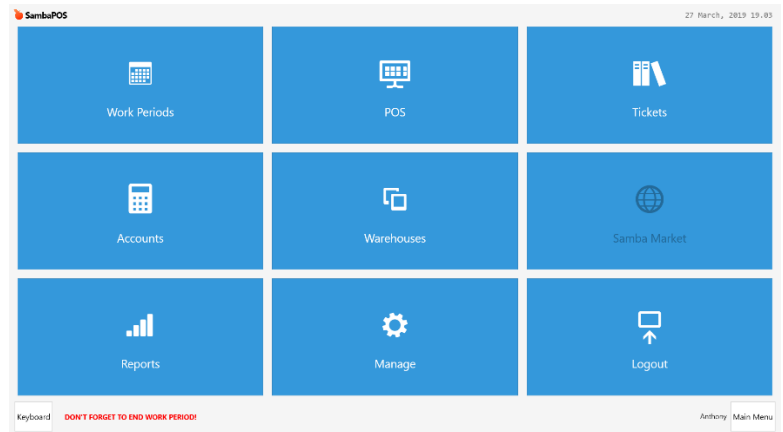


# SambaPOS Staff Training Manual

## 1. Navigation Screen Basics

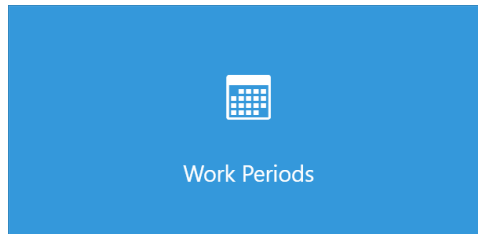
- 1.1. Work Period
- 1.2. POS
- 1.3. Tickets
- 1.4. Accounts
- 1.5. Warehouses
- 1.6. Reports



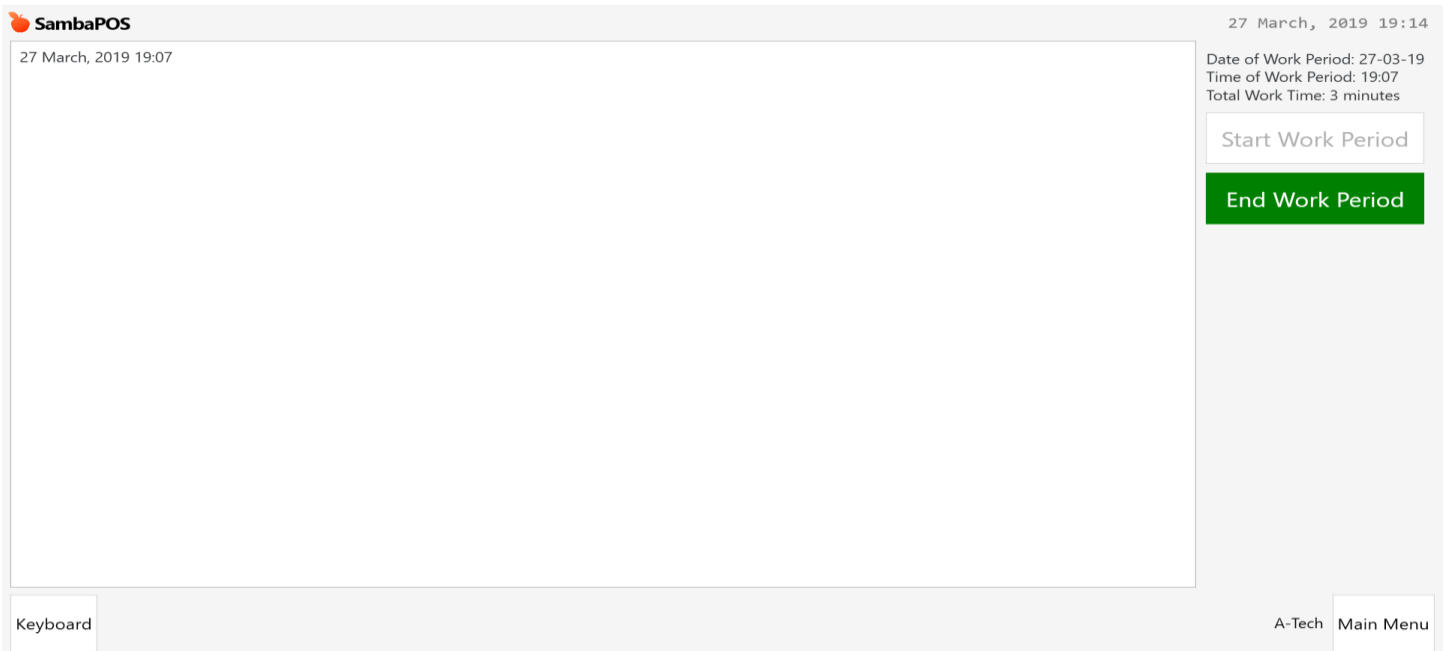
## 2. Manage

- 2.1. Products & Menus
- 2.2. Order Tags
- 2.3. Inventory Items & Inventory Products
- 2.4. Inventory Recipes
- 2.5. Inventory Consumption using Order Tags
- 2.6. Inventory Transactions
- 2.7. Inventory End of Day Records
- 2.8. Accounts, Accounts Screens & Transactions
- 2.9. Entities & Entity Screens
- 2.10. Users
- 2.11. Settings & metriK

# 1.1 Work Period



Work Periods identify your working hours. It simplifies reporting and also useful for tracking periodic inventory changes.



On the left side of the screen we can see past and current work periods.

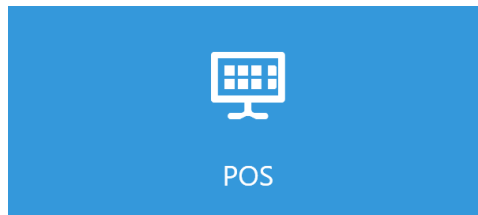
On the right side of the screen we have **Start Work Period** and **End Work Period** buttons which are useful for starting or ending your day/shift. You can also see when it was started and how long was your business open.

POS Screen depends on Work Periods and can only be accessed after you **Start Work Period**.

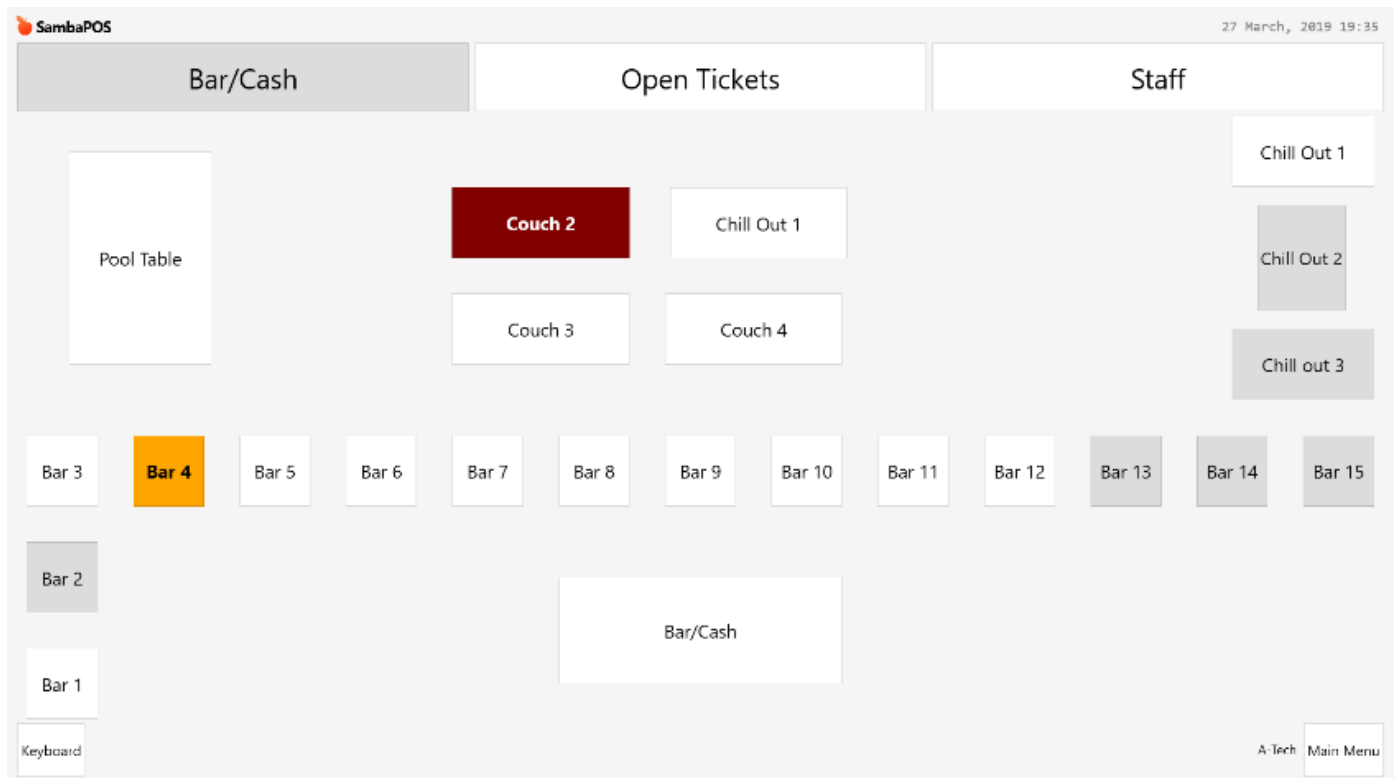
Work Periods separate your daily reports, create End of Day Records and create database backups. Its important to **End Work Period** at the end of every day/shift.

You can only **End Work Period** after all your unpaid tickets have been paid or settled on a customer account.

## 1.2. POS



You can manage sales, orders, entities (tables, customers etc.) and payment processing from this screen.



The POS screen will open your entity screens (table layouts, customers, staff etc). After selecting your Entity, you will access your **Menu Categories**, **Products** within those categories and **Ticket screen**

In SambaPOS you can keep on top of your tickets that are registered through states.

**Orange** indicates the order was submitted and the table is currently occupied.

**Dark Red** indicates that Bill was printed but the ticket hasn't been settled or fully paid yet.

The screenshot shows the SambaPOS interface. At the top left is the SambaPOS logo. The top right shows the date and time: 27 March, 2019 19:58. The main area is divided into several sections:

- Left Panel:** Contains buttons for 'Change Table', 'Select Customer', 'Select SambaCard', 'Ticket Note', 'Print Bill', 'Add Ticket', 'Petty Expense', 'Open Drawer', and 'Keyboard'.
- Ticket Line:** A list of items with their quantities and prices:
 

Item	Quantity	Price
1 Steak BBQ,T-Bone (SUBMITTED, ACTIVE)	1	16.00
1 Ginger Ale (SUBMITTED, ACTIVE)	1	1.00
1 Coke (SUBMITTED, ACTIVE, VOID, LONG WAIT)	1	1.00
1 Coke Zero (NEW, ACTIVE)	1	1.00
1 Kulan Water (NEW, ACTIVE, GIFTMAILED CUSTOMER)	1	2.00
1 Korean BBQ (NEW, ACTIVE)	1	5.00
- Menu Categories:** A grid of categories including Anchor Beer, Angkor Beer, Cambodia Beer, Klang, Coke Zero, Kulan Water, Gift Certificate, BBQ, Soft Drinks, Asian, Coffee/Tea, Tom Yam, Beers, Western, Wine, Pizza, Cocktails, Cigarettes, and Extras.
- Products:** A grid of product images with labels: Chicken Legs, Korean BBQ, BBQ Cevapi, Steak BBQ, Fish BBQ, and Wrap BBQ.
- Bottom Panel:** Shows a 'Balance: 23.00' and buttons for 'Close' and 'Settle'. There are also icons for cash and a Visa card.

