

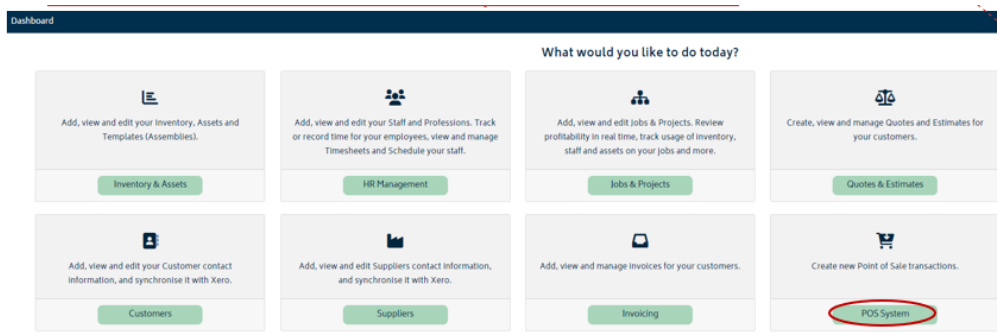
## Knowledge Base



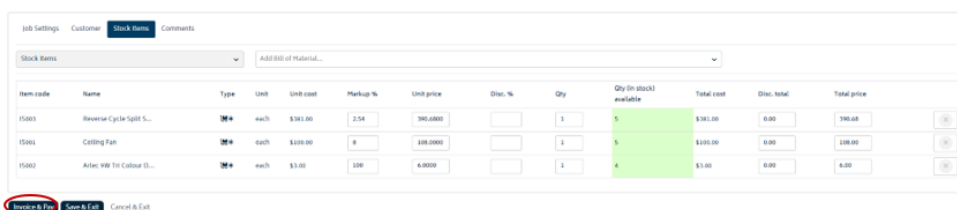
### Create a POS Job

The POS module in Gojee allows you to sell your inventory items over the counter, and either take payment for these items on the spot, or allocate invoices to customers' accounts.

To get started, navigate to POS System from the Home Screen:



You will be directed to the Bill of Materials page for creating a job. Add the items for the sale, and update the quantity of each line item:



Item code	Name	Type	Unit	Unit cost	Markup %	Unit price	Disc. %	Qty	Qty (in stock) available	Total cost	Disc. total	Total price
I5003	Reversal Cycle Split S...	✚	each	\$381.00	2.54	390.0000		1	5	\$381.00	0.00	390.00
I5001	Ceiling Fan	✚	each	\$100.00	8	108.0000		1	5	\$100.00	0.00	108.00
I5002	Arlec HR Tri Colour D...	✚	each	\$3.00	100	6.0000		1	4	\$3.00	0.00	6.00

**Add Bill of Materials** | **Save & Exit** | **Cancel & Exit**

Note: If you don't have sufficient stock on hand for any tracked item, you will not be able to process the sale.

- If you'd like to assign a customer for the sale, click on the Customer tab and choose the customer from the dropdown list, or create a new customer on the fly (refer to [Create a Job](#) for more information on creating new customers from the job page).
- Once you're happy with the sale, click "Invoice and Pay". This will create an approved invoice in your Xero file. You will be directed to the view invoice screen once the invoices has been generated:

You have the following options from this screen to complete the sale:

## Take Payment for POS Jobs

### Take Cash Payment:

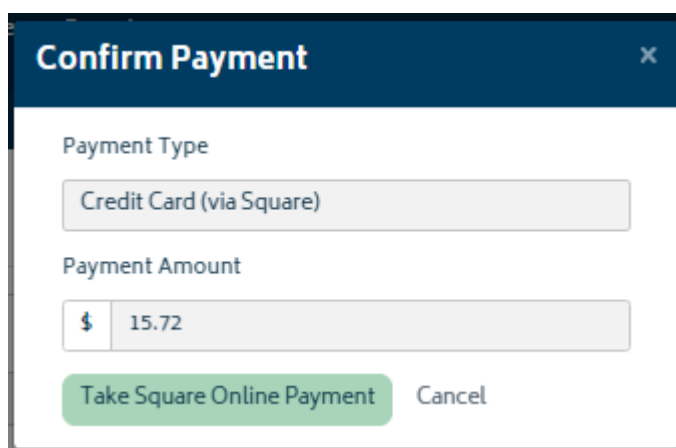
- If you'd like to take a payment on the spot, enter the cash payment amount and click "Take Cash Payment"

- The system will ask you to confirm the payment. Click "Take Payment" and you will be able to see the payment made under "Payment History" as below:

Payment History				Refresh
Date ^	Source	Amount Paid	Status	
20 Jul 2023, 18:53	Cash	\$155.15	Verified	Refund

## Take Card Payment:

- This requires Square integration to be set up. Refer to the [Add-ons](#) section for more information on how to set it up.
- If you are using Gojee from a mobile device, tablet or iPad, and you have the Square app installed, you'll be able to take a physical card payment. You'll be directed to the Square app to take the card payment and then back to the Gojee app once complete.
- If you are using Gojee on a desktop device, once you select take card payment you will be presented with the following modal.



