TUXSHOP

Users Guide

TuxSoft
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Contents

Introduction

TuxShop is a modern point of sale and shop management application, that is supported on **Linux(tm)** and **Micosoft Windows**(tm). It is feature packed yet still manages to provide an interface that is as simpler than a cash register to operate. As your business grows you will need a solution that will grow with you. With TuxShop you get a choice of using a touch screen interface or the traditional keyboard interface, and indeed it is possible to use both !

In addition Linux support offers reliability,stability and long term support at levels most people can't imagine, scaling with thin clients keeps hardware costs to a minimum. Mixing of Windows and Linux or a Linux only or Windows only environment is also supported.

A comprehensive selection of reports will assist you with the management of your business.

Support

Via E mail at info@tuxsoft.co.za Be sure to include your support details in your email. In some areas you may have telephonic support.

Bugs

You can send all bug reports to info@tuxsoft.co.za via email. Users with a valid support option will get a reply and a projected fix time rapidly, and yes we call problems bugs, we fix bugs !

1 Installing TuxShop

1.1 Computer Requirements

Operating System	UBuntu 18.04 or 20.04 LTS/ Microsoft Windows
Processor	AMD Ryzen / Intel i3 - Or better
Memory	1GB Min, 4GB or more recomended
Display	1024x768 Minimum / 1280x1024 recomended
Network	100Mbit or better

In addition the usual peripherals such as mouse, cdrom, etc. are required. The above specifications may be replaced with higher performance hardware at your leisure.

1.2 Windows Installation

Simply insert the TuxShop CD into your CD-Drive. The TuxShop installer should start automatically, if not your windows installation is not standard and you should have the skills to start the install. If not contact your system administrator. Note that throughout this manual the TuxShop directory refers to the ***C:\Program Files\TuxSoft*** folder. In addition wherever you see the path **/opt/tuxsoft/** you should replace this with ***C:\Program Files\TuxSoft*** if you are running 64Bit Windows use ***C:\Program Files (x86)\TuxSoft***

1.3 Linux Installation

Most modern Linux distributions support some form of automount, and as such the installer should just start. You will need to know the root password, if not your system admin will need to do the install. We recommend that you use the KDE environment. Note that throughout this manual the TuxShop directory refers to the ***/opt/tuxsoft*** directory . In addition wherever you see the path folder ***C:\Program Files\TuxSoft*** you should replace this with ***/opt/tuxsoft***

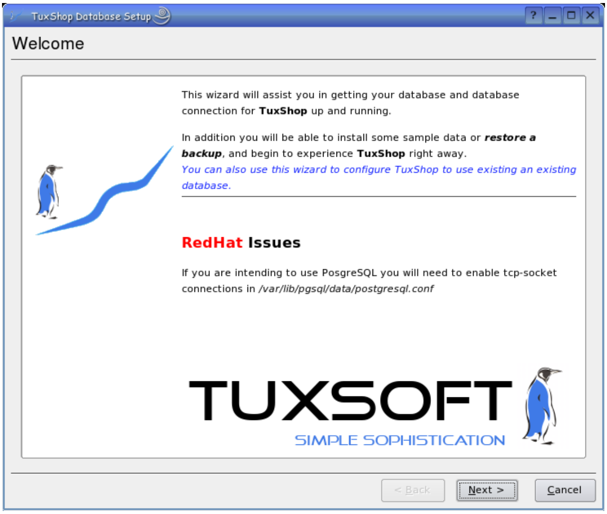
Creating a Database

In most cases before you create a database it is necessary to install a SQL database server, you may choose to use the SQLITE option, if you will run a single Linux or WindowsPC. With Linux it will be possible to use multiple stations if using thin clients. Supported database servers are MySql, Postgresql, and most ODBC interfaces.

You can obtain a copy of MySQL for Windows from http://www.mysql.com/ or from the contrib folder on the CD. **We recommend you use a Linux server running MySQL.**

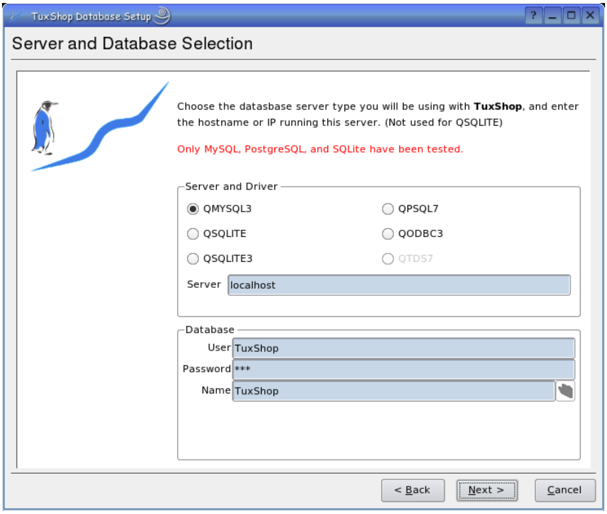
After installation you should find a **dbTuxShop** entry in your system's start or K menu. The **dbTuxShop** utility is used to configure and populate a database for TuxShop.

Figure 1.1: Database Setup Page 1



The first page in the dbTuxShop wizard will inform you of any special requirements or useful information relating to your server type.

Figure 1.2: Database Setup Page 2

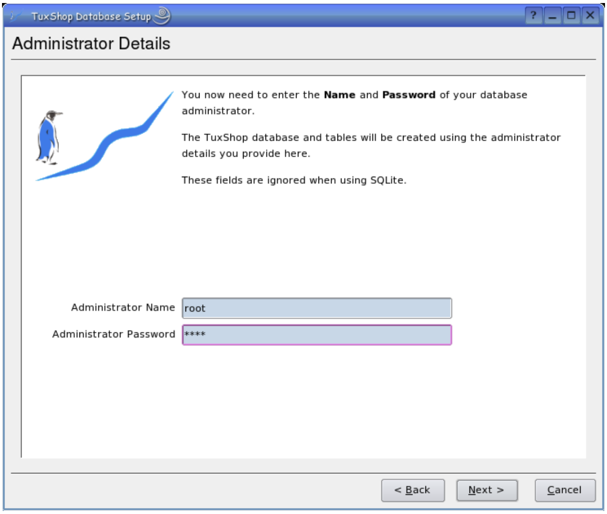


On page two you can select your server type, host, Database user name, Database user password, and database name. Not all database servers support password protection, this is especially true on windows platforms. When using SQlite the database name is a physical path to the database file. Make sure you have permissions to read and write to the location you choose.

When installing under Windows 98 you must use your computers name. With windows XP you must use localhost or the physical IP of your PC.

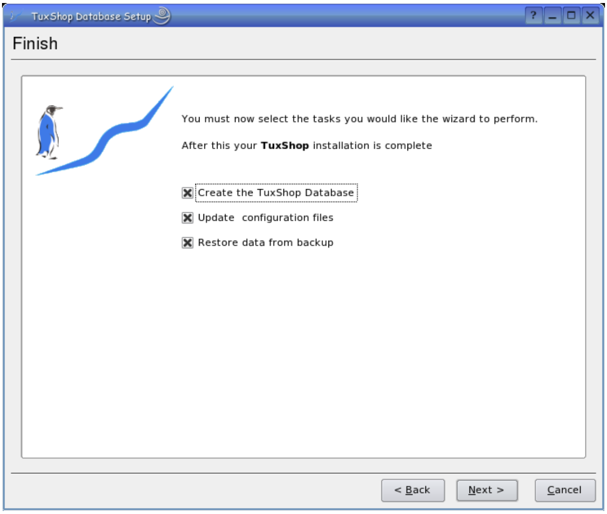
Linux makes use of any valid name or IP address.

Figure 1.3: Database Setup Page 3



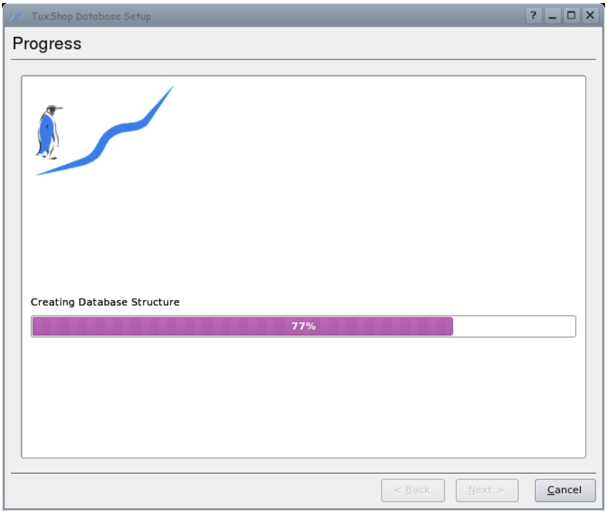
In most cases you will need to supply a name and password for your database administrator. ***This is usually NOT the system root password.***

Figure 1.4: Database Setup Page 4



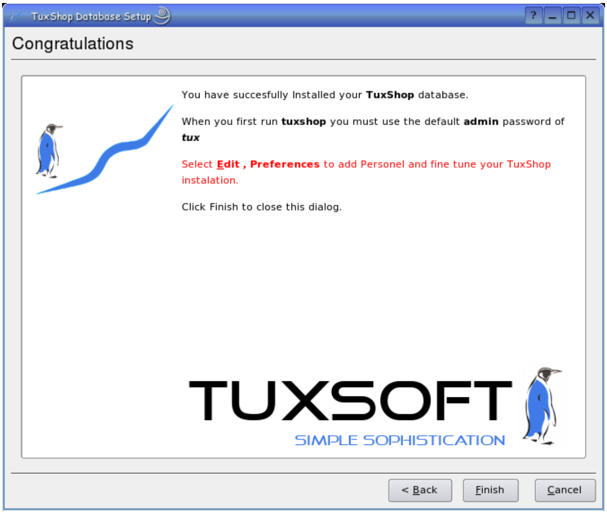
You may use the dbTuxShop utility to restore a backup of your database, or you can populate it with sample data from the backup samples provided. When you first install TuxShop it might be a good idea to populate it with sample data so that you may learn and play with the system before committing to a running live system.

