



KUARIO

KUARIO Back Office Manager
User Manual - EN
R 24



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Uitgever

KUARIO B.V.

Productie

KUARIO B.V.

Inhoudsopgave

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Introduction

➔ Introduction

Welcome to the KUARIO Manager!

KUARIO Manager manages the Sites, Products, Templates, Outlets, Users, Order Terminals and Payment Terminals. You can manage the Site (and everything belonging to that Site) if you are the manager of that Site and all the Sites below.

You can access the KUARIO Manager online at the KUARIO Manager page (<https://manager.kuario.com/>), provided you have a manager account.

Enjoy our product!,

The KUARIO-team

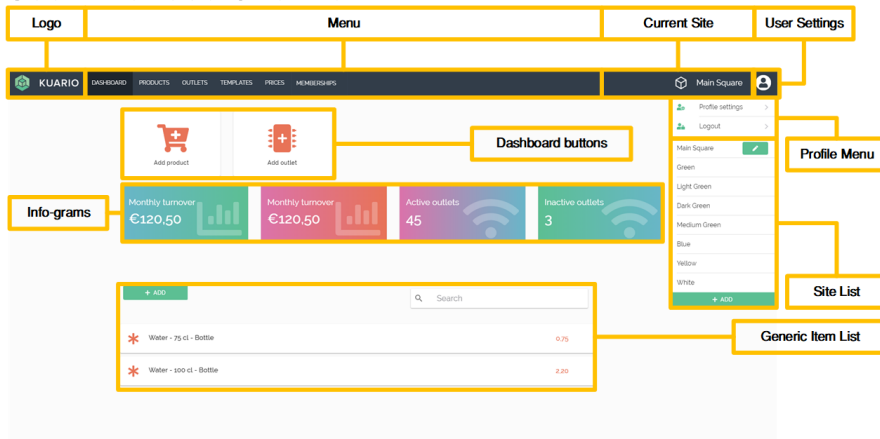
User Interface

User Interface

The User Interface is an intuitive interface suitable for desktop and mobile use. It has a number of components. These will be treated here.

Component	Description
Menu bar	The menu bar is at the top-middle. Here all the KUARIO Back Office functions can be found. Click anywhere on the menu item to go to that module.
Current Site	The current Site. All Site-related actions will refer to this Site.
User Settings	The settings of the user account that is logged in. The Profile Menu is located here. You can also log out here.
Generic List	Each module has approximately the same list of items, sometimes with more detail like prices. The button in the upper-left corner is the 'Quick Action Button'. Usually this will be the 'Add' button.
Dashboard buttons	The dashboard button are direct short-cuts to our most-used functions. Click them to go directly to the module they depict.
Info-grams	The dashboard has info-grams, a concise block of information that can instantly be understood.
Site List	The site list is a list of all the sites that are available to you.
Logo	In the upper-left corner you will find the KUARIO logo.

User interface Overview



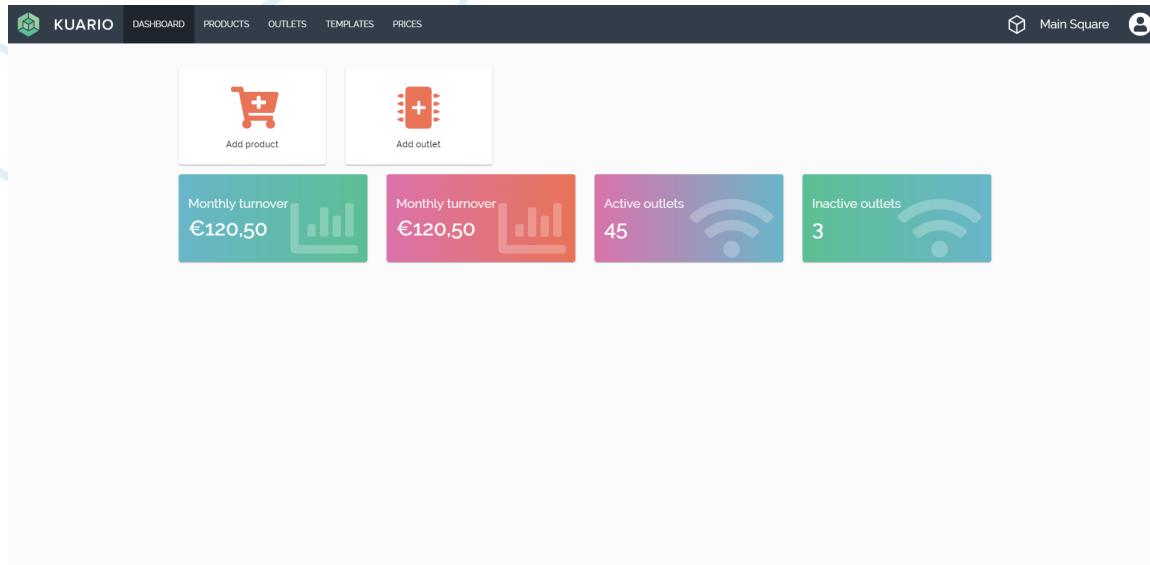
Menu bar

On the top of the site you will find the menu bar that will lead you to the on of the modules on the site:

Dashboard

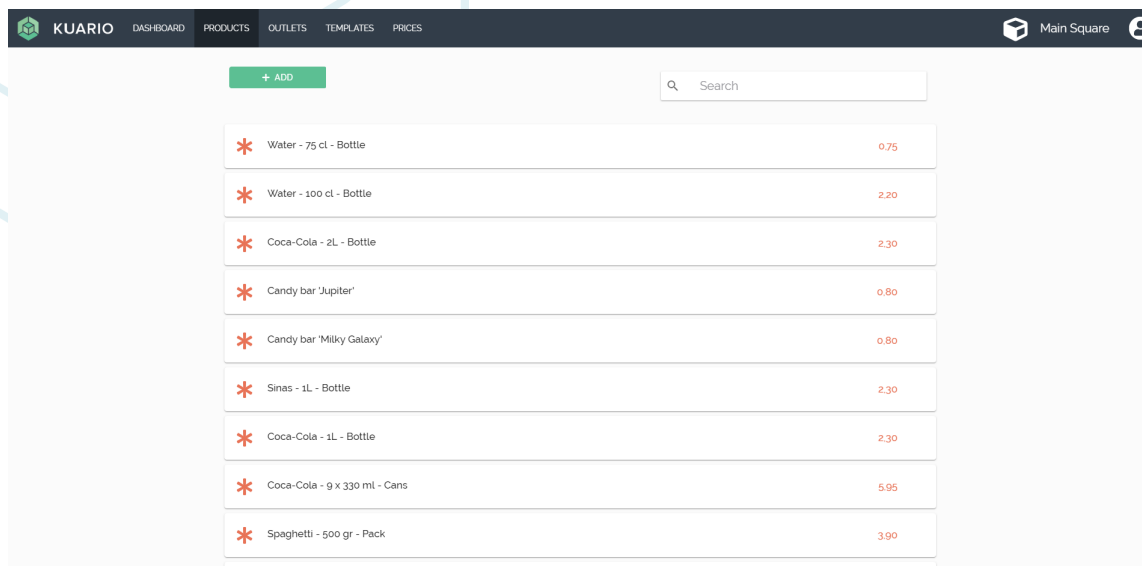
The dashboard shows a few 'Dashboard buttons' that will navigate you to other parts on the site.

Below that you can see some info-grams that could give you a summary of a report or other collected data of your site.



Products

In the Products module you can see the list of all the products and also may add a Product. Products are either physical items or services sold at the Outlets. A product can have a fixed price or an open price. It can also have a certain VAT attached to it. For bar code scanners a 'Product identifier' should be added, this should be the code that the bar code should resolve to. The price of an item is the recommended price, the actual price is determined by the price line.

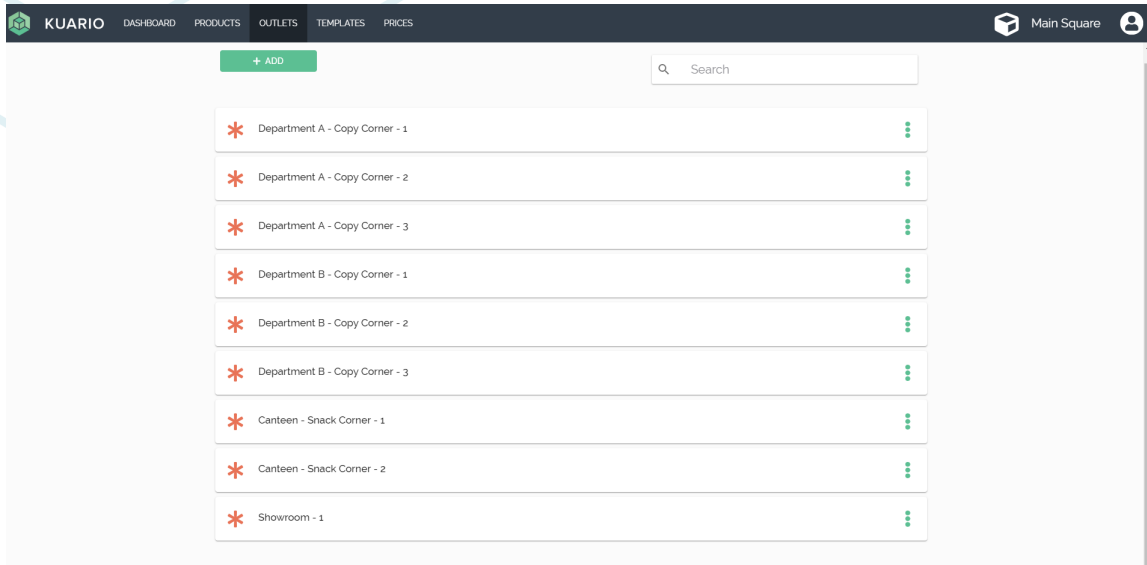


Product Name	Price
* Water - 75 cl - Bottle	0,75
* Water - 100 cl - Bottle	2,20
* Coca-Cola - 2L - Bottle	2,30
* Candy bar 'Jupiter'	0,80
* Candy bar 'Milky Galaxy'	0,80
* Sinas - 1L - Bottle	2,30
* Coca-Cola - 1L - Bottle	2,30
* Coca-Cola - 9 x 330 ml - Cans	5,95
* Spaghetti - 500 gr - Pack	3,90

Outlets

In the Outlets module you can see the Outlets. An Outlets is an abstract single spot from where you can sell or just distribute products or services. Outlets can have two types of Terminals, an Order Terminal or an Payment Terminal. Each Outlet can only hold at maximum one type of terminal (for example: an order terminal and a payment terminal | an order terminal | no terminals). So a Site with two MFP's, three vending machine's and a Pay Point holds (at least) 6 Outlets, no matter how physically close these are to each other.

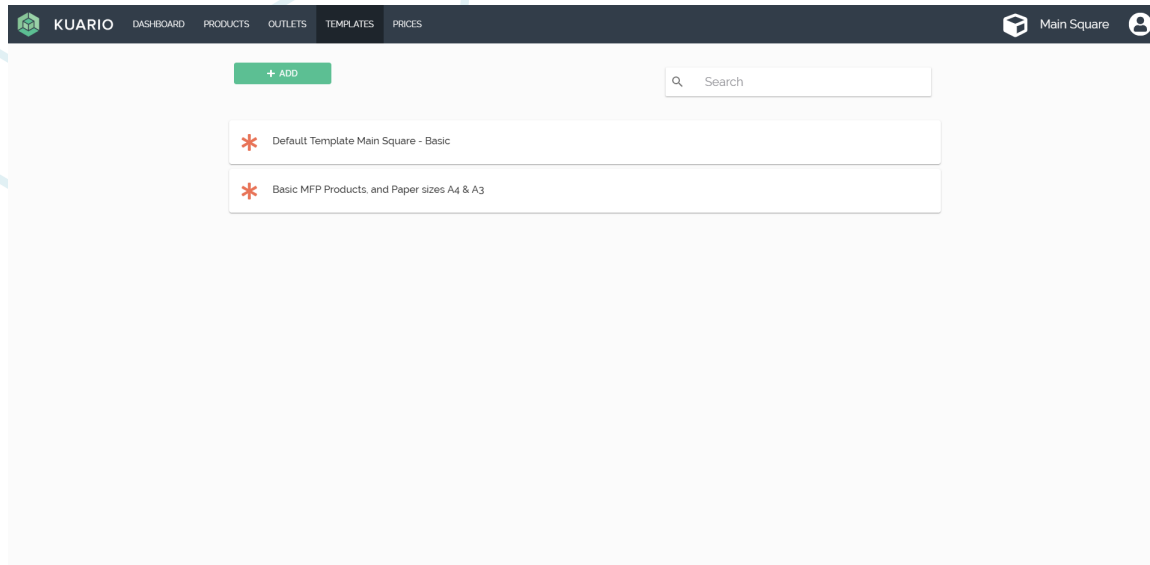
An end-user would use an Outlet to buy a product, load credit to his or her account, pay a previously placed order or just register the consummation of a product or service.



Templates

Templates determine which products are sold. Templates have different Template Types, the default type is 'Basic', other types are 'Cash Register', 'MFP', 'Vending Machine', 'Pay Point'. Each template other than 'Basic', has input features specific to its type. A 'Cash Register' template for example has 'Tabsheets"; a tab sheet is a sheet with product buttons as they would be displayed on the cash register as one of the product pages.

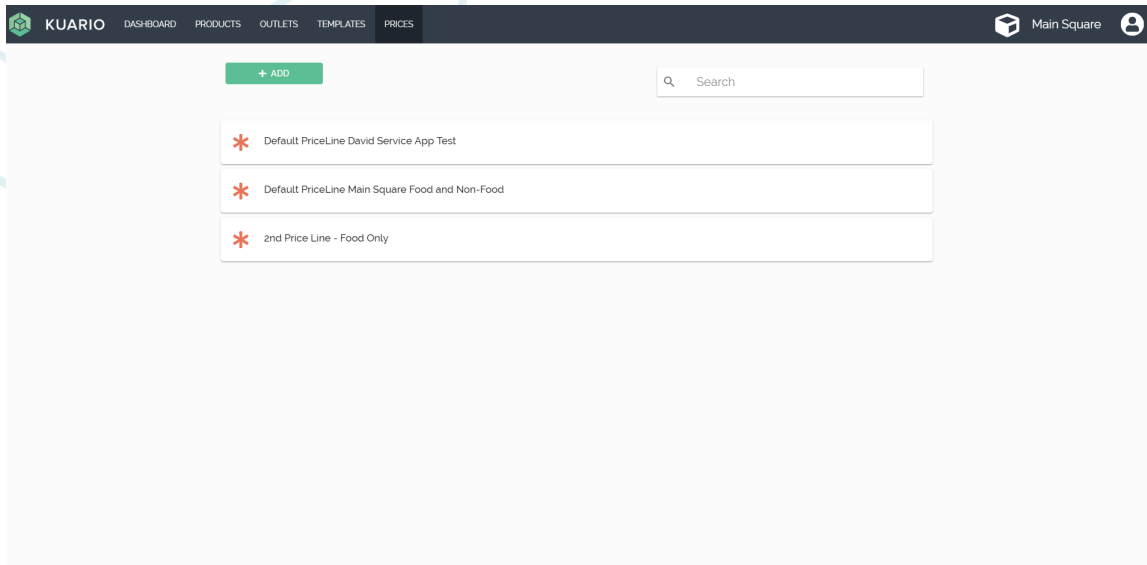
Using Templates you can restrict the number of sold items.



Prices

In 'Prices' you can add a new price line. All products have already a default or recommended price, the price they got when they were created. A product can also be created on a higher site level that you may have no access to. In cases where you deliver the same product but want to sell it for a different price, you can add a price line; a set of products with a different price and refer to that price in other parts of the KUARIO payment system.

A default price line will be created automatically for the Site containing all inherited items with their recommended prices.

