LOYVERSE

Loyverse POS user guide

English · November 2026

help.loyverse.com

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Getting Started

How to Get Started with Loyverse POS

Video
https://www.youtube.com/watch?v=1DTOHb2-gto

To begin using Loyverse POS, follow these steps to download, install, and set up the app on your device.

1. Download and Installation

You can download the Loyverse POS app from:

- **Google Play Store** (for Android devices)
- **Apple App Store** (for iOS devices)

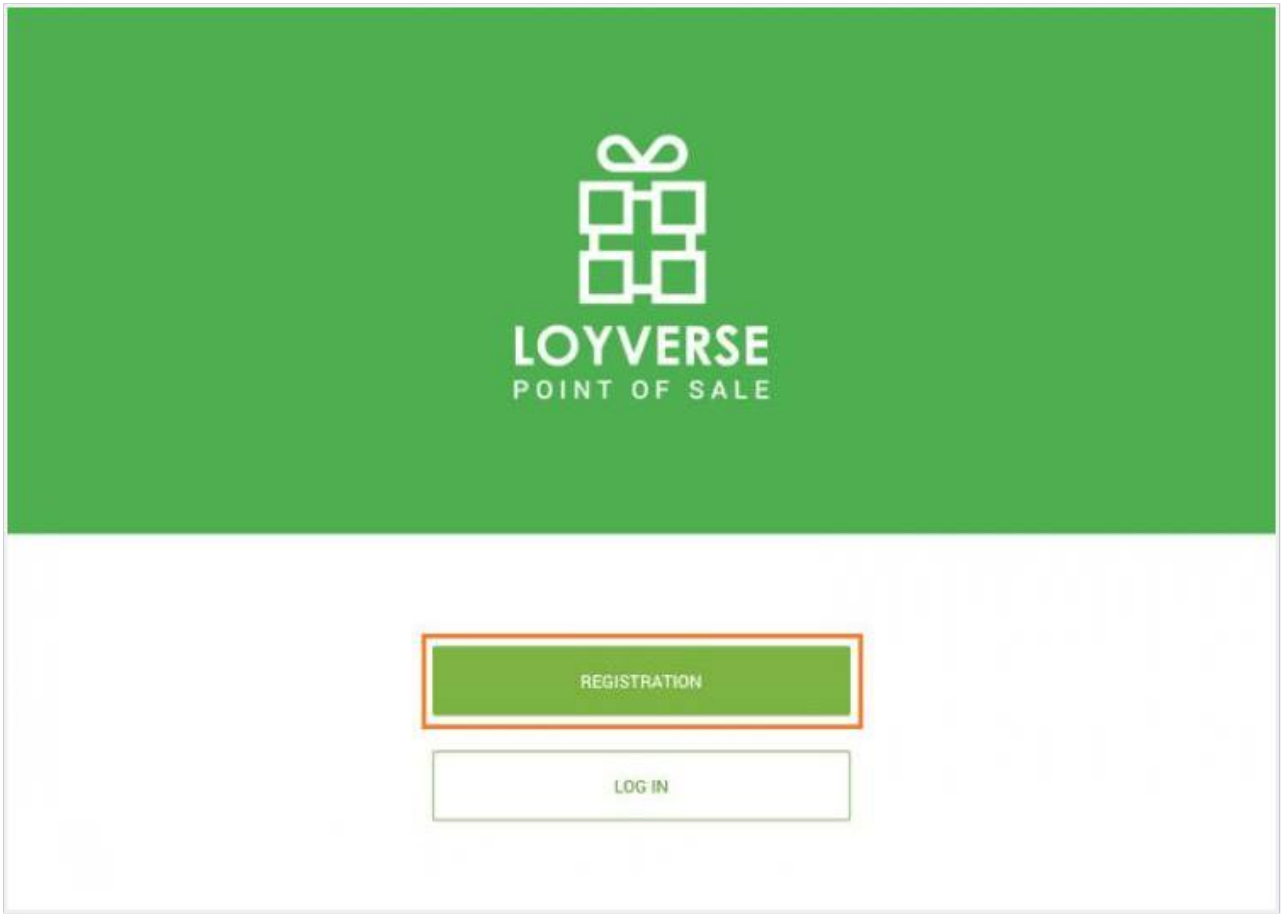
System Requirements:

- Android **7.0 or higher**
- iOS **15.0 or higher**

Note:
The Loyverse POS app is suitable for a wide range of businesses—retail stores, grocery shops, boutiques, restaurants, cafés, bars, and more. The system offers flexible settings in the Back Office, allowing you to tailor the POS to your business needs.

2. Launching the App

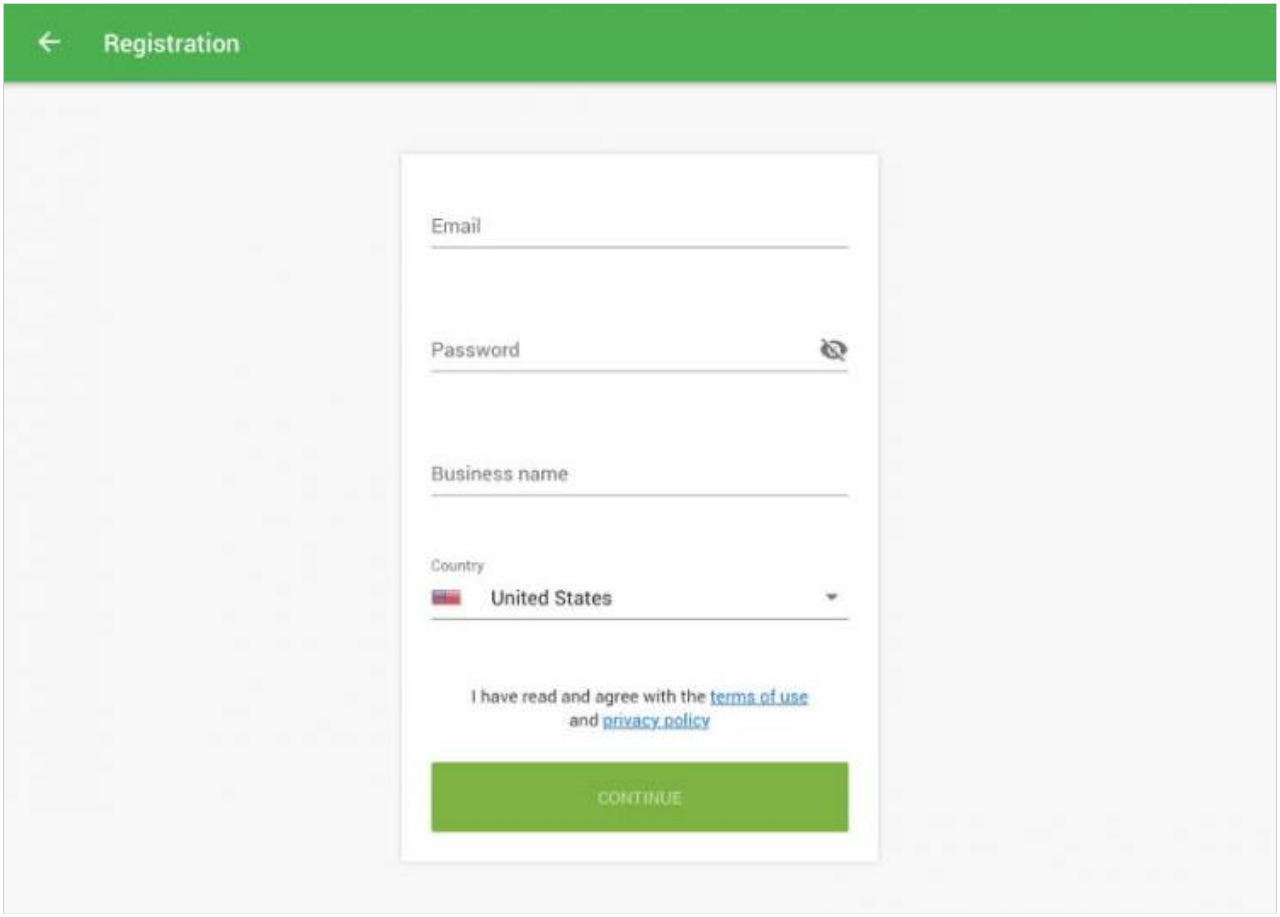
After installation, open the Loyverse POS app. You will see the **Welcome** screen.



If you don’t yet have an account, tap the ‘**Registration**’ button to create one.

3. Creating an Account

Fill in the simple registration form with your details.

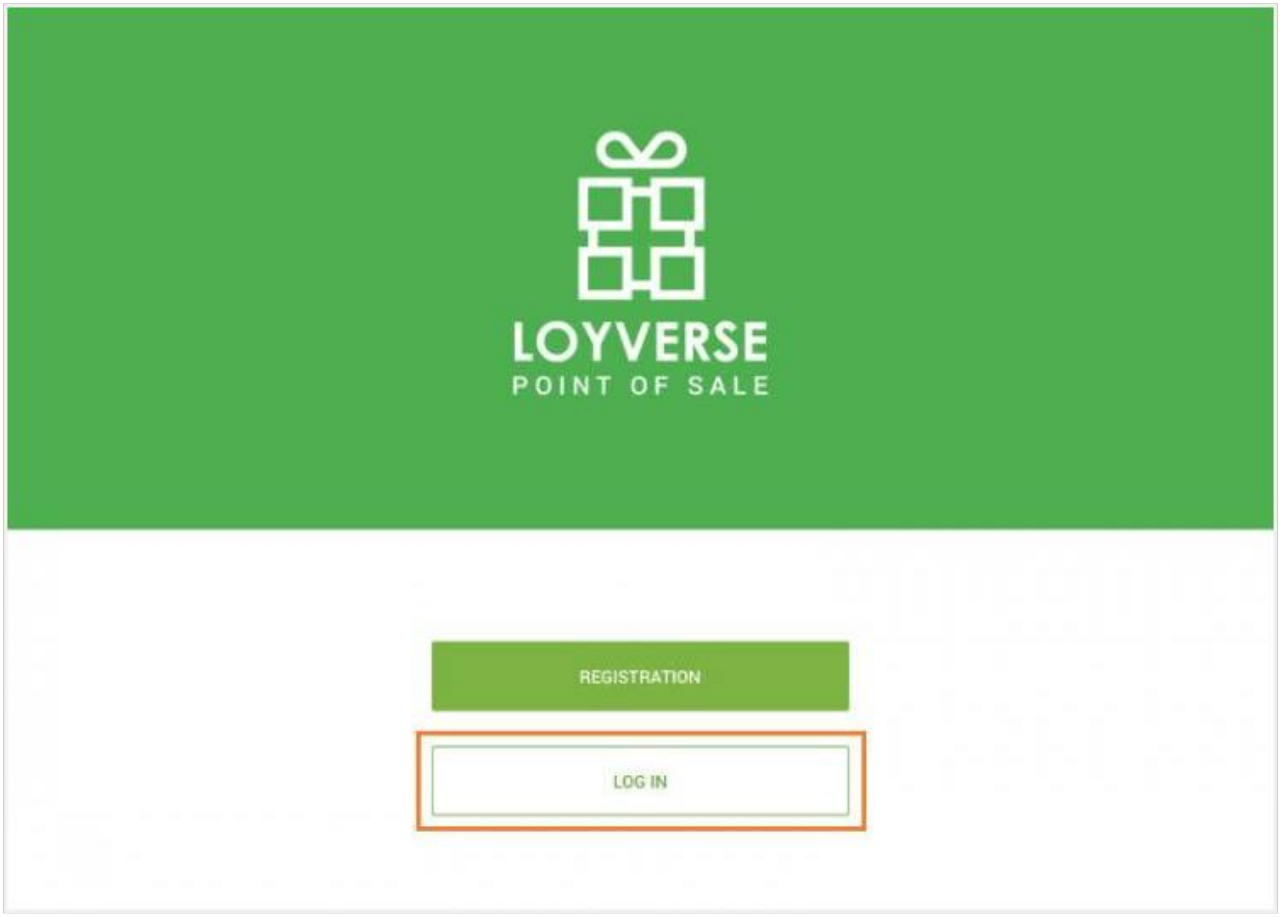


After submitting the form, check your email inbox. You will receive a message from Loyverse.

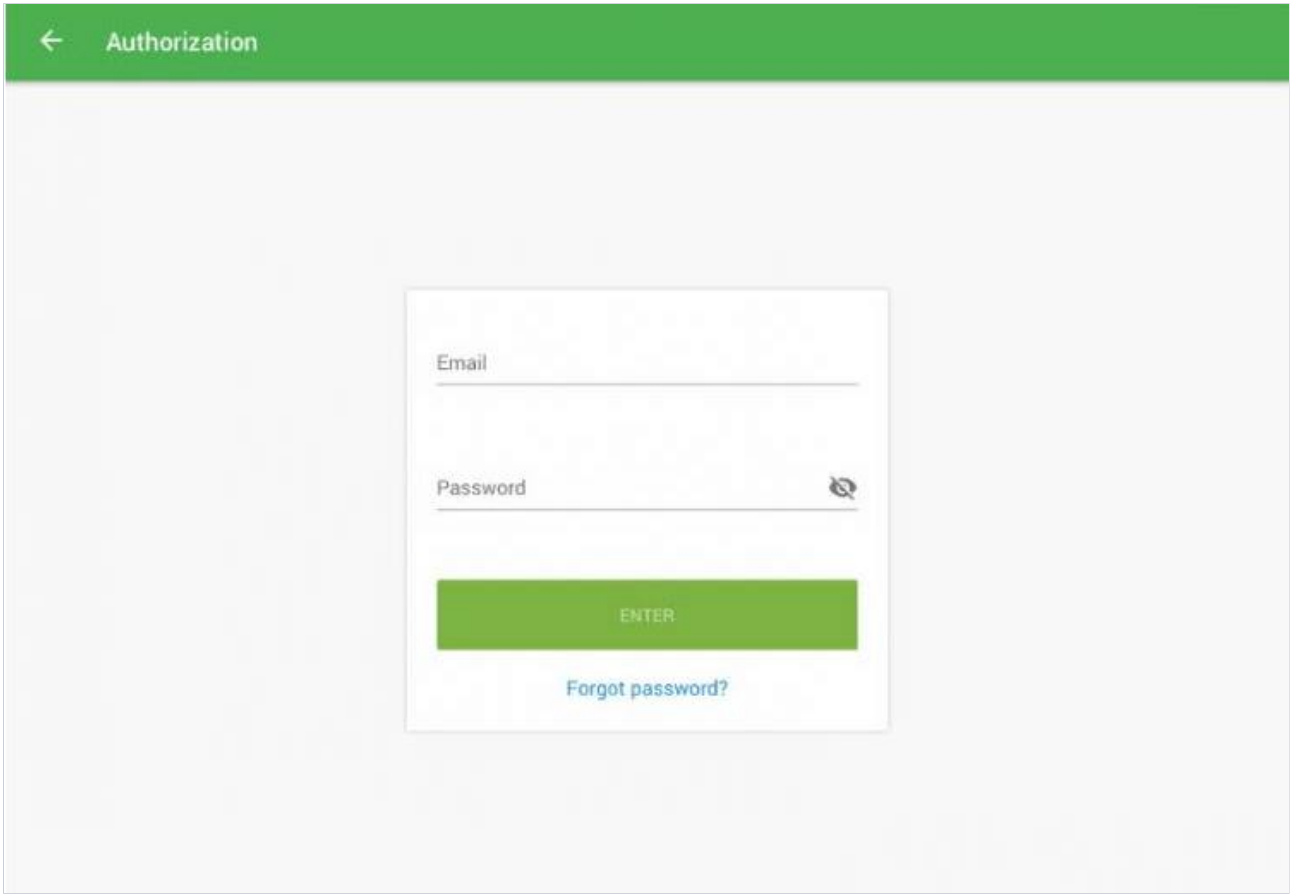
Open the email and click the confirmation link to verify your email address.

4. Logging In

Once your email is confirmed, return to the app and tap '**Login**.'



- Enter the email address you registered with.
- Enter your password.
- Tap the '**Enter**' button.



You are now successfully logged in to Loyverse POS!

Continue learning:

Setting Up Your Shop in Loyverse Back Office

How to Add Items and Categories in Loyverse POS

How to Make Sales

How to Cancel Receipts

Setting Up Your Shop in Loyverse Back Office

Video
https://www.youtube.com/watch?v=9qjbzzXEaK8

Your Loyverse Back Office is the web-based control center that syncs seamlessly with your Loyverse POS app(Play Market or App Store). Follow these steps to configure your shop and get up and running quickly.

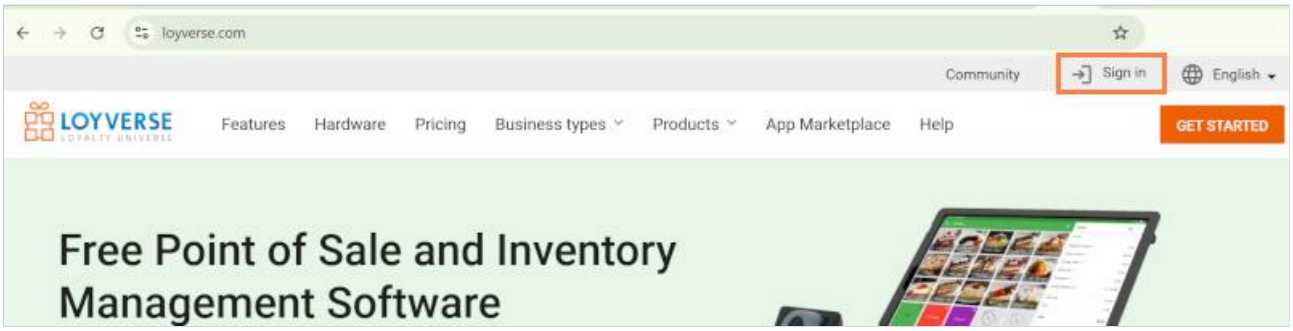
1. Recommended Browser

For the best experience, use **Google Chrome** when accessing the Back Office.

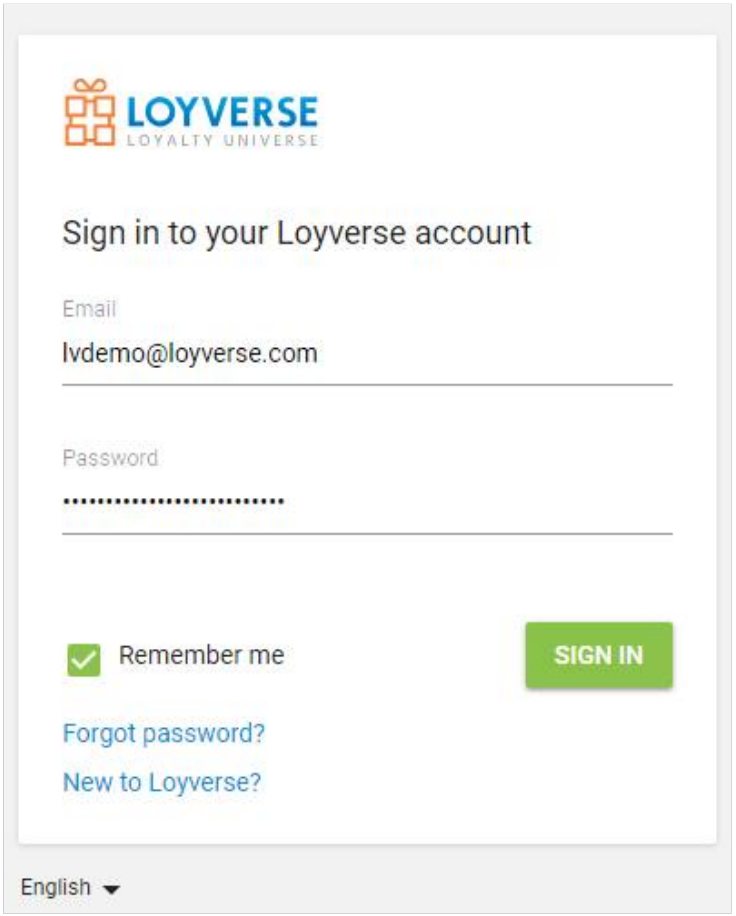
2. Log In to Back Office

Go to the Loyverse website.

Click **SIGN IN** in the top-right corner.



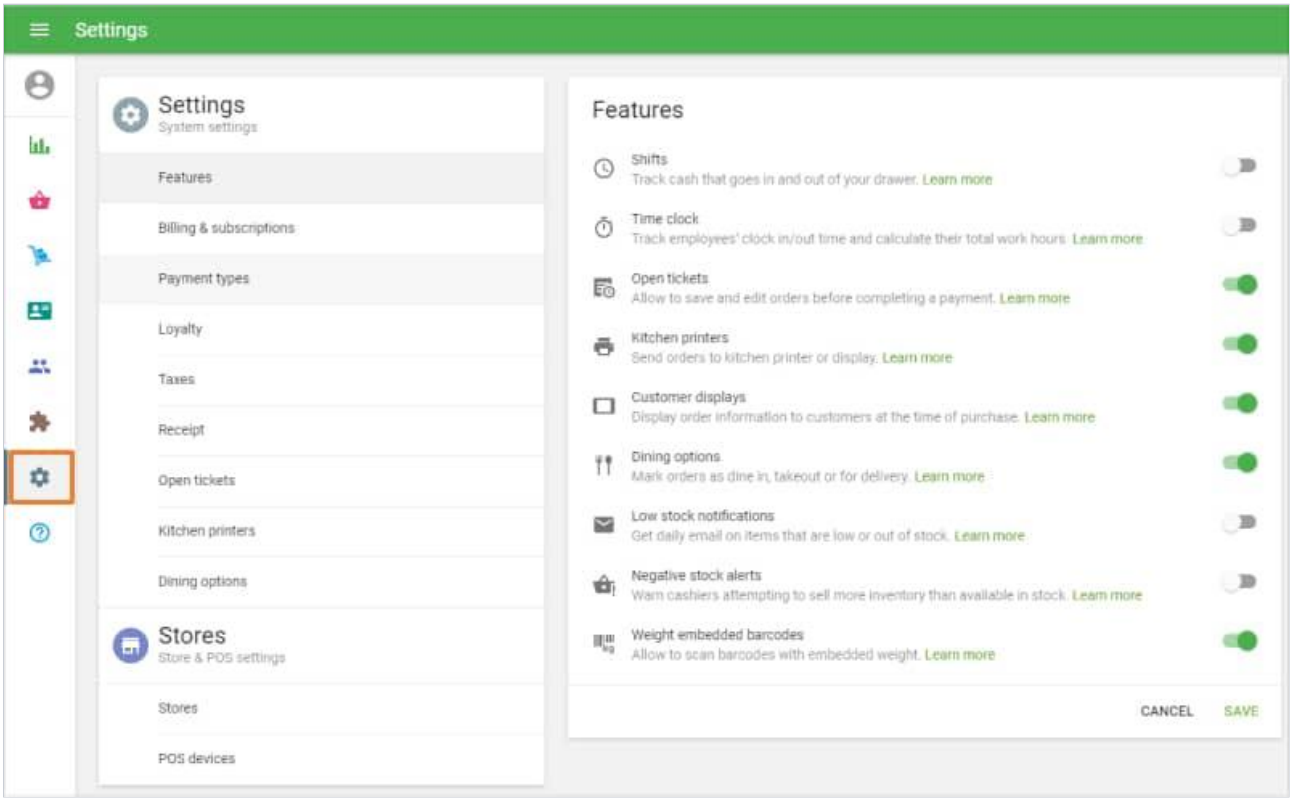
Enter the email and password you registered with.



3. Access System Settings

In the left-hand menu, click the **Settings** (⚙) icon.

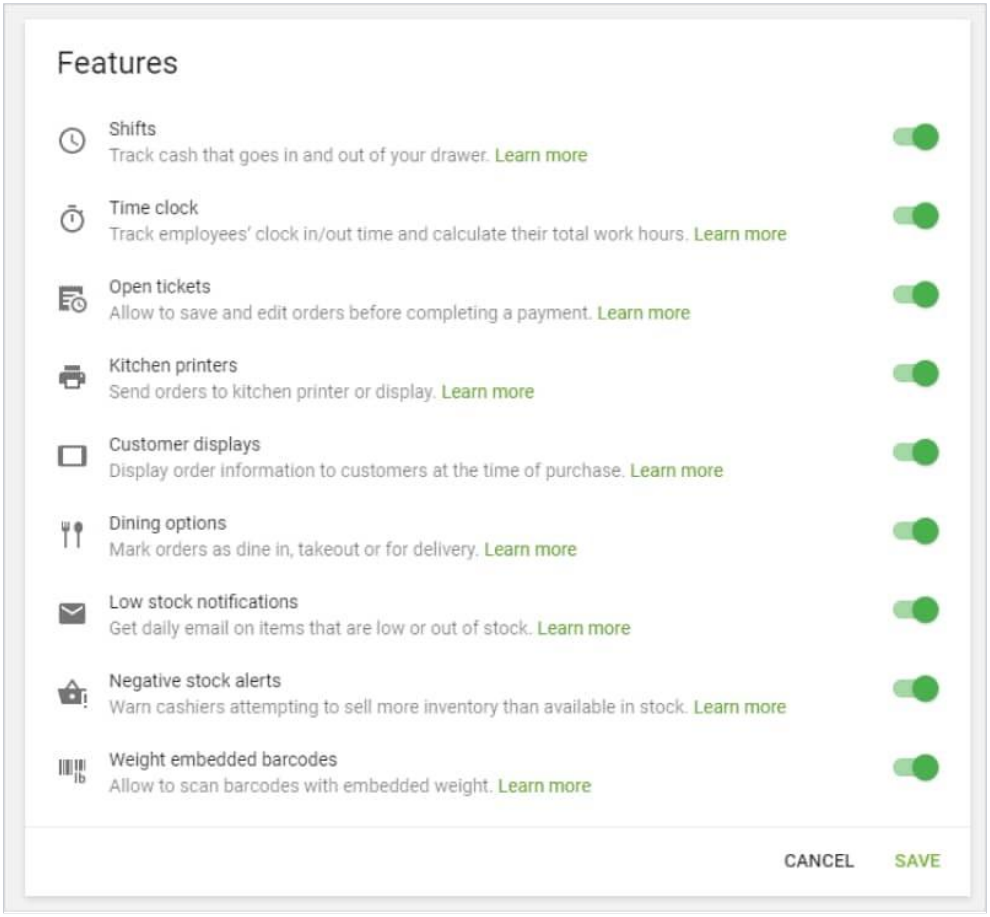
Under **System settings**, select **Features**.



4. Enable Key Features

In the **Features** section, toggle on any options you need for your business:

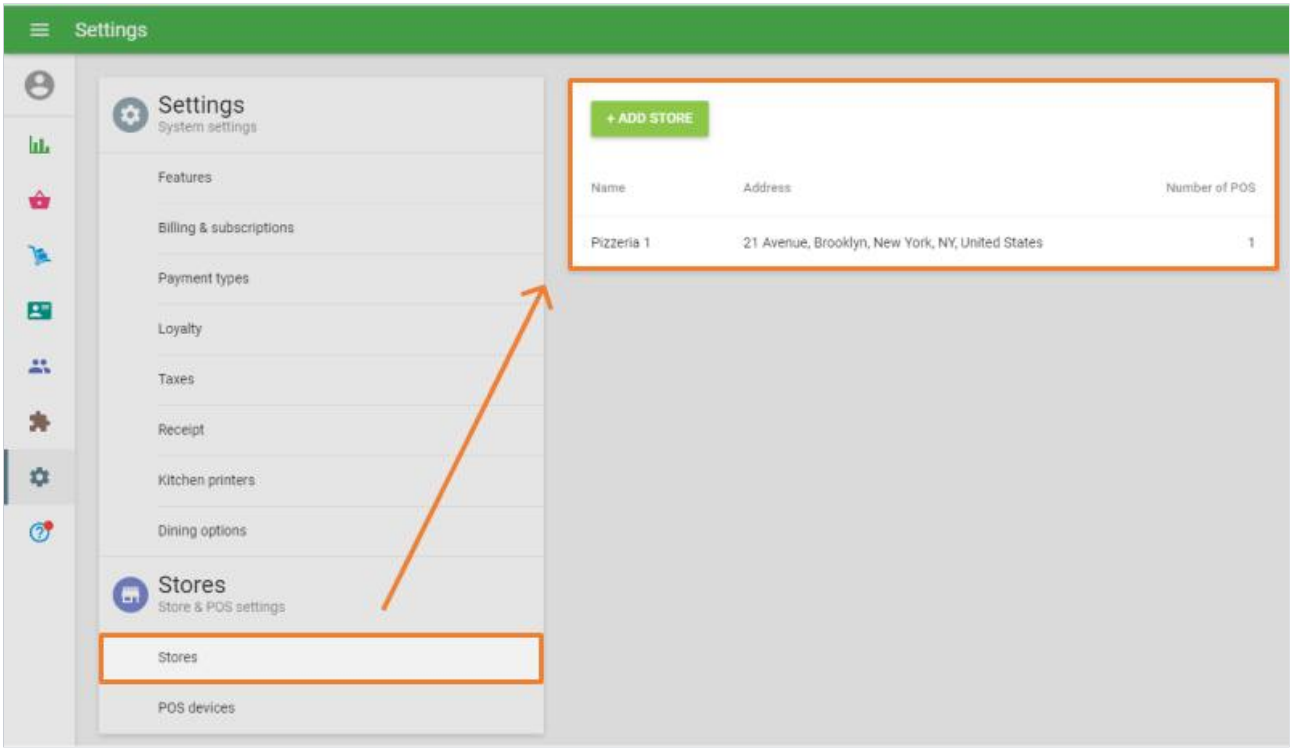
- Shifts
- Time clock
- Open tickets
- Kitchen printers
- Customer displays
- Dining options
- Low stock notifications
- Negative stock alerts
- Weight-embedded barcodes



Once you've selected your features, click **Save**.

5. Configure Store Information

In the Settings menu, select **Stores**.



Click **Add Store** (or select an existing one) and fill in:

- Store name
- Address
- Phone
- VAT number
- Description

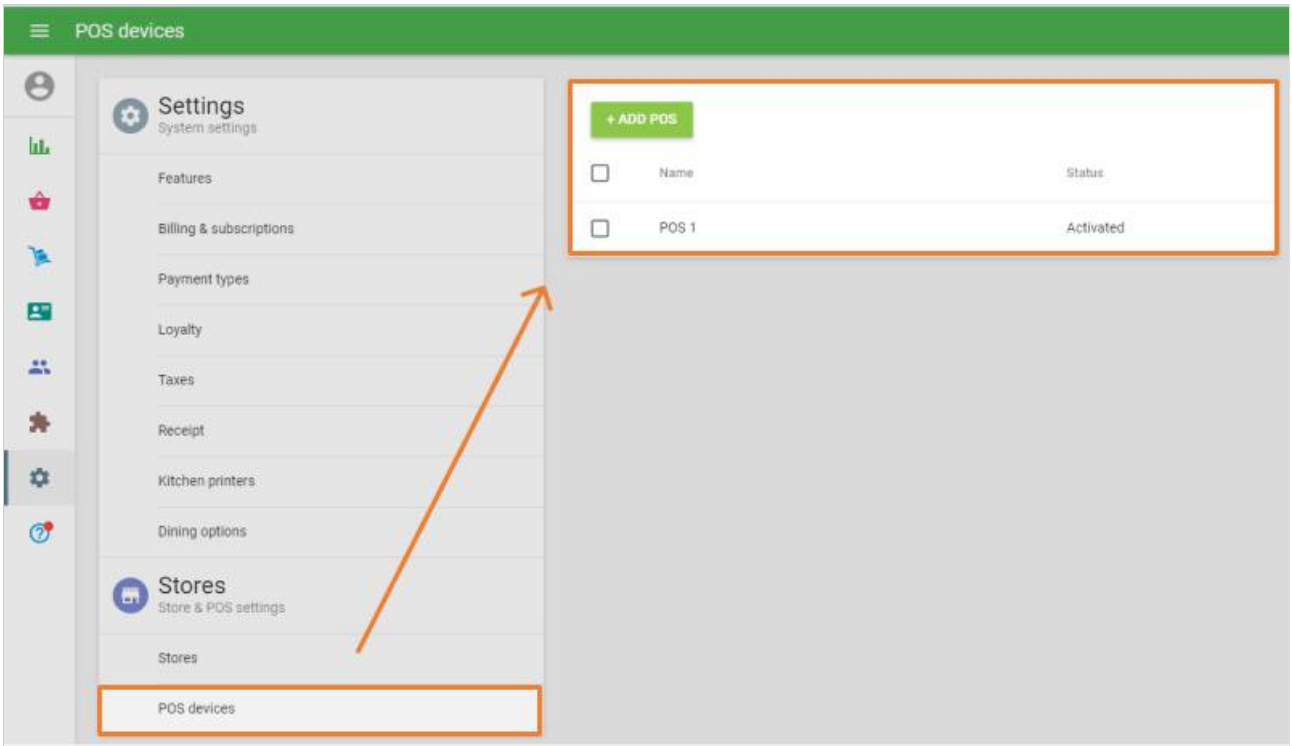
This information will appear on the store receipts.

Click **Save**.

Tip: If you operate multiple locations, repeat this step for each store.

6. Add POS Devices

Under **Stores**, choose **POS Devices**.



Click **Add POS**.

Enter a name for the register (e.g., “Front Counter”) and assign it to the appropriate store.

Click **Save**.

Note: Each POS you add here will be available to connect in your Loyverse POS app.

7. Next Steps in the POS App

With your Back Office setup complete, switch to the Loyverse POS app to:

- **Add items** and categories
- **Start selling** to customers

Your Back Office and POS app work together in real time—any changes you make online will appear instantly on your devices. Enjoy managing your shop more efficiently with Loyverse!

See also:

How to Manage Account Settings in the Back Office

How to Add Logo to the Receipts

How to Change/Recover Your Password for the Back Office

How to Exit from Back Office

How to Sign out from Loyverse POS

How to Set the Currency

How to Cancel Receipts

How to Add Items and Categories in Loyverse POS



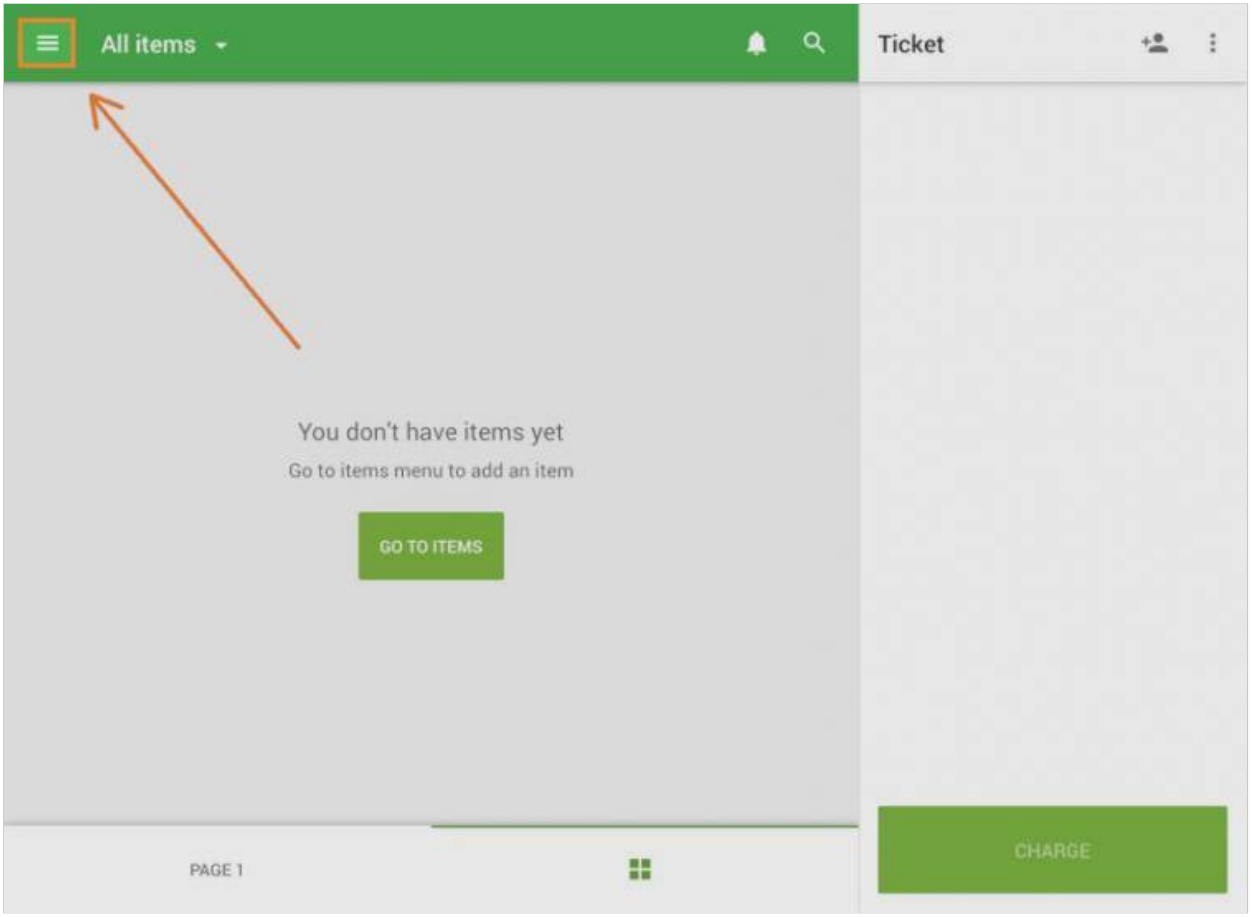
Video
https://www.youtube.com/watch?v=0DbQ7G---yc

Organize your inventory by adding items and grouping them into categories—all from your smartphone or tablet. Follow these simple steps to get started.

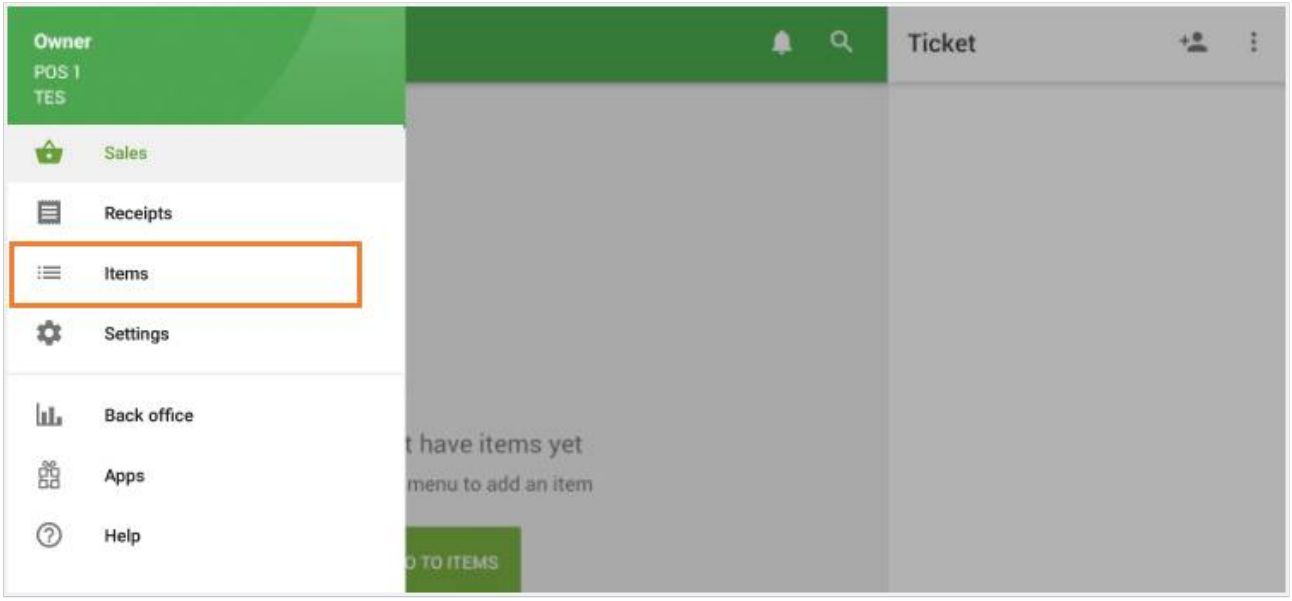
1. Open the Items Menu

Log in to the Loyverse POS app.

Tap the ☰ **Menu** icon in the top-left corner.

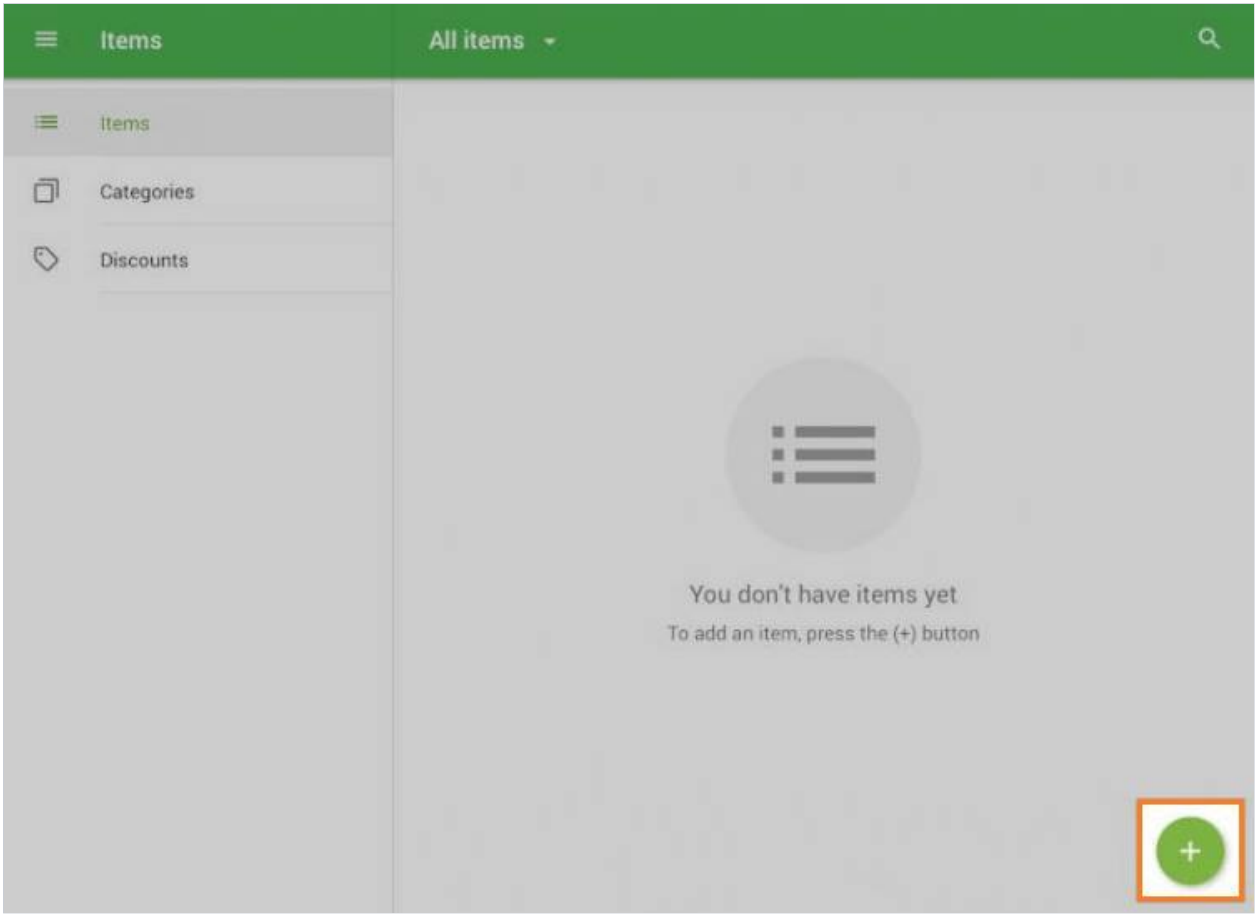


Select **Items.**



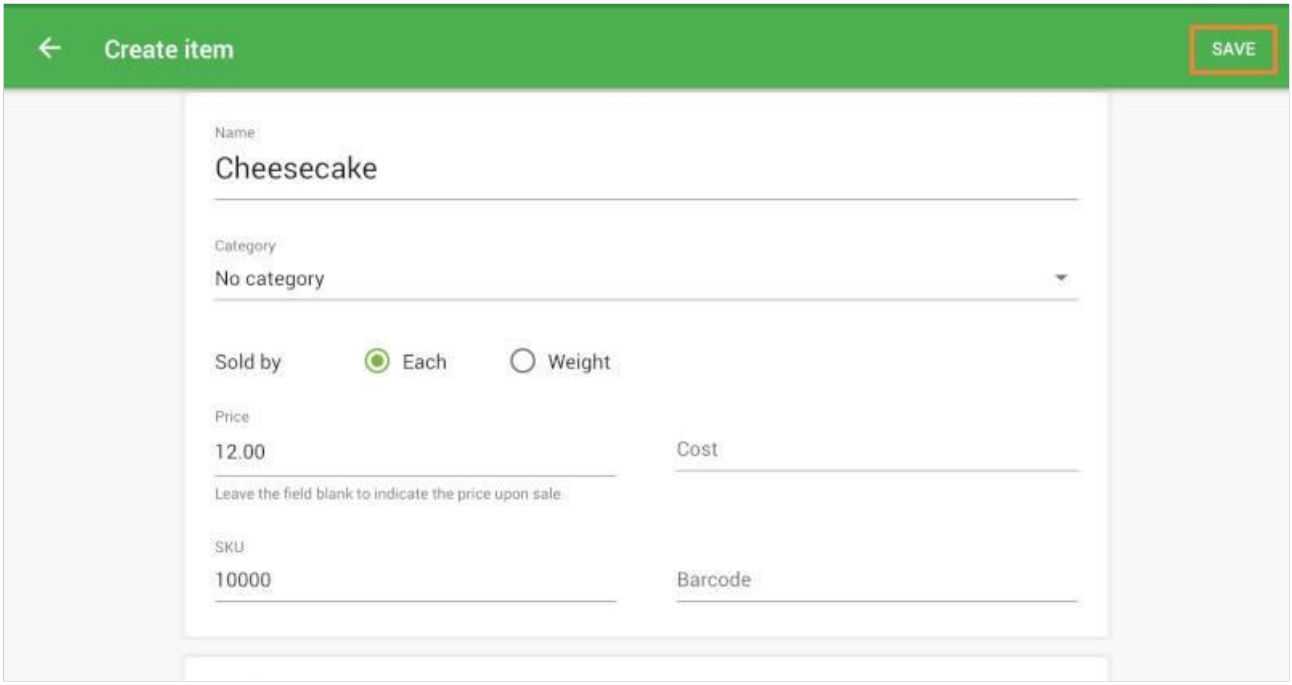
2. Add a New Item

In the **Items** screen, tap the ⊕ **Add** button (bottom-right).



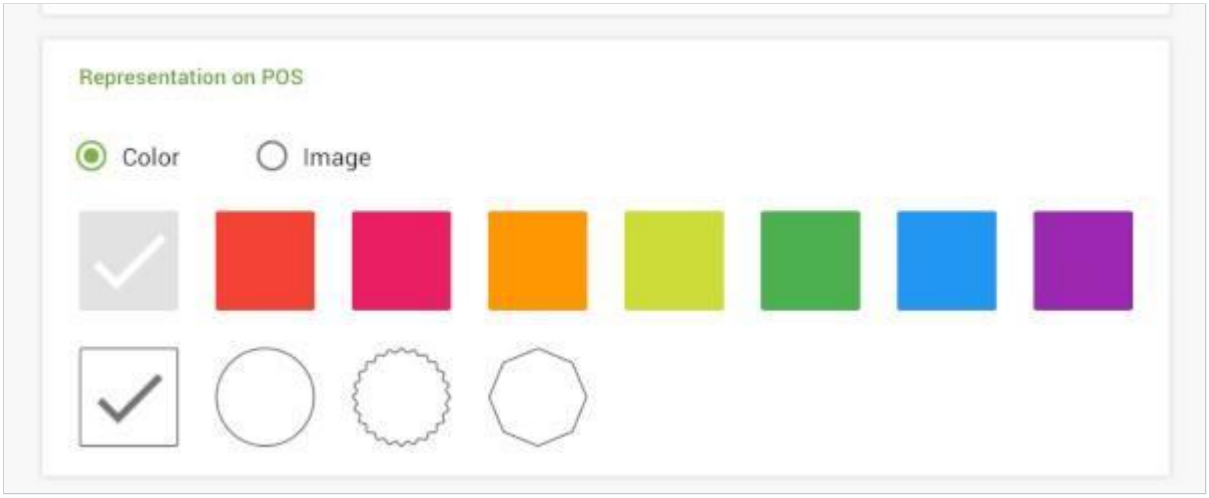
On the **Create Item** page, enter:

- Item **Name**
- **Price**
- **Category** (select an existing category, create a category, or leave blank to add later)
- **SKU** and **Barcode**



Customize the item's appearance:

- Icon **Color and shape**
- **Image**—take a new photo or upload one from your gallery

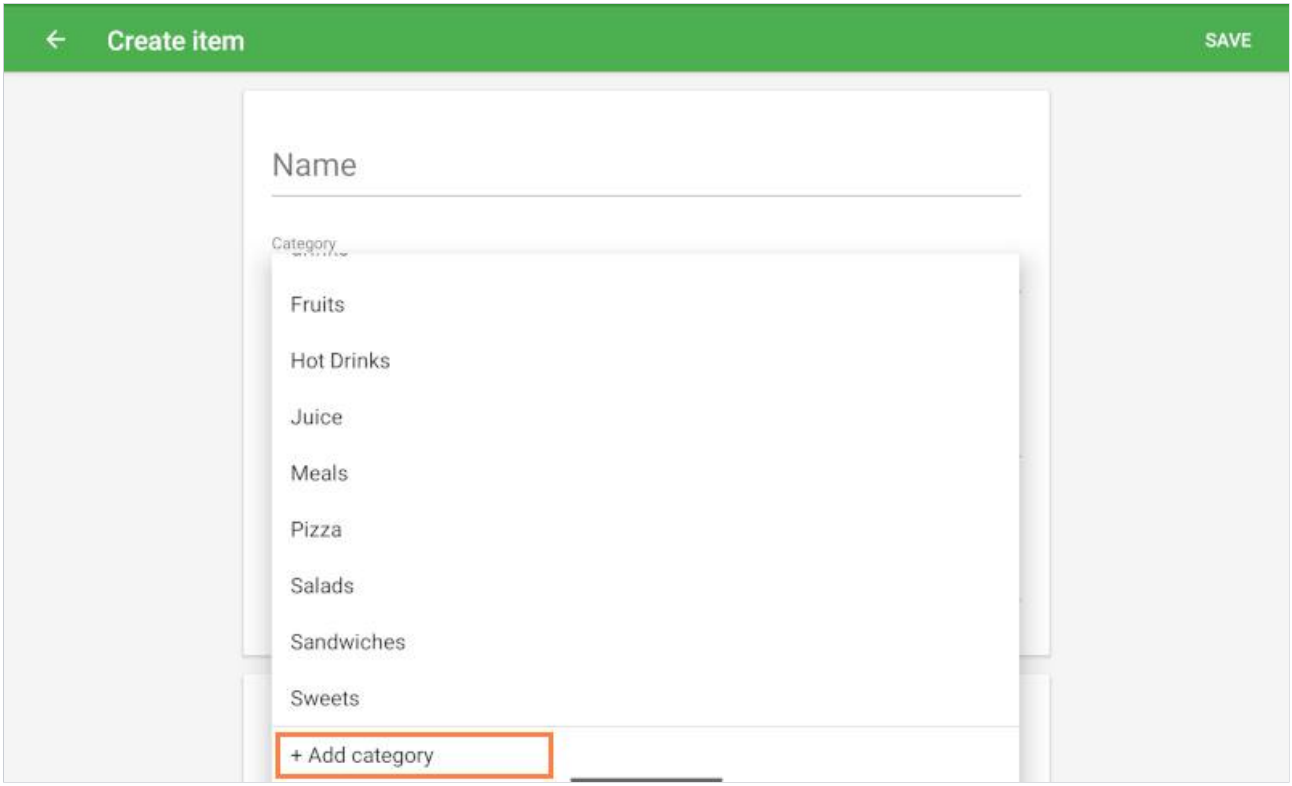


Tap **Save** to add the item to your inventory.

3. Create or Manage Categories

A. While Adding an Item

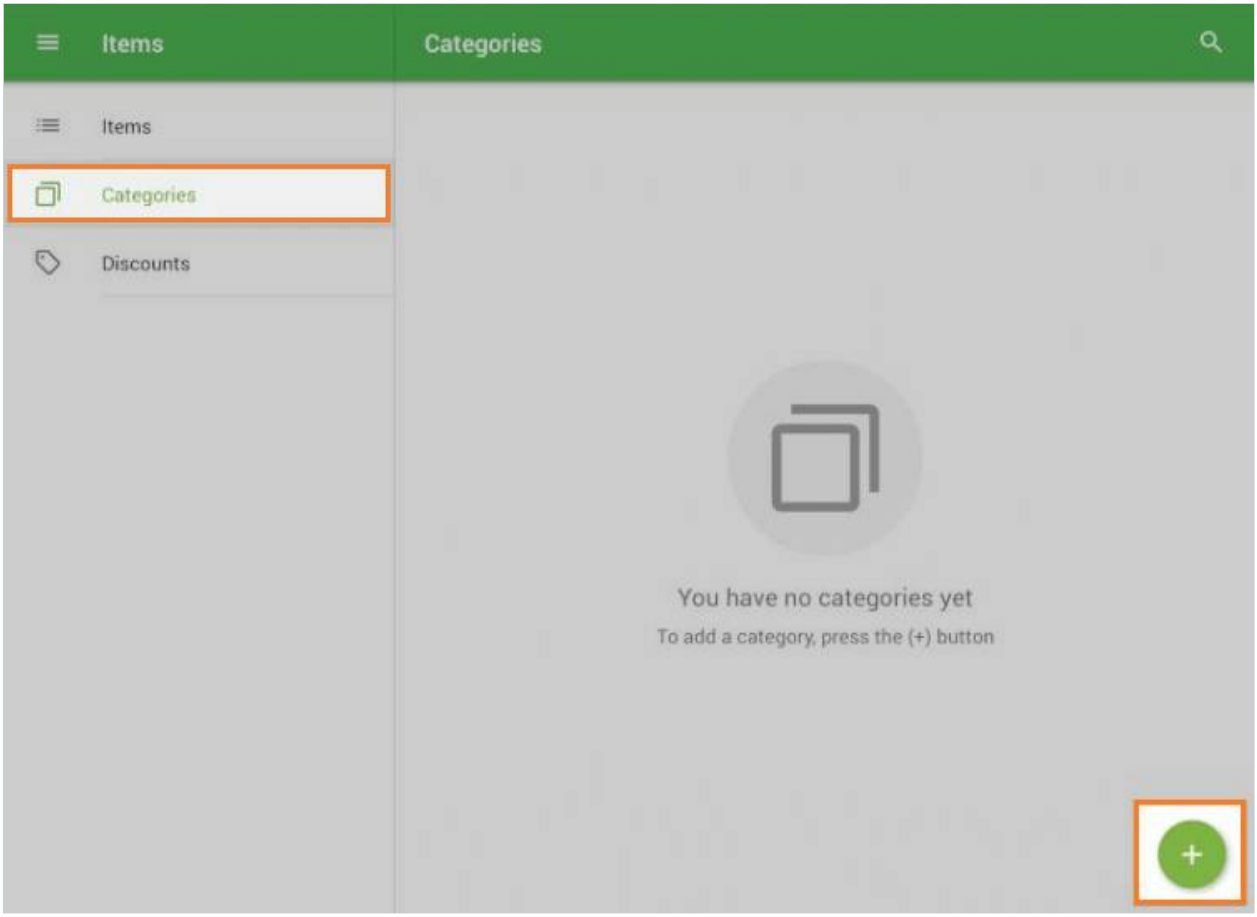
On the **Create Item** page, tap **Category > Add Category**, enter a name, and then tap **Save**.



B. From the Categories Screen

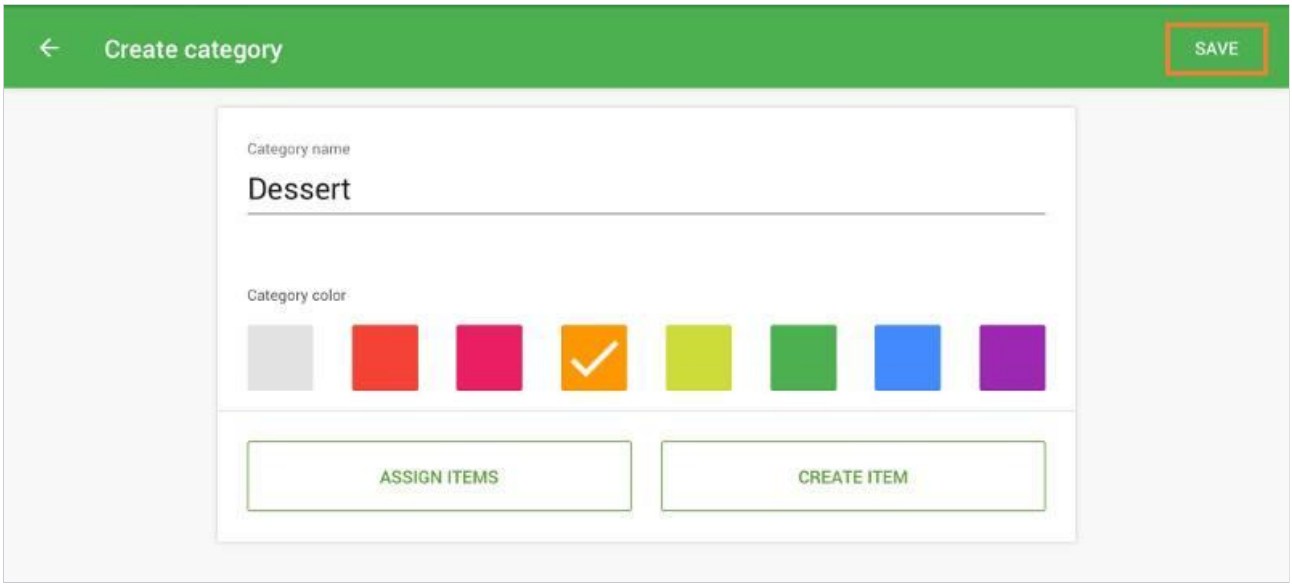
In the **Items** menu, tap **Categories**.

Tap the ⊕ **Add** button (bottom-right).



Enter:

- **Category Name**
- **Color** (for easy visual grouping on the sales screen)



Tap **Save**.

4. Sync & Verify

Loyverse POS syncs in real time. Your new items and categories will immediately appear on all connected devices and in the Back Office.

To edit or delete items/categories, tap the item or category name in the list. The **Delete** button is at the bottom of the editing page.

5. Advanced Item Settings

For more advanced options, such as items with variants or composite items, log in to your Loyverse **Back Office** on the web. Changes made there will sync back to your POS app.

You're all set! With items and categories organized, you can streamline your sales process and manage your inventory more effectively. Happy selling!

See also:

Working with the Items List in the POS

How to Make Sales

How to Create and Manage Multiple Stores under One Account

How to Add Items in the Loyverse Back Office

How to Make Sales

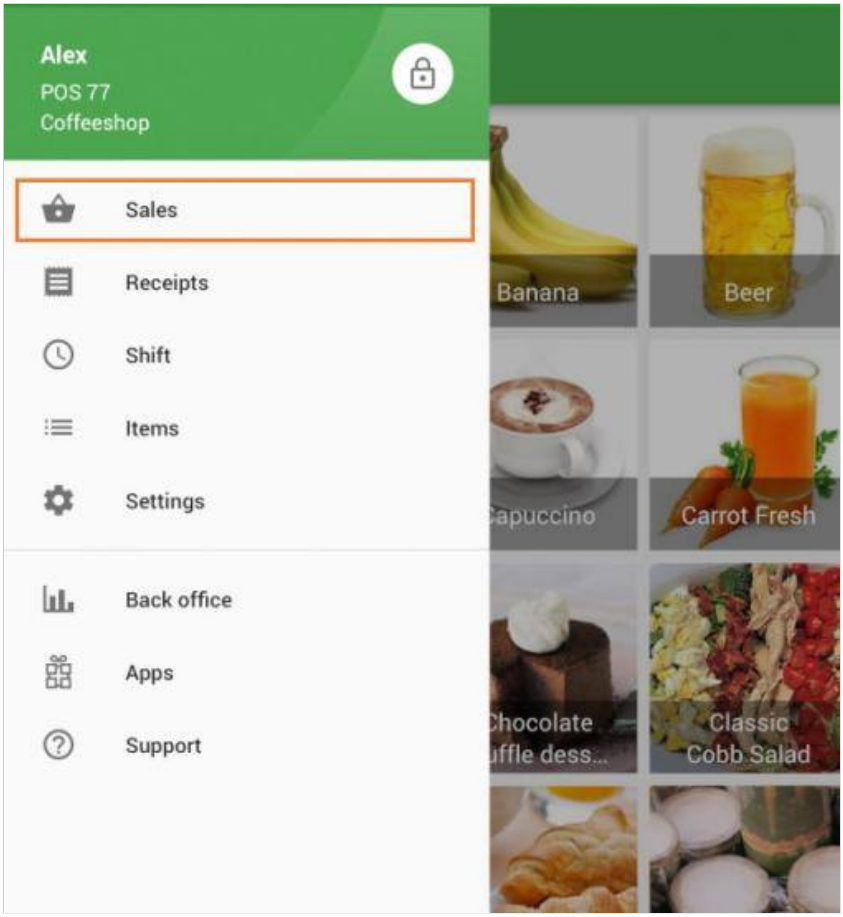
Video
https://www.youtube.com/watch?v=EIB0Z-I9ckc

Follow these steps to create and complete a sale in the Loyverse POS app.

1. Open the Sales Screen

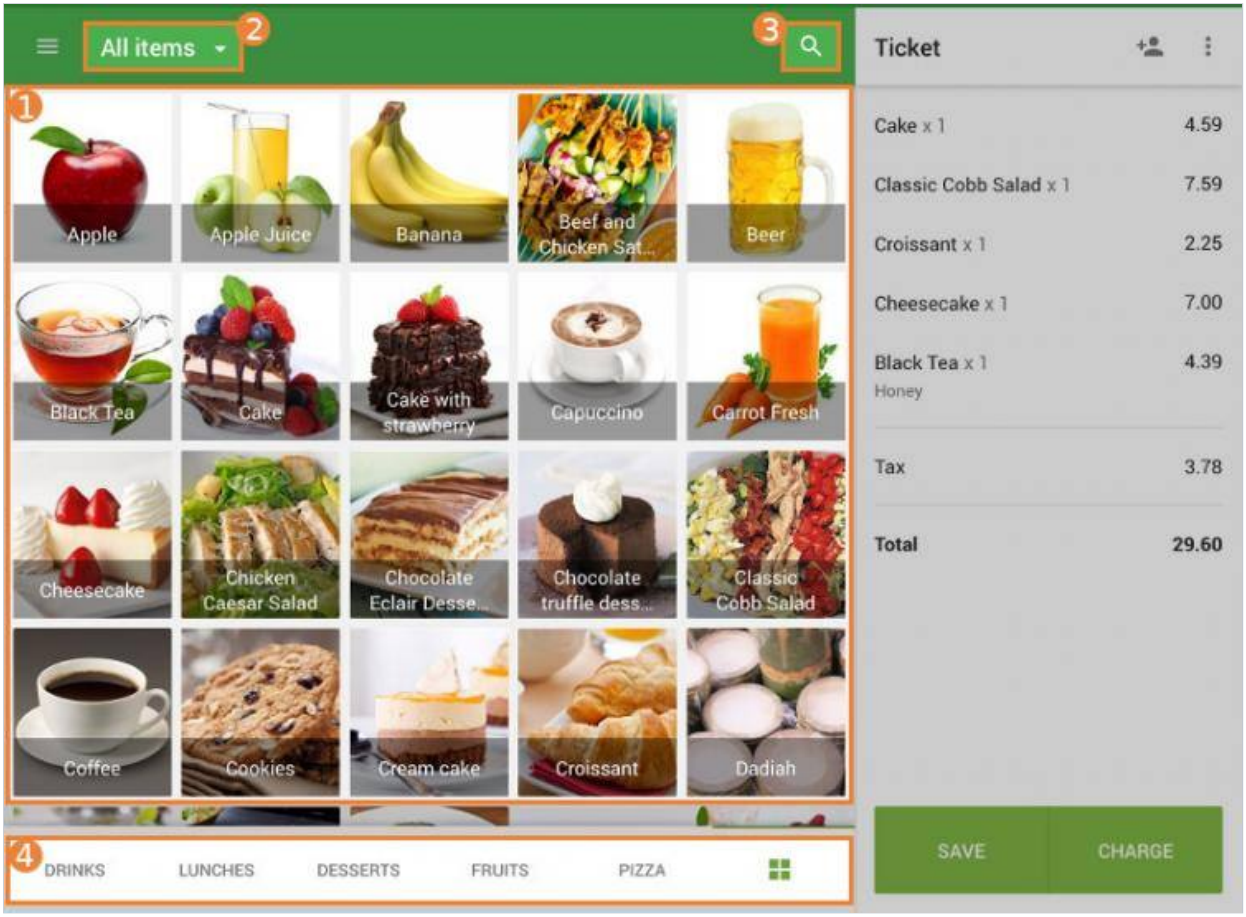
Launch the Loyverse POS app.

Tap **Sales** at the main menu.



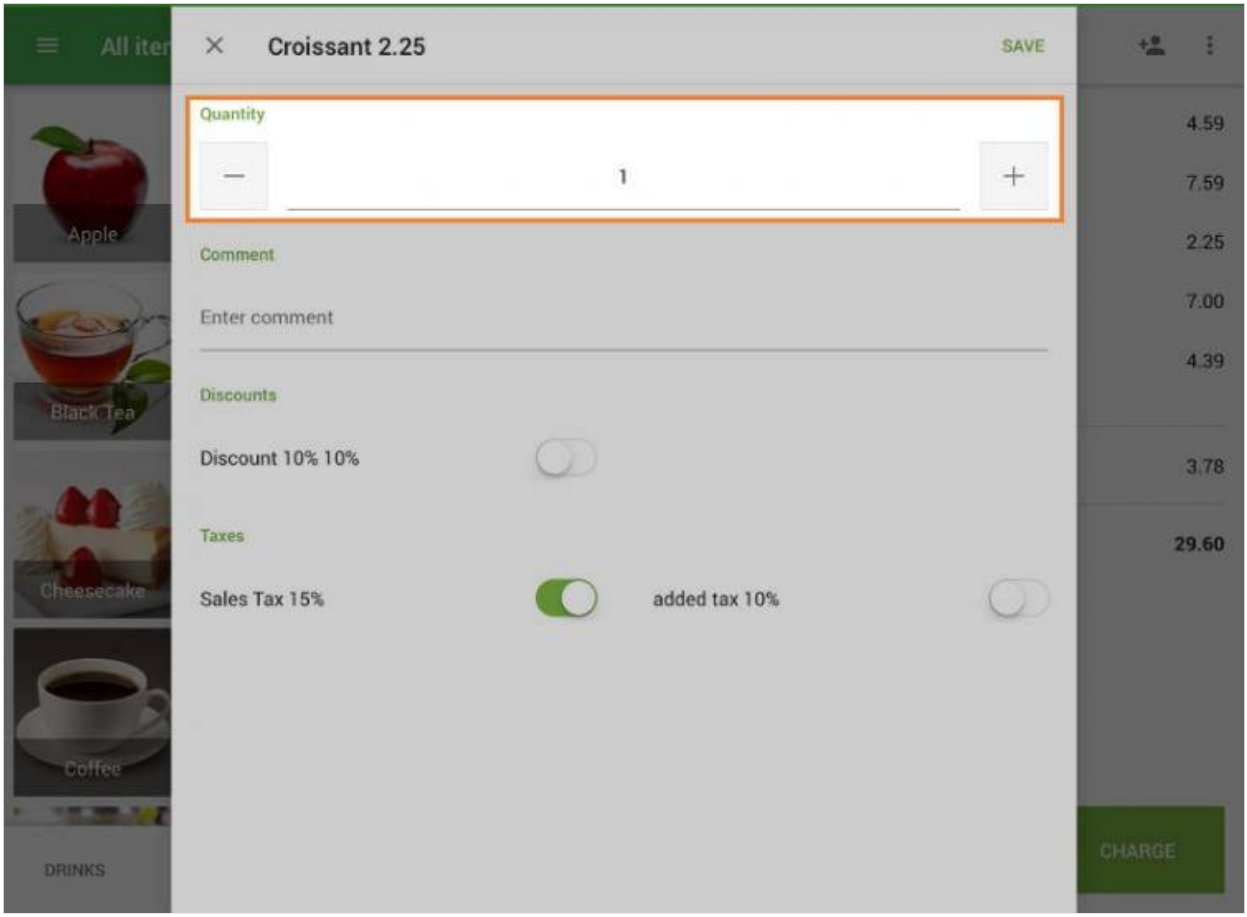
2. Add Items to the Ticket

1. **Tap an item icon** to add it to the current ticket.
2. **Filter by category:** Use the All items dropdown to select a category.
3. **Search for items:** Enter a name or SKU in the search bar.
4. **Navigate pages:** Use the page tabs at the bottom to browse—learn more in [How to Arrange Sale Screen in Loyverse POS](#).

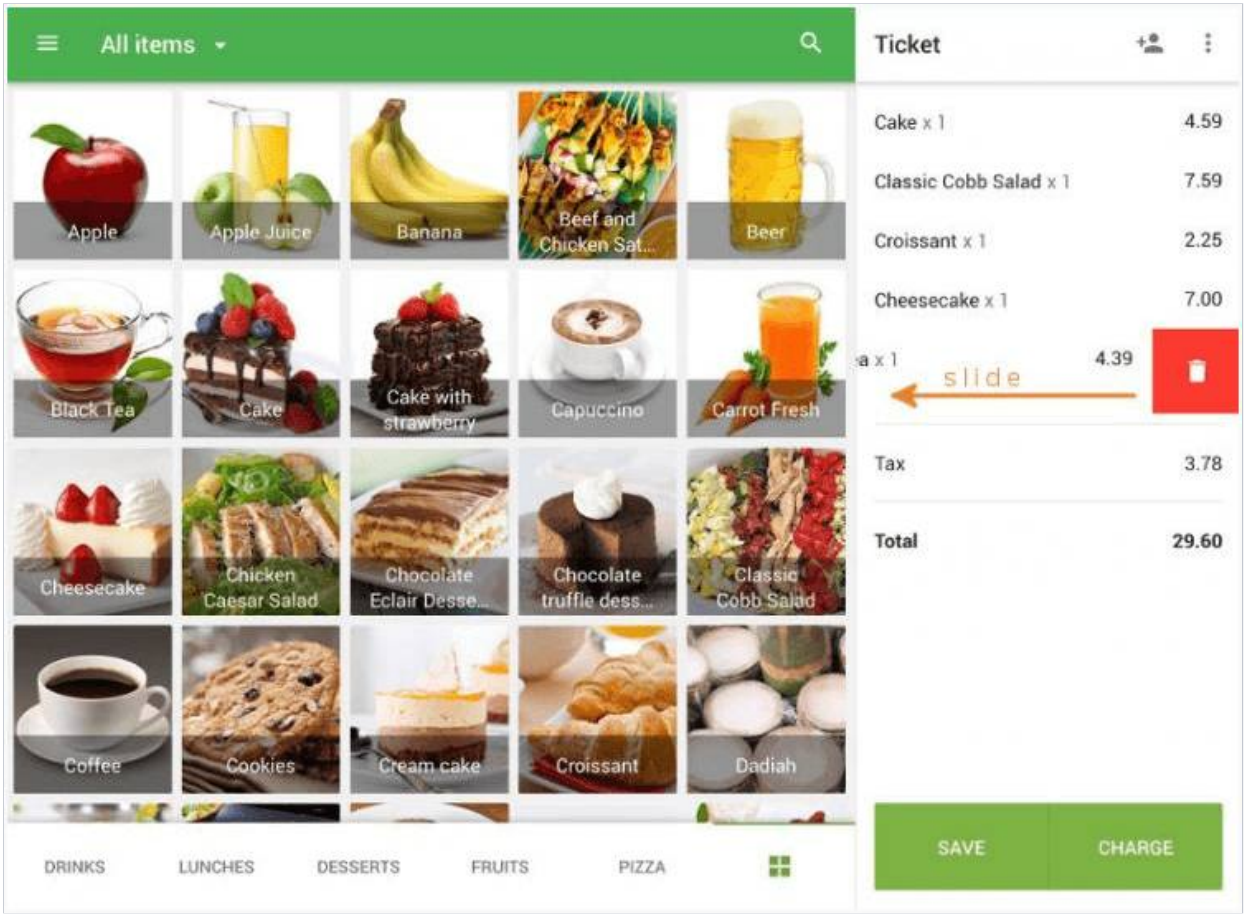


3. Adjust Items in the Ticket

Change quantity: Tap the item in the ticket, then adjust the quantity using the +/– buttons.

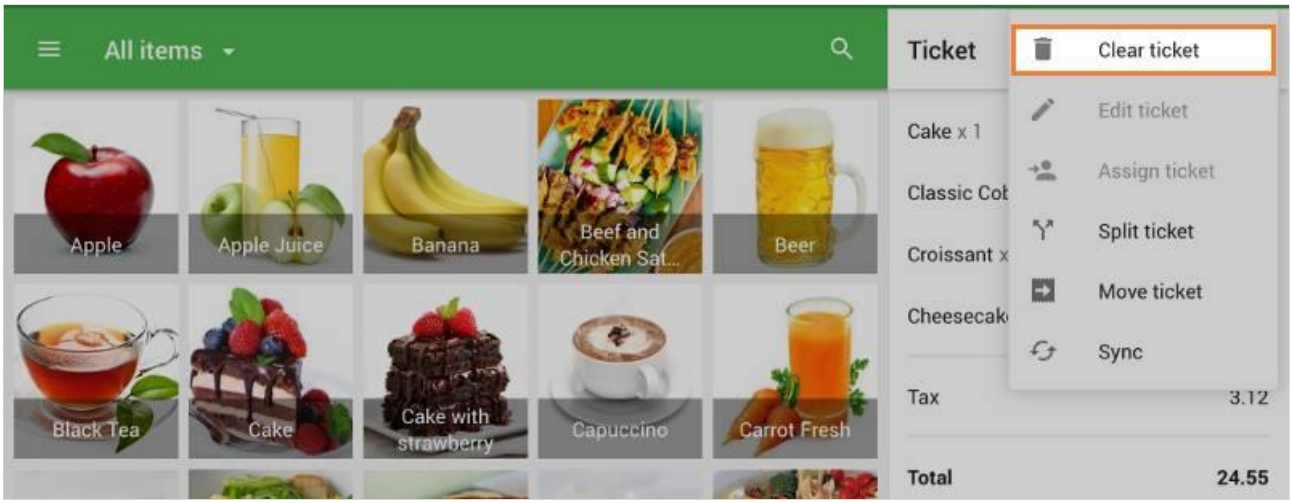


Remove an item: Swipe left on the item and tap the Delete icon.



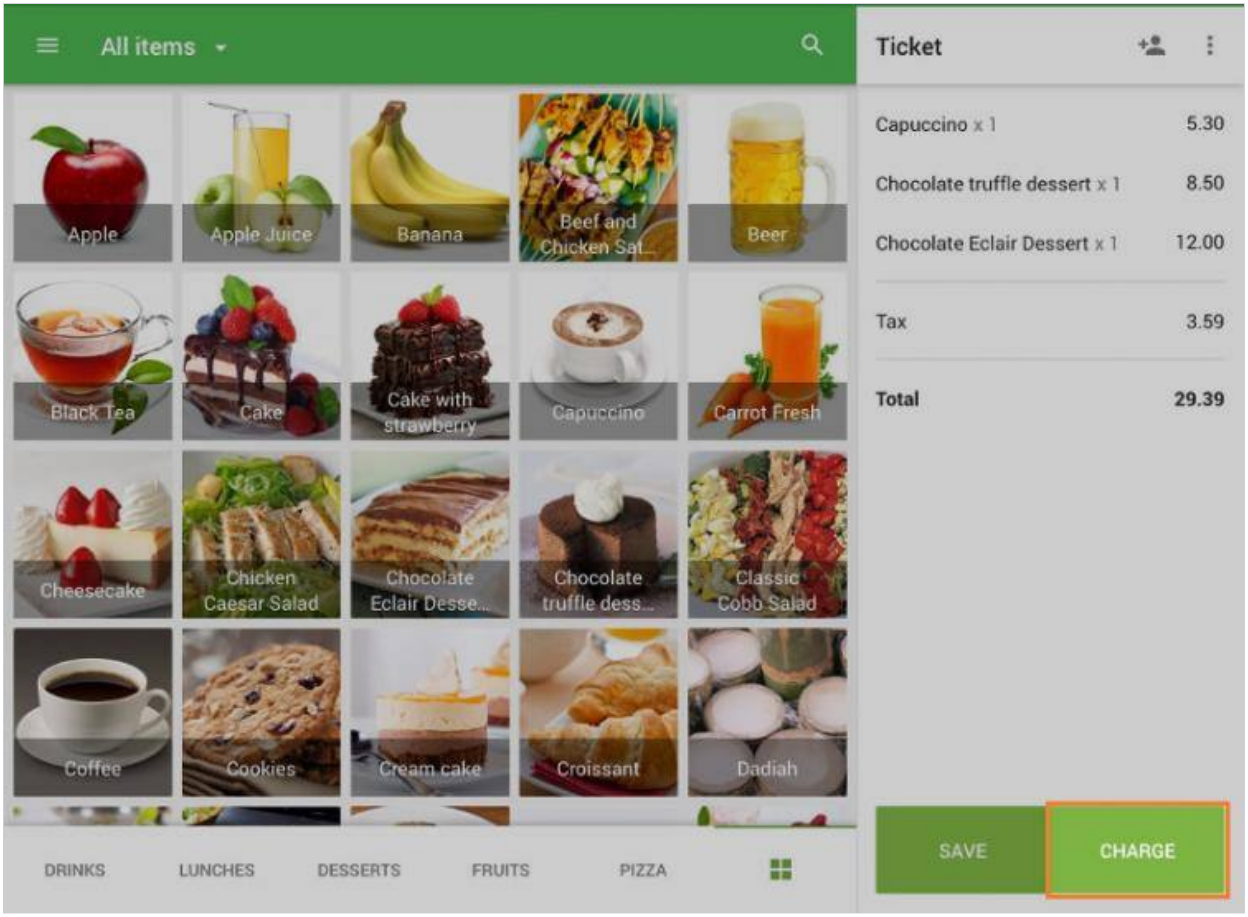
4. Clear the Ticket

If you need to void the entire sale, tap the ⋮ menu in the ticket header and select **Clear ticket**.



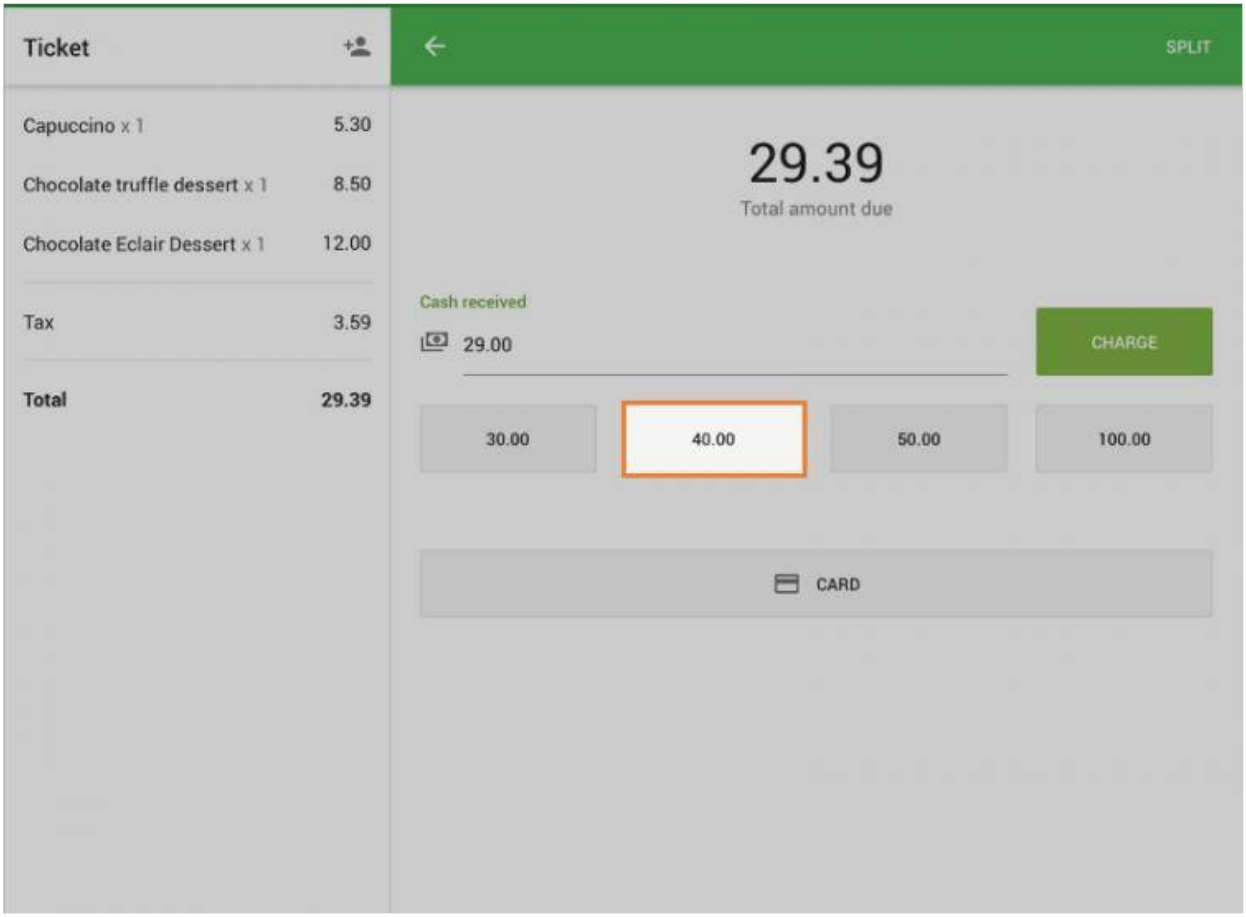
5. Process Payment

1. Tap **Charge** (bottom right).

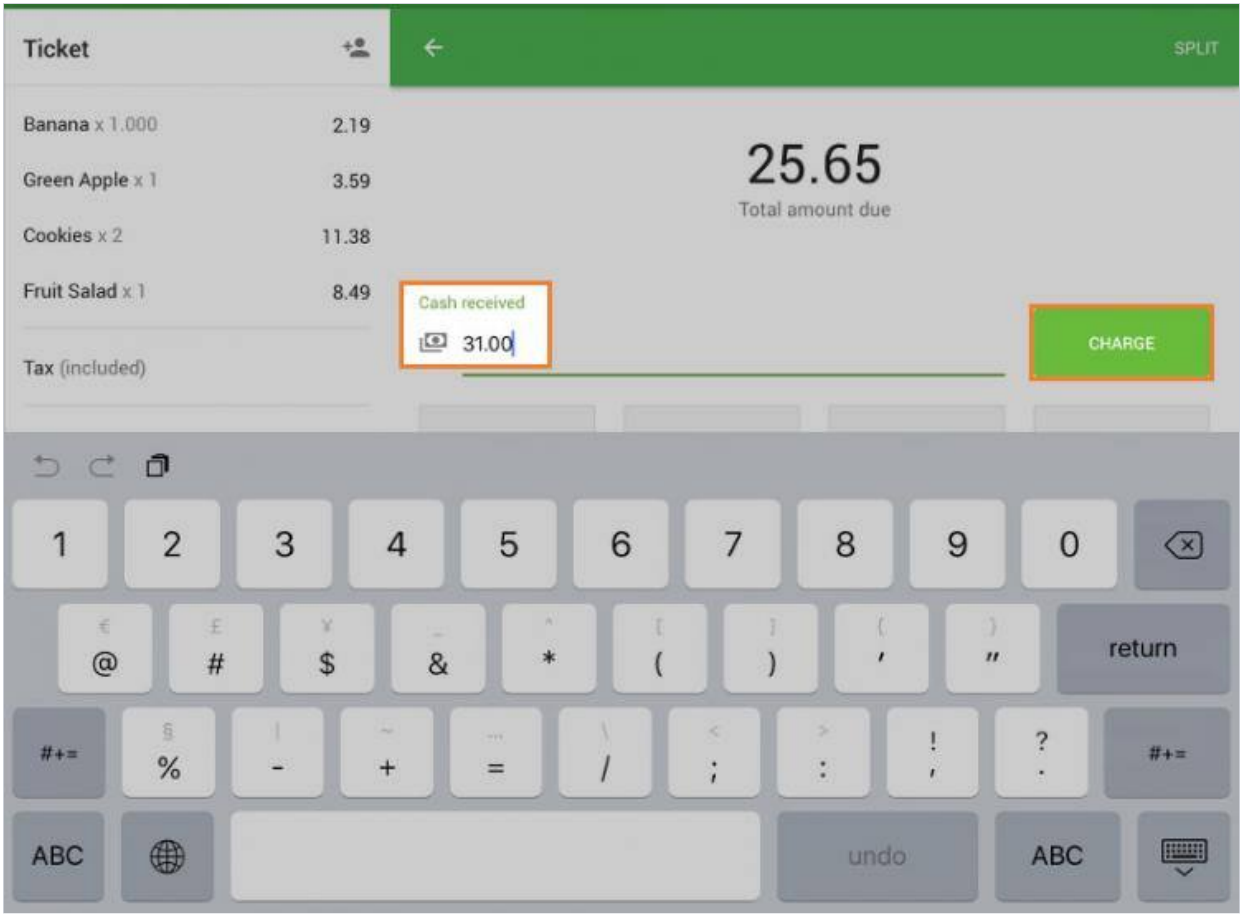


2. In the payment dialog, choose a payment method:

Cash:
Tap one of the suggested cash amounts, or



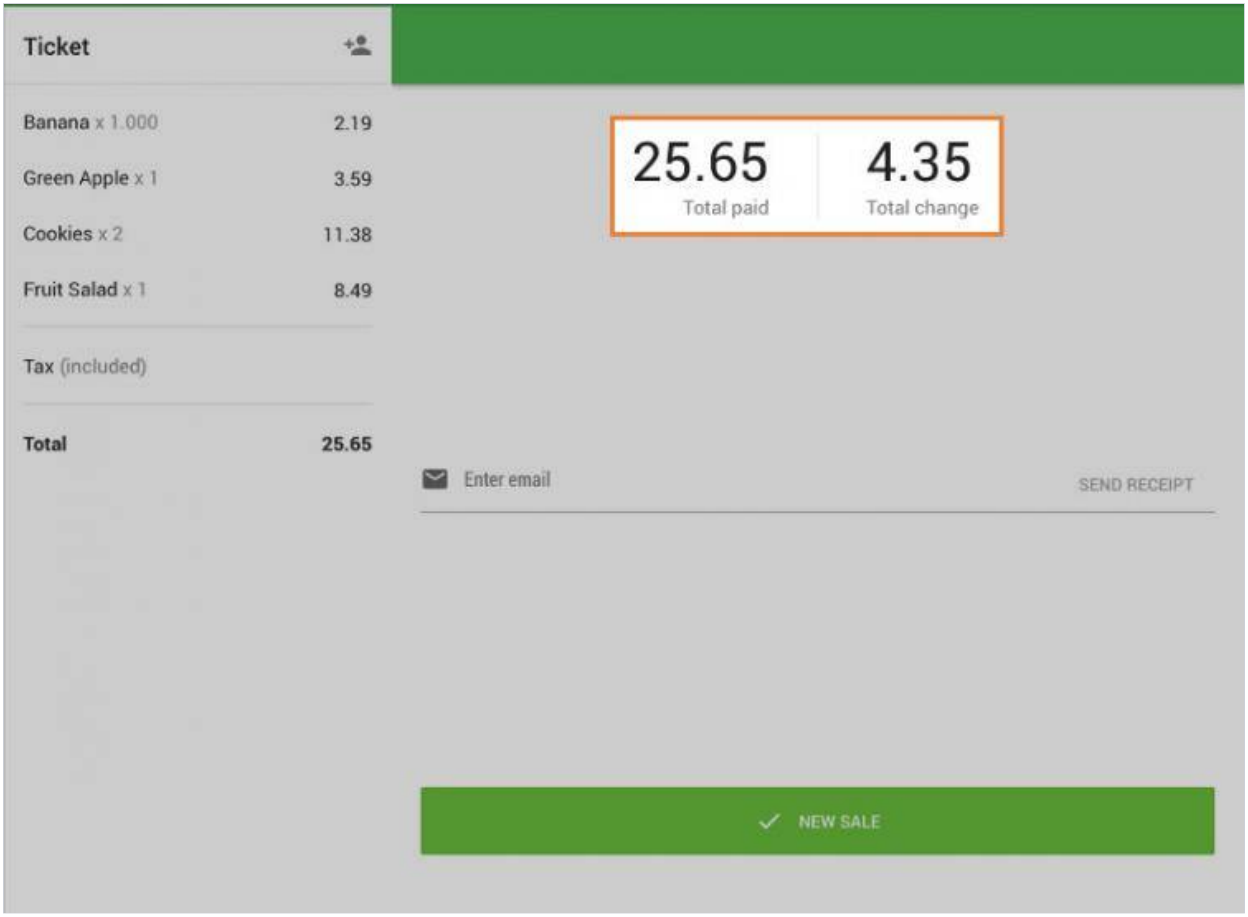
Enter a custom amount under **Cash received**, then tap **Charge**.



Card (or other methods):

Select the appropriate option and follow the on-screen prompts.

3. After processing, you'll see a summary showing the Total and Change due.



6. Complete the Sale

- **Email receipt:** Tap the Email field and enter the customer's address.
- **New sale:** Tap **New sale** to finalize the sale and begin another transaction.

With these steps, you can quickly add items, adjust quantities, process payments, and send receipts—all from your mobile device. Happy selling!

See also:

How to Sell Items Using Barcode Scanners

How to Set Up a Customer Loyalty Program

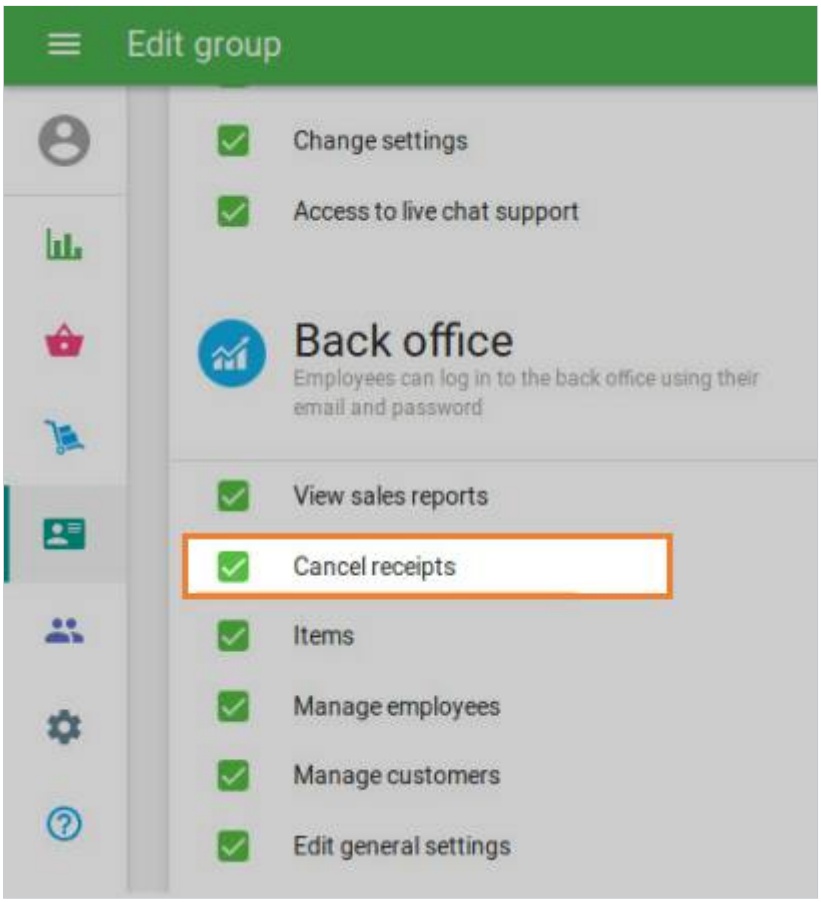
Importing and Exporting Customers

How to Cancel Receipts in Loyverse Back Office

Cancelling a receipt removes it from your sales reports and returns items to stock—ideal for reversing mistakes or test transactions. Follow the steps below to cancel receipts safely.

Who Can Cancel Receipts

Only users with the "**Cancel receipts**" permission can perform this action. By default, this right is granted to the **Owner** and **Administrator** roles.



When to Cancel a Receipt

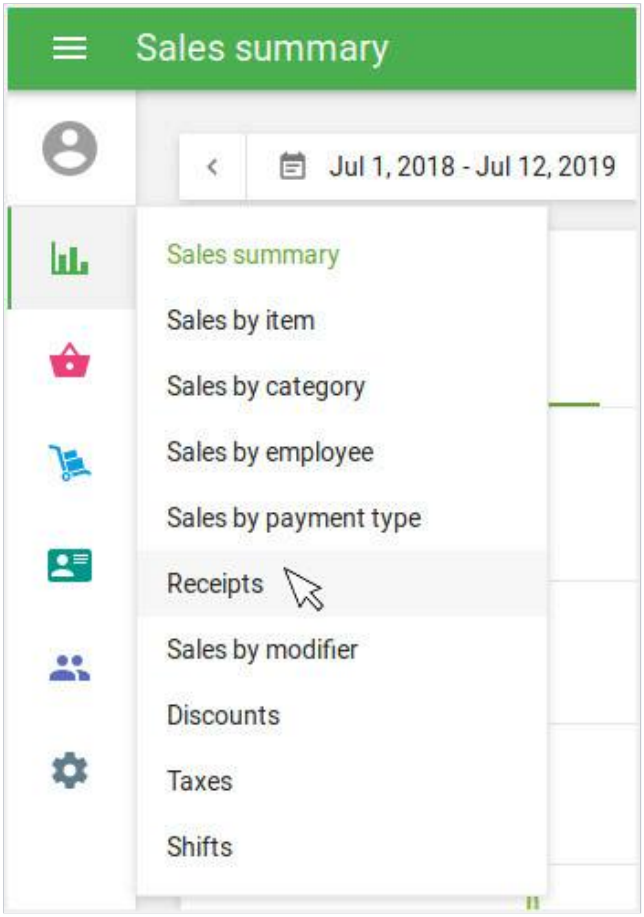
- A sale or refund was entered by mistake
- You need to void a test transaction

Tip: If a receipt has an associated refund, cancel the refund receipt first, and only then cancel the original receipt.

Step-by-Step Guide

1. Open Receipts List

In your Back Office, navigate to **Reports > Receipts**.

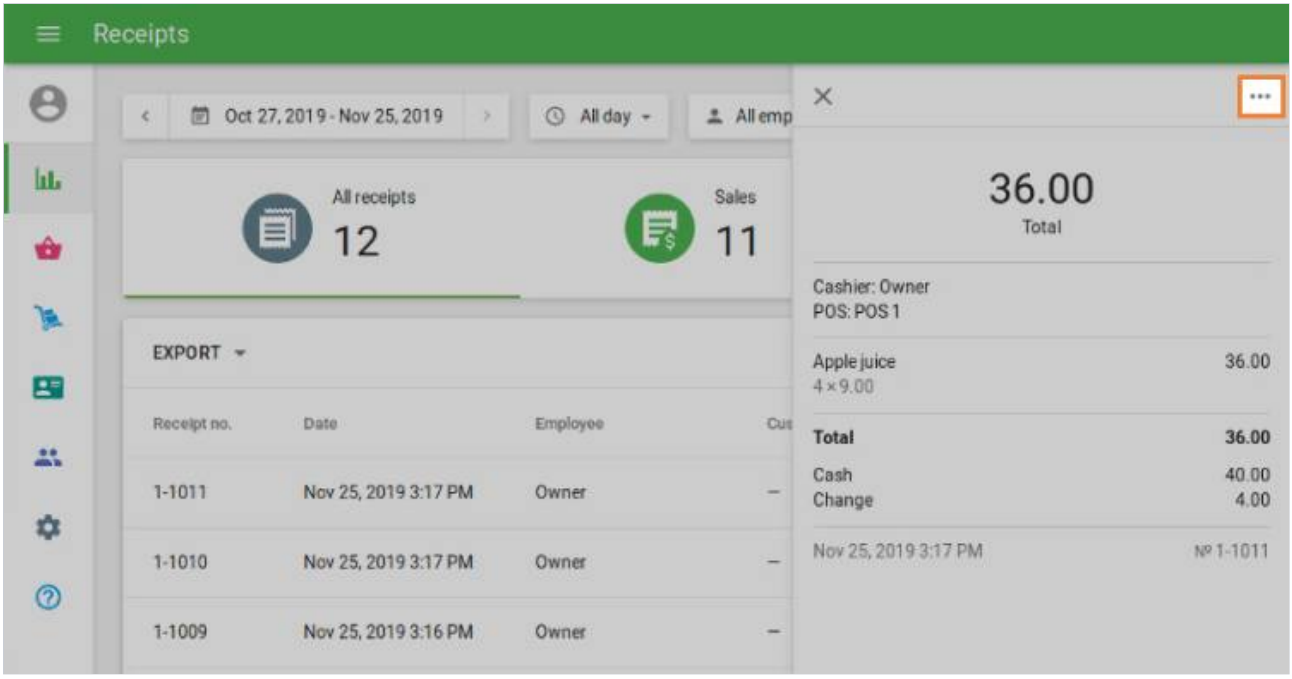


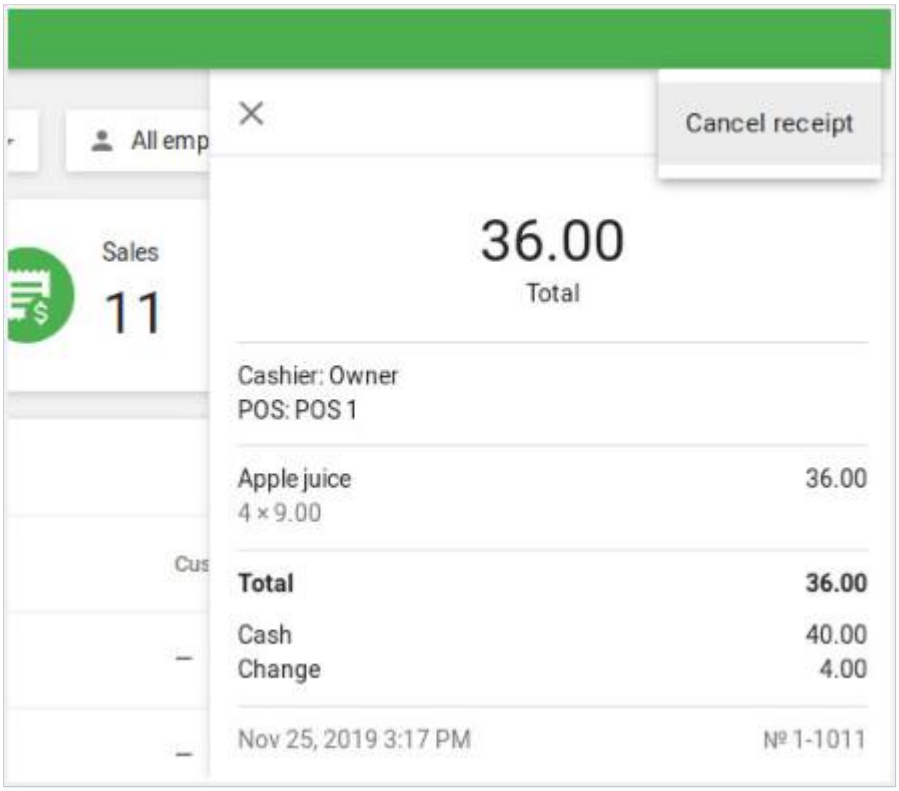
2. Select the Receipt

Click on the receipt you wish to cancel to view its details.

3. Initiate Cancellation

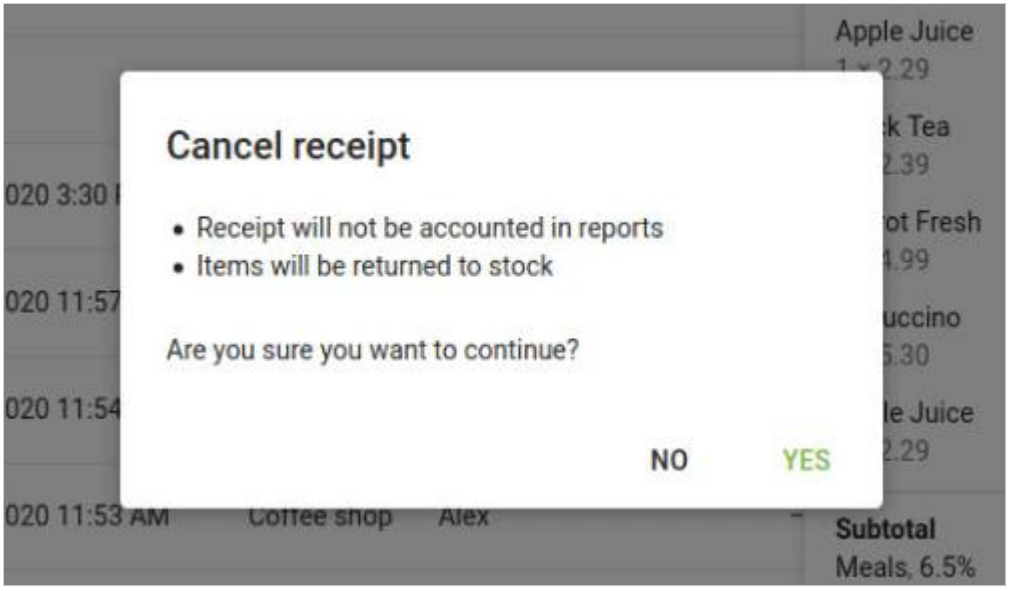
In the receipt-detail view, click the ••• menu (upper right) and choose **Cancel receipt.**





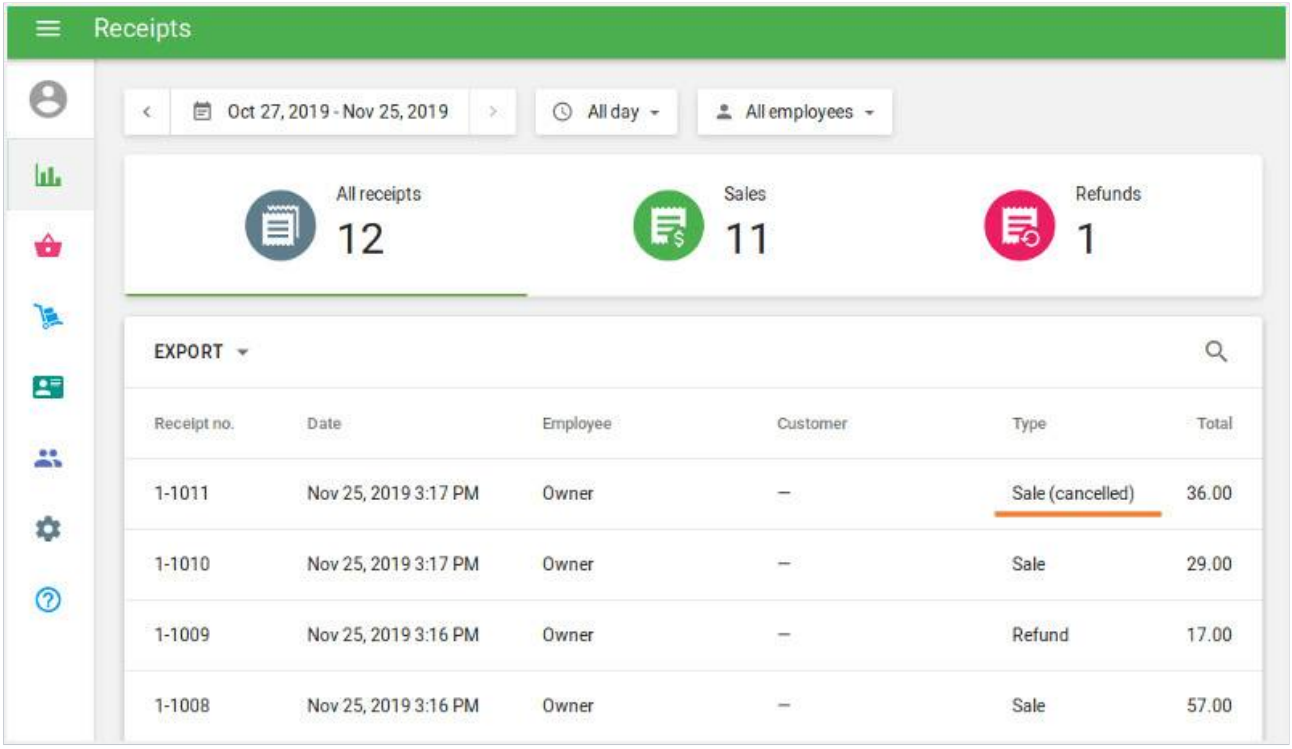
4. Confirm Cancellation

In the confirmation dialog, click **Yes** to proceed.

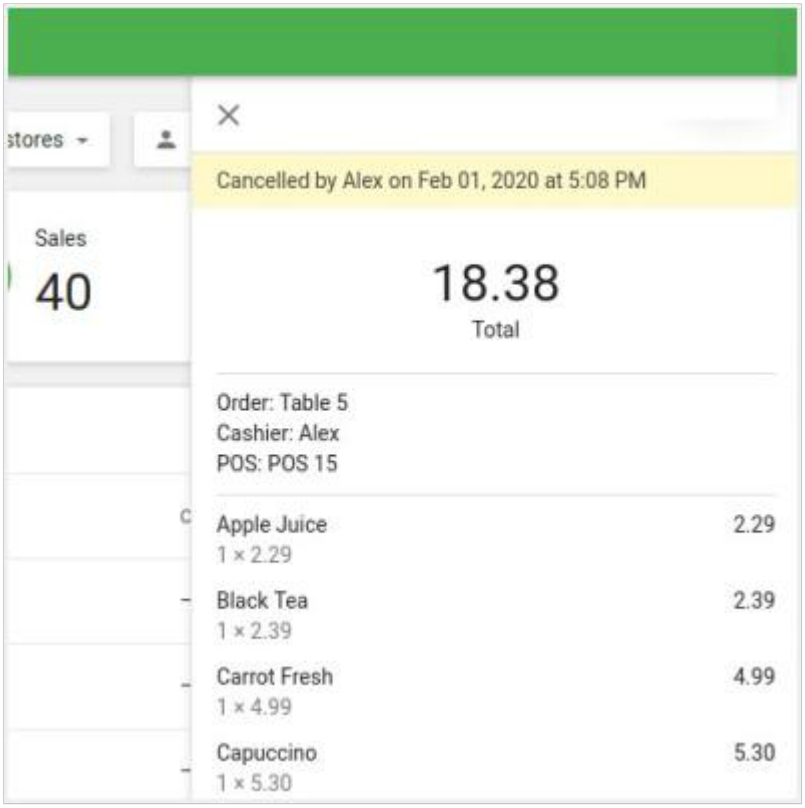


5. Verify Cancellation

The receipt will now be flagged as **Cancelled** in the list.



In the receipt details, you'll see who cancelled it and the timestamp.



What Happens After Cancellation

Reporting: Cancelled receipts are excluded from all reports and both open and closed shifts.

Inventory:

- Regular sales receipts: Items are returned to stock.
- Refund receipts: Items are deducted from stock (reversing the refund).

Important Notes

- **Irreversible:** Once cancelled, a receipt cannot be restored.
- **Refunds:** Cancelling a receipt does **not** refund integrated card payments to the customer's card—those must be handled separately.
- **Dependent Transactions:** You cannot cancel a receipt that has an active refund—you must cancel the refund receipt first.

By following these steps, you can ensure your sales data stays accurate and your inventory levels remain correct.

See also:

How to Issue a Refund on Loyverse POS

Sales

Sales & Refunds

How to Sell Items by Weight

Video
https://www.youtube.com/watch?v=nKSeiUFcXmo

Items in Loyverse POS can be sold either by piece (e.g., bottles, packs) or by weight (e.g., kilograms, pounds). Follow the steps below to configure and sell weight-based items in both the Back Office and the POS app.

1. Configure “Sold By” Option

In the Back Office

1. Log in to your Back Office.
2. Go to **Items > Item list**.
3. Select an existing item or click **Add item** to create a new one.
4. Find the **Sold By** line and choose **Weight**.
5. Enter the **Price** per unit of weight (for example, price per kg or per lb).
6. Click **Save**.

In the Loyverse POS App

1. Open the Loyverse POS app.
2. Tap ☰ **Menu** (top left) and select **Items**.
3. Tap an existing item or the ⊕ **Add** button (bottom right).
4. Under **Sold By**, choose **Weight**.
5. Enter the **Price** per unit of weight.
6. Tap **Save**.

2. Selling a Weighted Item

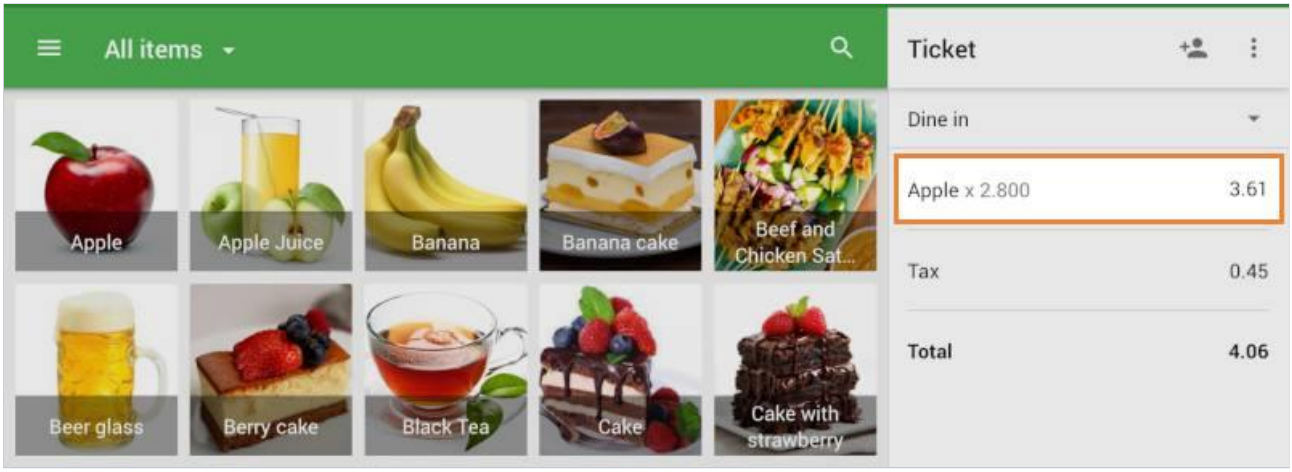
Go to the **Sales** screen in the POS app.

Tap the item icon to add it to the ticket.

A numeric keypad will pop up:

- Enter the actual weight (e.g., 2.8 for 2.8 kg).
- Tap OK.

The system calculates: **Price** per unit × **Entered weight** = **Line total**



Complete the sale as usual (see "How to Make Sales" for payment steps).

With these steps, you can seamlessly sell items by weight, ensuring accurate pricing and inventory management in Loyverse POS.

See also:

How to Make Sales

How to sell liquids

How to Scan Barcodes with Embedded Weight

How to Issue a Refund on Loyverse POS

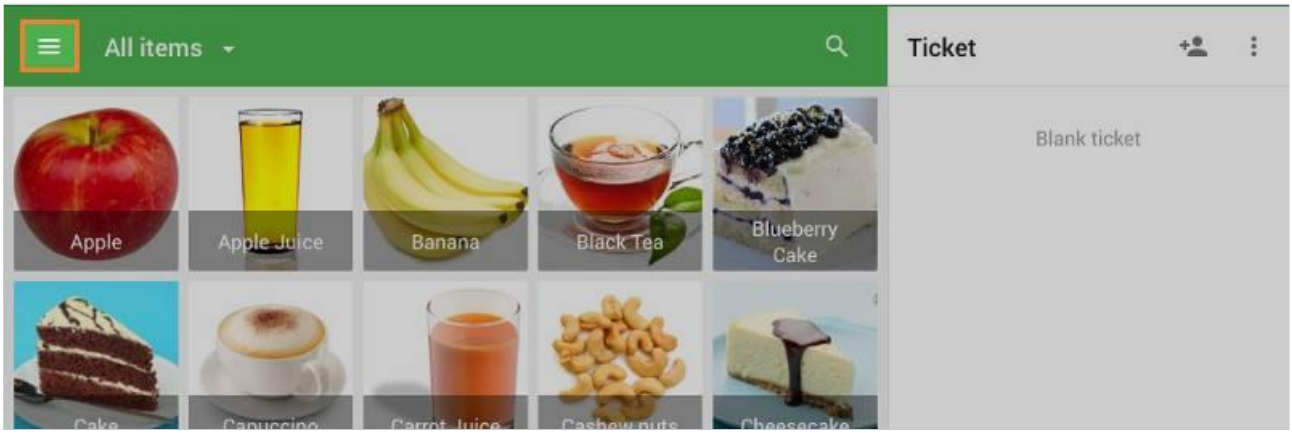
Video
https://www.youtube.com/watch?v=kzolGz7lh2o

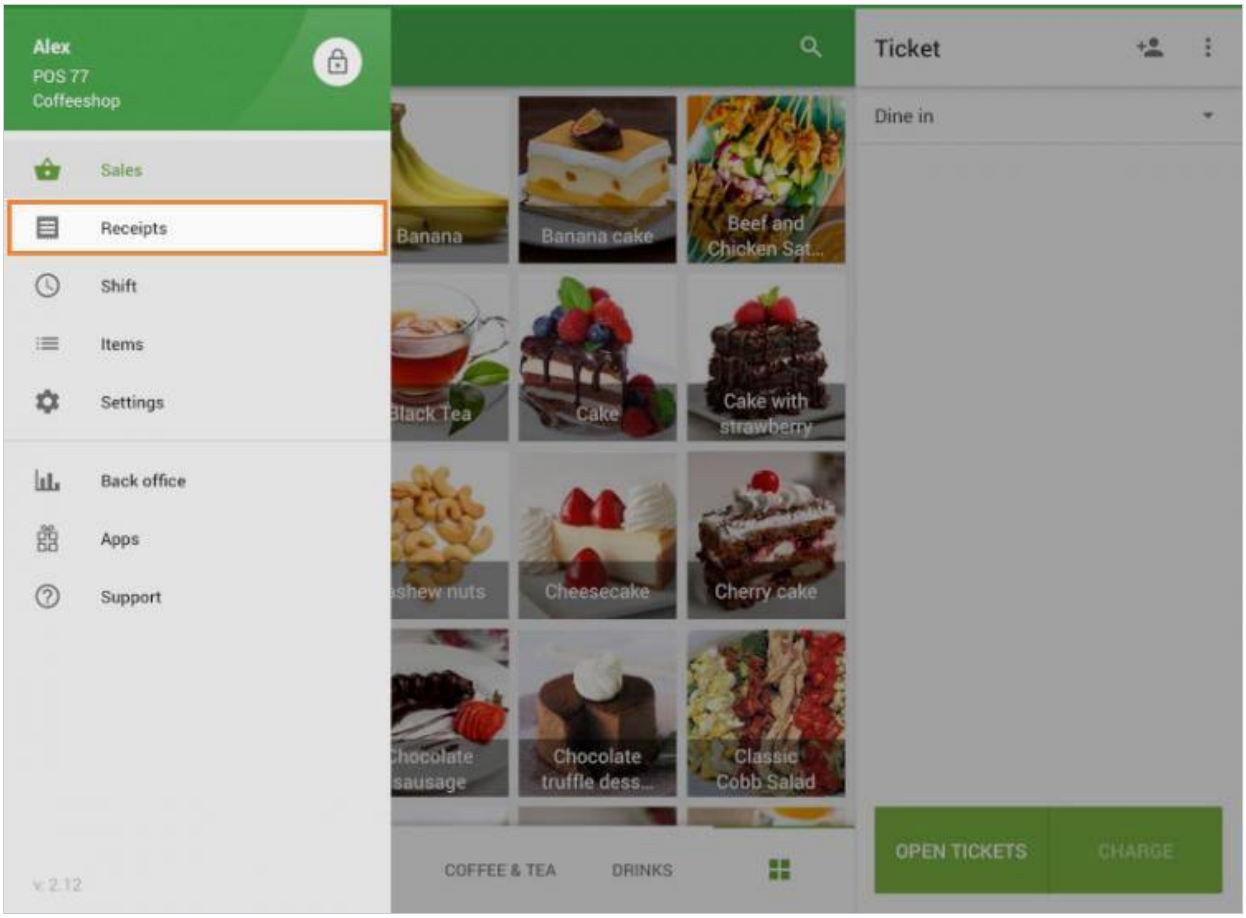
Refunding a transaction in Loyverse POS is quick and keeps your inventory and reports accurate. Follow these steps on your mobile device.

1. Open the Receipts List

Launch the Loyverse POS app.

Tap ☰ **Menu** (top left) and select **Receipts**.

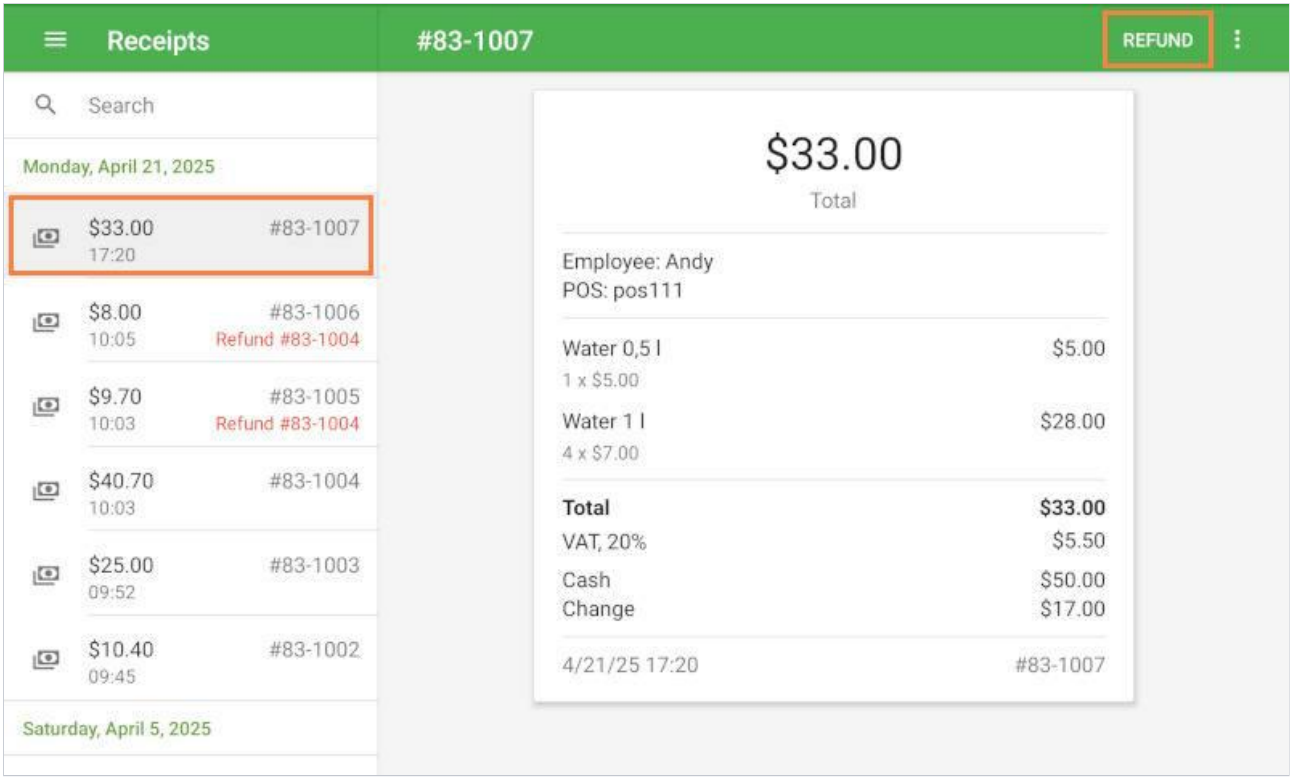




2. Select the Receipt to Refund

Scroll or search the list to find the receipt you want to refund.

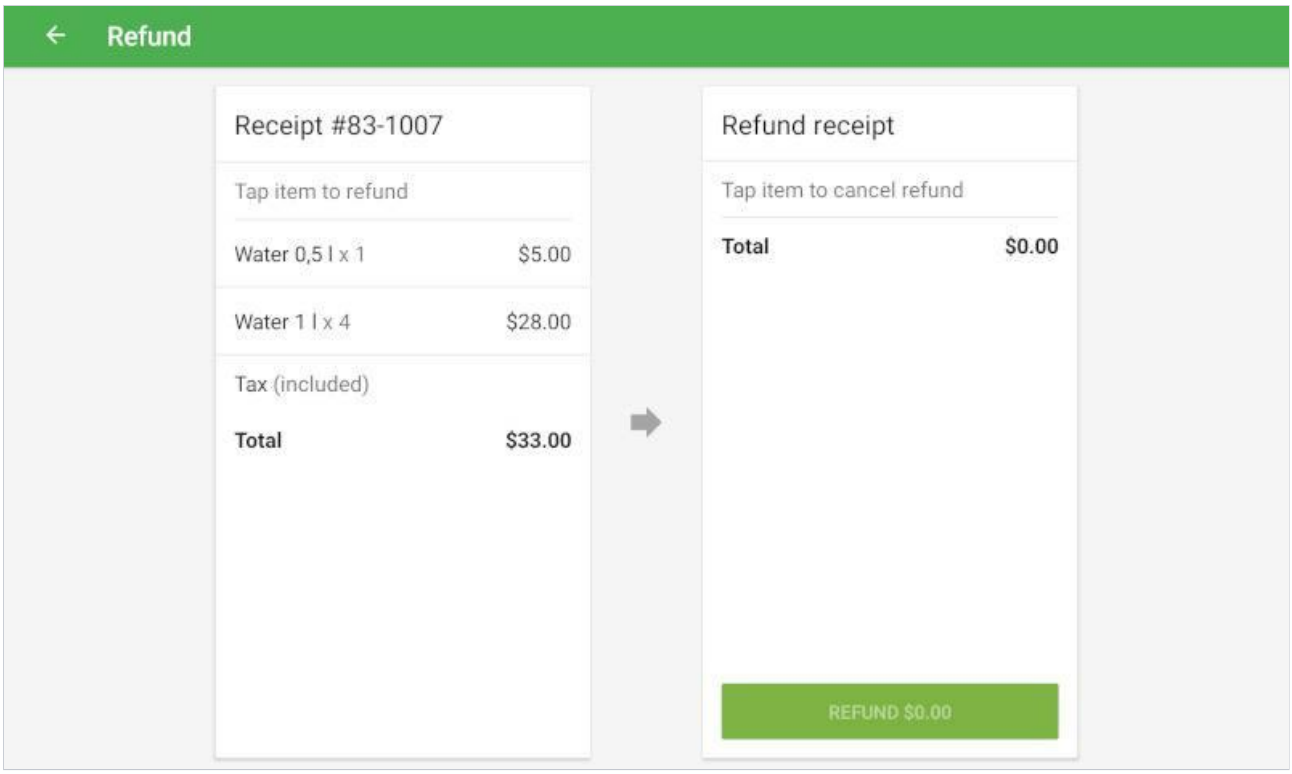
Tap that receipt to view its details.



3. Start the Refund

In the receipt detail screen, tap **Refund**.

You'll be taken to the **Refund Receipt** screen, which shows all sold items on the left.



4. Choose Items and Quantities

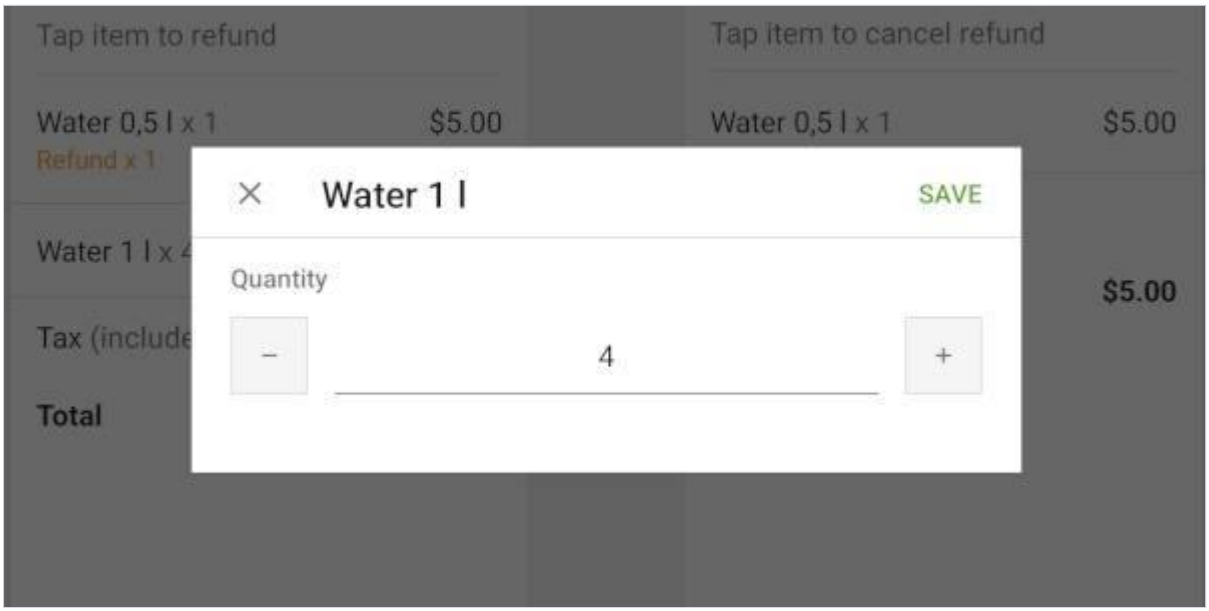
Tap an item in the left column to add it to the refund ticket:

A. Items sold by quantity:

- If the sold quantity is **1**, the item moves immediately into the refund ticket.
- If the sold quantity is **two or more**, a dialog appears allowing you to specify the number to refund:

Use **+ / –** buttons or enter an exact number via the keyboard.

Tap **Save** to confirm.



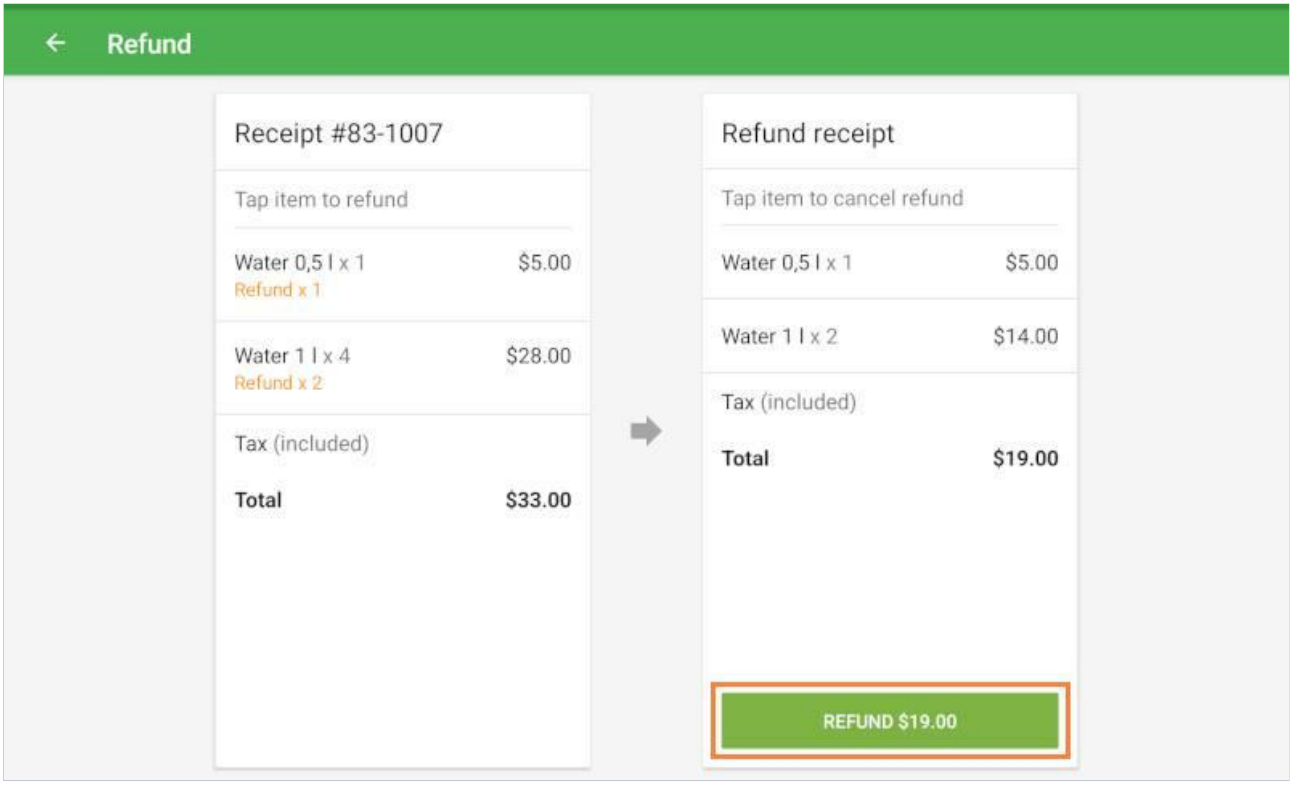
B. Items sold by weight:

Tapping moves the entire sold weight into the refund ticket. Partial-weight refunds are not supported.

Repeat for each item you need to refund.

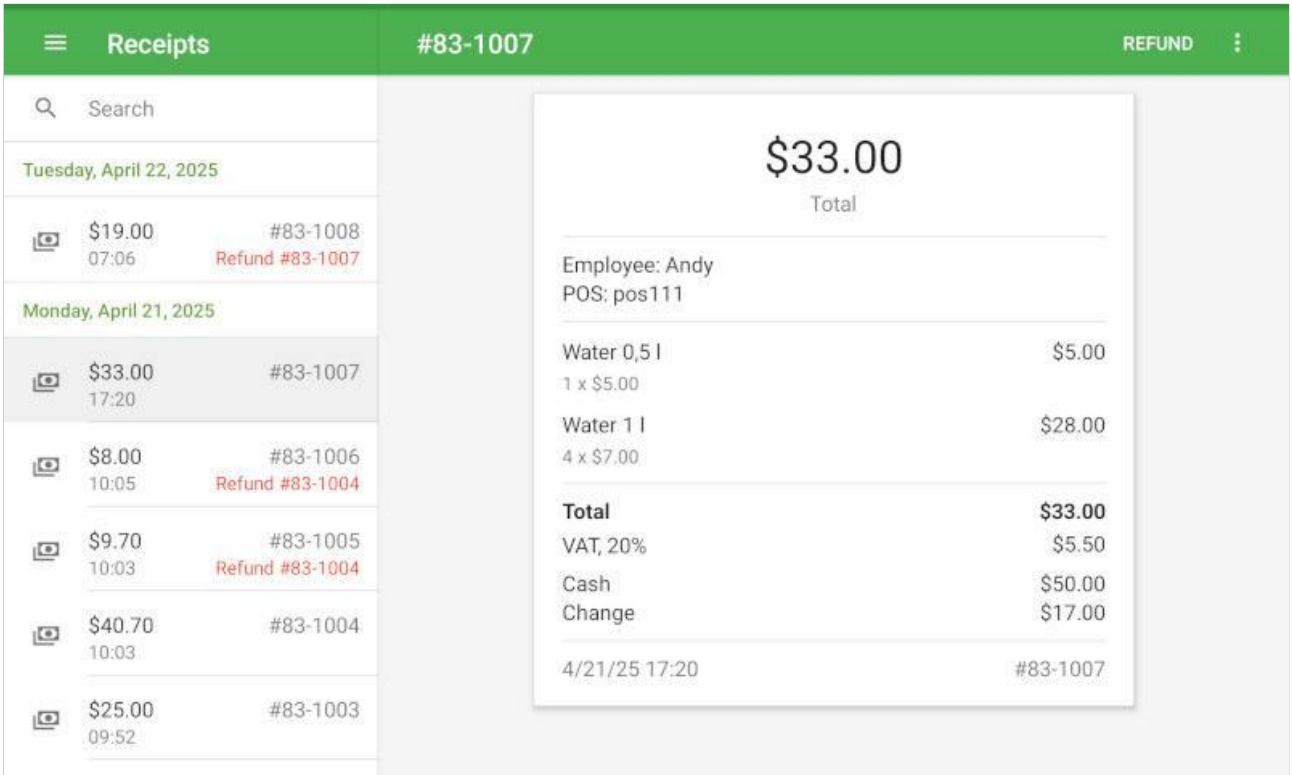
5. Complete the Refund

Once the correct items and quantities appear on the right, tap **Refund** at the bottom.



6. Verify the Refunded Receipt

Refunded receipts are highlighted in red text **Refund** within the Receipts list.



Important Notes

Internet Connection: Refunds require an active internet connection to sync with the Back Office.

Stock Update: Refunded items are automatically added back into inventory based on the refunded quantity.

Cross-Device Refunds: You can refund receipts issued on any POS device for the same store as long as they're synced.

By following these steps, you'll ensure that your sales data and stock levels remain accurate after every refund.

Didn't find an answer?
Check out the Loyverse Community

See also:

Receipts List in the POS

Offline Use of Loyverse POS

Video
https://www.youtube.com/watch?v=jmDXbosm1Ek

The Loyverse POS app allows you to make sales and manage shifts even without an Internet connection. While offline, the app continues to function for main sales activities, but some features are unavailable. Here's what you need to know about using Loyverse POS offline:

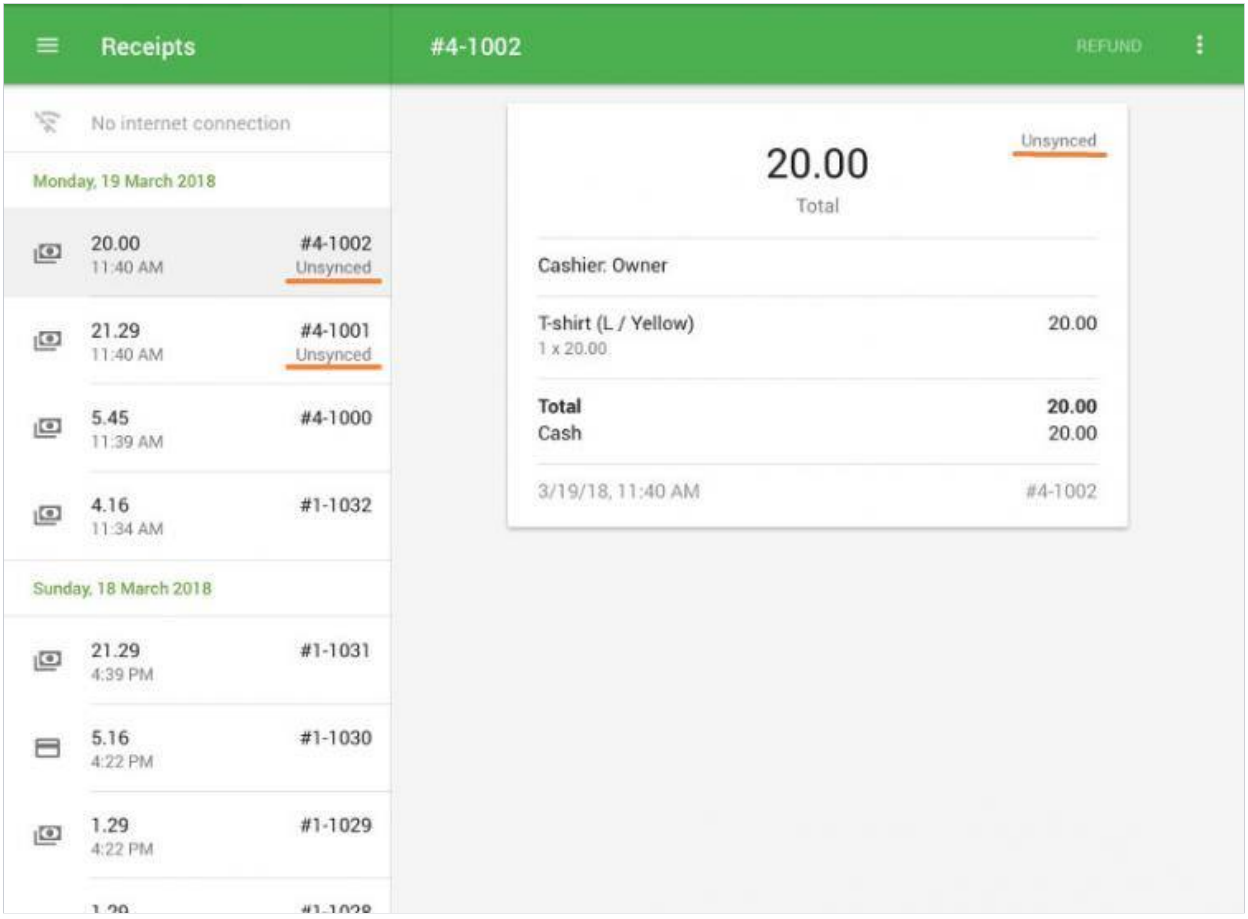
Key Features Available Offline:

- Sales transactions can be processed and recorded.
- Shifts can be managed without interruption.

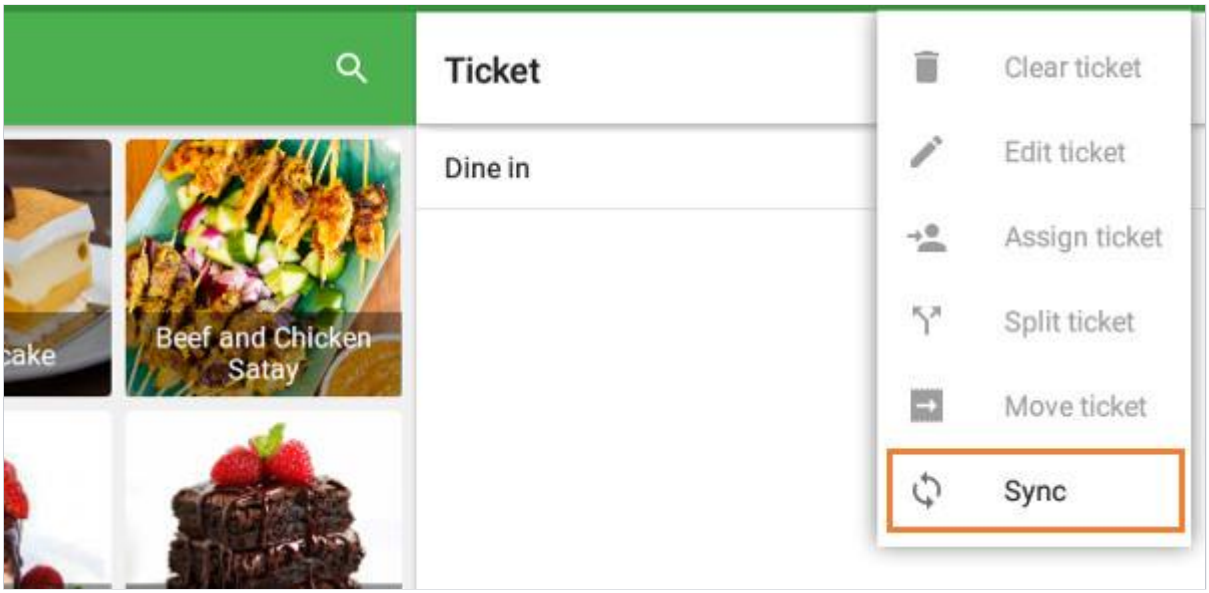
Limitations While Offline:

1. Unsynced Receipts:

Receipts for offline sales are stored locally on your device and marked as "Unsynced" in the Receipts section.



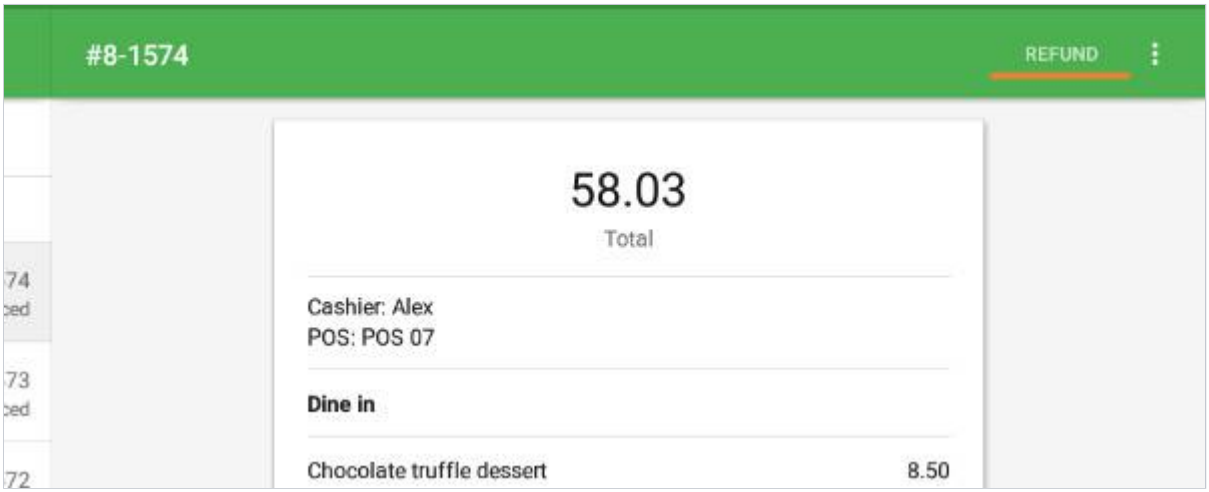
These receipts will automatically sync with the Back Office once the Internet connection is restored.
Alternatively, you can manually sync receipts by tapping the sync button in the three-dots menu. However, if you attempt this offline, you will see a "No internet connection" message.



2. Logout Restrictions:
The system will not allow you to sign out of Loyverse POS while there are unsynced receipts on the device.

Before logging out, ensure all receipts have been transferred to the Back Office by connecting to the Internet.

3. Refunds:
The refund button is disabled in offline mode, so refunds cannot be processed.



4. Customer Management:
New customer registration and editing of existing customer details are unavailable offline. You can, however, add recently registered customers to a ticket.

5. Open Tickets:
Open tickets can be created and managed offline but will not sync with other devices until the Internet connection is restored.

6. Email Receipts:
Email receipts are queued and sent to customers only after the connection to the Internet is reestablished.

7. Integrated Card Terminals:
Integrated card processing terminals do not work offline.

8. Inventory Tracking:
Stock levels and negative stock alerts are not displayed offline, even if these features are enabled in the Back Office.

Important Notes:

- Reconnect to the Internet periodically to sync data with the Back Office.
- Plan for limited functionality when working offline, especially for tasks like making refunds, customer management, and inventory tracking.

See also:

Receipts List in the POS

[How to Sign out from Loyverse POS]

Dining Options

Video
https://www.youtube.com/watch?v=bdjECnHMU3A

Dining options help you specify the type of customer order—whether it is **dine-in**, **takeout**, or **delivery**. This distinction is useful for organizing kitchen workflow and customer service, and is also important in regions where **tax rules differ depending on the dining method**.

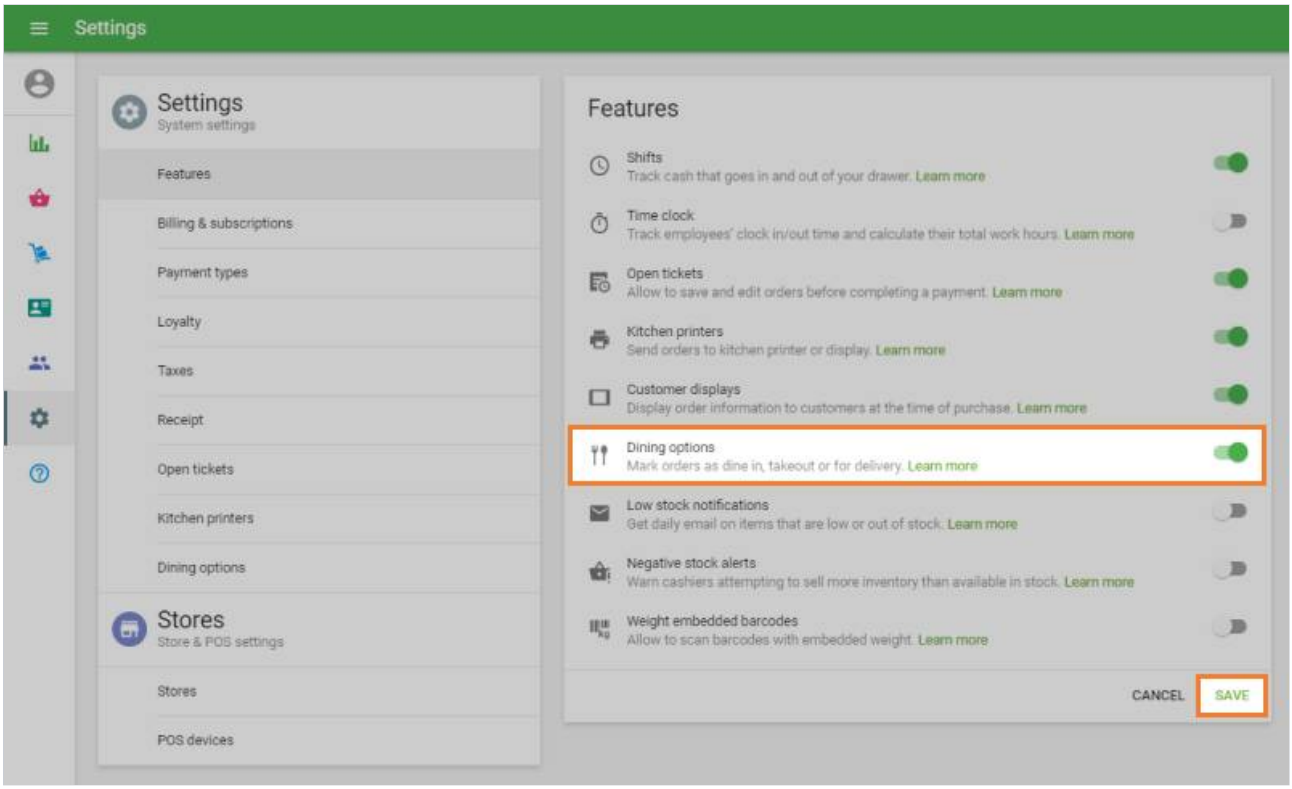
Example: In some countries, **takeout food is tax-exempt**, while the **same food consumed on-site is subject to tax**. Using dining options helps you apply the correct tax settings automatically during sales.

Enabling Dining Options

Log in to the Back Office.

Go to **Settings → Features**.

Toggle the '**Use dining options**' switch to **ON**.



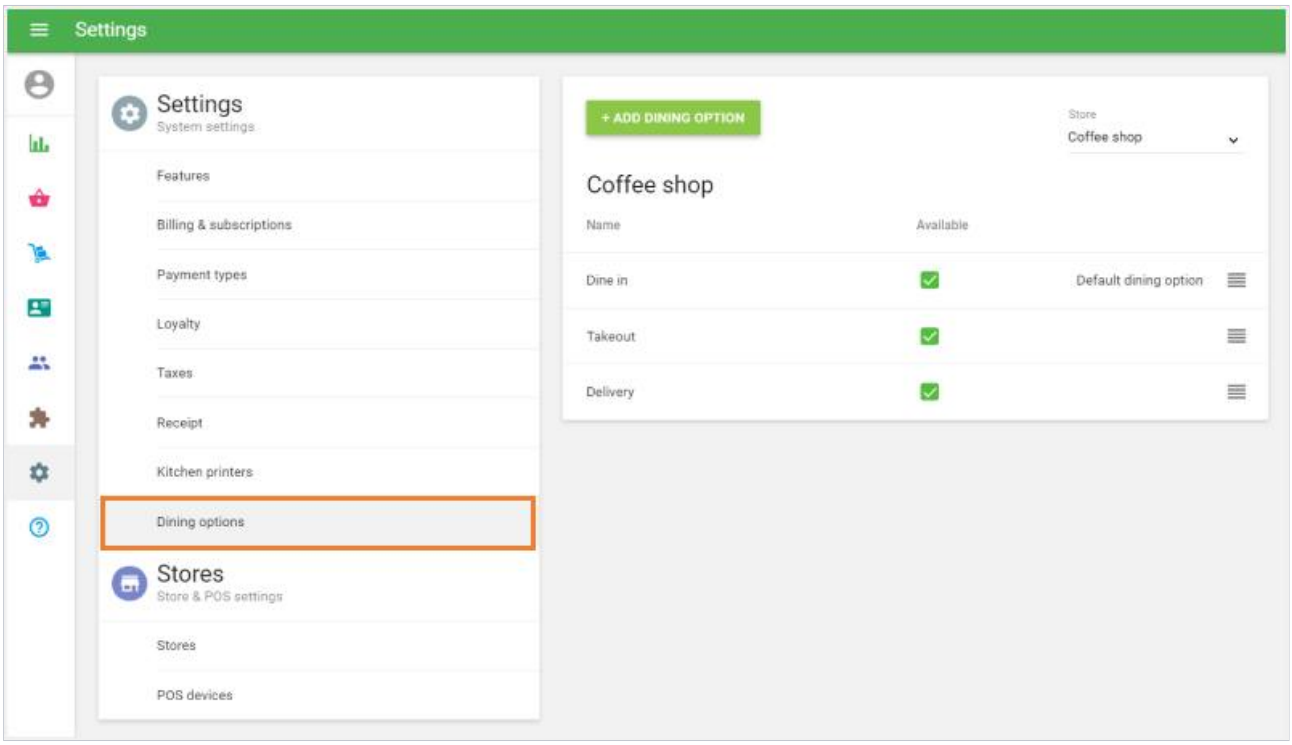
Click '**Save**' to apply the changes.

Once enabled, a new **Dining options** section will appear in the Settings menu.

Setting Up Dining Options

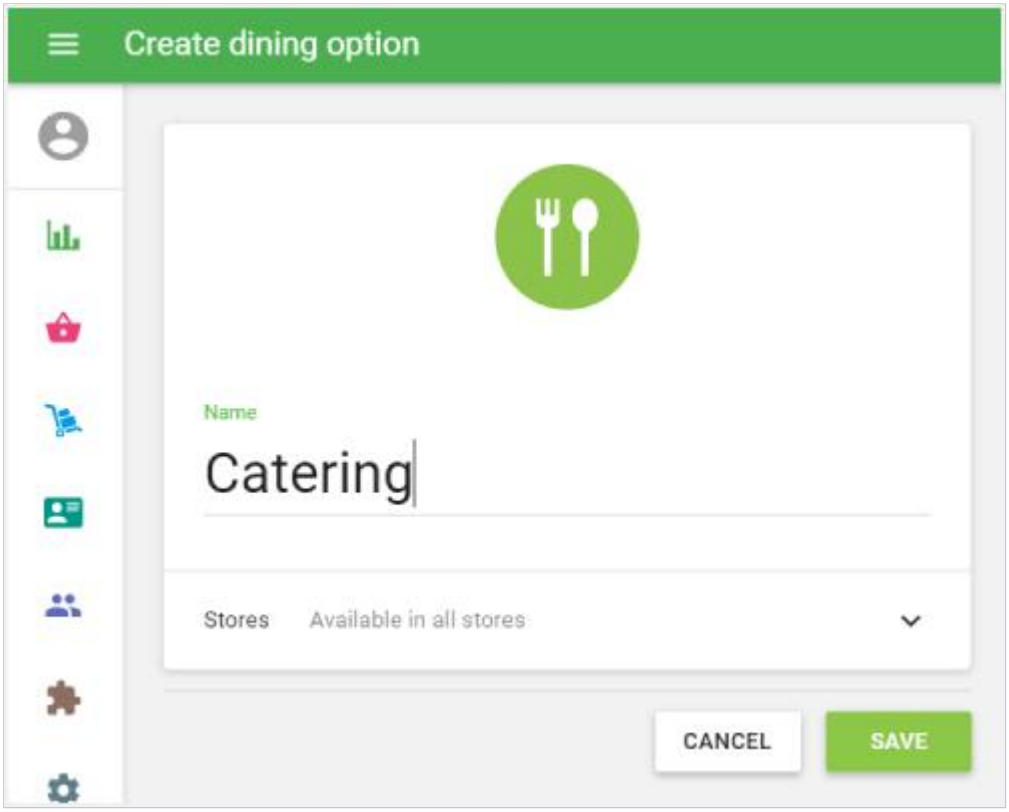
By default, you'll see three standard types:

- Dine in
- Takeout
- Delivery

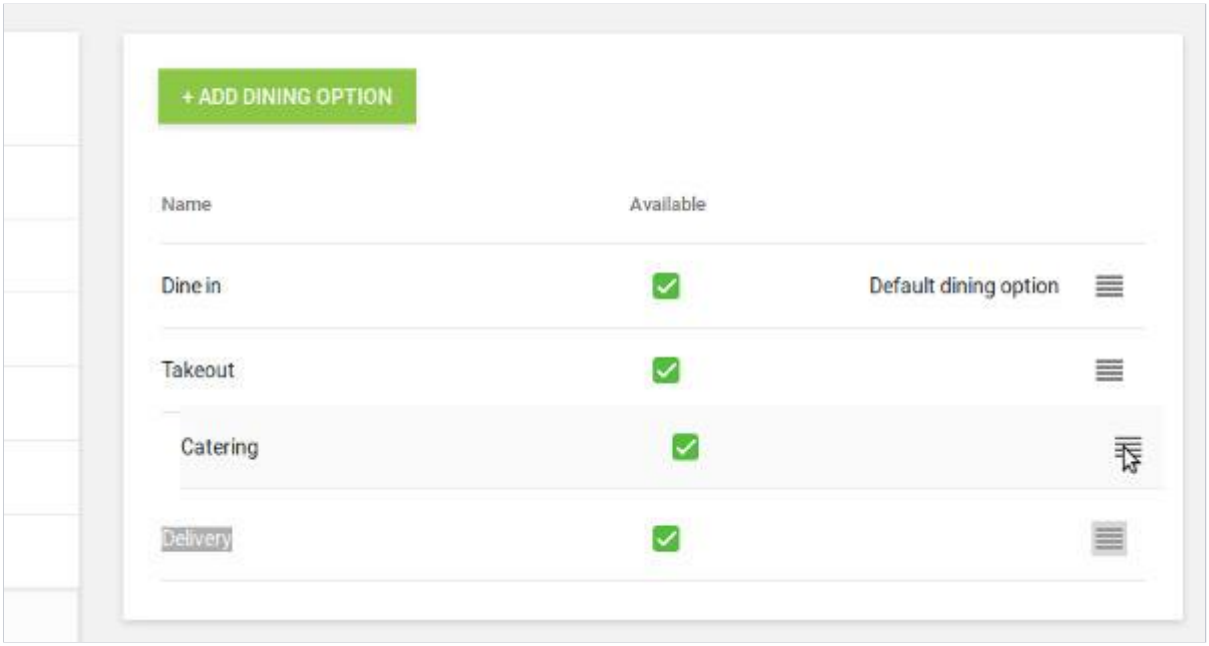


You can:

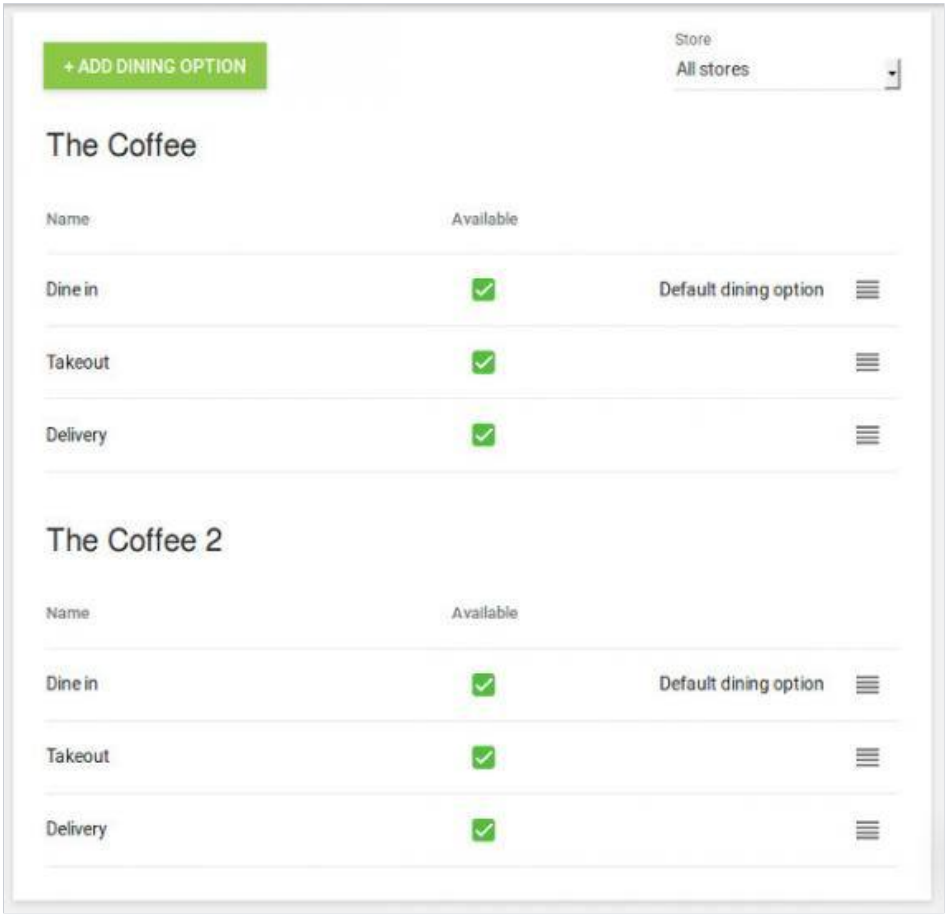
- **Edit** an existing option by clicking its name.
- **Create** new options with the '**Add dining option**' button.



- **Reorder** options by dragging the **icon with four horizontal lines** next to each dining option. The first in the list becomes the default during sales.



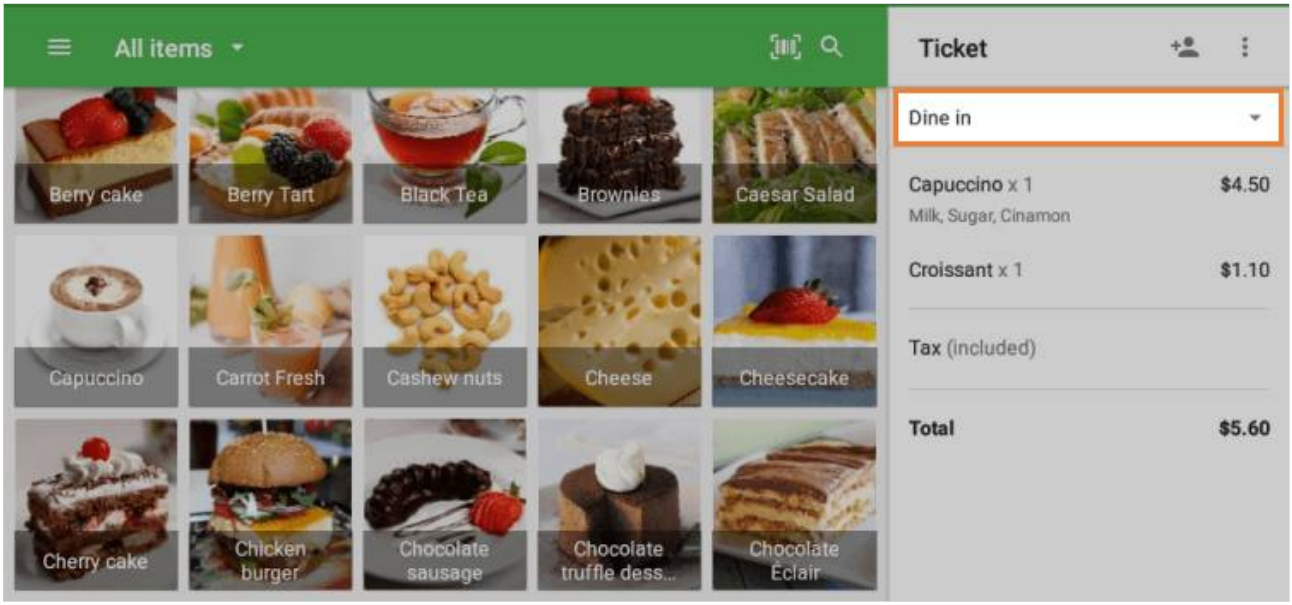
If your account includes **multiple stores**, you can configure dining options individually for each store.



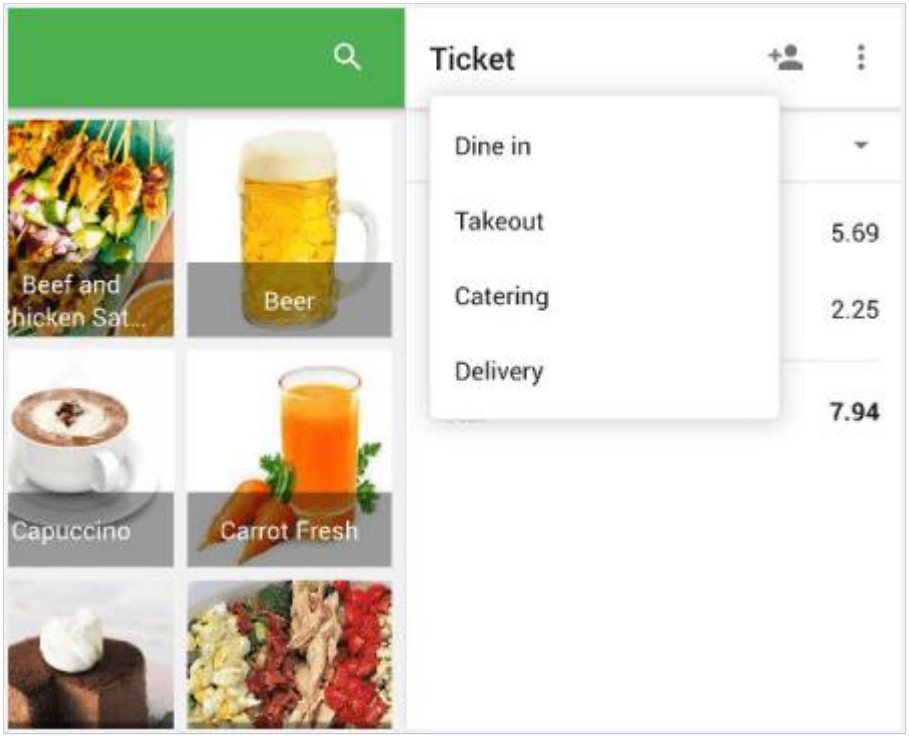
Don’t forget to click ‘**Save**’ after making changes.

Using Dining Options During a Sale

On the POS sale screen, after adding items to the ticket, tap the **dining option** line near the top.



Select the appropriate option from the dropdown list.



The selected dining option is stored with the sale and affects both visual display and tax application (if configured accordingly).

Where Dining Options Appear

Dining options are visible on:

- **Printed receipts**
- **Printed bills**
- **E-receipts** sent to customers
- **Receipts list** in the POS app and the Back Office
- **Kitchen Display System** (KDS) as well as on **tickets** when using kitchen printers
- **Customer Display System (CDS)**

Dining options improve internal workflow, customer service, and regulatory compliance for food service businesses.

See also:

How to Apply Taxes Depending on the Dining Options

How to sell liquids

Video
https://www.youtube.com/watch?v=hIWJBgJMOu4

There are two main ways to sell liquids in **Loyverse POS**, depending on how you measure and sell your products:

- Selling by **weight (volume)**
- Selling as **composite items**

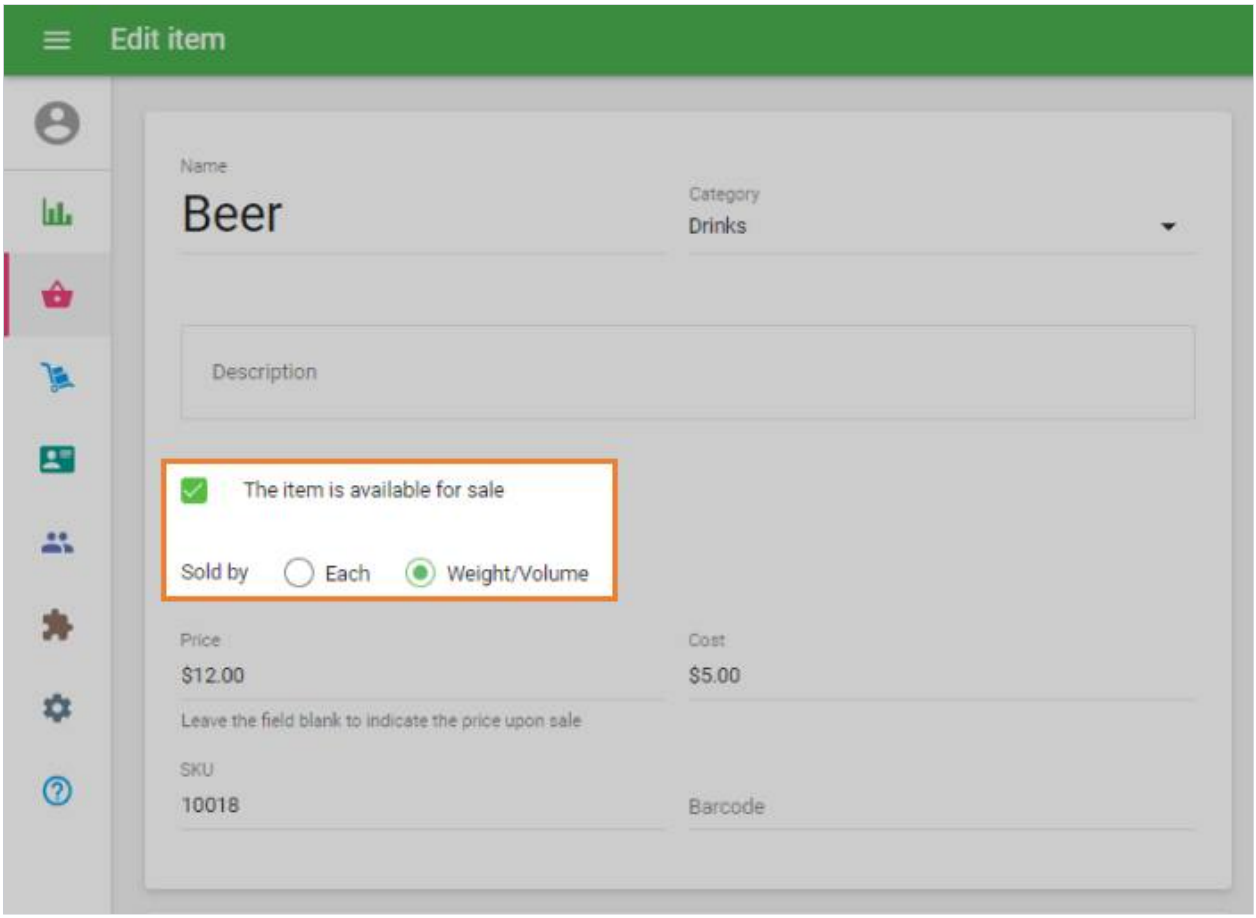
1. Selling by Weight (Volume)

This method is ideal when you sell liquids in **variable quantities** (for example, beer, wine, oil, or detergents sold by the liter or milliliter).

Step 1. Enable the "Sold by Weight" Option

Open your liquid item for editing in the **Back Office** or the **Loyverse POS app**.

Set the "**Sold by**" option to "**Weight**."



Enter the **price per unit of measure** (for example, per liter).

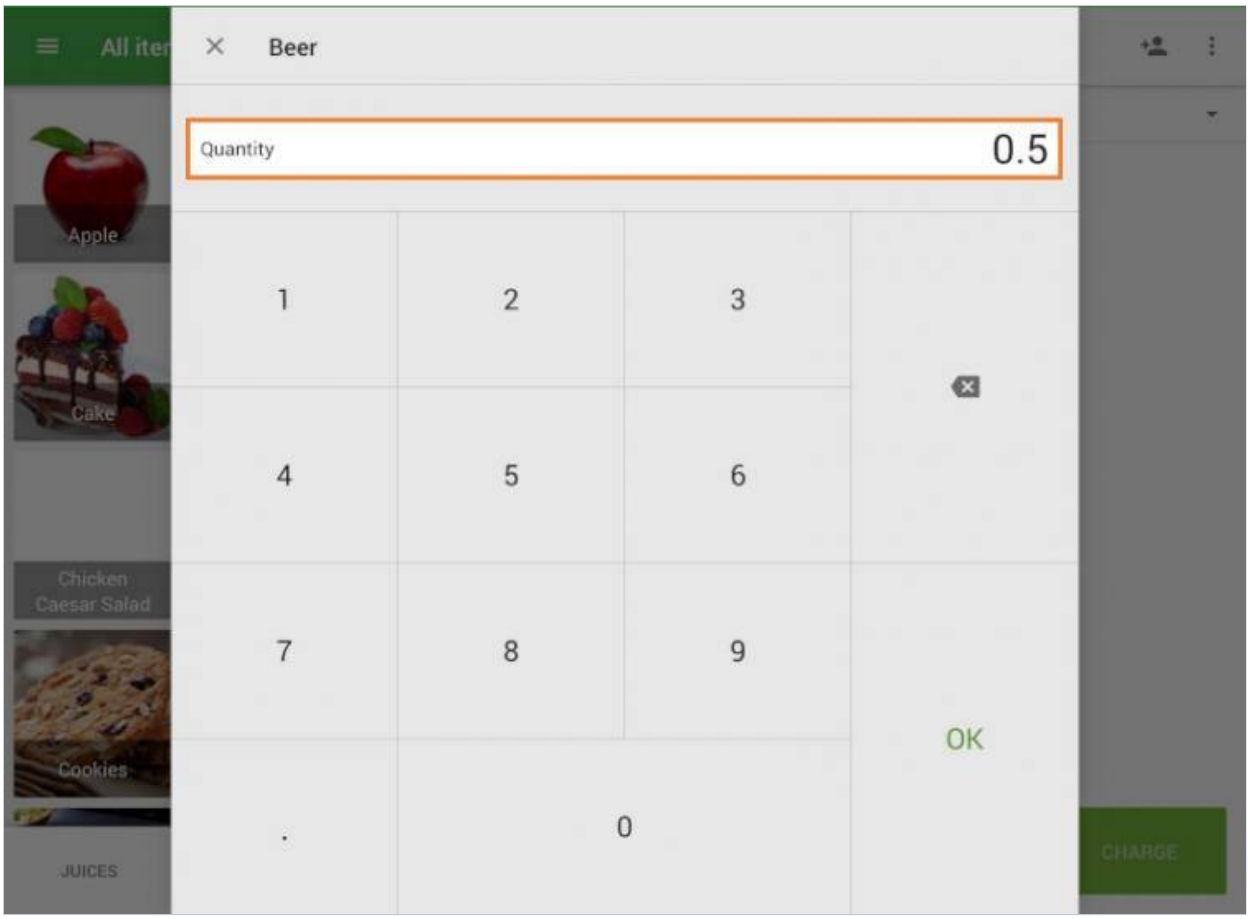
- You may include the unit of measure in the item name — for example, Beer 1L.

Save your changes.

Step 2. Selling the Item

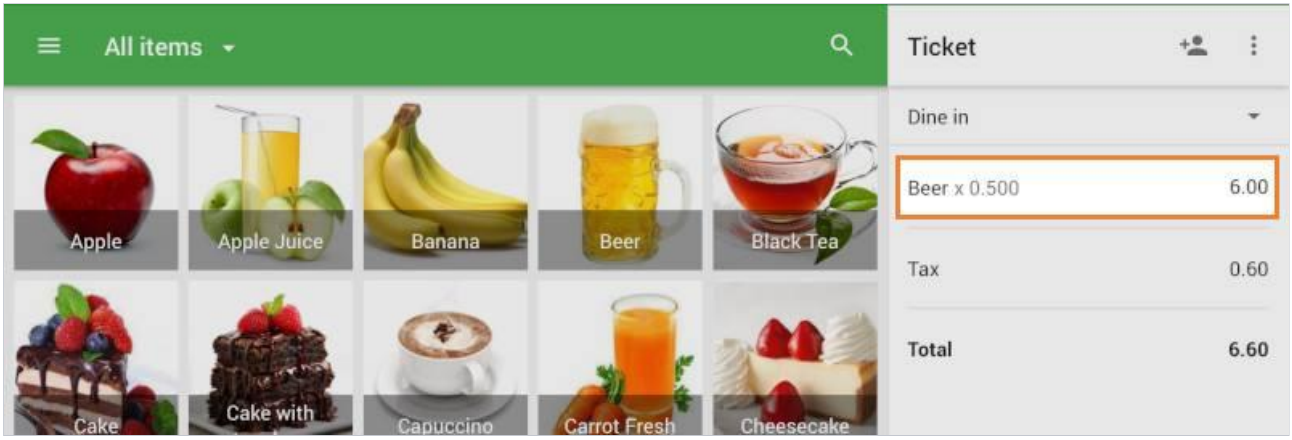
During a sale, tap on the item.

A number pad will appear. Enter the **quantity in proportion to the base measure**.



- For example, if your measure is one liter and you sell 500 ml, enter 0.5 in the Quantity field.

Tap **OK** to confirm.



The system will automatically calculate the item's price as:

Price per liter × actual quantity sold

If stock tracking is enabled, the corresponding amount will be **deducted from inventory**.

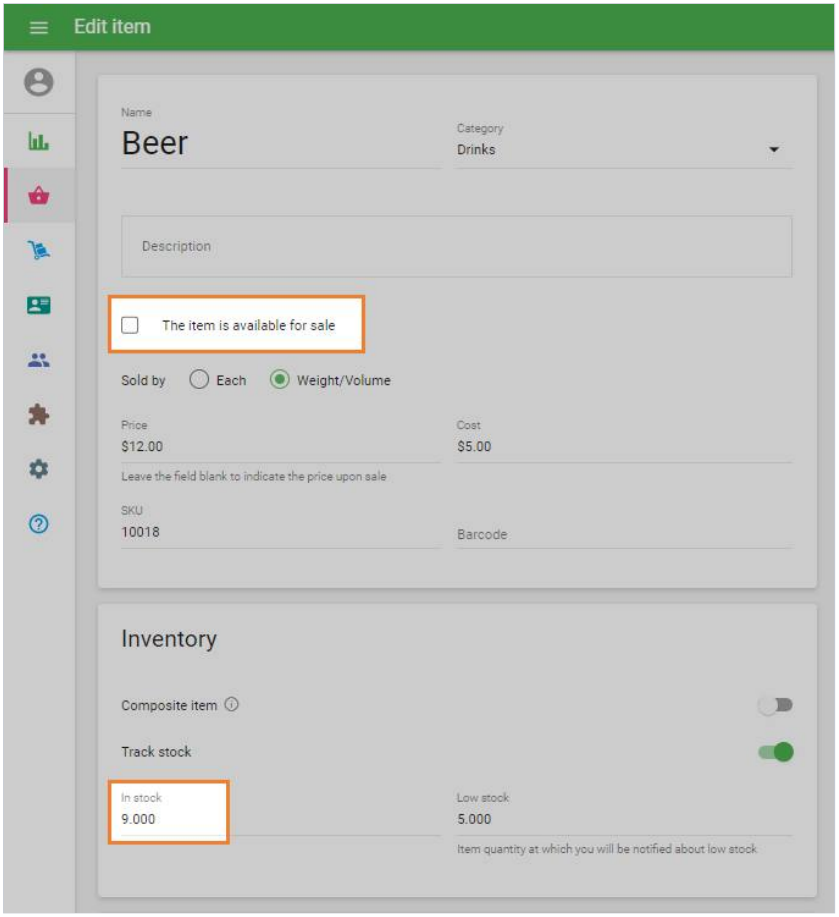
2. Selling as a Composite Item

This method is suitable when you sell liquids in fixed portion sizes, such as drinks served in shots, glasses, or pints.

Step 1. Create the Base (Component) Item

In the **Back Office**, go to the **Item list** and create the liquid item (for example, Beer).

Enter the **stock amount**.



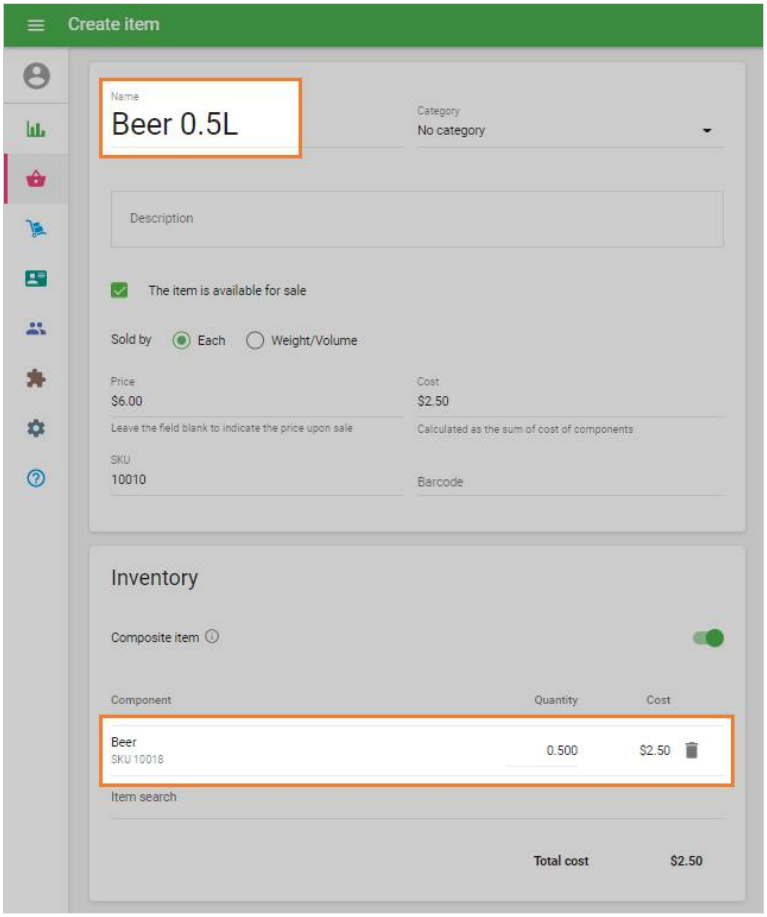
If you do not sell this item separately, **deselect** the checkbox "**The item is available for sale**" so it doesn't appear during regular sales.

Save the item.

Step 2. Create Composite Items for Each Volume

Create a new item (for example, Beer 0.5L).

Enable the "**Composite item**" option in the **Inventory** section.



Add your base liquid item (Beer) as a **component**.

In the **Quantity** field, specify the amount of liquid used for this item — e.g., **0.5 L.**

Save the item.

Now, every time you sell a Beer 0.5L item, the system will **automatically reduce the stock** of the base liquid item (Beer) by 0.5 liters.

Loyverse POS allows you to sell liquids efficiently — whether by variable quantities or predefined portion sizes — while maintaining accurate stock control for your liquid inventory.

See also:

How to Create a Composite Item

How to Make Sales

How to Sell Items by Weight

Sale Screen

How to Arrange Sale Screen in Loyverse POS

Video
https://www.youtube.com/watch?v=Fscqq9bOlSk

Loyverse POS allows you to customize the sales screen on **tablet devices** by creating custom pages and organizing items, categories, and discounts for quick and convenient access.
Note: This feature is only available in the Loyverse POS app installed on **tablet devices**. On smartphones, the sales screen uses a different feature called **Favorites**, which lets you mark frequently used items for easier access.

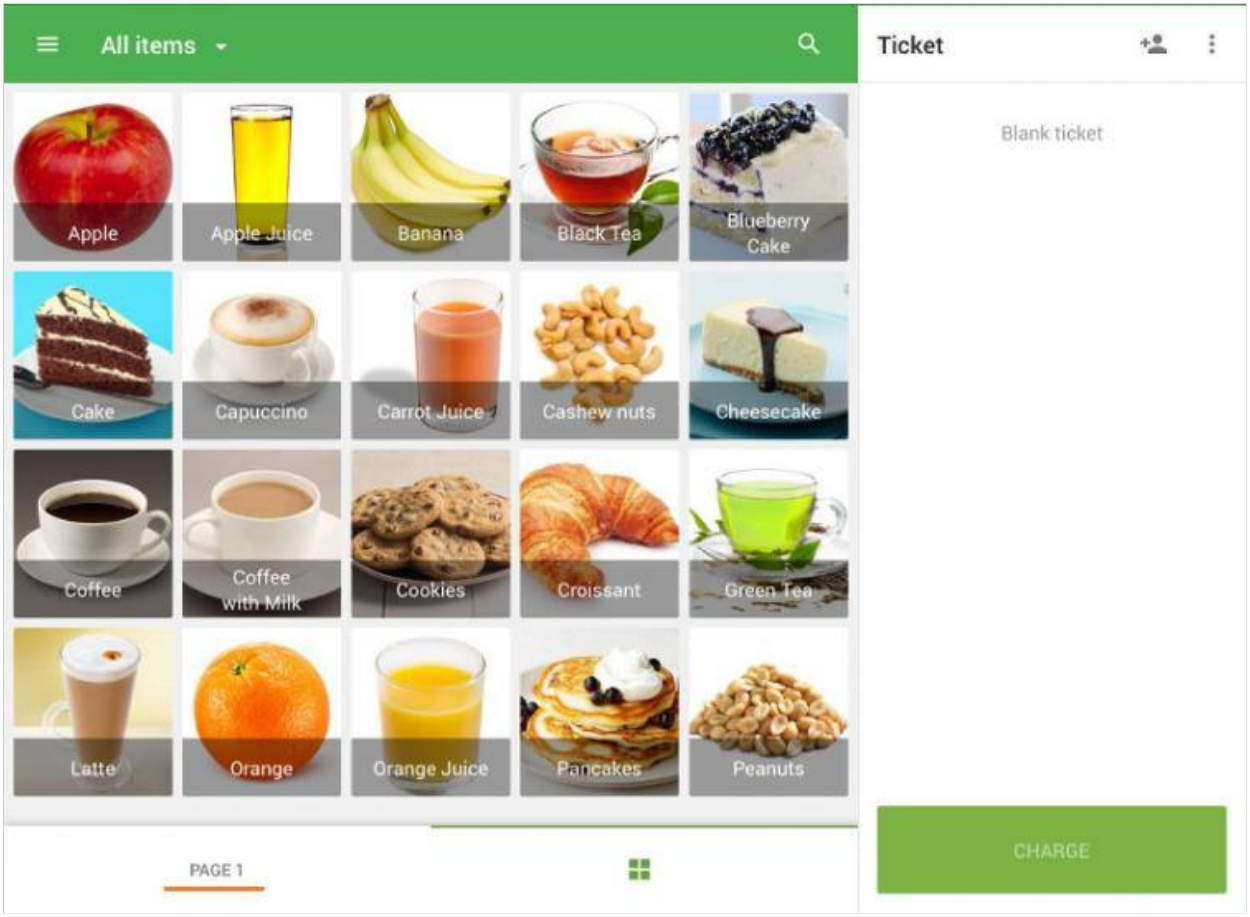
Default and Custom Pages on Tablets

The **default page** (marked by a grid icon) displays all items in alphabetical order and cannot be customized.

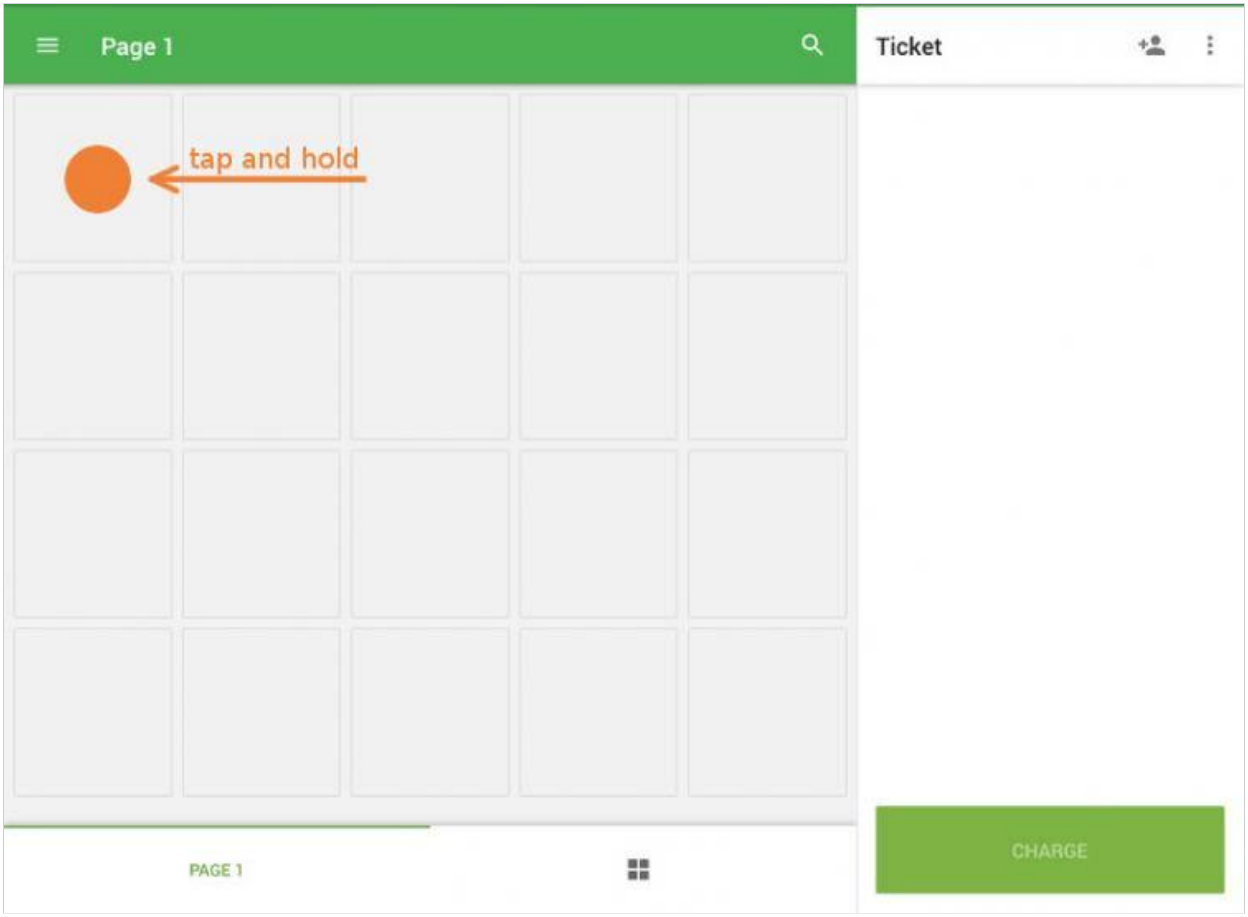
You can create additional **custom pages** (e.g., “Page 1”, “Page 2”) to arrange items however you like.

Organizing Items on a Custom Page

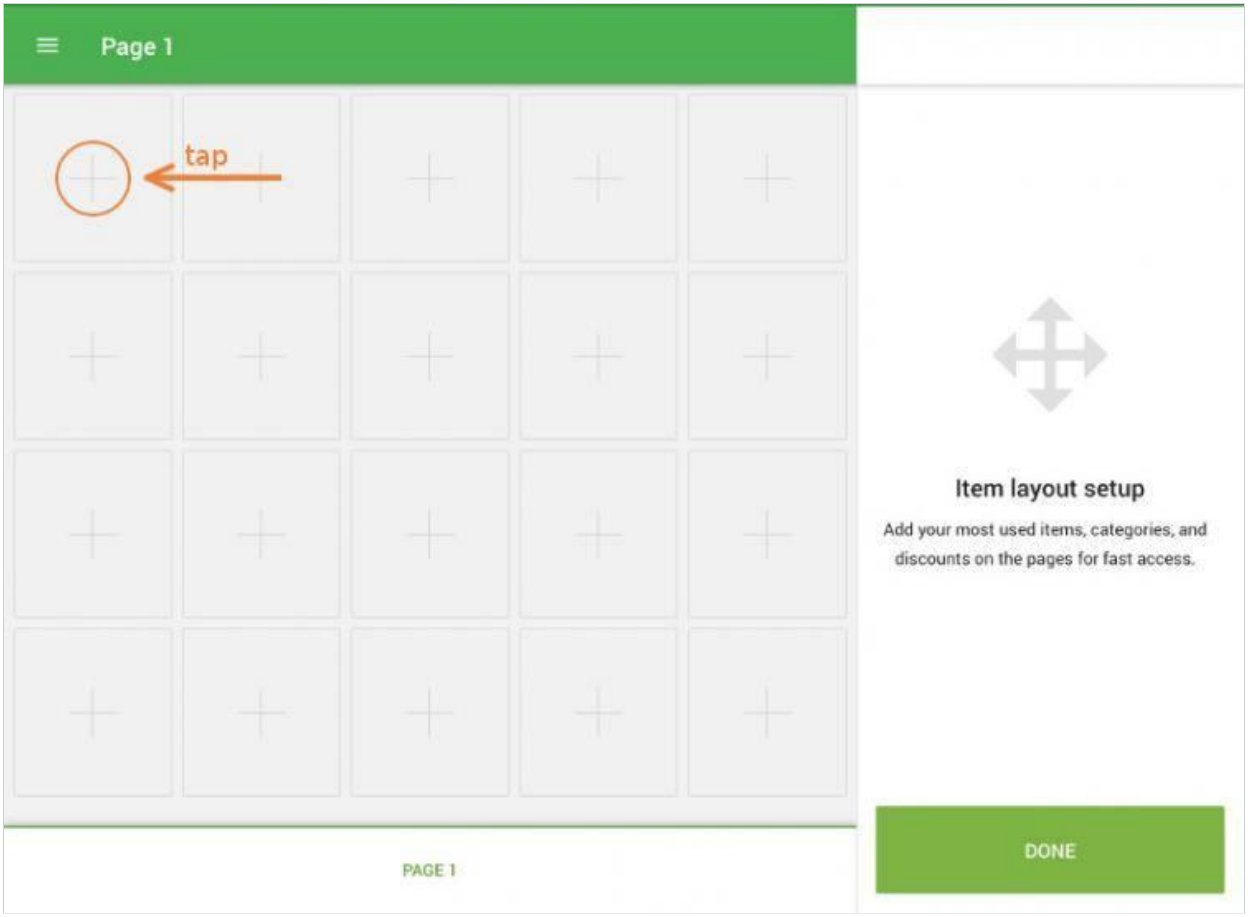
Open the **sales screen** and go to a custom page like ‘**Page 1**’.



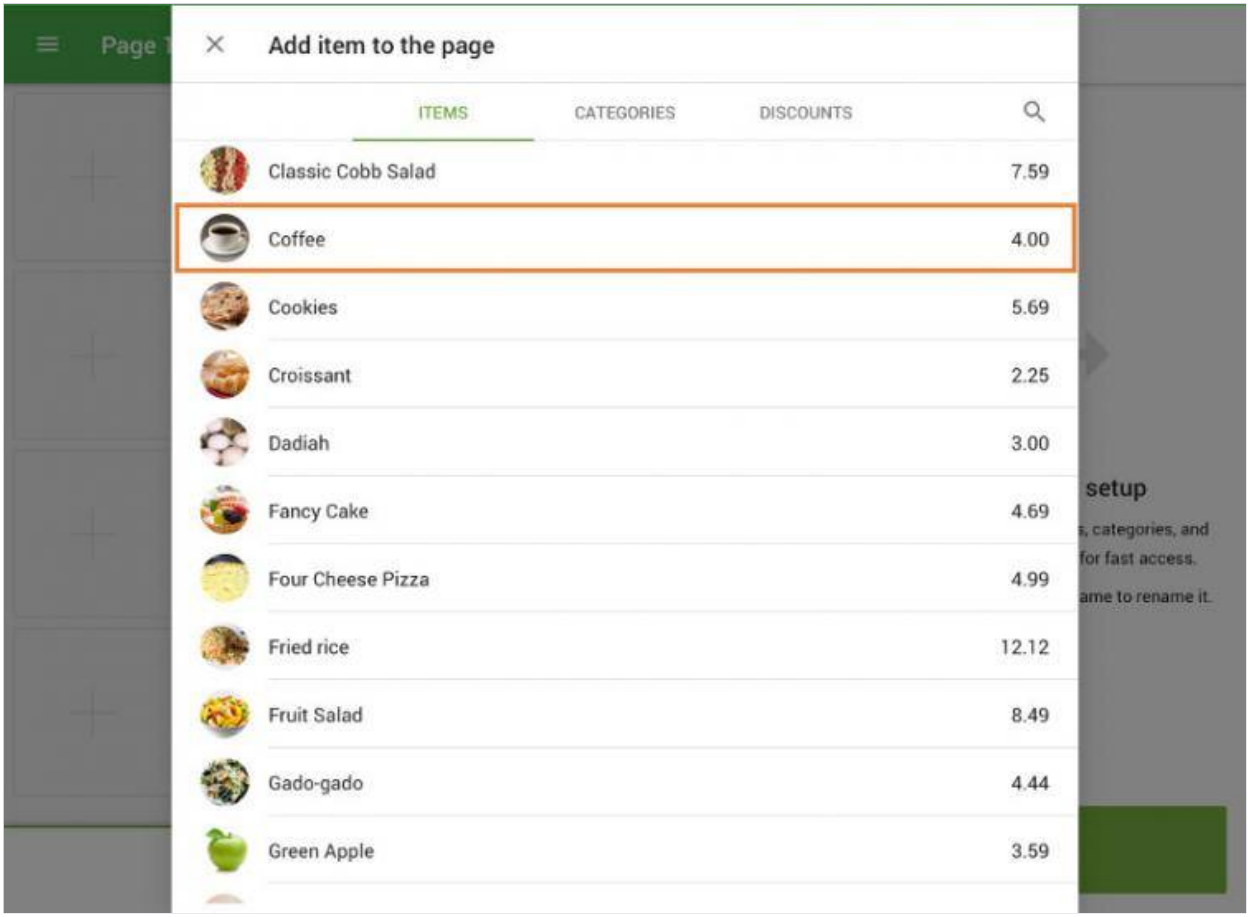
Tap and hold an empty square to enter '**Item layout setup**' mode.



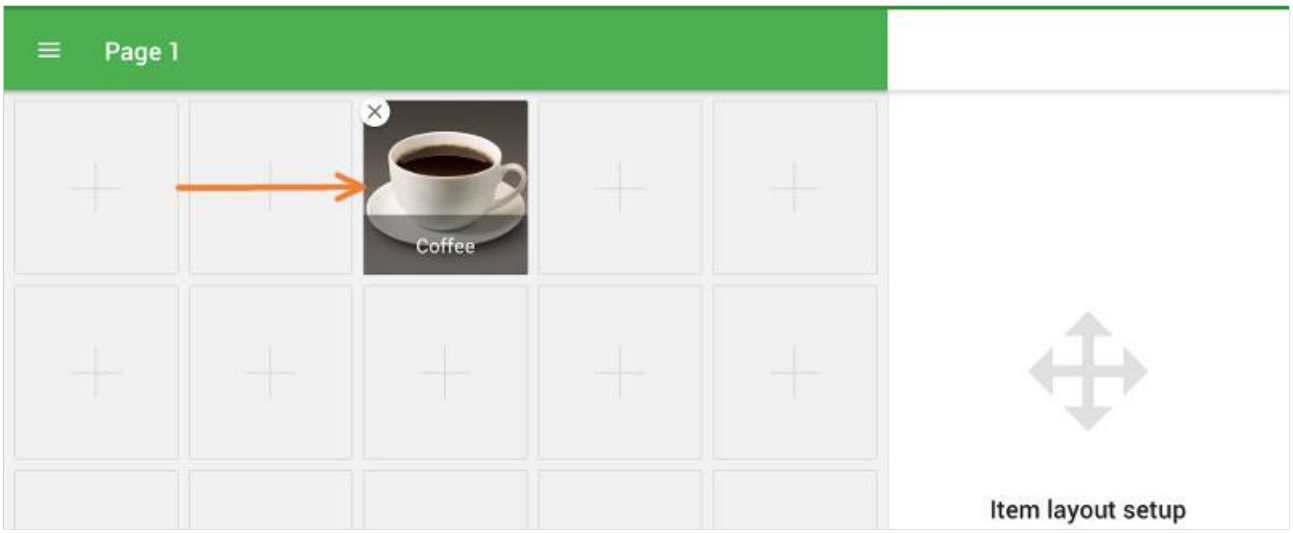
Tap any square with a '**+' sign** to open the item list.



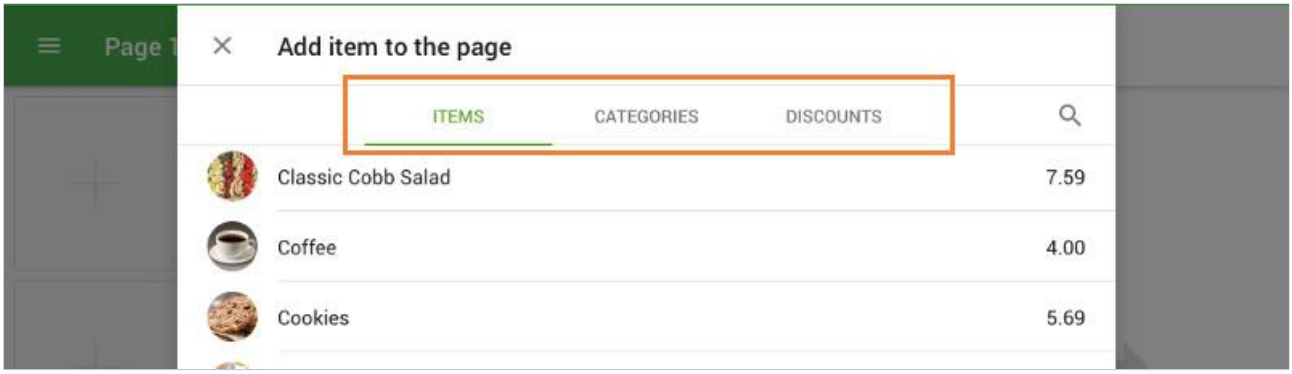
Choose an item to place in that square.



Drag and drop items to rearrange them as needed.



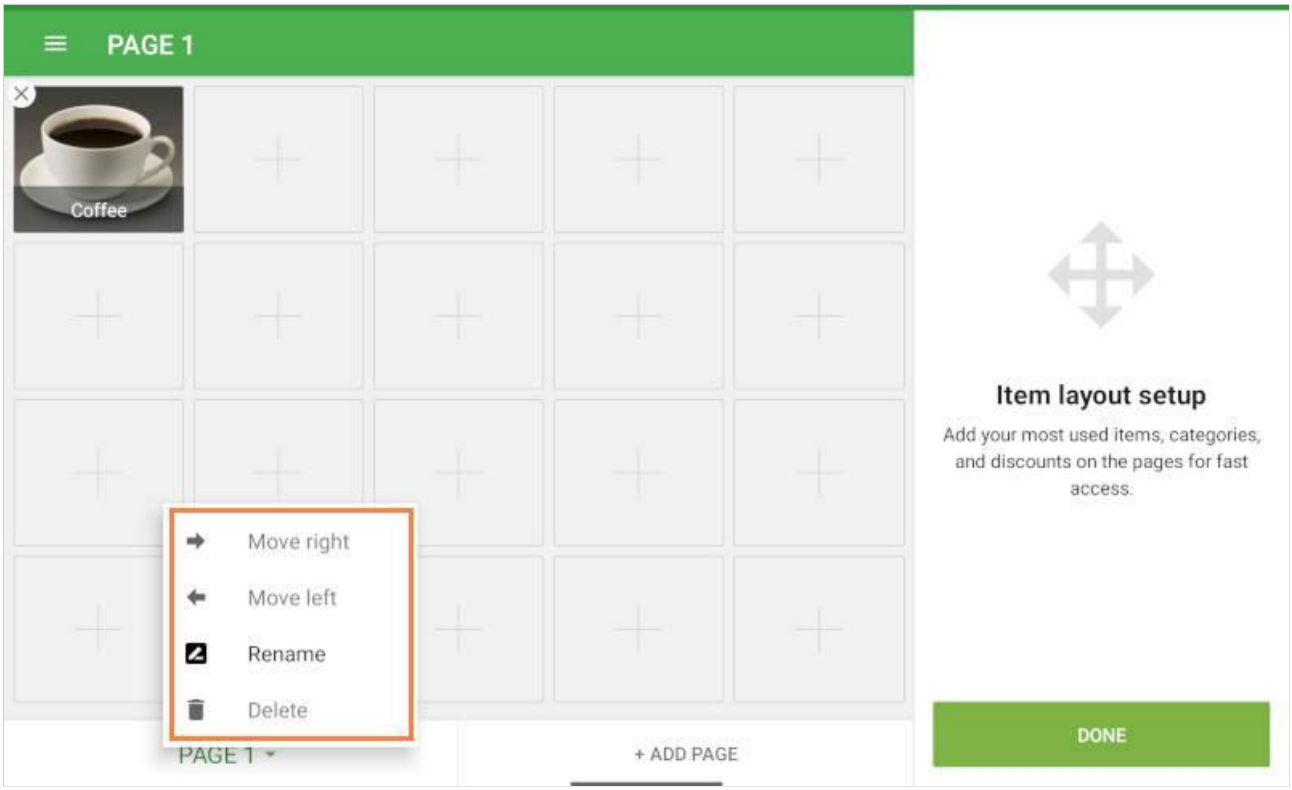
You can also add **Categories** and **Discounts** using the same method.



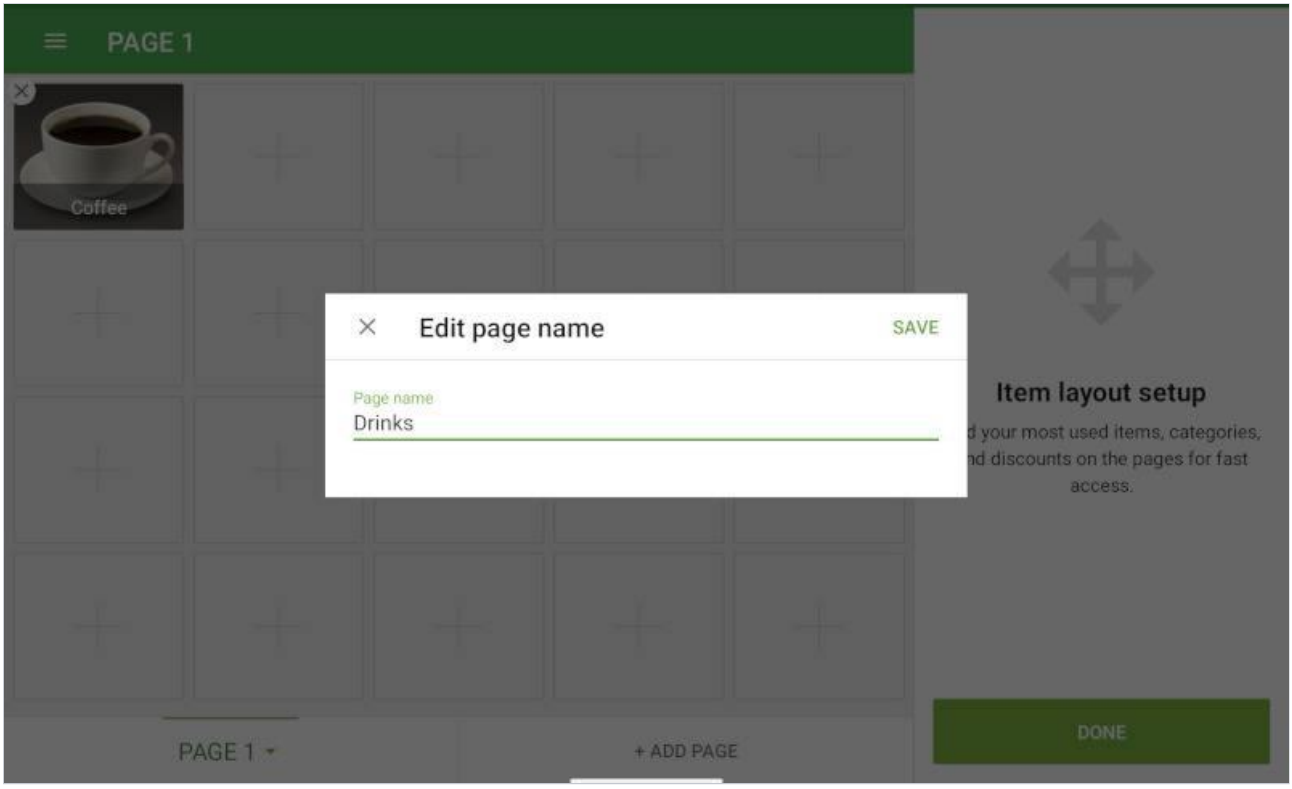
Managing Pages

In the '**Item layout setup**' mode, you can manage the tabs (pages) more flexibly. Tap on the name of the **active tab** to open a menu with available actions:

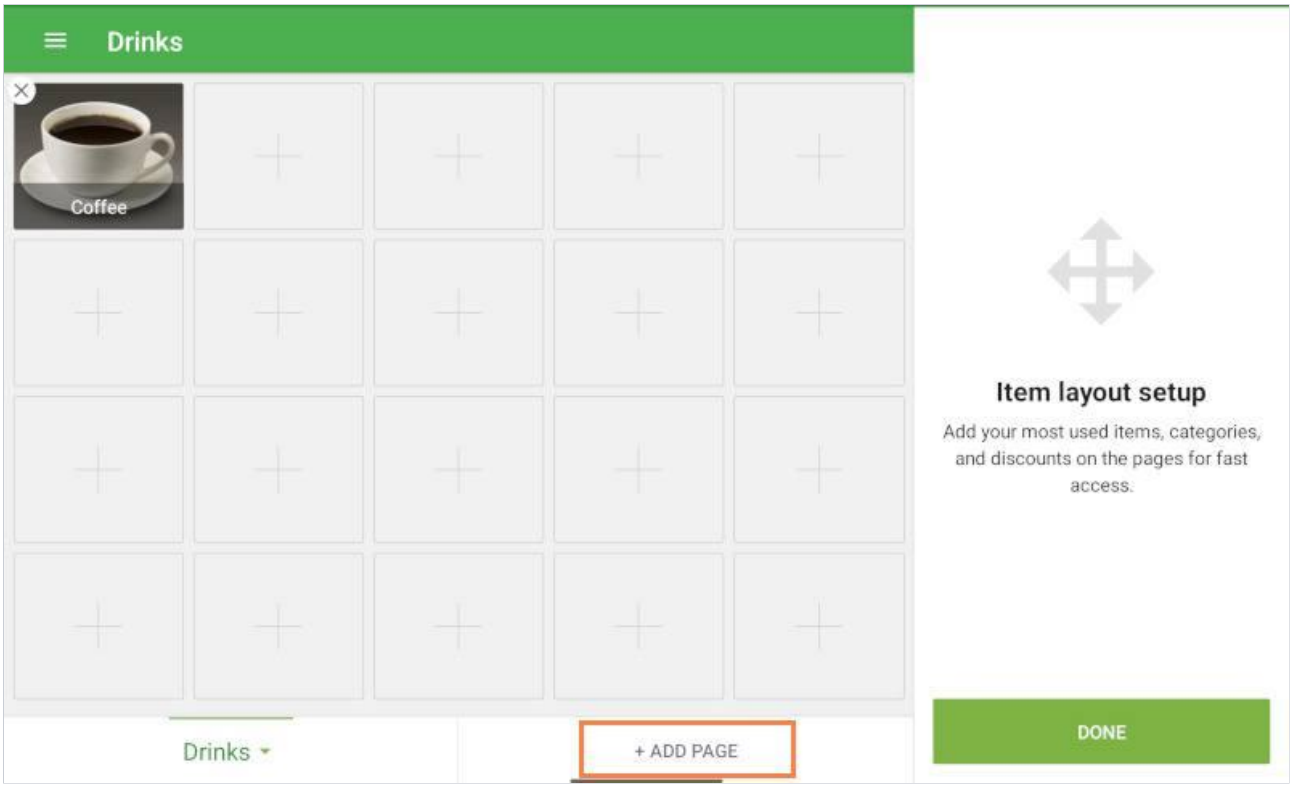
- Move right
- Move left
- Rename
- Delete



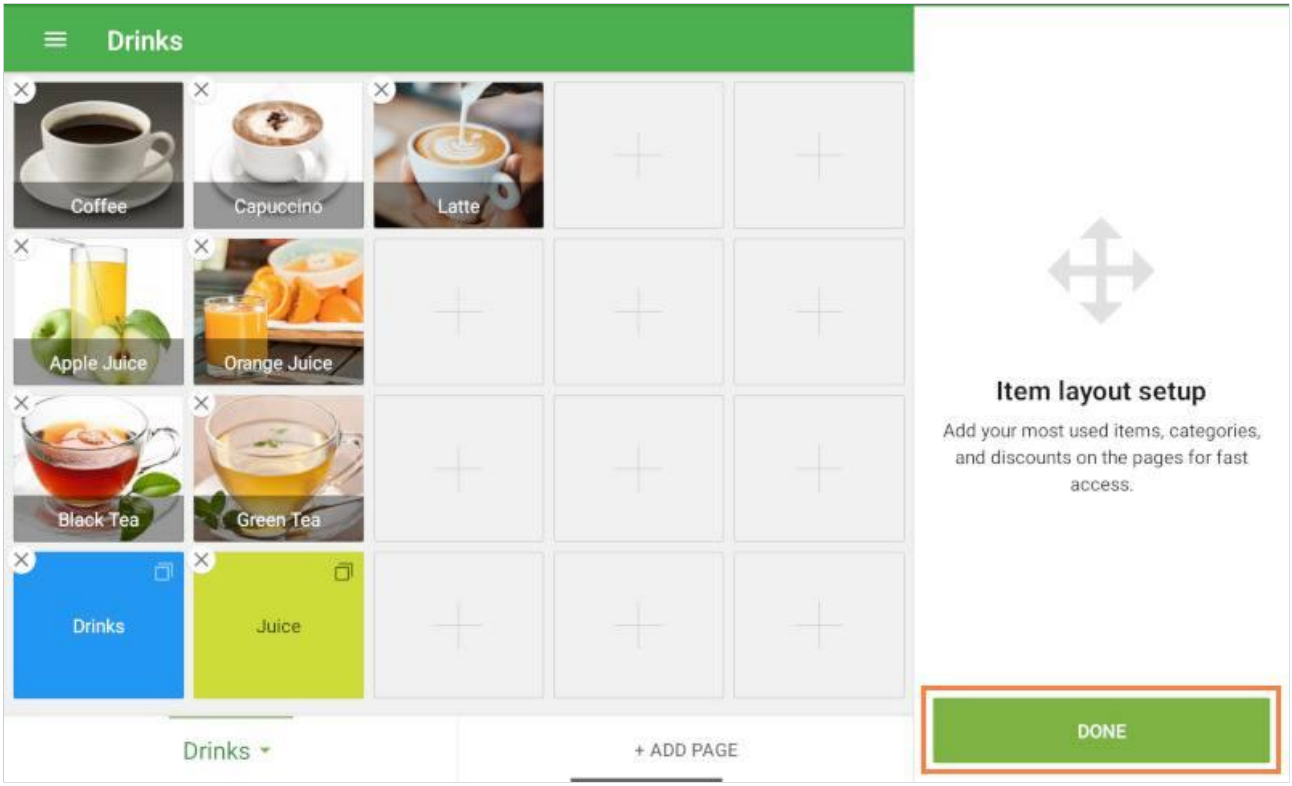
To **rename** a page, enter the new name in the pop-up window and tap 'Save'.



To **create a new page**, tap the '**Add Page**' button at the far right of the page tabs.

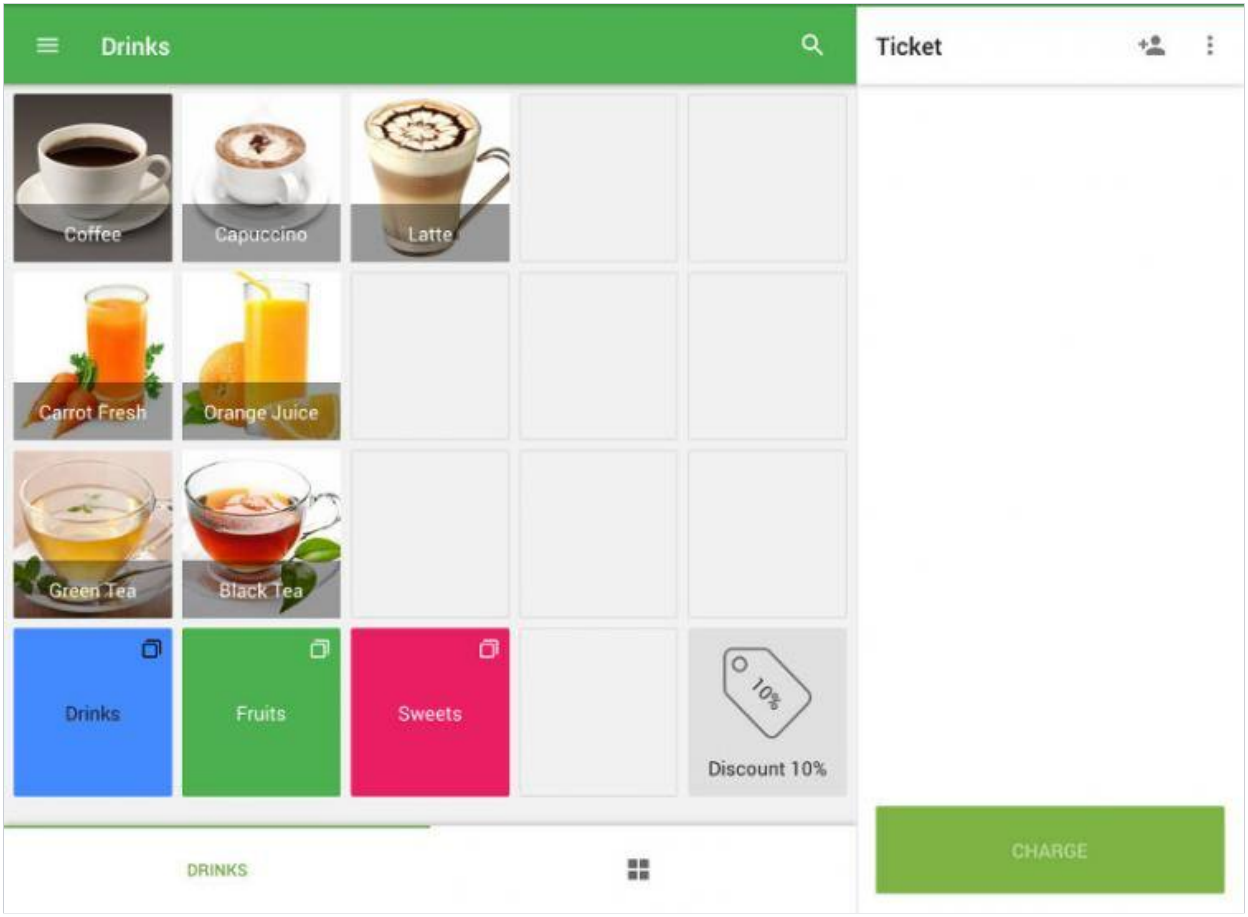


After arranging your layout, tap '**Done**' to save changes and return to the normal sales screen.



How It Works

After setup, simply tap items from your custom pages to add them to the ticket. This speeds up sales, especially for commonly purchased items.



Synchronization Across Devices

Layouts created on one tablet will **automatically sync** to all other POS devices (tablets only) in the same store.

See also:

How to Use Favorites on the Sale Screen of Smartphones

Receipts List in the POS

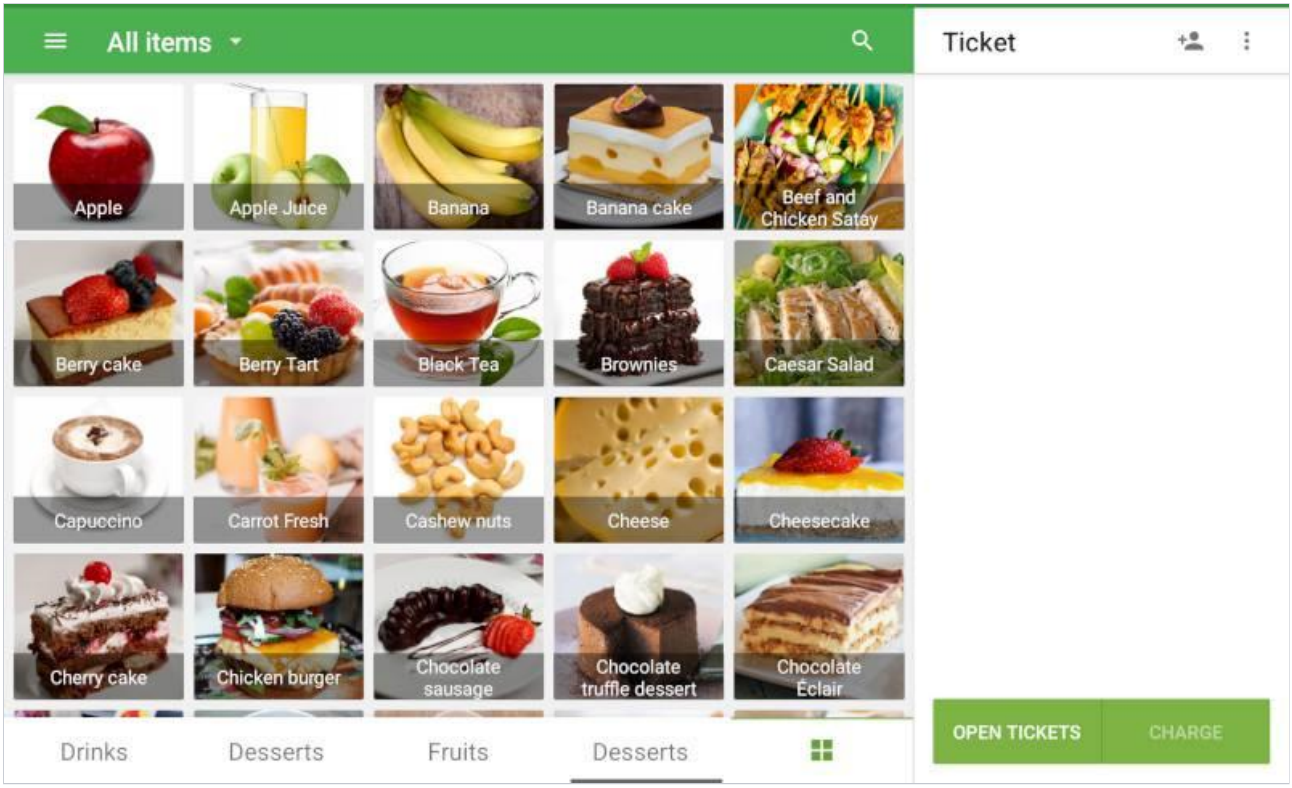
Information about the Customer and Notes in the Receipt

How to Change Home Sale Screen Layout

Customize the layout of your home sale screen—grid or list—to suit your device and workflow. Whether you're using a tablet or smartphone, you can switch views for easier item browsing and quicker checkout.

1. Tablet Layout

By default, tablets display items in a **grid**. This view shows item images in multiple columns, helping you quickly recognize products visually.

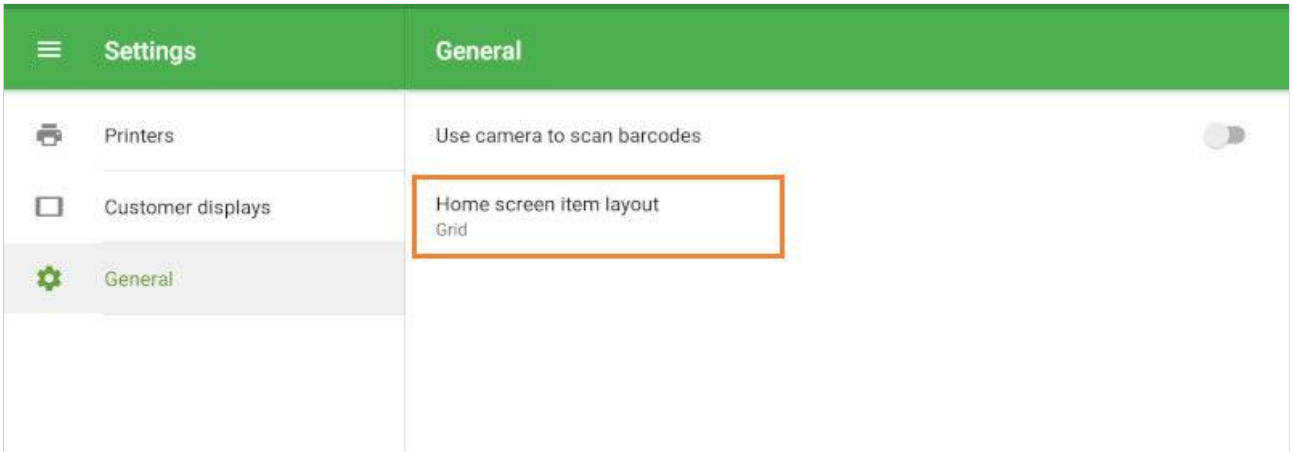


How to Switch to List View

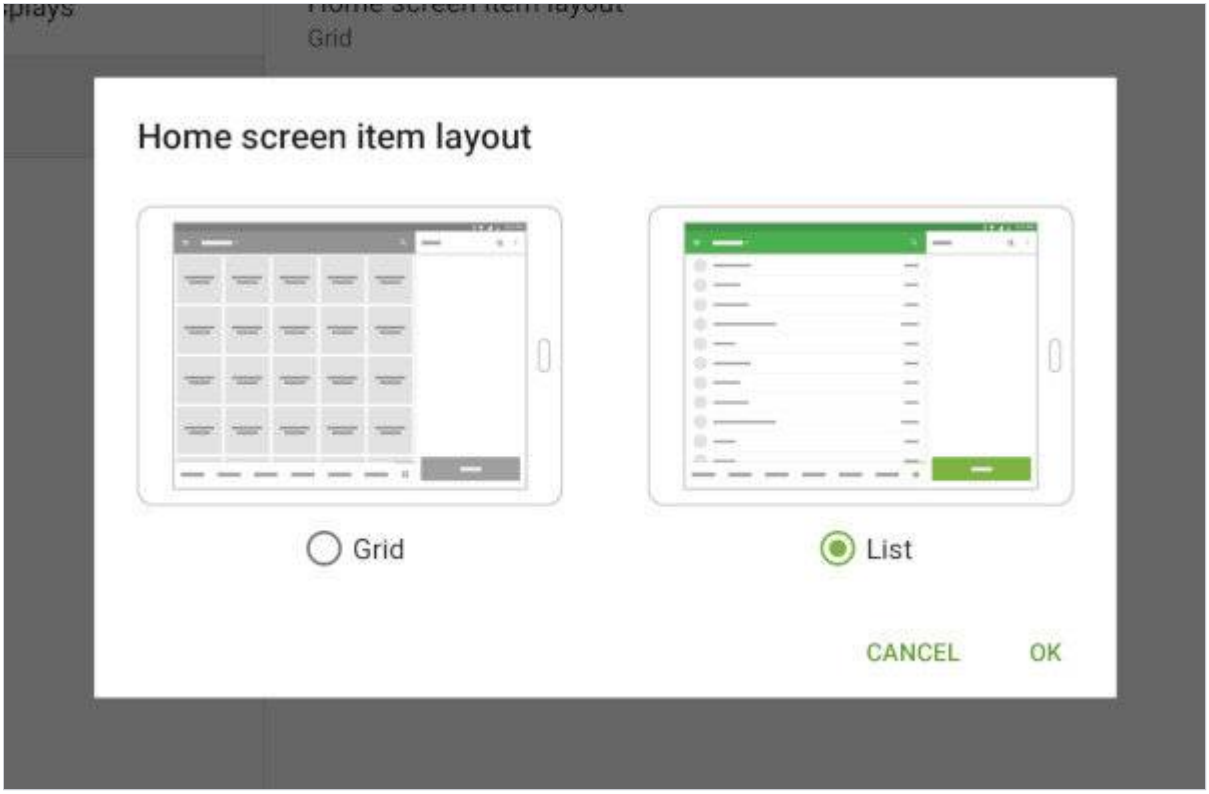
Open the Loyverse POS app on your tablet.

Tap ☰ **Menu** (top left) and select **Settings > General**.

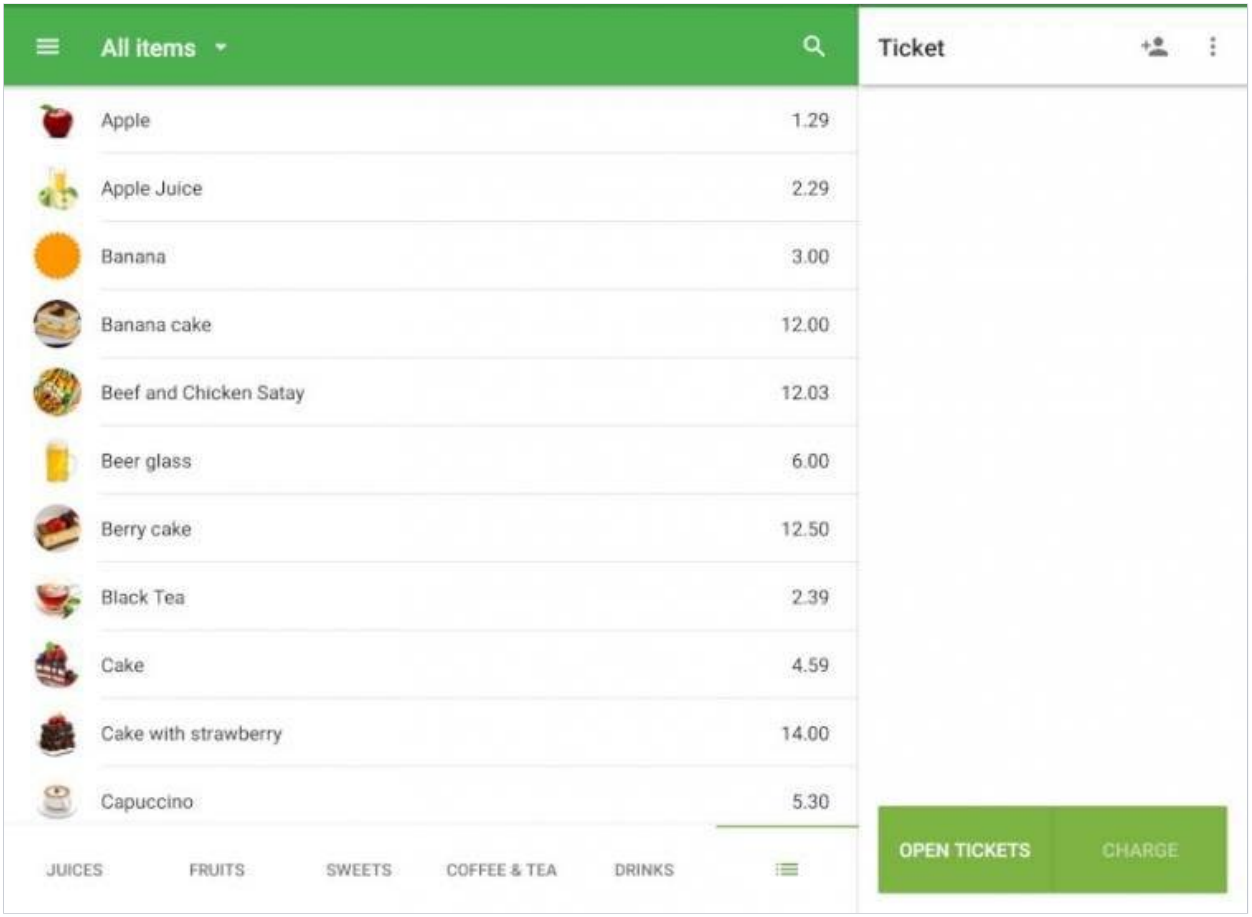
Tap **Home screen item layout**.



Choose **List**, then tap **Save**.



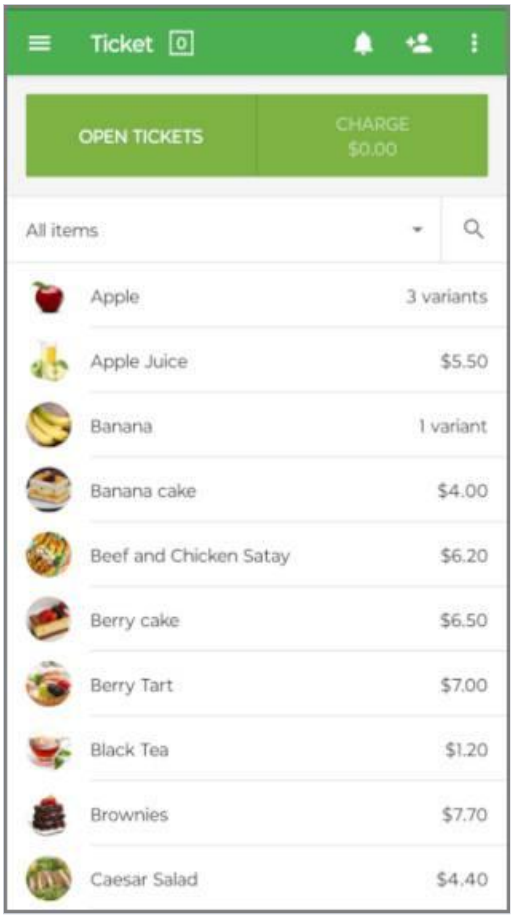
List View places items in a single column, showing full names and prices—ideal for items with long titles or when you need to confirm pricing at a glance.



Note: Any custom pages (e.g., shortcuts or favorites) remain in grid view regardless of this setting.

2. Smartphone Layout

On smartphones, the default is a **list** view—useful on smaller screens to read item names.

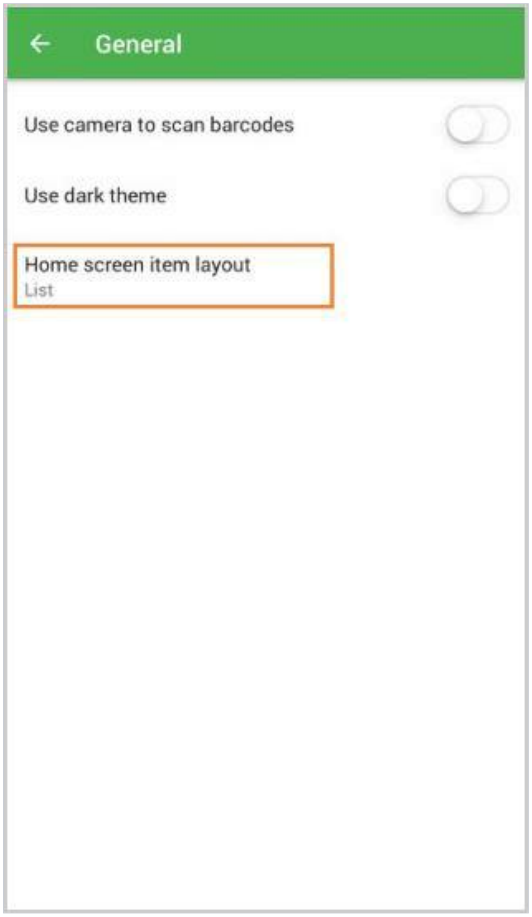


How to Switch to Grid View

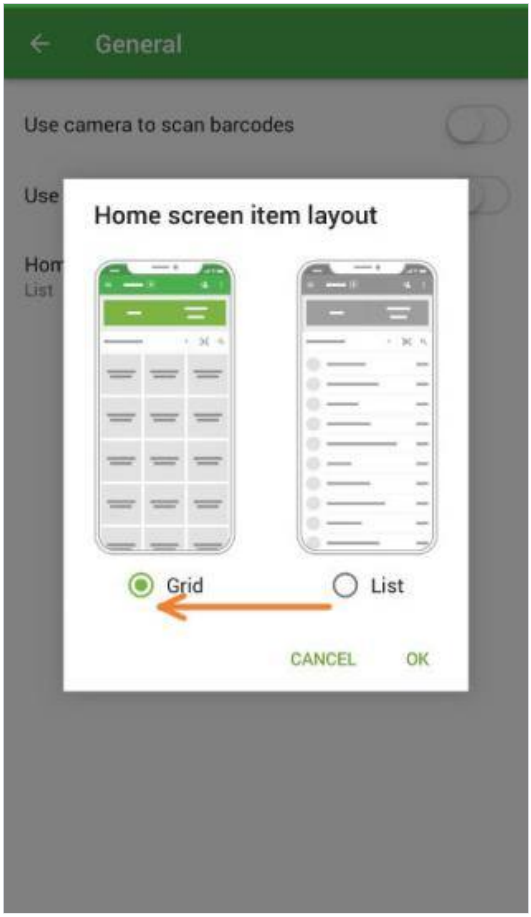
Open the Loyverse POS app on your smartphone.

Tap ☰ **Menu** and go to **Settings > General**.

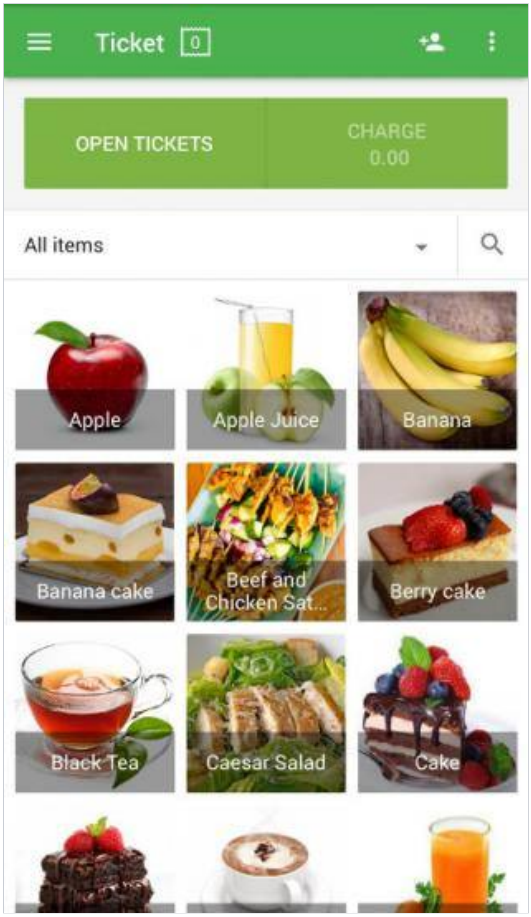
Tap **Home screen item layout**.



Select **Grid**, then tap **Save**.



Grid View displays items in three columns, emphasizing images and colors—perfect when you recognize products visually or want a compact layout.



3. Choosing the Right Layout

Grid Layout

- Best when you rely on visuals (photos or icons).
- Fits more products on screen at once.

List Layout

- Best when item names are long or you need to see prices without extra taps.
- Provides more descriptive space per item.

You can switch back and forth at any time to find the layout that speeds up your sales process. Enjoy a POS experience tailored to your device and selling style!

See also:

How to Arrange Sale Screen in Loyverse POS

How to Use Favorites on the Sale Screen of Smartphones

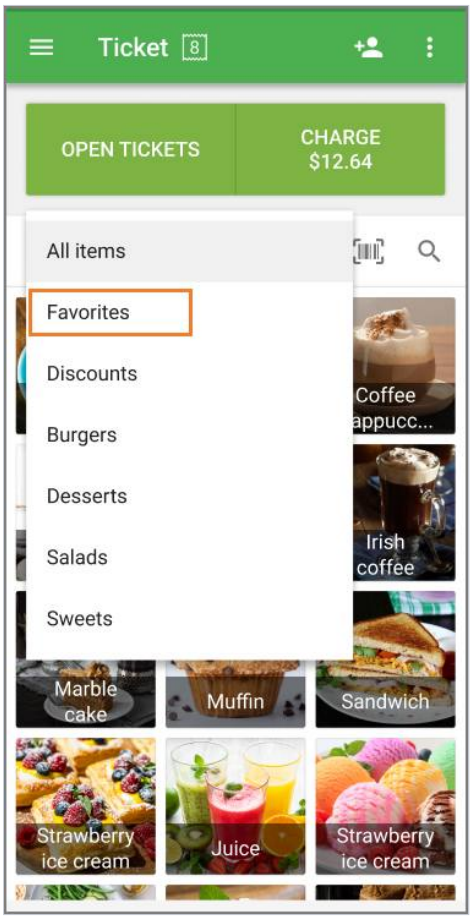
The **Favorites** feature in Loyverse POS on smartphones allows you to create a quick-access list of popular items, making sales faster and more efficient.

Note: This feature is only available in the Loyverse POS app installed on **smartphones**.
On tablets, you can customize the sales screen by creating custom pages and organizing items, categories, and discounts.

Setting Up Favorites

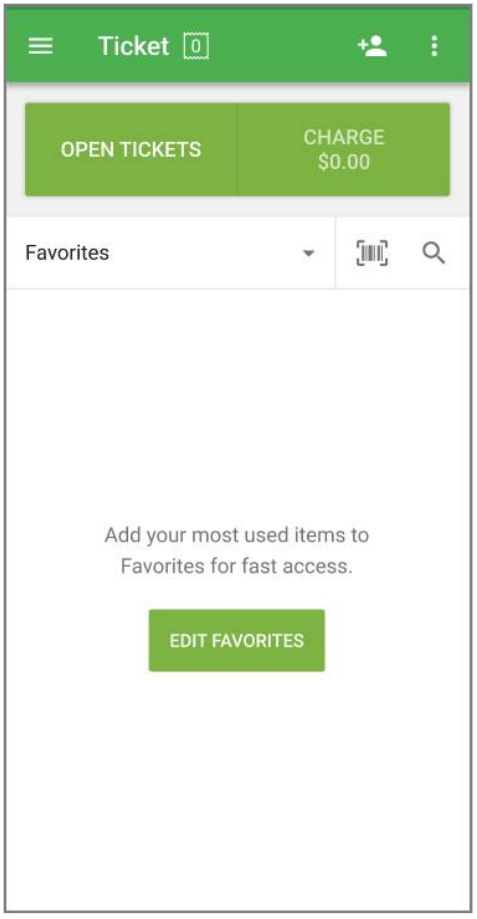
1. **Open the Favorites list**

On the sale screen, tap the '**All items**' drop-down menu and select '**Favorites**'.



2. **Enter edit mode**

Tap the '**Edit favorites**' button.

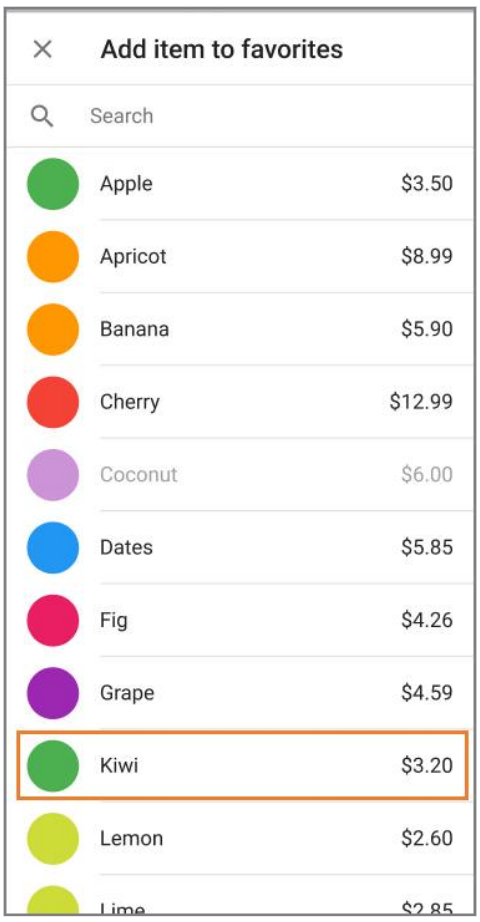


3. **Add items**

Tap the **plus (+)** button to add items to the favorites list.



Select the desired item from the list of all items.



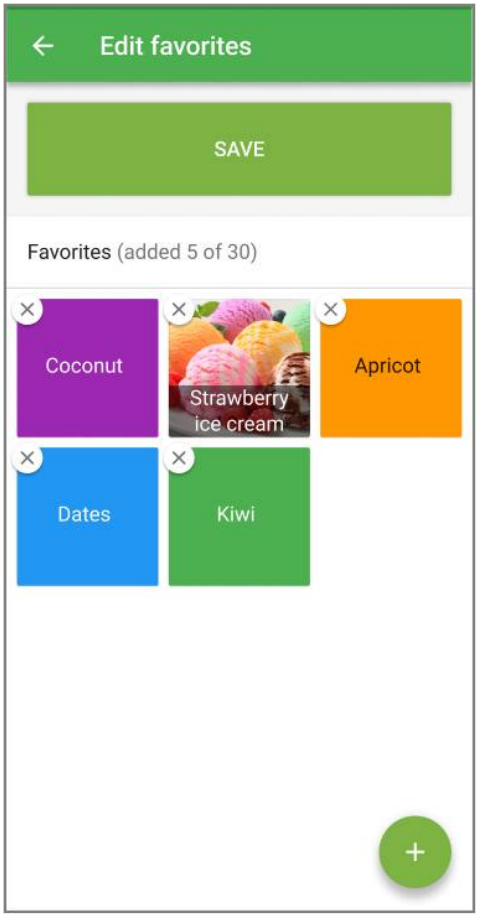
4. **Arrange items**

Drag and drop items to change their order.

Tip: The maximum number of favorite items is **30**.

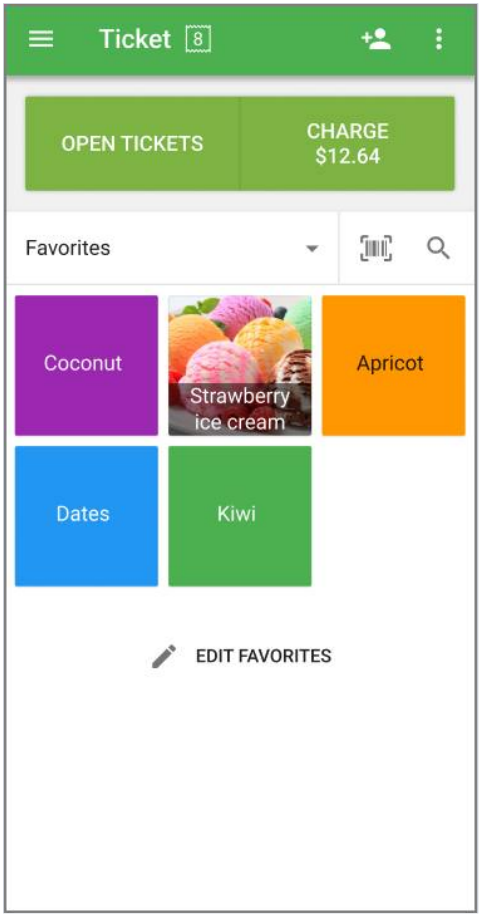
5. **Save changes**

Tap the '**Save**' button to finalize your favorites list.



Using Favorites During Sales

When selling, simply tap an item from the **Favorites** list to add it directly to the ticket—no need to browse through all categories.



Synchronization Across Devices

All favorites are automatically synchronized across all POS smartphones within the same store.

See also:

[How to Arrange Sale Screen in Loyverse POS]

Receipts & Bills

How to Print Bill

Video
https://www.youtube.com/watch?v=njemZxYre_g

Printing a bill (also known as a pro forma receipt) allows you to give customers a preview of their total before finalizing the sale. This is especially useful in restaurants, cafes, or any business where the customer may review their order before payment.

Before You Start

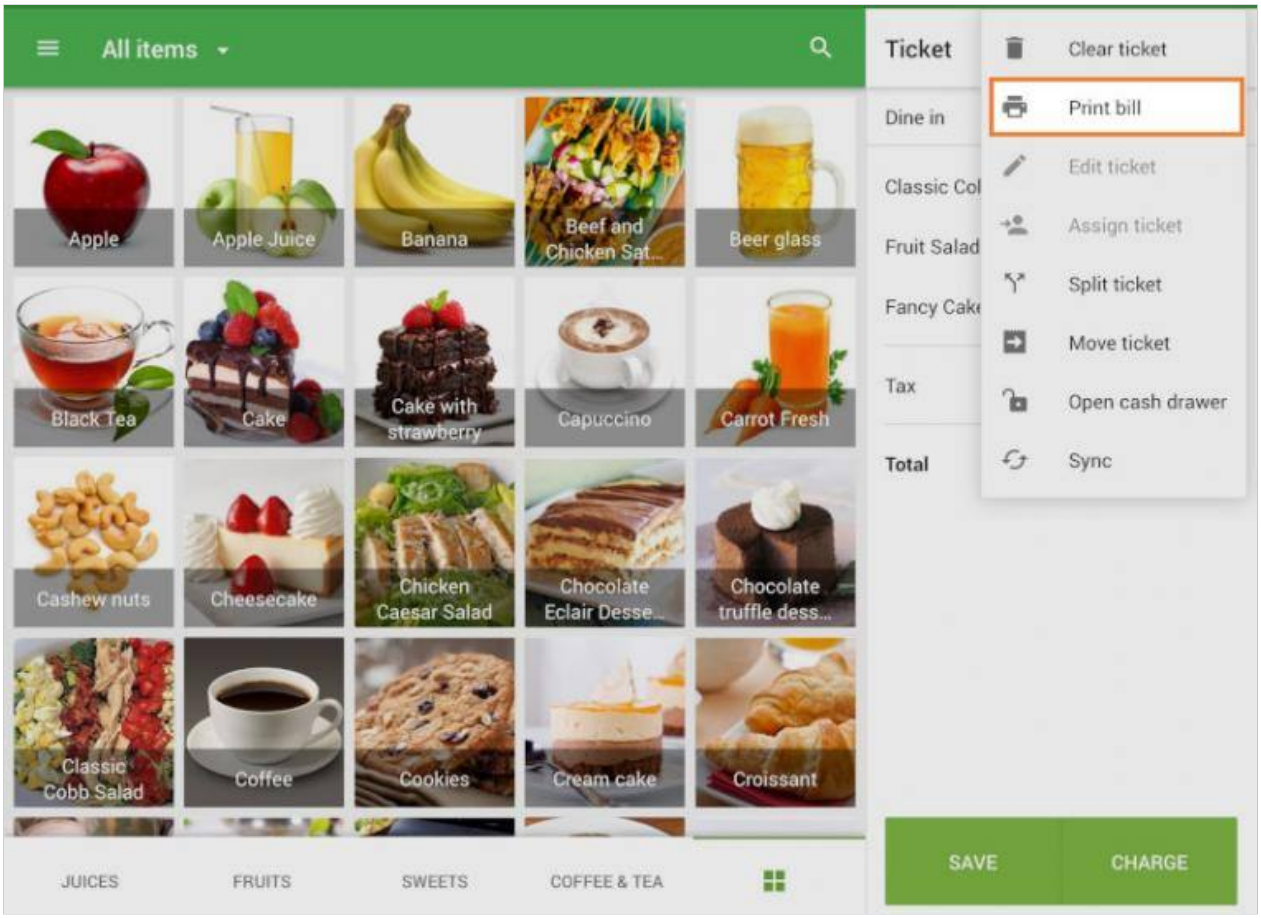
To enable bill printing, ensure the following:
The '**Open tickets**' feature is activated.
→ Go to **Back Office** > **Settings** > **Features**, and toggle '**Open tickets**' to ON.
A **receipt printer** is connected and properly paired with your Loyverse POS device.

Steps to Print a Bill

Launch the Loyverse POS app and start creating a sale.

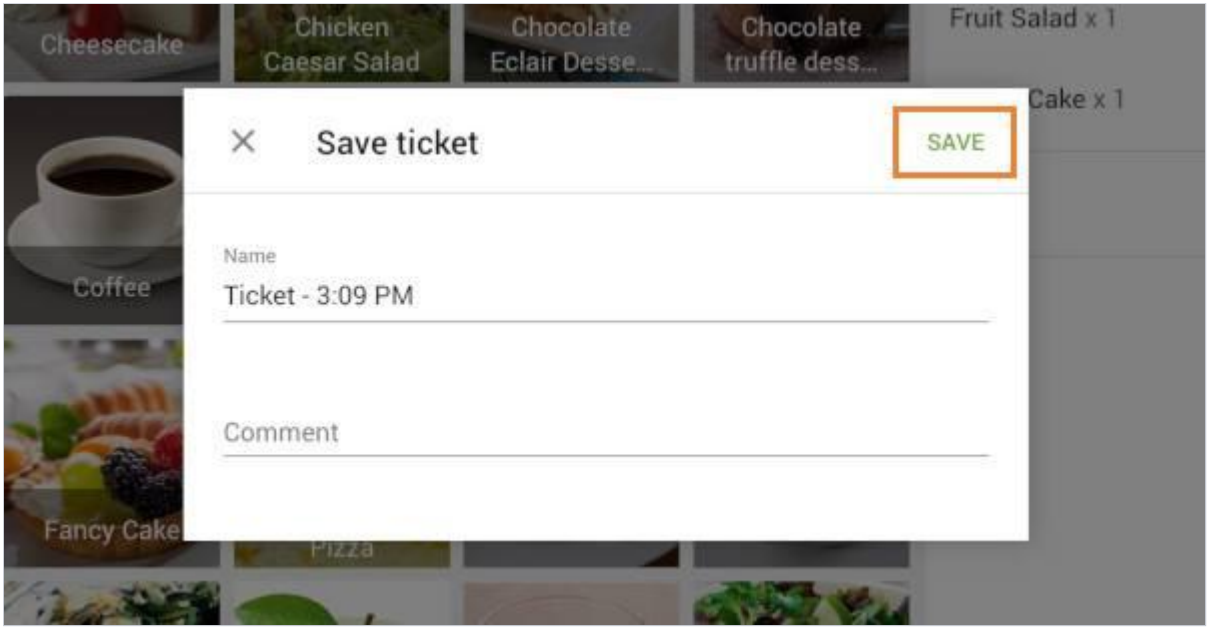
Once you've added items to the ticket, tap the **three dots (⋮)** in the upper right corner.

Select '**Print bill**' from the dropdown menu.



You will see a dialog box where you can:

- Edit the **ticket name**
- Add a **comment** (optional)



Tap '**Save**' — the bill will be printed immediately.

Coffee Shop #2
5045 Silver Lake Rd NE, St Anthony, MN 55561, United States

Receipt currency: US Dollars

BILL

Order: Ticket - 15:29
Employee: Andy
POS: POS 1

Dine in

Terrace outside

Classic Cobb Salad 1 x $6.50	$6.50
Fruit Salad 1 x $8.00	$8.00
Grated apple pie 1 x $6.00	$6.00
Amount due	**$20.50**

We Love Coffee!!

29/12/2023 15:29

If You Use Predefined Tickets

If the **Predefined Tickets** feature is active:

- You'll need to choose a name from the predefined list before the ticket is saved.

- After selecting the name, the bill will print automatically.

Bill vs. Receipt: What's the Difference?

Feature	Bill	Receipt
Title	Displays " BILL " at the top	No "BILL" title
Number	No bill number	A receipt has a unique number
Summary	Shows " Amount due "	Shows " Total "
Payment Type	Not included	Shows payment method (e.g., Cash, Card)

Notes

- A **bill is not a final document** and does not count toward sales or reports.
- After the customer confirms the order, you must finalize the sale and issue a **receipt**.
- Bills are useful in dining and hospitality settings where orders are taken and paid at different times.

With this feature, Loyverse POS makes it easy to manage pre-payment customer interactions professionally and efficiently.

See also: What is the difference between bills and receipts?

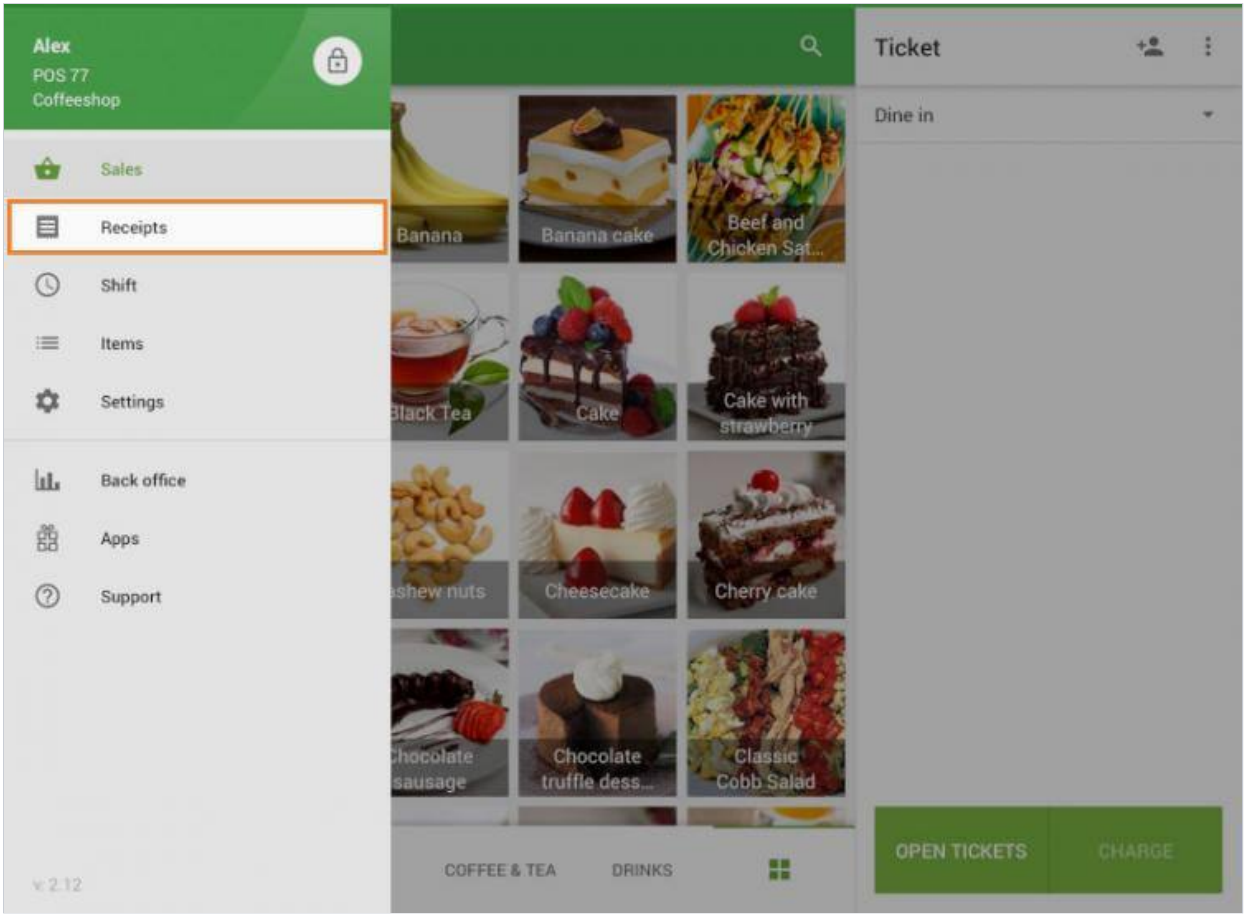
Receipts List in the POS

Video
https://www.youtube.com/watch?v=CPoZVGSBc-M

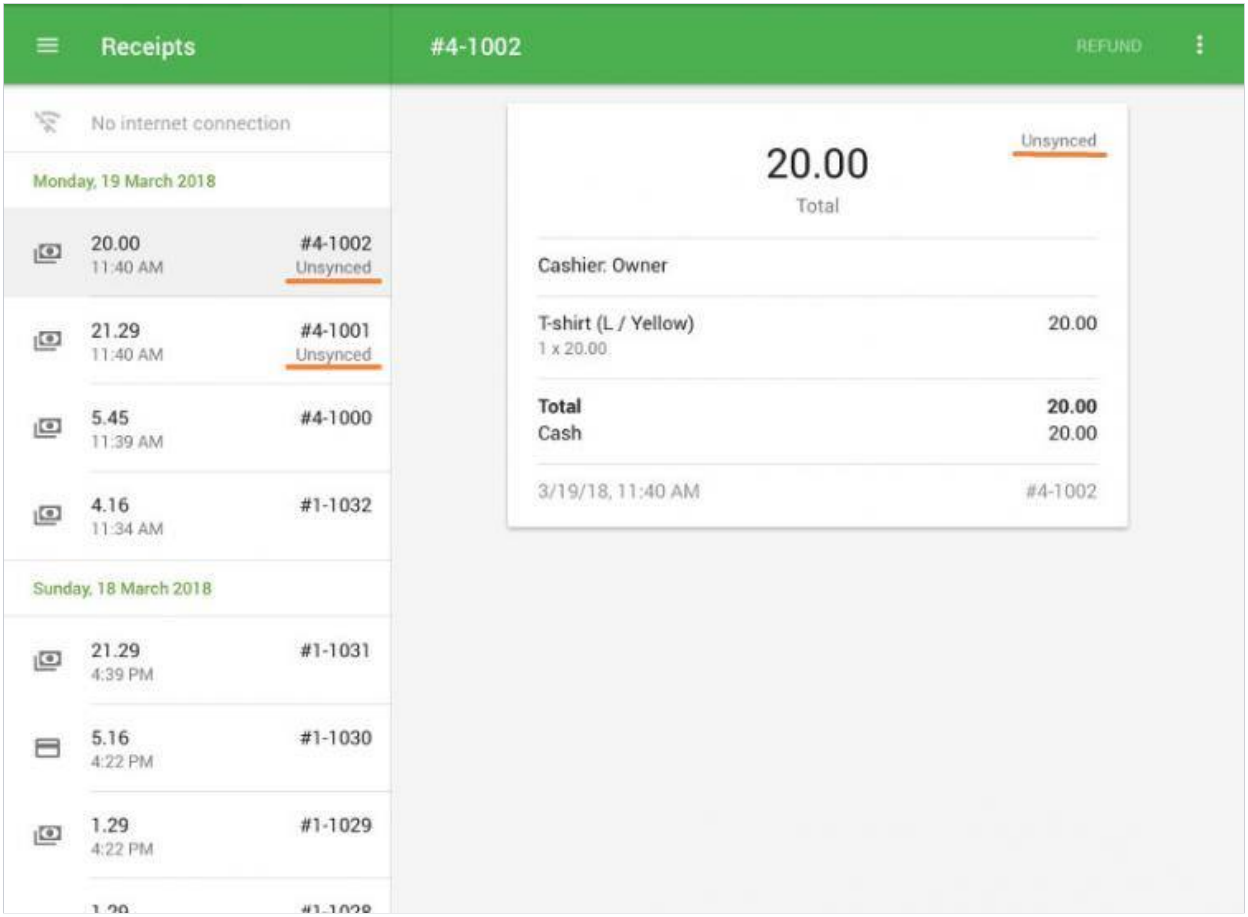
Loyverse POS lets you conveniently access and manage sales receipts directly from your mobile device.

Accessing the Receipts List

To view past transactions, tap the **'Receipts'** button from the POS menu.



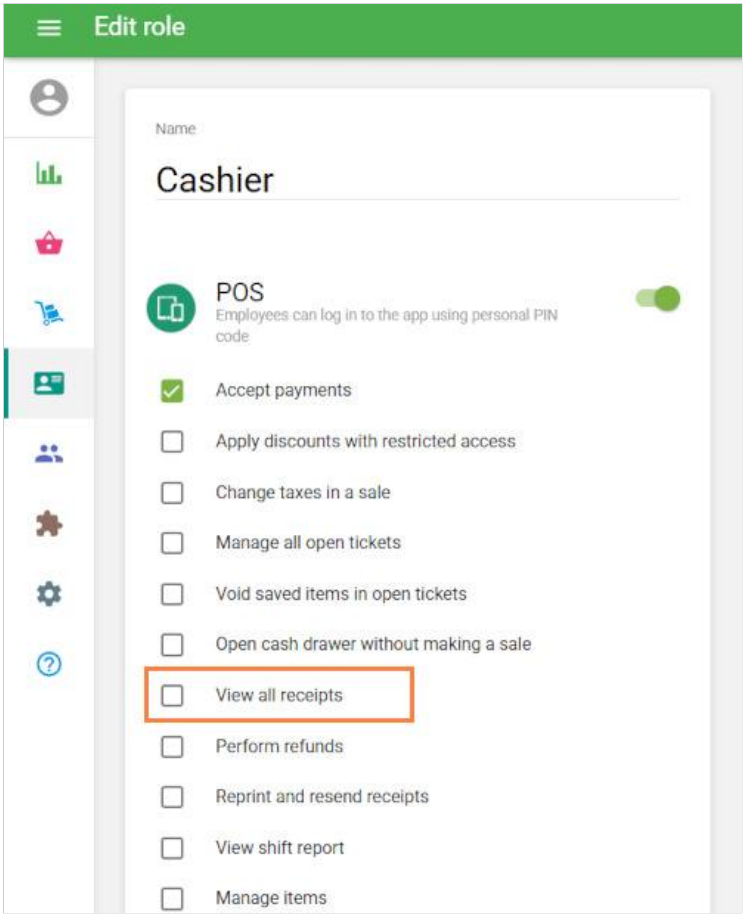
- The list displays **receipts from all POS devices** associated with the **same stor**e.
- To refresh the list, simply **swipe down** on the screen.
- Receipts created while the device was **offline** will be marked as '**Unsynced**'.



Once an Internet connection is restored, unsynced receipts will automatically sync with the Back Office.

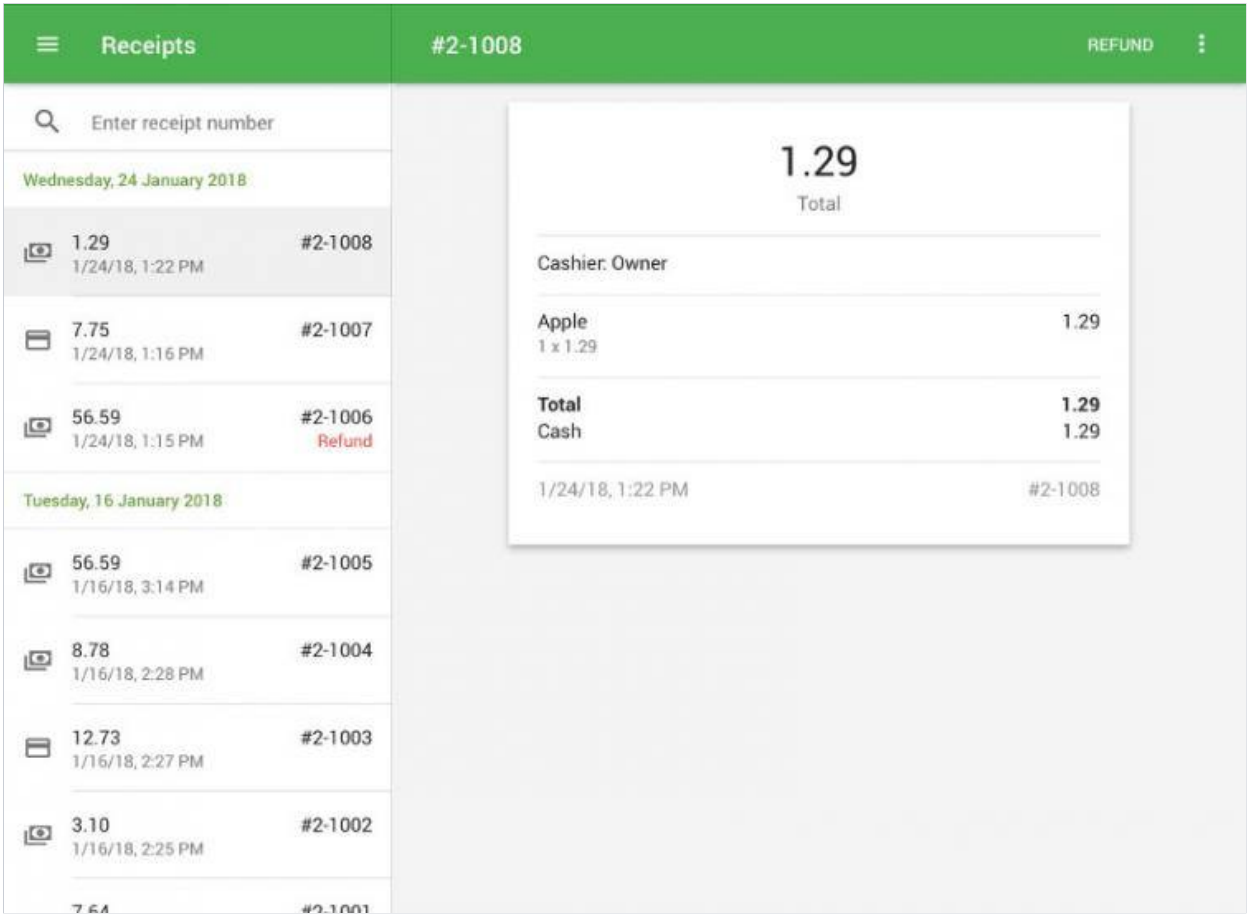
Access Rights and Visibility

If an employee's access rights have disabled the option '**View all receipts**' (set in the Back Office), they will only be able to see the **last 5 receipts** on the list.



Viewing Receipt Details

Tap on any receipt to view its full details, including:



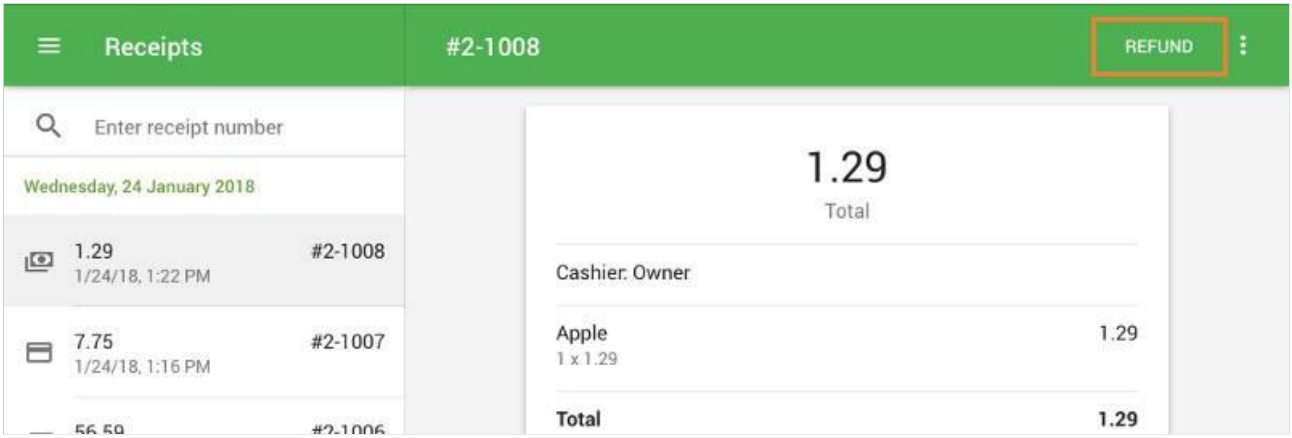
- Date and time of sale
- Sold items and quantities
- Total amount
- Payment method used

Available Actions

Inside the receipt details screen, you'll find multiple action options:

Refund

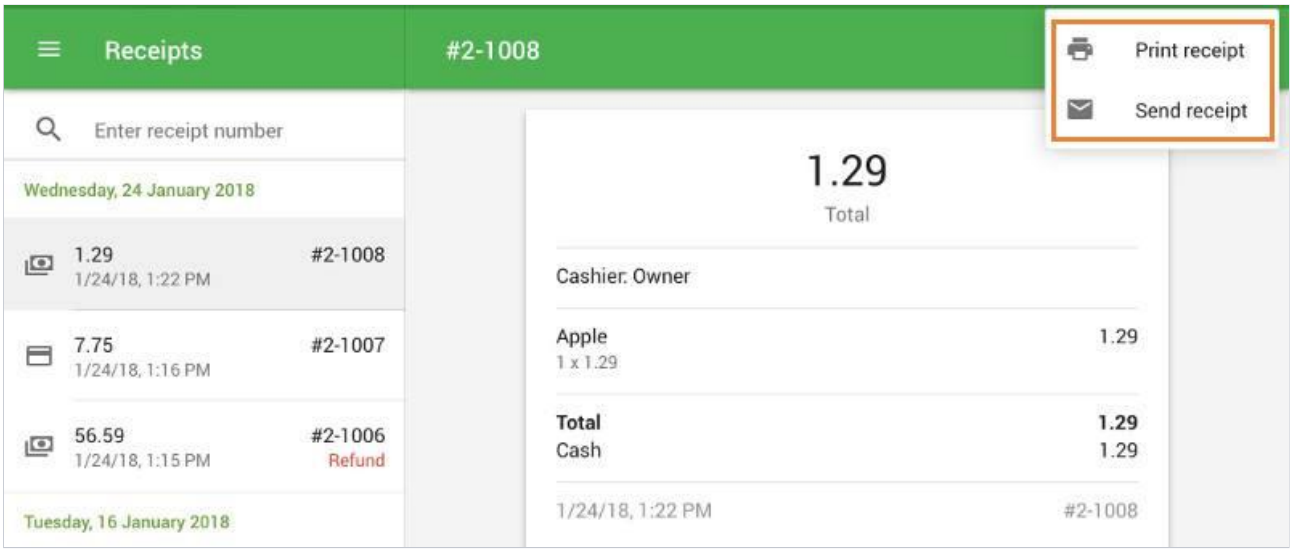
Tap the **'Refund'** button to issue a full or partial refund.



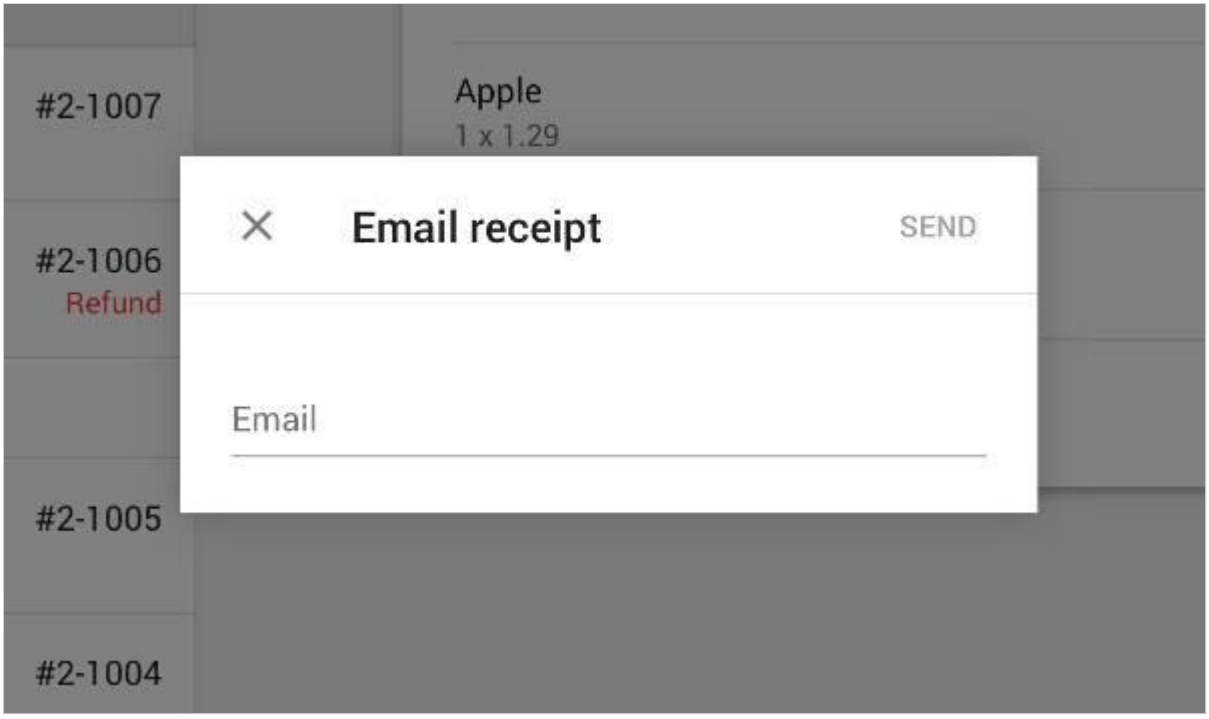
Note: Refunds require an active **Internet connection**. If offline, the '**Refund**' button will be disabled.

⋮ Three-dot Menu Options

Tap **the three dots (⋮)** in the upper-right corner to open additional options:



- **Print Receipt** – if a printer is connected to your POS device.
- **Send Receipt** by Email – enter the customer's email and tap '**Send**'.



If your device is offline, the email will be queued and sent automatically once the Internet connection is restored.

Offline Limitations

- **Refunds** cannot be processed without an Internet connection.
- The **search field** is not available when operating in **offline mode**.
- **Email receipts** will be delayed until connectivity is restored.

This receipt list functionality helps you quickly resolve customer inquiries, process refunds, and reprint or email receipts—all from your POS.

See also:

How to Arrange Sale Screen in Loyverse POS

How to Issue a Refund on Loyverse POS

Offline Use of Loyverse POS

How to Send an E-mail Receipt to Customers in Loyverse POS

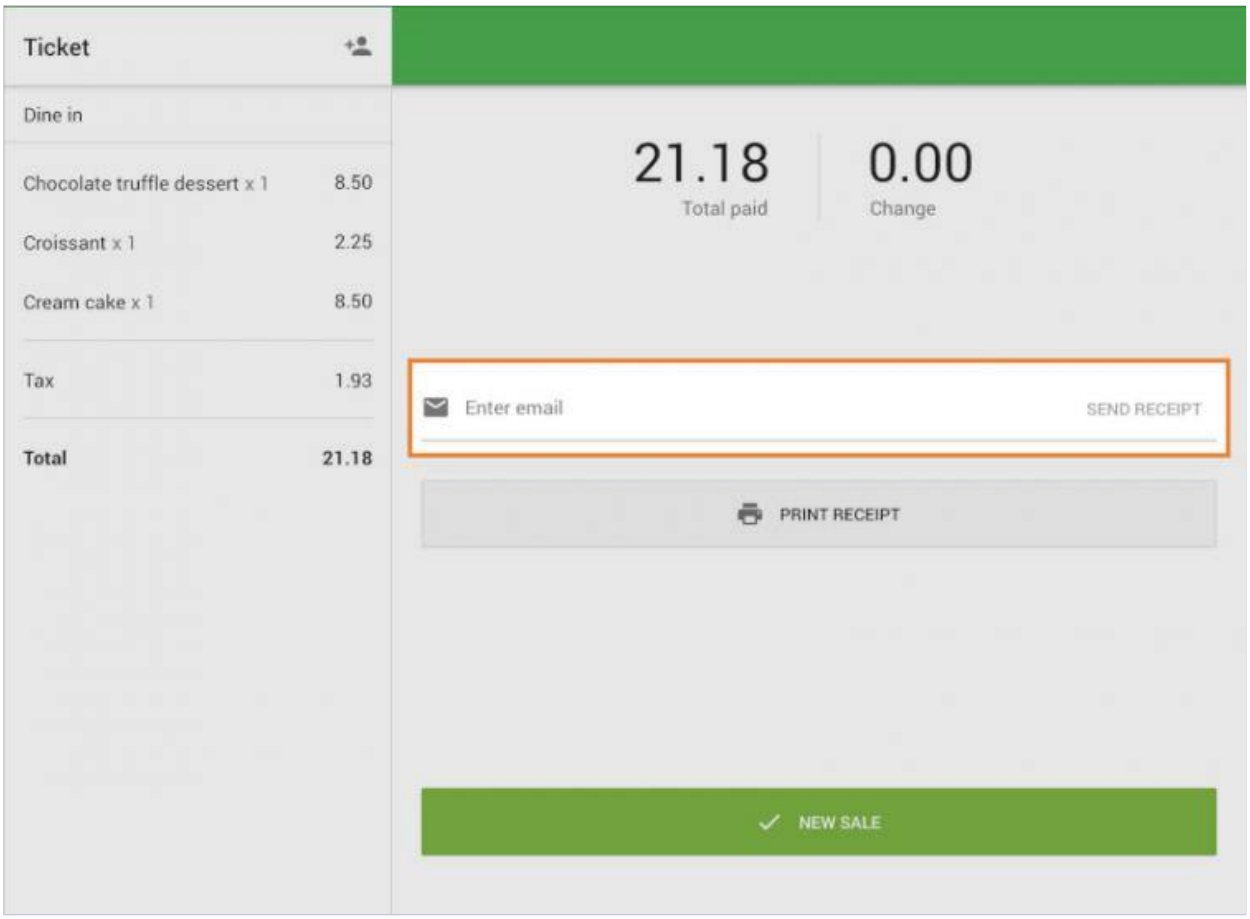
Loyverse POS makes it easy to send a digital receipt to your customer via email right after completing a sale. This is a great way to offer a paperless option and keep customers happy.

Steps to Send a Receipt via Email

After you complete the **payment** for a sale, a confirmation screen will appear.

In the **‘Enter email’** field, type the customer’s email address.

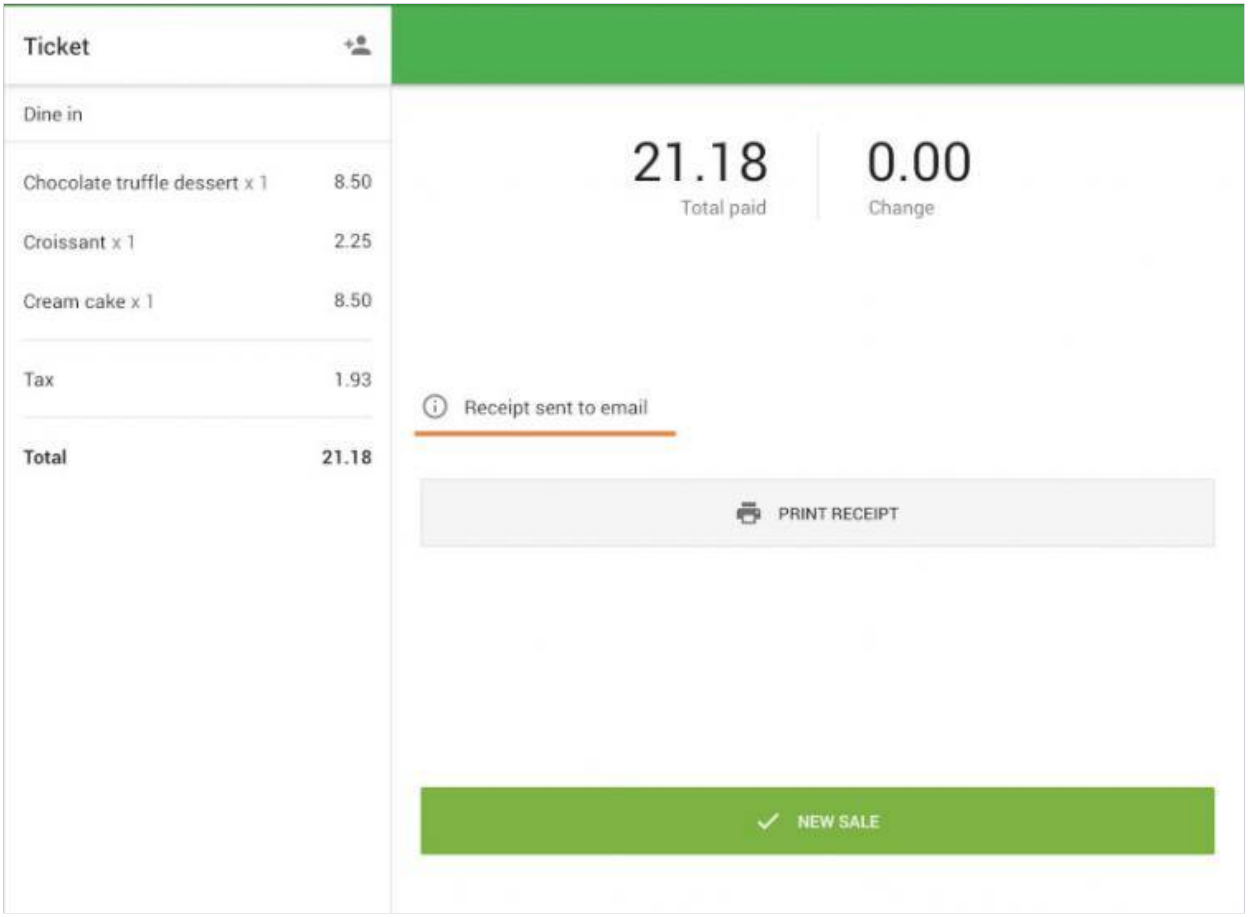
Tap the ‘**Send receipt**’ button.



Important Tips

Double-check the email address before sending — if the address is incorrect, the receipt will not be delivered.

After the message ‘**Receipt sent to email’ appears**, tap the **New Sale** button to send an email receipt, finalize this sale, and go to the Sale screen to proceed with the next sale.



Note

- The email address entered here is **not saved** to your customer database.
- If you want to save customer contact information for future use, add the customer before completing the sale.
- If the device is offline, Email receipts are queued and sent to customers only after the connection to the Internet is reestablished.

Sending receipts by email is a convenient and eco-friendly way to enhance your customer experience with Loyverse POS.

See also:

How to Make Sales

How to Sign Up a Customer in Loyverse POS

Shifts

Shift Management in Loyverse POS

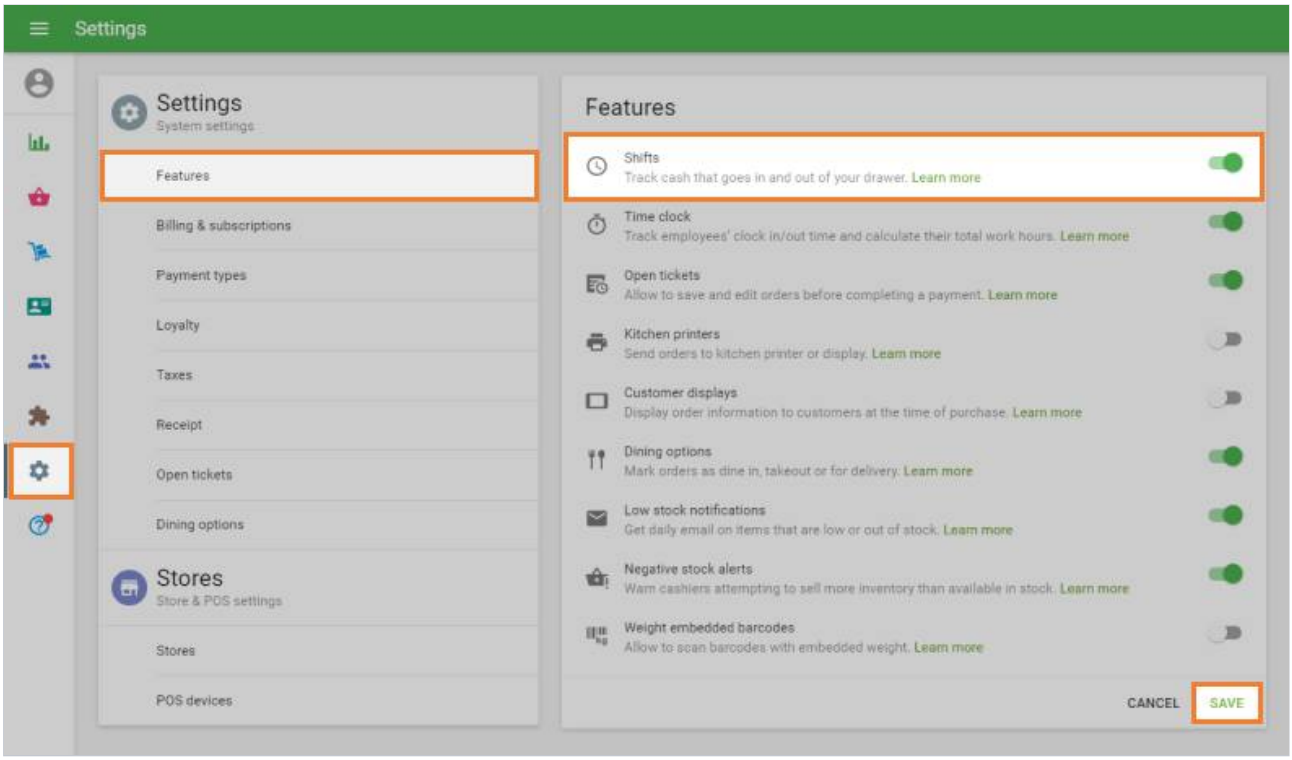
Video
https://www.youtube.com/watch?v=fXiwgHI8VJQ

The **Shifts** feature helps businesses track cash activity during a working period. It records opening cash amounts, pay ins, pay outs, cash sales, refunds, and closing balances. Shift reports are stored in the Back Office for review and control.

1. Enabling Shifts

Log in to your **Back Office**.

Go to **Settings → Features**.



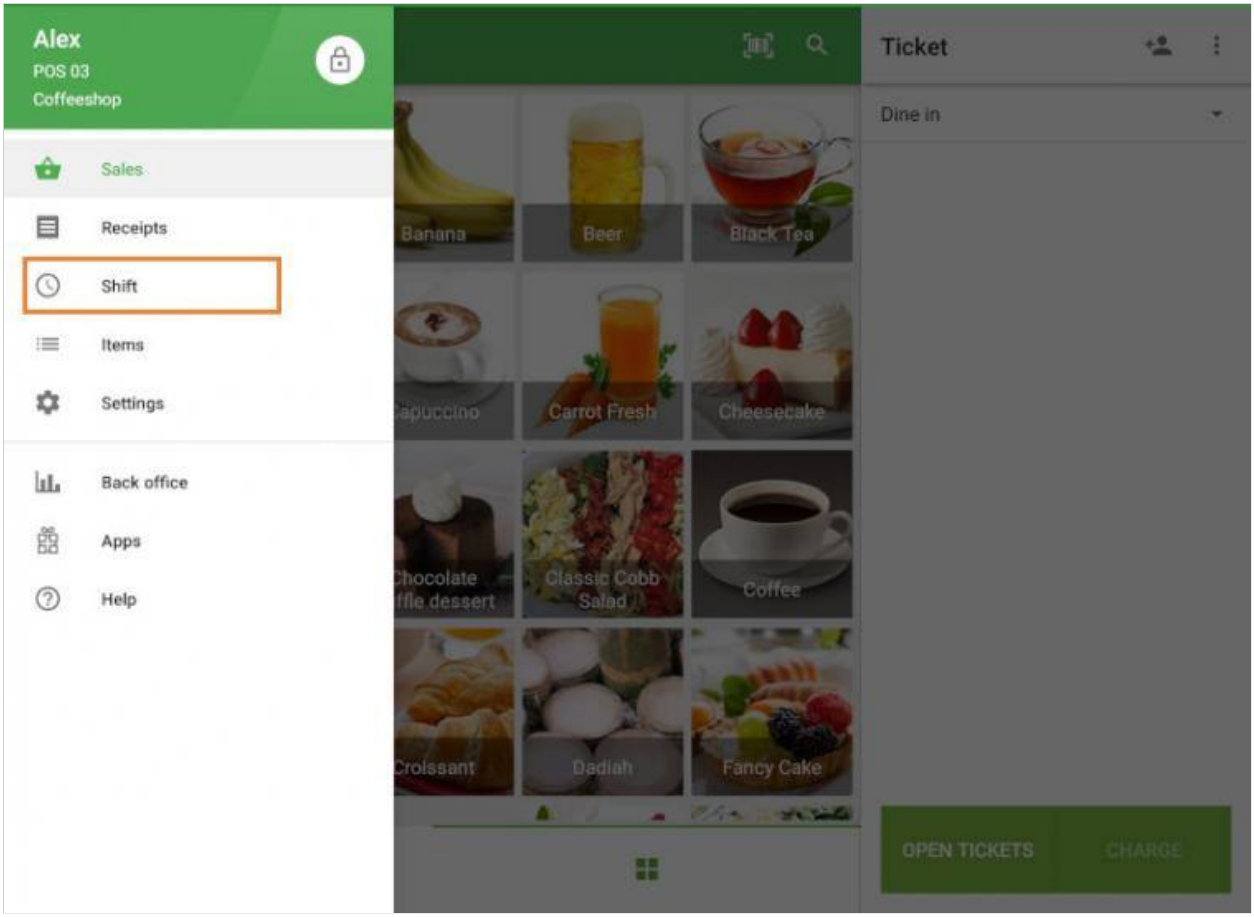
Enable the **Shifts** option.

Click **Save**.

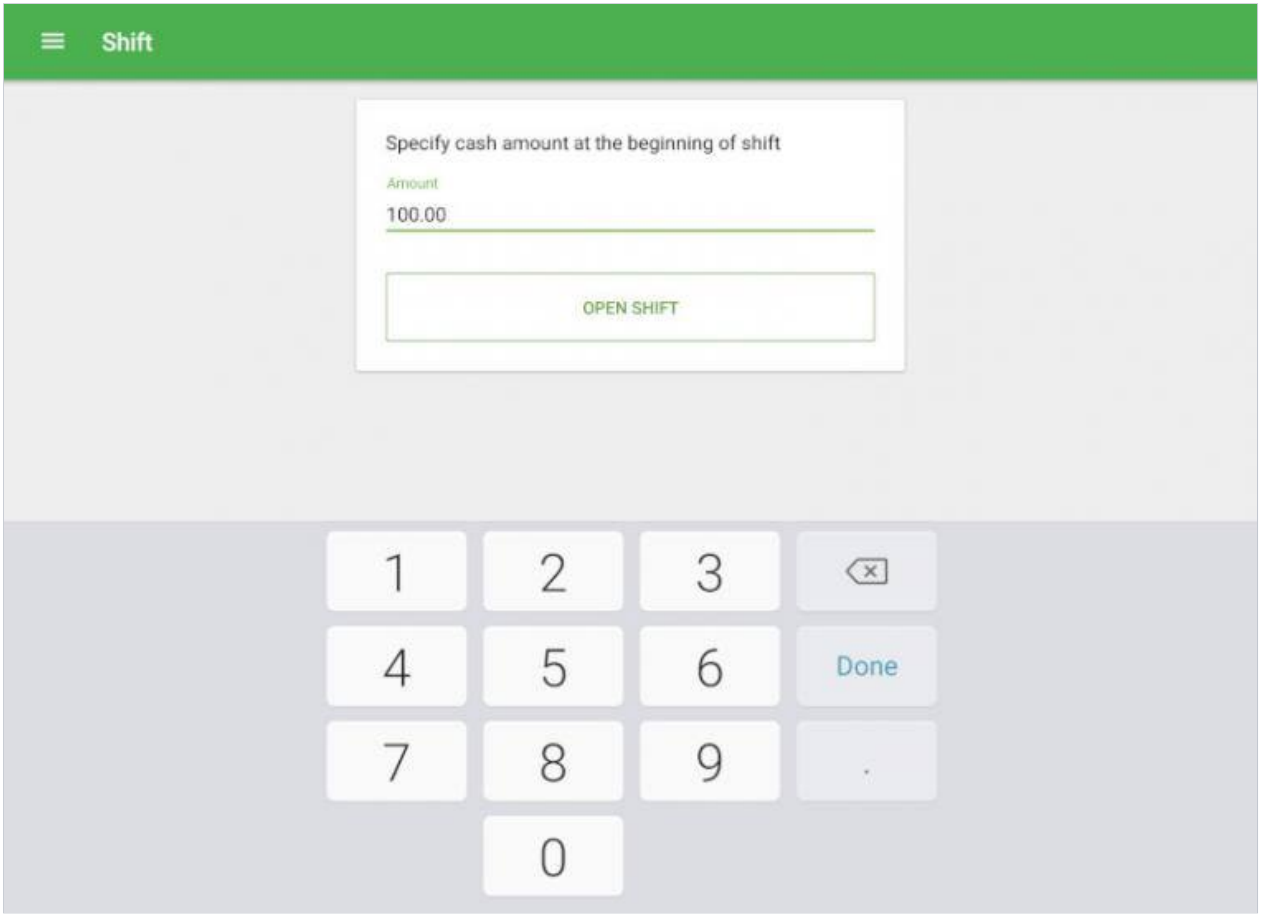
Once enabled, the **Shift** menu will appear in the **Loyverse POS** app.

2. Opening a Shift

In the Loyverse POS app, open the **Shift** menu.



Enter the **opening cash amount**—the amount of cash in the drawer at the start of the working period.



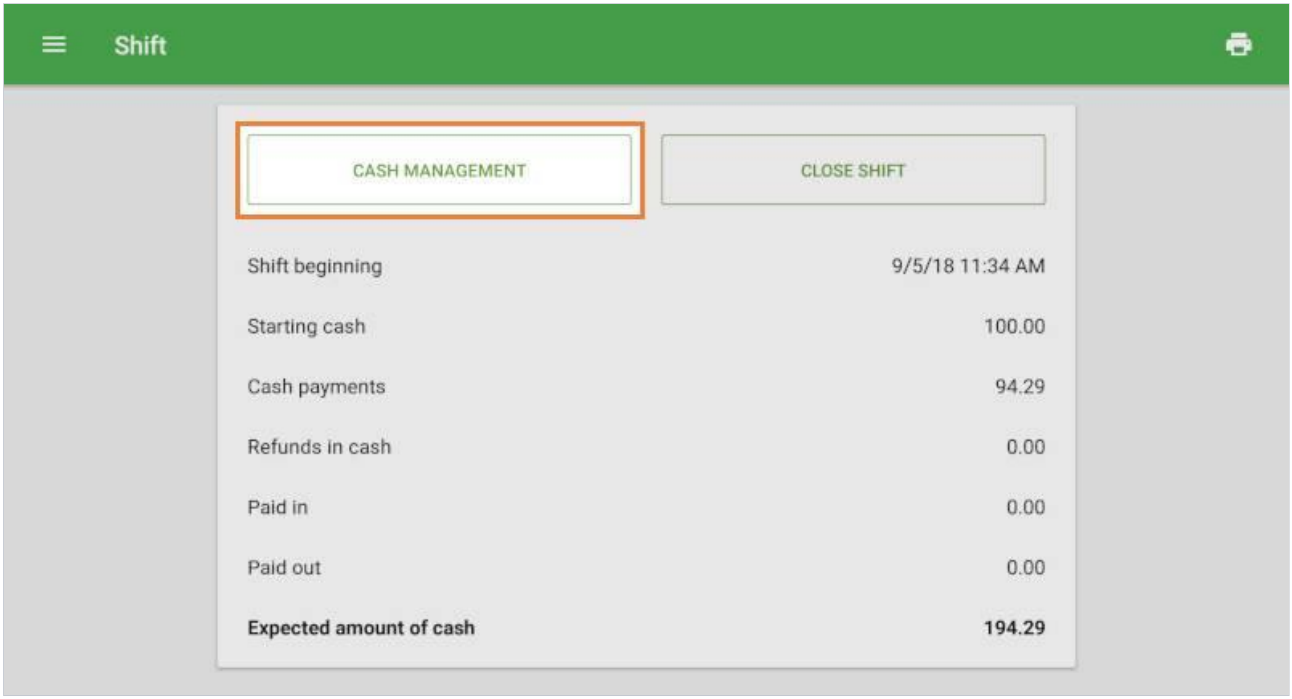
Tap **Open shift**.

The shift is now active, and all cash and sales operations will be recorded.

3. Cash Management During a Shift

To record non-sales cash movements:

Go to **Shift → Cash management**.



You can perform two types of operations:

Pay In

Use **Pay In** when adding cash to the drawer without a sale—for example, supplying change.

- Enter the amount.
- Tap **Pay In**.

Pay Out

Use **Pay Out** when removing cash from the drawer outside of a refund or sale—for example, paying for small expenses.

- Enter the amount.
- Tap **Pay Out**.



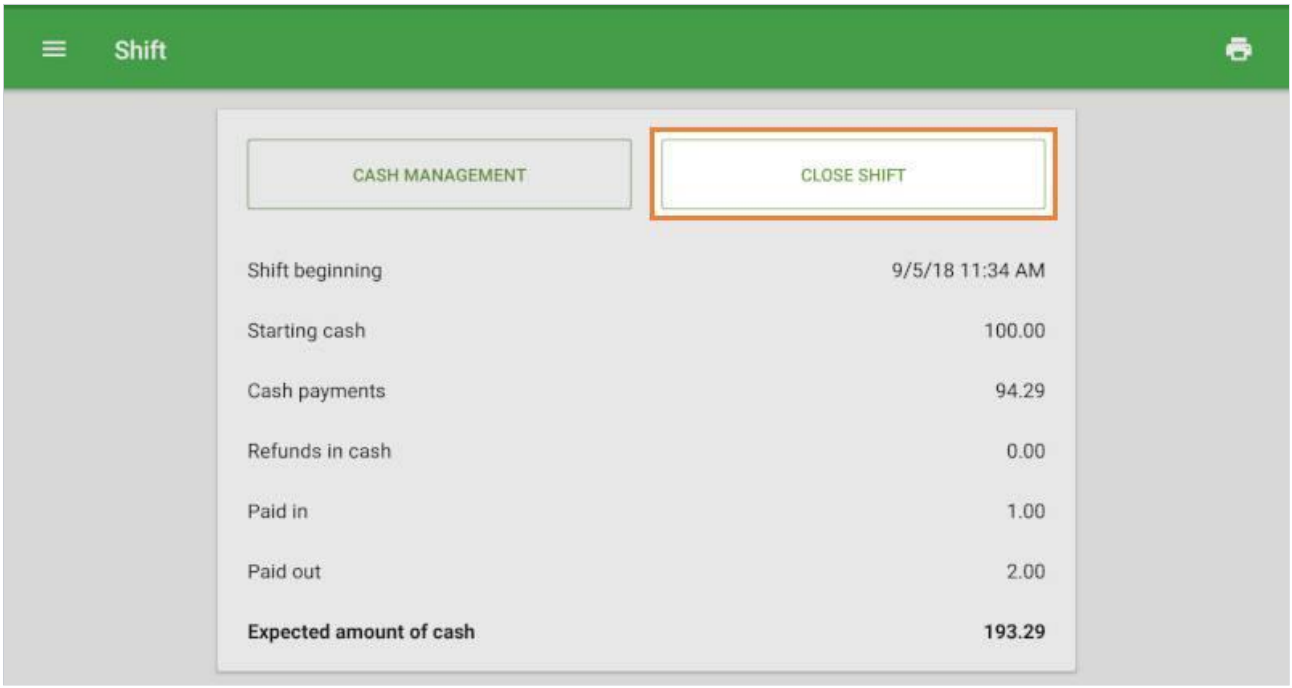
All operations are recorded in the cash management history and will be reflected in the shift report.

4. Closing a Shift

At the end of the working period:

Open the **Shift** menu.

Tap **Close shift**.



You will see the **Shift summary** screen:

- **Expected cash amount** – calculated from cash sales, refunds, and pay in/pay out operations.

- **Actual cash amount** – the amount counted physically in the cash drawer.
- The system will display any difference between these amounts.



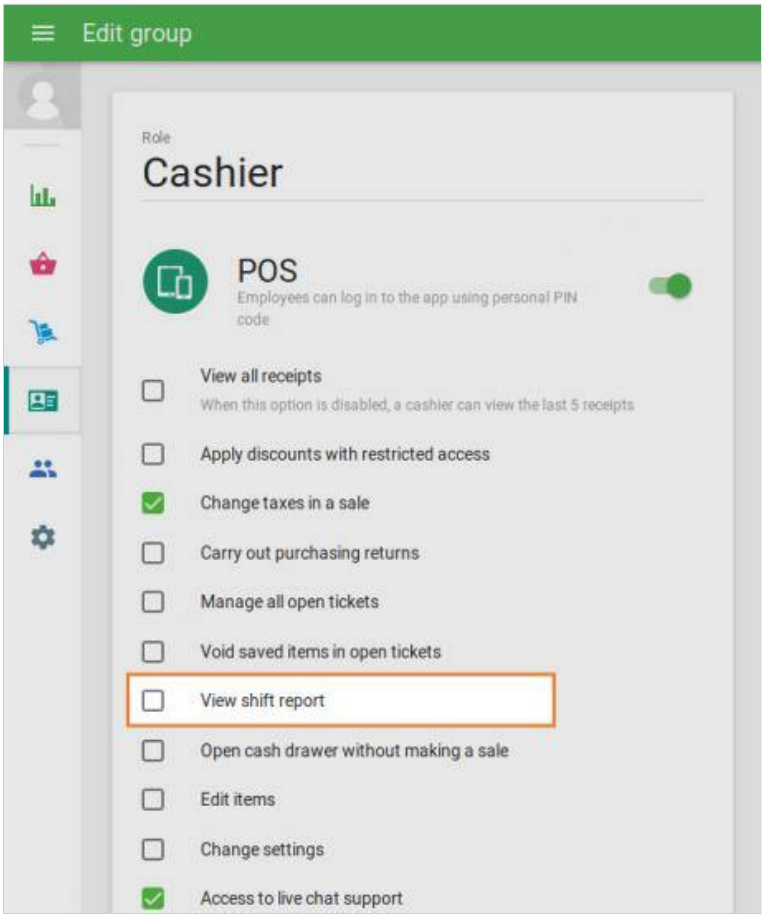
When ready, tap **Close shift** to complete the shift.

