O_{uniCenta} Administration Guide

Version 4.3

Jack Gerrard May 2017

This Administrator Guide deals with the setup and configuration of uniCenta oPOS after installation. It is a "How to" of key points for Products, Security and User Permissions to enable a quick customization to suit the users operation.

Foreward

The focus of this document is the Administration of uniCenta oPOS

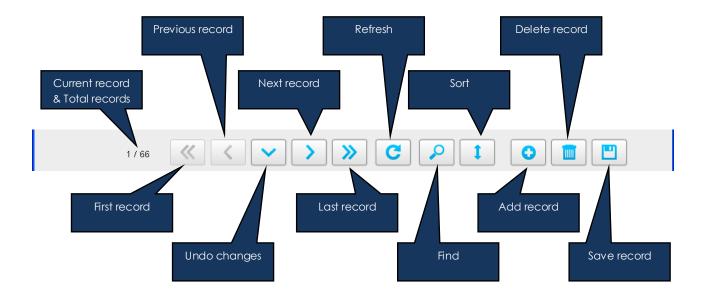
It follows a proven 10 Step process to get a uniCenta oPOS installation up and running quickly.

Date	Version	Author	Comment
March 2017	4.1	Jack Gerrard	Draft
May 2017	4.3	Jack Gerrard	Update
June 2017	4.3	Jack Gerrard	Final

Useful things

Editor Toolbar

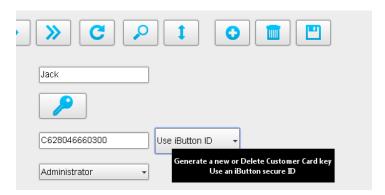
You will see this toolbar is used throughout uniCenta oPOS so here's a quick overview of what the buttons do. The Editor Toolbar appears in all record management forms.



Tooltips

Lots of things in uniCenta oPOS use pop-up Tooltips.

All you have to do is hover your mouse pointer over a component for a second and it will give you a brief description of what it does. Tooltips are constantly being added or revised as uniCenta oPOS development progresses.



ADMINISTRATION

Configuring uniCenta oPOS for the first time? Take things step-by-step and try not to feel too intimidated.

Follow the steps in this guide and you will be up and running quickly.

If an upgrade, you can use all your existing settings and only need to review, and possibly adjust, the new Configuration settings in uniCenta oPOS where necessary.

Either way, fresh install or upgrade, it's a good idea to be prepared before embarking on the set up.

If you're upgrading, it's recommended you read the upgrade page. https://unicenta.com/pages/upgrade-unicenta-opos/

There are a few things that need to be done if this is a new uniCenta oPOS installation.

Decide if this is a single or multi-terminal installation

Install Java JRE 1.8 (minimum).

Install MySQL server 5.5 (minimum) or use the MAMP installer for a local installation if you intend to use uniCenta Web reporting.

Support for installing and configuring a local MySQL server is partially covered in this guide and on our online Support section.

MySQL server installation on another machine hosted in the cloud or elsewhere is not covered in this guide. It is expected that it is installed, and supported by, a suitably qualified technician and functioning properly.

Settings in **Administration>Maintenance>Resources** are stored within the MySQL database and affect all connected machines such as: **Printer.Ticket**

Settings that are stored locally and affect only the local machine's installation are set using the : **Configuration** form.

Online uniCenta guide: https://unicenta.com/pages/install-unicenta-opos/

SETUP STEPS

The key to making sure you get the best out of uniCenta oPOS is follow these Set-up steps. Have some patience when you first start out and try to follow these simple steps...

- 1. INSTALL Java JRE
- 2. INSTALL MySQL
- 3. START UNICENTA OPOS
- 4. CONFIGURATION
- 5. PERMISSIONS ROLES & USERS
- 6. SET TAXES
- 7. CREATE CATEGORIES
- 8. CREATE PRODUCTS
- 9. SET RECEIPT LOGO
- 10. RESTART UNICENTA OPOS

Play with uniCenta oPOS first. Get to know it. Take your time. Don't rush. You will be up & running with uniCenta oPOS in not time compared to other systems.

