to gift cards.
4. If you do not want the price of the gift card to be predefined, select the **Must Key in New Price** option in the **Keying in Price** field on the **POS** tab.
5. Click **Item**, **POS, Infocodes**.
6. In the **Infocode Code** field, select the relevant infocode - one that assigns gift card numbers.
7. Close the **Item Infocodes** window.
8. Click **Item, POS, Extra Print Setup**. In the **Setup ID** field, select the relevant print setup - one that prints a gift card.
9. Close the **POS Extra Print Setup** window.

Repeat steps 1 to 4 for each gift card item you want to set up. If you do not define the price of the item, one gift card should be enough.

3.5.12 Setting up Voucher Tender Type

This tender type represents vouchers issued and endorsed at the POS terminals. There are certain settings you must carry out for the voucher tender type.

When you set up vouchers you must also set up infocodes both for issuing and endorsing vouchers, each with their own types of data entries linked to the infocode. If you want to have a check on the amount that lies behind the application entry, place a check mark in the **Check Amount** field in the **POS Data Entry Type** window. This results in that the voucher is only accepted for tender if the amount for the purchase matches the one on the voucher.

You should also set up and assign extra prints for issuing, and if needed, endorsing vouchers.

To Set up Vouchers:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card**. Browse to the relevant store. Click **Store, Tender Types**.
2. Press **F3** to insert a new tender type.
3. Select the general tender type representing vouchers in the **Code** field, and the system will insert default settings for the tender type.
4. On the **Amount** tab, allow over and under-tendering.
5. Click **Tender Type, Infocodes**. In the **Infocode Code** field, select the relevant infocode. There is usually one infocode for issuing vouchers and one for endorsing.
6. Close the **Tender Type Infocodes** window.
7. Click **Tender Type, Extra Print Setup**. In the **Setup ID** field, select the relevant extra print. There is usually one infocode for issuing vouchers and one for endorsing
8. Close the **POS Extra Printouts** window.

3.5.13   Setting up Customer Accounts

The customer account tender type allows you to charge the payment at sales time to a customer account from the POS terminal.

To Set up Customer Accounts:

1. Click **LS Easy – Setup, Backoffice Setup, Store Card**. Browse to the relevant store. Click **Store, Tender Types**.
2. Press **F3** to insert a new tender type.
3. Select the general tender type representing cards in the **Code** field, the system will insert default settings for the tender type.
4. On the **General** tab, place a checkmark in the **Card/Account No.** field. If you want the program to prompt the cashier for the account number, you can enter the prompt text in the **Ask for Card/Account** field.
5. On the **Amount** tab, allow over and under-tendering. You may also want to place a check mark in the **Return Minus Allowed** and **Keyboard Entry Allowed** fields.
6. On the **Printing** tab, you may want to enter a text prompting the cashier to insert an invoice into the printer.

4 POS

4.1 General

4.1.1 Setting up POS Terminals

For each POS terminal you can set up a variety of features. You need to enter information concerning the operation and functionality of the POS terminals, such as discounts and handling of returns. You should also enter texts that will be printed on receipts, checks and invoices and displayed at the POS terminal.

To Set up POS Terminals:

1. Click **LS Easy - Setup, POS Setup, POS Terminal Card**.
2. Press **F3** to insert a new POS terminal.
3. Fill in the **No**. and **Description** fields.
4. Fill in the following mandatory fields: **Store No.**, **Hardware Profile** and **Interface Profile**. For help about a specific field, click the field and press **F1**.
5. On the **Display** tab, select settings for the customer display, if needed.
6. Click **POS Term.**, **Receipt Printing** to specify receipt texts.

Repeat steps 2 to 6 for each POS terminal you want to set up.

4.1.2 Setting up Printers On POS

You can set up a printer for each hardware profile you are using. You can set up preferences and properties both for the receipt and the document printer.
When creating a new hardware profile, all commands for the printer are set up by default. You can change those settings if needed.

To Set up Printers on POS:

1. Click **LS Easy - Setup, POS Setup, POS Profiles, Hardware**.
2. Browse to the relevant hardware profile and click the **Printer** tab.
3. If using an OPOS driver, select the *OPOS* option in the **Printer** field.
4. If you use Windows printing, select *None* in the **Printer** field. Then go to the **Functionality** profile and set up your printing under the **Windows printing** tab.
5. If the *OPOS* option was selected in the **Printer** field, you must enter the OPOS driver name for the printer here. Both the Programmatic ID and the Logical Device Name can be used as the Device Name for the printer. You can find the Programmatic ID and the Logical Device Name in the registry: *HKEY_LOCAL_MACHINE\SOFTWARE\OLEforRetail\ServiceOPOS\POSPrinter.*
6. Fill in other fields as needed.

4.1.3 Price Checking Including Deals

A POS button with POS command PRICECHK allows the user to check the price of an item without it being entered into the POS journal as a sold item. If the item being checked is a part of a deal(s) the name of the deal is displayed.

To use Price Checking

Preparation
- Set up a button in the POS with the command PRICECHK (see 4.2.4).
- Add an item (referred to as Item A) to one deal (see 4.2.1).
- Add another item (referred to as Item B) to two deals (see 4.2.1).

To Use Price Checking:

1. Set the **LS Easy – Setup, POS Local Setup** to use the same store used in the preparation use cases.
2. Click **LS Retail – POS, Retail POS** and log on the POS.
3. Click the **Price Check** button.
4. A message saying "*Scan or enter item number*" will appear.
5. Scan or enter any item number that does not belong to a deal.
6. A message with the Item number, Item name and Price is displayed.
7. Click the **Price Check** button again.
8. Enter item number of **Item A** into the POS.
9. Two message lines will be displayed; First line has the item number, item name and price displayed. The second line will show the deal number and name.
10. Click the **Price Check** button again.
11. Enter item number of **Item B** into the POS.
12. Two message lines will be displayed; First line has the item number, item name and price displayed. The second line will display message "Part of 2 active offers".

4.1.4   Setting up Dual Display

By using Dual Display it is possible to use the second screen as customer display (half part) and half has presentation screen, which can view .avi, .bmp, .jpg, and so on in .html format (html viewer). Dual display runs only on local installations, not on Citrix.
Demo html files are part of the LS Retail Toolbox setup, as well as the Ddisp.exe, which is the program that runs the second screen.

To Set up Dual Display:

1. Click **LS Easy - Setup, POS Setup, POS Profiles, Hardware.** The **POS Hardware Profile Card** window appears.
2. Go to the tab **Line Display**, in the field **Display,** select **Dual Display**.
3. In the field **Display Device Name**, browse for and select one of the demo html files that is distributed with the LS Retail Toolbox, for example C:\Program Files\LS Retail\Toolbox\DualDisplay\Demo\startup.html
4. Exit the **Hardware** profile
5. In command prompt, run the **Ddisp.exe**
6. When starting a sale on the POS, half of the screen should change into customer display.

4.1.5   Setting up Fixed Keys

You can set up a menu for fixed keys. Fixed keys are keys that are on the POS terminal keyboard. They have certain names or values that are predefined and can be found in the hardware documentation. You can assign numbers to each one, making them identifiable to the program. You can assign functions to some of these keys through a fixed keys menu. There should only be one fixed key menu in each visual profile.

