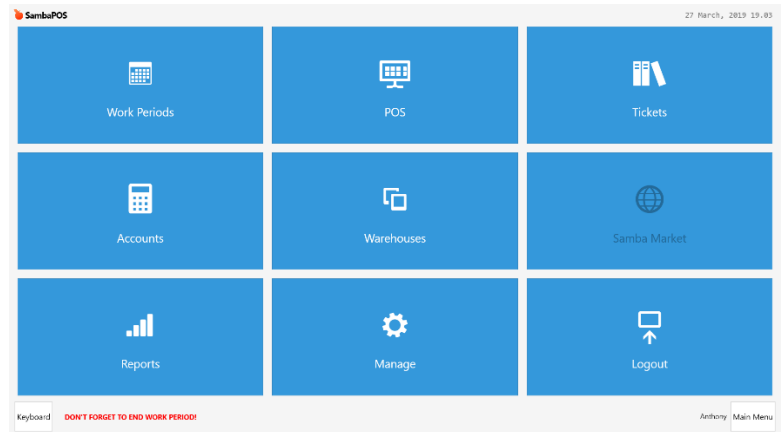


SambaPOS Staff Training Manual

1. Navigation Screen Basics

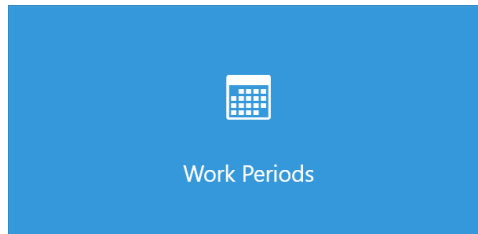
- 1.1. Work Period
- 1.2. POS
- 1.3. Tickets
- 1.4. Accounts
- 1.5. Warehouses
- 1.6. Reports



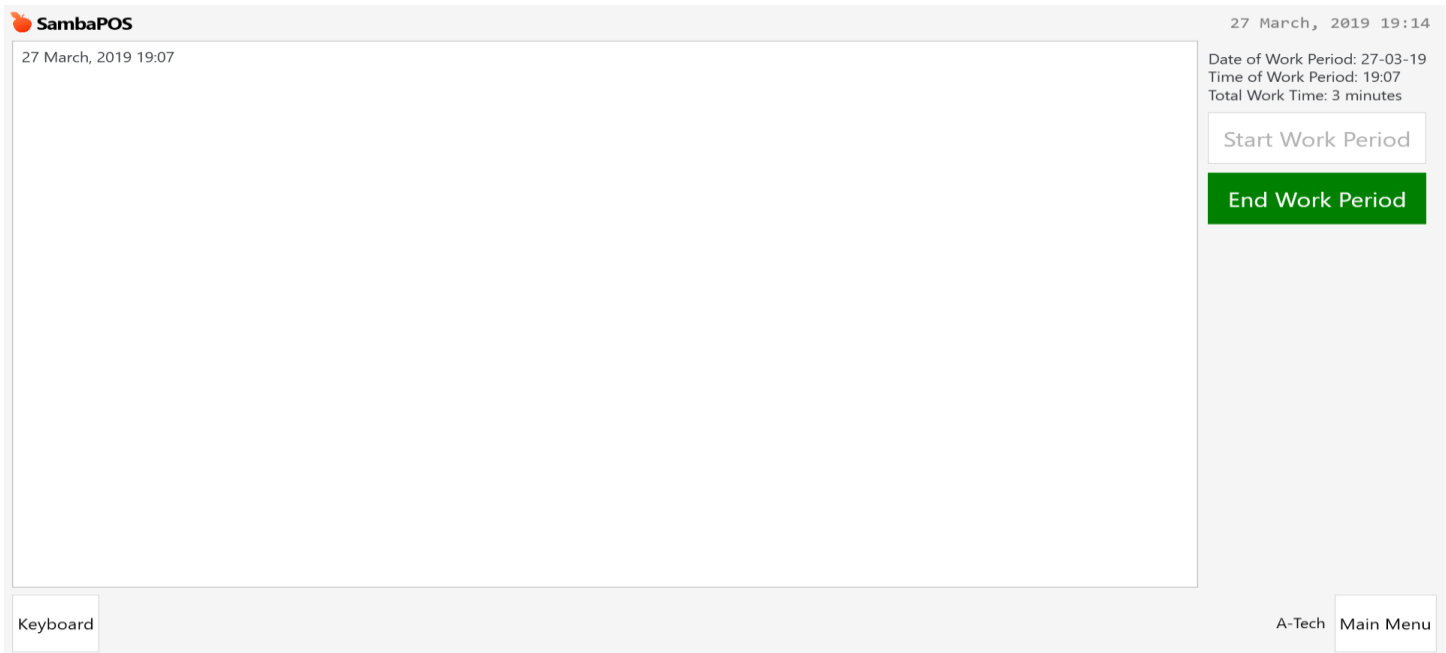
2. Manage

- 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.

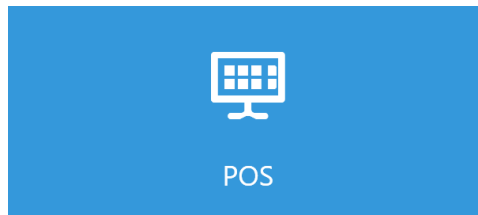
On the right side of the screen we have **Start Work Period** and **End Work Period** buttons which are useful for starting or ending your day/shift. You can also see when it was started and how long was your business open.

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

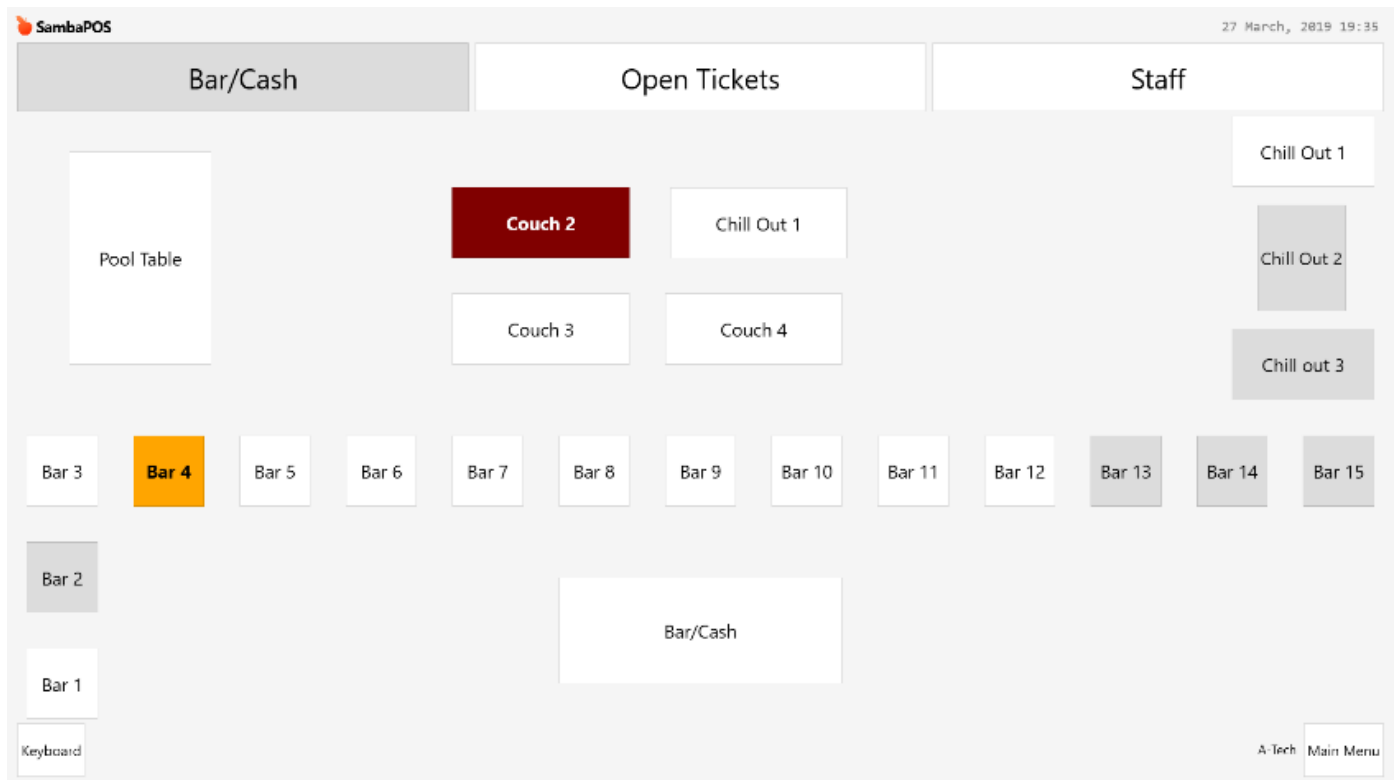
Work Periods separate your daily reports, create End of Day Records and create database backups. Its important to **End Work Period** at the end of every day/shift.

