Takkou Version 1

Getting Started

Installing the software

General informations

Make sure to read this manual once completely before using the software. It contains very important informations regarding the use of Takkou.

Please note that the screenshots shown in this document may differ from what you will see when using the programs.

Takkou consists of 3 programs that work together. The server, the database and the POS (point of sale). The server program allows the POS and the database to exchange informations. The database program manages the business informations like the products, customers, web site templates and more. And the POS allows you to manage your business and web site.

Each program stores data on your computer's hard disk. It is recommended to install the Takkou data in a single location with a sub-directory for each program. For example:

c:\Takkou\Server
c:\Takkou\Database
c:\Takkou\POS

The data should be backed up regularly and older backups should be kept in case the most recent backup can't be recovered.

The programs must always be started in the following order: Server, Database, POS. Make sure to wait for the Database to show it's pop-up window that it is ready before logging in the POS.

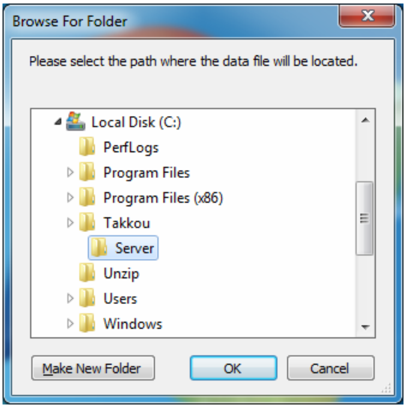
The CD (or the extracted downloaded file) includes 3 directories. One for each program. Install the programs in the following order: Server, Database and POS.

The programs require the Microsoft .NET framework. If it is not installed on your computer it will be downloaded and installed by the Takkou installers. Install only one program at a time starting with the Server.

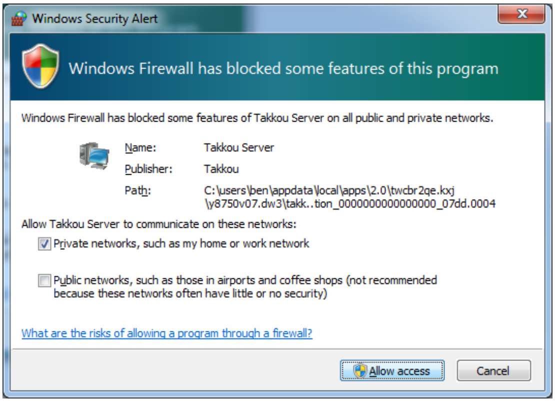
Installing Takkou Server

Go in the Server installation directory and double-click on “Setup” or “Setup.exe”. Windows may ask for your permission to install the software. Click on “Install” to continue. Do this for the three Takkou programs when installing each one.

The server will ask for a location where it will store it’s data. We recommend to make a folder for Takkou data and a sub-folder for each Takkou program (Server, Database and POS).



The Windows firewall may ask for permission for the Server. Click on “Allow Access” to continue.



Once the server is started you can install the database.

The server’s main window (double-click the Server icon to show it’s window) will show the connected users. Once the Database and the POS are started their connection status should appear as “connected” in the Server’s main window.

Installing Takkou Database

If you are going to use a web server like xampp make sure to install it before installing the Database program. Once the server is installed you will be able to tell the Database to use the local web server's directory ("c:\xampp\htdocs\MyStore\" for example) to store your local web files.

Go in the Database installation directory and double-click on "Setup" or "Setup.exe". The database will ask for a location where it will store it's data.

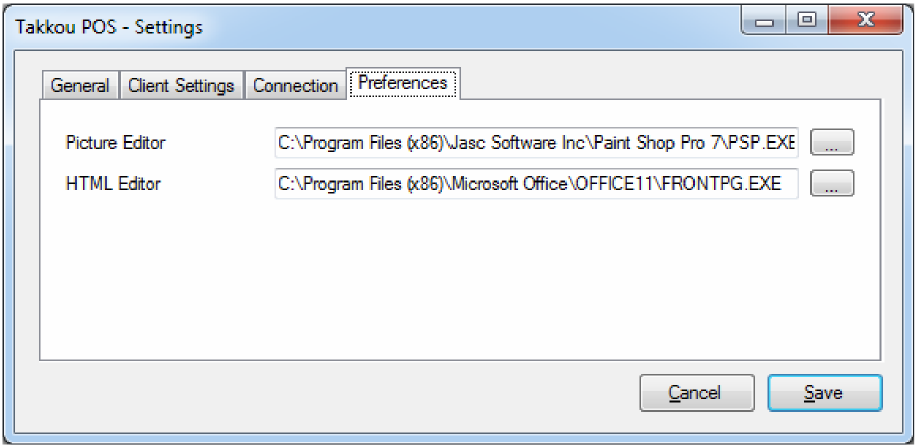
After the database is started you will have to enter minimal informations for the program to function. If you are not sure about what information to enter, please refer to the help below the information fields in the database setup screens. When all the informations have been entered the Database will restart. **Once it has restarted you will have to upload the local web files from the local web files directory you have specified to your web site.** To do this you can use a free FTP client like FileZilla. Once this is done the Database will be able to synchronize the files on it's own.

Once the database is started and ready you can install the POS.

Installing Takkou POS

Go in the POS installation directory and double-click on “Setup” or “Setup.exe”. The POS will ask for a location where it will store it’s data. Once the POS is started it will ask you to enter your ID and password that was entered in the Database setup.

You can select a picture and html editor by going in the configuration menu (configure) from the file menu. If the configuration menu is not enabled, you can disconnect from the server by clicking on the disconnect menu item in the file menu.



The Preferences tab allows you to select a picture and a html editor. Click on Save once the change has been made. You can close and restart the POS.

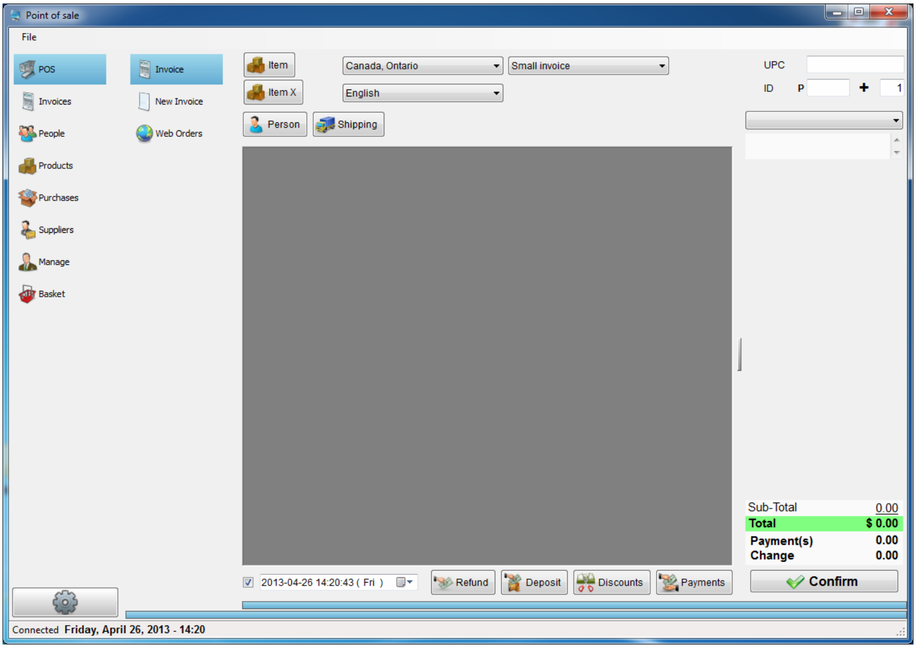
Uninstalling the software

If you need to remove the Takkou software, close the POS, Database and Server. Once they are stopped go into the Windows Control Panel and choose uninstall a program (Add / Remove Programs in Windows XP) and uninstall the three Takkou programs.

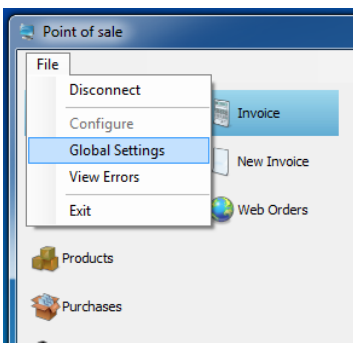
When a new version of Takkou is available, make sure to uninstall the three Takkou programs before installing the new version.

Brief introduction to the POS

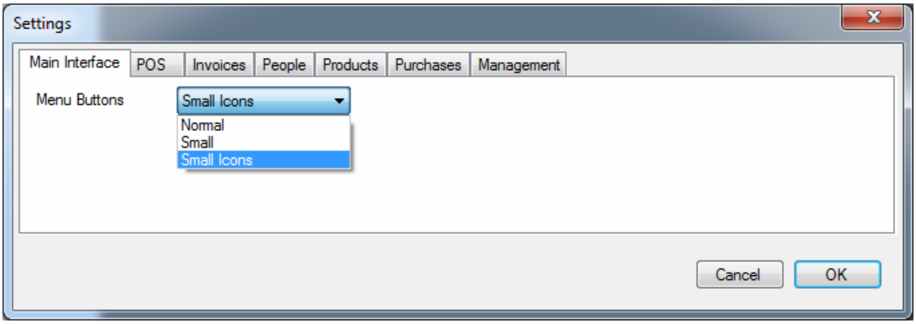
The main interface



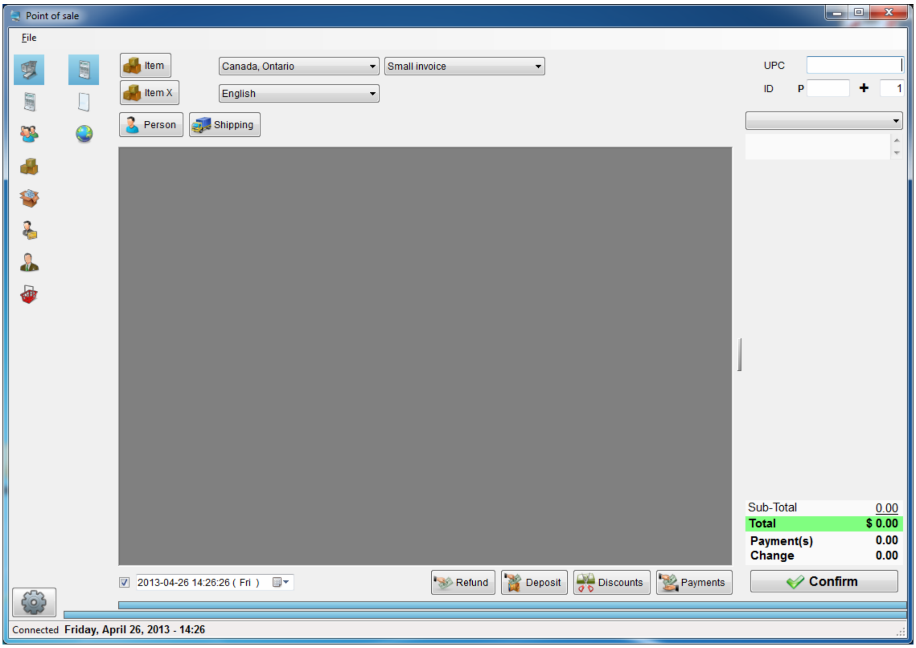
If your screen is not large you can start by going in the File menu and select “Global Settings”:



Once the menu has been opened, select each tab and select “Small Icons” for “Menu Buttons” on every tab. Then click “OK”.



Once you have set all the menu buttons to “Small Icons” the POS menus on the left will look like the following screenshot and you will have more space to work.



The vertical list of icons on the left are the main menu icons. If you hide the icon labels like in this screenshot you can know what section each icon represents by moving the mouse over an icon and not moving the mouse for a few seconds.

The vertical list of icons to the main menu are the sub-menu icons. The selected icons are of a different background color so you can quickly know where you are in the POS. The gear button on the bottom-left is the button used to enable or disable the edit mode. This allow the POS interface to remain clean when not editing items.

The blue lines near the bottom of the window are where notes can be entered. Notes entered in the bottom line will be shown in all the POS sections while the shorter blue line will only be show when you are in the same section of the main menu. This allows to enter notes specific to a section or to the whole POS.