To Set up Fixed Keys:

1. Click **LS Easy - Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profile**, **Menu Editor**, and the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** field.
5. In the **Menu Type** field, select **Fixed Keys**.
6. In the **Description** field, enter a description for the menu.
7. Do not fill in the **Map Enter To** and **Map Parameter** fields.

8. In the **Key No.** field, enter the number of the fixed key you want to assign a function to. This number should already have been defined as a menu key in the **POS Key Commands** window.
9. Fill in the **Description** field.

Repeat steps 8 and 9 for all fixed keys you want to set up.

4.1.6   Setting up Key Command

Before manipulating keys you should set up key commands, to assign numbers to menu keys, fixed keys as well as commands for defining keyboard wedging. You can set up key commands for each hardware profile you are using.

To Set up Key Commands:

1. Click **LS Easy - Setup, POS Setup, POS Profiles, Hardware**. The **POS Hardware Profile Card** window appears.
2. Browse to the relevant hardware profile and click **Profile, Key Commands**, the **POS Key Commands** window appears.
3. In the **Key Name** field, enter the value of the key, to which you want assign a number. For the menu keys, this value can for example be in the range *Shift+F1 to Shift+F8* (top to bottom), although these values may differ between hardware manufacturers. If you are unsure of the appropriate values for you hardware, refer to the hardware documentation.
4. Fill in the **Key Name, Description, Key Type** and **Key No.** fields.

Repeat steps 3 and 4 for all key commands you want to set up.

4.1.7   Setting up Keyboard Wedge

You can set up keyboard wedge for LS POS. A keyboard wedge needs to be defined when a peripheral (MSR or Scanner) is connected through the keyboard port. If you define a keyboard wedge with the prefix of the peripheral, the program will recognize the signature value and interpret the transmission as from the peripheral instead of a keyboard input. You can set up a keyboard wedge for each hardware profile you are using.

To Set up Keyboard Wedge:

1. Click **LS Easy - Setup**, **POS Setup, POS Profiles, Hardware**. The **POS Hardware Profile Card** window appears.
2. Browse to the relevant hardware profile and click **Profile, Key Commands**, the **POS Key Commands** window appears.
3. Press **F3** to create a new key command.
4. In the **Key Name** field, enter the signature value of the peripheral you are defining a keyboard wedge for. Refer to the hardware documentation for information about this value.
5. In the **Description** field, enter a description for the wedge.
6. In the **Key Type** field, select **Wedge**.
7. In the **Key No.** field, enter *0* (zero).
8. In the **Wedge** option field, select **MSR** or **Scanner**, determining whether the specified Keyboard Wedge signature value belongs to the MSR or the Scanner.

Repeat steps 3 to 8 for all keyboard wedge keys you want to set up.

4.1.8   Setting up Line Displays

In LS POS you can set up a line display for each hardware profile you are using.

To Set up Line Displays:

1. Click **LS Easy - Setup, POS Setup, POS Profiles, Hardware**.
2. Browse to the relevant hardware profile and click the **Line Display** tab.
3. If using an **OPOS** driver, select the *OPOS* option in the **Display** field.
4. If the *OPOS* option was selected in the **Display** field, you must enter the OPOS driver name for the line display here. Both the Programmatic ID and the Logical Device Name can be used as the Device Name for the line display. You can find the Programmatic ID and the Logical Device Name in the registry: *HKEY_LOCAL_MACHINE\SOFTWARE\OLEforRetail\ServiceOPOS\LineDisplay.*
5. Fill in other fields as needed.

4.1.9 Tender Handling

LS Retail POS writes POS Transactions plus related lines (Sales, Payments etc.) into the transactions tables. You can also create item ledger/value entries directly if required. You use the Statement to bring transaction data into 'Navision Standard Entries'. Since payments on the POS involve human input, mistakes can happen such as giving wrong change to customers. Therefore, it is necessary to count tender types in order to post the actual amount into the G/L or Bank entries by tender type and to post the counting difference into a difference account.

The counting can be done on the POS terminal and within the statement. When the counting is done on the POS, the counted amount comes into the statement when calculated. On the POS, the counting is always done by tender type while in the statement we have the additional filtering according to the statement method 'By Staff', 'By POS Terminal' or 'Total'.

When a cashier has an own tray for the drawer, the counting is 'By Staff'. When cashiers share a drawer/tray, the counting is 'By POS Terminal' or 'Total'. On the POS the counting method is called 'blind counting' which means that the cashier does not know how much tender should be in the drawer. The cashier could print an X-Report to see the values if he has the staff privileges to do so. But this would spoil the benefits of blind counting. In the statement, the system shows the counting difference. As a procedure, the statement can be posted at the store or at the head office, both with benefits and disadvantages.

The recommended way of posting the statement in a 'distributed database environment' is to post at the head office. There are three types of tender operation functions on the POS:

1. **Float Entry** – this is to put money into the drawer for having change. This must not be understood as being an income which is a different functionality.
2. **Remove tender**, often called 'Pick Up' – this is to take money out of the drawer. This must not be understood as being an expense which is a different functionality. In both cases 1 and 2 the tender is posted against the safe on cash management level and against the 'tender add/remove' tender type for further account posting.
3. **Cash Declaration** (Tender declaration) – this is to declare how much of the tender is in the drawer.

A typical procedure during a day would be:

Function	Amount	Balance
Float Entry	1.000	1.000
Sales	50.000	51.000
Remove Tender/Pick Up	20.000	31.000
Tender Declaration	31.000	

4.1.10 How to Archive Transactions Batch Job

With the Archive Transactions batch job you can archive transactions you do not want to keep in the transaction table: **LS Easy - POS, History, Archive** and **Archive Transactions.** Archiving transactions can dramatically reduce the size of your database if you have a lot of sales data. You can run this batch periodically to minimize the number of transactions. You can restore transactions from the archive as needed by running the Restore Archived Transactions batch job.

Note that the batch only archives transactions that have already been included in a statement and posted. Unposted transactions are ignored.

To Archive Transactions:

1. Click **LS Easy - POS, History, Archive** and **Archive Transactions.**
2. Specify filters as needed (see below) and click on **OK.**

You can add restrictions to the batch by using filters on specific fields. You can also select additional fields to specify filters for.

To Specify Filters:

1. Click **LS Easy - POS, History, Archive** and **Archive Transactions.**
2. In the **Field** column, click in an empty field or press **F3**, and then select the relevant field(s).

You can set filters on any of these fields. If you do not set any filters, the batch will include all your records that have already been posted.

To filter the information in the batch, in the **Filter** field, fill in the relevant information as follows. Under the **Transaction Header tab** in the field **Date** you enter the creation date of the transactions you want to include in the batch job. If the field is not filled in, all transactions will be included.

Click the up-arrow at the lower left-hand corner of the window to see the result of the filters you have defined for the table.

To start the batch job, click the **OK** button.

4.1.11 Restore Archived Transactions Batch Job

With the Restore Archived Transactions batch job you can restore transactions you have archived by running the Archive Transactions batch job, see 4.1.10.
You can add restrictions to the batch by using filters on specific fields. You can also select additional fields to specify filters for.