5. Restricting Access to Expected Cash Amount

If you want cashiers to enter only the **Actual cash amount** without seeing the expected value:

In the Back Office, go to **Employees → Access rights**.

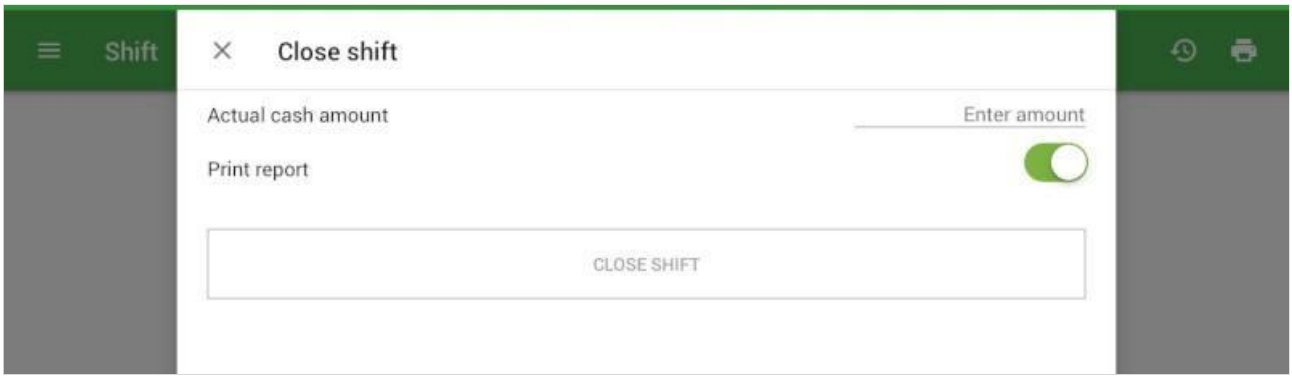
Open the **Cashier** role (or another role you want to adjust).



Disable **View shift report**.

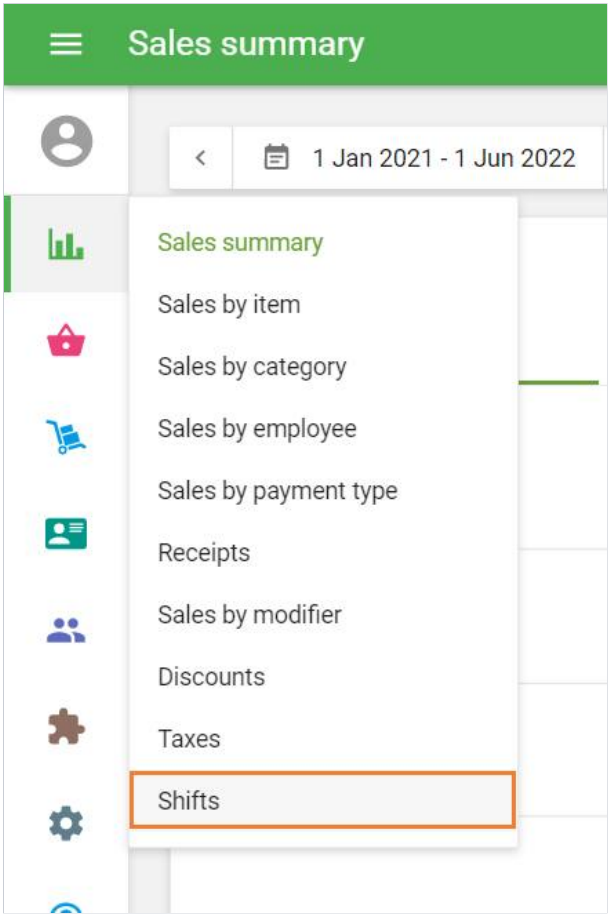
Save the changes.

After this, cashiers will only see the **Actual cash amount** field when closing the shift.



6. Shift Reports in Back Office

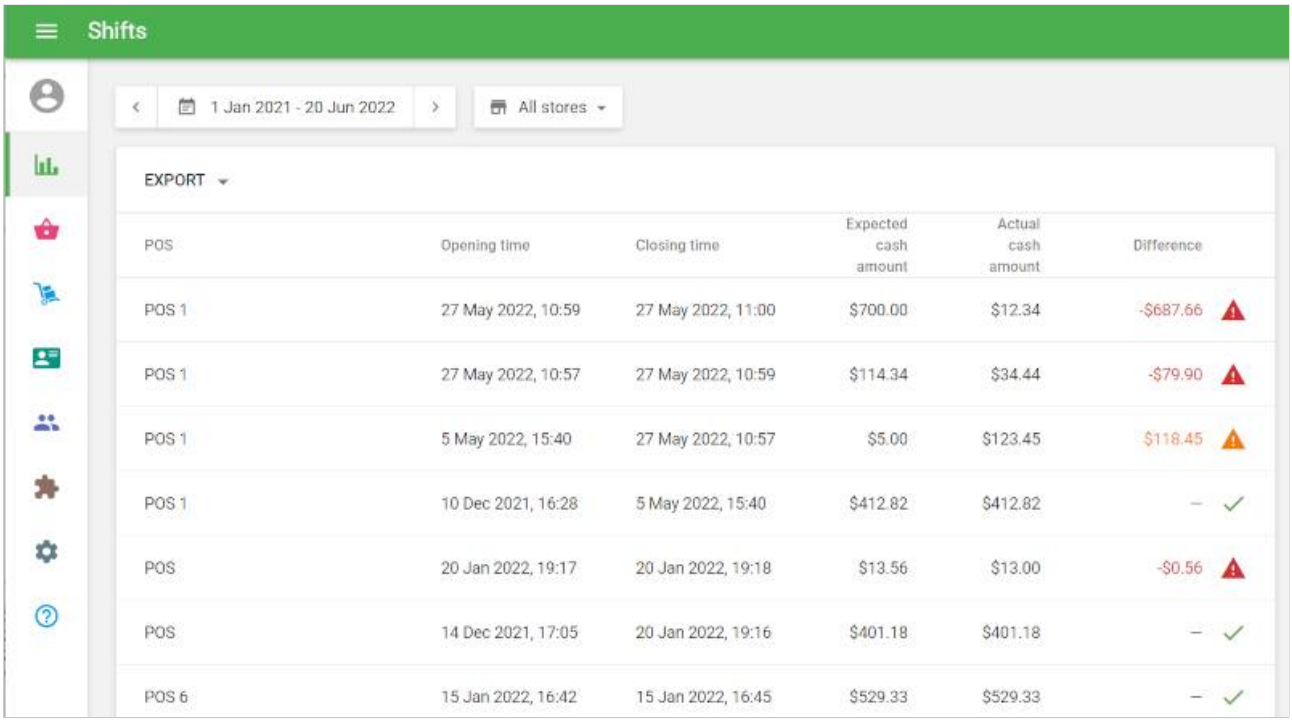
Shift reports are available in the **Back Office → Reports → Shifts** section.



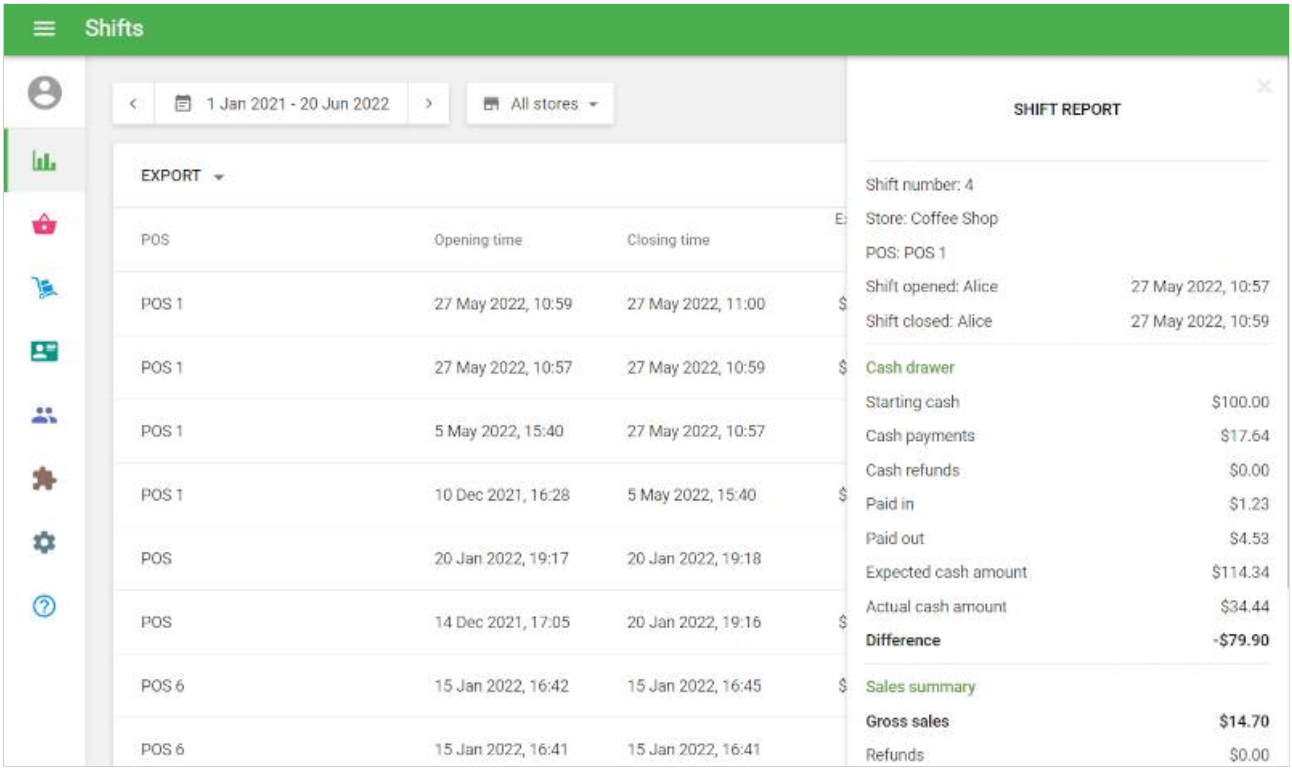
The shift list shows:

- POS name
- Opening and closing time

- Expected cash amount
- Actual cash amount
- Cash difference



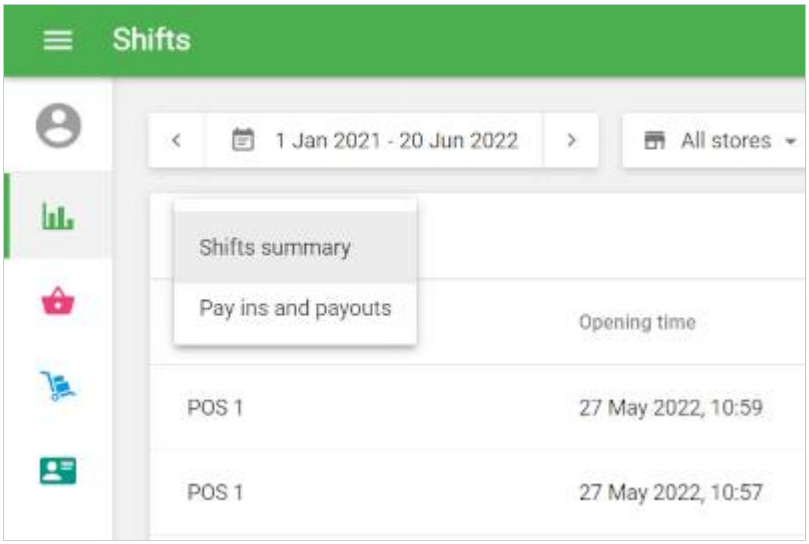
Click on a shift to view detailed information, including all pay ins, pay outs, and cash-related transactions.



You can export:

- **Shift summary report**
- **Pay ins and payouts report**

for accounting or audit purposes.



See also:

Shift Report with Sales Summary at the POS

How to Work with Shift History in the POS

Open Tickets

How to Work with Open Tickets

Video
https://www.youtube.com/watch?v=D3OIWTjol3w

The **Open Tickets** feature allows you to create, edit, and save orders before completing a sale. This is especially useful for **cafes**, **bars**, **and** **restaurants**, where orders are placed and paid for at different times.

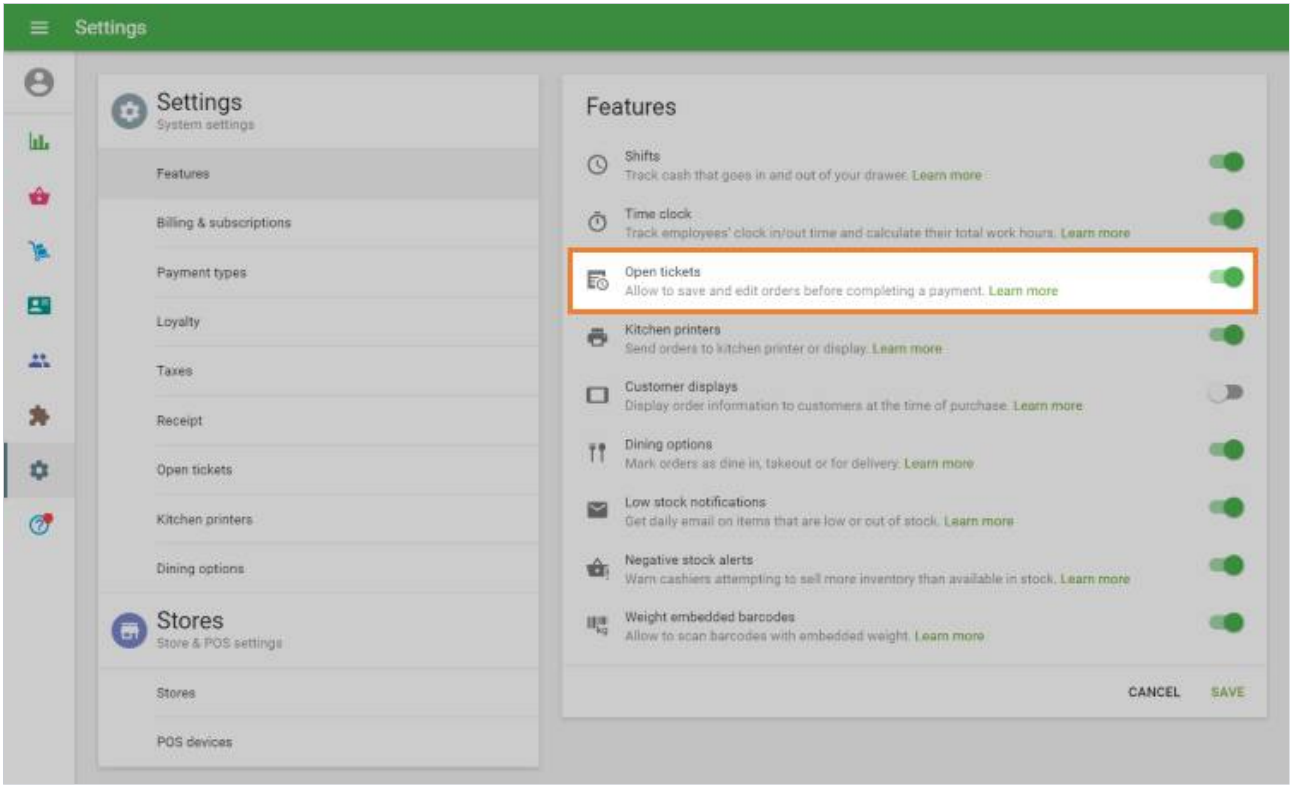
With **Open Tickets**, you can manage several orders simultaneously — editing, updating, and finalizing each one when the customer is ready to pay.

1. Enabling Open Tickets

To activate the feature:

In the **Back Office**, go to the **Settings menu**.

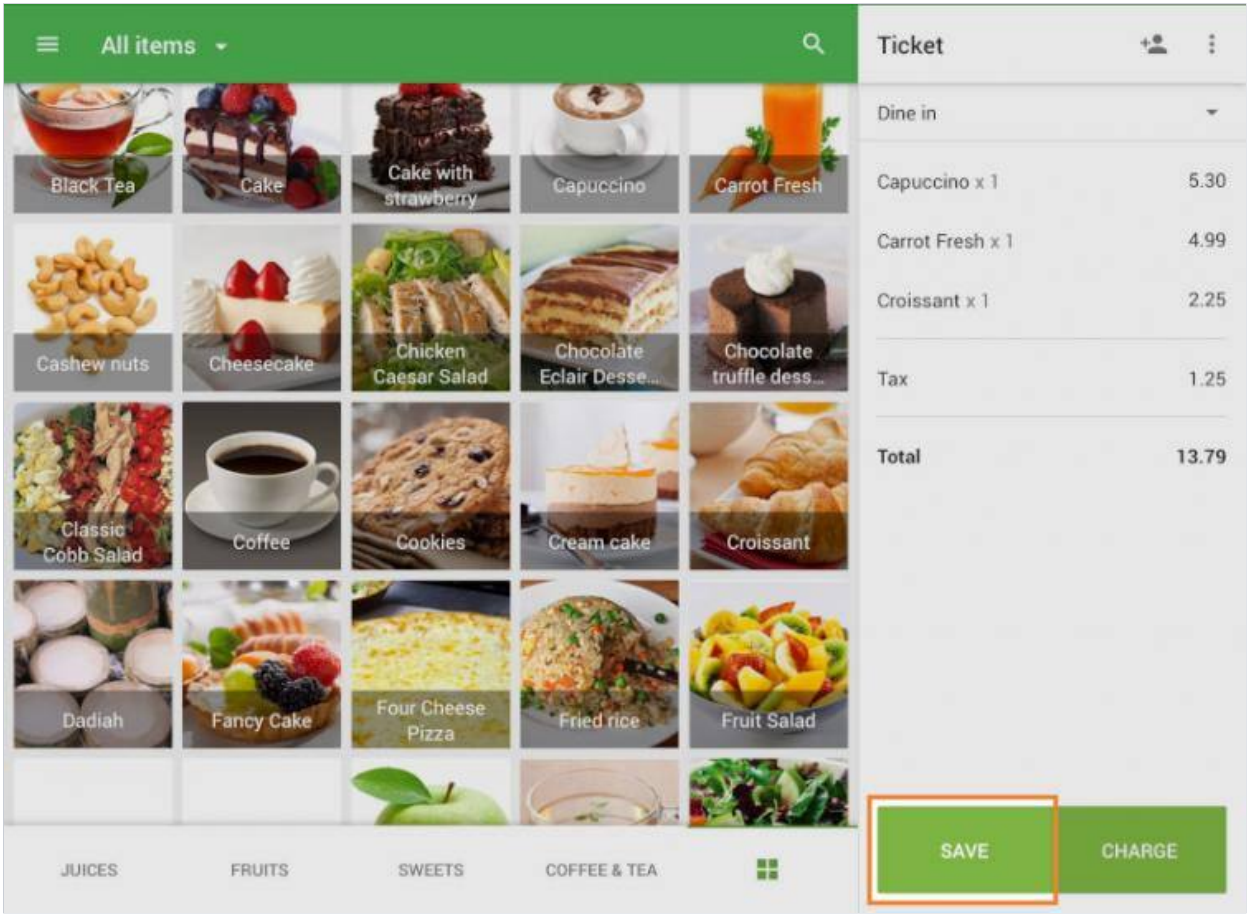
Under the **Features** section, find and enable **Open tickets**.



Click **Save** to apply your changes.

2. Creating an Open Ticket

In the **Loyverse POS app**, add items to the sale as usual.



Tap the **Save** button instead of completing the payment.

In the pop-up window:

- You can **rename** the ticket (by default, it's named using the current time).
- Optionally, add a **comment** (for example, a customer name, table number, or note).
- Tap **Save** to confirm.

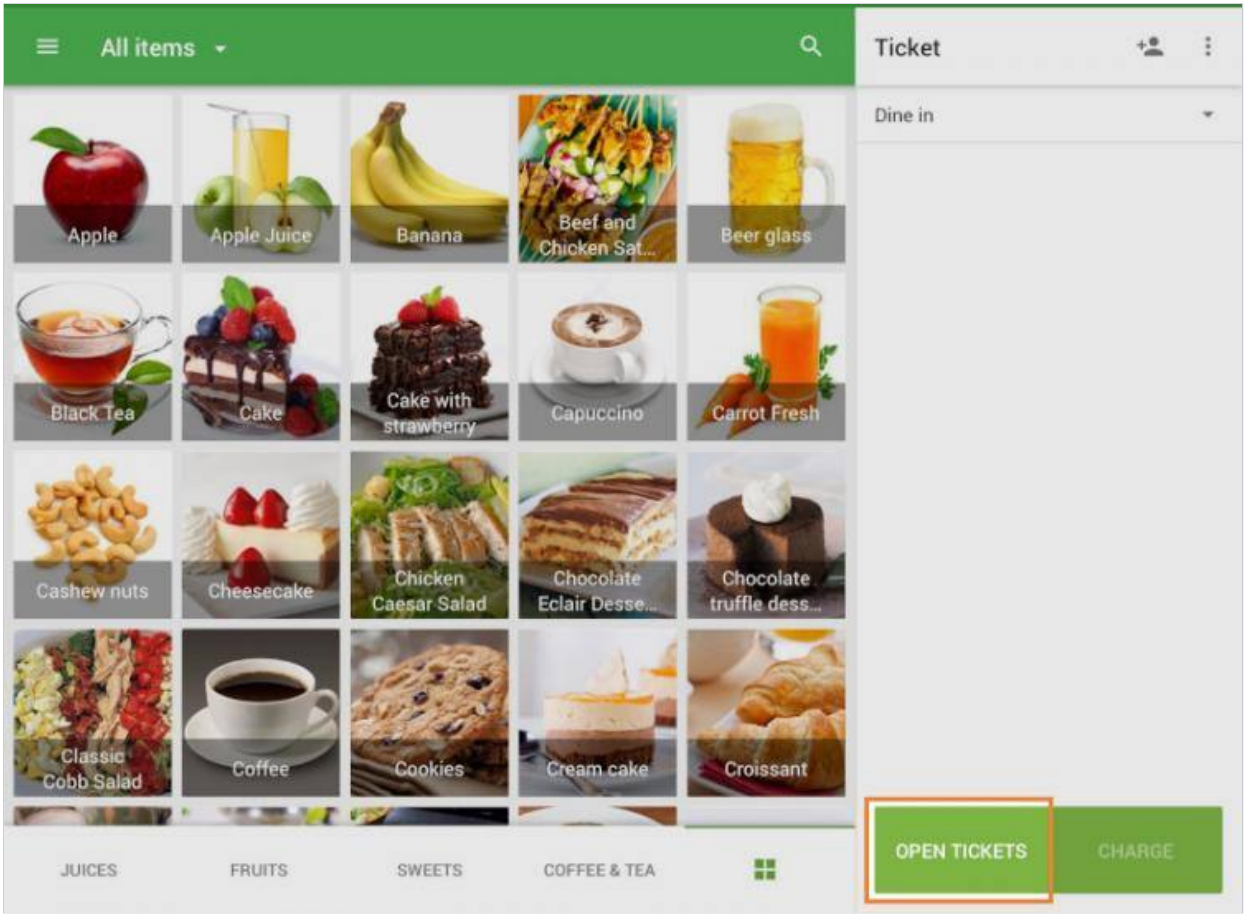
If predefined tickets are enabled, you'll need to select one from the predefined ticket list instead of entering a custom name.

After saving, the sale screen will be cleared so you can start a new order.

3. Searching and Editing Open Tickets

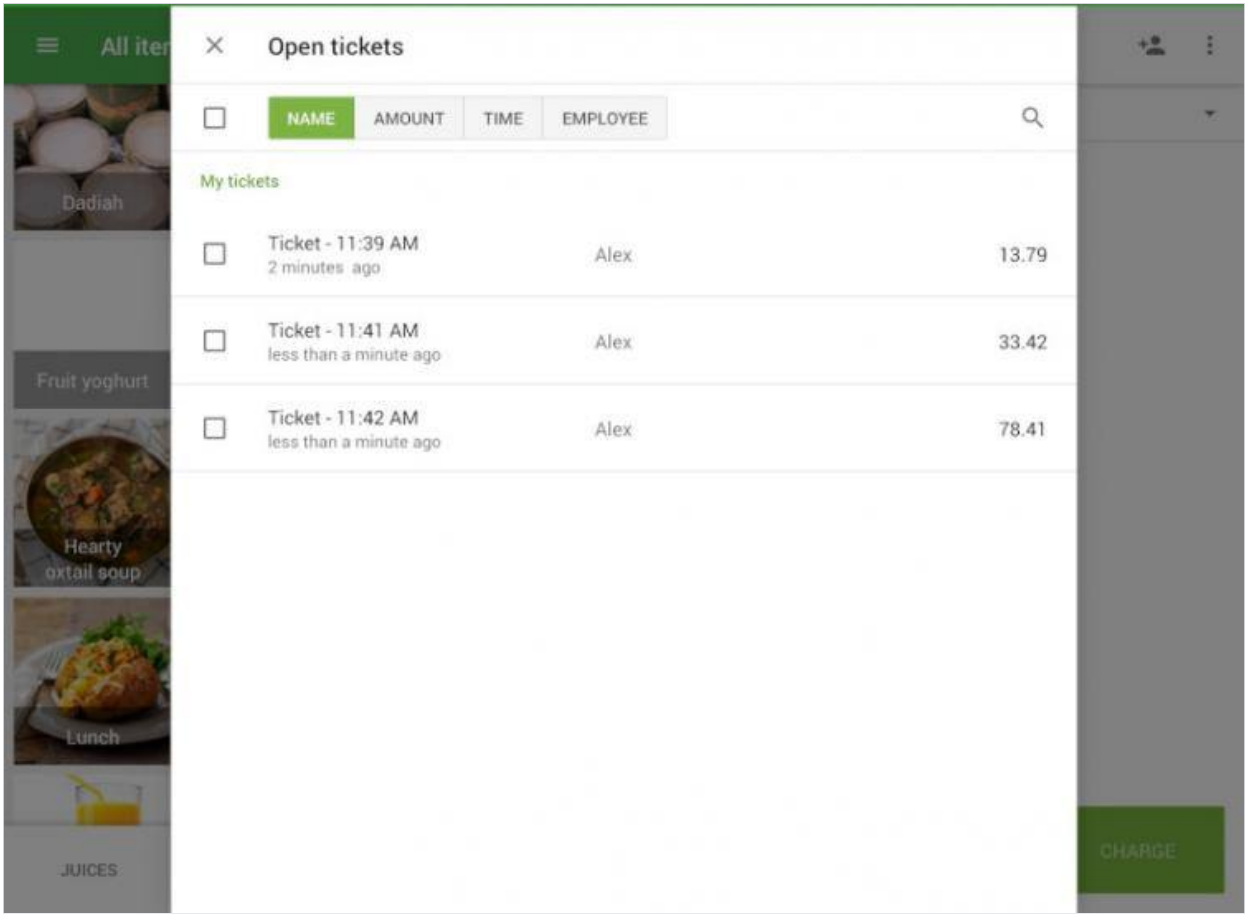
To view or edit existing open tickets:

Tap the **Open tickets** button on the sale screen.



You'll see a list of all saved tickets, which can be **sorted** by:

- Ticket name
- Total amount
- Last modification time
- Employee

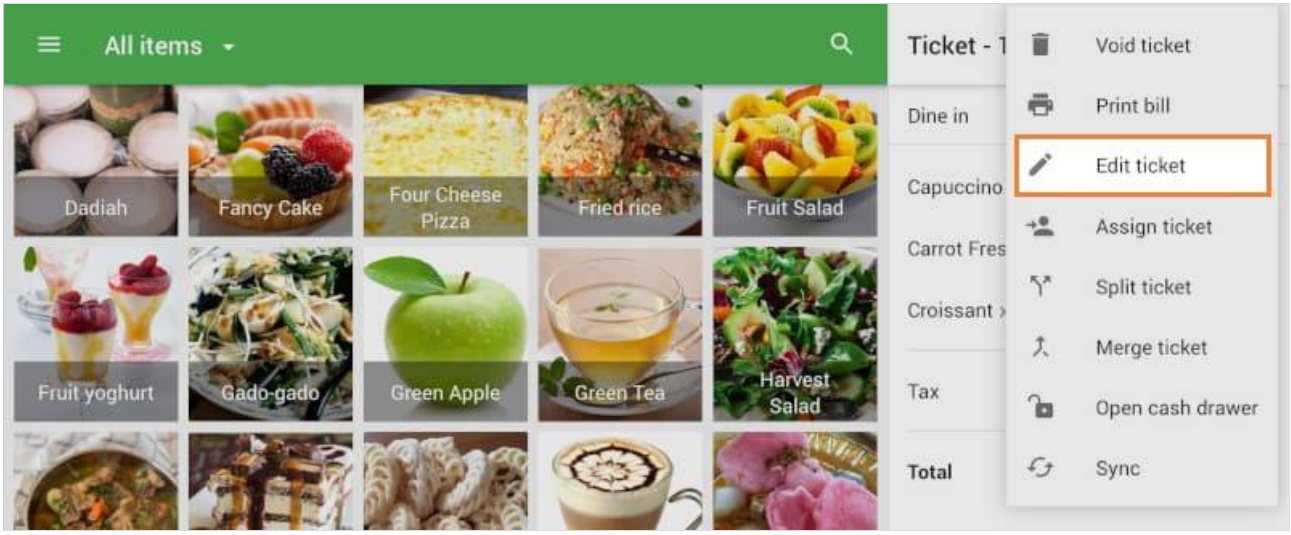


Use the **search bar** if the list is long.

To **edit or close** a ticket:

1. Tap the desired ticket.
2. Make the necessary changes or proceed to payment to close it.
3. Tap **Save** or **Charge** to confirm.

To **edit the ticket name or comment**, open the three-dot menu (⋮) and select **Edit ticket**.



4. Assigning and Removing Open Tickets

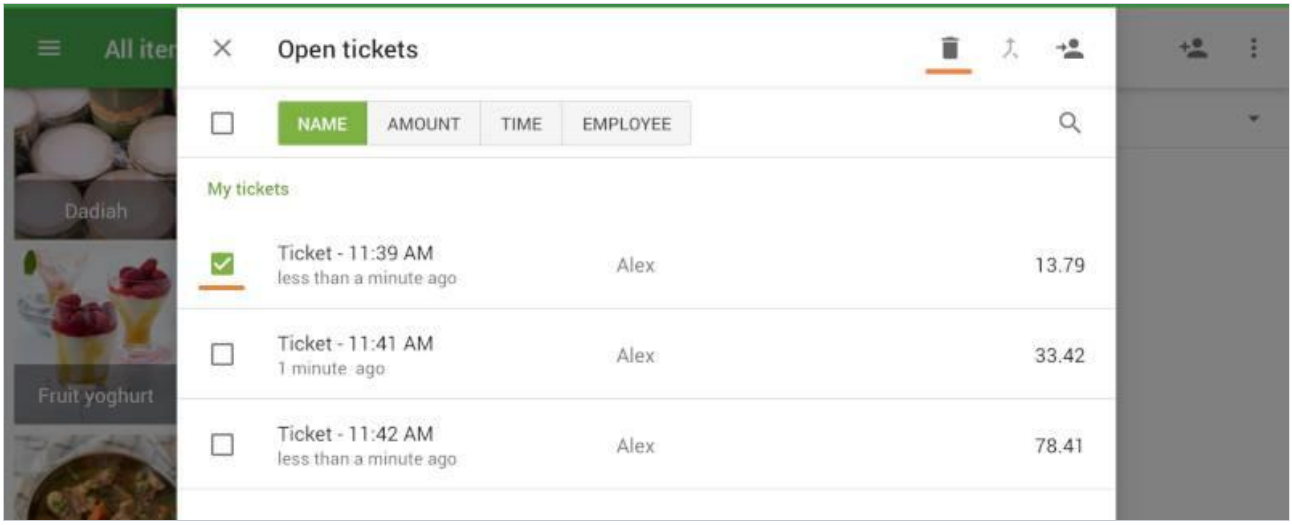
Employees with the **Manage all open tickets** permission can assign tickets to other staff members.

To assign tickets:

1. In the **Open tickets** list, check the tickets you want to reassign.
2. Tap the **assign** icon in the upper-right corner.
3. Select the employee from the search list and tap **Assign**.

To **delete** a ticket:

- Select it from the list and tap the trash can icon.



5. Restricting Access to Open Tickets

You can control which actions cashiers are allowed to perform with open tickets.

To prevent them from deleting saved open tickets or removing items from them:

1. In the **Back Office**, open the **Access rights** menu.
2. Select the **Cashier** user group.
3. Deselect the option **Void saved items in open tickets**.
4. Click **Save** to apply changes.

You can now efficiently manage multiple ongoing orders using Open Tickets — keeping service organized, reducing errors, and ensuring every customer's order is handled smoothly from start to finish.

See also:

Open Tickets Synchronization

How to Use Predefined Open Tickets

How to Split an Open Ticket with Loyverse POS

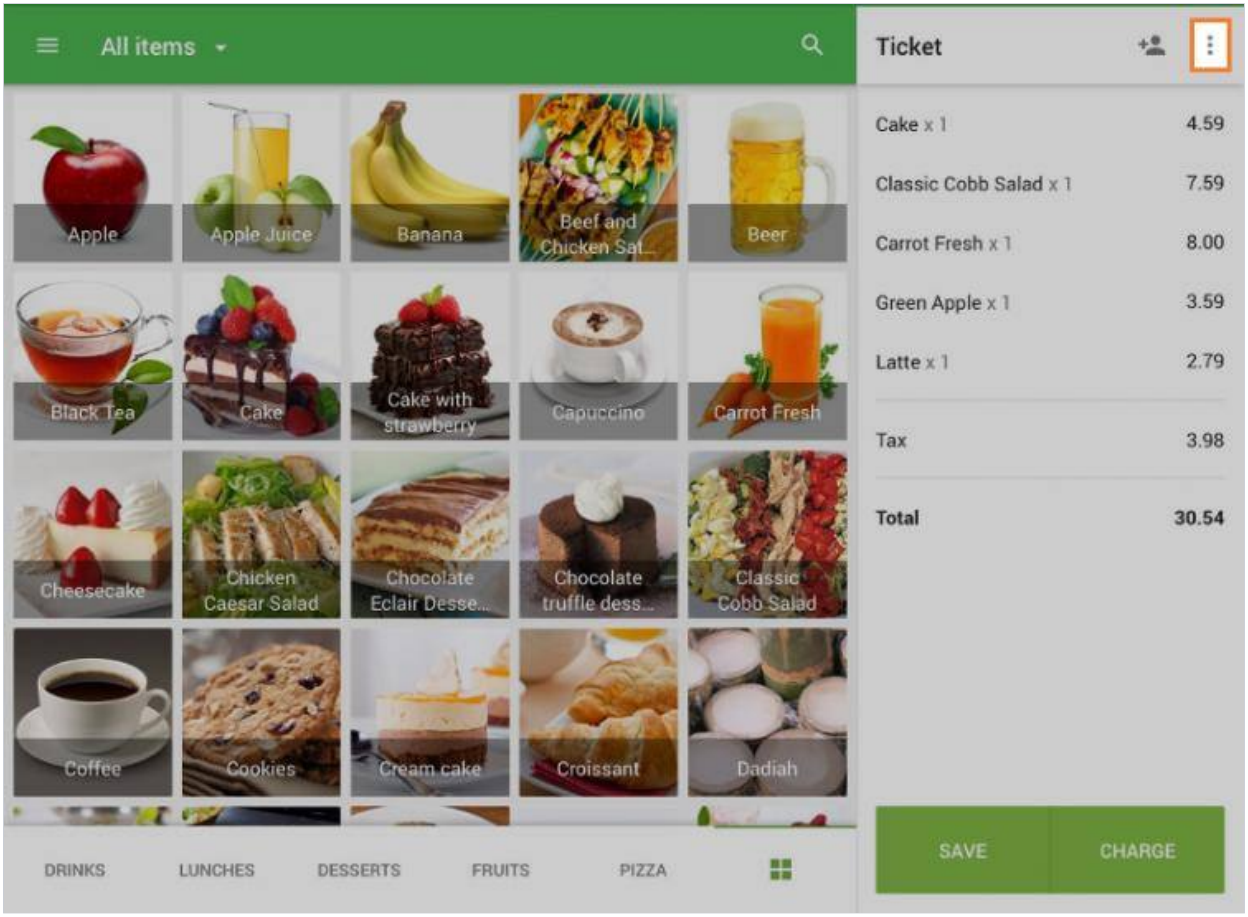
Video
https://www.youtube.com/watch?v=D3OIWTjol3w

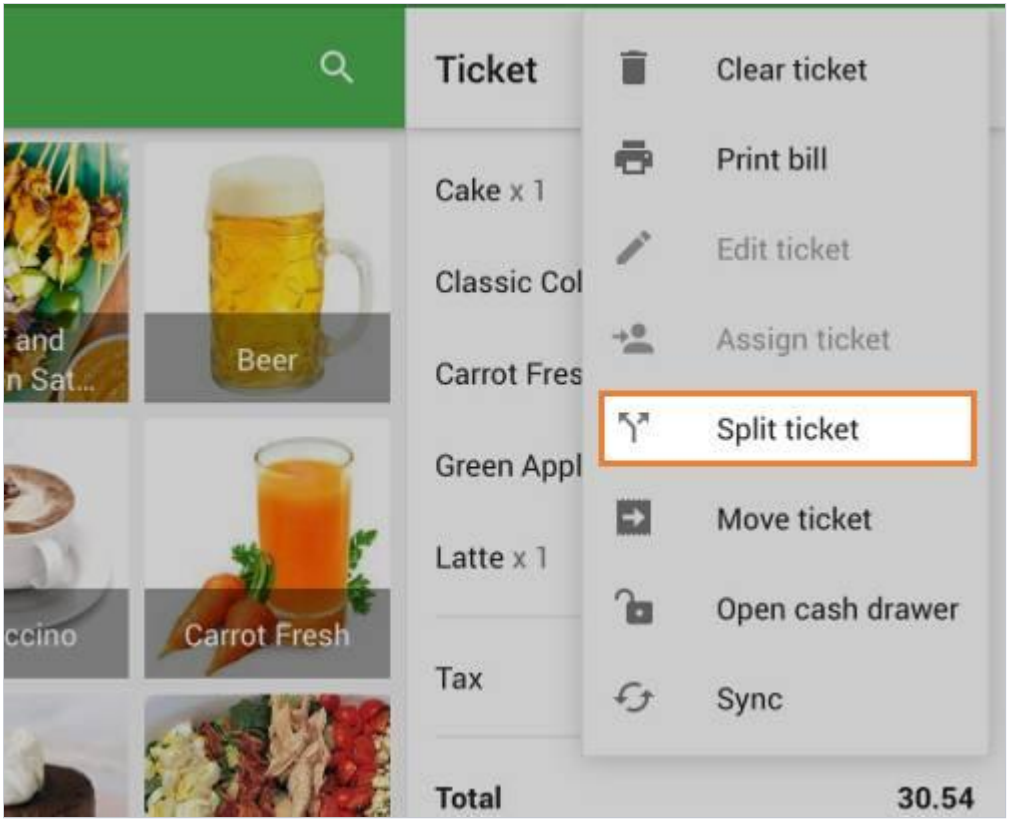
The **Split Ticket** feature allows a cashier to divide an existing open ticket into multiple new tickets. This is useful in cafes and restaurants when guests at the same table want to pay separately.

Before using this feature, make sure that the **Open tickets** option is activated in your **Back Office**.

1. Accessing the Split Ticket Option

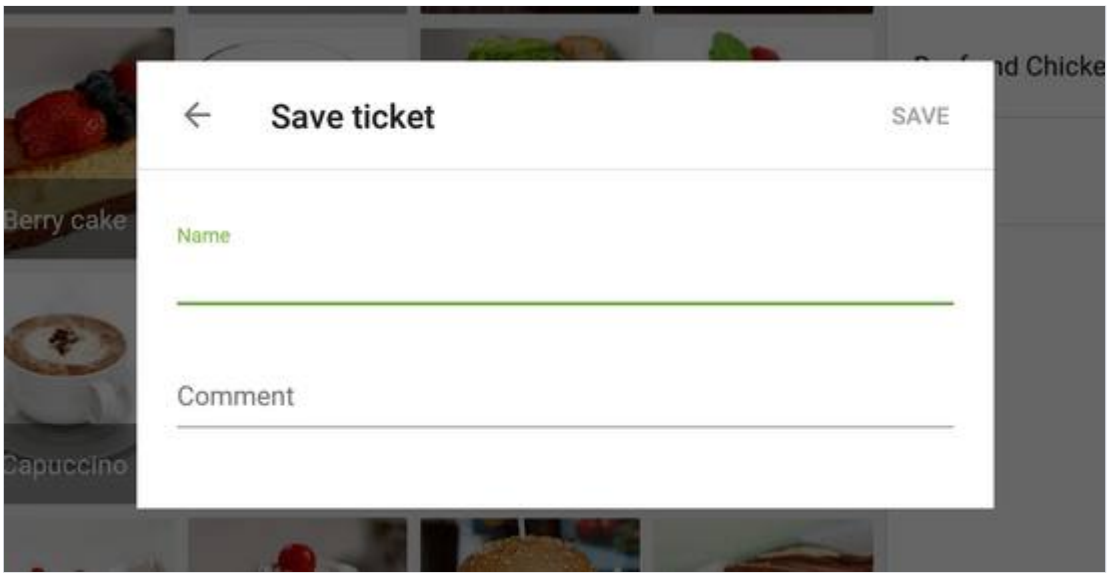
When working with an open ticket in the Loyverse POS app, tap the **three-dot menu (⋮)** in the top right corner of the sale screen and select **Split ticket**.


All items
Apple
Apple Juice
Banana
Beef and Chicken Sat...
Beer
Black Tea
Cake
Cake with strawberry
Capuccino
Carrot Fresh
Cheesecake
Chicken Caesar Salad
Chocolate Eclair Desse...
Chocolate truffle dess...
Classic Cobb Salad
Coffee
Cookies
Cream cake
Croissant
Dadiah
DRINKS
LUNCHES
DESSERTS
FRUITS
PIZZA
Ticket
Cake x 1 4.59
Classic Cobb Salad x 1 7.59
Carrot Fresh x 1 8.00
Green Apple x 1 3.59
Latte x 1 2.79
Tax 3.98
Total 30.54
SAVE
CHARGE


Ticket
Clear ticket
Print bill
Edit ticket
Assign ticket
Split ticket
Move ticket
Open cash drawer
Sync
Cake x 1
Classic Col
Carrot Fres
Green Appl
Latte x 1
Tax
Total 30.54
Beer
Carrot Fresh

2. Naming the Ticket

A dialog box will appear asking you to set the **ticket name**. You can keep the automatically generated name or enter a custom one.



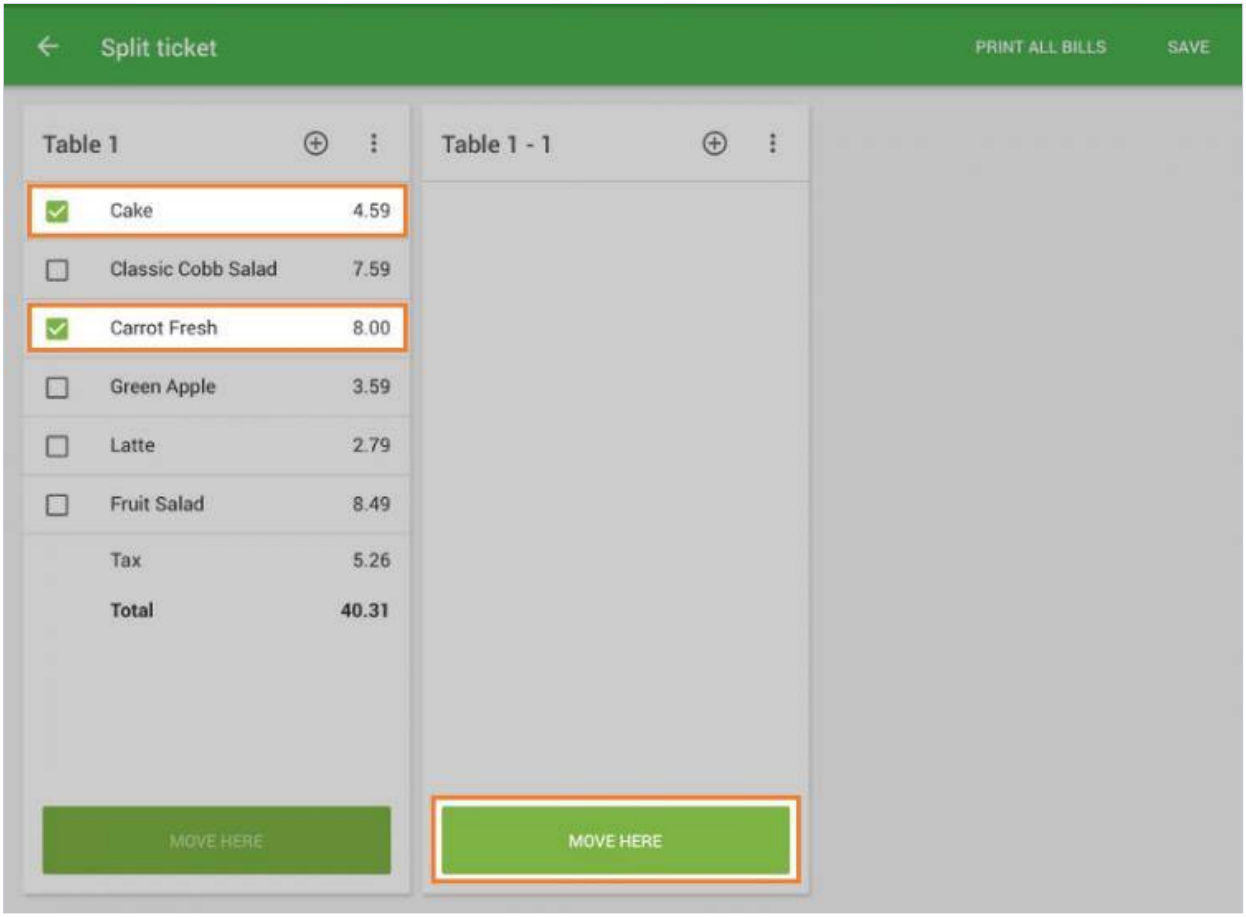
Here you can also **add a comment** to the ticket — for example, the customer's name or table number.

Click **Save** to continue.

3. Splitting Items Between Tickets

You will now see the **Split Ticket** screen, which shows:

- The **original ticket** on the left.
- A **new ticket** on the right.



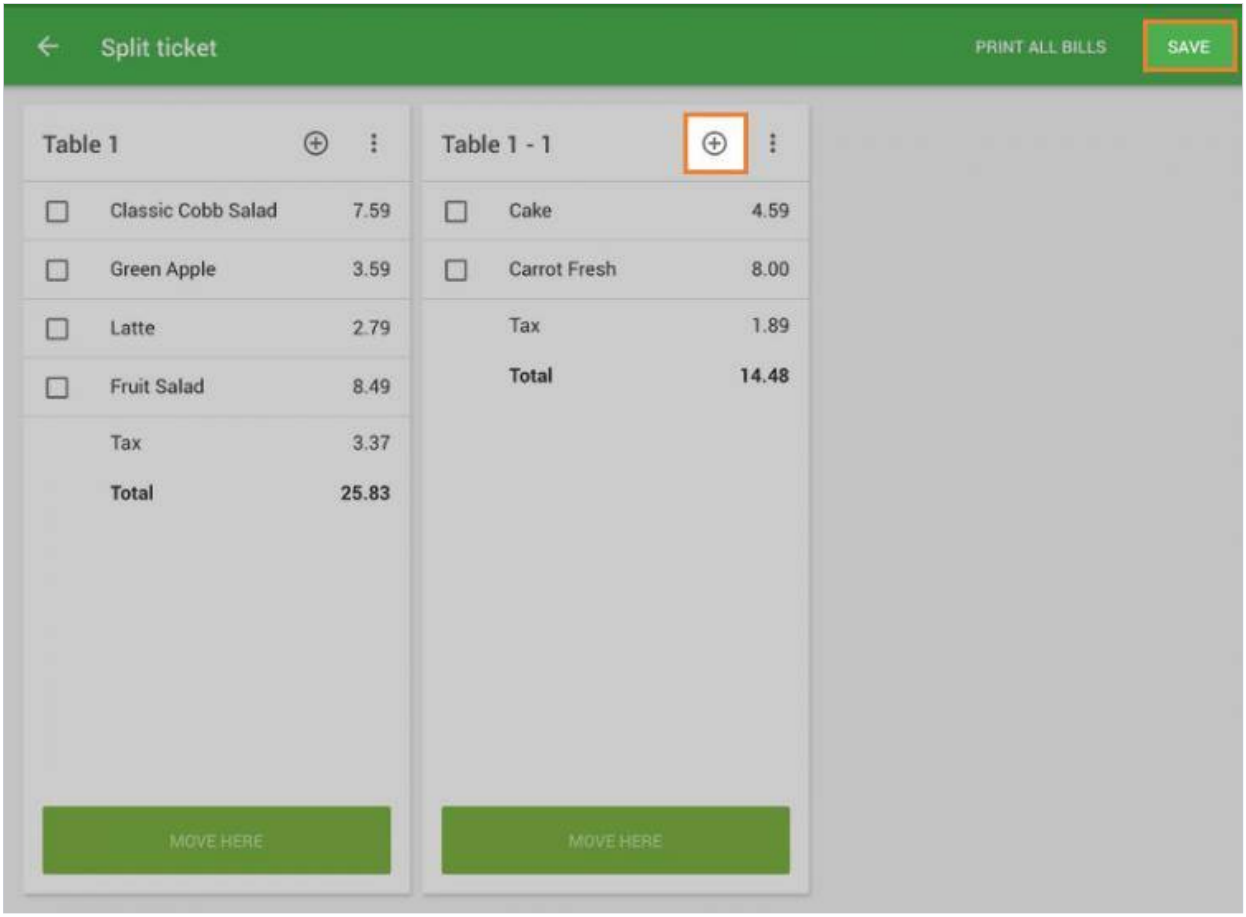
To move items:

1. Tap to select the items you want to transfer.
2. Tap **Move here** to send them to the new ticket.

You can repeat this process until all desired items are distributed.

4. Adding More Tickets

If you need more than two tickets, tap the ⊕ **(plus)** icon to create additional tickets.

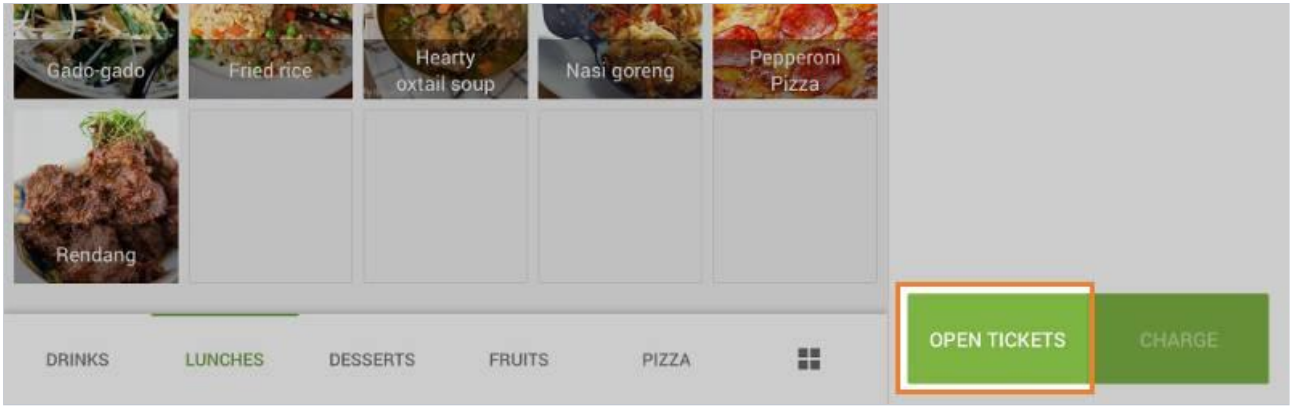


- New tickets will be numbered sequentially (1, 2, 3, etc.).
- You can create up to **20 tickets**.
- Tickets with no items will not be saved.

When finished, tap **Save** to confirm your split tickets.

5. Working with Split Tickets

After saving, each split ticket becomes a separate **open ticket**.
You can find and manage them by tapping **Open tickets** from the sale screen.



From there, you can continue editing, adding items, or closing each ticket at payment.

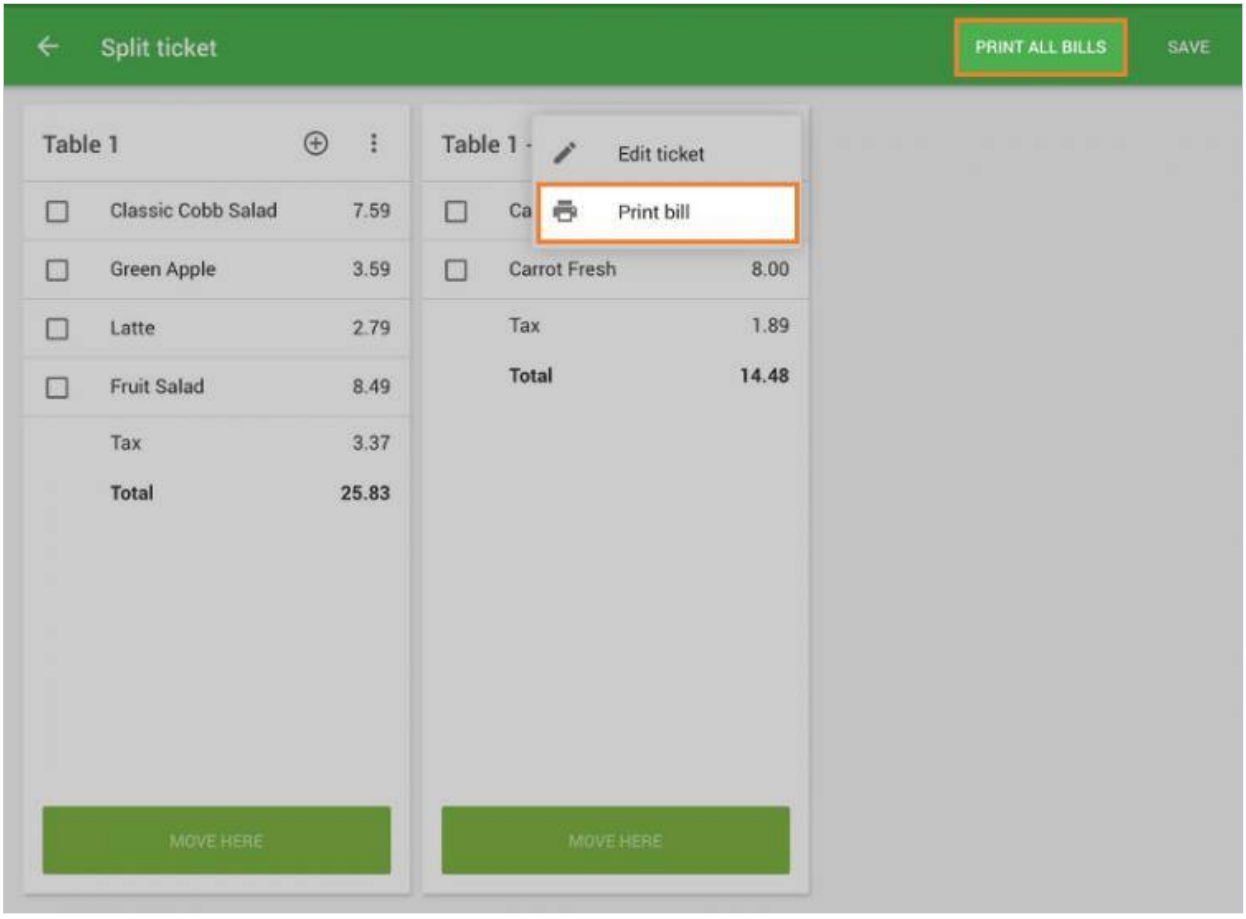
6. Notes on Discounts, Modifiers, and Taxes

- All **modifiers, comments, discounts**, and **taxes** applied to individual items will move with those items to the new ticket.
- **Percentage discounts** applied to the whole original ticket will automatically apply to all new tickets.
- **Amount discounts** applied to the original ticket can be manually moved to any ticket, just like items.

7. Printing Bills (Optional)

If you have a printer connected, you can print:

- A bill for each split ticket individually, or
- Bills for all tickets at once, directly from the Split Ticket screen.



You have successfully split an open ticket into multiple separate tickets, allowing customers to pay individually while keeping all order details and modifiers intact.

See also:

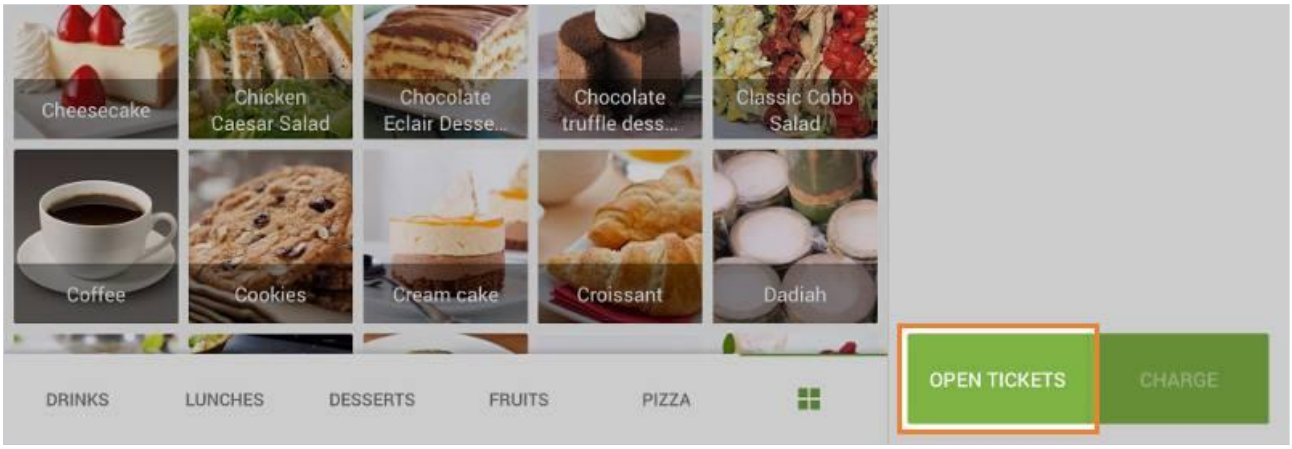
How to Merge Open Tickets with Loyverse POS

Video
https://www.youtube.com/watch?v=D3OIWTjol3w

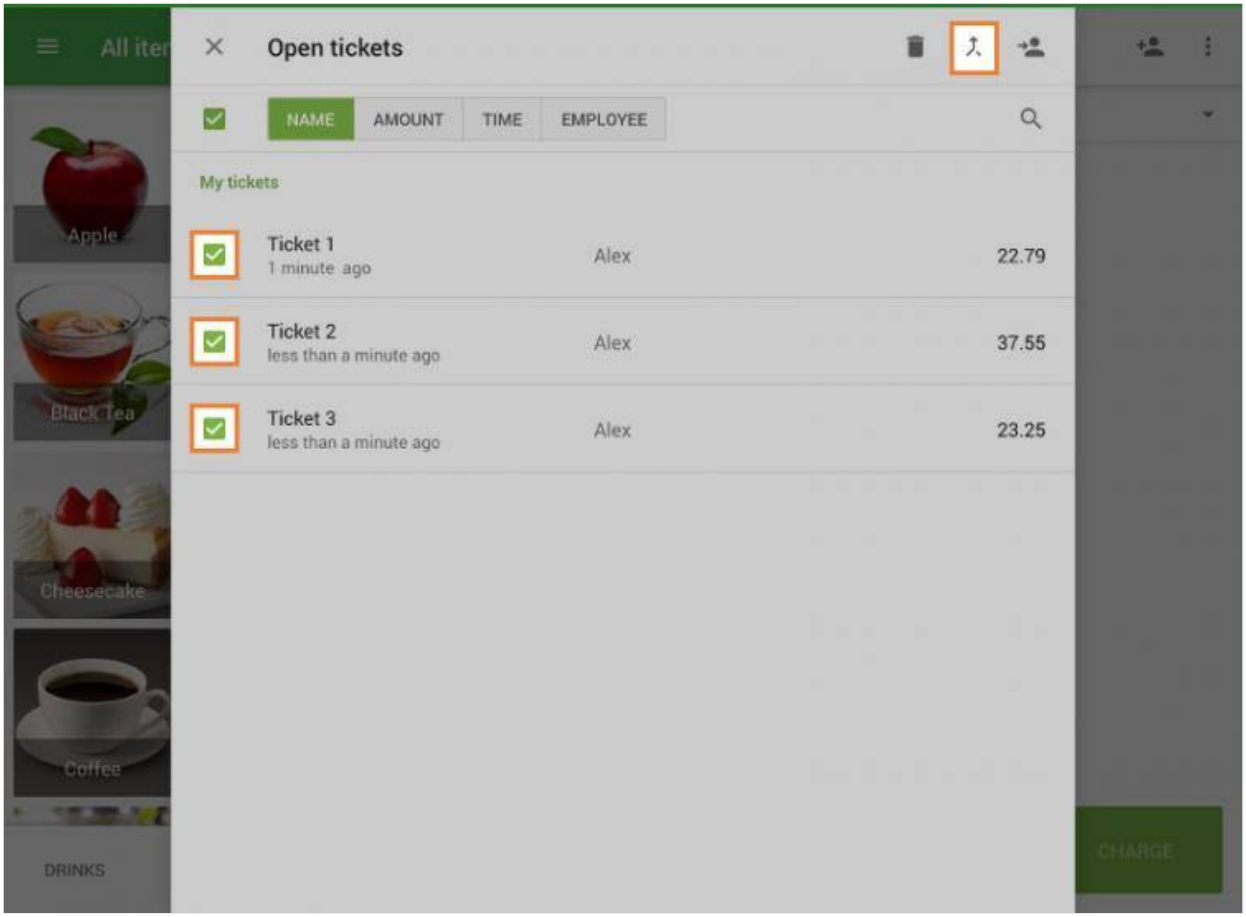
The **Merge Tickets** function allows cashiers to combine items from multiple open tickets into a single ticket.
Before you start, ensure that the **Open tickets** option is activated in your **Back Office** (see Open ticket setup).

1. Merging Tickets from the Open Tickets List

From the sale screen, tap **Open tickets** to view all active tickets in the shop.



Select the tickets you want to merge by marking the checkboxes on the left side of each ticket.



Tap the **Merge** icon in the upper right corner.

Select a name for the ticket from the existing tickets being merged.



Tap **Merge** to save the combined ticket.

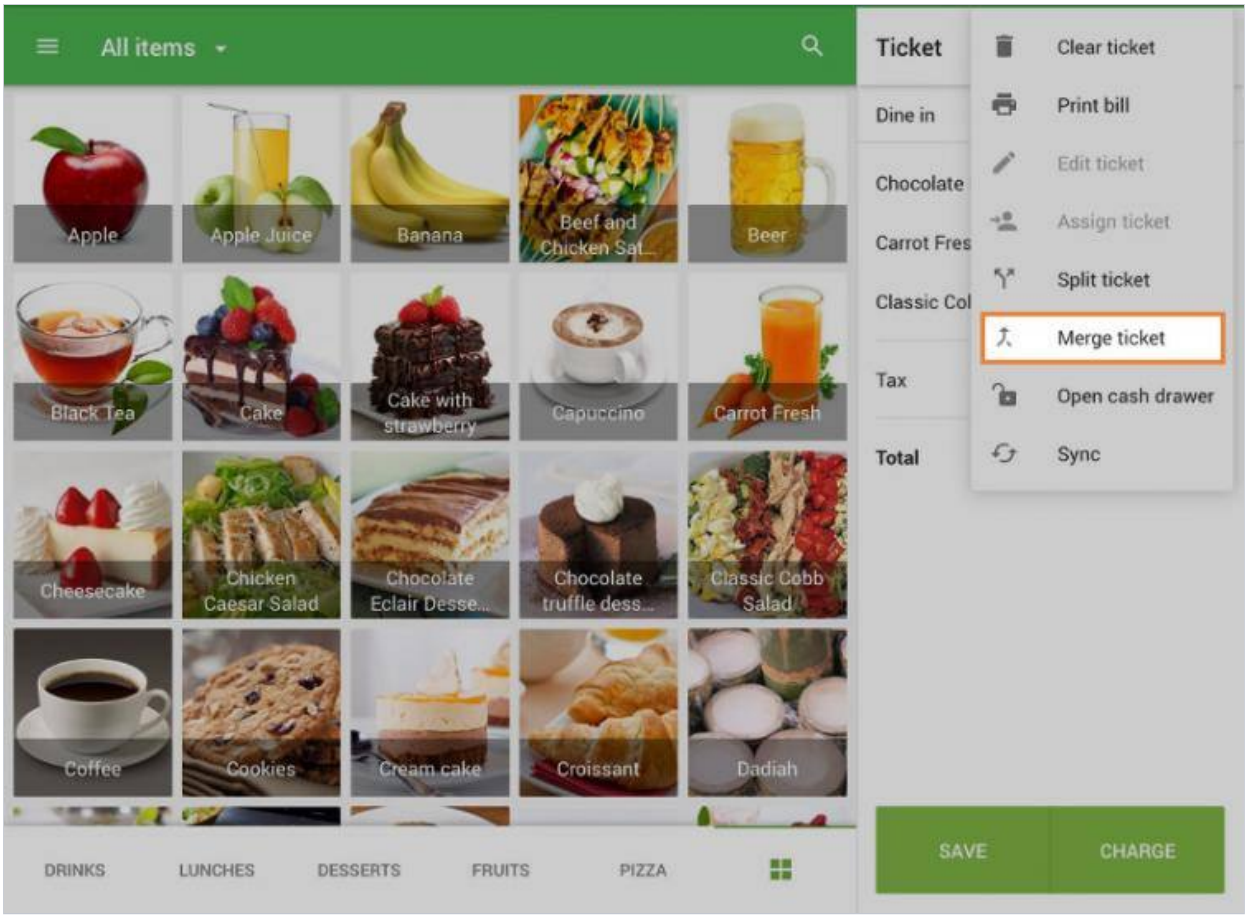
The selected tickets will be merged into one, and the resulting ticket will appear in the open tickets list.

2. Merging Tickets from the Sale Screen

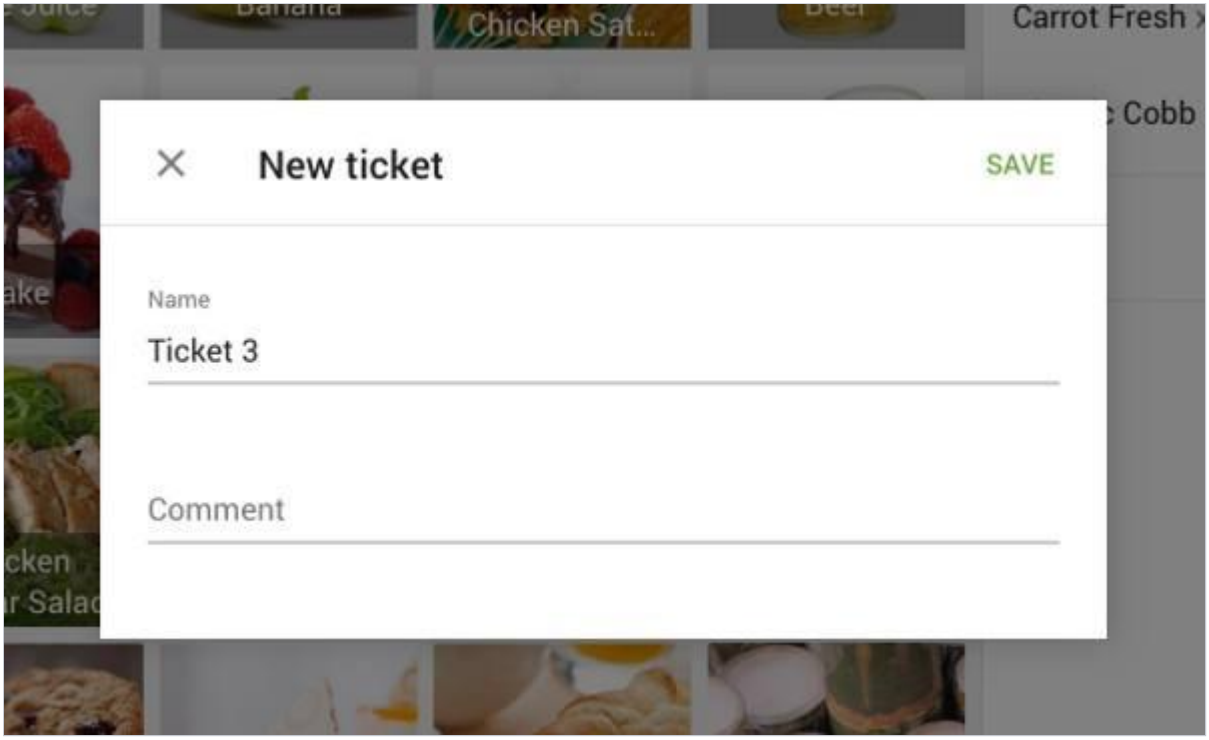
You can also merge a ticket directly while working on it.

On the sale screen, tap the **three dots menu (⋮)**.

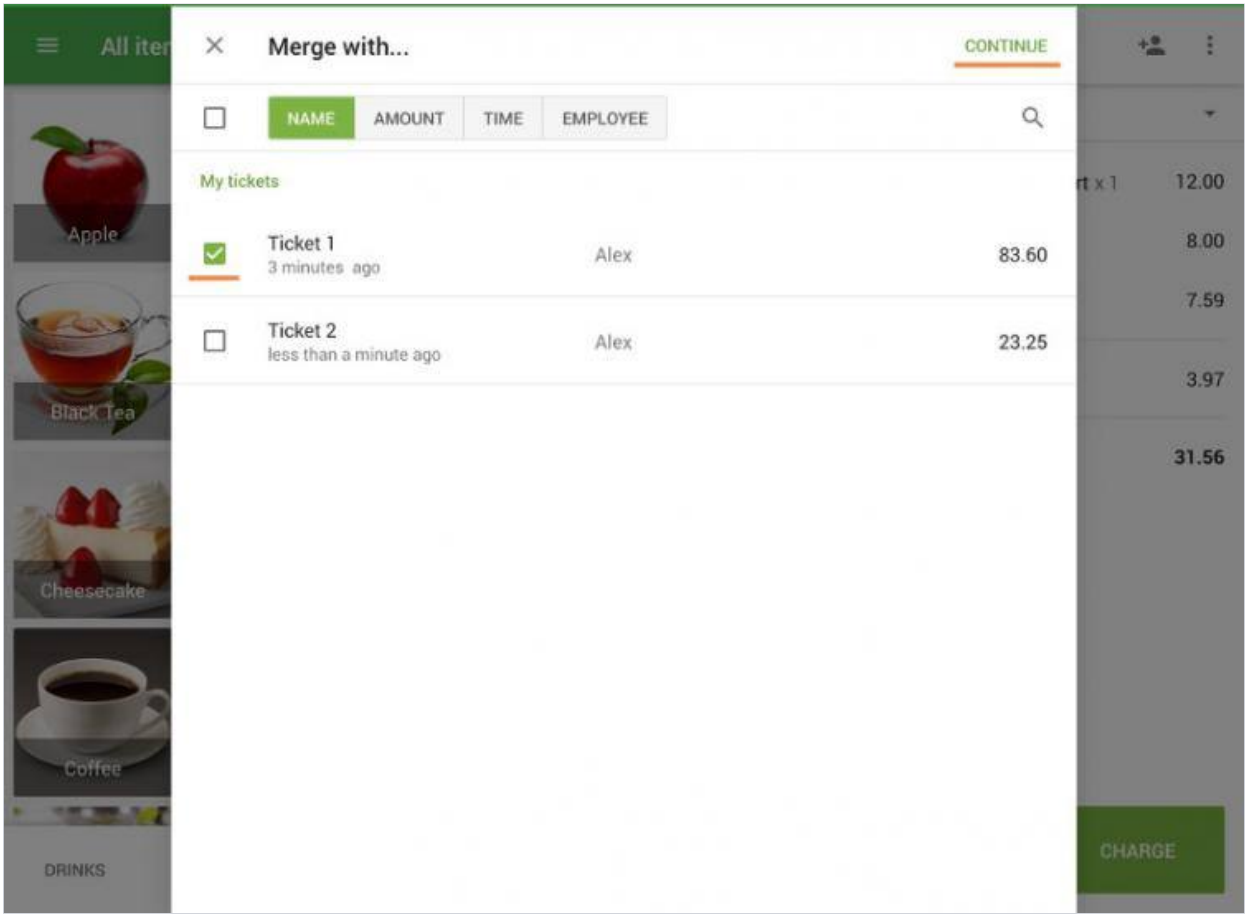
Select **Merge ticket**.



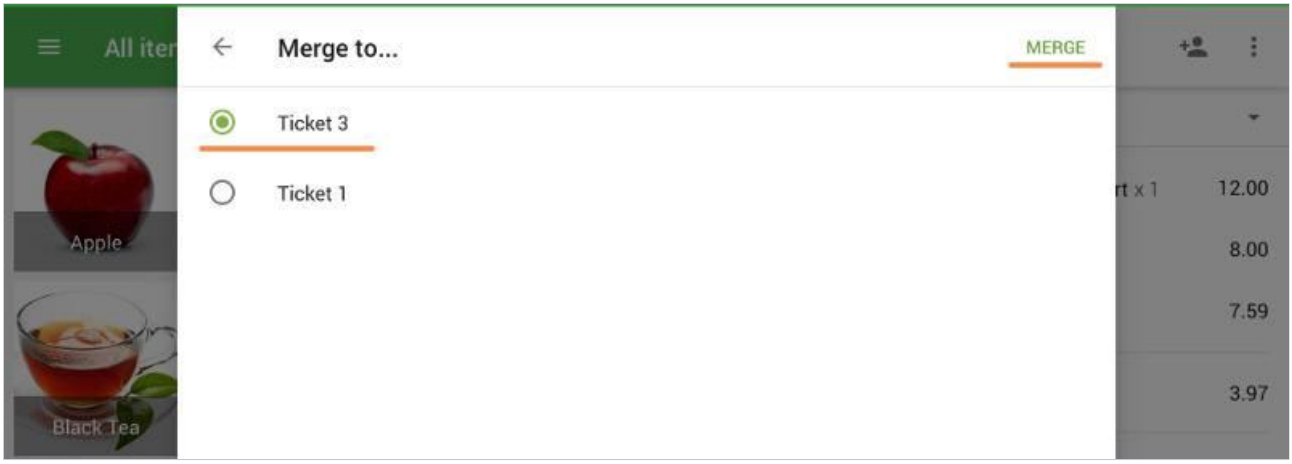
In the pop-up window, you can edit the ticket's name and add a comment if needed. Tap **Save**.



Select the target ticket(s) you want to merge with your current ticket, and then tap **Continue** in the upper right corner.



Select a name for the merged ticket and tap **Merge** to complete the process.



The newly merged ticket will now be available in the open tickets list.

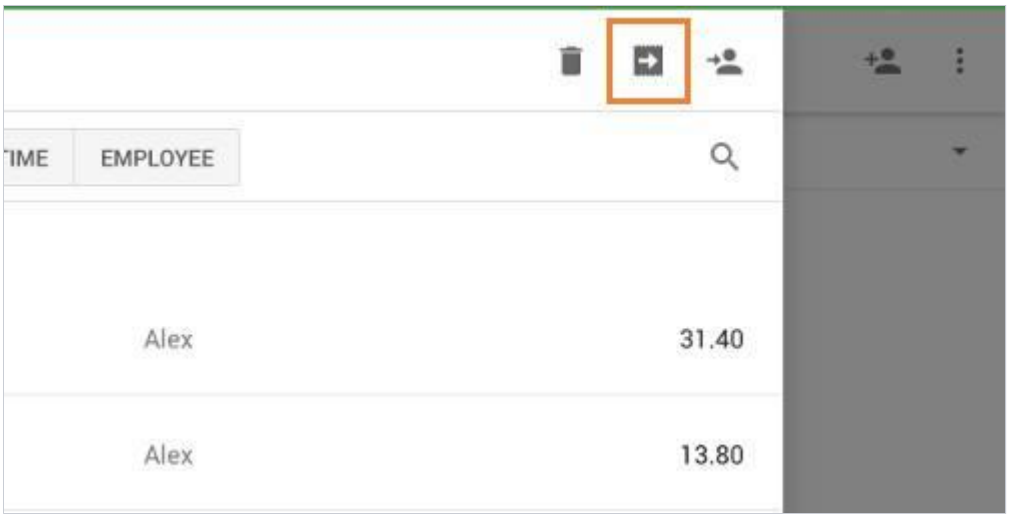
Important Notes

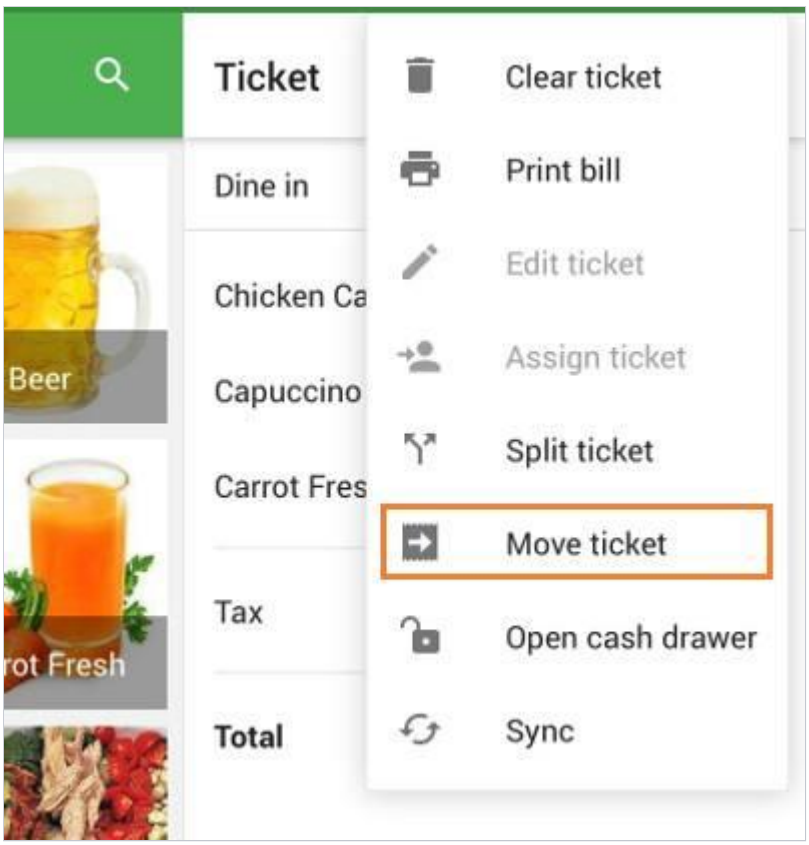
All **modifiers, comments, item-level discounts**, and **taxes** remain attached to their items when merged.

Percentage and **Amount** discounts applied to whole tickets will also transfer to the merged ticket.

If you have enabled **Predefined tickets**, the option will appear as **Move ticket** instead of Merge ticket.

- The process is the same, but instead of combining tickets, you move one ticket into another predefined one.





See also:

How to Split an Open Ticket with Loyverse POS

How to Use Predefined Open Tickets

How to Use Predefined Open Tickets to Name Tables

Video
https://www.youtube.com/watch?v=D3OIWTjol3w

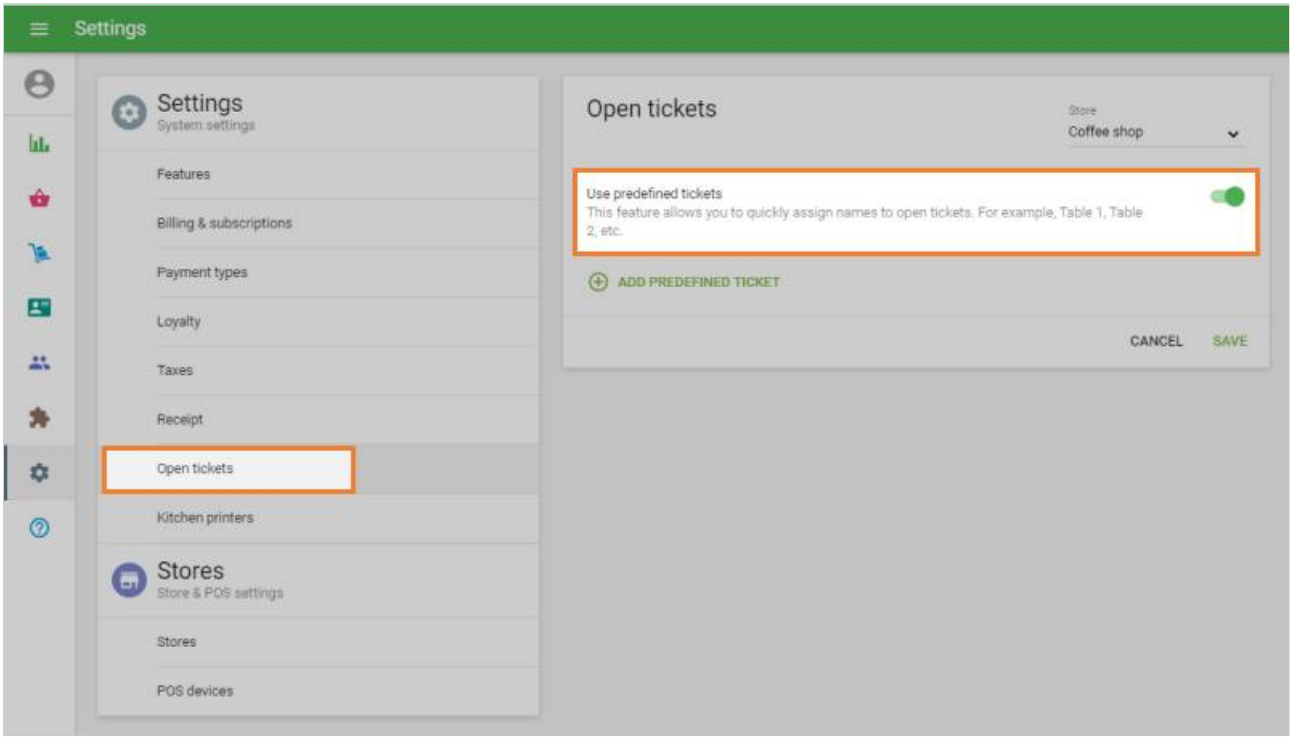
The **Predefined Open Tickets** feature allows you to quickly assign preset names—such as **Table 1, Table 2,** etc.—to open tickets. This is especially useful for cafes and restaurants working with table service.

Before using this feature, make sure the **Open tickets** option is enabled in your **Back Office**.

1. Configuration

Log in to your **Back Office**.

Go to **Settings → Open tickets**.

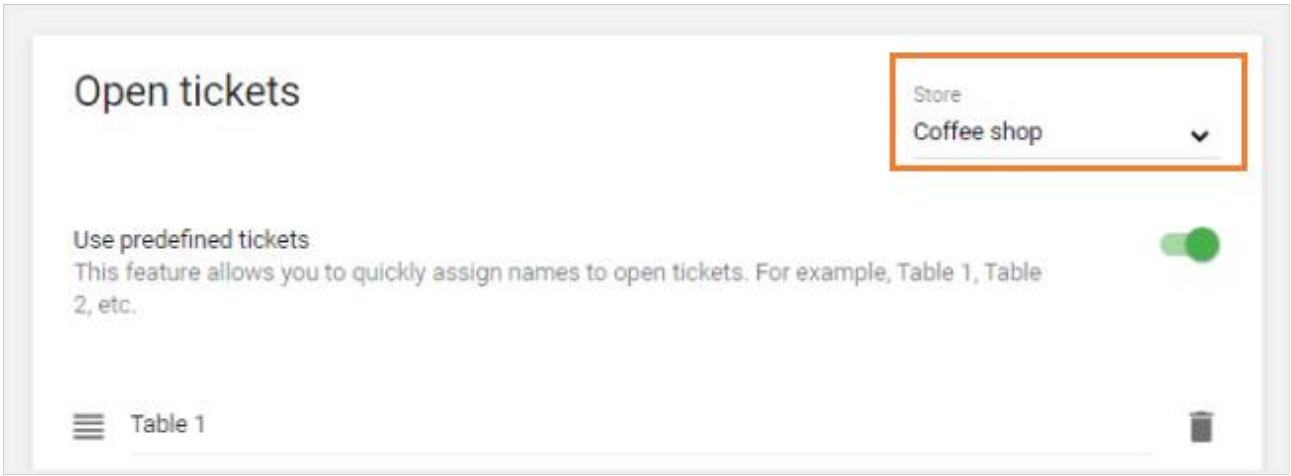


Enable the **Use predefined tickets** option.

You can now create predefined ticket names:

- Click **Add predefined ticket**.
- Enter a name, such as Table 1, Table 2, Table 3, etc.
- Save your changes.

If you have multiple stores, you can configure a separate set of predefined tickets for each location. Use the **store selector** at the top of the page to switch between stores.



2. Creating Open Tickets

During sales in the **Loyverse POS app**:

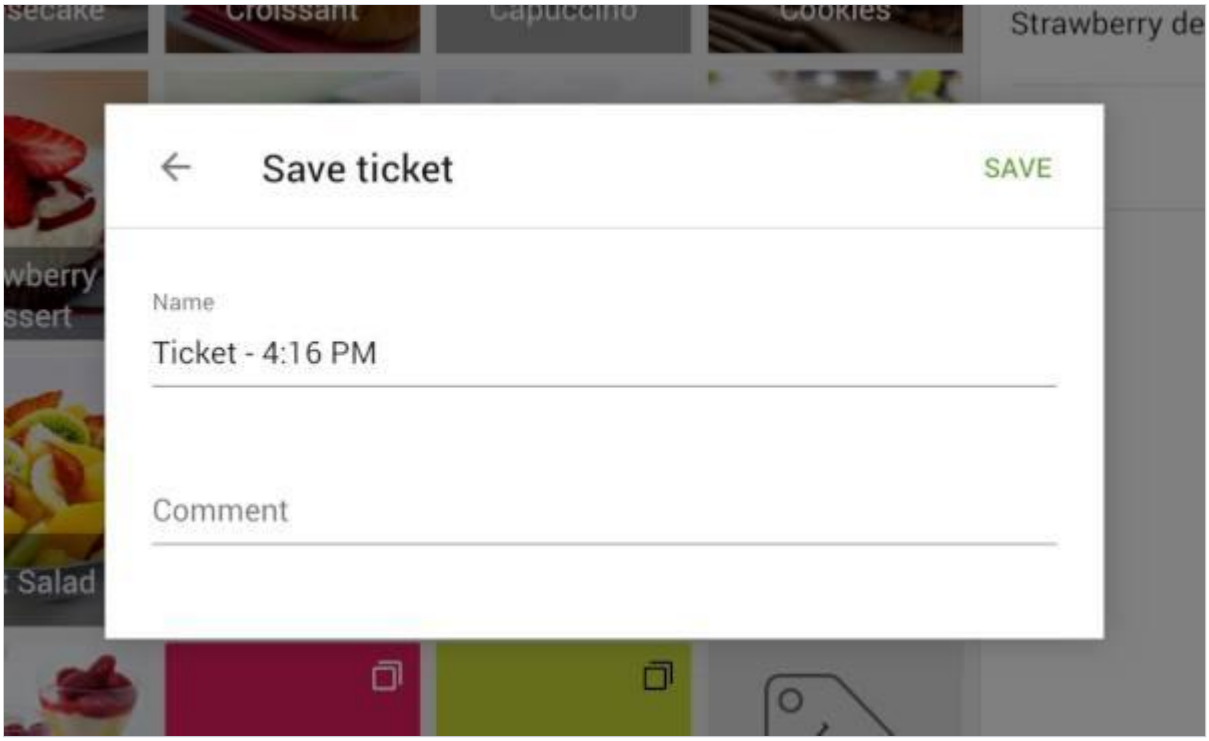
Add items to the ticket as usual.

Tap **Save** to create an open ticket.

On the next screen, you will see a list of available predefined ticket names.

- Select a predefined ticket name to assign it to your ticket.
- Only **unused** predefined tickets are displayed—occupied ones are hidden.

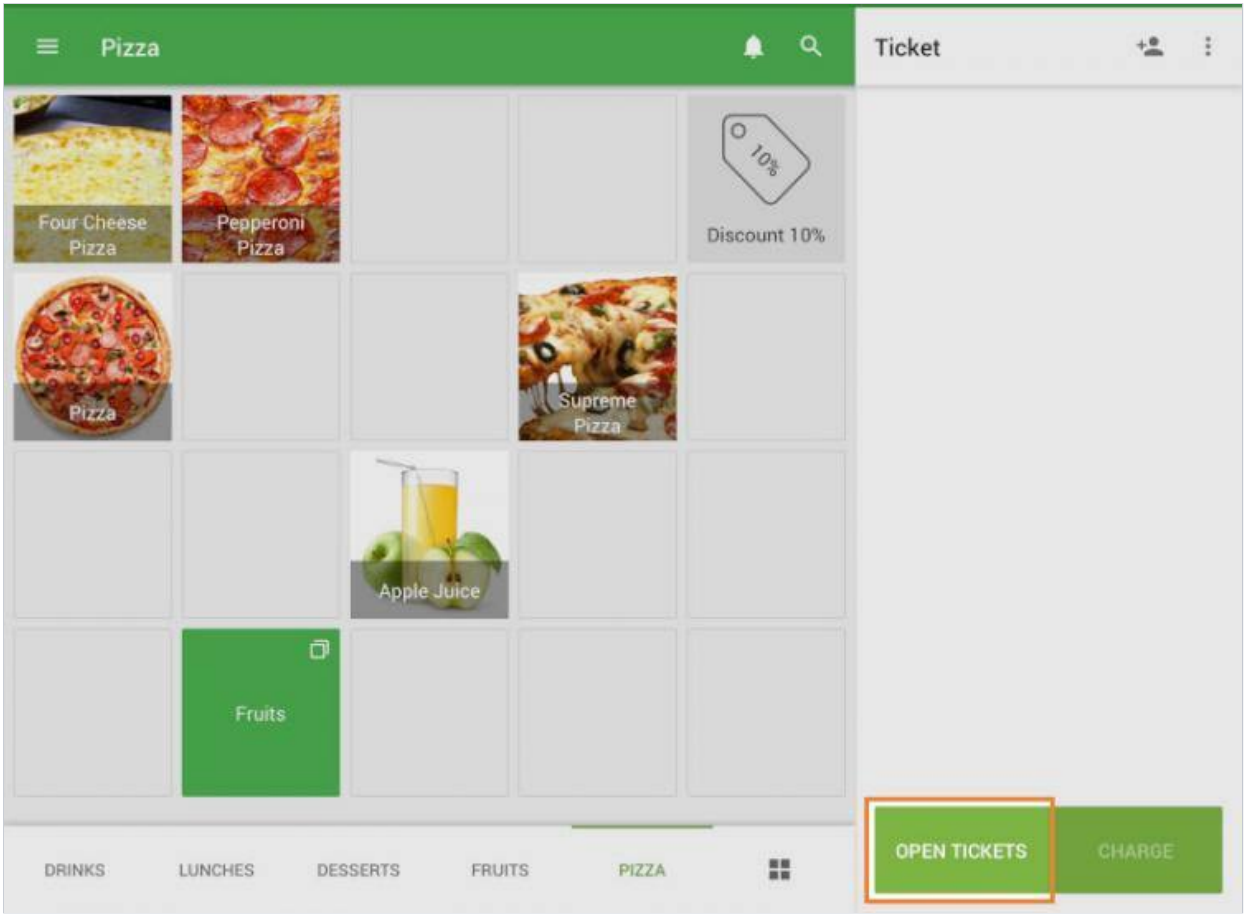
If you prefer not to use a predefined name, choose **Custom ticket** instead.
Enter the ticket's **Name** and **Comment**, then tap Save.



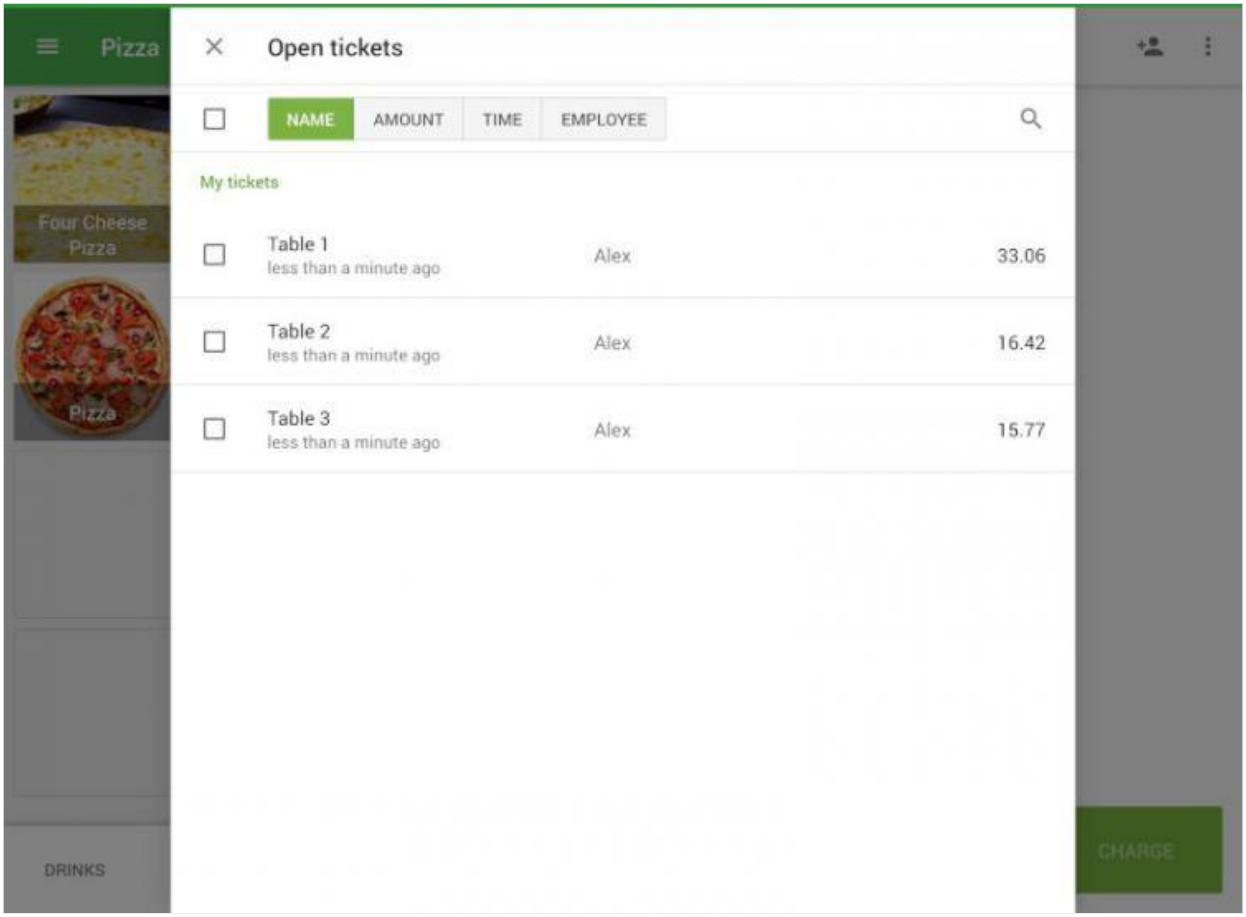
3. Editing Open Tickets

You can edit, split, or move predefined open tickets just like regular open tickets.

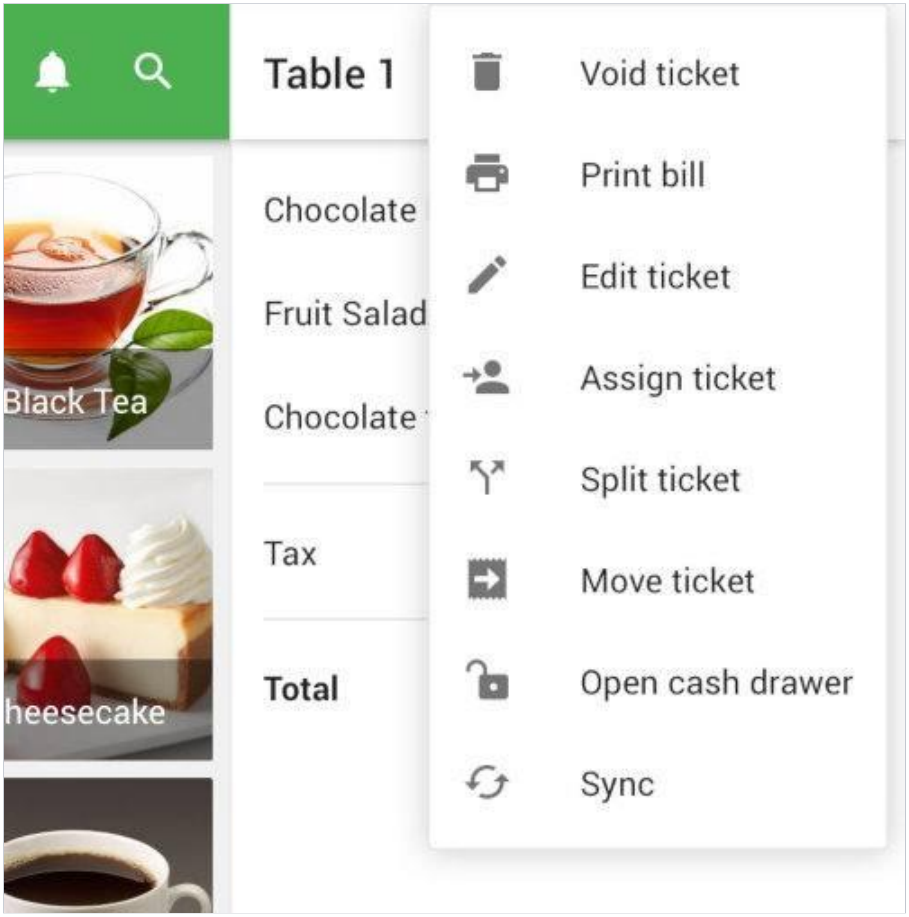
Tap **Open tickets** on the sale screen to view all active open tickets.



Select the ticket you want to modify.



Open the **three dots menu (⋮)** to choose one of the available actions:



Edit ticket

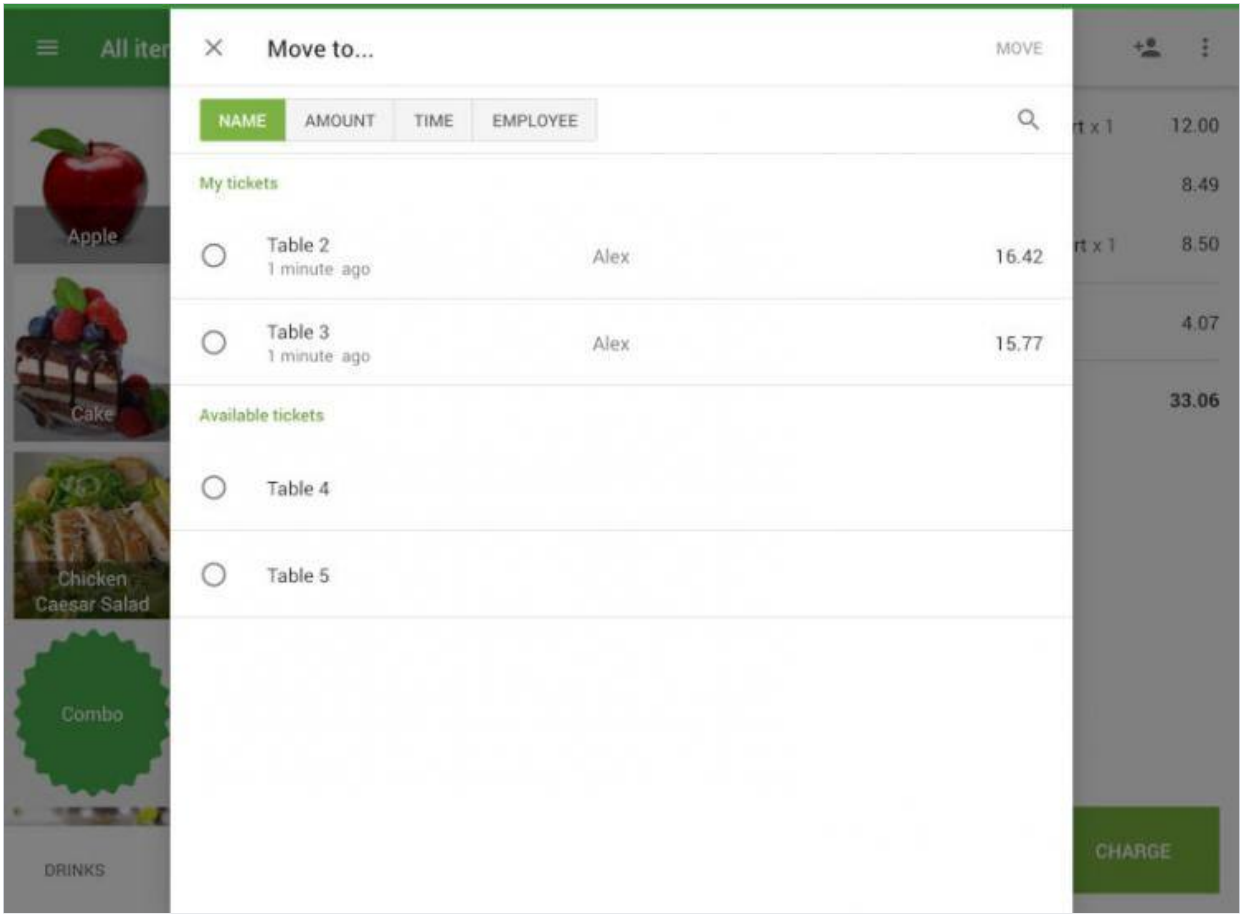
- Change the comment.
- Convert a predefined ticket into a custom one.

Split ticket

Splitting works the same way as with regular open tickets (see How to Split an Open Ticket with Loyverse POS).

Move ticket

Predefined ticket workflows use **Move ticket** instead of **Merge ticket**.



- Select **Move ticket**.
- Choose the destination ticket (either predefined or custom).
- Tap **Move** to transfer all items and details to the selected ticket.

See also:

Open Tickets

How to Split an Open Ticket with Loyverse POS

How to Merge Open Tickets with Loyverse POS

Open Tickets Synchronization

Video
https://www.youtube.com/watch?v=XG_55befx4E

The **Open Ticket Synchronization** feature allows multiple POS devices within the same store to access, edit, and close open tickets in real time.

This ensures seamless teamwork between employees and helps manage orders efficiently across several devices — for example, between a bar, kitchen, and cashier station.

1. Prerequisites

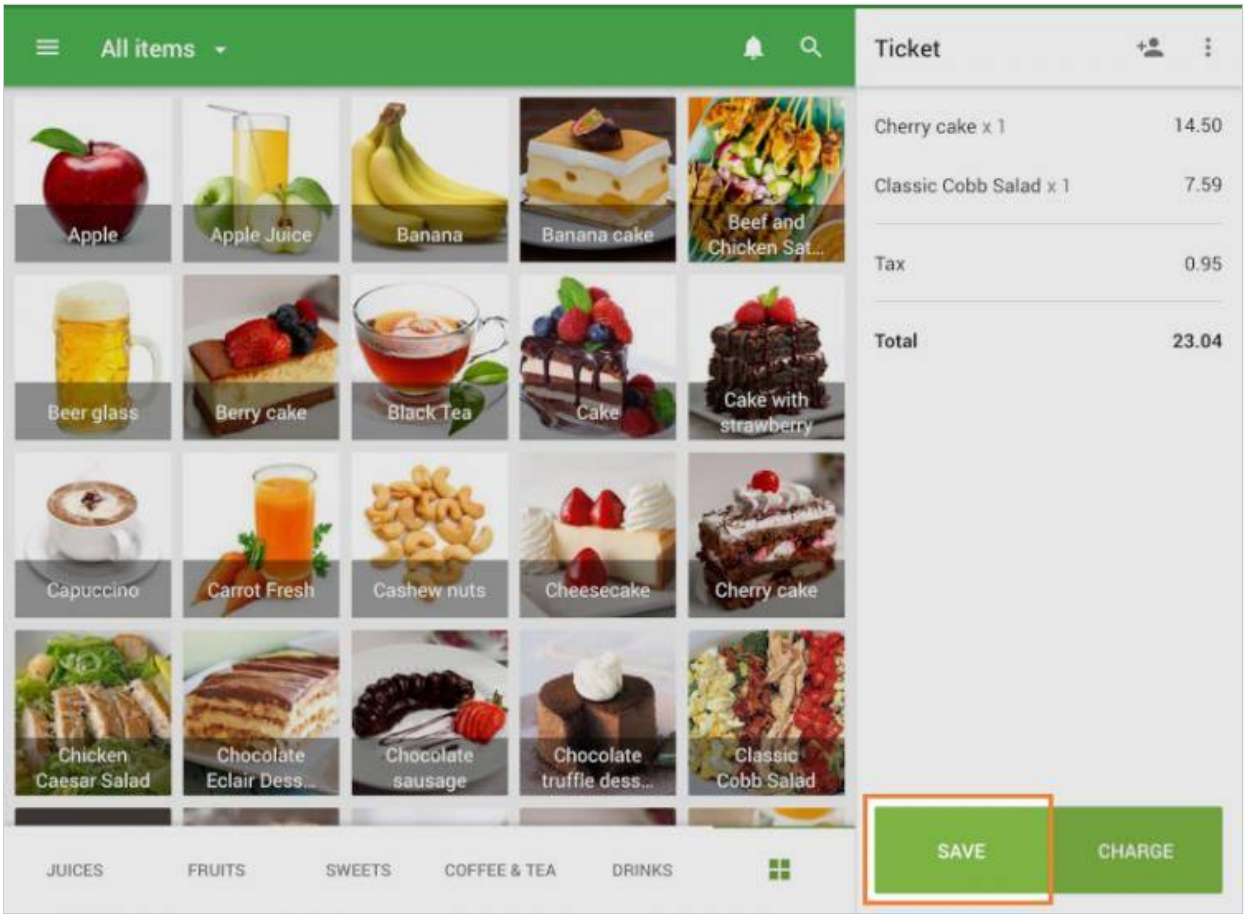
Before using open ticket synchronization:

- Make sure the **Open tickets** feature is activated in your Back Office (see How to Work with Open Tickets).
- All POS devices must be connected to the **internet** and belong to the **same store**.

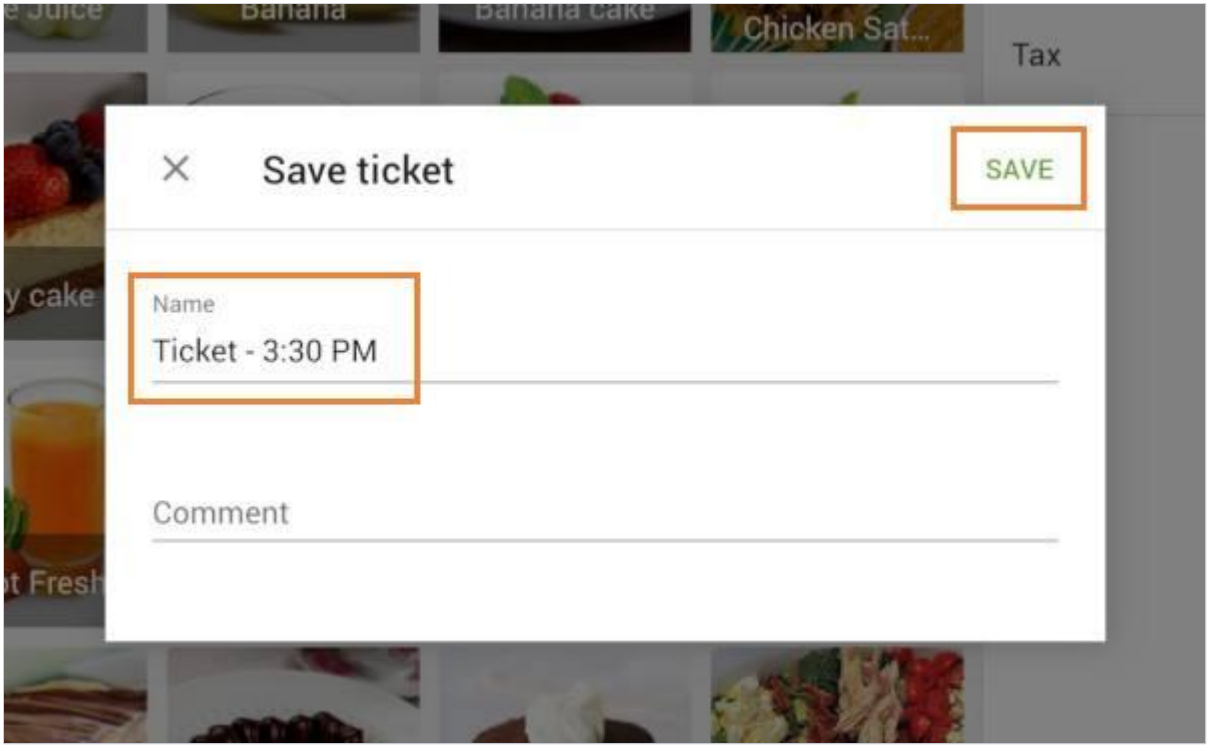
2. Creating and Saving an Open Ticket

Add items to the sale as usual on one POS device.

Tap the **Save** button to create an open ticket.



Enter a **ticket name** or select one from **predefined tickets**, if available.

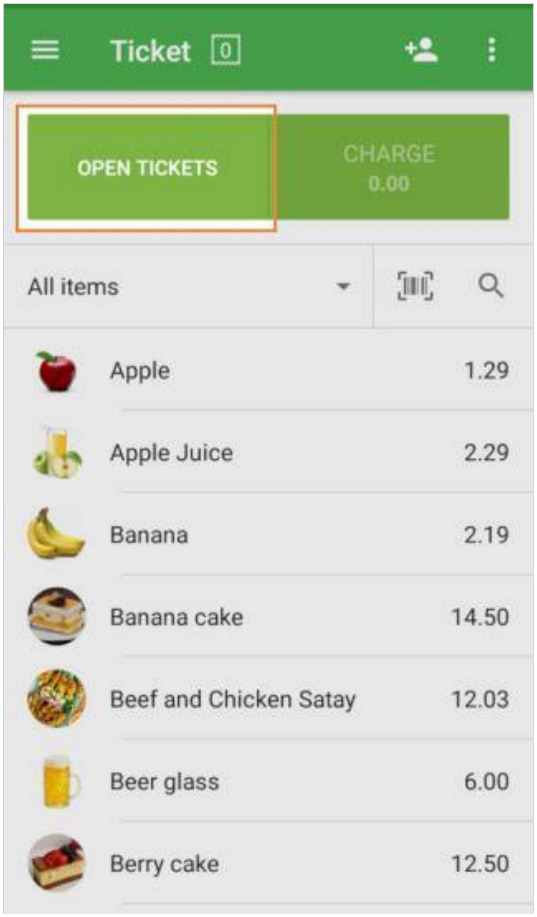


Tap **Save** to confirm.

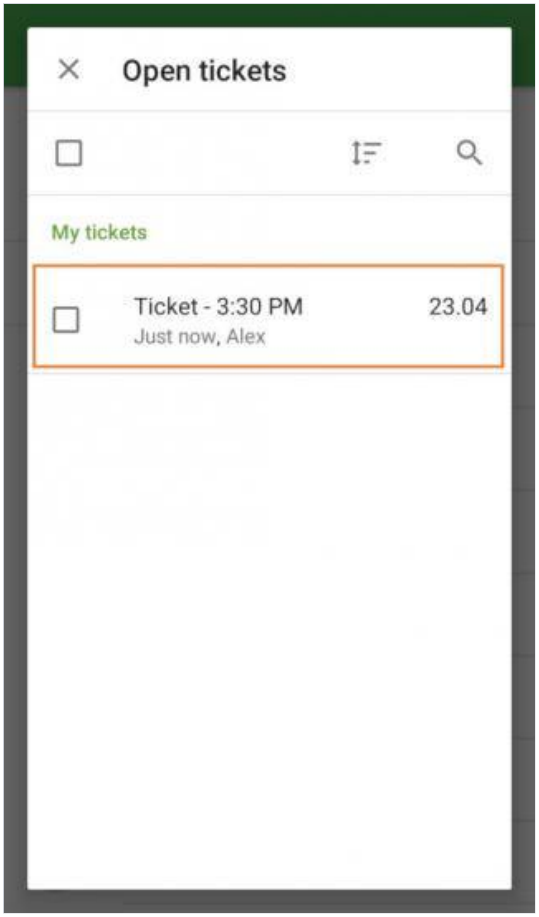
Your open ticket is now saved and synchronized across all POS devices in the same store.

3. Accessing Open Tickets from Another Device

On another POS device in the same shop, tap **Open tickets** from the sale screen.



You will see the list of all currently open tickets created on any device.



Select the desired ticket to open it.

You can now view, edit, or close this ticket directly from the new device.

4. Editing and Completing the Ticket

If needed, you can:

- Add or remove items from the open ticket.
- Apply discounts or comments.
- Continue serving the order from another location or device.

When the order is ready for payment:

1. Tap **Charge**.
2. Complete the sale as usual.

The ticket will be closed and automatically removed from the open ticket list on all devices.

Open Ticket Synchronization enables your team to work together efficiently — updating and finalizing shared orders from multiple POS terminals in real time.

See also:

Open Tickets

Discounts & Modifiers

How to Apply Discounts During a Sale

Video
https://www.youtube.com/watch?v=nTh66kU5Op0

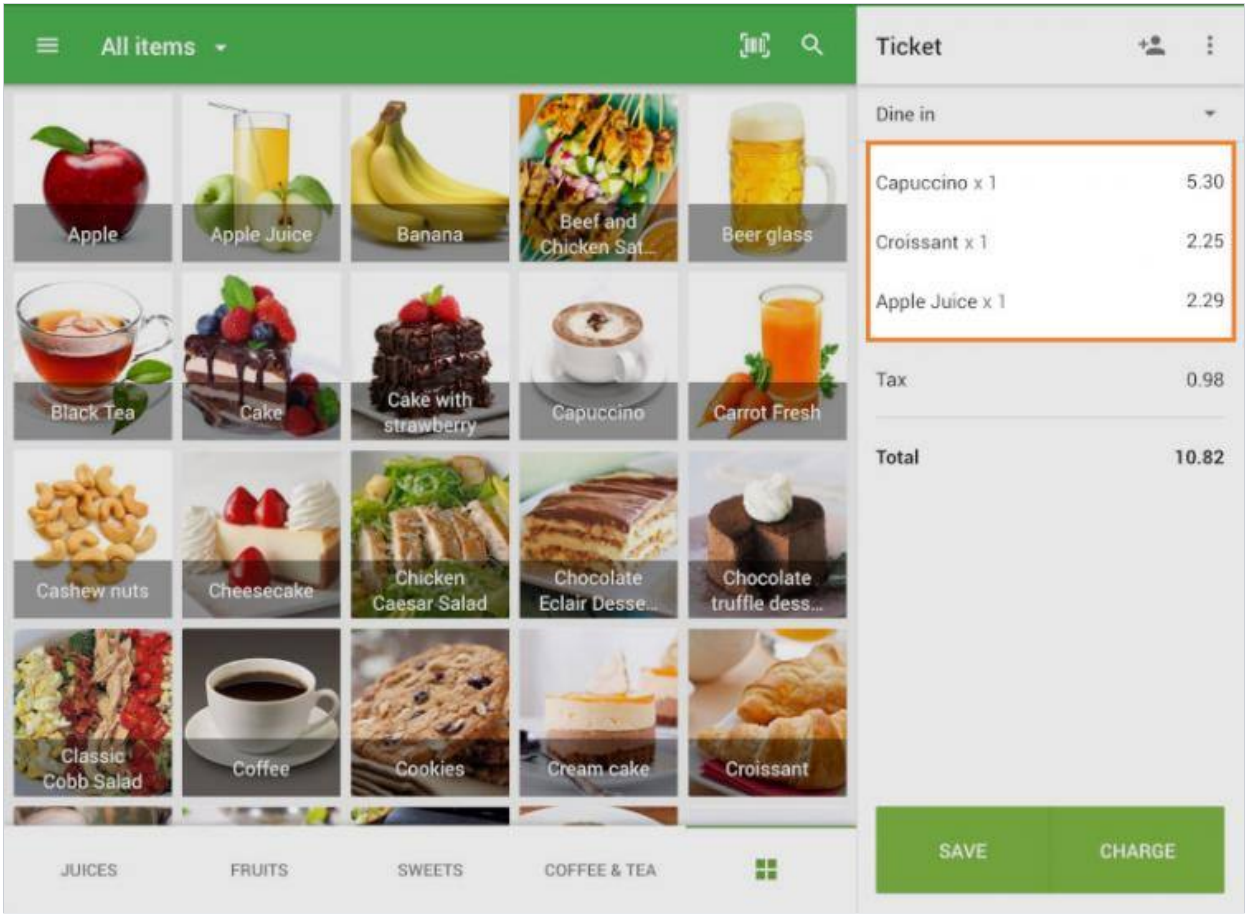
Before applying any discounts at the point of sale, make sure they are **created and configured** in the **Back Office** or the **Loyverse POS** app (Play Market or App Store).

Loyverse supports two types of discounts:

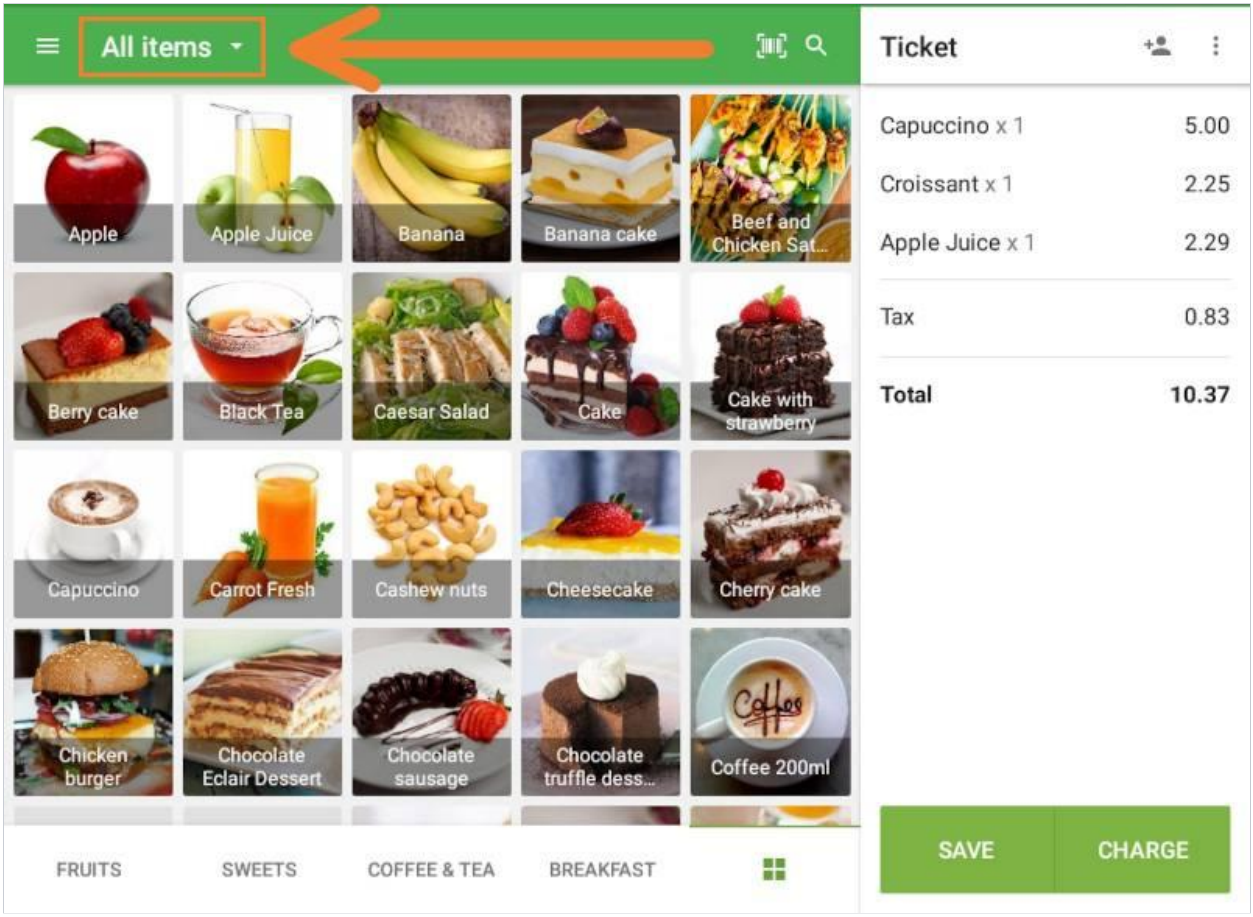
- **Percentage Discounts** – can be applied to **individual items** or the **entire ticket**.
- **Amount Discounts** – can be applied only to the **entire ticket**.

Applying a Discount to the Whole Ticket

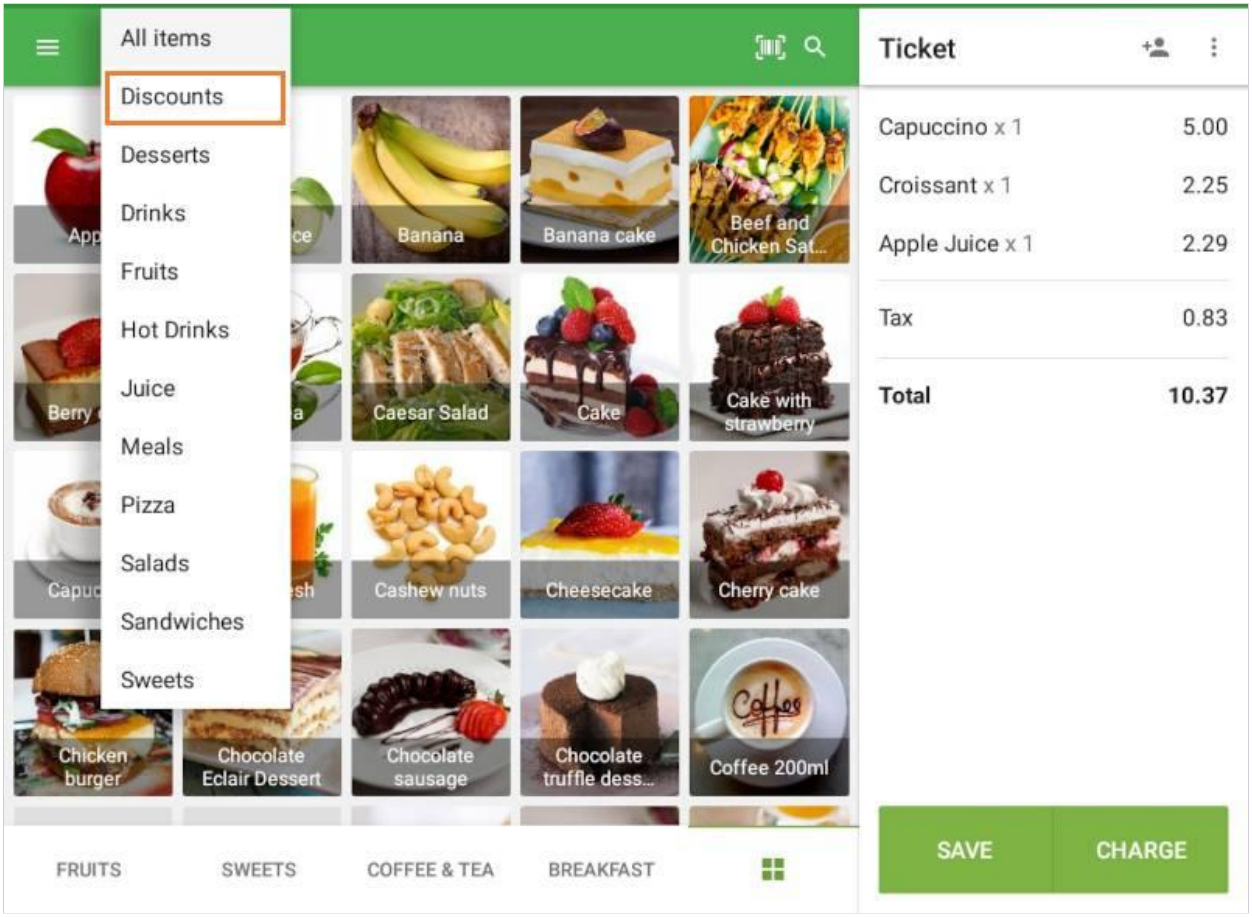
Add items to the ticket from the sales screen.



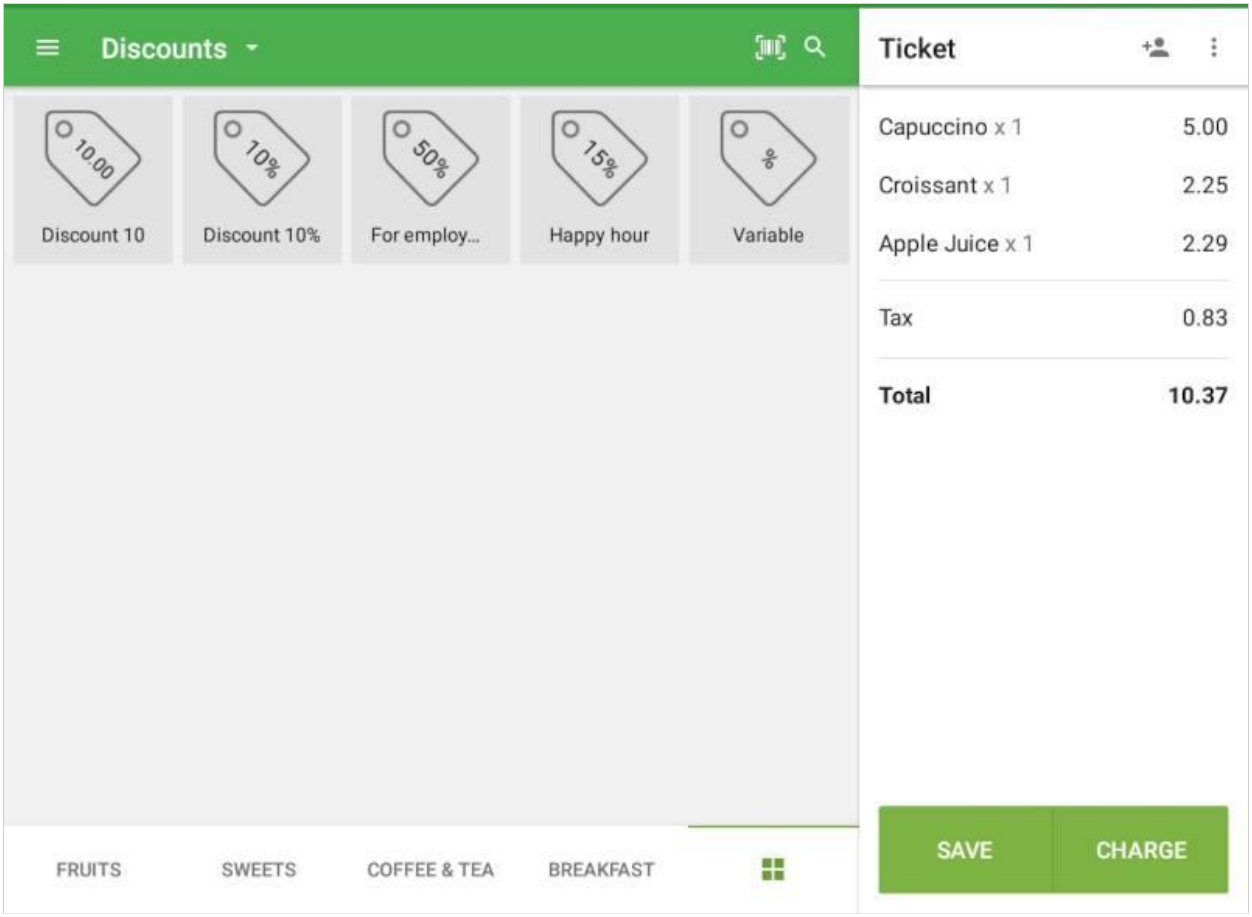
Tap the "**All items**" line at the top left of the ticket.



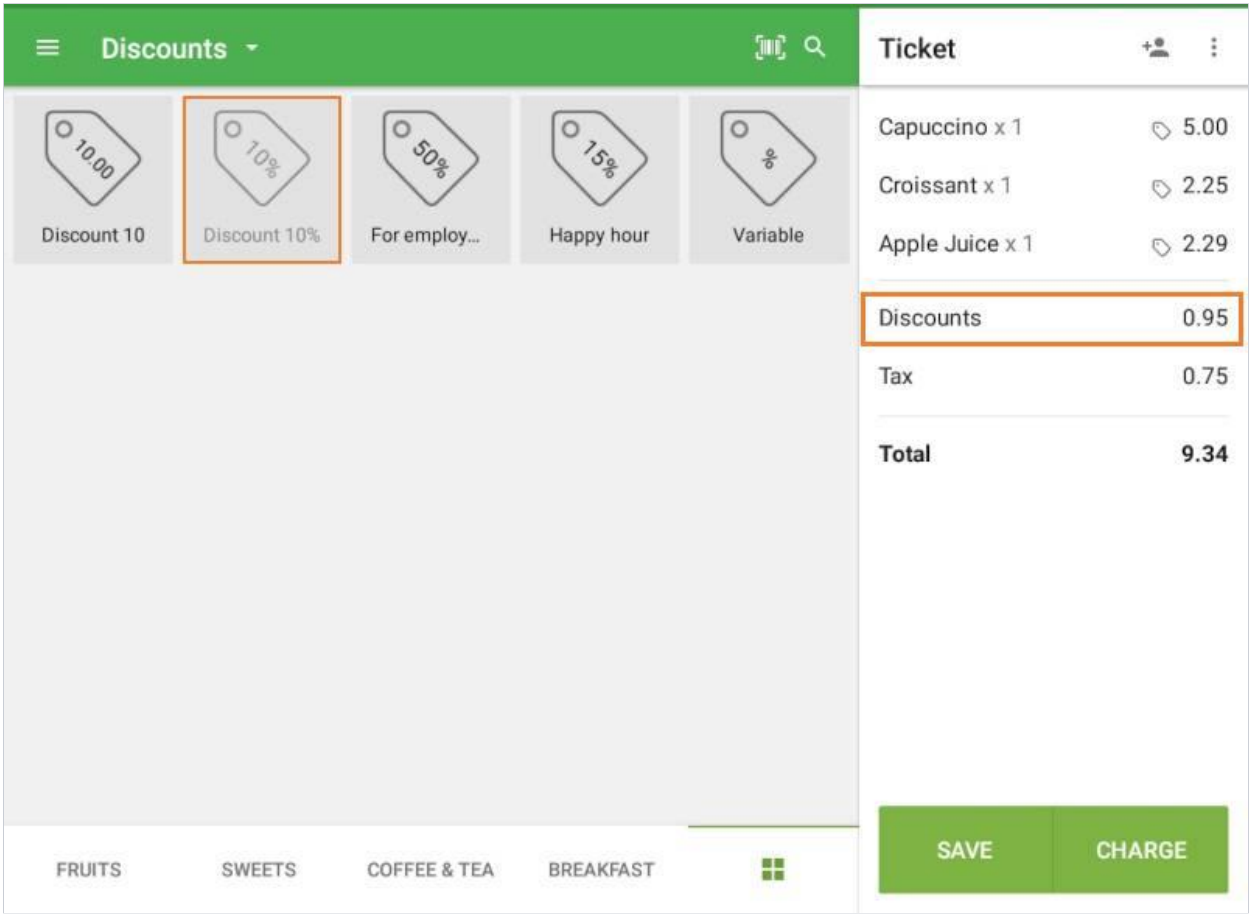
From the drop-down menu, select '**Discounts**'.



A list of your predefined discounts will appear. Tap the one you want to apply.

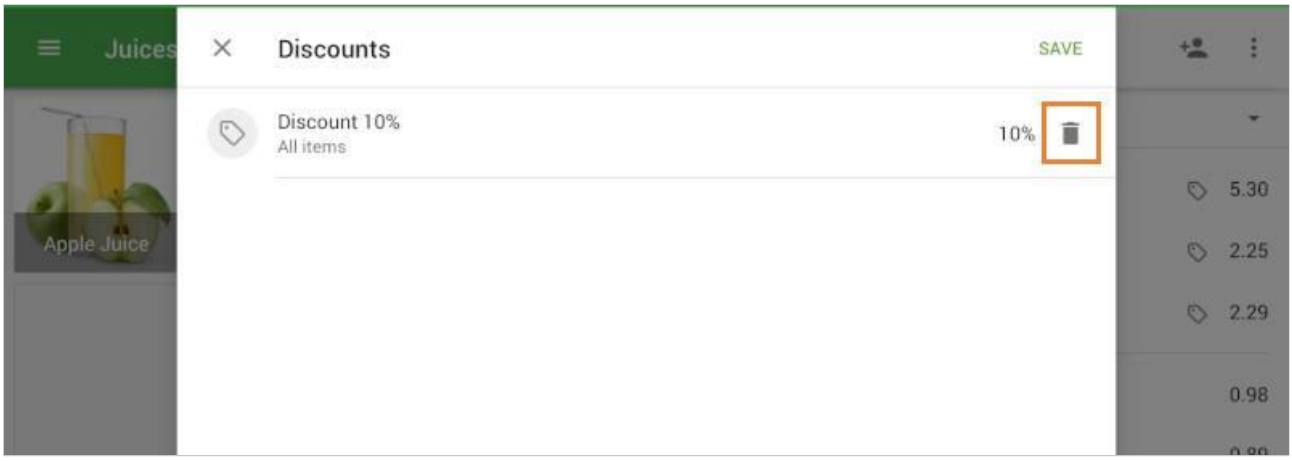


The discount will now be applied to the whole ticket and appear as a separate line.



To remove the discount:

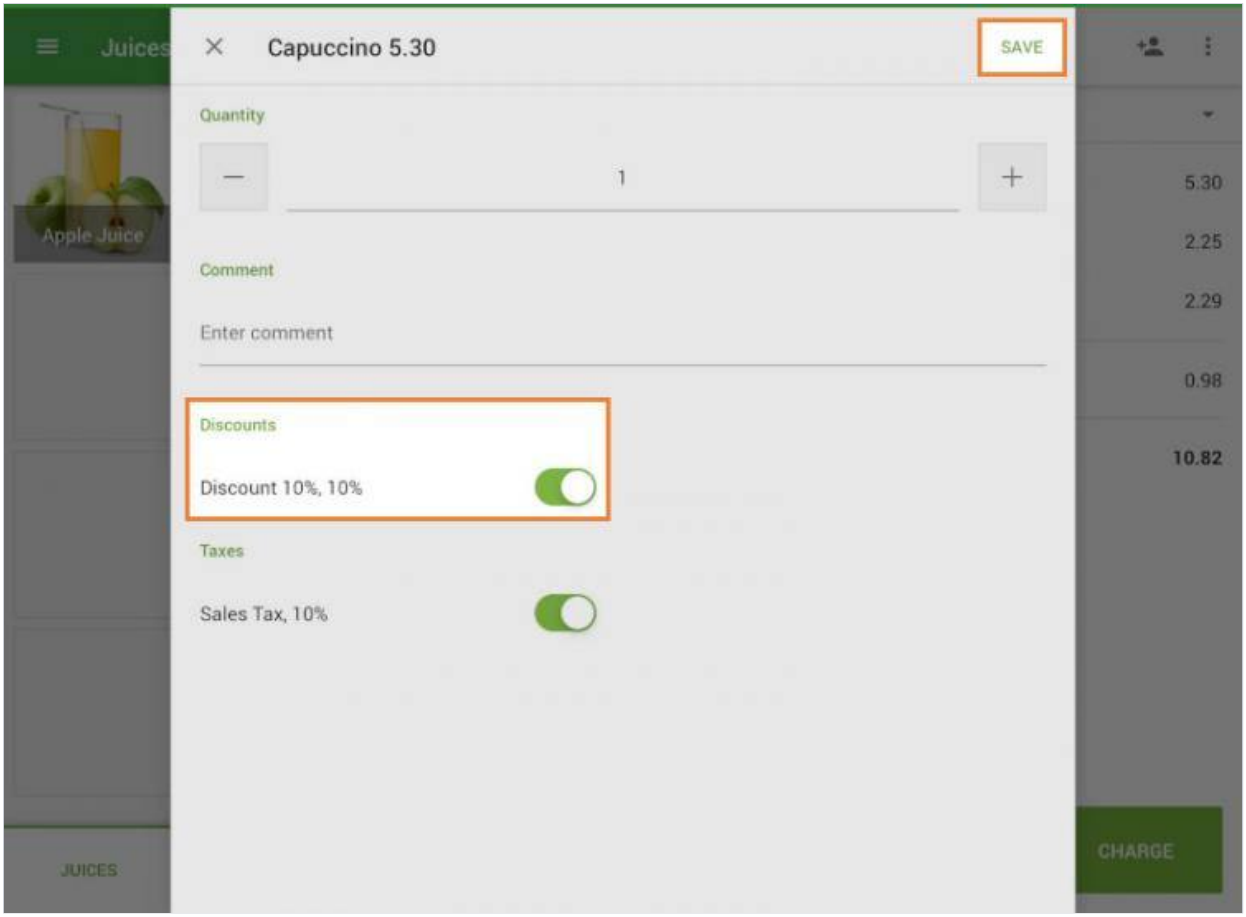
- Tap on the "**Discount**" line in the ticket.
- In the pop-up window, tap the **trash bin** icon to delete it.



Applying a Discount to a Specific Item

On the current ticket, tap the **item** you want to discount.

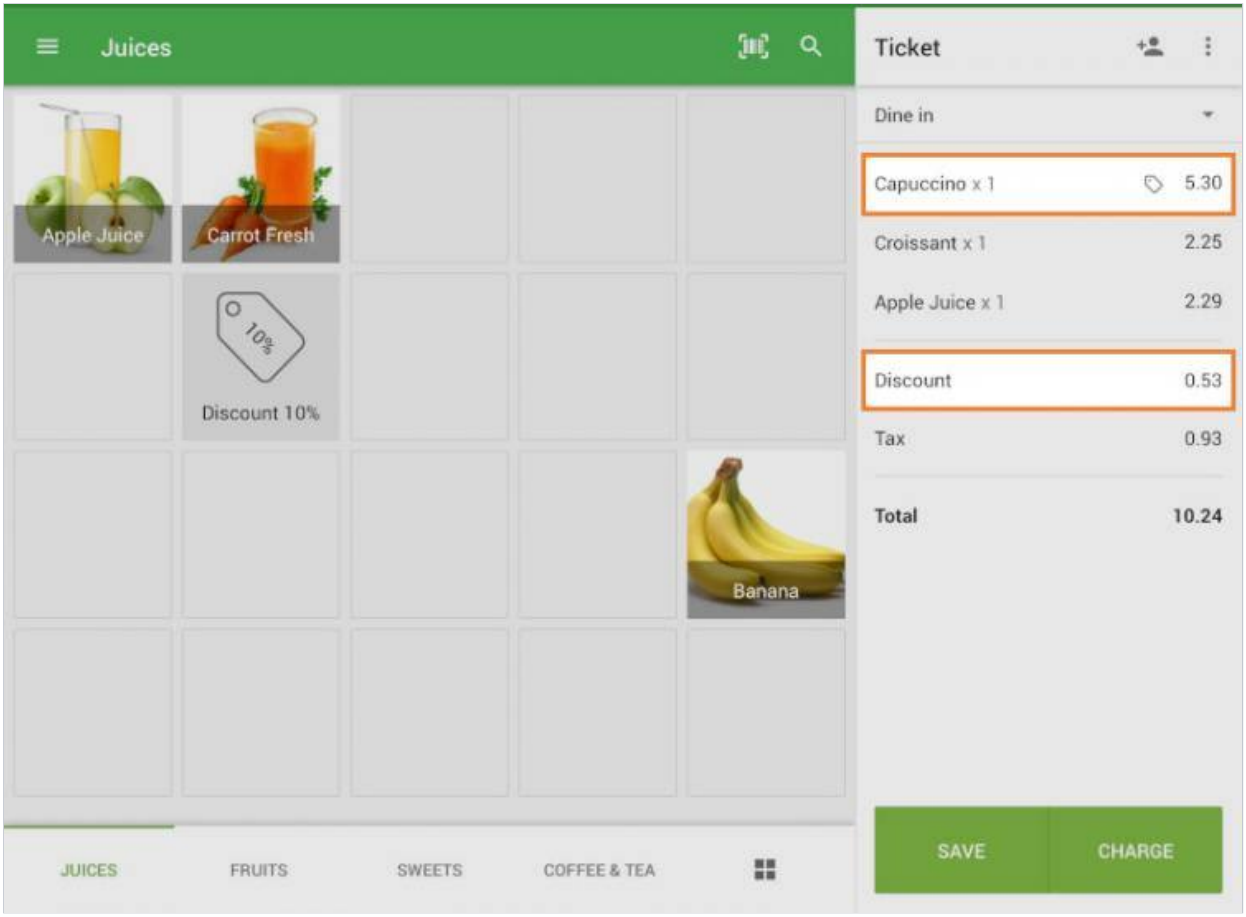
The item editing window will open.



In the **Discounts** section, you'll see a list of available discounts.

Toggle on the desired discount and tap '**Save**'.

The discount will be applied to that item only and shown next to it in the ticket.



Finalizing the Sale

After applying the discount(s), continue the checkout process as usual. The discounted amounts will be reflected in the final total.

Note: Discount Application Order

If multiple types of discounts are used during a sale—such as percentage discounts, amount-based discounts, and customer loyalty points—the system will **automatically apply them in ascending order of value** to ensure accurate calculation.

See also:

How to Create and Configure Discounts

How to Arrange Sale Screen in Loyverse POS

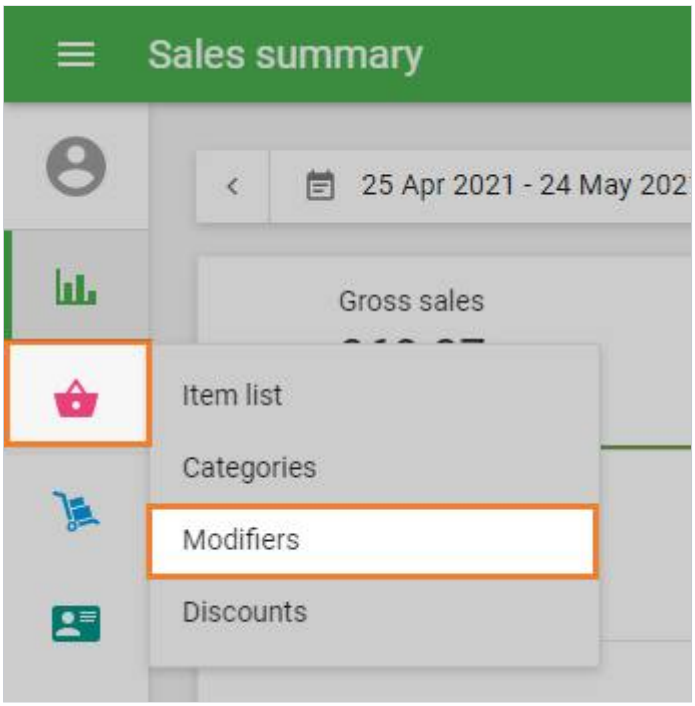
How to Set Up and Apply the Modifiers

Video
https://www.youtube.com/watch?v=c2W8s8-YiUE

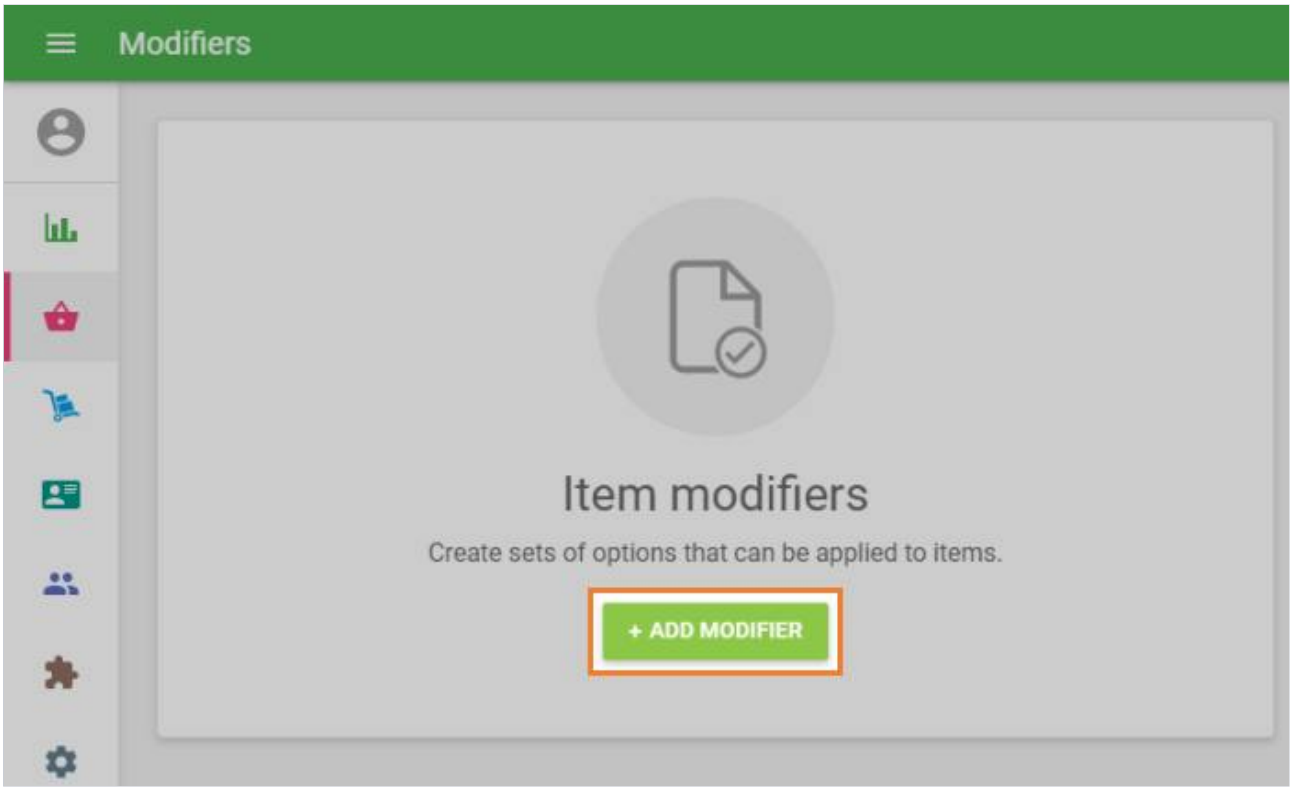
Modifiers are sets of selectable options that can be added to items—such as toppings, fillings, or add-ons. They help streamline the sales process, speed up order taking, and provide insights into customer preferences.

Creating and Setting Up Modifiers in the Back Office

In the **Back Office**, go to the '**Items**' menu and select '**Modifiers**'.

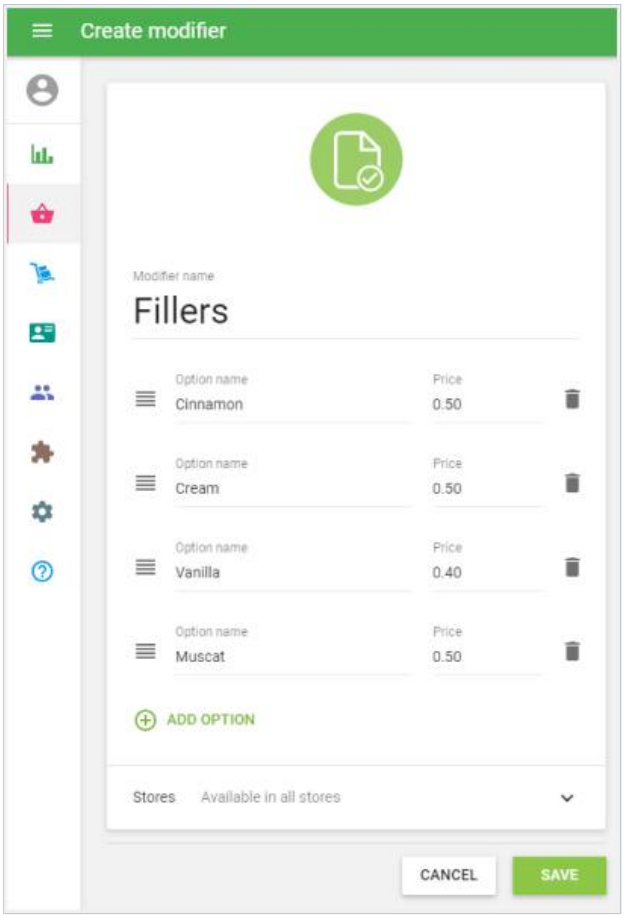


Click '**+ Add modifier**' to create a new one.



In the '**Create modifier**' form:

- Enter the **modifier name**.
- Add **option name**s (e.g., "Extra Cheese", "No Onion") and their **prices**, if applicable.
- Click '**Add option**' to include more choices.

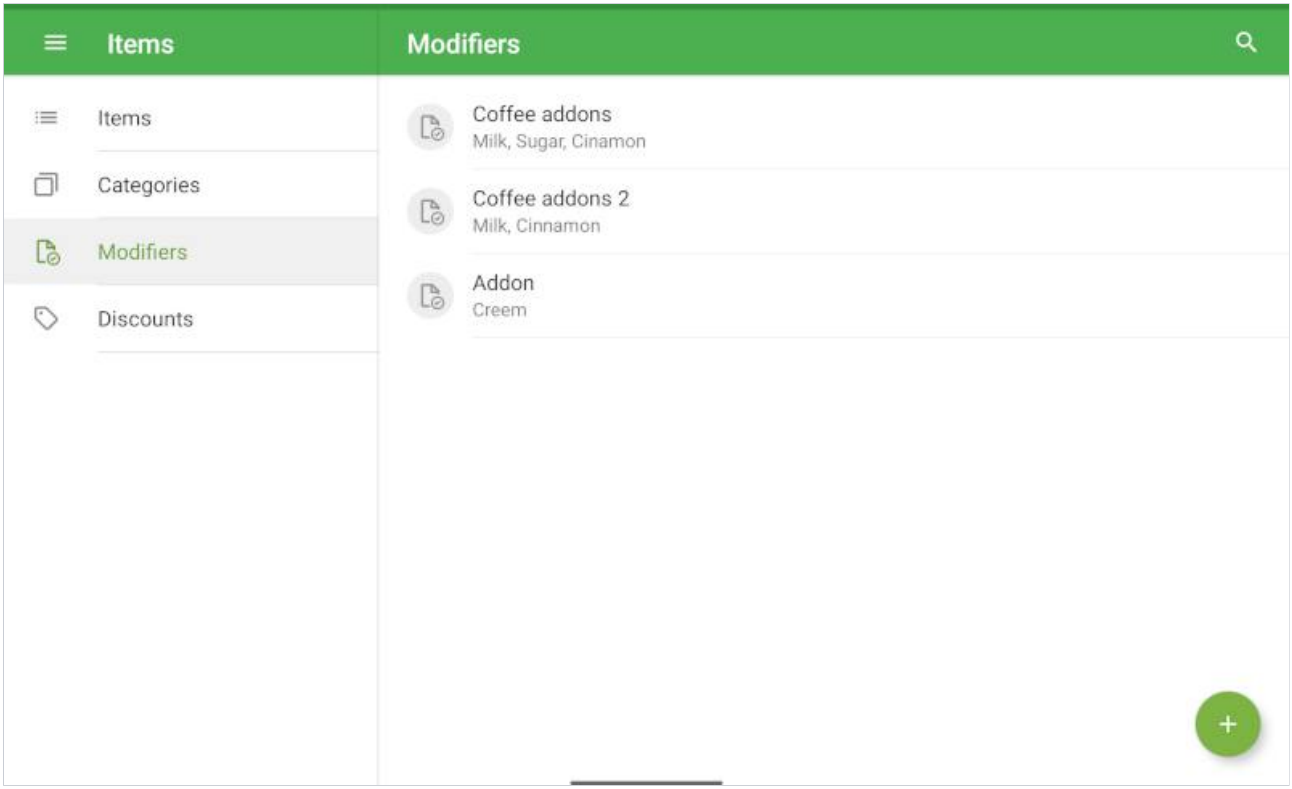


Click '**Save**' to finalize the modifier.

Creating and Editing Modifiers in the Loyverse POS App

You can also create and edit modifiers directly in the Loyverse POS app:

Open the app and go to **Items > Modifiers**.



Tap the **'+'** button in the bottom right corner to add a new modifier.

Enter the **modifier name**, set the **options** and **price**s, and save your changes.

You can also **edit existing modifiers** that were created in the Back Office.

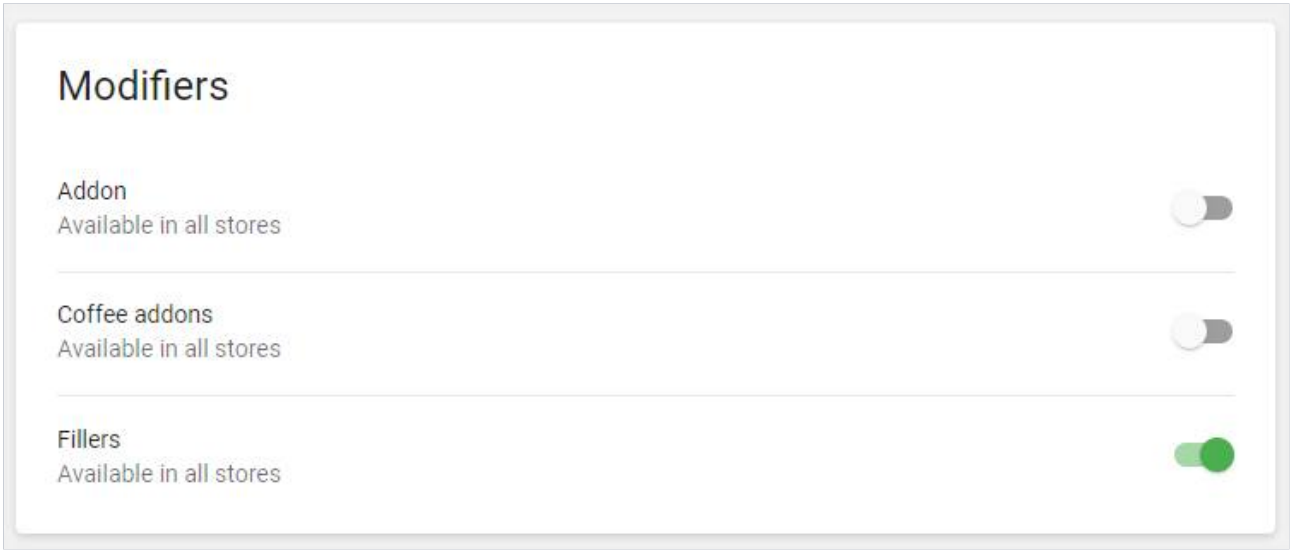
Note: In the POS app, you **cannot change the order** of modifiers as you can in the Back Office.

Assigning Modifiers to Items

In the **Back Office** or **POS,** open the '**Item list**' and select the item you want to edit.

Scroll to the '**Modifiers**' section.

Activate the checkbox for each modifier you want to assign to the item.

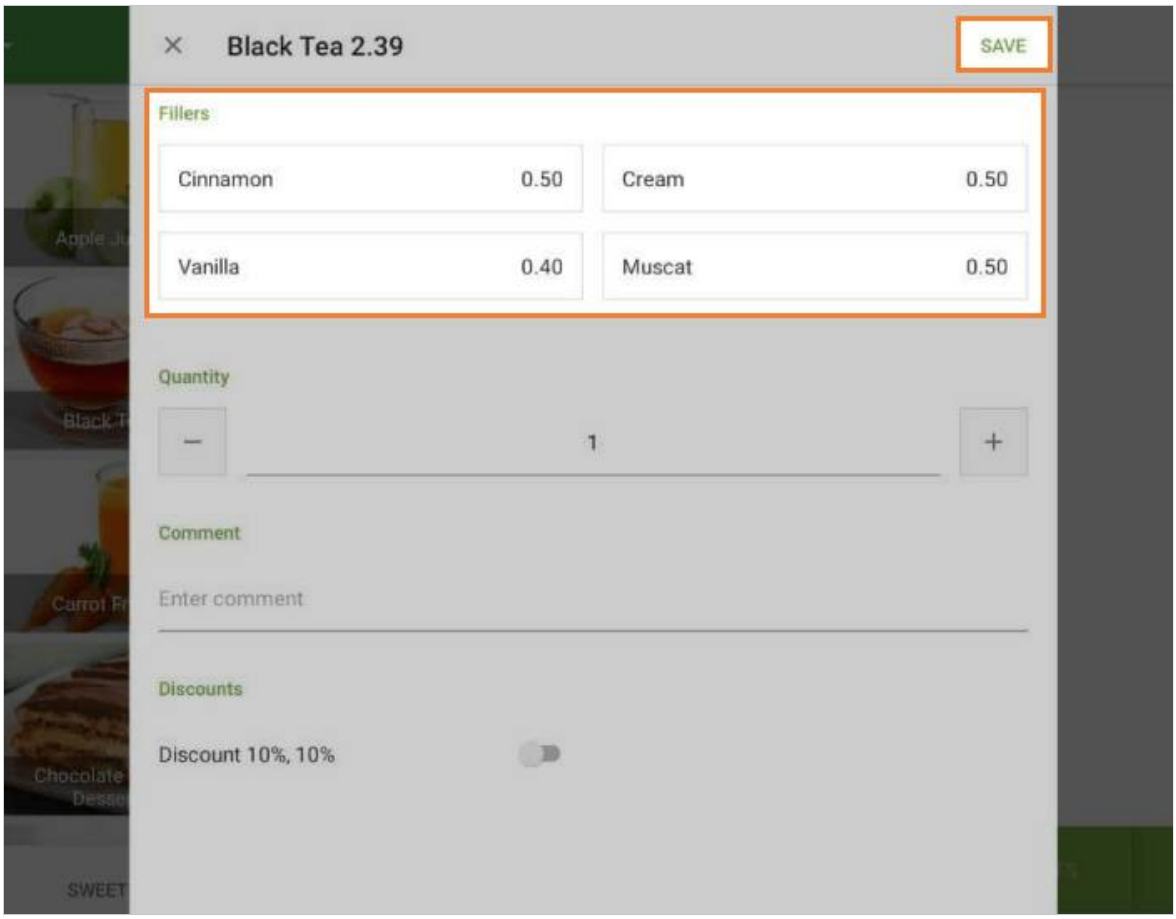


Click **'Save'**.

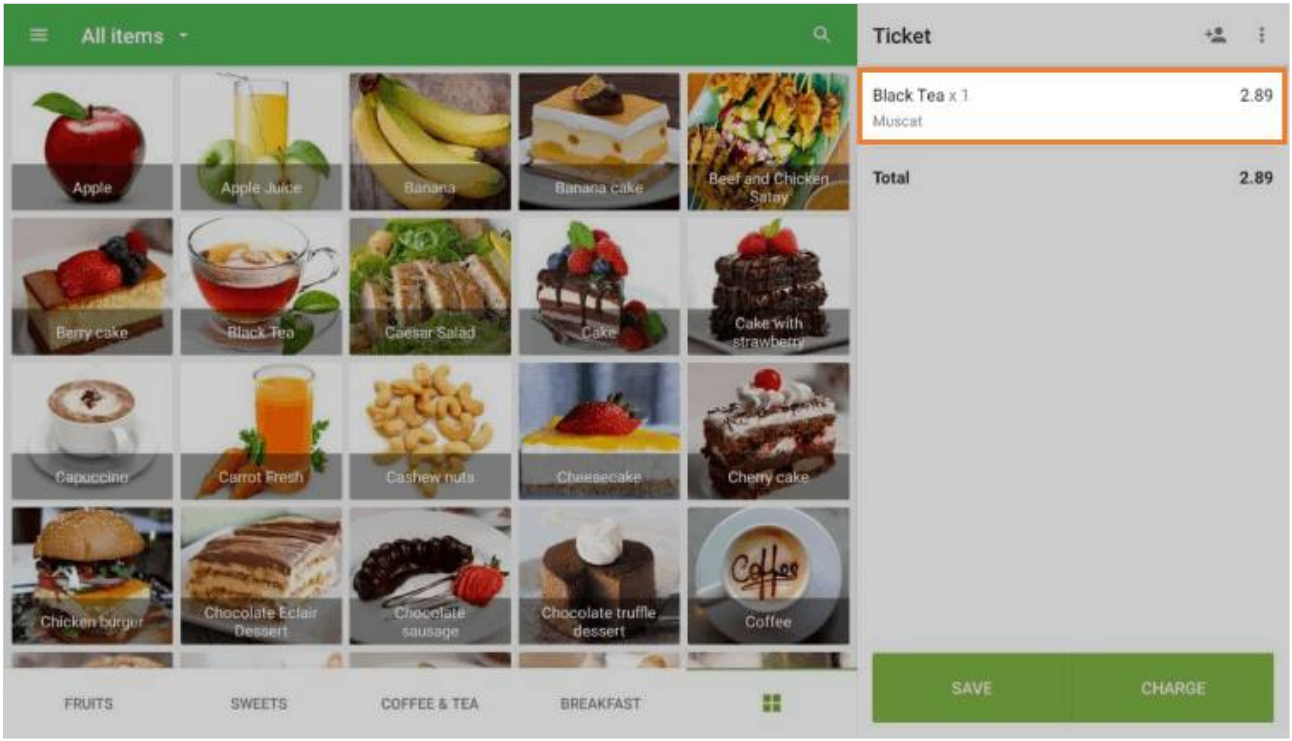
Using Modifiers at the POS

In the Loyverse POS app, tap on an item with assigned modifiers.

A dialog window will appear. Select the desired options and tap '**Save**'.



The item with the selected modifiers will appear in the ticket.

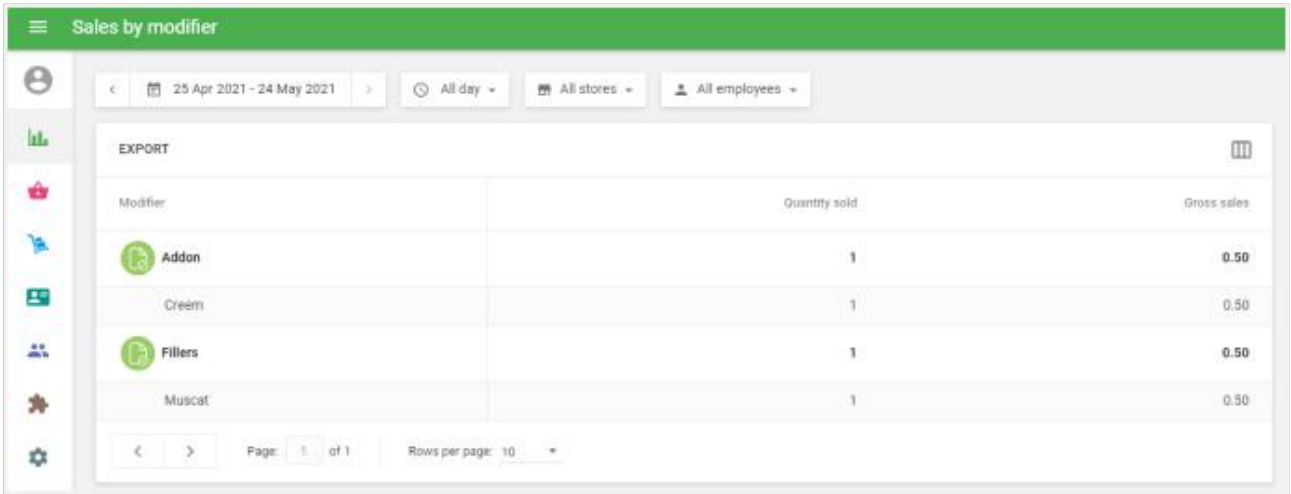


Continue with the checkout process as usual. **Taxes** and **discount**s will be calculated based on the item's base price and the selected modifiers.

Modifier Reporting

Modifiers do **no**t have stock tracking, but you can track their usage in reports.

Go to the **Back Office > Reports > Sales by modifie**r to see how often each option is selected.



Customizing Modifier Order

You can reorder how modifiers appear during a sale on POS:

- In the **Back Office** go to the '**Modifiers**' section.
- Make sure '**All stores**' is selected in the store filter.

- Use the **four-line** icon to drag and rearrange the order of modifier options.

See also:

How to Add Items in the Loyverse Back Office

How to Redeem Customer Points for a Discount

Video
https://www.youtube.com/watch?v=T6MHkk4cZrU

Loyverse POS allows you to reward your loyal customers by letting them redeem accumulated points for discounts during a sale.

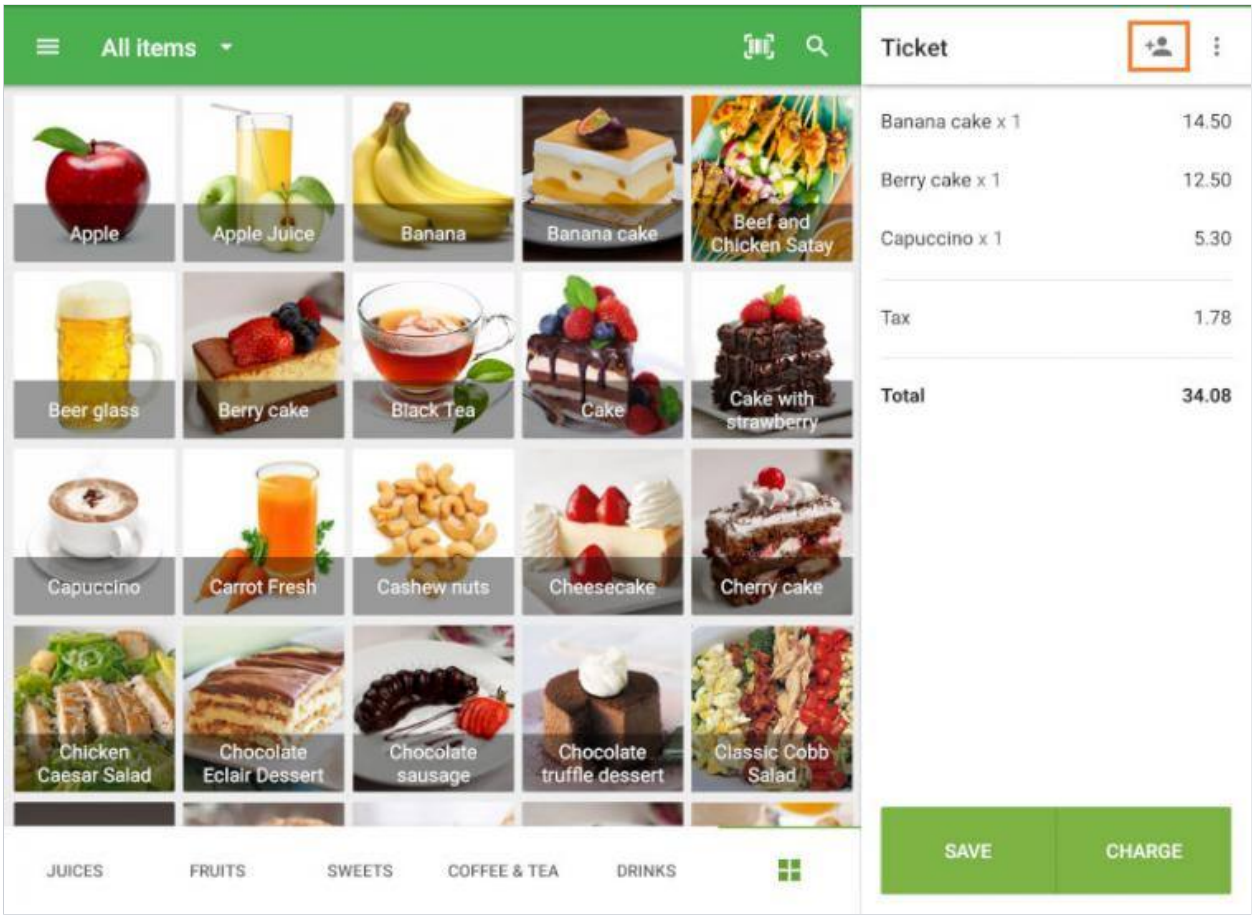
Step-by-Step Instructions

Add Items to the Ticket

Start by adding the desired items to the ticket on the sales screen.

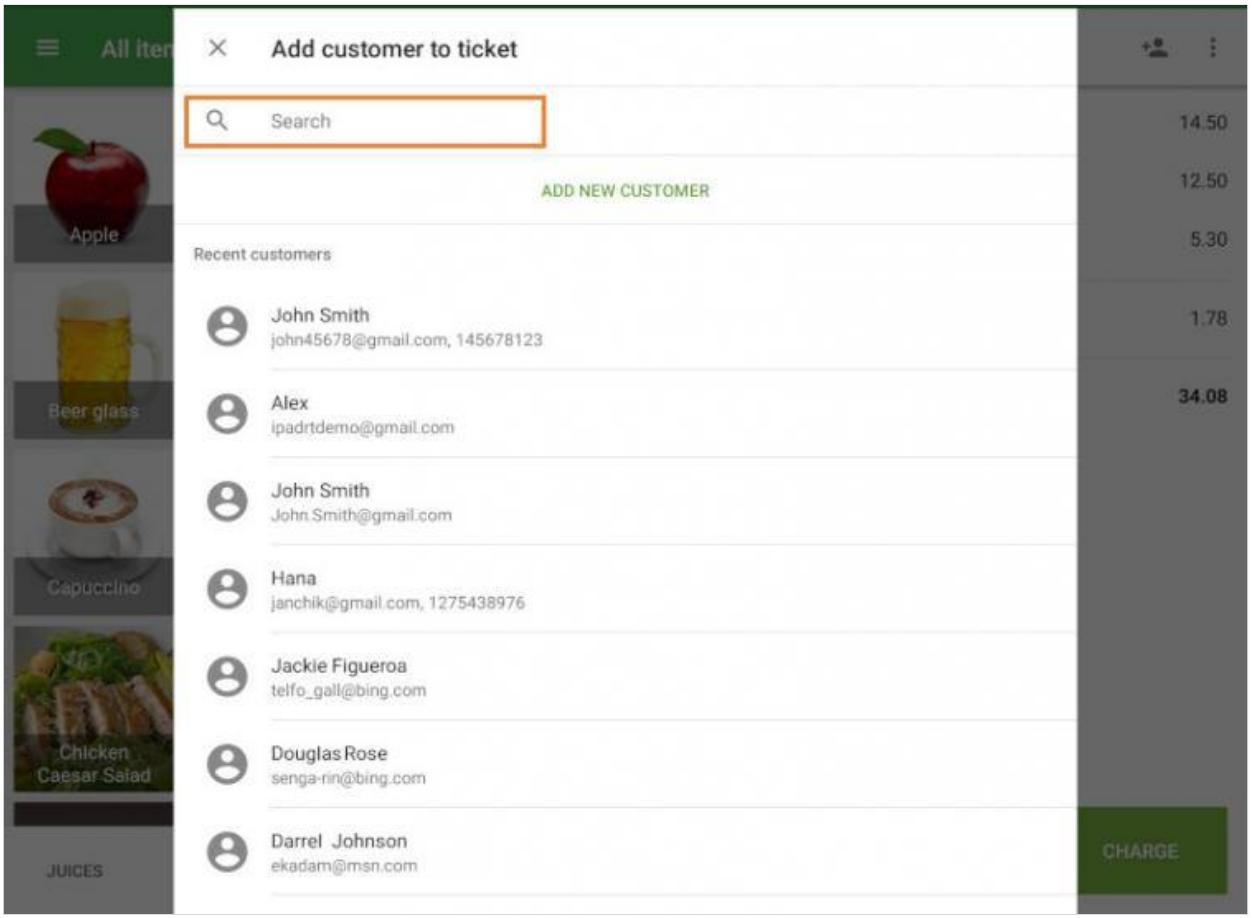
Add a Customer to the Sale

Tap the '**Add client**' icon located at the **top right corner** of the sales screen.



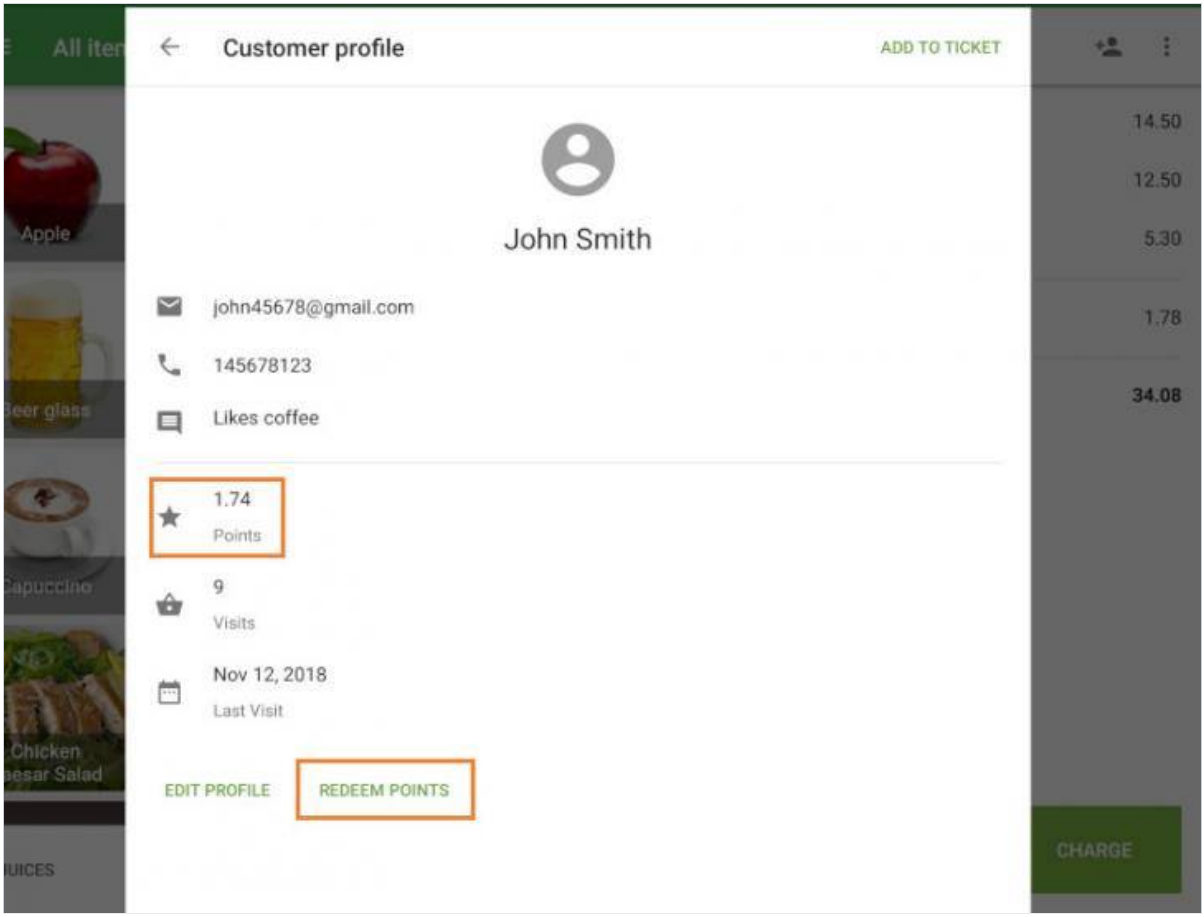
In the pop-up window:

- Choose a customer from the recent list, or
- Use the search field to find the customer by **name**, **email**, or **phone number**.



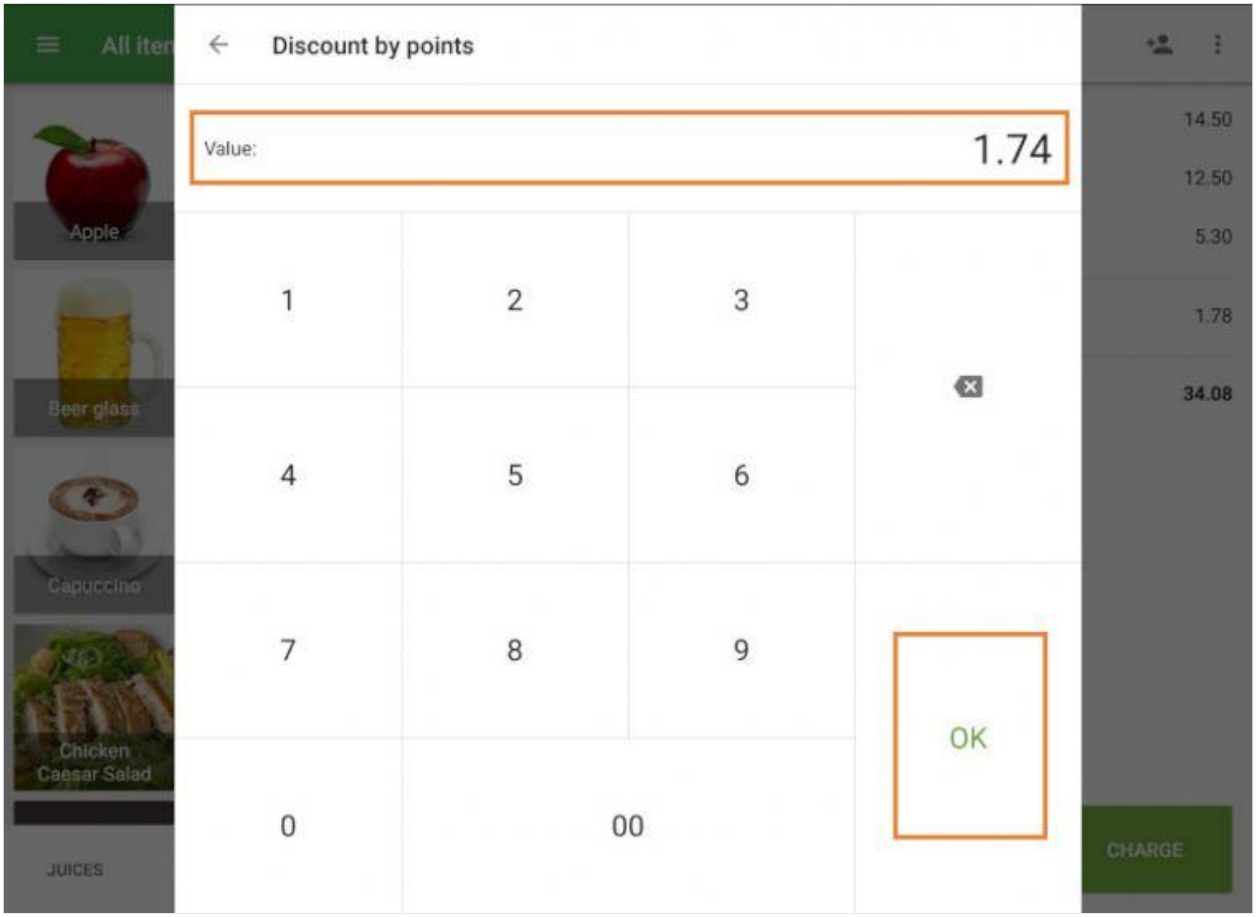
Check Available Points and Redeem

Once a customer is selected, their profile will appear with the **available points** for redemption. Tap '**Redeem points**'.



Enter the Redemption Amount

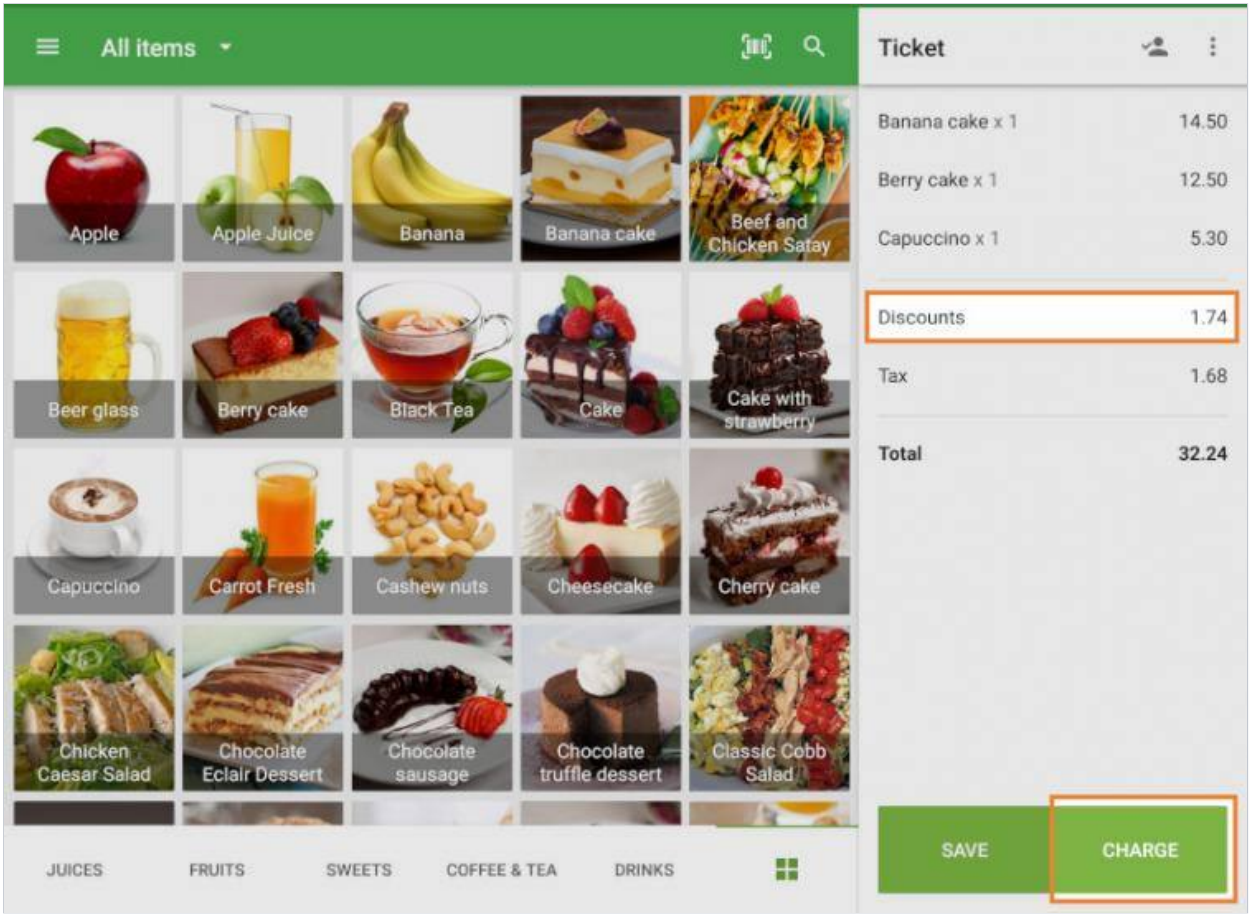
The system will display the **maximum redeemable value**, based on the customer's available points.



- You can choose to redeem the full amount, or
- Enter a lower amount, depending on the customer's preference.
  Tap '**OK**' to apply the points.

Review and Complete the Sale

- The discount from the redeemed points will appear in the ticket under the **Discounts** section.
- Tap '**Charge**' to continue and complete the sale.



See also:

How to Set Up a Customer Loyalty Program

Customer Identification by Number

How to Sign Up a Customer in Loyverse POS

Barcodes

How to Sell Items Using Barcode Scanners

Using a barcode scanner with Loyverse POS speeds up and improves the sales process, especially when dealing with a large number of products.

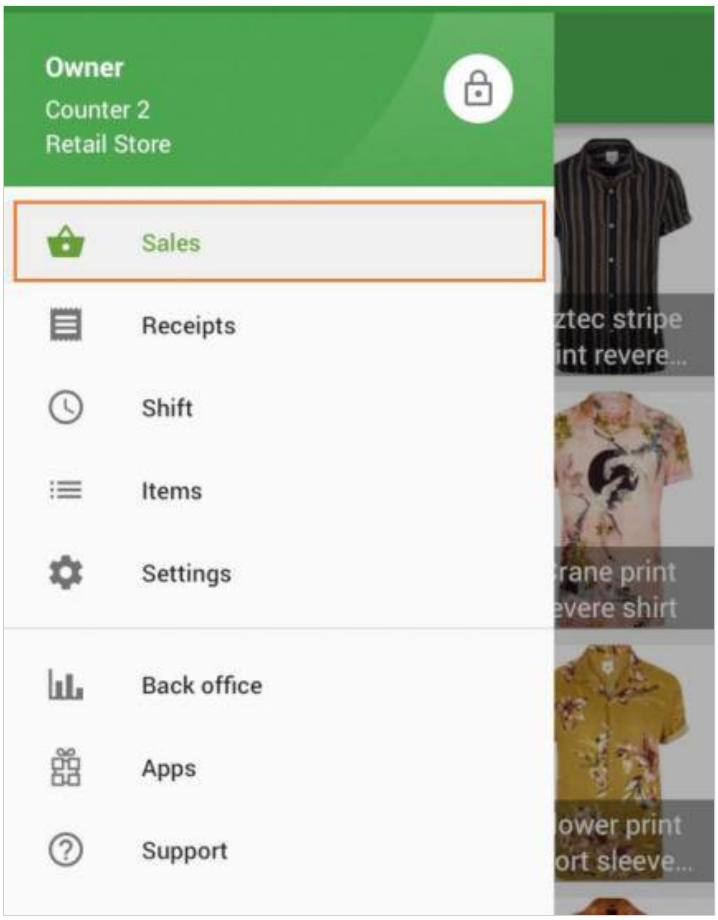
Before You Start

Ensure your barcode scanner is **paired** and working with the device running Loyverse POS (Android, iOS).

Make sure your **items have barcodes** assigned to them in the system.

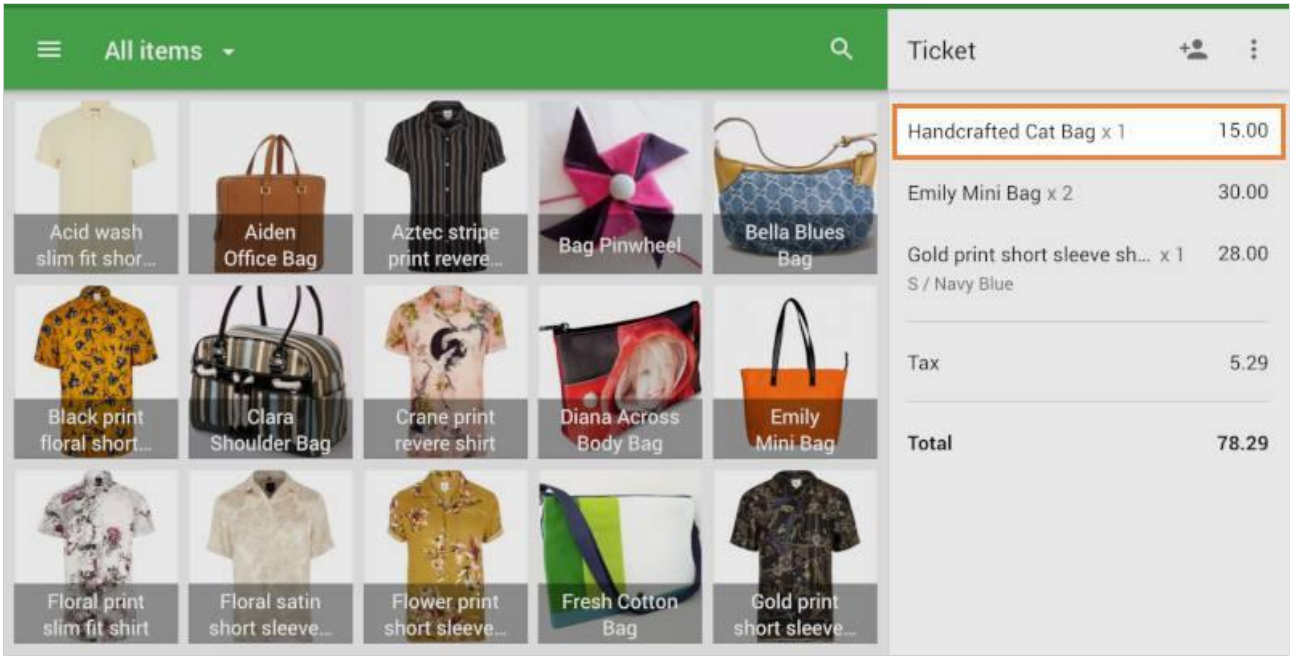
How to Sell with a Barcode Scanner

Launch your Loyverse POS app and go to the **Sales screen** — just like you would for regular sales.

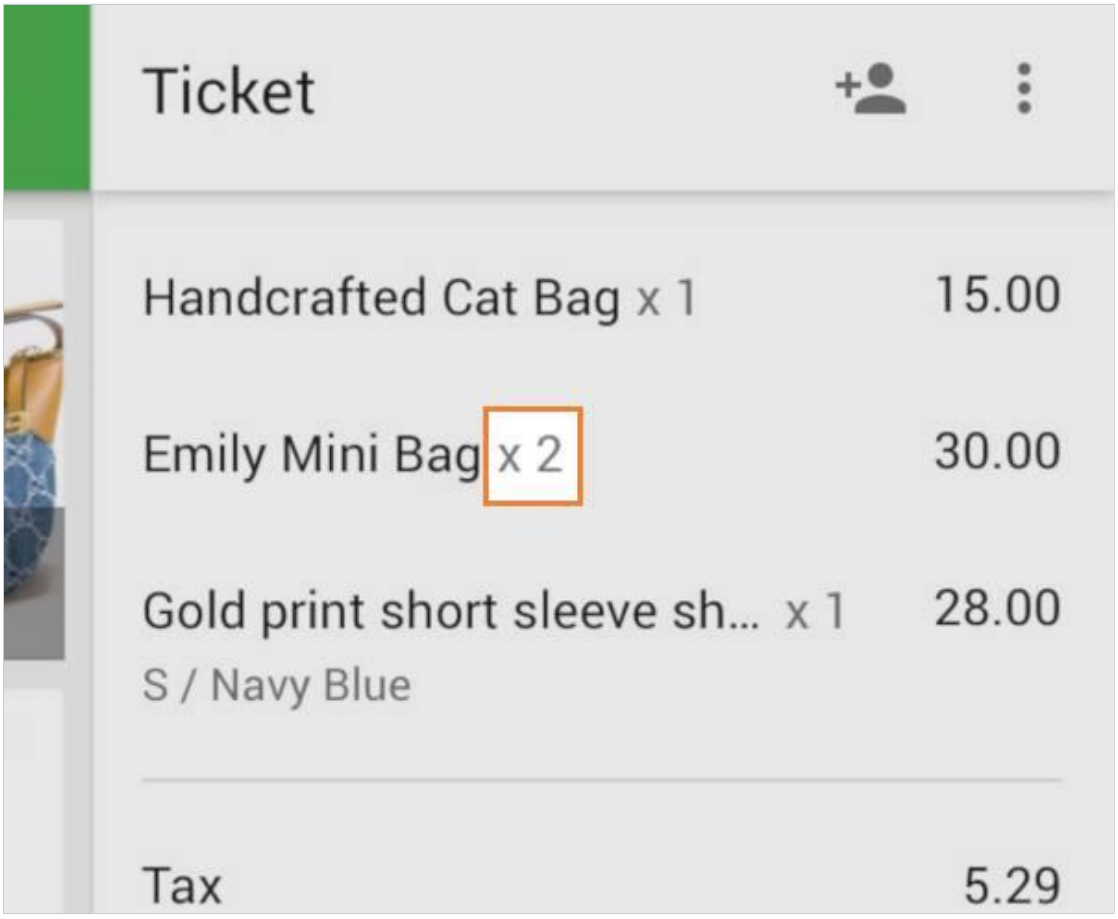


Scan the item's barcode using your scanner.

The item will automatically appear in the ticket.



If you **scan the same barcode again**, the item's quantity will **increase by one** in the ticket.



Using a barcode scanner helps streamline your checkout process, reduce errors, and improve the customer experience.

Troubleshooting Tips for Barcode Scanners

If your scanner doesn't add items to the ticket:

- **Check the connection**
  Make sure the scanner is properly paired with your device (via Bluetooth or cable).
- **Verify scanner settings**
  Your scanner must be set to work in keyboard input mode (HID mode).
  In this mode, scanned barcodes are entered as text.
- **Ensure correct barcode format**
  Make sure the barcode you scan matches the barcode assigned to the item in your Loyverse POS item settings.
- **Test with a text field**
  Open any text input (like a search bar or note app) and scan a barcode. If numbers appear, your scanner is working correctly.
- **Restart the device**
  Sometimes a simple device restart can fix connection or input issues.

See also:

How to Make Sales

How to Add Barcodes to Items

Barcodes Scanning by Built-in Device Camera

Socket 7Qi/7Ci (Bluetooth) Scanner Setup

Barcodes Scanning by Built-in Device Camera

Video
https://www.youtube.com/watch?v=V74HvE_NaUE

Loyverse POS allows you to use your mobile device's built-in camera to scan item barcodes during sales or while managing your item list. This is especially useful when you don't have an external barcode scanner.

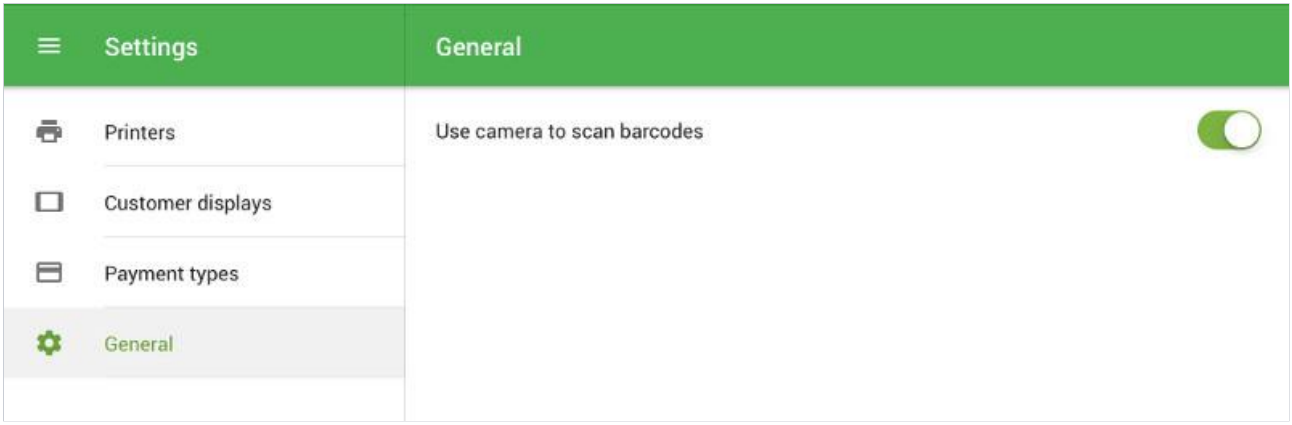
Activating the Camera Scanner

Before you can scan barcodes, make sure the option is enabled:

1. Open **Loyverse POS** on your mobile device.

2. Go to **Settings > General.**

3. Enable the toggle "**Use the camera to scan barcodes**."

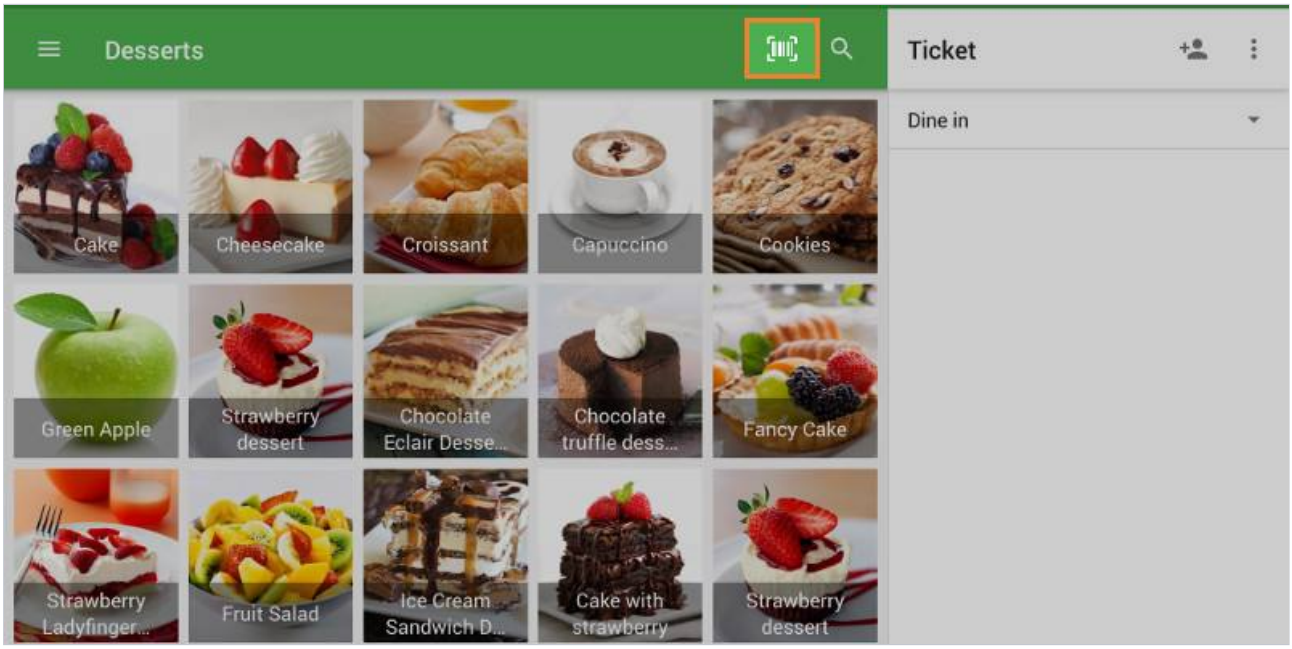


1. Selling Items Using Built-in Camera

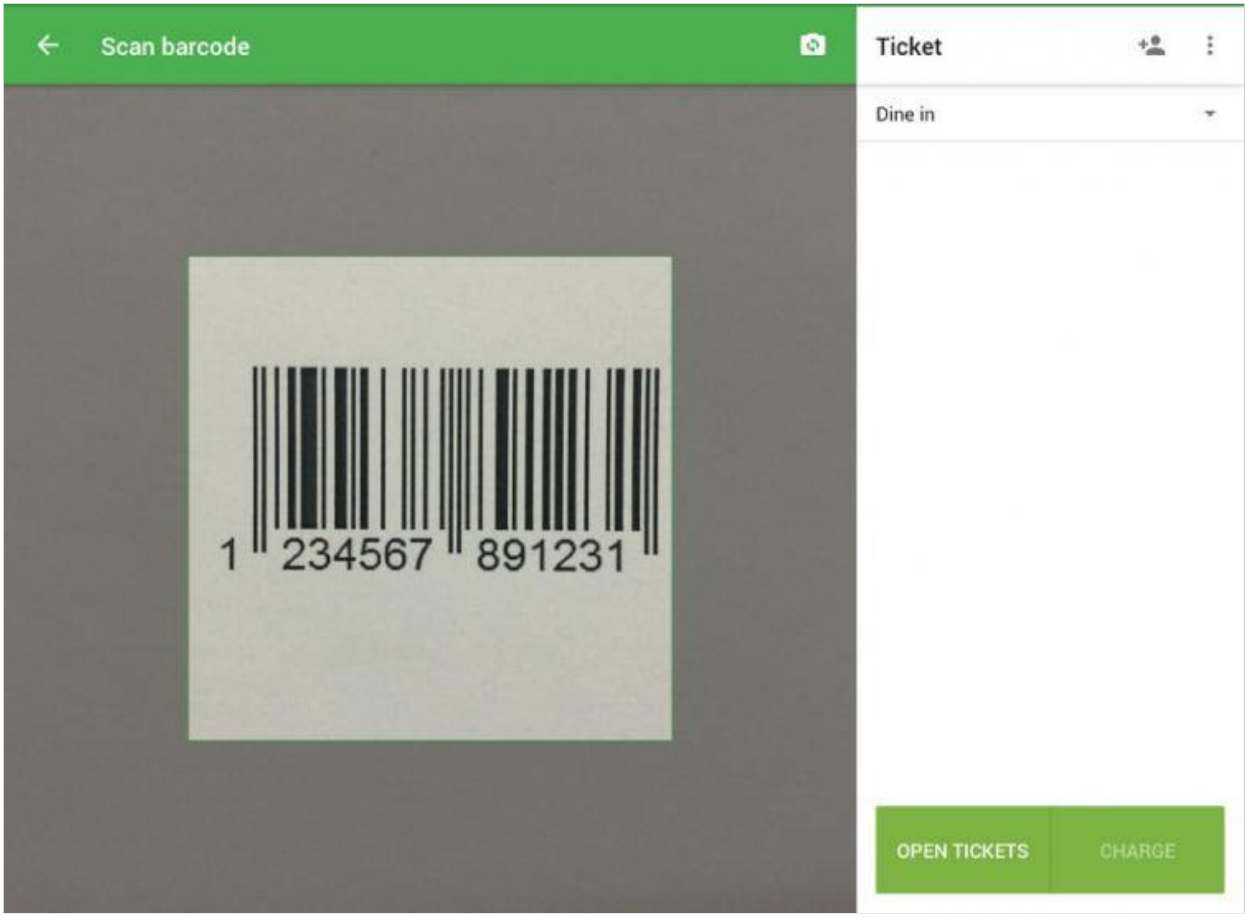
Ensure your items have barcodes assigned to them in the item card.

Launch the **Loyverse POS** app and go to the **Sales screen**.

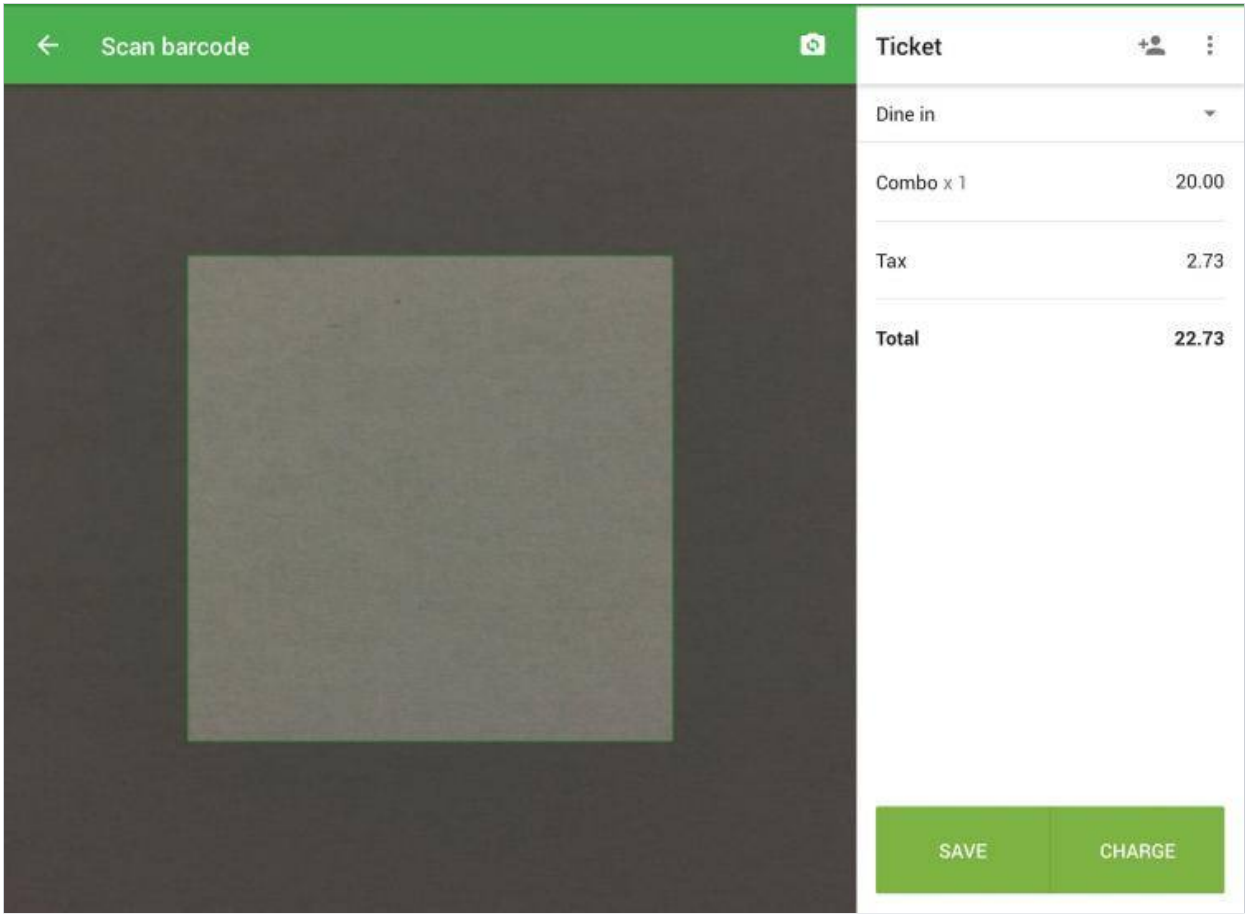
Tap the **camera icon** (barcode scanner button) to activate the camera.



Point the camera at the barcode of the item.



Once scanned, the item will appear in the ticket.



The scanning screen will stay active, allowing you to:

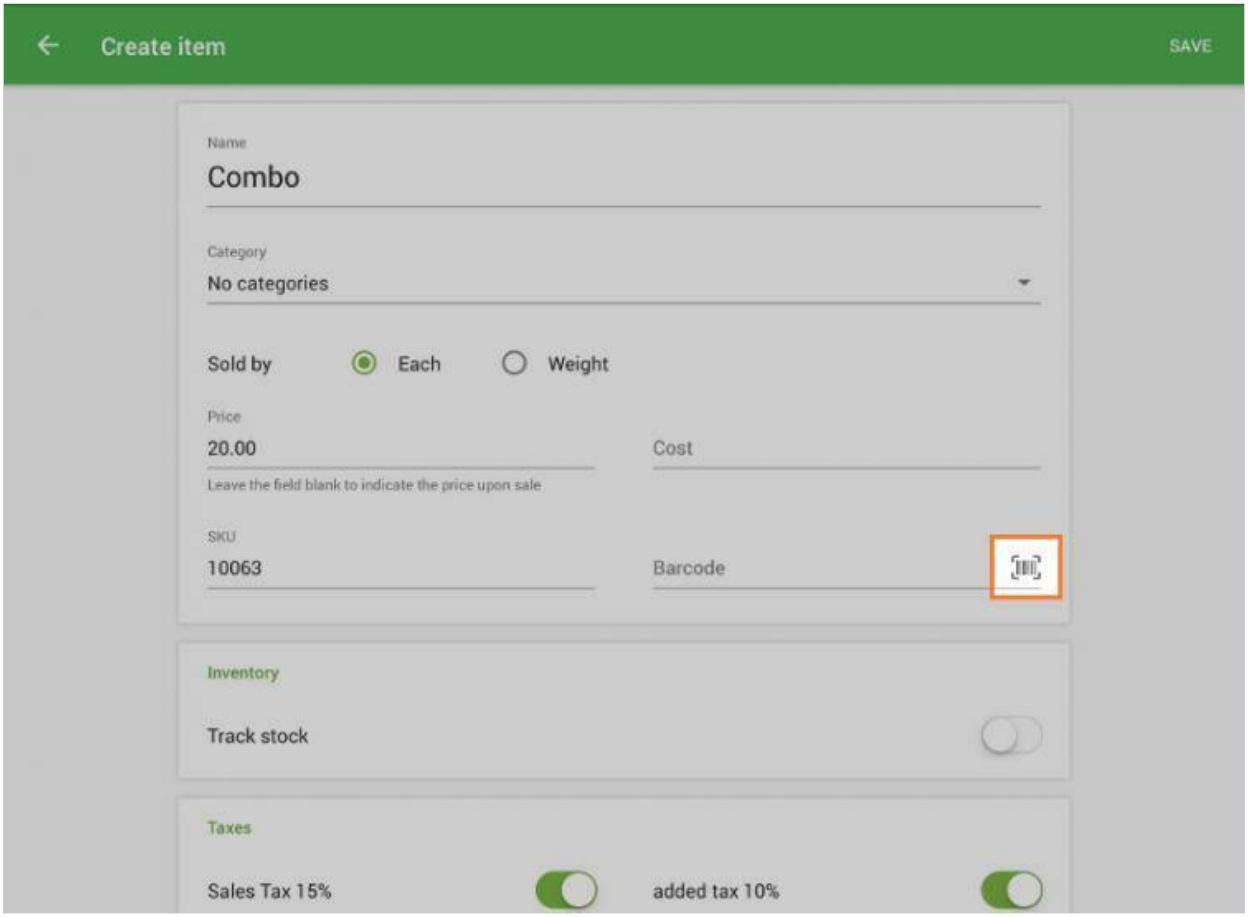
- Scan another barcode
- Edit items in the ticket
- Add a customer
- Redeem customer points
- Save or merge open tickets

2. Adding Barcodes to Items

You can also use the built-in camera to assign or check barcodes in the item list.

From the item's edit screen:

Go to **Items**, open an item, and tap the **scan icon** near the **Barcode** field.



The camera will activate. Point it at the barcode.



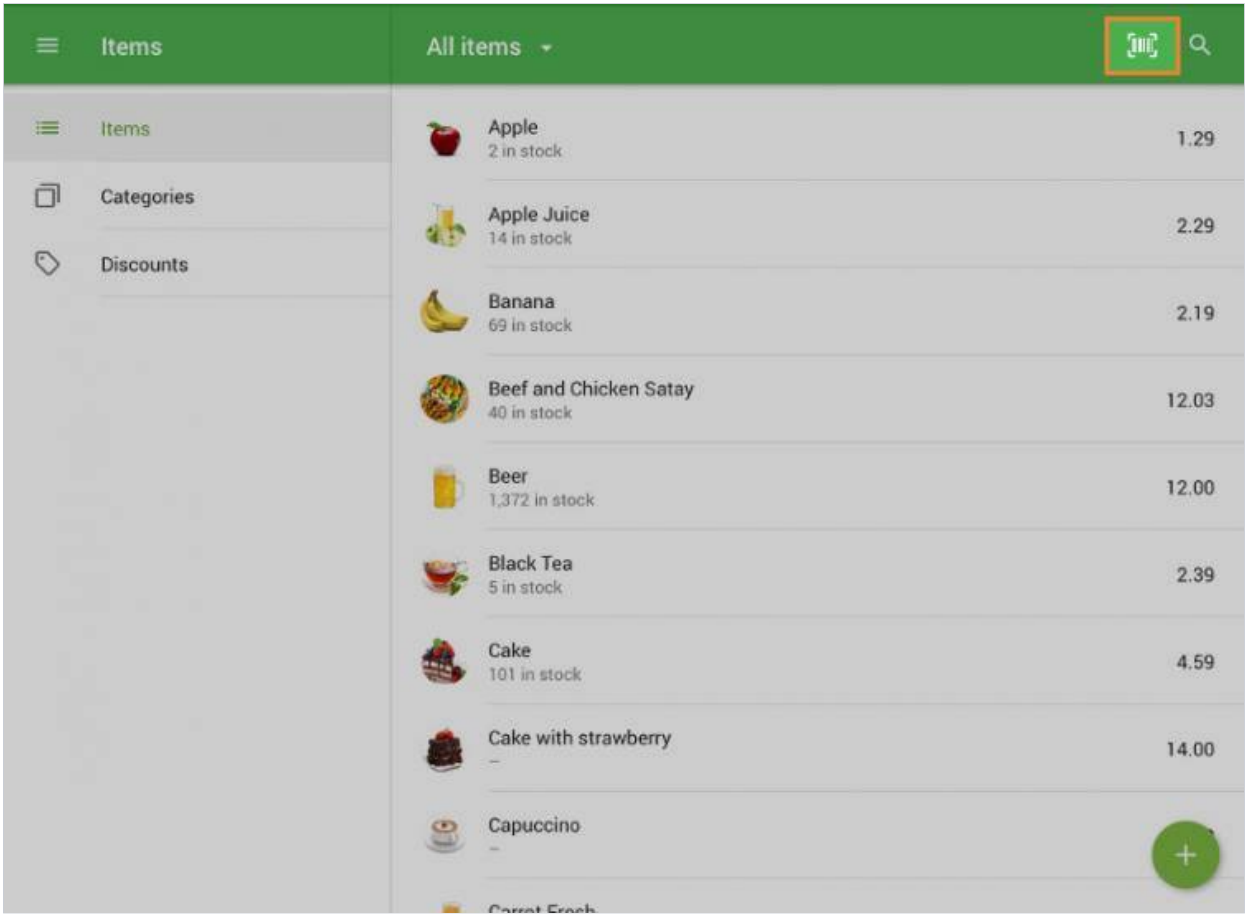
Once scanned, the barcode number will be filled into the Barcode field.



Save the changes.

From the item list:

Tap the **camera icon** in the **Items** menu.



Scan a barcode:

- If the barcode **doesn't match any existing item**, a **new item card** will open with the barcode pre-filled.
- If the barcode **already belongs to an item**, that item will open for editing.

Supported Barcode Formats

Loyverse POS supports the following barcode types using the built-in camera:

- UPC-A
- UPC-E
- EAN-13
- EAN-8
- Code 39
- Code 93
- Code 128
- QR codes

See also:

[How to Add Barcodes to Items]

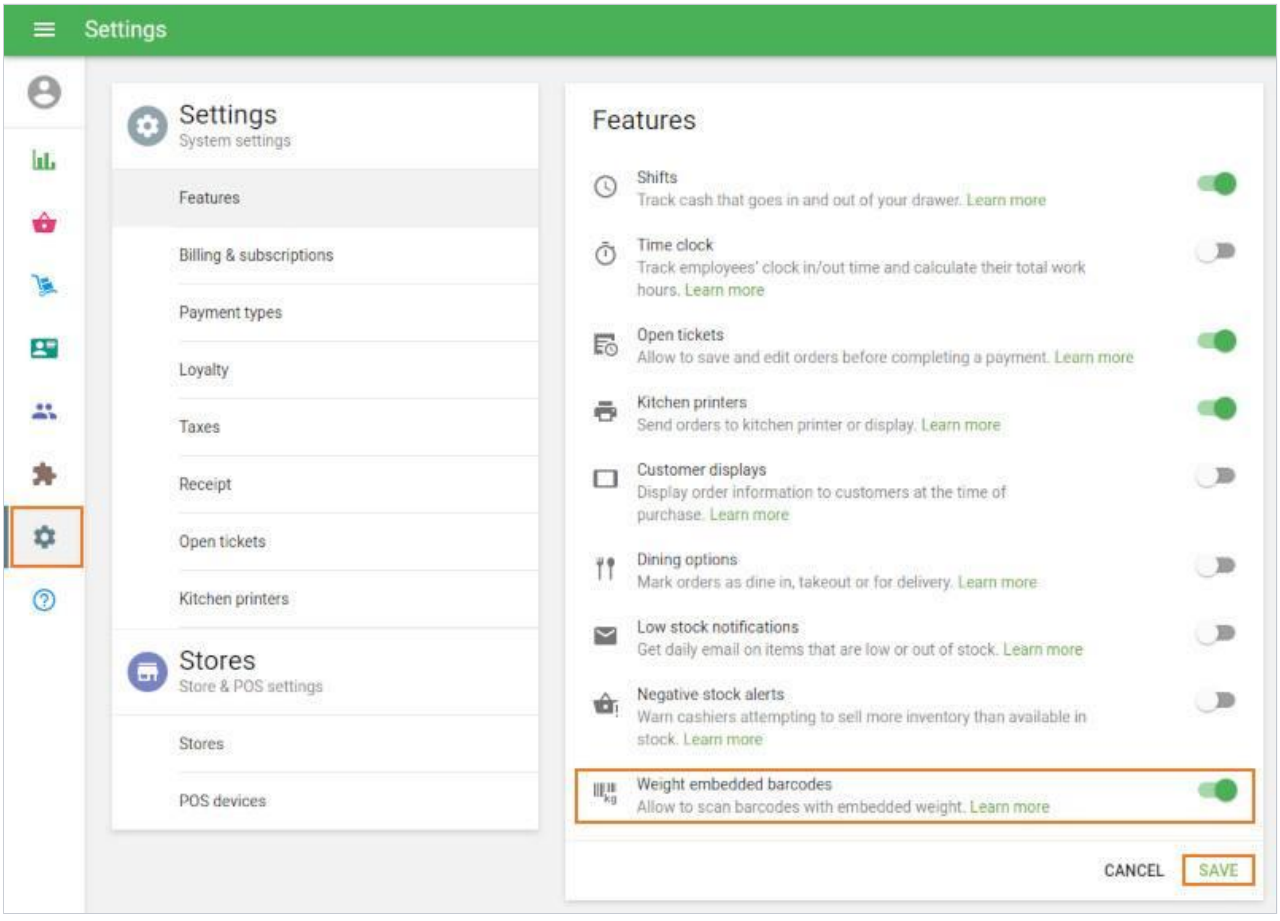
[Hardware for Loyverse POS]

How to Scan Barcodes with Embedded Weight

Video
https://www.youtube.com/watch?v=9IxBzxINZFg

The option allows you to scan barcodes containing the item SKU and its weight. When scanning such a barcode, the item is automatically added to the receipt with the indicated weight (quantity). The system allows the use of weighted barcodes in the following formats: EAN 13 and UPC-A.

To use this feature, log in to your Back Office, click on the Settings icon on the left menu bar to go to the System settings.
In the 'Features' section, switch on the parameter for 'Barcodes with embedded weight'. Click the 'Save' button.



At your POS, you can sell items by scan barcodes with embedded weight using the device camera or barcode scanner.

Barcodes with embedded weight format should follow the pattern:
YYCCCCCWWWWWX
YY - prefix, by which the system determines that it is a weight embedded barcode. It must be “20” or “02” for EAN 13 and “2” for UPC-A.
CCCCC - item SKU (note that it has to be programmed as five digits, for example "10010" or "00010").
WWWWW - weight (quantity) of item in grams. For example "01750" = 1.750kg
X - barcode checksum

Samples of barcodes with embedded weight

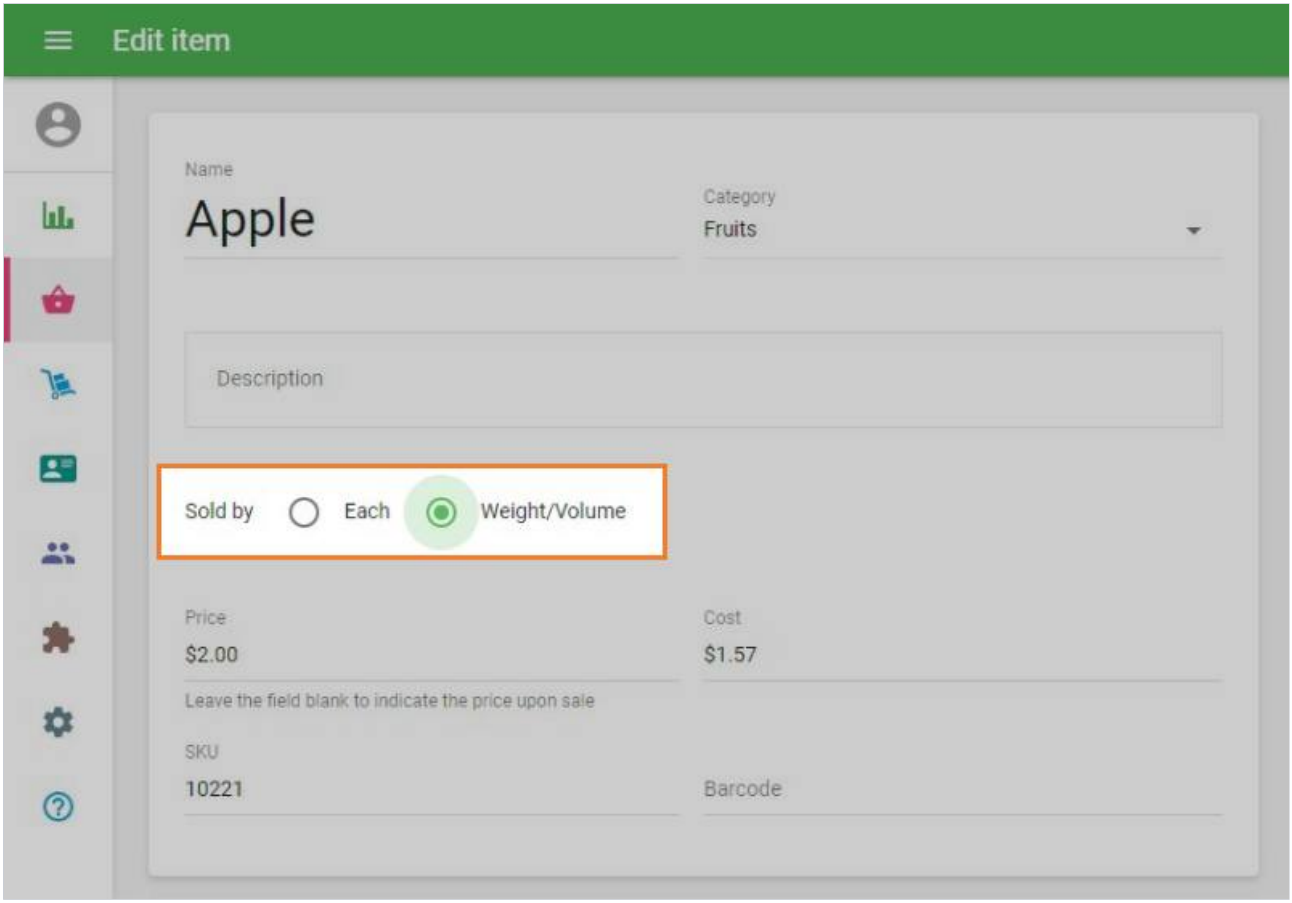
EAN 13



UPC-A



Note: Items should have the 'sold by weight' option on. Otherwise, you will receive an error message when scanning barcodes with embedded weight.



See also:

[How to Sell Items Using Barcode Scanners]

[How to Sell Items by Weight]

Payments & Rounding

How to Accept Credit Card Payments in Loyverse POS

Video
https://www.youtube.com/watch?v=wStCAa6AwRM

Loyverse POS allows you to accept credit and debit card payments through **integrated payment systems** or **non-integrated terminals**. Both methods are easy to use and help you keep track of sales efficiently.

Using Non-Integrated Card Terminals

You can use any standalone card terminal with Loyverse POS without direct integration.

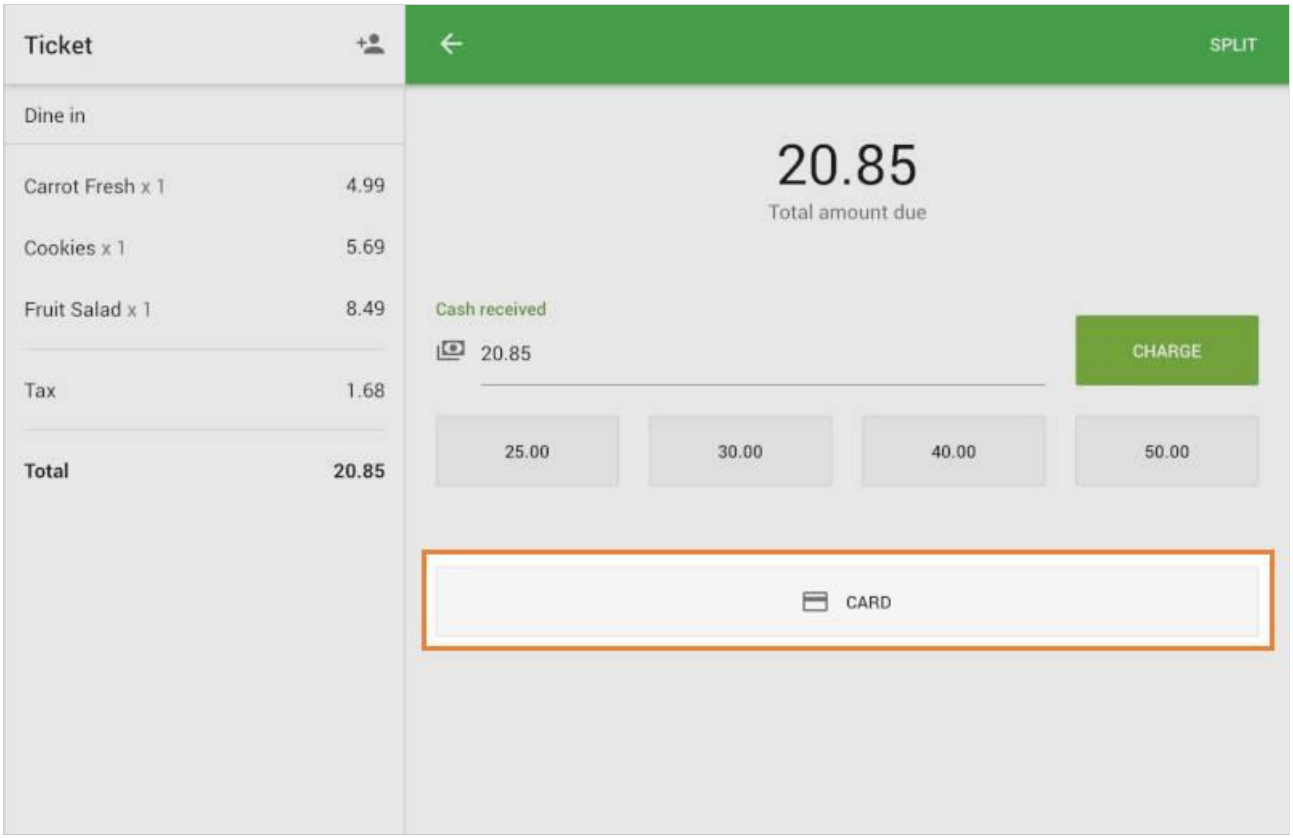
Steps:

1. Process the Payment on the Terminal:

At the final stage of the sale, manually enter the total amount into your card terminal and process the payment.

2. Record the Payment in Loyverse POS:

After the payment is approved, return to Loyverse POS and tap the '**Card**' button to record the transaction.



Note: Loyverse POS does not communicate with the terminal directly in this setup. The amount must be entered manually, and the systems operate independently.

The receipt from Loyverse POS will display the **payment method** and **card** label.



Using Integrated Card Payment Systems

Loyverse POS supports direct integration with several card processing systems, allowing for a seamless checkout experience.

Benefits of Integration:

- **Automatic Amount Transfer:** The total sale amount is automatically sent from Loyverse POS to the card terminal, eliminating manual entry.
- **Faster Checkout:** Reduces transaction time and minimizes errors.

Currently Supported Integrated Payment Systems:

- **SumUp**: Available in over 30 countries across Europe, North and South America, and Oceania.
- **Paypal Zettle:** Available in various European countries, the USA, and Mexico.
- **Teya:** Available in the United Kingdom, the Czech Republic, Iceland, Italy, and Spain.
- **Tyro:** Available in Australia.
- **Smartpay:** Available in Australia and New Zealand.

- **Yoco:** Available in South Africa (iOS only).
- **STORES** Payment, **PAYGATE**, **Softbank**, **CpayPro**: Available in Japan (iOS only).
- **KICC**, **NICE**: Available in Korea (iOS only).
- **Ezetap**: Currently in early access; available upon request for businesses based in India (iOS only).

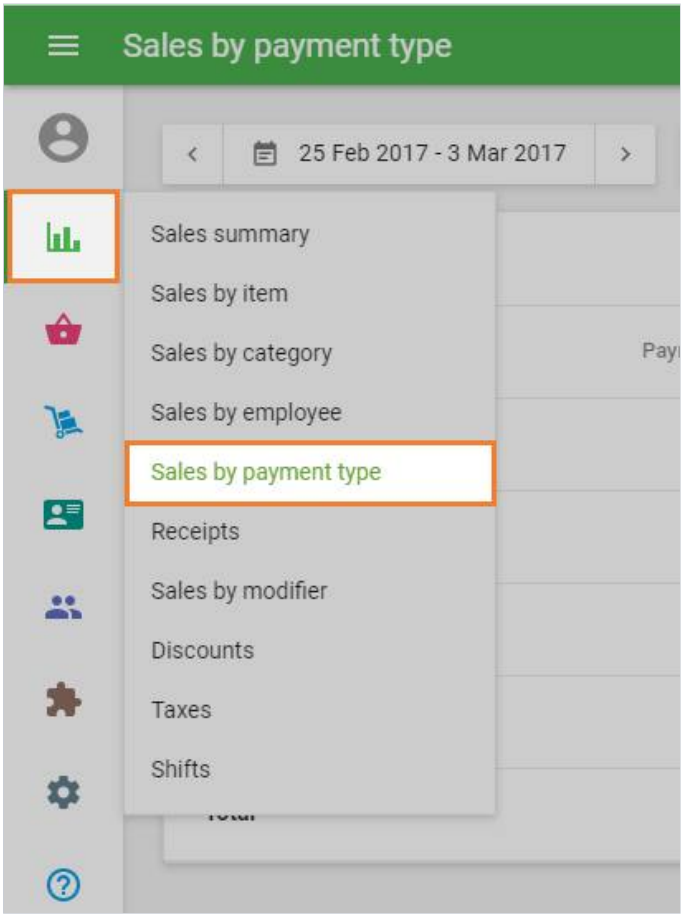
Note: The availability of integrated payment systems varies by country and device (iOS or Android). Please refer to the official list for detailed information.

For the **full list of supported card processors and their country availability**, please visit: https://loyverse.com/payment-systems

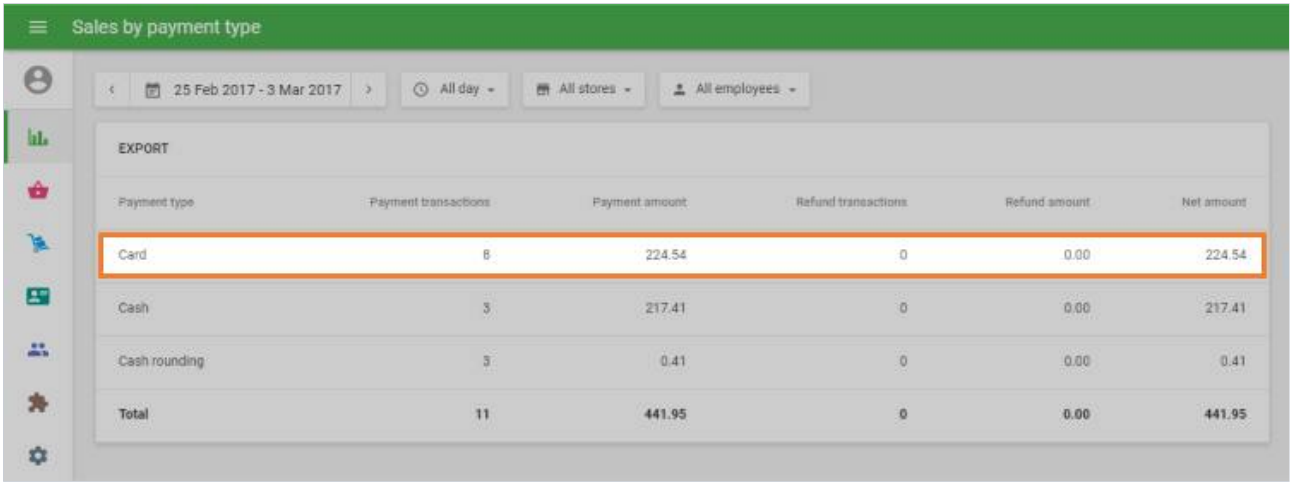
Reporting on Card Sales

Loyverse POS automatically tracks card payments for reporting purposes.

In the **Back Office**, go to **Reports > Sales by Payment Type**.



There, you'll find a breakdown of **sales by credit card**, along with other payment methods.



This helps you analyze payment trends and reconcile your card transactions with your terminal or payment provider.

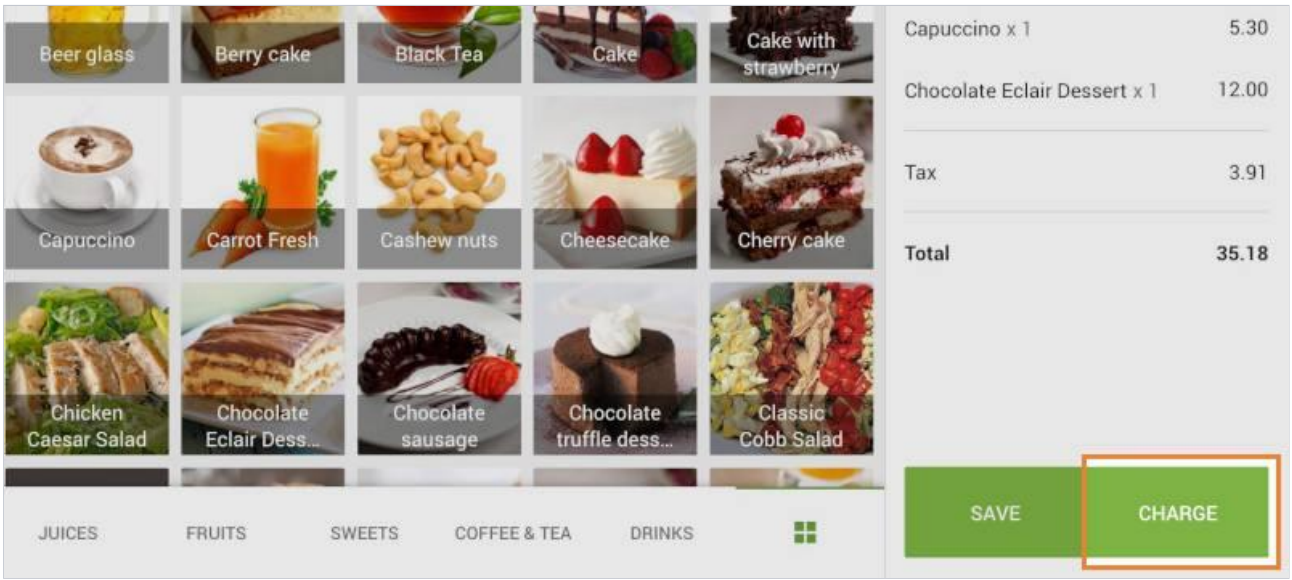
How to Split Payment with Loyverse POS

Video
https://www.youtube.com/watch?v=PXpRcQd8Xm0

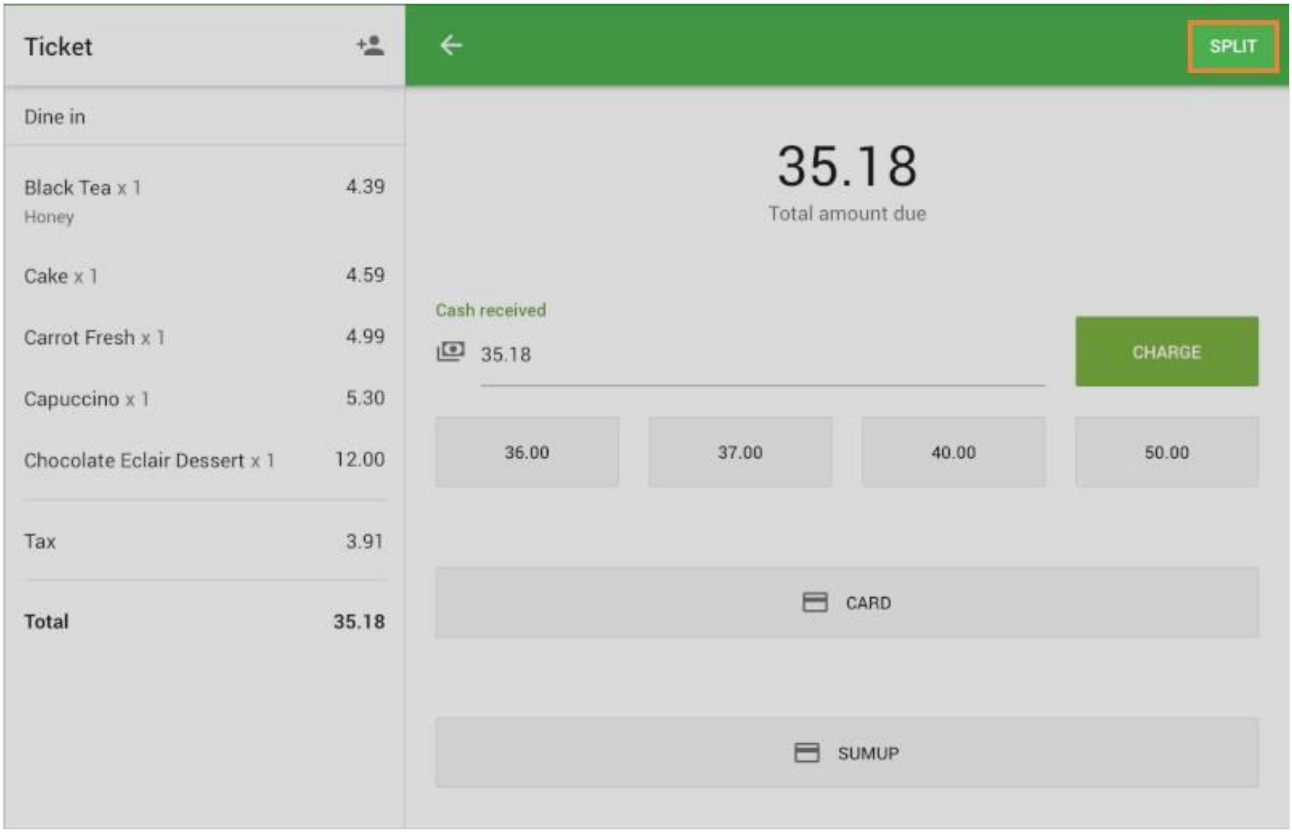
Sometimes, customers ask to split the total amount of a ticket into several partial payments. With Loyverse POS, you can easily do this — even using different payment types for each portion.

Steps to Split a Payment

Add items to the ticket and tap the '**Charg**e' button.



In the payment screen, tap the '**Split**' button.



Use the '**+**' or '**–**' buttons to set the number of payment portions.

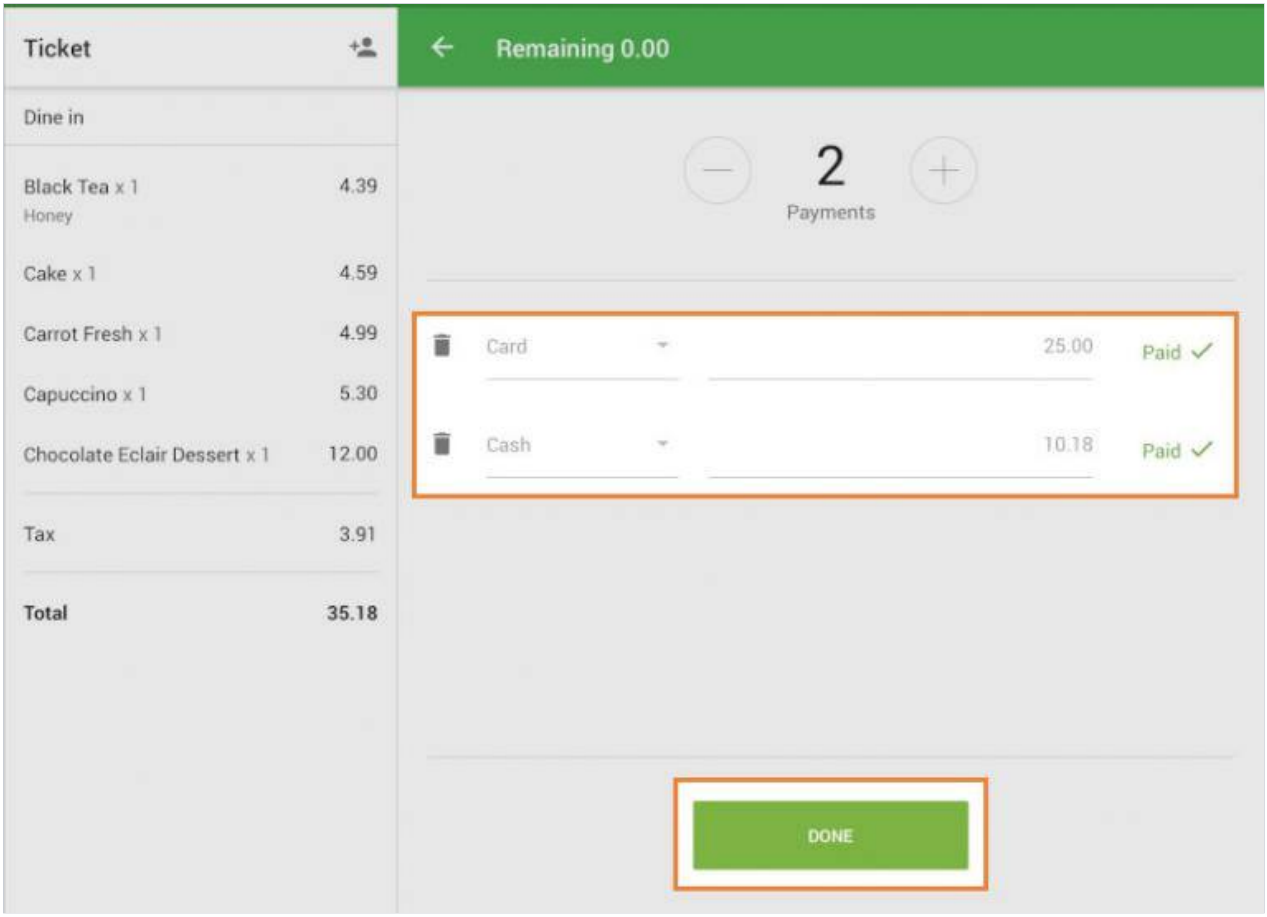
By default, the total amount will be divided equally among the selected number of payments.

For each part:

- Select a **payment type** (e.g., Cash, Card, etc.).
- If needed, **adjust the amount** manually for any portion by tapping on the amount and entering a custom value.

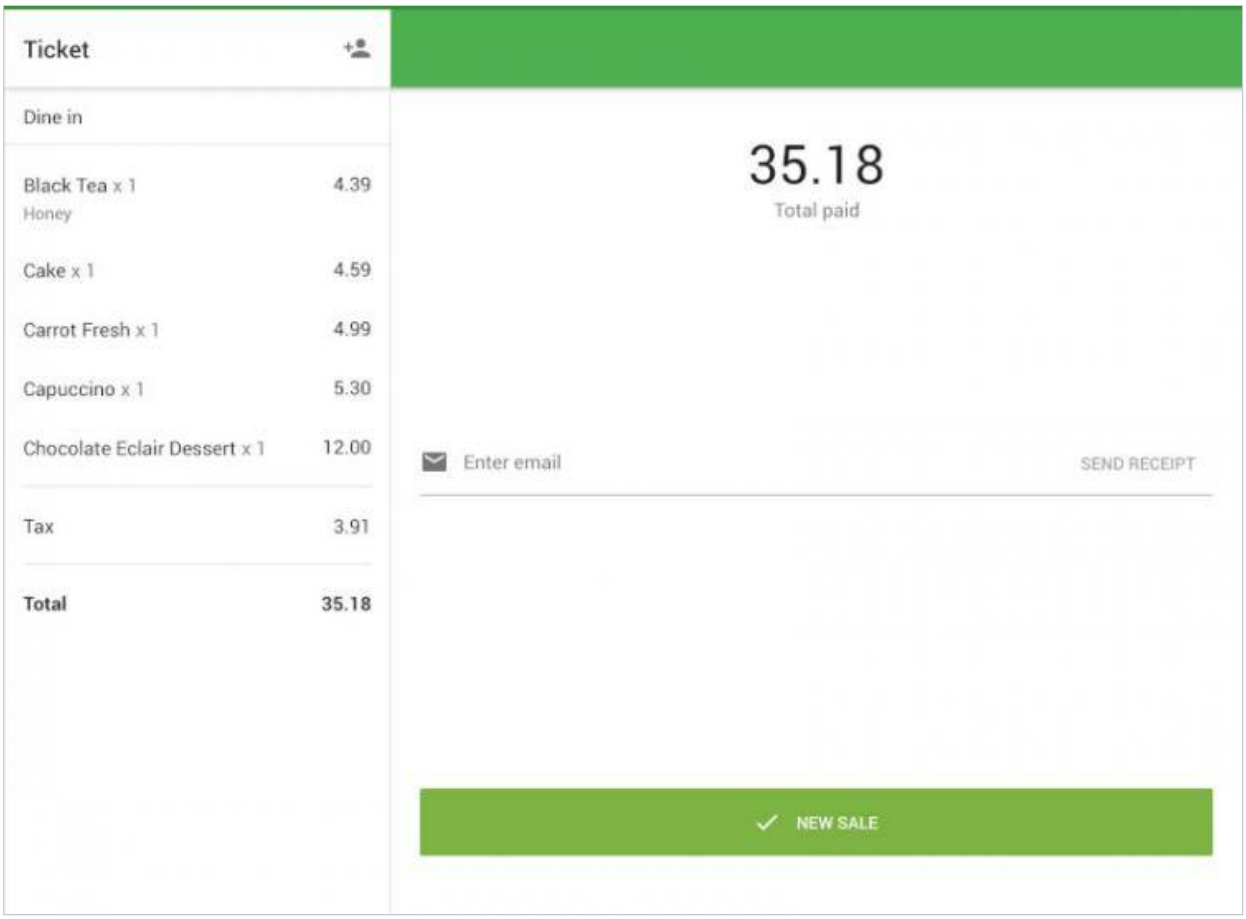
Tap the '**Charge**' button to process each partial payment. You can print a separate receipt for each individual payment.

Once all parts have been paid, each line will be marked '**Paid**'.



Tap **'Done'** to complete the transaction.

What Happens Next



Tap '**New Sal**e' to finalize the sale, return to the sales screen, and start the next transaction. **The system records the sale as a single receipt** with multiple payment types.

See also:

How to Make Sales

Configuring Payment Types in Loyverse POS

How to Work with Cash Rounding

Video
https://www.youtube.com/watch?v=KR7nSAUfPI0

Cash rounding adjusts the total amount payable in **cash transactions** to the nearest rounding interval based on a selected rounding rule. It does **not affect** transactions made via card, mobile payments, or other non-cash methods.

Cash rounding is useful in:

- Countries where small coins have been removed from circulation.
- Situations where merchants want to minimize handling of small change.
- Cases where rounding is legally or optionally permitted.

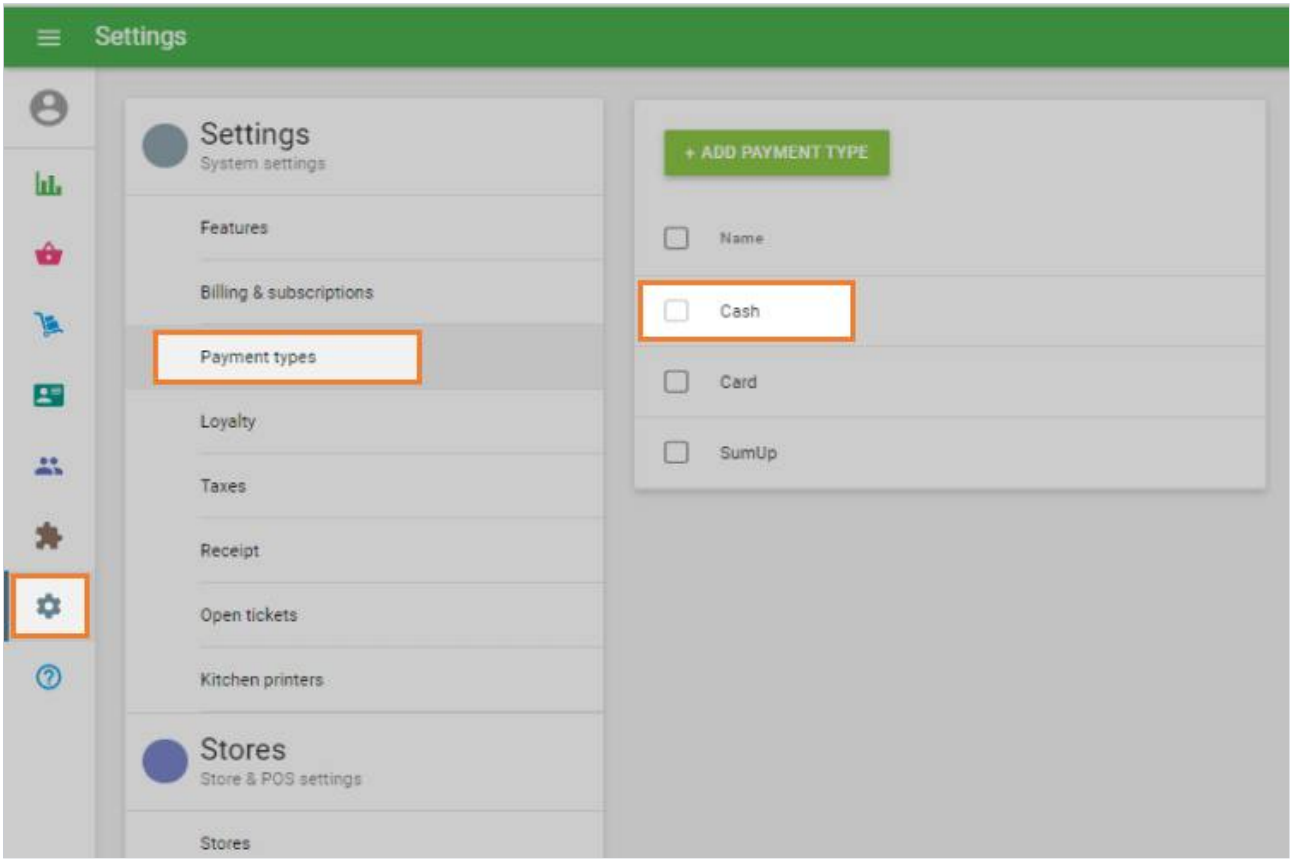
Note: Rounding **does not impact taxes** or how they are calculated.

How to Set Up Cash Rounding

Log in to the **Back Office**.

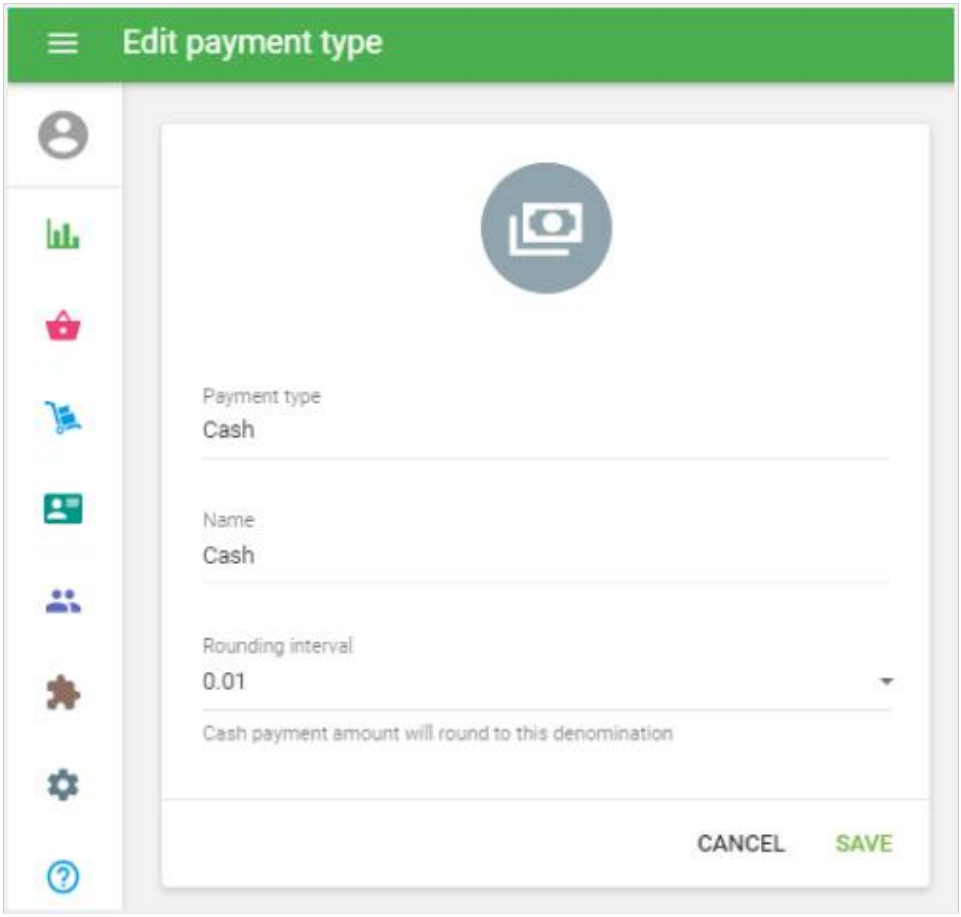
Go to **Settings > Payment Types**.

Click on the **Cash** payment type to edit it.



Configure Rounding Settings:

In the **Edit payment type window**, choose your preferred **rounding interval** from the drop-down list:



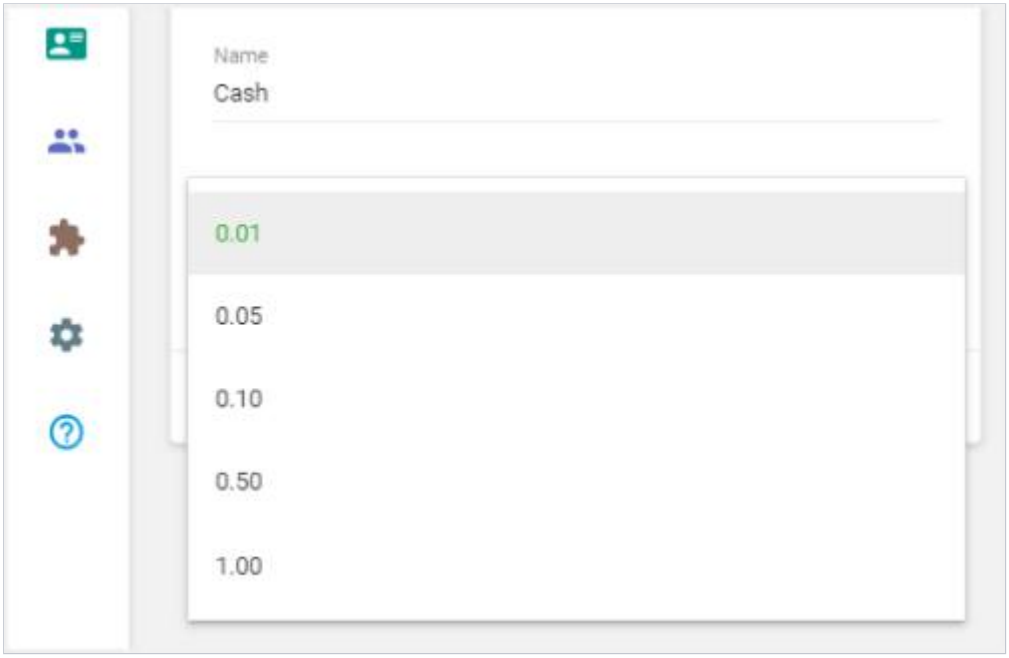
For currencies **with decimals**:

- 0.01 (default)
- 0.05
- 0.10
- 0.50
- 1.00

For currencies **without decimals**:

- 1 (default)
- 5
- 10
- 50
- 100

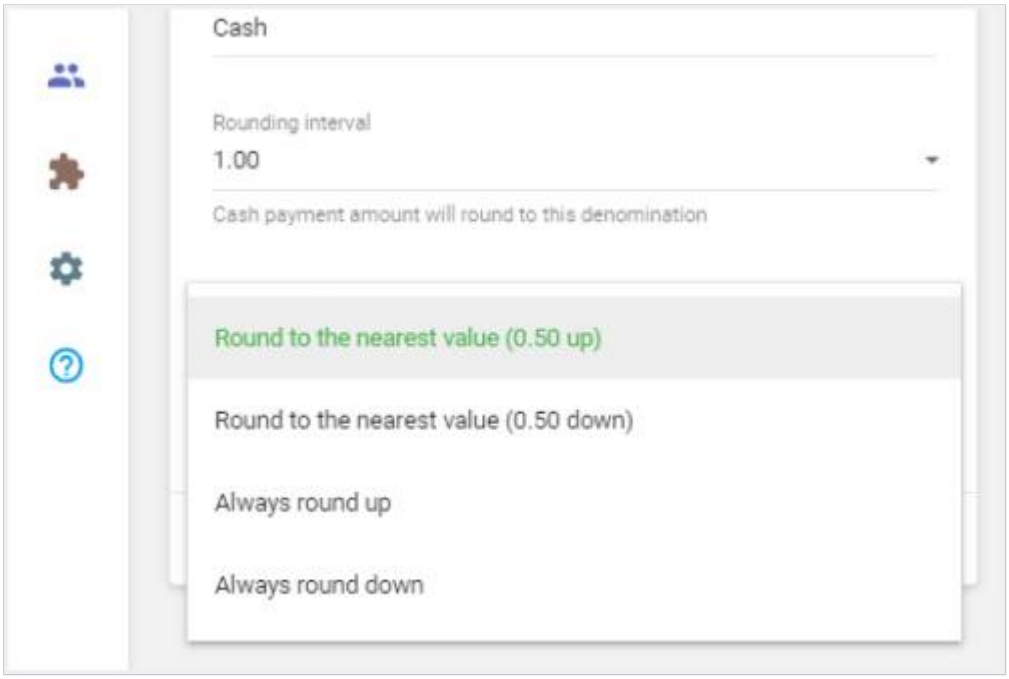
If the default interval (0.01 or 1) is selected, rounding rules are **not available** because no rounding will be applied.



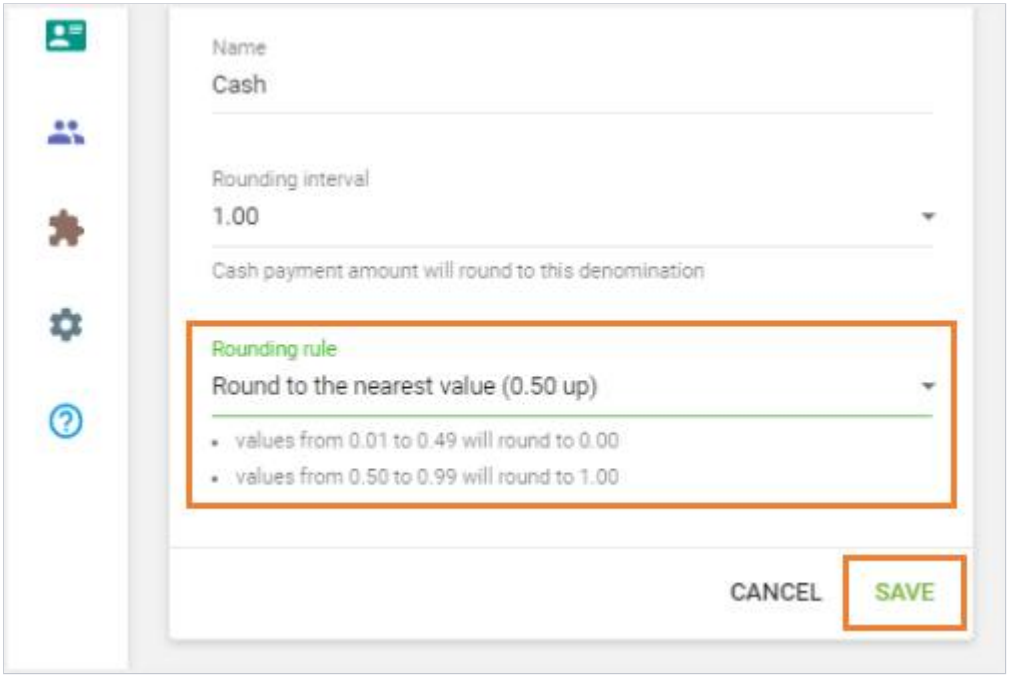
Choose a Rounding Rule:

When a custom interval is selected, you can choose one of the following rounding rules:

- **Round to the nearest value (average value up)** – default
- **Round to the nearest value (average value down)**
- **Always round up**
- **Always round down**



A short explanation will appear to show how the selected rule works.

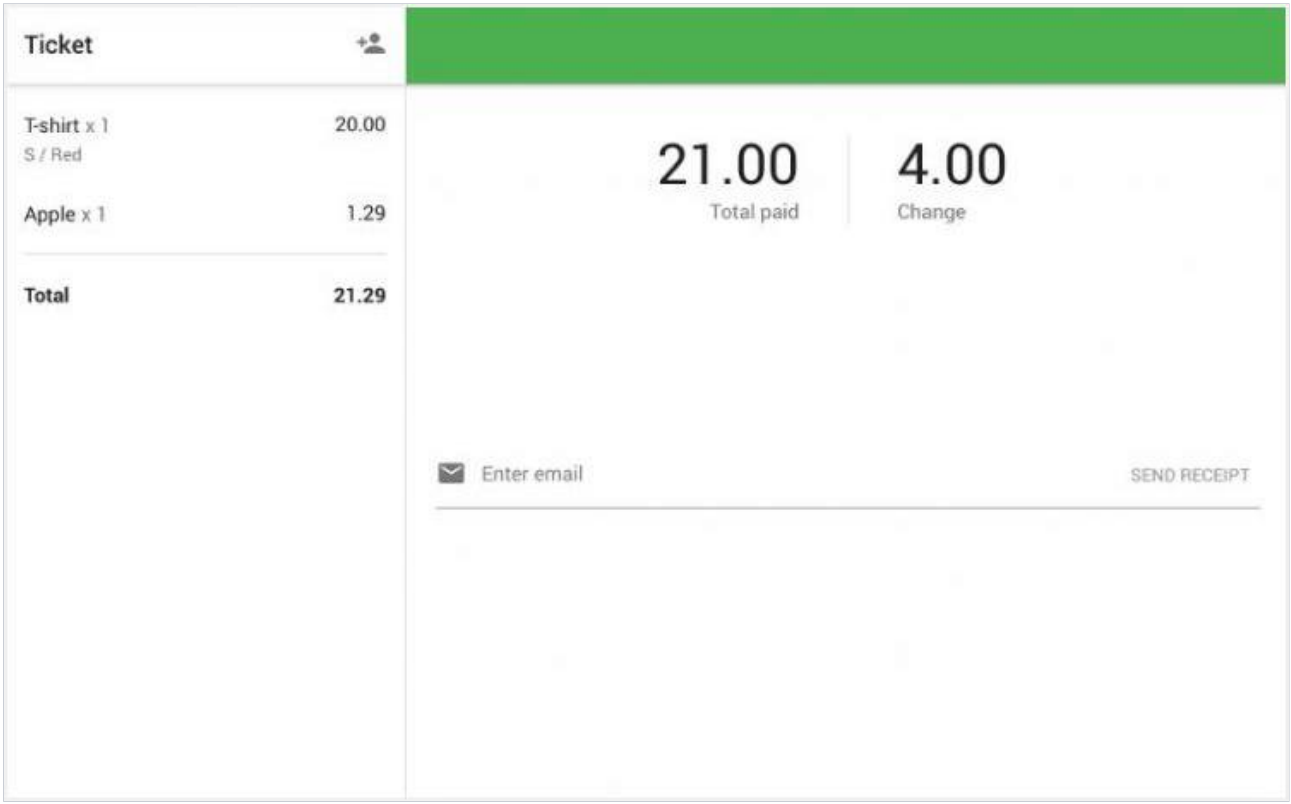


Don’t forget to **Save** the changes.

How Cash Rounding Works at the POS

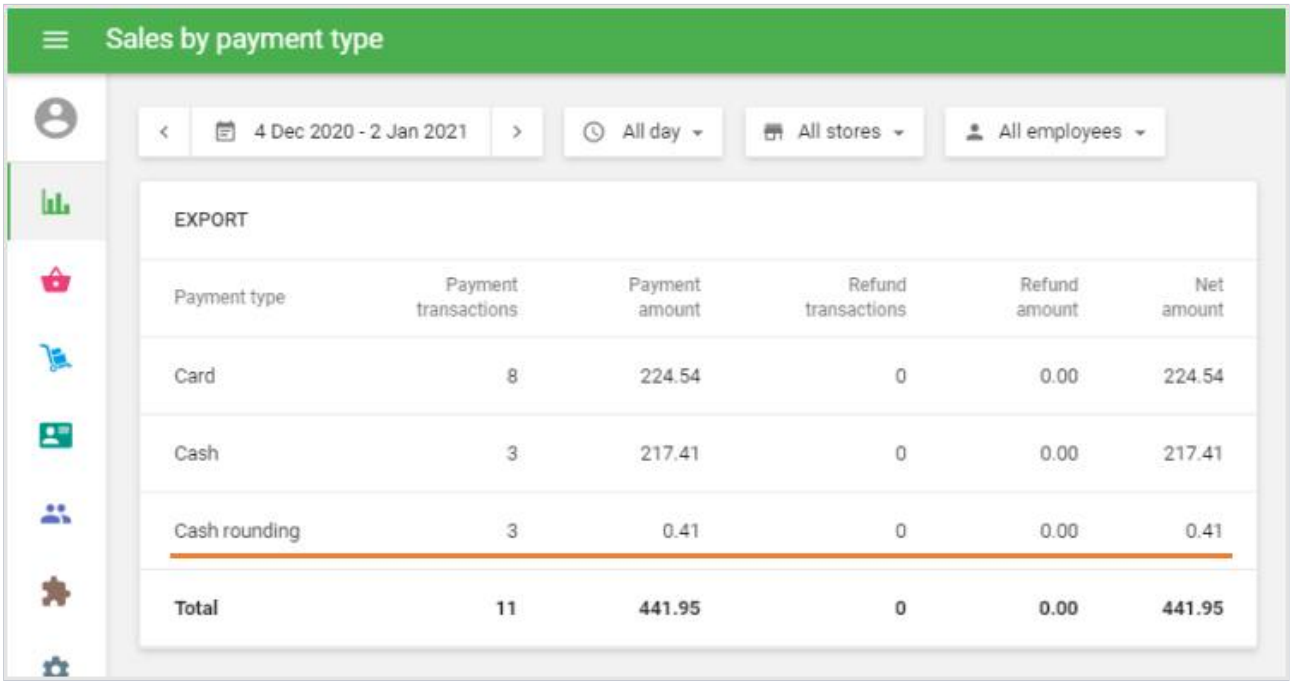
When cash rounding is enabled:

- At the **sale screen**, once you select **Cash** as the payment method, the **total amount will be rounded** according to the rules you've set.
- In the ‘**Cash received**’ field, you will see the rounded total.
- After you enter the amount of cash received and tap ‘**Charge**’, the **change due** will be calculated based on the rounded total.



Where You Can See Rounding Information

- **Receipts** will clearly show the rounding adjustment.
- In the **Back Office**, you can view rounding amounts in the **Sales by Payment Type** report.



Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	8	224.54	0	0.00	224.54
Cash	3	217.41	0	0.00	217.41
Cash rounding	3	0.41	0	0.00	0.41
Total	**11**	**441.95**	**0**	**0.00**	**441.95**

Items

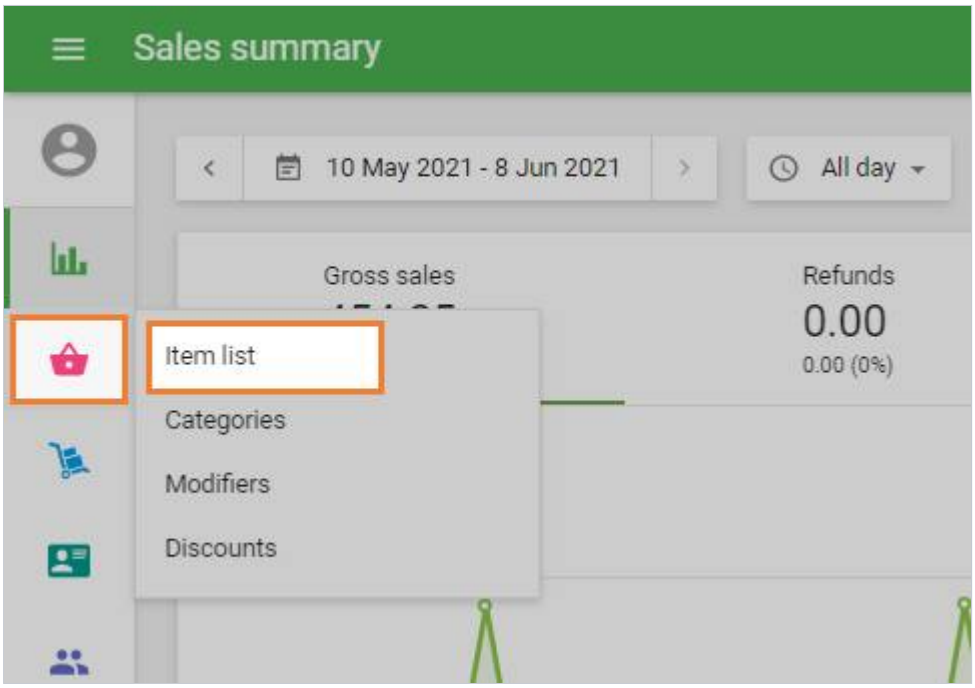
How to Add Items in the Loyverse Back Office

Video
https://www.youtube.com/watch?v=0DbQ7G---yc

While adding items directly from the Loyverse POS app on your mobile device is quick and easy, using the Back Office provides access to more advanced item management features.

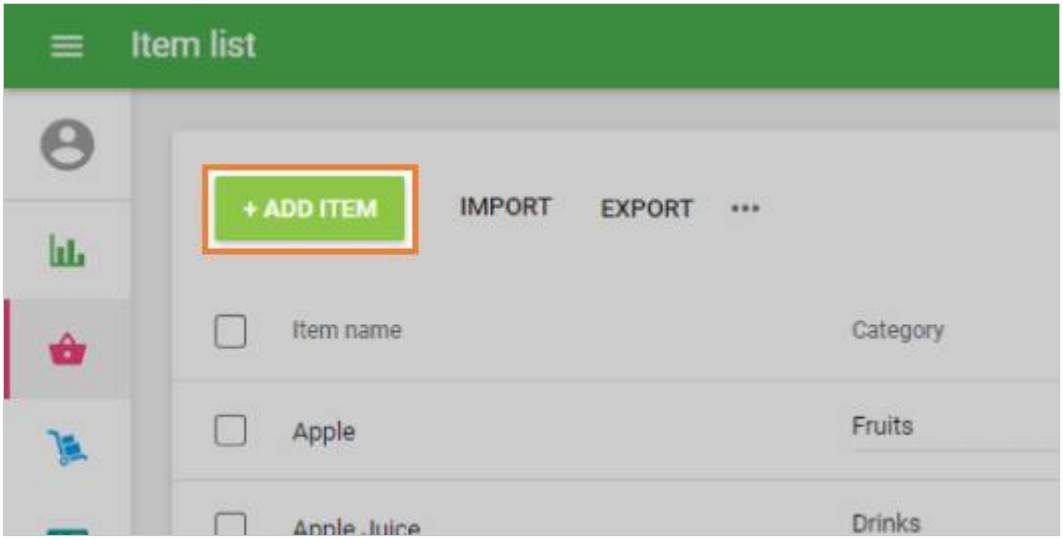
1. Access the Item List

Go to the '**Item list**' menu in the Back Office.



2. Create a New Item

Click the '**Add item**' button.



In the 'Create item' form:

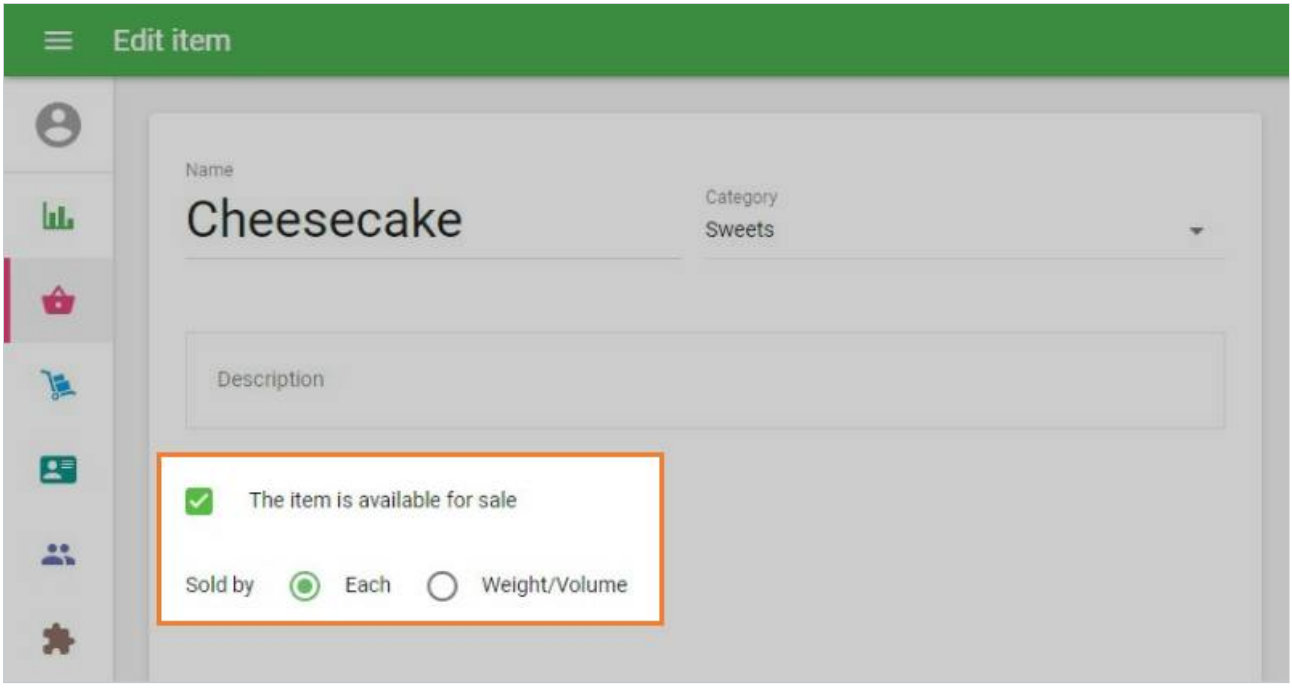
- **Name** – Enter the name of the item.
- **Category** – Select an existing category or create a new one.
- **Description** – Optional field used mainly for e-commerce and online ordering services connected to Loyverse. It can also be retrieved through the Loyverse API.
  Additionally, the description becomes visible in the Loyverse POS app for items added to the ticket, which can help staff see extra details about the product during sales.

Note: The Description field is not available for editing in the Loyverse POS app and cannot be used for item searches there.

3. Availability and Sales Options

If you **deselect** the '**The item is available for sale**' checkbox, the item will not appear on the POS sale screen. This is commonly used for components of composite items.

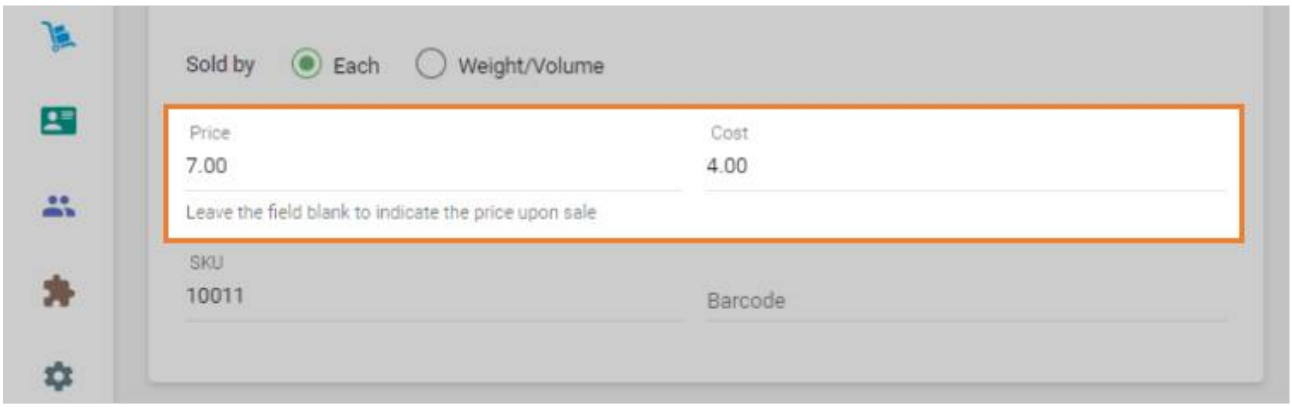
Sold by – Choose whether the item is sold **by each** (bottle, package, etc.) or **by weight/volume** (kilogram, liter, etc.).



4. Pricing and Cost

Price – Enter the selling price. If left blank, you will need to enter a price at the time of sale.

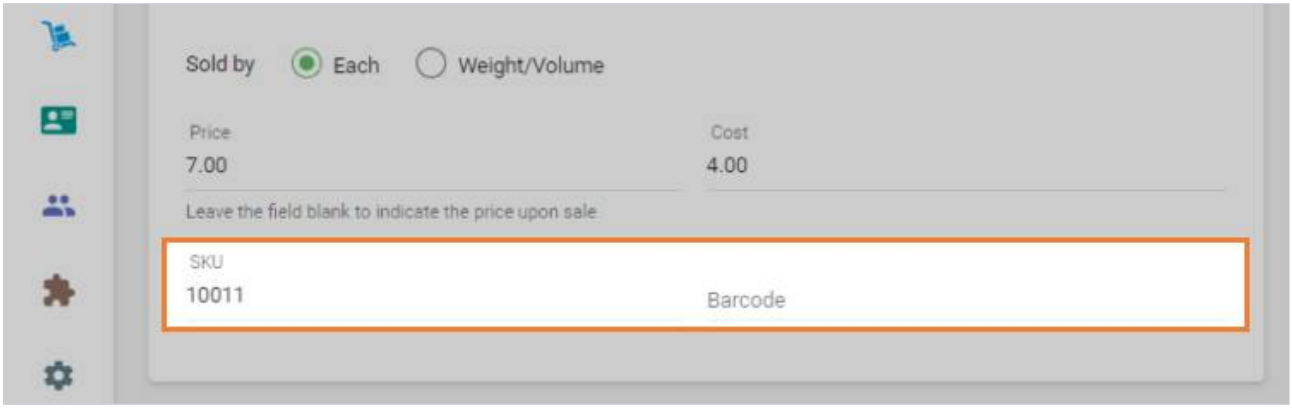
Cost – Enter the purchase cost to enable reports on profit, margin, and other performance metrics.



5. SKU and Barcode

SKU (Stock Keeping Unit) – Automatically generated, but you can set your own. It must be unique across all items, up to 40 characters, and can contain letters and numbers.

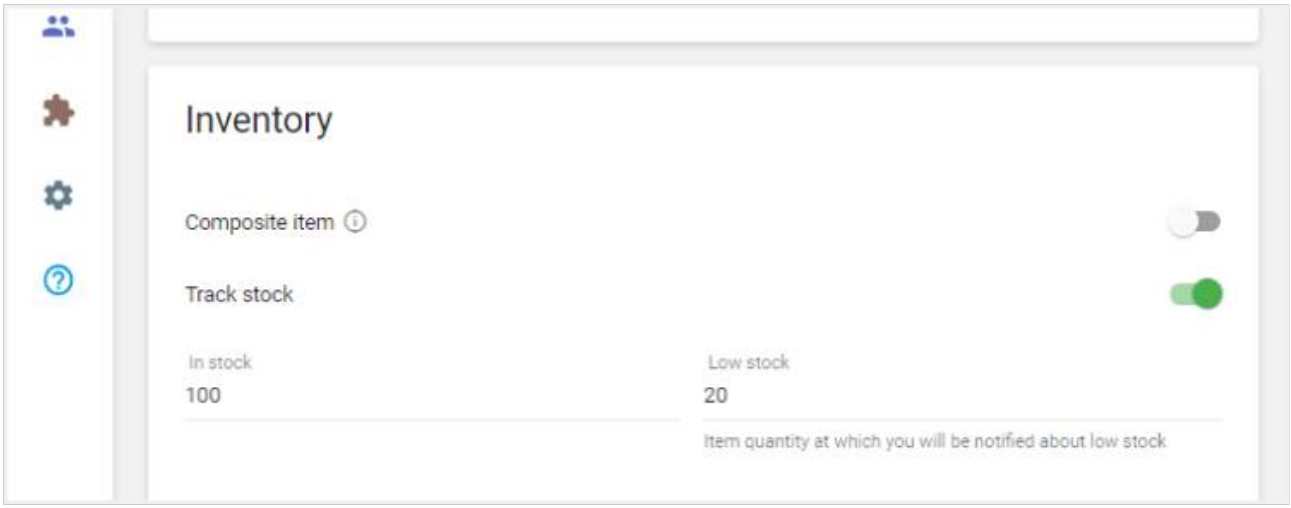
Barcode – Enter if applicable.



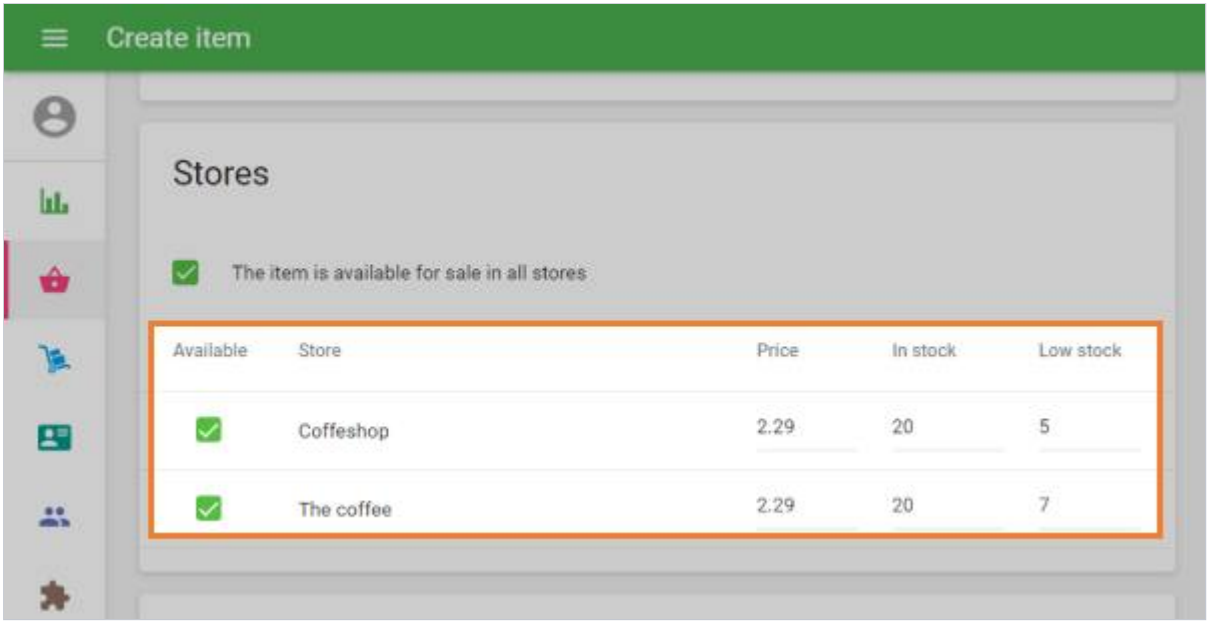
6. Inventory Settings

In the **Inventory** section, you can:

- Enable '**Composite item**' if the product is made from other items.
- Enable '**Track stock**' to manage stock levels and set low stock notifications.

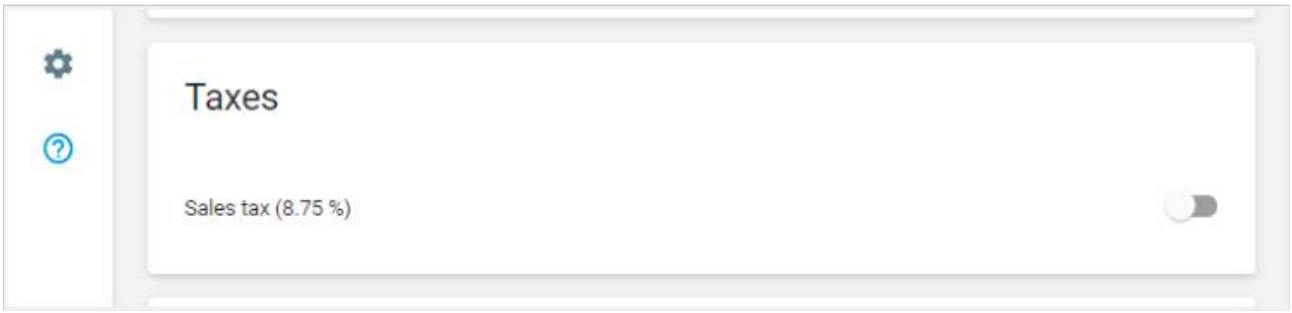


If you have multiple stores, you can customize per-store settings (price, in-stock quantity, and low stock) in the '**Stores**' section.

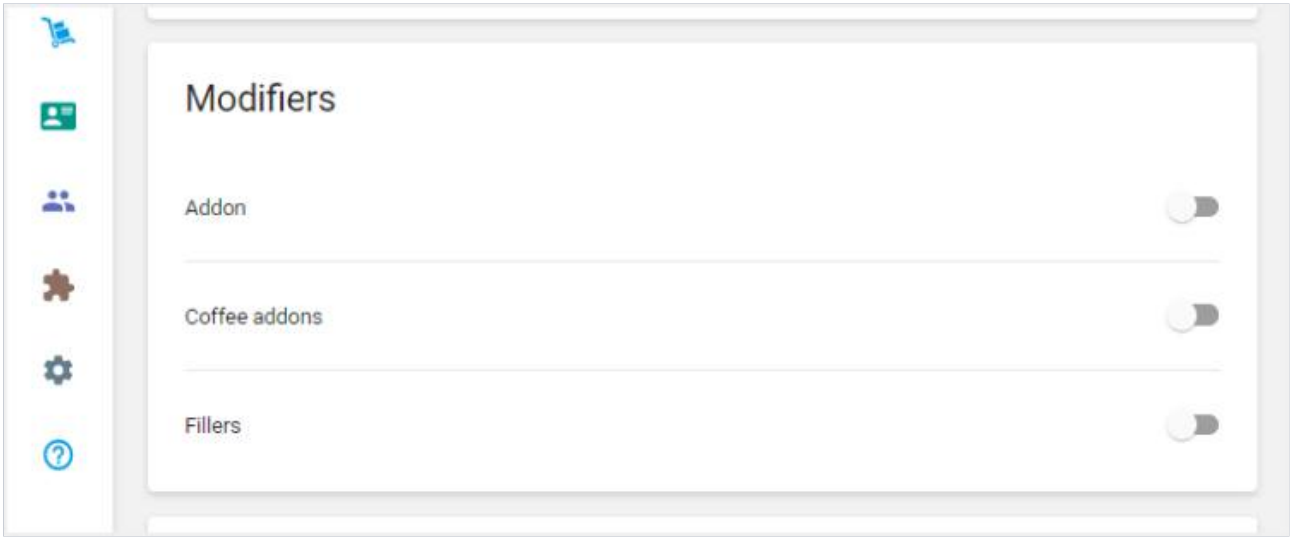


7. Tax and Modifiers

Tax – Assign applicable taxes.



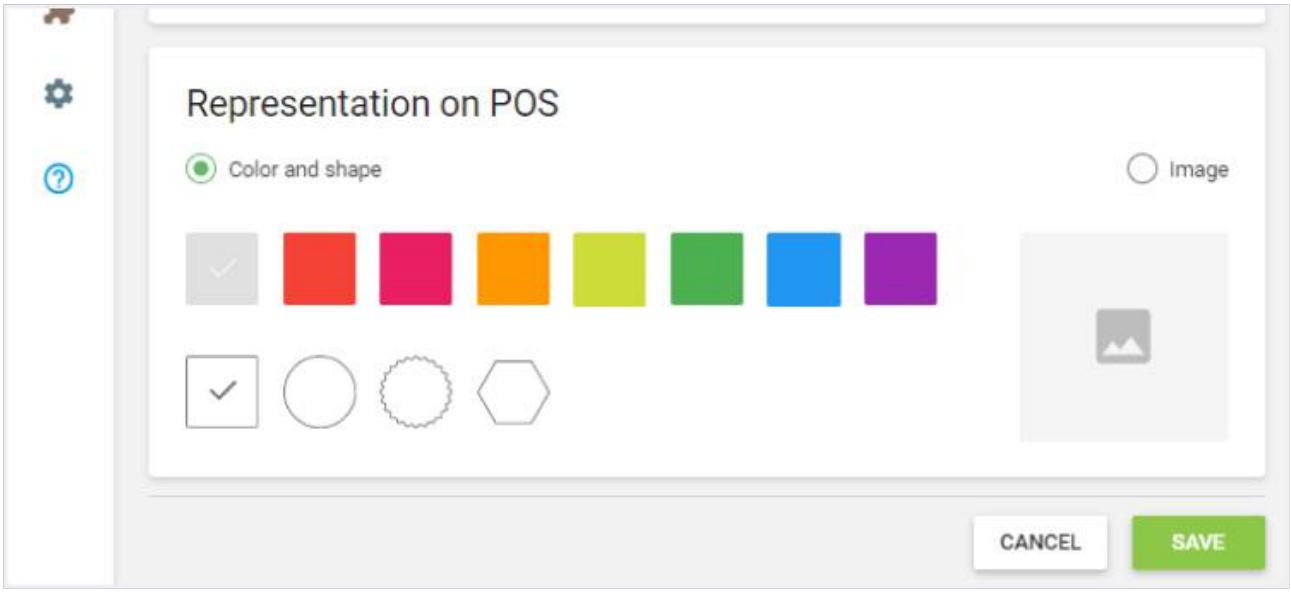
Modifiers – Select modifiers if the item offers customization options.



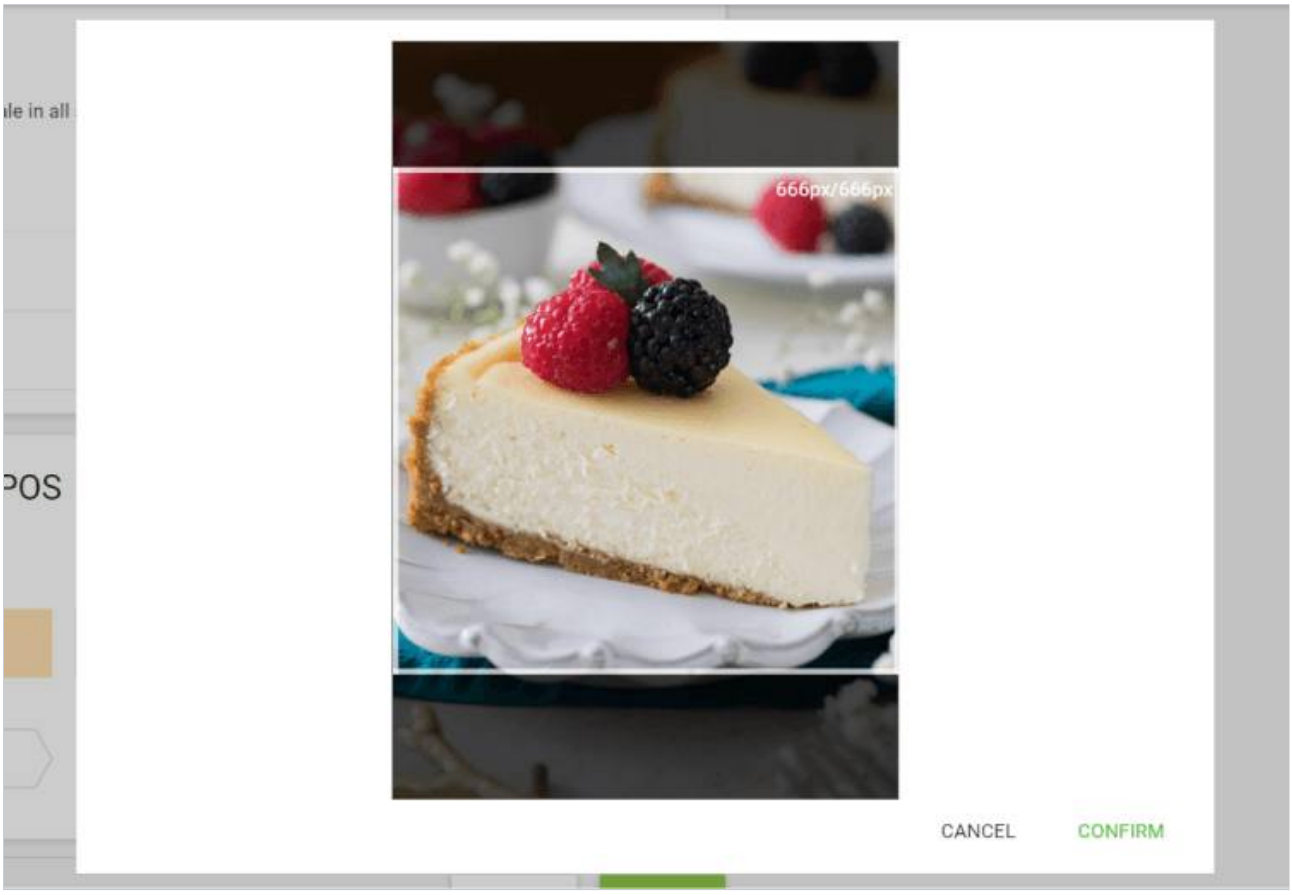
8. Appearance on POS

In the '**Representation on POS**' section:

- Choose a color and shape for the item icon, or
- Upload an image.



Note: Loyverse uses square images for item previews. If the uploaded image isn't square, you'll be prompted to crop it. Adjust the selection and click **Confirm**.



9. Save Changes

Once all details are entered, click **Save** to add the item.

See also:

[How to Add Items and Categories in Loyverse POS]

[Exporting and Importing Items]

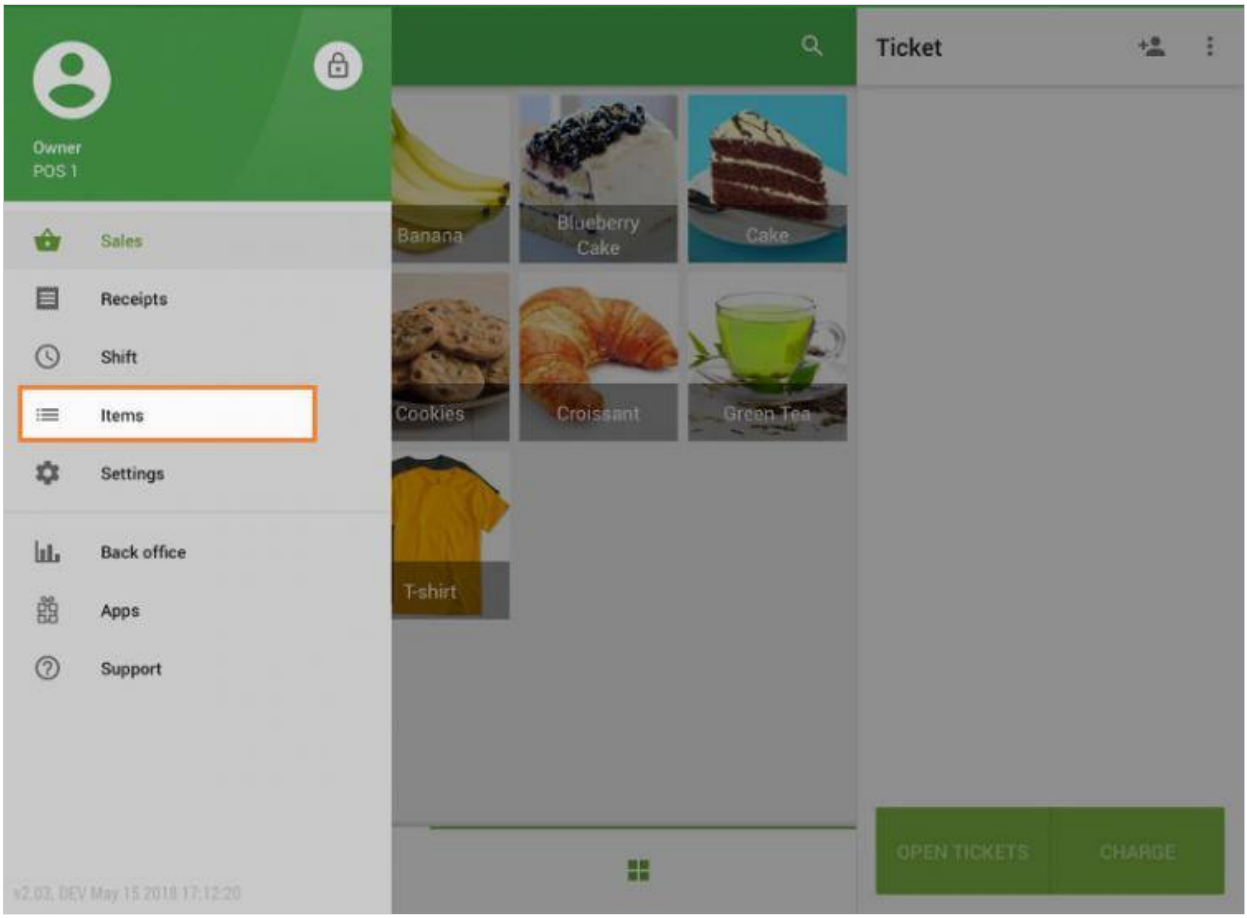
Working with the Items List in the POS

Video
https://www.youtube.com/watch?v=cKEGPfM26KE

The Items section in the POS app allows you to view and manage the stock of your products directly from the device.

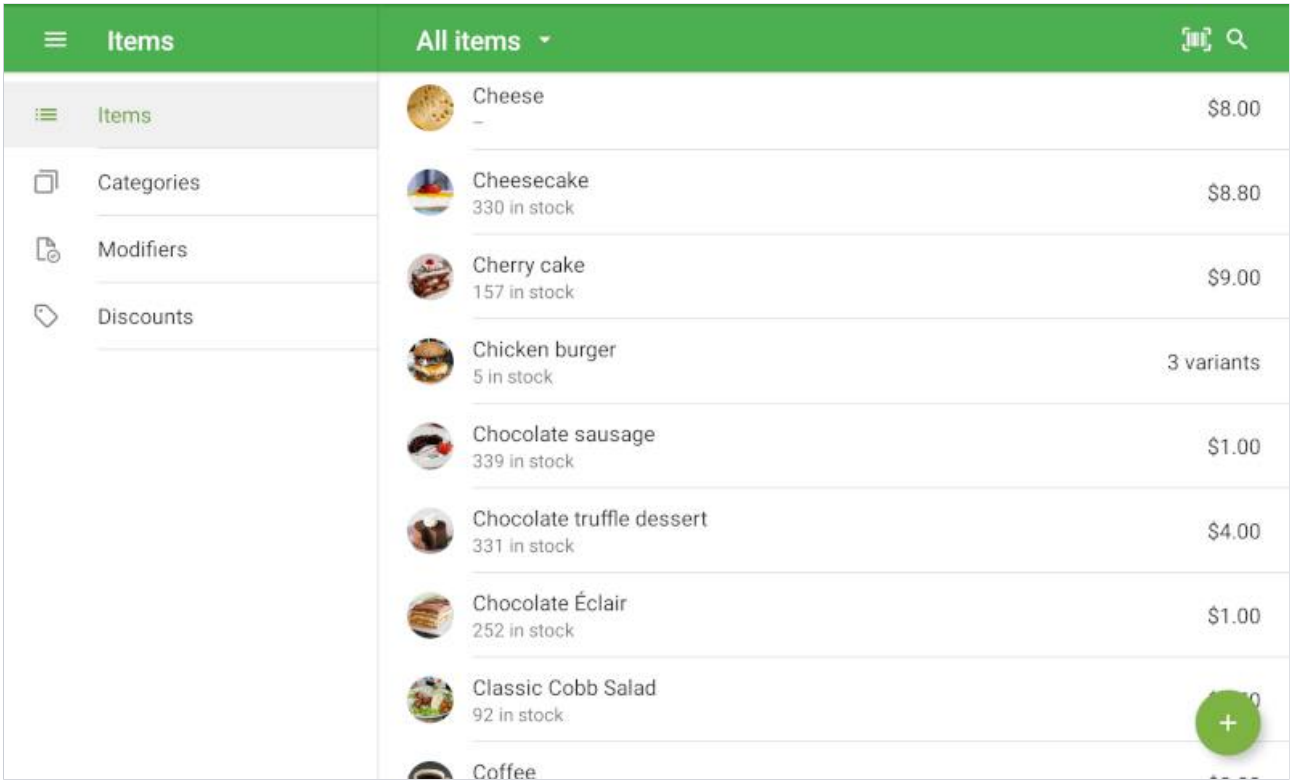
Viewing the Items List

Go to the **Items** section from the main menu.