Arrows point from the labels below to the corresponding sections in the screenshot:

- Ticket Line:** Points to the list of items.
- Ticket Screen:** Points to the entire main interface area.
- Menu Categories:** Points to the grid of categories.
- Products:** Points to the grid of product images.

**Ticket Line**

**Ticket Screen**

**Menu Categories**

**Products**

Like tickets, orders also contain states which indicate the situation of the order or ticket.

**New** – this order state indicates the order was added recently. Bar and/or Kitchen haven't been notified of this order yet.

**Submitted** – orders were submitted previously. Bar and/or Kitchen already know about this order or it was already served.

**Void** – indicates that the order was cancelled. Bar and/or Kitchen know that the order was cancelled and they return the items/ingredients back to stock.

**Gift** – indicates that order was given for free and doesn't count as sale. Unlike Void, gift decreases the number of items/ingredients out of the stock.

In Ticket screen section you can see certain details of your ticket.

In this example you can see:

Ticket number – # 6  
selected entity – Table: Bar 4  
current status – Status: New Orders

Ticket screen also allows you to see Order number and who made the last order.

Ticket screen also shows total of the ticket, discounts and other calculations.

The screenshot displays a ticket interface with the following details:

- Table: # 6 Table: Bar 4
- Status: New Orders
- Order Number: Ord.No: 7 - A-Tech 15:37
- Order Items:
  - 1 Steak BBQ.T-Bone (SUBMITTED, ACTIVE, Medium) - 16.00
  - 1 Ginger Ale (SUBMITTED, ACTIVE) - 1.00
  - 1 Coke (SUBMITTED, ACTIVE, VOID:LONG WAIT) - 1.00
- New Order Section:
  - 1 Coke Zero (NEW, ACTIVE) - 1.00
  - 1 Kulen Water (NEW, ACTIVE, GIFT:VALUED CUSTOMER) - 2.00
  - 1 Korean BBQ (NEW, ACTIVE, Rice) - 5.00
- Order Timing: Ticket Opening: 15:36 (3135 min.)
- Balance: 23.00
- Buttons: Close (red), Settle (white)
- Payment Options: Cash (stack of bills icon), Visa (card icon)

**SambaPOS**

# 9 Table: Couch 2  
Status: New Orders

Ord.No: 12 - A-Tech 09:25

1	Chicken Legs SUBMITTED, ACTIVE Fries	6.00
1	Steak BBQ.T-Bone SUBMITTED, ACTIVE Fries Medium Rare	16.00
1	Korean BBQ SUBMITTED, ACTIVE Fries	5.00
New Order		
1	Wrap BBQ.Pork NEW, ACTIVE Fries	5.00

Selecting the order on the Ticket Screen we access additional functions.

**+** - is used to increase +1 quantity of the order

**-** - is used to decrease -1 quantity of the order

**Gift** – is used to give the product for free and decrease the stock for that item without counting it as a sale

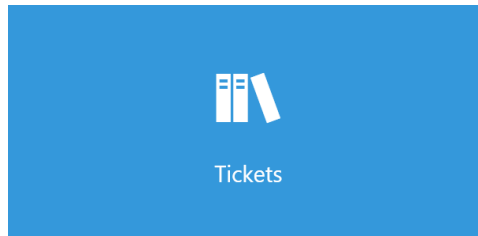
**Void** – is used to cancel already submitted orders and return the items to stock

**Cancel** – is used to cancel new orders due to a miss click or wrong selection

**Move** – selected orders are moved to another ticket but on the same entity (table etc) in case you want to create 2 separate bills for 2 people that sit on the same table

**Change Price** – use the number pad to type in the price, select order and use this function to change the price of it individually

## 1.3 Tickets



In Ticket screen you can find all your tickets and filter them out when necessary.

SambaPOS will use your computer's date for work periods.

Ticket Type	Number	Date	Op-Cls	User	Ticket Note	Total	Suppliers	Deliverer	SambaCard	Table	Customer	Gift Certifi...
Ticket	8	27-03-19	19:33	A-Tech	Ticket	1.00				Couch 2		

1 Ginger Ale 1.00

1 1.00

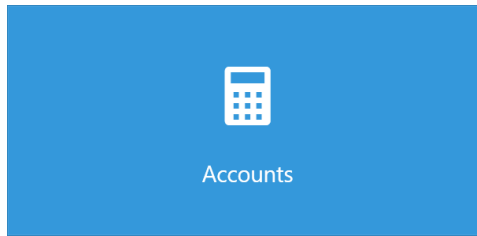
Keyboard A-Tech Main Menu

Inside the Tickets screen you can find a variety of filters and selectors to help you find what you are looking for whether that be a table, ticket number, customer or even a ticket note.

Once you locate your ticket you can press **Display** to see orders inside that ticket. Its possible to **Re-Open Paid Ticket** to make further modifications.

\* **NOTE:** Re-Opening and modifying old paid tickets could result in changes to your already closed Work Periods & reports. \*

# 1.4 Accounts



Accounts can be managed in this section.

SambaPOS 28 March, 2019 13:48

SambaCard Customer Tabs Gift Certificates General Expenses Suppliers

Account Name	Debit	Credit	Balance	Account Details
<b>⊙ Sales Accounts</b>	-	642.00	(642.00)	Print
Sales	-	642.00	(642.00)	
SambaCard Refund	-	-	-	
SambaCard Sales	-	-	-	
<b>⊙ Receivable Accounts</b>	642.05	621.17	20.88	
Receivables	642.05	621.17	20.88	
<b>⊙ Discount Accounts</b>	0.30	0.05	0.25	
Discount	0.30	-	0.30	
Rounding	-	0.05	(0.05)	
<b>⊙ Payment Accounts</b>	612.87	-	612.87	
Bank	-	-	-	
Cash	612.87	-	612.87	
GC Funds	-	-	-	
Voucher	-	-	-	
<b>⊙ Customer Accounts</b>	8.00	-	8.00	
Customer Accounts	8.00	-	8.00	
<b>⊙ GC Balances</b>	-	-	-	
GC Purchases	-	-	-	
GC Redemptions	-	-	-	

Keyboard A-Tech Main Menu

In the Accounts section you can see all your account screens, account types, transactions and details. Like in classic accounting every account has a Debit and Credit and Balance to it.

You can select any account and press **Account Details** which is on the right side of the screen.



Date	Description	Debit	Credit	Balance
28-03-19 13:55	Customer Account Transaction [ATech]	39.50	-	39.50
28-03-19 13:56	Cash - ATech	-	20.00	19.50
28-03-19 13:56	Customer Account Transaction [ATech]	70.00	-	89.50
28-03-19 13:56	Credit Card Payment	-	89.50	-
Grand Total		109.50	109.50	-

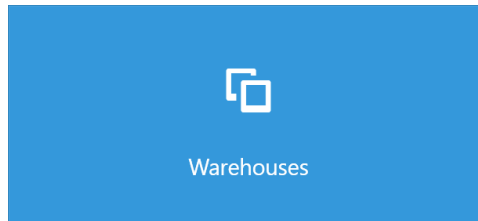
Keyboard

A-Tech Main Menu

This allows you to see time and date stamped transactions. With some Account Types it will also allow you to create additional document transactions.

In this example we can settle Customer account with **Cash** or **Credit Card** document payments. Choosing a transaction line you could also use a function **Find Ticket** to see more details.

# 1.5 Warehouses



You can manage and see warehouses, stocks and consumptions.

SambaPOS 28 March, 2019 14.15

Local Warehouse				Fridge			
Name	Unit	In Stock	Purchase	Cost	Consumption	Inventory Prediction	Display Cost
Cambodia Draught	L	-	21	1.00	-	21	
Klang	Can	-	48	0.36	-	48	
Pilsner Draught	L	-	-	-	-	-	Purchase Transaction
Indochine Draught	L	-	-	-	-	-	
Cider Draught	L	-	-	-	-	-	
Kampot Cider	Bottle	-	-	-	-	-	
Somersby	Bottle	-	-	-	-	-	
Marlboro Gold	Pack	-	-	-	-	-	
Winston Blue	Pack	-	-	-	-	-	
Lighter	PCs	-	-	-	-	-	
Papers	PCs	-	-	-	-	-	
Royal D	Sachet	-	-	-	-	-	
Purple Joss	Sachet	-	-	-	-	-	
Extra Joss	Sachet	-	-	-	-	-	
House Gin	L	-	-	-	0.24	-0.24	
Bombay Gin	L	-	-	-	-	-	
Orange Juice	L	-	-	-	-	-	
Mango Juice	L	-	-	-	-	-	
Cranberry Juice	L	-	-	-	-	-	
Pineapple Juice	L	-	-	-	-	-	
Tomato Juice	L	-	-	-	-	-	
Apple Juice	L	-	-	-	-	-	

Keyboard A-Tech Main Menu

In Warehouses section you can see all your stock items, their measurement units, what is in stock from previous days, recent purchases, cost per unit, consumptions and inventory predictions.

On the right side of the screen you have **Display Cost** button and **Purchase Transaction**.

We will further explain these below.

SambaPOS 28 March, 2019 14:20

Document Number: 28 March, 2019 Description:

Suppliers:

Currency:

Name	Quantity	Unit	Price	Total
Capt Morgan Spiced	2	L	12.00	24.00
	0		0.00	0.00

Close

Add

Delete

Save

`	1	2	3	4	5	6	7	8	9	0	@	⌫
Tab	q	w	e	r	t	y	u	i	o	p	[	]
Caps	a	s	d	f	g	h	j	k	l	;	'	
⬆	z	x	c	v	b	n	m	/	\	Enter		
	-							AltGr	.	,		

Keyboard A-Tech Main Menu

**Purchase Transaction** opens a screen in which we can create stock purchases. In this screen you can have your document number, supplier, currency and description of the purchase.

This screen also has 5 columns by default. Name of the item, quantity you are purchasing, measurement unit (liters, cans, bottles, packages etc.), Price per unit and total price.

On the right side we have 4 buttons.

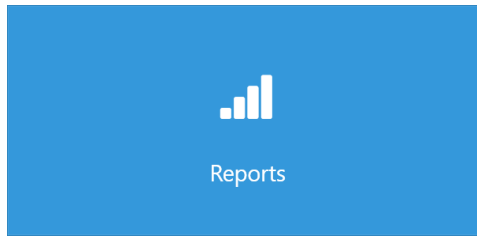
**Close** – Closes the screen and brings you back to your Warehouse screen.

**Add** – Adds a new line for selecting the item you bought from your suppliers, quantity and price.

**Delete** – deletes the selected line.

**Save** – saves the transaction and puts your input in stock.

# 1.6 Reports



In this section you can see and filter all your reports.