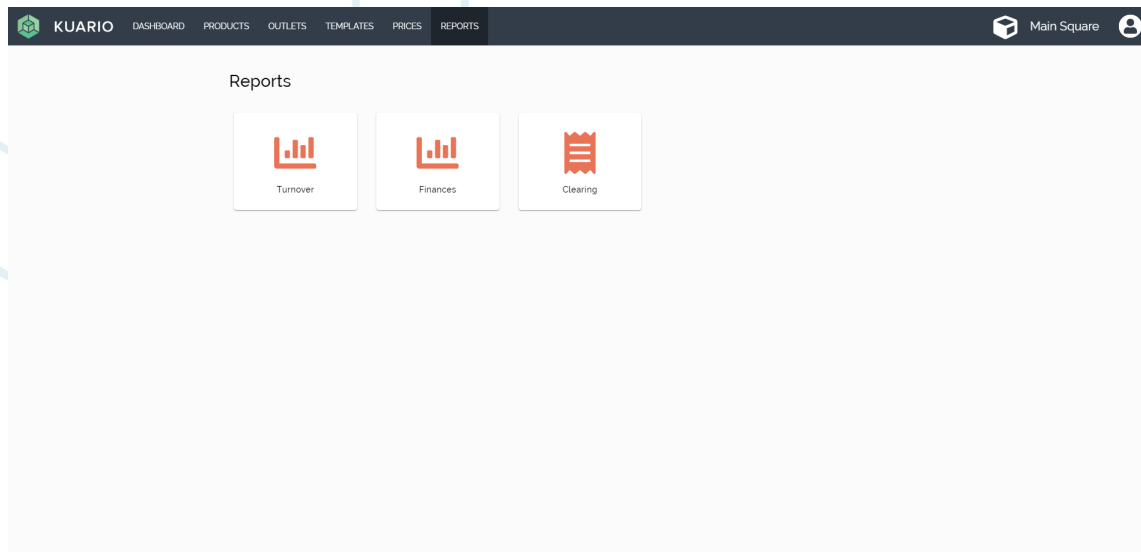


The screenshot shows the 'PRICES' section of the KUARIO dashboard. The navigation bar includes 'KUARIO', 'DASHBOARD', 'PRODUCTS', 'OUTLETS', 'TEMPLATES', and 'PRICES'. The user is logged in as 'Main Square'. The main content area features a '+ ADD' button, a search bar, and a list of three price lines, each marked with a red asterisk:

- * Default PriceLine David Service App Test
- * Default PriceLine Main Square Food and Non-Food
- * 2nd Price Line - Food Only

Reports

Reports are documents that presents information in an organized format for a specific audience and purpose. The reports currently available in KUARIO are 'Turnover', 'Finances' and 'Clearing' that show the outcome of the activities on a Site.

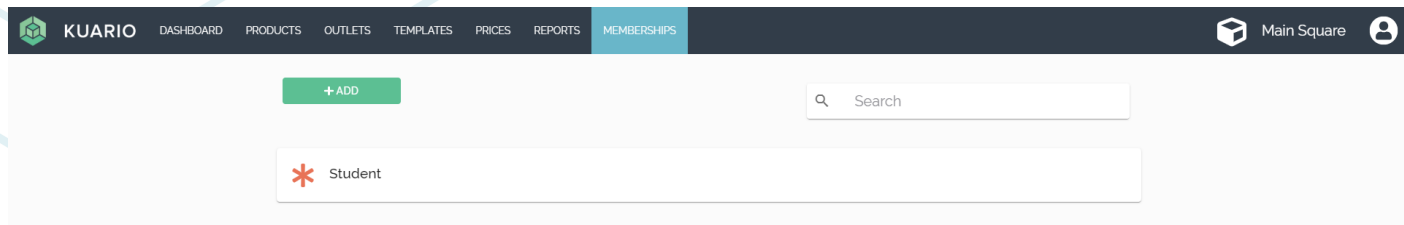


Memberships

Memberships are groups that a user can be a member of and that may give that user extra rights or options.

Memberships can be used to grant exclusive access to an Outlet, provide a deduction of the product price or make it possible for the members to use KUARIO as payment source, or lastly to use invoices in stead of direct payments.

i Note: To let KUARIO to be used as an external payment source for a third-party application you will need KUARIO Gateway.



Users

Users

Users do not need to be created, they can create themselves. Before you can be a manager you must be registered as a user. A user-to-be needs to use the KUARIO app or go to the KUARIO app page (<https://login.kuario.com/index.html>) and click register. After the information has been provided a confirmation email will be sent to the registered address. In this manual we only treat the way to register on the site, but the method on the app is quite similar.

i Note: To download the KUARIO app go to: <https://kuario.com/>

Prerequisites:

- None

Where

- KUARIO app page (<https://login.kuario.com/index.html>).

Create User

1. Go to the KUARIO app page (<https://login.kuario.com/index.html>).
2. Click 'Register New Account'.



3. Fill in the information.



4. Click 'Register New Account'.

5. You will receive an email to confirm your account.

Register as Prime Manager

Register as Prime Manager

The Prime Manager is a manager that has the right to appoint other managers within the Site-tree of his organisation. To register as Prime Manager yourself, you must be a KUARIO user and be registered via an email request by a person known by the KUARIO organisation.

Prerequisites:

- Registered as KUARIO user
- Your organisation does not have a prime KUARIO manager yet
- The person sending the Prime Manager request is known by the KUARIO organisation.
- Prime Site name should be known

Register Manager

Send an email to sales@KUARIO.com requesting to be registered as the prime manager for your organisation, include the email address that should be linked to that account.

The prime Site will be registered also in this process. So please also include the name of the prime Site in the email.

Prime Site

The prime Site is the first Site registered by your organisation with KUARIO. It is the top or root Site in your Site tree, all of your other Sites will be created (directly or further down) under it.

Register a Manager to a Site

Register a Manager to a Site

Site Managers or Managers for short are KUARIO users that have control over the Prices, Products, Templates and Outlets in their Site and the Sites below. To add a manager to a Site simply add his email address in the manager field. A KUARIO manager must be a KUARIO user and must be an appointed manager by the KUARIO organisation. The Prime Manager is able to send an email request beforehand, requesting certain users to be made manager.


Prerequisites:

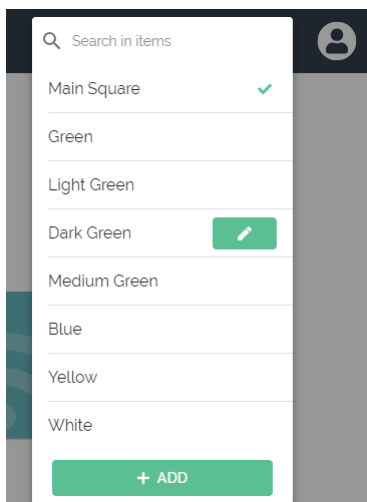
- Manager-to-be must be a KUARIO user
- Manager-to-be's email address (as in his or her KUARIO Account) must be known
- You must be a registered user that has been appointed 'Manager' by KUARIO. (When you have do not have the correct rights, let your Prime Manager send an email request to sales@KUARIO.com).

Where

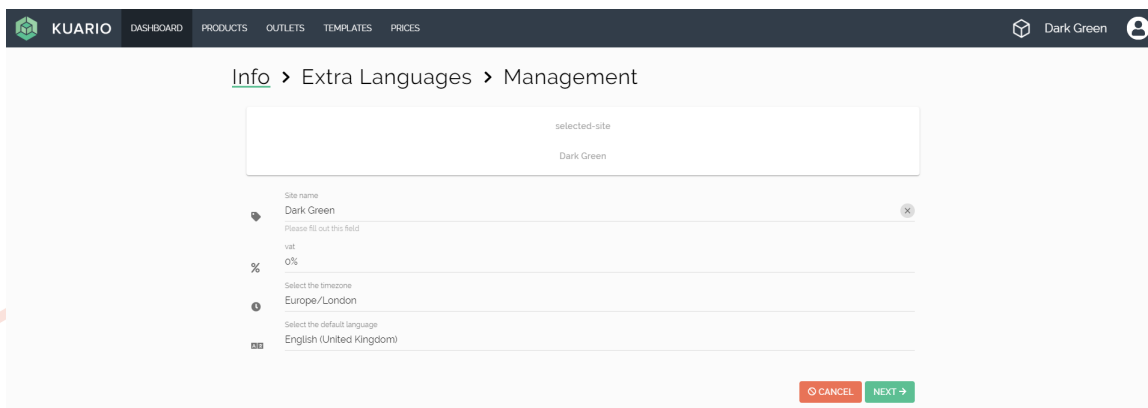
- Menu bar - Current Site

Register Manager

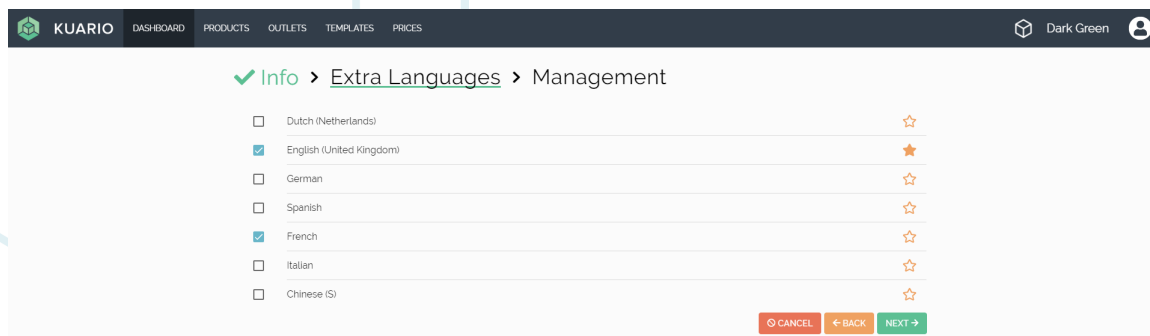
1. Click on the edit  symbol, next to the Site that you need to assign a manager to.



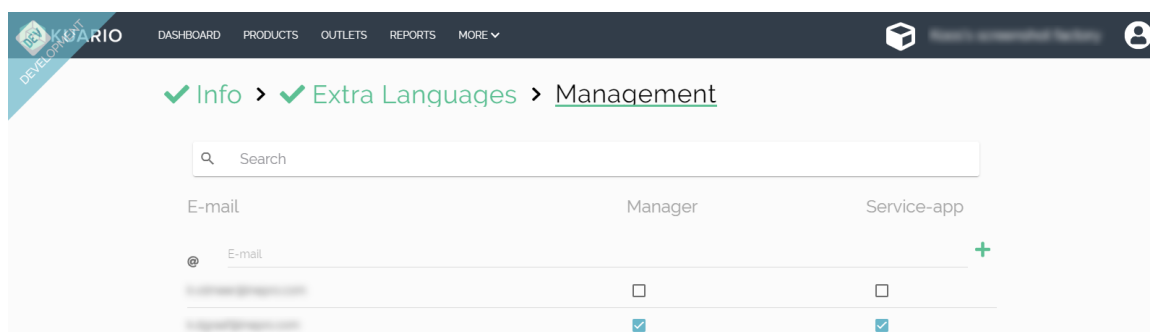
The first step of the Site edit process, 'Info' will open.



2. Edit the Site name (optionally).
3. Click 'NEXT →'.



4. Edit the manager's email address. The email address is the link to the manager's account in KUARIO.
5. Click + to add the manager's email address.



6. Click the manager checkbox to make this person a Site manager ('Manager') and check the 'service-app' box to make him a service manager ('Service-app'). One person can have both roles.

Service Managers are KUARIO users that have the right to use the service part of the KUARIO app. The service part of the app is meant for field service engineers only. As a field service engineer you are responsible for the connection of the Devices (MFP) and KUARIO Pay Boxes to the Outlets created in the KUARIO Manager.

7. Click 'SAVE'.

Sites

Sites

A Site in KUARIO is an abstract place in which Outlets can be created. A Site has a name, a currency, time zone, default and extra languages, and a manager.

The manager can add Products that can be sold at the Site in the Outlets. Outlets must be created to be able sell those products.

Prerequisites:

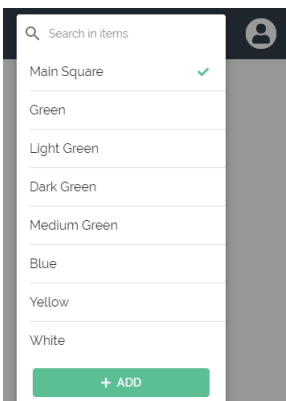
- Manager must have rights to add to parent Site
- Site name must be known
- Site currency must be known
- Site time zone must be known
- Default and optionally extra languages must be known
- Email address of the new Site's manager must be known

Where

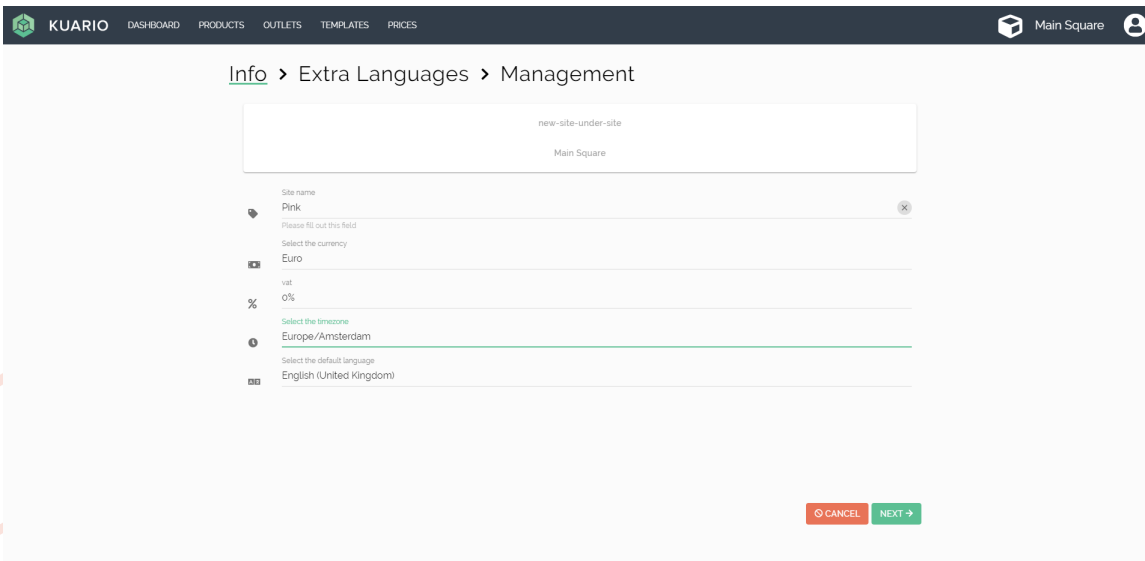
- Menu bar - Current Site

Create (Sub-)Site (a new Site under an existing Site)

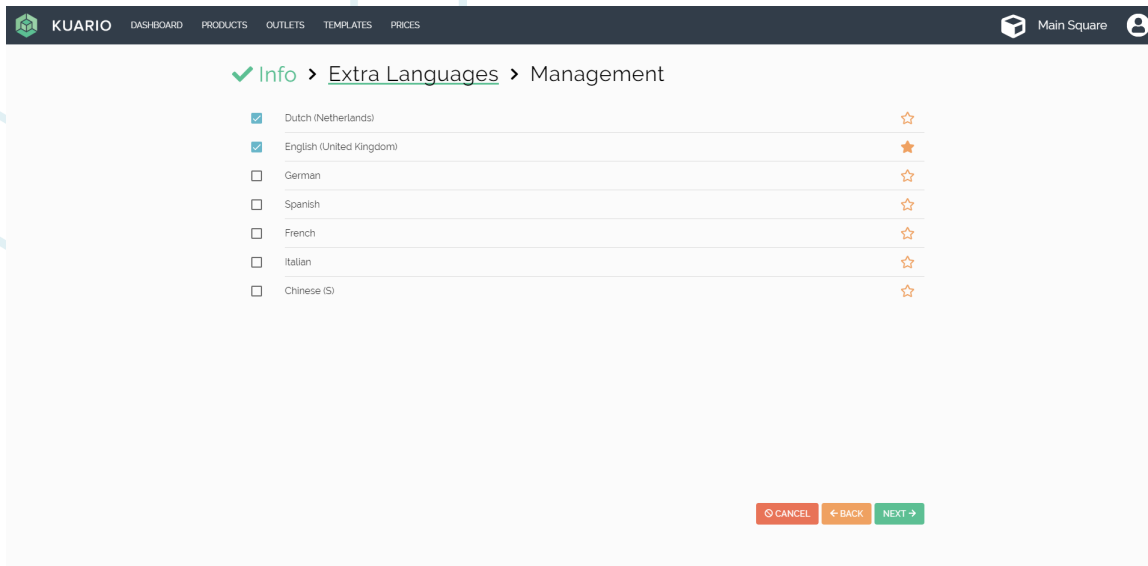
1. Select the parent Site that the new Site should be assigned to.