You will see the list of items with the **current stock quantity** displayed under each item name.

- If stock tracking is **disabled** for an item, a dash symbol (–) will be shown instead of a quantity.

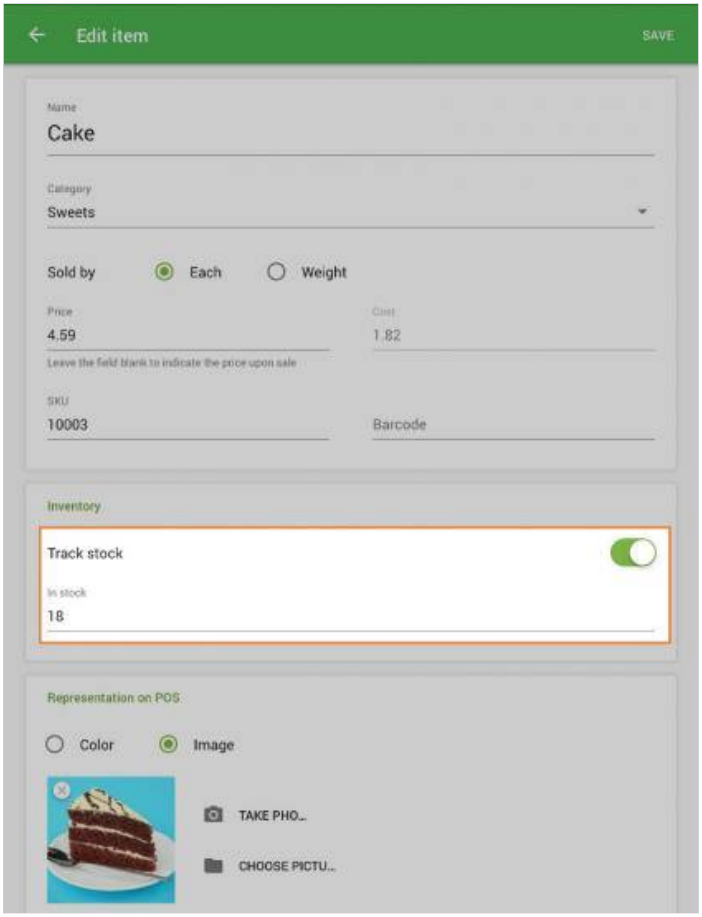


Updating Stock for an Item

Tap on the desired item from the list to open its card.

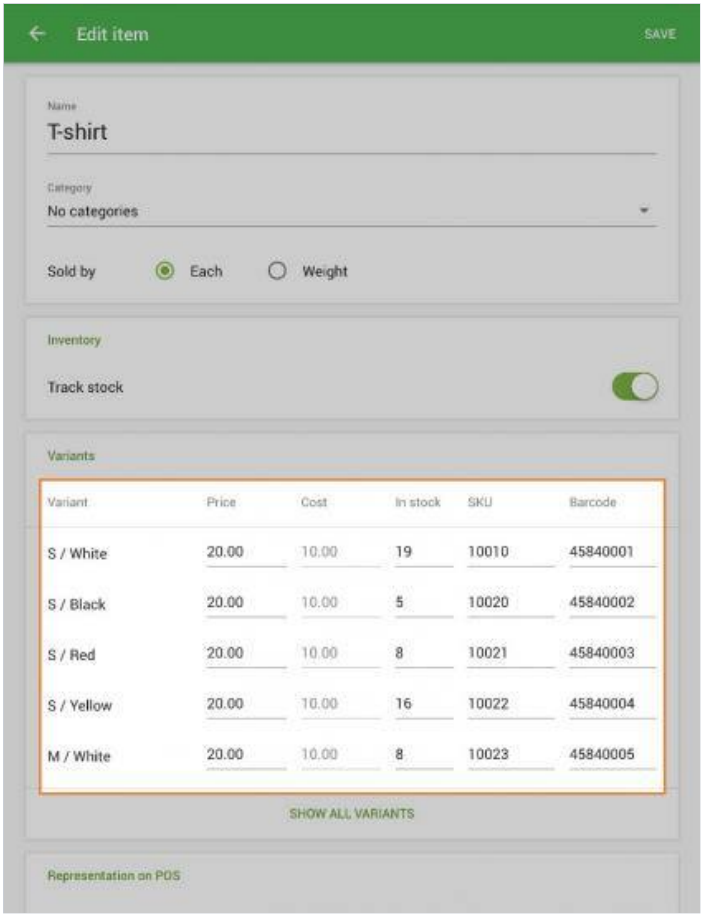
In the **Inventory** section:

- If stock tracking is disabled, enable the **Track stock** option.
- Enter the correct quantity in the **In stock** field.



Items with Variants

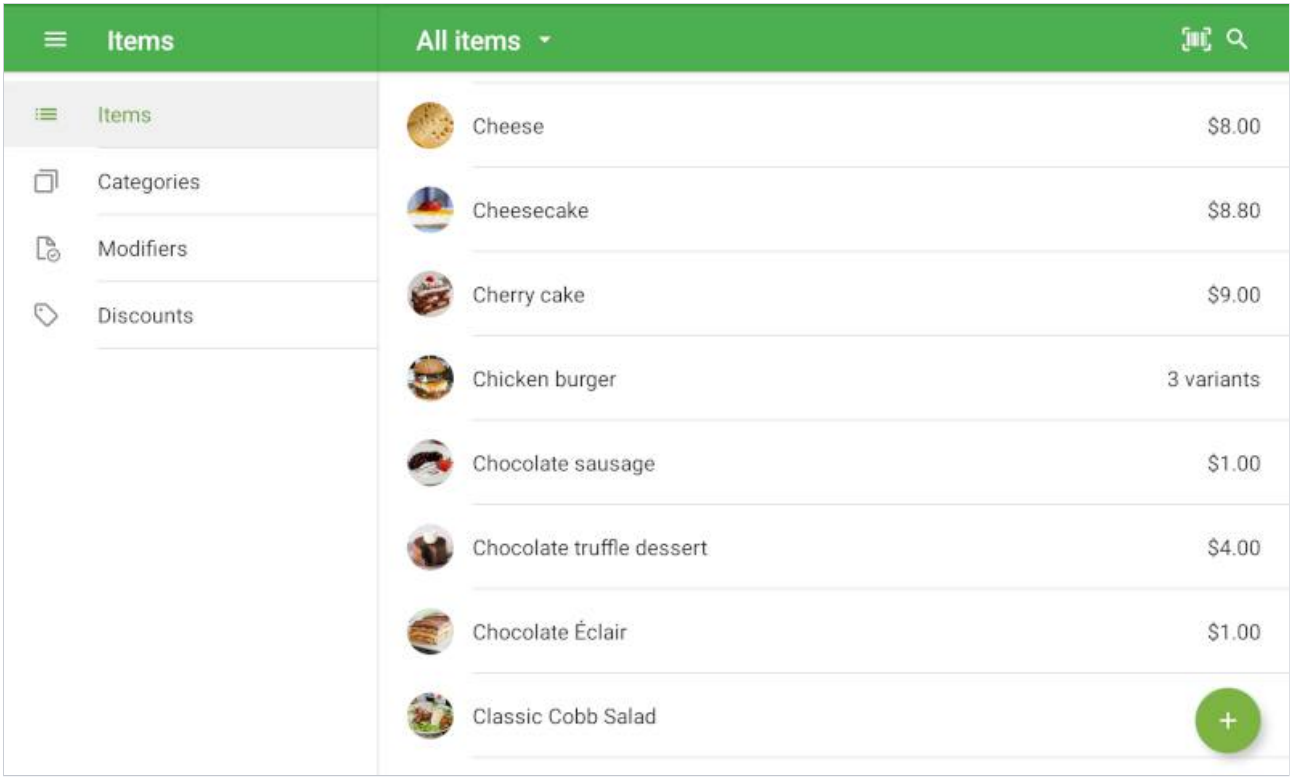
For items that have variants, you can specify **In stock**, **Price**, and **Cost** separately for each variant.



In the item list, the total stock displayed will be the **sum of all variants**.

Working in Offline Mode

If your POS is operating **without an Internet connection**, stock quantities will not be displayed in the items list.



Once the device reconnects to the Internet, stock levels will be updated automatically.

This way, sellers can quickly check available stock and update it directly in the POS, ensuring accurate inventory management even without accessing the Back Office.

See also:

How to Add Items and Categories in Loyverse POS

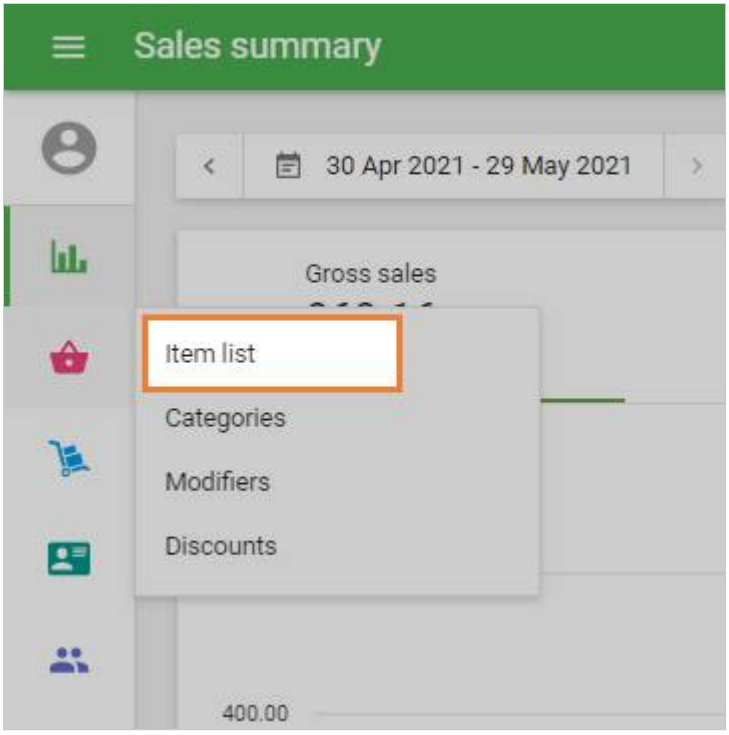
Notification About Low Stock

Video
https://www.youtube.com/watch?v=RlhlPa3jONE

Loyverse POS allows you to track low-stock items in the Back Office and receive **daily email notifications** when stock levels are low or items are out of stock. Setting this up takes just a few simple steps.

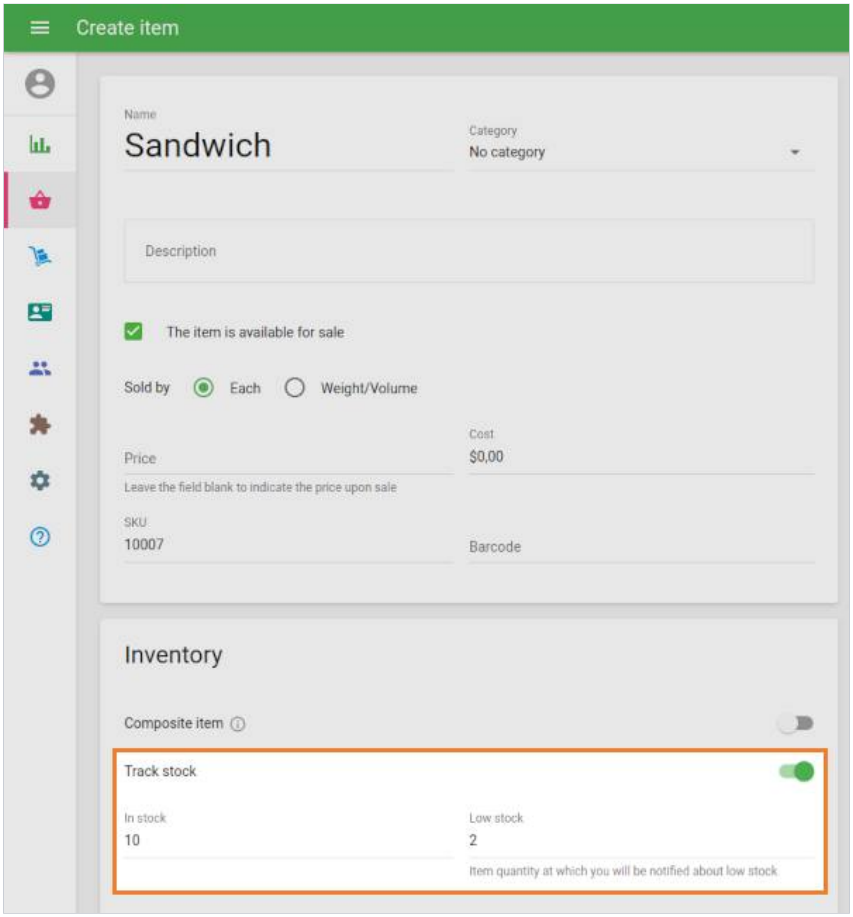
1. Enable Stock Tracking for an Item

In the Back Office, go to the **Item list**.



Open the item you want to edit.

Activate the **Track stock** option (if not already enabled).

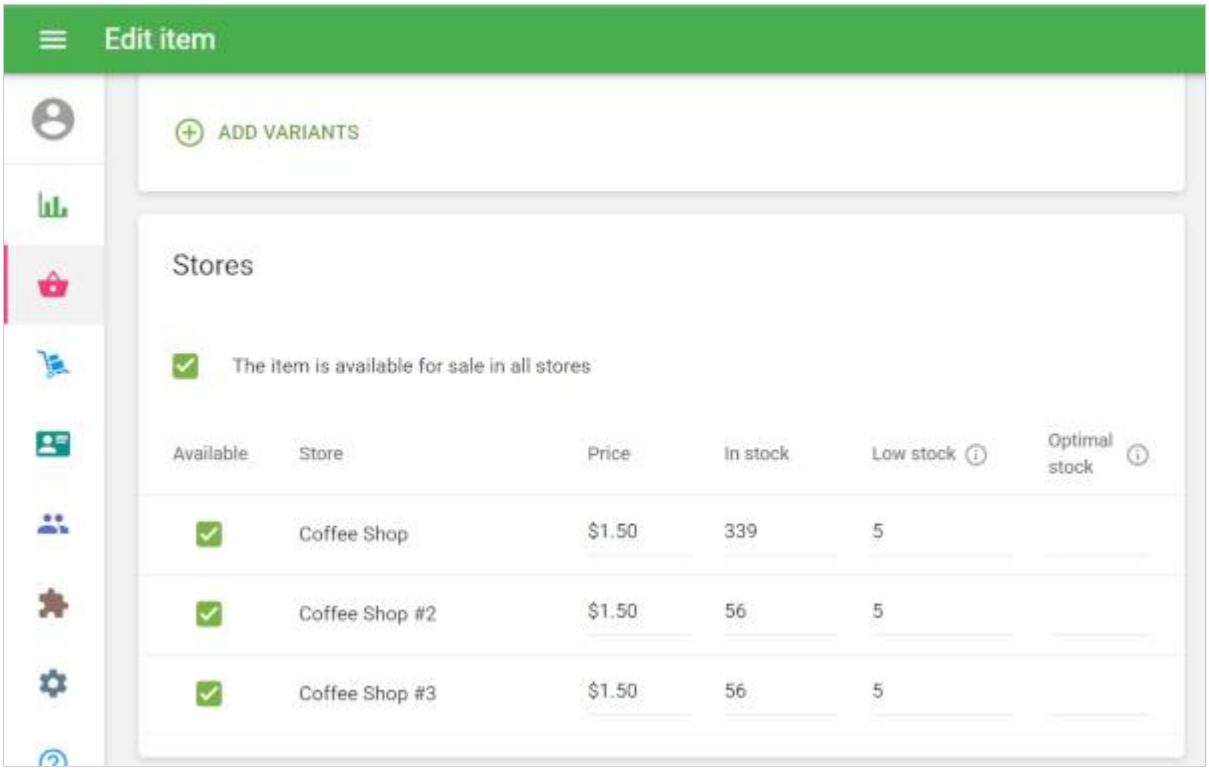


Under **In stock**, enter the current quantity of the item.

In the **Low stock** field, set the quantity at which you want to be notified.

Note: Stock is not tracked for **composite items** as a whole, but you can set low stock alerts for each of their **component**s.

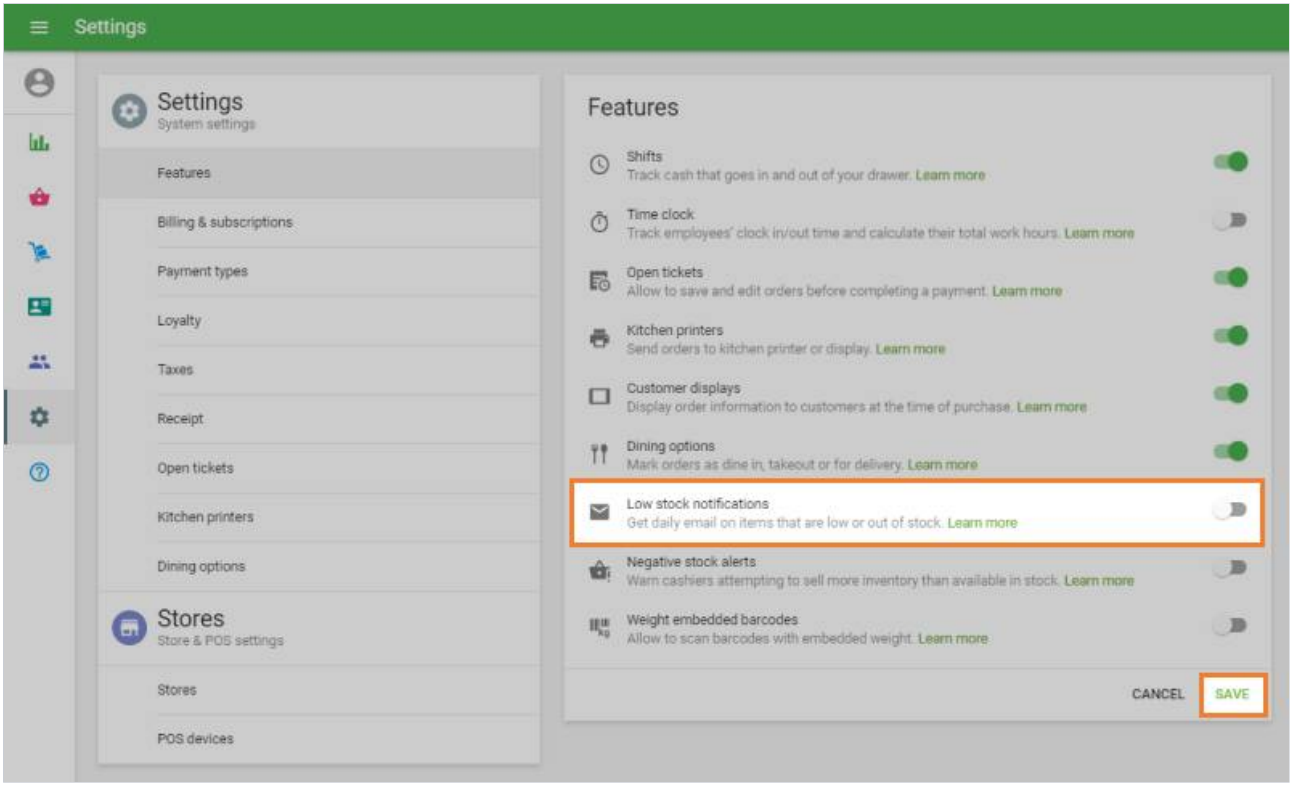
If you have **multiple stores**, the **In stock** and **Low stock** fields will appear in the **Stores** block for each store separately.



2. Enable Low Stock Notifications

In the Back Office, go to **Settings → Features**.

Make sure the option **Low stock notifications** is activated (it is enabled by default).



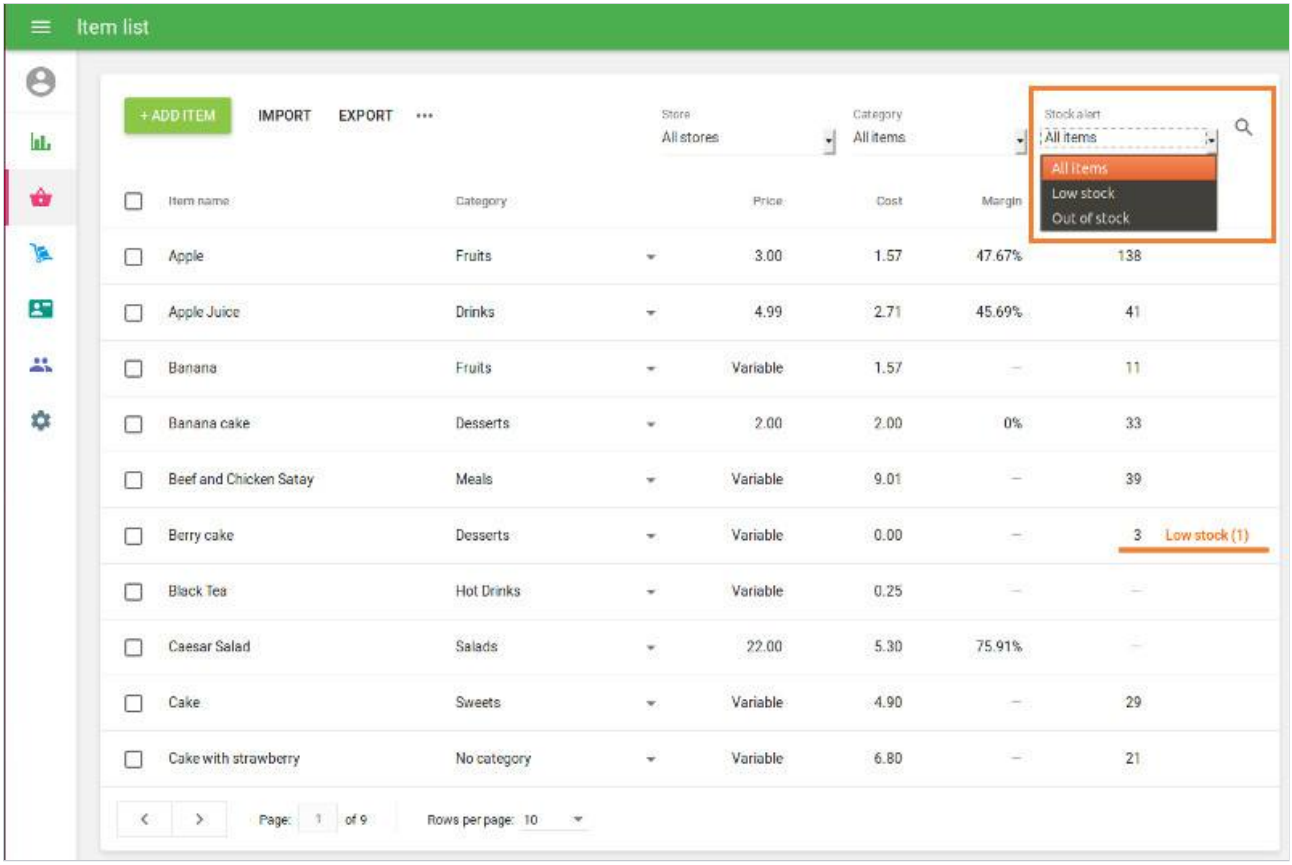
Save your changes.

Email notifications about low stock or out-of-stock items are sent daily at **10:00 AM** in the time zone specified in your Account settings. If no items meet the low stock condition, no email will be sent.

3. View Current Stock Levels Anytime

You don't need to wait for the email — you can check stock levels in real time:

- Go to the **Item list** in the Back Office.
- For items with **Track stock** enabled, you will see the current stock level.
- If an item is low or out of stock, a notification will appear next to it.



You can also use the **Stock alert** filter (top-right corner) to quickly view:

- All items
- Low stock items
- Out-of-stock items

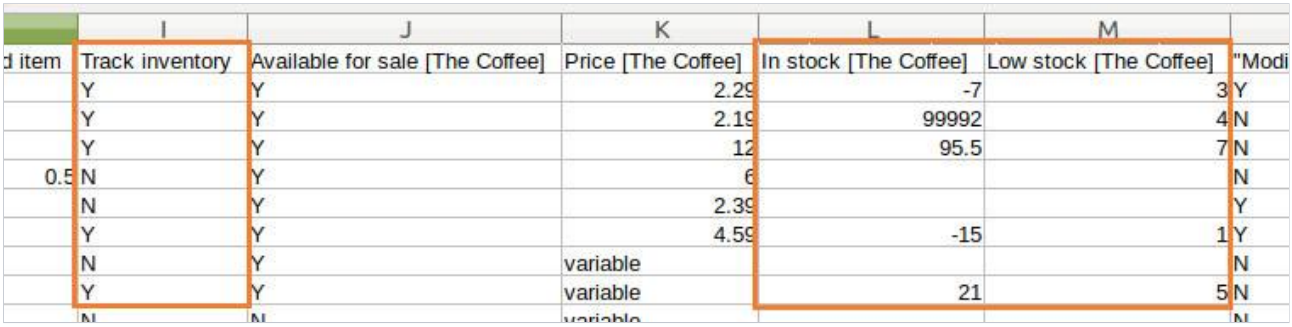
4. Batch Update Stock Settings via Import/Export

To make changes for multiple items at once:

1. Export your item list from the **Item list** section.

2. Open the CSV file for editing.

    - In the **Track stock** column, enter Y (Yes) to track stock or N (No) to disable tracking.
    - Update stock levels in the **In stock** column.
    - Set low stock alert levels in the **Low stock** column.



	I	J	K	L	M	
d item	Track inventory	Available for sale [The Coffee]	Price [The Coffee]	In stock [The Coffee]	Low stock [The Coffee]	"Modi
	Y	Y	2.29	-7	3	Y
	Y	Y	2.19	99992	4	N
	Y	Y	12	95.5	7	N
0.5	N	Y	6			N
	N	Y	2.39			Y
	Y	Y	4.59	-15	1	Y
	N	Y	variable			N
	Y	Y	variable	21	5	N
	N	N	variable			N

3. Save the file and import it back into the system.

5. Who Receives Low Stock Notifications?

Email notifications are sent to the **account owner** and employees who have the access right to **Manage items in the Back Office**.

With these settings, you'll never miss when products are running low, helping you restock on time and avoid missed sales.

See also:

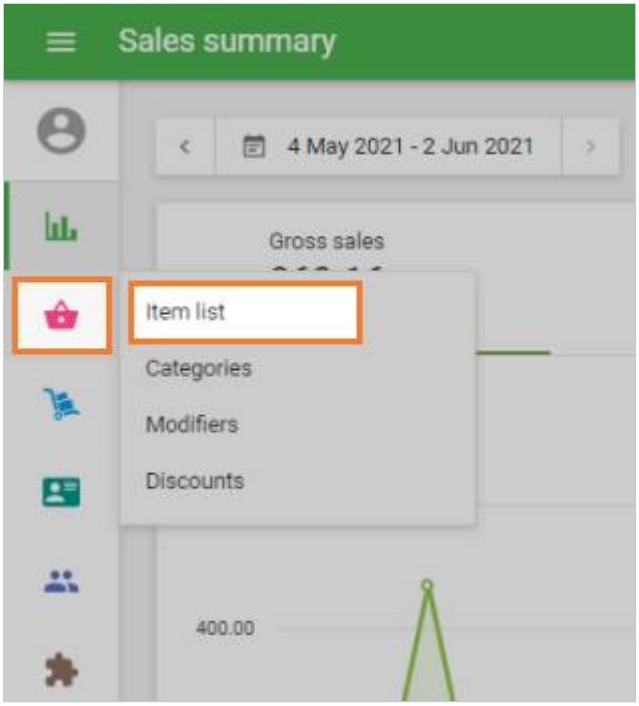
How to Add Items in the Loyverse Back Office

How to Add Barcodes to Items

Loyverse POS supports barcodes that can be scanned using compatible barcode scanners or the built-in camera of mobile devices. Adding barcodes to items allows you to speed up sales and inventory management.

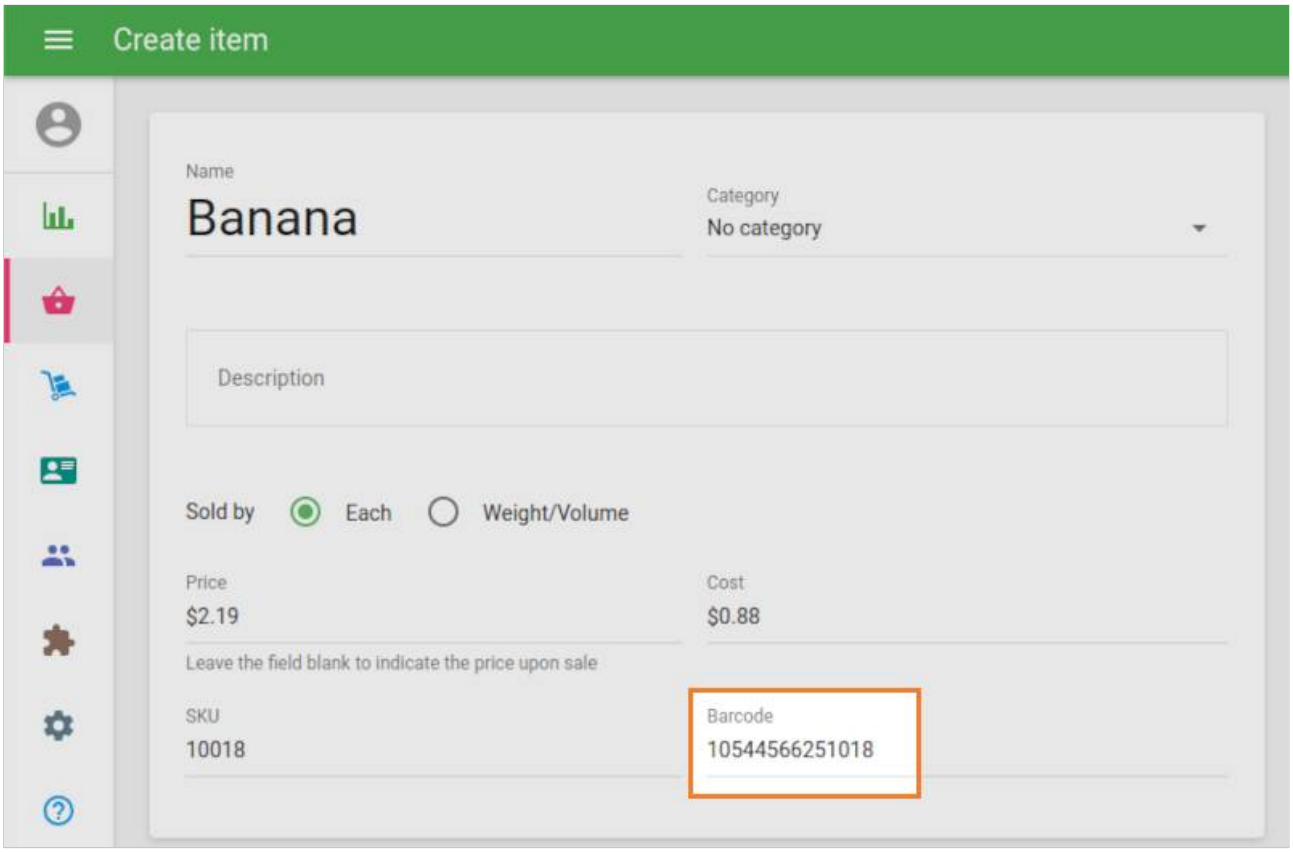
Adding Item Barcodes in the Back Office

Go to the **Item list** menu.



Find the item and open its card.

Enter the barcode manually into the **Barcode** field.



Alternatively, you can use a barcode scanner:

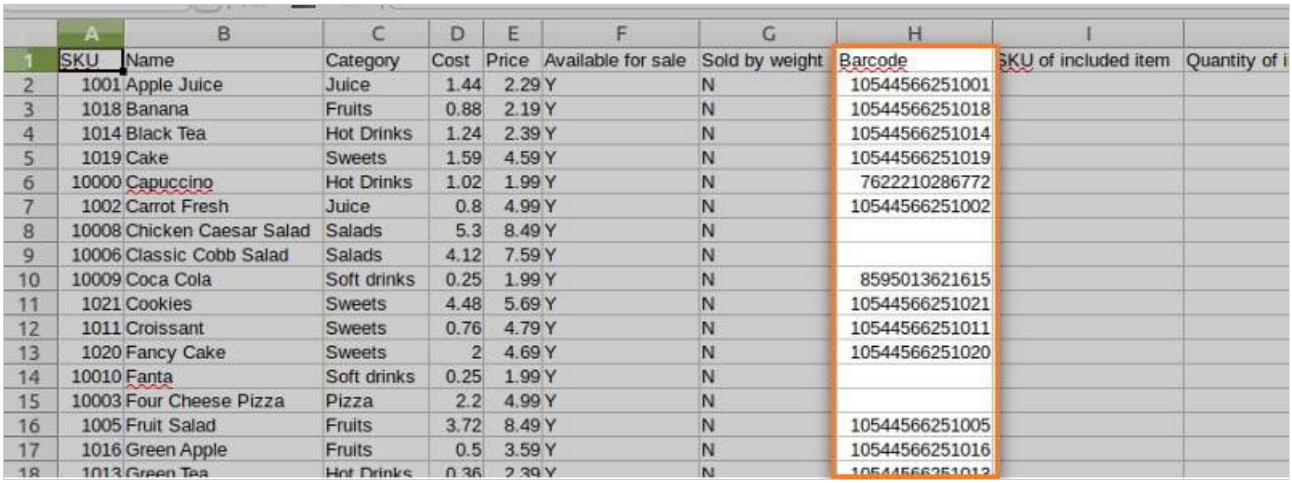
- Connect a scanner to your PC or tablet (the device you use for the Back Office).

- Click on the **Barcode** field to activate it.
- Scan the item's barcode tag, and the number will automatically appear in the field.

Note: Always make sure the **Barcode** field is active (clicked) before scanning with a scanner.

You can also add barcodes via **file import**:

- Export your items list.
- Enter barcodes into the **Barcode** column of the exported file.



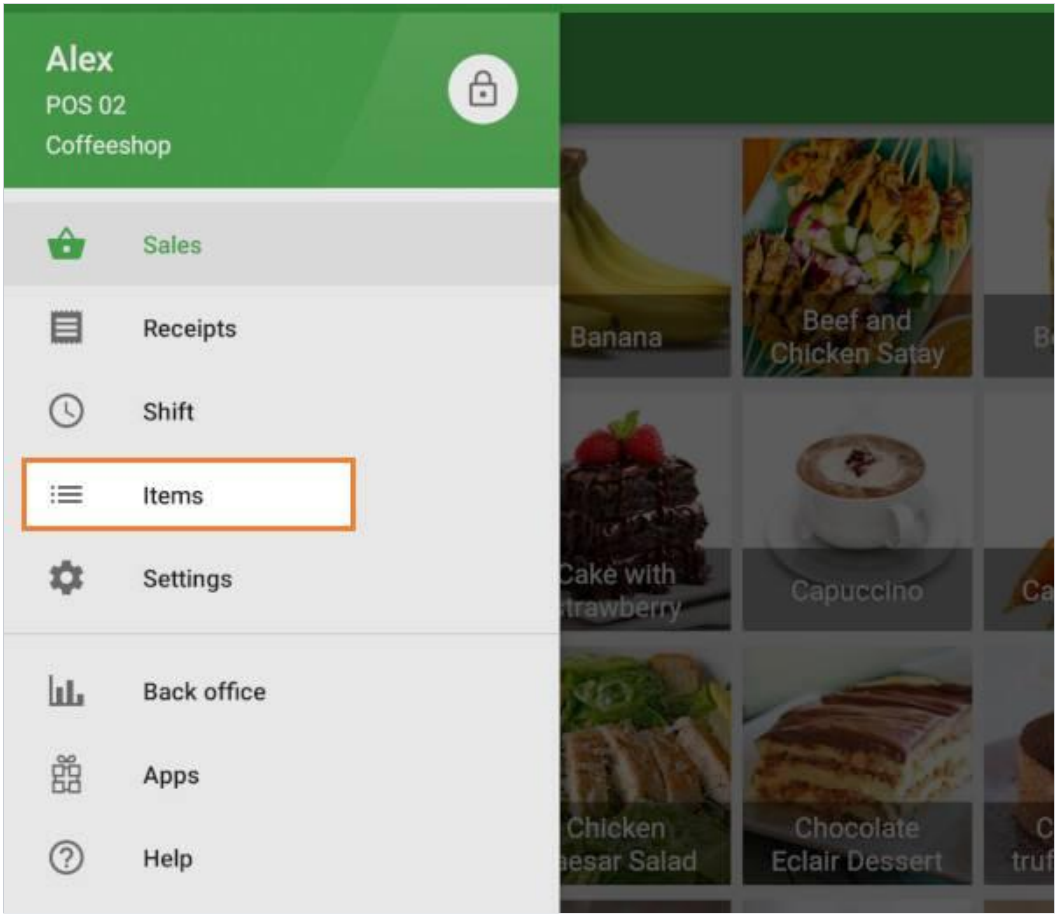
	A	B	C	D	E	F	G	H	I	
1	SKU	Name	Category	Cost	Price	Available for sale	Sold by weight	Barcode	SKU of included item	Quantity of i
2	1001	Apple Juice	Juice	1.44	2.29	Y	N	10544566251001		
3	1018	Banana	Fruits	0.88	2.19	Y	N	10544566251018		
4	1014	Black Tea	Hot Drinks	1.24	2.39	Y	N	10544566251014		
5	1019	Cake	Sweets	1.59	4.59	Y	N	10544566251019		
6	10000	Capuccino	Hot Drinks	1.02	1.99	Y	N	7622210286772		
7	1002	Carrot Fresh	Juice	0.8	4.99	Y	N	10544566251002		
8	10008	Chicken Caesar Salad	Salads	5.3	8.49	Y	N			
9	10006	Classic Cobb Salad	Salads	4.12	7.59	Y	N			
10	10009	Coca Cola	Soft drinks	0.25	1.99	Y	N	8595013621615		
11	1021	Cookies	Sweets	4.48	5.69	Y	N	10544566251021		
12	1011	Croissant	Sweets	0.76	4.79	Y	N	10544566251011		
13	1020	Fancy Cake	Sweets	2	4.69	Y	N	10544566251020		
14	10010	Fanta	Soft drinks	0.25	1.99	Y	N			
15	10003	Four Cheese Pizza	Pizza	2.2	4.99	Y	N			
16	1005	Fruit Salad	Fruits	3.72	8.49	Y	N	10544566251005		
17	1016	Green Apple	Fruits	0.5	3.59	Y	N	10544566251016		
18	1013	Green Tea	Hot Drinks	0.36	2.39	Y	N	10544566251013		

- Save the file and re-import it into the system.

Adding Barcodes Using the Loyverse POS App

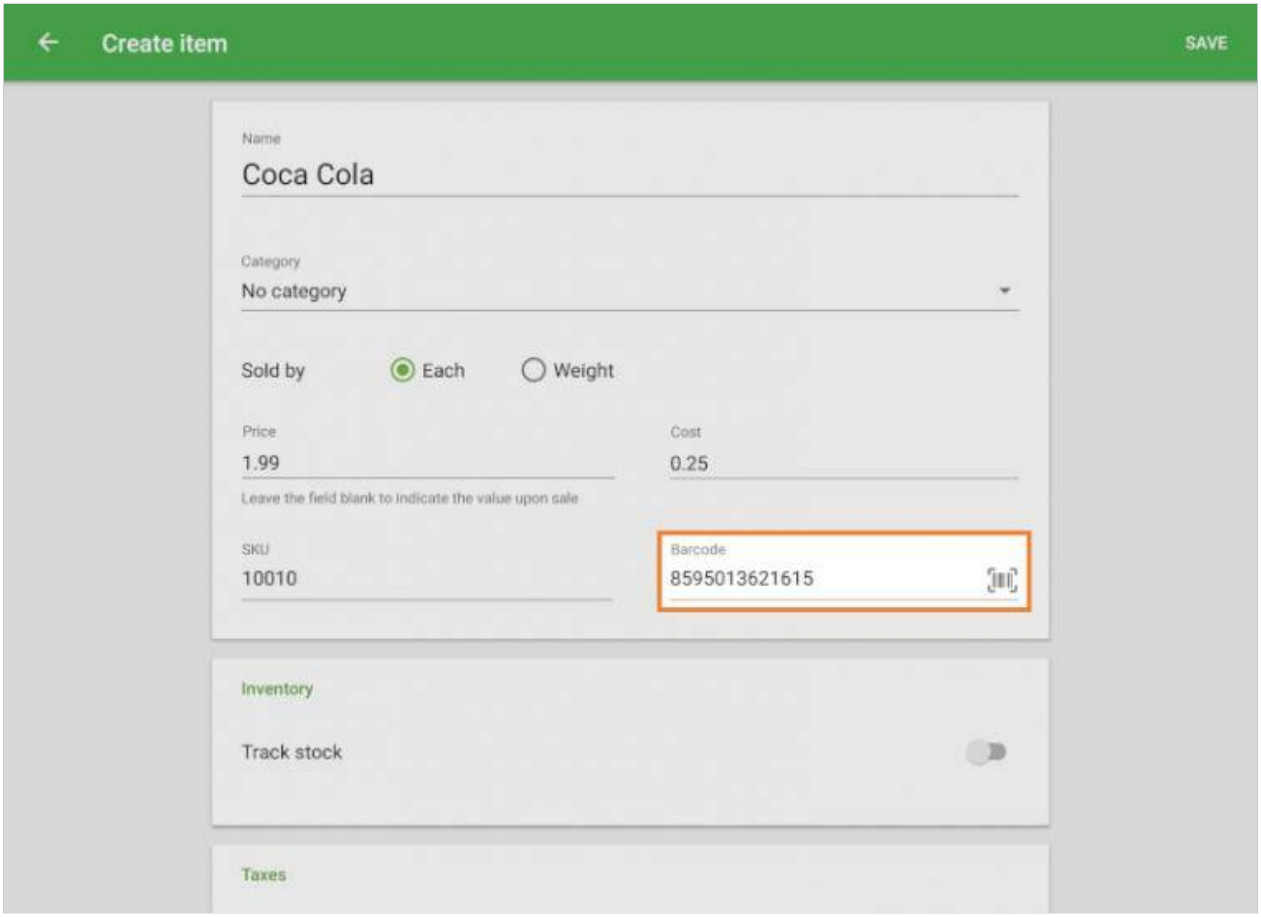
Open the POS app and tap the ☰ **menu** in the top-left corner.

Go to **Items**.



Open the item card you want to edit.

Enter or scan the barcode into the **Barcode** field.



On mobile devices, you can also use the **built-in camera** to scan barcodes:

- Tap the **barcode icon** in the right corner of the Barcode field.
- Use your device's camera to scan the barcode.

Now your items are ready to be sold and tracked using barcodes.

See also:

Socket 7Qi/7Ci (Bluetooth) Scanner Setup

How to Setup Motorola CS3070 (Bluetooth) Barcode Scanner

How to Sell Items Using Barcode Scanners

Barcodes Scanning by Built-in Device Camera

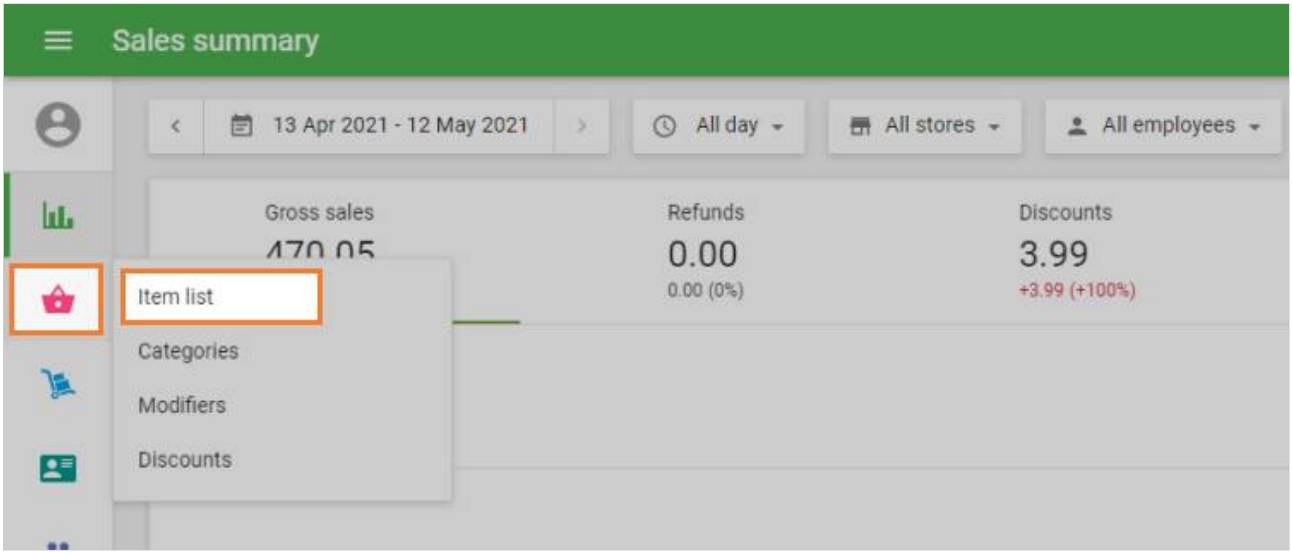
How to Use Variants of Items

Video
https://www.youtube.com/watch?v=mPVU0uEA4_c

The **Variants** feature allows you to manage items that come in multiple versions (such as different sizes, colors, or materials) without creating each one as a separate item. This helps you simplify your item list and makes management more efficient.

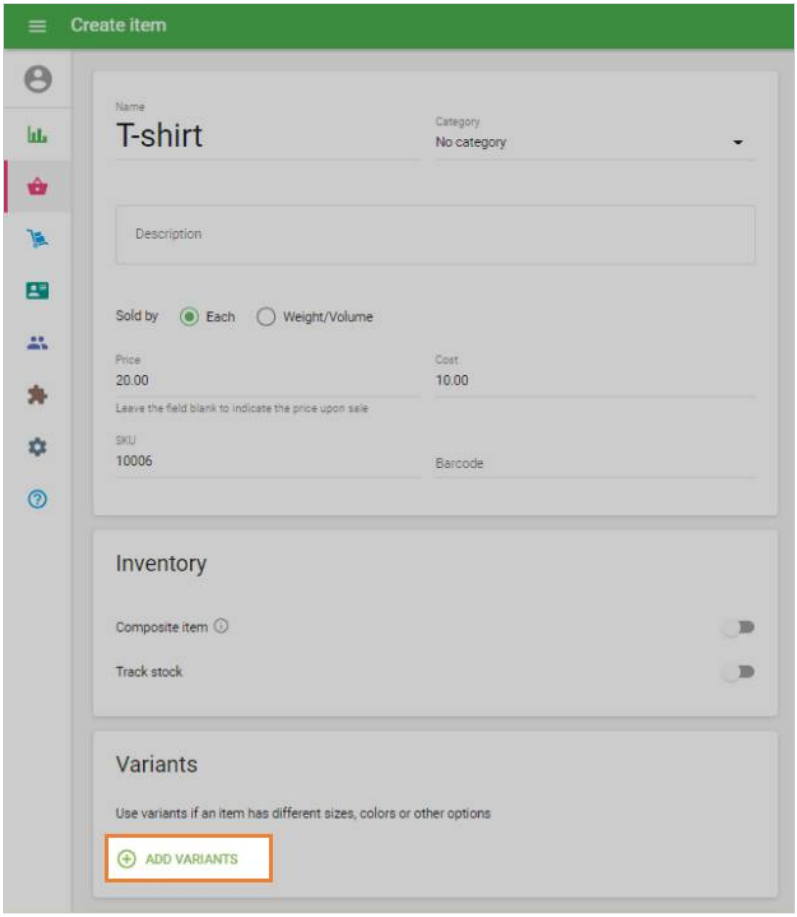
1. Creating and Setting Up Variants

Go to the **Item list** in the **Back Office**.



Open an existing item for editing, or create a new one.

In the **Variants** section, click **Add variants**.



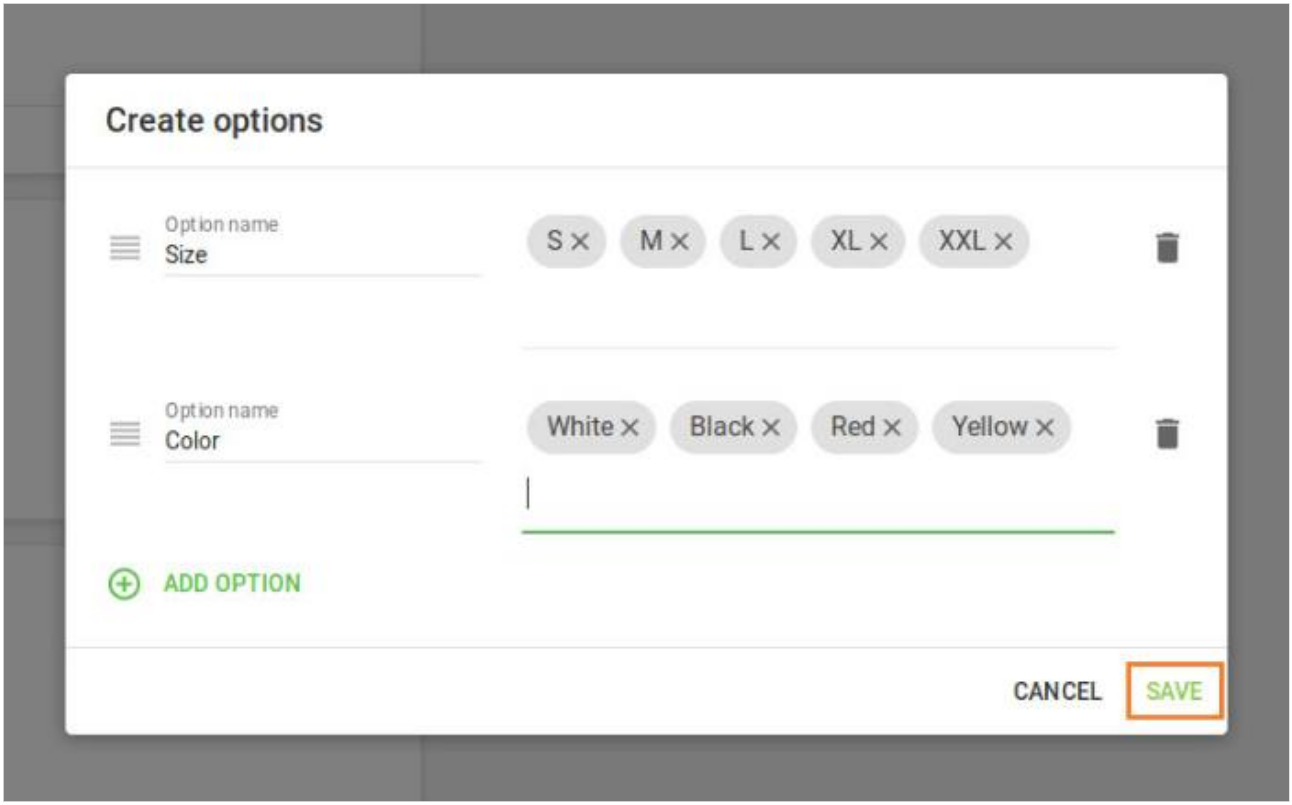
Enter the **Option name** (e.g., Size or Color) in the left field.



Enter the **Option values** (e.g., Small, Medium, Large or Red, Blue, Green) in the right field.

- Press **Enter** after each value to confirm.

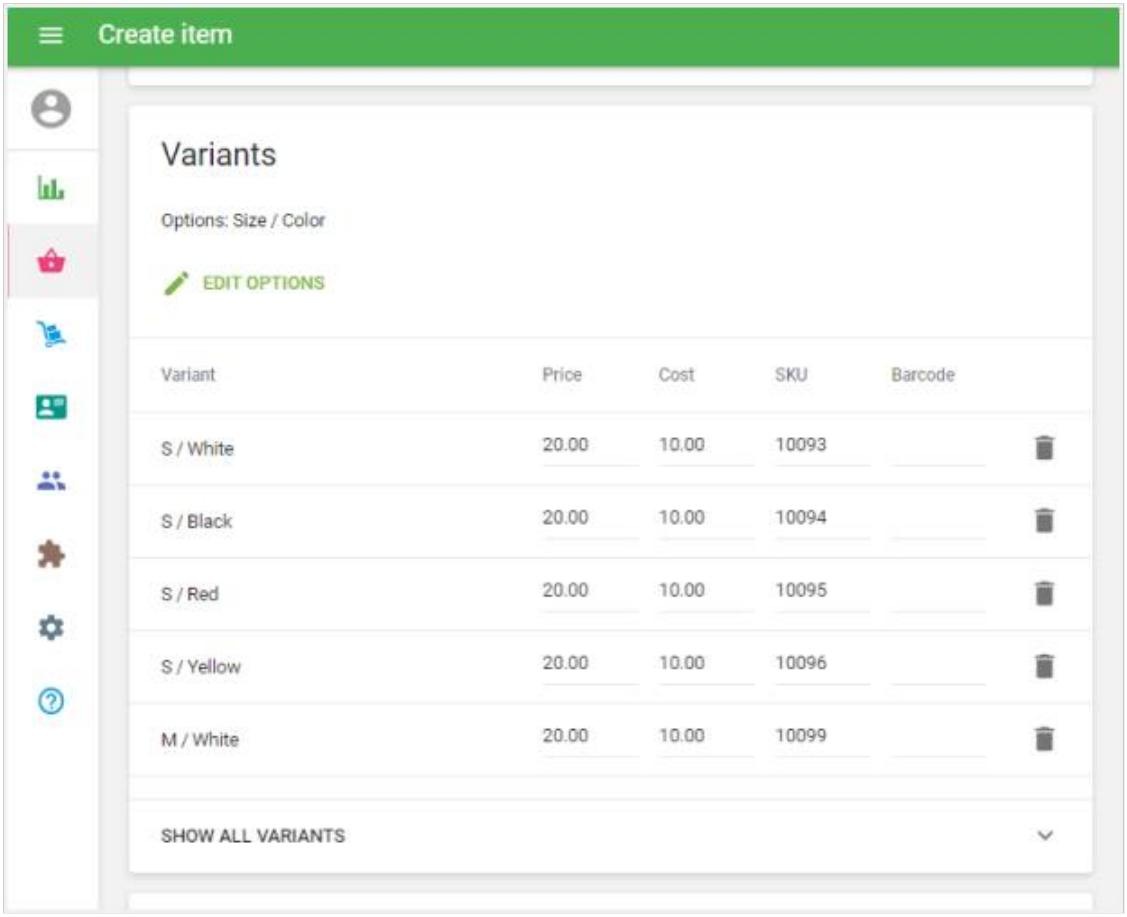
To add more options, click **Add option**.



- You can create up to 3 options per item.

Save your changes.

The system will automatically generate all possible combinations of options as separate **variants**.



Each item can have up to **200 variant combinations**.

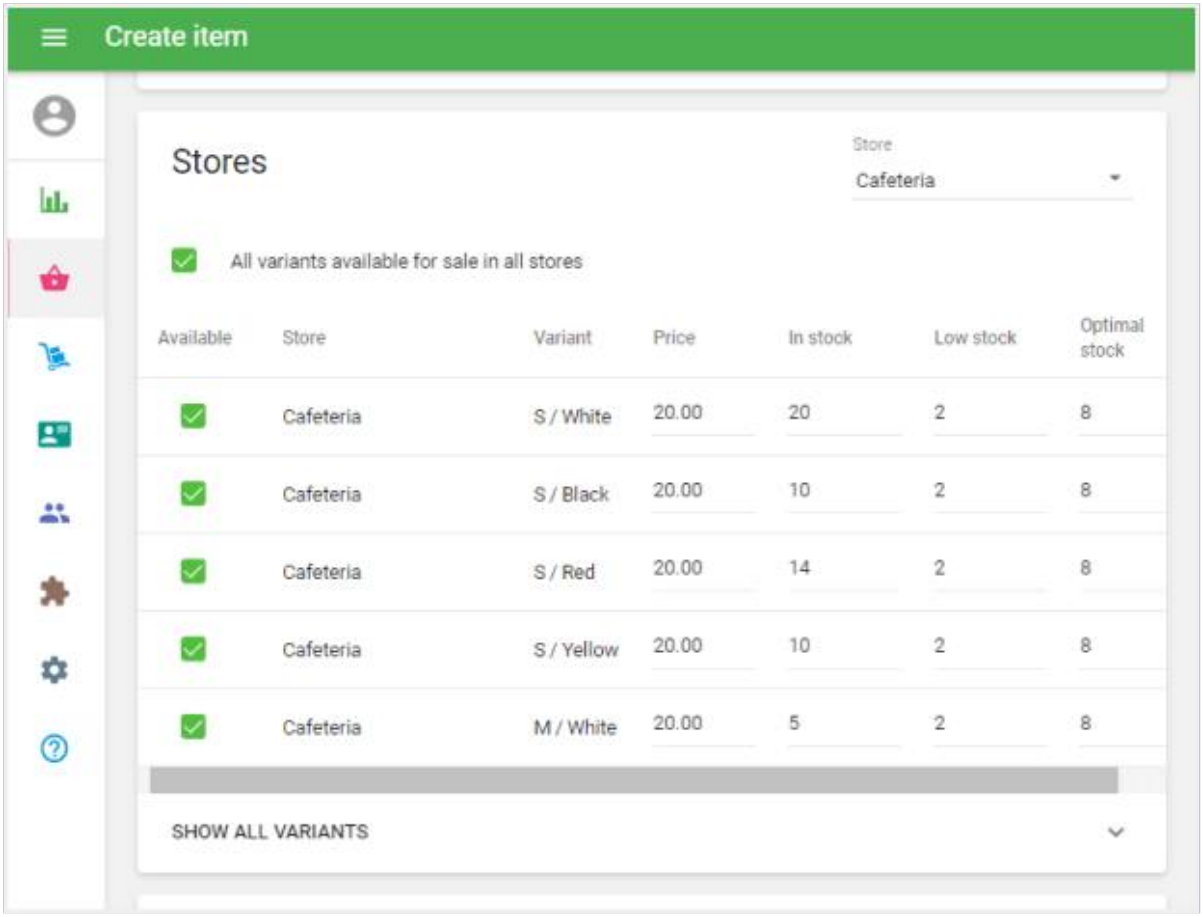
2. Editing Variant Details

Price and Cost: Automatically copied from the parent item, but can be adjusted individually for each variant.

SKU: Generated automatically, but you can assign your own unique SKU.

Barcode: You can add a barcode for each variant.

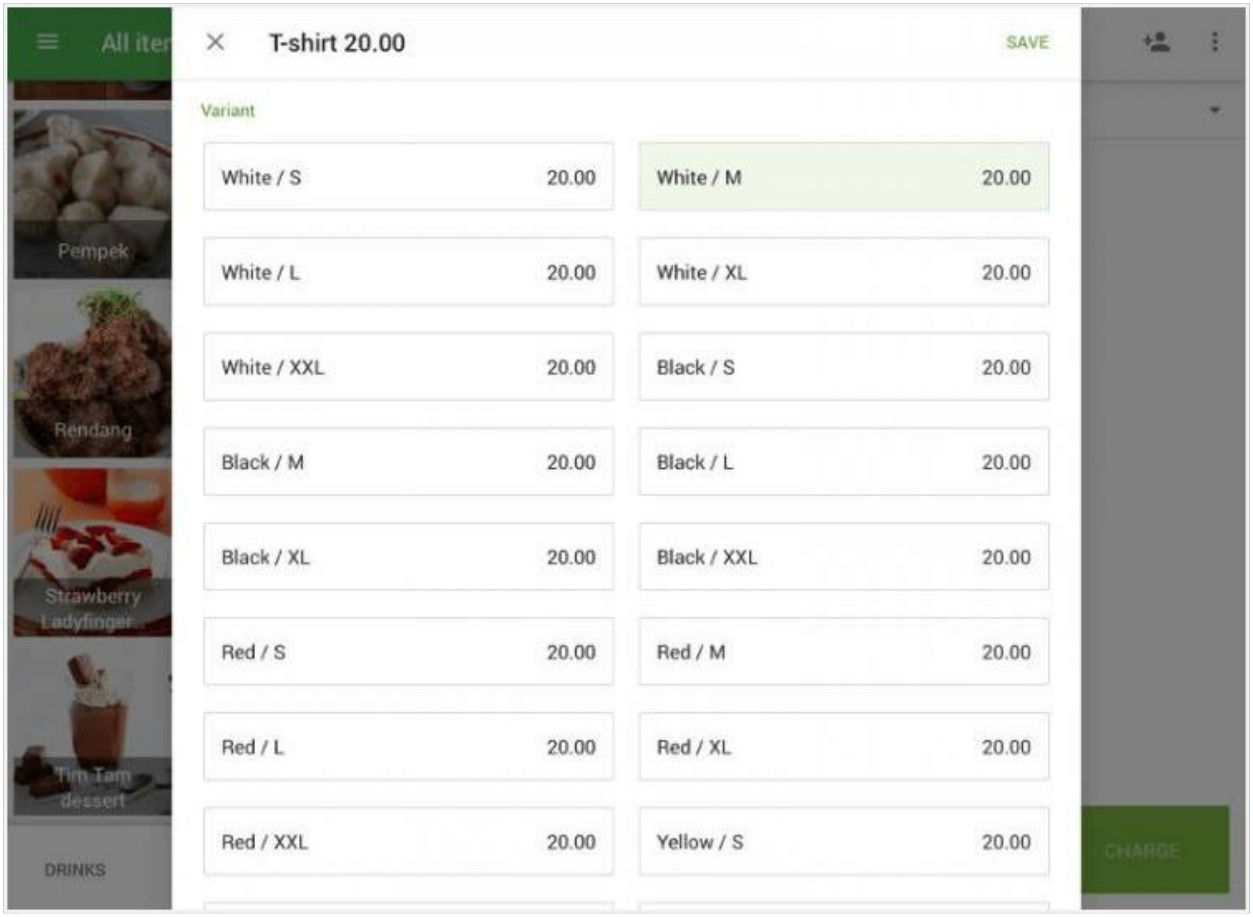
Multi-store settings: If you have multiple stores, you can set variant-specific **price, stock, and low stock alerts** for each store.



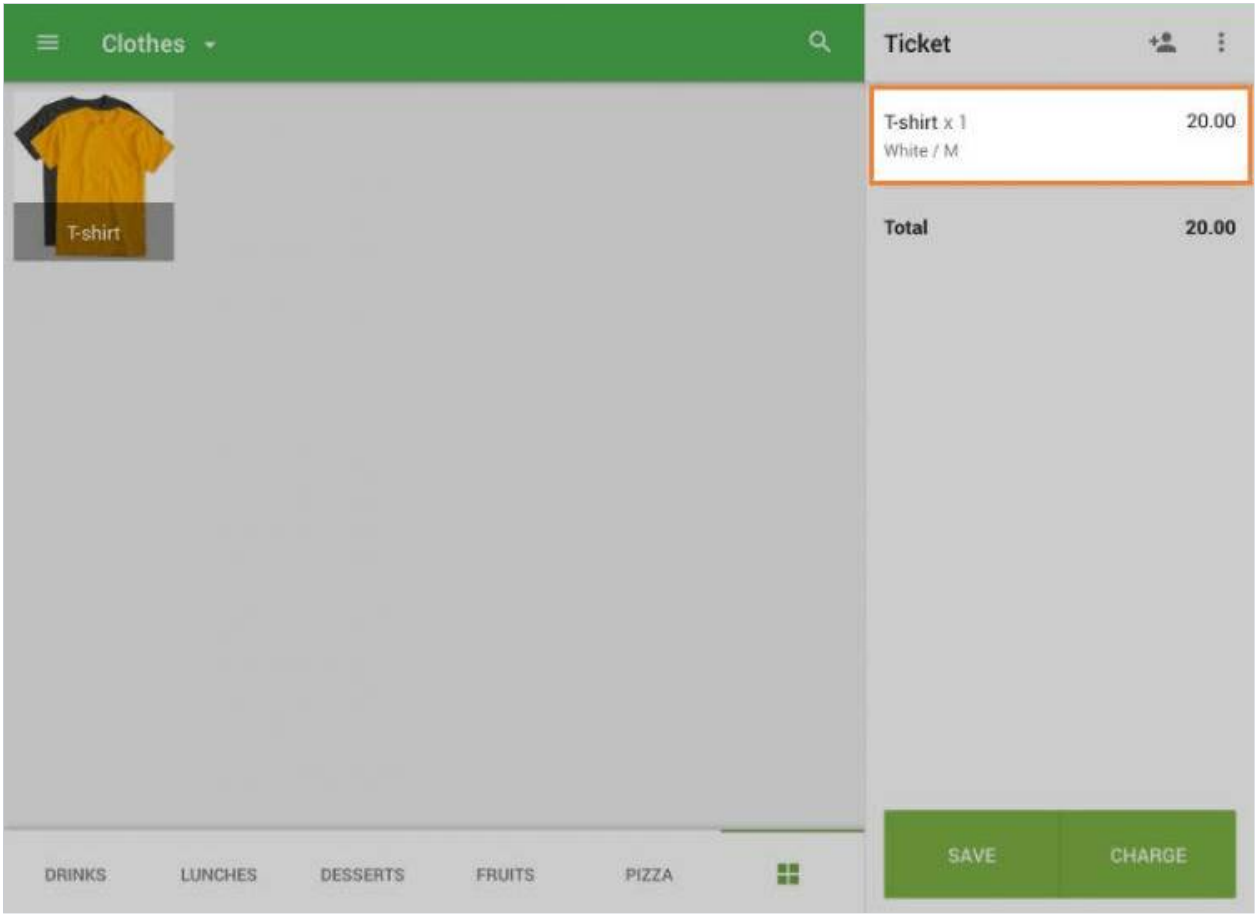
Don’t forget to save the item after making changes.

3. Variants in the POS and Reports

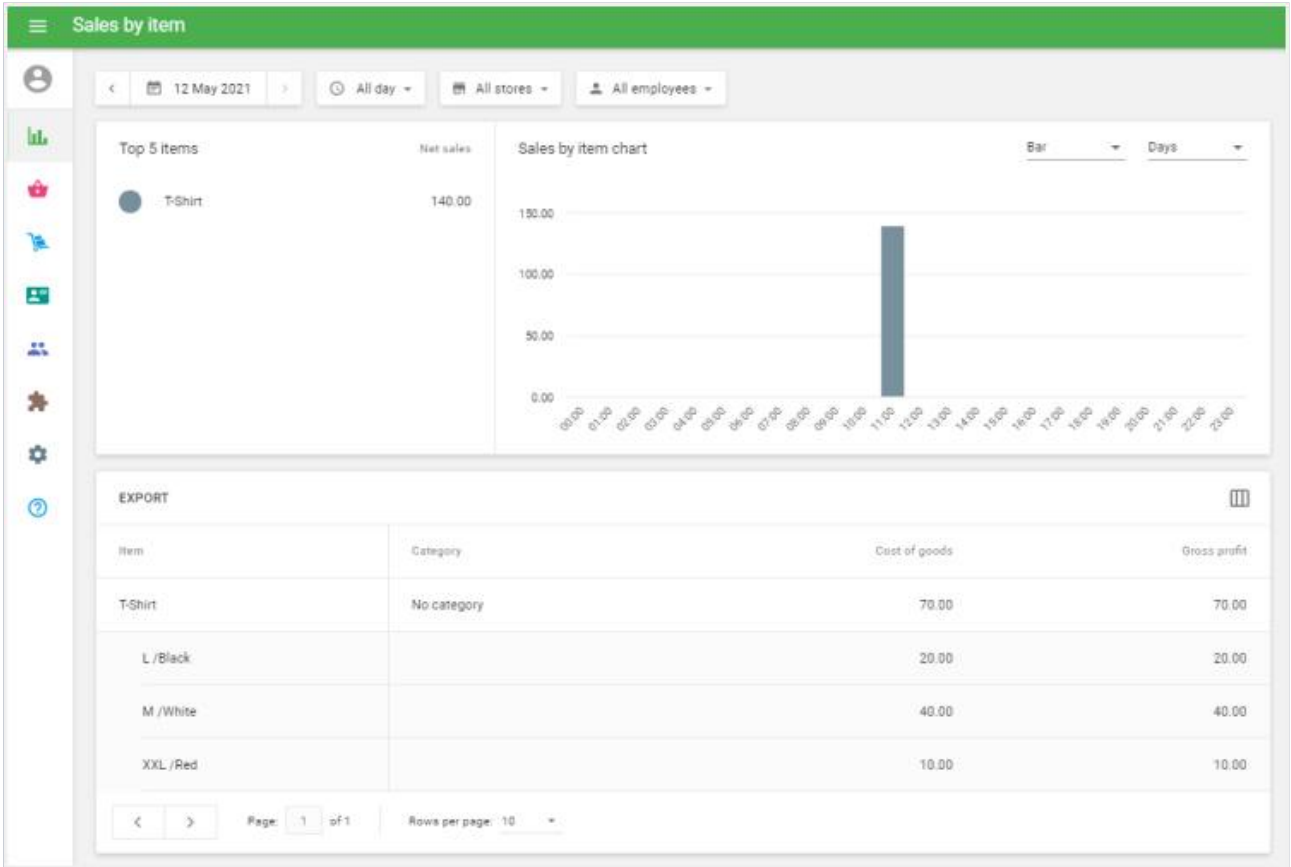
On the **POS app**, when you select an item with variants, a dialog will appear where you can choose the desired variant.



The selected variant will then be added to the ticket as a regular item.



In the **Back Office**, sales data for each variant can be viewed in **Reports → Sales by item**.



4. Importing and Exporting Variants

You can manage variants not only through the Back Office interface but also using **Import/Export** via CSV files.

Go to the **Item list** in the **Back Office**.

Use the **Export** button to download your items file.

Open the CSV file. You will see:

- Each **variant combination** is displayed as a separate item with its own SKU.

A	B	C	D	E	F	G	H	I	
Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name	Option 2 value	Opt
t-shirt	10017	T-shirt	Clothes	N	Color	White	Size	S	
t-shirt	10020					White		M	
t-shirt	10027					White		L	
t-shirt	10037					White		XL	
t-shirt	10038					White		XXL	
t-shirt	10039					Black		S	
t-shirt	10040					Black		M	
t-shirt	10041					Black		L	
t-shirt	10042					Black		XL	
t-shirt	10043					Black		XXL	
t-shirt	10044					Red		S	
t-shirt	10045					Red		M	
t-shirt	10046					Red		L	
t-shirt	10047					Red		XL	
t-shirt	10048					Red		XXL	
t-shirt	10049					Yellow		S	
t-shirt	10050					Yellow		M	
t-shirt	10051					Yellow		L	
t-shirt	10052					Yellow		XL	
t-shirt	10053					Yellow		XXL	
cap	10054	Cap	Clothes	N	Color	Black	Size	Big	Fat
cap	10055					Black		Big	
cap	10056					Black		Small	
cap	10057					Black		Small	
cap	10058					White		Big	
cap	10059					White		Big	
cap	10060					White		Small	
cap	10061					White		Small	

- A shared **Handle** field for all variants of the same item.
- Common fields are filled only for the first variant; the rest are left blank.

⚠ If you enter different values for shared fields across variants, the system will return an error on import.

Up to **3 Option name columns** and **3 Option value columns** are available. Leave unused ones blank.

When importing new items without variants, leave the **Handle** field blank, and the system will generate it automatically.

After editing, re-import the file into the Back Office.

Using Variants makes it easier to manage products with multiple versions and keeps your item list clear and organized.

See also:

Exporting and Importing Items

How to Create a Composite Item

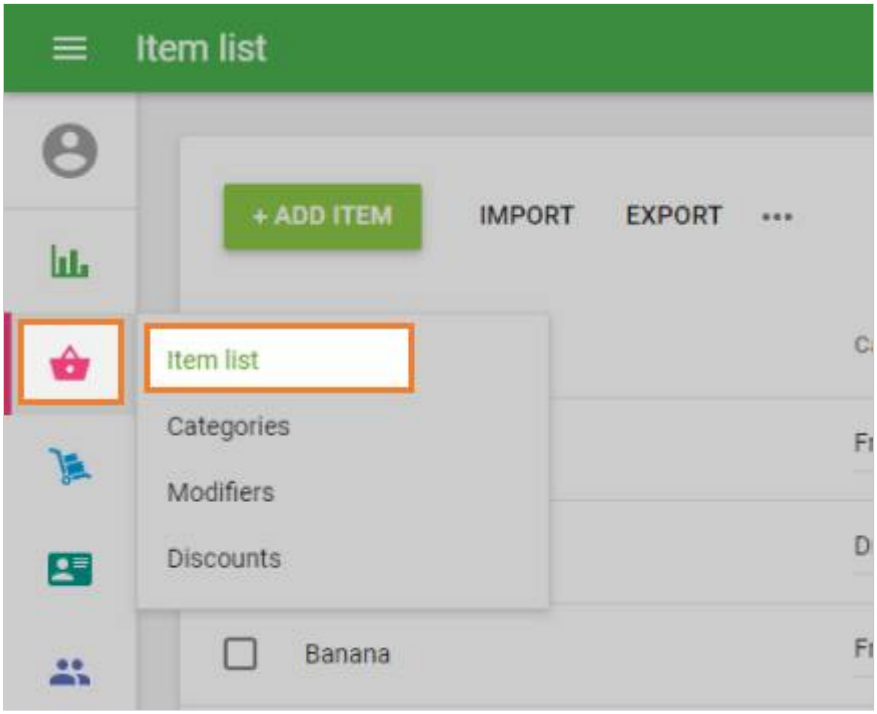
Video
https://www.youtube.com/watch?v=GHNB_oisX4s

A **Composite item** is an item that consists of multiple individual items bundled together. It allows businesses to create new items from existing components or sell a combination of items as a single unit while managing the inventory of each component separately. Composite items can also be used together with the **Production** option to automate inventory changes during the manufacturing process.
This feature is useful for businesses that sell item bundles, meal sets, gift boxes, or any product assembled from several components.

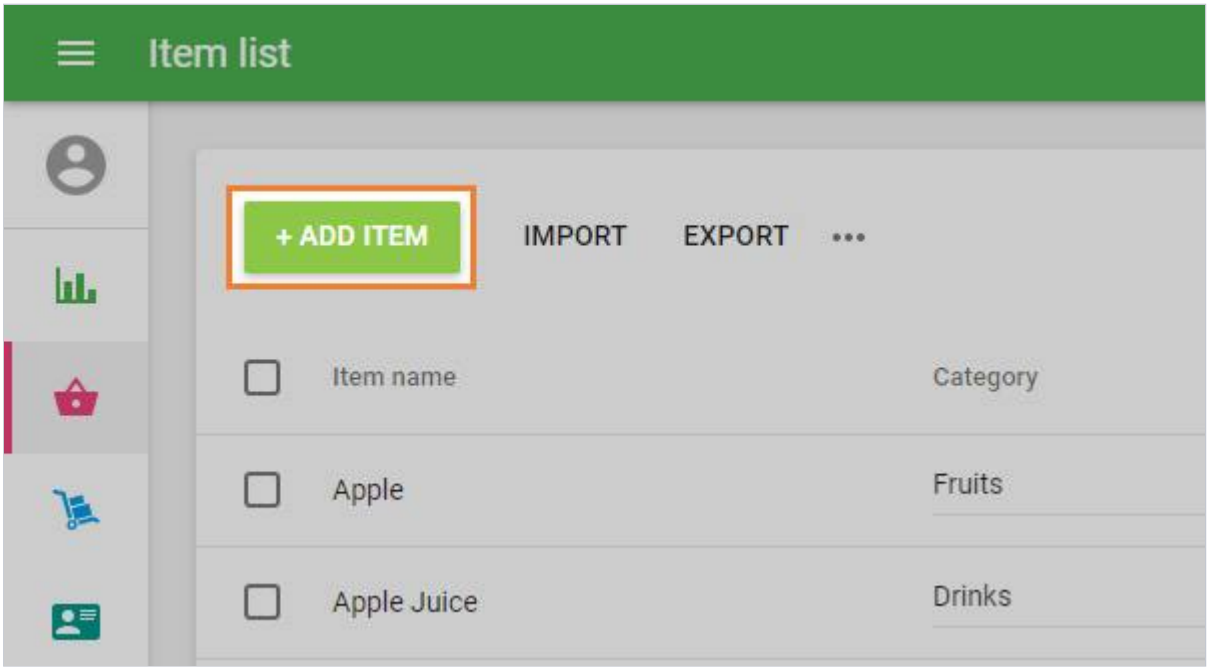
1. Create Component Items

Before creating a composite item, you need to set up all the items that will serve as its **components**.

In the **Back Office**, go to the **Item list**.

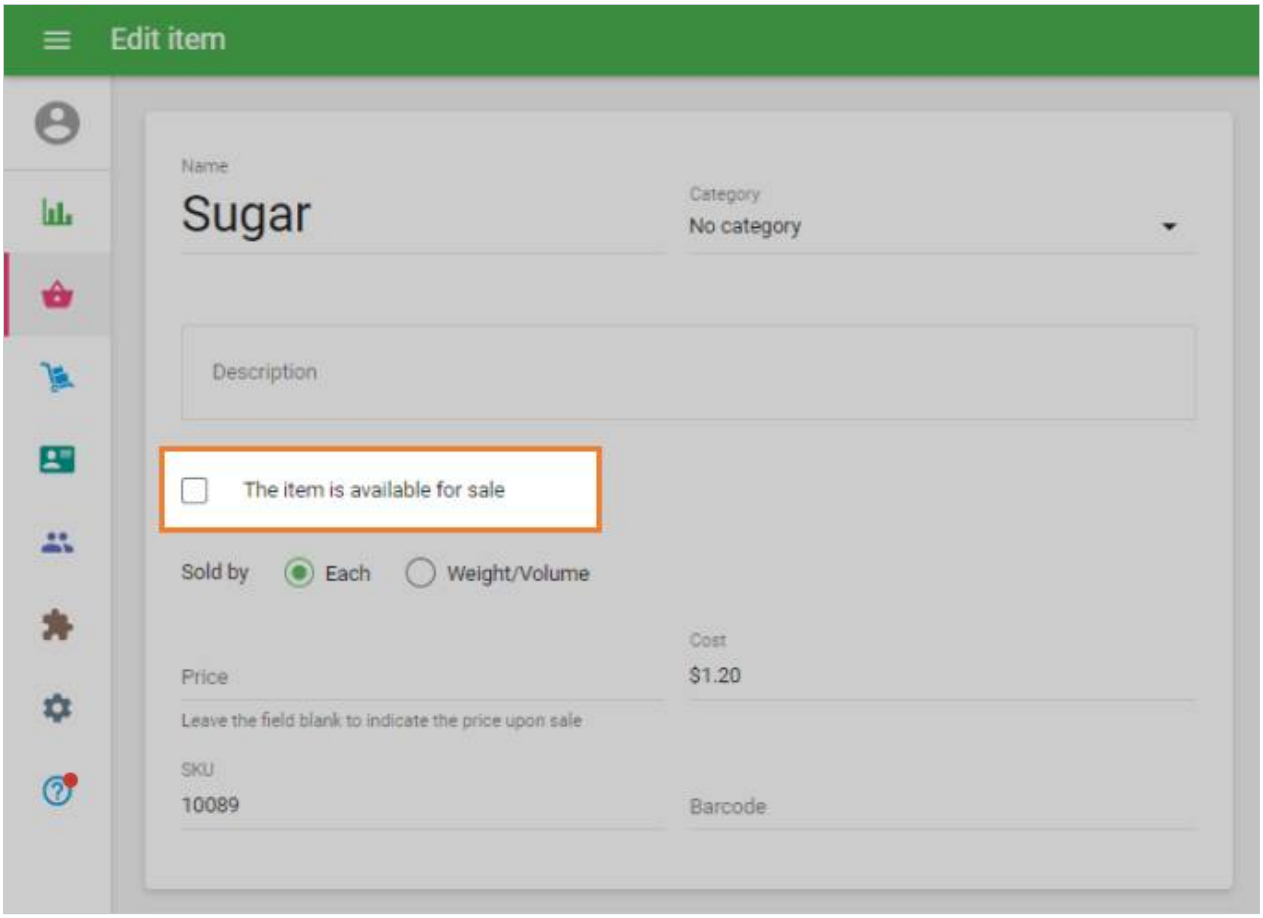


Click the **Add Item** button.



Enter the item **Name** and other necessary details.

If a component is **not sold separately**, deselect the checkbox "**The item is available for sale**."



- This ensures the component doesn't appear in the sales screen on POS.

Fill in the **Cost** field.

(Optional) Enable **Track stock** if you want the system to automatically reduce the stock of this component when a composite item containing it is sold.

Click **Save**.

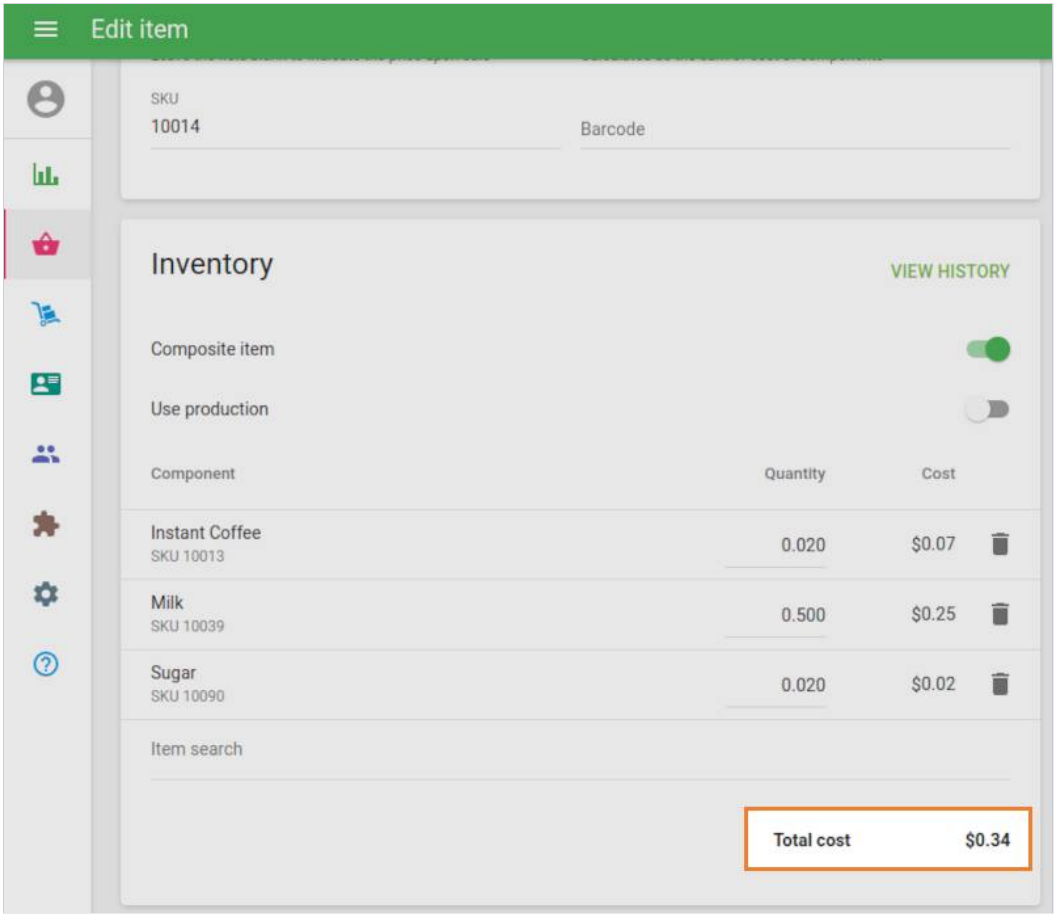
Repeat these steps for each component item you plan to include in your composite item.

2. Create the Composite Item

Once all components are ready:

1. In the **Item list**, click **Add Item** again to create a new item.
2. In the **Inventory** section, switch on the **Composite item** option.
3. In the **Component** block, add components one by one, by searching for them in the items list.
4. Specify the **Quantity** of each component that makes up one unit of the composite item.

Tip: The system automatically calculates the **total cost** of the composite item based on the cost and quantity of its components.



3. Complete and Save

- Fill in all remaining item details as usual (price, category, image, taxes, etc.).
- Click **Save** to create your composite item.

Now, every time you sell this composite item, the stock quantities of all its components will automatically decrease according to the specified quantities.

Notes

- The **maximum nesting level** for composite items is **3**.

For example: Composite item → Component → Sub-component → Sub-sub-component (limit reached).

- If an item already reaches the third nesting level, it will not appear in the drop-down list when selecting components.

Result: You've successfully created a composite item. Selling this item will now automatically adjust the stock levels of all its component parts, keeping your inventory accurate and up to date.

See also:

How to Add Items and Categories

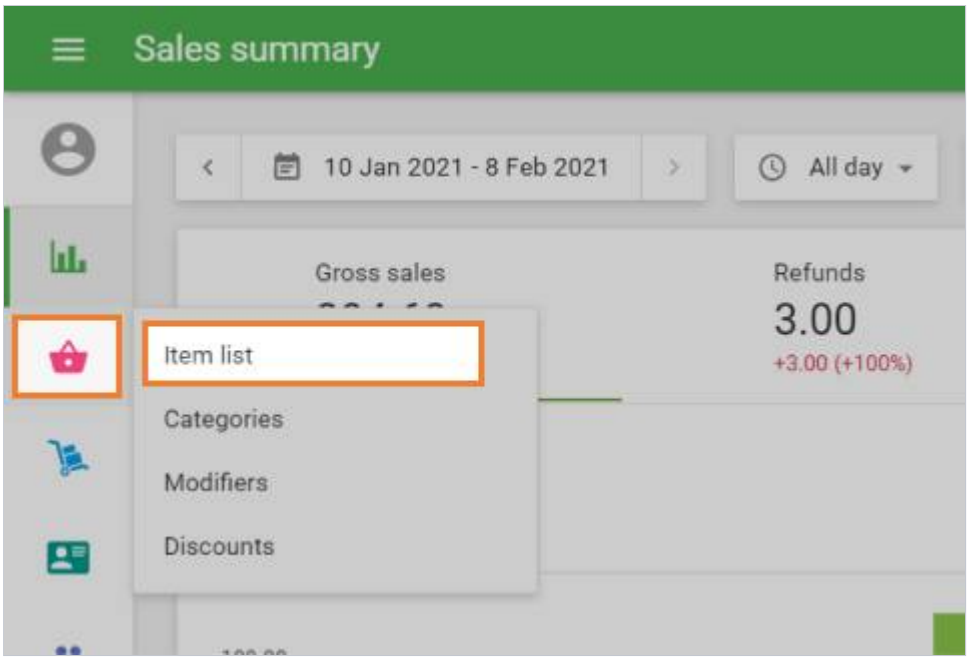
Exporting and Importing Items

Video
https://www.youtube.com/watch?v=5C5mQaRbLgc

It is easy to create items by adding them in the Back Office. But you can also import them through a CSV file at the Back Office.

To import your items smoothly and quickly, the correct sheet should be prepared. You can download the template, but the best way is to create sample items in the 'Item list', export them as a CSV file, and add all the rest of the items to the sheet.

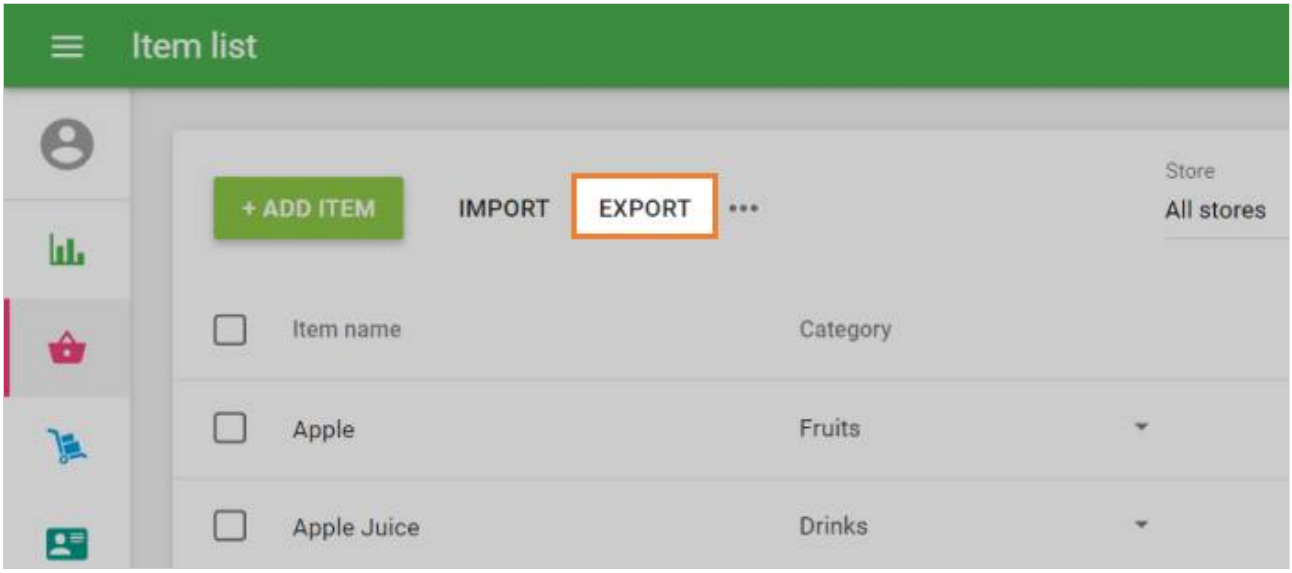
Let's start by adding a few sample items in the Back Office. Open 'Item list'.



Add the types of items that you are going to use in your store: composite items, items with variants, or just ordinary items. Fill in the parameters you are going to use with your items: track stock, in stock, low stock notification, price, cost, etc.

Add categories, modifiers, and taxes and apply them to your items. If you have several stores, do not forget to add these stores in the Back Office and set the item's availability for each store.

When you have a list of sample items, you can **export** them. Click on the 'Export' button.



Open your CSV file (the best way is to open it from Google Sheets, but you can also use other tools). You will see the sheet with your sample items. You can use it to add other items you intend to import. Follow the pattern of your sample items when filling in the fields.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name	Option 2 value	Option 3 name	Option 3 value	Cost	Barcode
2	apple-juice	1001	Apple Juice	Drinks	N							1.44	10544566251001
3	banana	1018	Banana	Fruits	N							12.12	LVR sde 9012
4	beef-and-chicken-satay	10021	Beef and Chicken Satay	Meals	N							9	
5	beer	10018	Beer	Drinks	Y							5	
6	beer-glass	10019	Beer glass	Drinks	Y							3.5	
7	beer-glass-0.5-l	10010	Beer glass 0.5 L	Drinks	N								SDA-sku-3456
8	black-tea	1014	Black Tea	Hot Drinks	N								10544566251014
9													
10	cake	1019	Cake	Sweets	N							1.61	10544566251019
11	cap	10054	Cap	Clothes	N	Color	Black	Size	Big	Fabric	Cotton	5	
12	cap	10055					Black		Big		Silk	5	
13	cap	10056					Black		Small		Cotton	5	
14	cap	10057					Black		Small		Silk	5	
15	cap	10058					White		Big		Cotton	5	
16	cap	10059					White		Big		Silk	5	
17	cap	10060					White		Small		Cotton	5	
18	cap	10061					White		Small		Silk	5	
19	capuccino	10000	Capuccino	Hot Drinks	N							1	7622210266772
20	carrot-fresh	1002	Carrot Fresh	Juice	N							0	10544566251002
21	cashew-nuts	10009	Cashew nuts	Fruits	Y							0	
22	cheesecake	10015	Cheesecake	Sweets	N							4.29	
23	chicken-caesar-salad	10008	Chicken Caesar Salad	Salads	N							5.3	
24	classic-cobb-salad	10006	Classic Cobb Salad	Salads	N							4.12	
25	coffee	10014	Coffee	Drinks	N							2	
26	coffee-200ml	10016	Coffee 200ml	Drinks	N								
27													
28													
29	cookies	1021	Cookies	Sweets	N							0.75	10544566251021
30	croissant	1011	Croissant	Sweets	N							1.4	10544566251011
31	dadiah	10036	Dadiah	Drinks	N							0	3245675991140
32	fancy-cake	1020	Fancy Cake	Sweets	N							2	10544566251020
33	four-cheese-pizza	10003	Four Cheese Pizza	Pizza	N							2.2	1012345678912
34	fried-rice	10024	Fried rice	Meals	N							0	
35	fruit-salad	1005	Fruit Salad	Fruits	N							3.72	10544566251005
36	gado-gado	10025	Gado-gado	Meals	N							0	
37	green-apple	1016	Green Apple	Fruits	N							0.5	10544566251016
38	green-tea	1013	Green Tea	Hot Drinks	N							0.36	10544566251013
39	harvest-salad	10007	Harvest Salad	Salads	N							3.9	
40	hearty-oxtail-soup	10035	Hearty oxtail soup	Meals	N							0	
41	instant-coffee	10013	Instant Coffee		N							3.5	
42	krupuk	10028	Krupuk	Meals	N							0	

Note: CSV (comma-separated values) format is where the fields are separated by commas, so avoid commas in your data.
For fields with money value, such as 'Price' and 'Cost', use only numbers - no currency symbols. The decimal separator must be a point.

Features of different types of items

There are some specific points you have to pay attention to when adding data for each type of item: ordinary items, composite items, items with variants, and multi-stores.

Ordinary items

	A	B	C	D	E	F	G	H
1	Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 nar
2	apple-juice	1001	Apple Juice	Drinks	N			
3	banana	1018	Banana	Fruits	N			
4	beef-and-chicken-satay	10021	Beef and Chicken Satay	Meals	N			
5	black-tea	1014	Black Tea	Hot Drinks	N			
6	capuccino	10000	Capuccino	Hot Drinks	N			
7	carrot-fresh	1002	Carrot Fresh	Juice	N			
8	cashew-nuts	10009	Cashew nuts	Fruits	Y			
9	cheesecake	10015	Cheesecake	Sweets	N			
10	chicken-caesar-salad	10008	Chicken Caesar Salad	Salads	N			
11	classic-cobb-salad	10006	Classic Cobb Salad	Salads	N			
12	coffee	10014	Coffee	Drinks	N			
13	coffee-200ml	10016	Coffee 200ml	Drinks	N			

Ordinary items - items that are not composite and do not have variants.
For items without variants, it is better to leave the ‘Handle’ field blank in the importing file. In this case, the system will automatically generate unique handles for the new items.

‘SKU’ is an obligatory field and should be unique for each item. The ‘Name’ is also an obligatory field.

Also, leave the columns of ‘Option name’ and ‘Option value’ blank because they are for variants of items.

Leave the column ‘SKU of included item’ blank because it is only for composite items.

Multiple stores

In case of you have multiple stores, you will have the following columns for each store: Available for sale, Price, In stock, and Low stock. Each of the 4 columns will have the store's name in brackets next to it. For example, Available for sale [The Coffee] and Available for sale [Store 2]. So, you can set the values of these parameters for each of your stores.

	Q	R	S	T	U	V	W	X	Y
em	Track stock	Available for sale [The Coffee]	Price [The Coffee]	In stock [The Coffee]	Low stock [The Coffee]	Available for sale [Store 2]	Price [Store 2]	In stock [Store 2]	Low stock [Store 2]
	Y	N	2.29	21	2	N	2.29	10	2
	Y	Y	2.19	67	4	Y	2.19	15	4
	Y	Y	12.03	48	4	Y	12.03	17	4
	N	Y	5.3			Y	5.3		
	Y	Y	8	8	5	Y	8	16	5
	Y	N	15	12	0	N	15	14	0
	Y	Y	7	57	5	Y	7	65	5
	Y	Y	14	14		Y	14	55	
	N	Y	7.59			Y	7.59		
	N	Y	4			Y	4		
0.02		Y	2			Y	2		

Items with variants

Handle	SKU	Name	Category	Sold by weight	Option 1 name	Option 1 value	Option 2 name	Option 2 value	Option 3 name	Option 3 value	Cost	Barc
t-shirt	10017	T-shirt	Clothes	N	Color	White	Size	S			10	
t-shirt	10020					White		M			10	
t-shirt	10027					White		L			10	
t-shirt	10037					White		XL			10	
t-shirt	10038					White		XXL			10	
t-shirt	10039					Black		S			10	
t-shirt	10040					Black		M			10	
t-shirt	10041					Black		L			10	
t-shirt	10042					Black		XL			10	
t-shirt	10043					Black		XXL			10	
t-shirt	10044					Red		S			10	
t-shirt	10045					Red		M			10	
t-shirt	10046					Red		L			10	
t-shirt	10047					Red		XL			10	
t-shirt	10048					Red		XXL			10	
t-shirt	10049					Yellow		S			10	
t-shirt	10050					Yellow		M			10	
t-shirt	10051					Yellow		L			10	
t-shirt	10052					Yellow		XL			10	
t-shirt	10053					Yellow		XXL			10	
cap	10054	Cap	Clothes	N	Color	Black	Size	Big	Fabric	Cotton	5	
cap	10055					Black		Big		Silk	5	
cap	10056					Black		Small		Cotton	5	
cap	10057					Black		Small		Silk	5	
cap	10058					White		Big		Cotton	5	
cap	10059					White		Big		Silk	5	
cap	10060					White		Small		Cotton	5	
cap	10061					White		Small		Silk	5	

You can see that each combination of a variant in the export file is displayed as a separate item with its own SKU. Follow this pattern as a guideline for your items with variants.
The ‘Handle’ field is required for items with variants and it should be the same for all variants of the same item.

Only the fields of the first item with variants have values. The fields that are common to all variants of the same item are left blank. You may also fill them with the same value, but if they have a different value, you will get an error message when importing.

There are three columns each for ‘Option name’ and ‘Option value’. If some products have less than 3 options of variants, the extra fields are left blank.

Composite items

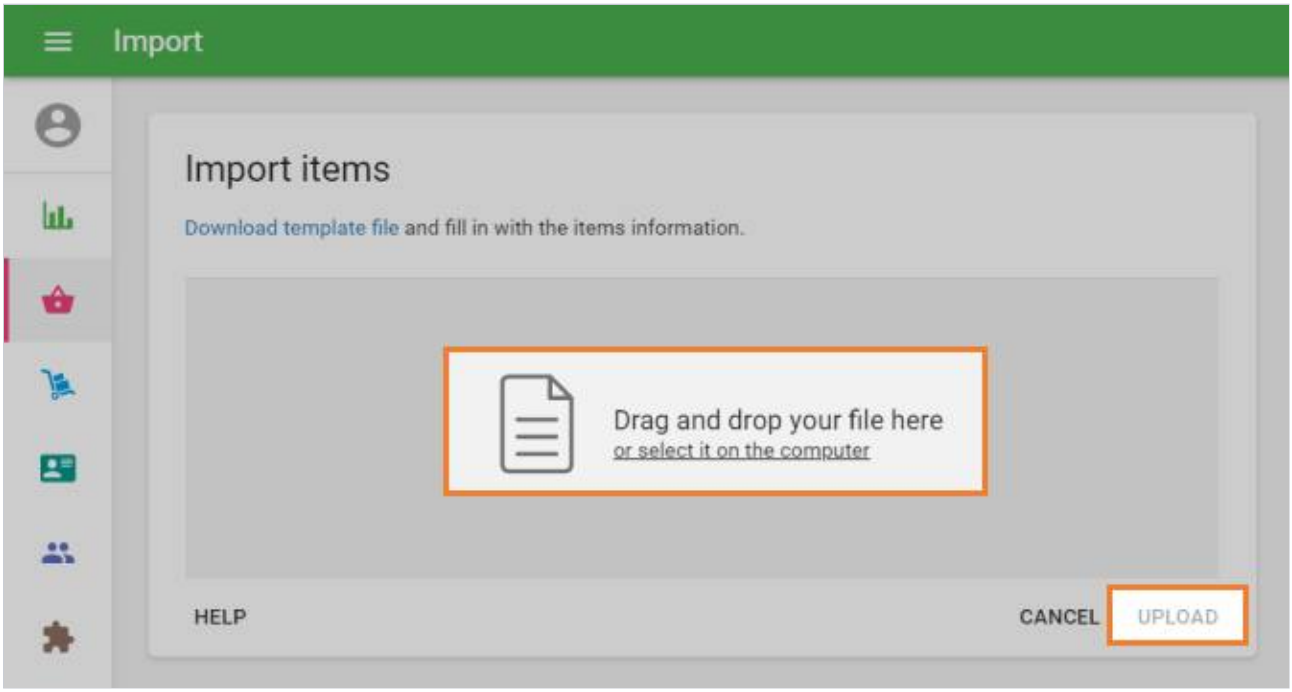
Each composite item includes several components. Specify SKU codes of all the included items (components) of the selected composite item in the field ‘SKU of included item’ on a separate row.
‘Quantity of included item’ - in this field, it's necessary to specify the quantity of the component that is included in one unit of the composite item.
You cannot track the stock of composite items, so leave the fields that are related to stocks blank. Also, leave all the other fields of components blank except for the first row.

Import of items

Click on the ‘Import’ button.



In the IMPORT menu, choose your CSV file from your computer and click ‘Upload’.



If you filled in the table without errors, you will be directed to an import confirmation window. There, you will see information on how many items and categories will be created or edited. Click 'CONFIRM IMPORT'.

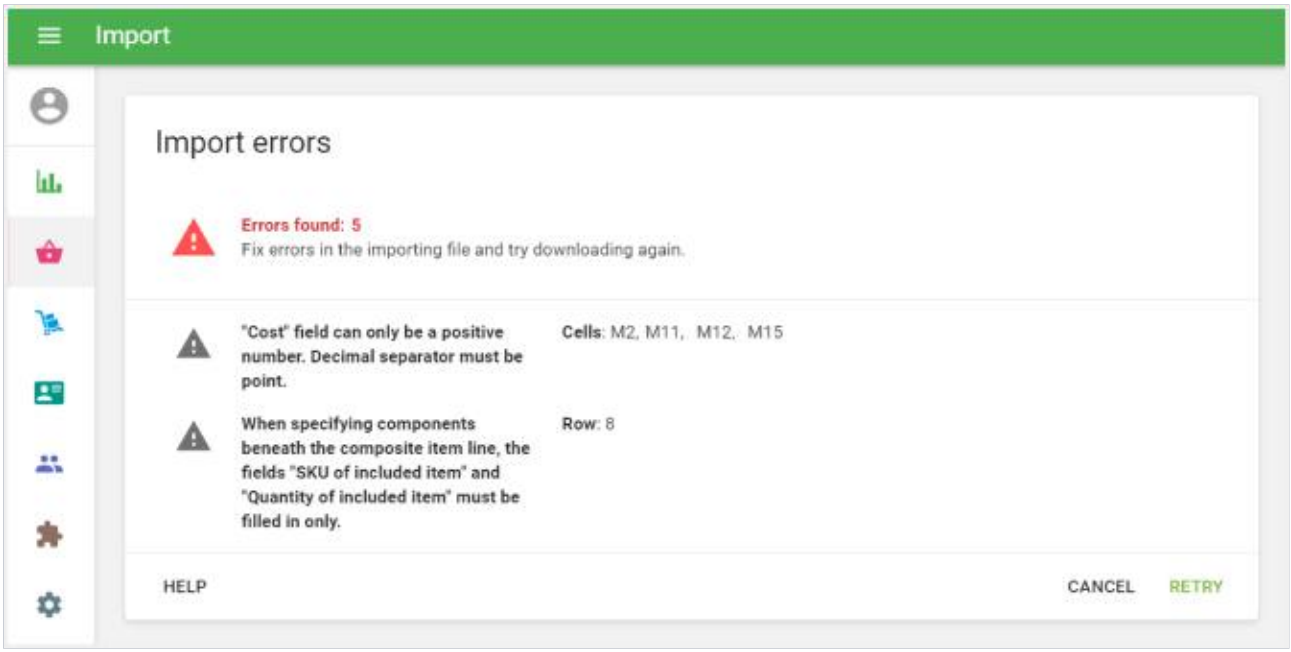
You will see a notification message that the list of items has been successfully updated. Click 'OK' and continue your work.

Import errors
You may be faced with some errors when uploading the completed file. An error message will appear if:

- You changed the file format so that the file you are trying to upload is no longer in CSV format.
- The size of your file exceeds the admissible 5 MB.
- You edited the names of columns that should have been left unedited.
- You have more than 10,000 items saved in your file.

In the next stage, you may be faced with import errors. In this case, the window with the corresponding message will open.

The critical errors are marked with a red sign. Each error has its explanation message and the place of the error: row, column, and cell. Fix all critical errors in the file and try to import the file again.
Warning messages have yellow signs. They are just for your information, and they will not stop your file from being imported.



The meaning of columns

Handle
A handle is an item identifier, which should be unique for each item. The ‘Handle’ field should be the same for all variants of the same item.

SKU
SKU (Stock Keeping Unit) is a unique code given to each of your items. Specify and fill in each field individually. We recommend using the format '10001', '10002'... etc. but the key point is that no numbers are repeated. One last condition is that the SKU should not exceed 40 characters.

Name
Fill in the names of each imported item in this field. You can use letters, digits, spaces, and any special symbols, as long as you use no more than 64 total characters.

Category
A category is a group to which an item belongs. For example, if you create the items 'Cherries', 'Apples', and 'Oranges', then you can put them into the 'Fruits' category.

Description
The description field is used primarily for e-commerce and online ordering services connected

with Loyverse.
Searching for an item in the Loyverse POS app by text from the Description field is impossible. This field can also be extracted through Loyverse API.

Cost
Cost is the amount of money you paid to purchase the item. Here, specify the cost of the items only using digits - no currency symbols. Do not fill in the cost field for composite items. This will be calculated automatically as a sum of costs for each individual component.

Price
In this field, fill in the price at which you plan to sell the items. As with the 'Cost' field, enter only digits without currency symbols. If you want to specify the item price during a sale, leave this field empty.

Default price
This is the default price that is assigned to all stores. But then it can be changed for some stores if some stores have a different price.
If you have the same price in all stores - you can only fill in the Default price column in the CSV file - after import, the same price will automatically be in all stores. And if prices are different in stores, then you need to specify in the CSV file the price for each store.
As with the 'Cost' field, enter only digits without currency symbols. If you want to specify the item price during a sale, leave this field empty.

Available for sale
Here, it's only necessary to specify one character: 'Y' (Yes) – if the item is available for sale, or 'N' (No) – if it is not available.
It is important to note that if you ignore this field, then the item will be available for sale by default.

Sold by weight
If the item is sold by weight, enter 'Y' in the field, and if not, enter 'N'. Again, if you do not fill in this field, the item will be sold by piece as default.

Option 1, 2, 3 name
These fields are for option names of the variants. Leave them blank for items without variants.

Option 1, 2, 3 value
These fields are for option values of the variants. Leave them blank for items without variants.

Barcode
If a barcode is available, then fill in this field with the item's barcode digits.

SKU of included item
Each composite item includes several components. Specify the SKU codes of all the included items (components) of the selected composite item here. Leave blank for non-composite items.

Quantity of included item
In this field, it's necessary to specify the quantity of the component that is included in one unit of the composite item. For example, for one portion of the composite item 'Americano with milk', you use 0.1L of the item 'Milk'. This means you should fill in the value 0.1 in the 'Quantity of included item' field nearby 'Milk'.

Use production
Here, it's only necessary to specify one character: 'Y' (Yes) – if the composite item has a production option on, or 'N' (No) – if it is off. Note, that production can be applied only for composite items and only when using the functionality of Advanced inventory.

Supplier
The primary supplier name for Purchase Orders in case of using the functionality of Advanced inventory.

Purchase cost
The cost of items that will be used by default in case of autofilling purchase orders in case of using the functionality of Advanced inventory.

Track stock
If you would like to track the inventory of a selected item, enter 'Y' in the field and if not, enter 'N'. If you leave this field empty, then it will not track the inventory of that item.

In stock
If you would like to track inventory, then fill in an item's current quantity in this field, again only using digits. To avoid confusion with units (e.g., weight), we advise specifying them in brackets nearby the item name in the 'Name' field. For example, if you have 100 kg of potato in stock, then write 'Potato (kg)' in the 'Name' field and ‘100' under 'in stock'.
If you have selected the option 'Track stock', but did not specify a quantity, then the unit will automatically be zero.

Low stock
In this field, enter the quantity at which you would like to be notified about the low stock. Notification of low stock of an item or its complete absence will be sent to the owner’s email at 10:00 A.M. in the time zone that you have specified. If there are no items with low stock, no notification will be sent to you.

Modifier - "Name of modifier"
Here, it's only necessary to specify one character: 'Y' (Yes) – if the item has a modifier, or 'N' (No) – if it is not available.

Tax - "Name of tax"
Here, it's only necessary to specify one character: 'Y' (Yes) – if the tax is applied to this item or 'N' (No) – if it is not applied.

See also:

[How to Add Items in the Loyverse Back Office]

[How to Create and Manage Multiple Stores under One Account]

[How to Open CSV File in Google Sheets]

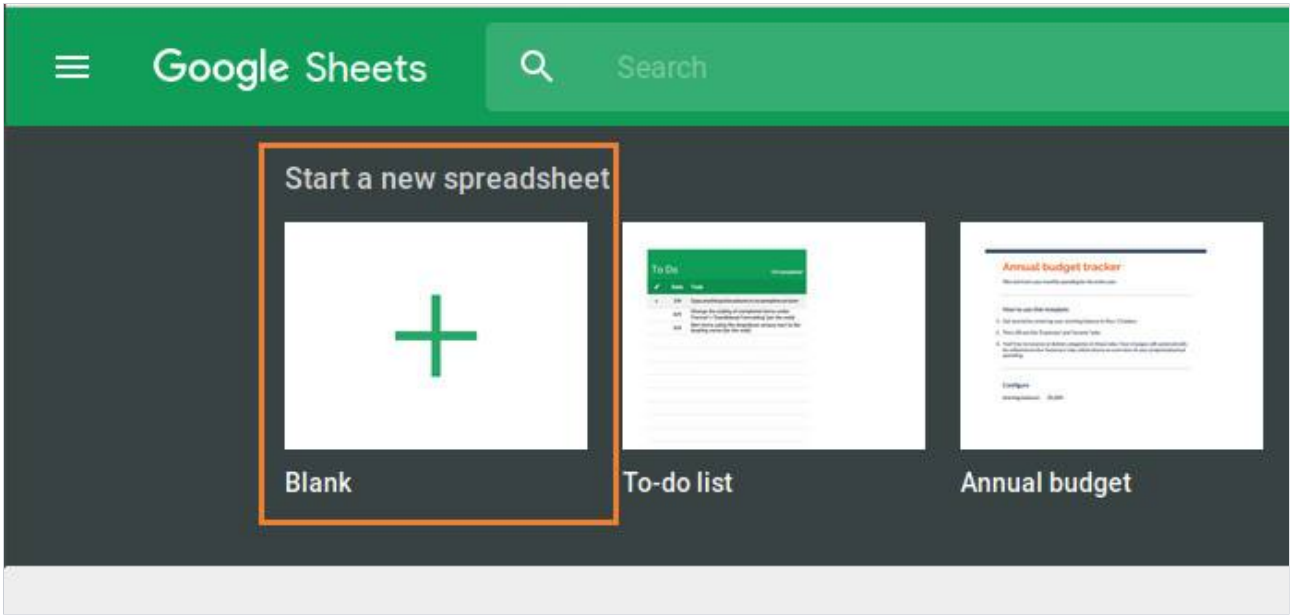
How to Open CSV File in Google Sheets

CSV files are commonly used in the Loyverse Back Office to export reports and to import or export items and customers. You can easily open and edit these files using Google Sheets.

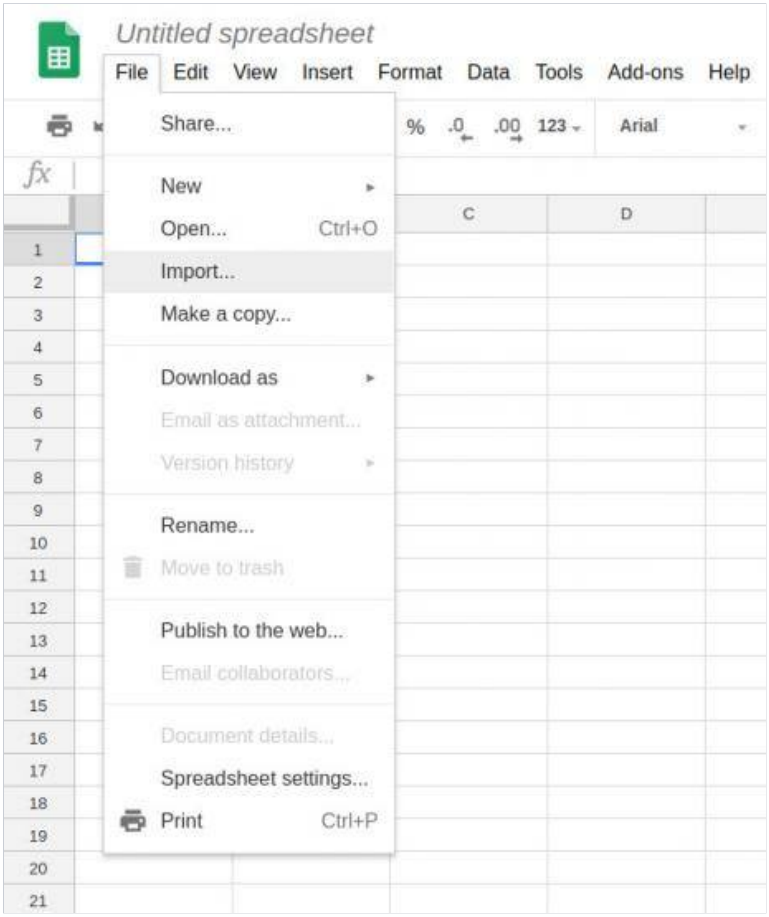
Opening a CSV File in Google Sheets

Go to **Google Sheets**.

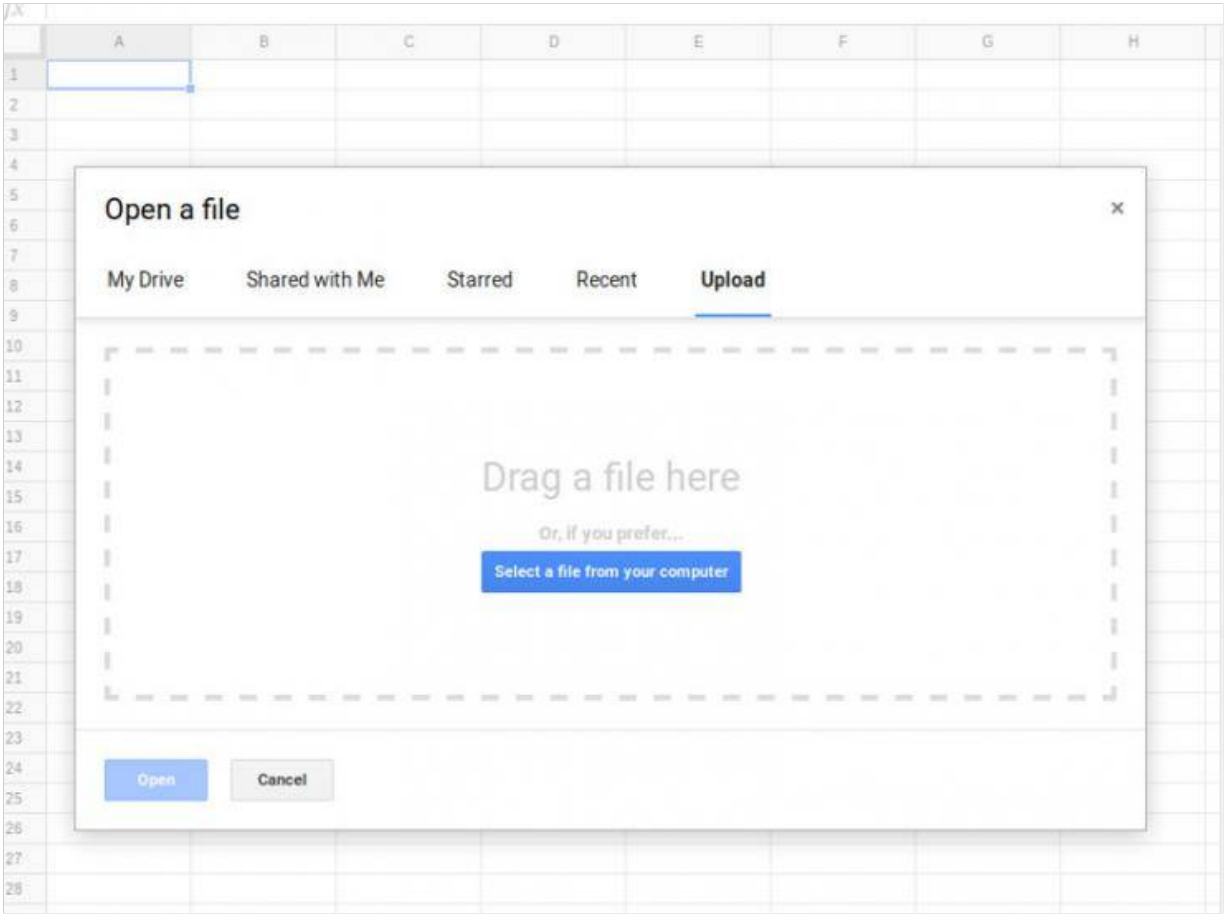
Click **Start a new spreadsheet**.



Open the **File** menu and select **Import**.



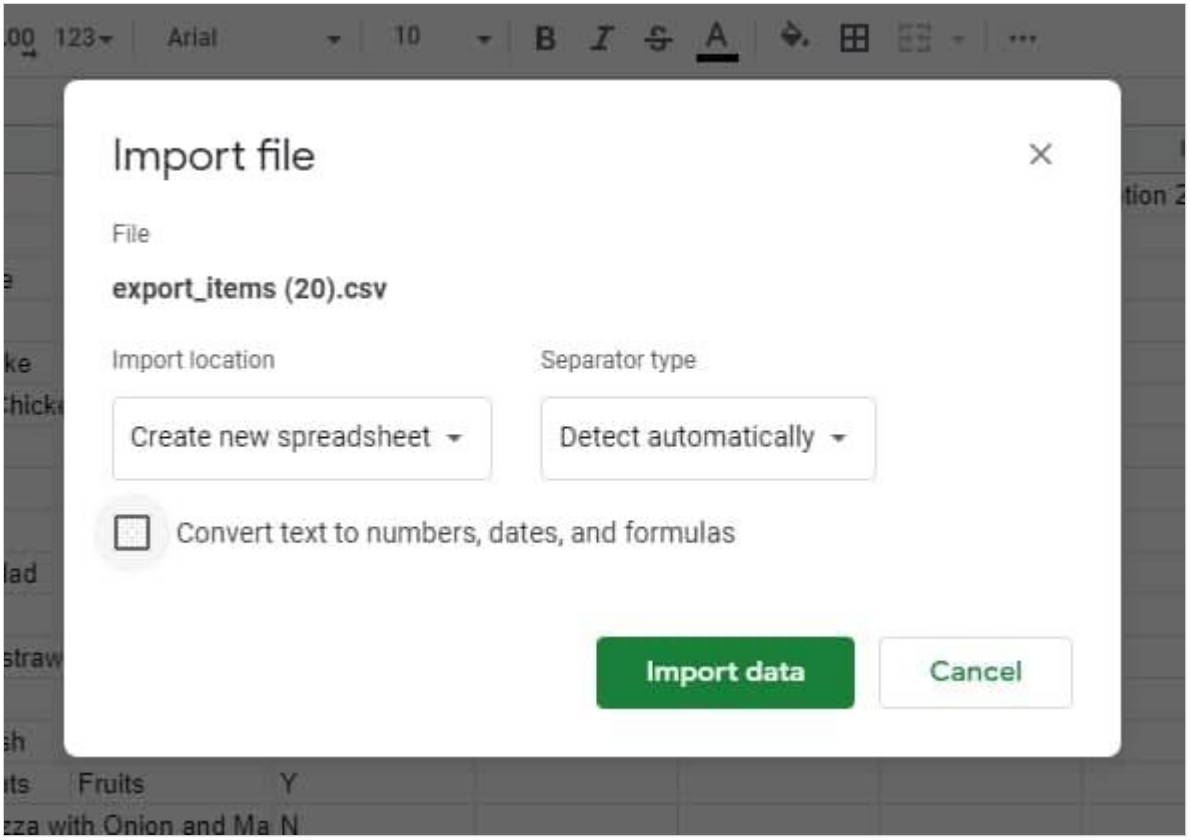
In the **Open a file** window, switch to the **Upload** tab.



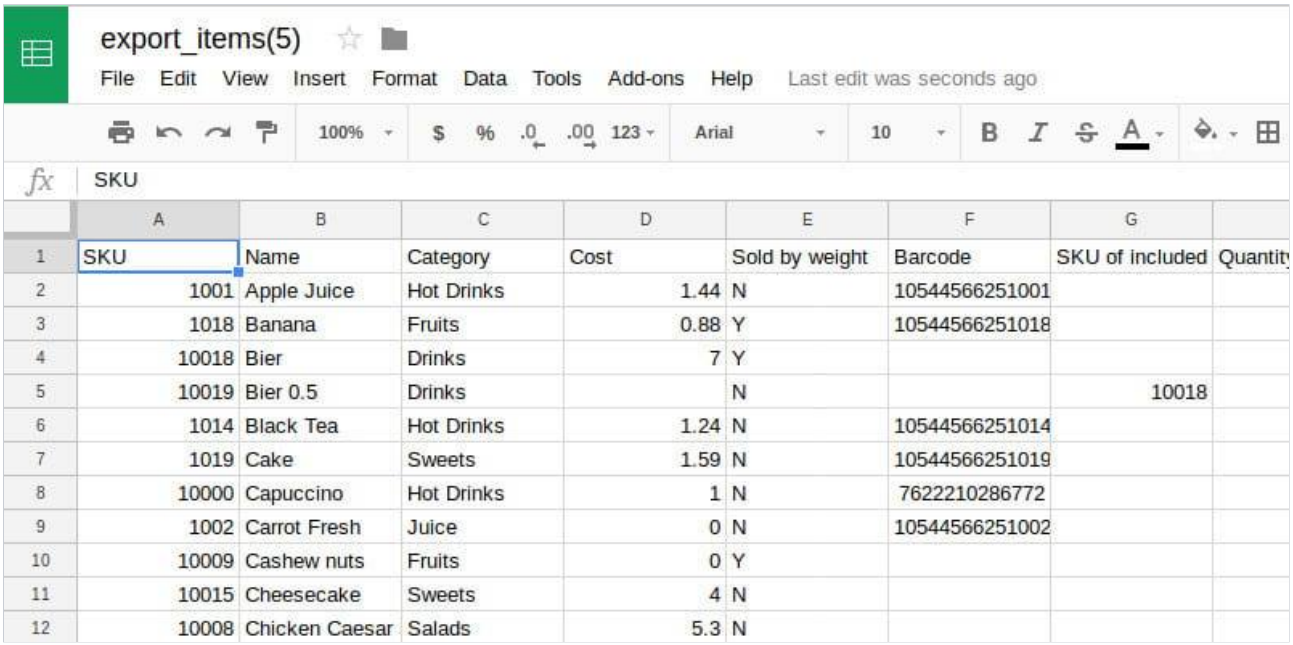
Upload your CSV file by selecting it from your computer or dragging and dropping it into the window.

In the **Import file** settings window:

- **Uncheck** the option **Convert text to numbers, dates, and formulas**.
- Click **Import data**.



Your CSV file will now open as a table in Google Sheets.



	A	B	C	D	E	F	G	
1	SKU	Name	Category	Cost	Sold by weight	Barcode	SKU of included	Quantity
2	1001	Apple Juice	Hot Drinks	1.44	N	10544566251001		
3	1018	Banana	Fruits	0.88	Y	10544566251018		
4	10018	Bier	Drinks	7	Y			
5	10019	Bier 0.5	Drinks		N		10018	
6	1014	Black Tea	Hot Drinks	1.24	N	10544566251014		
7	1019	Cake	Sweets	1.59	N	10544566251019		
8	10000	Capuccino	Hot Drinks	1	N	7622210286772		
9	1002	Carrot Fresh	Juice	0	N	10544566251002		
10	10009	Cashew nuts	Fruits	0	Y			
11	10015	Cheesecake	Sweets	4	N			
12	10008	Chicken Caesar	Salads	5.3	N			

Editing and Saving the File

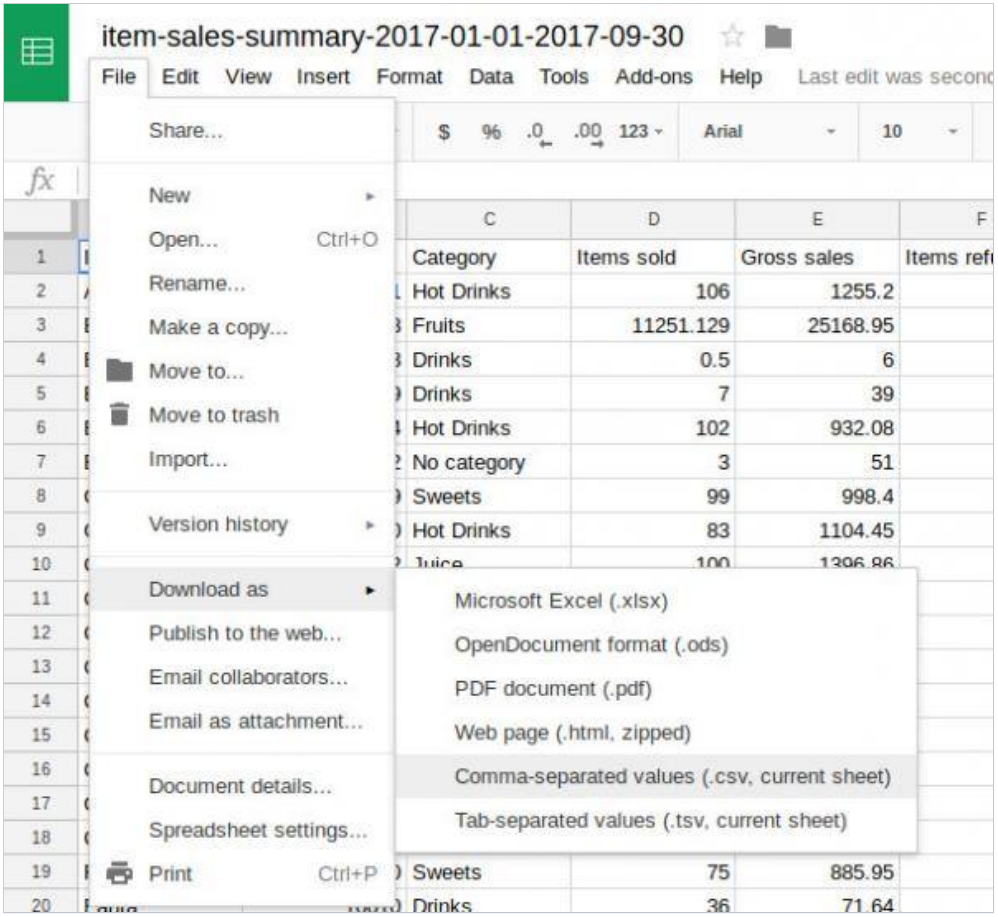
You can edit the spreadsheet as needed.

If you want to save the file in **CSV format** for further importing into the Loyverse Back Office:

Open the **File** menu.

Select **Download as**.

Choose **Comma-separated values (.csv)**.



The file will be downloaded to your computer and will be ready for upload back into Loyverse.

This method helps ensure that your data format remains correct and prevents errors during import.

See also:

How to Export Data from Reports and Open in LibreOffice Calc or OpenOffice Calc

How to Export Data from Reports and Open in Excel

Importing and Exporting Items

How to Create and Configure Discounts

Video
https://www.youtube.com/watch?v=nTh66kU5Op0

You can create and manage discounts in both the Back Office and the Loyverse POS mobile app. Discounts can be set as a percentage or a fixed amount and can be restricted to authorized employees.

Creating Discounts in the Back Office

1. **Log in** to the Back Office.
2. In the '**Items**' menu, select '**Discounts**'.
3. Click the '**+ Add Discount**' button.

Fill in the details:

Name – Give your discount a clear and recognizable name.

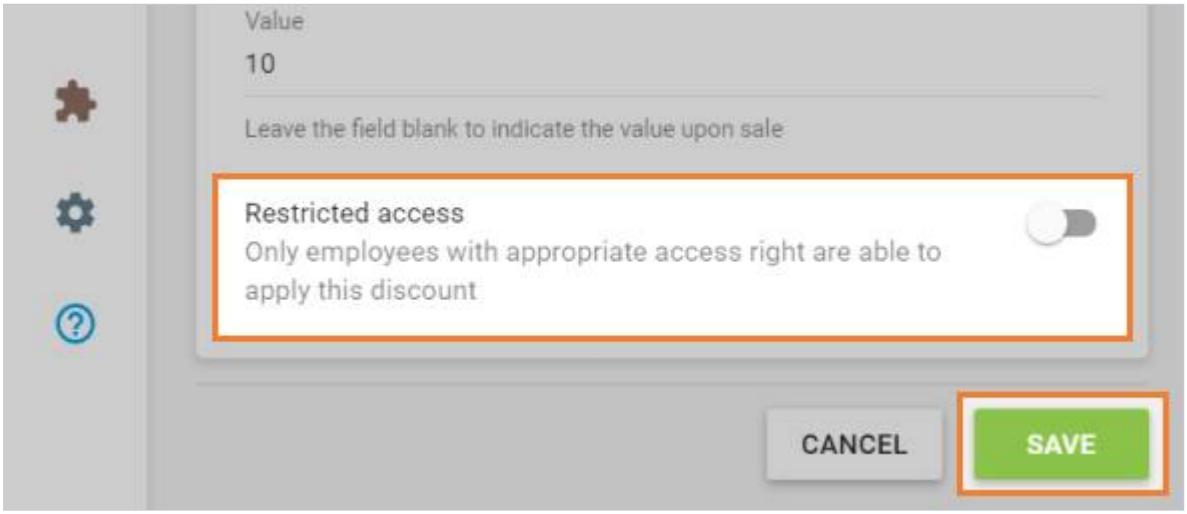
Type – Choose between:

- **Percentage (%)** – Can be applied to the **entire ticket** or **individual items**.
- **Amount (∑)** – Can only be applied to the **entire ticket**.

Value:

- For **Percentage** discounts: Enter a number between **0.01%** and **100%**.
- For **Amount** discounts: Enter the fixed amount to be deducted.
- You can leave the **Value** field empty to set the discount amount during the sale (only applicable to whole-ticket discounts).

Optional:
Restricted Access – Activate this option to allow only employees with the corresponding access right to apply this discount.



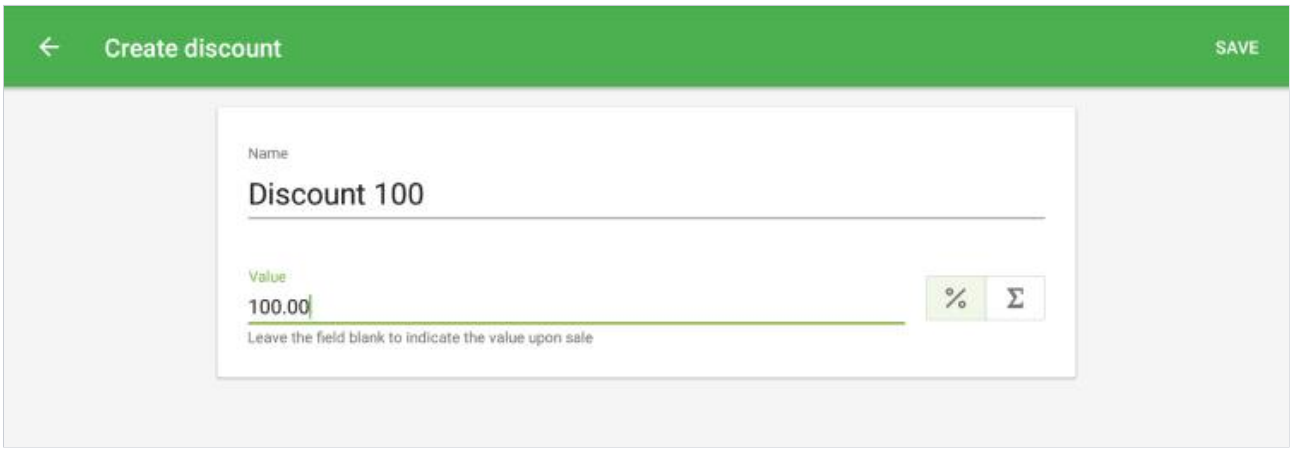
Click '**Save**' to store your discount.

Creating Discounts in the Mobile App

1. Open the **Loyverse POS** app.
2. From the main menu, go to '**Items**'.
3. Tap '**Discounts**' to view all discounts created in both the Back Office and the app.
4. To create a new discount, tap the **'+'** button in the bottom right corner.

Fill in the details:

Name – Enter the discount name.



Type – Choose:

- **Percent (%)** – Applies to the whole ticket or individual items.
- **Amount (∑)** – Applies only to the whole ticket.

Value – Enter the percentage or amount (optional if it will be set during the sale).

Tap '**Save**' to confirm.

Applying Discounts During Sales

Once your discounts are created, they will be available to apply during checkout. Depending on the discount type, you can:

- Apply to **specific items** from the ticket.

- Apply to the **entire ticket**.

For detailed steps on applying discounts during a sale, see the guide: **How to Apply Discounts During a Sale**.

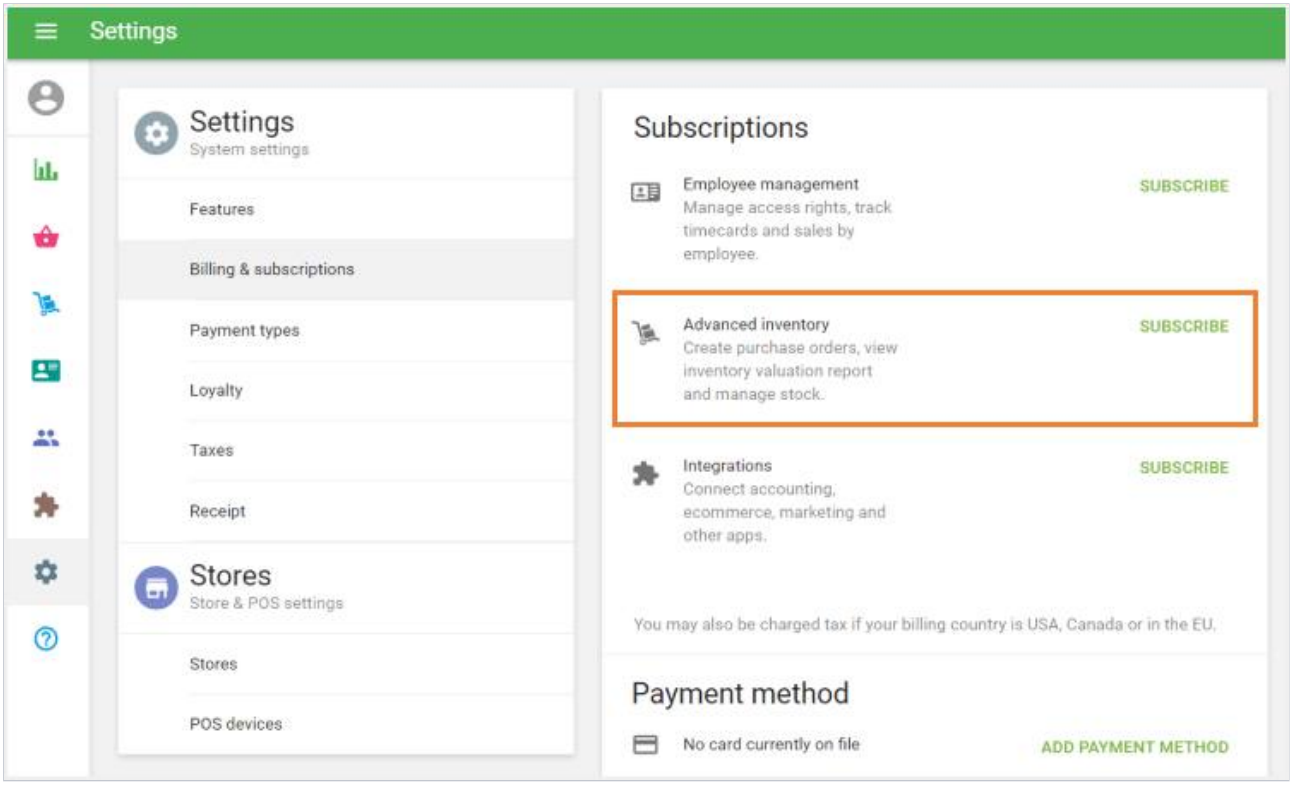
Inventory

What is Advanced Inventory Management

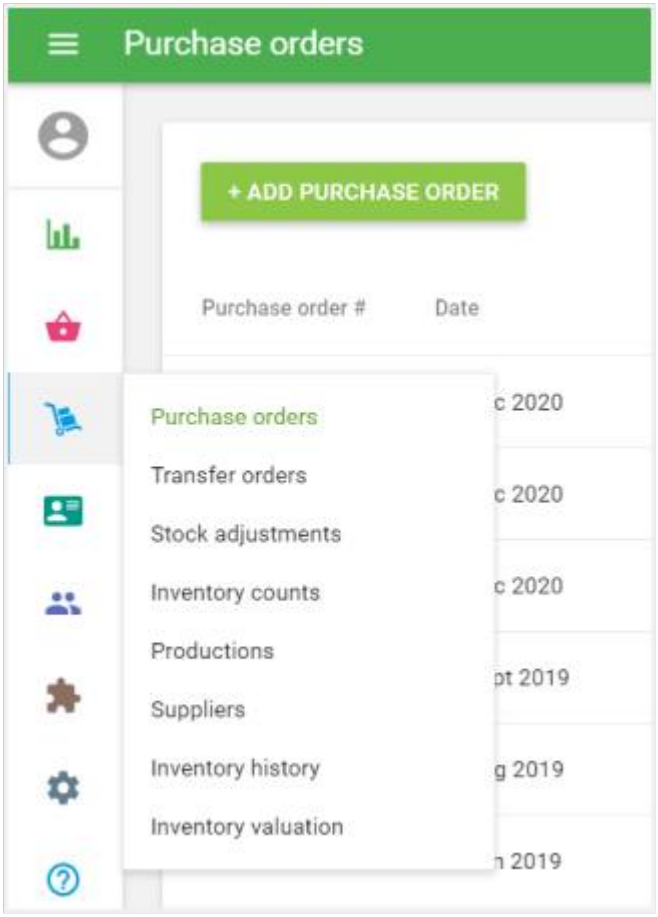
Video
https://www.youtube.com/watch?v=4TPkIMNusgw

Advanced Inventory Management is a set of additional Back Office features that helps you track stock levels more efficiently, monitor inventory changes, and calculate business profitability with greater accuracy.

Note: Advanced Inventory Management is available on paid subscriptions only. To activate a subscription or start a trial period, go to **Settings → Billing & Subscriptions** in the Back Office.



Once activated, the **Advanced Inventory** menu will appear in the Back Office.



Advanced Inventory Menu

The Advanced Inventory menu includes the following sections:

- **Purchase Orders** — Create and save product supply orders, send them to suppliers, receive products, and store supplier information in the system.
- **Transfer Orders** — Distribute items between stores. Ideal for multi-store owners who need to manage stock across locations.
- **Stock Adjustments** — Modify stock quantities for individual items and record the reason for each adjustment.
- **Inventory History** — View a complete log of all inventory changes, including transfers, purchase orders, and adjustments.
- **Inventory Valuation Report** — Get a clear picture of the total cost of your current inventory and the potential profit from selling it.
- **Inventory Count** — Reconcile expected and actual inventory for all or selected items, identify shortages or surpluses, and maintain records for each count.
- **Printing Labels** — Print labels for items directly from the Items list. Each label can include the item name, SKU, price, and barcode. Barcoded labels enable scanning to add items to a ticket.

- **Production** — Track the inventory of produced items separately from their components. This is particularly useful for items prepared in advance rather than made to order — for example, baked goods in a bakery. Produced items can be moved between stores using inventory adjustments and inventory counts.

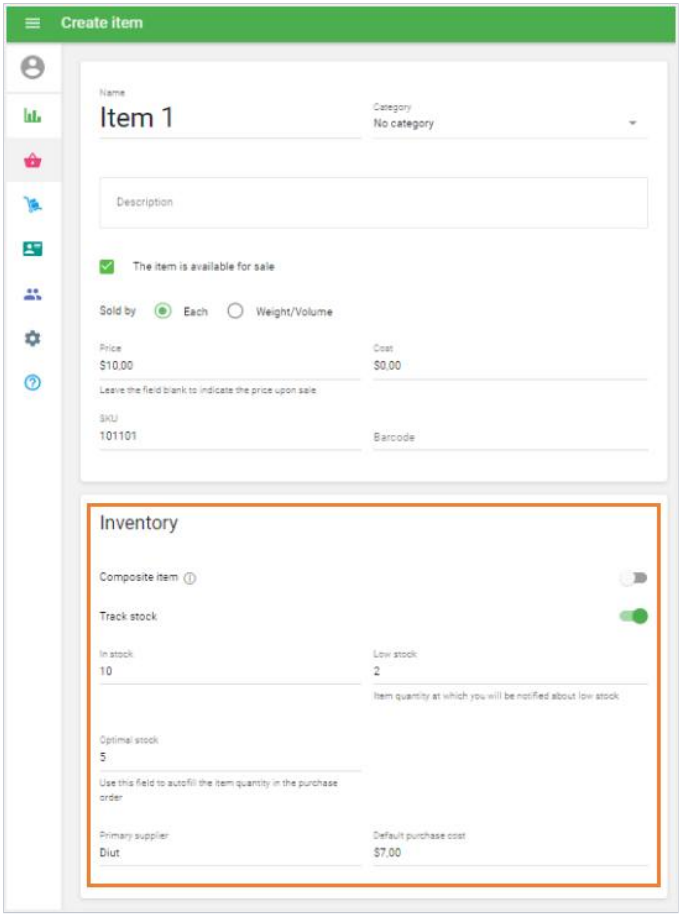
How Advanced Inventory Affects Items

Enabling Advanced Inventory Management changes both the appearance of the Item form and how item costs are calculated.

Setting Up an Item

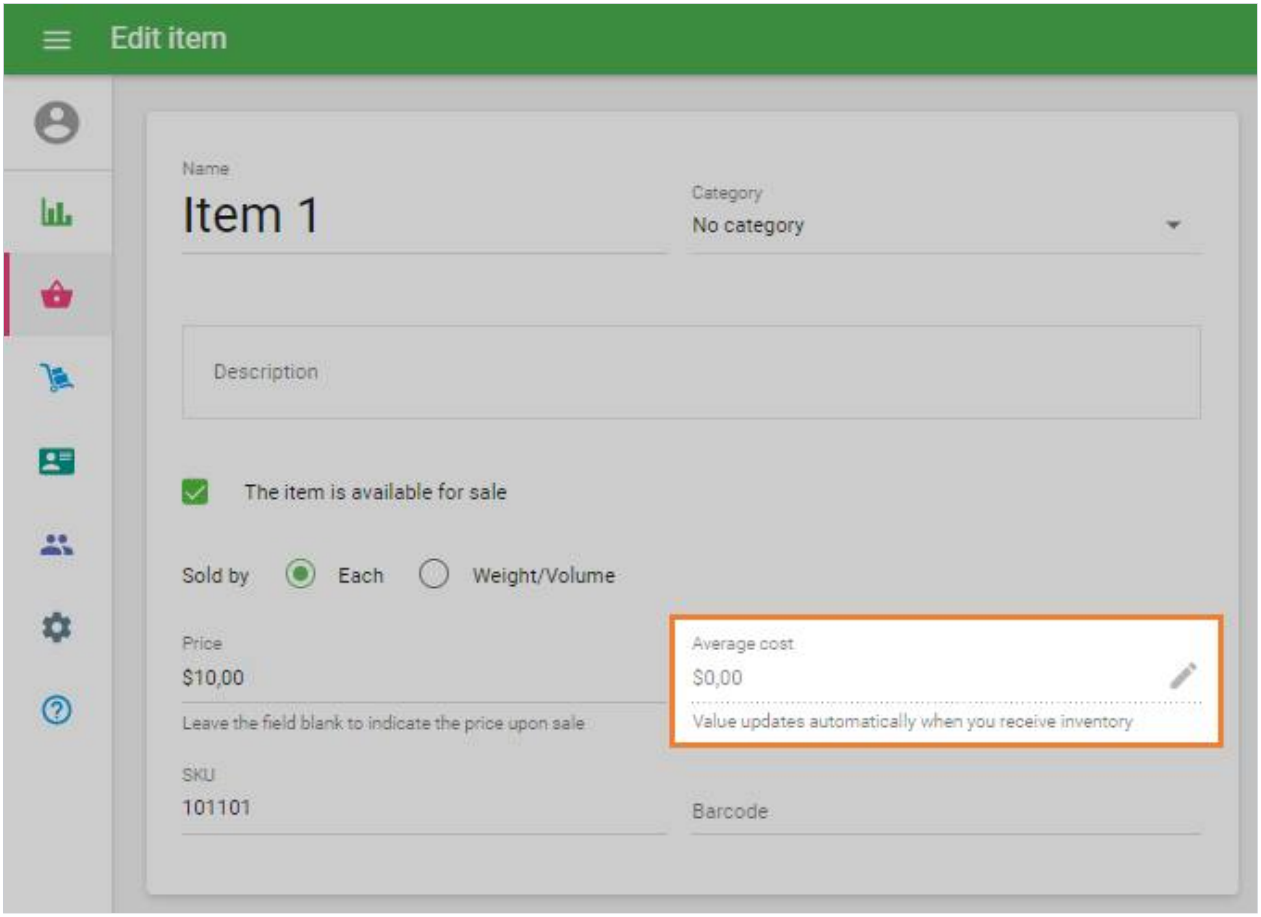
When creating a new item, you can enter the **Price** and **Cost** as usual. However, once you enable **Track Stock** in the Inventory section, additional fields become available:

- **Primary Supplier** — Assign a default supplier for the item from your supplier list.
- **Default Purchase Cost** — Set the standard cost used when ordering from the primary supplier.



Average Cost Calculation

After you save the item and reopen it for editing, the **Cost** field is replaced by a read-only **Average Cost** field.



This value is calculated automatically each time you receive items through the Advanced Inventory functionality, using the following formula:

$$NewCost = \frac{(StockBefore \times CostBefore + StockAdded \times CostOfAdded)}{(StockBefore + StockAdded)}$$

Variable	Description
StockBefore	Quantity in stock before receiving new items
StockAdded	Quantity of newly received items
CostBefore	Average cost before receiving new items
CostOfAdded	Cost of the newly received items

The resulting **Average Cost** is used across all reports and profitability calculations in the system.

See also:

How to Work with Purchase Orders and Suppliers

How to Work with Transfer Orders

How to Work with Stock Adjustments

Inventory History and Valuation Report

How to Work with Inventory Count

How to Print Labels for Items

How to Work with Additional Costs in the Purchase Orders

How to Work with Production

How to Work with Purchase Orders and Suppliers

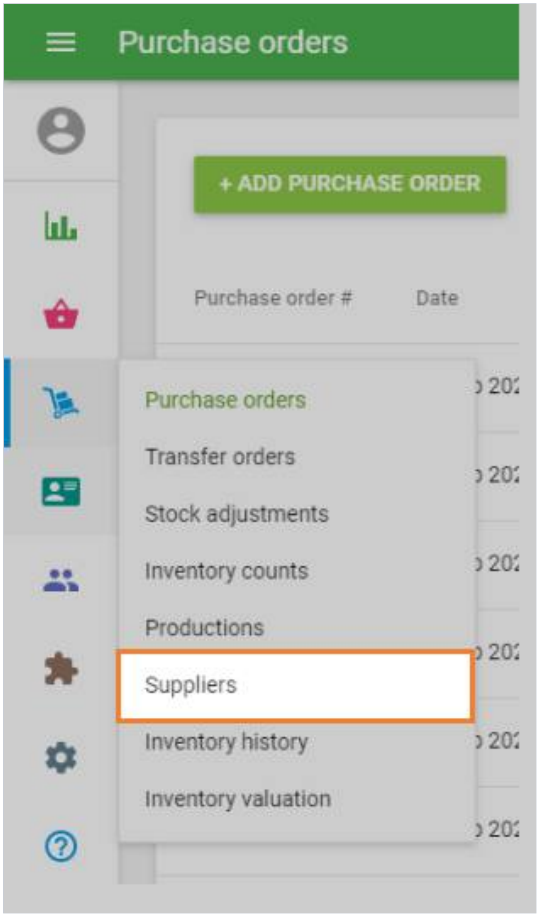
Video
https://www.youtube.com/watch?v=2_7iJdeMWTs

Purchase Orders allow you to create and manage product supply orders, send them to suppliers, receive stock, and maintain a list of suppliers — all within Loyverse.

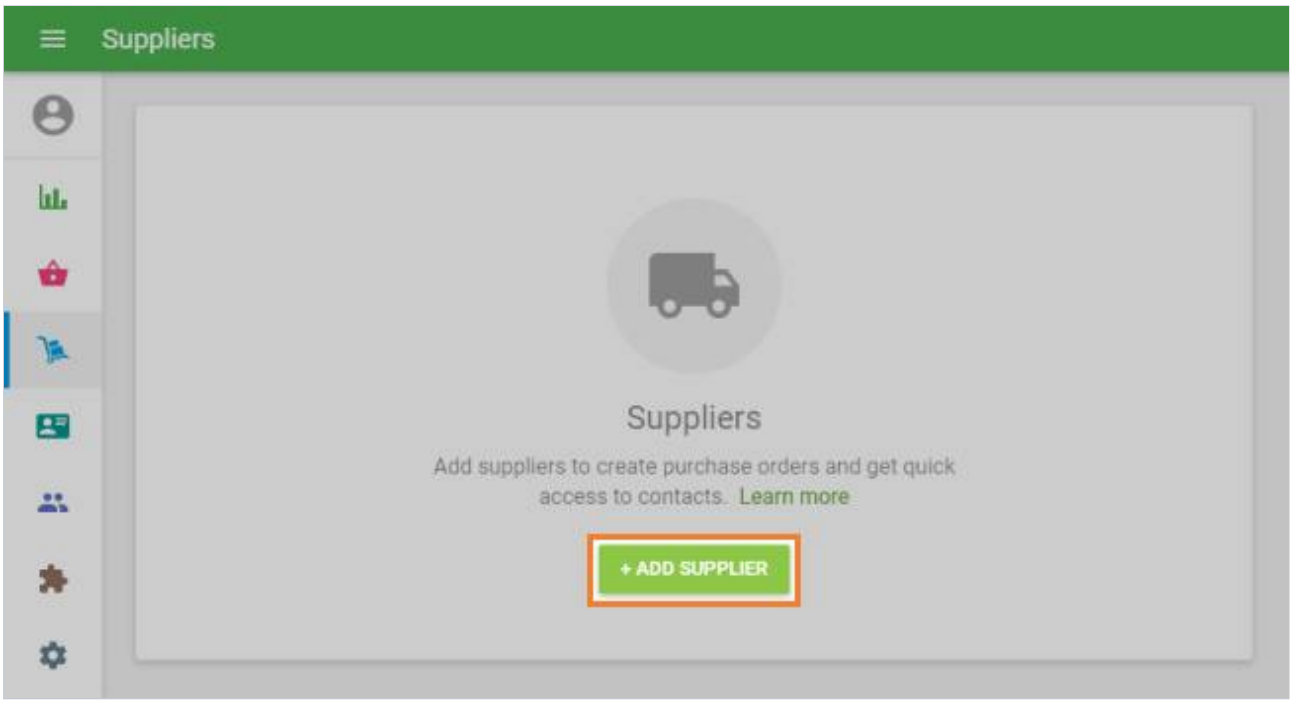
Note: Purchase Orders are part of Advanced Inventory Management and require an active subscription. See Advanced Inventory Management Overview to learn how to activate it.

1. Managing Suppliers

Before creating purchase orders, set up your suppliers.
1. In the Back Office, go to **Inventory Management → Suppliers**.



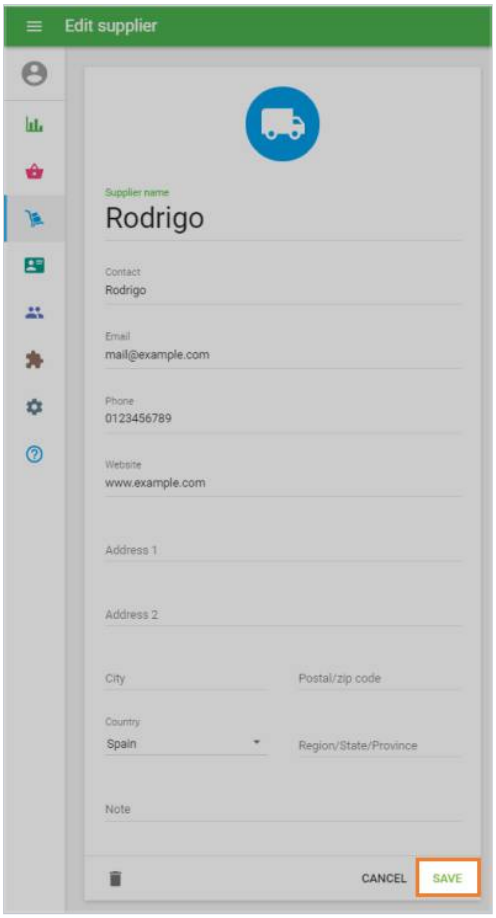
2. Click **+ Add Supplier**.



3. Fill in the **Create Supplier** form:

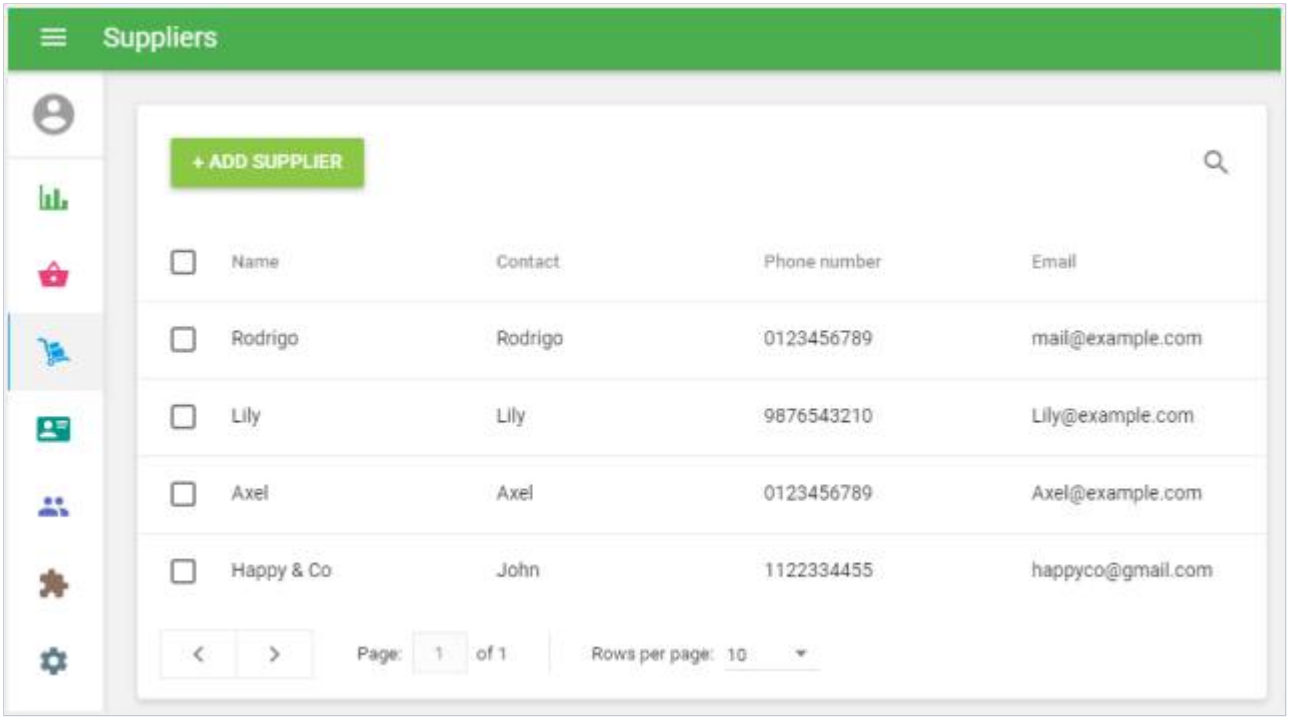
- **Supplier Name** is required and must be unique.

- All other fields are optional, but note that this information will be used to populate purchase orders.



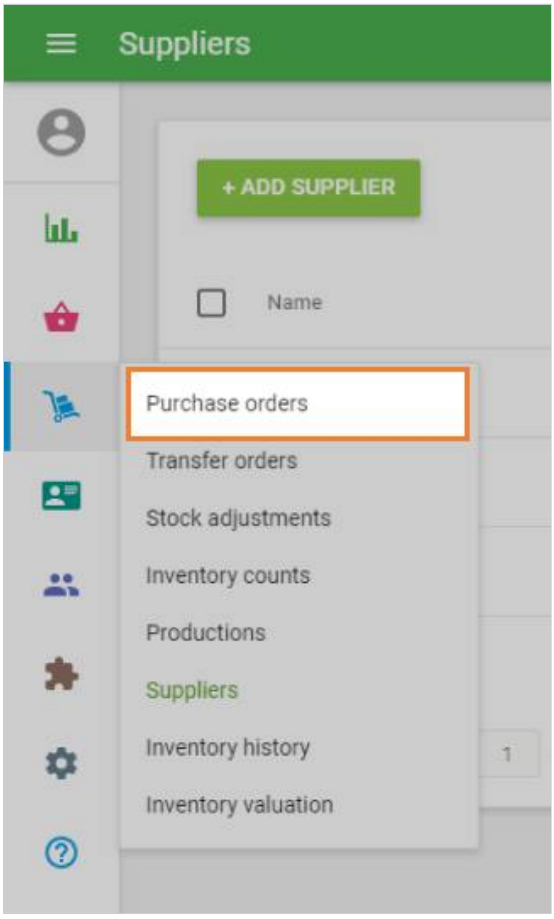
4. Click **Save.**

Once your supplier list is ready, you can start creating purchase orders.

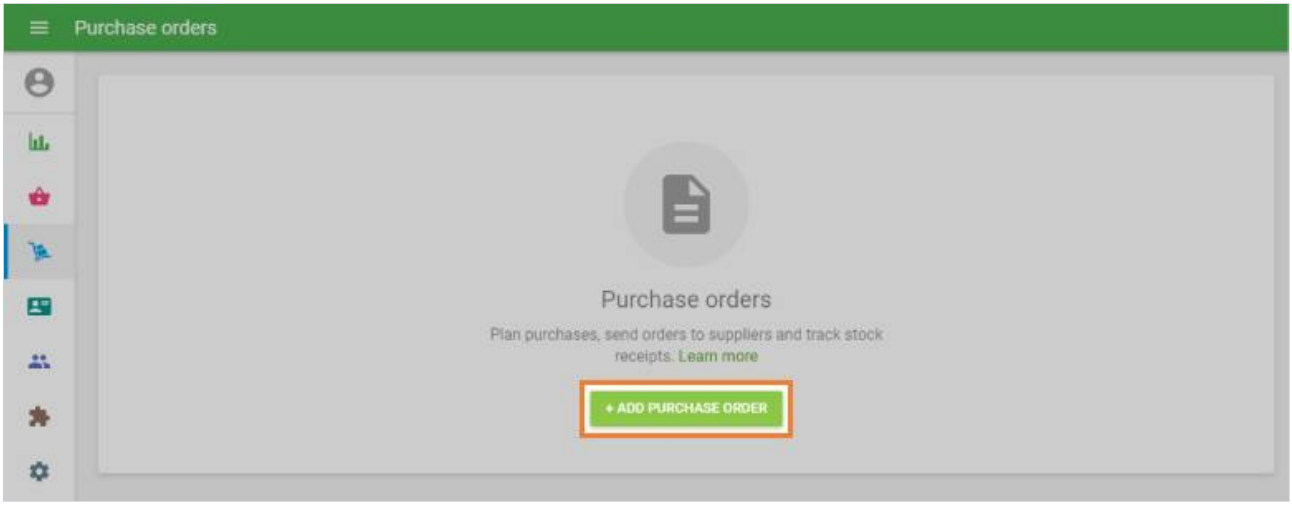


2. Creating a Purchase Order

1. Go to **Inventory Management → Purchase Orders**.

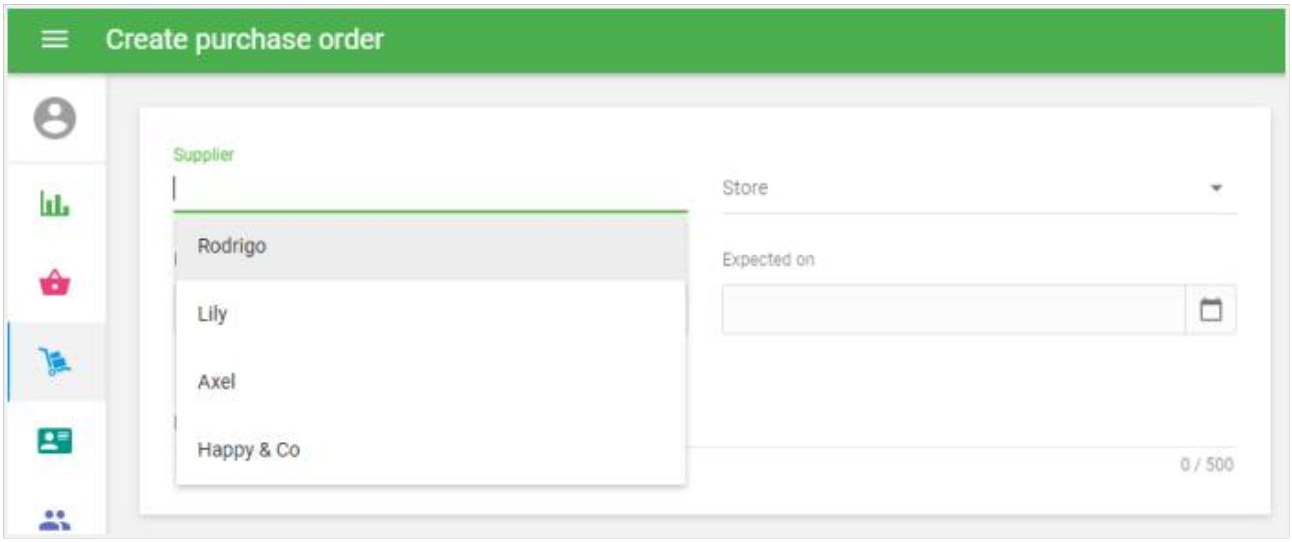


2. Click **+ Add Purchase Order**.

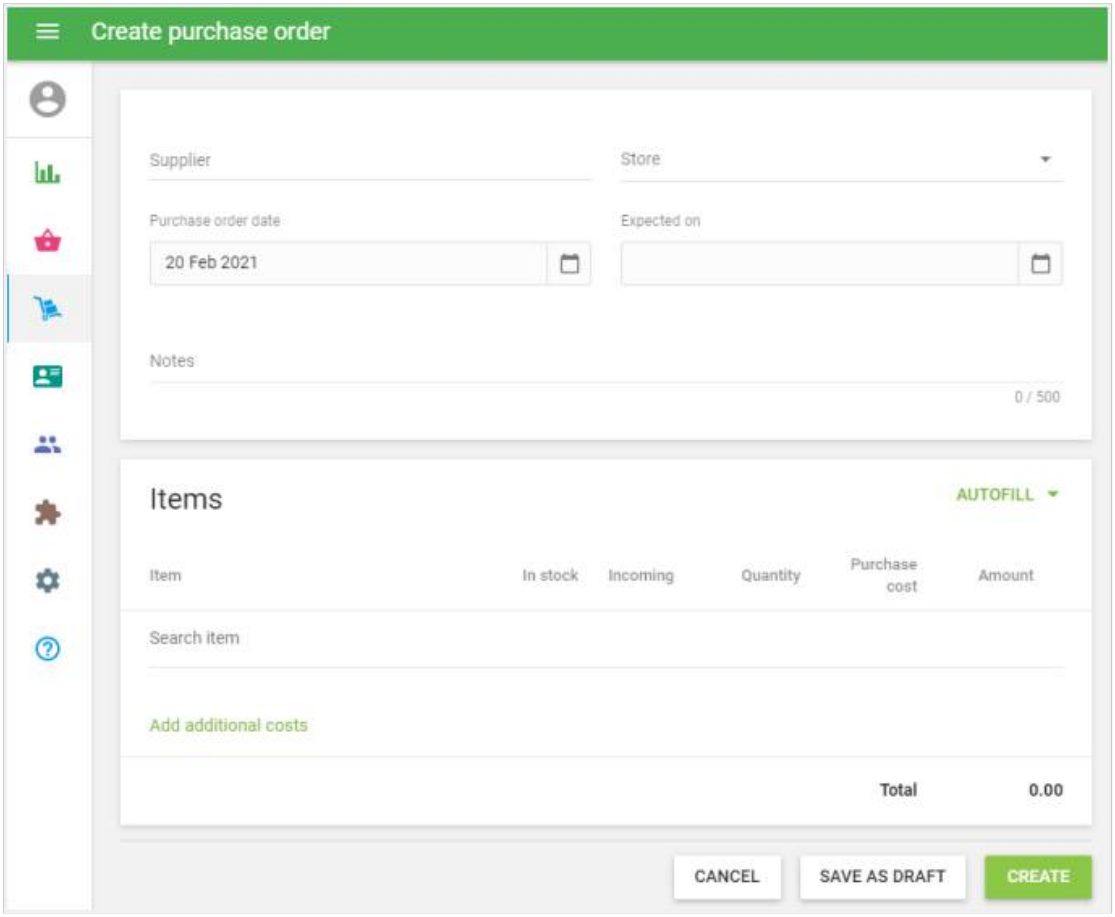


3. In the **Create Purchase Order** form, fill in the following:

- **Supplier** and **Store** — Select from the drop-down lists.

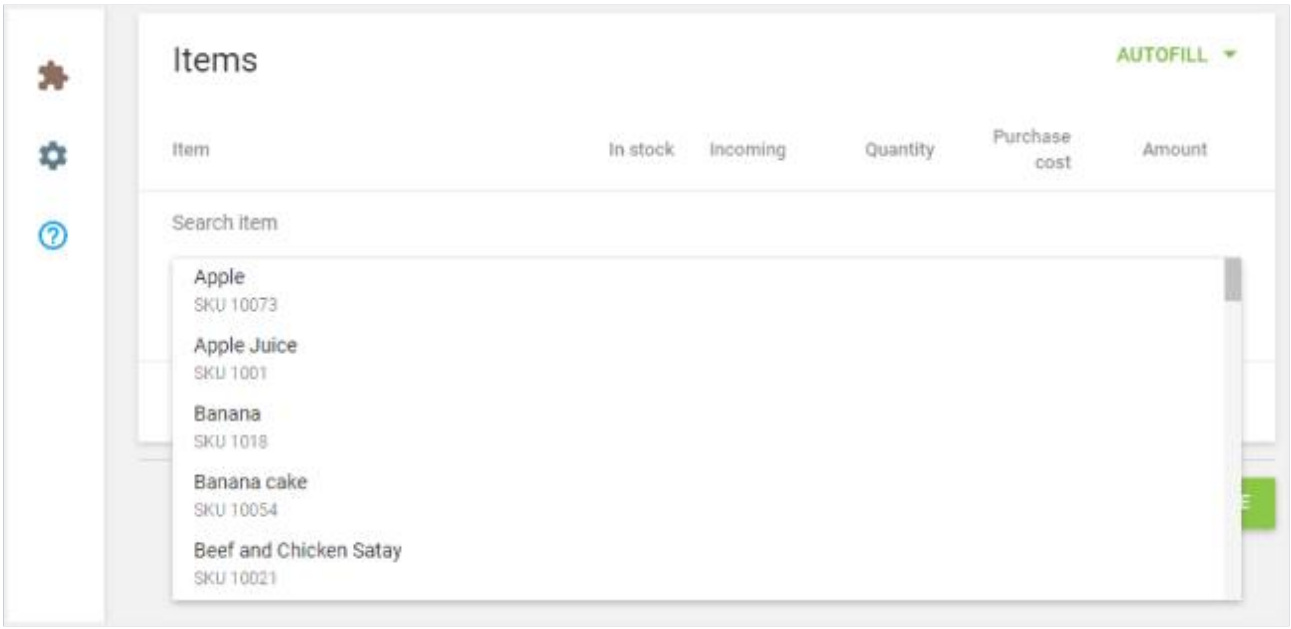


- **Purchase Order Date** — Set the date the order is placed.



- **Expected On** — Set the expected delivery date.
- **Notes** — Add any relevant notes.

4. In the **Items** section, add the products to order. Click the field and type an item name, SKU, or barcode to search. For each item, fill in:



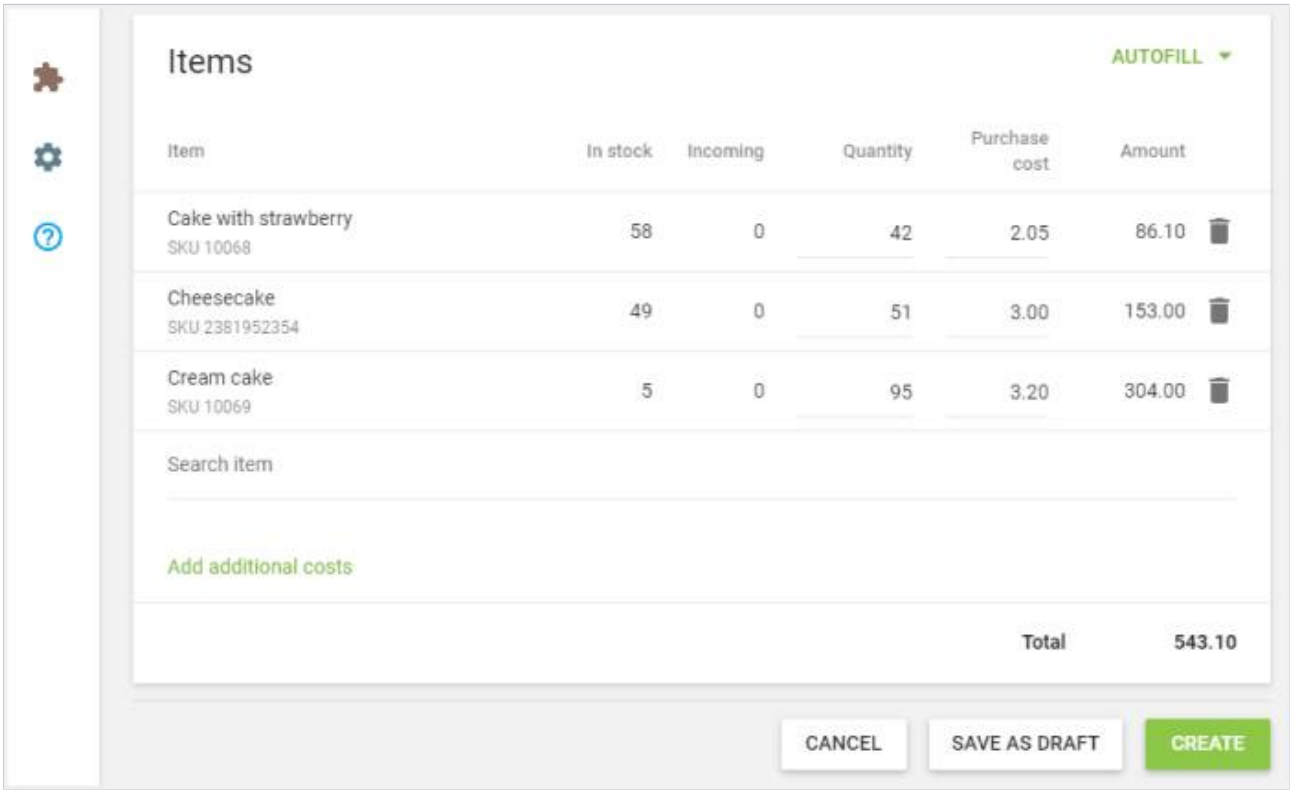
- **Quantity** — The amount to order.

- **Supply Price** — The cost per unit from the supplier.

5. The **Incoming** field shows the total expected quantity for an item based on all existing purchase orders not yet received.

6. Repeat step 4 to add more items.

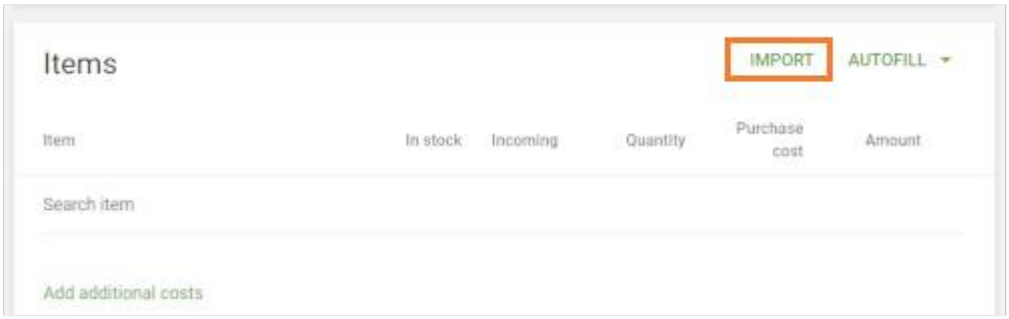
7. When your item list is complete, click **Create** to submit the purchase order, or **Save as Draft** to save it for further editing.



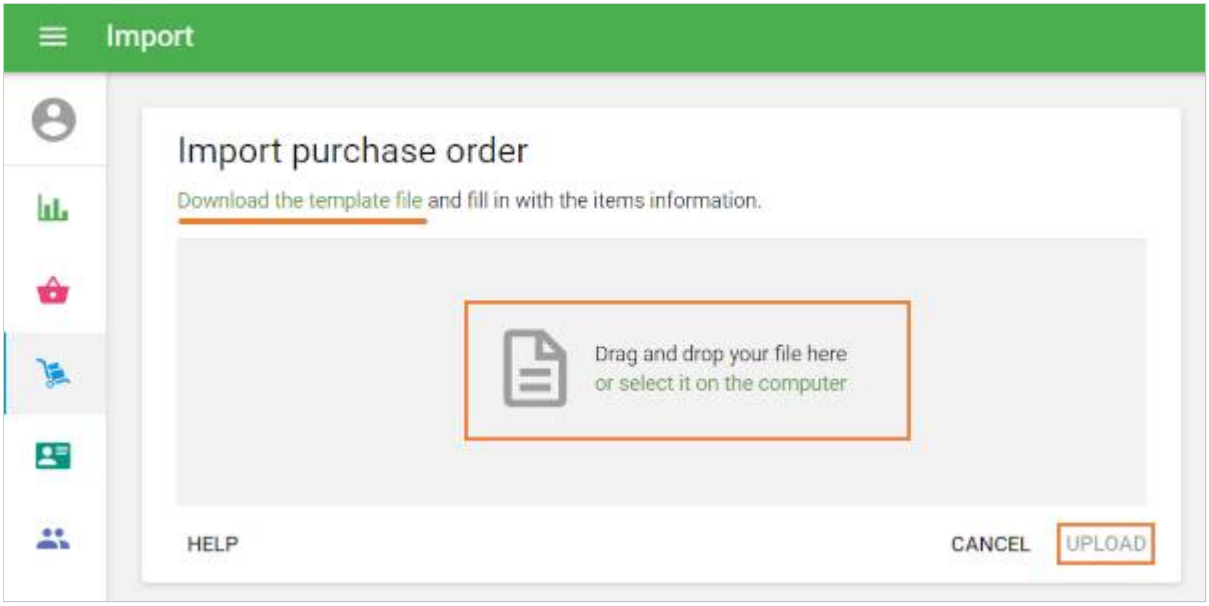
Importing Items via CSV

You can add items in bulk by importing a CSV file:

1. Click the Import button.



2. Download the **CSV template** to your computer.



3. Fill in the template with the following fields:

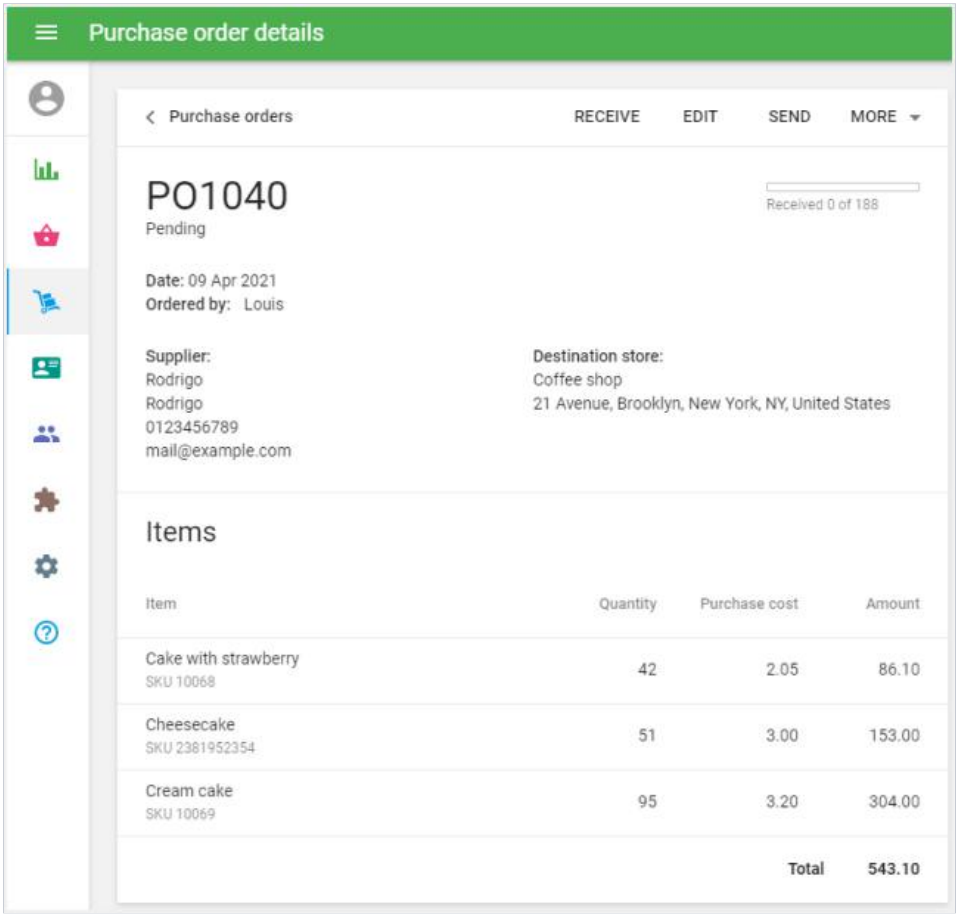
Field	Required
SKU	Required (if Item Name is not provided)
Item Name	Required (if SKU is not provided)
Variant Name	Optional
Quantity	Optional
Purchase Cost	Optional

4. Select the completed file from your computer and click Upload.

3. Managing a Purchase Order

Once a purchase order is created, the following actions are available from the order details page:

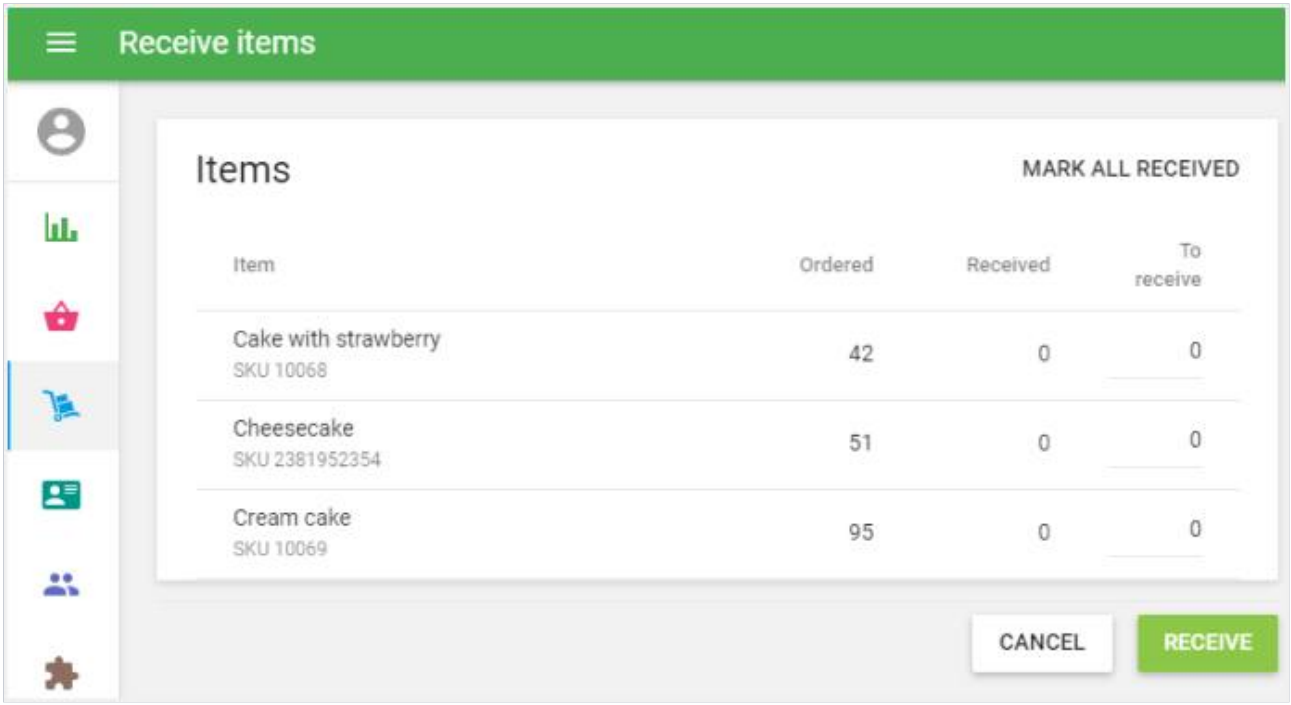
Action	Description
Receive	Records the receipt of items (see below).
Edit	Opens the order for editing.
Send	Emails the purchase order to the supplier as an attached file.
More	Additional options include: downloading the order as a PDF or CSV, duplicating the order, printing labels for the items in the order, and canceling remaining items.



Receiving Items

1. Click the **Receive** button on the purchase order details page.

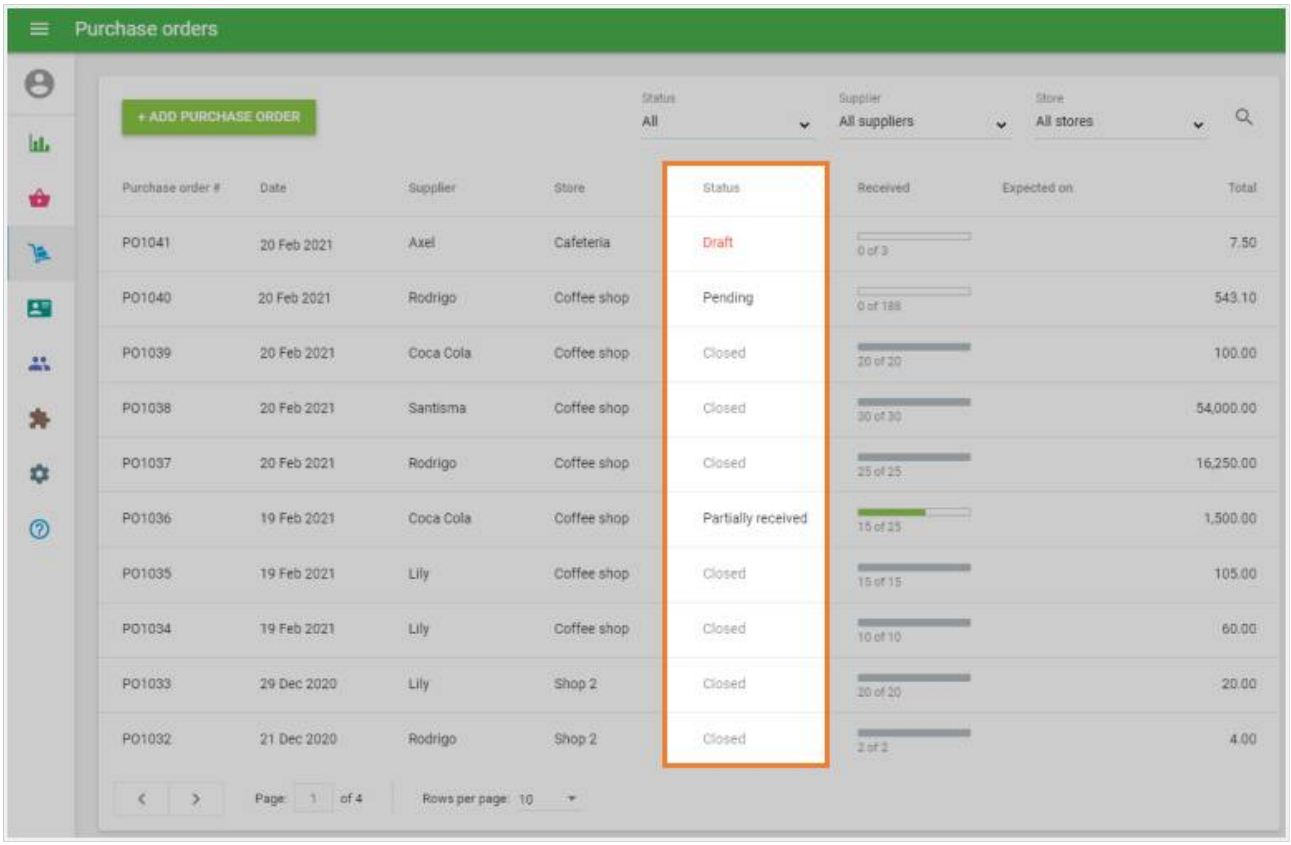
2. Enter the quantity received in the **To Receive** field for each item, or click **Mark All Received** to confirm the full order.



3. Click **Receive** to confirm.

Once received, the stock levels and **average cost** of each item will be updated automatically based on the supply price specified in the order.

Purchase Order Statuses



Status	Meaning
Draft	Order saved but not yet submitted.
Pending	Order created and awaiting receipt of items.
Partially Received	Some items in the order have been received.
Closed	All items have been received, and the order is complete.

See also:

Advanced Inventory Management Overview

How to Work with Transfer Orders

How to Work with Stock Adjustments

Inventory History

How to Work with Transfer Orders

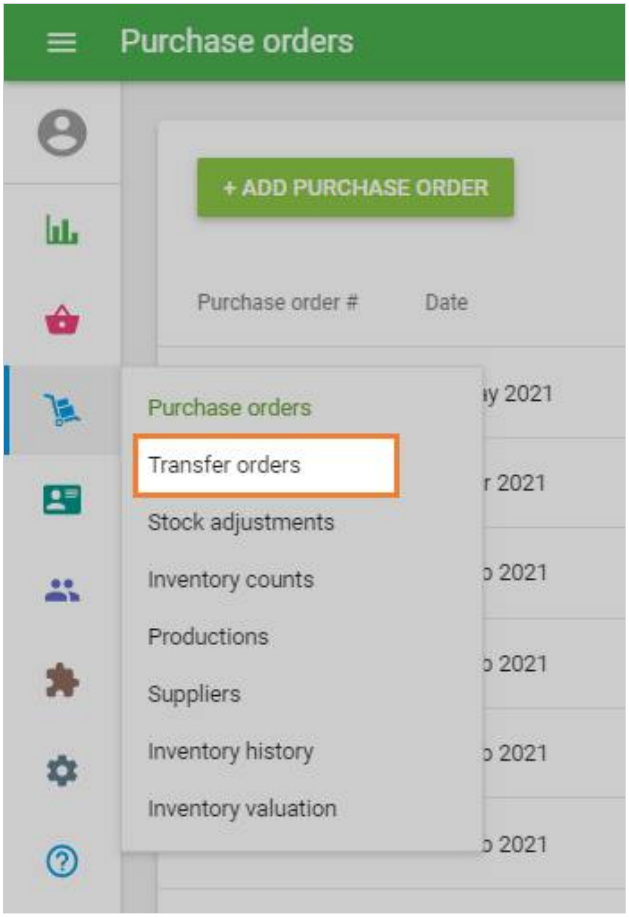
Video
https://www.youtube.com/watch?v=f18R_oEiNAU

Transfer Orders allow multi-store owners to move stock between their stores accurately and with a clear audit trail.

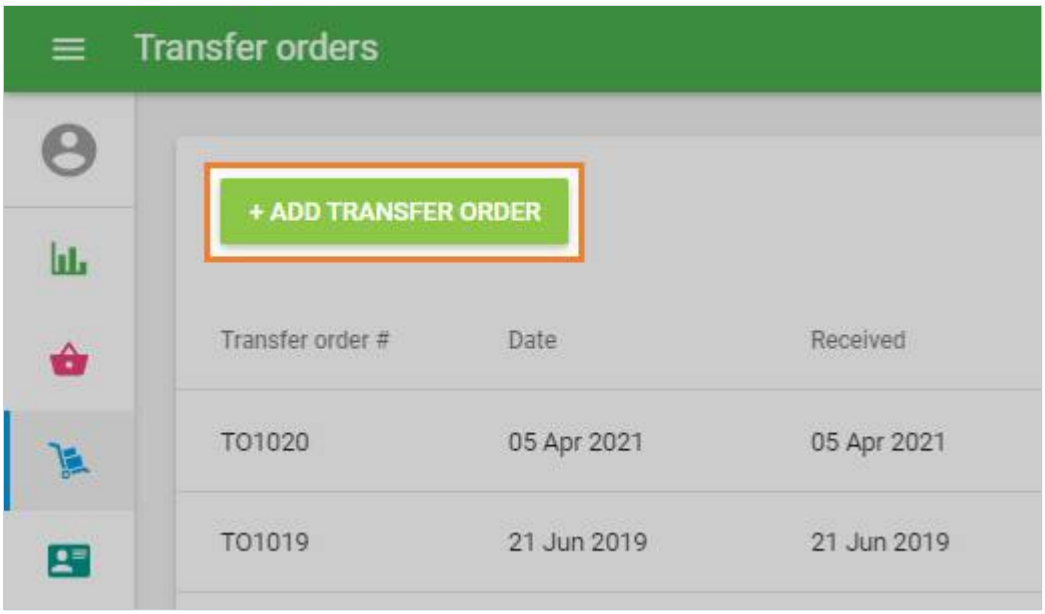
Note: Transfer Orders are part of Advanced Inventory Management and require an active subscription. See Advanced Inventory Management Overview to learn how to activate it.

Creating a Transfer Order

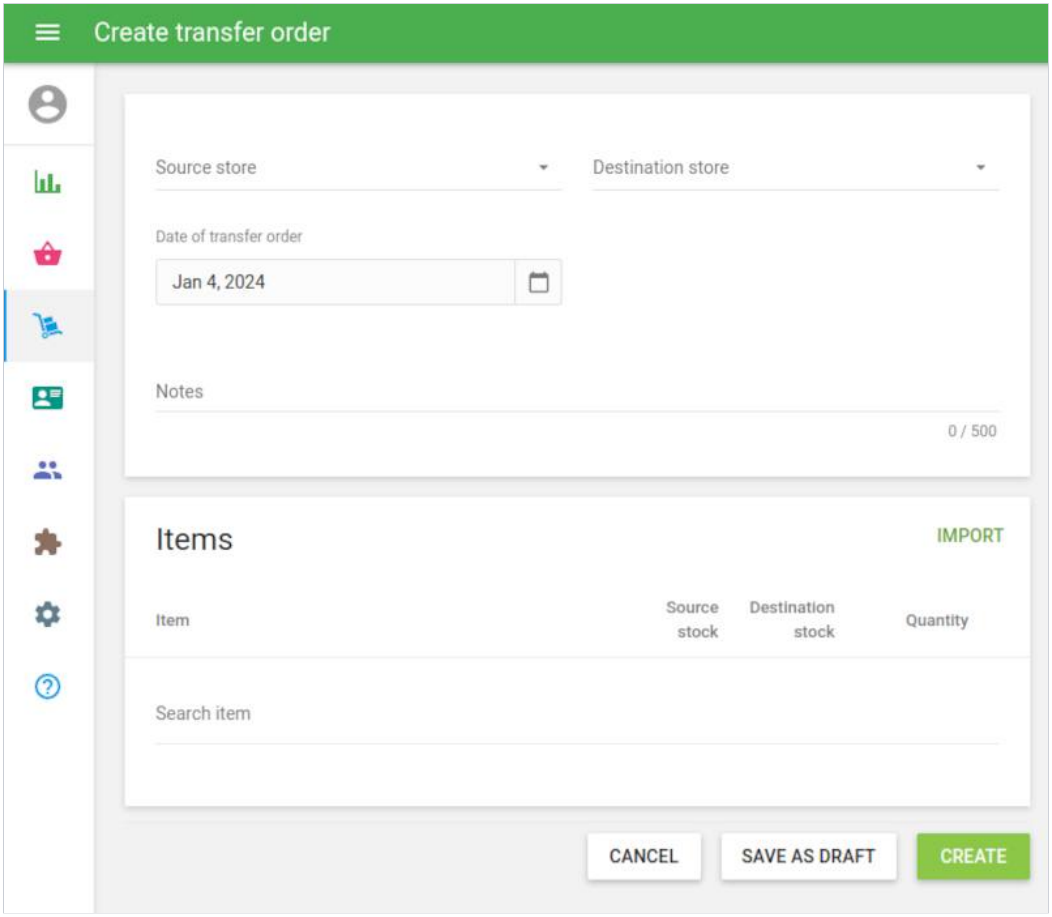
In the Back Office, go to **Inventory Management → Transfer Orders**.



Click **+ Add Transfer Order**.



In the **Create Transfer Order** form, select the **Source Store** and **Destination Store** from the drop-down lists.

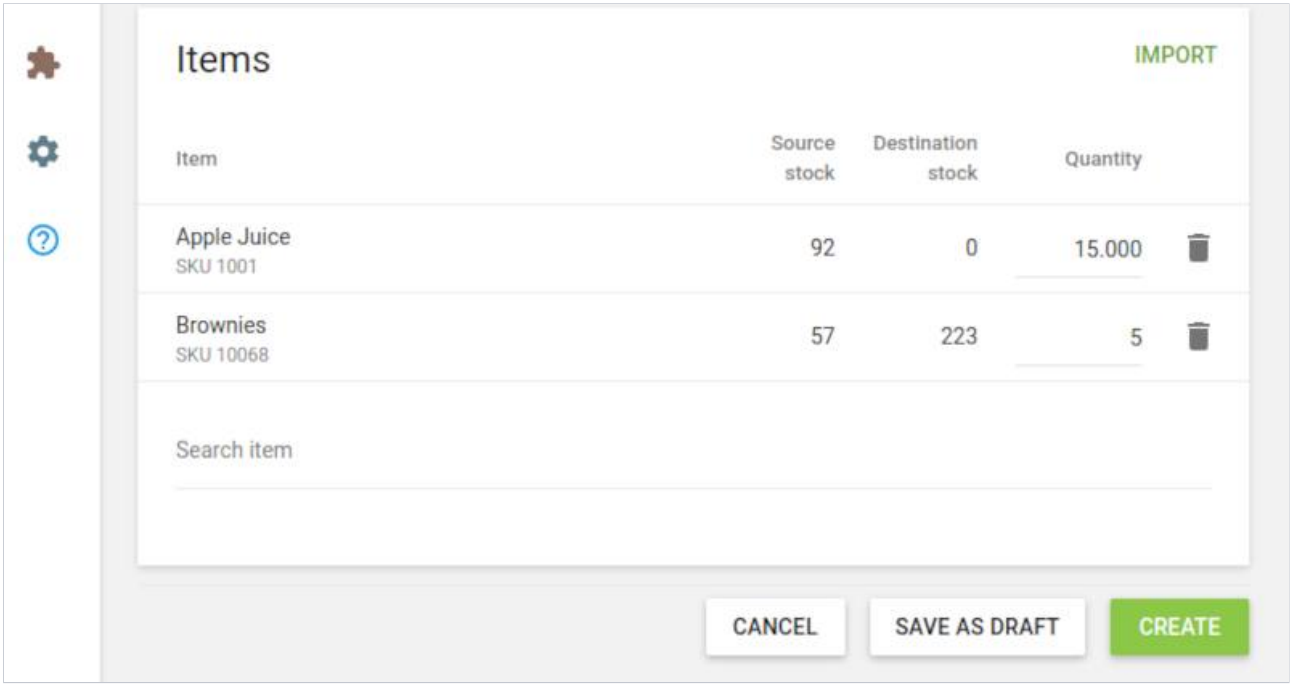


Optionally, adjust the following fields:

- **Date** — Change the transfer date to schedule a future transfer or record a past one.
- **Notes** — Add any relevant notes for the order.

Adding Items

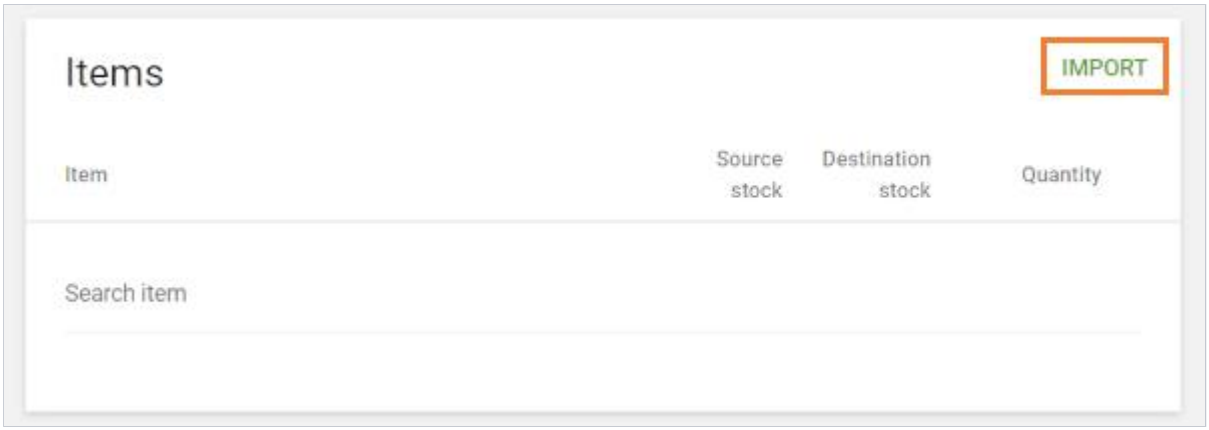
In the **Items** section, add the products you want to transfer. Only items with the **Track Stock** option enabled will appear in the list. For each item, you'll see the current stock levels at both the source and destination stores. Enter the quantity to transfer in the **Quantity** field.



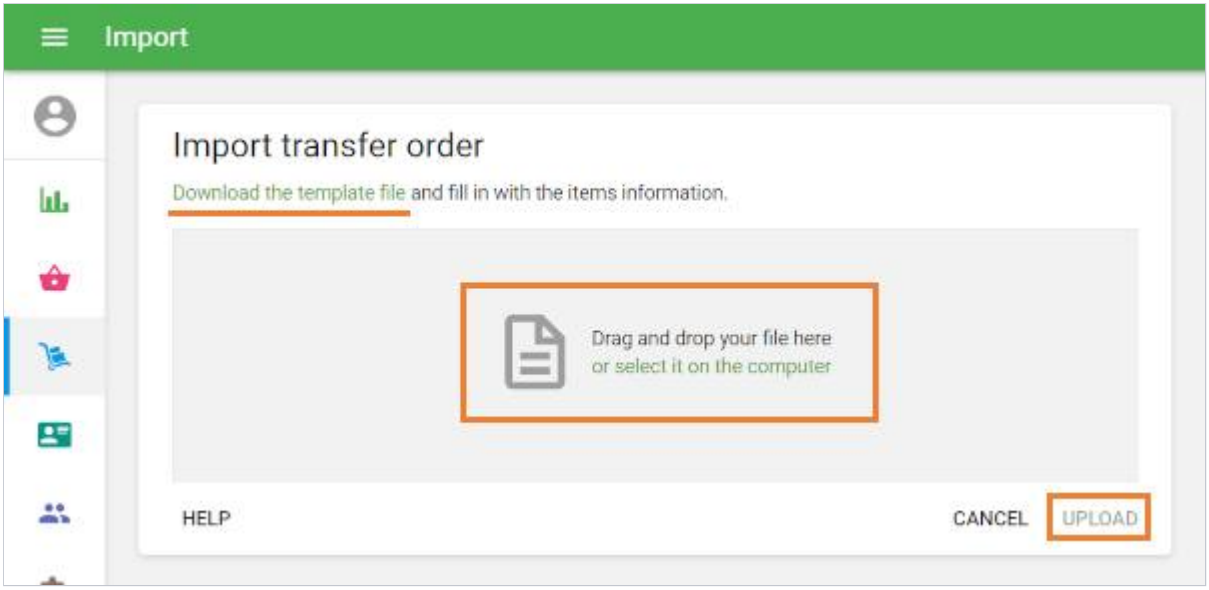
Importing Items via CSV

You can also add items in bulk by importing a CSV file:

Click the **Import** button.



On the Import page, download the **CSV template** to your computer.



Fill in the template with the following fields:

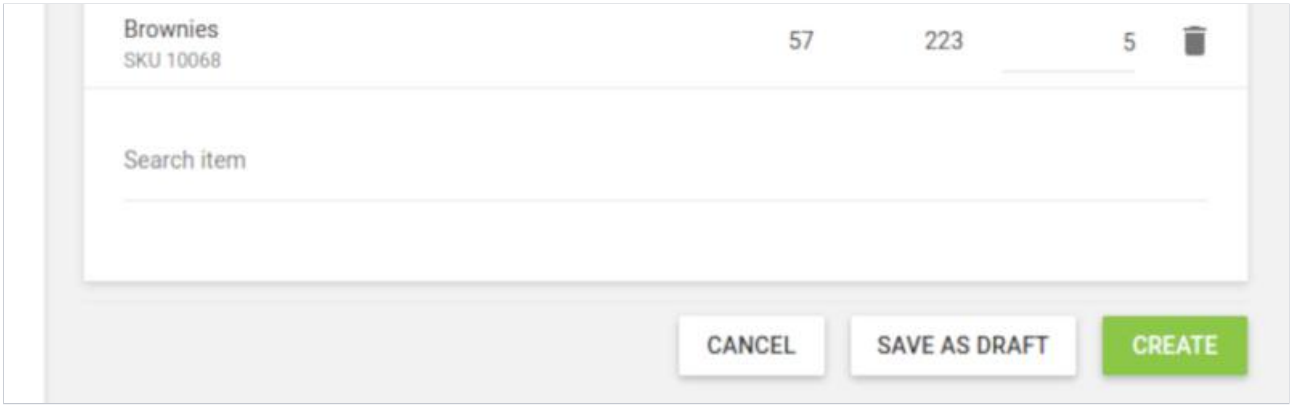
Field	Required
SKU	Required (if Item Name is not provided)
Item Name	Required (if SKU is not provided)
Variant Name	Optional
Quantity	Optional

Select the completed CSV file from your computer and click **Upload**.

Saving the Transfer Order

Once your item list is ready, choose one of the following options:

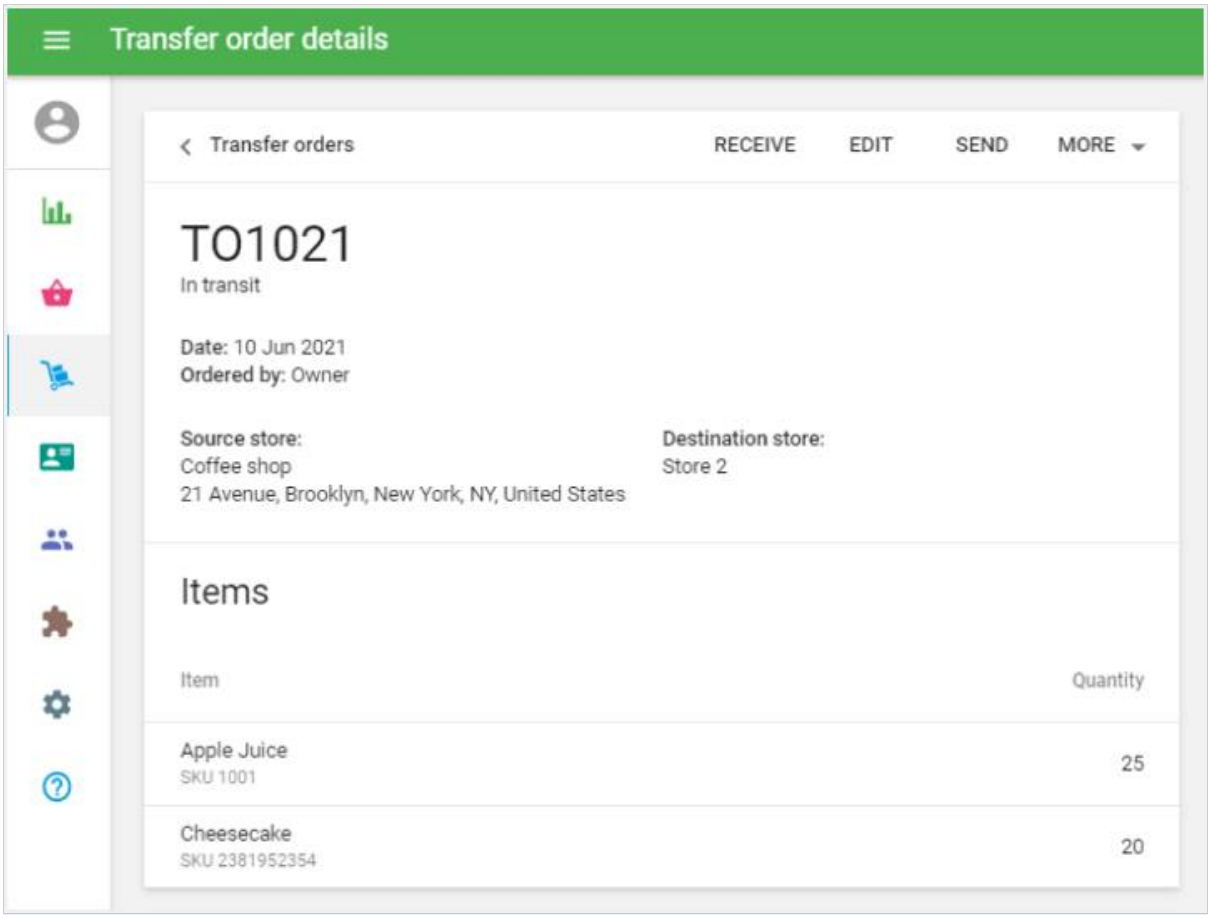
- **Save as Draft** — Saves the order without making any stock changes.
- **Create** — Creates the transfer order and reduces stock at the source store immediately.



Managing the Transfer Order

After creating the order, the following actions are available from the Transfer Order details page:

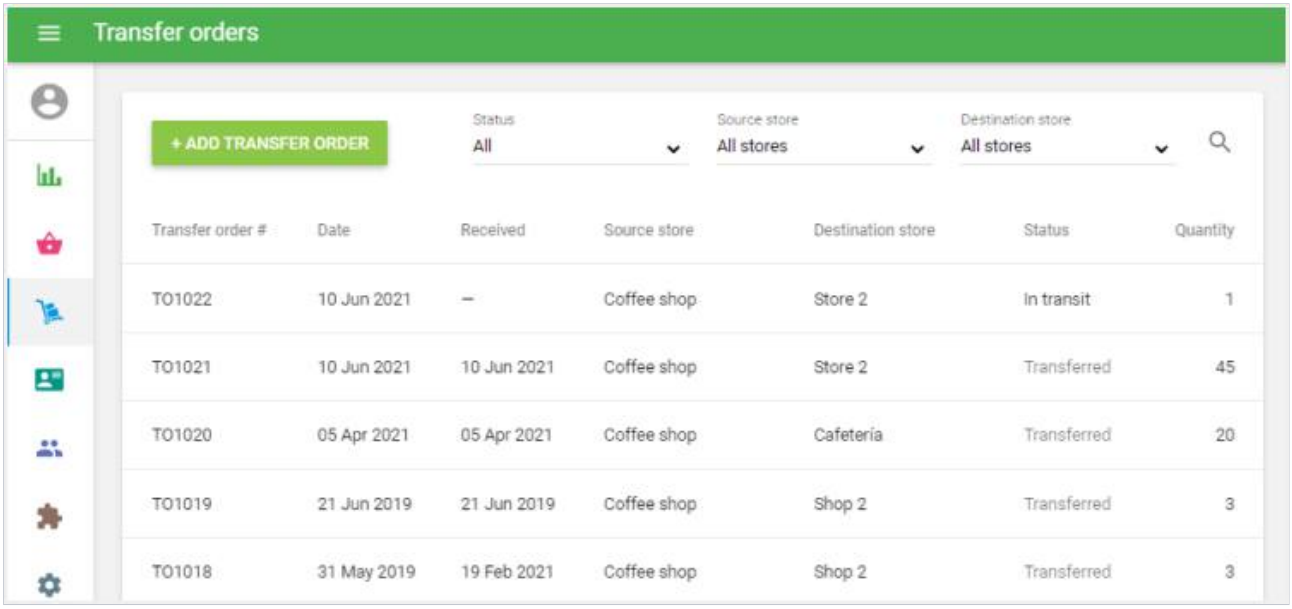
Action	Description
Send	Emails the transfer order to the destination store.
Edit	Opens the order for editing.
More → Download	Downloads the order as a PDF or CSV file.



Transfer Order Statuses

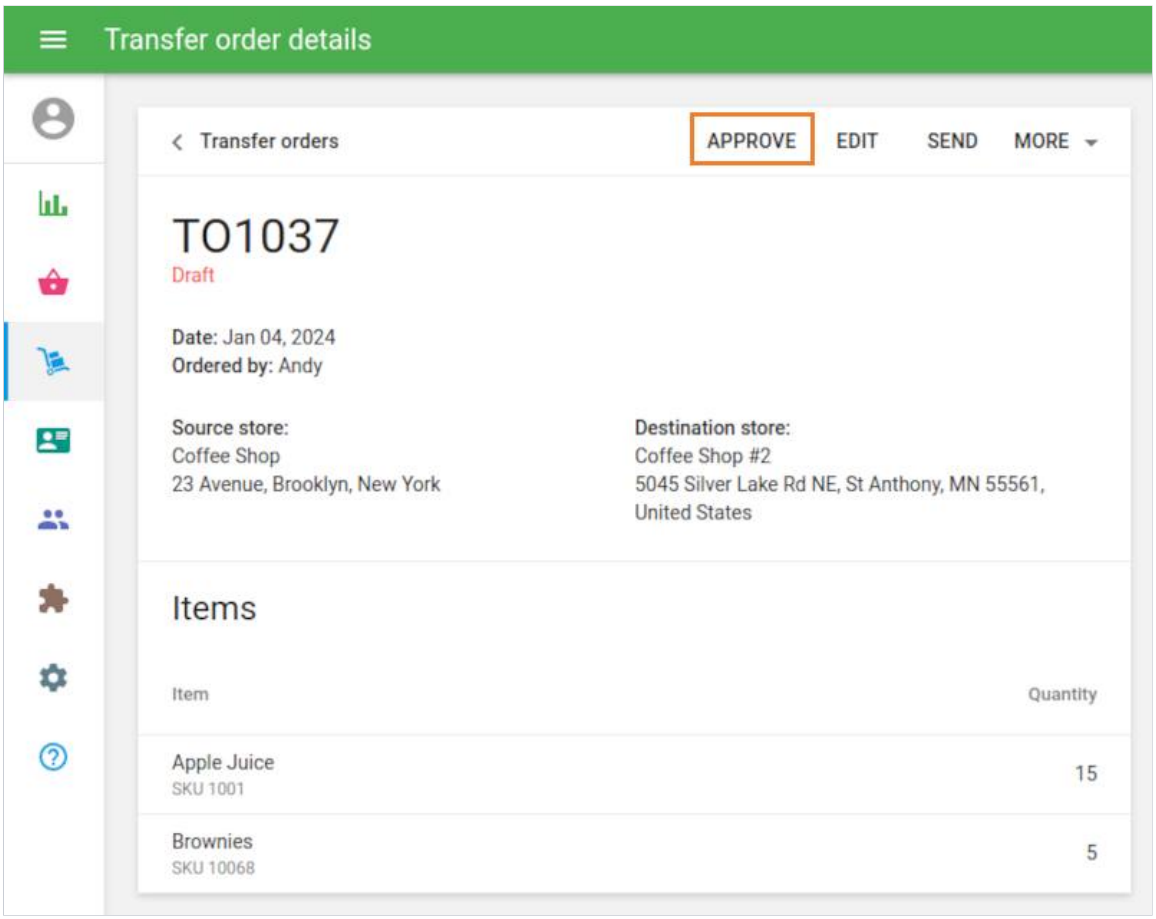
Transfer orders move through the following statuses:

Status	Meaning
Draft	Order saved, no stock changes made.
In Transit	Order approved — source store stock is reduced, destination store stock is unchanged.
Transferred	Destination store has confirmed receipt — destination store stock is updated.



Moving Between Statuses

To move from **Draft** to **In Transit**, click **Approve** on the Transfer Order details page.



To complete the transfer and move to **Transferred**, click **Receive** once the items arrive at the destination store. The destination store's stock will be updated to reflect the received quantity.

See also:

Advanced Inventory Management Overview

How to Work with Purchase Orders and Suppliers

How to Work with Stock Adjustments

Inventory History and Valuation Report

How to Work with Stock Adjustments

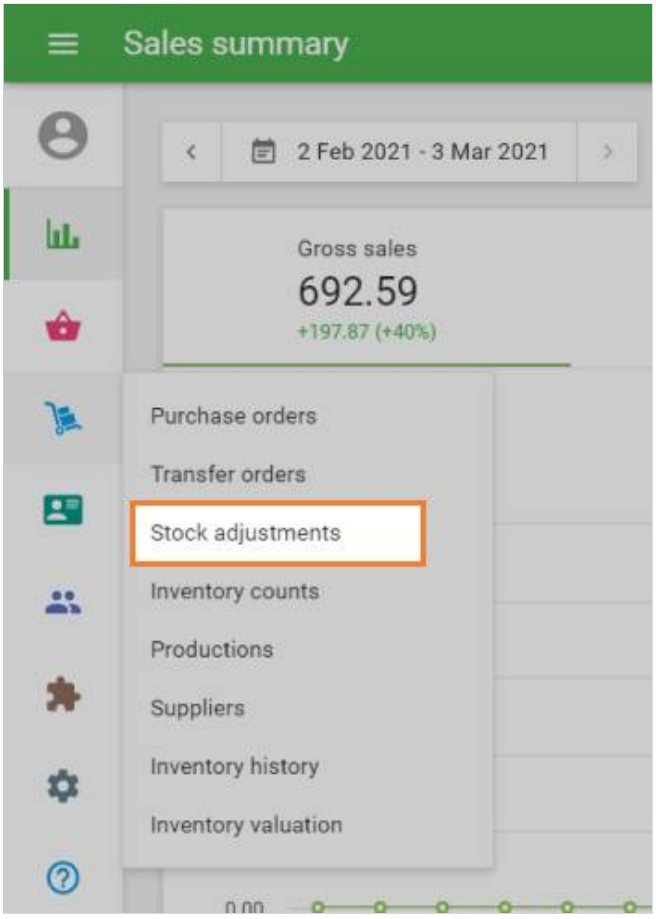
Video
https://www.youtube.com/watch?v=DziXpxqjikQ

Stock Adjustments allow you to modify the stock quantity of items and record the reason for each change.

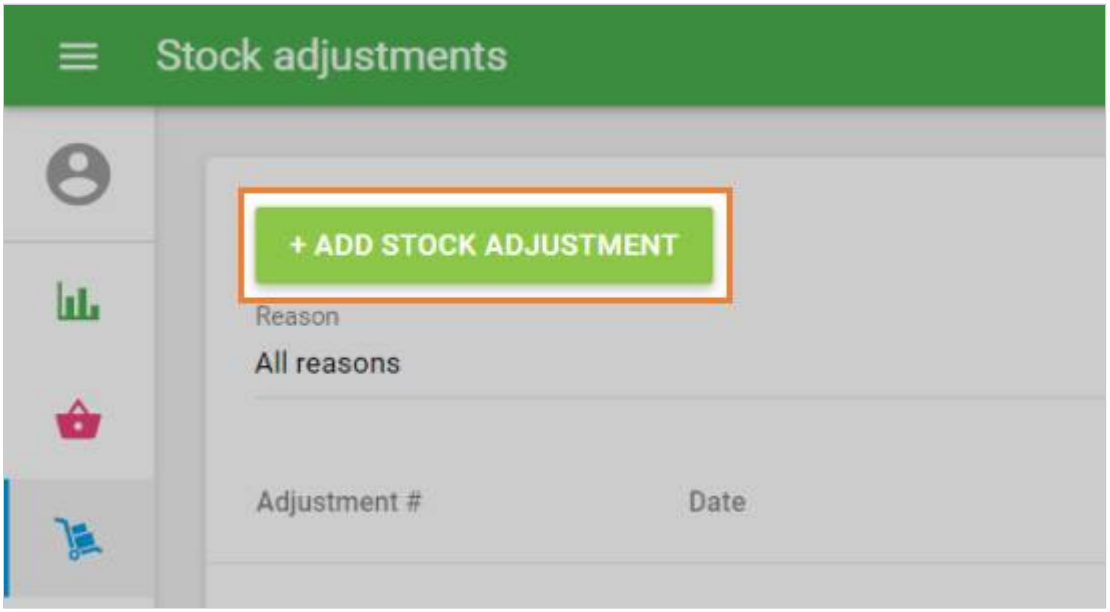
Note: Stock Adjustments are part of Advanced Inventory Management and require an active subscription. See Advanced Inventory Management Overview to learn how to activate it.

Creating a Stock Adjustment

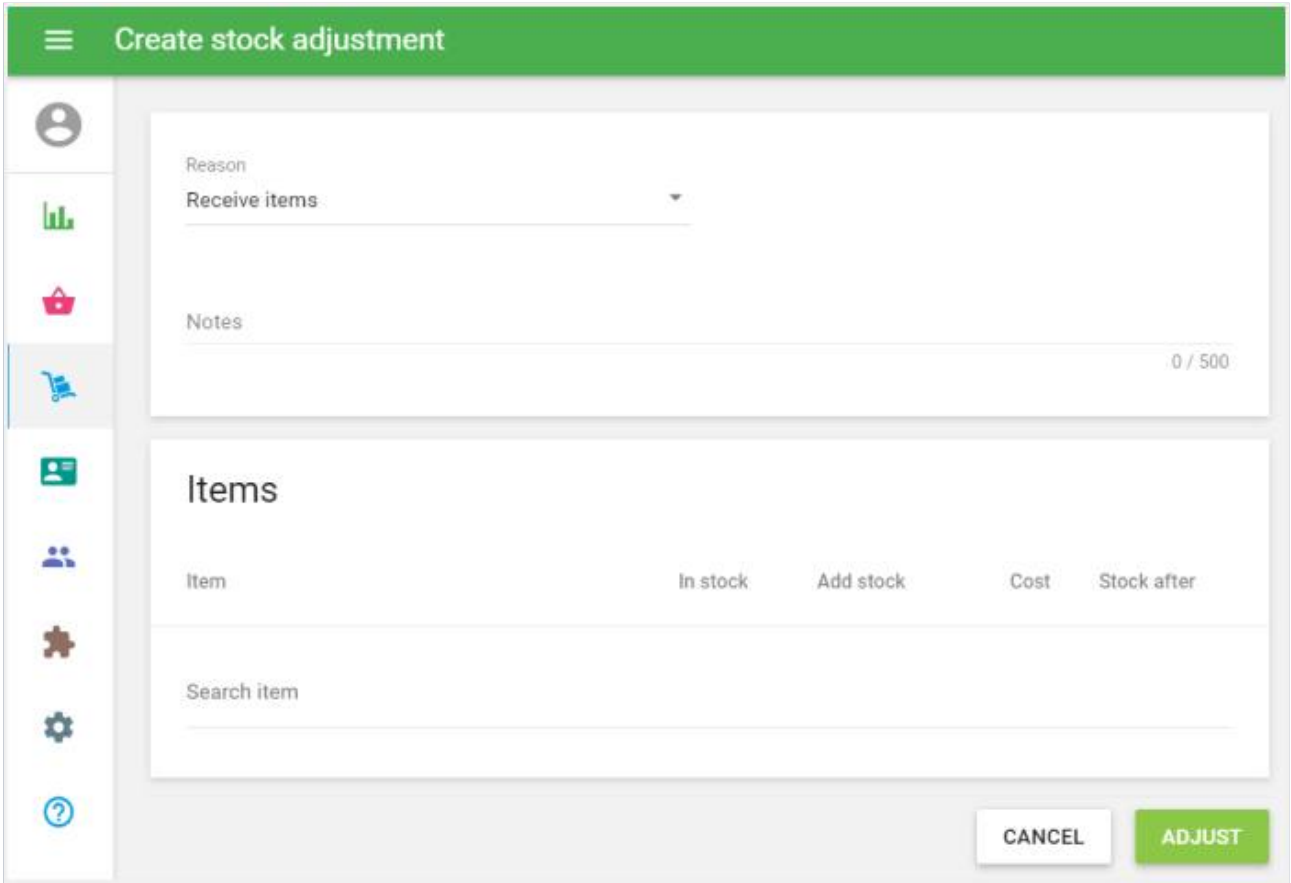
In the Back Office, go to **Inventory Management → Stock Adjustments**.



Click **+ Add Stock Adjustment**.



In the **Create Stock Adjustment** form:



- Select the **reason** for the adjustment from the drop-down menu.
- Select the store, if you have several ones.
- Optionally, add any relevant notes in the **Notes** field.

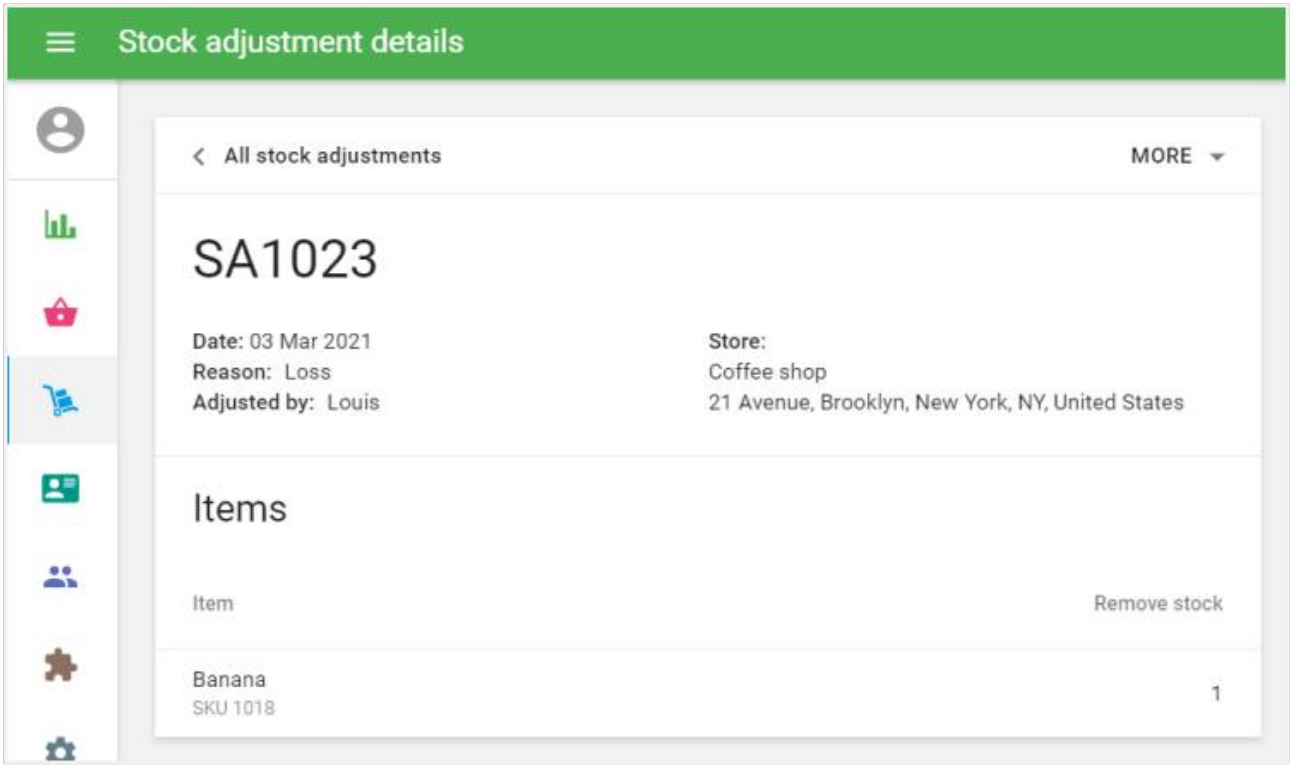
In the **Items** section, add the items you want to adjust.

Depending on the adjustment reason selected, fill in the relevant fields for each item:

Adjustment Reason	Field to Fill In
Receive Items	Add Stock and Cost
Inventory Recount	Counted Stock
Loss or Damaged	Remove Stock

Click **Adjust** to complete the adjustment.

Once confirmed, the stock levels for the adjusted items will be updated immediately, and you'll see the adjustment details on the screen.



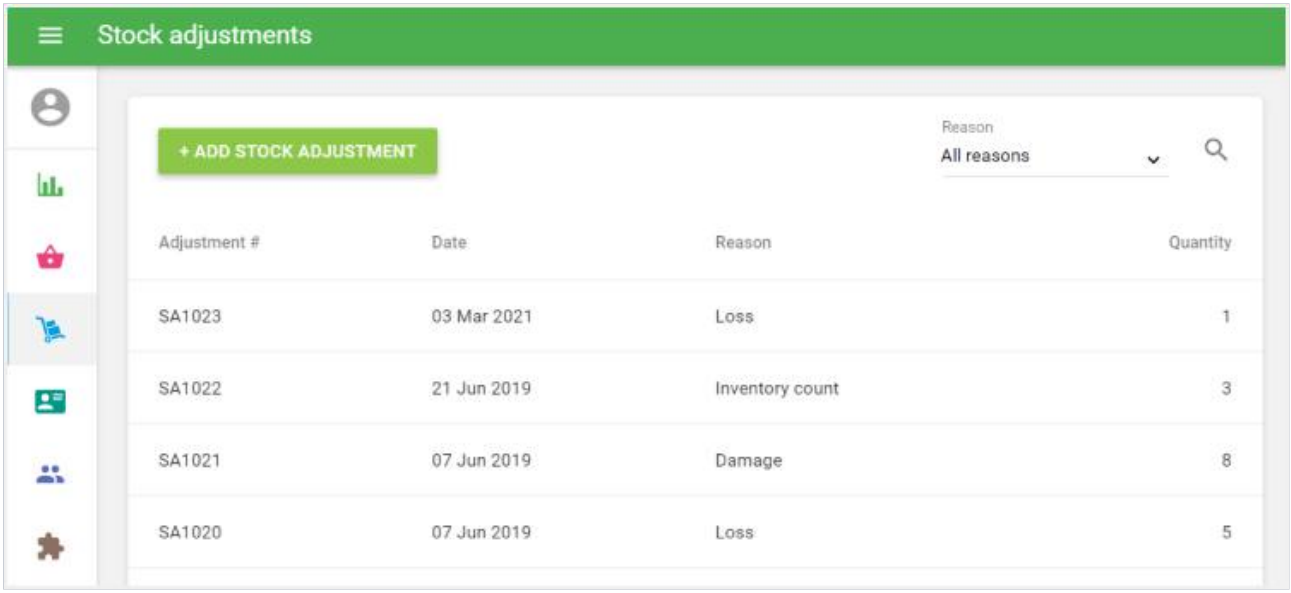
Exporting a Stock Adjustment

From the adjustment details page, click the **More** menu to export the document:

- **Save as PDF**
- **Save as CSV**

Viewing All Adjustments

All previously created stock adjustments are listed in the **Stock Adjustments** section under **Inventory Management**, giving you a full history of changes made to your inventory.



See also:

Advanced Inventory Management Overview

How to Work with Purchase Orders and Suppliers

How to Work with Transfer Orders

Inventory History and Valuation Report

How to Work with Inventory Count

Video
https://www.youtube.com/watch?v=0HBt0FKRENA

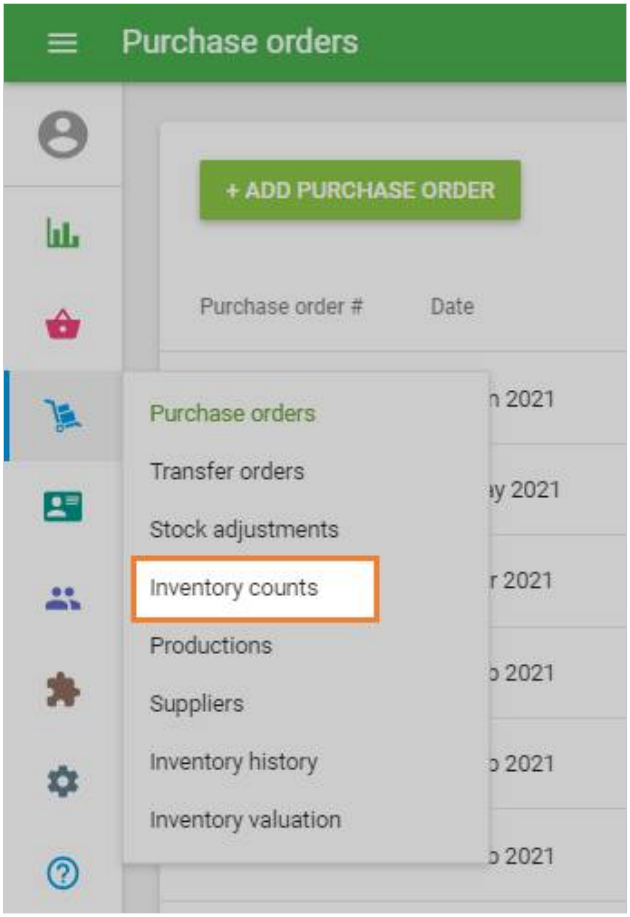
Inventory Count allows you to:

- Reconcile expected and actual inventory for all or selected items.
- Identify inventory loss or surplus.
- Keep a document record for each count.

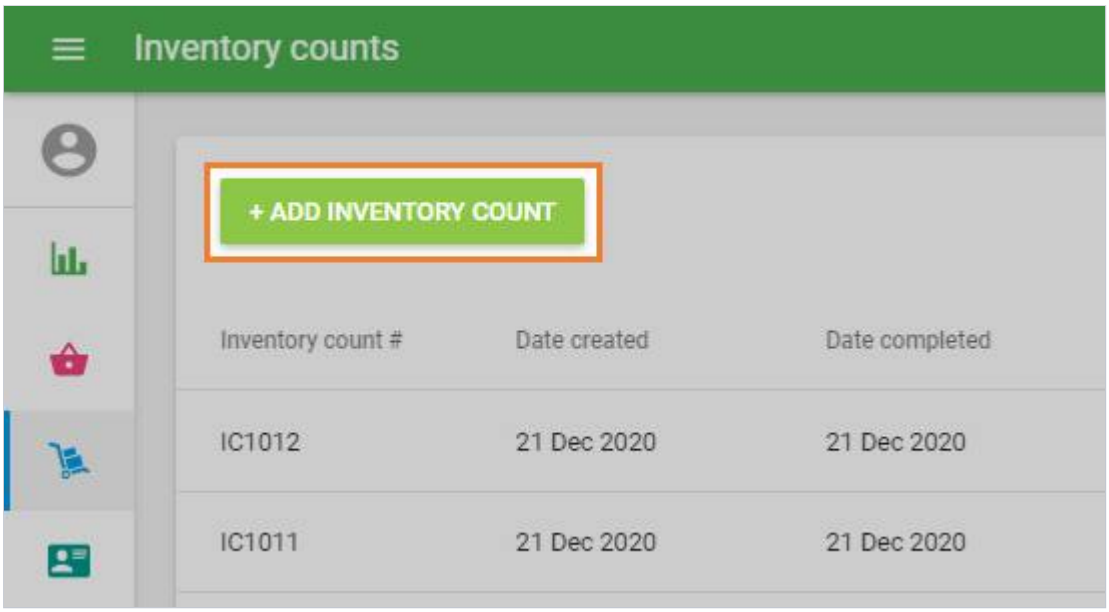
Note: Inventory Count is part of Advanced Inventory Management and requires an active subscription. See Advanced Inventory Management Overview to learn how to activate it.

Creating an Inventory Count

In the Back Office, go to **Inventory Management → Inventory Count**.

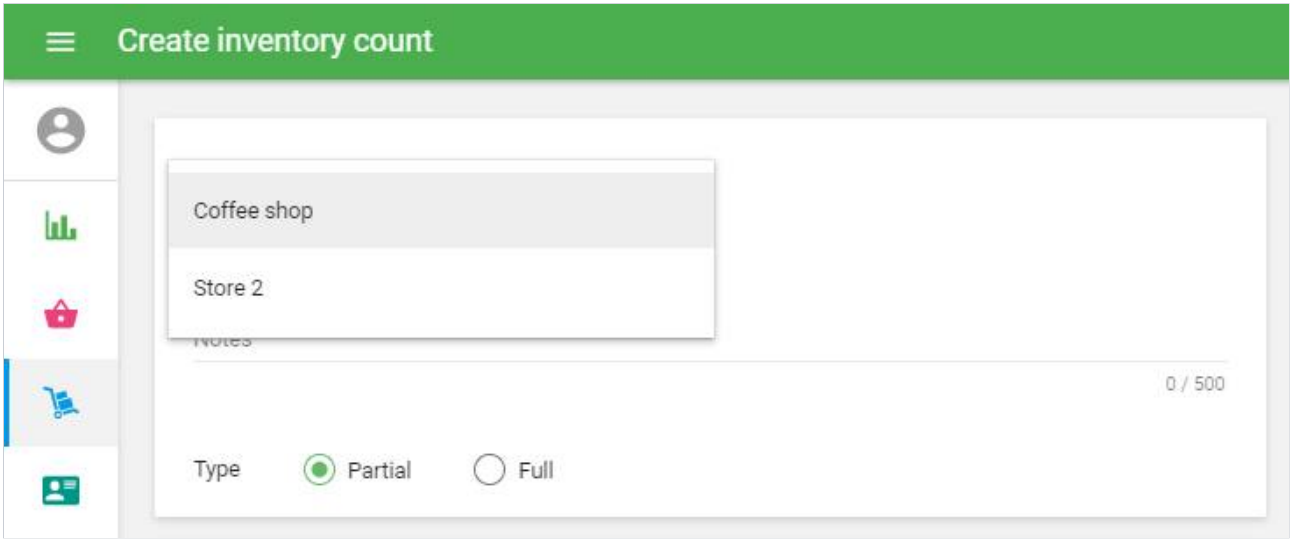


Click **+ Add Inventory Count**.

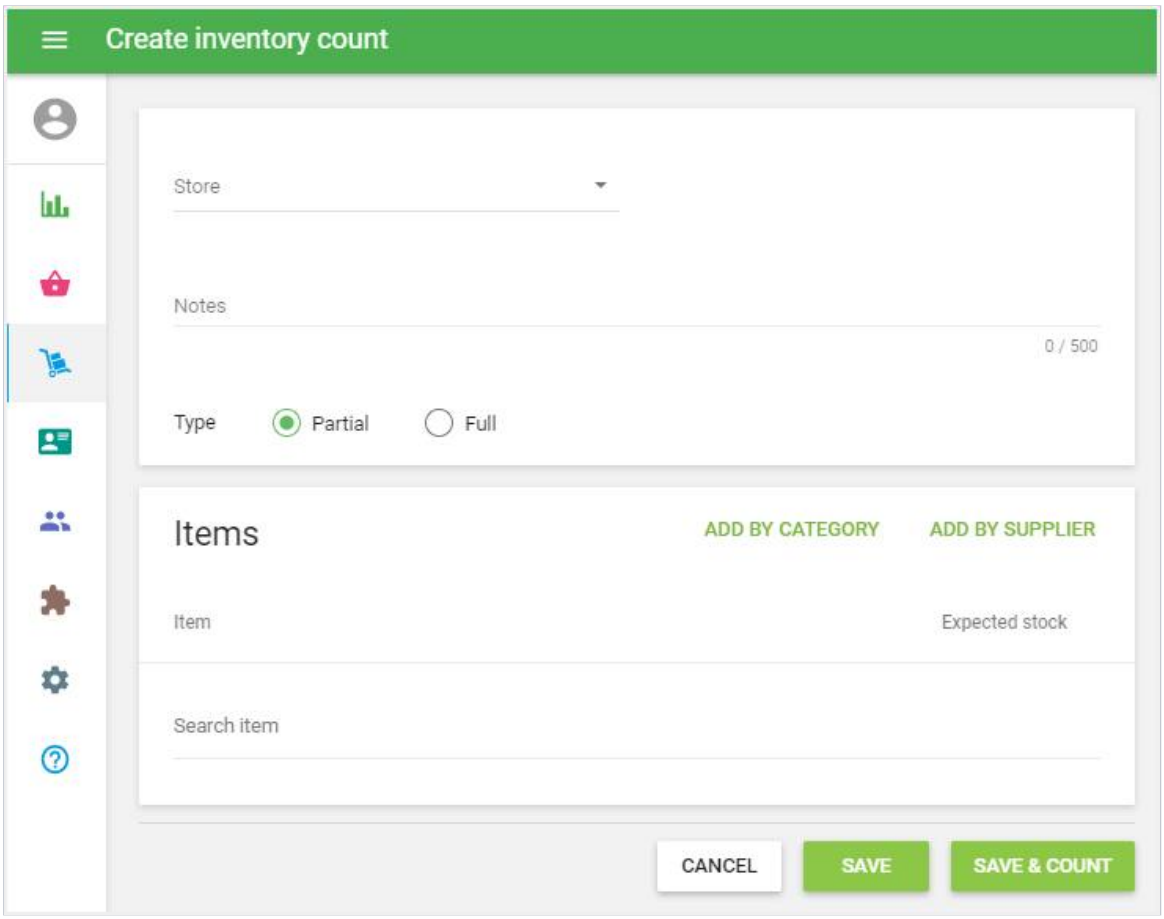


In the **Create Inventory Count** form:

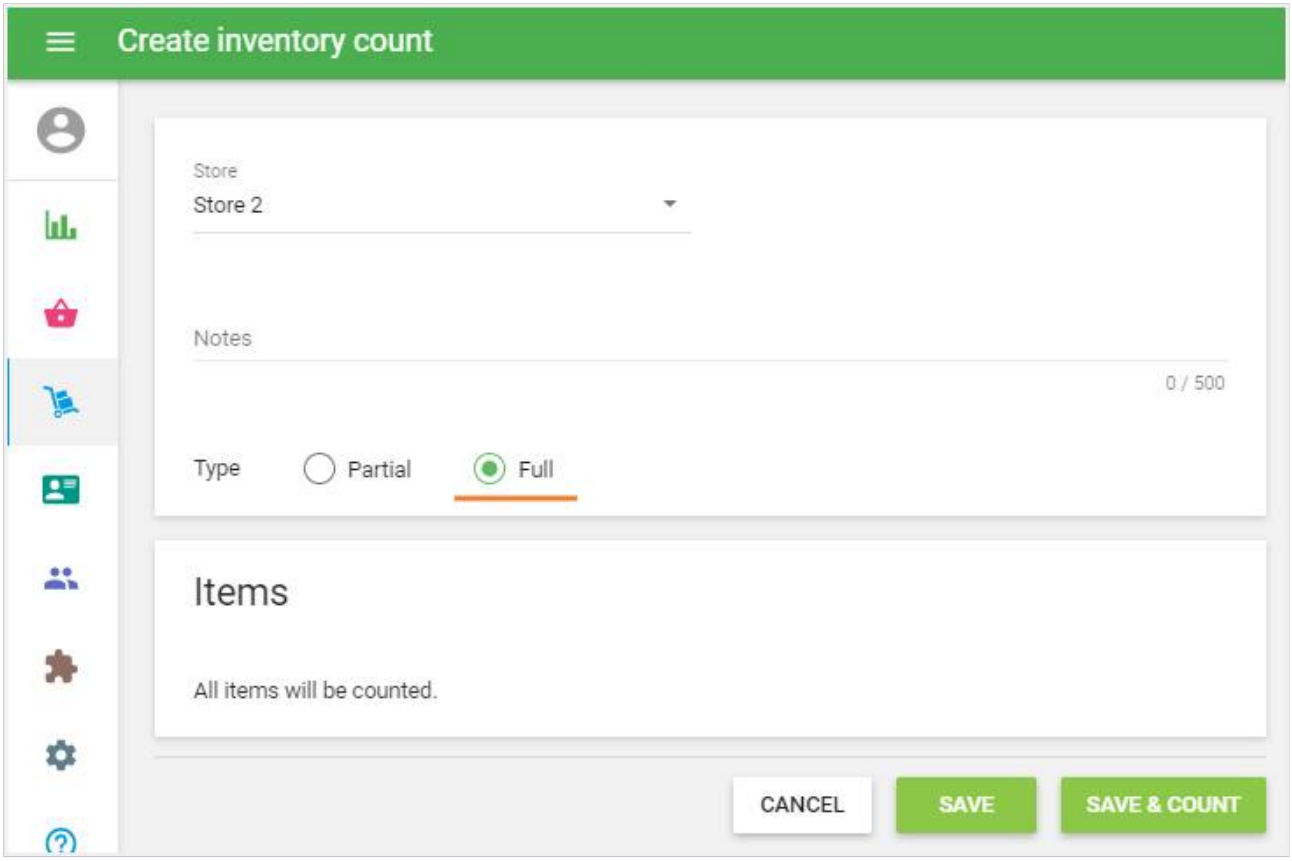
- Select the **store** where the count will take place.



- Optionally, add any relevant notes in the **Notes** field.



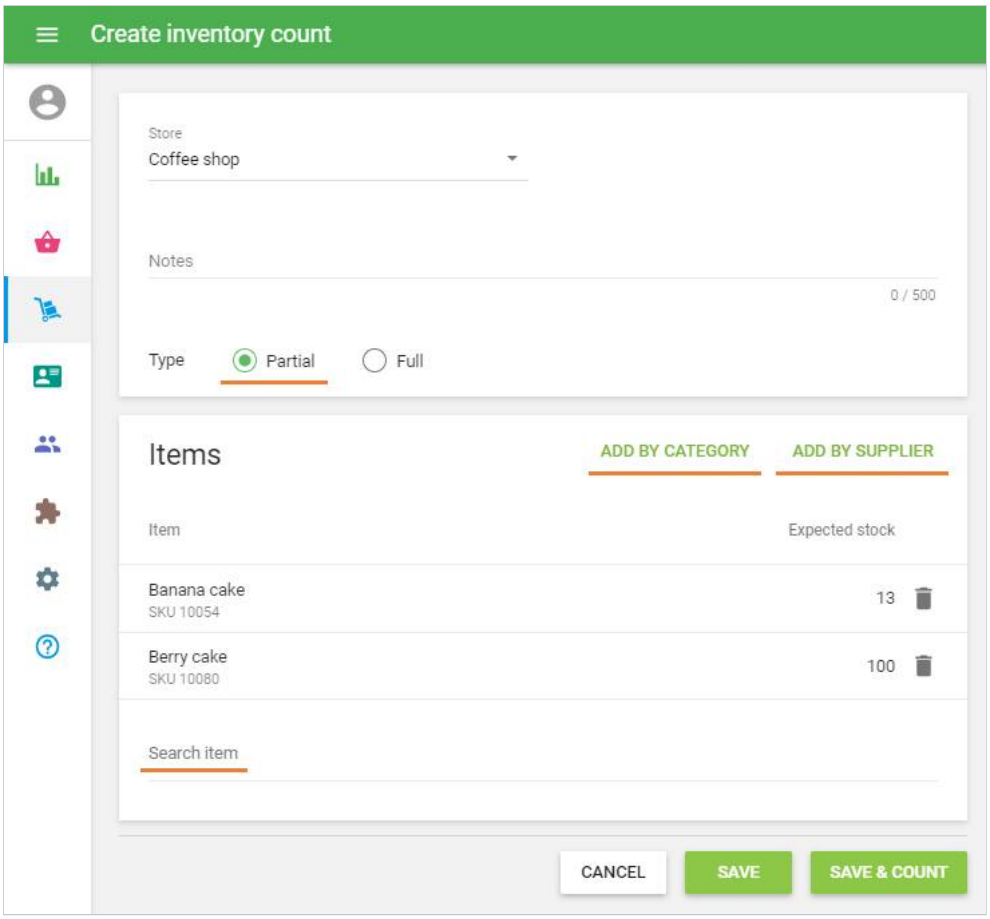
- Choose the count type: **Full** or **Partial**.



Full Inventory Count

All items with **Track Stock** enabled will be added to the document automatically — no manual item selection required.

Partial Inventory Count



Add items to the count manually using one of the following methods:

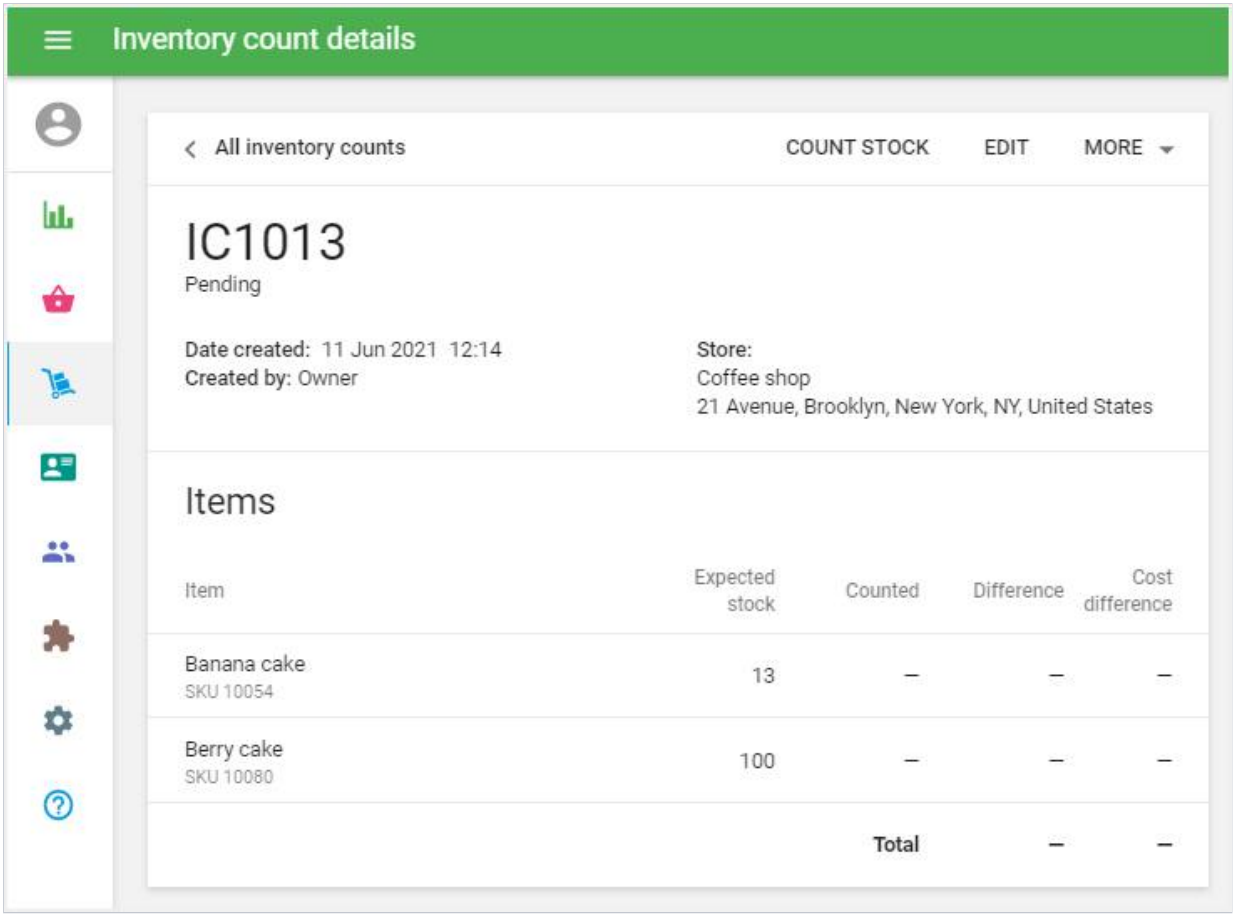
- **Search Item** field — Add items one by one.
- **Add by Category** — Add all items belonging to a specific category.
- **Add by Supplier** — Add all items assigned to a specific supplier.

Note: Composite items and items with **Track Stock** disabled will not appear in the list. If a product has variants, each variant is shown as a separate row.

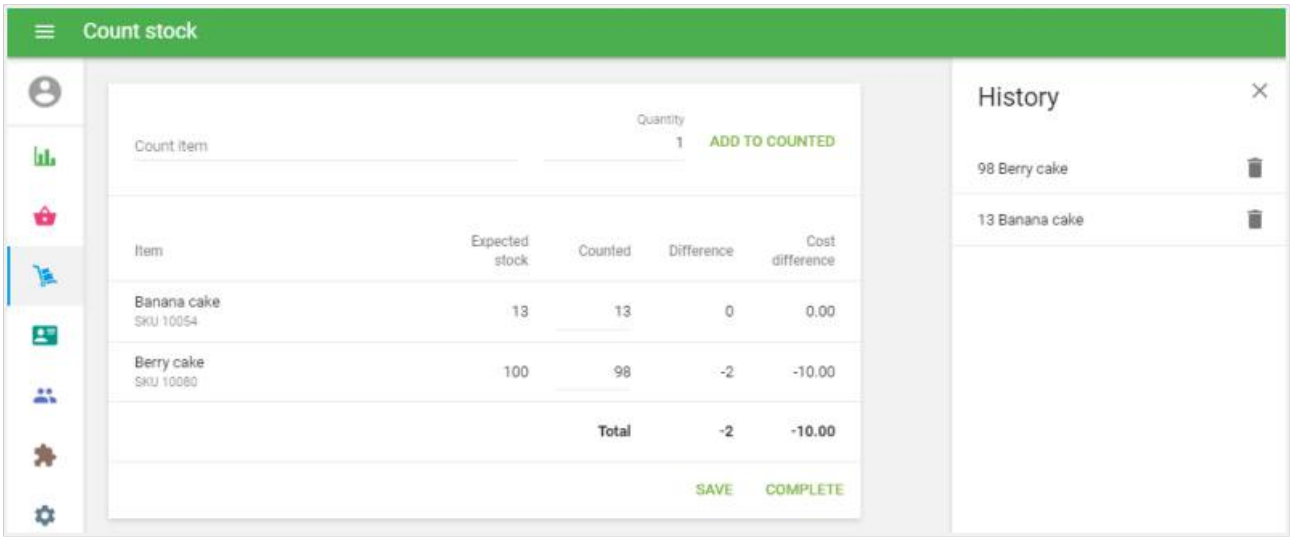
The **Expected Stock** column will show the current stock for each item in the selected store.

Click **Save** to create the inventory count document, or **Save & Count** to create it and begin counting immediately.

Counting Stock



Click the **Count Stock** button to start the counting process.



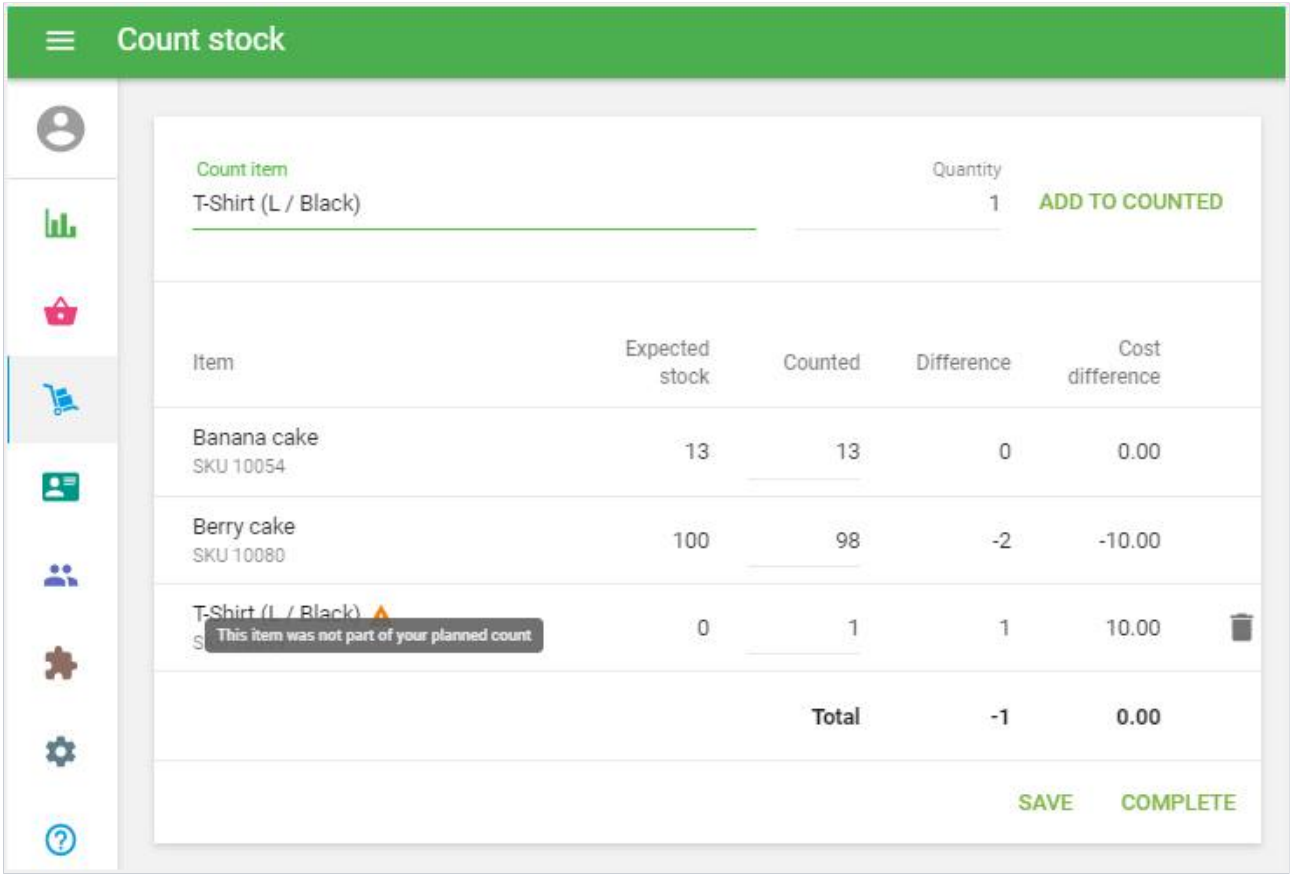
You can enter counted quantities in two ways:

Option 1 — Count Item field: Search for an item in the **Count Item** field, enter the quantity, and click **Add to Counted**. You can also use a barcode scanner — each scan adds one unit and is logged in the history. This is useful when counting in blocks: for example, you can scan a barcode 10 times or simply enter "10" in the **Quantity** field.

Option 2 — Counted column: Enter the quantity directly in the **Counted** column of the item list.

Items Not in the Count List

If you add an item that was not part of the planned count (by typing or scanning), the system will flag it with a yellow warning: "This item was not part of your planned count." You can delete it or proceed.

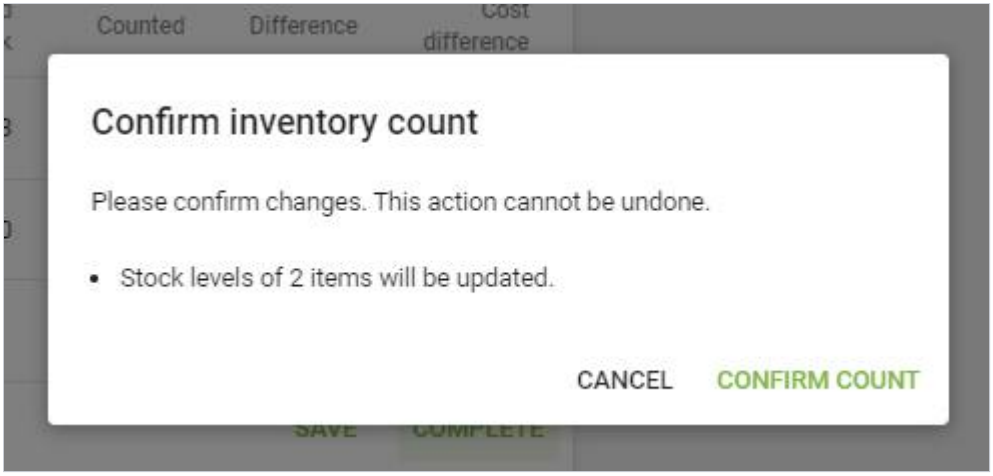


Autosave and History

- The system **automatically saves** your count every 30 seconds to prevent data loss.
- A **change history** is displayed on the right side of the screen, allowing you to cancel any incorrect entries at any time.

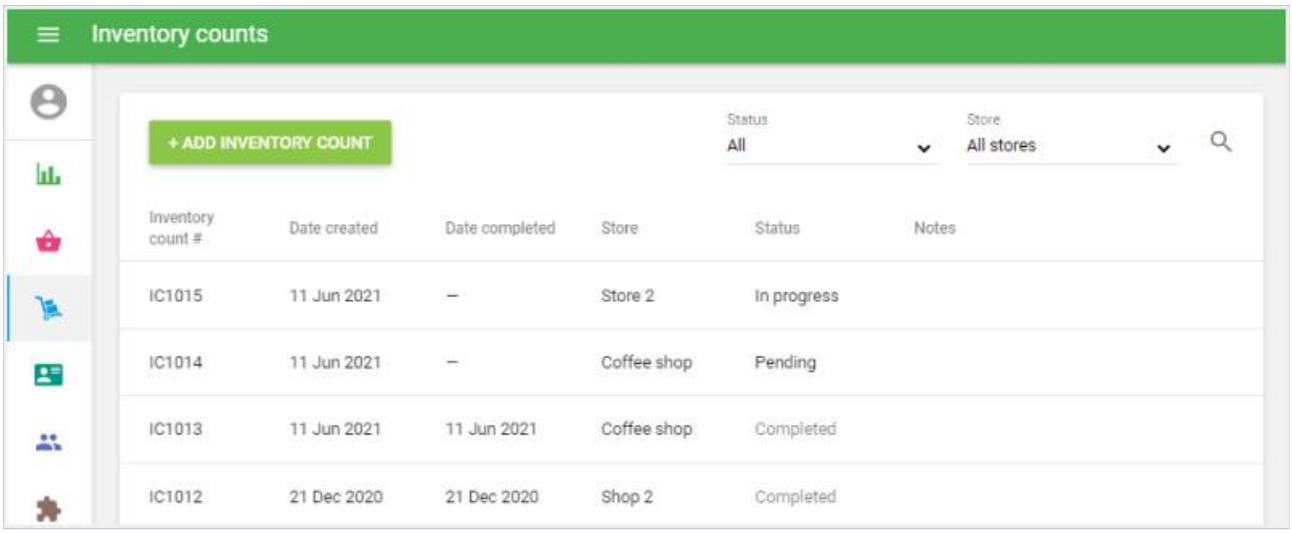
Completing the Count

- Click **Save** to save your progress and continue the count later.
- Click **Complete** to open the **Confirm Inventory Count** window, then click **Confirm Count** to finish.



Once confirmed, the stock levels of all counted items will be updated accordingly.

Inventory Count Statuses



Status	Meaning
Pending	Count document created, but counting has not started.
In Progress	Counting has begun but not yet completed.
Completed	Count has been confirmed and stock levels updated.

See also:

Advanced Inventory Management Overview

How to Work with Purchase Orders and Suppliers

How to Work with Transfer Orders

How to Work with Stock Adjustments

Inventory History and Valuation Report

How to Print Labels for Items

How to Work with Additional Costs in the Purchase Orders

How to Work with Production

Video
https://www.youtube.com/watch?v=zX0bWG1XIv0

The **Production** feature allows you to track the inventory of finished (produced) items separately from their components. This is particularly useful for items prepared in advance rather than made to order — for example, baked goods in a bakery. Produced items can be moved between stores, and their inventory can be adjusted and counted.

Note: Production is part of Advanced Inventory Management and requires an active subscription. See Advanced Inventory Management Overview to learn how to activate it.

Enabling Production on a Composite Item

Production is only available for **composite items**.

1. Open an existing composite item for editing, or create a new one.
2. In the **Inventory** section, enable the **Use Production** toggle.
3. Once enabled, the **In stock**, **Low stock,** and **Optimal stock** fields will appear. You can set these values manually for the composite item — this will not affect the stock of its ingredients.
4. Click **Save**.

From this point on, the stock of the composite item's ingredients will change when a **Production** or **Disassembly** document is created (see below). When the item is sold, only the composite item's stock is reduced — not its ingredients.

Creating a Production

1. In the Back Office, go to **Inventory Management → Production**.
2. Click **+ Add Production**.

3. In the **Create Production** form:
   Select the **store** where the production is taking place.
   Optionally, add any relevant notes in the **Notes** field.

4. In the **Items** section, search for and add the composite items you want to produce. You can search by item name, SKU, or barcode. For each item:
   Cost — Automatically calculated based on the cost of the item's components.
   Quantity — Enter the number of units you want to produce.

5. Repeat step 4 to add more items.

6. Click **Save** to create the production document.

Once saved, the following updates occur automatically:

- The stock of the **produced composite items** increases by the specified quantity.
- The stock of the **components** decreases based on their usage in the produced items.
- The **average cost** of each produced composite item is recalculated.

Managing a Production Document

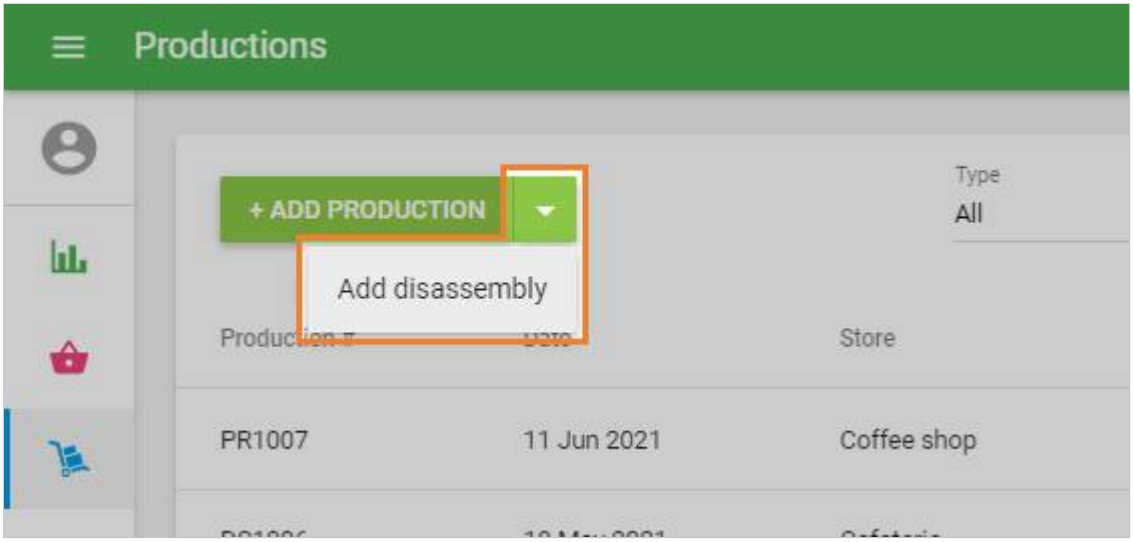
From the production document, the **More** menu offers the following options:

Action	Description
Save as PDF	Download the production document as a PDF file.
Save as CSV	Export the production data as a CSV file.
Duplicate	Create a copy of the production document.
Print Labels	Print labels for the items in the production document.

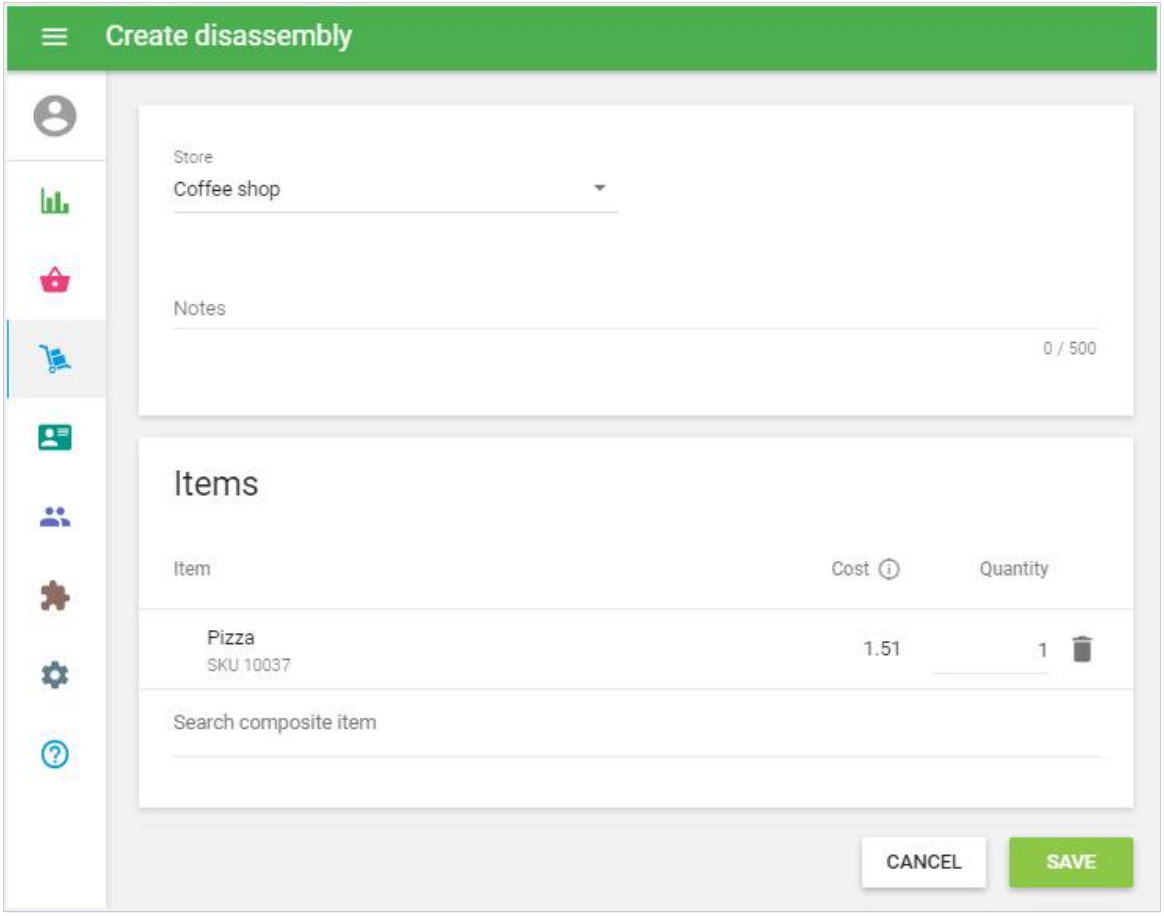
Disassembling a Produced Item

If you need to reverse a production and return the components to stock, you can create a **Disassembly**:

Go to the **Productions** list.
Click the **down arrow** next to the + Add production button and select **Add Disassembly**.



Fill in the **Create Disassembly** form in the same way as a production.



Click **Save**.

Once saved, the following updates occur automatically:

- The stock of the **disassembled composite items** decreases by the specified quantity.
- The stock of the **components** increases based on their usage in the composite items.
- The **cost of the components** is recalculated.

See also:

Advanced Inventory Management Overview

How to Work with Purchase Orders and Suppliers

How to Work with Transfer Orders

How to Work with Stock Adjustments

Inventory History and Valuation Report

How to Work with Inventory Count

How to Print Labels for Items

How to Work with Additional Costs in the Purchase Orders

What is Inventory History



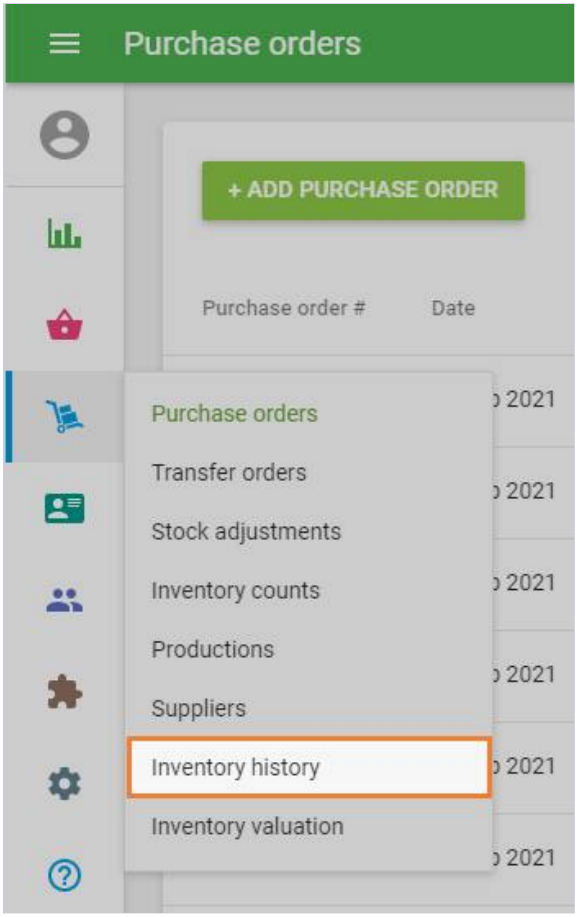
Video
https://www.youtube.com/watch?v=nILPYfKwUPU

Inventory History gives you a complete record of all stock changes across your business, including transfers, purchase orders, adjustments, sales, refunds, and more.

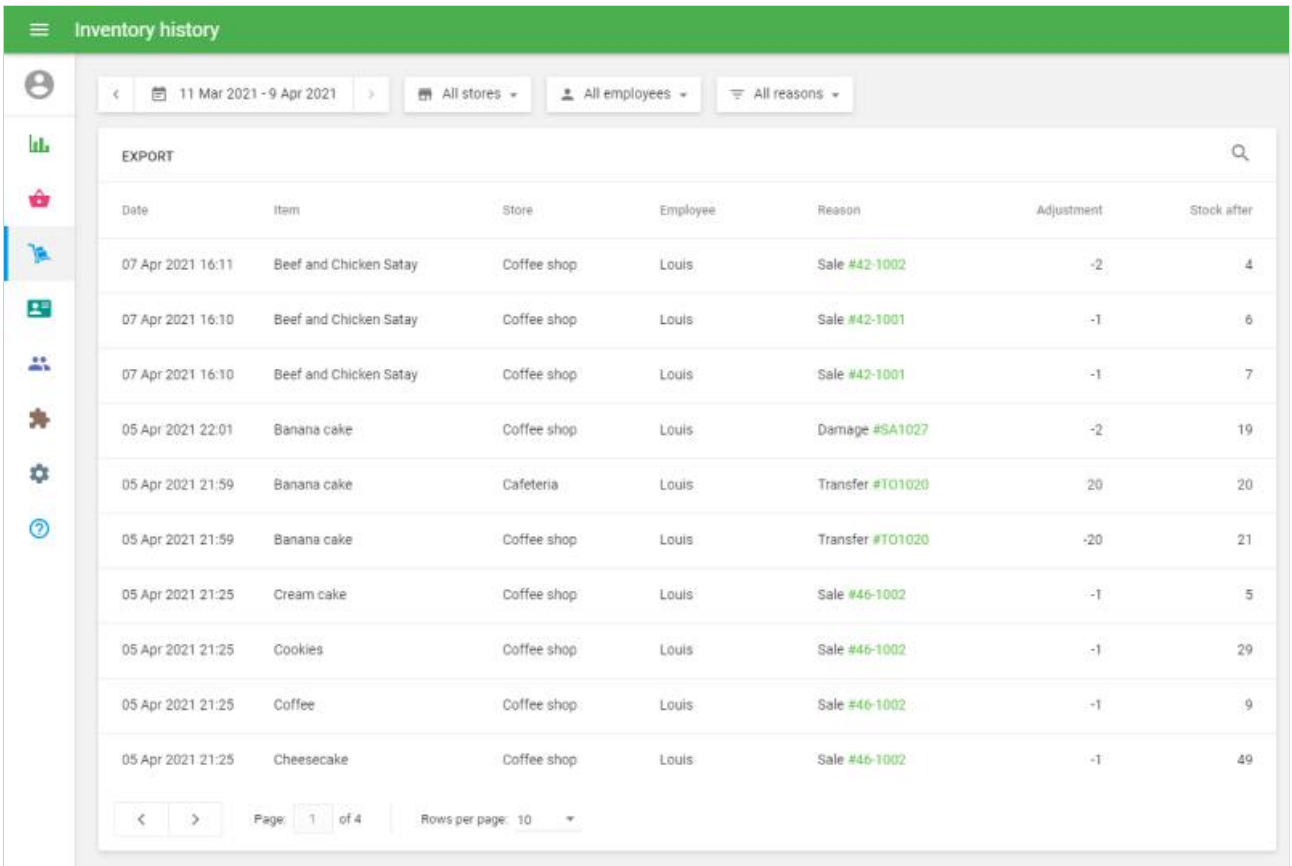
Note: Inventory History is part of Advanced Inventory Management and requires an active subscription. See Advanced Inventory Management Overview to learn how to activate it.

Viewing the Full Inventory History

In the Back Office, go to **Inventory Management → Inventory History**.



Here you'll see a log of all stock changes for every item with the **Track Stock** option enabled.



Filtering the History

You can narrow down the list using the following filters:

- **Period** — View changes within a specific date range.
- **Store** — Filter by one or more store locations.
- **Employee** — Filter by the employee who made the change.
- **Reason** — Filter by the type of change, such as sales, refunds, adjustments, transfers, or purchase orders.

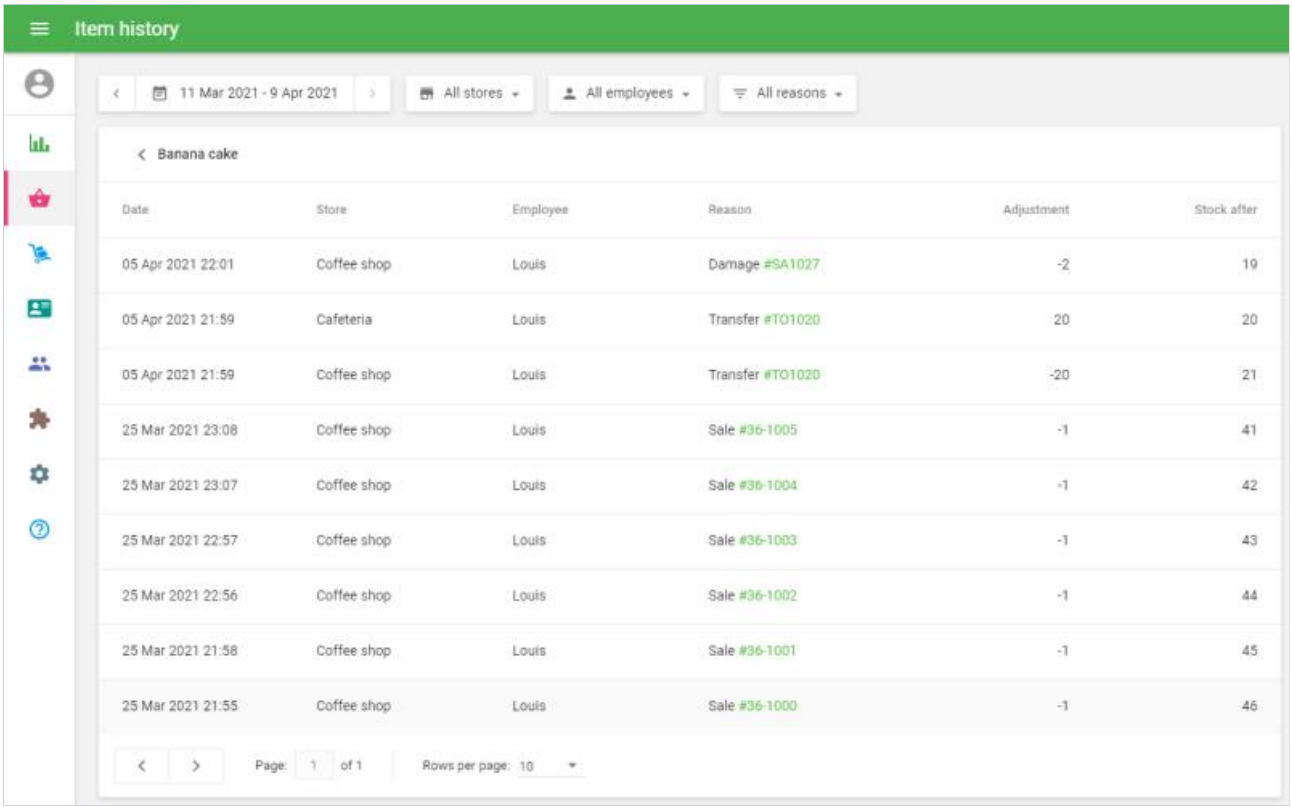
For all stock changes except **Item edit**, the **Reason** column includes a direct link to the original document for easy reference.

Viewing Stock History for a Single Item

You can also view the stock change history for a specific item directly from its item form:

1. Open the item for editing.
2. Click the View History button.

This will display a log of all stock changes for that item only.



See also:

Advanced Inventory Management Overview

How to Work with Purchase Orders and Suppliers

How to Work with Transfer Orders

How to Work with Stock Adjustments

Inventory Valuation Report

What is Inventory Valuation Report



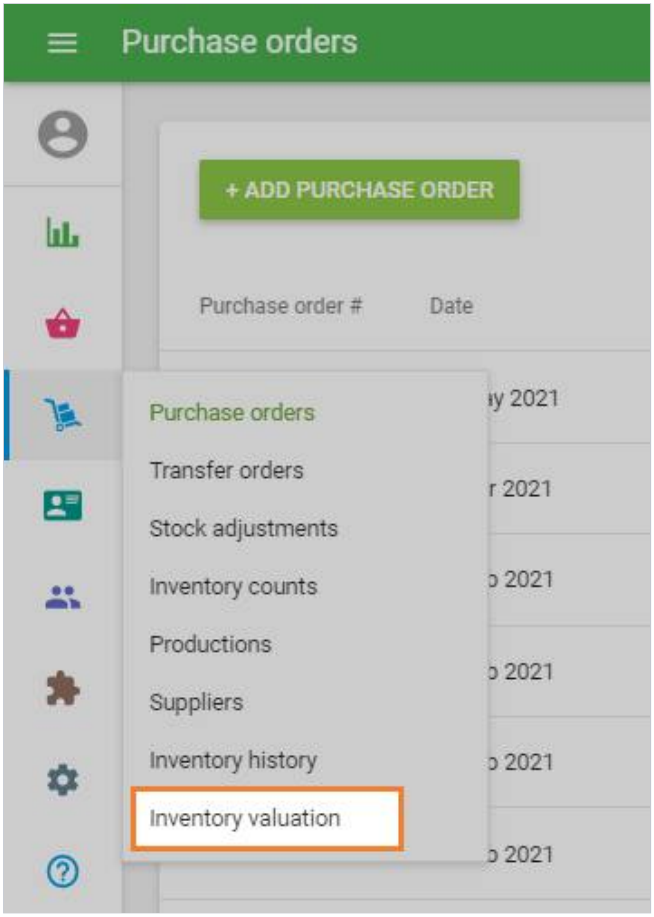
Video
https://www.youtube.com/watch?v=nILPYfKwUPU

The **Inventory Valuation Report** gives you a clear picture of the total cost of your current inventory and the potential profit from selling it.

Note: The Inventory Valuation Report is part of Advanced Inventory Management and requires an active subscription. See Advanced Inventory Management Overview to learn how to activate it.

Accessing the Report

In the Back Office, go to **Inventory Management → Inventory Valuation**.



The report reflects up-to-date inventory data. You can:

- **Select** the previous day to check the inventory values for the end of that day.
- **Filter** by category or store (for multi-store accounts).
- **Export** the data using the **Export** button at the top of the page.

Summary Metrics

At the top of the report, you'll find a summary of key inventory figures:

Metric	How It's Calculated
Total Inventory Value	Sum of (Cost × Stock) for all items
Total Retail Value	Sum of (Price × Stock) for all items
Potential Profit	Total Retail Value – Total Inventory Value
Margin	Potential Profit ÷ Total Retail Value (as a percentage)

Note:

- Items with **negative stock** are excluded from the **Total Inventory Value**.
- Items with **negative stock** or a **variable price** (blank price field) are excluded from the **Total Retail Value** and **Potential Profit**.

Detailed Breakdown

Below the summary, the report provides inventory values in a detailed, line-by-line view of each item in your inventory.

See also:

Advanced Inventory Management Overview

How to Work with Purchase Orders and Suppliers

How to Work with Transfer Orders

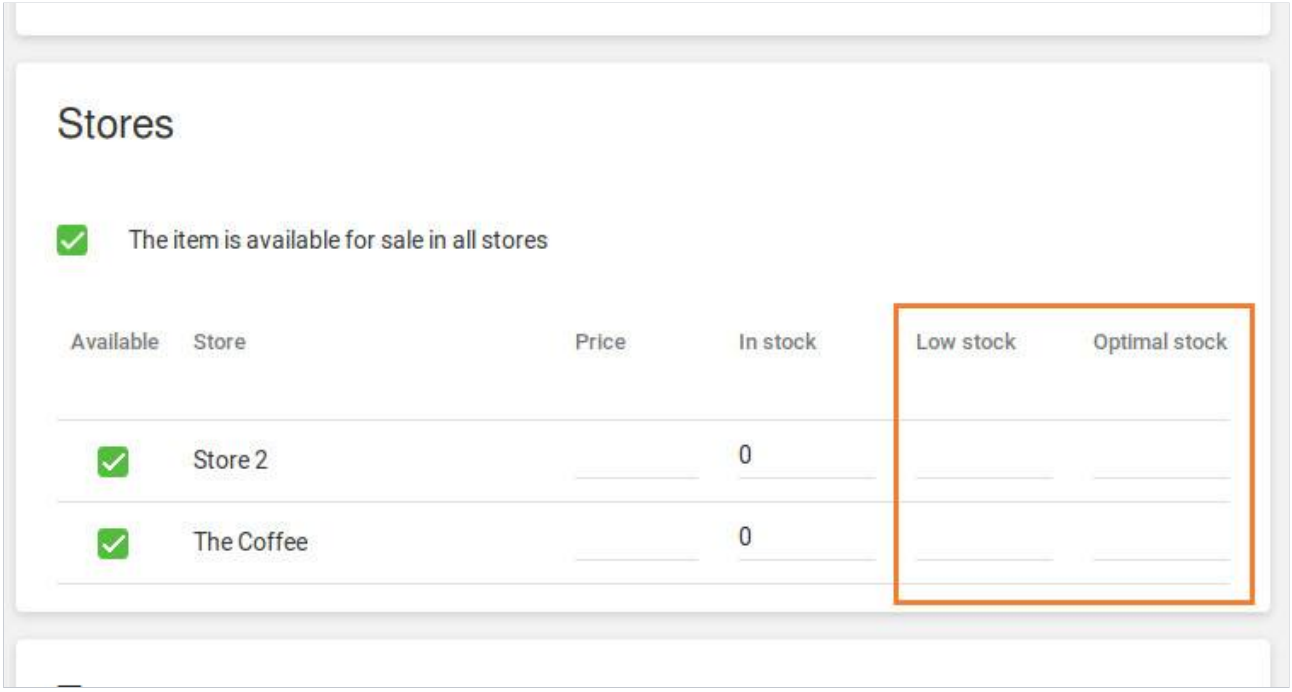
How to Work with Stock Adjustments

Autofill of the Items in the Purchase Order

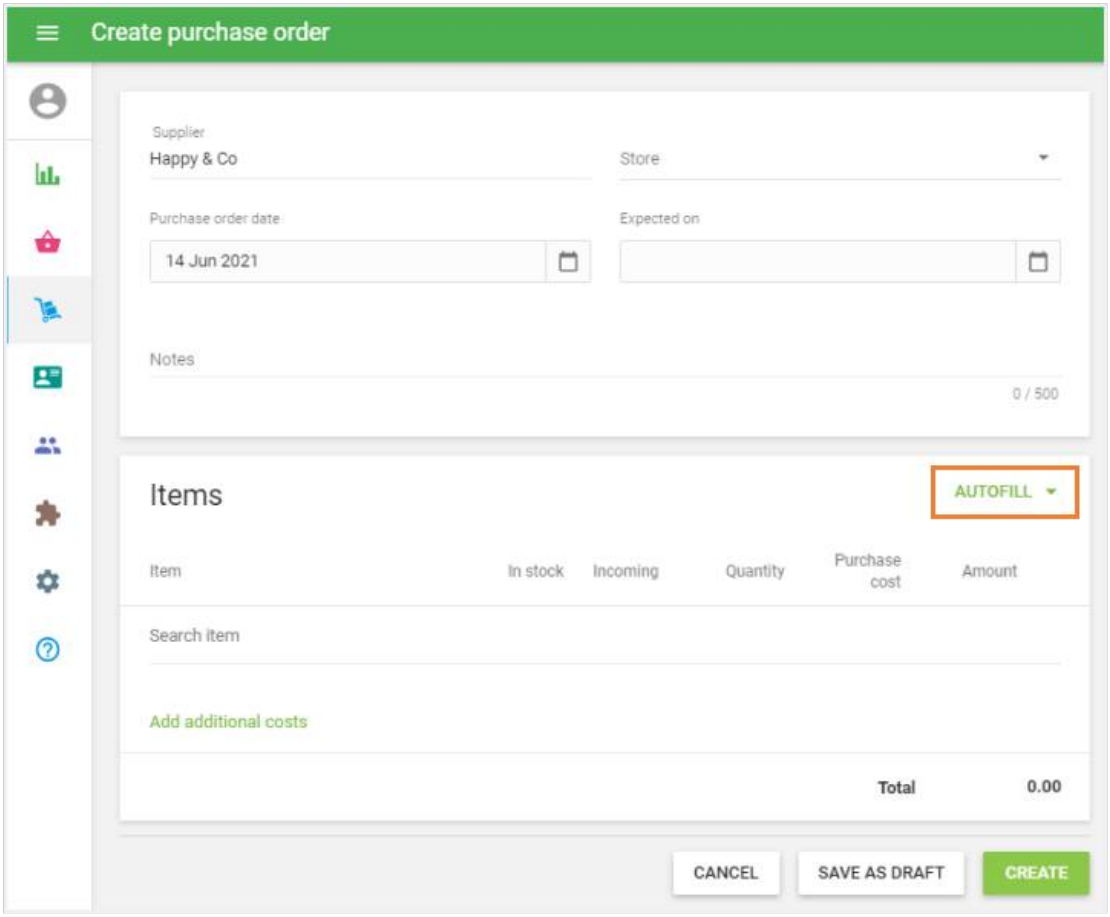
Video
https://www.youtube.com/watch?v=2_7iJdeMWTs

The autofill option allows you to add items to the purchase order in one click.

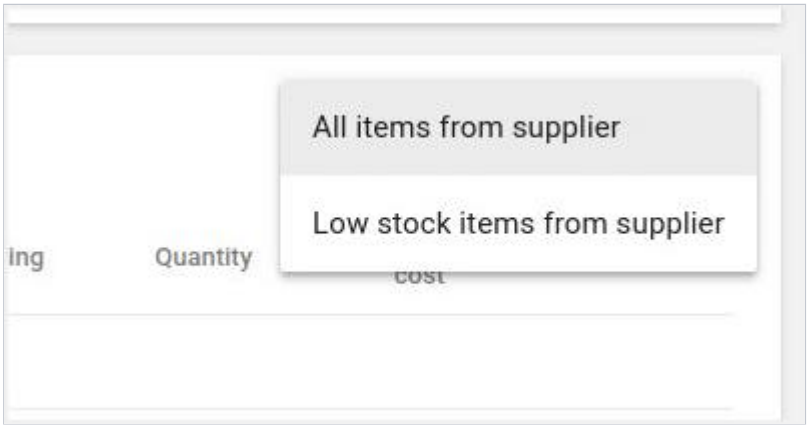
In the Items form, fill in the 'Low stock' and 'Optimal stock' fields.



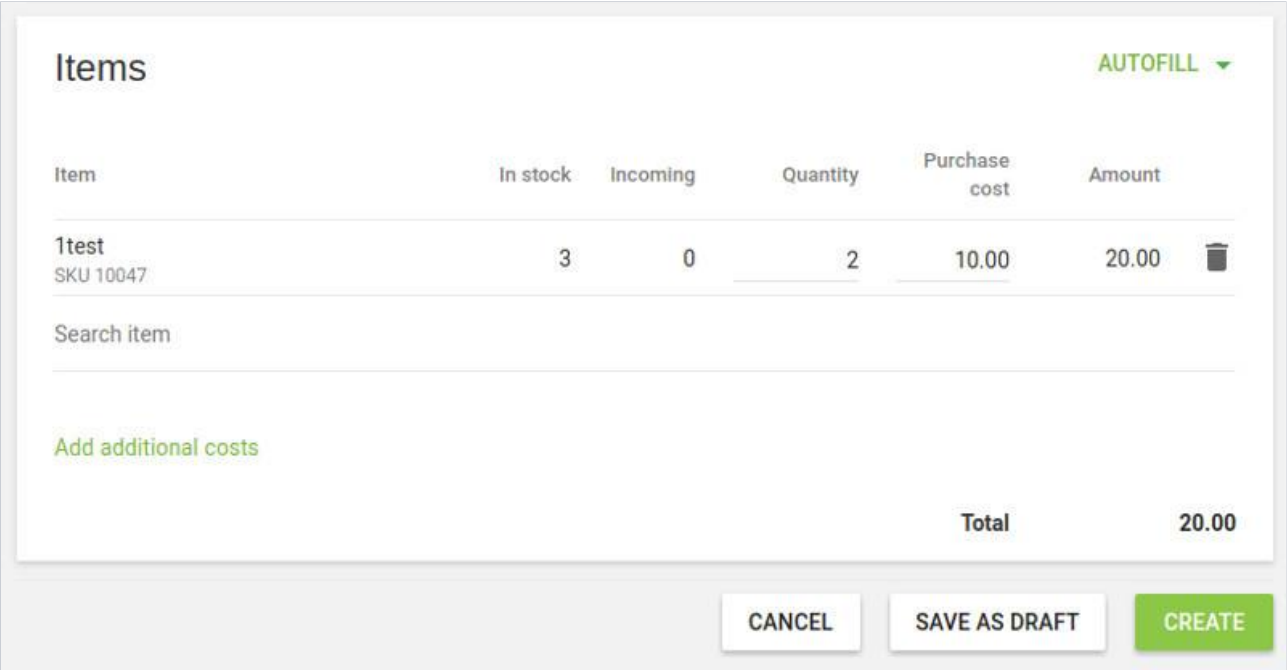
Open for editing the existing purchase order or create new.



After selecting the Supplier and Store for your Purchase order, you can choose one of the autofill options between 'All items from supplier' or 'Low stock items from supplier'.



If you select the 'All items from supplier', the system adds all the items with the selected supplier specified in their attributes.
If you select the 'Low stock items from supplier', the system adds all the items with the selected supplier specified in their attributes which have a stock value that is less or equal to its 'Low stock' value.



The quantity field will be filled in with the default value, calculated by the formula:

Quantity = Optimal stock - In stock - Incoming

Optimal stock - the value of optimal stock set at the item's form in the selected store.
In stock - the current stock of the item in the selected store.
Incoming - the quantity of items that are expected at the selected store (the quantity of items not received in other purchase orders with the statuses "Expected", "Partially received", and transfer orders with the status "In transit").

For items whose 'Optimal stock' is blank, the 'Quantity' field will be empty.

You can change the default quantity with your value and proceed further with the purchase order.

See also:

How to Work with Purchase Orders and Suppliers

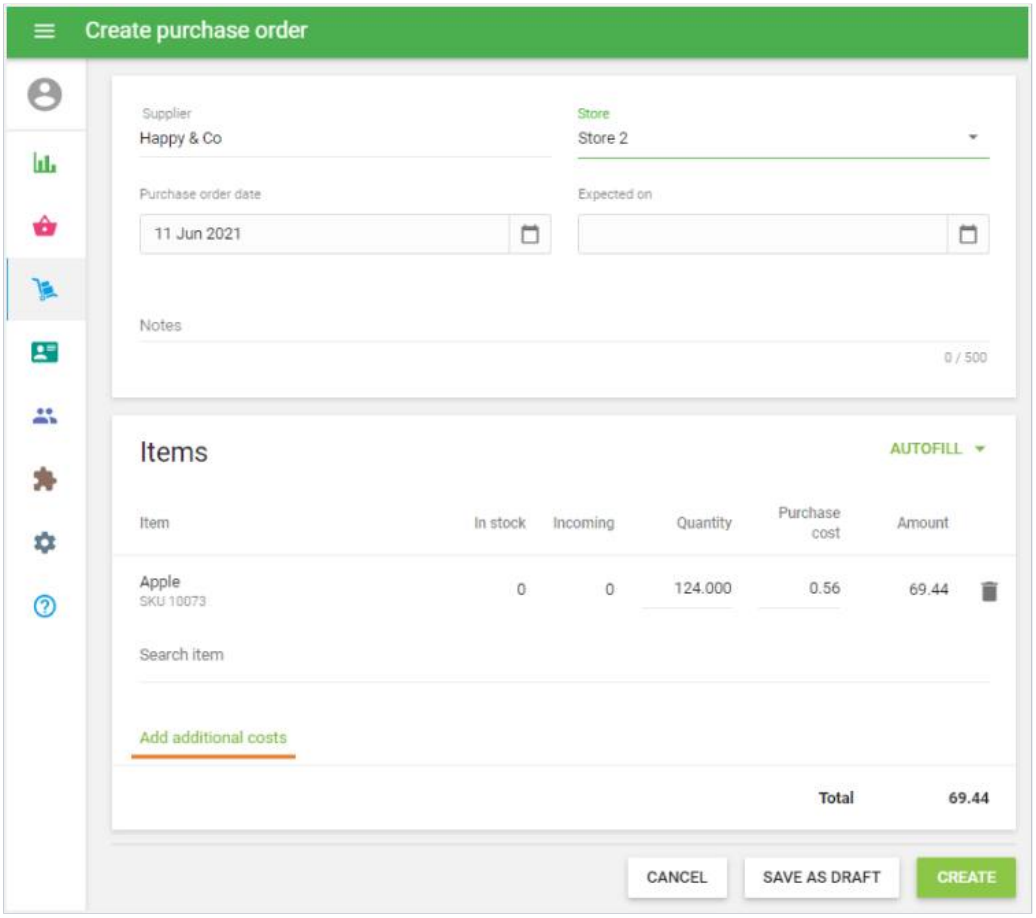
How to Work with Additional Costs in the Purchase Orders

Video
https://www.youtube.com/watch?v=2_7iJdeMWTs

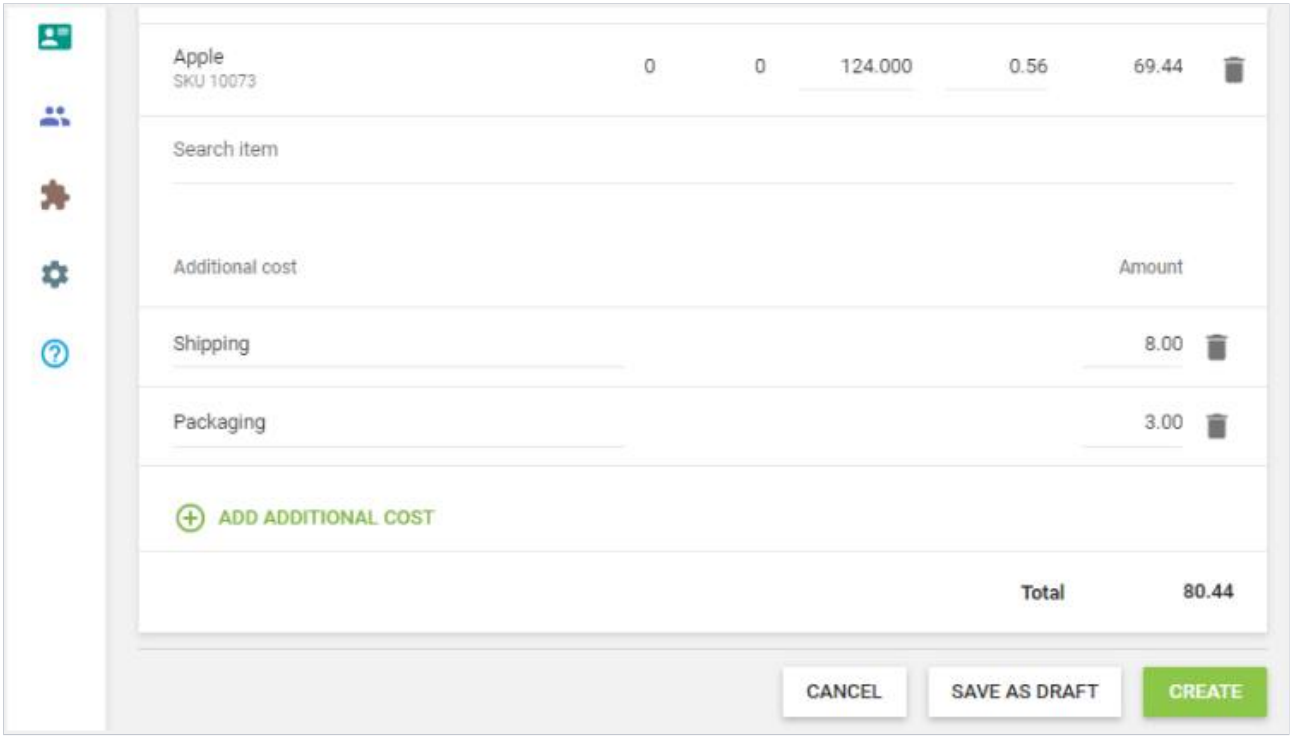
When making purchases, retailers often incur expenses beyond the item costs — such as shipping, packaging, customs fees, and more. The **Additional Costs** (also called landed costs) feature lets you include these expenses in the final cost of goods, resulting in more accurate inventory valuation and profitability calculations.

Adding Additional Costs to a Purchase Order

Open an existing purchase order for editing, or create a new one.
Click **Add Additional Costs** at the bottom of the order.