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.

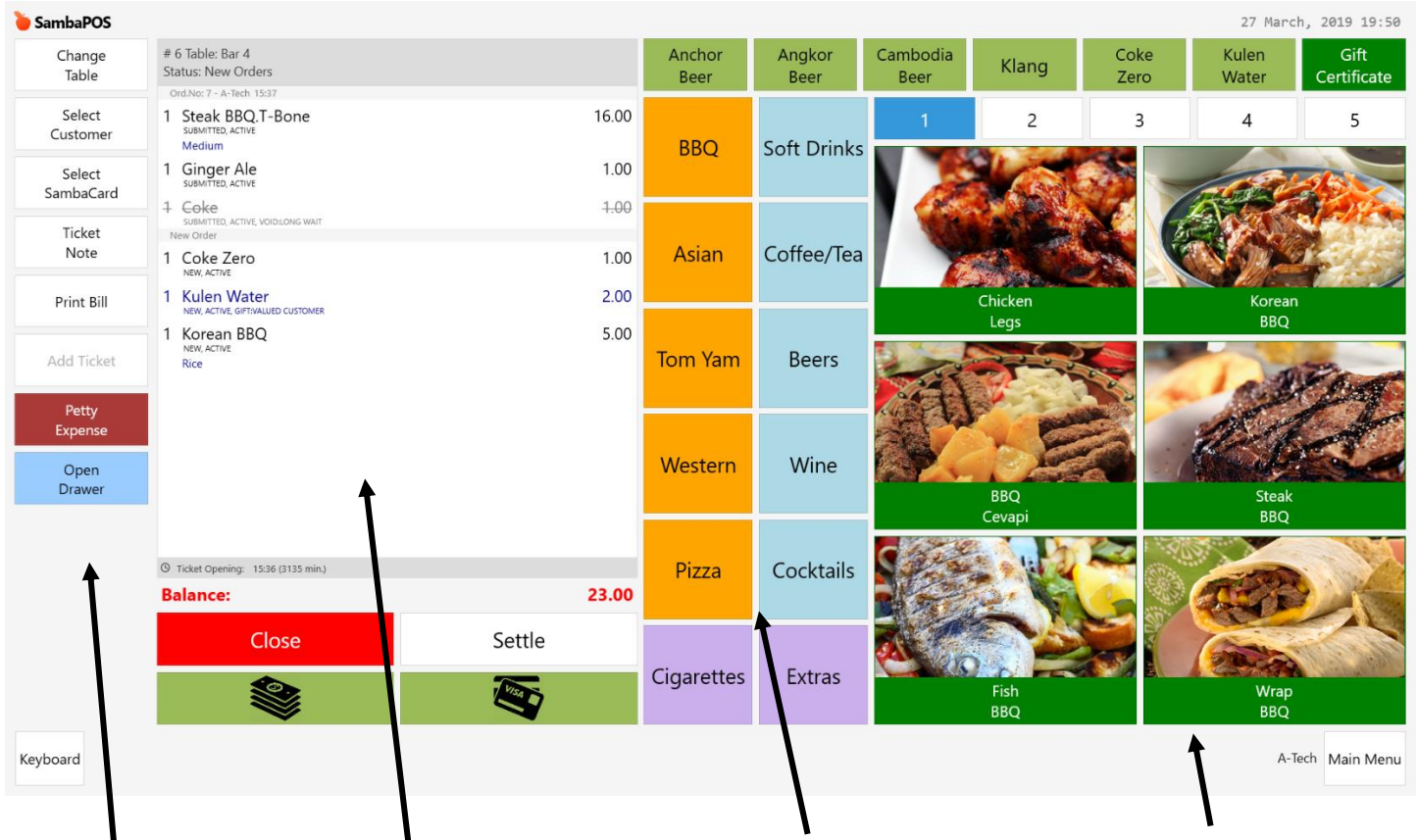


The POS screen will open your entity screens (table layouts, customers, staff etc). After selecting your Entity, you will access your **Menu Categories**, **Products** within those categories and **Ticket screen**

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.



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.

6 Table: Bar 4
Status: New Orders
Ord.No: 7 - A-Tech 15:37

1	Steak BBQ.T-Bone	16.00
	<small>SUBMITTED, ACTIVE</small>	
	Medium	
1	Ginger Ale	1.00
	<small>SUBMITTED, ACTIVE</small>	
1	Coke	1.00
	<small>SUBMITTED, ACTIVE, VOID:LONG WAIT</small>	
New Order		
1	Coke Zero	1.00
	<small>NEW, ACTIVE</small>	
1	Kulen Water	2.00
	<small>NEW, ACTIVE, GIFT:VALUED CUSTOMER</small>	
1	Korean BBQ	5.00
	<small>NEW, ACTIVE</small>	
	Rice	


Ticket Opening: 15:36 (3135 min.)