You're ready to deploy in your store. Now take a Backup! Always better to do it now rather starting over again or trying to unravel mistakes later when trading.

1 - JAVA

You have to have the correct Java JRE Runtime installed for your Operating System.

If you're running Windows x64 use Java for x64, not the x86 version, and that it's running properly. If using Linux or Mac OS X you will need to install the Oracle JRE.

If have Open JDK installed you may run into problems running uniCenta oPOS. At this time it is not supported and for future it depends on Open JDK's compatibility with current and latest JRE.

Get Java: https://java.com

Online uniCenta guide:

https://youtu.be/mHVUmA29TdQ

2 - MYSQL

This version requires MySQL 5.5 or later installed and configured properly. A Schema must be created and Users Permissions also set correctly.

Get MySQL: https://www.mysql.com/downloads/

Online uniCenta guides:

3 – UNICENTA OPOS

Fire-up unicenta oPOS and head straight for the Configuration panel. Settings are here for everything from Databases through to Printers.

Get uniCenta oPOS: https://unicenta.com/download-files/installers/

Online uniCenta guides:

https://unicenta.com/download-files/installers/

https://unicenta.com/pages/install-unicenta-opos/

https://youtu.be/mOnMCEpfJ2w?list=PLCCYL2bRmxw1tngbebCFY8fg1uaZc8jVE

4 - CONFIGURATION

Fire-up unicenta oPOS and head straight for the Configuration panel. Settings are here for everything from Databases through to Printers.

Configuration settings are stored in a disk file: unicentaopos.properties

Windows XP: \Documents and Settings\username

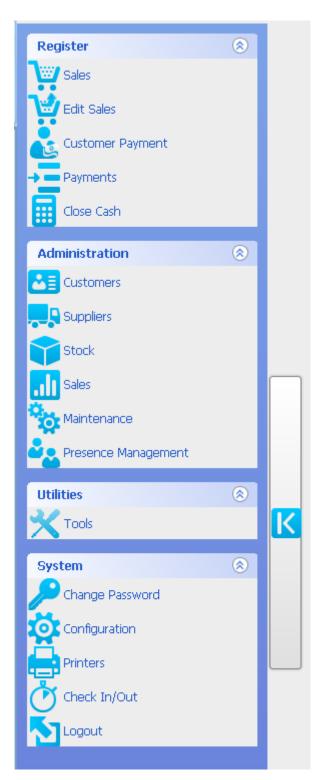
Windows 7-10: \Users
Linux: /home/username
Mac OS X: Users/username

Online uniCenta guides:

https://unicenta.com/pages/configure-unicenta-opos/ https://unicenta.com/packages/guide-configuration/

5 - PERMISSIONS

ROLES



Permissions control what is visible on the main uniCenta oPOS menu as well as certain other functionality.

By default the Administrator **Role** has access to all uniCenta oPOS features and functions.

Four default Roles are created at time of installation.

Here in descending order of importance and visible menu options :

- 1. Administrator
- 2. Manager
- 3. Employee
- 4. Guest

You can create an unlimited number of Roles and modify them to suit your operation.

Use the Administrator **Role** as the template for new roles.

Go to Administration>Maintenance>Roles

Below is the application's list of options you can grant access to a Role:

Comment out <! The function name -->

```
<!-- <class name="com.openbravo.pos.sales.JPanelTicketEdits"/> -->
```