Figure 1.5: Database Setup Page5



An indicator showing the progress of the create and populate phase is shown, the actual time depends on the type of server and size of your database.

Figure 1.6: Database Setup Page 6



You are now ready to run TuxShop, you need to take note of the Admin password if this is an empty or sample data install.

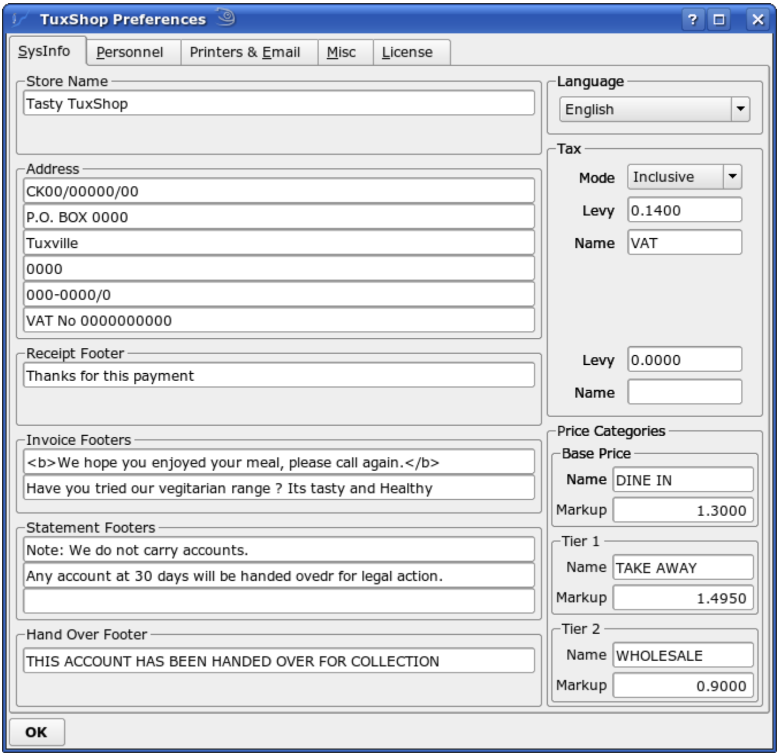
1.4 Starting TuxShop

You can start TuxShop from the TuxShop menu in the KDE or Windows start menu. In most cases there will also be an icon on your desktop that will start TuxShop. When running TuxShop for the first time you will need to log in as the Admin using the login code of ***tux*** this can be changed using the **Edit** -> **Preferences** menu.

2 Preferences

2.1 SysInfo

Figure 2.1: SysInfo Page



The System Information page is used to configure your business details, tax settings, and footers for various customer documents.

Facility is provided for two tax levies in either Inclusive or Exclusive modes. If a tax levy does not exist simply leave its name blank and its value at 0.0000 and TuxShop will ignore it.

Your License or Lease is linked to the first line of your address. This must be the trading name of your business, if this changes you will need a new License or Lease key.

As can be seen for the sample data it is possible to use trivial HTML markups in the footer fields to achieve a more dramatic effect.

Language - the GUI and documents may use a specific language catalogue. See the section on customisation for more information on creating a new language.

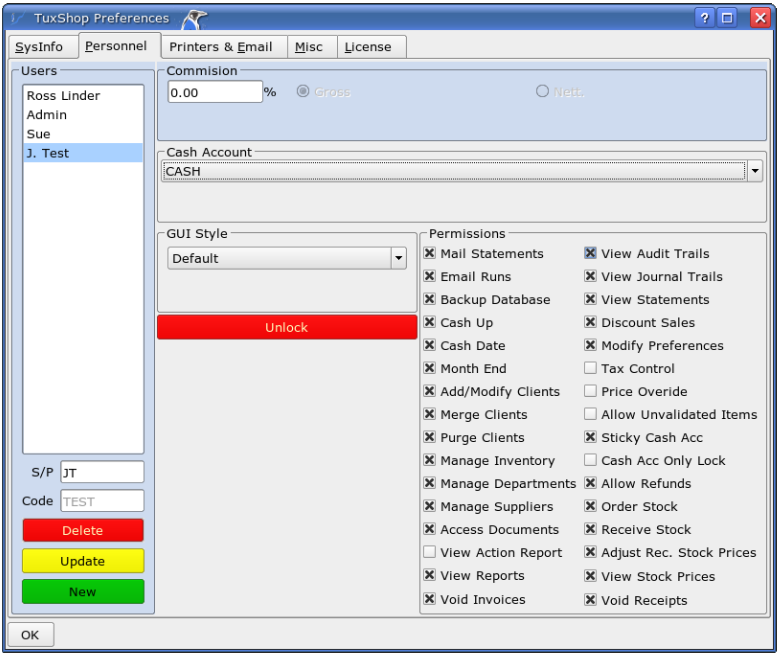
Price Categories - TuxShop supports up to three price tiers, you may name these as you desire, and set the default markup for each tier or category. If the tier name is left blank it Will not be available in sales operations.

Discount Matrix -

2.2 Personnel

The Personnel page is used to add and manage personnel and their privileges within TuxShop.

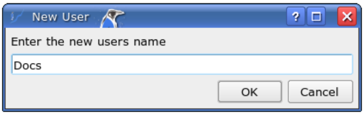
Figure 2.2: Personnel Page



When you first run TuxShop there will only be the Admin personnel entry. Admin can not be deleted, however you should change the Admin password. To do this simply type in the new password into the **Code** field then click on the yellow **Update** button.

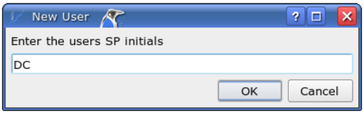
The next task will most likely involve adding a new personnel entry. To do this click on the green **New** button. You will be presented with a sequence of prompt dialogues as follows.

Figure 2.3: New User Name



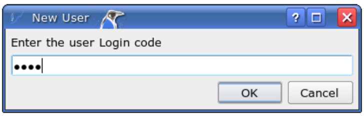
The name you enter for the new user is the name that will be shown in the Personnel users list and in the action log.

Figure 2.4: New User Initials



The initials are used in the Sales page to identify the sales person and calculate any commission on sales.

Figure 2.5: New User Code



Lastly you will enter the users code. This is the code the user will use to login to TuxShop, all preferences and settings are linked to the users code.

After adding a new user to personnel you can fine tune the various preferences allocated to that user. These are described in more detail here.

1. **Commission** - this value specified in percent is used to accumulate commission on sales and applied to the pre-tax amount.

2. **Cash Account** - In some cases it may be desirable to have a given user associated with their own cash sales account. This would be needed if your installation has more than one POS terminal. Cash accounts must start with the word CASH in the account name !
3. **GUI Style** - This is just a modern day graphical gimmick, eye candy to waste CPU !
4. **Mail Statements** - Checking this option will enable the user to print or email statements to all customers with a debit balance.
5. **Email Runs** - This option should be disabled as it is not yet implemented.
6. **Backup Database** - Checking this option will enable the user to create backups of the TuxShop database.
7. **Cash Up** - Checking this option will enable the user to perform the daily cash up and / or view the current cash situation.
8. **Month End** - Checking this option will enable the user to print out a month end report.
9. **Receive Stock** - Checking this option will enable the user to accept stock and enter it into the system.
10. **Adjust Rec. Stock Prices** - when checked the user will be able to adjust prices of items when stock is received.
11. **Purge Clients** - Checking this option will enable the user to purge a customers account. All records will be removed from the system, you will have an option to produce a printout for back reference.
12. **Merge Clients** - Checking this option will enable the user to merge two customer accounts into one. Useful when couples get married, or when names differ slightly and two or more

accounts have been created for the same customer. For example ***Byte and Pieces***, and ***Bytes and Pieces CC***.

13. **Manage Merchandise** - Checking this option will enable the user to add and edit Merchandise that you stock.
14. **Manage Services** - Checking this option will enable the user to add and edit Services that you perform.
15. **Manage Suppliers** - Checking this option will enable the user to add and edit suppliers known to your company.
16. **Order Stock** - Checking this option will enable the user to activate the stock level and ordering process.
17. **View Reports** - Checking this option will enable the user to view any of the available system reports.
18. **View Audit Trails** - Checking this option will enable the user to view and print a complete audit trail of a given account, any notes will be shown in this trail.
19. **View Journal Trails** - Checking this option will enable the user to view and print a journal trail for a given account.
20. **View Statements** - Checking this option will enable the user to view and print a customers statement.
21. **Discount Sales** - Checking this option will enable the user to discount invoiced items.
22. **Modify Preferences** - Checking this option will enable the user to do anything.
23. **Tax Control** - Checking this option will enable the user to enable or disable tax levies on a item to be invoiced.
24. **Price Override** - Checking this option will enable the user to override the price of an item that was retrieved from the database.
25. **Allow Unvalidated Items** - Checking this option will enable

the user to invoice items not in the database, to be effective the user also needs price override and tax controls.