**SambaPOS** 28 March, 2019 14:42

**Work Period Report** March 25 2019 09:50 25-03-19 28-03-19 Refresh Print Save

- SambaCard Work Period Report
- SambaCard Transactions
- Group Sales Advanced
- Item Sales Report
- Money Flow Report
- Outstanding Customer Balance
- Customer Transaction Report
- Cash Transactions Report
- Inventory Transaction Report
- Inventory Report Group
- Inventory by Warehouse
- Inventory Report
- Cost Report
- Void & Gift Report
- Settlements by User

**SambaPOS**  
Work Period Report  
25 March, 2019 09:50  
28 March, 2019 14:42

Sales	
Ticket	642.00
Discount	-0.30
Auto Round+	0.05
<b>GRAND TOTAL</b>	<b>641.75</b>

Payments	
Cash	98.70% 609.75
Sean	1.30% 8.00
<b>Total</b>	<b>617.75</b>

Customer Transaction Total	
Total Cash	0.00
Total Credit Card	0.00
<b>Grand Total</b>	<b>0.00</b>

Customer Receivables	
Sean	100.00% 8.00
<b>Total</b>	<b>8.00</b>

Ticket Details		
<b>Ticket Counts</b>		
Ticket	8	641.75
Delivery Ticket	-	-
<b>Total</b>	<b>8</b>	<b>641.75</b>
Amount per Ticket		80.22
<b>Order Counts</b>		
Ticket	36	672.50
Delivery Ticket	-	-

Keyboard **DON'T FORGET TO END WORK PERIOD!** A-Tech Main Menu

On the left side you can see all your reports. Each one of them provides you with different details or summary.

SambaPOS 28 March, 2019 14.46

**Work Period Report** March 25 2019 09:50 - March 28 2019 14:46 - 25-03-19 - 28-03-19 - Refresh Print Save

- SambaCard Work Period Report
- SambaCard Transactions
- Group Sales Advanced
- Item Sales Report
- Money Flow Report
- Outstanding Customer Balance
- Customer Transaction Report
- Cash Transactions Report
- Inventory Transaction Report
- Inventory Report Group
- Inventory by Warehouse
- Inventory Report
- Cost Report
- Void & Gift Report
- Settlements by User

March 25 2019 09:50 - March 28 2019 14:46

Today  
Yesterday  
Past Week  
This Week  
Past Month: February  
This Month: March  
March 25 2019 09:50

Payments		
Cash	98.70%	609.75
Sean	1.30%	8.00
<b>Total</b>		<b>617.75</b>

Customer Transaction Total	
Total Cash	0.00
Total Credit Card	0.00
<b>Grand Total</b>	<b>0.00</b>

Above the visual part of the report we have two kind of filters. This is where you can find your drop down menu for different timelines such as Today, Yesterday, Past Week, This Month etc.

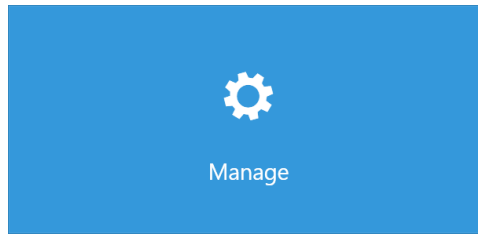
On the right side you have a custom filter in which you can put in your own Start and End date.

**Refresh** – after updating your date filter you can press Refresh and reports will fetch all the information within that date range

**Print** – will print the selected report and date range (ask your reseller if you want to print them in A4 format; you will need a A4 printer)

**Save** – will save a report in an .xps (Windows version of PDF) format

## 2. Manage



This section allows management to change or modify almost every aspect of the POS.

### 2.1 Products & Menus

You can add a new product or change the existing one in Product List. To get there go to **Manage > Products > Product List**

The screenshot shows the SambaPOS interface. The top left corner displays the SambaPOS logo and the date '28 March, 2019 15.12'. The left sidebar contains a navigation menu with 'Product List' highlighted. The main content area shows a 'Product List' window with a search bar and a list of products. The products are grouped into categories: Alcohol (Heineken, Angkor, Tiger, Tiger Crystal, Cambodia, Ouzo No 7), Coffee (Espresso, Double Espresso, Americano, Cafe Latte, Caramel Latte, Caffe Mocha, Cappuccino, Chocolate), Detox (Carrot Cucumber Detox, Cucumber Apple Detox, Carrot Ginger Detox, Red Dragon & Carrots Detox), and Food (Trojan Souvlaki, Souvlaki Sticks Big, Moussaka, Pastichio, Gyros Salad Chips, Keftefes, Chicken Fillet, Single Souvlaki & Chips). On the right side of the product list, there are several action buttons: 'Add Product', 'Edit Product', 'Delete Product', 'Batch Create Products', and 'Change Sort Order'. At the bottom of the interface, there is a 'Keyboard' button on the left and 'Anthony Main Menu' on the right.

On the right side you can [Add Product](#), [Edit Product](#), [Delete Product](#) or [Batch Create Products](#)

Products < Product List x Editing Product (Heineken) x

Product Name: Heineken Group Code: Alcohol

Barcode: Tag:

Portion Prices

Portion	Multiplier	Price
Normal	1	2.00

[Add Portion](#)  
[Delete Portion](#)

Custom Tags

Silver %: Gold %: Platinum %: Staff %: Subtitle:

[Save](#)

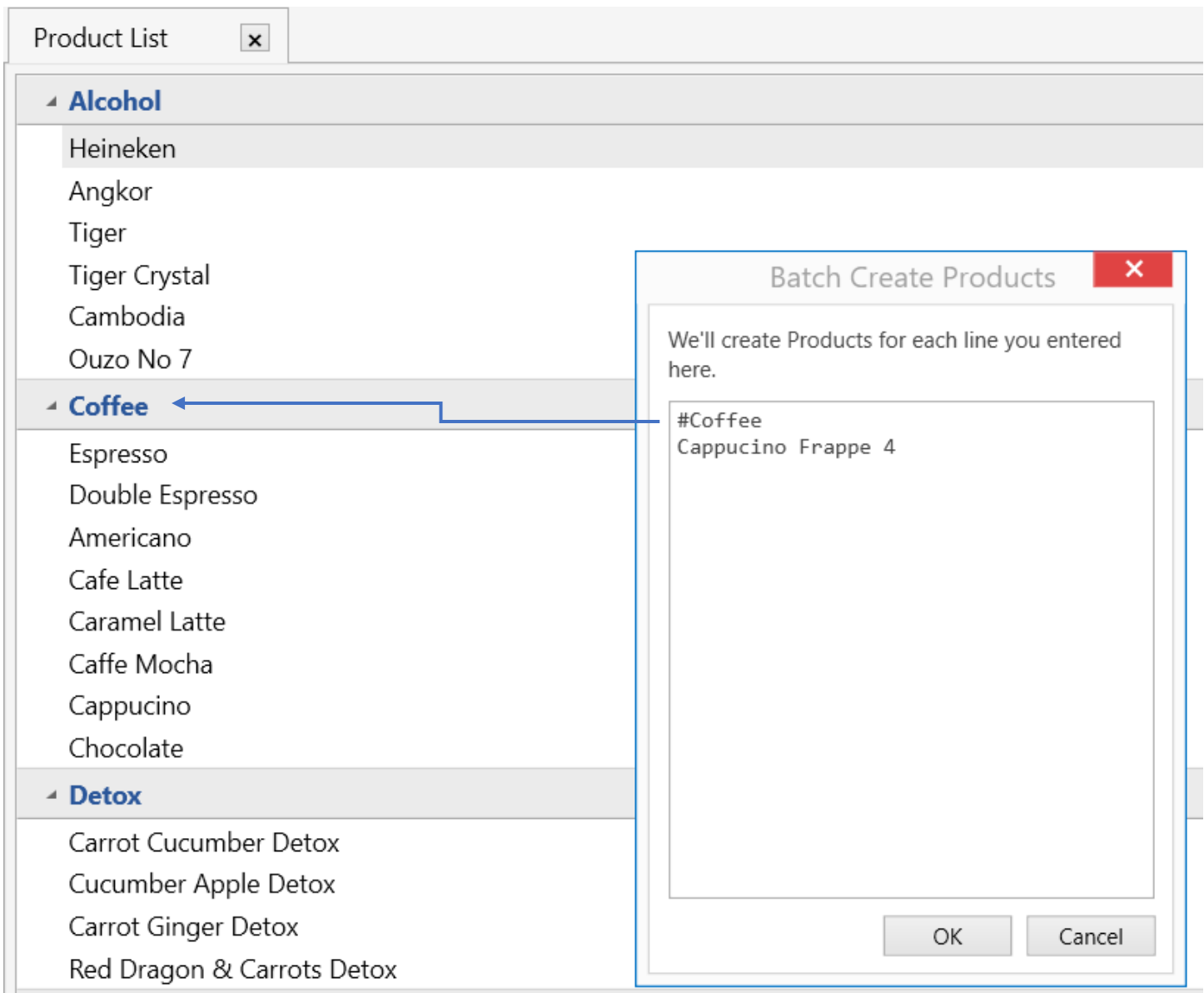
Products

By adding a new product you are declaring that products name, group it belongs to and portion(s).

If you are using barcode scanner you can save the code in the Barcode section.

\* Depending on your setup you might or might not have **Custom Tags**. \*

Press **Save** to create or make changes to the product.



**Batch Create Products** allow you to quickly create a batch of products.

#Coffee – # indicates group it belongs to. If the group doesn't exist, SambaPOS it will create group with that name.

Products are written without the hashtag. Last number in the line will be saved as the price of the product.

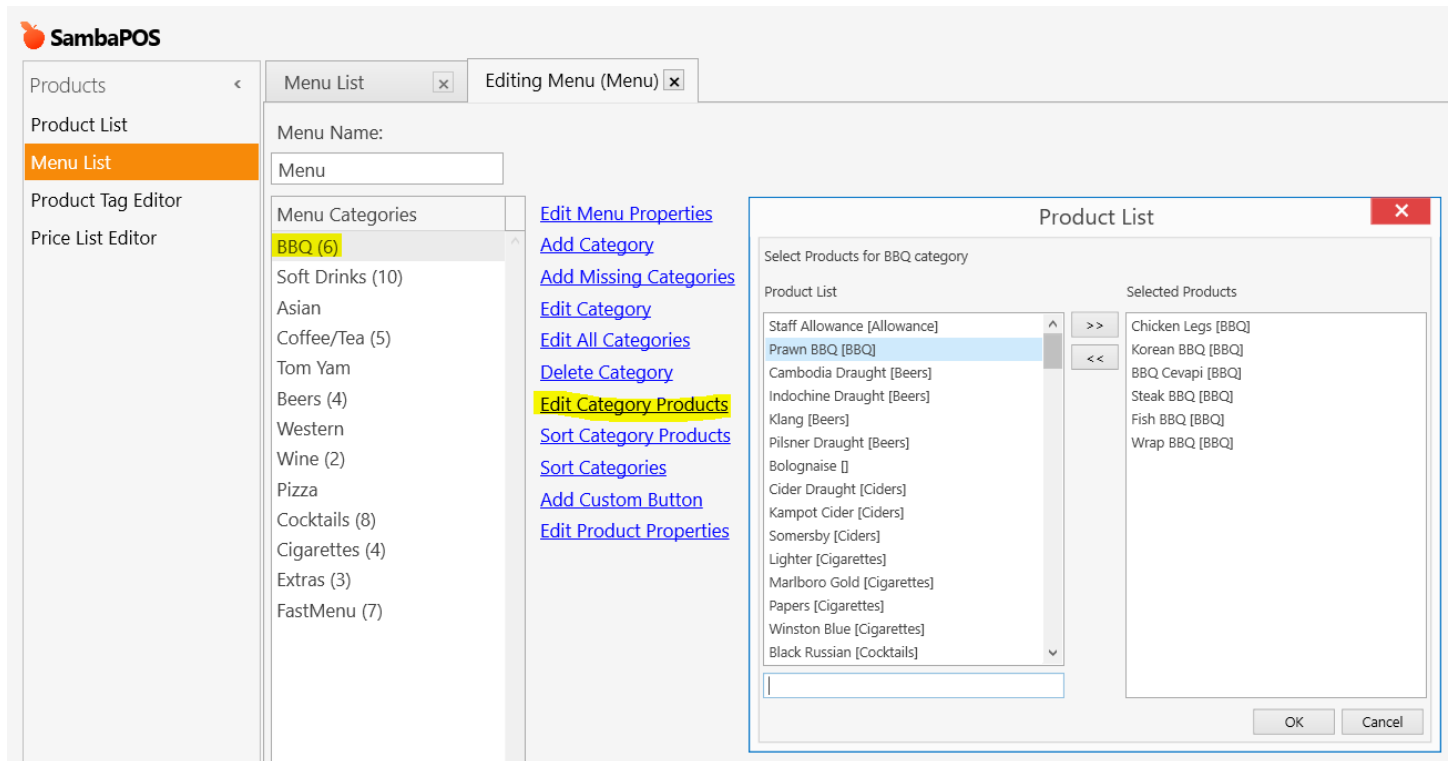
#Alcohol  
Ouzo No 7 5

Example above will create a new product called Ouzo No 7 with the price of 5\$ that belongs to Alcohol group.