To Restore Archived Transactions:

1. Click **LS Easy - POS, History, Archive** and **Restore Archived Transactions.**
2. Specify filters as needed (see below) and click on **OK.**

To set filters:

1. Click **LS Easy - POS, History, Archive** and **Restore Archive Transactions.**
2. In the **Field** column, press **F3**, click the **AssistButton** and then select the relevant field(s).

You can set filters on any of these fields. If you do not set any filters, the batch will include all your records.

Archived Transaction Header tab

• **Date**: Enter the creation date of the transactions you want to include in the batch job. If the field is not filled in, all transactions will be included.

Click the up-arrow at the lower left-hand corner of the window to see the result of the filters you have defined for the table.

To start the batch job, click the **OK** button.

4.2   Offers

4.2.1   Creating Deals

Deals are sold directly to a consumer. The items belong from the beginning to the Deal and will not get periodic discounts on top of that. Deal lines are of type item and menu. Selling the Deal will insert the item lines and pop up the menus putting items from them into the Deal (for example have a soda menu to define the type sold).

To Create a Deal with Items:

1. Click **LS Easy – BackOffice, Offers, Deal.**
2. In the **Deal** window displayed press **F3** to create a new empty deal.
3. Enter a **Description** of the deal.
4. Select the **Price Group** the deal will be in.
5. Choose whether Deal Lines should be visible in the POS by selecting **Yes** or **No** in the **Show Deal Lines** field. The **Deal header** is always visible. This applies to the items in the **Deal**.
6. Decide the **Deal Price** by entering a price in the **Deal Price** window**.**
7. Select at least two items that will make up the deal by entering values in the lines under the header.
8. Click **Enable** to activate the deal.

4.2.2   Adding a Deal to a Menu Profile

Menu profiles are used to setup menus that are to appear on the POS terminal screen. These are controlled either by soft keys on the side of the screen or, in case of a touchscreen, by touch. Each menu item has many properties that are used to control the look, layout, functionality and access to the button depending on various criteria.

Prerequisites:
- Create a deal only with items - see 4.2.1.
- Create a deal with items as well as a PLU menu - see 4.2.3.

To add a deal to a menu profile:

1. Click **LS Easy - Setup, POS Setup, POS Profiles, Menu**.
2. In the **Menu Profile** window press **F5** to get a list of all menu profiles.
3. Select a **Menu Profile** that has a value in **Sales Menu**.
4. Drill down into the **Sales Menu** (button with arrow pointing down)
5. Add a new line.
6. Type in a **Description**.
7. In the field **Command** select the command *DEAL*.
8. In the field **Parameter** select one of the deals created before.

4.2.3   Creating Deals with the PLU Menu

1. Click **LS Easy - Setup, POS Setup, POS Profiles**, **Menu**.
2. On the **Menu Profile** card press **F5** to get a list of all menu profiles.
3. Select a **Menu Profile**.
4. Click **Profile** and select the **Menu Editor**.
5. In the **Menu Editor** window press **F3** to create a new menu.
6. Type in **Menu ID**, select **Menu** in **Menu Type** and type in a description.
7. In the grid add a few items that will be a part of the menu.
8. Click **LS Retail – BackOffice, Offers, Deal**.
9. In the **Deal** window displayed press **F3** to create a new empty deal.
10. Type in a **Description** of the deal.
11. Select the **Price Group** the deal will belong to.
12. Choose whether Deal Lines should be visible in the POS by selecting **Yes** or **No** in the **Show Deal Lines** field.
13. Decide the **Deal Price** by entering a price in the **Deal Price** window.
14. Select the same **Menu Profile** as you did in step 3.
15. In the lines under the header select at least two items that will make up the deal.
16. In the last line select **PLU Menu** in the field **Type**.
17. In the field **No**. select the menu created in previous steps.
18. Click **Enable** to activate the Deal.

4.2.4   Deal Functionality in POS

Deals are sold directly to a consumer. The items belong from the beginning to the Deal and will not get a periodic discount on top of that. Deal lines will be of type item and menu (instead of product groups). Selling the Deal will insert the item lines and pop up the menus putting items from them into the Deal (for example have a soda menu to define the type sold).

Prerequisites:
*   Create a deal only with items
*   Create a deal with items as well as a PLU menu.
*   Add a deal to a button either using menu profile or button properties.
*   POS Local Setup has been set to view a POS using the Menu profile used when creating the deals.

To Add a Deal Using Button Properties:

1. Click **LS Retail – POS, POS Client.**
2. Log on to the POS.
3. Right click a button and select **Properties.**
4. Select the **General** tab.
5. Description will be the text displayed on the button.
6. Select the Command **DEAL**.
7. Select a deal previously created as **Parameter**.
8. Click **OK**.

4.2.5   Creating Promotions

You can sell retail items at a discount price for periods of time by including them in Promotions. The Promotion acts like a price change for the POS in the way that no discount is shown on the receipt and it does not affect other discounts like Infocode discount, Mix & Match, Multibuy or Discount offer. Each item can only be in one enabled Promotion.

To create Promotions:

1. Click **LS Easy - BackOffice, Offers, Promotion**. The **Promotion** window appears.
2. Press **F3** to create a new Promotion
3. Fill in the **Description** and **Price Group** fields.
4. In the **Disc.% from Std.** Price field, insert the discount % given by defaults to the items in Promotion.
5. If you want to set limits on the validation period for the Promotion: On the **Validation Period** tab, fill in the **Disc. Validation Period ID** field to determine the validation period for the offer.
6. In the **Item No.** field, select the **Item** or **Product Group**.
7. If needed, change the default value in the **Disc.%** field.
8. If you want to activate the offer now, click the **Enable** button on the form.

Repeat steps 6-7 for each item.

> **Note** - Once you have set up a Promotion, you need to change its status from *Disabled* to *Enabled* in order for it to be valid at the POS terminals. If the POS terminals are online, the items belonging to this group will have new unit prices as soon as the offer has been enabled. If the POS terminals are not online, the new unit prices will be valid as soon as replication of the enabled offer has taken place. you can change the status from disabled to enabled, and back to disabled as often as needed.
>
> VAT calculations in offers use the **VAT Bus. Posting Gr. (Price)** from the price group to find the appropriate VAT %
>
> Promotion can not be changed while its status is enabled. You can delete a disabled discount offer, but you must be aware of the consequent loss of statistical information.

4.2.6 Creating Discount Offers

You can sell retail items at a discount price for periods of time by including them in discount offers. You can also sell all retail items in selected Product Groups or Item Categories with a percentage discount by including the Product Groups in discount offers. It is also possible to include all items in the store in a discount offer. In some cases it may be more convenient to include entire Product Groups, departments etc. in offers and then make exceptions, which is possible in LS Easy.

