WELCOME TO THE HowToPay POS MANUAL!

Operated by Confidia Limited

A standout feature of Confidia Limited's HowToPay POS system is its cloud-based software. Developed specifically to address the unique challenges restaurants face using conventional off-the-shelf solutions, this Software as a Service (SAAS) platform offers easy setup and user-friendly operation. Restaurant owners can quickly establish accounts through a web browser, enabling immediate system use.

HowToPay POS specialises in delivering comprehensive payment and billing solutions, including our innovative POS systems. We ensure our financial services are secure and compliant by leveraging a globally licensed and regulated fintech partner network. With a solid commitment to excellence, HowToPay POS continuously evolves its offerings to meet businesses' dynamic needs, facilitating efficient and reliable payment processes.

We hope this manual helps you get the most out of your HowToPay POS system!

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SYSTEM REQUIREMENT

To ensure optimal performance of the HowToPay

Please adhere to the following system requirements:

Hardware Requirements

- **Operating System**:
  - Windows
  - Android
  - iOS
  - macOS
- **Processor**:
  - RK3566 Quad-core Cortex-A55, up to 1.8GHz
- **Memory**:
  - Minimum: 2GB RAM
  - Recommended: 4GB RAM
- **Storage**:
  - Minimum: 40MB free hard drive space

Additional Recommendations

- For best performance, ensure your device is connected to a stable internet connection.
- Regular software updates are recommended to maintain security and efficiency.

By meeting these requirements, your HowToPay will function smoothly, enhancing your restaurant's operational efficiency.

INSTALLATION

Installing the HowToPay is quick and straightforward, no matter the device you're using

For Android:

1) Open the Google Play Store.
2) Search for HowToPay
3) Tap to Install. The app downloads and installs automatically
4) Once done, tap **Open** to start using it

For IOS:

1) Open the Apple store.
2) Search for HowTowPay
3) Tap to install. The app downloads and install
4) Once done, tap **Open** to start using it

For Window:

1) Visit www.mypos.howtopay.com
2) Select Main POS App and download

	Android	iOS	Windows
Main POS App	Download	Download	Download
Waiter App	Download	Download	X
Report App	Download	Download	X

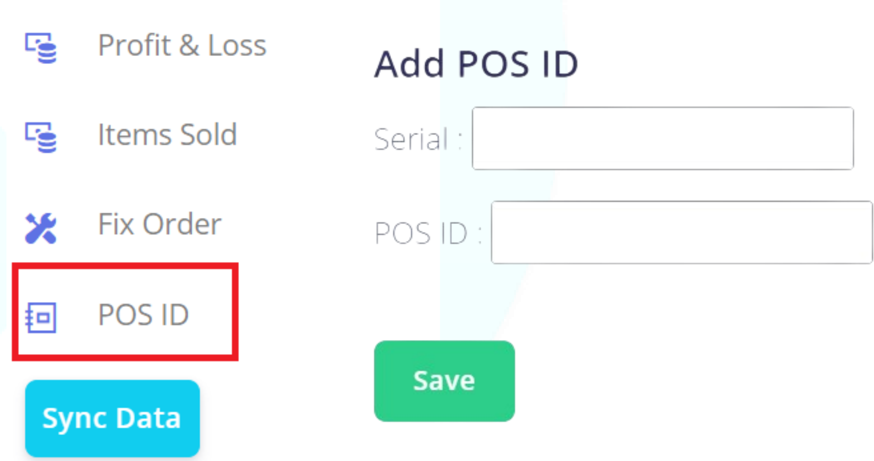
3) Extract all /howtopay-window.zip and install
4) Once done, tap htp_pos_mobile.exe to start using it

SET UP POS ID

After submitting the document, the Revenue Department will review it (**the instructions are defined in Appendix 1**). Upon approval, they will issue a unique POS system code, which you need to install on the POS system before it can be legally used.

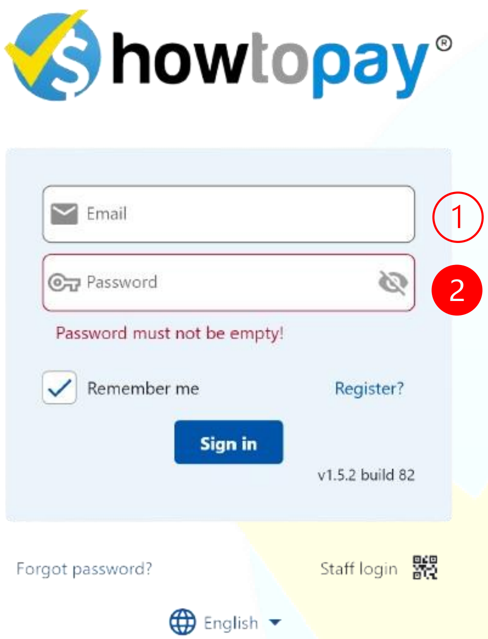
Install the POS system code.

After receiving the code from the Revenue Department, install it on the POS system in the specified location to ensure compliance when issuing tax invoices.



OWNER-MANAGER SECTION

LOGIN PAGE



The login page allows users to securely access the POS system based on their assigned roles (Owner, Manager, Waitstaff, Kitchen Staff). To Log in :

1) **Registered Email**: Enter the registered email address in the system during setup. Each user must use their email for secure access: www.mypos.howtopay.com
2) **Password**: Input the unique password assigned to your account. Keep the password confidential to prevent unauthorised access.
3) **Role-Based Access**: The system will automatically load the dashboard based on your role upon login.
    - **Owner**: Full access to the system
    - **Manager**: access to settings, reports, inventory, and user management.
    - **Waitstaff**: Access to table management, order taking, and payment processing.
    - **Kitchen staff**: View incoming orders and update order status.

After successfully entering your credentials, click the Sign In button to proceed. If you encounter any issue with your login, contact the system administrator for assistance. Support@howtopay.com

If you forget your password, follow these steps to reset it:

1) **Click on Forget Password**: select the “Forgot Password” link below the password field on the login page.
2) **Email Verification**: Enter your registered email address. The system will send a verification email to this address.
3) **Check Your Email**: Open the email and follow the instructions provided to verify your account and reset your password.
4) **Reset Password**: You will be prompted to create a new password after verification. Ensure it is strong and secure.

Once reset, you can use the new password to log in. If you don’t receive the email, check your spam/junk folder or contact the system administrator for further help: Support@howtopay.com.

EMPLOYEE MANAGEMENT

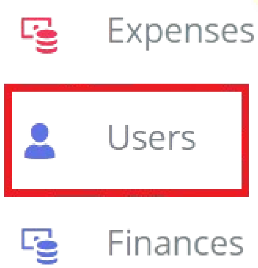
As the owner or manager, you can manage employee accounts and set up access permissions within the POS system. Follow these steps to create and manage staff accounts:

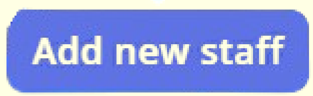
Creating a New Employee Account

Log into the POS system with your **Owner** or **Manager** credentials.

USERS Option: Navigate to the **Staff Management**

Click on the Add New Staff button to create a new employee account.





Setting Up Login Access

Please enter the new staff member's required details, including their name, email address, and password.

Assign a role for the employee based on their responsibilities:

- Owner: Full access to all functions, settings, and reports.
- Manager: Access to manage staff, view reports, and perform high-level operational tasks.
- Waitstaff: Access to table management, taking orders, and payments.
- Kitchen: Access to the Kitchen Display System (KDS) for viewing and managing orders.

Assigning Roles and Permissions

- Choose the appropriate permissions for the staff based on their role in the restaurant. This defines which functions of the POS system they can access.
- Each role comes with predefined access levels, but you can customise permissions if necessary to better fit your operational needs,

Saving Employee Information

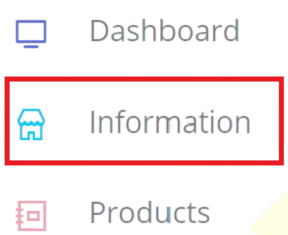
1) Once all details are entered and the role is assigned, click Save to create the account.
2) The new staff member can now log in with their credentials and perform assigned to their role.

NAME	EMAIL	ROLE	ACTIONS
Sakda	@howtopay.com	Cashier	Edit Delete
Mike	@howtopay.com	KDS	Edit Delete
Jack	@howtopay.com	Manager	Edit Delete
Mo	@howtoppay.com	Cashier	Edit Delete

RESTAURANT MANAGEMENT

In the OIS system, restaurant owners and managers can easily manage and update all essential business information by following these steps:

Accessing Restaurant Information



1) Log in to the POS system and navigate to the Information section from the main menu.
2) This is where you can set up and update all essential details related to your restaurant.

Setting Up Restaurant and Company information.

1) Enter your **Restaurant Name** and **Company name**.
2) Add a detailed Restaurant Description that provides an overview of your business.
3) Fill in the **Restaurant** and **Company addresses** to ensure accurate location information.
4) Input the **Restaurant Tax ID** for legal and accounting purposes.
5) Provide the **Phone Number** and **Website** to make it easier for customers to contact and find you online.

QR Menu and Logos

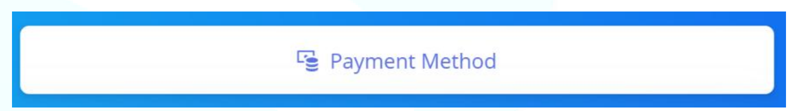
Upload your restaurant's Logo to personalise the POS interface and customer receipts.

If applicable, add the QR menu so customers can easily access your digital menu from their smartphones.

VAT and Services Charges

Set up the applicable **VAT (Value Added Tax)** and any **Service Charge** percentages that will automatically be applied to customers' bills.