In the Menu section you manipulate Menu Categories and Products you see on your POS screen.

You can edit your menu by going **Manage > Products > Menu List** selecting your menu and **Edit Menu**



By selecting a category on your menu and selecting **Edit Category Products** you can add products to your POS screen by moving them from left to right. You can also remove those products by moving them from right to left.

You can also change formatting of the categories and products such as size, colors, pictures and so on.

You can do that by clicking on **Edit Product Properties**

SambaPOS

Product	Name	Header	Appearance	Sort Order	Auto Select	Color	Image Pa...	Font Size	Quant...	Sub Menu Tags	Group Tags	Porti...	Order Tag	Order State	Automation
Trojan Souvlaki	Trojan Souvlaki		Image And Text	0	<input checked="" type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Souvlaki Sticks Big	Souvlaki Sticks Big		Image And Text	0	<input checked="" type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Moussaka	Moussaka		Image And Text	0	<input type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Pastichio	Pastichio		Image And Text	0	<input type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Gyros Salad Chips	Gyros Salad Chips		Image And Text	0	<input checked="" type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Keftekes	Keftekes		Image And Text	0	<input type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Chicken Fillet	Chicken Fillet		Image And Text	0	<input type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Single Souvlaki & Chips	Single Souvlaki & Chips		Image And Text	0	<input checked="" type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Twin Souvlaki & Chips	Twin Souvlaki & Chips		Image And Text	0	<input checked="" type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Single Souvlaki & Rice	Single Souvlaki & Rice		Image And Text	0	<input checked="" type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Hummus & Meat & Pitta	Hummus & Meat & Pitta		Image And Text	0	<input checked="" type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Hummus Greek Style	Hummus Greek Style		Image And Text	0	<input type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Papoutsakia	Papoutsakia		Image And Text	0	<input type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Classic Gemista	Classic Gemista		Image And Text	0	<input type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						
Gyros Plate	Gyros Plate		Image And Text	0	<input checked="" type="checkbox"/>	<input type="checkbox"/> #00FFFFFF		1	1						

Here you can add pictures to your products, change color and use **Auto Select** . When a product has Auto Select it means when product is selected in the POS screen it will automatically open your listing of portions, order tags and other modifiers. Otherwise you will have to select that product manually to change modifiers.

We will talk more about Order Tags below.

## 2.2 Order Tags

Order tags are modifiers for your orders which provide additional information for the staff in the kitchen, bar or your customer if those modifiers come with extra price.

The screenshot displays the SambaPOS interface for a new order. The top left shows the SambaPOS logo and the date/time: 28 March, 2019 16:40. The main order area lists items with their prices and quantities:

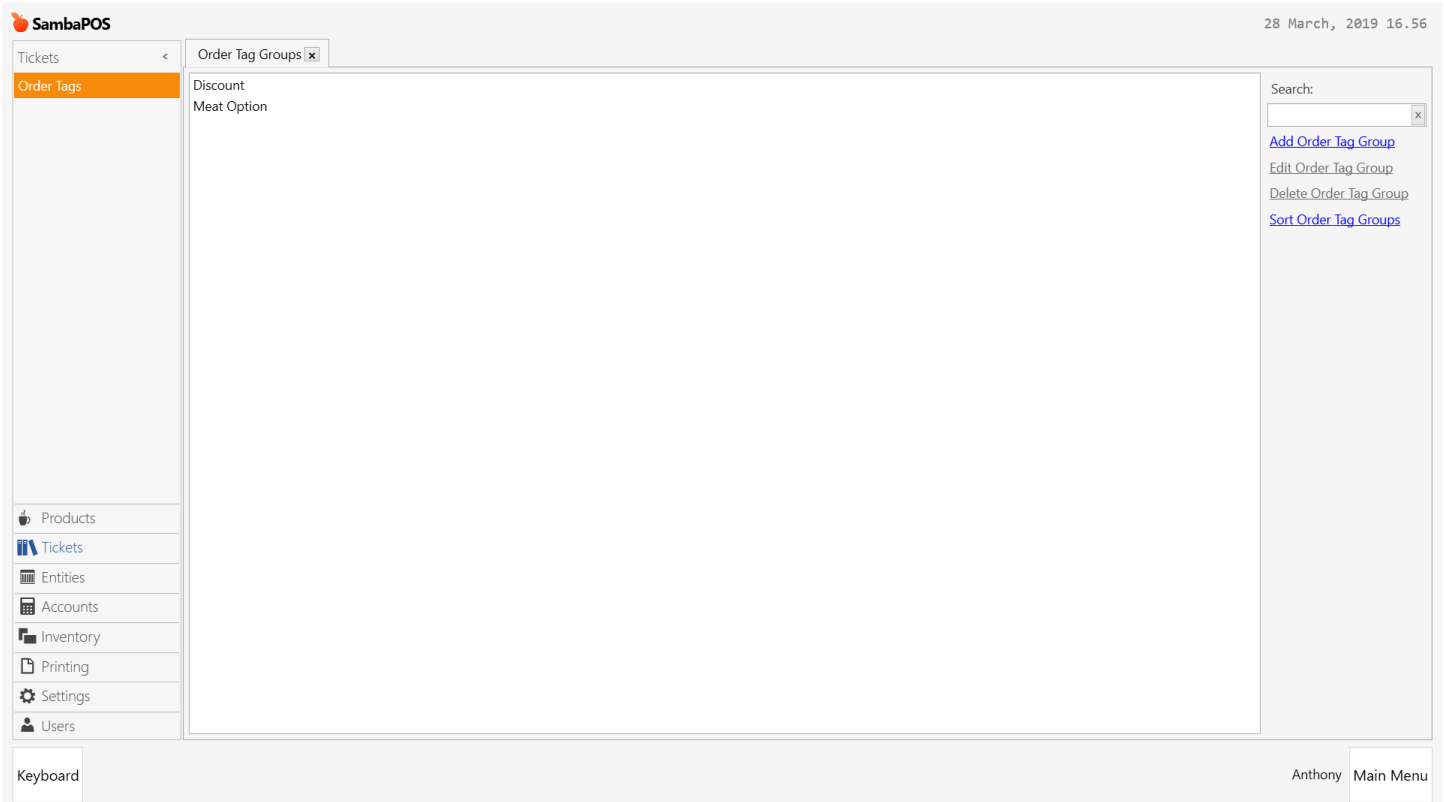
Item	Quantity	Price
Steak BBQ,T-Bone	1	16.00
Ginger Ale	1	1.00
Coke	1	1.00
Coke Zero	1	1.00
Kulen Water	1	2.00
Korean BBQ	1	5.00
Steak BBQ,Rib Eye	1	12.00

The 'Steak BBQ,Rib Eye' item is highlighted in blue. To the right, there are sections for 'Portions' (Rib Eye 12.00, T-Bone 16.00, Salmon 22.00), 'Modifier' (Rice, Fries, Mashed Potato), and 'Level' (Rare, Medium Rare, Medium, Medium Well, Well). The 'Medium Well' level is highlighted in red. Below these is a 'Free Tag' section with fields for Name and Price, and a '+' button. At the bottom, there is a 'Balance: 35.00' and buttons for 'Close', 'Settle', 'Remove', and 'Done'. A 'Keyboard' button is visible in the bottom left corner.

In this example after choosing a product, additional screen pops up where you can select your modifiers.

SambaPOS also allows **Free Tag** which gives you the flexibility to write a custom modifier that's not usually requested or doesn't exist on your menu. You can also add a custom surcharge to that modifier.

## New Order Tags can be created in **Manage > Tickets > Order Tags**



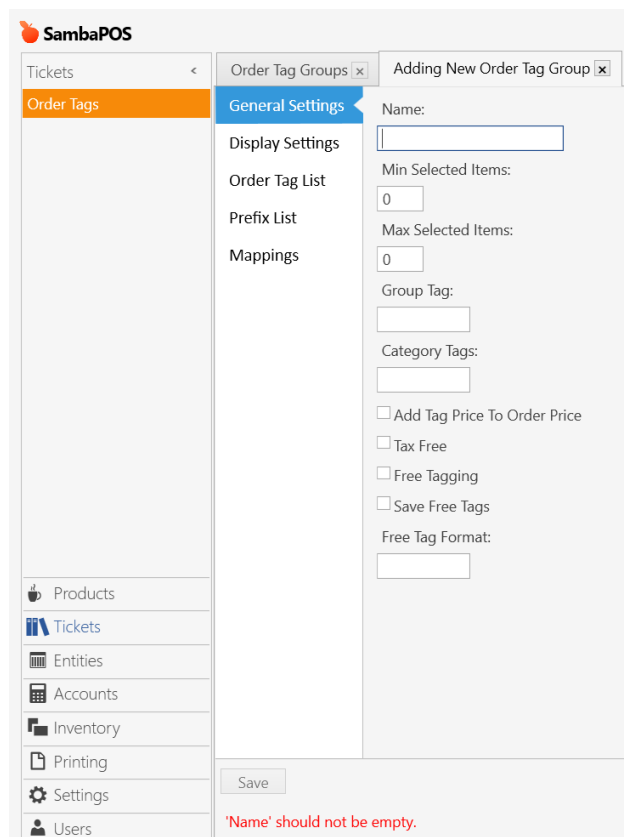
On the right side you can [Add Order Tag Group](#), [Edit Order Tag Group](#), [Delete Order Tag Group](#) and [Sort Order Tag Group](#).

Selecting [Add Order Tag Group](#) you can create the name of that Order Tag.

Depending on your product you can choose what is the minimum amount or maximum number of Order tags you can select while adding the order to the ticket.

Here you can select different properties such as whether the modifier adds price to the product or is shown separately and whether it is or isn't Tax Free.

Display Settings, Order Tag List, Prefix List and Mappings are explained below.



Display Settings allows you to change formatting of the Order Tag such as:

Default Order Tag button colors

Number of columns per Order Tag Group

Size of the buttons in pixels.

Font size

Custom formatting of the order tag.

The screenshot shows the 'Adding New Order Tag Group' dialog box with the 'Display Settings' tab selected. The left sidebar contains the following options: General Settings, Display Settings (highlighted), Order Tag List, Prefix List, and Mappings. The main area contains the following settings:

- Button Color:
- Column Count:
- Button Height:
- Font Size:
- Display Format:
- Hidden

A 'Save' button is located at the bottom of the dialog.