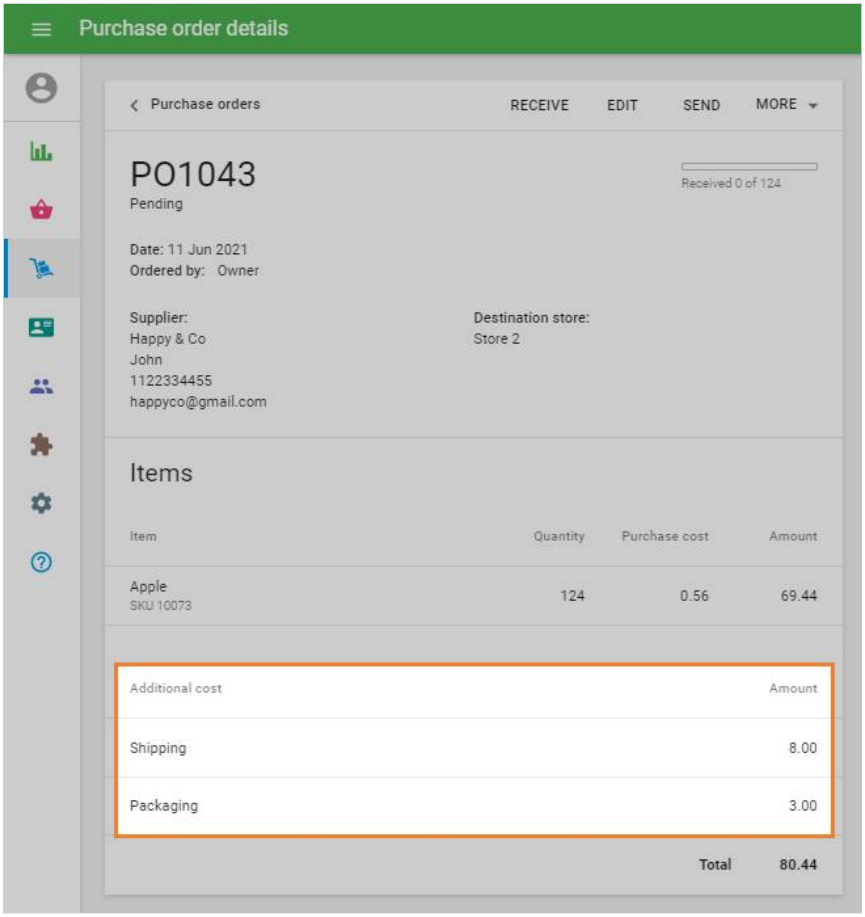
Fill in the **Additional Cost** name and **Amount**.



- The amount can be a negative value if you are receiving a discount from your supplier.

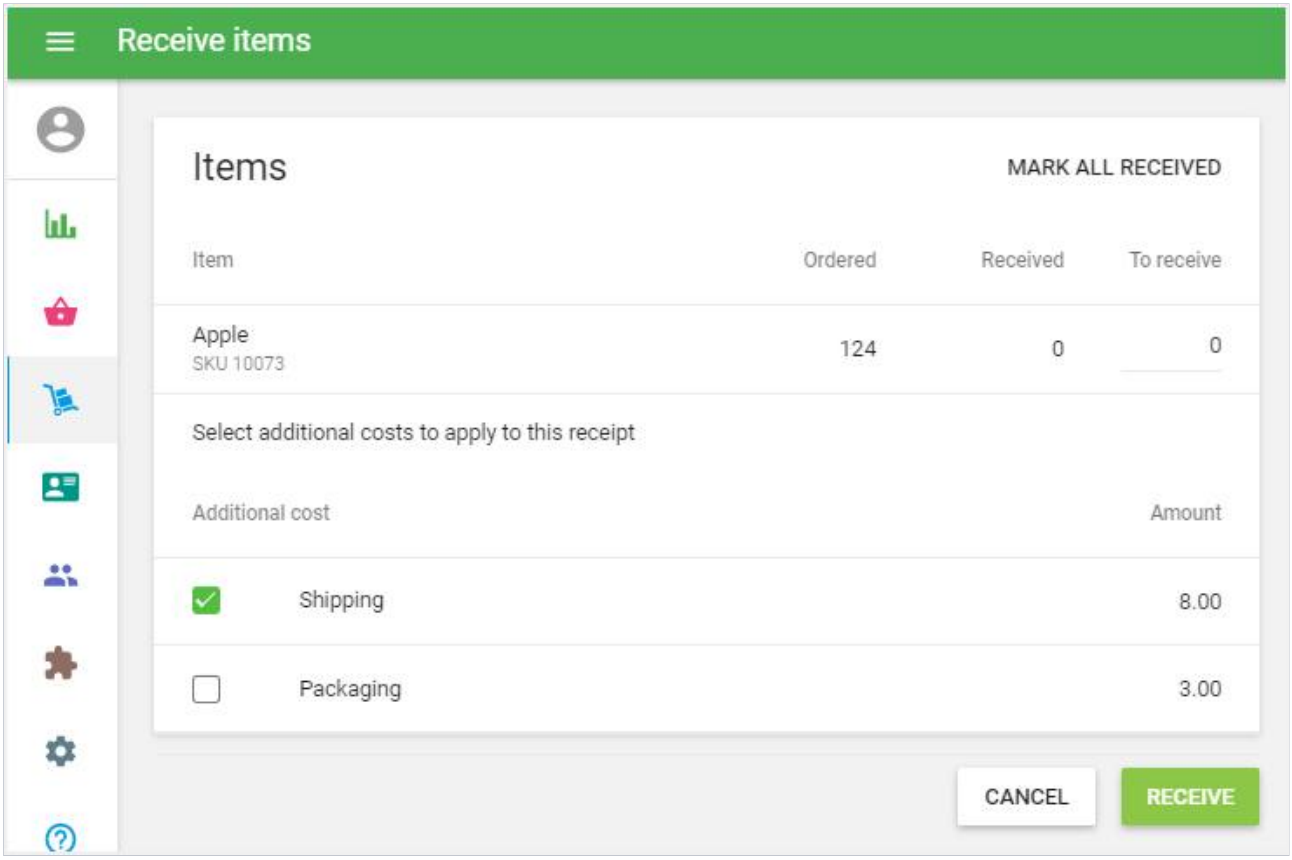
Click **+ Add Additional Cost** to add further lines as needed.

Once the order is saved, the additional costs will appear in the order details, and their total will be added to the item subtotal to calculate the overall Order **Total**.

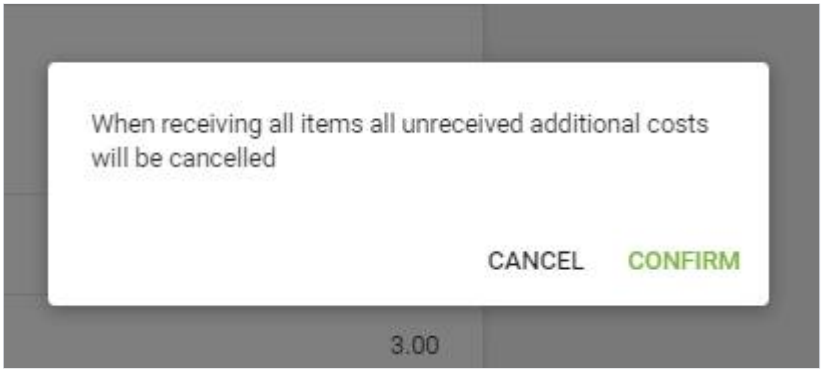


Applying Additional Costs When Receiving Items

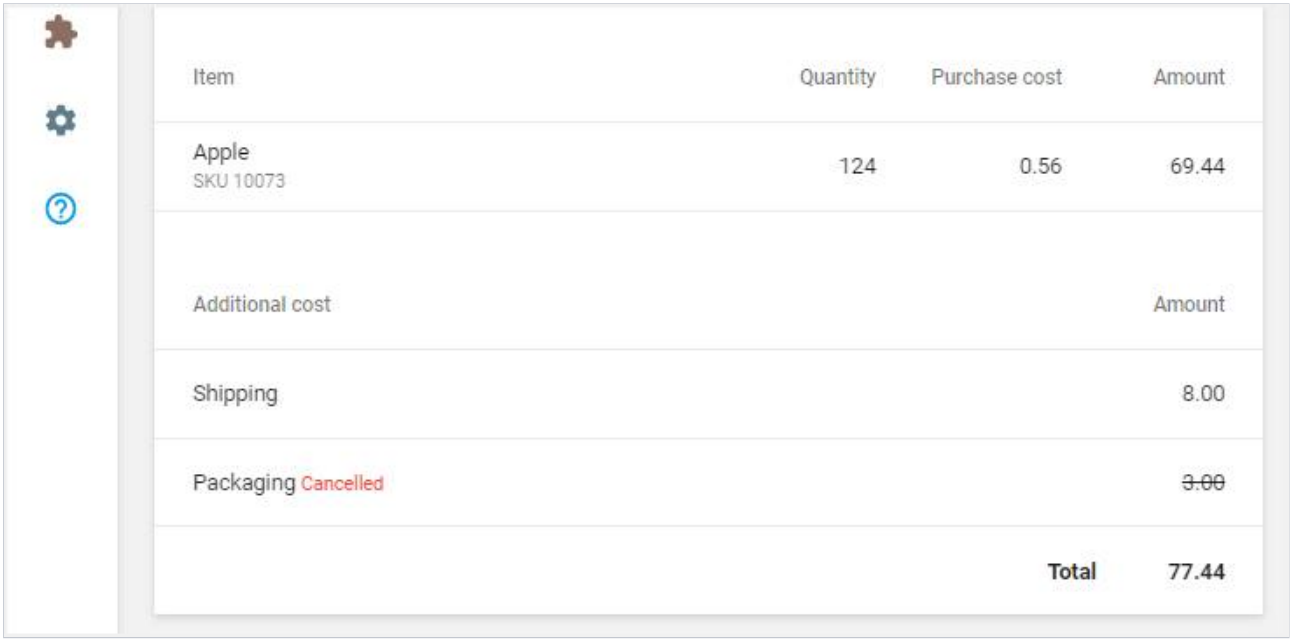
When confirming receipt of a purchase order, you can choose which additional costs to include in the final item cost calculation.



- **Partial receipt:** If you are only receiving some items from the order, you can apply additional costs selectively to those items only.
- **Cancellation of unreceived costs:** If you have received all remaining items but some additional costs are still unselected, the system will notify you that all unselected additional costs will be cancelled. Confirm to proceed.



Cancelled costs will be marked accordingly in the received order details.



How Additional Costs Affect Average Cost

After receiving the purchase order, the system recalculates the **weighted average cost** for each item, taking the selected additional costs into account. This feeds into the **Total Inventory Value** and **Potential Profit** indicators in the Inventory Valuation Report.

Additional costs are distributed across all received items **in proportion to each item's purchase cost**.

The final purchase cost of an item, including additional costs, is calculated as:

$$Cfinal = C1 * (1 + \frac{Costs}{Subtotal})$$

Variable	Description
C1	Purchase cost of the received item
Costs	Total amount of selected additional costs for this receipt
Subtotal	Total value of all items received in the order (excluding additional costs)

See also:

Advanced Inventory Management Overview

How to Work with Purchase Orders and Suppliers

How to Work with Transfer Orders

How to Work with Stock Adjustments

Inventory History and Valuation Report

[How to Work with Inventory Count]

[How to Print Labels for Items]

How to Print Labels for Items

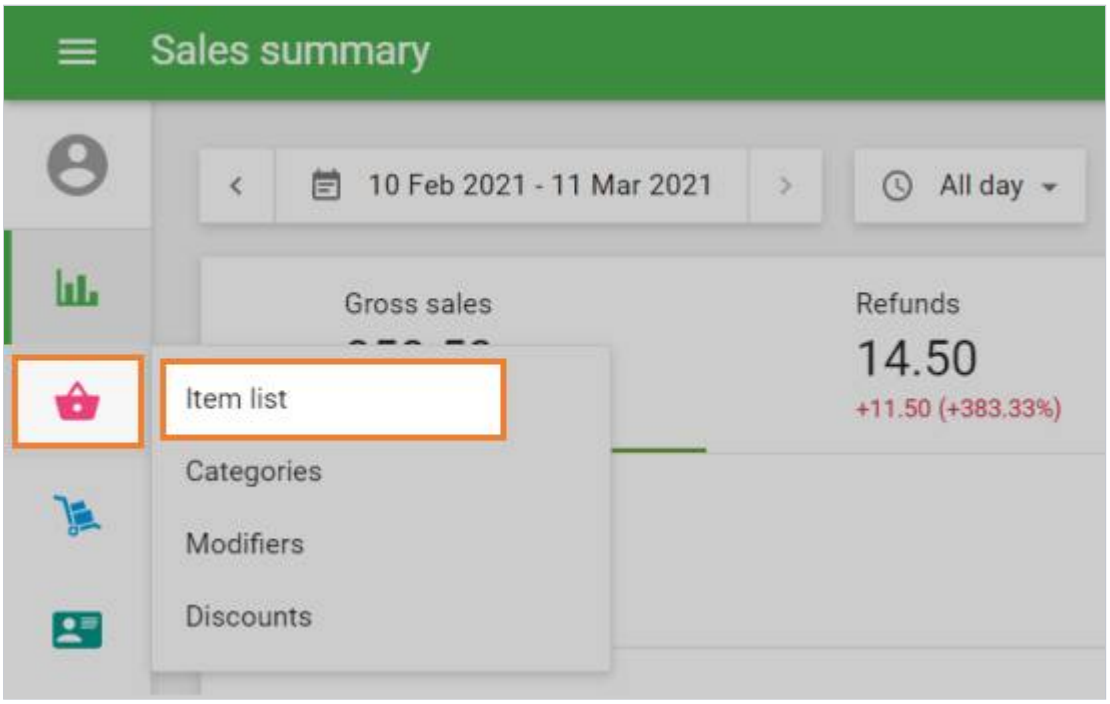
Video
https://www.youtube.com/watch?v=q0Vf4zZNV0U

Labels are used to mark items in your store. Each label can contain the item's **name**, **SKU**, **price**, and **barcode**. Labels with a barcode allow you to use a scanner to add items to a ticket.

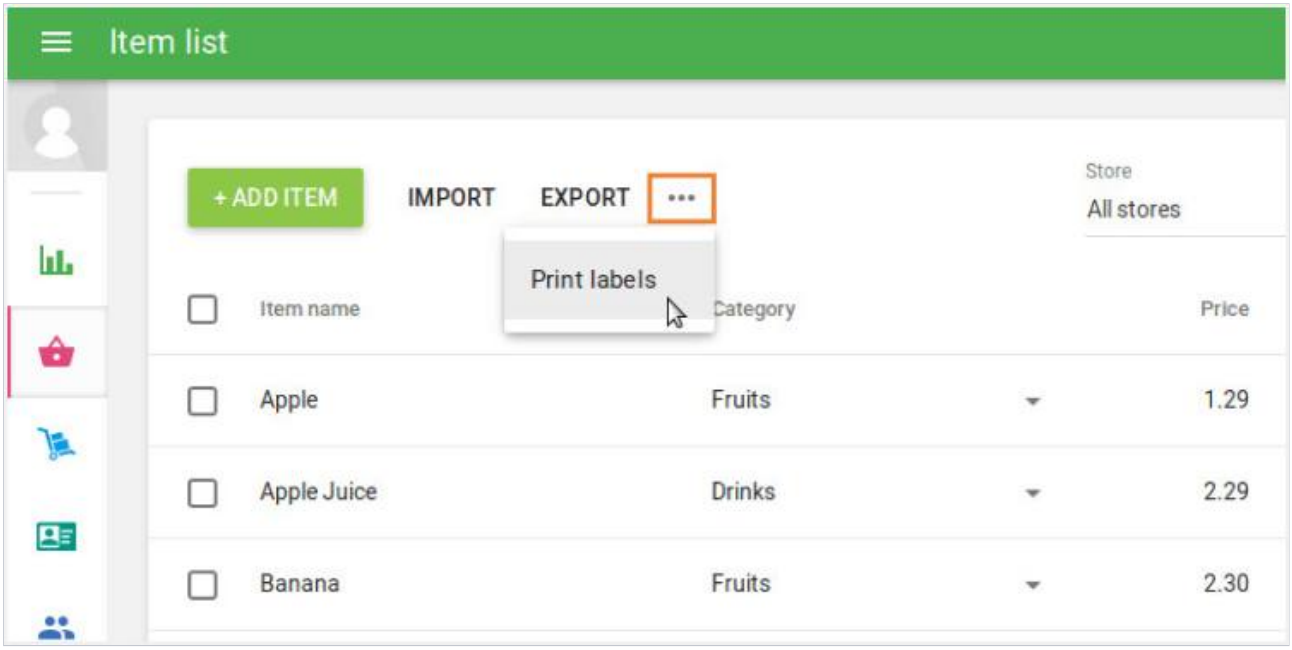
Note: Printing Labels is part of Advanced Inventory Management and requires an active subscription. See Advanced Inventory Management Overview to learn how to activate it.

Printing Labels from the Item List

In the Back Office, go to the **Item List**.

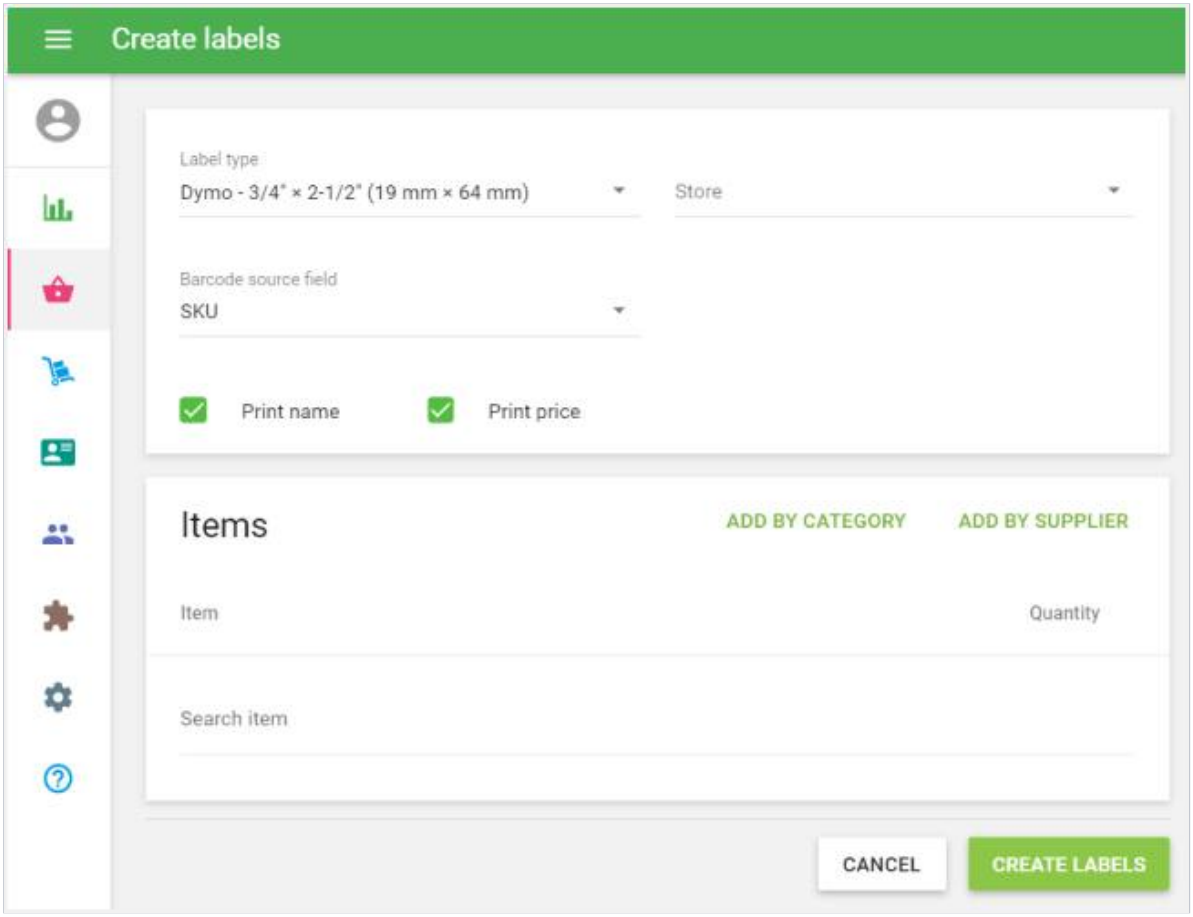


Click the ⋮ **(More)** menu and select **Print Labels**.

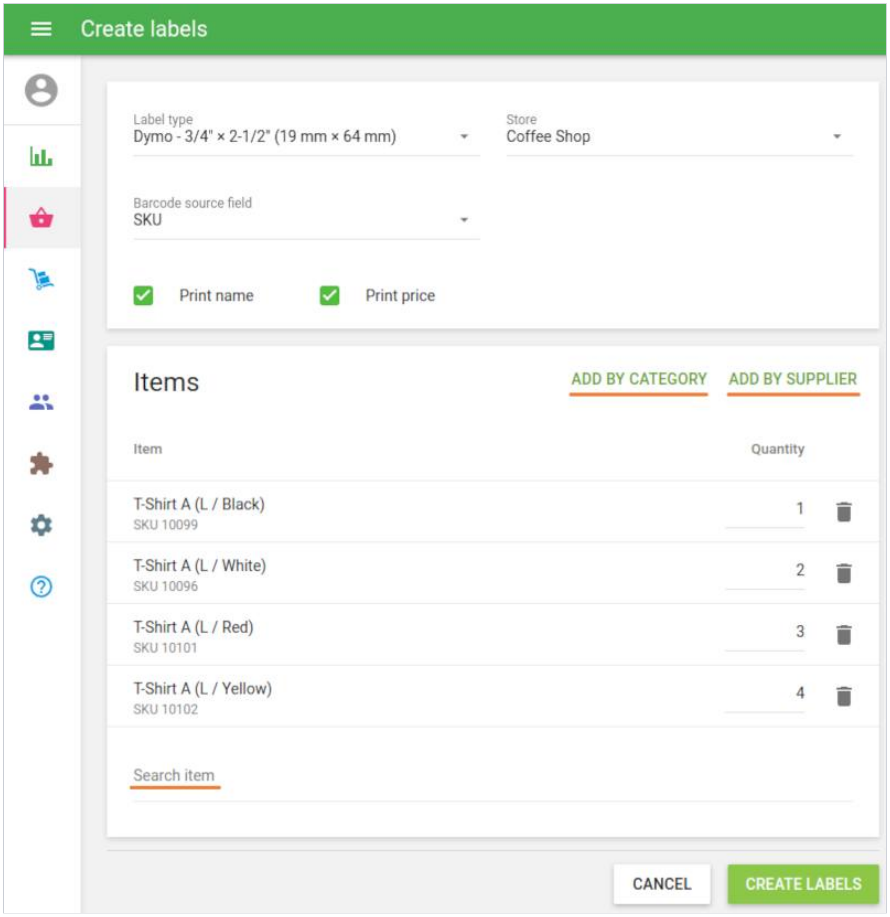


In the **Print Labels** form, configure the following options:

Setting	Description
Label Type	Select a predefined printing template from the drop-down list.
Barcode Source Field	Choose SKU, Barcode, or None (selecting None omits the barcode from the label).
Store	Select the store whose item prices will be printed on the labels. The price will include the currency symbol or name as defined in your account settings.
Print Name	Check this box to include the item name on the label.
Print Price	Check this box to include the item price on the label.



The system will remember your settings and use them as defaults the next time you open the Print Labels form.



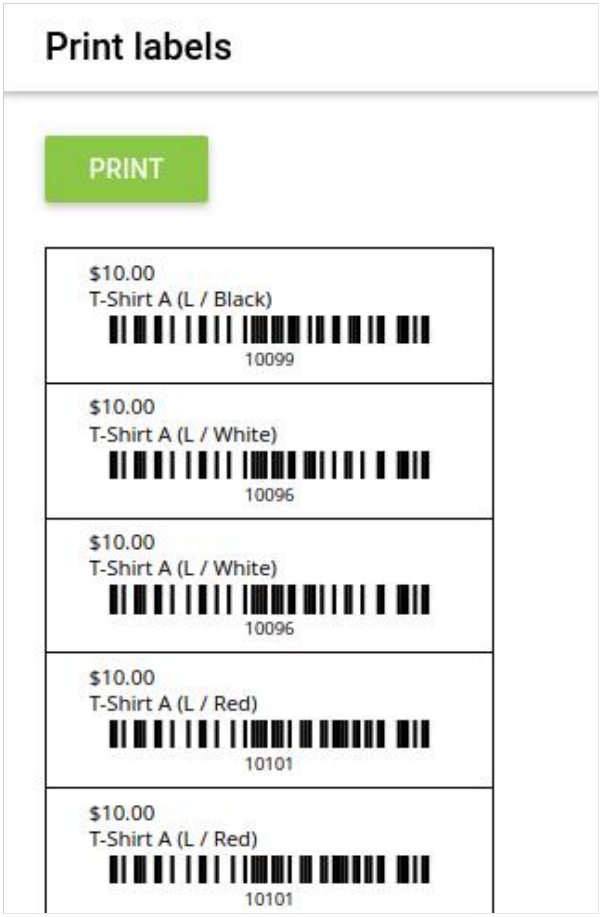
In the **Items** section, build your list of items to label using one of the following methods:

- **Search Item field** — Add items one by one.
- **Add by Category** — Add all items in a specific category.
- **Add by Supplier** — Add all items assigned to a specific supplier.

Enter the number of labels to print in the **Quantity** column for each item.

Click **Create Labels**.

A new browser tab will open with the generated labels as an HTML page.



Click **Print** to print them on your printer.

Printing Labels from a Document

You can also print labels directly from a **Purchase Order**, **Transfer Order**, or **Stock Adjustment** document:

1. Open the document.
2. Click **More → Print Labels**.
3. The **Print Labels** window will open with the items from the document pre-populated. The quantity of labels will be filled in automatically based on the item quantities in the document.
4. Adjust quantities or remove any items that do not need labels, then proceed as above.

Barcode Notes

- **Format:** Code 128, which supports digits 0–9 and Latin letters A–Z and a–z.
- **Maximum length:** 80 characters. For better readability on small labels, keep barcodes to **18 characters or fewer**.

See also:

Advanced Inventory Management Overview

How to Work with Purchase Orders and Suppliers

How to Work with Transfer Orders

How to Work with Stock Adjustments

Inventory History and Valuation Report

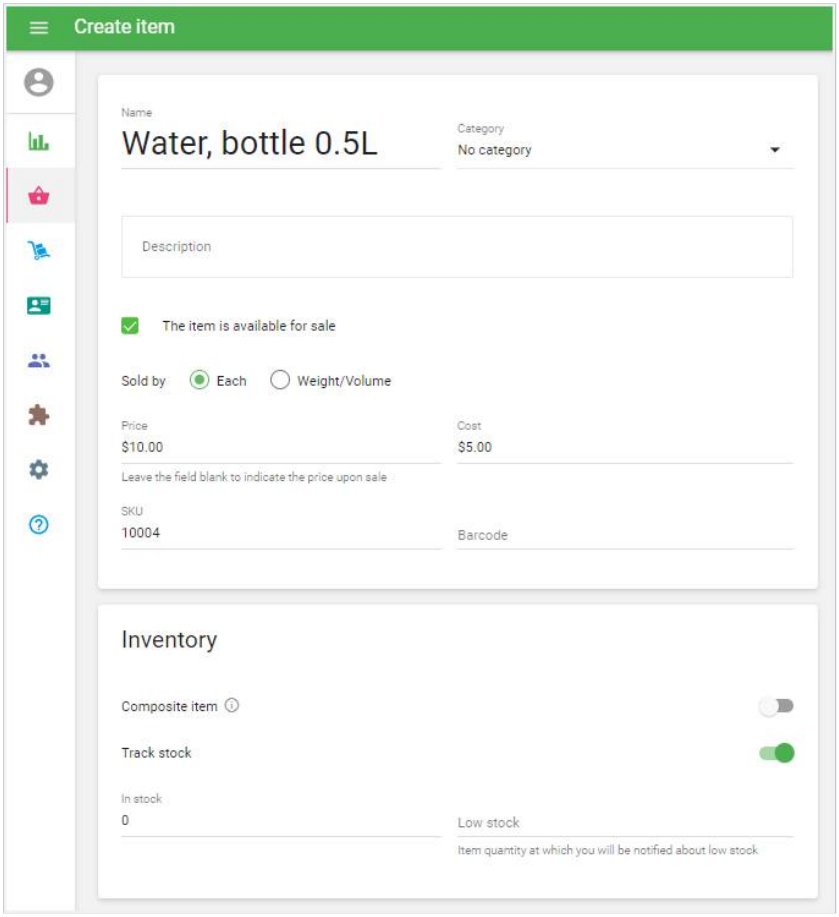
How to Work with Inventory Count

How to Work with Additional Costs in the Purchase Orders

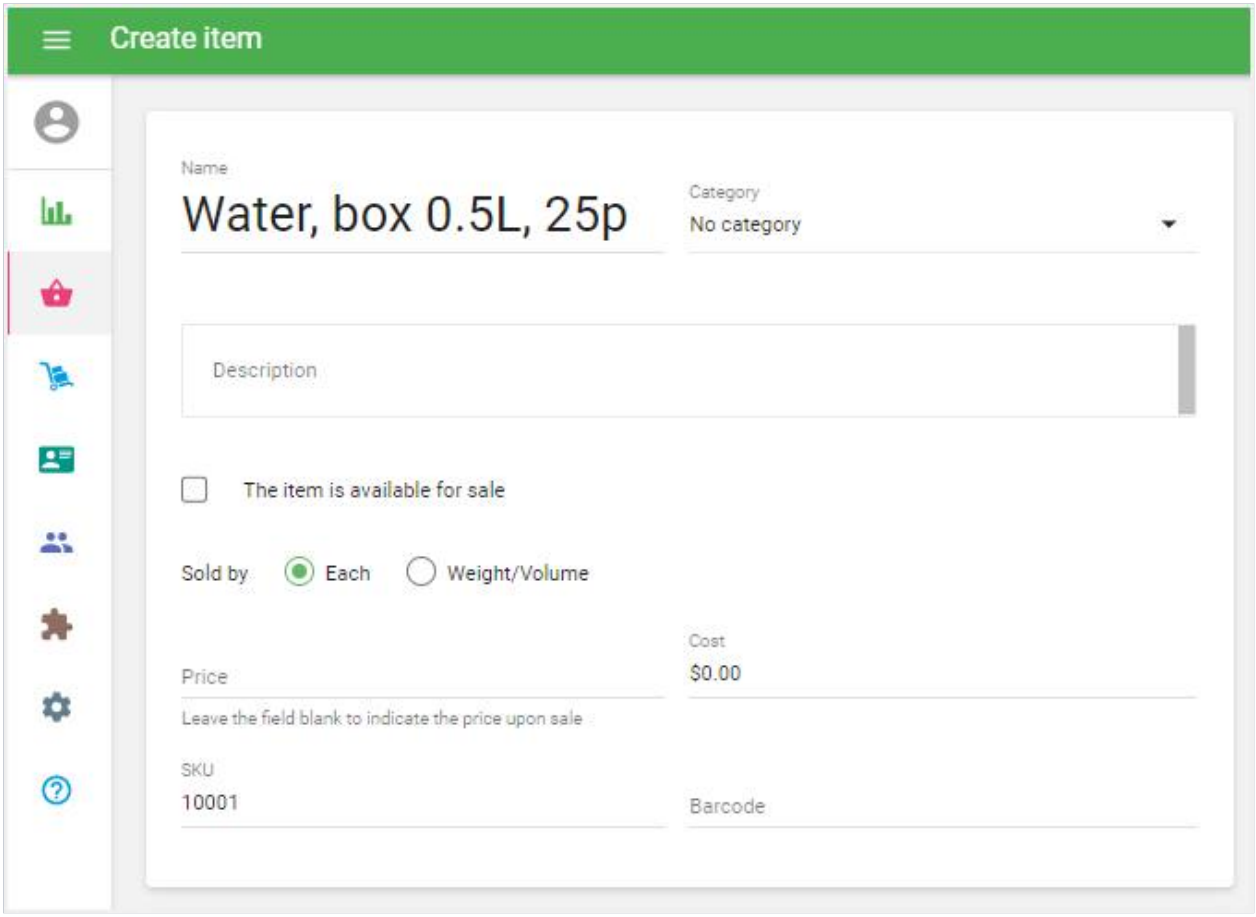
How to Order Items by Boxes, and then Sell them by the Piece

Sometimes, it is required to order items from suppliers only by boxes, when each box consists of a certain amount of items.
It is possible to create purchase orders with items by boxes, and after receiving it, you can disassemble them into items, so you can sell those items by the piece and track their stock.

Go to the Items list at the Back office. You need to create two sets of items: for selling and to order by boxes.
First, you need to have an item for sale by the piece. Let's say you create an item, sold by each, 'Water, bottle 0.5L'. Don't forget to enter the initial cost and set the tracking stock for the item.



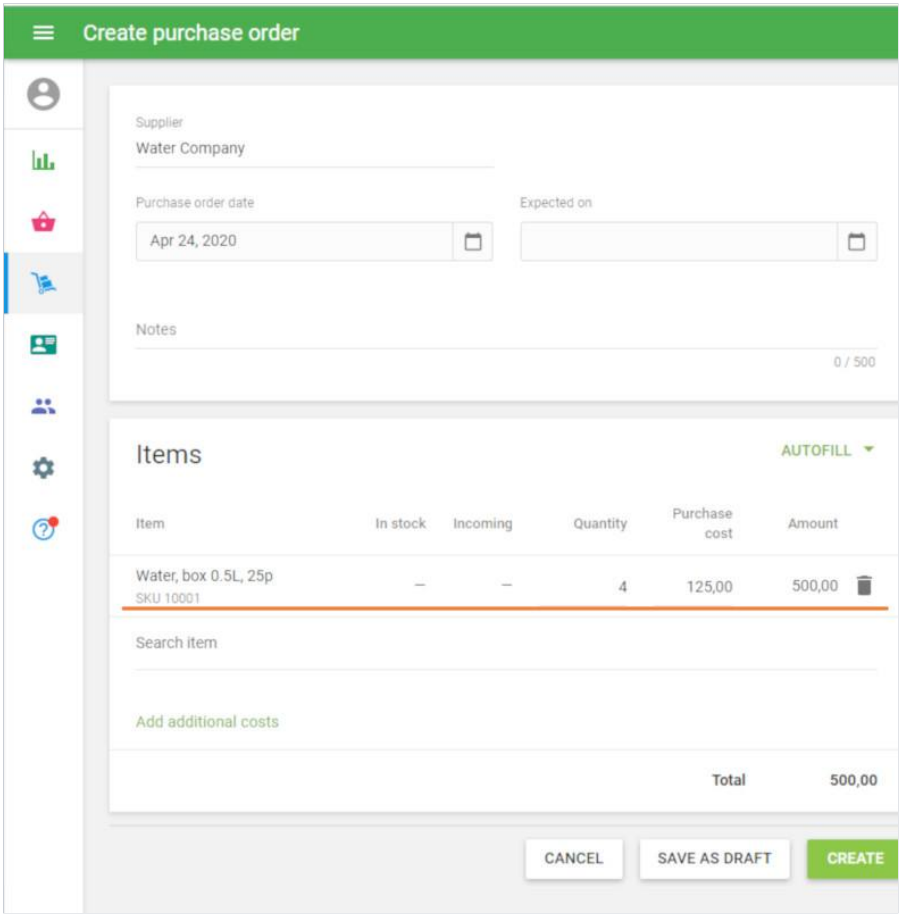
Then, create a composite item for box orders. If you are not going to sell by boxes, you can make it invisible for sale. Let's create an item, 'Water, box 0.5L, 25p'.



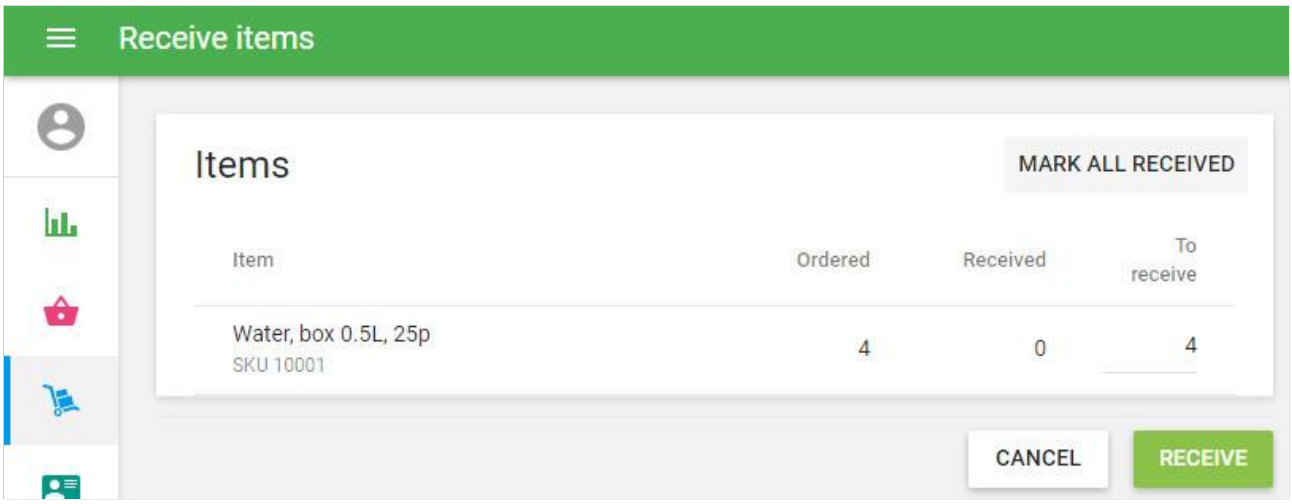
At the inventory block, set this item as composite and switch on the option ‘Use production’. Choose the component ‘Water, bottle 0.5L’, and set the quantity for one box. Let’s say each box contains 25 bottles of water.

Don’t forget to save the changes.

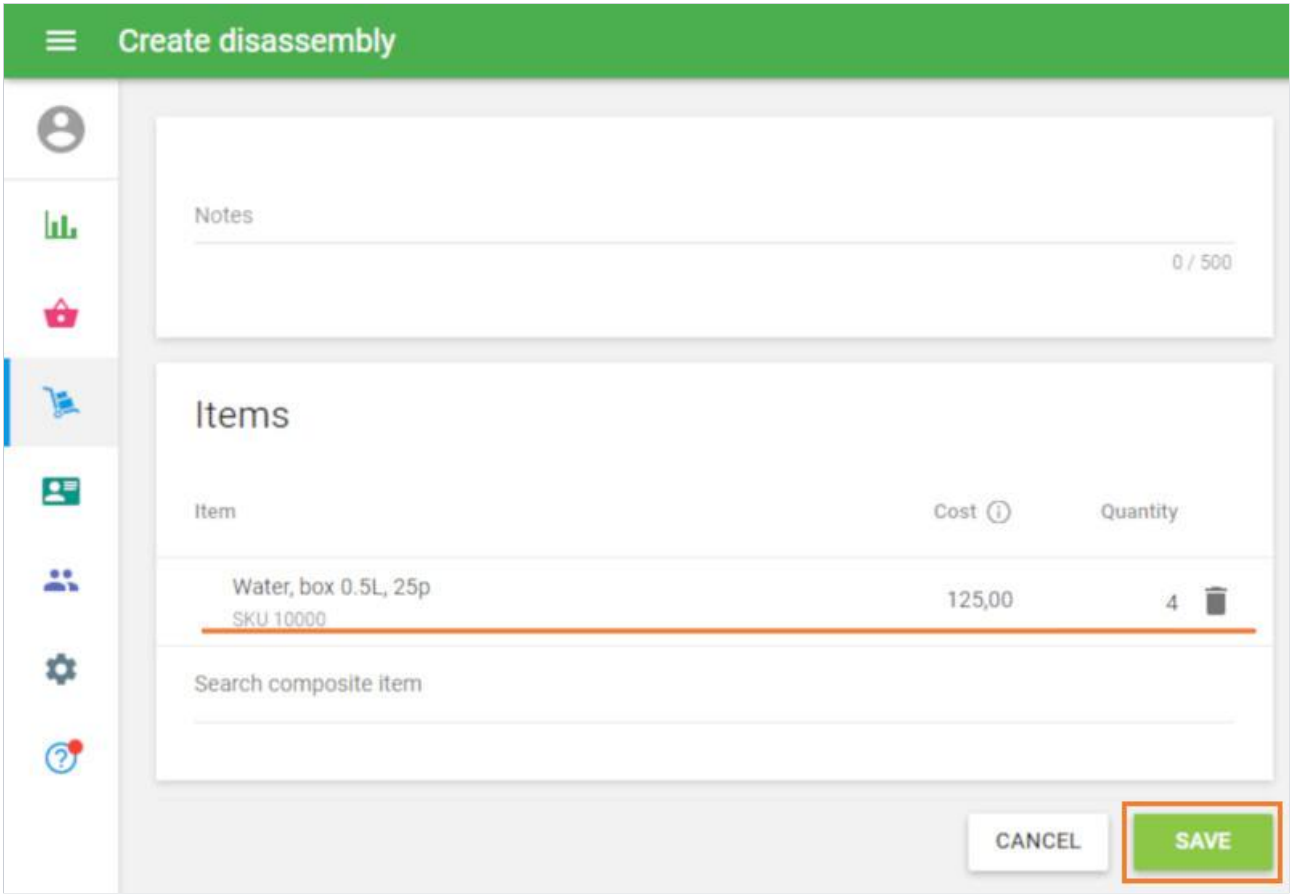
Now you can order this item by the box.
Create a purchase order, and select the boxed item.
Fill in the ‘Quantity’ and the ‘Purchase cost’ for the box. And create a purchase order.



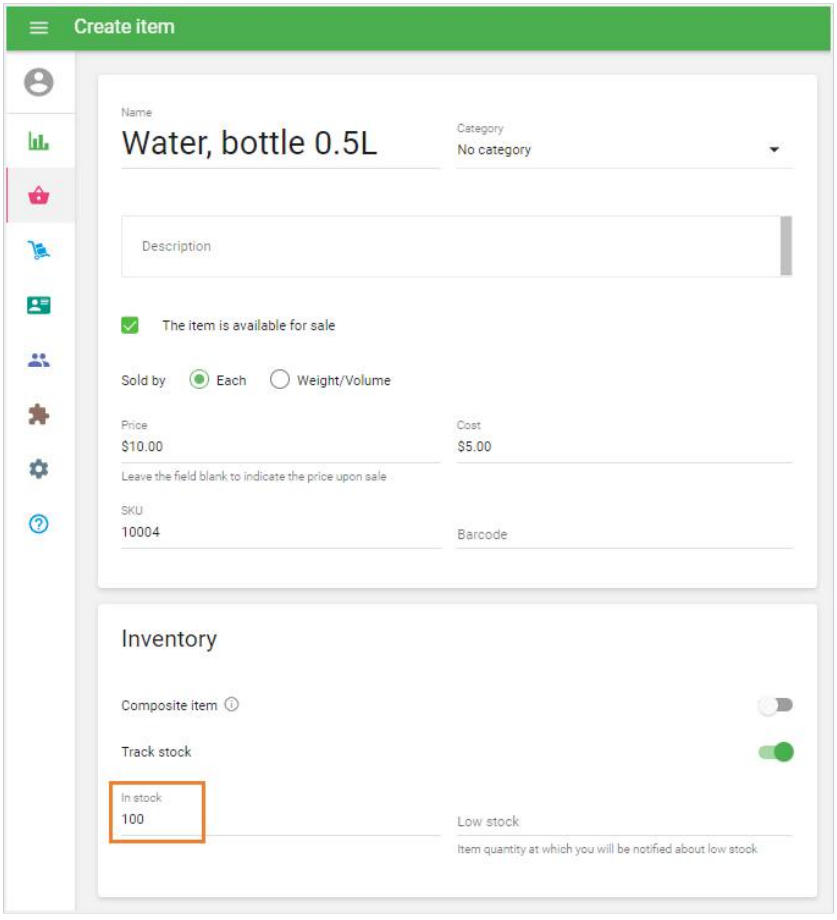
After receiving, the received stock will renew the stock of the boxed item.



After that, you can disassemble the boxed items into pieces.
Create disassembly, select the boxed item, and put the number of received boxes.



After that, the stock of ‘Water, bottle 0.5L’ will be automatically updated.



See also:

[How to Work with Purchase Orders and Suppliers]

[How to Work with Production]

Employees

How to Add an Employee in Loyverse

Video
https://www.youtube.com/watch?v=DxzBChXDobw

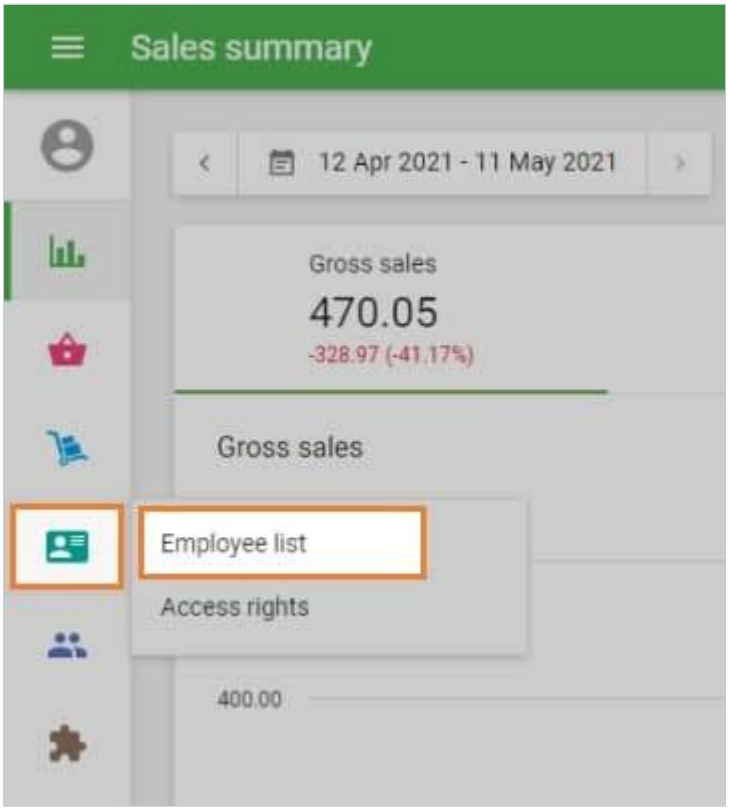
The **Employee Management** feature is available with a paid subscription. A free trial can also be activated.

To start a subscription or trial:

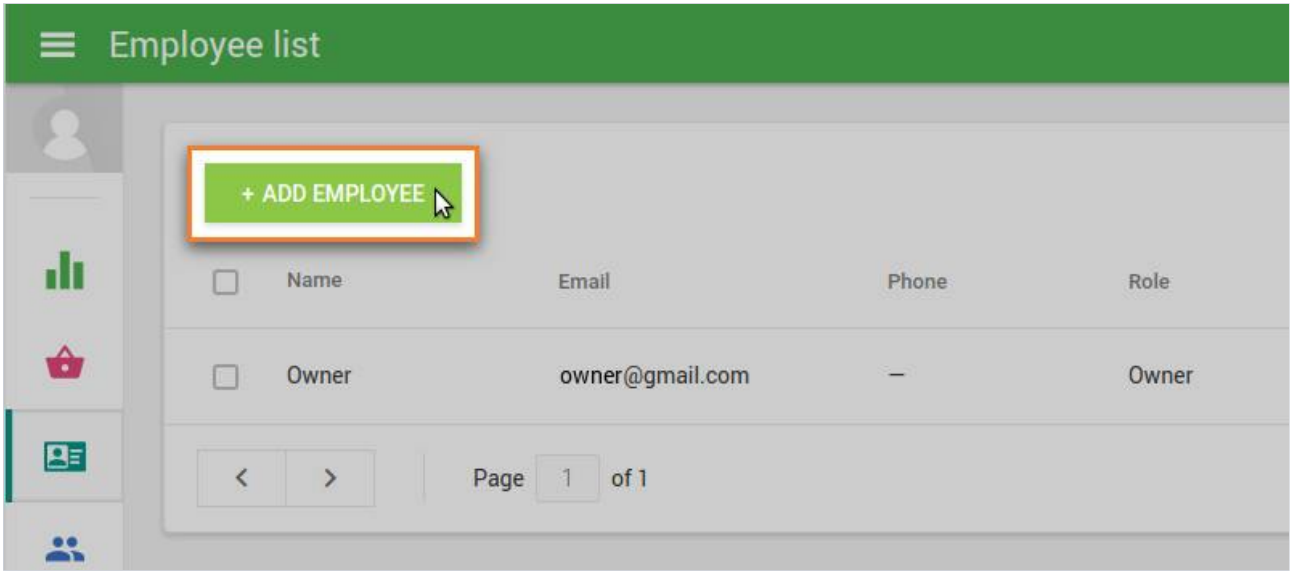
1. Log in to the **Back Office**.
2. Go to **Settings → Billing & subscriptions**.
3. Activate the Employee Management add-on.

1. Opening the Employee List

In the Back Office, go to **Employees → Employee list**.

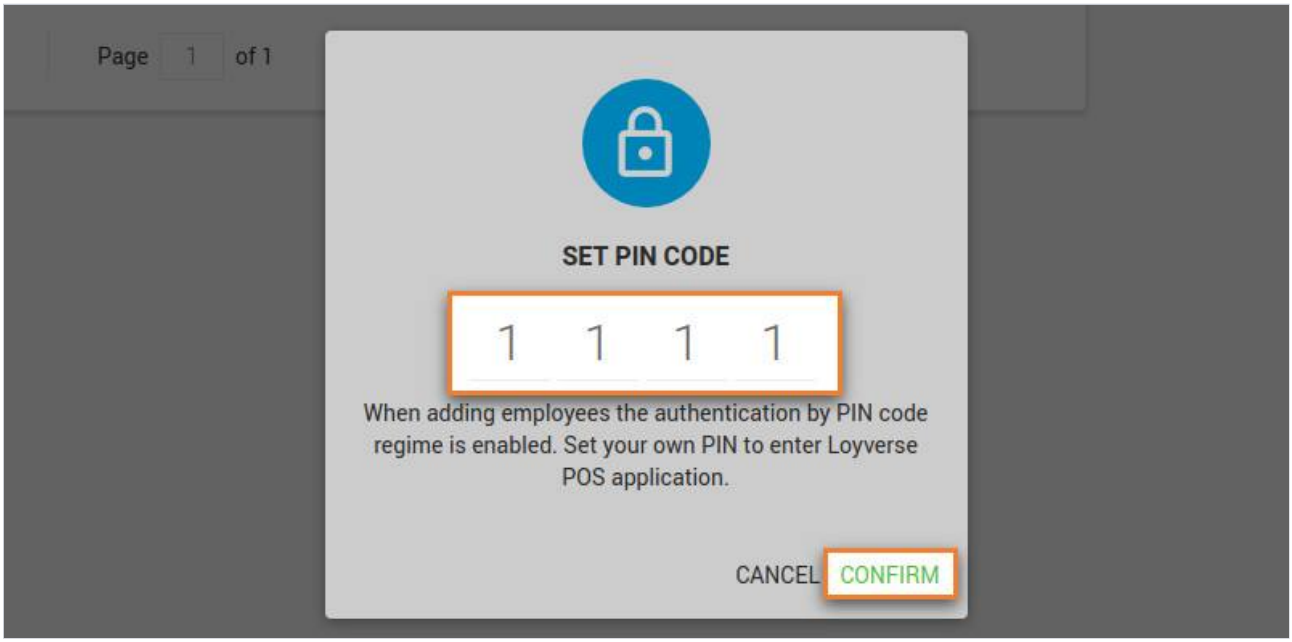


Click **Add employee**.



2. Setting the Owner PIN (First-Time Setup)

When adding an employee for the first time, the system will ask the account owner to create a **PIN code**.



This PIN is used to access the POS system with owner-level permissions.

After the owner PIN is created, you will not need to set it again.

3. Creating an Employee Profile

Fill in the employee information fields:

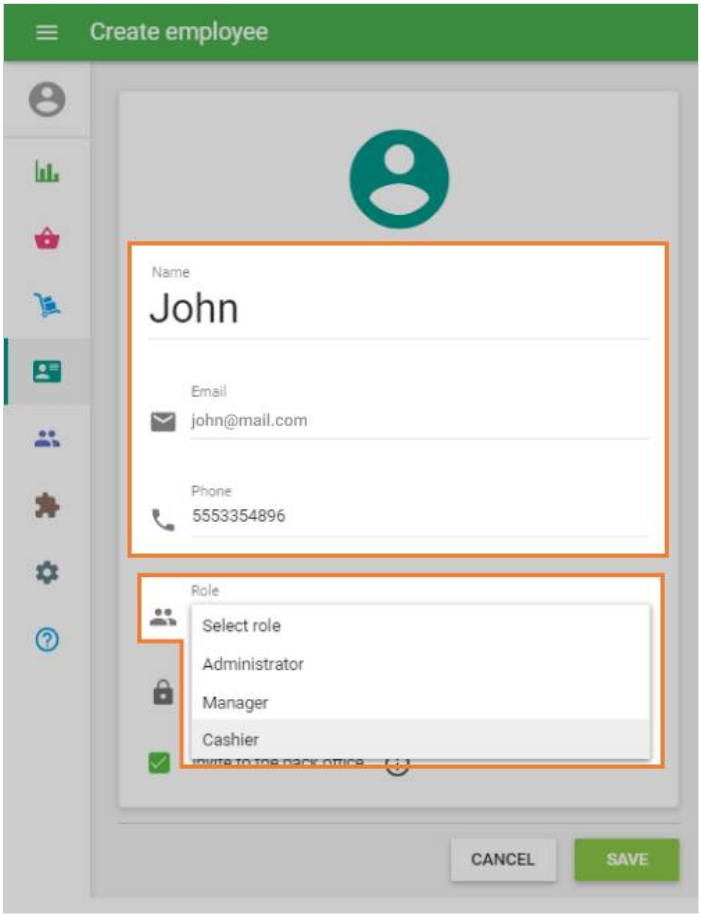
Name

Email (optional)

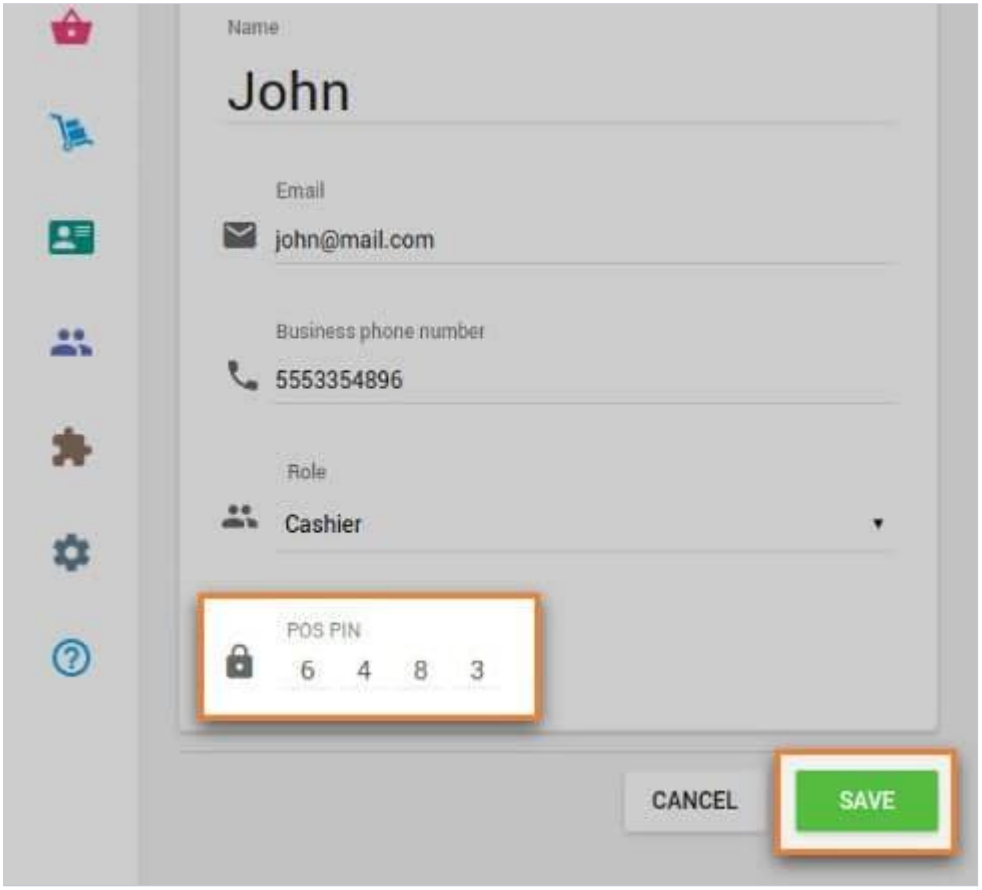
Phone number (optional)

Role – choose one of the predefined access levels:

- **Administrator** – full access, including Back Office
- **Manager** – limited management permissions
- **Cashier** – POS-only operational access



You will then create a **four-digit PIN** for the employee.



This PIN will be used to sign in to the Loyverse POS app.

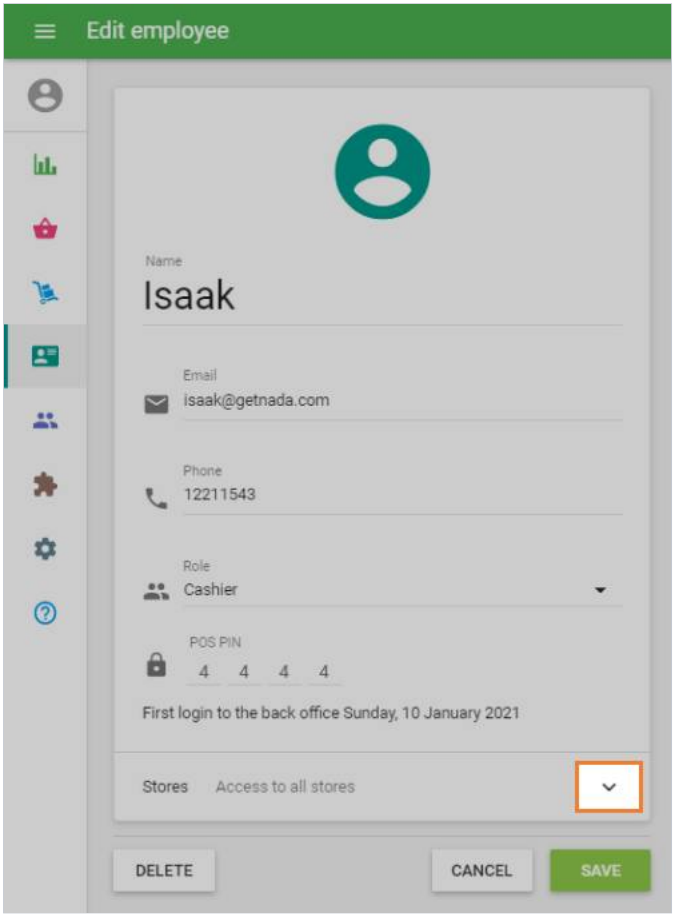
Tap **Save** when finished.

4. Assigning Stores (For Multistore Accounts)

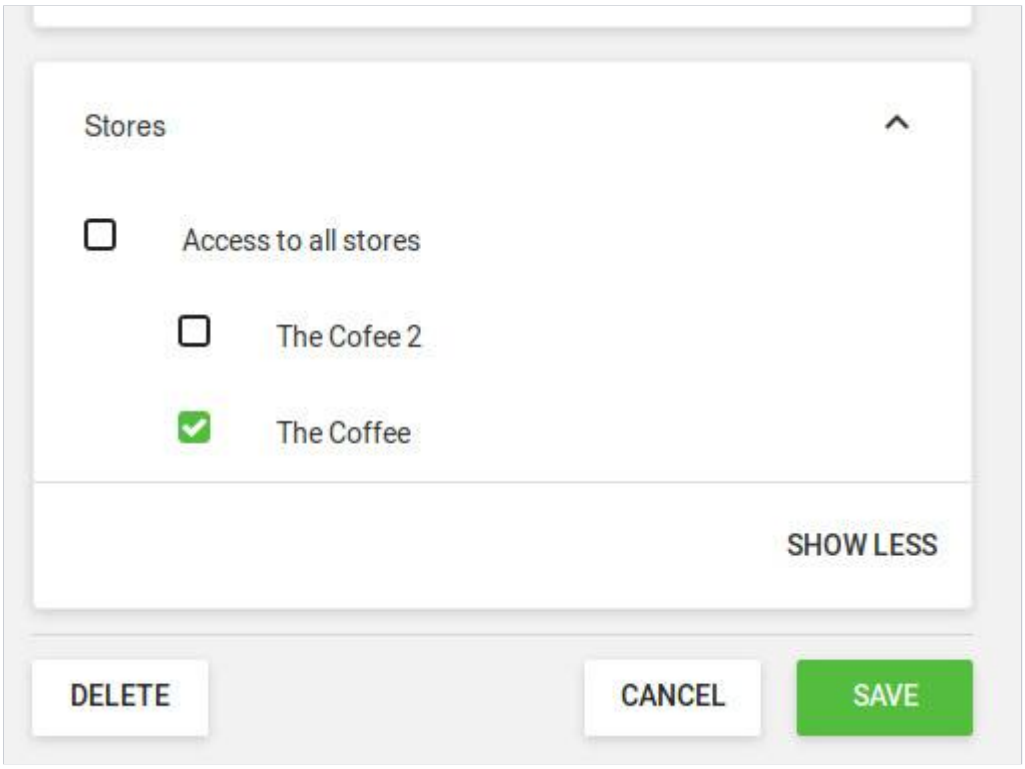
If you have multiple stores, you can manage which locations each employee can access.

In the employee profile, scroll to the **Stores** section.

Click the dropdown arrow to expand the list of stores.



Select the store(s) the employee is allowed to work in.



Save your changes.

Employees can only log in to the POS assigned to their permitted stores.

5. Employee Login at the POS

Once saved:

- The employee can log in using their assigned **PIN code** or **email**.
- Their permissions will match the selected **role** and the **assigned store**.

See also:

How to Manage Access Rights of Employees

How to Switch User Account to Different Employee in the Opened Loyverse POS

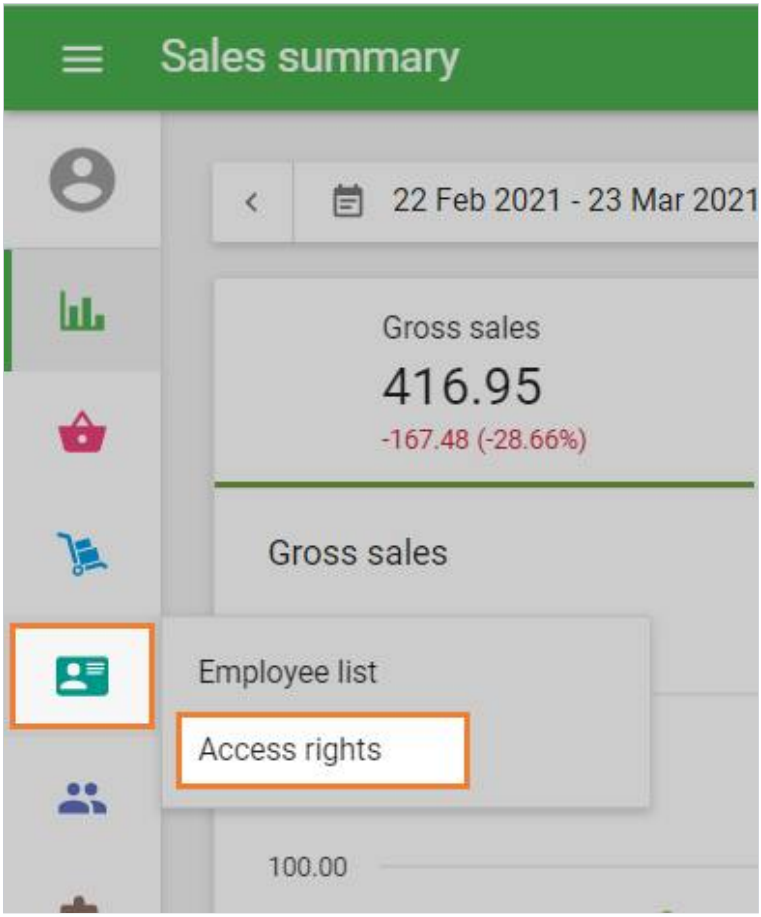
Shift Management in Loyverse POS

How to Manage Access Rights of Employees

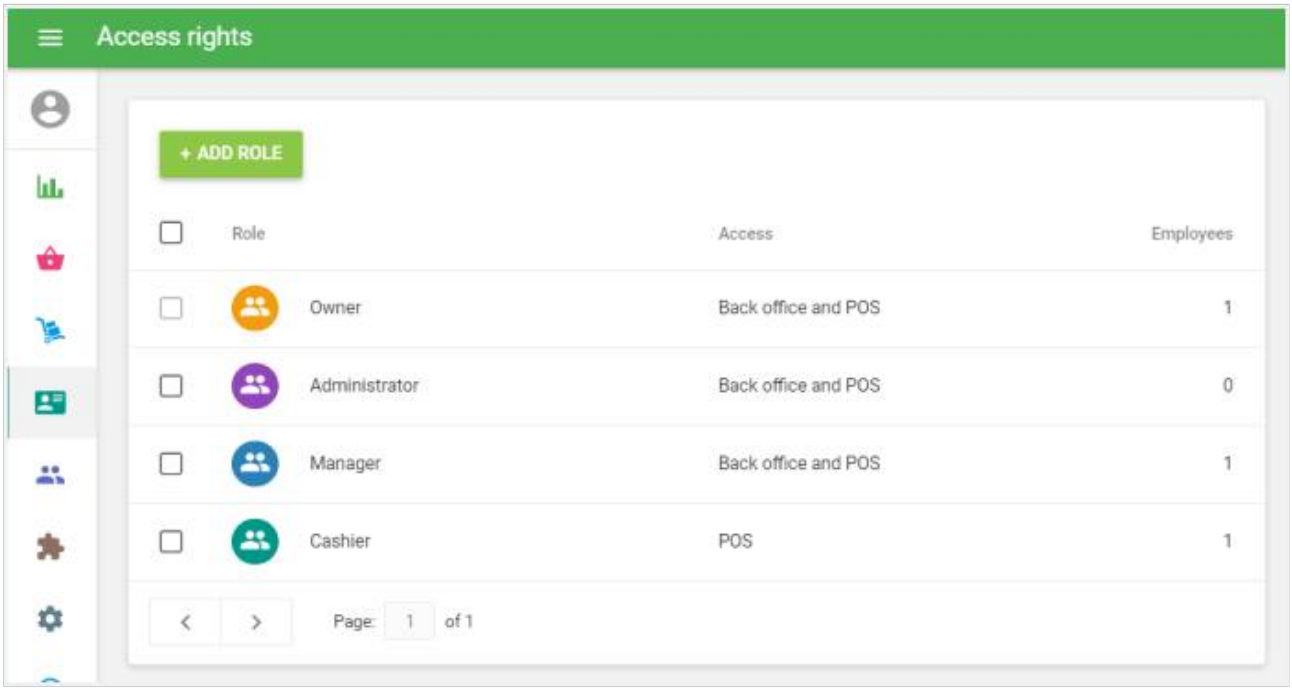
Video
https://www.youtube.com/watch?v=DxzBChXDobw

The owner can give employees different access rights to the POS app (Play Market or App Store) and the Back Office. To do this, you can set up the users' roles.

Enter the Back Office and open the 'Access rights' section in the Employee menu.



You can see the user roles. By default, there are four preset roles: Owner, Administrator, Manager, and Cashier. You can create a new role by clicking on the '+ Add role' button.



The owner has all the possible rights, which cannot be changed. All other groups can be edited.

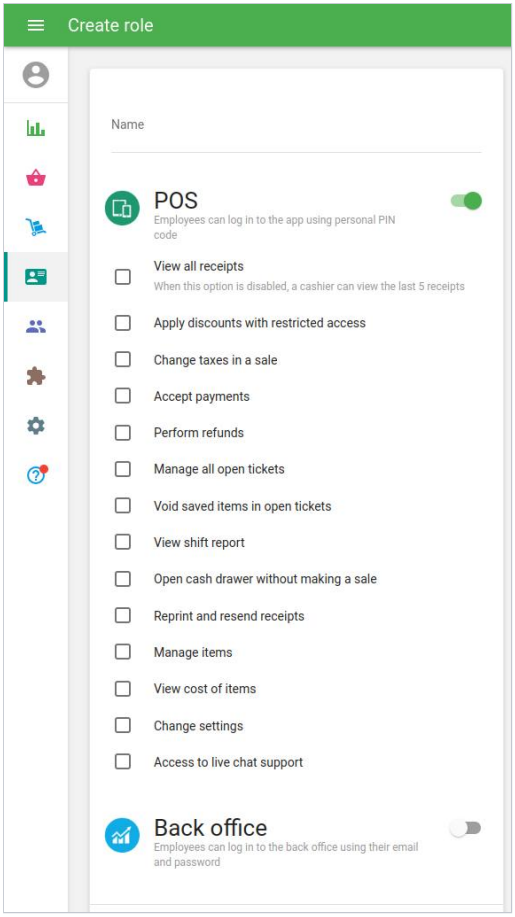
You can assign a role to the employee during creation or change the role of existing employees.

There are two blocks of access rights: POS and Back office.

POS access rights

You can create a new role by clicking the '+ Add role'.

Fill in the Name field of a new role. Note that there cannot be two roles with the same name.



You can assign the access rights to the role using the checkbox.

View all receipts
When this option is disabled, the employee can only view the 5 most recent receipts. You can use this access restriction to forbid your employees to see and make refunds for older receipts. See details in Receipts List in the POS.

Apply discounts with restricted access
When this option is disabled, the employee does not have the right to use the restricted discounts. See details in How to Create and Configure Discounts.

Change taxes in a sale
When this option is disabled, the employee cannot change taxes, applied to the items during a sale.

Accept payments
When this option is disabled, the employee can not charge the ticket and accept payments.

Perform returns
When this option is disabled, the employee cannot make refunds. Such an employee would not have the 'Refund' button in the edit receipt window in the Receipts section of the POS. See detail in How to Issue a Refund on Loyverse POS

Manage all open tickets
If enabled, the employee can view and edit open tickets created by other employees.

Void saved items in open tickets
Deselect if you want to forbid your employees from deleting saved open tickets or deleting items from them. See details in Open tickets

View shift report
You can select whether the employee can see the shift report with the expected amount of cash or not, during and when closing shift. See details in Shift Management in Loyverse POS

Open cash drawer without making a sale
If enabled, the employee will have the 'Open cash drawer' button in the menu at the Sale screen of POS. See details in How to Connect a Cash Drawer

Reprint and resend receipts
If enabled, the employee can reprint receipts and resend them via email

Manage items
If enabled, the employee can add and edit items and categories in the POS. See details in How to Add Items in the Loyverse Back Office

View cost of items
It gives employees the right to see the Cost (or Average cost) field in the item's card.

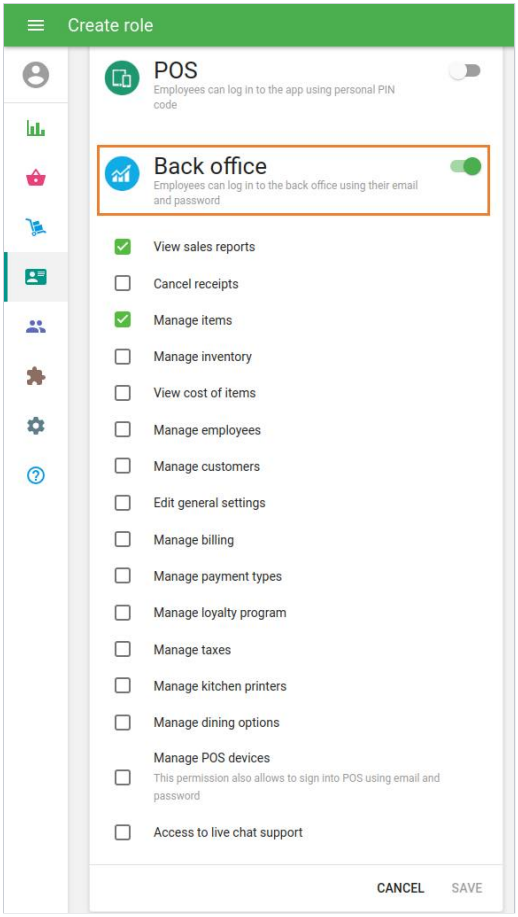
Change settings
Employees with this right can access the Settings at the POS, where it is possible to connect printers, CDS, and KDS.

Access to live chat support
Employees with this right can access chat support.

When an employee tries to access a function on the POS that they do not have access to, the PIN panel will be opened with the request to enter the PIN. After entering the PIN code of an employee who has access to the function, a one-time access is granted to the employee who does not have access to the function.

Back Office access rights

If you want to give the user role access to the Back Office, switch on the Back Office in the form. After that, you will see the list of access rights to the Back Office.



Active checkbox opens access to the corresponding section of the Back Office.

View sales reports
Gives employees the right to access the Reports menu

Cancel receipts
Gives employees the right to access the Cancel receipts functionality in the Receipts section in Reports

Manage items
Gives employees the right to access the Items menu and receive low stock notifications.

Manage inventory
If the Advanced Inventory subscription is activated, it gives employees the right to access the Advanced Inventory menu.

View cost of items
Gives employees the right to see the Cost field in the item's card as well as all other parameters, related to the Cost of item value across the Back office, such as: Gross Profit, Cost of goods, Margin, ...etc.

Manage employees
Gives employees the right to access the Employees menu.

Manage customers
Gives employees the right to access the Customers menu. See details in How to Work with Customer Base in the Back office

Edit general settings
Gives employees the right to access the Features section in Settings. See details in Setting Up Your Shop in Loyverse Back Office

Manage billing
Gives employees the right to access the Billing & subscription section. See details in How to Use Add-on Services of Loyverse POS

Manage payment types
Gives employees the right to access the Payment types section. See details in Configuring Payment Types in Loyverse POS

Manage loyalty program
Gives employees the right to access the Loyalty section in Settings. See details in How to Set Up a Customer Loyalty Program

Manage taxes
Gives employees the right to access the Taxes section in Settings. See details in How to Configure Taxes in the Back Office

Manage kitchen printers
Gives employees the right to access the Kitchen printers section in Settings. See details in Using Kitchen Printers with Loyverse POS

Manage dining options
Gives employees the right to access the Dining options section in Settings. See details in Dining Options

Manage POS devices
Gives employees the right to access the POS devices section in Settings.
This permission also allows them to sign in to POS using email and password. See details in How to Give Employees Access to Login into Loyverse POS through E-mail

Access to live chat support
Gives employees the right to access the live chat support

See also:

How to Add an Employee in Loyverse POS

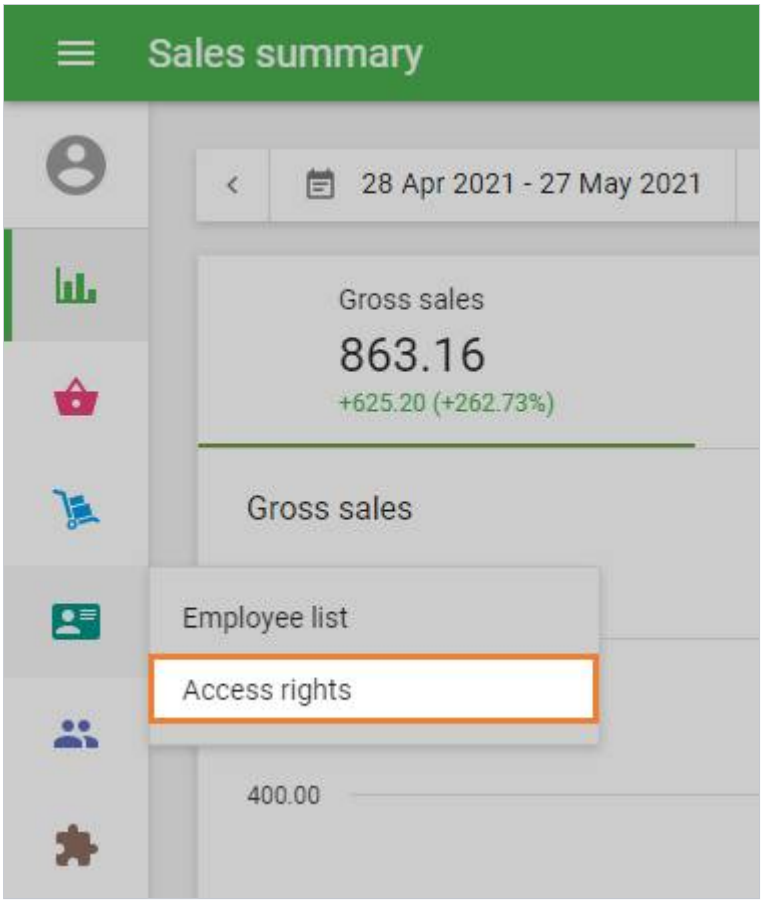
How to Give Employees Access to Log In to Loyverse POS Using Email

Video
https://www.youtube.com/watch?v=DxzBChXDobw

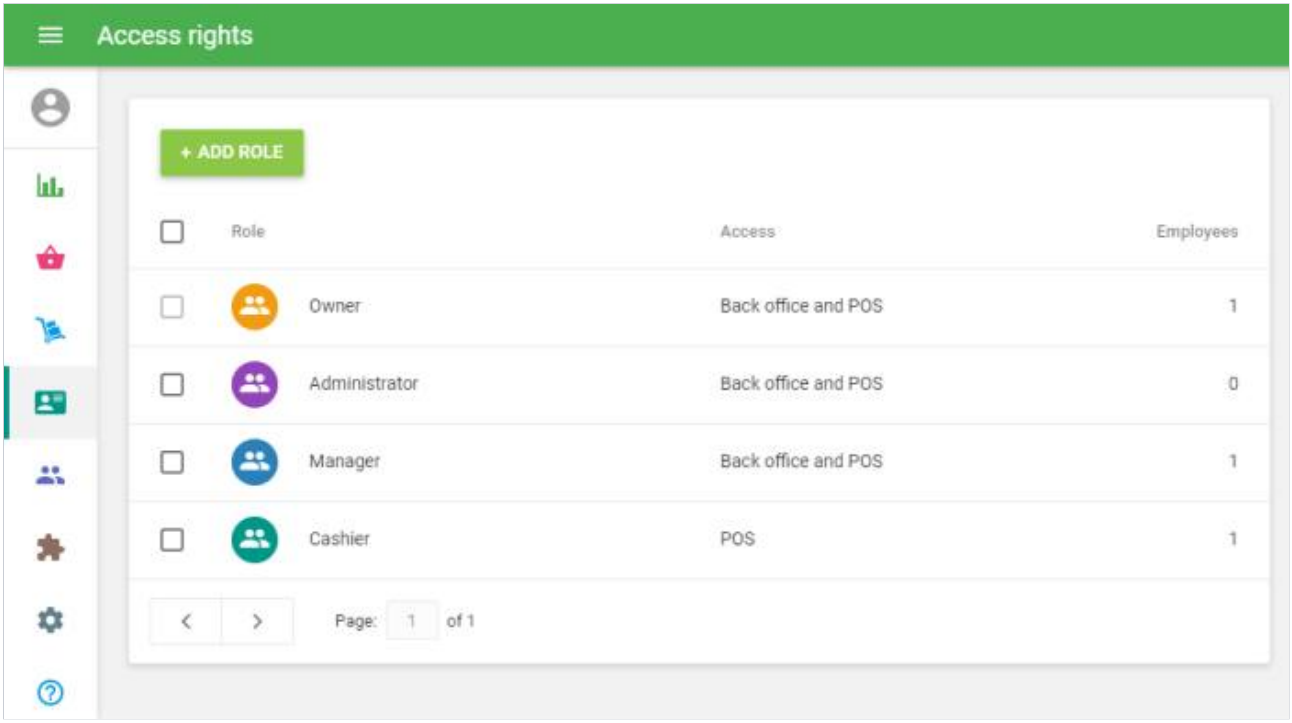
If you want employees to log in to Loyverse POS using an **email and password instead** of a PIN, you need to configure their role and invite them to the Back Office first.

1. Configure Access Rights for the Employee Role

Go to the **Back Office → Employees → Access rights**.



Select an existing role or create a new one.



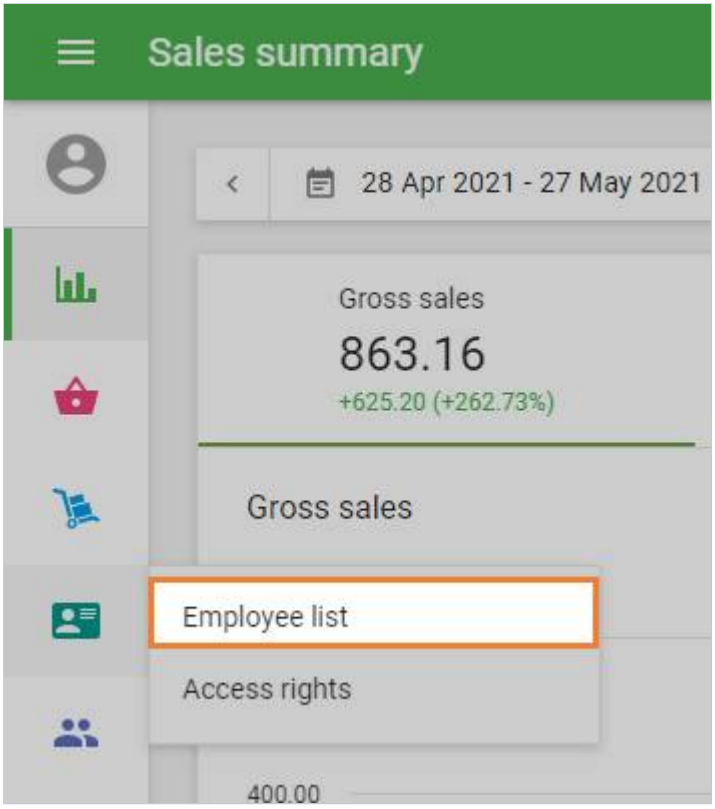
To allow the employee to use email login, you must:

- Enable **Back Office access**.
- Check **Manage POS devices**.

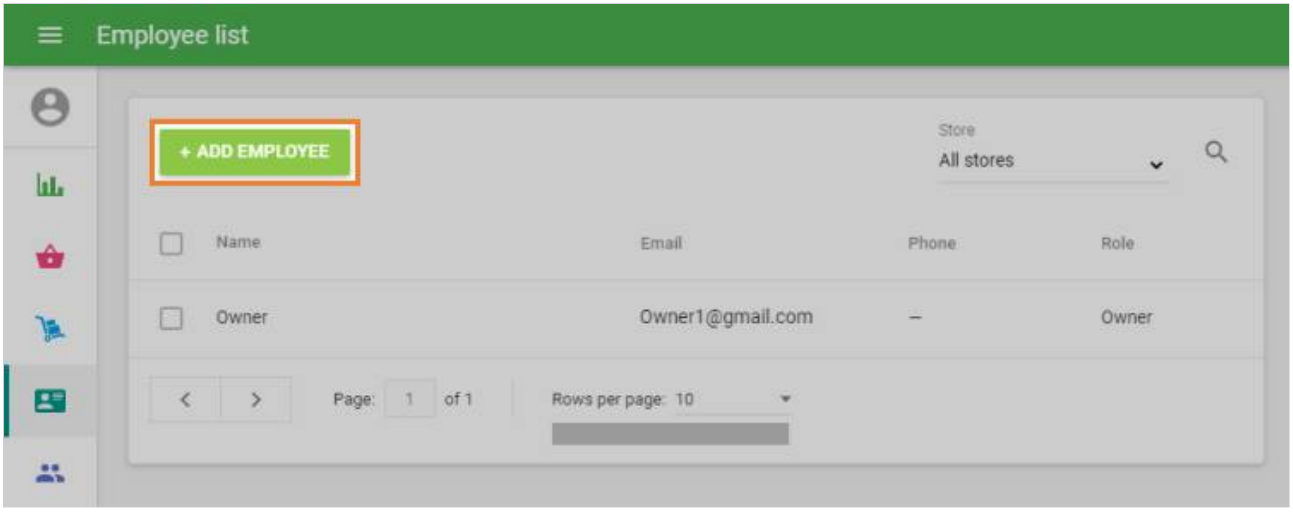
This permission gives an employee access only to manage POS devices unless you grant additional rights.

2. Assign the Employee to a Role

Go to **Back Office → Employees → Employee list**.

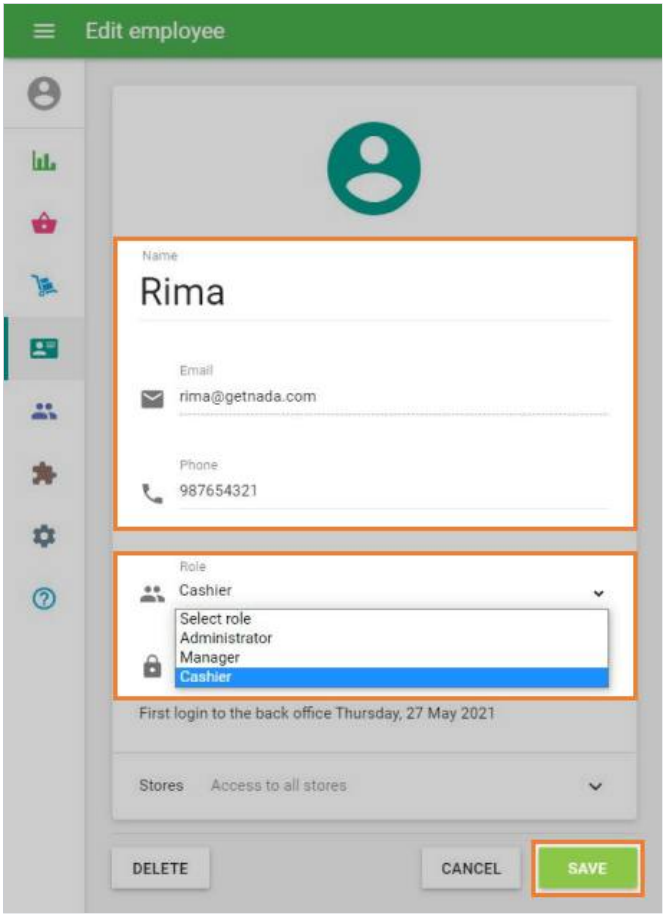


Click **Add employee**, or open an existing employee to edit.



Fill in the following fields:

- Employee name
- Email address
- Phone number (optional)
- Role (selected in step 1)
- POS PIN



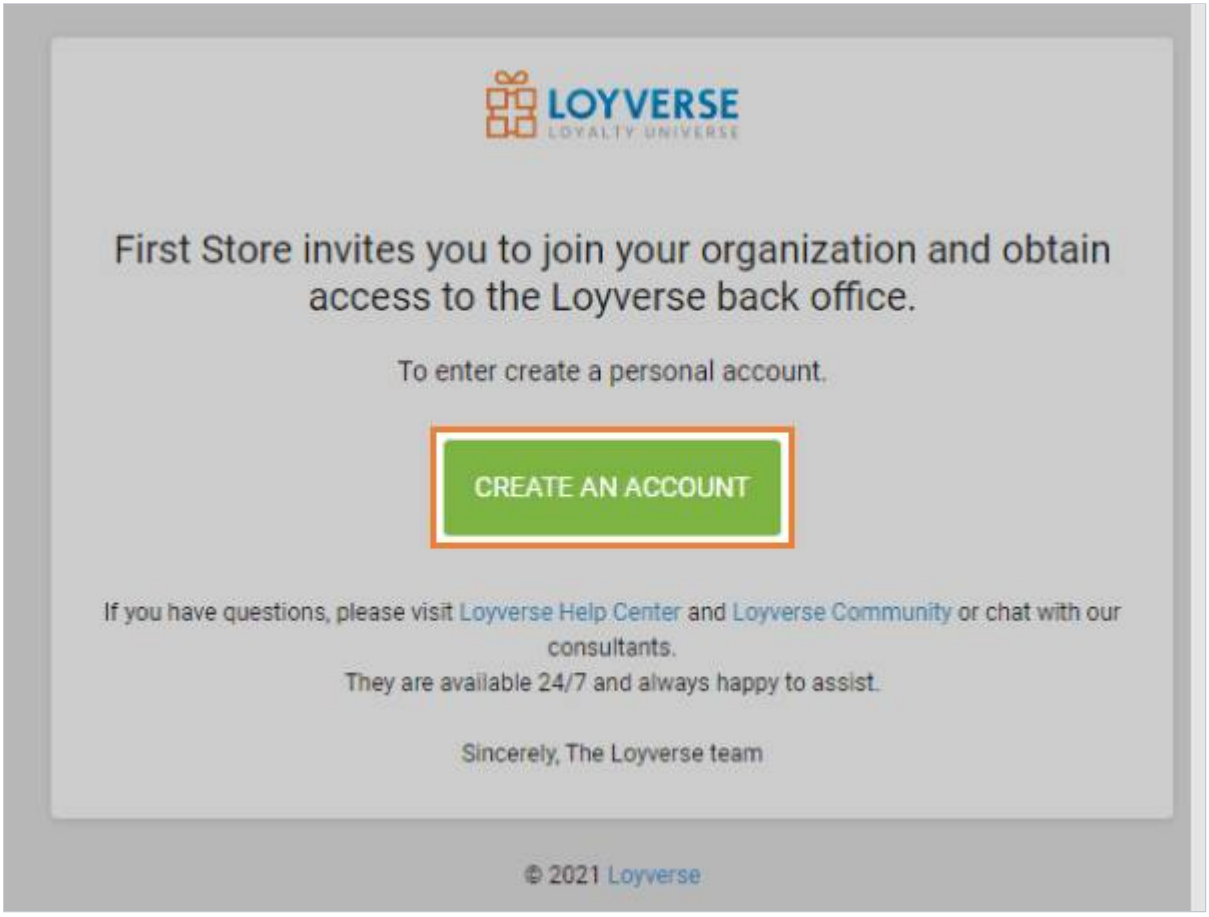
Save the employee profile.

3. Employee Creates Their Password

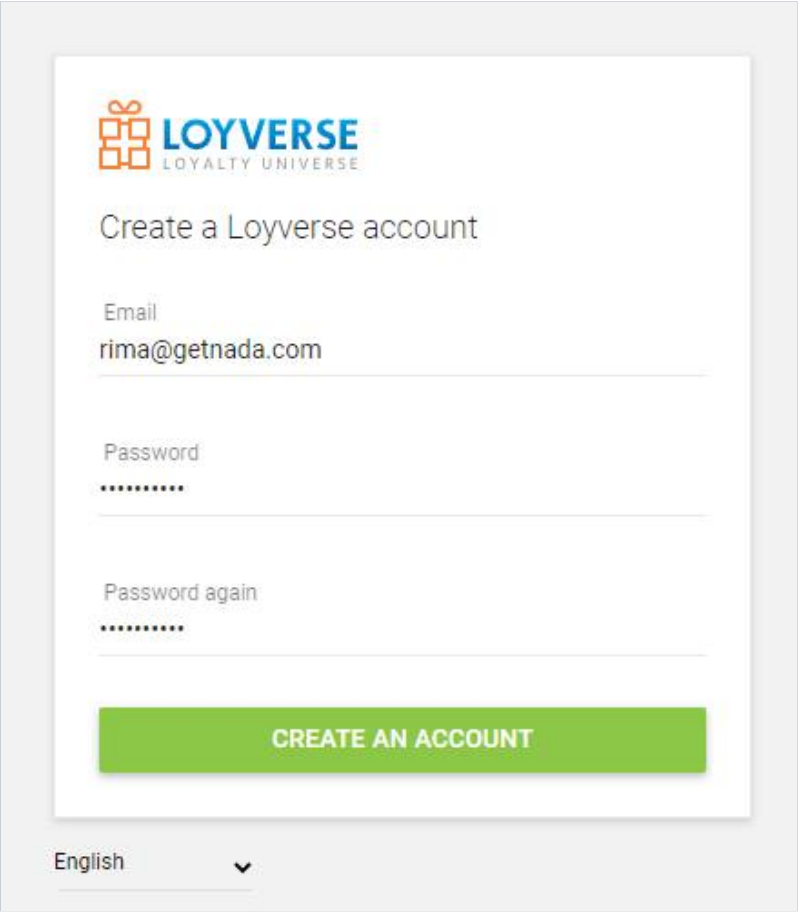
After saving the employee record, the system sends an invitation email.

The employee should:

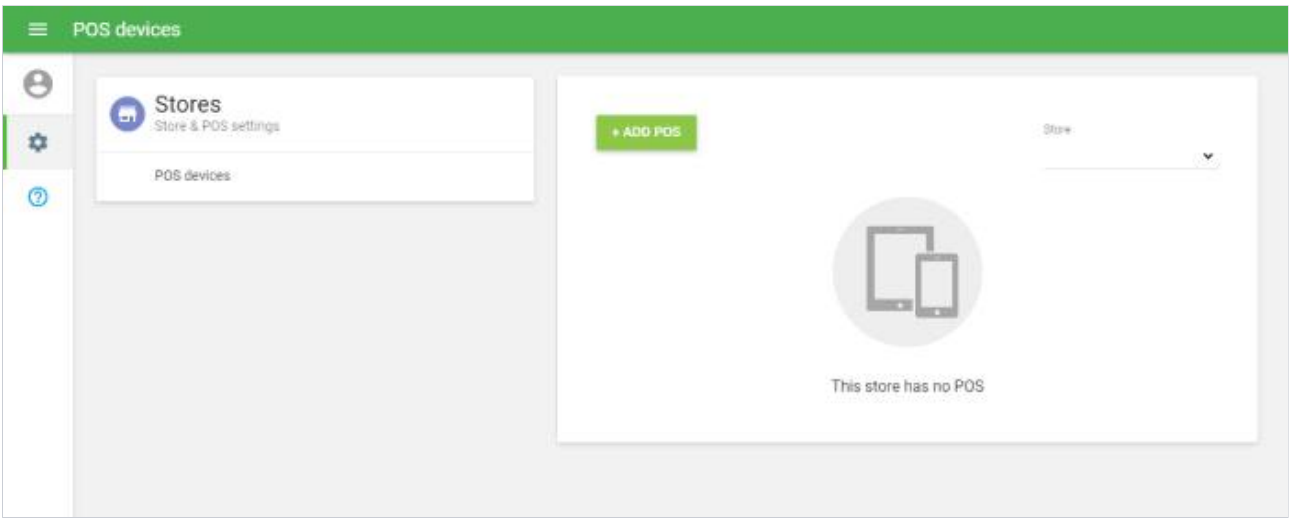
Open the email and click **Create an account**.



Set a password in the registration form.



Log in to the Back Office for the first time.



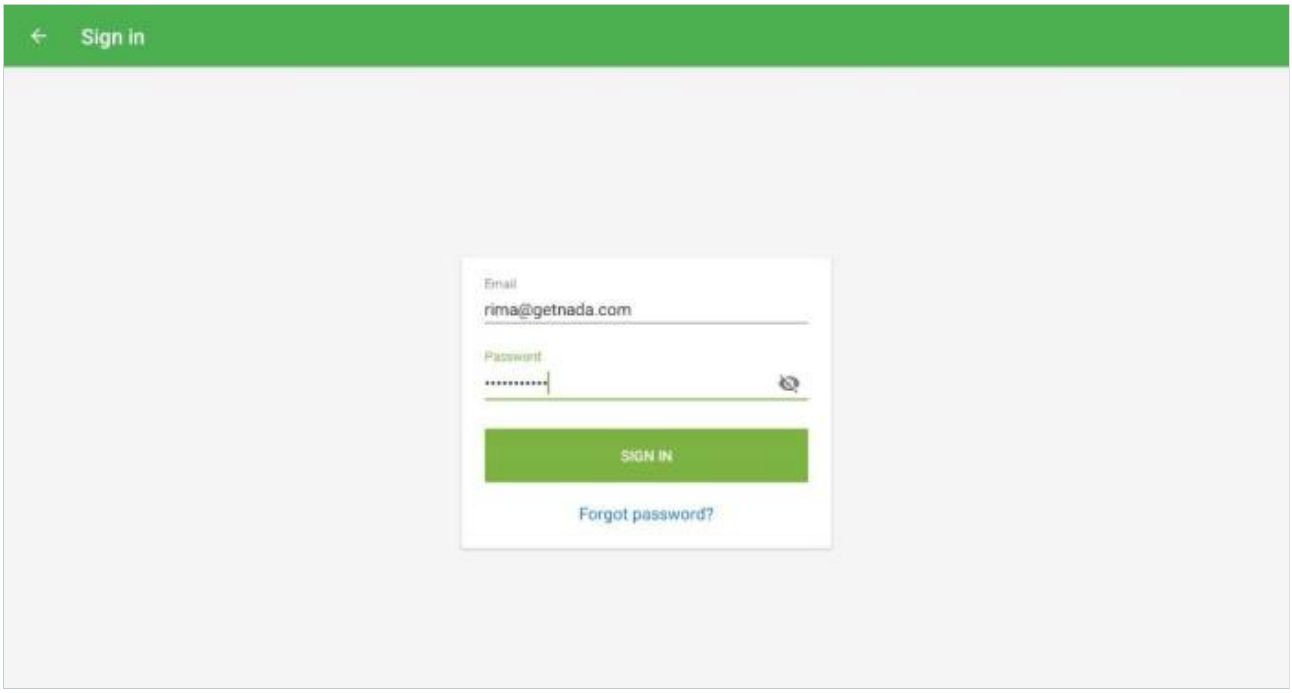
Once the employee logs in successfully, the account is activated.

If you didn't assign any additional permissions to the role, the employee will only see the **POS devices** section.

4. Logging in to Loyverse POS

The employee can now log in to the Loyverse POS mobile app using:

- Their **email address**
- The **password** they created



This is required only for the first login to connect the employee to the POS device.

After the POS is connected, the employee will continue to use their **PIN code** for:

- Re-entering the POS after the screen is locked or the app is awakened
- Switching between employees
- Accessing the POS interface

See also:

How to Add an Employee in Loyverse

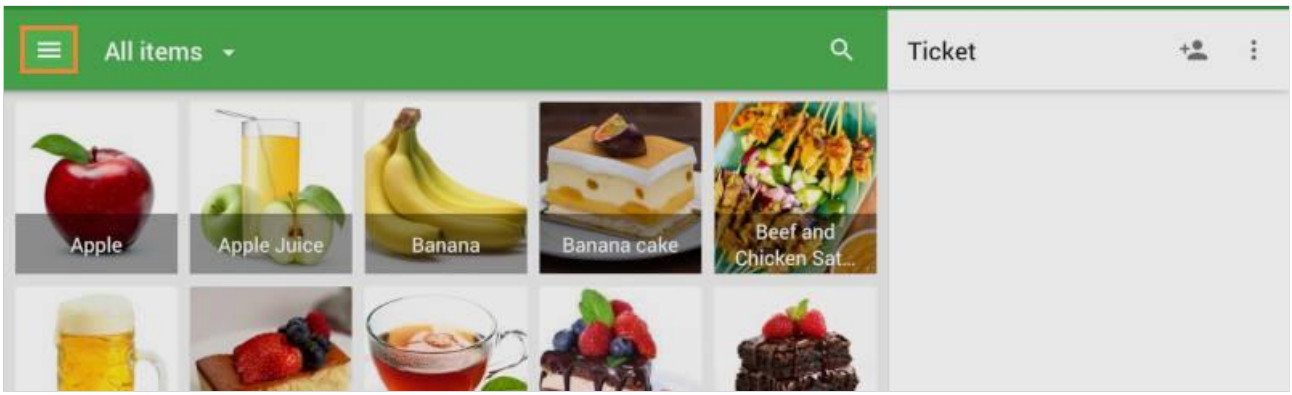
How to Switch User Account to Different Employee in the Opened Loyverse POS

Video
https://www.youtube.com/watch?v=DxzBChXDobw

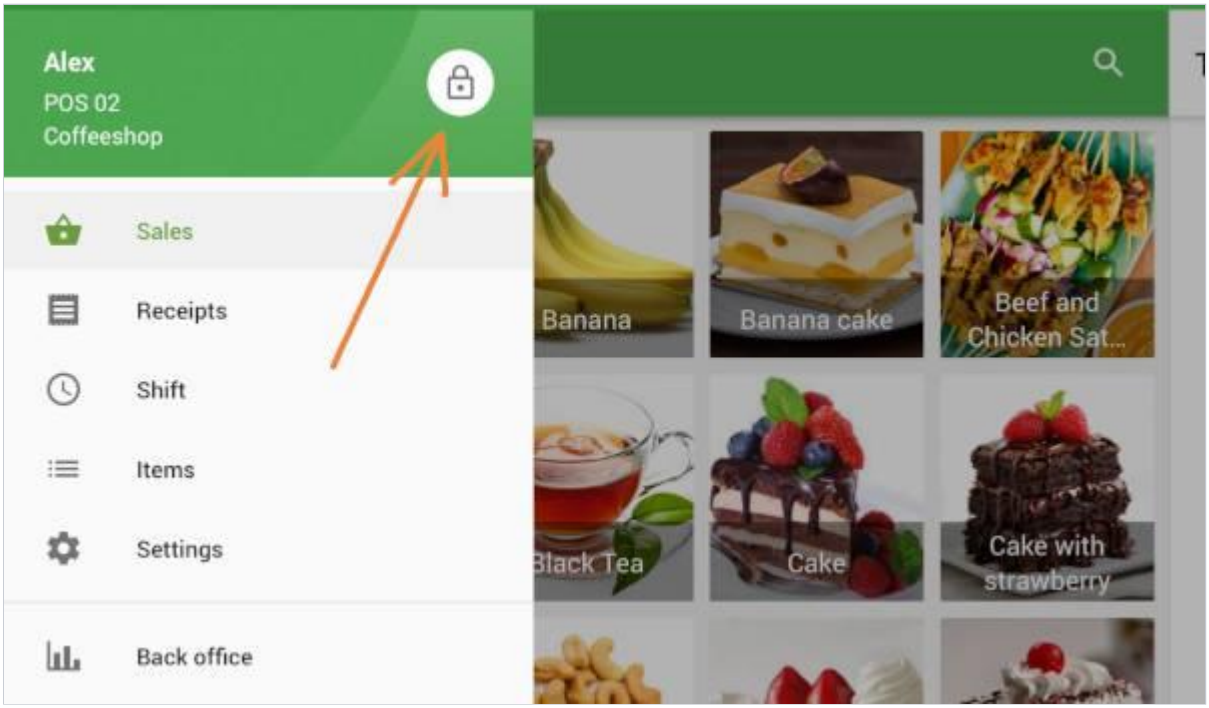
If you need to switch to another employee account without closing the Loyverse POS app(Play Market or App Store), you can easily do so with just a few steps. This is useful when multiple staff members use the same device during a shift.

How to Switch Users

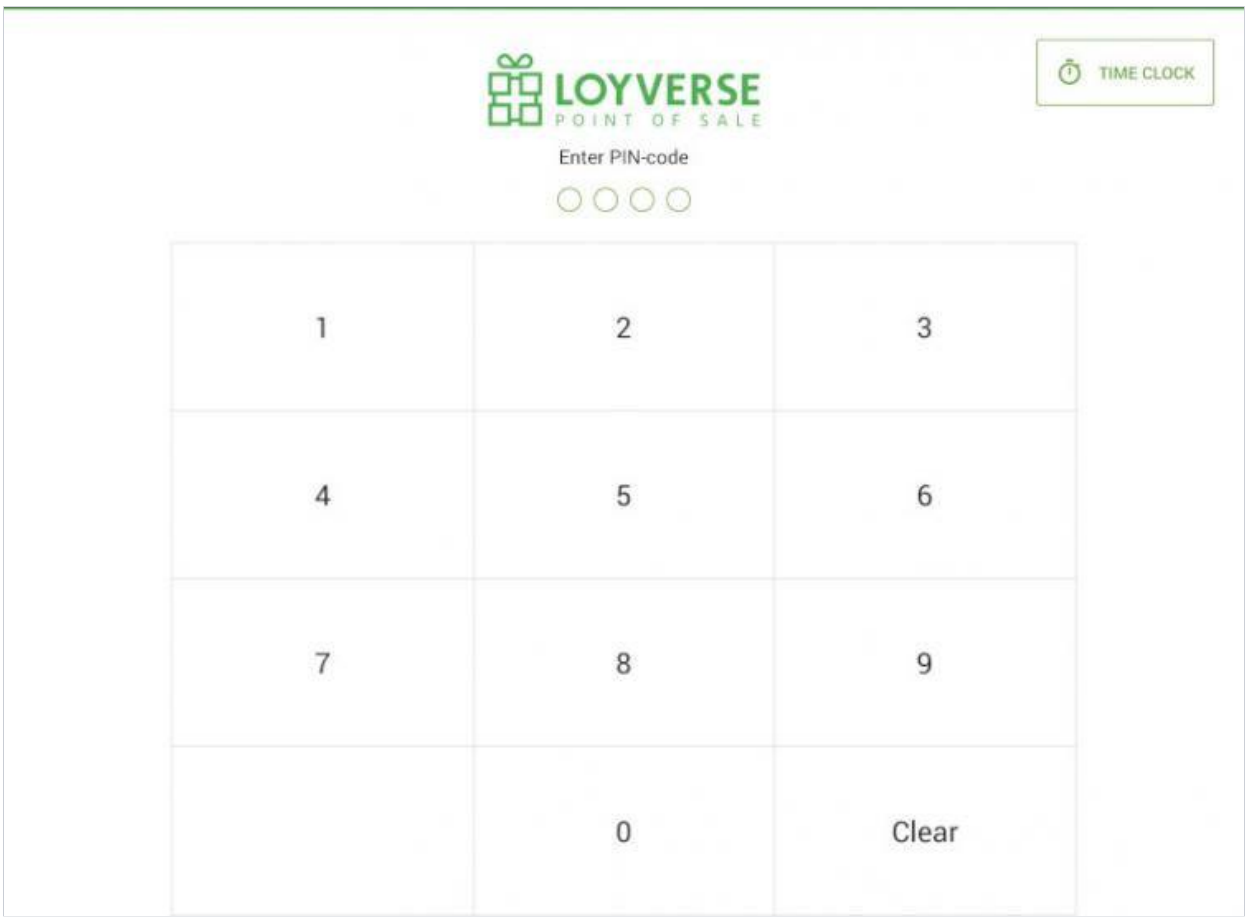
Open the **Menu** in the Loyverse POS app.



Tap the **lock icon** to log out the current user.

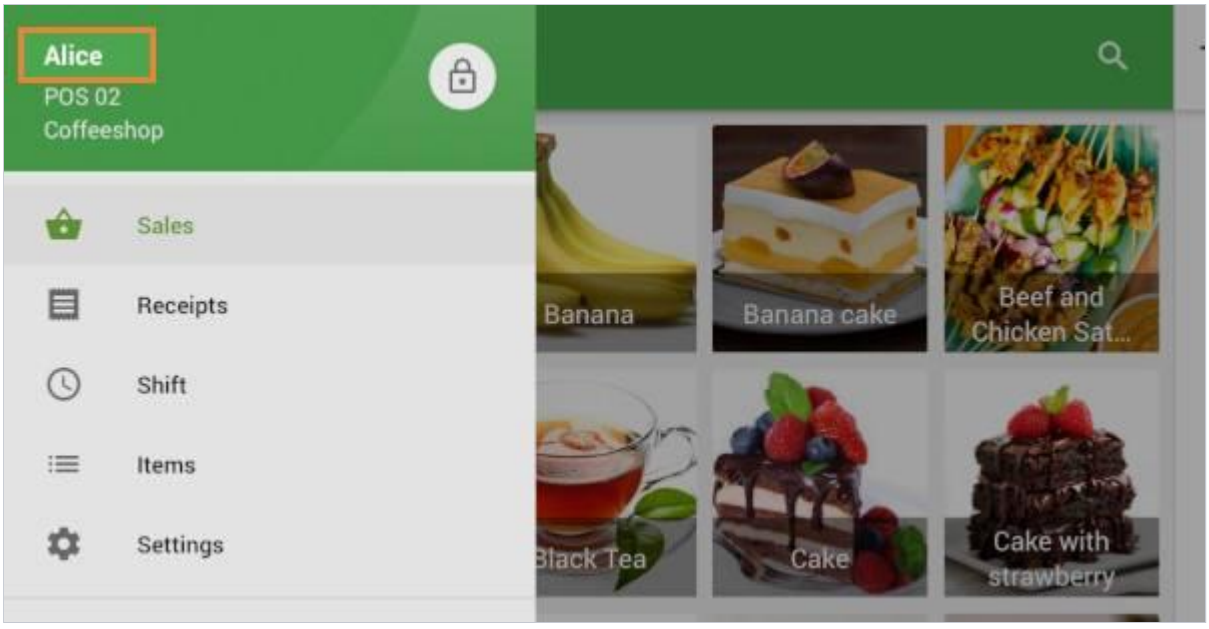


The PIN pad will appear.



The next employee can enter **their personal PIN** to sign in.

Once the PIN is confirmed, the app will automatically switch to the new user account. The active employee's name will be displayed in the menu header so you can always see who is currently logged in.



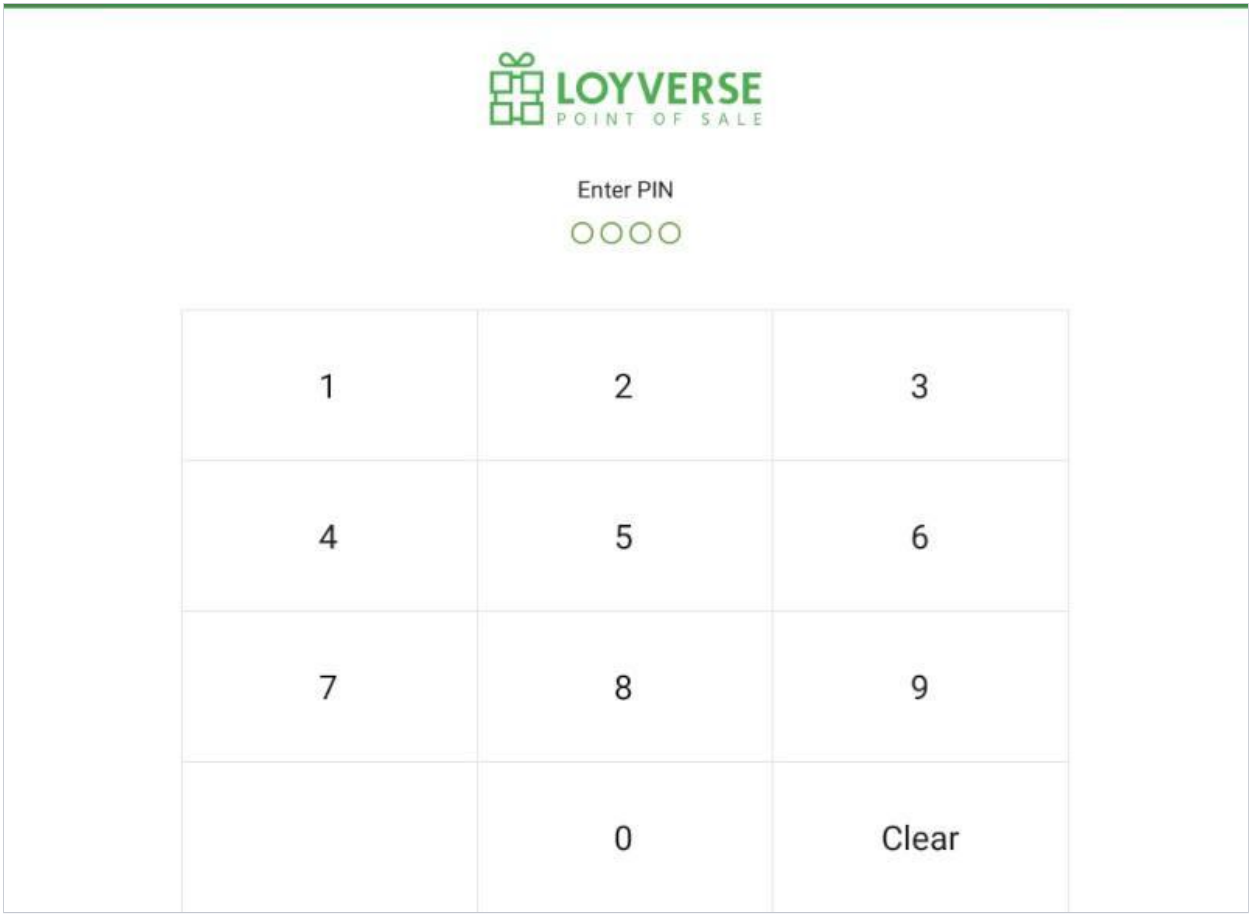
Tip
Employee switching is quick and secure, allowing seamless work across shifts while keeping sales activity tracked by staff member.

See also:

How to Add an Employee in Loyverse POS

How to Manage PIN Code Access

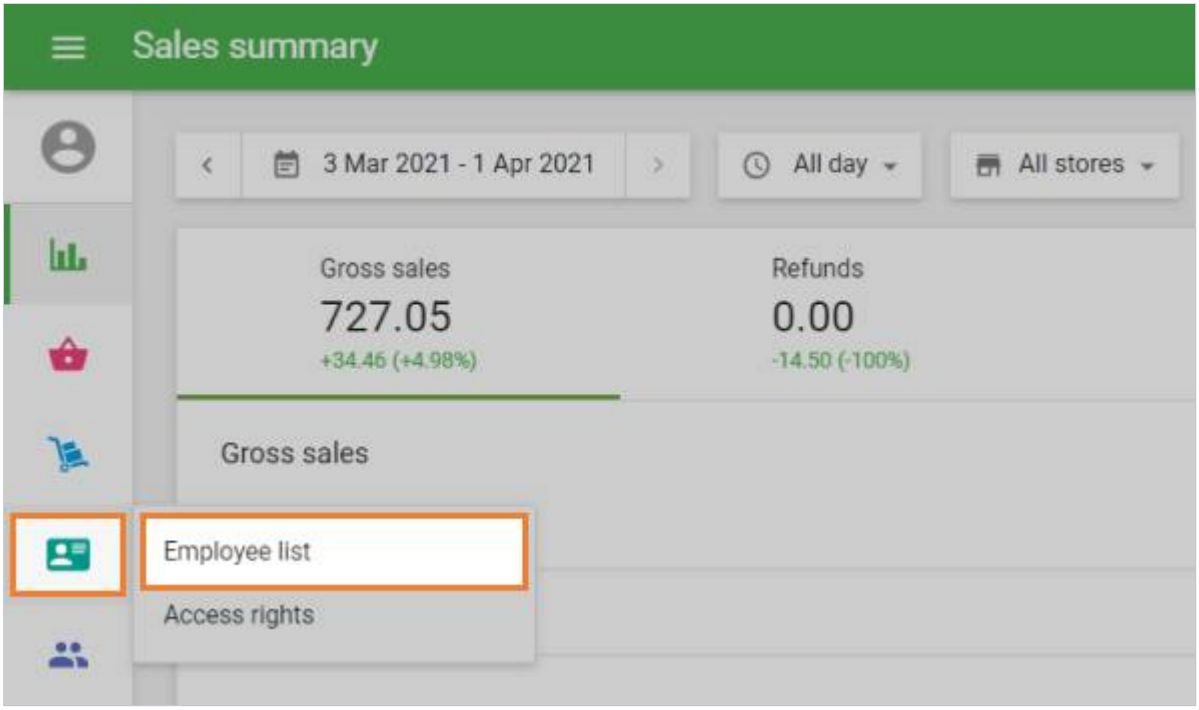
A **PIN code** is required to access Loyverse POS.
The PIN entry screen appears each time a user logs into the POS, switches users, or when the device wakes from sleep mode.



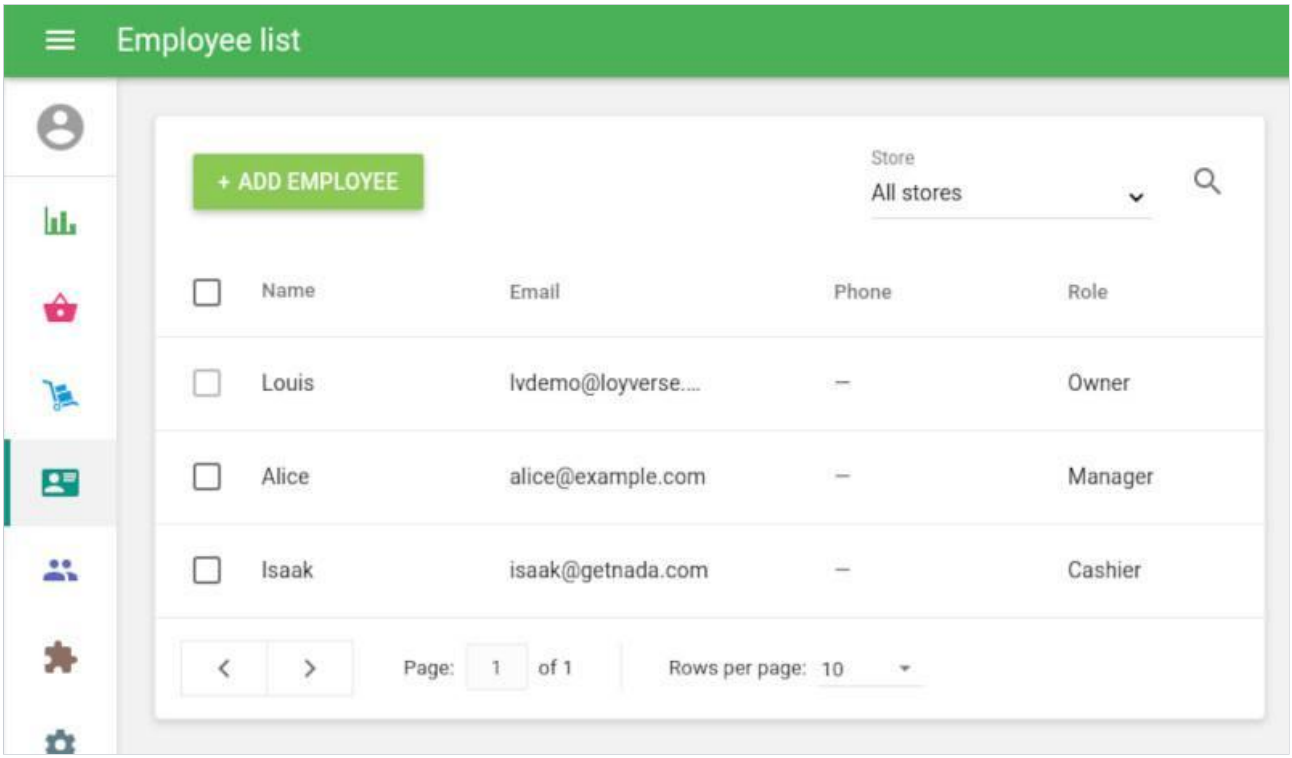
Every Loyverse POS user — **owner or employee** — must have a **unique 4-digit PIN** that identifies them on the POS.
PIN access is created while adding an employee to the system and can be changed at any time from the Back Office.

How to View or Change an Employee PIN

Log in to the **Back Office** and open **Employees → Employee List**.

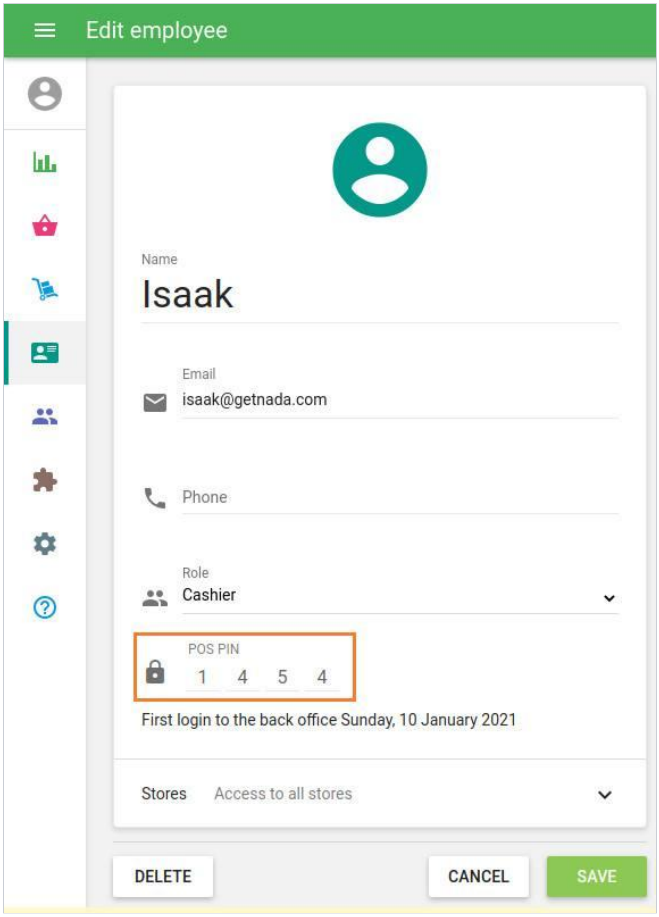


Select the employee whose PIN you want to manage.



In the **POS PIN** field you can:

- View the employee's current PIN
- Enter a new 4-digit PIN to replace the existing one



Note: Only the account owner or users with assigned access to Employee Management can view or change PIN codes.

Click **Save** to apply the changes.

How to Disable the PIN Code (Owner Only)

POS login without a PIN is only allowed when:

- There is **no employee added** (only the owner exists), and
- The **Time Clock feature is disabled**

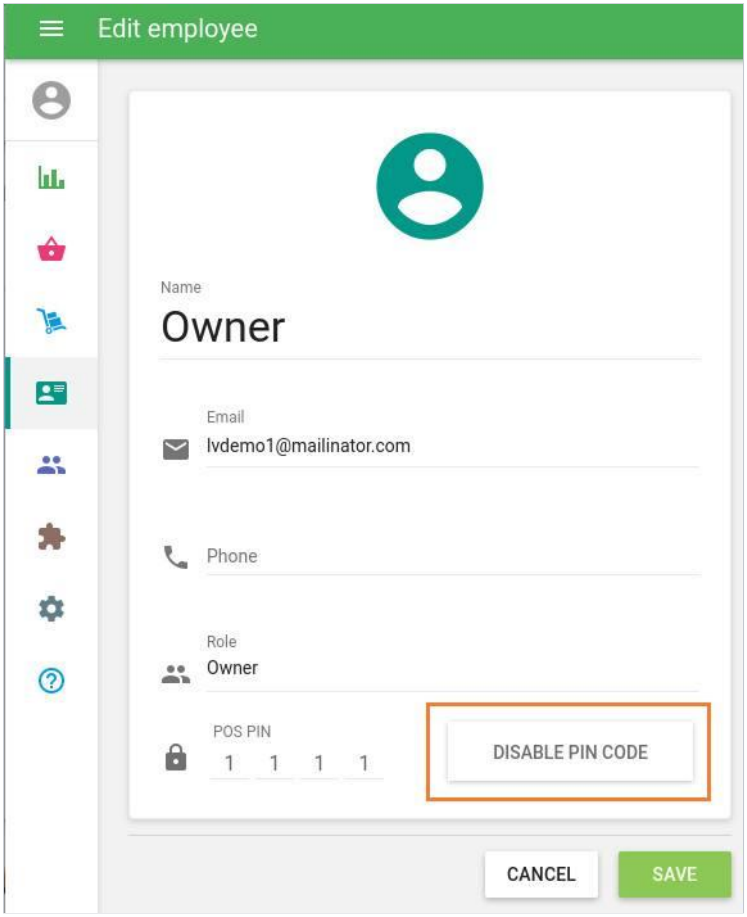
If an employee account exists OR Time Clock is active → **PIN is mandatory**.

To disable the owner PIN:

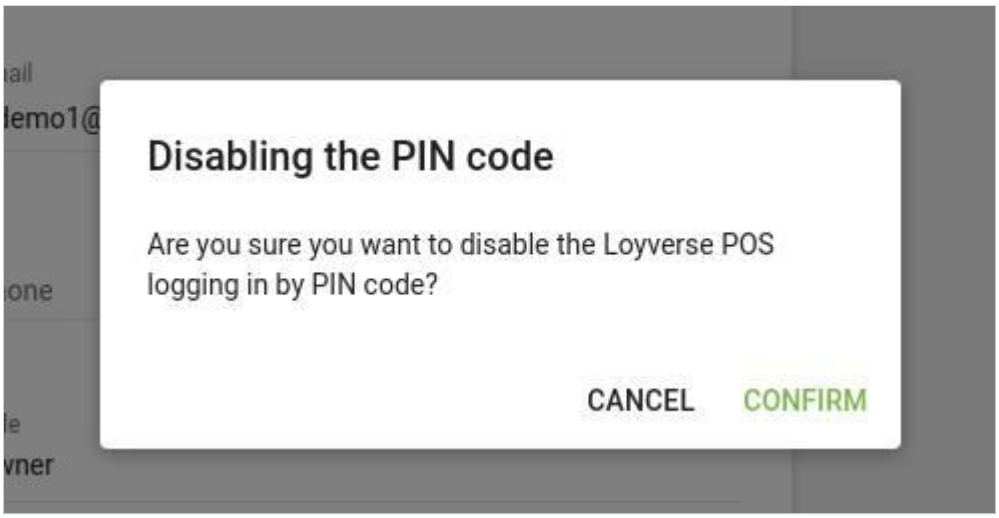
Open **Employees → Employee List** in the Back Office.

Select the **Owner** account.

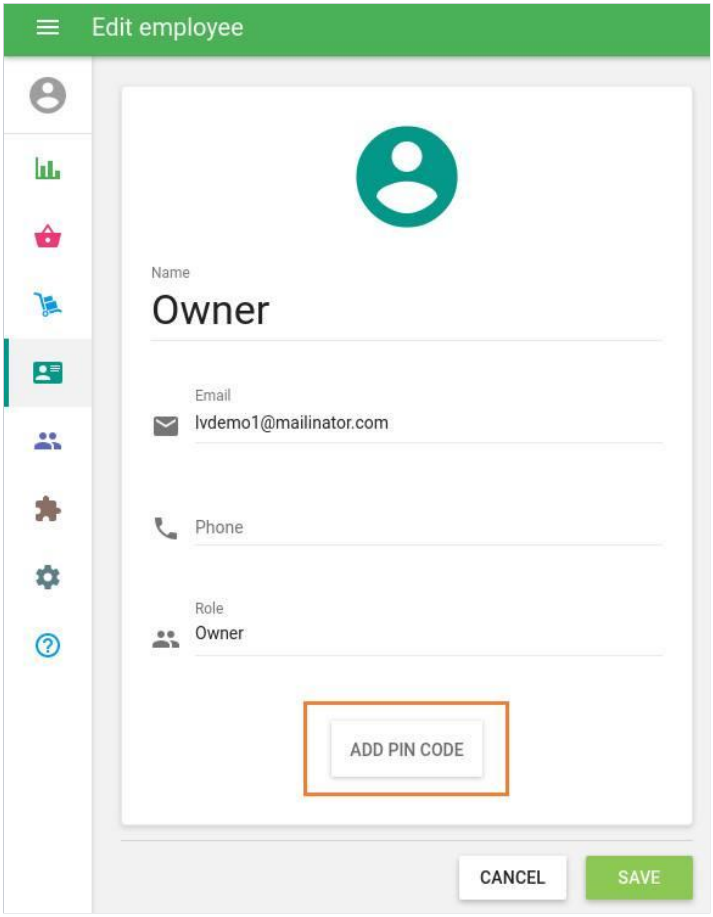
Click **Disable PIN Code**.



Confirm the action in the pop-up dialog.



You can restore the PIN anytime using the **Add PIN** code button.



Security Recommendation

Change employee PINs periodically and update them immediately if staff changes occur — this keeps your POS system secure and prevents unauthorized access.

See also:

How to Add an Employee in Loyverse POS

Using Time Clock to Track Employees Hours

Video
https://www.youtube.com/watch?v=yPtmrV7QOk4

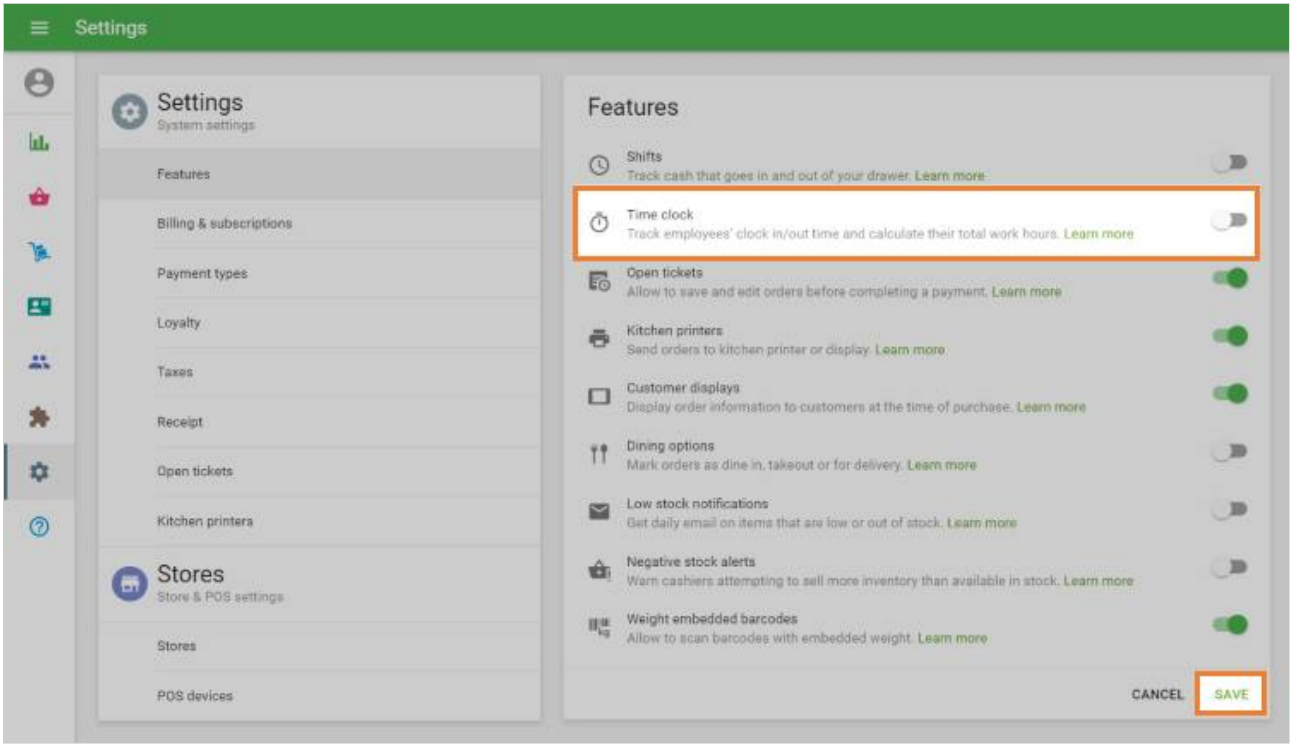
The **Time Clock** feature allows employees to clock in and clock out at the POS, while Loyverse automatically calculates their total working hours.

1. Configuration

To enable the Time Clock feature:

Log in to the **Back Office**.

Go to **Settings → Features**.



Enable the **Time clock** option.

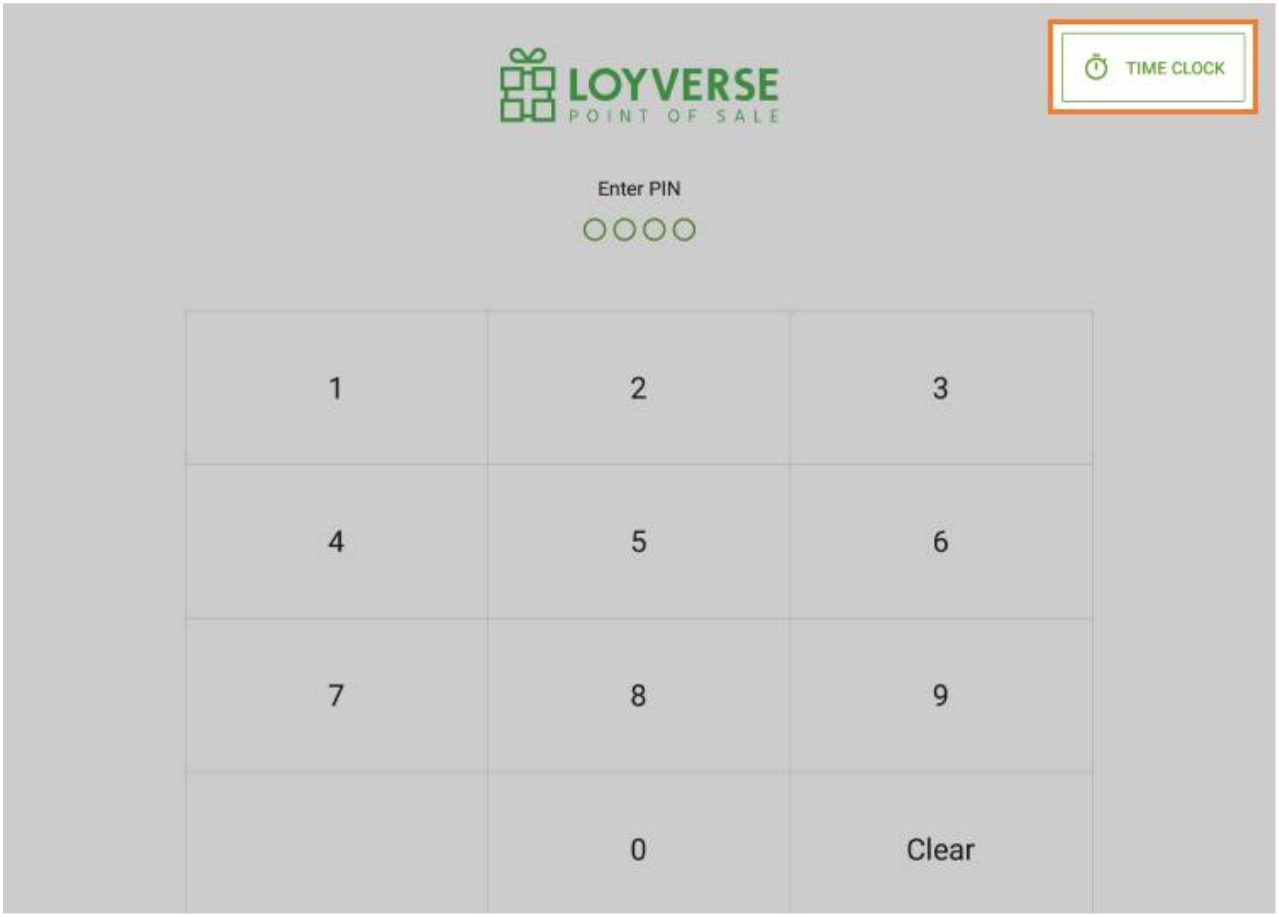
Click **Save**.

Note:
The Time Clock feature requires **PIN authentication**. Each employee must have a PIN set to access the Loyverse POS app.

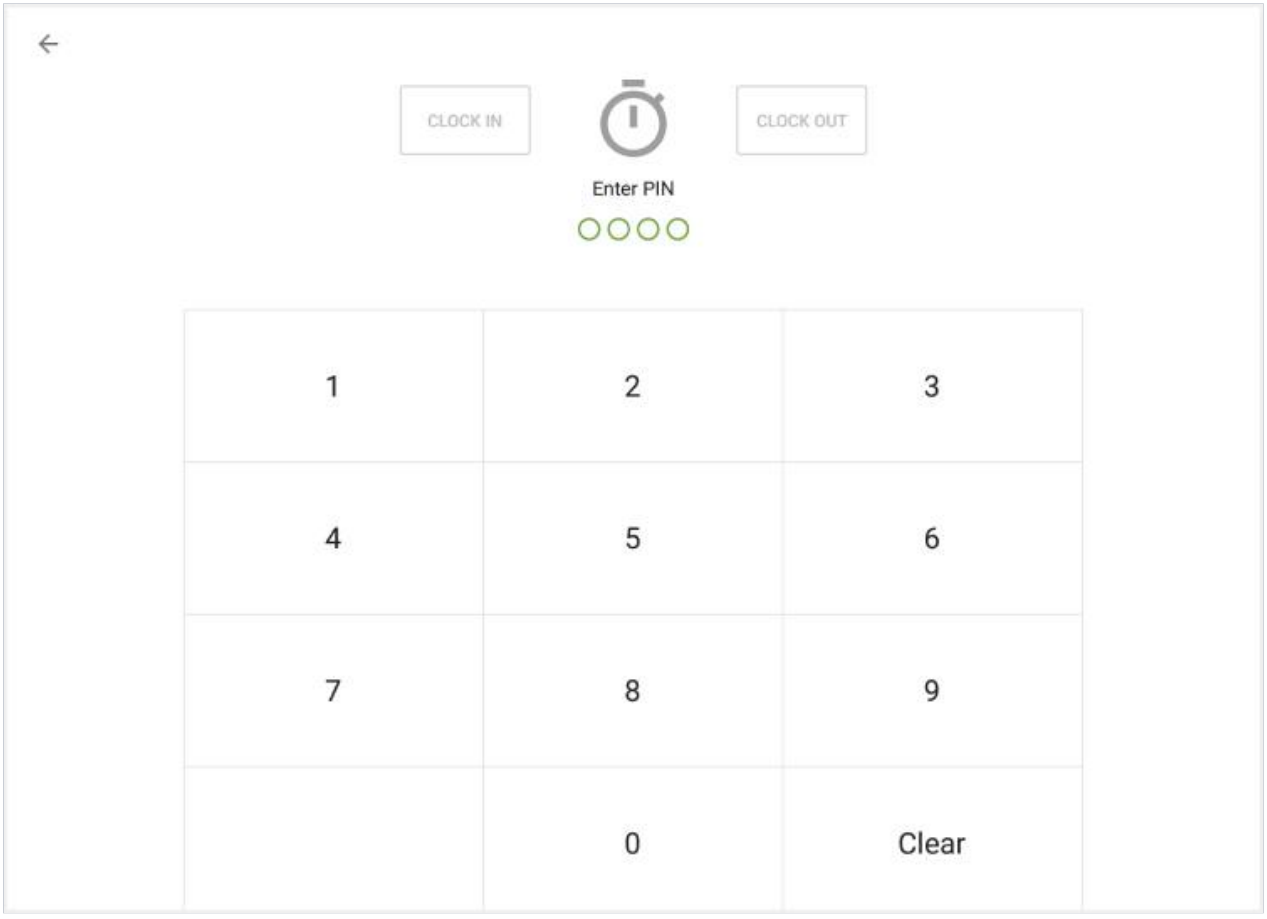
2. Using Time Clock at the POS

Open the **Loyverse POS app**.

On the login screen, tap the **Time clock** button in the top-right corner.



Enter the employee **PIN code**.



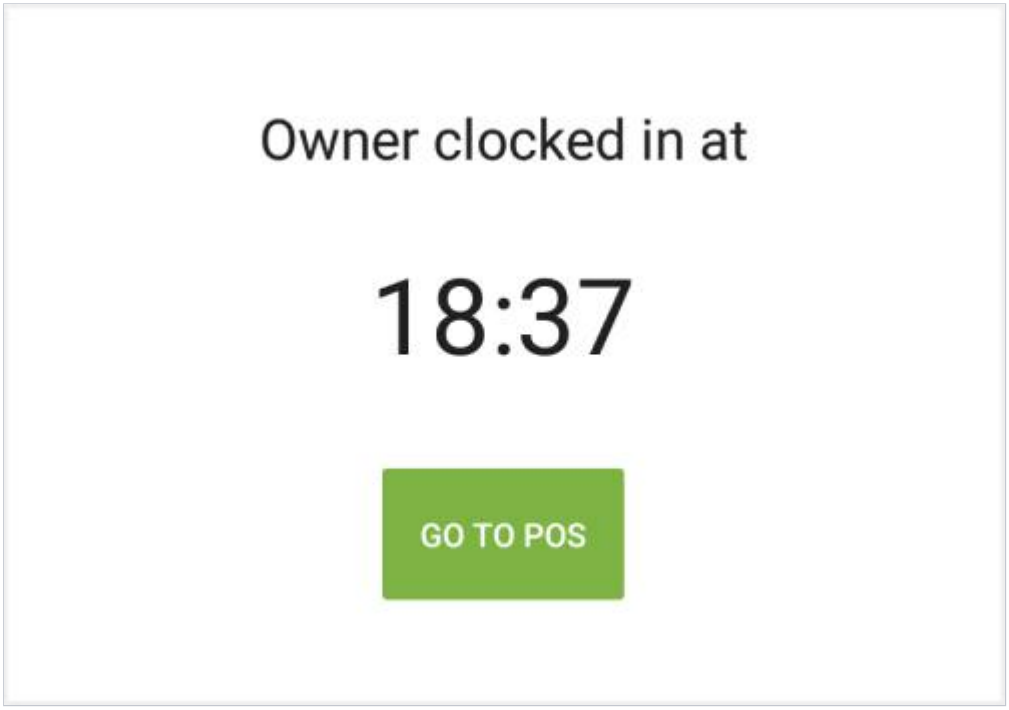
Once authenticated, the **Clock In** and **Clock Out** buttons become active.

Clocking In

Tap **Clock In** to start tracking work time.



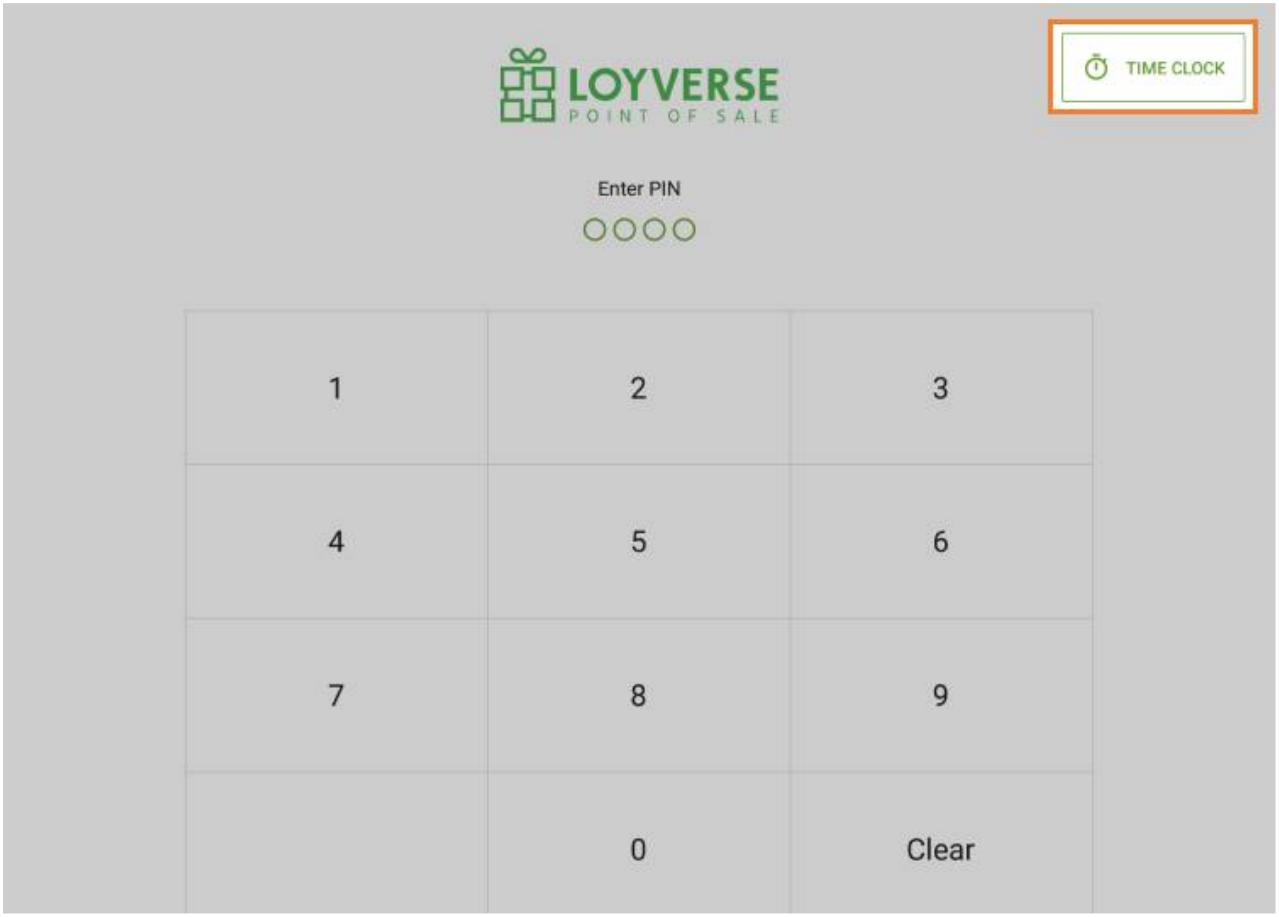
The app will display the **clock-in time**.



Tap **Go to POS** to proceed to the sales screen, or use the back arrow to return to the login screen.

Clocking Out

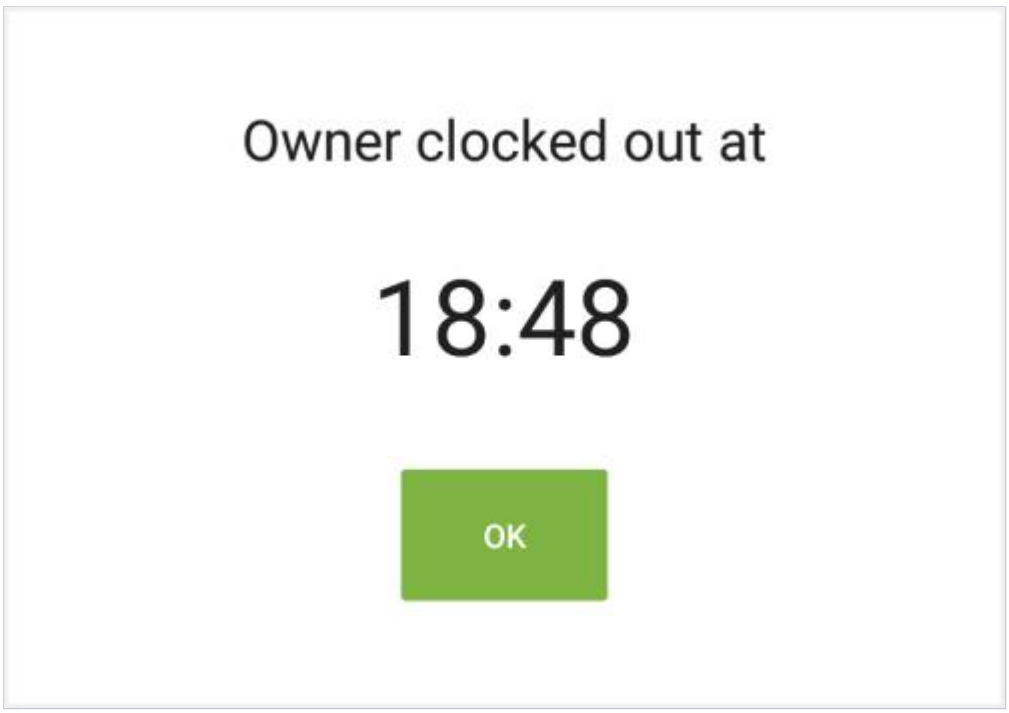
At the end of the work shift, open the **Time clock** screen again.



Tap **Clock Out** to record the time punch.

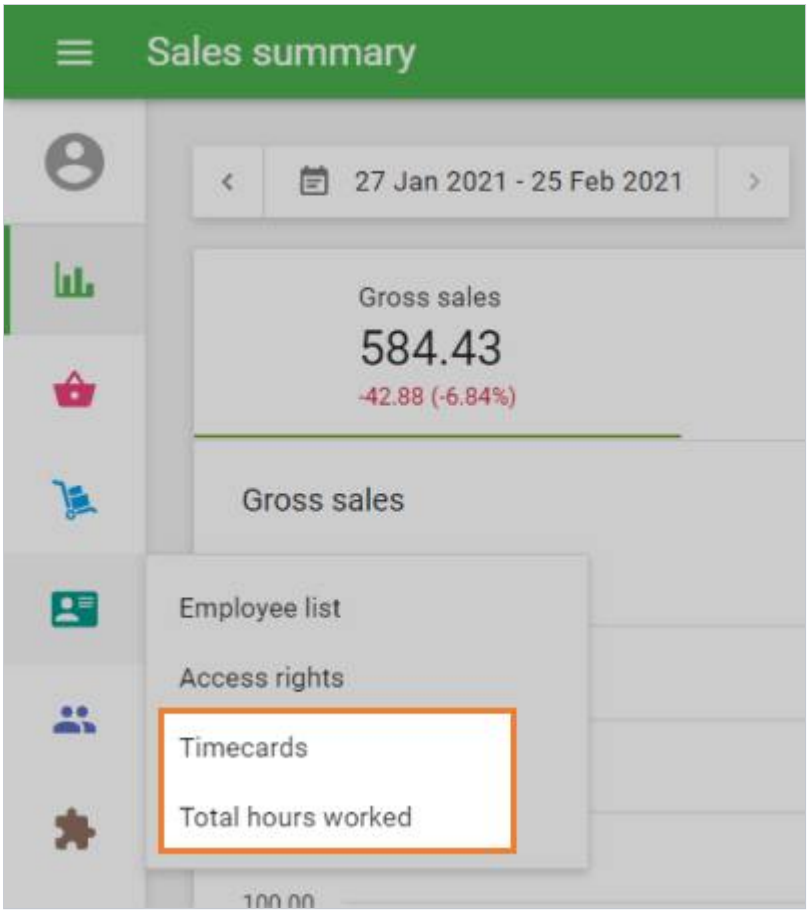


Review the **clock-out time** and tap **OK** to confirm.



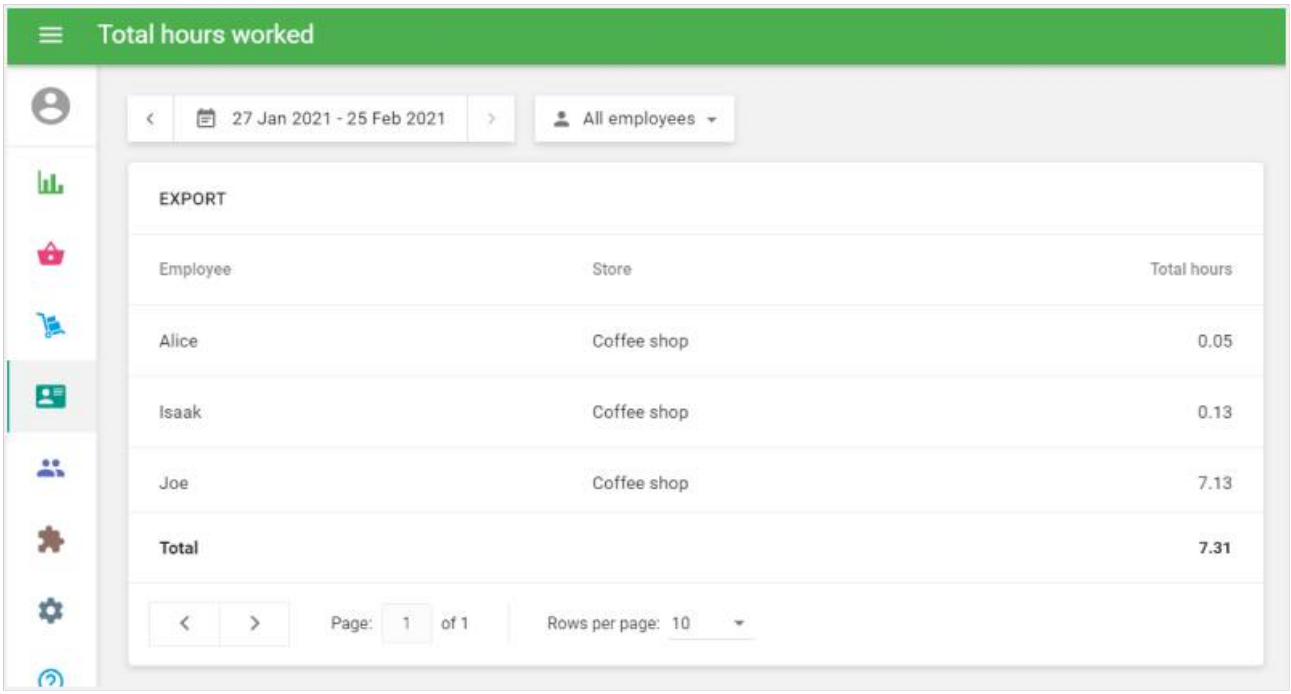
3. Time Clock Reports in the Back Office

You can view and manage time tracking data in the **Employees** section of the Back Office. Two reports are available:



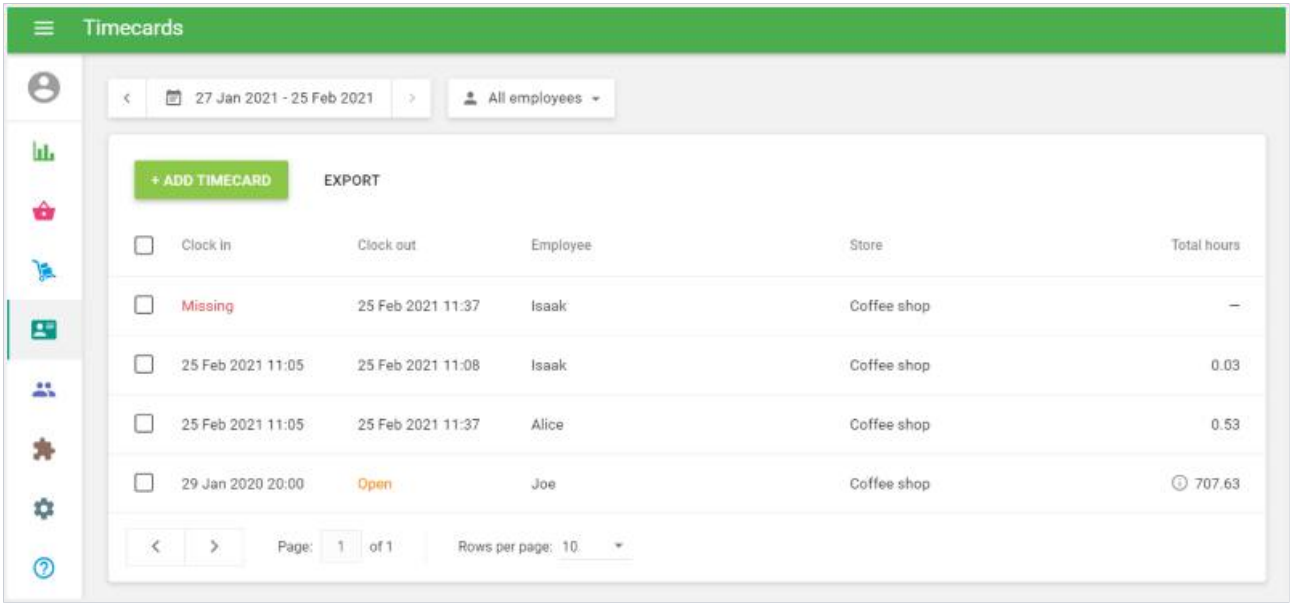
Total Hours Worked

Displays a **summary of total working hours** for each employee within the selected period.



Timecards

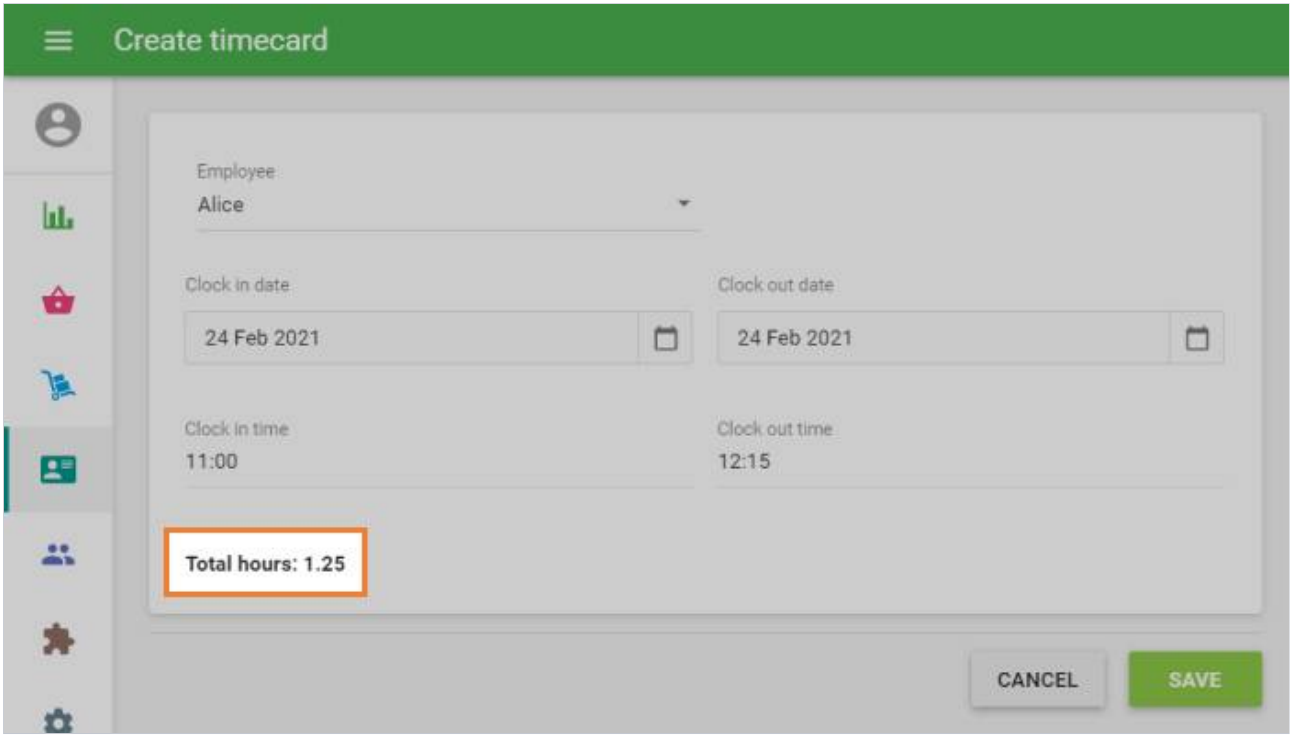
Shows a **detailed list of clock-in and clock-out records**.



You can:

- Edit existing timecards
- Add a new timecard by clicking **Add Timecard**

Total hours are calculated automatically based on clock-in and clock-out times.



Note:
The value shown in **Total Hours** is a **fraction of an hour**, not minutes (for example, 0.25 = 15 minutes).

See also:

[How to Add an Employee in Loyverse POS]

[Shift Management in Loyverse POS]

Customers

How to Set Up a Customer Loyalty Program

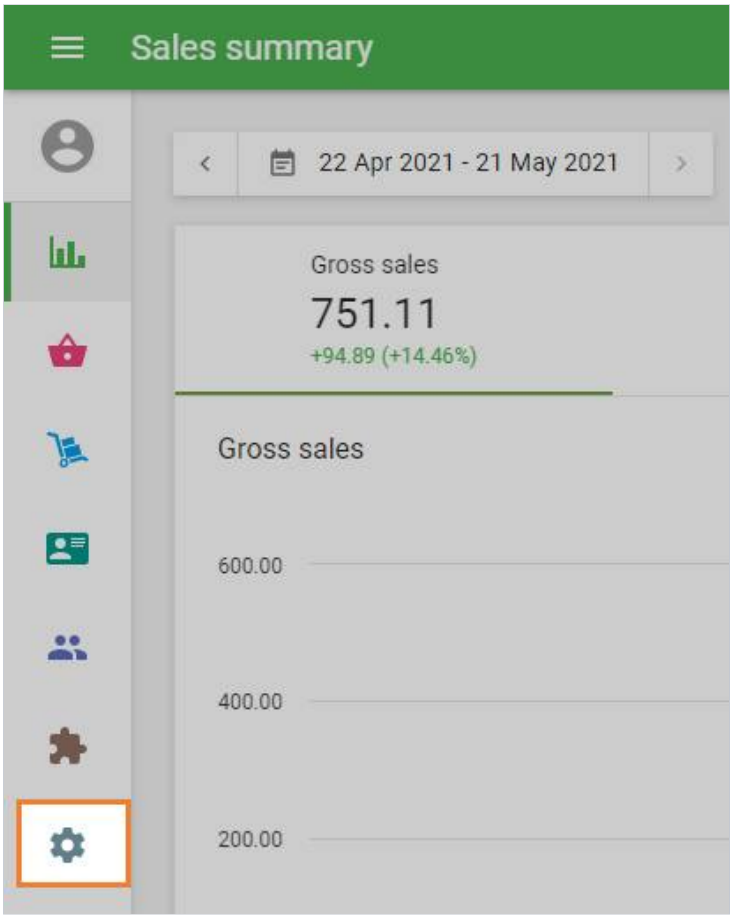
Video
https://www.youtube.com/watch?v=T6MHkk4cZrU

A customer loyalty program helps motivate repeat purchases by rewarding customers with points for every sale. With Loyverse POS, setting up a loyalty program is simple and flexible.

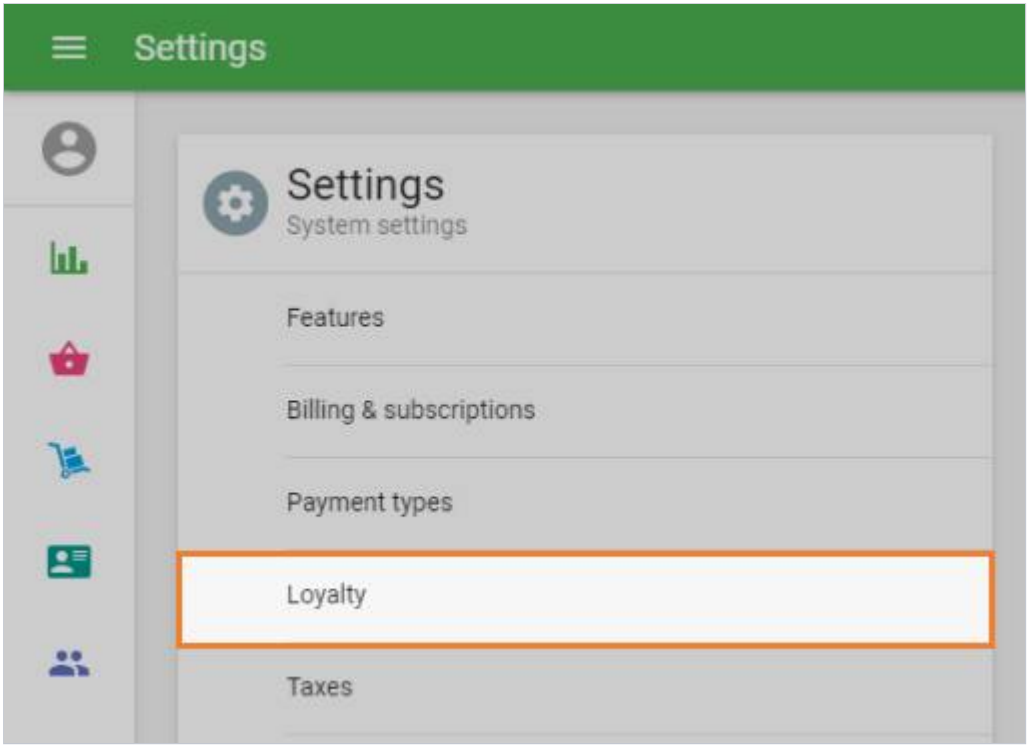
Step 1: Enable the Loyalty Program

Log in to the **Back Office** of your Loyverse account.

Navigate to the **Settings** menu.

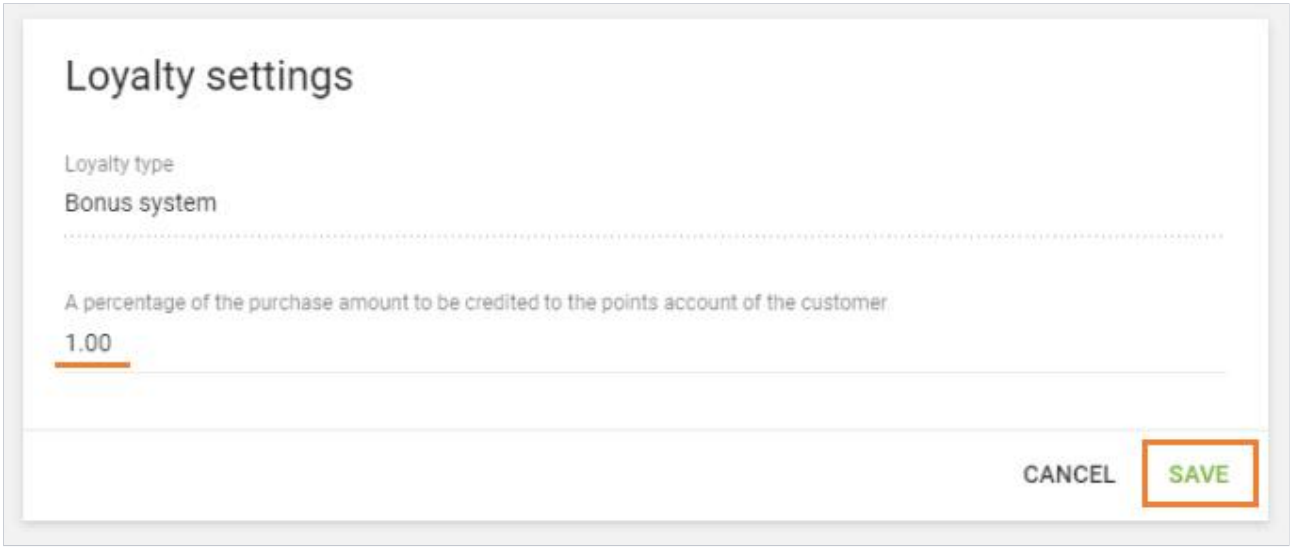


Click on the '**Loyalty**' option.



Step 2: Configure the Program

By default, the loyalty program gives **1 point for every 100 currency units** (e.g., dollars, euros) spent — this corresponds to a **1%** reward rate.



You can adjust the percentage to suit your needs. For example:

- 2% → 2 points per $100 spent
- 5% → 5 points per $100 spent

1 point = **1 unit of currency** (e.g., $1, €1) when redeemed for a discount.

Don’t forget to click ‘**Save**’ after setting your preferred percentage.

Step 3: Start Using the Loyalty Program

Customers earn points automatically when they're added to a sale.

You can add new customers directly from the POS or create them in advance through the '**Customers**' section in the Back Office.

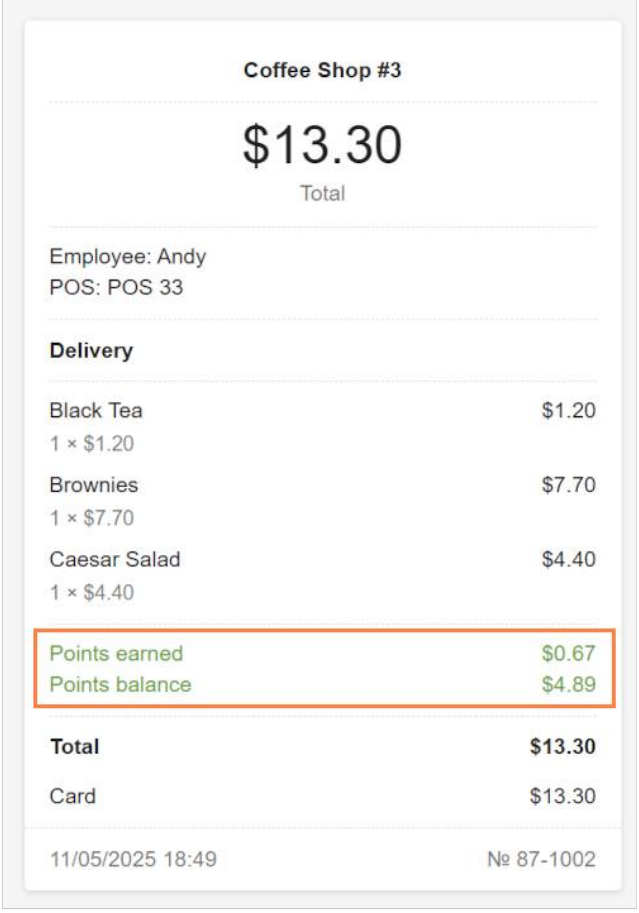
Redeeming Points

When a customer wants, they can use points to redeem them for a discount during checkout.

For example, if a customer has 10 points, they can redeem them for a $10 discount on their next purchase.

Loyalty Program Visibility

Customers can see their accumulated points on the **printed or emailed receipts**.



Employees will see a customer's available points on the POS screen once the customer is added to the ticket.

Important Notes

- The loyalty program applies to **all POS devices and all stores** in your account. Customers can **earn and redeem points across all stores** in your chain.

- Loyalty points are only available for **registered customers**.

A well-configured loyalty program builds stronger relationships with customers and keeps them coming back. With Loyverse POS, it's easy to implement and manage — even across multiple store locations.

See also:

How to Sign Up a Customer in Loyverse POS

How to Redeem Customer Points for a Discount

How to Sign Up a Customer in Loyverse POS

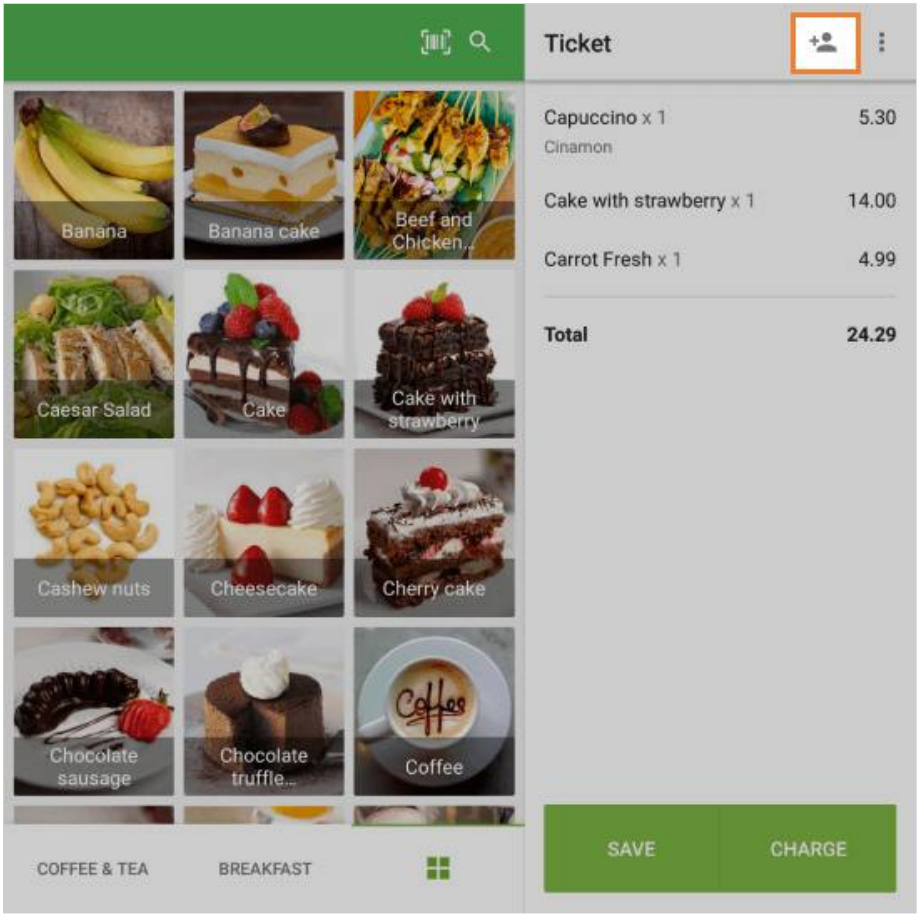
Video
https://www.youtube.com/watch?v=T6MHkk4cZrU

Loyverse POS allows you to link sales with specific customers. This feature enables you to:

- Send digital receipts via email
- Track customer purchase history
- Award loyalty points if a loyalty program is activated

1. Add a Customer During a Sale

While making a sale in the Loyverse POS app, you can add a customer to the ticket:
Tap the '**Add client**' icon at the top right corner of the sale screen.



2. Create a New Customer

In the pop-up window:

- You can either select an existing customer or tap '**Add new customer**' to register a new one.

To create a new customer:

- Fill out the '**Create customer**' form.

Name is a required field.

Other fields such as email, phone number, and notes are optional.

- Tap '**Save**' to add the new customer to your database.

3. Add the Customer to the Sale

- After saving, you will see the customer's profile.
- Tap '**Add to ticket**' to link them to the current sale.

4. Proceed with the Sale

- Continue with the transaction as usual.

- On the payment screen, if an **email address** was provided, you will see an option to '**Send receipt**' to the customer.

Note: Loyalty points will be automatically awarded based on your loyalty program settings.

5. Finalize the Transaction

After completing the sale, tap '**New sale**' to record the sale and return to the sales screen.

See also:

How to Set Up a Customer Loyalty Program

Customer Identification by Phone Number

How to Work with Customer Base in the Back Office

How to Add the Customer to the Receipt by Scanning a Barcode

How to Add the Customer to the Receipt by Scanning a Barcode



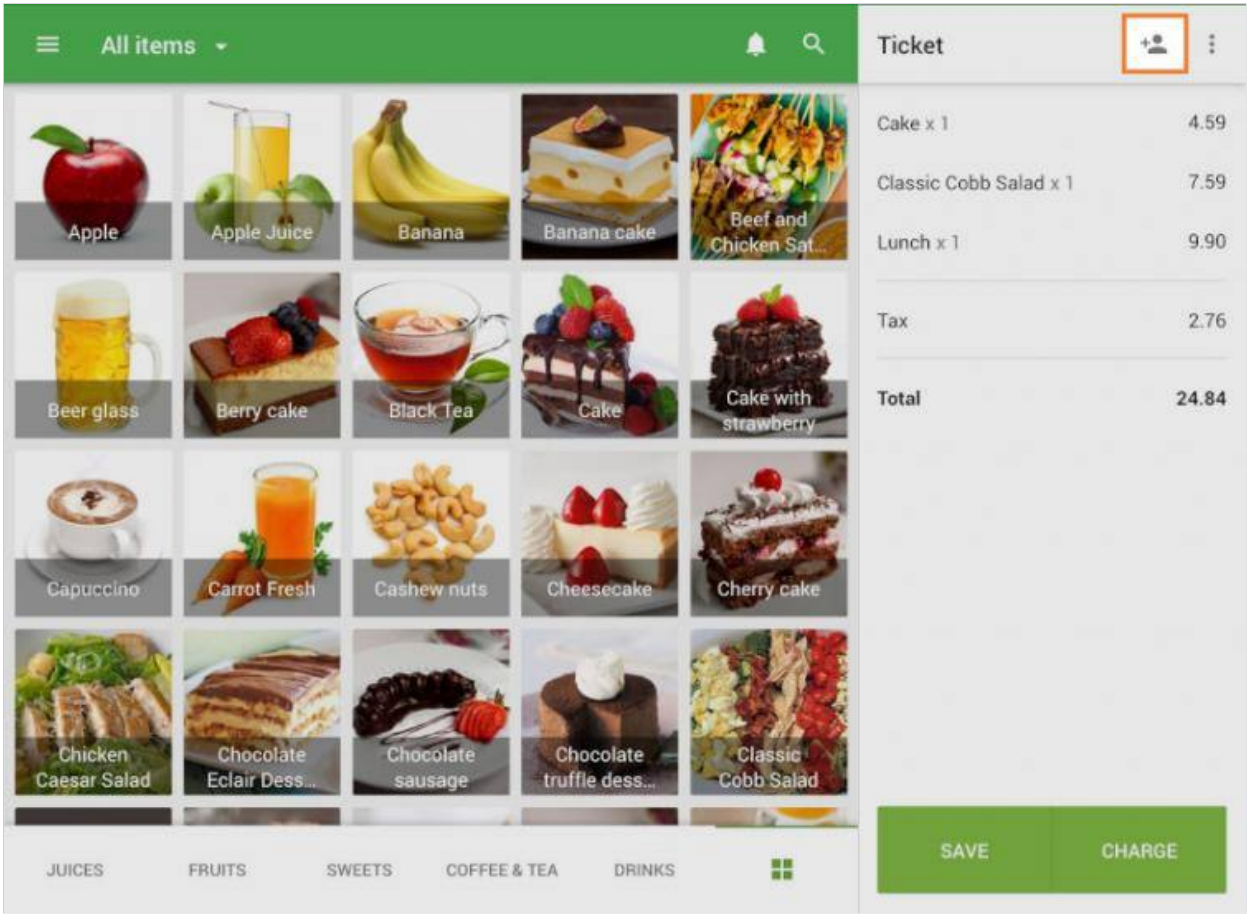
Video
https://www.youtube.com/watch?v=T6MHkk4cZrU

To speed up the sales process and accurately link receipts to customers, Loyverse POS allows cashiers to add customers to a receipt by scanning a barcode from their loyalty card. This can be done using a barcode scanner or the device's built-in camera.

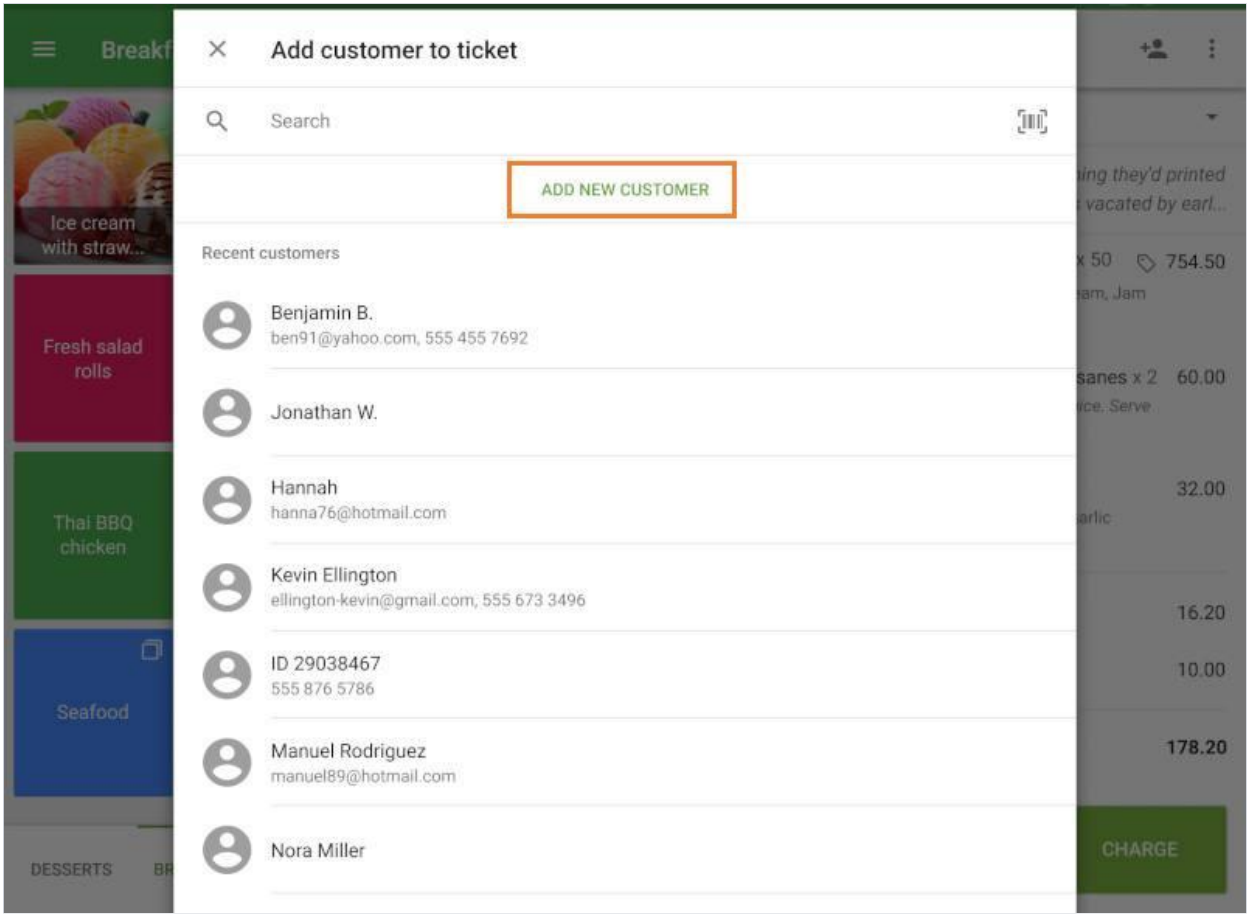
Important: Before scanning a barcode, the customer's unique code must first be saved in their profile.

1. Add a Customer Code During Registration at POS

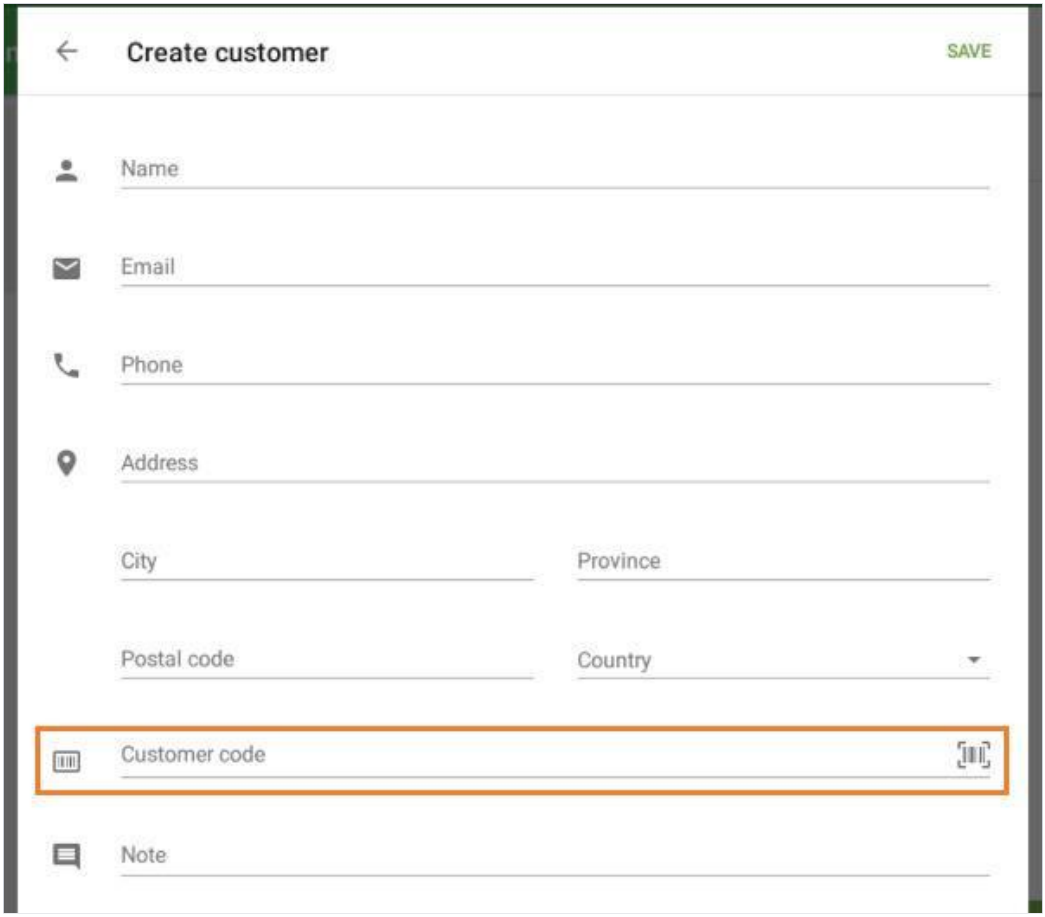
At the sale screen, tap the '**Add client**' icon (top-right corner).



Tap '**Add new customer**'.



In the '**Customer code**' field, enter the barcode value:



- Manually using the keypad,
- With a barcode scanner, or
- By using the built-in camera (ensure the '**Use camera to scan barcode**s' setting is enabled).

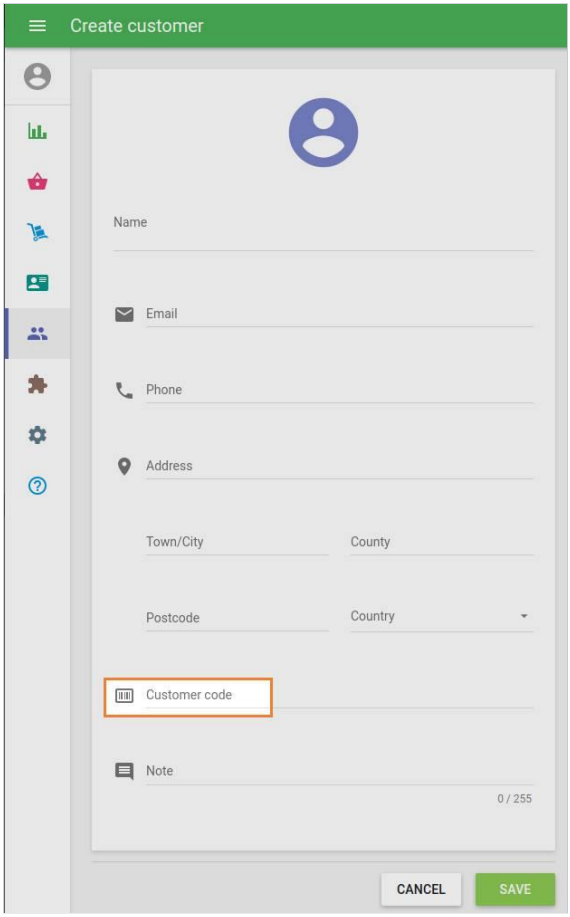
Tap '**Save**' to register the customer with the code.

2. Add or Edit Customer Code from the Back Office

Log in to the Back Office.

Go to **Customers** → open an existing profile or create a new one.

Enter the customer's code in the '**Customer code**' field.



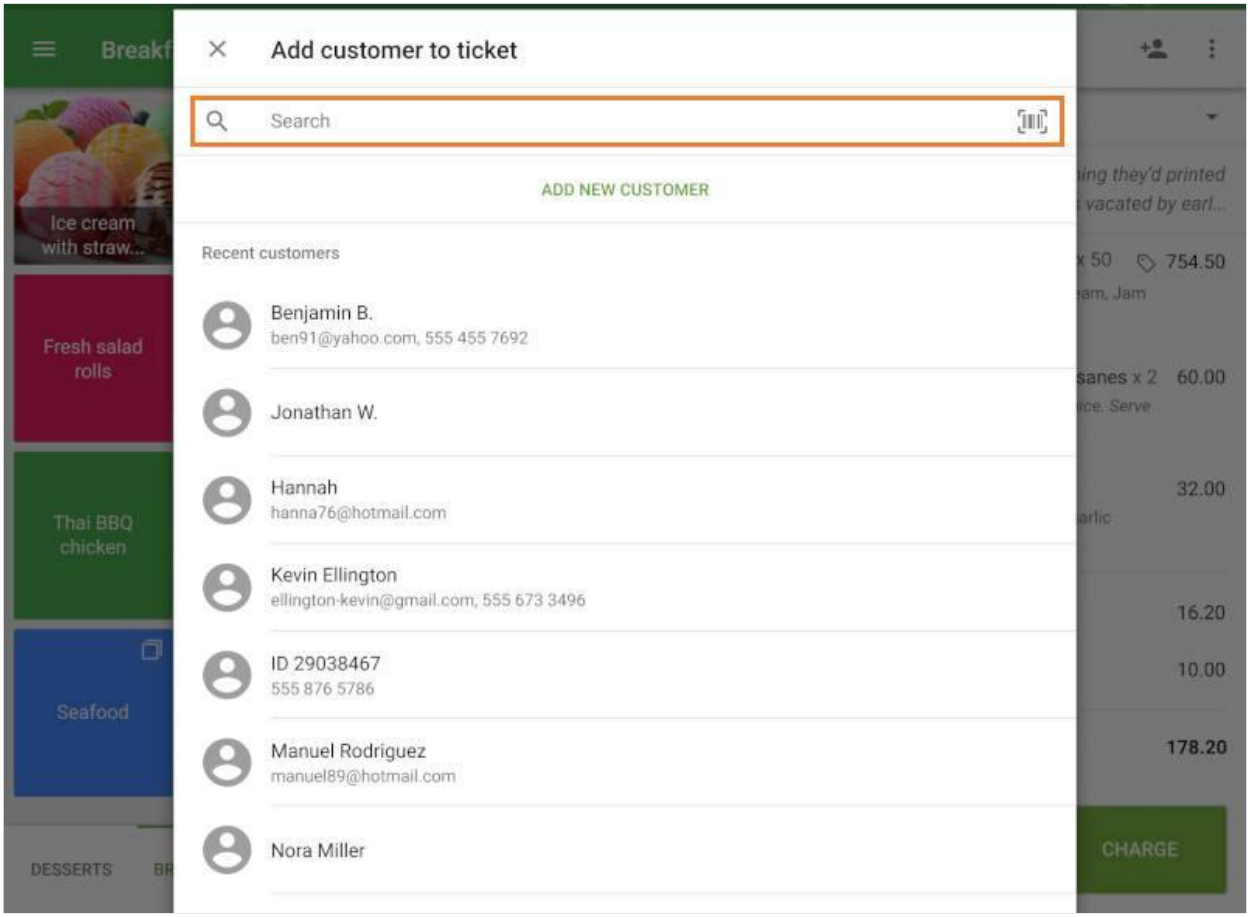
Click **Save**.

3. Add Customer to Receipt by Scanning a Code

Once the customer codes are saved in their profiles, you can identify customers during a sale:

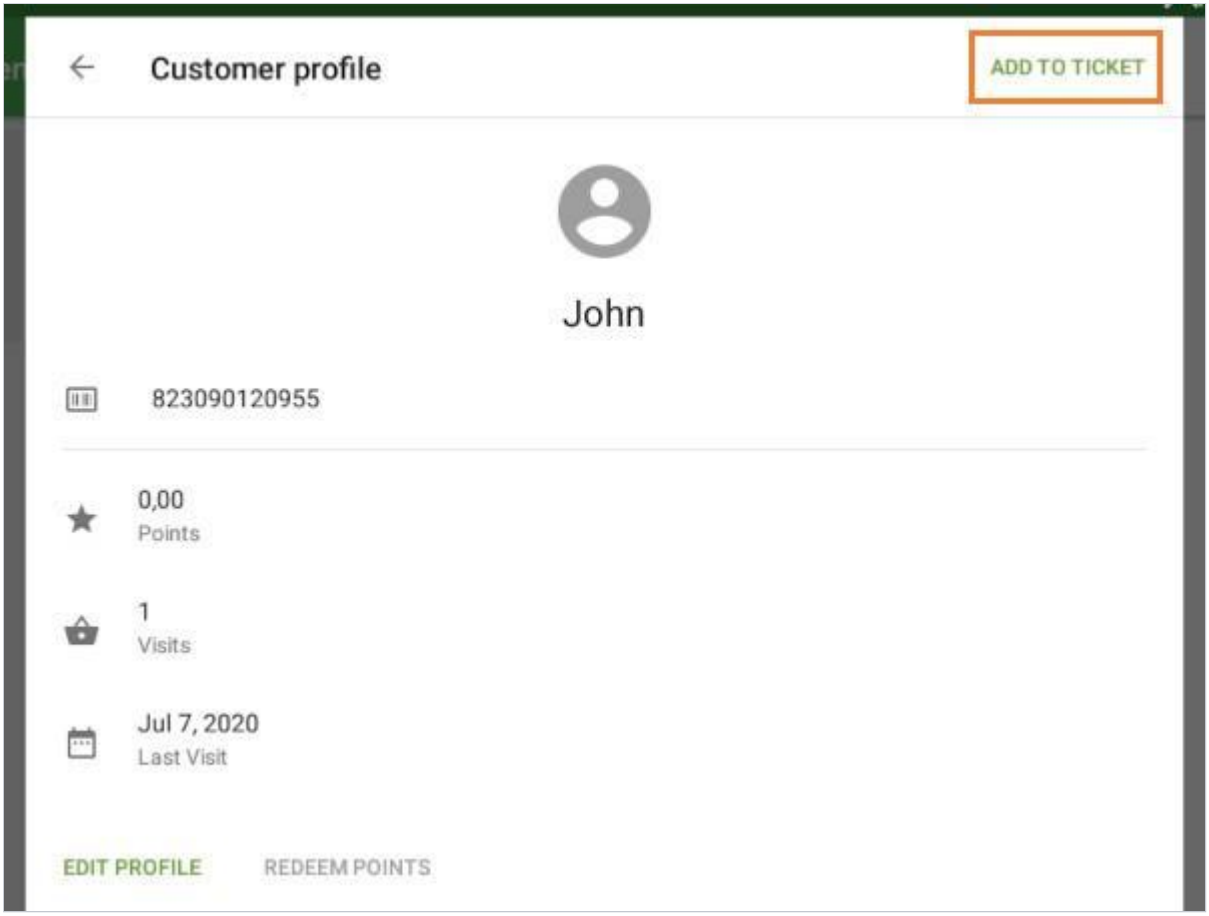
At the sale ‘Add customer to the ticket’ screen, scan the barcode from the customer’s card using:

- A barcode scanner, or
- The built-in camera (if enabled in settings).



If the scanned value matches a customer code:

- The customer's profile will open.
- Tap '**Add to ticket**' to link the customer to the sale.



If no match is found:

- A message will appear: "**Customer not found**."

4. Find Receipts by Customer Code

You can also use the customer code to search receipts:

- Go to the '**Receipts**' menu at the POS.
- Use the customer code in the search bar to view all sales linked to that customer.

This method is especially useful for loyalty programs, ensuring customers receive points and benefits automatically.

See also:

How to Sign Up a Customer in Loyverse POS

How to Work with Customer Base in the Back office

Customer Identification by Phone Number



Video
https://www.youtube.com/watch?v=cpeZnJ_hILk

Loyverse POS allows you to identify and add customers to a sale using their phone number. This is especially helpful when names are not unique or when you want to quickly find a customer during checkout.

1. Why Use Phone Numbers for Customer Identification

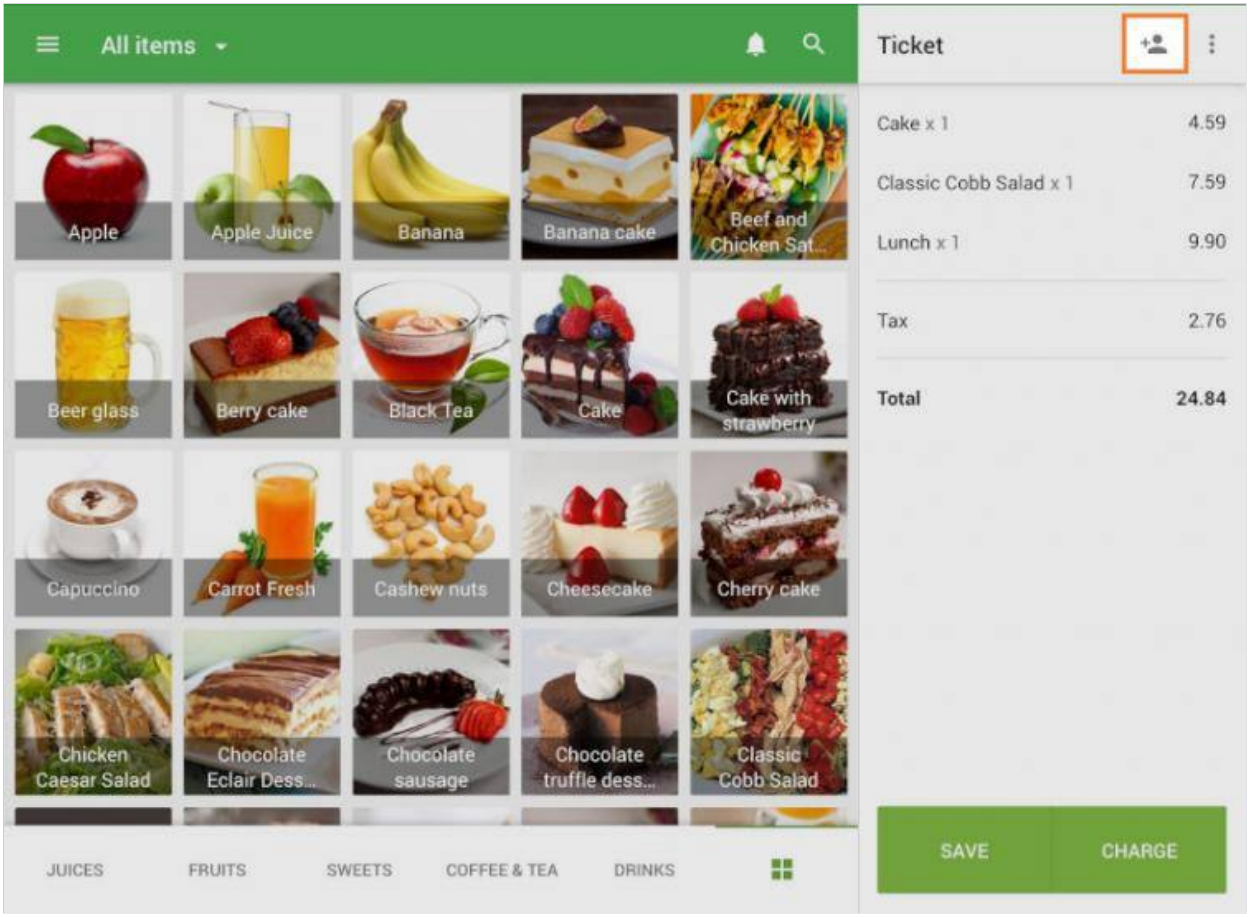
When registering a customer, Loyverse allows filling in any of the following: **Name**, **Phone**, or **Email**. However:

- Customer names are often not unique.
- Phone numbers and emails are more likely to be unique identifiers.

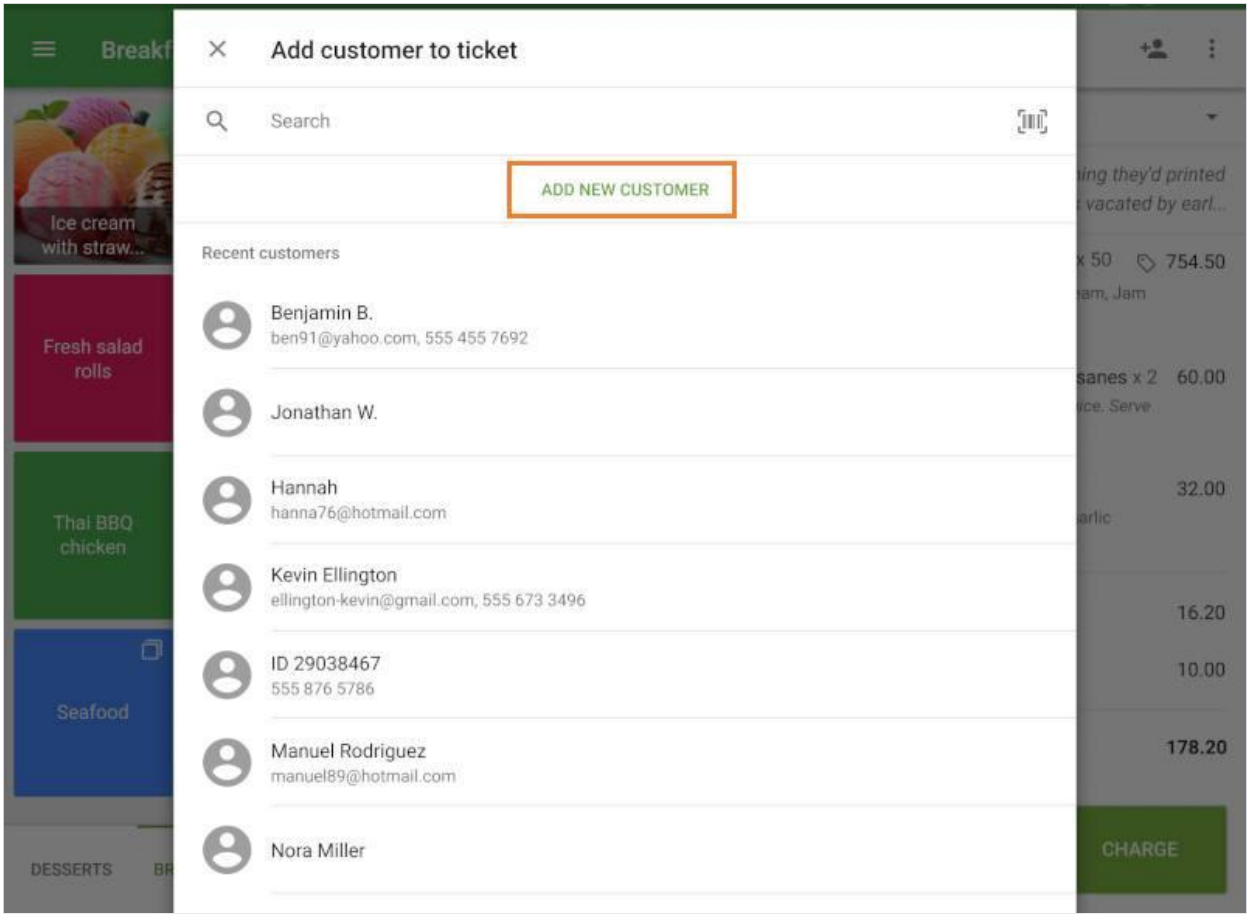
Tip: For best results and easier customer lookup, always add a **phone number** or **email** to the customer's profile.

2. Adding a Phone Number When Registering a New Customer

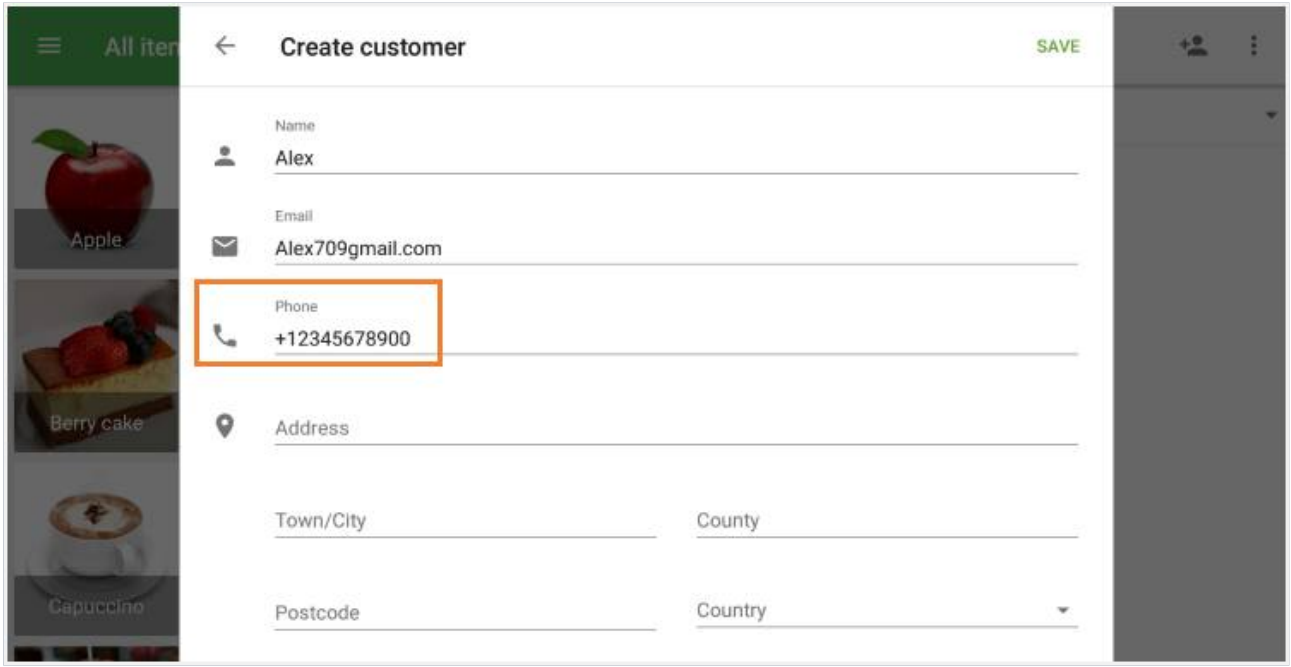
Tap the '**Add client**' icon at the top right of the sale screen.



Tap '**Add new customer**'.



Fill in the '**Phone**' field along with any other information you want to include (name, email, etc.).



Tap '**Save**'.

3. Adding a Phone Number to Existing Customers

If you already have a customer saved without a phone number:

1. Go to the **Customers** list in POS or Back Office.
2. Find and open the customer's profile.
3. Tap **'Edit profile'**.
4. Enter the phone number and **Save** the changes.

4. Identifying a Customer by Phone Number During a Sale

1. At the sale screen, tap the '**Add client**' icon.
2. In the **Search** bar, start typing the customer's phone number.
3. Select the matching customer from the list.
4. Tap '**Add to ticket**' to link the customer to the receipt.

This ensures:

- The customer receives loyalty points (if the program is active).
- Sales are properly recorded in their profile for future reference.

Using phone numbers helps streamline your customer service and ensures the right person is always linked to the sale.

See also:

How to Sign Up a Customer in Loyverse POS

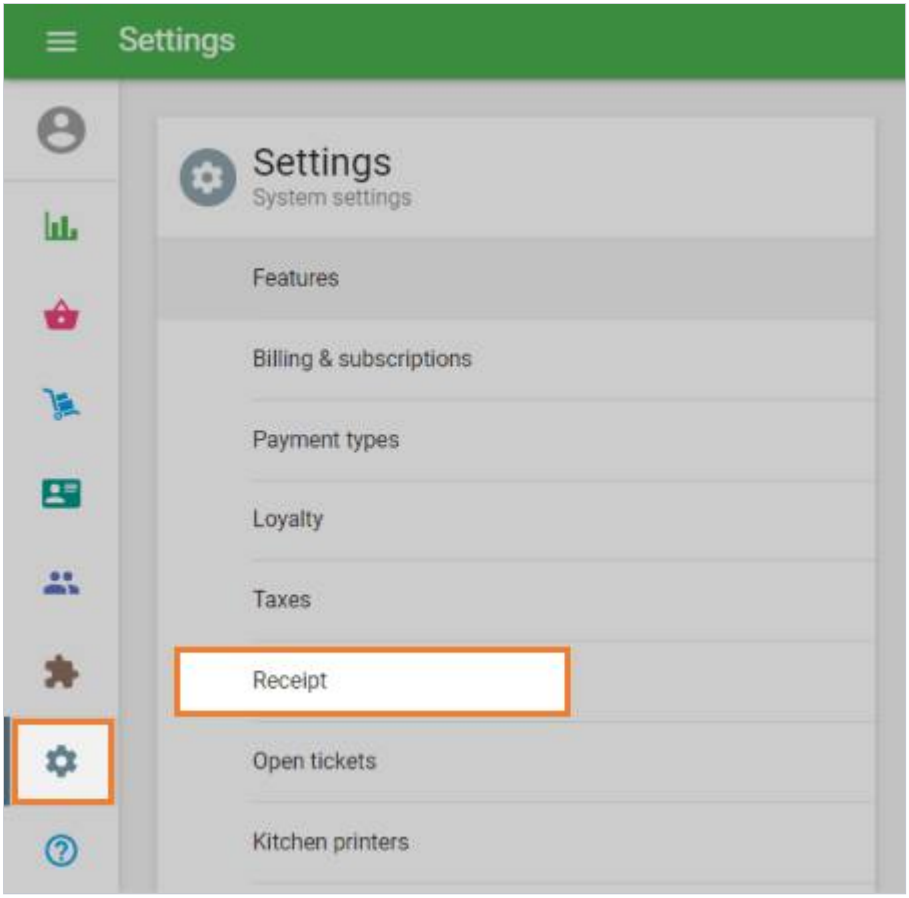
Information about the Customer and Comments in the Receipt

You can configure whether customer information and comments appear on **client-facing receipts**, such as printed or emailed receipts. These settings **do not affect** internal receipts stored in the POS or Back Office, where all customer data and comments are always visible.

Setting Up in the Back Office

Log in to the **Back Office** and go to the '**Settings**' menu.

Select the '**Receipt**' section.



You will see two relevant options:

- **Show customer info**: Enable this to display the customer's name, phone number, and address (if filled in) on printed and email receipts.
- **Show comments:** Enable this to include both ticket comments and individual item comments on receipts.

Don't forget to click '**Save**' after making changes.

Multi-Store Consideration

If you manage multiple stores, these settings must be configured **separately for each store**:

- Use the **store selector** at the top of the Receipt settings page.
- Repeat the configuration and **save changes** for each store.

Adding Customer Information During Sale

To display customer details on the receipt:

- Tap the '**Add client**' icon during a sale.
- Select or create a customer. The receipt will then include their **name, phone number**, and **address** (if available).

Adding Comments

You can add comments to both tickets and individual items:

To add a ticket comment:

1. Tap the **menu (⋮)** on the ticket header.
2. Select '**Edit ticket**'.
3. Type your comment in the popup window and tap '**Save**'.

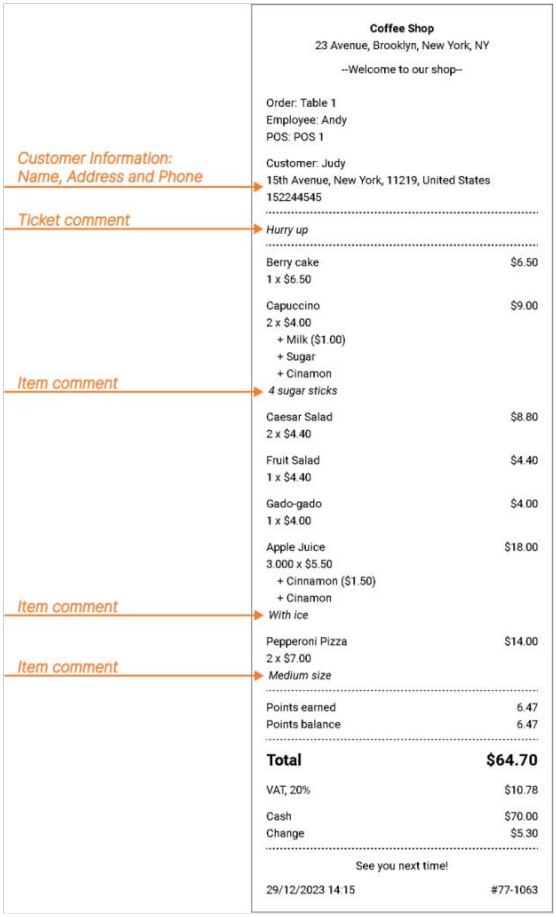
To add an item comment:

1. Tap the item in the ticket.
2. Enter the note in the '**Comment**' field in the popup.
3. Tap '**Save**'.

What Will Appear on the Customer's Receipt

If enabled in settings, the following will be printed or emailed on the customer's receipt:

- Customer **name, address, phone number**
- Ticket-level **comment**
- Item **comments**



Note: All these details also appear on the **refund receipt**, if a refund is processed for the transaction.

See also:

How to Sign Up a Customer in Loyverse POS

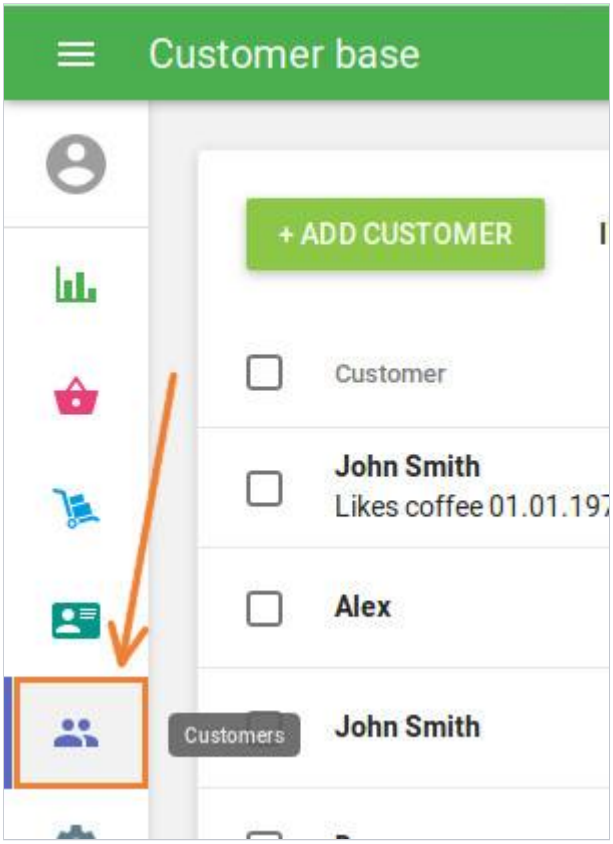
How to Work with Customer Base in the Back office

Video
https://www.youtube.com/watch?v=T6MHkk4cZrU

Managing your customer base in Loyverse Back Office helps you maintain accurate records, apply loyalty rewards, and better serve returning clients.

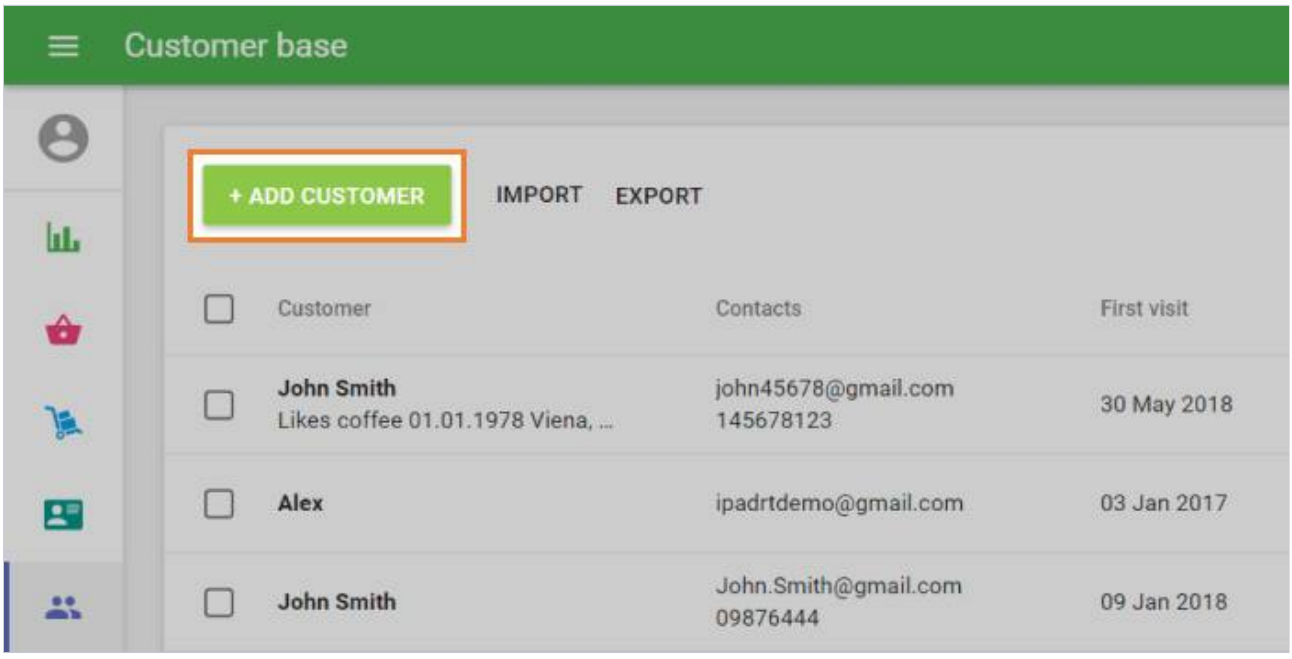
1. Accessing the Customer Base

Log in to the **Back Office**, and from the left-hand menu, go to '**Customers**' to open your Customer base.

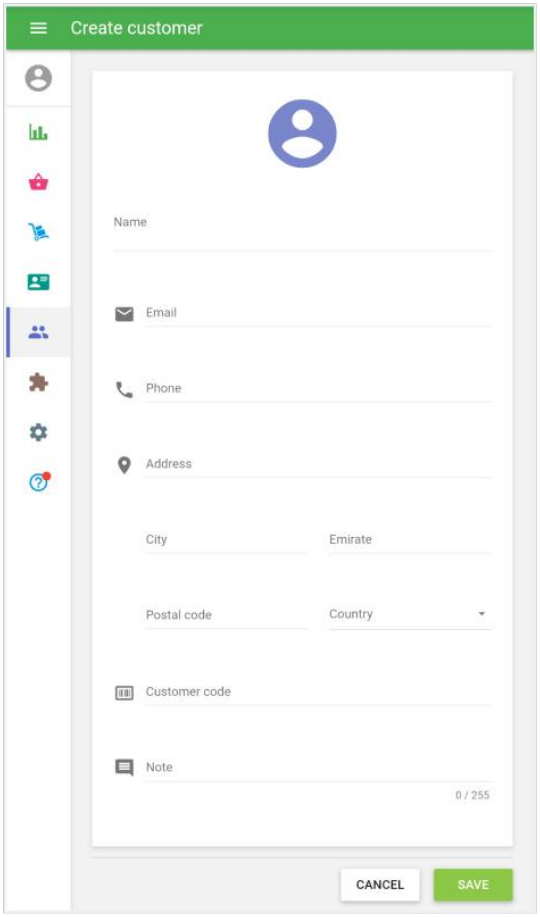


2. Creating a New Customer

Click the '+ **Add customer**' button.

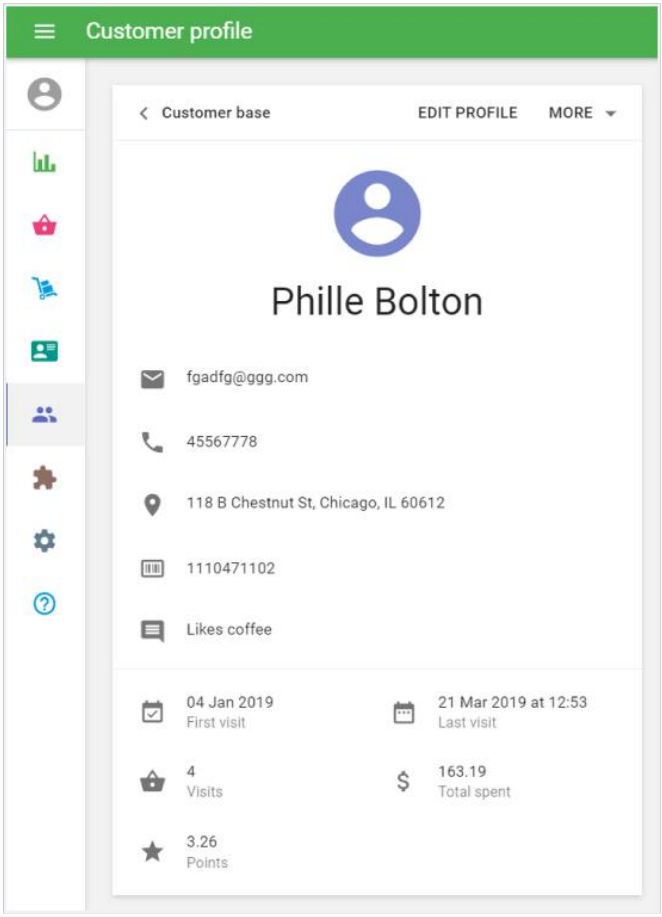


The '**Create customer**' form will open.



Fill in the required **Name** field. Other fields such as **Phone**, **Email**, **Customer code**, **Address**, and **Note** are optional.

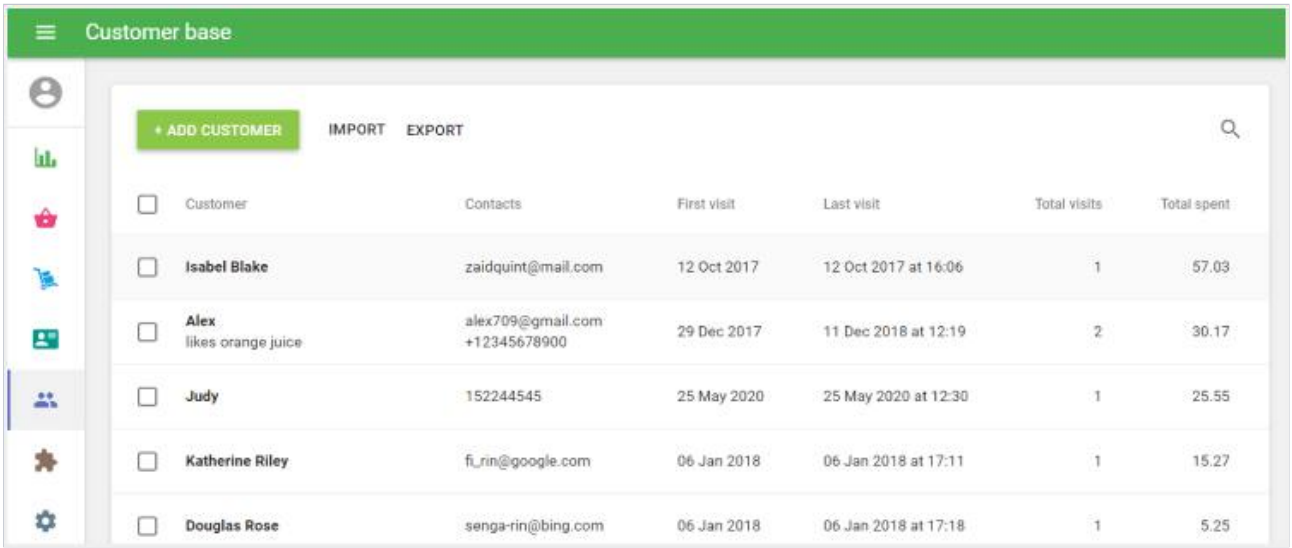
Click '**Save**' to create the customer profile.



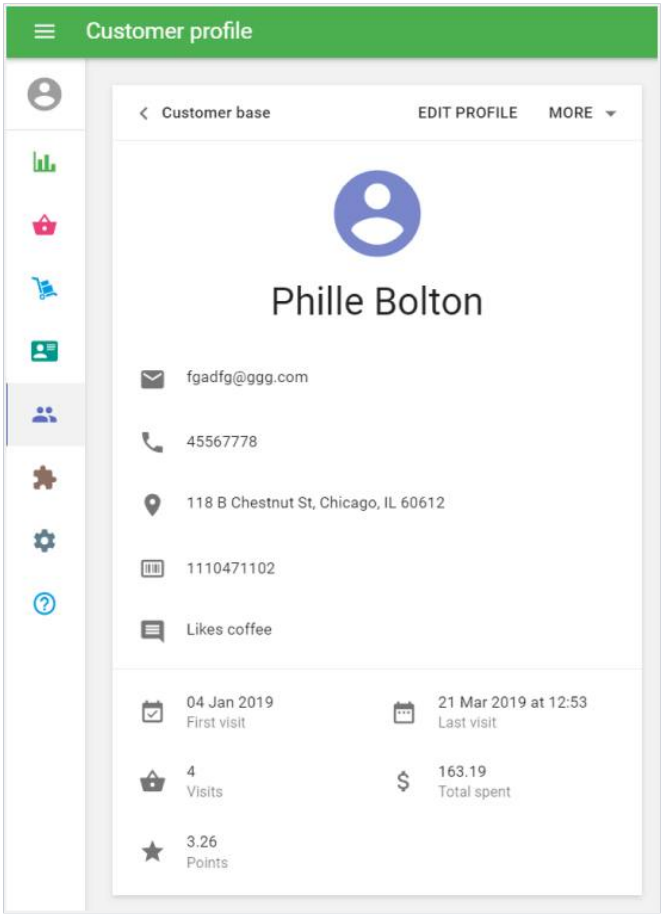
Tip: Including a phone number or email helps with accurate customer identification and enables receipt delivery via email.

3. Editing an Existing Customer

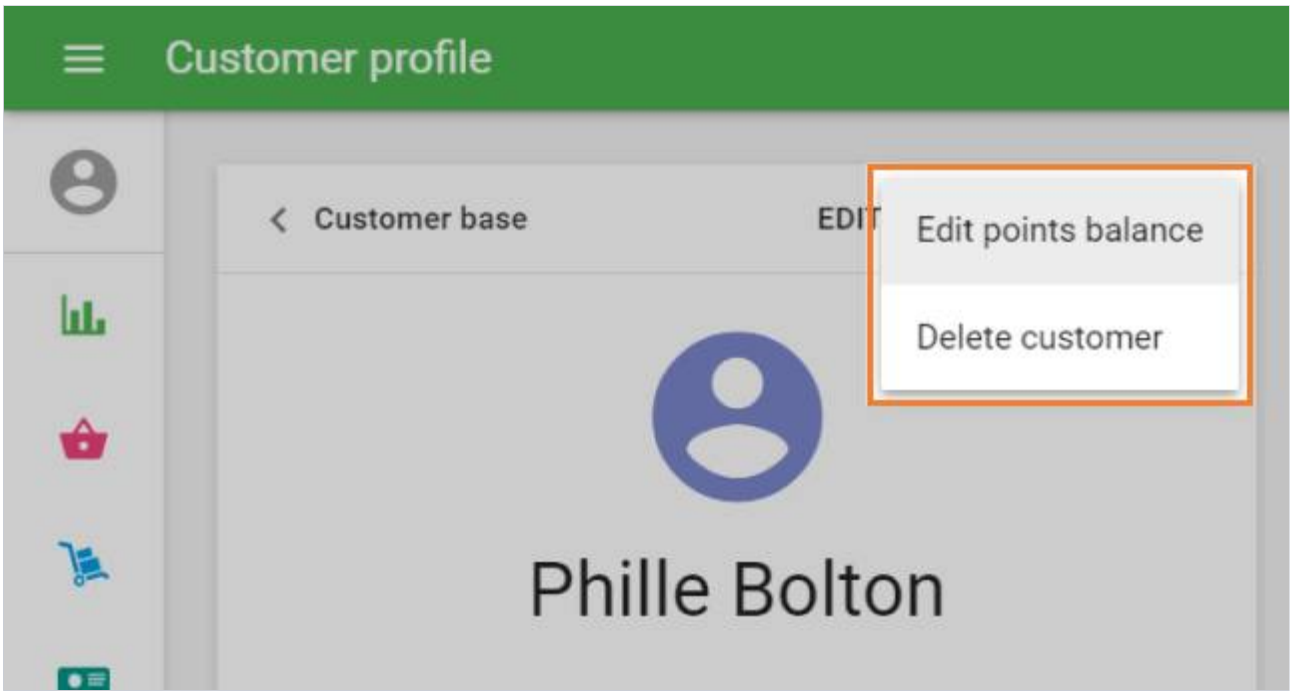
Click on the customer's name from the list to open their profile.



Click '**Edit profile**' to update fields like Name, Phone number, Address, and Notes.



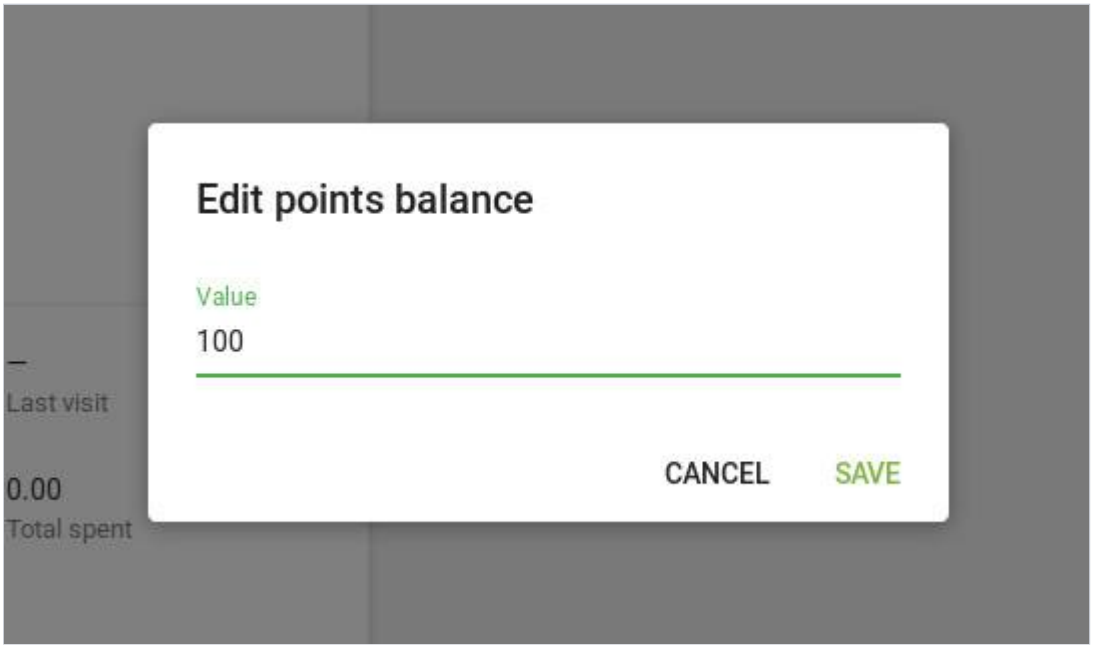
Use the '**More**' menu to:



- Edit points balance
- Delete customer

4. Adjusting Loyalty Points

- From the customer's profile, select '**Edit points balance**' in the '**More**' menu.
- Enter the new points balance in the pop-up form and click '**Adjust**' to save.



This feature allows you to correct or reward customer points manually.

Keeping your customer base well-organized enables smoother sales operations and builds stronger customer relationships.

See also:

How to Delete Customers from the Base

Importing and Exporting Customers

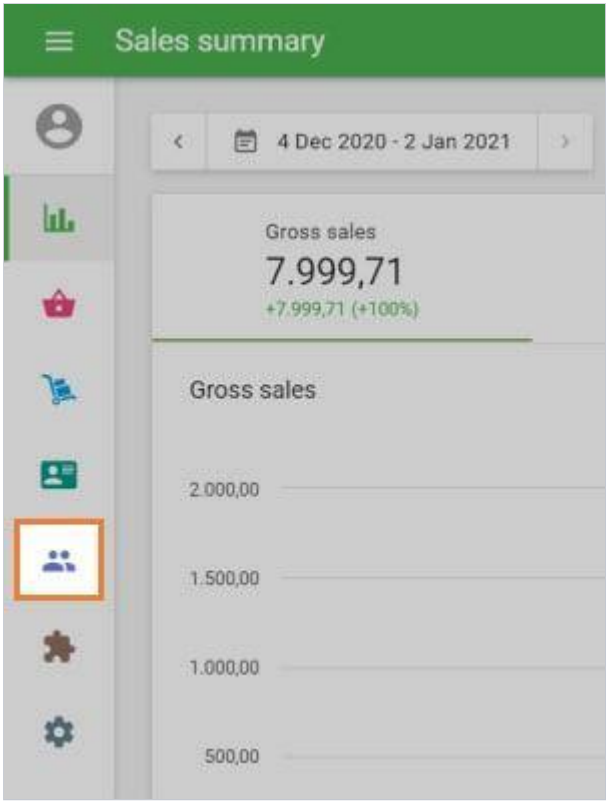
How to Sign Up a Customer in Loyverse POS

Importing and Exporting Customers

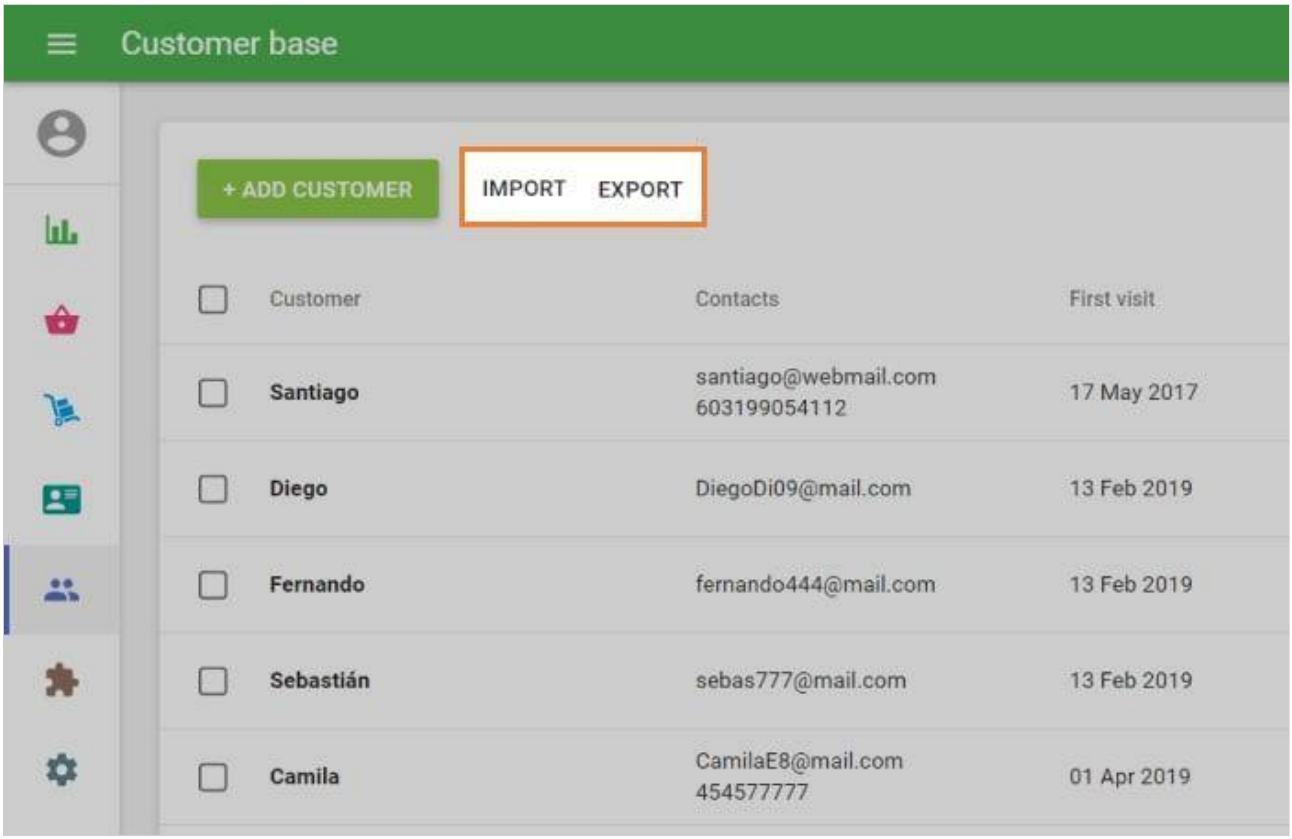
In the Loyverse POS app, you can manually add and edit customer profiles. However, if you need to add or update a large number of customers, the **import and export functions in the Back Office** make the process faster and more convenient.

Exporting Customers

Open the **Back Office** and go to the **Customers** menu.



Click the **Export** button at the top of the customer list.



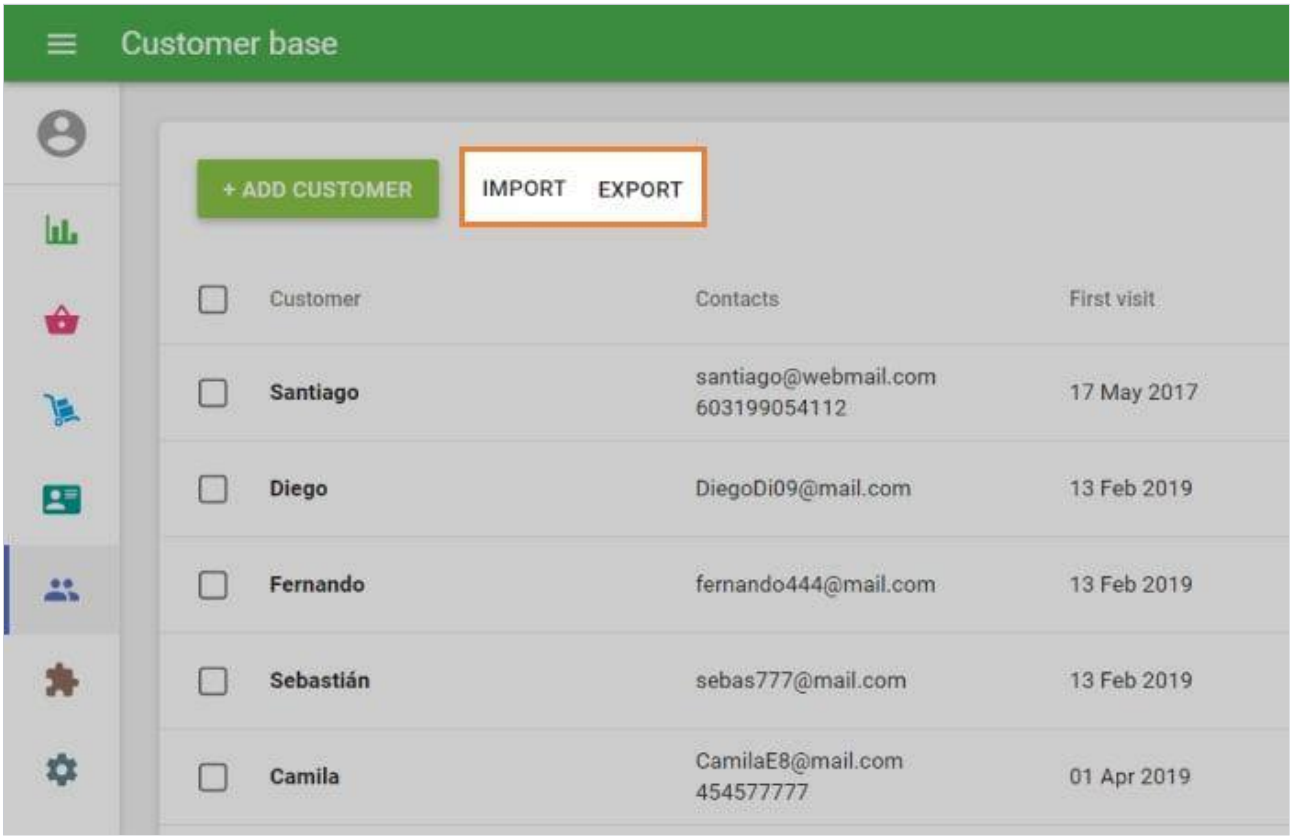
Confirm the download dialog and save the file to your computer.

You can now open this file, review or edit your customer list, and later re-import it into the system.

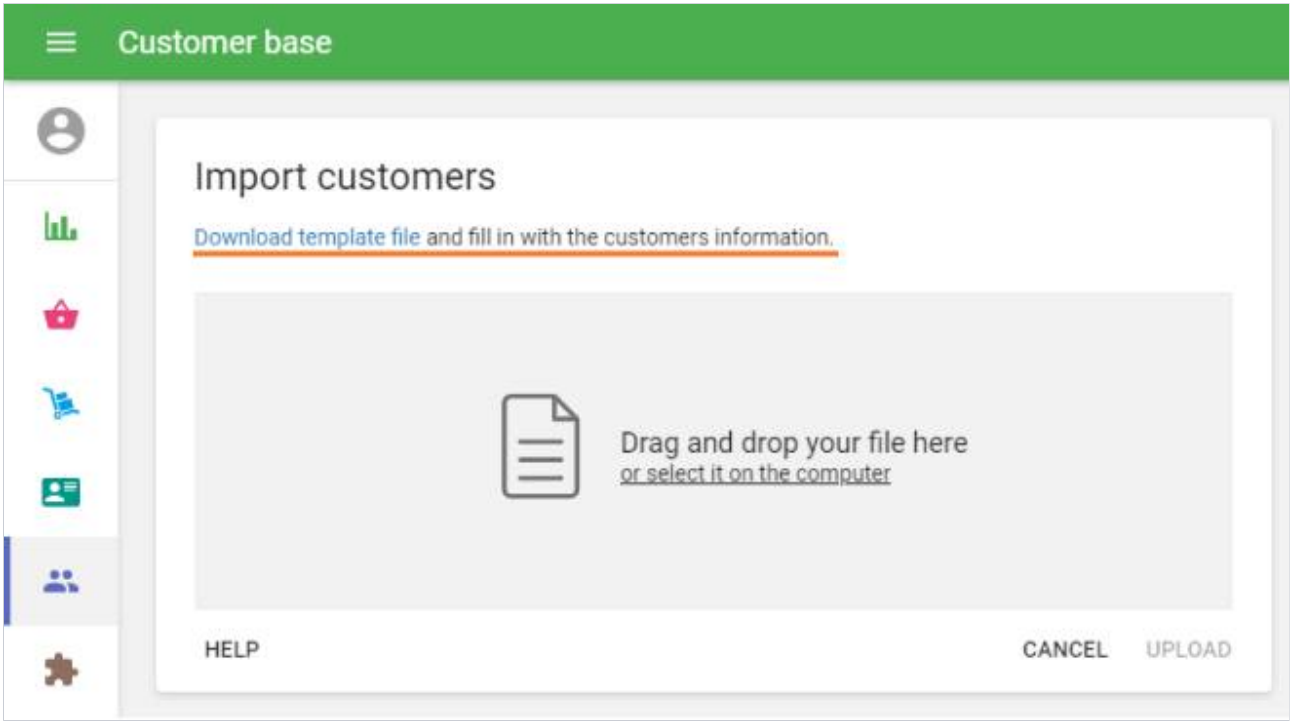
	A	B	C	D	E	F	G
1	Customer ID	Customer name	Email	Phone	Address	City	Province
2	95147502	Santiago	santiago@webmail.com	603199054112	Calle Cabo de Palos, 7 30010 Murcia Spain		
3	2727296151	Diego	DiegoDi09@mail.com				
4	2727274924	Fernando	fernando444@mail.com				
5	2727292518	Sebastián	sebas777@mail.com		Gral. Eulalio Gutiérrez 1258, Zona Centro, 25000 S		
6	2727305703	Camila	CamilaE8@mail.com	454577777			
7	2727312547	Valeria	ValeriaDi5@mail.com				
8	2728093104	Alejandro	alex4517@gmail.com	4517895433			
9	2728168948	Mateo	mate3433@mail.com	6755432888			
10	3980015257	Alex	alex709@gmail.com	+12345678900			
11	2727271176	Alonso	alonso123@gmail.com	548822269669			
12	2727285285	Alicia	Alicia111@mail.com				

Importing Customers

In the **Customers** menu, click the **Import** button.



If you are importing new customers, download the **template file** provided by Loyverse.



Open the file and enter customer details in the specified columns.

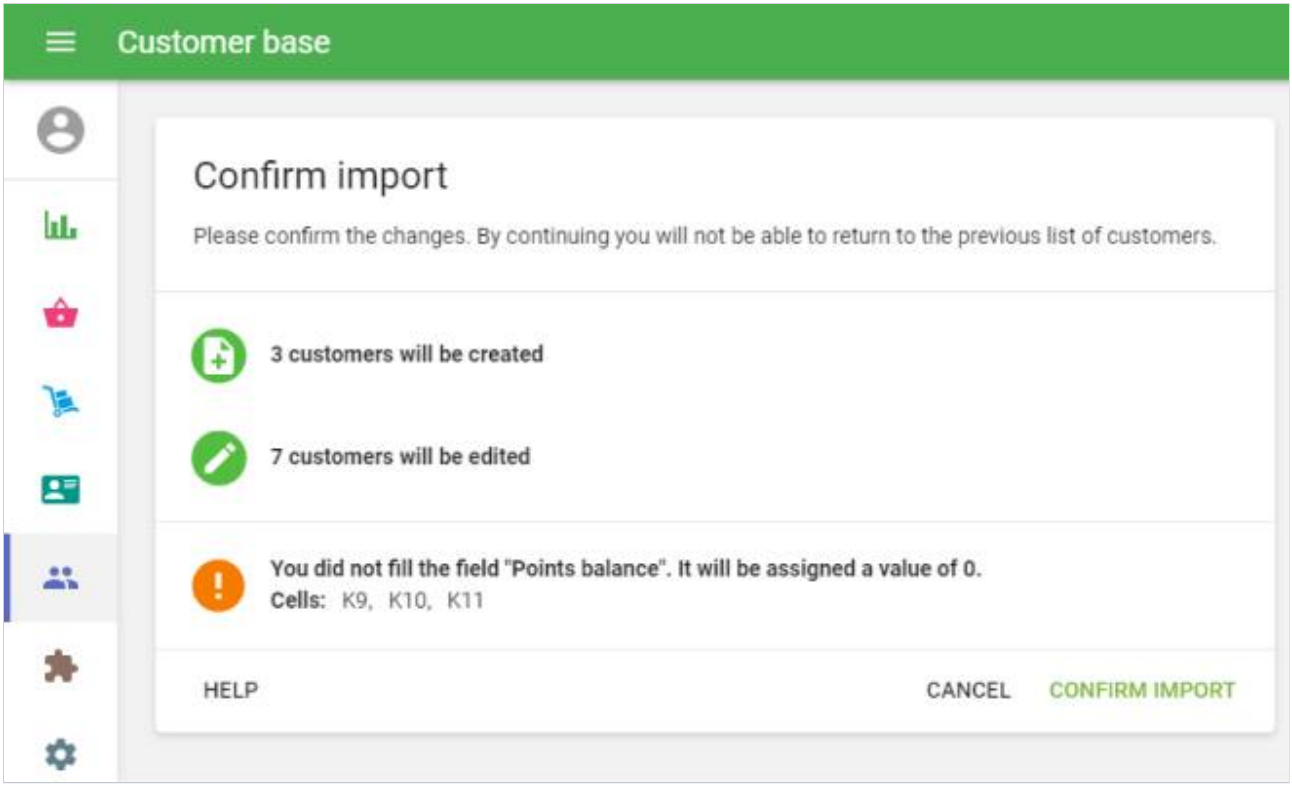
	A	B	C	D	E	F
1	Customer ID	Customer name	Email	Number	Points balance	Note
2		Angels Hicks	courowa_we@toodles.com			
3		Estelles Chapman	elu_redofnd@infoseller.com			
4		Noahs Francis	Malla-fhi@bing.com			
5		Daniels Cunningham	dea_lfayd@google.com			
6		Devins Peterson	mauif_sim@yahoo.com			
7		Adrians Cox	ansftice_buse@yahoo.com			
8						

- If some data is unavailable, you may leave the cell blank.
- Do **not** remove or rearrange the column headers in the first row.

Save the file and return to the **Import customers** window.

- Drag and drop your file into the upload area, or select it manually from your computer.
- Click **Upload** to start the import.

A confirmation window will appear with a summary of the upload and any warnings.



After confirming, your customer base will be updated with the new entries and any modifications to existing customers.

Important Notes

- The **email address** is the main identifier for each customer. Two customers cannot share the same email address.
- If you edit an existing customer's row in the file (keeping the same email), the system will update that customer's information.
- Employees with access rights to manage customers in the Back Office can perform import and export actions.

Using import and export saves time and ensures your customer base is always accurate and up to date.

See also:

How to Work with Customer Base in the Back Office

How to See the Purchase History of Registered Customers

Purchase History of a Registered Customer in the POS

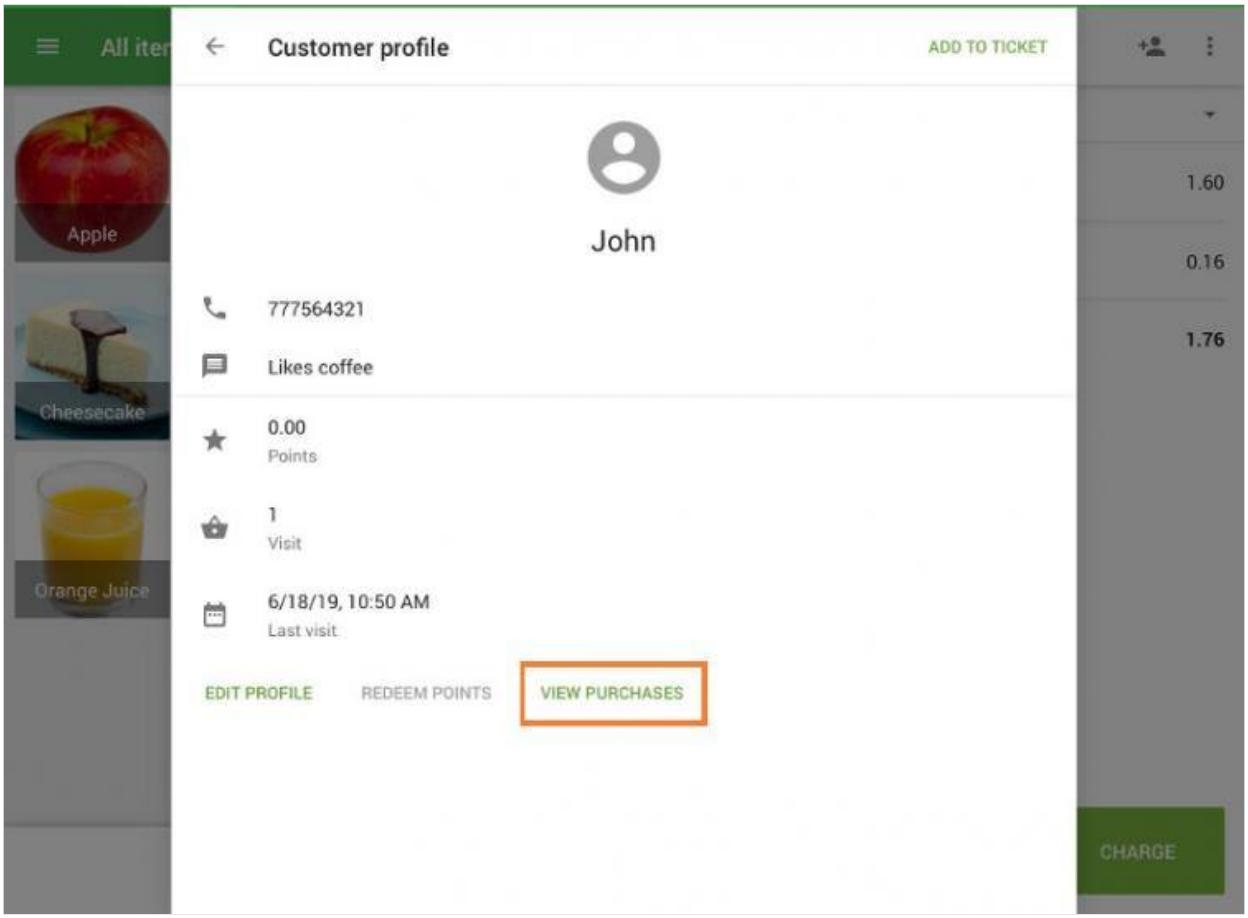
Video
https://www.youtube.com/watch?v=T6MHkk4cZrU

This feature allows you to view the purchase history of a registered customer directly from the Loyverse POS app during a sale. It's helpful for checking past transactions, issuing refunds, reprinting receipts, or emailing them to the customer.

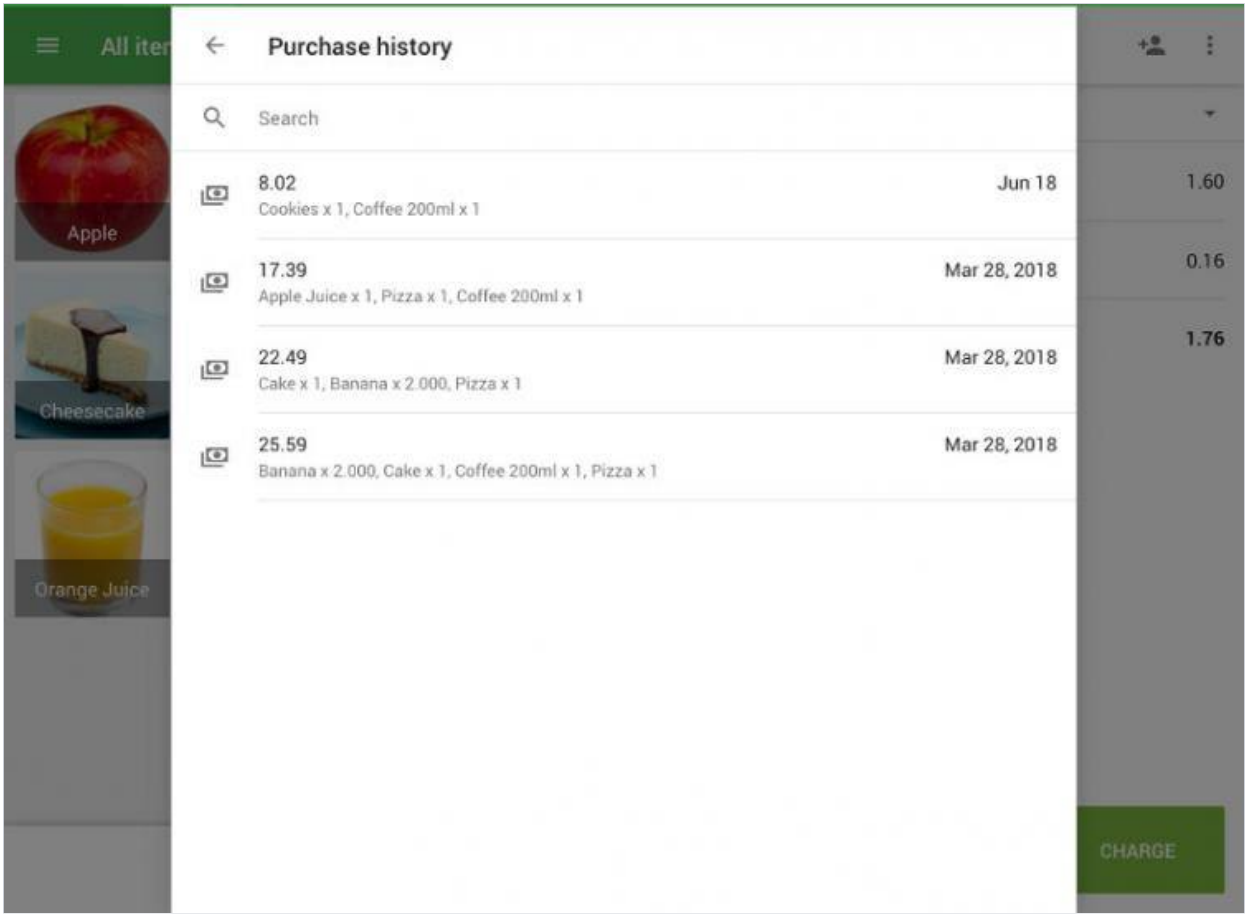
How to View Purchase History

On the **Sales screen** of the Loyverse POS app, add a registered customer to the ticket by tapping the '**Add client**' icon and selecting the customer.

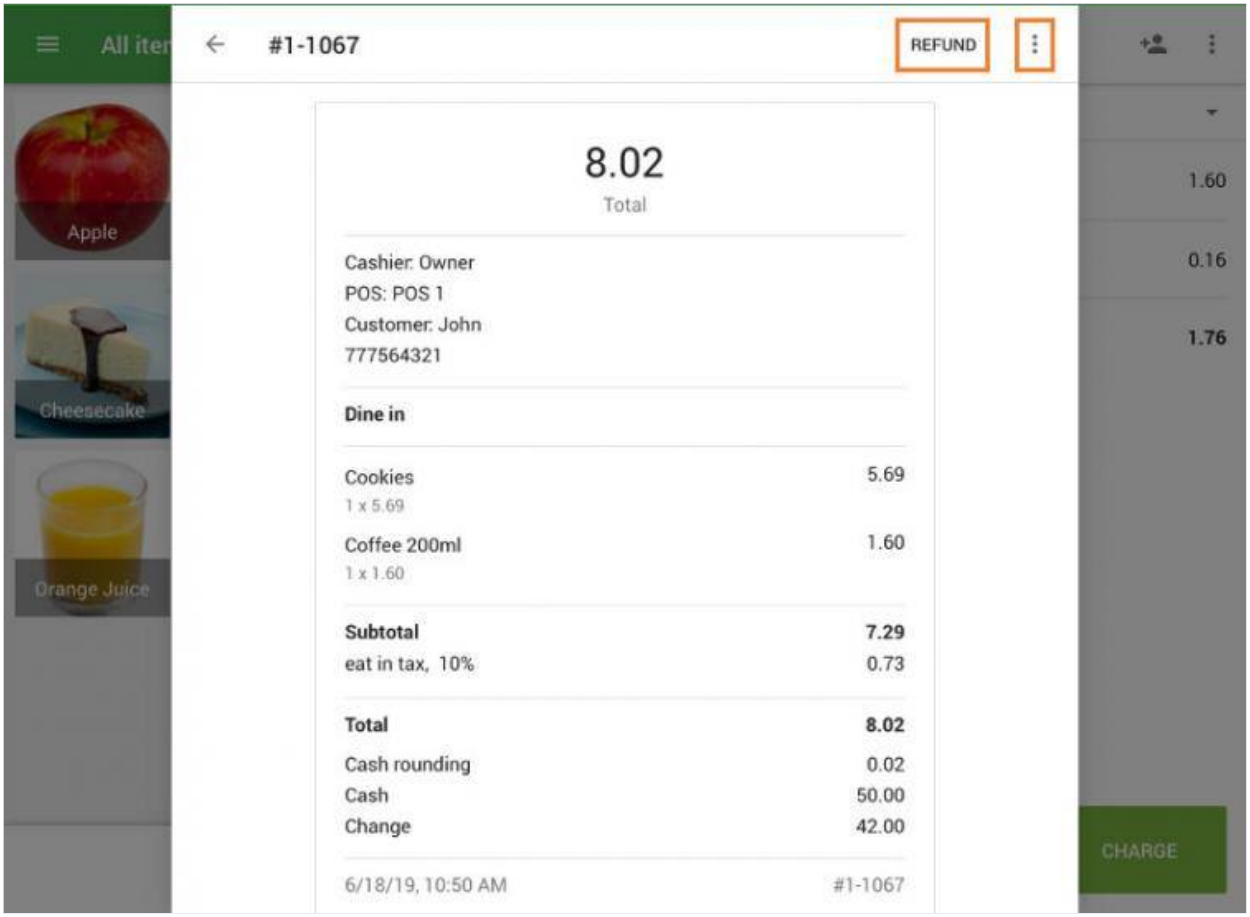
After the customer is added to the ticket, tap the '**View purchases**' button from their profile popup.



You will see a list of previous **receipts issued from the current store**, associated with the customer.



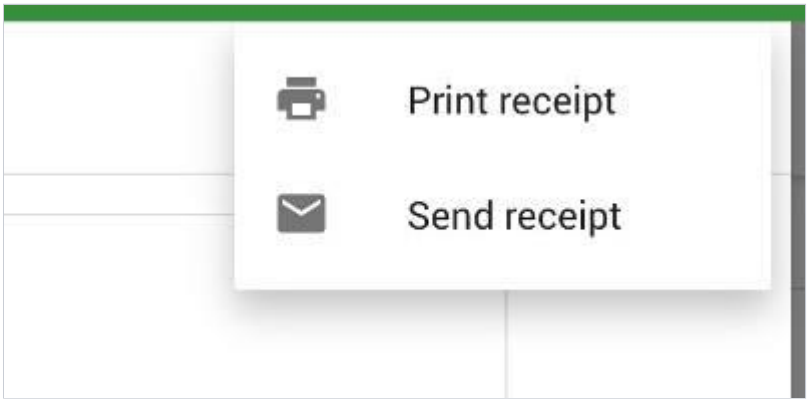
Tap on a receipt to open its details.



Actions You Can Take

Refund: Tap the 'Refund' button to start the return process.

Send receipt: Open the three dots menu (⋮) and choose '**Send receipt**' to email it to the customer.



Print receipt: You can also reprint the receipt if a printer is connected to the POS.

Notes

- The purchase history only displays **receipts from the same store** where the POS is used.

- If the device is **offline**, only receipts that were **previously downloaded to the device** will be accessible in the purchase history.
- The '**View purchases**' button is available only after the customer is added to the ticket.

See also:

How to See the Purchase History of Registered Customers

How to Sign Up a Customer in Loyverse POS

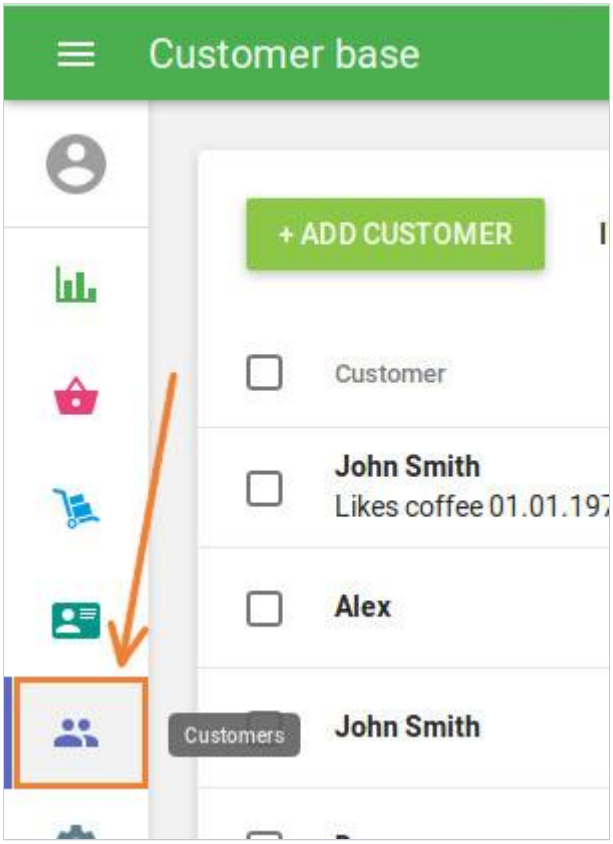
How to See the Purchase History of Registered Customers at the Back Office

Video
https://www.youtube.com/watch?v=T6MHkk4cZrU

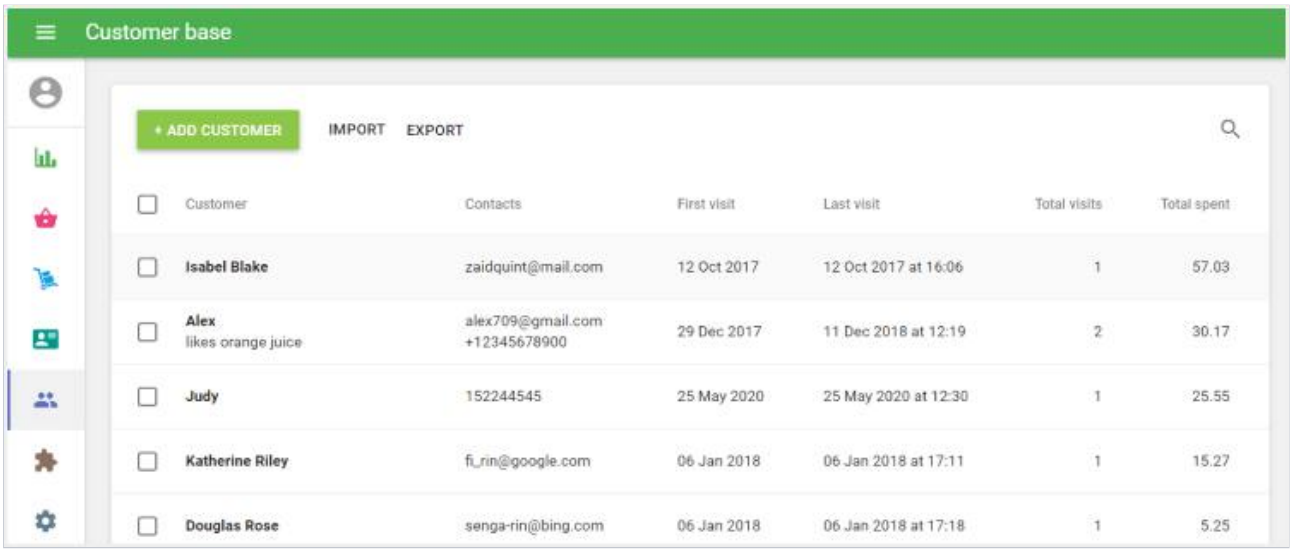
Once you have set up the **customer loyalty program**, which connects sales records to customers, you can view the **purchase history of registered customers** directly in the Back Office.

Viewing Purchase History from the Customer Profile

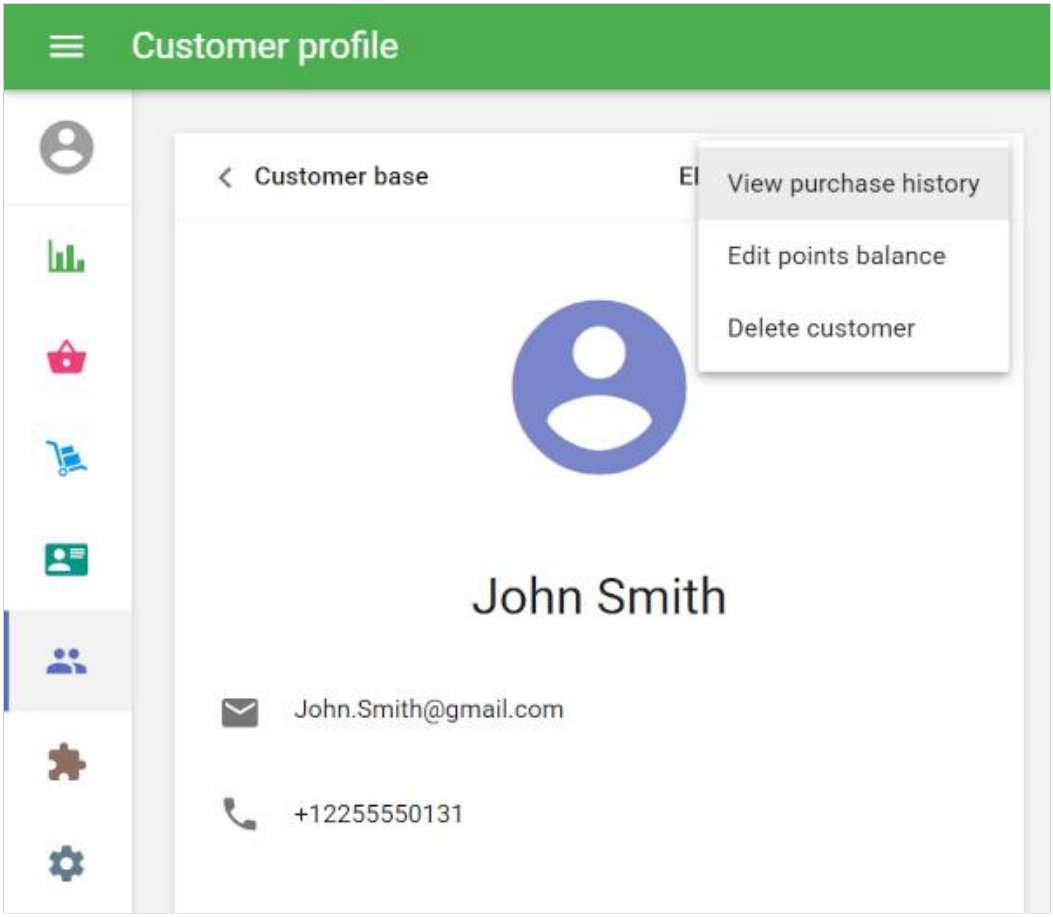
Log in to the **Back Office** and open the **Customer Base**.



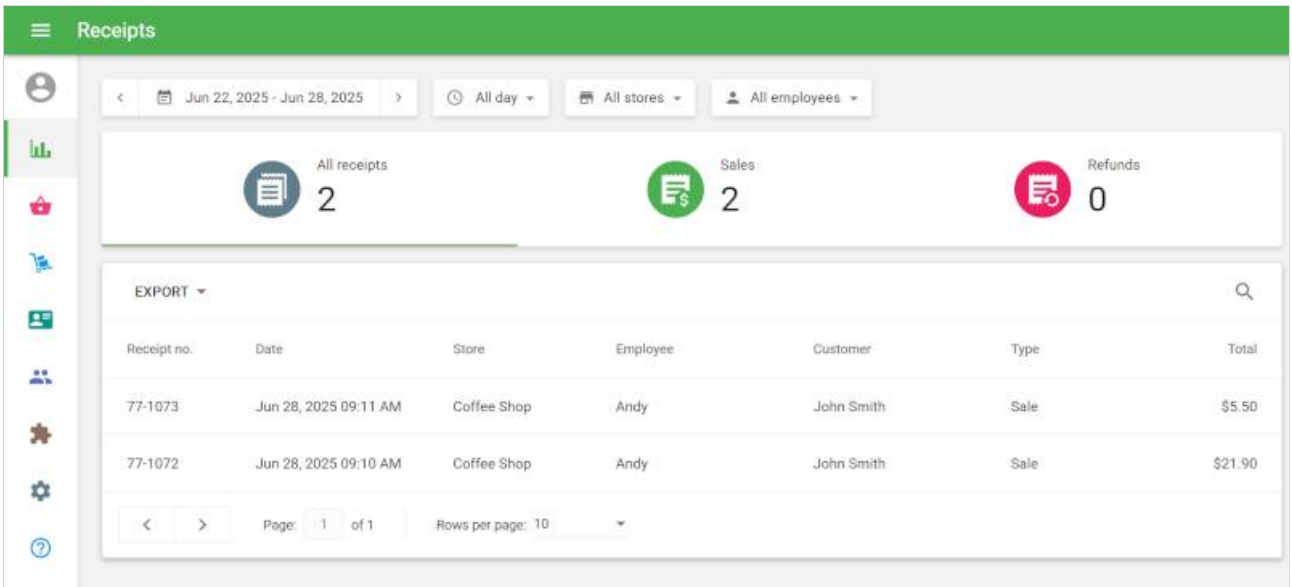
Click on the desired **customer's name** to open their profile. You can search for a customer in the list by name, email, or phone number.



In the profile, click the '**More**' menu and select '**View purchase history**'.



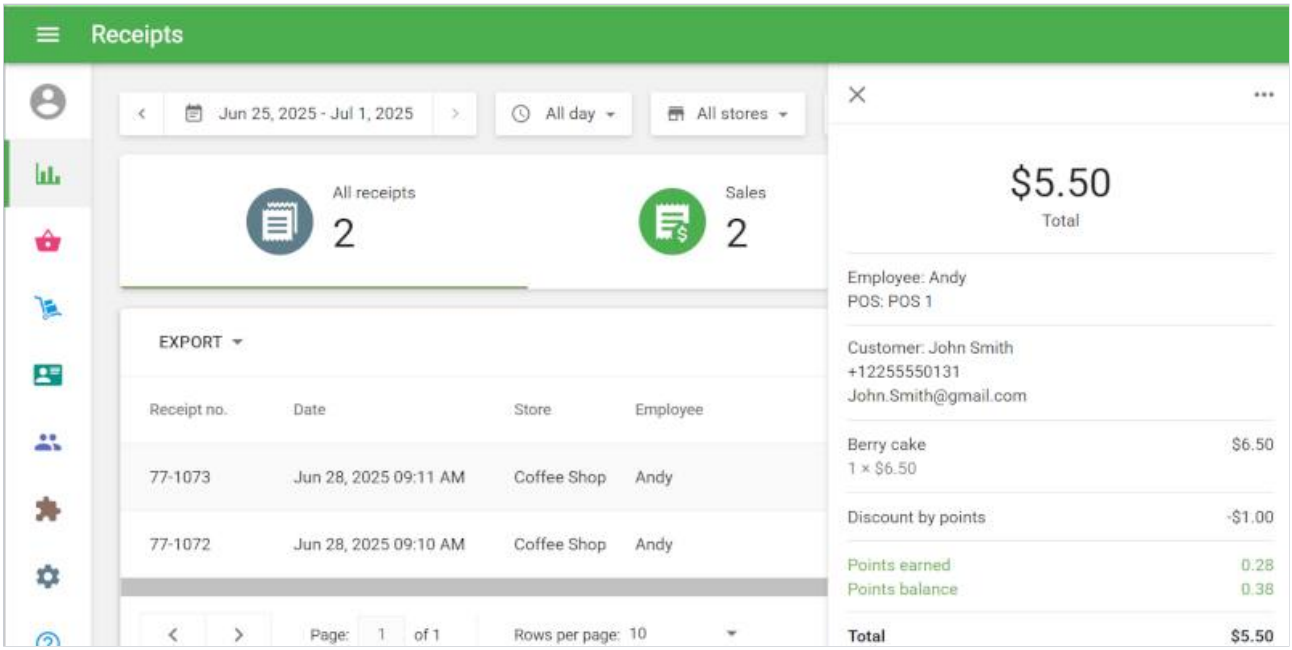
You will see a list of **receipts linked to this customer**.



You can **filter the list** by:

- Date range
- Store (if you have multiple stores)
- Employee

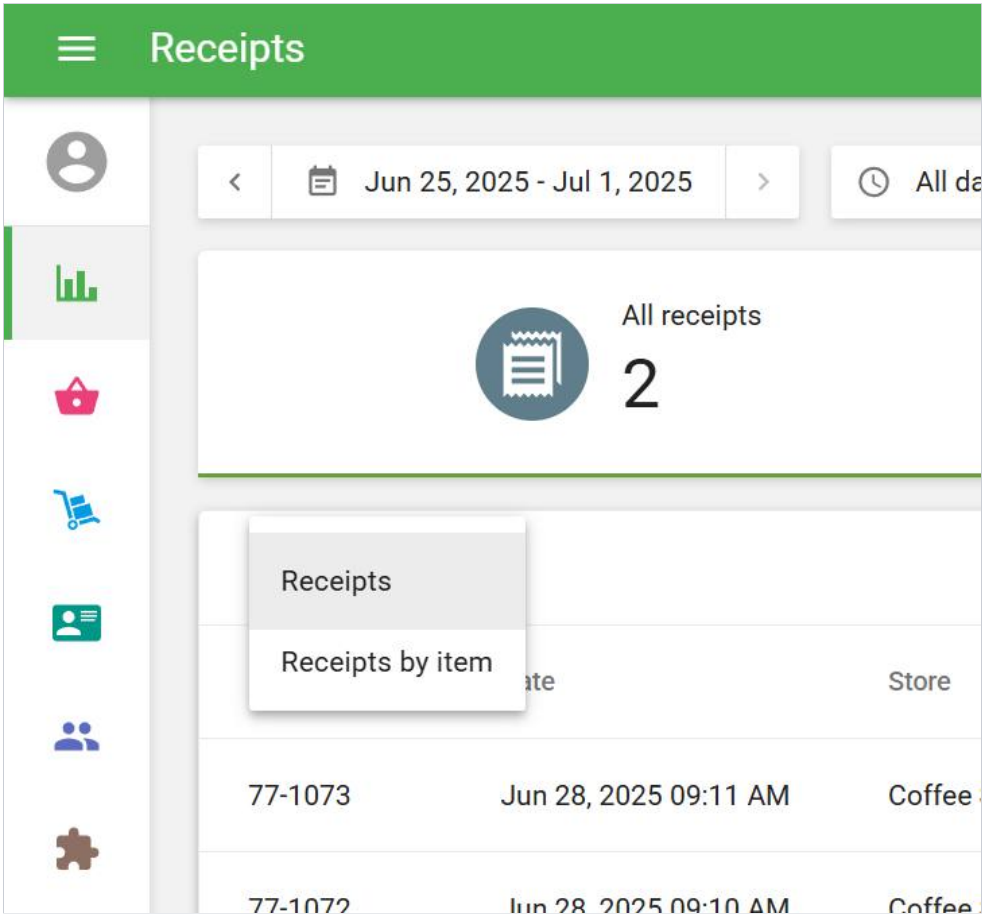
Click on a specific receipt row to view **receipt details** on the right-hand panel.



Exporting Receipts for a Specific Customer

You can export the filtered list of receipts for deeper analysis or record-keeping:

- Click the '**Export**' button.
- Choose either '**Receipts**' or '**Receipts by Item**' for a more detailed breakdown.



- Open the exported file in spreadsheet software like **Excel**, **LibreOffice** or **Google Sheets** to review or analyze the data.

Tip: This feature is especially useful for customer service, loyalty insights, or resolving questions about past purchases.

See also:

Purchase History of a Registered Customer in the POS

How to Open CSV File in Google Sheets

Receipts Section in the Reports in the Back Office

Customer Display System Configuration Guide

Video
https://www.youtube.com/watch?v=eL4xseB5FGA

This guide will show you how to configure Loyverse CDS. To learn more about working with Customer Display System, please read How Loyverse CDS Customer Display Works.

The Loyverse CDS app lets you display itemized order information to your customers on a separate digital display without interrupting the payment flow in the Loyverse POS app.

1. Install Loyverse CDS app

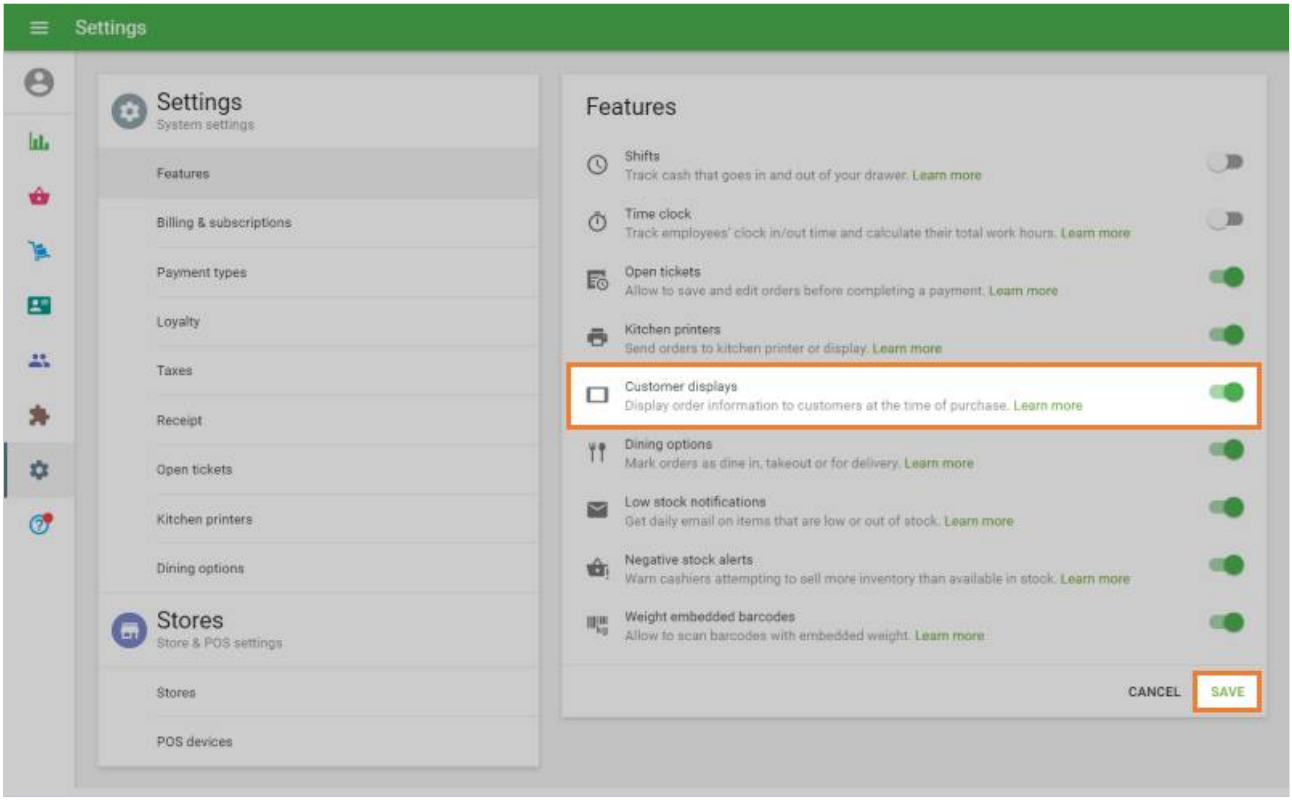
Download the Loyverse CDS for iOS devices (the recommended version of **iOS is 11.0 or higher**) or Android (**5.0 or higher**) devices. Loyverse CDS app should be installed on a separate device from the one with the Loyverse POS app.

Launch the app, and you will see the Loyverse CDS welcome screen. The 'IP Address' and 'Device name' of your device will be displayed, which are the information needed for paring CDS with Loyverse POS.



2. Activate the option for using CDS

Log in to the Back Office, navigate to the Settings menu, Features section, and switch the 'Customer displays' slider on.



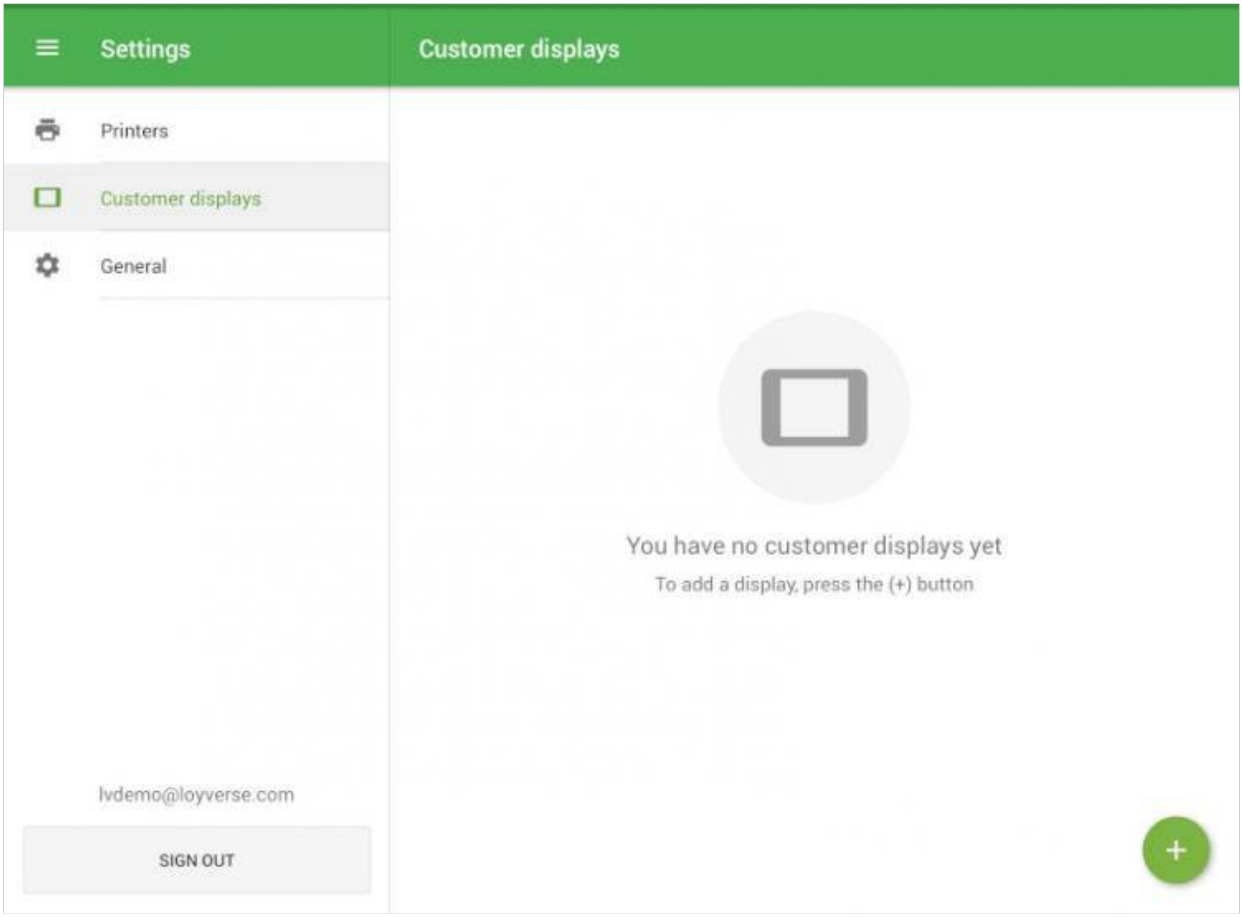
Don’t forget to save the changes.

3. Pair customer display with Loyverse POS

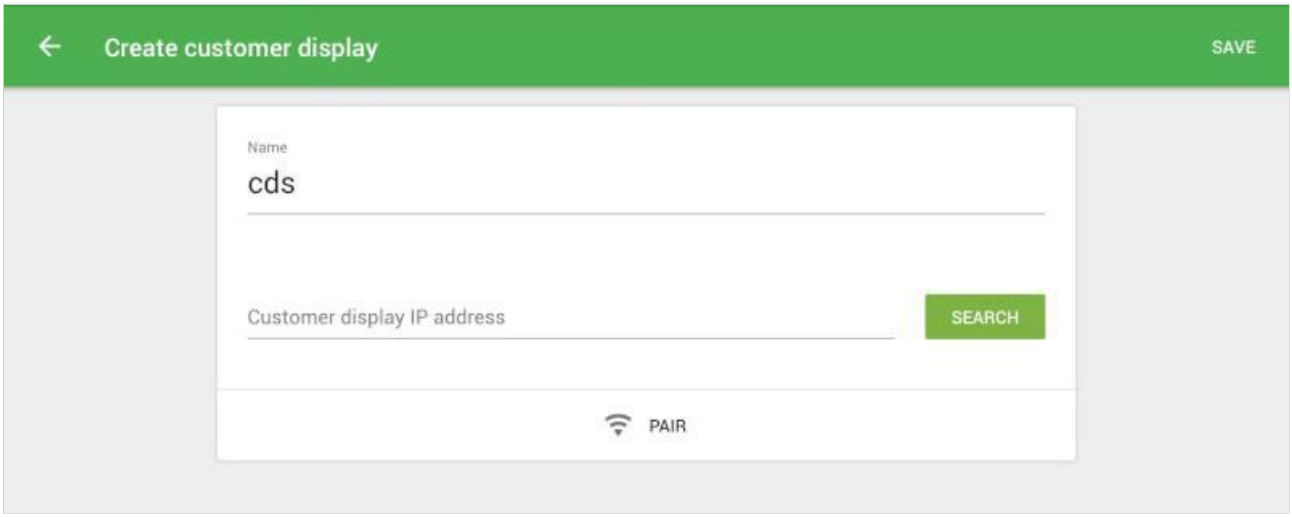
First, make sure that the mobile devices with Loyverse CDS and Loyverse POS are connected to the same Wi-Fi router and the same network.

Then launch Loyverse POS and go to Settings > Customer displays.

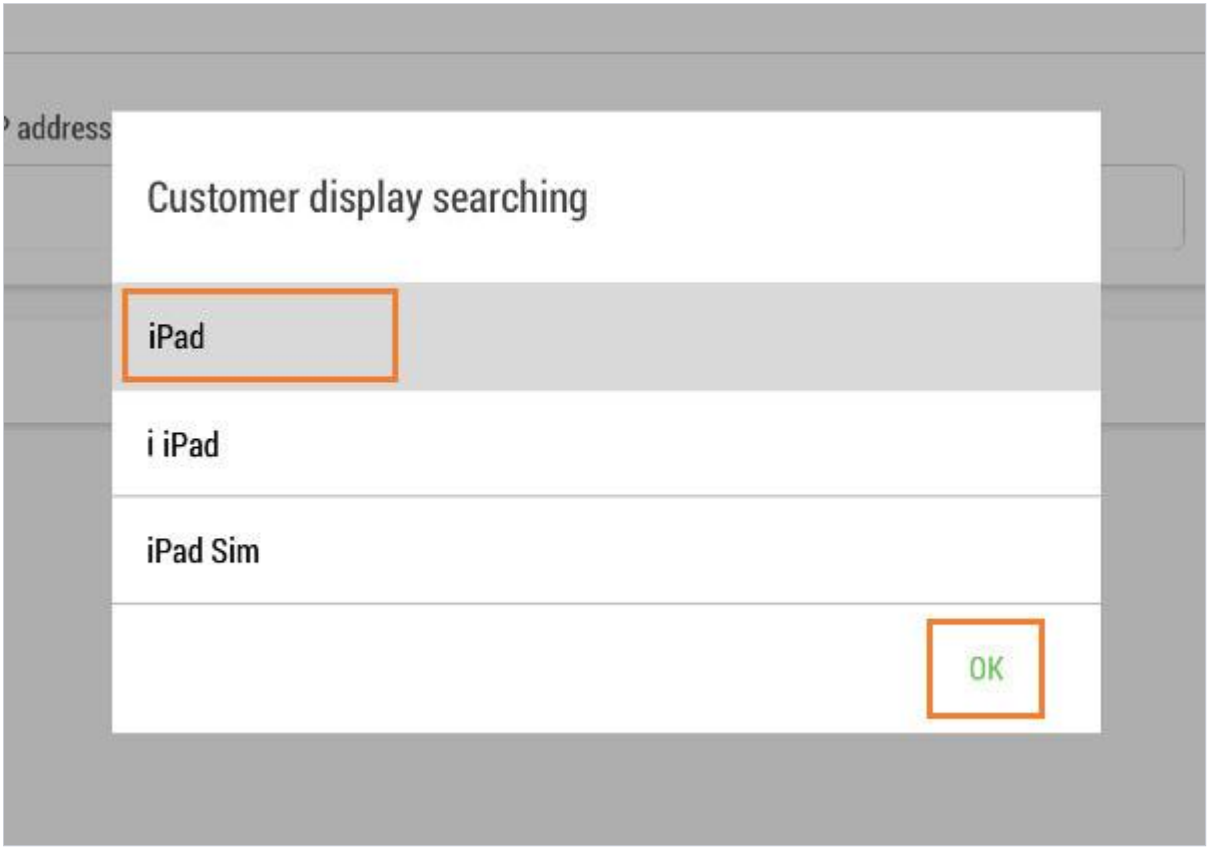
Tap the ‘+’ button to add a customer display.



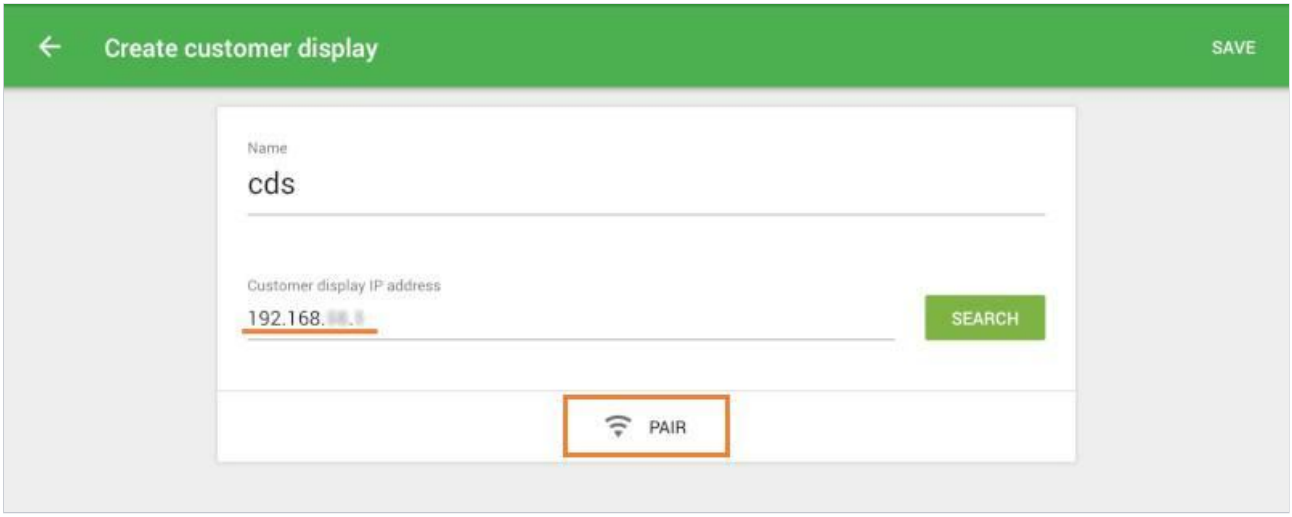
Enter your customer display name into the ‘Name’ field and tap the ‘Search’ button to search the network for available customer display device.



Select the appropriate customer display from the list of discovered devices, and click OK.

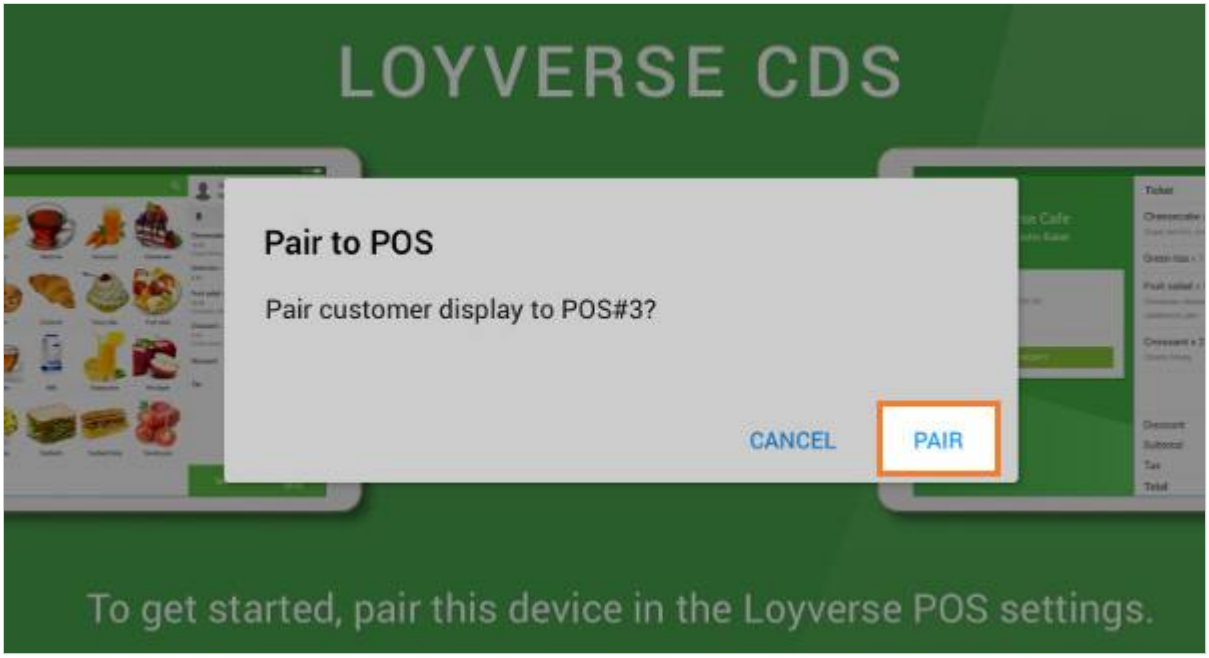


If automatic discovery fails, you can enter the IP address of the customer display device manually. You can take the information about the IP address from the Loyverse CDS welcome screen.



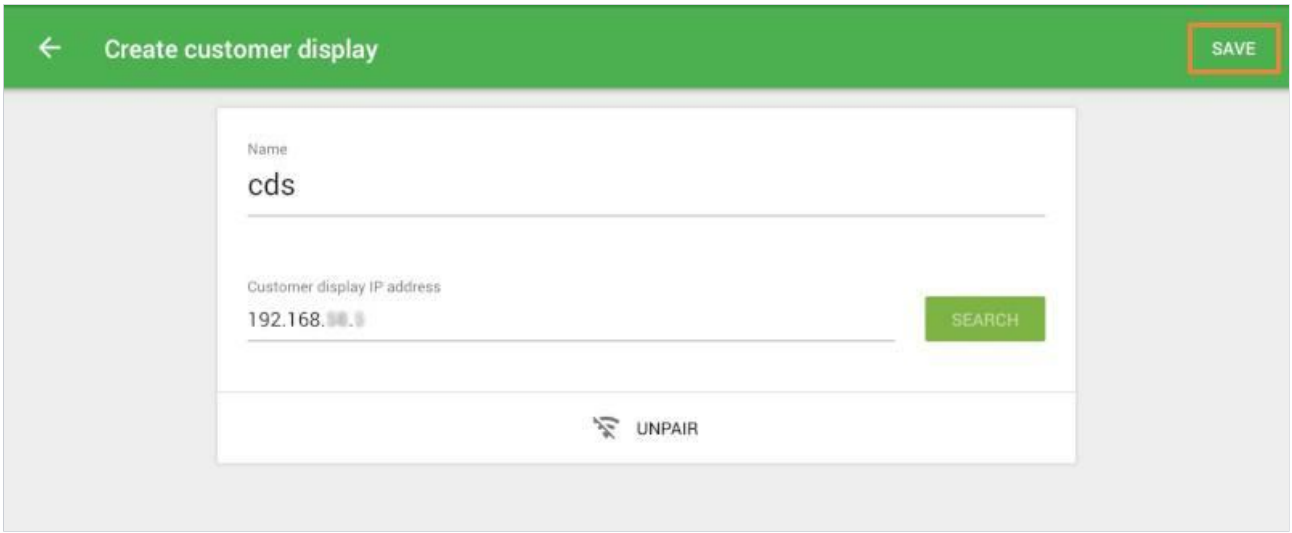
Then tap the ‘Pair’ button.

On the Loyverse CDS tablet, the invitation to pair CDS to POS will appear. Tap ‘Pair’ to confirm the connection.

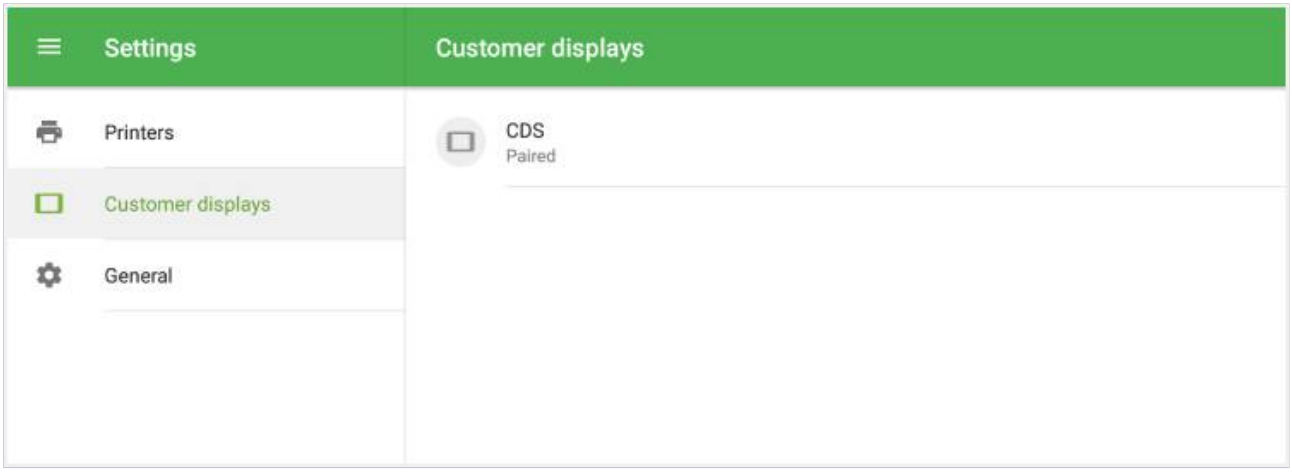


If you see a screen with a blank ticket, then your customer display is paired with Loyverse POS.

At the Loyverse POS, the button ‘Pair’ will change to ‘Unpair’. Save your settings at Loyverse POS.



Now you can see your paired Customer Display on the list.



In the same way, you can connect several CDS to the same POS.