Balance:

23.00

Close

Settle





SambaPOS

9 Table: Couch 2
Status: New Orders

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

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

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

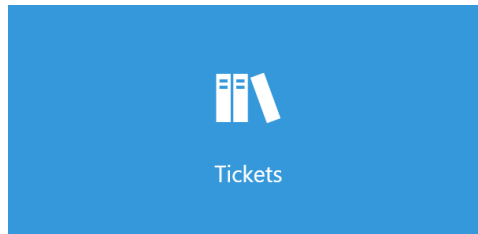
Void — is used to cancel already submitted orders and return the items to stock

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		1.00				Couch 2		

1 Ginger Ale 1.00

Display

1 1.00

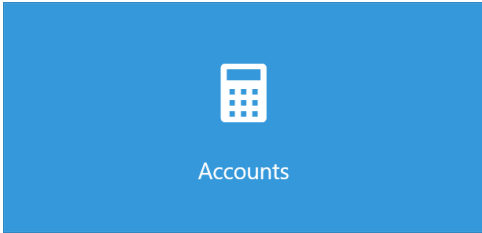
Keyboard A-Tech Main Menu

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	
⊙ Sales Accounts	-	642.00	(642.00)	-
Sales	-	642.00	(642.00)	
SambaCard Refund	-	-	-	
SambaCard Sales	-	-	-	
⊙ Receiveable Accounts	642.05	621.17	20.88	
Receiveables	642.05	621.17	20.88	
⊙ Discount Accounts	0.30	0.05	0.25	
Discount	0.30	-	0.30	
Rounding	-	0.05	(0.05)	
⊙ Payment Accounts	612.87	-	612.87	
Bank	-	-	-	
Cash	612.87	-	612.87	
GC Funds	-	-	-	
Voucher	-	-	-	
⊙ Customer Accounts	8.00	-	8.00	
Customer Accounts	8.00	-	8.00	
⊙ GC Balances	-	-	-	
GC Purchases	-	-	-	
GC Redemptions	-	-	-	
				-

Account Details

Print

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.

Default

Refresh

Print

28 March, 2019 13.57

ATech -

Close

Find Ticket

Cash

Credit Card

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

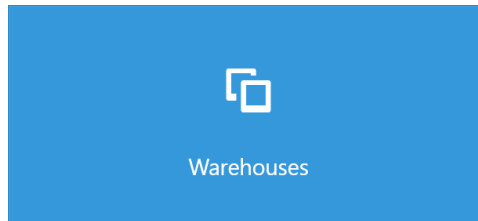
A-Tech

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
Cambodia Draught	L	-	21	1.00	-	21
Klang	Can	-	48	0.36	-	48
Pilsner Draught	L	-	-	-	-	-
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

Display Cost

Purchase Transaction

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 14:28

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

Keyboard

A-Tech Main Menu

Close

Add

Delete

Save

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.

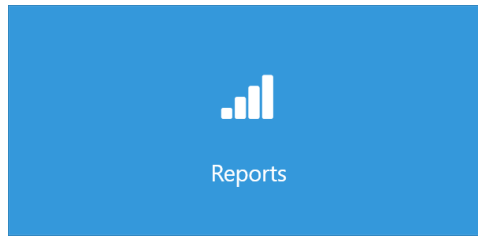
Close – Closes the screen and brings you back to your Warehouse screen.

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

Work Period Report

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

25-03-19

28-03-19

Refresh

Print

Save

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
GRAND TOTAL	641.75

Payments	
Cash	98.70% 609.75
Sean	1.30% 8.00
Total	617.75

Customer Transaction Total	
Total Cash	0.00
Total Credit Card	0.00
Grand Total	0.00

Customer Recieveables	
Sean	100.00% 8.00
Total	8.00

Ticket Details	
Ticket Counts	
Ticket	8 641.75
Delivery Ticket	- -
Total	8 641.75
Amount per Ticket	80.22
Order Counts	
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

- 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 ▾

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

25-03-19 ▾ 28-03-19 ▾

Refresh Print Save

Payments		
Cash	98.70%	609.75
Sean	1.30%	8.00
Total		617.75

Customer Transaction Total	
Total Cash	0.00
Total Credit Card	0.00
Grand Total	0.00

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.

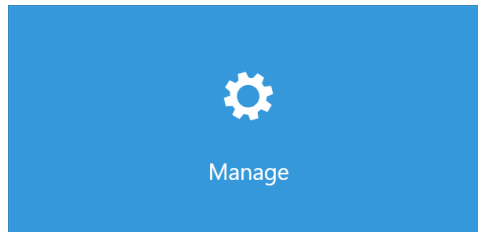
On the right side you have a custom filter in which you can put in your own Start and End date.

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 displays the SambaPOS application window. The top bar shows the 'SambaPOS' logo on the left and the date/time '28 March, 2019 15.12' on the right. A left sidebar contains a menu with options: 'Products' (selected), 'Menu List', 'Product Tag Editor', and 'Price List Editor'. Below this is a vertical toolbar with icons for 'Products', 'Tickets', 'Entities', 'Accounts', 'Inventory', 'Printing', 'Settings', and 'Users'. The main content area is titled 'Product List' and features a tree view on the left with categories: 'Alcohol', 'Coffee', 'Detox', and 'Food'. Each category has a list of items: 'Alcohol' (Heineken, Angkor, Tiger, Tiger Crystal, Cambodia, Ouzo No 7), 'Coffee' (Espresso, Double Espresso, Americano, Cafe Latte, Caramel Latte, Caffé 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, Keftedes, Chicken Fillet, Single Souvlaki & Chips). On the right side of the main area, there is a search bar and a list of action links: 'Add Product', 'Edit Product', 'Delete Product', 'Batch Create Products', and 'Change Sort Order'. At the bottom of the window, there is a status bar with 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
Editing Product (Heineken)

Product List
Menu List
Product Tag Editor
Price List Editor

Product Name:
Group Code:

Heineken
Alcohol

Barcode:
Tag:

Portion Prices

Portion	Multiplier	Price
Normal	1	2.00
Add Portion Delete Portion		

Custom Tags

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

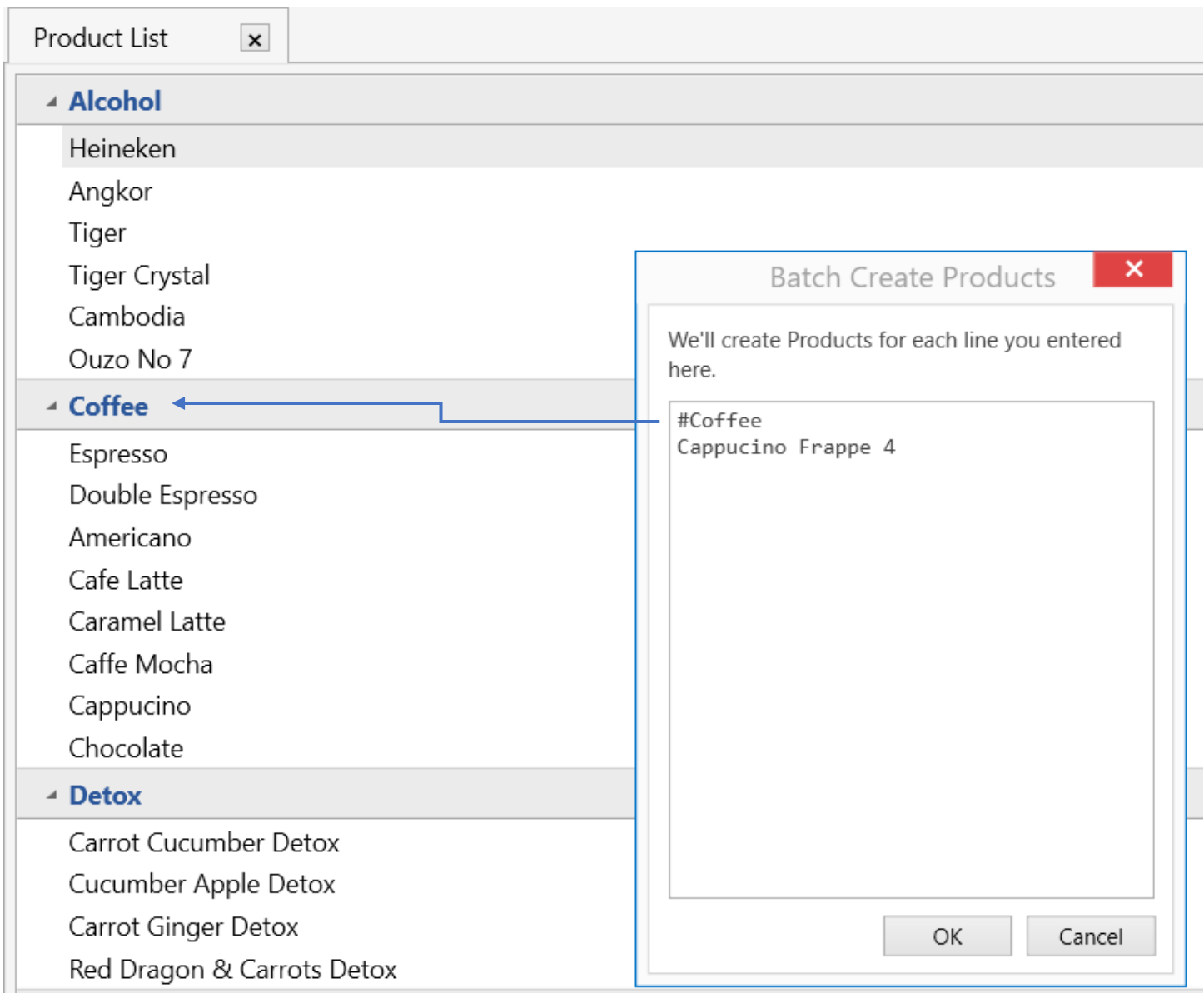
Save

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.

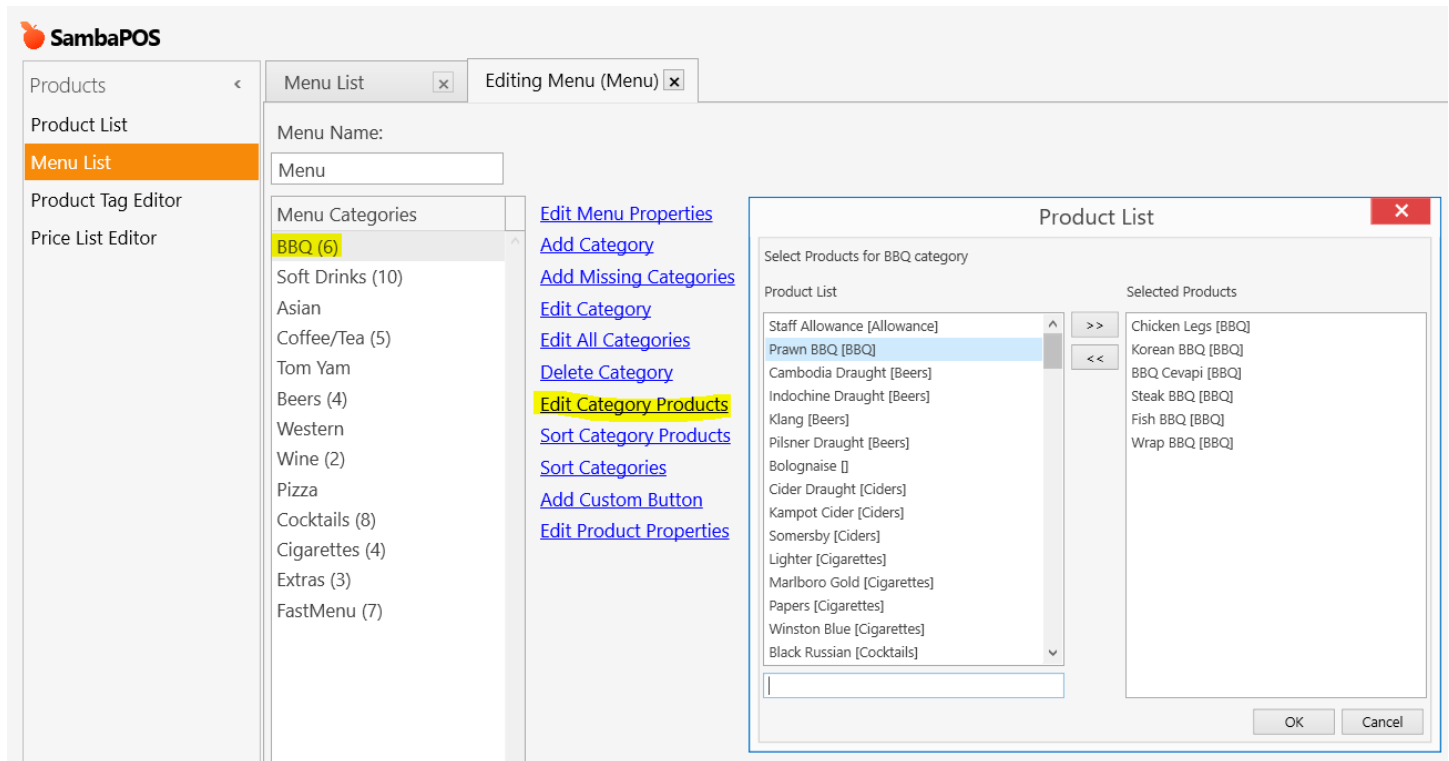
Products are written without the hashtag. Last number in the line will be saved as the price of the product.

#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															
Search															
Product	Name	Header	Appearance	Sort Order	Auto Select	Color	Image Pa...	Font Size	Quanti...	Sub Menu Tags	Group Tags	Porti...	Order Tag	Order State	Automation
Trojan Souvlaki	Trojan Souvlaki		Image And Text	0	<input checked="" type="checkbox"/>	#00FFFFFF		1	1						
Souvlaki Sticks Big	Souvlaki Sticks Big		Image And Text	0	<input checked="" type="checkbox"/>	#00FFFFFF		1	1						
Moussaka	Moussaka		Image And Text	0	<input type="checkbox"/>	#00FFFFFF		1	1						
Pastichio	Pastichio		Image And Text	0	<input type="checkbox"/>	#00FFFFFF		1	1						
Gyros Salad Chips	Gyros Salad Chips		Image And Text	0	<input checked="" type="checkbox"/>	#00FFFFFF		1	1						
Keftekes	Keftekes		Image And Text	0	<input type="checkbox"/>	#00FFFFFF		1	1						
Chicken Fillet	Chicken Fillet		Image And Text	0	<input type="checkbox"/>	#00FFFFFF		1	1						
Single Souvlaki & Chips	Single Souvlaki & Chips		Image And Text	0	<input checked="" type="checkbox"/>	#00FFFFFF		1	1						
Twin Souvlaki & Chips	Twin Souvlaki & Chips		Image And Text	0	<input checked="" type="checkbox"/>	#00FFFFFF		1	1						
Single Souvlaki & Rice	Single Souvlaki & Rice		Image And Text	0	<input checked="" type="checkbox"/>	#00FFFFFF		1	1						
Hummus & Meat & Pitta	Hummus & Meat & Pitta		Image And Text	0	<input checked="" type="checkbox"/>	#00FFFFFF		1	1						
Hummus Greek Style	Hummus Greek Style		Image And Text	0	<input type="checkbox"/>	#00FFFFFF		1	1						
Papoutsakia	Papoutsakia		Image And Text	0	<input type="checkbox"/>	#00FFFFFF		1	1						
Classic Gemista	Classic Gemista		Image And Text	0	<input type="checkbox"/>	#00FFFFFF		1	1						
Gyros Plate	Gyros Plate		Image And Text	0	<input checked="" 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. On the left is a sidebar with buttons: +, -, Gift, Void, Cancel, Move, and Change Price. The main area shows a list of items for #6 Table: Bar 4. The items are: 1 Steak BBQ.T-Bone (16.00), 1 Ginger Ale (1.00), 1 Coke (1.00), 1 Coke Zero (1.00), 1 Kulen Water (2.00), and 1 Korean BBQ (5.00). The total is 35.00. Below the items is a 'Balance' section with 'Close' and 'Settle' buttons. At the bottom are 'Remove' and 'Done' buttons. On the right, there are sections for 'Portions' (Rib Eye 12.00, T-Bone 16.00, Salmon 22.00), 'Modifier' (Rice, Fries, Mashed Potato), 'Level' (Rare, Medium Rare, Medium, Medium Well, Well), and 'Free Tag' (Name: , Price: , +).