Payment Methods

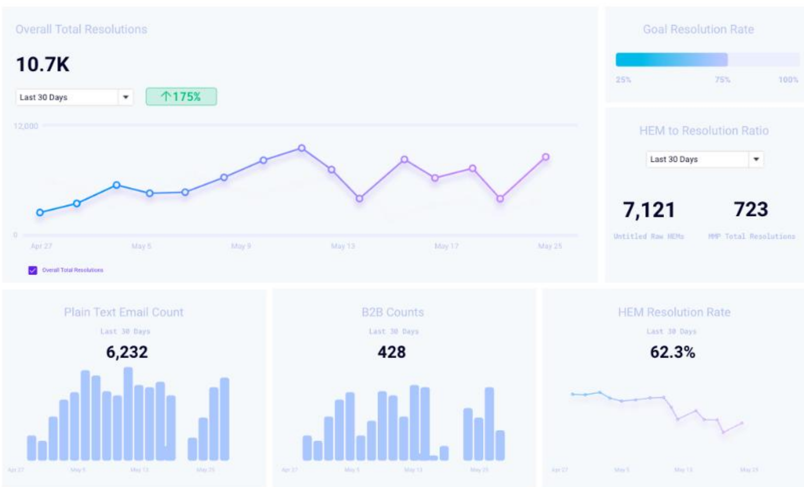


Configure your accepted Payment Methods, such as:

- Cash
- Credit Card
- QR Payment

By Completing these steps, you ensure your restaurant's essential details are well-organised and easily accessible, which helps streamline operations and customer interactions.

DASHBOARD



The HowToPay POS Dashboard provides an intuitive overview of your restaurant's performance, allowing you to track key metrics and make informed decisions quickly. Here's what you can expect:

Daily, Monthly, and Yearly Income: The dashboard includes an interactive graph that displays your income. You can select the view data for:

Daily: A detailed breakdown of income for the current day.

Monthly: An overview of income for the entire month.

Yearly: View your total yearly income for long-term performance tracking.

Specific Date: Customise the date range to view income for your chosen period.

Top 10 Best-selling Menu items: The dashboard highlights the Top 10 menu items sold within the selected period. This lets you quickly identify your most popular dishes and adjust your menu or promotions accordingly.

Payment Options Breakdown: The dashboard also provides a summary of the different payment methods used by your customers, such as:

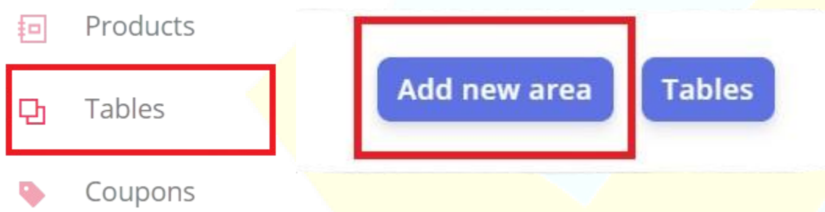
- Cash
- Credit/Debit Card
- Mobile payment (QR code)

This overview helps you monitor sales trends, understand customer preferences, and make adjustments to improve your restaurant's performance effortlessly.

TABLE MANAGEMENT

The table management feature allows you to create a customised restaurant layout, making it easier for staff to manage seating and track orders. Follow these steps to set up and design your table layout:

Table Options: Navigate to the Area Management section in the POS system.



In Area Management, you can create different zones for your restaurant (e.g. indoor, outdoor, VIP section).

To create a new area:

- Click Add New Area
- Name the area (e.g., Patio, Dining Room, Floor 1) and select the plan to number the tables.

You can also edit or delete areas as needed.

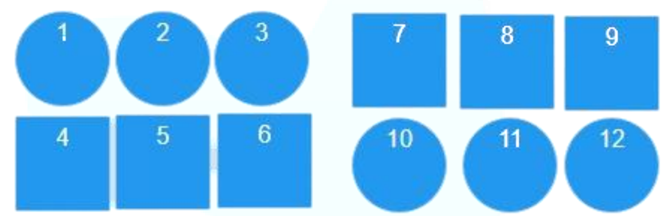
Design Table Layout

After setting up your areas, you can begin designing the layout:

Select the floor plan or the area you want to design.

1) Drag and drop table icons to arrange them as they are in your actual restaurant.

2) Label each table with a unique number or name to help staff identify tables when taking orders.



Save and Review

1) Once you've designed your layout, click Save to apply the changes.
2) Review the layout to ensure it matches the physical arrangement of your tables.

With this setup, you can streamline your restaurant's operations, making table assignment and order tracking efficient and accurate.

PRODUCT MANAGEMENT

Product Option: Navigate to Product Management in the POS system.

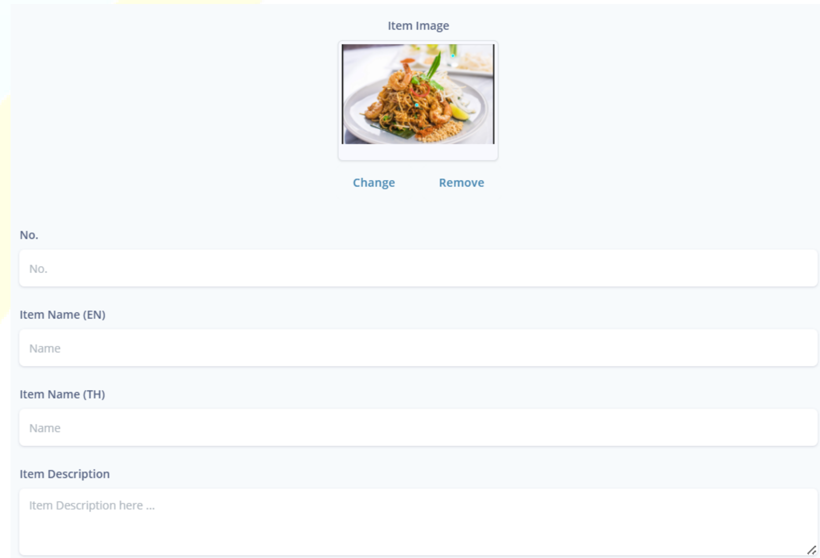
- Select add Category to organise your items (e.g. Dishes, Beverages)
- Enter the Category Name and Click Save to create the category.

Add a New Product

Click the Plus signal button to add a new item to your menu in the desired category.

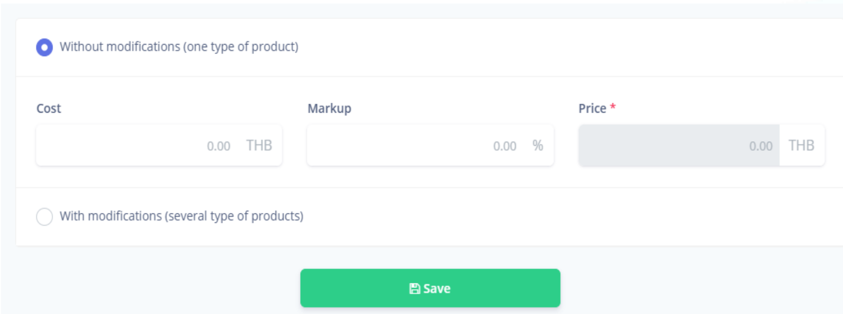
PRODUCT DETAILS

The product management feature makes managing your menu items, including dishes and beverages, easy. Here's how to add categories and products and customise them with detailed information.



- **Product Image**: Upload an image of the dish or beverage for easy identification.
- **Product Number**: assign a unique number for tracking and inventory purposes. (If applicable)
- **Product Name**: Enter the name of the item in both Thai and English
- **Item Description**: provide a brief description of the product, including ingredients or unique feature

SET PRICING DETAILS



Cost: Enter the cost to prepare the item.

Markup: Define the percentage or amount of markup to determine the profit margin.

Price: The system will automatically calculate the selling price based on the markup, or you can manually set the final price.

PRODUCT MODIFICATION

You can create and add modifications for each product to offer customers options

For example:

Dish Modifications: add spice level options (mild, medium, spicy)

Beverage Modification: Add options for ice level (no ice, less ice, packed ice) or milk type (Whole milk, almond milk)

Add-ons: Include extra times like toppings (cheese, bacon) or sides (fries, salad).

For each modification, specify if there's an additional cost (e.g. " Add cheese + 10 THB")

Once all details have been entered and reviewed, click Save. The product will now be available for customers to order under the appropriate category in your menu.

This product management process ensures that your menu is organised, prices are accurate, and customers can customise their orders, enhancing their overall dining experience.

IMPORTANT NOTICE

Every time changes are made in the POS system, it is essential to finalise the process by clicking "Sync Data" and waiting for "Success" This ensures that all updates are fully synchronised across all your devices and the POS system.

This additional step will enhance system performance and speed by ensuring data consistency across platforms.

CREATING A MENU

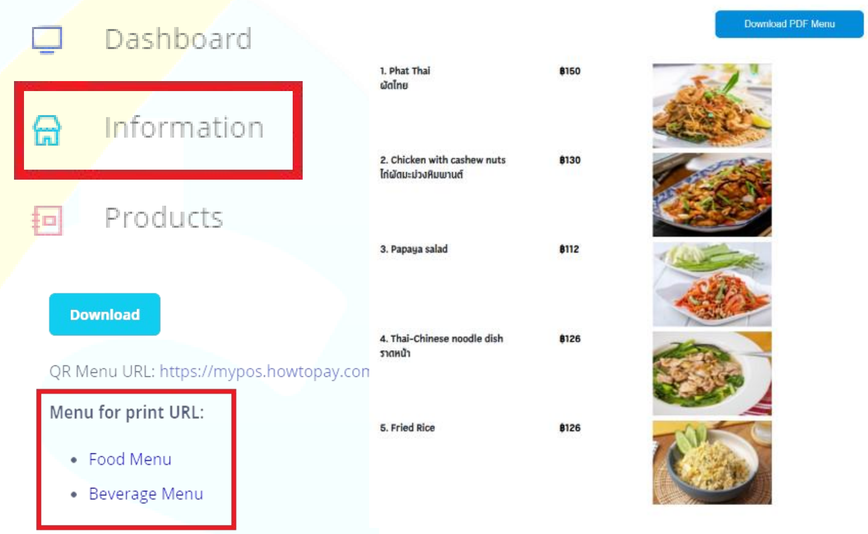
To help streamline your menu setup, HowToPay Offer **24/7 support** for all your menu input needs. Our expert team is available around the clock to assist you with adding all your menu items and categories into the system.