See also:

How Loyverse CDS Customer Display Works

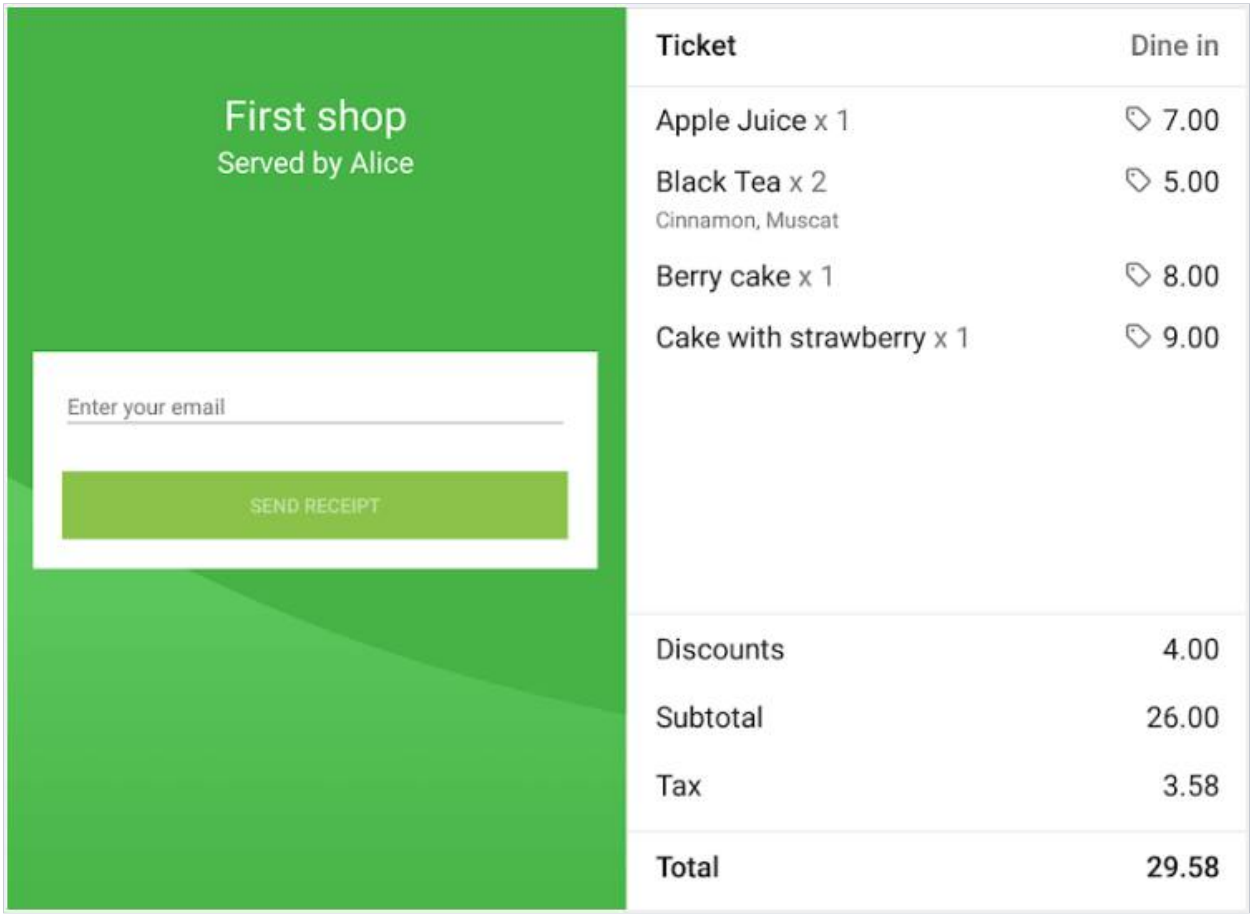
How Loyverse CDS Customer Display Works

Video
https://www.youtube.com/watch?v=eL4xseB5FGA

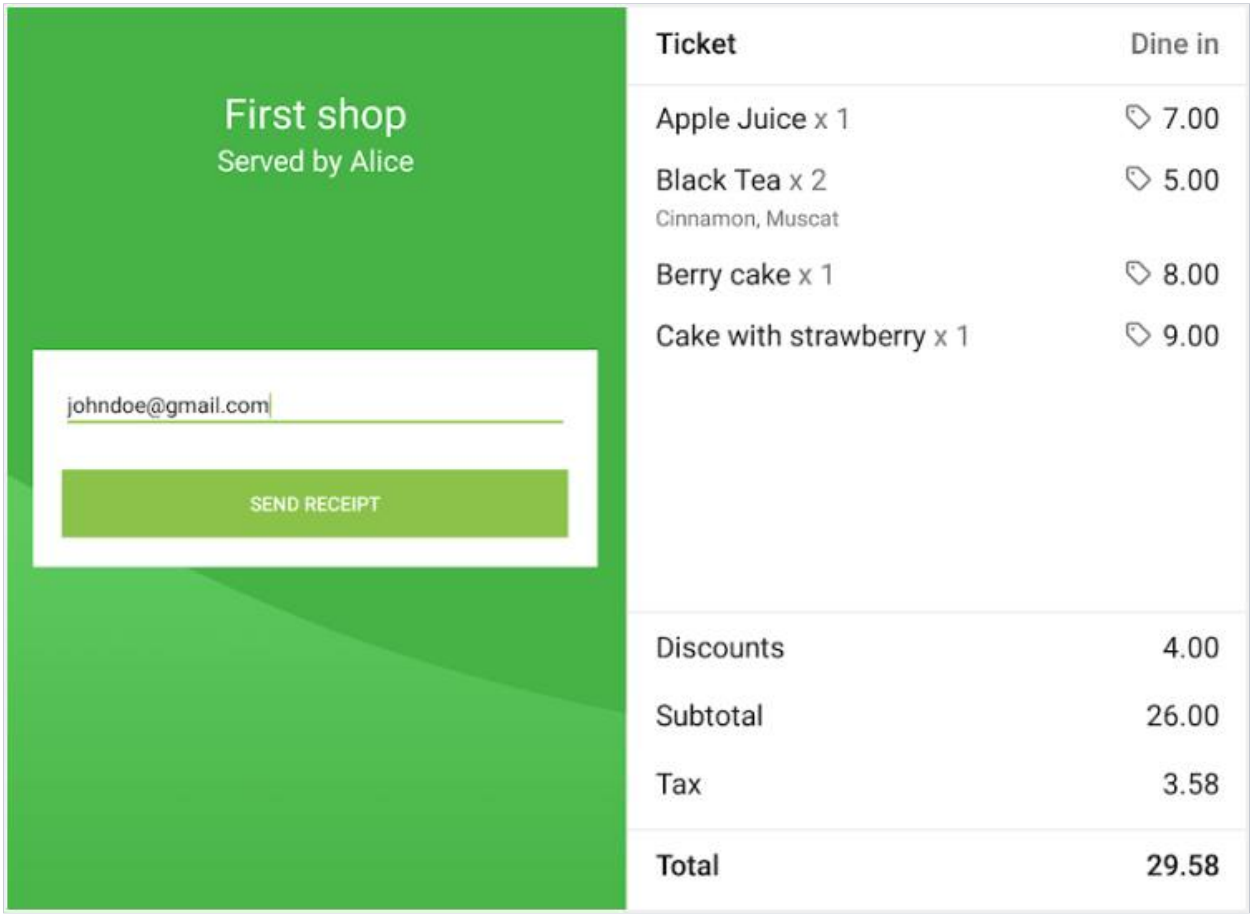
Please refer to the Loyverse CDS setup guide and make sure your Loyverse CDS app (Android or iOS**) is configured correctly.**

Now that you have Loyverse CDS setup, it will display order information from the ticket during sales.

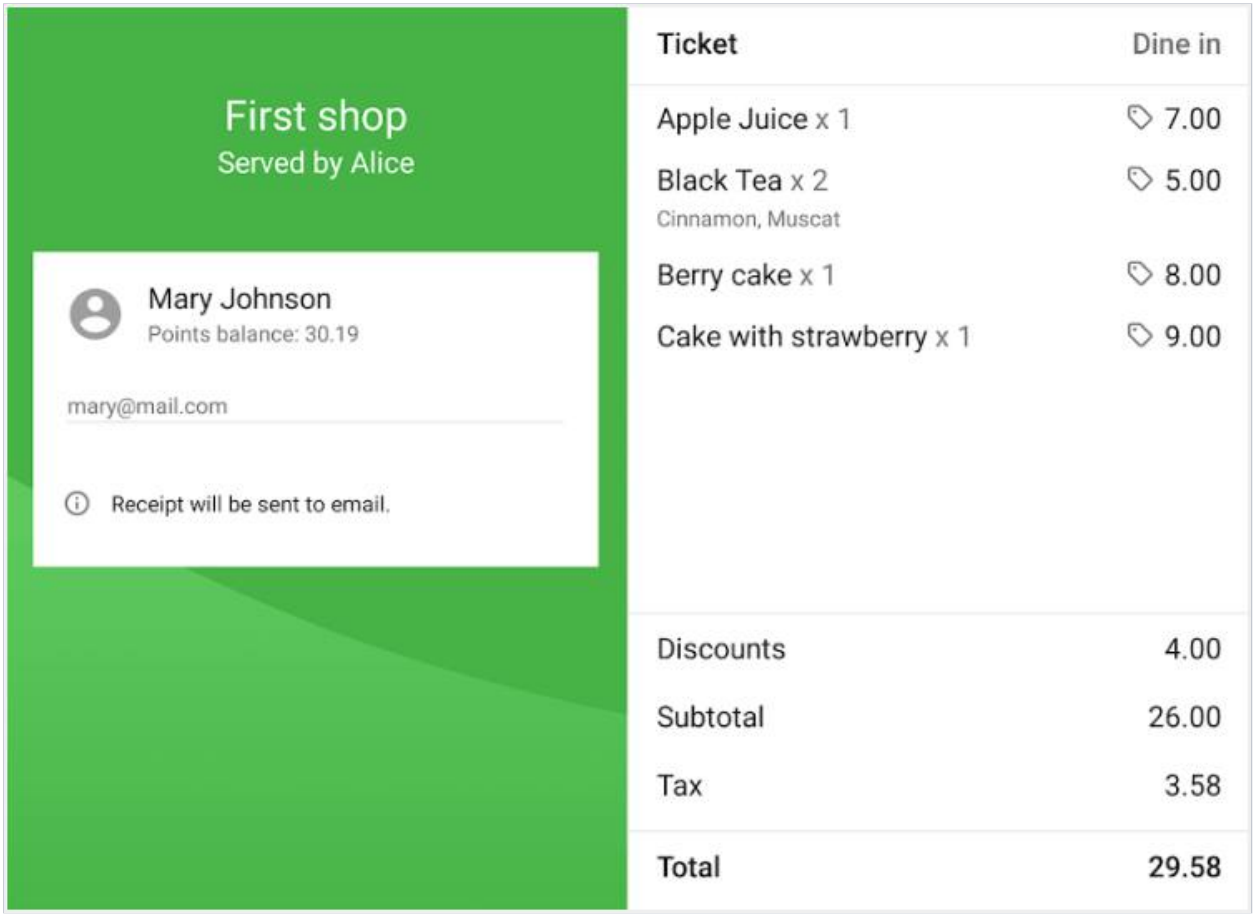
On the right side of the screen, there is the ticket with the list of items. CDS will display modifiers, discounts, and taxes applied to items as well as to full ticket.



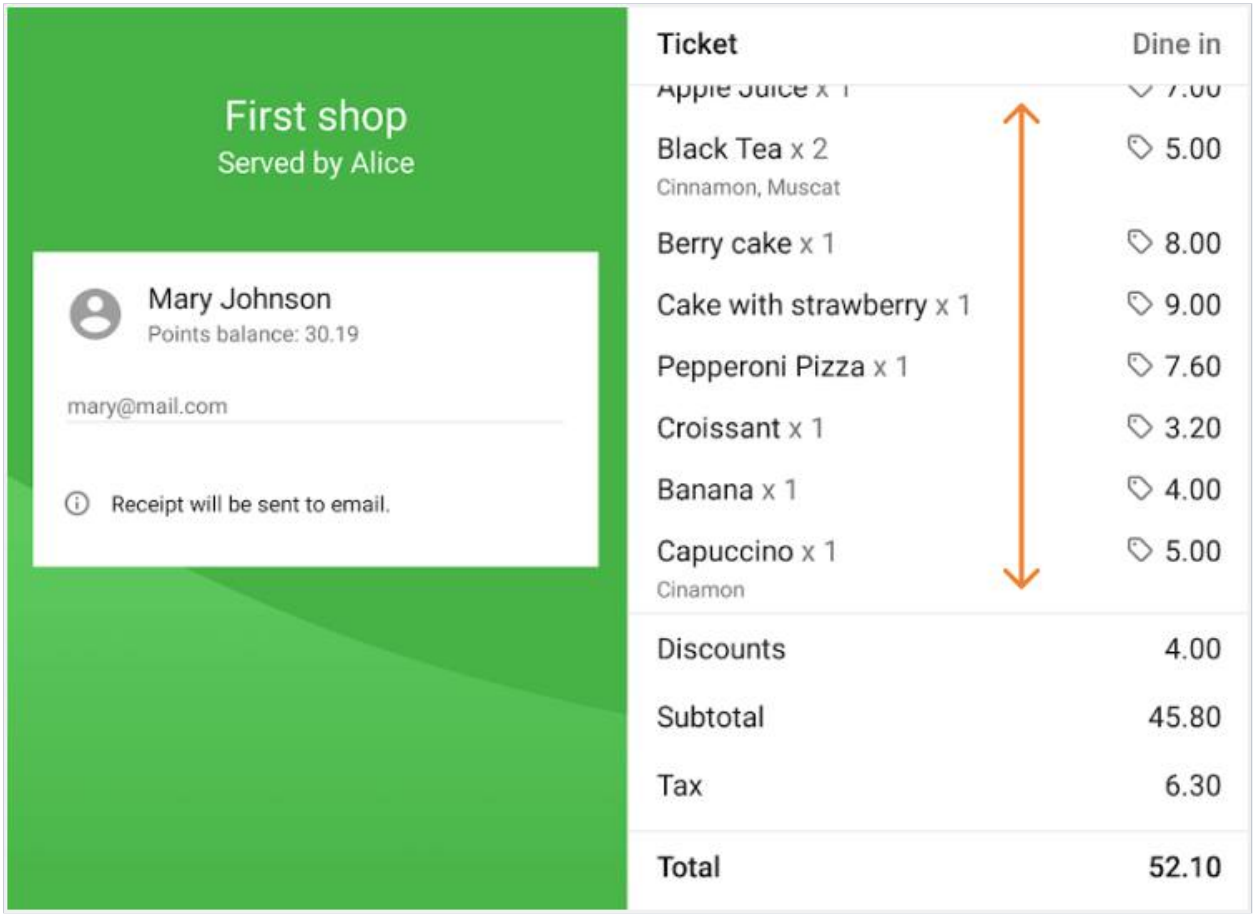
On the left side of the screen, the store and cashier names are displayed, and a field that the customer can fill in an E-mail to receive an e-receipt.



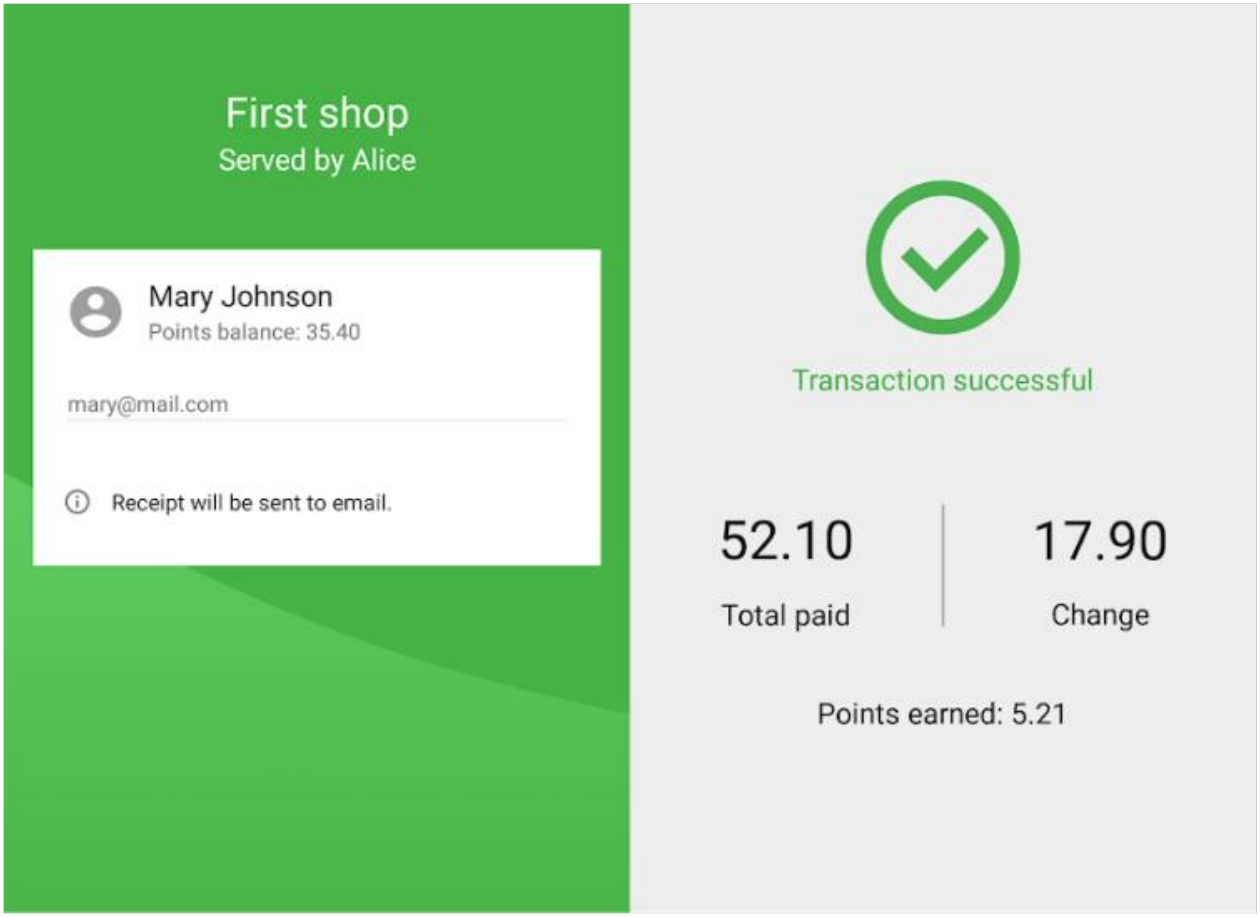
If you have assigned a customer to a ticket, the CDS displays this customer's name, bonus points balance, and Email.



If the ticket is too long, a customer can use a vertical scroll to look through all items.



After a customer has been charged, customer screen displays the total value of payment and change.



See also:

Customer Display System Configuration Guide

How to Delete Customers from the Base

Video
https://www.youtube.com/watch?v=XSzfqnLI6nM

Customer profiles can only be deleted through the **Back Office**, not via the Loyverse POS app.

Steps to Delete Customers

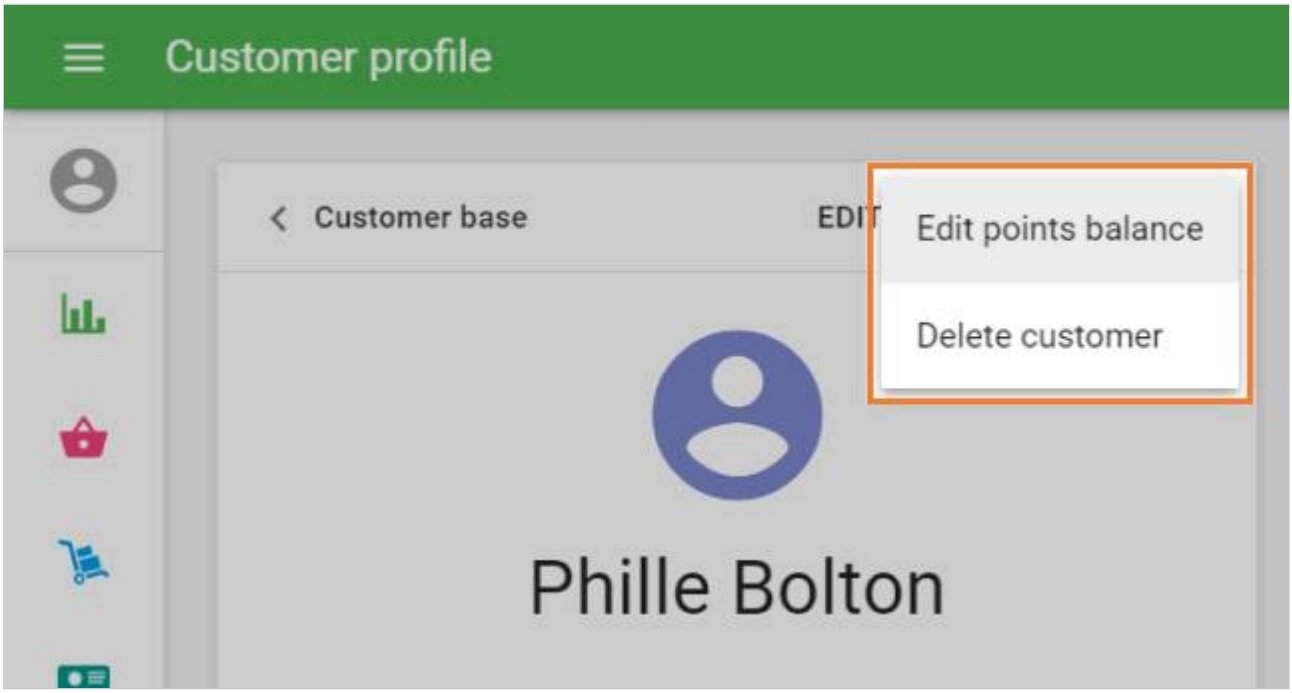
1. **Log in to the Back Office** at loyverse.com and go to the '**Customers**' section in the left-hand menu.
2. In your **Customer base** list, locate the customers you want to delete.
   You can use the search bar to quickly find customers by name, phone number, or email.
3. **Select one or multiple customers** by clicking the checkbox next to their names.
4. Click the '**Delete**' button at the top of the list.

5. Confirm the deletion in the pop-up confirmation window.

Note: Deleting a customer is permanent and cannot be undone. Deleted customers will be removed from all POS devices.

Additional Tip

To delete a single customer, you can also open their profile, click the '**More**' menu in the top right corner, and choose '**Delete customer**'.



See also:

How to Sign Up a Customer in Loyverse POS

Importing and Exporting Customers

Reports

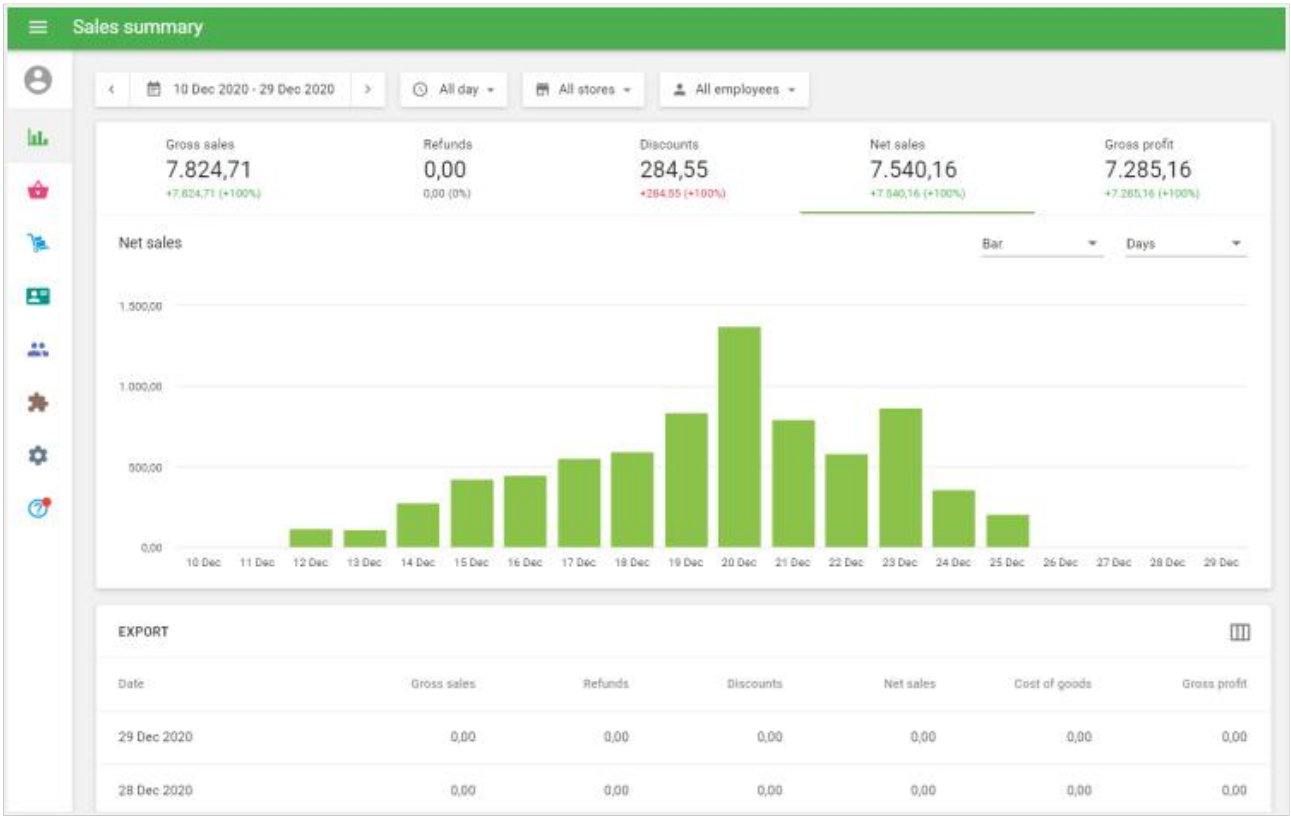
Sales reports

Sales Summary Report in the Back Office

Video
https://www.youtube.com/watch?v=KvtocjryOpw

The **Sales Summary** report provides an overview of your store's key sales metrics and helps you quickly evaluate business performance for a selected period.

When you open the **Back Office**, the **Sales Summary** section is displayed by default and shows the most important sales information at a glance.

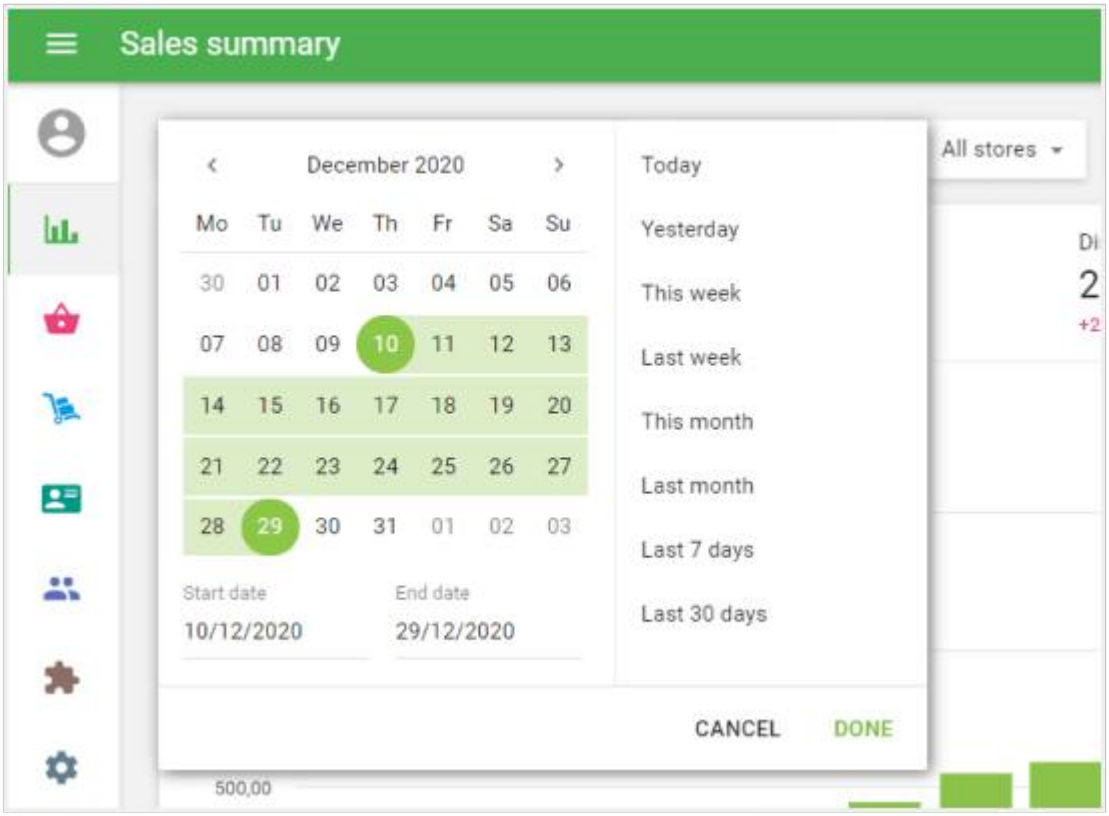


1. Report Filters

At the top of the report, you can configure filters to refine your data:

- **Period:** Today, Yesterday, This week, This month, or a **Custom** date range
- **Stores:** Select one or multiple stores (if you manage several locations)

- **Employees:** Filter sales by one or multiple employees



Note:
By default, access to sales data is limited to the **last 31 days**.
Start a free trial or subscribe to **Unlimited Sales History** to analyze sales for any time period.

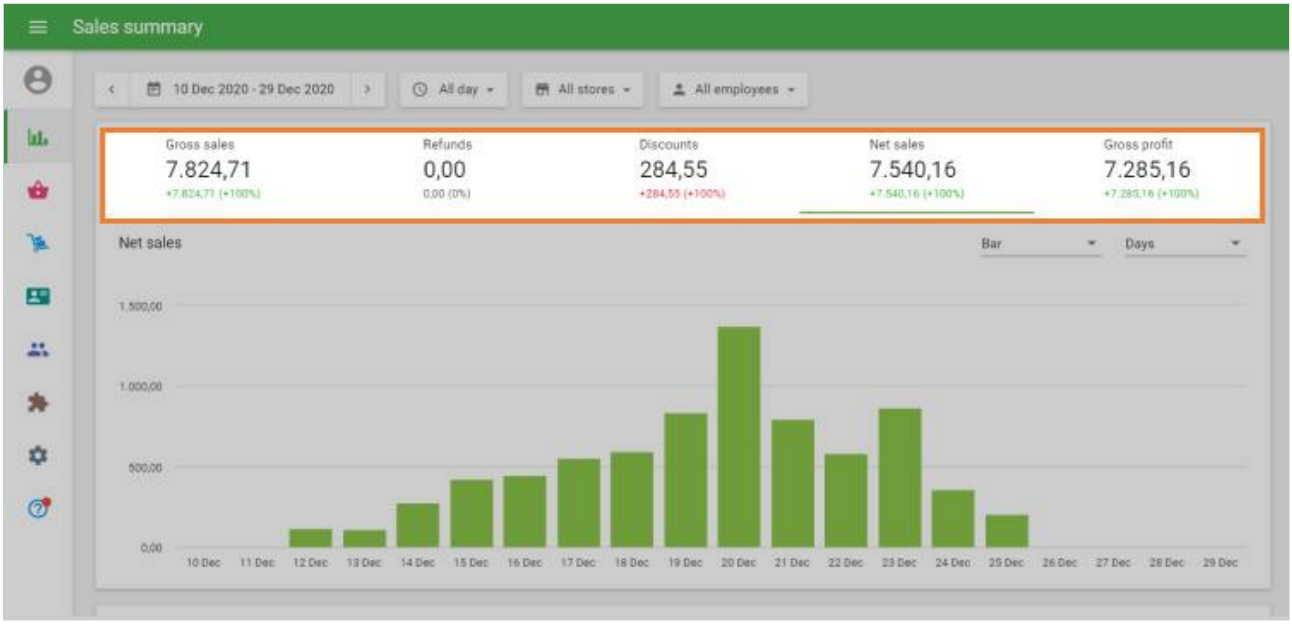
2. Key Sales Metrics

The Sales Summary includes tabs with the main sales indicators:

- **Gross sales**
- **Refunds**
- **Discounts**
- **Net sales**
- **Gross profit**

Below each value, you can see a comparison showing how much the result increased or decreased compared to the **previous equivalent period**.

Clicking on any metric opens a chart with detailed data for the selected period.



3. Definitions of Sales Metrics

Gross Sales

Gross sales represent the total revenue **before discounts and refunds**.

Calculation rules:

- Calculated as the sum of item prices **before discounts, tips, and taxes**
- If tax is **included** in the item price, it is included in Gross Sales
- Taxes **added on top of the price** are not included
- Modifier costs are included
- Discounts are not included

Refunds

Refunds represent the total value of returned items.

Calculation rules:

- Calculated as the sum of returned item prices **before discounts, tips, and taxes**
- If tax is included in the item price, it is included in the refund amount

Discounts

Discounts show the total value of all discounts applied.

Calculation:
Total discounts on sales receipts minus total discounts on refund receipts

Net Sales

Net sales reflect the actual revenue after reductions.

Formula:

Net Sales = Gross Sales – Discounts – Refunds

Gross Profit

Gross profit shows how much you earned after deducting the cost of goods sold.

Formula:

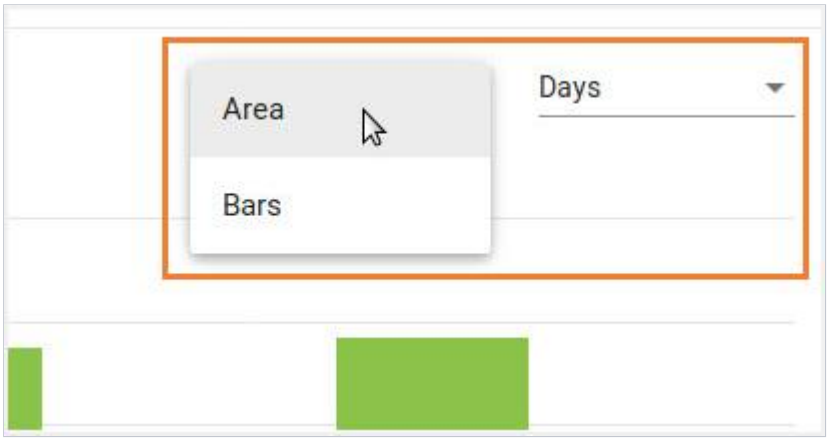
Gross Profit = Net Sales – Cost of Goods

4. Sales Charts

In the chart view, you can customize how data is displayed:

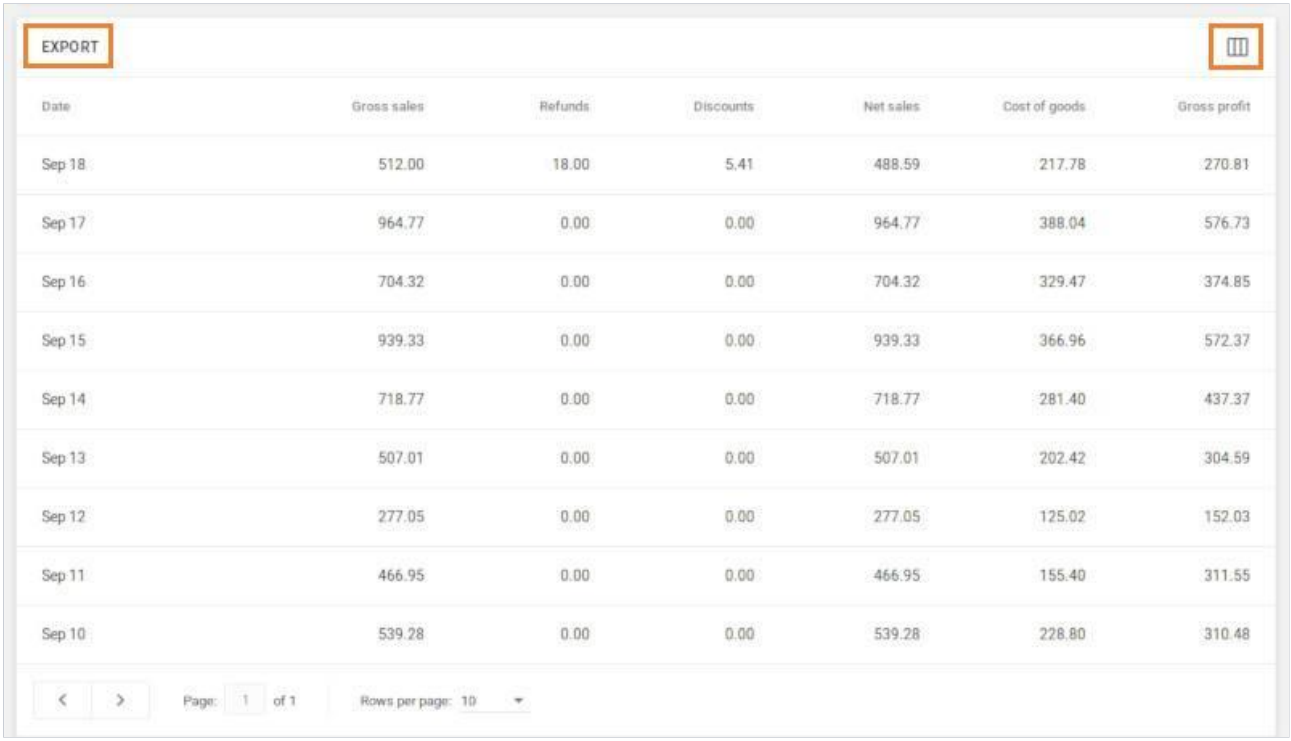
- **Chart type:** Area or Bars
- **Grouping:** Hourly, Daily, Weekly, Monthly, Quarterly, or Yearly

This helps analyze sales trends over different time periods.



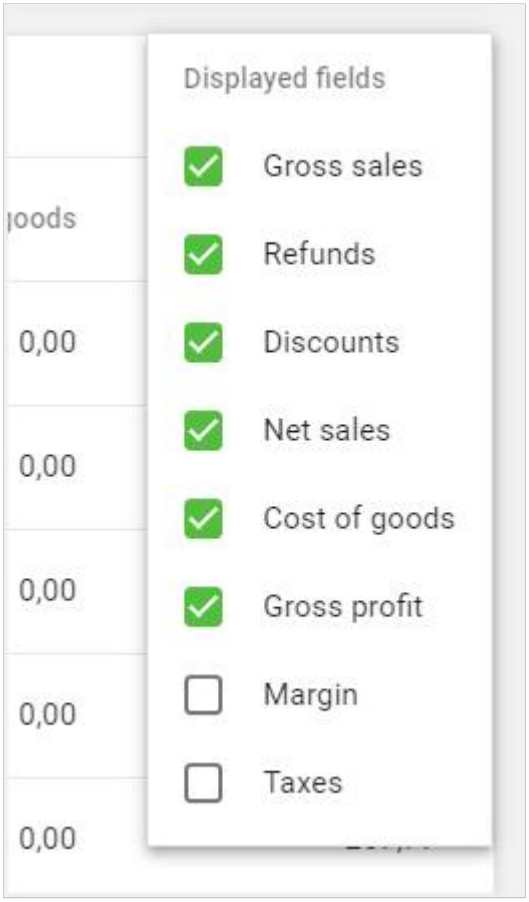
5. Sales Summary Table

At the bottom of the page, you'll find a table with sales summary values broken down **by day**.



You can:

- **Export** the Sales Summary report by clicking the Export button
  Note: Exporting sales reports is available with the **Unlimited Sales History** subscription.
- **Customize columns** using the three-vertical-lines icon on the right side of the table header



See also:

Sales Report by Category

Receipts Section in the Reports in the Back Office

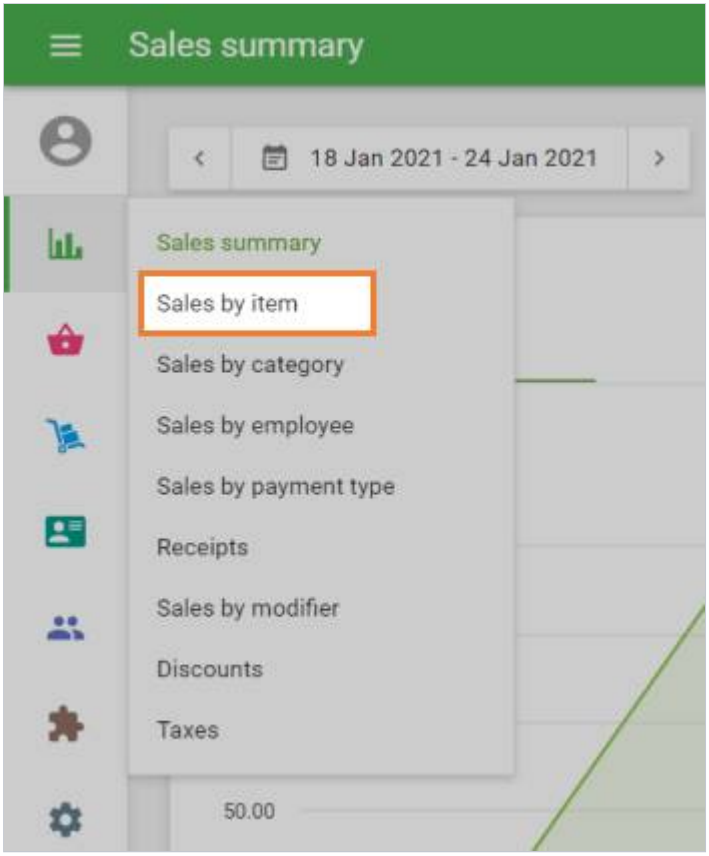
Sales by Item Report in the Back Office

Video
https://www.youtube.com/watch?v=KvtocjryOpw

The **Sales by Item** report helps you analyze how individual items perform over a selected period, including sales volume, revenue, costs, and profitability.

Accessing the Report

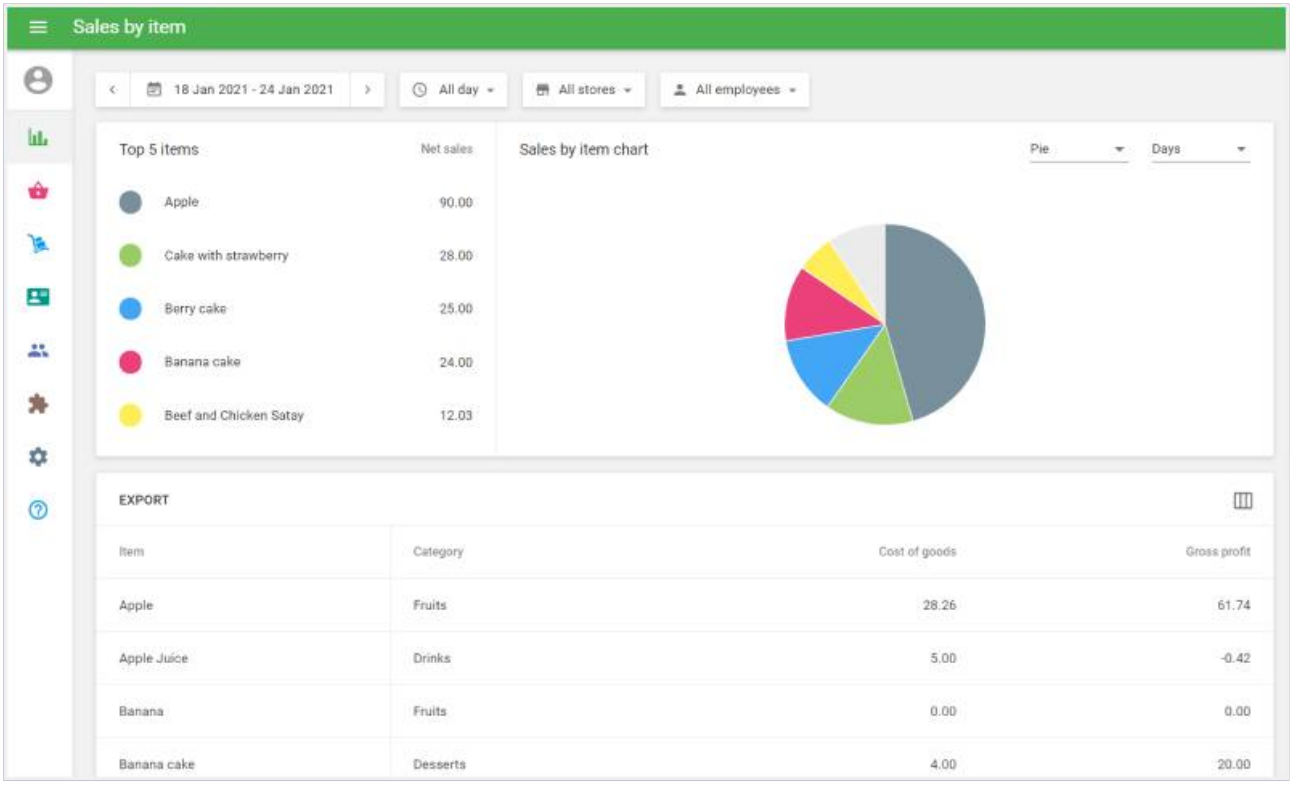
In the Back Office, go to **Reports → Sales by item**.



Selecting a Time Period

At the top of the page, choose the reporting period:

- Today
- Yesterday
- This week
- This month
- Custom period



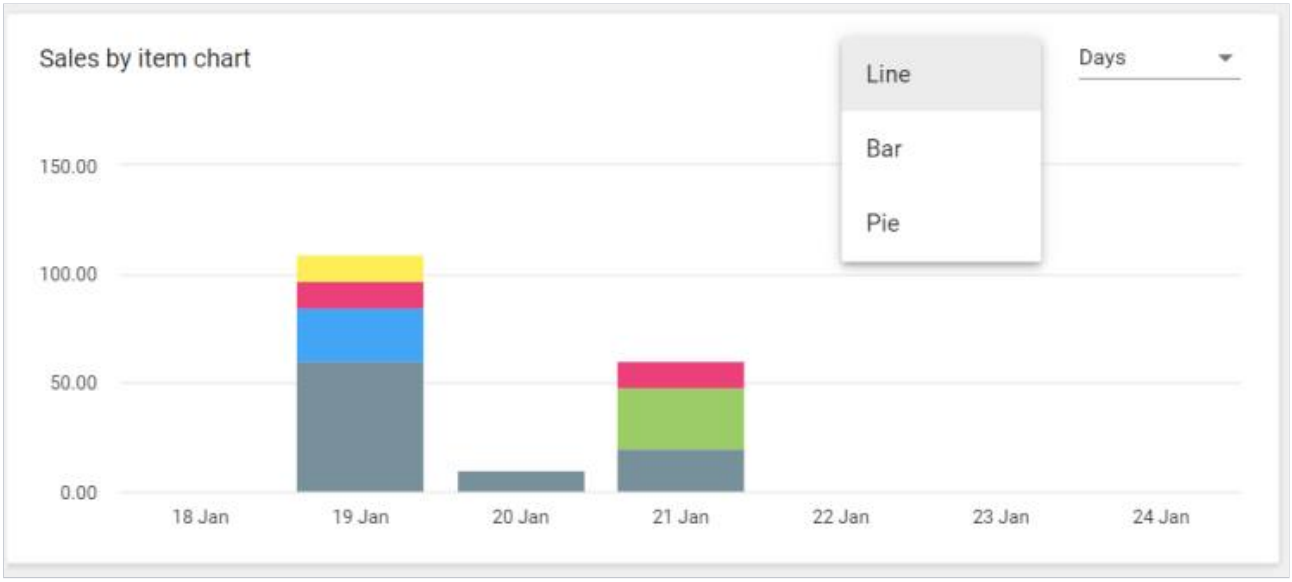
Overview Section

At the top of the report, you'll see a summary of your item sales:

- The **top 5 items** are displayed based on **Net sales**
- Each item shows its **total Net sales** for the selected period

Sales by Item Chart

On the right side, the **Sales by item chart** visualizes item performance.

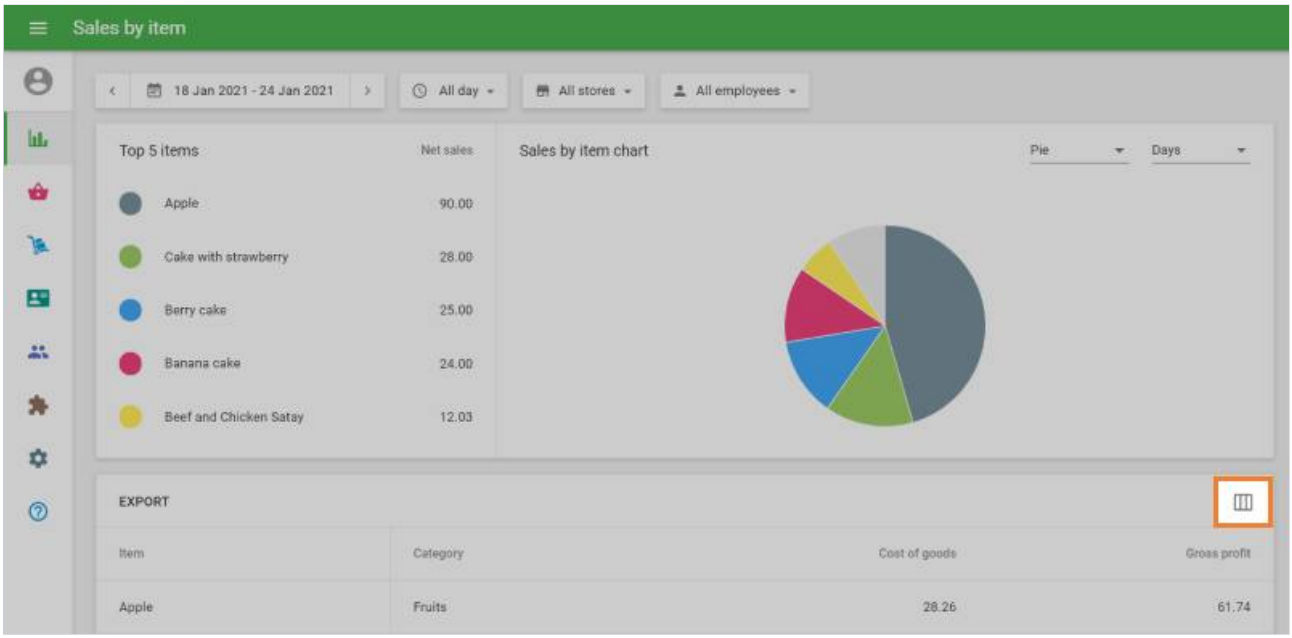


You can:

- Switch between **Bar**, **Line**, or **Pie** charts
- Group data by **Hours, Days, Weeks, Months, Quarters, or Years**

Detailed Data Table

Below the chart, a detailed table displays sales data for each item.



You can:

- Customize visible columns by clicking the **three-line icon** on the right side of the table header
- Sort items by any column

Available Report Parameters

- **SKU** – Stock Keeping Unit, a unique identifier for each item (See details in How to Add Items in the Loyverse Back Office)
- **Category** – The category assigned to the item
- **Items sold** – Total quantity sold during the selected period
- **Gross sales** – Total revenue before discounts and refunds (See details in Sales Summary Report in the Back Office)
- **Items refunded** – Total quantity of refunded items
- **Refunds** – Total refunded amount

- **Discounts** – Total discounts applied to the item
- **Net sales** – Revenue after discounts and refunds
  Net Sales = Gross Sales – Discounts – Refunds
- **Cost of goods** – Cost of the item
- **Gross profit** – Profit after deducting item costs
  Gross Profit = Net Sales – Cost of Goods
- **Margin** – Profit margin of the item
- **Taxes** – Total taxes applied to the item

Exporting the Report

You can export the **Sales by Item** report for the selected period:

- Click the **Export** button above the table
- The report is downloaded as a **CSV file**
- Open the file in **Google Sheets**, **Excel**, or similar spreadsheet tools

Note:
In the free version, access to sales reports is limited to the last 31 days only.
Exporting sales reports is also unavailable in the free version.
To view sales data for any time period and export reports, start a free trial or subscribe to **Unlimited Sales History**.

See also:

Receipts Section in the Reports in the Back Office

Sales Report by Category in Loyverse POS

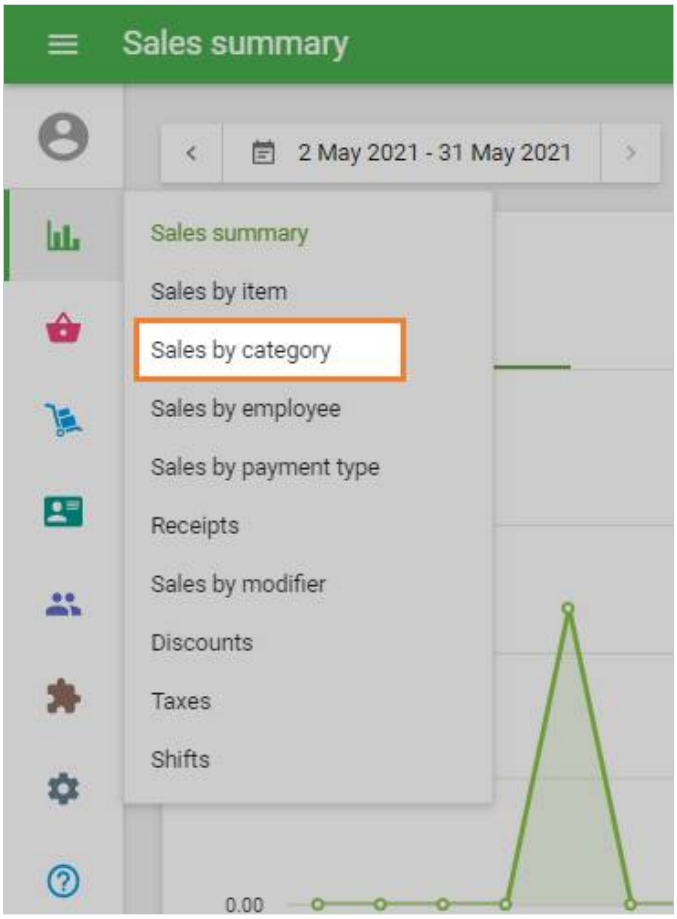
Sales Report by Category

Video
https://www.youtube.com/watch?v=KvtocjryOpw

The **Sales by Category** report helps you analyze how different product categories perform over a selected period. It allows you to compare revenue, costs, and profitability across categories, making it easier to identify top-performing and underperforming product groups.

Accessing the Report

Log in to the [Back Office] and go to **Reports → Sales by category**.



Report Columns and Metrics

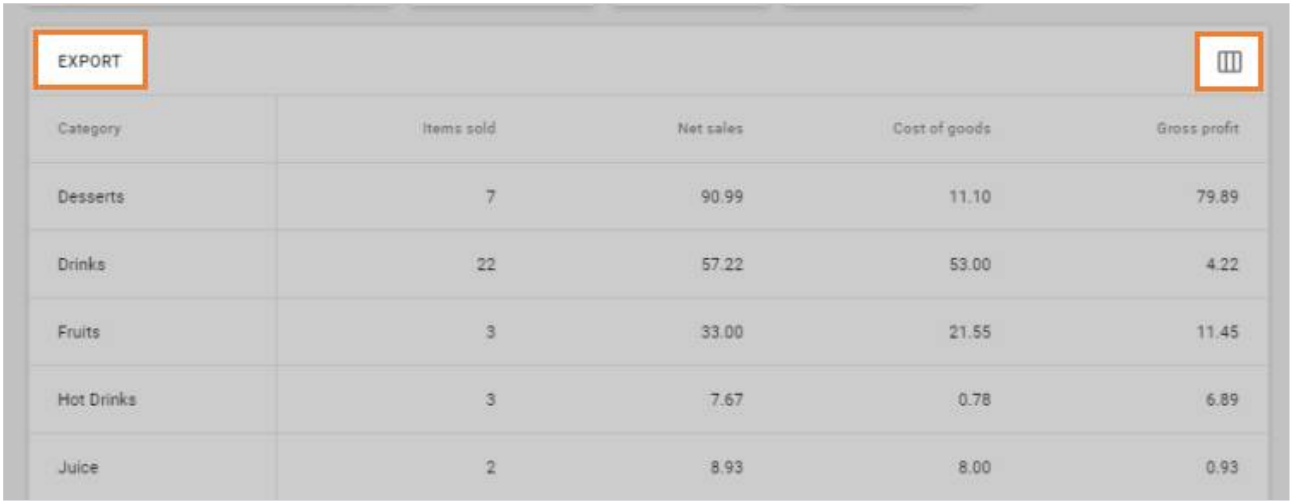
By default, the report displays the following columns:

- **Category** — List of item categories
- **Items sold** — Total number of items sold within each category
- **Net sales** — Revenue generated by the category after discounts and refunds
- **Cost of goods** — Total cost of sold items in the category
- **Gross profit** — Net sales minus the cost of goods

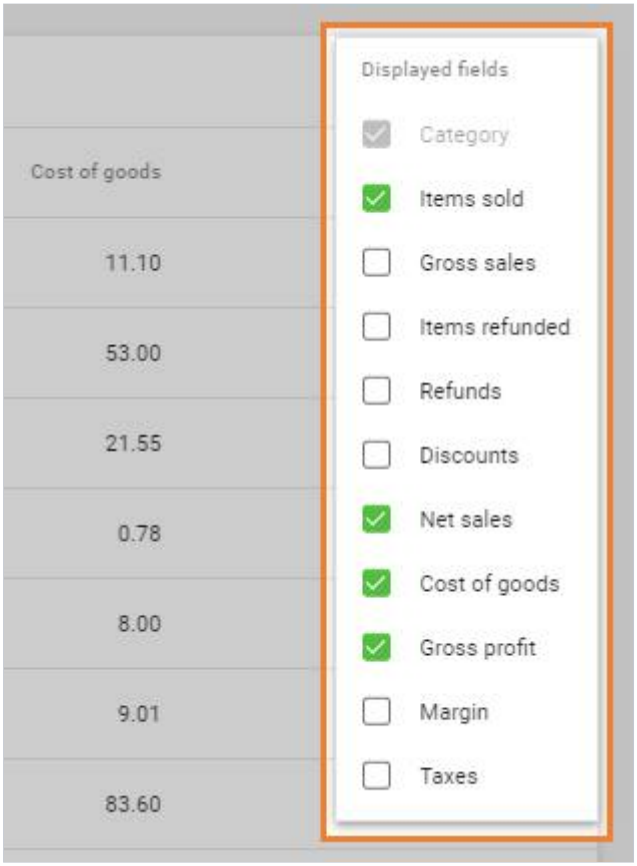
Customizing Report Columns

You can add or remove columns to tailor the report:

Click the **three-vertical-lines icon** at the end of the table header.



Select the columns you want to display.

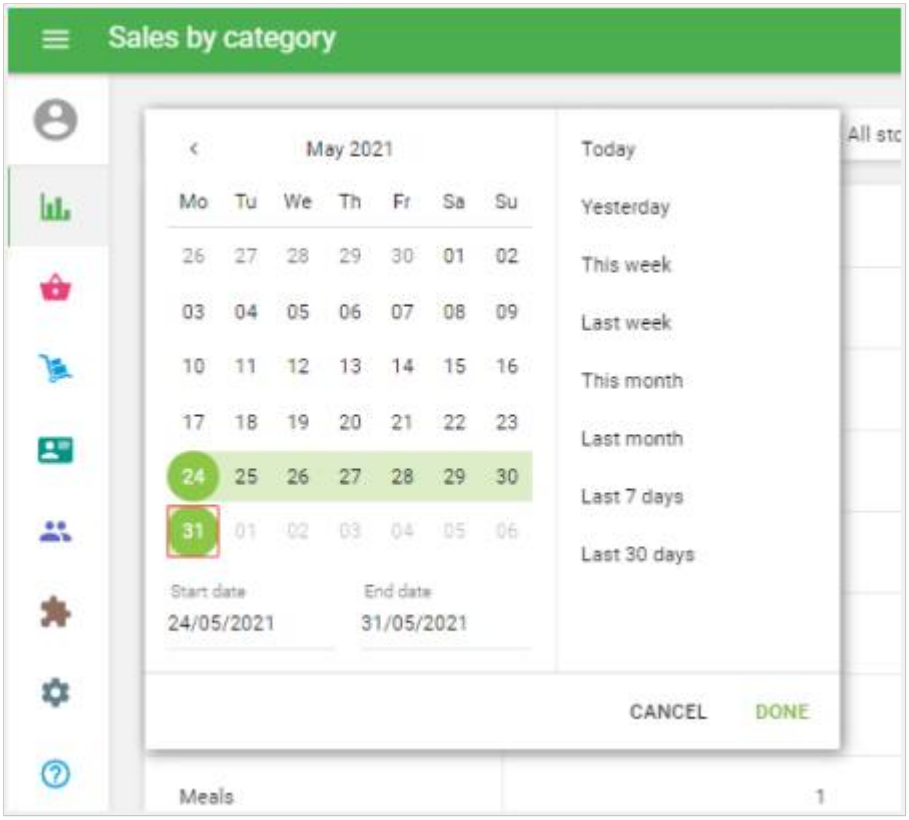


The report will update automatically.

Selecting the Reporting Period

You can filter the report by time:

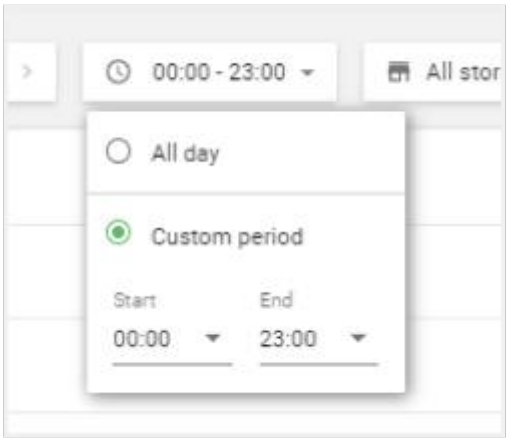
- **Quick presets:** Today, Yesterday, This week, This month
- **Custom date range:** Click the **calendar icon**, choose start and end dates, and click **Done**



Custom Time Within a Day

If you need data for a specific time range during the day:

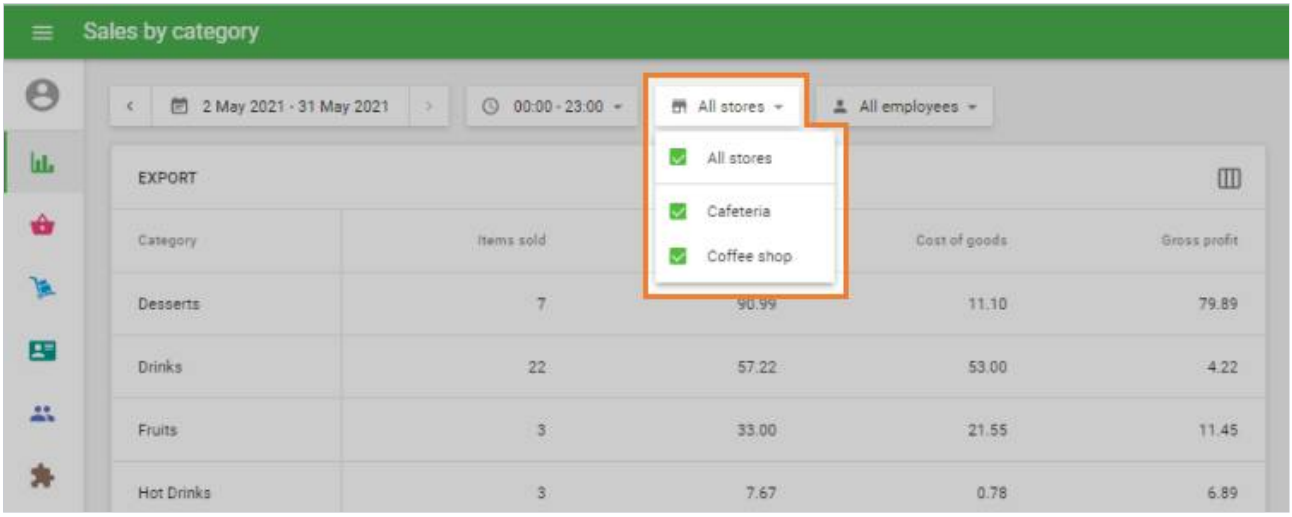
- Select **Custom period** instead of **All day**
- Set the **start** and **end** time



Filtering by Store

If you have multiple stores, you can:

- View data for **all stores**, or
- Select **specific stores** using the store filter



Free Version Limitation

Note:
In the free version, access to sales reports is limited to the last 31 days only.

Exporting sales reports is also unavailable in the free version.

To view sales data for any time period and export reports, start a free trial or subscribe to **Unlimited Sales History**.

See also:

Sales Summary Report in the Back Office

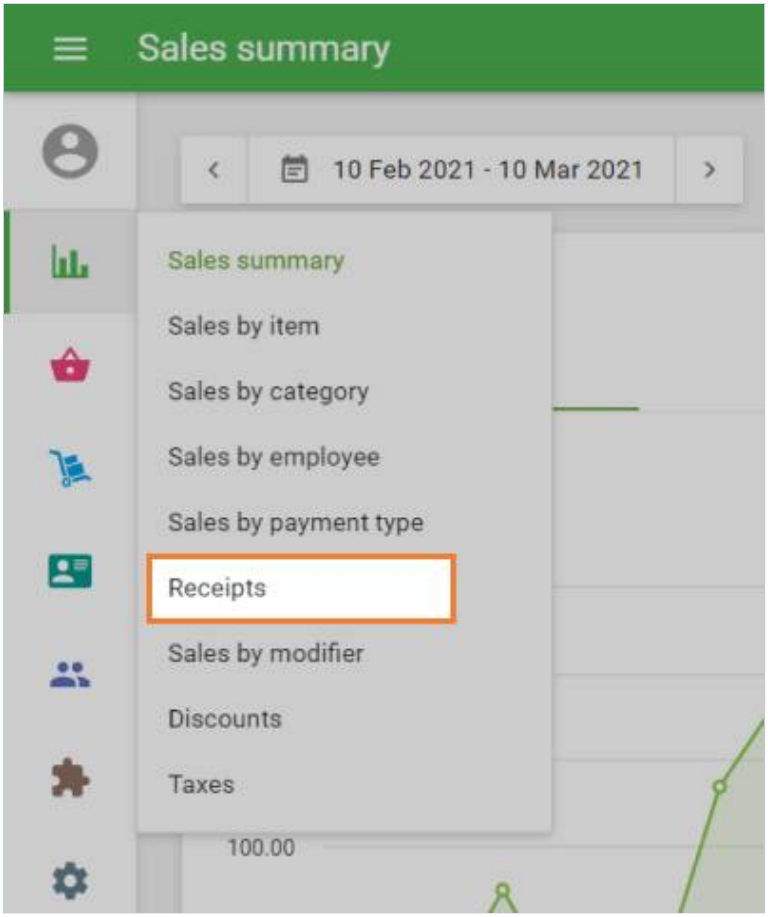
How to Create and Manage Multiple Stores under One Account

Receipts Section in the Reports in the Back Office

The **Receipts** section in the Back Office allows you to review, filter, and export detailed information about all transactions recorded in your Loyverse account.

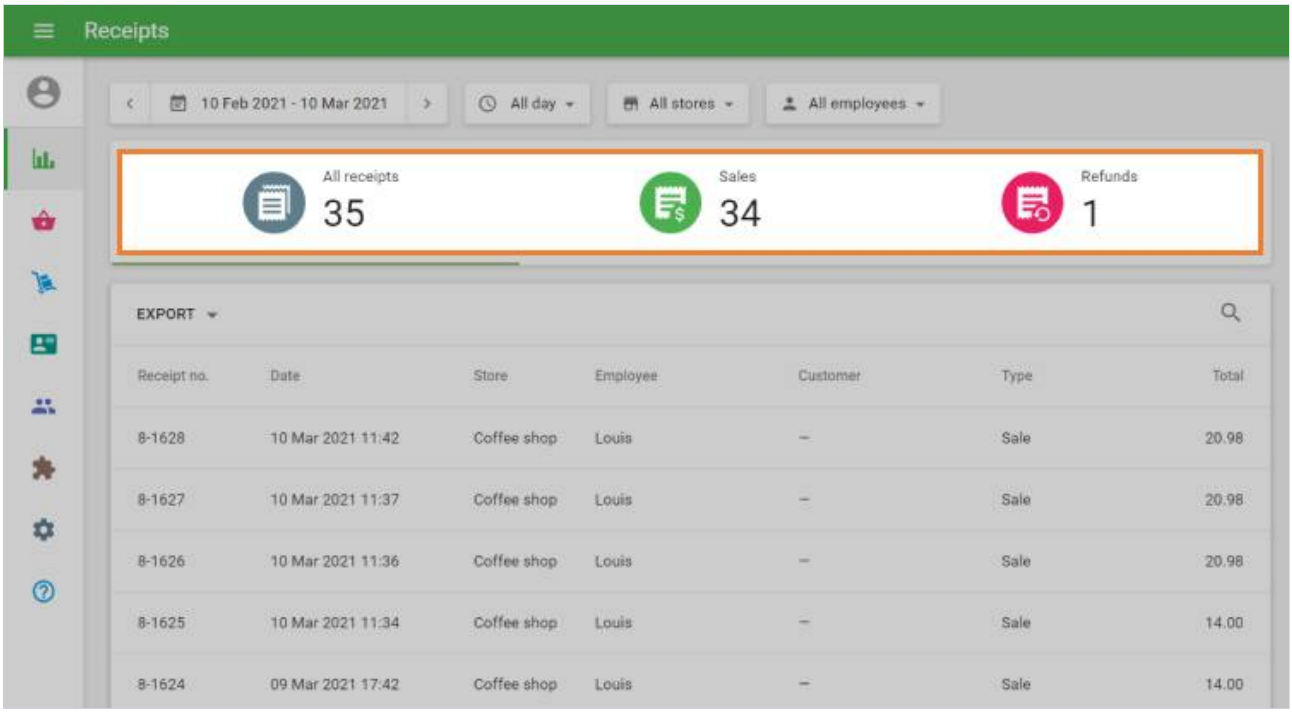
Accessing the Receipts Section

In the Back Office, open the **Reports** menu and select **Receipts**.



Selecting the Reporting Period

At the top of the page, use the date and time selectors to choose the period you want to review. You can select predefined ranges or set a custom period.



Receipt Types Overview

Above the receipts list, you'll find quick filters for different receipt types:

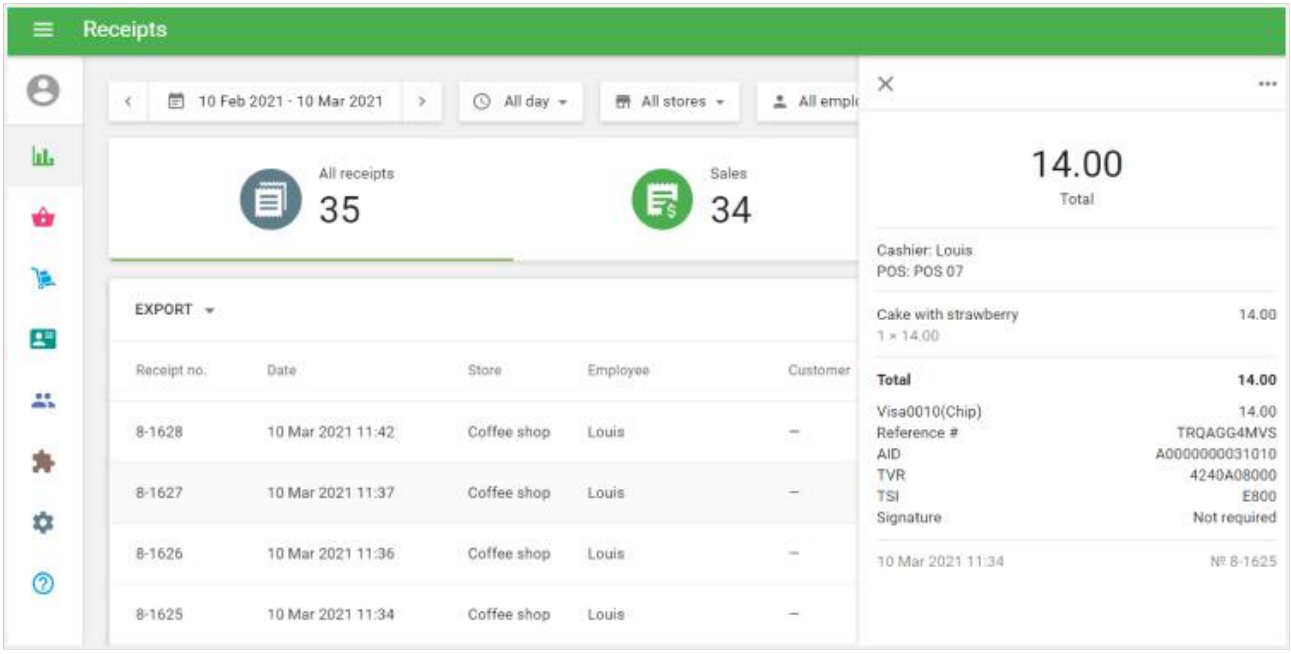
- **All receipts**
- **Sales**
- **Refunds**

Clicking any of these options will display only the selected receipt type in the list.

Viewing Receipt Details

Each receipt is displayed as a row in the list.

- Hover over a receipt to highlight the entire row
- Click on a receipt to open its detailed view on the right side of the screen



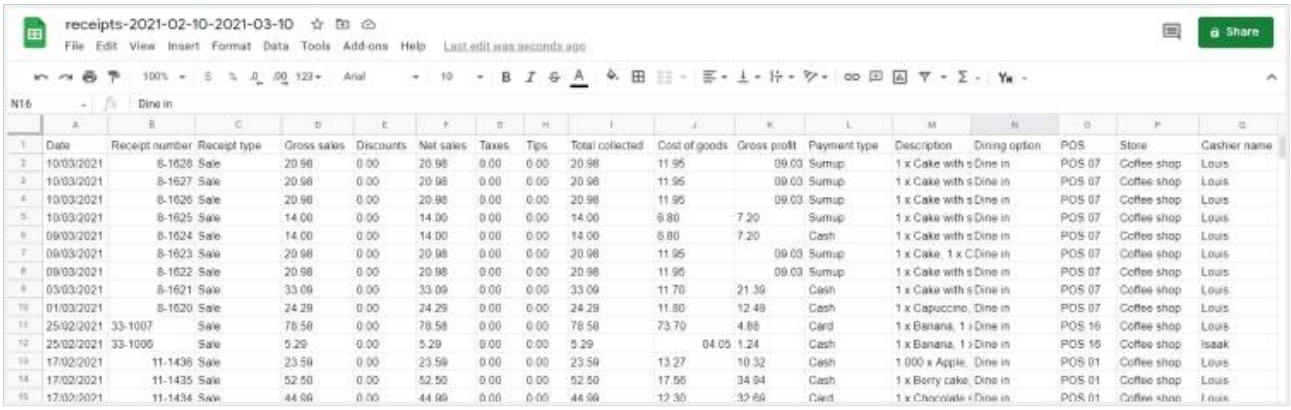
The receipt details include information such as items sold, taxes, discounts, payment method, POS device, employee, and customer (if assigned).

Exporting Receipts

You can export receipts for the selected period and receipt type:

1. Apply the necessary filters (date range and receipt type).
2. Click the **Export** button.
3. Download the CSV file to your computer.

The exported file can be opened and analyzed using spreadsheet tools such as **Google Sheets**, **LibreOffice Calc**, or **Microsoft Excel**.



Date	Receipt number	Receipt type	Gross sales	Discounts	Net sales	Taxes	Tips	Total collected	Cost of goods	Gross profit	Payment type	Description	Dining option	POS	Store	Cashier name
10/03/2021	8-1628	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
10/03/2021	8-1627	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
10/03/2021	8-1626	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
10/03/2021	8-1625	Sale	14.00	0.00	14.00	0.00	0.00	14.00	6.80	7.20	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
09/03/2021	8-1624	Sale	14.00	0.00	14.00	0.00	0.00	14.00	6.80	7.20	Cash	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
09/03/2021	8-1623	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake, 1 x C	Dine in	POS 07	Coffee shop	Louis
09/03/2021	8-1622	Sale	20.98	0.00	20.98	0.00	0.00	20.98	11.95	09.03	Sumup	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
05/03/2021	8-1621	Sale	33.09	0.00	33.09	0.00	0.00	33.09	11.70	21.39	Cash	1 x Cake with s	Dine in	POS 07	Coffee shop	Louis
01/03/2021	8-1620	Sale	24.29	0.00	24.29	0.00	0.00	24.29	11.80	12.49	Cash	1 x Capuccino,	Dine in	POS 07	Coffee shop	Louis
25/02/2021	33-1007	Sale	78.58	0.00	78.58	0.00	0.00	78.58	73.70	4.88	Card	1 x Banana, 1 x	Dine in	POS 16	Coffee shop	Louis
25/02/2021	33-1006	Sale	5.29	0.00	5.29	0.00	0.00	5.29	04.05	1.24	Cash	1 x Banana, 1 x	Dine in	POS 16	Coffee shop	Isaak
17/02/2021	11-1436	Sale	23.59	0.00	23.59	0.00	0.00	23.59	13.27	10.32	Cash	1.000 x Apple,	Dine in	POS 01	Coffee shop	Louis
17/02/2021	11-1435	Sale	52.50	0.00	52.50	0.00	0.00	52.50	17.56	34.94	Cash	1 x Berry cake,	Dine in	POS 01	Coffee shop	Louis
17/02/2021	11-1434	Sale	44.99	0.00	44.99	0.00	0.00	44.99	12.30	32.69	Card	1 x Chocolate c	Dine in	POS 01	Coffee shop	Louis

Note: Exporting reports may be subject to subscription limitations depending on your plan.

See also:

How to See the Purchase History of Registered Customers

How to Open CSV File in Google Sheets

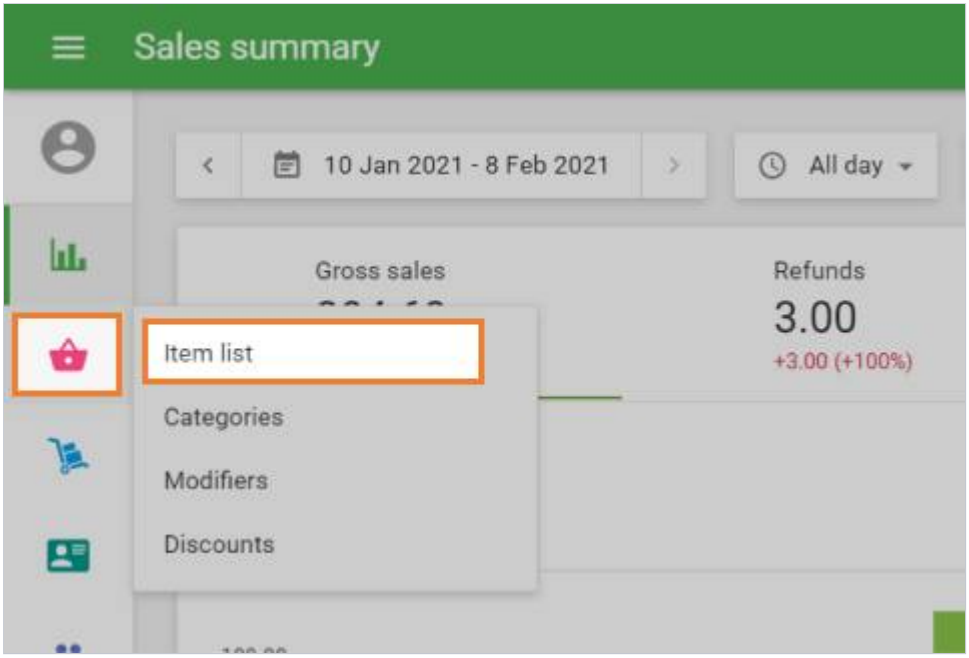
Exporting data

How to Export Data from Loyverse Account

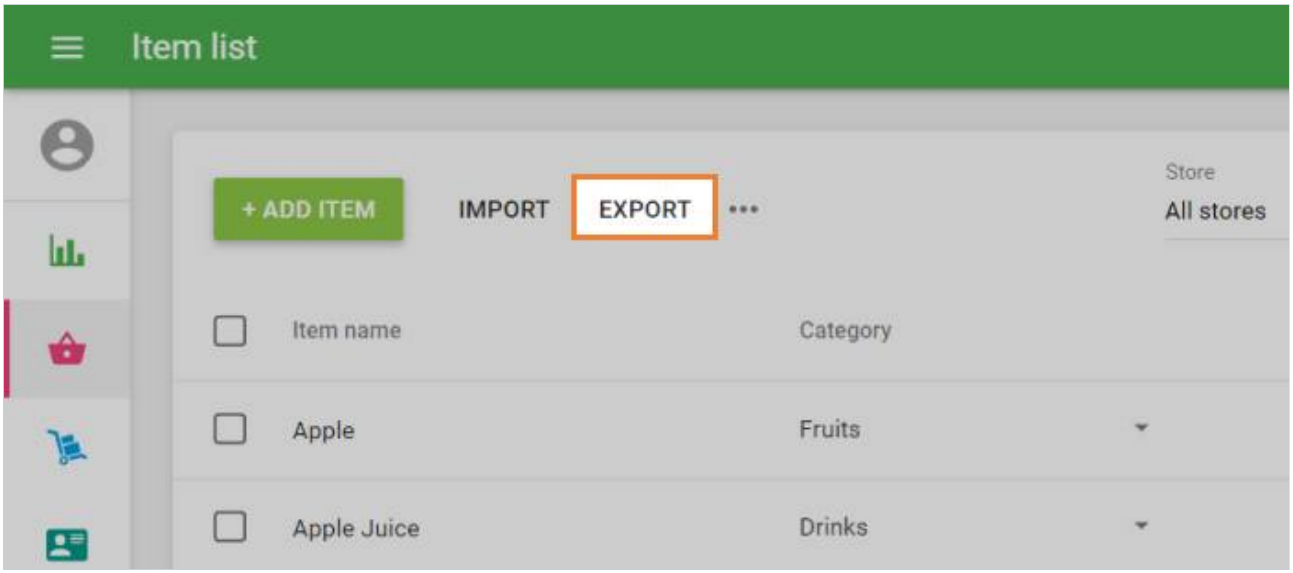
You can export data in CSV format from the Loyverse account at the Back office. There are such data to export: items, customers, receipts, and reports. If you use Advance Inventory, there are also reports to download as CSV and various documents that you can download one by one as PDF or CSV files.

Exporting Items List

Go to the 'Item list' at the Back Office.



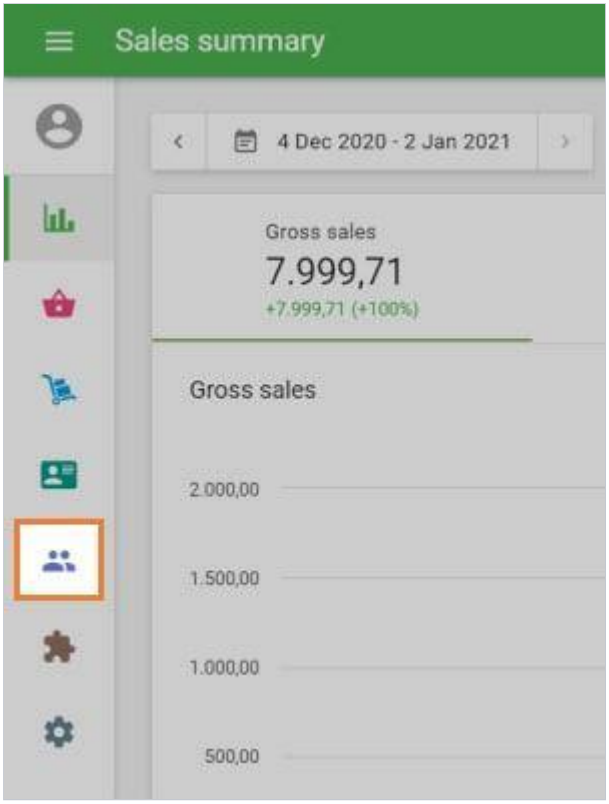
Click on the ‘Export’ button.



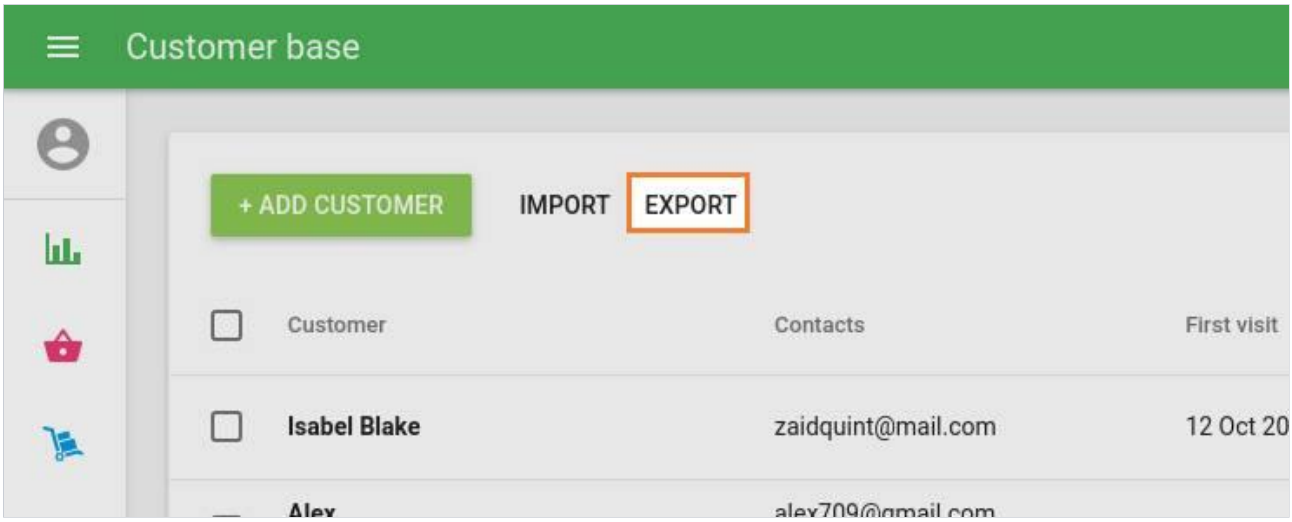
The system will download the CSV file with all items to your device.
Note: There are no images in the exported file and no possibility to export them.

Exporting Customers List

Go to the 'Customers' menu at the Back Office.



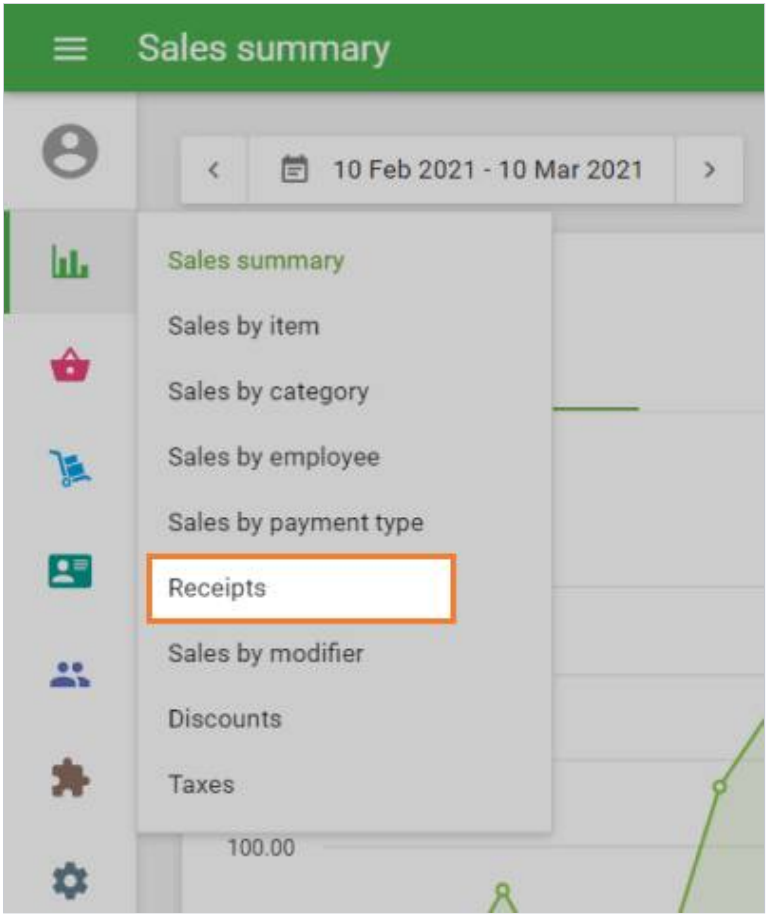
Click on the ‘Export’ button.



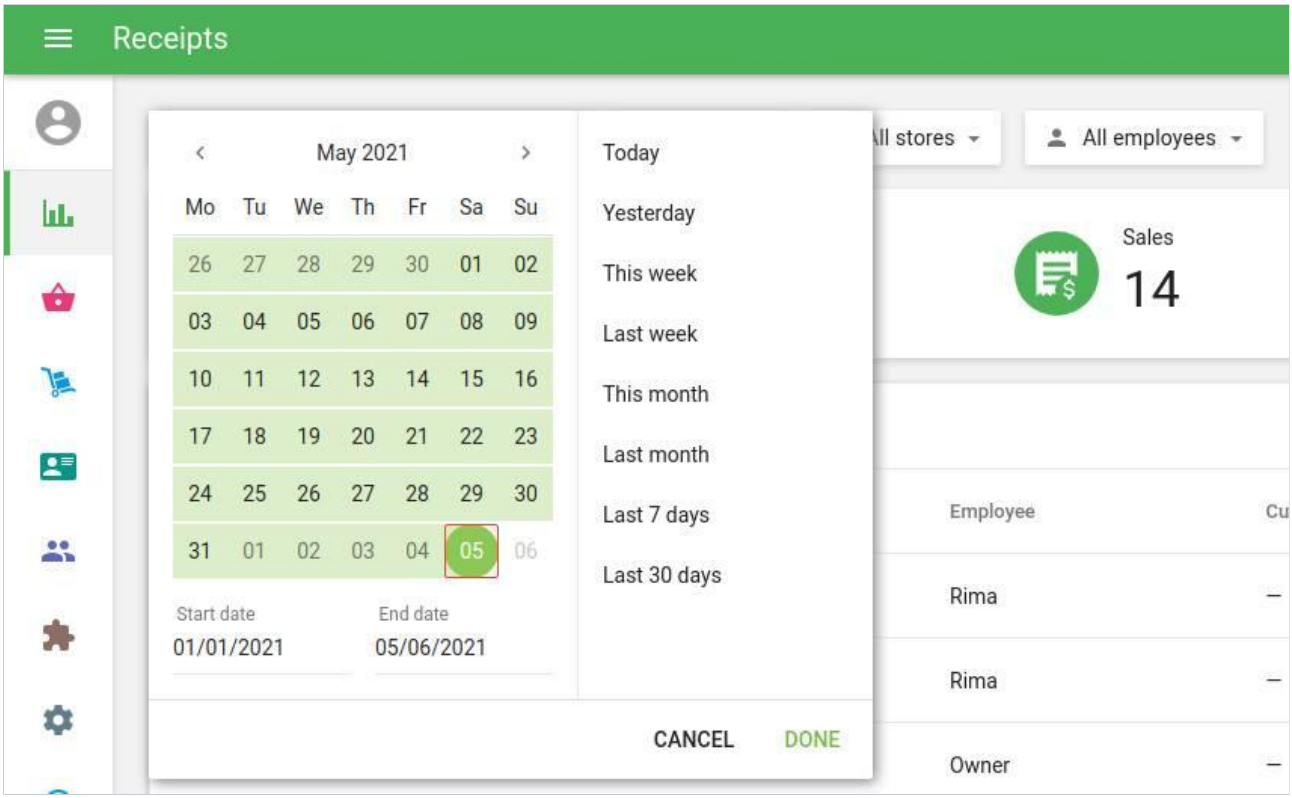
The system will download the CSV file with all customers to your device.

Exporting Receipts List

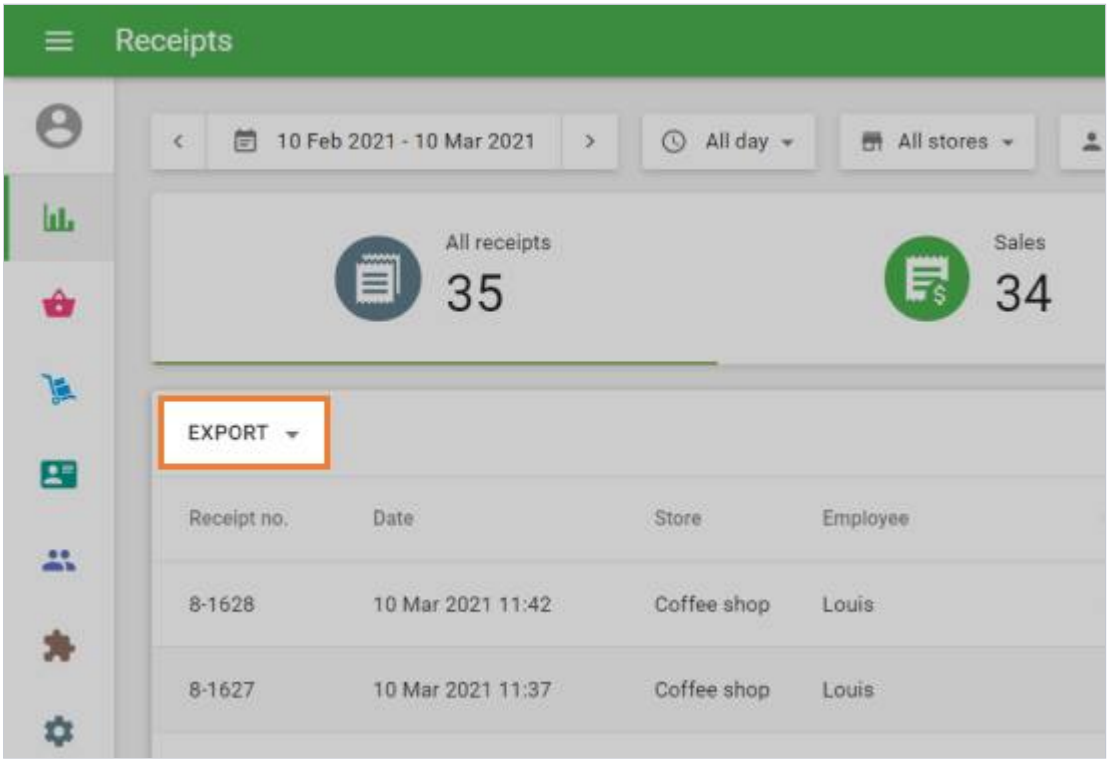
Go to the ‘Receipts’ section in the ‘Reports’ menu at the Back Office.



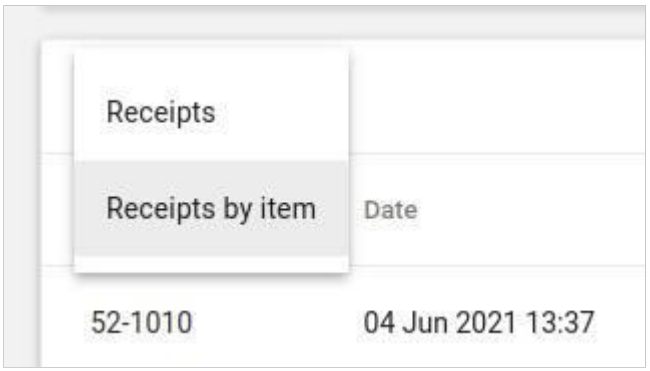
Select the period for which you wish to export receipts. If you want to export all receipts from your account, select the period from the first to the last day of your activity as well as 'All day,' 'All stores', and 'All employees' in the filter settings.



Click on the ‘Export’ button.



Select the exporting type: ‘Receipts’ or ‘Receipts by item’. The ‘Receipts by item’ give a detailed view of each item at the ticket, such as price, discounts, and taxes applied to it.

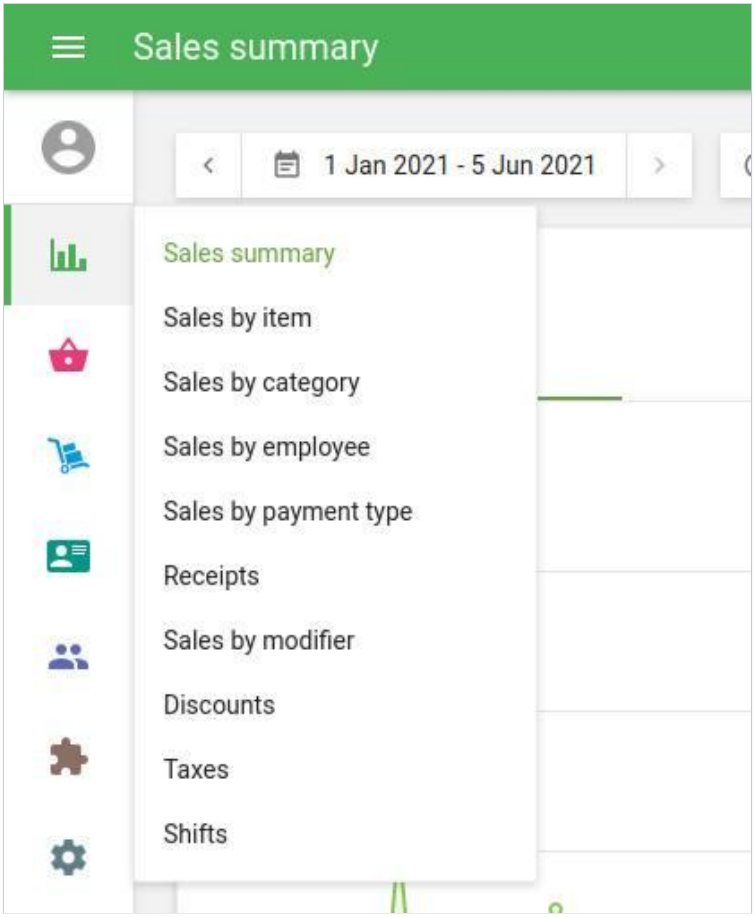


The CSV file with receipts will be downloaded to your device.

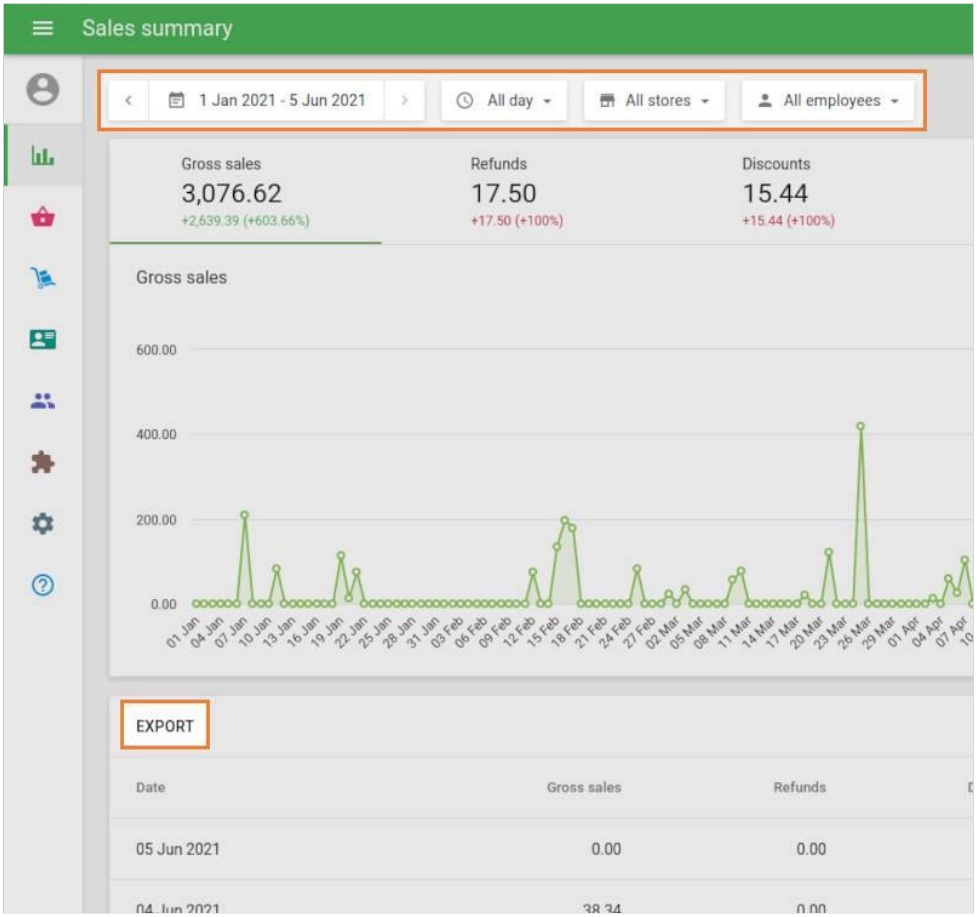
Exporting Reports

Each report at the Loyverse Back office has an export functionality. You can export reports: ‘Sales summary, ‘Sales by item’, ‘Sales by category’, ‘Sales by employee’, ‘Sales by payment type’, ‘Sales by modifier’, ‘Discounts’, ‘Taxes’ and ‘Shifts’.

Go to the needed section in the ‘Reports’ menu at the Back Office.



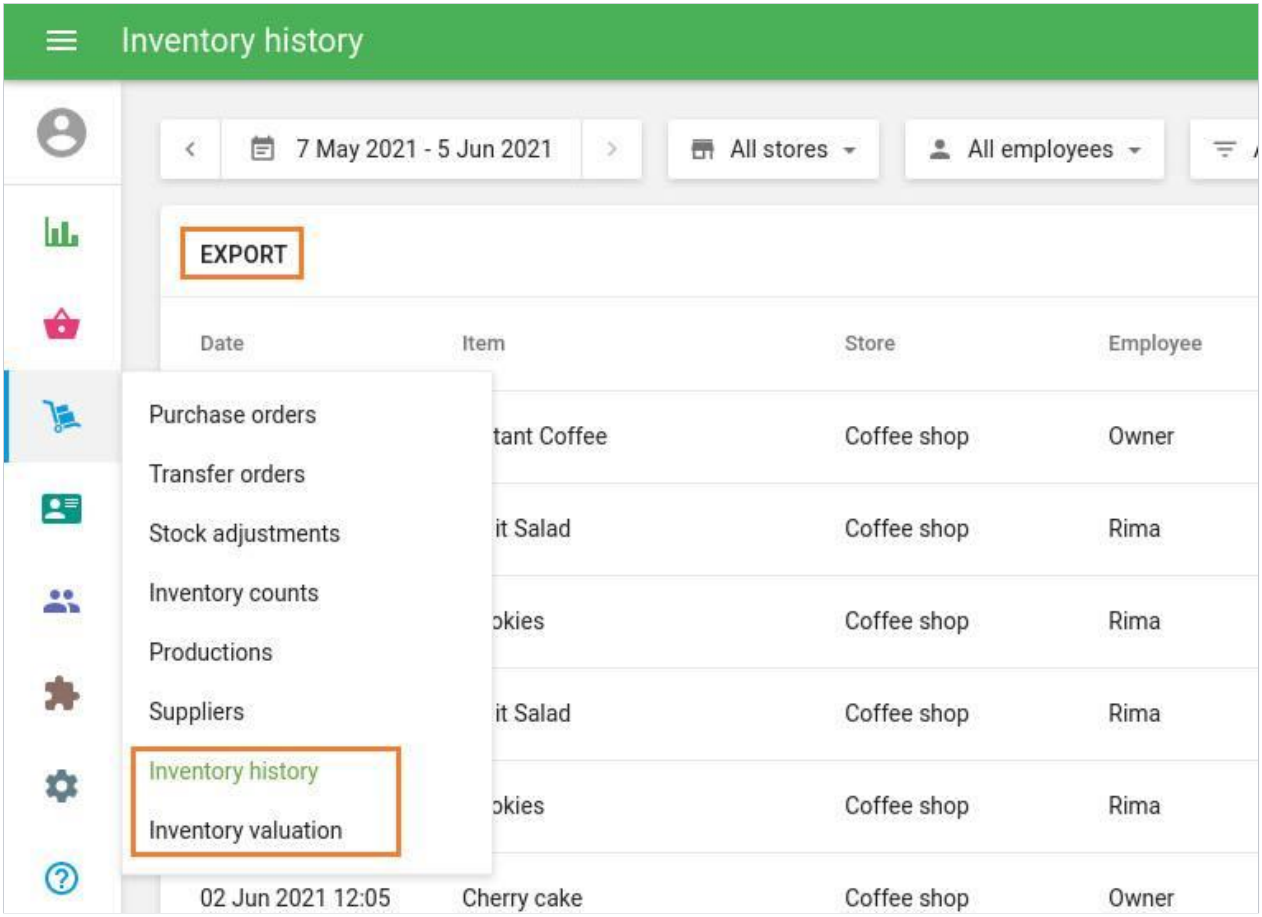
Select the period for which you wish to export the report. If you want to export the report for the whole period, select the period from the first to the last day of your activity in Loyverse, as well as ‘All day’, ‘All stores’, and ‘All employees’ in the filter settings.
Click on the ‘Export’ button.



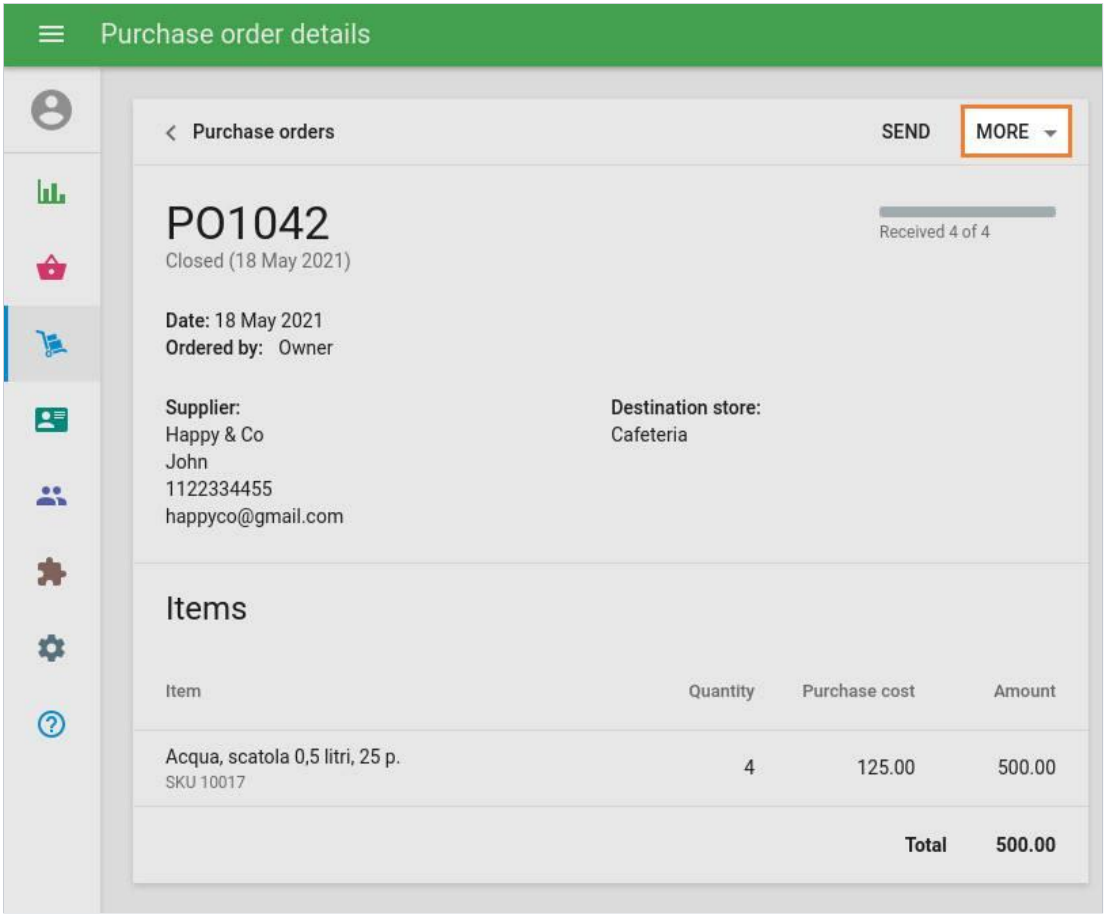
The system will download the CSV file with the report to your device.

Exporting Reports and Documents of the Advanced Inventory

If you use Advance Inventory, there are also Inventory history and Inventory valuation reports that you can download as CSV files by clicking on the ‘Export’ button.



If you use Advance Inventory, there are various documents, such as Purchase orders, Transfer orders, Stock adjustments, Inventory counts, Productions that you can download one by one as PDF or CSV files.
You have to open each document and click on the ‘More’ drop-down menu.



There are operations available with the document in the ‘More’ menu: ‘Save as PDF’, ‘Save as CSV’.



Note: The best way to open your CSV file is in Google Sheets, but you can also use other tools, such as LibreOffice Calc or OpenOffice Calc and Excel.

See also:

Exporting and Importing Items

Importing and Exporting Customers

Receipts Section in the Reports in the Back Office

Sales Summary Report in the Back Office

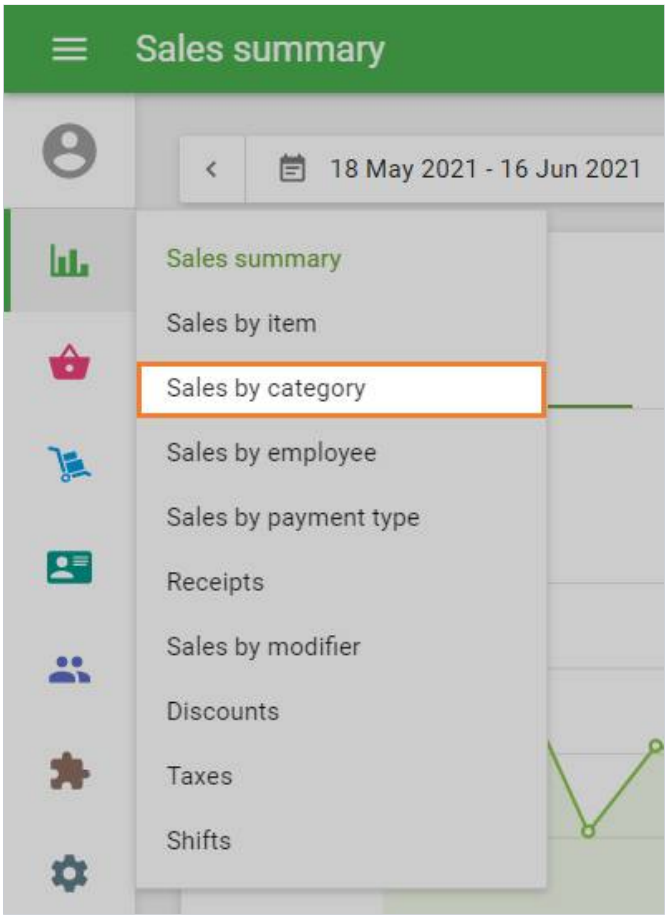
How to Export Data from Reports and Open in LibreOffice Calc or OpenOffice Calc

Loyverse allows you to export reports from the Back Office in **CSV format**, which can be opened and edited using spreadsheet applications such as **LibreOffice Calc** or **OpenOffice Calc**.

Exporting a Report from the Back Office

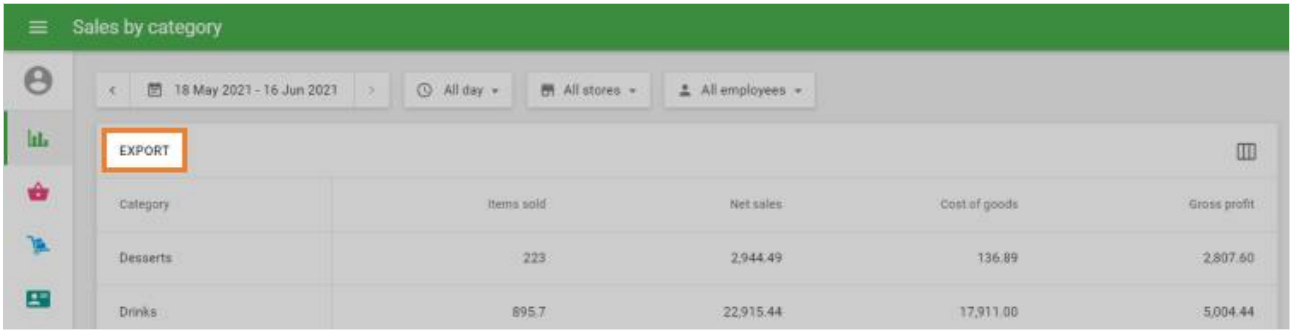
Log in to the **Back Office** and open the **Reports** section.

Select the report you want to export (for example, **Sales by category**).



Choose the required reporting period.

Click the **Export** button.



Enter a file name and save the file to your computer.

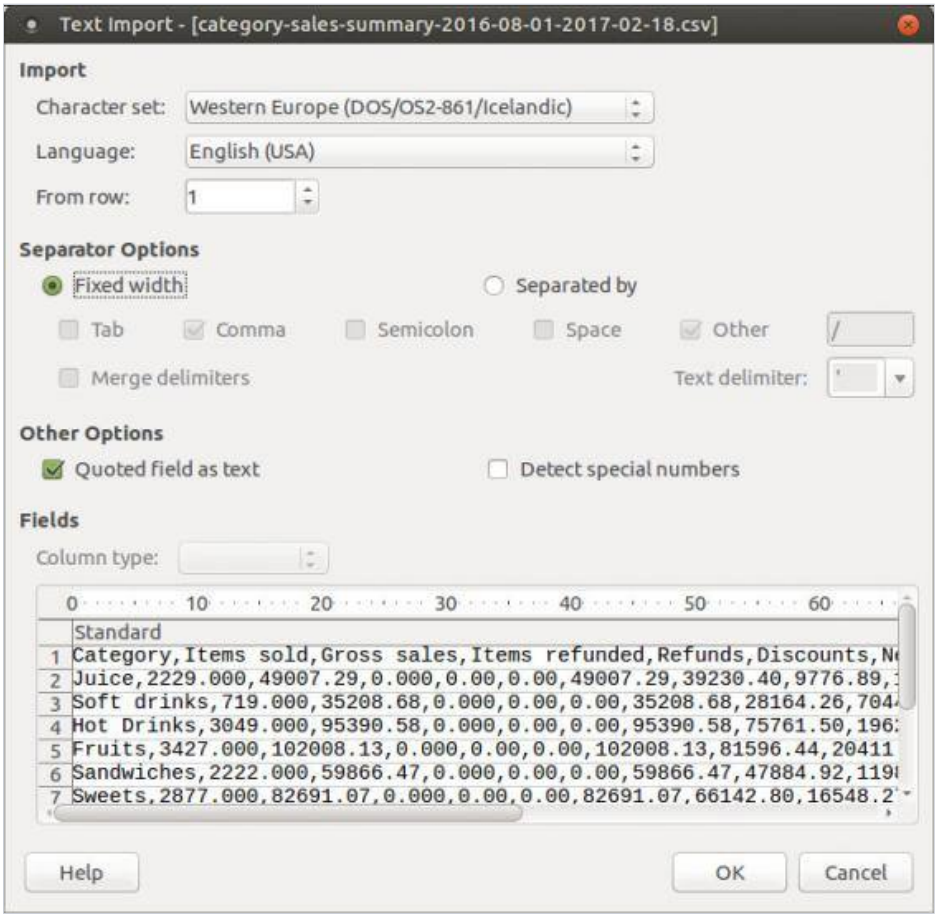
The report will be downloaded as a **CSV file**.

Opening the CSV File in LibreOffice Calc or OpenOffice Calc

Open **LibreOffice Calc** or **OpenOffice Calc**.

Go to **File → Open** (or press **Ctrl + O**) and select your CSV file.

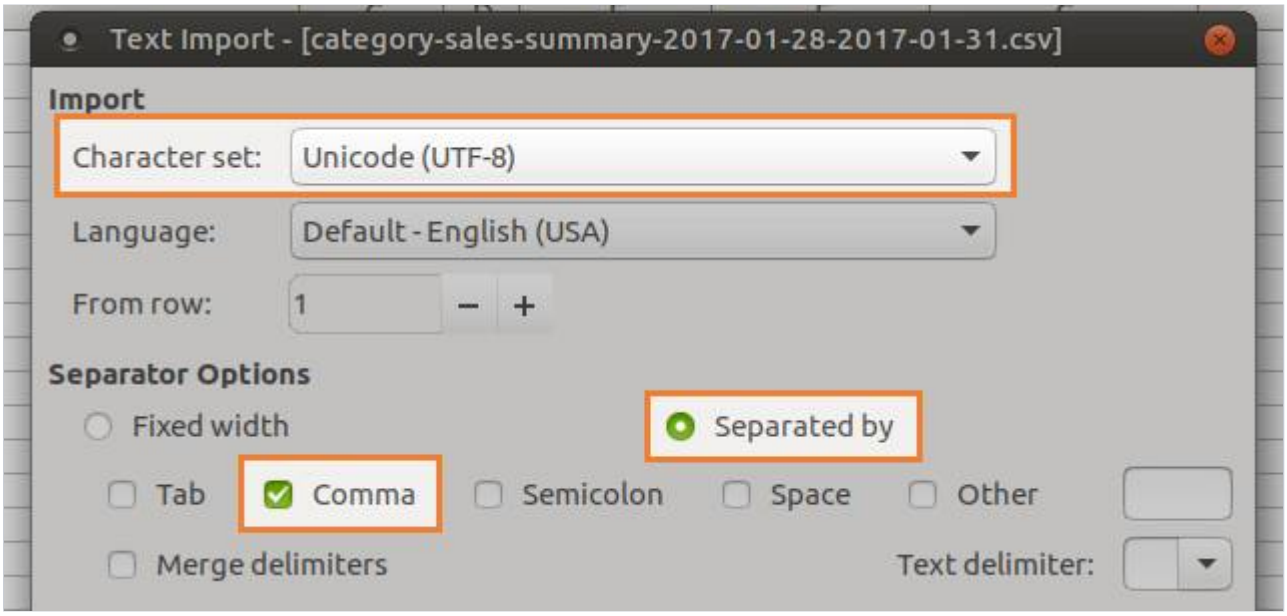
The **Text Import** window will appear.



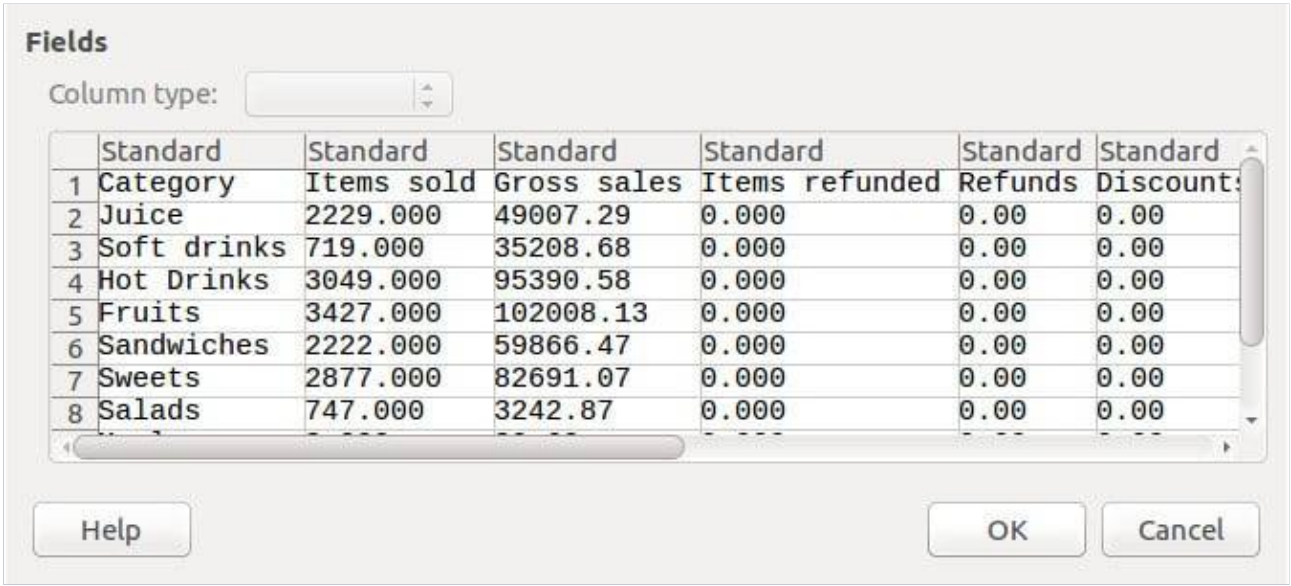
In the **Text Import** window, configure the following settings:

- **Character set:** select **Unicode (UTF-8)**

- **Separator options**:
  Select **Separated by**
  Check **Comma**



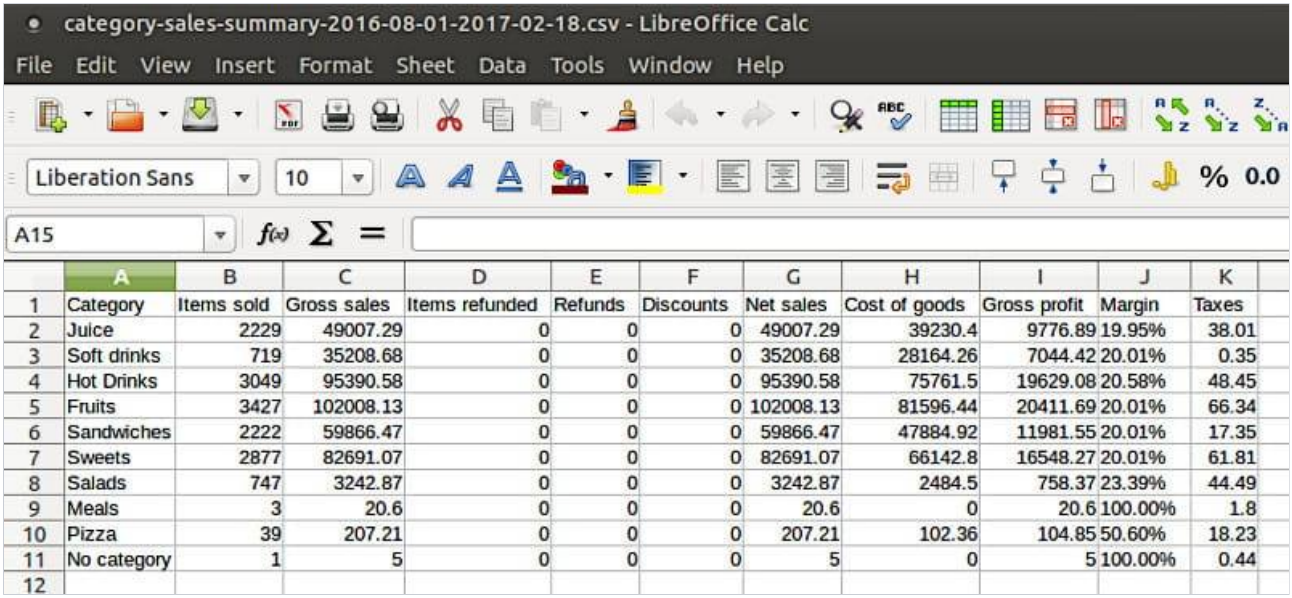
Once these options are selected, the preview window will display the data as a table.



	Standard	Standard	Standard	Standard	Standard	Standard
1	Category	Items sold	Gross sales	Items refunded	Refunds	Discount
2	Juice	2229.000	49007.29	0.000	0.00	0.00
3	Soft drinks	719.000	35208.68	0.000	0.00	0.00
4	Hot Drinks	3049.000	95390.58	0.000	0.00	0.00
5	Fruits	3427.000	102008.13	0.000	0.00	0.00
6	Sandwiches	2222.000	59866.47	0.000	0.00	0.00
7	Sweets	2877.000	82691.07	0.000	0.00	0.00
8	Salads	747.000	3242.87	0.000	0.00	0.00

Click **OK** to open the file.

The exported report will open as a spreadsheet, allowing you to view, analyze, and edit the data as needed.



	A	B	C	D	E	F	G	H	I	J	K
1	Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin	Taxes
2	Juice	2229	49007.29	0	0	0	49007.29	39230.4	9776.89	19.95%	38.01
3	Soft drinks	719	35208.68	0	0	0	35208.68	28164.26	7044.42	20.01%	0.35
4	Hot Drinks	3049	95390.58	0	0	0	95390.58	75761.5	19629.08	20.58%	48.45
5	Fruits	3427	102008.13	0	0	0	102008.13	81596.44	20411.69	20.01%	66.34
6	Sandwiches	2222	59866.47	0	0	0	59866.47	47884.92	11981.55	20.01%	17.35
7	Sweets	2877	82691.07	0	0	0	82691.07	66142.8	16548.27	20.01%	61.81
8	Salads	747	3242.87	0	0	0	3242.87	2484.5	758.37	23.39%	44.49
9	Meals	3	20.6	0	0	0	20.6	0	20.6	100.00%	1.8
10	Pizza	39	207.21	0	0	0	207.21	102.36	104.85	50.60%	18.23
11	No category	1	5	0	0	0	5	0	5	100.00%	0.44
12											

This method ensures correct data formatting and helps prevent issues with special characters or incorrect column separation.

See also:

How to Open CSV Files in Google Sheets

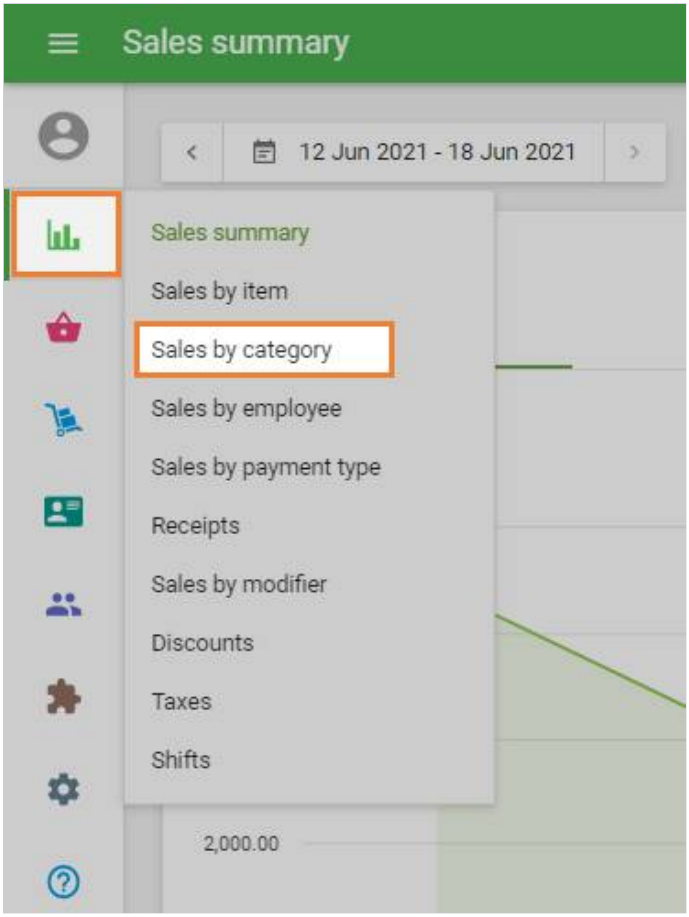
How to Export Data from Reports and Open in Excel

Loyverse allows you to export reports from the Back Office in CSV format, which can be easily opened in **Microsoft Excel** for viewing and analysis.

Exporting a Report from the Back Office

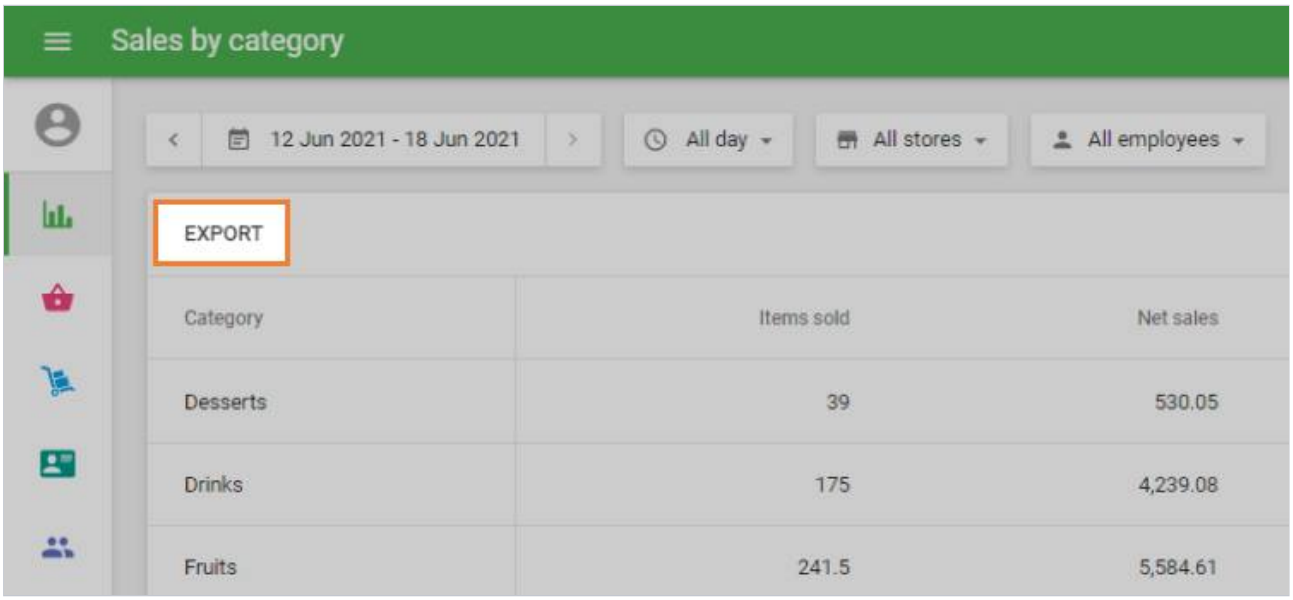
Log in to the **Back Office** and open the **Reports** section.

Select the report you want to export (for example, **Sales by category**).



Choose the required reporting period.

Click the **Export** button.



Enter a file name and save the file to your computer.

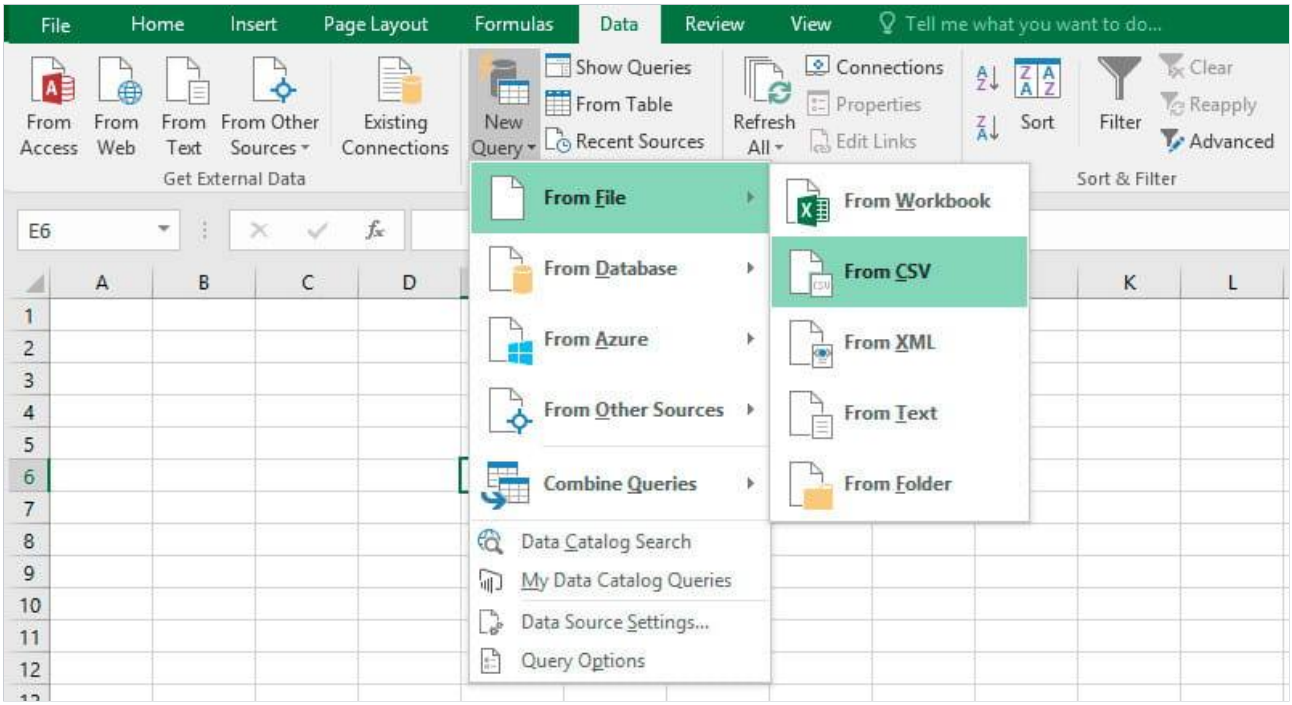
The report will be downloaded as a **CSV file**.

Opening the CSV File in Microsoft Excel

Open **Microsoft Excel**.

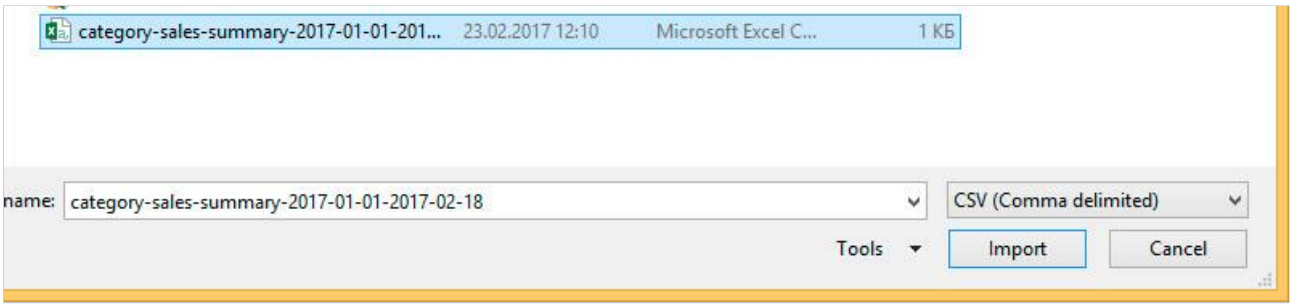


Go to the **Data** tab.



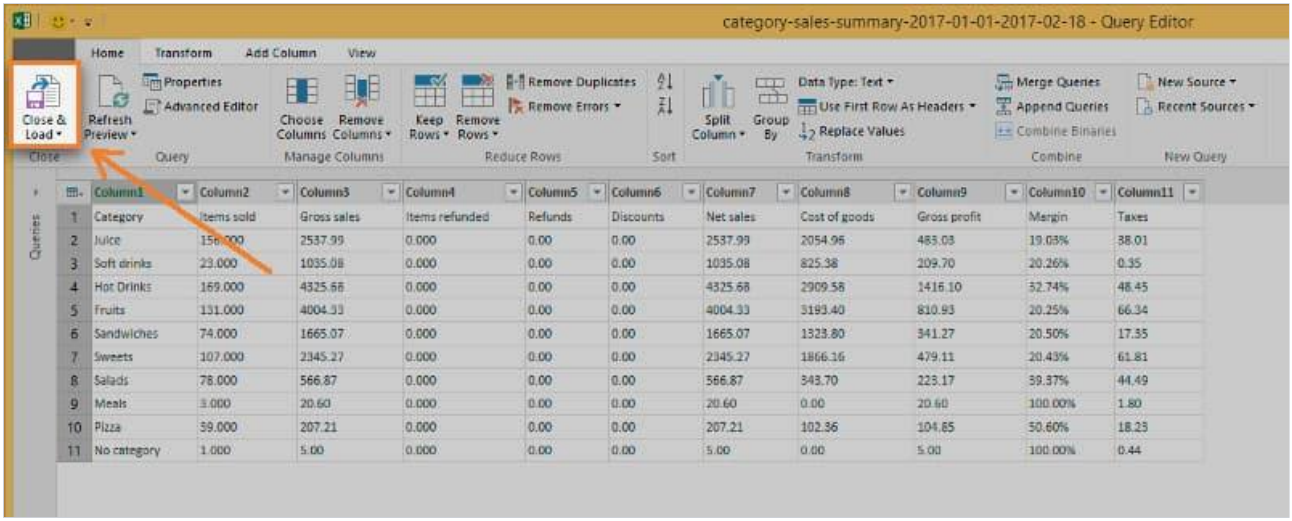
Click **Get Data → From File → From Text/CSV**
(in some Excel versions: **Data → New Query → From CSV**).

Select your CSV file and click **Import**.



Excel will open a preview window showing the data in a table format.

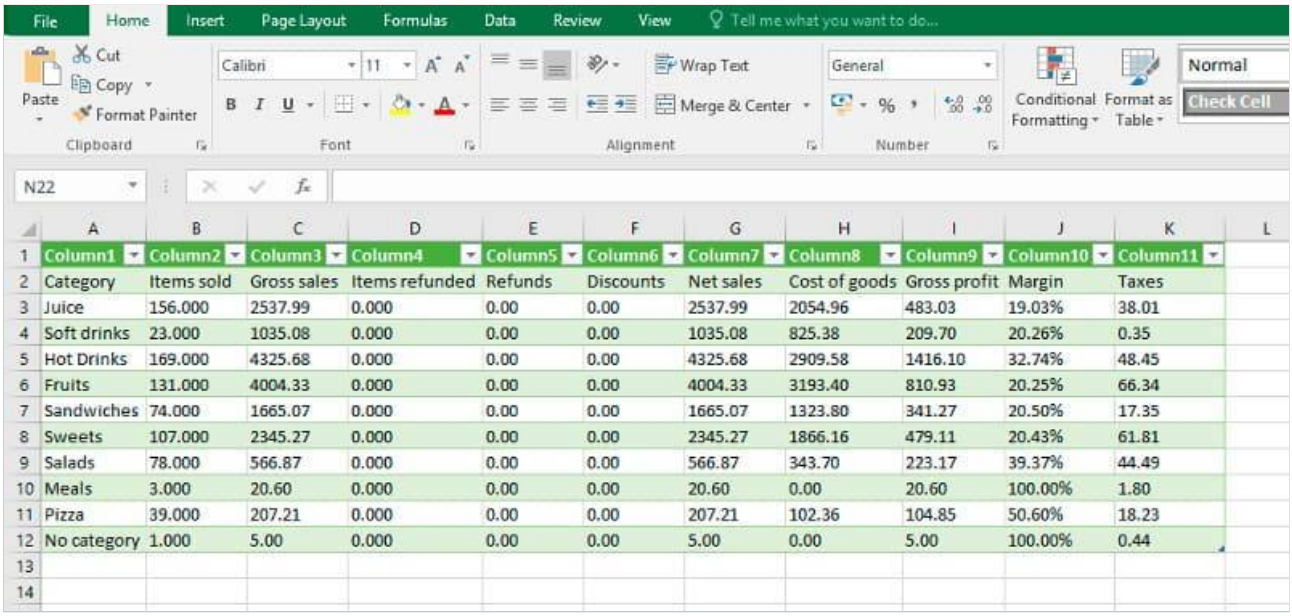
Click **Load** (or **Close & Load**) to open the file in a worksheet.



Result

Your exported report will open as a structured table in Excel, where you can:

- Sort and filter data
- Create charts and pivot tables
- Perform further analysis or editing



	A	B	C	D	E	F	G	H	I	J	K	L
1	Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11	
2	Category	Items sold	Gross sales	Items refunded	Refunds	Discounts	Net sales	Cost of goods	Gross profit	Margin	Taxes	
3	Juice	156.000	2537.99	0.000	0.00	0.00	2537.99	2054.96	483.03	19.03%	38.01	
4	Soft drinks	23.000	1035.08	0.000	0.00	0.00	1035.08	825.38	209.70	20.26%	0.35	
5	Hot Drinks	169.000	4325.68	0.000	0.00	0.00	4325.68	2909.58	1416.10	32.74%	48.45	
6	Fruits	131.000	4004.33	0.000	0.00	0.00	4004.33	3193.40	810.93	20.25%	66.34	
7	Sandwiches	74.000	1665.07	0.000	0.00	0.00	1665.07	1323.80	341.27	20.50%	17.35	
8	Sweets	107.000	2345.27	0.000	0.00	0.00	2345.27	1866.16	479.11	20.43%	61.81	
9	Salads	78.000	566.87	0.000	0.00	0.00	566.87	343.70	223.17	39.37%	44.49	
10	Meals	3.000	20.60	0.000	0.00	0.00	20.60	0.00	20.60	100.00%	1.80	
11	Pizza	39.000	207.21	0.000	0.00	0.00	207.21	102.36	104.85	50.60%	18.23	
12	No category	1.000	5.00	0.000	0.00	0.00	5.00	0.00	5.00	100.00%	0.44	
13												
14												

This method ensures that CSV data is imported correctly and displayed in separate columns.

See also:

[How to Open CSV Files in Google Sheets]

[How to Export Data from Reports and Open in LibreOffice Calc or OpenOffice]

Stock notifications

Negative Stock Alerts

Video
https://www.youtube.com/watch?v=RlhlPa3jONE

Negative stock alerts notify cashiers when there isn't enough stock available to complete a sale. This feature helps prevent inventory from going into negative values and gives you better control over stock levels.

Requirements

To receive negative stock alerts:

- The **Track stock** option must be enabled for the items.
- The **Negative stock alerts** feature must be turned on in the Back Office.

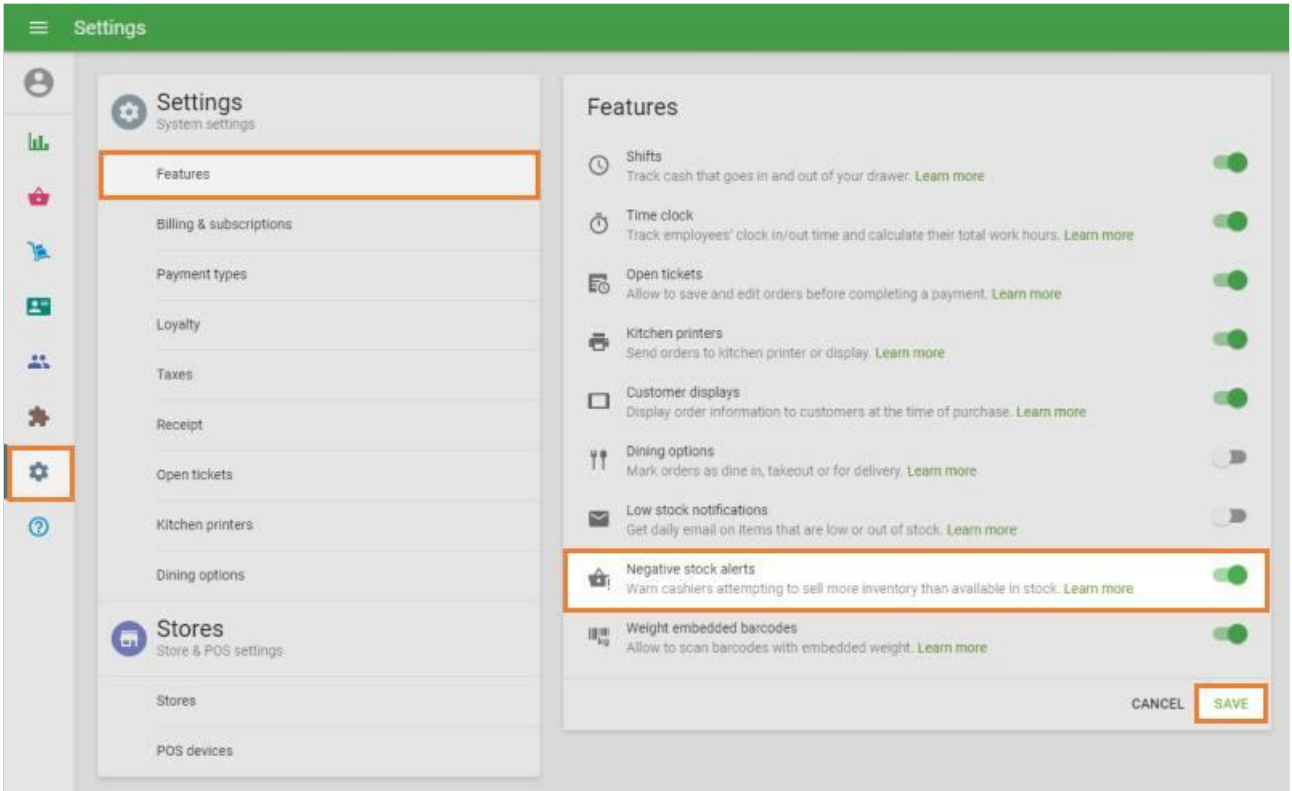
How to Enable Negative Stock Alerts

Log in to the **Back Office**.

Go to the **Settings** menu.

Open the **Features** section.

Turn on **Negative stock alerts**.



Click **Save**.

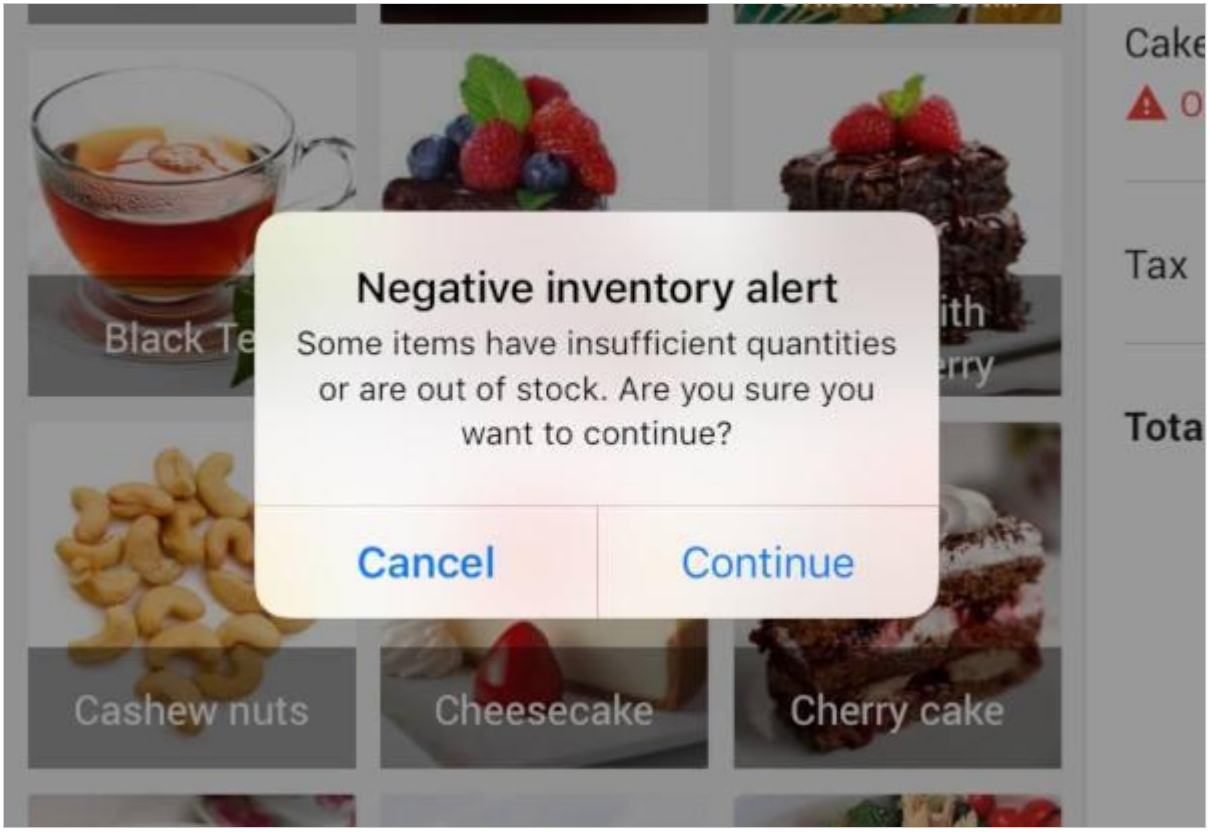
How Negative Stock Alerts Work

When this feature is enabled, the system displays a warning if a cashier tries to add a quantity of an item to the ticket that exceeds the available stock.

If the item has a stock quantity greater than 0, the alert will show how many units are still available for sale.

The warning appears both:

- When editing the quantity of an item already added to the ticket
- When tapping the **Charge** button before completing the sale



Alerts also apply to **composite items**, based on the availability of their components.

Cashiers can:

- Reduce the quantity of the item and tap **Save** if stock is still available, or
- Proceed with the sale by tapping **Continue**, even if the stock is insufficient.

Important Note

Negative stock alerts require an active internet connection. Warnings will not be displayed when the POS is working in offline mode.

See also:

Notification About Low Stock

POS Dashboard

Using Loyverse Dashboard

Video
https://www.youtube.com/watch?v=-HhwmTADj9c

Loyverse Dashboard App (Android, iOS) gives you instant access to your store's most valuable data. Complementing the Loyverse POS app, it puts key real-time information about your business at your fingertips allowing you to make important decisions immediately.

To start using POS Dashboard, sign in with the same email and password you use to access Loyverse POS Back Office.

What you see right away is today’s sales summary chart: the number of receipts, net sales figure, and the average ticket size. The chart also shows a comparison to the previous day’s data - this way you can quickly evaluate the two periods.



For more details just tap the chart to view sales breakdown.

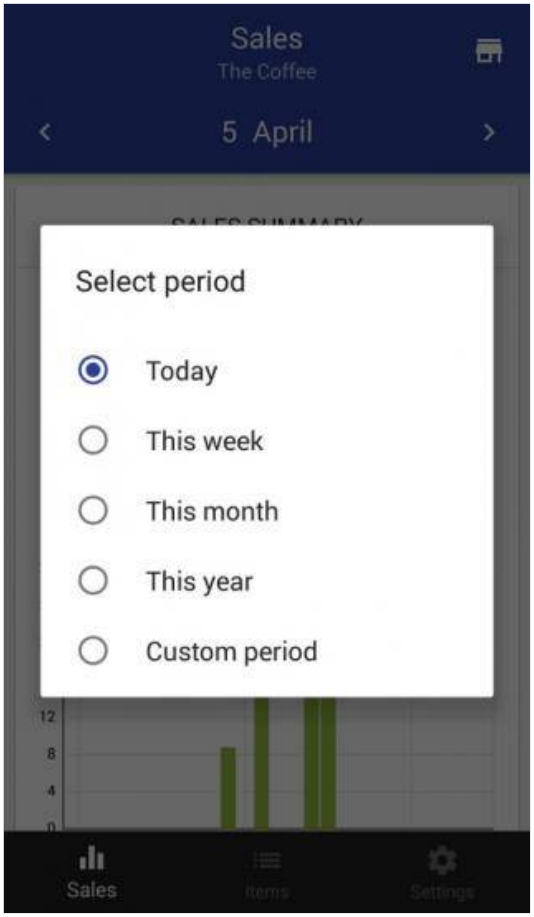


To return to the chart view, tap the Back arrow or Sales icon in the bottom menu.

You can navigate back and forth in time by tapping the arrows left and right of the date.



When you'd like to analyze a longer period, tap the date and select this week, month, or even an entire year.



If you want to set a custom time period, use the calendar and tap the beginning and ending dates.
Depending on the selected time period, the sales bar chart will show data broken down by an hour, day, or month.

If you want to analyze your sales for some particular period during each day, click “Custom period” and turn off the toggle “All day”.



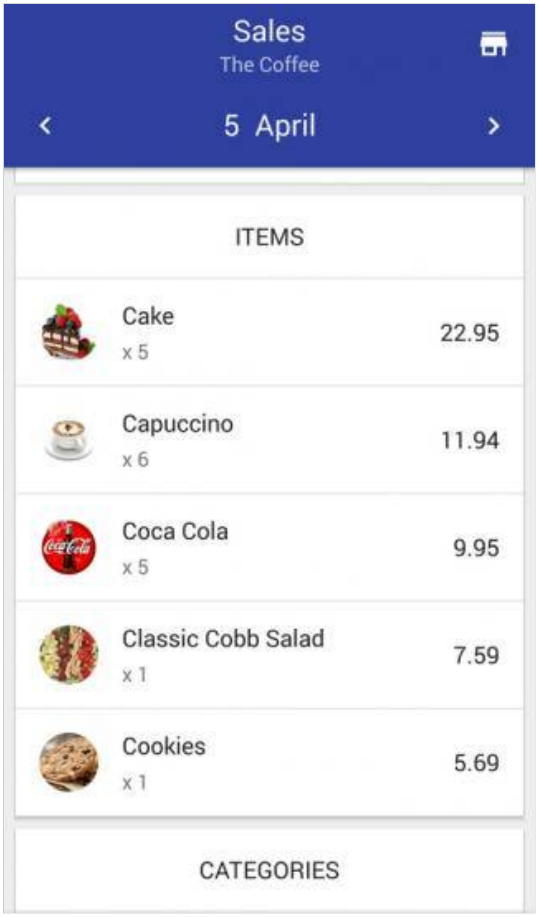
Then set the start and end times of the day you need.



Click the “Apply” button.

Pinch the bar chart to change its scale or tap it to see the exact values for selected bars.

Scroll down to view your sales by items, categories, and employees.



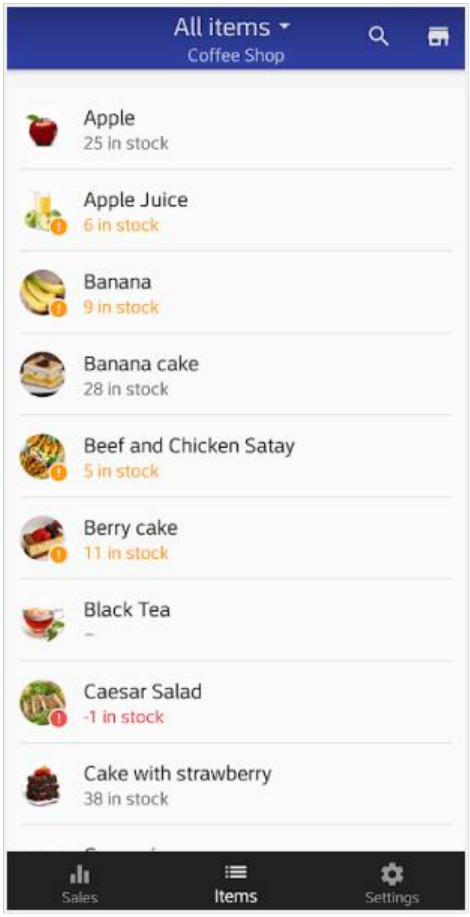
Again, if you want more details, tap the appropriate screen to drill down and tap the back arrow to return to the main screen. In each detailed view, it may be convenient to sort the list by tapping the sort arrow.

Stock Alerts

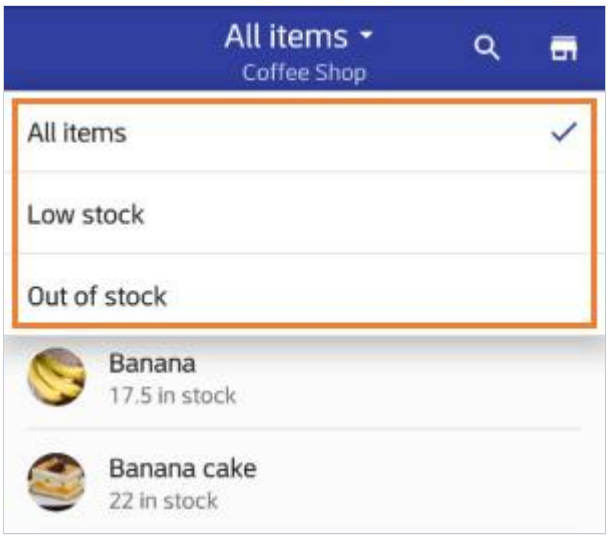
To keep on selling, you have to make sure your store carries sufficient stock. To check the stock status, switch to the Items tab.

Here you see items that are currently in stock, low on stock (yellow), or out of stock (red).

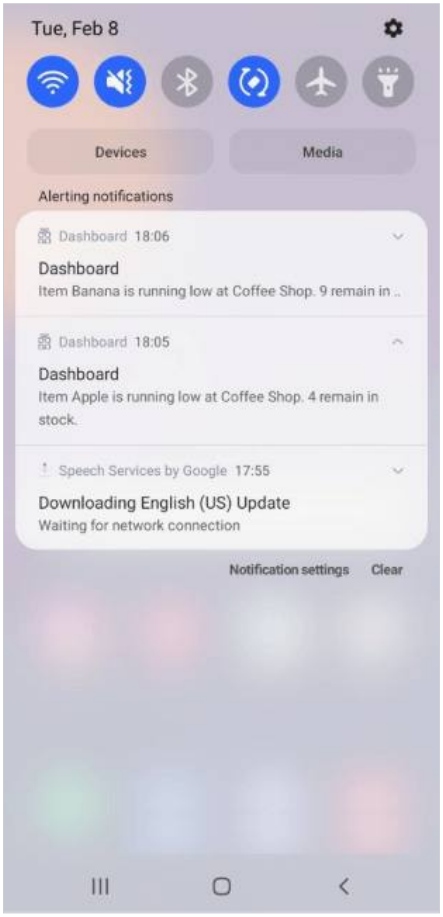
The symbol “-” near item means that the “Track stock” option for this item is off in the Back office.



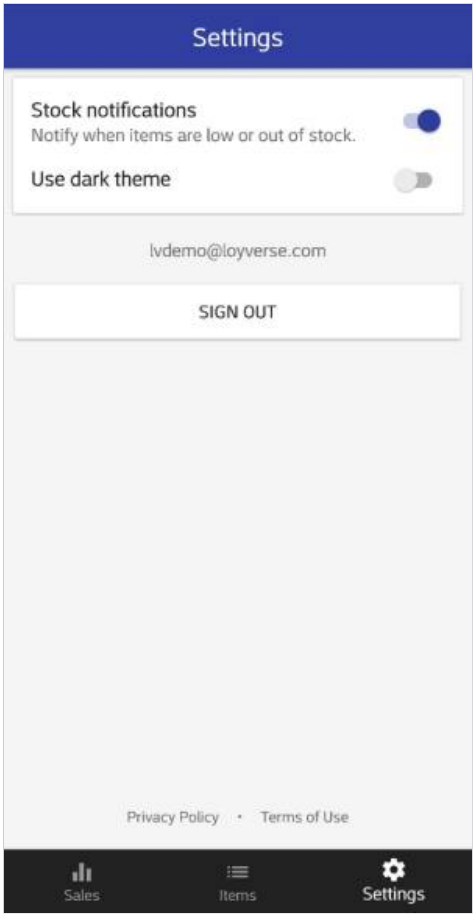
To refine the picture, you can use the filter to see only low-stock or out-of-stock items.



Whenever a sale is made, and the stock gets depleted, you will receive a push notification.

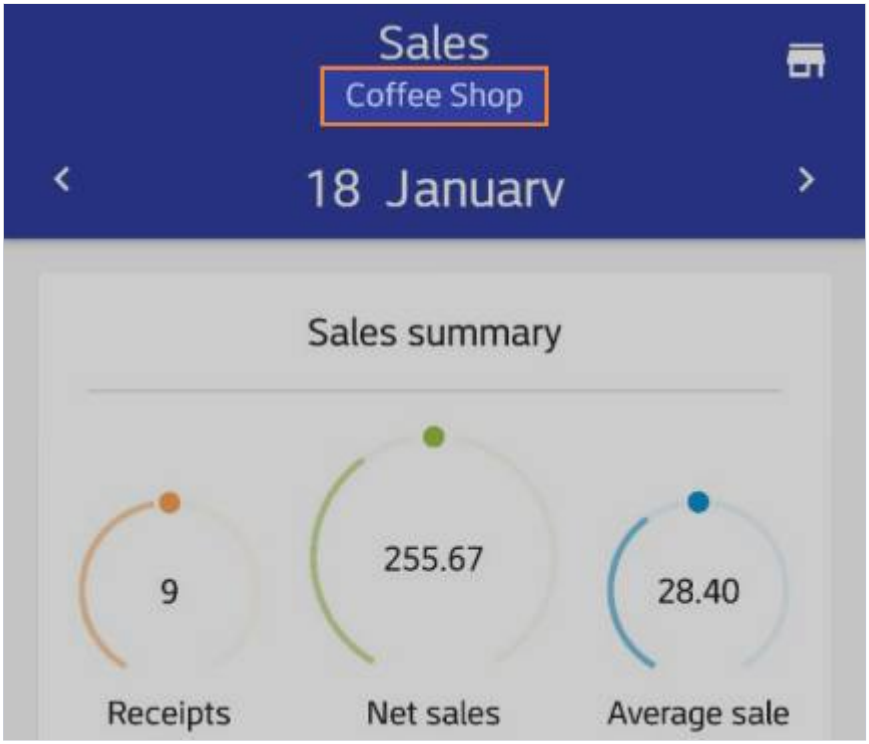


If you don’t like to receive instant stock alerts, turn this feature off in the Settings tab.

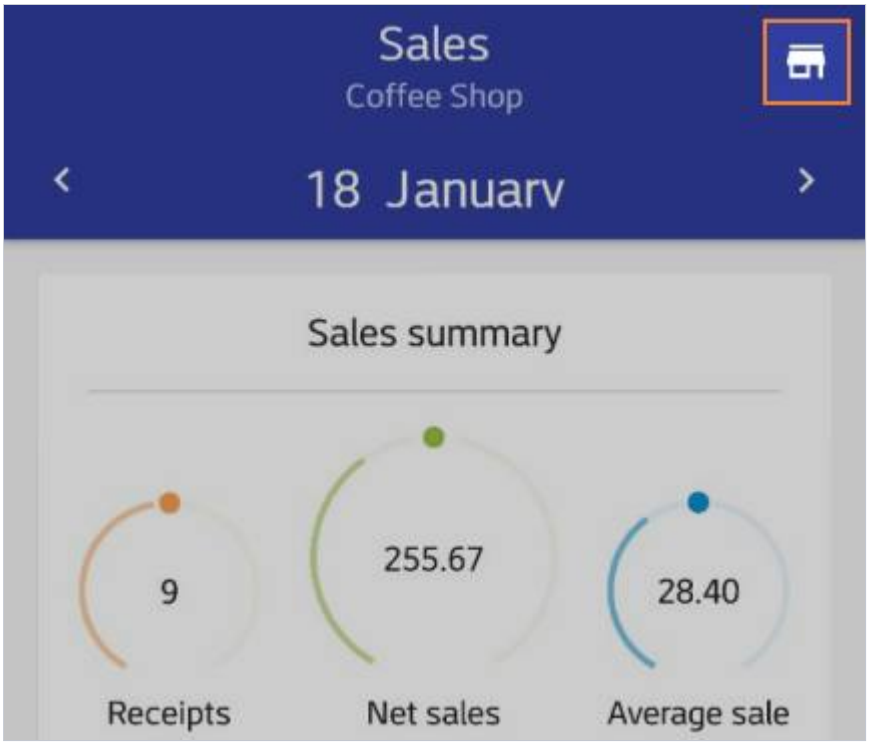


In order to use the dark theme, turn the “Use dark theme” toggle on.

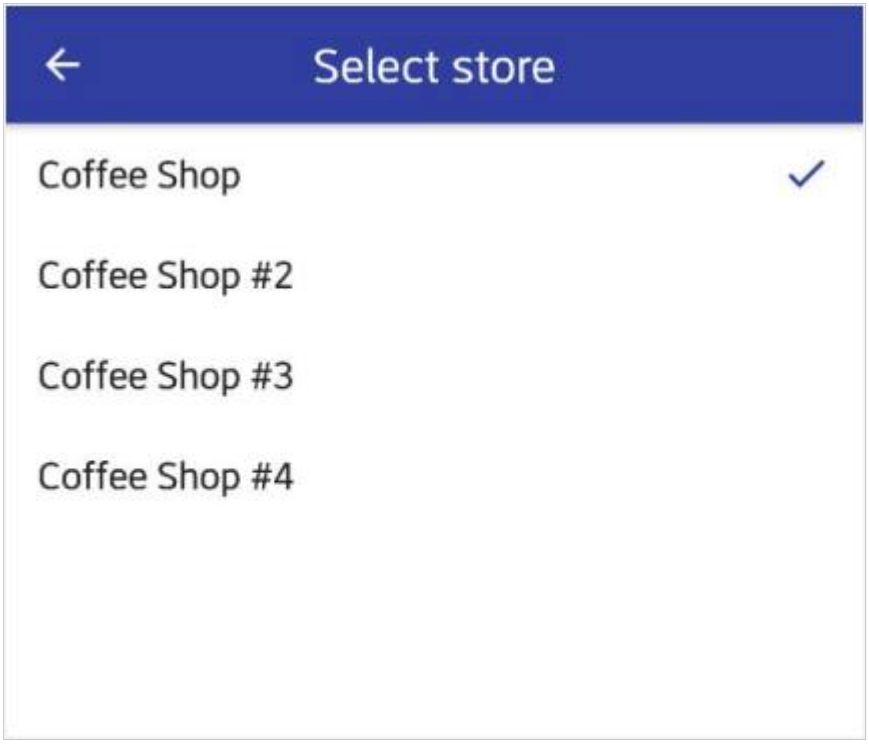
If you have more than one store you will see the name of the current store at the top of the main screen.



In order to see the information from a different store, click the “Store” icon at the top right of the screen.



You will see the list of all your stores from which you can choose the needed one.



Note: Access rights to "View sales reports" and/or "Manage items" in the Back Office section are needed for the employee to have the "Sales" section and/or "Items" section in the Loyverse Dashboard app.

Shift Report with Sales Summary at the POS

Video
https://www.youtube.com/watch?v=fXiwgHI8VJQ

You can view and print shift reports in the Loyverse POS app when the Shifts feature is enabled in the Back Office.

Requirements

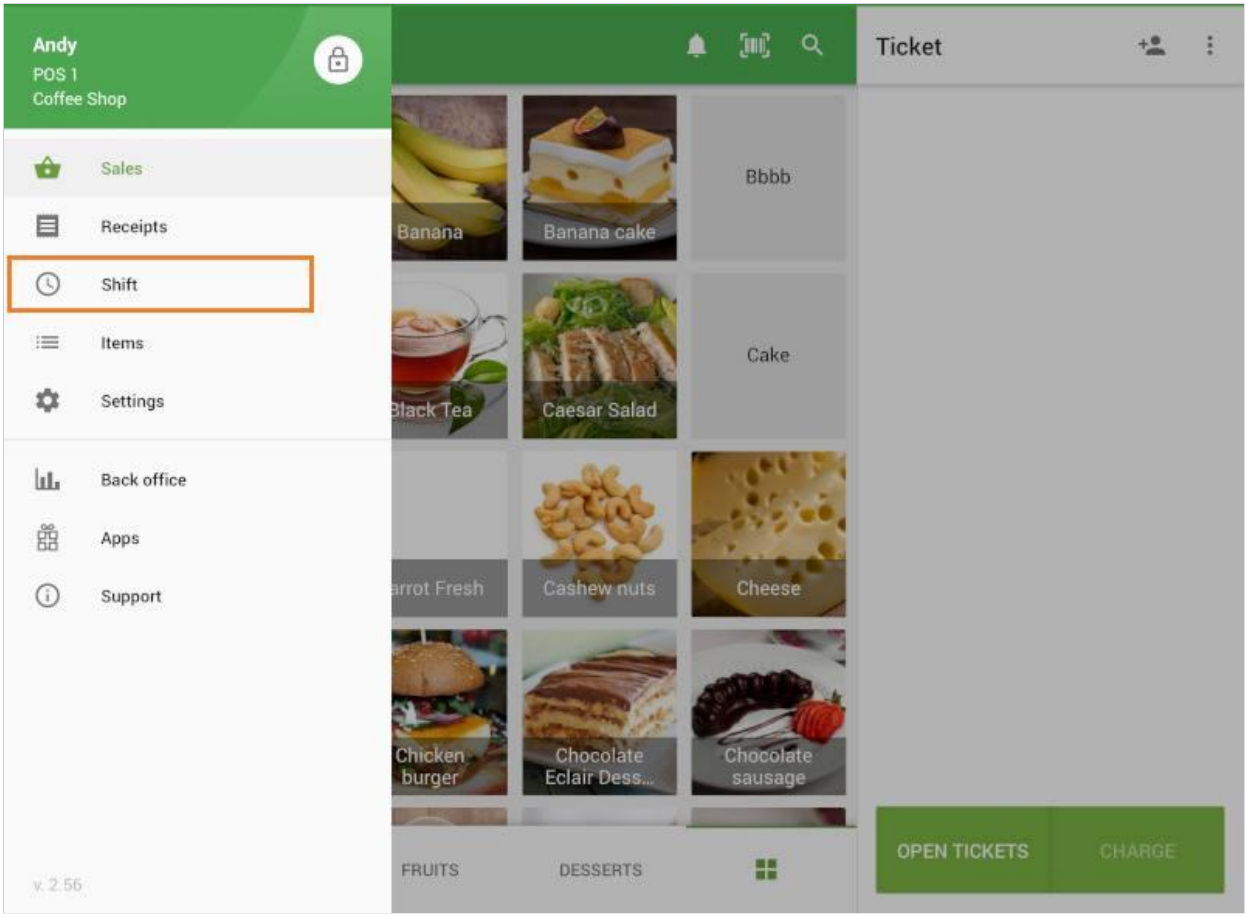
- The **Shifts** option must be enabled in **Back Office → Settings → Features**.
- At least one receipt printer must be connected in the POS app and configured to print receipts and bills.

Viewing the Current Shift Report (X-Report)

To access the report for the current (open) shift:

Open the Loyverse POS app.

Tap the ☰ **Menu** button and select **Shift**.



The **current shift report (X-report)** shows:

- Cash drawer information
- Current sales summary for the ongoing shift

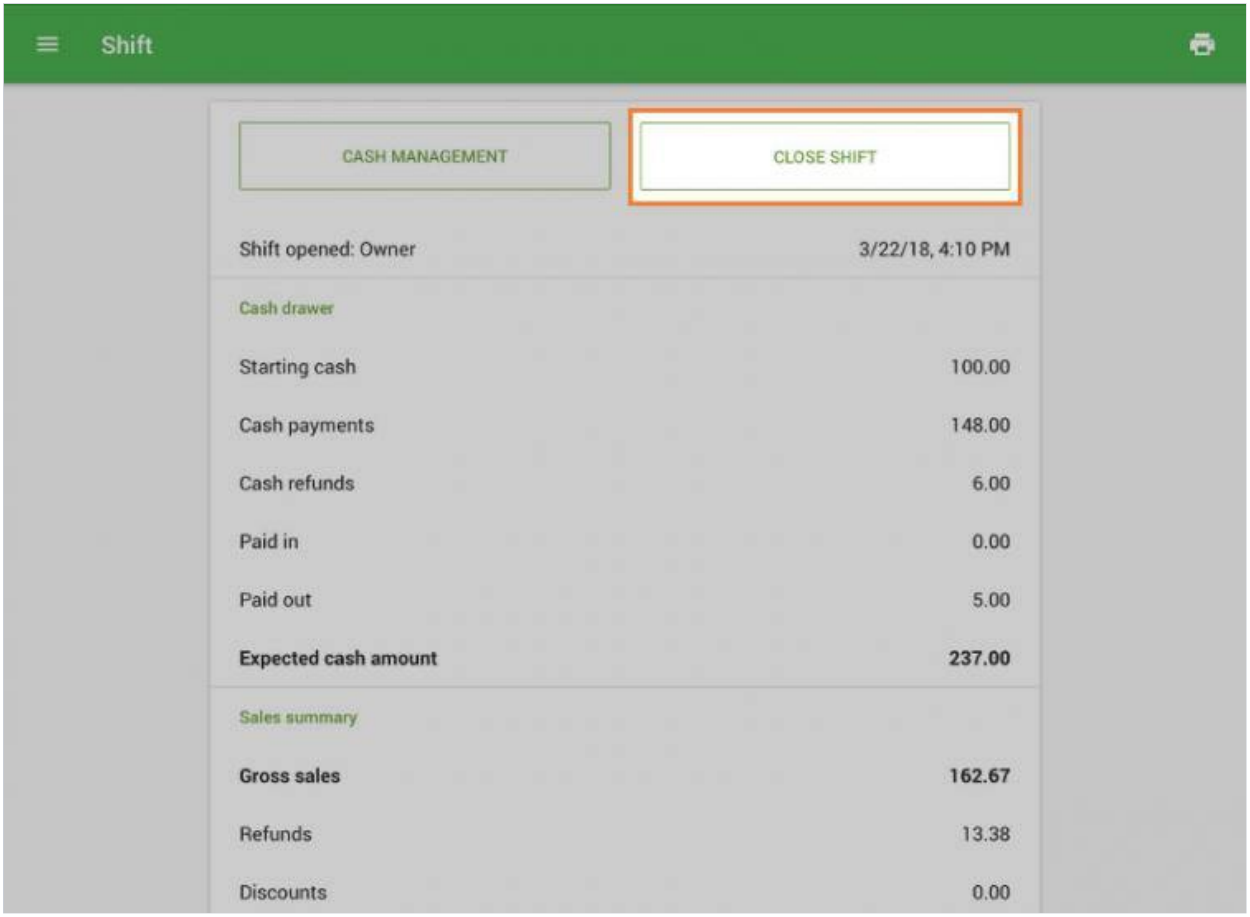
To print this report, tap the **Print** icon. Printing a report does not close the shift.

Closing the Shift and Printing the Final Report (Z-Report)

To view and print the closed shift report:

Open the **Shift** menu in the POS app.

Tap **Close shift**.



The **closed shift report (Z-report)** includes:

- Cash drawer totals at the end of the shift
- Sales summary for the entire shift
- Expected cash amount (calculated from sales, refunds, and cash paid in/out)
- Actual cash amount entered by the cashier
- Difference between expected and actual cash amounts

If the employee has the required access rights, the **Expected cash amount** will be visible.



Enter the **Actual cash amount** counted in the cash drawer and tap **Close shift** to complete the process.

After the shift is closed, the **Z-report** will be automatically printed on the connected receipt printer.



Shift report

Store: Shop 2
POS: POS 2

Shift opened: Owner	3/22/18, 4:10 PM
Shift closed: Owner	3/22/18, 4:15 PM

Cash drawer

Starting cash	100.00
Cash payments	148.00
Cash refunds	6.00
Paid in	0.00
Paid out	5.00
Expected cash amount	237.00
Actual cash amount	237.00
Difference	-

Sales summary

Gross sales	**162.67**
Refunds	13.38
Discounts	0.00
Net sales	**149.29**
Cash	142.00
Cash rounding	-0.82
Card	7.49

3/22/18, 4:15 PM

This report helps ensure accurate cash control and provides a clear summary of sales activity for each shift.

See also:

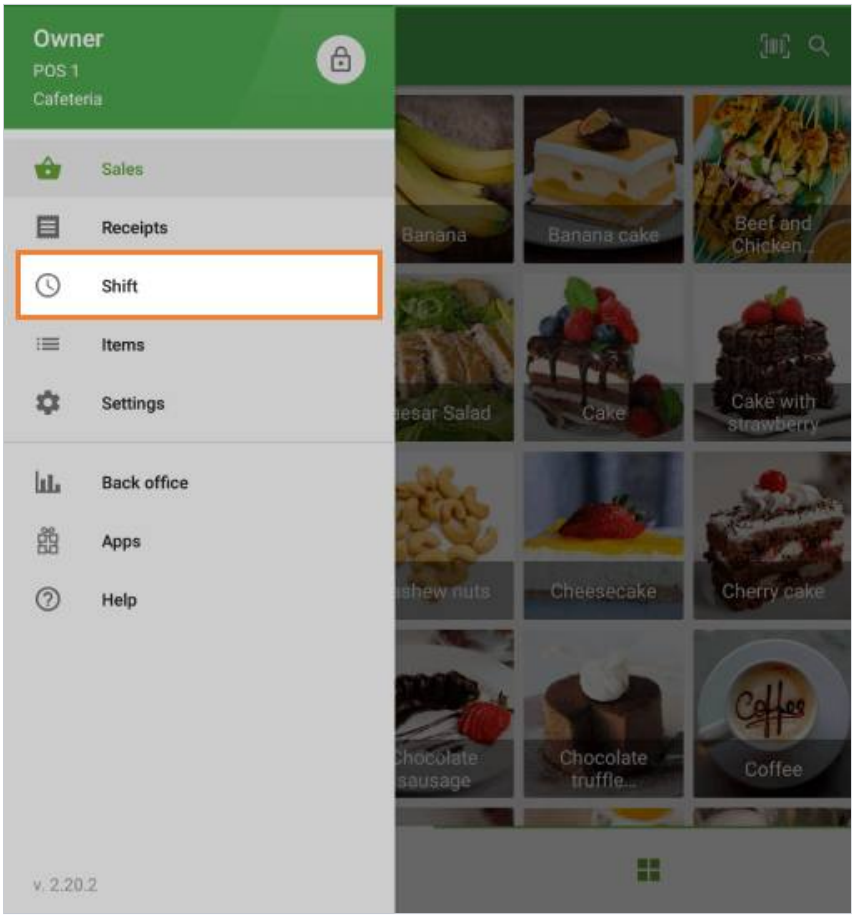
How to Work with Shift History in the POS

You can view past shifts directly in the Loyverse POS app using the **Shift history** feature.

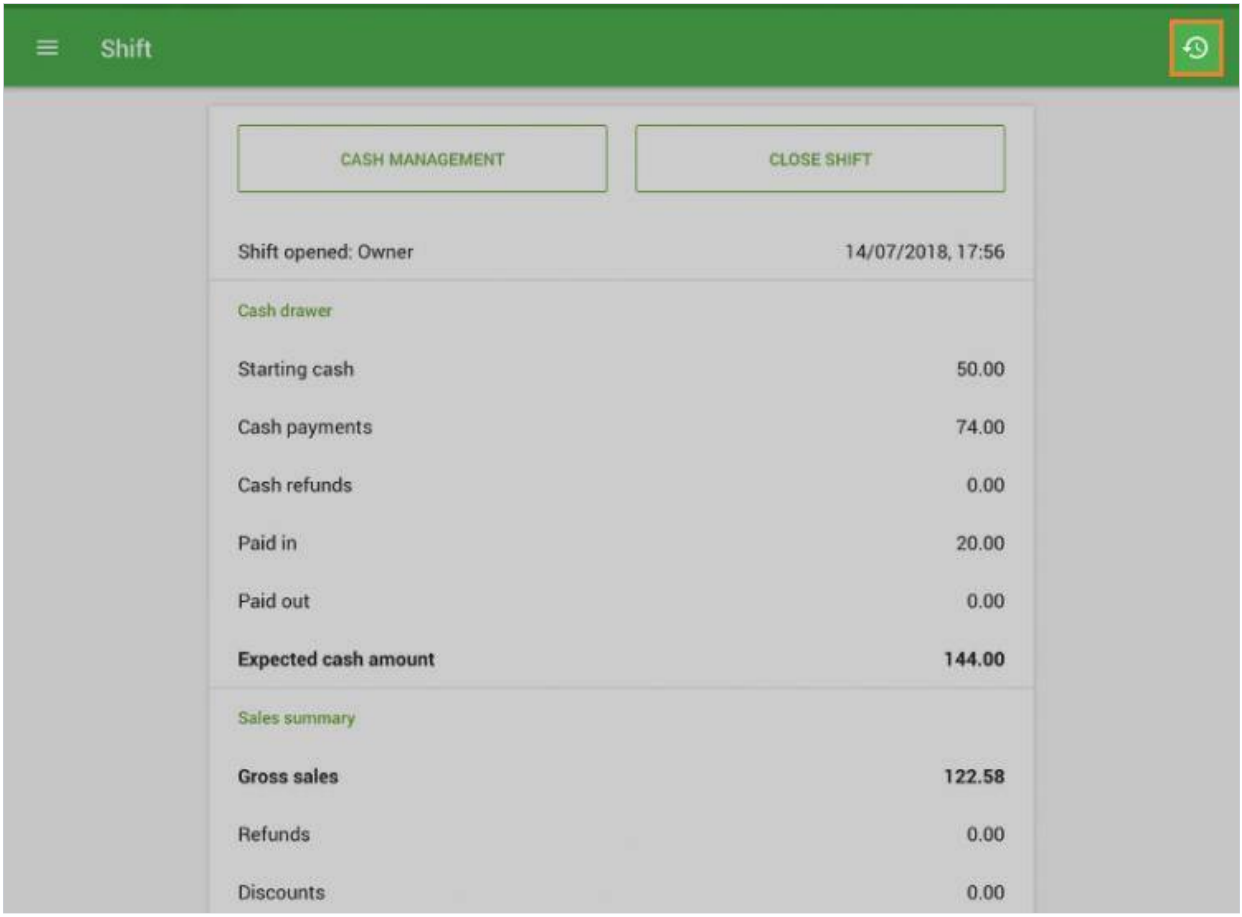
Accessing Shift History

Open the **Loyverse POS app**.

Tap the **Shift** button in the main menu.



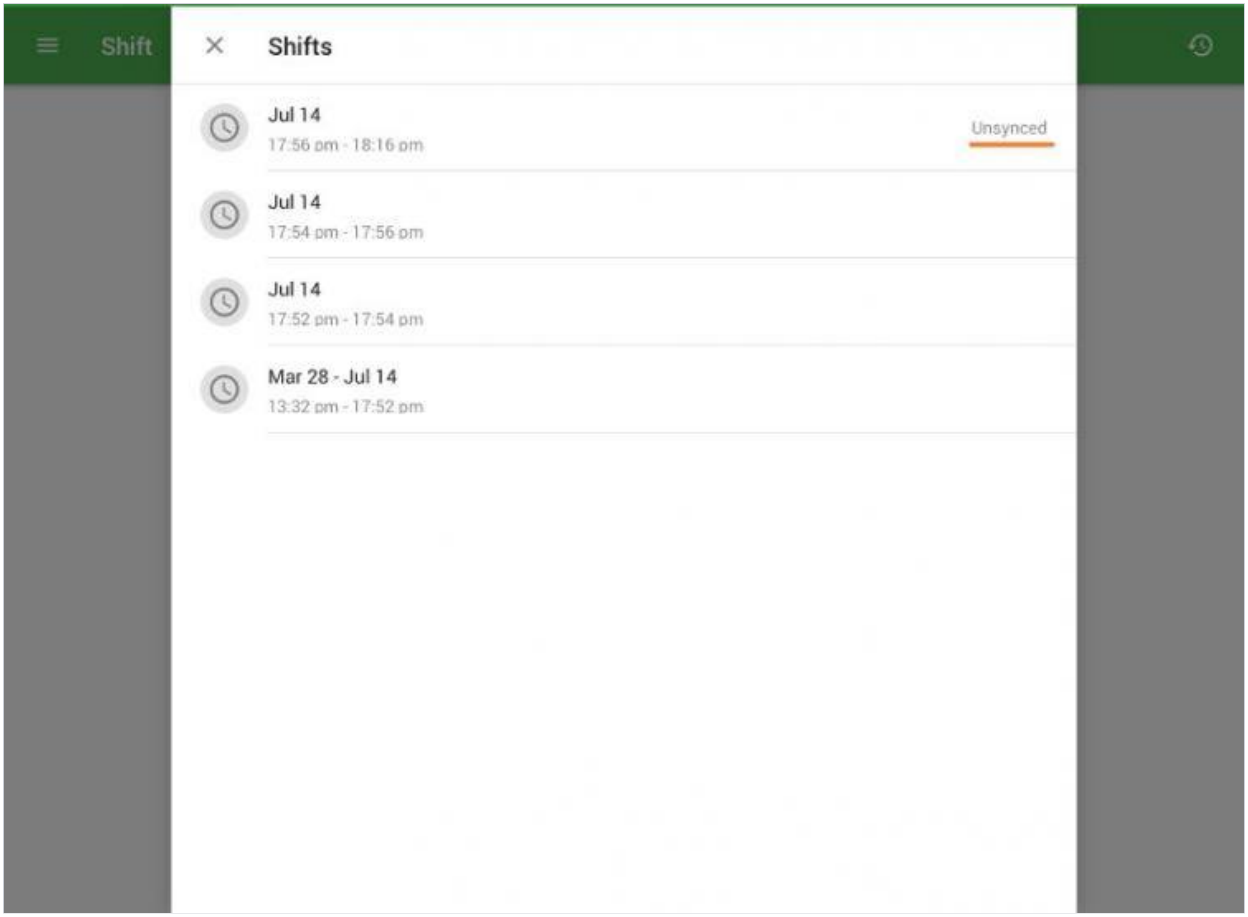
The report for the **current shift** will be displayed.



Tap the **History** icon to open the list of previous shifts.

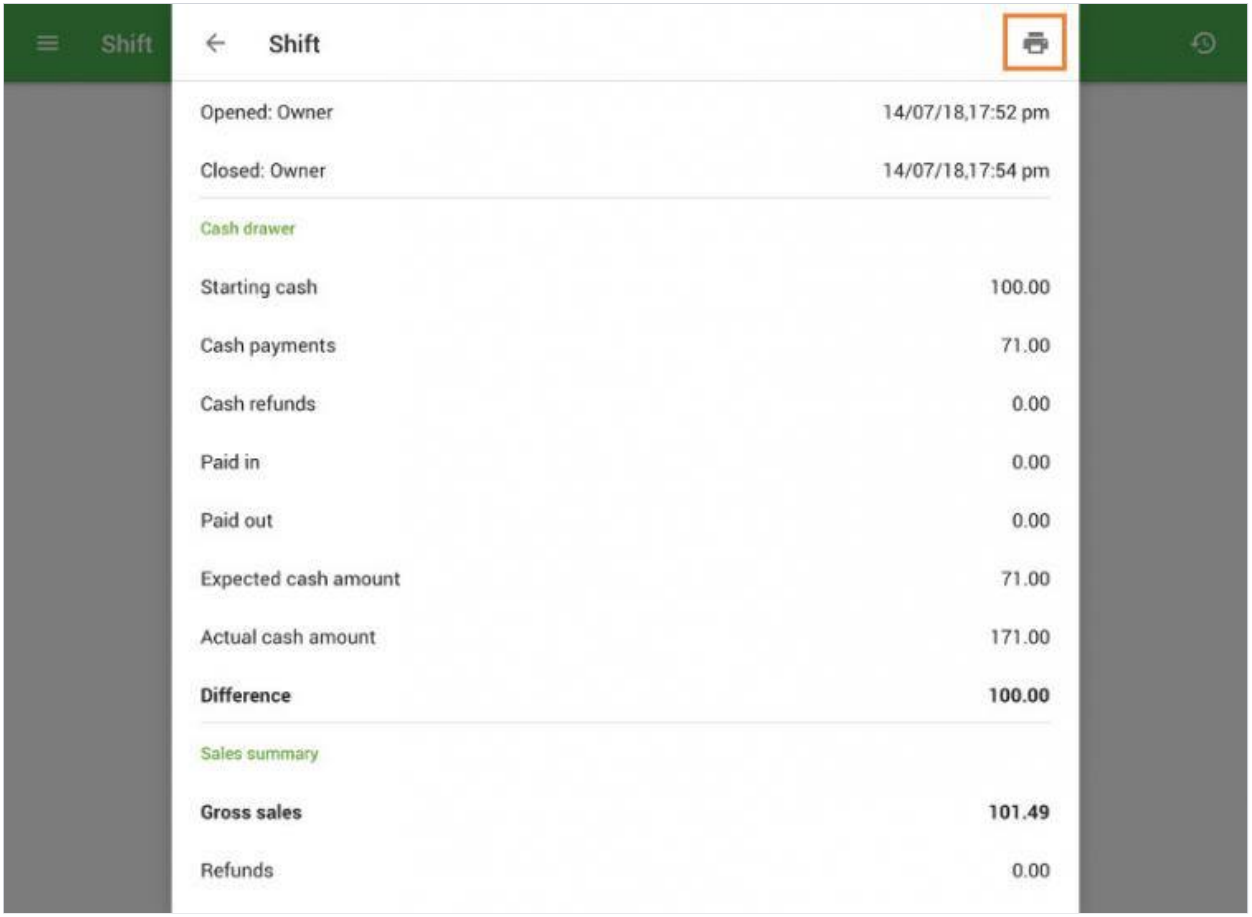
Viewing Shift Details

The shift history list shows only the shifts created on the **current POS device**.



If a shift contains events that have not yet been synchronized (such as shift opening, closing, pay-ins, or payouts), it will be marked as **Unsynced**.

Tap any shift in the list to view its detailed report.
To print the shift report, tap the **Print** icon (a receipt printer must be configured in the POS app).



Access Rights

Viewing shift history is available only to employees who have the **View shift report** access right enabled.

See also:

Shift Report with Sales Summary at the POS

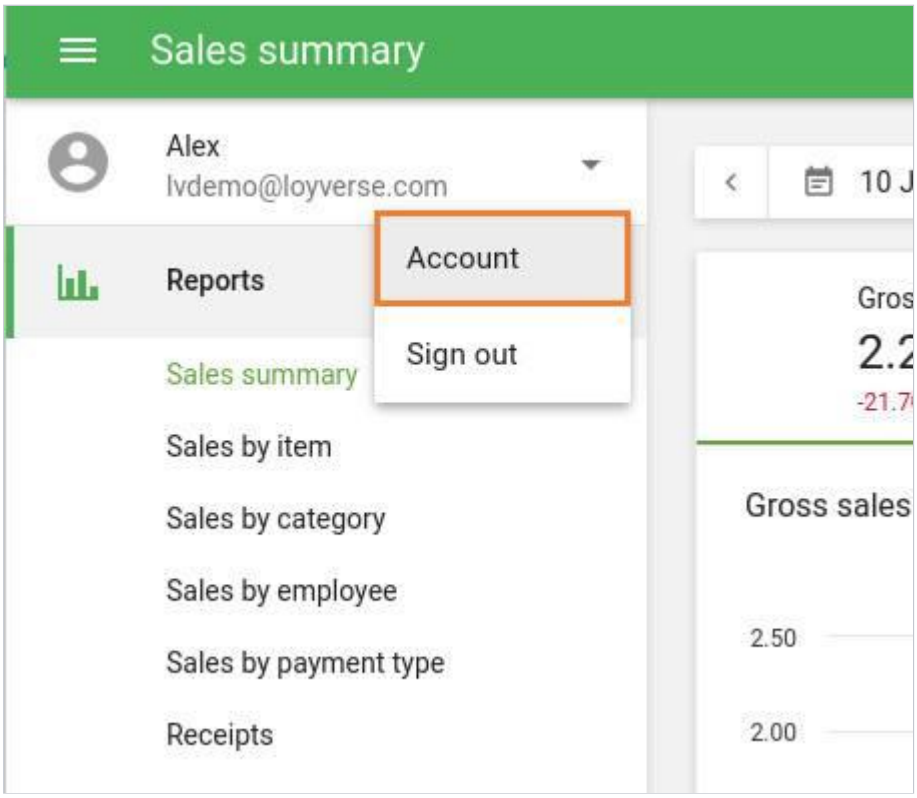
Settings

Account

How to Manage Account Settings in the Back Office

Every Loyverse user — both the owner and employees — with Back Office access has a personal account settings page.

To access it, click **Account** in the Back Office main menu.

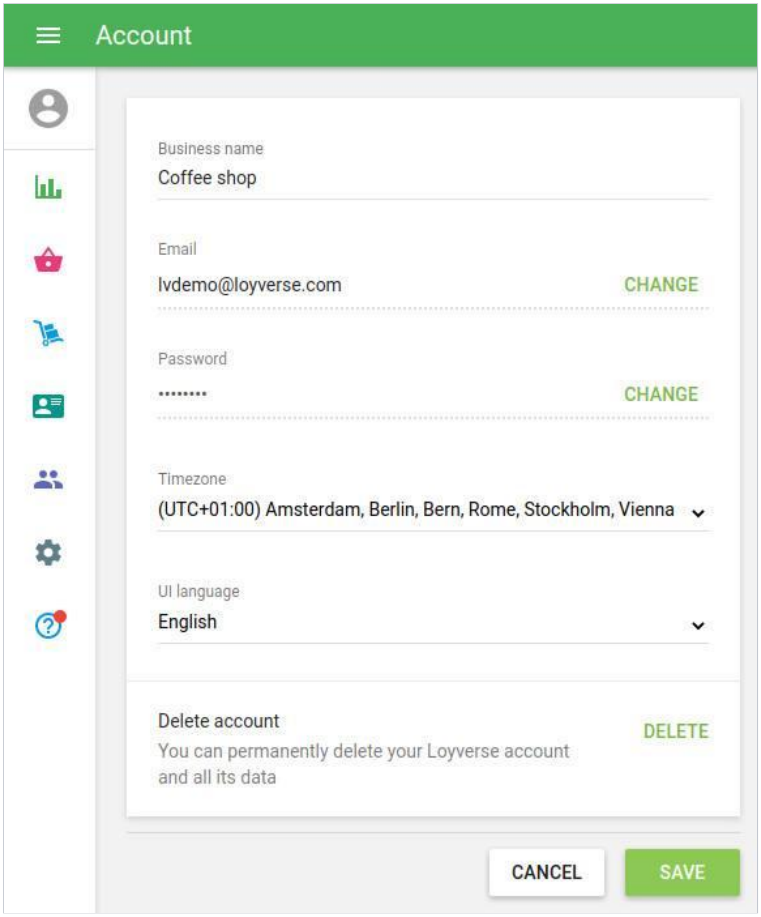


What You Can Change

All users can update the following settings:

- **Email** — The email address associated with the account.
- **Password** — The account login password.
- **Timezone** — Affects when low-stock notifications are sent. Each user can set their own timezone independently.
- **Interface Language** — Sets the Back Office display language for that user only. Changing this does not affect the language settings of other users on the same account.

Note: Changing your email or password requires password confirmation for security purposes.



The following options are available to the account owner only:

- **Business Name** — Update the name of the business.
- **Delete Account** — Permanently removes the account.

Warning: Deleting the account will permanently erase all sales data, account settings, and associated records (items, discounts, taxes, customers, etc.). It will also cancel all paid subscriptions and unsubscribe from all email newsletters. This action cannot be undone.

See also:

Setting Up Your Shop in Loyverse Back Office

How to Delete Loyverse Account

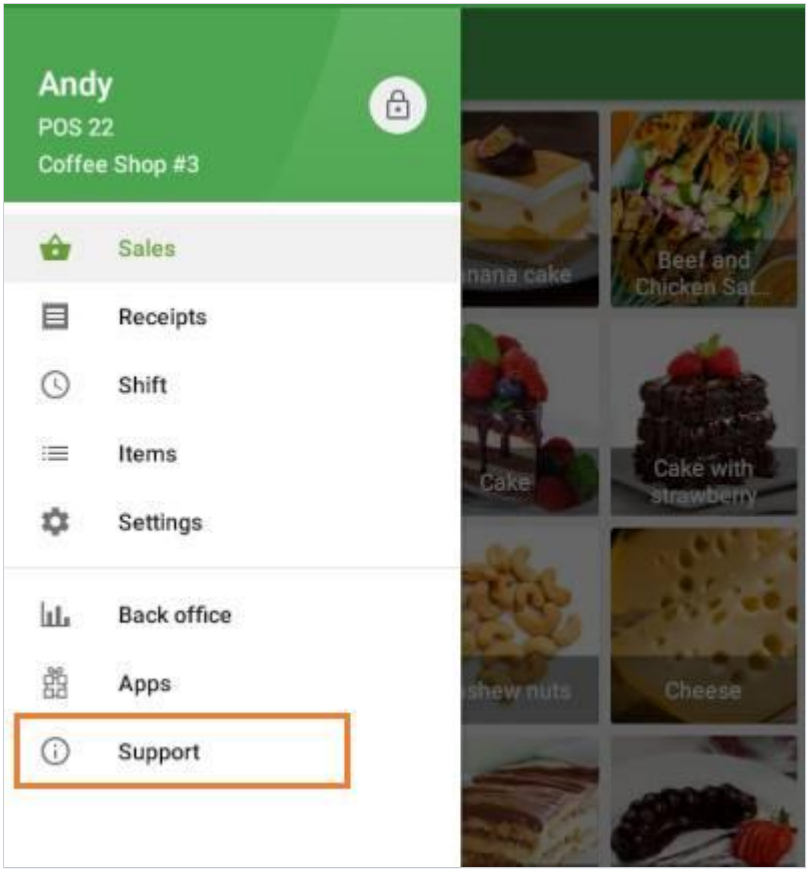
How to Delete the Loyverse Account

Only the **account owner** can delete a Loyverse account.

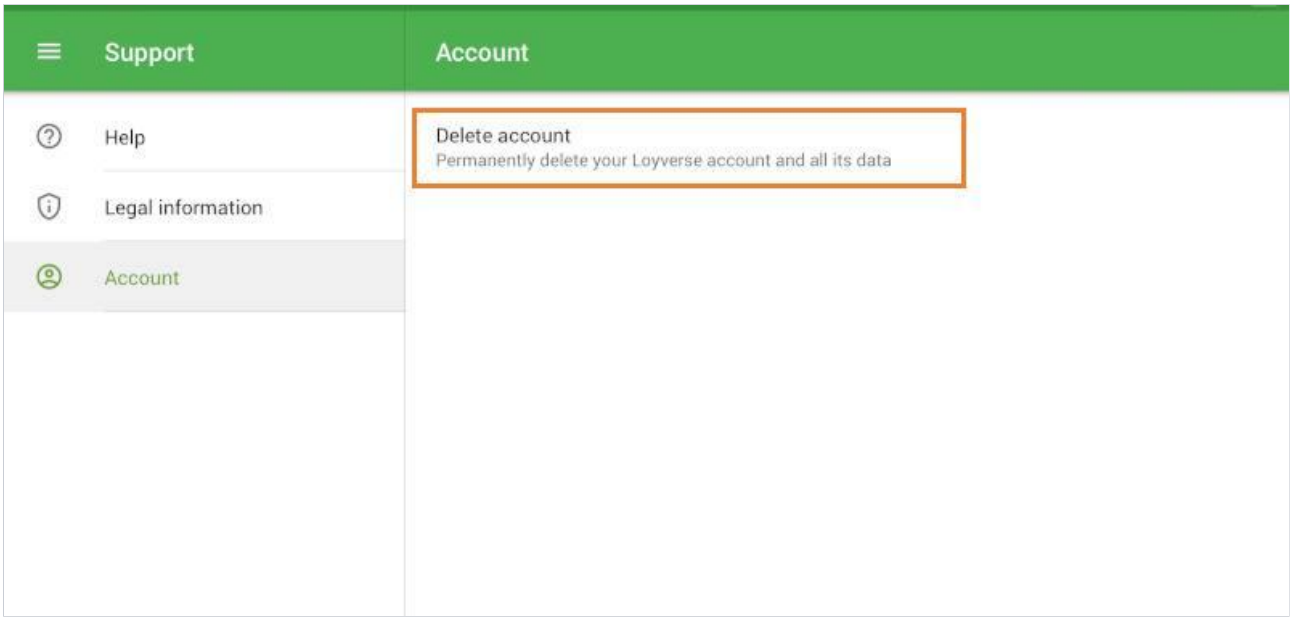
Deleting the Account from the Loyverse POS App

1. On your Android or iOS device, open the **Loyverse POS** app.

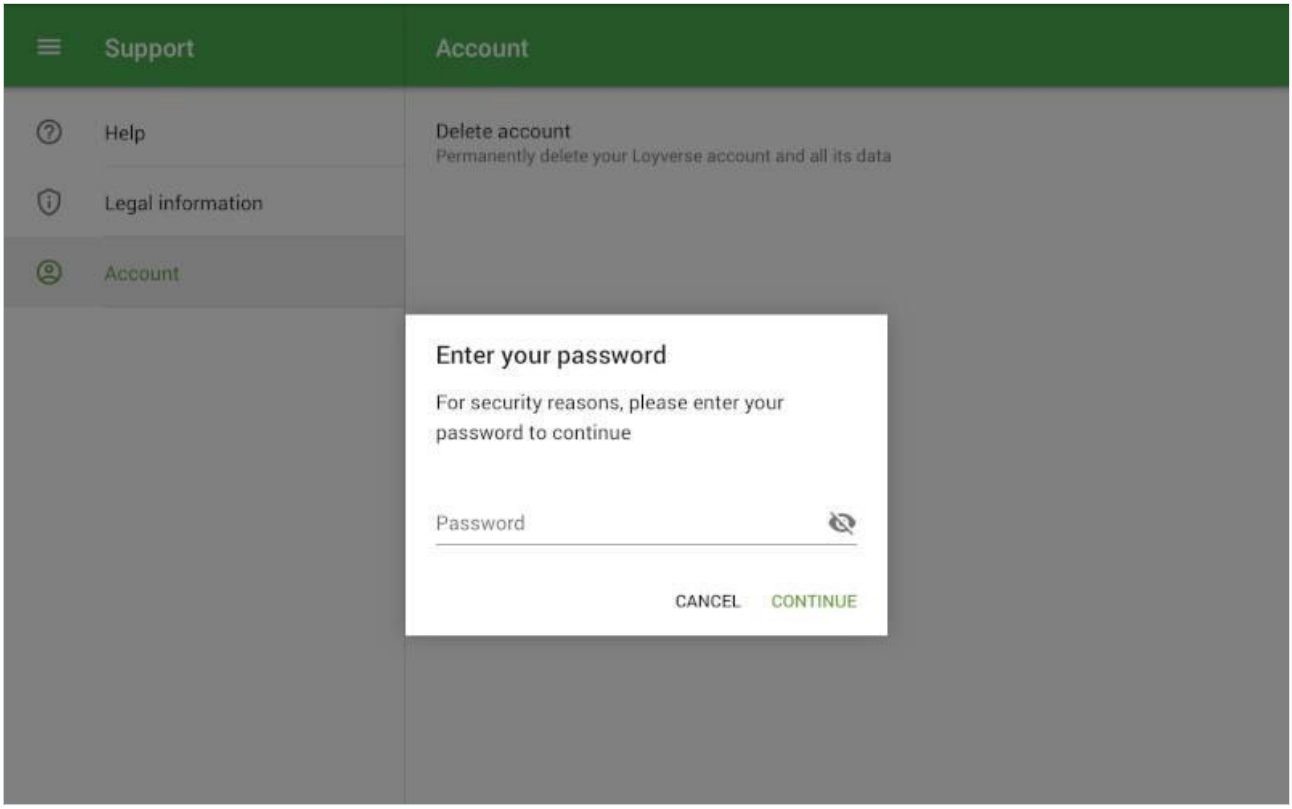
2. Go to the **Support** section.



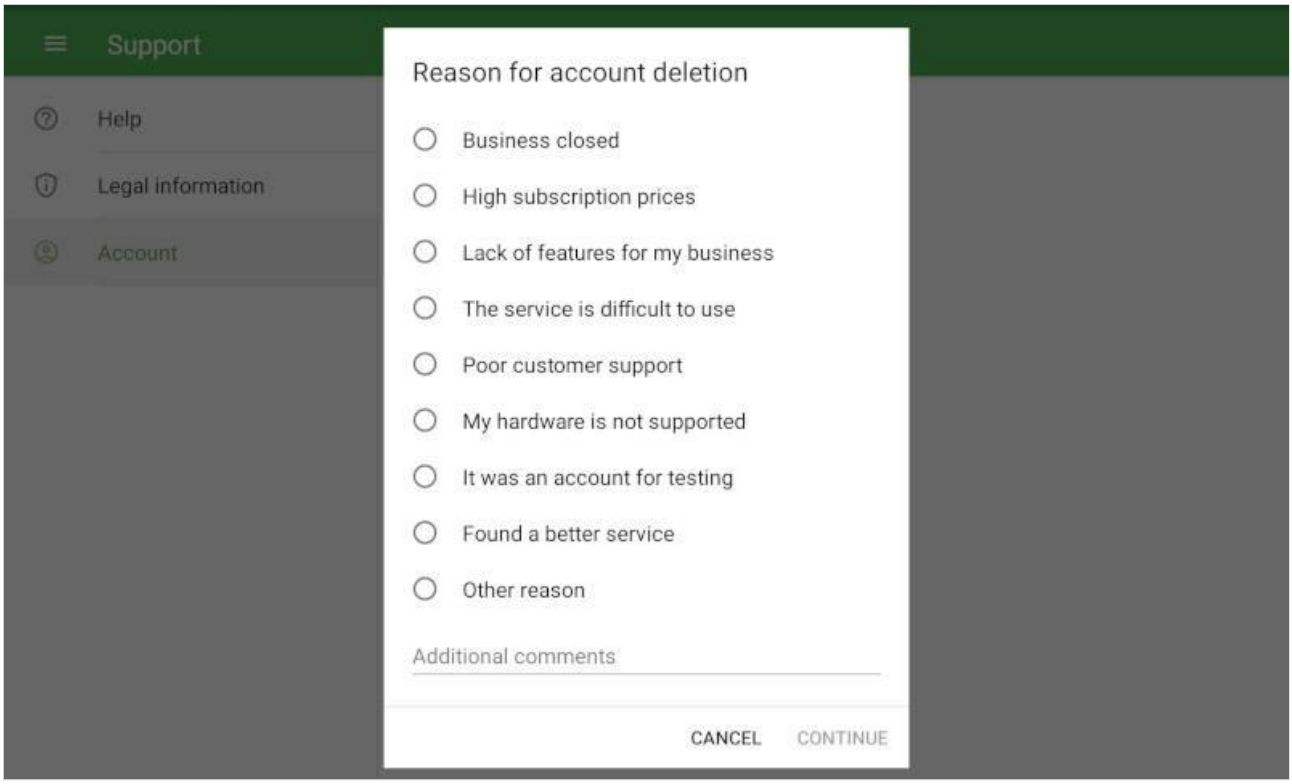
3. Select **Account** and tap '**Delete account**'.



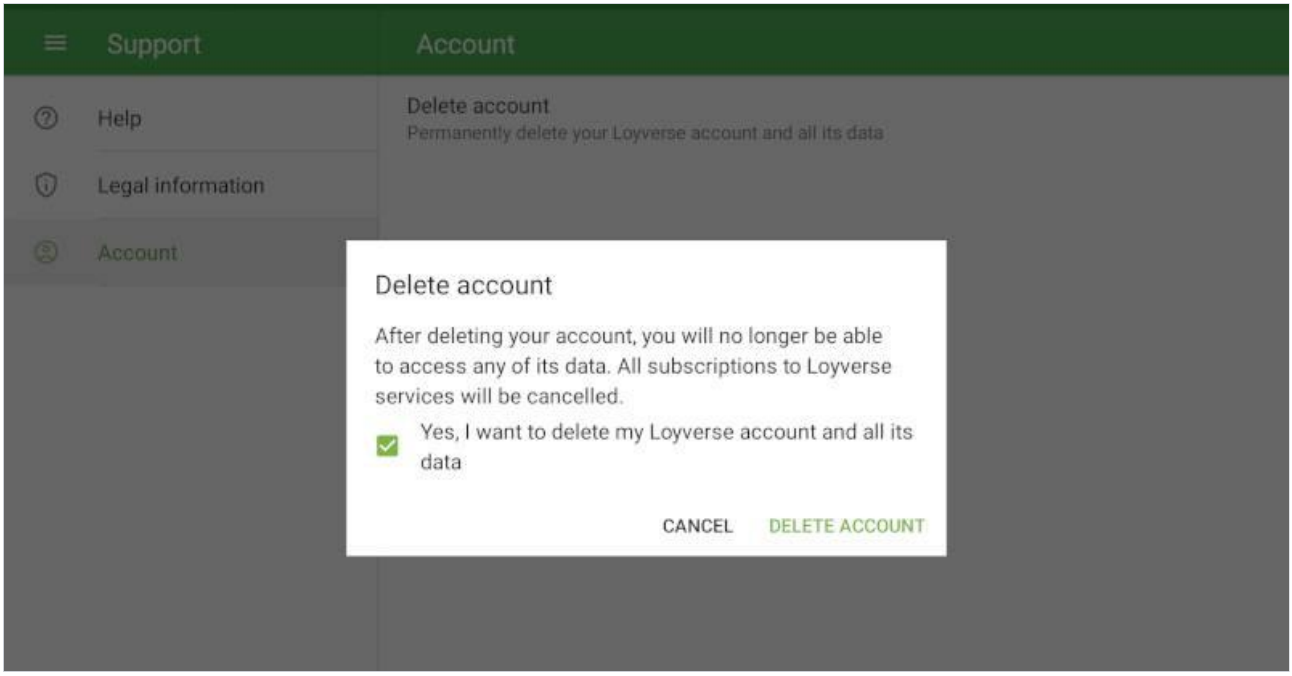
4. Enter the **owner password** for your Loyverse account and click **Continue**.



5. Complete the short questionnaire to indicate the reason for deletion.

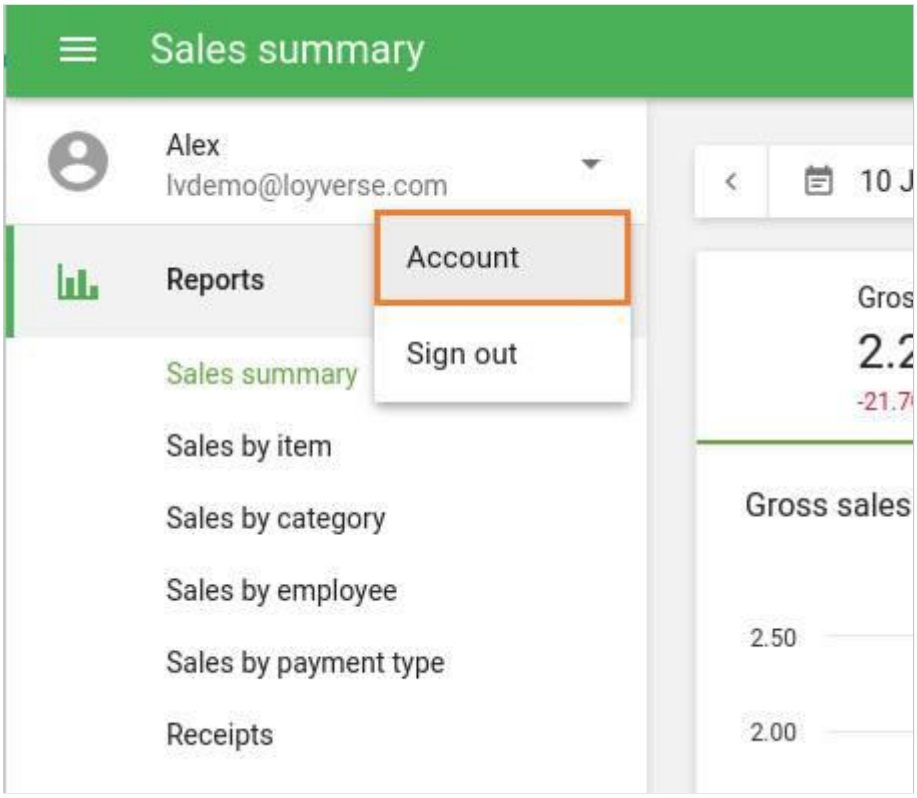


6. Confirm deletion by checking the confirmation box and tapping ‘Delete account’.

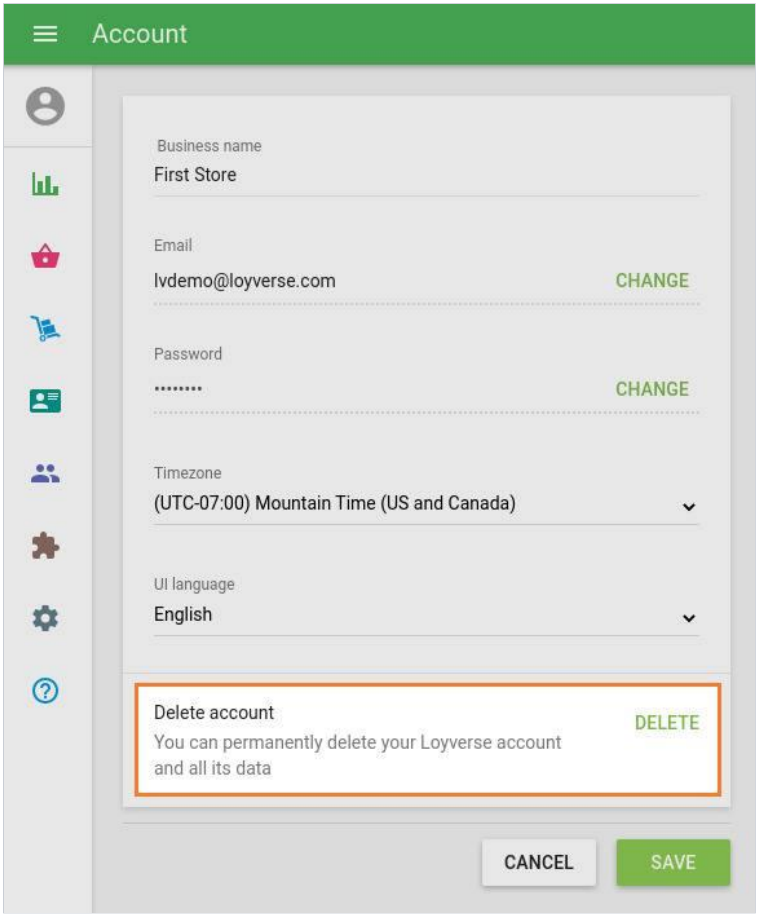


Deleting the Account from the Back Office

1. In the Back Office, click the '**Account**' button in the main menu.

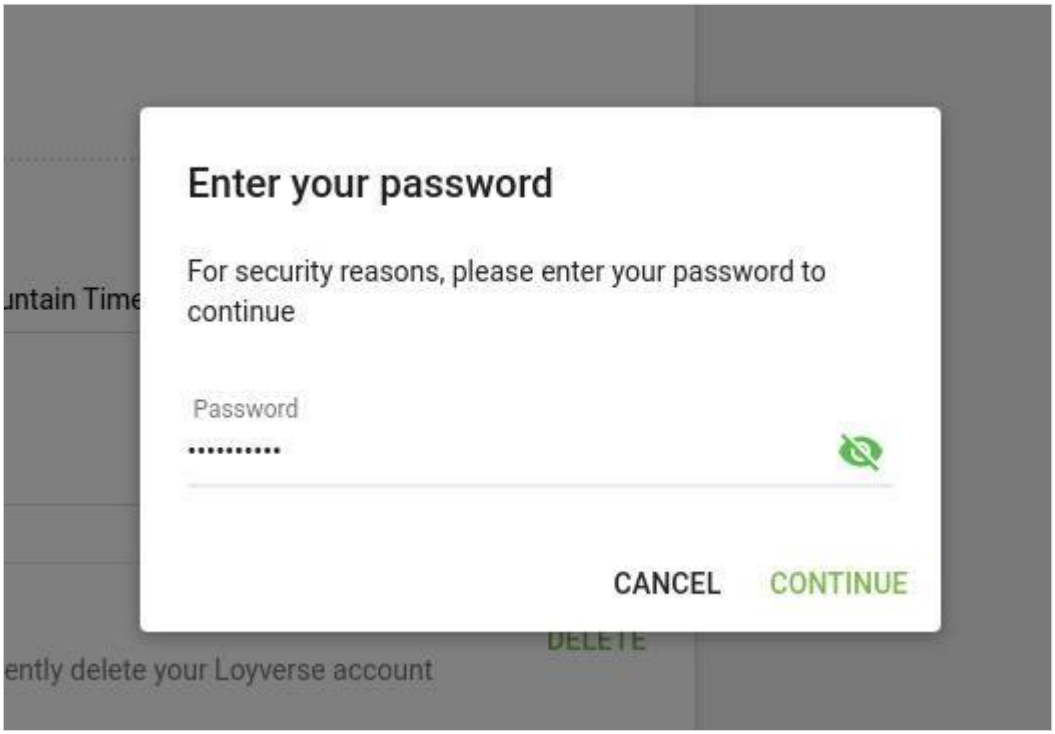


2. In the '**Delete account**' row, click the **Delete** button.



3. Follow the on-screen steps:

- Enter the **owner password**



- Select the reason for deletion

- Confirm account deletion

Important Notes

- **Permanent deletion:** All sales data, account settings, and related entities (items, discounts, taxes, customers, etc.) will be permanently removed.
- **Before deleting:** If you wish to keep your information, **export your data** from the Back Office first.
- Deleting the account will automatically **unsubscribe** you from all paid services and email newsletters.

See also:

How to Manage Account Settings in the Back Office

How to Export Data from Loyverse Account

How to Change Language

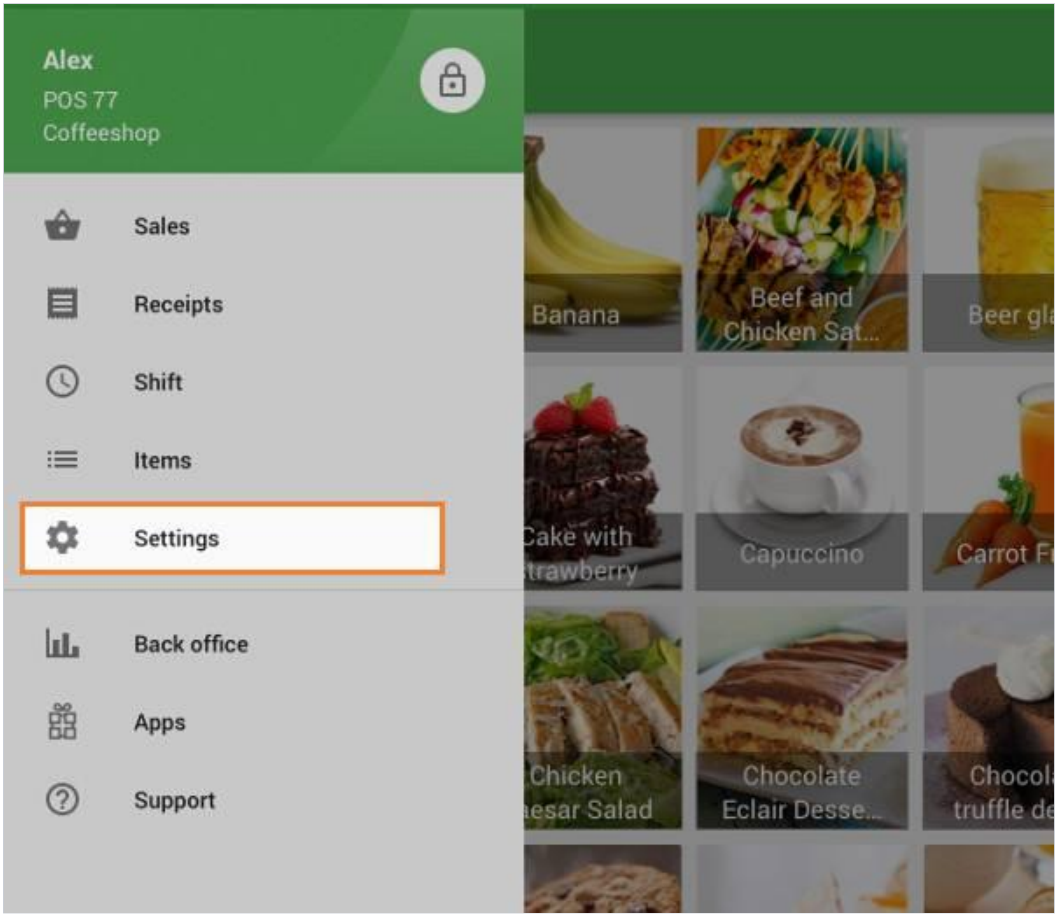
Loyverse POS supports multiple languages for the POS app, Back Office, and printed receipts. This guide will help you adjust language settings across all platforms.

Changing Language in the Loyverse POS App

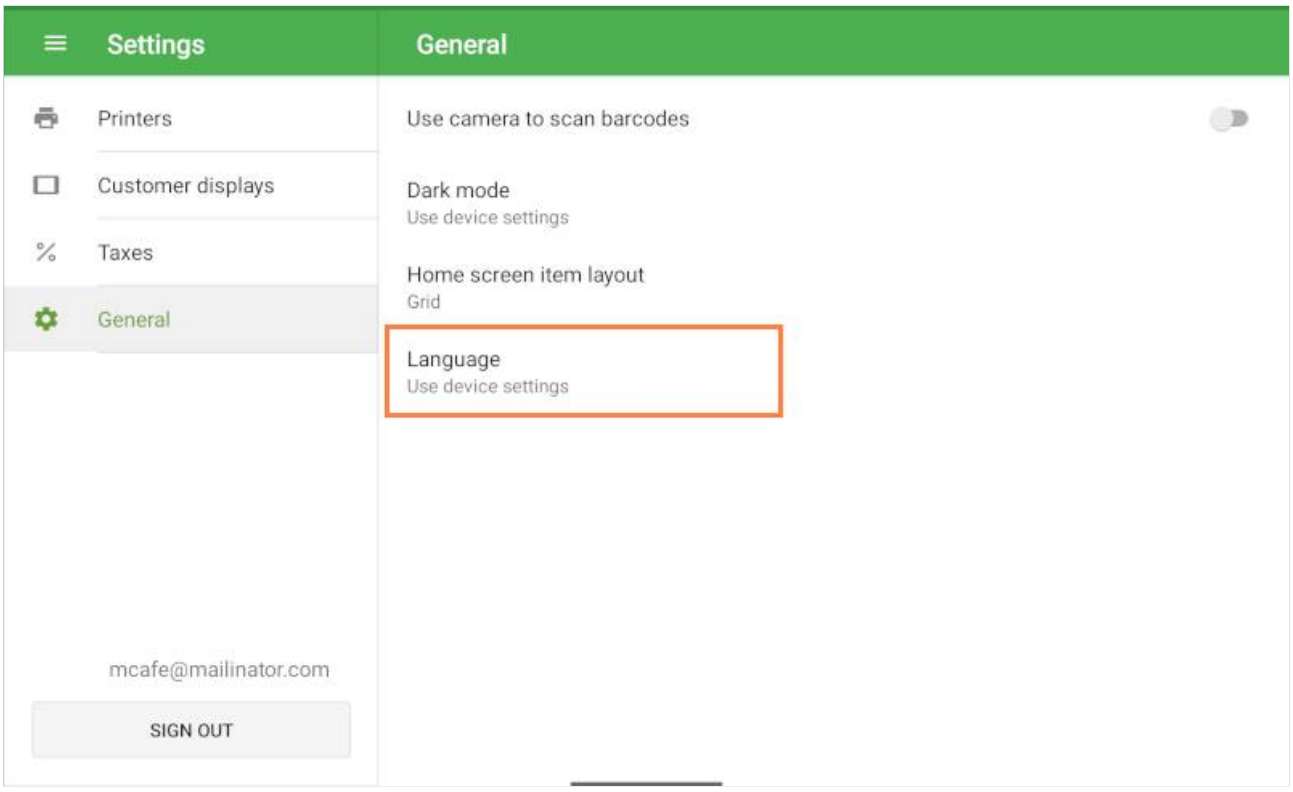
The Loyverse POS app uses your device's language by default. However, you can customize the language directly within the app.

How to Change the App Language:

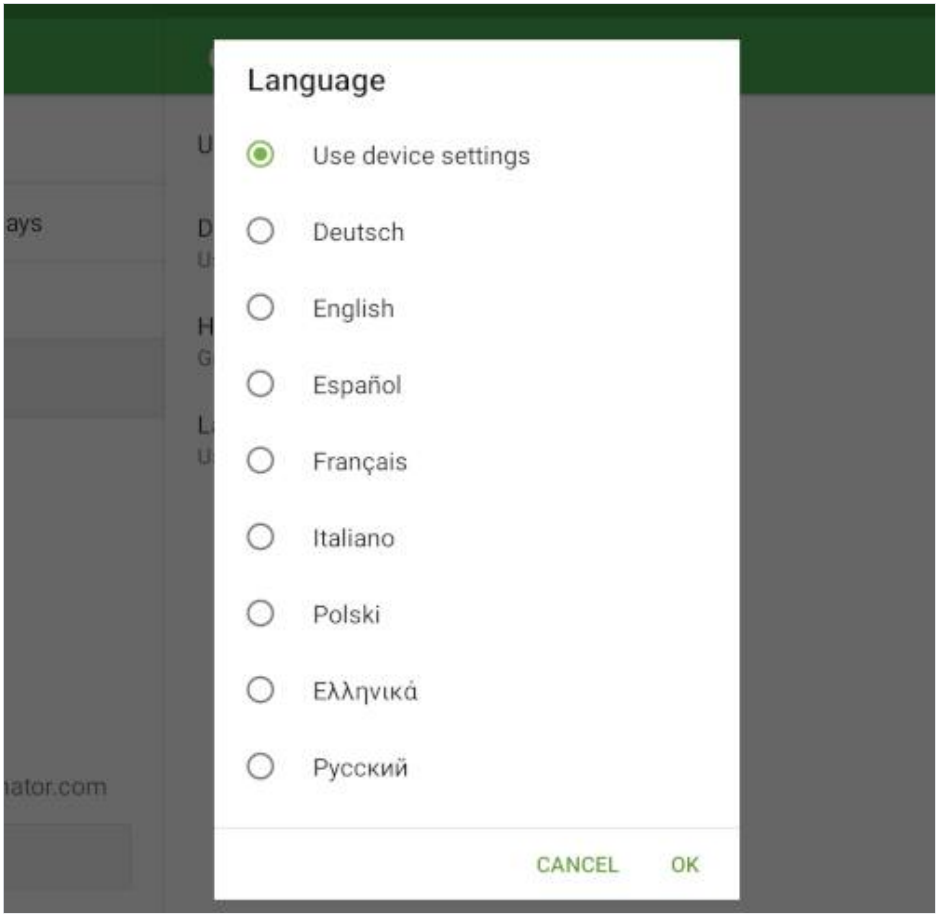
1. Open the Loyverse POS app and go to **Settings**.



2. In the **General** section, tap on the '**Language**' option.



3. Select your preferred language from the list and confirm by tapping '**OK**'.



Note that only the most popular languages are listed here, but the Loyverse POS app has versions in more than 40 languages. Use the device settings to select other languages.

Available Languages:
Albanian, Arabic, Bengali, Bulgarian, Chinese Simplified, Chinese Traditional, Croatian, Czech, Danish, Dutch, Estonian, Finnish, French, Georgian, German, Greek, Hebrew, Hindi, Hungarian, Indonesian, Italian, Japanese, Khmer, Korean, Laotian, Latvian, Lithuanian, Macedonian, Malay, Mongolian, Norwegian, Polish, Portuguese, Romanian, Russian, Serbian (Latin), Spanish, Swedish, Thai, Turkish, Urdu, Uzbek.

For Android Devices:

- On Androids, you can change the app language directly from the **General settings** of the Loyverse POS app.
- If you select '**Use device settings**', the app language will automatically follow your device's language.

For iOS Devices:

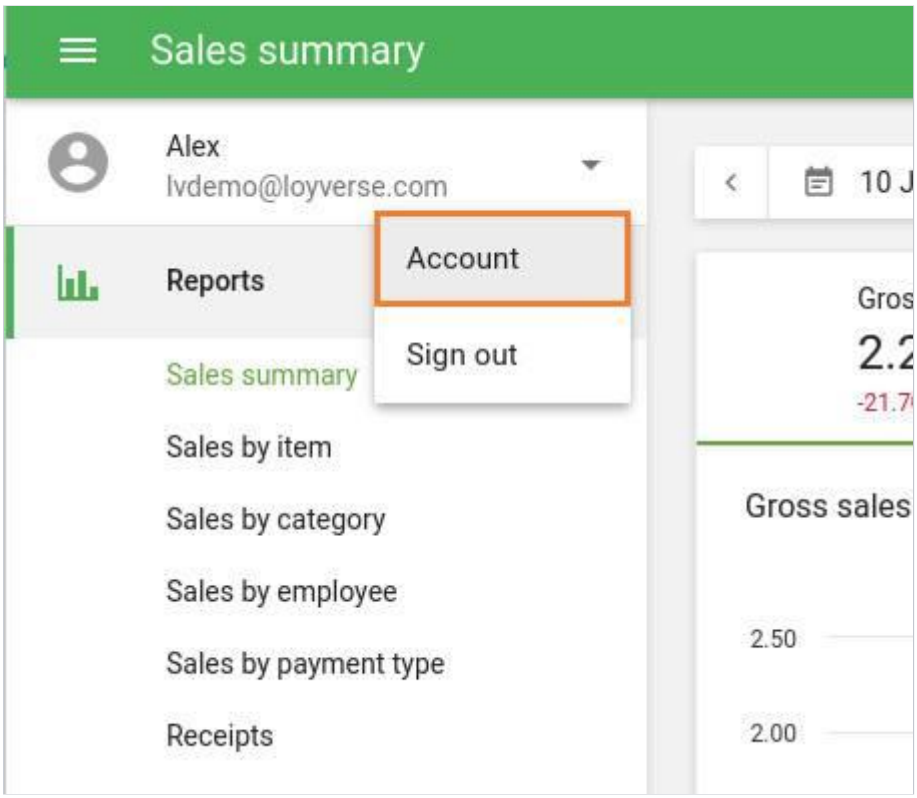
- **iOS 13 or higher:** Selecting the language option in the POS app redirects you to your device's app language settings for Loyverse POS.
- **iOS 12 or lower:** The Loyverse POS app follows the device's language settings.

Setting Language in the Back Office

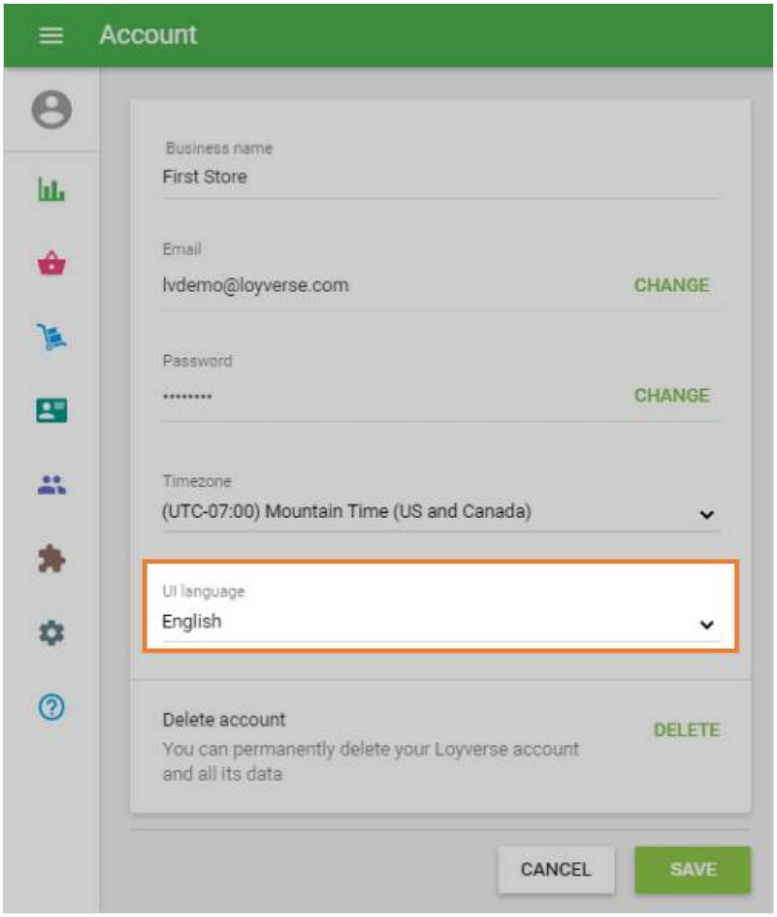
You can choose a language separate from the POS app language for your Loyverse Back Office.

How to Change Back Office Language:

1. Log in to your Back Office.
2. Go to **Account** settings.



3. Select your preferred language from the list.



Loyverse currently supports over 20 languages in the Back Office, including English, Spanish, French, German, Russian, Portuguese, Polish, Romanian, Italian, Indonesian, Japanese, Korean, Chinese, and more.
Note: The language you set in the Back Office does not affect the language of the Loyverse POS app.

Setting Receipt Language

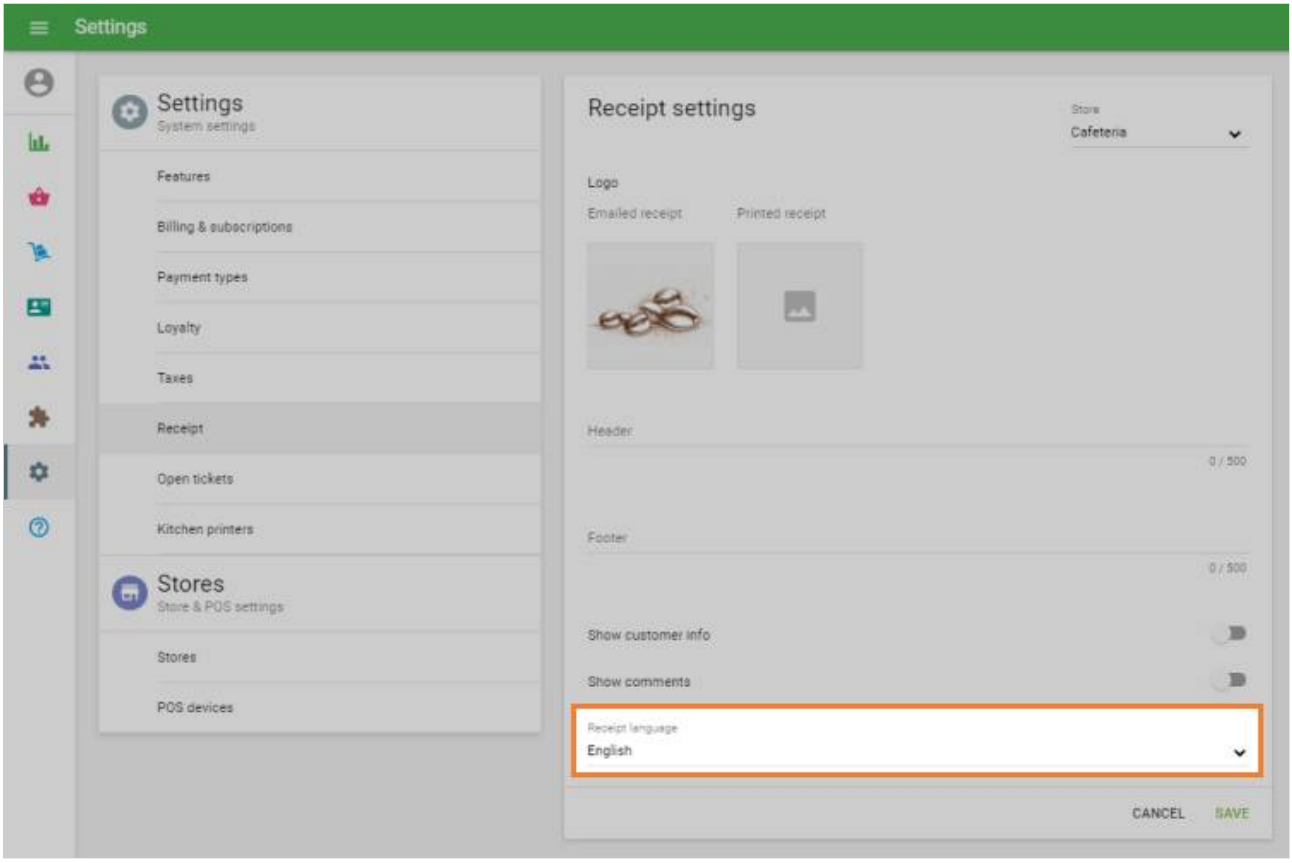
You can set a specific language for receipts printed or emailed from the POS system.

How to Change Receipt Language:

1. Log in to your Back Office.

2. Go to **Settings > Receipt.**

3. Choose the desired language for receipts from each store.



The selected receipt language will be applied to printed receipts, emailed receipts, and the Receipts list at POS.

Following these steps ensures a seamless multilingual experience across the Loyverse POS app, Back Office, and receipts.

See also:

How to Add Logo to the Receipts

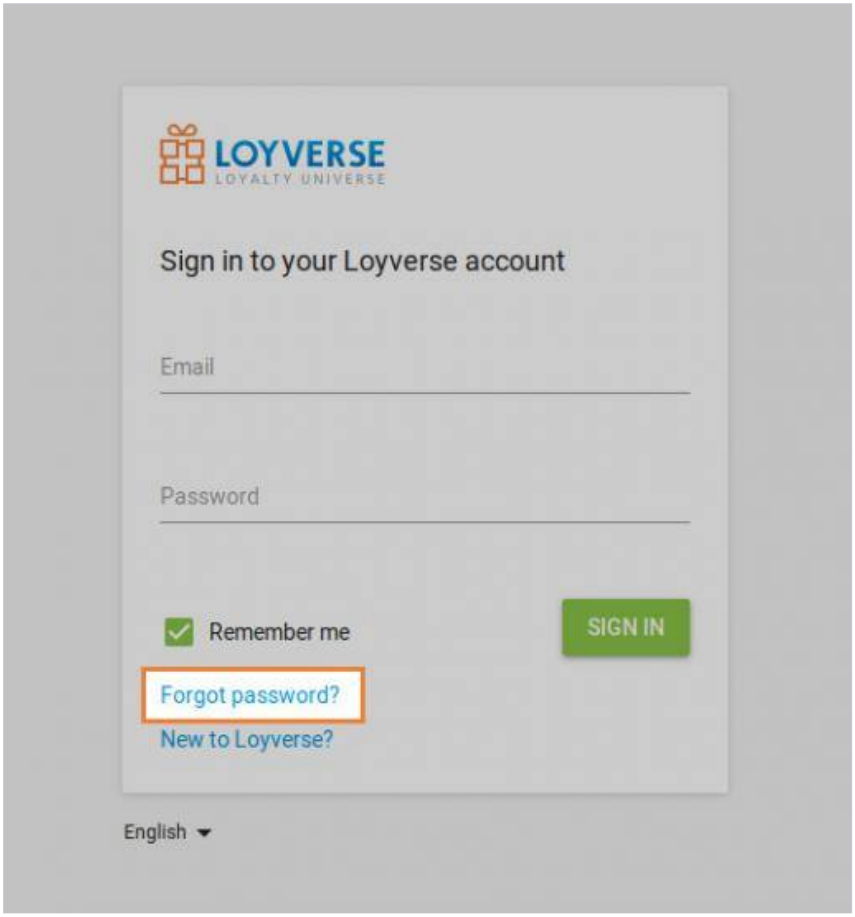
How to Set the Currency

How to Recover Password for the Back Office

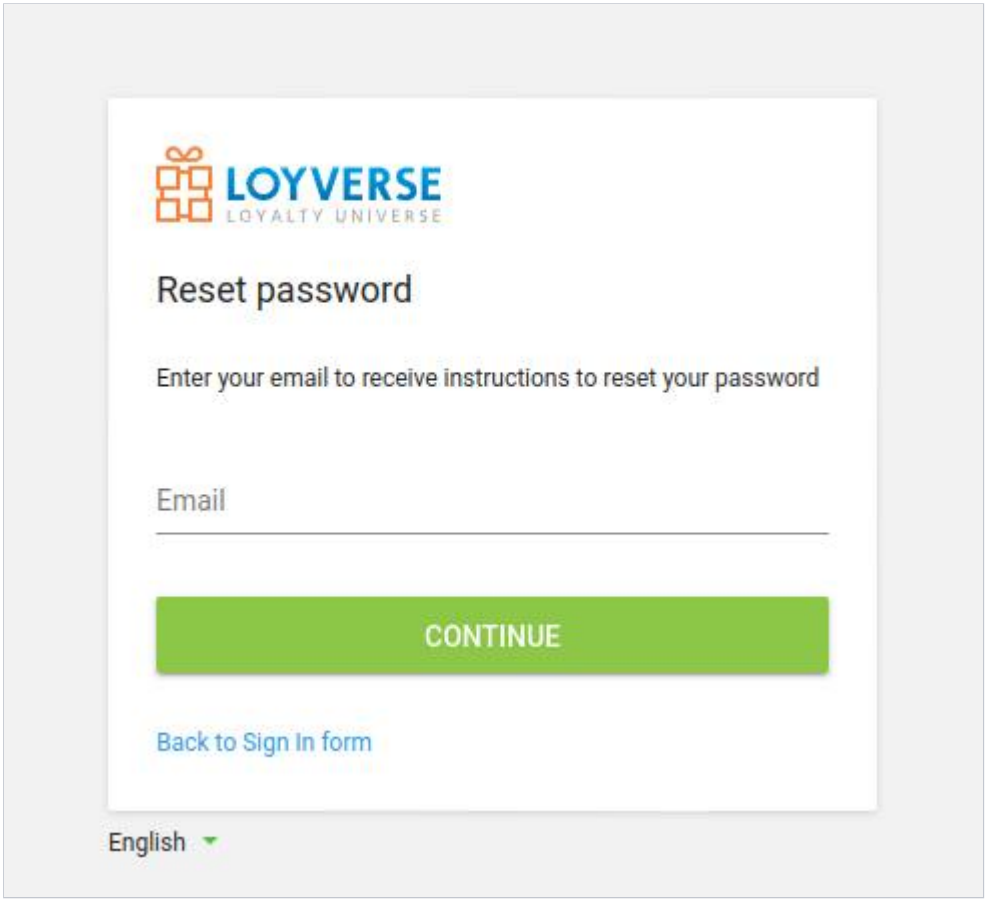
If you've forgotten your password or want to reset it, follow these simple steps:

Go to the login page for the Back Office: https://loyverse.com/signin

Click on the **"Forgot password?"** link under the login form.



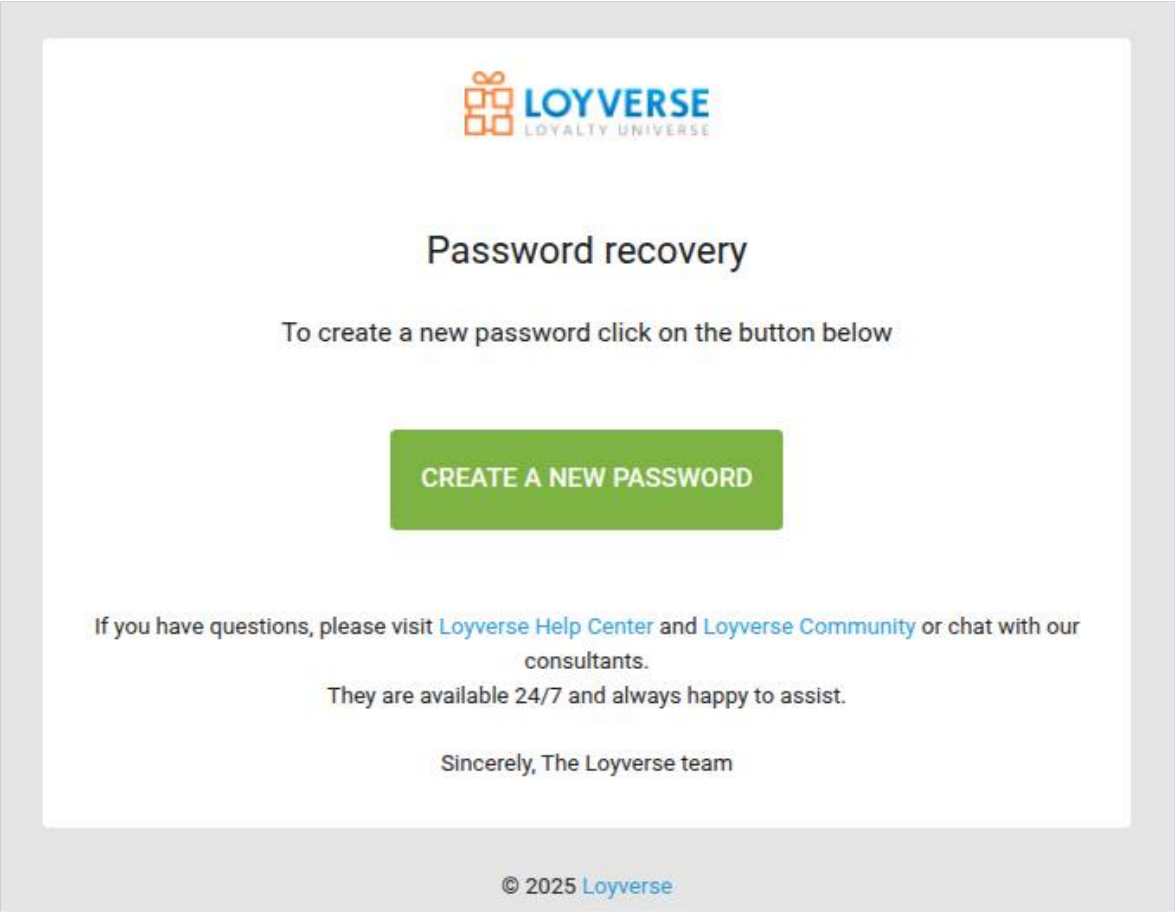
In the **Reset password** window, enter the **email address** associated with your Loyverse account and tap '**Continue**'.



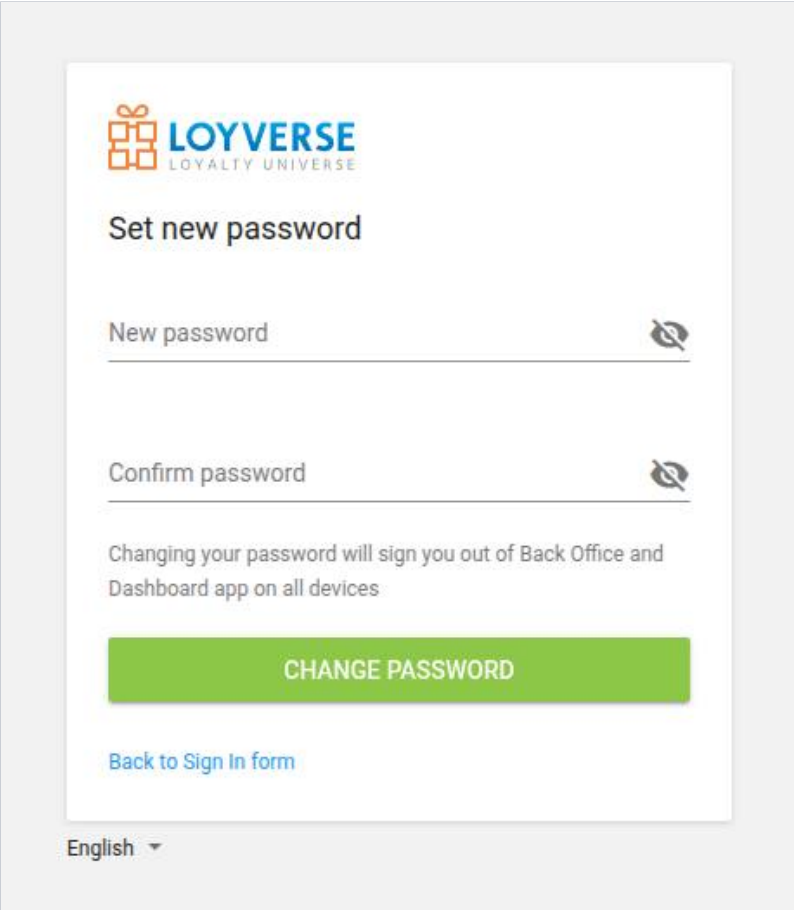
Check your email inbox for instructions.

Tip: If you don't see the email, check all your folders, including spam or junk. The message may be filtered there.

Open the email and click on the '**Create a new password**' link.



On the password reset page, enter your **new password** twice and click '**Change password**' to confirm.



After successfully updating your password, you will be redirected to the Back Office login screen, where you can now sign in with your new password.

Note: After changing the password, all active connections to the Back Office and Dashboard app will be logged out, and you will have to log in again with a new password.

See also:

How to Manage Account Settings in the Back Office

Setting Up Your Shop in Loyverse Back Office

How to Sign out from Loyverse POS

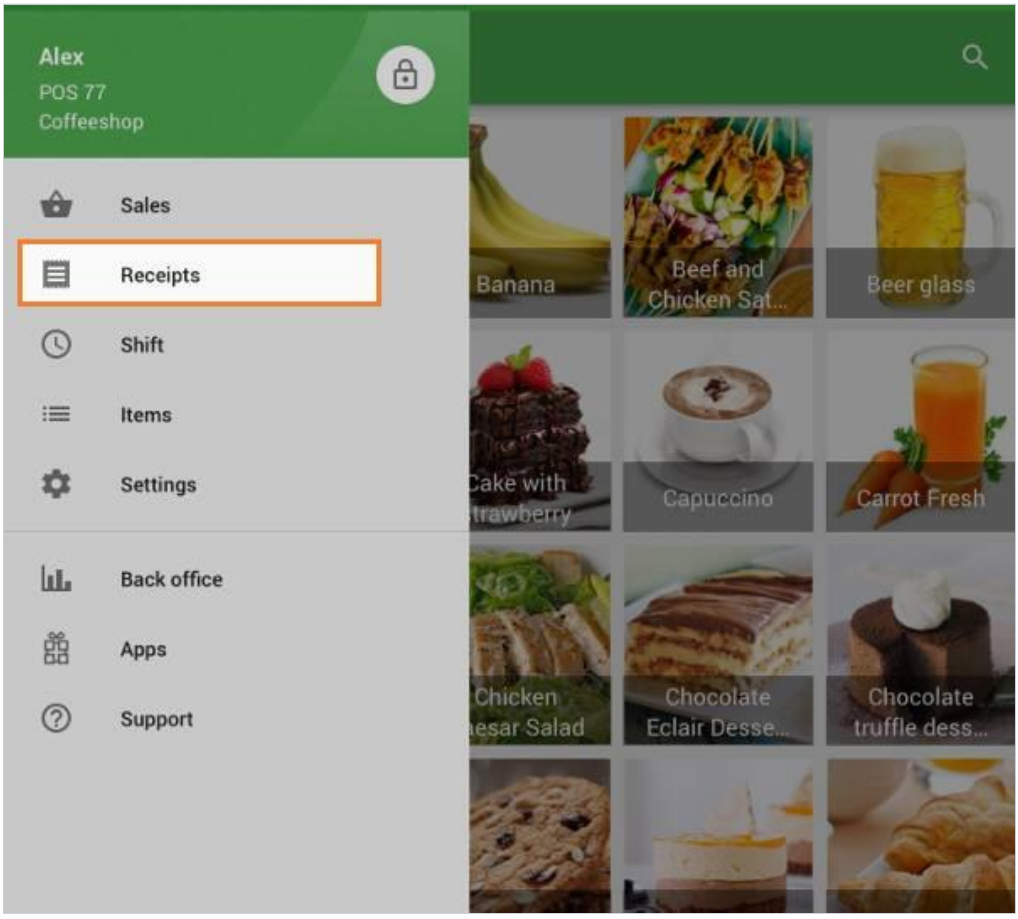
Video
https://www.youtube.com/watch?v=oa0YegMbzxM

Signing out from Loyverse POS requires a few steps to ensure that all your data is securely synced. Follow these guidelines to avoid losing important information:

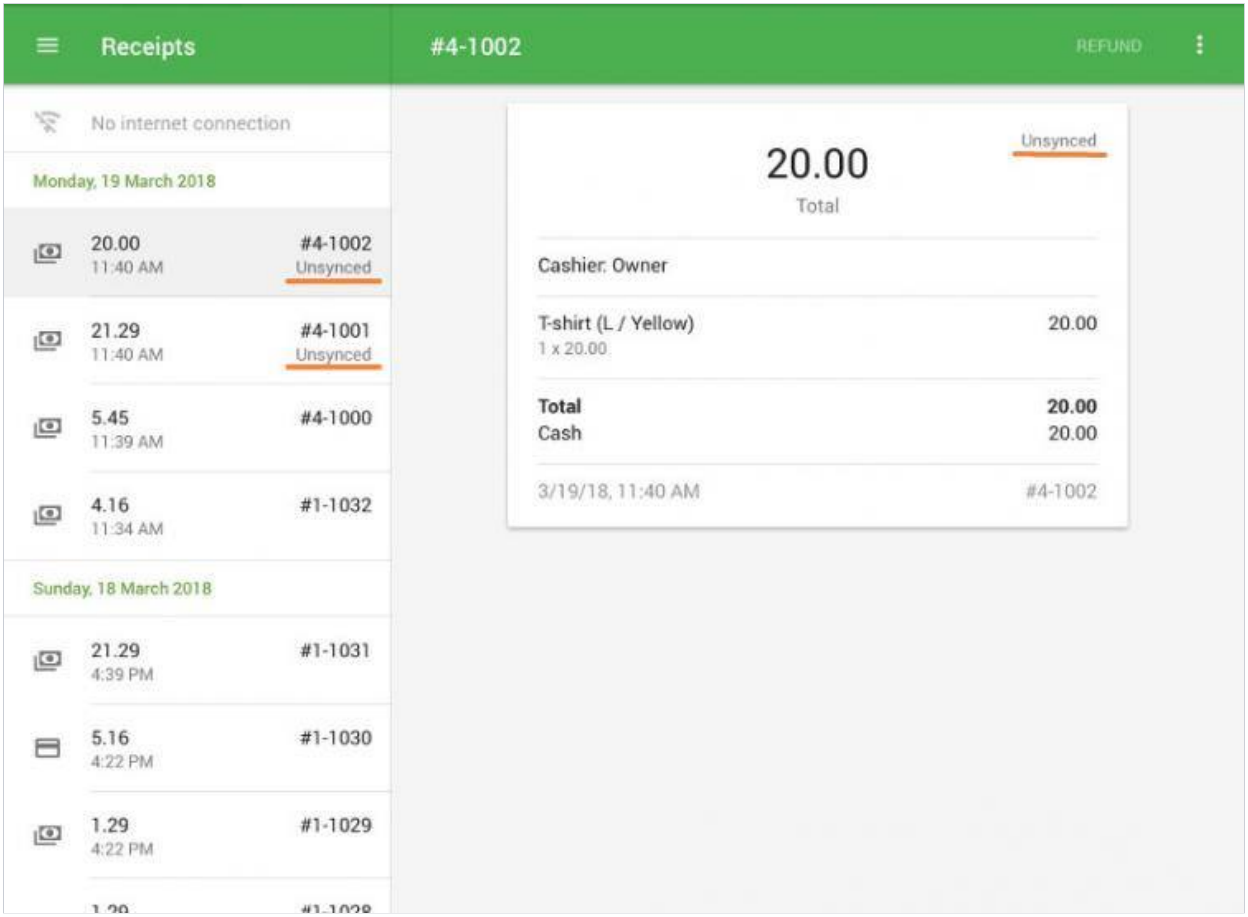
Steps to Safely Sign Out:

1. Check for Unsynced Receipts:

Go to the '**Receipts**' section in the Loyverse POS app.



Look for receipts marked as "**Unsynced**" in the list.



2. Sync Receipts:

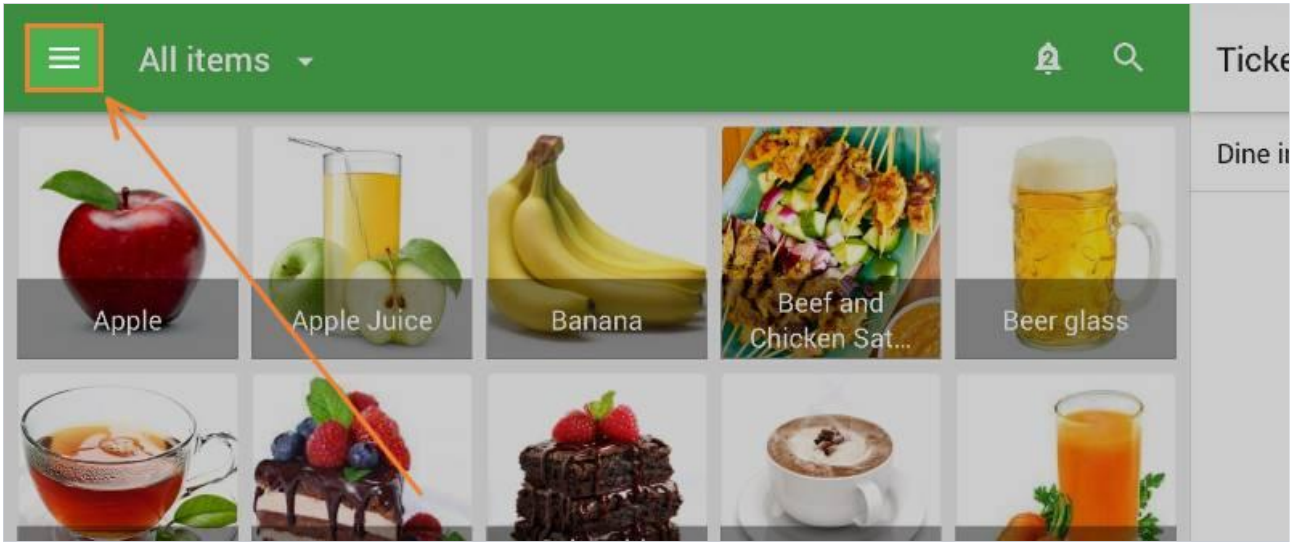
- If you see any unsynced receipts, reconnect your device to the Internet.
- Allow the app to automatically sync the receipts with the Back Office.
- You can also tap the **sync** button in the three-dots menu to manually trigger synchronization.

3. Verify Sync Completion:

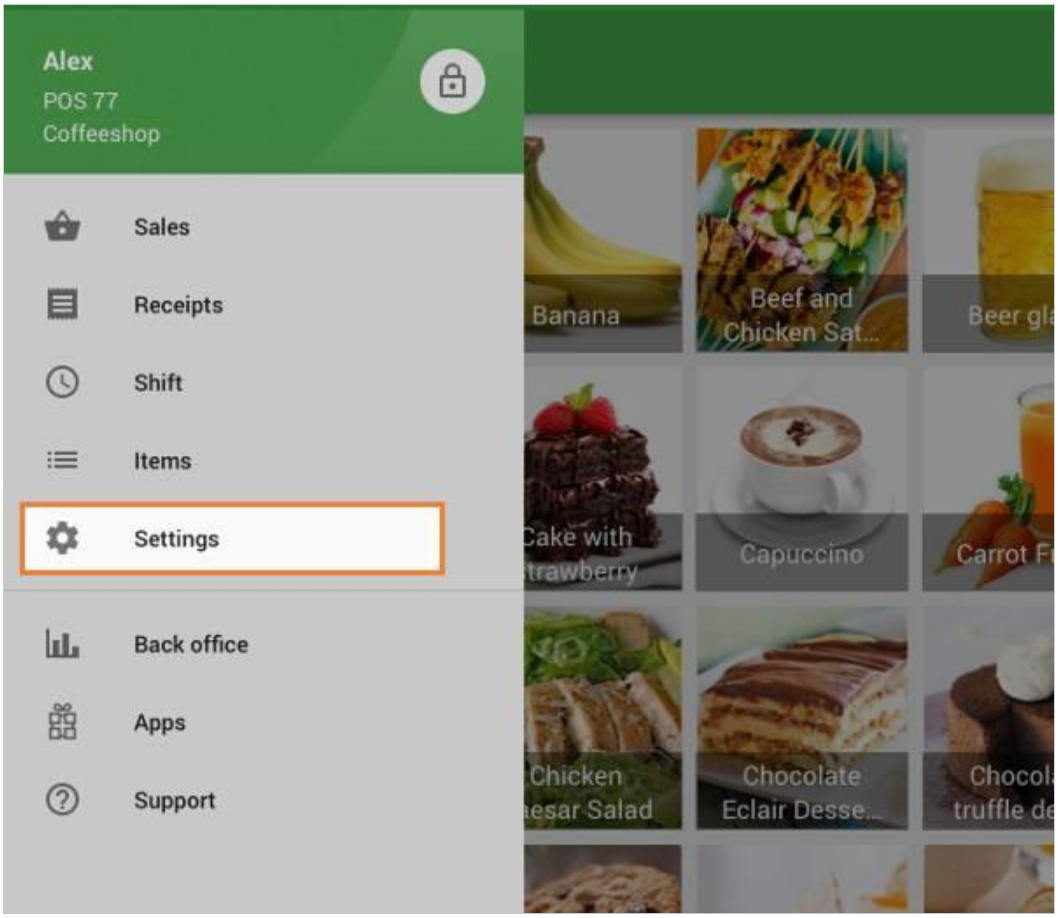
Ensure that no receipts are marked as “Unsynced” in the Receipts section before proceeding.

4. Sign Out:

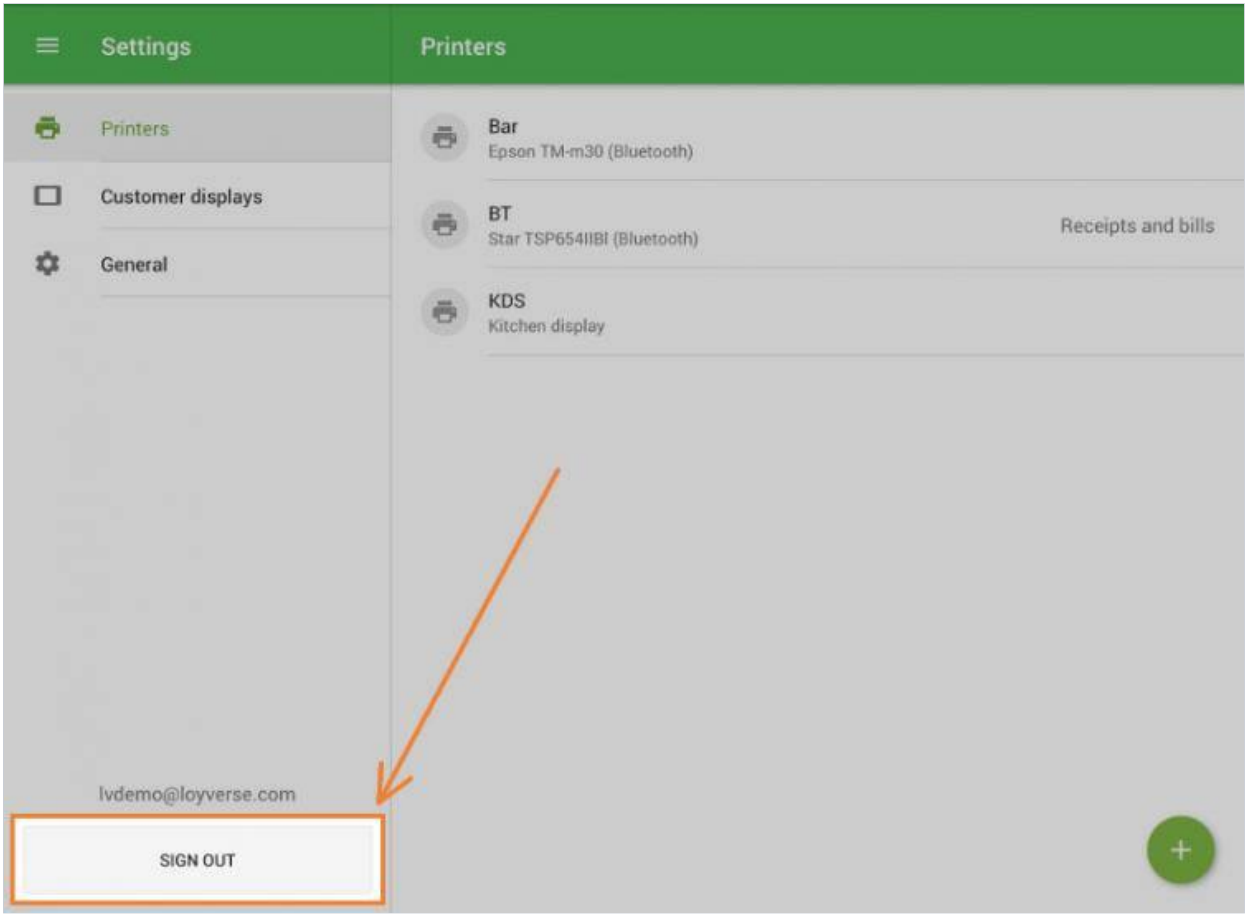
Open the **Menu** in the Loyverse POS app.



Select **Settings**.



Tap the **Sign Out** button to log out from your account.



Important Note:

- **The system will not allow you to sign out if your device has been disconnected from the Internet and has unsynced receipts.**
- Unsynced receipts are sales recorded while offline and stored locally on your device. To prevent data loss, these receipts must be synced with the Back Office before signing out.

Additional Tips:

- Always check your Internet connection before attempting to sign out.
- Regularly sync your device to avoid a buildup of unsynced receipts.

By following these steps, you can securely sign out from Loyverse POS without losing any sales data.

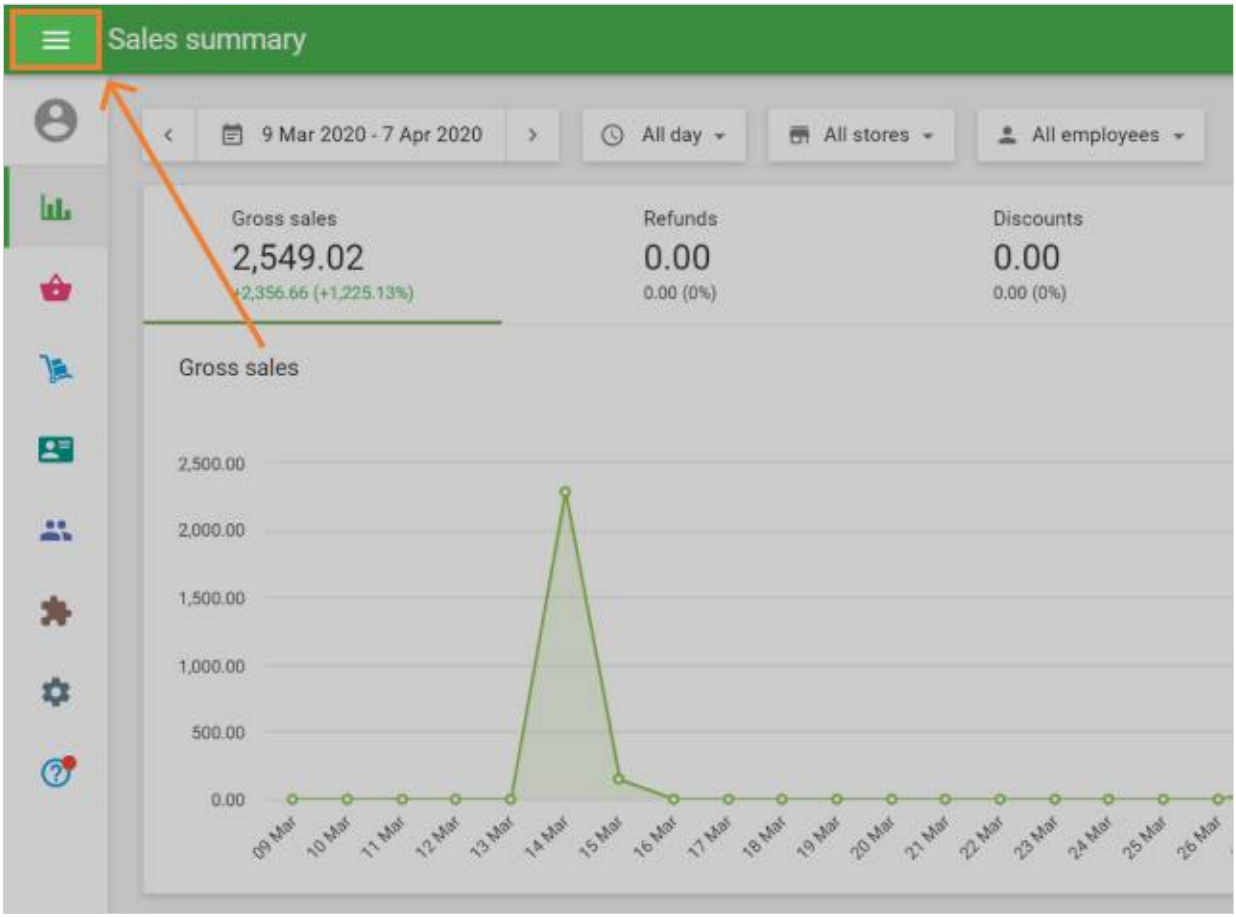
See also:

How to Exit from Back Office

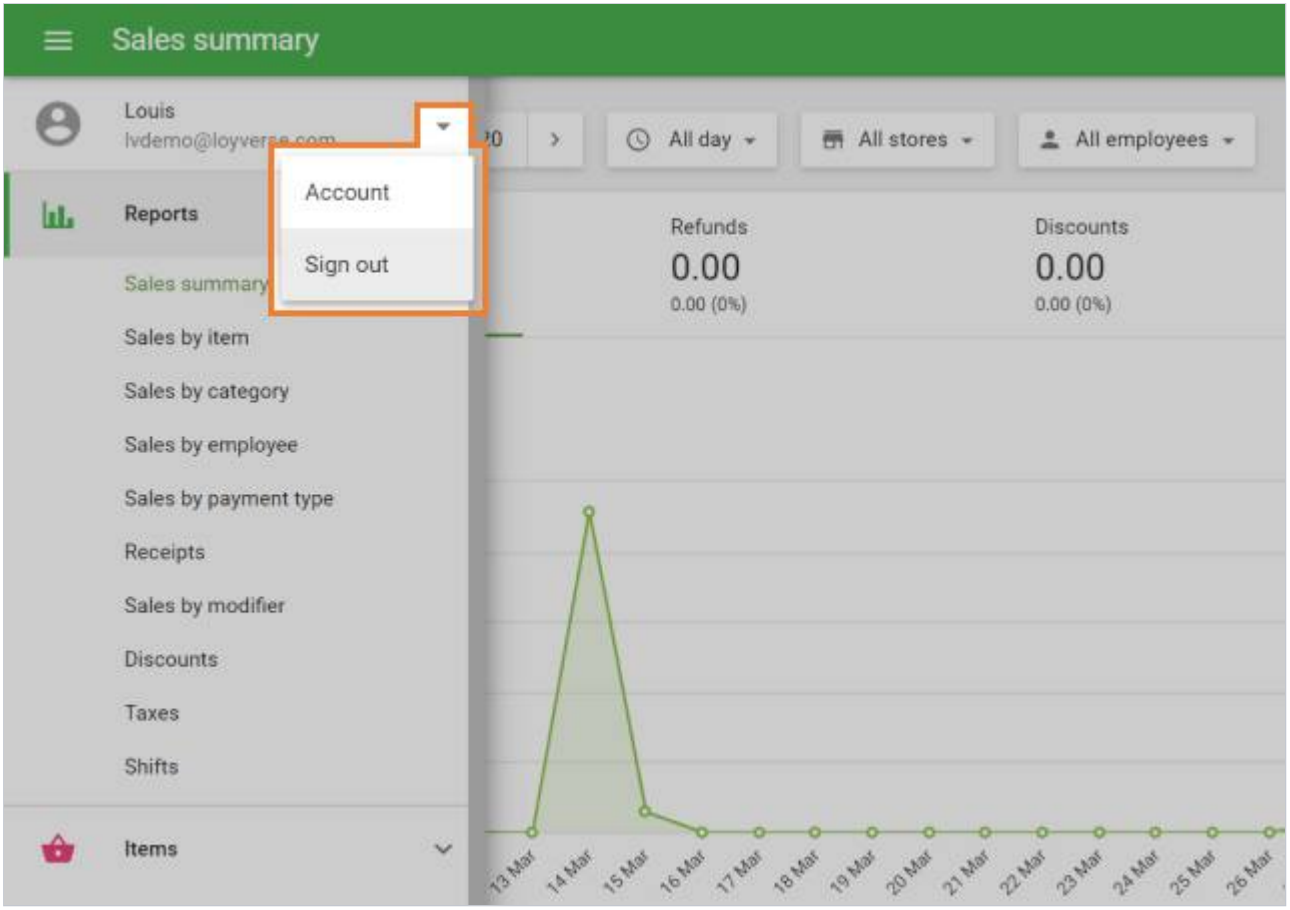
How to Sign Out from the Back Office

To securely exit your account in the Loyverse Back Office, follow these steps:

1. Go to the **main menu** in the top-right corner of the Back Office screen.



2. Click the **drop-down arrow** next to your **username and email**.



3. In the drop-down menu, click '**Sign out**'.

You will be logged out and redirected to the login page.

Tip: It's recommended to sign out after completing your work—especially on shared or public devices—to keep your account safe.

See also:

How to Exit from Loyverse POS

How to Increase the Font Size on Android Devices

If you prefer larger text in the Loyverse POS app, you can increase the font size through your Android device settings. This will adjust the text size throughout the POS interface.

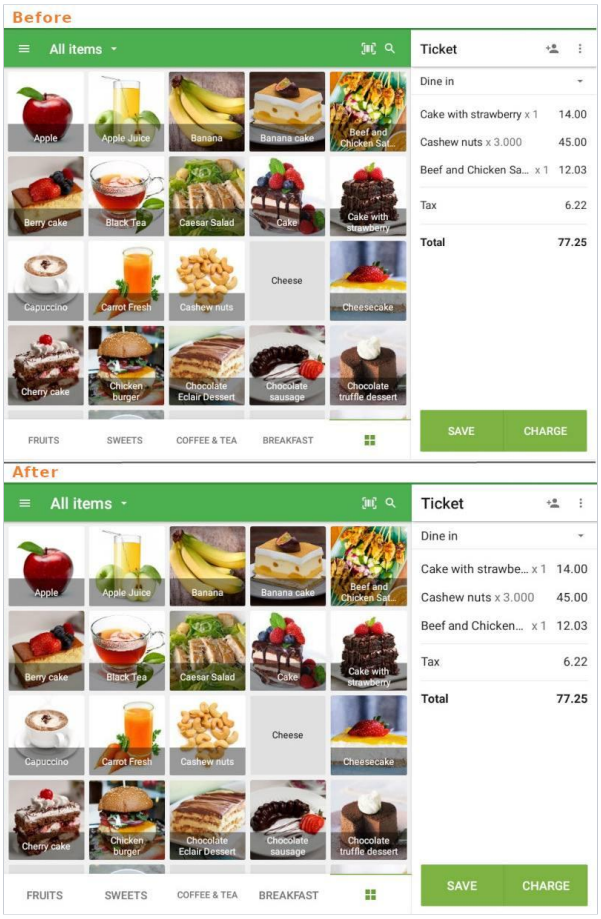
1. Change Font Size in Device Settings

The Loyverse POS app follows the system font size set on your Android device.

To adjust it:

1. Open your device's **Settings**.

2. Navigate to the **Display** section.
3. Tap **Font size** or **Screen zoom and font** (wording may vary depending on the device model).
4. Use the slider to increase the font size.
5. Exit settings — the new font size will now be applied in the Loyverse POS app.



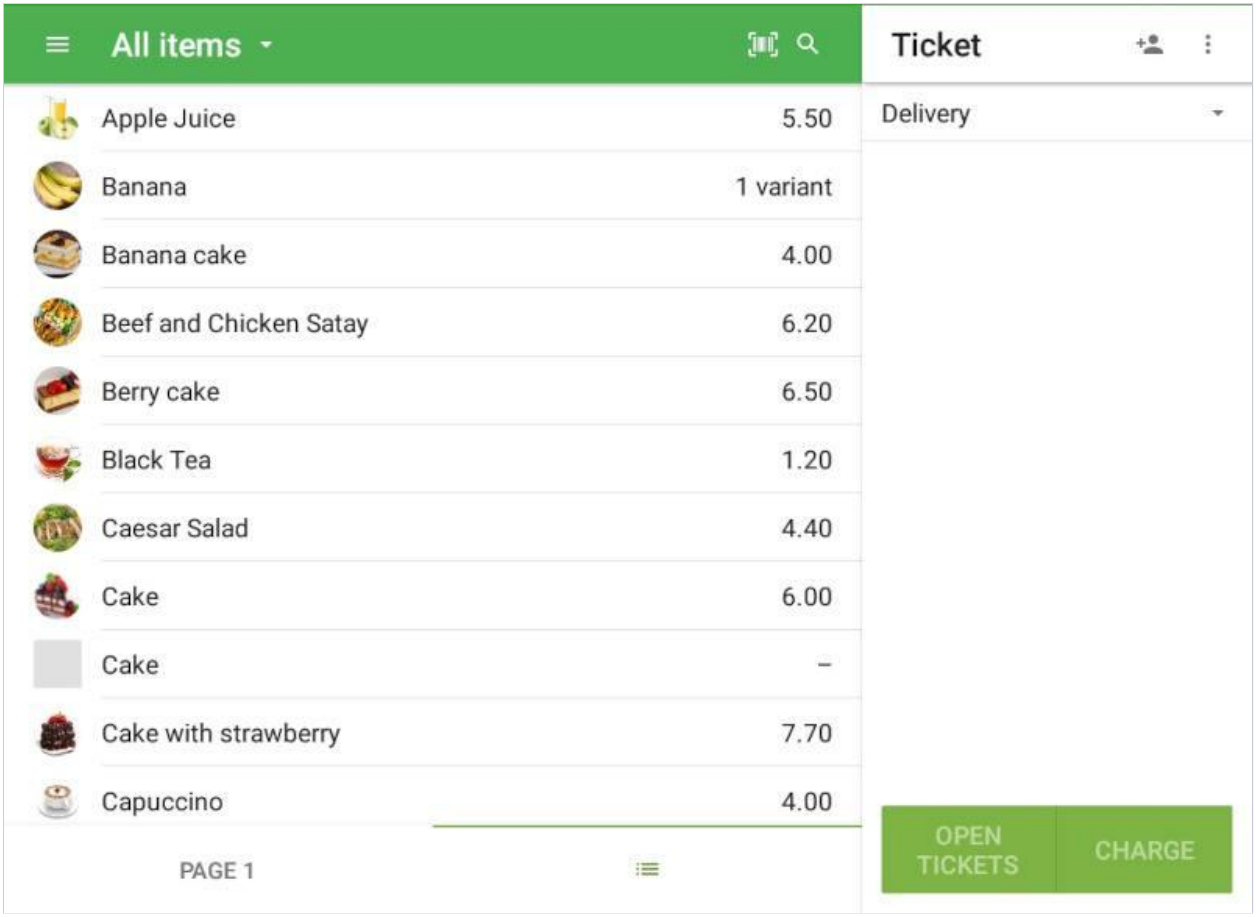
Note: This feature is based on Android's built-in functionality. Some words may display incorrectly or be cut off in certain languages due to formatting limitations.

2. Adjust Layout in the Loyverse POS App

For clearer visibility of item names, you can change the layout style within the app:

1. Open **Loyverse POS**.
2. Go to **Settings > Home screen item layout**.
3. Select the **List view** layout.

This option displays the item's name in a larger format, making it easier to read.



Important: Changing font size on the device does **not** affect the font size on printed receipts.

See also:

How to Change Home Sale Screen Layout

POS & Stores

How to Create, Activate, Deactivate and Delete POS

Properly managing your POS (Point of Sale) devices ensures smooth operations and secure access to your Loyverse system. Here's a step-by-step guide to help you manage POS devices in the Back Office.

Who Can Manage POS Devices?

Only the **account owner** or **employees** with the '**Manage POS devices**' access right can perform these actions.

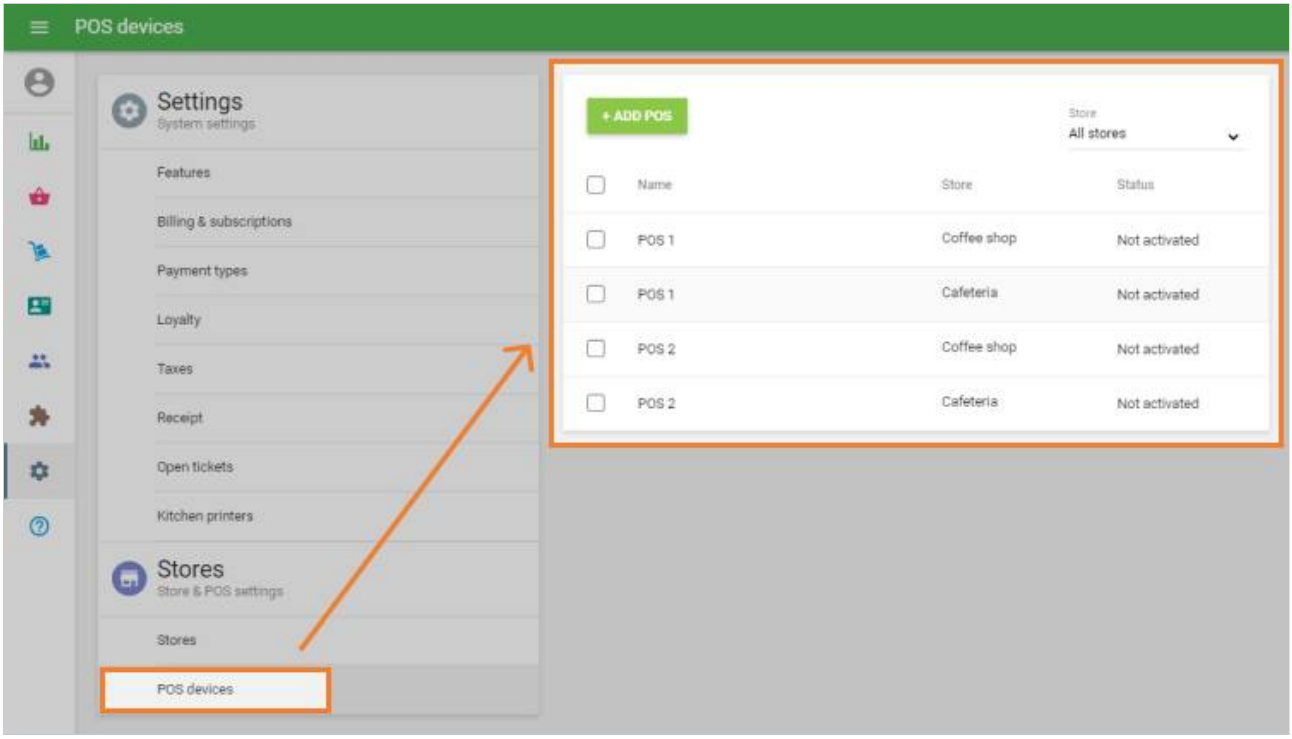
1. How to Create a New POS

To add a new POS device:

1. Log in to the **Back Office**.

2. Navigate to the '**POS devices**' section under Settings.

3. Click the '**Add POS**' button.

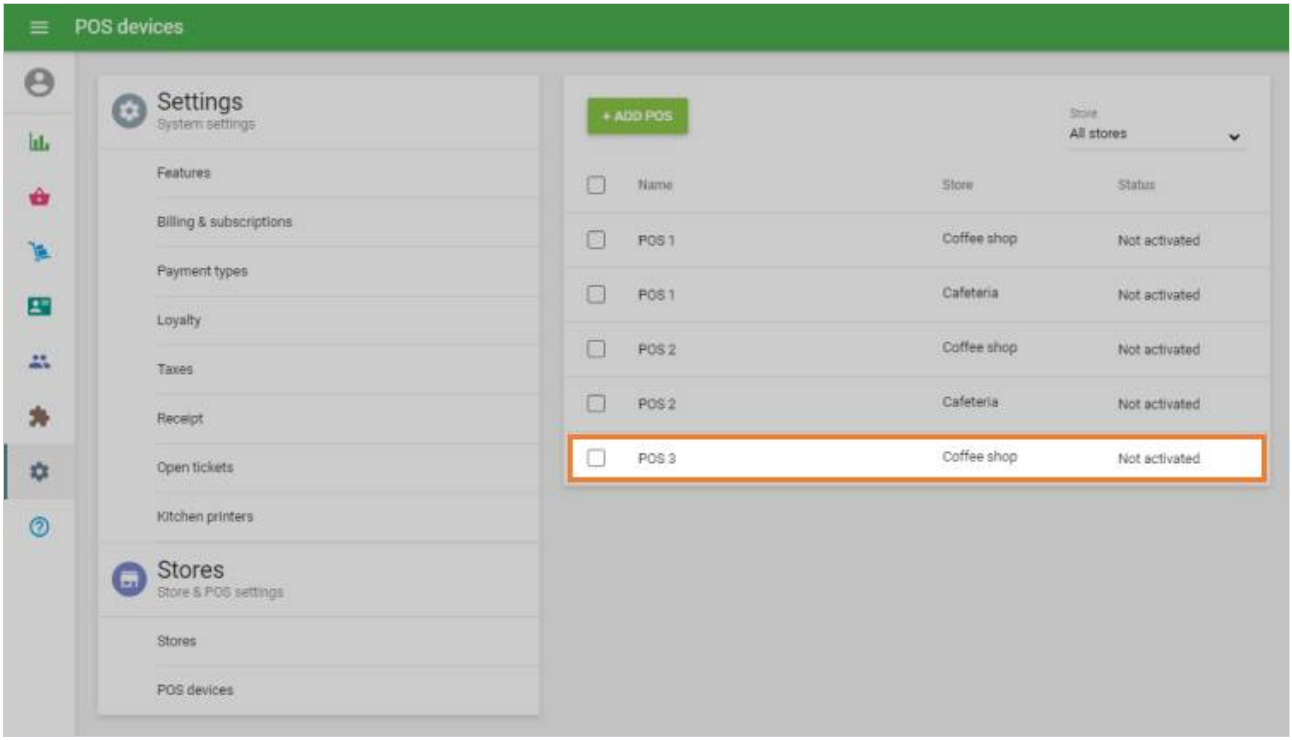


4. In the '**Create POS**' form:

- Enter the **POS Name**.
- Select the **Store** where this POS will be used.

5. Click '**Save**'.

Your new POS will now appear in the device list with the status '**Not Activated**'.



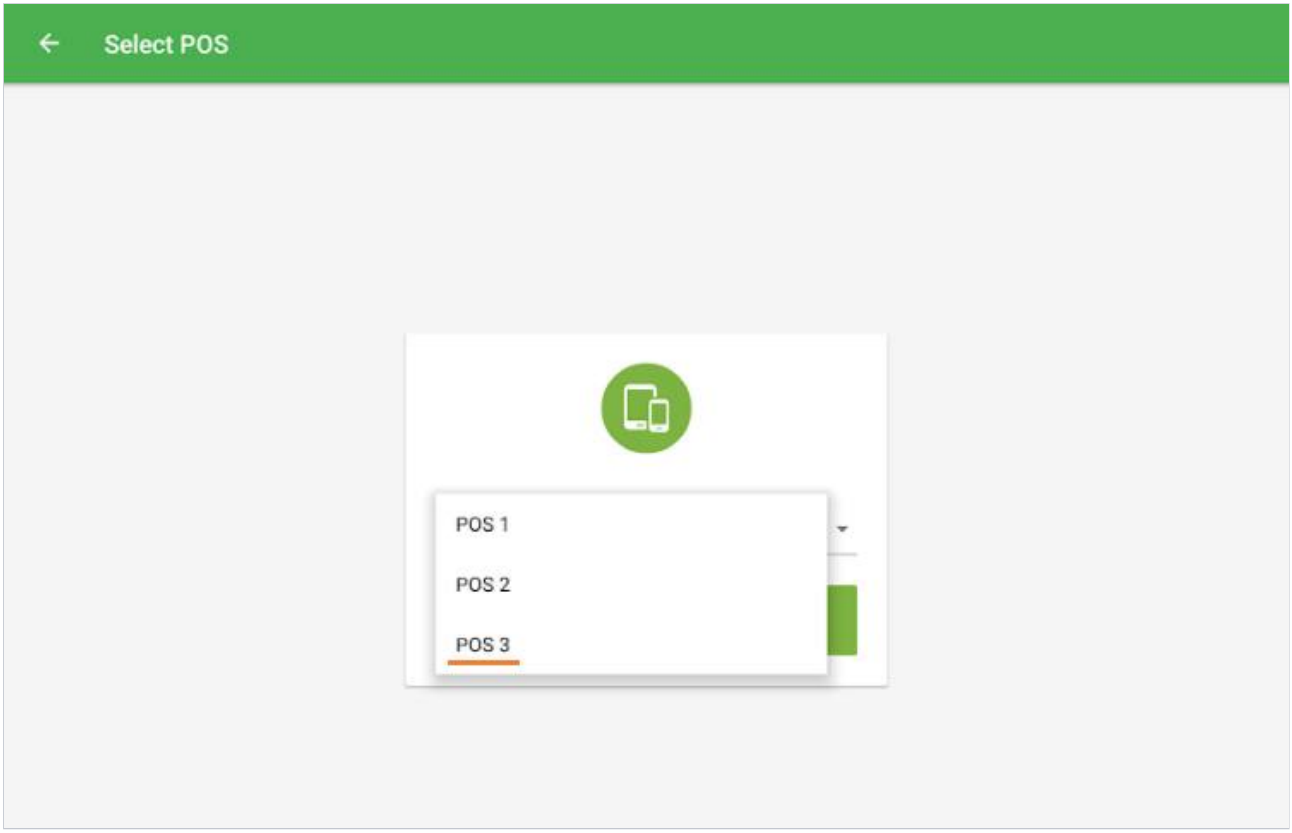
2. How to Activate a POS

To activate your newly created POS:

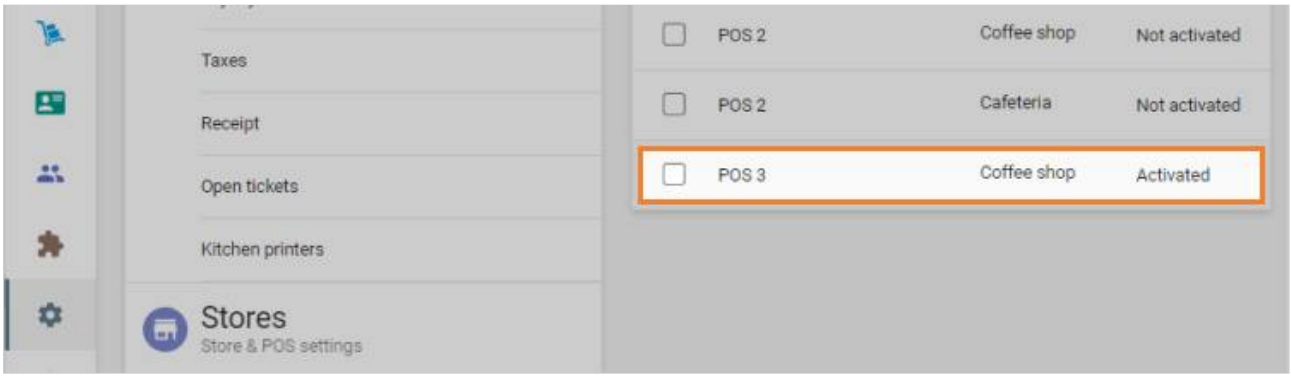
1. On your **mobile device**, open the Loyverse POS app.

2. Log in using the **email and password** of the **account owner** or an **authorized employee**.

3. Choose the POS.



After login, the POS will automatically be **activated**, and its status in the Back Office will change to '**Activated**'.



You can then [switch the user] to another employee from within the app if needed.

3. How to Deactivate a POS

Deactivation may be necessary in cases such as:

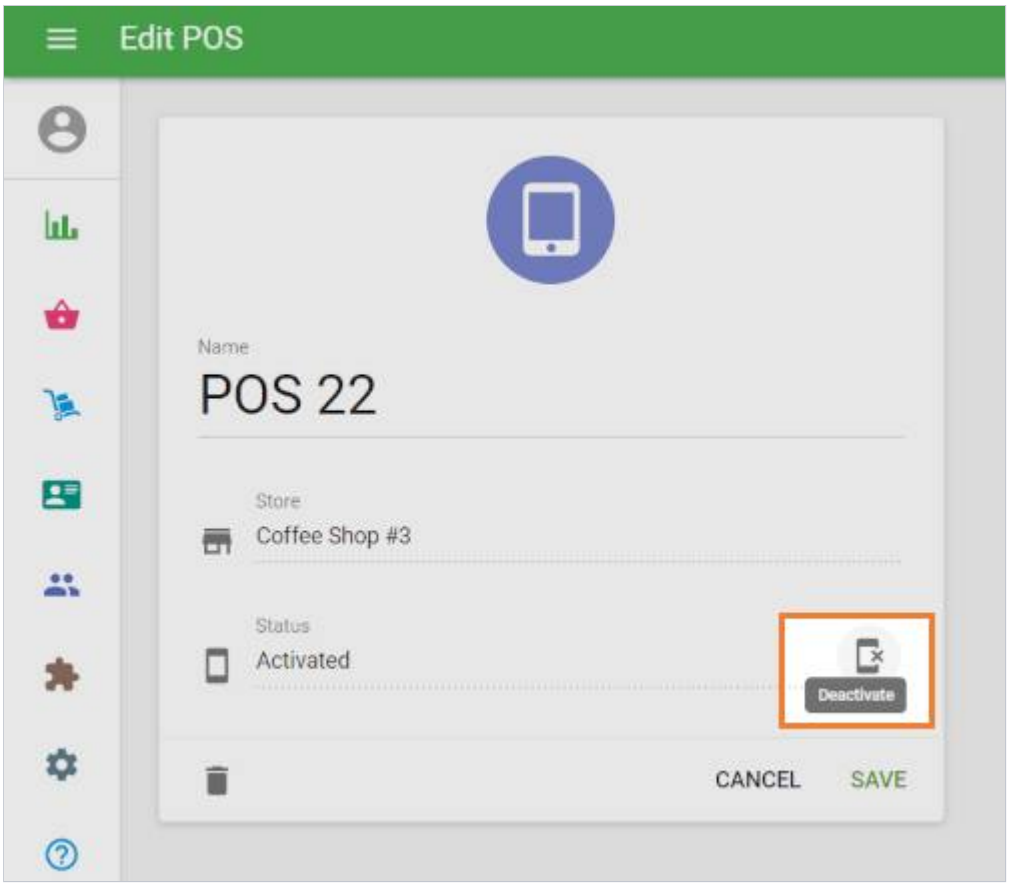
- The device is **lost**, **broken**, or **replaced**.
- You need to log in to a new device using the same POS slot.

Important: Deactivating a POS will result in the loss of all **unsynced sales data** on the device.

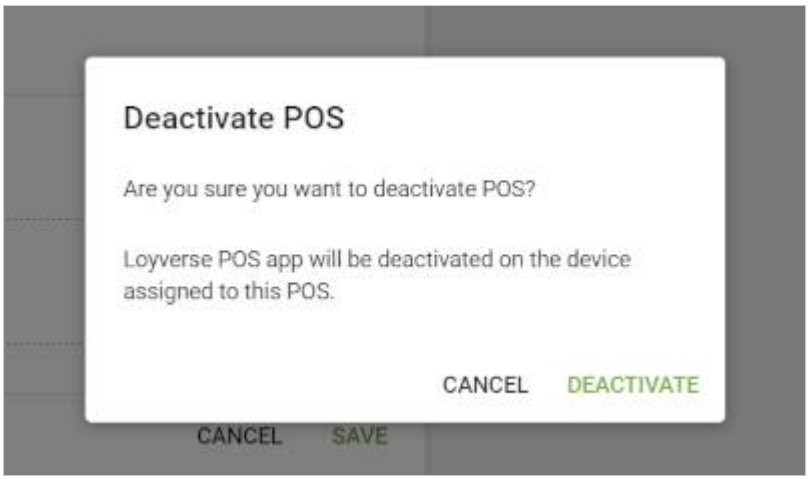
To deactivate a POS:

1. In the '**POS devices**' list, click to **edit** the activated POS.

2. Click the '**Deactivate**' icon next to the **Status** field.



3. Confirm the action by clicking '**Deactivate**' in the popup.



The POS status will now return to '**Not Activated**', and you can log in with this POS on a new device.

4. How to Delete a POS

⚠ **Before deleting a POS**, ensure:

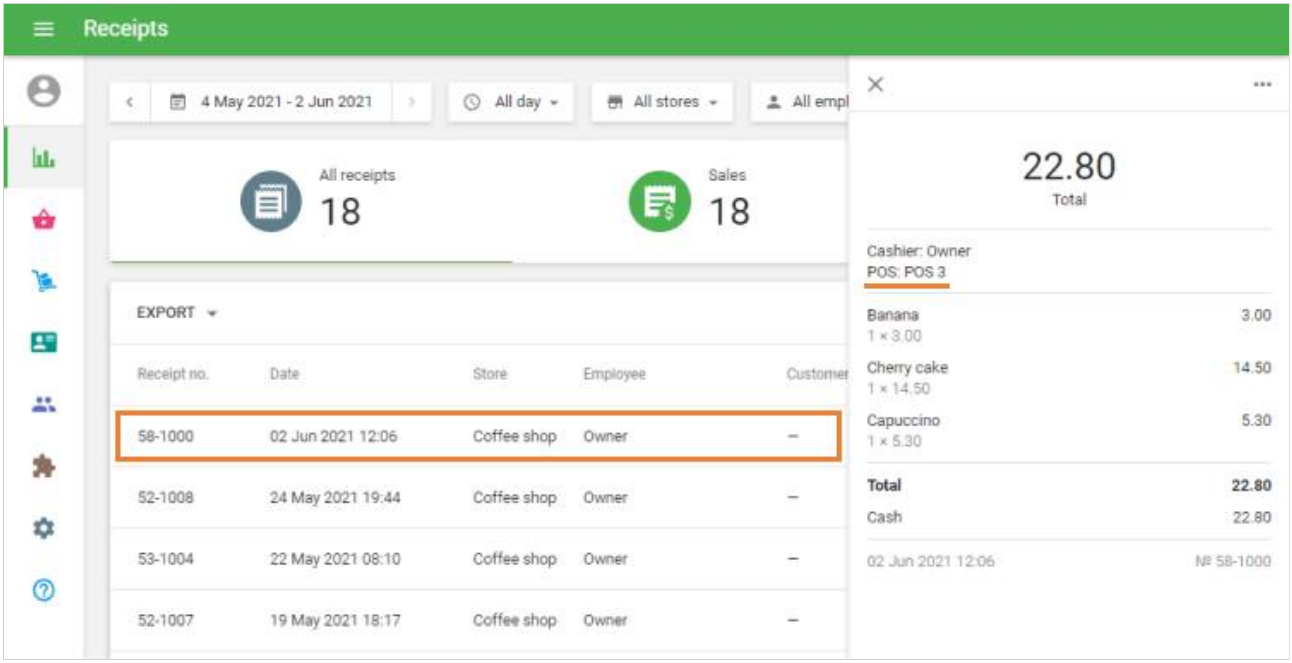
- All **open tickets are closed**.
- The **shift is closed** on the POS device.
- All **receipts are synced** with the Back Office.

To verify that all data is synced:

1. Go to the '**Receipts**' section in the Back Office.

2. Check the list of receipts.

3. Click on each receipt to view the details and confirm the **POS name**.

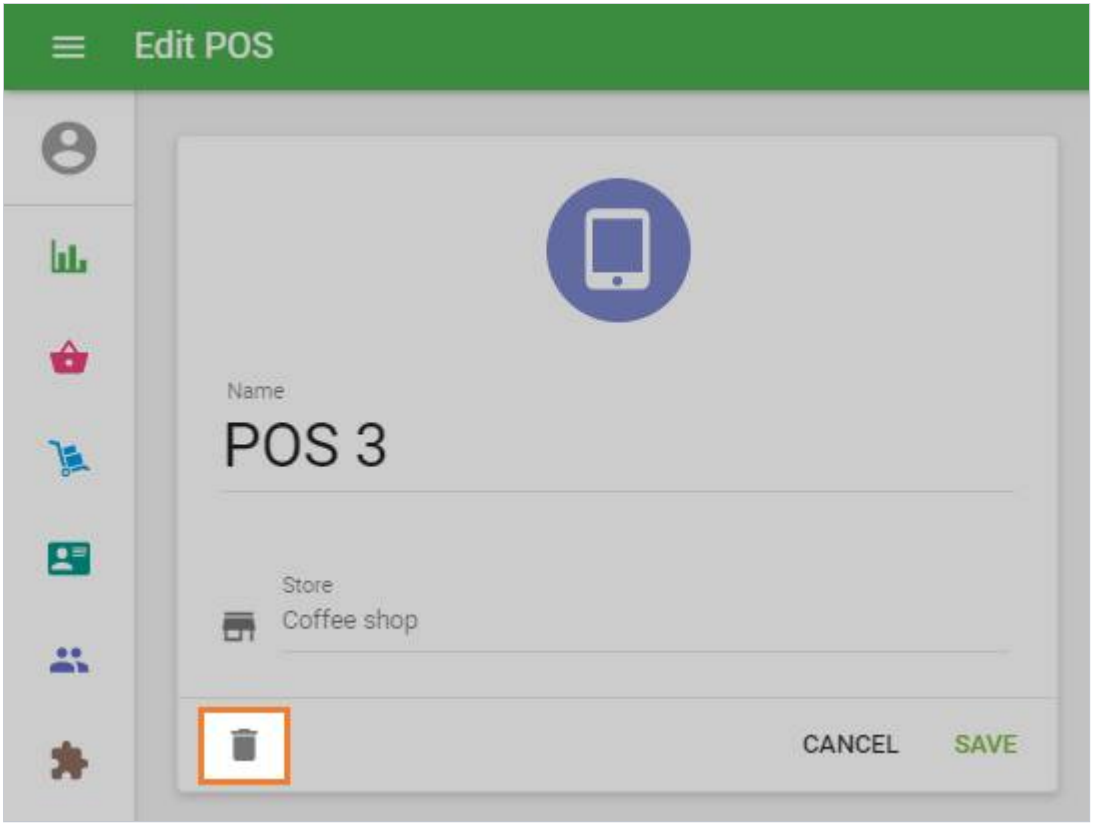


If some receipts are missing, connect your mobile POS device to the internet to complete synchronization.

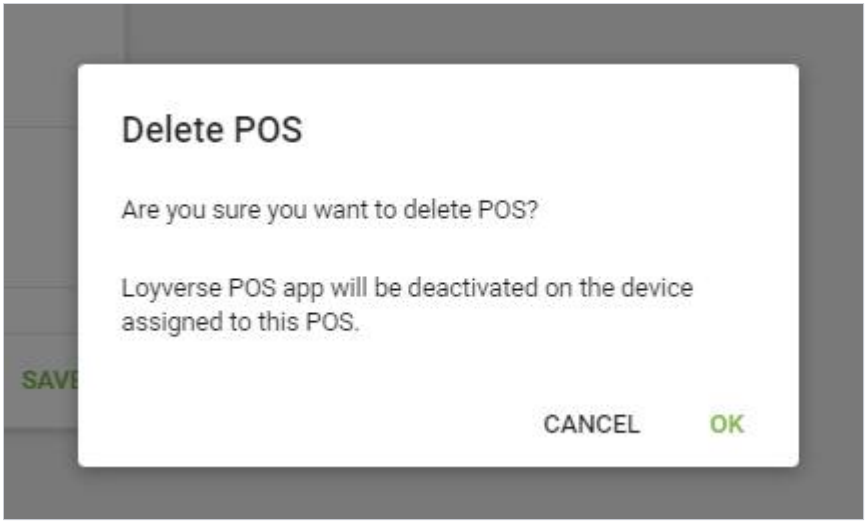
To delete the POS:

1. In the '**POS devices**' section, find the device and click **Edit**.

2. Click the **trash bin icon** to delete.



3. Confirm the action in the popup by clicking '**OK**'.



All **synced receipts** from the deleted POS will remain in your Back Office reports.