The screenshot shows the 'Order Tag List' table in the 'Adding New Order Tag Group' dialog. The table has the following columns: Tag, Max Quantity, Product, Price, Rate, Color, Header, Description, and Filter. The table contains the following data:

Tag	Max Quantity	Product	Price	Rate	Color	Header	Description	Filter
Extra Salad	1			2	0	<input type="checkbox"/>		
Extra Sauce	1			0.25	0	<input type="checkbox"/>		
Extra Bread	1			2	0	<input type="checkbox"/>		
[New Property]	1			0	0	<input type="checkbox"/>		

On the right side of the table, there are three buttons: [Add Order Tag](#), [Delete Order Tag](#), and [Sort Order Tags](#).

Order Tag List is a list of modifiers that will appear on the order screen. You can [Add Order Tag](#), [Delete Order Tag](#) and [Sort Order Tags](#) them with buttons on the right side.

**Tag** – name of the button

**Max Quantity** – number of times you can select the same modifier

**Product** – indicates which product will be decreased from stock (explained in inventory section)

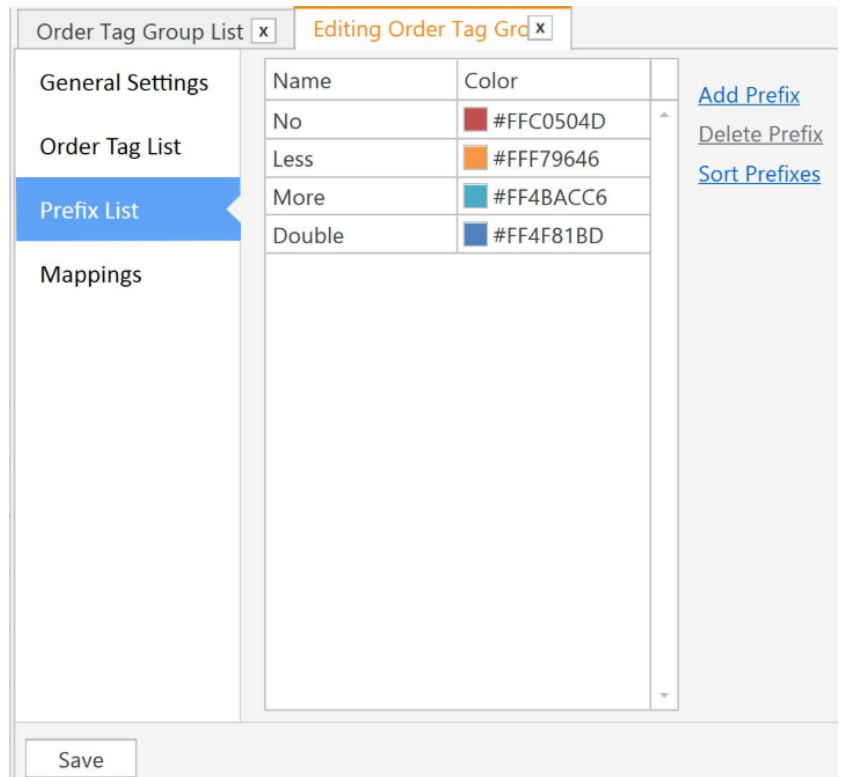
**Price** – surcharge for that order tag

**Color** – used for changing the color of the button

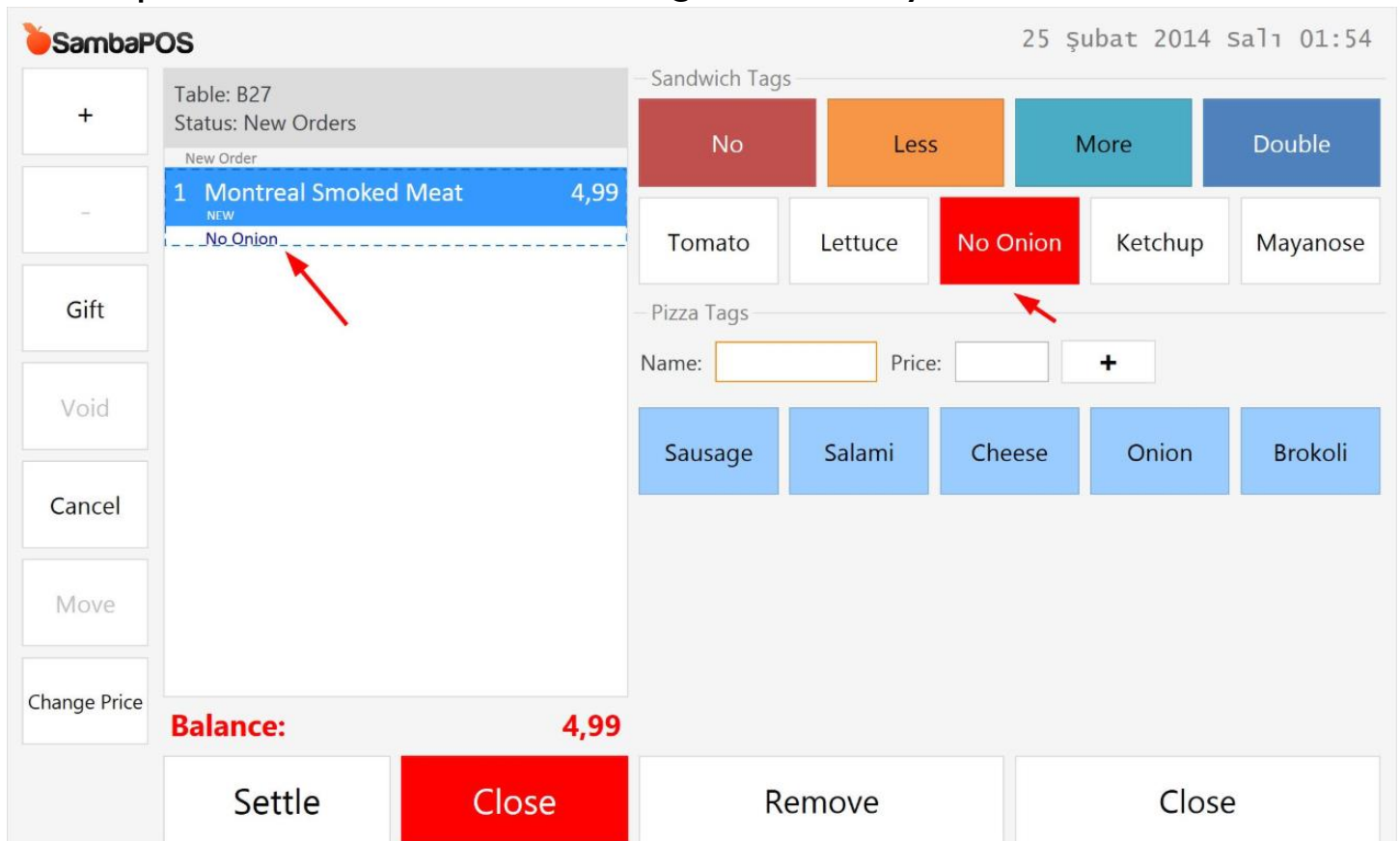
**Header** – used to change the visible name or formatting of the button

Order Tag Prefixes allow you to add additional options to your existing modifiers.

If pressed sequentially, they will add the prefix to an order Tag.



For example, if we select No prefix and select an order tag Onion - result will be No Onion. If we select Double prefix and Ketchup - result will be Double Ketchup. Prefixes allow us to have higher flexibility of our modifiers.



User Role	Department	Ticket Type	Product Group	Product	Portion
*	*	*	Food	Chicken Fillet	*

Mappings allow us to map Order Tags and Prefixes to our Product Groups, Products and Portions.

Instead of showing up on all the items we can specifically choose where we want to see our Modifiers. In this example we wanted to assign it to Product Group "Food" and specifically for the product Chicken Fillet.

This way our modifier will only be visible for Chicken Fillet.

In special scenarios Mappings allow us to choose which User Role, Department or Ticket Type can use this modifier.

\* - means All/Everyone/Everything

To explain above Mappings example:

Every User Role can use this order tag

Every Department can use this order tag

Every Ticket Type can use this order tag

Only Food product group can use this order tag

Only Chicken Fillet inside the Food product group can use this order tag

Every Portion for Chicken Fillet can use this order tag

**\* Its worth mentioning that Mappings work the same way throughout SambaPOS and are used in the same manner for different options \***

## 2.3 Inventory Items & Inventory Products

Inventory Items & Products are used for calculating stock consumption. We use these to define what our Menu Products are made of. They are defined in **Manage > Inventory > Inventory Items** or **Inventory Products**.

We need to understand the difference between Menu Products and Inventory Products.

Menu Products are things that we Sell from our Menu. They are defined in **Manage > Products > Product List**.

**Inventory Products** are products you can "build" (meatballs etc). Think of them as semi-products that are made of Inventory Items and/or Inventory Products as defined by a Recipe. They can also be used in a powerful and special way.

Let's start with basics first.



**Inventory Items** are items you Purchase from suppliers like Beer bottle, Soda can, ground Beef, or Eggs.

**SambaPOS**

Inventory Items x Editing Inventory Item (Coke Zero) x

Inventory Item Name: Coke Zero

Group Code: Soft Drinks

Warehouse Code:

Warehouse: Local Warehouse

Currency:

Units

Base Unit: Can Default Cost: 0.00

Transaction Unit: Multiplier: 0 Default Cost: 0.00

Additional Units

Unit Name	Multip...	Unit	Cost	

Add Delete

**Inventory Item Name** – is the name of the item. This name will show up while making a Purchase Transaction in Warehouse (buying stock) .....

**Group Code** – groups your items for easier sorting .....

**Warehouse Code** – works like item group code but in most cases is unnecessary and you can leave it blank .....

**Warehouse** – is your in-house stock room, by default it should be Local Warehouse; some businesses have 2 or 3 stock rooms and this variable can be used to create more complex setups in which you can move your stock around

**Base Unit** – it is a measurement unit for your inventory item in stock (Can, Bottle,L, kg, Pack etc)

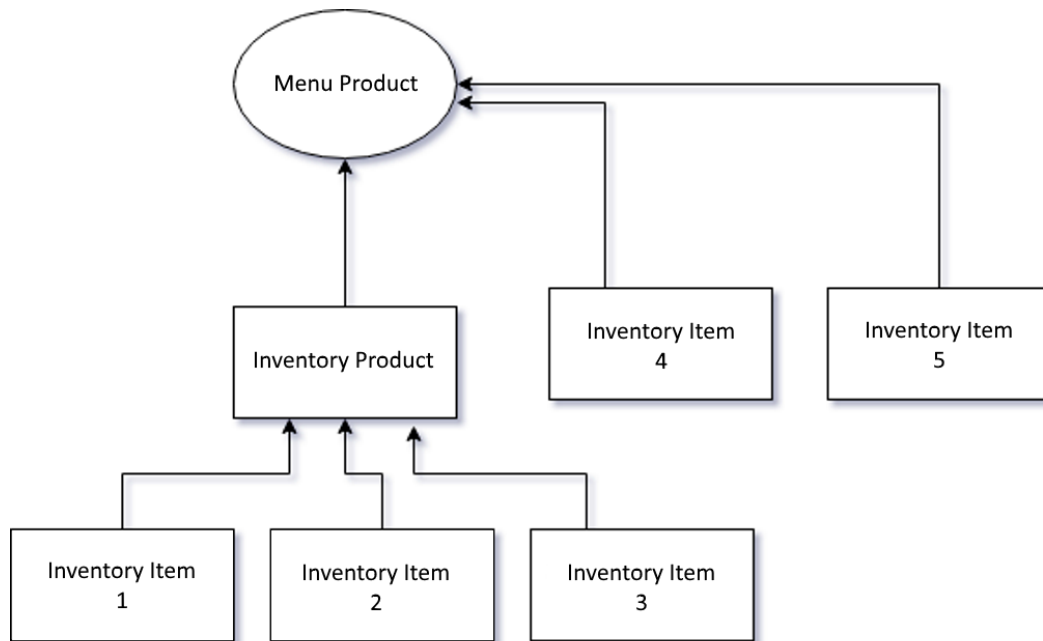
**Transaction Unit** – if you leave Transaction unit Empty stock will be counted by Base Unit, in this example Can; its best to leave it blank

Additional Units					
	Unit Name	Multiplier	Unit	Cost	
<input checked="" type="checkbox"/>	Case	24	Can	0.00	<a href="#">Add</a> <a href="#">Delete</a>
<input type="checkbox"/>	Box	4	Case	0.00	

**Additional Units** – are used for quick stock purchases, here you can declare how many Base Units are in this Additional Unit; in this example there are 24 Cans of Coke in 1 Case or there is 4 Cases in 1 box

**Check Box**  – makes the purchase unit default. When making a Purchase Transaction it will be the first one to show (when Purchasing you can change between these units)

## 2.4 Inventory Recipes



**Recipes** define which "ingredients" comprise a Menu Product (product we sell) or an Inventory Product (a semi product made of Inventory Items or other Inventory Products). This way SambaPOS allows us to create the most complex recipes where necessary.

