



UDIO TRAINING

POS SETUP



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

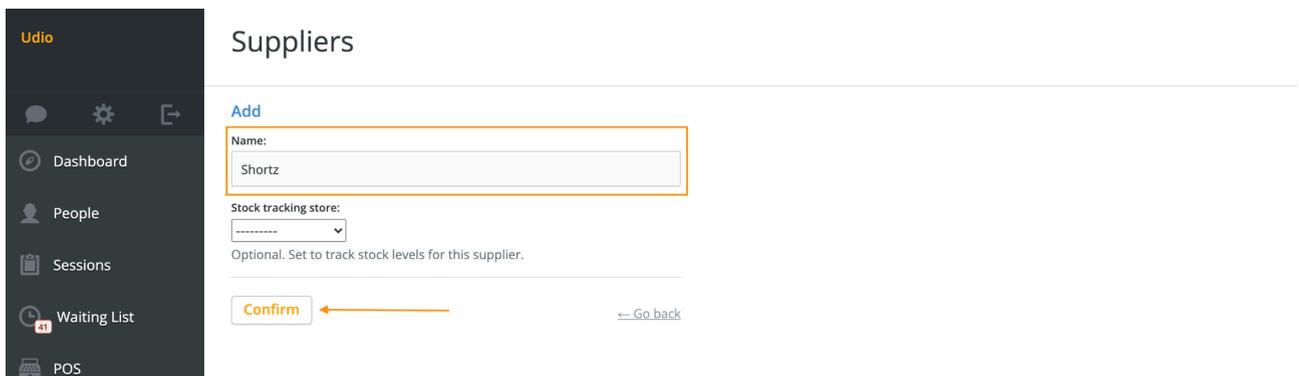
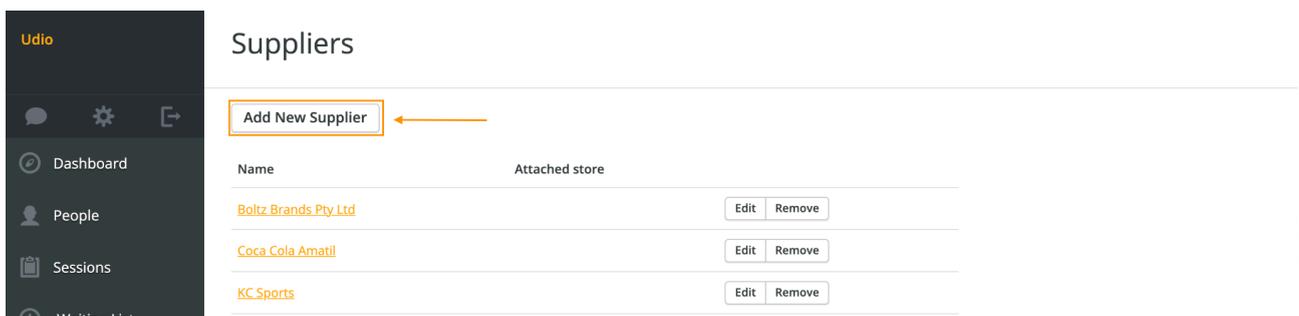
The following categories are located in the **Settings** tab under **Product Catalogue**.

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



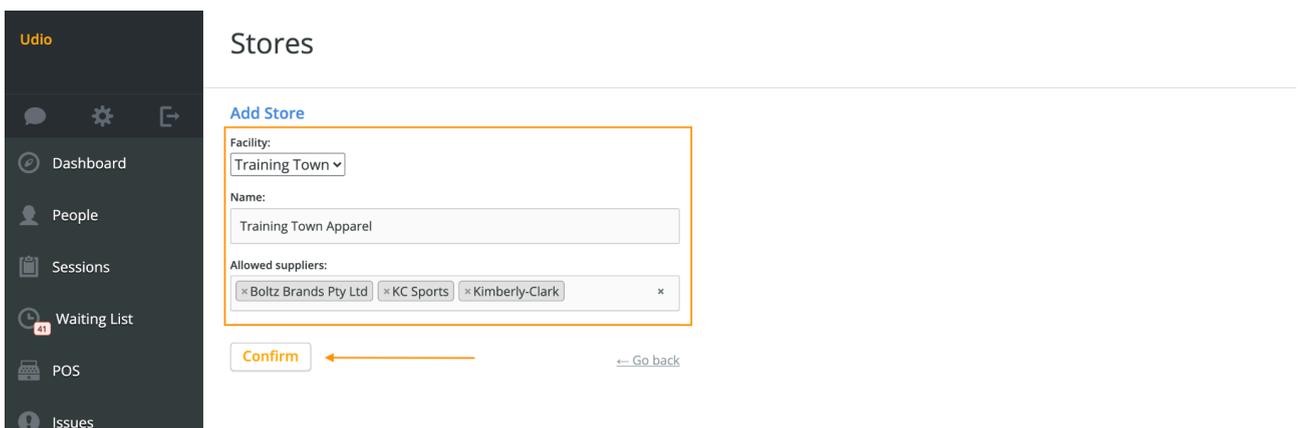
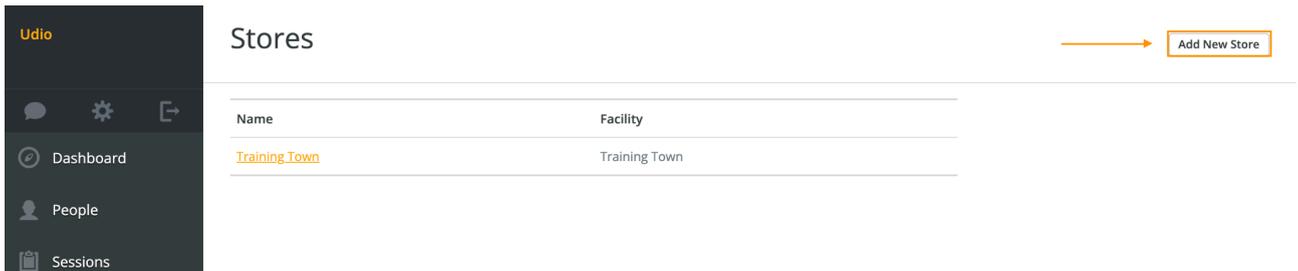
1.2 Stores