After deletion, the POS will no longer be usable on the device.

See also:

Setting Up Your Shop in Loyverse Back Office

How to Switch User Account to Different Employee in the Opened Loyverse POS

How to Create and Manage Multiple Stores under One Account

Video
https://www.youtube.com/watch?v=4lFpzwlHY2c

Loyverse POS allows you to manage multiple stores within a single account, giving you centralized control over sales, inventory, employees, and customers across your business network.

Adding a New Store

1. In the **Back Office**, go to **Settings** and click on '**Stores**'.
2. Click the '**Add Store**' button.
3. Fill in the store details such as Name, Address, Phone, VAT, and Description.

   Note: This information will appear on the store receipts.
4. Click '**Save**'.

Your new store will appear in the store list. You can now create and assign POS devices to this store.

Items Management Per Store

You can manage key item settings for each individual store:

- Open an item for editing.
- Scroll to the '**Stores**' section.
- Adjust **price**, **in-stock quantity**, and **low-stock notifications** per store.

When using the store filter in the item list:

- You'll only see items available in the selected store.
- Composite item ingredients relevant to the store will also be shown.
- The item list displays **store-specific price and stock values**.

Employee Access Control by Store

To manage which stores employees can access:

1. Go to '**Employee List**' and open an employee's profile for editing.

2. Find the '**Stores**' section at the bottom of the form.
3. Click the drop-down arrow to display your store list.
4. Select the store(s) the employee should have access to.
5. Click '**Save**'.

This feature is helpful when assigning cashiers or managers to specific store locations.

Sales Reports by Store

In the **Back Office**, go to the '**Reports**' section.

- Use the **store filter** to view reports for a specific store or all stores combined.
- Reports such as **sales summary**, **sales by item, category,** or **employee** can be filtered by store for detailed insights.

Customer Management Across Stores

- You can **manage your entire customer base** from the Back Office across all stores. This includes creating, editing, or deleting customer profiles.
- Customers can **earn and redeem loyalty points** in **any store** connected to your account.
- While you can **view and edit customer profiles** from any store at the POS, you can **only track their purchase history for the current store**.
- This centralized management supports consistent service and loyalty benefits across all your locations.

Loyverse's multi-store management ensures consistent and efficient operations across your business locations.

See also:

Setting Up Your Shop in Loyverse Back Office

How to Add Items and Categories

How to Add an Employee in Loyverse POS

Sales Report by Category in Loyverse POS

How to Sign Up a Customer in Loyverse POS

Paid services

How to Use Add-on Services of Loyverse POS

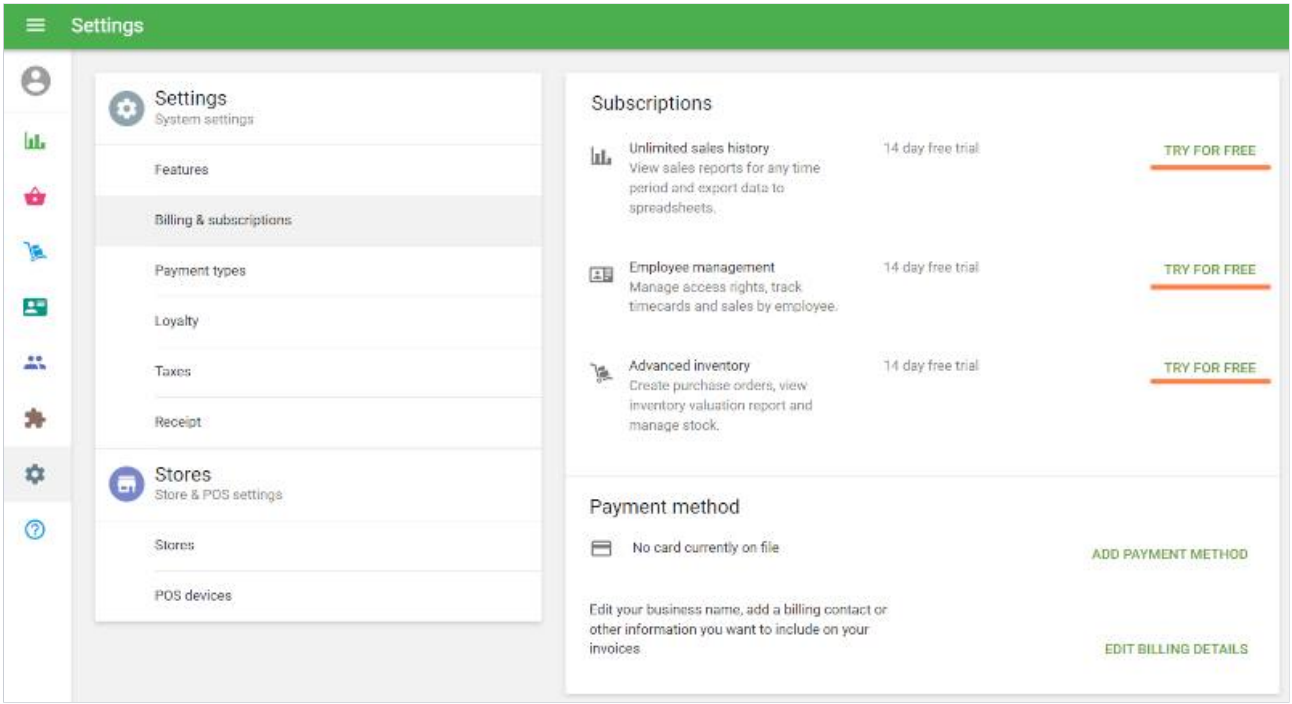
Loyverse POS offers paid services to enhance your business operations, including subscriptions to: Unlimited Sales History, Employee Management, and Advanced Inventory. This guide will walk you through starting free trials, activating subscriptions, managing payment methods, and unsubscribing if needed.

1. Trial Period

All paid services come with a 14-day free trial. No credit card is required to start the trial.

How to Start a Trial:

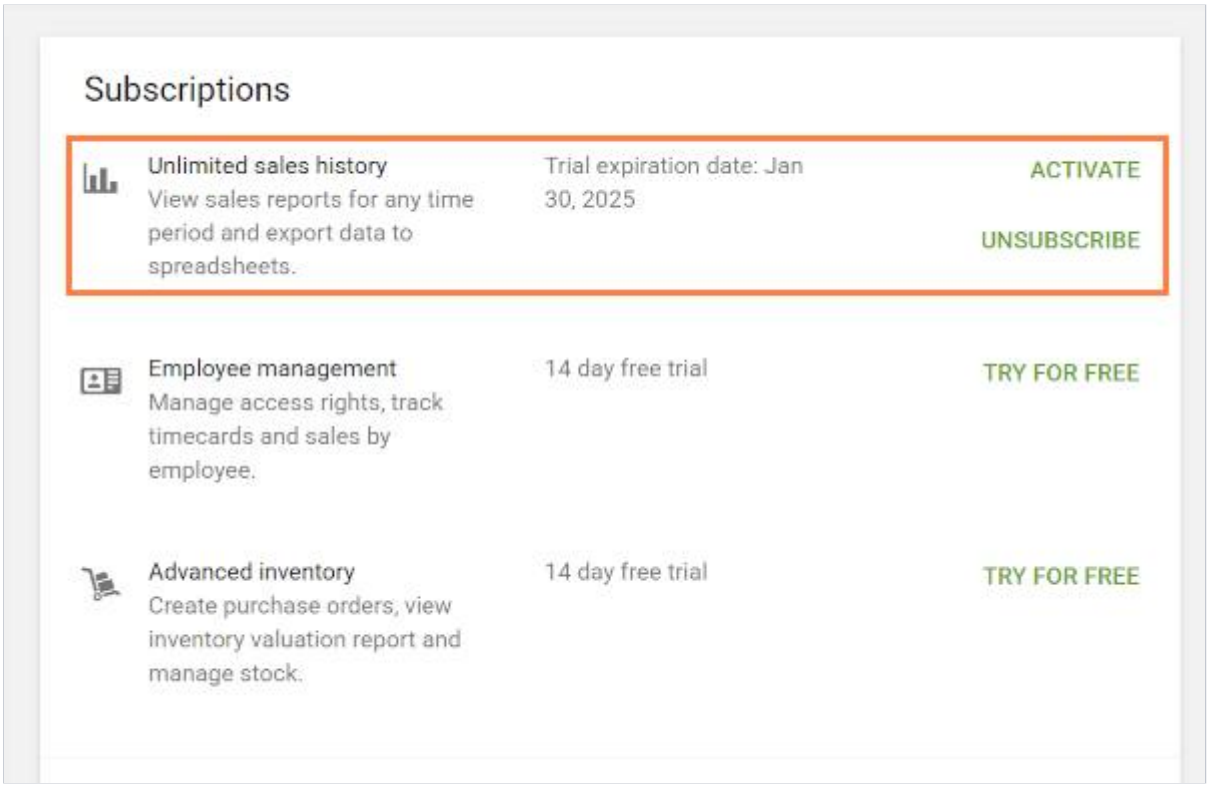
- Log in to your Back Office.
- Navigate to **Settings > Billing & Subscriptions**.
- Click the '**Try for free**' button for Unlimited Sales History, Employee Management, or Advanced Inventory.



Service-Specific Notes:

- **Unlimited Sales History:** A terms and conditions pop-up will appear. Click 'Start free trial' to activate the trial.
- **Employee Management:** Add employees in the Employees list and agree to the terms to start the trial.
- **Advanced Inventory:** Click 'Start free trial' on the pop-up window to activate the trial.

During the trial period, the expiration date will be displayed in the Back Office. You can cancel at any time by clicking the 'Unsubscribe' button. The service will remain active until the trial ends, at which point it will be automatically canceled.

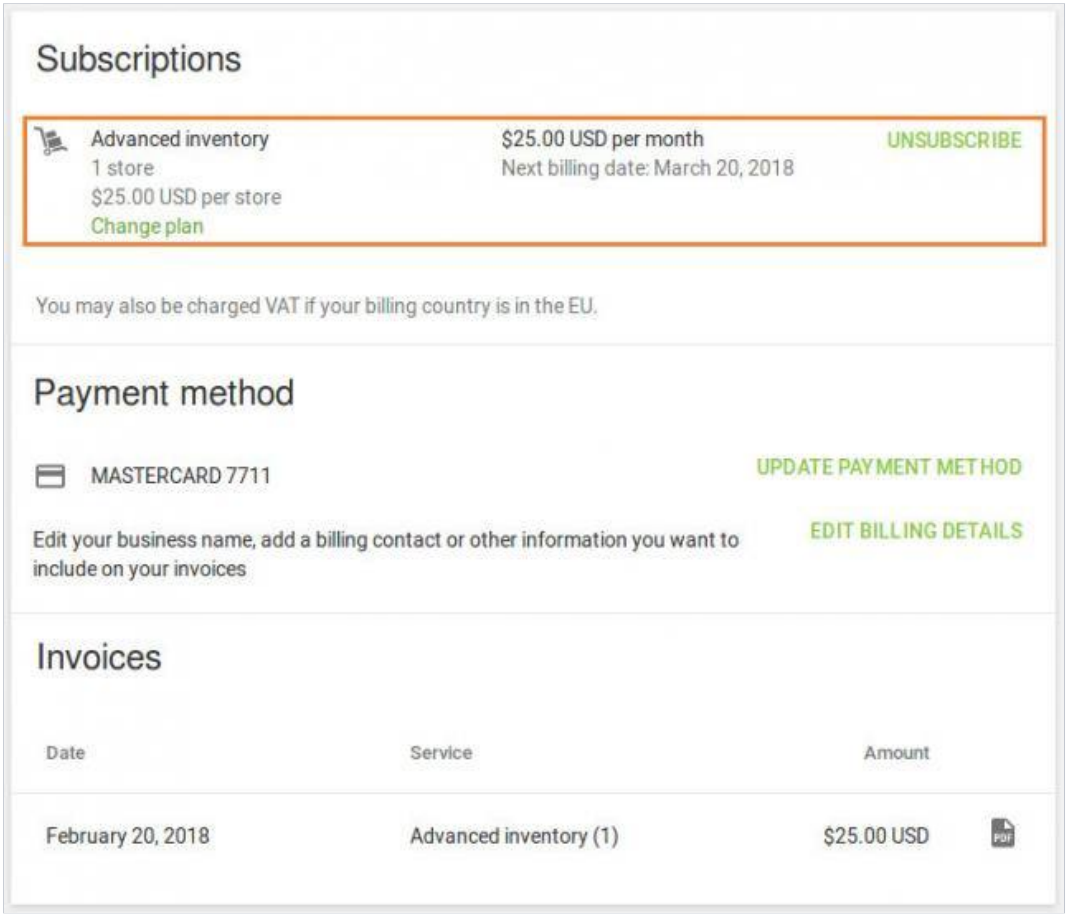


2. Activating Subscriptions

You can activate your subscription at any time during the trial (the payment will be taken only after 14 days have passed):

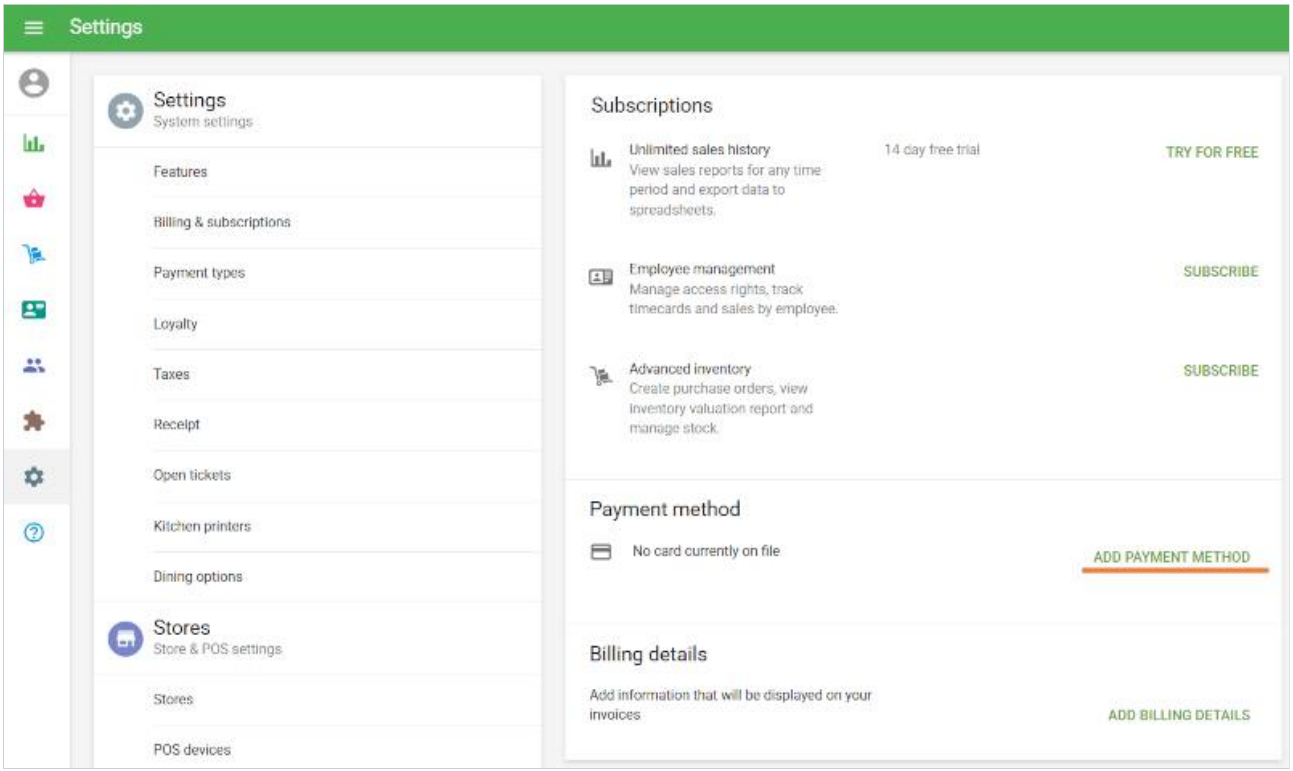
- Go to **Billing & Subscriptions** in the Back Office.
- Click '**Activate**' for the desired service.
- Choose your pricing plan in the pop-up window and click '**Continue**.'
- If you haven't added a payment method, you'll be redirected to do so.

After completing the subscription process, details of your active subscription will appear in the **Subscriptions** section.

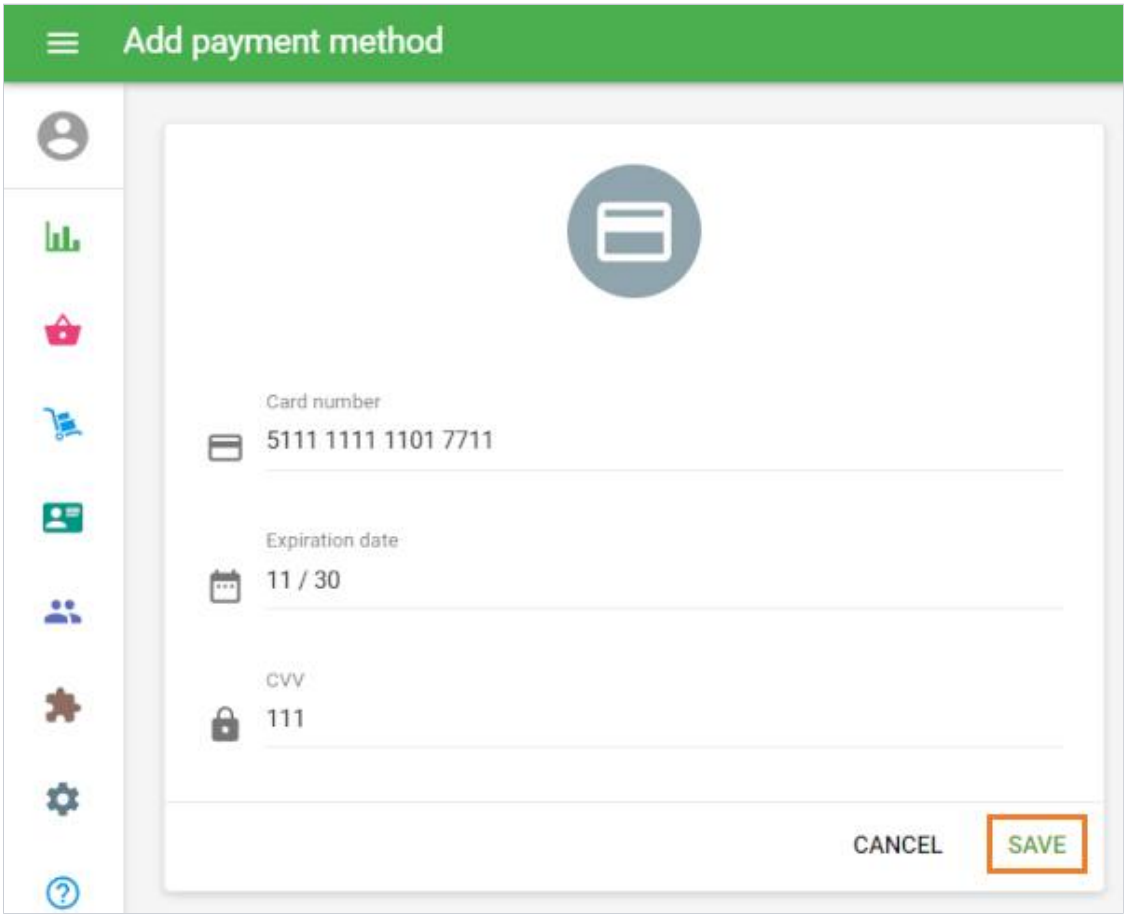


3. Adding a Payment Method

Go to **Billing & Subscriptions** and click '**Add payment method**.'



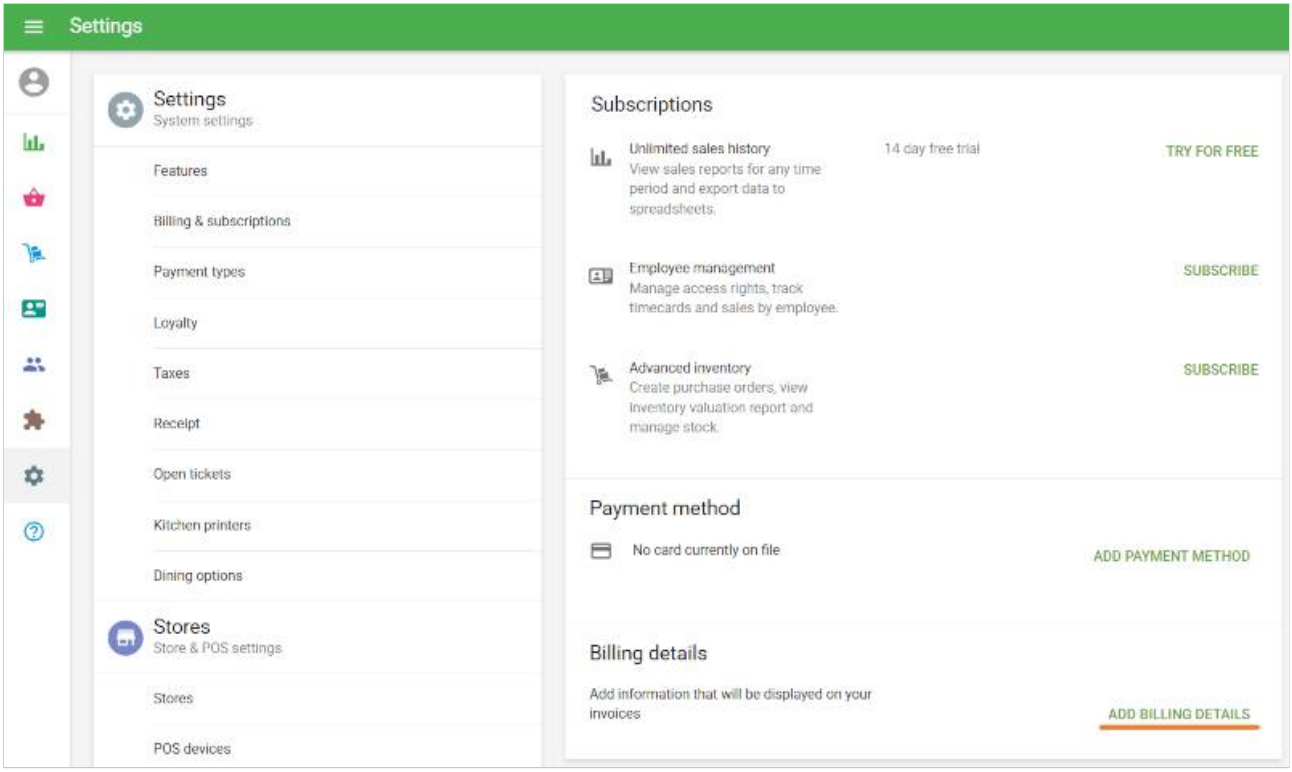
Enter your card details in the required fields and click '**Save**.'



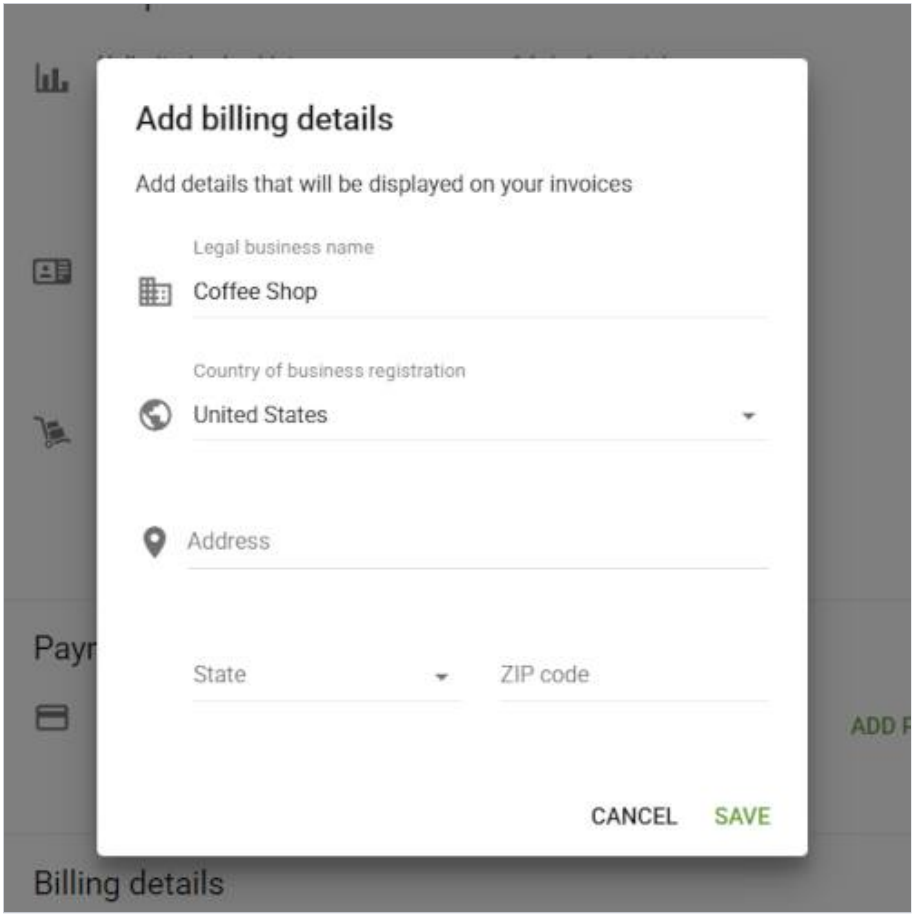
If the information is correct, your card will be added as a payment method.

4. Billing details

Click '**Add billing details**' to provide details that will appear on your future invoices.



Fill in the legal information of your business.



Note that the **Country of business registration** refers to the place where your business is located, not the country where the card is issued.

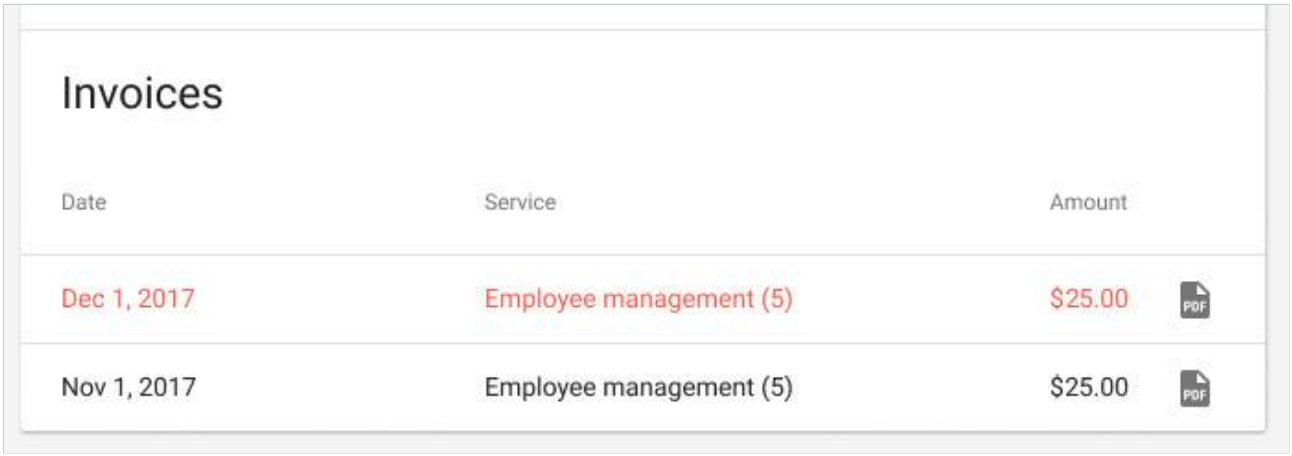
If your business is registered in the **UK and EU countries**, you have the option to provide **VAT number**.



Make sure to **save** the information.

5. Payments for Subscriptions

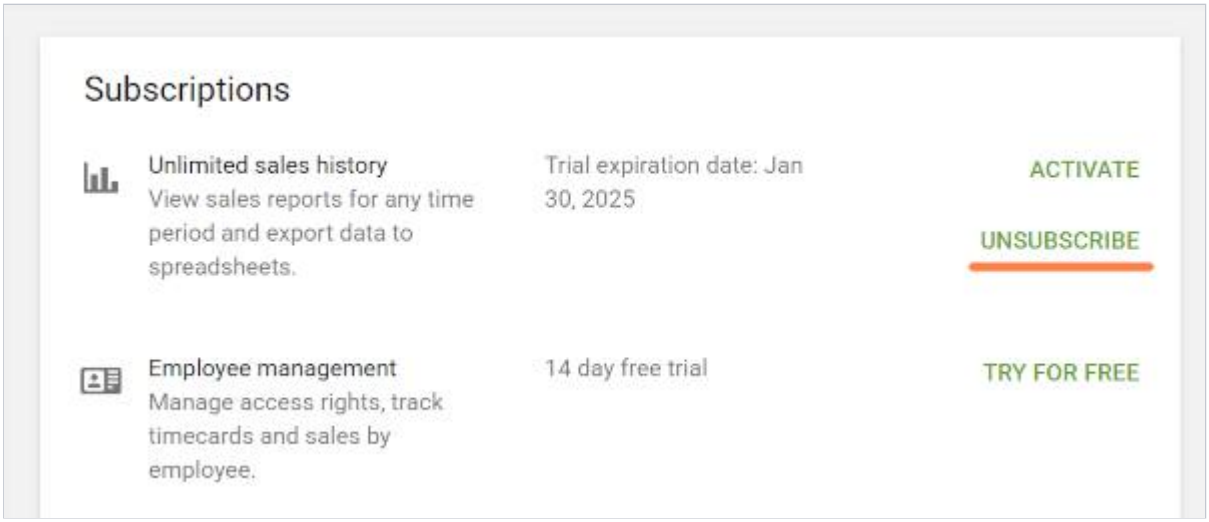
Subscription fees will be automatically charged to your saved payment method.
Notifications about future payments, paid invoices, and failed attempts will be sent to the account email address.
Payment history and warnings about failed payments can be found in the '**Invoices**' section.
Click on the PDF icon to download your invoice.



VAT may be applied based on your billing information.

6. Unsubscribing from Services

To unsubscribe, go to **Billing & Subscriptions** and click **'Unsubscribe**' for the desired service.



- **Employee Management**: All employees except the owner will be deleted. Alternatively, you can delete employees manually and pay only for the remaining ones.
- **Advanced Inventory**: A warning will inform you about losing access to advanced inventory features.

After unsubscribing from Unlimited Sales History or Advanced Inventory, you will continue to have access to these services until the end of the current paid period. If you unsubscribe from Employee Management, prorated credits will be issued to your account and can be used in the future to pay for addons.

7. Locked Back Office

- **Trial Users:** If no action is taken after the trial ends, the Back Office will lock immediately. You need to subscribe or cancel the trial to unlock it.
- **Subscribed Users**: If an invoice is unpaid, you'll have 7 days of access before the Back Office is locked.

Even in a locked state, you can access the Stores, POS Devices, or Employee list sections to manage or delete stores or employees.

8. Subscription Changes and Credits

- If you **reduce the number of employees or stores**, or **unsubscribe mid-cycle from the Employee management**, unused amounts will be credited to your Loyverse POS account for future use.

- Switching **from the annual to the monthly plan** will take effect after the current annual billing period ends.
- If you opt to switch **from the monthly to the annual plan**, you will receive a prorated credit reflecting the remaining billing period of your monthly subscription. This credit will be applied to partially cover the invoice amount for your annual plan.

By following these steps, you can easily manage Loyverse POS's paid services to suit your business needs.

Receipts

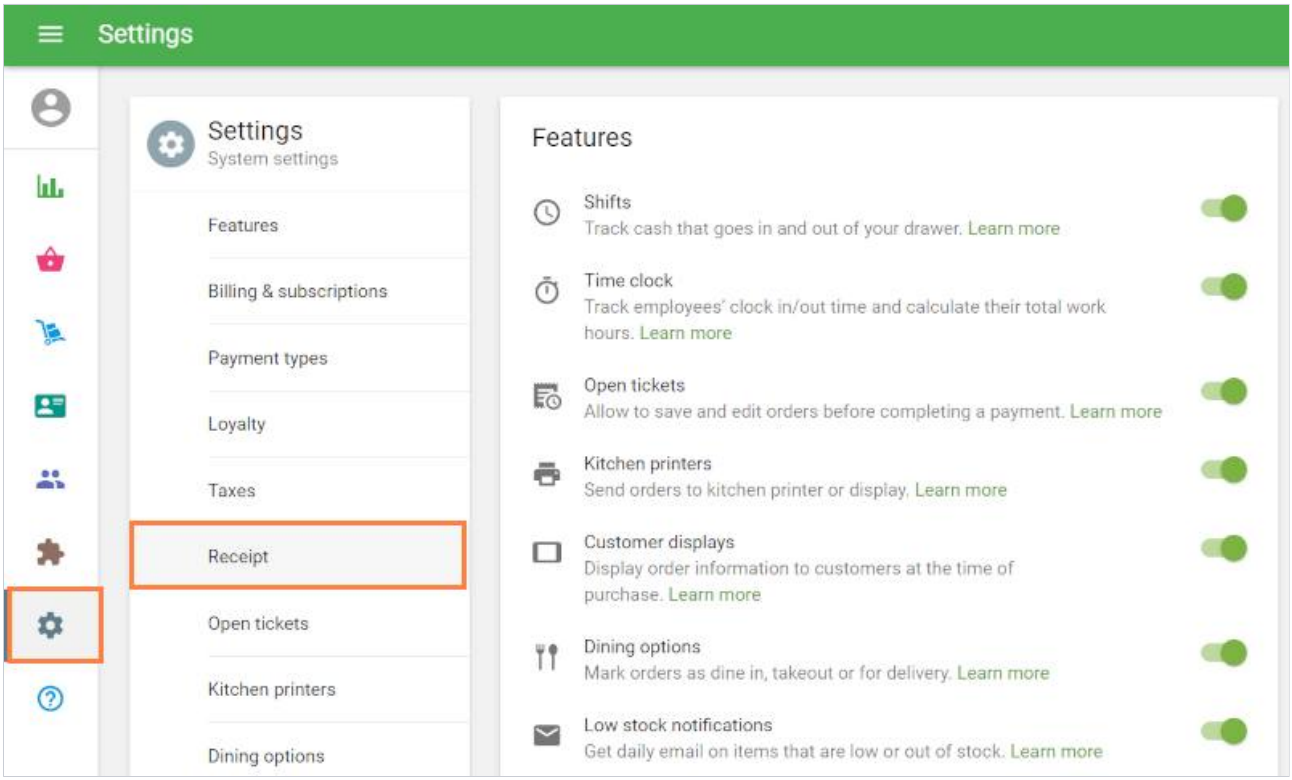
How to Add Text to Printed Receipts in Loyverse POS

Adding custom text to the header or footer of your printed receipts is a great way to personalize communication with your customers. You can include details like promotional messages, store policies, or other information.

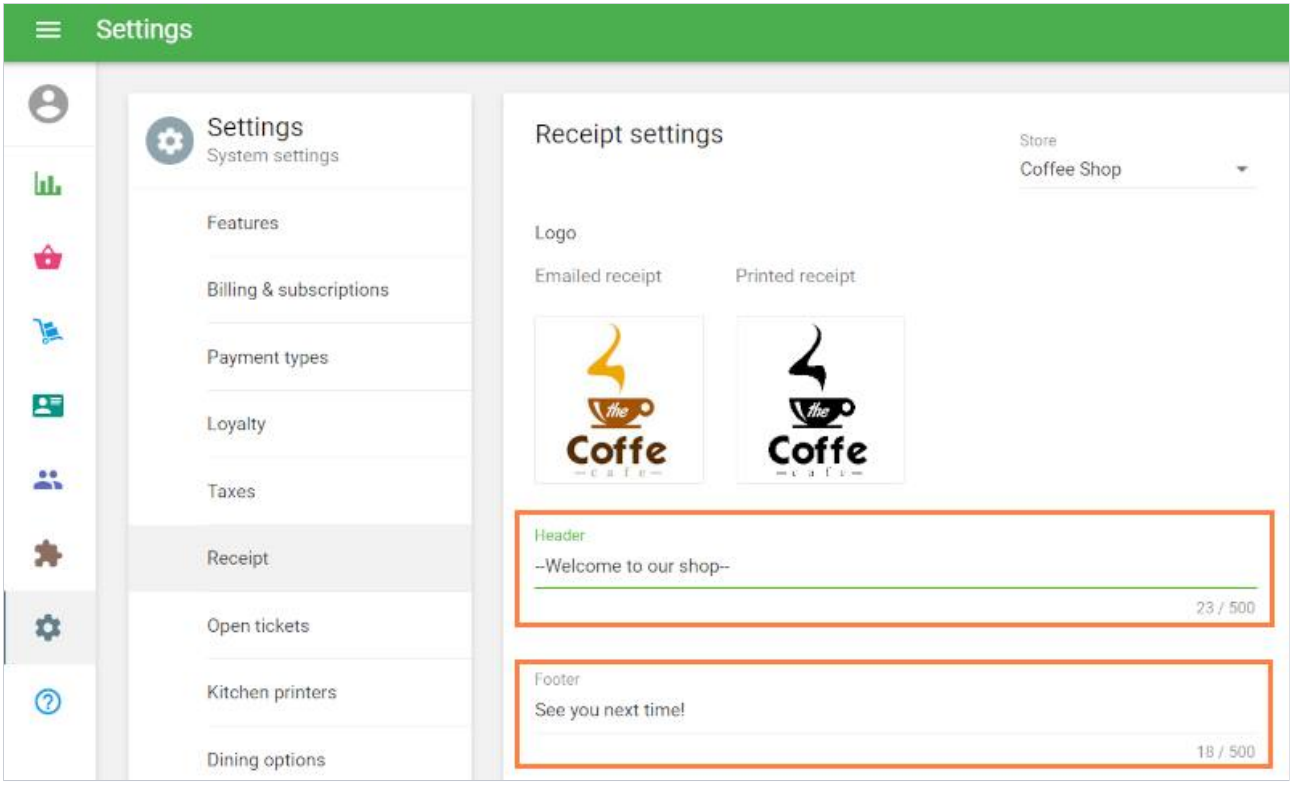
Follow these steps to add text to your receipts:

Access Your Back Office: Log in to your Loyverse Back Office.

Navigate to Settings: In the main menu, select 'Settings' and then choose the 'Receipt' section.

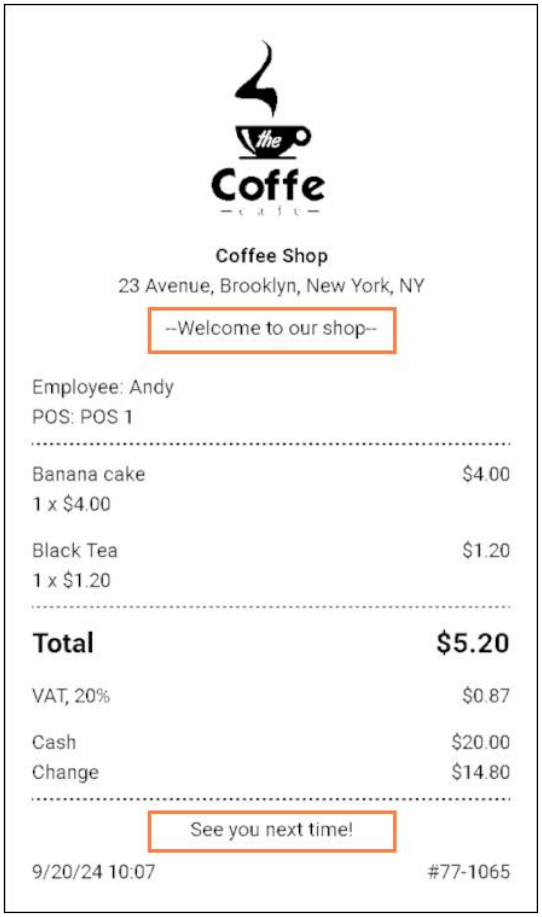


Customize the Header or Footer: In the 'Header' and/or 'Footer' fields, enter the text you want to appear on your printed receipts.



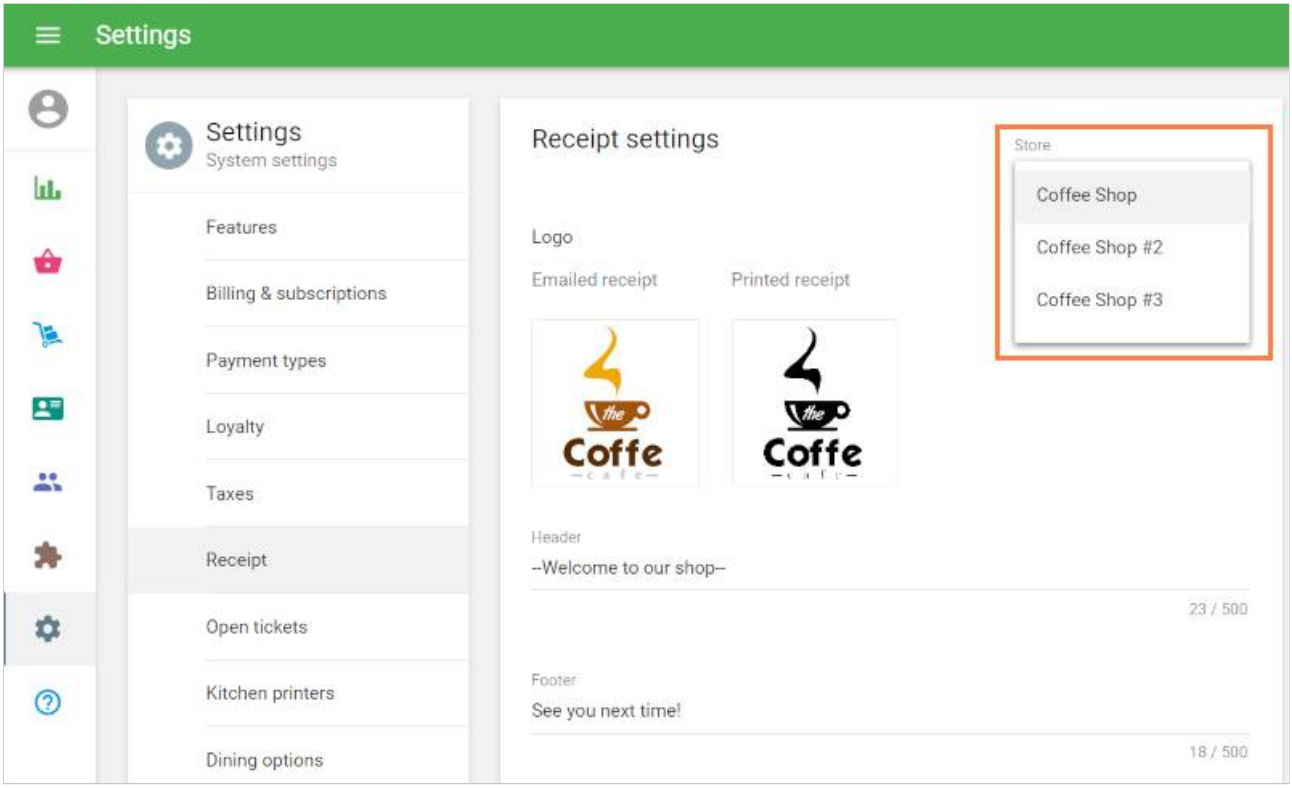
Save Changes: After entering your custom message, make sure to save the changes.

This text will now be printed on all receipts and will also appear in emailed receipts.



Note: The name and address of your store printed on the receipt are taken from the 'Store' section in the Settings. Ensure that your store information is accurate there.

If you manage **multiple stores**, remember to set the receipt text for each store individually by using the store selector located at the top right of the page.



Your message will now be included on every receipt, enhancing the experience for your customers.

See also:

How to Add Logo to the Receipts

How to Add Logo to the Receipts

Adding a logo to your receipts helps personalize and brand your business communications. You can upload different logos for **printed** and **emailed** receipts directly from the **Back Office**.

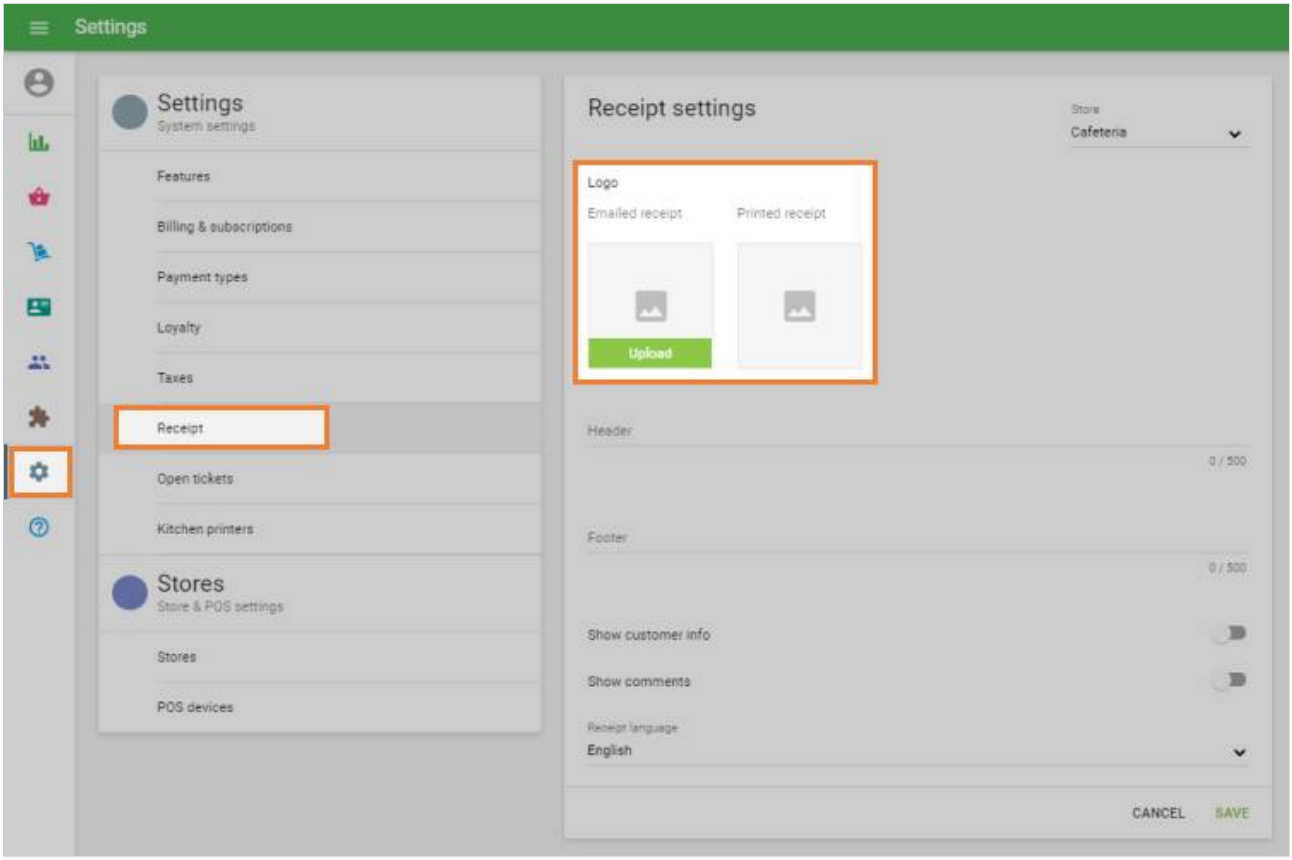
Steps to Upload a Logo

Log in to the **Back Office**.

Navigate to **Settings → Receipts**.

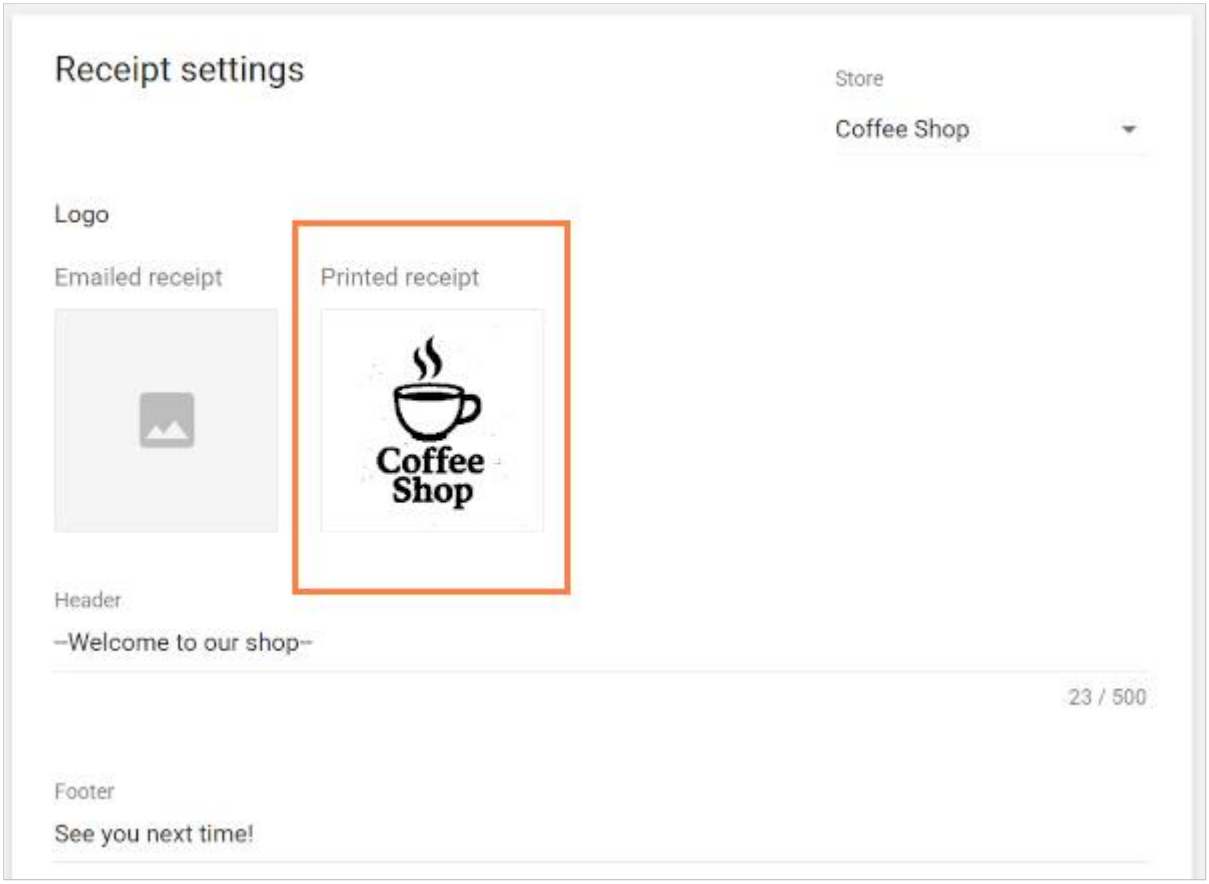
You will see two upload sections:

- **Logo for Emailed Receipts**
- **Logo for Printed Receipts**



Logo for Printed Receipts

Upload an image file (preferably black and white) for your **printed receipts**.



If you upload a color image, the system will automatically convert it to **black and white**.

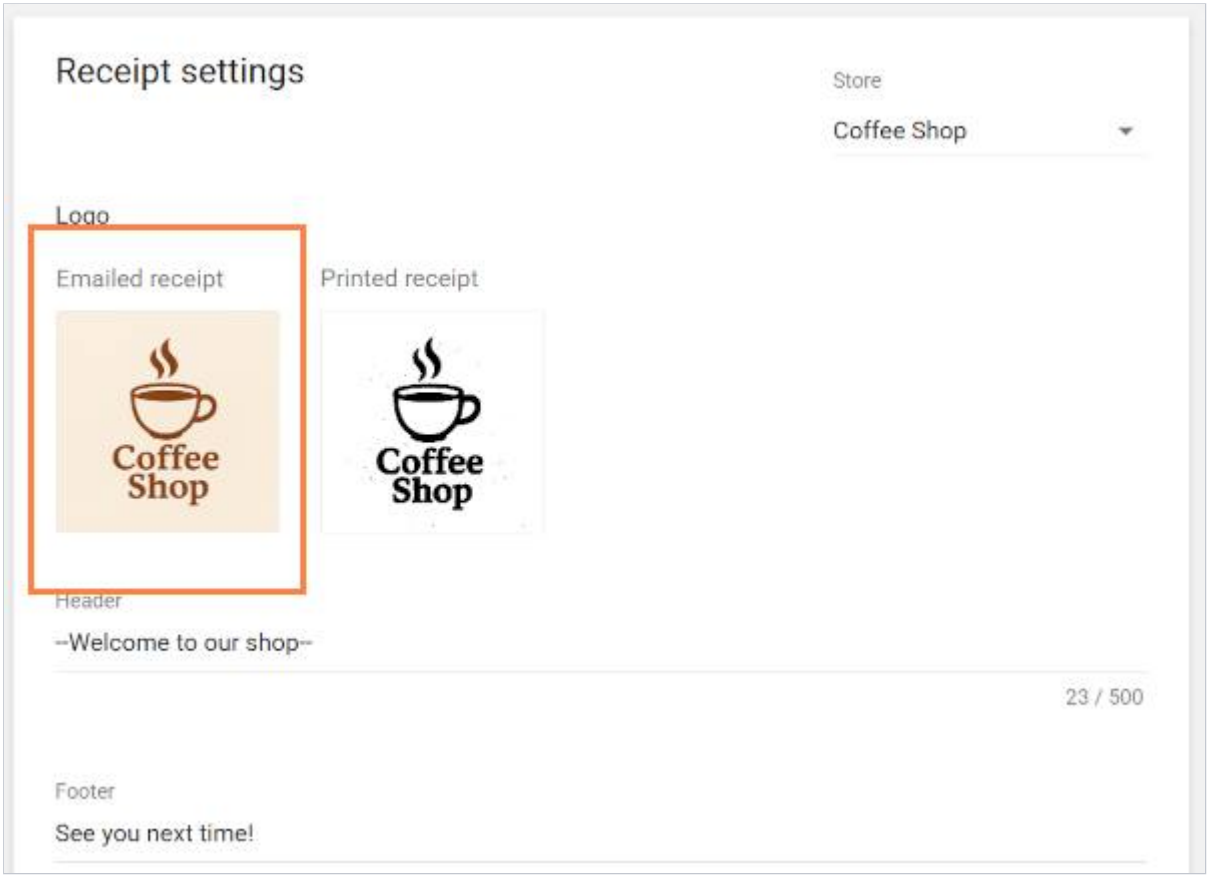
The logo will appear at the **top** of each printed receipt.



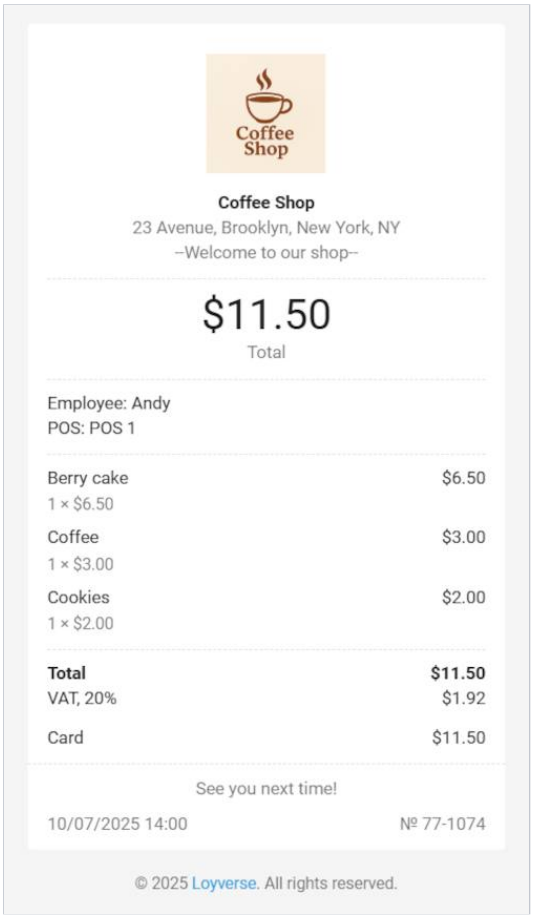
Note: Your logo **will not appear** on printed receipts if **text mode** is enabled in your **Advanced Printer Settings**.

Logo for Emailed Receipts

Upload a **color image** for better appearance in **email receipts**.



The logo will be displayed in the email that your customer receives after a sale.



Multi-Store Setup

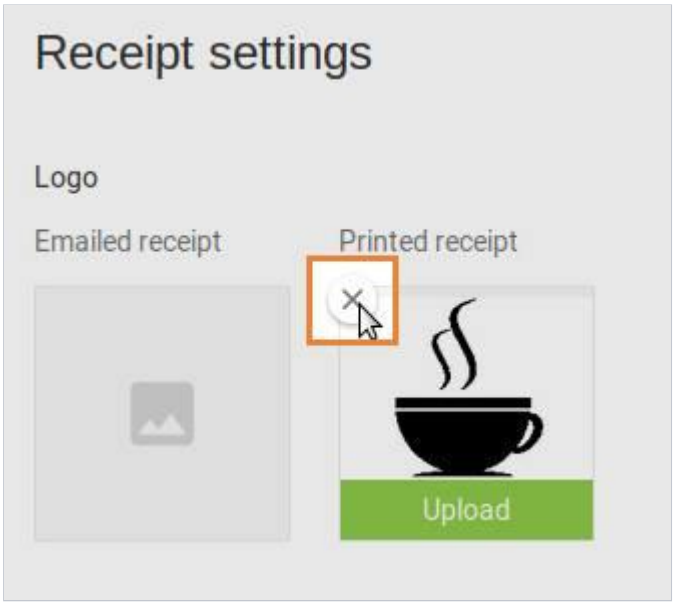
If you manage **multiple stores**, repeat the steps above for each store:

- Use the **drop-down menu** at the top-right of the 'Receipt' settings screen to select a store.
- Upload logos separately for each store.
- Don't forget to **save changes** after each upload.

To Remove a Logo

If you no longer wish to display a logo:

Go to the logo section for the relevant store and click the **delete icon**.



Save your changes.

Now, your printed and emailed receipts will include your store's logo, giving them a professional and branded look.

See also:

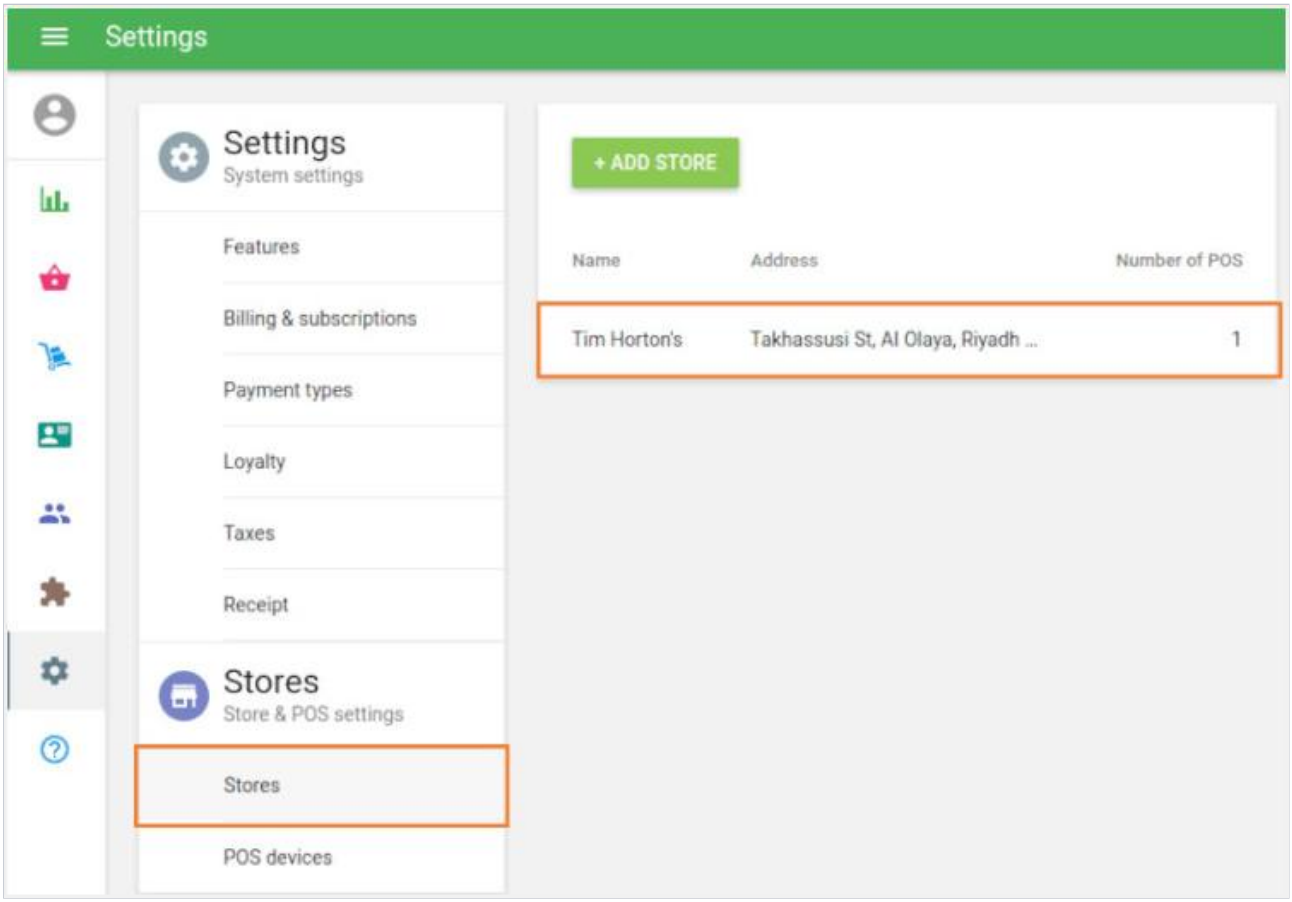
How to Add Text to Printed Receipts in Loyverse POS

How to add QR code in receipts for SA

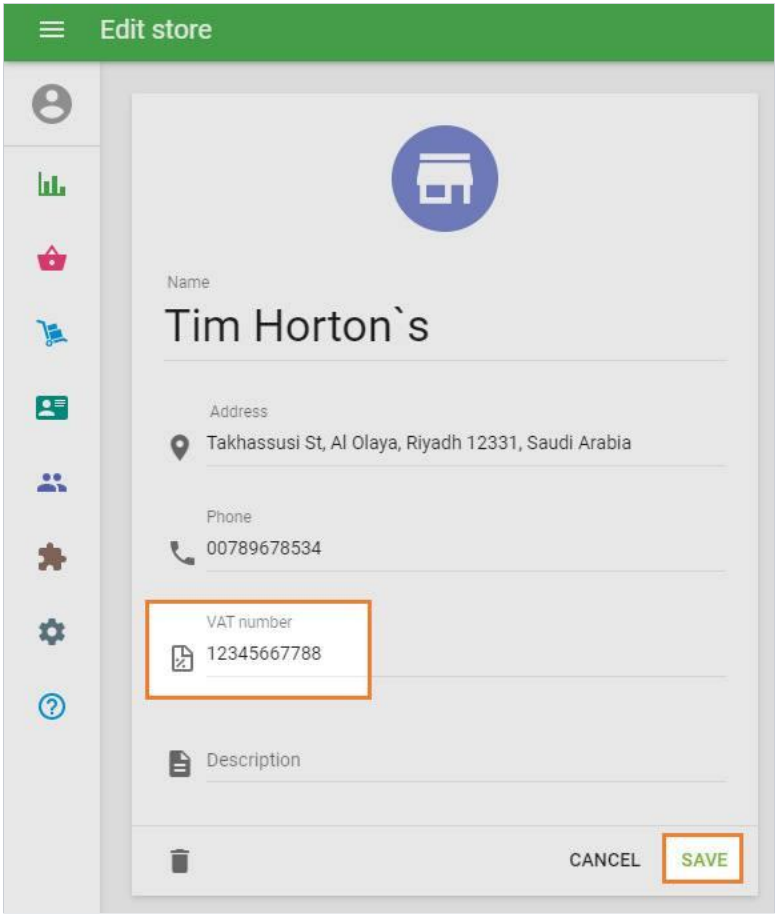
This feature is available on iOS devices on Loyverse POS 2.43 and on Android devices on Loyverse POS 2.21 or higher versions.

It is available only for users in Saudi Arabia.

Log in to the Back Office, click the ‘Settings’ menu, and then ‘Stores’.



Open store form for editing. Enter your VAT number and save your changes.



After that, the QR code will appear at the bottom of the printed and emailed receipt, and the VAT number at the top of the receipt.



The QR Code contains the 5 required fields: Store name, VAT Registration Number, Time and Date, VAT Total, and Receipt Total.

Note: The QR Code is encoded in Base64 and in Tag-Length-Value (TLV) format as per requirement by ZATCA (Zakat, Tax and Customs Authority). To see the encoded information, you need to use a decoder.

Note: If a customer with a VAT number is added to the receipt, the receipt title changes from the "Simplified tax invoice" to the "Tax invoice".

Payment types, Currency

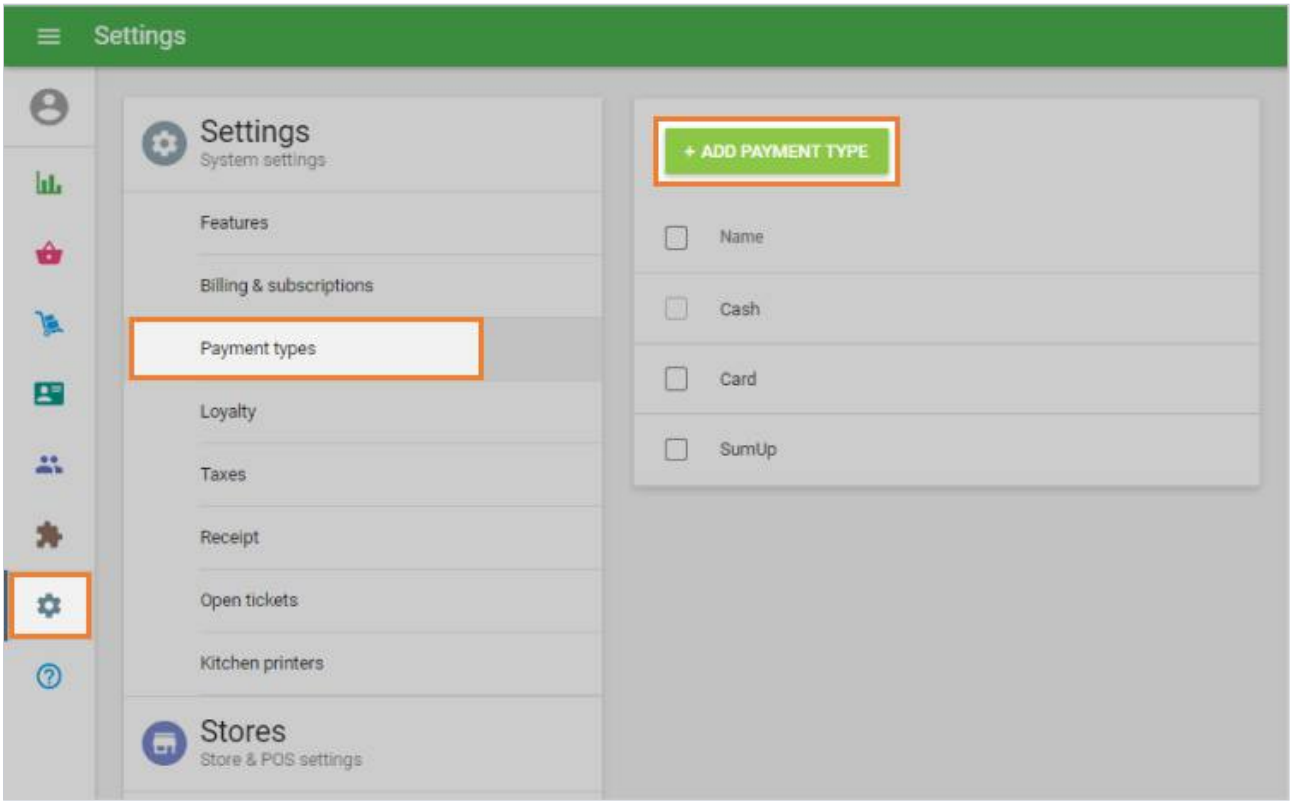
Configuring Payment Types in Loyverse POS

When you launch **Loyverse POS** for the first time, it comes with two default payment types: **Cash** and **Card**.
If you accept other payment methods and want detailed reports by payment type, you can easily add or configure them in the **Back Office**.

1. Adding a New Payment Type

Log in to the **Back Office**.

Open the **Settings** menu → select **Payment types**.



Click **Add payment type**.

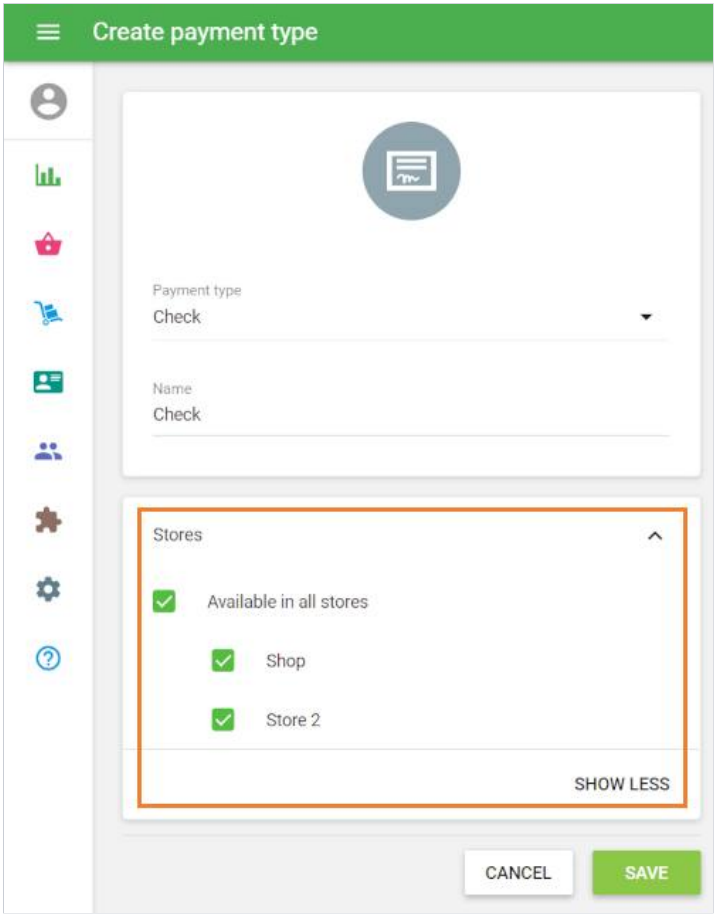
In the **Add Payment Type** window:

- Select a payment type from the drop-down list.
- Enter a **custom name** that will appear in reports.
- Note: **Cash** is the default payment type and cannot be changed.

Click **Save**.

2. Managing Payment Types for Multiple Stores

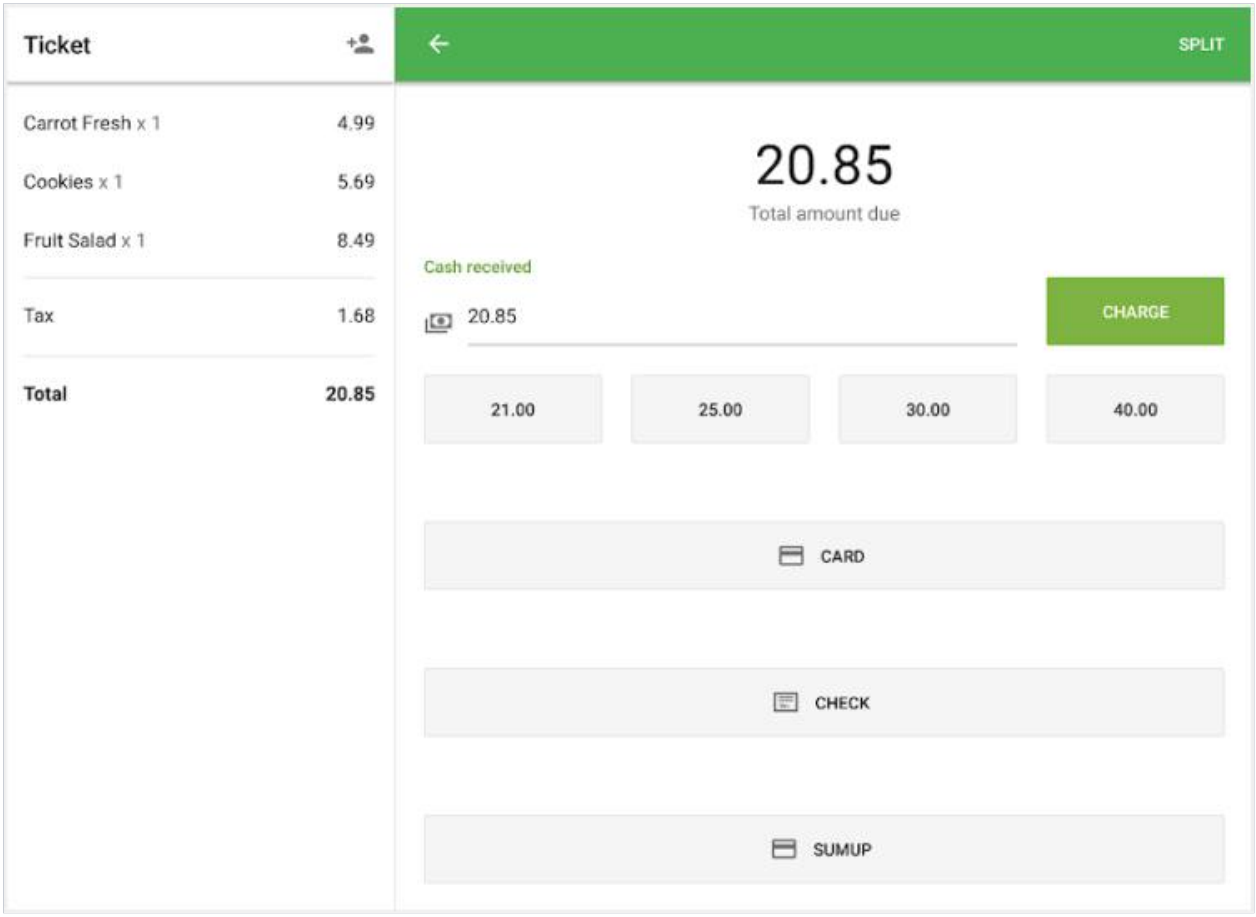
If your account has **multiple stores**, you can control which payment types are available at each store.



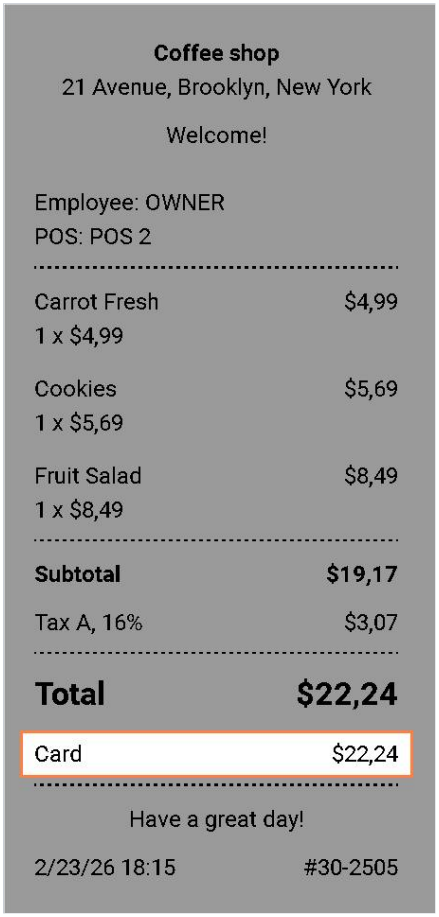
This allows you to customize accepted payment methods depending on store policies or regional requirements.

3. Using Payment Types in the POS App

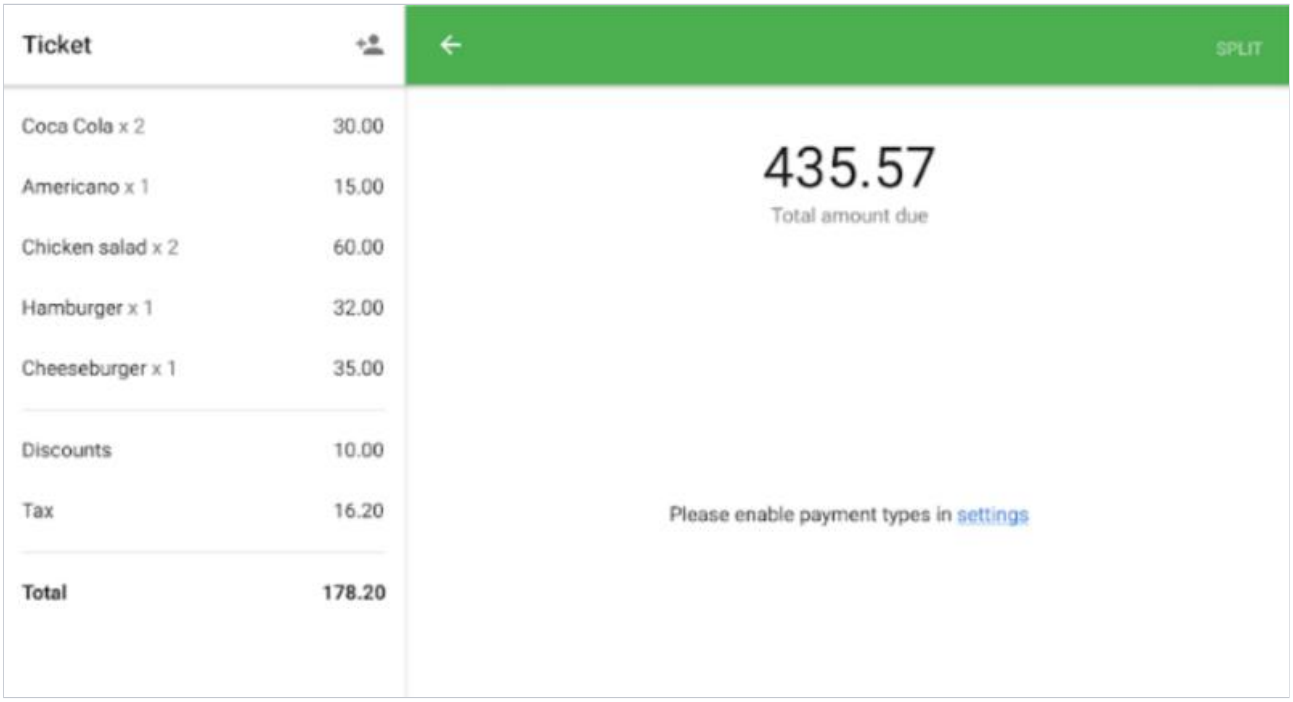
At the final stage of a sale in the **Loyverse POS app**, select the appropriate payment type.



The chosen payment type will be displayed on the **customer receipt**.

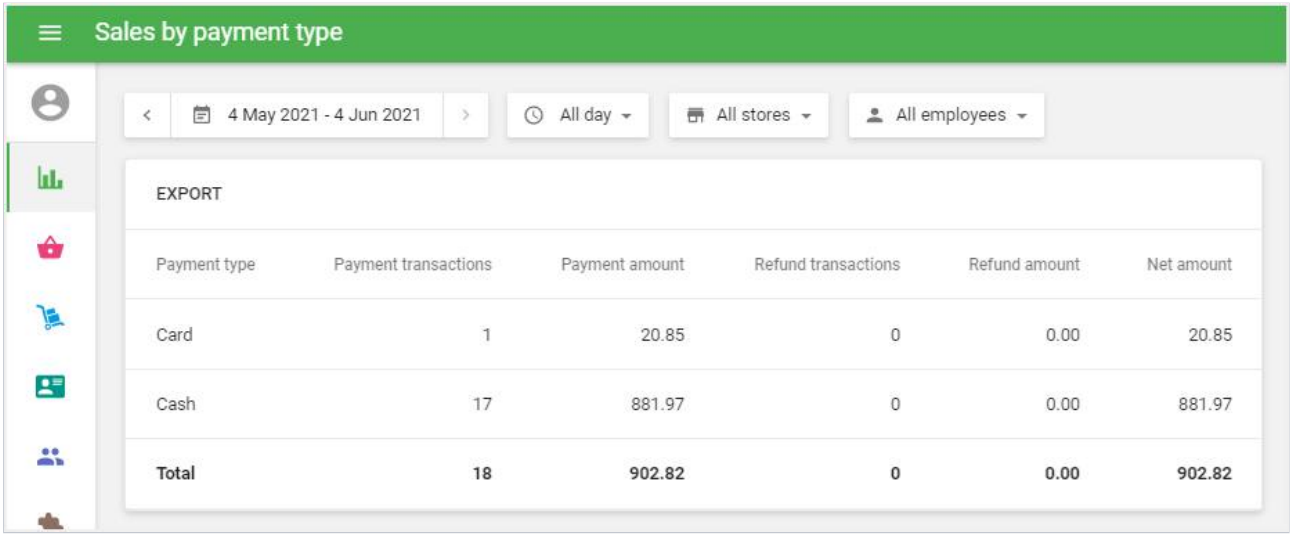


If no payment types are enabled for a store, the POS will display a message prompting you to enable them in the Back Office.



4. Reports by Payment Type

In the **Back Office**, open **Reports → Sales by Payment Type** to view sales data grouped by payment type.



Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	1	20.85	0	0.00	20.85
Cash	17	881.97	0	0.00	881.97
Total	**18**	**902.82**	**0**	**0.00**	**902.82**

This helps you track customer preferences and analyze revenue by payment method.

5. Editing or Deleting Payment Types

You can rename or delete a payment type in the Back Office at any time.

Historical data will remain unchanged:

- Receipts synchronized before the change will continue to show the **original name of the payment type** used at the time of purchase.

With payment type configuration, Loyverse POS gives you the flexibility to track sales by different payment methods, ensuring more accurate reporting and better business insights.

See also:

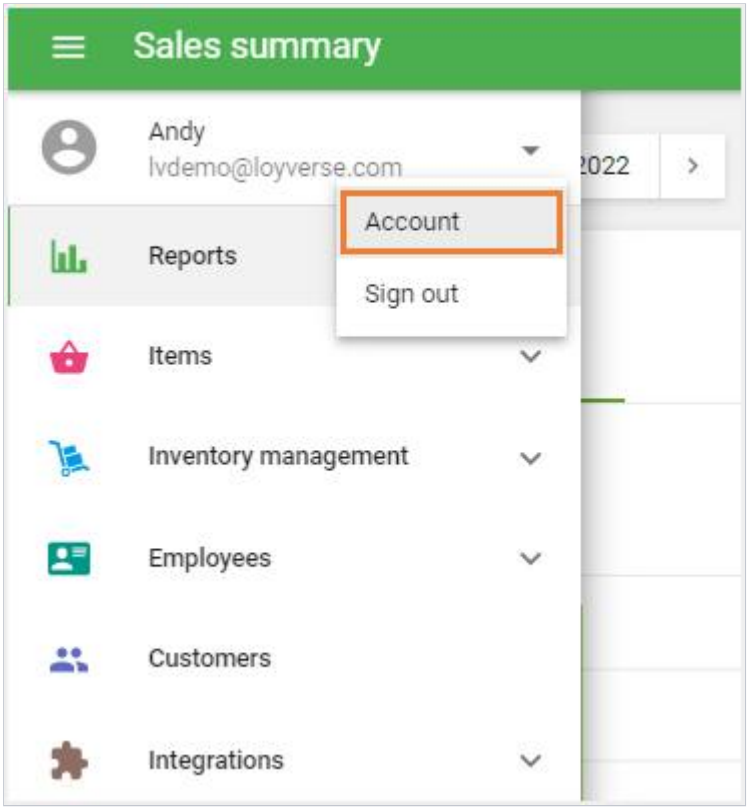
How to Work with Credit Card Payments

How to Set the Currency

By default, Loyverse sets your account currency based on your country of registration. However, the account owner can change it at any time.

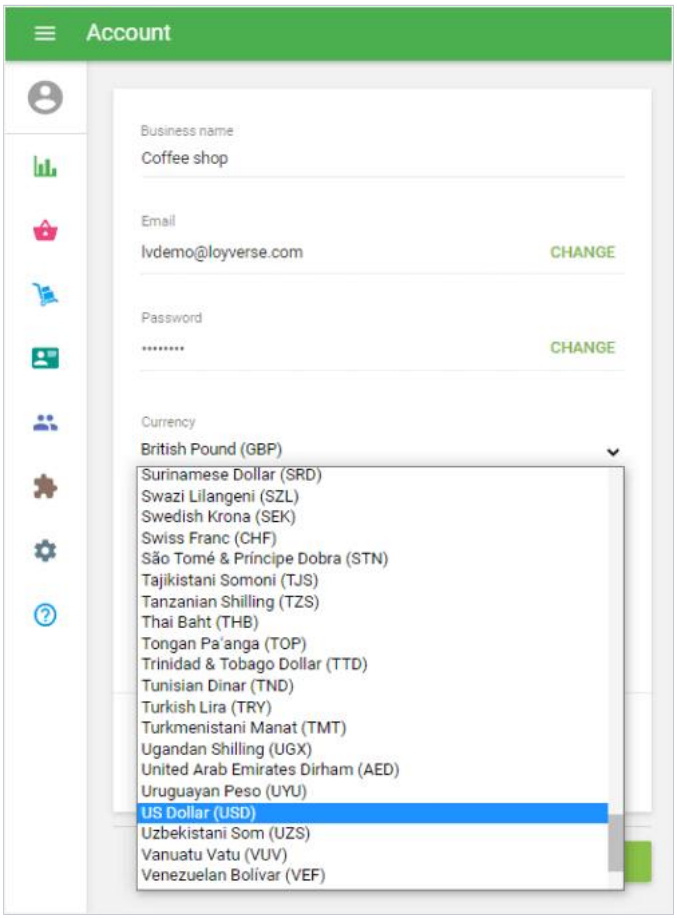
1. Open the Account Settings

In the Back Office, click the '**Account**' button in the main menu.



2. Select the Currency

In the '**Currency**' field, choose your desired currency from the drop-down list.



Note: Changing the currency will also adjust the currency format for your account (for example, displaying decimals or not, depending on the currency's standard).

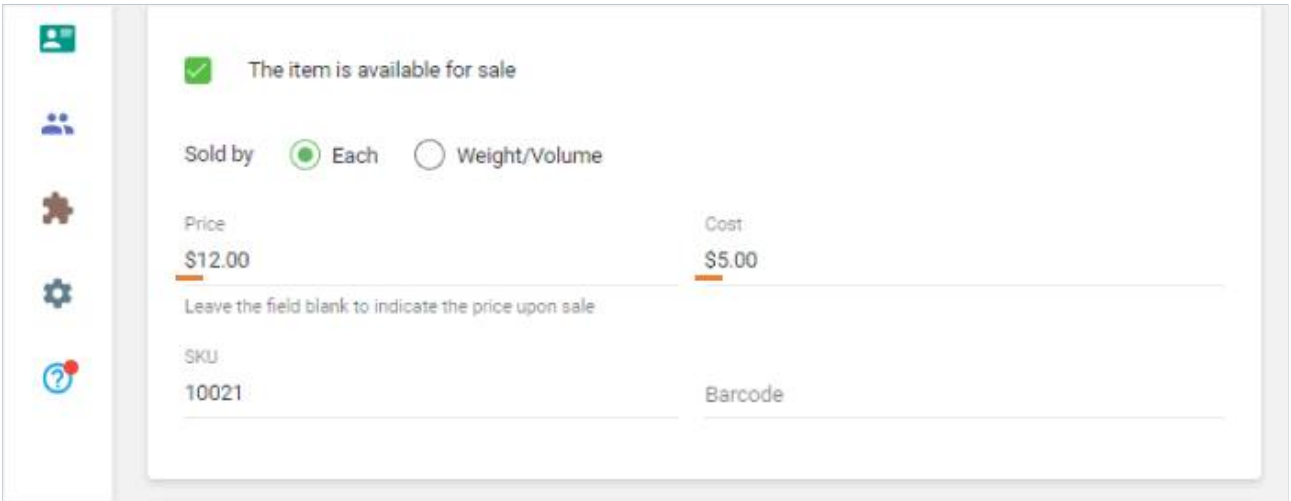
3. Save the Changes

Click '**Save**' to apply the new settings.

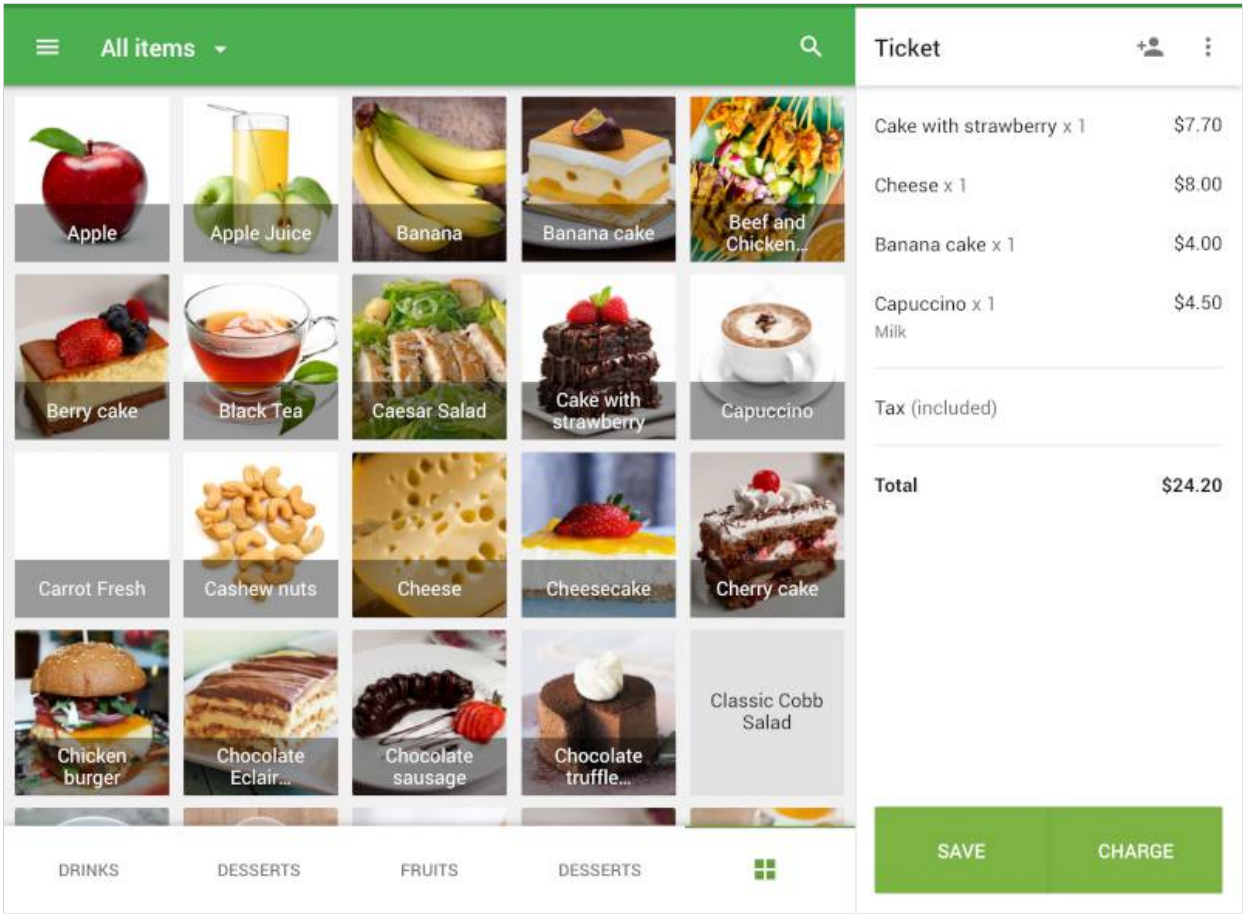
Where the Currency Appears

Once updated, the new currency symbol or name will be shown in:

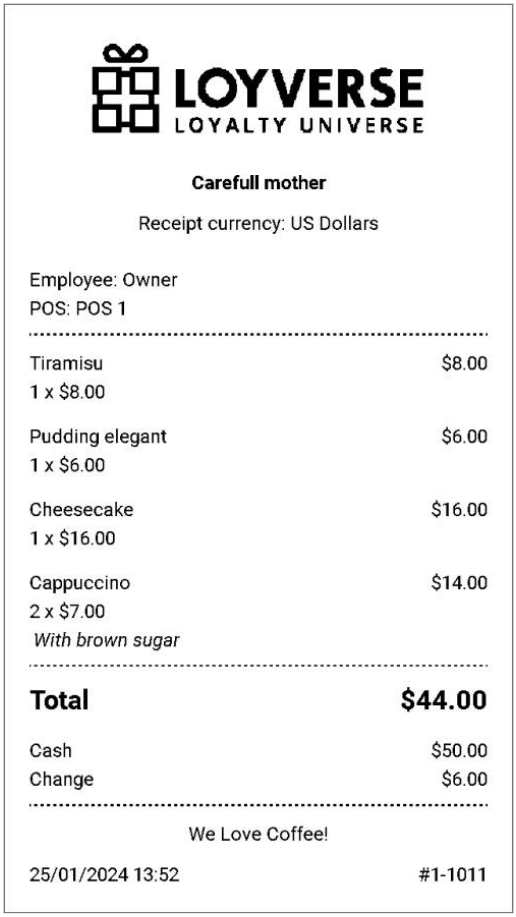
- The **Reports** section of the Back Office
- **Price** and **Cost** fields in the Back Office



- All monetary values in the POS, Dashboard, and CDS



- Printed **receipts** and **bills**



Important

If you change the currency, you must **sign out** of Loyverse POS and **sign in again** on each POS device to apply the changes.

See also:

Setting Up Your Shop in Loyverse Back Office

Taxes

How to Configure Taxes in the Back Office

Video
https://www.youtube.com/watch?v=BIP-BQi6xWU

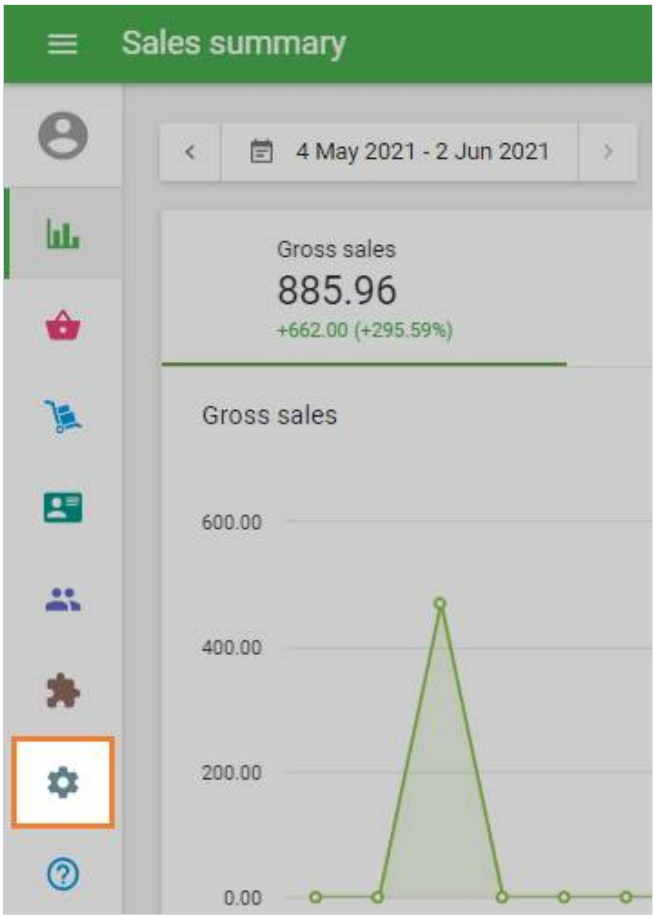
Setting up taxes correctly in Loyverse Back Office ensures that your receipts reflect the appropriate rates for your products and services. Follow these simple steps to create and manage tax settings for your store.

1. Log In

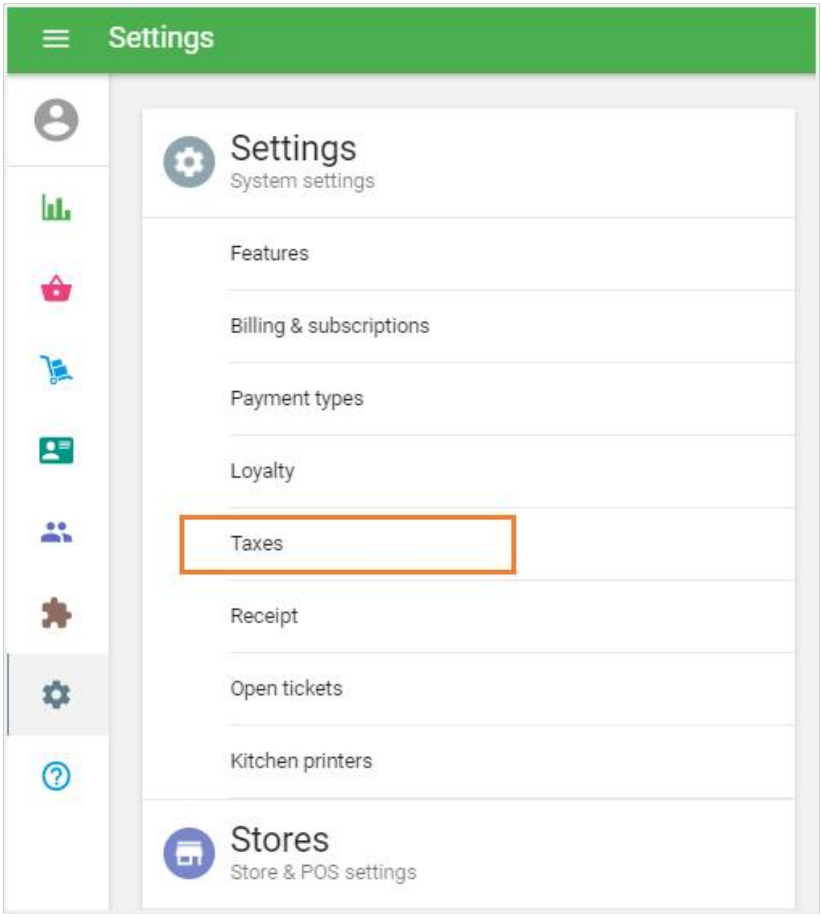
Sign in to your **Loyverse Back Office** account.

2. Navigate to Tax Settings

Click on the '**Settings**' menu.

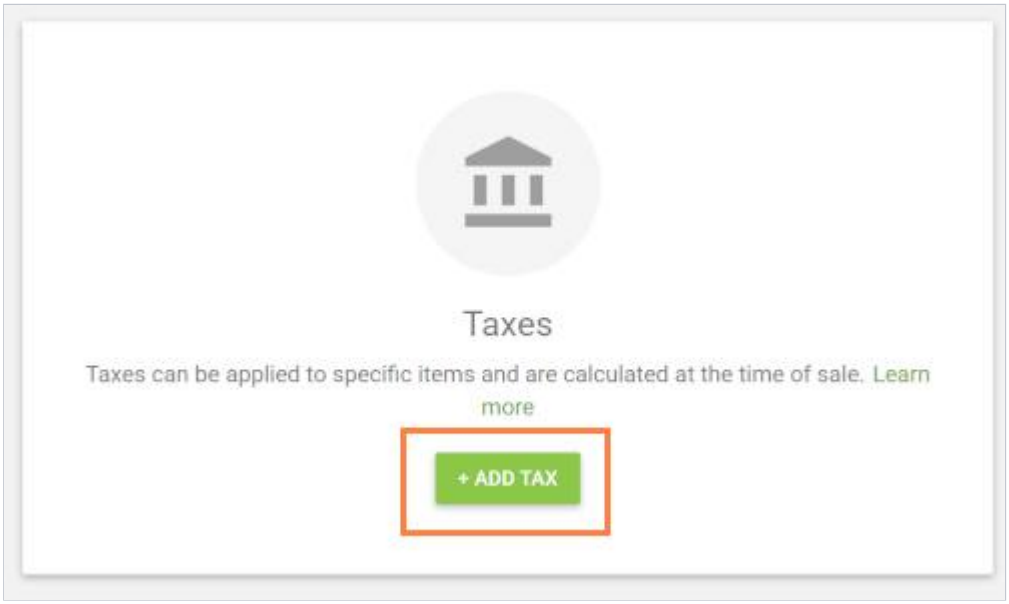


Then, go to the '**Taxes**' section.



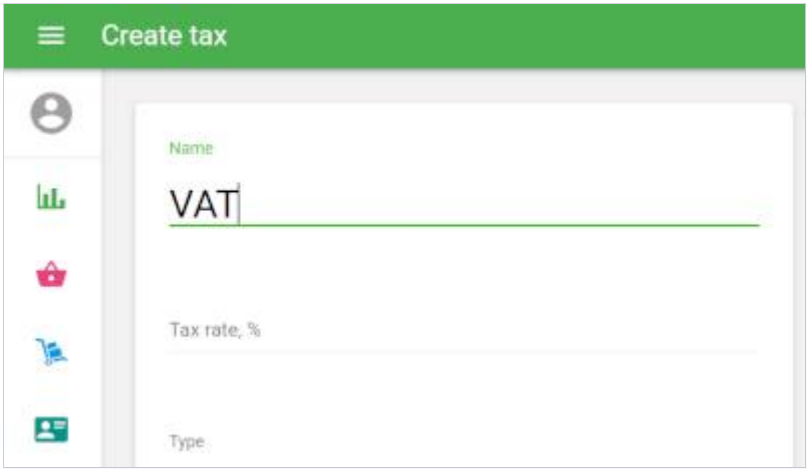
3. Create a New Tax

Click the '**Add Tax**' button.

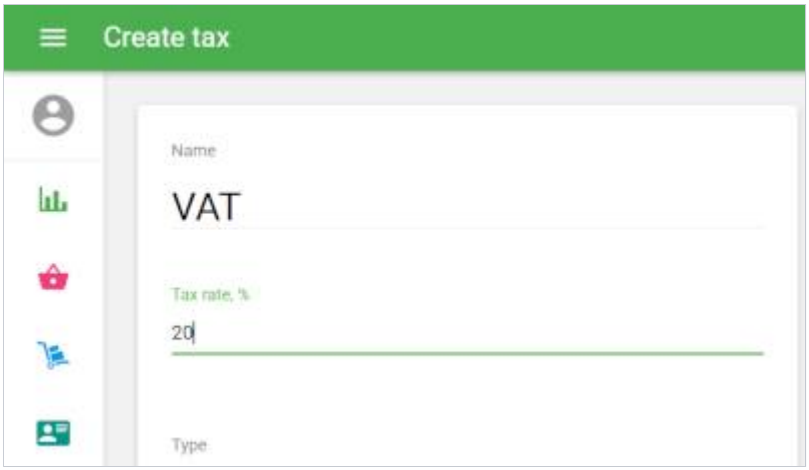


4. Fill in Tax Details

Name your tax (e.g., VAT, Sales Tax, etc.).



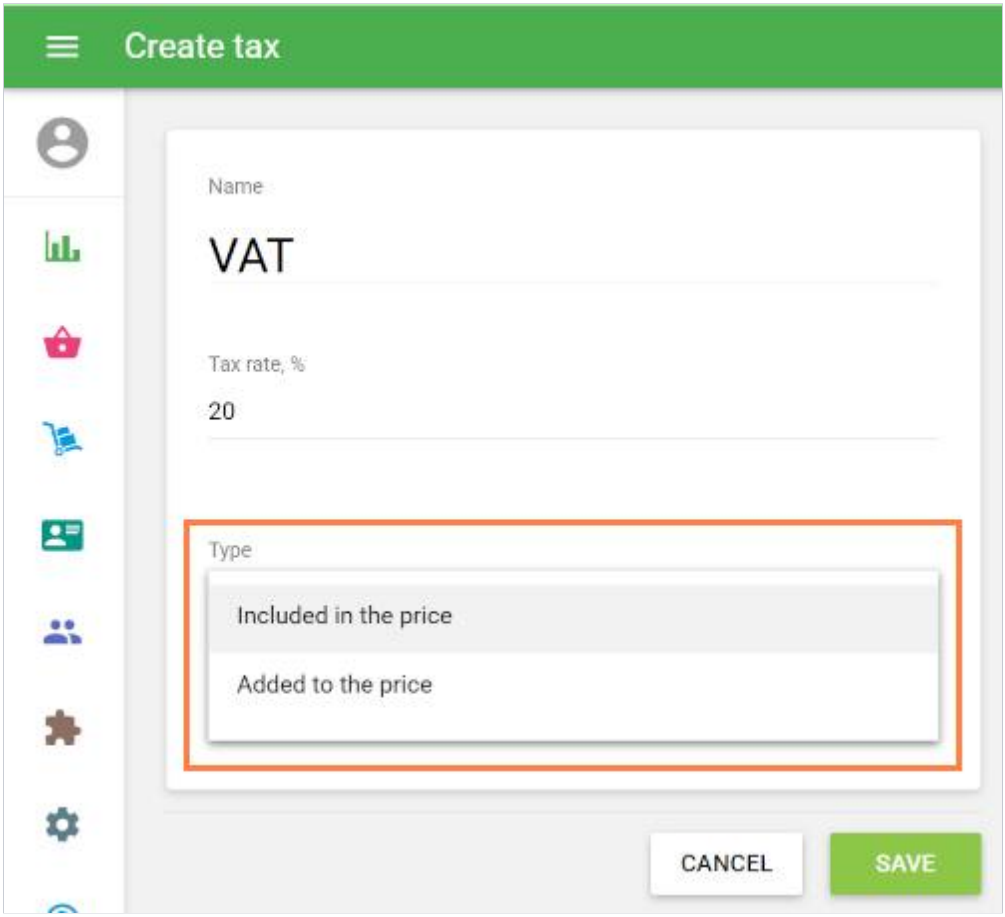
Enter the **Tax Rate** as a percentage (e.g., 20%).



5. Choose Tax Type

Select one of the following options:

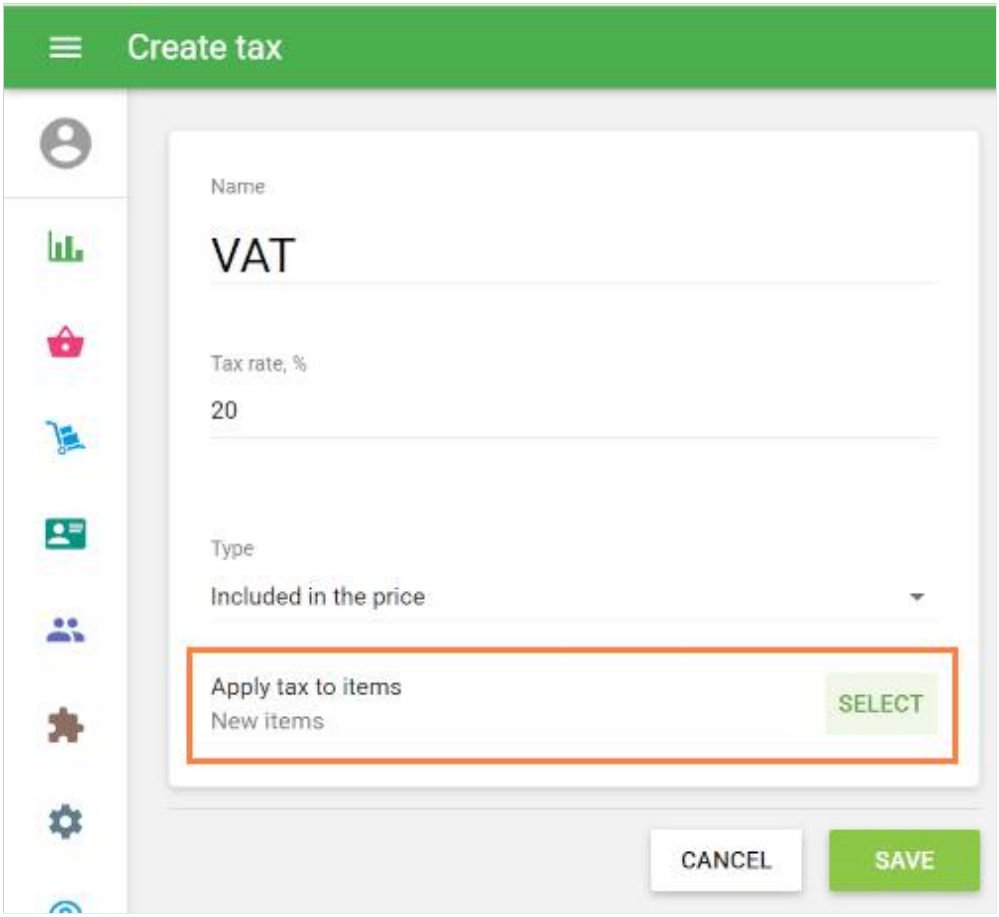
- **Included in the price** – The item price already includes tax.
- **Added to the price** – Tax will be added to the item price at checkout.



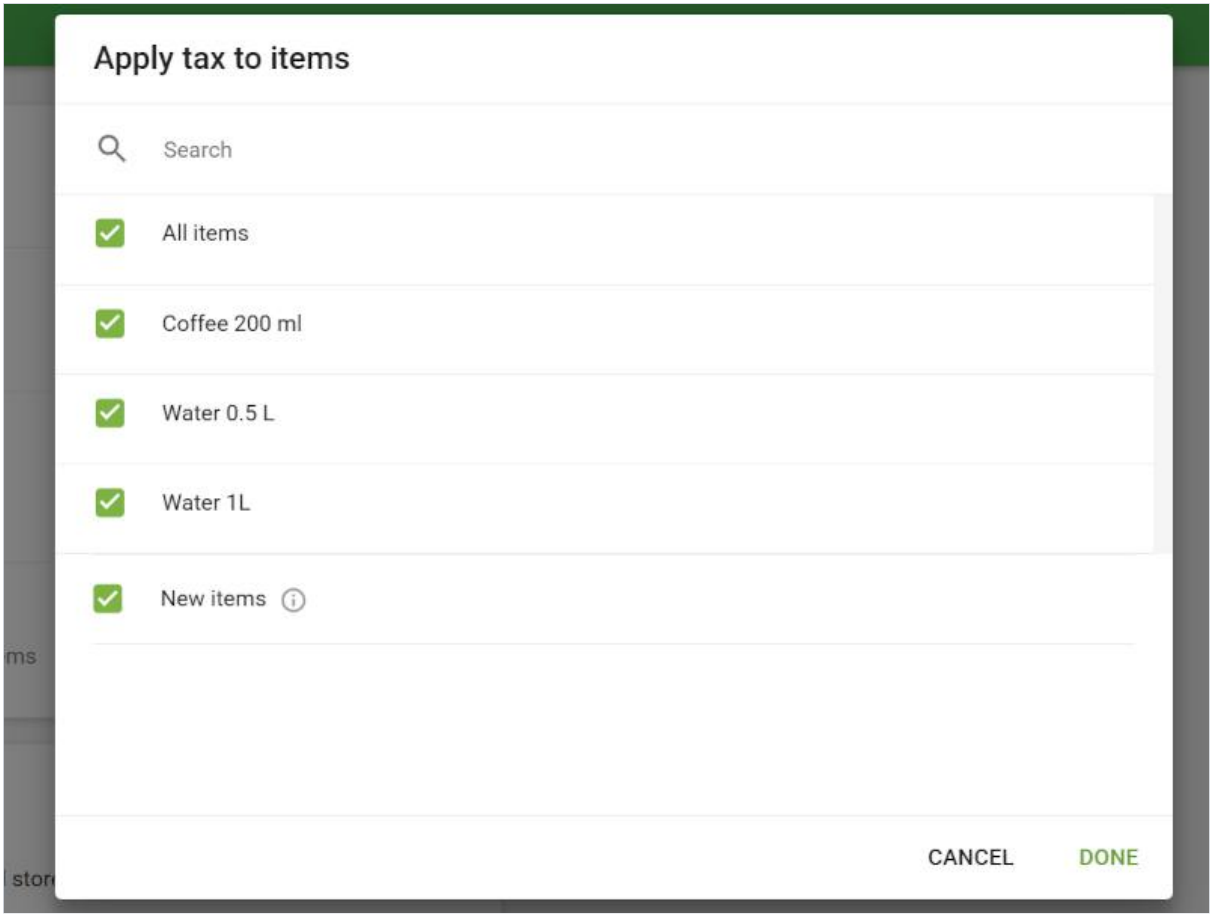
Tip: See the guide **How Taxes are Calculated** for more details on tax types and how they affect pricing.

6. Assign Tax to Items

Click the '**Select**' button at the 'Apply tax to items' line.



In the '**Apply tax to items**' window, select items to which the tax should apply.



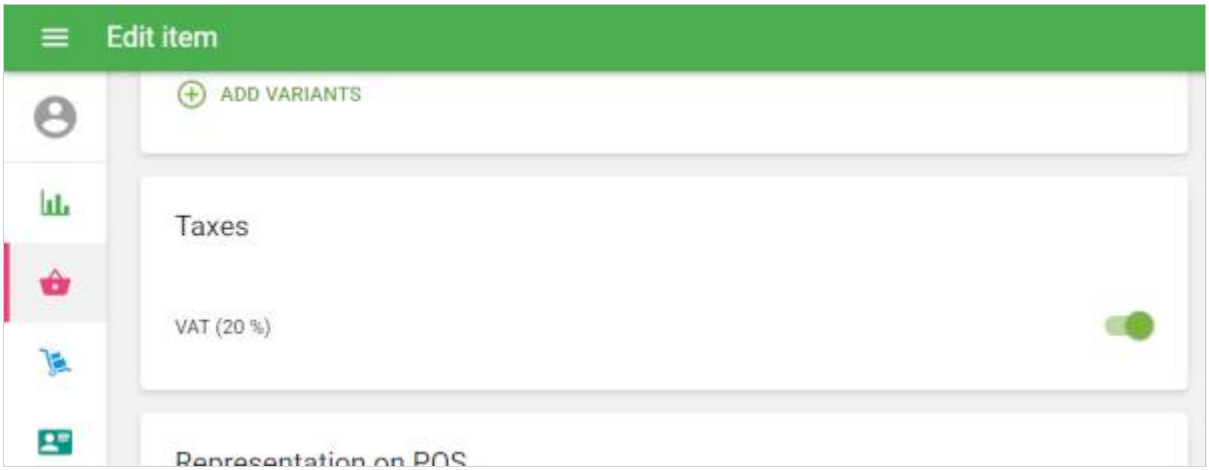
Use the search bar to quickly find items by name.

You can also choose to apply the tax to:

- **All** existing **items** (enable the checkbox at the top of the list)
- **New items** automatically (enable the checkbox at the bottom of the list)

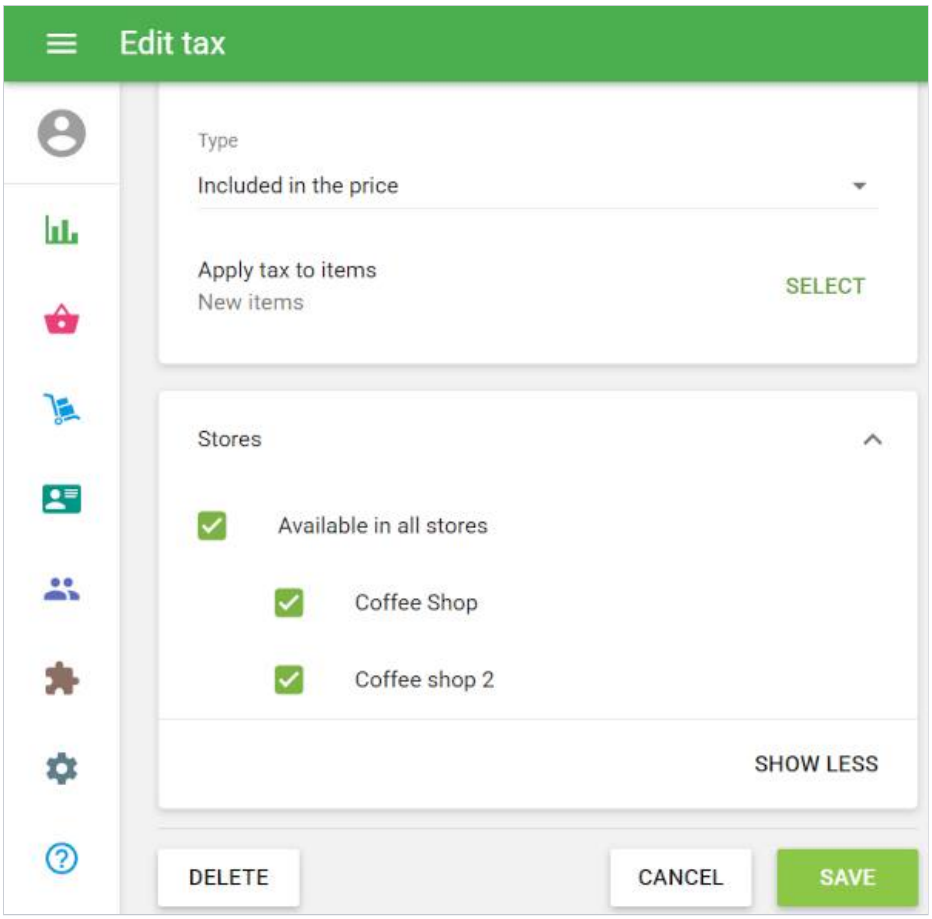
Click '**Done**' to apply and save your tax settings.

Note: You can also **enable or disable a tax for a specific item** by editing the **item card**.



7. Apply Tax by Store (for Multi-Store Accounts)

If you have **multiple stores**, choose the specific store(s) where this tax should apply.



8. Save Changes

Click '**Save**' to apply and save your tax settings.

Your Tax Is Now Active
The configured tax will now be applied automatically at the point of sale to all selected items in the specified stores.

See also:

[How to Set Up Taxes in POS]

[How Taxes are Calculated]

[Setting Up Your Shop in Loyverse Back Office]

[How to Apply Taxes Depending on the Dining Options]

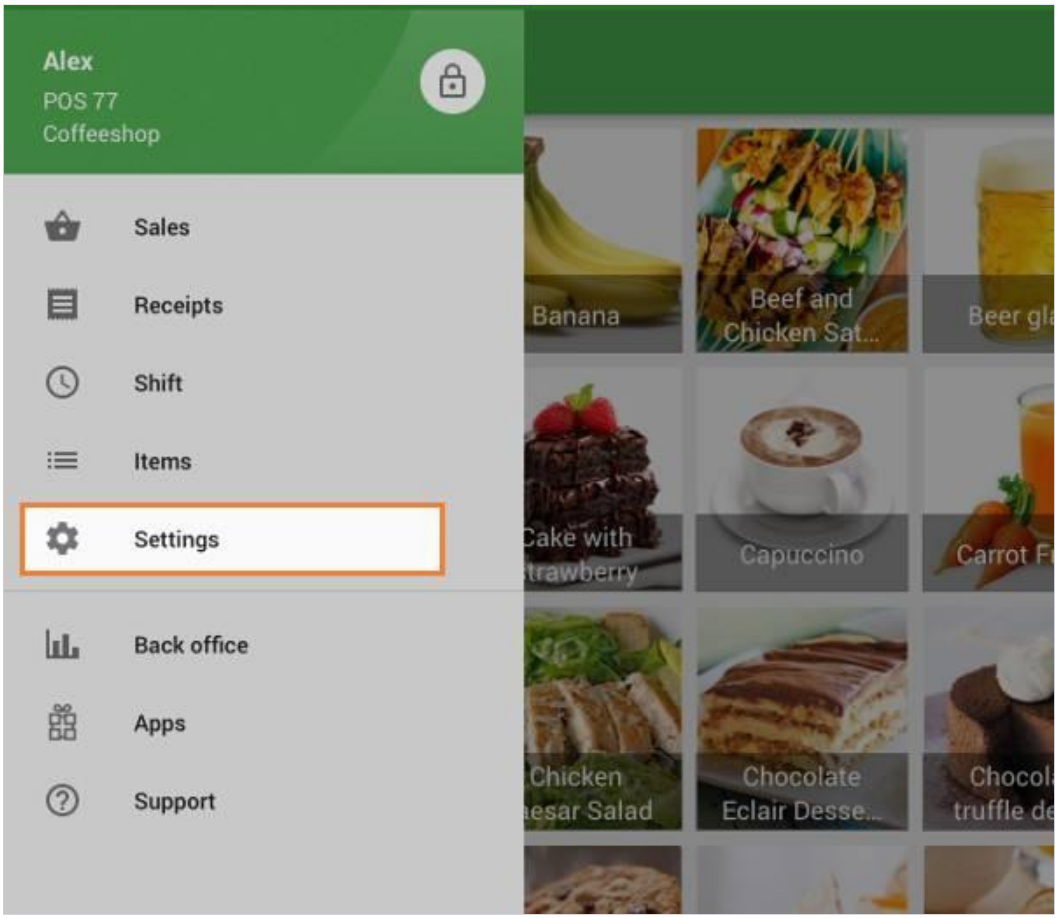
How to Set Up Taxes in POS

You can create and configure taxes directly in the Loyverse POS app. These taxes will automatically be applied during sales according to your settings.

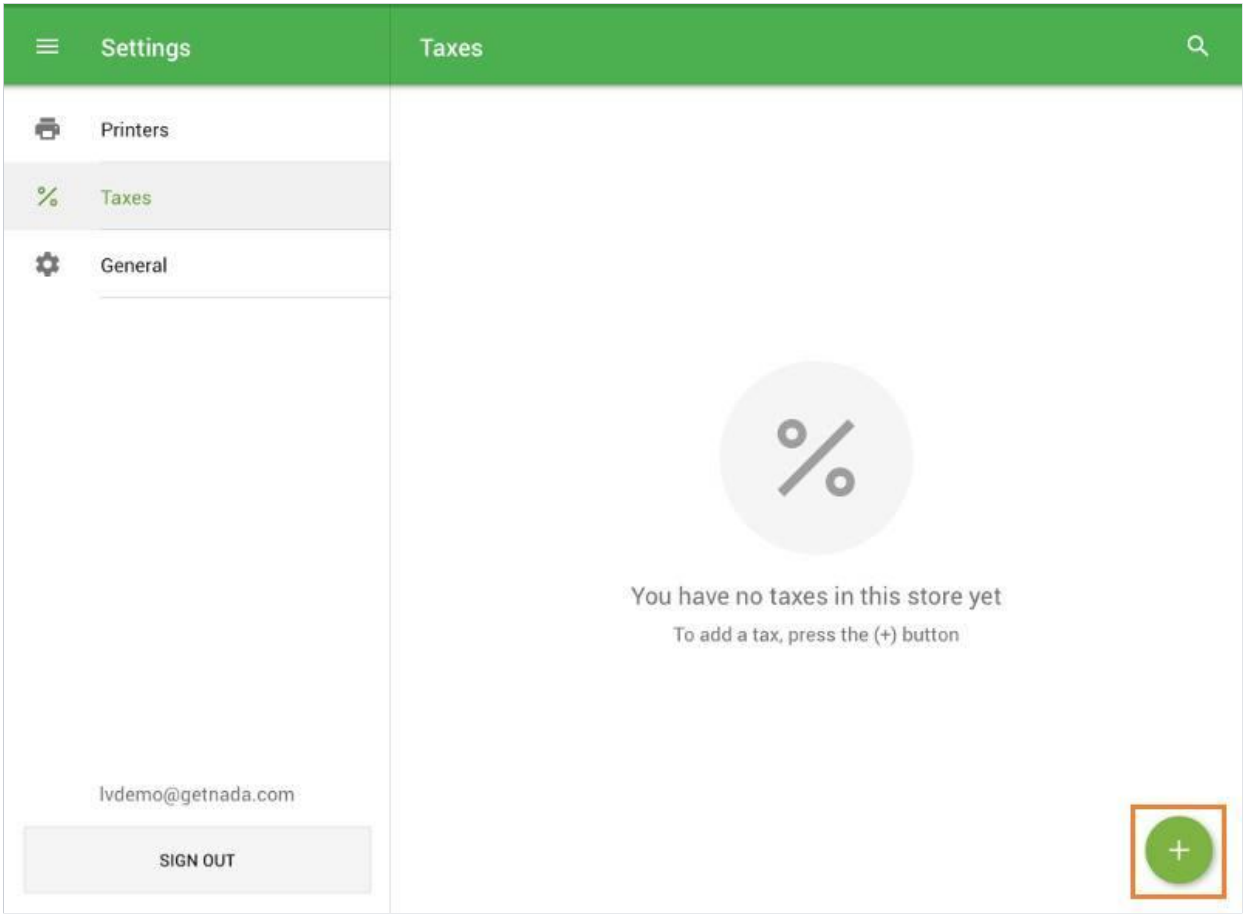
Creating a Tax in POS

Open the **Loyverse POS** app.

From the main menu, go to **Settings → Taxes**.



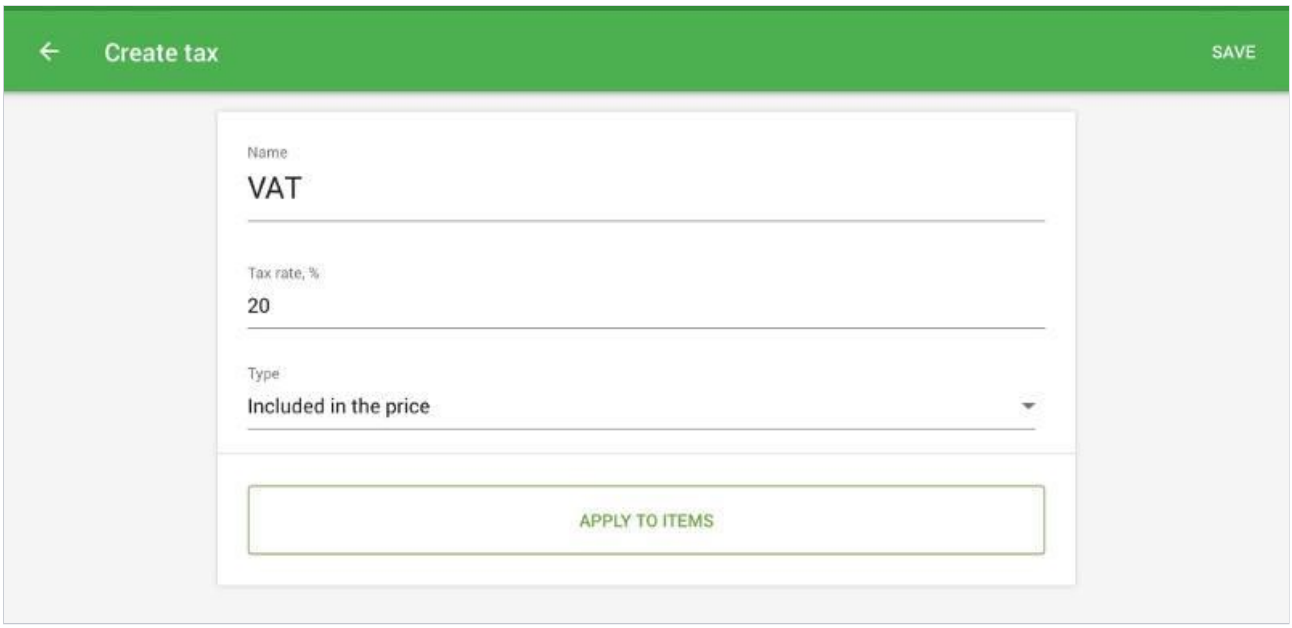
Tap the '**+**' button to create a new tax.



Tax Details

Name – Enter a clear name for the tax (e.g., VAT, Sales Tax).

Tax rate – Input the tax percentage.



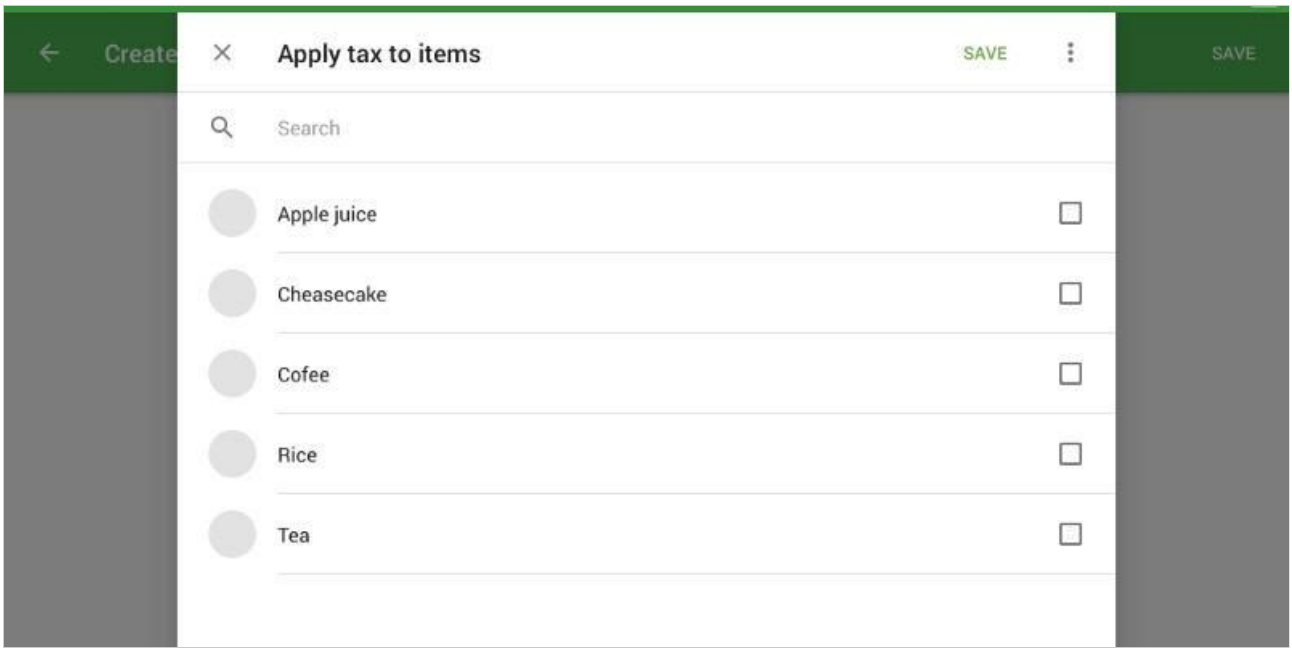
Type – Choose:

- **Included in the price** – The tax is already part of the item price.
- **Added to the price** – The tax is added on top of the item price.

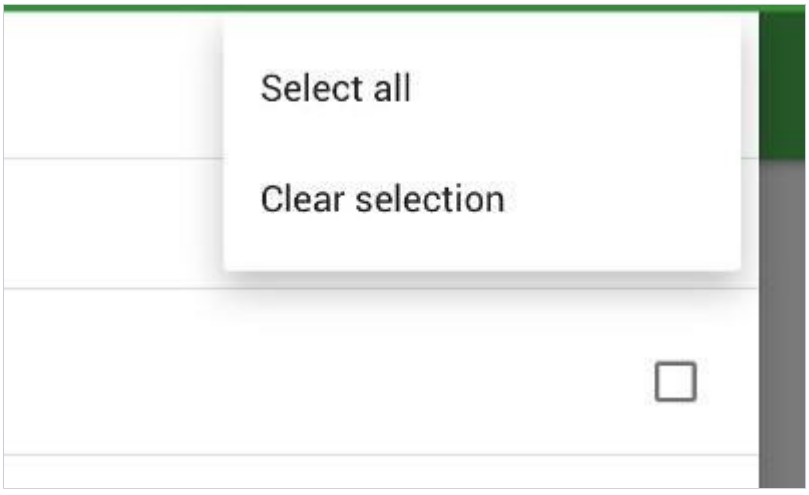
Tap '**Apply to items**' to select which items will be taxed.

Applying Tax to Items

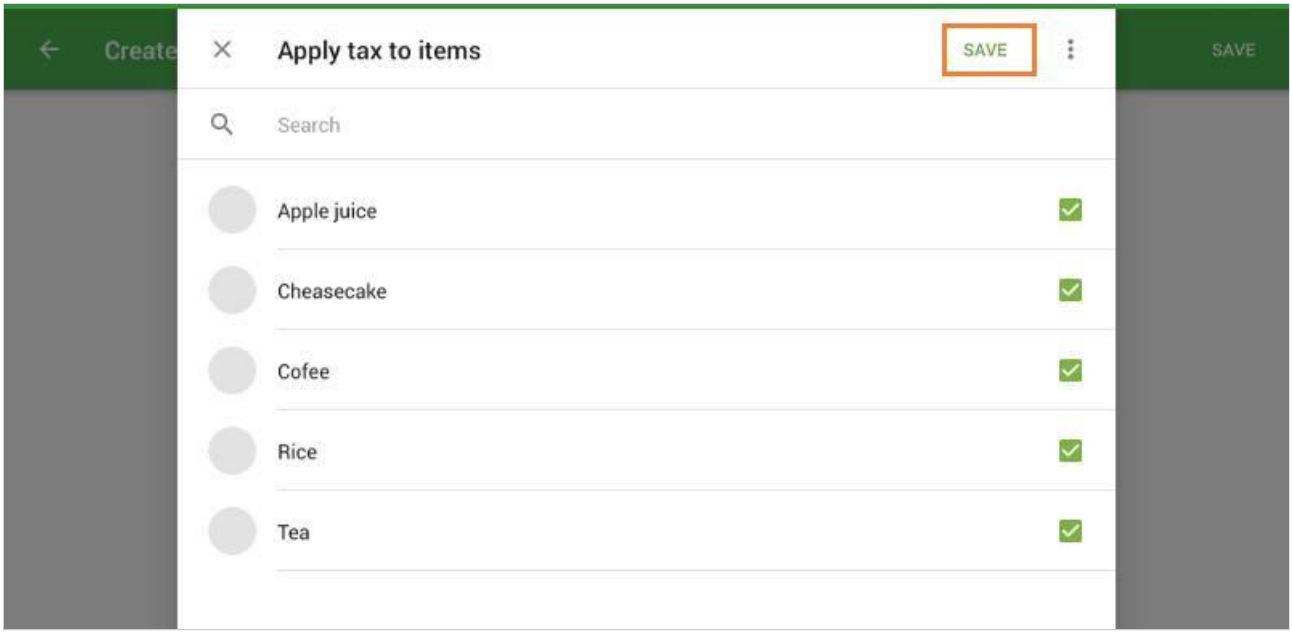
Select specific items from the list, or



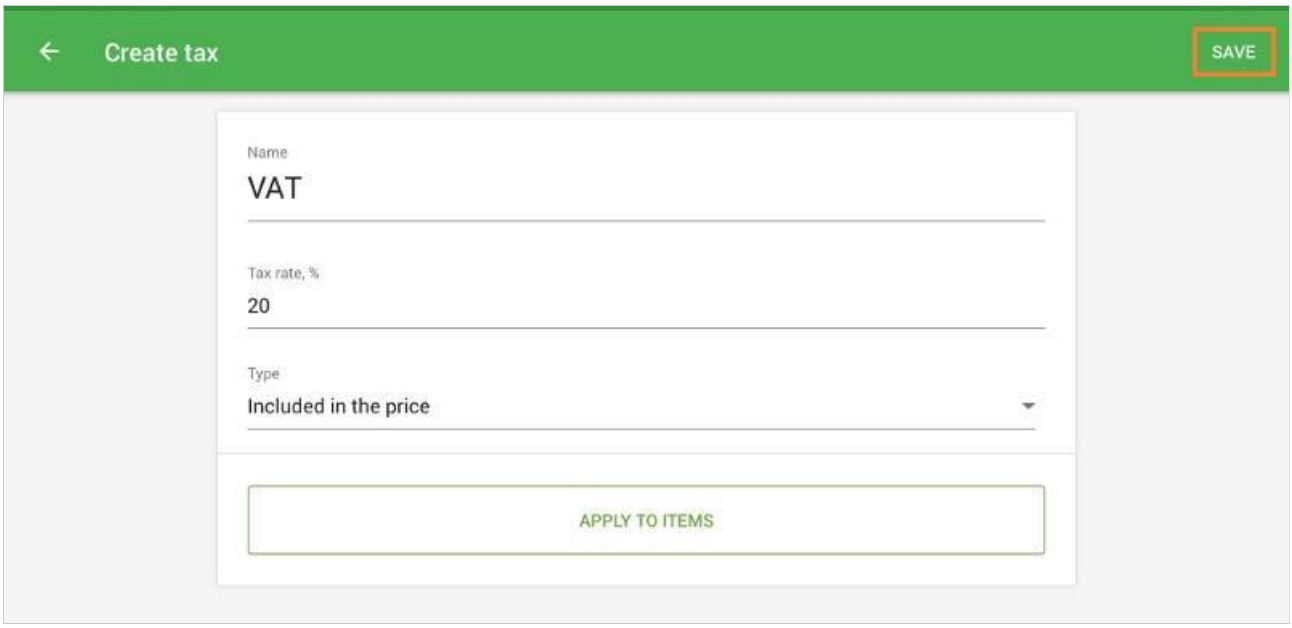
Use the **three dots menu → Select all** to apply the tax to all items.



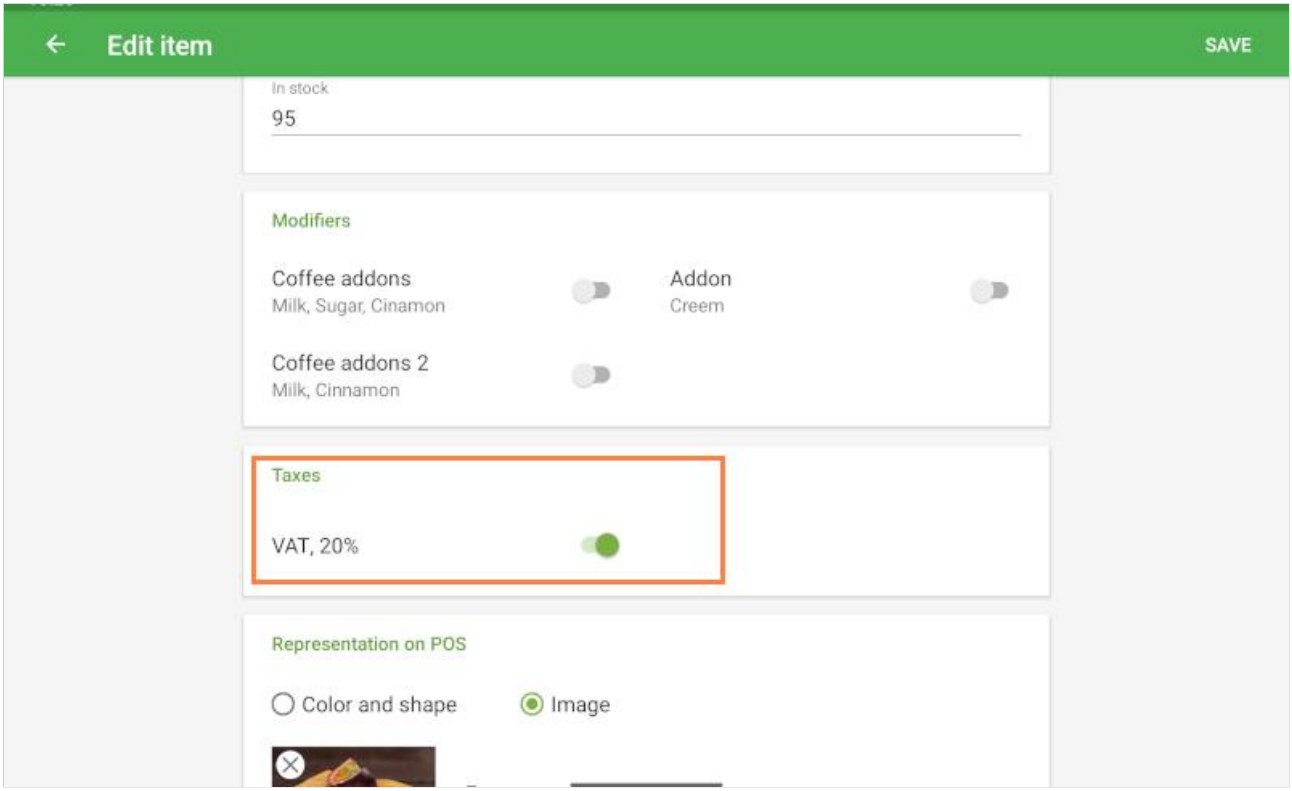
Tap **Save** to confirm your selection.



Tap **Save** again to store your tax settings.



You can also **enable or disable a tax for a specific item** by editing the **item card**.



Notes

- If you have **multiple stores**, a tax created in the POS will only be available for the **store assigned to the current POS device**.
- You can change tax availability for other stores in the **Back Office**.
- Deleting a tax in the POS will also delete it in the Back Office.

See also:

How to Configure Taxes in the Back Office

How Taxes are Calculated

There are two types of taxes that can be applied to items at Loyverse POS (Play Market or App Store): 'added to the price' and 'included in the price'.

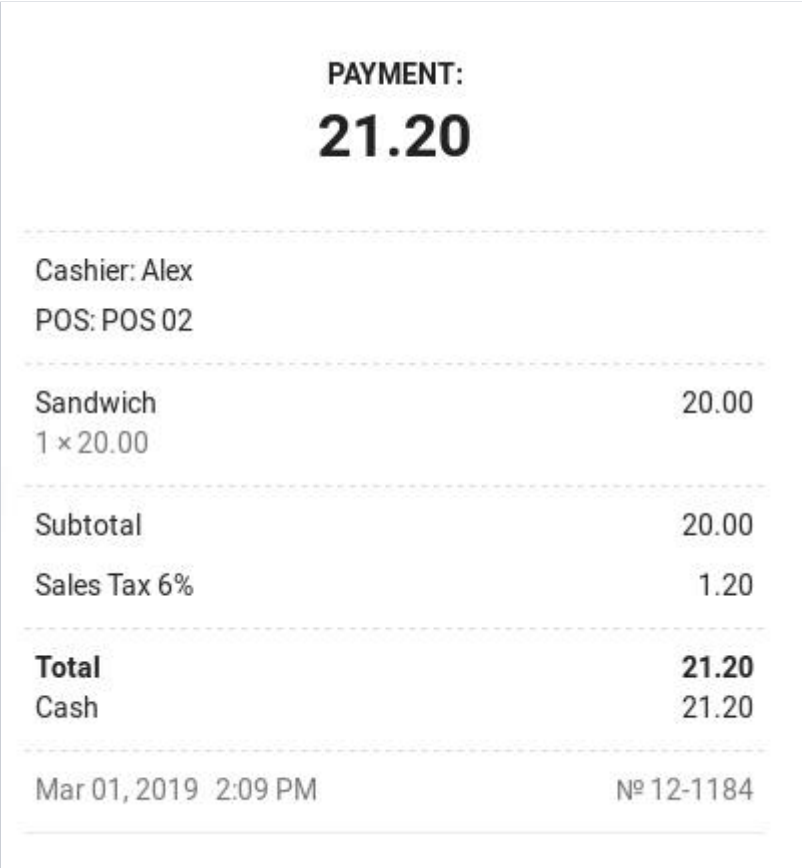
An example of 'added to the price' tax is sales tax in the USA - where all the prices are listed without the sales tax, but during checkout, the sales tax is added to the price, and the customer pays the price of the item plus the sales tax.

An example of 'included in the price' tax is value-added tax (VAT) in EU countries, also known as goods and services tax (GST) in India, Australia, Canada, Malaysia, New Zealand, and Singapore - where the tax is already included in the price listed.

Calculation of ‘added to the price’ tax

To calculate the value of the ‘added to the price’ tax, you have to multiply the item price by the tax rate in decimal form.

For example, if the tax rate is 6%, multiply the item’s price by 0.06. So if the item is 20, the value of the ‘added to the price’ tax will be 20×0.06= 1.20.



Calculation of ‘included in the price’ tax

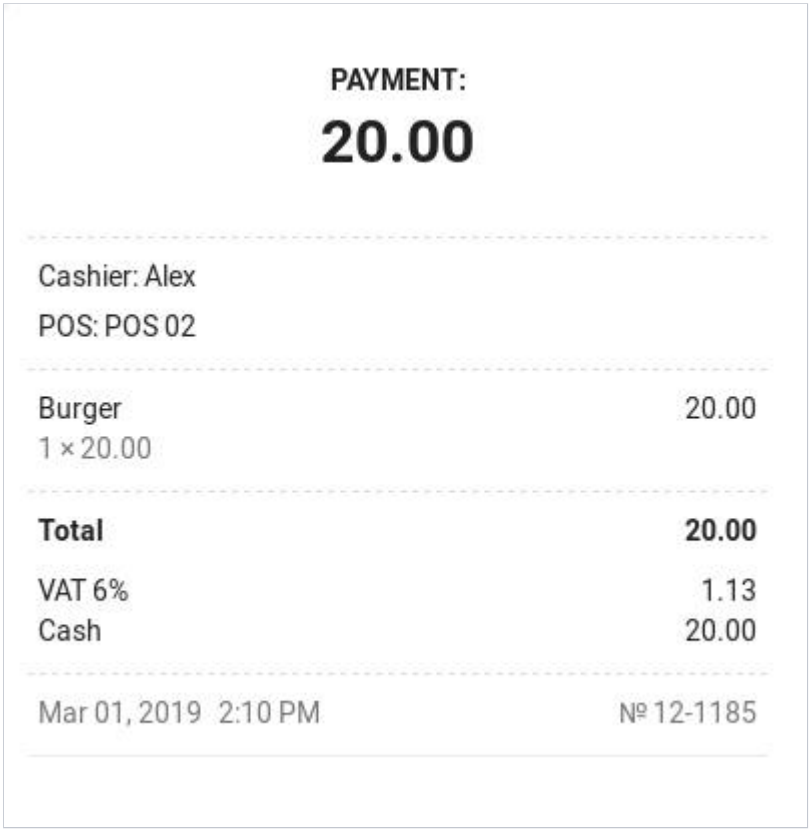
In the case of ‘included in the price’ tax, the item price consists of the pre-tax price value plus the tax value.

Price = PretaxPrice + Tax

And the tax will be applied to the pre-tax price.

To calculate the item's pre-tax price, divide the price by 1 + the tax rate in decimal form. To find the value of the tax that is included in the item’s price, you have to subtract the pre-tax price from the item price.

For example, if the tax rate is 6%, divide the item’s price by 1.06. So if the item is 20 with the ‘included in the price’ tax, then the value of the pre-tax price is 20/1.06 = 18.87 (rounded), and the value of the ‘included in the price’ tax is 20-18.87=1.13.



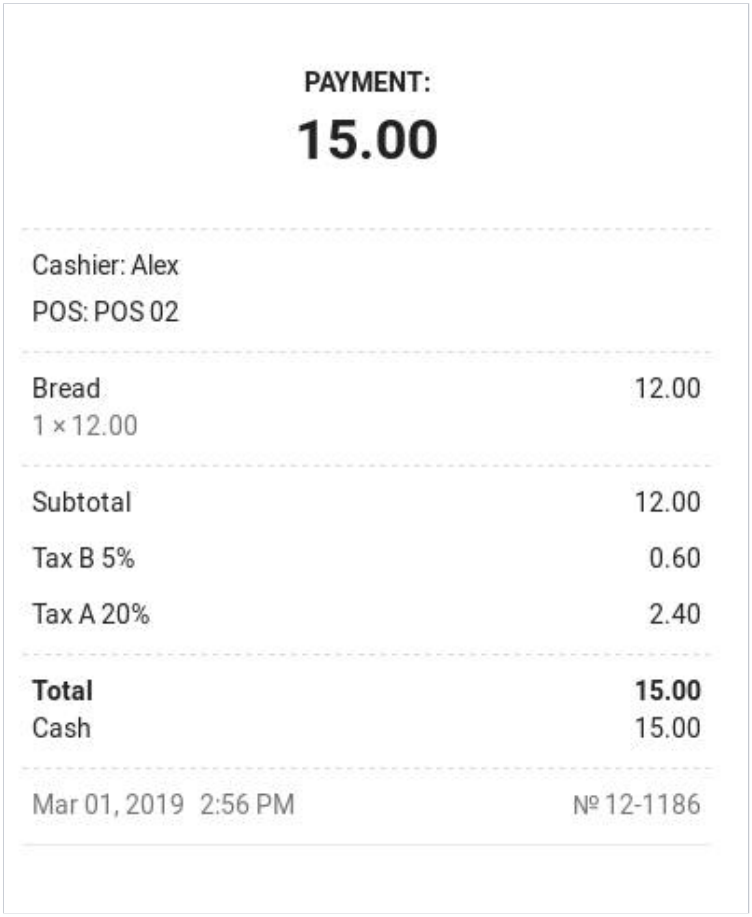
Application of several taxes at the same time

How to calculate the tax value if multiple 'added to the price' taxes were applied to an item

The value of multiple 'added to the price' taxes of an item is calculated in the same way as if only one tax is applied (see above).

For example, if you sell an item at 12.00 with added tax A=20% and added tax B=5%, the tax values will be 2.40 and 0.60 respectively:

TA = 12×0.20=2.4; TB = 12×0.05=0.6



How to calculate the tax value if multiple 'included in the price' taxes were applied to an item

The value of 'included in the price' tax of an item is calculated as the multiplication of the price of the item and the tax rate, divided by the sum of the rates of all included taxes plus one:

$$TI = \frac{p \times TIPV}{(1 + \sum_i TIPV_i)}$$

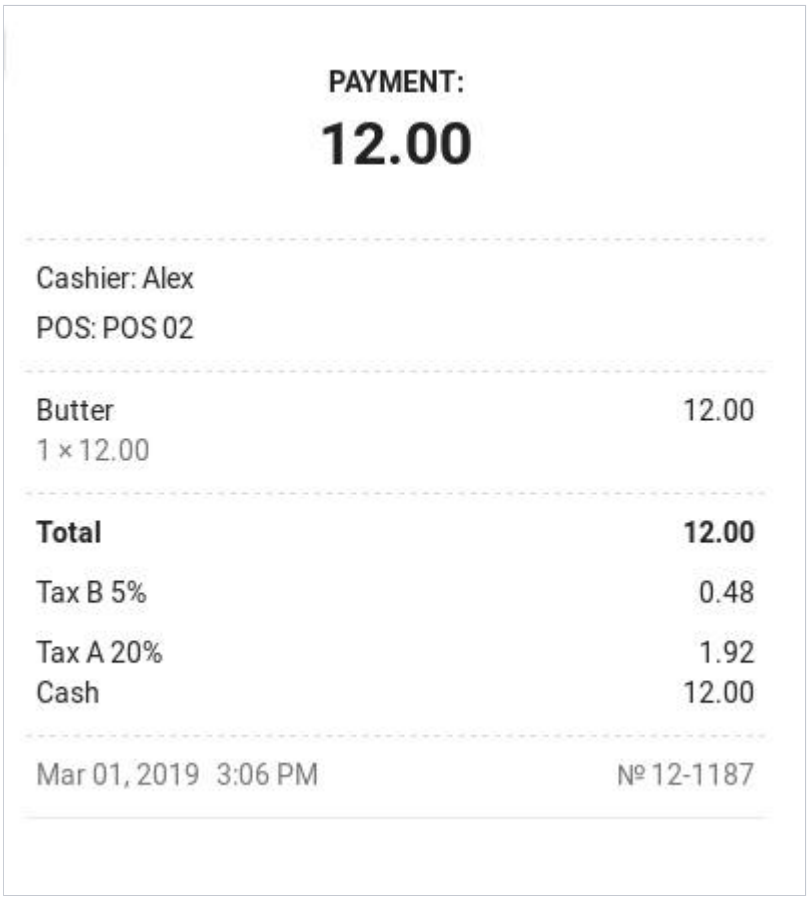
where

TI = the value of the 'included in the price' tax
p = the price of the item
TIPV = the included tax rate in decimal form
i = the number of tax rates included in the price

For example, if you sell an item at 12.00 with included tax A=20% and included tax B=5%, the value of TI will be 1.92 and 0.48 respectively:

$$TI_A = \frac{12 \times 0.2}{(1 + 0.2 + 0.05)} = 1.92$$

$$TI_B = \frac{12 \times 0.05}{(1 + 0.2 + 0.05)} = 0.48$$



PAYMENT:

12.00

Cashier: Alex

POS: POS 02

Butter 1 × 12.00	12.00
Total	**12.00**
Tax B 5%	0.48
Tax A 20%	1.92
Cash	12.00
Mar 01, 2019 3:06 PM	№ 12-1187

How to calculate the value of the 'added to the price' tax if the price has included taxes

The value of the 'added to the price' tax of an item is calculated as the multiplication of the rate of the added tax by the price of the goods reduced by the sum amount of the included taxes:

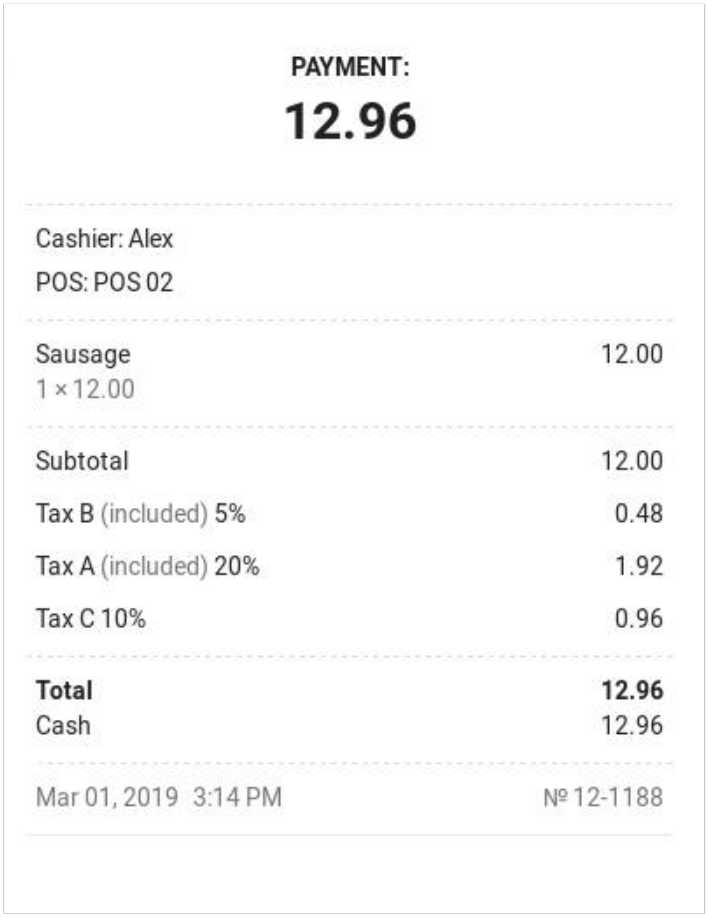
$$TA = TAPV \times (p - \sum_i TI_i)$$

where

TA = the value of the 'added to the price' tax
p = the price of the item
TAPV = the added tax rate in decimal form (1%=0.01)
TI = the value of the 'included in the price' tax
i = the number of tax rates included in the price

For example, if you sell an item at 12.00 with included tax A=20% and included tax B=5%, and also added tax C=10%, the value of TA will be 0.96:

$$TA = 0.1 \times (12 - (1.92 + 0.48)) = 0.96$$



PAYMENT:

12.96

Cashier: Alex
POS: POS 02

Sausage 1 × 12.00	12.00
Subtotal	12.00
Tax B (included) 5%	0.48
Tax A (included) 20%	1.92
Tax C 10%	0.96
Total Cash	**12.96** 12.96
Mar 01, 2019 3:14 PM	№ 12-1188

See also:

How to Configure Taxes in the Back Office

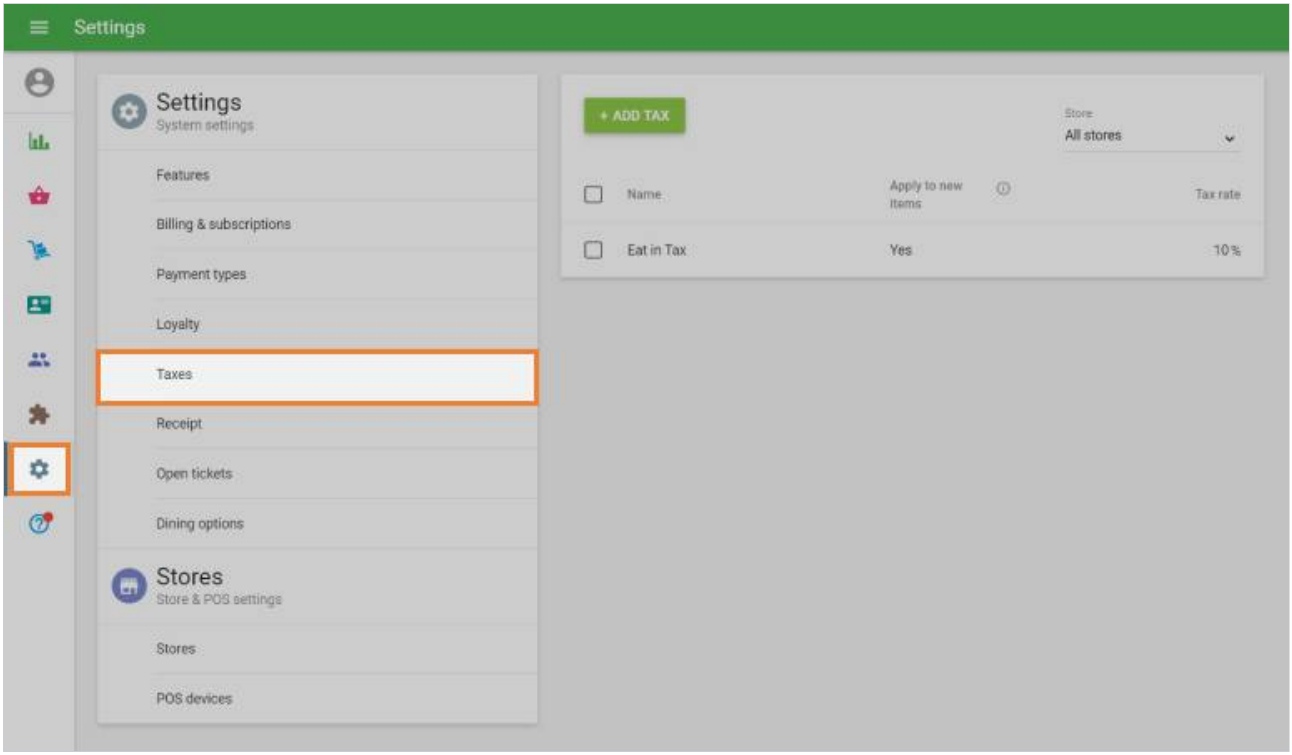
How to Apply Taxes Depending on the Dining Options

Video
https://www.youtube.com/watch?v=BIP-BQi6xWU

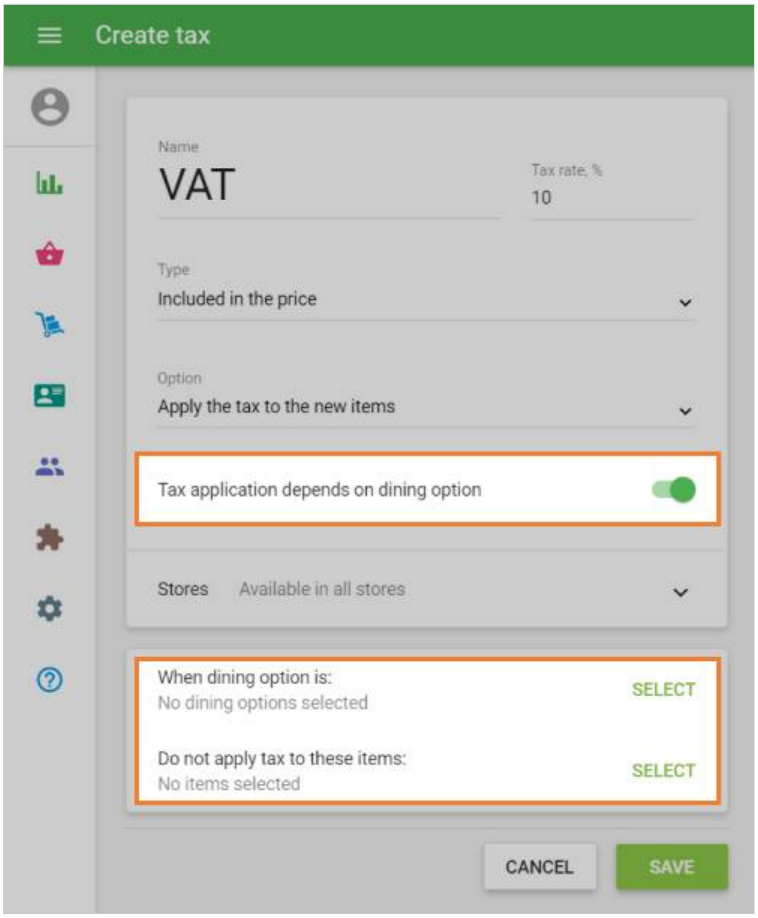
In some countries, the tax on certain goods depends on the dining options. For example, if the customer orders food for takeout, it is not taxed. But in the case of consuming the same food inside the cafe, it is taxed.

Please be sure that the Dining Options is activated in the Back Office.

Go to the 'Taxes' section in the 'Settings' in the Back Office. Open the existing tax to edit or create a new one.

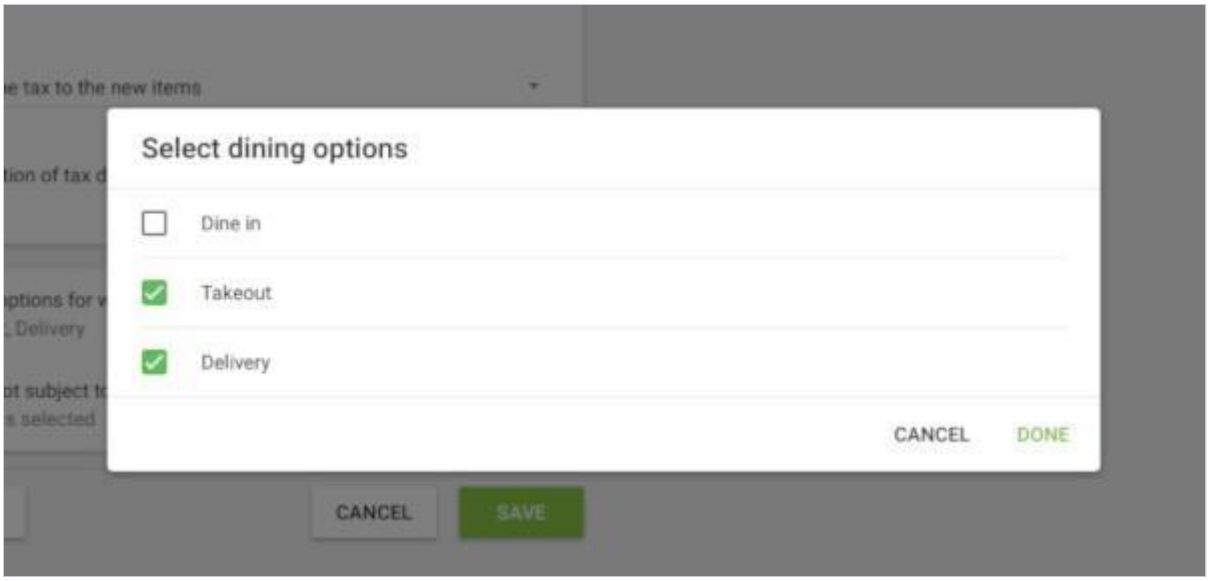


Switch on the ‘Tax application depends on dining option’.



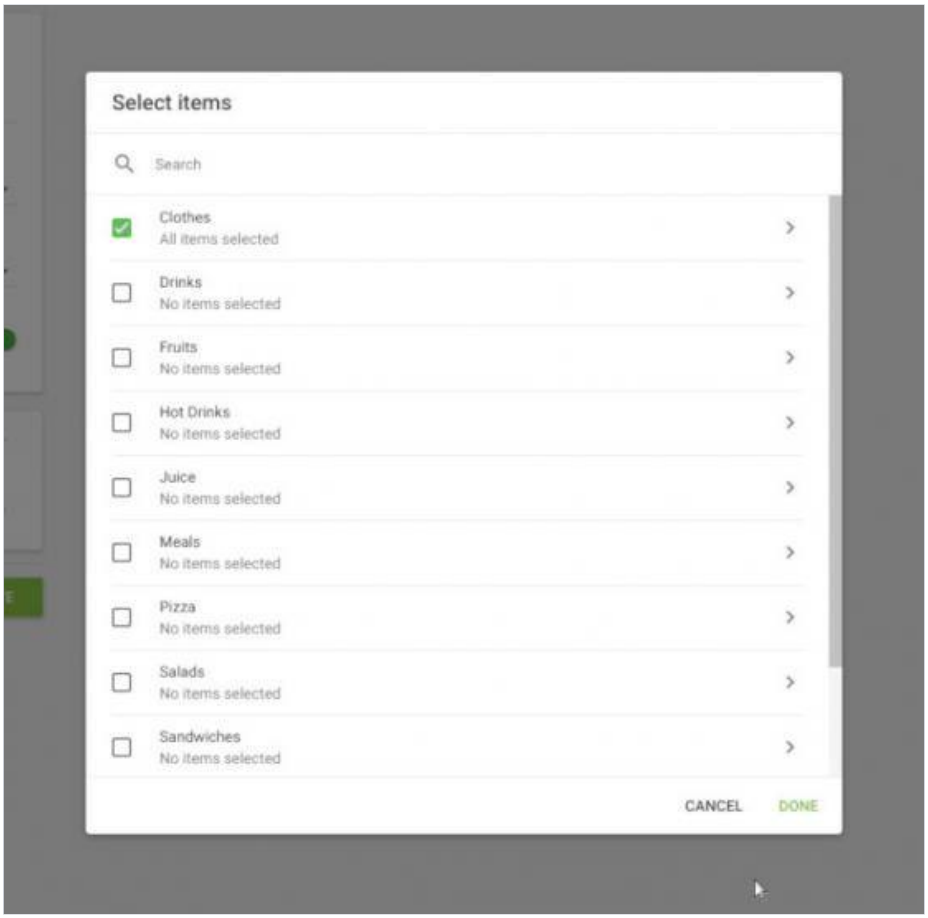
Click on the ‘Select’ button to choose the **dining option for which an exemption of the tax applies**.

For example, if you want your tax to apply only for ‘Dine in’, select all other options: ‘Takeout’ and ‘Delivery’.



Don't forget to save your settings by clicking ‘Done’.

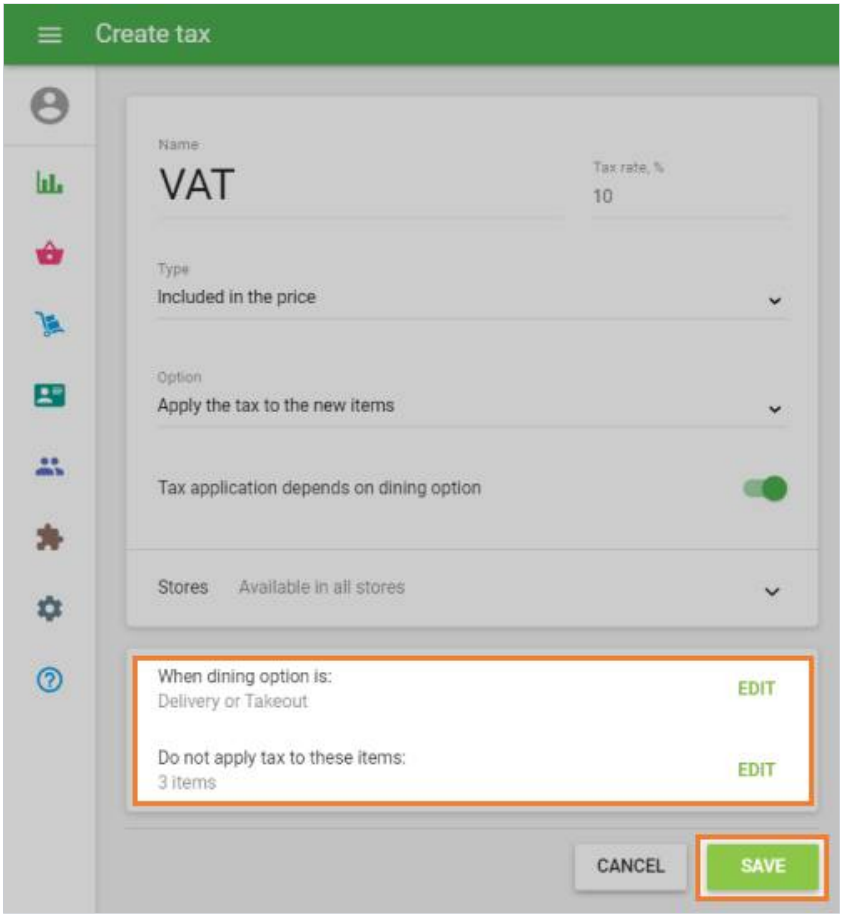
Click on the ‘Select’ button to choose **items not subject to tax**.



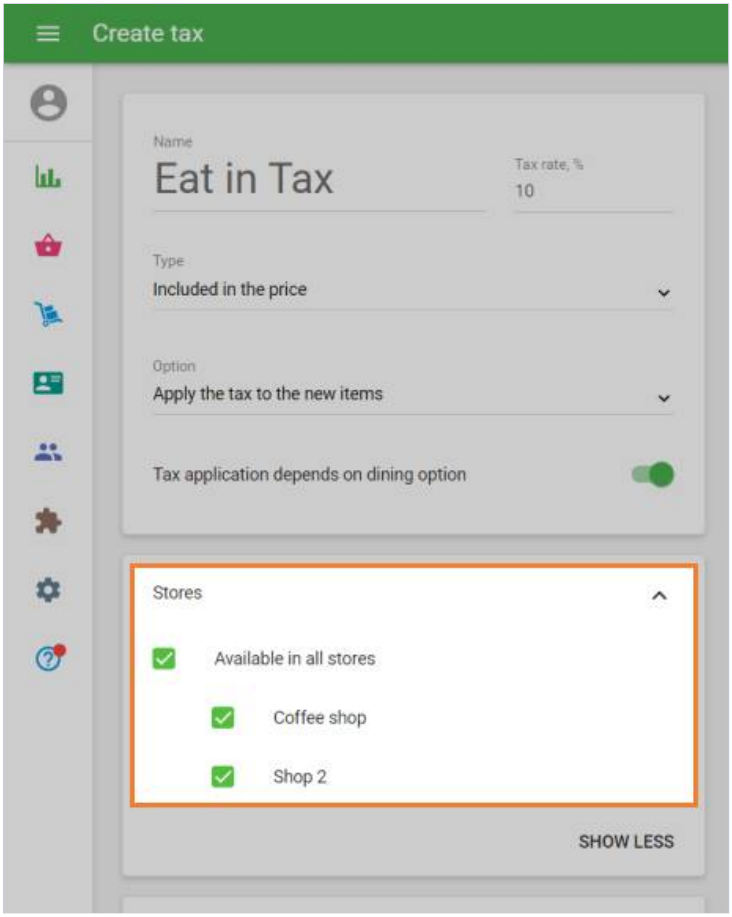
You can select the whole category or certain items that are excluded from tax.

Don't forget to save your settings by clicking ‘Done’.

After you have set the exceptions for the application of your tax, you will see their short description. You can edit them or save changes.



If you have several stores, you can select the availability of the tax for each store.



You will also see the information about the applied dining option in the item edit card.

During a sale, the system removes the tax from items in the ticket to which it should not be applied according to the settings and exceptions made for the dining option so that the cashier does not need to remove it manually.

Note: the cashier can also change the application of the tax to the item manually during the sale, but this change would be applied only to the items in the current ticket.

See also:

Dining Options

How to Configure Taxes in the Back Office

API & Marketplace

How to Connect Apps from the Marketplace to Loyverse

Video
https://www.youtube.com/watch?v=U_zLnWpcCRU

Loyverse POS allows you to connect third-party applications to streamline and automate your business operations, such as accounting, e-commerce, marketing, and data synchronization.

There are **two ways** to connect apps to your Loyverse account:

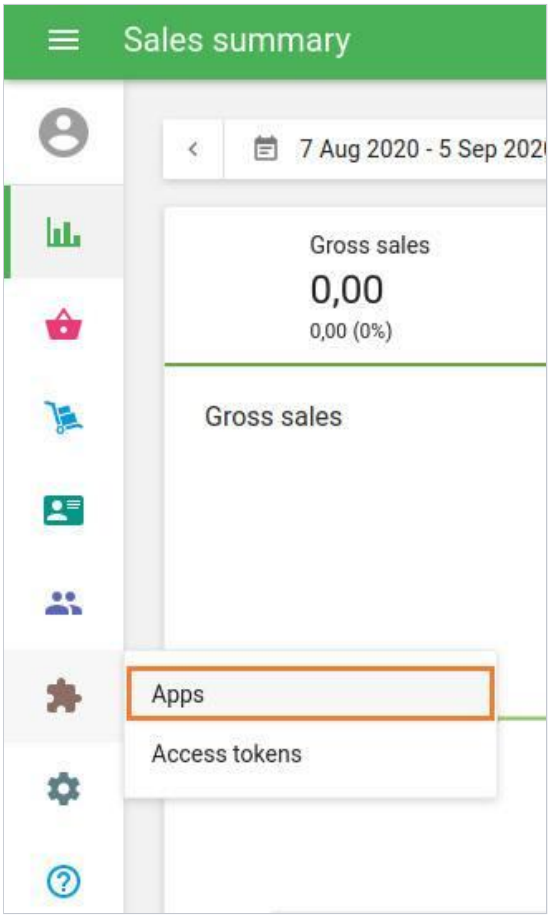
- **Connect an app from the Marketplace** and approve access.
- **Generate API access tokens** for custom integrations (for developers).

1. Connecting Apps via the Loyverse Marketplace

Step 1: Go to the Apps Section

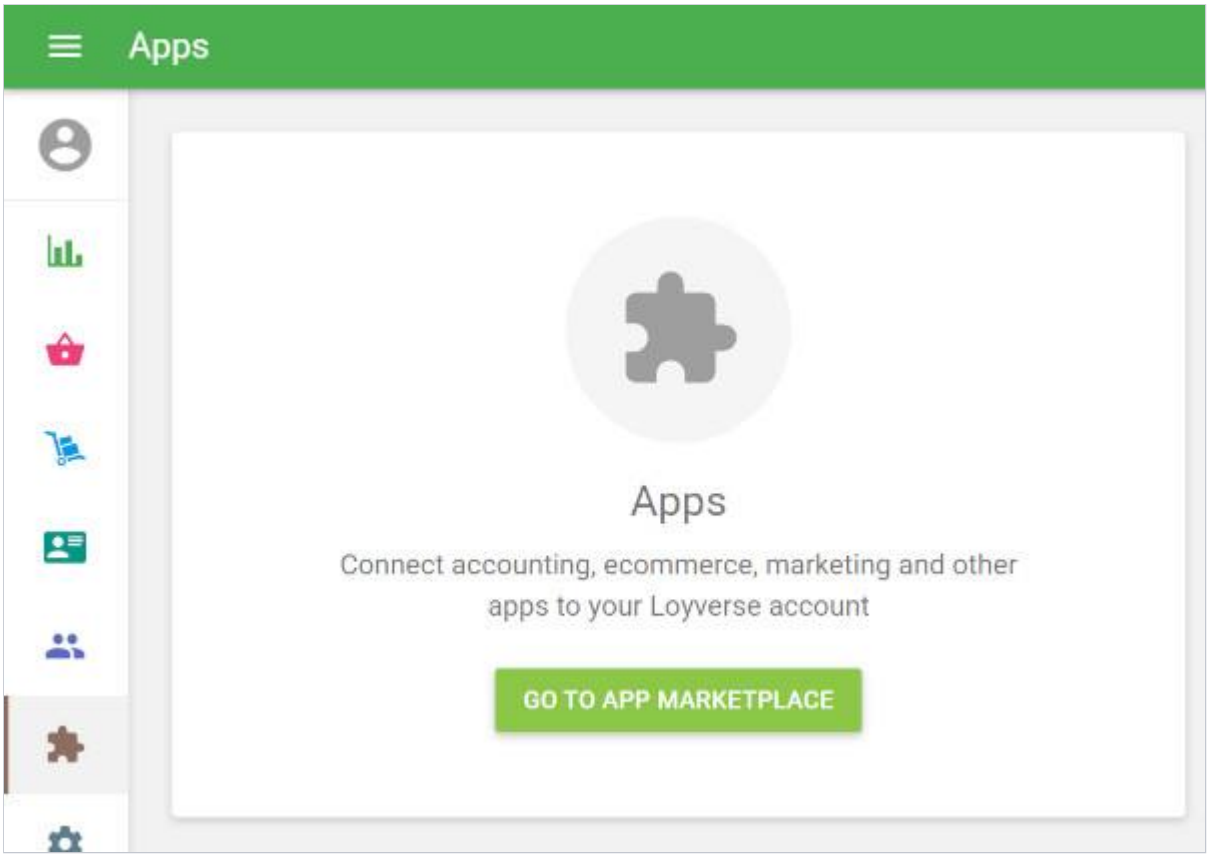
Log in to your Loyverse **Back Office**.

From the left-side menu, select '**Apps**'.



Step 2: Open the Marketplace

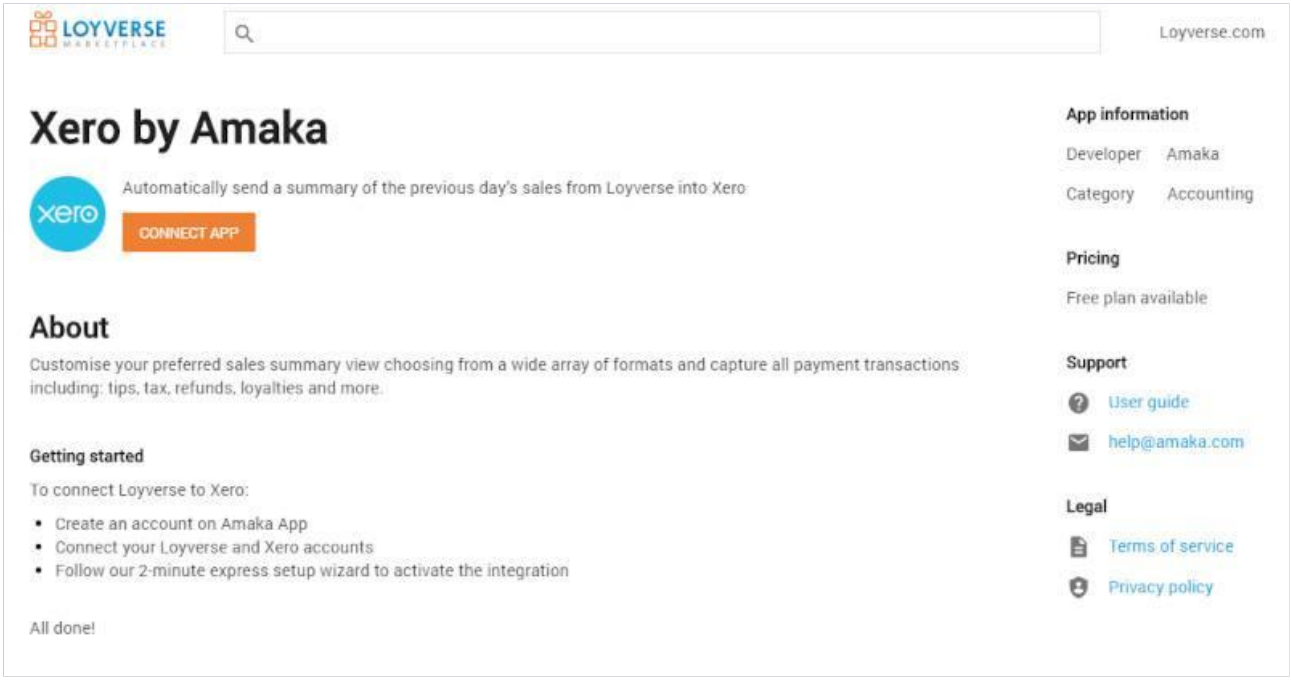
- Click the '**Go to App Marketplace**' button.



- Browse or search for the app you want to integrate with Loyverse.

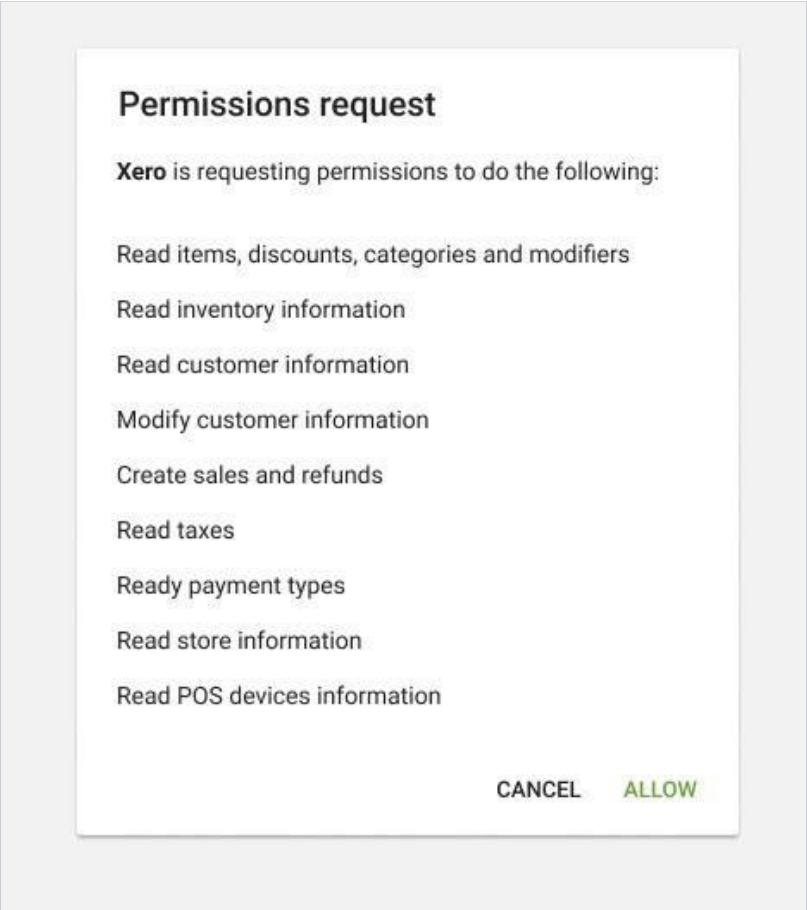
Step 3: Start the Connection

- Find your desired app and click '**Connect app**'.



Step 4: Approve Permissions

- You'll be redirected to the app developer's website to begin the integration process.
- During this process, you will be asked to **grant access** to your Loyverse account.
- The **permission request** will list the specific data and actions the app needs.



- To proceed, click '**Allow**'.

Step 5: Complete the Setup

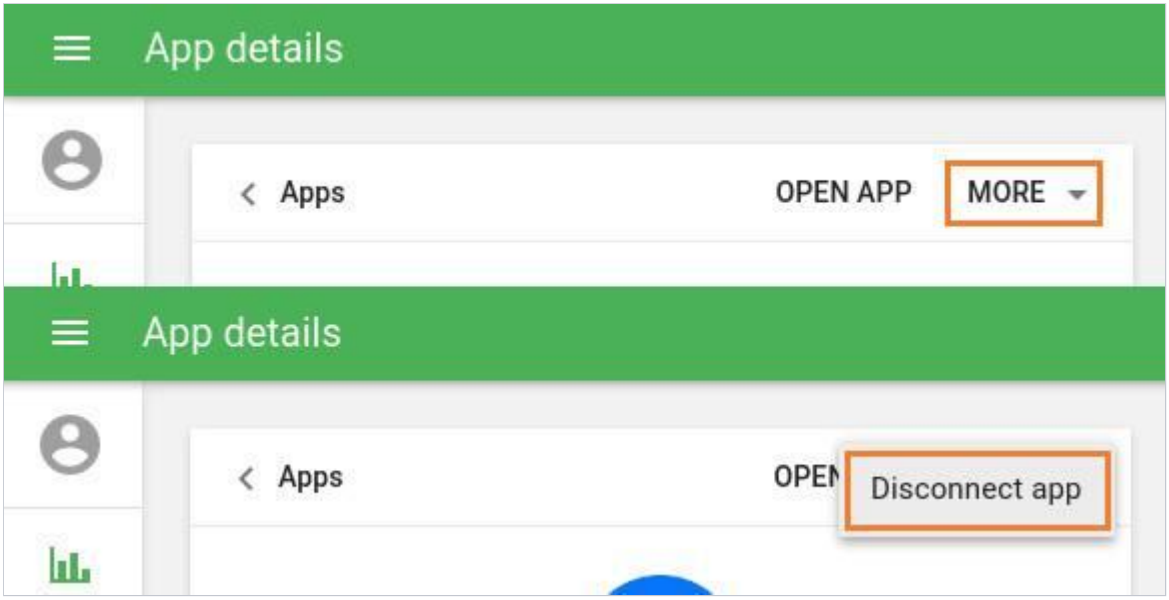
- After granting access, you'll be redirected back to the app's platform.
- Follow the instructions provided by the app to complete the integration (you may need to create an account with the third-party service).

Once connected, the app will appear in the '**Apps**' section of your Back Office.

2. Disconnecting an App

To disable any connected app:

- Go to the '**Apps**' section in your Back Office.
- Click on the app and select the option **Disconnect app**.



Popular App Categories Available in the Marketplace

Accounting:

- QuickBooks
- Xero

eCommerce and marketplaces:

- Shopify
- WooCommerce
- Magento
- BigCommerce
- Amazon
- eBay
- Lazada
- Wix
- OpenCart
- nopCommerce
- Google Shopping
- Fancy
- ChannelAdvisor

- Souq
- Wordpress
- and many others

Online ordering:

- UberEats
- Doordash
- Grubhub
- Zomato
- Glovo
- Rappi
- and many other regional players

Marketing:

- Mailchimp
- Constant Contact

Connectors:

- Google Data Studio
- Power BI
- Mailchimp
- Telegram
- Wave
- TradeGecko
- Google Drive
- Google Sheet

Check the Loyverse App Marketplace for a full list of supported apps and platforms.

See also:

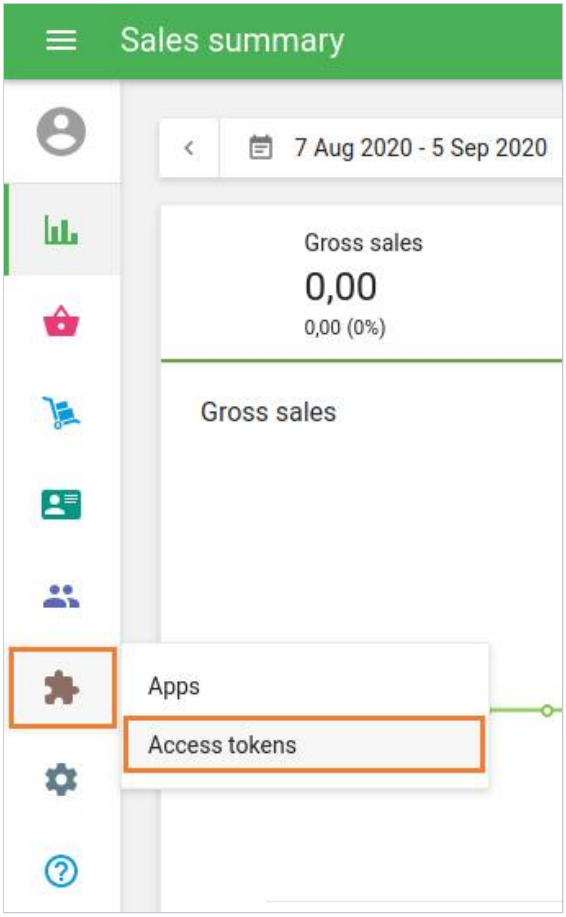
How to create tokens for API

How to Create Tokens for API

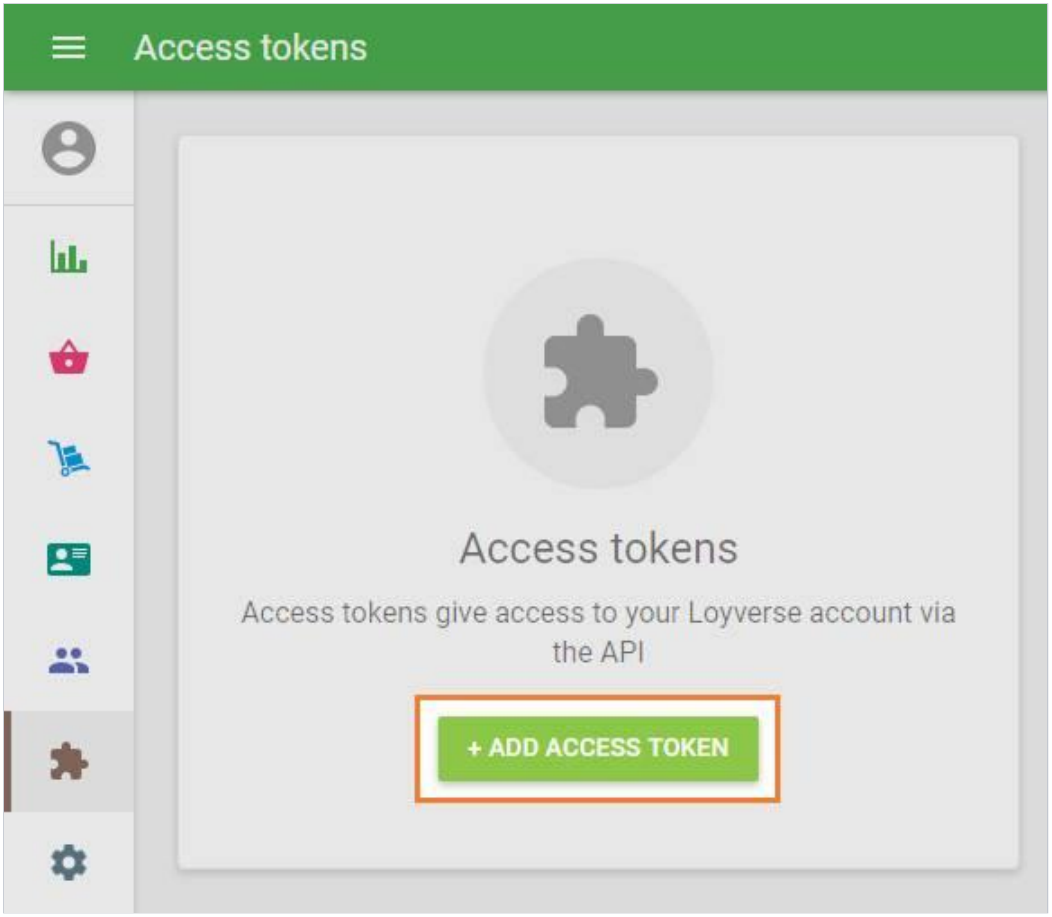
Video
https://www.youtube.com/watch?v=U_zLnWpcCRU

Access to the API is possible via https requests. Each request should contain the access key to the Loyverse account (token).

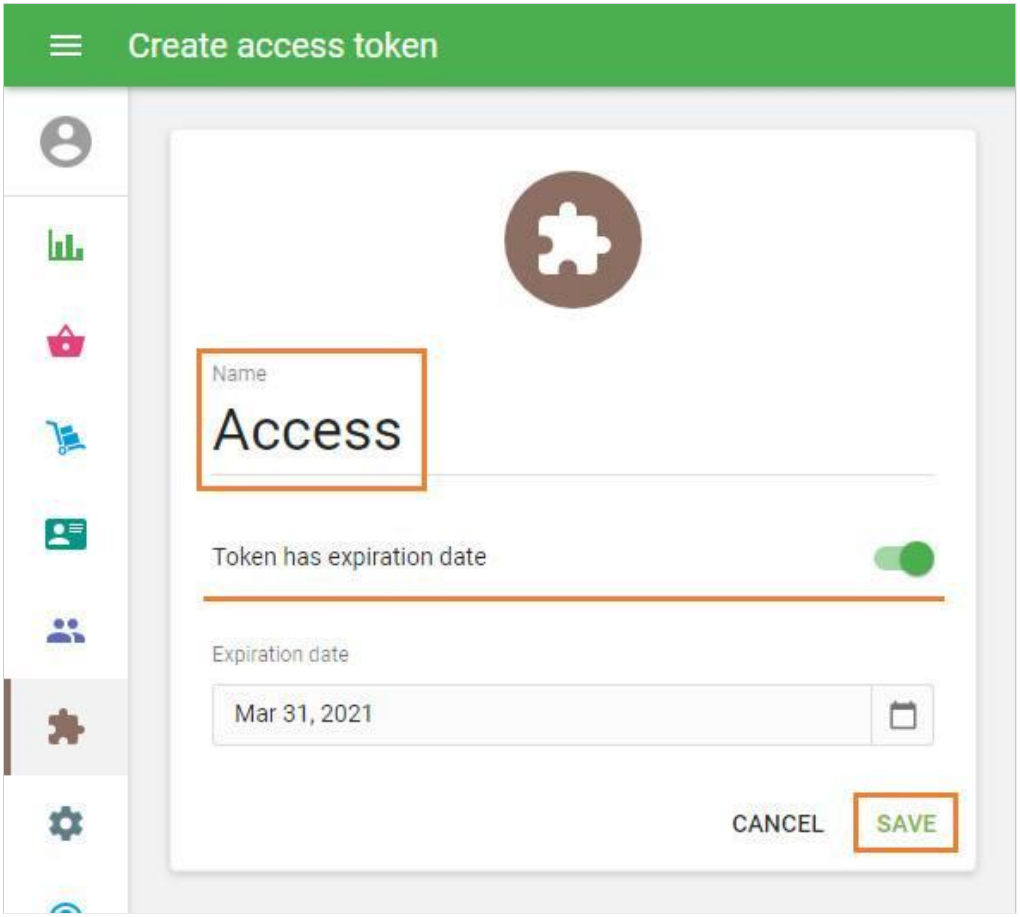
Enter the Back Office and open the 'Access Tokens' section.



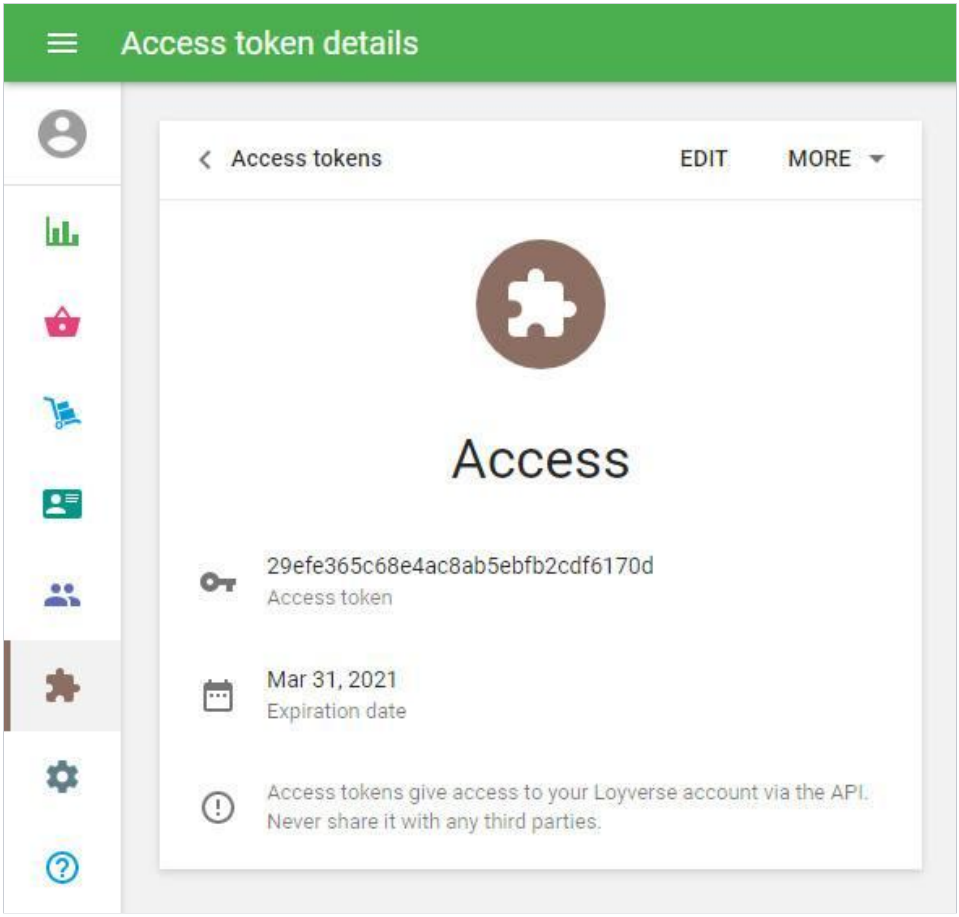
To create a new token, click on the '+ Add access token' button.



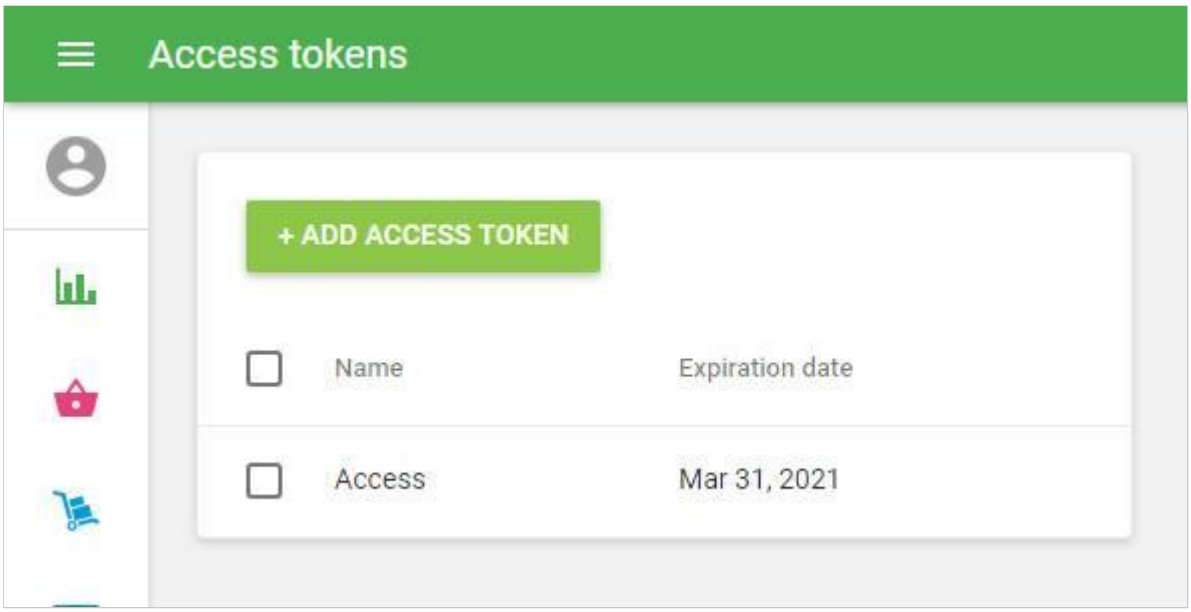
The form ‘Create access tokens’ will open for editing. Fill in the ‘Name’ field and set the token expiration date if needed. After clicking on the ‘Save’ button, the Access token will be created.



Here you can edit or delete the token and also copy the token for further use. If you delete the token, access to the data by this token will be suspended. By clicking on the ‘Access tokens,’ you will return to the tokens list.



You can see created tokens and create new ones.



Note: The token gives unlimited access to all resources provided by the Loyverse API. Up to 20 tokens can be created for one account.

See also:

[How to connect apps from the marketplace to Loyverse]

[API documentation]

To get more information about Loyverse API, [join the club of API testers].

Hardware

Printers

Supported Printers

Please pay attention not only to the printer model but also to the interface through which this model works. If some model of the printer works with one interface, it may not work through another interface.

Supported Printers for Android

Receipt printers compatible with Loyverse POS on **Android devices**:

- Star TSP650II / TSP654IIBI (Bluetooth);
- Star TSP 100 / TSP143IIILAN (Ethernet);
- Star mc-Print3 (USB, Bluetooth, Ethernet);
- Star mPOP (Bluetooth);
- Epson TM-m30 (USB, Bluetooth, Ethernet);
- Epson TM-m30II-SL (USB, Bluetooth, Ethernet);
- Epson TM-P20 (Bluetooth);
- Epson TM-T20II (Ethernet);
- Epson TM-T88IV (Ethernet);
- Epson TM-T88V (Ethernet);
- GP-L80250II (Ethernet);
- GP-58130IIC (Ethernet, Bluetooth);
- GP-U80300I (Ethernet);
- Posiflex Aura 6900 (Ethernet);
- Xprinter XP-Q200 (Ethernet);
- XPrinter XP-Q800 (Ethernet);
- EastRoyce ER-58A (Bluetooth);
- EastRoyce ER-80A (Bluetooth);

- Sam4s GIANT-100D (Ethernet, USB);
- Seiko RP-F10 LAN (Ethernet);
- Seiko MP-B20 (Bluetooth);
- Seiko MP-B30 (Bluetooth);
- Citizen CT-E651ET(Ethernet);
- Citizen CT-E651BT(Bluetooth);
- Bematech LR2000 (Ethernet).

However, for Android, you can try to connect another model, not from the Supported printers list. But be aware that not every printer may work with Loyverse POS!

How to Set Up Other Printers in Loyverse POS

Loyverse POS also works on Android POS terminals SunMi and iMin which have built-in receipt printers.

Supported Printers for iOS

These are general requirements for a receipt printer to be compatible with Loyverse POS on **iOS devices**:

- support ESC/POS protocol;
- have Ethernet, Bluetooth, or USB (Bluetooth and USB only recommended models) interface.

Consult the printer manual or manufacturer's website to see if your receipt printer fits these requirements. If so, the printer may work with Loyverse POS, however, there might be special cases. To be 100% sure, please use a printer from the list of recommended models below:

- Star TSP654IIBI (Bluetooth);
- Star mPOP (Bluetooth);
- Star TSP 100 (Ethernet);
- Star TSP143IIILAN (Ethernet);
- Star TSP654IILAN (Ethernet);
- Star SP742 (Ethernet) **Note:** this is a matrix printer, it can print only kitchen orders and cannot print bills and receipts;
- Star TSP143IIIU (USB);
- Star mC-Print3 (USB, Bluetooth, Ethernet);

- Star SM-T300i (Bluetooth);
- Star SM-S210i (Bluetooth);
- Epson TM-T20II (Ethernet);
- Epson TM-T88VI-i (Ethernet);
- Epson TM-m30 (Ethernet, Bluetooth);
- Epson TM-m30II-SL (Ethernet, Bluetooth);
- Epson TM-P20 (Bluetooth);
- Sam4s GIANT-100D (Ethernet);
- Seiko RP-F10 LAN (Ethernet);
- Citizen CT-E651ET(Ethernet).

See also:

How to Set Up an Ethernet Printer in Loyverse POS

How to Set Up a USB Printer with an Android Device

How to Set Up Bluetooth Receipt Printer with Loyverse POS

How to Set Up STAR 100 Ethernet Printer to iOS

Troubleshooting When Setting Up an Ethernet Printer

Hardware for Loyverse POS

Using Kitchen Printers with Loyverse POS

How to Set Up an Ethernet Printer in Loyverse POS



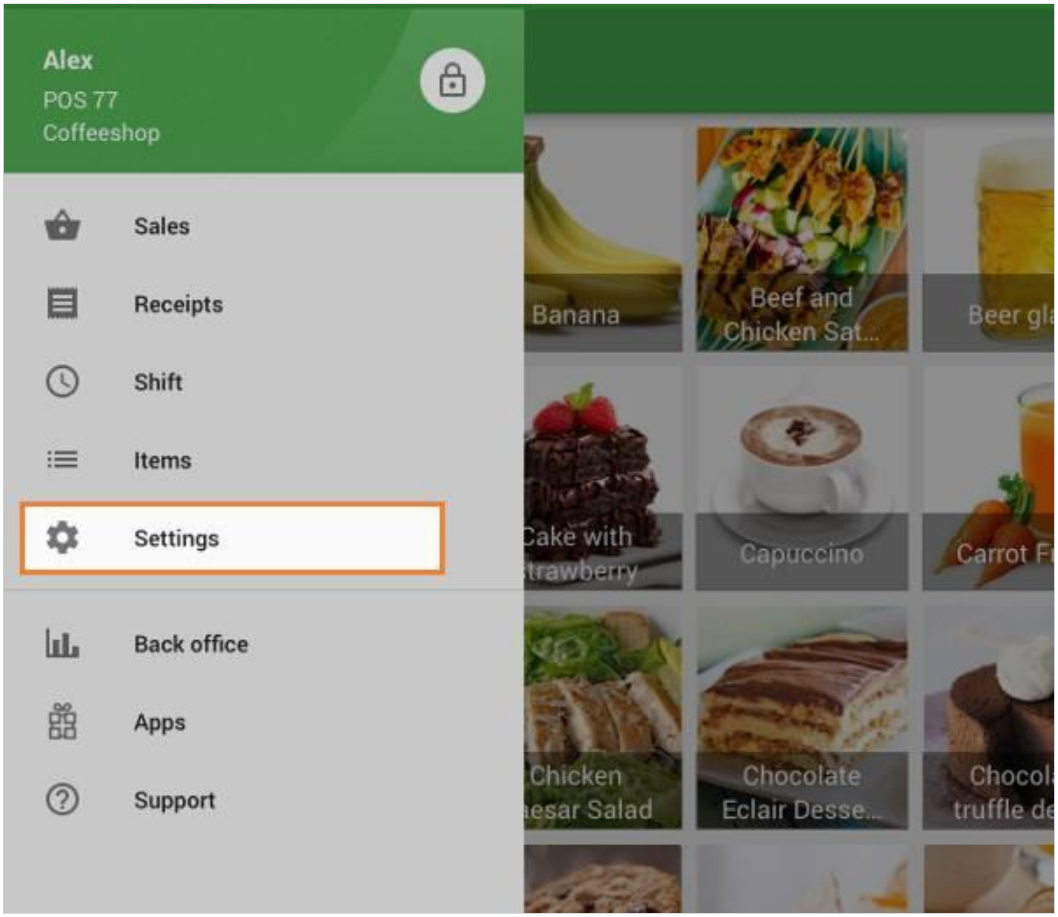
Video
https://www.youtube.com/watch?v=Q99maaOzBsk

For an Ethernet printer to work with Loyverse POS (Android, iOS), you will need the following:

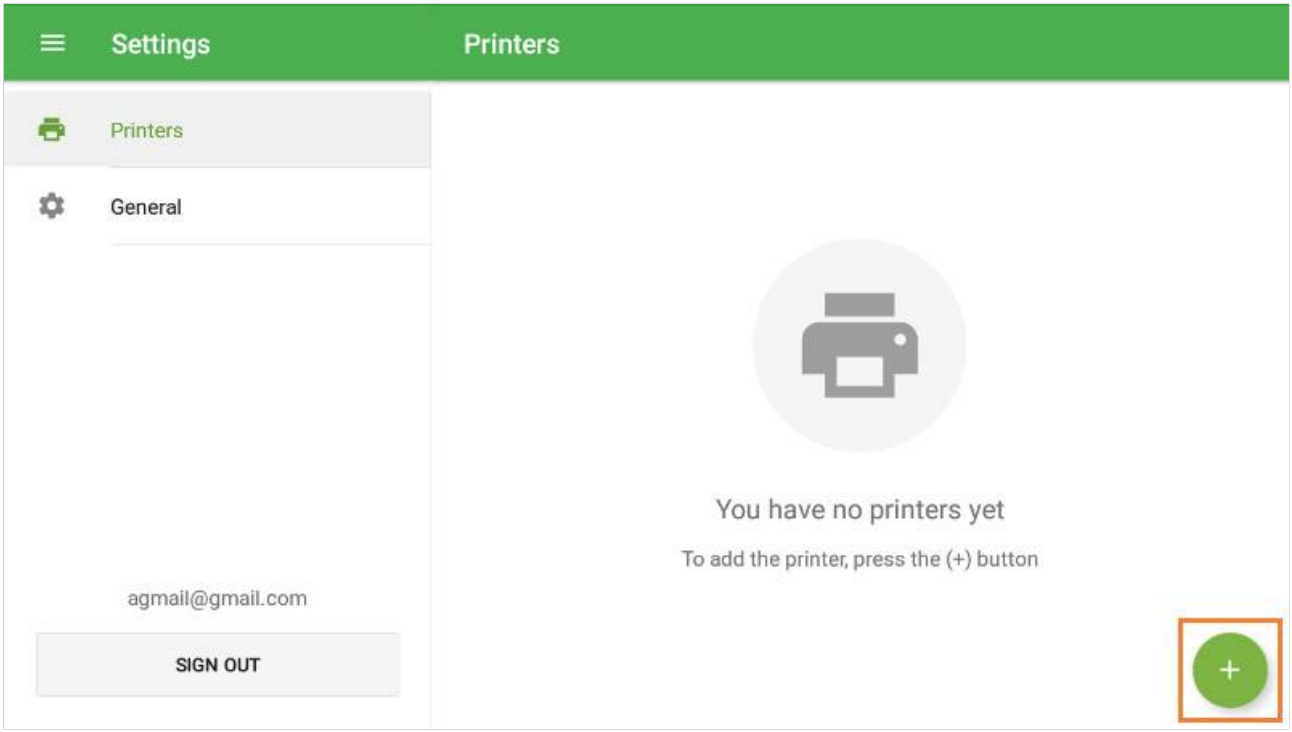
- Smartphone or tablet with the Loyverse POS app
- Ethernet printer, supported by the Loyverse POS app (see the list of Supported Printers)
- Wi-Fi router
- Ethernet cable

Plug one end of the ethernet cable into the 100/10 Base port of the printer, and the other end into the LAN port of the router.

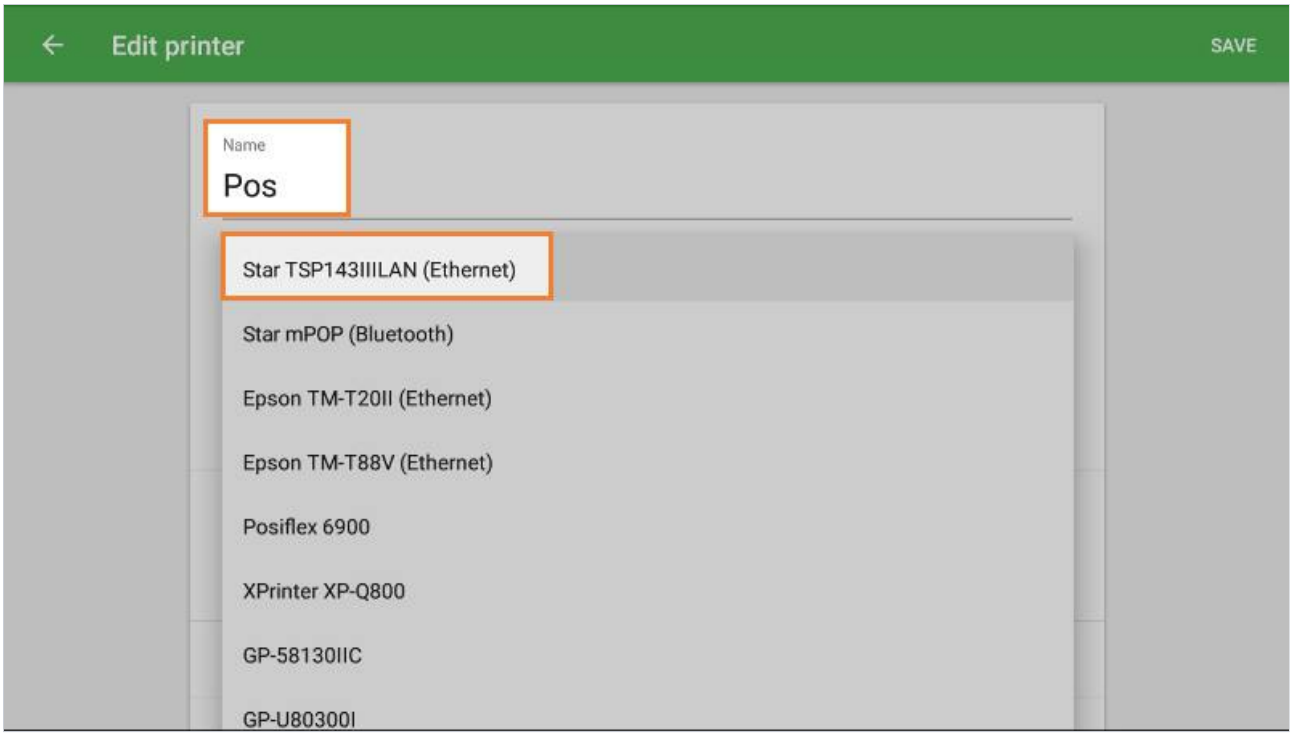
Then in the Loyverse POS app, go to Settings.



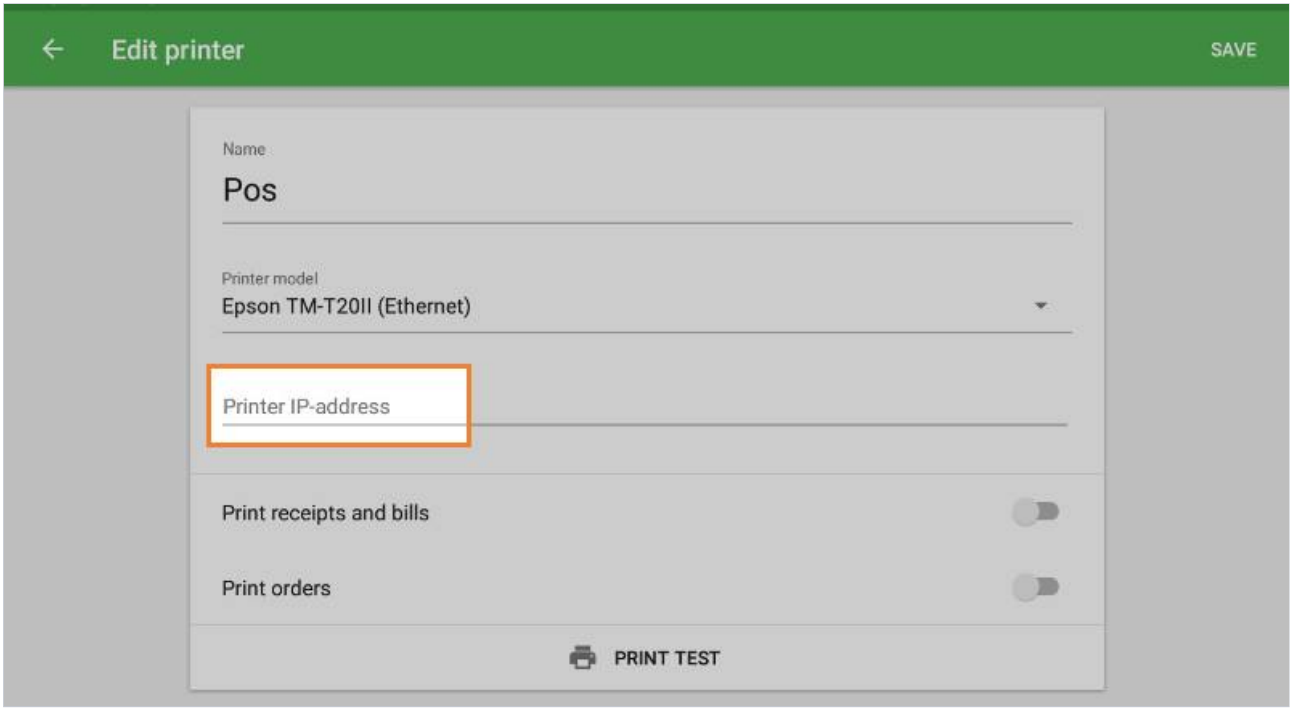
Create a printer by tapping on the '+' button.



Type the title of your printer in the ‘Name’ field and select your printer model from the drop-down list.



Fill in the ‘Printer IP-address’ field that you can find in your printer's network configuration report (details: Troubleshooting When Setting Up an Ethernet Printer).

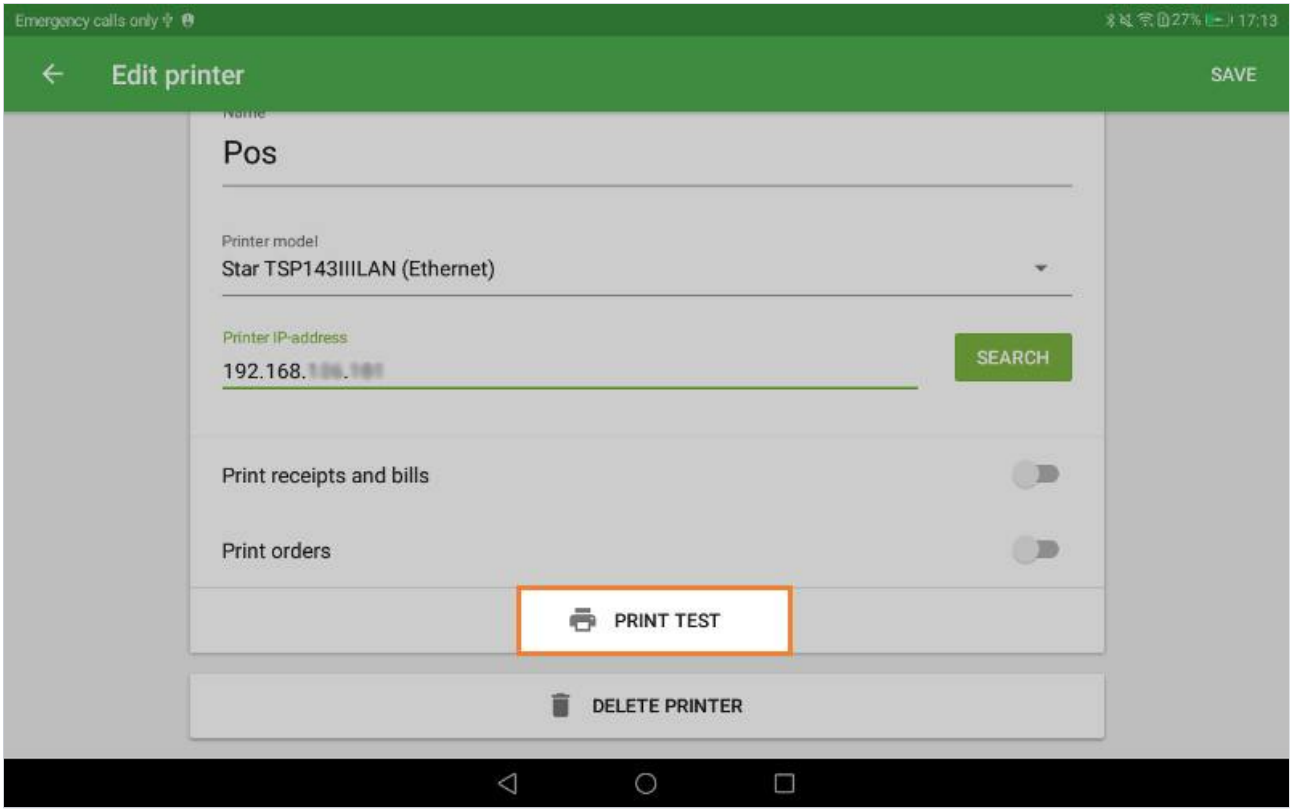


Some printers have the ‘Search’ button to search for the IP address of your printer automatically. If your Ethernet printer has it, just tap it without filling in the ‘Printer IP-address’ field.

In the following pop-up window, you will see the search result with the printer model and its IP address. Tap on it to select the IP address and then close the window.



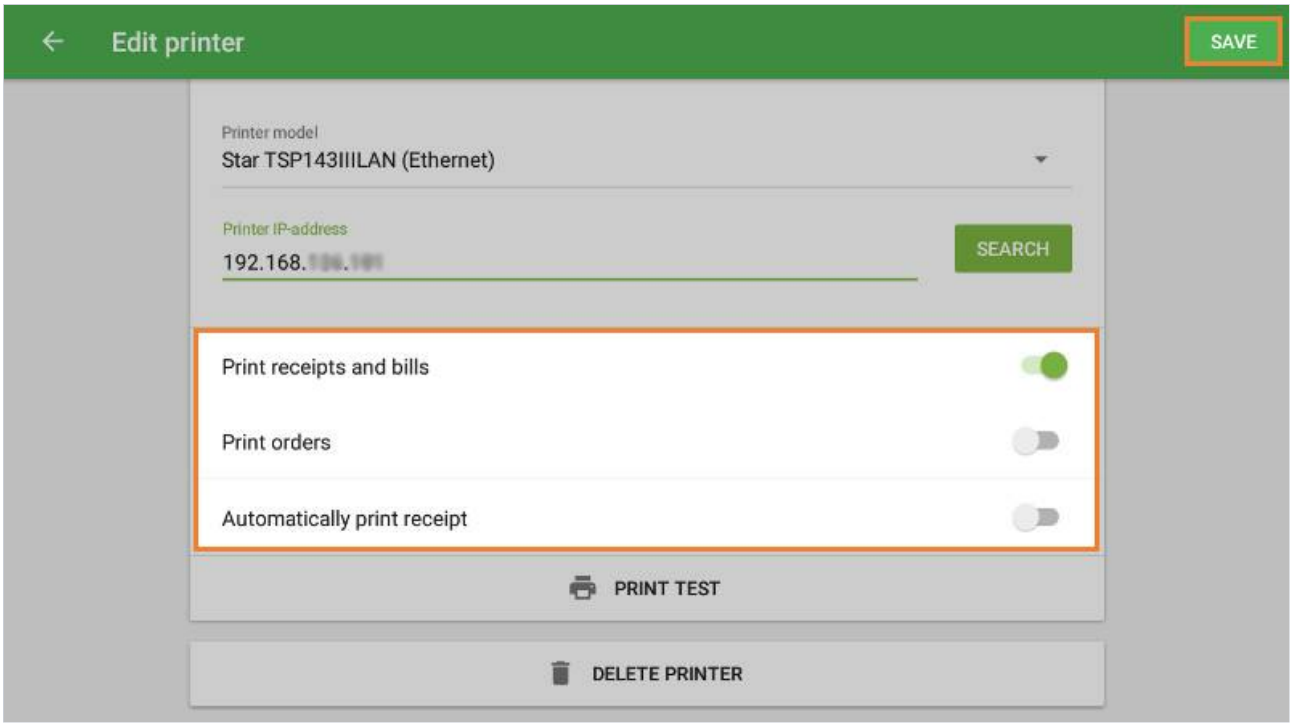
Tap the ‘Print test’ button to test your printer’s connection with the Loyverse POS app.



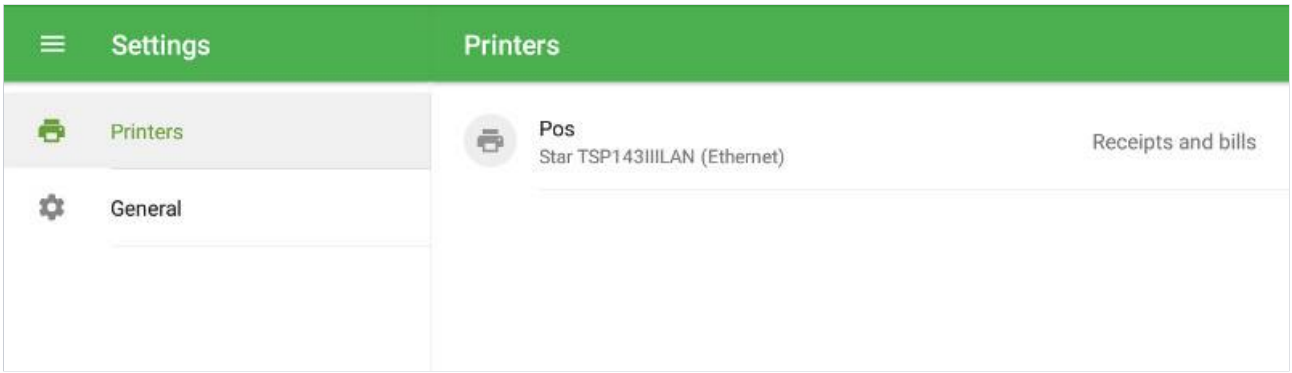
If a test receipt prints out successfully, then your printer is set up correctly.



Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the ‘Save’ button.



Now you can see your printer in the list. Nice work!



Note: Some Ethernet printers also have a WiFi interface. You can connect them to Loyverse via WiFi in the same way as via Ethernet.
The Star TSP 143III printer connects via WiFi and works on iOS and Android only with the Star Quick Setup Utility application installed on the device. Star Quick Setup Utility on iOS and Android.

See also:

Troubleshooting When Setting Up an Ethernet Printer

How to Set Up Other Printers in Loyverse POS on Android

How to Set Up Other Printers in Loyverse POS on iOS

How to Print Bill

How to Set Up a USB Printer with an Android Device

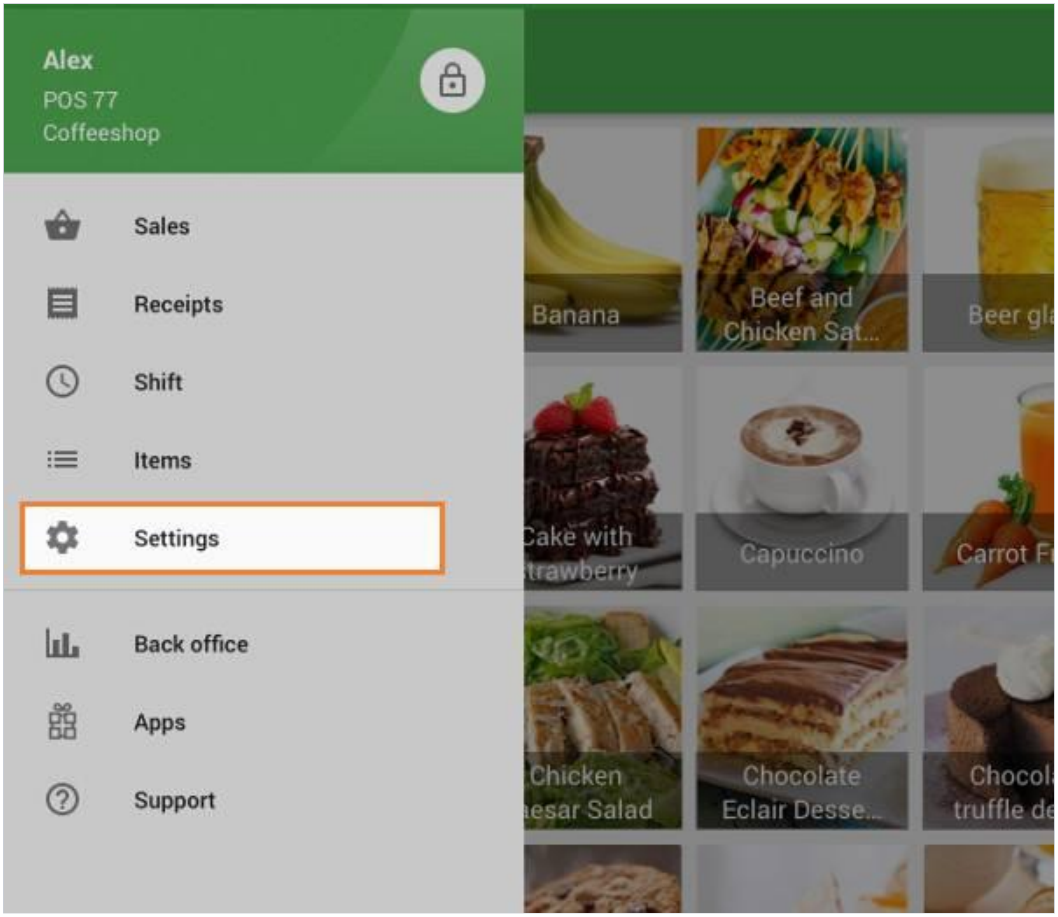
For a USB printer to work with Loyverse POS, you will need the following

- Smartphone or tablet (with OTG support) with the Loyverse POS app
- USB printer, supported by the Loyverse POS app (should support ESC/POS protocol, see also a list of Supported Printers)
- USB type A to type B cable (goes together with the printer)
- USB OTG adapter or cable
- USB Hub if you want to connect several printers

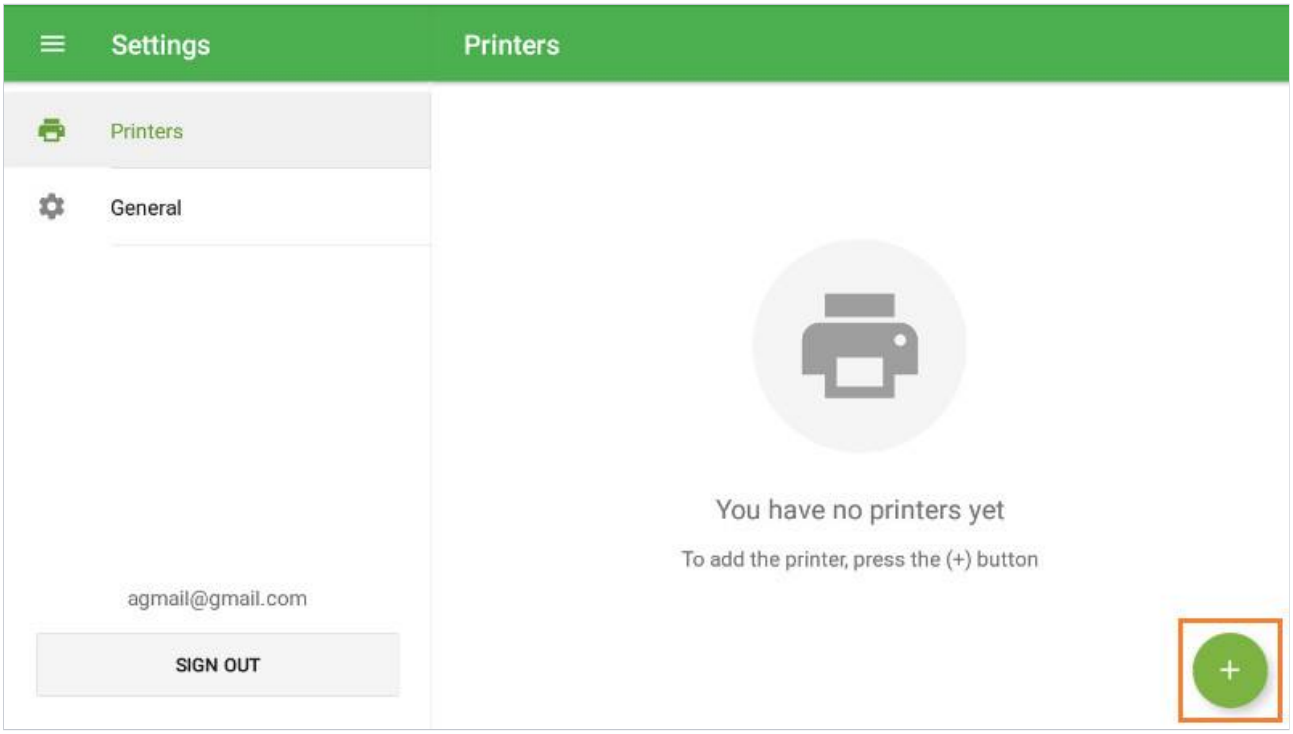
Plug one end of the USB cable into the USB port of the printer, and the other end into the female USB connector of an OTG adapter or cable. Then, plug the micro-USB end of the OTG adapter or cable into the micro-USB port of your mobile device, and wait for the system to recognize the printer.

If you want to connect several printers, connect them via the USB Hub. The USB Hub connects to your mobile device through a USB OTG adapter or a cable.

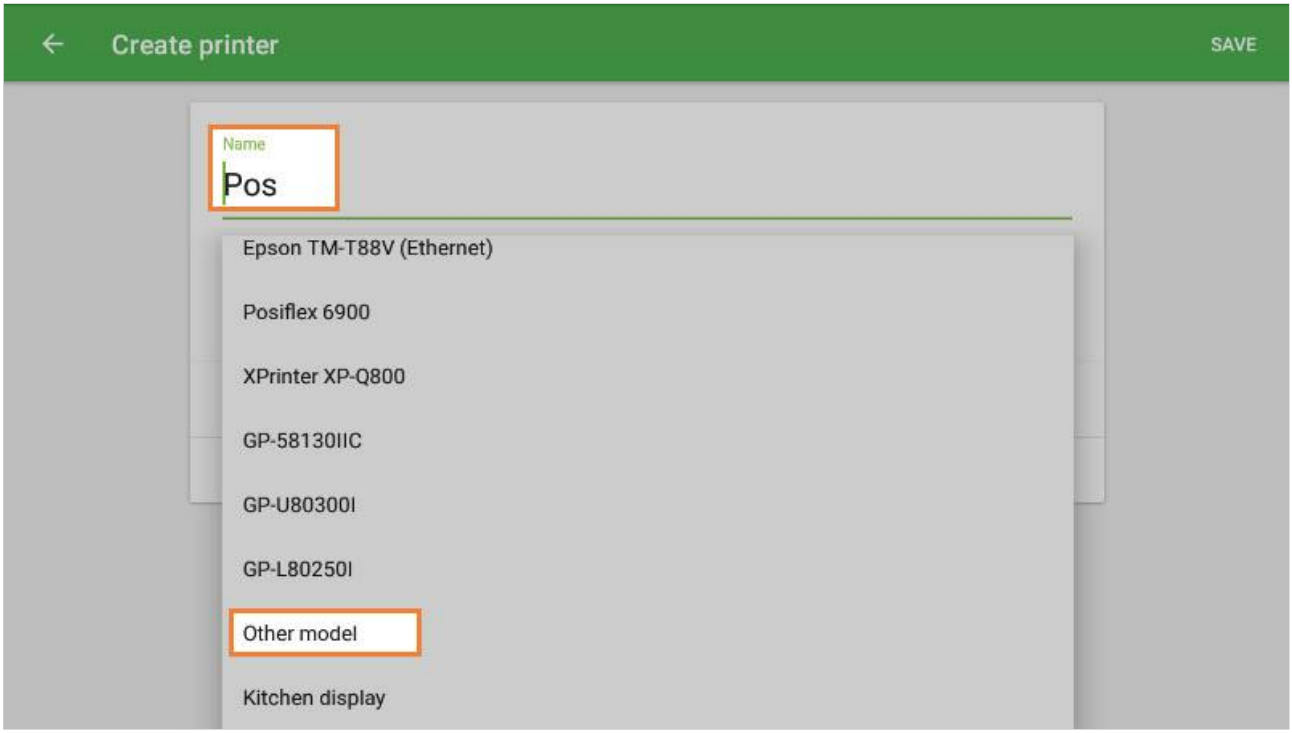
Then, in the Loyverse POS app, go to Settings.



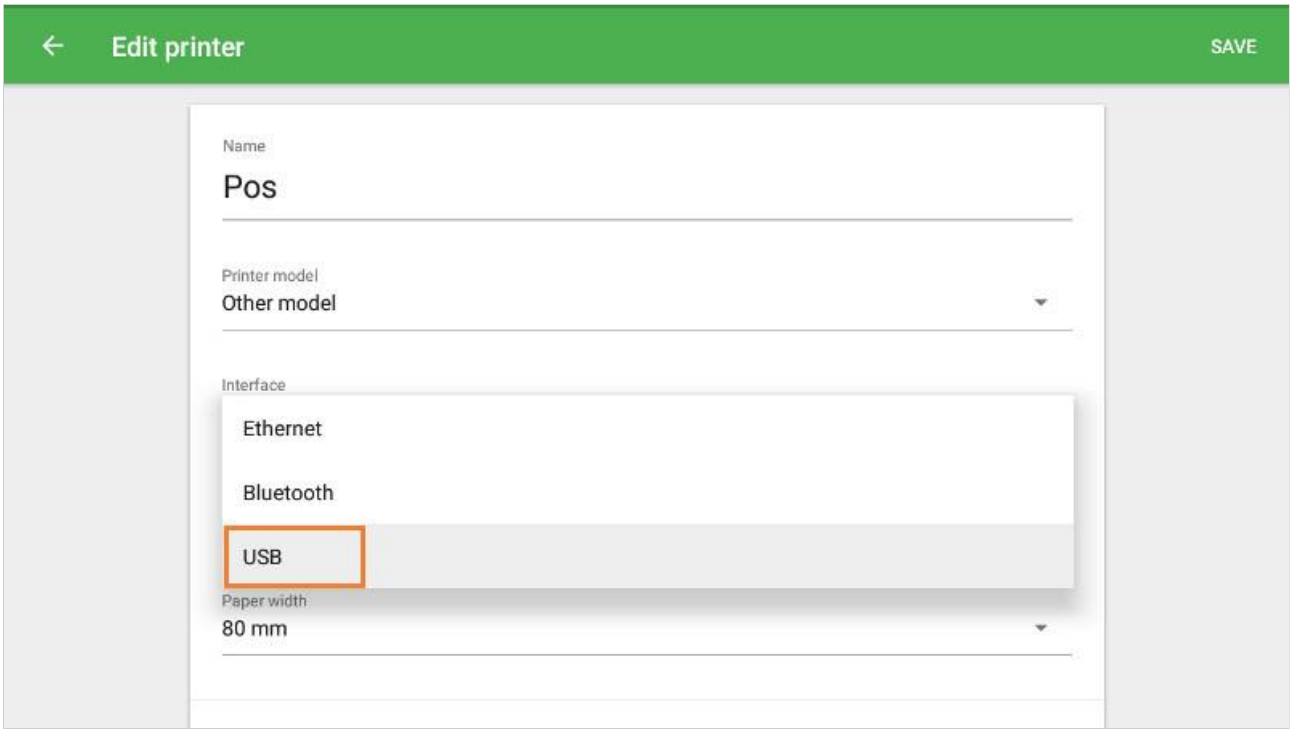
Create a printer by tapping on the '+' button.



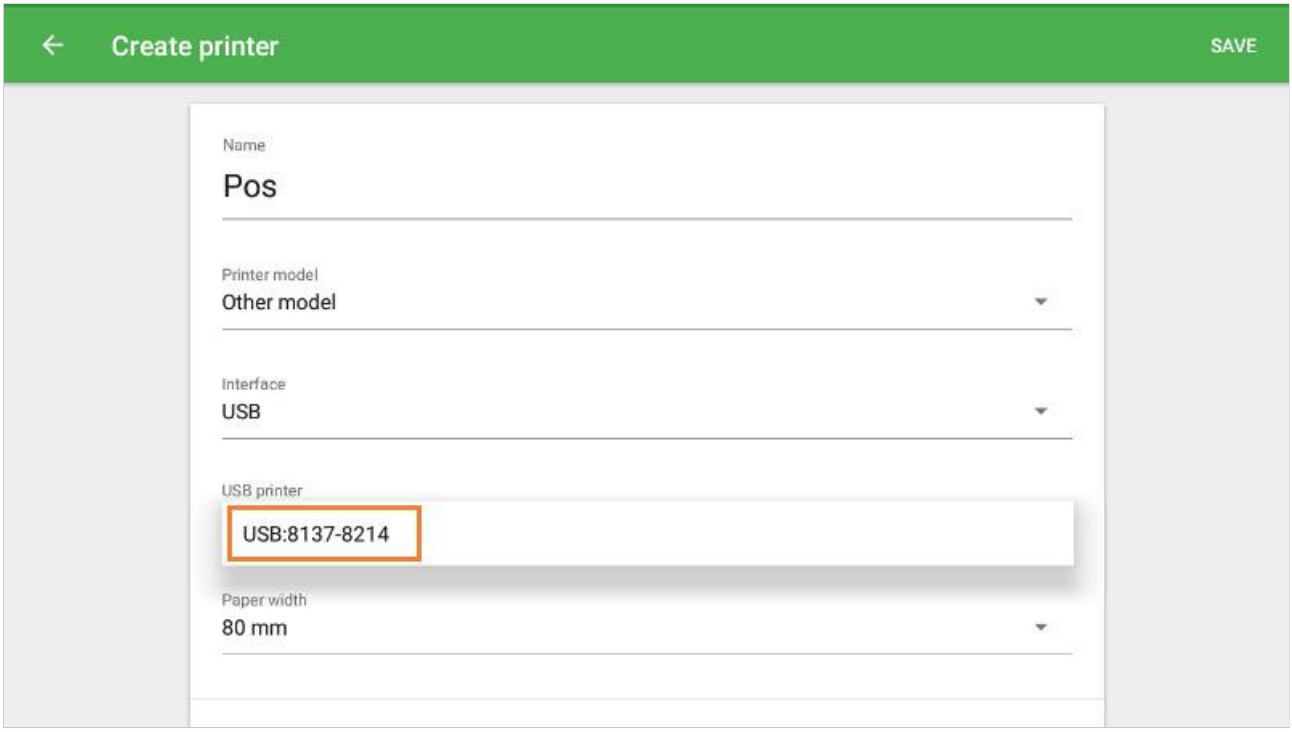
Name your printer in the 'Name' field and select 'Other model' from the 'Printer model' list.



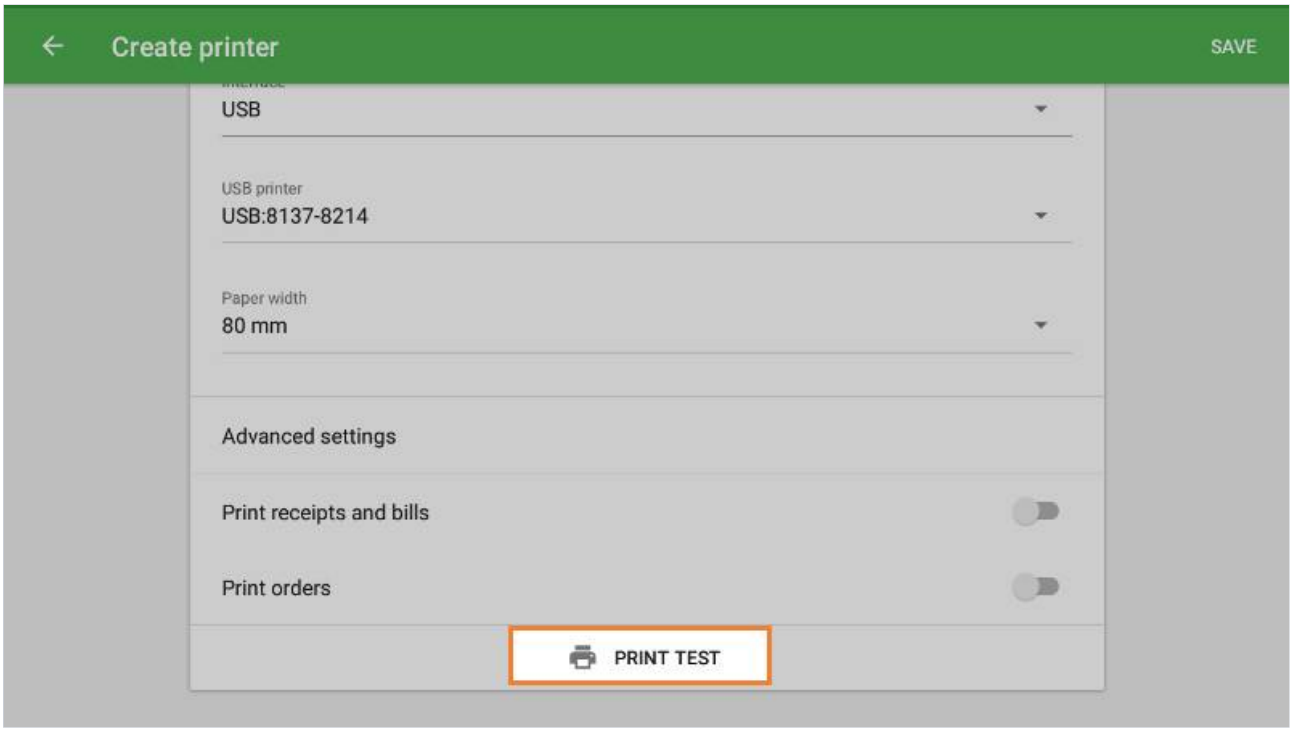
Select ‘USB’ in the ‘Interface’ field.



Now, select your printer from the drop-down menu. USB Printers are named in USB: VID-PID format. VID stands for Vendor ID, and PID is the Product ID.



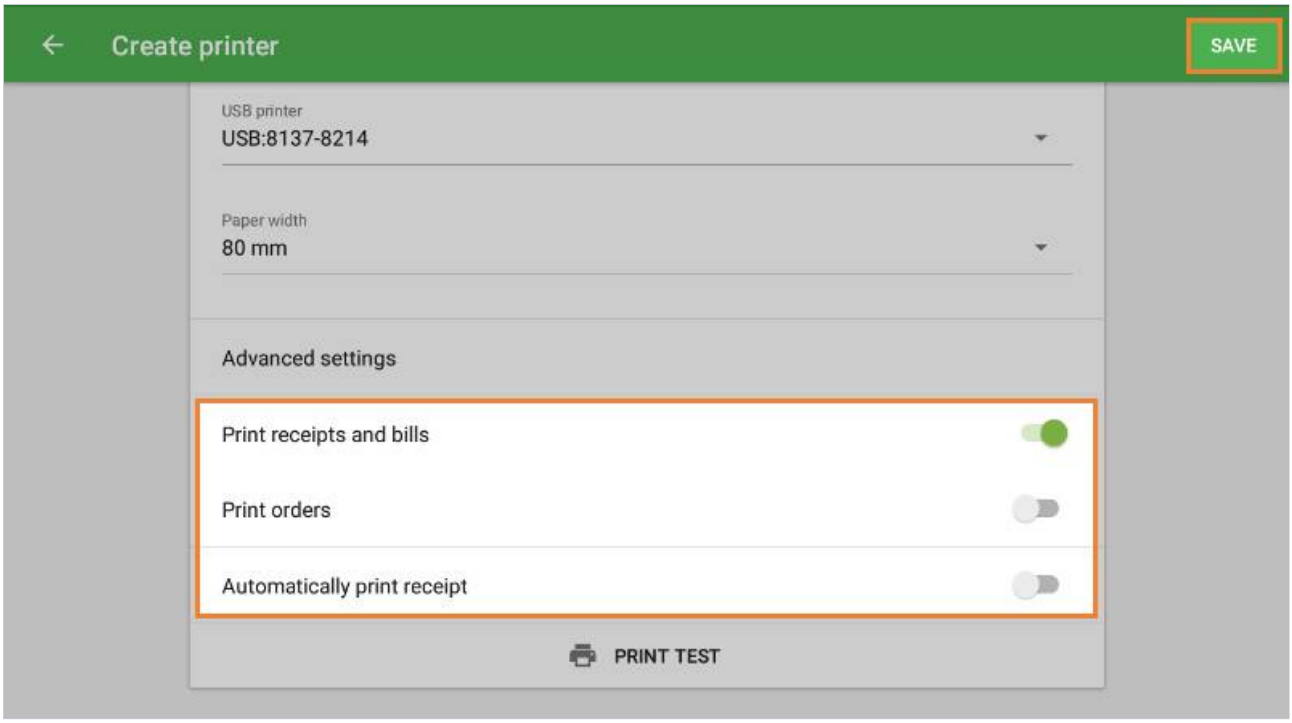
Tap the ‘Print test’ button to test your printer’s connection with the Loyverse POS app.



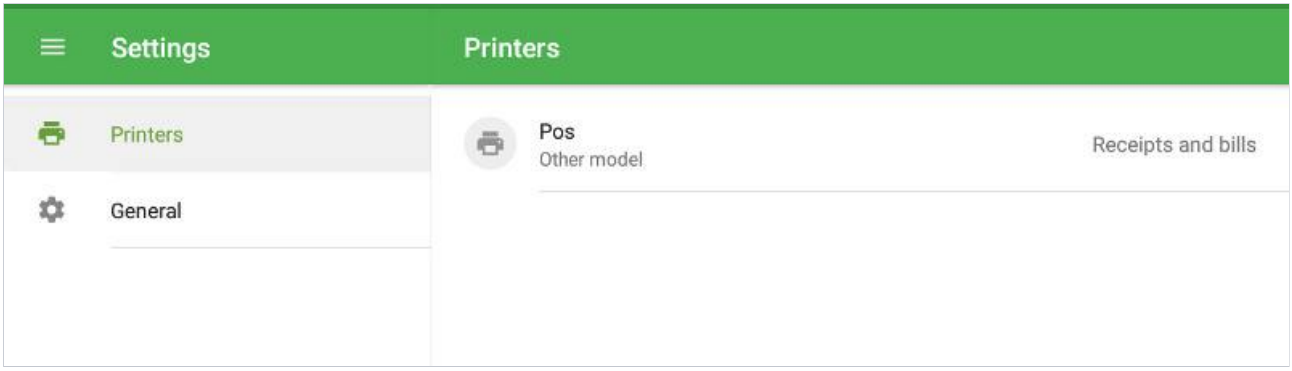
If a test receipt prints out successfully, then your printer is set up correctly.



Choose the settings for your printer depending on how you want to use it. Don't forget to save all of the settings at the end, by tapping on the ‘Save’ button.



Now you can see your printer in the list. Nice work!



See also:

How to Set Up Other Printers in Loyverse POS

How to Set Up a USB Printer with an iOS Device

For a USB printer to work with Loyverse POS on iOS, you will need the following:

- iPad or iPhone with the Loyverse POS app
- USB printer, supported by the Loyverse POS app on iOS devices (currently only supports Star TSP143IIIU (USB) and Star mc-Print3 (USB) models. **Other USB printers will not work**. See Supported Printers list)
- Lightning cable - please use a genuine cable manufactured by Apple or one that is MFi-certified

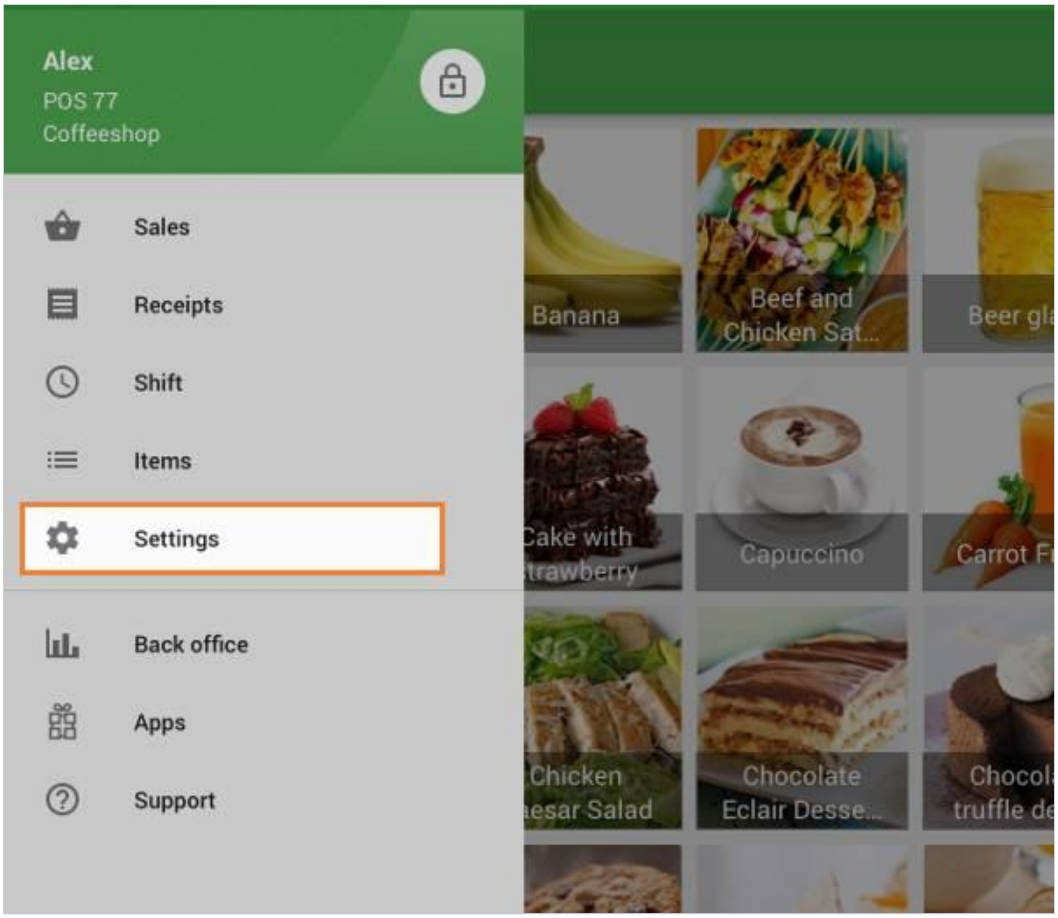
Connect the Lightning cable to the USB Type-A port of the printer.



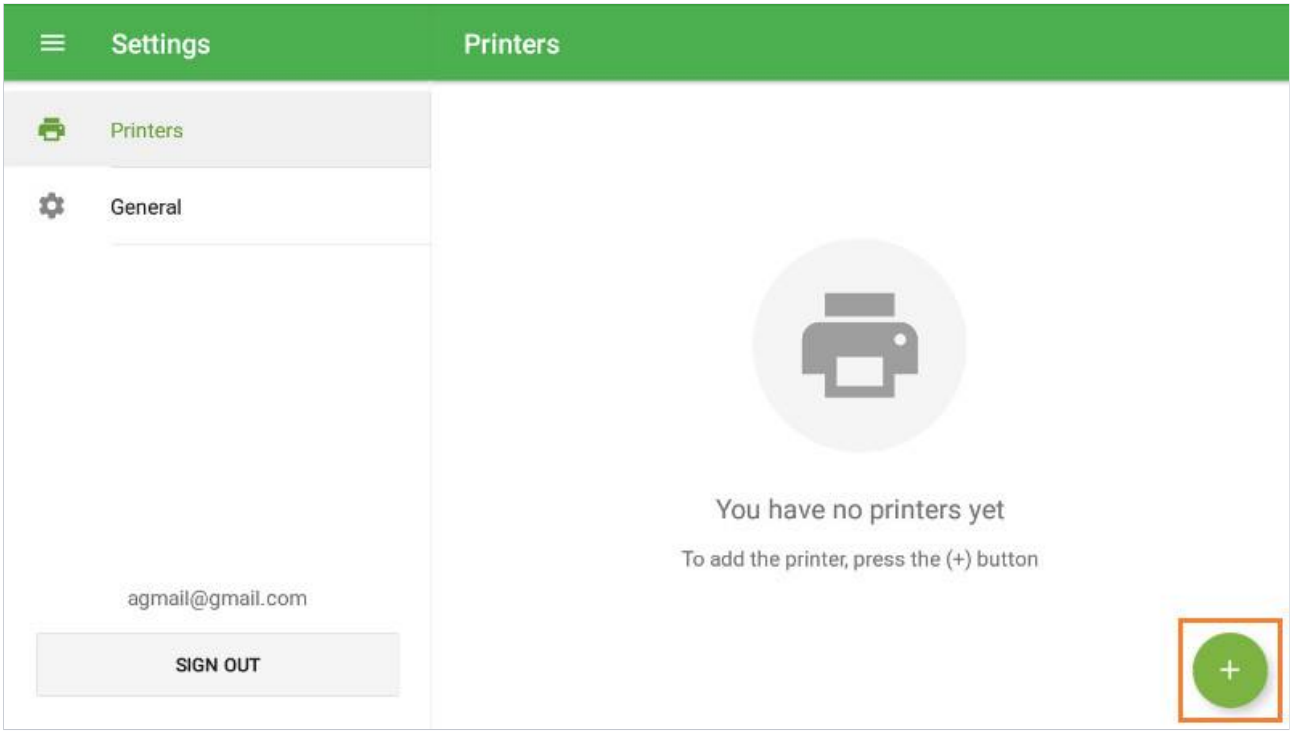
Connect the other end of the cable to the smartphone/tablet.



Then in the Loyverse POS app, go to Settings.

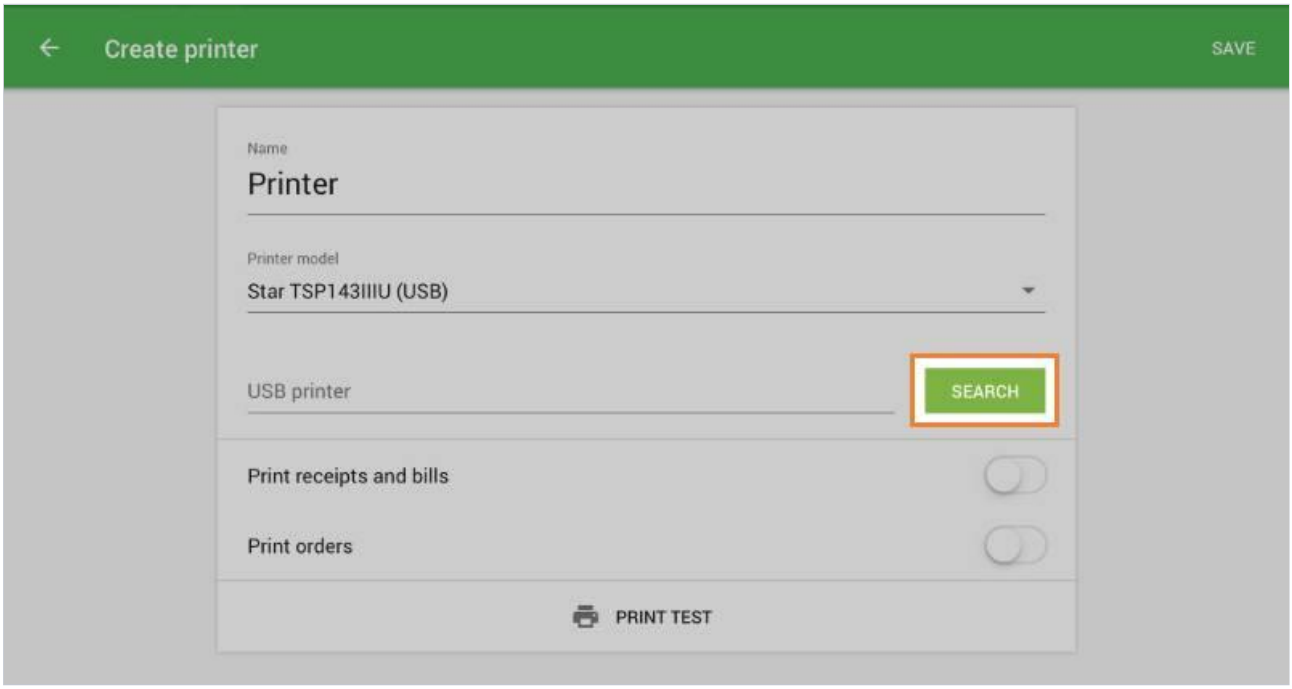


Create a printer by tapping on the '+' button.



Name your printer in the ‘Name’ field and select the model of your USB printer from the ‘Printer model’ list.

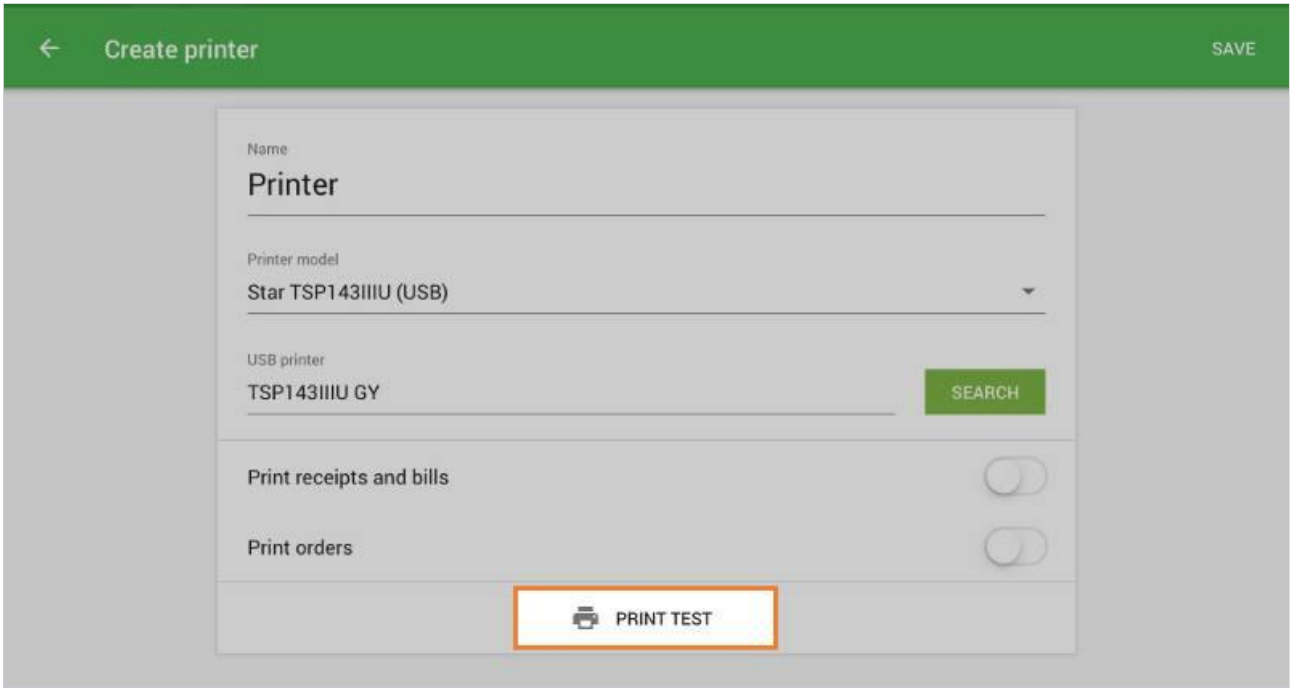
Tap the ‘Search’ button to search for your printer.



In the following pop-up window, you will see the search result with the printer model. Tap to select and close the window by tapping ‘OK’.



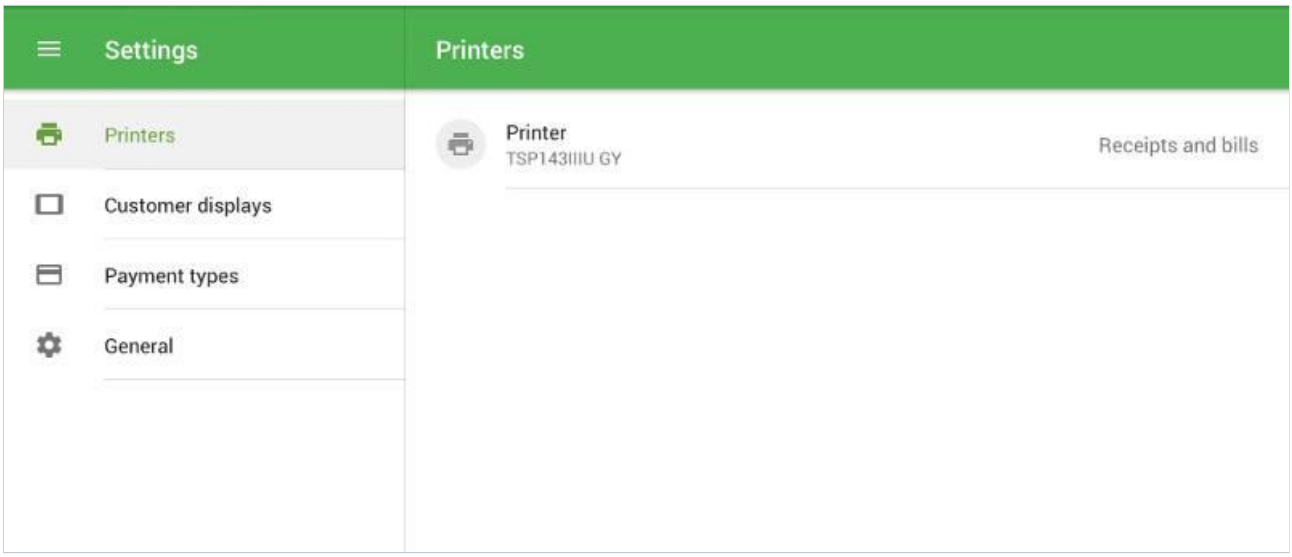
Tap the ‘Print test’ button to test your printer’s connection with the Loyverse POS app.



If a test receipt prints out successfully, then your printer is set up correctly.

Choose the settings for your printer depending on how you want to use it. Don't forget to save all of the settings at the end by tapping the ‘Save’ button.

Now you can see your printer in the list. Nice work!



See also:

[How to Set Up a USB Printer with an Android Device]

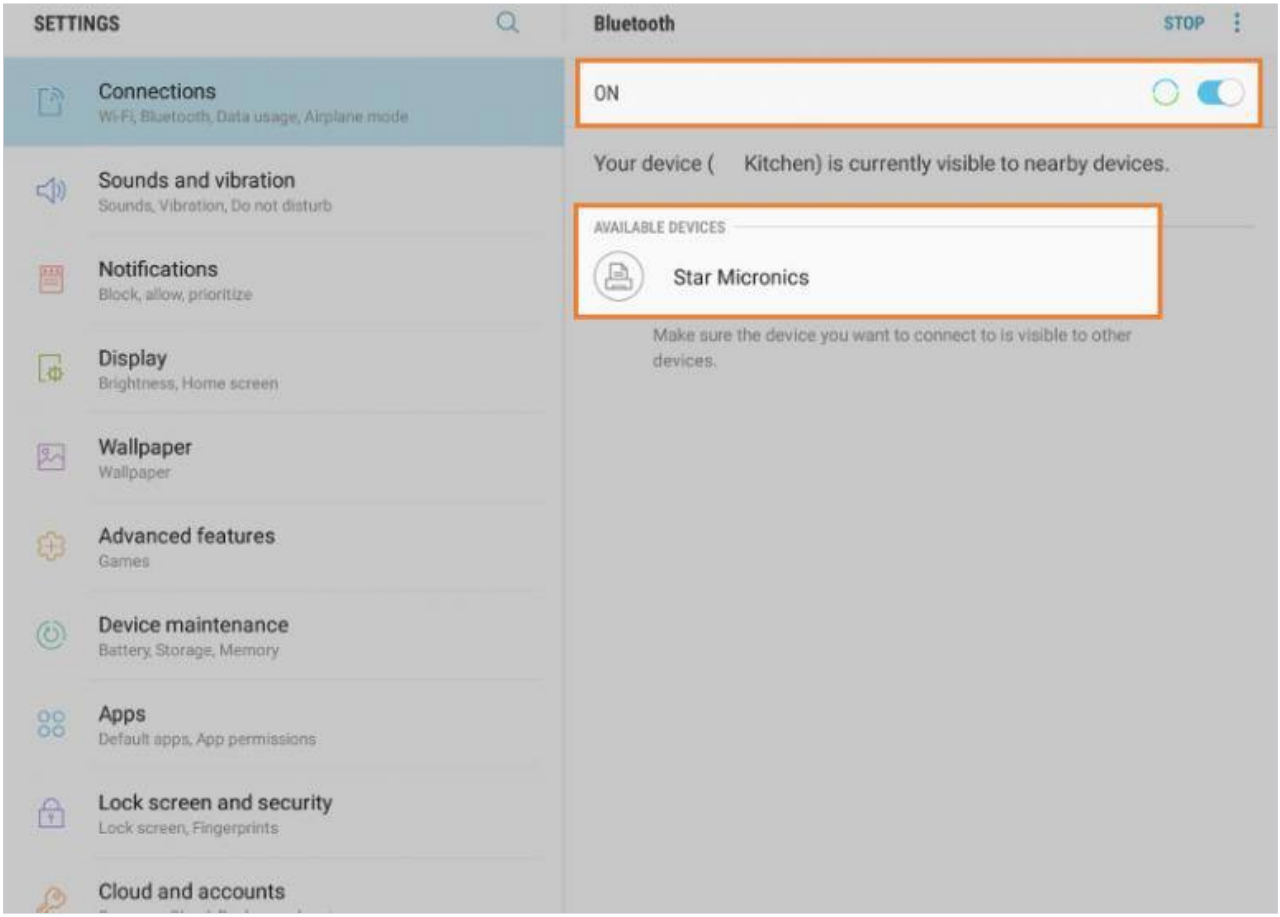
How to Set Up Bluetooth Receipt Printer with Loyverse POS

Video
https://www.youtube.com/watch?v=hFnjsj30kXI

This guidance applies to printers on our supported printers list.

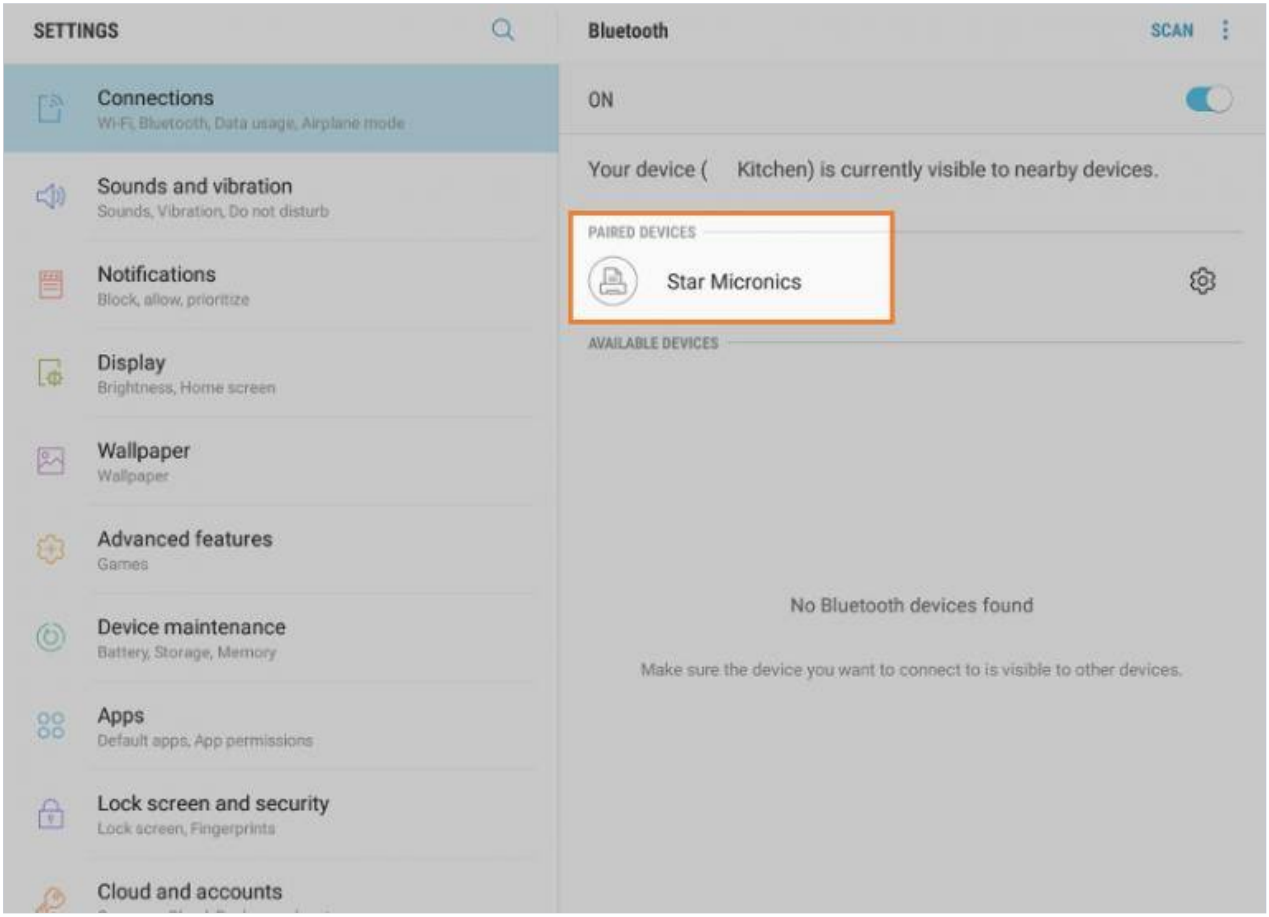
First, you have to pair a printer with your mobile device.

Turn on your printer. In your mobile device, go to Settings > Bluetooth, and turn the 'Bluetooth' on. A Bluetooth device search will begin, and you will see your printer on the list.

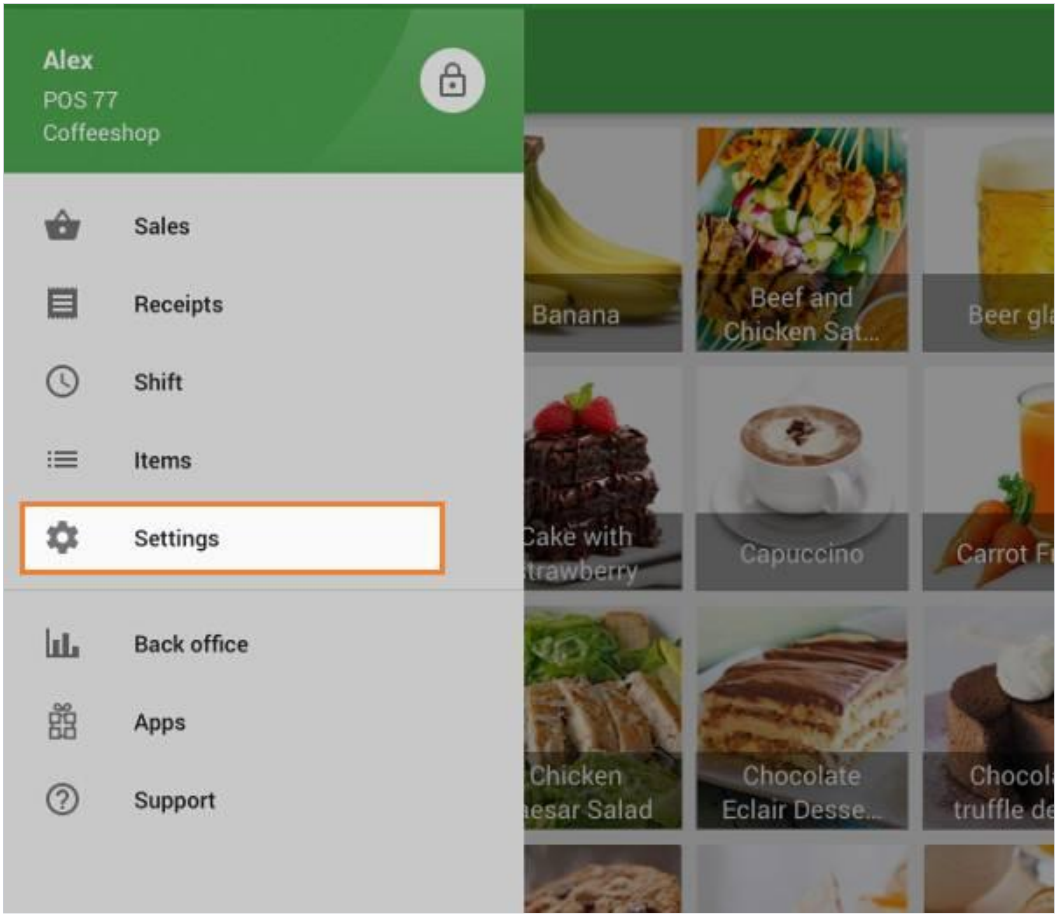


Push the 'Pair' button on your printer.

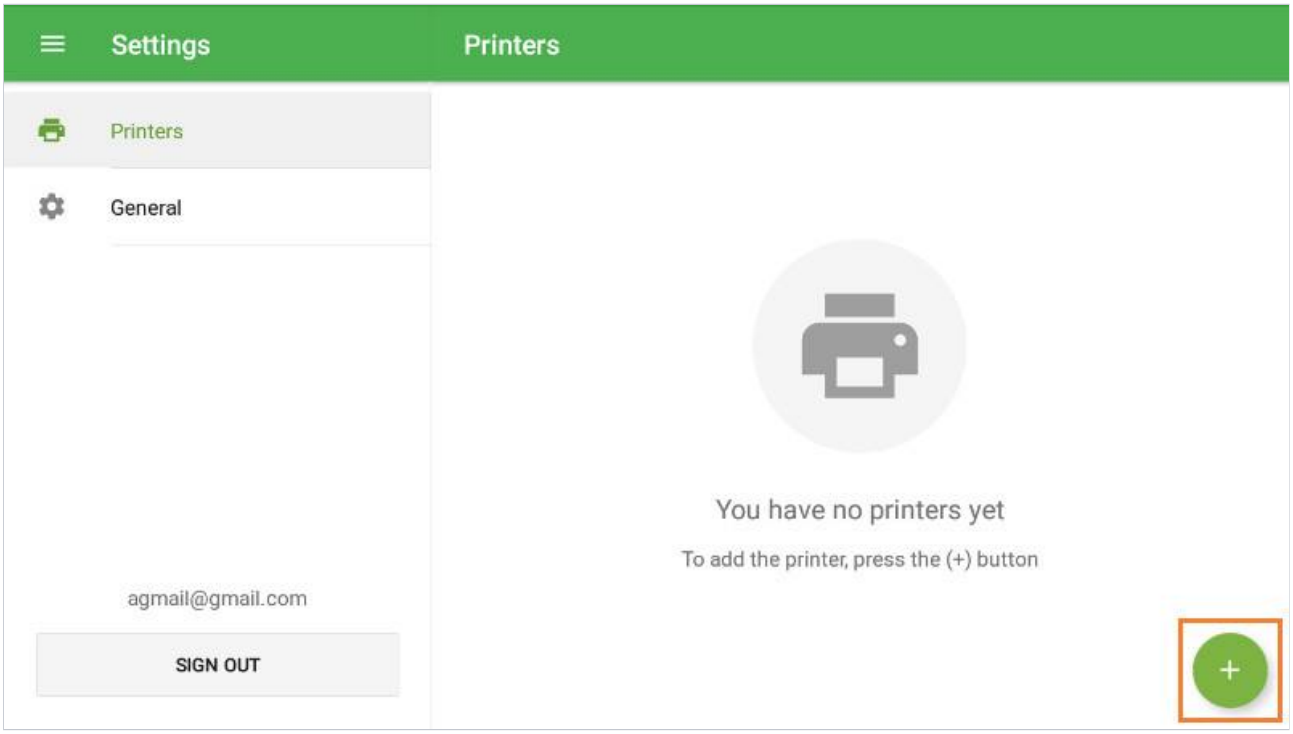
On your mobile device, choose your printer's model from the list of 'Devices'. After a few seconds, the 'Not Paired' status will change to 'Connected' or 'Paired'.



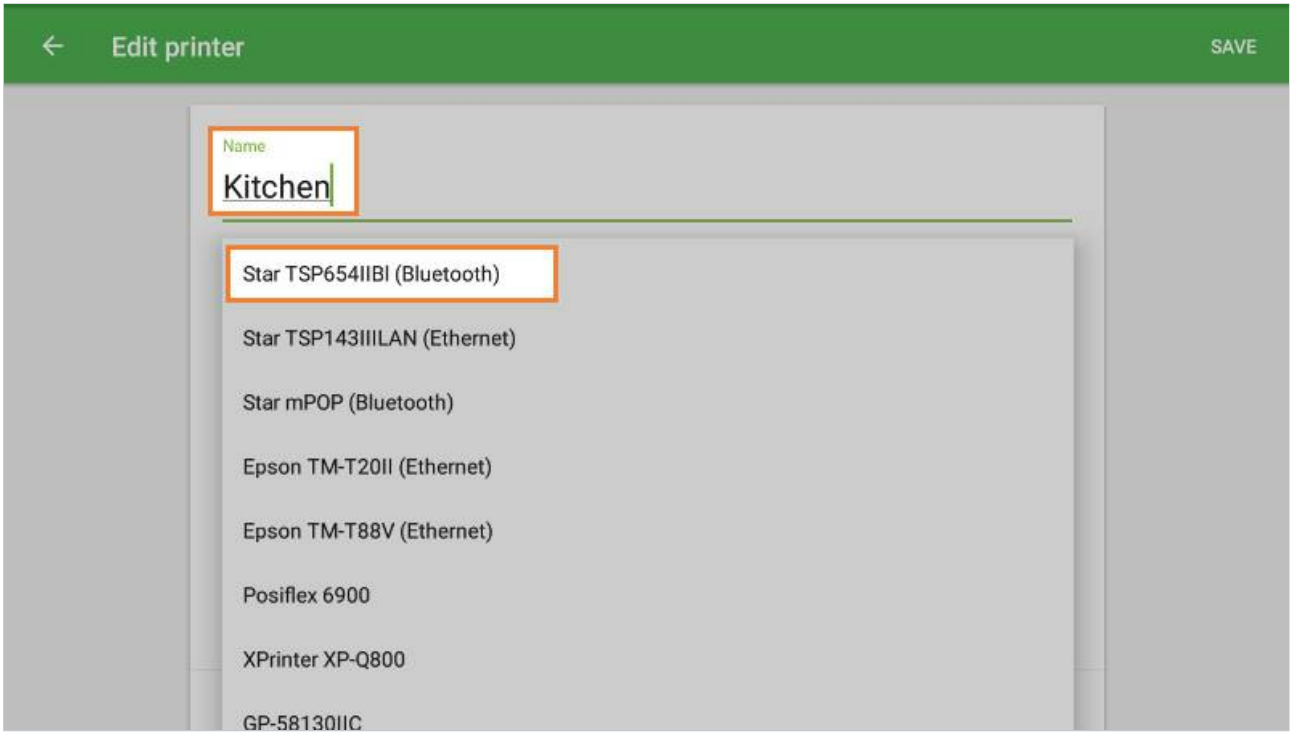
Then, in the Loyverse POS app (Play Market or App Store), go to Settings.



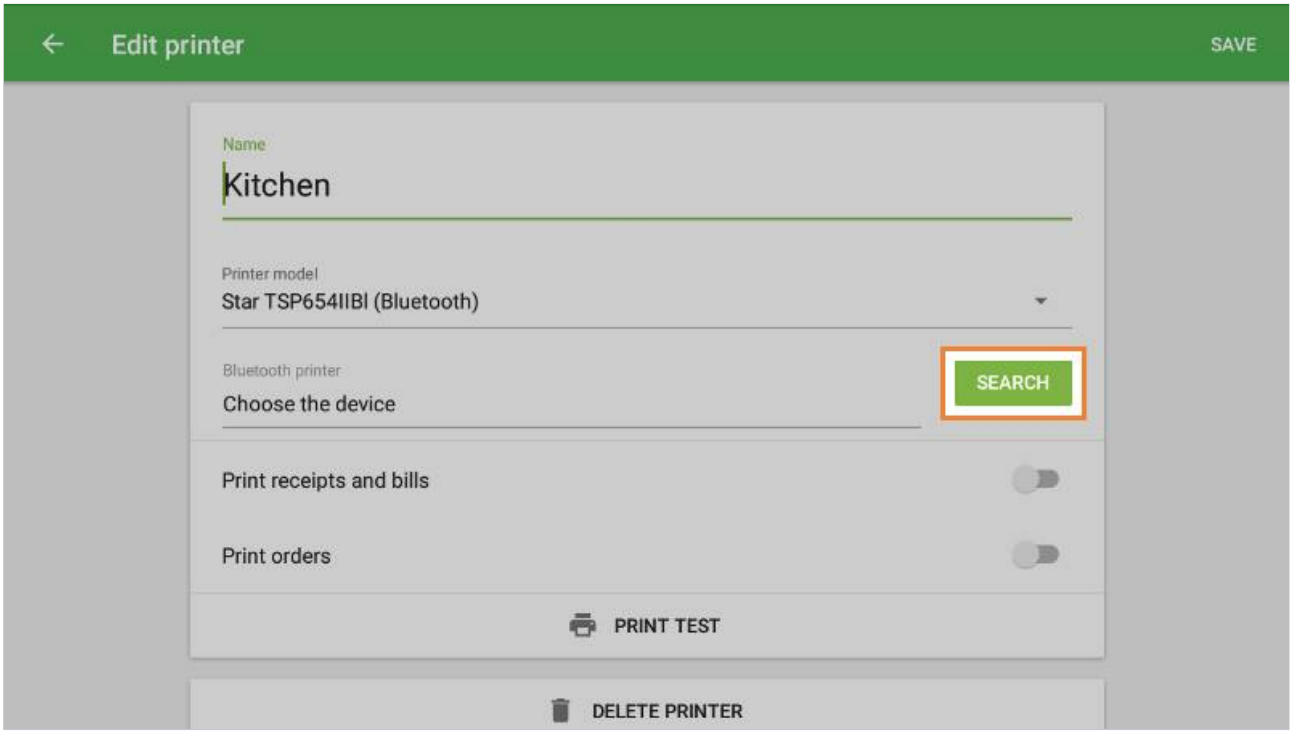
Create a printer by tapping on the '+' button.



Type the title of your printer in the 'Name' field and select its model from the drop-down menu.



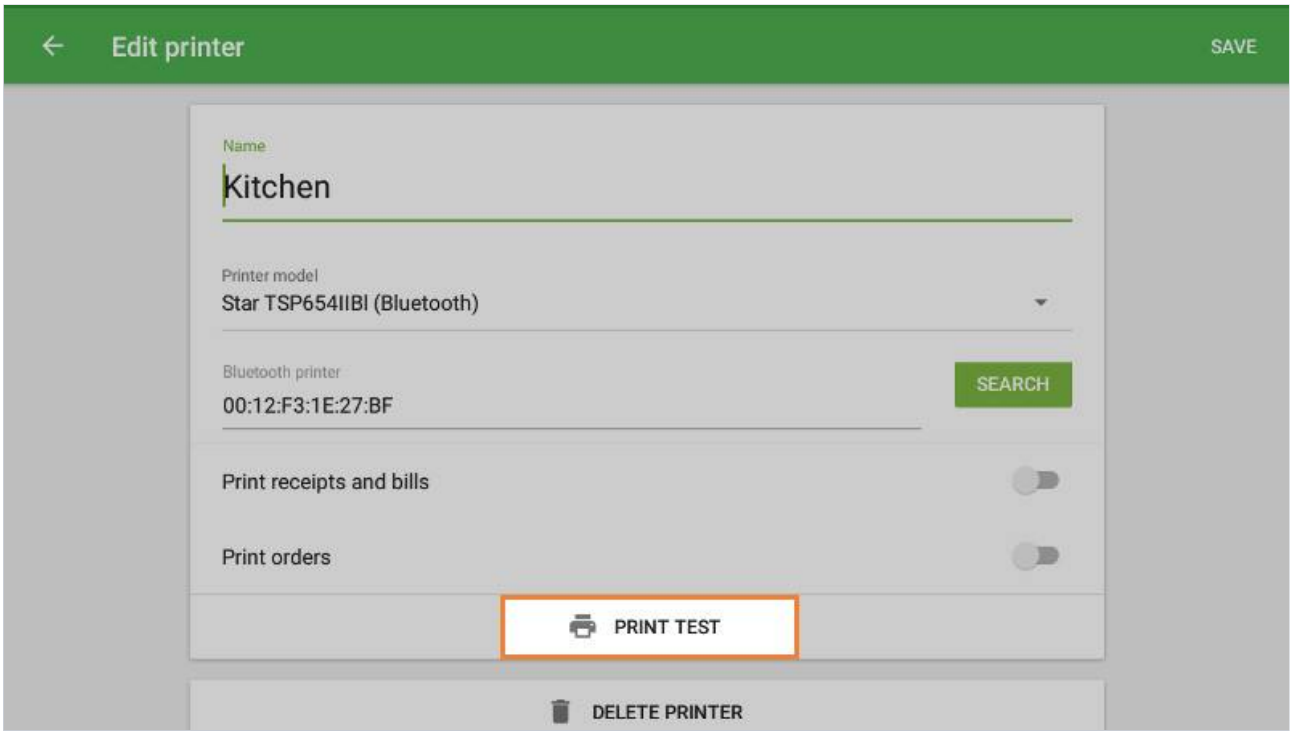
Tap the ‘Search’ button to search for your printer.



In the following pop-up window, you will see the search result with the printer model. Tap to select and close the window.



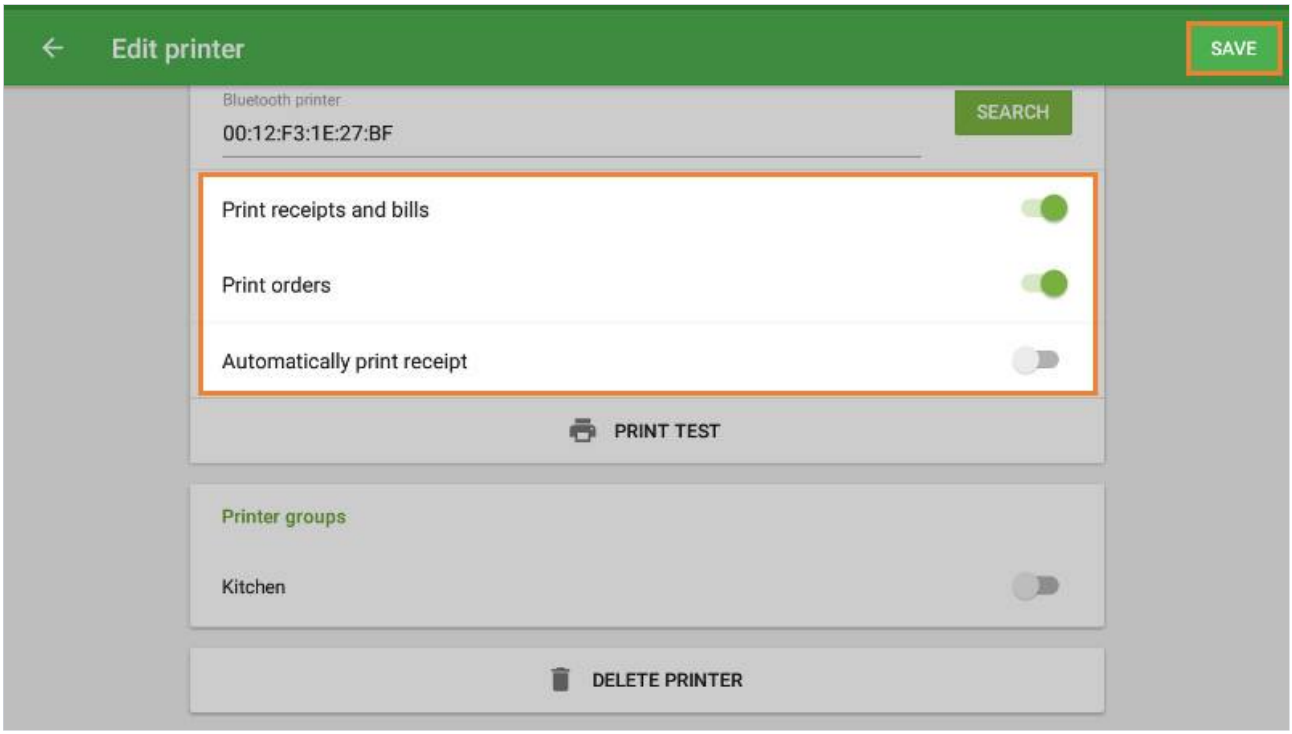
Tap the ‘Print test’ button to test your printer’s connection with the Loyverse POS app.



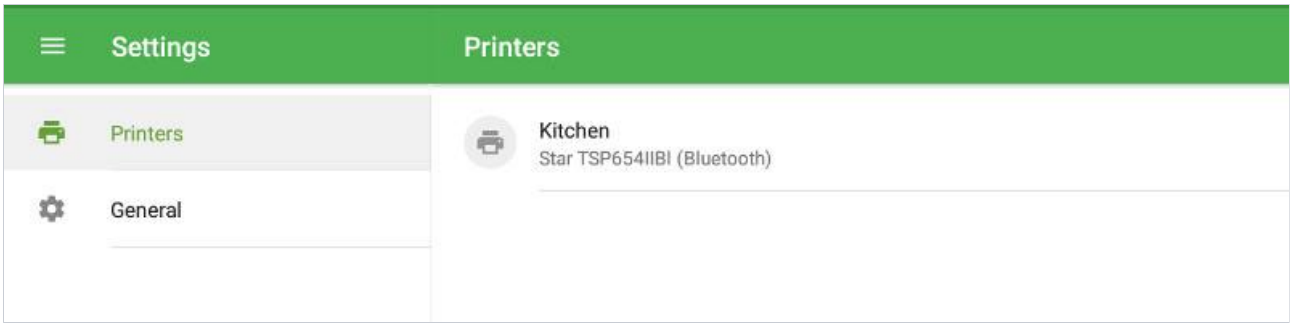
If a test receipt prints out successfully, then your printer is set up correctly.



Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the ‘Save’ button.



Now you can see your printer in the list. Nice work!



See also:

How to Set Up Other Printers in Loyverse POS

How to Set Up Other Printers in Loyverse POS on Android

Loyverse POS works with receipt printers on the Supported Printers list. However, for Android, you can try to connect to models that are not on the Supported Printers list. But be aware that not every printer may work with Loyverse POS!

These are the general requirements for a receipt printer to be compatible with Loyverse POS on Android devices:

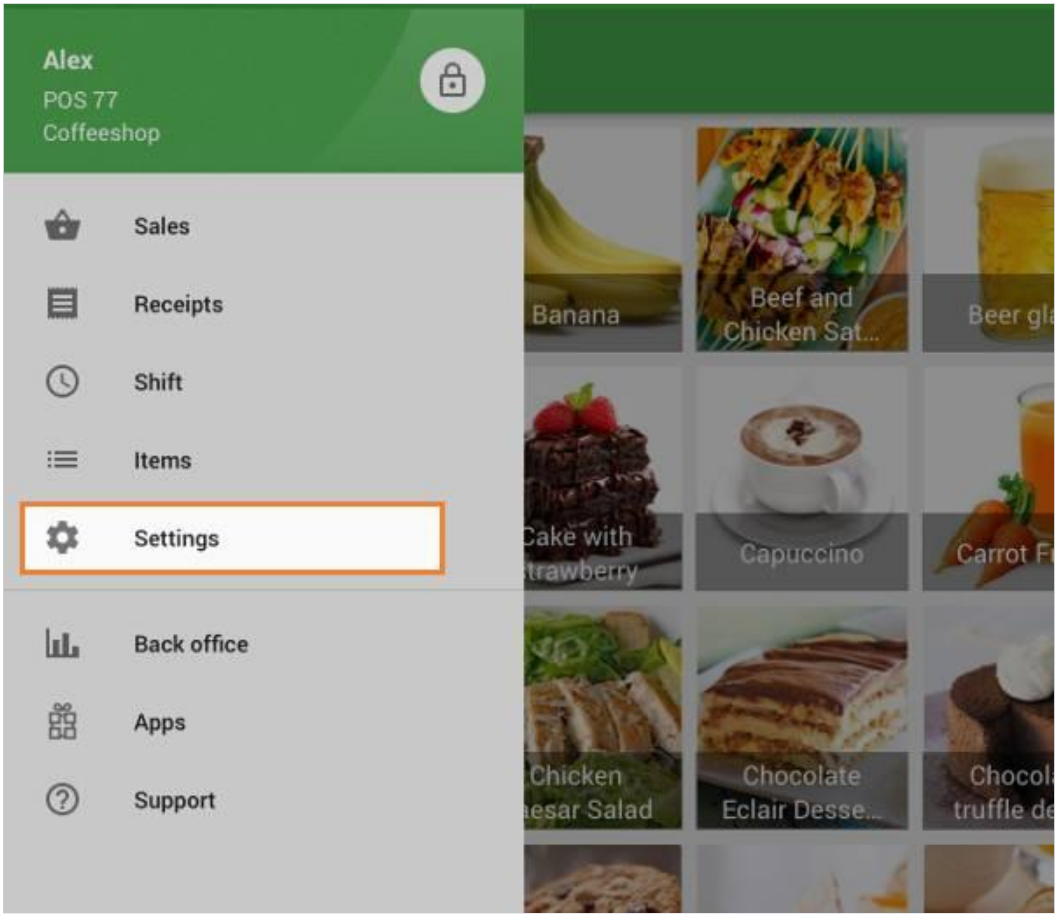
- support ESC/POS commands that are the same as Epson printers;
- have either Ethernet, WiFi, Bluetooth, or USB interface;
- support the status commands or similar functions to check that the transmitted data has been completely printed.

Consult the printer manual or the manufacturer's website to see if your receipt printer fits these requirements. If so, the printer may work with Loyverse POS; however, there might be special cases.

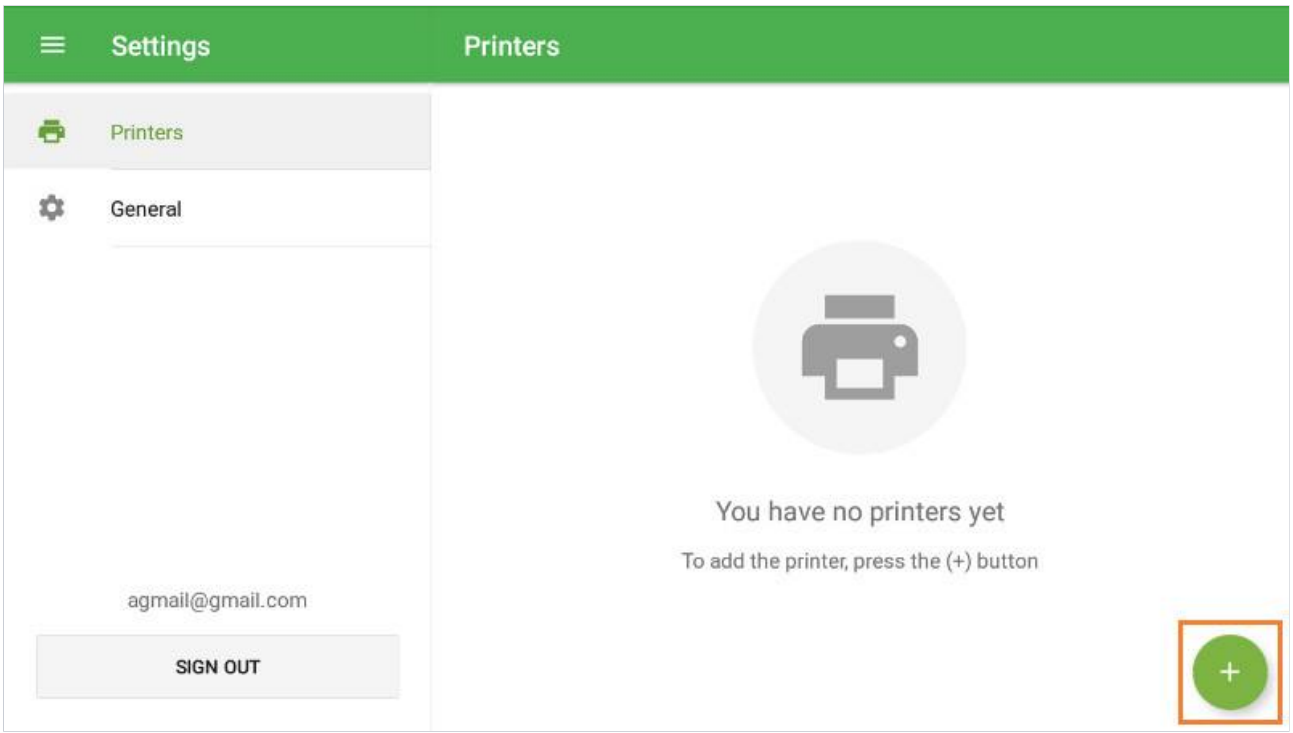
Connect or pair your printer with a mobile device

For Ethernet printer: connect your mobile device to the Wi-Fi router and connect your Ethernet printer to the router via an ethernet cable (details: How to Set Up an Ethernet Printer in Loyverse POS).
For Bluetooth printer: pair a printer with your mobile device (details: How to Set Up Bluetooth Receipt Printer with Loyverse POS).
For USB printer: connect your mobile device to the USB printer via a USB cable and OTG adapter or cable (details: How to Set Up a USB Printer with an Android Device).

