

# EPoS

Order creation and product search.

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# Summary

The EPoS is designed to work alongside a Hardware integration. For more information on that, click [here](#).

## Order Management

This is the default view.

Within the POS, users can:

- create and search for Sales Orders
- create and search for Customers
- search for products
- navigate categories
- view stock levels
- view item upsells

## Voucher Balance

This section may be used to review voucher balance.

## Performance Report

Within this section, users can review their daily and weekly performance against targets set in [Site Settings](#).

## End of Day

This section may be used to record end of day takings; it is an essential part of the cashing up process.

# Adding a New Sales Order in the EPoS

# Adding a Customer to a Sales Order in the EPoS

When raising an order in the EPoS, you can choose to add a new customer by entering their details manually, or you can search for an existing customer that is already registered with you.

## New Customer

You can enter new customer details to a new order in the EPoS by simply clicking "Add Customer". Once you have done this you will be able to add the following details;

- Title, first name and surname.
- Address, postcode and country.
- "Where did you hear about us?"
- Contact details including Email address, telephone number and alternate telephone number.

Contact preferences for the customer can be updated using the "Contact Preferences" button under the email address.

### Contact details

testcustomer@iconography.co.uk

Contact Preferences

Within the contact preferences you can select which public and private mailing groups to add them to (these will be pulled from the [Manage Groups](#) screen).

Edit contact preferences

**Public mailing groups:**

Newsletter

Special Offers

**Private mailing groups:**

Gold Customers

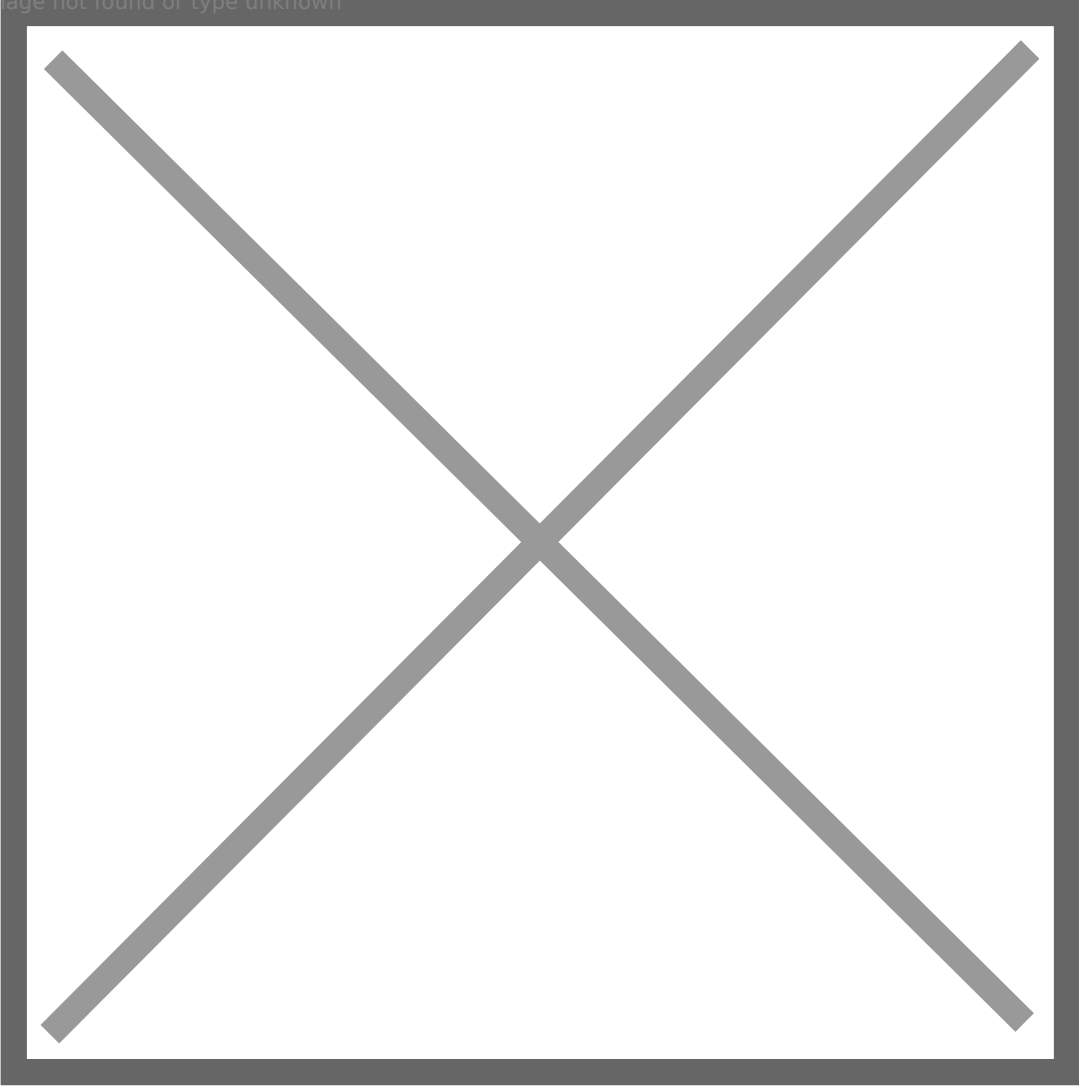
Private VIP group

Once you are happy that the details have been entered correctly, click "Update".

## Existing Customer

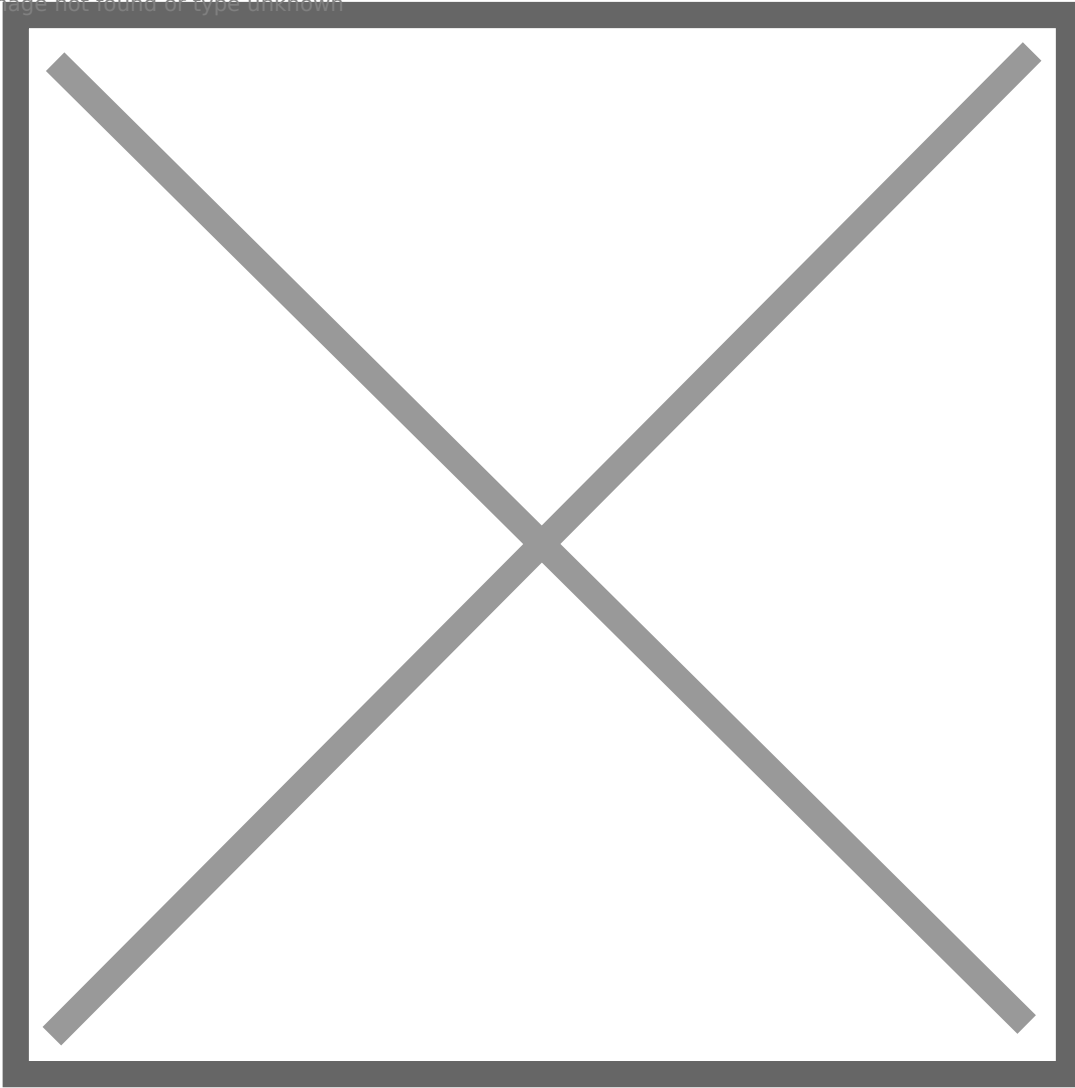
1. Click "Create New Order"

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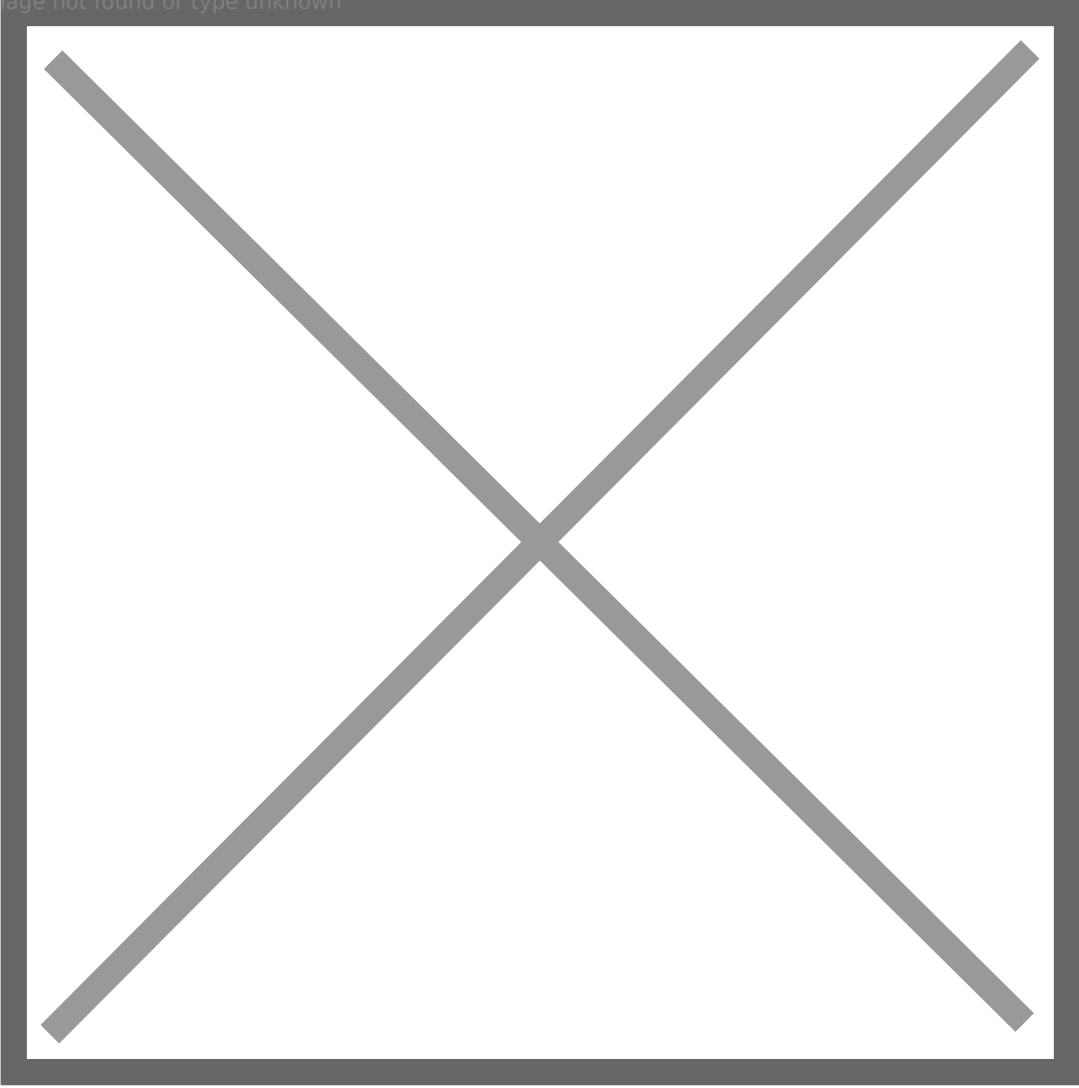
2. Click "Add Customer"

Image not found or type unknown



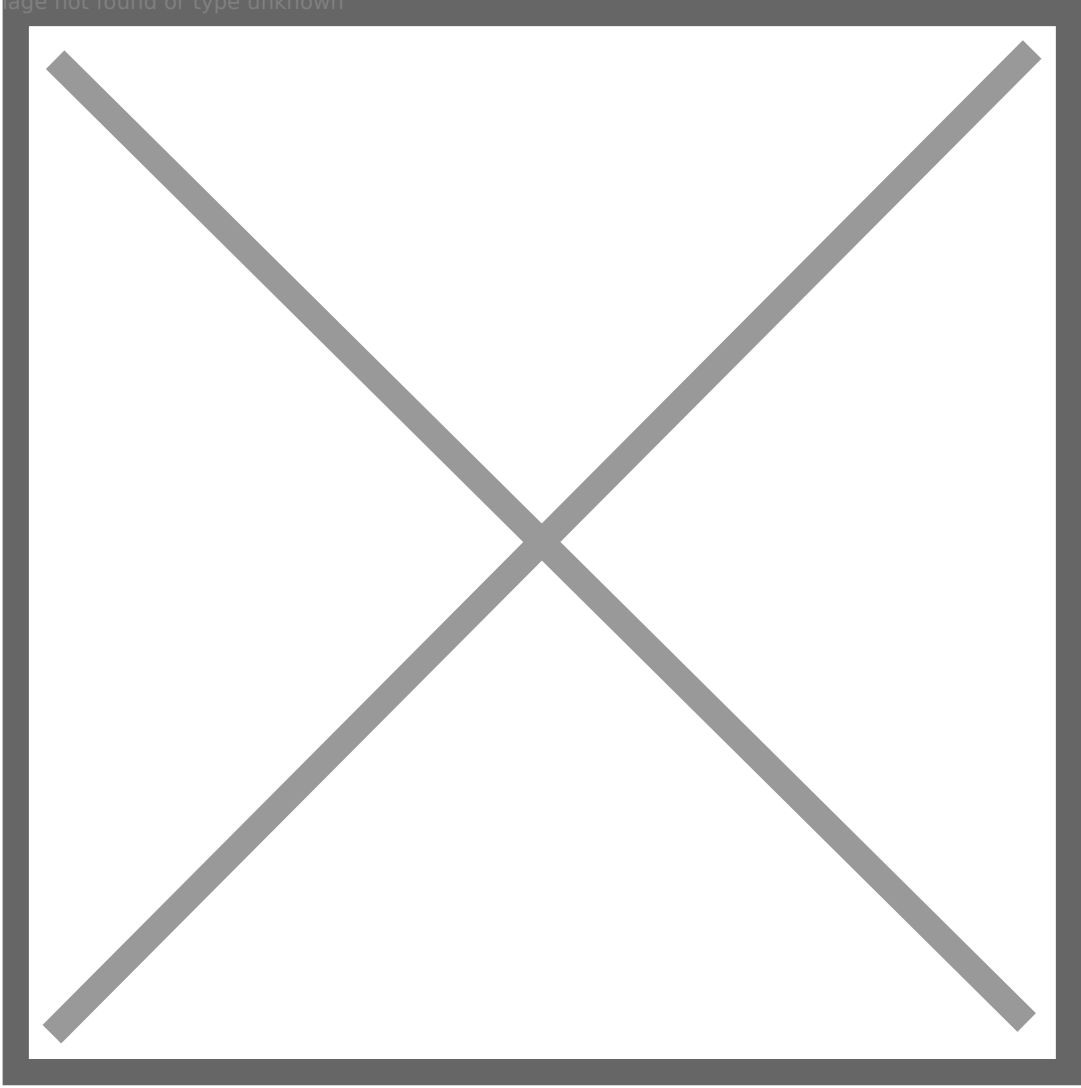
3. You can search for an existing customer using their surname, postcode, email or loyalty code.

