Uniwell Lynx v10
User Guide

Uniwell Lynx v10 User Guide

Table of Contents

Part 1

Introduction

Introduction

Uniwell Lynx v10 Product Overview

Uniwell Lynx has been developed as a modular software solution with options from simple program management through to multi-location sales analysis and stock control.

Optional Modules

- Stock Control
- Linked Items
- Customers
- Multi-Location

Optional Add-Ons

- ALM Invoices (Australia Only)
- NDP Link
- Ishida Link
- CAS Link
- Automatic Item Sales Export
- Labour Cost Reporting
- Export to Xero

Uniwell Lynx Enterprise v10

Uniwell Lynx Enterprise has the same feature set as Uniwell Lynx. However, rather than using database files (limited to 2GB in size) it uses a database server (PostgreSQL).

Part 2

Installing Uniwell Lynx

Installing Uniwell Lynx

To begin installing your Uniwell Lynx software, review the System Requirements and then follow the Installation Instructions.

System Requirements

To install Uniwell Lynx we recommend the following:

1GHz 32-bit (x86) processor and 512Mb RAM or better
500Mb free hard disk space for program installation
1024 x 768 screen resolution with 16-bit colour or better
USB port for Licence Key (optional)
Windows XP, Windows Vista or Windows 7

Installation Instructions

Installing Uniwell Lynx

Uniwell Lynx software is supplied via Electronic Software Delivery (ESD). Follow the instructions below to install Uniwell Lynx on your PC.

1. Download the Uniwell Lynx installer from the Uniwell Lynx web site and save on your PC (Go to http://uniwelllynx.com/ > Downloads > Uniwell Lynx v10)
2. Log on as an administrator if your computer only allows users with administrator privileges to install programs
3. Save any open documents and close all programs
4. Run the Uniwell Lynx installer
5. Follow the on-screen instructions for installation

Software Licence

Uniwell Lynx software is available with two different types of software licences. The first time you run Uniwell Lynx you will be prompted to choose your Licence Type: Electronic Licence Activation, USB Licence Key or Auto-Detect. The Auto-Detect setting will check to see if a valid USB Licence Key is attached to the PC and if not will use Electronic Licence Activation.

<u>Electronic Licence Activation (ELA)</u>
The first time you run Uniwell Lynx you will be prompted to activate your licence using the Licence ID and Password supplied with the software. Activation can only be done online via the internet. The first time you open or create a data file in Uniwell Lynx you will be prompted to enter the Product ID and Licence Code that was supplied with the software.

<u>USB Licence Key</u>
After installing Uniwell Lynx, the USB Licence key must be attached to a USB port on your computer whenever you use the software. The first time you open or create a data file in Uniwell Lynx you will be prompted to enter the Product ID and Licence Code that was supplied with the software.

Transferring Your Licence to Another PC

<u>Electronic Licence Activation (ELA)</u>
To transfer your ELA Licence to another PC you must first deactivate the licence on your original PC. To do this go to *Windows Start Menu > All Programs > Lynx Software > Uniwell Lynx v10 Deactivate Licence*. After the licence has been deactivated you can then install and activate the software on the new PC.
Note: By default there is a limit of 5 deactivations per licence.

<u>USB Licence Key</u>
To transfer your USB Licence to another PC simply install the software on the new PC then attach your USB Licence Key and re-enter your licence details when prompted.

Upgrading your PC Hardware or Windows Operating System

Electronic Licence Activation (ELA)
Upgrading the hardware or Windows operating system on your PC may invalidate your Electronic Licence. Therefore, BEFORE upgrading your PC you should deactivate your licence. To do this go to *Windows Start Menu > All Programs > Lynx Software > Uniwell Lynx v10 Deactivate Licence*. After your PC has been upgraded you can then re-activate the software on the new PC using the original Licence ID and Password that was supplied with your software.
Note: By default there is a limit of 5 deactivations per licence.

Part 3

Getting Started

Getting Started

Now that you've installed Uniwell Lynx let's get started using the software. This chapter includes some introductory information about starting and using the software.

Starting Uniwell Lynx

When you start Uniwell Lynx the opening window will display the following options:

- **Open** your data file - use this option to open your data file once it has been created.
- **Create** a new data file - see 'Creating a New Data File'.
- **Exit** Uniwell Lynx - close the Uniwell Lynx program.

Navigating in Uniwell Lynx

Uniwell Lynx uses a standard Windows menu to provide access to the various functions within the software. It also has a shortcut bar for accessing the most commonly used features.

Sorting and Filtering Data

Most data grids within Uniwell Lynx include sorting and filtering options. To change sort order click directly on the field name in the grid header. Repeatedly selecting the same sort field will toggle between ascending and descending order. To filter data use the Filter combo box to select the filter field and then enter the filter text in the text box to the right. By default the data filters will show only records where the start of the filter field matches the filter text. For example, if the filter field is Description and the filter text is *Bottle* then only records where the description starts with *Bottle* will be displayed. To show records where the filter text appears anywhere in the filter field use the % wildcard character at the start of the filter text. For example, if the filter field is Description and the filter text is *%Bottle* then all records that include *Bottle* somewhere in the description will be displayed.

Shortcut Keys

The following shortcut keys can be used on most data grids in Uniwell Lynx.

Insert	Open the create item window.
Delete	Delete an item.
Enter	If there are no items in the grid then the Enter key will open the create new item window, otherwise it will open the modify item window for the currently selected item in the grid.
Esc	Exit the data grid.

Selecting Multiple Records

Most data grids within Uniwell Lynx allow selection of multiple records for deletions. Individual records can be added to the selection by holding down the *Ctrl* key while clicking the required record or a range of records can be selected by clicking on the first record and then holding down the *Shift* key while clicking on the last record. Records can also be selected by holding down the *Shift* key and using the *Up Arrow*, *Down Arrow*, *Page Up* and *Page Down* keys.

Help File

Uniwell Lynx includes a help file with information about the various options within the software. The help file can be accessed by pressing the F1 Key or by choosing **Uniwell Lynx Help** from the **Help** menu.

Part 4

Creating Data Files

Creating Data Files

Uniwell Lynx stores your information in a data file. You must create this file before you begin using the software. The first time you create or open a data file after installing the software you will be required to enter your Licence Code.

Creating a New Data File

1 Start Uniwell Lynx and click **Create a new data file** in the opening window.

2 Select the required directory and enter the filename for your new data file in the Save As dialog that appears.

Note: If you are using Uniwell Lynx Enterprise then you will simply specify a name for your database.

3 Log on as Administrator. Leave the password blank.

4 Enter your company details and then click **Ok** to save.

5 Setup your tax rates and then click **Ok** to save.

6 Congratulations! Your new Uniwell Lynx data file has now been created.

Entering Your Licence Code

The first time you create or open a data file after installing the software you will be required to enter your Product ID and Licence Code.

Part 5

Setting Up Your Data File

Setting Up Your Data File

Setting up your data file is an important step in getting your system up and running. The following tables provide important information that will help you to successfully setup your data file. Depending on the Optional Modules including in your software licence and which software features you plan to use some of the points listed may not apply to your situation.

Critical Setup Operations

This table lists some initial setup operations that are critical. Some of these operations must be completed before other software features are used in order for the software to function correctly.

Tax Codes	The tax rates entered in your data file are used to calculate tax amounts. Therefore, it is essential to setup your tax rates correctly before any transactions are entered or any sales data is collected from your POS terminals.
Locations	If you will be using Locations to analyse sales data or track stock levels then you should create your locations before you create your POS terminals.
POS terminals	Your Uniwell POS Terminals are referred to as POS terminals within Uniwell Lynx. When you create your POS terminals you are providing the software with the information it needs in order to communicate with your POS Terminals.
Groups	Each item in your data file will be assigned to a Group. You should consider how you would like your Items grouped and then create your Groups before you create your Items.
Items	Before you start creating your items you should give consideration to the following points: • How you will code your items. This will affect how your items are sorted in grids and on reports. • If you will be using the profit reporting or stock valuation features within Uniwell Lynx then the Last and Average Cost Prices should be entered for all items before any transactions are entered or any sales data is collected from your POS terminals. • If you will be using Linked Items to create items that draw stock from other items then you need to setup the component items first. • It is very important that you setup your Stock Control Items and Linked Items correctly before any transactions are entered or any sales data is collected from your POS terminals. If an item has a stock level or transactional history its type (Stock Control or Linked) cannot be changed and the item cannot be deleted.
Customer Charge Media	If you are using the Customers Module then the Customer Charge Media settings must be setup correctly before any sales data is collected from your POS terminals.
Time Zone 1 Setup	If you will be collecting Hourly Reports then the Time Zone 1 program must be setup correctly in your Uniwell POS Terminals before any sales are entered at the terminals. The Time Zone 1 Setup option in Send Program should be used to do this.

Customizing Uniwell Lynx

While not critical, the following setup operations will help to simplify data entry, reduce data entry errors and facilitate more meaningful reporting.

Price Levels	Enter meaningful descriptions for Price Levels and delete any unused Price Levels.
Programs	The Programs feature allows you to send different sets of PLUs to different POS terminals. Enter meaningful descriptions for the Programs and delete the descriptions of any unused Programs.

Tax Codes

Setup > Tax Codes

In order to send the correct tax settings for items to your POS terminals and to correctly calculate tax amounts when collecting sales you must set up the tax codes in Uniwell Lynx so that they match the tax settings programmed in your Uniwell POS Terminals. For each Tax Code you can enter the following information:

Description	Description of this tax code. (Up to 10 characters)
Rate %	Tax rate %.
Default Setting	This setting is used to make data entry of Items and Groups quicker and easier. Each Tax Code with the Default Setting checkbox ticked will be automatically applied whenever you create a new Item or Group.
Add-On Tax	Specifies that the Add-On tax system should used for calculating tax amounts rather than the VAT tax system. This setting should typically be off for VAT or GST taxes.

Tip*: Leave the description field blank for tax rates that are not used. This will simplify the Item and Group data entry screens as only Tax Codes that have a description will be displayed.*

Customize

Setup > Customize

The following elements within the software can be customized as required.

Programs	For sending different sets of PLUs to different POS terminals. ***Tip****: Delete any unused Programs to simplify data entry of Items.*
Write-off Categories	For categorizing Stock Write-offs.
Item Custom Lists	For custom filtering on Item related reports and listings.
Function Groups	For grouping functions on Transaction reports.
KP File Names	Used to populate KP File drop-down lists when editing items.
Security Level Names	Used to populate Security Level drop-down lists when editing clerks.
Location Names	Used to populate Location drop-down lists when editing clerks.
Destination Names	Used to populate Destination drop-down lists when editing clerks.

Price Levels

Setup > Price Levels

The Price Level descriptions entered will be shown wherever Price Levels are accessed in the software and on reports that feature price levels.

Tip*: Deleting any unused Price Levels will prevent them from being displayed in the software thus simplifying data entry.*

Clerk Programs

Setup > Clerk Programs

The Clerk Programs feature allows different sets of Clerks to be sent to different POS terminals. The Clerk Program descriptions entered will be shown wherever Clerk Programs are accessed in the software.

Item Custom Lists

Setup > Item Custom Lists

Item Custom Lists can be used for filtering item related reports and listings. Up to 99 entries can be added to each list. Each custom list can be given a meaningful description via **Setup > Customize > Item Custom Lists**.

As an example, Item Custom Lists could be used for filtering different Wines on sales reports. One of the Item Custom Lists could be used for the Year of the wine and entries added to the list for each valid year.

Preferences

Setup > Preferences

The following settings can be configured as required.

Important: *The settings highlighted in red are critical to the operation of your software. Usually these settings will be configured by your Uniwell Lynx Dealer and should not be changed.*

Backup/Programs	
Default folder for backup files	The default folder where backup files will be stored.
Prompt for data backup on exit	Prompt the user to do a data backup when they exit the software.
Automatic data backup after scheduled communication jobs	Automatically perform a data backup whenever a scheduled jobs is completed. Automatic backup files are saved in the default folder for backup files and have the date included in the filename.
Include PRG Files	Include PRG files in automatic backup.
Export files automatically to DataSmart	Exports sales data collected from your POS Terminals to the specified folder so that the data can be uploaded to DataSmart.
> DataSmart folder	The folder used for automatic exports to DataSmart.
> Extract X90 Days	Sets which days of the week that the program data from your POS Terminals should be extracted and included with the files automatically exported to DataSmart.
Communications	
Scheduled Job retries	The number of times that scheduled jobs will be retried if there is a communications failure.
FTP Logon Delay in Milliseconds	Sets the logon delay for FTP communications.
FTP Clear Sales Delay in Milliseconds	Sets the clear sales delay for FTP communications.
Journal Data Transfer Port Number	Sets the Port Number used for journal data streaming. This setting is used by the Journal Monitor feature.
PLU 2nd Name Language Code	Sets the PLU 2nd Name Language Code when sending PLU data. (zh = Chinese, ar = Arabic)
Default the sales date to previous day if collecting before	If a Collect Sales is done before the specified time then the Sales Date will automatically default to the previous day. This setting is used to help ensure that sales are processed to the correct day when they are collected the day after the sales occurred.