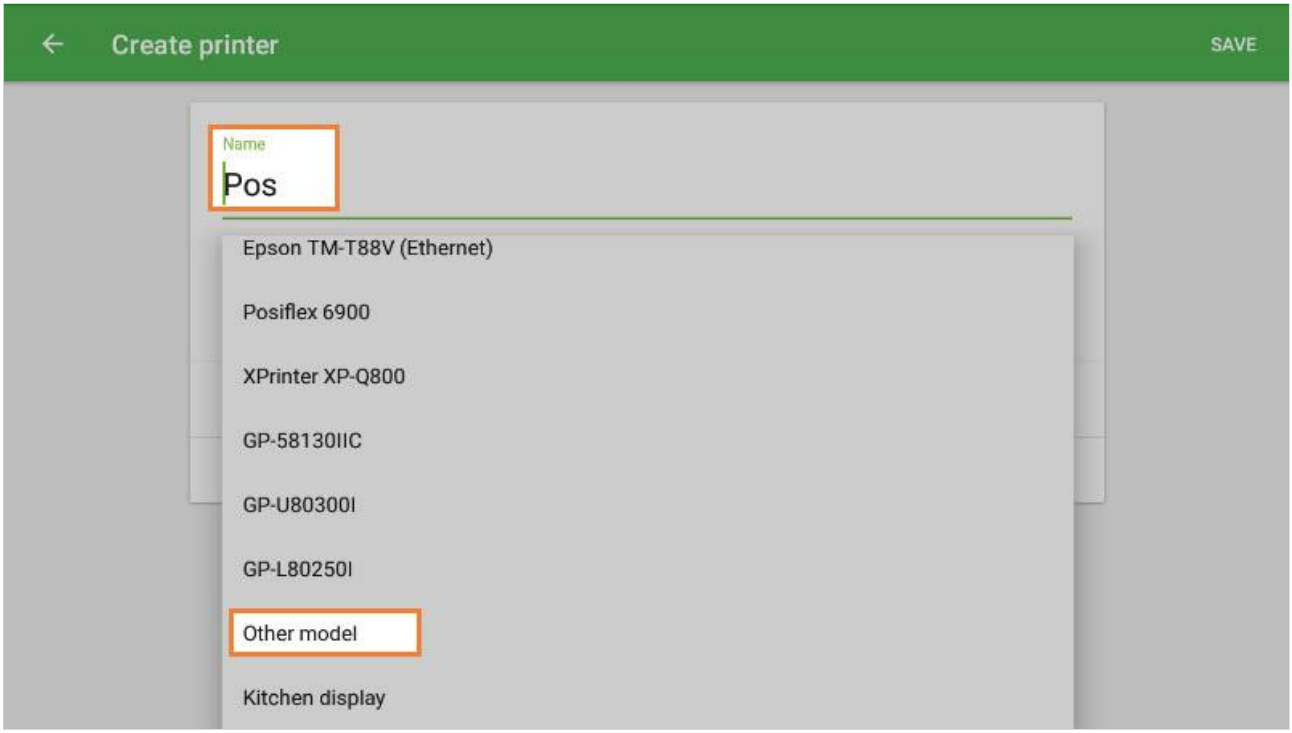
Then, in the Loyverse POS app, go to Settings.



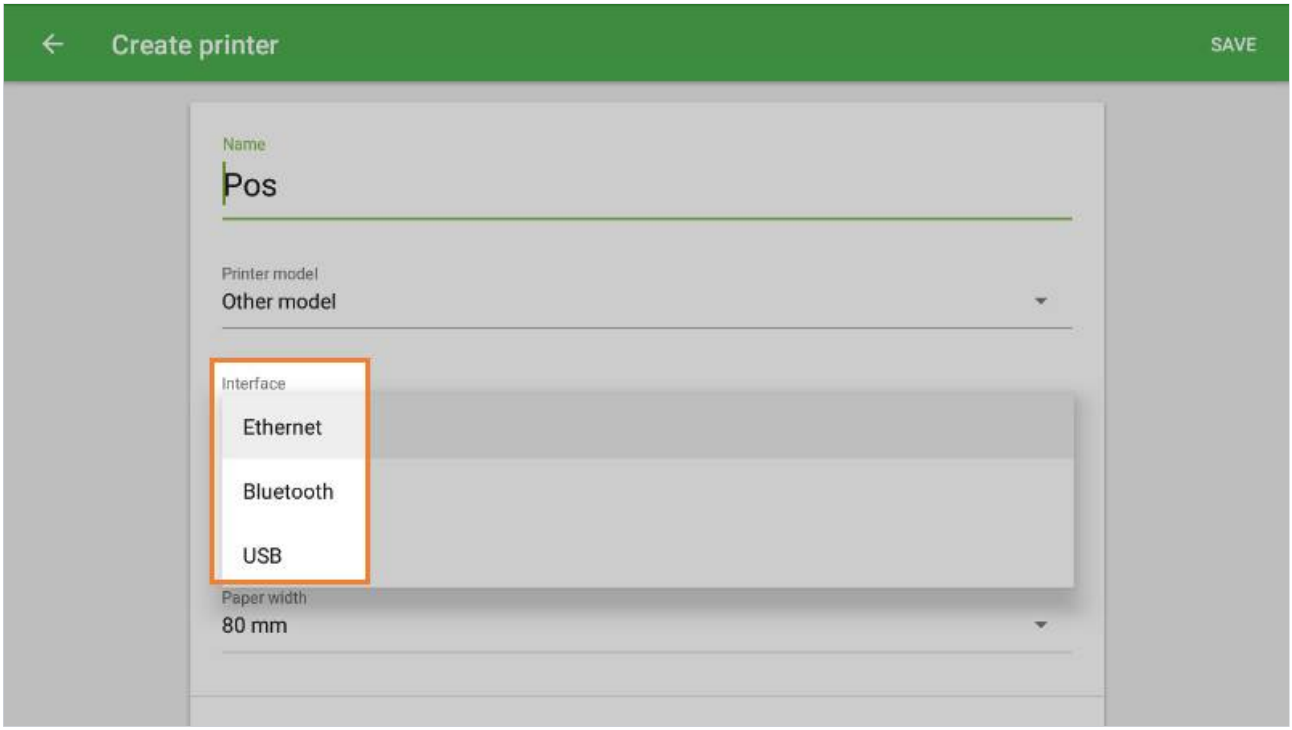
Create a printer by tapping on the '+' button.



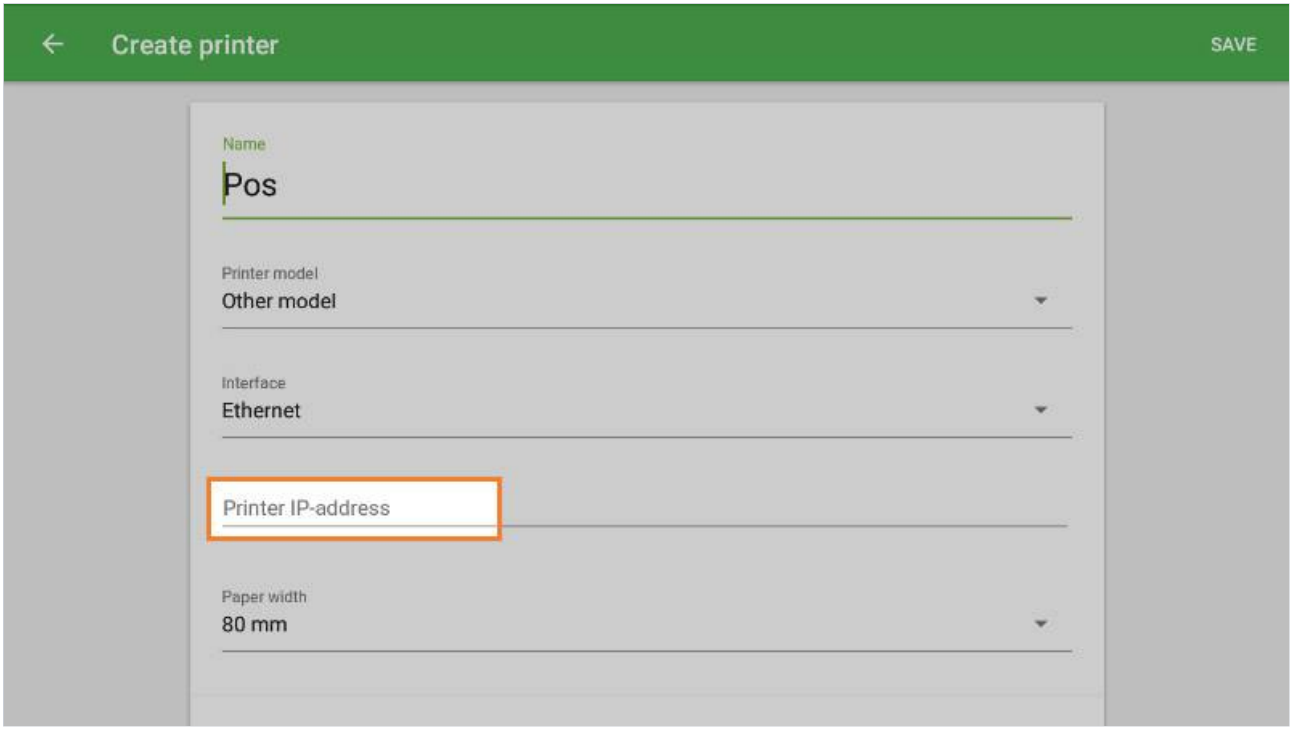
Name your printer in the 'Name' field and select 'Other model' from the drop-down list of printer models.



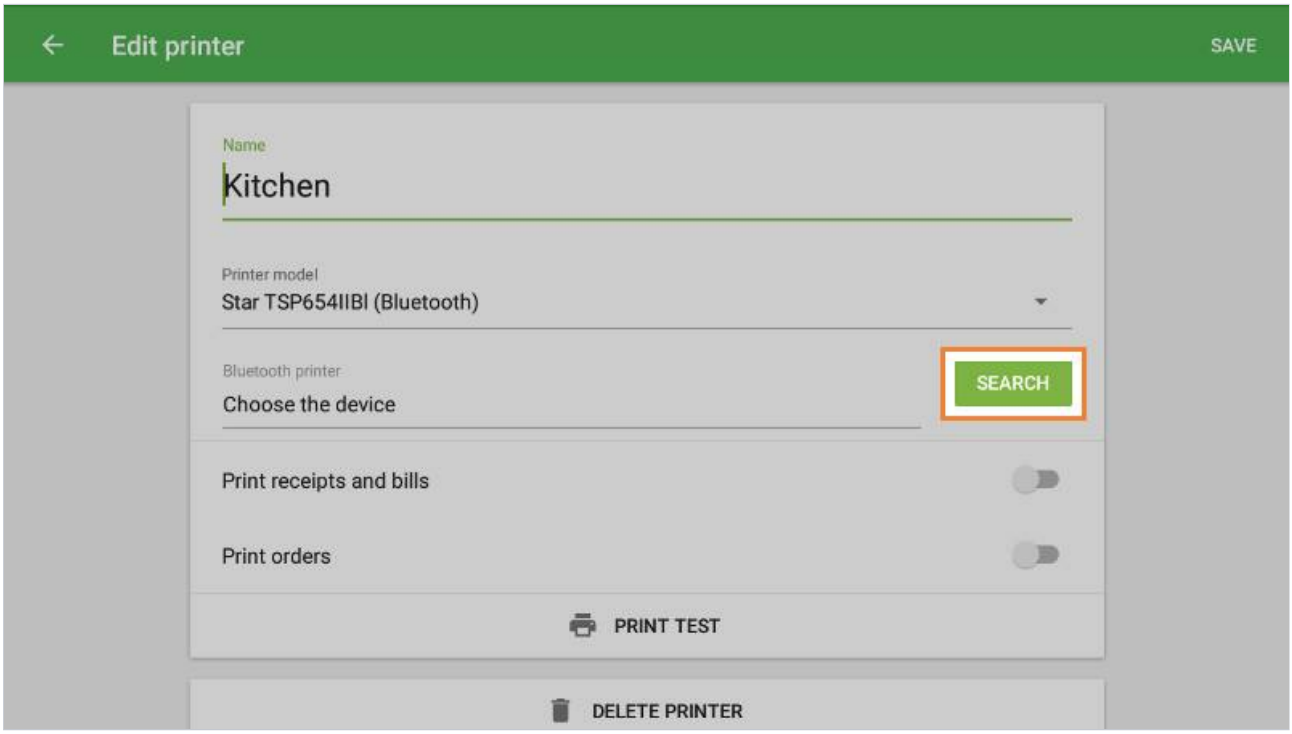
Select your printer interface in the ‘Interface’ field.



For Ethernet printer, fill in the ‘Printer IP-address’ field, which can be found in your printer's network configuration report (details: Troubleshooting When Setting Up an Ethernet Printer)



For Bluetooth printer, tap the 'Search' button to search for your printer, and select your printer in the following pop-up window.





For USB printer, select your printer from the drop-down menu. USB Printers are named in USB: VID-PID format. VID stands for Vendor ID, and PID is the Product ID.

Choose the paper width of your printer.

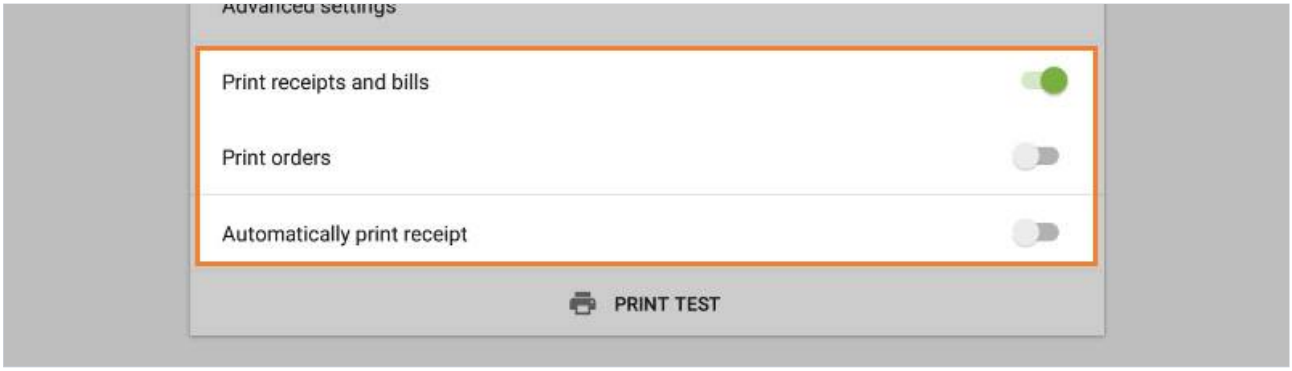
Tap the ‘Print test’ button to check your printer’s connection with the Loyverse POS app.



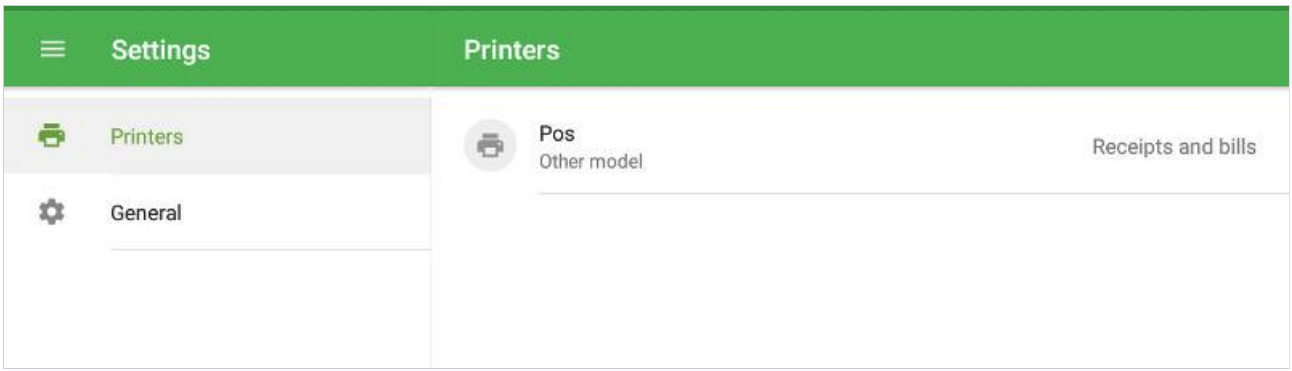
If a test receipt prints out successfully, then your printer is set up correctly.



Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the ‘Save’ button.



Now you can see your printer on the list. You are ready to start selling and printing receipts or orders.



See also:

[How to Set Up an Ethernet Printer in Loyverse POS]

How to Set Up Bluetooth Receipt Printer with Loyverse POS

How to Set Up a USB Printer with an Android Device

How to set up STAR 100 Ethernet printer to iOS

Video
https://www.youtube.com/watch?v=uVnISQYGaSg

This tutorial video describes how to set up a Star 100 ethernet printer with Loyverse POS iOS application. If you have any questions, feel free to contact us via the live chat support (https://loyverse.com/).

Troubleshooting When Setting Up an Ethernet Printer

How to Set Up Other Printers in Loyverse POS on iOS

Loyverse POS works with receipt printers on the Supported Printers list. However, for iOS devices, you can try to connect Ethernet receipt printers' models that are not on the Supported Printers list. But be aware that not every printer may work with Loyverse POS!

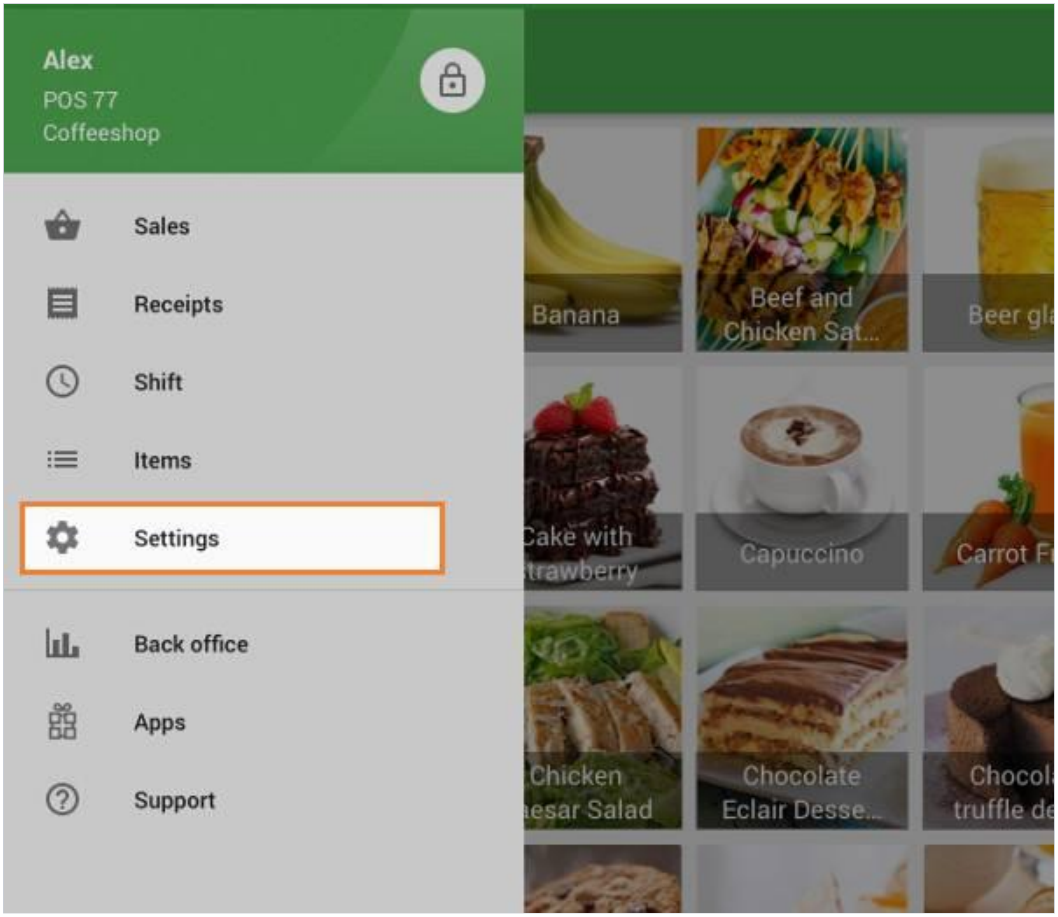
These are the general requirements for a receipt printer to be compatible with Loyverse POS on **iOS devices**:

- support ESC/POS commands that are the same as Epson printers;
- have an Ethernet interface.

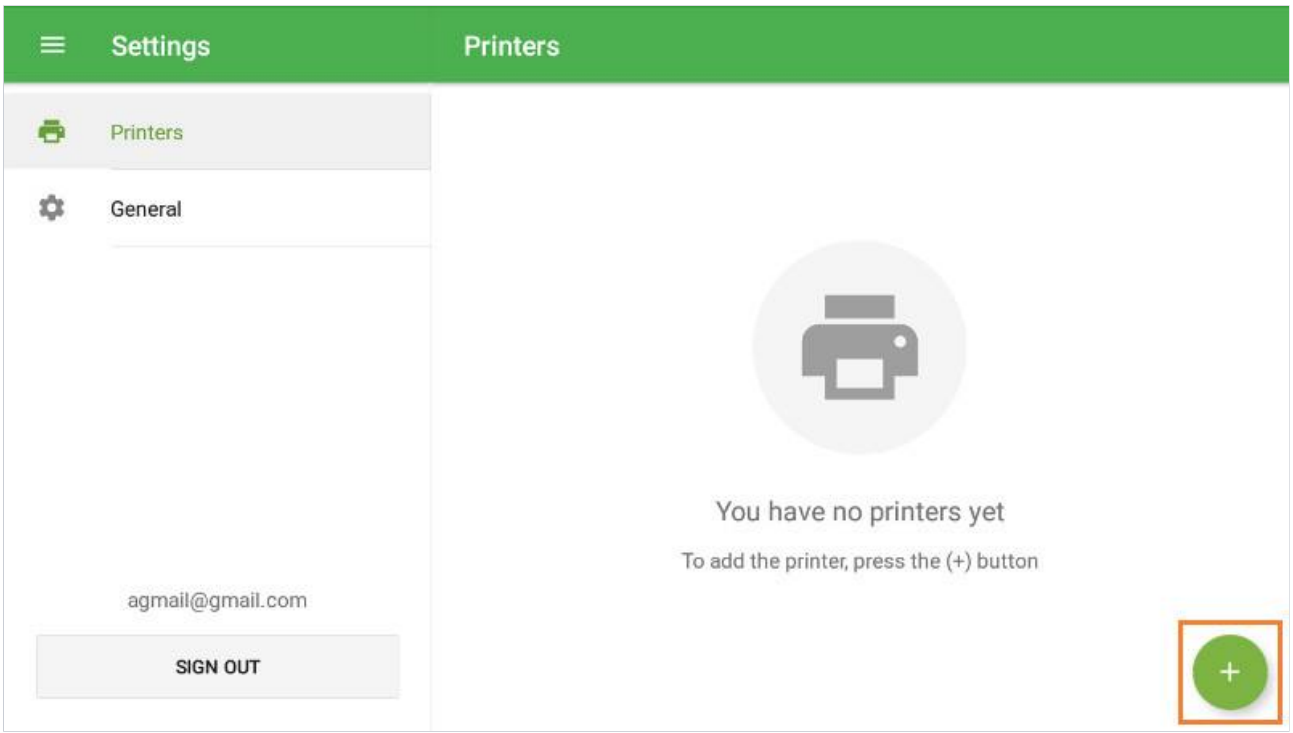
Consult the printer manual or the manufacturer's website to see if your receipt printer fits these requirements. If so, the printer may work with Loyverse POS; however, there might be special cases.

Connect your mobile device to the Wi-Fi router and connect your Ethernet printer to the router via an Ethernet cable (details: How to Set Up an Ethernet Printer in Loyverse POS).

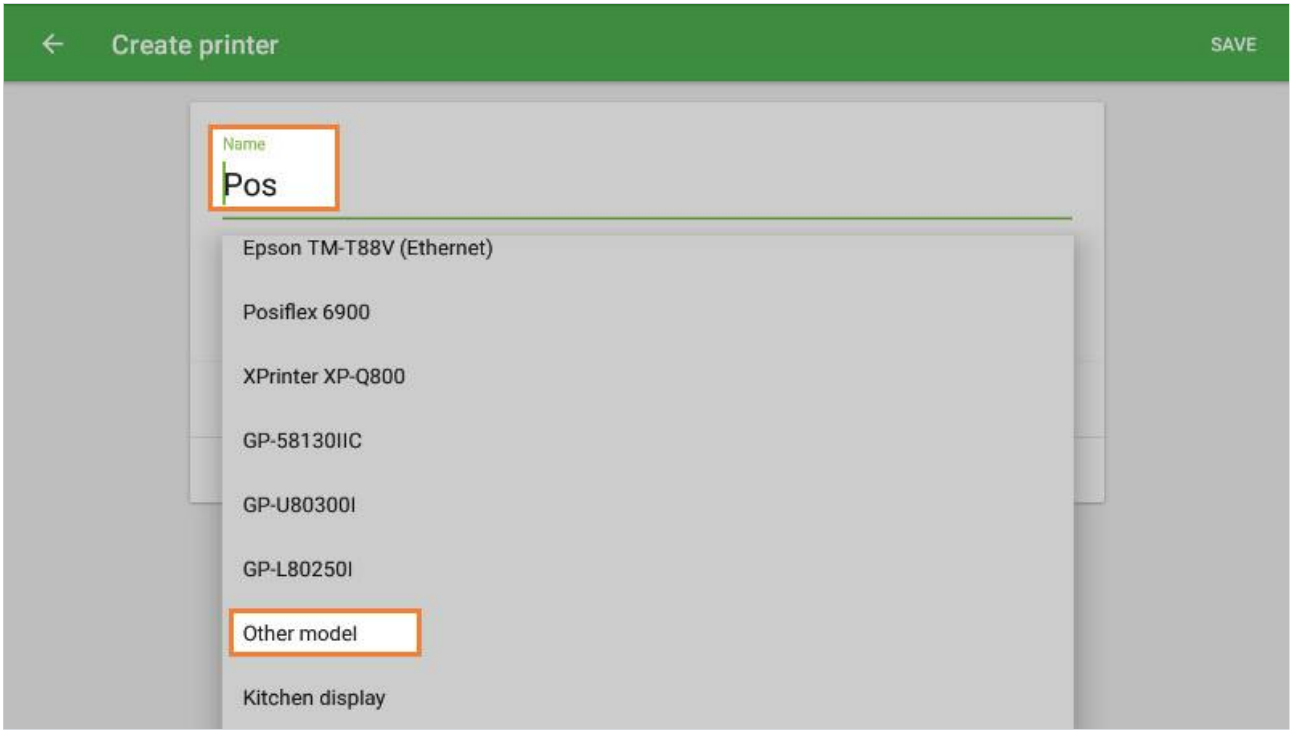
Then, in the Loyverse POS app, go to Settings.



Create a printer by tapping on the '+' button.



Name your printer in the 'Name' field and select 'Other model' from the drop-down list of printer models.



Fill in the ‘Printer IP-address’ field, which can be found in your printer's network configuration report (details: Troubleshooting When Setting Up an Ethernet Printer)



Choose the paper width of your printer.

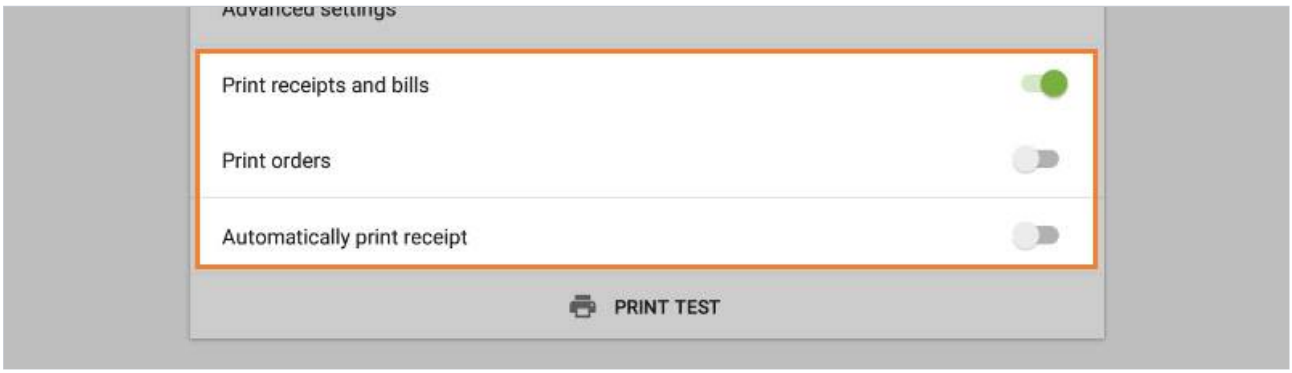
Tap the ‘Print test’ button to check your printer’s connection with the Loyverse POS app.



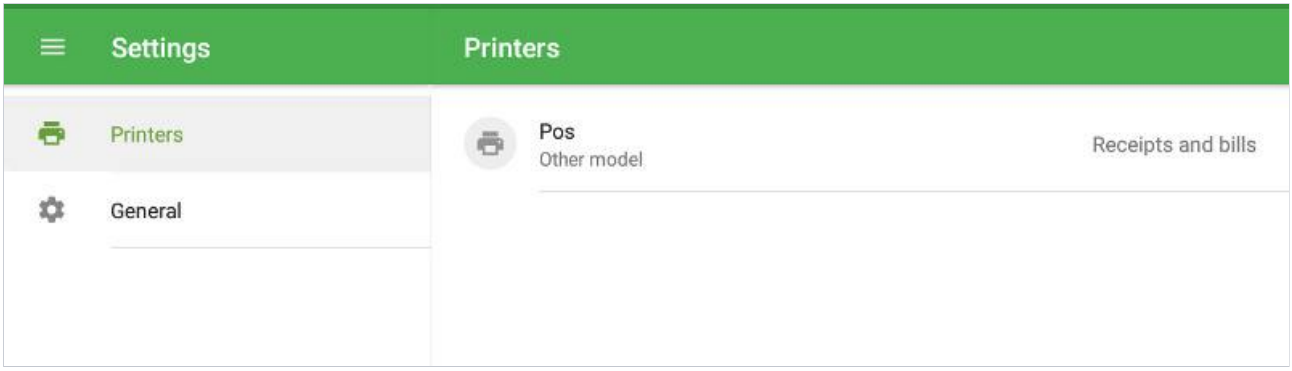
If a test receipt prints out successfully, then your printer is set up correctly.



Choose the settings for your printer depending on how you want to use it. Don't forget to save all settings at the end by tapping the ‘Save’ button.



Now you can see your printer on the list. You are ready to start selling and printing receipts or orders.



See also:

[How to Set Up an Ethernet Printer in Loyverse POS]

[How to Set Up Bluetooth Receipt Printer with Loyverse POS]

[How to Set Up Other Printers in Loyverse POS on Android]

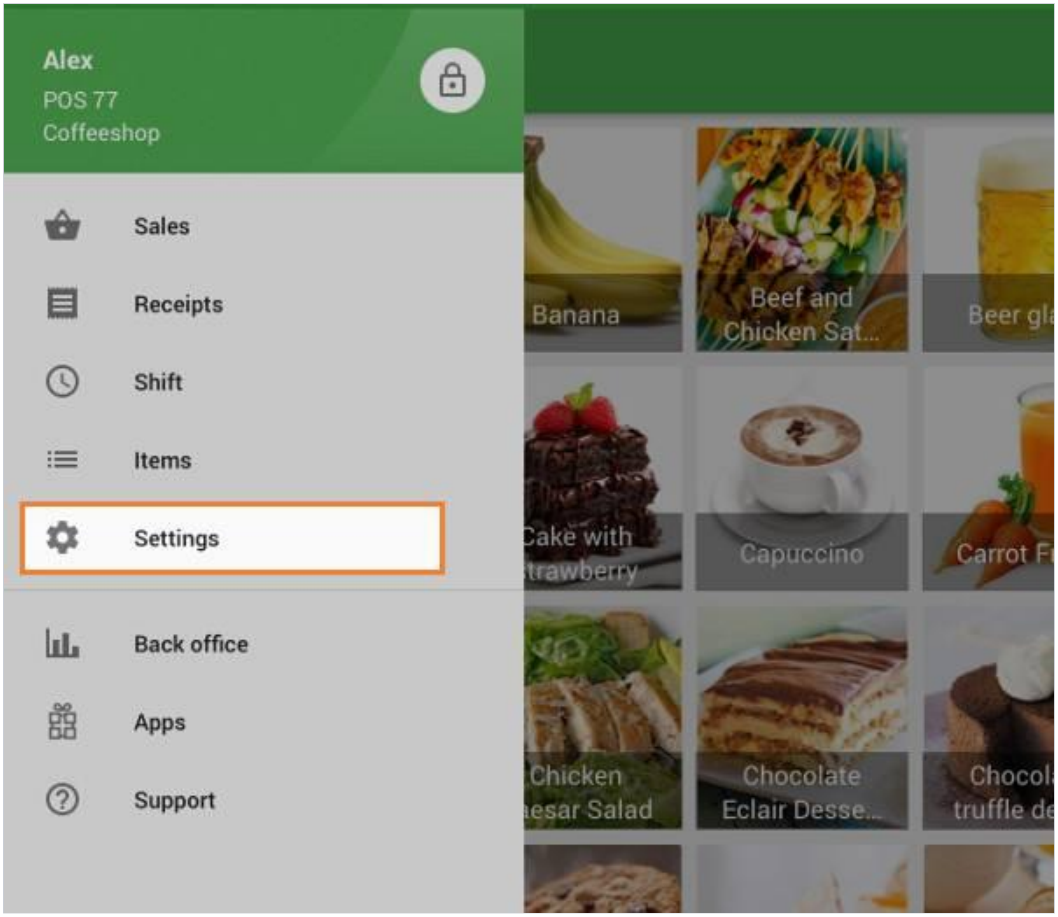
Connecting Built-in Printers on Sunmi Devices

Video
https://www.youtube.com/watch?v=NqwquZ94Tx4

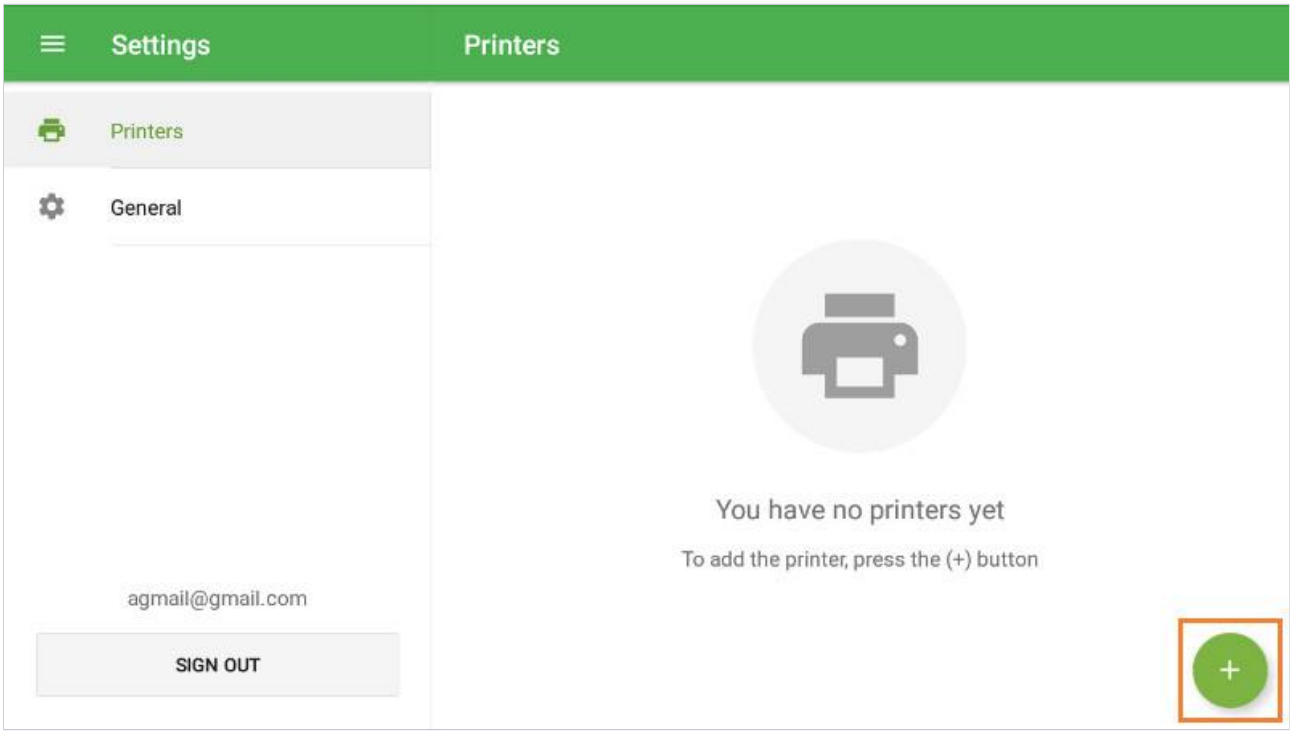
Loyverse POS app for Android is compatible with built-in printers on Sunmi devices.

The list of supported Sunmi devices:
Sunmi V1
Sunmi V1S
Sunmi V2
Sunmi V2 pro
Sunmi T1 mini
Sunmi T2 mini
Sunmi D2 mini
Sunmi T2 (**Note:** The second screen on this device will not work as the customer display (CDS).)
Sunmi S2 (**Note:** The second screen on this device will not work as the customer display (CDS). The Scale of this device also does not work with Loyverse POS to weigh items.)
Sunmi M2

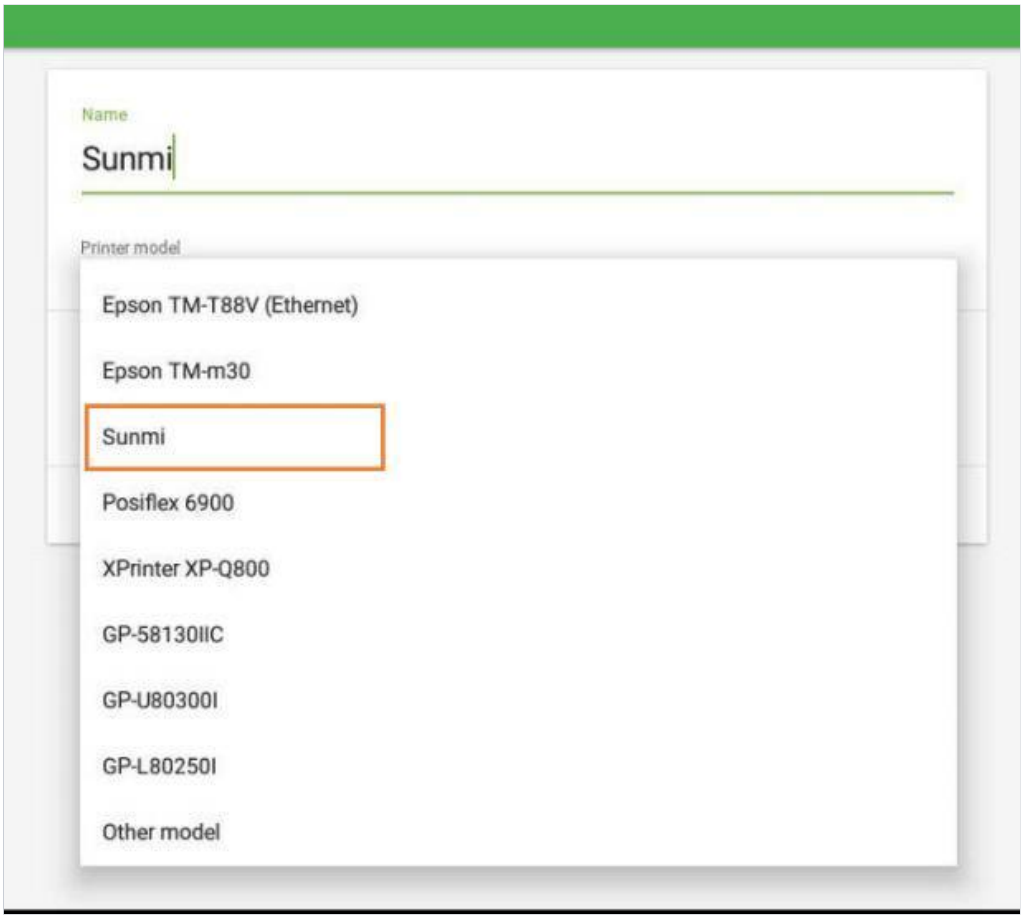
To connect the internal printer on SUNMI device, start the Loyverse POS app and go to Settings.



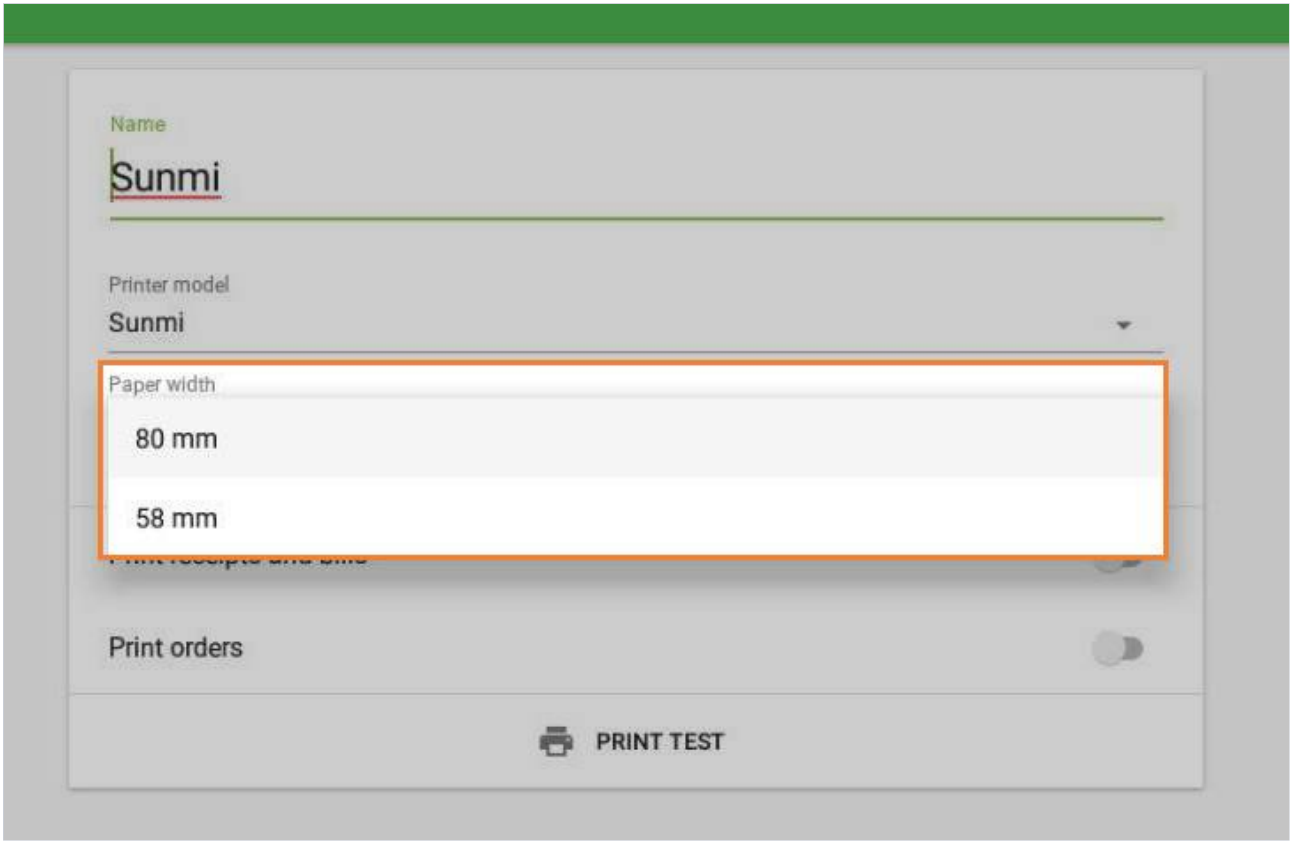
Create a printer by tapping on the '+' button.



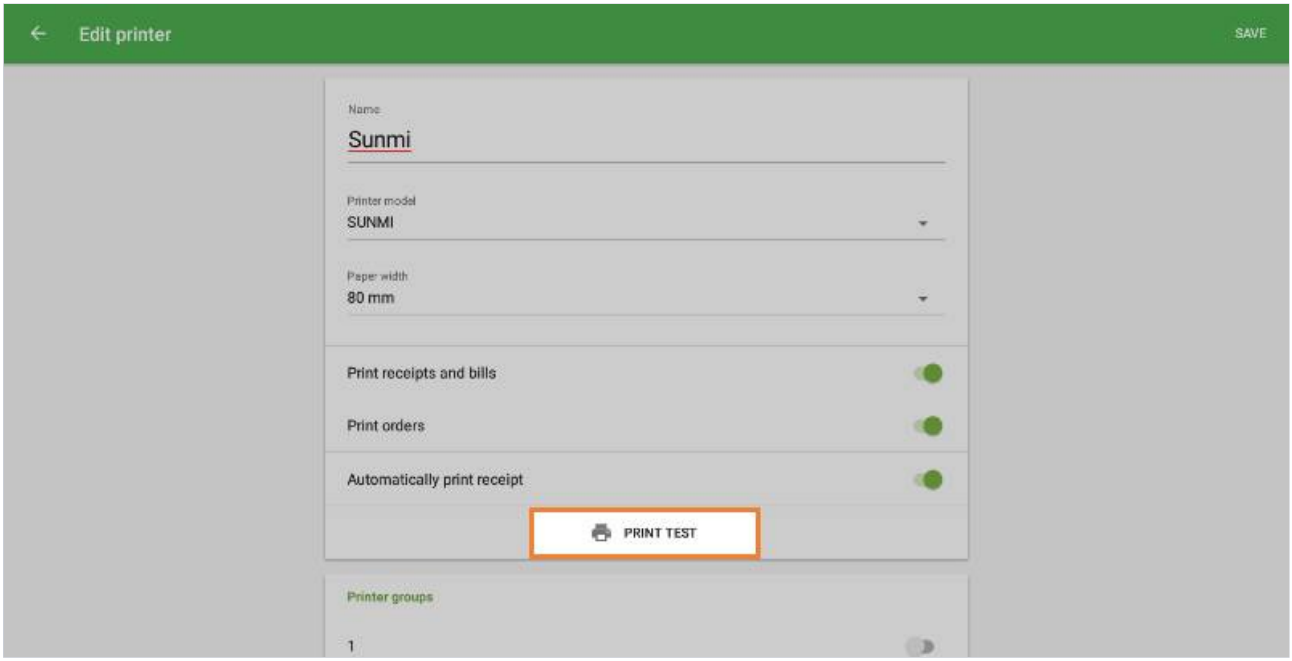
Type the title of your printer in the ‘Name’ field and select SUNMI from the drop-down menu of printer models.



Select ‘Paper width’ of the printer.



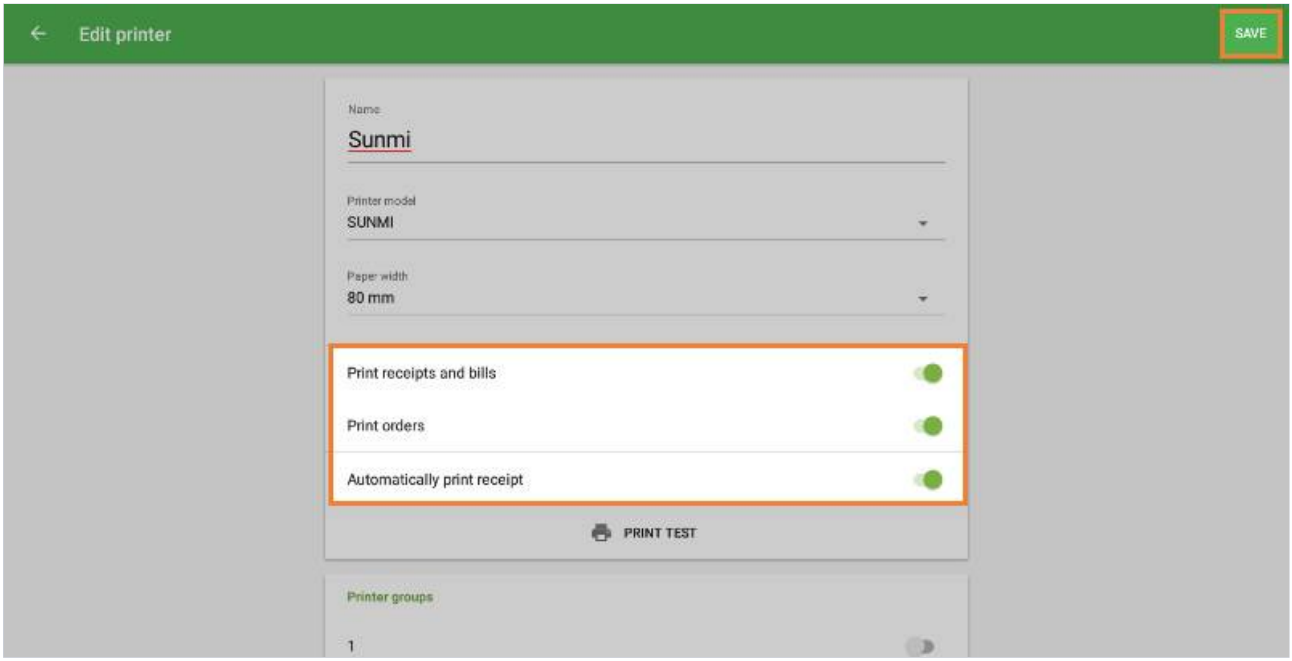
Tap the ‘Print test’ button to test your printer’s connection with the Loyverse POS app.



If a test receipt prints out successfully, then your printer is set up correctly.



Choose the settings for your printer, depending on how you want to use it. Don't forget to save all of the settings at the end, by tapping on the ‘Save’ button.



Now you can see your printer in the list.



Note: It is impossible to connect and print receipts from other mobile devices at the built-in printer of Sunmi device.

See also:

Top 5 Popular Sunmi Devices among Loyverse POS Users

Troubleshooting When Setting Up an Ethernet Printer

When you cannot set up an Ethernet printer with Loyverse POS (Play Market or App Store), it's a good possibility that either the printer is experiencing a hardware issue, or you have a network-related issue. We always recommend testing the printer for hardware issues before testing the network.

Testing hardware issues

Check that the paper is loaded and that there are no paper jams.

Check the cable connections; both power and ethernet cables going from the printer and Wi-Fi router.

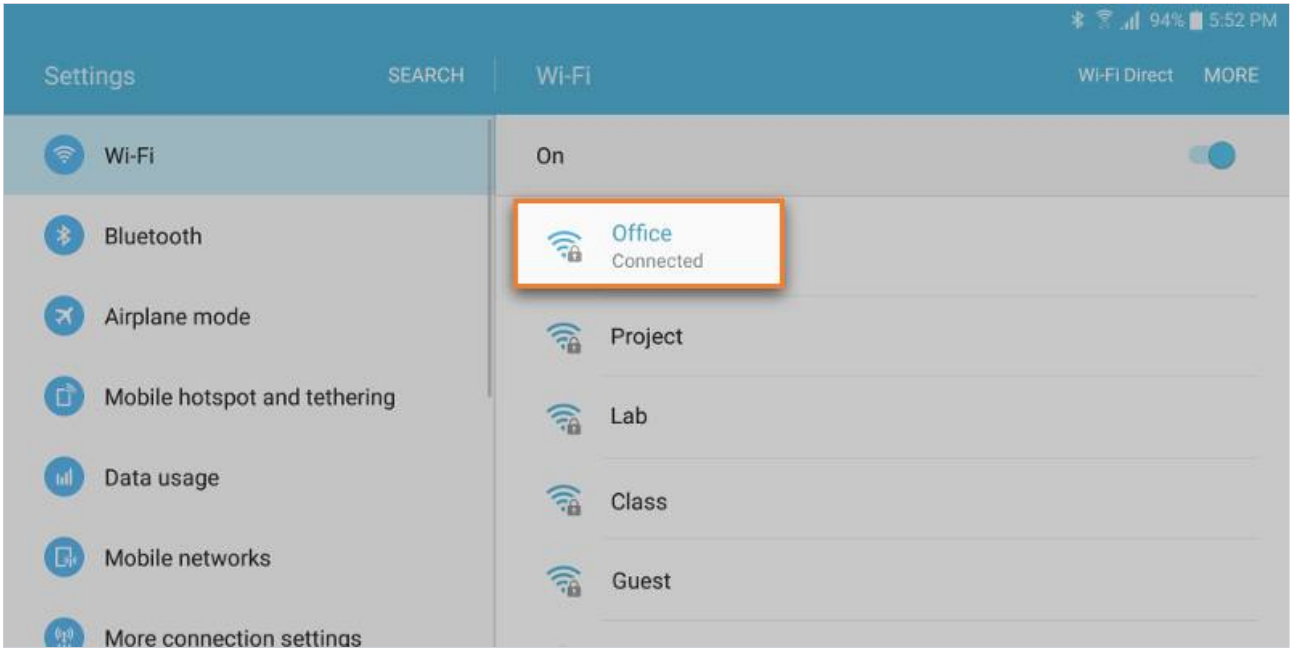
Ensure that the printer and router power indication lights are on.

Verify that the printer has no flashing lights or Red lights since this usually occurs with malfunctions.

Network related issues

1) Check if your mobile device is connected to the Wi-Fi network provided by the Wi-Fi router, and plugged into the receipt printer.

In the settings on your mobile device check the network you are connected to.



If not connected to your Wi-Fi router, choose your Wi-Fi network to connect to it.

2) Next, verify that the receipt printer and the router are on the same subnet.

On your receipt printer, you need to print a network configuration report by following these steps:

- Turn the printer's power switch off
- Hold down the FEED button located on the front of the printer
- While continuing to hold the FEED button down, turn the power switch on
- The lights should flash for a few seconds, and then one or two pages should print out with a configuration report
- You can now release the FEED button

You can find the IP address of your printer under the "Current IP Parameters Status" section (underlined in orange below).

1. IP address of receipt printer

Then, you have to check the IP address of your router network. It is possible to do this on your mobile device, connected to your router's Wi-Fi.

On **Android mobile devices**, go to Settings, and in the 'About device' menu, tap Status and check the IP address line.

2. IP address of your router

On **Apple mobile devices** go to Settings and just tap your active Wi-Fi connection.

3. IP address of your router

Compare the two IP addresses: receipt printer 1 and router 2 or 3.

Both of the first three groups of numbers should be the same. If they are not, that means the two devices are on a different subnet.

You have to change the IP address either at the receipt printer or at your router. For how to do it, refer to user manuals of these devices or contact your network administrator.

The 4th group of numbers has to be different.

Note: Loyverse POS communicates with an Ethernet receipt printer via port 9100. If your printer has been set to another port, change the printer settings to port 9100. Refer to user manuals of a printer for information on how to do this.

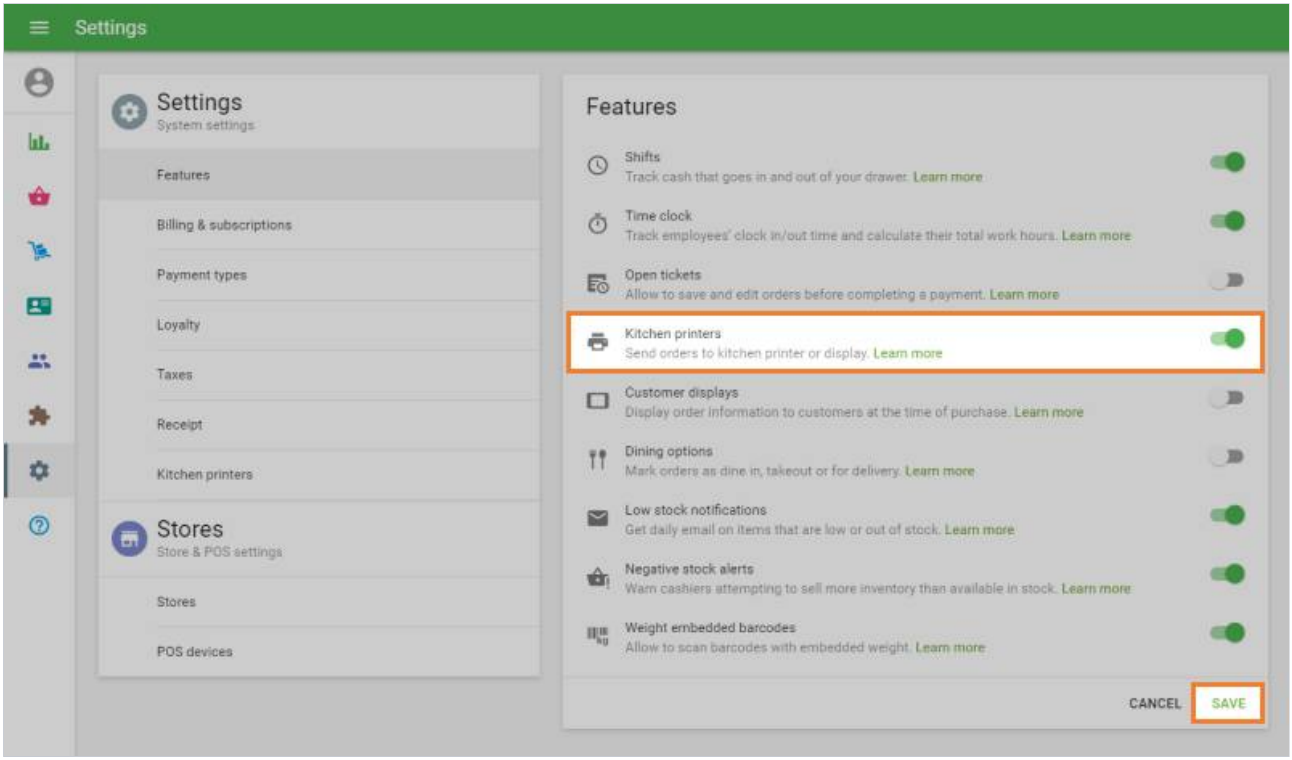
Using Kitchen Printers with Loyverse POS

Video
https://www.youtube.com/watch?v=k-5rbBbhyTw

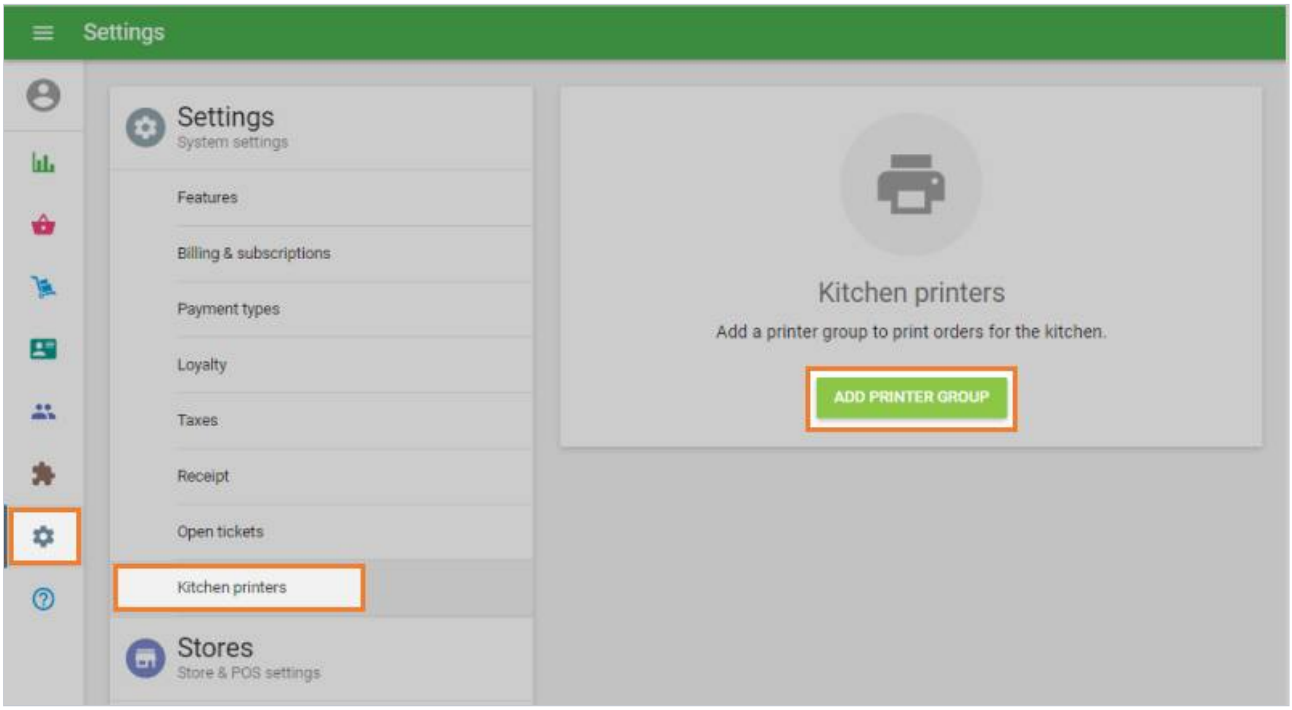
Cafes and restaurants use kitchen printers to inform the cooking staff what to prepare from an order.

1. Configuring Loyverse Back Office

Log in to the Back Office, navigate to the Settings menu, Features section, and switch on the 'Kitchen Printers' slider.

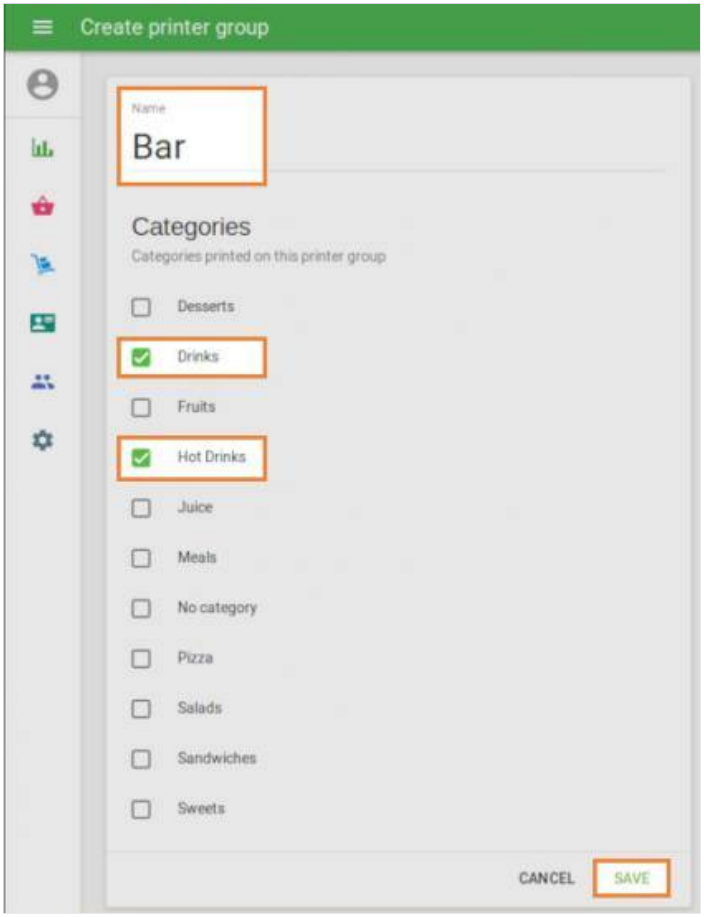


Click the Kitchen Printers menu and create a printer group.



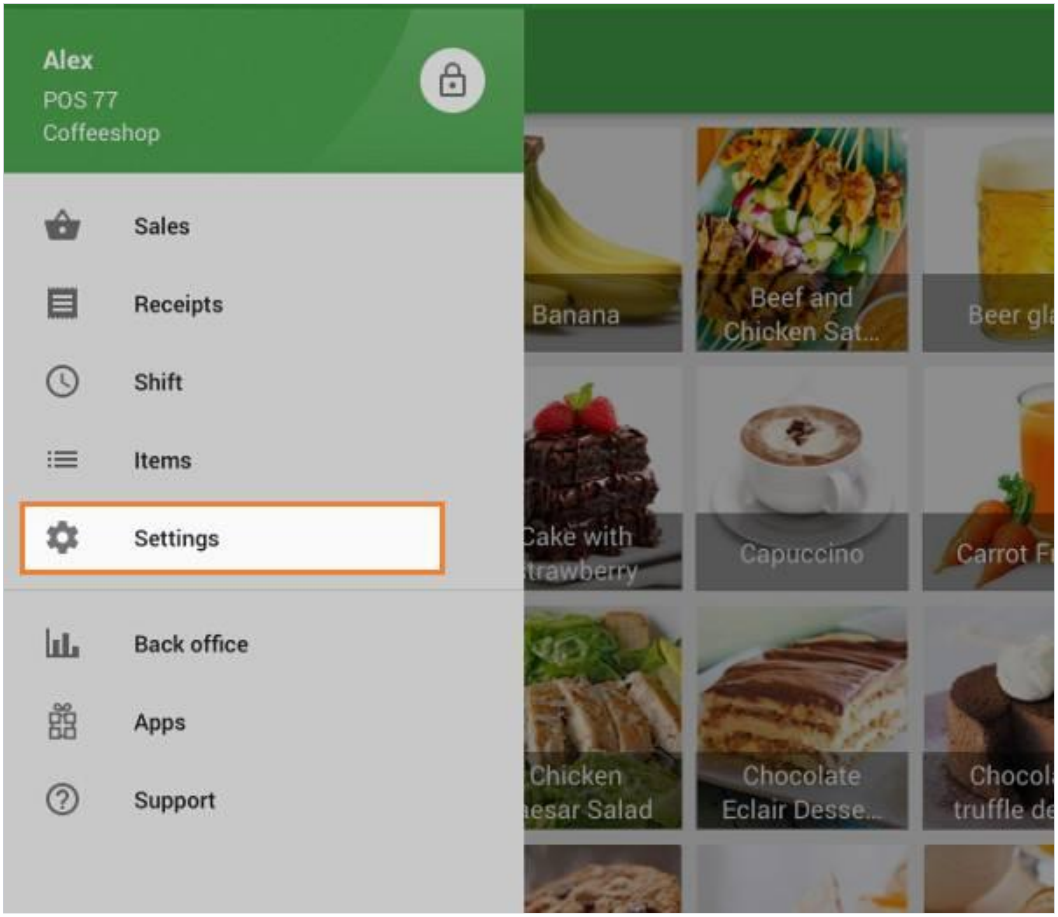
Give the printer group a meaningful name. A printer group typically corresponds to the printer location - bar, kitchen, kitchen station, etc. Therefore, the recommended practice is to use the printer location as the printer group name.

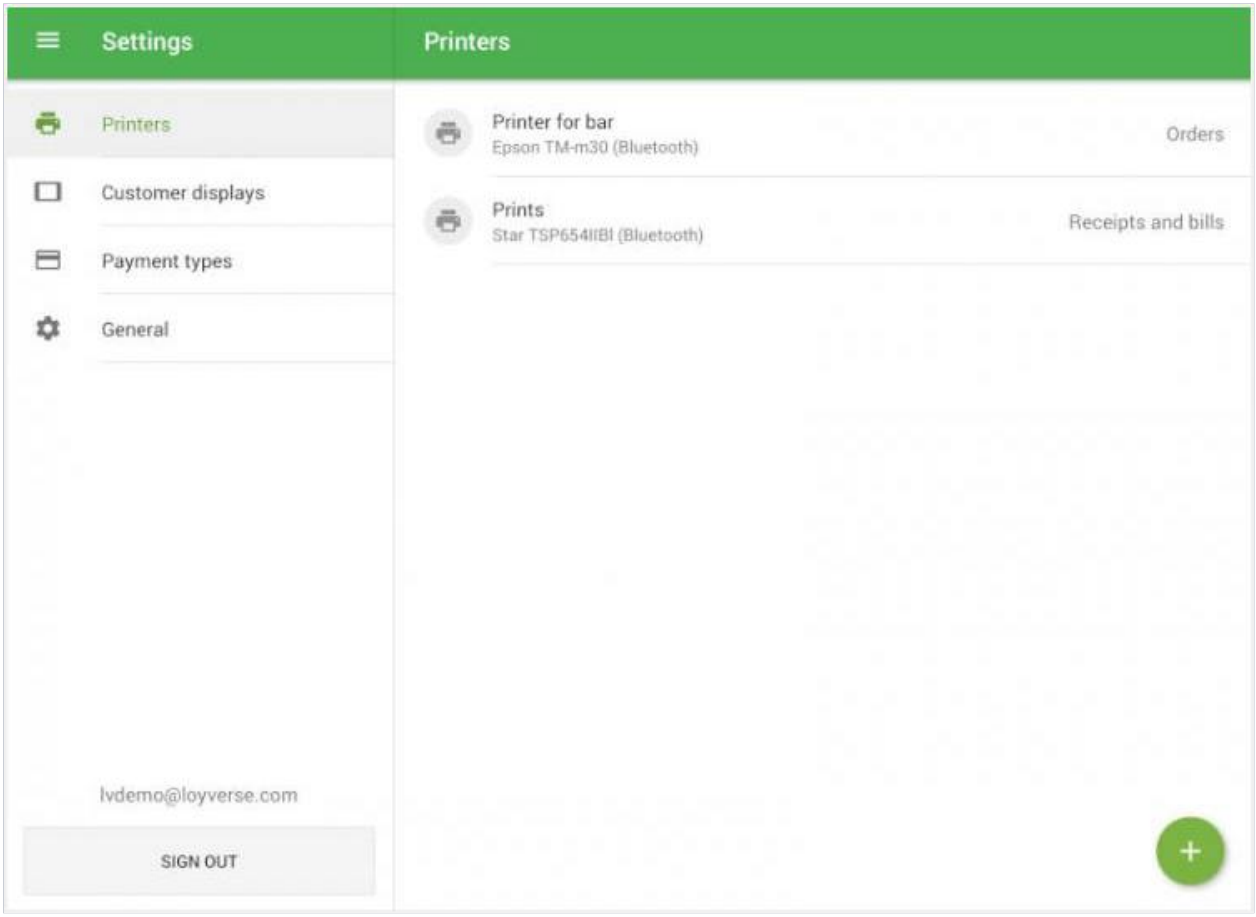
Tick item categories that should be included in this printer group and save your selection.



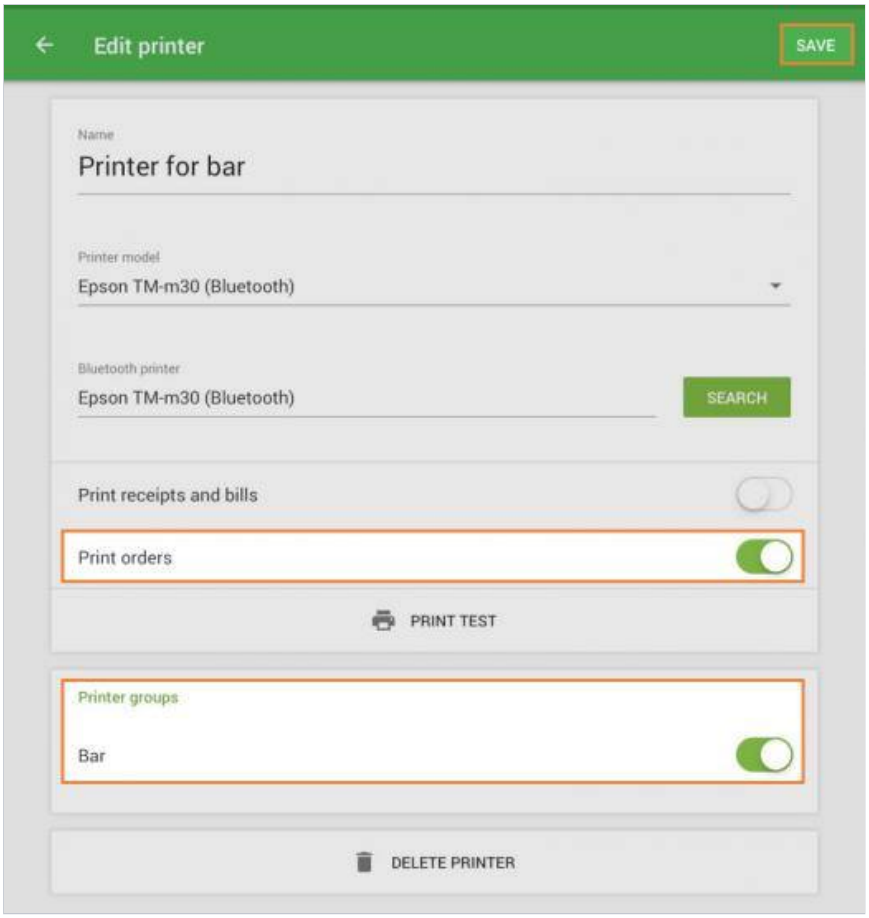
2. Setting Up the Loyverse POS App

Using the Loyverse POS app (Play Market or App Store), assign an actual printer to a certain printer group.
Open the Settings menu and select the printer you will use to print the orders for the kitchen or add a new one. (How to set up Star ethernet printer in Loyverse POS)

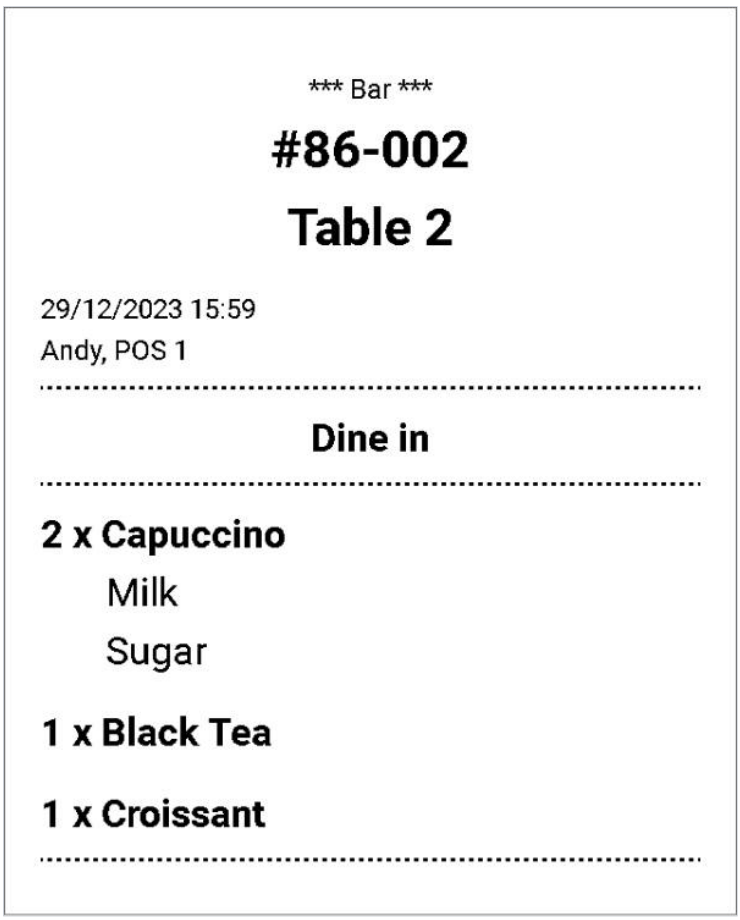

Alex
POS 77
Coffeeshop
Sales
Receipts
Shift
Items
Settings
Back office
Apps
Support
Banana
Beef and Chicken Sat...
Cake with
Capuccino
Chicken
Chocolate Eclair Desse...


Settings
Printers
Printers
Customer displays
Payment types
General
Printer for bar
Epson TM-m30 (Bluetooth)
Orders
Prints
Star TSP654IIBI (Bluetooth)
Receipts and bills
lvdemo@loyverse.com
SIGN OUT

Specify that this printer will print orders. Switch on “Print orders”, select the proper printer group, and save your settings.

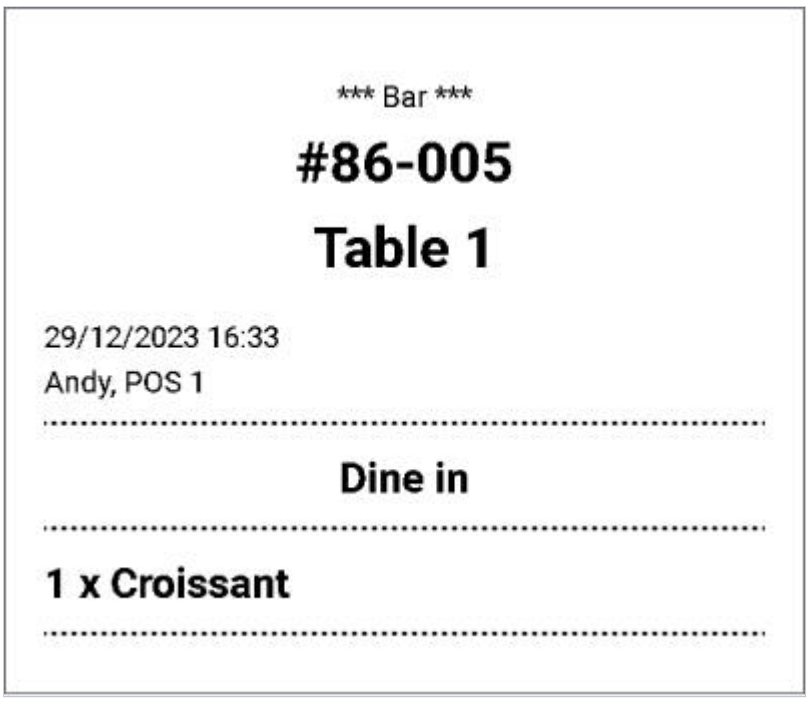


Now, when a customer orders, the kitchen printer automatically produces a ticket with the list of items to prepare. If you use open tickets, the kitchen ticket will print as soon as you save the open ticket.

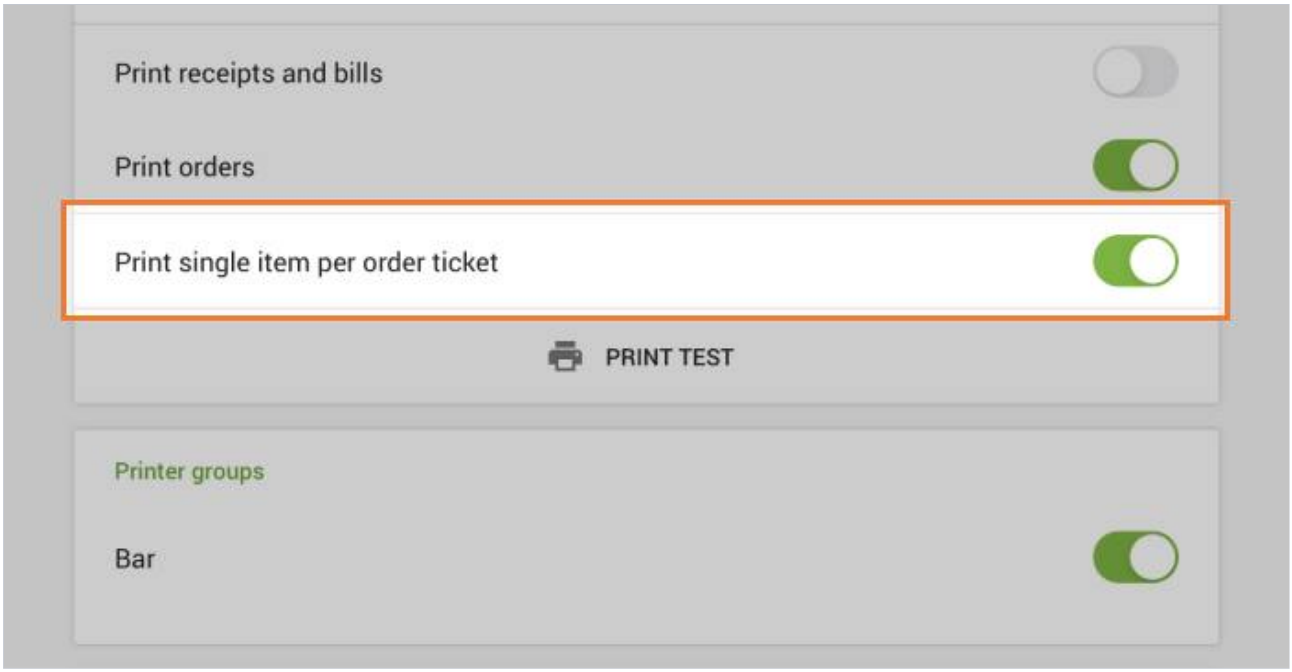


If you correct an open ticket by deleting or adding an item, the kitchen printer will print a corresponding ticket.

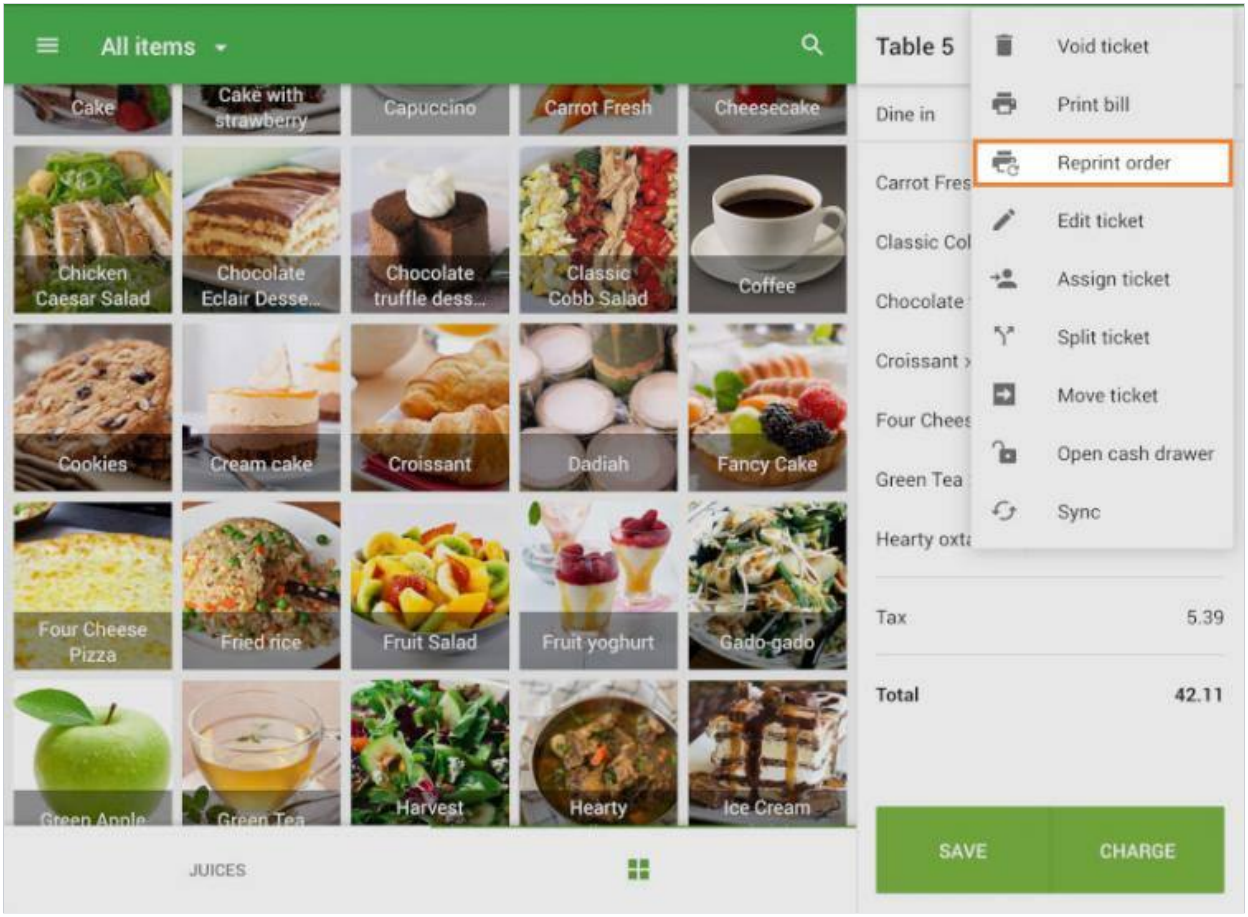




Sometimes, it is convenient to print each item in the order separately instead of having the whole order printed at once. To do that turn the toggle “Print single item per order ticket” on, and then each item in the order will be printed as a separate ticket.



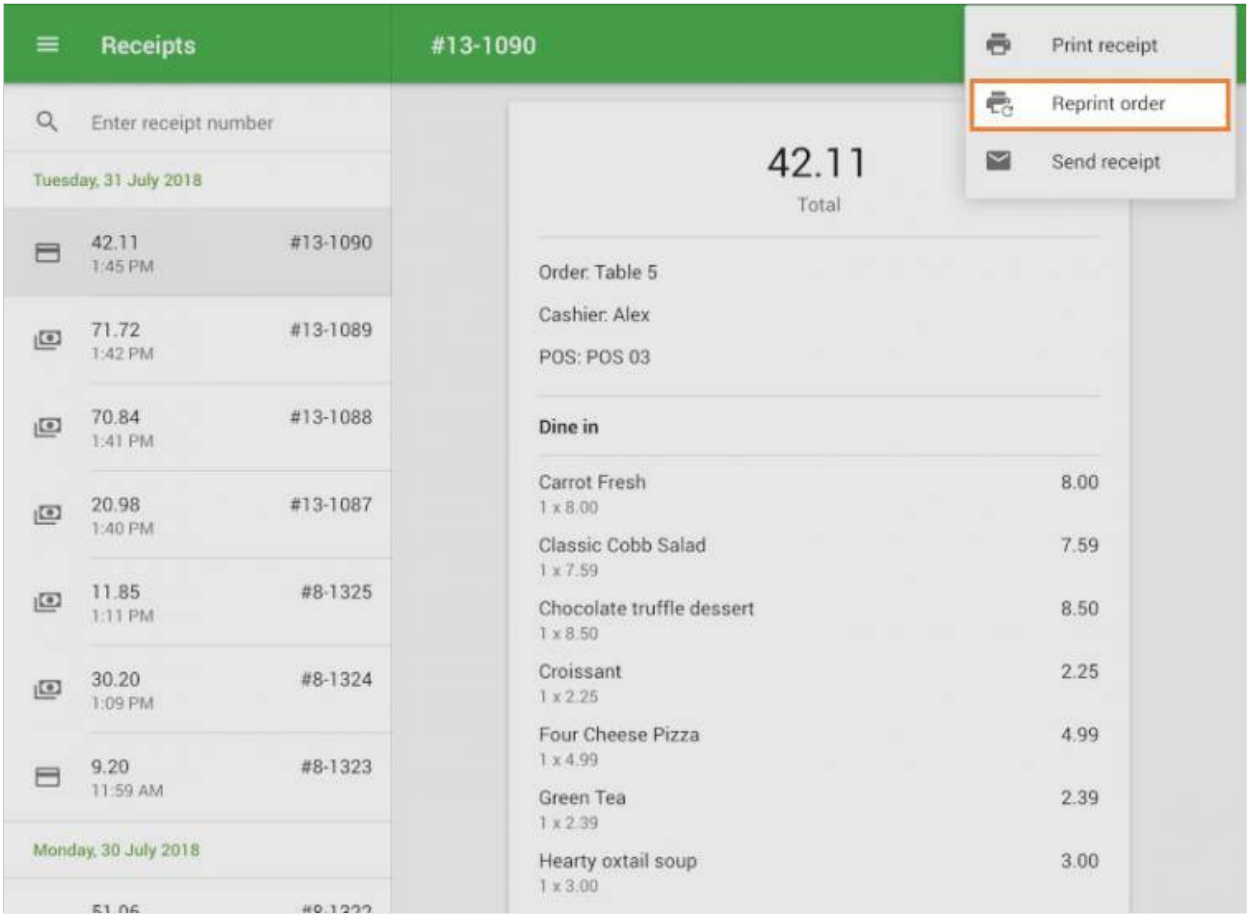
You can reprint the kitchen orders. To do this, open the saved ticket and tap ‘Reprint order’ from the three dots menu.



The kitchen printer will reprint the ticket with the mark ‘Reprint’.



You can reprint the kitchen orders for 2 hours after closing the open ticket from the Receipts section.



See also:

How to Set Up Kitchen Printer for Each Kitchen Station

How to Set Up Multiple Kitchen Stations to Share one Printer

How to Set Up an Ethernet Printer in Loyverse POS

Kitchen Display System Configuration Guide

How to Use Loyverse KDS Kitchen Display

Troubleshooting When Working with KDS

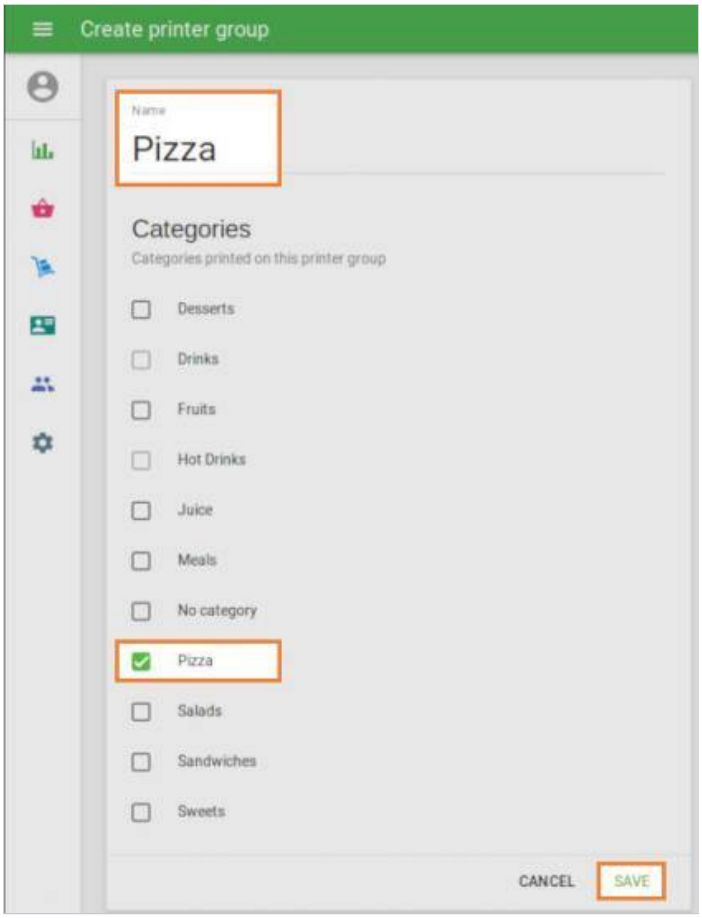
Open Tickets

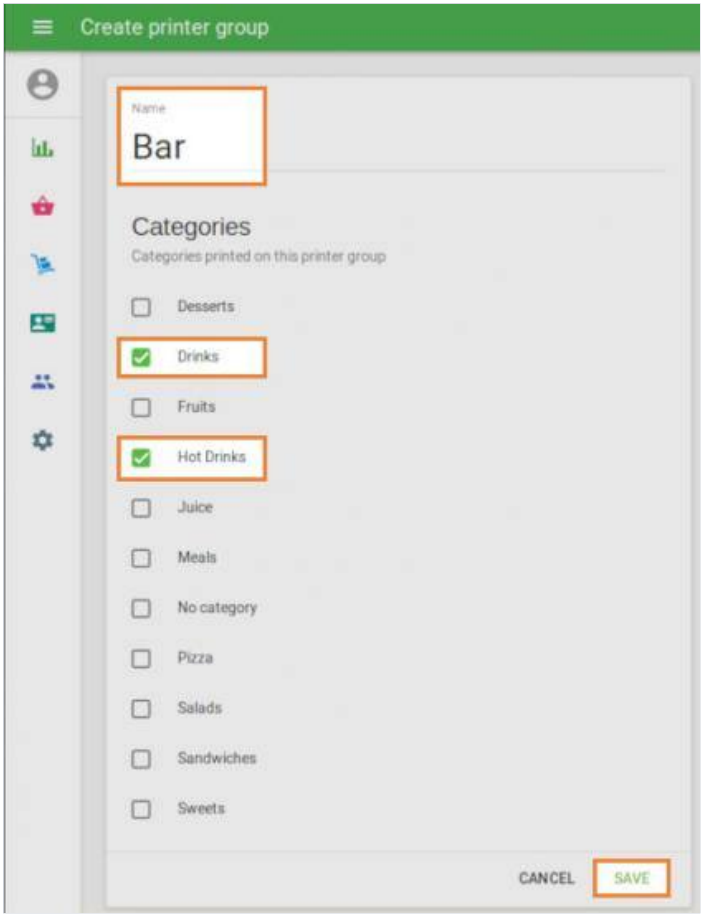
Hardware for Loyverse POS

How to Set Up Kitchen Printer for Each Kitchen Station

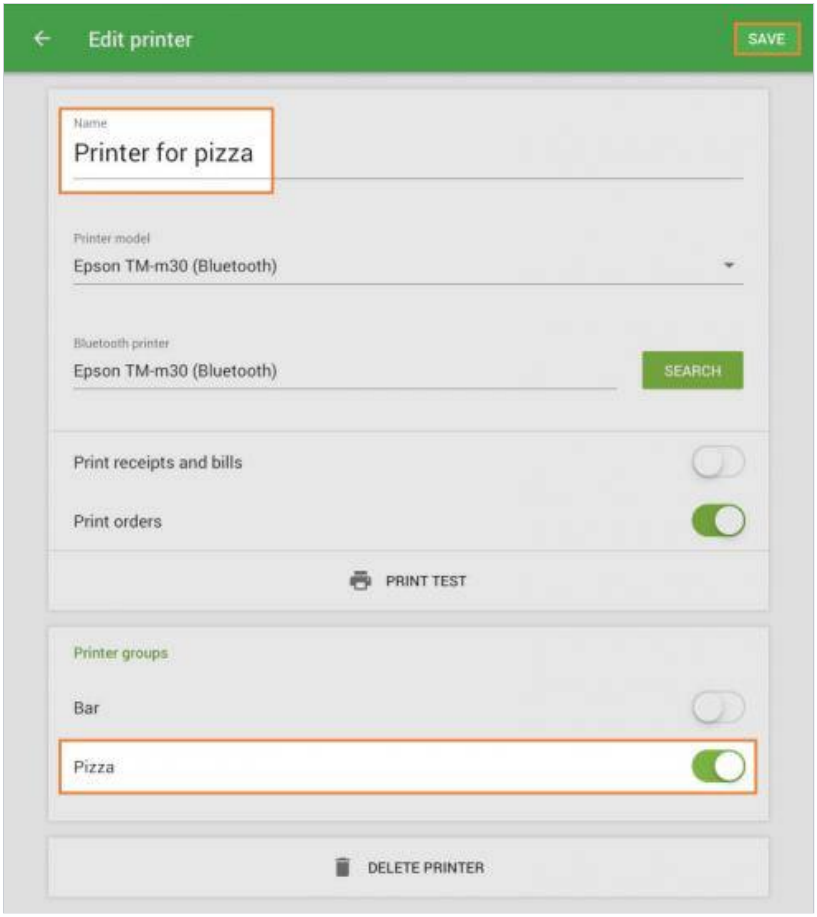
Before Setting Up: The 'Use Kitchen Printers' option should be activated in your Back Office (see Using Kitchen Printers with Loyverse POS), and printers should be set up in the Loyverse POS app (see How to set up Star ethernet printer in Loyverse POS).

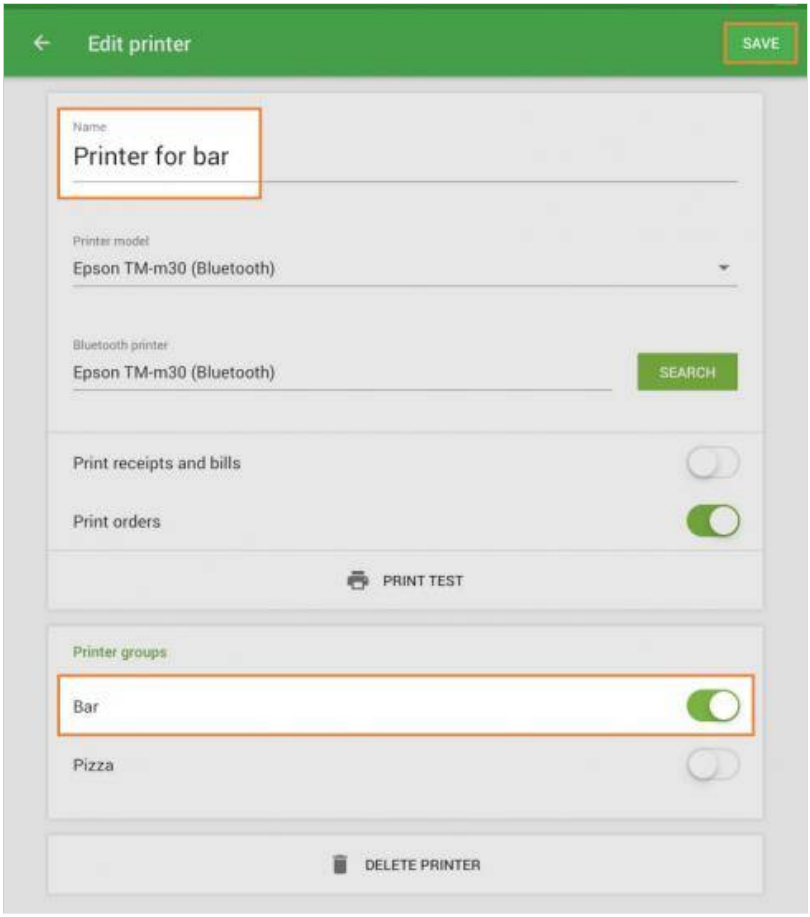
If you want to set up a separate kitchen printer for each kitchen station, create printer groups and assign categories to them in the Back Office.



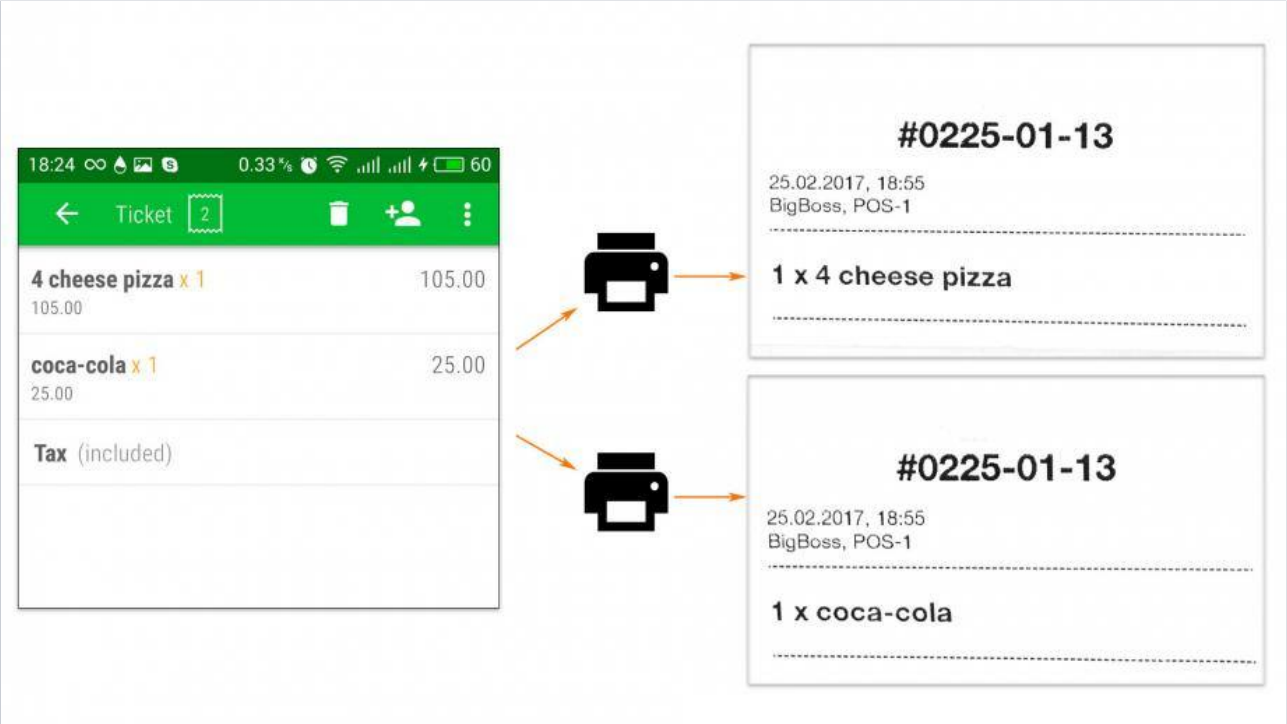


On the Loyverse POS app, assign each printer to its own printer group.


Edit printer
SAVE
Name
Printer for pizza
Printer model
Epson TM-m30 (Bluetooth)
Bluetooth printer
Epson TM-m30 (Bluetooth)
SEARCH
Print receipts and bills
Print orders
PRINT TEST
Printer groups
Bar
Pizza
DELETE PRINTER


Edit printer
SAVE
Name
Printer for bar
Printer model
Epson TM-m30 (Bluetooth)
Bluetooth printer
Epson TM-m30 (Bluetooth)
SEARCH
Print receipts and bills
Print orders
PRINT TEST
Printer groups
Bar
Pizza
DELETE PRINTER

Now, when a customer orders, two kitchen printers produce tickets with the list of items from their categories.



See also:

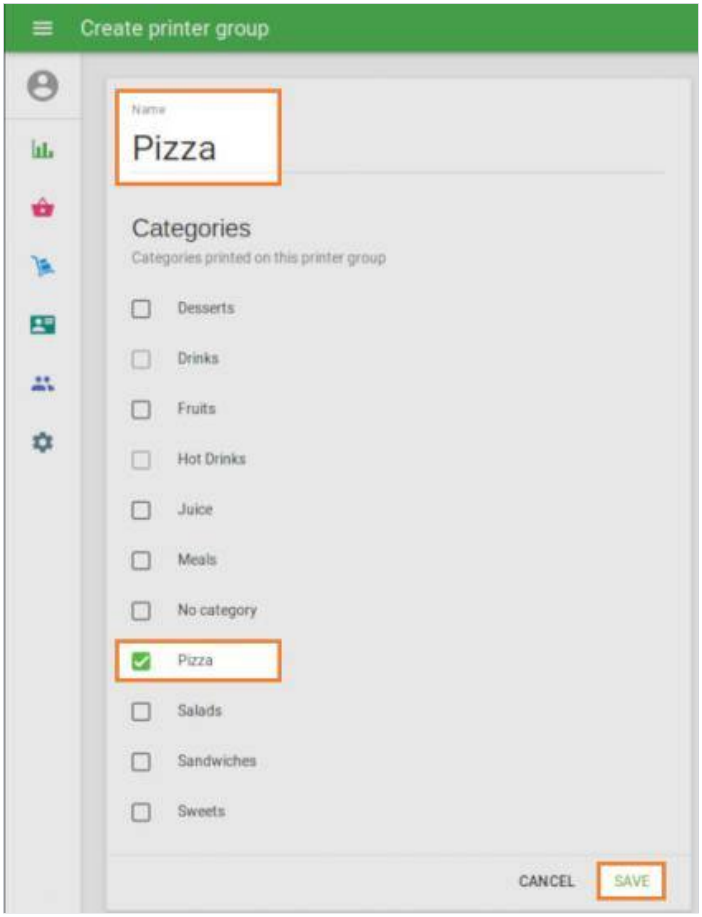
Open Tickets

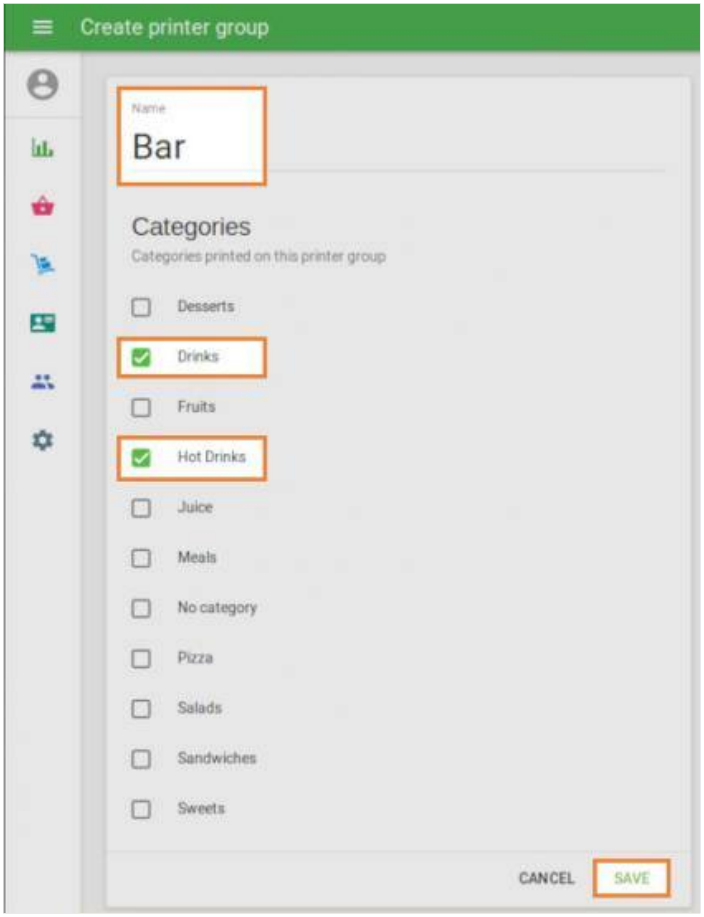
How to Set Up Multiple Kitchen Stations to Share One Printer

How to Set Up Multiple Kitchen Stations to Share One Printer

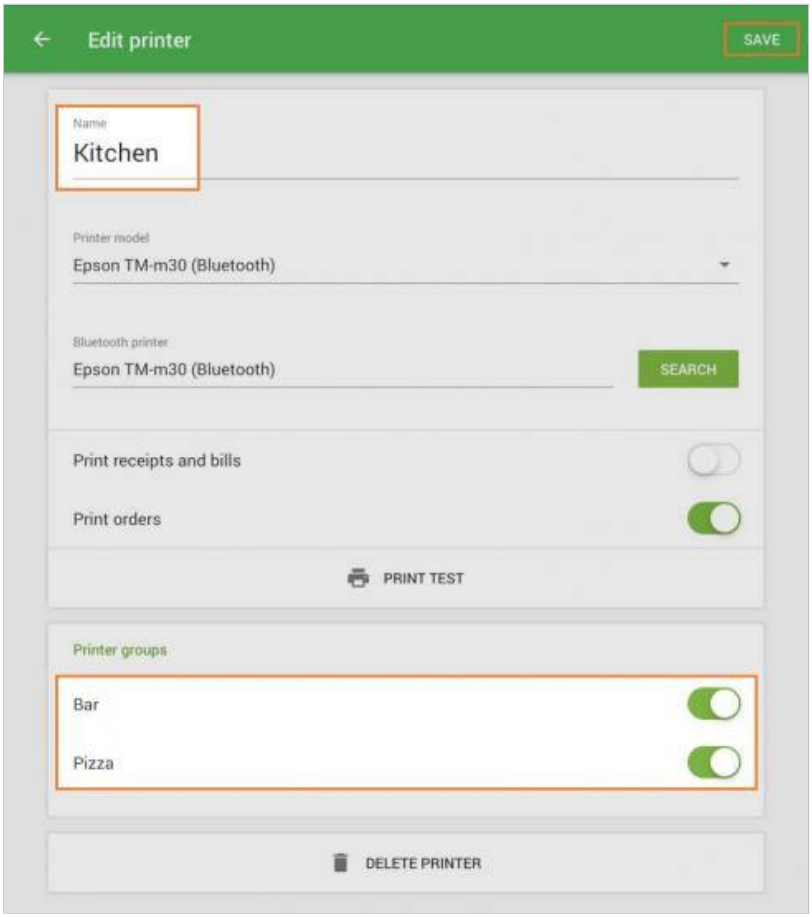
Before Setting Up: The 'Use Kitchen Printers' option should be activated in your Back Office (see Using Kitchen Printers with Loyverse POS), and printers should be set up in the Loyverse POS app (see How to Set Up Ethernet Printer in Loyverse POS).

If you want to print tickets from multiple kitchen stations with one printer, create a few printer groups and assign categories to them in the Back Office.

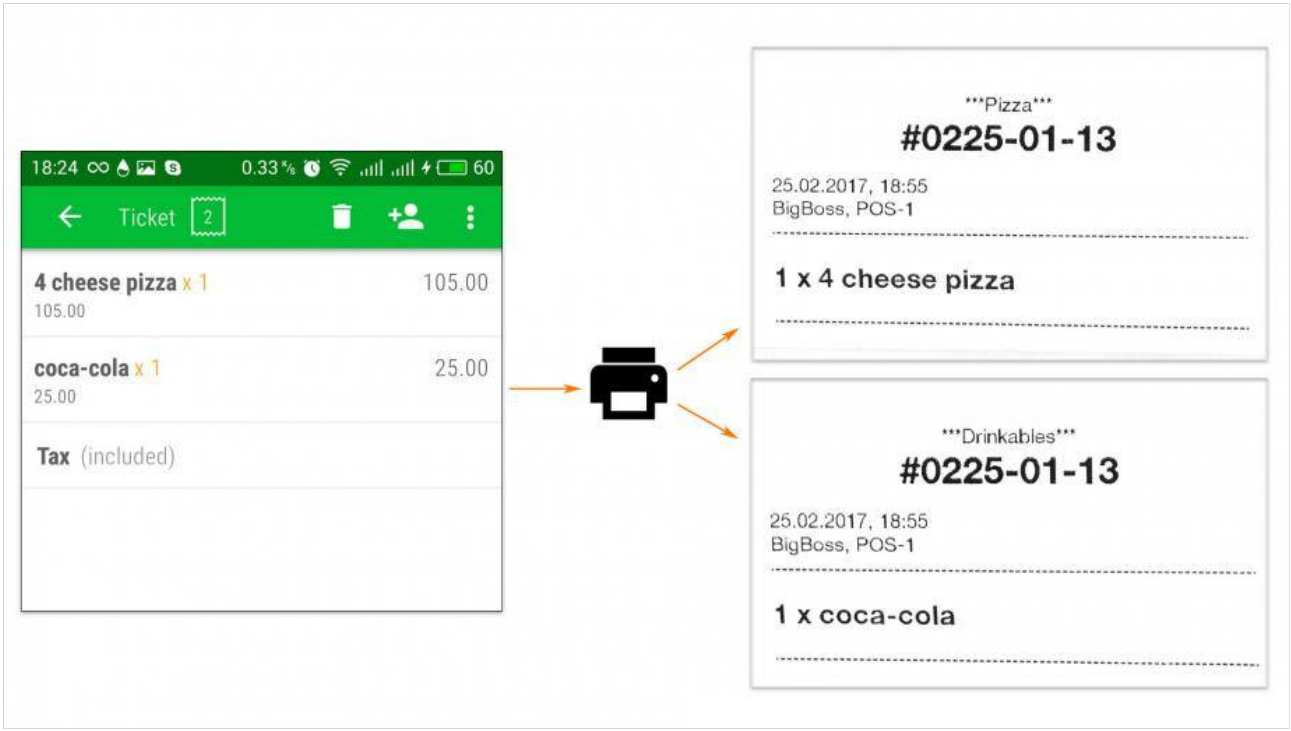

Create printer group
Name
Pizza
Categories
Categories printed on this printer group
Desserts
Drinks
Fruits
Hot Drinks
Juice
Meals
No category
Pizza
Salads
Sandwiches
Sweets
CANCEL
SAVE


Create printer group
Name
Bar
Categories
Categories printed on this printer group
Desserts
Drinks
Fruits
Hot Drinks
Juice
Meals
No category
Pizza
Salads
Sandwiches
Sweets
CANCEL
SAVE

On the Loyverse POS app, assign each individual printer to both printer groups.



Now, when a customer orders, the kitchen printer will create two tickets for both kitchen stations with their own list of items.



See also:

Open Tickets

How to Set Up Kitchen Printer for Each Kitchen Station

How to Connect Kitchen Printer Bell (Buzzer)

A bell (buzzer) can be connected to your kitchen printer to alert cooking staff whenever a new order is printed.



Compatibility

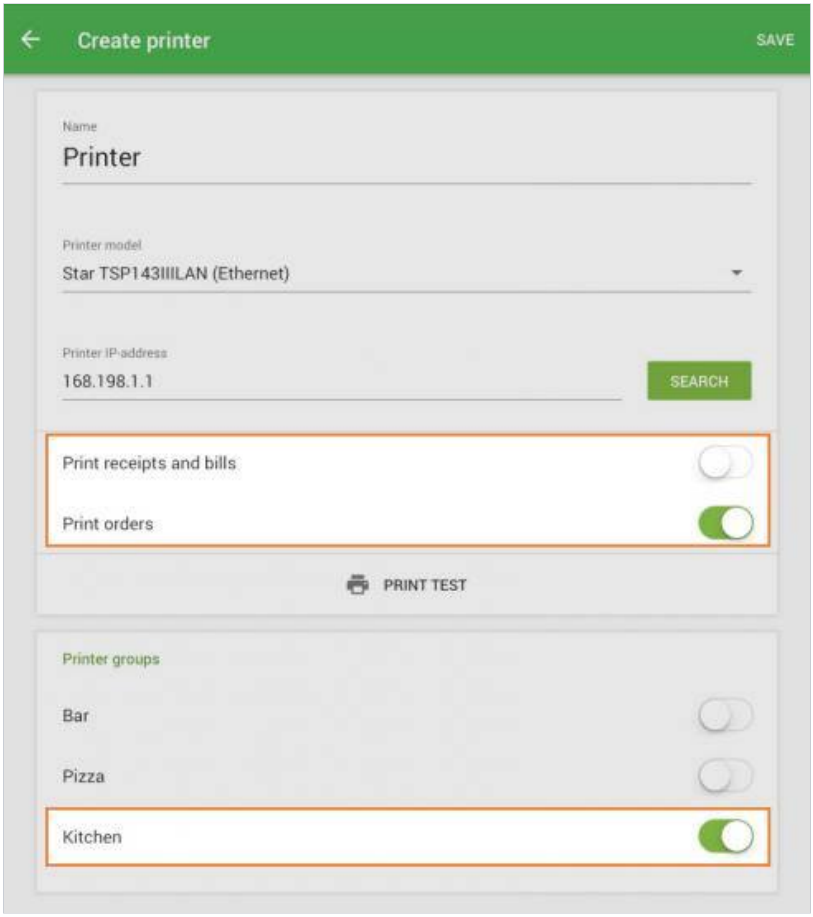
Most receipt printers have a dedicated cash drawer port, typically an **RJ11 connector**, which is also used for the bell. Check your receipt printer and bell (buzzer) manuals to confirm they are compatible. As long as the receipt printer is supported by Loyverse POS, a compatible bell can be used with it as well.

Important: If the same printer is used for both **Print Receipts and Bills** and **Print Orders**, the RJ11 socket will only function as a cash drawer trigger — the bell will not ring. To use a bell, the printer must be dedicated to kitchen order printing.

Prerequisites

Before connecting the bell, make sure the following are already configured:

- Your kitchen printer is **paired with Loyverse POS**.
- The **Use Kitchen Printers** option is enabled in the Back Office settings.
- A **printer group** has been created with the associated item categories.
- In the printer settings within the POS app, the **Print Orders** option is enabled and the appropriate printer groups are selected.



Connecting the Bell (Buzzer)

Locate the **RJ11 socket** on your kitchen printer.

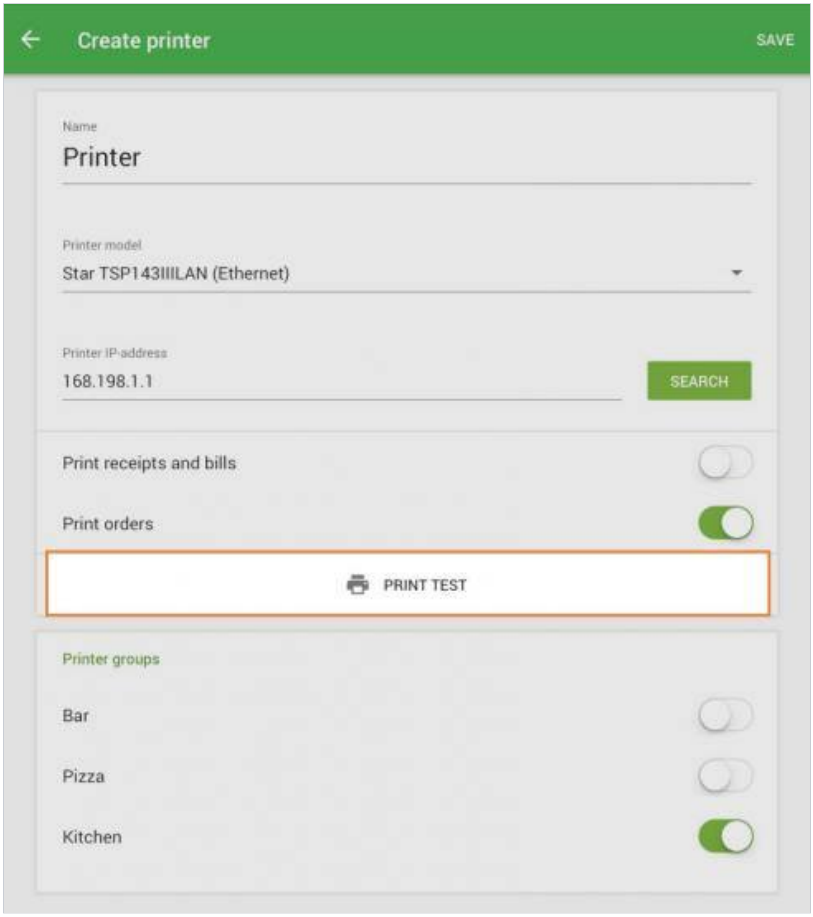


Plug the bell (buzzer) cable into the socket.



Turn the printer on.

Tap **Print Test** in the POS printer settings to verify everything is working correctly. The bell will ring just before the test order is printed.



How the Bell Works

Once setup is complete, the bell (buzzer) will ring in the following situations:

- Every time a **new order is sent** to the kitchen printer.
- When a **previously printed order is cancelled**.

See also:

Using Kitchen Printers with Loyverse POS

Barcode Scanners

Supported Barcode Scanners

Android

Loyverse POS for Android supports any barcode scanner that uses the **HID protocol**. Compatible scanners can connect via:

- **Bluetooth**

- **USB** (using a USB OTG adapter or cable)

iOS

Due to platform restrictions, Loyverse POS for iOS supports only the following scanner models:

Model	Notes
Socket Mobile 7Ci	
Socket Mobile 7Qi	
Socket Mobile S700	
Socket Mobile S720	
Socket Mobile S721	Works through the Socket Mobile Companion App
Socket Mobile S740	
Socket Mobile S800	
BCR-POP1	Must be connected through an mPOP printer

Note: Some new Socket Mobile Bluetooth barcode scanners do not have HID settings, but work with the Loyverse POS app through the **Socket Mobile Companion App** installed on Android and iOS mobile devices.

See also:

How to Connect a USB Barcode Scanner to an Android Device

How to Setup Motorola CS3070 (Bluetooth) Barcode Scanner

Socket 7Qi/7Ci (Bluetooth) Barcode Scanner Setup

How to Connect a USB Barcode Scanner to an Android Device

If your Android smartphone or tablet supports **USB On-The-Go (OTG)**, you can use a USB barcode scanner with the Loyverse POS app.

What You'll Need

A **USB OTG adapter or cable** to connect the scanner to your device. It has a female USB connector on one end (for the scanner) and a male **micro-USB** or **USB-C** connector on the other (for your device).





Connecting the Scanner

1. Plug the **USB barcode scanner** into the OTG adapter or cable's female USB connector.
2. Plug the **micro-USB or USB-C end** of the OTG adapter or cable into the USB port of your Android device.
3. Wait for the system to recognize the scanner.



Next Steps

Once the scanner is connected, you're ready to:

- Add barcodes to your items
- Sell items using a barcode scanner

Socket 7Qi/7Ci (Bluetooth) Barcode Scanner Setup

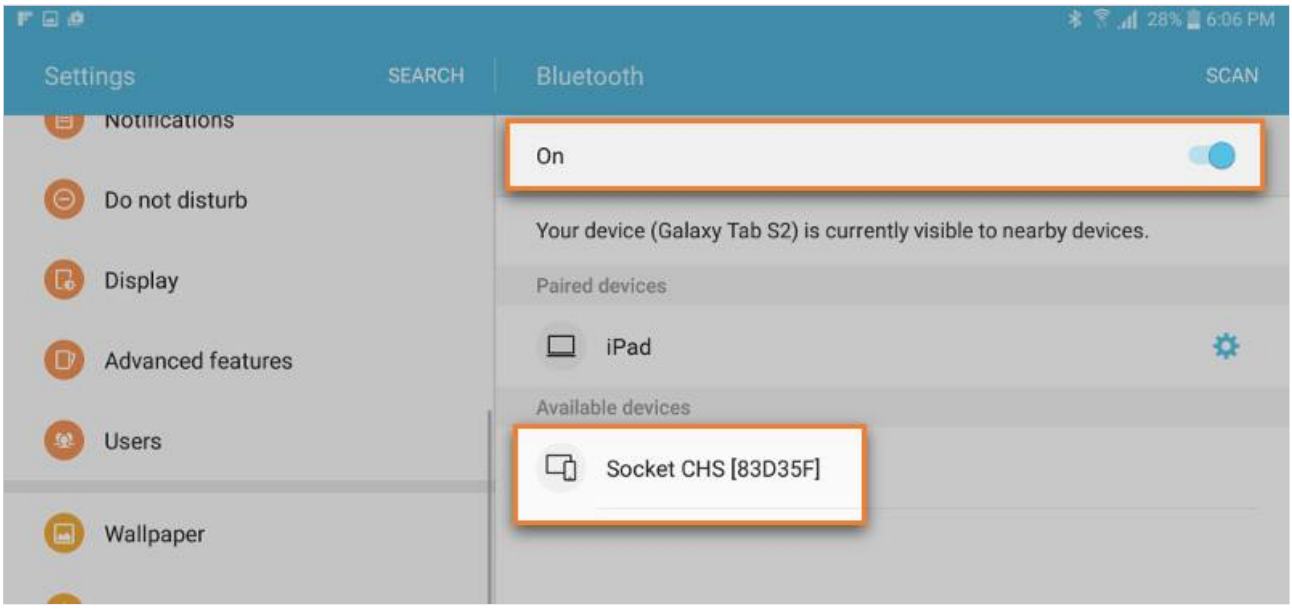
1. Connecting scanner to Android Mobile Device

When working with the Loyverse POS app on your **Android Mobile Device**, the Socket 7Qi/7Ci (Bluetooth) scanner should be connected in the Human Interface Device (HID) Basic Mode.

Power on the scanner and configure it to the connection mode by scanning this barcode:

#FNB00F40000#

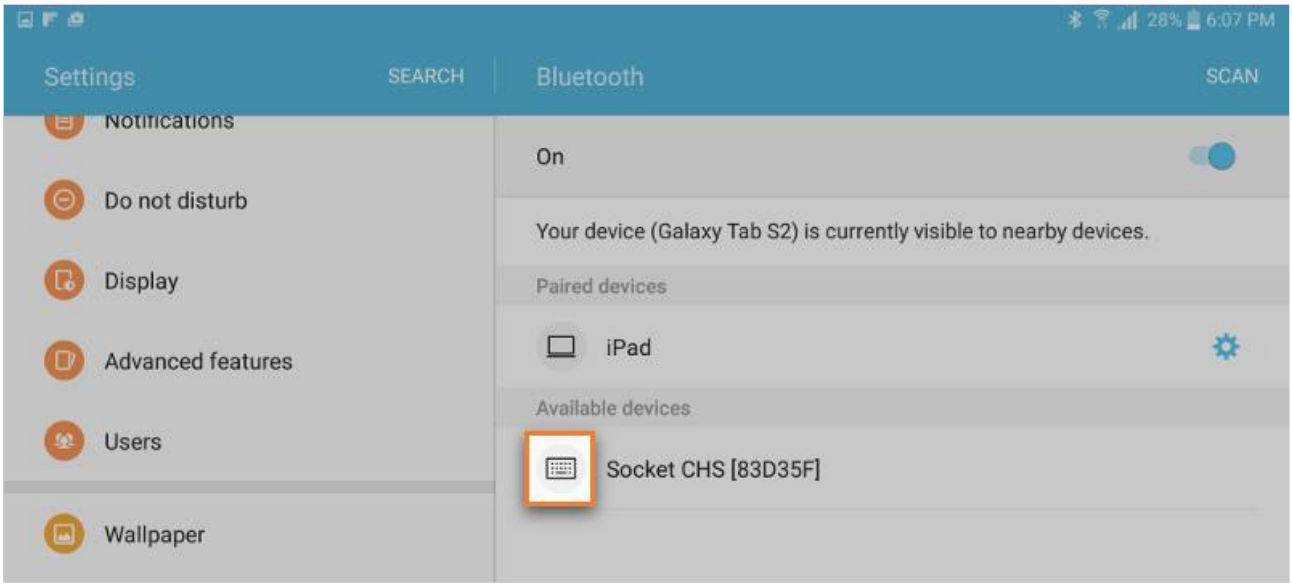
Turn Bluetooth on in your device. Go to Settings > Bluetooth. A Bluetooth Device search will begin.
You will see your scanner in the list.



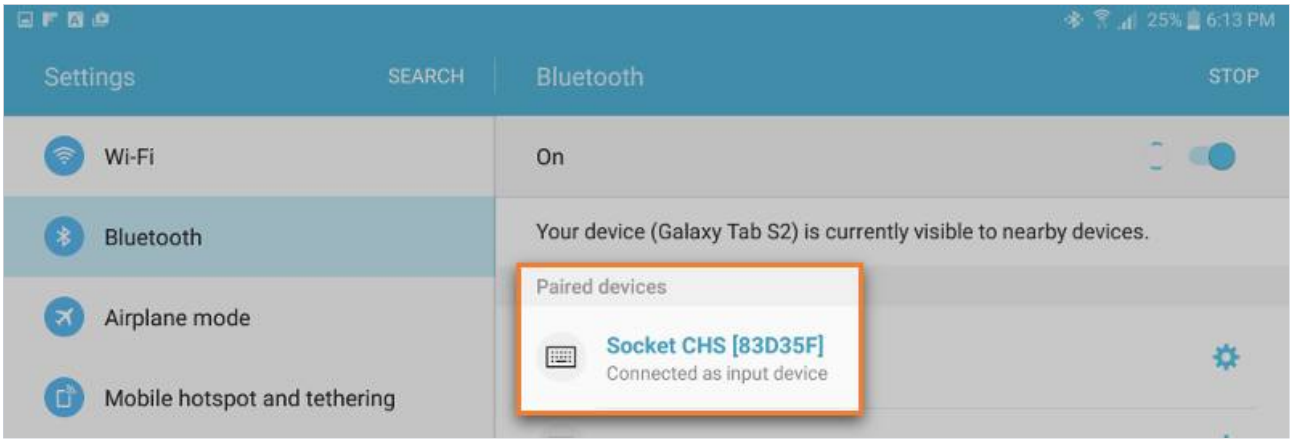
Configure the scanner to Human Interface Device (HID) Basic Mode, as a Keyboard class device, by scanning this barcode:

#FNB00F40001#

The scanner icon will be changed to the keyboard.



Tap on your Socket scanner in the list of Devices. After a few seconds, the “Not Paired” status will change to “Connected” or “Paired” and the scanner's Blue LED will start blinking every 3 seconds, confirming the connection.



Now, in your Loyverse POS app, go to the ‘Sales’ menu. When you scan the item with a barcode, this item will be added to the ticket.

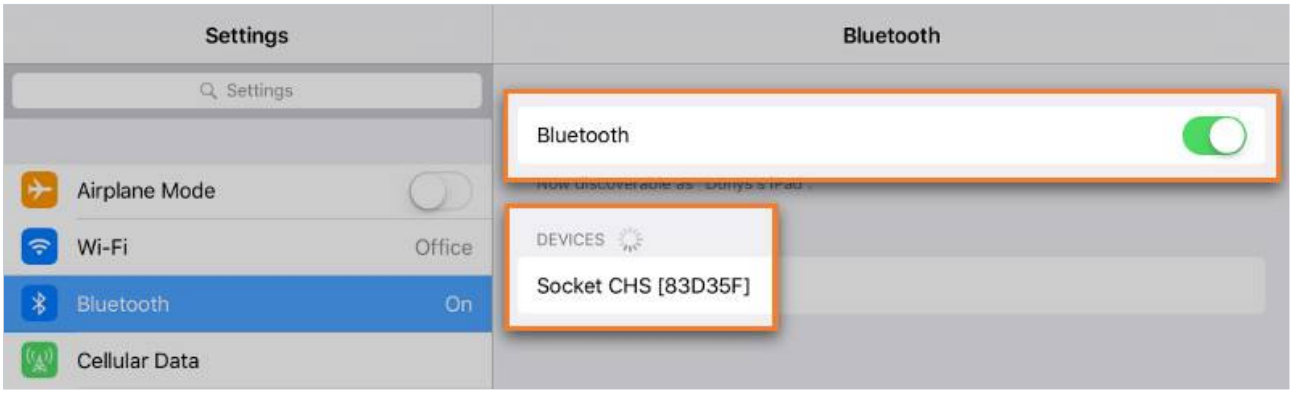
2. Connecting scanner to Apple iOS device

When working with the Loyverse POS app on the **Apple iOS device** Socket 7Qi/7Ci (Bluetooth) scanner should be connected in Application Mode.

Power on the scanner. To change the profile to Application Mode, scan this barcode:

#FNB00F40002#

Turn on Bluetooth on the Apple device. Go to Settings > Bluetooth.
The Bluetooth device search will begin.



Tap on your Socket scanner in the list of Devices found. After a few seconds, the “Not Paired” status will change to “Connected” or “Paired” and the scanner’s blue LED will blink every 3 seconds, confirming the connection.



Now in your Loyverse POS app, go to the ‘Sales’ menu. When you scan the item with the barcode, this item will be added to the ticket.

See also:

[How to Add Barcodes to Items]

[How to Sell Items Using Barcode Scanners]

[Hardware for Loyverse POS]

How to Setup Motorola CS3070 (Bluetooth) Barcode Scanner

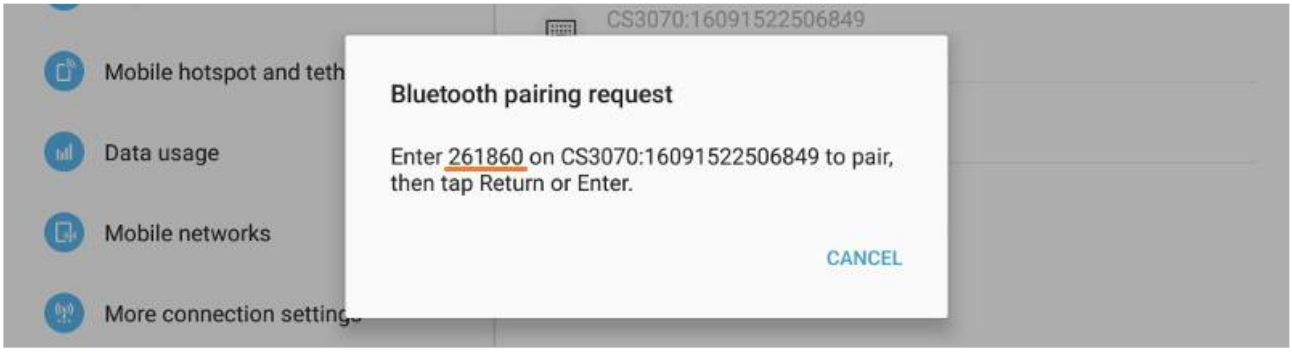
Press the scan button (+) to wake the scanner.

Press and hold the Bluetooth button (round button) for five seconds. The scanner beeps and the Bluetooth button starts blinking quickly to indicate that the scanner is discoverable by the host.

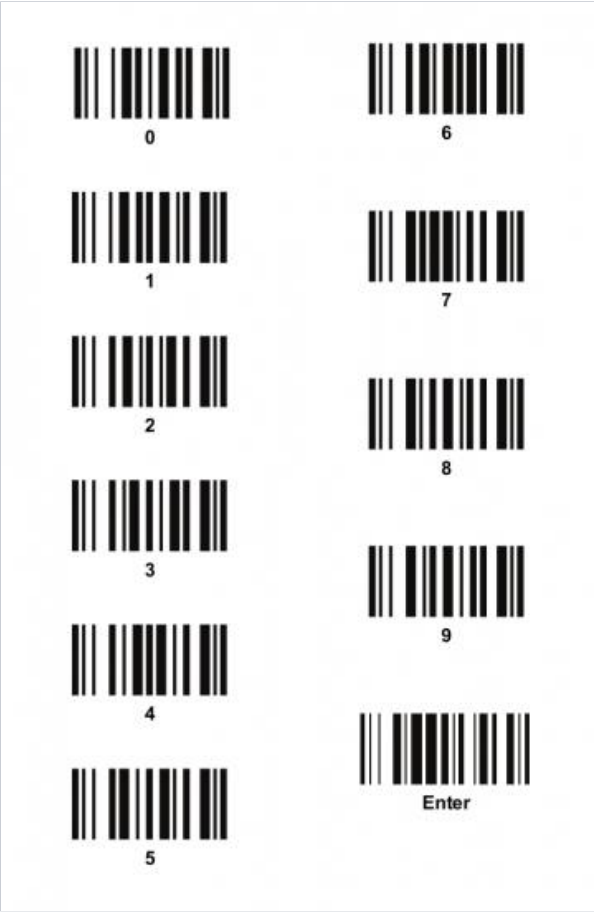
On your mobile device, turn on Bluetooth and let it search for devices. You will see your scanner in the list.



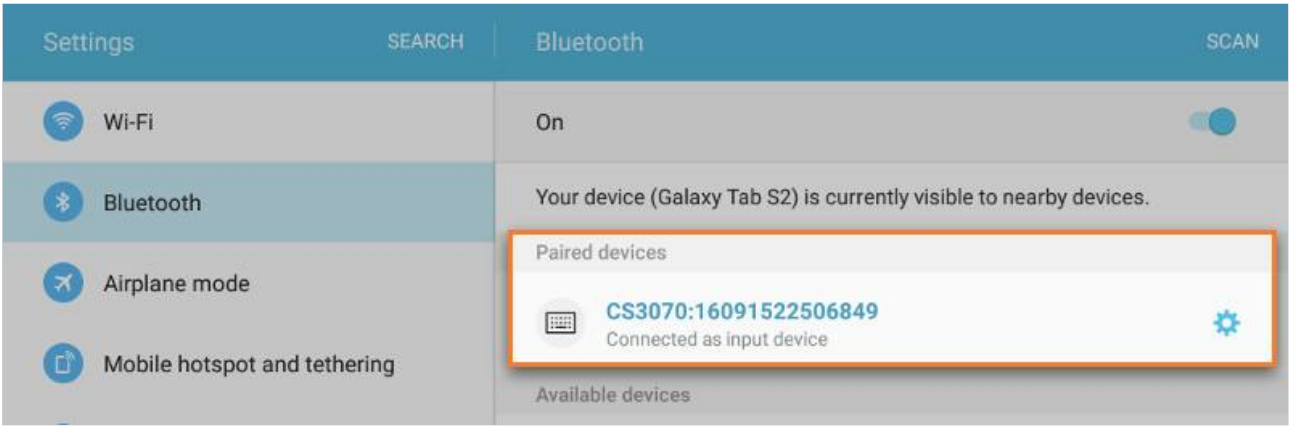
Select the CS3070 from the discovered device list. The Bluetooth application will prompt you to scan the pass key it generated.



Scan Numeric Barcodes corresponding to the passkey, one by one, then scan the Enter code.



The Bluetooth button blinks slowly to indicate that the scanner is paired with the host.



Now, in your Loyverse POS app, go to the ‘Sales’ menu. When you scan the item with a barcode, this item will be added to the ticket.

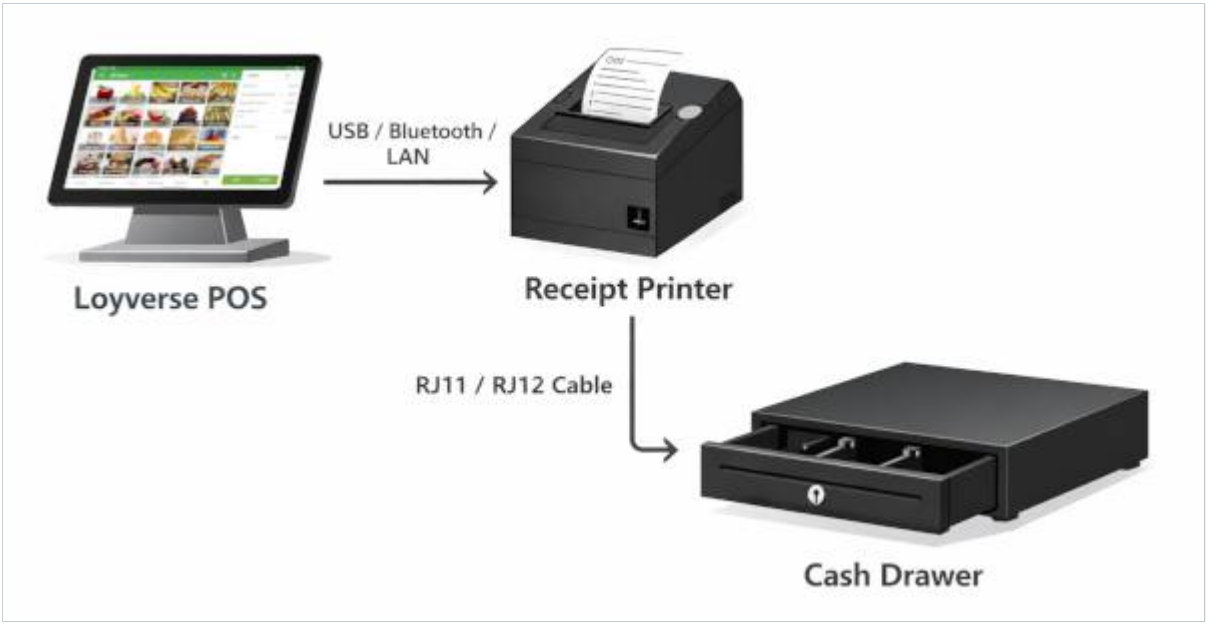
See also:

How to Add Barcodes to Items

How to Sell Items Using Barcode Scanners

Supported Cash Drawers

Loyverse POS supports **printer-driven cash drawers**. This means the cash drawer is connected directly to a **receipt printer**, and the printer is connected to the mobile device with the Loyverse POS app. When a sale is completed or the cash drawer is triggered, the printer sends a signal to open the drawer.



Cash Drawer Compatibility

Loyverse does not require a specific brand of cash drawer. You can use **any cash drawer that is compatible with your receipt printer**.

To confirm compatibility:

- Check the cash drawer's manual or specifications.
- Visit the manufacturer's website.
- Verify that the cash drawer is designed to be driven by your specific receipt printer model.

Important Technical Requirements

⚠ **Power voltage must match**

The receipt printer and the cash drawer must operate at the **same voltage**:

- **12 V** or
- **24 V**

If the printer and cash drawer use different voltages, they will **not be compatible** and may fail to work or become damaged.

This setup ensures reliable cash drawer operation during sales and cash transactions.

See also:

How to Connect a Cash Drawer

How to Connect a Cash Drawer

A cash drawer connects to your receipt printer and opens automatically when a cash sale is completed in Loyverse POS.

Compatibility

Most receipt printers have a dedicated cash drawer port, typically an **RJ11 connector**. Before purchasing or connecting a cash drawer, check that your printer and drawer are compatible by consulting both devices' manuals. As long as the receipt printer is supported by Loyverse POS, a compatible cash drawer will work with it as well.

Setup

Before connecting a cash drawer, make sure your receipt printer is already paired with Loyverse POS using the **Print Receipts and Bills** option in your app settings.

Connecting the Cash Drawer

Locate the cash drawer port on your receipt printer.



Plug the cash drawer cable into the port.



Turn the printer on.

Complete a cash sale in the Loyverse POS app (Google Play or App Store). The cash drawer will open automatically once the sale is finished.



Note: APG Vasario 1416 and Vasario 1616 cash drawers must be connected to a receipt printer using the CD 102 A cable only.

When Does the Cash Drawer Open Automatically?

In addition to completed cash sales, the cash drawer will also open in the following situations:

- A **refund receipt is printed** for cash refunds.
- An employee is **opening a shift** to enter the initial cash amount.
- An employee is **closing a shift** to calculate the final cash amount.
- A **Pay In** or **Pay Out** action is performed to add or remove cash from the drawer.
- The **Print Test** option is used to test the printer connection in the Loyverse POS app.

Opening the Cash Drawer Without Making a Sale

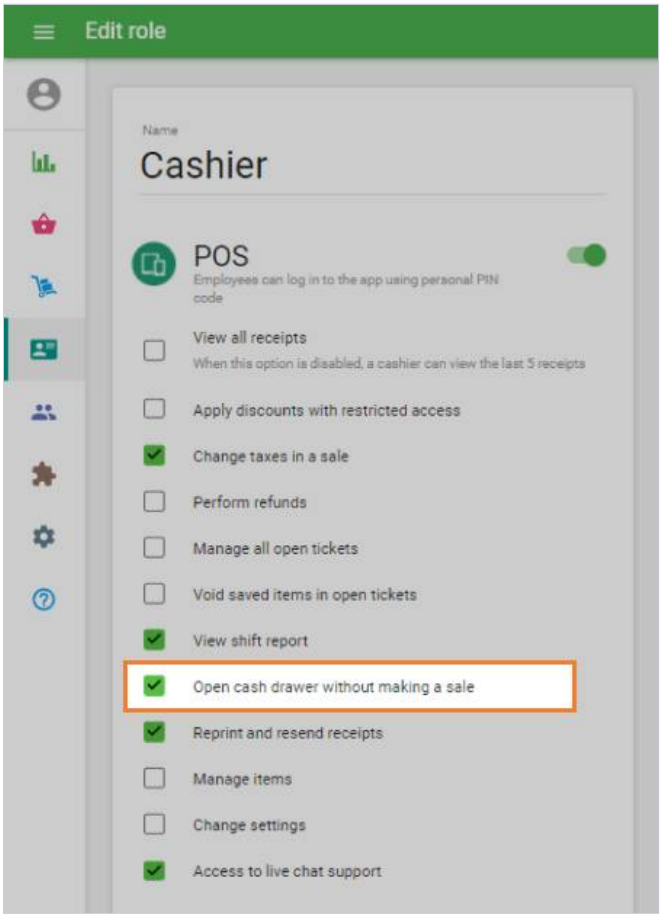
You can grant employees the ability to open the cash drawer manually, without completing a sale.

Setting the Access Right

In the Back Office, go to **Employees → Access Rights**.

Open the relevant employee group for editing.

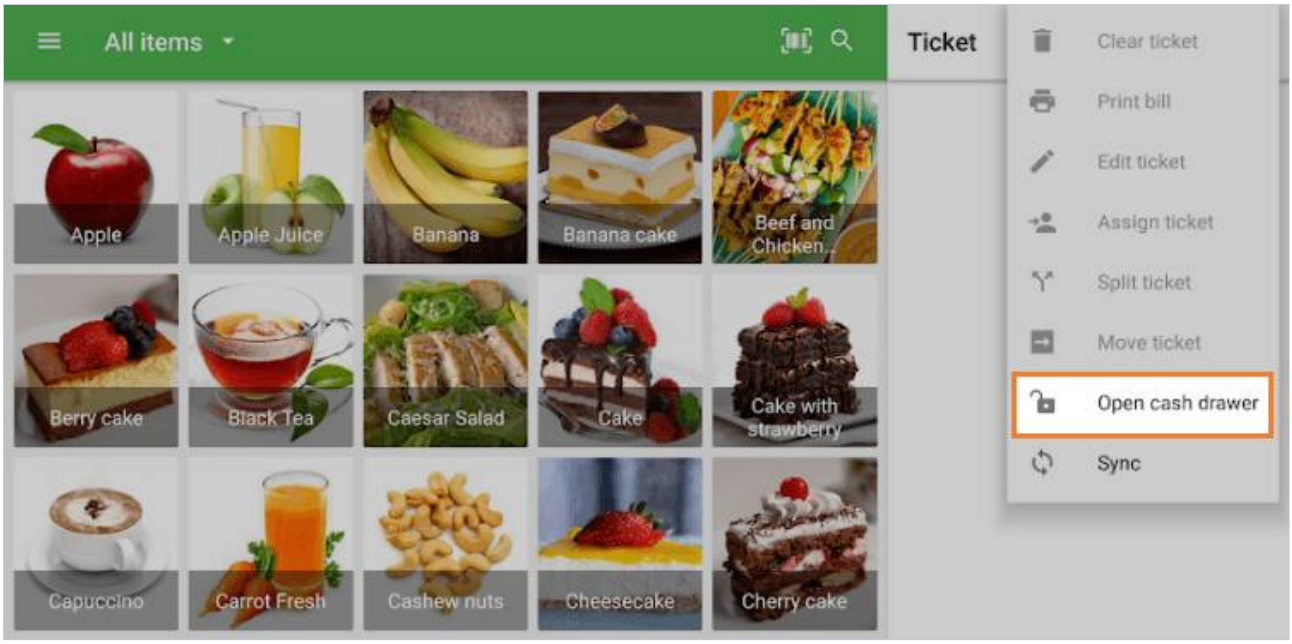
In the **POS** section, check the box **Open cash drawer without making a sale**.



Click **Save**.

Using the Feature in POS

Once the access right is enabled, the **Open Cash Drawer** button will appear in the **⋮ (More)** menu on the Sale screen of the POS app.



Note: The **Open Cash Drawer** button is only visible when at least one printer is connected with the **Print Receipts and Bills** option enabled.

See also:

How to Set Up an Ethernet Printer in Loyverse POS

Supported Cash Drawers

Kitchen Display System

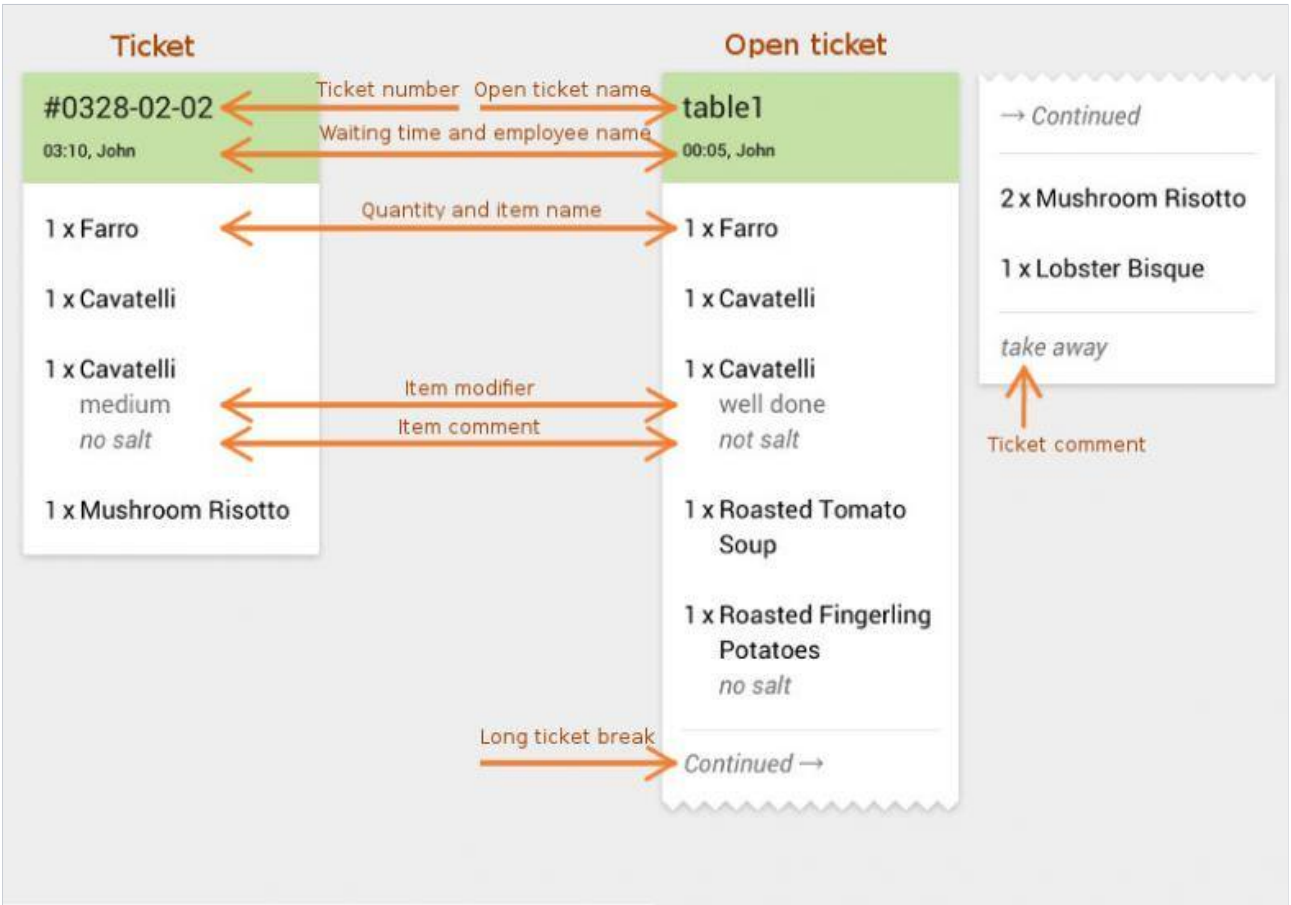
How to Use Loyverse KDS Kitchen Display

Video
https://www.youtube.com/watch?v=4vyuA_jAjBA

Please refer to the Loyverse KDS setup guide and make sure your Loyverse KDS app is configured properly and test orders appear on the kitchen display.

Now that you have **Loyverse KDS set up**, customer orders will appear on your kitchen display(s) as tickets with the list of items to prepare.

The first line of a ticket header contains either ticket number or ticket name for saved open tickets. Then there is time since the order was created and the server's name.



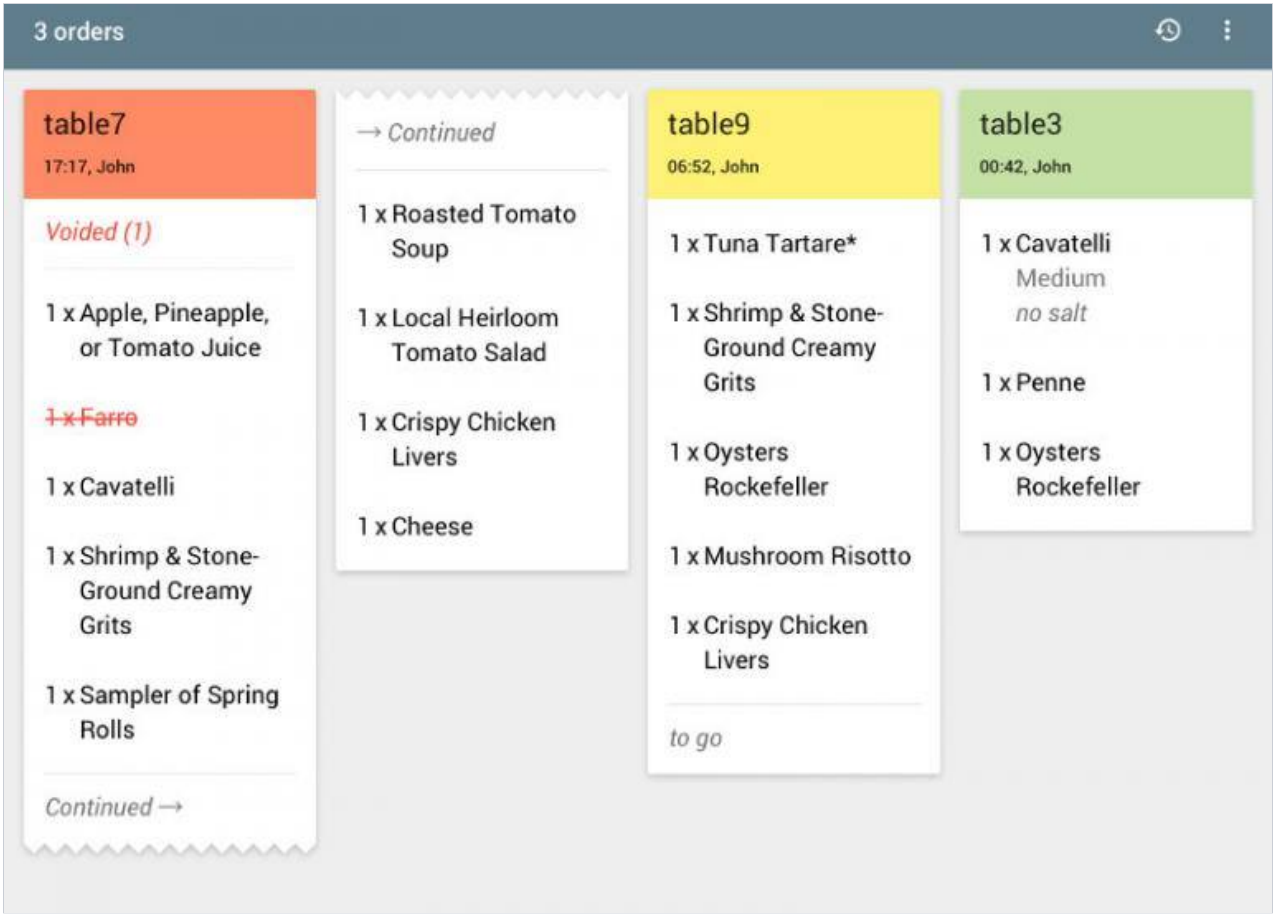
If there are item modifiers and/or comments, they will be listed just under the item name. The ticket comment is shown in the footer.

Long tickets break down to several pieces so you can still see the entire ticket on one screen without scrolling.

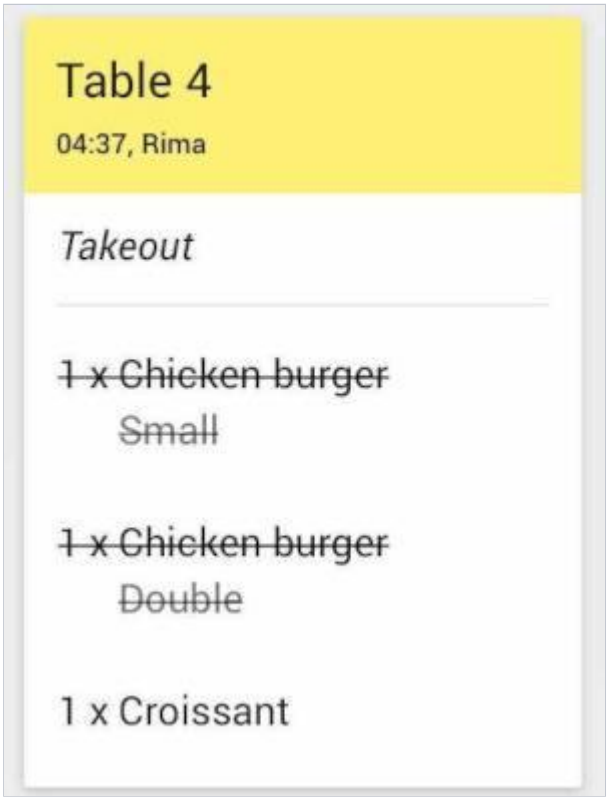
As time passes, the ticket header color will change from green to yellow to red, indicating orders that are almost or already late. The time period can be adjusted in Settings.

If you edit an open ticket and void an item, KDS will display the voided item in the ticket in red strikethrough font.

If you edit an open ticket or add an item, it will be shown as a new ticket.



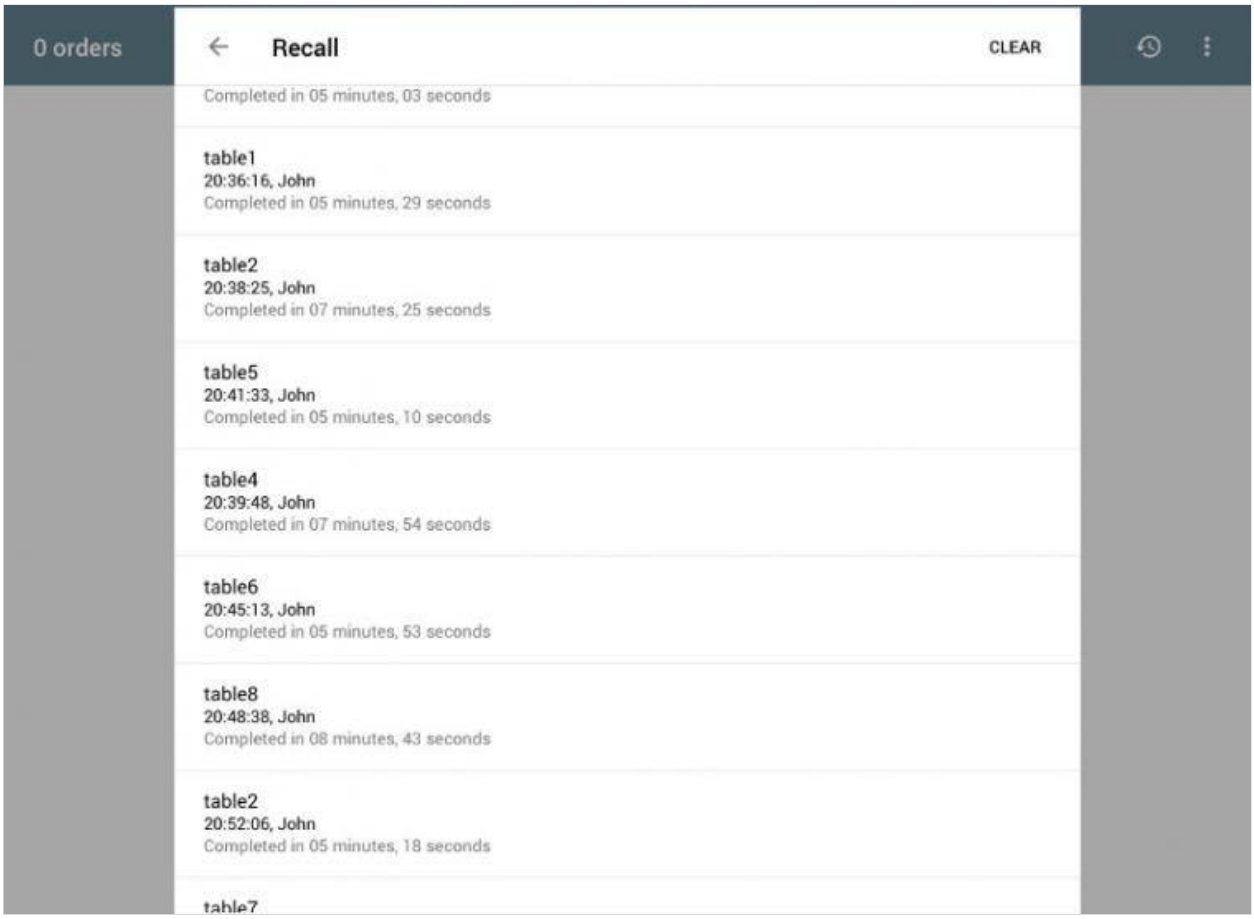
If you tick an item on the ticket, it will become strikethrough; you can use it to indicate that it is already cooked.



Tap on the ticket header to mark it complete when all the items are done.

To recall a closed ticket tap on the clock icon and tap the ticket you wish to recall.

To clear the entire list of completed tickets, tap ‘Clear’.



See also:

Kitchen Display System Configuration Guide

Using Kitchen Printers with Loyverse POS

Which tablet is the most popular among Loyverse KDS users?

Kitchen Display System Configuration Guide

Video
https://www.youtube.com/watch?v=4vyuA_jAjBA

This guide will show you how to configure Loyverse KDS. To learn more about working with kitchen display systems, please read How to Use Loyverse KDS Kitchen Display.

Cafes and restaurants use kitchen display systems (KDS) instead of kitchen printers to inform the cooking staff what to prepare from an order.

To configure:

1. Install Loyverse KDS app on a separate tablet, and place it in the kitchen, in landscape mode.
2. Specify device name in systems settings.
IMPORTANT: Make sure that both POS and KDS devices are connected to the same Wi-Fi network.
3. Configure Loyverse KDS app.
4. Create a printer group in the Back Office.
5. Pair kitchen display with Loyverse POS

That's it, you are ready to go!

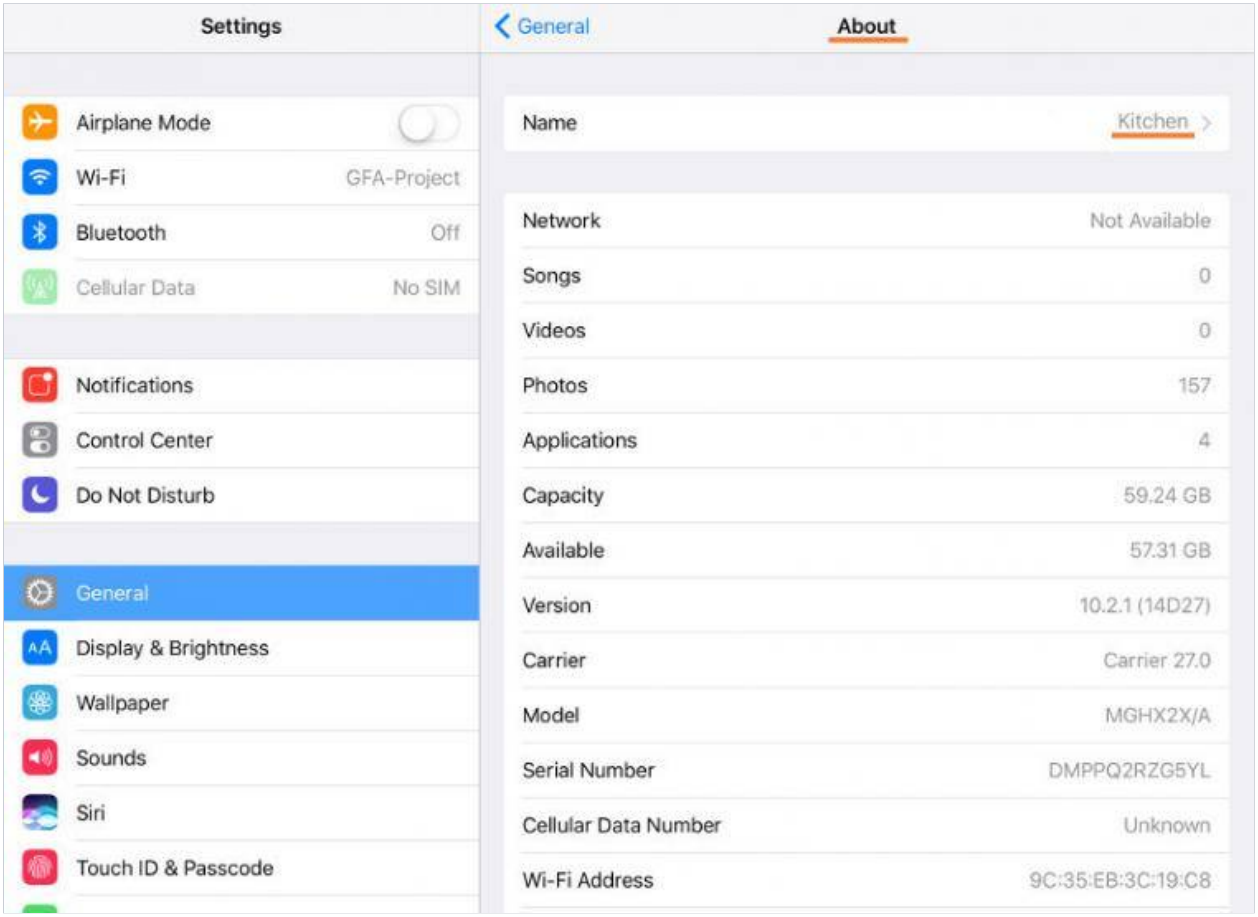
1. Install Loyverse KDS app

Download the Loyverse KDS for iPad (the recommended version of **iOS is 11.0 or higher**) or Android (**5.0 or higher**) tablet. Although the minimum requirement is 7″ display, it is recommended to use at least a 10″ tablet for better visibility. The tablet should be positioned in landscape mode.

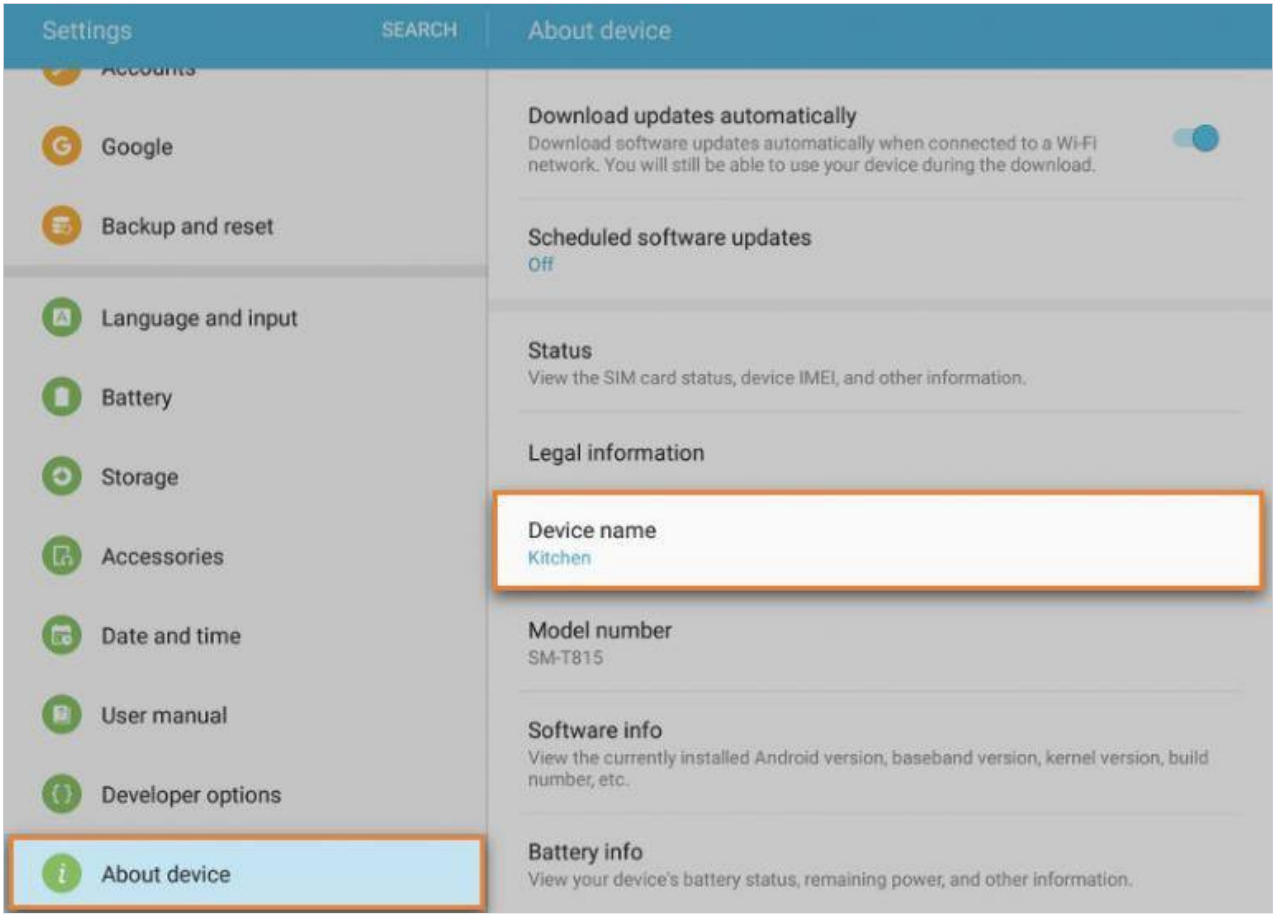
2. Specify a device name

Your Loyverse KDS app will inherit the device name. The default device name is not very informative, thus it is recommended (but not mandatory) to give your device a name reflecting its location — Kitchen, Bar, etc.

To configure the device name on an iPad, go to Settings > General > About. Tap the first line, which shows the name of your device. Rename your device, then tap Done.

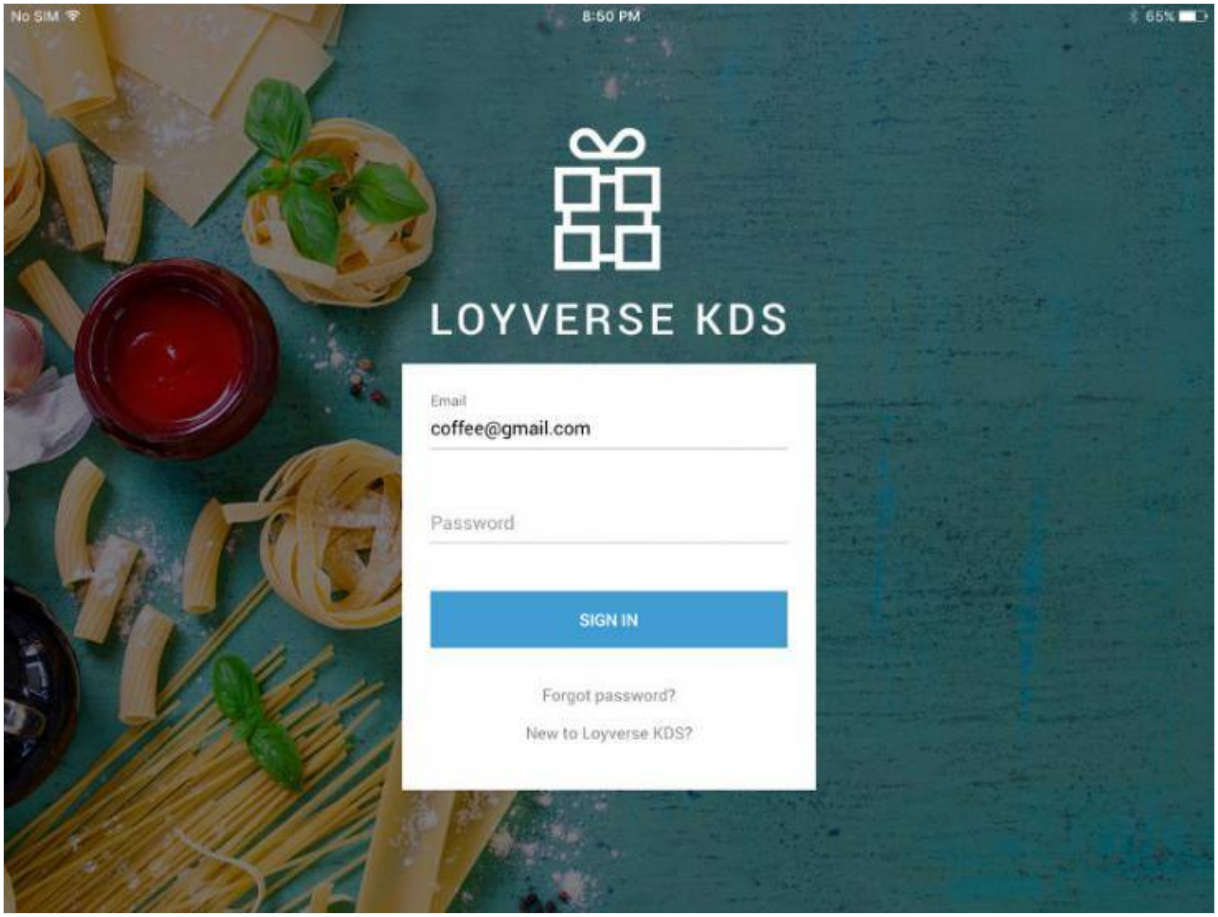


To configure a device name on an Android tablet, go to Settings > About device. On the next screen, tap Device Name, rename your device, and tap OK.

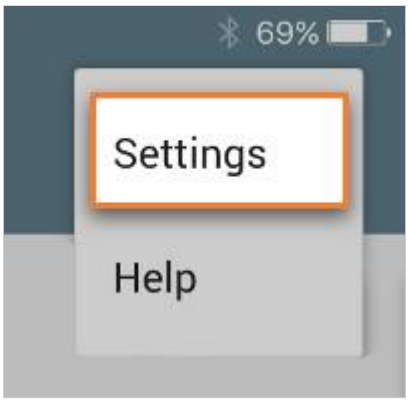


3. Configure Loyverse KDS app

Launch the app and log in with the same login and password as you use for Loyverse POS app.



Go to the menu at the right top corner (three dots) and tap Settings.



To use sound notifications, turn the ‘Order notification sound’ option on and choose a sound from your device. The sound will be played each time a new order appears.

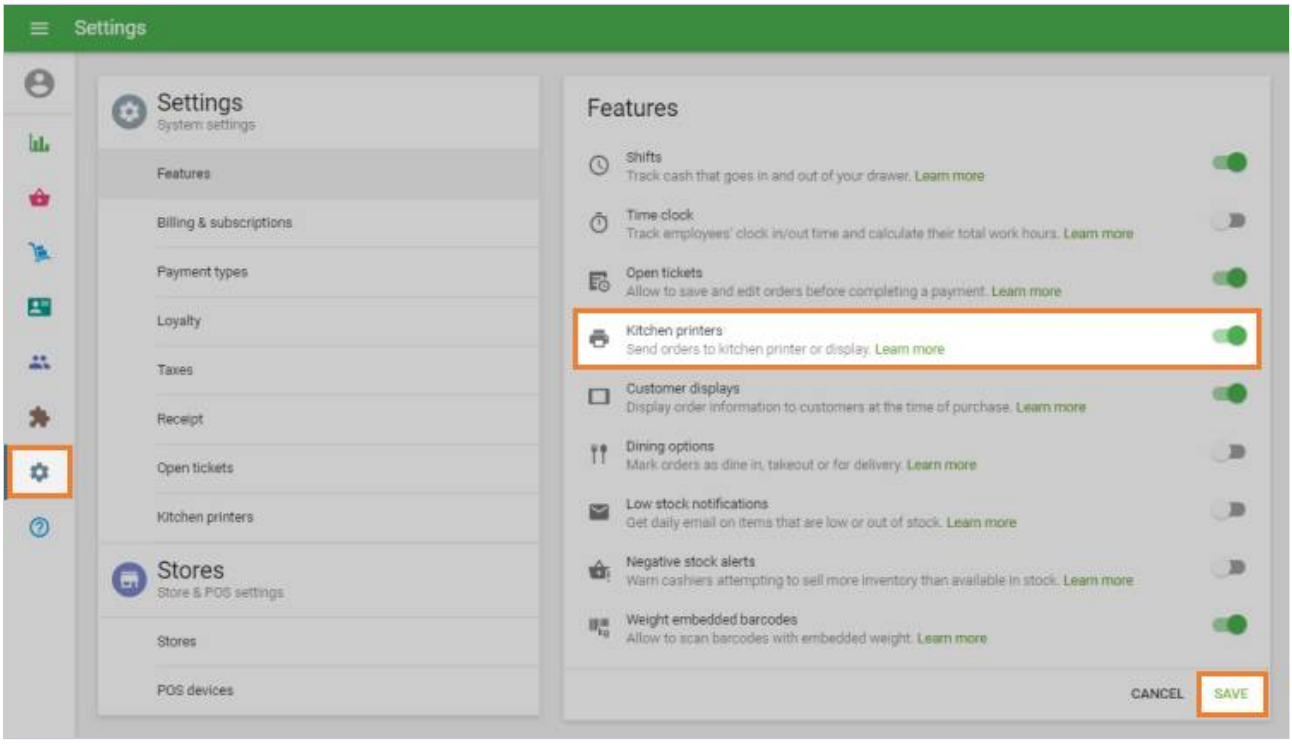
You will also want to adjust the time intervals after which the ticket headers will change their color to warning (yellow) and late (red). Default values are 4 minutes (240 seconds) and 7 minutes (420 seconds).



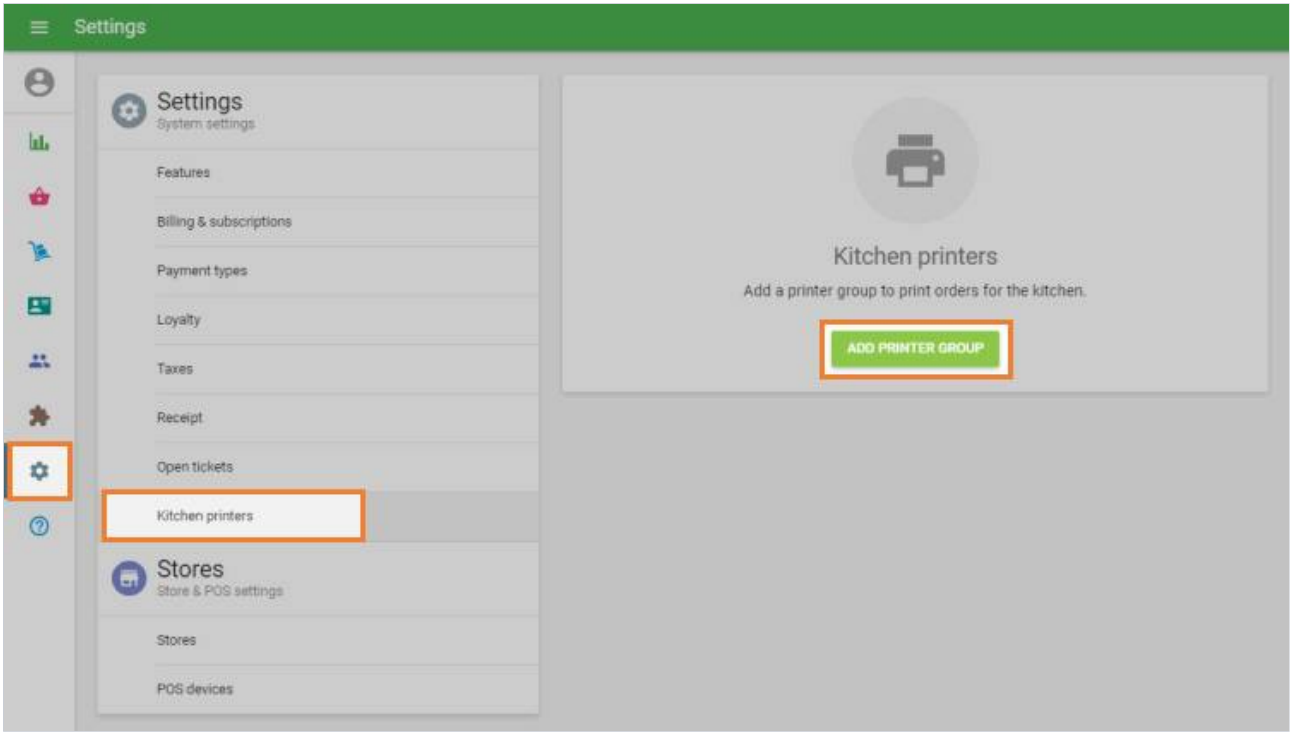
4. Create a printer group

Loyverse POS treats kitchen display as a kitchen printer, therefore the Back Office configuration for a kitchen display is the same as for kitchen printers.

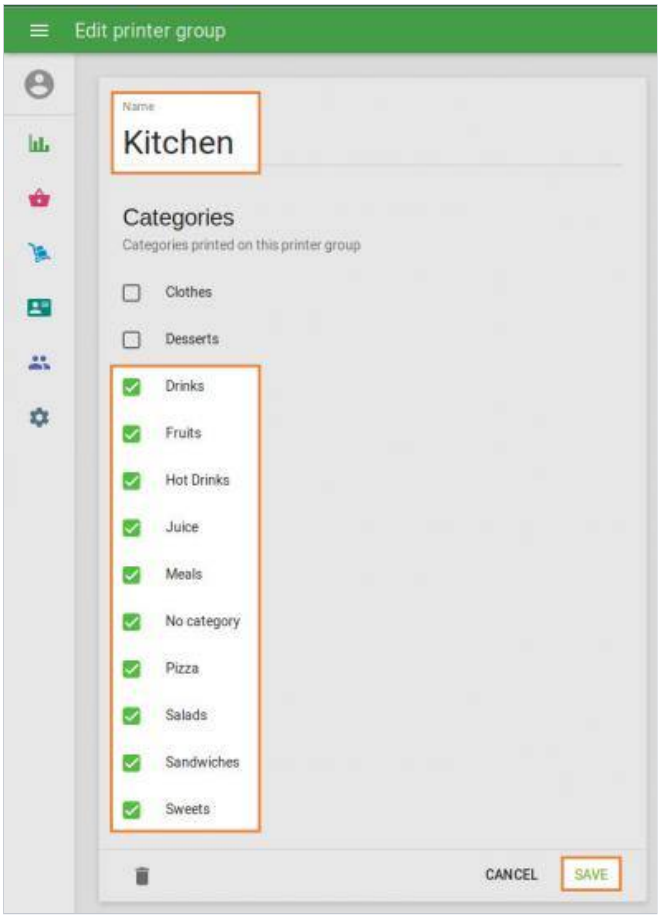
Log in to the Back Office, navigate to the Settings menu and switch on the "Kitchen Printers" slider in the "Features" section.



Click the "Kitchen Printers" menu and create a printer group.



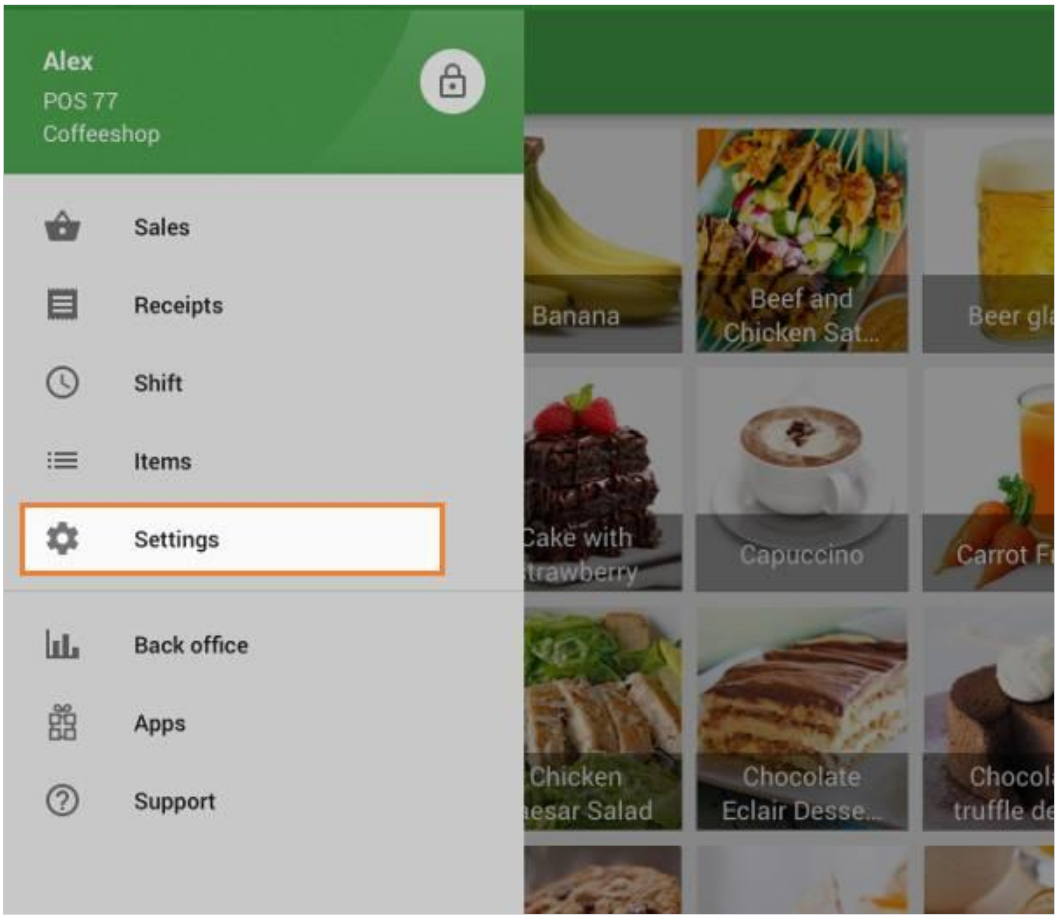
Give the printer group a name. Tick item categories that should be included in this printer group and save your selection.



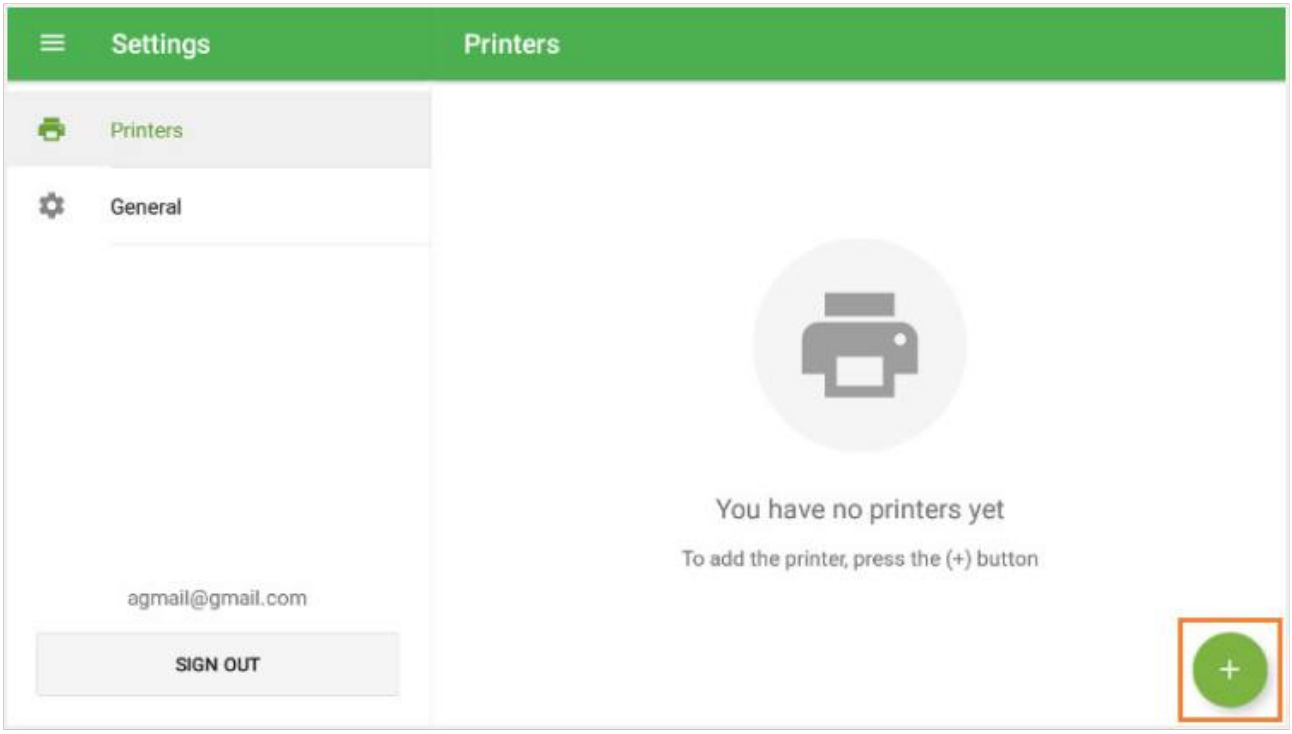
5. Pair kitchen display with Loyverse POS

First, make sure that all mobile devices with Loyverse KDS and Loyverse POS are connected to the same Wi-Fi router.

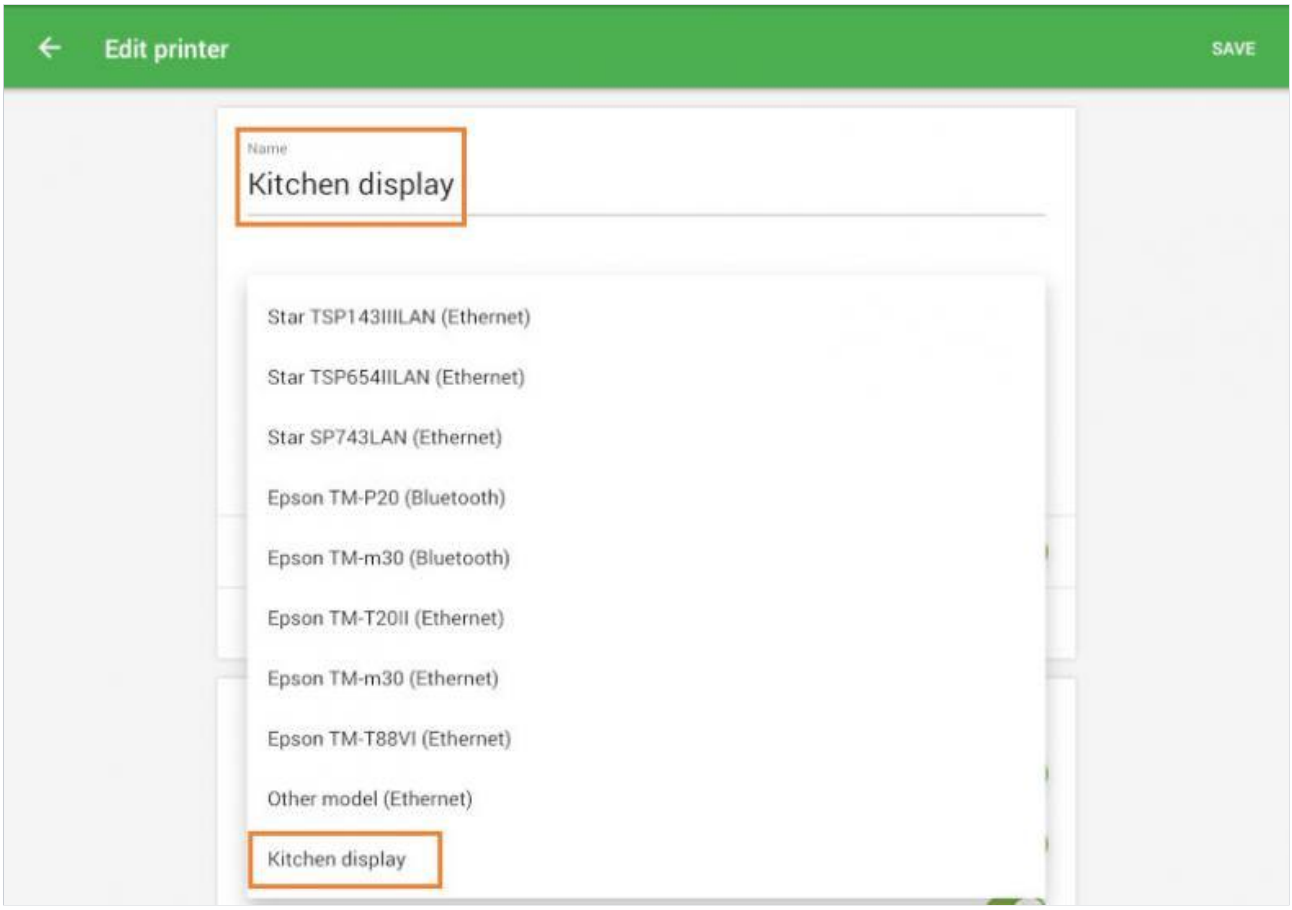
Then launch Loyverse POS and go to Settings > Printers.



Tap the ‘+’ button to add a kitchen display as a printer.



Enter your kitchen display name into the ‘Printer name’ field and select Kitchen Display from the drop-down menu.



Tap the ‘Search’ button to search the network for available kitchen display devices.



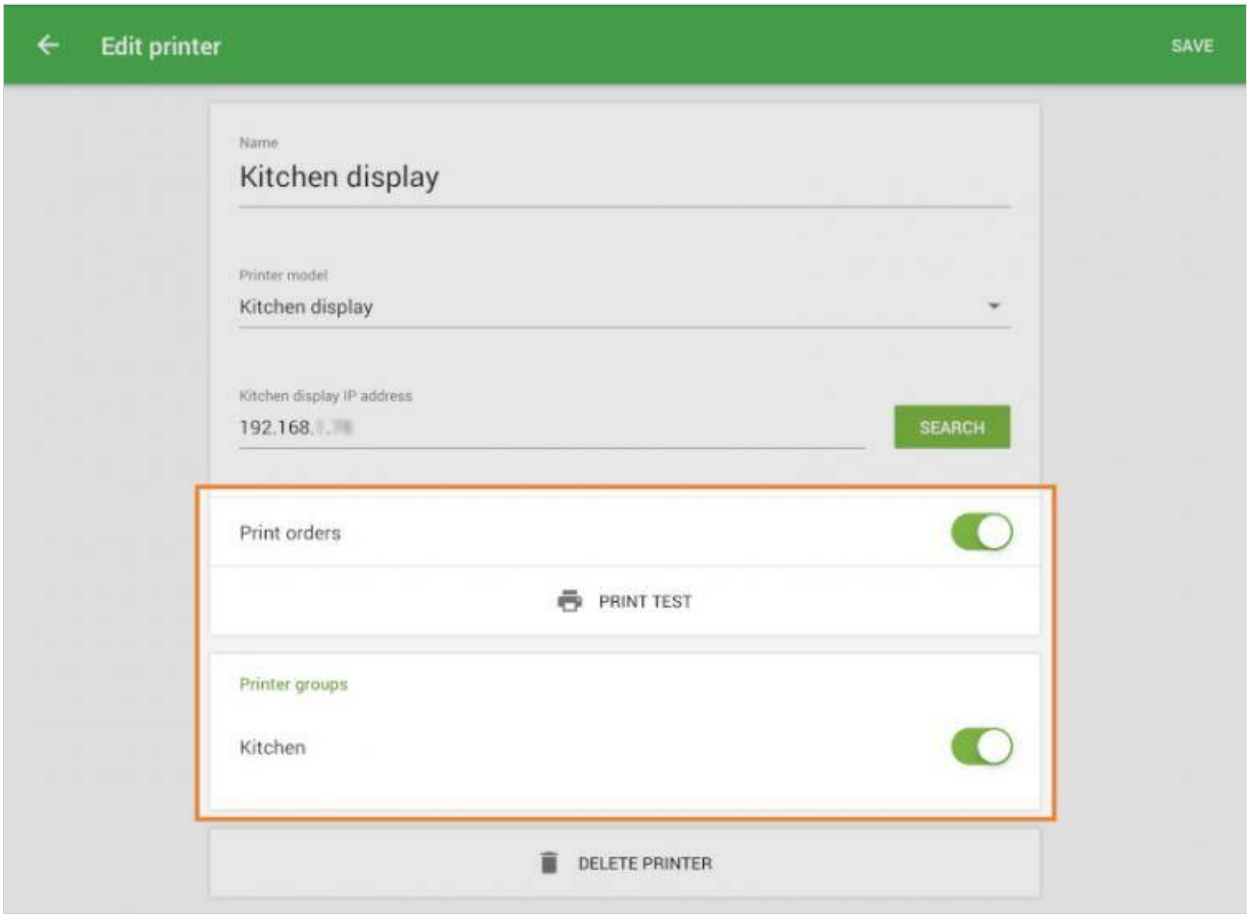
Select the appropriate kitchen display from the list of discovered devices and click OK.



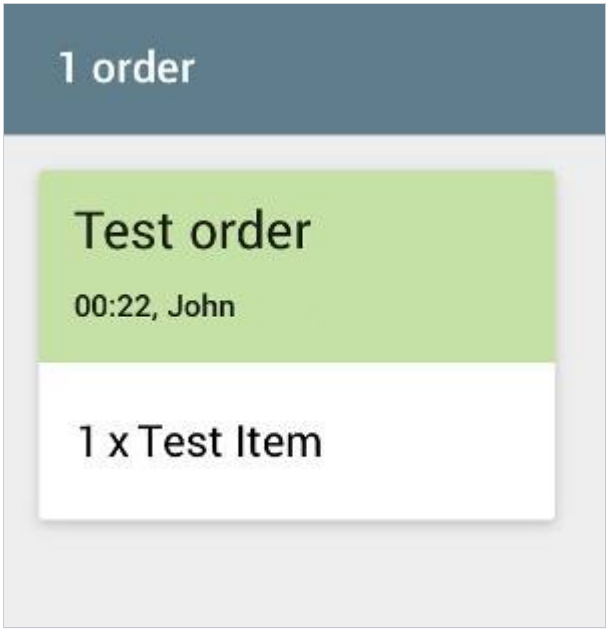
If automatic discovery fails, you can manually enter the IP address of the kitchen display device and proceed to the next step without tapping the 'Search' button.



Then switch ‘Print orders’ on, select a printer group, and tap the ‘Print test’ button.



If you see a test order appear on the kitchen display, you have configured Loyverse KDS correctly.



Save your settings and enjoy!

If no test order appears, re-check the device network settings or chat with our support team.

See also:

Troubleshooting When Working with KDS

How to Use Loyverse KDS Kitchen Display

Using Kitchen Printers with Loyverse POS

Which tablet is the most popular among Loyverse KDS users?

Troubleshooting When Working with KDS

Video
https://www.youtube.com/watch?v=4vyuA_jAjBA

1. Separate Router

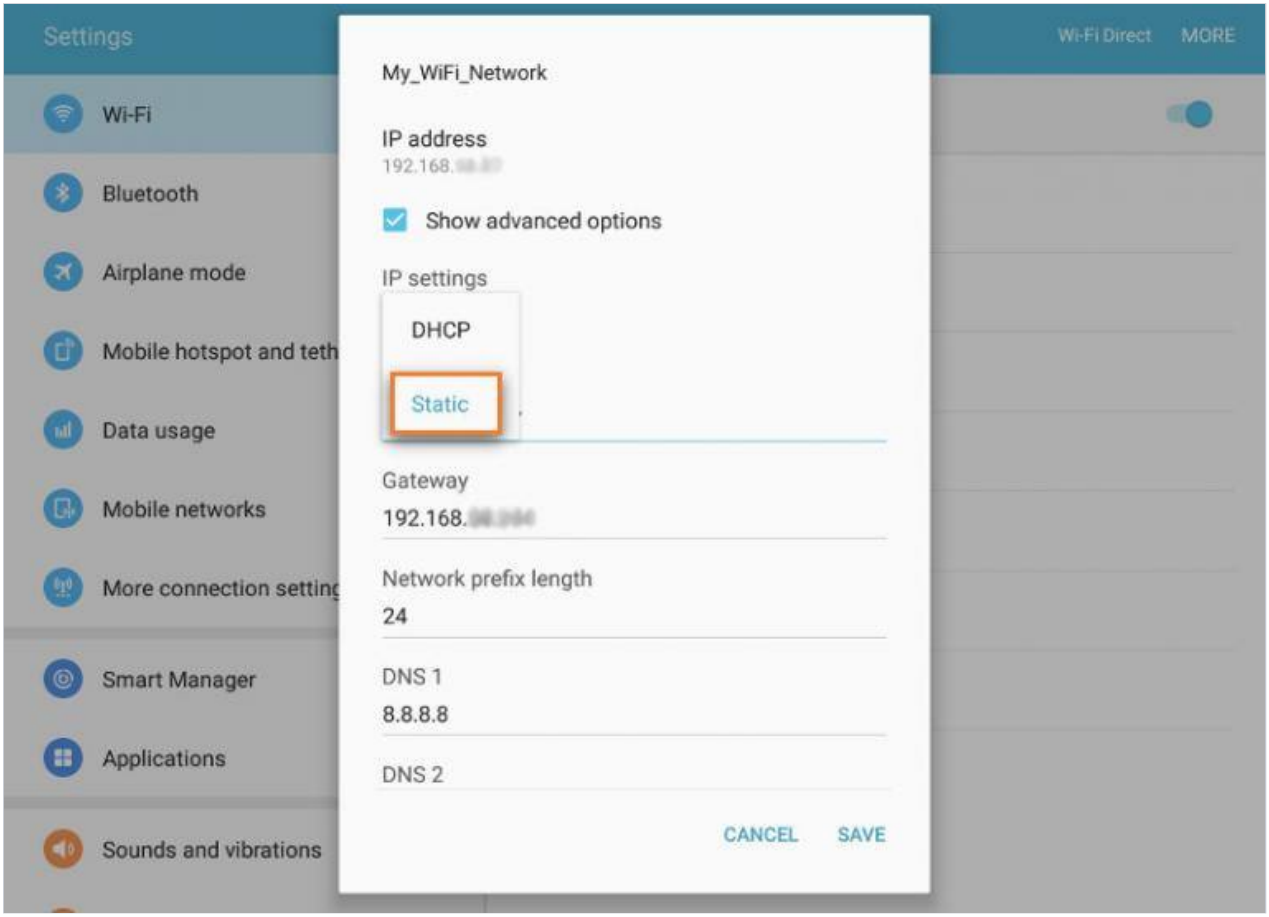
Often problems of losing the connection between Loyverse POS and KDS appear when there are many other Wi-Fi connections to the same Wi-Fi router.
We recommend having separate router with Wi-Fi connection only to the mobile device with Loyverse POS App and mobile devices with KDS App.

If the problem continues or you cannot have a separate router, go to the next step.

2. Assign a static IP address to the kitchen display tablet

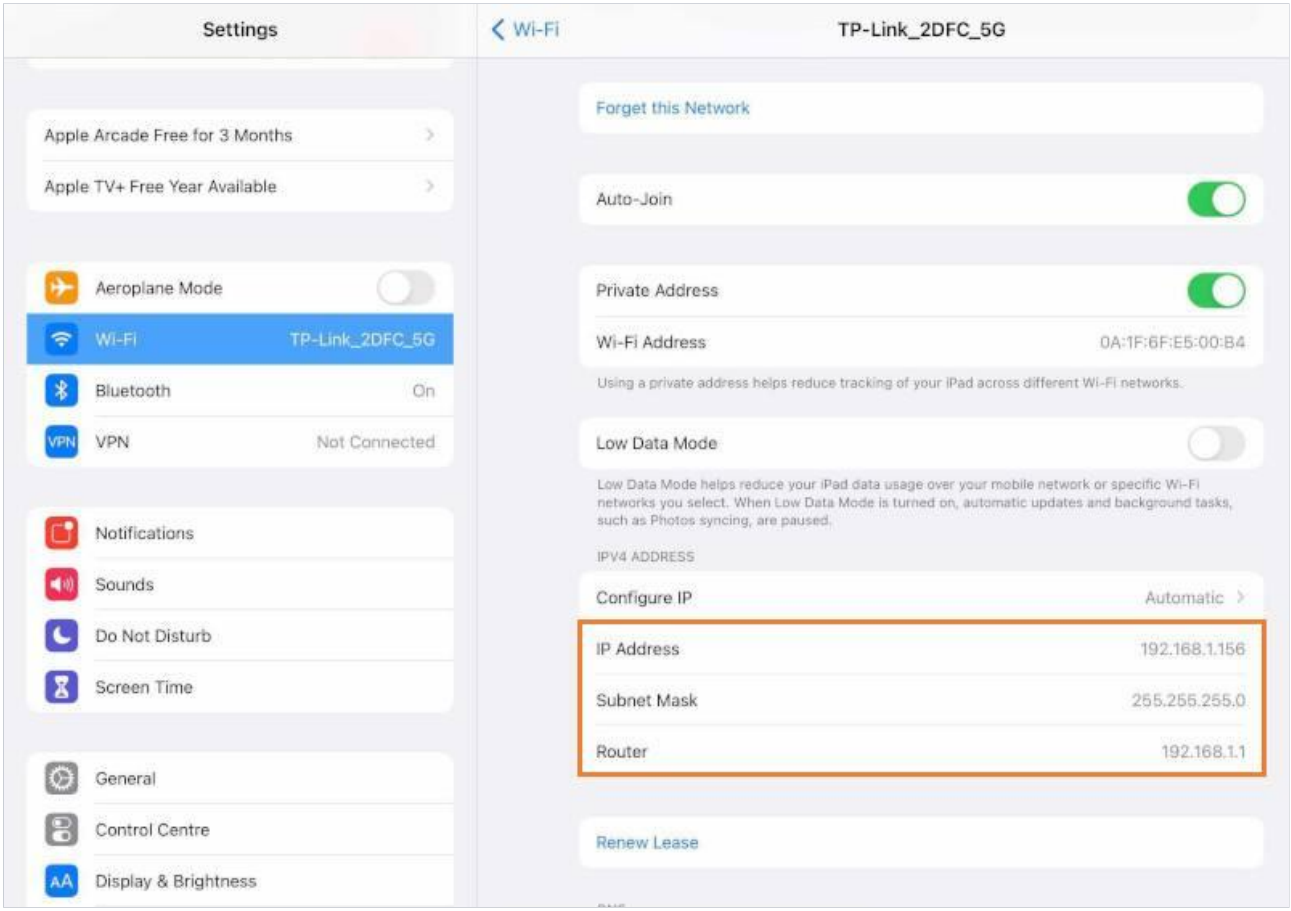
Connect your device to the same WiFi network as the device with Loyverse POS is connected to, and make sure the connection is working. Then change your network settings from DHCP (automatic) to static (manual).

On an **Android tablet**, go to Settings > WiFi, tap and hold the active network, then tap 'Manage network settings'. Tap 'Show advanced options' and scroll down to IP settings, then change 'DHCP' to 'Static'. Tap 'Save'.



On an **iPad**, go to Settings > WiFi.

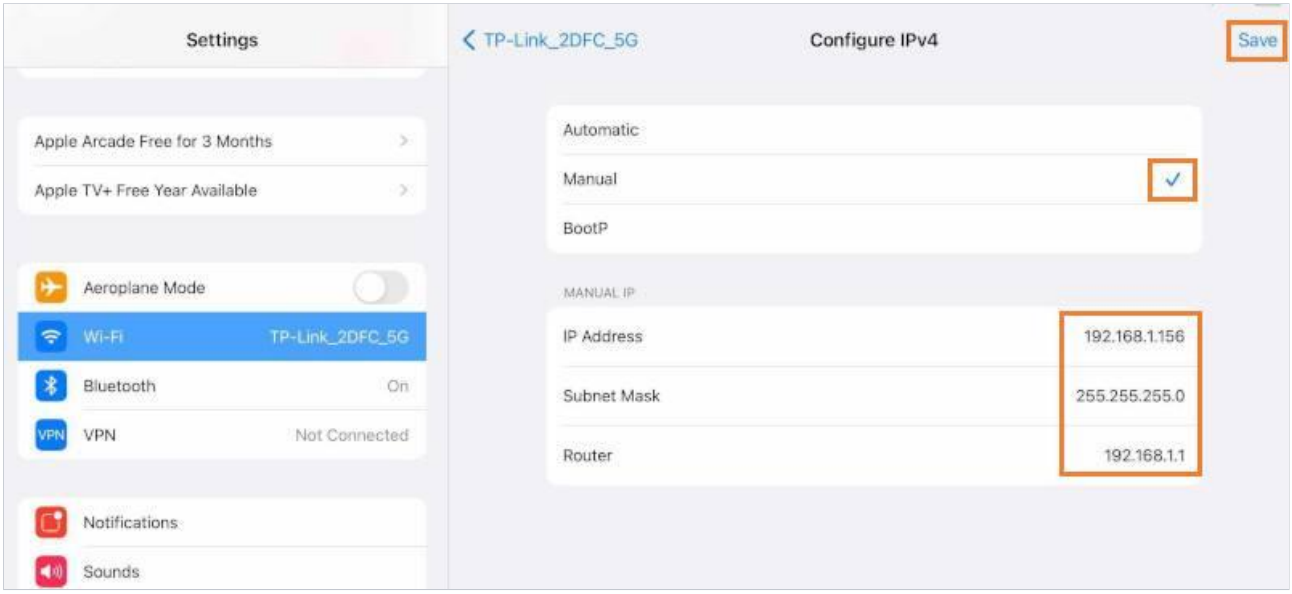
Write down the IP address, Subnet mask, and Router values that are in Automatic IP configuration mode.



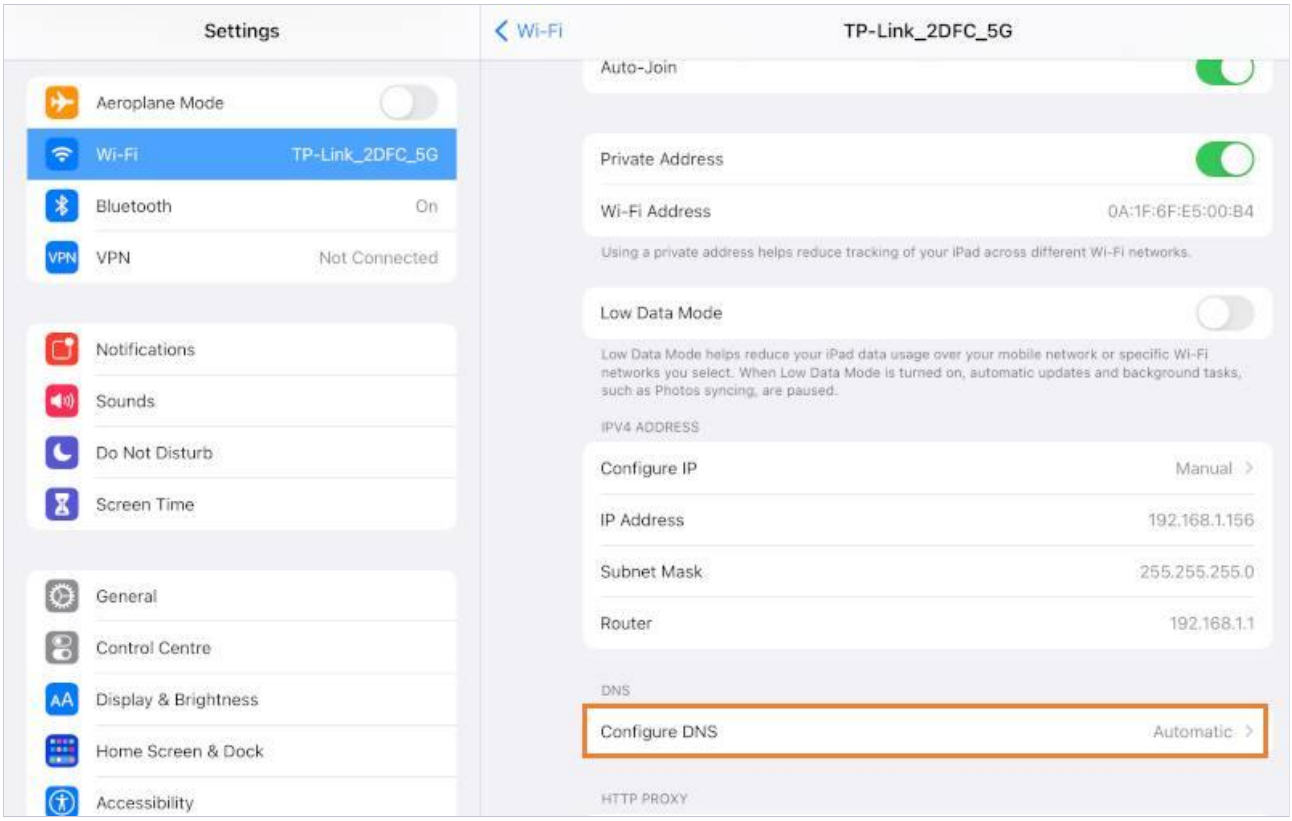
Then click on the Automatic button.



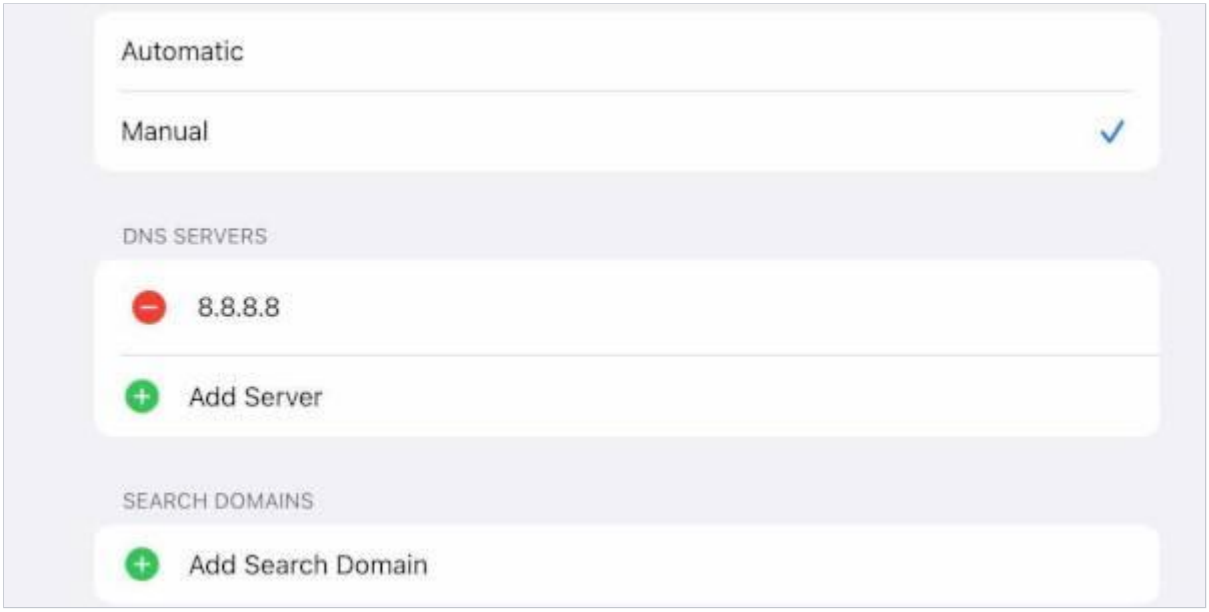
Switch the configuration mode to the Manual and enter values from Automatic IP configuration into respective fields. Then, tap the ‘Save’ button.



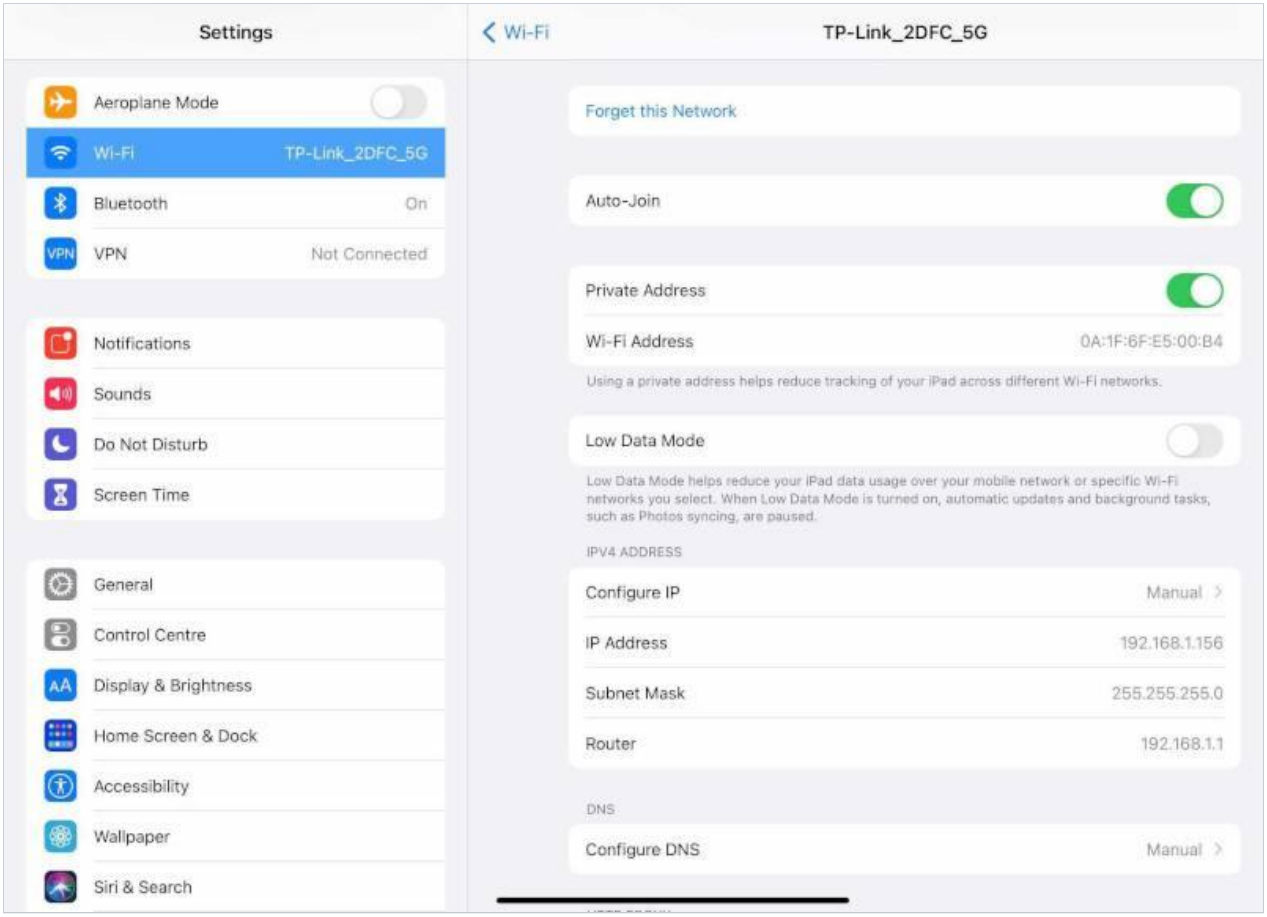
In the same way, switch the DNS settings from automatic to manual mode.



And add the DNS server value. For example, you can use the value 8.8.8.8 for Google OpenDNS.



Now you have set your iOS to work in the static IP address mode.



See also:

[Kitchen Display System Configuration Guide]

[Which tablet is the most popular among Loyverse KDS users?]

Payments

Basics

How to Add Tips to Payments Made through Card Readers

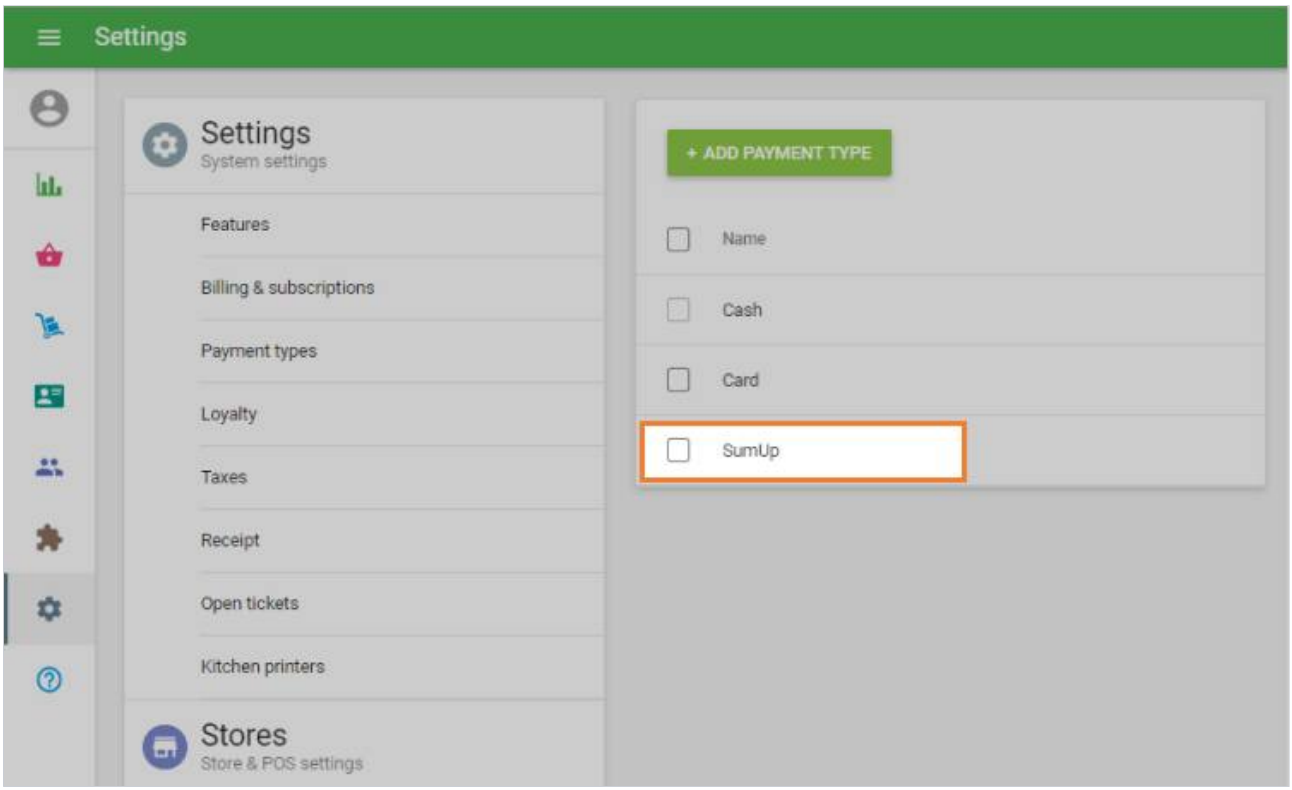
For some of the card processing systems integrated with Loyverse POS, there is the possibility to set up tips that the customers can add to the payments.

Currently, this functionality is available for SumUp, PayPal Zettle, Yoco, and KICC card readers. (For Yoco and KICC card readers currently only for iOS devices).

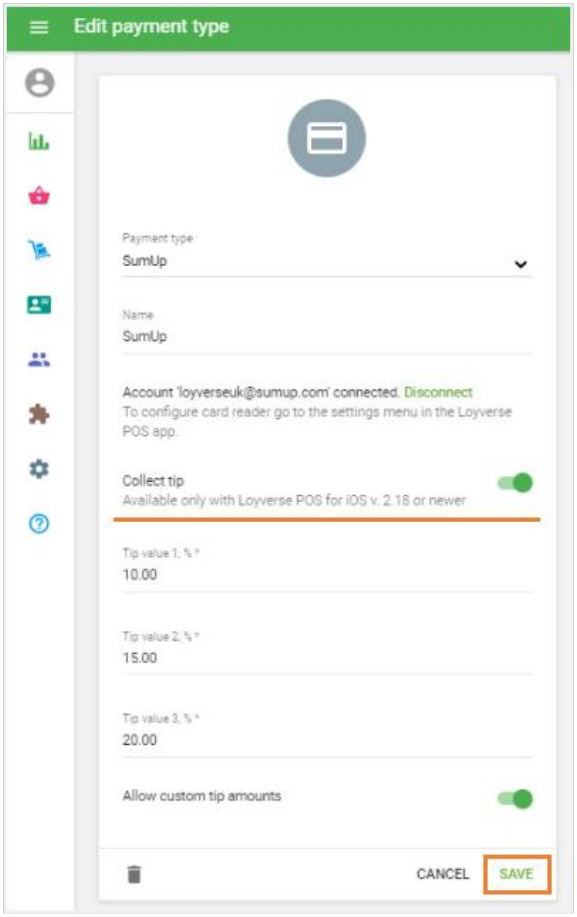
Setting up tips in the Back Office

You can configure the tips that will be displayed on the POS when you choose this payment method.

To do this, go to the Settings menu in the Back Office, click 'Payment Types' and then click on the desired card payment type.



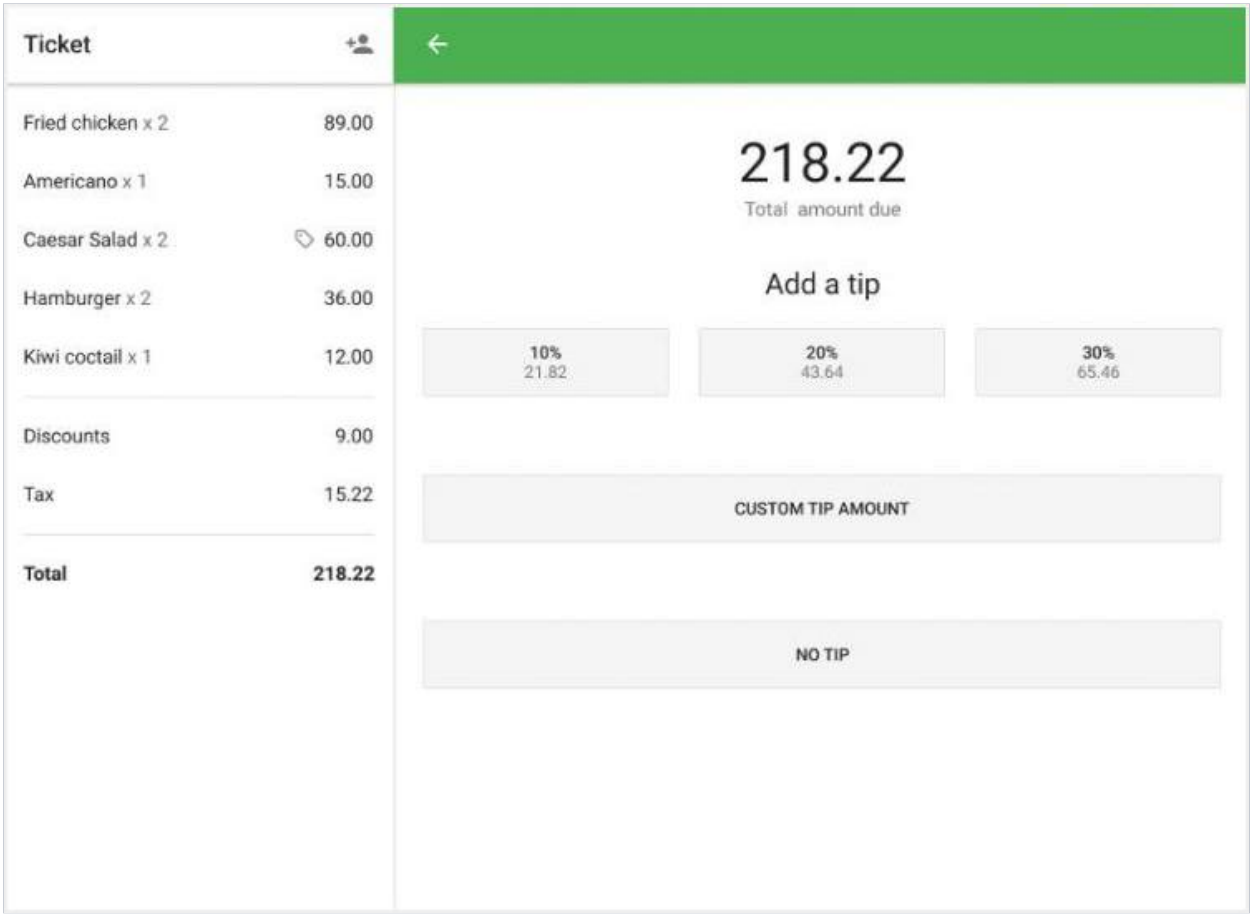
Turn on the selector 'Collect tip'. Enter the predefined percentage values of tips.
You can also enable the option 'Allow custom tip amounts' that allows customers to choose a tip amount other than the predefined percentage values.



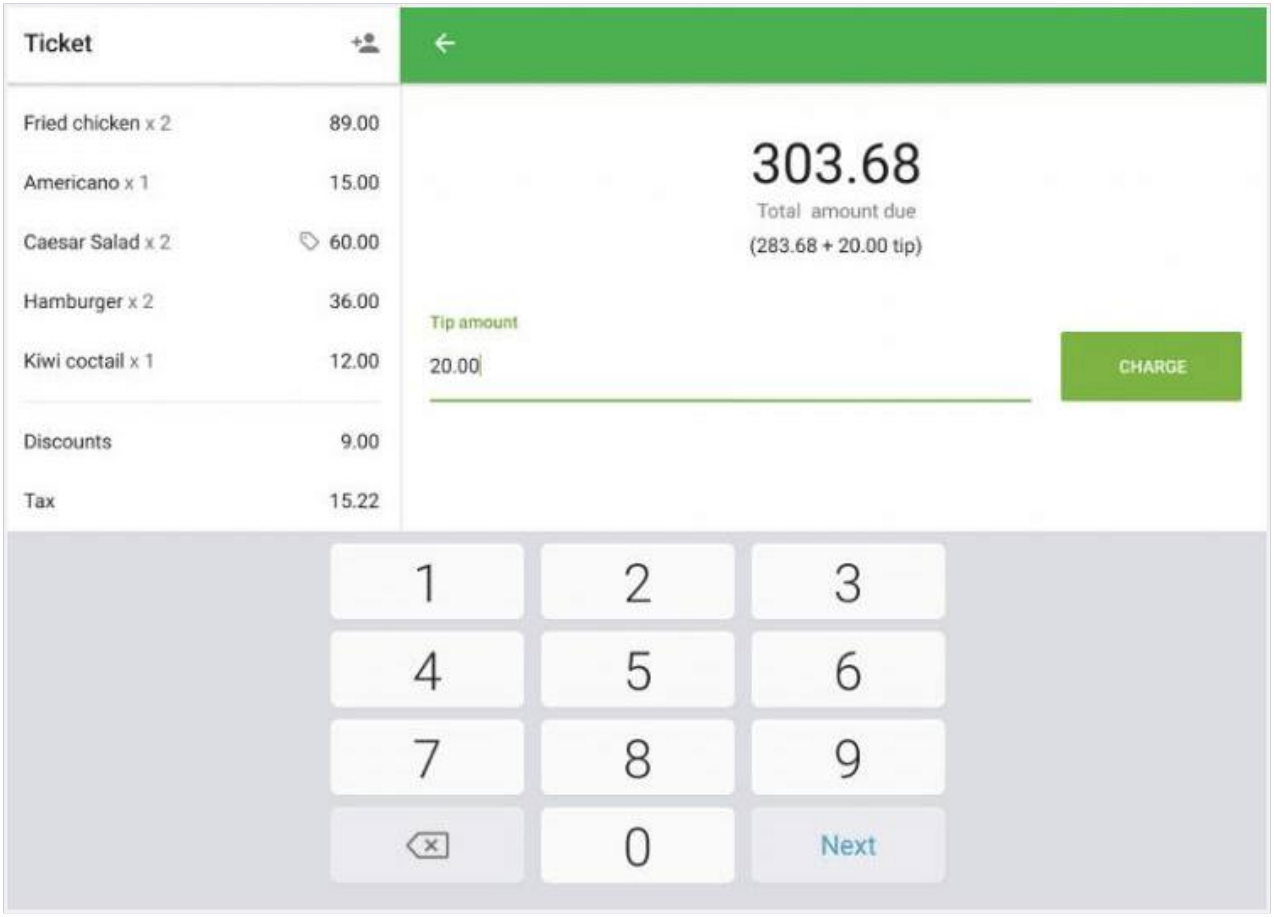
Save your changes when done.

Selecting Tips during Payments

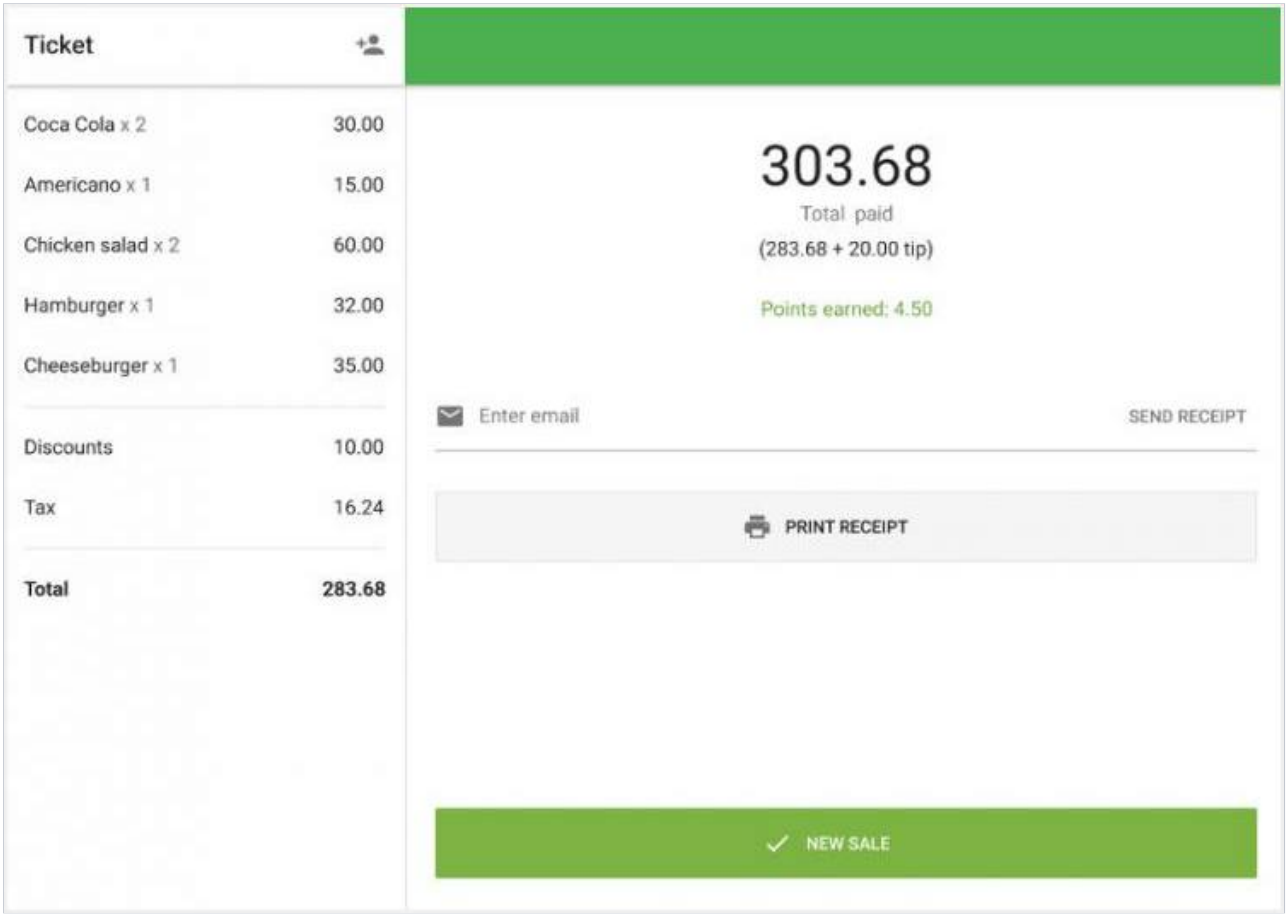
At the POS after selecting the card payment type, you will see the tips selection screen. The cashier can select the tip amount desired by the customer by selecting one of the predefined tip amounts in percentage (its actual value will be shown below the percentage).



If the ‘Custom tip amount’ is selected, the cashier can enter the tip value. Tap the ‘Charge’ button to continue payments through the card reader.

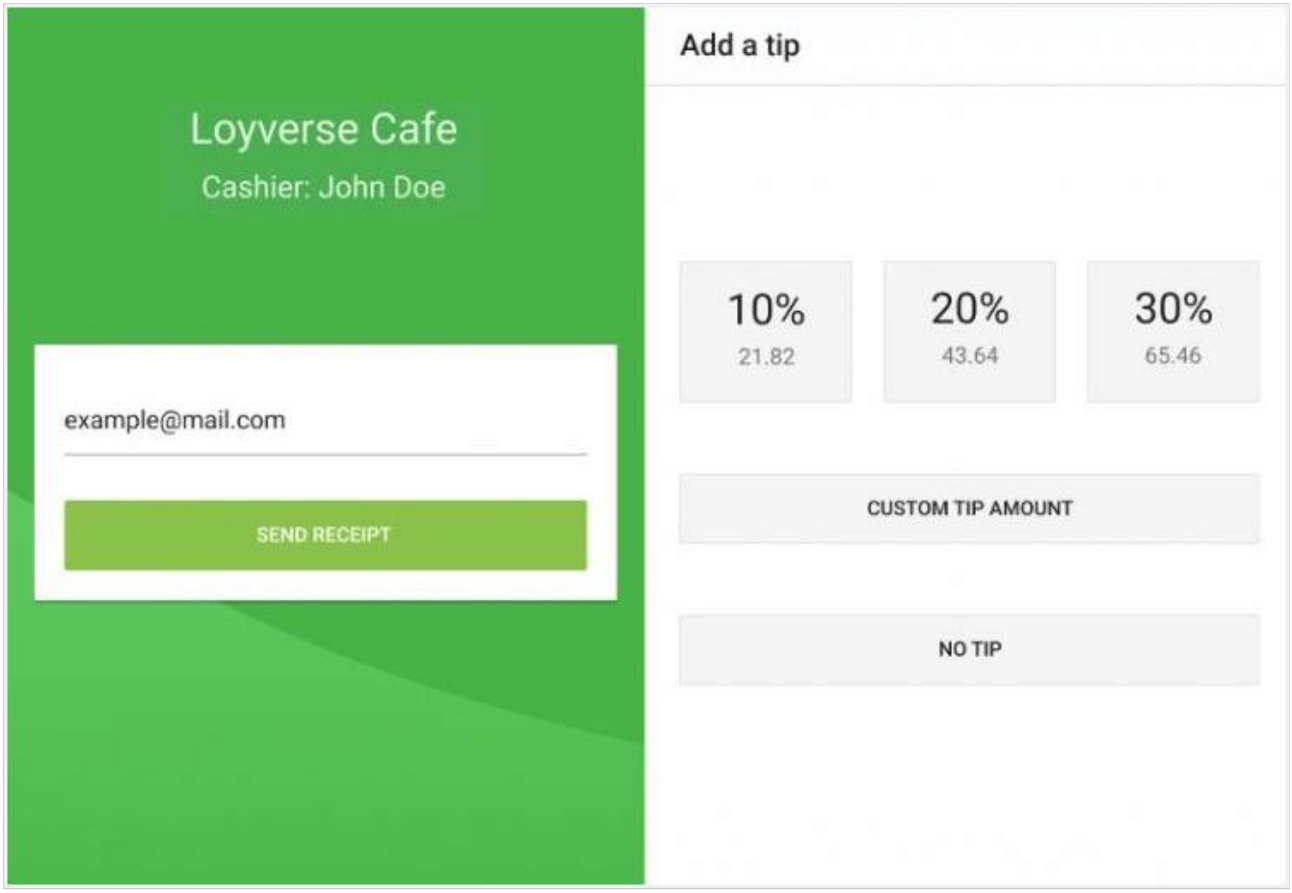


After finishing the transaction, on the final screen, you will see the total amount paid with the receipt total and the tip value under it in parentheses. Tap the ‘New sale’ button to finish the sale.

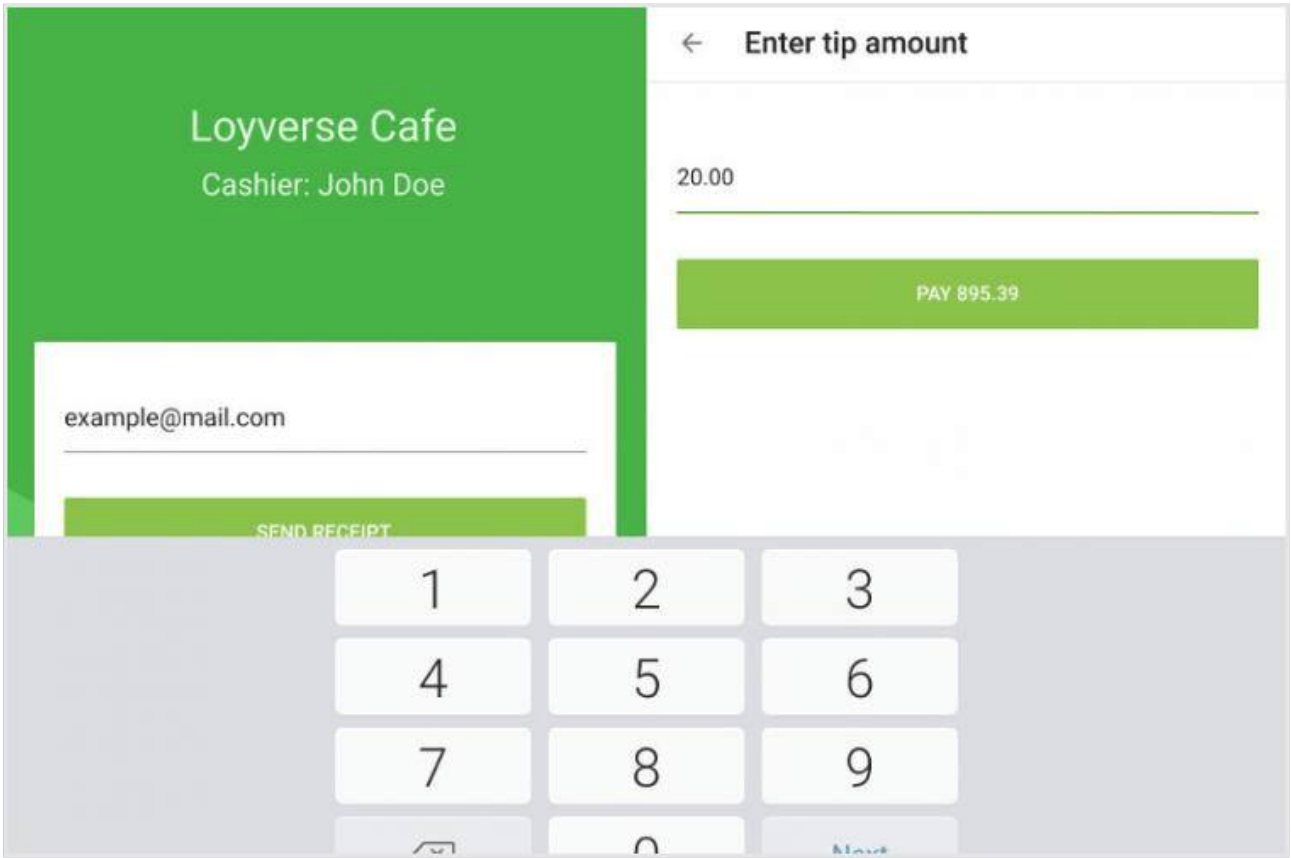


Tips on the customer display

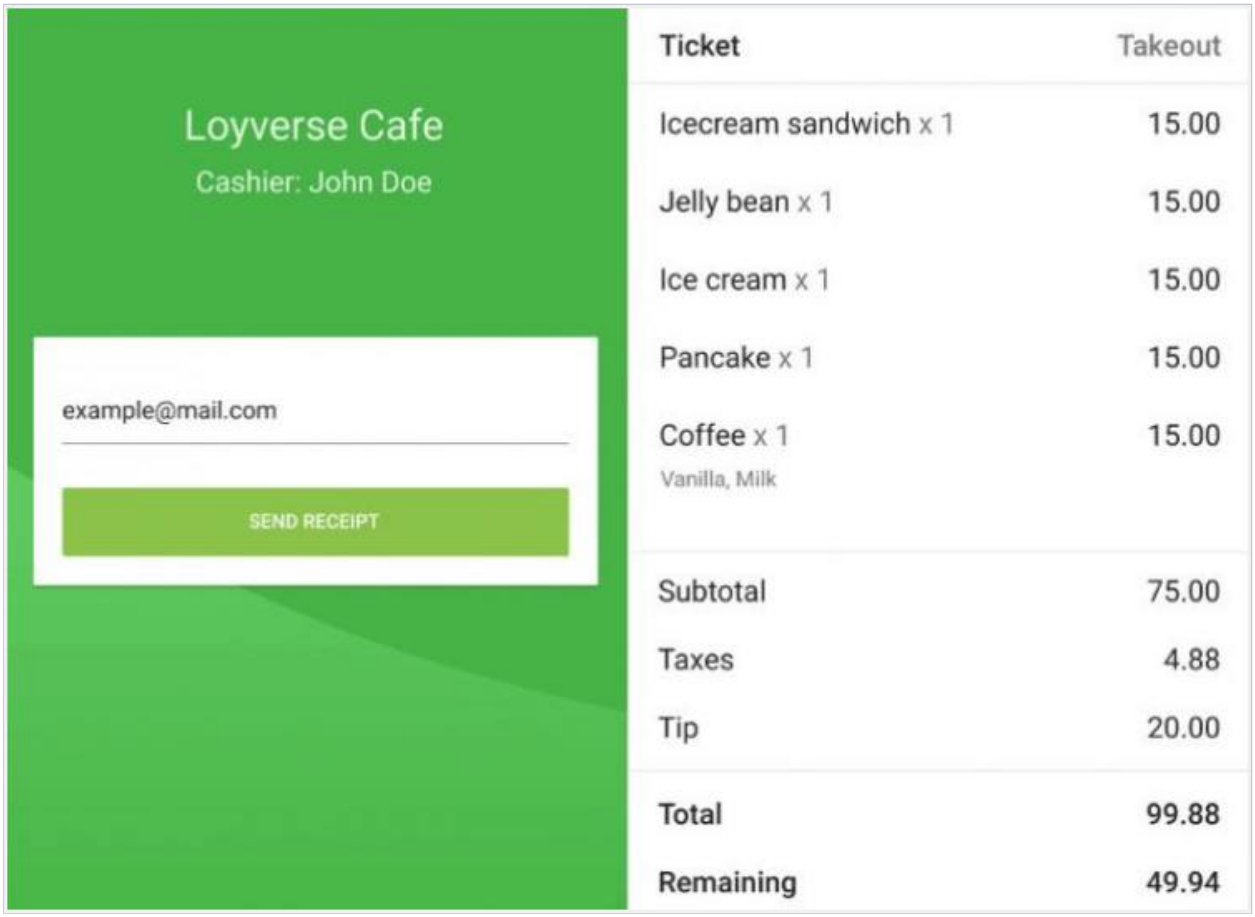
If you have a customer display (CDS) connected to your POS, the customer will be able to choose the tips from the predefined percentage values or enter a custom amount on the screen.



If a customer selects the custom tip amount, he/she can enter the amount and then tap the ‘Pay’ button to continue the payment through the card reader.

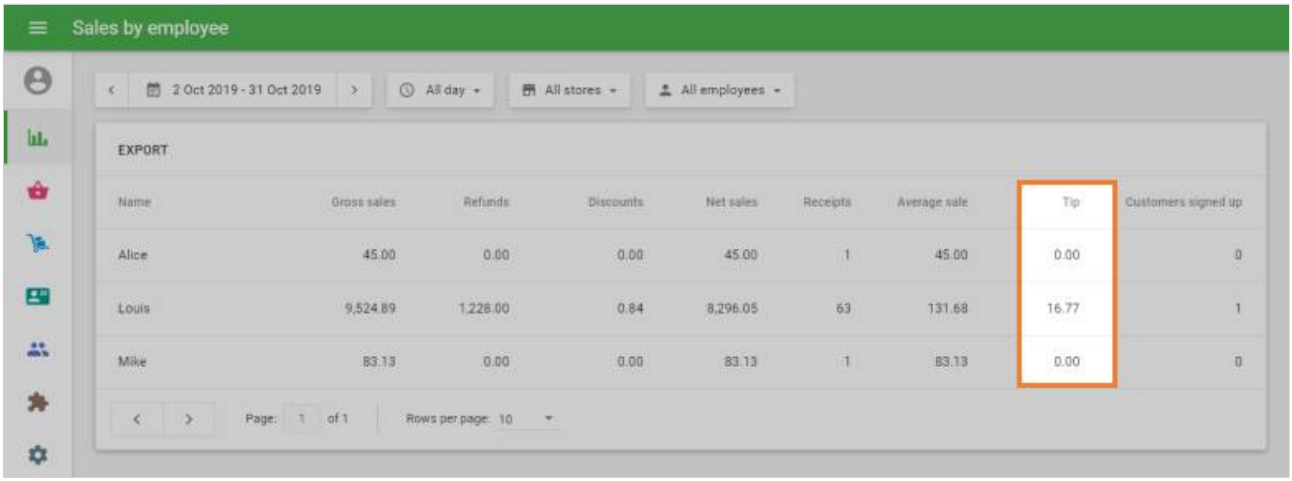


After finishing the transaction, the receipt information with tips will be shown.



Tips at Reports

You can also see the total amount of tips per employee in the Sales by Employee Reports in the Back Office.



Also, tips will be shown in the exported files of Receipts and Payment types and also in the Shift report on POS.

See also:

[How to Accept Credit Cards with Loyverse POS and SumUp]

Loyverse Payments

How to Activate Loyverse Payments

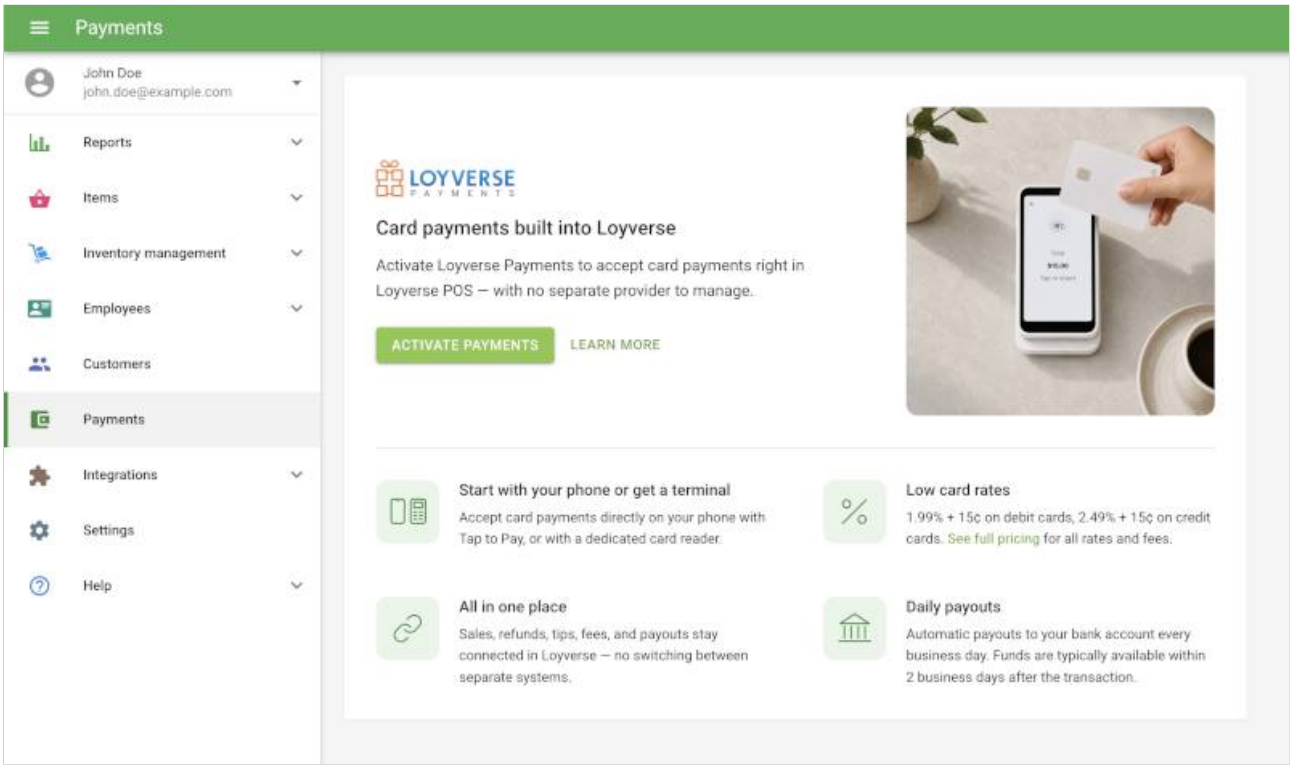
Loyverse Payments allows merchants using Loyverse POS to accept credit and debit card payments via a **payment terminal** or through **Tap to Pay** on a smartphone.

Note: Loyverse Payments is currently available only in the **USA, Switzerland, and Belgium**.

1. Activating Loyverse Payments on Your Account

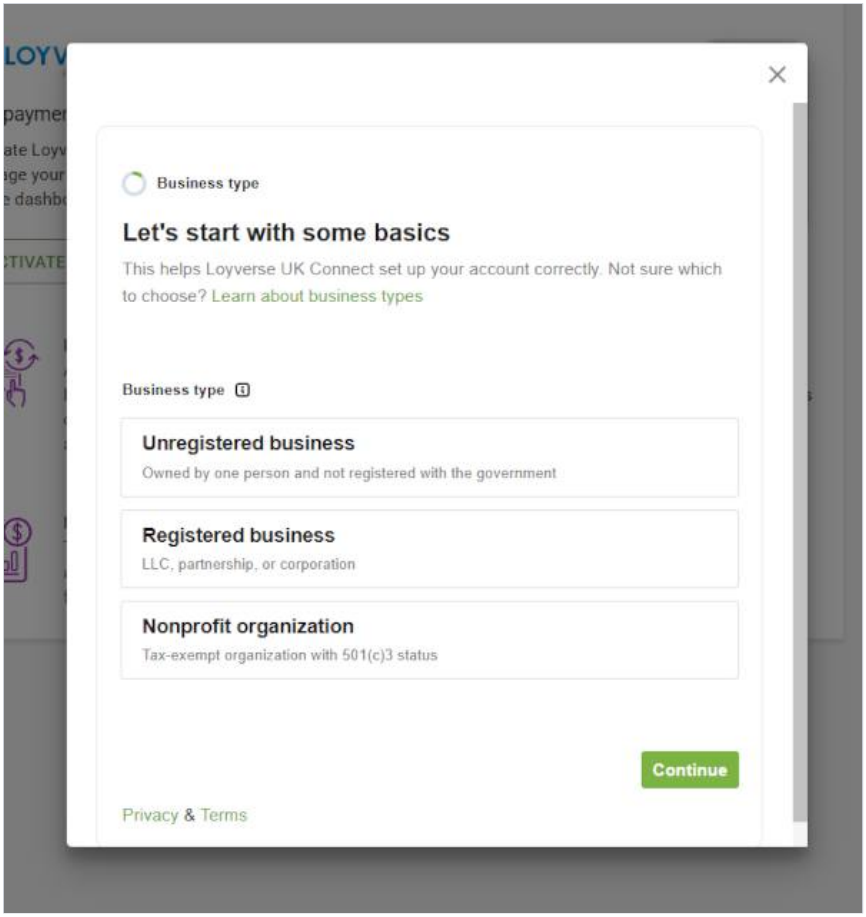
Log in to your **Back Office**.

Go to **Payments**.



Click **Activate Payments** and complete the onboarding steps:

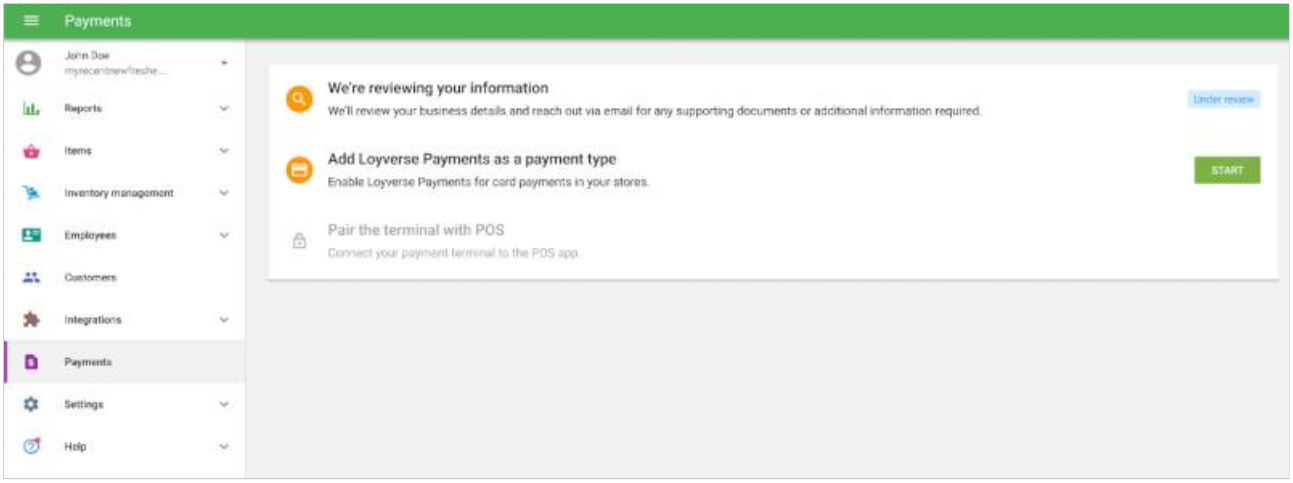
- Select your Business Type: Individual, Company, or Non-Profit, then click **Continue**.



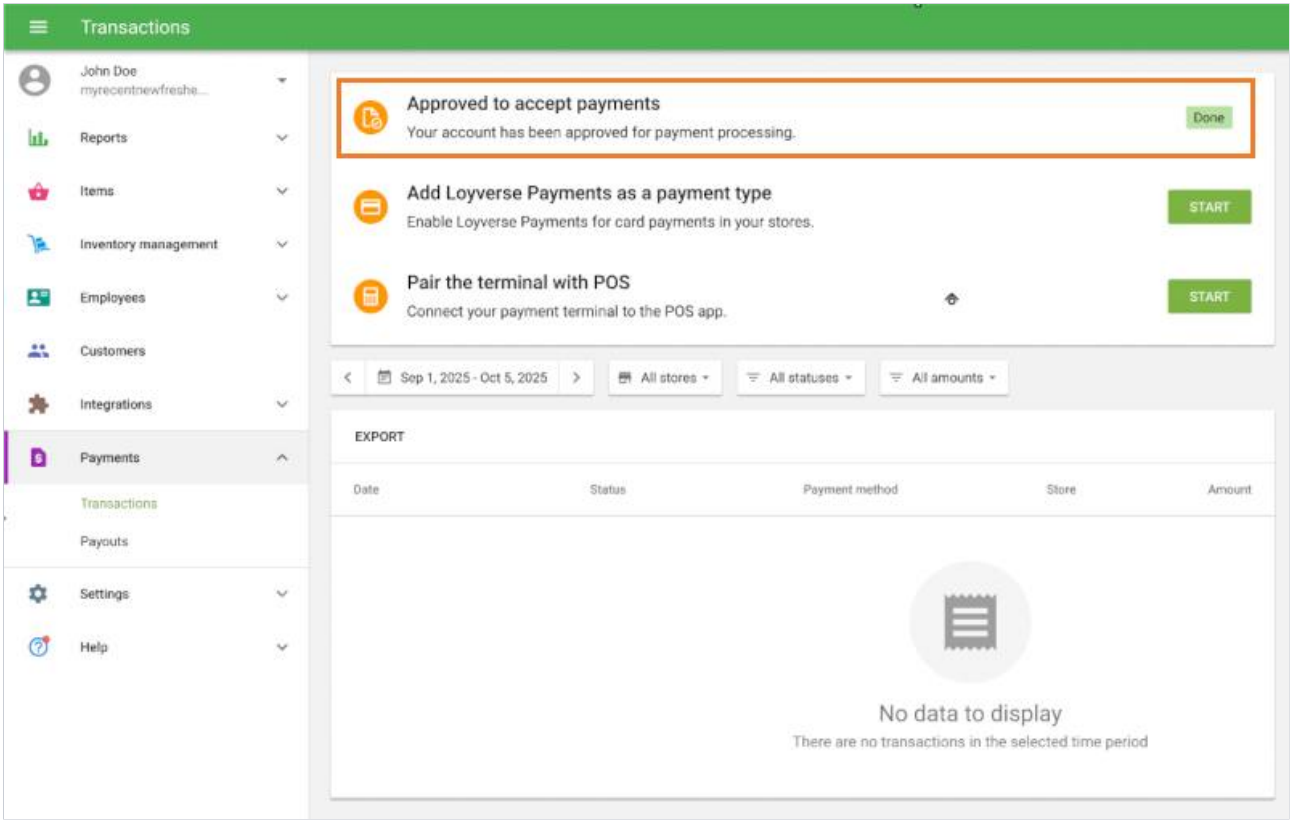
Fill in all required fields and click Continue. Repeat until all steps are complete.

Review your information and click **Submit**.

Your account status will show **Under Review** while your application is being processed.



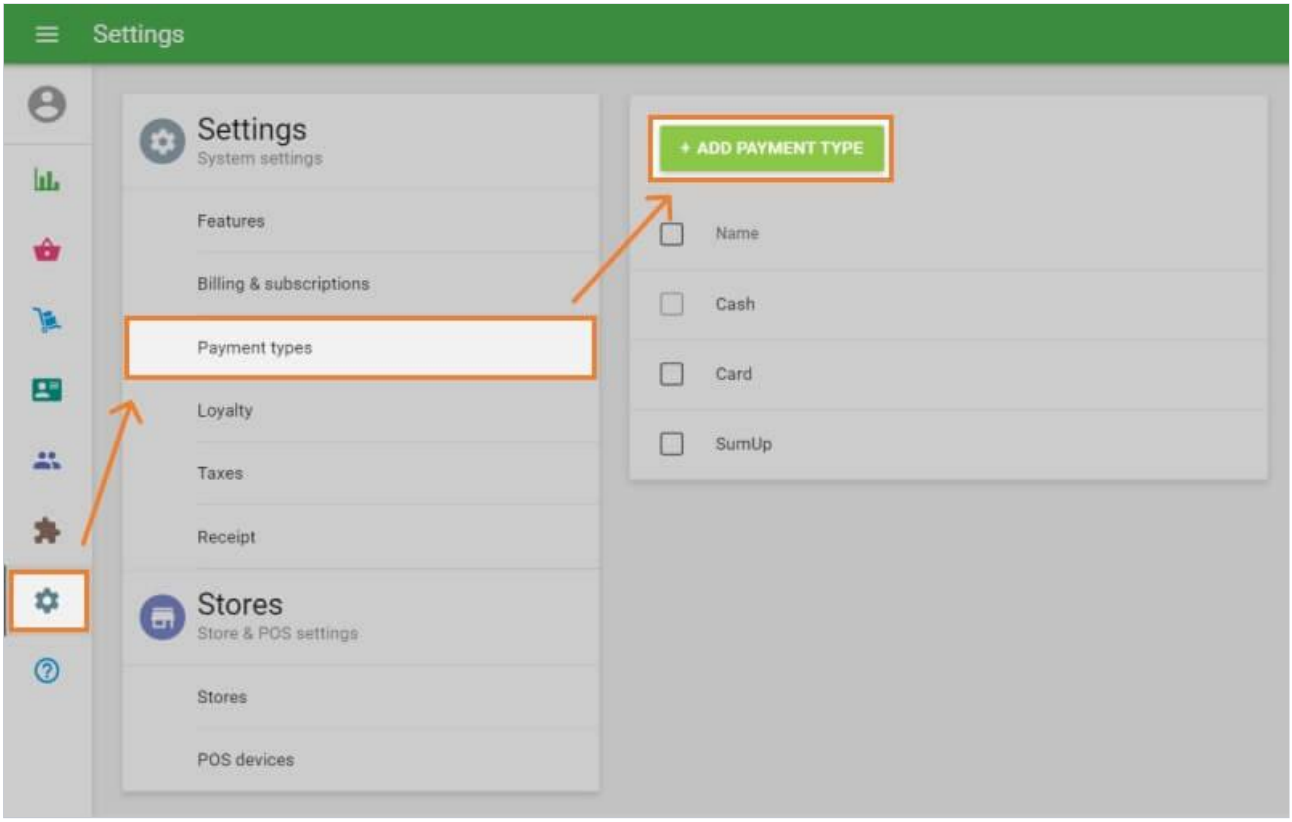
Once your account is approved, you'll see the **Approved to accept payments notice**.



You can then proceed to add Loyverse Payments as a payment type.

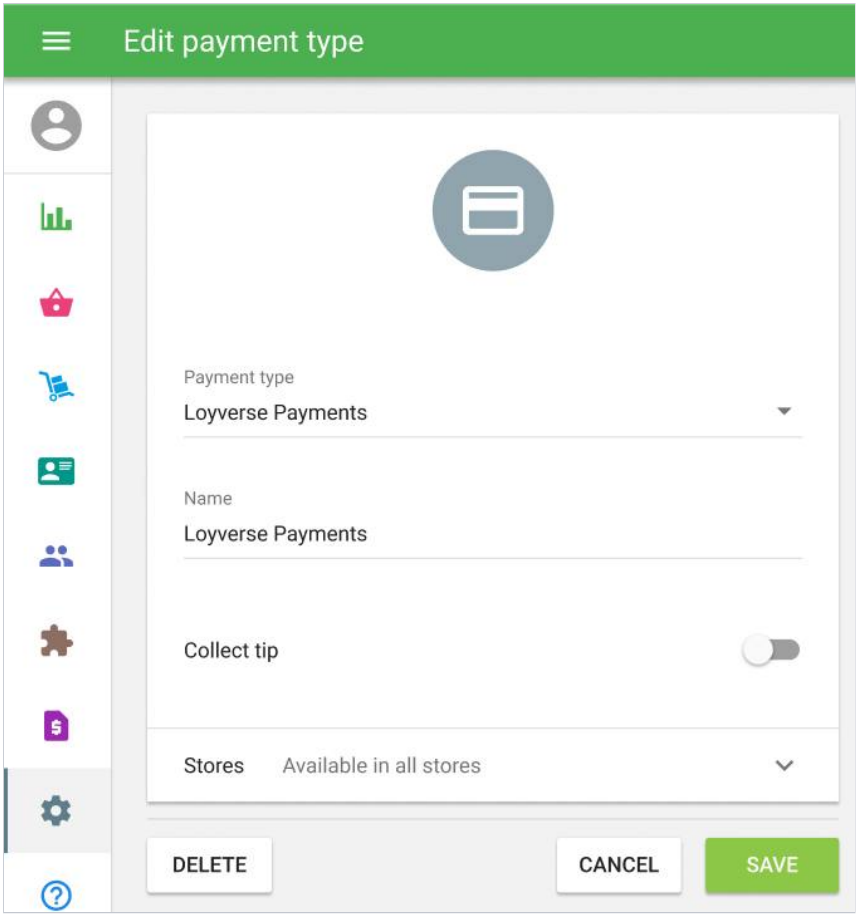
2. Adding Loyverse Payments as a Payment Type

In the Back Office, go to **Settings → Payment Types**.

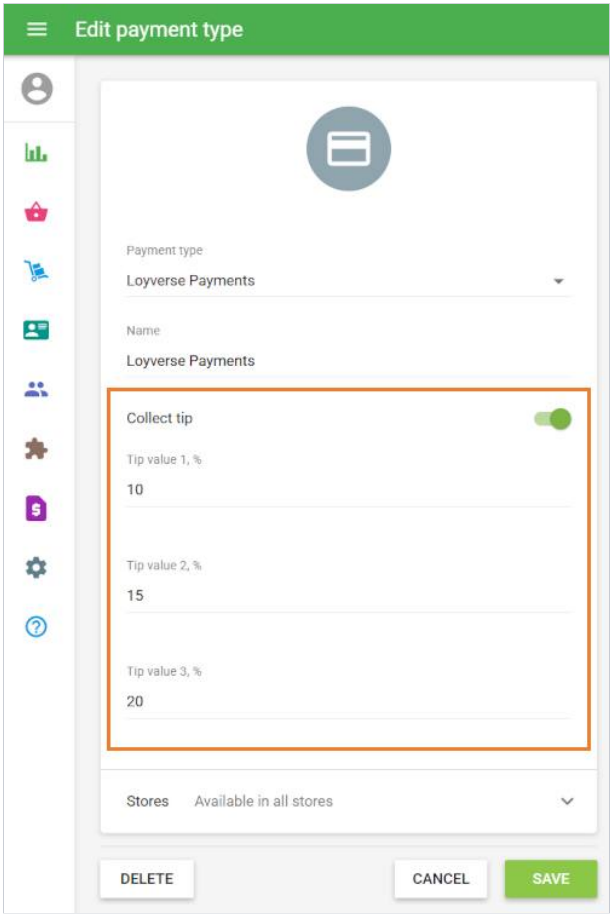


Click **Add Payment Type**.

From the drop-down list, select **Loyverse Payments**.



If you want to collect tips, enable the **Collect Tip** toggle and set your predefined tip percentages.

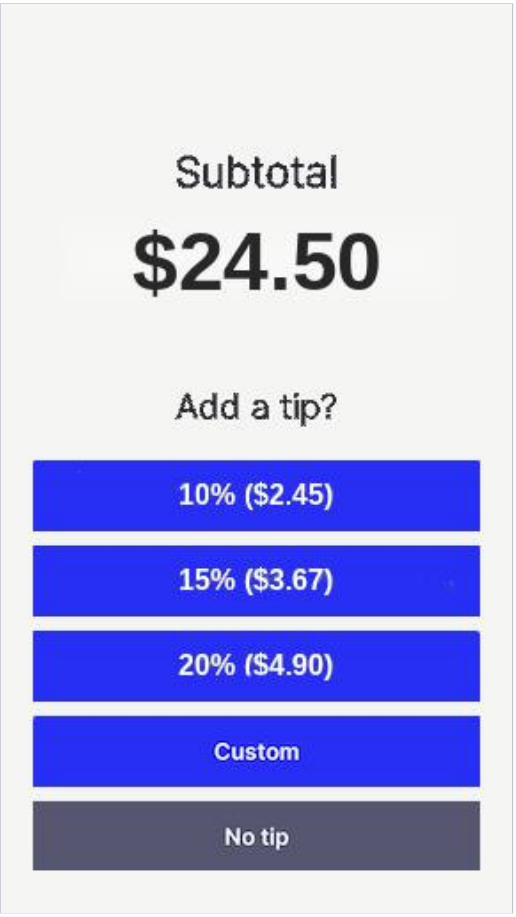


Click Save.

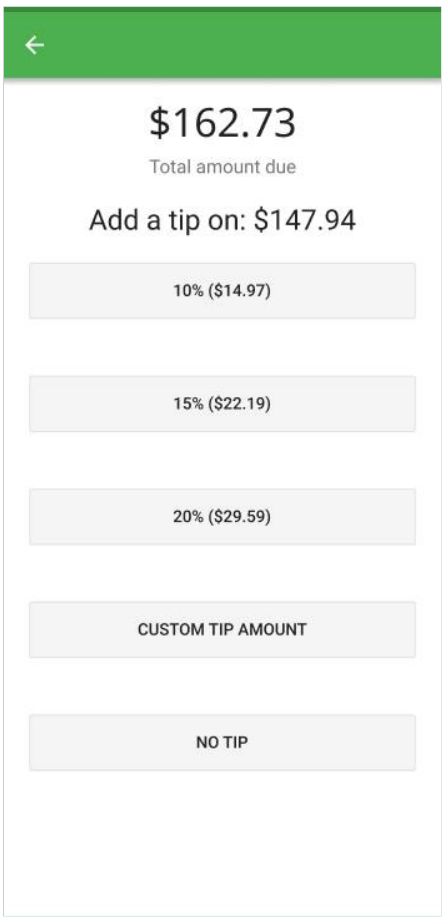
How Tips Work

Once tips are enabled, customers will be prompted to select a tip amount before completing the payment:

- **Payment terminal** — Tip options are displayed on the terminal screen.



- **Tap to Pay** — Tip options are displayed on the POS screen after the customer selects Tap to Pay as the payment method.



See also:

How to Accept Card Payments with Loyverse POS and Loyverse Payments on Bluetooth Card Readers

How to Accept Card Payments with Loyverse POS and Loyverse Payments on Terminal

How to Process Refunds of Sales Made with Loyverse Payments

How to Accept Card Payments with Loyverse POS through Tap to Pay on a Smartphone

How to View Card Transactions of Loyverse Payments and Payouts

How to Accept Card Payments with Loyverse Payments Using a Smart Reader

Loyverse POS merchants can accept credit and debit card payments using a Smart Reader.

Note: This feature is currently available in the **USA**, **Switzerland**, and **Belgium**.

Before You Begin

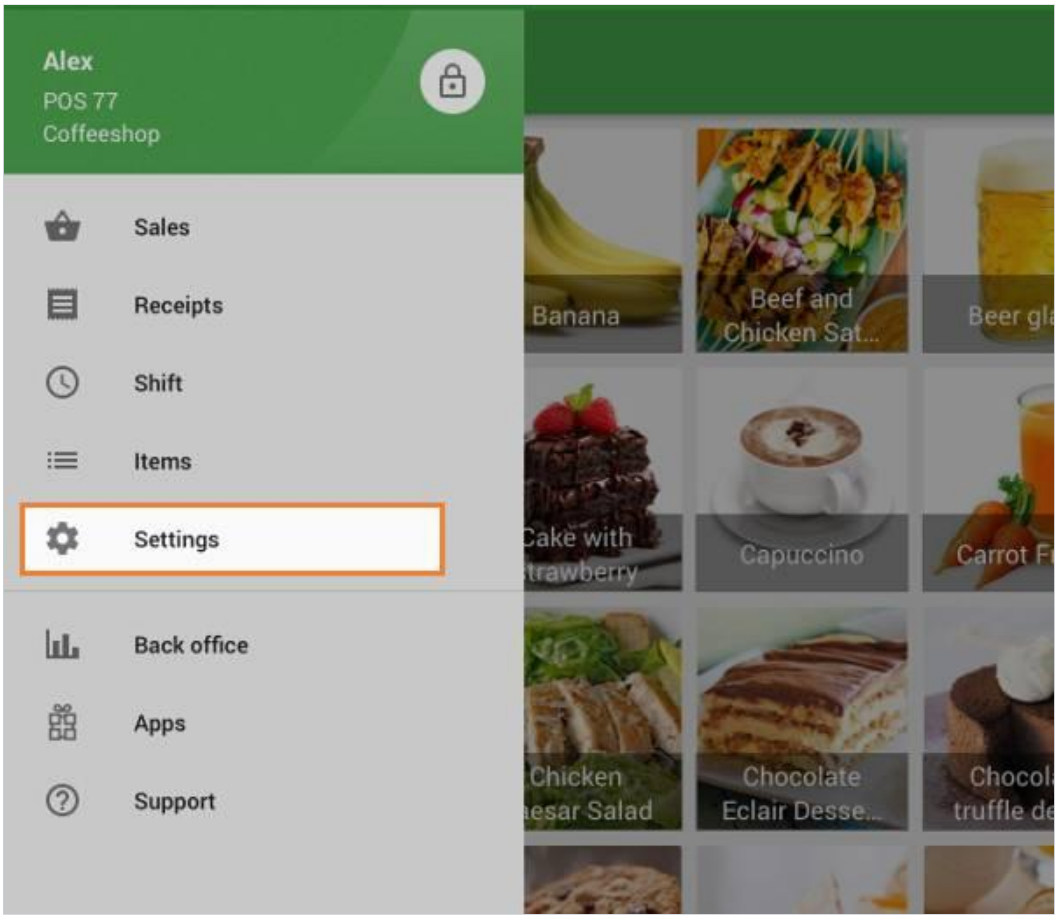
- Loyverse Payments must be activated on your account in the Back Office, and a **Loyverse Payments** payment type must be configured.

- You must have ordered and received your terminal through the Loyverse online store.
- The terminal must be connected to the internet via Wi-Fi before pairing.

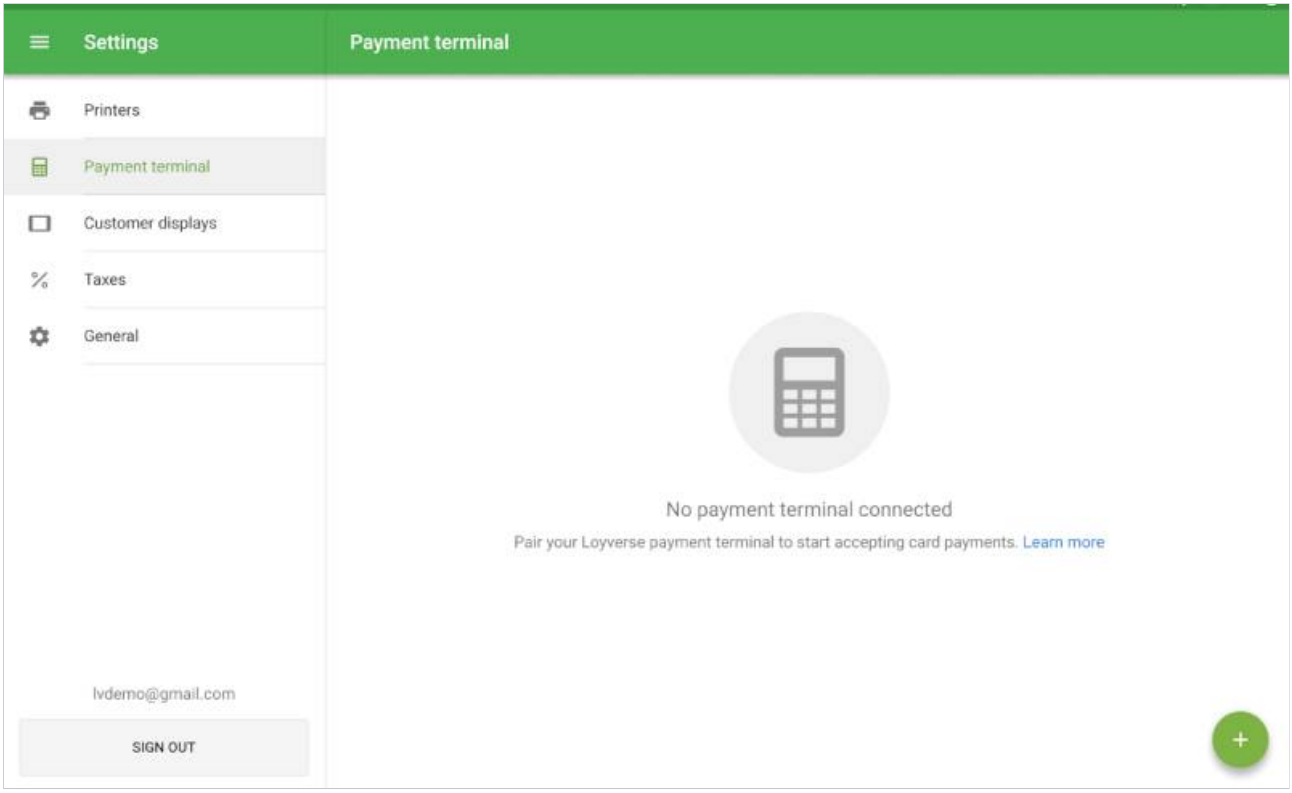
1. Connecting the Terminal to Loyverse POS

Open the **Loyverse POS** app.

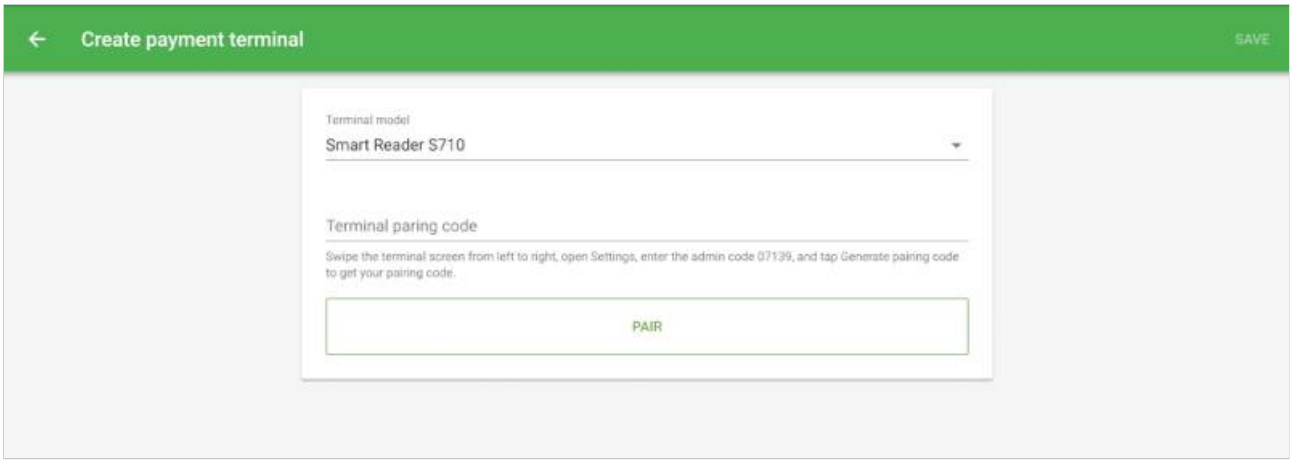
Go to **Settings → Payment Terminal**.



Tap the **+** button to add and pair a new terminal.

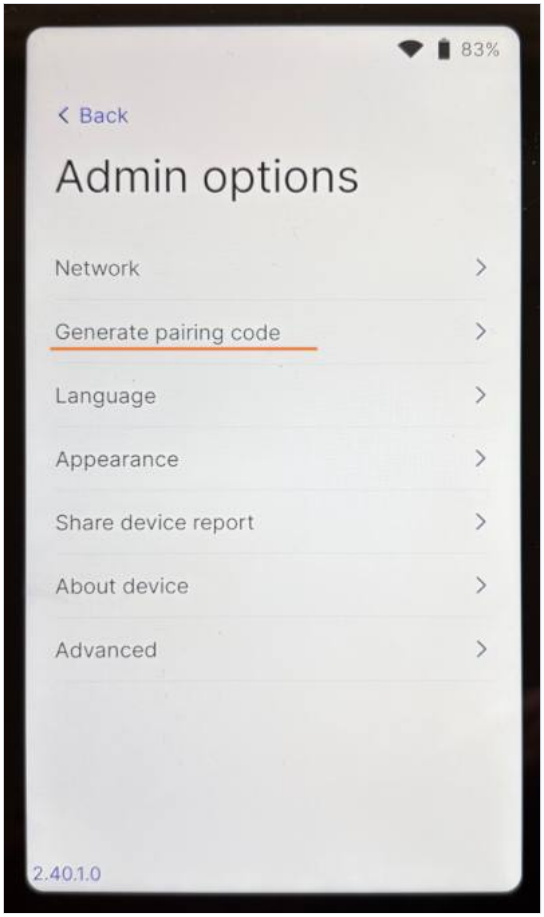


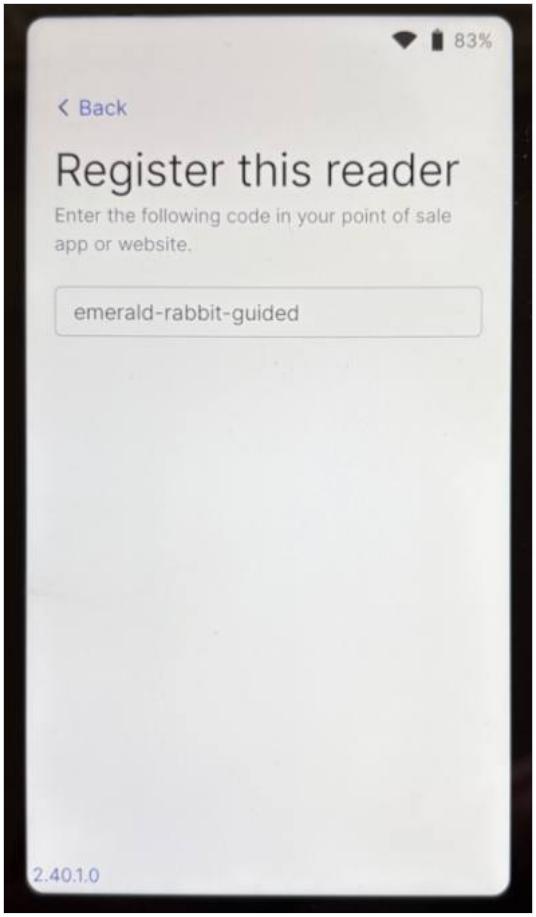
Select the **Terminal model**.



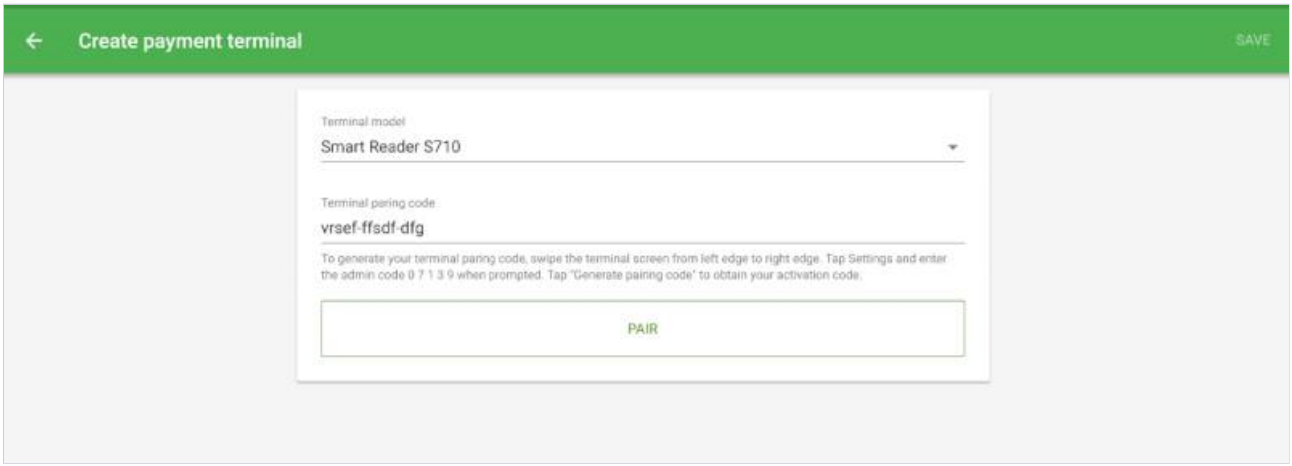
On the terminal, generate a pairing code:

- Swipe the terminal screen from left to right.
- Open **Settings** and enter the admin code **07139**.
- Tap **Generate Pairing Code**.

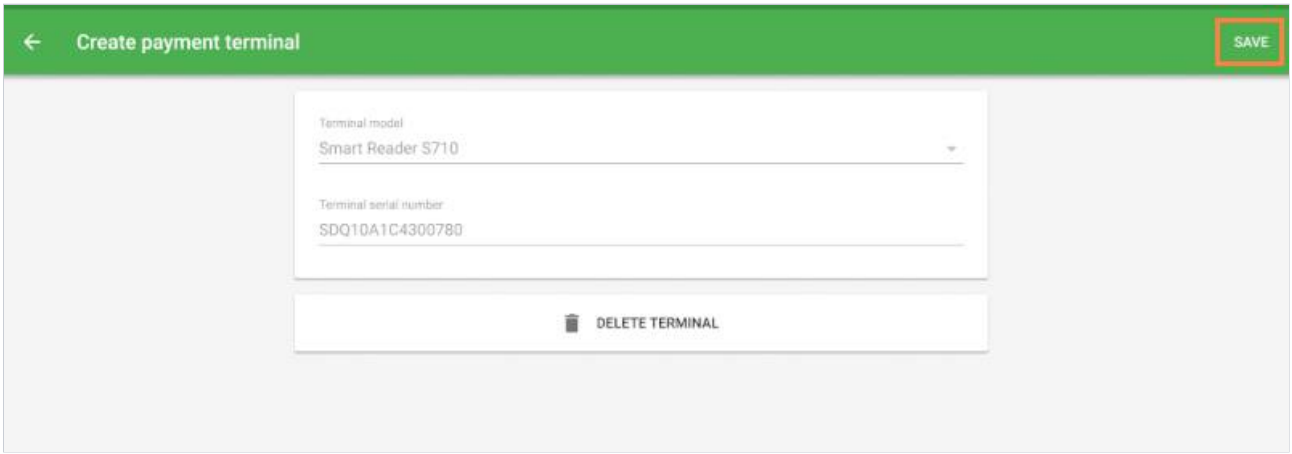

83%
Back
Admin options
Network
Generate pairing code
Language
Appearance
Share device report
About device
Advanced
2.40.1.0


83%
Back
Register this reader
Enter the following code in your point of sale app or website.
emerald-rabbit-guided
2.40.1.0

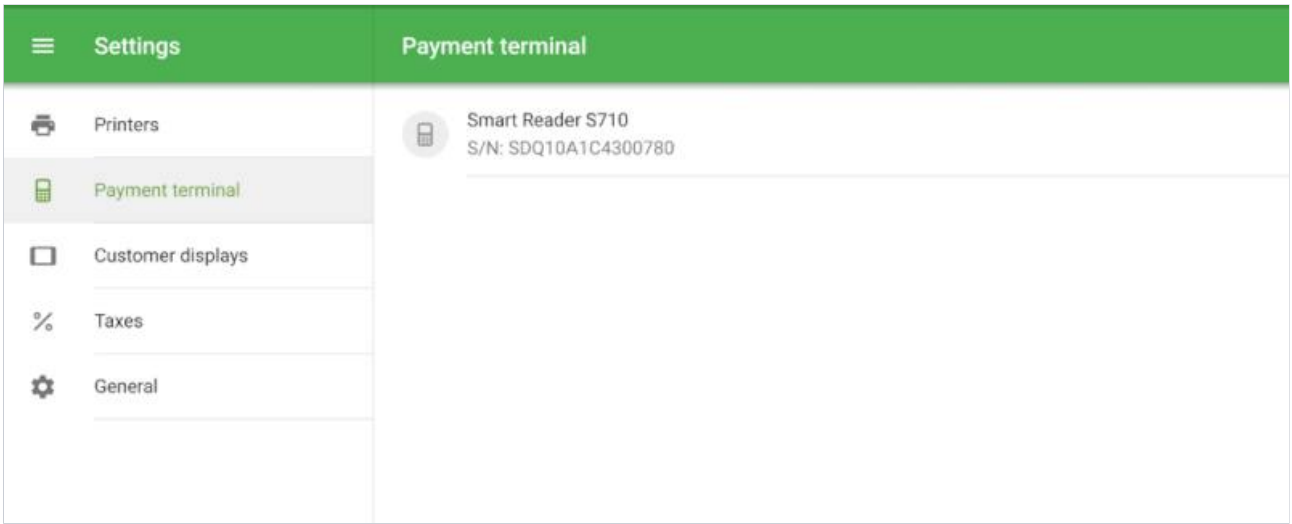
Enter the pairing code into the **Create Payment Terminal** form on the POS and tap **Pair**.



After successful pairing, confirm the terminal model name and tap **Save**.



The paired terminal will appear in the **Payment Terminal** section.

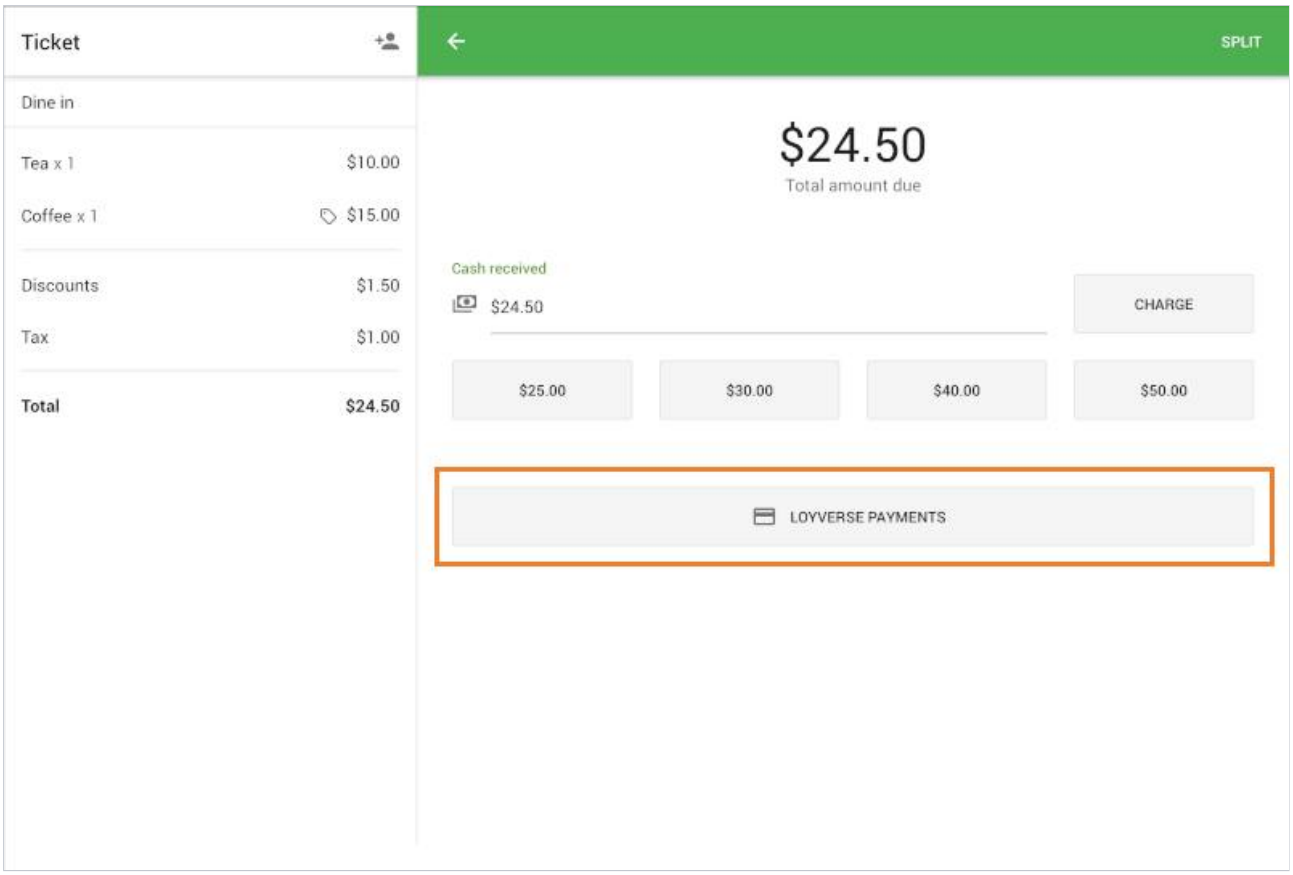


2. Processing a Payment

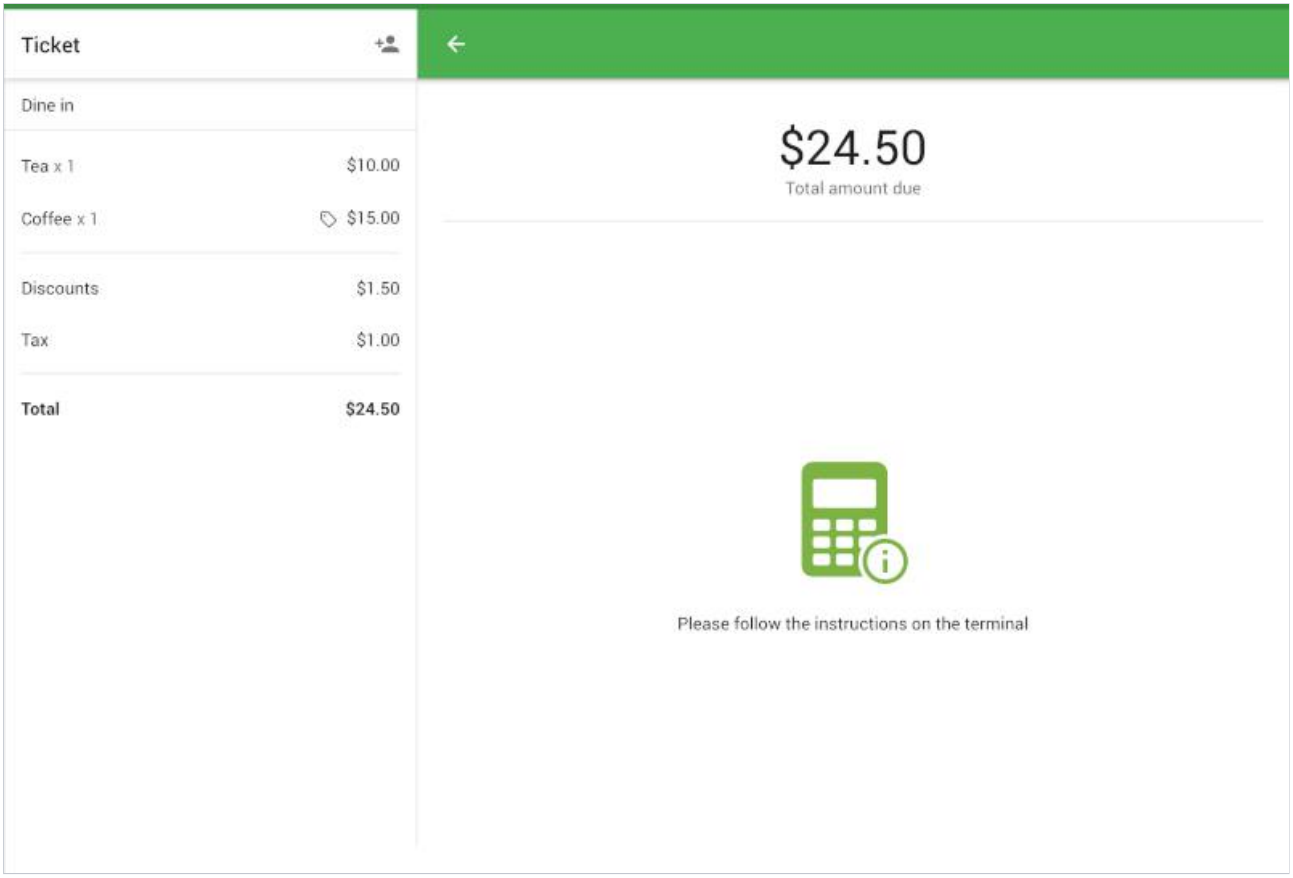
Make sure the terminal is connected to the internet before processing payments.

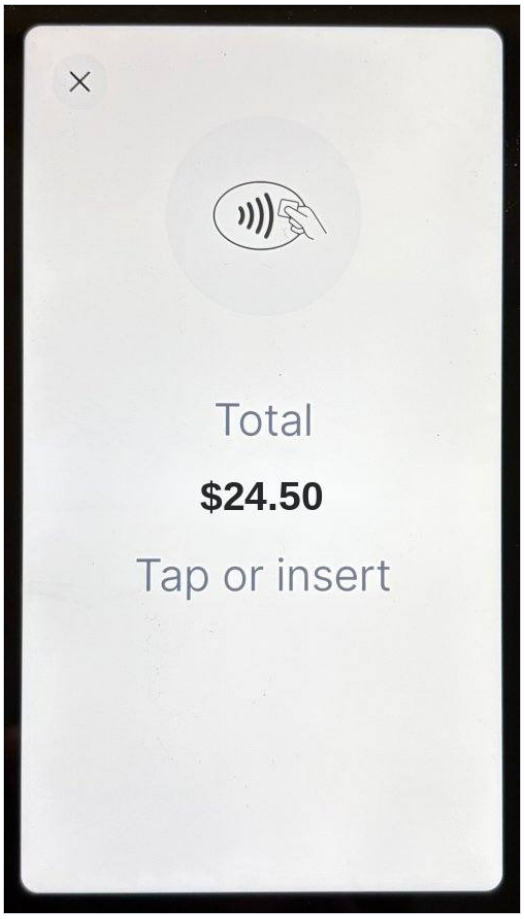
Add items to the ticket and tap **Charge**.

Select **Loyverse Payments** as the payment method.



Follow the instructions on the terminal. The customer will be prompted to insert, swipe, or tap their card.


Ticket
Dine in
Tea x 1
$10.00
Coffee x 1
$15.00
Discounts
$1.50
Tax
$1.00
Total
$24.50
$24.50
Total amount due
Please follow the instructions on the terminal


Total
$24.50
Tap or insert

If the Payment Is Successful

- Loyverse POS will display the total amount paid.
- You can print the receipt, email it to the customer, or start a new sale.

If the Transaction Fails

- An error message will be displayed on the POS screen.
- You can return to the payment method selection screen to retry, or choose an alternative payment method such as cash.

See also:

How to Activate Loyverse Payments

How to Process Refunds of Sales Made with Loyverse Payments

How to Accept Card Payments with Loyverse POS through Tap to Pay on a Smartphone

How to View Card Transactions of Loyverse Payments and Payouts

Supported countries for Loyverse Payments

Loyverse Payments is available to eligible businesses in the countries listed below. Your business must be registered in one of these countries, and you need a business bank account in the same country to receive payouts.

Select your country to see processing rates, supported cards, payout times, and bank account and business requirements.

Note: If your country isn't listed, you can still accept card payments in Loyverse POS by using a third-party payment provider.

Loyverse Payments for United States

If your business is registered in the United States, you can use Loyverse Payments to accept card payments in Loyverse POS with Tap to Pay on a compatible smartphone or a payment terminal.

When you activate Loyverse Payments, you might be asked to verify your identity and your business.

Rates and fees

Processing fees are charged when a card transaction is processed. There is no setup fee, monthly fee, or long-term contract.

Debit cards	**1.99% + 15¢ per in-person transaction**
Credit cards	2.49% + 15¢ per in-person transaction

Other fees

Monthly fee	**$0**
Monthly minimum	None
Setup / activation fee	$0
Statement fee	$0
PCI fee	$0
Batch fee	$0
Contract / lock-in	None
Chargeback fee	$20 per case

Supported cards and wallets

- Visa
- Mastercard
- American Express
- Discover
- Apple Pay
- Google Pay

Payouts and settlement times

Payouts are sent automatically every business day. Funds are typically available in your connected bank account within **2 business days after the transaction**. You can review card transactions, processing fees, refunds, and payouts from **Back Office → Payments**.

Bank account and business requirements

To activate Loyverse Payments in the United States, you need:

- An eligible US-registered business
- A US business bank account for payouts
- Business and account information required for verification

- An internet connection for processing card payments

Card payments require an internet connection. Loyverse POS can continue recording supported offline sales, but Loyverse Payments card transactions cannot be processed while the device is offline.

Loyverse Payments for Belgium

If your business is registered in Belgium, you can use Loyverse Payments to accept card payments in Loyverse POS with Tap to Pay on a compatible smartphone or a payment terminal.

