



talech

Software Guide
for Retail

01 REGISTER

Overview	03
Creating New Orders	04
Open & Closed Orders	05
Issuing an Item Refund	06
Issuing a Payment Refund	07
Payments	08

02 CASH DRAWER

Settings	09
Cash Drawer Actions	10
Cash Drawer Reports	11

03 TIMESHEETS

Clocking In / Clocking out	12
Timesheet Reports	13

04 REPORTS

14

05 SETTINGS

Overview	15
Taxes	16
Printers	17
Employees	18

06 MENU MANAGEMENT

Adding Items	19
Adding Discounts	20
Adding Categories	21
Edit and Deleting Items	22
Inventory	23
Variations	24

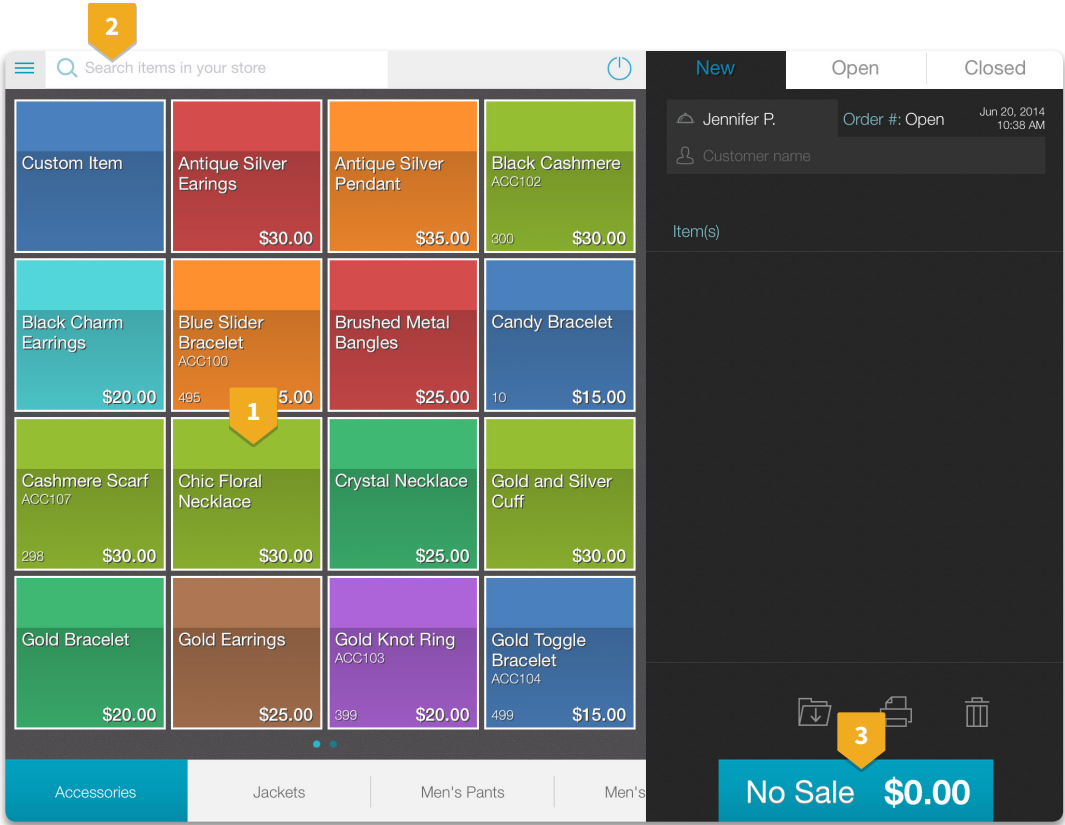
07 CUSTOMERS

Search for a Customer	25
Loyalty Program	26

08 BARCODE SCANNING

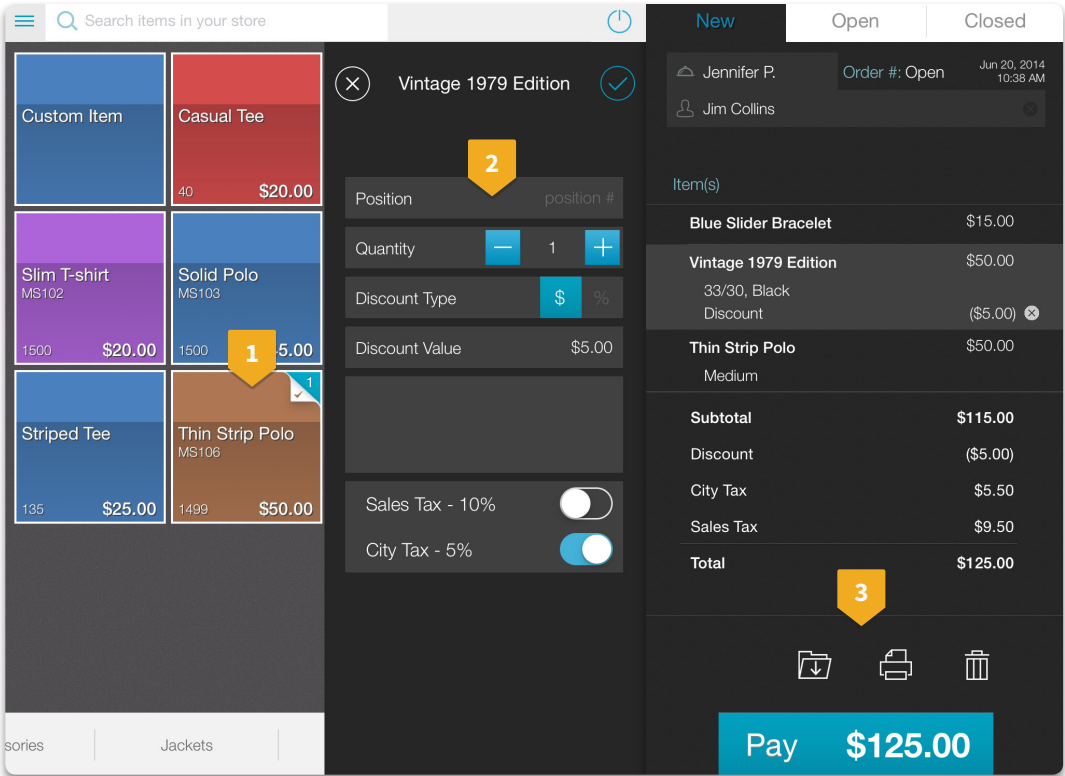
Barcode Scanner	27
Adding New Items	28

REGISTER: THE REGISTER SCREEN OVERVIEW



- 1 The item card contains the following information:
 - Item name
 - Item #
 - Quantity left in inventory
 - Price
- 2 Search for an item by item name, item # or barcode #
- 3 Tap on the “No Sale” button to open the cash drawer.

REGISTER: CREATING AND MANAGING NEW ORDERS



1

Tap on an item to create an order

2

Edit item options by tapping on the item in the order screen. You can edit the following options:

- Item Quantity
- Discount
- Taxes
- Item Notes

3

Use the row of order options to:

- Save an order
- Print receipts
- Delete the order

REGISTER: FINDING OPEN & CLOSED ORDERS

1

NewOpenClosed

Q receipt | customer | cashier

My

June 12, 2014

10:55 PM

Jennifer P.

\$63.25

D7SG >

10:42 AM

Jennifer P.

\$31.50

0BG2 >

June 9, 2014

3:50 PM

Jennifer P.

Jim C.

\$80.00

1H6Z >

June 5, 2014

4:39 PM

Jennifer P.

Jim C.

\$69.00

9SP1 >

2

NewOpenClosed

Q receipt | customer | cashier | cc la...

My

June 19, 2014

1:43 PM

Jennifer P.

Jim C.

(\$21.00)

G95Y >

1:40 PM

Jennifer P.

Jim C.

\$126.60

G95Y >

9:23 AM

Jennifer P.

Jim C.

\$86.20

OW5L >

June 18, 2014

11:25 AM

Jennifer P.

Jim C.

\$84.60

EXAV >

June 17, 2014

1:18 PM

Jennifer P.

Jim C.

\$89.20

FNES >

11:46 AM

Jennifer P.

(\$16.80)

DCLN >

1

Lookup all open orders by tapping on the “Open” tab. Use the tabs below to filter between your orders and all orders in the system. The order are sorted based on most recently updated first.