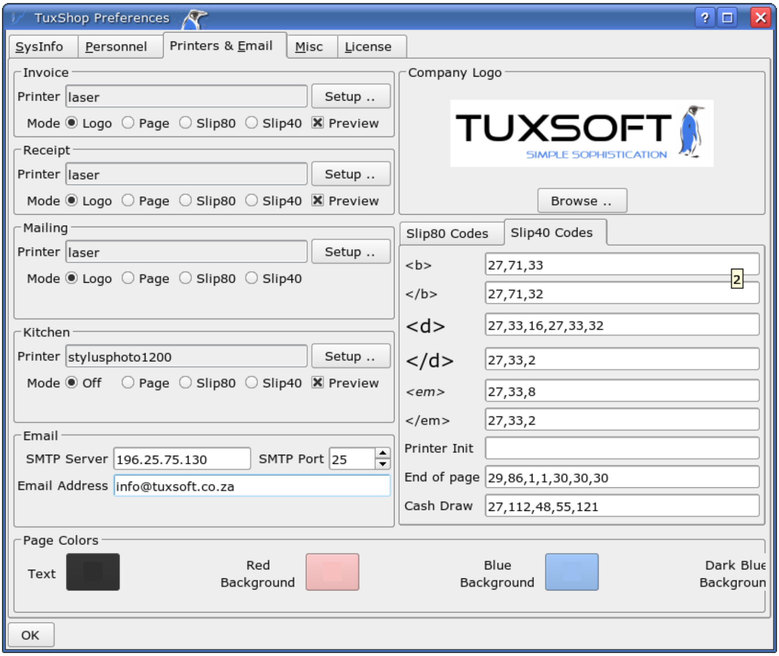
26. **View Action Reports** - Checking this option will enable the user to view and clear the action log. The action log contains a history of any operation the user performs that is not normal operational procedure.
27. **Cash Acc Only Lock** - Checking this option will lock the system to use only the cash account associated with this user. Typical applications might be cash only take away food vendors.
28. **Sticky Cash Acc** - Checking this option will make the default account the cash account associated with the user, however the user will still be able to select a client if needed.
29. **Refunds** - Checking this option will enable the user to accept returned goods for refund.
30. **Access Documents** - Checking this option will enable the user to view and manipulate the Documents page.
31. **Void Invoices** - when checked, the user will be able to void an Invoice.
32. **Void Receipts** - Checking this option will allow the user to void a receipt.

When changing the active user settings the changes will become effective after a second or two. Language and style changes should be immediate.

2.3 Printers & Email

TuxShop currently uses three printers. Physically these may all be the same printer or multiple printers at various locations.

Figure 2.6: Printer and Email Settings



The Invoice, Receipt and Kitchen printers are self explanatory and used to print Receipts and Invoices. When enabled the Kitchen printer can be used to create order slips for your kitchen is applicable. The mailing printer is used to print all other customer documentation. Typically these documents would be posted to your customers.

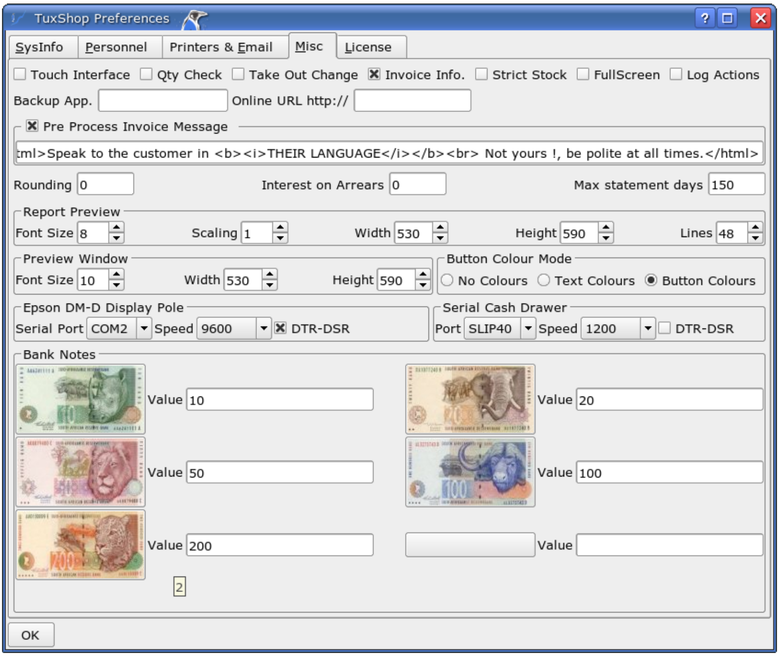
You may also choose to use a logo in your documents, you should only choose logo's that are of a reasonable size. The actual printer configuration is system dependent, but should be familiar to most people.

In order to email documents to customers you need to be able to connect to a SMPT server, the Email settings allow you to choose the server and port number to connect with. TuxShop can not keep mail spooled waiting for an SMTP server. To use email the server must be on-line.

2.4 Misc

The Miscellaneous page contains settings for the backup media writer and the selections of fast cash banknotes. Bank notes can be used to speed up and reduce errors in the receipt process.

Figure 2.7: Misc



By checking the **Show Touch Interface by Default** check-box, the sales page will start in touch screen mode, if unchecked the keyboard interface is shown by default.

When the **Qty Check** option is checked, the quantity field in the sales keyboard page will automatically get focus and highlight after an item is scanned or located in the Item combo box. This is useful in businesses where the quantity of items is often not 1.

When the **Take Out Change** option is checked, a dialogue prompting you for change provided is presented when the invoice is processed. This allows a note to be added to the Invoice that is useful for take out orders where change is sent with the delivery.

When the **Invoice Info** option is checked, a dialogue allowing you to enter additional info to be displayed under the account name is presented when the invoice is processed. This is typically used to add customer details or delivery instructions to cash sales.

Whet the **Strict Stock** option is checked items can only be vended/sold when there is a sufficient quantity in stock.

When the **Full Screen** option is checked the interface will be run in full-screen mode without window decorations, usually preventing the operator from accessing the operating systems task bar and menus.

When the **Log Actions** option is checked, all actions and operations are logged into a system log file that can be viewed from the reports menu. If checked it is important to view and clear this log on a regular basis as the size of the log grows rapidly.

The **Backup Media App**. can be any command that will take a file and write it to a backup medium. The %1 is replaced with the backup file name you specify at backup time.

The **Online URL** is the URL used to update your online store stock levels and prices, for more information on this contact TuxSoft.

Bank Notes can be changed simply by clicking on the note or empty button, the Value field contains the value associated with the note.

Rounding allows you to round down your invoices to the nearest cent in rounding value. For example to round to 10c intervals use 10, to round to the nearest Rand use 100

Interest on Arrears select the interest rate in % for account in arrears.

Max statement days will determine the number of days an account goes overdue before statements are no longer automatically mailed.

Report Preview panel provides settings to match your printer to the on screen display, you can change the font size and adjust the scaling to provide a display that is visually acceptable on screen as well as on the printout.

Preview Window panel provides settings to change the size of the text on your preview and printouts , as well as adjust the preview windows for optimum size on screen.

Button Colour Mode panel if you are using windows Xp, you will most likely want to use the Text Colours option since Xp does not support colours in buttons. For all other platforms choosing button colours will most likely be your best option. This is however a personal preference and does not affect the operation of TuxShop.

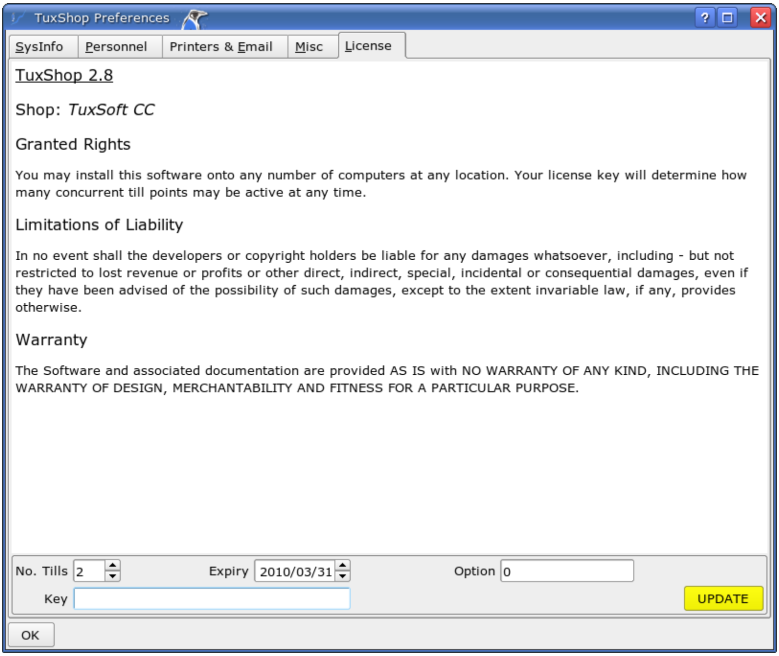
Epson DM-D Display Pole these settings determine how a display pole, if any, is attached to the system.

Cash Drawer these settings determine how a simple serial cash drawer, if any, is attached to the system.

2.5 License

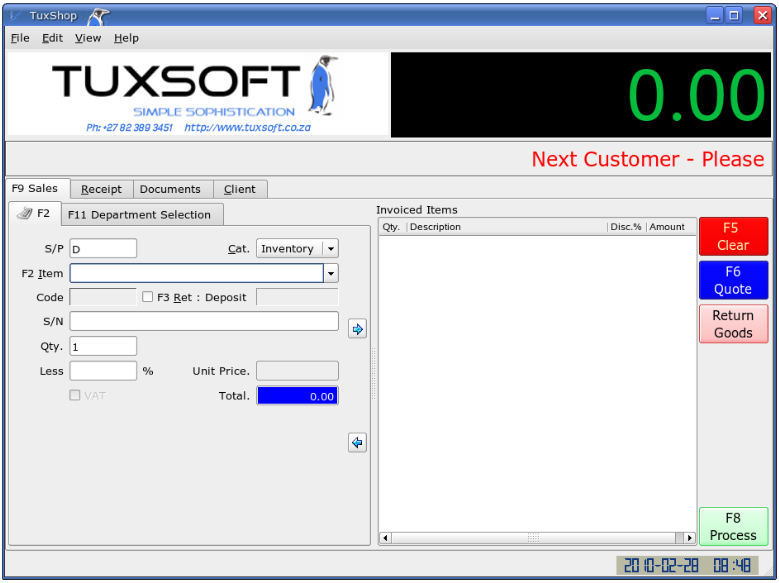
The license page provides fields where you can enter your number of tills and license key information. Once a valid key is entered the 3 customer limit and watermark on printouts will be removed.