Recipes are defined in **Manage > Inventory > Recipes**

This is a recipe for Menu Product that doesn't have portions. Menu Products that use portions will require a separate recipe for every portion you have.

Inventory Items x Recipes x Adding New Recipe x

Recipe Name: Long Island Ice Tea Recipe

Group Code: Cocktails

Product: Long Island Ice Tea

Portion: Normal

Fixed Cost: 0.00

Order Tag	Item Type	Item Name	Quantity	Unit
	Inventory Item	Gin	1.5	cL
	Inventory Item	Vodka	1.5	cL
	Inventory Item	Tequila	1.5	cL
	Inventory Item	White Rum	1.5	cL
	Inventory Item	Triple Sec	1.5	cL
	Inventory Item	Coke	0.5	Can

[Add Inventory Item](#)  
[Add Product](#)  
[Delete Line](#)

**Portion** – serving of the Menu Product; some products might have more portions such as Pizzas (Small, Medium, Large etc.)

**Product** – is our menu product we sell. When this product is selected as an order, Inventory Items stated below will be decreased from stock

**Group Code** – is the group this recipe belongs to; used for easier sorting

**Recipe Name** – name of the recipe

Items: In this window we are stating what Inventory Items will be decreased from stock when this Menu Product (Long Island Ice Tea) is selected on our order screen.

Decrease Gin for 1.5cL

Decrease Vodka for 1.5cL

Decrease Tequila for 1.5cL

Decrease White Rum for 1.5cL

Decrease Triple Sec for 1.5cL

Decrease Coke for 0.5Can (half a can)

\* **NOTE:** Recipes can only use the Base Unit of an Inventory Item. \*

## When to use Inventory Products

You sell Sliders and Subs. A slider takes 1 Meatball, while a Sub takes 3 Meatballs.

You make your own Meatballs from scratch. You don't buy packages or cases of pre-made frozen Meatballs from a Supplier. Instead, you buy Meatball Ingredients from a Supplier such as Ground Beef, Oatmeal, and Eggs.

When you make a Meatball, you don't make 1 at a time. You make them in Batches. But you don't sell Batches of Meatballs - you sell 1 Meatball, or 2, or 3, or 4, which are part of a larger Recipe for your Slider or Sub Menu Products.

How do you define the Recipe for a single Meatball? Do you take all of the ingredients in the Meatball Batch and divide each of those ingredients into minuscule measurements depending on the number of Meatballs you can make in a Batch? You could... but thankfully, we don't need to.

The screenshot shows a software interface for editing an inventory product. On the left is a navigation menu with the following items: Inventory, Transactions, Inventory Items, Products (highlighted in orange), Recipes, and End of day Records. The main content area has a title bar with 'Products' and 'Editing Product (Meatball)'. Below the title bar, there are two input fields: 'Product Name:' with the value 'Meatball' and 'Group Code:' with a dropdown menu showing 'Meat'. Below these fields is a section titled 'Units' containing a table with two columns: 'Unit' and an empty column. The table has two rows: 'Ball' and 'Batch'. To the right of the table are two buttons: 'Add Unit' (in blue) and 'Delete Unit' (in grey). At the bottom of the form is a 'Save' button.

Unit	
Ball	
Batch	

Here we define Inventory Product Meatball and its Units (similar to Base Unit)

By defining our Meatball recipe we are defining our main semi-product as a Batch portion.

Products  Recipes  Adding New Recipe

Recipe Name:

Group Code:

Product:

Portion:

Fixed Cost:

Items

Order Tag	Item Type	Item Name	Quantity	Unit	
<input type="text"/>	Inventory Item	Ground Beef	4.5	kg	<a href="#">Add Inventory Item</a>
<input type="text"/>	Inventory Item	Oatmeal	0.8	kg	<a href="#">Add Product</a>
<input type="text"/>	Inventory Item	Egg	2	Egg	<a href="#">Delete Line</a>

Recipe for Meatball Batch uses Inventory Items exclusively. In this example it takes 4.5kg of Ground beef, 0.8kg of Oatmeal and 2 Eggs to make a Meatball batch.

However, a recipe can also contain an Inventory Product.

Order Tag	Item Type	Item Name	Quantity	Unit
	Product	Meatball	0.011	Batch

We defined what it takes to make a Meatball batch. Now we need to define what fraction of that batch it takes to make our meatball we serve on a plate or in a sandwich.

Lets say in our restaurant a single meatball is approx. 60grams and we use 4500g of meat for our batch.

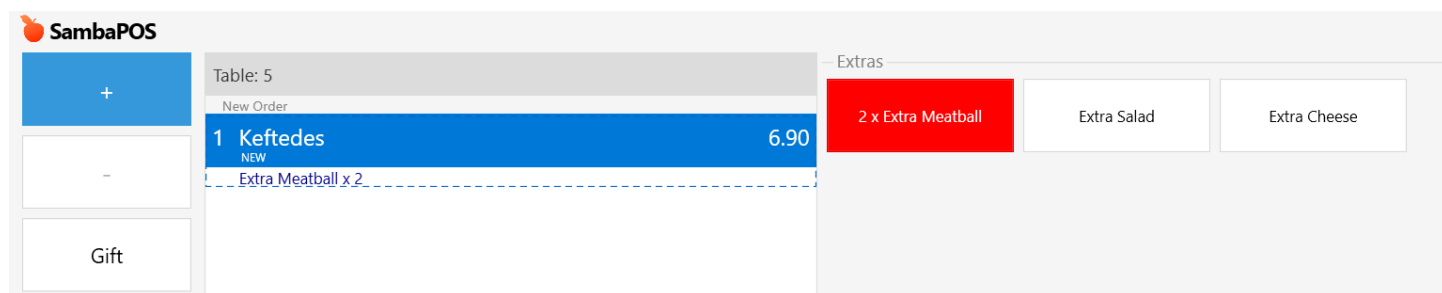
So..  $1 \text{ MeatBall} = 60\text{grams} / 4500\text{g} = 0.0133$  of a Batch

But because of other ingredients we use (that we don't track) for our meatballs we know that our batch actually gives around 90 meatballs, so:

$1 \text{ Ball} / 90 \text{ Balls} = 0.0111$  of a Batch

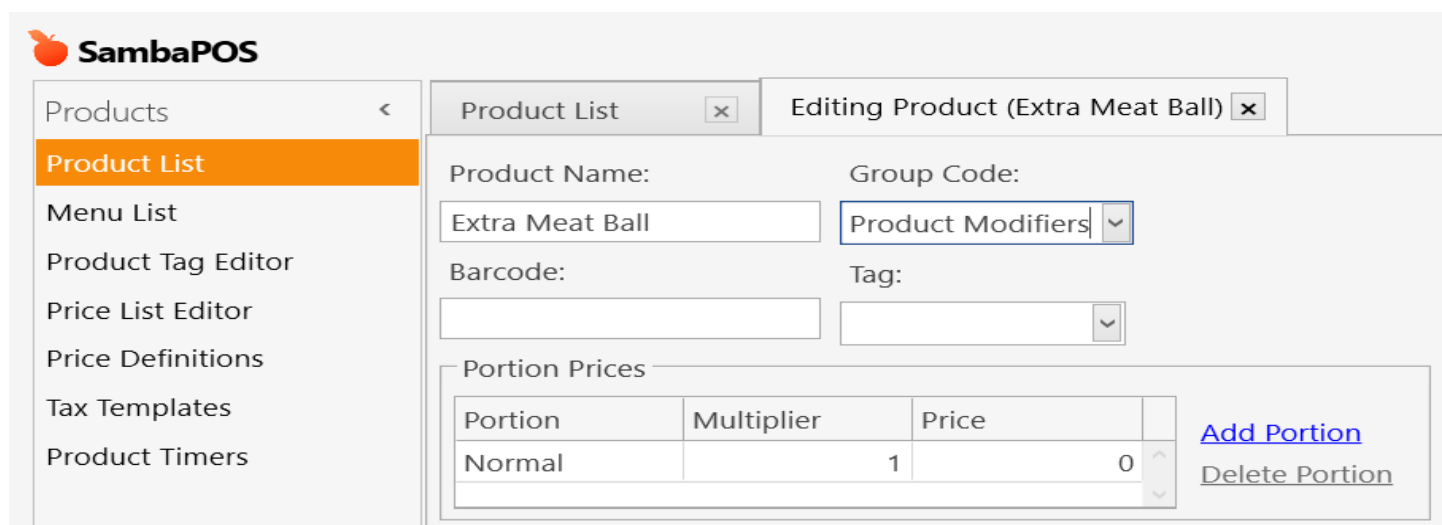
## 2.5 Inventory Consumption using Order Tags

We already mentioned Order Tags we use as our order modifiers.

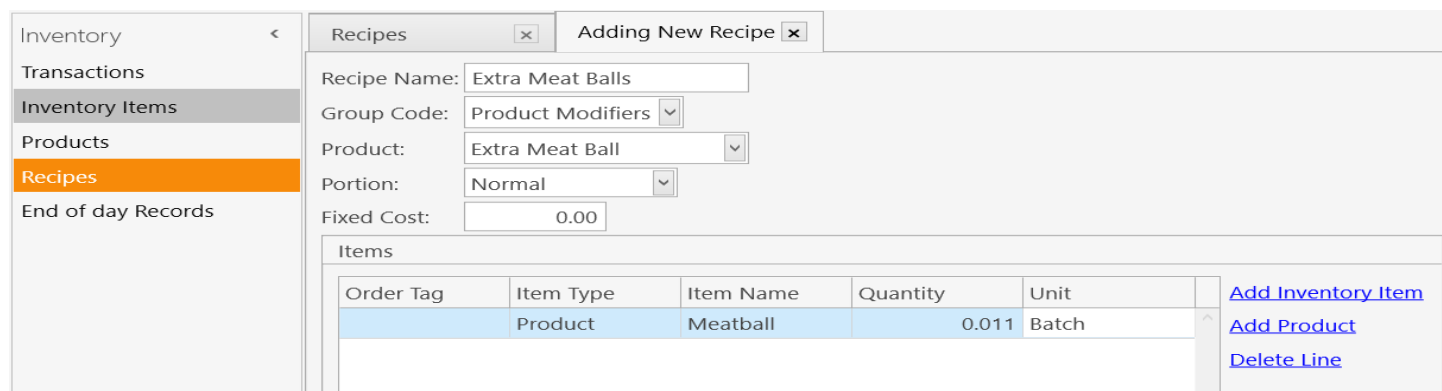


However, these orders tags can be mapped in our Inventory Consumption. This gives us an ability to have a very flexible and dynamic menu without losing track of our stock.

