

Welcome to Udio's training guide for setting up point of sale (POS).

Udio offers an integrated POS system, with a full inventory and stocktake. In this manual, we'll walk you through how to set up POS, providing step-by-step instructions as well as visual aids.

If you have any questions about the guide or would like more information about a certain step, please send us an email at hello@udiosystems.com.

To browse our other manuals, please visit our training page.

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1. Product Catalogue

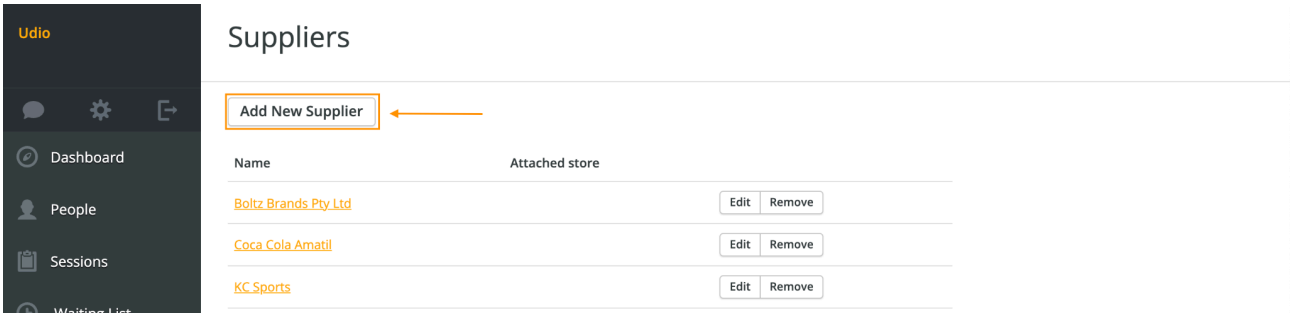
The following categories are located in the *Settings* tab under *Product Catalogue.*

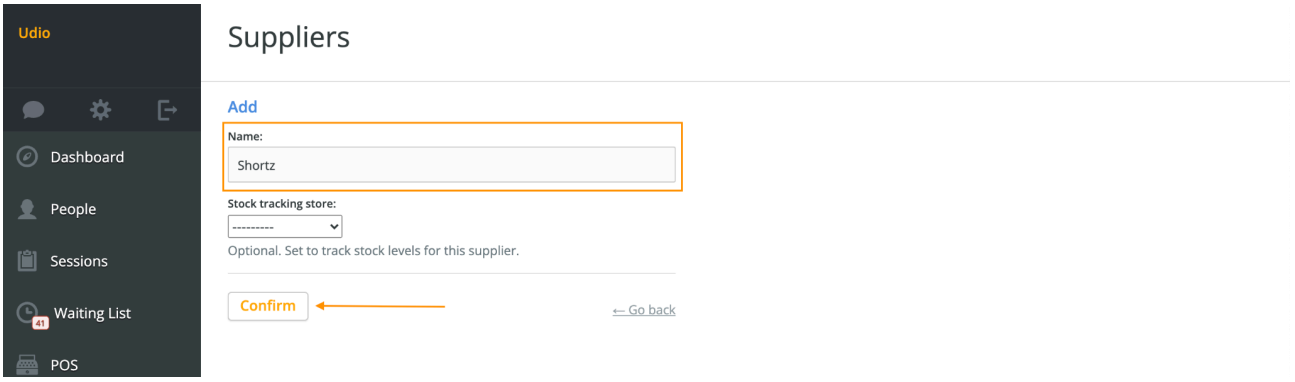
1.1 Suppliers

For businesses with multiple suppliers, this setting will allow you to track their products and take control of their billing.

1.1.1 Add a new supplier

- Click *'All suppliers'* followed by *'Add New Supplier'*
- Enter the supplier's name and leave *'Stock tracking store'* blank
- Click *'Confirm'* to save changes
- Repeat this process for all your suppliers



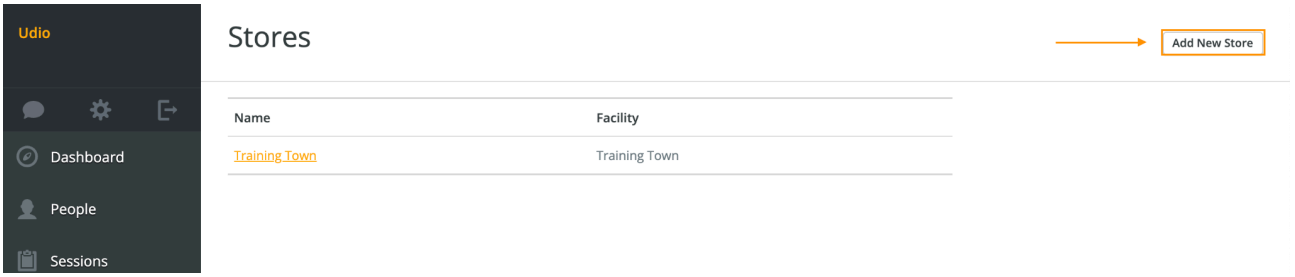


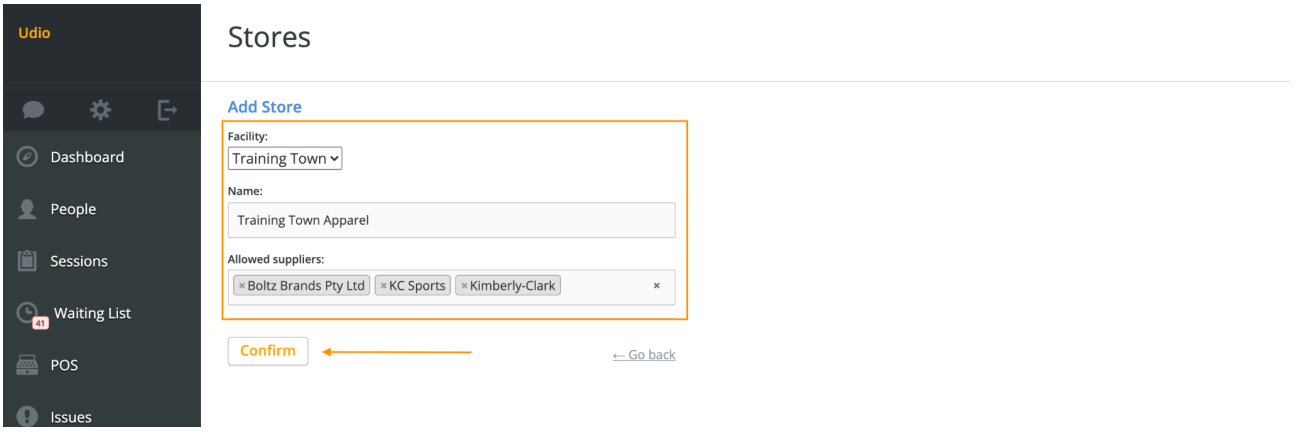
1.2 Stores

If your business has one or more stores, this function will allow you to exercise control over your stock and hold staff responsible for the products in their store only. For example, a gym might have a cafe or health food store, plus a store that sells gym wear and accessories. You can manage each store separately.

1.2.1 Add a new store

- Click *'All stores'* followed by *'Add New Store'*
- Select the *'Facility'* and enter a name
- Click the *'Allowed suppliers'* dropdown and select the relevant suppliers
- Click *'Confirm'* to save changes
- Repeat for each store (if you have more than one)