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)



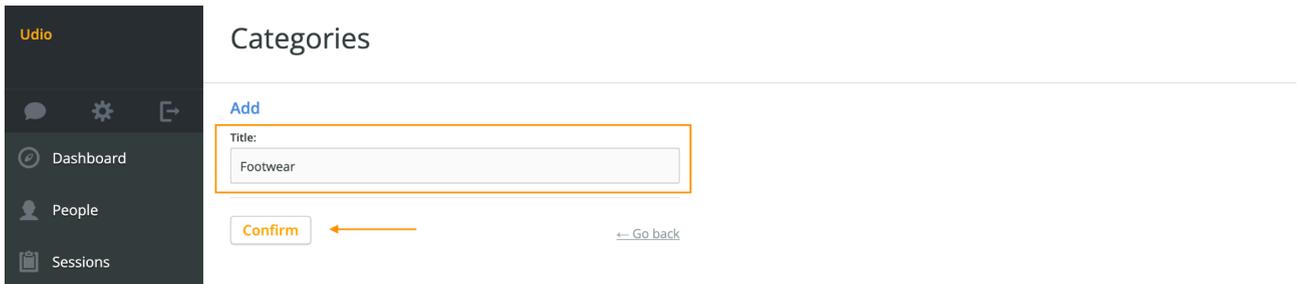
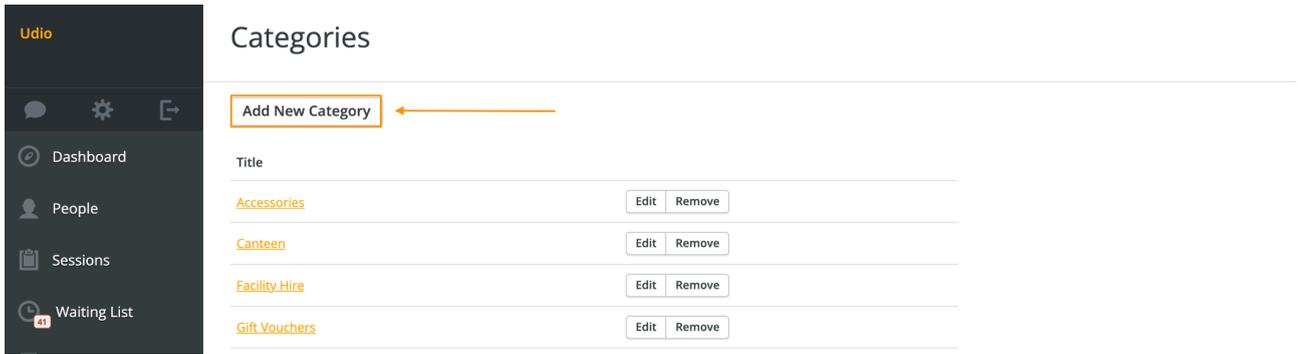
1.3 Categories

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

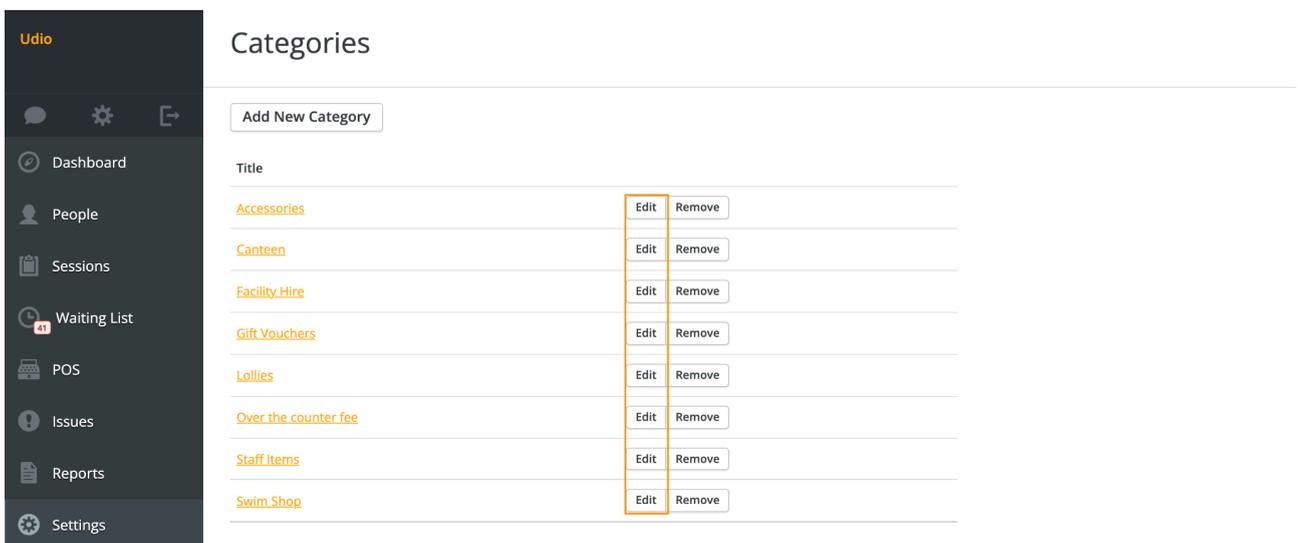
- Click 'All categories' and select 'Add New Category'
- Add a name and click 'Confirm' to save the changes
- Repeat for each of your categories