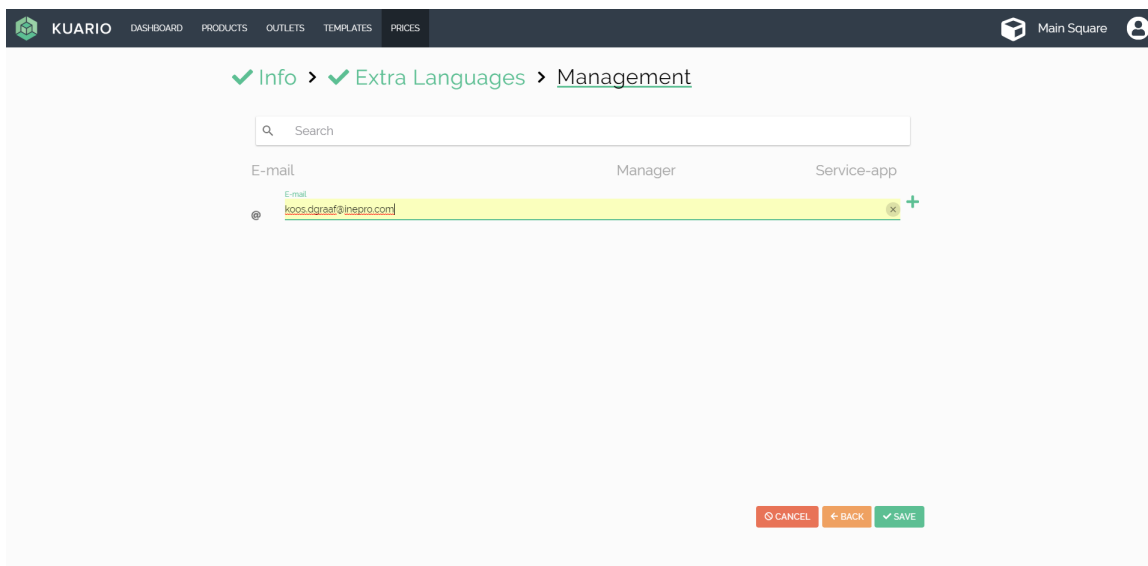
2. Click on the  ('+ Add') in the bottom of the Sites window.



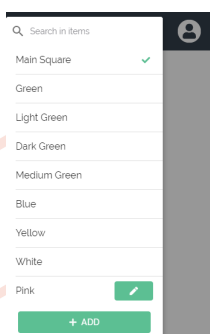
3. Add the Site name.
4. Add the Currency.
5. Add the VAT.
6. Add the Time Zone.
7. Add the default language.
8. Click 'NEXT →'.



9. (Optionally) Add the Extra Languages.
10. Click 'NEXT →'.



11. Add the manager's email address. The email address is the link to the manager's account in KUARIO.
12. Click 'SAVE'.



13. In the 'Sites' menu, the newly created Site is now available.

Products

Create Products

In the Products module you can see the list of all the products and also may add a Product. Products are either physical items or services sold at the Outlets. A product can have a fixed price or an open price. It can also have a certain VAT attached to it. For bar code scanners a 'Product identifier' should be added, this should be the code that the bar code should resolve to. The price of an item is the recommended price, the actual price is determined by the price line.

A product can also be edited at a later time, for instance to edit the recommended price.

Note: definition VAT

V.A.T. is Value Added Tax. The available VAT values are determined by the site's country value. You should be able to access to VAT values available in the country of your Site. If the values are not (or not all) available or if they have the wrong value please contact support@KUARIO.com

Note: definition Open Price

An open price is a price that is determined at the point-of-sale instead of pre-determined. Examples of this would be a 'Soup of the day' product that because of the ingredients has another cost price each day and is therefore priced accordingly each day. It could also be a range of products that you do not want to specify or a service that takes a different amount of time. When setting an open price, the price will be determined at the moment of sale, not before.


Prerequisites:

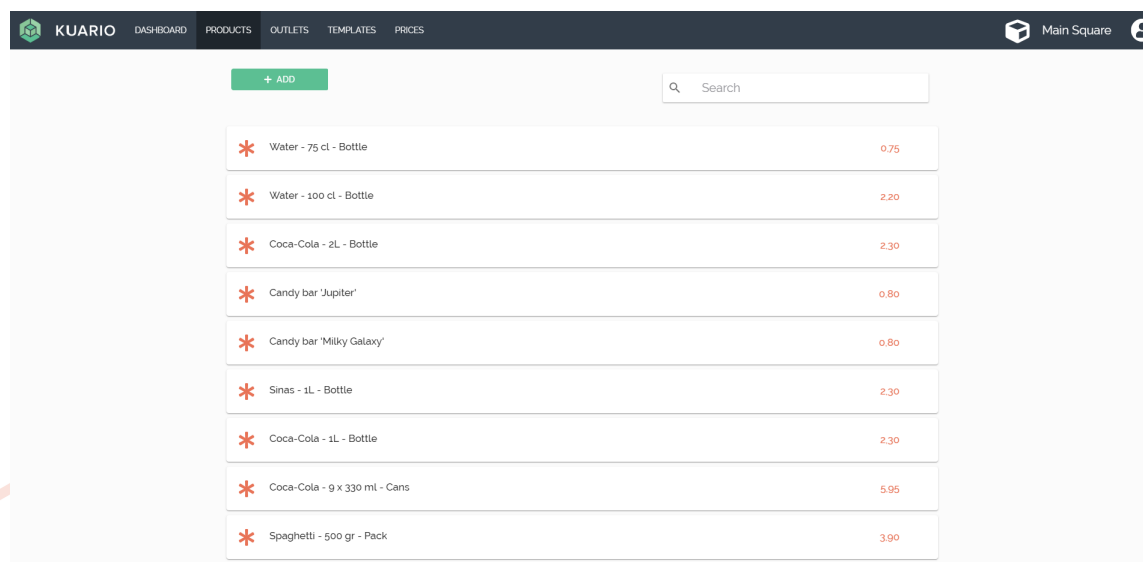
- Know the name of the Product to be
- Know the currency of the Product
- Know the price of the Product
- (optional) Know the identifier (or bar code) of the Product

Where

- Menu - Products

Create Products

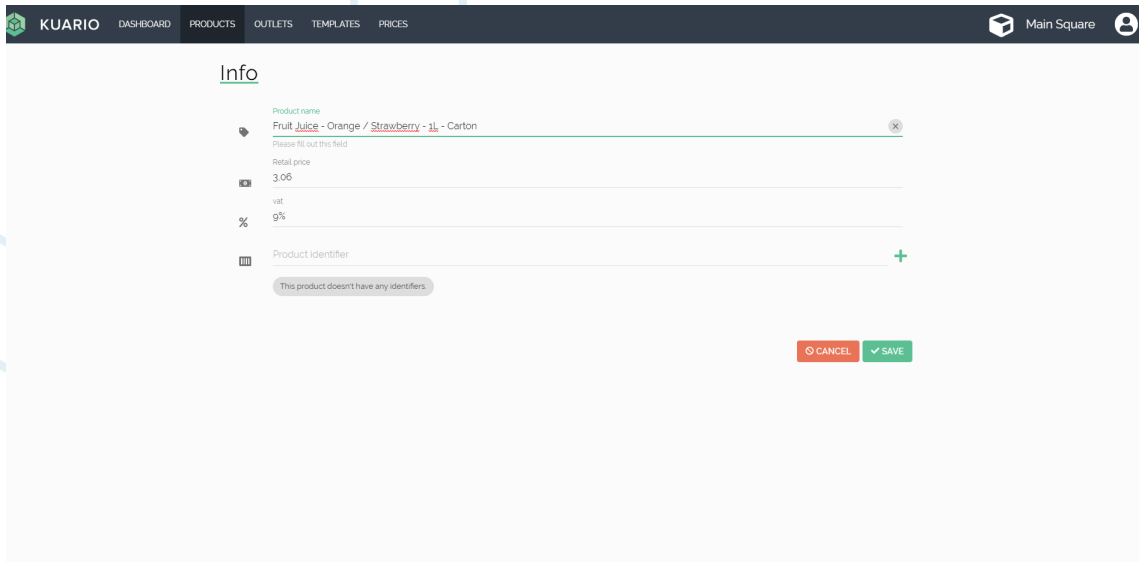
1. Go to 'Products'.
2. Click on the  ('+ Add') in the top-right corner.



The screenshot shows the KUARIO dashboard with the 'PRODUCTS' tab selected. A '+ ADD' button is visible in the top right corner. Below the navigation bar, there is a search bar and a list of products with their respective prices.

Product Name	Price
* Water - 75 cl - Bottle	0,75
* Water - 100 cl - Bottle	2,20
* Coca-Cola - 2L - Bottle	2,30
* Candy bar 'Jupiter'	0,80
* Candy bar 'Milky Galaxy'	0,80
* Sinas - 1L - Bottle	2,30
* Coca-Cola - 1L - Bottle	2,30
* Coca-Cola - 9 x 330 ml - Cans	5,95
* Spaghetti - 500 gr - Pack	3,90

3. Name the product (or service)
4. Set the (recommended) price.

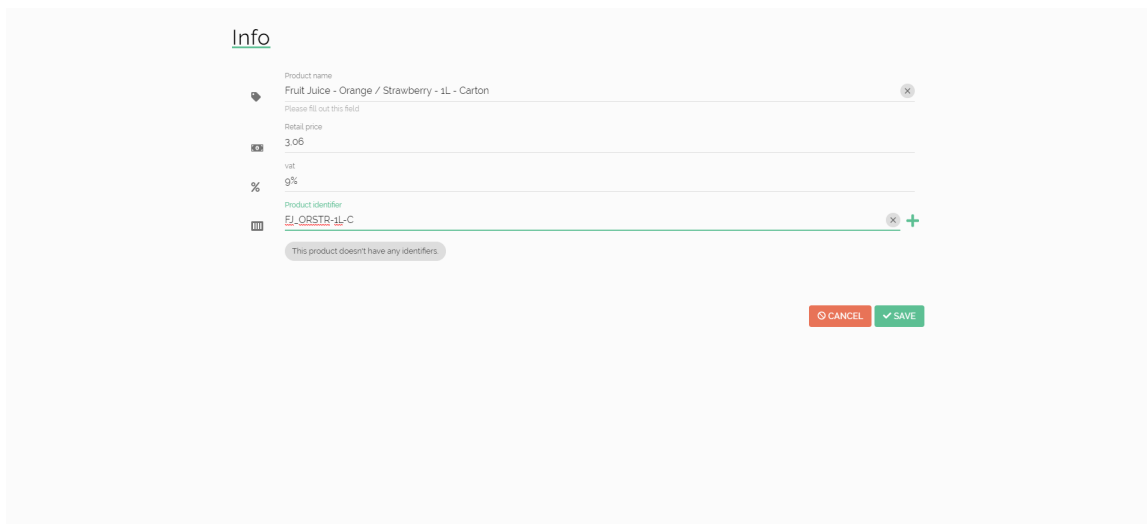


The screenshot shows the 'Info' form in the KUARIO system. The form is titled 'Info' and contains the following fields:

- Product name:** Fruit Juice - Orange / Strawberry - 1L - Carton. Below the field is a red error message: 'Please fill out this field'.
- Retail price:** 3.06
- vat:** 9%
- Product identifier:** This field is empty and has a red error message: 'This product doesn't have any identifiers'.

At the bottom right of the form, there are two buttons: 'CANCEL' (red) and 'SAVE' (green).

5. (Optionally) Enter the item identifier. Preferably a bar code value, so the item can be scanned.
6. Click 'SAVE'.



This screenshot shows the same 'Info' form as above, but with the 'Product identifier' field filled in with the value 'EJ_ORSTR-1L-C'. The red error message 'This product doesn't have any identifiers' is still present below the field. The 'SAVE' button is now highlighted in green, indicating it is the active button.

Edit Products

1. Go to 'Products'.
2. Click the Product you need to edit.
3. Follow steps 3 - 6 of 'Create Products'.

Best practices:

- The name of the product is also the display name, so make sure it is a good representation of the product and can easily be expanded with similar product names.
- Mind also the length of the product name so it will fit on the terminal display.

Prices

Prices

In 'Prices' you can add a new price line. All products have already a default or recommended price, the price they got when they were created. A product can also be created on a higher site level that you may have no access to. In cases where you deliver the same product but want to sell it for a different price, you can add a price line; a set of products with a different price and refer to that price in other parts of the KUARIO payment system.

A default price line will be created automatically for the Site containing all inherited items with their recommended prices.


Prerequisites:

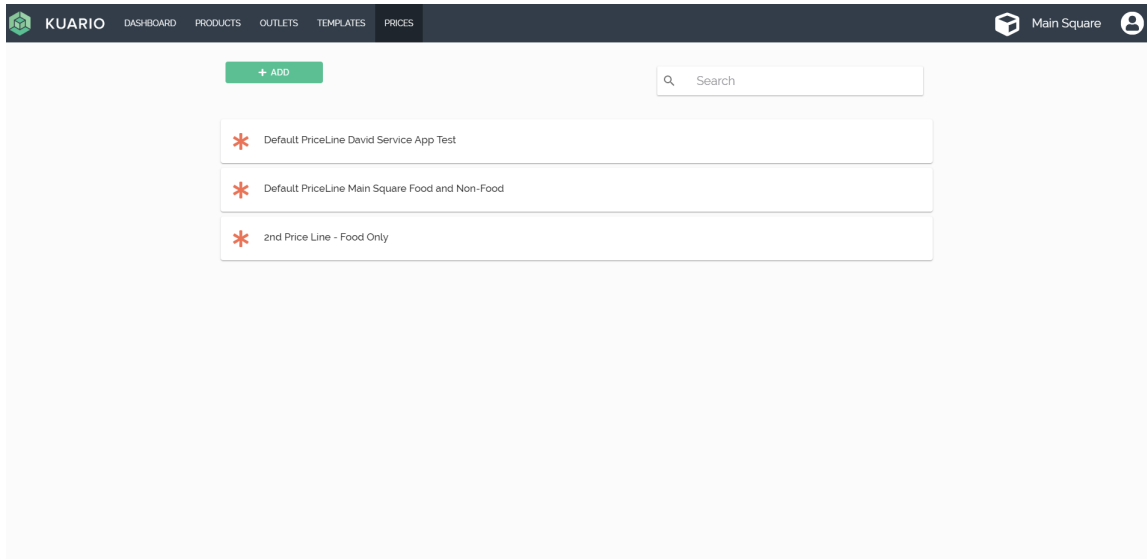
- One or more Products must exist

Where

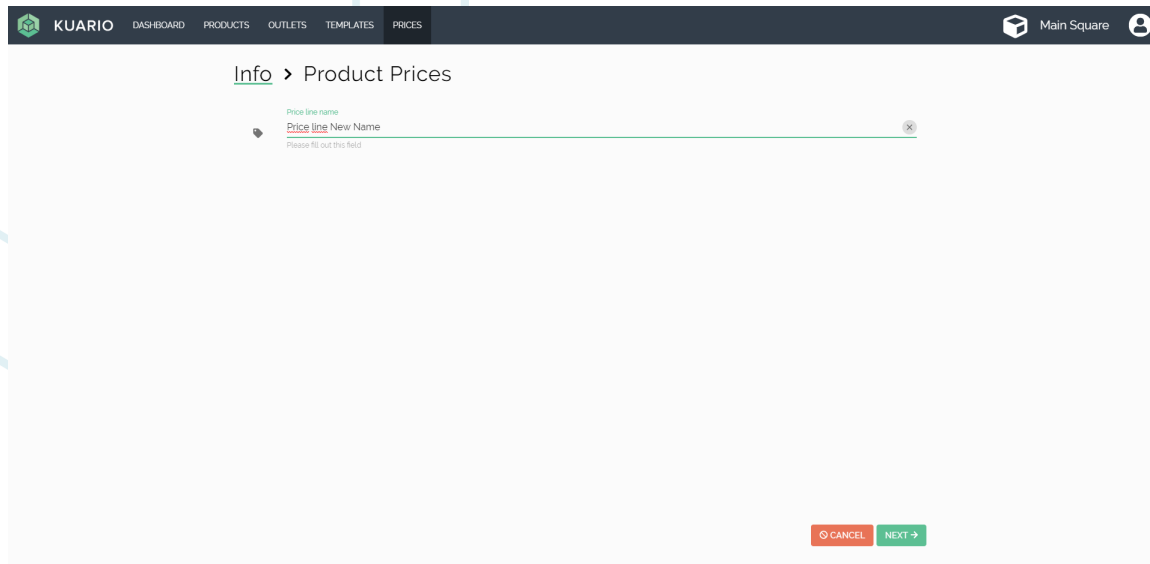
- Main Menu\Price lines

Create Price Line

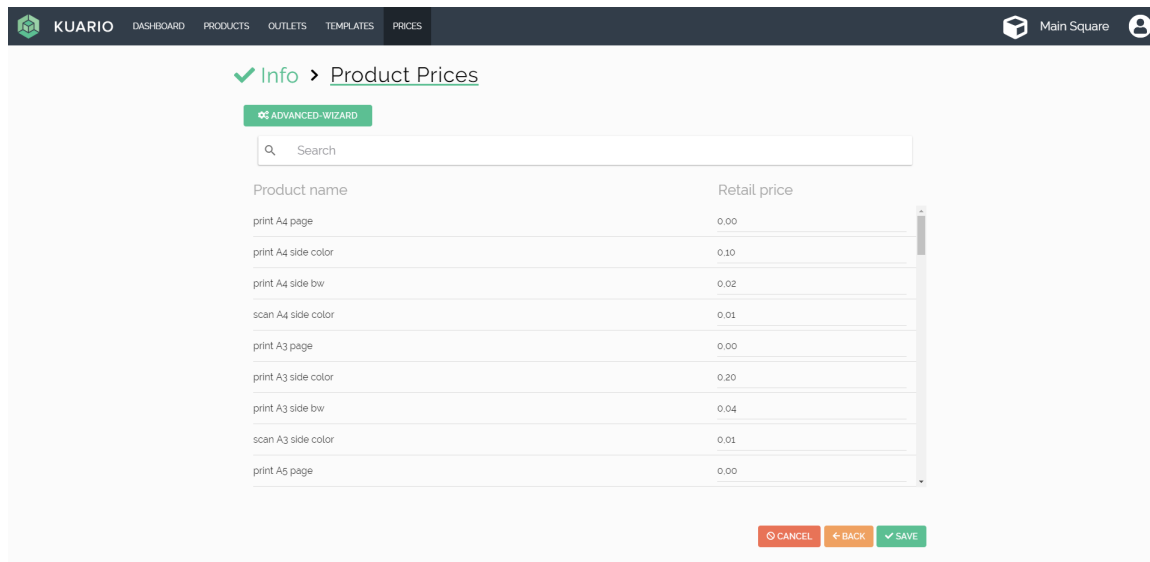
1. Go to Price lines.
2. Click on the  ('+ Add') in the top-right corner.