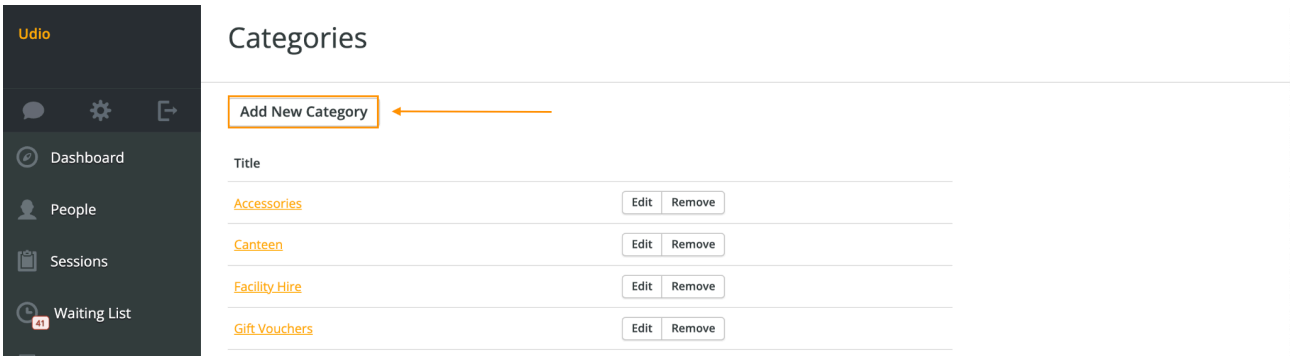


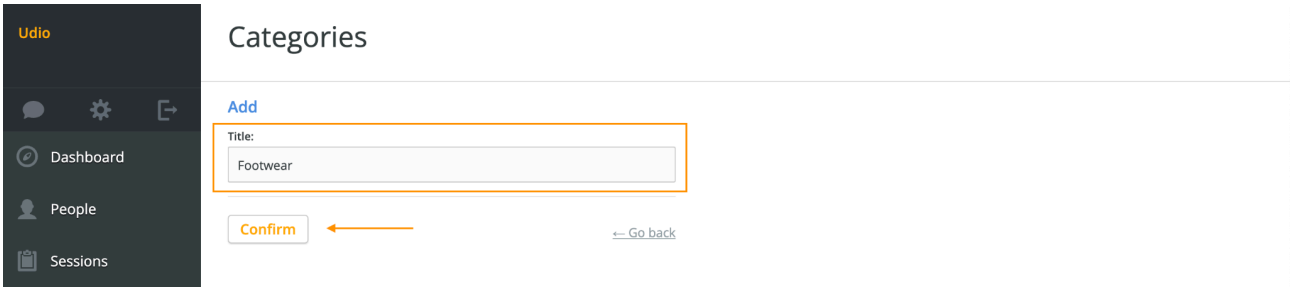
1.3 Categories

The *'All categories'* setting allows you to divide your products into different categories to more effectively manage each product. For example, 'Food' may be a category and within the category of food, you could include products like sports drinks and ice creams. Each product will have its own SKU (barcode).

1.3.1 Add a new category

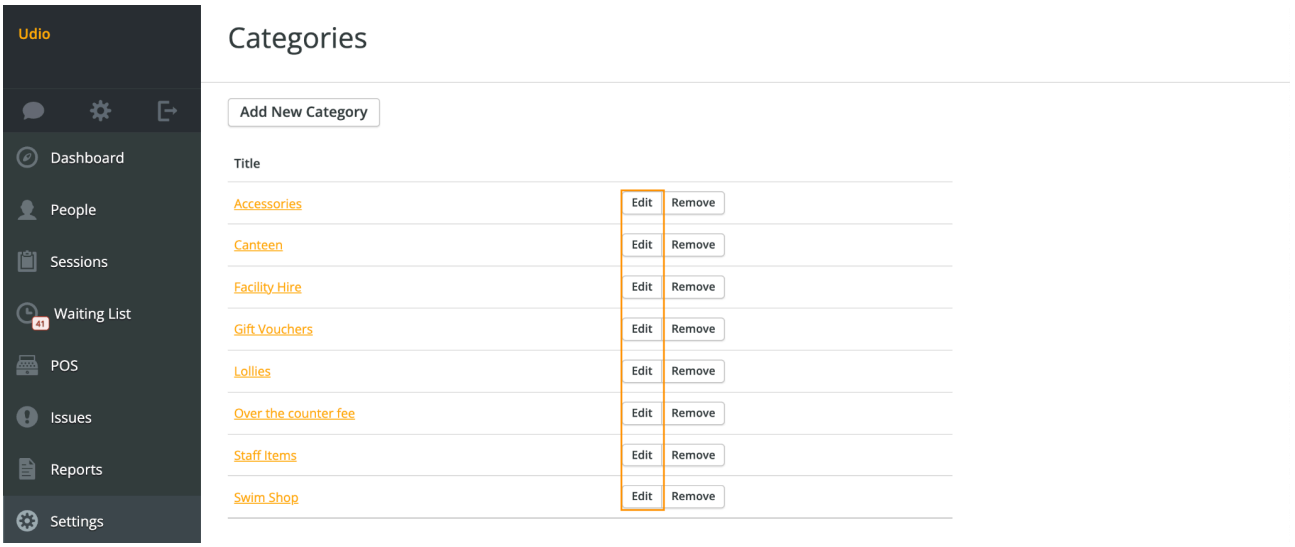
- Click *'All categories'* and select *'Add New Category'*
- Add a name and click *'Confirm'* to save the changes
- Repeat for each of your categories





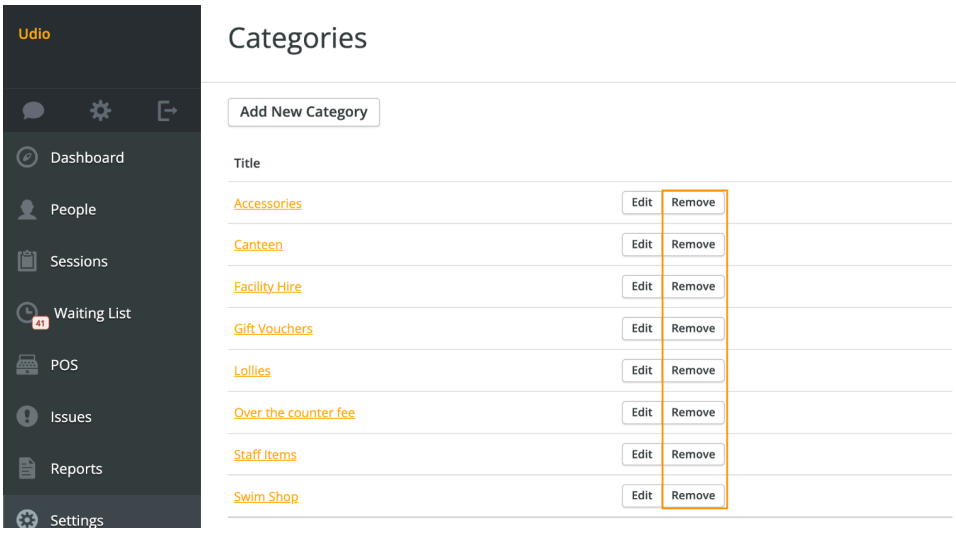
1.3.2 Edit a category

- Click on *'Edit'* next to the category to edit its title
- Click *'Confirm'* to save the changes



1.3.3 Remove a category

- Click *'Remove'* and then confirm the deletion

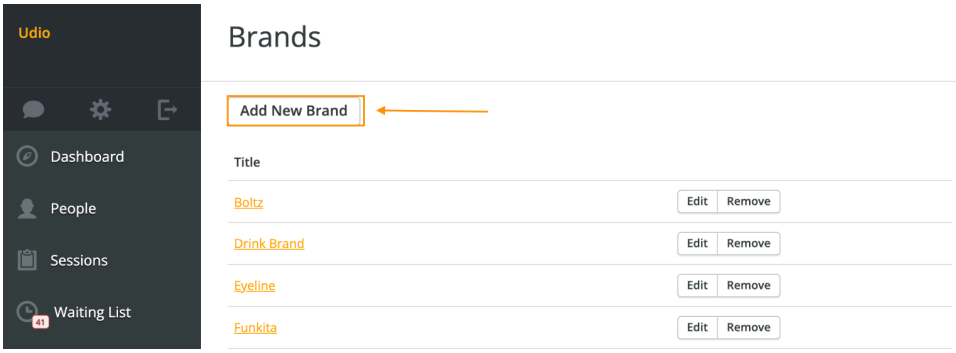


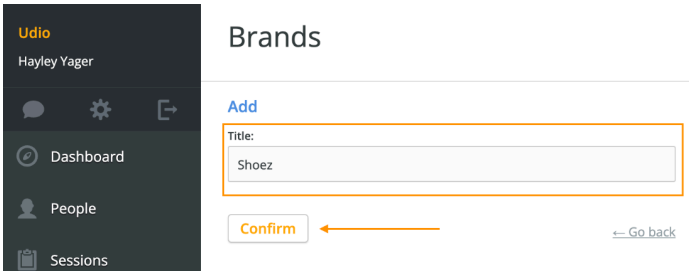
1.4 Brands

A brand is another way to categorise a product.