2

Search for a closed order by the receipt #, employee name, customer name, last 4 digits of the credit card or authorization code.

talech Software Guide

01 REGISTER | 5

REGISTER: ISSUING AN ITEM REFUND

NewOpenClosed

←

Jesse D. Order #: 68E2 Jun 20, 2014 11:16 AM

Customer name

3

Item(s)

2

Gold and Silver Cuff \$30.00

Gold Toggle Bracelet \$15.00

Gold Knot Ring \$20.00

Denim Jacket \$55.00
Blue, Large

Subtotal (\$30.00)

Discount \$0.00

City Tax (\$1.50)

Sales Tax (\$3.00)

Total (\$34.50)

By Item

By Payment

1

CancelRefund

Refund Details

Please confirm the amount of the refund

Trans ID	68E2
Total Amount	\$30.00
Discount	\$0.00
Taxes	\$4.50
Grand Total	\$34.50

4

Confirm Refund

5

Refund Receipt

Item

Refund

Gold and Silver Cuff

(\$30.00)

SubTotal

(\$30.00)

Discount

\$0.00

Taxes

(\$4.50)

Refund Total

(\$34.50)

1

To issue a refund, tap on the “Refund” button

2

Select the items you want to refund

3

Tap “Select All” if you want to refund the entire order

4

Confirm the Refund amount

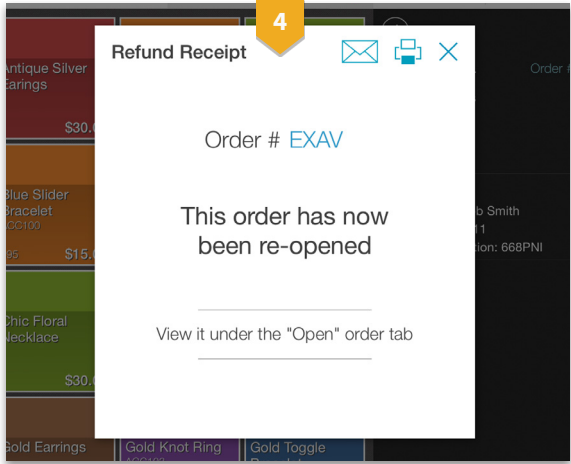
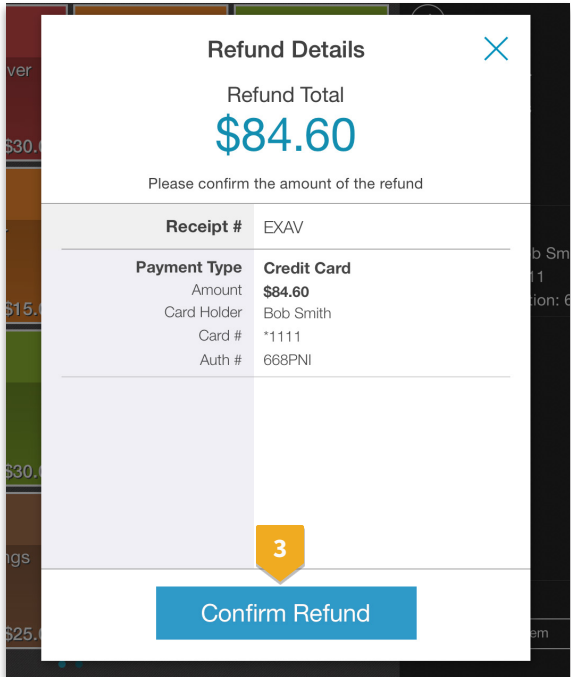
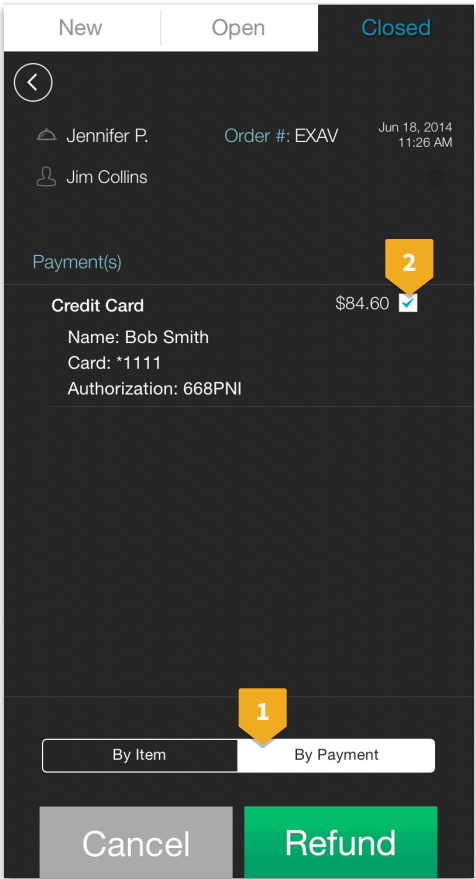
5

Print or e-mail the refund receipt

talech Software Guide

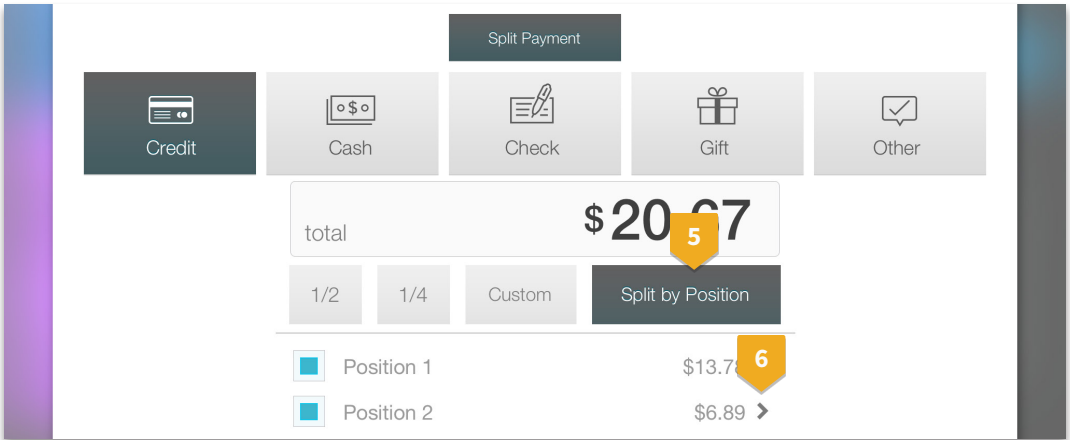
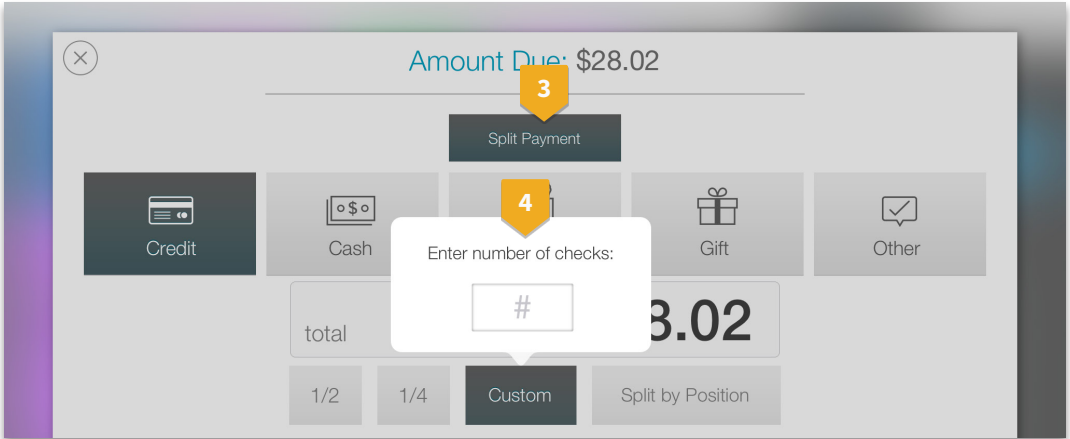
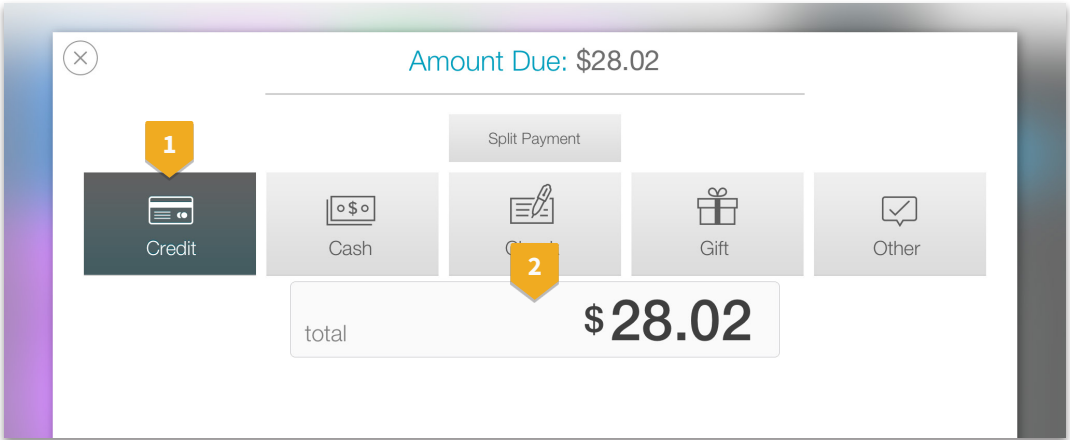
01 REGISTER | 6