Update all Group and Item Descriptions when Extracting Program	By default only the POS Description field is updated for existing Groups and Items during an Extract Program thus preserving the Description field which is only used internally in Uniwell Lynx. This setting forces the Description field to also be updated for existing Groups and Items during an Extract Program.
Extract X Reports before Z Reports during Collect Sales	Extracts X Reports before Z Reports during Collect Sales to minimize the possibility of data loss due to communication failures while extracting Z Reports. Collect Sales will take longer if this setting is enabled.
Extract X Reports ONLY during Collect Sales	Extracts X Reports during Collect Sales but does not extract Z Reports. Sales data must be manually cleared at the POS Terminals if using this setting otherwise sales data will be duplicated.
Automatically close scheduled job results form	Whenever a scheduled job completes a form is displayed showing the results. The results form is closed automatically when this setting is enabled.
Automatically cancel overdue scheduled jobs	Scheduled Jobs can only be executed when the software is running and no modal* forms are displayed. By default when the software is started or any modal forms are closed any scheduled jobs that are overdue will be executed. Overdue scheduled jobs will be automatically canceled if this setting is enabled. *Modal forms are forms that have exclusive focus and must be closed before any other features in the software can be used.
Use PLU Sales Individual POS report	Extracts the PLU Sales Individual POS report from POS Terminals during Collect Sales instead of the PLU Sales report. This setting is for use with IRC systems where sales are floated between terminals. The PLU Sales Individual POS report includes PLU sales that were actually entered at the terminal whereas the PLU Sale report includes PLU sales that were finalized at the terminal. ***Important**: This setting should only be used with AX-3000 V2.70 or later. If this setting is enabled then the **Use Updated EJF report** setting will also be enabled automatically.*
Use Updated EJF report	Extracts the Updated EJF report from POS Terminals during Collect Sales instead of the EJF report. When this option is used EJF memory in the AX-3000 is not reset. This is required when using the PLU Sales Individual POS report to prevent loss of sales data when collecting sales from terminals in an IRC system. ***Important**: This setting should only be used with AX-3000 V2.70 or later. When using this option the EJF memory in the POS terminals must be cleared from time to time to prevent "EJF memory full" condition.*
Automatically extract new items during Collect Sales	Extracts program data before sales data during Collect Sales and then adds any new items into the Uniwell Lynx data file before processing the sales data. This setting is intended for use where new items are added manually at POS Terminals or sent to the terminals from another software package or data file. Collect Sales will take longer if this setting is used. ***Note**: This option only applies when sales are collected directly from POS terminals or when collecting sales data from an FTP server.*
Automatically extract all program during Collect Sales	Extracts all program instead of just adding new items when using the **Automatically extract new items during Collect**

	Sales setting. This setting is intended for use where prices updates or other program changes are made manually at POS Terminals or sent to the terminals from another software package or data file. ***Note**: This option only applies when sales are collected directly from POS terminals or when collecting sales data from an FTP server.*
Hide Collect Sales Options box	Hides the Options box on the Collect Sales screen to prevent the Sales Date or Process Sales Batches settings from being altered.
Process Sales Batches if Collect Sales Options box hidden	Forces the Process Sales Batches setting on if the Collect Sales Options box is hidden.
Extract customer name in reverse order (Last Name + First Name)	By default when customer program data is extracted from POS terminals the Customer Name field that is used on reports in Uniwell Lynx is set to First Name + Last Name. This option reverses the order when extracting program data so that the Customer Name field is set to Last Name + First Name.
Upload collected sales data to FTP Server	Uploads sales data collected from POS Terminals to the specified FTP Server. The files are uploaded using the same filename convention as used by the Uniwell Report Push-Up feature. This option is intended for use where sales reports need to be collected both locally and by a head office.
> FTP Server	The FTP Server used for the sales data upload.
> Username	The username required to login to the FTP Server.
> Password	The password required to login to the FTP Server.
Copy collected sales data to File Folder	Copies sales data collected from POS Terminals to the specified File Folder. The files are saved using the same filename convention as used by the Uniwell Report Push-Up feature. This option is intended for use where sales reports need to be collected both locally and by a head office. It allows the sales data to be forwarded to the head office using a cloud-based file folder rather than an FTP Server.
> File Folder	The File Folder used to save sales data.
> Use sub-folders for Locations and POS terminals	Uses sub-folders based on location and POS terminal when copying sales data collected from POS Terminals to a File Folder. Sub-folder structure: [File Folder]\[Location description]\[POS terminal code]
Theme	
Color Scheme	Sets the color scheme for the user interface.
Hide Shortcut Bar	Hides the shortcut bar that is displayed on the left side of the user interface.
Hide fixed description column in Item Selling Prices grid	The Item Selling Prices grid includes a description column that does not disappear when scrolling horizontally. This setting hides the fixed description column.
Hide barcodes when editing items	Hides the barcodes grid when editing items.
Other	
Report font size	Sets the font size used on reports and listings. This setting can be used when fields on reports overflow due to large numbers or regional settings.

Decimal places in quantities	Sets the number of decimal places used when displaying quantities in the software. If the 'floating' option is selected then quantities will be displayed up to four decimal places without trailing zeros.
Default cost price for Purchase Orders	Sets the default cost price used for items on purchase orders to either Last Cost or Standard Cost. Last Cost is updated whenever a Stock Purchase is entered. Standard Cost can be edited via **Data > Items**.
Customer Charge Media # 1 **Customer Charge Media # 2**	Sets the media that is used for charging customers sales to account at your POS Terminals. ***Important****: This setting must be set correctly before collecting sales data from your POS Terminals.*
Default Sort PLU	Sets the default value for the Sort PLU field when creating new items.
Purchase Order Number Prefix	Sets a prefix that will be added when generating the next purchase order number.
Purchase Order Email Message	Sets the message that will be included when emailing purchase orders.
Default Purchase Order 'Deliver Via'	Sets the default Deliver Via field when creating purchase orders.
SMTP Mail Server	The SMTP mail server that will be used to send emails. *Hint: You can test your email setup by clicking the **Send Test Email** button. If the test fails an email log will be displayed to help you diagnose any issues.*
> SMTP Username	The username required to login to the SMTP mail server.
> SMTP Password	The password required to login to the SMTP mail server.
> SMTP Port	The SMTP port setting required by the SMTP mail server.
> SMTP SSL	The SMTP SSL setting required by the SMTP mail server.
> SMTP StartTLS	The SMTP StartTLS setting required by the SMTP mail server.
Include 'Tax Invoice' on Customer Statements	Includes the text 'Tax Invoice' on Customer Statements.
Use PLU 2nd Name as default PLU Caption for Screen Layout	Use the PLU 2nd Name instead of POS Description as the default caption on PLU buttons in Screen Layout programming.
Enable Adjust All Purchase Lines option in Stock Purchases	Enables an option to adjust all lines in a Stock Purchase by a discount percentage.
Use BHT Protocol for Denso Portable Data Terminals	Use the BHT Protocol instead of the BHT-Ir Protocol for communications with Denso portable data terminals.
Do not show prices on Purchase Orders	Inhibits cost prices from being shown on Purchase Orders.
Limit item search to supplier items in Stock Purchases and Purchase Orders	When this option is turned on the item search feature in Stock Purchases and Purchase Orders will only show items that have supplier item codes for the selected supplier.
Do not allow Stock Purchases to be modified or deleted	Prevents Stock Purchases from being modified or deleted.
Use Last Cost for cost of sales when processing sales data	Use last cost instead of average cost for cost of sales when processing sales data.

Users

Setup > Users

By setting up users you can restrict access to the software. You can create User IDs and Passwords for authorized personnel and set their access permissions. Access permissions determine which menu options within the software will be visible when a user is logged in. For some menu options you can also set Modify and Delete permissions.

Note: *The 'Administrator' user cannot be deleted. You can however change the administrator password.*

Setup > Change Password

By granting users access to the **Change Password** option in the **Setup** menu and denying them access to the **Users** option, you can allow users to modify their own passwords without giving them access to their permissions or those of other users.

Sales > Manager Reports

The User Log report provides details of critical operations that have been performed by users.

Email Addresses

Setup > Email Addresses

Create and maintain email addresses for use when emailing reports or listings.

Cloud Drives

Setup > Cloud Drives

Create and maintain cloud drives for use as a destination for reports or listings.

Locations

Data > Locations

The Multi-Location Module includes support for stock control and sales analysis across multiple locations. Each location is assigned a code (1-999) and a description. Price Level Times, Menu Level Times and Timed Links can be programmed by Location. If entered the Delivery Details will be used as the default when creating Purchase Orders for the Location.

POS Terminals

Data > POS terminals

Uniwell Lynx supports a range of Uniwell POS Terminals. These are referred to as POS terminals within the software. The settings that can be configured are listed below. Some settings only apply to specific POS Terminal Types and Configurations. You may need the assistance of your authorized Uniwell POS dealer to correctly configure your POS terminals.

Warning*: Incorrect configuration of your POS Terminals and/or the POS terminal setup in Uniwell Lynx may result in data loss or other errors during communications.*

<table>
<tr><td>Code</td><td>A unique code to identify this POS terminal. (1-999)</td></tr>
<tr><td>Description</td><td>Description of this POS terminal. (Up to 30 characters)</td></tr>
<tr><td>Location</td><td>Location for stock control and sales analysis.</td></tr>
<tr><td>Model/Firmware</td><td>The model number and firmware version of the POS terminal.</td></tr>
<tr><td>Connection</td><td><table><tr><td>None</td><td>This setting can be used to temporarily disable communications to this POS terminal.</td></tr></table></td></tr>
</table>

	FTP — FTP protocol via network.
IP Address	IP Address for FTP communications.
PASV Mode	Set Passive Mode for FTP communications. This setting may be required for some network/firewall configurations.
Port Number	The Port Number used for FTP communications.
Collect sales from REPORT_BAKUP	Use this setting to collect sales from the REPORT_BACKUP folder on the USB drive attached to the POS Terminal. ***Important****: The* ***Report backup file is saved in a date folder*** *setting in Program > System > System Option > FTP must be disabled*
FTP Server (checkbox)	Use this setting if your POS terminals have been configured to upload reports to an FTP server (Report Push Up). When this setting is activated the software will download sales data from the specified FTP server instead of collecting the sales directly from the terminals.
> FTP Server	The IP Address or URL of the FTP Server.
Username	The username required to access either a POS terminal or an FTP Server.
Password	The password required to access either a POS terminal or an FTP Server.
File Folder (checkbox)	Use this setting if you are collecting sales data from a file folder. This feature is only for use when another Uniwell Lynx package has been configured to forward sales data via a File Folder.
> File Folder	The File Folder where the sales data is stored.
Branch Number	The Branch Number of the terminal.
POS Number	The POS Number of the terminal.
Program	This setting is used to specify which PLUs to send to the terminal. Only the PLUs in the selected Program will be sent.
Clerks	This setting is used to specify which Clerk Program to send to terminal. Only the Clerks in the selected Clerk Program will be sent.
PRG File	PRG file for use with POS terminals.
Time Zone	When sending date/time to the POS terminal it will be adjusted according to the selected time zone. If your POS terminal is in the same time zone as your PC then this setting should be set to 'System Default'. ***Important****: If a setting other than 'System Default' is used then Uniwell Lynx must be run as administrator.*
Send Program Selection	These selections can be used to restrict the program data sent to the POS terminal. The **Disable Scalable Item flag** can be used if you have a mix of terminals with or without scales. Set this option for the terminals that do not have scales attached.
Collect Sales Options	Collected sales can be extracted from Level 1 (X1/Z1), Level 2 (X2/Z2) or disabled. The 'General' setting applies to transaction and group sales data. ***Important****: The EJnl setting must be enabled if you want to collect customer transaction data from your terminal.*
Read Sales Options	Read sales can be extracted from Level 1 (X1), Level 2 (X2) or disabled. The 'General' setting applies to transaction and group sales data.
Price Levels	Select the price levels within Uniwell Lynx that you want to send to the price levels in your terminal.

Setup Instructions

Uniwell POS terminals must be configured correctly for use with Uniwell Lynx. The recommended settings for a terminal can be viewed by clicking the **Setup Instructions** button.

Groups

Data > Groups

Groups are an integral part of the programming in your POS terminals. All items (PLUs and barcodes) are linked to groups. With Uniwell Lynx you can create and maintain the group program that is sent to your POS terminals. Although it is possible to program your groups directly at your POS terminals, it is recommended that you do all group programming in Uniwell Lynx to avoid any conflicts. When adding or modifying groups you will have access to a range of programming options. The exact options applicable may vary for different models of Uniwell POS Terminals. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Descriptions

There are two descriptions associated with each Group. The POS Description is the one that will be sent to your POS terminals. The main Description is only used within the software and will appear on reports and listings.