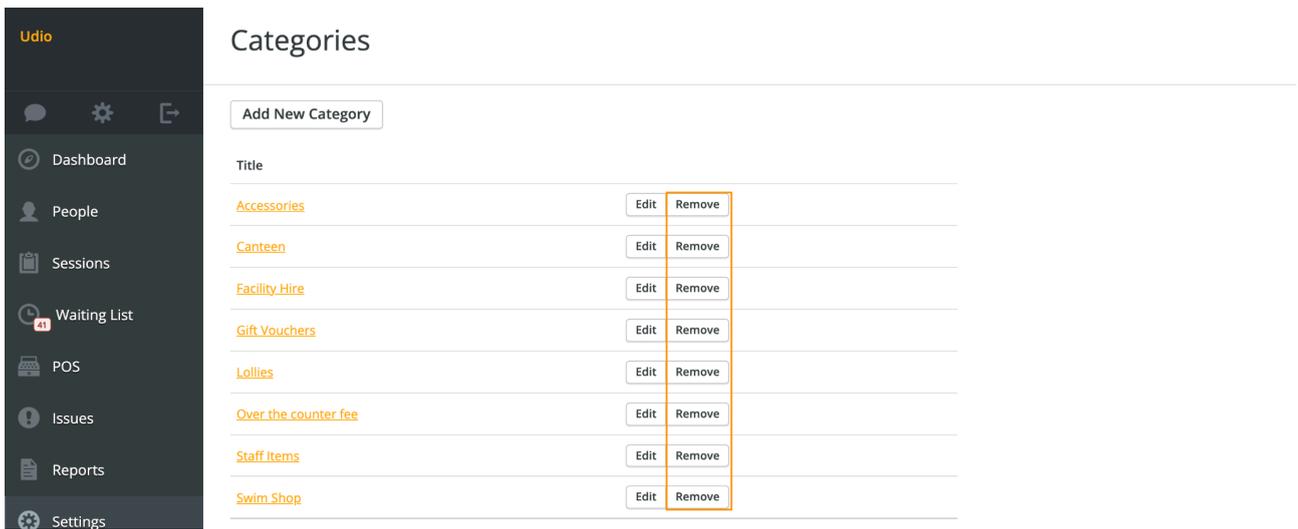
1.3.2 Edit a category

- 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

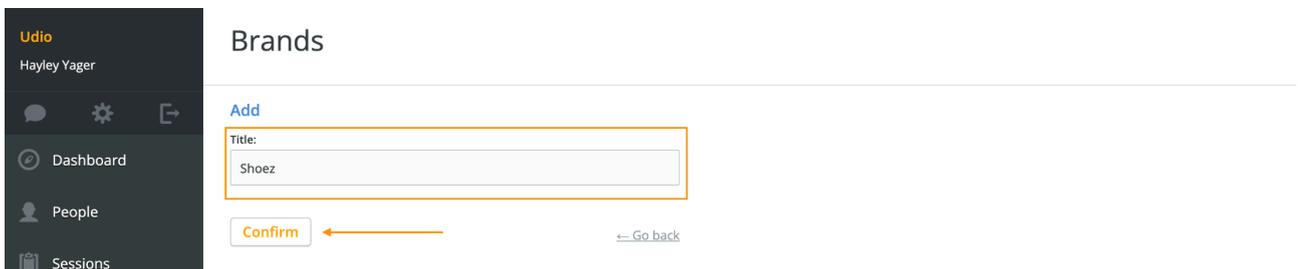
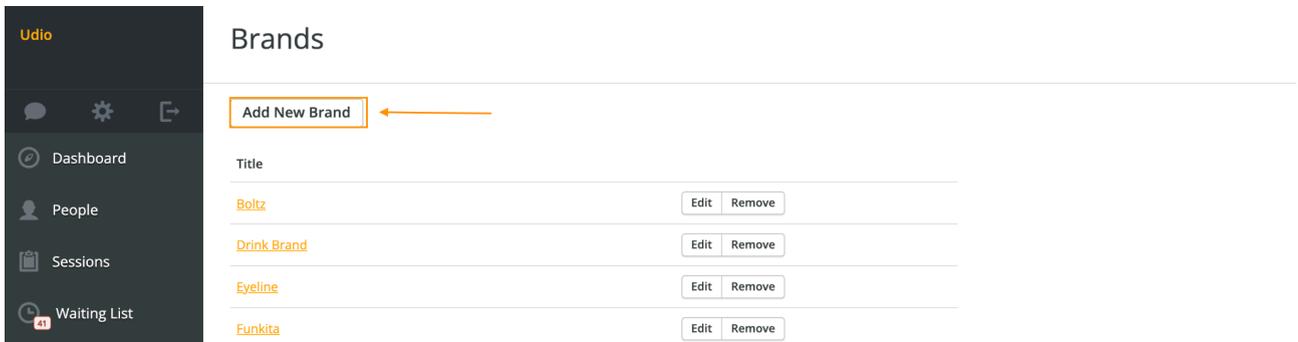


1.4 Brands

A brand is another way to categorise a product.