Figure 2.8: TuxShop License



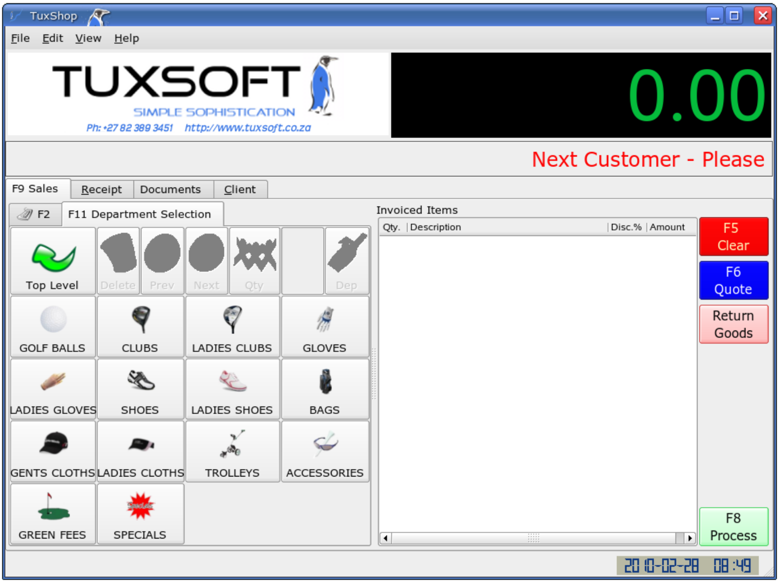
3 Basic Operation

Figure 3.1: Basic Keyboard Interface



In this chapter we describe the basic operation of TuxShop from the moment a customer walks in your door till they leave after paying. If your business is a cash only business you might consider using the **Cash Only Lock** preference.

Figure 3.2: Touch Screen Interface



3.1 Sales

In the Name field you can fill in the customers name or part thereof. Focus can be changed to the name field using **F1**, Thats pressing the F1 key.

After entering the name or part thereof press **Enter** if a match is found it will be displayed in the combination box. If more than one match occurred, pressing **F4** will drop down a list of available matches. If using our sample data try **D** you should get a match of **D. DUCK'O**

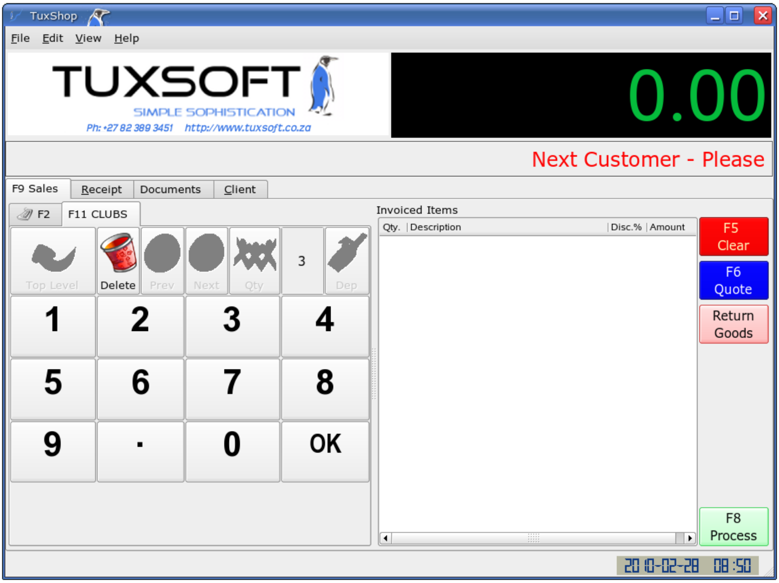
Now you are ready to invoice, select the item field in sales by pressing **F2** and then type **GREEK** followed by **Enter** as we would like to add a GREEK SALAD to the invoice. Either press **Ctrl+A** or click the **Add** button, you can also just press **Enter**, the Quantity field will then have focus, you can change the quantity if required, pressing enter again will add the item. ***Note that if the Check Qty. option is not set in preferences, the system will automatically add one unit to the invoice when Enter is pressed bypassing the quantity field, this is commonly used with bar code scanner systems.***

This behaviour can be changed in preferences in the Misc section by checking or unchecking the **Qty Check** button. When unchecked, enter will add a single item immediately as was the case in Version 2.0 and before.

Next we would like to add a Californian pizza to our Invoice, this time however we will use the product code, type 35 and press **Enter**.

To change the quantity of items to sell on the touch interface, touch the quantity button then the required number of items. The delete button will erase the last digit entered. The quantity can be seen in the Quantity indicator on the right of the Qty. button. Once correct press the OK button, then choose the product button.

Figure 3.3: Quantity editing on the Touch Interface



We can now process our invoice by clicking on the green **Process** button or by pressing **F8** our invoice is presented for printing.

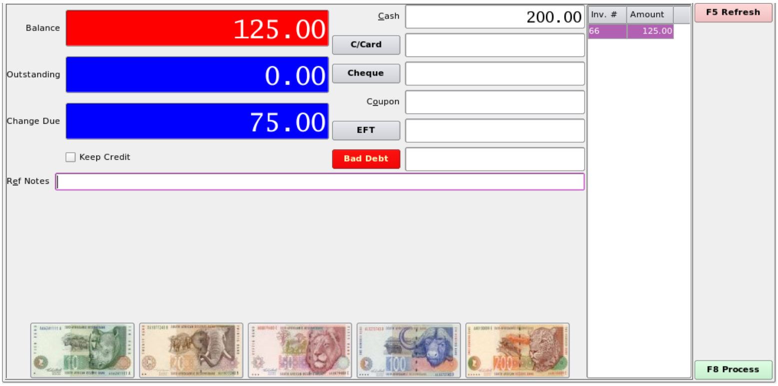
Should we have enabled the Take Out Change option the following dialogue will be presented where we may enter an amount for change to be provided for. Leving the amount as 0 or by selecting cancel will not add a change note to the invoice.

Figure 3.4: Change For Dialogue

When the Invoice preview is presented, assuming previews are enabled, choosing any option on the Preview other than **Close** will process the invoice into the system. The Receipt page will automatically raise in anticipation of payment.

3.2 Receipt

Figure 3.5: Receipt Page



If enabled you can use the fast cash bank notes to enter an amount responding to the physical bank notes tendered by the customer. You can also fill in amounts by hand, if payment is made by Cheque or Credit Card the exact amount owing will be filled in when the payment type option is selected. In addition a further field will become enabled to allow you to enter the cheque or card number.

When a return for refund is processed, the amount tendered field will contain a negative value indicating the value to be refunded to the customer. If you would like to leave the amount as a credit in the account you can simply ignore the Receipt phase, press **Ctrl+L** to clear and return to Sales

If the client would like to leave the change as a credit or you receive a deposit (down payment) then simply check the **Keep Credit** option, this will leave the account in credit and set the change due to 0.00

You may also choose to ignore certain invoices when receiving payment. To do select only the applicable invoices in the selection list as you do this the amount owning will change to reflect the new selection. By default all invoices are selected.

When ready you can click the green Process button. After accepting the presented document the system will clear and again be ready for sales.

4 Advanced Operation

4.1 Sales

Depending on the preferences settings it may be possible to alter the selling price, whether tax is applicable on an item, and to apply discounts. All these features are self explanatory. You can also change the Department selection, two special cases exist for Notes and Remarks, Notes are private and will only appear in audit trails and are intended for your personal records. Remarks are printed on the Invoice and intended to inform the customer to related information.

4.1.1 How Item searching works

The Item field is a very versatile tool, you can search for products by name, part thereof, or item code. When more than one product matches the description you can drop down a list of matches or scroll through the list using the arrow keys. When scrolling through the list the item code indicator will update with each items product code.

When connecting a bar code scanner to your system, you should program your scanner to append a ***CR*** (carriage return) to the end of the bar code, this will have the effect of automatically adding the item to your invoice. To add multiple items of the same type, first enter the quantity then press **F2** and finally scan the product. You can also choose to always verify the quantity by checking the **Qty**

Check option in Misc preferences.

Items can be added to the Invoice by pressing Enter or using the **Ctrl+A** accelerator, likewise items can be removed from the invoice by highlighting the required item then using the **Ctrl+R** accelerator. The Add and Remove buttons may also be used.

4.1.2 Closing an Invoice temporarily

Sometimes it may be desirable to close an invoice temporarily, this might be in a restaurant type environment or perhaps a repair or contractor scenario. You would most likely use the clients account or in a restaurant the table account name. Simply process sales as usual, when you are presented with the Invoice for printing, select **Close**, next use **Ctrl+L** to clear the system ready for further transactions on any account. To add new items to an existing invoice, simple open the account and again process sales as usual. When the Invoice is presented for printing the new items will be appended. You can choose to close or process/print the Invoice. Once an Invoice has been printed or processed it is closed processed by the system and no further modifications may take place.

In some cases you may wish to edit the items already on a pending invoice, in this case simply click the **Edit** button and all the items will be placed into the sales page and removed from the system records, use the remove and add facilities to correct your invoice then process it again.