Items

Data > Items

Items are the products or services that you sell or stock. In most cases the items you create will also be sent to your POS terminals as PLUs or Barcodes. However, you can also create items that are only used within the software. Although it is possible to program your items directly at your POS terminals, it is recommended that you do all item programming in Uniwell Lynx to avoid any conflicts. When adding or modifying items you will have access to a range of programming options. Some of these options are for the PLU/Barcode program that will be sent to your POS terminals. Other options are for internal use within the software. The exact options applicable may vary for different models of Uniwell POS Terminals. For further information about the options that are specific to the PLU/Barcode program in your POS terminals you should consult the Instruction Manual supplied with your Uniwell POS terminal. The following table provides details about the options that are used internally within the software and other key fields.

Description	The main Description is only used within the software and will appear on reports and listings. ***Note**: The POS Description is the one that will be sent to your POS terminals.*
General	
Standard Cost	This is a reference or list cost and is not affected by entering stock purchases. ***Important**: The Standard Cost should be entered exclusive of tax.*
Last Cost	The last cost is updated whenever a new stock purchase for the item is entered. ***Important**: The Last Cost should be entered exclusive of tax.*
Average Cost	The average cost is recalculated whenever a new stock purchase for the item is entered. The average cost is used for profit calculations when processing sales data. ***Important**: The Average Cost should be entered exclusive of tax.*
Price Group	This is a free text field that can be used to label products that are related to each other and sold for the same price. When entering price updates the Price Group filter can be used to locate all items within the same price group making easy to update the price for all of the items at the same time. (See the section 'Modifying Multiple Items' below)
Inactive Item	Inactive Items are excluded when sending program data to POS terminals and from item search windows. ***Note**: This setting will not change the status of an item that cannot be deleted because it has a stock level or transactional history.*
Stock Control	Select this setting to track stock levels for this item. ***Important**: If an item has been set for stock control and has a stock level or transactional history it cannot be changed to a non-stock control item or a linked item and it cannot be deleted.*
Linked Item	This setting is used for items that will draw stock from other items. A Linked Item can be a fraction or multiple of another item or it can be made up of multiple components. After setting the Linked Item checkbox on an item you should then go to the 'Item Links' tab to enter the component list. ***Note**: An item that is used as a component for one or more Linked Items cannot also be set as a Linked Item.* ***Important**: If an item has been set as a Linked Item and has transactional history it cannot be changed to a stock control or non-stock control item and it cannot be deleted.*
Reorder Level	This field only applies to Stock Control items and is used for the Reorder Report and the Reorder option in Purchase Orders. If the item's stock level is less than the reorder level then the item will be included on the Reorder Report or when using the Reorder option in Purchase Orders.
Recommended Level	This field only applies to Stock Control items and is the recommended stock

	level for this item. The difference between the actual stock level and the recommended stock level is used as the reorder quantity on the Reorder Report or when using the Reorder option in Purchase Orders.
Reorder Pack Size	This field only applies to Stock Control items and specifies the pack size when reordering items. When calculating the reorder quantity it will be rounded up to the next multiple of the reorder pack size.
Other	
Default Number of Labels	The number of labels to be added to Export Items for Label Printing when this item is highlighted in the Items grid and the **Add to Labels Export** button is clicked.
Number of Labels when Purchased	The number of labels to be added to Export Items for Label Printing when a stock purchase for this item is entered. (None/Default/Purchase Quantity)
Item Size	There are two parts to this field, a quantity and the units. For example, if the product is a 750ml bottle then enter '750' in the first part and 'ml' in the second part. This field is include when Exporting Items for Label Printing.
Price per unit factor	This field is used to calculate the Price Per Unit fields that are included when Exporting Items for Label Printing. For example, if the product is a 750ml bottle that has a Sell Price 1 of $30.00 and the price per unit factor is 100 then the Price Per Unit 1 field included in the Export Items for Label Printing will be '$4.00 per 100ml'.
Price per Unit Item	This setting is used for items that are sold by weight or volume where the sales quantity returned from the POS terminals indicates the number of packages rather than the actual weight or volume. When this setting is activated the sales quantity will be recalculated based on the sales amount and the sell price. ***Warning****: Incorrect usage of this setting will result in incorrect sales quantities and stock levels.*
Suppliers	
Primary Supplier	The primary supplier for this product. This field is used when grouping or filtering item related reports by supplier. When using the Reorder option in Purchase Orders this item will only be included if the selected supplier for the Purchase Order is the Primary Supplier for this item.
Supplier Item Codes	Up to 5 Supplier Item Codes can be entered for an an item. A different description can be entered for the supplier's item such as when your item refers to an individual item but the supplier's item refers to a carton of such items. The Units field is used to specify how many of your items are included in the supplier's items. For example, if your item is a 750ml bottle and the supplier's item is a carton of 12 bottles then you would enter '12' in the units field.
Item Links	
Item Links Grid	This is the component breakdown of a Linked Item. When you sell the Linked Item stock will be drawn from each of the component items based on the quantity specified. Quantities can be entered as whole numbers, decimals or as simple fractions. For example, if the Linked Item is a bottle that draws stock from a carton of 12 bottles you can enter the quantity as '1/12' rather than as a decimal thus making the quantity easier to understand and reducing the chance of entry errors.
Custom	

Custom List 1 to 9	Custom Lists can be used for filtering item related reports and listings. For each Custom List you can select the entry that applies to this item. For example, if you were to use Item Custom Lists for filtering different Wines then one of the lists could be used for the Year. After setting up the various Years in the Custom List (**Setup > Item Custom Lists**) you could then choose the appropriate Year for each of your wine items.
Notes	This is a free text field that can be used to record any notes about the item.
Loyalty	
Loyalty Point	This field corresponds to the Loyalty Point program option for PLUs.

Deleting Items

To delete one or more items select the item/s in the grid and then click the **Delete** button. To protect the integrity of your data, items that have transactional history or stock levels cannot be deleted. Items that cannot be deleted but are no longer sold or stocked can be handled as follows:

- Modify the item and tick the 'Inactive Item' checkbox on the **General** tab. (See **Inactive Item** in the above table)
- Any PLU Codes or Barcodes associated with the item can be deleted and reused if required.
- The Item Code can be edited so that it is sorted in the grid with other inactive items and easily recognizable as an inactive item by adding an alpha prefix to the item code.
- If the item is a stock control item then do a partial stocktake to set its stock level to zero in each Location. This will enable you to delete the item at some future time after all its transactional history has been removed by Archiving data.

Modifying Multiple Items

By using the multi-select feature of the Items data grid you can modify selected fields for a range of records rather than having to edit the records individually. For example, you could change the group link and tax settings for a selected range of records. To use this feature, select the required records and then click the **Modify** button. Use the *Enter* key to toggle the fields that will be updated in the selected records. When you select a field to be updated it will be highlighted with a different background color. Only the highlighted fields will be updated. When you have selected and entered data in the fields to be updated click **Ok** to update. A prompt will be displayed advising how many records will be affected and requesting confirmation before proceeding.

Item Enquiry

The Item Enquiry screen provides an overview of sales and purchase history as well as current stock levels, valuation and quantity on order.

Copying Items

The **Copy** button below the Items grid can be used to copy an item.
Note*: PLU codes, Barcodes and Item Links are not included in the copied item.*

Add to Labels Export

Select one or more items in the grid then click this button to add the items to Export Items for Label Printing. The quantity of labels added is based on the **Default Number of Labels** setting for each item.

Add Range

This feature can be used to create new items with PLU numbers en masse. Click **Add Range** and then enter the Start and End PLU Codes.
Note*: This feature will not overwrite existing items.*

Items by Location

Data > Items by Location

When using the Multi-Location module you can enable or disable items by location. Choose the Location, select one or more items in the grid and then click either the **Enable** or **Disable** button. Only the items that are enabled in a location will be included when sending program data to the POS terminals within that location. By default new items are enabled in all locations.

Item Selling Prices

Data > Item Selling Prices

Item selling prices can be edited directly in a data grid allowing fast data entry of price changes. The Description, Group, Price Group, Average Cost, Last Cost and Tax Settings can also be edited. Use the arrow keys to navigate the grid and edit the highlighted field as required. To select which sell prices you want displayed in the grid click the **Select Columns** button.

Reorder Levels

Data > Reorder Levels

Reorder can be edited directly in a data grid allowing fast data entry of changes. Use the arrow keys to navigate the grid and edit the highlighted field as required.

Item Profit Margins

Data > Item Profit Margins

The Item Profit Margins feature can be used to check profit margins and adjust selling prices. Sell prices can be edited directly in the grid or you can click **Modify** to edit the selected item. The following options are available:

Base price for calculation	Choose the cost price that is used to calculate the profit margin or mark-up. (Standard/Last/Average)
Calculation method	**Margin %** is the profit amount as a percentage of the sell price whereas **Mark-up %** is the profit amount as a percentage of the selected cost price. Both calculations are done exclusive of tax.
Price Level	The sell price that is displayed in the grid.

Calculate Selling Prices

Data > Calculate Selling Prices

The Calculate Selling Prices feature can be used to set selling prices by calculation for a range of items. To use this feature follow the steps below:

1 Use the **Filter** option to select the required items in the grid.
__Note__: The calculation will be applied to all items that are included in the grid.
2 Set the calculation options as required. (See details below)
3 Click **Calculate** to populate the New Sell Price column in the grid with the calculated sell prices.
4 Calculated sell prices can be edited directly in the grid if required. If you do not want the sell price for an item to be updated then delete the calculated price from the New Sell Price column so that it is blank.
5 Click **Update Prices** to update the current sell prices with the calculated sell prices or click **Clear New Prices** to clear the calculated sell prices from the grid.

Calculation Options

<table>
<tr><td>Base price for calculation</td><td>Choose the base price for the calculation. You can select the Standard, Last or Average Cost Price or one of your Sell Prices.</td></tr>
<tr><td>Calculation method</td><td><table>
<tr><td>Profit Margin %</td><td>The profit amount is calculated as a percentage of the sell price</td></tr>
<tr><td>Mark-up %</td><td>The sell price is calculated by adding the specified percentage to the selected base price</td></tr>
</table></td></tr>
</table>

<table>
<tr><td></td><td><table>
<tr><td>Mark-down %</td><td>The sell price is calculated by subtracting the specified percentage from the selected base price</td></tr>
<tr><td>Mark-up Amount</td><td>The sell price is calculated by adding the specified amount to the selected base price</td></tr>
<tr><td>Mark-down Amount</td><td>The sell price is calculated by subtracting the specified amount from the selected base price</td></tr>
</table>
All of the above calculations are done exclusive of tax.</td></tr>
<tr><td>Percentage/Amount</td><td>The percentage or amount used for the calculation.</td></tr>
<tr><td>Sell price to update</td><td>The sell price that will be calculated and updated.</td></tr>
<tr><td>Rounding method</td><td>The rounding method will be applied after any tax has been added to the calculated sell price. (None/Up/Down)</td></tr>
<tr><td>Round to nearest</td><td>If Up or Down has been selected for the rounding method then the calculated sell price will be rounded to the nearest multiple of this field.</td></tr>
<tr><td>Post-rounding adjustment</td><td>The specified adjustment, either positive or negative, will be applied after rounding.</td></tr>
</table>

Promotional Pricing

Data > Promotional Pricing

Promotional Pricing provides a way to manage price changes during sales promotions. When adding or modifying promotions you can specify the date range for the promotion, the days of the week that the promotion is active and the applicable price level*. A grid is provided for entering the items included in the promotion and setting the promotional prices. Normal prices for the selected price level are displayed in the grid for comparison.

**To setup promotional pricing for multiple price levels a separate promotion should be created for each price level.*

Sending Promotional Pricing to POS terminals

Promotional prices are handled automatically based on their start and end dates and the specified days of the week whenever a Send Program is executed. While sending the item program to your POS terminals the software checks each item to see if any promotional pricing is active for that item on the date that the Send Program is being performed and then sends either the promotional price or the normal price accordingly.

***Important**: In order to ensure that the correct prices are programmed into your POS terminals you must do a Send Program before trading starts every day that the prices need to change (either from normal to promotional pricing or from promotional pricing back to normal pricing). The easiest way to ensure that the pricing in your POS terminals is always up-to-date is to schedule a Send Program of PLUs and Barcodes to occur every day before trading starts.*

Clerks

Data > Clerks

Your Clerk program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When adding or modifying clerks you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal. If you have multiple Clerk Programs in your data file then you will be able to select which Clerk Program is displayed in the Clerks grid.

Modifying Multiple Clerks

By using the multi-select feature of the Clerks data grid you can modify selected fields for a range of records rather than having to edit the records individually. To use this feature, select the required records and then click the **Modify** button. Use the *Enter* key to toggle the fields that will be updated in the selected records. When you select a field to be updated it will be highlighted with a different background color. Only the highlighted fields will be updated. When you have selected and entered data in the fields to be updated click **Ok** to update. A prompt will be displayed advising how many records will be affected and requesting confirmation before proceeding.