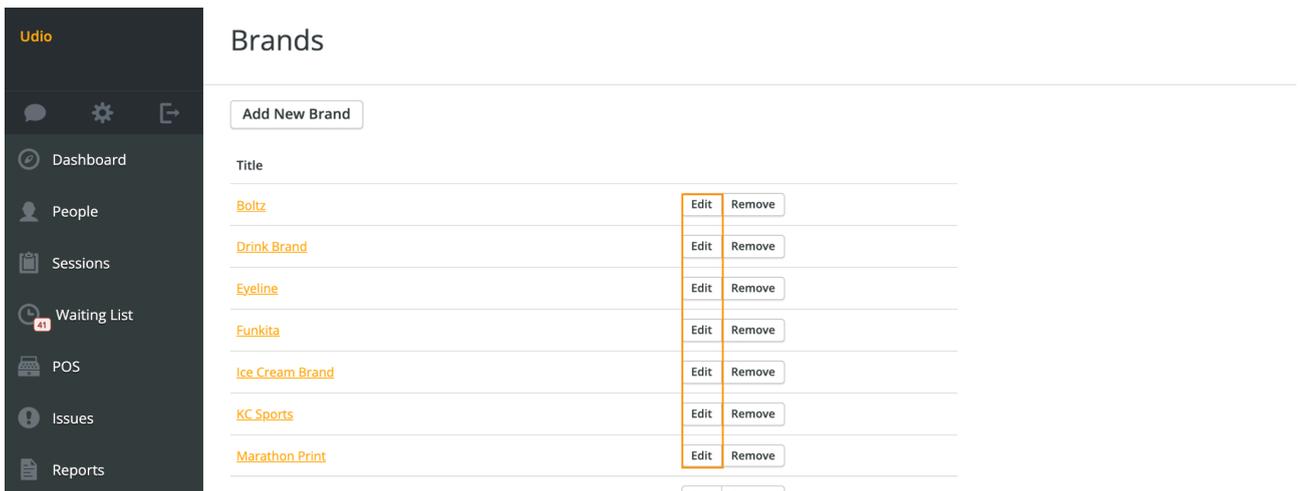
1.4.1 Add a new brand

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



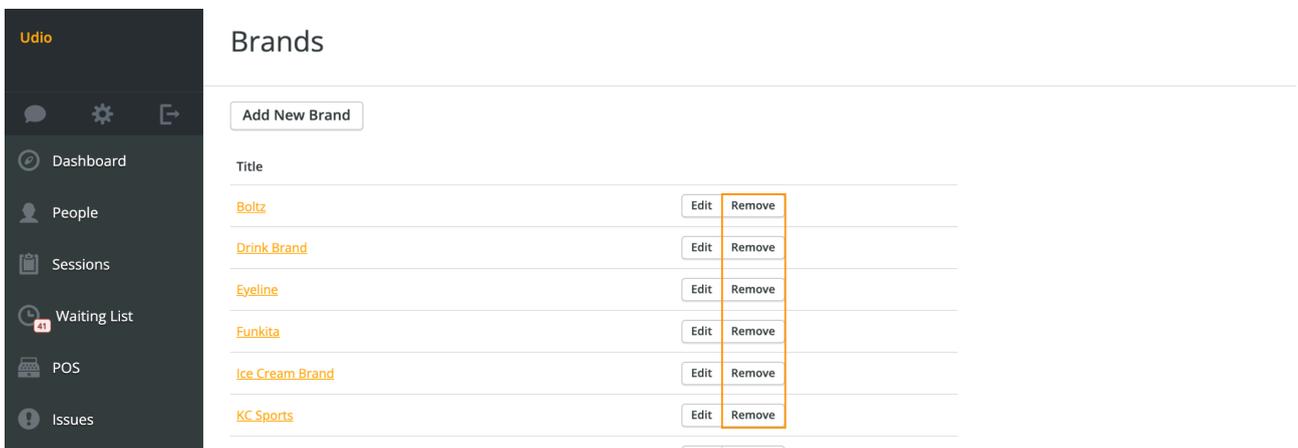
1.4.2 Edit a brand

- 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

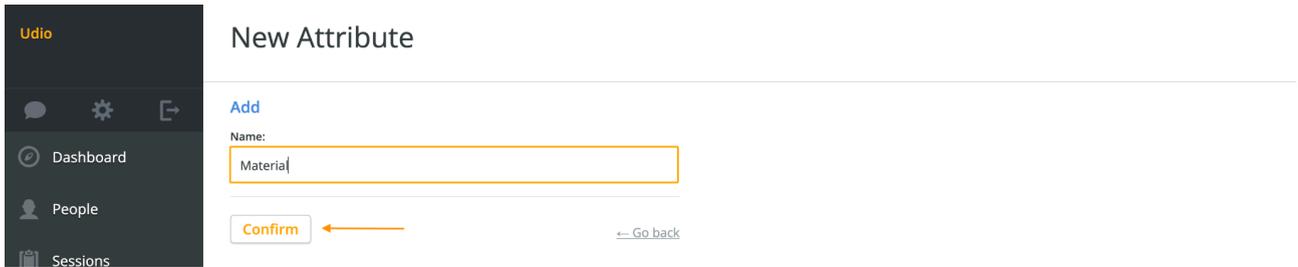
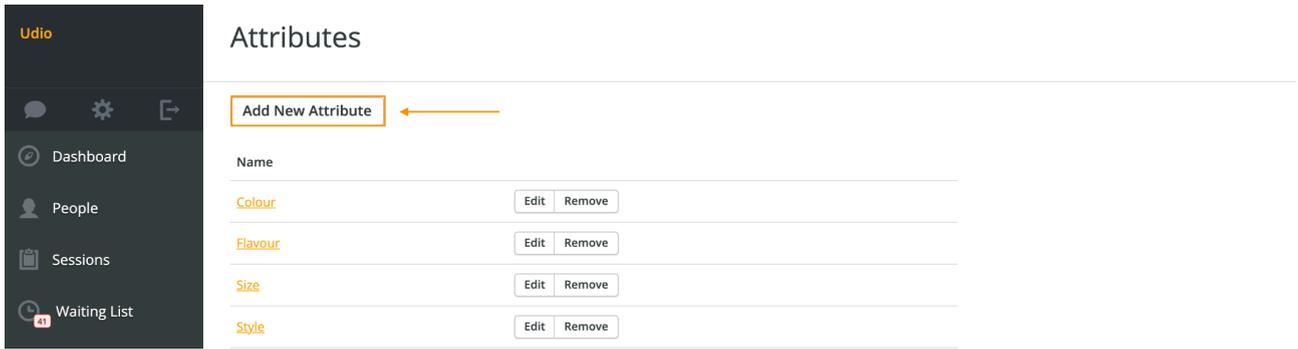


1.5 Product attributes

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.