REGISTER: ISSUING A PAYMENT REFUND (RE-OPENING AN ORDER)



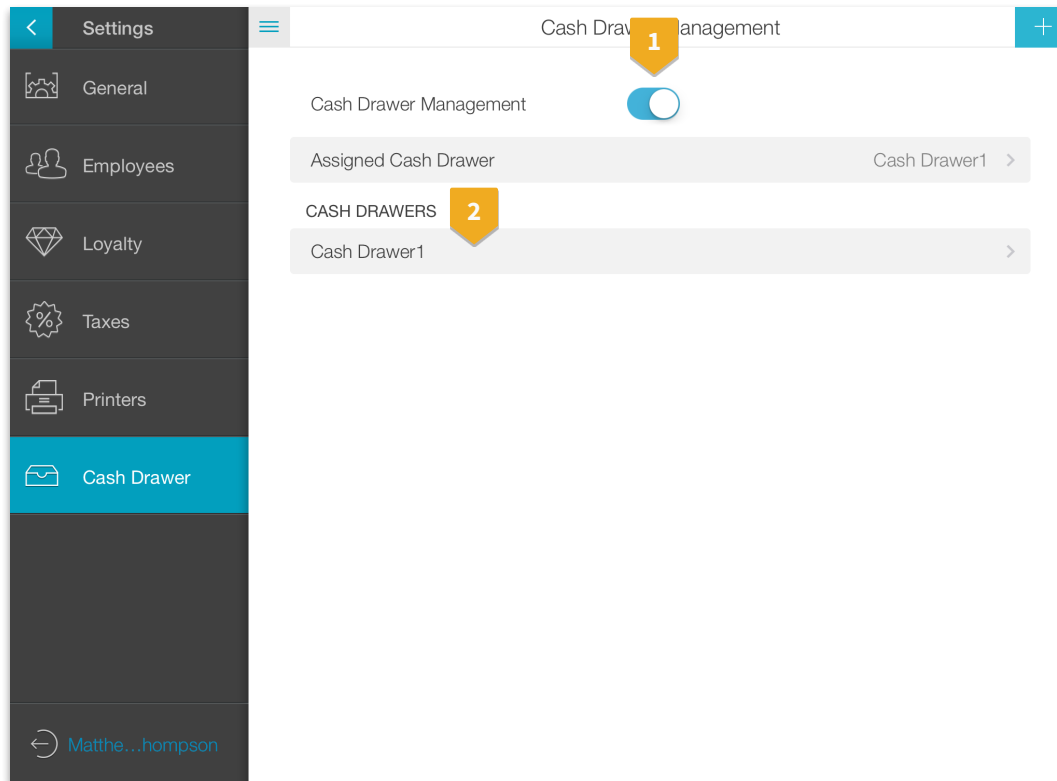
- 1 Select the "By Payment" tab
- 2 Select one or more payments
- 3 Confirm the Refund amount
- 4 Print or e-mail the refund receipt

REGISTER: PAYMENTS



- 1 Select the payment type
- 2 If you want to enter a partial payment for an order, tap on the amount field to edit the value
- 3 Tap on the “Split Payment” tab to split the order by fraction or by position
- 4 The custom button allows you to specify a custom fraction (e.g. split 5 ways)
- 5 Tap on the “Split by Position” button and select one or more positions to pay out.
- 6 Tap on the right of each position row to view the item details for this position

CASH DRAWER: SETTINGS

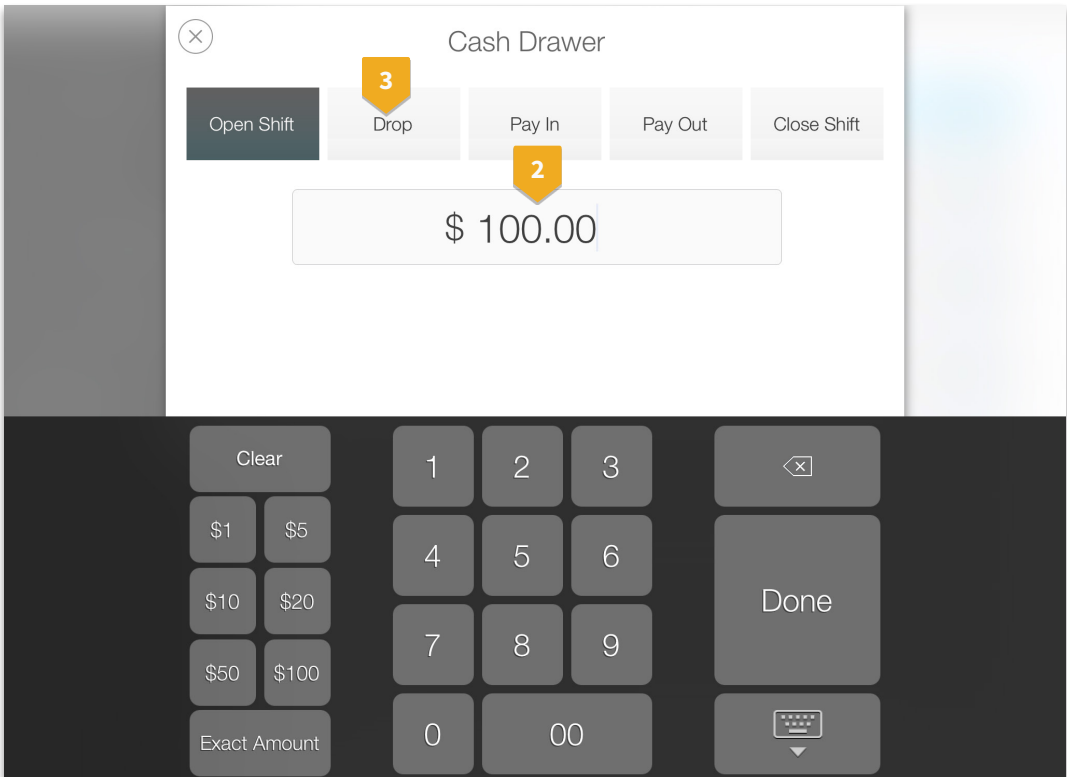
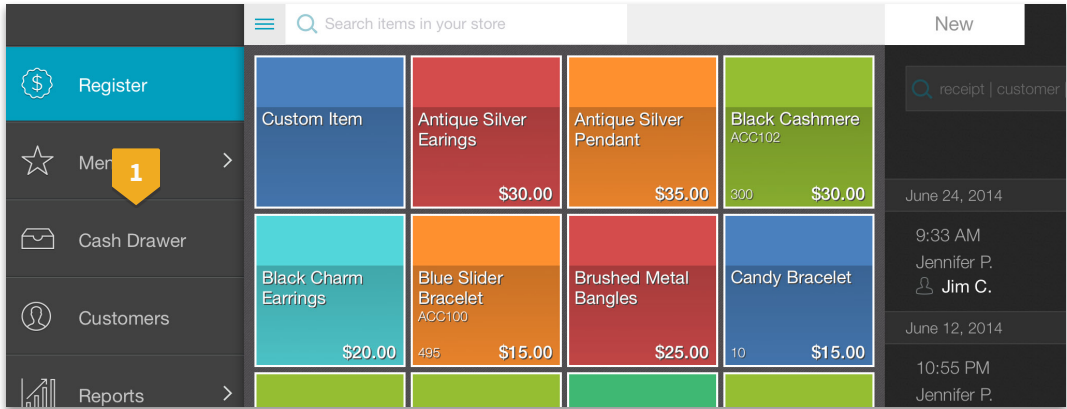


1 To use the cash drawer feature, enable the feature in Settings

2 Select the cash drawer you want to manage from this iPad

Multiple iPads can manage one cash drawer but an iPad can only manage a single cash drawer during a shift

CASH DRAWER: ACTIONS



- 1 Select the Cash Drawer from the left navigation menu
- 2 Enter an opening shift amount
- 3 Use the drop, pay in and pay out buttons to track cash in and out of your cash drawer. At the end of each shift, count the cash in the drawer and enter the closing shift amount