Function Texts

Data > Function Texts

Function Texts are used within Uniwell Lynx to label various functions on reports. The various function texts available are organized in Function Groups. Use the Group drop-down filter above the grid to display all functions texts or just those within a particular group. When modifying function texts you can edit the text that will be displayed on reports and choose whether or not quantities and amounts should be included on reports for each function.

Categories

Data > PLU Related > Categories

Edit your Category descriptions as required directly in the grid. For further information on Categories you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Modifiers

Data > PLU Related > Modifiers

Your Modifiers program can be maintained in Uniwell Lynx and sent to your POS terminals as required. For further information on Modifiers you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Condiment Groups

Data > PLU Related > Condiment Groups

Your Condiment Group program can be maintained in Uniwell Lynx and sent to your POS terminals as required. For further information on Condiment Groups you should consult the Instruction Manual supplied with your Uniwell POS terminal. If you have multiple Programs in your data file then you will be able to select which Program is displayed in the Condiment Groups grid.

Adding PLUs/Barcodes to a Condiment Group

When the **Add PLU** button is clicked a **Select PLU** screen will be displayed that will allow you to choose one or more PLUs to add to the Condiment Group. The same applies to adding Barcodes. The **Blank Line** button can be used to insert a blank line and the **Move Up** and **Move Down** buttons can be used to change the order of items.

Link PLU Groups

Data > PLU Related > Link PLU Groups

Your Link PLU Group program can be maintained in Uniwell Lynx and sent to your POS terminals as required. For further information on Link PLU Groups you should consult the Instruction Manual supplied with your Uniwell POS terminal. If you have multiple Programs in your data file then you will be able to select which Program is displayed in the Link PLU Groups grid.

Adding PLUs/Barcodes to a Link PLU Group

When the **Add PLU** button is clicked a **Select PLU** screen will be displayed that will allow you to choose one or more PLUs to add to the Link PLU Group. The same applies to adding Barcodes. The **Blank Line** button can be used to insert a blank line and the **Move Up** and **Move Down** buttons can be used to change the order of items.

Bucket Groups

Data > PLU Related > Bucket Groups

Your Bucket Group program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When adding or modifying Bucket Groups you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Meal Deals

Data > PLU Related > Meal Deals

Your Meal Deal program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When adding or modifying Meal Deals you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Upsell Messages

Data > PLU Related > Upsell Messages

Edit your Upsell Message descriptions as required directly in the grid. For further information on Upsell Messages you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Mix and Match

Data > PLU Related > Mix and Match

Your Mix and Match program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When adding or modifying Mix and Match tables you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Sort PLUs

Data > PLU Related > Sort PLUs

Your Sort PLU program can be maintained in Uniwell Lynx and sent to your POS terminals as required. For further information on Sort PLUs you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Set Menus

Data > PLU Related > Set Menus

Your Set Menu program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When adding or modifying Set Menus you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal. If you have multiple Programs in your data file then you will be able to select which Program is displayed in the Set Menus grid.

Adding PLUs/Barcodes to a Set Menu

Use the **Course** buttons to select the course to be displayed and edited. When the **Add PLU** button is clicked a **Select PLU** screen will be displayed that will allow you to choose one or more PLUs to add to the select Course in the Set Menu. The same applies to adding Barcodes. The **Blank Line** button can be used to insert a blank line and the **Move Up** and **Move Down** buttons can be used to change the order of items.

Cooking Instructions

Data > PLU Related > Cooking Instructions

Edit your Cooking Instruction descriptions as required directly in the grid. For further information on Cooking Instructions you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Cooking Instruction Groups

Data > PLU Related > Cooking Instruction Groups

Your Cooking Instruction Group program can be maintained in Uniwell Lynx and sent to your POS terminals as required. For further information on Cooking Instruction Groups you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Menu Levels

Data > PLU Related > Menu Levels

Your Menu Levels program can be maintained in Uniwell Lynx and sent to your POS terminals as required. For further information on Menu Levels you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Discount

Data > Rate/Amount > Discount

Your Discount program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When modifying Discount you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Percentage

Data > Rate/Amount > Percentage

Your Percentage program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When modifying Percentages you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Adjustment

Data > Rate/Amount > Adjustment

Your Adjustment program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When modifying Adjustments you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Tip

Data > Rate/Amount > Tip

Your Tip program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When modifying Tips you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Discount Coupon

Data > Rate/Amount > Discount Coupon

Your Discount Coupon program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When modifying Discount Coupons you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Media

Data > Payment > Media

Your Media program can be maintained in Uniwell Lynx and sent to your POS terminals as required. When modifying Media you will have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Paid Out

Data > Payment > Paid Out

Your Paid Out program can be maintained in Uniwell Lynx and sent to your POS terminals as required. For further information on Paid Outs you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Screen Layouts

Data > Screen Layouts

Uniwell Lynx includes an editor for screen layouts. Before a screen layout can be edited the PRG file must be extracted from the POS terminal via **Communications** > **Extract Program**. The following table provides details of the various operations that can be performed while editing screen layouts:

Navigating the Screen Layout	Double-click on any PLU Page Group, PLU Page or Function Page button to navigate to that page or page group. Menu Level 1 to 5 pages can be accessed via the drop-down list above the screen layout.
Selecting Buttons	Click the **Select Buttons** option below the layout grid if it is not already selected. Click a button in the grid and drag to select multiple buttons.
Moving Buttons	Click the **Move Buttons** option below the layout grid if it is not already selected. Drag and drop buttons to move them.
Adding Buttons	Drag and drop a selection from the list on the left to a blank button in the layout grid.
Deleting Buttons	Select the button/s to be deleted and then click **Delete** or press the Delete key on your keyboard.
Font Size	Select the button/s then choose an option from the **Font Size** drop-down list.
Text Alignment	Select the button/s then choose an option from the **Align** drop-down list.
Colors	Select the button/s then choose then click **Color** to select the foreground/ background colors.
Caption	Select the button then edit the **Caption** field.
Size	Select the button then choose an option from the **Size** drop-down list.
Image	Select the button then choose then click **Image** to select an image and set the image alignment. ***Note**: To load image files, open the Image Selection dialog and then click on **Import Image Files**. The files can be either IMG or BMP files. BMP or bitmap files are Windows compatible and can be displayed in the Image Selection dialog and the screen layout. IMG files however are in a format unique to Uniwell POS*

	terminals and cannot be displayed as they are not Windows compatible. Even though IMG files cannot be displayed you can still select the image by its number.
Subject	Select the button then choose an option from the **Subject** drop-down list. This option is only available for applicable functions.
Area Layout	Click the **Area Layout** button then choose the required area layout and area usages.
Area Size	Click the **Area Size** button then set the area sizes as required. To change the size of an area, click to select the area and then use the + and - keys to increase or decrease the size of the selected area.
Update PLU Captions	Click **Update PLU Captions** to update all PLU captions in the screen layout. By default the PLU Captions will all be replaced with the POS Description from each item. Note: There is an option in **Setup > Preferences > Other** that can be set so that KP text will be used to update the PLU captions instead of POS Description.
Copy PLU Page	Click the **Copy PLU Page** button and then choose the source and destination PLU Pages. All buttons on the source PLU page will be copied to the destination PLU page.
Group PLU/Sort PLU	When a Group PLU or Sort PLU button is selected on a Function Page a **Group PLU** or **Sort PLU** command button will be displayed to the right of the **Copy PLU Page** button. Click on the **Group PLU** or **Sort PLU** command button to set the properties for PLUs displayed when the Group PLU or Sort PLU button is used. You can also double-click on a Group PLU or Sort PLU button to open the dialog.

Saving Changes to the Screen Layout

Click **Ok** to save changes. Click **Cancel** to abandon all changes.

Tare Table

Data > Tare Table

Your Tare Table program can be maintained in Uniwell Lynx and sent to your POS terminals as required. For further information on Tare Table settings you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Suppliers

Data > Suppliers

When adding or modifying suppliers you will be able to enter their name, address and contact details. Suppliers must be created if you want to enter stock purchases or purchase orders.

Customer Groups

Data > Customer Groups

Customer Groups can be used to organize your Customers. With Uniwell Lynx you can create and maintain the Customer Group program that is sent to your POS terminals. For further information on Customer Groups you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Customers

Data > Customers

When adding or modifying customers you will be able to enter their name, address and contact details. You will also have access to a range of programming options. For further information on these options you should consult the Instruction Manual supplied with your Uniwell POS terminal. The following table provides details about some of the key fields.

Name	This name field is only used internally within the software and will appear on customer reports.
Location	Sets the Location where customer can be used. By default new customers are available in all locations.
Last Name/First Name	These are the name fields that are sent to your POS terminals.
Points Balance	The loyalty points balance for customers. The points balance is updated during Collect Sales. ***Note****: A customer's points balance can be edited however to send the updated points balance to your POS terminals you must do a Send Program of Customers and select the 'Send Customer Points Balances' option.*
Notes	This is a free text field that can be used to record any notes about the customer.

Modifying Multiple Customers

By using the multi-select feature of the Customers data grid you can modify selected fields for a range of records rather than having to edit the records individually. To use this feature, select the required records and then click the **Modify** button. Use the *Enter* key to toggle the fields that will be updated in the selected records. When you select a field to be updated it will be highlighted with a different background color. Only the highlighted fields will be updated. When you have selected and entered data in the fields to be updated click **Ok** to update. A prompt will be displayed advising how many records will be affected and requesting confirmation before proceeding.

Data Listings

Data > Listings

A selection of data listings are available and can be printed, viewed or emailed. Sorting, grouping and filtering options are available for most listings. Some listings have extra options that allow you to choose the data to be included on the listing.

Label Printing

File > Export Data > Items for Label Printing

Item data can be exported for the purpose of printing labels via a third-party software application. The selected items are exported in a comma-delimited text file. The Number of Labels for each item can be edited directly in the grid. The **Apply to all items in the grid** button can be used to set the number of labels for all items in the grid. The **Apply to updated items only** works in the same way but only applies to items that have been updated since the last time they were exported for label printing.

Items can also be added to the export in the following ways:

- Select the required items in the Items grid (**Data > Items**) and then click the **Add to Labels Export** button. Each time this button is clicked the number of labels for each selected item will be incremented by the quantity specified for that item in the 'Default Number of Labels' field (**Items grid > Modify > Other tab**). A dialog box will confirm that the items have been added and then when exiting the Items grid a prompt will be displayed with the option to go to the Export Items for Label Printing feature.
- Whenever a new Stock Purchase is recorded the number of labels for each of the items in the purchase will be incremented according to the 'Number of Labels when Purchased' setting (**Items grid > Modify > Other tab**).

Exporting

When you have finished setting the number of labels required for each of your items click the **Export** button to proceed. A dialog with the following options will be displayed:

Label Printing Software	Choose the third-party label printing software that will be used to print your labels. Select the 'None' option if you just want to produce the export file.
Export File	The path/filename of your export file.
Label Format File	The label format file to be opened in your label printing software. ***Note****: Leave this field blank if you will be creating a new label format file.*
Print labels and exit software	This option will pass a command line parameter to your label printing software instructing it to print your labels immediately and then exit.
Include labels for all barcodes attached to each item	If you have multiple barcodes attached to items then this option will export label data for each barcode. If this option is not set then label data will only be exported for the primary barcode attached to each item.

Creating a New Label Format File

The first time you use Export Items for Label Printing you will need to create a label format file. Follow the steps below to create a new label format file:

1) Select some items to be exported for label printing by entering a Number of Labels in the grid
2) Click Export
3) Choose your Label Printing Software
4) Choose a path/filename for the export file
5) Leave the Label Format File field blank
6) Leave the Print labels and exit software option unticked
7) Click Export
8) In your label printing software*:
   a) Link your new label to your Export File
   b) Design your label and insert fields from the Export File
   c) Save your new label format file

**Refer to the documentation for your label printing software.*

Part 6

Communications

Communications

The communications functions in Uniwell Lynx allow you to send data to or retrieve data from your POS terminals. Typically, when using these functions, your available POS terminals will be displayed in a grid and you can choose which terminals you want to communicate with by ticking the check boxes. The **Select All** and **Clear All** buttons can be used to quickly select or deselect all terminals.
Note*: Sales terminals are not included in the selection grids if they have been disabled by setting their Connection parameter to 'None'. Also, terminals may be excluded from the selection grid if the particular communications function is not relevant due to the configuration of the terminal.*

Communication Errors

As each terminal is processed during a communications job the Status column in the grid will indicate whether the job was successful or not. If communications to one or more terminals failed you can click the **View Error Report** button to view information about the problem. By clicking on the **Retry** button you can execute the communications job again for the terminals that had failed.

Testing Communications

Communications > Communications Test

This function provides a quick way to check if communications with your POS terminals is working. Select the required POS terminals in the grid and then click **Ok** to perform the test.

Sending Program

Communications > Send Program

This function allows you to send program data to your POS terminals. As shown in the table below there are a number of options available.