4.1.3 Serial Numbers

When invoicing items that have serial numbers, you can insert the items serial number into the S/N field. You can then use the **Edit**

-> **Search on S/N** .. facility to locate the invoice that had the corresponding serial number. This is useful for warranty claims etc.

4.2 Receipt

The receipt process is simple, but we mention a few points that you may overlook.

1. Always choose the Payment by method first, this will usually automate the filling in of the rest of the required fields excluding Cheque or Credit Card no.
2. When using the fast cash bank note facility, pressing subsequent notes add their value to the amount tendered field.
3. Remember you can use **Alt+C** to get focus to the cash amount tendered field, and **Alt+O** to get focus on the coupon amount field. Clicking the other payment option buttons will fill in the default payment amount from the selected source. It is possible to accept payment from multiple sources.
4. When an account is in credit you may simply skip the receipt process and press **Ctrl+L** to clear and ready the system for new transactions.
5. To leave items on account skip the receipt process and press **Ctrl+L** to clear and ready the system for new transactions. The accounts will printed/mailed with the **File** -> **Mai**l -> **Statements** facility, usually done at month end.
6. Bank note setup is done using the Preferences dialogue.

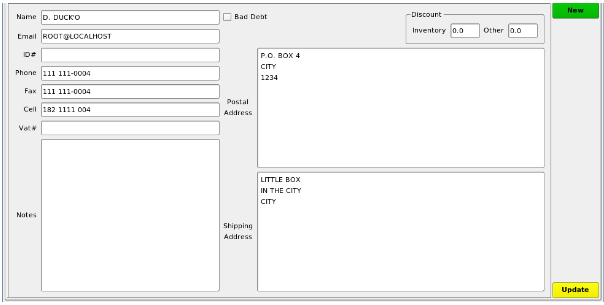
4.3 Documents

The documents page is used to view past documents associated with an account. You can view Invoices, Receipts, Quotes, and Refunds. Simply highlight the document you wish to view and click the appropriate colour coded button.

4.4 Client

The client page is used to add customers and/or update their details, the discount fields will not be editable unless the user has discounting privileges.

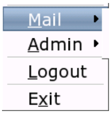
Figure 4.1: Client Page



In addition the Client page may be used to search for customers using any of the available fields. For example to locate all customers who have a 5% discount simply enter 5 in the associated discount field then press **Ctrl+F** or use the **Edit -> Find** menu option. You may also use the wild card % character, for example to locate all customers who have 5 or 5.x use 5%.
You can use the % wild card in may ways, for example to find all clients who have phone numbers like xxx 375 xxxx or 375 xxxx or 375x xxx the key would be to locate phone numbers containing 375 so we would use %375%
The wild card character is extremely useful when searching addresses and notes.

5 The File menu

Whenever a letter is shown as **Underlined** a simple key press will select that menu option.



5.1 Mail

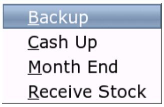
5.1.1 Statements

Using this option will search through the system for accounts with outstanding balances and compile statements for mailing. Interest is calculated on overdue accounts, and long overdue accounts are printed with a hand over for collection warning. The collection message is configured in the SysInfo page**??** of the preferences dialogue.

5.1.2 Email

Currently this option is not implemented and should be disabled in the Personnel preferences.

5.2 Admin



5.2.1 Backup

This will back up your database to a specified file. Unlike your database server backup tool, the built in TuxShop backup may be restored using the dbTuxShop utility to any of the supported database architectures.

In addition the Misc preferences dialogue allows you to configure an application that will write this backup file to media. In the command the %1 will be replaced with the file name you choose for your backup.

5.2.2 Cash Up

The Cash Up facility is used to produce Invoice and Payment Summaries, Invoice Histories, Receipt Histories, and Receipt Summaries for your daily transactions. It can operate in Preview or Print mode. When operating in Preview mode, the reports are generated and can be viewed or printed however no housekeeping is done and the books remain open for further transactions.

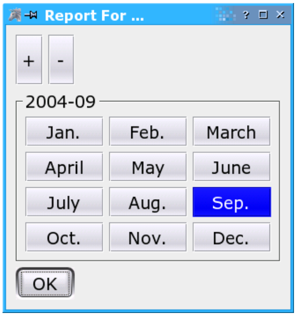
When print mode is selected, the reports are automatically printed for your Accounting records, the books are closed for the day and totals reset. In addition internally transactions are archived, this keeps TuxShop running fast and smooth for years and years. You may only notice delays when retrieving documents or searching for data that has been archived.

The Cash Up procedure should be run daily, or even at shift changes.

5.2.3 Month End

Month end reports can be generated for any month and year you require.

Figure 5.1: Date Selection



The following reports are generated. A Revenue Summary, this lists the number of clients per day, the total Invoiced, and Received as well as the average of these per client.

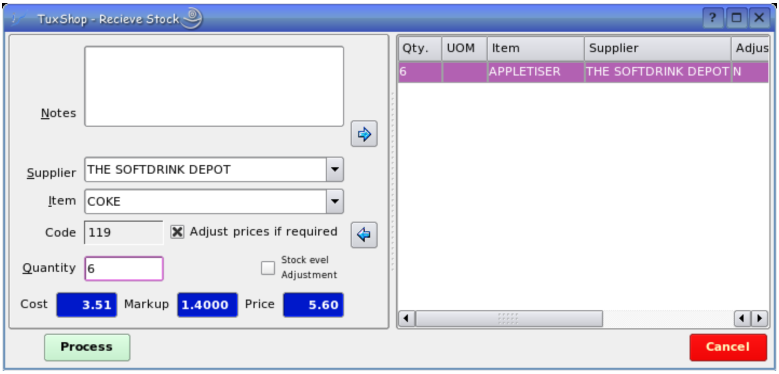
A performance Summary will indicate where your income is being generated.

A Tax or Vat Summary will give you a detailed tax report taking into account discounts, bad debt, arrears etc. In addition it reports the total and percentages of received payments by payment type.

5.2.4 Receive Stock

This option will present a dialogue where the operator can enter details of Stock accepted on delivery.

Figure 5.2: Receive Stock



The operation is simple and works in the same manner as the Sales page. The Notes field is only added when Process is clicked as these note refer to the delivery as a whole and not to a specific item. In most cases the supplier is automatically located. If you have more than one supplier supplying an item you should select the correct supplier in the supplier field.
The results of the Receive stock facility can be viewed using the reports option.

The Notes field is only added when Process is clicked as these note refer to the delivery as a whole and not to a specific item. In most cases the supplier is automatically located. If you have more than one supplier supplying an item you should select the correct supplier in the supplier field.

The results of the Receive stock facility can be viewed using the

reports option.

The Item field is a very versatile tool, you can search for products by name, part thereof, or item code. When more than one product matches the description you can drop down a list of matches or scroll through the list using the arrow keys. When scrolling through the list the item code indicator will update with each items product code.

When connecting a bar code scanner to your system, you should program your scanner to append a ***CR*** (carriage return) to the end of the bar code, this will have the effect of automatically adding the item to your invoice. To add multiple items of the same type, first enter the quantity then press **Alt+I** and finally scan the product.

Items can be added to the Invoice by pressing Enter or using the Ctrl+A accelerator, likewise items can be removed from the invoice by highlighting the required item then using the Ctrl+R accelerator. The Add and Remove buttons may also be used.

When making stock level adjustments you should check the **Stock Level Adjustment** box, this will allow you to enter negative quantities to cater for shrinkage or spoilage.

Depending on the users permissions they may be able to view and update prices and markups.

5.2.5 Cash Date

This produces the same reports as the CashUp function, however it allows you to choose the date of the day for the desired report. See Cash Up

5.2.6 Reset Sequence

Selecting this menu entry will reset the sequential number that can be used on orders. In most cases if you use the sequence number it would be reset daily.

5.3 Logout

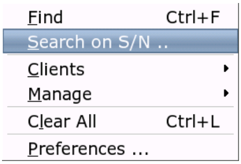
Activating the logout option will lock the system and prompt for a new user code. You should note that this is an application level control and has nothing to do with the system user login. Each users preferences and physical layout of the application will be restored when they log in.

5.4 Exit

Simply exits the TuxShop application, this can only be activated from within a valid session and not while the system waits for a login.

6 The Edit menu

Whenever a letter is shown as **Underlined** a simple key press will select that menu option.



6.1 Find Ctrl+F

The find facility is used to activate the search engine for customers. By default the Name field searched when Enter is pressed, all other fields need activation with this option. The most common use is to find clients based on account number or any detail in the Client page. For example to locate all customers who have a 5% discount simply enter 5 in the associated discount field then press **Ctrl+F** or use the **Edit** -> **Find** menu option. You may also use the wild card % character, for example to locate all customers who have 5 or 5.x use 5%.

You can use the % wild card in may ways, for example to find all clients who have phone numbers like xxx 375 xxxx or 375 xxxx or 375x xxx the key would be to locate phone numbers containing 375 so we would use %375%

6.2 Search on S/N

This facility enables you to locate an invoice containing an item with a specified serial number. Once located the matching invoice is displayed. Note the serial number search does NOT support wild cards.

6.3 Clients

6.3.1 Merge

This facility allows you to merge two account into a single account. For example Miss Swan marries Mr Gander, and now they would like a single account to Mr Gander. Perform the following actions.

Select Miss Swan in the name field, now use the Merge menu option, next select Mr Swan in the name field and again use the Merge menu option. Miss Swan's account will now be taken over by Mr Ganders account. Of course dialogues guiding you and confirming your actions will be presented as you proceed.

6.3.2 Purge

When you choose to purge a client from your system, all records relating to that client will be removed. Before the actual purge takes place you will be offered the chance to print out records of the client to keep on file.