If you have the cash drawer feature enabled, you cannot run any cash sales until you have entered an opening shift amount

CASH DRAWER: REPORTS

← Reports

Summary

Transactions

Sales by Product

Time Sheet

Gift Cards

Cash Drawer

Michael Smith

Cash Drawer | March 09, 2014

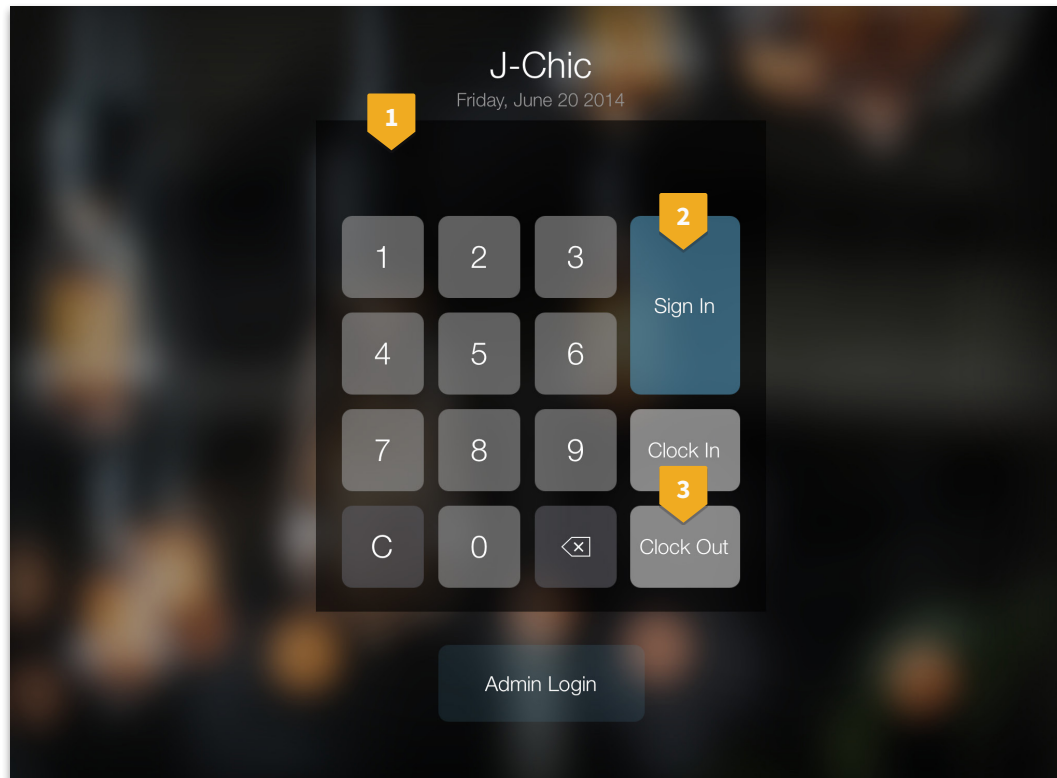
1 Shift #1

Opened by: Tony Henderson | 4:25 pm
Closed by: Brittany Smith | 10:28 pm

Type	# of Transactions	Amount
Opening Cash Amount		2 \$100.00
No Sales	5	\$0.00 >
Sales	5	\$90.60 >
Refunds	1	(\$8.80) >
Drops	1	(\$20.00) >
Pay Ins	1	\$50.00 >
Pay Outs	2	(\$55.25) >
Closing Cash Amount		\$156.65
Net Cash in Drawer		3 \$156.65
Difference		\$0.00

- 1 Select the shift for the cash drawer report
- 2 Tap on an individual row to view details for each transaction of that type
- 3 “Difference” is the Net Cash in Drawer (actual) – Closing Cash Amount (calculated)

TIMESHEETS: CLOCKING IN & CLOCKING OUT



- 1 Enter your PIN and clock-in to start tracking hours
- 2 During the shift, you can sign out and sign in multiple times
- 3 At the end of your shift, logout of the Register to go back to the login screen and clock out to end your shift

Employees of Type “Other” remain on the login screen after clocking in since they don’t have access to the talech Register

TIMESHEETS: REPORTS

1

Reports

June 24, 2014

Time Sheet

Summary

Transactions

Sales by Product

Time Sheet

Gift Cards

Cash Drawer

JENNIFER PARKER

Clock-In	Clock-Out	Time	Total Sales
8am	3:19pm	4 hrs 31 min	\$0.00
Total		4 hrs 31 min	\$0.00
Add Shift			

JESSE DOBSON

Clock-In	Clock-Out	Time	Total Sales
1:49pm	6:04pm	4 hrs 15 min	\$0.00
Total		4 hrs 15 min	\$0.00
Add Shift			

The time sheet report lists the hours worked for each employee in your business along with tips and sales during the shift. This report is also available on talech.com

- 1

The time sheet report is based on calendar day (midnight to midnight) based on the employee’s clock-in time
- 2

To add a shift, tap on the “Add Shift” button and a new row will appear
- 3

To edit hours, tap on the clock in or clock out field and use the time picker to adjust the hours worked
- 4

To delete a shift, swipe to the left and tap on the delete button.

Transactions

Sales by Product

Time Sheet

Gift Cards

Cash Drawer

Clock-In	Clock-Out	Time	Total Sales
8am	3:19pm	4 hrs 31 min	\$0.00
Total		4 hrs 31 min	\$0.00

Now Done

7 45
8 46
9 47
10 48 AM
11 49 PM
12 50
1 51

Clock-Out	Time	Total Sales
6:04pm	4 hrs 15 min	\$0.00
Total	4 hrs 15 min	\$0.00

Add Shift

Summary

Transactions

Sales by Product

Time Sheet

JENNIFER PARKER

Clock-In	Clock-Out	Time	Total Sales
8am	3:19pm	4 hrs 31 min	\$0.00
Total		4 hrs 31 min	\$0.00
Delete			
Add Shift			

REPORTS

< Reports	All Employees	Summary	June 19, 2014	Refresh	Print
Summary					
Receipts					
Sales by Product					
Time Sheet					
Cash Drawer					
Jennifer Parker					

TOTALS	
Receipts	2
Sub-total	\$250.00
Discounts	(\$58.00)
Loyalty	\$0.00
Refunds	(\$20.00)
Net Revenue	\$172.00
Tax	\$19.80
Net Collected	\$191.80
TAXES	
Taxable Revenue	\$172.00
Non-taxable Revenue	\$0.00
Sales Tax	\$11.20
City Tax	\$8.60
Total	\$19.80

Keep track of your business through the Reports section:

Summary: Get a daily summary of sales and receipts. Get breakdown of sales by payment type, product category and employee.

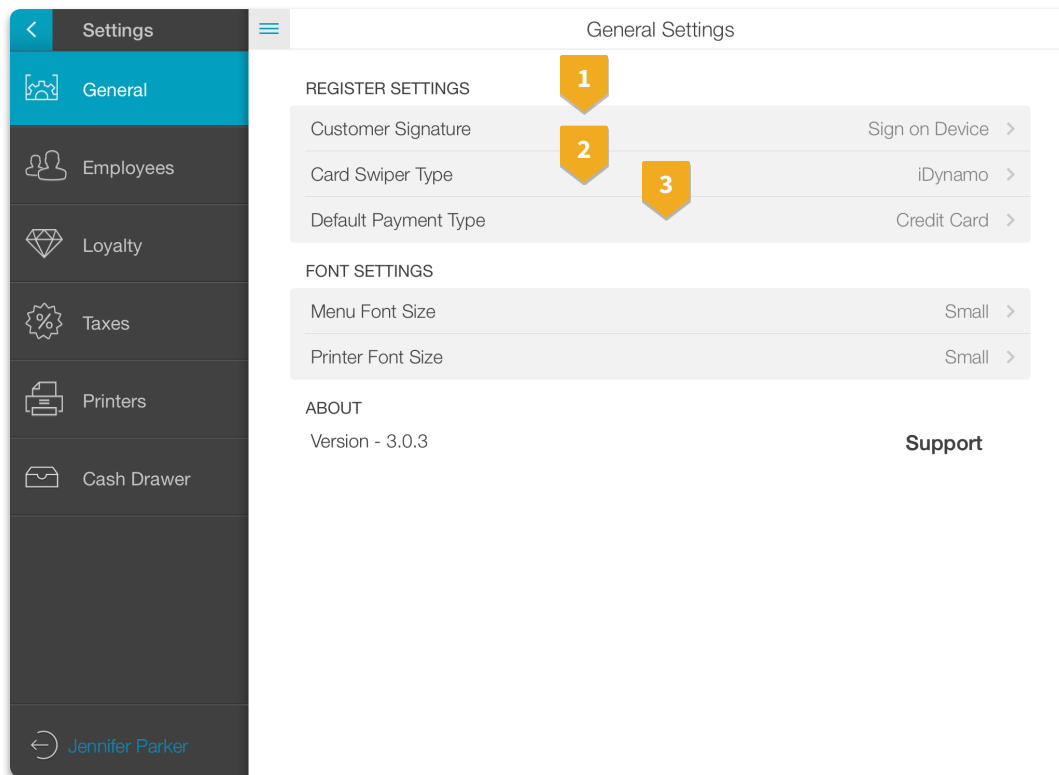
Transactions: View all closed receipts for a given day. Bulk settle and adjust tips.