Program Selection	
Date/Time	Send the current Date/Time. The date/time sent will be adjusted automatically for terminals where a Time Zone other than 'System Default' has been selected.
Other program options	The other program options allow you to choose which data to send to your terminals. ***Note****: The program options listed above the* ***Select All*** *and* ***Clear All*** *buttons refer to data in your Uniwell Lynx data file.*
Options	
Send updated records only	Send only records that have changed since you last sent program data to the POS terminal.
Delete unknown PLUs/ Clerks/Customers	Deletes PLUs from your terminals that do not exist in your Uniwell Lynx data file. Clerks and Customers that do not exist in your Uniwell Lynx data file will also be deleted from your terminals.
Send to USB Drive	Saves the program data to a USB drive. You will be prompted by terminal to select the USB drive before the program data is saved.
Send Customer Points Balances	Includes customer points balances when sending Customers.
Send Screen Layout from PRG File	Sends the screen layout in the linked PRG File. ***Note****: Screen layouts in PRG files can be edited via* ***Data > Screen Layouts*** *.*
Send Button Images	Sends the button image files.
Send GCD Images	Sends GCD image files for use with the Graphic Customer Display.
Time Zone 1 Setup	If you will be collecting Hourly Reports then the Time Zone 1 program must

	be setup correctly in your Uniwell POS Terminals before any sales are entered at the terminals. This option will send the correct Time Zone 1 Setup to your terminals. ***Note**: After sending the Time Zone 1 Setup to your terminals you should use Extract Program to update the PRG files linked to your POS terminals so that the Time Zone 1 Setup is also updated in these files.*

Collecting and Reading Sales

Communications > Collect Sales (Z)

Collect Sales extracts sales information from your POS terminals and stores it in sales batches. The sales figures in your POS terminals are cleared during this process. The following options are available when collecting sales:

Options	
Sales Date	Sales data will be posted to the selected sales date. ***Note**: Sales data from FTP Servers, File Folder, USB drives and Electronic Journal data are date/time stamped and will be posted accordingly regardless of the selected sales date.*
Process Sales Batches	Select this option to automatically process sales batches into live data.
Collect Options	
Collect from USB Drive	Extracts sales data from a USB drive. You will be prompted by terminal to select the USB drive before the sales data is collected. ***Important**: When prompted to select the USB drive you must select the root directory of the USB drive (not any of the sub-folders on the USB drive). For example, if the USB drive is G: you must select G:\ (not G:\0001001 or any other sub-folder).*

Communications > Read Sales (X)

Read Sales extracts sales information from your POS terminals but does not clear the sales figures in the terminals.

Extract Program

Communications > Extract Program

Uniwell Lynx includes an option to extract program data from your POS terminals. This is particularly useful when setting up the software for use with an existing POS terminal. During this process existing information in your data file will be over-written and new items will be added. The following options are available when extracting program:

Program Selection	
Program options	The program options allow you to choose which data to extract from your terminals. ***Hint***: *Leave all the program options unticked if you just want to update your linked PRG files.*
Options	
New Items only	Only new items will be extracted. Items that already exist in your data file will not be updated.
Extract from existing PRG File	Program data will be extracted from the existing linked PRG file for each terminal. ***Note***: *If this option is not selected then the PRG files will be extracted from your terminals and will overwrite any existing PRG files.*
Extract from USB Drive	Extracts the program data from a USB drive. You will be prompted by terminal to select the USB drive before the program data is extracted.

Backing Up POS Terminals

Communications > Backup POS terminal

You can use this function to backup program data from your POS terminal. The backup file can then be used to restore the terminal in the event of program data loss at the terminal or if a faulty terminal has to be replaced. Select the required POS terminal, use the Selection drop-down list to choose which data you want to backup and then click **Ok**. You will then be prompted to choose a directory and filename for the backup file.

Restoring POS Terminals

Communications > Restore POS terminal

The Restore POS terminal function is used to restore the memory in a terminal from a backup file on your computer. Select the required POS terminal, use the Selection drop-down list to choose which data you want to restore and then click **Ok**. You will then be prompted to locate the backup file to be restored to your POS terminal.

Important: *Restoring an incorrect backup file may corrupt the memory in a POS terminal. Typically, backup files are not compatible with different models or firmware versions.*

Journal Monitor

Communications > Journal Monitor

Journal Data can be monitored live via Ethernet using this function. Click on the POS terminal in the grid to select it for viewing. Journal data from other terminals will be captured in the background and available for viewing when you switch terminals. Journal data is only captured while the Journal Monitor is active and is not stored when you exit this feature.

Important*: The Journal Data Transfer output must be correctly configured in the POS terminal in order to use this feature. To set the Port Number to be used for your POS terminals go to* ***Setup > Preferences > Communications****.*

Scheduling Jobs

Communications > Scheduled Jobs

Send Program and Collect Sales communications jobs can be scheduled to occur unattended. As shown in the table below there are a number of options available for scheduled jobs.

Date & Time	The date and time when the scheduled job should be executed.
Collect Sales	Collect sales from the selected terminals.
Send Program	Send program to the selected terminals.
Print Communications Report	Print a Communications Log report after the scheduled job has been executed.
Exit After Job	Exit Uniwell Lynx after the scheduled job has been completed.
Automatic Data Backup	Automatically backup your data file after the scheduled job has been executed.
Collect Sales Options	
Post sales to previous day	Use this setting if the job is scheduled to occur the day after the sales were entered at the terminals.
Process Sales Batches	Select this option to automatically process sales batches into live data.
Print Batch Reports	
Individual Reports	Print the selected reports for each terminal.
Consolidated Reports	Print the selected reports consolidated for all terminals.
Report Selections	Choose the batch reports to be printed.
Email Batch Reports	
Email to	The recipient's email address for the reports. Use semicolons (;) to separate email addresses if sending to multiple recipients.
Individual Reports	Email the selected reports for each terminal.

Consolidated Reports	Email the selected reports consolidated for all terminals.
Report Selections	Choose the batch reports to be emailed.
PDF Format	Email the batch reports as PDF attachments.
CSV Format	Email the batch reports as CSV files.
Send Program Selection	
	Refer to Send Program for details.
Send Program Options	
	Refer to Send Program for details.
Email Saved Reports and/or Send to Cloud Drive	
Email to	The recipient's email address for the selected saved reports. Use semicolons (;) to separate email addresses if sending to multiple recipients.
Send to Cloud Drive	Send the select saved reports to your cloud drive.
Schedule Repeat	
Repeat Schedule	Repeat the scheduled job daily.
Repeat Hourly	Repeat the scheduled job hourly.
Start/End Time	Set the start and end times for the hourly repeat.
Days of the Week	The days of the week to execute the scheduled job.
Day of Month	The day of the month to execute the scheduled job. (0 = Any day of the month, 31 = Last day of the month)

Execution of Scheduled Jobs

The following checklist will help you to ensure that your scheduled jobs are executed as expected:

- Uniwell Lynx must be running on your computer with the data file containing your scheduled job open.
- There must be no modal forms* left open in Uniwell Lynx.
- Your POS terminals must be left in a state that permits communications - ie. not switched off or with a transaction or programming job in progress.
- All hardware required to facilitate communications between your computer and your POS terminals should be operational. (Modems, network hubs etc.)
- The system date and time in your computer must be correctly set and sufficient system resources should be available.

**Modal forms are forms that take priority over all other forms in Uniwell Lynx. That is, if a modal form is open then you cannot access any other forms or the menu until the modal form is closed. An example of such a form is Backup Data File.*

Manually Executing Scheduled Jobs

Scheduled jobs can be manually executed at any time by selecting the scheduled job in the grid and then clicking the **Execute Job** button. Executing a job manually will not delete the job or change the date or time that the job is scheduled to execute.

Communications Log

Sales > Manager Reports

The communications log provides a history of all communications with your POS terminals. The report can be viewed, printed or emailed. Date range and POS terminal filters are included so that you can narrow down your selection. The log report includes details of when jobs were executed and whether or not the job was completed successfully. Scheduled jobs are also indicated on the report. If the 'Include detailed error messages' option is selected then the report will include details of operations that failed during communications and the error messages. If the 'Show errors only' option is selected then the report will only include communications jobs that failed.

Part 7

Reports

Reports

Uniwell Lynx includes an extensive range of reports and report options that can be used to analyse your data. These reports are organized into the following groups.

- Sales
- Stock
- Supplier
- Customer
- Manager

Saved Reports

This feature allows you to save commonly used report configurations. Follow the steps below to save a report:

1. Select the required report
2. Set the group, sort, filter and other options as required
3. Click **Save**
4. Enter a description for your saved report
5. Select a format for reports that are emailed or sent to a cloud drive
6. Click **Ok**

To access your saved reports go to the **Saved Reports** tab.

Part 8

Sales Analysis

Sales Analysis

Sales analysis is essential in any retail business and profit analysis even more so. The clear and concise sales reports included in Uniwell Lynx will enable you to closely monitor the performance and profitability of your business. Report filters and sorting and grouping options make it easy to fine-tune the content and layout of your reports.

Sales Batches

The sales data collected from your POS terminals is stored in sales batches. A new sales batch is created every time you collect sales data from a terminal. **Sales Batch Reports** provide a way to analyse individual batches. When a sales batch is processed the sales data it contains is added to the **Sales Reports** in Uniwell Lynx. These Sales Reports include an extensive range of options that can be used for in-depth analysis of your sales data.

Sales Reports

Sales > Sales Reports

The table below provides details of the various reports available. Reports can be view, printed, emailed or sent to a cloud drive. Grouping, sorting, filtering and other options vary by report and some reports are only available with particular optional modules. By default sales figures are shown inclusive of tax. An option to show 'Tax Exclusive Sales Amounts' is available for some reports.

***Note**: Some report options are mutually exclusive.*

<table>
<tr><td>POS terminals</td><td>Total group sales by terminal both exclusive and inclusive of tax.</td></tr>
<tr><td>Transaction</td><td>Transaction totalisers and major group sales based on Auto Full Transaction report from terminals. Averages and average per transaction are included where relevant.</td></tr>
<tr><td>Major Group Sales</td><td>Major group sales with optional chart.</td></tr>
<tr><td>Group Sales</td><td>Group sales with optional chart.</td></tr>
<tr><td>Group Sales by Location</td><td>Cross-tab report of group sales amounts by location.</td></tr>
<tr><td>Daily Sales</td><td>Total group sales by date with optional chart.</td></tr>
<tr><td>Daily Sales by Location</td><td>Cross-tab report of total group sales by date by location.</td></tr>
<tr><td>Item Sales</td><td>Item sales with following options:
<table>
<tr><td>Summarise Report</td><td>Show sub-totals only based on selected grouping options.</td></tr>
<tr><td>Show sales by price level</td><td>Show a breakdown of sales by price level for each item.</td></tr>
<tr><td>Show cost of sales</td><td>Show cost of sales for each item.</td></tr>
<tr><td>Show average price</td><td>Show average selling price for each item.</td></tr>
<tr><td>Show comparison</td><td>Show actual sales compared with theoretical sales based on a selected price level.</td></tr>
<tr><td>Show PLU/Barcode</td><td>Show the primary Barcode or PLU code for each item.</td></tr>
</table></td></tr>
<tr><td>Item Sales by Day</td><td>Item sales by day of the week. By default this report is in landscape format. Use the 'Narrow Layout' to show the report in portrait format.</td></tr>
<tr><td>Mix and Match</td><td>Mix and Match sales.</td></tr>
<tr><td>Best Sellers</td><td>Best selling items based on sales quantity, sales amount or profit amount.</td></tr>
</table>

Worst Sellers	Worst selling items based on sales quantity, sales amount or profit amount. ***Note****: Does not include items that have not been sold during the selected date range.*
Zero Item Sales	Items that have not been sold within the selected date range. Includes date last sold and current stock level for stock control items.
Item Last Sold	Date last sold and current stock level for stock control items
Promotional Item Sales	Items sales of items in the selected promotion for the date range of that promotion.
Hourly Sales	Hourly sales with optional chart. Optionally includes 15 minute interval breakdown of hours*. **Amounts by 15 minute interval are calculated by dividing longer intervals equally if 15 minute intervals are not supported in the Time Zone 1 Report extracted from the terminals.* ***Important****: The Time Zone 1 Setup must be correctly configured in your POS terminals. (See* ***Send Program****)*
Hourly Sales by Day	Hourly sales by day of the week with optional chart. ***Important****: The Time Zone 1 Setup must be correctly configured in your POS terminals. (See* ***Send Program****)*
Clerk Transaction	Clerk transaction totalisers based on Auto Full Transaction report from terminals. Averages and average per transaction are included where relevant.
Clerk Analysis	Transaction count, total sales* and average by clerk. Report can be sorted by Clerk Code, Transaction Count or Sales Amount. **Sum of Sales Types 1 to 4.*
Electronic Journal	Electronic journal print data.
Complimentary Item Sales	Items given away using the Complimentary function.
Attendance	Clerk attendance report showing log on and log off times.
Deposit Book	Deposit book report showing in date, out date and amount.
Electronic Journal Based Reports *The following reports are built from electronic journal raw data. The 'EJnl' option in Collect Sales Options must be selected and your POS terminal must be configured correctly to include both the print and raw electronic journal data.*	
Major Group Spend Analysis	Transaction count, total spend and average spend by major group.
Group Spend Analysis	Transaction count, total spend and average spend by group.
Hourly Spend Analysis	Transaction count, total spend and average spend by hour with optional chart.
Item Hourly Sales	Item sales with hourly breakdown by item. Optionally includes 15 minute interval breakdown of hours.
Clerk Group Sales	Group sales by clerk with option to include cost of sales and profit.
Clerk Item Sales	Item sales by clerk with option to include cost of sales and profit.