You can provide us with a **snapshot of your menu**, including **pictures of your dishes**, and we will handle the entire process for you. Just contact us via email at support@howtopay.com, and we'll ensure your menu is quickly and accurately uploaded to your POS system.

This service ensures that your menu is ready to use without any hassle, allowing you to focus on running your restaurant. The complete menu can also **be downloaded in PDF format** and **printed out** for your records or in-house use.

Downloading and Printing the Menu

To download and print your menu, follow these simple steps:



1) Navigate to the **Information** section from the main menu.
2) Select **Menu for Print** from the available options
3) Choose the specific category you wish to print, such as Food Menu or Beverage Menu.
4) Once selected, you can download the menu in PDF format and print it out as needed.

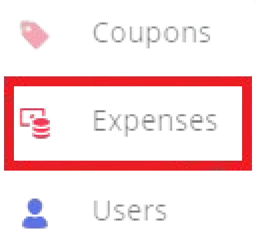
This feature allows you to have a hard copy of your menu for internal use of for providing to customers, ensuring your menu is easily accessible in both digital and printed formats.

EXPENSES MANAGEMENT

The Expenses Management feature allows owners and managers to track and record restaurant expenses efficiently. To manage the costs in the POS system, follow these steps.

Accessing Expenses Management

1) Log into the POS system with your credentials.
2) From the main menu, click on **Expenses**, which will direct you to the **Expenses Management** section.

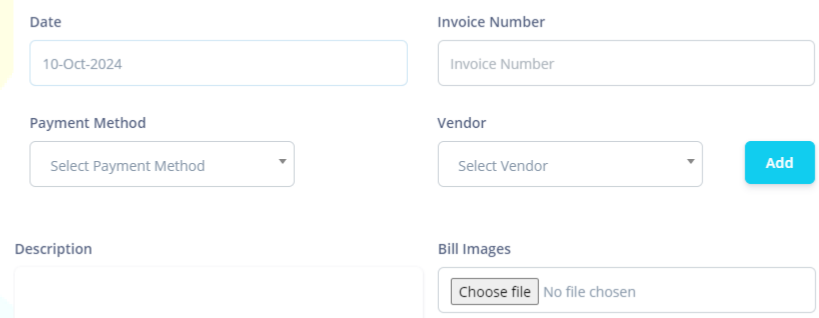


Adding a New Expense

To add a new expense, click on the Add New Expense button.

Enter the Expense Details

- **Date**: Select the date when the expense occurred.
- **Invoice Number**: Enter the invoice number associated with the expense for record-keeping.
- **Amount**: input the total amount of the expense.
- **VAT**: Enter the VAT (Value Added Tax) amount or percentage if applicable.
- **Payment Method**: Choose how the expense was paid (e.g. cash, credit card, bank transfer).



Vendor Selection

Choose the **Vendor** from the list of existing vendors.

You can add a new vendor name and contact details if the vendor is not listed.

Category Selection

Select the appropriate Category from the predefined list (e.g., ”Food Supplies”, “Maintenance”, “Utilities”).

If necessary, add a new category to classify the expense correctly.

Description

Provide a detailed Description of the expense for additional context (e.g., “Purchased cleaning supplies for the kitchen”)

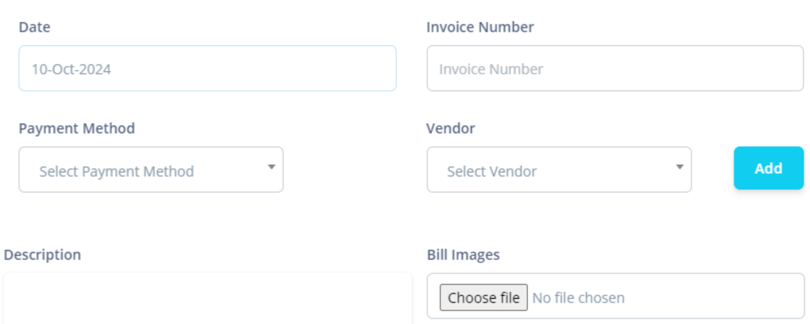
Upload Bill Image

Attach a digital copy of the Bill or Receipt by uploading an image. This helps keep all records in one place and simplifies future audits or reviews.

Saving the Expense

After filling in all the details, click Save to record the expense in the system.

The expenses will now appear in your list, with all information for easy tracking and reference.



Vendors

You can add a New Vendor by clicking on the Add Vendor option. Input the vendor’s name and relevant details (e.g., contact information) here.

You can also edit existing vendor information by selecting a vendor from the list and updating the necessary details.

NAME	CODE	ACTIONS
JAKE GAS LIMITED	0001	Edit Delete
Electric City	0002	Edit Delete
Rent	0003	Edit Delete

Categories

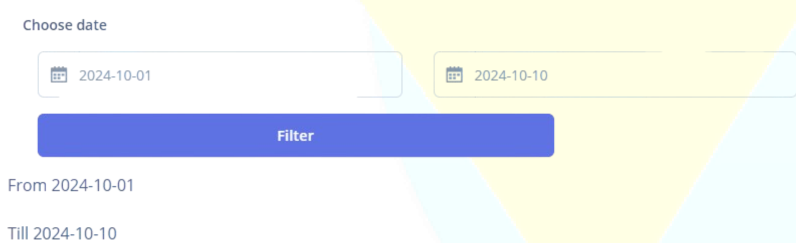
To organise your expenses, you can add new Expenses or a new Expense Category (e.g., “Utilities,” Food Supplies,” “Maintenance,” etc.) or edit existing categories to better categorise and track your expenses.

This process ensures that all expenses are captured, from the invoice number to the payment method, helping you maintain a well-organised financial record. Adding a screenshot of the expense input form, including where to upload bill images, could enhance user understanding.

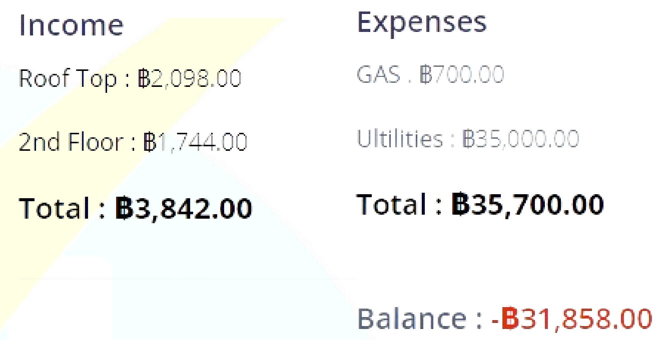
PROFIT & LOSS

You can easily track your restaurant's financial performance by clicking on Profit & Loss from the main menu.

1) **Select the period**: Choose the date range (daily, monthly, or yearly) for which you want to view the financial summary.



2) **View Income**: The system will show a detailed breakdown of all revenue generated, including sales from the different areas.
3) **View Expenses**: You can see a comprehensive list of expenses for the selected period, categorised by vendor, type, or other relevant categories.



4) **Check Balance**: The system will automatically calculate the balance, showing the difference between income and expenses and providing an overview of your profit or loss for the period

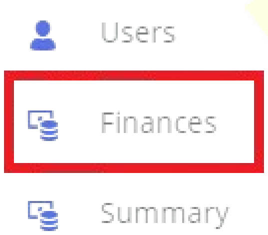
This feature gives you complete visibility into your restaurant's financial health.

FINANCE OVERVIEW

The Finances section of the POS system provides a detailed view of your restaurant's financial performance. Accessing this area allows you to monitor orders, revenue, and other key financial metrics. Follow these steps to navigate and understand the finances section:

Accessing the Finances Section

From the main menu, click on Finances to open the **Finances** to open the **Finances Overview.**



Viewing Financial information

In this section, you can view critical financial data, including

- **Total Order**: The total number of orders placed.
- **Total Revenue**: the overall income generated from all orders.
- **VAT**: The amount of Value Added Tax collected.
- **Net Revenue**: The income after deducting VAT and other taxes.
- **Delivery Charges**: The revenue generated from delivery orders (if applicable).

Filtering Data

Use the filter option to narrow down financial information by date range. Select specific dates, months, or years to analyse performance over a chosen period.

This lets you compare financial data for different timeframes, helping you track trends or specific events.

Order Details

The Finances section also includes a breakdown of all orders in detail, including:

- **Bill ID**: A unique identifier for each bill.
- **UID**: the user identification of the staff member who handled the order.
- **Date and Time**: The Timestamp creates and closes the bill.
- **Payment Options**: The method used for payment (e.g. cash, credit card, QR payment).
- **Table number**: The assigned to the order, if applicable.
- **Total Price**: the final amount for each order, including service charges and VAT.

This section gives you a complete financial overview, allowing you to monitor business performance, review sales data, and track exes and delivery revenue. I've included a screenshot of the finance dashboard and the filter option for clarity.

SUMMARY

The summary section provides management with a detailed overview of the restaurant's financial performance. By clicking on **Summary** from the main menu, you can access various vital metrics:

Filter Options

- **Select Date**: Choose a specific date or range to view the summary.
- **Select Branch**: You can select the branch for businesses with multiple locations to view its performance.

Order Type: Choose between viewing Normal order or filter for specific scenarios such as:

- **Void**: Order cancelled due to waitstaff mistakes.
- **On the Hoese**: Order offered free of charge.
- **Guest Left Orders**: Orders where guests left without playing.