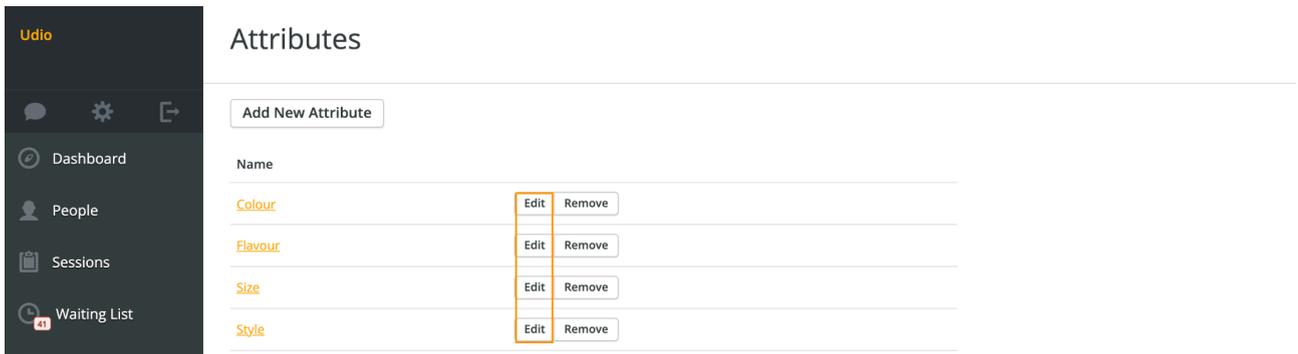
1.5.1 Add a new attribute

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



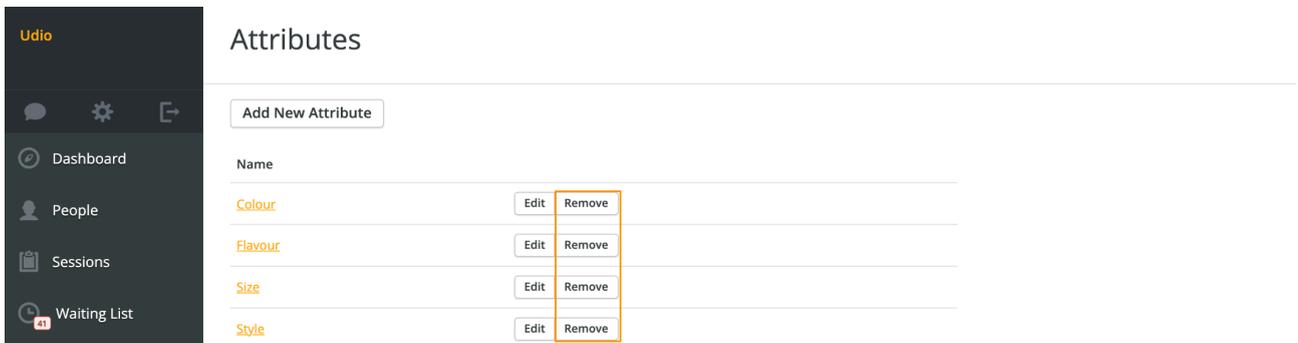
1.5.2 Edit an attribute

- 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.