Sales by Product: View all products sold for a given day along with total revenue and quantity sold.

Time Sheet: View hours worked per employee. Add and edit employee hours.

Cash Drawer: View all transactions in and out of your cash drawer per shift

SETTINGS: OVERVIEW



1

The customer signature setting controls how customers sign on receipts. This is a per device setting:

Select “Sign on device” if you want customers to sign and apply tips on the device.

Select “Sign on paper” if you want customers to sign on paper receipts

2

The card swiper type is a per device setting

Select uDynamo if your card swiper connects to the headphone/audio jack on your iPad

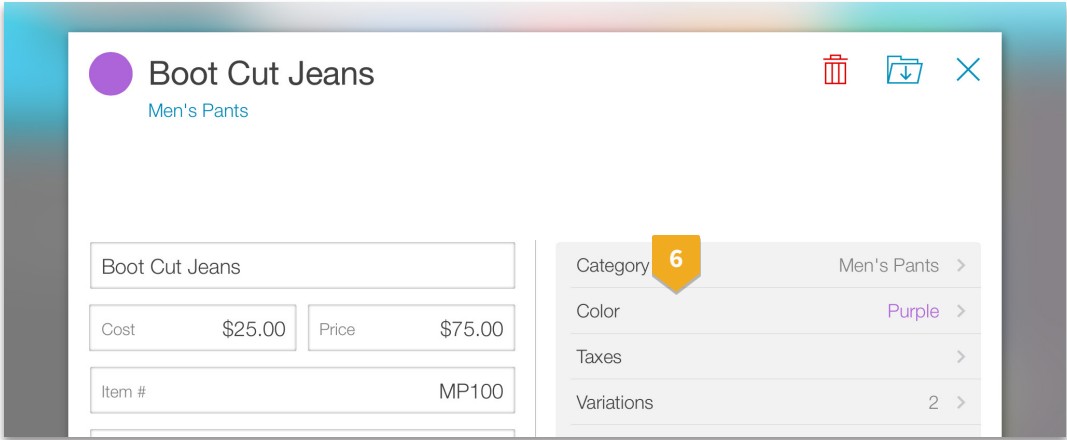
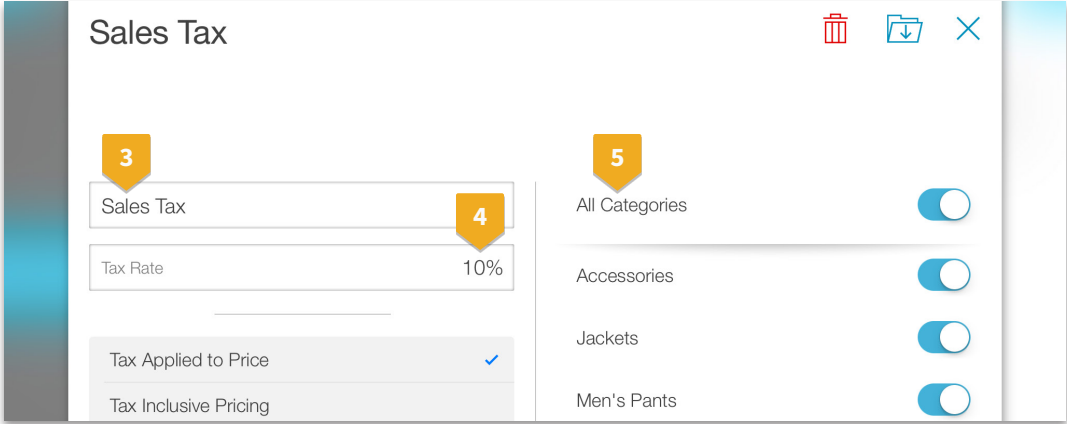
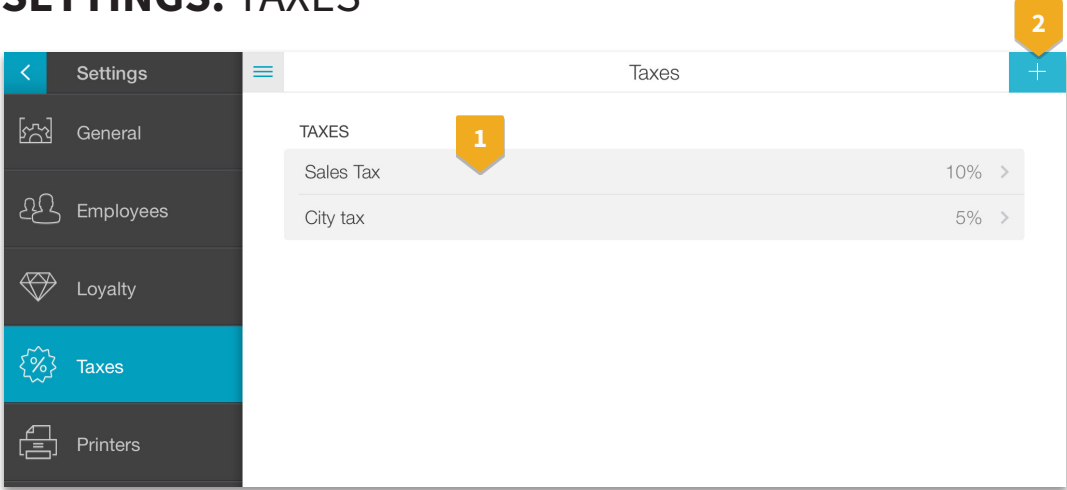
Select iDynamo if your card swiper connects to the power interface on your iPad

3

The Default Payment Type is a per device setting

It controls the default payment tab selected when you tap on the Pay button in the Register

SETTINGS: TAXES



1 Tap on an existing tax to review details and make changes

2 Tap the add button to create a new tax

3 Specify the tax name and tax rate

4 Select how taxes are added to item prices. Take the following example where your item price is \$10 and your tax rate is 10%.

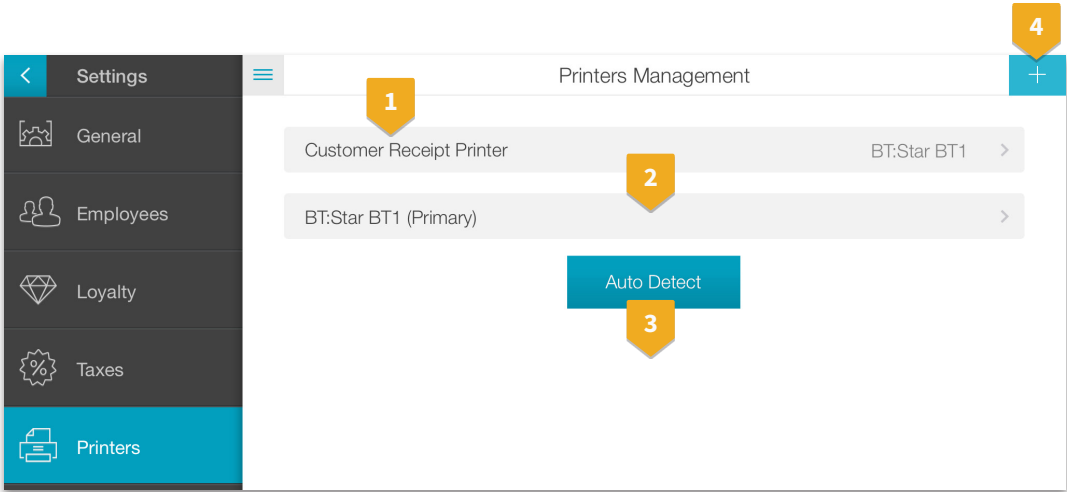
If you select “Tax applied to item price” then the total is: \$10 (item price) + \$1 (tax) = \$11

If you select “Tax included in item price), then the total is \$9.09 (adjusted item price) + \$0.91 (tax) = \$10.