6.4 Manage

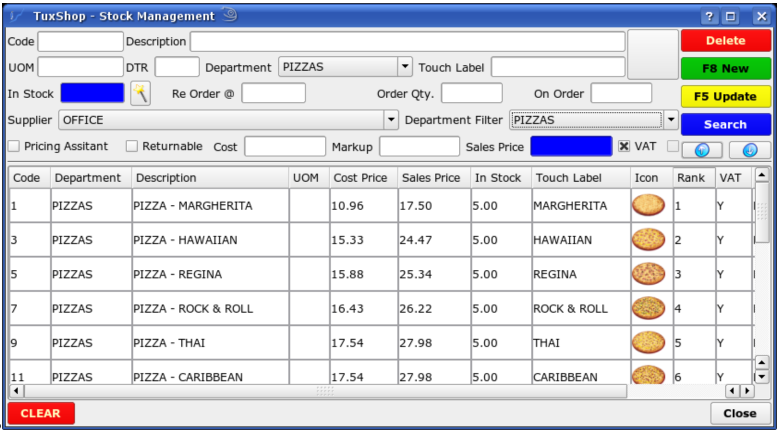
6.4.1 Departments

Figure 6.1: Departments

You may add as many departments as are required, however it may be prudent to think about operation of the touch interface and the number of levels that may be required to navigate. The order of the Departments on the touch panel can be adjusted using the Up and Down rank buttons. The touch display is populated from left to right and top to bottom.

6.4.2 Inventory

Figure 6.2: Inventory



SS

When inserting new entries the code must be unique, product bar codes can be used with TuxShop, or you may choose a simple ascending number. If left blank TuxShop will try choose the next sequential number automatically. The unit of measure is used in the invoice and the audit history.

The Cost, Markup, Sell exc. and Sell inc. fields all work together, in addition if Tax's are enabled the Tax check buttons affect the Sell inc. Fields. When the tax, cost or markup of an item is changed the two sell fields will automatically update to reflect the new sales price. In practice it often occurs that the final selling price becomes something like R146.01 this causes change problems for typical cash items such as bags of dog food. In this case you might elect to adjust the selling price by hand to R146.00 bear in mind that coupled with your tax rate it may not be possible to get a rounded number. For example with a TAX rate of 14% and a selling price or R148.24

the total inclusive would be R168.99, changing the selling price to R148.25 would result in a selling price of R169.01

You adjust the price by modifying the Sell exc. Field, as you modify this field, the Sell inc. price will update. You will also notice that the Sell exc. field changes colour to red, this is to warn you that the price has been modified, and is not the same as the automatically calculated price.

It is also possible to adjust the final selling price including VAT. When adjusting this field the ENTER key must be pressed to force an update of the Sell exe. field.

When deleting, updating, or creating new entries dialogues will confirm your requested action, and warn you when data will be changed. Errors are also reported via dialogues, get into the habit of reading the messages in these dialogues as they are there to prevent unwanted actions from destroying your data.

The supplier field its possible entries from the list of suppliers that is managed in the Supplier panel. The use of this field is critical if you wish to use the automatic stock control and ordering facilities of TuxShop.

To disable stock control on any items adjust to *Order Qty.* to 0, this will inform the system that no stock control on this item is required.

For services such as annual licenses that should be re-purchased it is possible to set the *DTR* (Days to Renewal) field to contain the number of days till the repurchase is required. For example an annual license would be set to 365. Using the File, Mail, Renewal menu option the system will automatically produce a Renewal Reminder within 20 days of the renewal expiry date. These reminders are used to preempt your clients to purchase a renewal of the item or service.

The order of the Inventory items on the touch panel can be adjusted using the Up and Down rank buttons. The touch display is populated from left to right and top to bottom.

By using the Department filter you can choose to display only inventory items that exist in the selected department. This is useful when you have a large number of stock items.

6.4.3 Orders

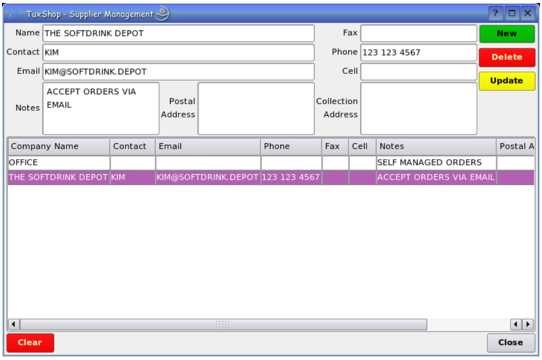
Activating this option will check all Merchandise stock levels and generate order forms for suppliers who's product ranges are below the re-order level. The system will not re-order items already on back-order.

When the document is presented for printing the behavior is identical to that of Invoices and Receipts in that the Close option will cancel the request, all other options will result in the system assuming the transaction is completed.

6.4.4 Suppliers

The supplier page provides simple record management of the suppliers of Merchandise to your business. The Company field is used in Merchandise management to ensure that automatic order forms can be created.

Figure 6.3: Suppliers



All the fields are self explanatory, but beware unlike other fields there is no automatic formatting so care should be used to enter data in a manner that will produce acceptable printouts. For example we suggest using "Hills" vs. "hills”

6.5 Clear All Ctrl+L

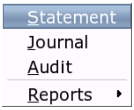
The Clear all facility clears the interface and places the system in a state read to start new transactions. All references to previously access accounts are cleared. This is mostly used after invoicing to an account that has a credit option and will pay later, when the Receipt page is raised, **Ctrl+L** will ready the system for the next customer.

6.5.1 Preferences

This will activate the Preferences dialogue, see section **??**

7 The View menu

Whenever a letter is shown as **Underlined** a simple key press will select that menu option.



7.1 Statement

Activating this facility will display a statement for the currently selected client. This will be done even if that clients balance is 0 or in debit. This is an extremely fast and simple technique to confirm inquiries from clients as to their account status.

7.2 Journal

Activating this facility will display a journal trail of Invoices and Receipts for the currently selected client. The trail can be printed or emailed if required.

7.3 Audit

Activating the Audit trail will present a document containing a complete and detailed trail of all transactions made with the currently selected client. In addition your private notes will also be displayed in this trail. The audit trail is your tool for sorting out possible conflicts with clients over purchases and payments.

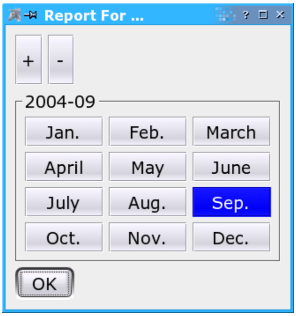
Your private notes could be useful in reminding you of promises you or your staff might have made that now only your client remembers.

7.4 Reports

The reporting functions of TuxShop assist you in your management of your company. If you require additional reports and functionality you should lodge a feature request with us at info@tuxsoft.co.za

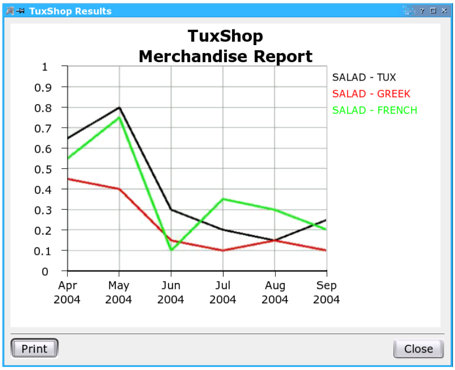
Reports fall into to main categories, historical reports and current reports. Historical reports provide you with comparisons over a six month period. When presented with the date selection for historical reports the date selected is month 6 of the six month period. For current reports it is the month for that report.

Figure 7.1: Date selection



In addition historical reports can have items selected to chart for a visual comparison of these results.

Figure 7.2: Charting Reports



To Chart Items simple select and highlight the entries required then click the **Chart** Button.

7.4.1 Merchandise Performance

The merchandise report will generate a historical comparison of merchandise sold over a six month period until the date selected. The merchandise report supports charting of your results. Clicking on the column titles will sort the list of items according to that column. A second click reverses the sort order.

Figure 7.3: Merchandise Performance

Description	2004-04	2004-05	2004-06	2004-07	2004-08	2004-09
APPLETISER						6
SALAD - GREEK						4
SUBS - THAI **LARGE**						2
PIZZA - HAWAIIAN						2
PIZZA - DELUX CHEESE BURGER *						2
GARLIC PITA						2
DESERT - MEGA ICE CREAM						2
COKE						2
CHOCOLATE DOUBLE THICK SHAK						2
VANILLA SHAKE						
VANILLA DOUBLE THICK SHAKE						
TOMATO COCKTAIL						
TEA						
SUBS - VEGETARIAN **LARGE**						
SUBS - VEGETARIAN						
SUBS - TUX DELUX **LARGE**						
SUBS - TUX DELUX						
SUBS - THAI						
SUBS - CLUB **LARGE**						
SUBS - CLUB						

7.4.2 Services Performance

These services report will generate a historical comparison of services rendered over a six month period until the date selected. The services report supports charting of your results. Clicking on the column titles will sort the list of items according to that column. A second click reverses the sort order.