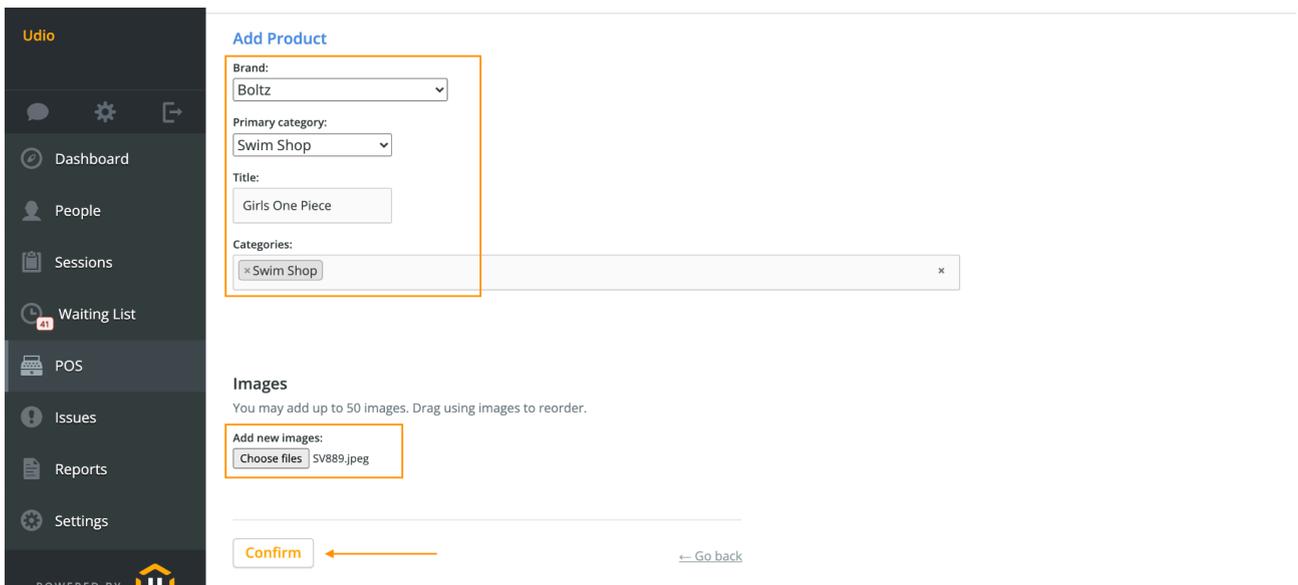
1.6.1 Add a new product

- 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

The screenshot shows the Udio interface with a sidebar on the left containing navigation options: Dashboard, People, Sessions, Waiting List, and POS. The main content area is titled 'Products' and includes a 'Show Removed Products' button. A search bar contains the text 'Girls one piece' and a 'Filter' button. Below the search bar, it displays 'No products to display.' and pagination controls for 'Previous', 'Next', '0 Results', and a 'Reset filter' link.

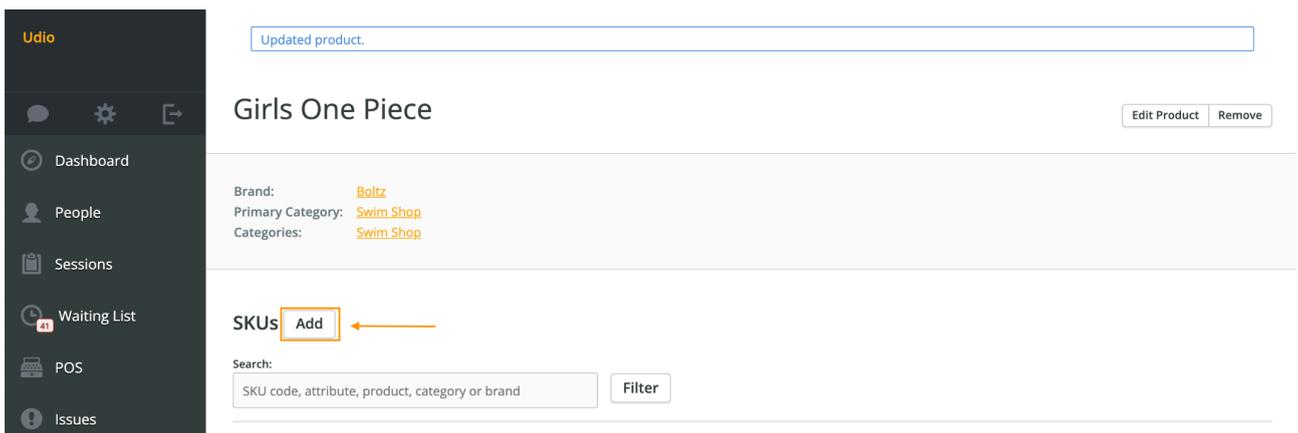
The screenshot shows the Udio interface with a sidebar on the left containing navigation options: Dashboard, People, Sessions, Waiting List, POS, Issues, and Reports. The main content area is titled 'Products' and includes a 'Show Removed Products' button. A search bar contains the text 'Title, category or brand' and a 'Filter' button. Below the search bar, there is a table of products:

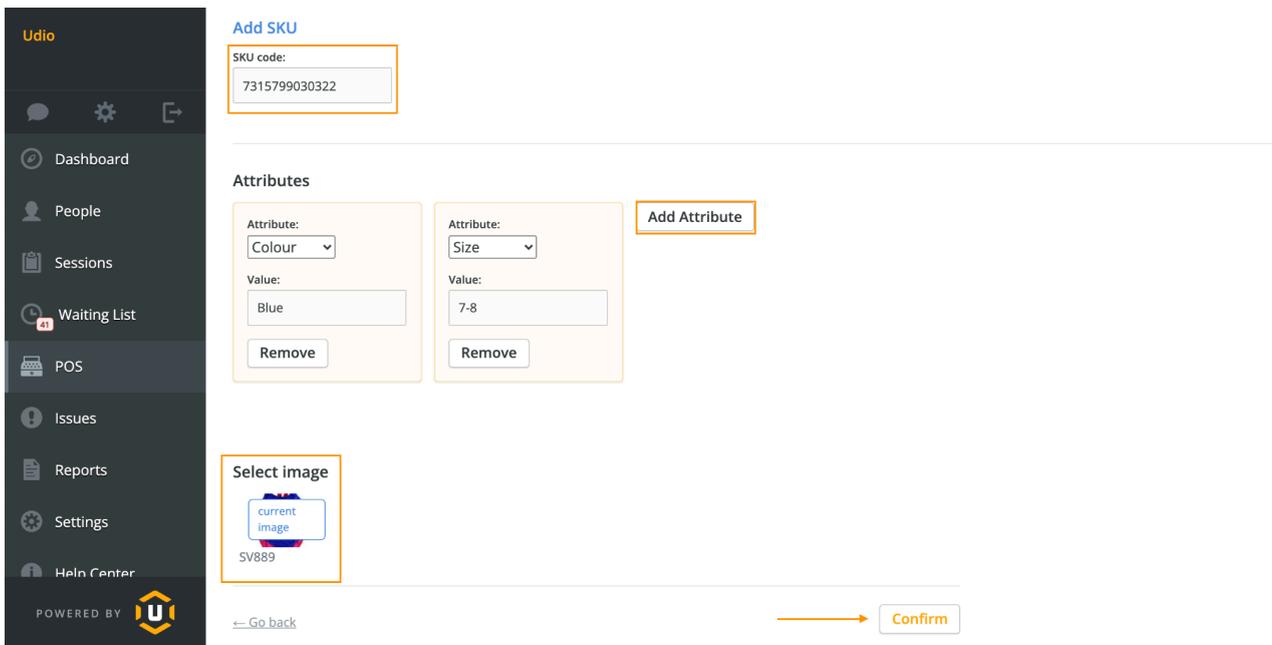
Title	Brand	SKUs	
Basic Swim Shorts	Rival	6	SKUs Edit
Certificates	Marathon Print	3	SKUs Edit
 Coke	Coca Cola	4	SKUs Edit