1.4.1 Add a new brand

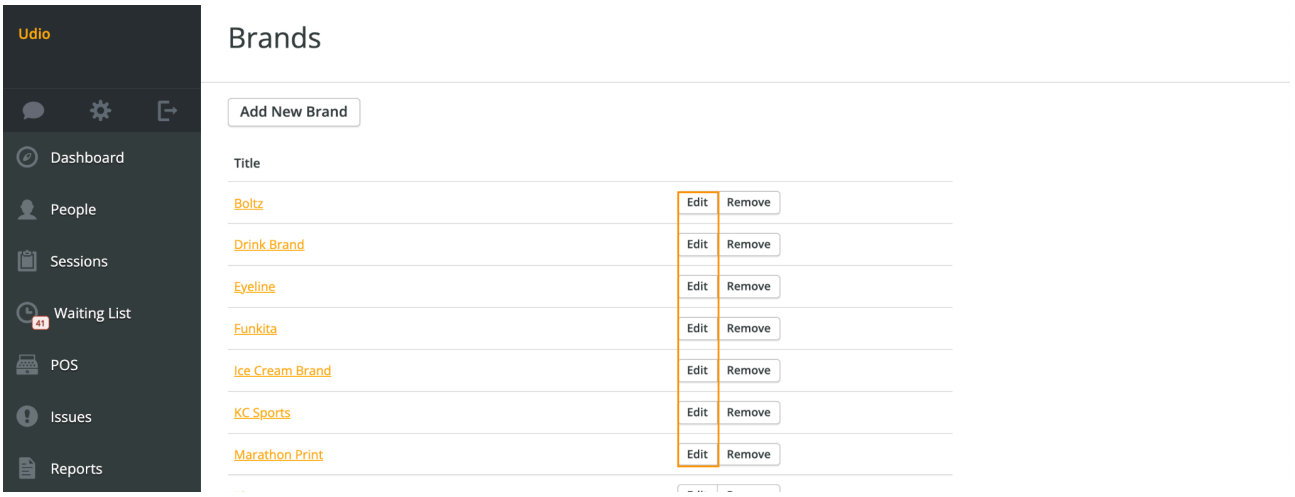
- Click *'All brands'* and select *'Add New Brand'*
- Add in the title and click *'Confirm'*





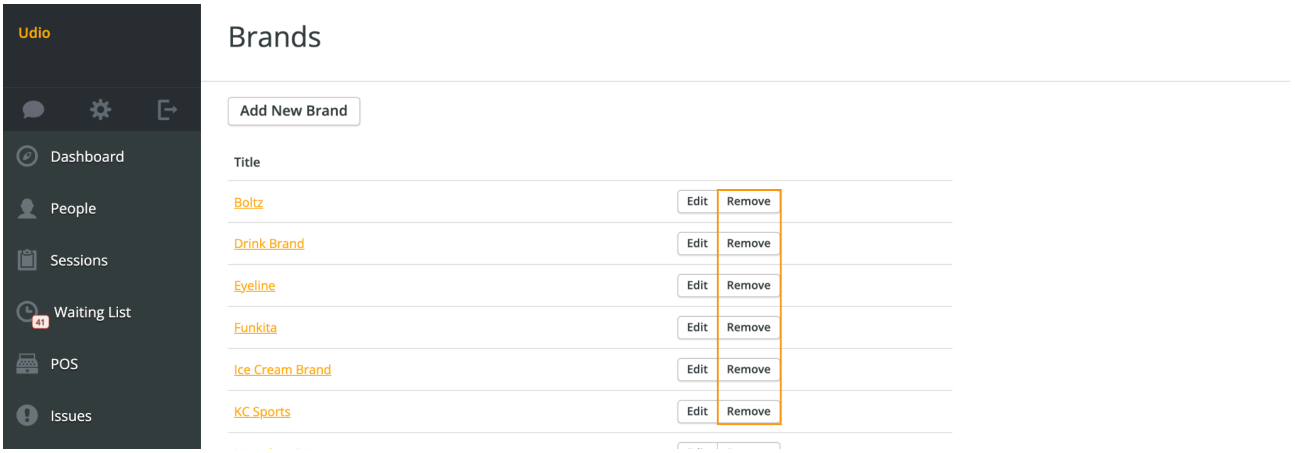
1.4.2 Edit a brand

- Click on 'Edit' next to the brand to edit its title
- Click *'Confirm'* to save the changes



1.4.3 Remove a brand

- Click *'Remove'* next to the brand you wish to remove

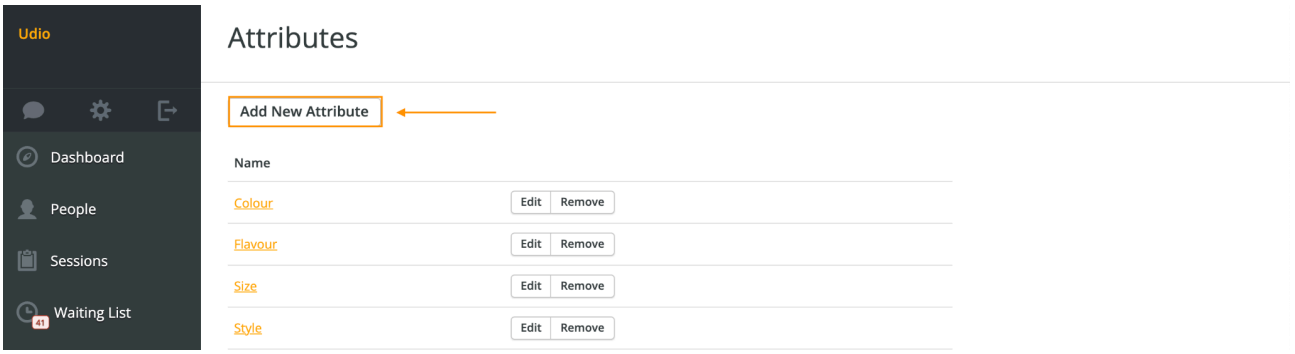


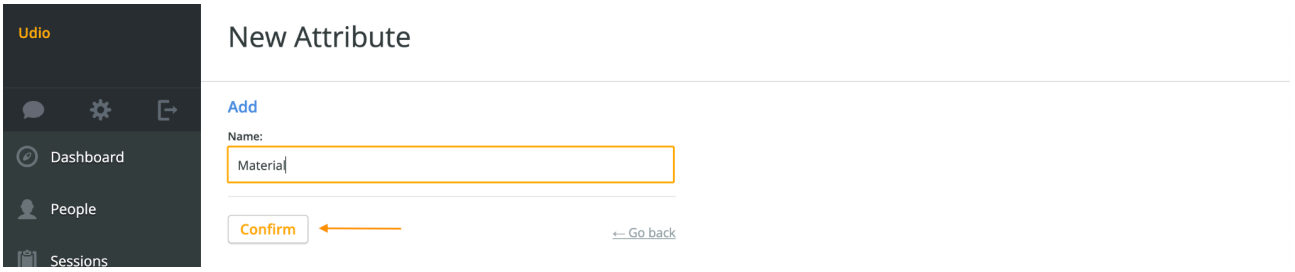
1.5 Product attributes

Each SKU also has a number of attributes to help you identify it. For example, clothing will have different SKU attributes such as gender, size, colour and type. By entering the different attributes of each SKU, you will have a better indication of which products are performing well in your business, assisting you with stock control.

1.5.1 Add a new attribute

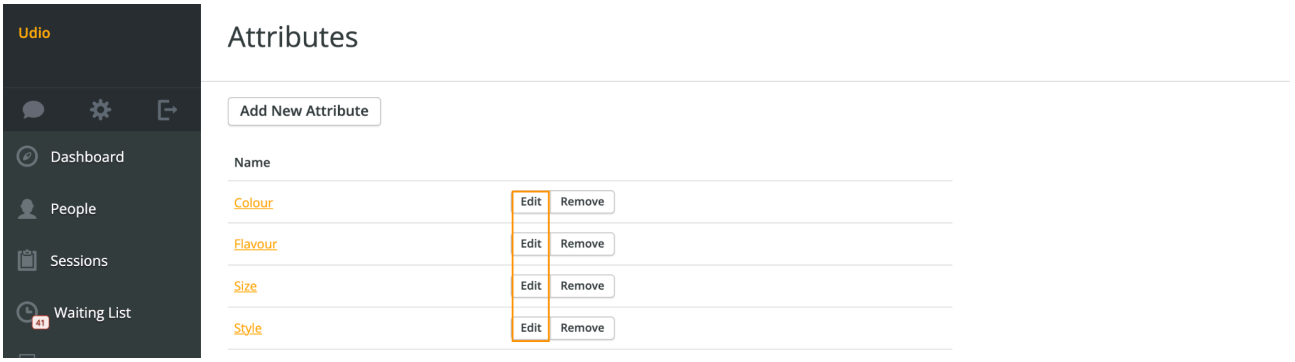
- Click *'All Product Attributes'* followed by *'Add New Attribute'*
- Type in the name and click *'Confirm'*