3. Set the name of the price line.
4. Click 'NEXT →'. Add Items for this price line.



5. Edit Item prices according to the goal of this price line.



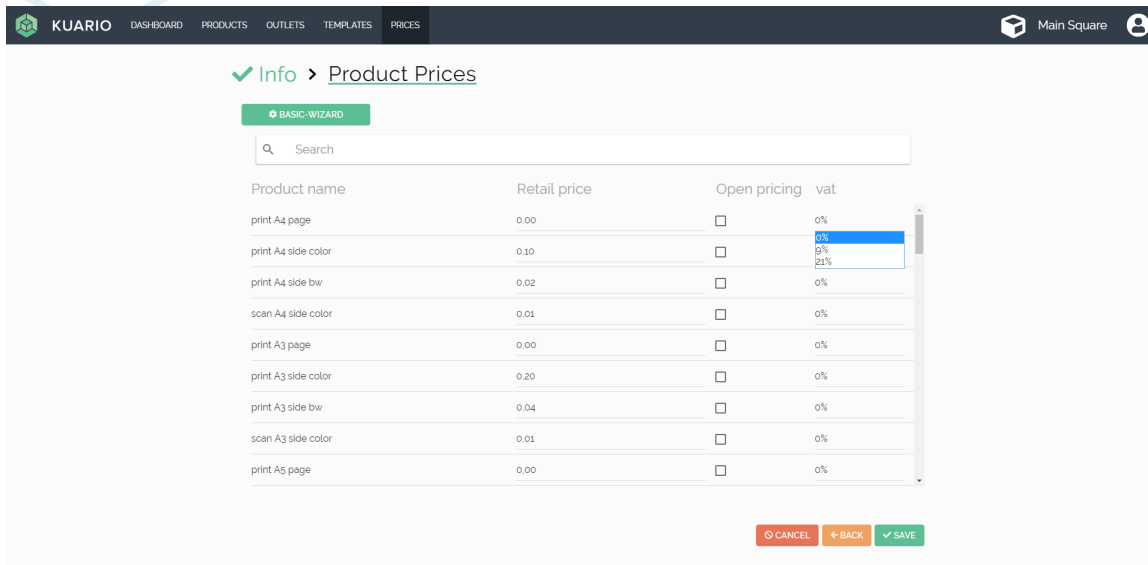
6. (Optionally) Click 'Advanced wizard' to edit 'Open Price' and 'VAT' values.

Note: definition VAT:

V.A.T. is Value Added Tax. The available VAT values are determined by the site's country value. You should be able to access to VAT values available in the country of your Site. If the values are not (or not all) available or if they have the wrong value please contact support@KUARIO.com

Note: definition Open Price:

An open price is a price that is determined at the point-of-sale instead of pre-determined. Examples of this would be a 'Soup of the day' product that because of the ingredients has another cost price each day and is therefore priced accordingly each day. It could also be a range of products that you do not want to specify or a service that takes a different amount of time. When setting an open price, the price will be determined at the moment of sale, not before.

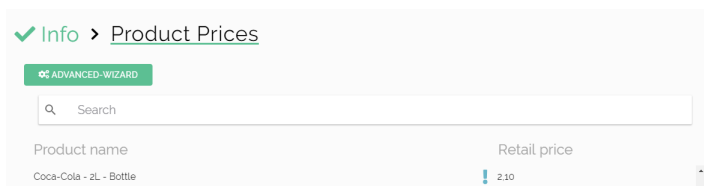


7. Click 'SAVE'.

Edit Price Line

1. Go to Price lines.
2. Click the price line you need to edit.
3. Follow steps 3-7 of 'Create Price Line'.

Note: Prices in an existing Price Line can be overwritten! These new prices are only locally part of this Price Line, that is; on your Site and the Sites below. These overwritten price are indicated with a blue exclamation mark.



Outlets

Outlets

In the Outlets module you can see the Outlets. An Outlets is an abstract single spot from where you can sell or just distribute products or services. Outlets can have two types of Terminals, an Order Terminal or an Payment Terminal. Each Outlet can only hold at maximum one type of terminal (for example: an order terminal and a payment terminal | an order terminal | no terminals). So a Site with two MFP's, three vending machine's and a Pay Point holds (at least) 6 Outlets, no matter how physically close these are to each other.

An end-user would use an Outlet to buy a product, load credit to his or her account, pay a previously placed order or just register the consummation of a product or service.

i Note: It is possible to add an Order Terminal or a Payment Terminal to certain types of Outlets in the manager, however the KUARIO app service module was created especially for this purpose. It will enable you to quickly scan a QR code belonging to the terminal and add that terminal to the selected Outlet. So please make it easy on yourself and use the service module in the KUARIO mobile app: [Android](#) | [Apple](#)

Prerequisites:

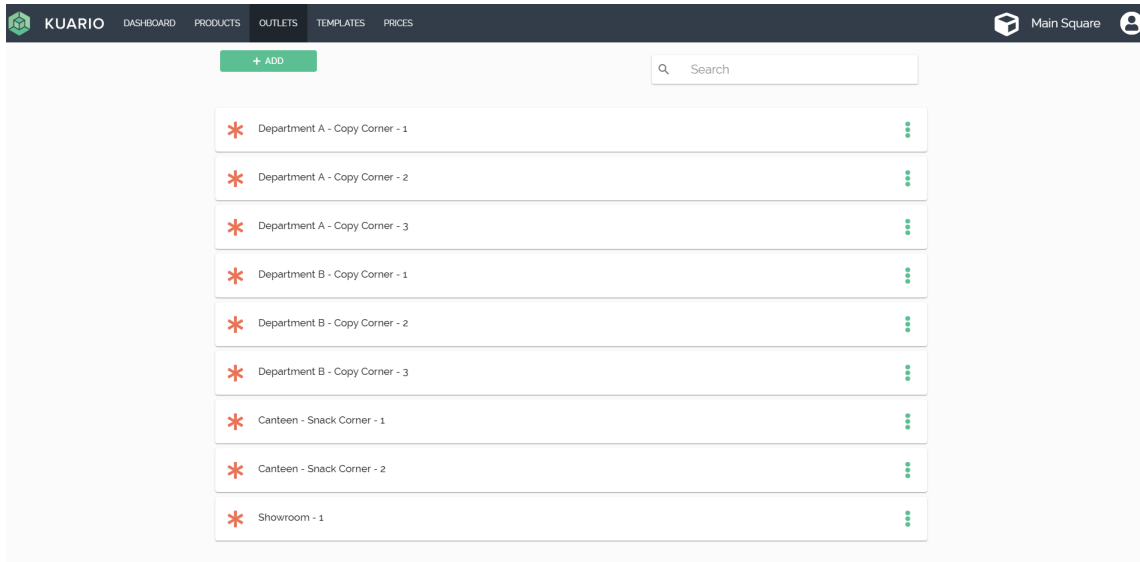
- The Site that this Outlet should belong to should be known
- The Outlet name should be known

Where

- Menu - Outlet

Create Outlet

1. Go to Outlets.
2. Click on the + ADD ('+ Add') in the top-right corner.



3. Choose an Outlet Type:
 - a. Cash Register -> Go to step 4.
 - b. MFP -> Go to step 11.
 - c. Vending Machine -> Go to step 18.
 - d. Pay Point -> Go to step 25.
 - e. Click Interface -> Go to step 32.
 - f. Card Connector -> Go to step 39.
 - g. Timer -> Go to step 46.
 - h. Coin Validator -> Go to step 51.
 - i. Gateway -> Go to step 56.

Cash Register

A 'Cash Register Outlet' is an outlet that has 1 Order terminal and is compatible with Basic and 'Cash Register' templates.

4. Choose an Outlet name.
5. Check that the Outlet is active (if it should be).
6. Select 'Cash Register'.

Info > Terminals > Extra

Outlet name
Cash

Please fill out this field

Is this outlet active?

CASHREGISTER MFP VENDINGMACHINE PAYPOINT

CLICKINTERFACE CARDCONNECTOR TIMER COINVALIDATOR

GATEWAY

CANCEL NEXT >

7. (Optionally) Assign Order Terminal, Check 'order-terminal'.
 - a. Enter the Device address.
 - b. Enter the Device name.

Info > Terminals > Extra

order-terminal

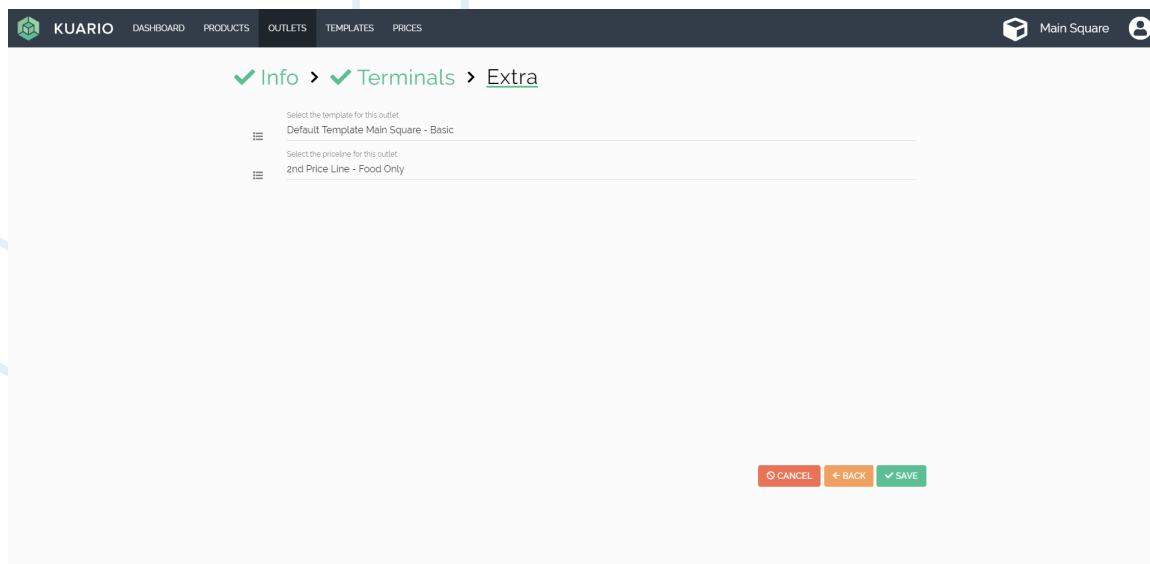
Device address
CASH2-5634127890

Please fill out this field

Device name
Block 2 - Register

CANCEL BACK NEXT >

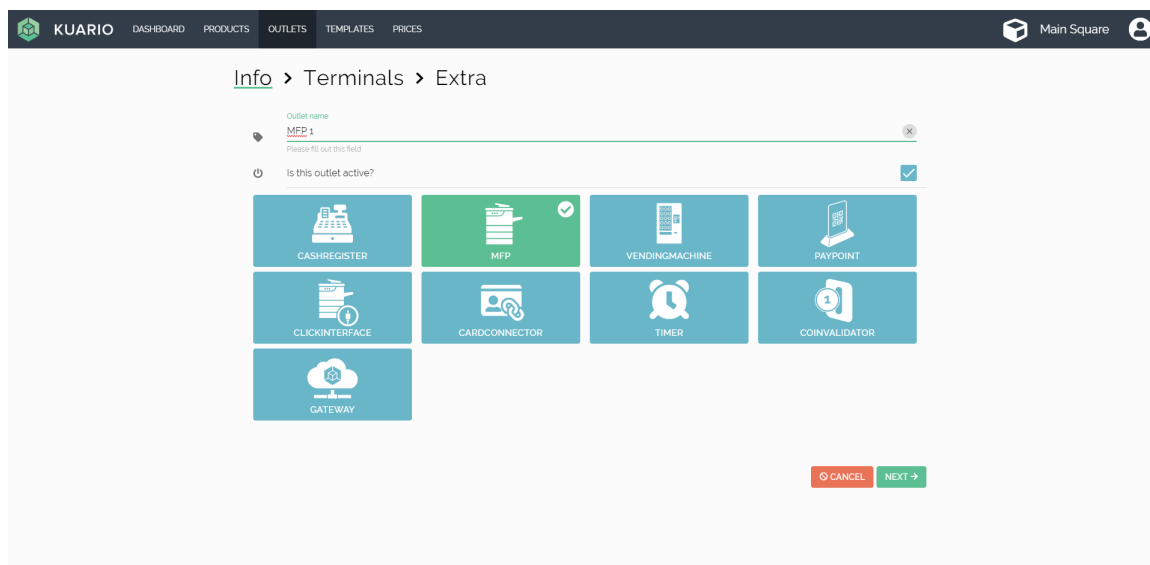
8. Select the template for this Outlet.
9. Select the price line for this Outlet.



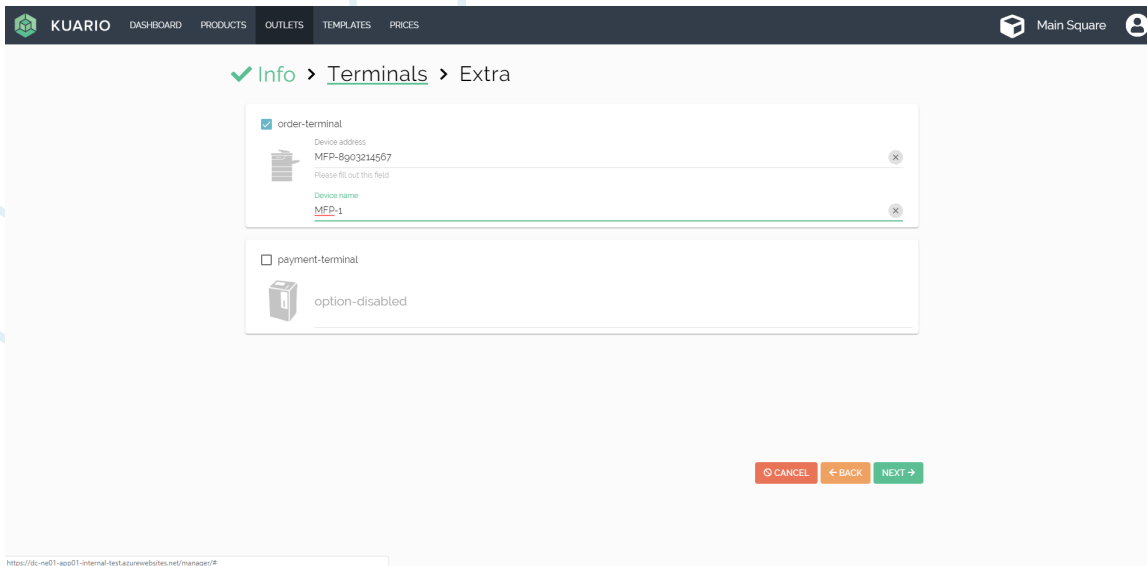
10. Click ' **SAVE** '.

MFP
 An MFP Outlet is an outlet that is compatible with Basic and MFP Templates. It can have an Order Terminal, a Payment Terminal, or both an Order terminal and a Payment Terminal.