1.6.2 Add an SKU code

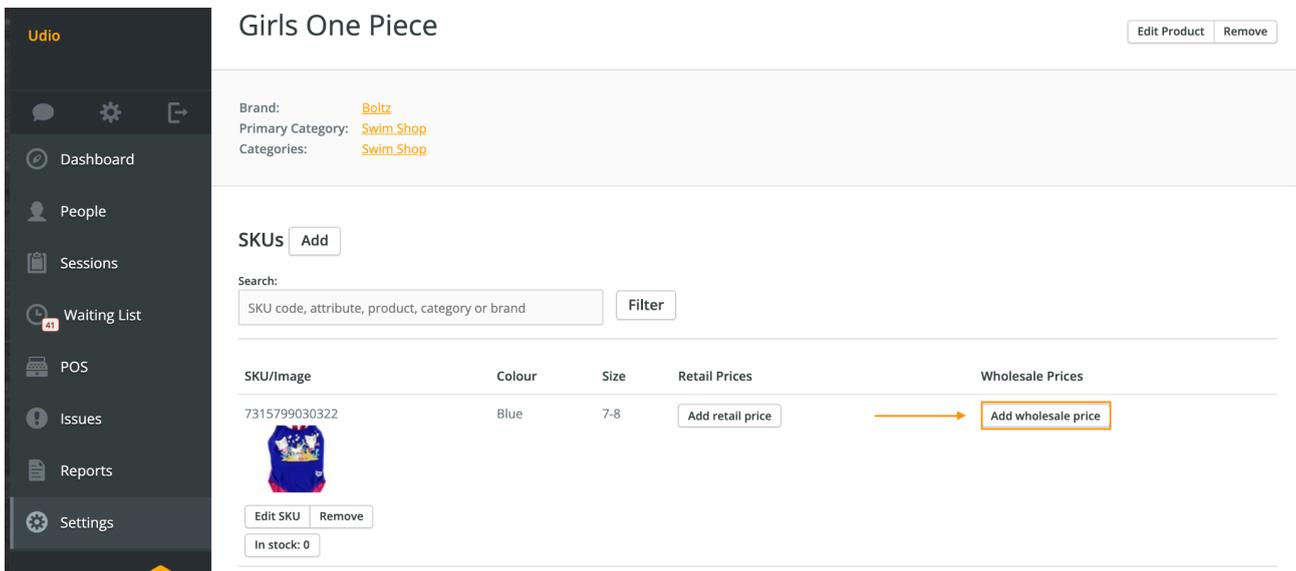
- Following on from the above, click on 'Add' next to SKUs
- Enter or scan the SKU code
- Enter the attributes (you can add multiple by clicking 'Add Attribute')
- Select an image by clicking on the image itself
- Click 'Confirm' to save the changes
- You will now need to add the price for the product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

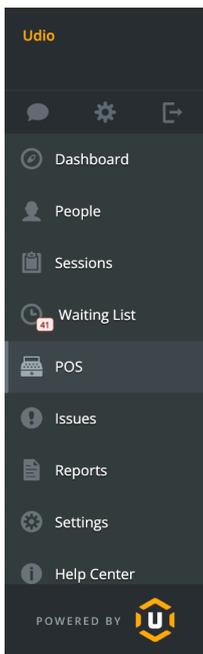




1.6.3 Add a wholesale price

- 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)





Add price

Suppliers:

Start at:

End at:

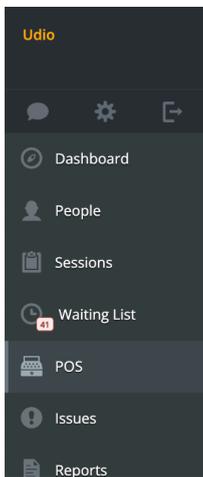
Price (including tax):

Tax rate, %:

Price (excluding tax):

Tax value, \$:

[Add Price](#)



Girls One Piece

[← Back to product](#)

SKU code: 7315799030322
Colour: Blue
Size: 7-8

Wholesale prices

Supplier: Active From: Up until: [Filter](#)

Supplier	Start Date	End Date	Price, Net	Gross	Tax	
Boltz Brands Pty Ltd	active 09/02/2022 00:00 AWST	09/08/2022 00:00 AWST	\$31.82	\$35.00	\$3.18	Edit

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

POWERED BY 

Girls One Piece

[Edit Product](#) [Remove](#)

Brand: [Boltz](#)
 Primary Category: [Swim Shop](#)
 Categories: [Swim Shop](#)

SKUs [Add](#)

Search: [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:

Start at:

End at:

Price (including tax):

Tax rate, %:

Price (excluding tax):

Tax value, \$:

[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

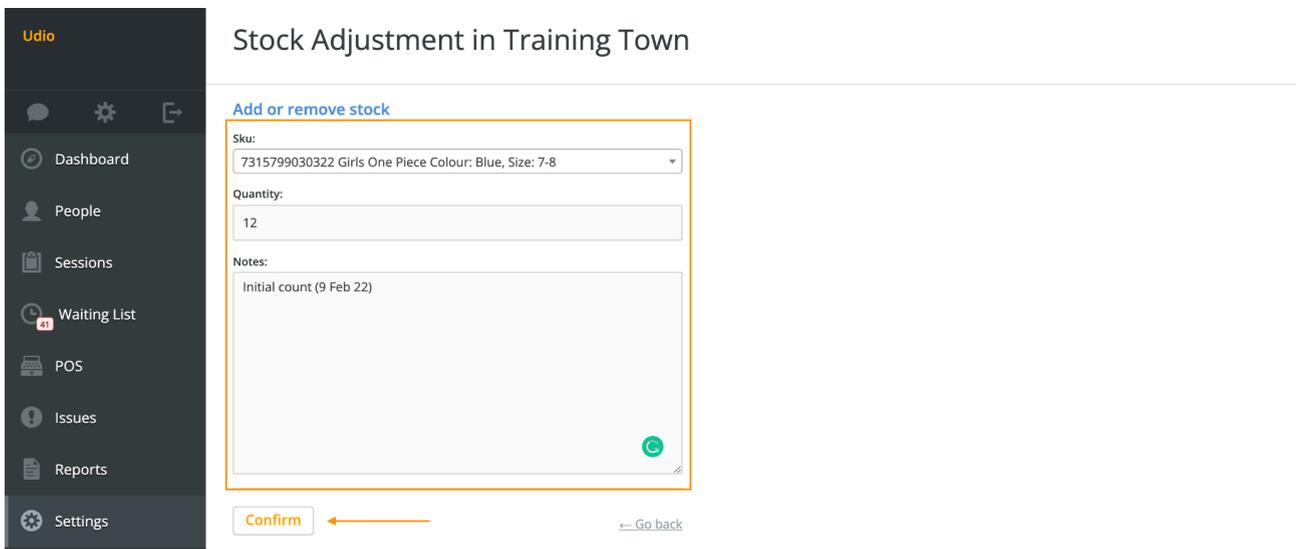
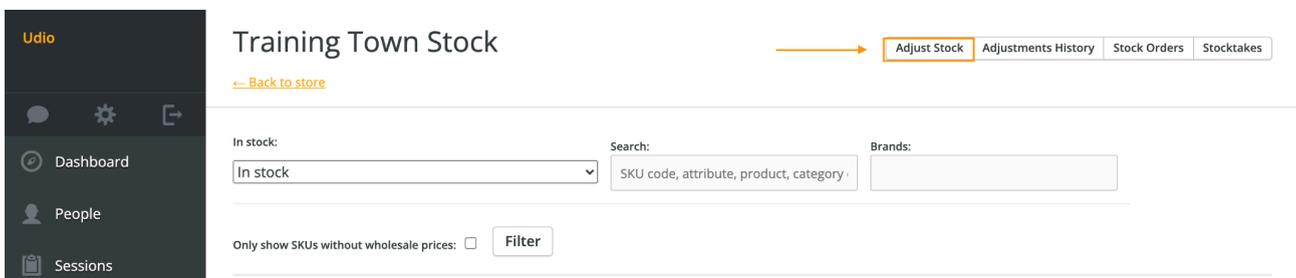
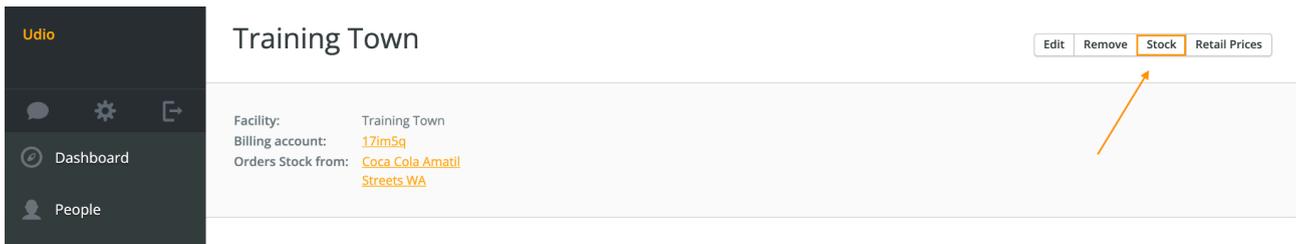
Store: Active From: Up until: [Filter](#)

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



Orders

Status: Any Starting from: 01/07/2021 00:00 AWST Up until: Code:

Unpaid: Filter

#	Created	Store	Status	Contents
9ni0kan	17/01/2022 15:35 AWST	Training_Town	Closed unpaid	6936075411028 Goggles Colour: Blue, Style: Strobe 1 \$18.18 Total (net): \$18.18
8s8r9xg	03/12/2021 09:52 AWST	Training_Town	Closed unpaid	695365874 Goggles Colour: Purple, Style: Dynamo 1 \$18.14 Total (net): \$18.14
g4osheu	23/11/2021 14:13 AWST	Training_Town	Closed unpaid	695365874 Goggles Colour: Purple, Style: Dynamo 1 \$18.14 Total (net): \$18.14

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 _____.

Orders

Status: Any Starting from: 01/07/2021 00:00 AWST Up until: Code:

Unpaid: Filter

#	Created	Store	Status	Contents
9ni0kan	17/01/2022 15:35 AWST	Training_Town	Closed unpaid	6936075411028 Goggles Colour: Blue, Style: Strobe 1 \$18.18 Total (net): \$18.18

Udio

- Dashboard
- People
- Sessions
- Waiting List
- POS
- Issues

Order 9ni0kan

Order Unpaid: Take payment >

Status: [Closed Reverse & Cancel](#) ←
 Store: [Training Town](#)
 Person: [Freda Hickson](#)
 Billing account: [1ejw6ebr](#)
 Invoice: [1ejw6ebr-INV23](#)

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](#)