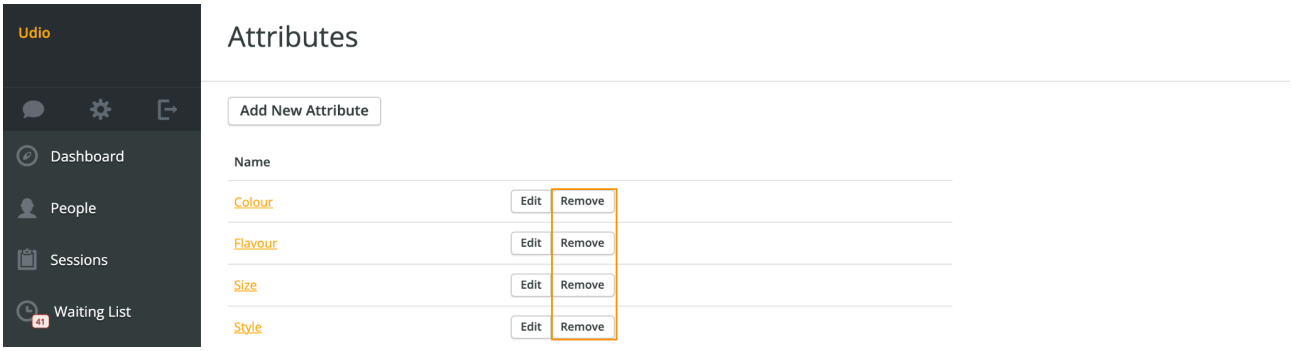
1.5.2 Edit an attribute

- Click the *'Edit'* button to change the name
- Click *'Confirm'* to save the changes



1.5.3 Remove an attribute

- Click 'Remove' and then confirm the deletion

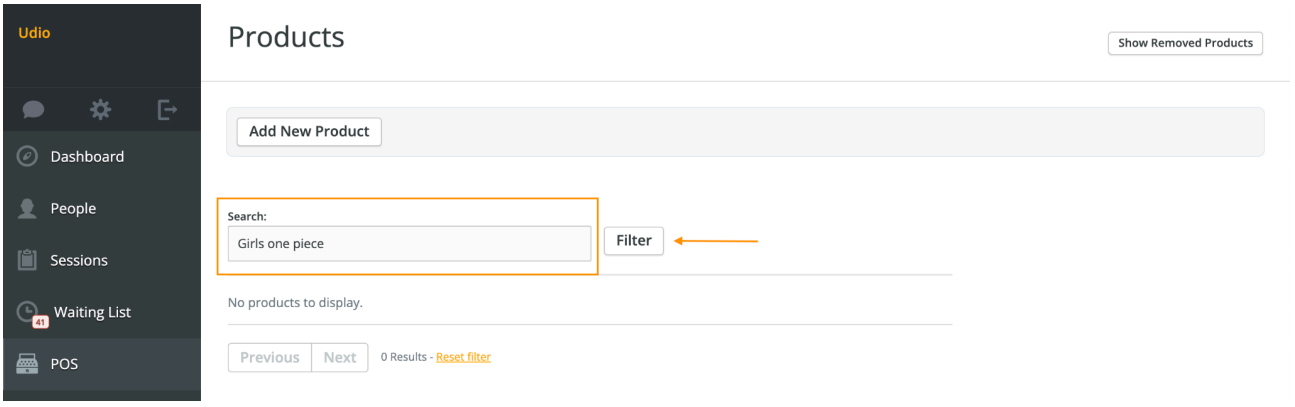


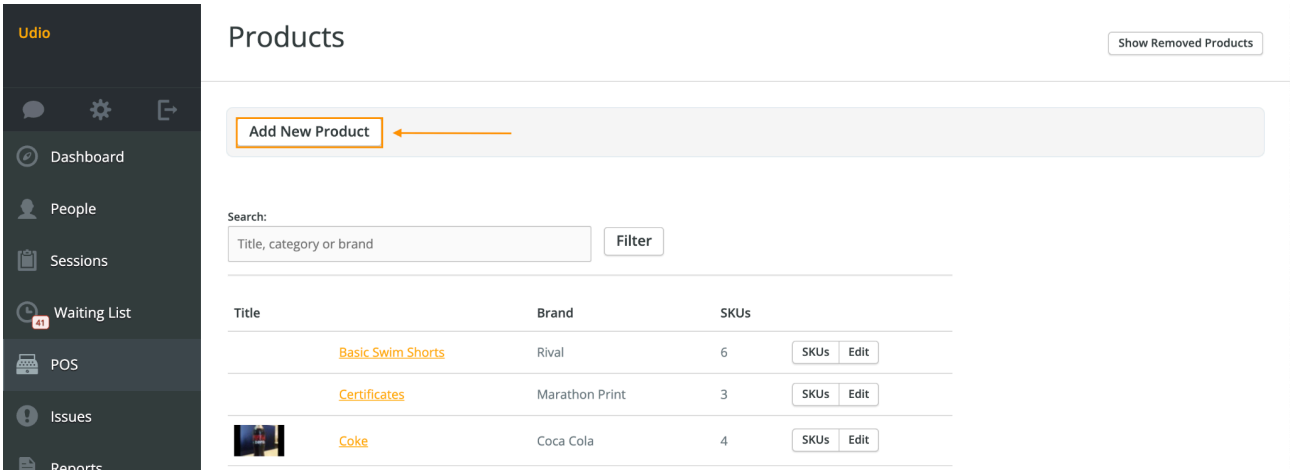
1.6 Products

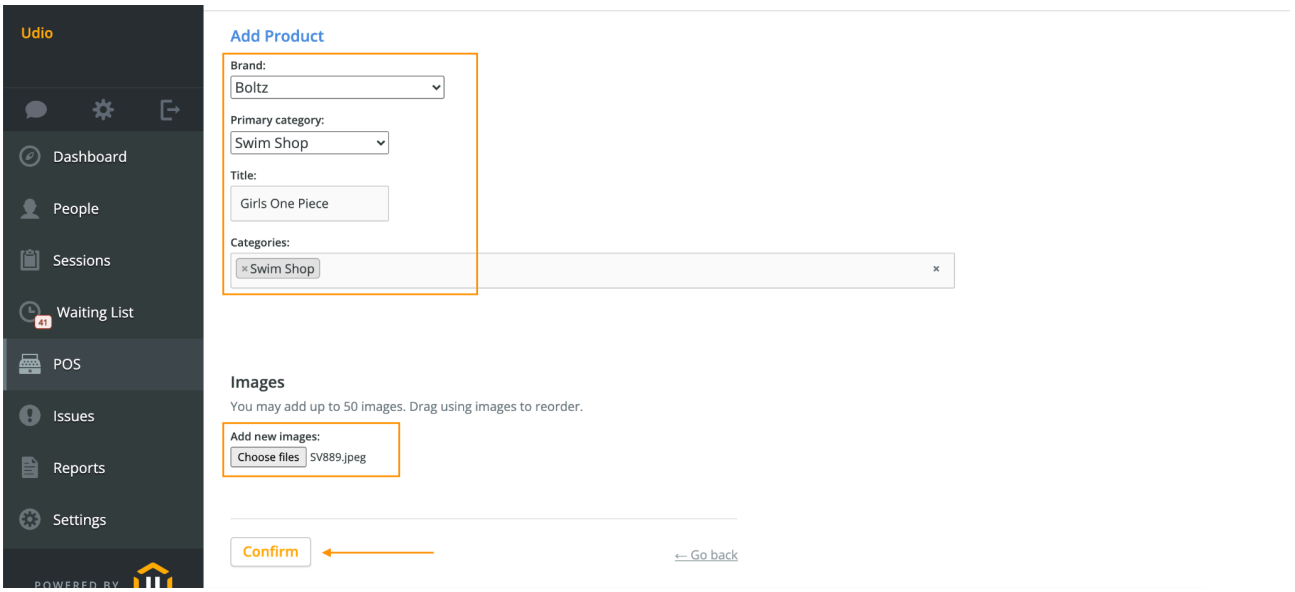
This setting gives you the flexibility to add each product and all the relevant information attached to it including the SKU, and wholesale/retail prices. If you're not sure whether you've had this item previously or you know it's an indent order, it's best to search the SKU via *'All SKUs'*. Remember to upload your new images.