Detailed Summary

The summary provides a detailed breakdown of **revenue**, including:

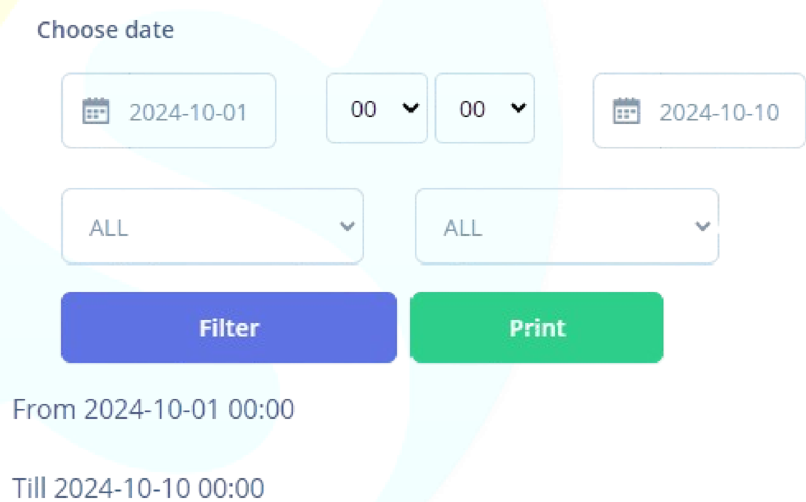
Payment Options: Overview of cash, credit card, or QR payments.

VAT: The amount of Value Added Tax collected

Service Charge: Additional service fees are added to the orders.

Tips: Total tips collected

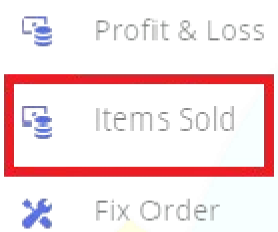
Number of Orders: Total number of orders processed during the selected period.



This section allows management to easily track and analyse the restaurant's financial performance in detail.

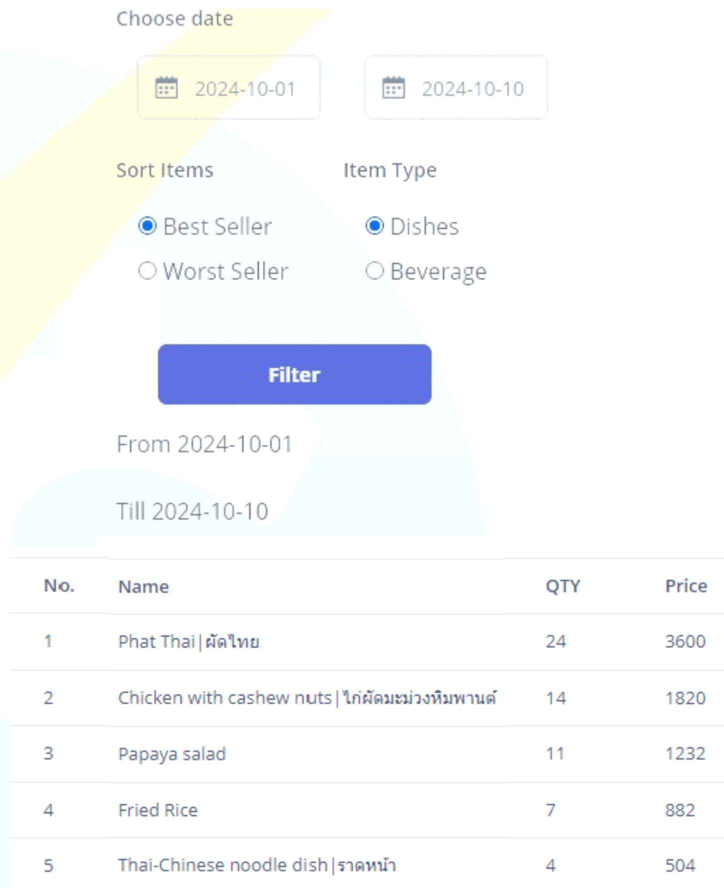
ITEM SOLD

By Clicking on Item Sold from the main menu, you track and analyse the performance of items sold in your restaurant.



1) **Select the Date**: Choose the specific date or range of dates you want to view the sales data.
2) **Sort Items**: you can organise the results by
   - **Best Seller**: view the most popular items.
   - **Worst Seller**: identify items that are selling the least
3) **Filter by Item Type**: choose between viewing only Dishes or Beverages to narrow your analysis.

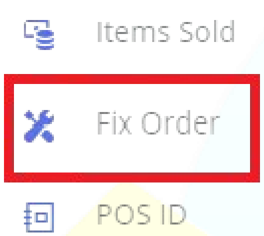
4) **View Detailed Results**: The system will display a detailed report of item sales, including item names, quantities sold, and total revenue for each item.



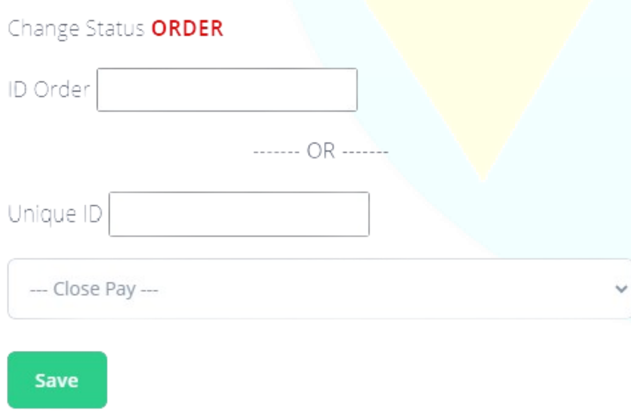
This feature helps you understand your top-performing items and those needing adjustment or promotion.

FIX ORDER

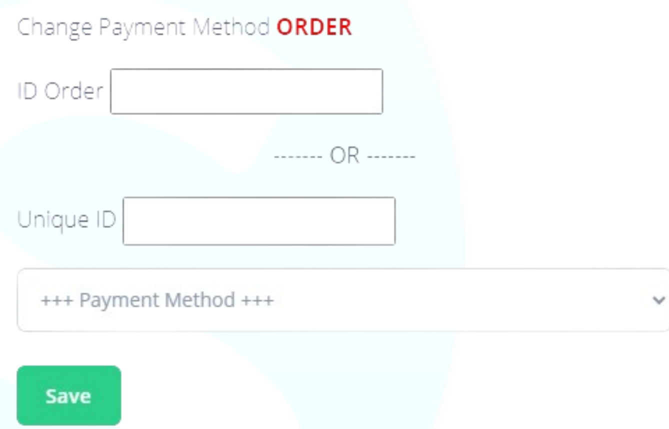
By Clicking on the **Main Menu**, Owners and managers can fix or adjust specific orders.



1) **Enter Bill ID or UID**: Search for the specific order by entering this Bill ID or UID
2) **Modify the Order**: Once the order is selected, you can make changes, such as correcting items or quantities within the order.



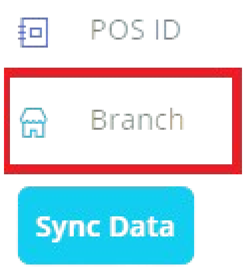
3) **Change Payment Method**: You can also change the payment method for the order (e.g., from cash to credit card) if needed.
4) **Save the changes**: After making the necessary adjustments, save the changes to update the order.

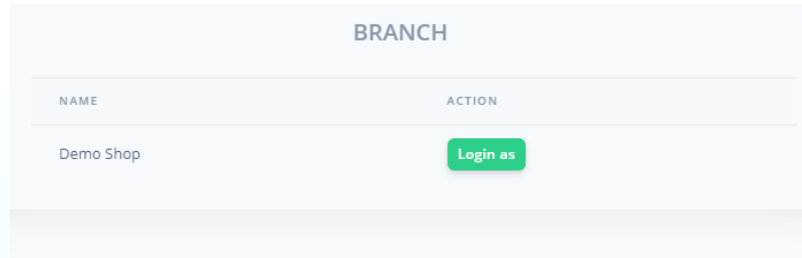


This feature ensures that errors in the order or payment can be corrected seamlessly, maintaining accurate records.

BRANCH

As an owner managing multiple branches, you can view each branch's financial performance, including profit and loss.





Click on Branch: from the main menu, select the branch and log in to the branch you want to analyse.