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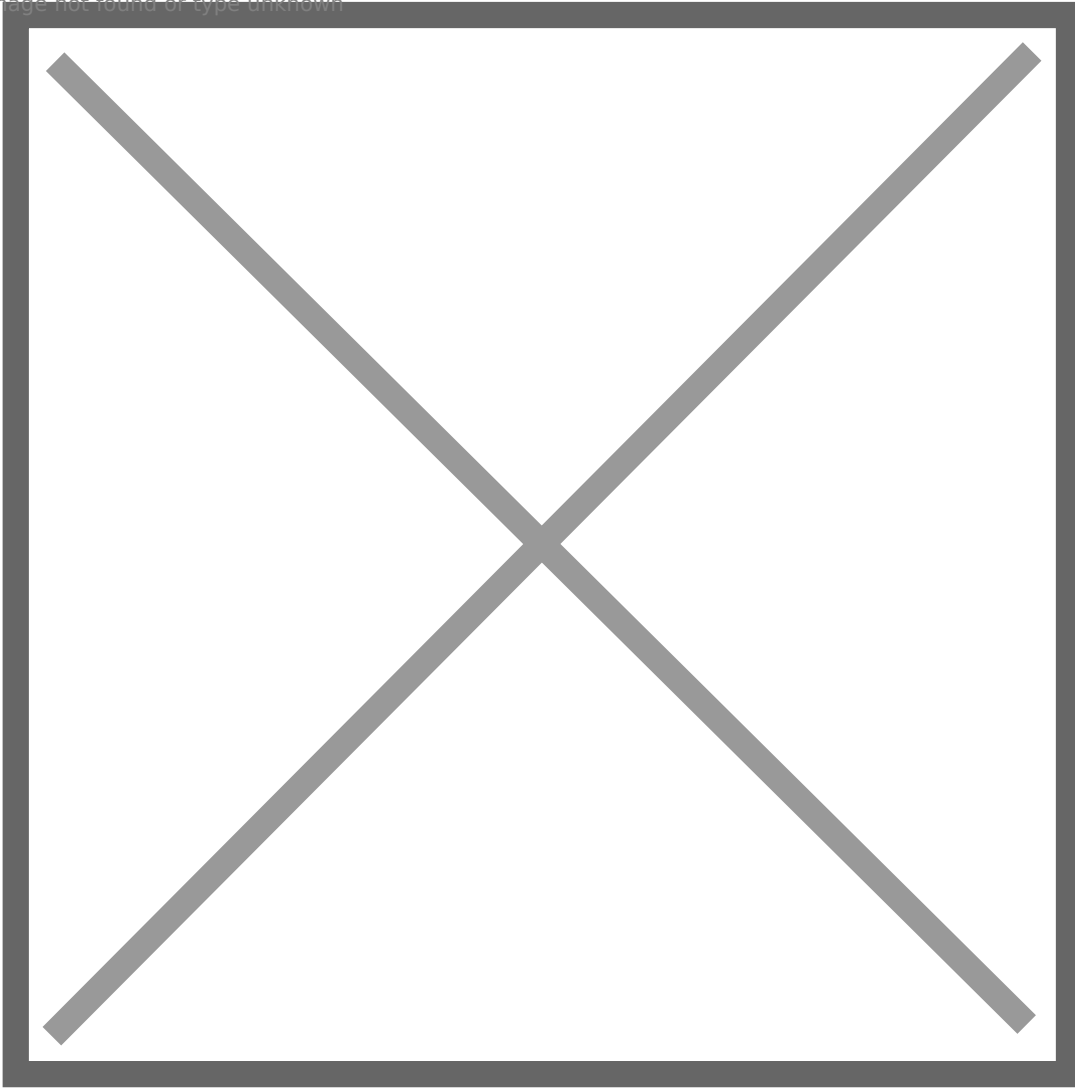
4. Click search to return matching results.

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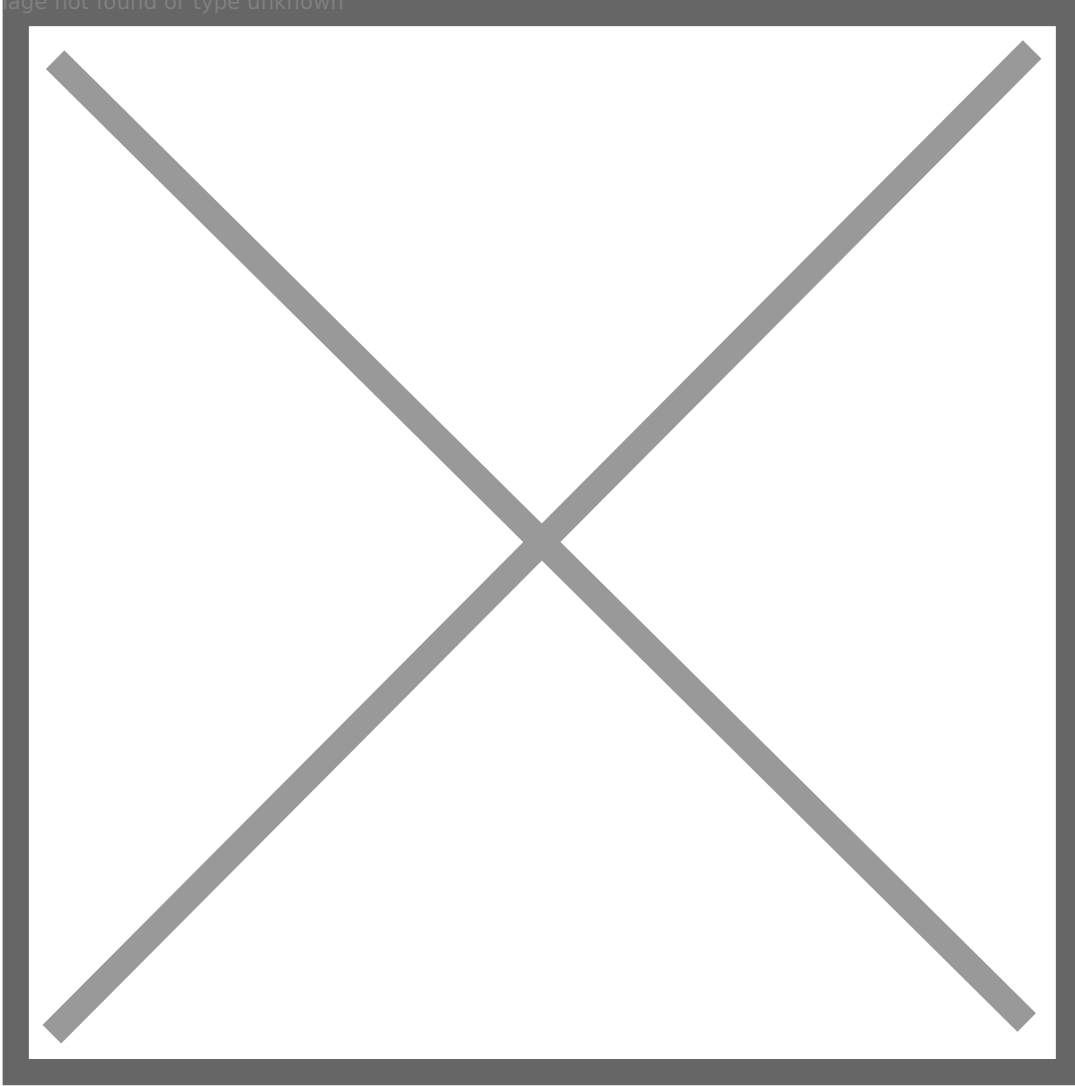
5. Click "add" when you have found the appropriate customer.

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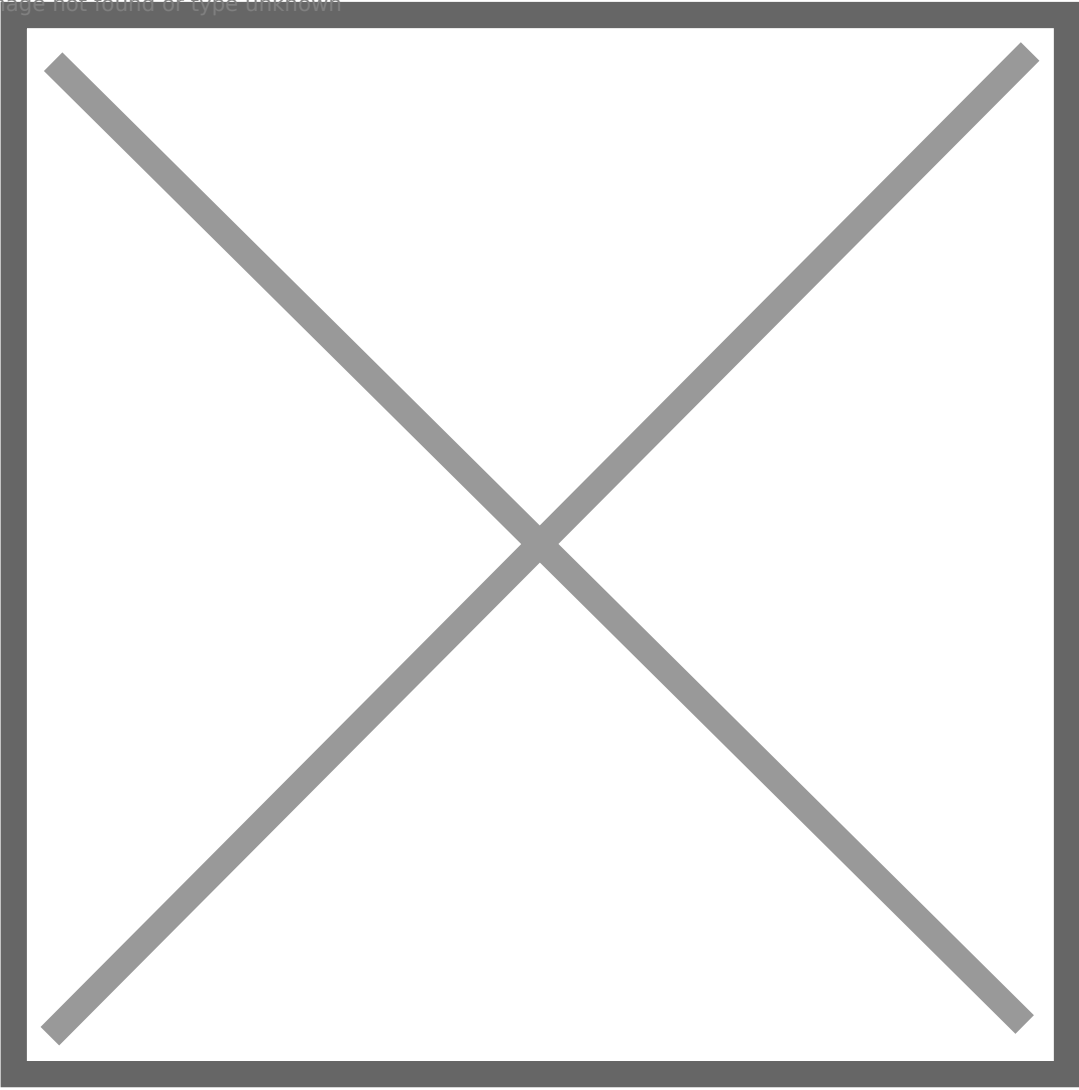
6. The customer, along with all of their contact details, has been added to the order successfully.

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7. You can choose to amend or add missing details manually if required.

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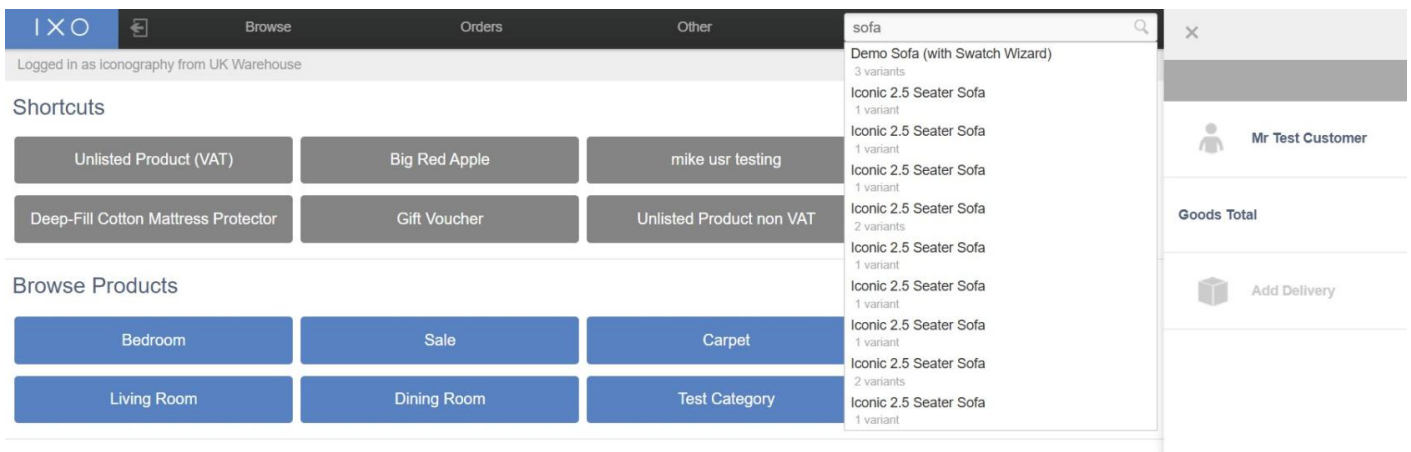
# Adding a Product to a Sales Order in the EPoS

There are three methods of searching for, and ultimately adding, products to an order in the EPoS;

1. Search field.
2. Browse Products.
3. Barcode scanners.

## Search Field

You can easily search for a product by entering an appropriate term or SKU in to the "Search Products" field. This will return suggested results as you type, or you can hit return to see all of the results.



## Browse Products

Under "Browse Products" you will be able to browse through your categories (listed in blue boxes), just as a customer would on the front end of your site. From here you can enter the appropriate categories and sub-categories to find the appropriate product that the customer wishes to purchase.

You can browse through categories by hovering over "Browse" in the EPoS navigation bar at the top. This is essentially the same as browsing using the blue category boxes.

## Barcode Scanners

If you have barcode scanners, these will allow you to scan the product that the customer wishes to purchase, which will automatically add the product to the order, without having to search for it.