You can create a new Menu Product in Product List.

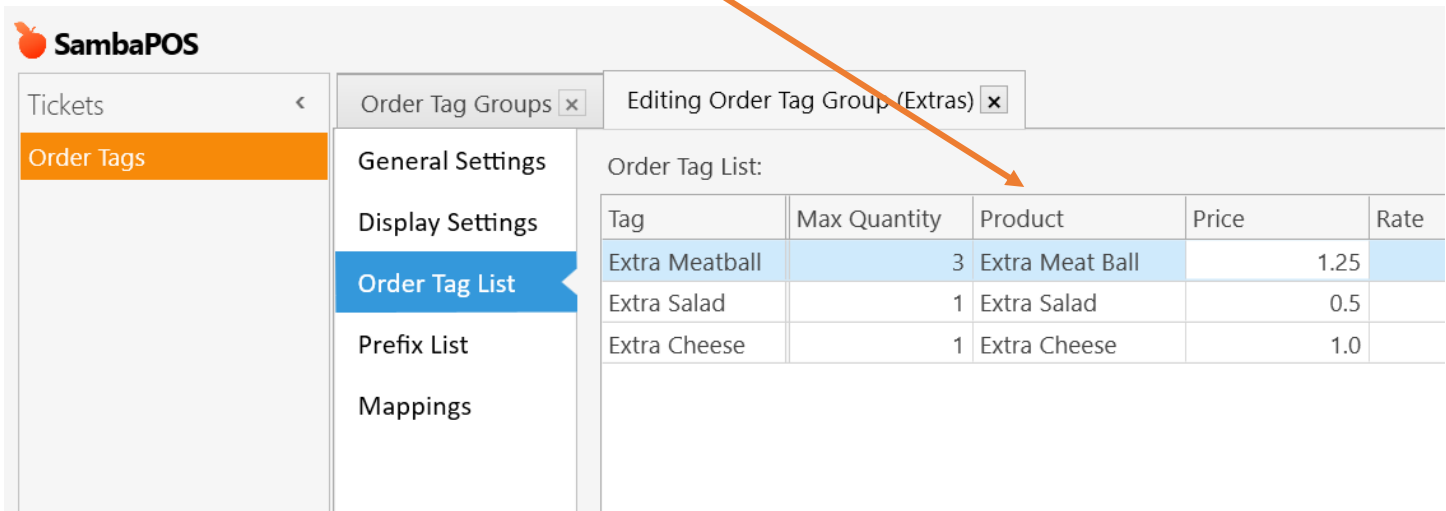


After creating a Menu Product we can create a recipe using our Meatball Batch product we mentioned earlier.





Once you have both Menu Product and Recipe you can edit your Order Tag Group and choose which Menu Product is being used by that Order Tag.



The screenshot shows the SambaPOS interface. On the left, there is a sidebar with 'Order Tags' selected. The main area is titled 'Editing Order Tag Group (Extras)'. Below this, there is a table titled 'Order Tag List' with the following data:

Tag	Max Quantity	Product	Price	Rate
Extra Meatball	3	Extra Meat Ball	1.25	
Extra Salad	1	Extra Salad	0.5	
Extra Cheese	1	Extra Cheese	1.0	

You can use this method to create flexible custom food or drink orders using nothing but Order Tags.

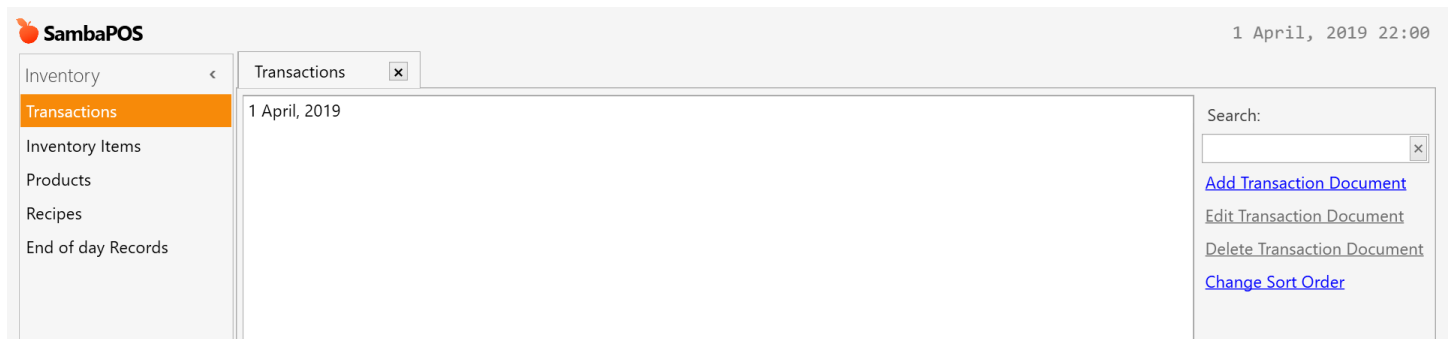
**\* This is ideal for businesses that serve "build your own burger", "build your own sandwich" and "build your own cocktail" etc. \***

## 2.6 Inventory Transactions

Inventory Transactions are purchases or movements of our stock. We already mentioned how to put stock purchases in the Warehouse screen.

SambaPOS also allows for stock movements in case you have 2 or more stock rooms.

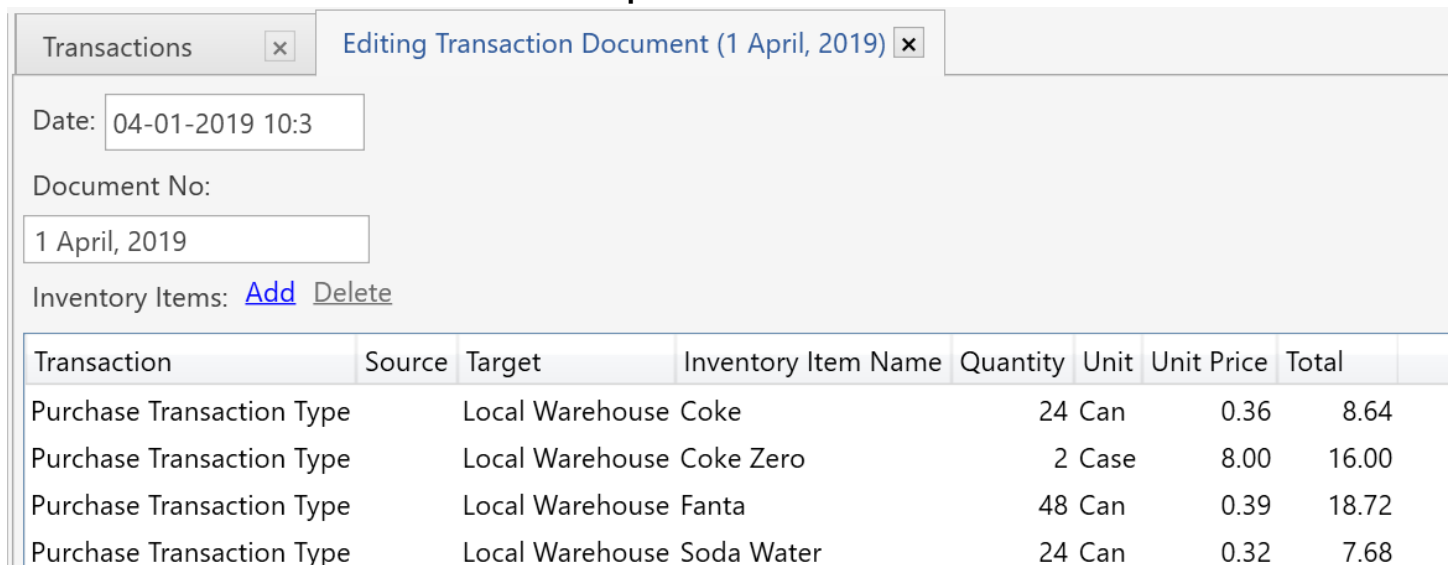
This is why they are called Inventory Transactions because similarly to accounts you can take stock from one warehouse and put it another warehouse.



Inventory Transactions can be found at **Manage > Inventory > Transactions**

This screen is used for correcting mistakes, creating transactions for management purposes or simply deleting them.

You can select a transaction and press [Edit Transaction Document](#).



Transaction	Source	Target	Inventory Item Name	Quantity	Unit	Unit Price	Total
Purchase Transaction Type		Local Warehouse	Coke	24	Can	0.36	8.64
Purchase Transaction Type		Local Warehouse	Coke Zero	2	Case	8.00	16.00
Purchase Transaction Type		Local Warehouse	Fanta	48	Can	0.39	18.72
Purchase Transaction Type		Local Warehouse	Soda Water	24	Can	0.32	7.68

You can select and modify any of the columns as you see fit.

## 2.7 End of Day Records

In order to count inventory, it is necessary to End Work Period. These documents can be accessed in **Manage > Inventory > End of Day Records**.

Each end work period process creates End of Day Record. These documents show inventory amounts between Start Work Period – End Work Period. To count inventory, open the latest End of Day document.

End of day Records x Editing End of day Record (01-04-19 22:31 - 01-04-19 22:31) x

Period: 01-04-19 22:31 - 01-04-19 22:31

Local Warehouse

Inventory Items Costs

Inventory Item Name	Unit	In Stock	Purchase	Cost	Inventory Consumption	Inventory Prediction	Current Inventory
Coke Zero	Can	96	-	0.32	8	88	
Coke	Can	72	-	0.36	15	57	
Water 500ml	Bottle	-	24	0.18	11	13	
Fanta	Can	72	-	0.37	17	55	
Soda Water	Can	24	-	0.32	14	10	
Vodka	cL	75	-	0.16	-	75	

Save Append Unmapped Items

**Inventory Item Name** – name of your stock item

**Unit** – inventory item's Base Unit

**In Stock** – quantity in stock from previous Work Period

**Purchase** – purchases of stock items during that Work Period

**Cost** – average cost of the item per unit

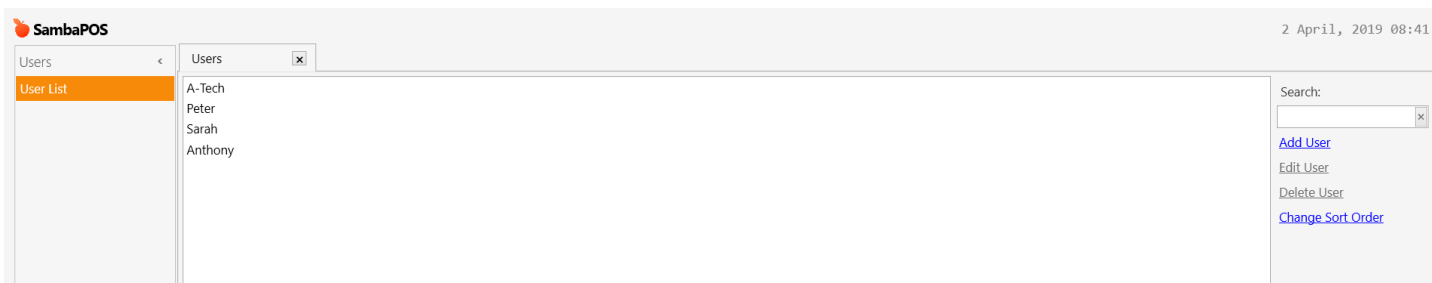
**Inventory Consumption** – items sold, consumed or gifted