### Confirm Payment

Payment Type

Credit Card (via Square)



Payment Amount

\$ 15.72

Take Square Online Payment Cancel

- Taking the online payment will direct you to the following secure web based payment screen powered by Square:

## Checkout

 \*\*\*\* 1031

OR

### Shipping Information

First Name	Ama		
Last Name	Zona		
Email	test@me.com		
Country	Australia ▼		
Street Address	234 Vulture Street	1355	
Suburb	South Brisbane		
State	Queensland ▼		
Postal Code	4101		

### Order Details

1 x Gojee Payment \$15.72

Gojee Invoice Payment - J01547 - 1 -  
INVPOS, Xero Invoice Number - INV-0821


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Total \$15.72

Place Order

By continuing, you agree to the [Square Privacy Policy](#).

### Payment Information

Name on Card	Jane Doe		
 Card number	MM/YY	CVV	

  
Powered by Square  
[Privacy Policy](#)


- You can enter the card details to process the online payment.

**Note:** All POS jobs will be marked as completed automatically after a payment has been made.

### Other Payment Methods:

If you wish to take payment for your POS transaction via bank transfer or cheque, you can do this from within Xero.

- Follow the POS process and generate an invoice, but don't process payment immediately. When you do receive payment, go back to the recorded POS job and click the Open Xero button at the top right of the invoice:

Feedback 

[Open in Xero](#) 

Reference

3 - Job: J00004

Xero Invoice No.

ORC1050

- From here, you will be able to enter information regarding the account the funds have been deposited in:

The screenshot shows a software interface for managing invoices. At the top, there's a breadcrumb 'Sales overview > Invoices' and a header bar with 'Invoice' and a status 'Awaiting payment'. A 'Preview' button and an 'Add payment' button are also visible. The main content area shows an invoice for 'Bayside Club' with a 'Sent' checkbox. A modal window titled 'Add payment' is open, containing the following fields: 'Date paid' (a date picker set to 'Tue, 16 Apr 2024'), 'Account' (a dropdown menu with 'Select account'), 'Amount paid' (a text input with '153.20'), and 'Reference' (an empty text input). At the bottom of the modal are 'Cancel' and 'Add' buttons. The background shows parts of the invoice details, including a 'To' address and a 'Reference' field.

Once Xero syncs with Gojee and the invoice's payment is accounted for, the POS transaction will be marked as completed.

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## Cancel POS Job

Select the red Cancel POS Job button from the POS Invoice screen. This will cancel the POS job, void the invoice and any stock consumed onto the job.

Reports > Invoices > View Invoice
Feedback

Open In Xero

Invoice - Amazon - 1 - INVPOS

Customer

Due Date

Reference

Xero Invoice No.

Amazon

18/09/2023

1 - INVPOS

INV-0821

Name	Quantity	Unit Price	Discount %	Tax Amount	Amount (ex. GST)
1/2" pipe nipple with temperature probe (male-male)	1	\$14.29		\$1.43	\$14.29

Pay Amount

\$ 15.72

Take Cash Payment
Take Card Payment
Cancel POS Job

Once a POS job is fully paid, it will automatically be marked as completed.

Total (ex. GST):

\$14.29

Tax:

\$1.43

Amount Paid:

\$0.00

Amount Due:

\$15.72

Payment History

Refresh

Date ^	Source	Amount Paid	Status
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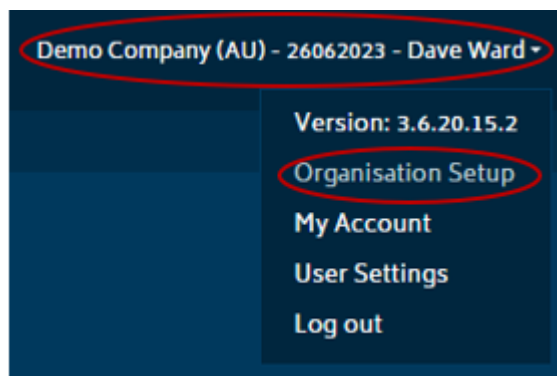
Edit
Back to Job Invoices
Back to All Invoices

## Set a Default POS Customer

You can set up a default customer for POS jobs to save time when creating sales. You could create a new customer in your Gojee file called "Cash Sale" or similar for example, and then assign this as the default for all POS sales.

Note: you can still change the customer for each POS job if required.

To get started, click on your organizations name on the top right in Gojee and select "Organization Setup".



Select "Payment" and select the customer you created for POS jobs.

Edit organisation Demo Company (AU) - 26062023

GL Account Mapping
Xero Branding Theme Mapping
Planning
Email Settings
Application Features
Job Task Activities
Payments
Resource Settings
Other Settings

Select POS Customer

Dave Ward
132 Collins
7-Eleven
ABPA
Alan Williams
ASGARD
ATO
Bank

Save

Click Save and all new POS jobs created from this point will have the default customer assigned.

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Next: [Back to Knowledge Base](#).