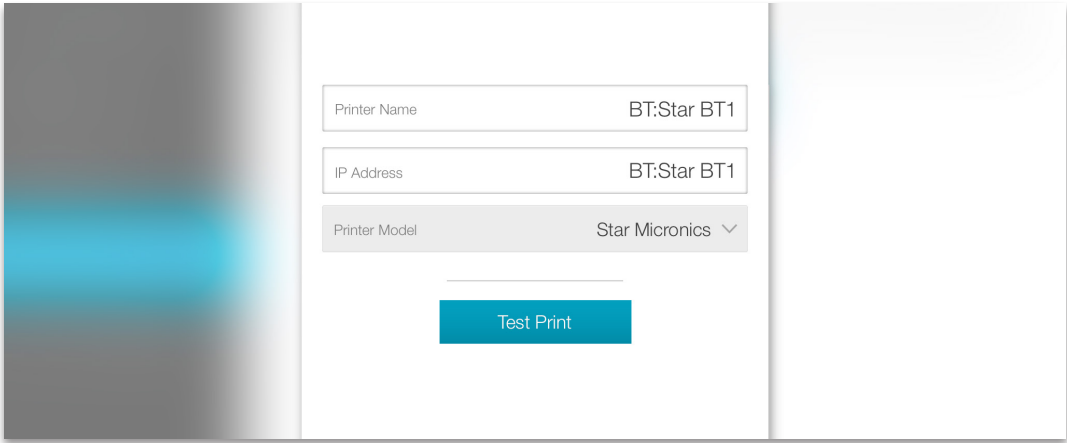
5 You can control the tax setting per category

6 You can override the default category tax setting at the item level

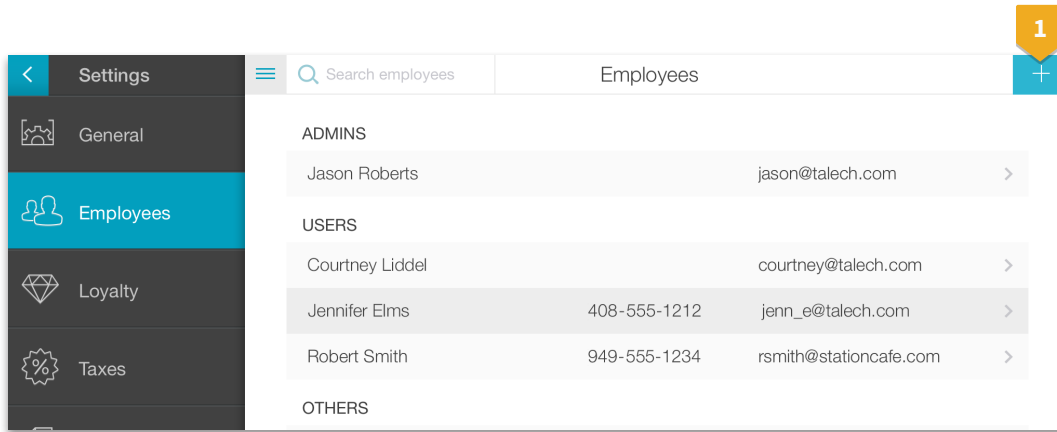
SETTINGS: PRINTERS



- 1 Tap on “Customer Receipt Printer” to select your receipt printer from the list of available printers
- 2 Tap on a printer in the list to view and edit printer settings
- 3 Tap on “Auto Detect” to find all the printers in your business
- 4 Tap on the add button to manually add a printer



SETTINGS: EMPLOYEES



Tap on an employee name to view and edit employee information

1 Tap on the add button to add a new employee

2 Select the employee type:

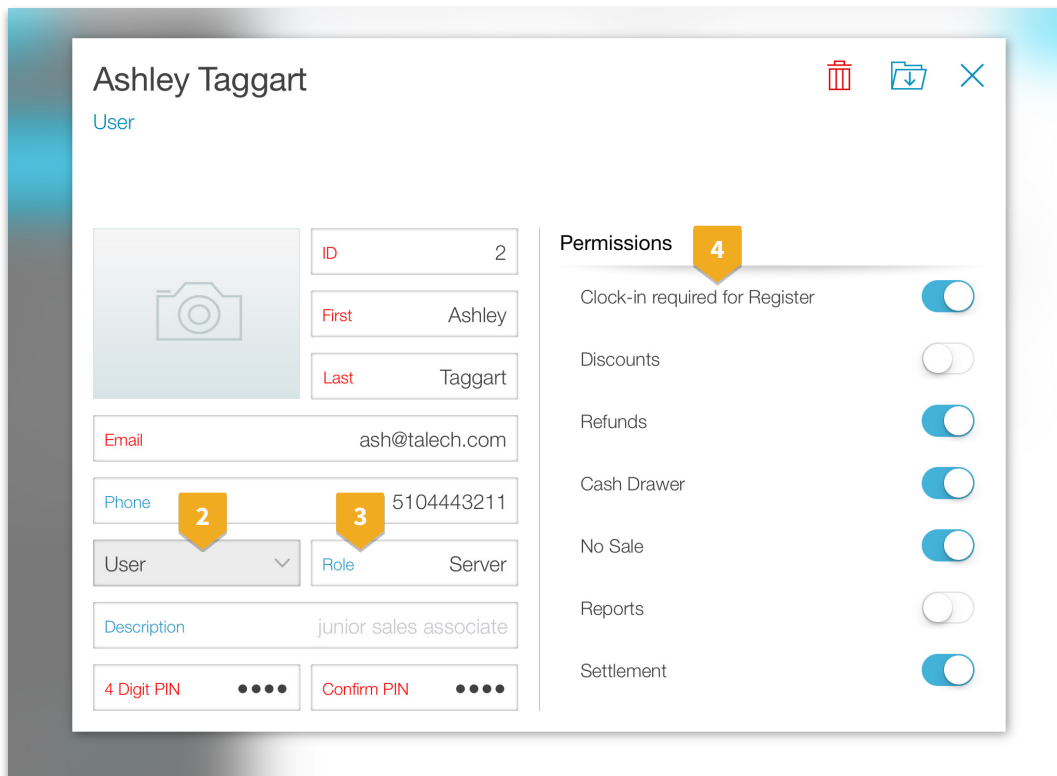
“Admin” has full access to the system including talech.com.

“User” can only take orders and apply discounts. You can control access through permissions

“Other” can only use the talech Register to clock-in and clock-out. You can assign this role to kitchen staff or other employees for logging hours worked.

3 “Role” and “Description” are optional fields to describe the employee’s job functions.

4 Set the clock-in flag to ON if you require that employees must clock-in before taking order and running sales



MENU MANAGEMENT: ADDING ITEMS

Boot Cut Jeans

Men's Pants

1

Boot Cut Jeans

Cost

\$25.00

Price

\$75.00

Item #

MP100

Barcode #

2

barcode

Track Qty.

160

Category

Men's Pants

>

Color

Purple

>

Taxes

>

Variations

2

>

Add-Ons & Exclusions

>

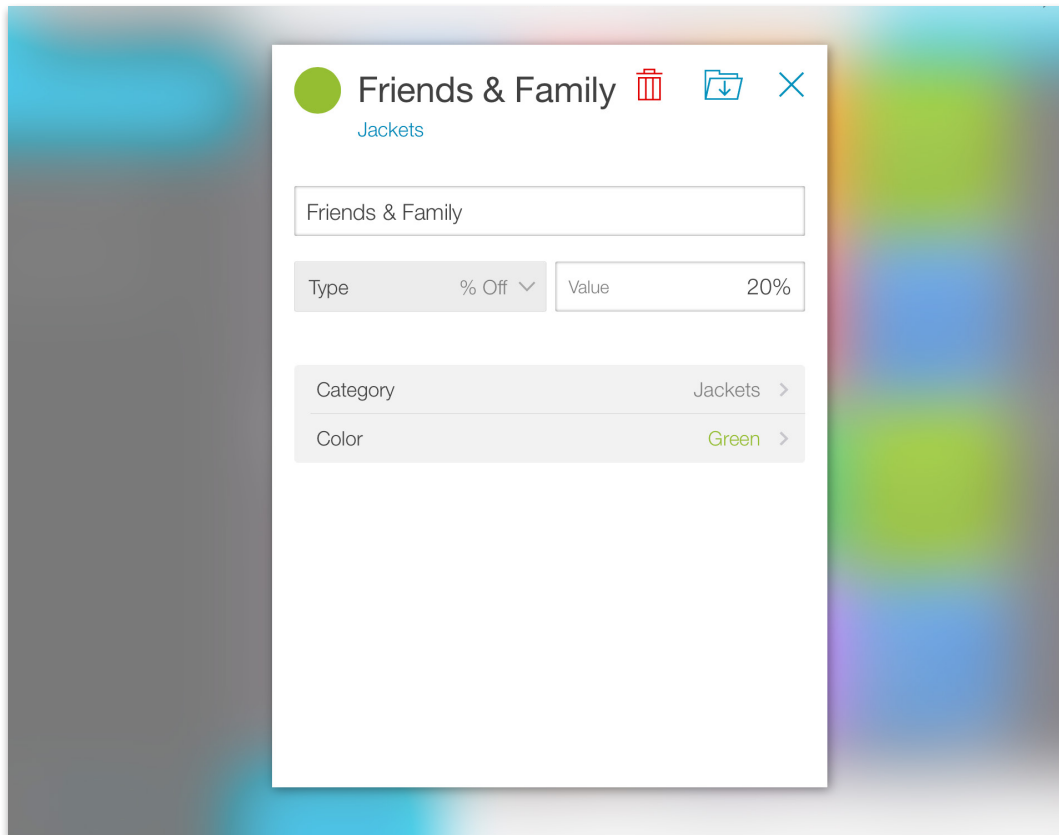
You can manage your menu through the talech Register app or through talech.com