ADMINISTRATOR ROLE PERMISSIONS

SALES PANEL

```
<class name="com.openbravo.pos.sales.JPanelTicketSales"/>
<class name="com.openbravo.pos.sales.JPanelTicketEdits"/>
<class name="com.openbravo.pos.customers.CustomersPayment"/>
<class name="com.openbravo.pos.panels.JPanelPayments"/>
<class name="com.openbravo.pos.panels.JPanelCloseMoney"/>
<class name="com.openbravo.pos.panels.JPanelCloseMoneyReprint"/>
<class name="sales.Override"/>
<class name="sales.ViewSharedTicket"/>
<class name="sales.DeleteLines"/>
<class name="sales.EditLines"/>
<class name="sales.EditTicket"/>
<class name="sales.RefundTicket"/>
<class name="sales.PrintTicket"/>
<class name="sales.Total"/>
<class name="sales.ChangeTaxOptions"/>
<class name="payment.bank"/>
<class name="payment.cash"/>
<class name="payment.cheque"/>
<class name="payment.voucher"/>
<class name="payment.magcard"/>
<class name="payment.slip"/>
<class name="payment.free"/>
<class name="payment.debt"/>
<class name="refund.cash"/>
<class name="refund.cheque"/>
<class name="refund.voucher"/>
<class name="refund.magcard"/>
<class name="sales.PrintKitchen"/>
<class name="sales.ShowList"/>
```

STANDARD BUTTONS

```
<class name="button.totaldiscount"/>
<class name="button.print"/>
<class name="button.opendrawer"/>
<class name="button.posapps"/>
```

ADDITIONAL BUTTONS

```
<class name="button.linediscount"/>
<class name="button.sendorder"/>
<class name="button.refundit"/>
<class name="button.scharge"/>
```

CUSTOMER PANEL

SUPPLIER PANEL

STOCK MANAGEMENT PANEL

```
<class name="com.openbravo.pos.forms.MenuStockManagement"/>
       <class name="com.openbravo.pos.inventory.AttributesPanel"/>
       <class name="com.openbravo.pos.inventory.AttributeValuesPanel"/>
       <class name="com.openbravo.pos.inventory.AttributeSetsPanel"/>
       <class name="com.openbravo.pos.inventory.AttributeUsePanel"/>
       <class name="com.openbravo.pos.inventory.AuxiliarPanel"/>
       <class name="com.openbravo.pos.inventory.BundlePanel"/>
       <class name="com.openbravo.pos.inventory.CategoriesPanel"/>
       <class name="com.openbravo.pos.inventory.ProductsPanel"/>
       <class name="com.openbravo.pos.inventory.ProductsWarehousePanel"/>
       <class name="com.openbravo.pos.inventory.StockDiaryPanel"/>
       <class name="com.openbravo.pos.inventory.StockManagement"/>
       <class name="com.openbravo.pos.inventory.TaxCategoriesPanel"/>
       <class name="com.openbravo.pos.inventory.TaxCustCategoriesPanel"/>
       <class name="com.openbravo.pos.inventory.TaxPanel"/>
       <class name="com.openbravo.pos.inventory.UomPanel"/>
       <class name="/com/openbravo/reports/barcode sheet.bs"/>
       <class name="/com/openbravo/reports/barcode shelfedgelabels.bs"/>
       <class name="/com/openbravo/reports/inventory.bs"/>
       <class name="/com/openbravo/reports/inventoryb.bs"/>
       <class name="/com/openbravo/reports/inventory diary.bs"/>
       <class name="/com/openbravo/reports/inventorybroken.bs"/>
       <class name="/com/openbravo/reports/inventorydiff.bs"/>
       <class name="/com/openbravo/reports/inventorydiffdetail.bs"/>
       <class name="/com/openbravo/reports/inventorylistdetail.bs"/>
       <class name="/com/openbravo/reports/productscatalog.bs"/>
       <class name="/com/openbravo/reports/products.bs"/>
       <class name="/com/openbravo/reports/productlabels.bs"/>
       <class name="/com/openbravo/reports/salecatalog.bs"/>
```