To Create Discount Offers:

1. Click **LS Easy - BackOffice, Offers, Discount Offer**. The **Discount Offer** window appears.
2. Press **F3** to create a new Discount Offer.
3. Fill in the **Description**, and **Price Group** fields.
4. In the **Disc. % Value** field, insert the discount percentage given by default to the Items, Product Groups and/or Item Categories in the offer.
5. If you want to set limits on the validation period for the offer; On the **Validation Period** tab fill in the **Disc. Validation Period ID** field to determine the validation period for the offer.
6. In the offer lines, fill in the **Type** field to determine if the offer is valid for an Item, a Product Group, Item Category or All .
7. In the **No**. field, select the number according to your choice in step 6.
8. If needed, change the default value in the **Disc.%** field.
9. If you want to activate the **Discount Offer** now, click on the **Enable** button.

Repeat steps 6 to 8 for each Item, Product Group or Item Category you want to include in the discount offer.

Attention

>   Once you have set up a periodic offer, you need to change its status from *Disabled* to *Enabled* in order for it to be valid at the POS terminals. If the POS terminals are online, the discount offer on items belonging to this group will be activated as soon as the offer has been enabled. If the POS terminals are not online, the discount offer will be valid as soon as replication of the enabled offer has taken place. You can change the status from *Disabled* to *Enabled* and back to disabled as often as needed. If an item is included twice in the same Discount Offer, the more specific grouping of the item will take priority. For example, a store may offer a discount on all items except cosmetics. Then the settings for the group Cosmetics (specific) overrule the settings for All Items (general) as far as items in the cosmetics department are concerned.
>   A periodic offer can be changed while its status is enabled. You can delete a disabled discount offer, but you must be aware of the consequent loss of statistical information.
>   VAT calculations in offers use the **VAT Bus. Posting Gr. (Price)** from the price group to find the appropriate VAT %
>   An Item can be valid in many periodic offers at the same time (Mix & Match, Multibuy Discount). In that case, the user has to define priority for the offers for the system.

4.2.7 Creating Multibuy Discounts

As the name suggests, a Multibuy Discount offer gives different levels of discounts based on the number of Items the customer buys. In other respects it works in ways similar to the Discount Offer. You can either define a new unit price or a percentage discount when a certain number of items has been sold, and set a further discount with an increasing number of items.

When you set up Multibuy Discounts, you can assign Multibuy Discount groups to retail items.

To Create Multibuy Discounts:

1. Click **LS Easy - Backoffice, Offers, Multibuy Discount.**
2. Press **F3** to create a new **Multibuy Discount** offer.
3. Fill in the **Description** and **Price Group** fields.
4. On the **Store Group** tab you select the store groups where the promotion shall be distributed to.
5. In the **Discount Type** field select whether the offer triggers a new unit price, or a discount.
6. If you want to set limits on the validation period for the offer - on the **Validation Period** tab fill in the **Disc. Validation Period ID** field to determine the validation period for the offer.
7. In the **Configuration** tab, fill in the **Min. Quantity** to determine the minimal quantity needed to trigger the **Multibuy Discount** offer.
8. Fill in the **Unit Price/Disc. %** field with either the new *unit price* or the *discount* given, according to the option selected in the **Discount Type** field on the **General** tab.
9. In the item list fill in the No. of the item which shall be in the **Multibuy Discount**.
10. If you wish to activate the offer now, click the **Enable** button on the form.

Repeat steps 6 and 7 for each range of minimal quantity you want to add to the Multibuy Discount offer.

An Item can be valid in many periodic offers. In that case, the user has to define priority for the offers for the system.

4.2.8 Creating Mix & Match Offers

Retail Items and Product Groups, can be included in Mix & Match offers to allow discounts when buying a specific quantity and/or combination of goods.

An example of a Mix & Match offer is a group of four items, two different types of soda, a bag of potato chips and one candy bar, where the customer gets the candy bar for free if he buys one of either types of soda and the bag of chips.

When you set up a Mix & Match group, you need to define how the discount should be configured and choose the Items or Product Groups, which are included. This involves setting the price or percentage discount, finding a descriptive name and setting up how many items are needed for the discount to take effect.

Types of Mix & Match offers

There are three types of Mix & Match offers:
- A certain number of items in the Mix & Match offer is sold for the *price* or *discount* defined by the group as a whole, the total price or discount is always the same.
- Each item in the Mix & Match group has an *individual discount* or a *deal price* applied if a certain quantity of the item is sold. The total price varies depending on which item is sold.
- The least expensive constituent line of the Mix & Match group is free, enabling you for example to give a *two for the price of one* discount

To Create Mix & Match Discounts:

1. Click **LS Easy - BackOffice, Offers, Mix & Match**.
2. Press **F3** to create a new Mix & Match offer.
3. Fill in the **Description** and **Price Group** fields.
4. On the **Store Group** tab you select the store groups where the promotion shall be distributed to.
5. On the **Configuration** tab, select the **Discount Type** by setting one of the Radio Buttons to determine the discount type.
6. If you want to set limits on the validation period for the offer; On the **Validation Period** tab fill in the **Disc. Validation Period** field to determine the validation period for the offer.
7. In the offer lines, in the **Type** field, select the **Item** or **Product Group** you want to include in the offer.
8. Fill in the **No**. field.
9. In the field **Variant Code** you can select a specific variant for an item.
10. Enter the necessary information in each line, for example determining, in the **Line Group** field, which line group the line belongs to. You can set up different line groups by doing a Lookup on the **Line Group** field. For a better overview you can assign colors to the line groups.
11. In the **No. of Items Needed** field you define how many items are needed to fulfill the **Mix & Match**.
12. If you have selected the discount type **Line spec.** for the **Mix & Match**, you can set the discounts or prices per line.
13. If you want to activate the offer now, select the **Enable** option in the **Status** field on the **General** tab.
14. If you want to activate the offer now, press the **Enable** button.

Repeat steps 7 to 12 for each Item or Product Group you want to include in the mix & match offer.

Attention

Once you have set up a periodic offer, you need to change its status from *Disabled* to *Enabled* in order for it to be valid at the POS terminals. If the POS terminals are online, the items belonging to this group will have new unit prices as soon as the offer has been enabled. If the POS terminals are not online, the new unit prices will be valid as soon as the replication of the enabled offer has taken place. You can change the status from *Disabled* to *Enabled*, and back to *Disabled* as often as needed. A periodic offer can not be changed while its status is enabled. You can delete a disabled discount offer, but you must be aware of the consequent loss of statistical information.

VAT calculations in offers use the **VAT Bus. Posting Gr. (Price)** from the price group to find the appropriate VAT %

An Item can be valid in many periodic offers. In that case, the user has to define priority for the offers for the system. (See 4.2.10.)

4.2.9   Setting up Discount Periods

You can set up three types of periodic offers in LS Retail:

- **Multibuy Offer**
- **Discount Offer**
- **Mix & Match Offer**

Before you set up periodic offers, you must set up periods when the offers are valid. Then you can assign validation periods to periodic offers.

You can limit the validation period from a date to a date, to specific days of the week, to times of the day, or to a combination of these limiting factors.

If you do not set up a discount validation period and assign it to discount offers, the discount offers are always valid.

To Set up Discount Periods:

1. Click **LS Easy – Setup, BackOffice Setup**, **Discount Period Setup**. The **Discount Period Setup Card** window appears.
2. Fill in the **ID** and **Description** fields.
3. If you are setting up a validation period, valid at all times, you should not fill in more fields
4. If you want to set limit on the start and ending date of the periodic offers, fill in the **Starting Date** and **Ending Date** fields. Notice that if you remove the check mark in the **Time within Bounds** field, the offers are valid not within but outside of the starting and ending time.
5. If you want to set limit on the weekdays the offer is valid, fill in the relevant fields for each tab with a name of a weekday.