Button icons

Different button icons represent different functions. Please note that the menu buttons (like the basket menu button, not to be confused with the "send this item to the basket" button) are not represented in this table.

Here are what each button icon represents:

Add	Remove (does not delete)
Edit	Print
Delete	Add to the invoice
Show / go to this item	Send this item to the basket
Go to this person	Refresh
Save to file	Set as default billing address
Find duplicates	Set as default shipping address

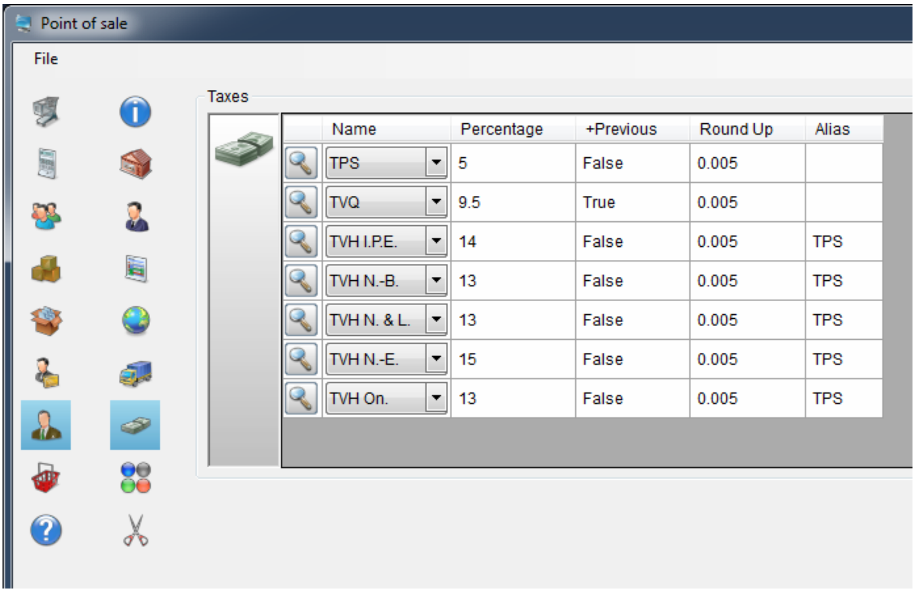
Adding required informations

Before you start using Takkou you will have to enter tax and shipping informations.

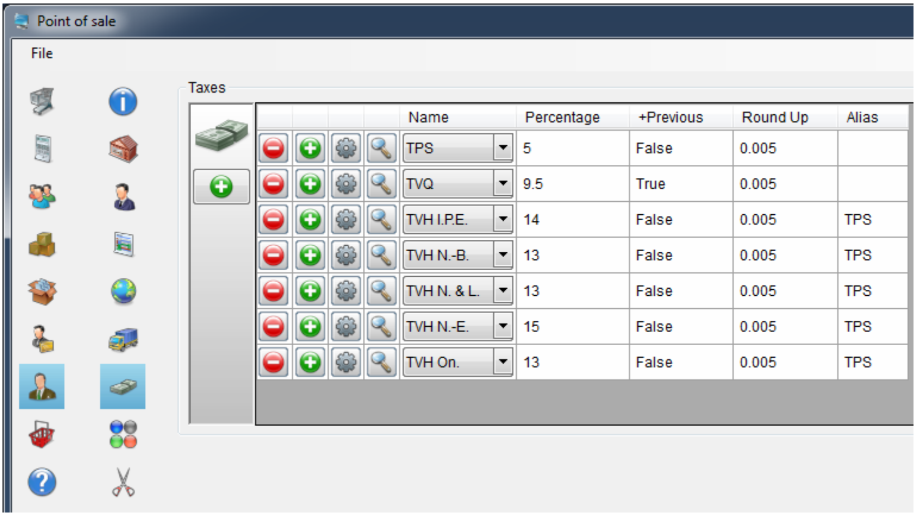
Please note that when adding numerical values always use the dot (“.”) character as the decimal separator and never enter thousand separators.

Adding Taxes

To add taxes, go in the taxes sub-section of the management section. This screenshot shows the menu and sub-menu (on the left) icons that you will need to click to get there:



To add the taxes you will have to enable the edit mode if it is not already enabled. To do so, click on the Edit Mode button  on the bottom left of the POS window. After the edit mode has been enabled you will see more buttons in the interface.

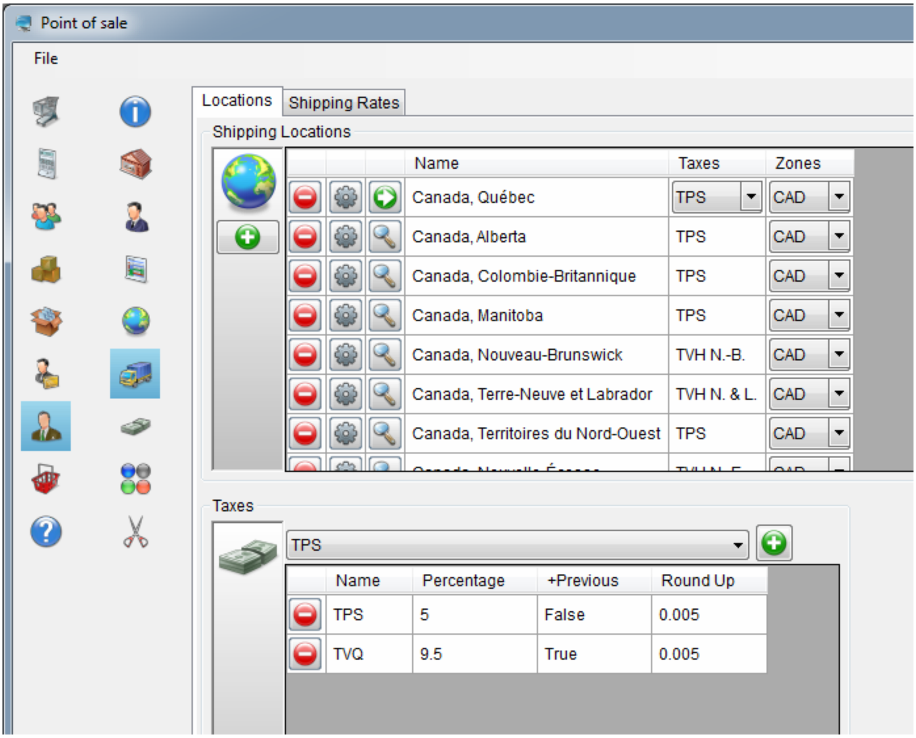


The “+” button under the “taxes” icon allows you to add a tax. Please note that you do not need to add a tax to each state or province. In the above screen shot, we see that there is a GST (TPS) tax for the whole Canada and a tax for the provinces that require an additional tax. Provinces that have the same rates could also be grouped or left as individual taxes for clarity as shown in the screenshot. The TVH N.-B., TVH N. & L. and TVH On. could have been grouped as TVH. Just make sure that each tax has a different name.

For more informations on managing taxes, refer to the Managing taxes section of this document.

Adding shipping locations

To add shipping locations, go in the shipping sub-section of the management section.



Shipping locations don't have to enumerate every state or province where you will ship to. You can add a location for your state or province and add a location for the rest of the country and a location for US / Canada (depending if you are in the US or Canada) and international shipments.

Canadian locations are automatically added when installing the Takkou Database. Generic shipping rates are automatically added for the US and Canada when installing the Database. For the US we recommend adding a location for the state where you are located and adding a location for the rest of the US. This will simplify things for you and for your customers as they will only have a few locations to choose from when purchasing your products.

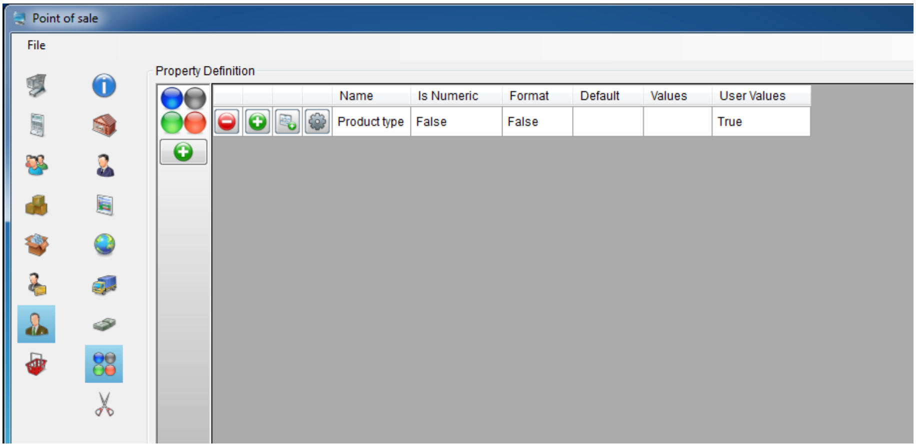
You will have to add a tax where required. To do so, click on the "show" button of a location, select a tax to add and click on the "+" button. The tax will be added to the location. You will also have to add the shipping rates zones to the locations. To do so, click on the "edit" button of a location and select and add zones when editing the location.

For more informations on shipping locations and rates, refer to the managing shipping rates and locations of this document.

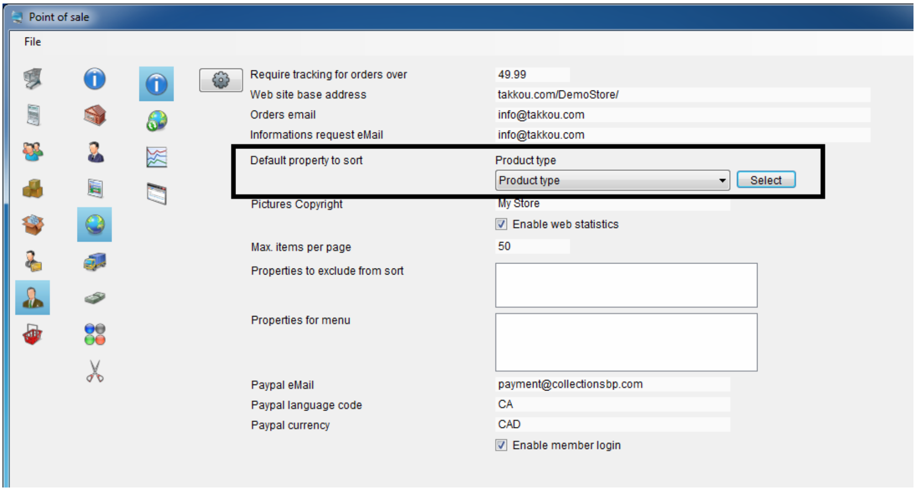
Adding a Property Definition

Property definitions are used to differentiate products. Properties Definitions can be Product Type, Color, Scale, Material Type, or any other defining characteristic of your products.

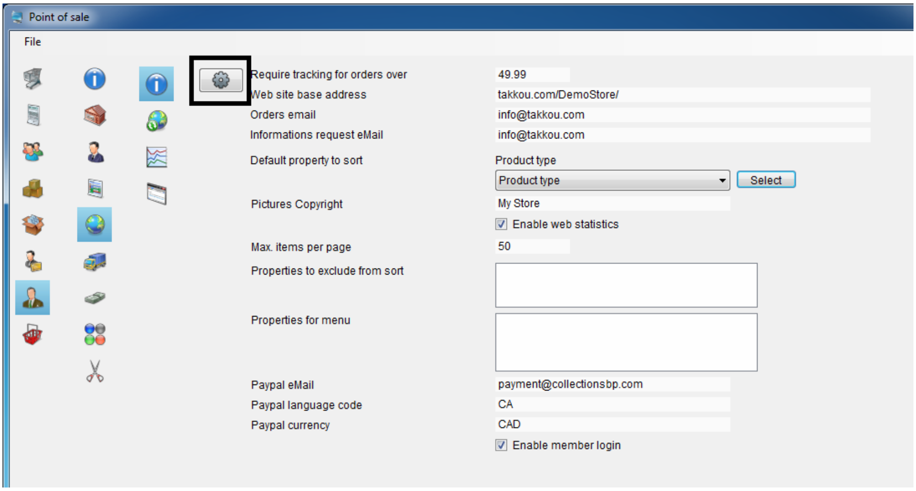
To use Takkou you must at least have one property definition. You can go in the properties section of the management menu and add a property definition “Product type”.