Scanning a product will add a new line if one doesn't exist, or change the quantity of a line if that product is already part of the Sales Order

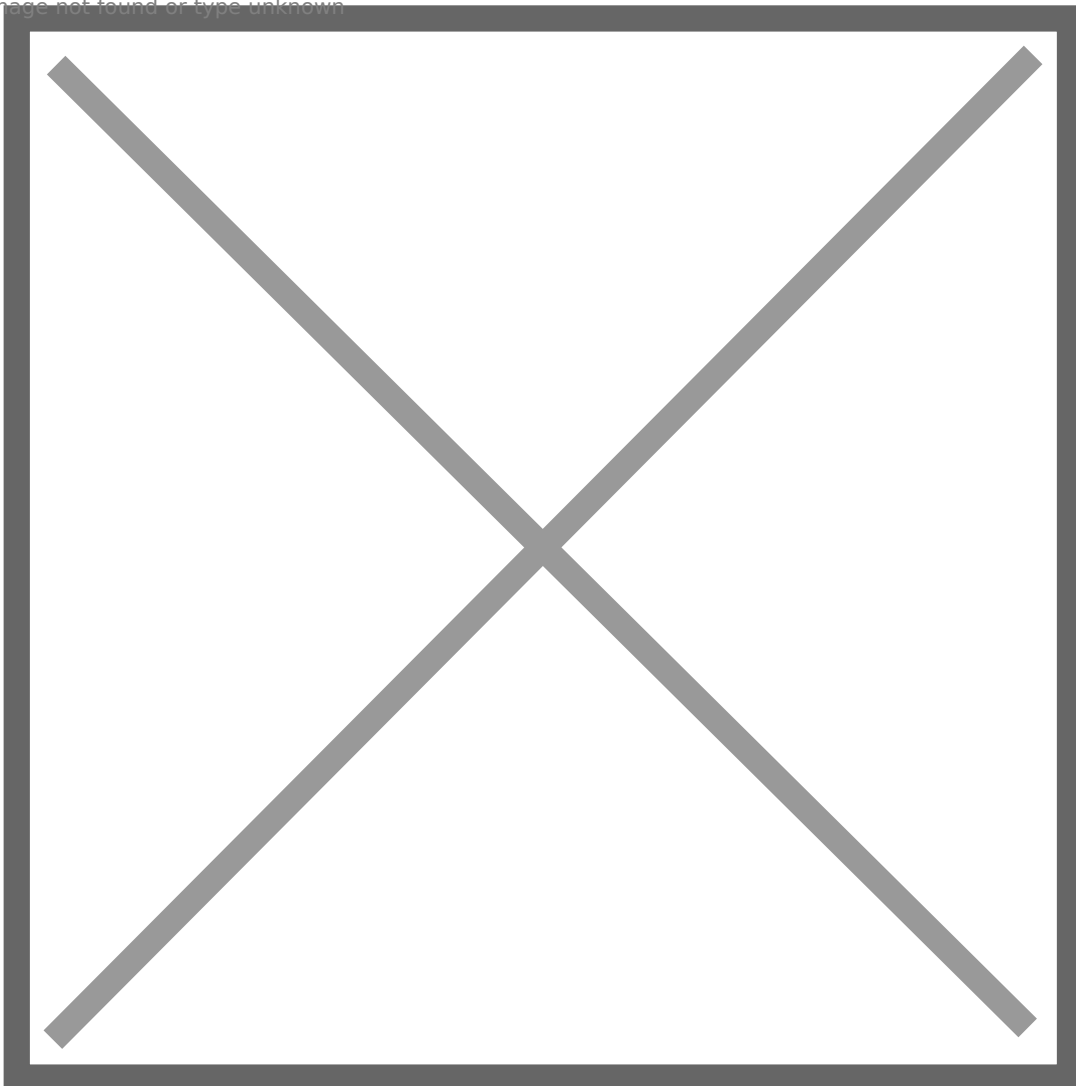
To add the same product on a new line, you will need to manually add it to the order via the 'add/order' button

## Adding a Product

Adding a product manually (by clicking the button in the POS screen) will always add a new sales order line, even if that line already exists on the Sales Order.

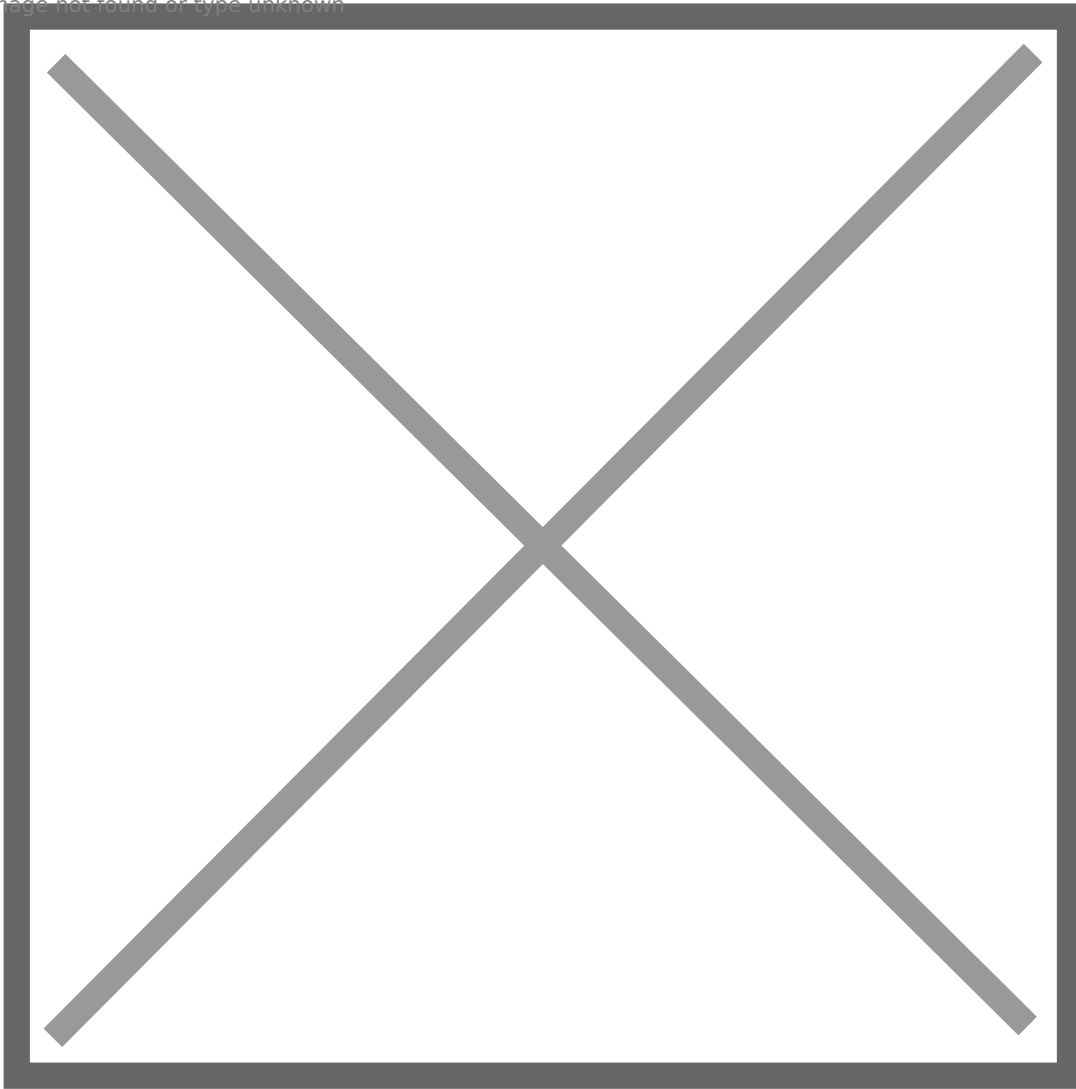
1. Choose the category you wish to search in.

Image not found or type unknown



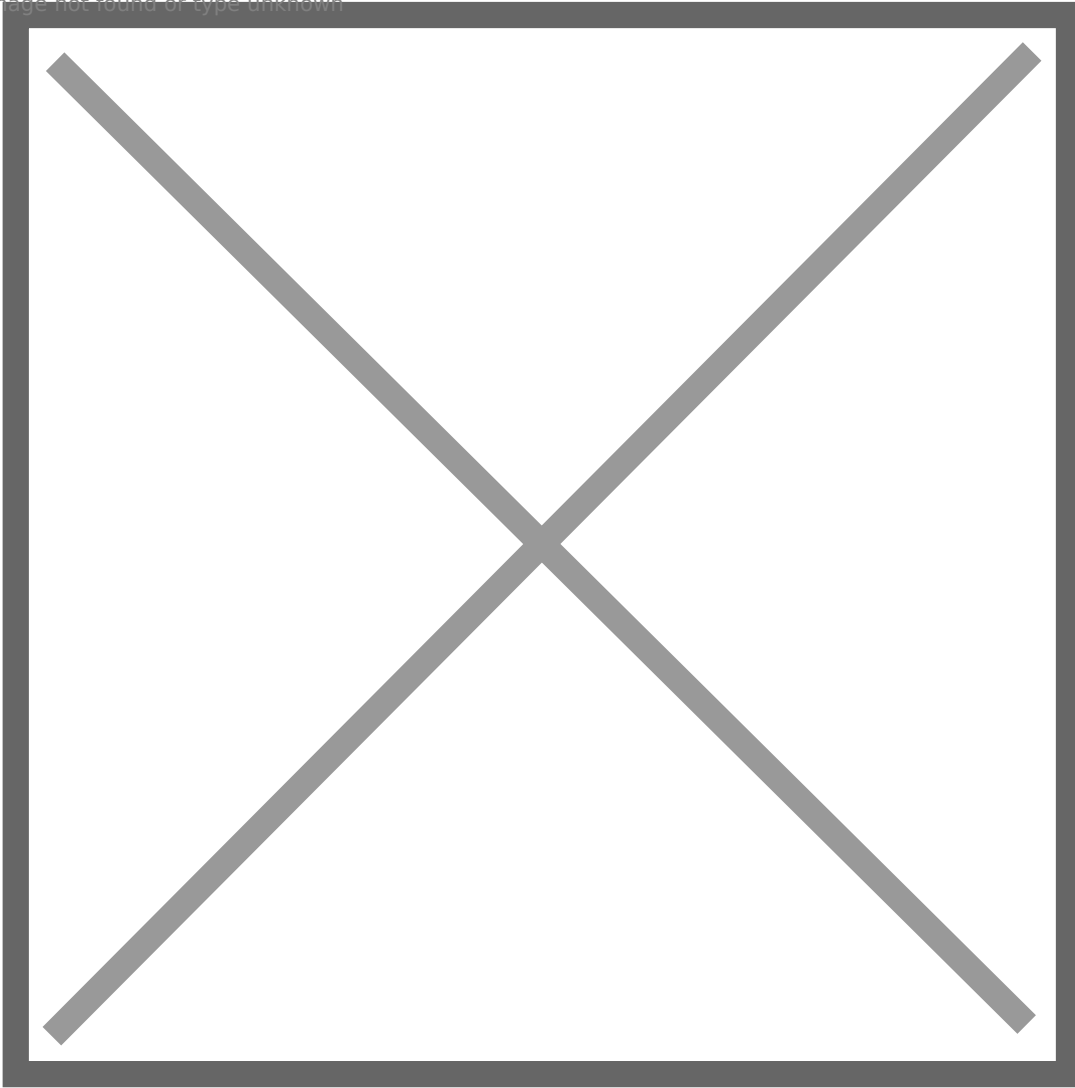
2. Choose the sub-category you wish to search in.

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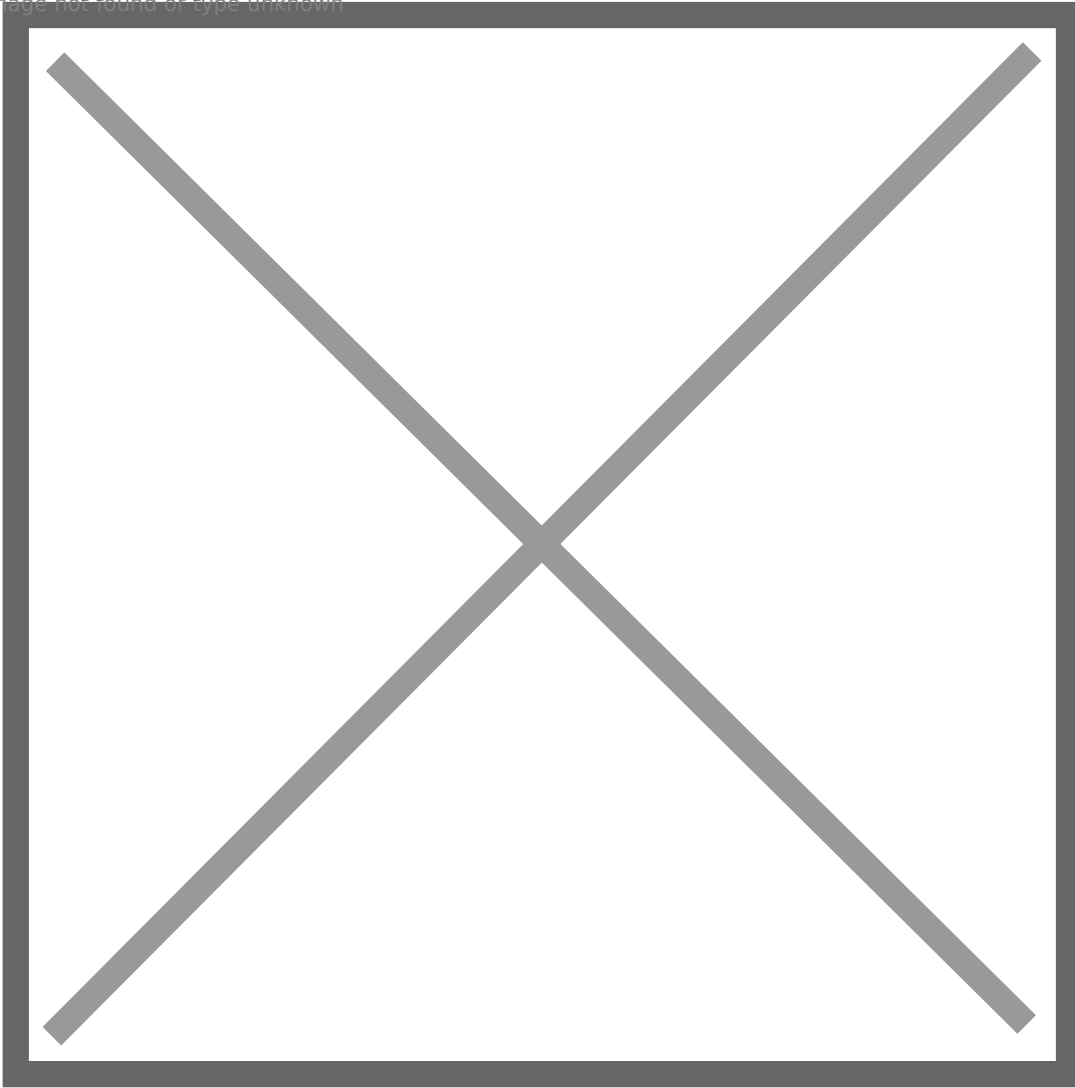
3. You may wish to search within further sub-categories, or you can simply add click "ADD" on a product within the chosen category.