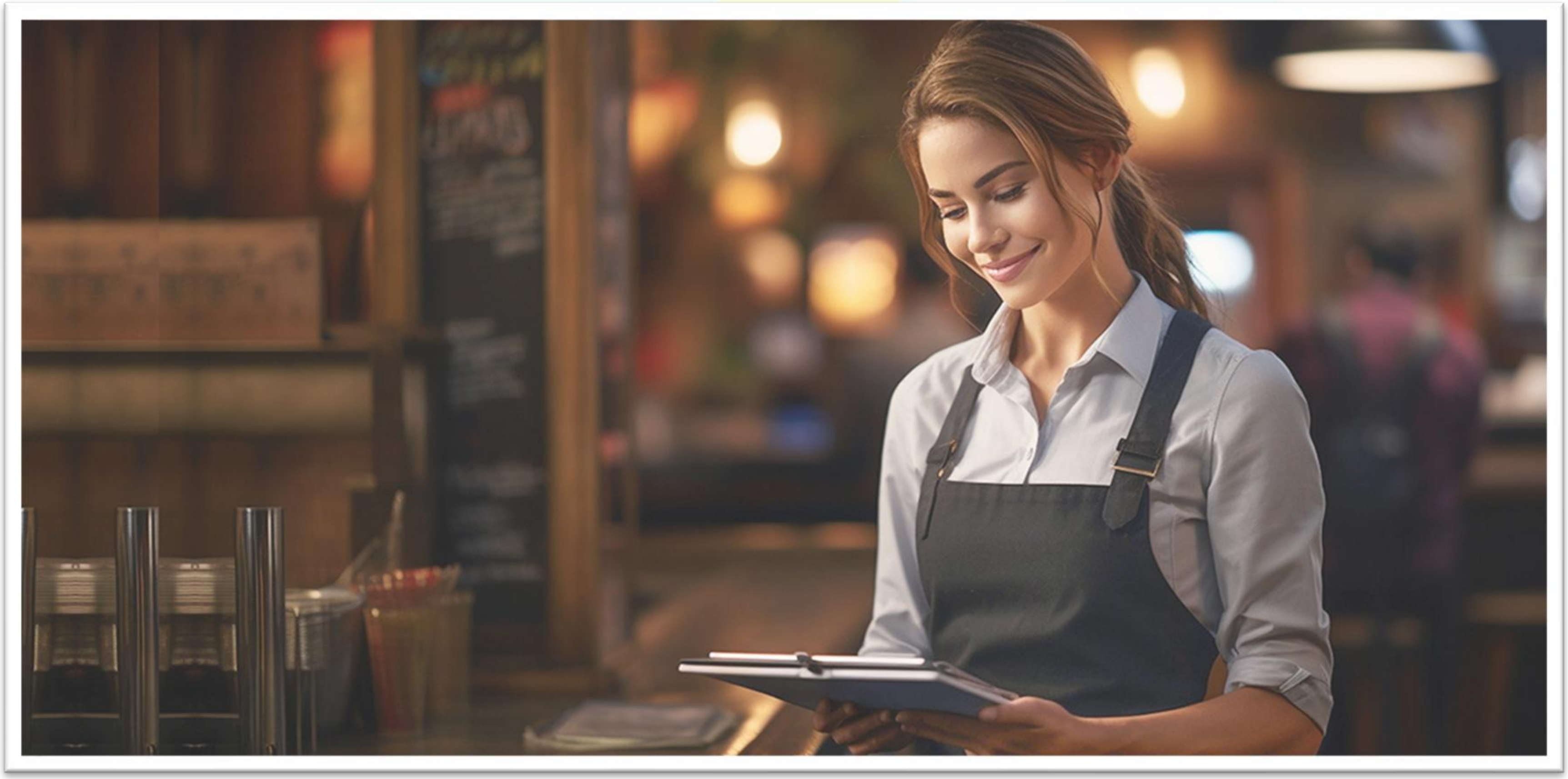
Access Dashboard: Once in the selected breach, navigate to the Dashboard

View Detailed Data:

- The **finance** section will show an overview of total revenue, payment methods, and taxes for the branch.
- The **Profit & Loss** section allows you to select a specific period to see income, expenses, and the balance for the branch.

This feature gives you a clear financial picture of each branch, allowing you to manage profitability across all locations effectively.

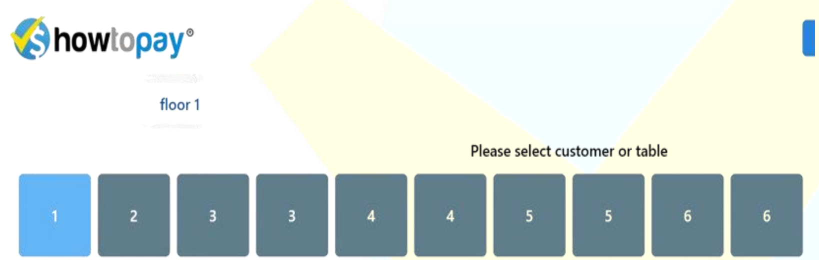
WAITSTER SECTION



TAKING AND MANAGING THE ORDERS

As a waitstaff, you will have seamless access to take and manage orders for the tables assigned to you. Follow these steps to handle customer orders efficiently:

Access the Designated Area



- Log into the POS system with your assigned role as a waitstaff.
- Navigate to the Floor plan or the Area, where you will see the restaurant's table layout designed in the system.
- Click on the specific Area (e.g., indoor, patio) where the customer is seated.
- Choose one of the available tables to start taking the order.

QUICK BILL OPTION

You can use the Quick Bill option if a customer places a quick order without needing a table.

Instead of selecting a table, go directly to the **Quick Bill** feature.

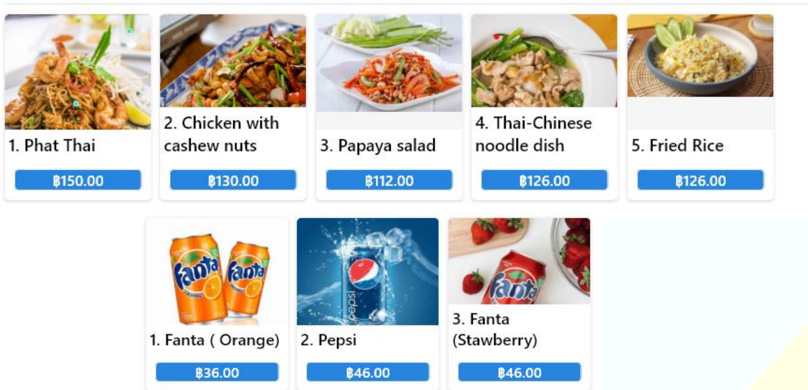
The system will skip table selection and take you straight to the Menu and Categories.

Please select the items, review them in the order list, and send the order to the kitchen like a regular table order.

Once the order is complete, you can generate a quick email for immediate payment.

This streamlined process allows you to quickly take and send orders to the kitchen from a designated table or through the quick bill feature, making service faster and more efficient.

VIEW THE MENU AND CATEGORIES



After selecting the table, the system automatically displays the restaurant's menu, organised by Category (e.g., Dishes, Beverages). Browse through the menu categories to find the desired items.

TAKING THE ORDER

To add an item to the order, **click on the image** of the customer's preferred menu item. The system will automatically add the item to the order list, displaying:

Name of the item (in both Thai and English, if applicable)

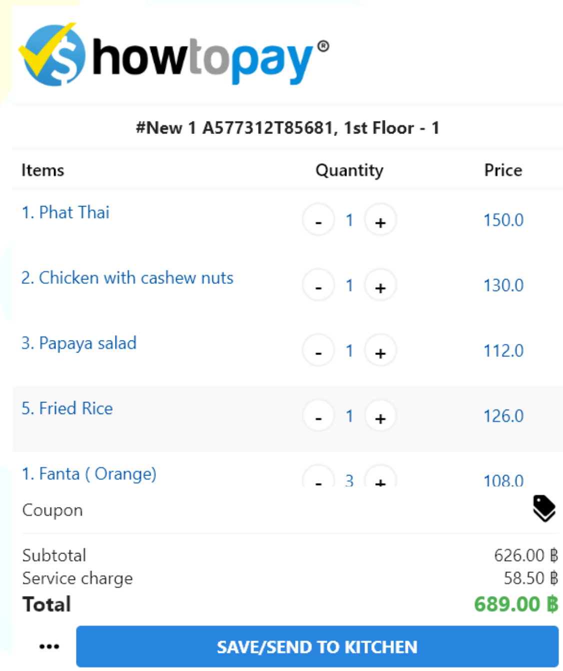
Quantity of times ordered.

Price of each item.

REVIEW AND CONFIRM THE ORDER

Once all items are selected, carefully review the order list to ensure that:

The items, quantities, and process are correct.



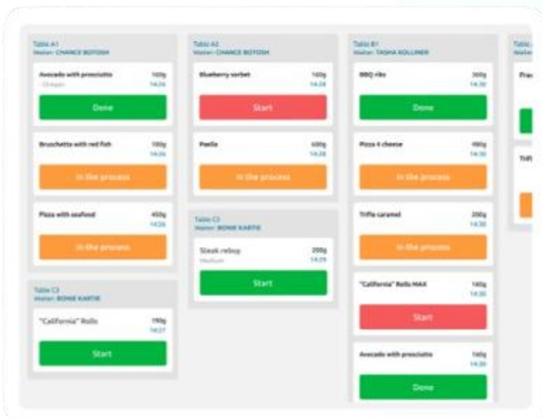
Any necessary modifications (e.g., spice level, add-ons) have been applied.

Adjust the order (e.g., change quantity or remove items) if needed.

SENDING THE ORDER TO KITCHEN

After confirming the order is correct, press Send Order to transmit the order to the kitchen immediately.

The kitchen will receive the order immediately on its display, allowing it to start preparing the food immediately.



This process ensures fast, accurate ordering, reduces errors, and enhances restaurant efficiency. Waitstaff can easily track the order status and provide better service to customers.

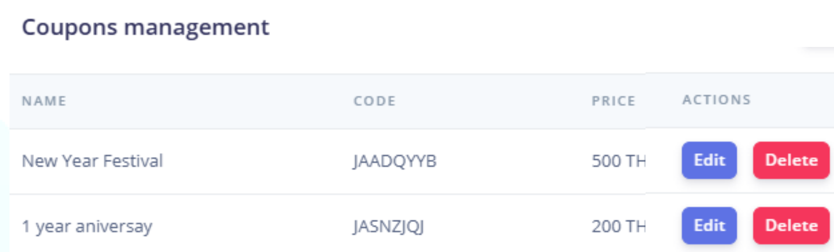
COUPON MANAGEMENT

Owners and Managers can easily create custom coupons for upcoming festivals or special events using the HowToPay POS system.

Follow these steps to create and manage unique coupons:

Accessing the Coupon Management

1) Log into the POS system with Owner or manager credentials.
2) click the Coupon Option from the main menu to open the **Coupon Management** section.


Coupons management

NAME	CODE	PRICE	ACTIONS
New Year Festival	JAADQYYB	500 TH	Edit Delete
1 year aniversay	JASNZJQJ	200 TH	Edit Delete

Creating a New Coupon

Enter the Coupon Name to reflect the festival or event (e.g. Holiday Special" or "New Year's Discount."

1) Setting Coupon Type and Discount
2) Fixed Discount: A set amount off the total bill (e.g. 100 THB off)
3) Input the discount value accordingly.