4.2.10   Changing the Priority of Offers

The three types of Periodic Offers - Discount Offers, Multibuy Discount and Mix & Match - get a priority number. By default they get lowest priority at creation time (highest priority number).

To change the priority of an Offer:

1. Click on the arrow in the **Priority** field in the relevant offer window to open the **Periodic Disc. Priority** window. This is where all overlapping offers are displayed.
2. Select the offer you want to change the priority of and click on the **Change Priority** button to open the **Overlapping Offers** window.
3. The selected offer is now shown in red. (The blue lines are offers that are also displayed in the **Periodic Disc. Priority** window. Use the arrow key at the bottom of the window to move the offer up and down to requested position. (See **Overlapping Offers** for more information).
4. Close the window.

4.3   Menus

4.3.1   Setting up Menus

Menus are controlled either by the menu keys on the side of the screen or, in the case of a touch screen, by the screen itself.
For a menu, you set up menu keys, which are dynamic keys that appear on-screen and change during run time. You can set up numerous menu key menus for each hardware profile you are using.

To Set up Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu.** The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profiles, Menu Editor**, and the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field select the menu type *Menu*.
6. In the **Map Enter To** field you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field you can insert a parameter for that command.
7. In the **Key No.** field in the menu lines, insert a number of a defined menu key as set up in the **POS Key Command** window.
8. Fill in the **Description** and **Command** fields as desired.

Repeat steps 7 and 8 for each menu line you want to include in the menu.

Example
> In Sales menus, the **Map Enter To** field can have the **ITEMNO** command selected. This means that when a value is entered and the **Enter** key pressed on the sales menu, the program will recognize the value inserted as an item number.

4.3.2 Setting up Start Menus

You must set up a start menu for each POS visual profile you are setting up.

To Set up Start Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profile**, **Menu Editor**, and the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field select the menu type *Menu*.
6. The **Menu Caption** field should have a descriptive prompt for the user to select a mode, for example; *Select Command*.
7. In the **Map Enter To** field preferably select the ITEMNO command. If so; leave the **Map Parameter** field blank.
8. In the **Key No**. field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
9. Fill in the **Description** and **Command** fields as desired. The following commands are often used in the start menu:
- LOGOFF
- START
- REFUND
- VOID_TR
- SUSPEND

It is also recommended to run the tender operation menu from the start menu.

Repeat steps 8 and 9 for each menu line you want to include in the menu.

4.3.3 Setting up Sales Menus

You must set up a sales menu for each POS visual profile you are setting up. On the sales menu, you define the items or sales available at the POS terminal.

To Set up Sales Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profile, Menu Editor**, and the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field, select the menu type *Menu*.
6. In the **Map Enter to** field, preferably select the ITEMNO command. If so; leave the **Map Parameter** field blank.
7. In the **Key No**. field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** and **Command** fields as desired. The following commands are often used in the sales menu:
- INCEXP
- PLU_K
- LOOKUP

Repeat steps 7 and 8 for each menu line you want to include in the menu.

4.3.4   Setting up Payment Menus

You must set up a payment menu for each POS visual profile you are setting up. On the payment menu, you define the tender types you want to post a payment into.
If you are setting up currencies, payment into customer account, or predefined amount, look for related topics for help.

To Set up Payment Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profiles, Menu Editor**, and the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field select the menu type *Menu*.
6. In the **Map Enter To** field you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field you can insert a parameter for that command.
7. The **Menu Caption** field should have a descriptive prompt for the user to select a mode, for example; *Select Payment*.
8. In the **Key No**. field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
9. Fill in the **Description** and **Command** fields as desired. The following commands are often used in the payment menu:
- TENDER_K
- CURR_K

Repeat steps 8 and 9 for each menu line you want to include in the menu.

4.3.5   Setting up Customer Payment Menus

You can set up a menu to pay into a customer's account, or include the menu lines in predefined menus.

You can also set up menu lines to register a customer's sale, without registering a payment into his account. This can be useful if you want to collect data about a sale to the customer or give him customer specific prices and discounts.

Before you can run customers at the POS terminals and before registering into customers accounts, you must have set up a lookup form for customers.

To Set up Customer Payment Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profiles, Menu Editor**, and the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field, select the menu type *Menu*.
6. In the **Map Enter To** field, you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field, you can insert a parameter for that command.
7. In the **Key No.** field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** field.
9. In the **Command** field, select the MENU function.
10. In the **Parameter** field, select CUSTOMER lookup.
11. In the **Post Command** field, select the *TENDER_K* function.
12. In the **Post Parameter** field, select the tender type to which you want to post into.

If you want to register a sale into a customer account without posting payment into his account, follow steps 1 to 8 and then this procedure:

9. In the **Command** field, select the AMOUNT_K function.
10. In the **Parameter** field, insert the amount of zero.
11. In the **Post Command** field, select the TENDER_K function.
12. In the **Post Parameter** field, select the tender type to which you want to post into.

Repeat steps 7 to 12 for each menu line you want to include in the menu.

4.3.6   Setting up Currency Menus

You can set up menus that define currency, when you receive payment in currency and want to post it into a currency account.

To Set up Currency Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profile, Menu Editor**. The **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field, select the menu type *Menu*.
6. In the **Map Enter To** field, you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field, you can insert a parameter for that command.
7. In the **Key No.** field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** field.
9. In the **Command** field, select the TENDER_K function.
10. In the **Parameter** field select the tender type into which you want to post.
11. In the **Post Command** field select the CURR_K function.
12. In the **Post Parameter** field select the currency that you want to which account you want to post.

Repeat steps 7 to 12 for each menu line you want to include in the menu.

4.3.7   Setting up Lookup Menus

Lookup menus are used for looking up records in predefined tables during runtime operations. You must set up one lookup menu for each visual profile.

Before setting up lookup menus, you must also set up one lookup in your business. The lookup is set up for all tables you want the lookup menus to act upon.

To Set up Lookup Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profiles, Menu Edito**r, the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field select the menu type *Menu*.
6. In the **Map Enter To** field you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field you can insert a parameter for that command.
7. In the **Key No**. field in the menu lines, insert a number of a defined menu key as set up in the **POS Key Command** window.
8. Fill in the **Description** and **Command** fields as desired. The following commands are recommended in the lookup menu lines:
   * OK
   * MENU Parameter: Name of search menu
   * TOUCHKEYB
   * PAGE_UP
   * PAGE_DN
   * GO_FIRST
   * GO_LAST
   * CANCEL

Repeat steps 7 and 8 for each menu line you want to include in the menu.

Attention

> Running a search menu from the lookup menu is recommended.

4.3.8   Setting up Search Menus

You must set up one search menu for each visual profile. Search menus are used for searching for items, such as retail items, customers or variants on the POS terminals.