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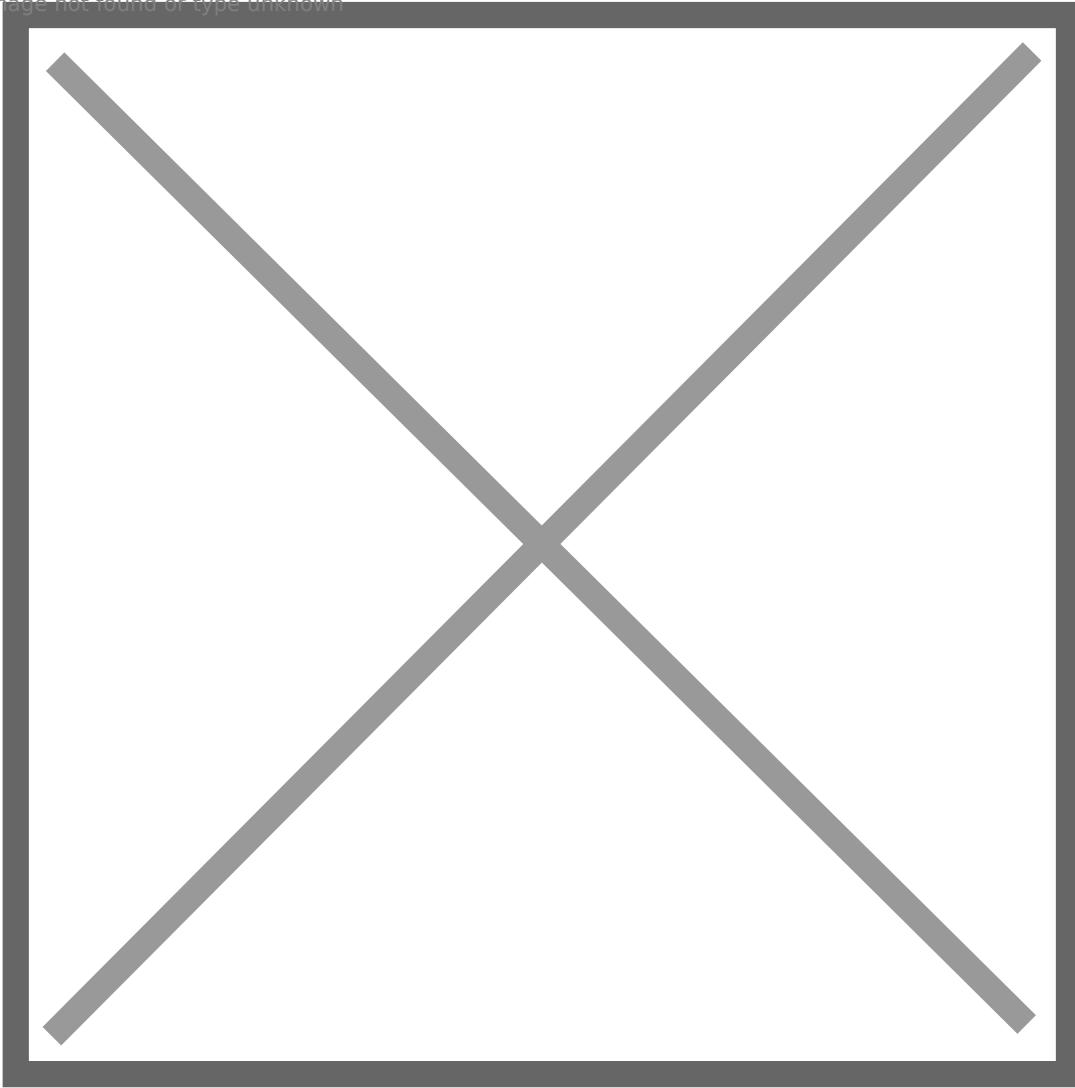
4. From here you will be able to select the from the available variants, as well as any Unique Stock Records (USR) that are currently available from stock.

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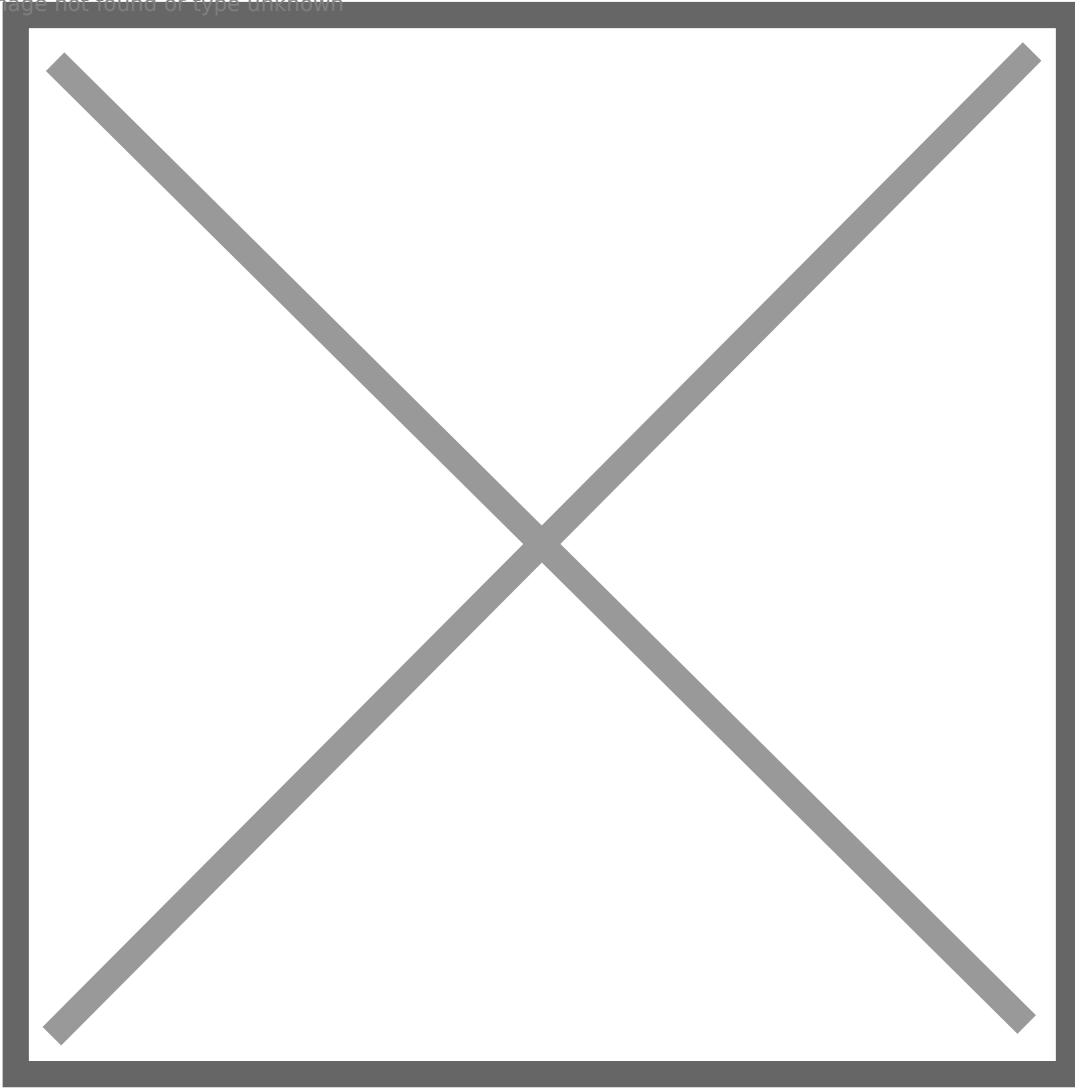
5. Selecting a variant will allow you to proceed to choose from the available options.

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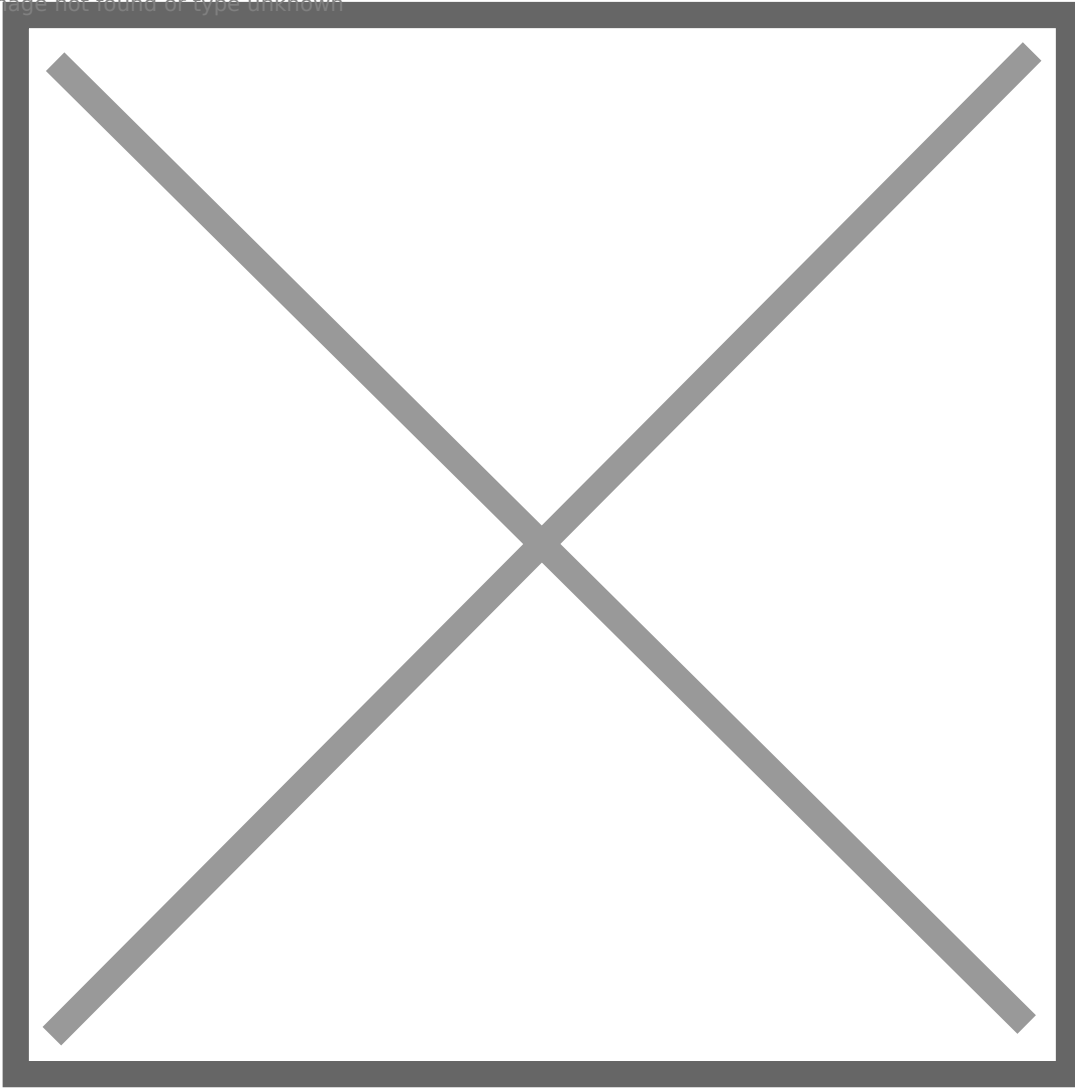
6. The final step will be to add any custom options. If no custom options are required, click "add".

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7. The product has now been successfully added to the order.

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Product availability is detailed within the EPoS. For a full explanation of this terminology, please click [here](#).



**Pineapple (standard variants)**  
from £2

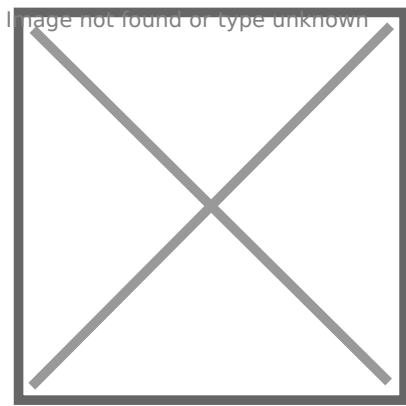
98 available  
115 unallocated  
+149 available elsewhere

**ADD**

# Adding Add Ons to a Sales Order in the EPoS

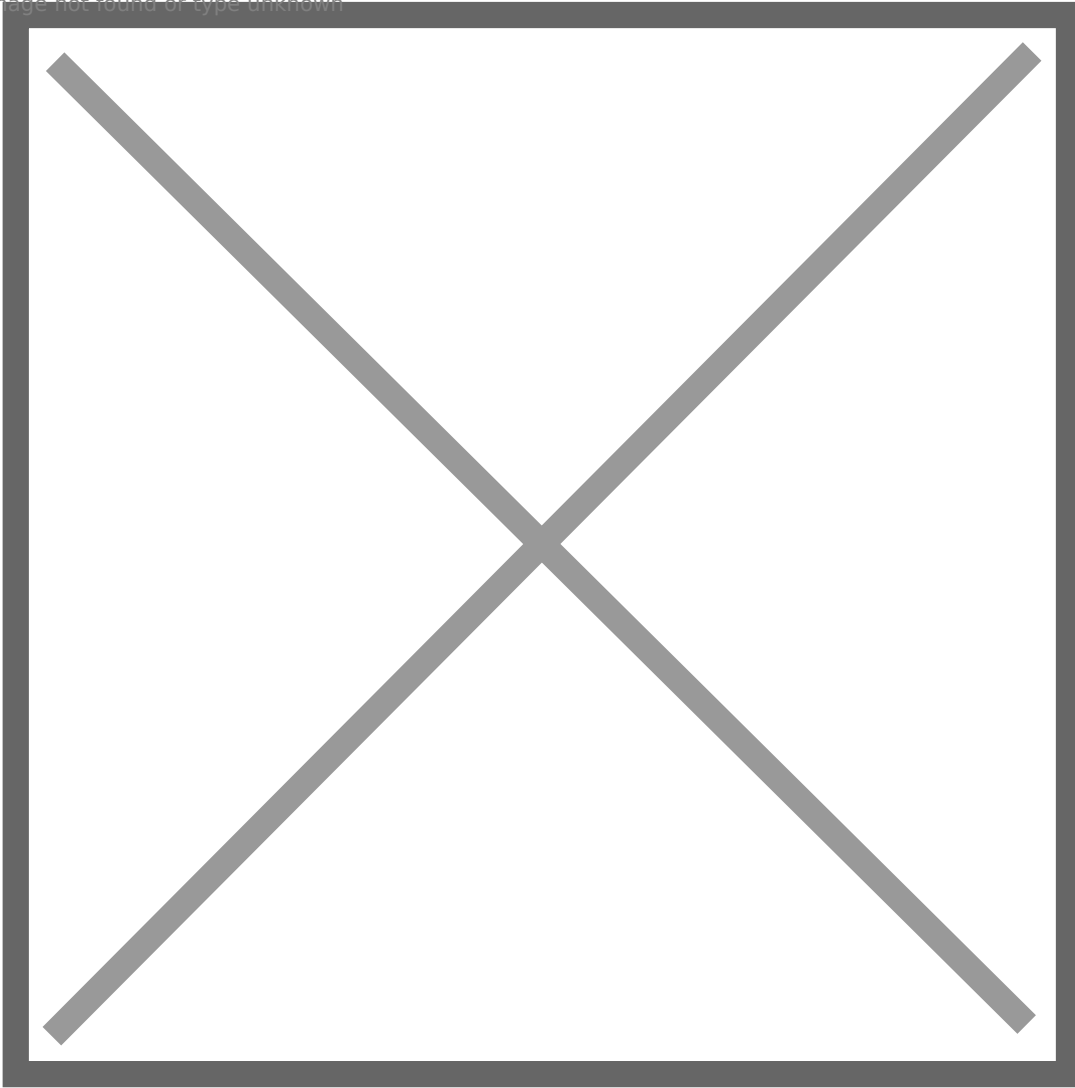
If a product has addons assigned to it within the CMS, these can be selected as part of the ordering process within the EPOS.