Go to “Menu” under “Settings” and tap on the “Add” button

1 Add a Product: Specify a product name and price. You can optionally enter the cost, item # and barcode #.

2 If you want track inventory, enable “Track Quantity” and enter the quantity.

MENU MANAGEMENT: ADDING DISCOUNTS

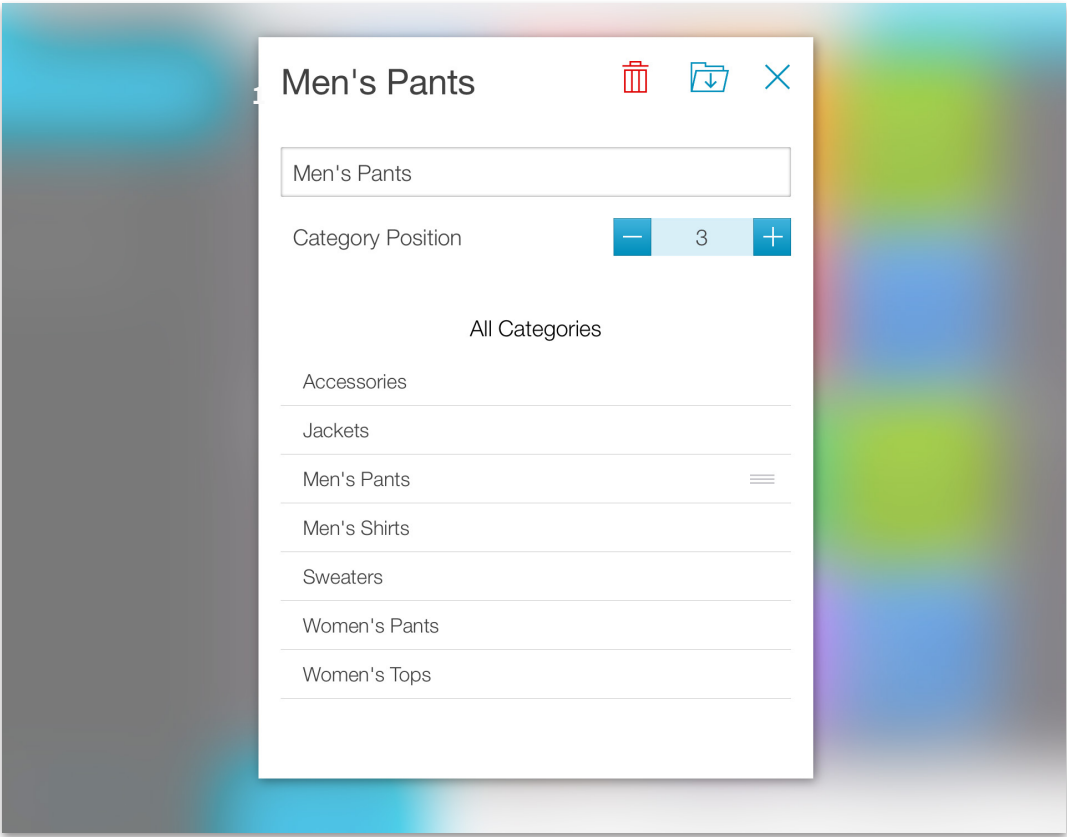


The screenshot shows a modal window for adding a discount. At the top, there is a green circular icon, the text 'Friends & Family', and three icons: a trash can, a folder with a download arrow, and a close 'X' button. Below this, the word 'Jackets' is displayed in blue. A text input field contains 'Friends & Family'. Below the input field, there are two sections. The first section has a 'Type' label, a '% Off' dropdown menu, and a 'Value' input field containing '20%'. The second section has a 'Category' label, the text 'Jackets', and a right-pointing arrow. Below this, there is a 'Color' label, the text 'Green', and a right-pointing arrow.

Add an Order Discount:

Specify a discount name, discount type and value. An order discount is applied towards the entire order. The Category setting only control which category is this discount located it. Global discounts are applicable to all products within the order regardless or category.

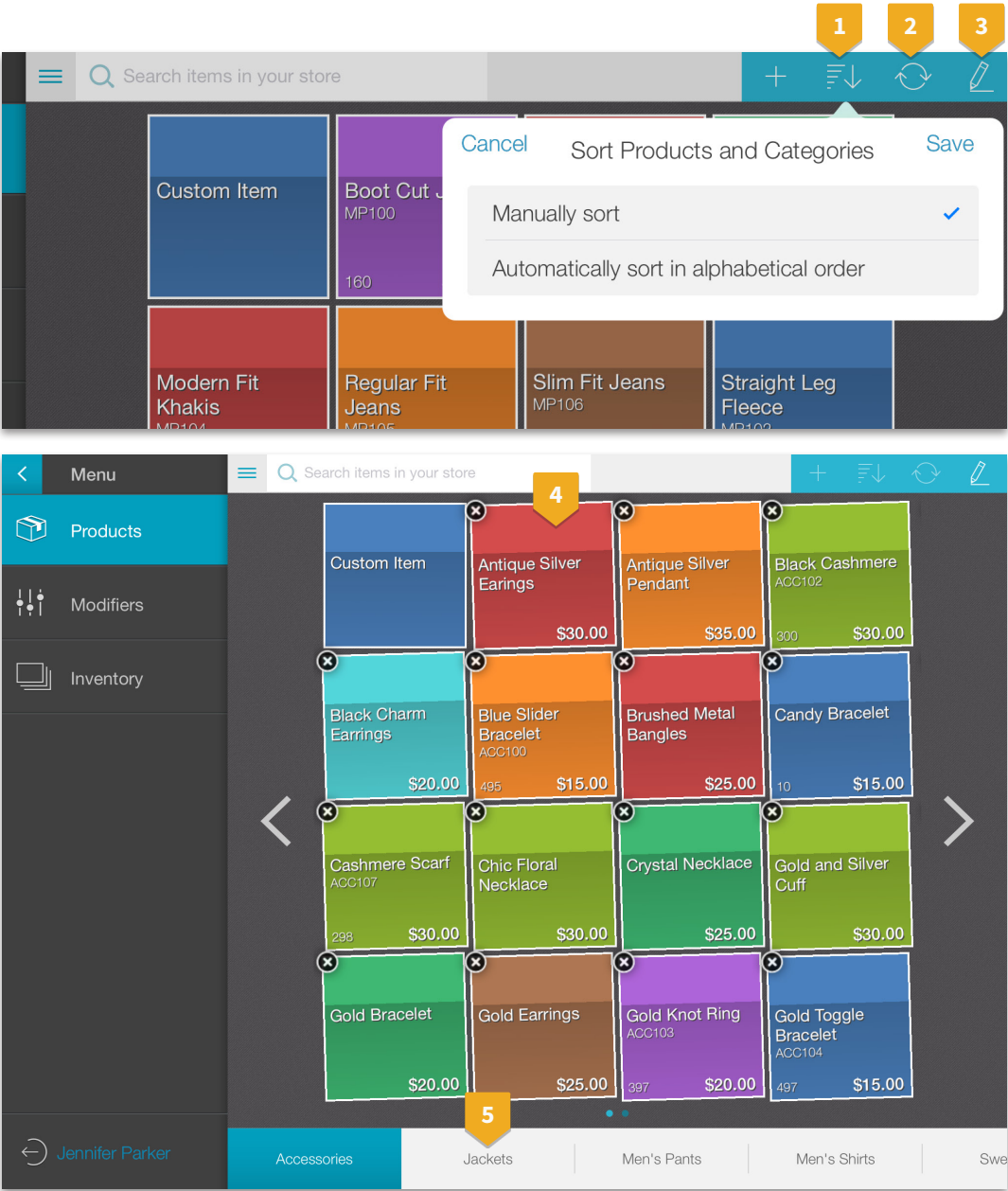
MENU MANAGEMENT: ADDING CATEGORIES



Add a Category:

Tap on the Category tab. The position number is the horizontal position of the category as it appears in your register.