4) **Defining Active Dates**

- Set the Start date and End date for the coupon's availability. This defines the period when customers can use the coupon
- Ensure that the coupon is active only during the festival or promotion period.

Limiting Coupon Usage

Optionally, you can set a **Usage Limit** to control how many times customers can redeem the coupon.

Saving the Coupon

Once all the details are filled in, click Save to activate the coupon in the system.

This allows the restaurant to run promotional campaigns seamlessly and encourage customer participation during special occasions. A screenshot of the Coupon management interface could help visualise the process.

USING COUPONS

As a waitstaff, you can easily apply coupons to customer orders during the billing process. Follow these steps to use a coupon at check bill:

Select the Customer's Order

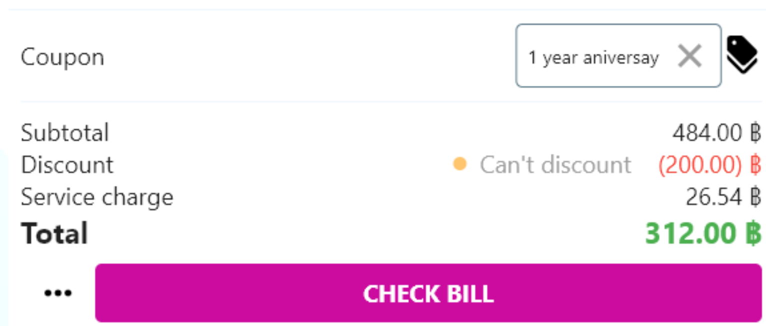
After taking the customer's order, click on the table or order from the active orders list to which you wish to apply the coupon.

Apply the Coupon

In the billing Screen, click on the **Coupon Option.**

A list of available coupons will be displayed. Select the appropriate coupon the customer provides (e.g., festival or promotional).

The system will automatically apply the discount based on the coupon type (fixed or percentage).



Verify the Discount

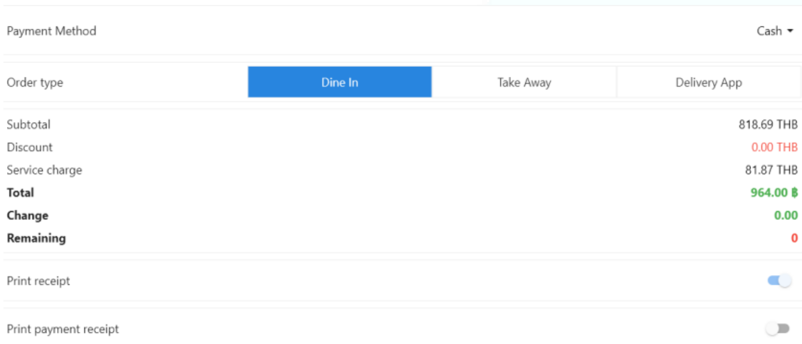
Review the subtotal, discount, service charge, and tax to ensure the coupon has been applied correctly.

If everything is correct, proceed to checkout.

CHECK BILL

Click on the order you want to check from the list of active orders.

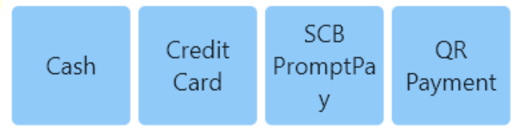
The system will display a summary of the order, showing:



- **Subtotal**: Total amount before any additional charges or discounts.
- **Discount**: Any applied discounts.
- **Service Charge**: Automatically added service fees(if applicable.)
- **Tax:** The calculated tax amount.
- **Total**: The final amount after applying charges and taxes.

Selecting payment Method

1) Choose the customer's preferred Payment method from the available options (e.g. **Cash, credit card, QR payment**).
2) Input the Amount paid by the customer
3) The system will automatically calculate any change that needs to be made to the customer based on their payment.
4) Once everything is confirmed, mark the order as "**Mark as Paid**" to complete the transaction.



Close Without Payment

The system also provides an option to Close Without Payment, which is helpful in situations such as:

Waitstaff error when placing an order.

The meal is offered "**On the House**" as a courtesy.

This action will close the order without recording any payment.

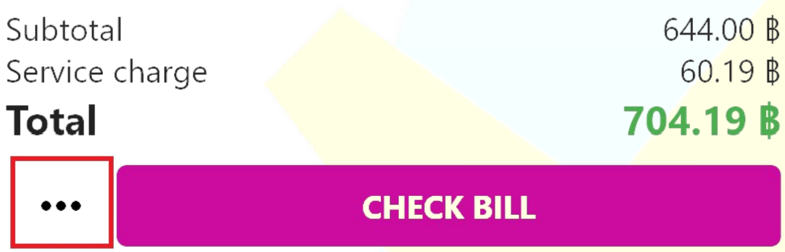
SPLIT / MOVE THE BILL

You can split or move the bill on the Check Bill page to accommodate your customers' needs better.

Here's how to do it

Access the Split/Mov Options

1) look for the icon beside the **Check Bill** button on the page.
2) Click the icon to reveal additional options.



Splitting the Bill

To split the bill, select the **Split Bill** option.

You can then divide the bill into separate parts by assigning numbers to each bill. For example:

- 1 for the 1st Bill
- 2 for the 2nd bill
- 3 for the 3rd bill

To	Items	Quantity	Price
1	1. Phat Thai	1	150.0
2	2. Chicken with c...	1	130.0
3	3. Papaya salad	1	112.0
2	4. Thai-Chinese n...	1	126.0
3	5. Fried Rice	1	126.0

This allows you to distribute items between multiple bills, perfect for customers who wish to pay separately.

Moving the Bill to Another Table

1) Select the **Move Bill** option to transfer the current bill to another table.
2) Choose the destination table from the available tables, and the system will automatically move the bill to that new table.

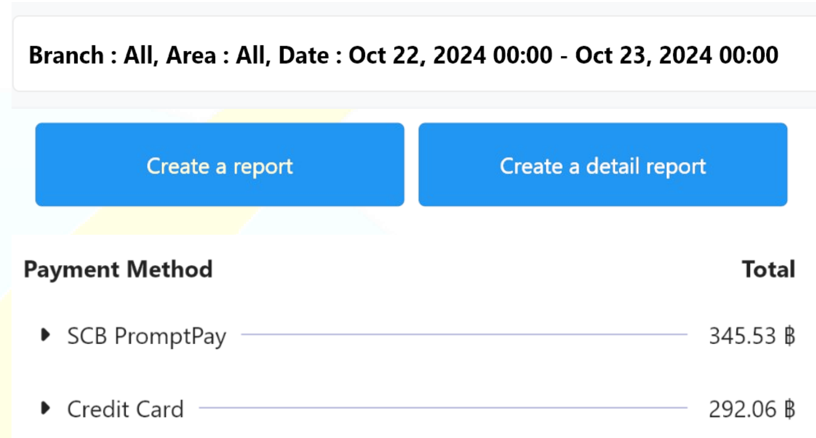
SETTLEMENT

At the end of your shift, the Settlement feature allows you to review and finalise your sales date effortlessly.

To begin, navigate to Options and select Summary. This will give you a comprehensive overview of your sales for that shift.

From the Top section, you can fine-tune the report by selecting:

- **Date**: Choose the specific day or range of dates for which you need the sales date.
- **Time**: Specify the time from within your shift to capture sales made during specific periods.
- **Branch**: If managing multiple locations, you can select the branch you want to review.
- **Area**: This option allows filtering sales by sections within the branch (e.g., dining, bar, outdoor)



Once these filters are applied, you'll see a detailed breakdown of your sales, including total sales and payment methods used. (e.g., cash, credit card, QR code Payment), service charges, and VAT. The system also generates insights such as the number of transactions, tips collected, and any discounts applied.

For a more detailed analysis, click on **Report in detail** to see individual transaction data.

You can then **create a report** summarising this information. If needed, the system offers a **print-out** option to provide a physical copy for your records or to submit to management. This streamlined process helps ensure an accurate end-of-shift settlement, simplifies reporting, and ensures transparency in financial records.

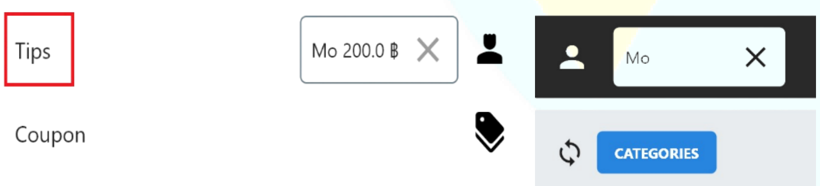
TIPS MANAGEMENT

During checkout, the cashier has the option to add a tip directly to the client's bill:

After the order is completed and the client is ready to check out, the cashier can see the **TIPS** section above the **Coupon** field in the payment summary.

To assign the **TIPS** to a specific server, the cashier clicks on the Top Section of the Tips field, displaying a list of the waitstaff. The cashier selects the appropriate waiter to ensure that the tip is credited to them.

The cashier can input a tip amount manually (based on the client's instructions).



Client Adding a Tip Manually

In some cases, the client may prefer to add a tip manually after reviewing the bill:

- Once the client is resented to the client, they can review the final total before deciding on a tip amount.
- The receipt will have a designated line at the bottom where the client can write the tip amount. This method allows the client to determine and personally add the tip at their discretion.
- The client then provides their signature on the receipt, confirming the added tip and completing the payment process.

Completing the Process

- After the tip has been added-whether by the cashier or the client- The total amount (including the tip) is updated on the final bill.
- The cashier will confirm the final total, process the payment, and ensure the tip is accurately reflected in the system.
- The system will then assign the tip to the waiter based on the cashier's selection or as indicated by the client, ensuring the appropriate waiter receives credit for the tip.