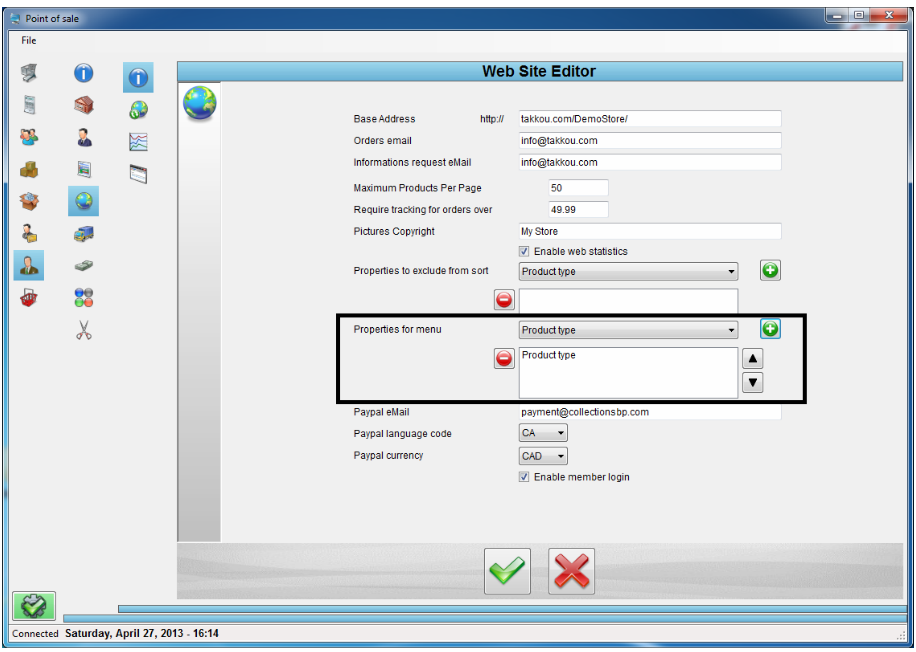
To do so, click on the “+” button under the properties icon. Edit the property with the name “Product type” and click on the check button to confirm. The property will now appear. Now go in the web site section of the management section.



Click on the “Select” button that is highlighted by a black rectangle in this screenshot. This tells Takkou to use this property as the default property to show on the web site. Now click on the edit button:



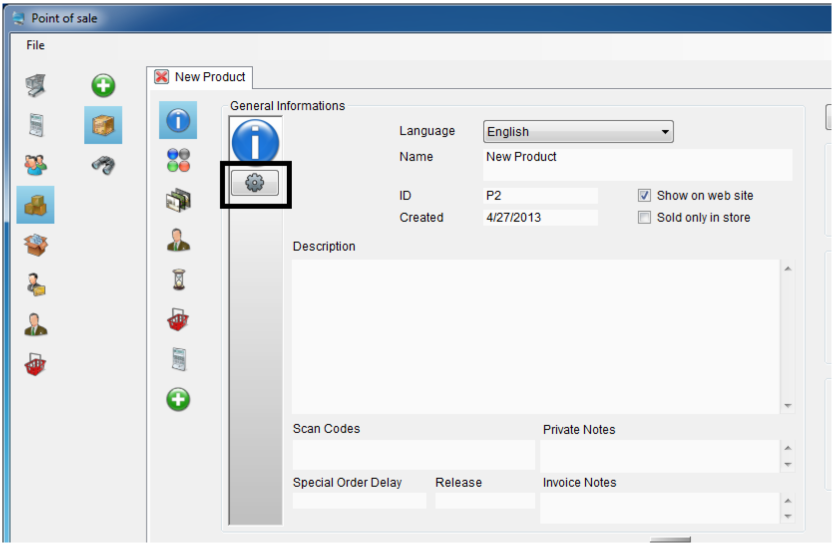
This will get you to the web site general informations editor. Add the property “Product type” to the “Properties for menu” list by clicking on the “Add” button to the right of the property name:



Testing the installation

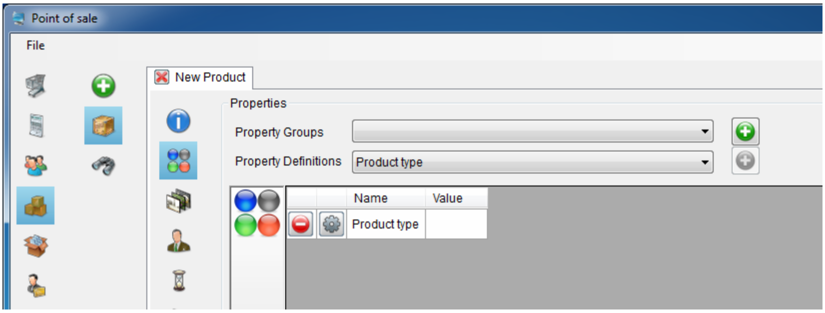
Adding a test product

To test the web site, add a test products. To do so, go in the products section and click on the icon to add a product (the “+” icon in the products sub menu). Make that the edit mode is enabled (the “gear” button on the bottom left corner of the POS window).



To edit the product’s general informations, click on the edit icon under the larger informations icon in the “General Informations” group. Enter a name and a test description. Once this is done, click on the large check to confirm the edit. Then edit the in-stock quantity, price and dimensions by clicking on the corresponding edit buttons. Make sure to enter dimensions as this will allow the web site to calculate shipping rates.

Once you have entered the basic product’s informations, go in the product’s properties section.



Click on the “Add” button to the right of the Property Definitions selector. Once clicked the property will appear in the product’s properties grid like on the above screenshot.

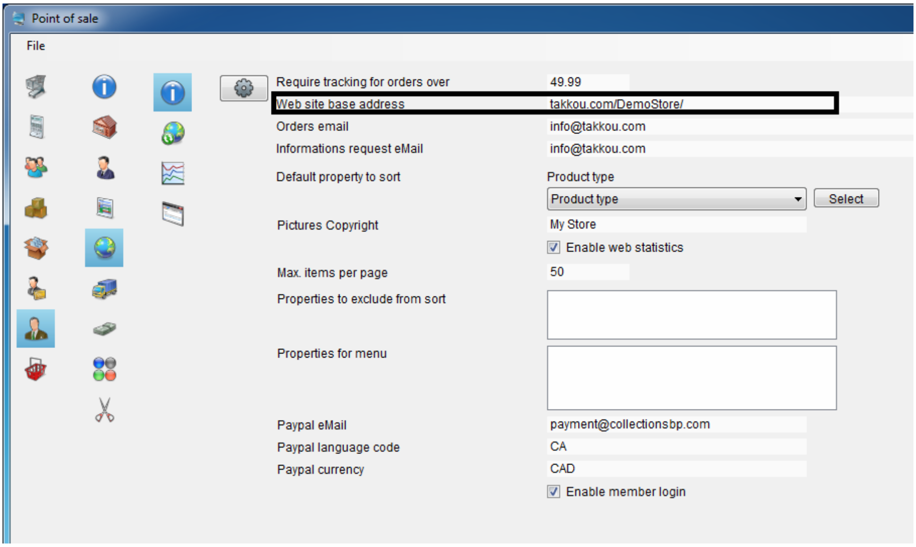
The “Add” button will then be disabled as a property can only appear once in each product.

Now click on the edit button to the left of the added property and enter a value “Shoes” for example and click on the check button to confirm. The change will appear in the product’s properties grid.

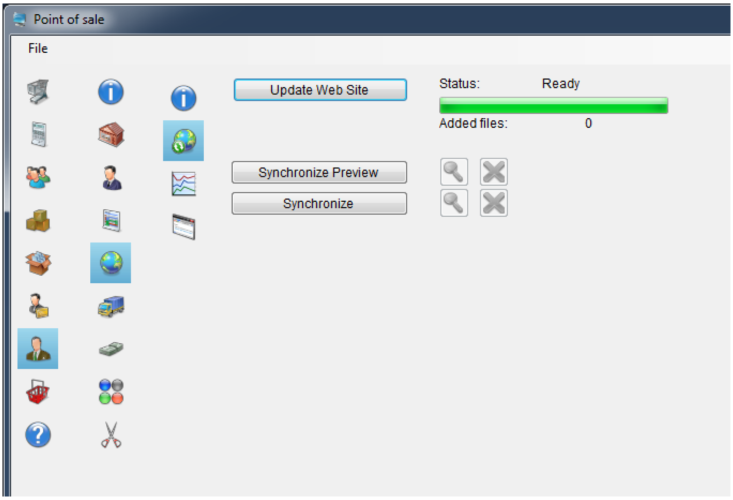
Now go in the pictures section of the product and add a picture by clicking on the “Add” button. You will be able to open a file (must be a .jpg file). We recommend using a maximum picture size of 600 x 600 to fit most screens.

Testing the web synchronization

Once you have installed the Server, Database, POS and added the required informations you will be able to verify that everything is in order. Start by testing the web synchronization.



To do so, go in the informations section of the web site section of the management section. Verify that the web site base address is correct. This is the web address that visitors will go to when visiting your web site. If you followed the installation instructions the local files should now also be at this location on your web site. Then go in the synchronization section.



Click on the “Update Web Site” button and the local files will be updated with the new informations (taxes, shipping locations and rates and the new product. Once the status shows “Ready” (it should take a maximum of about a second or two), click on “Synchronize Preview”. After a few seconds the “Show” button to the right of the “Synchronize Preview” button should be enabled and clicking it should show the list of files to be synchronized.

If everything went well, you should see a list of directories and files to be added. If there is nothing to do, either you have uploaded the files after the Update Web Site and there is nothing to synchronize or the Database can’t connect to the web site. In the latter case, verify that the required local files have been uploaded on the web site and that the address provided in the “Web site base address” is correct. Also verify that your internet connection is working correctly.

Once the Synchronize Preview is showing files or directories to synchronize you can synchronize them by clicking on the Synchronize button.

Testing the web site

Once the synchronization has been made you should be able to view your Takkou web site on your web site or on your local computer if you use a local web server like xampp (your files will have to be located in a sub-directory of the “htdocs” sub-directory of xampp, see the xampp documentation for more informations).

Server, Database, POS

Normally you will not have to use the Server, Database and POS File menus. When you install the programs they are automatically configured to work together.

The Database Commands menu can be used to update the website without opening the POS. This will not synchronize the website. The Clean database menu can be used to clean the database when the deleted records is over 10%. The Database will create a backup of the Database data file (POS Database.txt) before cleaning the file.

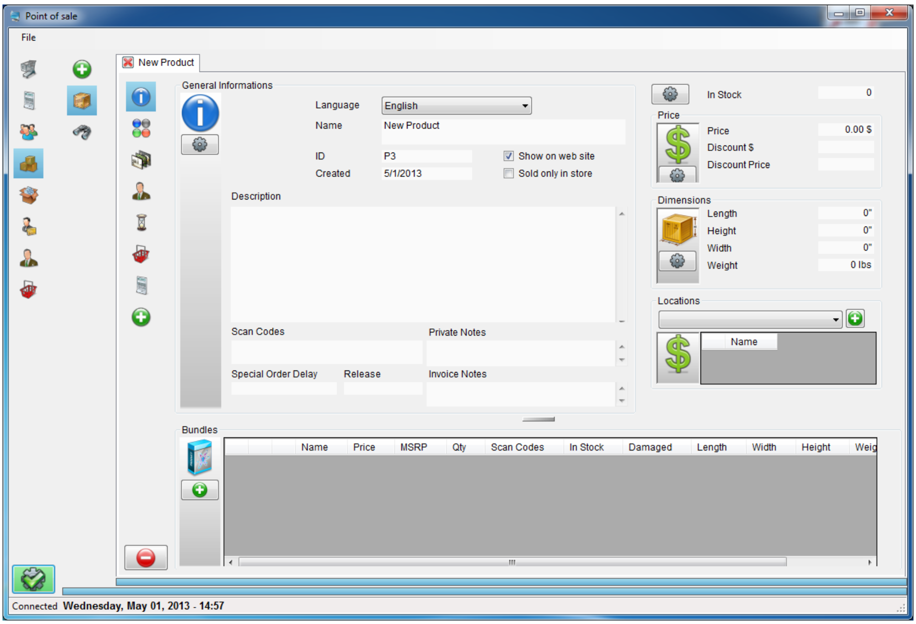
You should backup the Database data folder from time to time and keep the backups archived in case a previous backup cannot be recovered.