SambaPOS 28 March, 2019 16:40

6 Table: Bar 4
Status: New Orders
OrdNo: 7 - A-Tech 15:37

1 Steak BBQ.T-Bone 16.00
SUBMITTED, ACTIVE
Medium

1 Ginger Ale 1.00
SUBMITTED, ACTIVE

1 Coke 1.00
SUBMITTED, ACTIVE, VOID/LONG WAIT
OrdNo: 10 - A-Tech 19:50

1 Coke Zero 1.00
SUBMITTED, ACTIVE

1 Kulen Water 2.00
SUBMITTED, ACTIVE, GIFT/VALUED CUSTOMER

1 Korean BBQ 5.00
SUBMITTED, ACTIVE
Rice

New Order

1 Steak BBQ.Rib Eye 12.00
NEW, ACTIVE
Mashed Potato
Medium Well

Ticket Opening: 15:36 (4384 min.)

Balance: 35.00

Close Settle

Remove Done

Portions

Rib Eye 12.00 T-Bone 16.00 Salmon 22.00

Modifier

Rice Fries Mashed Potato

Level

Rare Medium Rare Medium Medium Well Well

Free Tag

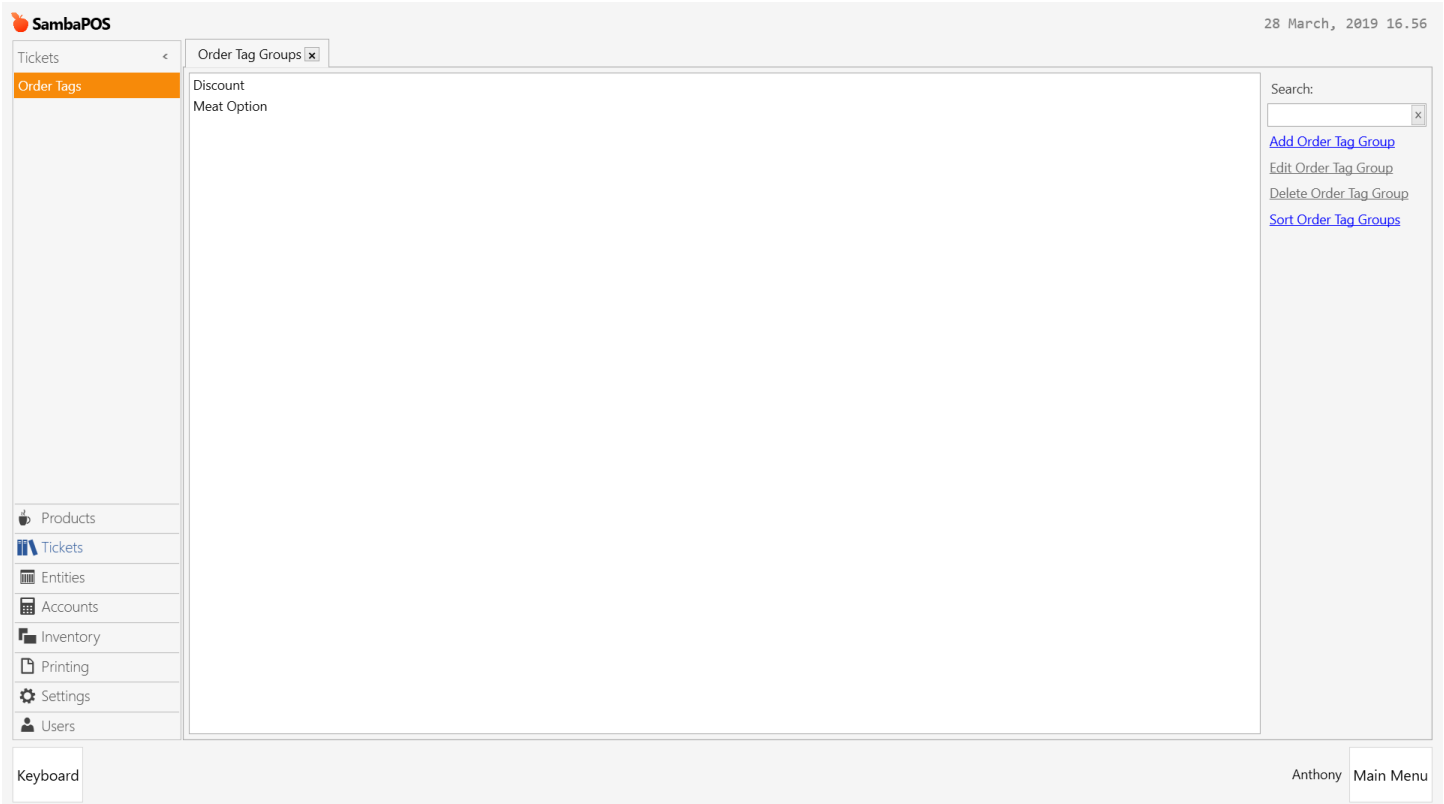
Name: Price: +

Keyboard A-Tech Main Menu

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**



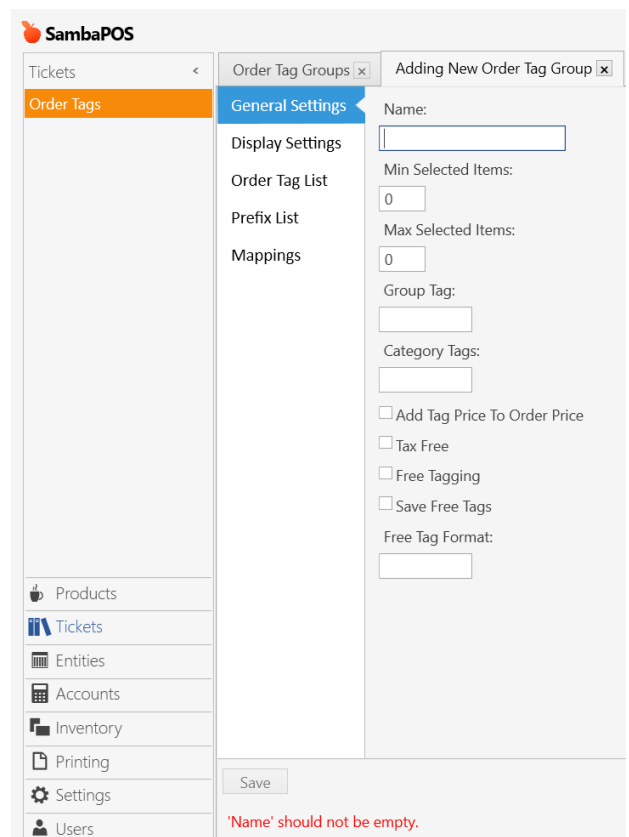
On the right side you can [Add Order Tag Group](#), [Edit Order Tag Group](#), [Delete Order Tag Group](#) and [Sort Order Tag Group](#).

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.

Order Tag Groups [x] Adding New Order Tag Group [x]

General Settings
Display Settings
Order Tag List
Prefix List
Mappings

Button Color:

Column Count:

Button Height:

Font Size:

Display Format:

☐ Hidden

Save

Order Tag Groups [x] Adding New Order Tag Group [x]

General Settings
Display Settings
Order Tag List
Prefix List
Mappings

Order Tag List:

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"/>			

[Add Order Tag](#)
[Delete Order Tag](#)
[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.

Name	Color
No	#FFC0504D
Less	#FFF79646
More	#FF4BACC6
Double	#FF4F81BD

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.

Table: B27
Status: New Orders

New Order

1	Montreal Smoked Meat	4,99
---	----------------------	------

NEW
No Onion

Sandwich Tags

No Less More Double

Tomato Lettuce No Onion Ketchup Mayanose

Pizza Tags

Name: Price: +

Sausage Salami Cheese Onion Brokoli

Balance: 4,99

Settle Close Remove Close

Order Tag Groups x	Adding New Order Tag Group x
General Settings	Order Tag Mapping: Add Delete