KITCHEN SECTION

KITCHEN DISPLAY (KDS)

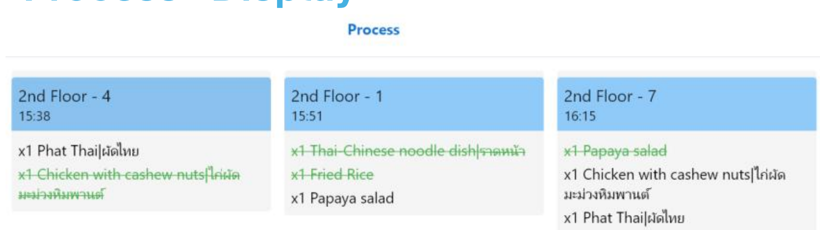
The Kitchen Display System (KDS) is designed to help kitchen staff efficiently manage orders sent by waitstaff, ensuring smooth operations and clear communication between the front and back of the house. Here's how it works:

Once the waitstaff sends an order, it will immediately appear on the KDS.

The display will show:

- Area: the section of the restaurant (e.g. indoor, patio) where the order was placed.
- Table number: The table assigned to the order.
- Menu Item: A list of dishes ordered, along with their quantities.

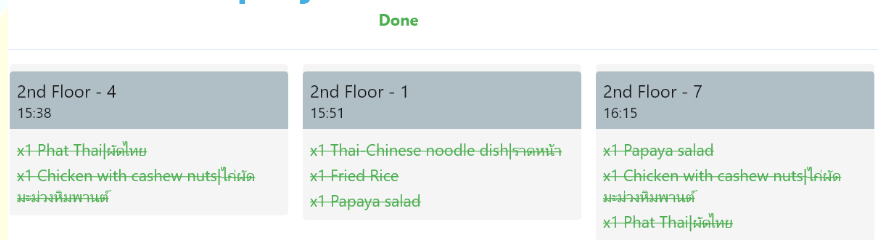
"Process" Display



All new orders will appear on Process Display, indicating they are pending preparation.

- As kitchen staff start working on an order, they can update the status of individual menu items.
- Click on the Menu item once it is completed to mark it as done.
- Alternatively, the kitchen staff can click on the top to mark all items as done simultaneously if the entire order is finished.

"Done" Display



Once the entire order has been completed, it will appear as a Done display on the KDS.

This allows kitchen staff to track which orders are ready to be served quickly.

Undo Completed Orders

If there is a need to revert a completed order to the **Process** Display (e.g. an order was marked by mistake), kitchen staff can do so by:

1) Clicking on the **Menu Items** under the "Done" Display.
2) This will move the order back to the Process display, allowing further actions.

TROUBLESHOOTING

This section provides solutions to common issues you might encounter while using the POS system. Follow the steps below to resolve any problems quickly.

System Not Responding

Issue: The POS system freezes or becomes unresponsive.

Solutions:

1) Check if your device has a stable internet connection.
2) Restart the POS application.
3) If the issue persists, reboot the device.
4) Contact your system administrator if the problem continues.

Unable to Log in

Issue: you are unable to log in using your credentials.

Solution:

1) Ensure you use the correct email and password for your assigned role.
2) Check your internet connection.
3) If you forget your password, click on **Forgot Password** and follow the instructions to reset it via email.
4) If you cannot log in, contact the system administrator to verify your account status.

Order Not Displayed in the kitchen.

Issue: Orders sent from waitstaff are not visible on the Kitchen Display System. (KDS).

Solution:

1) Ensure the order was submitted correctly by checking the waitstaff's order screen.
2) Verify that the KDS is connected to the network.
3) Refresh the KDS screen or restart the KDS device.
4) If the issue persists, contact technical support.

Incorrect Pricing on Orders

Issue: The wrong prices are appearing for items on the order.

Solution:

Confirm that the correct menu items were selected.

Verify that the pricing in the system is up-to-date in the **Product Management** section.

If necessary, update the item price and inform the system administrator of the discrepancy.

Printer Not Working

Issue: the receipt or kitchen printer is not printing orders.

Solutions:

1) Check if the printer is turned on and properly connected.
2) Ensure there is enough paper and the printer is clear.

3) Verify the printer settings in the POS system.
4) Restart the printer and try printing again.
5) If the issue remains, contact technical support.

Network or Connectivity issues

Issue: The POS system is slow or cannot connect to the network.

Solution:

1) Confirm your device is connected to a stable internet or Wi-Fi network.
2) Restart the device and reconnect to the network.
3) Contact your internet service provider or network administrator if the connection issue continues.

Order Not Sent to Kitchen or Bar

Issue: It does not appear in the kitchen or bar after placing an order.

Solution:

1) Doble -check that the order was confirmed and sent from the waitstaff's device
2) Ensure that the kitchen/bar display is active and online.
3) Try sending the order again.
4) If necessary, contact technical support for further assistance.

System Update

Updating the software regularly is essential to keep your POS system running smoothly. Follow these steps to update on your respective devices:

Android Devices.

1) Update via Play Store:
2) Open the Google Play store on your Android device.
3) Search for the HowToPay POS application.
4) If an update is available, you will see an "Update" button next to the app.

Apple Devices (IOS)

1) Update via Apple Store
2) Open the App Store on your iPhone or iPad.
3) Search for the HowToPay POS application.
4) If an update is available, tap the "Update" button to install the newest.

Windows Devices

Download the Latest Version:

1) Visit www.mypos.howtopay.com from your Windows device.
2) Navigate to the Download section.
3) Download the newest version of the POS system for Windows.
4) follow the installation instructions to update your POS system once downloaded.

System Updates and Errors

Issue: Error occurs during system updates, or the POS system requires an update.

Solution:

1) Ensure the device is connected to the internet.
2) Allow the update to complete. If interrupted, restart the update process.
3) If an error occurs, restart the system and check for available updates again.
4) Contact technical support if the system fails to update.

This troubleshooting guide is designed to help resolve common issues quickly and efficiently. For persistent problems or hardware malfunctions, please get in touch with support@howtopay.com.

https://mypos.howtopay.com/blog/5/Contact

COMING SOON

UPCOMING FEATURE FOR HowToPay POS

At HowToPay by Confidia Limited, we constantly evolve to bring you cutting-edge tools to simplify options, improve efficiency, and drive growth. Here’s a sneak peek at the exciting new features we’ll be introducing soon, designed to take your business to the next level:

Inventory Management System

Managing inventory is a critical aspect of running a successful restaurant. Our upcoming Inventory Management feature will provide restaurant owners with real-time tracking of stock levels, automated alerts for low inventory, and streamlined ordering processes. You’ll be able to:

- Monitor ingredient usage and tack waste.
- Set automatic reorder points to ensure you never run out of essential supplies.
- Generate detailed reports on stock levels and item consumption patterns.
- This feature will help optimise your stock, reduce food waste, and manage costs more effectively.

COMING SOON

TEAM APP & TEAM ATTENDANCE

Our **HowToPay Team Feature** will allow owners and managers to easily track and manage staff performance and attendance. This tool is designed to enhance team coordination and accountability, Providing:

- **Real-time attendance tracking**: Staff can clock in and out directly through the app and automatically log their hours for payroll.
- **Shift Scheduling & Notifications**:
  Managers can easily create and adjust shift schedules, and employees will receive notifications about their shifts, changes, and essential updates.
- **Tip& Commission Summary**: The app will also clearly break down each staff member's tips and commissions, ensuring transparency and team motivation.
- **Top 10 Best Performers**: Track your top-performing staff with real-time performance analytics. The app will rank the top 10 employees based on sales, customer satisfaction, or efficiency criteria, fostering a healthy competitive spirit within your team.

With the Team App, you'll have a complete overview of your staff's productivity, performance, and compensation, all while enhancing communication and team morale.

COMING SOON

THE PAPERLESS SYSTEM AND E-RECEIPTS

HowToPay is designed to streamline operations by fully digitising the transaction process. Rather than physical receipts, the system sends **e-receipts** directly to customers via **email or SMS**. This speeds up the payment process and gives customers a more convenient and accessible way to store and manage their receipts.

With e-receipts, customers can easily retrieve their purchase history without the hassle of keeping paper copies, and businesses can save on printing costs.

These digital records are also stored securely, ensuring easy access for the business and the customer and reducing the risk of lost or damaged receipts.

HowToPay is also dedicated to sustainability. By promoting a paperless workflow, we help reduce the environmental impact of paper production and waste. As part of our long-term commitment to environmental responsibility, we aim to support businesses in going green, significantly lowering their carbon footprint. This initiative aligns with our goal to contribute to global sustainability efforts, positively impacting the planet while offering innovative solutions to our clients.

COMING SOON

CONNECTIVITY TO FOOD DELIVERY PLATFORMS

Boost your restaurant's revenue by seamlessly integrating your POS System with major Food Delivery platforms. With this feature, you can:

- Sync orders directly from platforms into your HowToPay POS.
- Manage delivery and in-house orders from a single interface.
- Access real-time reports on delivery performance and revenue.

This connectivity will streamline your order management process, ensuring you never miss out on the growing food delivery market.

These upcoming features are designed to empower your restaurant, offering you the tools needed to operate efficiently and stay ahead in a competitive industry. Stay tuned for the launch of these exciting innovations, and continue to get the most out of your HowToPay POS system.

howtopay®

COMING SOON

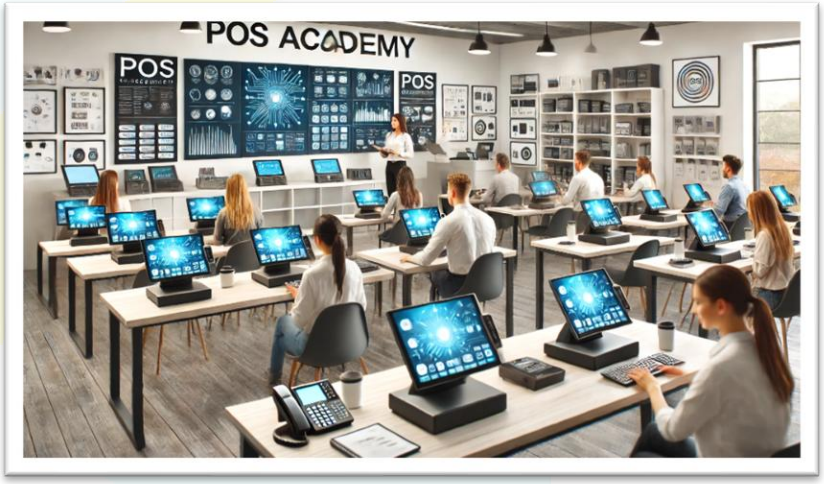
HowToPay ACADEMY & JOB ASSISTANCE

The **HowToPay Academy** is an innovative training platform designed to help restaurant staff master the HowToPay POS system. This comprehensive program offers in-depth learning modules and certifications for employees at all levels.