1. Click "ADD" on the appropriate product when in an order in the EPoS.



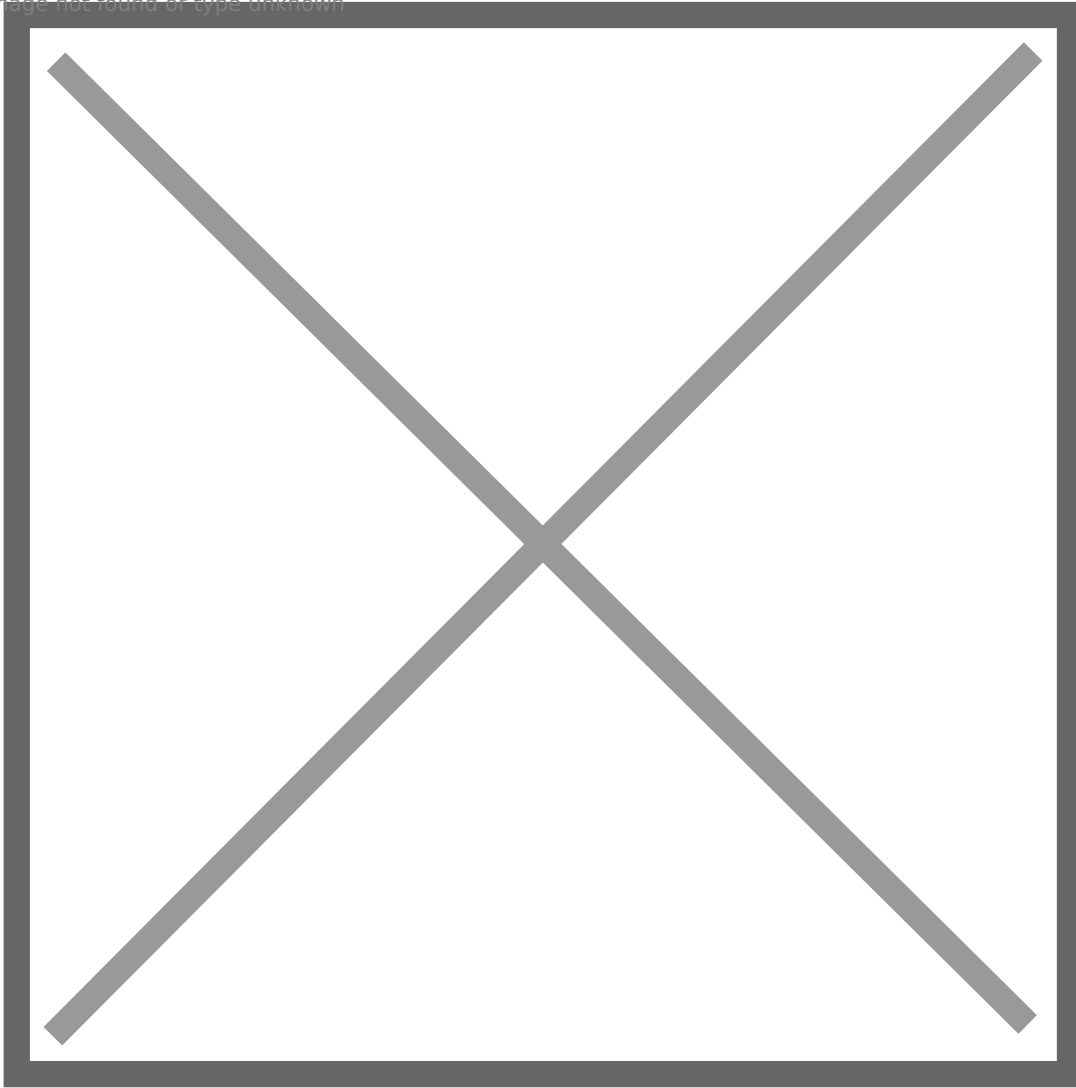
2. If there are multiple variants available you will see a popup where you can select the appropriate variant.

Image not found or type unknown



3. If the product has addons set up, these will be listed as the next step in the popup.

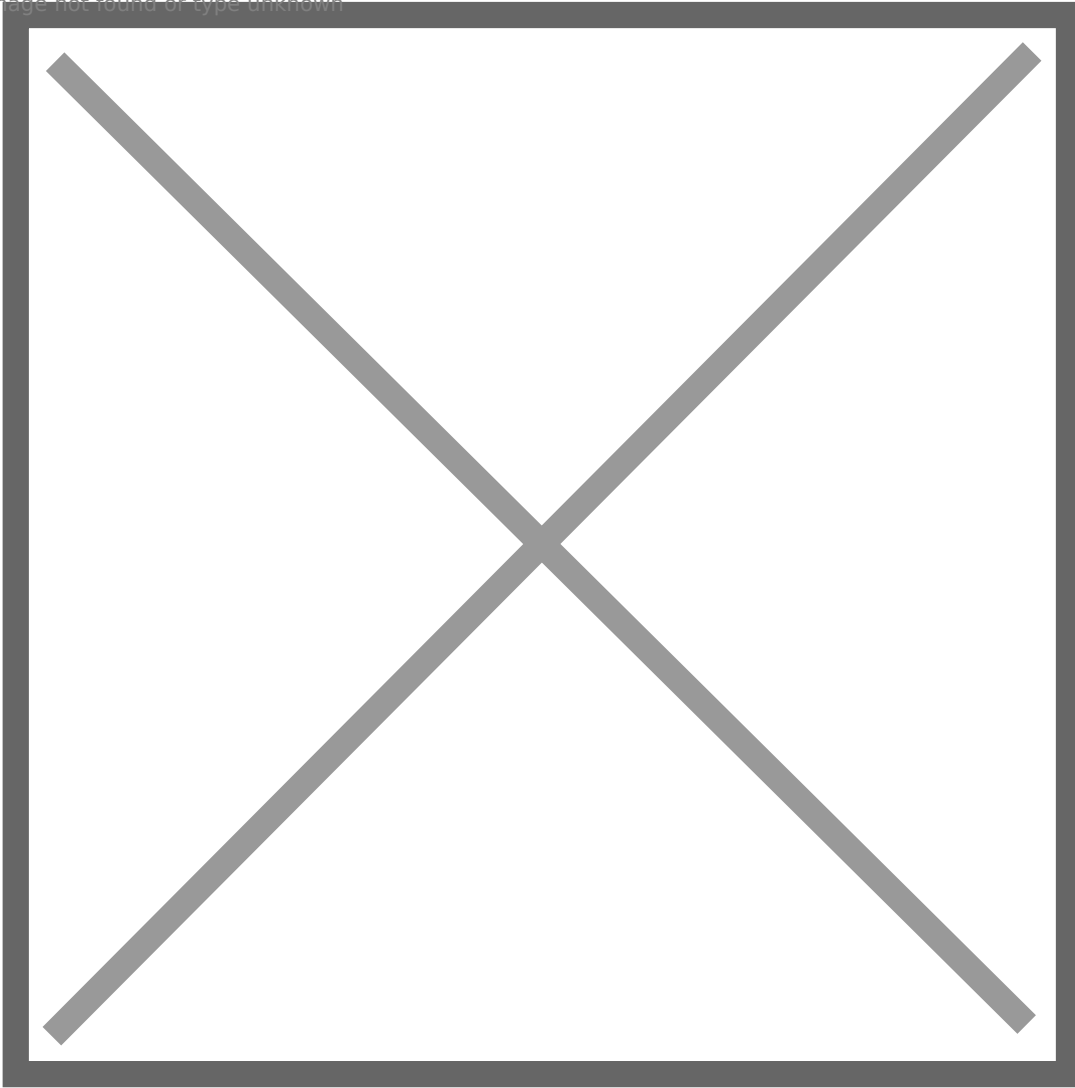
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Tip: If ordering a standard product, addons are chosen in the next step. If ordering a made to order product, the addon will be one of the final steps after selecting made to order options.

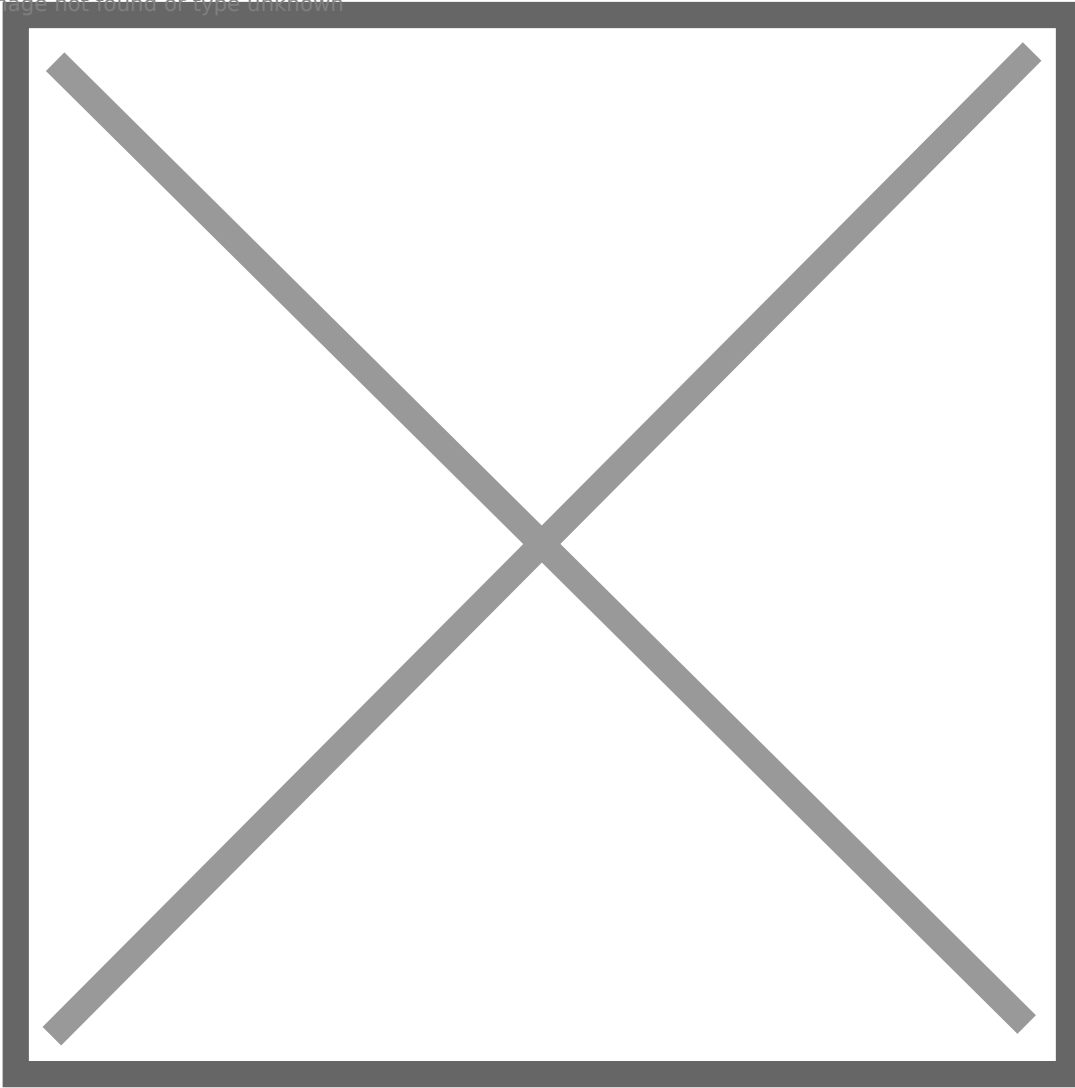
4. Clicking the drop-down arrow will present all available addons, as they have been set up in the CMS.

Image not found or type unknown



5. After selecting the appropriate addon, you will be presented with the addon description, as set up in the CMS. Click "Continue" to add the product and addon to the order.

Image not found or type unknown



6. Both the product and addon have now been added to the order.

Image not found or type unknown



7. The addon can be amended by using this button.



Draft



Add Customer



Purbeck Reclaimed Wood Painted Lamp Table  
(301635)

£196.00

Choose addons



Yumi Nest of 2 Tables in White  
(1160825)

~~£184.00~~  
£0.00\*

Item 1:  
Basket Addons: Basket Addon (2)

Change addons

Basket Addons: Basket Addon  
(2)

£2.00

Goods Total

£382.00



Discount

- £185.00

# Adding Upsells to a Sales Order in the EPoS

The screenshot displays the EPoS interface with a navigation bar at the top containing 'Browse', 'Orders', and 'Other' tabs, and a search bar labeled 'Search Products'. The main content area is titled 'Upsells' and features two product recommendations:

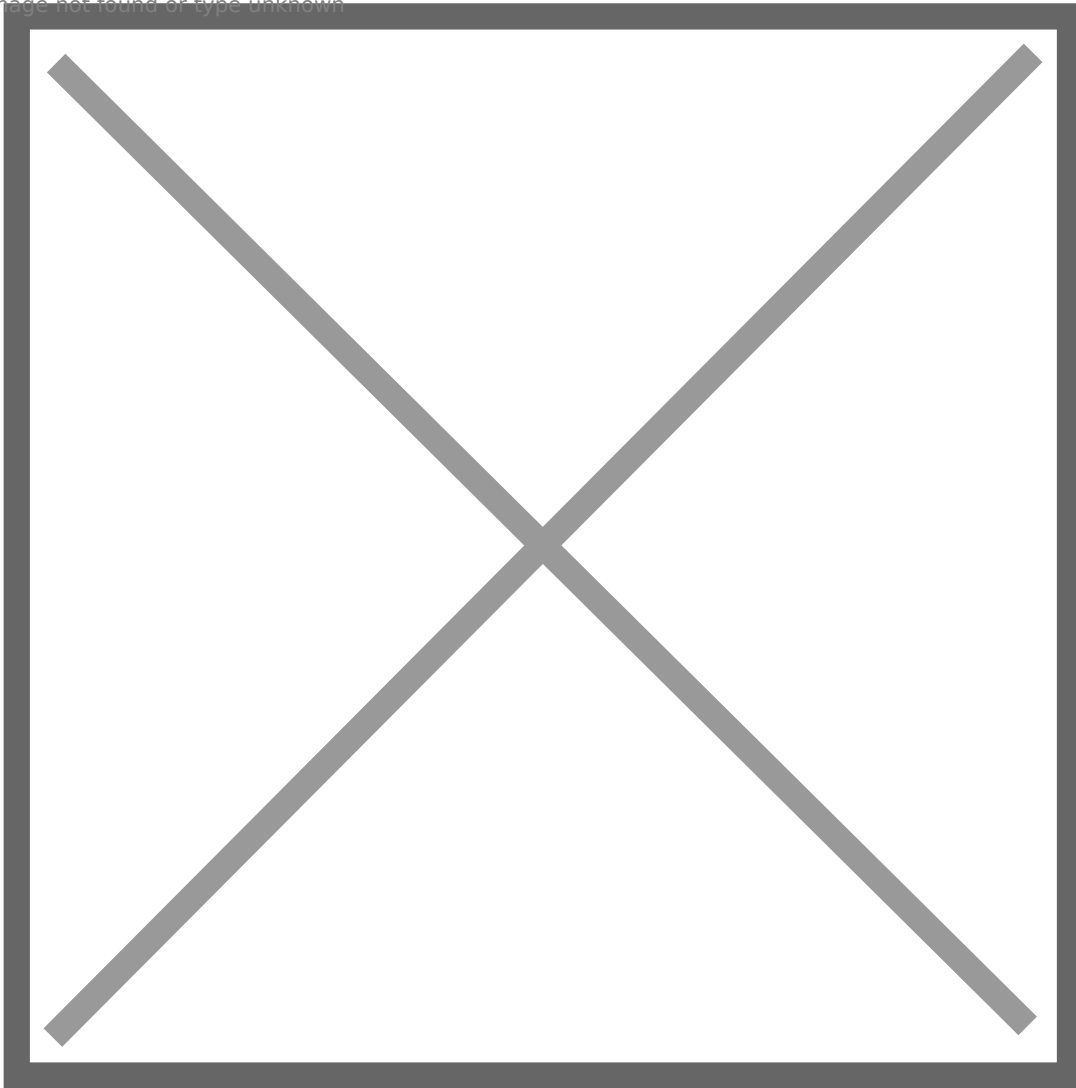
- Atlantic Oak High Footend Bedstead**: Accompanied by an image of a wooden bedstead. The price is listed as 'from £220'. Availability is shown as '68 available' and '+277 available elsewhere'. A blue 'ADD' button is positioned below the text.
- Spalding Basketball**: Accompanied by an image of a Spalding NBA basketball. The price is listed as 'from £1'. Availability is shown as 'available to order' and '+1000 available elsewhere'. A blue 'ORDER' button is positioned below the text.