1.6.1 Add a new product

- Click *'All products'* and first do a quick search in the search bar to see if the product is already in there (e.g. Girls One Piece or Boys Cap)
- Select *'Add New Product'*
- Select the brand, primary category, title of the product and categories
- Upload images (this will be displayed next to the item for ease of finding)
- Click *'Confirm'* to save the changes
- You will then be taken to another screen prompting you to enter the SKU for this product

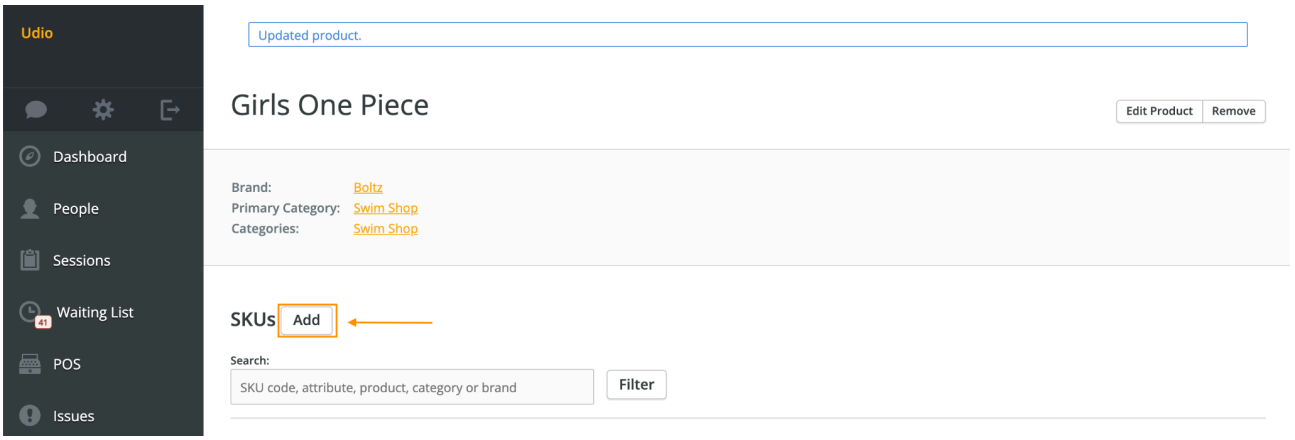


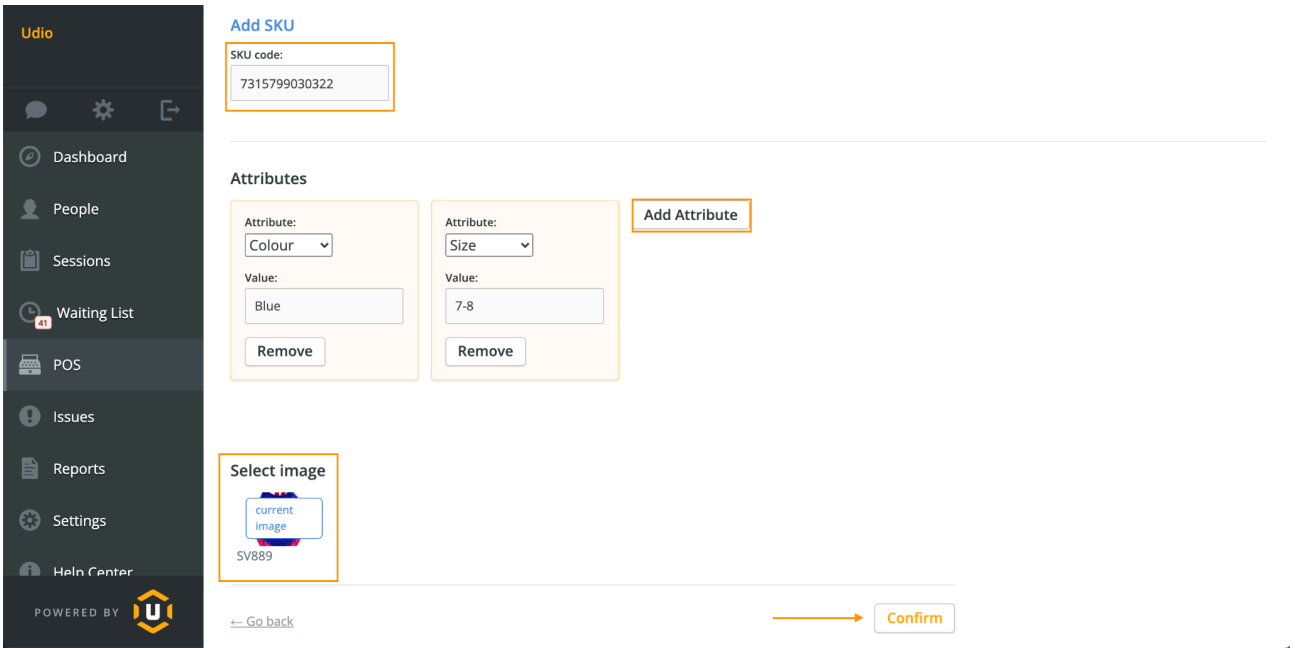




1.6.2 Add an SKU code

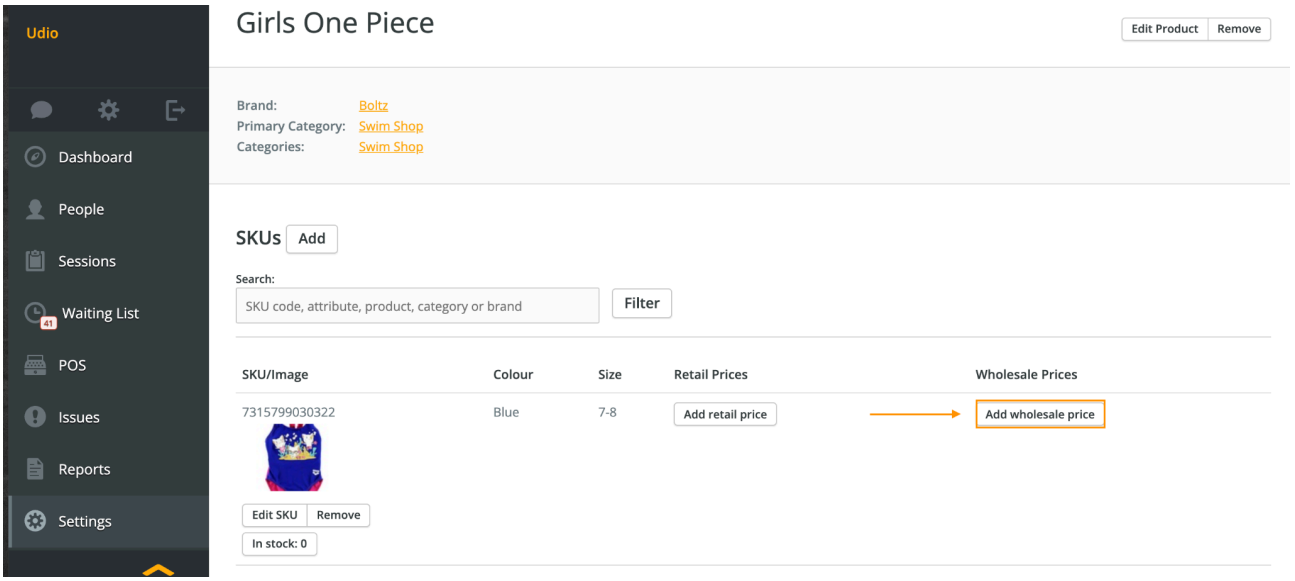
- Following on from the above, click on *'Add'* next to SKUs
- Enter or scan the SKU code
- Enter the attributes (you can add multiple by clicking *'Add Attribute'*)
- Select an image by clicking on the image itself
- Click *'Confirm'* to save the changes
- You will now need to add the price for the product (see *'Add wholesale price'* below)