Managing products

Introduction

When adding a product you should at least add the name, description, in stock quantity, price, dimensions, properties and picture.

To add a product, go in the products section by clicking on it's icon  in the left menu. Once in the section, click the add button. You will be asked to confirm that you want to add a product. Click on "yes".

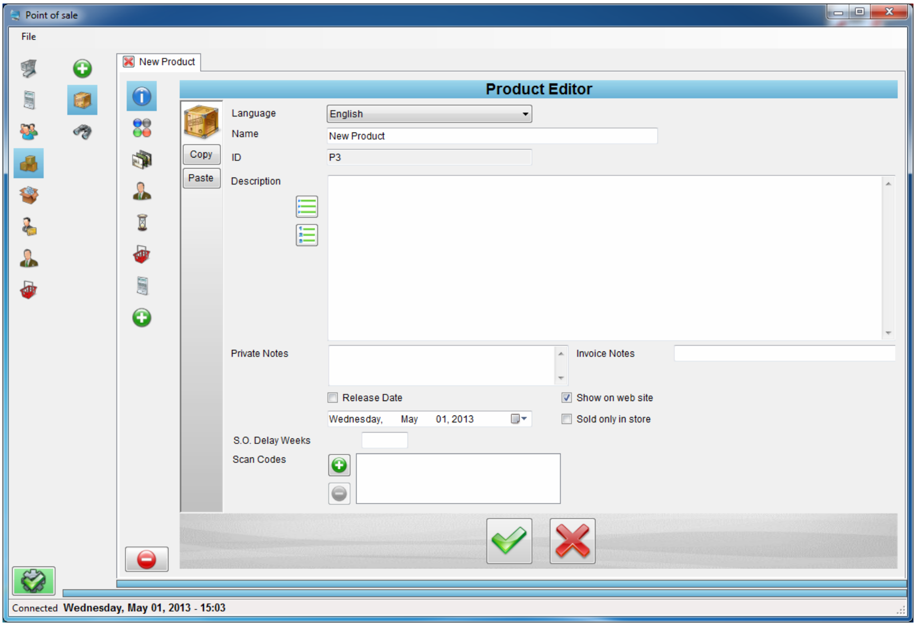


You now are presented with a new product. Enable the edit mode if it is not already enabled by clicking on the bottom-left gear icon. Now you can edit the product's informations by clicking on the corresponding gear icons for the information you want to edit.

From the product's general informations section you can edit the following items:

General Informations
In stock quantity
Price (including rebates and member prices)
Dimensions
Locations (where the product is stores in your inventory)
Bundles (for items sold in cases for example)

Product general informations



If you have more than one language for the POS and website you will be able to enter a product's name and description for each language. To do so, click on the language selector in the product editor and select the language for which you want to make the modifications.

In the product editor you can add numbered or bulleted items in the product's description by clicking on the bulleted list or numbered list buttons that are located to the left of the product description. You will see the following text:
ITEM
ITEM
ITEM
ITEM
ITEM
All you have to do is replace the word "ITEM" with what you want for that list item. If you need more items in the list, just copy the text "
ITEM
" and paste it where you want the new item. Each item must start with "
" and end with "
".

The "Private Notes" section is a place where you can add notes for the product that will not appear on invoices. The "Invoice Notes" are notes that will appear on the large invoices. Try to keep the notes short like for example: "No returns for this product".

If the product is scheduled to be sold in store at a latter date put a check in front of the "Release Date" and enter the date under the check.

If the product can be ordered but will incur a delay before it arrives in store you can put a number of weeks in the "S.O. Delay Weeks" (Special order).

If you don't want the product to appear on the web site, remove the check from the "Show on web site" check.

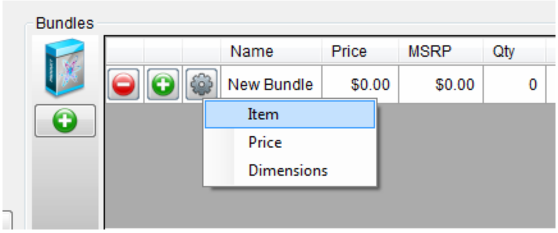
If the product is only sold in store, put a check in the "Sold only in store" check box.

You can add as many scan codes as you want with the Add button in the “Scan Codes” section. If your product is sold in quantities like cases, do not put the case scan code here as this is only the scan codes for the product when sold as a single product. You can add case scan codes in the bundles section of the product.

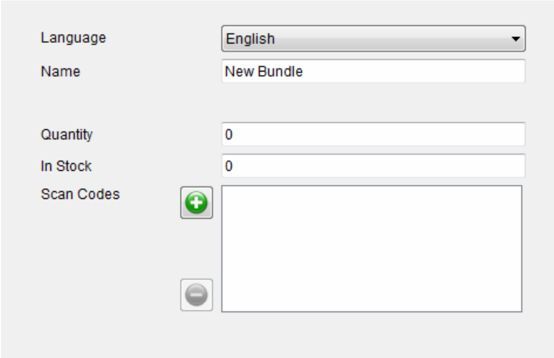
Product bundles

The product bundles are used when you sell products in quantities like boxes or cases of the same item.

To add a bundle, click on the Add button in the bundles section. A new bundle will be created. To edit the bundle informations, click on the Edit button of the bundle you want to modify.



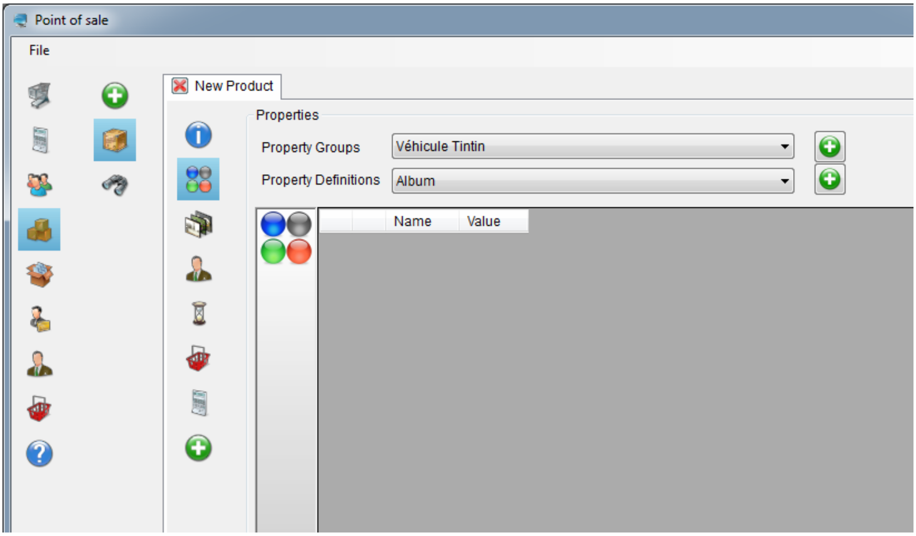
You can choose to edit the bundle’s general informations (“Item”), it’s price or dimensions. You must fill all the bundle’s informations (the scan codes are optional).



In the bundle Item editor you can enter the bundle’s name, the quantity of single products that are in the bundle, for example enter “6” for a case that contains 6 of the product.

Enter the in stock quantity and the scan code if this bundle has one.

Product properties



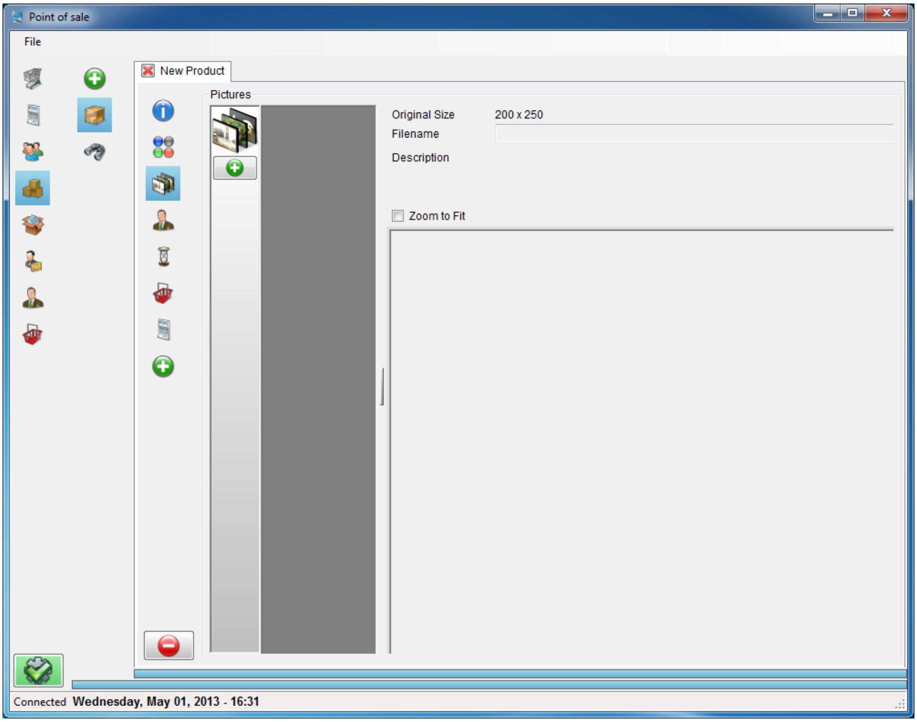
Product properties are used on the web site for listing and sorting products. A product that has no property will not appear on the web site. The properties must also be added to the website's Properties for menu (if they are not already there) for them to appear on the website.

Properties are defining characteristics of products like color, size, scale, material type. You can have multiple properties for each product but each product must only have one of each property.

Property groups are multiple properties that can be added by a single click on the Add property group button. You can add a property group even if a property of this group is already in the product's properties. The property that is already in the list will not be added a second time.

To add property definitions (the base of properties) and property groups go in the properties section of the management section. See the management section of this manual for more informations on managing properties.

Product pictures



You can add one or more pictures for each product. To do so, go in the product's pictures section. Once there click on the "Add" button to add a picture. You can either paste a picture from the clipboard, load a picture file (must be .jpg format) or load a picture from a camera. We recommend using a maximum picture size of 600 x 600 to fit most screens.

You can add a short picture description if needed.

If you have configured a picture editor you can click on the edit button in the picture editor to edit the picture.

Product costs and supplier codes

If you want to know your inventory cost you will have to enter the cost of each product in the "Private Data" section of the product. To add a cost, click on the "Add" button in the cost section then edit the quantity and price. Please note that costs are based on a single product and not cases for example if you also sell products in cases. If a case contains 6 of this product, enter 6 for the quantity if you only have a case in stock.

You can add multiple costs if you cost changes of if you have received more of the product to sell.

You can enter a supplier code for the product by clicking on the supplier's name and clicking on the "Add" button to the right of the supplier name. You can then edit the supplier codes. Please note that you will need to add suppliers in the Suppliers section before you can add it's name in the product's Supplier codes. See the Managing suppliers section of this manual for more informations.

Product history

You can see the quantities sold of the product in the product's history section.

Add to basket

If you want quick access to a product without having to search for it, you can use the product's "Add to basket" button and the product will be put in the POS' basket. You can then go in the basket, click on the product and click on the basket's "Show" button to show the product. This can be useful when you need to see a particular product often.

Add to invoice

You can add the product to the current invoice by clicking on the product's "Add to invoice" button.

Add copy

When adding similar products you can click on a product's "Add Copy" button to add a copy of the product and modify it as a new product. The product's basic informations will have been duplicated. Pictures are not copied as each product should have a unique picture for the customers to easily differentiate them.