7.4.3 New Clients

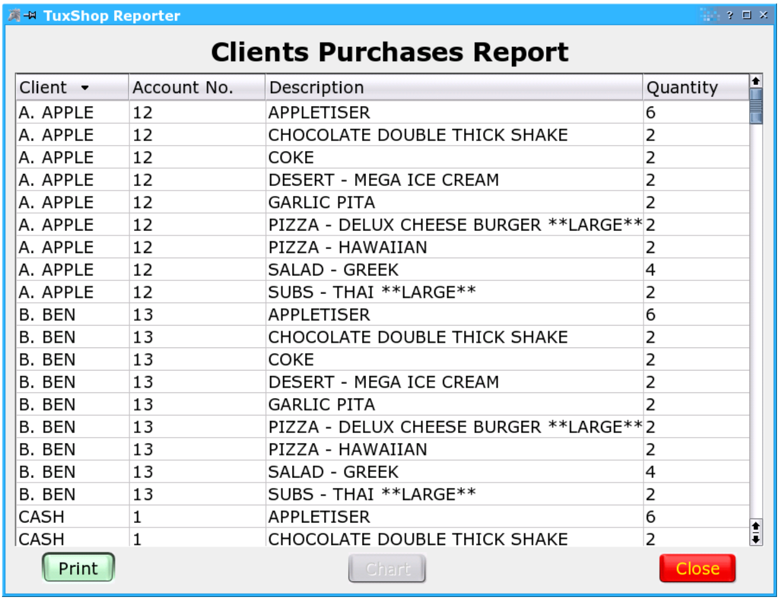
The new clients report will generate a historical comparison of the number of new client your business has registered over a six month period until the date selected. The new clients report supports charting of your results. Clicking on the column titles will sort the list of items according to that column. A second click reverses the sort order.

7.4.4 Client Purchases

The client purchases report is a current report that gives the items purchased per client for the selected month. This may be useful in deciding which clients should be sent information on a promotion you may be having.

hat gives the items purchased per client for the selected month. This may be useful in deciding which clients should be sent information on a promotion you may be having.

Figure 7.4: Client Purchases


TuxShop Reporter

Clients Purchases Report

Client	Account No.	Description	Quantity
A. APPLE	12	APPLETISER	6
A. APPLE	12	CHOCOLATE DOUBLE THICK SHAKE	2
A. APPLE	12	COKE	2
A. APPLE	12	DESERT - MEGA ICE CREAM	2
A. APPLE	12	GARLIC PITA	2
A. APPLE	12	PIZZA - DELUX CHEESE BURGER **LARGE**	2
A. APPLE	12	PIZZA - HAWAIIAN	2
A. APPLE	12	SALAD - GREEK	4
A. APPLE	12	SUBS - THAI **LARGE**	2
B. BEN	13	APPLETISER	6
B. BEN	13	CHOCOLATE DOUBLE THICK SHAKE	2
B. BEN	13	COKE	2
B. BEN	13	DESERT - MEGA ICE CREAM	2
B. BEN	13	GARLIC PITA	2
B. BEN	13	PIZZA - DELUX CHEESE BURGER **LARGE**	2
B. BEN	13	PIZZA - HAWAIIAN	2
B. BEN	13	SALAD - GREEK	4
B. BEN	13	SUBS - THAI **LARGE**	2
CASH	1	APPLETISER	6
CASH	1	CHOCOLATE DOUBLE THICK SHAKE	2

Print Chart Close

Use the column heading to sort by Client, Description or Quantity.

7.4.5 Client Expenditure

The client expenditure report is that gives the total expenditure per client for the selected month. This may be useful in determining discount offering for clients based on expenditure rather than frequency of visits.

Figure 7.5: Client Expenditure

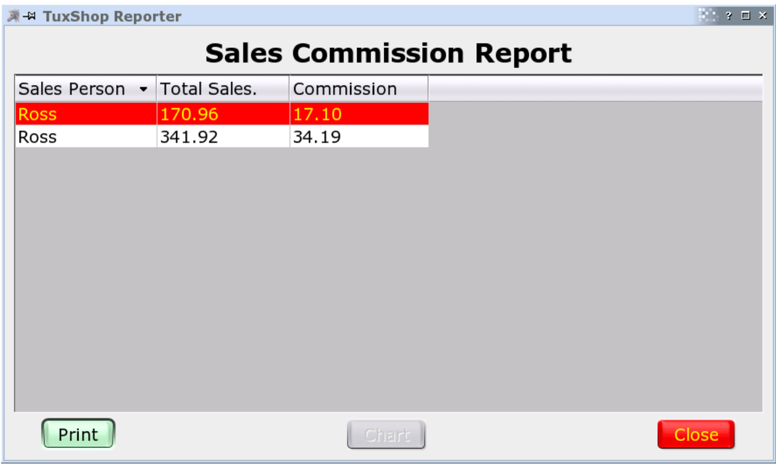
7.4.6 Client Debt

A report that is useful for the terrible task of collection of moneys outstanding. All clients with outstanding debt are shown. Those who are overdue are shown in red. In addition the contact details for the clients are shown.

With business's that have a common client base this list can be used as a shared list of clients who have bad debt.

7.4.7 Commissions

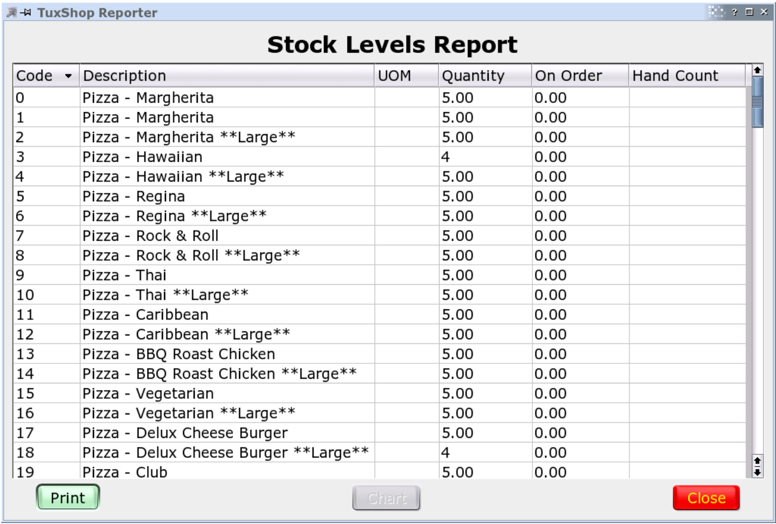
Figure 7.6: Commissions



The commissions report presents a table of commission due to your sales personnel. Entries shown in Red are on sales made but not yet paid for.

7.4.8 Stock Levels

Figure 7.7: Stock Levels



TuxShop Reporter

Stock Levels Report

Code	Description	UOM	Quantity	On Order	Hand Count
0	Pizza - Margherita		5.00	0.00	
1	Pizza - Margherita		5.00	0.00	
2	Pizza - Margherita **Large**		5.00	0.00	
3	Pizza - Hawaiian		4	0.00	
4	Pizza - Hawaiian **Large**		5.00	0.00	
5	Pizza - Regina		5.00	0.00	
6	Pizza - Regina **Large**		5.00	0.00	
7	Pizza - Rock & Roll		5.00	0.00	
8	Pizza - Rock & Roll **Large**		5.00	0.00	
9	Pizza - Thai		5.00	0.00	
10	Pizza - Thai **Large**		5.00	0.00	
11	Pizza - Caribbean		5.00	0.00	
12	Pizza - Caribbean **Large**		5.00	0.00	
13	Pizza - BBQ Roast Chicken		5.00	0.00	
14	Pizza - BBQ Roast Chicken **Large**		5.00	0.00	
15	Pizza - Vegetarian		5.00	0.00	
16	Pizza - Vegetarian **Large**		5.00	0.00	
17	Pizza - Delux Cheese Burger		5.00	0.00	
18	Pizza - Delux Cheese Burger **Large**		4	0.00	
19	Pizza - Club		5.00	0.00	

Print   Chart   Close

The stock levels report presents a list of stock, the quantity on hand, the quantity on order, and an empty slot to fill in hand count for reconciliation.

7.4.9 Received Stock Audit

This report is unique in that it presents documents for printing or viewing. Whats more it may present multiple documents in succession. In fact one document for each delivery that took place during the selected month.

Figure 7.8: Received Stock Audit

Notes for the delivery are shown in mauve, subsequent suppliers are grouped and highlighted fore easy identification.

7.4.10 Actions

The actions report is a log of all activity that has taken place excluding normal sales and invoicing operations, discounts and price changes are logged. The actions log is intended to help you keep tabs on your staff and locate any abnormal behavior. It can clearly indicate when staff are having problems with various aspects of your business or the use of TuxShop. After viewing the log you may optionally clear it.

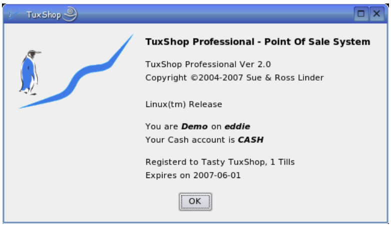
8 The Help menu

8.1 Contents ...

This presents an online version of this users guide.

8.2 About

Figure 8.1: Help About



The help about dialogue presents information on the logged in user, their default cash account, and your license or lease status.

9 System Customisation

In this chapter we describe how you can customise various aspects of TuxShop to suit your environment.

9.1 Creating a new language

You can select the language that each user will have the TuxShop GUI operate in from the Personnel page in the Preference dialogue.

Before a language can be chosen its message catalogue must be created. This process is not complex, but is rather time consuming. To create a new message catalogue or update an existing catalogue follow these steps.

1. Change directory to /opt/tuxsoft/i18n/TuxShop (Windows use C:\Program Files\TuxSoft\i18n)
2. Check if a message catalogue for your locale exists, if so proceed to step 4
3. Copy each of the template file to the required name matching your locale. For example ..
   `cp i18n.ts af_ZA.ts`
4. Run the application ‘linguist’ and **open** the newly created ’ts’ or existing catalogue file.
5. Add translations for all needed texts, **Save** and then **Release** your translations.