To Set up Search Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profile, Menu Editor**, the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field select the menu type *Menu*.
6. In the **Map Enter To** field you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field you can insert a parameter for that command.
7. In the **Key No.** field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** and **Command** fields as desired. The following commands and parameters are often used in the search menu:
   * *OK*
   * *FIND* ..G
   * *FIND* H..M

- *FIND* N..R
- *FIND* S..
- *FINDNO*
- *FINDNAME*
- *LASTMENU*

Repeat steps 7 and 8 for each menu line you want to include in the menu.

4.3.9 Setting up Tender Operation Menus

On the tender operation menu you define the tender operations available at the POS terminal. A tender operation menu must be set up to the visual profile assigned to the POS terminal, before you run tender operations from there.

To Set up Tender Operation Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profiles, Menu Editor**, the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field select the menu type *Menu*.
6. In the **Map Enter To** field you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field you can insert a parameter for that command.
7. In the **Key No**. field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** and **Command** fields as desired. The following commands are often used in tender operation menus:
- TENDER_D
- FLOAT_ENT
- REM_TENDER
- OPEN_DR

Repeat steps 7 and 8 for each menu line you want to include in the menu.

4.3.10 Setting up Price Control Menus

You can set up a price control menu on which you can define functionality for price change and price check.

To Set up Price Control Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profile, Menu Editor**, the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field select the menu type *Menu*.
6. In the **Map Enter To** field you can select a POS command to run when pressing the **Enter** key. In the **Map Parameter** field you can insert a parameter for that command.
7. In the **Key No.** field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** and **Command** fields as desired. Following commands are often used in price control menus:
- PRICECHK
- PRICECH
- DISCPR

- DISCAM
- TOTDISCPR
- TOTDISCAM
- AMOUNT_K

Repeat steps 7 and 8 for each menu line you want to include in the menu.

For Help about a specific POS command look up the POS Commands in the Online Help.

4.3.11 Setting up Predefined Amount Menus

You can set up a predefined amount menu for the tender types you are setting up in a menu. When a predefined amount menu line is triggered a fixed payment amount for a particular tender type is selected as a payment.

To Set up Predefined Amount Menus:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profiles, Menu Editor**, and the **POS Menu** window appears.
3. Press **F3** to create a new menu.
4. Fill in the **Menu ID** and **Description** fields.
5. In the **Menu Type** field select the menu type *Menu*.
6. In the **Map Enter To** field you can select a POS command to run when pressing the *Enter* key. In the **Map Parameter** field you can insert a parameter for that command.
7. In the **Key No**. field in the menu lines, insert the number representing the order of the key on the POS terminal screen.
8. Fill in the **Description** field.
9. In the **Command** field, select the AMOUNT_K function.
10. In the **Parameter** field, insert the amount that you want to be used automatically.
11. In the **Post Command** field, select the TENDER_K function.
12. In the **Post Parameter** field, select the tender type you want to be used automatically.

Repeat steps 7 to 12 for each menu line you want to include in the menu.

4.3.12 Setting Properties for Menu Buttons

For each menu key you can set properties such as description, command, font and colors.

To Set Properties for Menu Buttons:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu**. The **Menu Profile Card** window appears.
2. Browse to the relevant profile and click **Profile, Menu Visual Editor**. The **Visual Menu Editor** window appears.
3. For each button you want to set properties for: Double-click the button, and the **POS Button Properties** window appears.
4. Select the button properties as needed.

Attention

You cannot edit buttons in the visual menu editor unless you have set the number of columns and rows in the menu setup.

4.4 Hardware Configuration

4.4.1 Setting up Functionality Profiles

In order to run the POS terminals, you must set up POS functionality profiles and assign them to stores. You can have multiple POS functionality profiles in your system, one for each store. In order to facilitate the setup of functionality profiles, you might consider copying the profile from another functionality profile, and then change the settings.
To minimize setup you might want to consider using the default setup available for system setup.

To Set up POS Functionality Profiles:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Functionality.**
2. Press **F3** to insert a new functionality profile.
3. On the **General** tab, fill in the mandatory field **Profile ID** with a unique identification code for the functionality profile.
4. On the **Amount** tab, the following fields are mandatory: **POS Currency Symbol, Multiple Items Symbol, Amount Rounding To, Amount Decimal Places, Price Rounding To, Price Decimal Places.**
5. Fill in the remaining fields as needed.

Repeat steps 2 to 5 for each POS functionality profile you want to set up.

4.4.2 Setting up Hardware Profiles

One of the tasks you have to carry out when setting up a POS terminal is setting up a Hardware Profile and assign it to the POS terminal.
The hardware profile keeps information about how the program manages the hardware connected to your POS terminal. It contains setup for each of the peripheral devices. These are: the receipt/document printer, customer display, magnetic strip reader, cash drawer, barcode scanner, scale, keylock, keyboard, tone device and connection to an EFT server.
You can set up as many hardware profiles as needed in your business.

To Set up Hardware Profiles:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Hardware**. The **POS Hardware Profile Card** window appears.
2. Press **F3** to create a new hardware profile.
3. Fill in the **Profile ID** and **Description** fields.
4. Fill in the fields in the relevant tabs for each piece of hardware according to your needs.

You can also use default data to set up your hardware profiles.

4.4.3 Setting up Menu Profiles

One of the tasks you have to carry out when setting up a POS terminal is setting up a Menu Profile, and assign it to the POS terminal. The Menu profile keeps information about appearance on the POS terminal, such as colors, menus to run and if certain features should be visible or not on the POS terminal screen.

You can set up as many Menu profiles as needed in your business.

To Set up Menu Profiles

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Menu.** The **POS Menu Profile Card** window appears.
2. Press **F3** to create a new Menu profile.
3. Fill in the **Profile ID** and **Description** fields.
4. Fill in the mandatory fields **Start Menu, Sales Menu, Payment Menu** and **Tender Op. Menu**.
5. For different **Staff Permission Groups** like **Managers** or normal **Cashiers** you can define different menus under the '**Group Menu'** tab. Please note that in case you do not define special menus there, all the cashiers will use the Menus defined under the 'General' tab.
6. Fill in other fields in the window according to your needs.
7. When you have set up a Menu profile you need to assign it to the relevant POS terminal(s) before you can run the terminal.

You can also use default data to set up your Menu profiles.

4.4.4   Setting up Interface Profiles

One of the tasks you must carry out when setting up a POS terminal is setting up an Interface Profile and assign it to the POS terminal. The Interface profile controls the graphical layout of the POS interface, namely the position of various objects (for example the Total button, journal lines, various menu forms), and in general how the POS presents the sale interface to the user.

The POS Interface Profile table contains basic information for the setup of the visual appearance of the POS terminals. You use it to select menus that appear on the POS terminal screen, as well as to define colors and bars visible.

You can have several Interface Profiles in your business. You can select which profile to run on specific POS Terminals in the Interface Profile field in the POS Terminal table.
The standard Unit of Measure for form sizes in Microsoft Dynamics NAV is 1/100 of a millimeter.

To Set up Interface Profiles:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Interface**. The **Interface Profile Card** window appears.
2. Press **F3** to create a new visual profile.
3. Fill in the **ID** and **Description** fields.
4. Select the screen resolution and specific parameters.
5. Select colors for special POS functions and events.
6. Define the other menus.

You can also use default data to set up your visual profiles.