Product search

To search for one or more products, click on the "Search" button in the product section. Click on the "Get All the Products" to get all the products. This can be useful when you have a few products. But when you have lots of products you will have to use the search options.

To perform a search, select what you want to search (Name, ID, Scan codes, …) then select the comparison (<, >, =, contains, excludes, …) and click the Search button at the top of the search section. You can perform more complex searches by adding a search parameter by clicking on the "and" or "or" buttons. To remove a search parameter, click on it's "X" button.

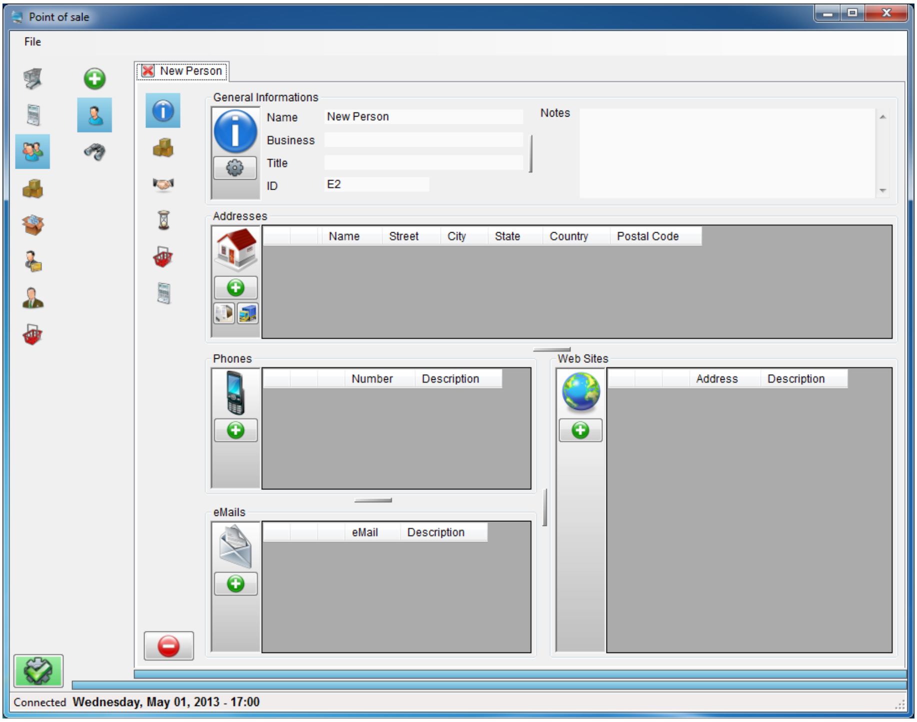
Managing people

Introduction

The people section of the POS allows you to keep contact informations for your customers, suppliers and anyone that you need to keep contact informations.

The only required information is the person's name. It is recommended to add at least a phone number or an address in case different persons have the same name. It will be easier to differentiate them. Addresses can also be used when billing a person.

To add a person, go in the people section by clicking on it's icon  in the left menu. Once in the section, click the add button in the sub menu. You will be asked to confirm that you want to add a person. Click on "yes".

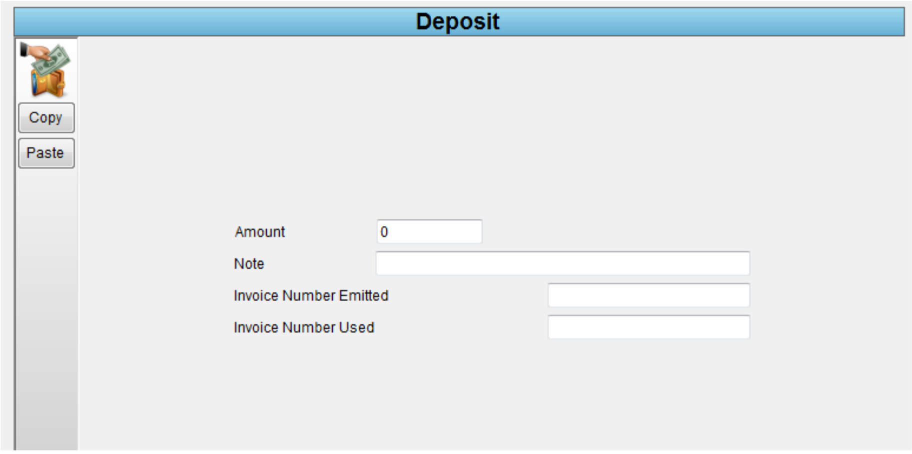


Once a person record has been added you can edit it's informations. To edit the person's general informations click on the corresponding button. You can also add addresses, phone numbers, emails and websites. To select the person's default shipping and billing addresses click on the address in the person's addresses section and then click on the Set as default billing address or Set as default shipping address button under the Add button.

Deposits

The deposits section of the person shows deposits made by this person. Deposits can be automatically managed by the POS or you can manually manage them. It is recommended to let the POS manage the deposits automatically.

You can add a deposit and edit it in the deposit editor.



The note can be the product's ID or name that the deposit was made for. The Invoice Number Emitted must be the invoice number on which the deposit was made and the Invoice Number used is the invoice number of the invoice on which the deposit was used.

Club member informations

The person's Club member informations section is where the login information of the website is managed. The login name is used to login on the website. The ID of the person will be automatically added to the beginning of the login name but the person must enter the ID and name when login-in on the website. The password is case-sensitive. The member login must be set to active to allow the person to login on the website.

When a person is logged in the website the website will show the person's business information. So you will have to enter something in the business field of the person's general informations. If the person doesn't have a business name you can enter the person's name in the business field.

History

The person's history shows the list of invoices associated to this person. To view an invoice from a person's history double-click on the invoice to show from the history list. To associate an invoice to a person you must add the person to the invoice when the invoice is made. You will need to create the person before making an invoice to the person. You can choose to associate or not an invoice to a person.

Add to basket

You can add a person to the basket for future reference by clicking on the person’s basket icon.

Add to invoice

You can associate a person to an invoice when creating an invoice by clicking on the person’s Add to invoice button.

Person Search

The person search is almost identical to the product search. Please refer to the Product search of the manual.

Managing suppliers

If you want to manage your purchases in Takkou you will have to first add suppliers in the suppliers section.

To add a supplier go in the supplier section. Click on the Add button and click on Yes. You can now edit the supplier’s name and add default taxes for this supplier.

Once a supplier has been added you can add purchases from this supplier. See the Managing purchases section of this manual.

Managing purchases

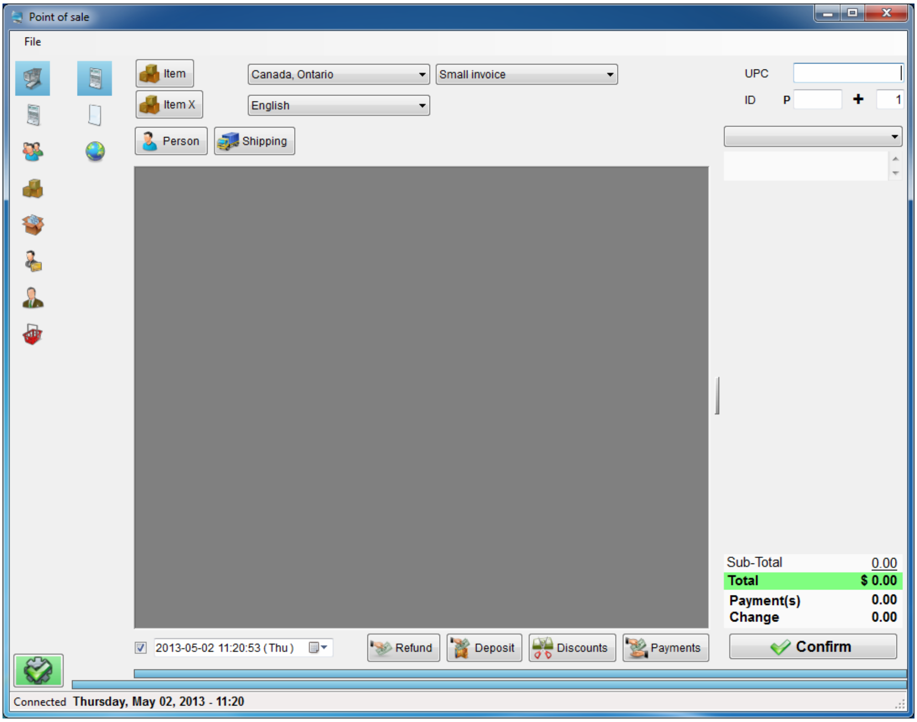
Before adding a purchase the purchase’s supplier must be added in the suppliers section if it is not already there.

To add a purchase go in the purchases section and click on the Add button. You will be prompted to enter the purchase’s informations and the purchase will be added when you have clicked on the check at the bottom of the purchase editor.

The purchase category is used to group purchases together. You can create groups like for example “Inventory”, “Imported products”, “Phone and internet”, “Rent” or any other category that you need.

When you add a tax for a purchase click on the name column and start typing the name to edit the name and click on the amount column and start typing the amount to edit the amount.

Creating invoices



When the POS is started you are in the invoice section. You can start adding products to the invoice. You can use the Erase invoice button to erase the current invoice and not record it.

General informations

If you want to make an invoice for a different location than the default location, select the location before adding products. This will insure that if you modify a product's taxes the location modification will not reset the product's taxes.

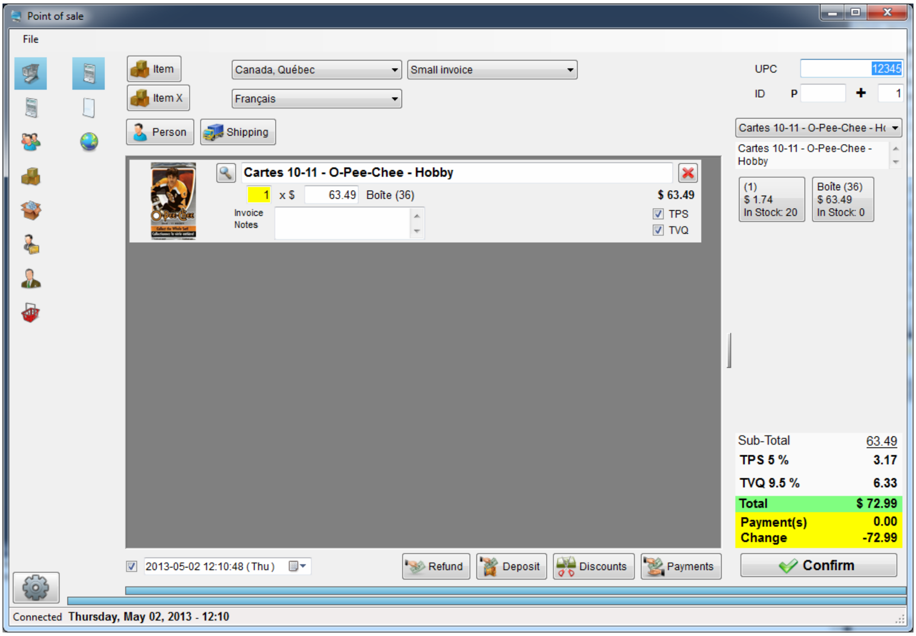
You can also select the invoice template and the language if you have more than one of each.

Adding products

You can add a product by scanning with a barcode scanner if you have entered scan codes for the products. You can also add a product by entering it's ID code (without the "P" at the beginning) in the ID field and pressing the Enter key on your keyboard. You can also add a product directly from the product or the product section's search section. You can use the Item button to quickly get to the product search section. To add a product that is not in the database you can use the Item X button and modify the added product's name and price.

You can use the arrow buttons on each product to reorder the products of the invoice.

If you want to sell more than one of a product you can enter a different quantity than the “1” in the “+” field. You can move to the “+” field by pressing the “+” key on your keyboard when you are in the UPC or the ID field. Enter the new quantity to add then press Enter. You will return to the previous field and then you can scan the product.