On the right side of the interface, a large image of a carved jack-o'-lantern pumpkin is displayed. A small grey button with an upward-pointing arrow is located to the left of the pumpkin image.

# Adding a Discount to a Sales Order in the EPoS

1. Once a product has been added to an order, a discount can be added by clicking "Apply Discount".

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2. There are two discount options available; promo code (if there is one available from your promotions) and custom discount.

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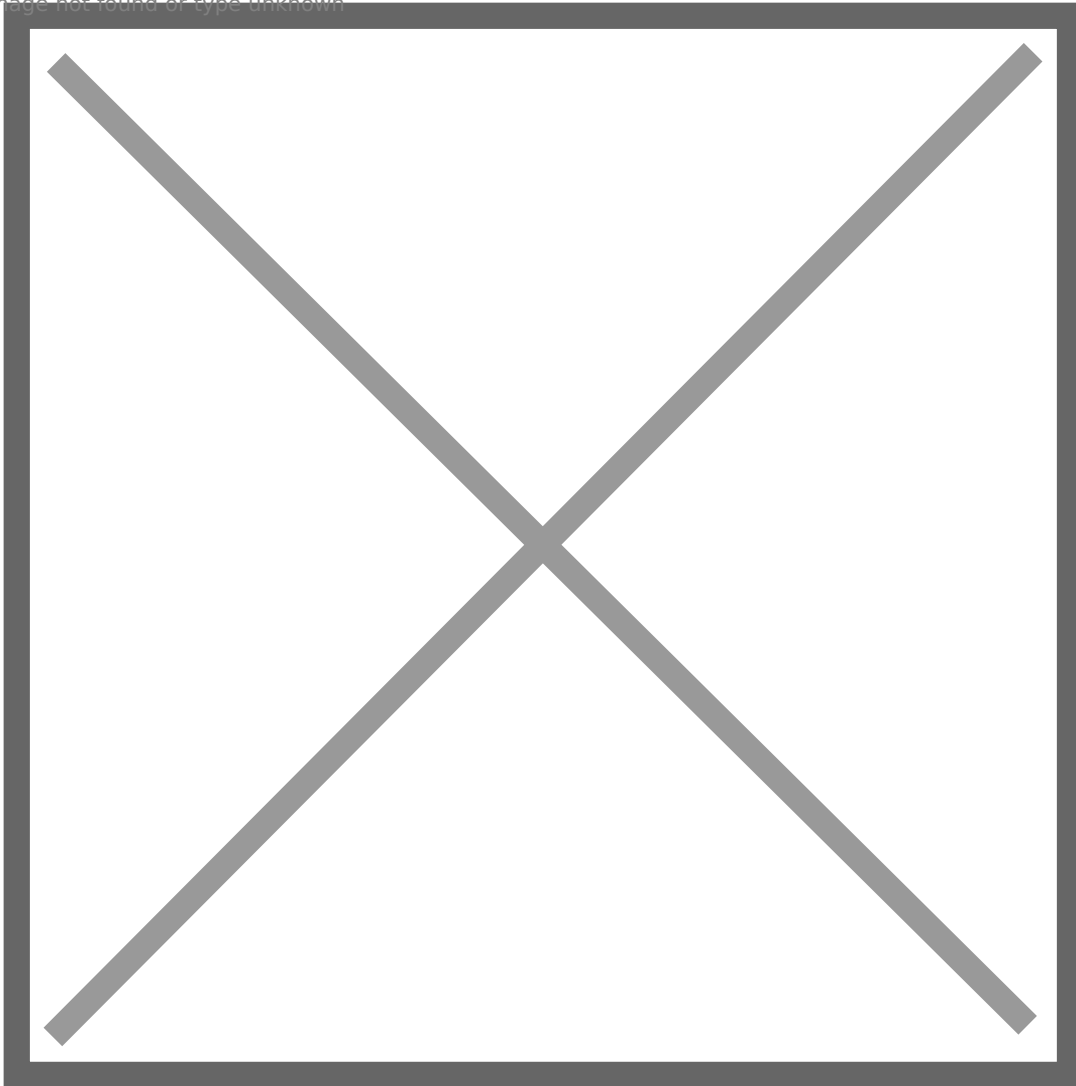
3. If adding a custom discount, a reason must be entered. You can choose from Staff Discount, Goodwill, Damaged or Other.

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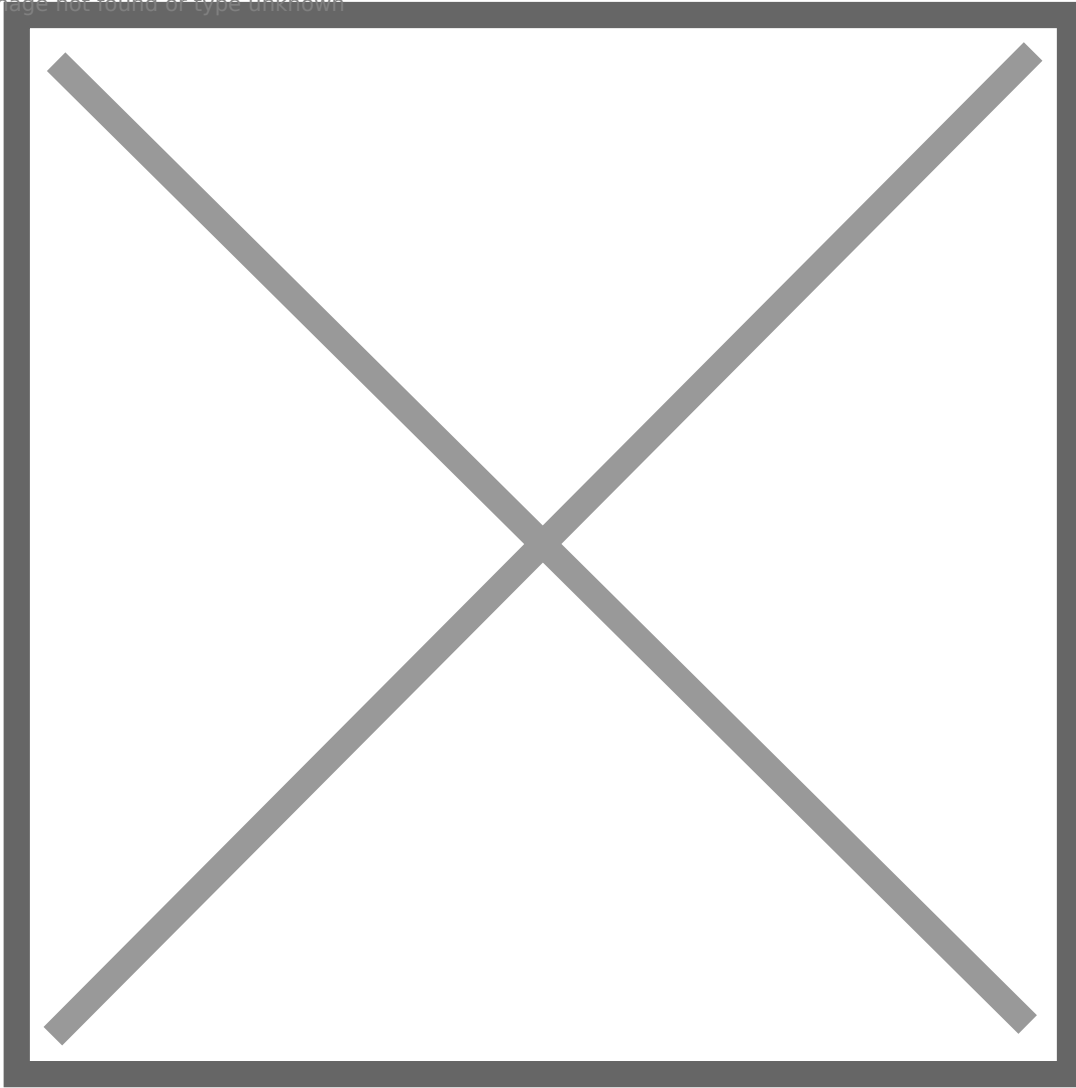
4. You can also select if you would like to apply the discount from the overall goods total, or from a specific product on the order. In this instance, we're going to apply a discount to the whole order.

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5. The next step is to choose the method of discount. You can discount be a specific amount, by a percentage or set to a specific price.

Image not found or type unknown



6. Once you have selected the method of discount, you will need to enter the amount you wish to discount by, or the specific price you would like to set the product to. As we are discounting by a percentage in this example, I'm going to type "10" to apply a 10% discount.

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7. To apply the discount, an authorisation (Auth) pin will be required.

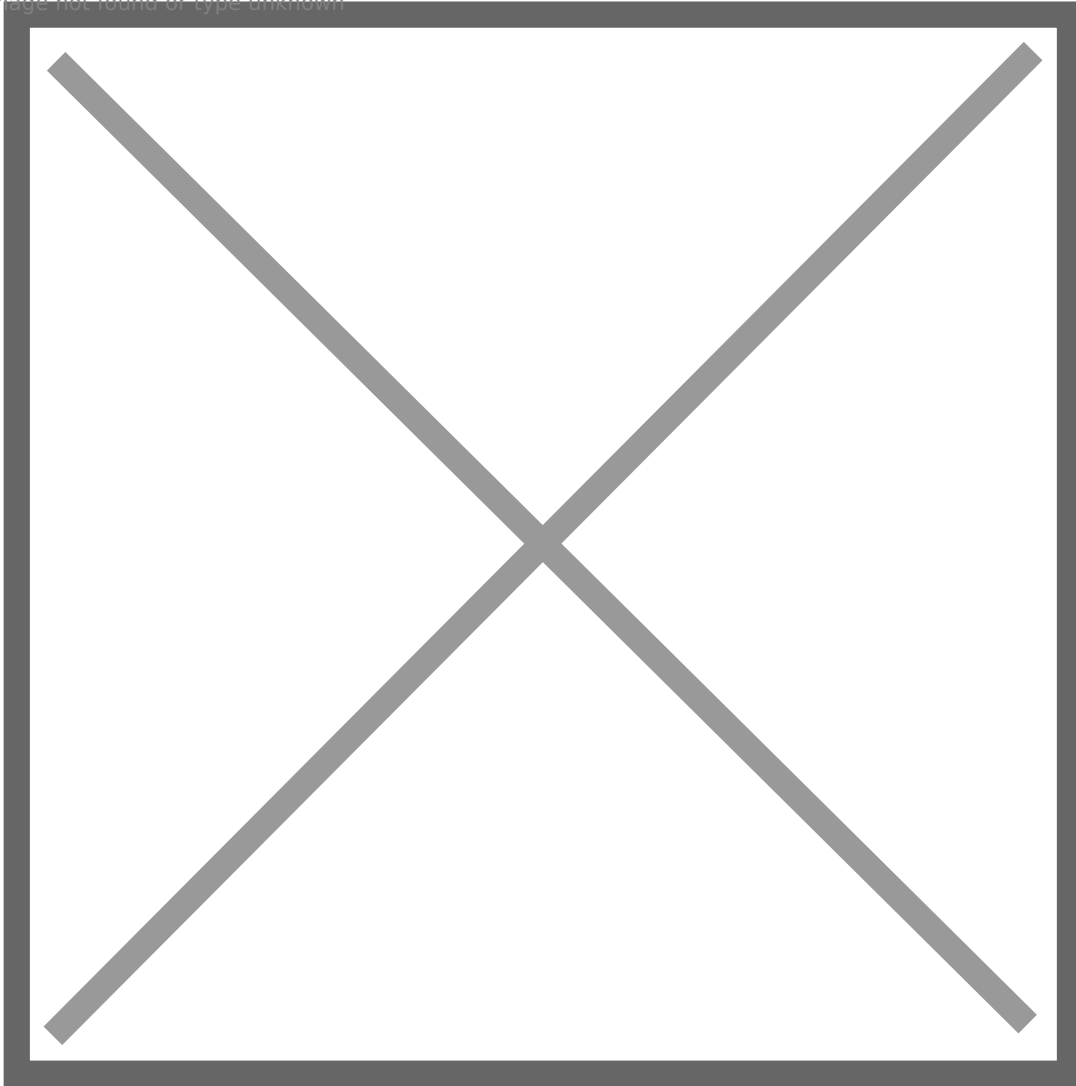
Note: this will not be required if the total amount discounted (including promotions) is less than the percentage defined in Site Settings under 'Maximum discount without authorisation limit per order (percentage)'

Image not found or type unknown



8. If the Auth PIN was correct, the discount will be applied and you will receive a "Success" message.

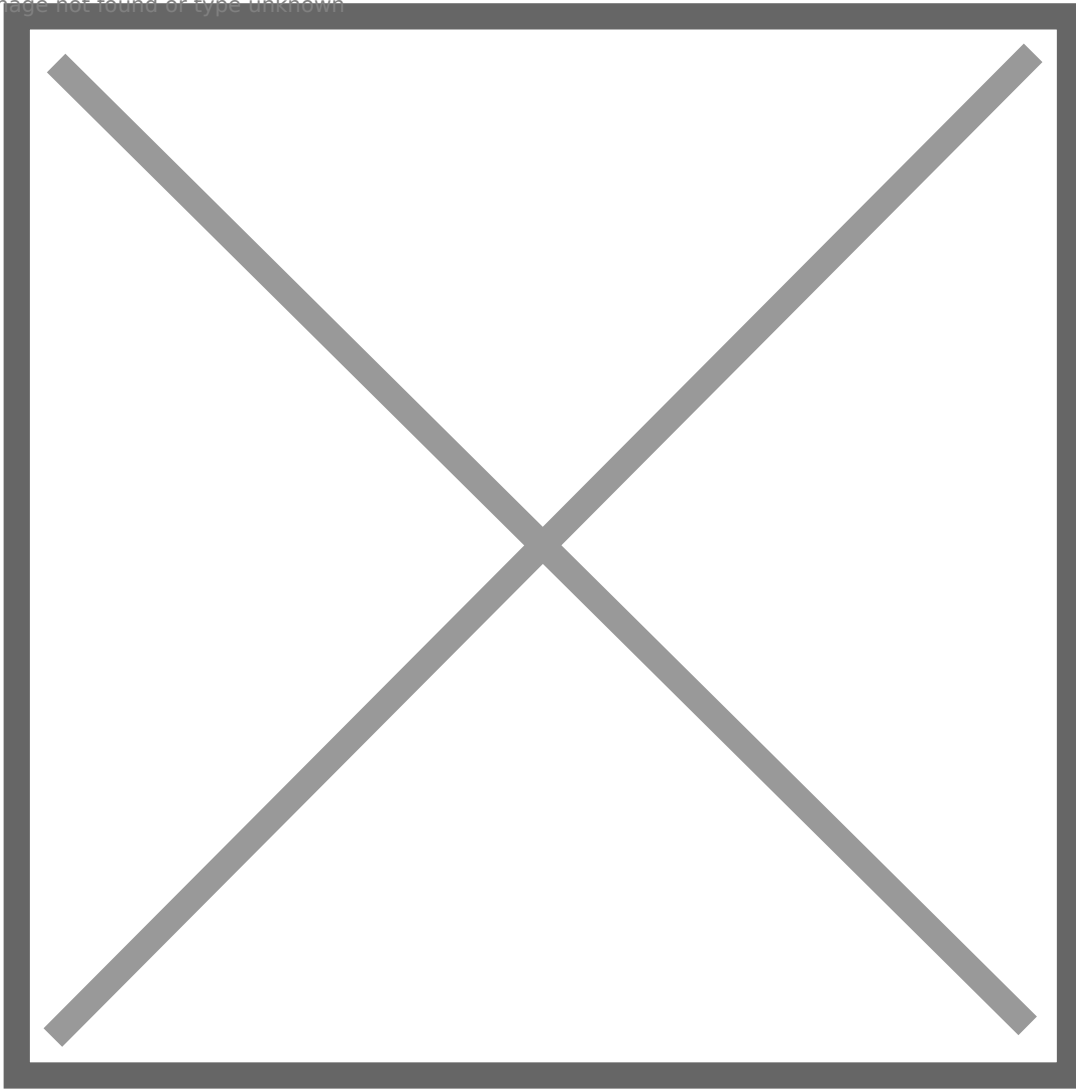
Image not found or type unknown



# Adding Delivery to a Sales Order in the EPoS

1. Delivery can be added to an order by clicking "Add Delivery".

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2. From here you can select the appropriate delivery method. All available delivery methods (Postage Types) will be displayed.