SALES MANAGEMENT PANEL

```
<class name="com.openbravo.pos.forms.MenuSalesManagement"/>
       <class name="/com/openbravo/reports/sales cashflow.bs"/>
       <class name="/com/openbravo/reports/sales cashregisterlog.bs"/>
       <class name="/com/openbravo/reports/sales categorysales.bs"/>
       <class name="/com/openbravo/reports/sales categorysales 1.bs"/>
       <class name="/com/openbravo/reports/sales closedpos.bs"/>
       <class name="/com/openbravo/reports/sales closedpos 1.bs"/>
       <class name="/com/openbravo/reports/sales_closedproducts.bs"/>
       <class name="/com/openbravo/reports/sales closedproducts 1.bs"/>
       <class name="/com/openbravo/reports/sales extendedcashregisterlog.bs"/>
       <class name="/com/openbravo/reports/sales extproducts.bs"/>
       <class name="/com/openbravo/reports/sales paymentreport.bs"/>
       <class name="/com/openbravo/reports/sales productsalesprofit.bs"/>
       <class name="/com/openbravo/reports/sales saletaxes.bs"/>
       <class name="/com/openbravo/reports/sales taxcatsales.bs"/>
       <class name="/com/openbravo/reports/sales taxes.bs"/>
       <class name="/com/openbravo/reports/sales chart chartsales.bs"/>
       <class name="/com/openbravo/reports/sales chart piesalescat.bs"/>
       <class name="/com/openbravo/reports/sales chart productsales.bs"/>
       <class name="/com/openbravo/reports/sales chart timeseriesproduct.bs"/>
       <class name="/com/openbravo/reports/sales chart top10sales.bs"/>
```

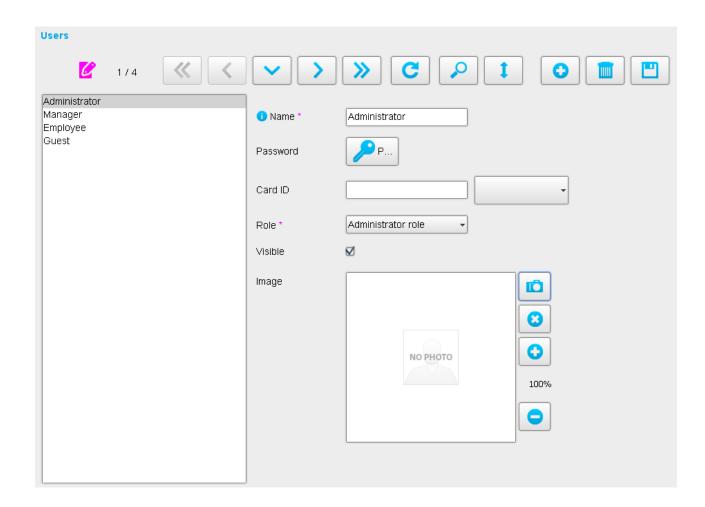
MAINTENANCE PANEL

```
<class name="com.openbravo.pos.forms.MenuMaintenance"/>
       <class name="com.openbravo.pos.admin.PeoplePanel"/>
       <class name="com.openbravo.pos.admin.RolesPanel"/>
       <class name="com.openbravo.pos.admin.ResourcesPanel"/>
       <class name="com.openbravo.pos.inventory.LocationsPanel"/>
       <class name="com.openbravo.pos.mant.JPanelFloors"/>
       <class name="com.openbravo.pos.mant.JPanelPlaces"/>
       <class name="com.openbravo.pos.voucher.VoucherPanel"/>
       <class name="/com/openbravo/reports/people.bs"/>
       <class name="/com/openbravo/reports/usersales.bs"/>
       <class name="/com/openbravo/reports/usernosales.bs"/>
       <class name="/com/openbravo/reports/uservoids.bs"/>
<class name="com.openbravo.pos.imports.JPanelCSV"/>
       <class name="com.openbravo.pos.imports.JPanelCSVImport"/>
       <class name="com.openbravo.pos.imports.StockQtyImport"/>
       <class name="com.openbravo.pos.imports.CustomerCSVImport"/>
       <class name="com.openbravo.pos.imports.JPanelCSVCleardb"/>
       <class name="com.unicenta.pos.transfer.Transfer"/>
       <class name="/com/openbravo/reports/badprice.bs"/>
       <class name="/com/openbravo/reports/invalidcategory.bs"/>
       <class name="/com/openbravo/reports/invaliddata.bs"/>
       <class name="/com/openbravo/reports/missingdata.bs"/>
       <class name="/com/openbravo/reports/newproducts.bs"/>
       <class name="/com/openbravo/reports/updatedprices.bs"/>
       <class name="/com/openbravo/reports/inventoryqtyupdate.bs"/>
```

EMPLOYEE MAINTENANCE PANEL

ADDITIONAL OPTIONS

USERS



Go to Administration>Maintenance>Users

Four default Users are created at time of installation.