Display Settings	
Order Tag List	
Prefix List	
Mappings	

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 < | Inventory Items x | Editing Inventory Item (Coke Zero) x

Inventory Item Name:

Group Code:

Warehouse Code:

Warehouse:

Currency:

Units

Base Unit: Default Cost:

Transaction Unit: Multiplier: Default Cost:

Additional Units

Unit Name	Multip...	Unit	Cost
<div>Add</div> <div>Delete</div>			

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)

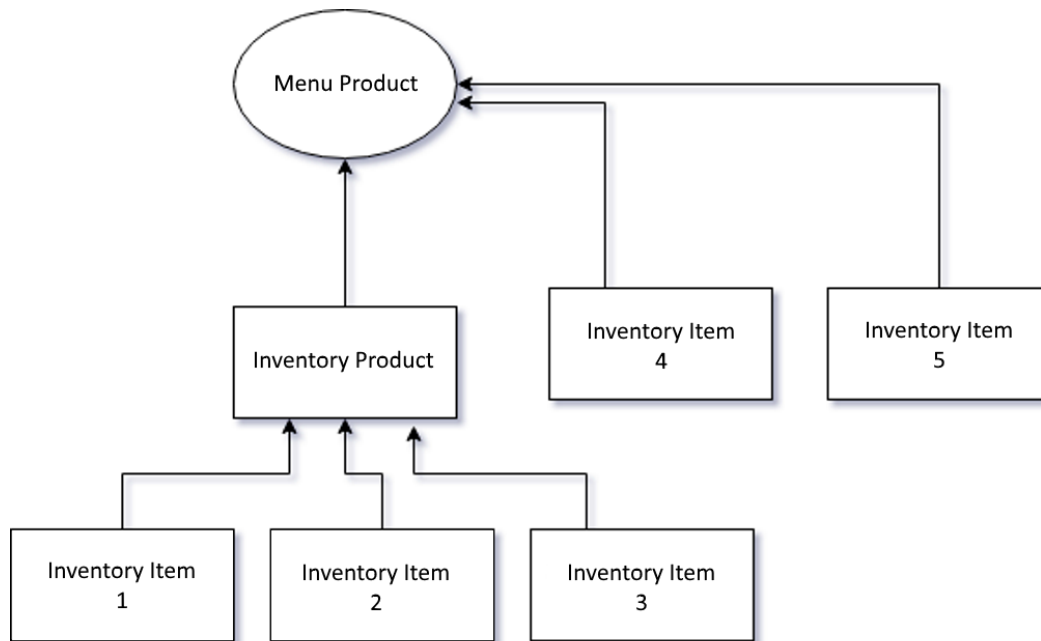
Transaction Unit — if you leave Transaction unit Empty stock will be counted by Base Unit, in this example Can; its best to leave it blank

Additional Units					
	Unit Name	Multiplier	Unit	Cost	
<input checked="" type="checkbox"/>	Case	24	Can	0.00	Add Delete
<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.

Inventory	
Transactions	
Inventory Items	
Products	
Recipes	
End of day Records	

Products

Editing Product (Meatball)

Product Name:

Group Code:

Meatball

Meat

Units

Unit	
Ball	
Batch	

[Add Unit](#)
[Delete Unit](#)

Save

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

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

Products

Recipes

Adding New Recipe

Recipe Name:

Meatball Batch Recipe

Group Code:

Ingredients

Product:

Meatball

Portion:

Batch

Fixed Cost:

0.00

Items

Order Tag	Item Type	Item Name	Quantity	Unit	
	Inventory Item	Ground Beef	4.5	kg	Add Inventory Item
	Inventory Item	Oatmeal	0.8	kg	Add Product
	Inventory Item	Egg	2	Egg	Delete Line

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.

Products [x] Recipes [x] Editing Recipe (Meatball BALL Recipe) [x]

Recipe Name: Meatball BALL Recipe

Group Code: Ingredients

Product: Meatball

Portion: Ball

Fixed Cost: 0.00

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

[Add Inventory Item](#)

[Add Product](#)

[Delete Line](#)

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.

SambaPOS

Table: 5

New Order

1 Keftedes 6.90

NEW

Extra Meatball x 2

Extras

2 x Extra Meatball

Extra Salad

Extra Cheese

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.