Image not found or type unknown



3. If the customer is not walking away with the product(s), and the product does not need to be ordered in, you can book the delivery.

Image not found or type unknown



4. Clicking "Book Delivery" will open up a scheduler popup. In here you can select the appropriate products that you wish to book the delivery for, as well as the date, lorry and timeslot.

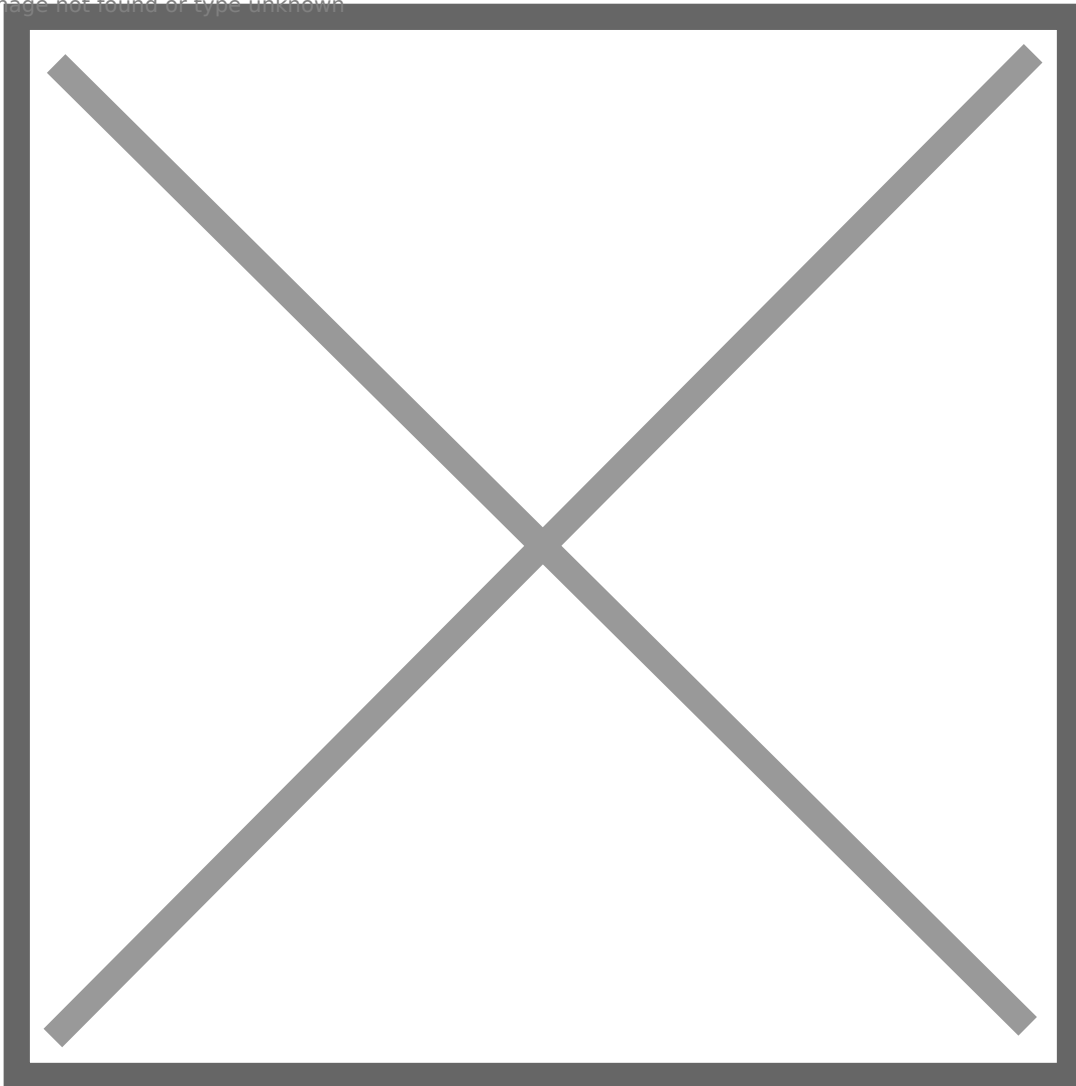
For more detail, there is a separate page for [Scheduling a Sales Order](#)

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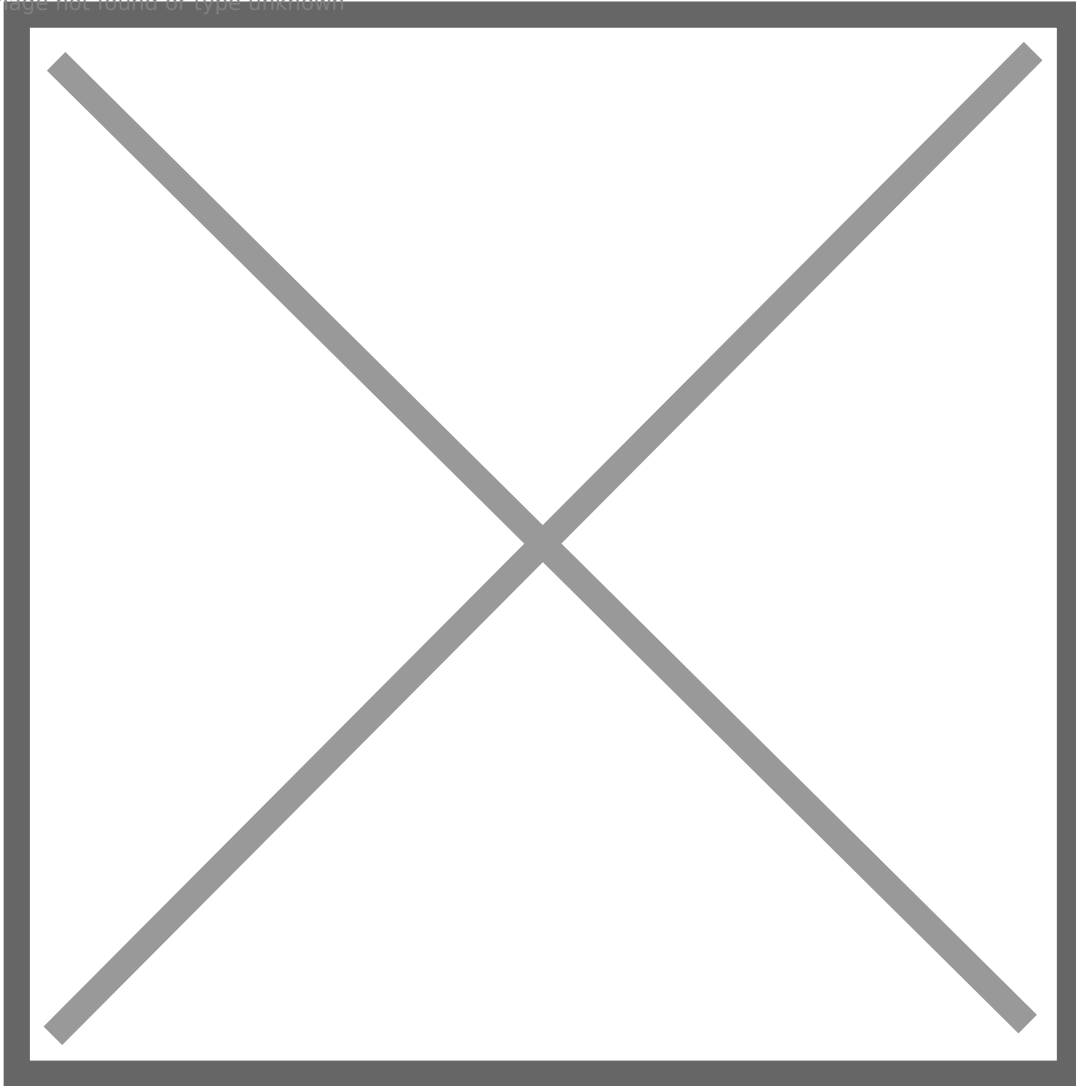
5. You can manually enter a delivery cost.

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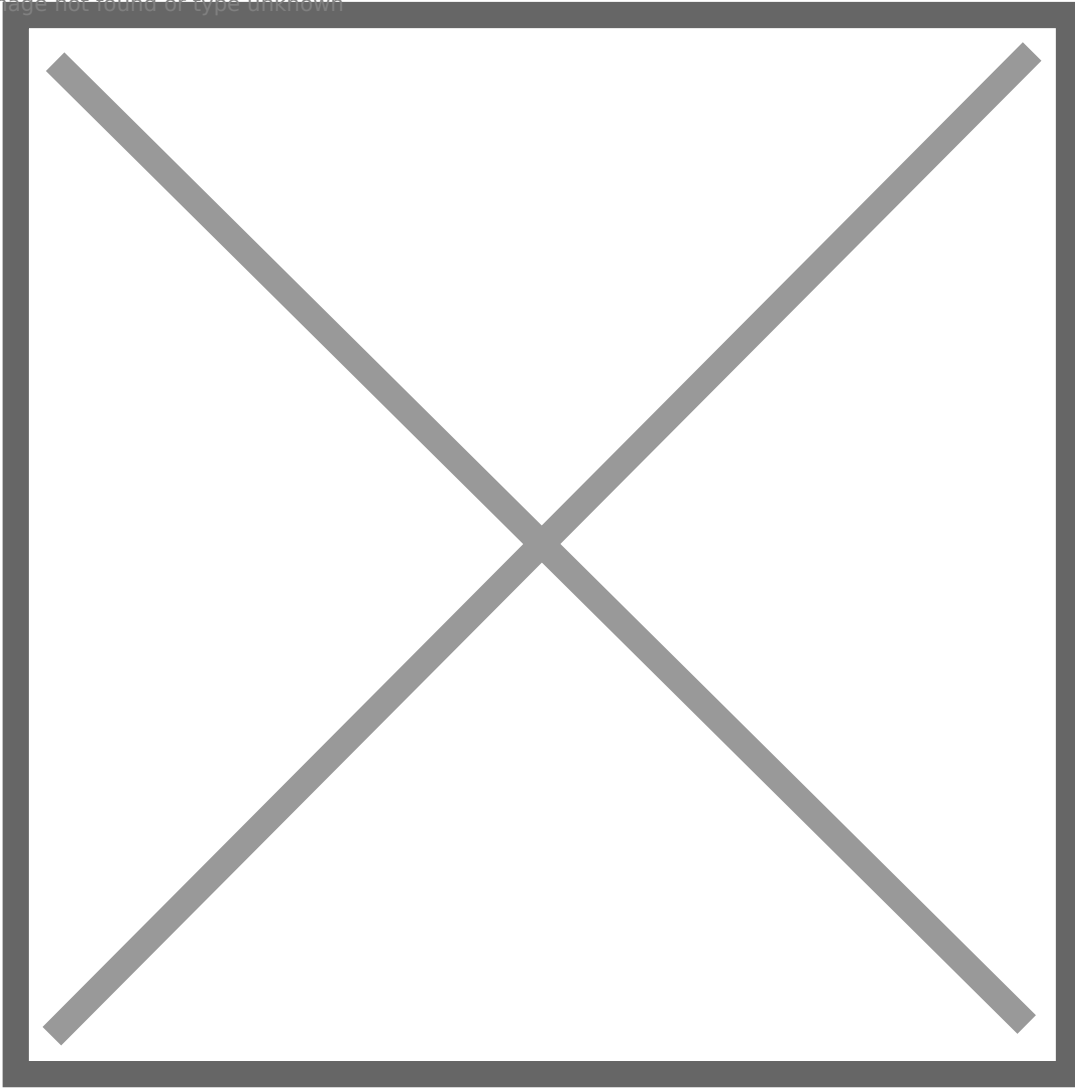
6. However, you can also choose to "Auto-Recalculate" delivery, which will automatically calculate the delivery cost, depending on the delivery address and delivery method (postage type) chosen.

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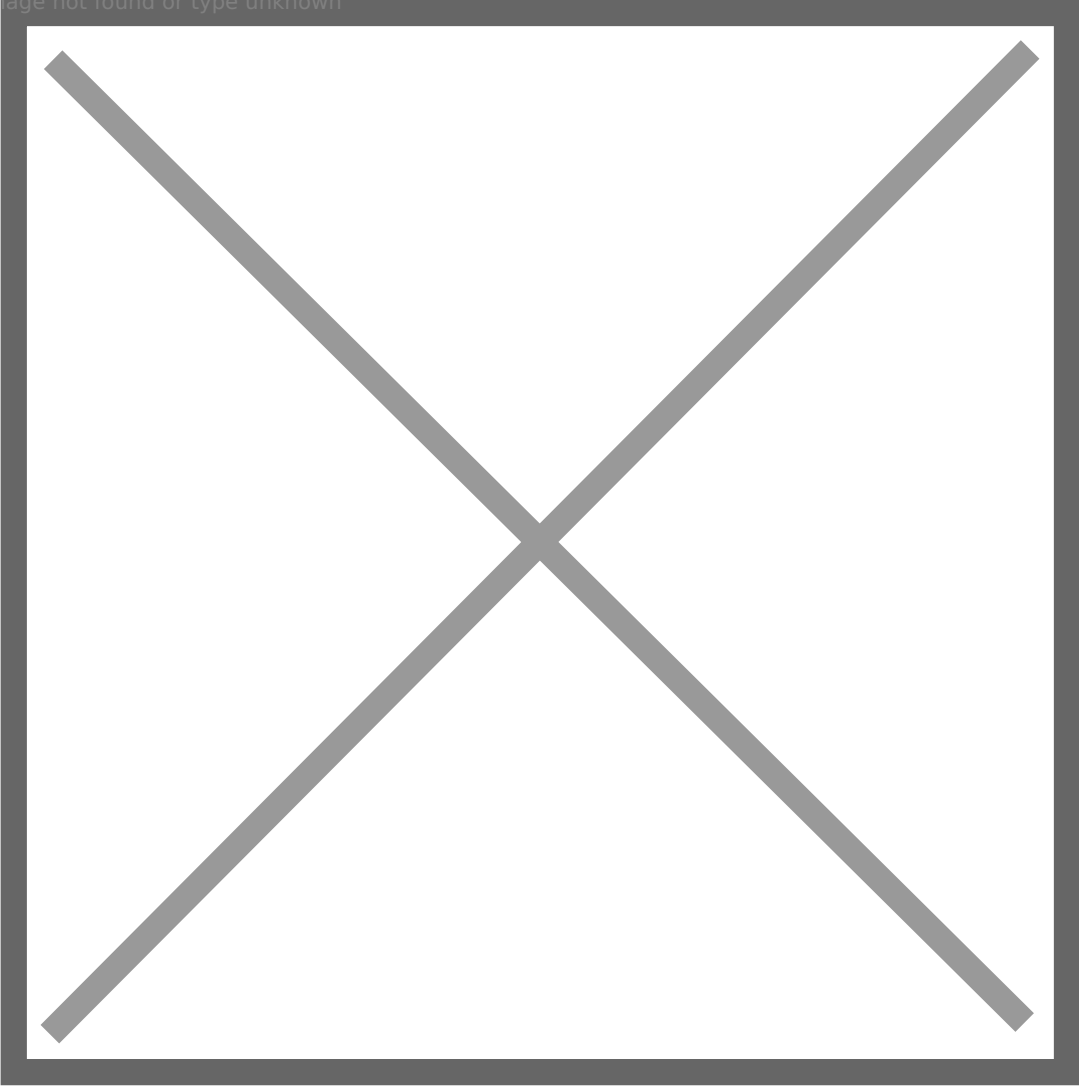
7. You may wish to enter delivery instructions. For example, there may be tricky access which the delivery drivers need to know about.