- 1. Administrator
- 2. Manager
- 3. Employee
- 4. Guest

You can create an unlimited number of Users.

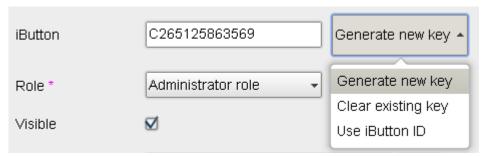
To create a new User: Click button New

Name The name this User will be known by

Password Enter a password and press OK. You will be asked to re-enter to confirm.



Card ID An auto-generated Id. If you are using iButton option - assign a specific button to a User.



Role Assign a Role

Visible Keep checked to display this User on the Main form. Uncheck to Hide

Image An image of your choice

6 - TAXES

uniCenta oPOS has three Rate types already created: Exempt, Standard and Other.

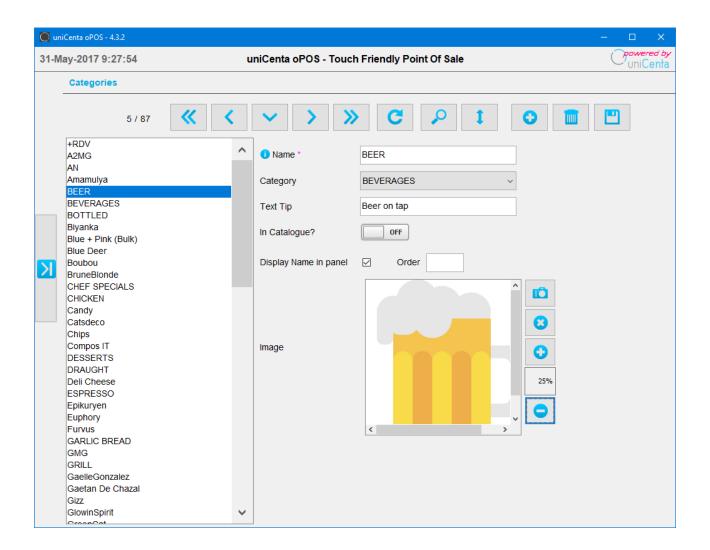
Go to **Stock** under **Administration** and Select **Taxes**.

Set up **Tax** bands that can be associated with **Products**. This allows taxation calculations to be performed automatically.

Online uniCenta guide:

https://unicenta.com/packages/guide-taxes-management/

7 - CATEGORIES



Go to Administration>Stock>Categories

Use a Category to conveniently group a set of Products.

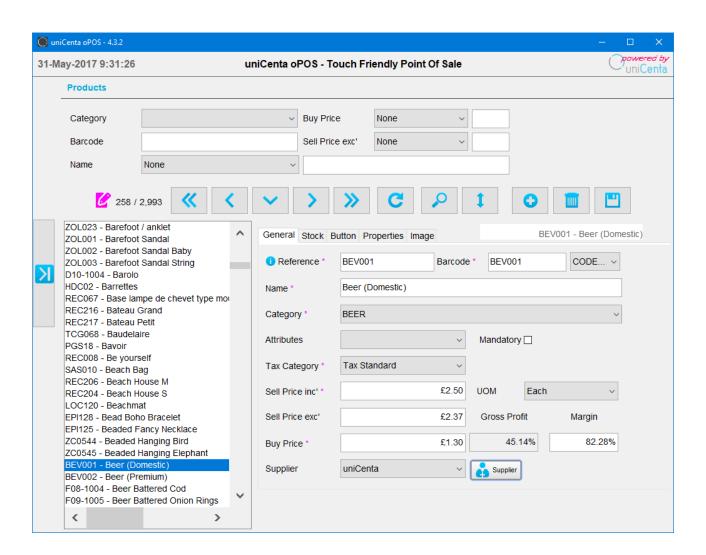
A default Category is created at the time of install – Category Standard. You can rename it and go on to create as many as you need.