Sales Batch Reports

Sales > Sales Batch Reports

The sales batches grid provides basic information about your sales batches including the total of each batch and whether or not individual batches have been processed. The following reports are available by individual batch or consolidated if multiple batches have been selected in the grid. By default when you select multiple batches in the grid consolidate reports will be produced. To produce individual batch reports when selecting multiple batches use the **Individual Reports** option in the **Multi-Select Options** box.

***Note**: Batch totals are based on the total group sales in the batch.*

Transaction	Transaction totalisers and major group sales based on Auto Full Transaction report from terminals. Averages and average per transaction are included where relevant.
Group Sales	Group sales.
Item Sales	Item sales. If a batch could not be processed due to unknown items then use the 'Unknown items only' option to produce a report that only shows the unknown items.
Hourly Sales	Hourly sales. Includes 15 minute interval breakdown of hours*. **Amounts by 15 minute interval are calculated by dividing longer intervals equally if 15 minute intervals are not supported in the Time Zone 1 Report extracted from the terminals.* ***Important**: The Time Zone 1 Setup must be correctly configured in your POS terminals. (See **Send Program**)*
Clerk Transaction	Clerk transaction totalisers based on Auto Full Transaction report from terminals. Averages and average per transaction are included where relevant.
Electronic Journal	Electronic journal print data.
Customer Sales	Customer sales quantity and amount. ***Note**: This report is based on the Uniwell Customer Sales Report.*
Customer Loyalty	Customer loyalty points awarded and used. ***Note**: This report is based on the Uniwell Customer Sales Report.*
Attendance	Clerk attendance report showing log on and log off times.

Sales Batch Properties

Sales batch properties can be edited for unprocessed batches or viewed for processed batches. Editing sales batch properties allows the batch date or location to be changed or batch components to be suppressed if required.

Edit Attendance Times

This option can be used to edit clerk log on/log off times for the Attendance report.

Delete Unknown Items

If a batch could not be processed due to unknown items then this option can be used to delete the unknown items from the batch so that it can be processed.
***Warning**: Using this option will result in a loss of sales data for the unknown items.*

Processing Sales Batches

Sales > Process Sales Batches

Processing sales batches adds the contents of the batches to the **Sales Reports** in Uniwell Lynx. Sales batches that have not been processed are not included in Sales Reports. The Process Sales Batches grid displays all batches that have not been processed. Batches can be selected for processing by ticking the check boxes in the grid. Click **Ok** to process the selected batches or **Cancel** to exit.

Unprocessing Sales Batches

Sales > Unprocess Sales Batches

Unprocessing sales batches removes the contents of the batches from the **Sales Reports** in Uniwell Lynx. The Unprocess Sales Batches grid displays all batches that have been processed. Batches can be selected for unprocessing by ticking the check boxes in the grid. Click **Ok** to unprocess the selected batches or **Cancel** to exit.

Deleting Sales Batches

Sales > Delete Sales Batches

Sales batches that are not required can be deleted. The Delete Sales Batches grid displays all batches that have not been processed. Processed batches must be unprocessed before they can be deleted. Batches can be selected for deleting by ticking the check boxes in the grid. Click **Ok** to delete the selected batches or **Cancel** to exit.

Warning*: Sales batches that are deleted cannot be recovered.*

Journal Receipts

Sales > Journal Receipts

Journal receipts can be viewed using this feature. To print a journal receipt click the **View** button and then click the Printer icon in the viewer window.
Note*: Journal receipts are based on the journal print data extracted from your terminals.*

Deposit Book

Sales > Deposit Book

The deposit book grid shows deposit data that has been collected from Uniwell POS terminals. In date, out date, amount and status are shown for each deposit. The total deposits held amount is also shown. Deposits can be deleted when no longer required. For further information about the Deposit Book feature you should consult the Instruction Manual supplied with your Uniwell POS terminal.

Part 9

Customers

Customers

The optional Customers module has been designed to help you manage your customer accounts and analyse customer sales activity. Your Uniwell POS Terminals must be configured correctly for use with the Uniwell Lynx as outlined in the following table.

Configuring Uniwell POS terminals for use with the Uniwell Lynx Customers module **Option 1: Track customer balances at the POS terminal and in Uniwell Lynx**	
Customer File Maximum	**Program > System > Maximums > Customer File** Set the maximum number of customers. ***Note****: Ensure that sufficient memory has been allocated for Journal Data. Journal data is used for the Customer Journal Report and Customer Receipts feature.*
Charge Media	**Program > Payment > Media** Assign a Media to be used for charging to customer accounts. Use 'Charge to customer' for the Media Type setting. ***Important****: The Customer Charge Media settings in Uniwell Lynx must be configured correctly before any customer transactions are collected from your terminals. (****Setup > Preferences > Other****)*
Screen Layout	Add Customer Manage and Customer Charge Media buttons to the screen layout.
Configuring Uniwell POS terminals for use with the Uniwell Lynx Customers module **Option 2: Track customer balances in Uniwell Lynx only**	
Customer File Maximum	**Program > System > Maximums > Customer File** Set the maximum number of customers. ***Note****: Ensure that sufficient memory has been allocated for Journal Data. Journal data is used for the Customer Journal Report and Customer Receipts feature.*
Charge Media	Assign a Media to be used for charging to customer accounts. Use 'Local Cash' for the Media Type setting. (***Data > Media***) ***Important****: The Customer Charge Media settings in Uniwell Lynx must be configured correctly before any customer transactions are collected from your terminals. (****Setup > Preferences > Other****)*
Customer Payment	The Tip function can be used for entering customer payments at the terminals. Edit the Tips Report Text (***Data > Function Texts***) Edit the Tip User Text in the POS terminal (***Program > System > User Text***)
Screen Layout	Add Customer Manage and Customer Charge Media buttons to the screen layout. A customer payment button (Tip) can also be added if required.

Entering Customer Transactions

The correct way to enter customer transactions will depend on which model terminals your are using and how they have been configured. The following table provides an overview of how to enter customer transactions.

Option 1: Track customer balances at the POS terminal and in Uniwell Lynx	
Customer transactions entered at the POS terminal	
Customer Sales	1 Use the Customer Manage button to pickup the required customer account 2 Enter the sales items 3 Finalize with the Customer Charge Media ***Note****: If the sale is not being charged to the customer's account then finalize with the appropriate media for the method of payment.*

Customer Payments	1 Use the Customer Manage button to display the Customer File select the required customer account in the grid 2 Press the Payment button 3 Select the invoices to be paid 4 Press the payment button 5 Enter the payment amount then press Enter 6 Choose the payment media then press Ok 7 Press Ok ***Important**: All customer payments must be entered at the POS terminal and not in Uniwell Lynx.*
Customer transactions entered in Uniwell Lynx	
Customer Adjustments	The Customer Transactions feature in Uniwell Lynx should only be used to enter any adjustments that may be required in order to synchronize the customer balances in Uniwell Lynx with the customer balances in the POS terminal. ***Note**: Customer transactions entered in Uniwell Lynx cannot be sent to the POS terminal and do not affect the customer balances in the POS terminal.*
Option 2: Track customer balances in Uniwell Lynx only	
Customer transactions entered at the POS terminal	
Customer Sales	1 Use the Customer Manage button to pickup the required customer account 2 Enter the sales items 3 Finalize with the Customer Charge Media ***Note**: If the sale is not being charged to the customer's account then finalize with the appropriate media for the method of payment.*
Customer Payments	1 Use the Customer Manage button to pickup the required customer account 2 Enter the payment amount and then press the Customer Payment button (Tip) 3 Finalize with the appropriate media
Customer transactions entered in Uniwell Lynx	
Customer Payments/ Adjustments	**Sales > Customer Transactions** Customer payment or adjustment transactions can be entered in Uniwell Lynx.

Important: *Regardless of which of the above options is used, customer transactions should not be reopened and modified at the Uniwell AX/HX terminals. This is not and cannot be supported for any current firmware versions of the AX/HX terminals.*

Customer Reports

Sales > Customer Reports

The table below provides details of the various reports available. Reports can be view, printed, emailed or sent to a cloud drive. Grouping, sorting, filtering and other options vary by report.

***Important**: The following reports are built from electronic journal raw data unless specified otherwise. The 'EJnl' option in Collect Sales Options must be selected and your POS terminals must be configured correctly to include both the print and raw electronic journal data.*

Aged Receivables	Customer outstanding balances as at the specified Ageing Date. Includes Total, Current, 30 Days, 60 Days and 90 Days columns.
Customer Transaction	Customer transactions showing date, reference, invoices, payments and adjustments.
Customer Statements	Customer account statements. Click the **Customer Statement Message**

	button to setup a message to be included on all statements.
Customer Balances	Customer account and points balances. ***Note****: Points balances require both the electronic journal raw data and the Customer Sales Report.*
Customer Analysis	Total sales by customer.
Top Customers	Top customers based on sales amount.
Customer Sales	Customer sales quantity and amount. ***Note****: This report is based on the Uniwell Customer Sales Report.*
Customer Loyalty	Customer loyalty points awarded and used. ***Note****: This report is based on the Uniwell Customer Sales Report.*
Customer Group Sales	Group sales by customer.
Customer Item Sales	Item sales by customer.
Customer Journal	Journal print data by customer.

Email Customer Statements

Sales > Email Customer Statements

Customer statements can be emailed to your customers as PDF attachments. Choose the Date Range for the customer statements and then select the customers you want to email statements to by ticking the check boxes in the left column of the grid. Only customers that have an email address, an outstanding balance and transactions within the selected Date Range are displayed in the grid. The customer statement message lines and the customer statement email message can be edited by clicking on the **Customer Statement Message** button. Click **Send** to email customer statements to the customers selected in the grid.

Email Customer Promotions

Sales > Email Customer Promotions

Customer promotions can be emailed to your customers as attachments. Choose the required filters and then click **Apply Filter** to display the appropriate customers in the grid. You can further narrow your selection of customers by using the check boxes in the left column of the grid. Only customers that have an email address are displayed in the grid. Enter the email Subject and Message then select your attachments. Click **Send** to email your promotion to the customers selected in the grid. Alternately, you can click the **Export** button to produce a CSV file for use in external software.

Customer Transactions

Sales > Customer Transactions

While it is recommended that all customer transactions be entered via your POS terminals, it is possible to enter balance adjustments and payments directly in Uniwell Lynx. Transaction amounts can be positive or negative.
Important*: Customer transactions entered in Uniwell Lynx cannot be sent to your POS terminals and do not affect the customer balances in your POS terminals. Therefore, if you are tracking customer balances at your POS terminals you should only use the Customer Transactions feature in Uniwell Lynx if you need to make adjustments to the customer balances in Uniwell Lynx in order to synchronize them with the customer balances in your POS terminals.*

Customer Transactions Created at POS terminals

By default the customer transactions grid only displays transactions that were created in Uniwell Lynx. The 'Show transactions from POS terminals' can be used to also display transactions that were created at your POS terminals. Customer transactions created at your POS terminals can be deleted or the Customer Code can be modified.

Customer Invoices

Sales > Customer Invoices

Customer invoices that were created at a POS terminal with a Bill Number can be viewed or printed using this feature. Click on the **Header/Footer** button to setup the header and footer texts that will be included on all invoices and to select from the available invoice layouts.

Invoice Layout 1	A custom format for some users in Australia
Invoice Layout 2	A custom format for some users in Germany
Invoice Layout 3	Based on the Journal Data

Customer Invoice Summary

A customer invoice summary can be viewed/printed by selecting an individual customer to be displayed in the grid and then clicking the **Invoice Summary** button.

Customer Receipts

Sales > Customer Receipts

Customer receipts can be viewed using this feature. To print a customer receipt click the **View** button and then click the Printer icon in the viewer window.
Note*: Customer receipts are based on the journal print data extracted from your terminals.*

Part 10

Stock Control

Stock Control

The optional Stock Control module has been designed to help you manage your stock and suppliers. This module can be further enhanced by the addition of the Linked Items, Purchase Orders and Multi-Location modules.

Stock Purchases

Stock > Stock Purchases

The stock purchases grid allows you to view purchases by supplier and date range and also to add, modify, delete, view or print purchases.

Adding and Modifying Stock Purchases

The 'Enter New Purchase' screen allows you to select the supplier, enter the invoice date, location, your order number and the suppliers invoice number as well as the invoice lines and freight. The 'Tax Inclusive' check box can used to select whether or not amounts are entered inclusive of tax. When modifying purchases a similar screen is displayed however the supplier cannot be changed. Item codes, supplier item codes or barcodes can be entered in the 'Item Code' column. If you are using a Portable Data Terminal to enter your invoices lines then click the **Import** button to import the lines from your PDT.