6. Change directory to /opt/tuxsoft/share/TuxShop
7. Copy the English directory to one with the name of your newly created language. For example..
   cp -a English af_ZA
   or...
   xcopy /E English af_ZA
8. Edit each of the document parts in your new folder translating all strings as required.
9. Start TuxShop and select the new language in the SysInfo page of the Preferences dialog.

9.2 Customising your Documents

TuxShop uses a versatile system for document printing. All documents are created from basic HTML templates. Note do not use Java or Java Script they are unsupported. These template are divided into three sections. **WARNING DO NOT USE WYSIWYG HTML TOOLS, USE ONLY A PLAIN TEXT EDITOR, USING MICROSOFT TOOLS OR EXTENSIONS WILL BREAK YOUR SYSTEM.**

1. The Head - this contains the title, the client and your address information, and the basic header for items to be added to the document.
2. The Items - this contains a repeatable section that is used to add items to the document.
3. The tail - this closes the document off and adds any footers required.

Data is replaced into the documents by searching them for $keywords embedded in standard HTML comments. For example <!–$date–> might be replaced with 2004-09-04

The existing documents are contained in ***/opt/tuxsoft/share/TuxShop/English*** you can examine these an gain a clear idea of the principles used. You can also commission us at Tuxsoft to customise your documents to suite your requirements. If you have created a new language or are using one of the onse supplied, replace ***English*** with the language created, Eg. ***af_ZA***

In addition some templates are stored in TAX1 and the TAX2 folders, these are choosen depending on the tax selections made in Preferences. The structure uses a fallback system falling back from TAX2 to TAX1 and finally back to the template root, Eg. English.

The following Documents are available, all have the format of Doc**Head**.html Doc**Item**.html and Doc**Tail**.html we do not recommend editing the Audit, Journal, Stock, Cashup or Monthend classes.

9.2.1 Invoice

The Invoice has the following keywords, remember to embed with <!–$**keyword**–>

Table 9.1: Invoice Head Keywords

Keyword	Description
logo	Image source for fancy logo
number	Document number
date	localised date
datetime	localised date and time
shortdate	yyyy-mm-dd
time	hh:mm:ss
acc	Clients account number
client	Clients name
postal	Clients postal address
shipping	Clients shipping address
phone	Clients phone number
cell	Clients cell phone number.
email	Clients email address
aline1	Address line 1 as in SysInfo
aline2	Address line 2 as in SysInfo
aline3	Address line 3 as in SysInfo
aline4	Address line 4 as in SysInfo
aline5	Address line 5 as in SysInfo
aline6	Address line 6 as in SysInfo
aline7	Address line 7 as in SysInfo
sequence	sequence number of the day (Order number)

Figure 9.1: Invoice Item Keywords

Keyword	**Description**
quantity	The number of items
iquantity	Integer number of items.
uom	Unit of Measure
department	The department of the item
description	The description of the item
date	localised date
datetime	localised date and time
shortdate	yyyy-mm-dd
time	hh:mm:ss
price	the price of the items(s)
unitprice	The unit price of the item.
category	The category of the item
discount	The discount given
tax1	Y or N to indicate taxable
tax2	Y or N to indicate taxable
taxflags	* = Tax1, # = Tax2, exempt

Table 9.2: Invoice Tail Keywords

Keyword	Description
tax1	Value in % of tax1
tax1name	Name of tax Eg. VAT
tax1total	Value of tax1
tax2	Value in % of tax2
tax2name	Name of tax Eg. GST
tax2total	Value of tax2
subtotal	Total excluding taxes in Exclusive mode
total	Total including taxes
exctotal	Total of tax exempt items
exc1total	Total of tax1 exempt items
exc2total	Total of tax2 exempt items
invfoot1	Invoice Footer as in SysInfo
invfoot2	Invoice Footer as in SysInfo
cashier	Name of the personal logged in.
date	localised Date of transaction
datetime	Localised date and time of the transaction
shortdate	yyyy-mm-dd
time	hh:mm:ss
sequence	Order number
number	Invoice number
acc	Account Number
client	Client name

9.2.2 Quote

The Quote has the following keywords, remember to embed with <!–$**keyword**–>

Table 9.3: Quote Head Keywords

Keyword	Description
logo	Image source for fancy logo
number	Document number
date	localised date
datetime	localised date and time
shortdate	yyyy-mm-dd
acc	Clients account number
client	Clients name
postal	Clients postal address
shipping	Clients shipping address
phone	Clients phone number
cell	Clients cell phone number.
email	Clients email address
aline1	Address line 1 as in SysInfo
aline2	Address line 2 as in SysInfo
aline3	Address line 3 as in SysInfo
aline4	Address line 4 as in SysInfo
aline5	Address line 5 as in SysInfo
aline6	Address line 6 as in SysInfo
aline7	Address line 7 as in SysInfo

Figure 9.2: Quote Item Keywords

Keyword	**Description**
quantity	The number of items
iquantity	Integer number of items.
description	The description of the item
price	the price of the items(s)
unitprice	The unit price of the item.
category	The category of the item
discount	The discount given
tax1	Y or N to indicate taxable
tax2	Y or N to indicate taxable
taxflags	* = Tax1, # = Tax2, exempt

Table 9.4: Quote Tail Keywords

Keyword	**Description**
tax1	Value in % of tax1
tax1name	Name of tax Eg. VAT
tax1total	Value of tax1
tax2	Value in % of tax2
tax2name	Name of tax Eg. GST
tax2total	Value of tax2
subtotal	Total excluding taxes in Exclusive mode
total	Total including taxes
exctotal	Total of tax exempt items
exc1total	Total of tax1 exempt items
exc2total	Total of tax2 exempt items
invfoot1	Invoice Footer as in SysInfo
invfoot2	Invoice Footer as in SysInfo
cashier	Name of the personal logged in.
date	Date of transaction

9.2.3 Receipt

The Receipt has the following keywords, remember to embed with <!–$**keyword**–>

Table 9.5: Receipt Head Keywords

Keyword	Description
logo	Image source for fancy logo
number	Document number
date	yyyy-mm-dd
acc	Clients account number
client	Clients name
postal	Clients postal address
shipping	Clients shipping address
phone	Clients phone number
cell	Clients cell phone number.
email	Clients email address
aline1	Address line 1 as in SysInfo
aline2	Address line 2 as in SysInfo
aline3	Address line 3 as in SysInfo
aline4	Address line 4 as in SysInfo
aline5	Address line 5 as in SysInfo
aline6	Address line 6 as in SysInfo
aline7	Address line 7 as in SysInfo

Figure 9.3: Receipt Item Keywords

Keyword	Description
description	The description of the item
payment	The amount paid

Table 9.6: Receipt Tail Keywords

Keyword	**Description**
tender	Total amount tendered
change	Change due
outstanding	Outstanding amount on account
recfoot	Receipt footer as in SysInfo

9.2.4 Statement

The Statement has the following keywords, remember to embed with <!–$**keyword**–>

Table 9.7: Statement Head Keywords

Keyword	Description
logo	Image source for fancy logo
number	Document number
date	yyyy-mm-dd
acc	Clients account number
client	Clients name
postal	Clients postal address
shipping	Clients shipping address
phone	Clients phone number
cell	Clients cell phone number.
email	Clients email address
aline1	Address line 1 as in SysInfo
aline2	Address line 2 as in SysInfo
aline3	Address line 3 as in SysInfo
aline4	Address line 4 as in SysInfo
aline5	Address line 5 as in SysInfo
aline6	Address line 6 as in SysInfo
aline7	Address line 7 as in SysInfo

Figure 9.4: Statement Item Keywords

Keyword	Description
date	yyyy-mm-dd
description	The description of the item
amount	The value of the transaction

Table 9.8: Statement Tail Keywords

Keyword	Description
total	Total for the statement
current	Current balance
day120	120+ Day balance
day90	90 Day balance
day60	60 Day balance
day30	30 Day balance
statefoot1	Statement footer as in SysInfo
statefoot2	Statement footer as in SysInfo
statefoot3	Statement footer as in SysInfo
handed	Message if account handed for collection, blank if not.

9.2.5 Slip and ASCII printers

There are a few very basic features that may be used when creating forms for your slip or ASCII printer. In the preferences editor you can define codes for BOLD on, BOLD off, Emphasised on and Emphasised off text modes, the template files have the extension **.slip** and **.slip40**

Here are some examples for an HP laser or deskjet.

Table 9.9: HP slip codes

BOLD ON	27,40,115,49,66
BOLD OFF	27,40,115,48,66
EMPHASIZED ON	27,40,115,49,83
EMPHASIZED OFF	27,40,115,48,83

An example of an Epson FX series printer

Table 9.10: Epson FX slip codes

BOLD ON	27,71
BOLD OFF	27,72
EMPHASIZED ON	27,69
EMPHASIZED OFF	27,70

An example for Epson ESC/POS slip printers

Table 9.11: Epson ESC/POS slip codes

BOLD ON	27,71,33
BOLD OFF	27,72,32
EMPHASIZED ON	27,69,33
EMPHASIZED OFF	27,70,32

Text justification

It is also possible to justify parameters to some extent in the slip templates, to left justify to a given with use the following format. **[-38]<!--$owner-->** to right justify use the following format **[38]<!--$aline1-->**

So for example you template might include the line..

[-38]<!--$owner-->[38]<!--$aline1-->

This would place the owners name on the left of the page and the name of your practice on the right.

Embedding Codes

You can also embed printer specific codes into your documents using the **&code&** facility. A common use would be in the tails of documents where one would like the printer to form feed the page. In this case we would simply use the code **`&12&`** at the end of out template.

You could also use this technique to set your page length, cut the paper, or even print the document type in a larger font. The embedded codes however have no effect on the preview dialogue.

Comments

Slip templates now support comments using the standard # as a comment indicator. The # must be the first character in a line for that line to be treated as a comment.

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