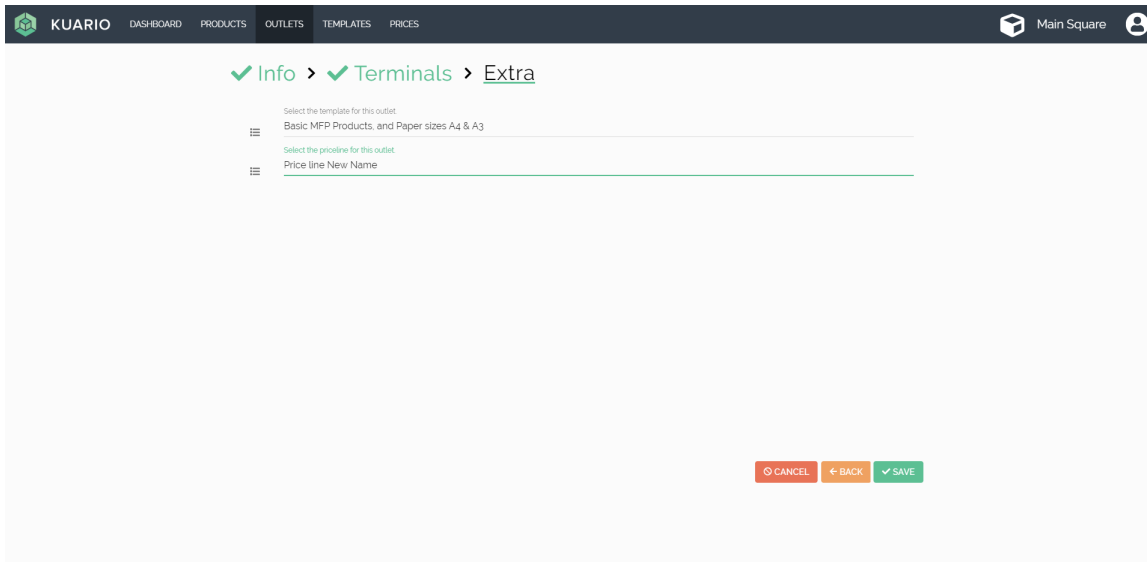
11. Choose an Outlet name.
12. Check that the Outlet is active (if it should be).
13. Select 'MFP'.



- 14. (Optionally) Assign Order Terminal, Check 'order-terminal'.
 - a. Enter the Device address.
 - b. Enter the Device name.



- 15. Select the template for this Outlet.
- 16. Select the price line for this Outlet.



- 17. Click 'SAVE'.

Vending Machine

A Vending Machine Outlet is compatible with Basic and Vending Machine templates. It can have an Order Terminal.

18. Choose an Outlet name.

19. Check that the Outlet is active (if it should be).

20. Select 'Vending Machine'.

Info > Terminals > Extra

Outlet name
Vending 1
Please fill out this field

Is this outlet active?

CASHREGISTER MFP VENDINGMACHINE PAYPOINT

CLICKINTERFACE CARDCONNECTOR TIMER COINVALIDATOR

GATEWAY

CANCEL NEXT

21. (Optionally) Assign Order Terminal, Check 'order-terminal'.

a. Enter the Device address.

b. Enter the Device name.

Info > Terminals > Extra

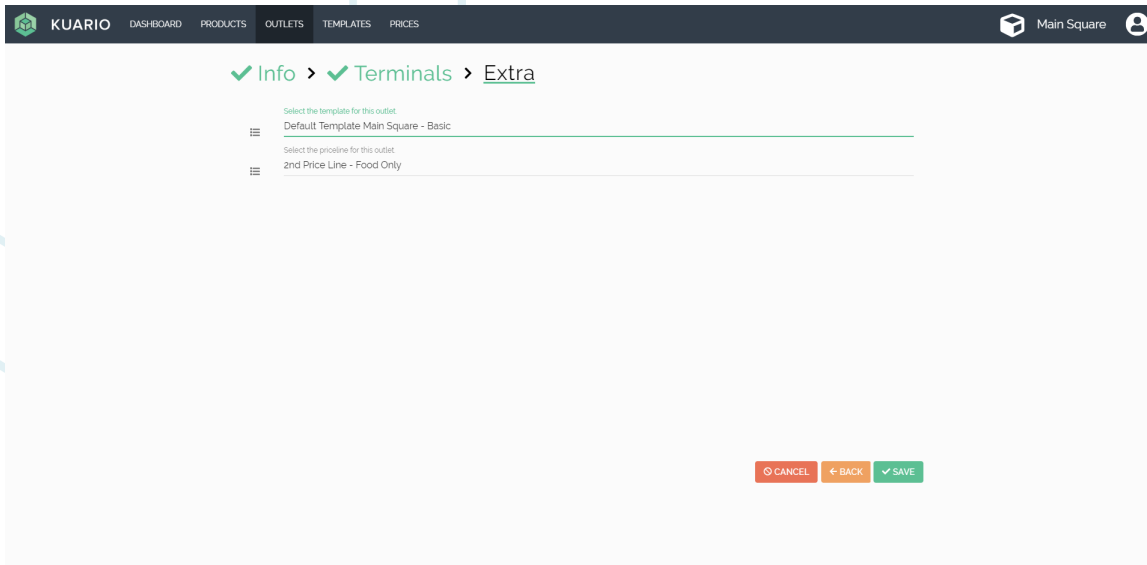
order-terminal

Device address
V1-7890213456
Please fill out this field

Device name
Vending 1

CANCEL BACK NEXT

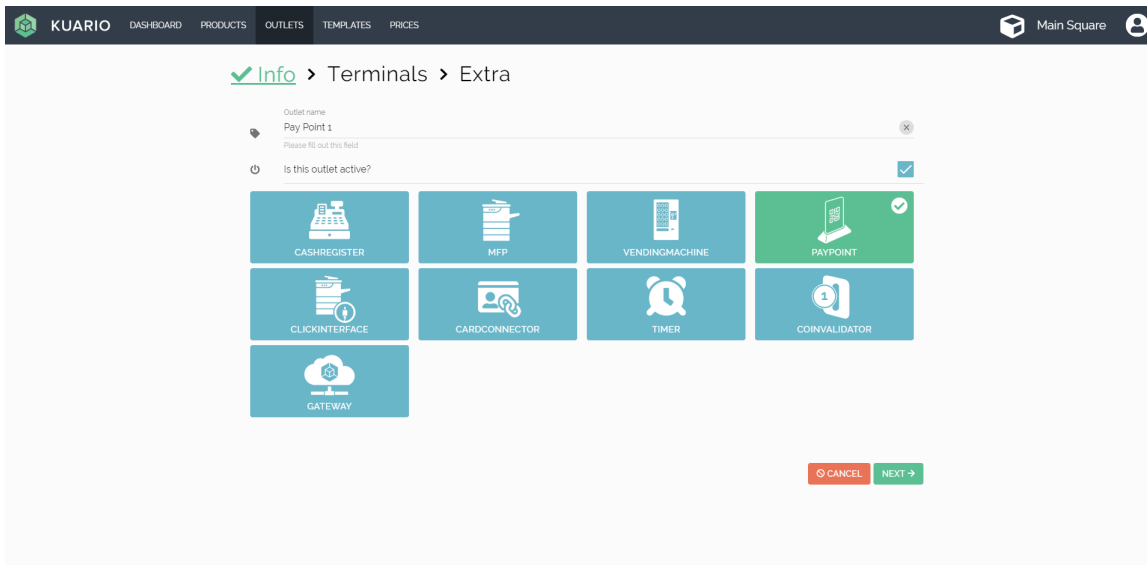
- 22. Select the template for this Outlet.
- 23. Select the price line for this Outlet.



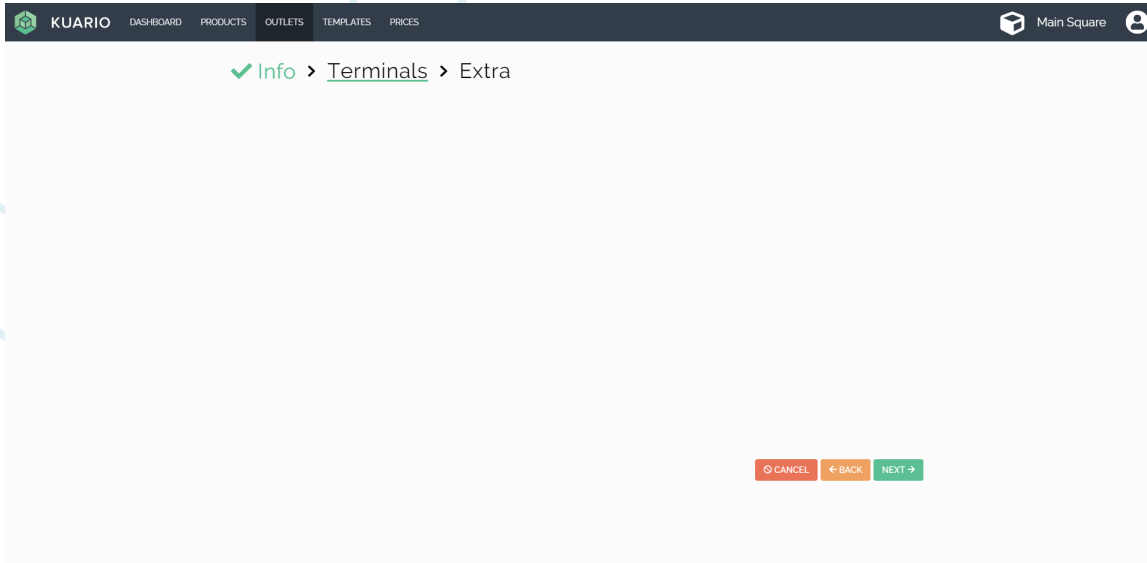
24. Click 'SAVE'.

Pay Point

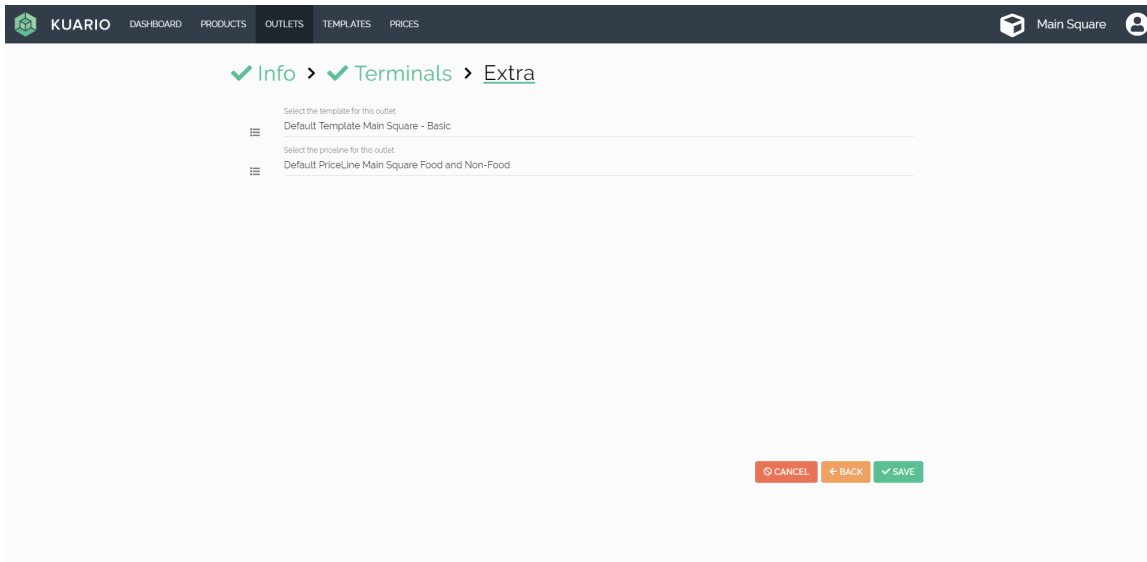
- 25. Choose an Outlet name.
- 26. Check that the Outlet is active (if it should be).
- 27. Select 'Pay Point'.



28. (Optionally) Assign Order Terminal, Check 'order-terminal'.
- a. Enter the Device address.
 - b. Enter the Device name.



29. Select the template for this Outlet.
30. Select the price line for this Outlet.



31. Click 'SAVE'.

Click Interface

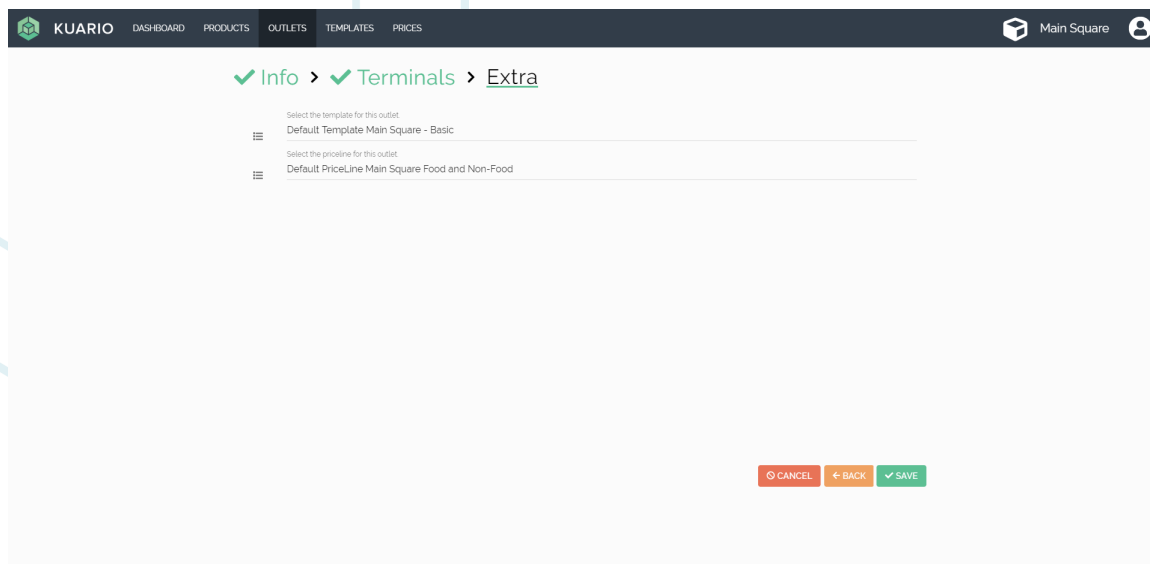
32. Choose an Outlet name.
33. Check that the Outlet is active (if it should be).
34. Select 'Click Interface'.

The screenshot shows the SKUARIO dashboard with the navigation menu (SKUARIO, DASHBOARD, PRODUCTS, OUTLETS, TEMPLATES, PRICES) and user information (Main Square). The breadcrumb trail is 'Info > Terminals > Extra'. The 'Outlet name' field contains 'Click Interface 1'. The 'Is this outlet active?' checkbox is checked. A grid of terminal icons is displayed, with 'CLICKINTERFACE' highlighted in green and marked with a checkmark. Other icons include CASHREGISTER, MFP, VENDINGMACHINE, PAYPOINT, CARDCONNECTOR, TIMER, COINVALIDATOR, and GATEWAY. At the bottom right, there are 'CANCEL' and 'NEXT >' buttons.

35. (Optionally) Assign Order Terminal, Check 'order-terminal'.
 - a. Enter the Device address.
 - b. Enter the Device name.

The screenshot shows the SKUARIO dashboard with the navigation menu and user information. The breadcrumb trail is 'Info > Terminals > Extra'. The 'order-terminal' checkbox is checked. The 'Device address' field contains 'CLK-012g384756'. The 'Device name' field contains 'Click Terminal 1'. At the bottom right, there are 'CANCEL', '<- BACK', and 'NEXT >' buttons.

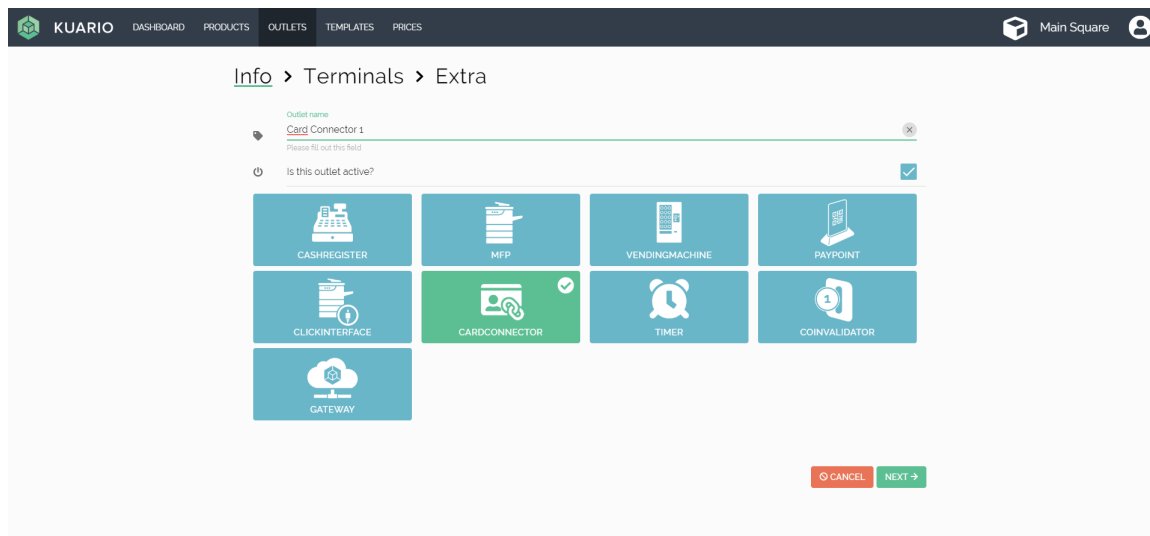
- 36. Select the template for this Outlet.
- 37. Select the price line for this Outlet.