Managing your Product catalogue starts with setting up **Categories** and then adding **Products** to the **Categories** you create here.

Online uniCenta guide:

https://unicenta.com/packages/guide-categories/

8 - PRODUCTS



Go to Administration>Stock>Products

Probably the most important part in uniCenta oPOS you need to get right.

Assign everything here from Barcodes through to Sales screen button images and fancy looking text.

Two default wildcard Products are created at the time of install which you can rename, but recommend you do not delete.

- ** Service Charge see Configuration Guide
- *** Variable price Products

Online uniCenta guide :

https://unicenta.com/packages/guide-products/

9 - RECEIPTS



uniCenta oPOS
Touch Friendly Point Of Sale
Copyright (c) 2009-2017 uniCenta
Change header text in Configuration
Printer.Ticket

Receipt: 12845

Date: 31-May-2017 09:43:16

Terminal: HUGO-DESKTOP Served by: Administrator

Item	Price	Qty	Value	
Product Bundle	£20.00	x1	£20.00	
Carnet RDV	£340.00	x1	£340.00	
LARGE, WHITE				
Chocolate Fudge C	£2.83	x1	£2.83	
ABSOLUTE 1541 Bro	1,800.00	x1	£1,800.00	
Ttoma asymty /				

Items count: 4

Total £2,162.83

Nett of Tax: £2.161.64

Advanced configuration of uniCenta oPOS is done via the **Resources** panel rather than with a GUI.

To change the default ticket you must go to the **Resources** panel and edit the resource with the name **Printer.Ticket**.

uniCenta oPOS uses a language based on XML called Apache Velocity - reference to Velocity - to print receipts and output to a Customer Display which is independent of the model of printer and customer display used.

All of the variables available are used in the Printer. Ticket template

A default ticket template such as **Printer.Ticket** (a Receipt) can serve as a good reference point for other ticket variations you may want to create.

\$ticket and **\$ticketlines** class variables are preset and you should refer to the uniCenta oPOS Developer documentation if you wish to change or add additional variables.

Go to Administration>Resources>Printer.Ticket

See the **Appendix** in this guide for a list of Ticket Templates

Online uniCenta guide:

https://unicenta.com/packages/uniCenta oPOS Developer Scripting Guide

Ticket

The **ticket** tag prints everything to a printer that is contained within **begin** < ticket > tag and the **end** </ticket > tag.

When the </ticket> tag is encountered; print output is stopped and the printer is sent a command to perform a form-feed and partially cut the paper.

The begin <printer> tag can also contain which printer the output should be directed to.

Example:

```
<ticket printer=2> ... </ticket> - printer 2 will print the receipt
```

The following elements can be used in any position in a ticket template

You can force any element tag to be ignored during processing by using the special <!-- ... --> tags at the beginning and end of a line or block of lines:

Example:

```
<!-- <li>eline size=3> ... </line> -->
OR
<!-- <li>eline size=3> ... </line>
<text align ="right" length="10" underline="true">Some text</text> -->
```

Line

The line tag sets the text size and height properties of a printed line in a receipt.

Values you can use are:

- 0 Normal size (default)
- 1 Double height
- 2 Double weight
- 3 Double height and weight

Example:

```
<line size=3> ... </line>
```

Text

The **text** tag sets the actual text to be printed on a **line** in a receipt.

Values you can use are:

```
align - defines the Alignment of the text string:

left - align text to the left (Default value)

right - align text to the right

center - sets the text in the centre.

length - defines the length in characters used to fit the text strings.

bold - defines whether if the text is bold or not. By default false.

underline - defines whether if the text is underlined or not. By default false
```

Example:

```
<text align ="right" length="10" underline="true">Some text</text>
```

Image

The **image** tag will include your chosen image in the ticket.