If the product you add to the invoice also has bundles you will be able to add a bundle by clicking on the corresponding bundle button. You can add a product that was previously invoiced by selecting it in the selection list under the ID field.

You can modify the quantity of a product to sell by modifying the quantity under the name of the product. If the “in stock” quantity of the product is less than the quantity entered in the invoice for the product, the quantity field will have a yellow background color. Once you have modified the quantity of a product, press the Enter key to confirm the modification.

To modify the price of a product for the invoice, modify the price under the product name and press the Enter key to confirm the modification.

You can check or uncheck the product’s taxes for products that have different tax applicability.

To remove a product from the invoice, click on the product’s Close button “X”.

Person and shipping informations

To associate a person to the invoice click on the Person button and you will be taken to the Search person section. You can search for the person you want to add to the invoice and click on the person’s Add to invoice button from the search section or from the person’s menu.

Once a person has been added the shipping address will be automatically added. All you will have to add is the shipping amount. You can remove the shipping information if the person will pick up the products in store.

You can modify the shipping informations by clicking on the shipping's edit button. If there is no shipping informations, you can add them by clicking on the shipping button.

Discounts

To add a discount to an invoice, click on the Discount button and enter the discount name. If the discount is a coupon you can enter the coupon code in the reference field.

Payments

Once the invoice is ready to be paid, enter the payment section by clicking on the Payments button.

A payment will be automatically added. If the customer uses a different payment method than the method added by default, you can remove the payment and add a new one by clicking on the corresponding payment method from the payment method list. The amount will be automatically be adjusted for the remaining amount.

Once the payments have been entered you can confirm the invoice and it will be recorded.

The payment methods are managed in the store section of the management section. See Managing the store section of this manual for more informations.

Deposits

If a customer want to make a deposit, use the deposit button to add the deposit and enter the amount. Once the invoice has been confirmed the deposit will automatically be added to the person's deposits. When the person is ready to make the purchase and use the deposit, add the person to the invoice and the deposit will appear in the deposit grid of the payment section.

Refunding an invoice

To refund a previous invoice click on the Refund button and enter the invoice number to refund. You can remove products that are not to be refunded from the current invoice.

Invoices history

The invoice section allows you to view previously made invoices. You can find invoices by a month or a year. Once you have found the invoice you are looking for you can click on the Show button to go to the invoice tab.

In the invoice tab you can print the invoice. You should select the print template and language if you have more than one before printing.

If the invoice has a person associated with it you can go to the person informations by clicking on the person button that is located left of the person’s name.

Web orders

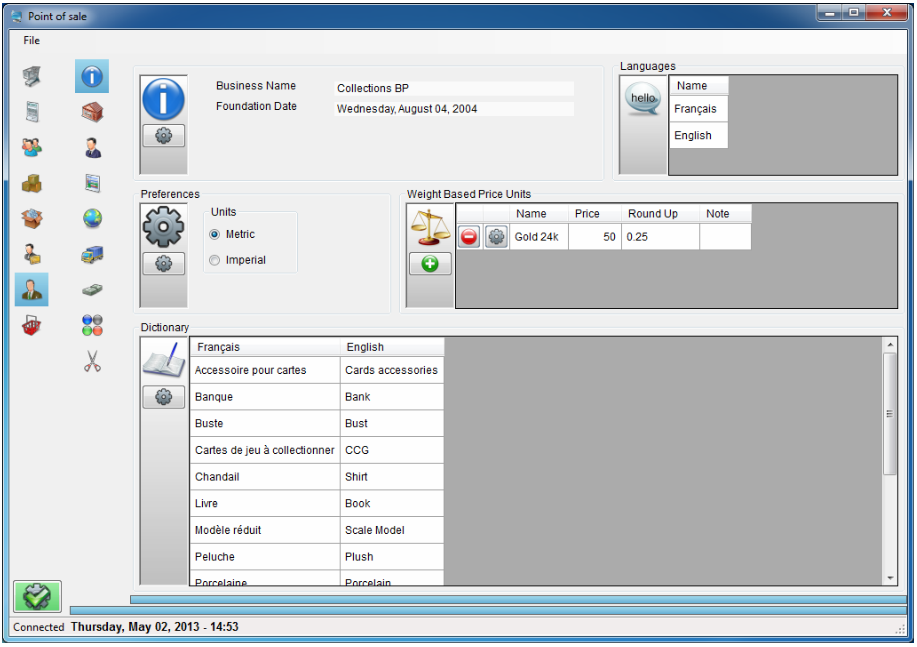
When a person has placed a web order you will find the order in the Web orders section of the POS section. You can view each order and create an invoice from the order. When you use the Add to invoice button most of the web order informations will automatically be added to the invoice. You will have to manually add the missing informations like shipping amount. You can verify that the total of the invoice is equal to the total of the web order to make sure that everything is correct in the invoice.

Once an order has been placed on the web site the corresponding quantities will be removed from the web catalogue. So if a customer buys a product that has only one in stock quantity the product will not be available for the next visitors.

If you want to remove the quantities purchased in a web order without making the invoice you can use the Process sold quantities button on the web order. This will remove the sold quantities from the products in the database.

You can use the Mark processed and Mark unprocessed buttons to mark the web order as having been processed or not. This can be useful if you want to keep a web order even after having invoiced it. But it is recommended to remove the web orders when processed.

Managing the business



The Management section contains general business informations and required informations for the POS and website.

General informations

In the general informations section you can select the default unit (metric or imperial).

The Weight based price units are units that can be used for products that are sold by weight like gold or silver jewelry (most merchants use fixed prices for these, but the possibility to use weight based prices is there).
You can use the weight units in the product's price section. You will have to put a check in the Weight based price, enter the product's weight, a percentage to add if needed and the unit to use (select the unit and click on the arrow to select it).

When you modify the Weight based price unit's price the products that are priced based on this unit will be adjusted based on the new price set.

The dictionary is used to translate the product's property values on the website for websites that have more than one language. For example, if you have a property "color" with the value of "blue" you should add it in the dictionary and add the translation "bleu" in the French column on the same row as the "blue" word.

Store

The store section of the management section contains informations about the store. The most important sections of the store are the Invoice templates, the Payment methods and the Shipping services.

When Takkou is installed invoice templates are automatically added. One (Small invoice) is for a thermal printer with a 3” paper and the other (Large invoice) is for a 8.5” x 11” printer. You should select the corresponding printer in the invoice template editor and adjust the margins according to your needs. If you only have one printer the invoices will be set to the printer by default.

Set the default invoice template to be used by clicking on the editor button to the left of “Default”.

You can print an invoice test with the printer button on each template line. Please note that the printed invoice will contain some informations that will not be based on your store. This is only to know if the invoices will print correctly, not to give you a full preview of the invoices that will be printed.

Sales representatives

In the sales representatives section you can select the sales representative and use the edit button to modify the Takkou POS login ID and password.

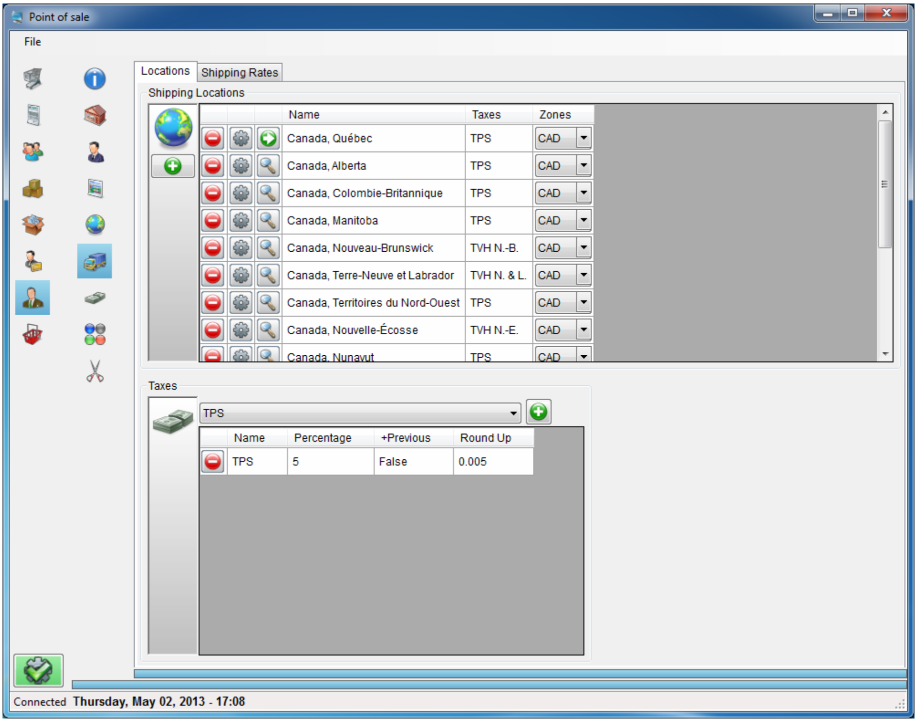
Reports

The reports section allows you to view the current inventory and sales reports. The sales’ Totals report shows the sales and purchases with taxes and the Difference report shows the difference between the sales and purchases.

At the end of the year you should export the inventory by viewing the inventory and clicking on the Save to file button. The file can then be imported in a software that can import TAB delimited files like Excel.

Shipping

The shipping section of the management section contains the shipping informations that is used in the POS invoicing section and the website.

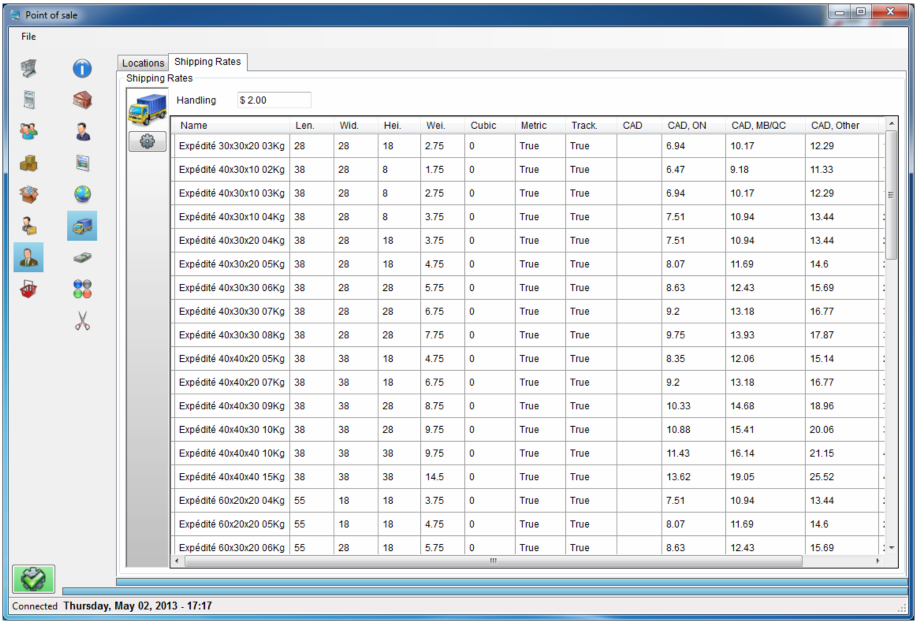


The locations section is the list of locations that you will ship to. To view a location, click on it's Show button.

Locations don't need to represent every single location (for example states) that you will ship to. For example you could create a location for your state and a location for the rest of the country. This will allow you to invoice the taxes of your state and not tax the other states. This will also simplify the location choices for your website visitors.

When adding a location you should ensure that the taxes are already created in the taxes section of the management section. See the taxes section of this manual for more information on creating taxes. Once this is done you can add the tax to a location. A tax can be used in more than one location.

The zones of a location refer to the Shipping rates section of the shipping section. Once you have created zones you can add them to a shipping location.