- 38. Click 'SAVE'.

Card Connector

- 39. Choose an Outlet name.
- 40. Check that the Outlet is active (if it should be).
- 41. Select 'Card Connector'.



42. (Optionally) Assign Order Terminal, Check 'order-terminal'.
- Enter the Device address.
 - Enter the Device name.

The screenshot shows the KUARIO interface with a navigation bar at the top containing 'KUARIO', 'DASHBOARD', 'PRODUCTS', 'OUTLETS', 'TEMPLATES', and 'PRICES'. On the right side of the navigation bar, there is a 'Main Square' logo and a user profile icon. The main content area has a breadcrumb trail: 'Info > Terminals > Extra'. Below this, there is a configuration box for 'order-terminal' which is checked. It contains two input fields: 'Device address' with the value 'CC-1209437865' and 'Device name' with the value 'Card Connector 1'. At the bottom of the configuration box, there are three buttons: 'CANCEL', '← BACK', and 'NEXT →'.

43. Select the template for this Outlet.
44. Select the price line for this Outlet.

The screenshot shows the KUARIO interface with the same navigation bar as the previous screenshot. The breadcrumb trail is now 'Info > ✓ Terminals > Extra'. The main content area shows two selection steps. The first step is 'Select the template for this outlet' with a dropdown menu showing 'Default Template Main Square - Basic'. The second step is 'Select the price line for this outlet' with a dropdown menu showing 'Default PriceLine Main Square Food and Non-Food'. At the bottom of the configuration area, there are three buttons: 'CANCEL', '← BACK', and '✓ SAVE'.

45. Click '✓ SAVE'.

Timer

46. Choose an Outlet name.
47. Check that the Outlet is active (if it should be).
48. Select 'Timer'.

Info > Terminals

Outlet name
Timer |
Please fill out this field

Is this outlet active?

CASHREGISTER MFP VENDINGMACHINE PAYPOINT
CLICKINTERFACE CARDCONNECTOR **TIMER** COINVALIDATOR
GATEWAY

CANCEL NEXT >

49. (Optionally) Assign Order Terminal, Check 'order-terminal'.
 - a. Enter the Device address.
 - b. Enter the Device name.

Info > Terminals

order-terminal

Device address
TIM-0981237654
Please fill out this field

Device name
Timer 1

CANCEL BACK SAVE

50. Click 'SAVE'.

Coin Validator

51. Choose an Outlet name.
52. Check that the Outlet is active (if it should be).
53. Select 'Coin Validator'.

Info > Terminals

Outlet name
Coin Validator 1
Please fill out this field

Is this outlet active?

CASHREGISTER MFP VENDINGMACHINE PAYPOINT
CLICKINTERFACE CARDCONNECTOR TIMER COINVALIDATOR
GATEWAY

CANCEL NEXT >

54. (Optionally) Assign Order Terminal, Check 'order-terminal'.
 - a. Enter the Device address.
 - b. Enter the Device name.

Info > Terminals

order-terminal

Device address
CV-102g384756
Please fill out this field

Device name
Coin Validator 1

CANCEL BACK SAVE

55. Click 'SAVE'.

Gateway

56. Choose an Outlet name.

57. Check that the Outlet is active (if it should be).

58. Select 'Gateway'.

Info > Terminals

Outlet name
Gateway

Please fill out this field

Is this outlet active?

CASHREGISTER MFP VENDINGMACHINE PAYPOINT

CLICKINTERFACE CARDCONNECTOR TIMER COINVALIDATOR

GATEWAY

CANCEL NEXT >

59. (Optionally) Assign Order Terminal, Check 'order-terminal'.

a. Enter the Device address.

b. Enter the Device name.

Info > Terminals

order-terminal

Device address
GW-4321870509

Please fill out this field

Device name
Gateway

CANCEL BACK SAVE

60. Click 'SAVE'.

Finish

61. The Outlet should now be shown in the list of Outlets.

Templates

Templates

Templates determine which products are sold. Templates have different Template Types, the default type is 'Basic', other types are 'Cash Register', 'MFP', 'Vending Machine', 'Pay Point'. Each template other than 'Basic', has input features specific to its type. A 'Cash Register' template for example has 'Tabsheets'; a tab sheet is a sheet with product buttons as they would be displayed on the cash register as one of the product pages.

Using Templates you can restrict the number of sold items.


Prerequisites:

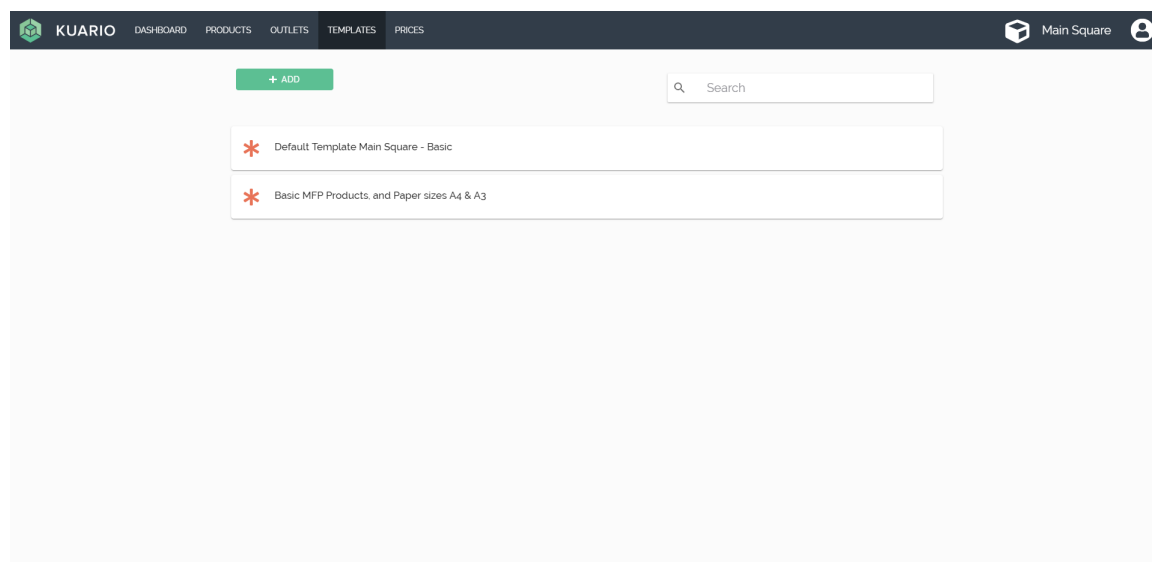
- Product(s)
- Outlet(s) (Optional)

Where

- Main Menu\Templates

Create Template

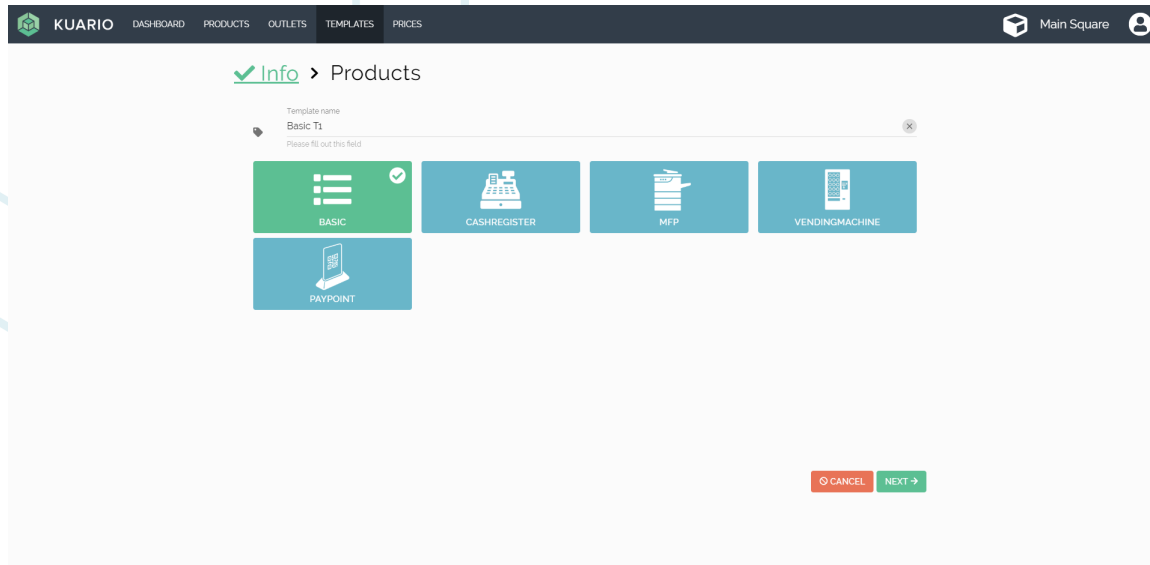
1. Click on the  ('+ Add') in the top-right corner.



2. Pick the template type (Basic, Cash Register, MFP, Pay Point or Vending Machine) this template can be used for (one type possible per template).
3. Choose an Outlet Type:
 - a. Basic -> Go to step 4.
 - b. Cash Register -> Go to step 8.
 - c. MFP -> Go to step 16.
 - d. Pay Point -> Go to step 20.
 - e. Vending Machine -> Go to step 24.

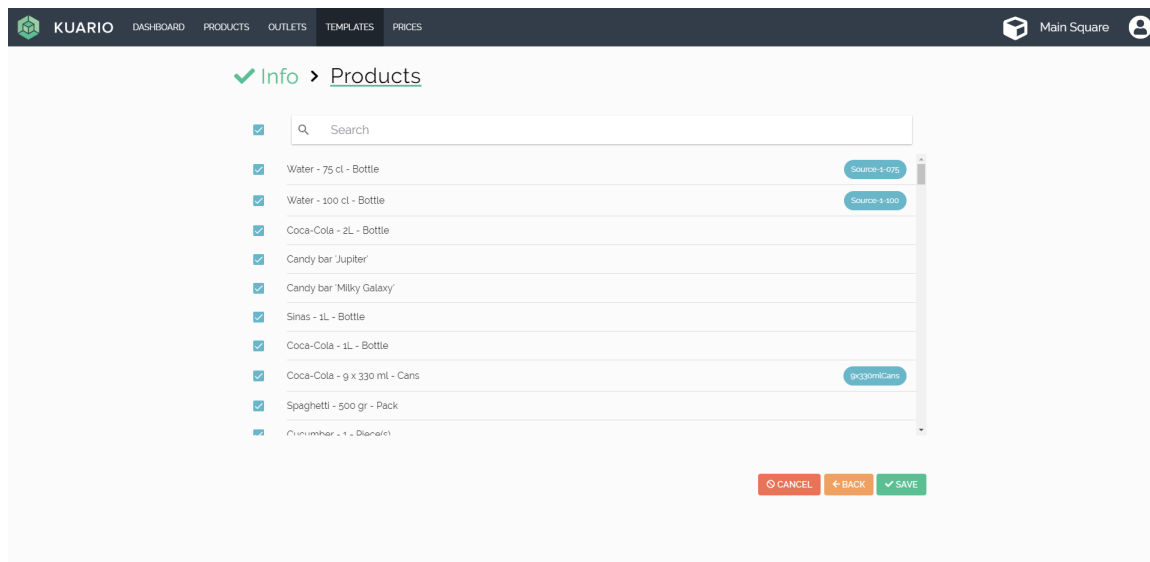
Basic

4. Click 'NEXT →'.



5. Tick the items that are to be sold in using this template.

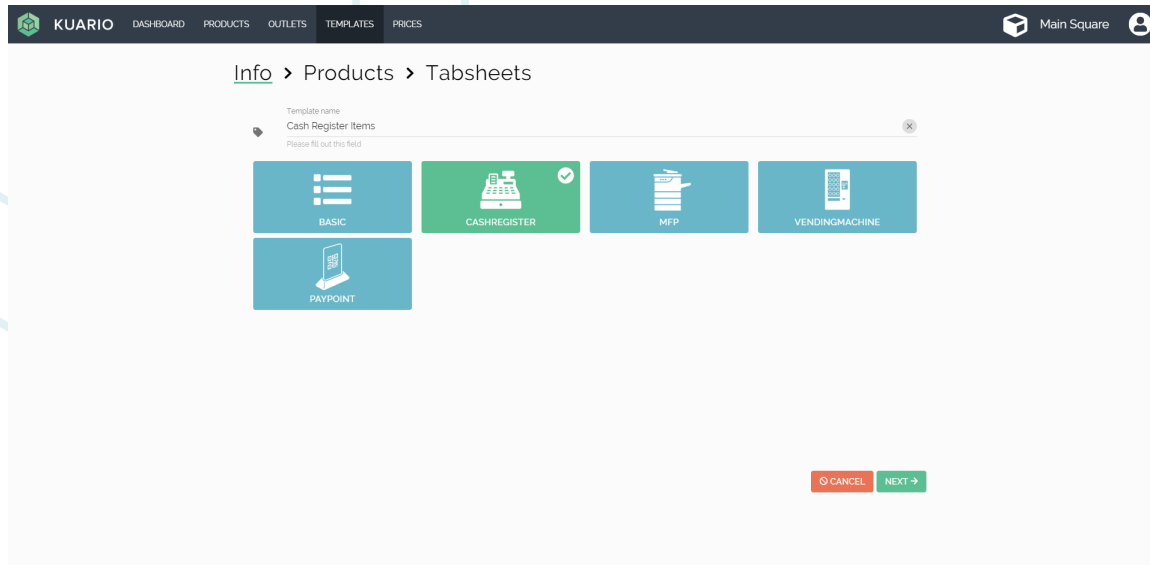
6. Click 'NEXT →'.