***Hint**: When entering invoice lines you can enter the line total in the 'Total' column and the unit price will be calculated automatically.*

Stock Returns

Stock returns are entered the same as purchases except with negative quantities.

Import and Export

Stock purchases can be exported from one data file and imported into another. Using this feature it is possible to enter a stock purchase at a remote location using a copy of the main data file and then send the stock purchase as a file for import into the main data file.

Purchase Orders

Stock > Purchase Orders

The purchase orders grid allows you to view orders by supplier and date range and see the current status of each order.

Adding and Modifying Purchase Orders

The 'Enter New Purchase Order' screen allows you to select the supplier, enter the invoice date, location and your order number as well as the invoice lines and freight. The 'Tax Inclusive' check box can used to select whether or not amounts are entered inclusive of tax. When modifying purchase orders a similar screen is displayed however the supplier cannot be changed. Item codes, supplier item codes or barcodes can be entered in the 'Item Code' column. If you are using a Portable Data Terminal to enter your order lines then click the **Import** button to import the lines from your PDT.

***Hint**: When entering order lines you can enter the line total in the 'Total' column and the unit price will be calculated automatically.*

Reordering

Purchase order lines can be automatically created based on reorder/recommended levels. To do so, create a new purchase order and select the supplier then click **Reorder**. The purchase order lines will be automatically created for items where the Primary Supplier for the items matches the selected supplier for the purchase order.

Receiving Purchase Orders

Purchase orders must be received via the purchase orders grid by highlighting the required order and then clicking **Receive Order**. A Stock Purchase will be created based on the outstanding items in the purchase order. If the order was only partially received the edit the line quantities accordingly.

Emailing Purchase Orders

Select an order in the grid and click the **Email** button to send a copy of the order in PDF format to the supplier's email address. Supplier email addresses can be edited via **Data > Suppliers**.

Supplier Payments

Stock > Supplier Payments

The Supplier Payments grid shows payments that have been entered for the selected date range and can be filtered by supplier. To enter a new supplier payment click the **Add** button. The Supplier Payment screen allows you to select the supplier and will then display any outstanding invoices. Enter the payment date, a reference number and the amount paid. Then allocate the payment to the outstanding invoices as required. If you click the **Pay All** button then all outstanding amounts will be paid and the total payment will be entered in the 'Amount' box. Previously paid invoices can be displayed in the grid by ticking the 'Include closed purchases' check box and payments can be reversed by entering negative amounts.

Stocktake

Stock > Stocktake

The Stocktake feature enables you to enter stocktake counts, view the variances and update your stock levels. If you have the optional Multi-Location module then you can enter and process your stocktakes by location. Any difference between the stock level in your data file as at the Stocktake Date and the stock count is calculated and displayed in the grid. Figures entered into the 'Stock Count' column are not cleared when closing the stocktake screen, therefore you can access this screen as many times as required to complete the entry of your stocktake count. The stock count cell for items that have not been counted should be left blank. If however, the item has been checked and has a zero count then a '0' must be entered in the the 'Stock Count' column. Stocktake data can also be imported from a Portable Data Terminal by clicking the **Import** button. The following table provides an overview of the stocktake process.

Step 1 – Enter and process ALL stock transactions prior to stock count
• All sales data from prior to the stock count must be collected and processed • All stock purchases received prior to the stock count must be entered • All other stock transactions that occurred prior to the stock count must be entered
Step 2 – Enter stocktake and check variances
• Perform physical stock count • Enter stock count in stocktake grid or import from a Portable Data Terminal ***Important: You must select the correct Stocktake Date at the top of the Stocktake screen in order for the Stocktake Date stock levels and resultant stock variances to be calculated correctly.*** • If you have done a full stocktake and stock counts have been entered for all items that are currently in stock then you can click **Zero Uncounted** to set the stock count to zero for the remaining items • Print a Stocktake Variance report to check stocktake accuracy
Step 3 – Update Stock Levels
• Click **Update Stock Levels** (See **Updating Stock Levels** and **Opening Stock Levels** below for more information)

Updating Stock Levels

Once the stocktake count entry has been completed click the **Update Stock Levels** button to process the stocktake. Variances will be recorded for items where there is a difference except where the stock count sets the opening stock level.
Note*: Variances are calculated as the difference between the stock level as at the Stocktake Date and the stock count and any variances will be posted to the Stocktake Date.*
Important*: If any of the stock levels entered in your stocktake are opening stock levels then the following* ***Opening Stock Levels*** *steps must be done in order to complete the update stock levels.*

Opening Stock Levels

A message will be displayed if any opening stock levels are detected. After acknowledging the message you will be returned to the stocktake grid so you can check and if necessary edit the cost prices for your items in order to set the opening stock value. After you have checked and edited the cost prices you must click the **Update Stock Levels** button again to record the opening stock levels.

Partial Stocktakes

If you are only doing a partial stocktake then the 'Stock Count' column should be left blank for all items that are not included in your stocktake. Items with a blank stock count are skipped during the Update Stock Levels process.

Stock Write-offs

Stock > Stock Write-offs

Typically, stock write-off transactions are used to account for breakage, wastage or any other event that results in the loss of stock. The stock write-offs grid allows you to view write-offs by date range and also to add, modify, delete, view or print write-offs.

Entering Stock Write-offs

The 'Enter New Stock Write-off' screen allows you to enter details, transaction date and a reference number as well as the write-off lines. Item codes or barcodes can be entered in the 'Item Code' column. A write-off category can be specified for each line in the stock write-off.

Hint*: To setup meaningful names for your write-off categories go to Setup > Customize > Write-off Categories.*

Stock Transfers

Stock > Stock Transfers

Stock can be transferred between items and/or locations. The stock transfers grid allows you to view transfers by date range and also to add, modify, delete, view or print transfers.

Entering Stock Transfers

The 'Enter New Stock Transfer' screen allows you to enter details, transaction date and a reference number as well as the transfer lines. For each line in the transfer you can enter the source location*, item and quantity and the destination location*, item and quantity. Item codes or barcodes can be entered in the 'Item Code' columns. If you are using a Portable Data Terminal to enter your transfer lines then click the **Import** button to import the lines from your PDT.

**Stock can only be transferred between locations if you have the optional Multi-Location module.*

Transferring Stock Between Items

This feature can be used to transfers different products to a common product or to build products from components and then add the finished product into stock. Consider the following examples:

House Scotch
A bar sells house scotch by the nip but does not always use the same scotch and/or size bottles. The following steps show how handle this situation and maintain accurate stock control: • Create a stock control item for each brand and size bottle scotch that is used • Create a stock control item for House Scotch litres • Create a linked item for Nips of House Scotch and link it to the House Scotch litres item with a quantity of '30/1000' assuming 30ml nips • When a particular bottle of scotch is transferred to the bar for use as house scotch enter a stock transfer: o The source item will be the bottle of scotch and the source quantity will be the number of bottles o The destination item will be House Scotch litres and the destination quantity will be the total number of litres in the bottles transferred • When sales of nips are processed stock will be deducted from the House Scotch litres item
Gift Packs
A gift shop makes gift packs from individual products. These gift packs are made in batches and put into stock. The following steps show how handle this situation and maintain accurate stock control: • Create stock control items for each of the individual products • Create a linked item that will be used to build the gift packs and enter item links for the components required to build one gift pack • Create a stock control item for the finished Gift Pack product • When a batch of gift packs is made enter a stock transfer: o The source item will be the linked item that was created for building gift packs and the source quantity will be the number of gift packs made o The destination item will be the finished Gift Pack item and the destination quantity will also be the number of gift packs made

Stock and Supplier Reports

Stock > Stock Reports/Supplier Reports

The table below provides details of the various reports available. Reports can be view, printed, emailed or sent to a cloud drive. Grouping, sorting, filtering and other options vary by report.

Stock Reports	
Stock Valuation	Stock valuation based on standard, last cost, average cost or a sell price for the selected 'Valuation Date'. Options are available to include any combination of positive, zero and negative stock levels. The 'Summarise report' can be used to show sub-totals only based on selected grouping options.
Stock Transaction	Stock transactions by item showing opening stock for the selected date range, stock in, stock out and a running stock balance. ***Hint****: If you believe the stock level for a particular item is incorrect then you can use this report filtered to show just that item to see all transactions that have affected the stock level of that item for a chosen date range. This will help you to identify an transactions that have been entered incorrectly.*
Stock Movement	Stock movement by item showing opening and closing stock levels, and the total quantities of purchases, transfers, sales, write-offs and variances for the selected date range.
Stock Coverage	Shows stock coverage in days based on current stock level and average daily sales for the selected data range.

<table>
<tr><td>Reorder</td><td>Reorder report showing current stock level, quantity on order, recommended level and suggested reorder quantity.</td></tr>
<tr><td>Stock Purchases</td><td>Stock purchases quantity and amount by item for the selected date range.</td></tr>
<tr><td>Stock On Order</td><td>Stock on order quantity and amount by item. Use the 'Show order details' option to include a breakdown of orders for each item.</td></tr>
<tr><td>Purchase Orders</td><td>Purchase orders grouped by status for the selected date range.</td></tr>
<tr><td>Stocktake Variance</td><td>Stocktake variances showing stock level, count, variance, value and variance %.
Note: This report is only available while entry of a stocktake is in progress. When a stocktake is processed by doing an Update Stock Levels this report is reset ready for the next stocktake.</td></tr>
<tr><td>Stock Write-offs</td><td>Total stock write-offs by item with breakdown by write-off categories for the selected date range.</td></tr>
<tr><td>Stock Transfers</td><td>Stock transfers by item showing the quantity and value for the selected date range.</td></tr>
<tr><td>Stock Variance</td><td>Stock variances by item showing the quantity and value for the selected date range.
Note: Not to be confused with the Stocktake Variance report this report shows variances that have been posted.</td></tr>
<tr><td>Stock Hourly Usage</td><td>Quantity of stock items used by hour for the selected date range. Optionally includes 15 minute interval breakdown of hours. For linked items the usage is report against the individual components not the linked item. For example, in a fast food store that sells multiple products that include BBQ chickens, either whole or pieces, this report could be used to report the total number of chickens used by hour.
Important: This report is built from electronic journal raw data. The 'EJnl' option in Collect Sales Options must be selected and your POS terminal must be configured correctly to include both the print and raw electronic journal data.</td></tr>
<tr><td>Summary</td><td>Includes stock, sales, banking, customer, discount and major group summaries.

<table>
<tr><th colspan="2">Stock Summary</th></tr>
<tr><td>Opening and Closing Stock</td><td>Opening and closing stock valuation based on average cost.</td></tr>
<tr><td>Purchases, Transfers In/Out, Stock Sold, Write-offs, Variances</td><td>The purchases amount is based on actual cost of stock purchased. All other figures are based on average cost at the time the transaction was processed.</td></tr>
<tr><td>Stock Movement</td><td>The sum of purchases, transfers in/out, stock sold, write-offs and variances.</td></tr>
<tr><td>Averaging Variance</td><td>The difference between opening stock + stock movement and closing stock. Whenever stock is received the average cost is re-calculated as (current stock value at average cost + value of stock received)/(new stock level). Averaging variances can result if stock transactions are not entered in the order they physically occurred and particularly when stock levels are allowed to go negative. Direct editing of the average cost and rounding during calculations can also result in an averaging variance.</td></tr>
</table>
</td></tr>
</table>

Sales Summary	
Gross Sales	Total group sales inclusive of tax.
Tax	Total tax calculated on group sales. ***Note****: Tax is calculated based on the tax rates and group tax settings at the time the sales are collected.*
Sales Ex. Tax	Gross Sales - Tax.
Cost of Sales	Total cost of sales calculated on item sales. ***Note****: Cost is calculated based on average cost at the time the sales are collected.*
Profit	Sales Ex. Tax - Cost of Sales.
Cost of Variances	Sum of Variances and Write-offs from Stock Summary.
Cost of Sales Adjusted	Cost of Sales - Cost of Variances.
Profit Adjusted	Sales Ex. Tax - Cost of Sales Adjusted.
Banking Summary	
	Based on Media Tendered figures from Transaction Report. The first 9 media are shown individually and any remaining media are shown consolidated as Other. ***Note****: Customer Charge Media are excluded.*
Customer Summary	
	Customer charges, payments, adjustments and opening/closing balances. ***Note****: The customer summary is not available by location and is only shown on the Grand Totals page of the report.*
Discounts	
	Based on Discount figures from Transaction Report. The first 9 discount types are shown individually and any remaining discount types are shown consolidated as Other.
Major Groups	
	Group sales summarized by major group. The first 9 major groups are shown individually and any remaining major groups are shown consolidated as Other.