You can use a 'Graphical' Layout Editor for the menu definition:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Interface.** The **POS Interface Profile Card** window appears.
2. Click **Profile**, **Layout Editor.**
3. You can move and resize the menus like in Windows.
4. In order to test the Interface Profile you can click the **'Run'** button.

In the POS Interface Profile Setup window you can copy a selected interface profile to a new profile in order to save time and ensure coherency of POS profiles. You can only copy POS interface profiles between profiles in the same company in the database.

To Copy POS Interface Profiles:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Interface**. The **POS Interface Profile Card** window appears.
2. Browse to the POS profile you want to copy to.
3. In the **POS Interface Profile Card** window, click **Functions**, **Copy Profile**. The **Copy Interface Profile** batch job window appears.
4. In the **Copy from Profile** field, select the profile you want to copy from.
5. Click the **OK** button.

4.5 Infocodes

4.5.1 Setting up Infocodes

Before you can assign infocodes to objects such as customers and retail items, you must set up the Infocodes.

To Set up Infocodes:

1. Click **LS Easy - POS**, **Infocodes**. The **Infocode Card** window appears.
2. Press **F3** to create a new infocode.
3. Fill in the **Code**, **Description** and **Type of Input** fields**.**
4. If the Infocode will prompt the cashier, fill in the prompting message in the **Prompt** field.
5. If input from cashier is required, fill in the **Input Required** field.
6. Fill in the other fields as needed.

4.5.2 Setting up Information Subcodes

You can set up infocodes with a number of predefined inputs called information subcodes. By using information subcodes, the POS terminal system will only accept an input of the type defined by the information subcode.

You can use information subcodes for running objects such as forms or reports. You can also use subcodes for selecting a price, for example when issuing warranties of items. Then you can select a warranty period at the POS terminal, and pay for the warranty with a percentage of the item price according to the warranty period selected.

To Set up Information Subcodes:

1. Click **LS Easy - POS, Infocodes**. The **Infocodes** window appears.
2. Select or set up the infocode you want to set up information subcode for. The option in the **Type of Input** field must be *SubCode*.
3. Click **Infocode**, **Subcodes**. The **Information Subcodes** window appears.
4. Fill in the **Subcode** and **Description** fields.
5. If you want the subcode to run a Navision Object, select the *Run Object* option in the in the **Trigger Function** field. If you want to register a price of an item, select the *Item* option, if you want to run a customer/item discount group select the *Discount Gr.* option.
6. Fill in the **Trigger Code** field according to the option selected in step 5.
7. Fill in the other fields as needed.

Repeat steps 4 to 7 for each information subcode you want to set up for the infocode.

4.5.3 Assigning Infocodes to Customers

You can assign infocodes to specific customers. Before you can assign infocodes to customers you must set up the infocodes.

To Assign Infocodes to Customers:

1. Click **LS Easy - BackOffice, Customer Card**. The Customer Card window appears.
2. Browse to the relevant customer and click **Customer**, **Infocodes**.
3. Press **F3** to insert a new entry.
4. In the I**nfocode Code** field, select the relevant infocode.

Repeat steps 3 and 4 for each infocode you want to assign to the customer.

4.5.4　Assigning Infocodes to POS Terminal Activities

You can assign infocodes to POS activities using the POS functionality profile. When you have assigned POS functionality to a store, every POS terminal in the store has the same infocodes assigned.
When setting up infocodes you can also link an infocode to another infocode, enabling you to have more than one infocode assigned to individual POS activities, such as voiding and returns.
Before you can assign infocodes to POS terminal activities you must set up the infocodes.

To Assign Infocodes to POS Terminal Activities:

1. Click **LS Easy – Setup, POS Setup, POS Profiles, Functionality**. The **POS Functionality Profile Card** window appears.
2. Click **Profile, POS Actions**.
3. In the **Do Action** field select **Infocode.** Go to the **Action ID** field and select the relevant code for your purpose. Fill in the **Message** field if necessary.

4.5.5　Assigning Infocodes to Tender Types

You can assign infocodes to tender types and specific cards. Before you can assign infocodes to tender types you must set up the infocodes.

To Assign Infocodes to Tender Types:

1. Click **LS Easy – Setup, BackOffice Setup, Store Card**.
2. Browse to the relevant store.
3. Click **Store, Tender Types**.
4. Browse to the tender types, to which you want to assign an infocode.
5. Click **Tend. Type, Infocodes**.
6. Fill in the **Infocode Code** field by selecting the relevant infocode.

Repeat step 6 for each infocode you want to assign to the tender type.

Attention

> If you want to assign an infocode to a card, you must carry out the first three steps. Then in step four, browse to the tender type representing cards and then click **Tend. Type**, **Card Setup**. From the **Tender Type Card Setup** window click **Card Setup**, **Infocodes** and assign infocodes to the card from there.

4.5.6　Assigning Infocodes to Retail Items

You can assign infocodes to retail items. This can be useful, for example, if you want the system to prompt for a serial number, or if you want to sell a warranty with the item.
Before you can assign infocodes to retail items you must set up the Infocodes.

To Assign Infocodes to Retail Items

1. Click **LS Easy - BackOffice, Item Card**. The **Item Card** window appears.
2. Browse to an item, to which you want to assign infocodes.
3. Click **Item**, select **POS** and Infocodes.
4. Press **F3** to enter a new infocode.
5. Fill in the **Infocode Code** field by selecting the relevant infocode.
6. Fill in other fields as needed.

Repeat steps 5 and 6 for each infocode you want to assign to the item.

4.5.7   Assigning Infocodes to Income/Expense Accounts

You can assign infocodes to income and expense accounts. Before you assign infocodes to income or expense accounts you must set up the infocodes.

To Assign Infocodes to Income/Expense Accounts:

1. Click **LS Easy – Setup, BackOffice Setup, Store Card.**
2. Browse to the store for which you want to assign infocodes to income/expense accounts.
3. Click **Store, Income/Expense Accounts**.
4. Browse to the account to which you want to assign infocodes.
5. Click **Account, Infocodes**.
6. Fill in the **Infocode Code** field, by selecting the relevant infocode.

Repeat step 6 for each infocode you want to assign to the selected account.
Repeat steps 4 to 6 for each account to which you want to assign infocodes.

5 Variant Framework

5.1 General

5.1.1 Variant Framework Setup

Variant Framework Setup is part of the general retail setup, and allows the user to define framework on how variants are used in LS Retail.
When setting up a variant framework there are minimum configurations that need to be setup and then a more advanced setup can be done for more complex variant use.

Variant Framework Base Values

Before you can start defining the frameworks you want to use, you have to set up the base values on which the frameworks are based:

1. Click **LS Easy - Setup, Backoffice Setup, Item, Variant Framework, Variant Framework Base Values**.
2. In the Variant Framework Base Values top window click in the grid to add a new line to it.
3. The following fields have to be filled:
- **Code**: type in the name of the variant base value identifier: color, size, or style.
4. Click in the bottom window to add valid values for each variant base value identifier.
5. The following fields must be filled:
- **Value**: Type in the valid value for example for color: black, green, orange.
- **Value Type**: Select the selection type for the value, whether the value is optional or default during creation of possible variants.