7. Click 'SAVE'.

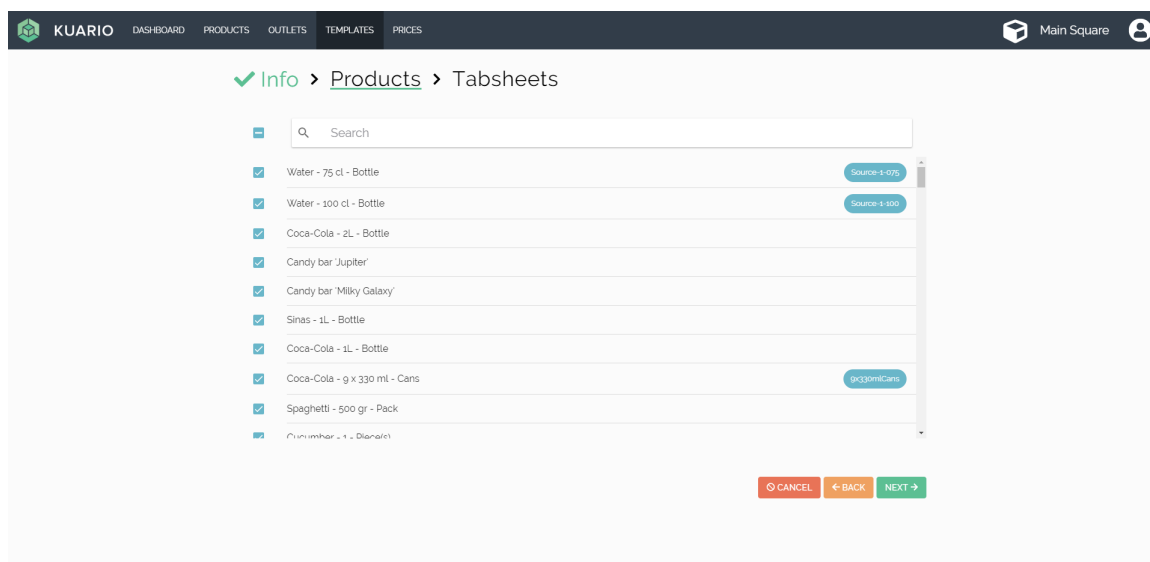
Cash Register

8. Click 'NEXT →'.

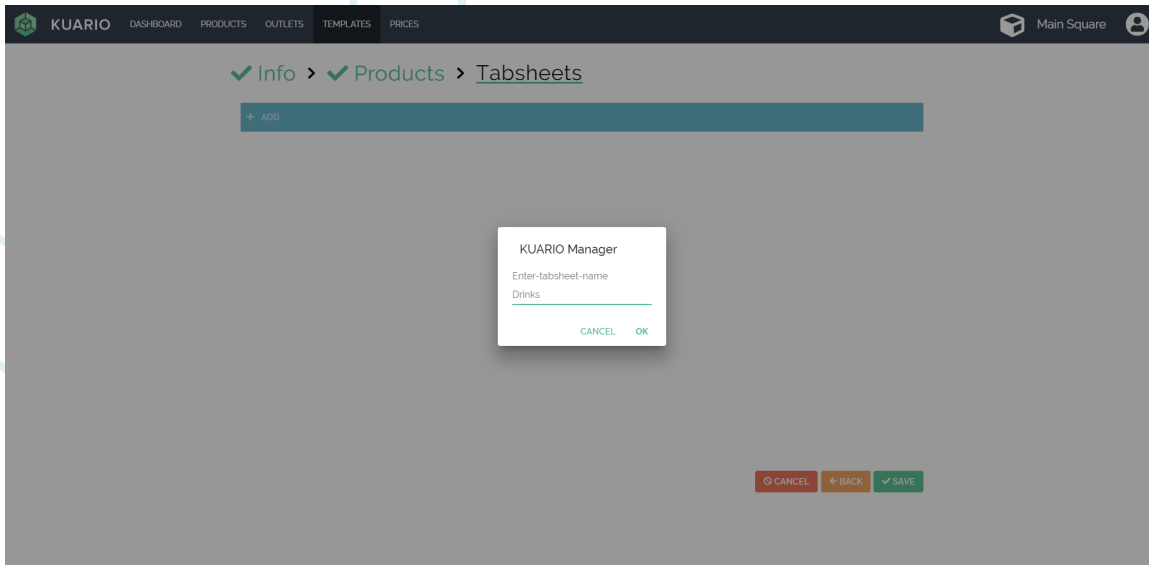


9. Tick the items that are to be sold in using this template.

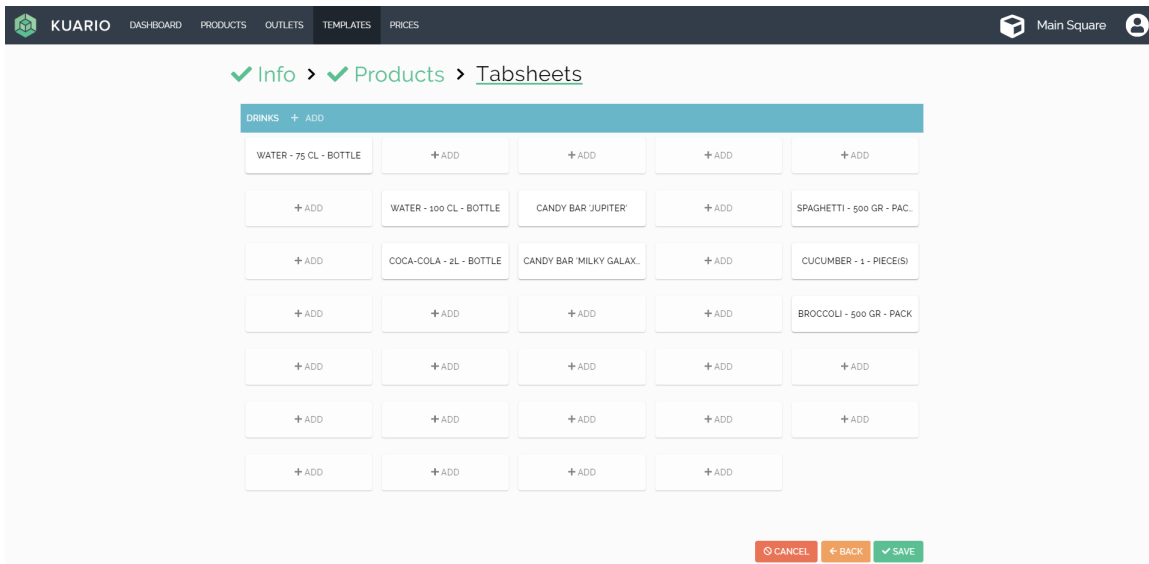
10. Click 'NEXT →'.



- 11. Create a new Tab Sheet.
- 12. Name the Tab Sheet en click OK.



- 13. Click that name in the Tab sheet bar.
- 14. Select products on the Tab Sheet.



- 15. Click 'SAVE'.

MFP
16. Click 'NEXT →'.

Info > Products

Template name
T - MFP - 1
Please fill out this field

BASIC CASHREGISTER MFP VENDINGMACHINE

PAYPOINT

CANCEL NEXT →

<https://64-ne01-app01-internal-test.azurewebsites.net/manager/#>

17. Tick the items that are to be sold in using this template.
18. Click 'NEXT →'.

Info > Products

Search

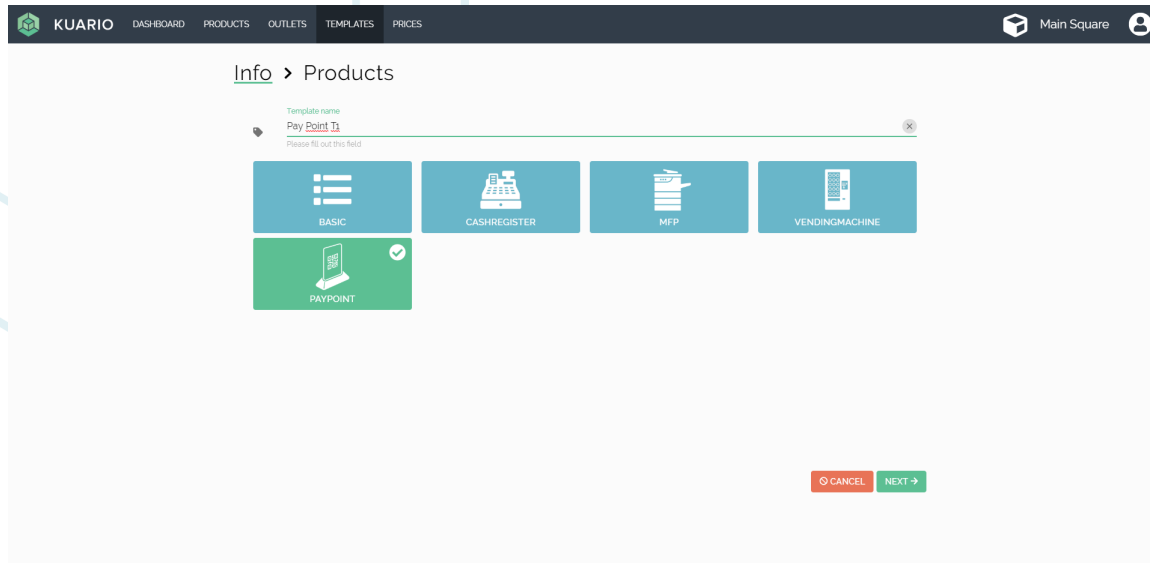
<input checked="" type="checkbox"/>	scan A4 side bw	scan A4 bw
<input checked="" type="checkbox"/>	scan A3 side bw	scan A3 bw
<input checked="" type="checkbox"/>	scan A5 side bw	scan A5 bw
<input checked="" type="checkbox"/>	scan B5 side bw	scan B5 bw
<input checked="" type="checkbox"/>	scan B4 side bw	scan B4 bw
<input checked="" type="checkbox"/>	scan Letter side bw	scan Letter bw
<input checked="" type="checkbox"/>	scan Ledger side bw	scan Ledger bw
<input checked="" type="checkbox"/>	scan Executive side bw	scan Executive bw
<input checked="" type="checkbox"/>	scan Statement side bw	scan Statement bw

CANCEL ← BACK SAVE

19. Click 'SAVE'.

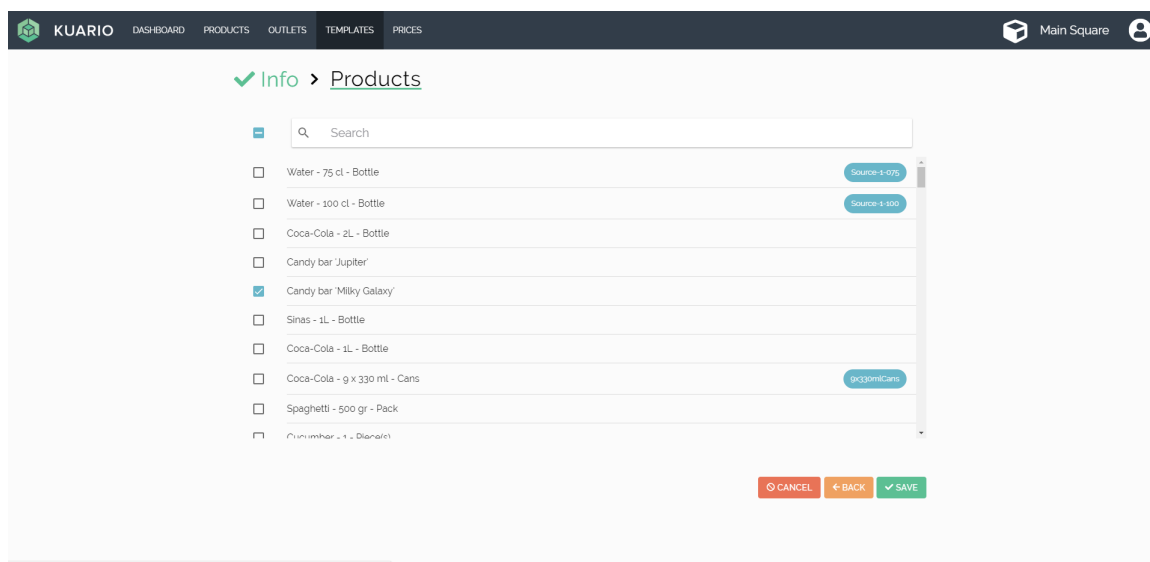
Pay Point

20. Click 'NEXT →'.



21. Tick the items that are to be sold in using this template.

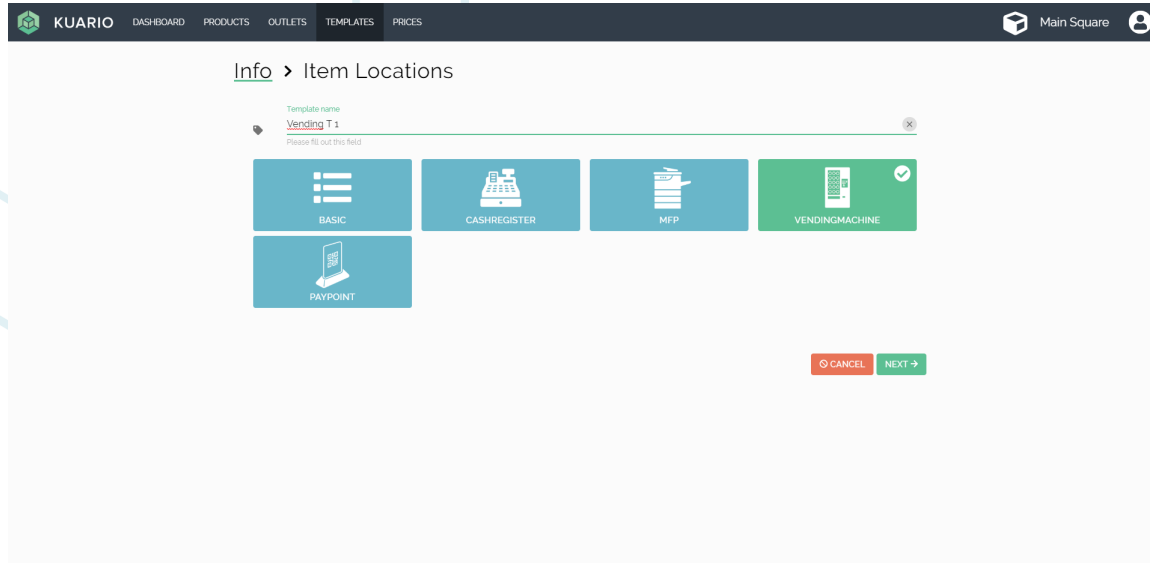
22. Click 'NEXT →'.



23. Click 'SAVE'.

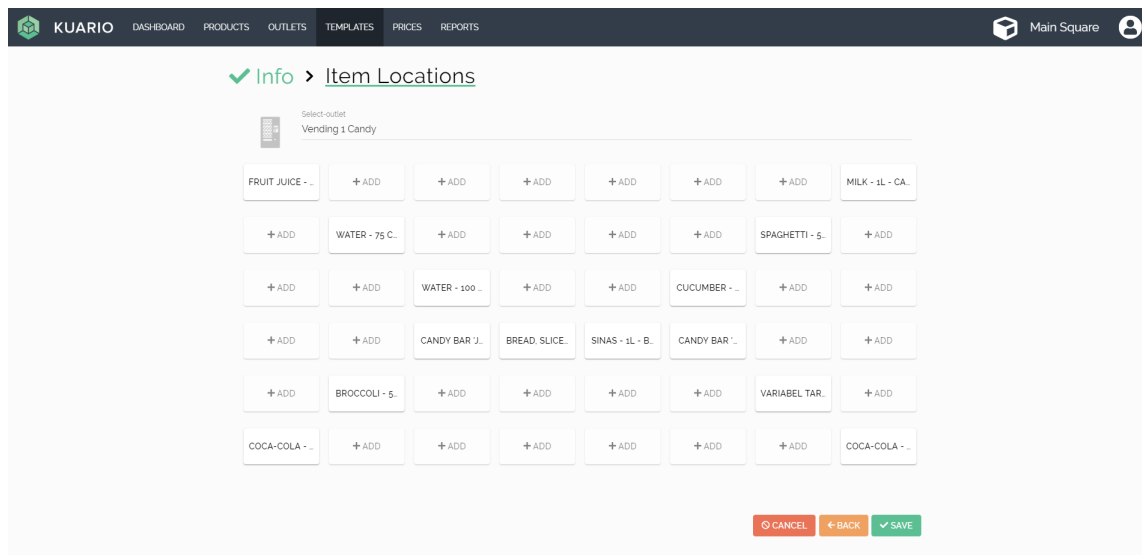
Vending Machine

24. Click 'NEXT →'.



25. Tick the items that are to be sold in using this template.

26. Click 'NEXT →'.



27. Click 'SAVE'.

Reports

Reports

Reports are documents that presents information in an organized format for a specific audience and purpose. The reports currently available in KUARIO are 'Turnover', 'Finances' and 'Clearing' that show the outcome of the activities on a Site.

Prerequisites:

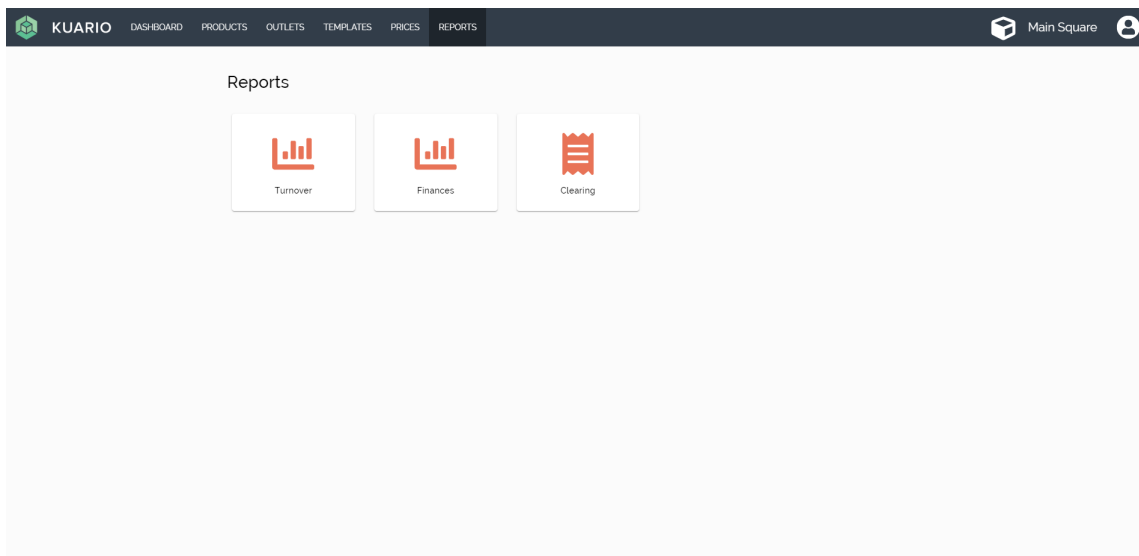
- Transactions made in the report period.

Where

- Main Menu\Reports

Reports

In this version of KUARIO three reports are available:



Turnover

The turnover report shows the turnover of the Outlets per product.

The screenshot shows the 'Turnover' report in the KUARIO system. The report is for the period from 01/01/2019 to 01/31/2019. It displays a table with columns for 'outlet', 'product', 'quantity', and 'amount'.

outlet	product	quantity	amount
Vending Machine (Stairs)	Inepro Screenwipe	2	1.00
Vending Machine (Stairs)	Inepro Mints	15	1.50
Vending Machine (Stairs)	Inepro Bottle/Can Opener	3	1.20
Vending Machine (Stairs)	Inepro Stress Cube	2	0.20
PayPoint	Direct Pay product	12	2.60
Kofee R&D	Espresso	229	2.29
Kofee R&D	Kofee	643	6.43
Kofee R&D	Ristretto	8	0.08
Kofee R&D	Americano	3	0.03
Kofee Sales	Espresso	101	1.01
Kofee Sales	Kofee	428	4.28
Kofee Sales	Ristretto	2	0.02

Finances

The finances report shows the Outlets per Payment Method.

outlet	paymentmethod	amount
Vending Machine (Stairs)	App	2,30
Vending Machine (Stairs)	RFID	0,20
PayPoint	App	1,60
Koffie R&D	App	0,73
Koffie R&D	RFID	0,89
Koffie Sales	App	0,25
Koffie Sales	RFID	2,54
Testkassa-01	Cash	1,32
Kassa 1 (opbouw)	App	0,00
Kassa 1 (opbouw)	RFID	0,00
Kassa 2 (opbouw)	RFID	0,00
Ricoh Inepro	App	0,34

Clearing

The clearing report shows the 'Mobile' and 'Debit & Credit-card' payments minus the 'Transaction costs' over a certain period in time.