Key Features:

- **Training & Certification**: Restaurant staff can complete training courses and earn HowToPay Certificates, showing their proficiency in operating the POS System.
- **Job Assistance for Graduates**: Graduates of the HowToPay Academy will not only change their skills but also have access to job placement support. If a restaurant using HowToPay POS requires staff, we help match certified graduates with job opportunities, ensuring a seamless hiring process for both employers and employees
- **Improved Efficiency**: Certified staff members contribute to smoother operations and higher productivity, improving your restaurant's overall efficiency.

The HowToPay Academy provides the skills and support your staff needs to excel while helping businesses find well-trained, qualified employees.



COMING SOON

MEMBER SYSTEM & REWARDS PROGRAM

The HowToPay Member System is designed to enhance customer loyalty by offering a seamless rewards program. This feature allows restaurants to engage and reward customers for repeated visits and spending, encouraging continued patronage and boosting revenue.

Key Features:

- **Membership Enrollment**: Customers can quickly sign up for the loyalty program through a receipt, QR code, or online. Membership provides them with access to exclusive offers and rewards.
- **Points-Based Rewards**: Members earn points based on the total amount spent on every purchase. These points can be redeemed for discounts, free items, or special promotions during their next visit.
- **Tiered Membership Levels**: Restaurants can set tiered membership levels (e.g., Silver, gold, and platinum), where customers unlock more rewards and perks as they accumulate points and progress through levels.
- **Exclusive Promotions**: Members will receive special offers, such as birthday discounts, seasonal promotions, or early access to new menu items, directly via email or SMS.
- **Reward Redemption**: Customers can quickly redeem rewards by providing their membership details during checkout. The system will automatically calculate and apply the discount or offer.

This **Member System** drives customer loyalty and provides valuable data on customer preferences and spending habits, enabling restaurants to personalise offers and build stronger customer relationships.

HOWTOPAY POS VS. COMPETITOR

Feature	HOWTOPAY	Competitor A	Competitor B	Competitor C
Cloud-Based System	✓	✓	✓	✓
Free Setup & Local Support	✓	Limited	Limited	Limited
Customizable Table Management	✓	Limited	✓	✗
Comprehensive Reporting	✓	Basic	✓	Limited
Multi-Branch Management	✓	✓	✓	✗
Integration with Payment	✓	✓	✓	✓
Fintech Security & Compliance	✓	Limited	✓	✓
Multi POS Station installs FREE	✓	✗	✗	✗
Inventory Management	Coming Soon	✓	Basic	✗
Team App with Attendance & Tip	Coming Soon	Basic	✓ (no tip)	✗
Paperless System (e-receipts)	Coming Soon	✓	Limited	✗
Food delivery Integration	Coming Soon	Limited	✓	✗
Loyalty & Member Rewards	Coming Soon	Limited	✗	✗
POS Academy & Certifications	Coming Soon	✗	✗	✗

✓ Available ✗ Not Available

APPENDIX 1

For Thailand Users:

A POS (Point of Sale) system in your store isn't just about convenience; it's also essential for compliance with local legal requirements. If your business is registered or located in Thailand, it is necessary to register your POS system with the Revenue Department to issue tax invoices correctly. For VAT-registered businesses, this registration becomes particularly important to ensure smooth and compliant business operations.

For USA, Australia, Europe, and Other Users

Ensuring that your POS system follows the laws specific to your country is crucial. Aligning your POS system with local tax and regulatory requirements will help you maintain smooth and compliant business operations.

Why Register Your POS System with the Revenue Department?

If your store is VAT-registered, registering the POS system allows you to issue tax invoices legally. This is a crucial requirement for goods or services. Registration also lets you quickly issue customer receipts, streamlining your sales process.

Step to Register your POS system with the Revenue Department

Position the POS system Correctly

Once you have your POS system, select a location that aligns with your operations. The Revenue Department will require a layout of your store's equipment and network connections for review.

Prepare Required Documents

You'll need the following documents to register:

1) Form Por. Por. 06 (VAT registration form)
2) Details for the POS system specifications
3) A layout showing equipment connections
4) Sample tax invoice generated by the POS system.
5) Store layout and network diagram
6) Information about the POS system's security feature

Submit the Document to the Revenue Department

You can submit the documents to the Revenue Department office for your store. If your business has multiple branches, submit the documents to the department office where your headquarters is registered. Alternatively, you can submit the request online through the Revenue Department's website.

Complete the Form. The form includes all details, including the business owner's name, business address, VAT registration date (Por. Por.20), the type of goods and services, and the number of POS systems being used.

Wait for Approval

After submitting the document, the Revenue Department will review it. Upon approval, they will issue a unique POS system code, which you need to install on the POS system before it can be legally used.

Install the POS system code.

After receiving the code from the Revenue Department, install it on the POS system in the specified location to ensure compliance when issuing tax invoices.

Contact the Revenue Department to have an official sticker

The final step is to contact the Revenue Department to have an official sticker affixed to your POS system. After this, the POS system will be legally ready to use.

Important Considerations

Issuing tax invoices without registering the POS system could harm your business's reputation. To avoid issues, complete the registration process from the start to ensure compliance and pave the way for future business growth.

Prepare your POS system for use by registering it properly and start building a solid foundation for your business.

TERMS AND CONDITIONS

These Terms and Conditions (“Agreement”) govern the use of the POS system (“Service”) provided by HowToPay POS (“we”,” our”, or ”us”). By using the service, you(”User”) agree to the following terms:

Acceptance of Terms

You agree to be bound by this Agreement by accessing or using the Service. If you do not agree to these terms, you may not use the Service.

Use of the Service

- The Service is intended for business use by authorised users only.
- You are responsible for maintaining the confidentiality of your login credentials and for any activities under your account.
- The Service may not be used for unlawful purposes or to infringe on the rights of others.
- This machine is exclusively designed for use with the HowToPay POS system. By using this device, you agree to operate it solely with HowToPay POS software and services.
- Any attempt to use this machine with another POS system, software, or application is strictly prohibited. Unauthorised use with other systems may result in the termination of support services and void any applicable warranties.

User data

- The User retains all ownership rights to the data entered into the Service (e.g. orders, customer details, sales reports).
- We may collect specific data for performance analysis and service improvements but will not share it with third parties without your consent unless required by law.

Payment and Fees

- You agree to pay all applicable fees for using the Services as your subscription or service agreement outlines.
- Failure to pay may result in suspension or termination of access to the Services.

Limitation of Liability

- We are not responsible for any direct, indirect, incidental, or consequential damages arising from the use or inability to use the Service.
- The Service is provided on an “as is” basis, and we make no guarantees regarding its performance, uptime, or accuracy.
- Modifications to the Service
- We reserve the right to modify or discontinue the Service at any time, with or without notice.
- We will not be liable to you or any third party for any modification, suspension, or discontinuation of the Service.

Termination

- We reserve the right to terminate or suspend your access to the Service at any time, for any reason, including violation of this Agreement.
- You may terminate your use of the Service at any time by contacting us.

Intellectual Property

All intellectual property rights related to the Service, including software, logos, and trademarks, remain the property of HowToPay POS.

You may not copy, modify, distribute, or reverse-engineer any Service part without our permission.

Governing Law

This Agreement is governed by and construed by the laws of Thailand, without regard to its conflict of law principles.

Changes to the Terms

- We may update this Agreement from time to time. We will notify you by email or through the Service if changes are made.
- Your continued use of the Service after any changes indicates your acceptance of the updated Agreement.

Contact Us

For any questions or concerns about these terms, please get in touch with us at support@howtopay.com

By using the Service, you acknowledge that you have read and understood these Terms and Conditions and agree to be bound by them.

https://mypos.howtopay.com/blog/5/Contact

Privacy Policy

HowToPay POS (“we”,” our”, or ”us”) is committed to protecting your privacy. This Privacy Policy explains how we collect, use, and share information about you when you use our POS system (“Service”). By using the Service, you agree to this policy's collection and use of information.

Information We Collect

- **Personal Information**: When you create an account or interact with the Service, you may provide your name, email address, phone number, and other identifiable information.
- **Business information**: We collect details related to your restaurant, such as menu items, sales data, and employee information.
- **Payment Information**: Third-party payment processors will securely process and store payment-related details, including billing information.

How We Use Your Information

- **Service Operation**: We use your information to operate, maintain, and improve the POS system, including processing orders, managing staff, and generating reports.
- **Customer Support**: Your information helps us provide better support and troubleshoot issues.
- **Marketing**: We may send promotional information and updates about new features or services with your consent.

Sharing Your Information

- We do not sell or share your personal information with third parties except as necessary to provide the Service, comply with legal obligations, or protect the security of the Service.
- Third-party Services: We may share your information with third-party providers for payment processing, email services, and analytics.

Data Security

We take data security seriously and implement industry-standard measures to protect your information from unauthorised access, disclosure or loss.

Data Retention

- We retain your personal information only as long as necessary to fulfil the purpose outlined in this policy or as required by law.

Your Rights

- You can access, modify, or delete your personal information anytime by contacting us.

Changes to This Policy

- We may update this Privacy Policy from time to time. We will notify you by email or through the Service if significant changes are made.