Supplier Reports	
Aged Payables	Supplier outstanding balances as at the specified Ageing Date. Includes Total, Current, 30 Days, 60 Days and 90 Days columns.
Supplier Transaction	Supplier transactions showing date, reference, invoices and payments.
Supplier Invoices	Supplier invoices showing reference and a breakdown of taxable amount, tax amount and total by tax code.
Supplier Analysis	Total purchases by supplier.

Stock Transaction History

Stock > Stock Transaction History

The stock transaction history grid allows you to view stock transactions by item and date range.

Viewing Transactions

Click the **View** button to view the transaction or sales batch that included the individual stock transaction that is highlighted in the grid. For variance transactions a Stock Variance report for the date of the transaction will be displayed.

Part 11

Portable Data Terminals

Portable Data Terminals

The optional Stock Control module includes support for Denso BHT-6000/8000 Series and LynxScan Portable Data Terminals. These terminals can be used to collect stocktake, stock purchase and stock transfer data, to do price checks and to assign barcodes to items.

Programming Portable Data Terminals

Setup > Program Portable Data Terminals

Before you can use your portable data terminal to collect data it must be programmed correctly. An application program for Denso BHT-6000/8000 Series PDTs is included with Uniwell Lynx. For LynxScan PDTs the LynxScan application must be installed and licensed and associated software installed on the same PC as Uniwell Lynx. The following options are available when programming portable data terminals:

COM Port	COM port that will be used to program the Portable Data Terminal. (COM1 to COM4)
Baud Rate	Baud rate for programming the Portable Data Terminal. (Fixed at 19200 when doing Send Items)
Send Program	Sends the executable program to the Portable Data Terminal. ***Note****: Only applicable for Denso BHT-6000/8000 Series PDTs.*
Send Items	Sends item codes and descriptions to the Portable Data Terminal for verification purpose when collecting data.
Include inactive items	By default inactive items are not sent to PDTs. Use this option to include inactive items.
02 embedded PLU settings	These settings are sent to Denso BHT-6000/8000 Series PDTs only. Based on these settings when 02 embedded PLU barcodes are scanned the entry is stored using just the embedded PLU code rather than the full barcode.
Price Level for Price Check	The selected price level will be sent to the PDT and used for the Price Check feature.

Part 12

Managing Data Files

Managing Data Files

Uniwell Lynx includes support for multiple data files. Uniwell Lynx data files have a .LNX file extension. While you are using Uniwell Lynx the filename and size of the data file you have open is displayed in the shortcut bar on the left side of the screen. Uniwell Lynx includes a number of features that can help you to manage your data files.

Important*: The maximum size for a Uniwell Lynx data file is 2GB. (This limit does not apply to Uniwell Lynx Enterprise databases.) Warning messages are displayed automatically when your data file approaches the maximum size. Your data file size can be reduced by archiving or purging data and then optimising the data file.*

Backing Up Data Files

File > Backup Data File

It is highly recommended that you backup your data files on a regular basis. This will reduce any loss of data in the event that your computer system experiences some sort of failure resulting in the loss or corruption of your data file. When you click **Proceed**, all open windows in Uniwell Lynx will be closed and you will then be prompted to select a folder and filename for the backup file.

Include Log and Tmp Files

Uniwell Lynx stores log and temporary files in a special sub-folder. At times these files may be needed by your Uniwell Lynx dealer to diagnose a problem with your system or to recover sales data that has been deleted from your data file. This option will include these files while backing up your data file.

Note*: As this option may drastically increase the size of your backup files you should only use this option if instructed to do so by your Uniwell Lynx dealer.*

Include PRG Files

This option can be used to include your linked PRG files while backing up your data file.

Restoring Data Files

File > Restore Data File

In the event that your computer system experiences some sort of failure resulting in the loss or corruption of your data file you can use the Restore Data File function to restore from a backup file if one exists. When you click **Proceed** all open windows in Uniwell Lynx will be closed and you will then be prompted to select the backup file to be restored. If a valid data file is found in the backup file then you will be prompted to choose a folder and filename for the restored file. When you close the Restore Data File dialog you will be prompted to choose the data file you want to open.

Optimising Data Files

File > Optimise Data File

To ensure optimal performance, you should optimise your data files on a regular basis. When you click **Proceed** all open windows in Uniwell Lynx will be closed and your data file will be optimised.

Archive Data

File > Archive Data

As the information stored in your Uniwell Lynx data file increases over a period of time the file will continue to grow in size and eventually this will affect performance. To reduce your file size, you can archive old data that you do not need to access on a regular basis. After clicking **Proceed** you will be prompted to select a folder and filename for the archive file. All transactions prior to the date selected will be transferred to the archive file and then your current data file will be optimised. To access the archived data simply open the archive file as you would any other Uniwell Lynx data file.

Hint*: To avoid any confusion between your current data file and any archive data files you can change the color scheme in your archive data files to provide a visual feedback when an archive data file has been opened.*

Note*: Scheduled jobs are not transferred to the archive file and the Connection parameter for each of your POS terminals will be set to 'None' in the archive file.*

Purge Data

File > Purge Data

Purge Data permanently deletes data from your data file and should be used with caution. After purging data it is recommended that you Optimise your data file to reduce its size. The following options are available when purging data:

ALL Transactional Data and Totals	All sales/stock/supplier/customer transactions, sales batches, balances, stock levels, deposits and logs.
ALL Stock/Supplier Transactions/Balances/ Levels	All stock/supplier transactions, balances and stock levels.
Electronic Journal up to ...	Electronic journal data up to the specified date except for any customer transactions.
Communications Log up to ...	All communications log data up to the specified date.
User Log up to ...	All user log data up to the specified date.
Barcodes that have not been used since ...	All active barcodes that have not been used since the specified date. Note: Barcodes that have never been used are not deleted.

Import/Export Data

File > Import Data/Export Data

Groups, Items, Suppliers, Customers and Clerks can be imported or exported in tab-delimited or comma-separated formats. Export files can be created with or without a header record and you can choose which fields to export. Use the **Export updated records only** option to limit the export to items that have been edited since the last export. A header record and key fields must be included when importing data. During the import data process rejected records are written to a text file and an error column is added to the file to provide details of why the records were rejected.

Export Sales Data

File > Export Sales Data

Group Sales data and Item Sales data can be exported in comma-separated format.

Part 13

Export to Xero Add-On

Export to Xero Add-On

The optional Export to Xero Add-On allows sales and purchase data to be exported in a CSV format suitable for importing into Xero.

Export to Xero Setup Overview

The steps required to setup the Export to Xero Add-On are listed in the following table:

Link your Tax Codes to Xero Tax Codes	Assign Xero Sales and Purchase Tax Codes **(Setup > Tax Codes)**
Link your POS terminals to Xero Customers	Assign Xero Customers to your POS terminals (**Data > POS terminals**) ***Note****: You do not need to use a separate Xero customer for each POS terminal. Multiple POS terminals can be linked to the same Xero customer if required.*
Link your Groups to Xero Accounts	Assign Xero Sales and Purchase Accounts to your Groups (**Data > Groups**)
Set the Xero Export Folder and Xero Freight Account	**Setup > Preferences**

Export Sales to Xero

File > Export to Xero > Sales

Group sales data can be exported in a CSV format suitable for importing into Xero by sales batch. Each sales batch that you process will produce a Sales Invoice in Xero. It is important to note that only sales information is transferred to Xero. Payments should be entered manually into to Xero after the takings in drawer have been balanced. Any discrepancies between the group sales and actual takings should be adjusted directly in Xero.

The Export Sales to Xero grid displays batches that have not yet been exported. Select the required batches and click **Ok**. After the export has been completed, login to your Xero account to import the CSV file that was exported.
Important: *The amounts in the export file are tax inclusive so you must choose the 'Tax Inclusive' option in Xero when importing.*

Export Purchases to Xero

File > Export to Xero > Purchases

Purchase data can be exported in a CSV format suitable for importing into Xero by supplier invoices. Invoice lines are exported by group. It is important to note that only purchase information is exported to Xero. Supplier payments should be entered manually into to Xero.

The Export Purchases to Xero grid displays supplier invoices that have not yet been exported. Select the required invoices and click **Ok**. After the export has been completed, login to your Xero account to import the CSV file that was exported.
Important: *The amounts in the export file are tax inclusive so you must choose the 'Tax Inclusive' option in Xero when importing.*

Part 14

ALM Invoices Add-On

ALM Invoices Add-On

Stock > ALM Invoices

The ALM Invoices Add-On provides support for importing ALM electronic invoice files*. Invoices that have been imported but not yet processed in to Stock Purchases are displayed in the ALM Invoices grid.

***Note**: Invoice files must be ALM's Version 5.5 format. Later versions of ALM's electronic invoice files are not supported.*

Importing ALM Invoices

To import an ALM electronic invoice file click the **Import** button, select the Supplier and Location then click **Import** and locate the invoice file. Follow the instructions displayed on the dialog to process the imported invoices in to Stock Purchases. As per those instructions, select an imported invoice in the grid, click **Modify** , check the invoice and then click **Record** to process it in to Stock Purchases. Repeat this process for each imported invoice. After they have been processed your imported ALM invoices can be viewed in the Stock Purchases grid (**Stock > Stock Purchases**).

Unknown Items

If any of the invoices in the file contain items that do not exist in your Uniwell Lynx data file then a list of the unknown items will be displayed. The unknown items must be created in your data file before you will be able to import the invoice file. Click the **Print** button to print a list of the unknown items. After creating the unknown items you will need to import the invoice again.

Part 15

NDP Link Add-On

NDP Link Add-On

Communications > NDP Link

The NDP Link Add-On provides support for sending item data to ACOM NDP software (Version 5.2.8 or 5.3.1). Choose the Price Level to send to NDP and then click **Proceed**. All of the 'Send to NDP' items in your Uniwell Lynx data file will be copied into your current NDP data file. For each item the PLU Code, description and sell price fields are copied to NDP.

'Send to NDP' Items

To tag an item to be sent to NDP go to **Data > Items**, select the item in the grid, click **Modify**, go to the **Other** tab, tick the 'Send to NDP' checkbox and then click **Ok** to save.

Part 16

Ishida Link Add-On

Ishida Link Add-On

Communications > Ishida Link

The Ishida Link Add-On provides support for sending item data to Ishida Scales. Choose the Price Level to send to Ishida Scales and then click **Proceed**. All of the 'Send to Ishida' items in your Uniwell Lynx data file will be exported to a text file (Ishida.txt) for import into your ScaleLink Pro software. After the export file has been produced the batch file Ishida.bat will be executed if it exists. The Ishida.bat must be in the folder where Uniwell Lynx is installed and can be used to execute a ScaleLink Pro command to automatically import the Ishida.txt file.

'Send to Ishida' Items

To tag an item to be sent to Ishida Scales go to **Data > Items**, select the item in the grid, click **Modify**, go to the **Other** tab, tick the 'Send to Ishida' checkbox and then click **Ok** to save.

Part 17

CAS Link Add-On

CAS Link Add-On

Communications > CAS Link

The CAS Link Add-On provides support for sending item data to CL-Works software V2.93.0 (UN). Choose the Price Level to send to CL-Works and then click **Proceed**. All of the 'Send to CAS' items in your Uniwell Lynx data file will be copied into your current CL-Works data file. For each item the PLU Code, description and sell price fields are copied to CL-Works.

'Send to CAS' Items

To tag an item to be sent to CL-Works go to **Data > Items**, select the item in the grid, click **Modify**, go to the **Other** tab, tick the 'Send to CAS' checkbox and then click **Ok** to save.

Part 18

Automatic Item Sales Export Add-On

Automatic Item Sales Export Add-On

The Automatic Item Sales Export Add-On provides support for exporting item sales to CSV files automatically whenever sales batches are processed. To enable the automatic export go to Setup > Preferences > Backup/Programs, tick either the 'Export item sales to text file (ddmmyyyyMMMBBBB.txt) automatically during Process Sales' checkbox or the 'Export item sales to text file (ddmmyyyyLLL.txt) automatically during Process Sales' checkbox, and enter the required 'Item sales export folder'.

The automatic item sales export will be executed whenever a sales batch is processed. The export file will be saved to the specified folder and will contain item sales for the terminal or location and date of the sales batch. The filename of the export file will be ddmmyyyyMMMBBBB.txt where ddmmyyyy is the sales date, MMM is the machine number and BBBB is the branch number or ddmmyyyyLLL.txt where ddmmyyyy is the sales date and LLL is the location number. The export file is a CSV file with the following header line:

ItemCode,Description,Quantity,Amount

Part 19

Labour Cost Reporting Add-On

Labour Cost Reporting Add-On

The Labour Cost Reporting Add-On adds the following report and required maintenance options to Uniwell Lynx.

Hourly Labour Cost Report

The Hourly Labour Cost report can be accessed via **Sales > Sales Reports**. It provides a breakdown of the labour costs by hour compared to sales by hour. The data on this report is drawn from the Hourly Sales and Attendance reports. Labour costs are calculated based on the wage rates specified for each Job Code **(Data > Job Codes).** Clerks can be assigned to 'Back of House' or 'Front of House' **(Data > Clerks)**.