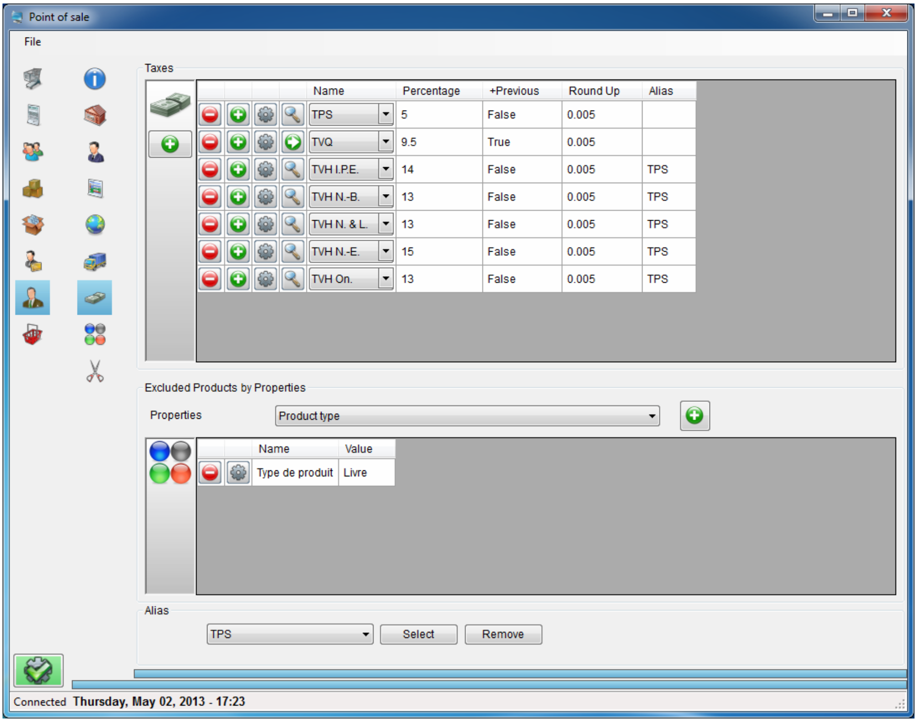


Name	Len.	Wid.	Hei.	Wei.	Cubic	Metric	Track.	CAD	CAD, ON	CAD, MB/QC	CAD, Other
Expédité 30x30x20 03Kg	28	28	18	2.75	0	True	True		6.94	10.17	12.29
Expédité 40x30x10 02Kg	38	28	8	1.75	0	True	True		6.47	9.18	11.33
Expédité 40x30x10 03Kg	38	28	8	2.75	0	True	True		6.94	10.17	12.29
Expédité 40x30x10 04Kg	38	28	8	3.75	0	True	True		7.51	10.94	13.44
Expédité 40x30x20 04Kg	38	28	18	3.75	0	True	True		7.51	10.94	13.44
Expédité 40x30x20 05Kg	38	28	18	4.75	0	True	True		8.07	11.69	14.6
Expédité 40x30x30 06Kg	38	28	28	5.75	0	True	True		8.63	12.43	15.69
Expédité 40x30x30 07Kg	38	28	28	6.75	0	True	True		9.2	13.18	16.77
Expédité 40x30x30 08Kg	38	28	28	7.75	0	True	True		9.75	13.93	17.87
Expédité 40x40x20 05Kg	38	38	18	4.75	0	True	True		8.35	12.06	15.14
Expédité 40x40x20 07Kg	38	38	18	6.75	0	True	True		9.2	13.18	16.77
Expédité 40x40x30 09Kg	38	38	28	8.75	0	True	True		10.33	14.68	18.96
Expédité 40x40x30 10Kg	38	38	28	9.75	0	True	True		10.88	15.41	20.06
Expédité 40x40x40 10Kg	38	38	38	9.75	0	True	True		11.43	16.14	21.15
Expédité 40x40x40 15Kg	38	38	38	14.5	0	True	True		13.62	19.05	25.52
Expédité 60x20x20 04Kg	55	18	18	3.75	0	True	True		7.51	10.94	13.44
Expédité 60x20x20 05Kg	55	18	18	4.75	0	True	True		8.07	11.69	14.6
Expédité 60x30x20 06Kg	55	28	18	5.75	0	True	True		8.63	12.43	15.69

The shipping rates section is where all the shipping rates are managed. The name is the name of the shipping that will appear on the website. The dimensions are the maximum size of the shipping rate. You should always enter a smaller dimension to account for the box and packing material. The cubic dimension is for rates that are based on a maximum cubic dimension. You should also enter a smaller dimension to account for the box and packing material.

The Track columns is used to determine whether the shipping will include tracking informations. The following columns are the shipping amount for each destination. If a shipping doesn't apply to a location leave the amount empty, do not enter a zero.

Taxes



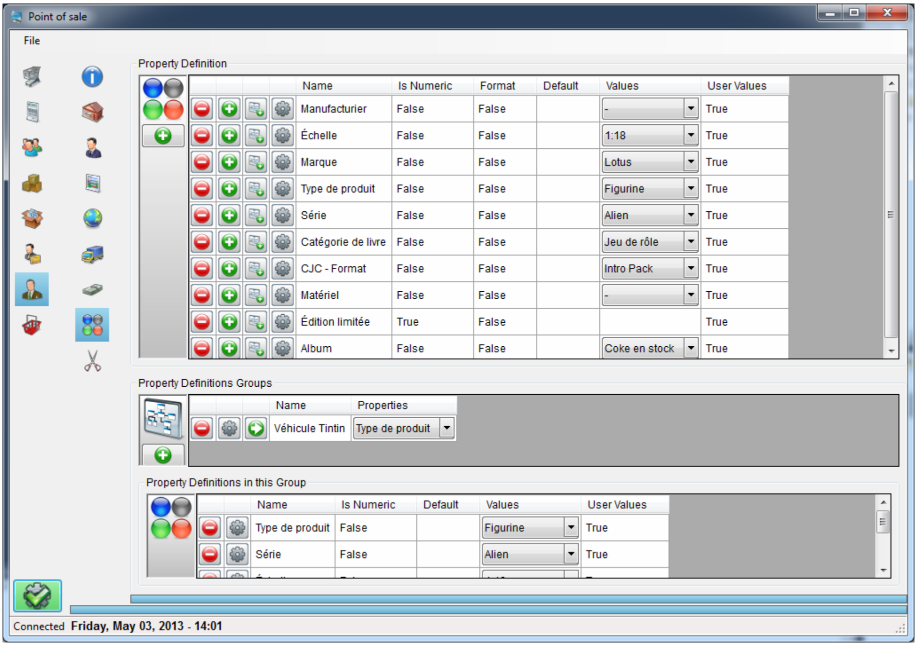
The taxes section contains all the taxes that will be used in different locations. You can exclude products from being taxed by excluding one of the product's property. For example, provincial taxes are not applied on books in Quebec. To exclude books from being taxes we only have to add the "product type" property and put the value of "book" in the tax fro which the exclusion applies. This will exclude all the product that have the property "product type" set to "book" from being taxed by the selected tax.

The "+Previous" value determines whether the previous tax amount will be included in the calculation of the tax. To include a previous tax amount in the calculation of a tax the tax must be added to a location after the tax to be applied first.,

The Round up value indicates the amount from which the tax will be rounded to. This value should normally be set to 0.005.

The tax alias is the name of the tax that should be used in the totals reports. In the example screenshot we can see that all the taxes outside of the Quebec tax (TVQ) and the federal tax (TPS) are to be shown as the federal tax (TPS).

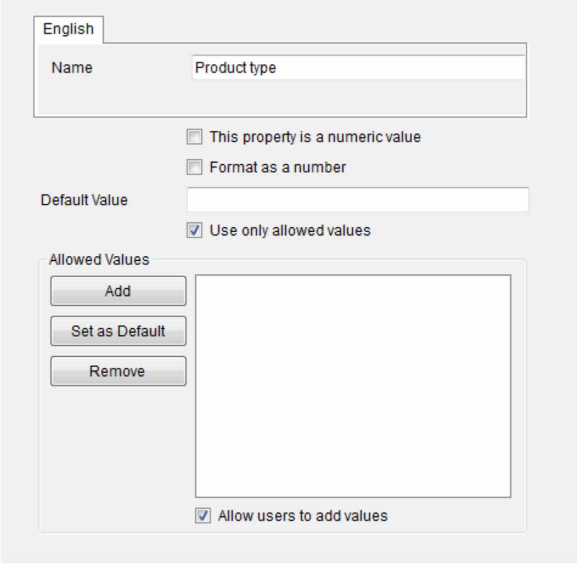
Properties



Properties are used to find and sort products on the website. Properties are defining characteristics of products like color, size, scale, material type. Property definitions are used to give some informations for each property. Property groups are multiple properties that are grouped together.

You can add a property definition by clicking the add button in the property definition section. Please note that if you remove a property definition it will also be removed from the products and property groups in which the property is used.

Click on the property's edit button to modify it.



You can enter a name for each language. If this property is a numeric value put a check a check in the corresponding checkbox. Also check the “Format as a number” if you want the property to be formatted with commas for the thousand separators.

When editing a product’s property you can enter any value or choose from a list of values. If you want to choose from a list of values put a check for “Use only allowed values” then add the values with the “Add” button. If you want a certain value to always be selected when adding this property select a property value and click on the “Set as Default”. You can also remove a property value by selecting it and clicking on the “Remove” button.

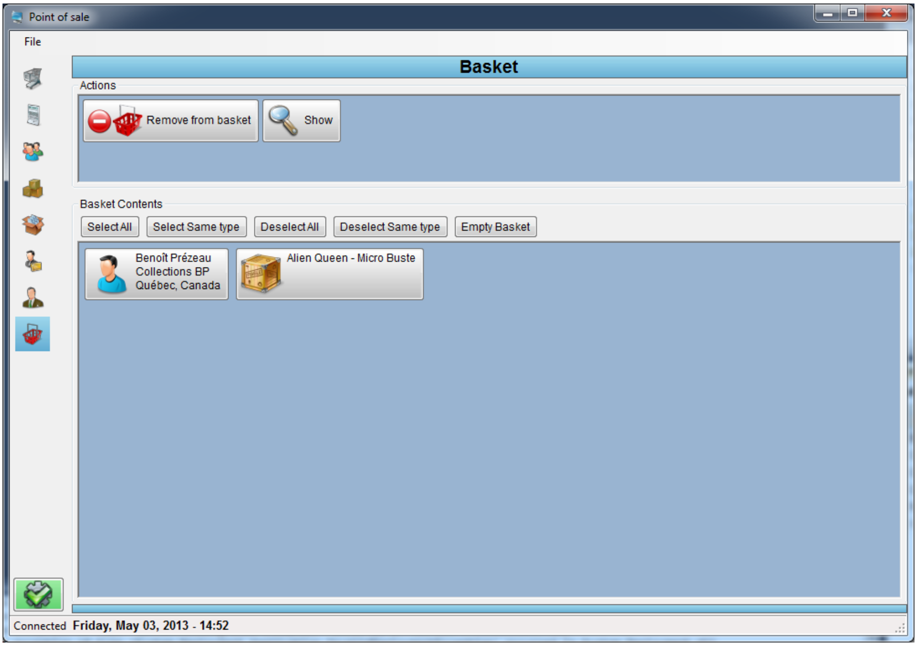
If you want to create a property group click on the “Add” button in the “Property Definitions Groups” section, edit the newly created property definition group, once you have finished editing the property group select it by clicking on the “Go to this item” of the group and then click on the “Add to group” button for each property that you want to add in the group.

Coupons

Coupon codes can be used in-store or on the website. In the coupon editor you can enter the coupon’s value, the minimum amount of the order for the coupon to be applicable, the coupon code and some notes (like the name of the person who gets the coupon if you give coupons to specific persons).

Once a coupon is used you can transfer the coupon from the Coupons section to the Used coupons section by clicking on the coupon’s Toggle button. This allows to know which coupons were used. You can also delete them if you don’t need to keep a history of the used coupons.