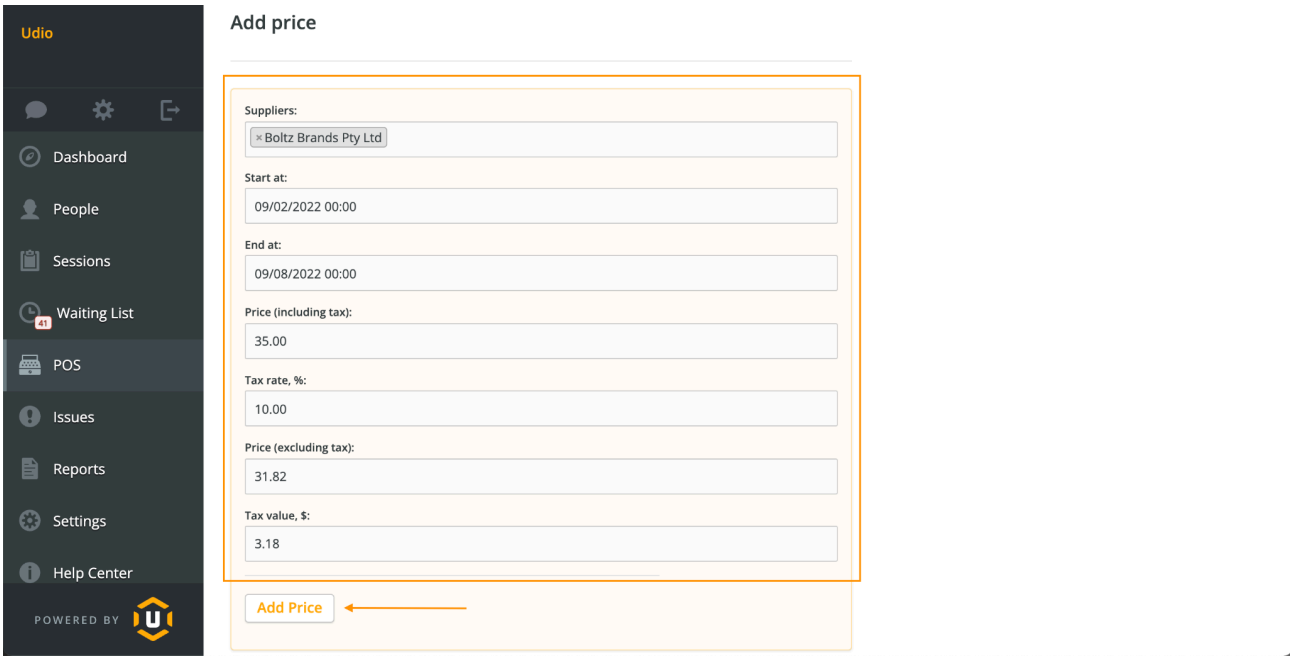


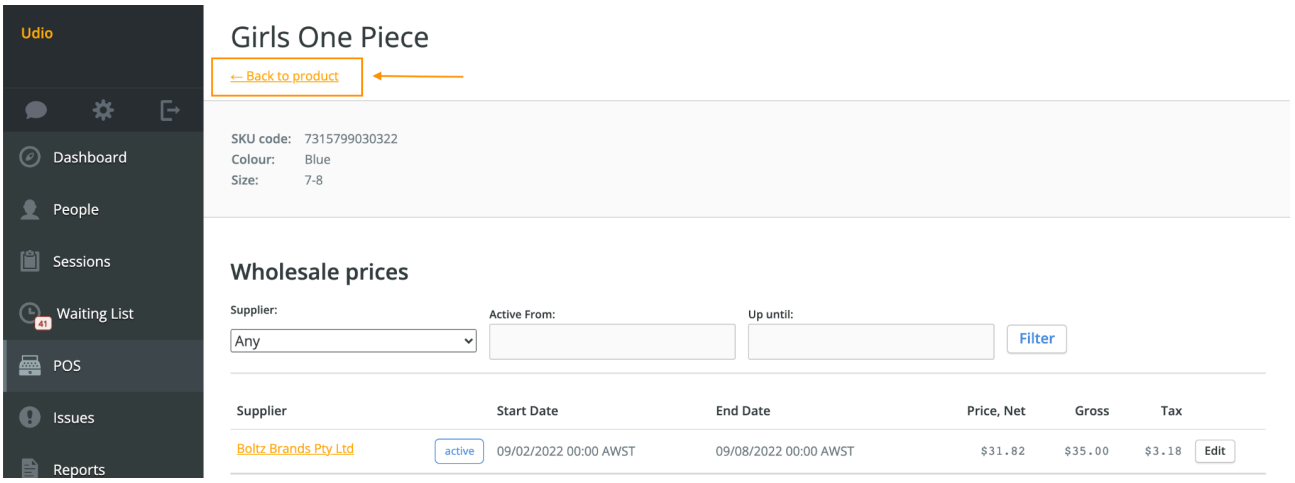


1.6.3 Add a wholesale price

- Click *'Add wholesale price'*
- Under *'Add price'*, select a supplier, start and end date, price including tax and the tax rate
- Click *'Add price'*
- Click on *'Back to product'* (at the top of the page)