Define the image to be used in the Resources panel using the **Image** type.

The **Image** is converted to black and white before sending it to the printer.

The default logo Image can be changed for your own by editing the resource Printer.Ticket.Logo

The image types supported vary by printer. Most thermal printers support image printing and most dot-matrix don't. The image must be 256 pixels wide at most.

Example:

```
<image>Printer.Ticket.Logo </image>
```

Barcode

Insert a barcode image in the receipt.

EAN13 and CODE128 formats are used.

Example:

```
<barcode type="EAN13">0201820070796</barcode> -- a fixed string
OR
<barcode type="CODE128">${ticket.getPickupId()}</barcode> -- Order #
```

Opendrawer

Opens the Cash-drawer attached to the receipt printer.

It is a special command and does not have a begin tag or end tag.

It can be inserted in any position within the <ticket>...</ticket> tags.

```
<opendrawer/>
```

Display

The **display** tag sends everything to a Customer Display which is contained within **begin** <display> tag and the **end** </display> tag.

Only 2 line x 20 characters matrix Customer Displays are supported.

When uniCenta oPOS starts it reads the **Printer.Start** resource to initialize the Customer Display.

Go to Administration>Resources>Printer.Start

Depending on the capabilities of your Customer Display you can try the following settings:

Customer Display Animation Options

You can use the same e>text>...e>text></line> tags to send text to the Customer Display.

```
align - defines the alignment of the text string

left - align text to the left (Default value)

right - align text to the right

center - sets the text in the centre

length - defines the length in characters used to fit the text strings
```

Line

Example:

```
<display animation="flyer">
<line><text align="center" length="20">Welcome to </text></line>
<line><text align="center" length="20">My Store!</text></line>
</display>
```

10 - RESTART

Adding or changing Taxes, Categories, Products and Resources are immediately visible and available to use.

The only exception to this is if you have made a change to the **Printer.Start** Resource as this initializes the Customer Display when uniCenta oPOS starts.

If you have made any setting changes in the **Configuration** form you need to restart uniCenta oPOS for them to take effect.

APPENDIX

List of printed standard tickets which use Velocity XML

TICKET TEMPLATE	USAGE
Printer.CloseCash	CloseCash – Z Reading
Printer.CloseCash.Preview	CloseCash – Z Reading Preview dos not run actual CloseCash function
Printer.CustomerPaid	Customer Payment
Printer.CustomerPaid2	Customer Payment – Alternative
Printer.FiscalTicket	Alternative / Additional CloseCash for Fiscal output where required by law
Printer.Inventory	Stock Management – Audit ticket
Printer.PartialCash	Partial Cash – X Reading
Printer.PrintLastTicket	Recall of the LAST printed receipt
Printer.Product	Legacy
Printer.ReprintTicket	Edit Sale – Recall and print of a specific receipt
Printer.Start	Output to Customer Display – called from various ticket templates
Printer.Ticket	Sale - Printed receipt for Sale or Refund transaction
Printer.Ticket.P1	Remote Printer 1 – as assigned in Product – called from script.SendOrder
Printer.Ticket.P2	Remote Printer 2 – as assigned in Product – called from script.SendOrder
Printer.Ticket.P3	Remote Printer 3 – as assigned in Product – called from script.SendOrder
Printer.Ticket.P4	Remote Printer 4 – as assigned in Product – called from script.SendOrder
Printer.Ticket.P5	Remote Printer 5 – as assigned in Product – called from script.SendOrder
Printer.Ticket.P6	Remote Printer 6 – as assigned in Product – called from script.SendOrder
Printer.Ticket2	Customer Display – alternative
Printer.TicketClose	Sale - Invoked after transaction settlement
Printer.TicketLine	Sale - Customer Display output alternative
Printer.TicketNew	Sale - Customer Display output alternative
Printer.TicketPreview	Sale - Pre-Sale settlement
Printer.TicketRemote	Sale - Remote Printer – legacy for users of Kitchen print script
Ticket.Line	Sales Screen - Displays current transaction's ticket lines