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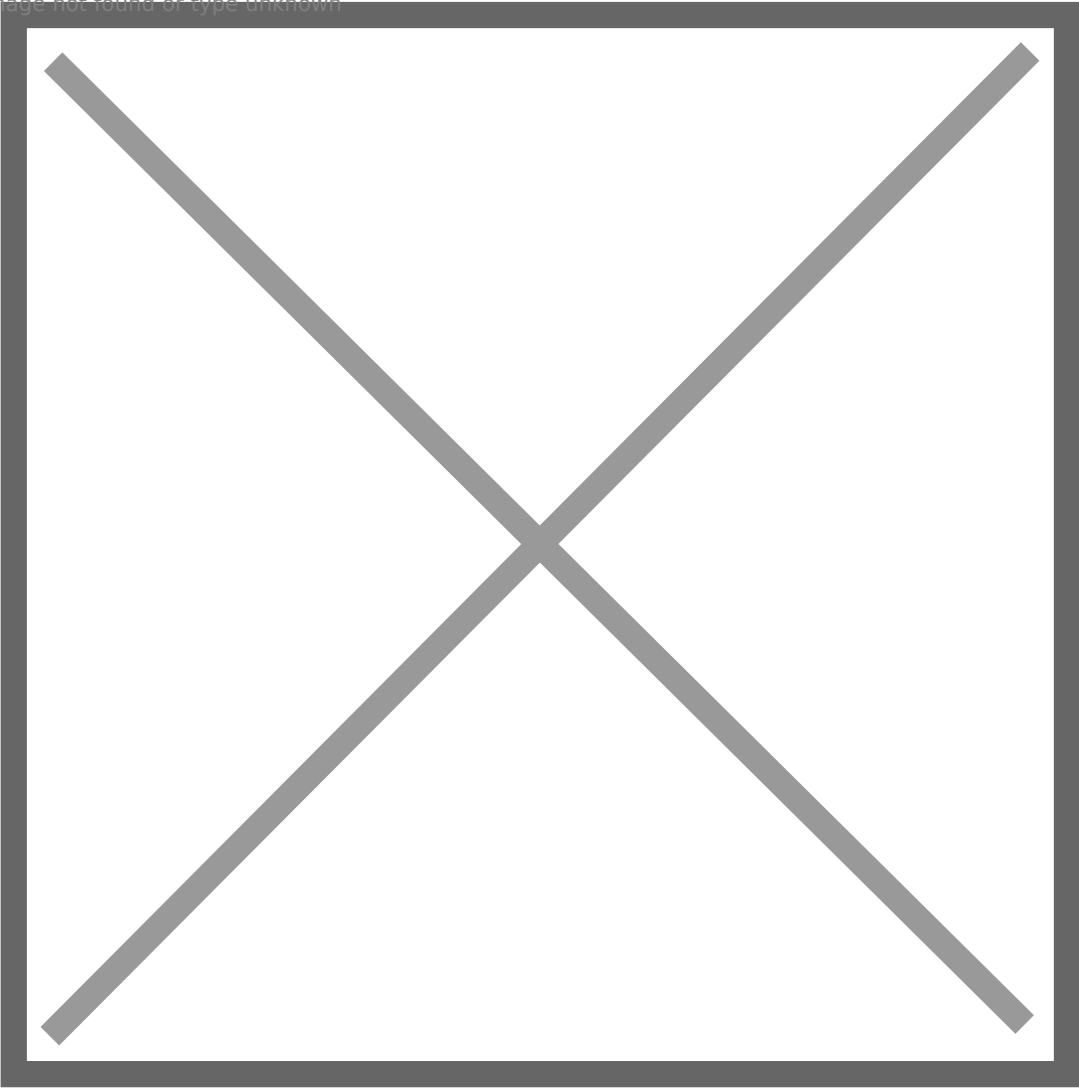
8. Once you're happy that the delivery information has been entered correctly, hit "Update".

Image not found or type unknown



9. Delivery has now been applied to the order.

Image not found or type unknown



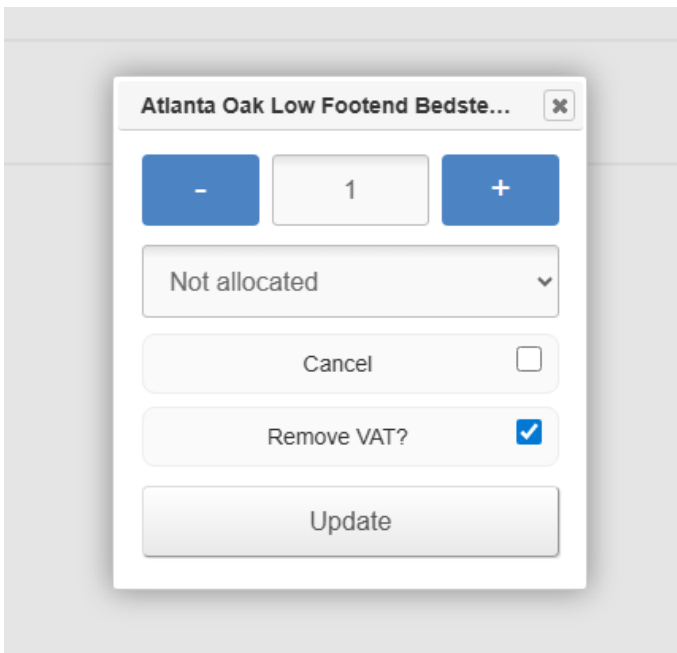
Adding a New Sales Order in the EPoS

# Adding a Payment to a Sales Order in the EPoS

Adding a New Sales Order in the EPoS

# Removing VAT from a Sales Order Line in the POS

Click or tap on the line that you wish to edit, then choose to Remove VAT.



It will be possible to add a [VAT Exemption Form](#) further down the page.

VAT Exemption reasons may be edited in [Site Settings](#)

# Voucher Balance

This screen can be used to do a quick lookup of a [Voucher](#)'s value, on behalf of a [Customer](#).

Enter or scan the barcode of a gift voucher into this box.

## Voucher Balance

This will display a value and an expiry date.

**Balance: £10.00**

Expires: 24/02/2026 12:20

# Performance Report

This screen can be used to review a User's performance.

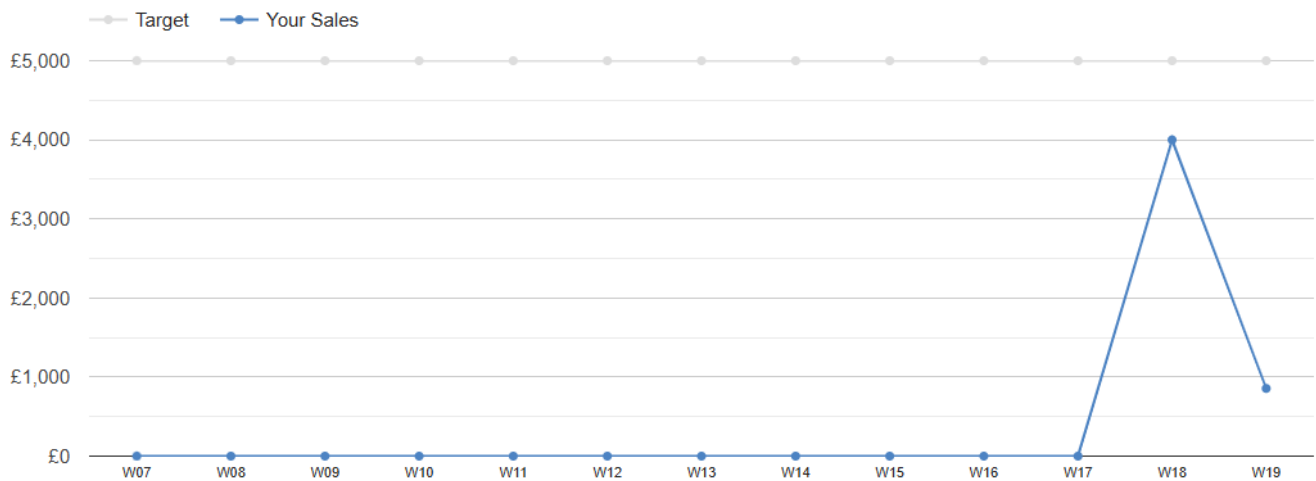
This report is a weekly performance report, benchmarked against the Weekly Sales Target set against each [User](#).

## Performance Report

Your Performance

items sold this week: £856.00	items sold last week: £5,006.09	your weekly target: £5,000.00
----------------------------------	------------------------------------	----------------------------------

Last 12 Weeks



# End of Day

## Tills

A till is defined as a device which is connected to a Receipt Printer; all payments are linked first to Stores, and then to Receipt Printers if one is available.

## X Reads

If a Superuser is logged into the CMS on a device that is connected to a till, it is possible to complete an X read.

This will print a summary of all transactions and payments put through that till since the last End of Day (Z read) was completed.

### End of Day

Till: Star TSP654II ▾

Select an entry

Print X-Read

Run End of Day (Z-Read)

## Z Reads

This is used to cash up a till at the end of the day or at the end of a shift. Because the cashing up process is timestamped, it is possible to cash up multiple times in a single day.

When this is run, it will complete a Z Read for every payment either:

- since 00:01 on that same day, or
- if another Z Read has been completed on that day, it will process for all payments from that Z Read

Data may be retroactively logged by using the drop down at the top of the screen.

Each payment type that was taken on that day will be displayed, along with a box to enter that day's takings. The User should enter the amount as counted, and that will be recorded.

Integrated payment types, such as Elavon Retail Cloud, will not appear on this list, as they are automatically accounted for.

## End of Day

Till:  Z-Read Date:

Please enter the below amounts for each payment type.

Payment Type

card

Amount in till:

cash

Amount in till (including £10.00 float):

cheque

Amount in till:

[Commit End of Day](#)

[Run End of Day](#)

Each till must be cashed up independently; these will be based on linked receipt printers. It will also be possible to cash up 'back office', which covers all payments added from a Store that are not linked to a receipt printer. This will include all payments entered into the CMS.

When payments are added, they are linked to a Store, based on the Store from which the CMS user is currently working. If necessary, the current Store can be amended on the Dashboard, but their default Store is controlled within their User in the CMS.

Submitted data can later be viewed on the [Till Discrepancies](#) report.

## Discrepancies

In the event of a discrepancy, a warning will be shown and the user will be given the option to review the data entered.

**Warning! Discrepancies found**



There is a discrepancy between the amount in till and the expected amount. Please double check the amount before confirming.

Ignore &  
Confirm

Cancel

# Additional Information





Other utilities and minor function within the EPoS

# Complete Sale

This button can affect Stock Levels, and users should be aware of this prior to use

If pressed, the Complete Sale button will:

- mark all items on the order as despatched, regardless of stock availability
- close the order
- print a receipt (if a [Hardware Integration](#) exists)

Order Z5922	
Unallocated	
CARD	06/05/2025 15:02 1.90 GBP ✓ MANUAL iconography
Mr Mike Whitman	
 Yellow banana (bulk pricing) (1853y)	£1.00 £0.95*
 Melon (variants in drop down) Small (36884S)	£1.00 £0.95*
Goods Total	£2.00
 Discount	- £0.10
 Add Delivery	

Complete Sale

## Criteria for Display

The Complete Sale button will only display under certain criteria:

- the item is a 'Collection' order, meaning that delivery has not been configured
- the order is fully paid

It will not show if:

- an order is marked for delivery

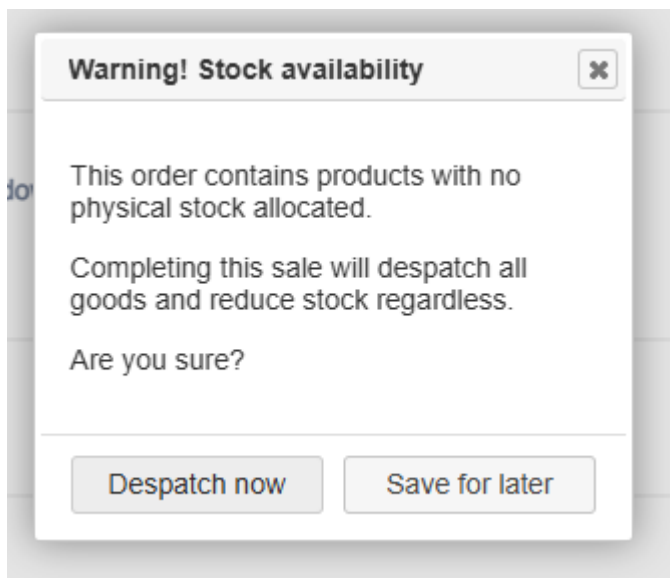
## Warning

If a user attempts to use the Complete Sale button, and not all items have available stock, a warning will be displayed.

If the user presses 'Despatch Now', stock will be automatically created to fulfil the order.

Improper use can cause stock levels to be artificially inflated

'Save for later' will cancel the process and close the pop up without completing the sale.




# Product Detail Page (POS)

This screen shows essential information about the Product, in a similar way to the eCommerce Product Detail Page.


IXO [Browse](#) [Orders](#) [Other](#)

Logged in as iconography from UK Warehouse

## Orla Kiely Linden Small Sofa



At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem rerum facilis est et expedita distinctio. Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe eveniet ut et voluptates repudiandae sint et molestiae non recusandae. Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciendis voluptatibus maiores alias consequatur aut perferendis doloribus asperiores repellat.

 ✓ In Stock from £1001 ADD

## Stock Information

Stock information is shown by tapping/hovering on the box icon on the left hand side

# On Order

This will show a breakdown of all units On Order for that SKU.

This will show the next delivery date of any unit (either allocated or unallocated), based on the confirmed delivery date per Purchase Order line.

## Stock

### Unallocated POS Test

- ✓ UK Warehouse (5 available)
- ⊕ UK Warehouse (11 unallocated, 6 due Mar 25th)
  - Dublin (10 unallocated)

# USRs

This will show a breakdown of all Unique Stock Records with stock, if they are also enabled for the POS.

## Stock

### Other stock available

- ✓ UK Warehouse (2 available)
  - Fabric: A082-Boucle-Earth
  - Scatter Cushions: 3665
- ✓ UK Warehouse (4 available)
  - A081-Boucle-Jute Fabric
  - Scatter Cushions 3665 42
  - Fabric