MENU MANAGEMENT: EDIT YOUR MENU



- 1 Tap the sort button to control how your products and categories are sorted
- 2 Tap the reload button to download the most up to date version of your menu
- 3 Tap on the “Edit” button to move and delete items. Tap “Done” once you have finished making changes to your menu.
- 4 To move an item, press and hold the item card and drag it to its new position
- 5 To modify your category settings, press and hold the category name

MENU MANAGEMENT: INVENTORY

<

Menu

Products

Modifiers

Inventory

Jennifer Parker

Q name, barcode #, or item #

Inventory

2

Category	Product	Barcode	Quantity
Women's Tops	Baseball T: X-Small	TN2KJYJ8	500
Women's Tops	Baseball T: Small	TNA3DGUH	500
Women's Tops	Baseball T: Medium	TNQ9UWCY	3
Women's Tops	Baseball T: Large	TNSMMH3A	500
Women's Pants	Boot Cut Jeans: 2	TNWFQK1N	500
Women's Pants	Boot Cut Jeans: 4	TNHPWGW3	500
Women's Pants	Boot Cut Jeans: 8	TN9QRZHA	500
Men's Pants	Classic Corduroy: 30/30		500
Men's Pants	Classic Corduroy: 30/32		500
Men's Pants	Classic Corduroy: 32/32		500
Men's Pants	Straight Leg Fleece: 30/30		500
Men's Pants	Straight Leg Fleece: 33/30		500
Men's Pants	Straight Leg Fleece: 30/32		500
Men's Pants	Straight Leg Fleece: 32/32		500

- 1
- Select the inventory tab to view and manage your quantities for products
- 2
- Tap on the Category tab to toggle between viewing the Category Name and the Item #
- 3
- Tap on the quantity field to update your inventory counts

MENU MANAGEMENT: VARIATIONS

Boot Cut Jeans

Men's Pants

Boot Cut Jeans

Cost\$25.00Price\$75.00

Item #MP100

Barcode #barcode

Back

Variations

1

2

Men's Pant Size

Men's Shirt Size

Women's Pant Size

Cost\$25.00Price\$75.00

Item #MP100

Barcode #barcode

Track Qty.

-

160

+

Select All

3

30/30

33/30

30/32

32/32

Add new option

4

Edit Price & Quantity

Boot Cut Jeans

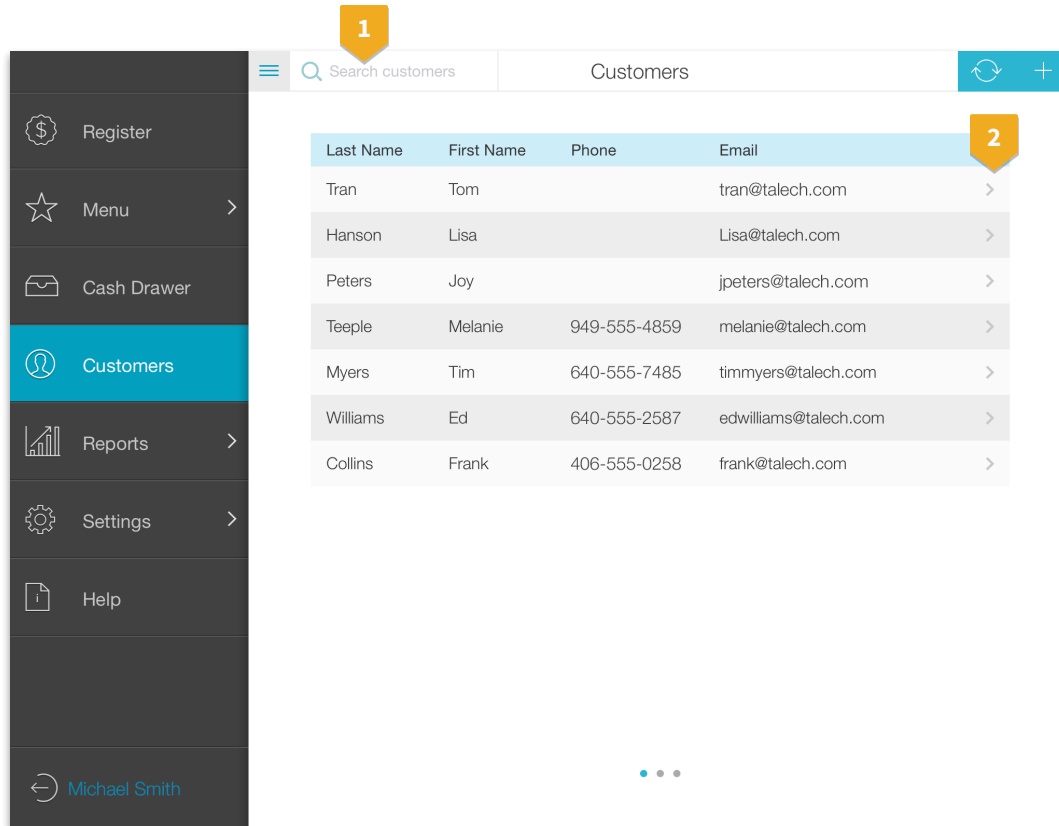
Men's Pants

<input checked="" type="checkbox"/> Options	Cost	Price	Item#	Barcode#	Qty
<input checked="" type="checkbox"/> 30/32 Blue	\$25.00	\$75.00			20
<input checked="" type="checkbox"/> 33/30 Black	\$25.00	\$75.00			20
<input checked="" type="checkbox"/> 32/32 Black	\$25.00	\$75.00			20
<input checked="" type="checkbox"/> 30/30 Blue	\$25.00	\$75.00			20
<input checked="" type="checkbox"/> 30/30 Black	\$25.00	\$75.00		TNHOY1ML	20

Variations allow you to create multiple versions of a single product based on price or quantity differences. This simplifies your top level menu and allows you to group sales by the base product (e.g. color, size)

- 1 To edit an existing variation, tap on the variation name
- 2 To create a new variation, select the add button
- 3 Select the options you want to apply to this product. This is useful if you have a single variation with multiple options but only a subset apply to a product. You can apply multiple variations to a single product (e.g. color, size)
- 4 Tap on the “Edit Price and Quantity” button to edit quantity and price values for each option

CUSTOMERS: SEARCH FOR A CUSTOMER



1 Search for a customer using their first name, last name, e-mail or phone number

2 Tap on the customer to view and edit their information. If you want to add this customer to an order, tap on the user icon again to close the customer panel

CUSTOMERS: LOYALTY PROGRAM

<

Settings

General

Employees

Loyalty

Taxes

Customer Loyalty Program

1

Loyalty Program

2

Loyalty Campaign Name

Visits to Redemption

Redemption Value

VIP Program

5

\$10.00

Melanie Teeple

0

days since last visit

2

total # of visits

\$19.00

average \$ per visit

Melanie

Teeple

melanie@talech.com

M: 6504443333

H: home phone

F: fax number

123 Elm street

apt / suite

Palo Alto

Ca

94306

Map

notes

VIP Program

Every 5 Visits

3

Join

Open

Closed

Receipt	Time	Total
A8KR	Jun 19, 2014 2:43 PM	\$50.10 >
NVVC	Jun 19, 2014 11:09 PM	\$6.60 >

With talech you can create a simple loyalty program based on number of visits

- 1

Go to Loyalty under Settings, and enable the loyalty program
- 2

Enter a program name, minimum number of visits to redemption and the discount offered
- 3

Tap on the “Join” button to enroll a customer in the program. Tap “Redeem” to use the reward amount towards an order

BARCODE SCANNING: SCANNING AN ITEM



Follow the instructions in the hardware set up guide on pairing the barcode scanner with your iPad.

- 1 Press the big button to scan items into your order
- 2 Press the small button twice in quick succession to show/hide the on screen keyboard

*Note: When the iPad is paired with the scanner, your keyboard will not appear automatically until you press the small button twice.

BARCODE SCANNING: ADDING NEW ITEMS

Antique Silver Earrings

Accessories

Antique Silver Earrings

Cost\$15.00Price\$30.00

Item #item #

Barcode #123111345667

Track Qty.

CategoryAccessories

ColorRed

Taxes

Variations

Add-Ons & Exclusions

1 When scanning a new item, a new item dialog will appear with the product barcode number populated in the barcode field. You can enter in the remaining product details such as name and price to add it into inventory.