SambaPOS

Products <

Product List

Menu List

Product Tag Editor

Price List Editor

Price Definitions

Tax Templates

Product Timers

Product List x

Editing Product (Extra Meat Ball) x

Product Name: Extra Meat Ball

Group Code: Product Modifiers

Barcode:

Tag:

Portion Prices

Portion	Multiplier	Price
Normal	1	0

[Add Portion](#)

[Delete Portion](#)

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

Inventory <

Transactions

Inventory Items

Products

Recipes

End of day Records

Recipes x

Adding New Recipe x

Recipe Name: Extra Meat Balls

Group Code: Product Modifiers

Product: Extra Meat Ball

Portion: Normal

Fixed Cost: 0.00

Items

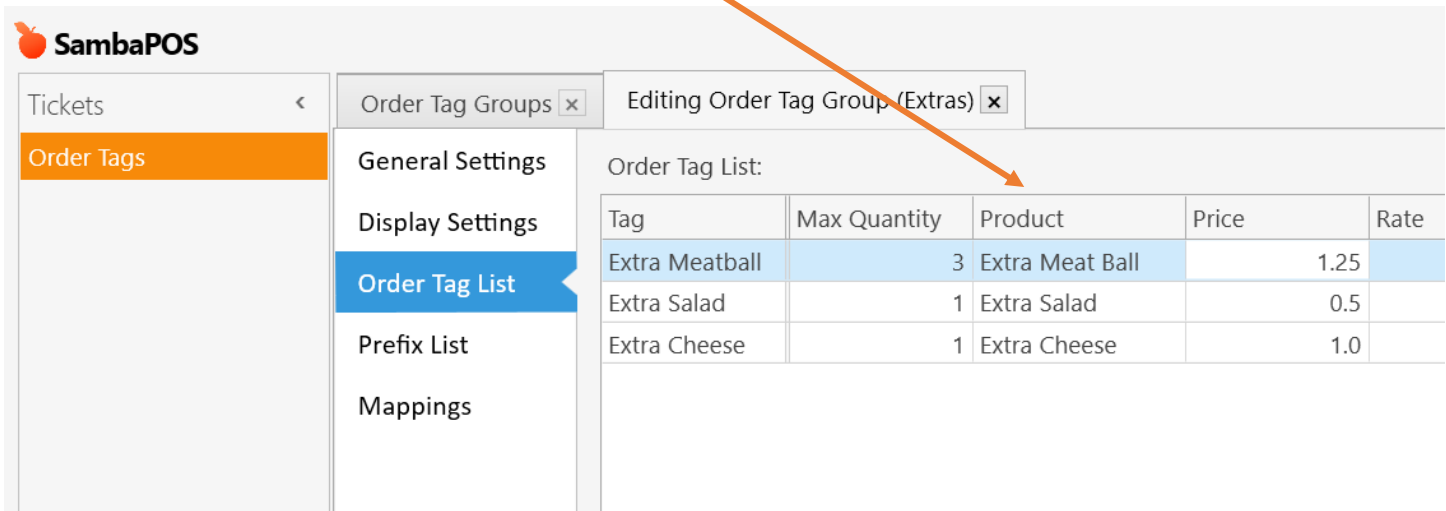
Order Tag	Item Type	Item Name	Quantity	Unit
	Product	Meatball	0.011	Batch

[Add Inventory Item](#)

[Add Product](#)

[Delete Line](#)

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's a sidebar with 'Tickets' and 'Order Tags' (highlighted in orange). The main area has a top bar with 'Order Tag Groups' and 'Editing Order Tag Group (Extras)'. Below this is a menu with 'General Settings', 'Display Settings', 'Order Tag List' (highlighted in blue), 'Prefix List', and 'Mappings'. The 'Order Tag List' section contains a table 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.

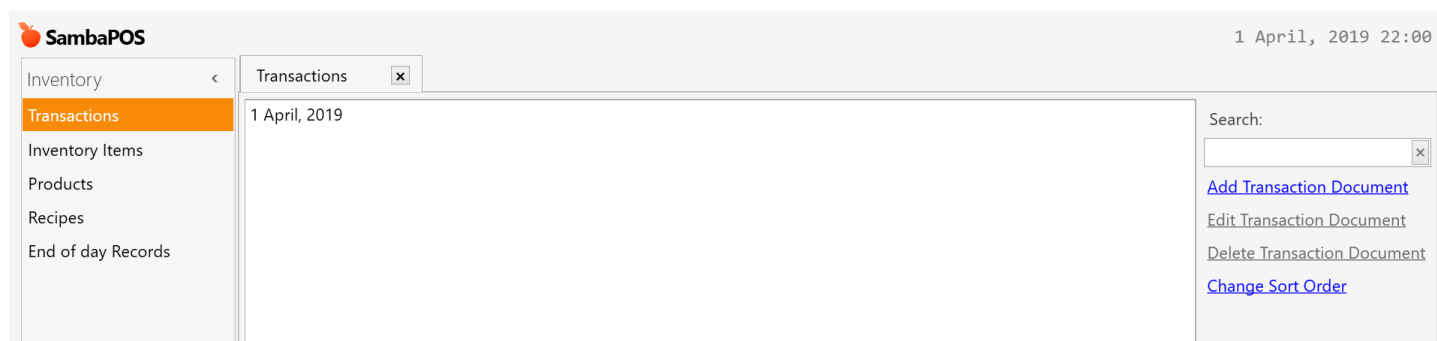
*** This is ideal for businesses that serve "build your own burger", "build your own sandwich" and "build your own cocktail" etc. ***

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](#).

Transactions x Editing Transaction Document (1 April, 2019) x

Date: 04-01-2019 10:3

Document No:
1 April, 2019

Inventory Items: [Add](#) [Delete](#)

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		v

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

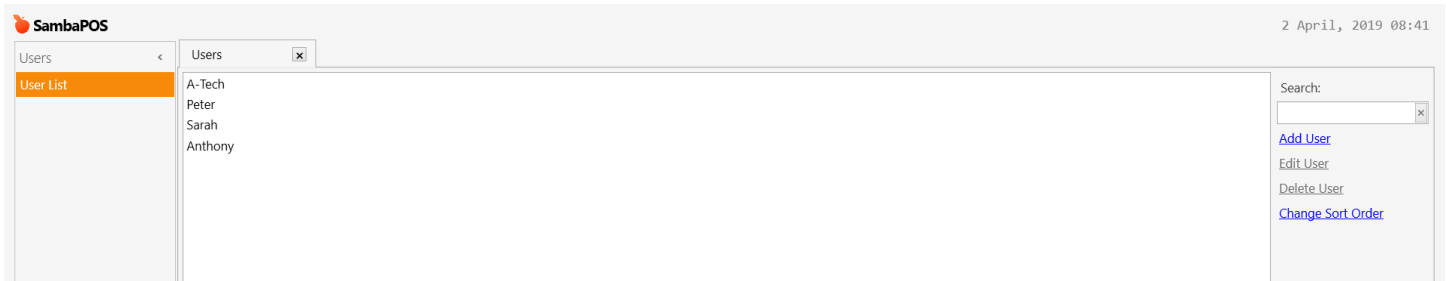
Inventory Consumption – items sold, consumed or gifted