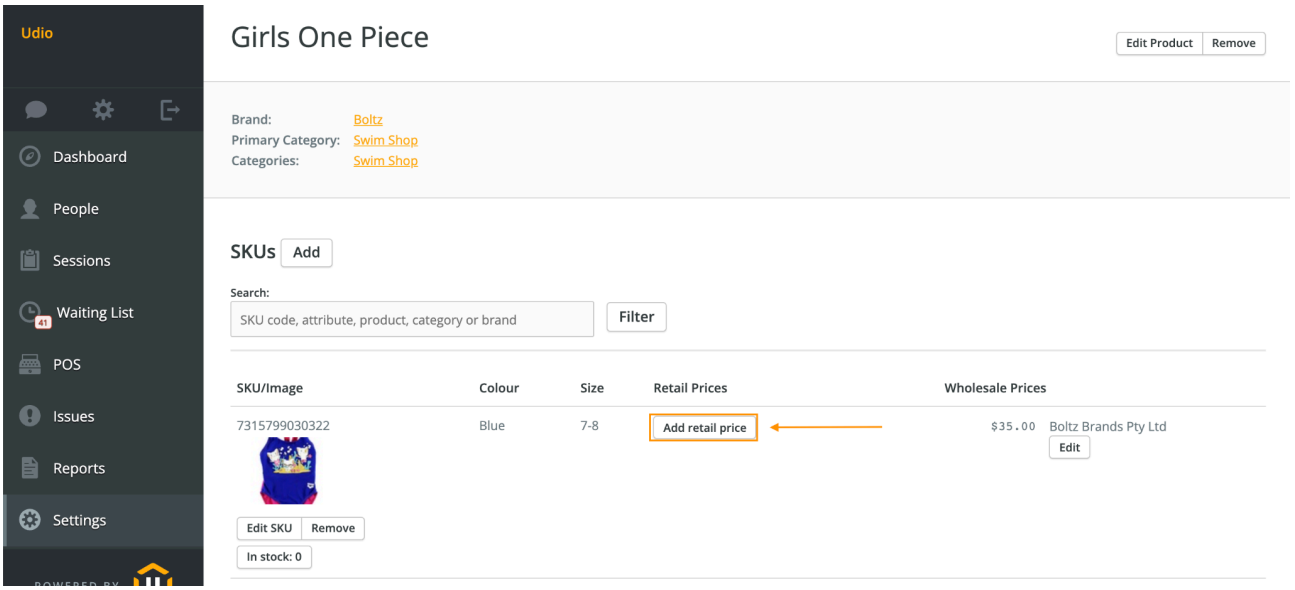


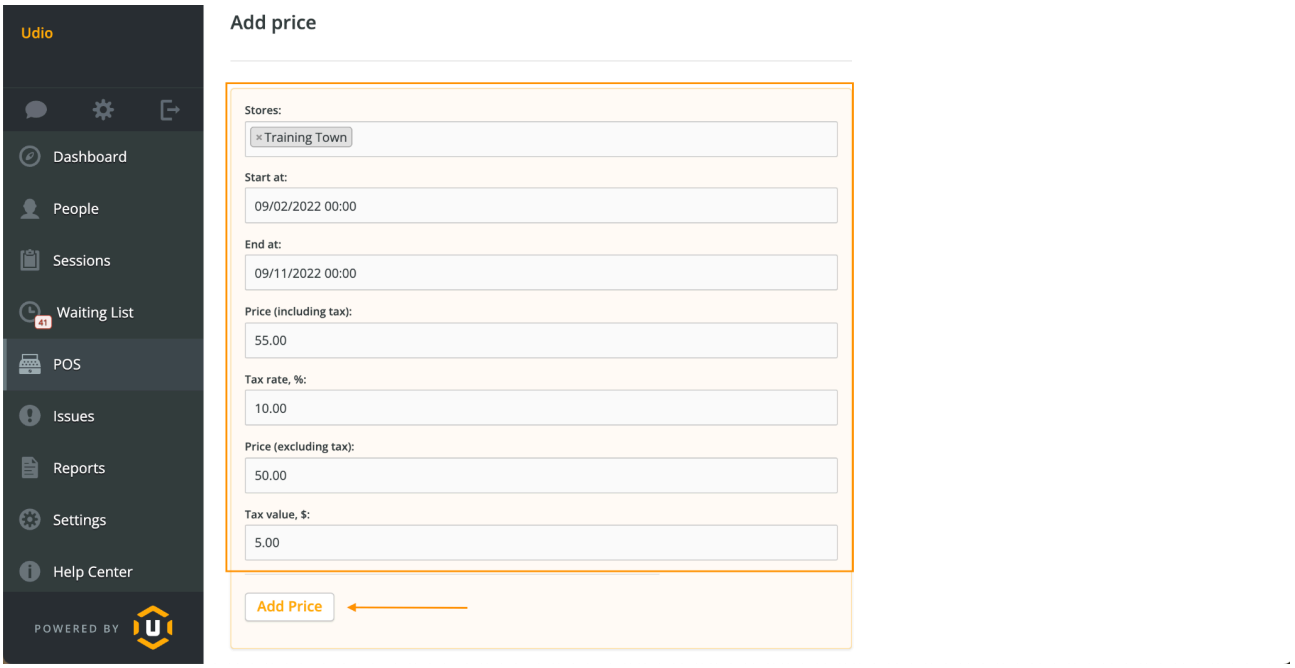


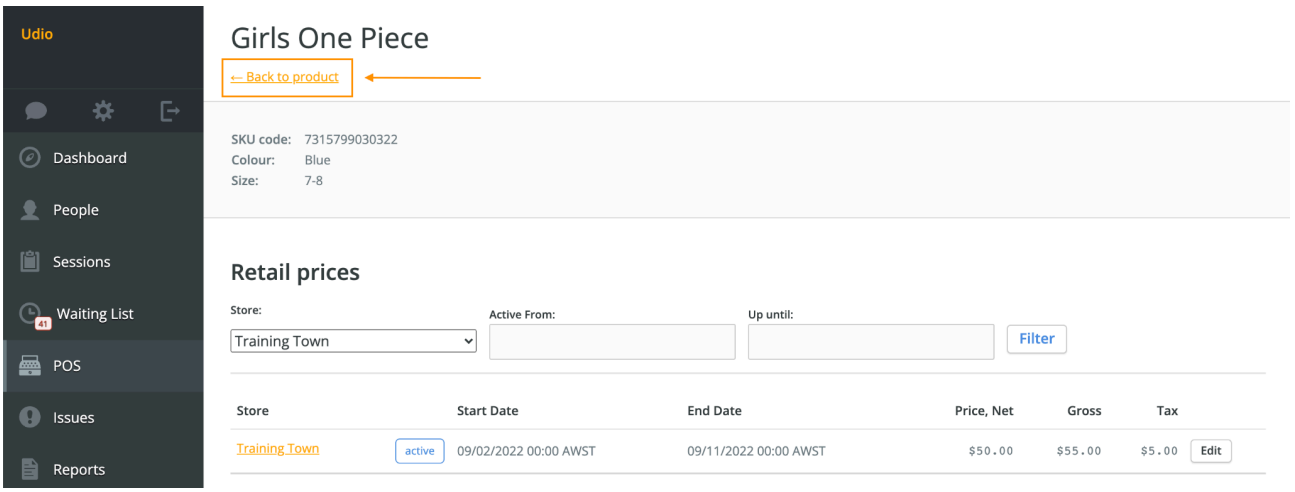


1.6.4 Add a retail price

- Click on *'Add retail price'*
- Under *'Add price'*, select the store(s) where this price will be effective, a start and end date, price including tax and tax rate
- Click *'Add Price'*
- Click *'Back to product'* (at the top of the page)
- When ready, you'll need to set the initial stock count (see *'Add the initial stock count'* below)

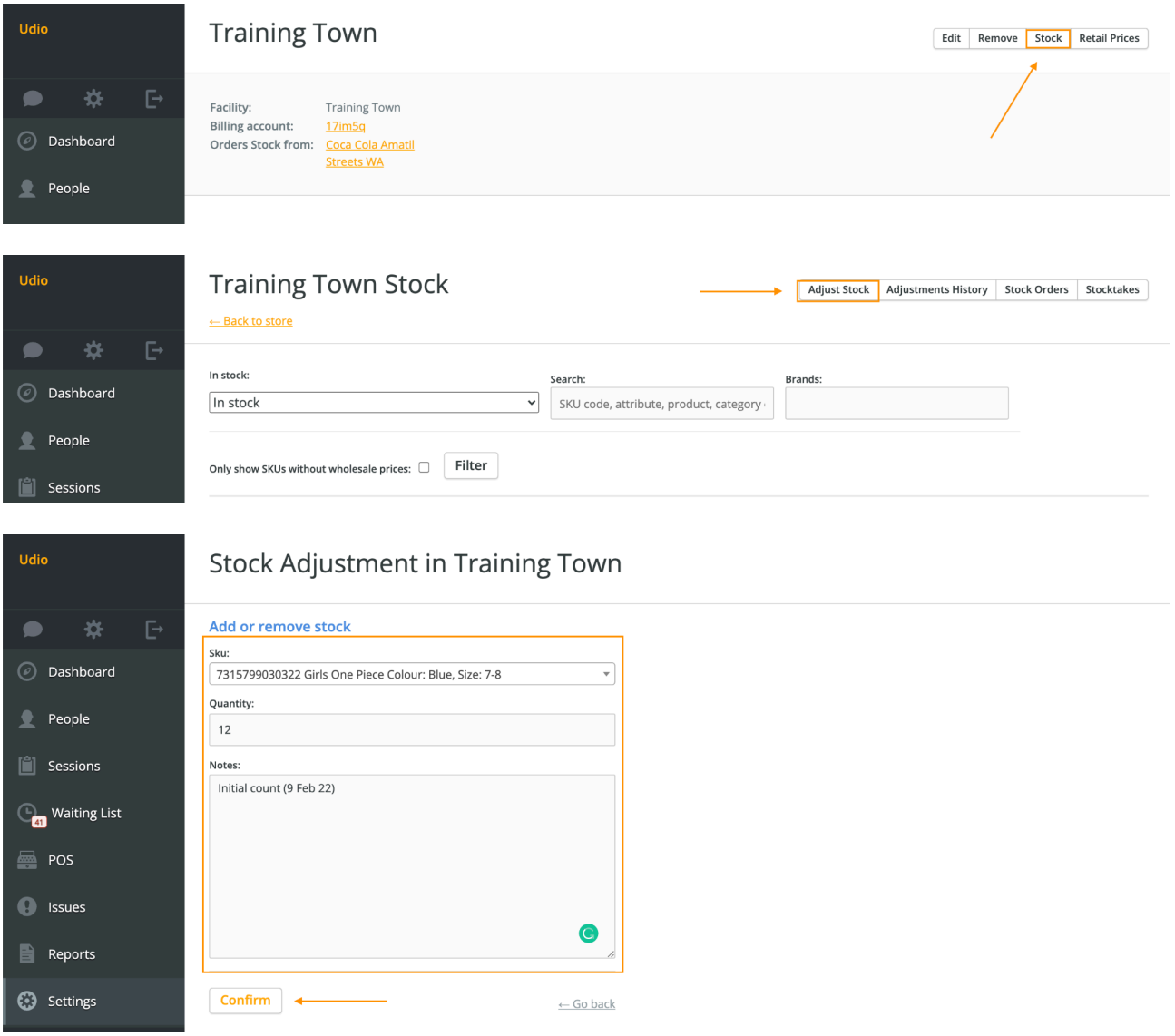

Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Girls One Piece
Edit Product
Remove
Brand: Boltz
Primary Category: Swim Shop
Categories: Swim Shop
SKUs
Add
Search:
SKU code, attribute, product, category or brand
Filter
SKU/Image
Colour
Size
Retail Prices
Wholesale Prices
7315799030322
Blue
7-8
Add retail price
$35.00
Boltz Brands Pty Ltd
Edit
Edit SKU
Remove
In stock: 0


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Settings
Help Center
POWERED BY
Add price
Stores:
Training Town
Start at:
09/02/2022 00:00
End at:
09/11/2022 00:00
Price (including tax):
55.00
Tax rate, %:
10.00
Price (excluding tax):
50.00
Tax value, $:
5.00
Add Price


Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Reports
Girls One Piece
← Back to product
SKU code: 7315799030322
Colour: Blue
Size: 7-8
Retail prices
Store:
Training Town
Active From:
Up until:
Filter
Store
Start Date
End Date
Price, Net
Gross
Tax
Training Town
active
09/02/2022 00:00 AWST
09/11/2022 00:00 AWST
$50.00
$55.00
$5.00
Edit

1.6.5 Add the initial stock count

- Back to *Product Catalogue*, *click 'All stores'* and select the relevant store
- Click on *'Stock'* and then *'Adjust stock'*
- Select or search for the SKU
- Type in your initial stock quantity
- Add a note (e.g. initial count) and click *'Confirm'*



1.6.6 Head office transfer

This is where there is a one-off item or items that don't touch stock numbers. You can set up a supplier called *head office transfer* which will allow you to transfer items without entering or exiting your physical stock.