Variant Framework Code Setup

After defining the base value you can start defining the variant frameworks:

Prerequisites:

A **Barcode Mask** to use must exist.

1. Click **LS Easy - Setup, Backoffice Setup, Item, Variant Framework, Variant Framework Codes**
2. In the **Variant Framework Code Setup** window, click in the grid to add a new line.
3. The following fields must be filled:
- **Framework Code**: Enter a name for the framework, for example men, women, and children.
- **Description**: Enter a description for the framework.
- **Variant Suffix/Sequence No.**: Enter an incremental string for creating a variants base in this framework. This string defines the first variant for each item, for example V001 would give variants V001, V002 and so on.
- **Barcode Mask**: Select the Barcode Mask to use for the framework if the field Barcoding is set as Default. This barcode mask must be of the type barcode mask with No. Series.
4. Click the menu button **Settings/Combinations** to open the value selection window.
5. In the top window click in the grid to add a new line to it.
6. The following field must be filled:
- **Code**: Select the variant base value identifier. The order selection will control the dimension value of the identifier. For example the fist to be added will get dim1 and the second gets dim2 and so on. Other fields are copied from the base value setup, but can be changed for this framework.

7. In the bottom window you can make changes to values settings for this framework, you can even delete some value lines. For example red is not a valid color for this framework.

5.1.2   Variant Framework Base Value Setup – Advanced

Variant Framework Setup is part of the general retail setup. It allows the user to define a framework to manage how variants are used in LS Retail.
When setting up a variant framework there are minimum configurations (see 5.1.1) that need to be made and then an advanced setup can be for more advanced variant use.
Before you can start defining the frameworks you want to use, you must set up the base values on which the frameworks are based:

1. Click **LS Easy - Setup, BackOffice Setup, Item, Variant Framework, Variant Framework Base Values**
2. In the Variant Framework Base Values top window click in the grid to add a new line.
3. The following fields either require input or are optional:
- **Code**: Enter the name of the variant base value identifier, for example color, size, style.
- **Extension**: Enter further identification, for example US color, US size, UK size
- **Include in Variant No.**: Select if the values of the variant are used to create the actual variant code. For example if the color black should be a part of the variant code.
- **Variant Delimiter**: Enter the Variant delimiter for the variant if you choose to use one.
4. Click in the bottom window to add valid values for each variant base value identifier.
5. The following fields either require input or are optional:
- **Value**: Enter the valid value for example for color, black, green, or orange.
- **Value Type**: Select the selection type for the value, whether the value is optional or default during creation of possible variants..
- **Comparison Value**: Enter the Comparison Value to use if you choose to use one.
- **Logical Order**: This field determines the order of display, when the value is shown in the statistical matrix or input forms in Microsoft Navision.
- **Color**: This field controls the color used to view this value in the matrix forms, thus giving the user the option of viewing the actual colors.(Normally only used if the variant dimension is 'Color')

6 Loyalty Management

6.1 General

6.1.1 Setting up a Loyalty Scheme

The **Loyalty Scheme** enables the POS to issue Loyalty Points by Loyalty Card at sale. The customer can then use the loyalty points as payment. Loyalty points can be exported to third party or registered in the LS Easy database. In LS Easy, points can be registered by Card No. or by person.

Prerequisites:

- A **Tender Type** for Loyalty points must exist for the store. The default tender type for Loyalty is 11, with a check mark in the fields **Foreign Currency** and **May Be Used.**
- A **Currency Code** LOY should exist. It is used to set the ratio between total amount and points withdrawn. An example of usage would be: Exchange Rate Amount = 1 and Relational Exch. Rate Amount = 0,5. The exchange rate for LOY to LCY is defined as 50 LCY for 100 LOY (to pay an amount of 50 you will use 100 Loyalty pts).
- **Button** on the POS Payment menu: "Loyalty payment" prompts for amount to pay with points. Command = TENDER_K and parameter = 11, Post command = CURR_K and Post parameter = LOY.
- Optional setup. A button on the **POS Sales** menu for "Loyalty contact" (can be used instead of MSR, for manually typing in Card No.) Command = MSRCARD.

To Set up the Loyalty Scheme:

1. Click **LS Easy - POS, Loyalty Management, Loyalty Scheme Card**
2. In the **Loyalty Scheme** card window press **F3** for creating a new **Loyalty** scheme.
3. The following fields have to be filled:
- **Code**: Type in any descriptive code, such as LOYALTY.
- **Starting Card No.**: Which characters/numbers are at the beginning of the card number.
- **Card No. Length**: How many characters in length the card number is.
- **Card Registration**: Select link to contact. Card can also be only Registered.
- **Expiration Calculation**: By typing in +1Y, the points will expire one year from issue date.
- **Loyalty Tender Type**: Select tender type no 11.
4. Create two **Loyalty Schedule** lines with the fields filled as follows:
- First line: **Type** = Tender, **Basic Calculation** = Amounts and **Points** = 1
- Second line.: **Type** = Tender, **Code** = 11, **Basic Calculation** = Amounts, **Points** = -1

6.1.2 How to Issue Loyalty Points

The Loyalty system enables the POS to issue Loyalty points by Loyalty card at sale. The customer can then use loyalty points as payment. Loyalty points can be exported to a third party or registered in the LS Retail database. In LS Retail points can be registered by Card No. or by person.

Prerequisites:

Loyalty must be set up in the system, see 6.1.1.

To Issue Loyalty Points at Sale:

1. Click **LS Easy – POS, Retail POS.**
2. Log on to the POS.

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3. On the start menu swipe a Loyalty card (or for manual typing in of Card No. press the **Loyalty contact button**).
4. If the contact does not exist, he is created.
5. Finish the sale.
6. To view used points open the **Loyalty Scheme Card**, click on the **Loyalty** button and select **Transactions.** Also on the **Loyalty Contact C**a**rd** you can view the status and use of loyalty points under the **Loyalty** tab.

Issued points or Point summary can be printed on the slip, see 6.1.1.

6.1.3 Loyalty Points as Payment

Loyalty system enables the POS to issue Loyalty points by Loyalty card at sale. Customer can then use loyalty points as payment. Loyalty points can be exported to 3rd party or registered in the LS Retail database. In LS Retail points can be registered by card no. or by person.

Prerequisites:
Loyalty must be set up in the system, see 6.1.1.

To use Loyalty points as payment:

1. Click **LS Easy – POS, Retail POS**
2. Log on to the POS.
3. On the **Start menu** swipe a Loyalty card (or, for manual typing in Card No., press the Loyalty contact button).
4. On the **Payment menu**, press the button. The POS suggests that the whole amount should be paid with Loyalty points. Click **Enter**.
5. Finish the sale.
6. To view used points open the **Loyalty Scheme Card**, click on the **Loyalty** button and select **Transactions.** Also on the **Loyalty Contact C**a**rd** you can view the status and use of loyalty points under the **Loyalty** tab.

Note When the Functionality profile in use has the field "Numeric keypad on tender" = OFF when using loyalty points as payment, press the **Loyalty Button** type in points and press the **Loyalty Button** again. Otherwise a keypad dialog is displayed for typing in the amount.