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

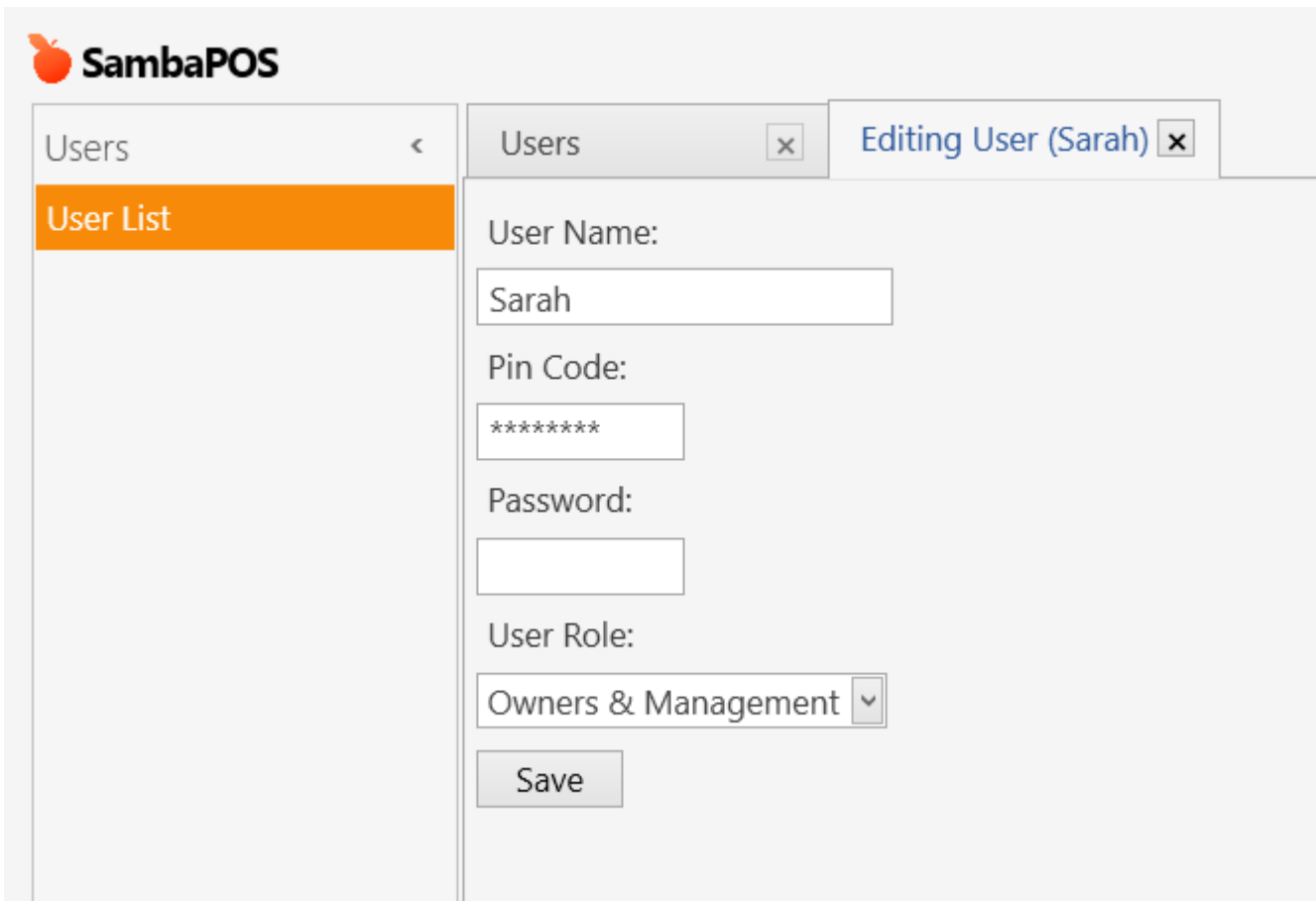
2.10 Users

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

Settings

SambaPOS News

main for SambaPOS

Database Backups

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Database Backups

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 12:52	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 18:00	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 11:00	Backup with Rule
GenData		SQL	7 March, 2019 10:00	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

Backup Database Restore Database Restore from Zip Display Backup Location

Keyboard Anthony Main Menu

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:

C:\Samba Backups 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.

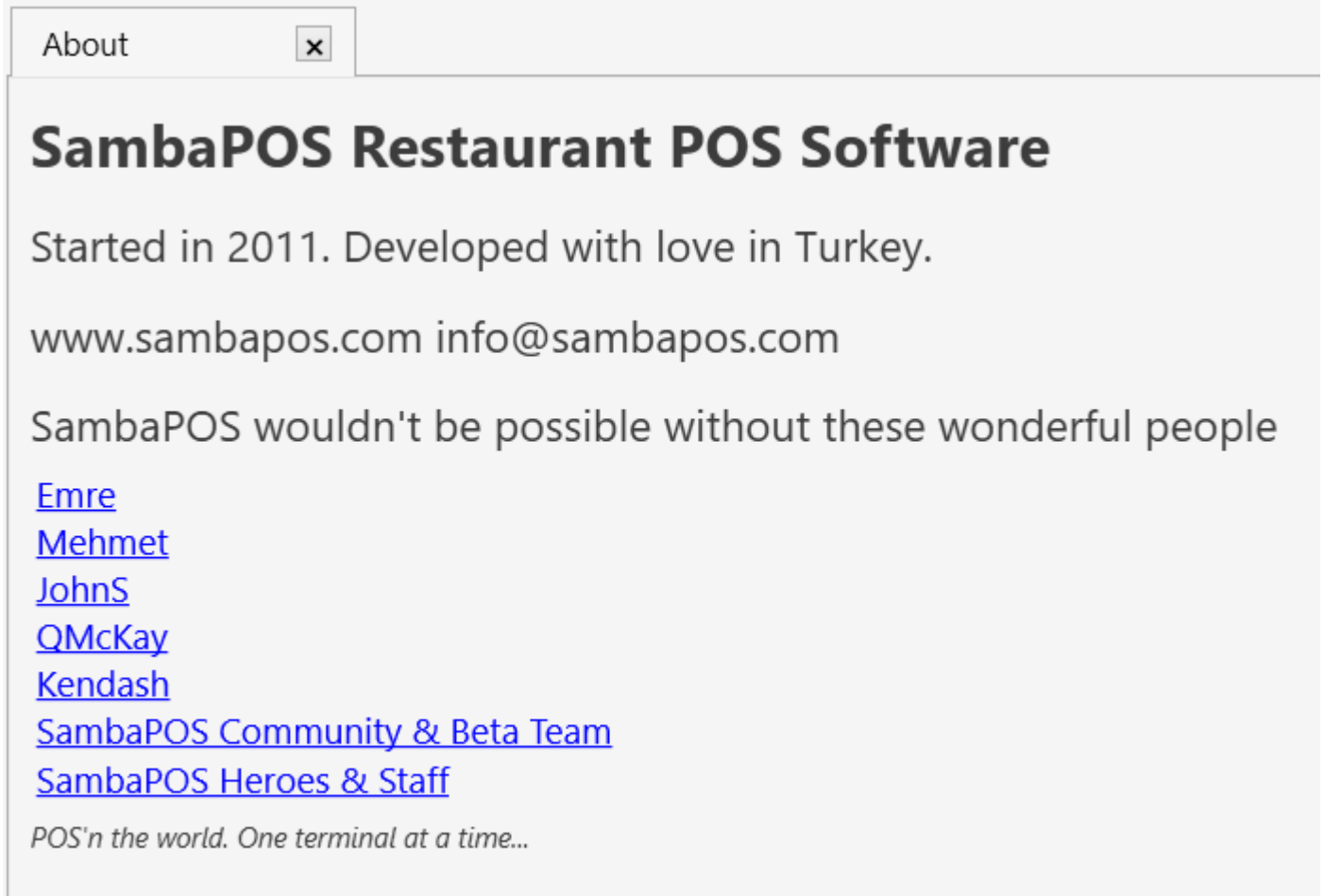
☒ Enable alternative Restoration Method

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 ***

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