The basket

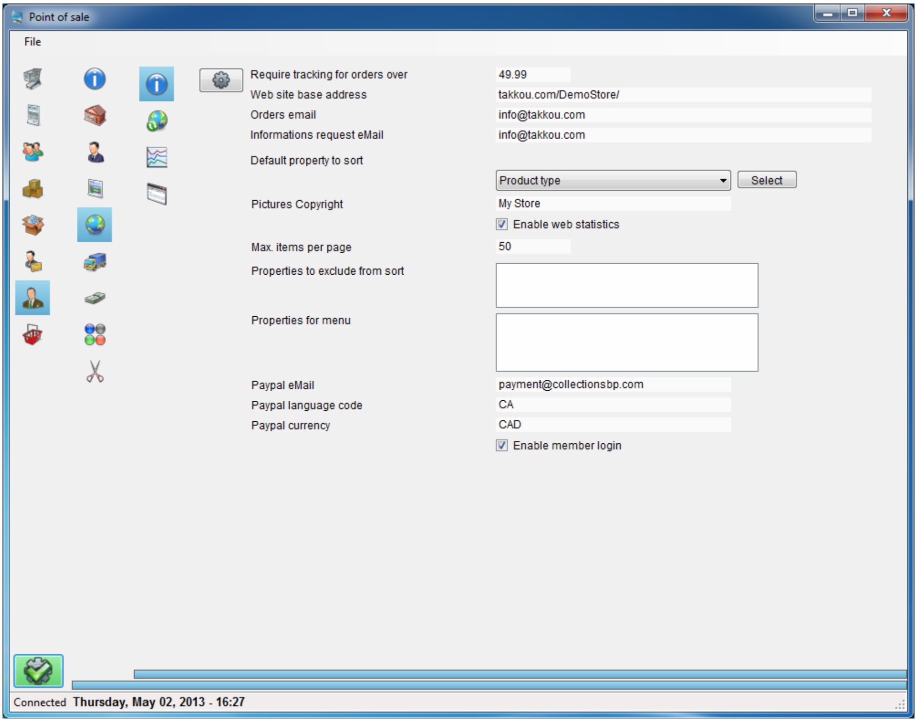


The basket is a place where you can keep items that you may need to view frequently when working. You can add persons or products. Once in the basket you can view the items in the basket by clicking on an item to select it and clicking on the Show button. You can remove an item from the basket by clicking on the Remove from basket button. This will only remove the item from the basket and will not delete it.

You can select all the items on the basket by clicking on the Select all button. If you have multiple items in the basket you can select one and select all the other items of the same type (person, product) by clicking on the Select same type. The Deselect all and Deselect same type buttons deselects all the items or the items of the same type. The Empty basket empties the basket.

Managing the website

General informations



The Require tracking for orders over field is the amount that will force tracking informations even if the product(s) ordered could be shipped in non-tracked mail. This will help insure that the package will arrive at the destination.

The Website base address is the address where the visitors of your website will go. This is where the website files are uploaded.

The orders email is the email where the web orders will be sent. You can send web orders to more than one address by separating each address with a comma followed by a space and the other email address.

The Informations request email is the email where informations requests will be emailed to.

The Default property to sort is the product property that will be sorted by default on the website. Select the property to use and click on the Select button to select it.

The pictures copyright is the text that will appear on each picture on the website. This does not apply to the thumbnails.

The Max. items per page is the number of products that will be shown on the main page (latest products).

The Properties to exclude from sort are properties that you want to include in products but that you don't want the website visitors to sort with. This can be useful for products that have multiple properties and will help reduce the properties to sort list on the website.

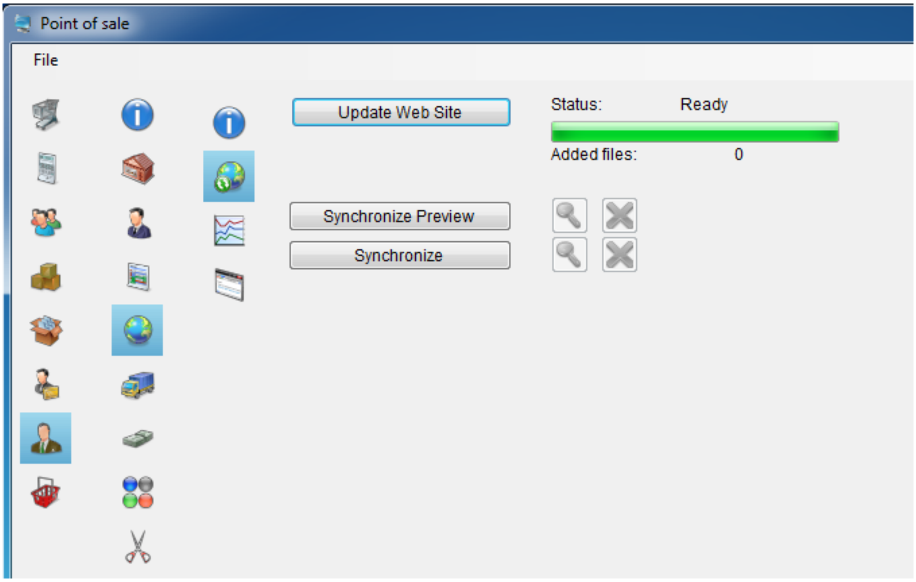
The Properties for menu are the properties that will be used in the website's menu.

The Paypal email is the email that will be used to receive Paypal payments.

Paypal language code and Paypal currency are used to identify the language and currency that will be used for Paypal payments.

The Enable member login check allows you to show or hide the member login section of the website. If you don't intend to offer memberships to your website you can hide the member login.

Website updater



The website updater section allows you to update the website informations and synchronize them with the website. It is recommended to perform a preview by clicking the Synchronize preview button before synchronizing the website to verify that everything seems correct.

It is possible to abort a preview or synchronization by clicking on the corresponding cancel button ("X").

If you have trouble synchronizing the website, verify that you followed the installation and verification instructions and see the Troubleshooting section of this manual.

Web statistics

The web statistics will help you get informations on the visits of your website. You can view the visits, the most viewed products, most viewed properties and locations.

Since web search engines like Google also visit your website using what are called search bots you should use the Agents viewer by clicking on the Agents button and search for search engines bots by clicking on the Find bots button. Once some bots are found you can click on the Exclude button to exclude them from the web statistics. You can bring back an agent from the excluded list by viewing the excluded bots with the Excluded agents button. You can also view what the bots visited by selecting an agent in the agents list and clicking on the Get activity button.

Templates

Make sure to make a backup of your Database files and local web files if you intend to modify the web templates. This will allow you to revert back to the previous template in the case where you don't like the changes you made.

The templates section of the website section allows you to modify the website templates and create a distinctive look for your on-line store. To edit a template you can click on the edit button of the template and then modify the html code. If you have selected a html editor in the configuration section of the POS you can click on the edit button in the template editor to start the html editor with the template. Once you have modified the template you can save it, close the html editor and the changes will appear in the template editor.

The template ID can be any text that will help you know what the template is about. The only template ID that can't be modified is the ID "MenuItem". This ID is used to fill the properties for the menu.

The template filenames must not be modified as the website will not be able to find the correct files if they are modified and will not be able to show the website correctly.

Most templates contain keywords that are replaced by the POS when generating the template files or by the website itself. The keywords can be identified by the characters "[" and "]". For example the keyword "[Tax.Amount]" will be replaced with a tax amount.

Here is a list of all the template files with a short description:

TTemplateCartBundleFormModifyButton.txt

The form that lists the bundles of a product in the cart. The **[BundleLines]** keyword uses the template **TTemplateCartBundleLineQuantityEdit.txt** to list the product's bundles.

TTemplateCartBundleLineQuantityEdit.txt

This template let's the user modify the bundle quantity of a product in the cart. It is used by the template **TTemplateCartBundleFormModifyButton.txt**.

TTemplateCartConfirmationShippingFound.txt

When a shipping has been calculated for the cart this template shows the confirmation link to the user. This template is shown by **TTemplateCartPageReviewBeforeConfirm.txt**.

TTemplateCartConfirmationShippingNotFound.txt

When the shipping amount was not found for the cart this template shows the Request informations link to the user. This template is shown by **TTemplateCartPageReviewBeforeConfirm.txt**.

TTemplateCartNotesDelay.txt

This note is shown in the cart when a product in the cart has an order delay.

TTemplateCartNotesReleaseDate.txt

This note is shown in the cart when a product in the cart has an ulterior release date.

TTemplateCartPage.txt

This is the main cart page.

TTemplateCartPageCustomerInfosEdit.txt

This is the page that contains the form to get the user's informations.

TTemplateCartPageReviewBeforeConfirm.txt

This is the page that shows the cart with shipping informations to confirm the order or request the shipping amount when the cart has not found a shipping rate. This page shows either the template **TTemplateCartConfirmationShippingFound.txt** or **TTemplateCartConfirmationShippingNotFound.txt**.

TTemplateCartProductDiscountedPrice.txt

This template shows a discounted product in the cart.

TTemplateCartProductInfosDelay.txt

This template shows delay informations in a cart product.

TTemplateCartProductInfosReleaseDate.txt

This template shows release date informations in a cart product.

TTemplateCartProductRegularPrice.txt

This template shows a regular priced product in the cart.

TTemplateCartTaxLine.txt

This template shows a tax line.

TTemplateConfirmedOrderEmail.txt

This template contains the order and is sent to the buyer and to the order email.

TTemplateConfirmedOrderEmailBundleLine.txt

This template contains a bundle line.

TTemplateConfirmedOrderEmailProduct.txt

This template contains a product.

TTemplateConfirmedOrderPagePaymentLink.txt

This cart page contains the payment link.

TTemplateConfirmedOrderPageShippingNotFound.txt

This template is shown to the user when the shipping rate was not found.

TTemplateMemberLoginLoggedIn.txt

This template is shown when the user is logged-in.

TTemplateMemberLoginLogin.txt

This template contains the login form.

TTemplateMenuPropertyLink.txt

This template contains a property menu line with the link for the property.

ID: **MenuItem**, no filename

The template with this ID and no filename is the template used for each menu item containing the property links (**TTemplateMenuPropertyLink.txt**).

TTemplateProductBundleLine.txt

This template contains a product bundle line.

TTemplateProductPageDiscountedPrice.txt

This template is shown when the user views the details of a product at a discounted price.

TTemplateProductPageRegularPrice.txt

This template is shown when the user views the details of a product at the regular price.

TTemplateProductPropertyValues.txt

This template is used to list the property values of a product in the product.

TTemplateProductSmallDiscountedPrice.txt

This template is used to show the small product informations of a discounted product.

TTemplateProductSmallRegularPrice.txt

This template is used to show the small product informations of a regular priced product.

TTemplateProductStatusDiscontinued.txt

This template shows the discontinued status of a product.

TTemplateProductStatusInStock.txt

This template shows a product in stock status and provides a link to add the product to the cart.

TTemplateProductStatusOutOfStock.txt

This template shows the out of stock status of a product.

TTemplateProductStatusReleaseDate.txt

This template shows a product with a future release date status and provides a link to add the product to the cart.

TTemplateProductStatusSoldOnlyInStore.txt

This template shows the sold only in store status of a product.

TTemplateProductStatusSpecialOrder.txt

This template shows a product with the special order status and provides a link to add the product to the cart.

TTemplateProductThumbnail.txt

This template shows the template of a product with a link the product’s picture.

TTemplateProductThumbnailSection.txt

This template is the thumbnail section on the product’s details page.

TTemplateSearchResultsGeneral.txt

This template shows the currently viewed property options.

TTemplateSearchResultsLatestProducts.txt

This template shows the latest products property options.

TTemplateSearchResultsPagePropertyLinkResults.txt

This template shows the search and latest products results.

Troubleshooting

Error viewing the Website and synchronizing

If you get an error when viewing your web site or from the website synchronization preview involving the file GlobalFunctions.php it is probably because your web server (hosting service) does not support PHP 5 or needs to have a .htaccess reference to PHP 5. To add a reference you will probably need to put the following line in the .htaccess file of the web site where your files are located:

AddType x-mapp-php5 .php

If there is no .htaccess file you may need to create it.

Verify with your web hosting service for more informations on activating PHP 5 on your web server.

No modifications when synchronizing or previewing the synchronization

If you have updated the website in the POS and you know that files should be updated but no files show up in the synchronization preview it may be because the POS local password file does not match the website password. You can erase the password file from the Data directory on the server and the synchronization will reset the password and should work correctly afterwards. The password file to erase is:

Data/PHPFileAccessPwd.txt