1.6.6.1 Stock arrives at head office (or direct from the supplier)

- Physically count the stock and allocate it to the appropriate store
- Create each item in Udio remembering to upload images
- Add the SKU and attributes, select the image and click *'Confirm'*
- Scan or find the item and add the wholesale price (for this you need to add Head Office, Head Office Transfer and Supplier) and Retail price

You then create an order:

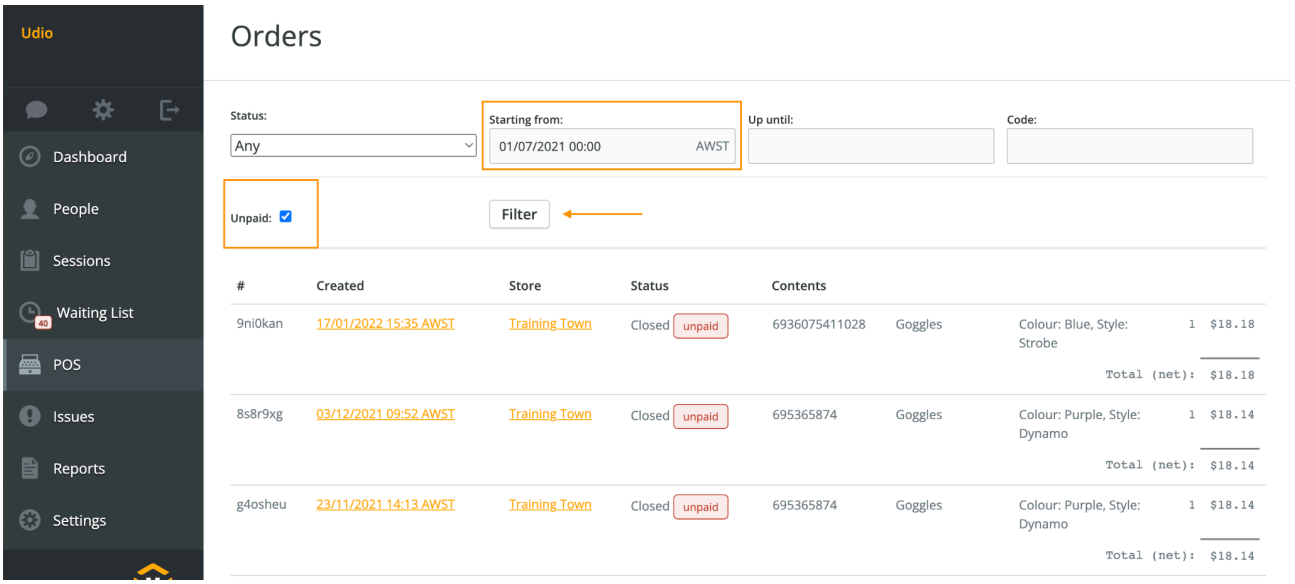
- Go to *'All stores'* and select the store
- Click *'Stock'* in the top right-hand corner followed by *'Stock Orders'*
- Click *'Add new order'* and select *'Head Office Transfer'* as the source
- Hit *'Create Order'*
- Scan or search the item you want to transfer
- Click *'Update Order'* then 'Send for Processing' (twice)
- Click *'Dispatch'* (twice)
- Mark items as received, accept and close

2. Reverse unpaid invoices

When a staff member starts a POS transaction but doesn't take payment and leaves the screen, this will create an unpaid invoice. This will reduce your stock count meaning it will be incorrect during your stocktake.

2.1 How to identify unpaid invoices

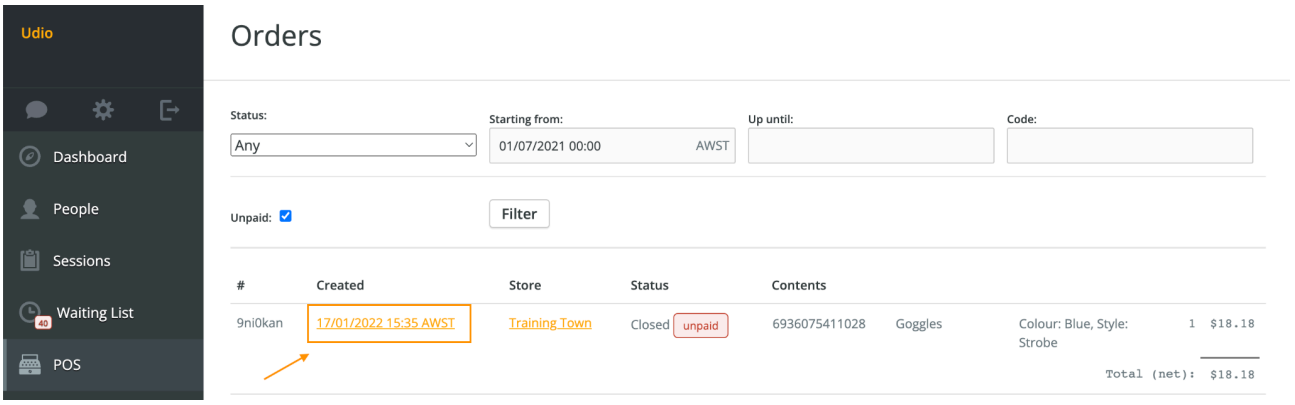
- Under '*All sale orders'* filter by the relevant date and tick *'Unpaid'*
- This will display all unpaid items

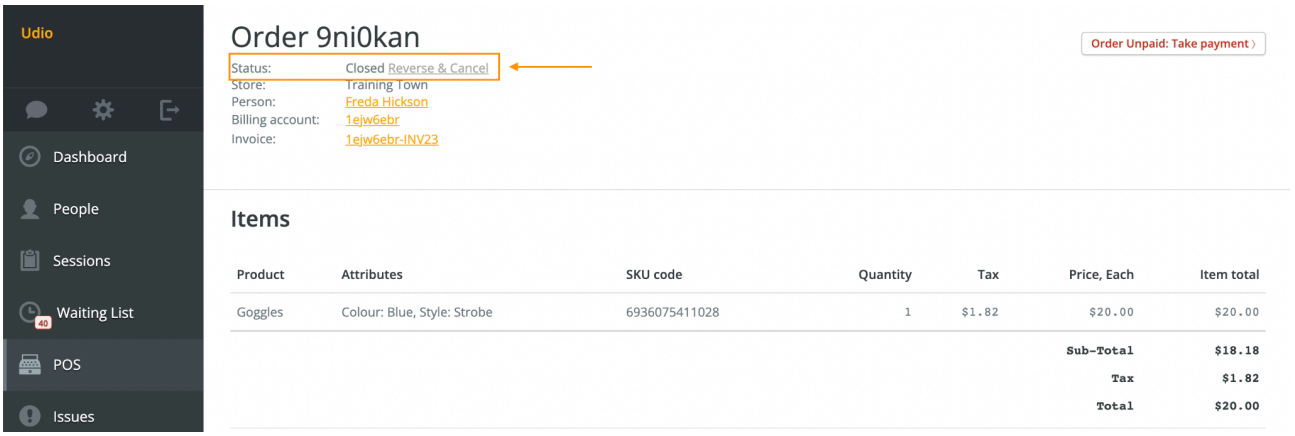


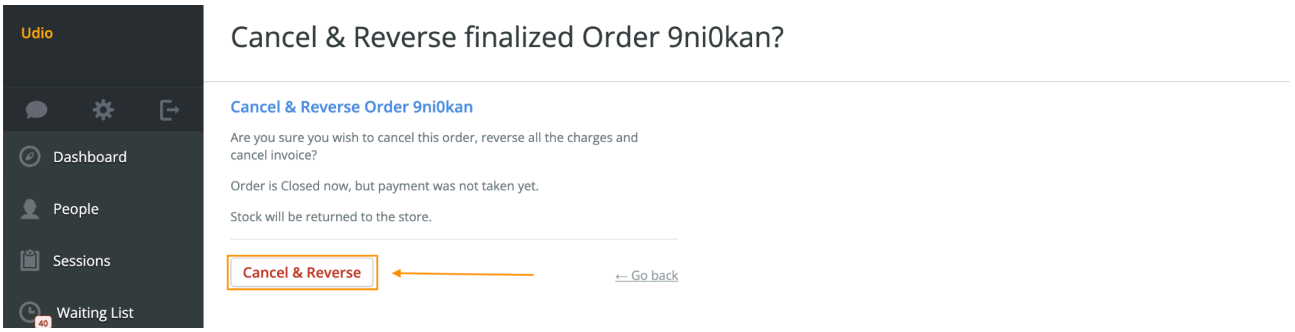
2.2 How to reverse unpaid invoices

- Click on the date and time under *'Created'*
- In the top left-hand corner, it will say *'Status: Closed'*
- Click on *'Reverse & Cancel'*
- Confirm by clicking *'Cancel & Reverse'*

Once you reverse the invoice, your stock will be 'returned' to the store, providing a more accurate stocktake. The reversal will be recorded in the history along with a Note of Cancellation of order _____.




Udio
Dashboard
People
Sessions
Waiting List
POS
Issues
Order 9ni0kan
Status: Closed Reverse & Cancel
Store: Training Town
Person: Freda Hickson
Billing account: 1ejw6ebr
Invoice: 1ejw6ebr-INV23
Order Unpaid: Take payment
Items
Product Attributes SKU code Quantity Tax Price, Each Item total
Goggles Colour: Blue, Style: Strobe 6936075411028 1 $1.82 $20.00 $20.00
Sub-Total $18.18
Tax $1.82
Total $20.00


Udio
Dashboard
People
Sessions
Waiting List
Cancel & Reverse finalized Order 9ni0kan?
Cancel & Reverse Order 9ni0kan
Are you sure you wish to cancel this order, reverse all the charges and cancel invoice?
Order is Closed now, but payment was not taken yet.
Stock will be returned to the store.
Cancel & Reverse
← Go back