**Inventory Prediction** – based on calculations this should be remaining stock

**Current Inventory** – this is the field in which inventory corrections are made when doing stock counts; this field can only be used after Ending Work Period and before Starting Working Period

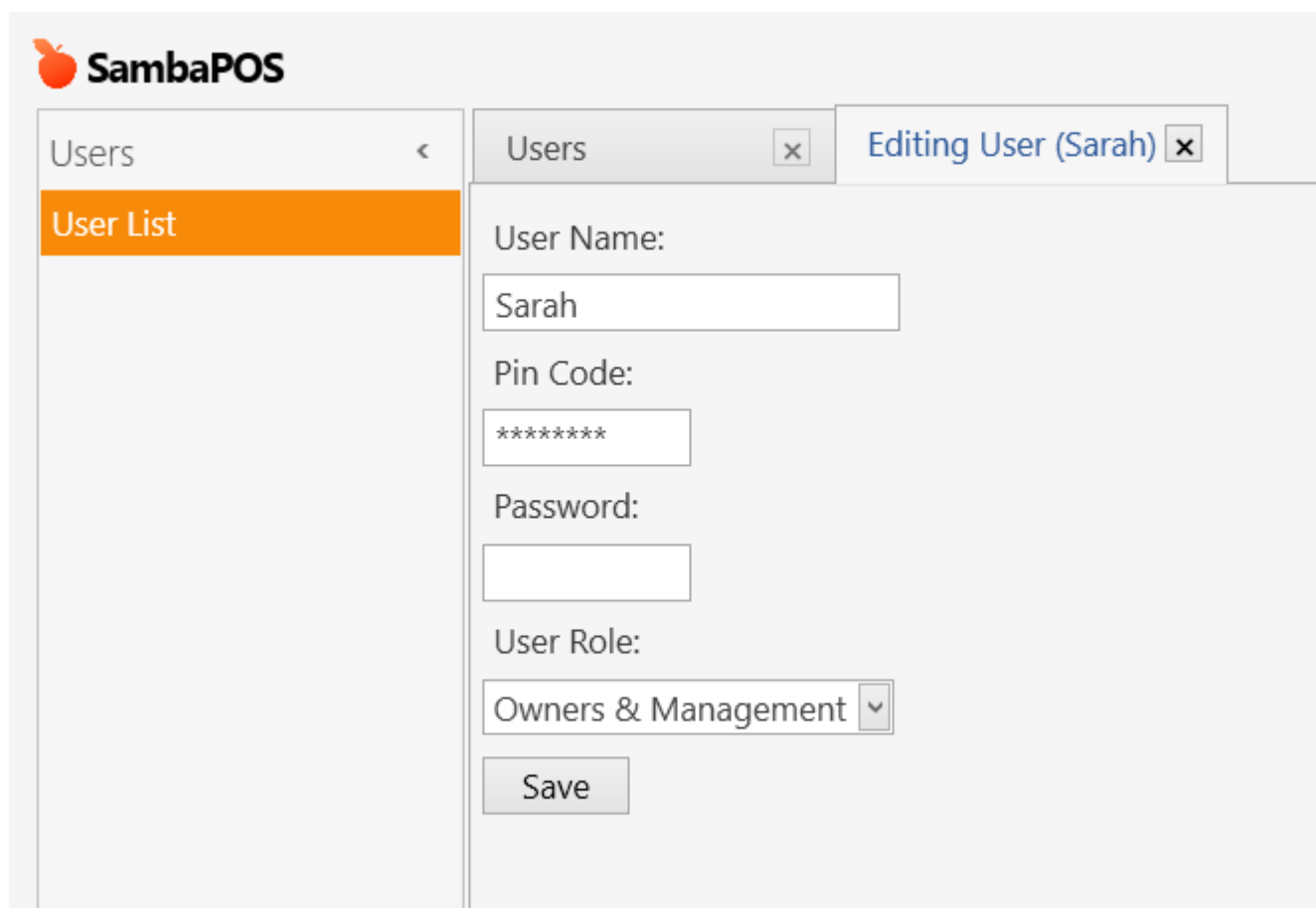
## 2.10 Users

Users section can be found at **Manage > Users > User List**. This section is used to create new staff users or change names and pins to the existing ones.



Pin codes have to be between 4-20 digits long.

User role is to assign privilege access to your staff and their purpose within the business. Different roles will allow staff to see or use different parts of the POS.



For general purpose you can leave Password empty.

## 2.11 Settings & metrik

This section can be found in **Manage > Settings**. Settings section is mostly used for accessing metrik app or Database Backups.

metrik provides instant tracking for restaurant owners using SambaPOS.



You can find more information at

[More about metrik](#)

[How to use metrik](#)

SambaPOS 2 April, 2019 09:03

Name	Description	Database Type	Date	Backup Type
GenData		SQL	25 March, 2019 15:28	Backup with Rule
GenData		SQL	25 March, 2019 12:00	Backup with Rule
GenData		SQL	25 March, 2019 11:35	Backup with Rule
GenData		SQL	25 March, 2019 09:49	Task Backup
GenData		SQL	25 March, 2019 09:42	Auto Backup
GenData		SQL	25 March, 2019 09:36	Backup with Rule
GenData		SQL	22 March, 2019 12:22	Backup with Rule
GenData		SQL	22 March, 2019 10:32	Backup with Rule
GenData		SQL	21 March, 2019 18:14	Backup with Rule
GenData		SQL	20 March, 2019 15:47	Backup with Rule
GenData		SQL	19 March, 2019 11:12	Backup with Rule
GenData		SQL	18 March, 2019 22:13	Backup with Rule
GenData		SQL	18 March, 2019 21:52	Backup with Rule
GenData		SQL	17 March, 2019 14:00	Backup with Rule
GenData		SQL	17 March, 2019 13:10	Task Backup
GenData		SQL	17 March, 2019 13:08	Backup with Rule
GenData		SQL	11 March, 2019 14:29	Backup with Rule
GenData		SQL	8 March, 2019 18:50	Backup with Rule
GenData		SQL	8 March, 2019 17:52	Backup with Rule
GenData		SQL	7 March, 2019 14:06	Backup with Rule
GenData		SQL	7 March, 2019 11:20	Backup with Rule
GenData		SQL	7 March, 2019 10:20	Backup with Rule
GenData		SQL	4 March, 2019 19:44	Task Backup
GenData		SQL	4 March, 2019 19:00	Backup with Rule
GenData		SQL	4 March, 2019 18:51	Backup with Rule
GenData		SQL	4 March, 2019 17:06	Auto Backup
GenData		SQL	4 March, 2019 17:04	Backup with Rule
GenData		SQL	4 March, 2019 16:45	Backup with Rule

Buttons: Backup Database, Restore Database, Restore from Zip, Display Backup Location

Database backups are by default created at the End of Work Period.

This is part of the backup module where you can manually **Backup Database**, **Restore Database** and **Display Backup Location**.

Database Backups [x]

Backups

Settings

Backup Location:  
 [x] [⋮] [🔍]

*Leave empty for default backup location.*

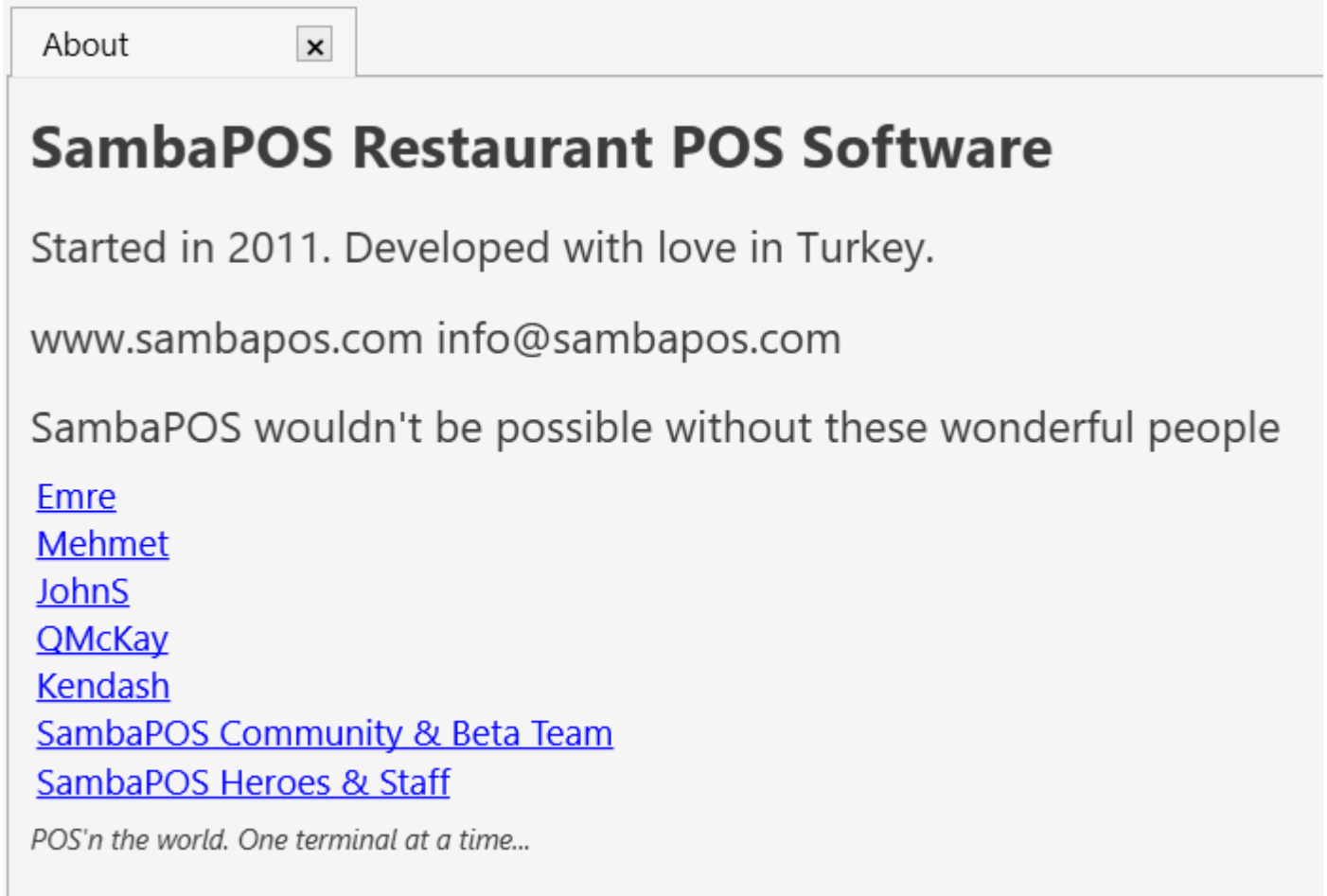
- Auto create backups after work period ends.  
*You can also use "Backup Database" Action for creating custom backup rules.*
- Auto create backups before upgrading to a new version.
- Migrate after restoration.
- Manage addon licenses on backup and restore.
- Allow overwriting database files if database names does not match during restore.
- Enable alternative Restoration Method

Save

In the Settings Tab you can also change certain behavior of backup module.

**\* Its best to leave Database Backups to your SambaPOS reseller. Making changes here could result in loss of data or inconsistent backups – rendering data recovery impossible in case of malfunction \***

## About SambaPOS:



**131209**  
Restaurants

**23**  
Languages

**195**  
Countries