Clearing summary	
Mobile	86.44
Debit & Credit-card	0.43
Transaction costs (4.75%)	4.13
Total	82.74

Select a clearing period you want to see:

[START - NOW](#)

transactions			
time	description	📱	💳
January 31, 2019 4:03 PM	Koffie Sales-inepro intern	0.01	0.00
January 31, 2019 3:47 PM	Koffie R&D-inepro intern	0.00	0.00
January 31, 2019 3:45 PM	Koffie R&D-inepro intern	0.00	0.00
January 31, 2019 3:27 PM	Koffie R&D-inepro intern	0.00	0.00
January 31, 2019 3:26 PM	Koffie R&D-inepro intern	0.00	0.00
January 31, 2019 2:49 PM	Koffie Sales-inepro intern	0.01	0.00
January 31, 2019 2:35 PM	Koffie Sales-inepro intern	0.00	0.00
January 31, 2019 2:31 PM	Koffie R&D-inepro intern	0.00	0.00
January 31, 2019 2:31 PM	Koffie R&D-inepro intern	0.00	0.00
January 31, 2019 2:29 PM	Koffie R&D-inepro intern	0.00	0.00
January 31, 2019 2:25 PM	Koffie R&D-inepro intern	0.00	0.00
January 31, 2019 2:17 PM	Koffie R&D-inepro intern	0.00	0.00

Memberships

Memberships

Memberships are groups that a user can be a member of and that may give that user extra rights or options.

Memberships can be used to grant exclusive access to an Outlet, provide a deduction of the product price or make it possible for the members to use KUARIO as payment source, or lastly to use invoices in stead of direct payments.

i Note: To let KUARIO to be used as an external payment source for a third-party application you will need KUARIO Gateway.


Prerequisites:

- None.

Where

- Main Menu\Memberships

Add Membership

1. Add a Membership, click  ('+ Add').

Memberships

 + ADD

 INVITE LINKED ID'S

 Search

- Name the Membership.
- Check the box if you want to allow invoicing (by default it should remain unchecked as you would not want to allow invoicing).

Note: With invoicing your users will not pay directly, rather their transactions are stored and the Merchant will be responsible to charge these costs to the user.

- If the members may enjoy a generic (over all available products) deduction you can enter the deduction percentage here.
- Click 'NEXT →'.

- KUARIO Email message, select the language for our default message. Or create your custom message yourself.
- Click 'NEXT →'.

Enter Users directly in the KUARIO Manager

8. Add members to your membership by adding the email address that they also use for their KUARIO Account. Confirm with the '+' Plus or 'Add item' button

i Note: When you are using a KUARIO Gateway the check box 'Gateway' should be ticked and the user must get a unique external identifier, namely the external application's user identifier of this user.

i Note: Refer to the KUARIO Gateway manual for your application for more information about this.

Info > E-Mail > Memberships (Total: 1 | Accepted: 0)

Our Group

IMPORT CSV DOWNLOAD CSV TEMPLATE

Search

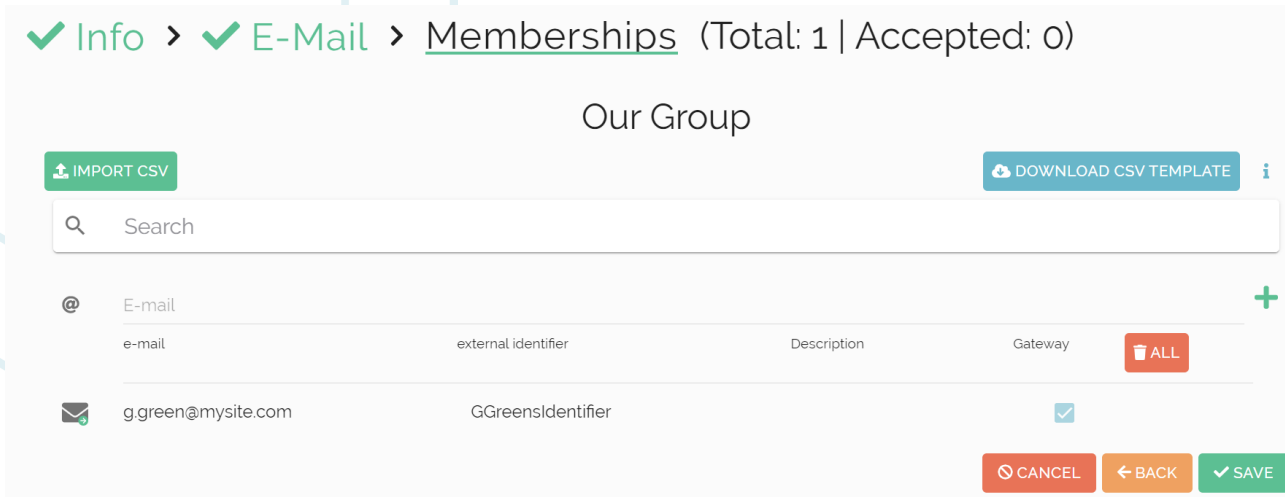
@	E-mail	external identifier	Description	Gateway	
	e-mail				ALL
	g.green@mysite.com	GGreensIdentifier		<input checked="" type="checkbox"/>	

CANCEL BACK SAVE

9. Another method to insert members is the *.csv import method, explained in the next section.

Import via CSV

10. Click the 'Import CSV' button.



To Import a CSV file via the manager it should be formatted like this:

```
email;externalIdentifier;externalIdentifierDescription;addExternalIdentifier;mutation;
  startDateTime(yyyy-mm-ddThh:mm);endDateTime(yyyy-mm-ddThh:mm);status
g.green@mysite.com;Gerald Green;name;1;add;2021-01-01T00:01;2030-12-31T23:59;active
```

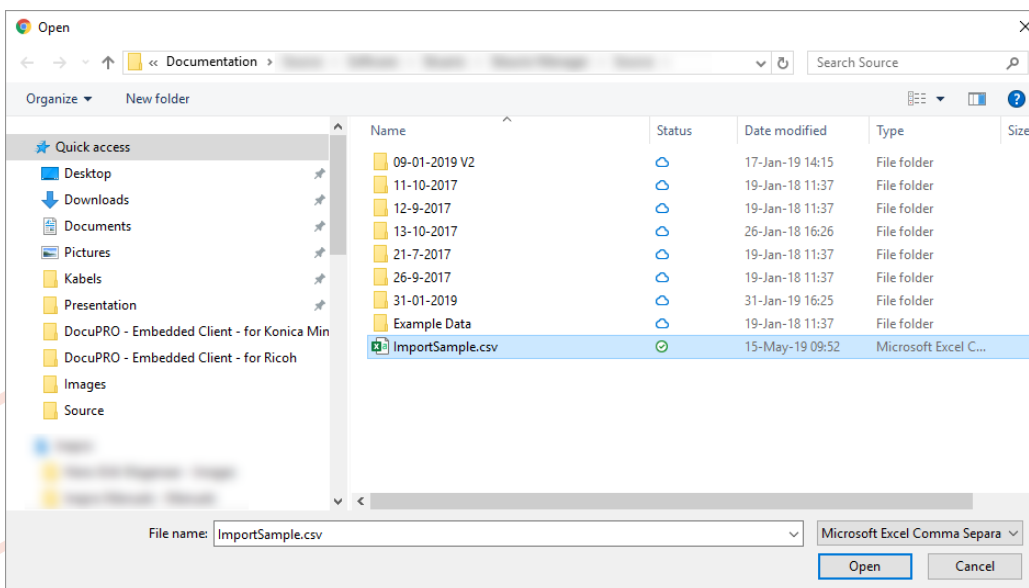
email	externalIdentifier	externalIdentifierDescription	addExternalIdentifier	mutation	startDateTime	endDateTime	status
example@kuario.com	identifier	description	1 or 0	add or del	yyyy-mm-ddThh:mm	yyyy-mm-ddThh:mm	active or pending or blocked
g.green@mysite.com	Gerald Green	name	1	add or del	2021-01-01T00:01	2030-12-31T23:59	active

11. The example above creates a member identified with email address 'g.green@mysite.com', with an external identifier 'Gerald Green' and a membership description 'name'. The member with ExternalIdentifier "gerald green" is allowed to use KUARIO Gateway, because 'addExternalIdentifier' is set to 1. Mutation must be filled with "add" or with "del". "add" adds the user to the membership. "del" removes a user from the membership. A deleted user can also no longer use the KUARIO Gateway.

Note: When a user is added with the "addExternalIdentifier" status = 0, this user cannot use the KUARIO gateway, but is granted the privileges associated with the membership.

Note: Refer to the KUARIO Gateway manual for your application for more information about this.

12. Select your CSV file and click 'Open'.



13. The members should now be added to your membership.

Completing creating a new Membership

14. When you have added the members, it is possible to also add external identifier. An external identifier can be used to create a subgroup of users in you membership. In the example below two groups are created one has the external ID '50', the other group has the ID '150'. These ID's combined with the membership ID may be exported to external administrative systems, showing the usage of certain groups without showing their email addresses, thus complying to privacy concerns.

Note: This usage of the external identifier for grouping can not be used if you are also using a Gateway. In those cases the external identifier must be used to link to external User ID.

✓ Info > ✓ E-Mail > Memberships (Total: 20 | Accepted: 0)

Our Group

IMPORT CSV DOWNLOAD CSV TEMPLATE

Search

@	E-mail	external identifier	Description	Gateway	
	e-mail	external identifier	Description	Gateway	ALL
	g.green@mysite.com	GGreensIdentifier		<input checked="" type="checkbox"/>	
	aarcher@bestmailclient.com	150	Alberto Archer is a male f	<input type="checkbox"/>	
	bbailey@bestmailclient.com	150	Beryl Bailey is a female fr	<input type="checkbox"/>	
	ccarter@bestmailclient.com	150	Chris Carter is a male for	<input type="checkbox"/>	
	onaylor@bestmailclient.com	50	Oscar Naylor is a male fr	<input type="checkbox"/>	
	pproctor@bestmailclient.com	50	Patty Proctor is a female	<input type="checkbox"/>	
	rredman@bestmailclient.com	50	Rafael Redman is a male	<input type="checkbox"/>	
	ssawyer@bestmailclient.com	50	Sandy Sawyer is a female	<input type="checkbox"/>	
	ttrinder@bestmailclient.com	50	Tony Trinder is a male fro	<input type="checkbox"/>	

CANCEL BACK SAVE

15. When a *.csv is imported using the startDateTime(yyyy-mm-ddThh:mm), endDateTime(yyyy-mm-ddThh:mm) or status field, then these fields can also be edited for other members..

16. Tick the check box if you are using KUARIO Gateway, in this case the external identifier must be exactly the same as the user's ID in the external system connected with KUARIO Gateway.

Our Group

IMPORT CSV

DOWNLOAD CSV TEMPLATE



Search

@	E-mail	external identifier	Description	Gateway	Valid from	Valid till	status	
	k.dgraaf@inepro.com	KoosHisExternalld	Description	✓	-	-	Active	ALL
	aarcher@bestmailclient...	AlAr002002	Alberto Archer is a	✓	01-05-2021 00:01	01-05-2025 00:01	Active	
	bbaily@bestmailclient...	BeBa002003	Beryl Bailey is a fe	✓	01-05-2021 00:01	01-05-2025 00:01	Active	
	ccarter@bestmailclient...	ChCa002004	Chris Carter is a m	✓	01-05-2021 00:01	01-05-2025 00:01	Active	
	dcarver@bestmailclient...	DeCa002005	Debby Carver is a	✓	01-05-2021 00:01	01-05-2025 00:01	Active	
	echaplin@bestmailclie...	ErCh002006	Ernesto Chaplin is	✓	01-05-2021 00:01	01-05-2025 00:01	Active	
	fchandler@bestmailclie...	FlCh002007	Florence Chandler	✓	01-05-2021 00:01	01-05-2025 00:01	Active	
	gcooper@bestmailclie...	GoCo002008	Gordon Cooper is	✓	01-05-2021 00:01	01-05-2025 00:01	Active	
	hfletcher@bestmailclie...	HeFl002009	Helene Fletcher is	✓	01-05-2021 00:01	01-05-2025 00:01	Active	

CANCEL

← BACK

✓ SAVE

17. When you need to edit the member period, the member period dialogue will show. Here the start and end of a period can be determined.

Change member times

close

E-mail

aarcher@bestmailclient.com

From date

01-May-202 00:01

DISABLE START TIME

Till date

01-May-202 00:00

DISABLE END TIME

CANCEL UPDATE

18. Click 'SAVE' to save the Membership.











KUARIO DASHBOARD PRODUCTS OUTLETS TEMPLATES PRICES REPORTS MEMBERSHIPS Main Square

Info > Terminals > Extra

Outlet name
Canteen - Snack Corner - 1

Please fill out this field

Is this outlet active?

 CASH REGISTER <input checked="" type="checkbox"/>	 MFP	 VENDING MACHINE	 PAY POINT
 LINK TERMINAL	 TIMER	 COIN VALIDATOR	 GATEWAY
 OPERATED PAYPOINT			 ACCESS

Is this outlet private?

CANCEL NEXT

Set exclusive access to an Outlet

19. Go to Outlets.

20. Select an Outlet that you want the Membership to have exclusive access to.

21. Tick the box 'Is this Outlet private?'. A pop-up selection list will appear.

22. Select the appropriate Membership(s) from that list.

23. Make sure the box is checked, click 'NEXT →'.

Info > Terminals > Extra

Outlet name
Canteen - Snack Corner - 1

Please fill out this field

Is this outlet active?

CASH REGISTER

MFP

VENDING MACHINE

PAY POINT

LINK TERMINAL

TIMER

COINVALIDATOR

GATEWAY

OPERATED PAYPOINT

ACCESS

Is this outlet private?

[blurred]

[blurred]

Our Group

NEXT →

24. Click 'NEXT →'.

PRODUCTS OUTLETS **TEMPLATES** PRICES REPORTS MEMBERSHIPS

Info > Terminals > Extra


order-terminal

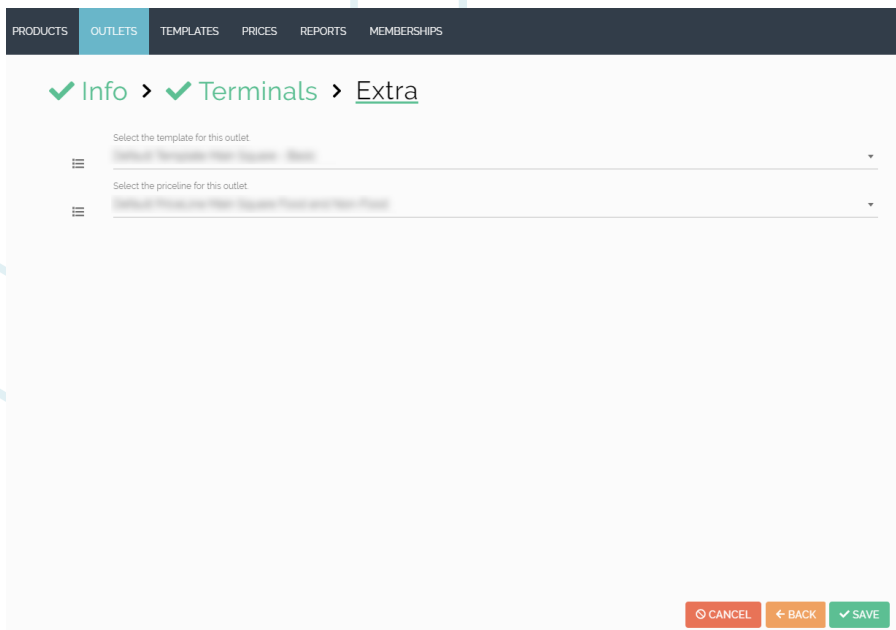
Device address
[blurred]

Please fill out this field

Device name
[blurred]

CANCEL BACK NEXT →

25. Click '  ' to save the Outlet Settings.






PRODUCTS OUTLETS TEMPLATES PRICES REPORTS MEMBERSHIPS

✓ Info > ✓ Terminals > Extra

Select the template for this outlet

Select the priceline for this outlet

26. The Outlet can now only be used by members of the Membership(s) you selected for it. Other users cannot use it.