When you activate Loyverse Payments, you might be asked to verify your identity and your business.

Rates and fees

Processing fees are charged when a card transaction is processed. There is no setup fee, monthly fee, or long-term contract.

Consumer cards Personal debit and credit cards	**1.19% per in-person transaction**
Business or international cards Business and corporate cards, and cards issued outside Belgium	2.19% per in-person transaction
American Express and other card schemes	2.19% per in-person transaction

Other fees

Monthly fee	**€0**
Monthly minimum	None
Setup / activation fee	€0
Statement fee	€0
PCI fee	€0
Batch fee	€0
Contract / lock-in	None
Chargeback fee	€20 per case

Supported cards and wallets

- Visa
- Mastercard
- American Express
- Discover

- Apple Pay
- Google Pay

Payouts and settlement times

Payouts are sent automatically every business day. Funds are typically available in your connected bank account within **2 business days after the transaction**. You can review card transactions, processing fees, refunds, and payouts from **Back Office → Payments**.

Bank account and business requirements

To activate Loyverse Payments in Belgium, you need:

- An eligible business registered in Belgium
- A Belgian business bank account for payouts
- Business and account information required for verification
- An internet connection for processing card payments

Card payments require an internet connection. Loyverse POS can continue recording supported offline sales, but Loyverse Payments card transactions cannot be processed while the device is offline.

Loyverse Payments for Switzerland

If your business is registered in Switzerland, you can use Loyverse Payments to accept card payments in Loyverse POS with Tap to Pay on a compatible smartphone or a payment terminal.

When you activate Loyverse Payments, you might be asked to verify your identity and your business.

Rates and fees

Processing fees are charged when a card transaction is processed. There is no setup fee, monthly fee, or long-term contract.

Consumer cards Personal debit and credit cards	**1.19% per in-person transaction**
Business or international cards Business and corporate cards, and cards issued outside Switzerland	2.19% per in-person transaction
American Express and other card schemes	2.19% per in-person transaction

Other fees

Monthly fee	**CHF 0**
Monthly minimum	None
Setup / activation fee	CHF 0
Statement fee	CHF 0
PCI fee	CHF 0
Batch fee	CHF 0
Contract / lock-in	None
Chargeback fee	CHF 20 per case

Supported cards and wallets

- Visa
- Mastercard
- American Express
- Discover
- Apple Pay
- Google Pay

Payouts and settlement times

Payouts are sent automatically every business day in Swiss francs (CHF). Funds are typically available in your connected bank account within **2 business days after the transaction**. You can review card transactions, processing fees, refunds, and payouts from **Back Office → Payments**.

Bank account and business requirements

To activate Loyverse Payments in Switzerland, you need:

- An eligible business registered in Switzerland
- A Swiss business bank account for payouts
- Business and account information required for verification
- An internet connection for processing card payments

Card payments require an internet connection. Loyverse POS can continue recording supported offline sales, but Loyverse Payments card transactions cannot be processed while the device is offline.

How to Accept Card Payments with Loyverse POS Using Tap to Pay on a Smartphone

Tap to Pay allows merchants to accept contactless payments from credit and debit cards directly on a smartphone running the Loyverse POS app — no additional hardware required.

Note: Tap to Pay is currently available in the **USA, Switzerland, and Belgium**.

Before You Begin

Loyverse Payments must be activated on your account in the Back Office, and a Loyverse Payments payment type must be configured.

Setting Up on Android

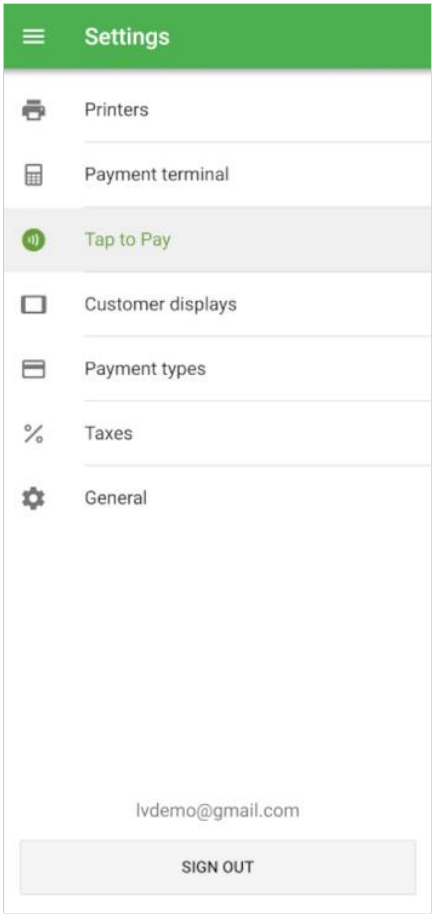
Requirements

- NFC-enabled smartphone running **Android 13 or higher**.
- **Developer options** must be disabled.
- **NFC** must be enabled.
- Security patch must be up to date.
- An active internet connection.
- Device **location** must be on, with location permission granted to the Loyverse POS app.

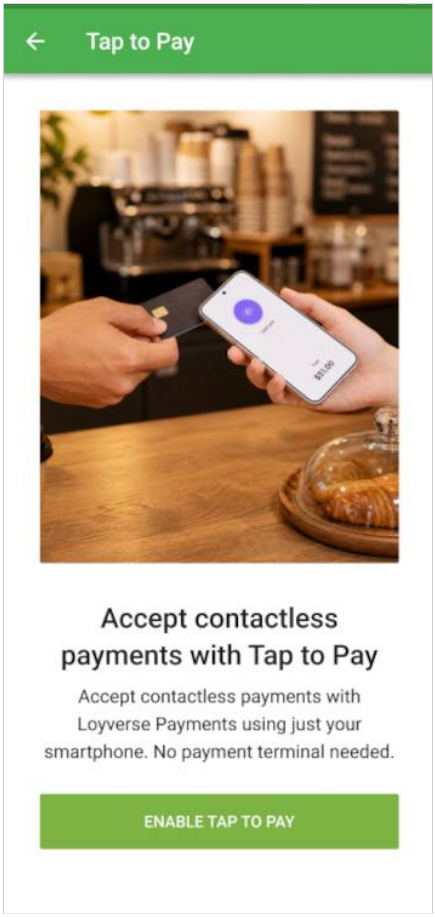
Setup Steps

Log in to the POS at a store with an active Loyverse Payments payment type.

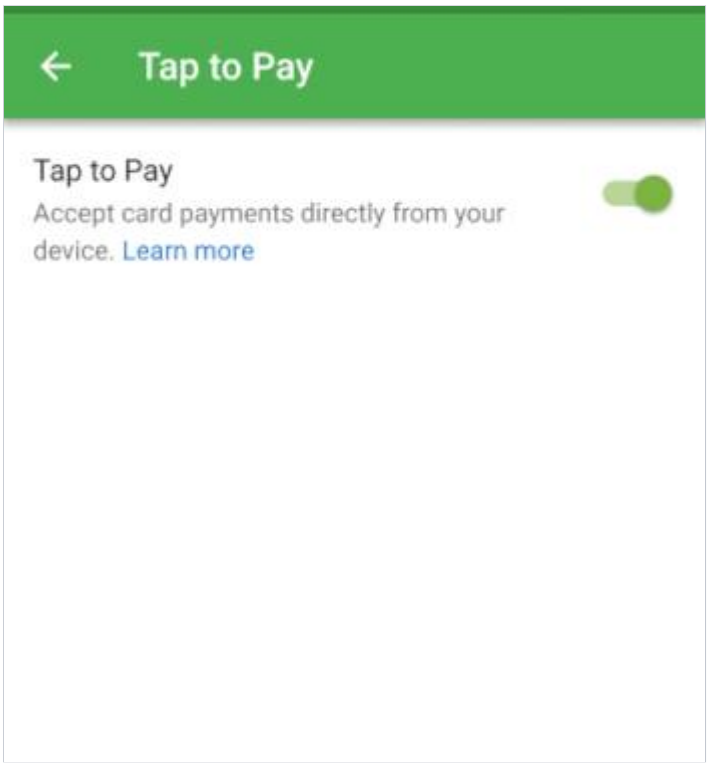
Go to **Settings → Tap to Pay**.



Enable **Tap to Pay**.



Once enabled, your Android smartphone is ready to accept contactless card payments.



Setting Up on iPhone

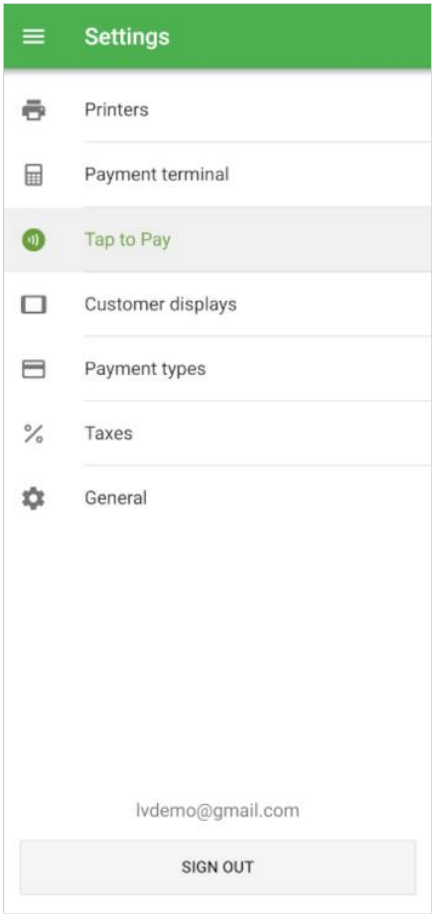
Requirements

- **iPhone XS** or newer.

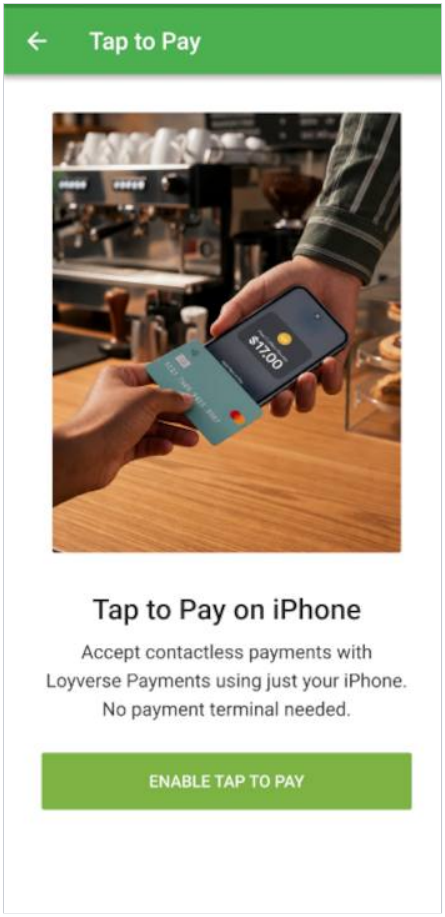
Setup Steps

Log in to the POS at a store with an active Loyverse Payments payment type.

Go to **Settings → Tap to Pay**.



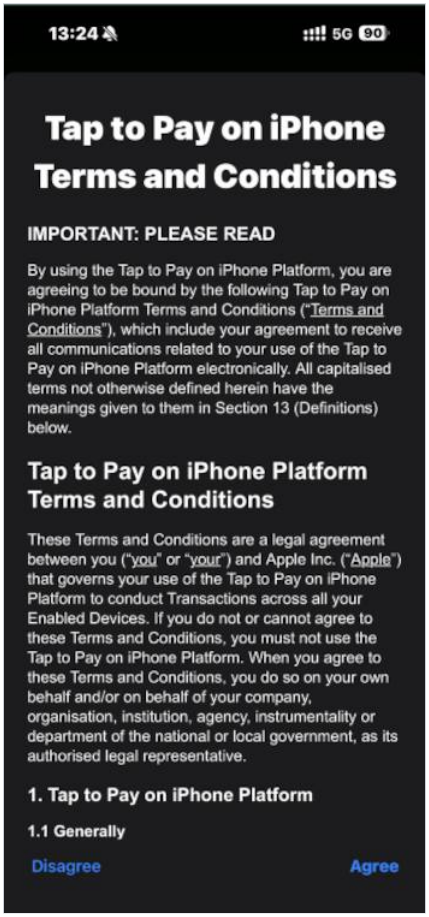
Enable **Tap to Pay**.



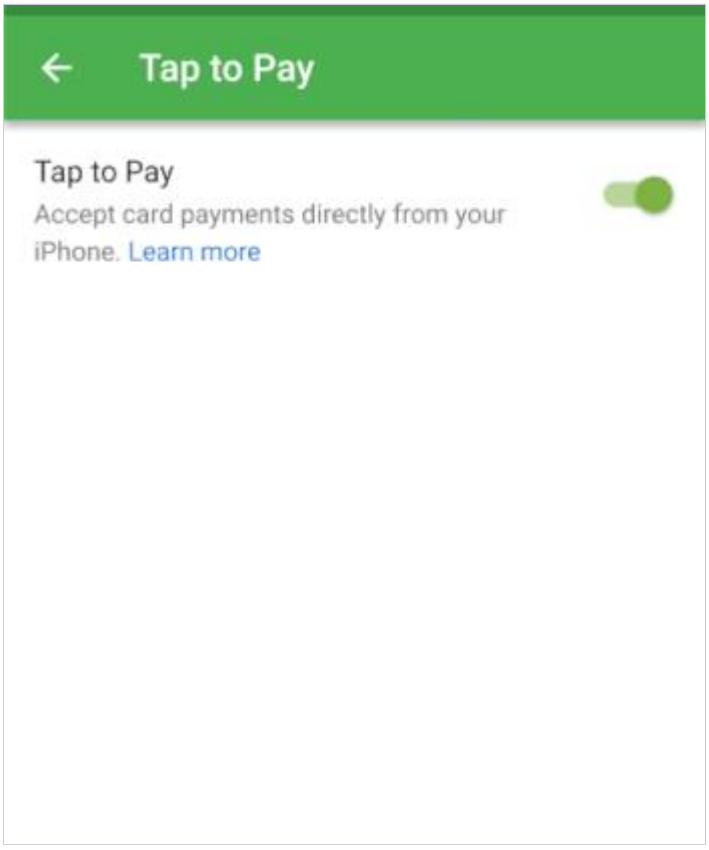
Tap **Continue** to link your Apple account to accept contactless payments.



Read and accept the terms and conditions. Your account will then be linked.



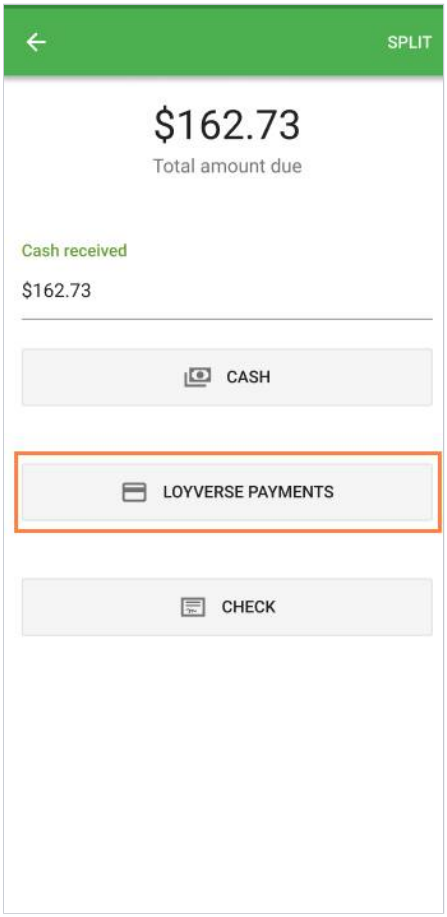
Once enabled, your iPhone is ready to accept contactless card payments.



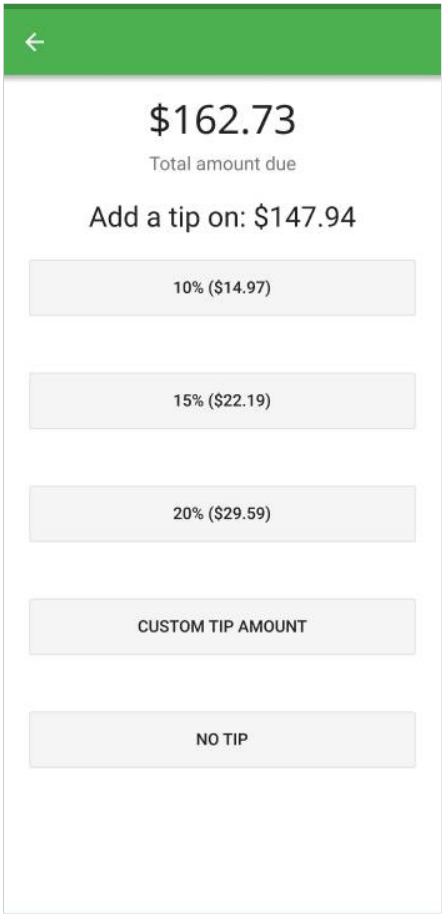
Processing a Payment

Add items to the ticket and tap **Charge**.

Select **Loyverse Payments** as the payment method.



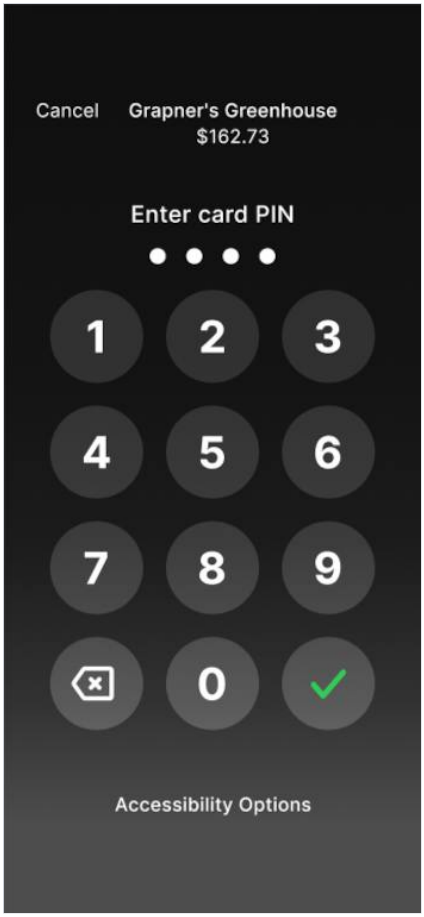
If tips are enabled in the payment type settings, tip options will appear on screen for the customer to select.



The screen will begin to blink, indicating the smartphone is ready to receive the card tap:

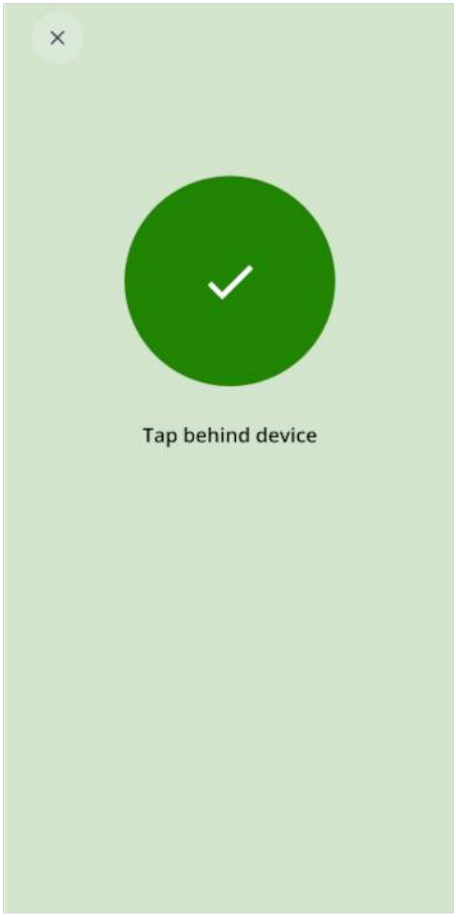
- On **iPhone**: the customer can tap on the screen or the back of the device.

Turn the screen toward the customer so they can enter their **PIN** to approve the transaction.

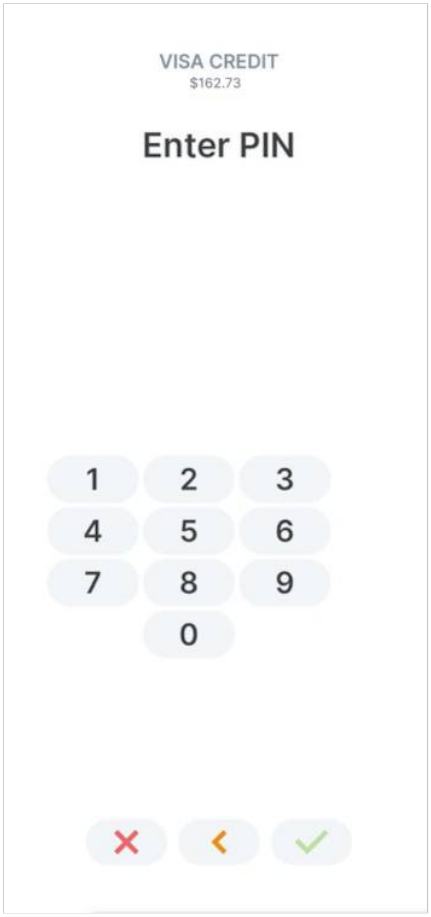


- On **Android**: the customer should tap from the back of the device only.

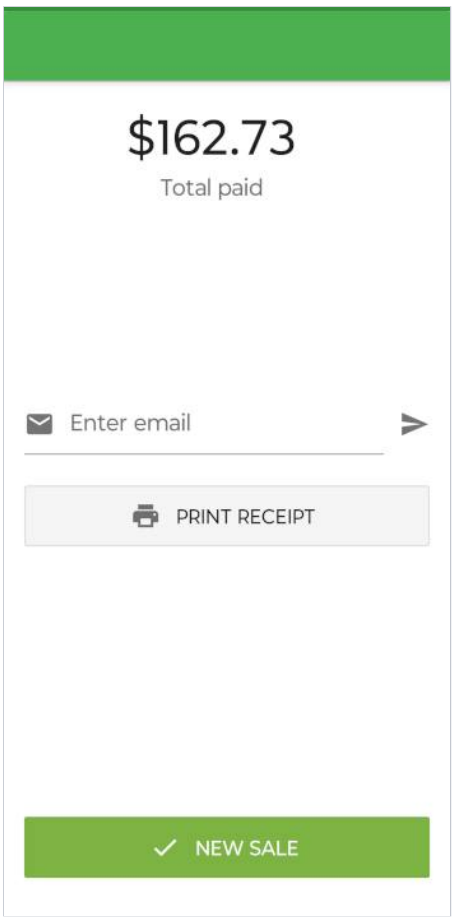
A green confirmation indicator will appear once the payment is complete.



If prompted, turn the screen toward the customer so they can enter their **PIN** to approve the transaction.



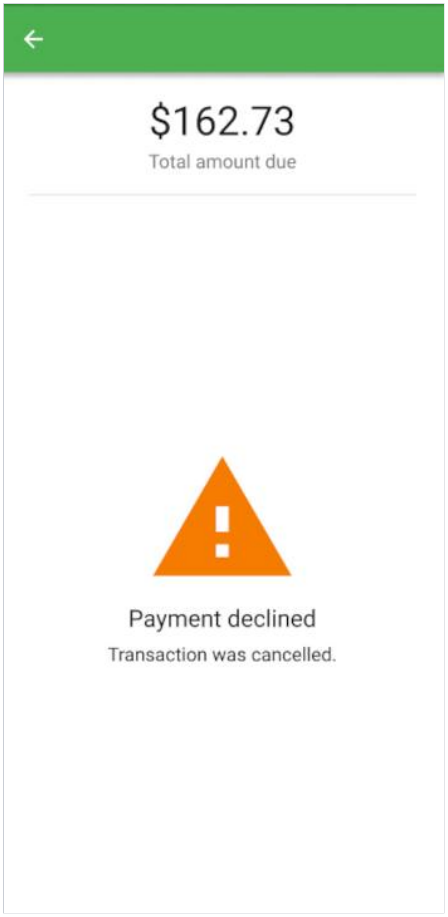
Loyverse POS will display the total amount paid.



You can then print a receipt, email it to the customer, or start a new sale.

If the Transaction Fails

- An error message will be displayed on the POS screen.



- You can return to the payment method selection screen to retry, or choose an alternative payment method such as cash.

See also:

How to Activate Loyverse Payments

How to Accept Card Payments with Loyverse POS and Loyverse Payments on Terminal

How to Process Refunds of Sales Made with Loyverse Payments

How to View Card Transactions of Loyverse Payments and Payouts

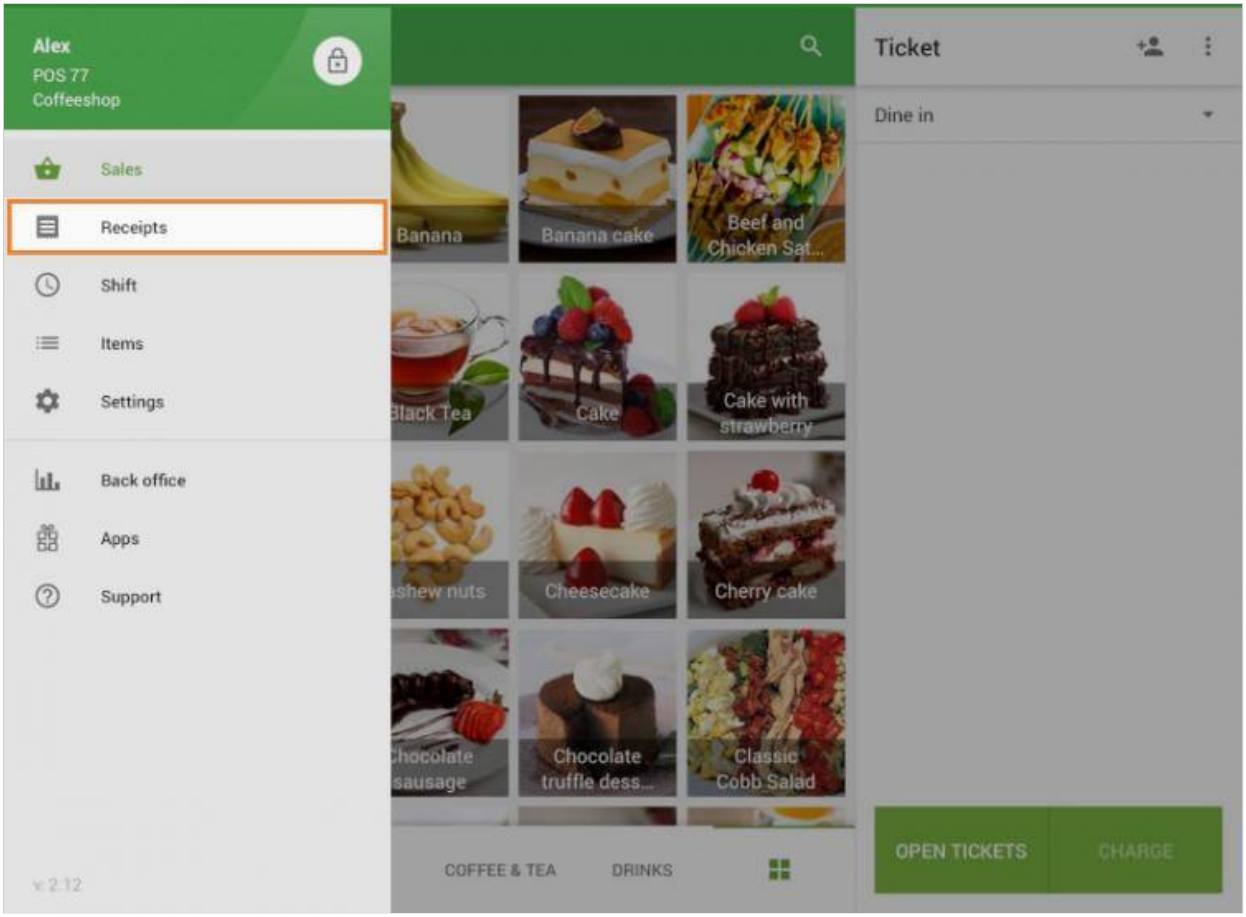
How to Process Refunds with Loyverse Payments

You can process refunds for sales made with Loyverse Payments — whether the original payment was made at a terminal or via Tap to Pay. Both **full** and **partial** refunds are supported.

Note: No terminal or card is required to process a refund.

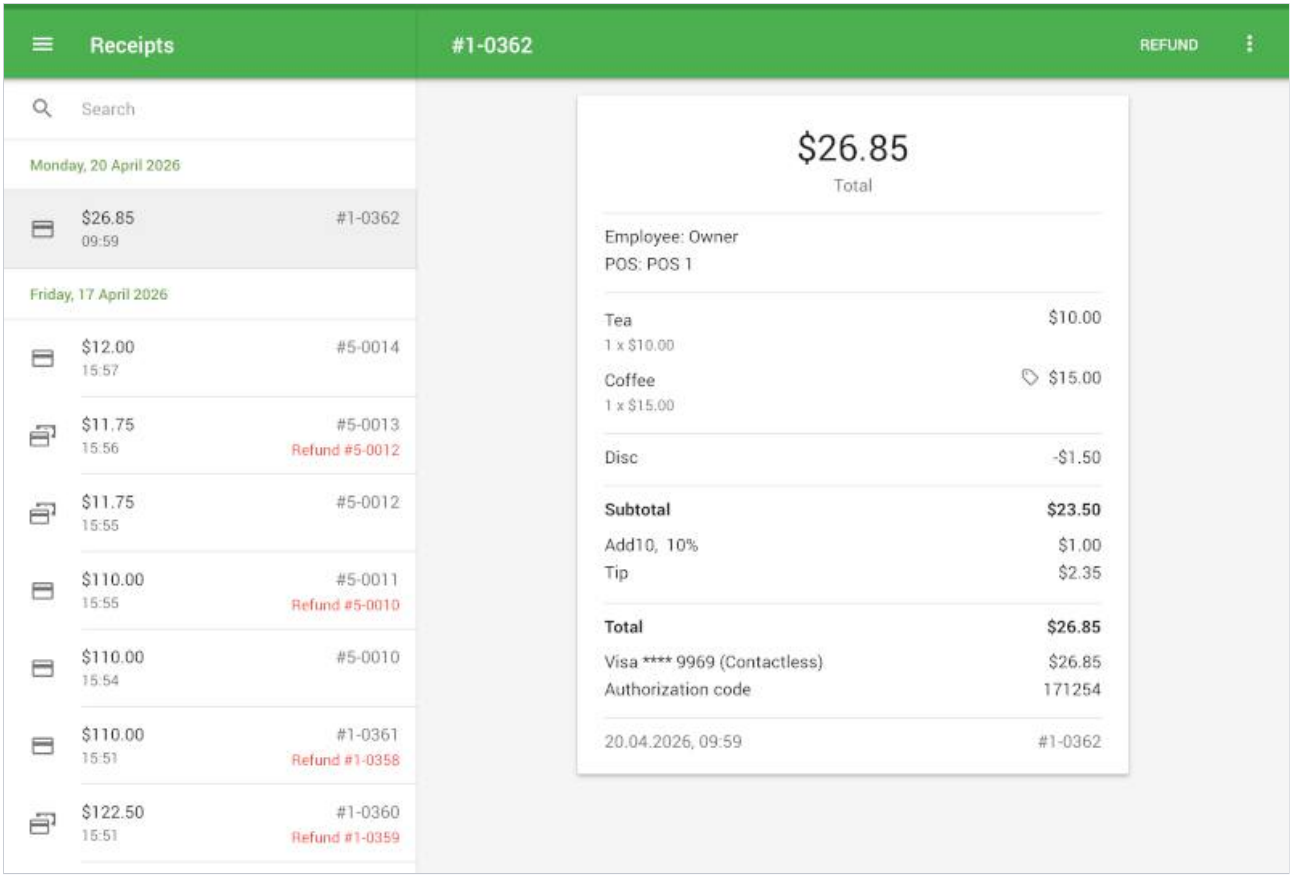
Steps to Process a Refund

In the Loyverse POS app, go to the **Receipts** menu.

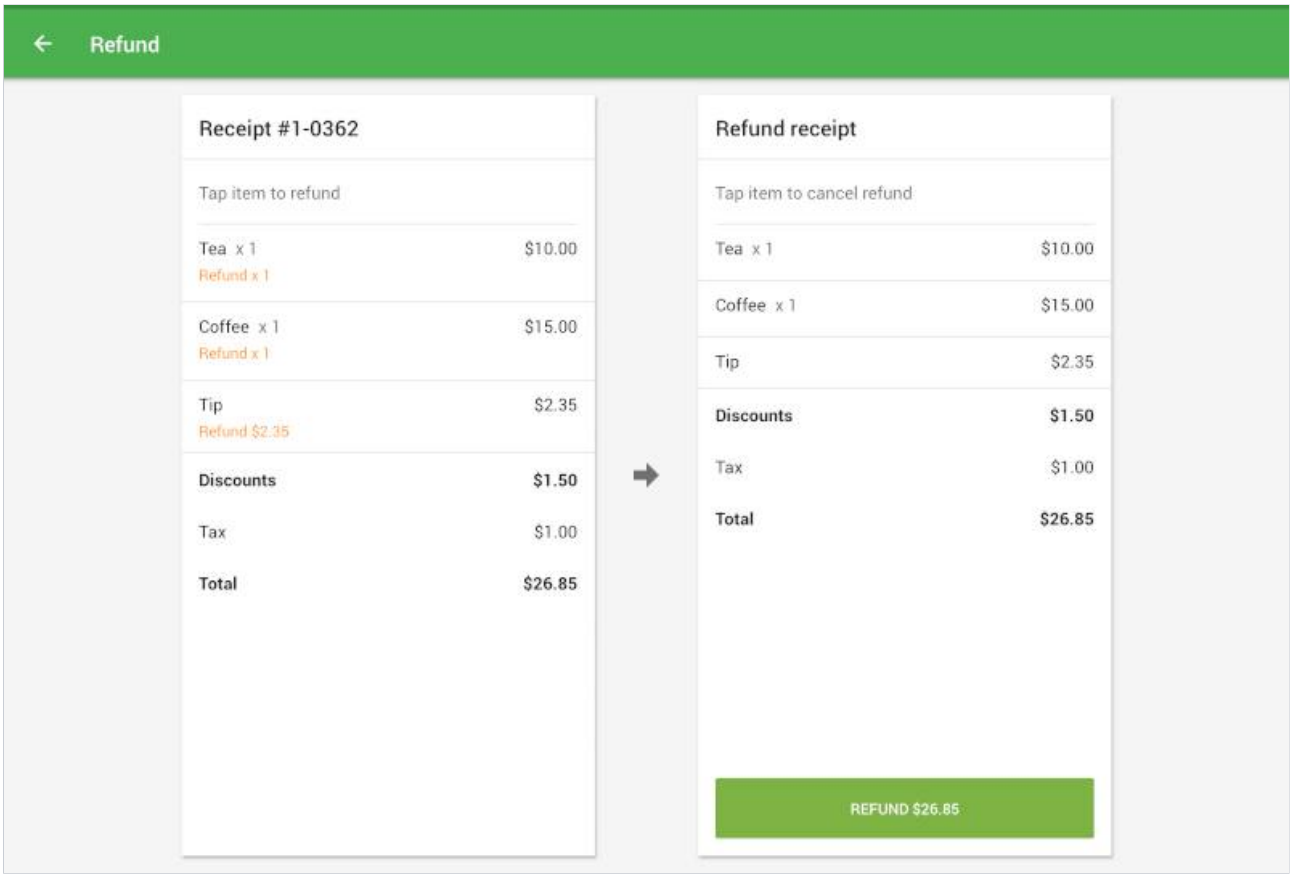


Tap the receipt you want to refund.

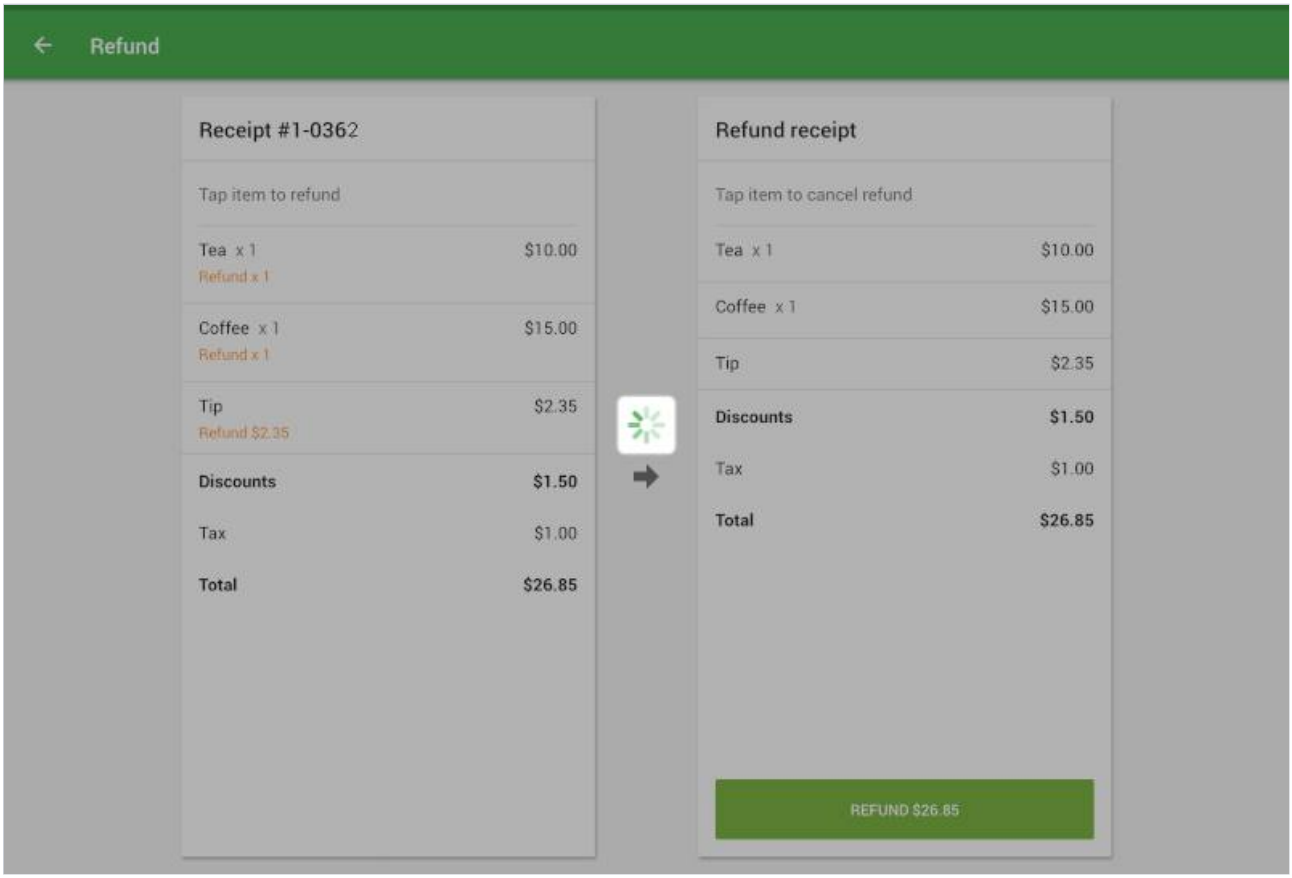
Tap **Refund**.



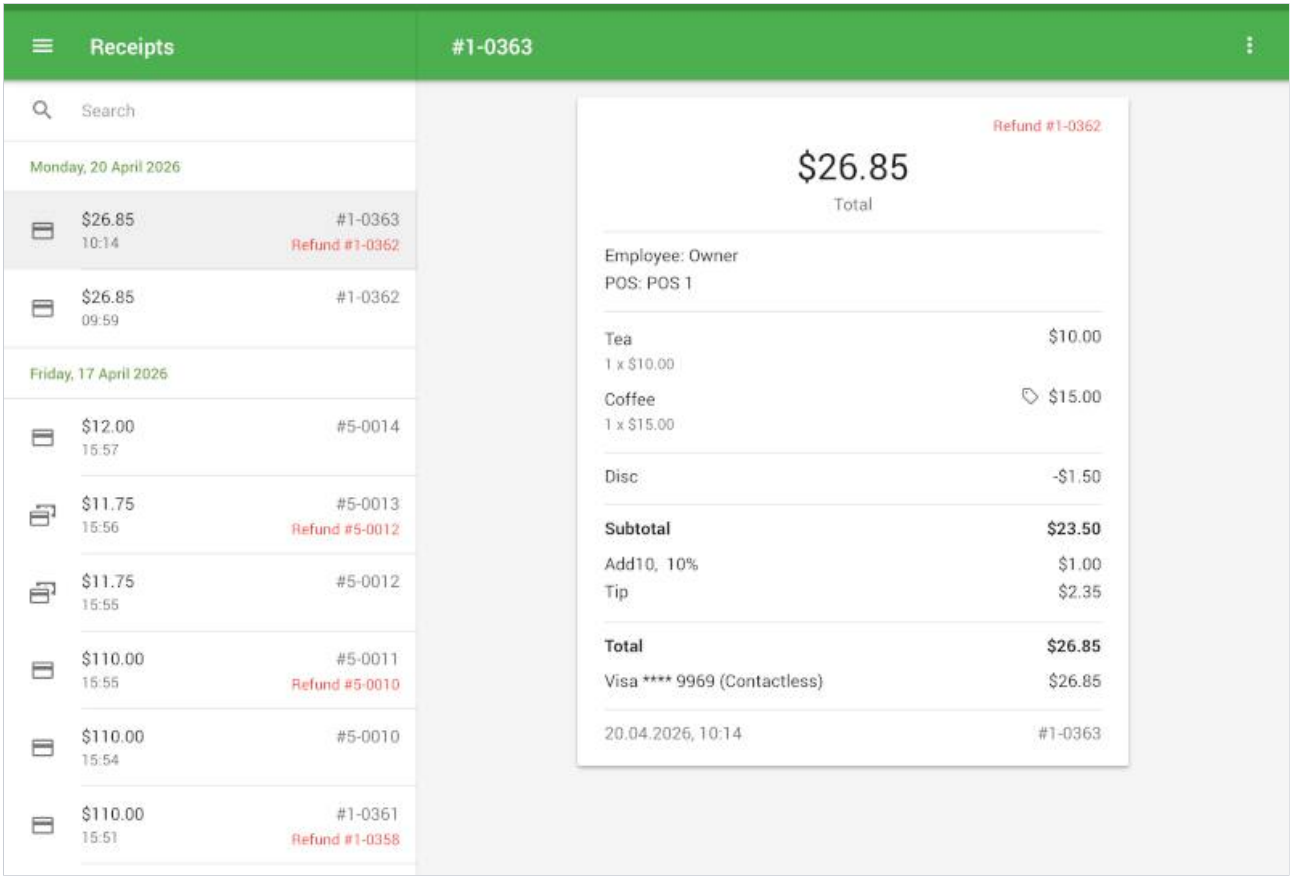
Select the items to refund — they will move to the right side of the screen. If applicable, you can also select the tip amount to refund.



Tap the Refund button to confirm.



Once processed, the refund will be applied and a refund receipt will be added automatically.



See also:

[How to Activate Loyverse Payments]

[How to Accept Card Payments with Loyverse POS and Loyverse Payments on Terminal]

[How to Accept Card Payments with Loyverse POS through Tap to Pay on a Smartphone]

[How to View Card Transactions of Loyverse Payments and Payouts]

How to Accept Card Payments with Loyverse Payments Using a Bluetooth Card Reader

Loyverse POS merchants can accept credit and debit card payments using a **Mobile Reader M**2 and **WisePad 3** — compact card readers that connect to mobile devices running Loyverse POS via Bluetooth.

Note: With Loyverse Payments, **Mobile Reader M2** is available only in the **USA**, while **WisePad 3** is available only in **Switzerland and Belgium**.

Before You Begin

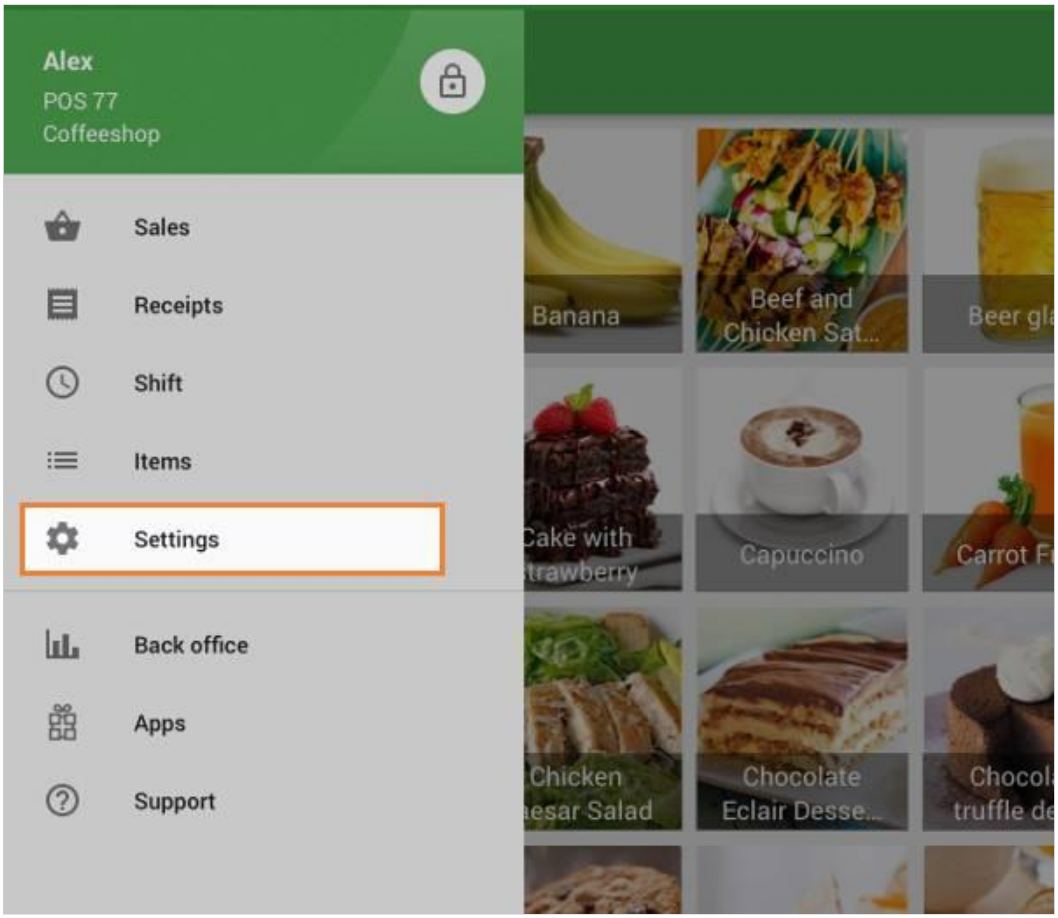
- Loyverse Payments must be activated on your account in the Back Office, and a **Loyverse Payments** payment type must be configured.

- You must have ordered and received your Bluetooth card reader through the Loyverse online store.
- Do not pair the card reader manually through your mobile device's Bluetooth settings. Pairing must be completed directly in the Loyverse POS app.

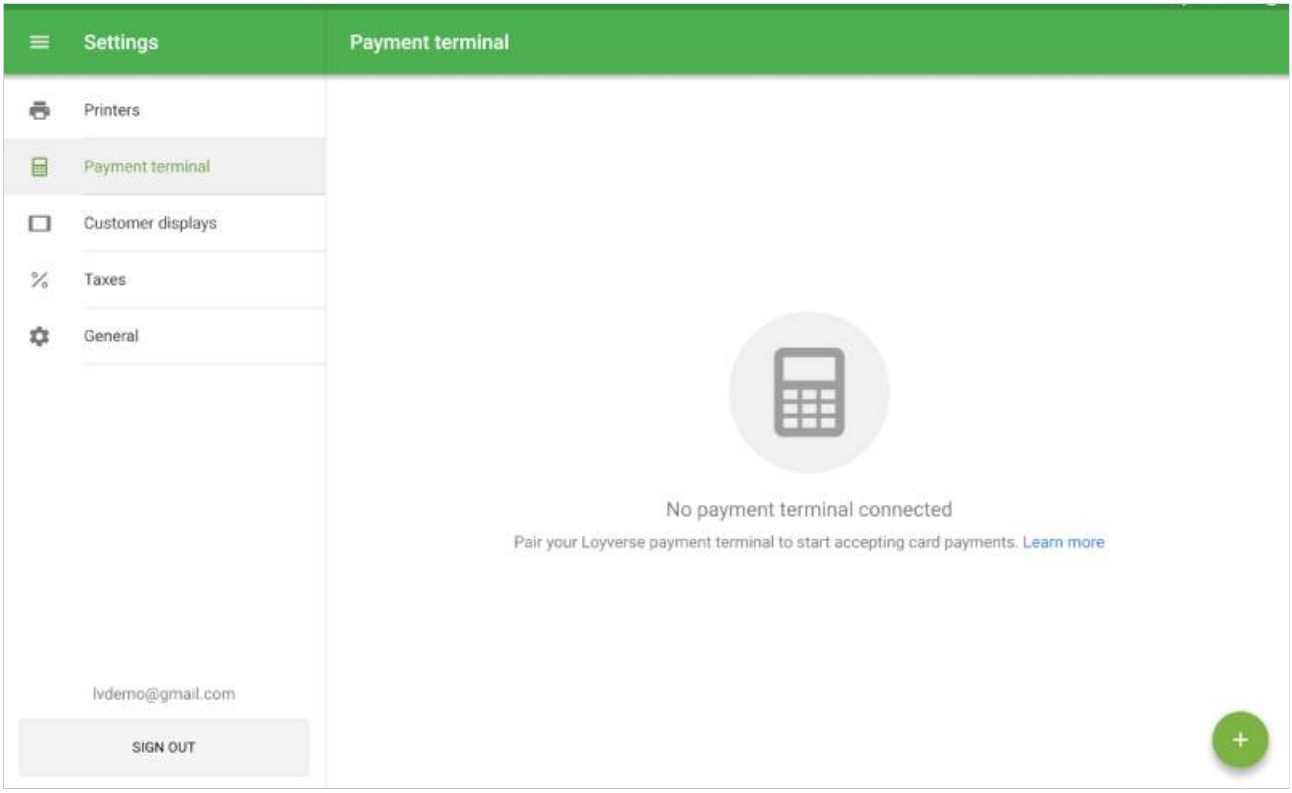
1. Connecting the Card Reader to Loyverse POS

1. Open the **Loyverse POS** app.

2.Go to **Settings → Payment Terminal**.



3.Tap the **+** button to add and pair a new terminal.



4.Select your device as a **Terminal model**.

You may be prompted to grant the app permissions for **location services**, **Bluetooth**, or **nearby devices**, depending on your OS version. These requests typically occur during terminal model selection or when initiating a search for available readers.

5.Turn on the card reader. Then tap **Search** to scan for nearby Bluetooth terminals.

- If Bluetooth is disabled on your device, you will be prompted to enable it before searching.

6.Once the search completes, select your payment device from the list:

- If only one card reader is found, it will be selected automatically.
- If multiple card readers are found, select the correct one from the list by its model name and serial number.

7.Tap **Pair**.
WisePad 3 card readers may ask you for confirmation of the connection. Tap the green button on the device to confirm.

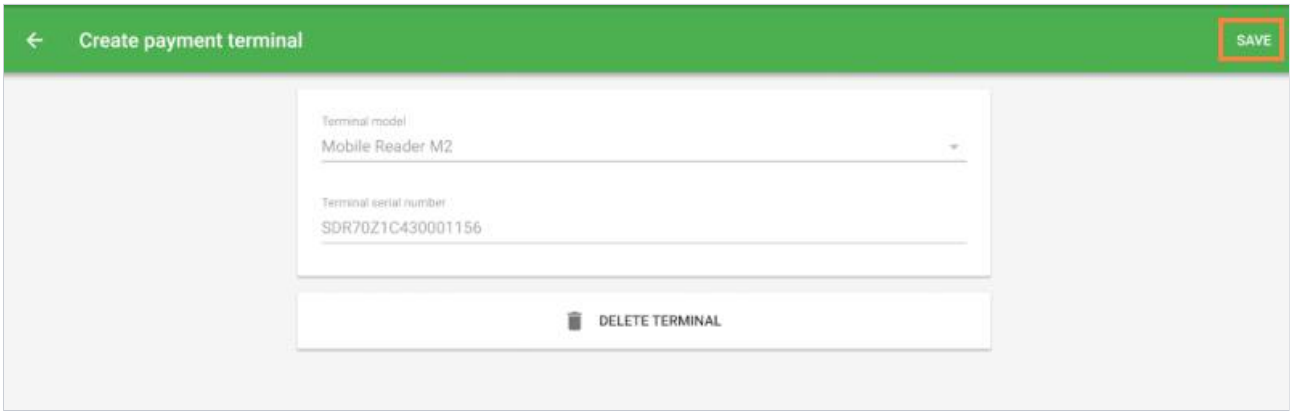
Firmware Updates During Pairing

When you tap **Pair**, the app automatically checks whether a firmware update is available for the card reader:

- **Required update** — The update starts immediately. A progress indicator is displayed on screen. The card reader will be paired only after the update completes successfully.
- **Optional update** — After pairing, you will be prompted to install the update. You can choose to Install Now or Cancel.

Note: If the card reader battery is too low, the firmware update cannot start and an error message will be displayed. Charge the card reader before trying again. If a firmware update is interrupted for any reason, the card reader will not be paired and you will need to restart the process.

8.After successful pairing, tap **Save** to add the card reader as the payment card reader for this POS.



The paired card reader device will appear in the **Payment Terminal** section with its model name and serial number.

Firmware Updates When Launching the POS App

If a firmware update is available when you open the Loyverse POS app, the following will happen:

- **Required update** — A notification is displayed. After you dismiss it, the update continues in the background. You can monitor progress in your device's notification area.
- **Optional update** — You will be prompted to Install Now or Cancel. If you choose to install, the update runs in the background.

Once a background update is complete, a confirmation message will appear on screen. If the update fails, you will see a corresponding error notification.
Note: If you begin a payment while a firmware update is in progress, the update progress will be shown on the Payment screen. The payment cannot be processed until the update is complete.

2. Processing a Payment

Make sure the device running Loyverse POS is connected to the internet, and the card reader is connected to the POS via Bluetooth, before processing payments.

1.Add items to the ticket and tap **Charge**.

2.Select **Loyverse Payments** as the payment method.

3.If **tips** are enabled, you will also see a **tip selection** screen.

4.The customer will be prompted to tap, insert, or swipe their card on the **Mobile Reader M2** or tap or insert on the **WisePad 3**.

If the Payment Is Successful

- Loyverse POS will display the total amount paid.
- You can print the receipt, email it to the customer, or start a new sale.

If the Transaction Fails

- An error message will be displayed on the POS screen.
- You can return to the payment method selection screen to retry, or choose an alternative payment method such as cash.

See also:

How to Activate Loyverse Payments

How to Process Refunds of Sales Made with Loyverse Payments

How to Accept Card Payments with Loyverse POS and Loyverse Payments on Terminal

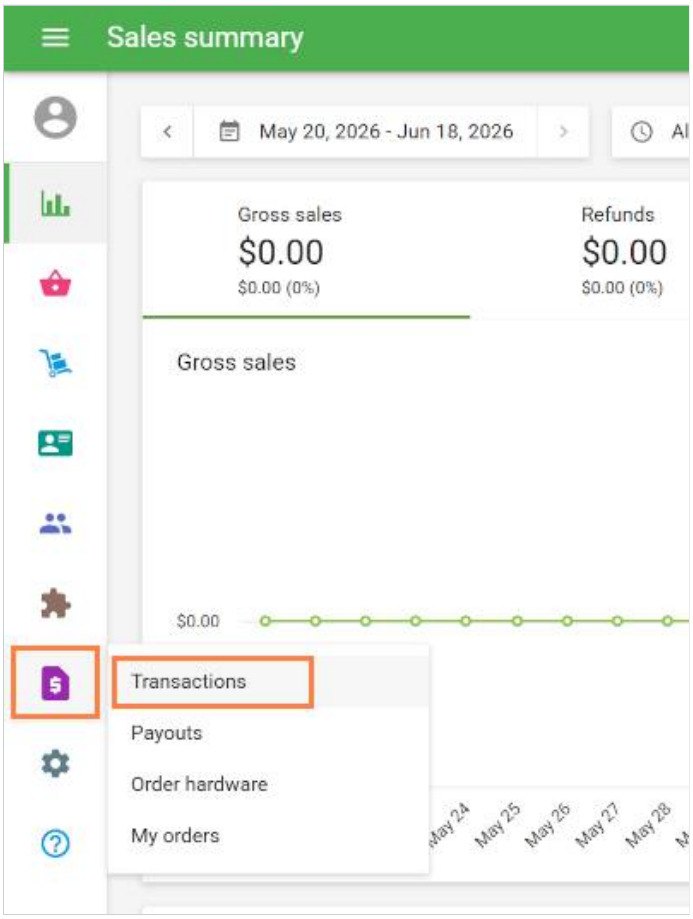
How to Accept Card Payments with Loyverse POS through Tap to Pay on a Smartphone

How to View Card Transactions of Loyverse Payments and Payouts

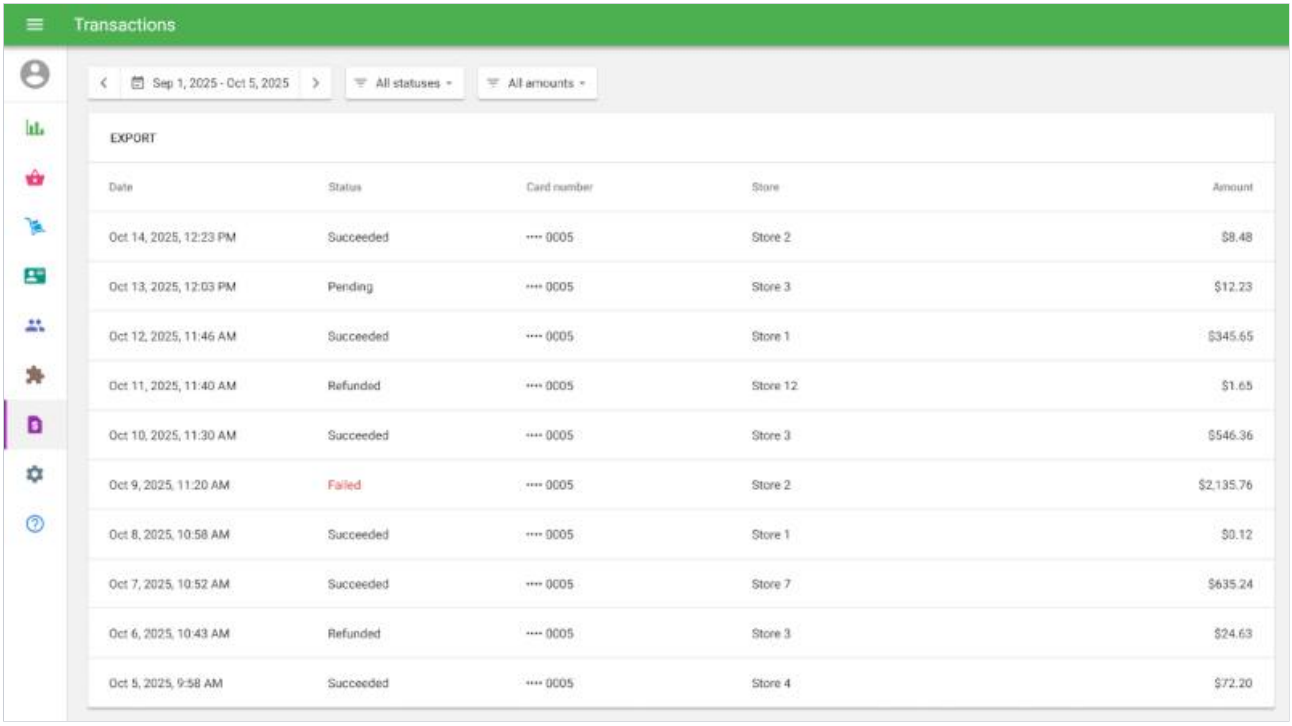
How to View Loyverse Payments Transactions and Payouts

Viewing Transactions

To track card payments and refunds made via Loyverse Payments, go to **Back Office → Payments → Transactions**.



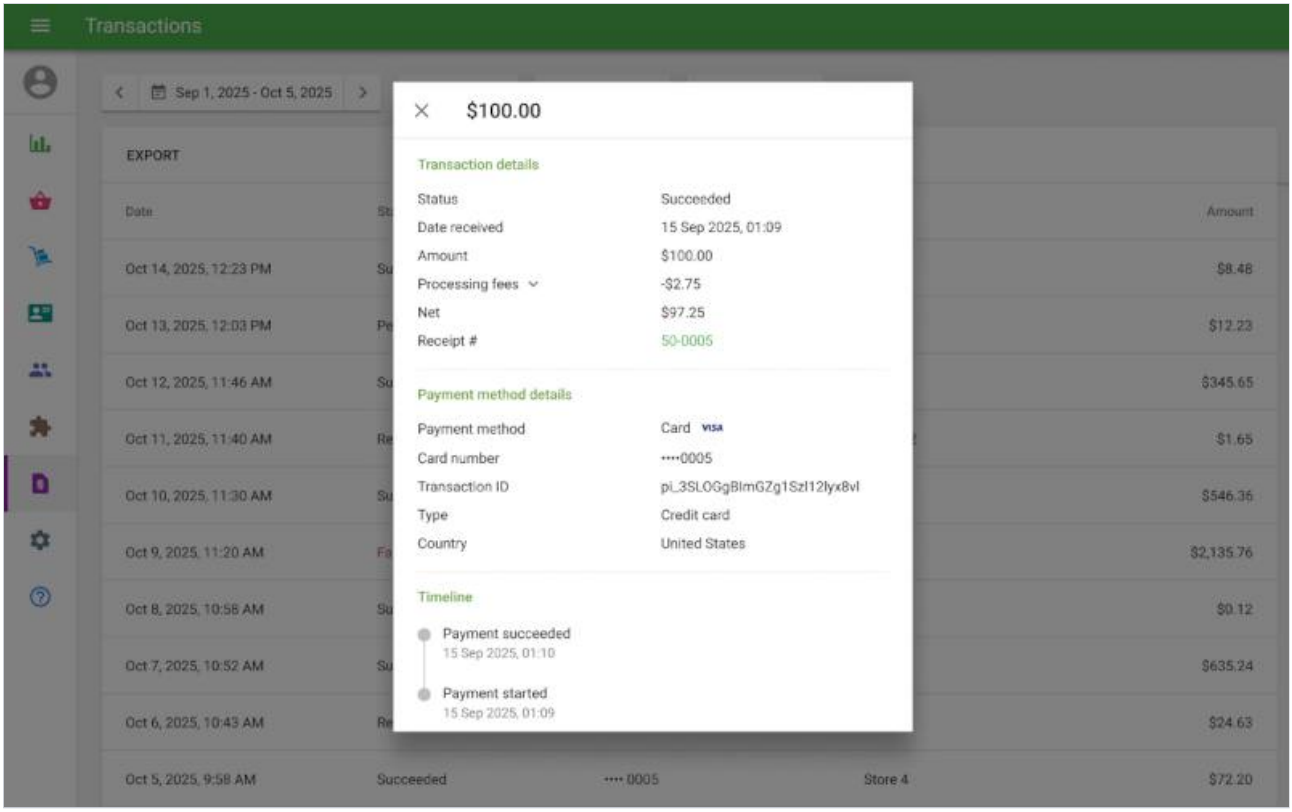
You'll see a list of transactions with the date, status, card number, store, and amount. You can filter the list by **time period**, **status**, or **amount**.



Transaction Statuses

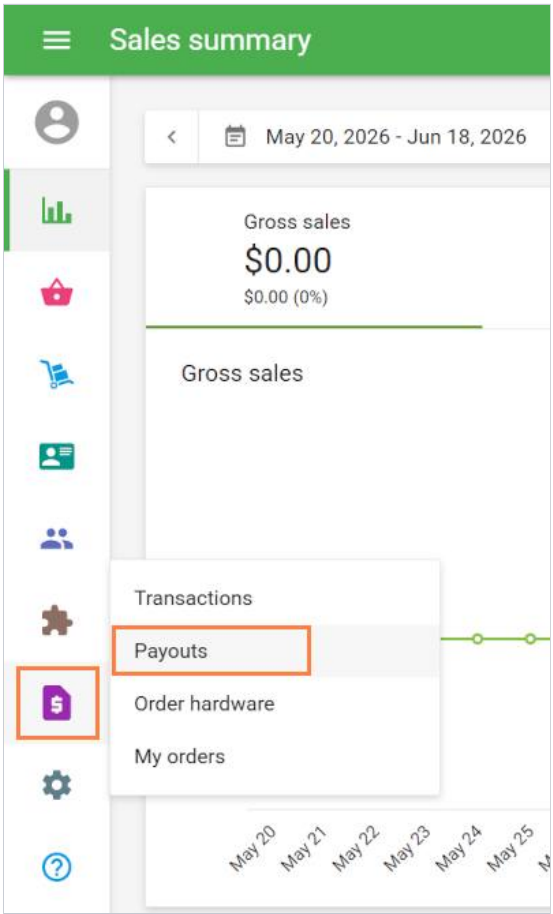
Status	Description
Succeeded	Payment was completed successfully.
Failed	Payment could not be completed (e.g., card declined).
Refunded	The full amount has been refunded.
Partially Refunded	Part of the payment has been refunded.
Disputed	The cardholder has disputed the charge with their bank.

Click any transaction to view its details, including the amount, processing fees, and net amount. The detail view also shows the payment method used and a timeline of events. The **Receipt #** links directly to the associated receipt.

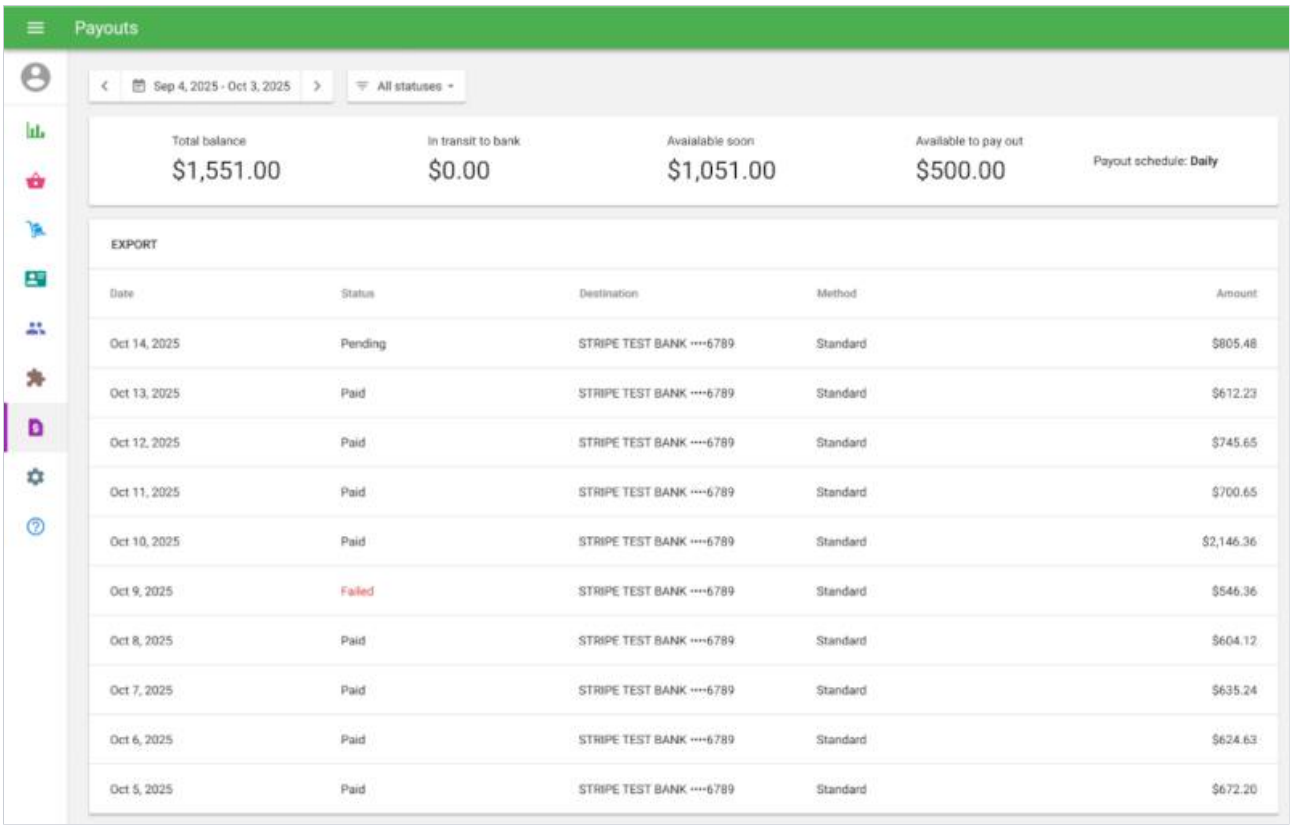


Viewing Loyverse Payments Payout

To view your balance summary and payout history, go to **Back Office → Payments → Payouts**.



Balance Summary



At the top of the page, the balance summary shows where your funds currently are:

Total Balance = In Transit to Bank + Available Soon + Available to Pay Out

Balance Component	Description
In Transit to Bank	Funds that have been sent to your bank but have not yet arrived. This increases when a payout is created and decreases once your bank confirms receipt.
Available Soon	Funds from processed payments that are still within the settlement period (up to 2 business days). Moves to "Available to Pay Out" once the settlement is complete.
Available to Pay Out	Funds that have completed settlement and are ready to be sent to your bank. This can show a negative value if refunds, disputes, or fees exceed your available balance.

Payout List

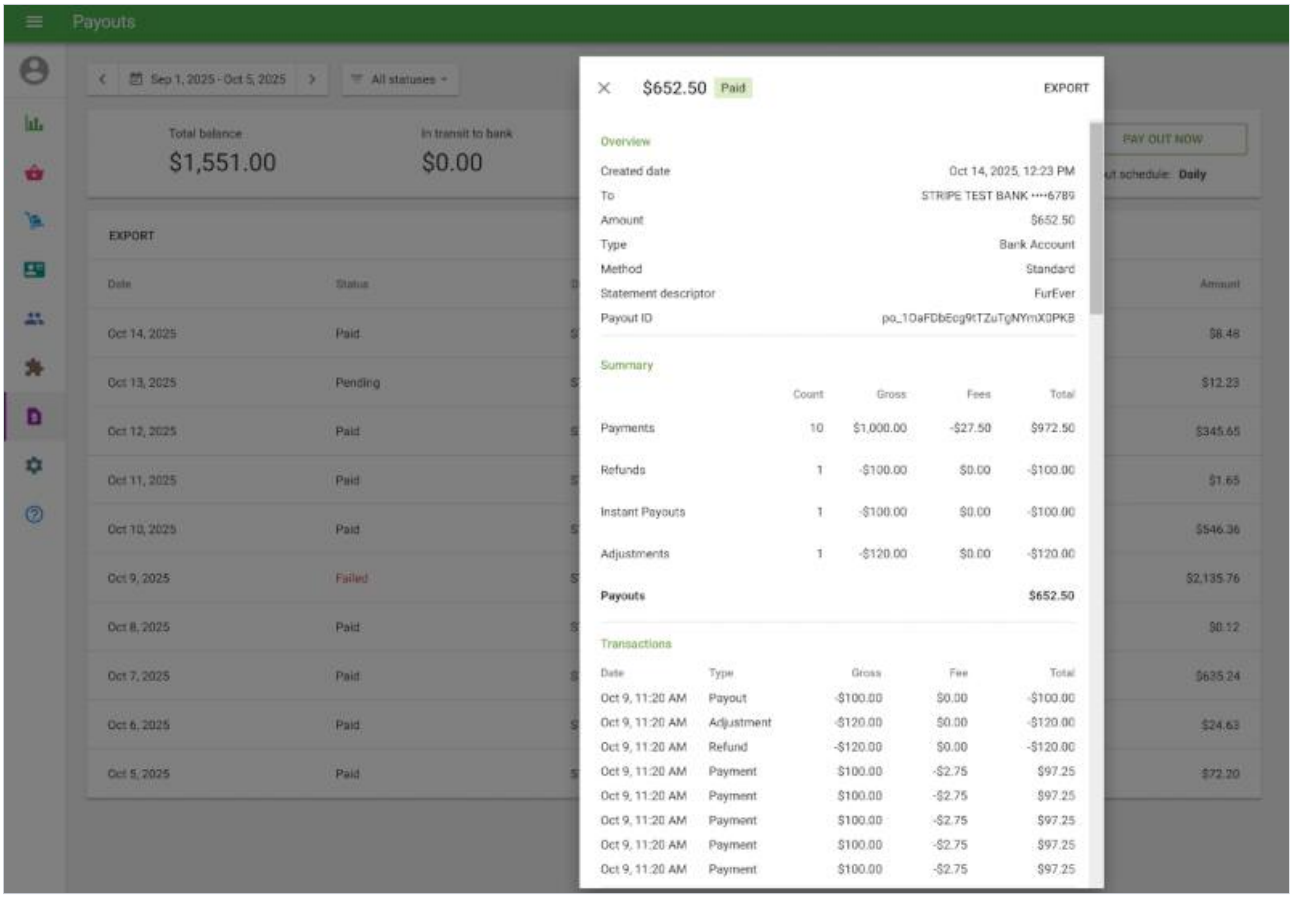
Payouts are made automatically daily on working days. Below the balance summary, you'll see a list of all payouts with their status, destination, and amount.

Payout Statuses

Status	Description
Pending	Payout has been created but hasn't started processing yet.
In Transit	Funds are on the way to your bank account.

Status	Description
Paid	Funds have been deposited to your bank account.
Failed	Payout could not be completed. Funds are returned to your balance.

Click any payout to view its details. The **Summary** section shows totals for payments, refunds, and adjustments, along with associated fees. The **Transactions** section lists every individual transaction included in the payout. You can **export** these transactions as a CSV file, which is useful for reconciling card payment records with your bank statements.

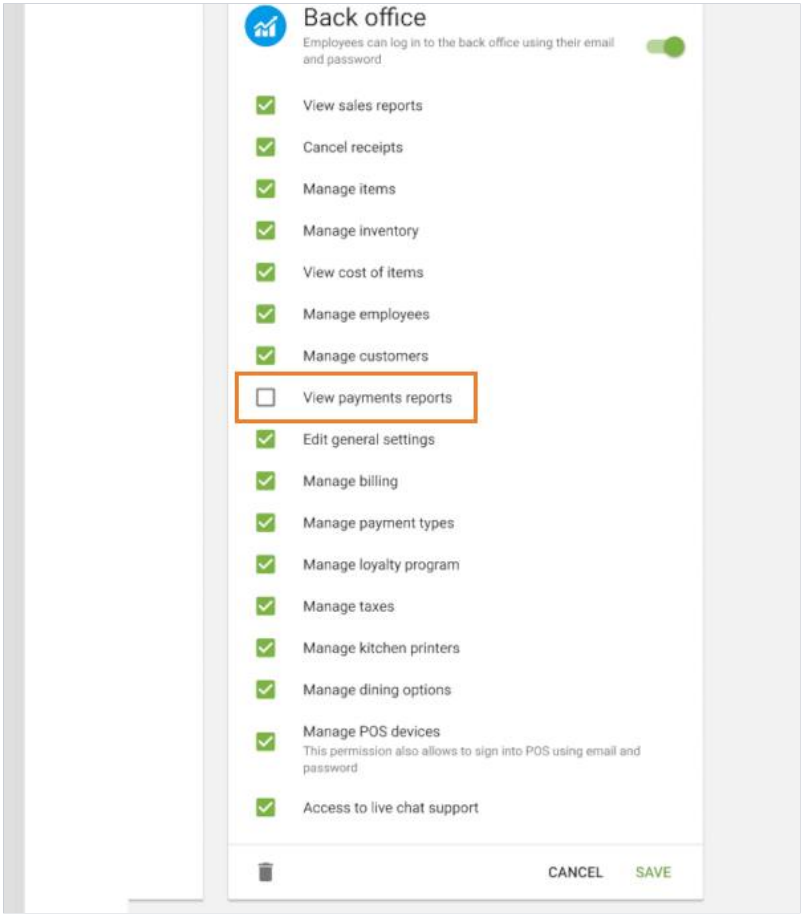


Access rights

By default, only the account **Owner** can view payment reports. To grant this access to other employees, go to the employee's access rights settings and enable **View Payment Reports** for the relevant role.

Enabling this access right allows employees to access the Payments menu in Backoffice.

Note: Loyverse Payments can only be activated by the account owner.



See also:

[How to Activate Loyverse Payments]

[How to Accept Card Payments with Loyverse POS and Loyverse Payments on Terminal]

[How to Process Refunds of Sales Made with Loyverse Payments]

[How to Accept Card Payments with Loyverse POS through Tap to Pay on a Smartphone]

Card providers

How to Accept Credit Cards with Loyverse POS and SumUp

Video
https://www.youtube.com/watch?v=7lpZUkljGpQ

Loyverse POS merchants can accept credit card payments via SumUp and available to customers in 30+ countries: Australia, Austria, Belgium, Brazil, Bulgaria, Chile, Cyprus, Colombia, Czech Republic, Denmark, Estonia, Finland, Greece, Hungary, Ireland, Italy, Latvia, Lithuania,

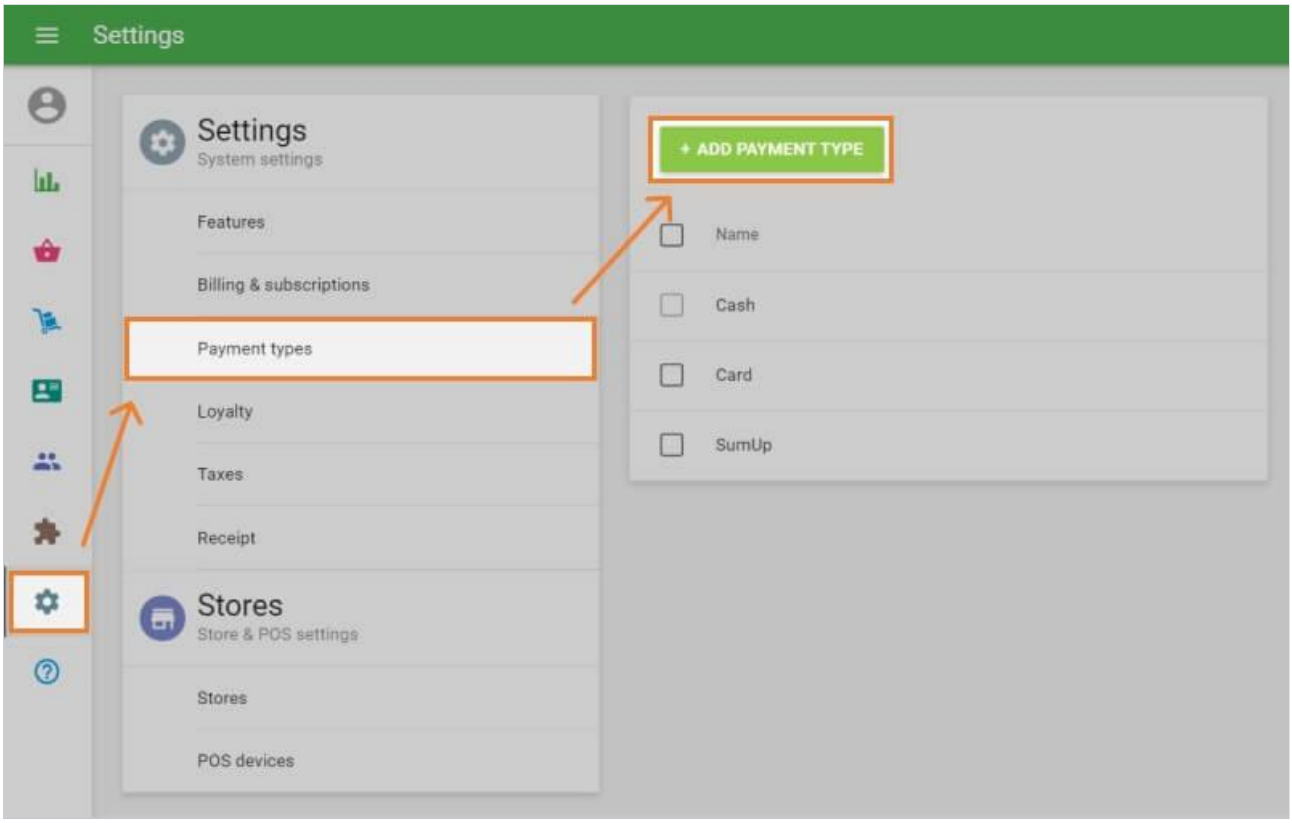
Luxembourg, Malta, Norway, Peru, Poland, Portugal, Puerto Rico, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, The Netherlands, United Kingdom, United States.

Before connecting a card reader, you have to create an account in SumUp and receive the device. Integration with Loyverse POS works on SumUp Air 1E000, Solo, Solo Lite, and Solo+Printer card readers.

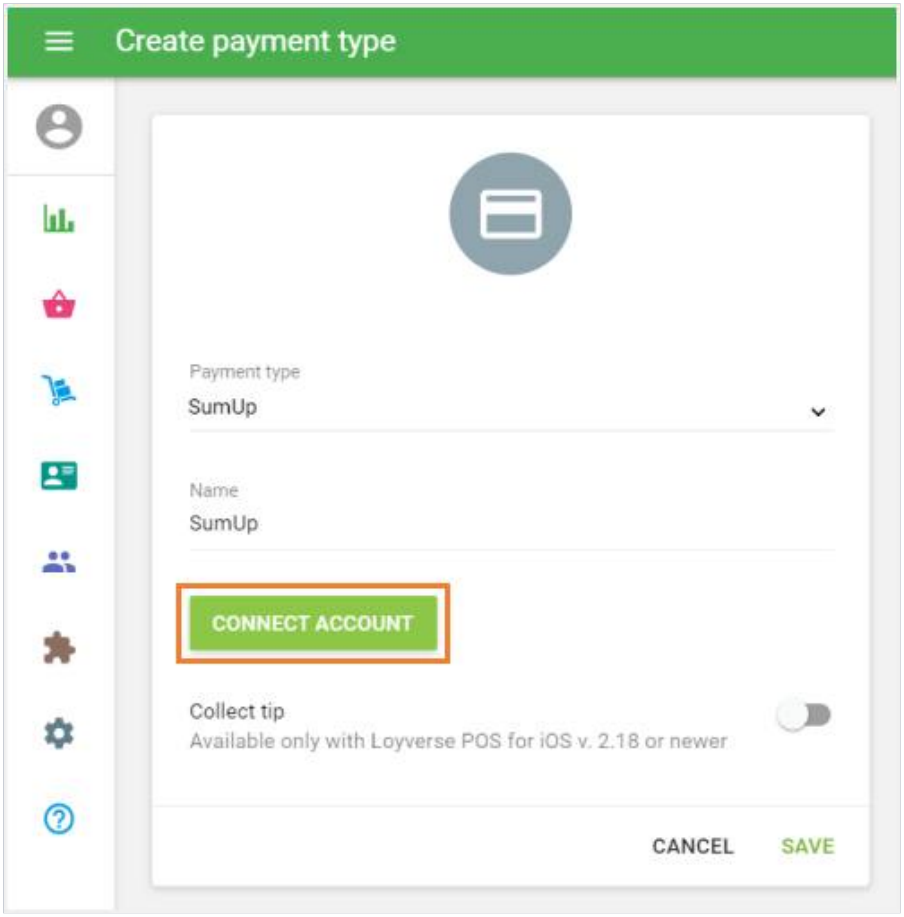
1. Connecting Card Reader

1.1. Creating a payment type

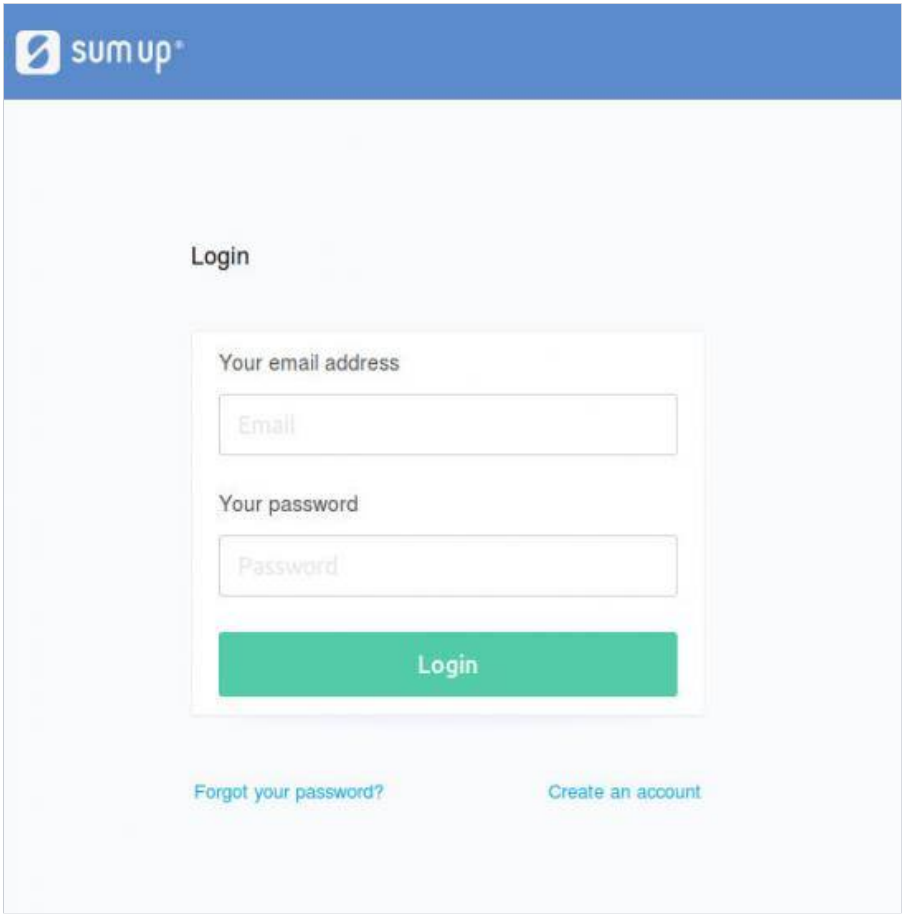
Log in to the Back Office, click the 'Settings' menu and then 'Payment types.' Click the 'Add payment type' button to add a new type of payment.



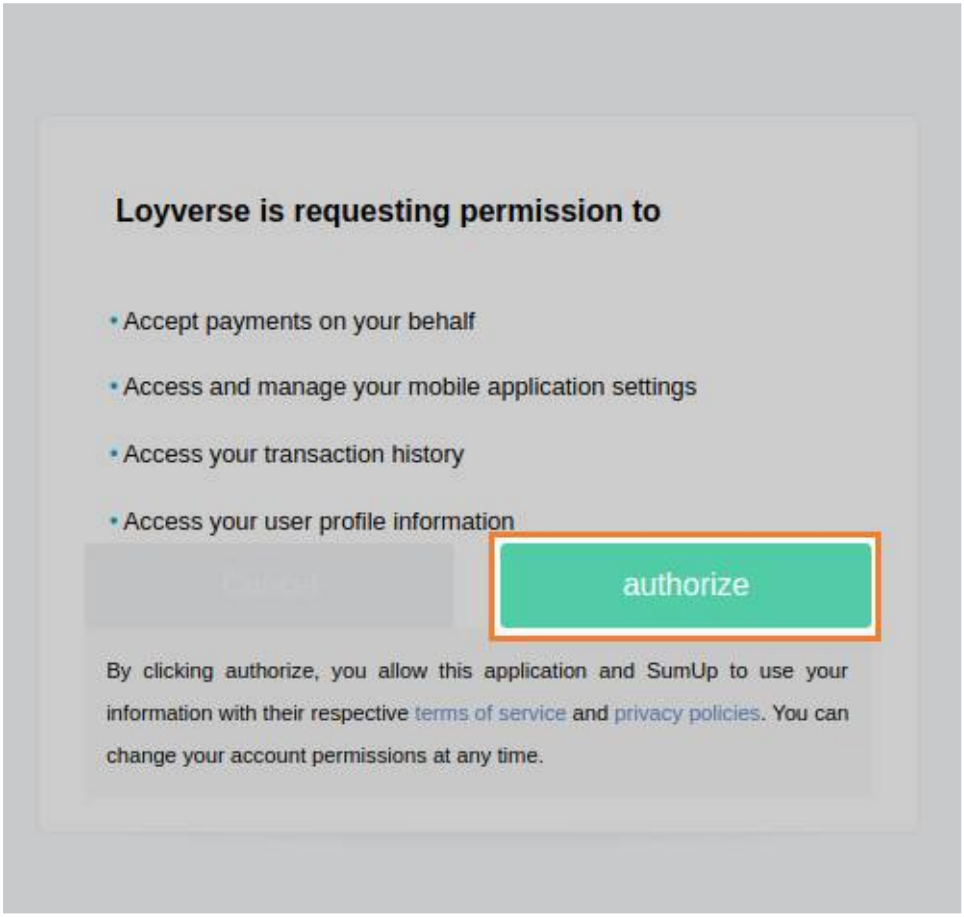
In the Add Payment Type window, select a 'SumUp' payment type from the drop-down list and tap 'Connect account' button.



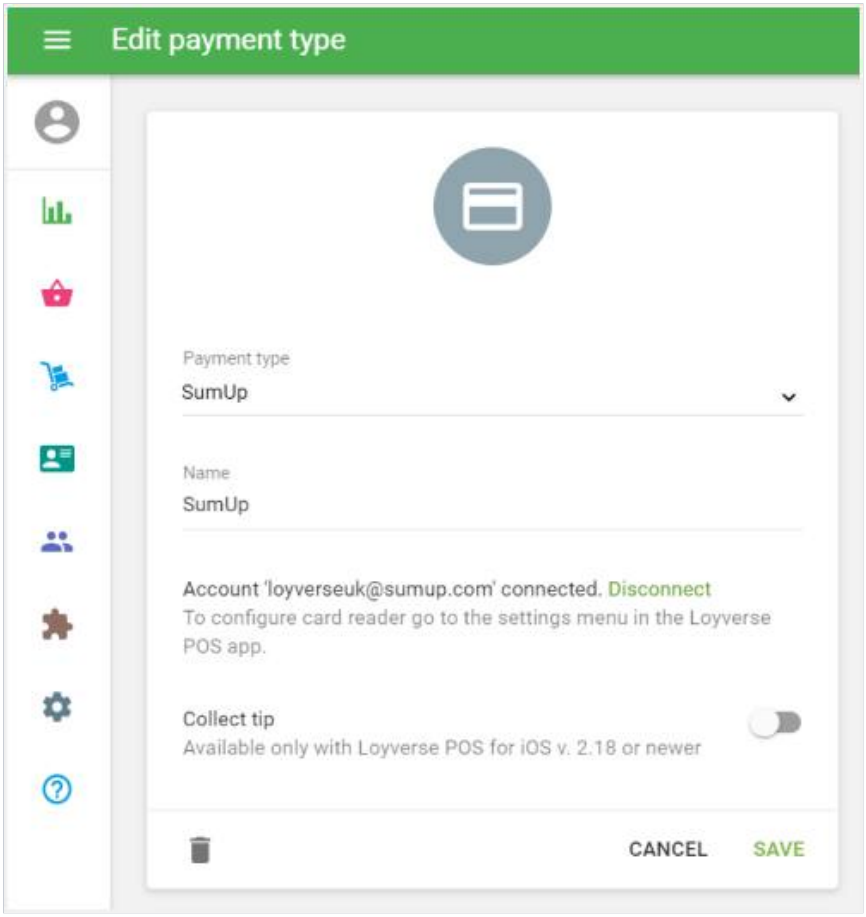
Enter Email and Password from your SumUp account.



Accept permissions request by clicking on ‘authorize’ button.



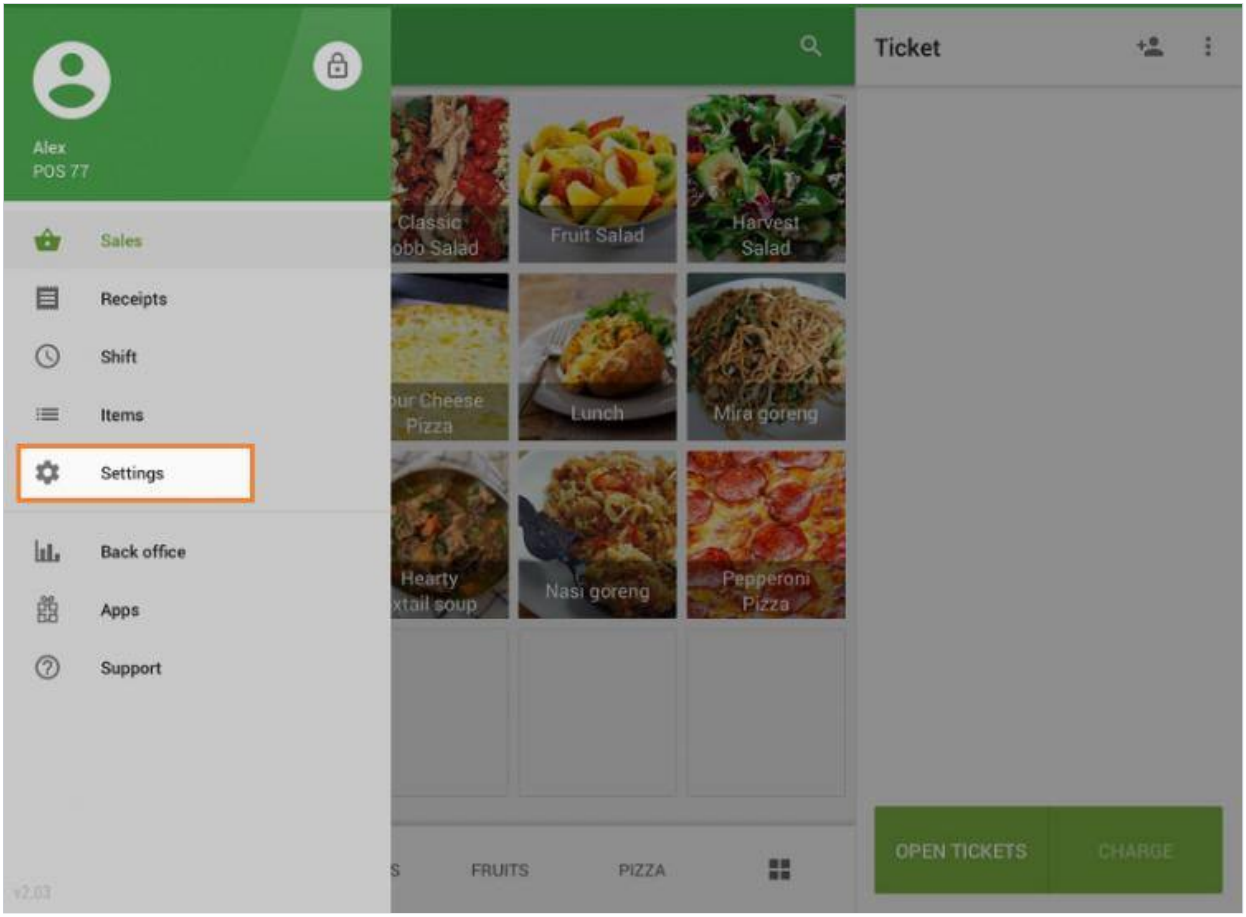
You will see the connected account message, click ‘Save’ button.



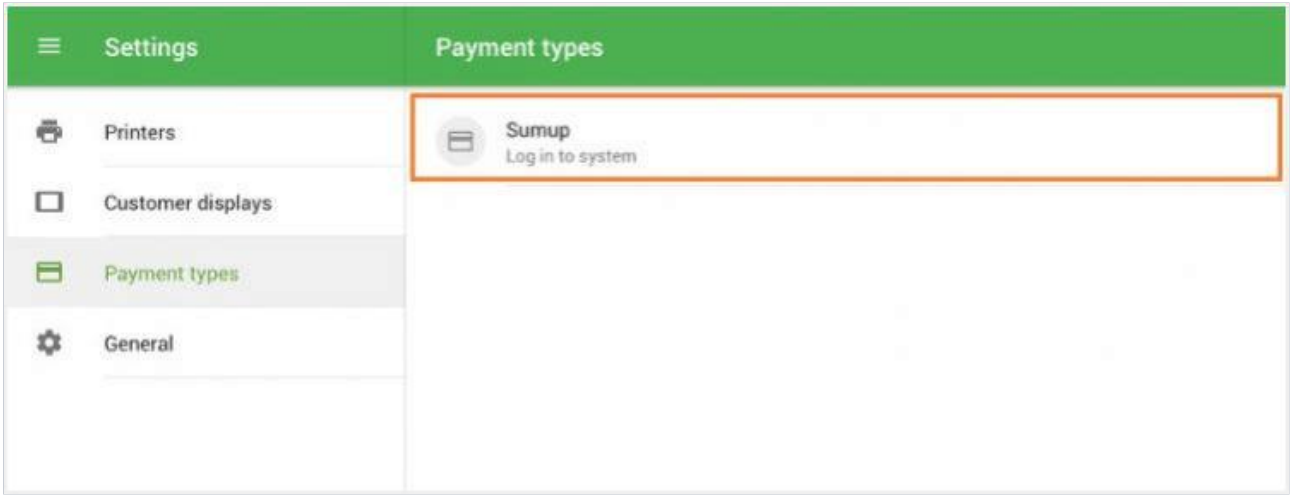
For the card readers Solo and Solo+Printer, remember to switch on the Bluetooth connection in the device settings.

1.2. Connecting with iOS devices

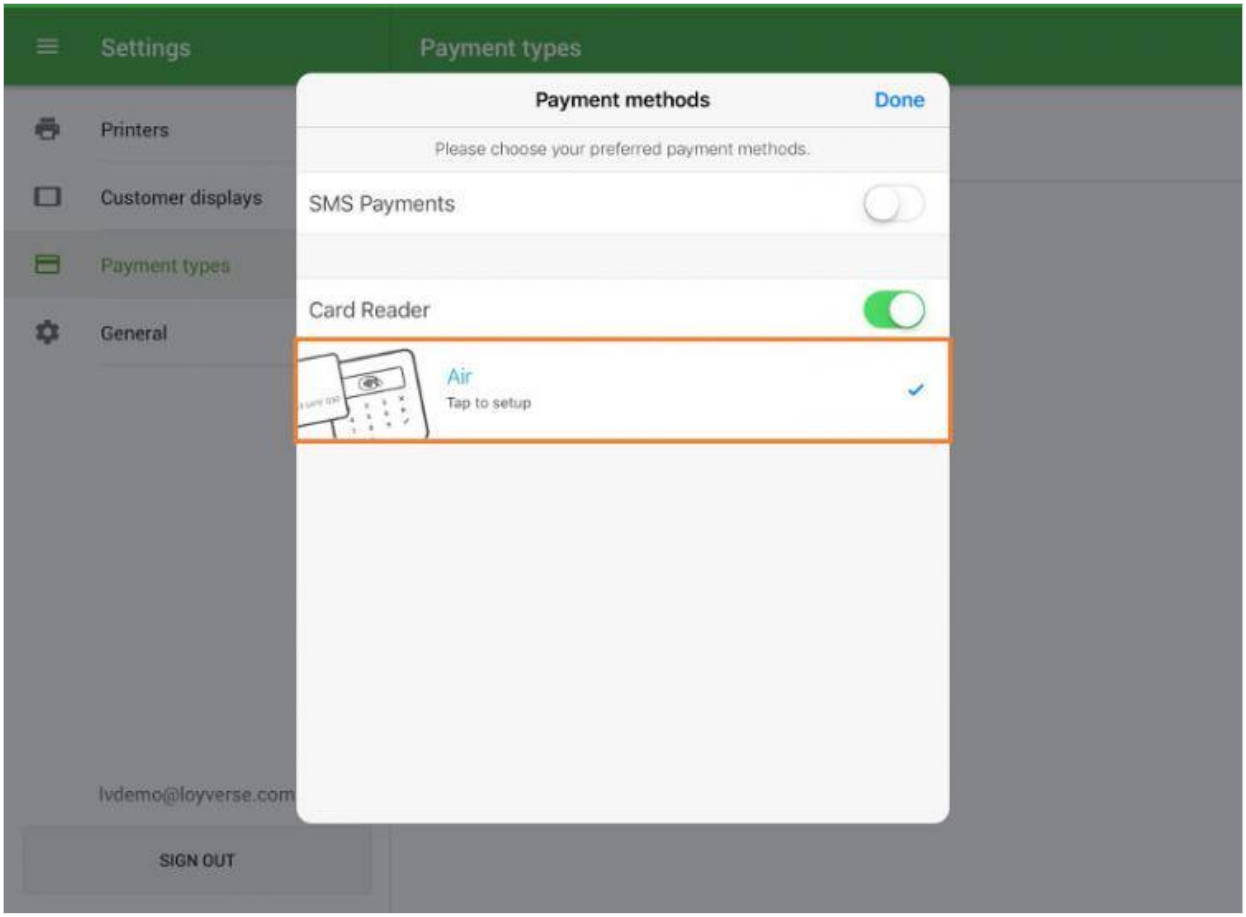
Then launch Loyverse POS and go to Settings > Payment Types.



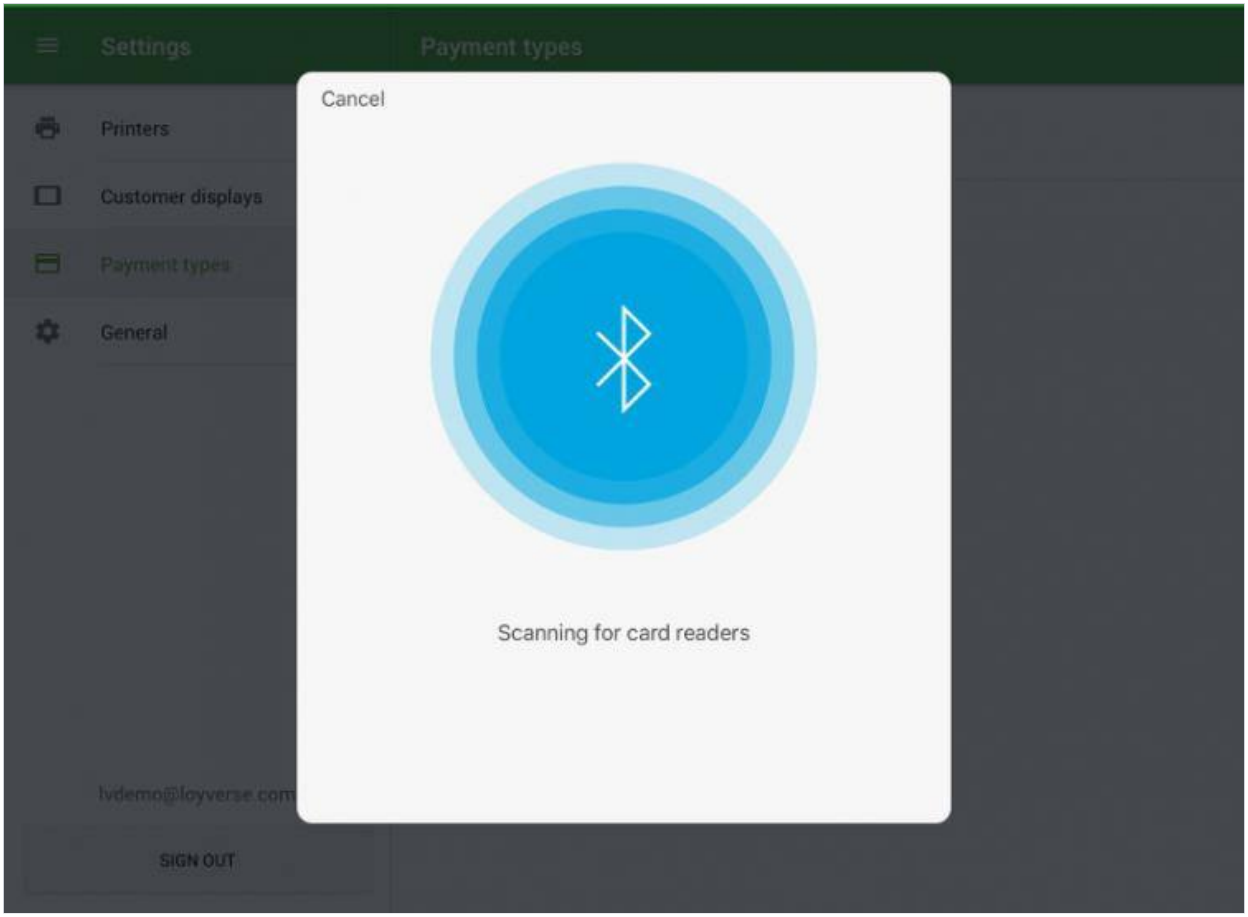
Tap the ‘Sumup’ button for account settings.



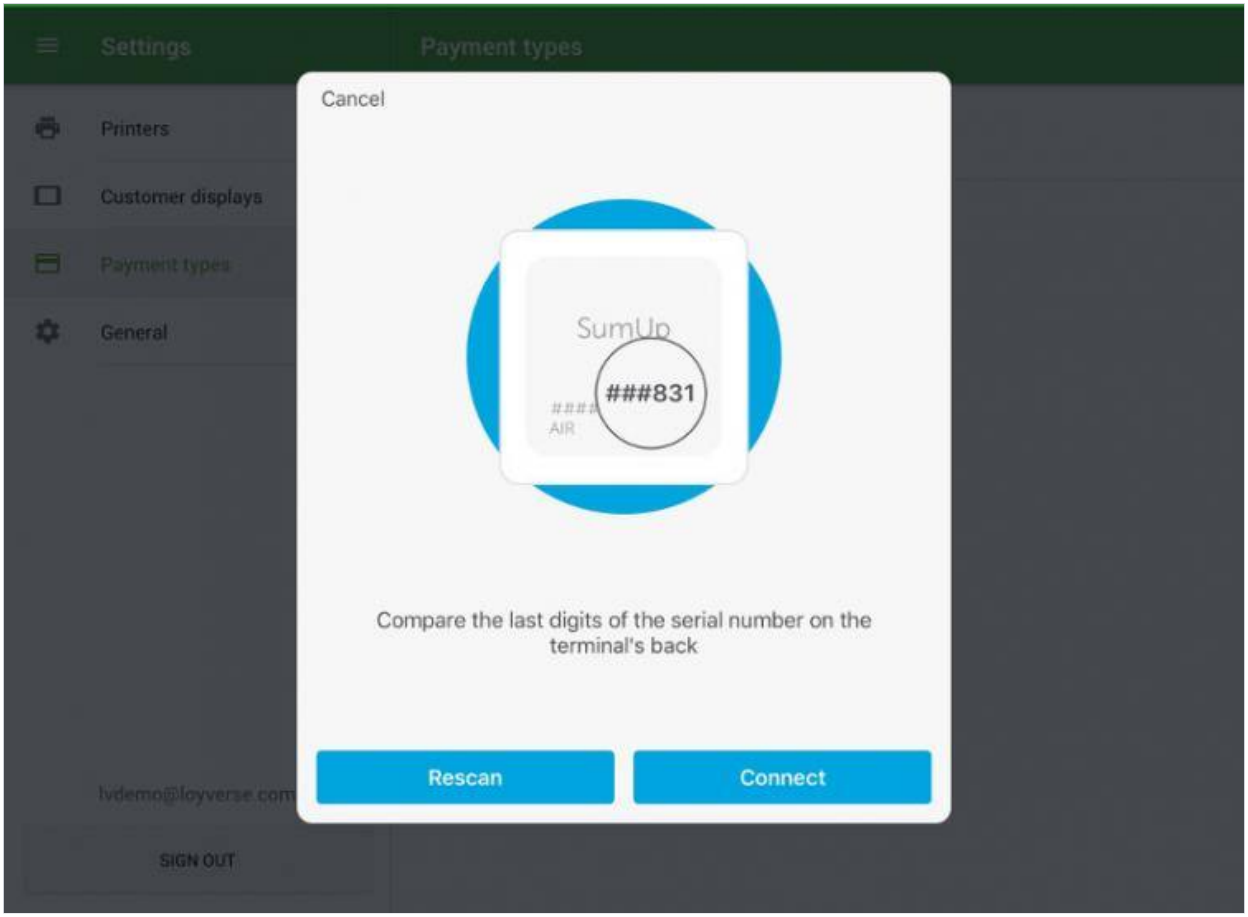
In the ‘Payment methods’ screen, select your card reader for set up.



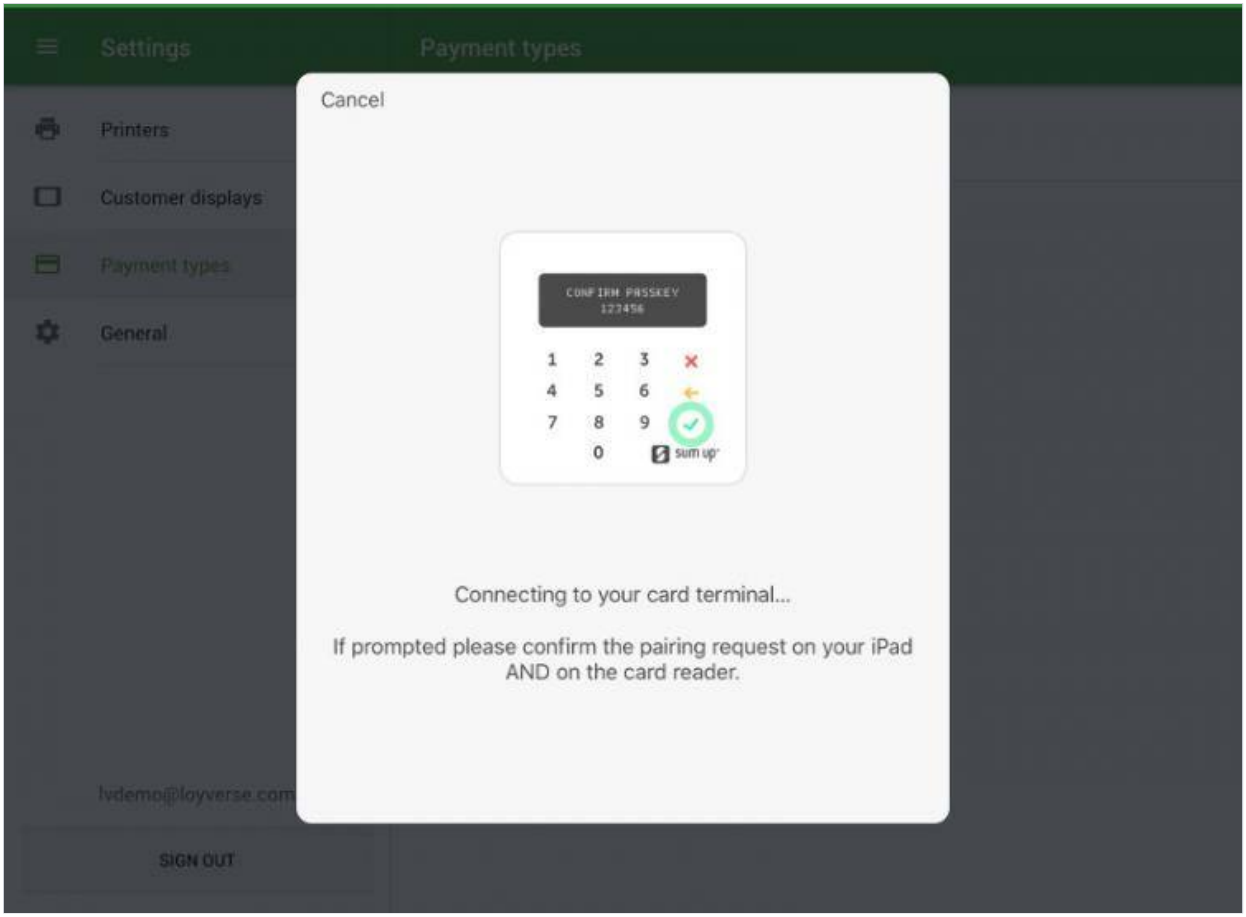
The application will start searching for SumUp card readers.



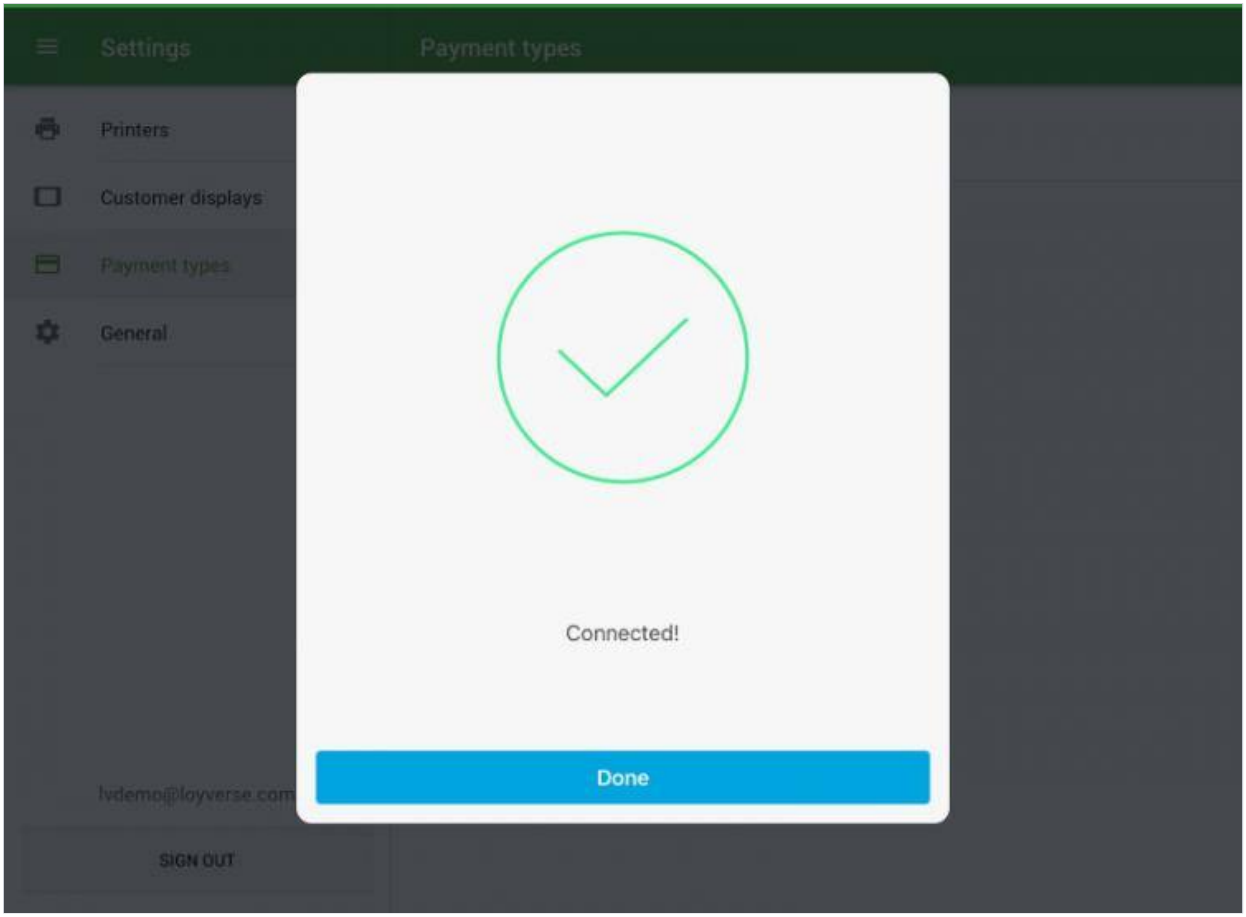
The application will show the last three digits of the found device. Tap ‘Connect’ button.



The application will ask you to confirm the pairing request on your card reader by pressing ‘OK’ button.



After you complete the request, you will see information that the card reader is connected. Tap ‘Done’ button.

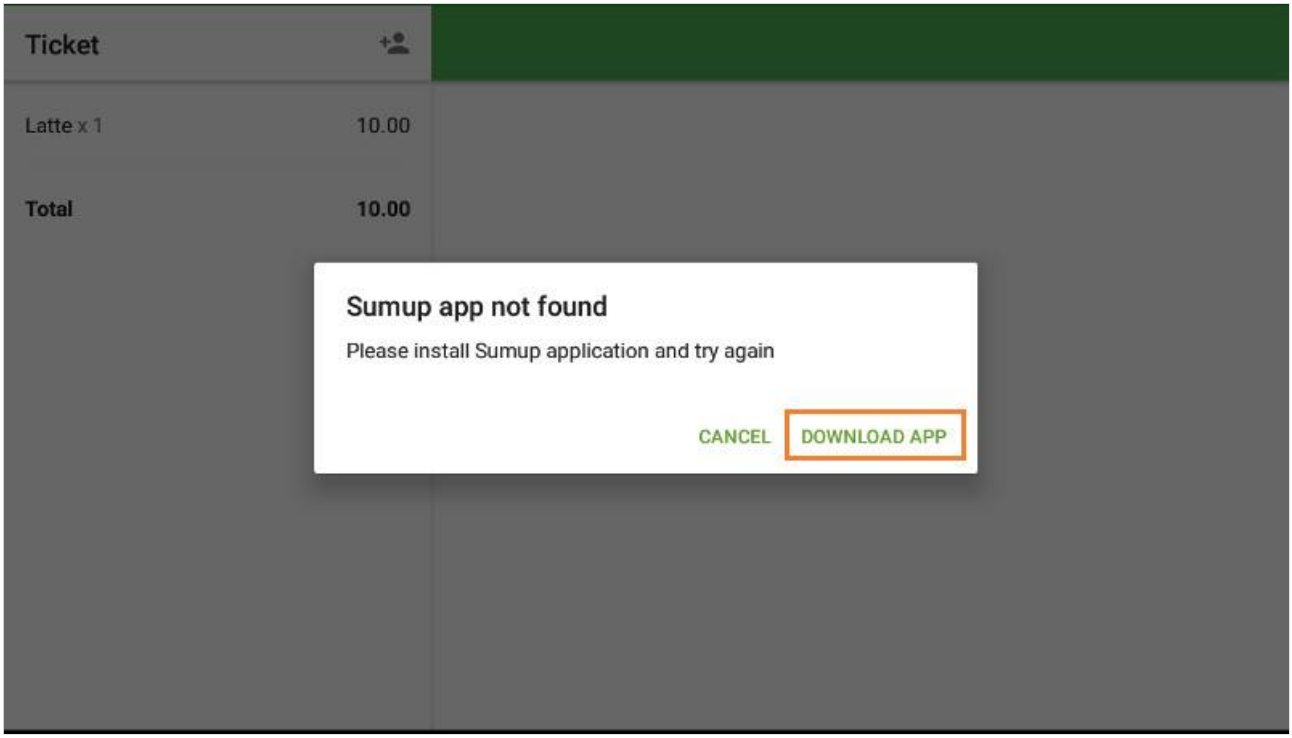


Now you are ready to accept card payments.

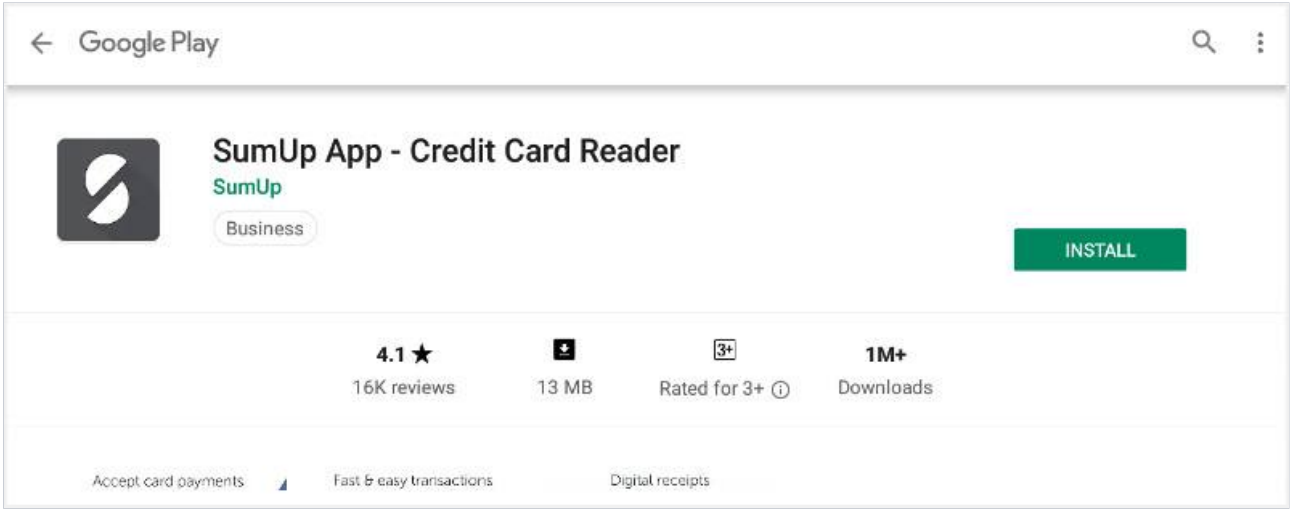
1.3. Connecting with Android devices

To connect SumUp card reader to Android devices, make a test sale and select Sumup payment type.

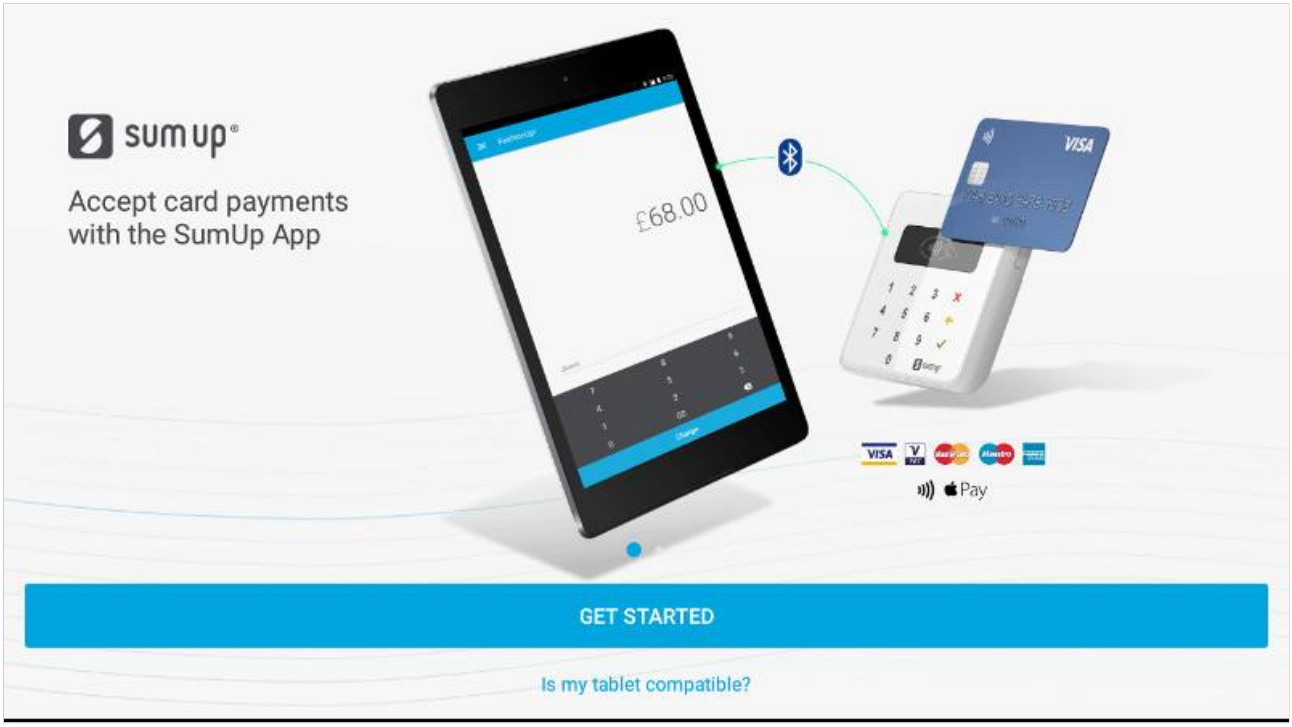
You will see an invitation to download the Sumup app. Tap ‘Download app’ button.



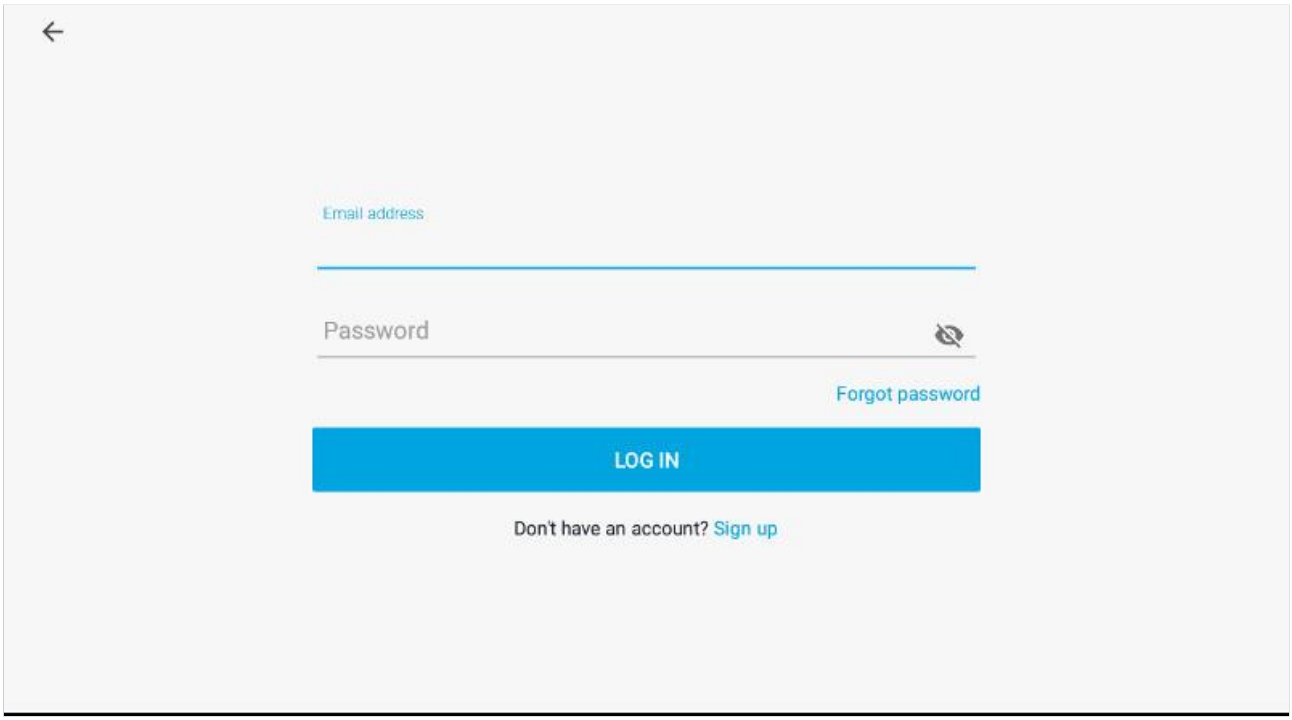
You will be redirected to Google Play to SumUp app. Install the app to your device and launch it.
Note: For using the SumUp App on Android devices, the required operating system is Android 10.0 or higher.



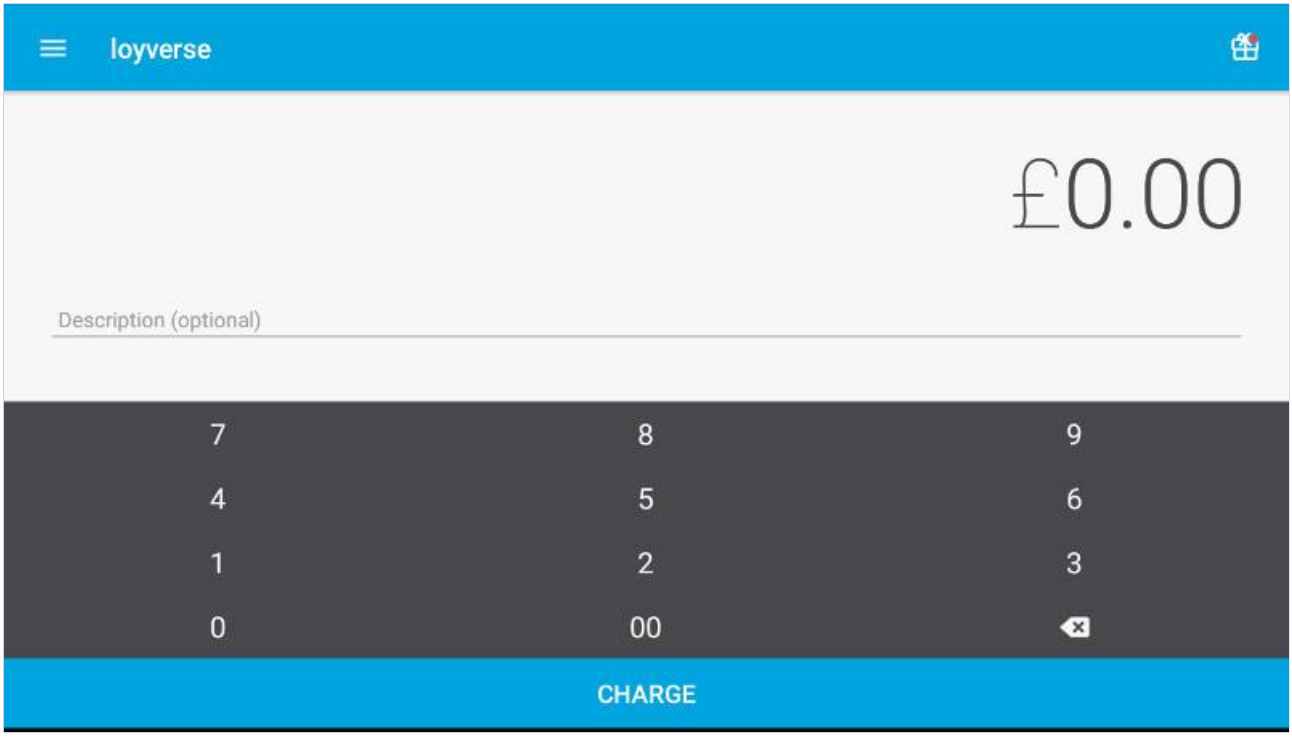
You will see the welcoming screen of SumUp app. Tap the ‘Get Started’ button.



Enter Email and Password from your SumUp account.



You will see an invitation to make a payment through SumUp app.



Now you can close this app and go to accept payments through Loyverse POS.

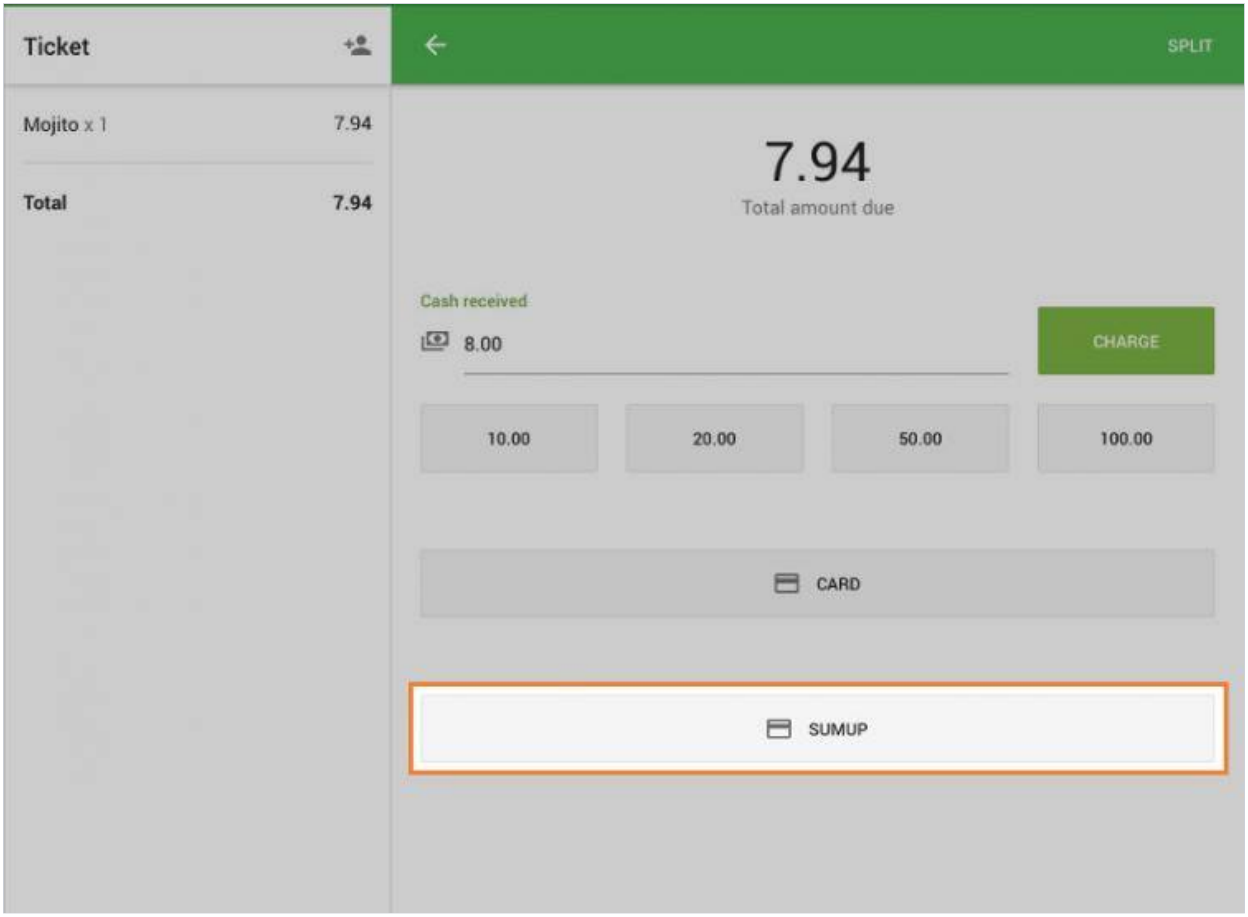
Note: SumUp works only with mobile devices which turned on geolocation.

2. Processing Payments

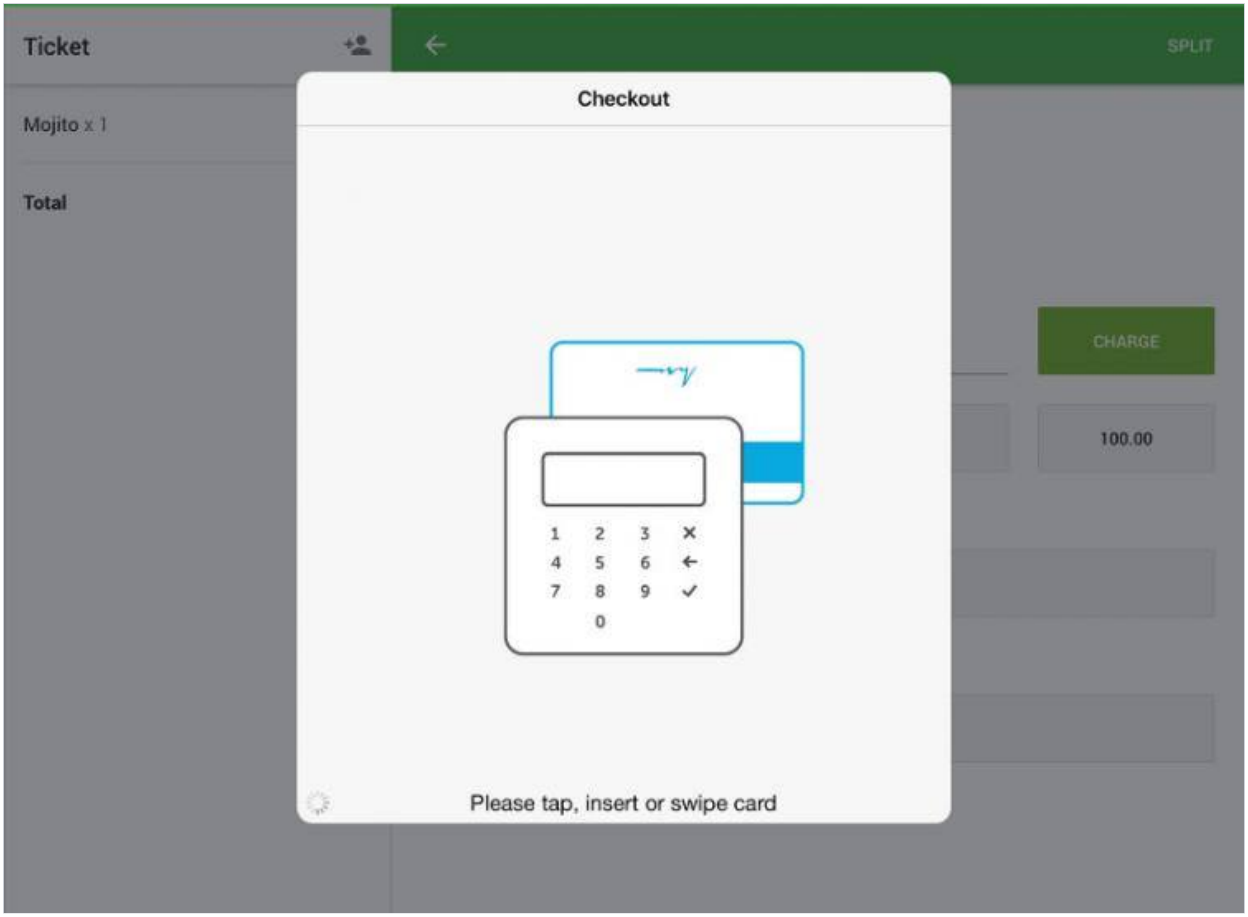
Payment

Add items to the ticket and press ‘Charge.’

Select the SumUp payment type.



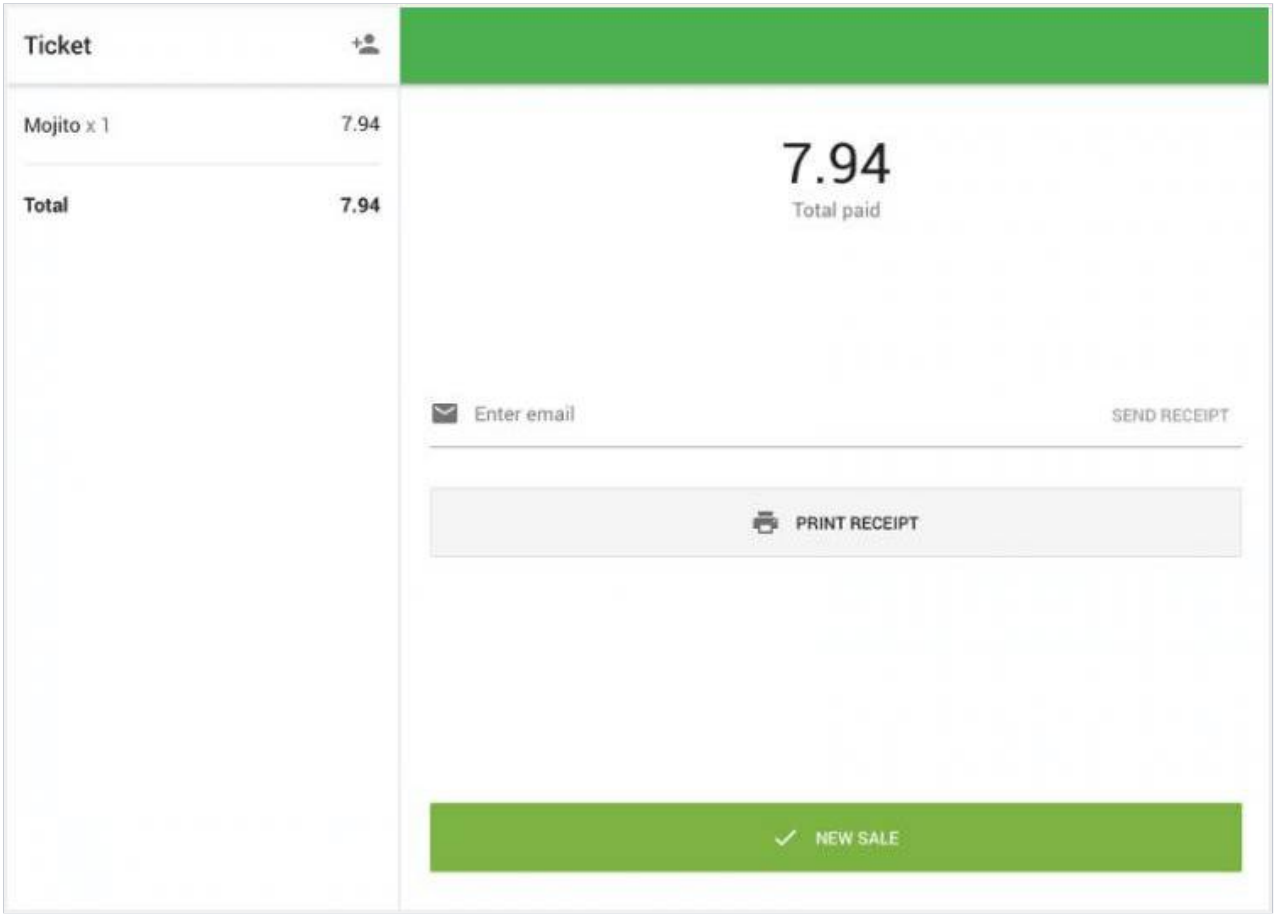
Loyverse POS will wait for a response from the card reader, and you will see an invitation to tap, insert or swipe a card on the card reader.



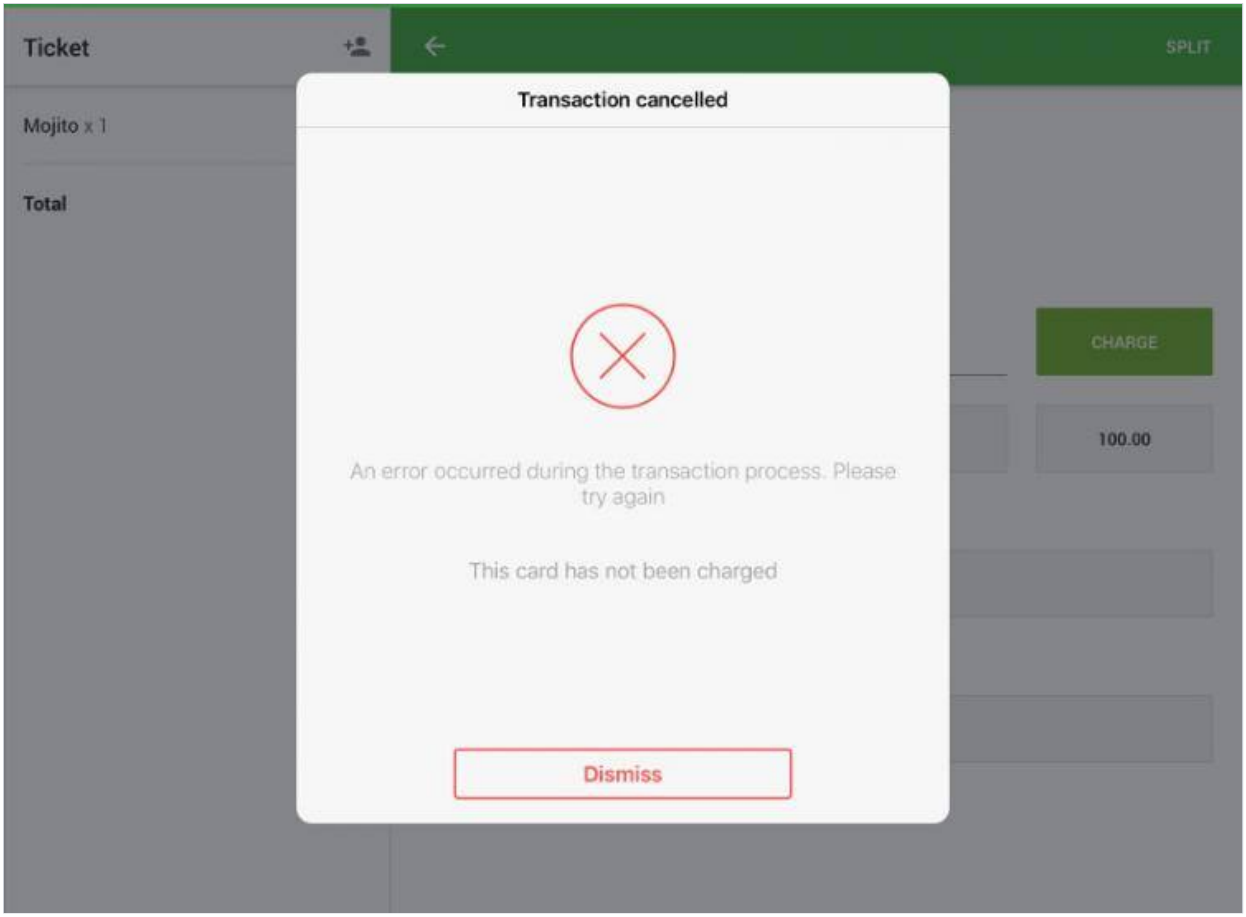
Tap, insert, or swipe a customer's card on the card reader. If the card needs the pin entry, give the card reader to a customer to do that. If a card needs a signature, let the customer sign on the iPad’s screen.

Tap ‘Pay’ button.

If the transaction is successful, Loyverse POS will display the final screen with the paid amount.



In case of an error in the transaction, Loyverse POS will show an error message.



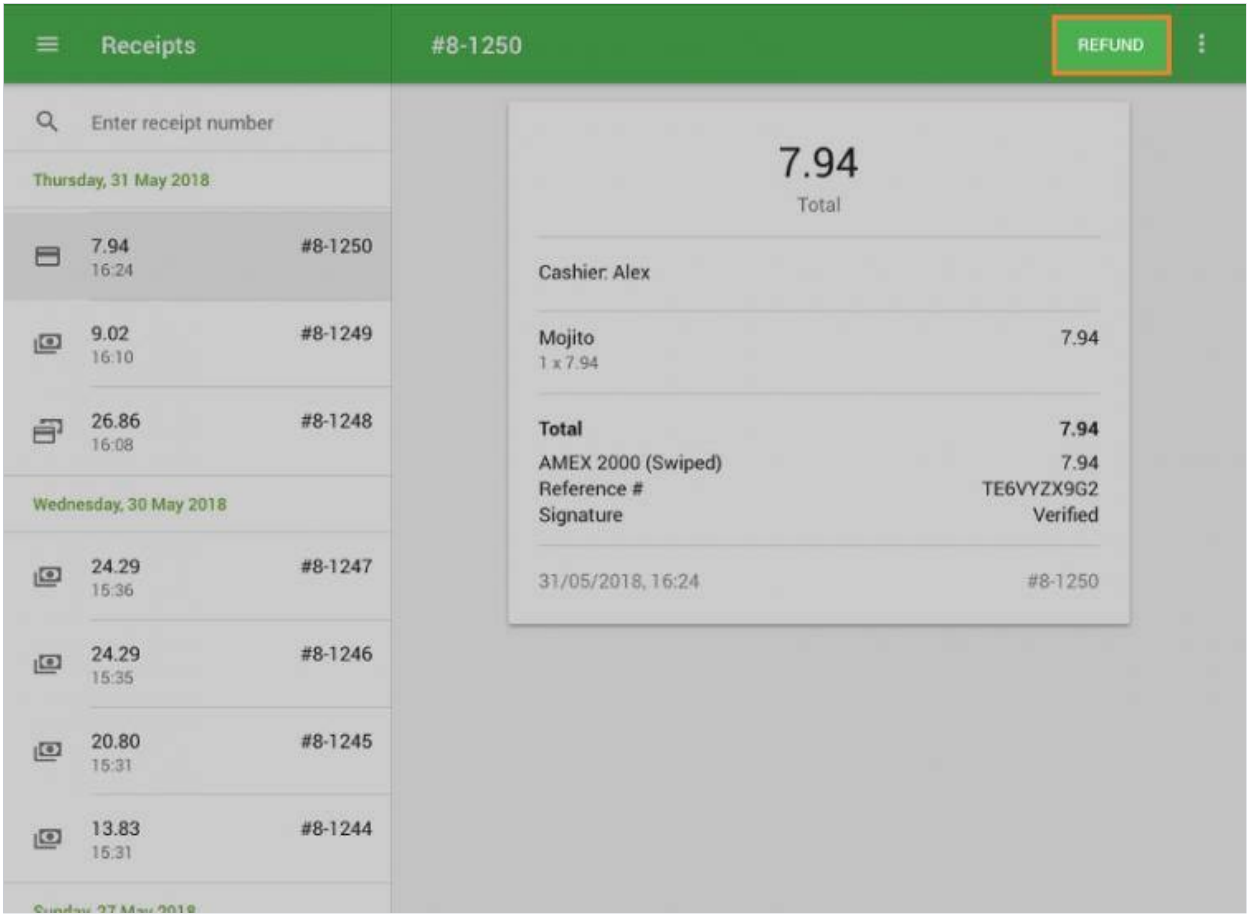
Tap ‘Dismiss’ button, and you will return to selecting payment type screen. You can ask the customer to choose a different type of payment (for example ‘Cash’) or try another card.

Refund

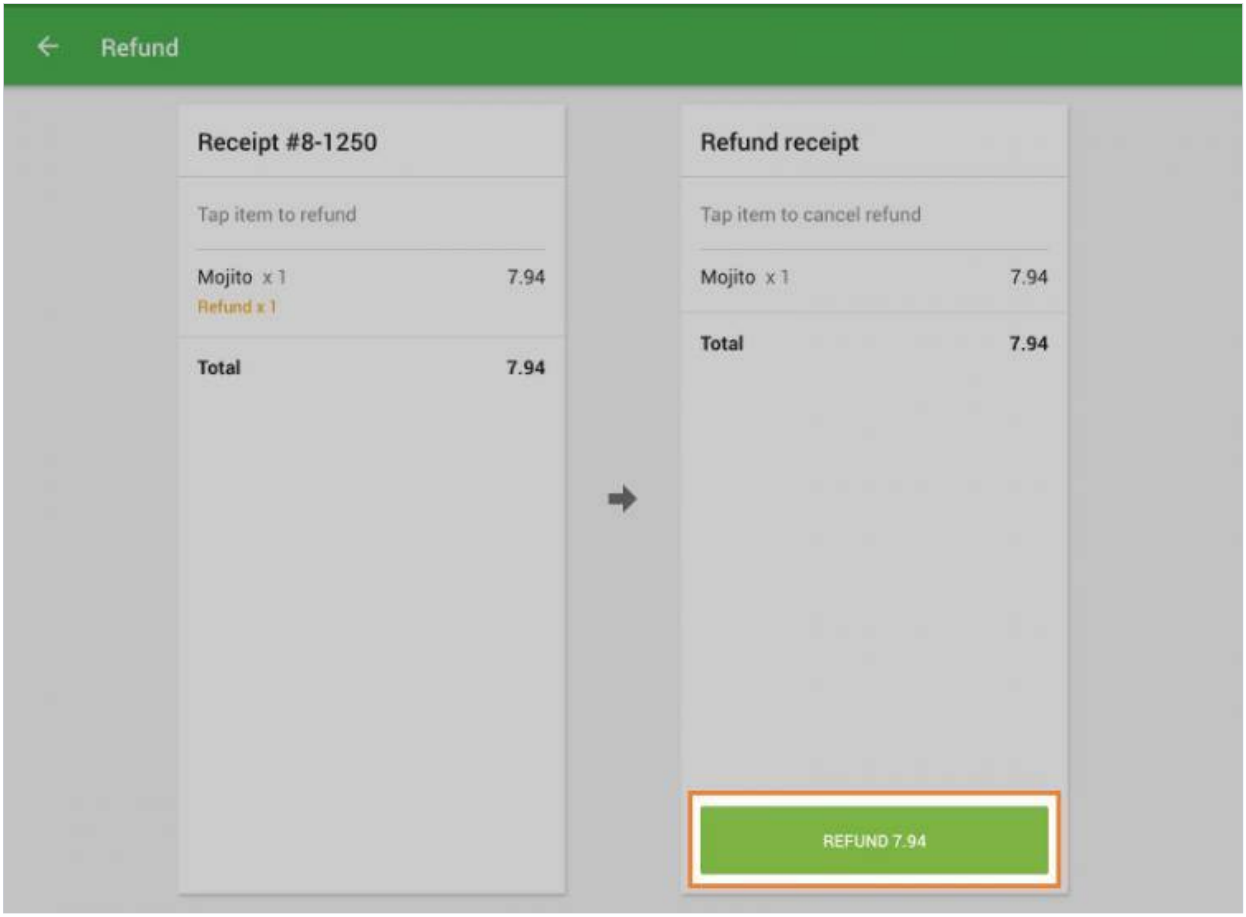
You can only refund the whole amount of card transaction. The card reader is not used in the refund process.

At Loyverse POS go to ‘Receipts’ menu, and tap the needed receipt.

Tap ‘Refund’ button.

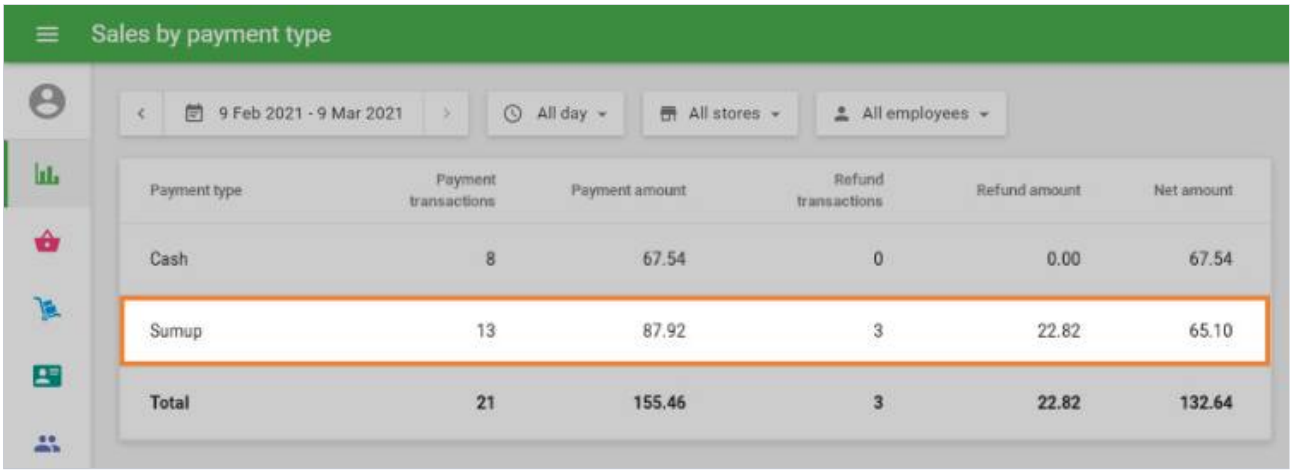


Select all items of the card payment from the left ticket to move them to the right-side ‘Refund receipt’ list and tap ‘Refund’ button.



3. Reports

You can view the total number of transactions performed with the SumUp payment type. In the back office, select the ‘Sales by payment type’ report.



See also:

[Configuring Payment Types in Loyverse POS]

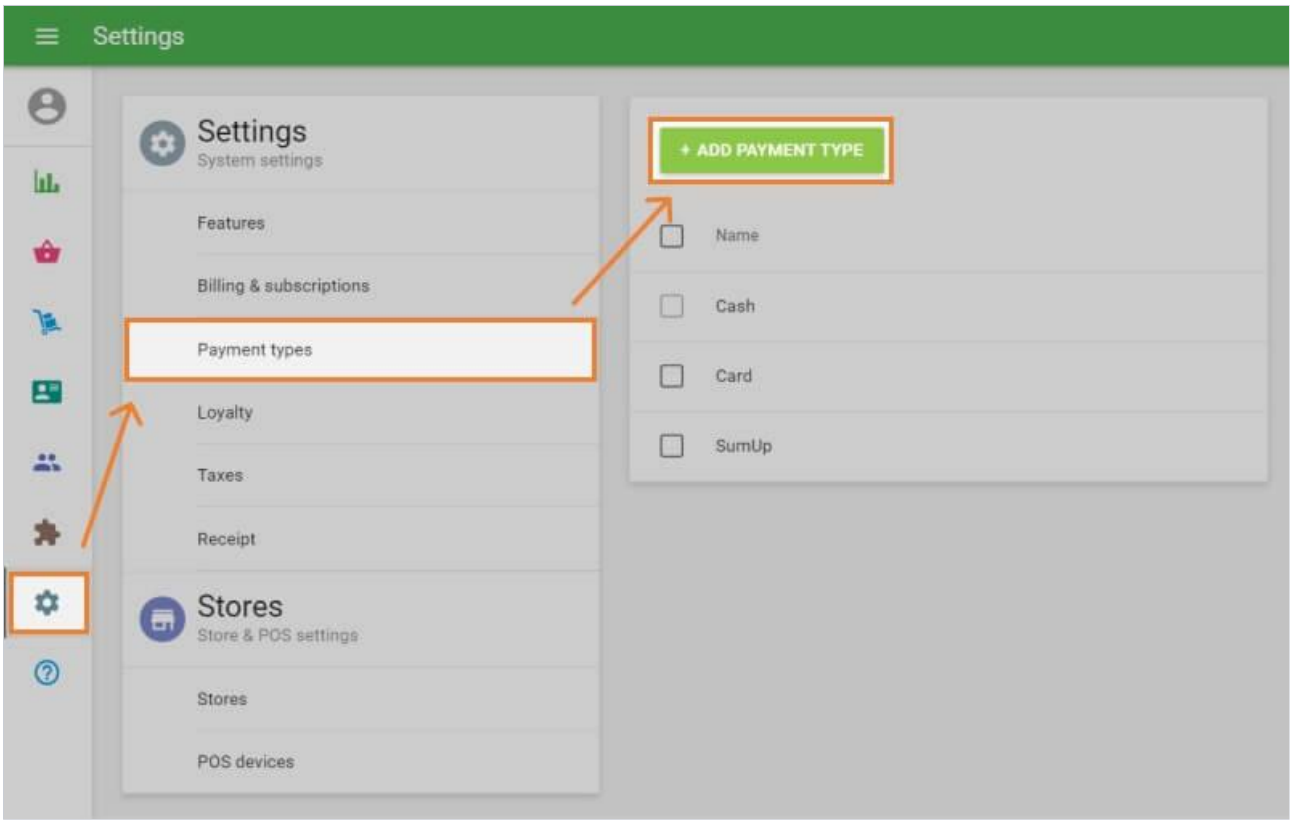
How to Accept Card Payments with Loyverse POS and Teya

Loyverse POS merchants in **the United Kingdom, the Czech Republic, Iceland, Italy, and Spain** can accept card payments through Teya. To get started, you'll need to register with Teya and receive a payment terminal.

1. Connecting Your Teya Account

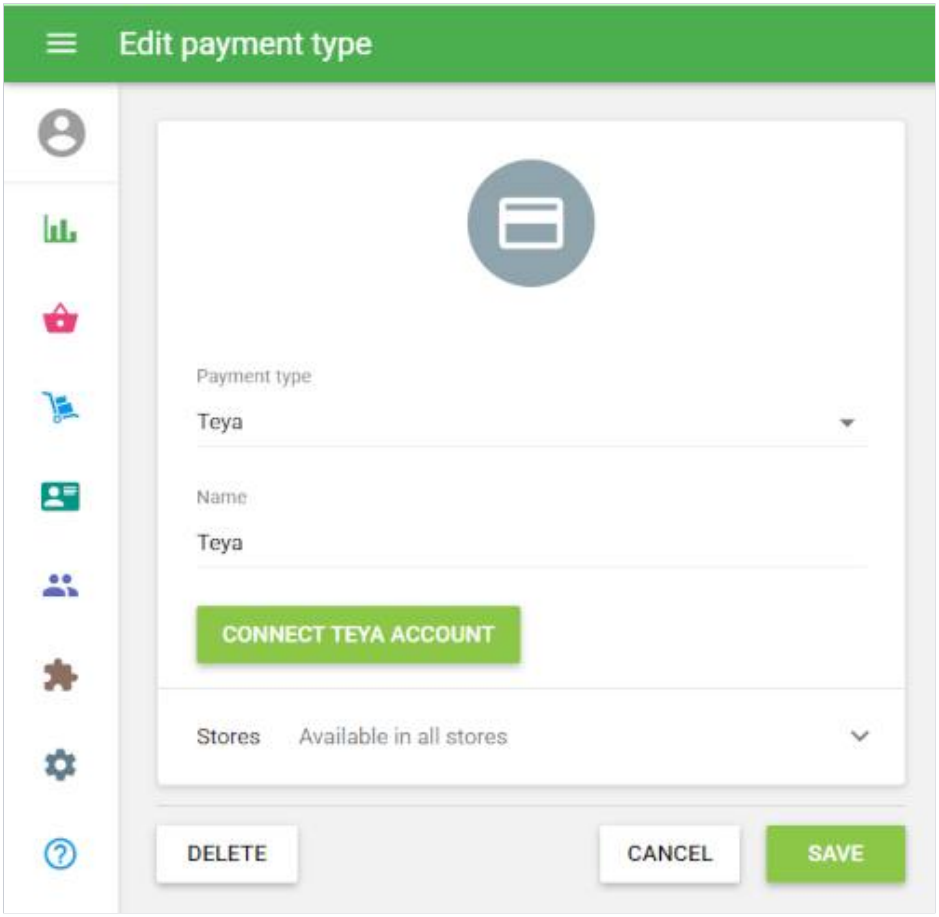
Log in to your **Back Office**.

Go to **Settings > Payment types**.



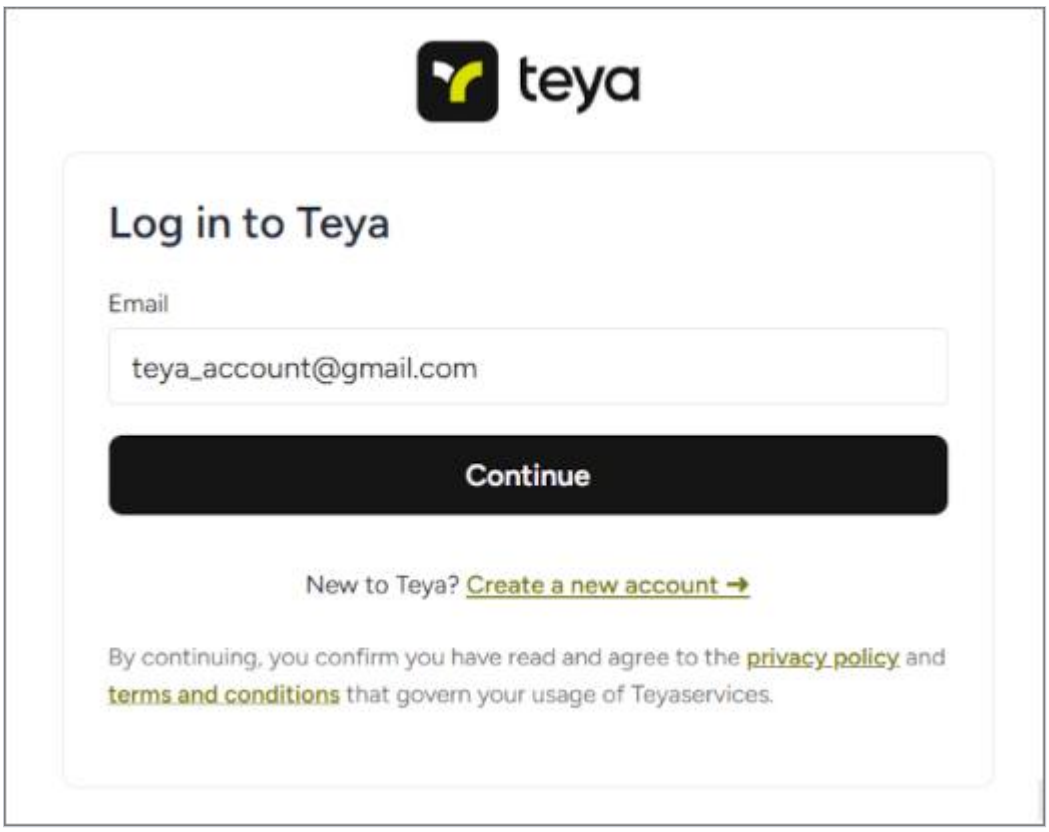
Click the '**Add payment type**' button.

From the drop-down list, select '**Teya**'.

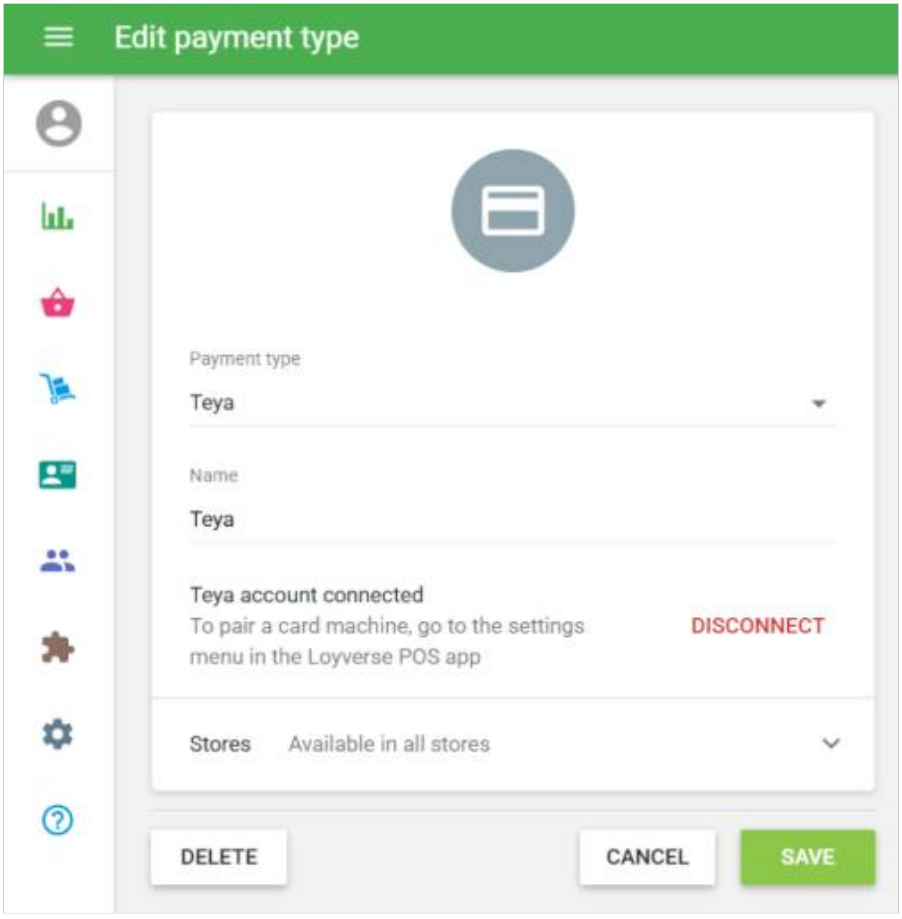


Click '**Connect Teya account**'.

On the Teya login screen:
Enter your **email and password** to connect your Teya account.



Once connected, you'll see a confirmation in the Back Office.

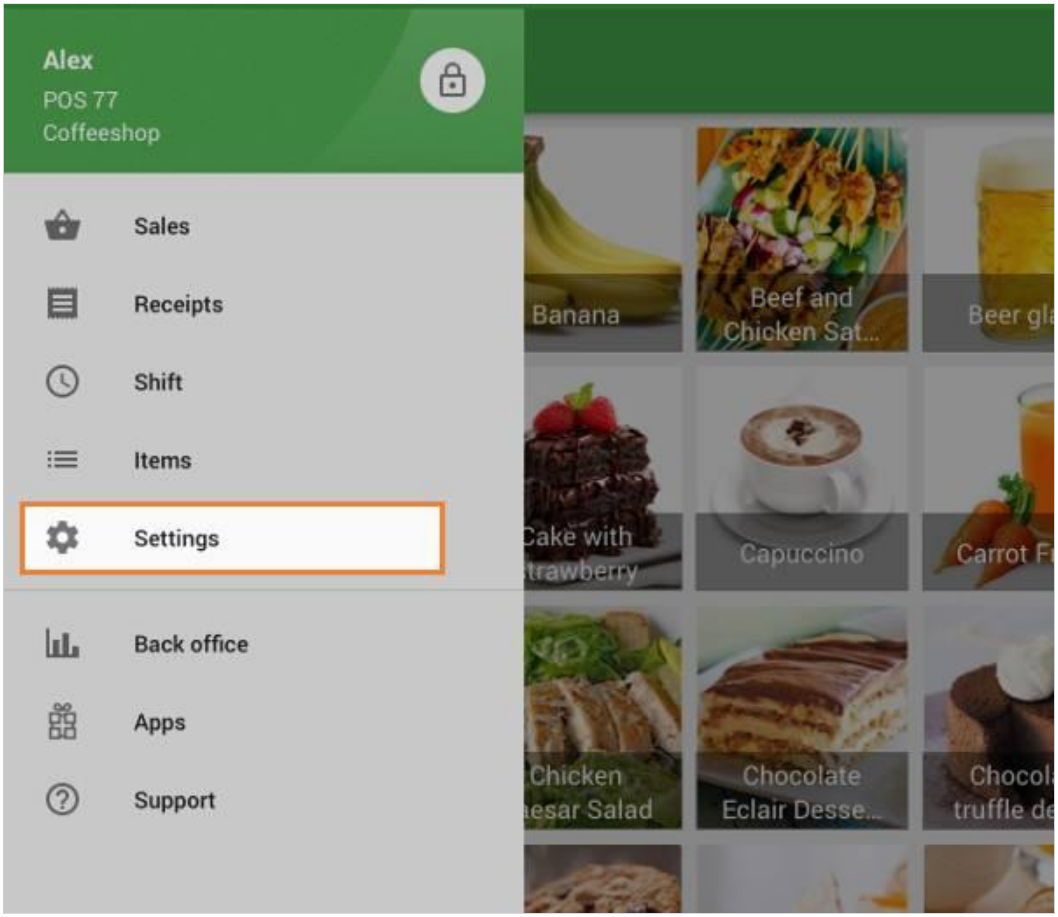


Note: If you disconnect your Teya account, all paired terminals will be unpaired from the POS devices.

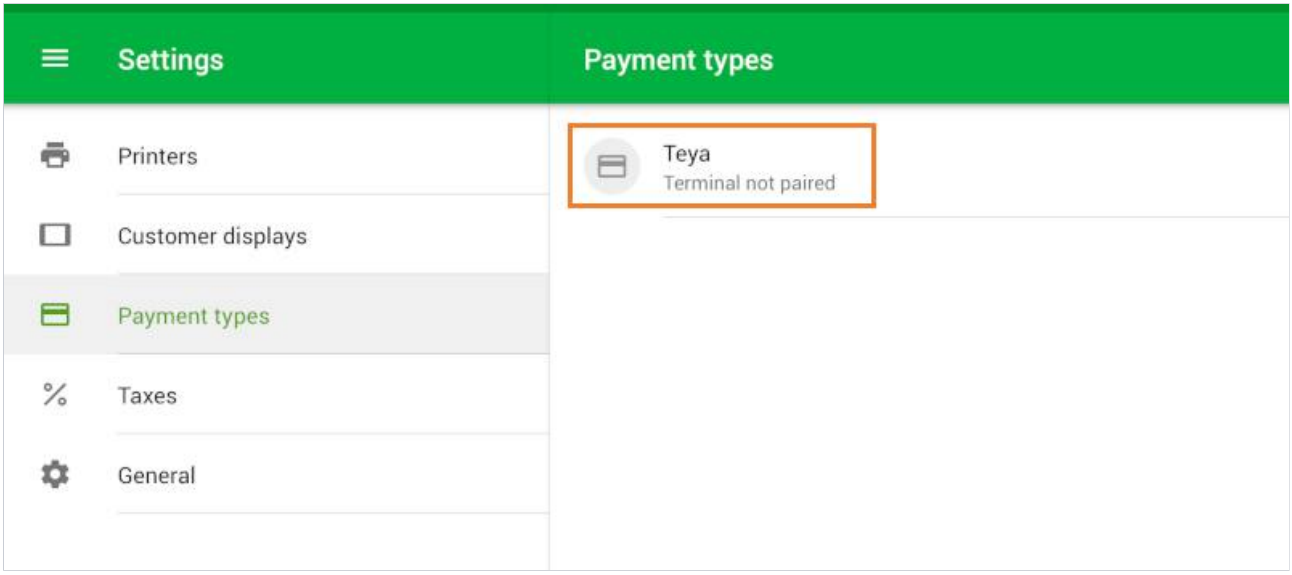
2. Connecting a Terminal to Loyverse POS

Open the **Loyverse POS app.**

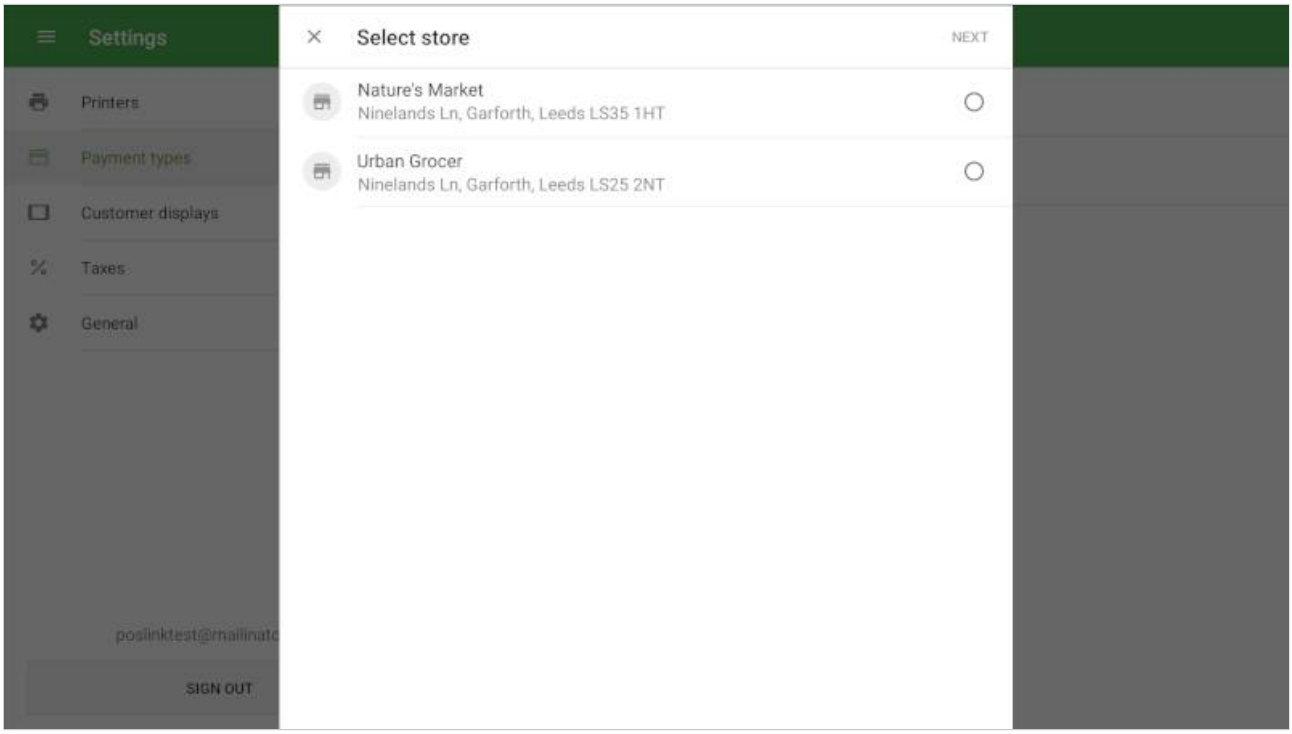
Go to **Settings > Payment Types**.



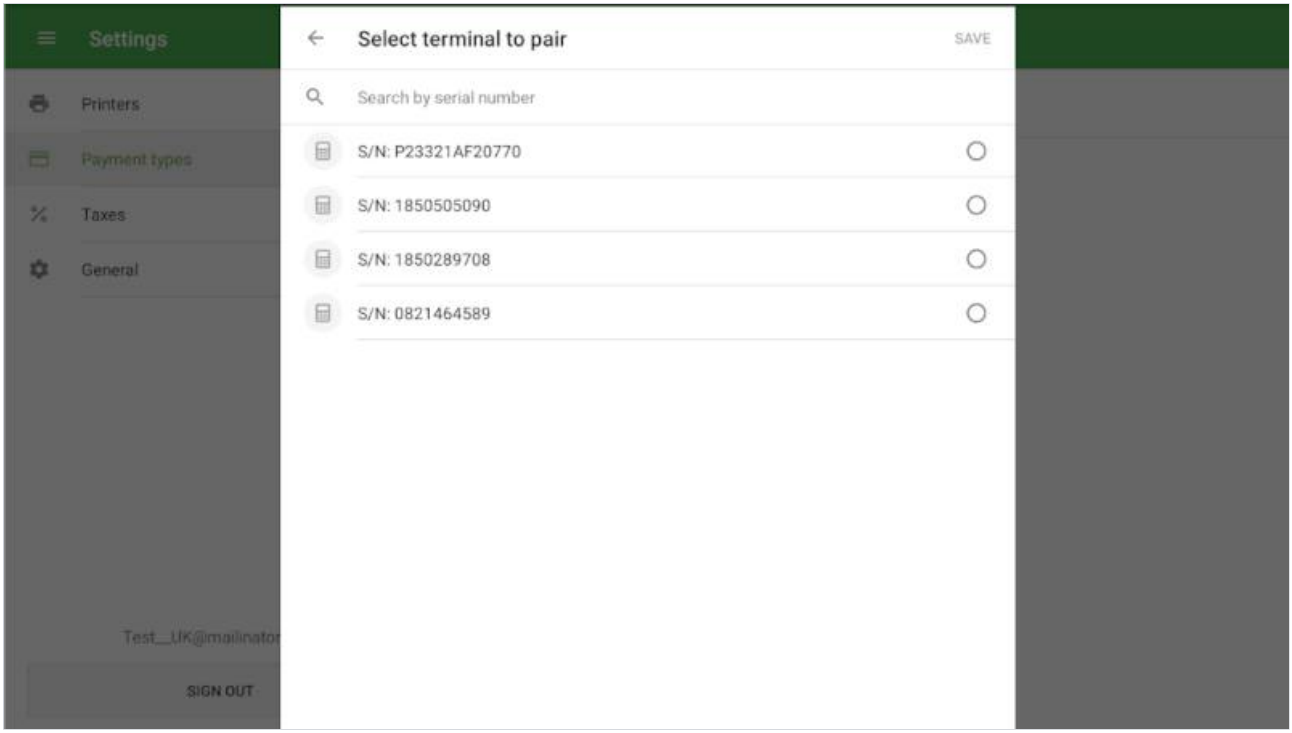
Tap on the **Teya** payment type to begin pairing.



If your Teya account includes multiple stores, select the appropriate one and tap '**Next**'.

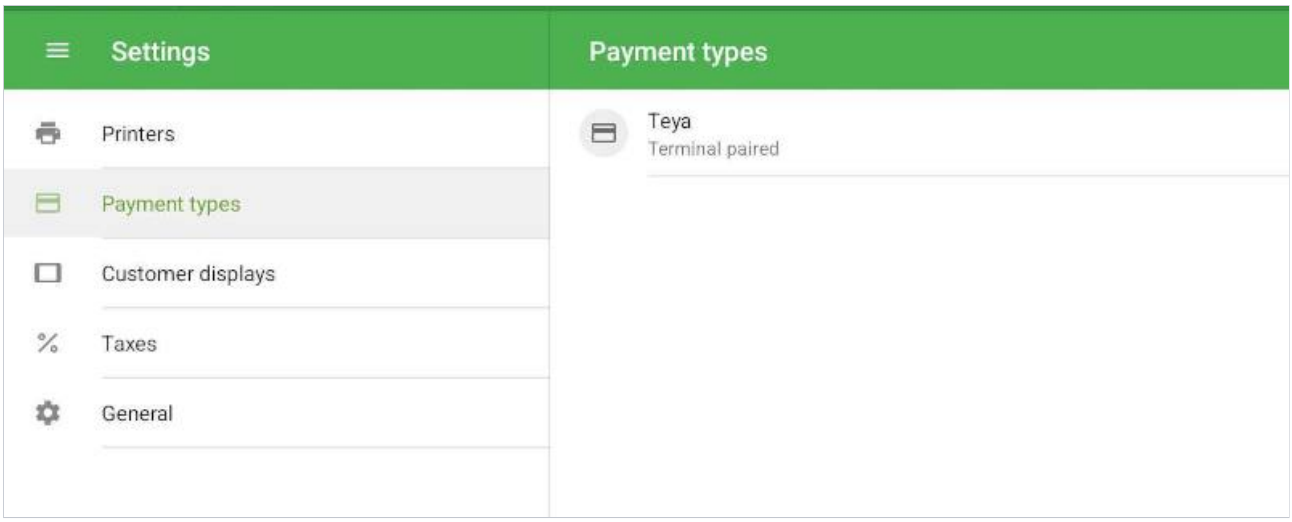


Choose a terminal from the list or search by **serial number**.



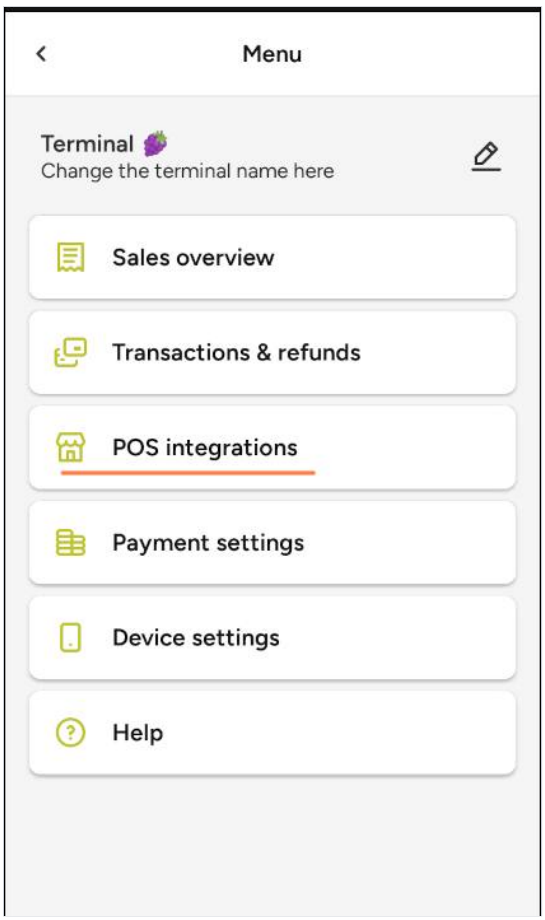
Tap '**Save**'.

The pairing status will appear next to the Teya payment type in the list.

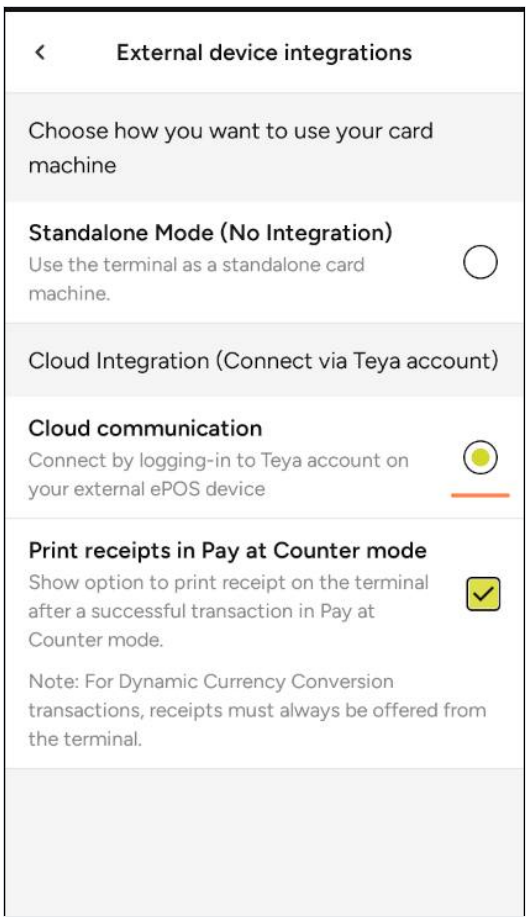


3. Configuring the Teya Terminal

On your Teya terminal:
Open the **Menu > POS integrations**.



In **External device integrations**, ensure '**Cloud communication**' is selected.



Optional:
Enable '**Print receipts in Pay at Counter mode**' if you want the option to print the merchant receipt after a transaction.

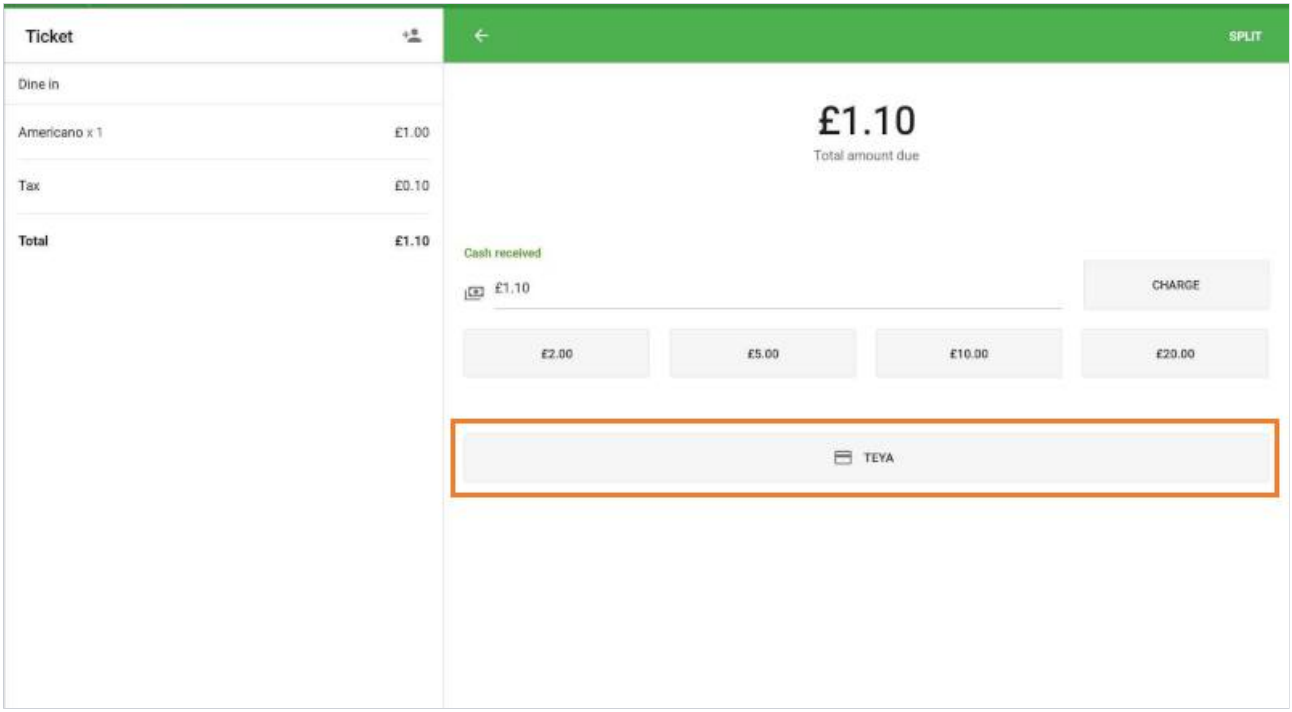
4. Processing Payments

Ensure the Teya terminal is connected to the Internet via Wi-Fi.

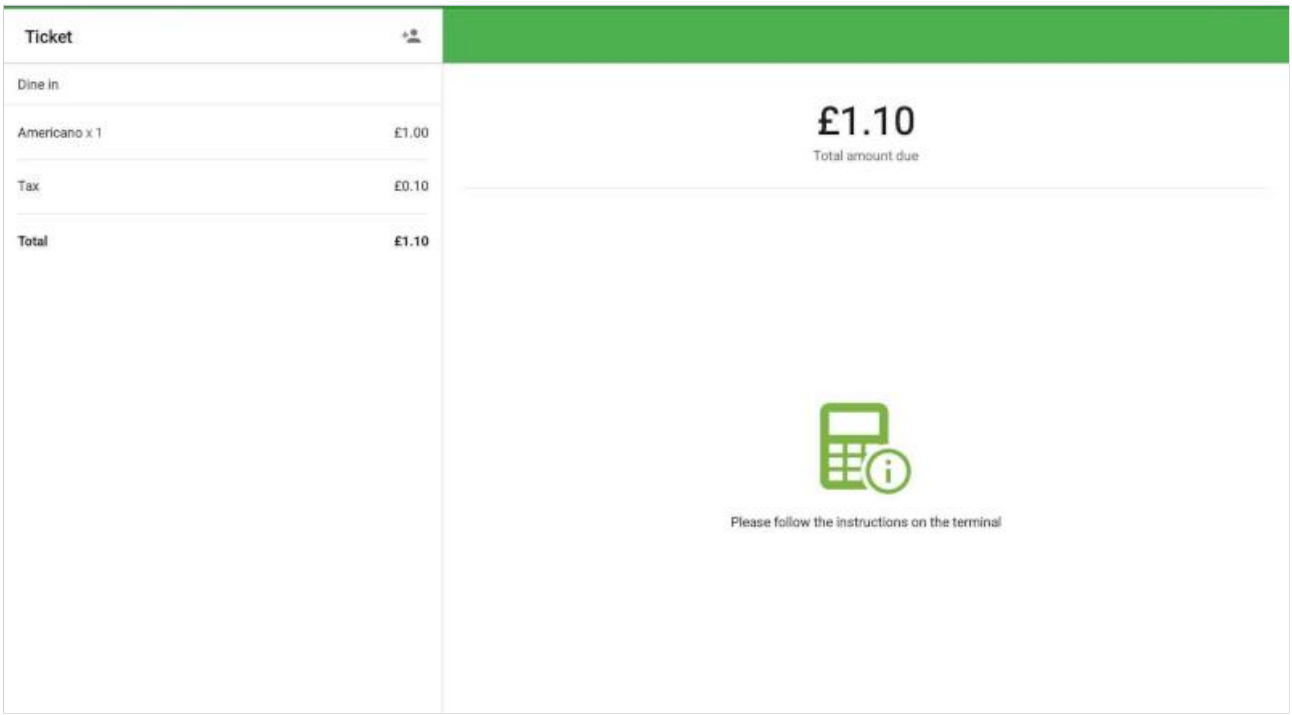
To Accept a Card Payment:

Add items to the ticket and tap '**Charge**'.

Select **Teya** as the payment method.



The terminal will prompt the customer to **insert, swipe, or tap** their card.



If the payment is successful:

- Loyverse POS will show the **Total paid** amount.
- You can **print** the receipt, **email** it to the customer, or start a n**ew sale**.

If the transaction fails:

- A message will display on the POS.

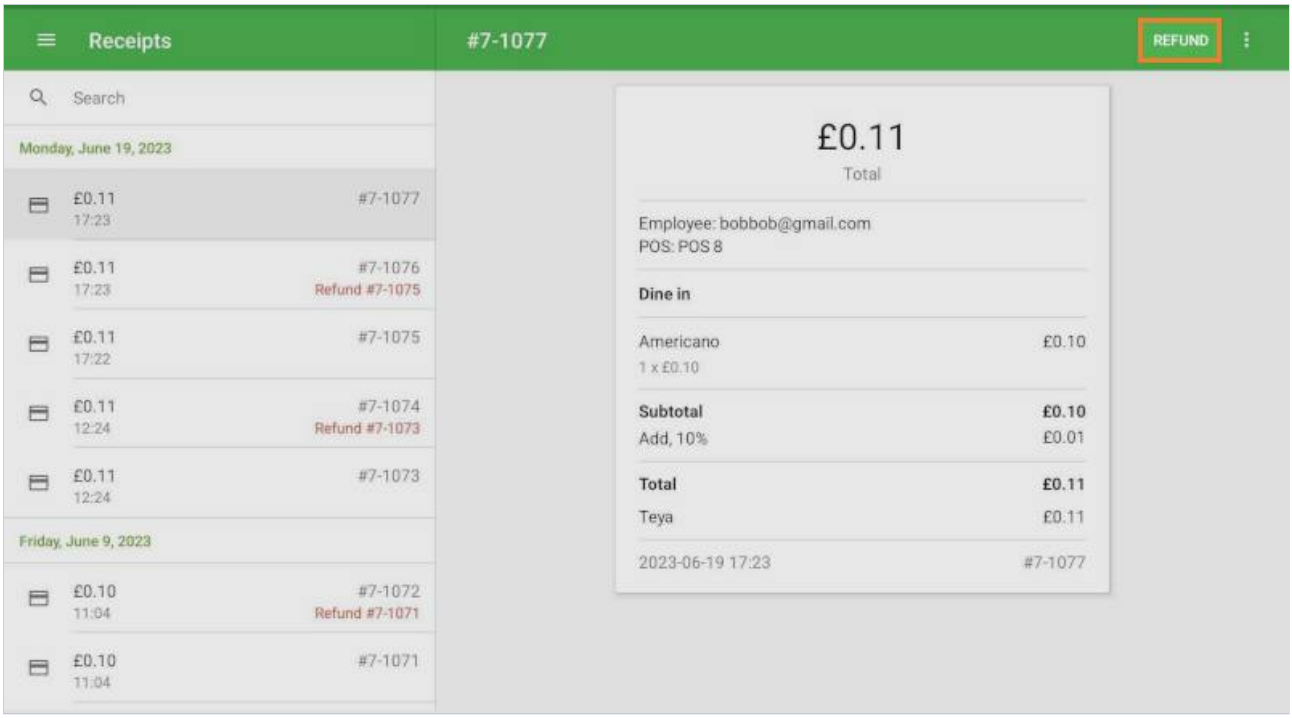
- You can return to the **payment type selection** screen to retry or choose an alternative payment method (e.g., **cash**).

5. Processing Refunds

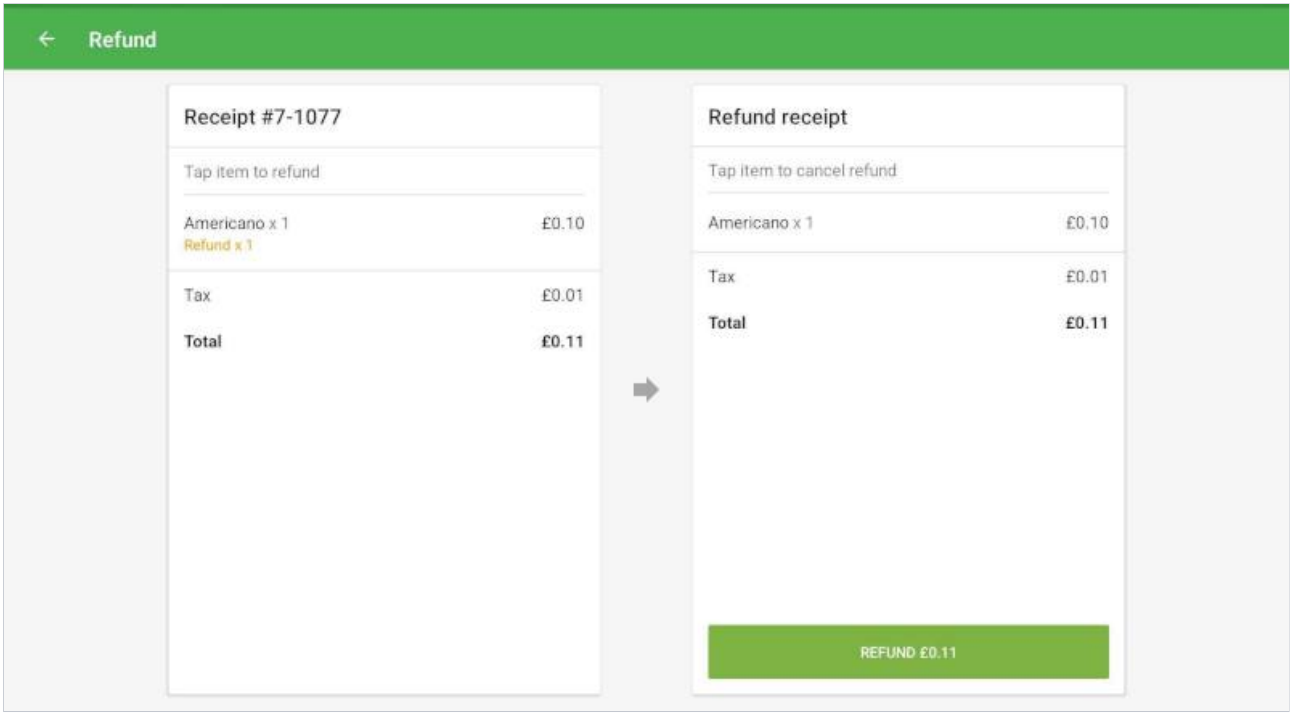
In the Loyverse POS app, go to the '**Receipts**' menu.

Tap the receipt you want to refund.

Tap '**Refund**'.



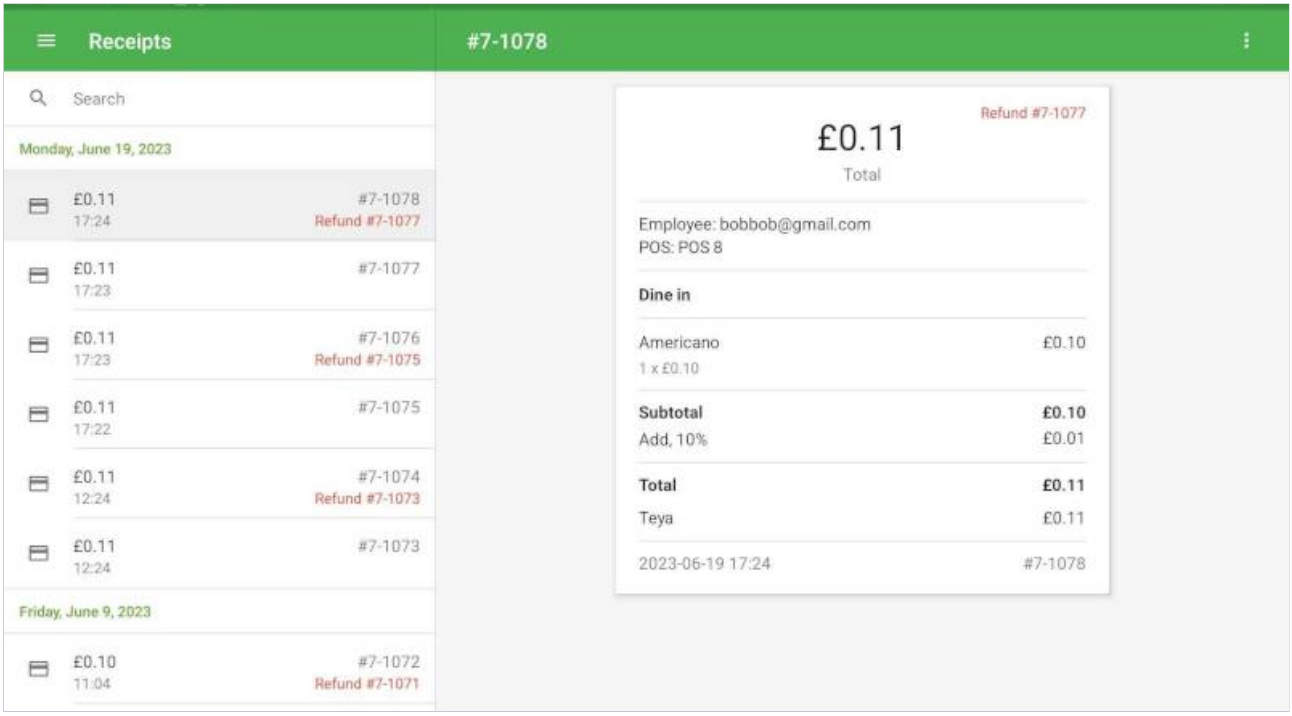
Select the items to refund (they will move to the right side of the screen).



Tap the '**Refund**' button.



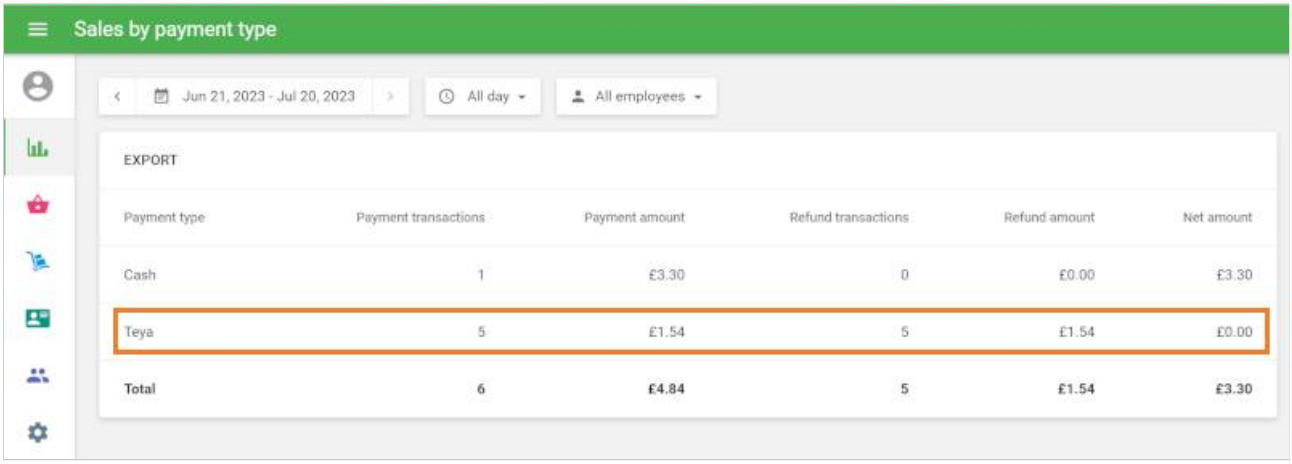
The refund will be processed through Teya, and the receipt will be marked as **refunded**.



6. Viewing Reports

To track card payments and refunds made via Teya:

- Go to the **Back Office > Reports > Sales by payment type**.
- You'll see the total number and amount of transactions handled through Teya.



See also:

[How to Accept Credit Card Payments in Loyverse POS]

How to Accept Credit Cards with Loyverse POS and PayPal Zettle

Video
https://www.youtube.com/watch?v=vmZT3y-F4H0

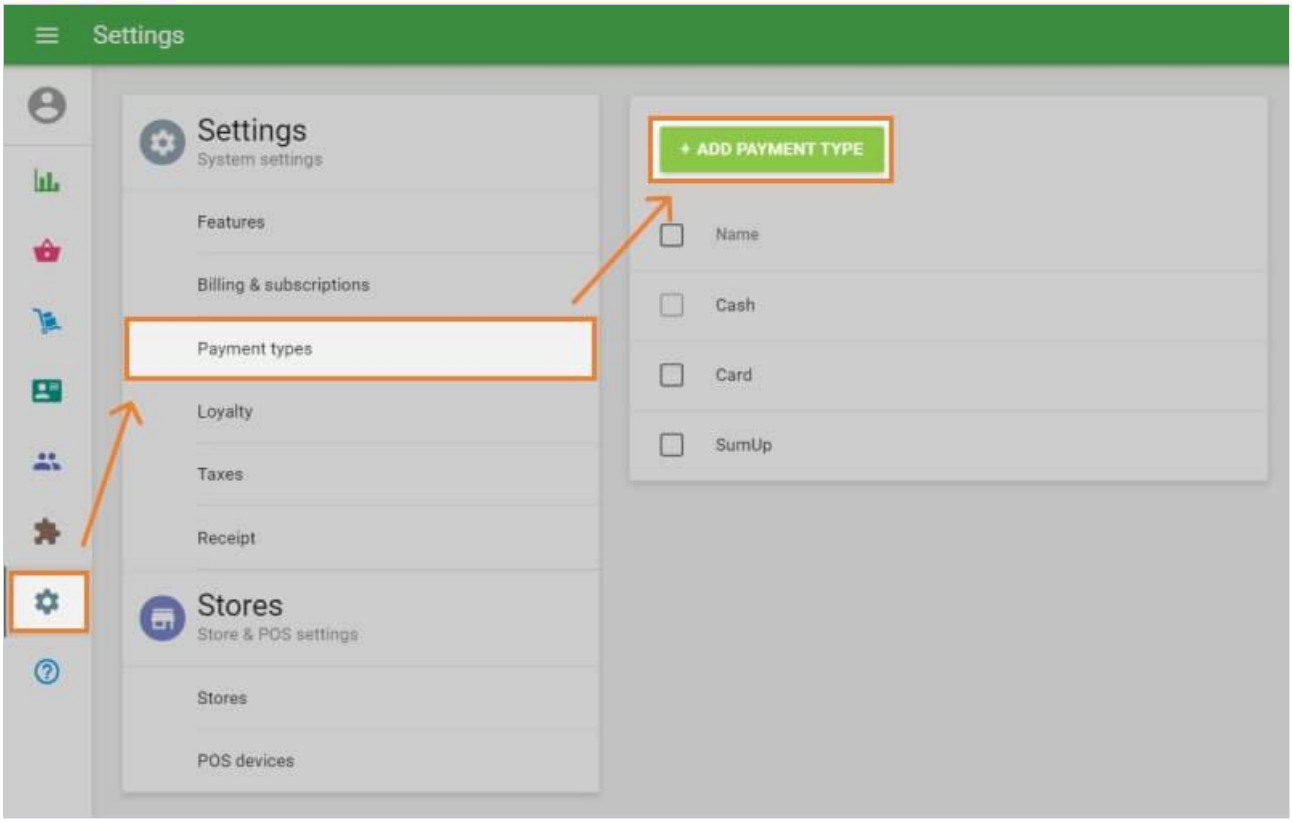
Loyverse POS merchants can accept credit card payments via PayPal Zettle and it is available to customers in the USA, Brazil, Denmark, Finland, Great Britain, Italy, Mexico, Norway, Spain, Sweden, and the Netherlands.

Before connecting a card reader, you need to create an account in PayPal Zettle and receive the device. Integration with Loyverse POS works on the card reader Zettle Reader 2.

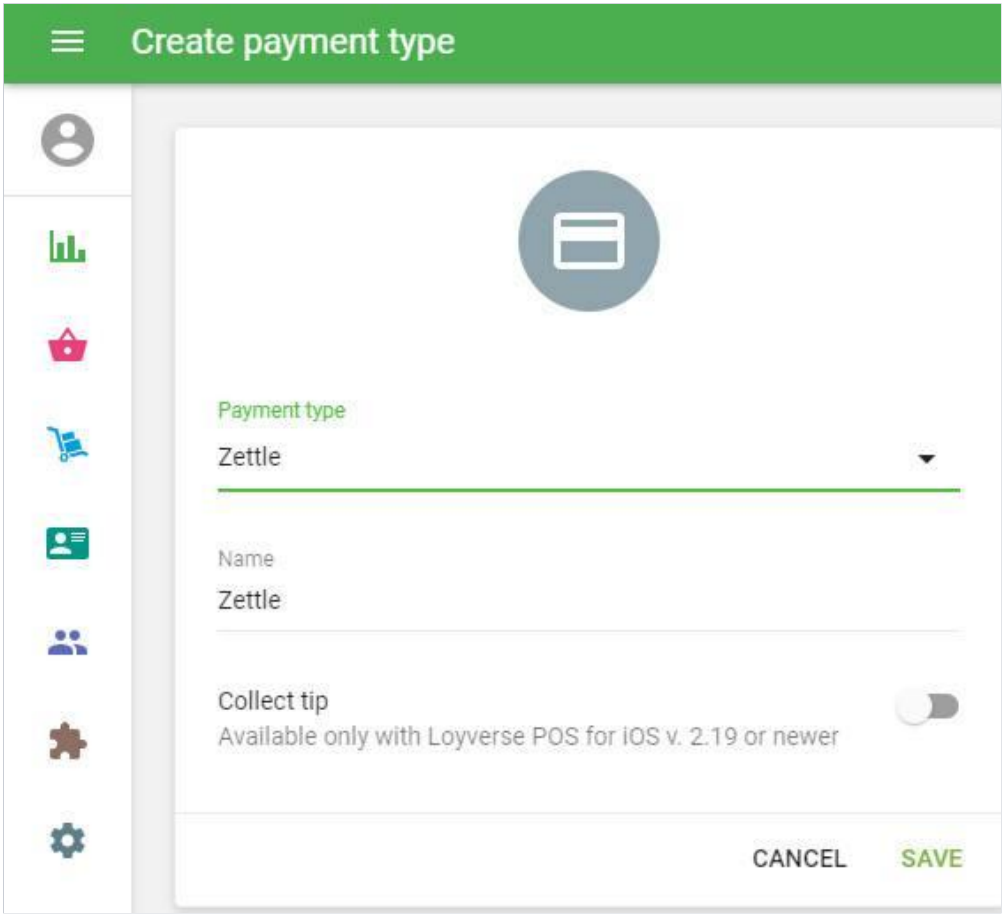
Note: PayPal Zettle works only with mobile devices with turned-on geolocation.

1. Connecting the Card Reader

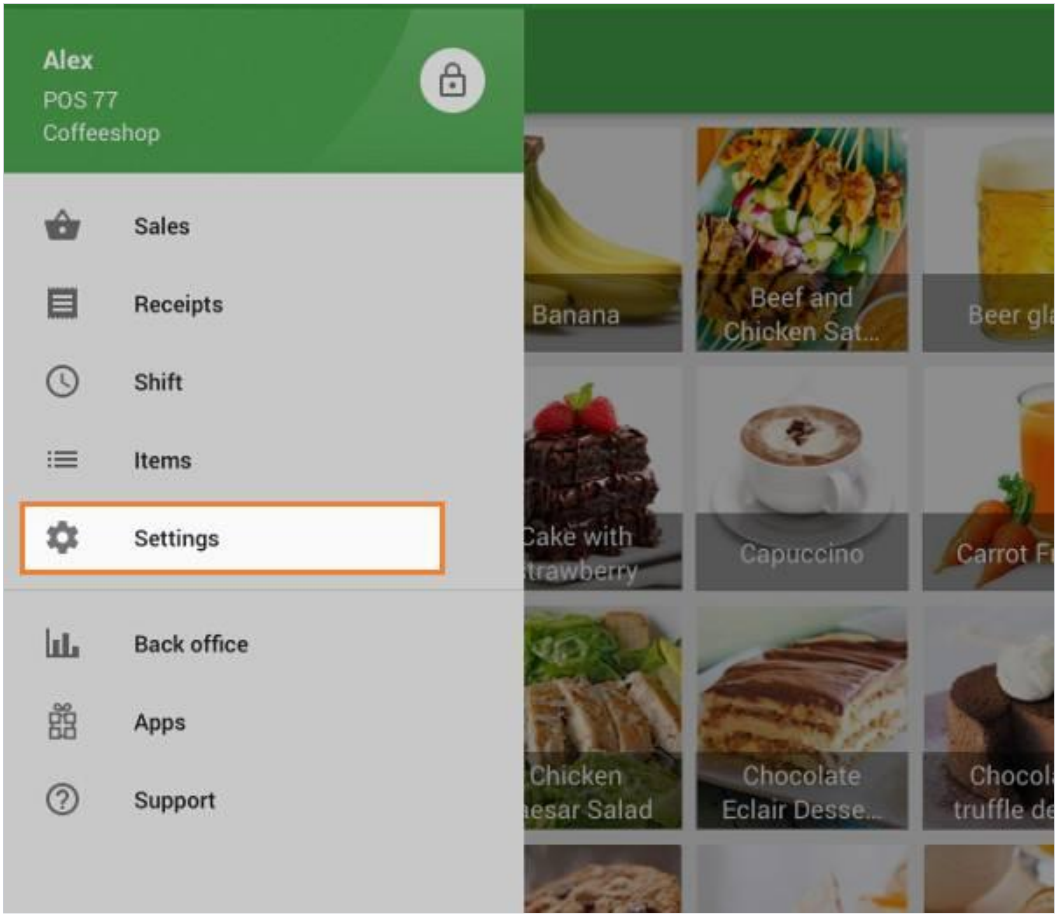
Log in to the Back Office, click the 'Settings' menu and then 'Payment types.' Click the 'Add payment type' button to add a new type of payment.



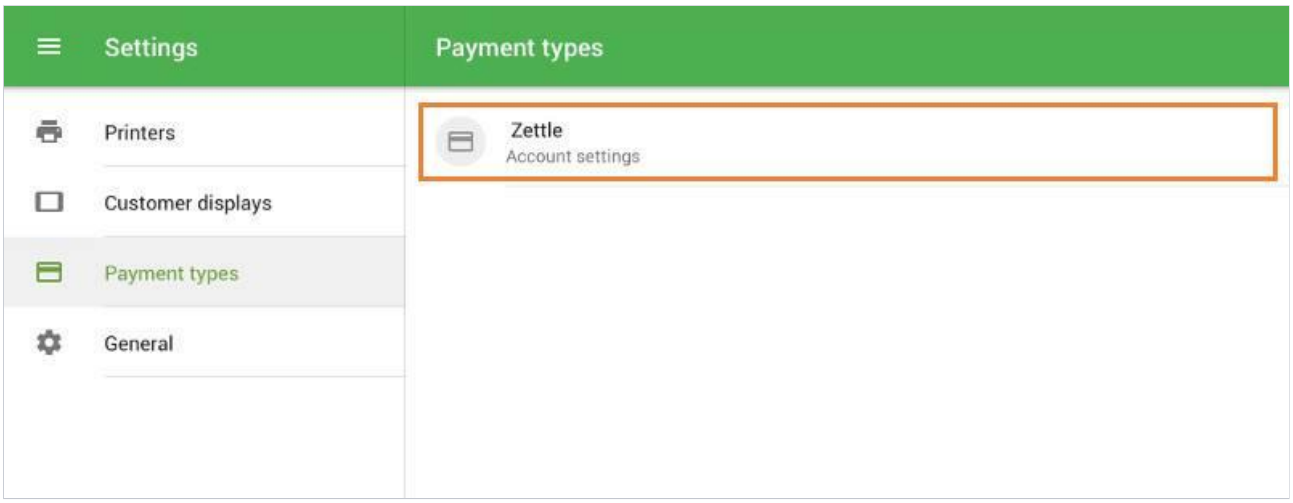
In the 'Add Payment Type' window, select the 'Zettle' payment type from the drop-down list. Save your changes when done.



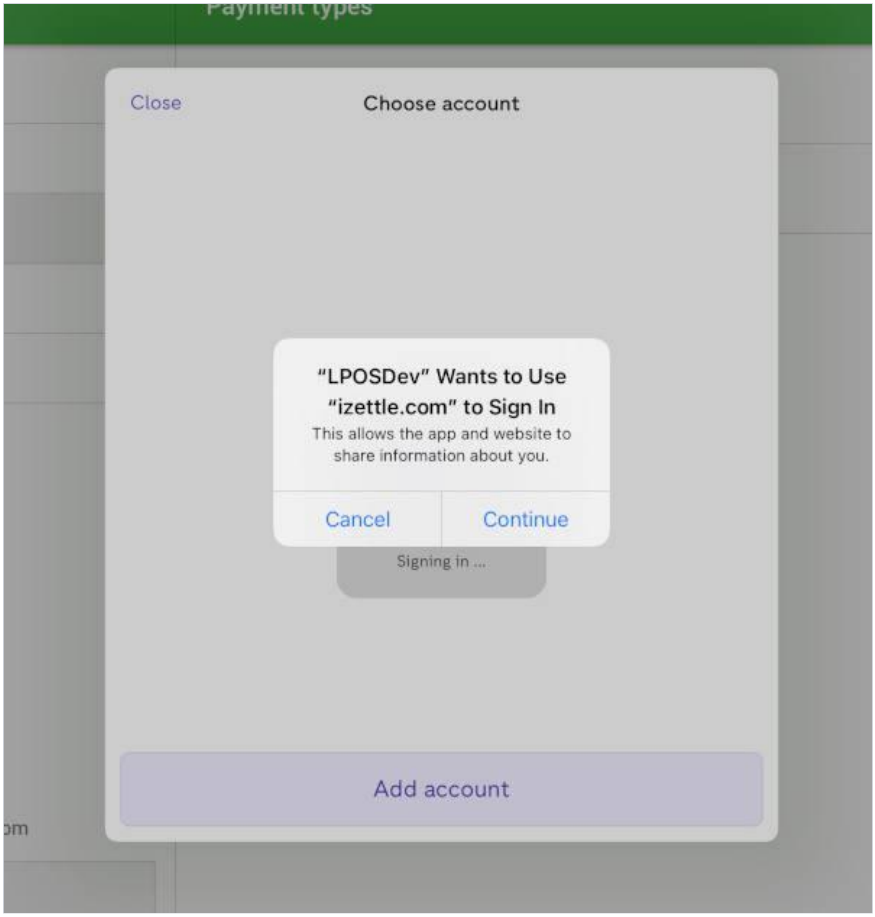
Then launch the Loyverse POS and go to Settings > Payment Types.



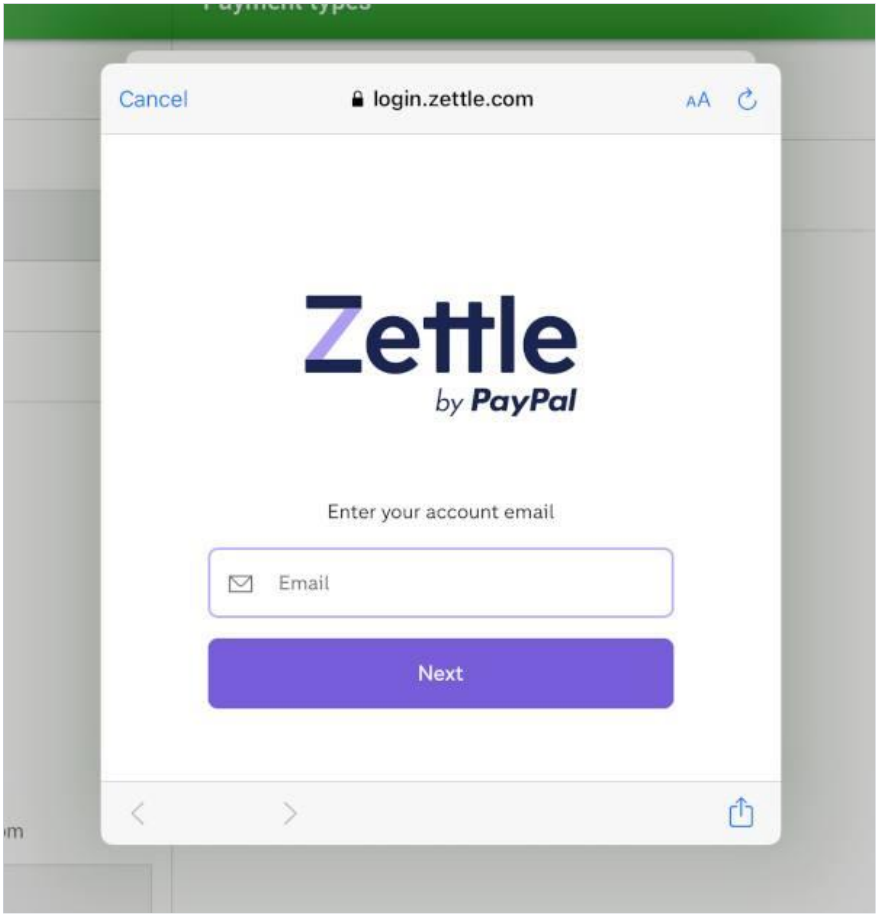
Tap the ‘Zettle’ button for account settings.



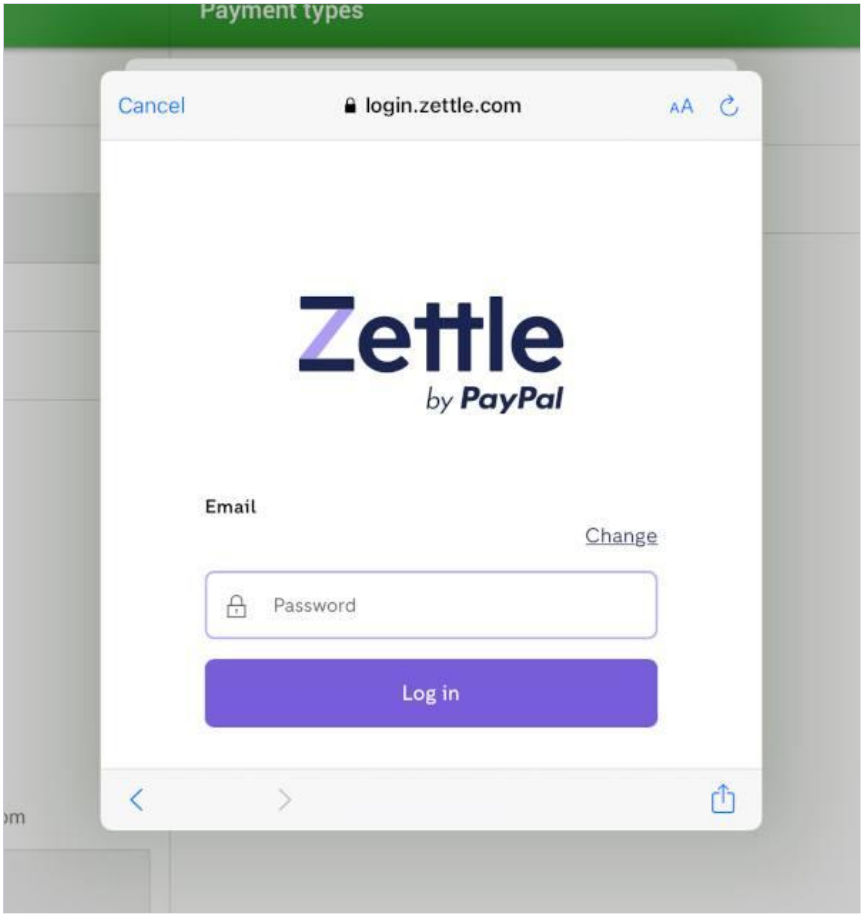
In the ‘Choose account’ window, confirm the access right to sign in to the Zettle account from Loyverse POS by tapping on the ‘Continue’ button.



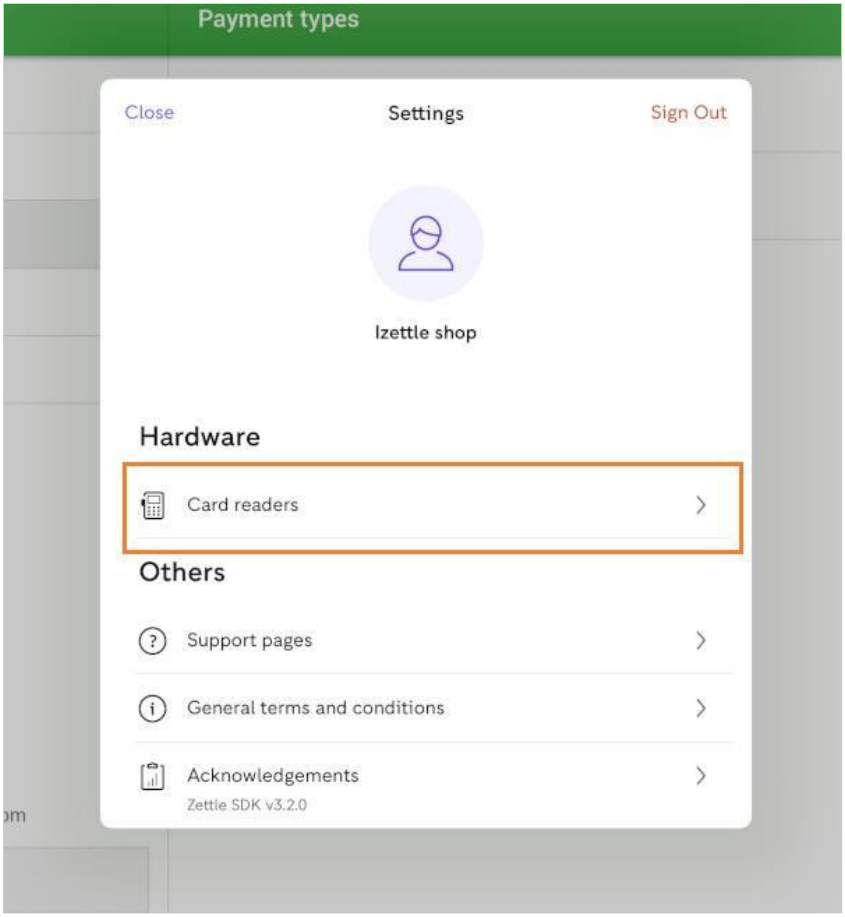
Enter the Email of your Zettle account and tap the ‘Next’ button.



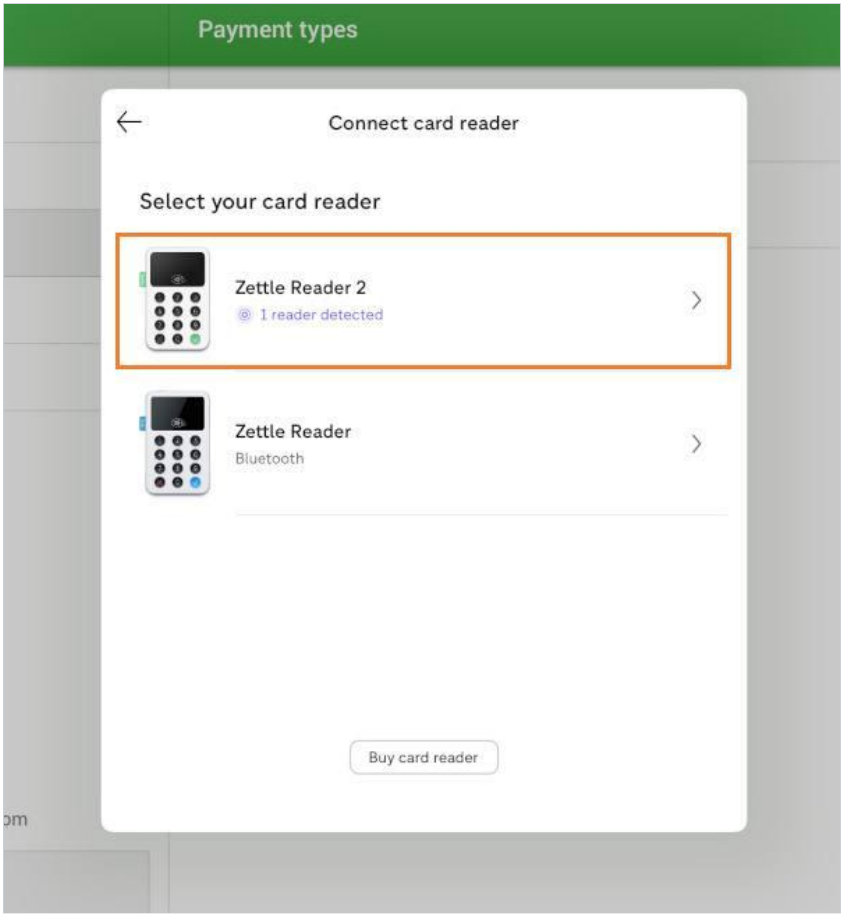
Enter the password of your Zettle account and tap the ‘Login’ button.



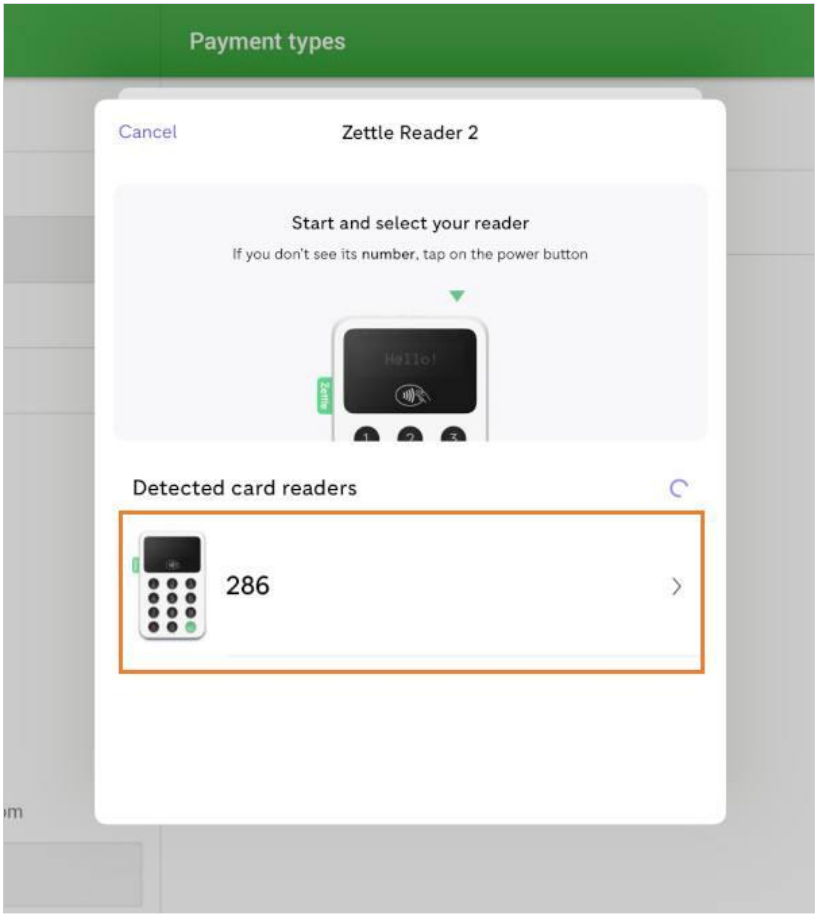
You will log in to your Zettle account. Tap the ‘Card readers’ button.



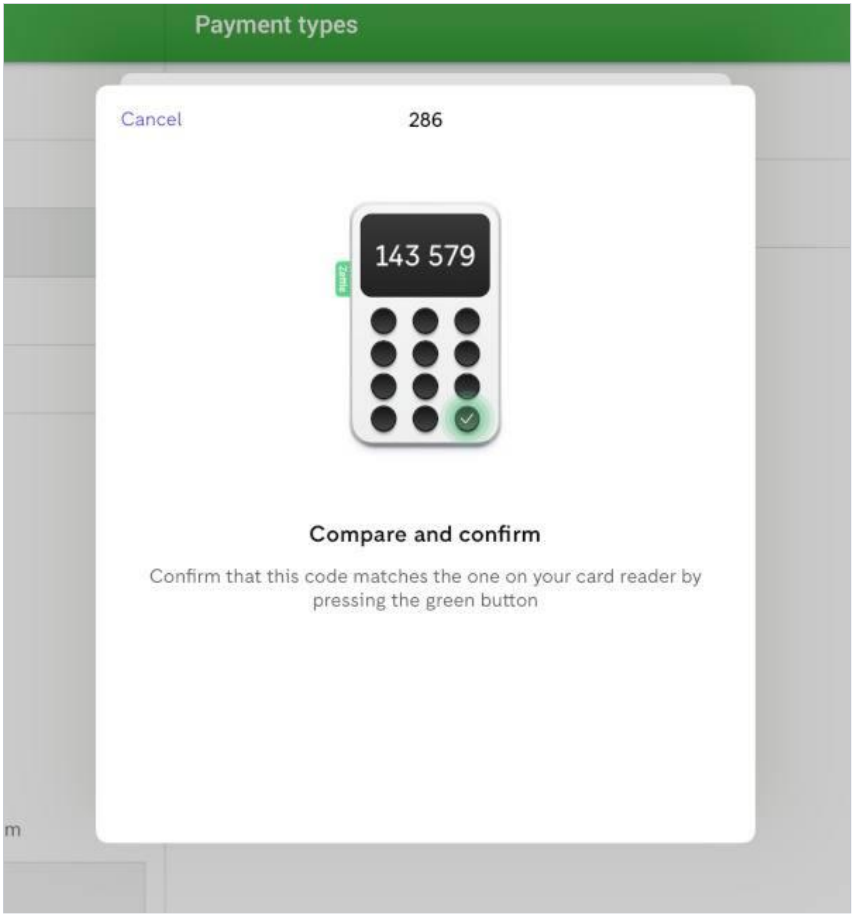
Select your type of card reader.



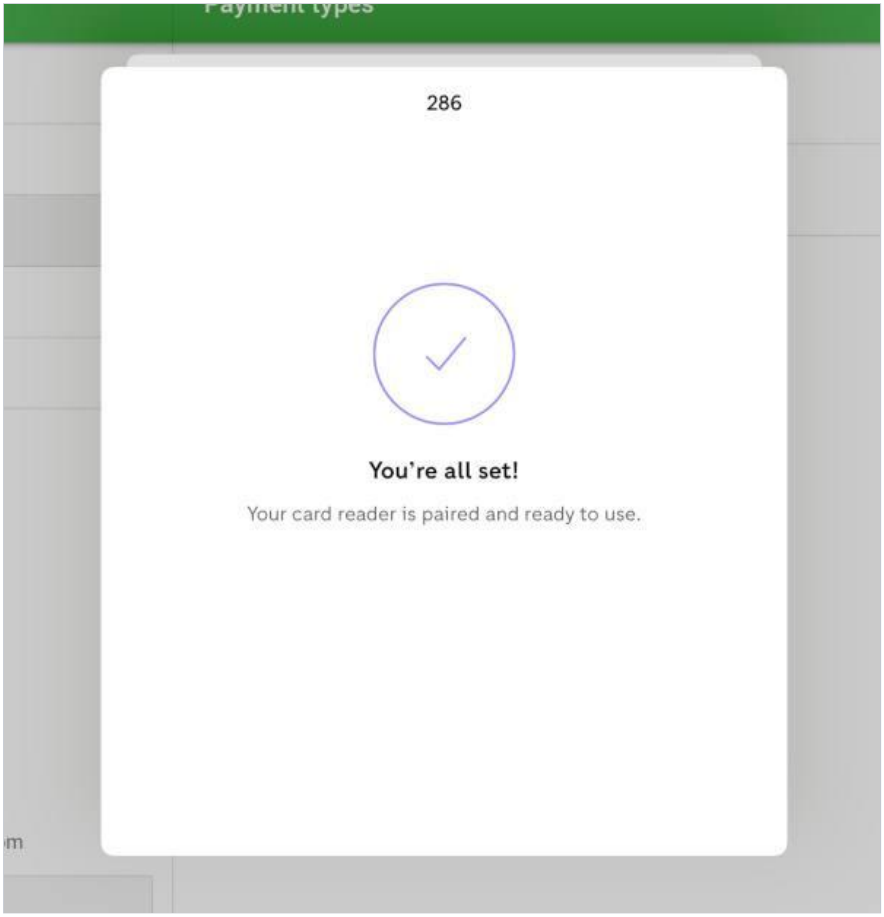
Follow the instructions on the screen: start your card reader. The system will detect your card reader. Tap on it to select.



Confirm the connection to the card reader by comparing the code and pressing the green button on the card reader.



Now your card reader is connected.



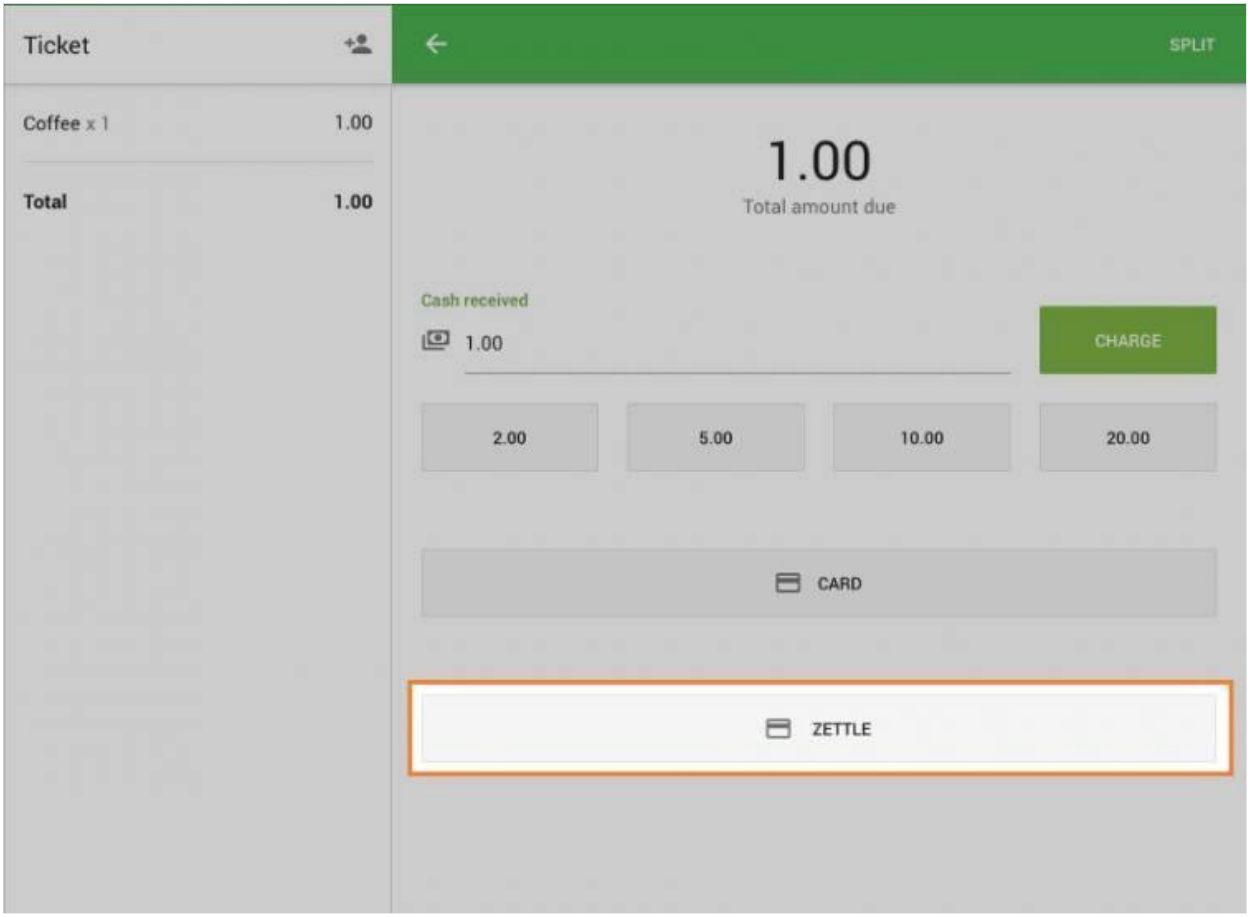
You are ready to accept card payments.

2. Processing Payments

Payment

Add items to the ticket and press 'Charge'.

Tap the 'Zettle' button selecting payment type.

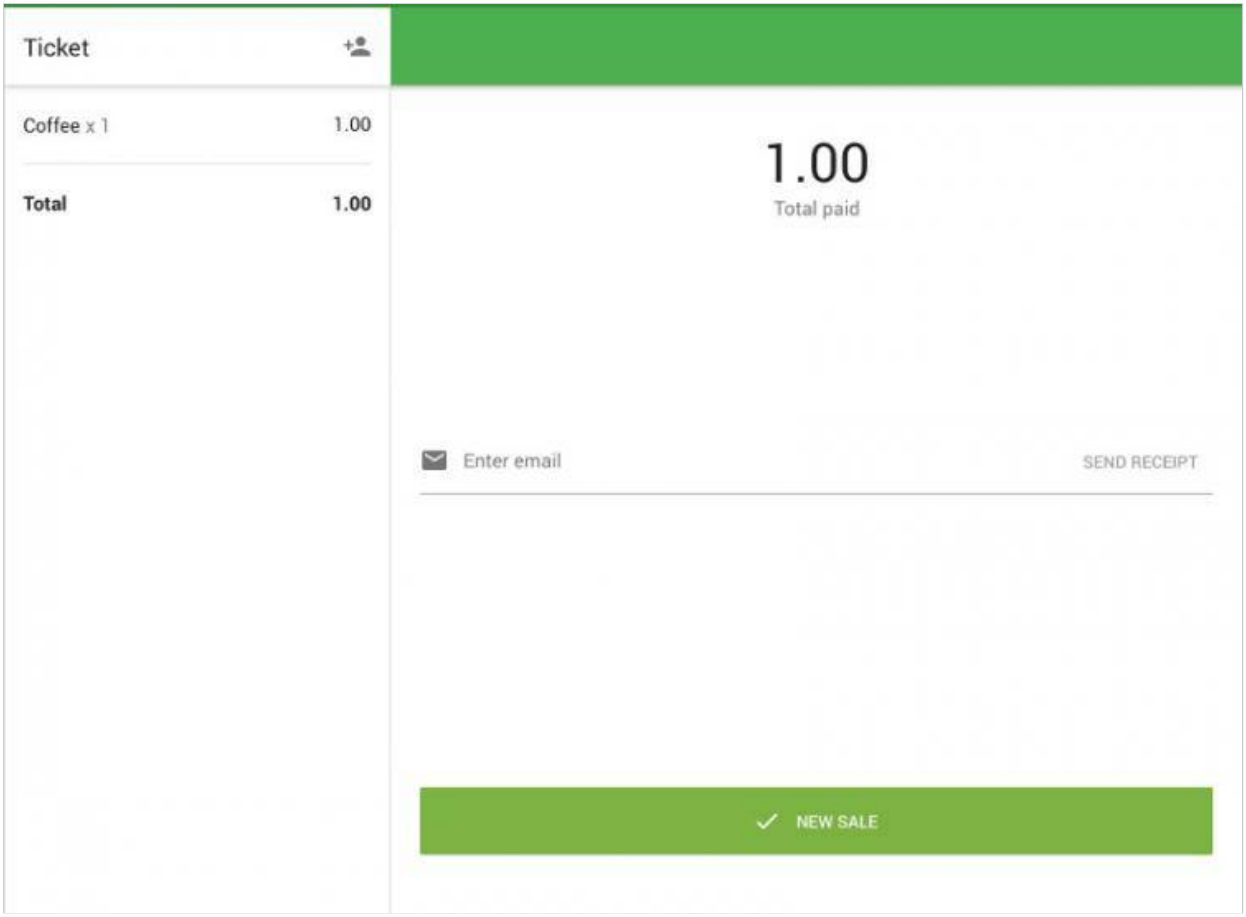


Loyverse POS will wait for a response from the card reader, and you will see an invitation to tap/ insert card on the card reader.

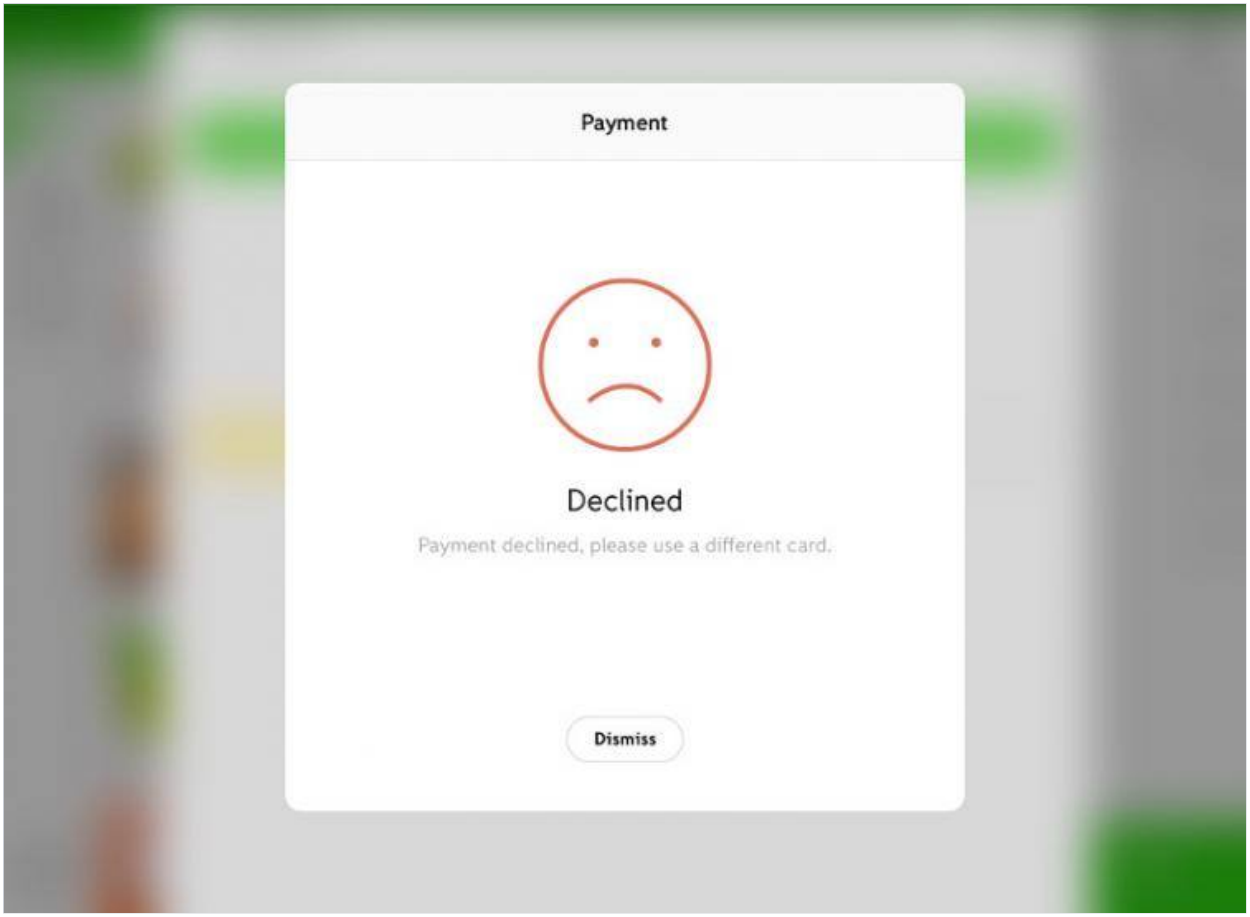
Insert your cards with a chip into the bottom slot of the card reader and give it to the customer to enter the PIN.



If the transaction is successful, Loyverse POS will display the ‘Transaction is successful’ screen.



In case of an error in the transaction, Loyverse POS will show an error message.

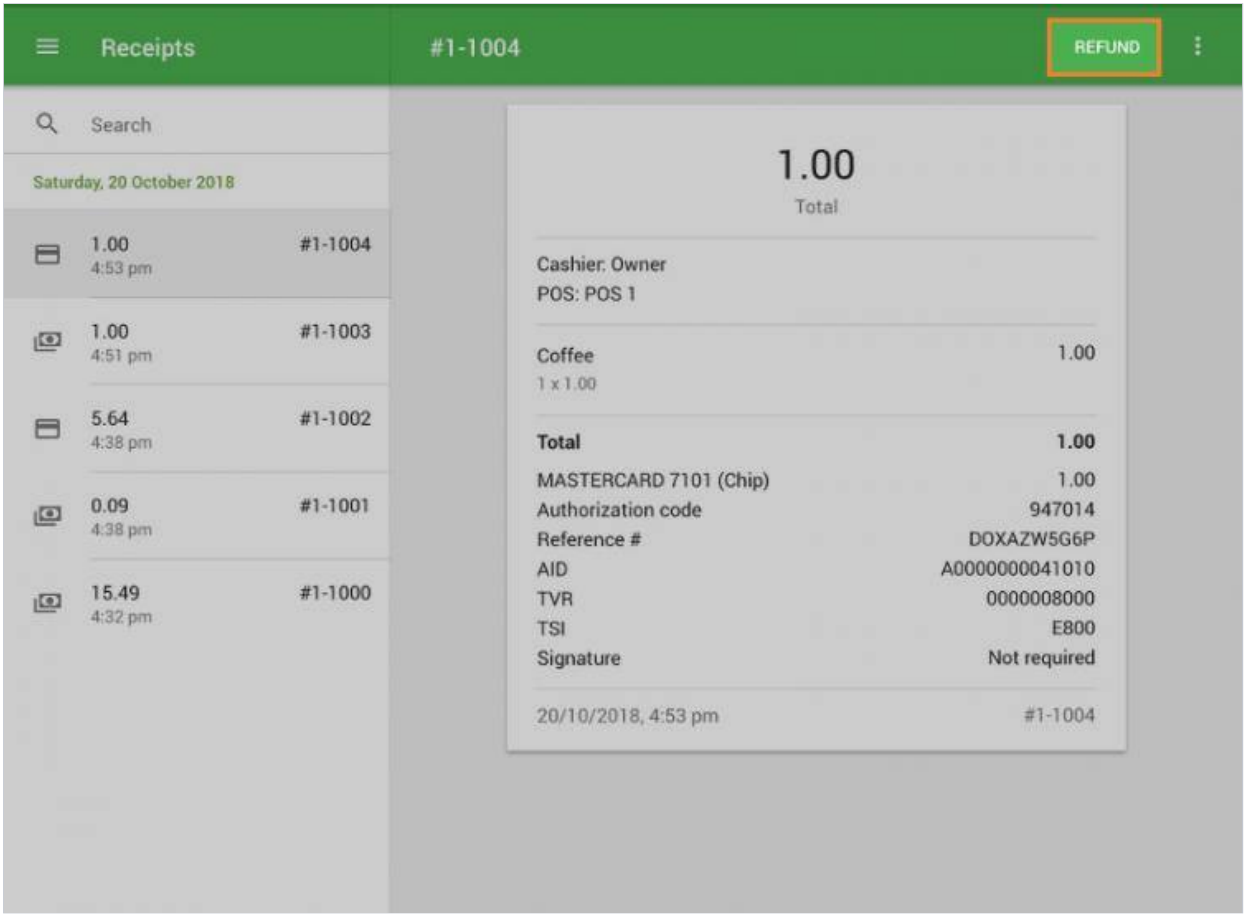


Tap the ‘Dismiss’ button, and you will return to the ‘select payment type’ screen. You can ask the customer to choose a different type of payment (for example ‘Cash’) or try another card.

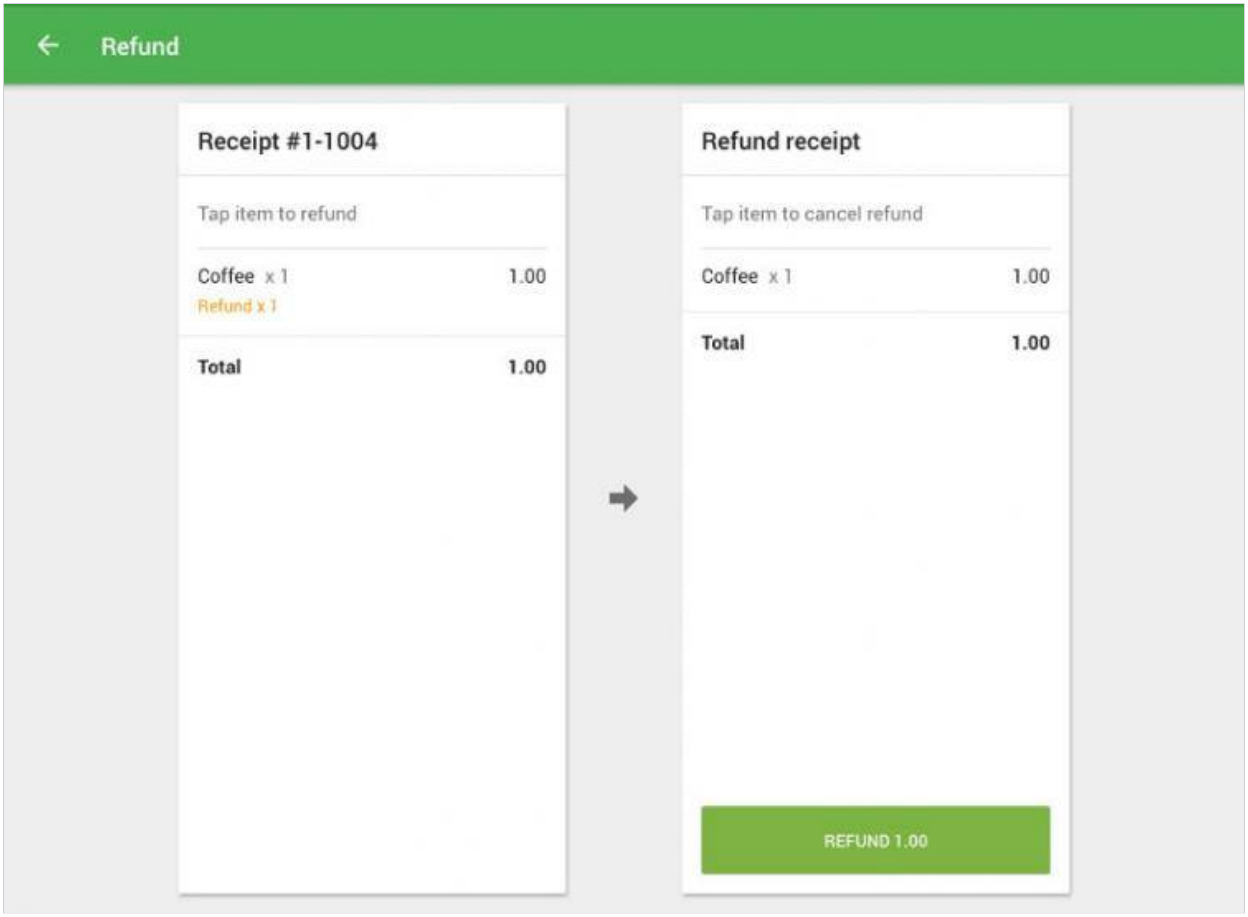
Refund

You can refund the ticket fully or partially. The card reader is not used in the refund process.

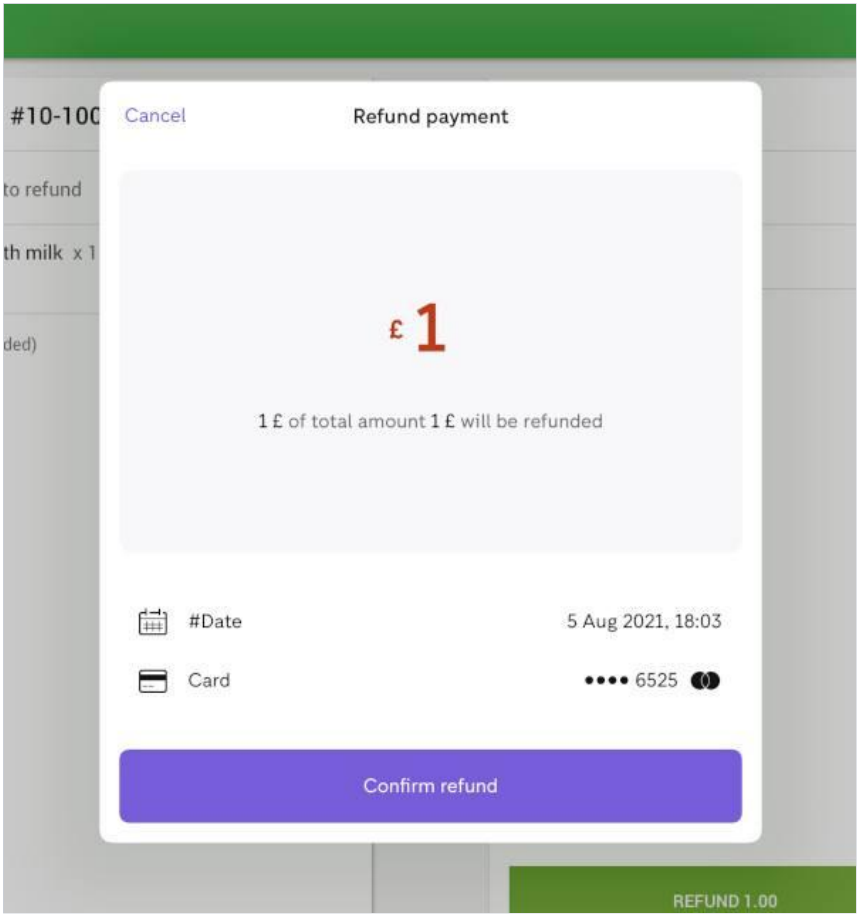
In the Loyverse POS, go to the ‘Receipts’ menu, and tap on the desired receipt.
Then tap ‘Refund’.



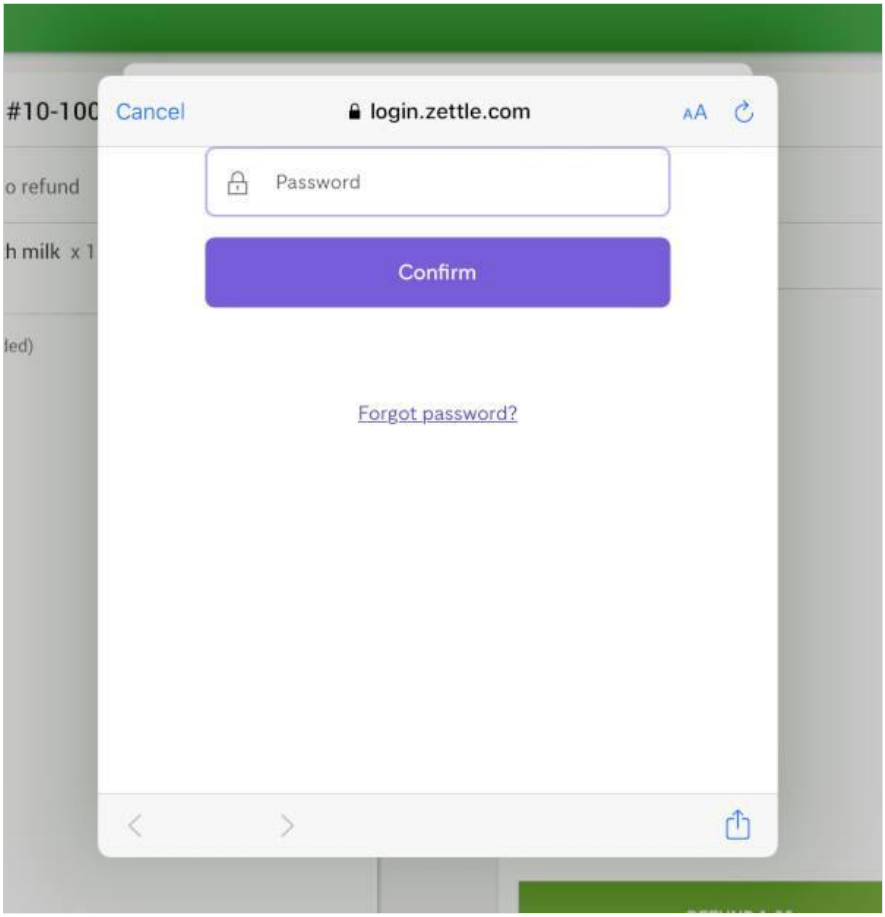
Select all items on the receipt that were paid via card (on the left side) to move them to the ‘Refund receipt’ list (on the right side), and tap the ‘Refund’ button.



At the ‘Refund payment’ screen, check the refund details and type the ‘Confirm refund’ button.

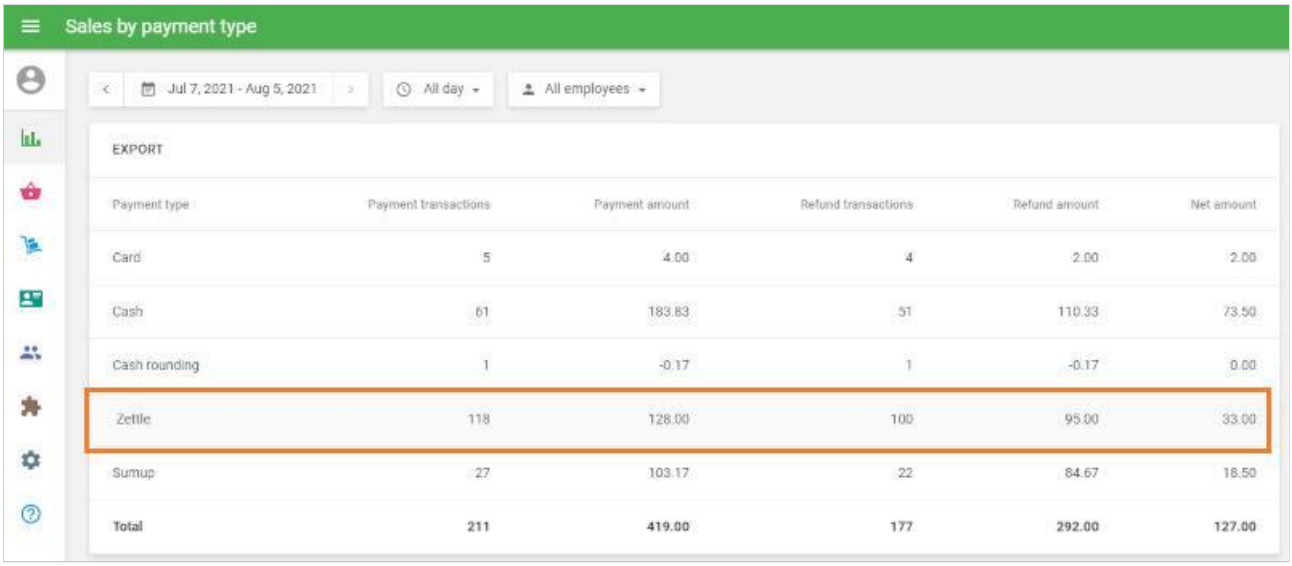


Enter the password from the Zettle account in the ‘Password’ field and tap ‘Confirm’.



Reports

You can view the total number of transactions performed with Zettle. In the Back Office, select the ‘Sales by payment type’ report.



Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	5	4.00	4	2.00	2.00
Cash	61	183.83	51	110.33	73.50
Cash rounding	1	-0.17	1	-0.17	0.00
Zettle	118	128.00	100	95.00	33.00
Sumup	27	103.17	22	84.67	18.50
Total	**211**	**419.00**	**177**	**292.00**	**127.00**

See also:

[Configuring Payment Types in Loyverse POS]

How to Accept Credit Cards with Loyverse POS and Tyro

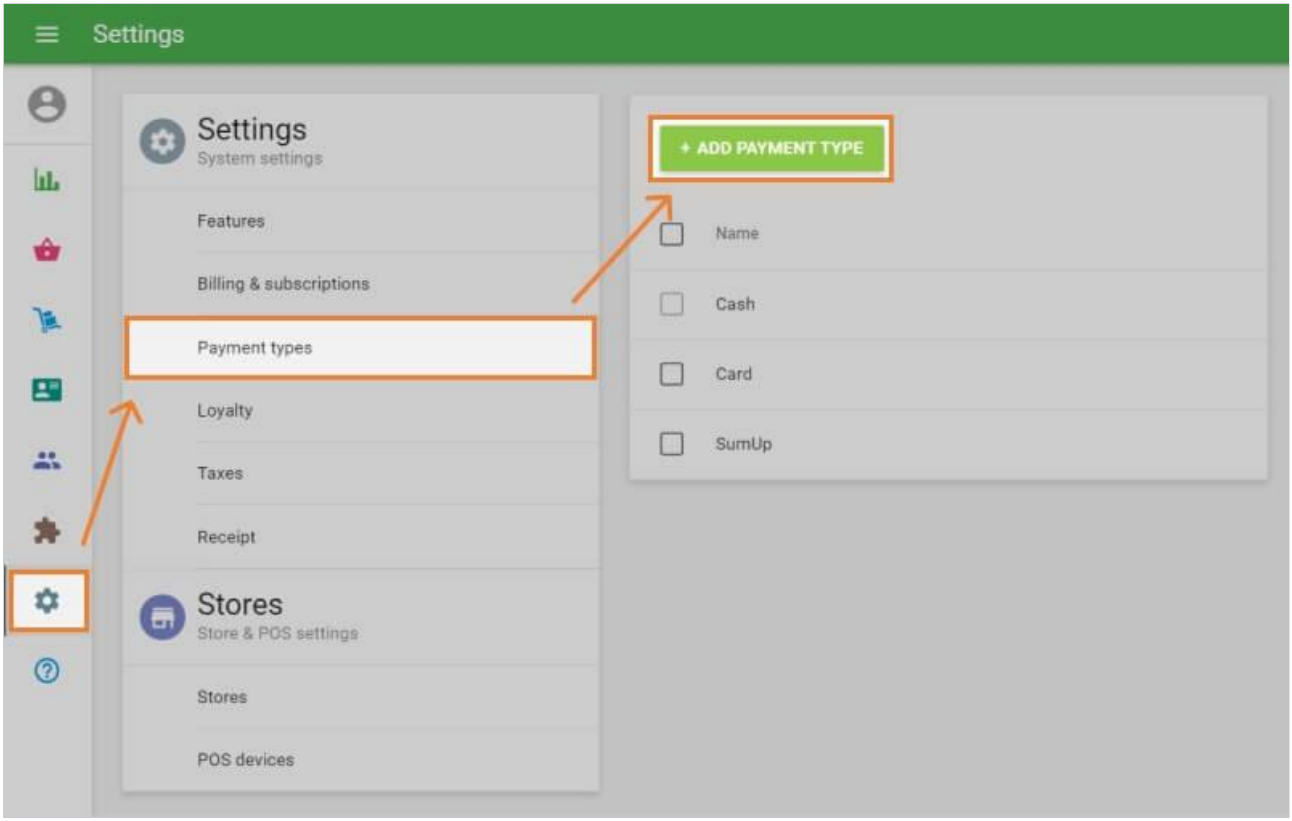
This feature works only on iOS devices.

Loyverse POS merchants can accept credit card payments via a provider of electronic funds transfer at point of sale (EFTPOS) - Tyro. Tyro is only available to merchants and customers in **Australia**.

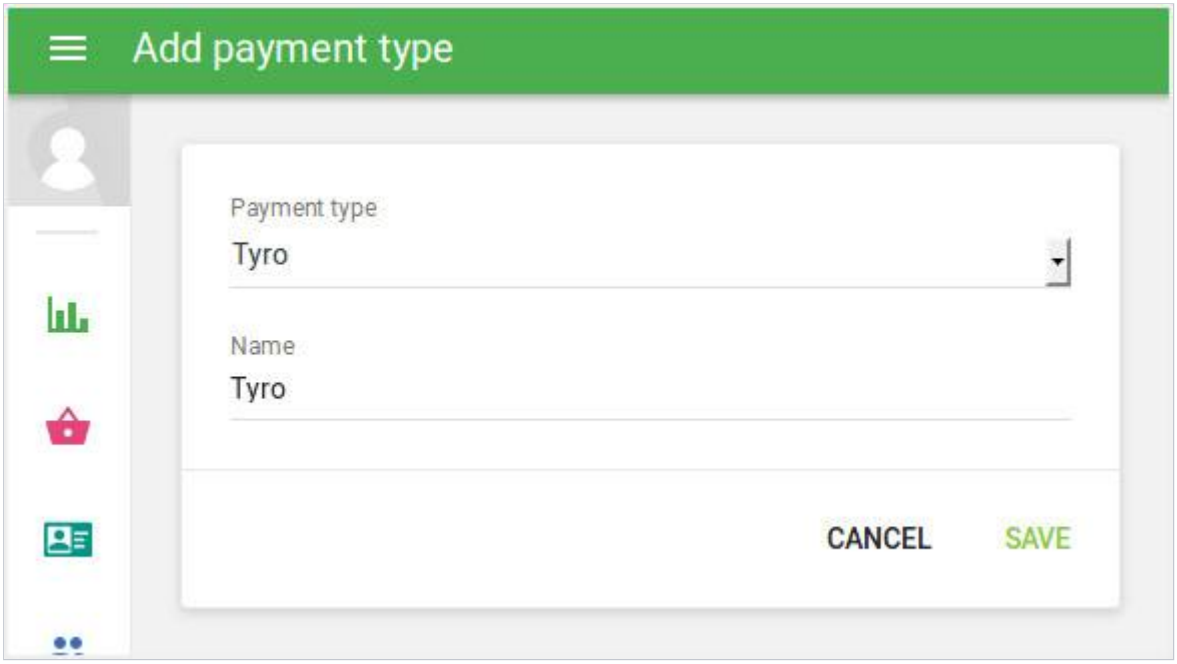
Before connecting a terminal, you have to create an account in Tyro and receive the device. Integration with Loyverse POS on iOS devices works on terminals: Yoximo GSM 3G and Tyro Pro.

1. Connecting Tyro Terminal

Log in to the Back Office, click on the 'Settings' menu and then 'Payment types'. Click on the '+ Add payment type' button to add a new type of payment.

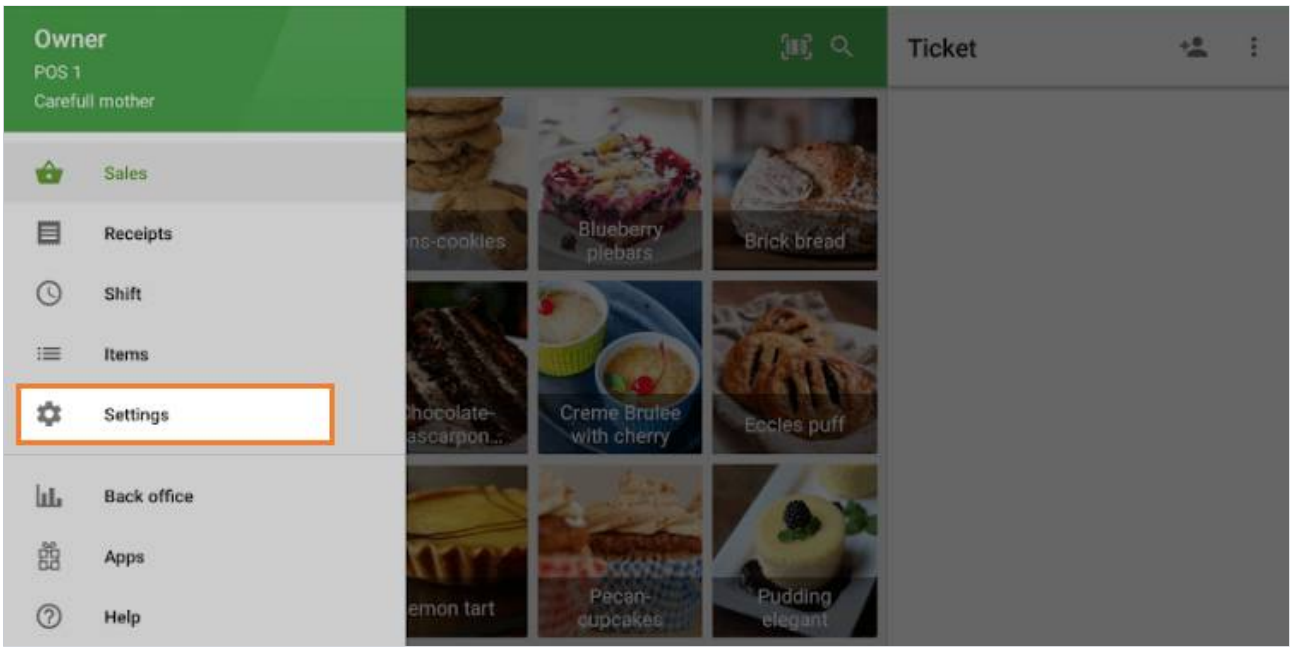


In the Add Payment Type window, select 'Tyro' in the payment type drop-down list. Save your changes when done.

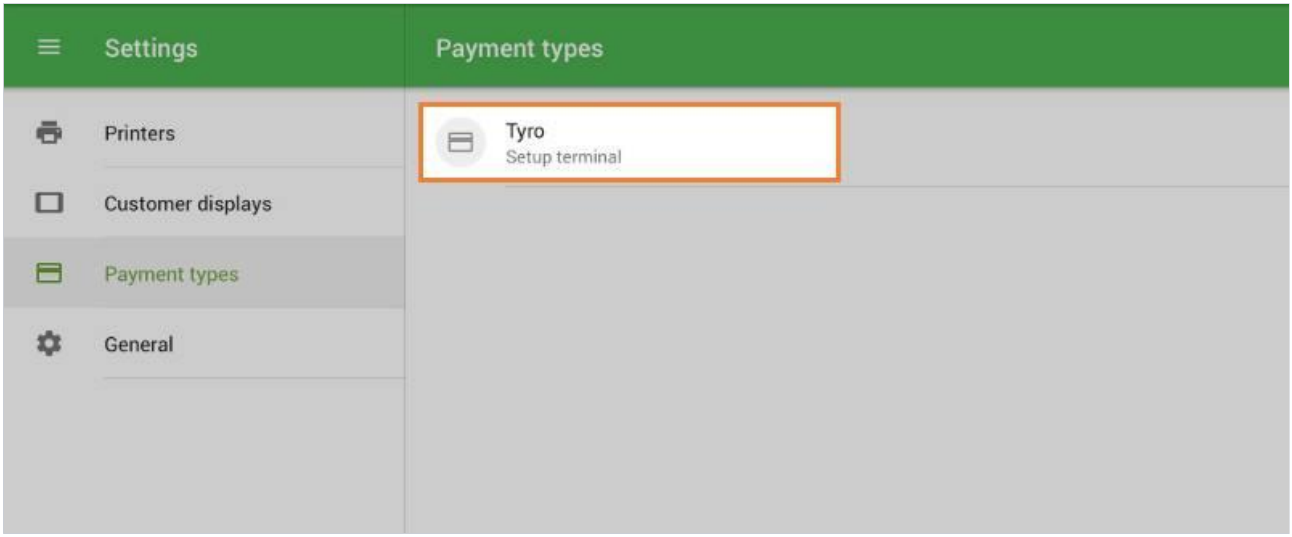


Turn on your Tyro terminal. It should also be connected to the Internet.

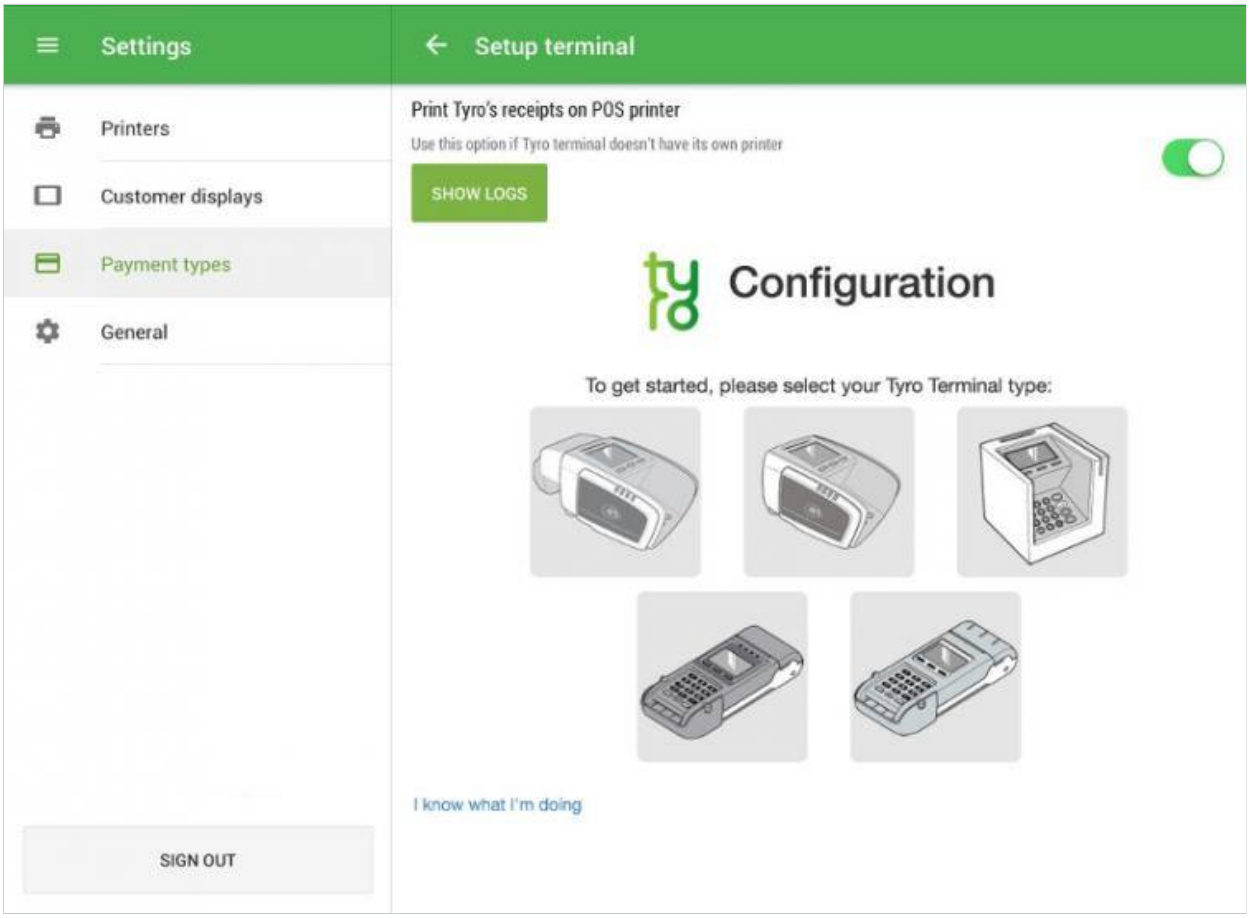
Then launch Loyverse POS and go to Settings > Payment Types.



Tap the ‘Tyro’ button for account settings.

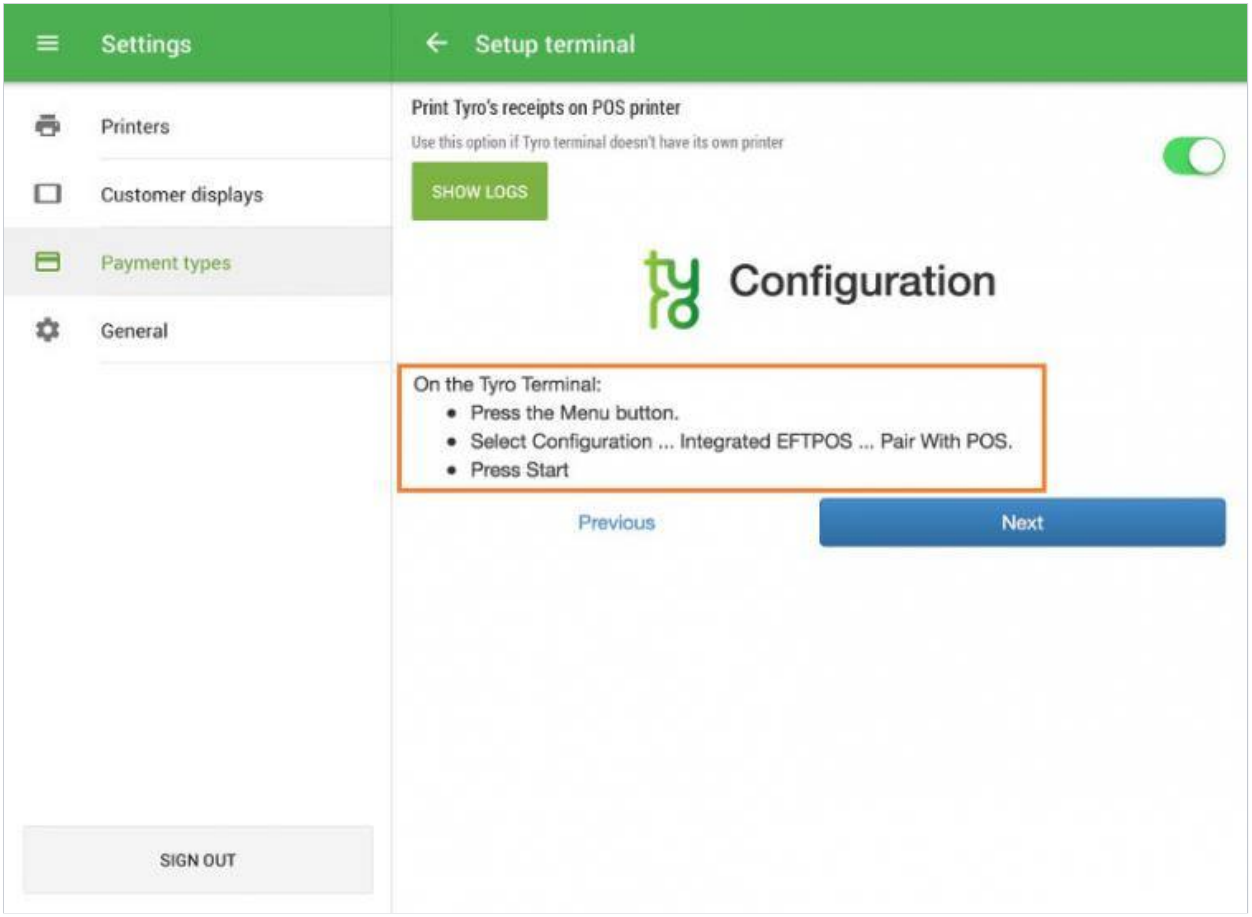


In the ‘Tyro Configuration’ window, select your Tyro Terminal type.

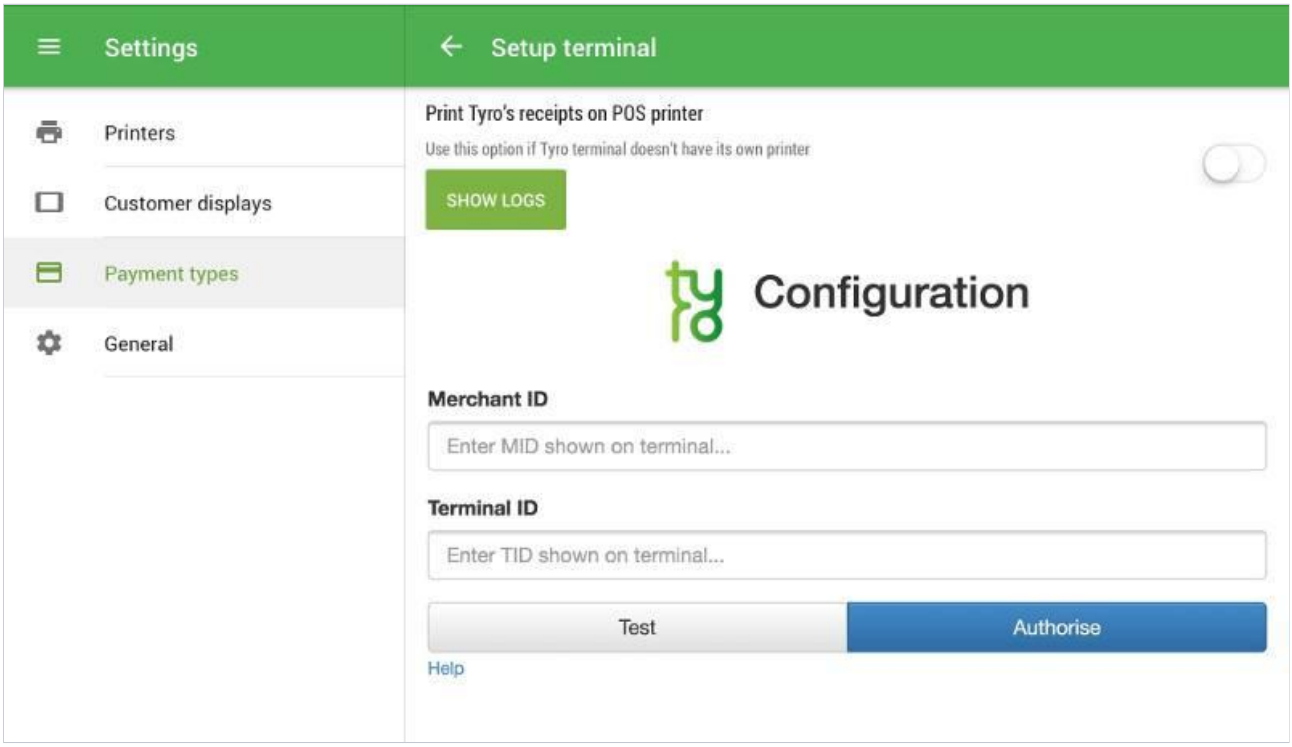


If your Tyro Terminal does not have a printer, you can choose the option ‘Print Tyro’s receipt on POS printer’ to print card transaction receipts.

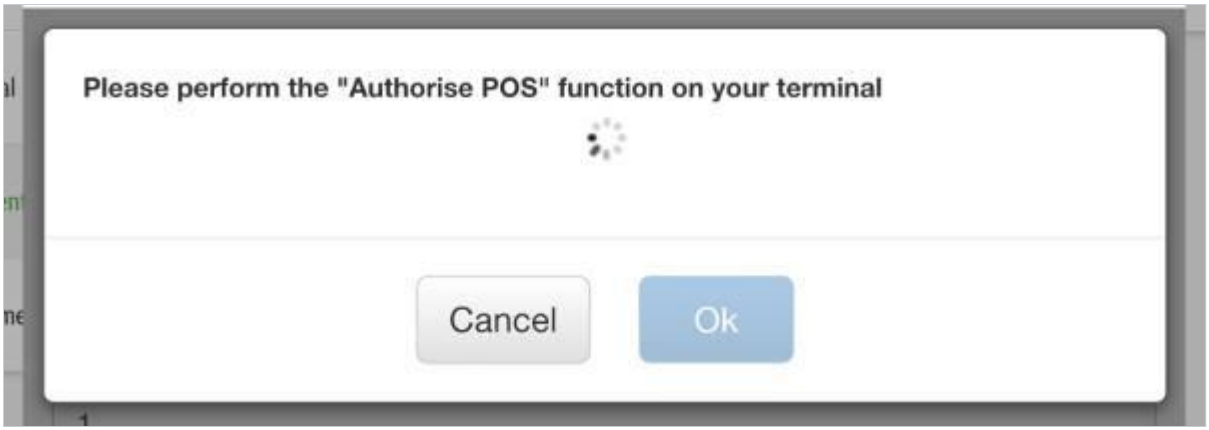
Follow the instruction on your Tyro Terminal and tap ‘Next’.



Enter ‘Merchant ID’ and ‘Terminal ID’ displayed on your Tyro Terminal screen. Then tap ‘Authorise’.



Follow the instructions on the dialog screen, perform the ‘Authorise POS’ function on your terminal, and then press ‘OK’.



You will see a message indicating the successful connection of your terminal. Tap ‘OK’.



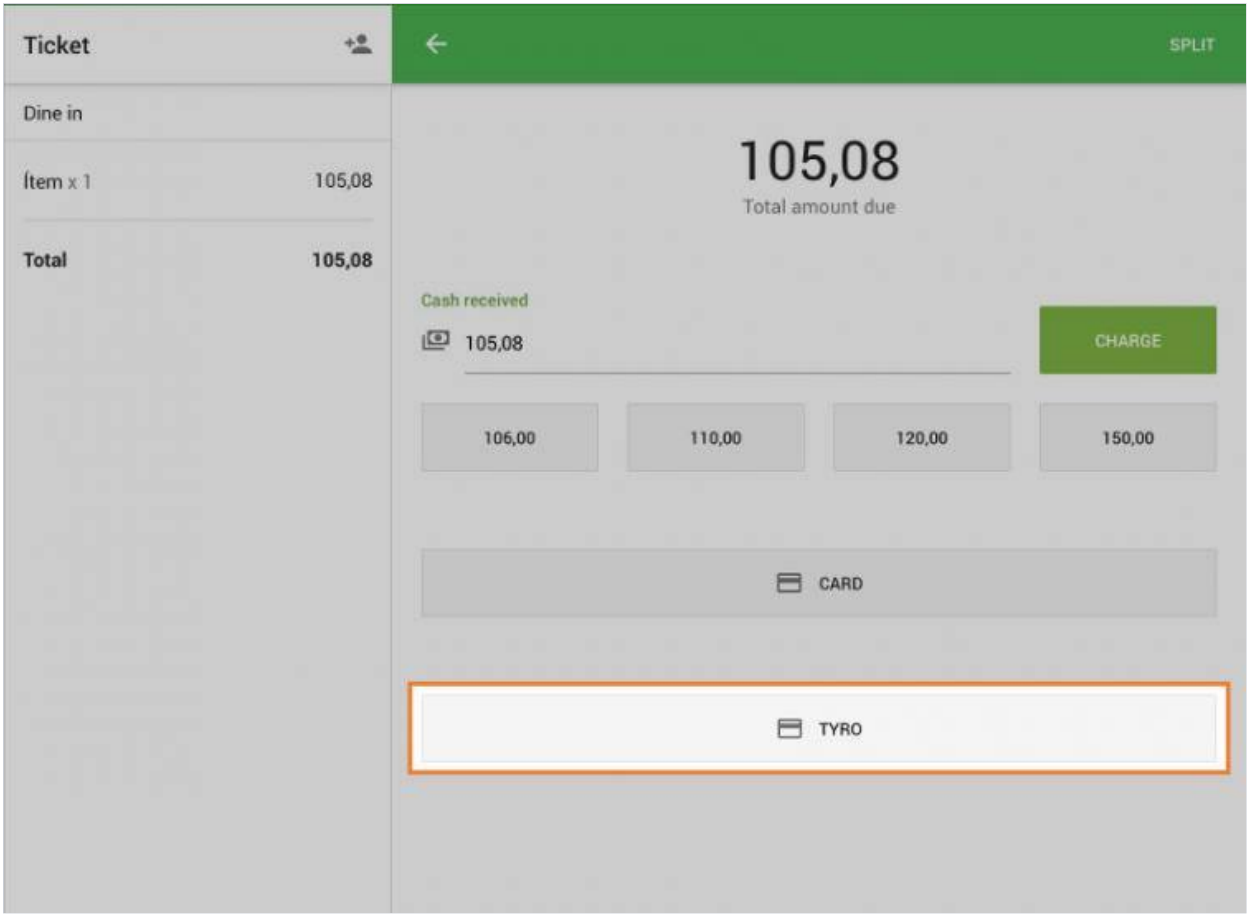
Now you are ready to accept card payments.

2. Processing Payments

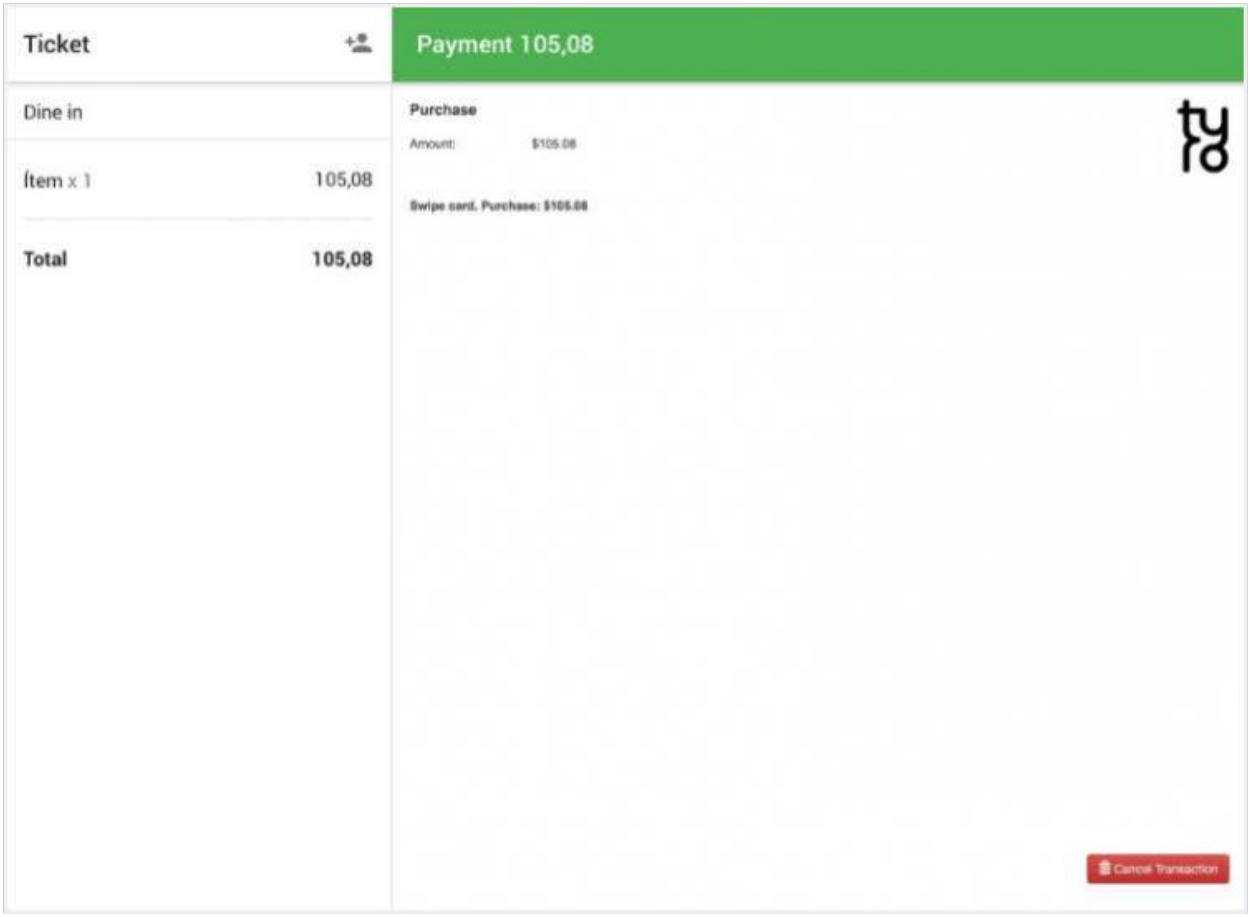
Payment

Add items to the ticket and press ‘Charge’.

Tap the Tyro payment type.



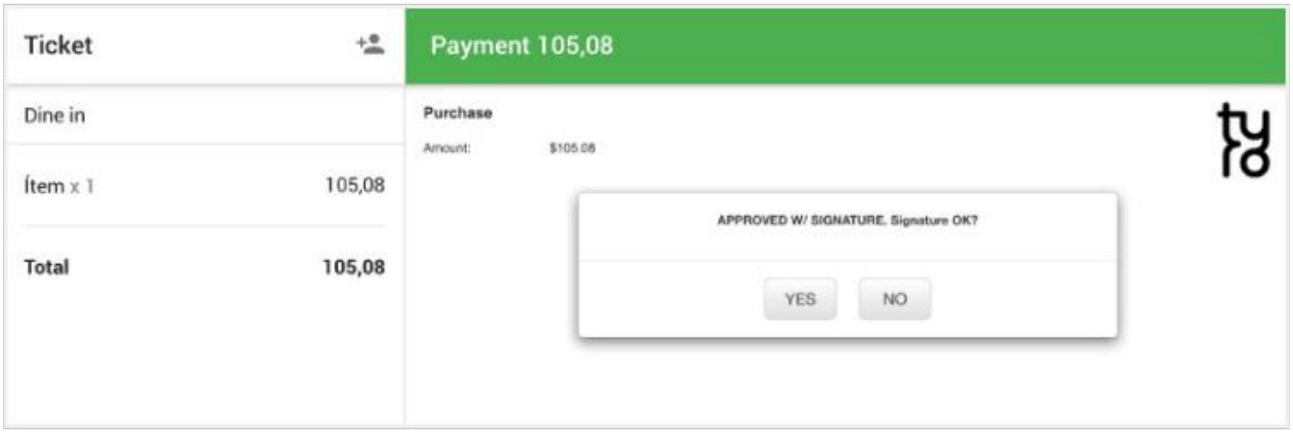
Loyverse POS will transfer the data to the terminal, and you will see an invitation to swipe the card.



After you swipe the card, if the transaction is successful, your printer will print the merchant copy of the payment receipt.



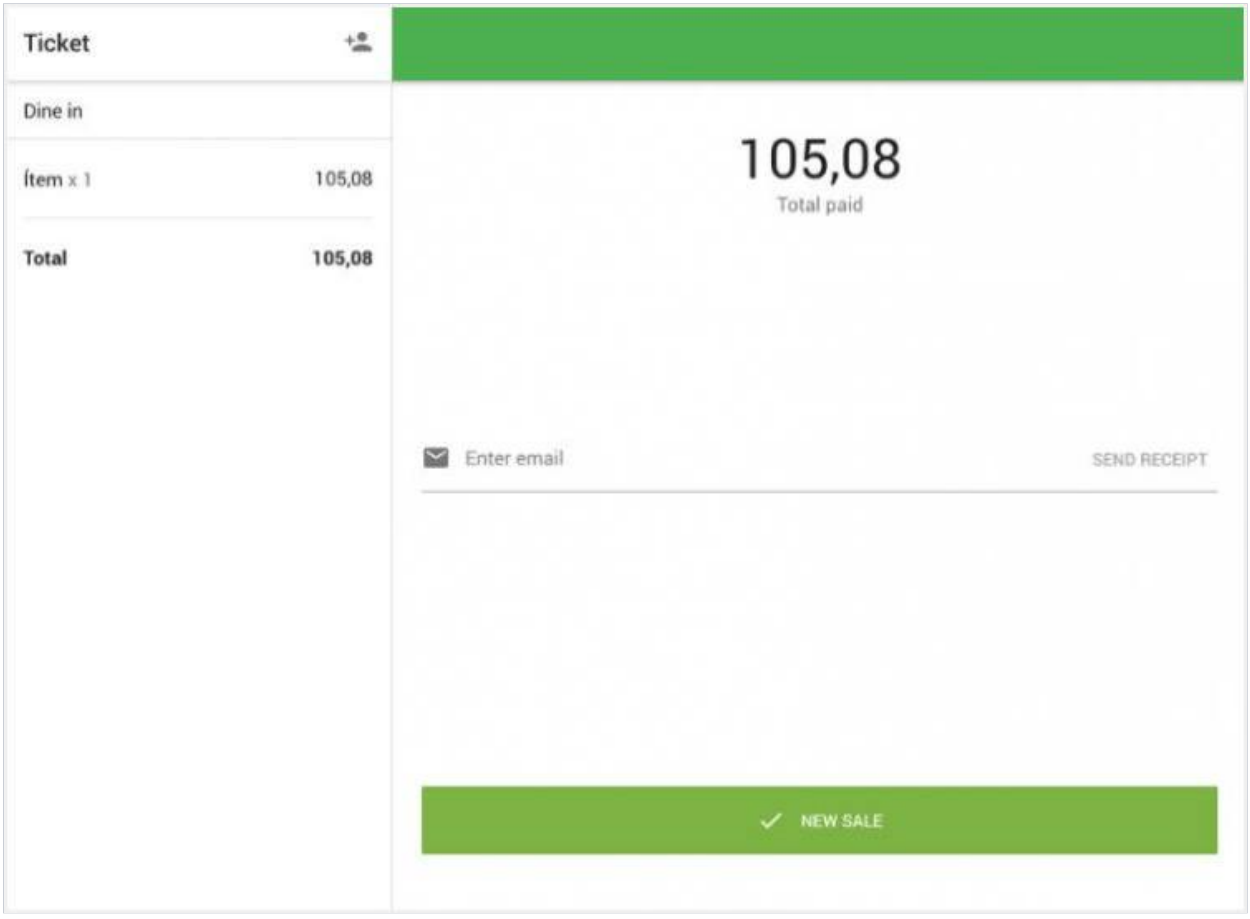
Hand it to the customer for their signature. If you approve the signature, tap the ‘Yes’ button on the Loyverse POS screen.



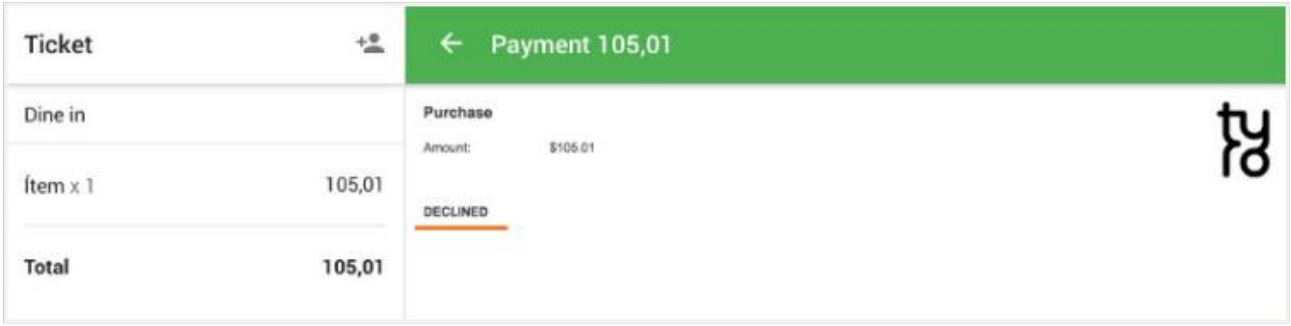
If the card requires a PIN, hand the card reader to the customer for them to enter their PIN.

Then the customer copy of the payment receipt will be printed.

Loyverse POS will display the screen with "Total paid" amount.



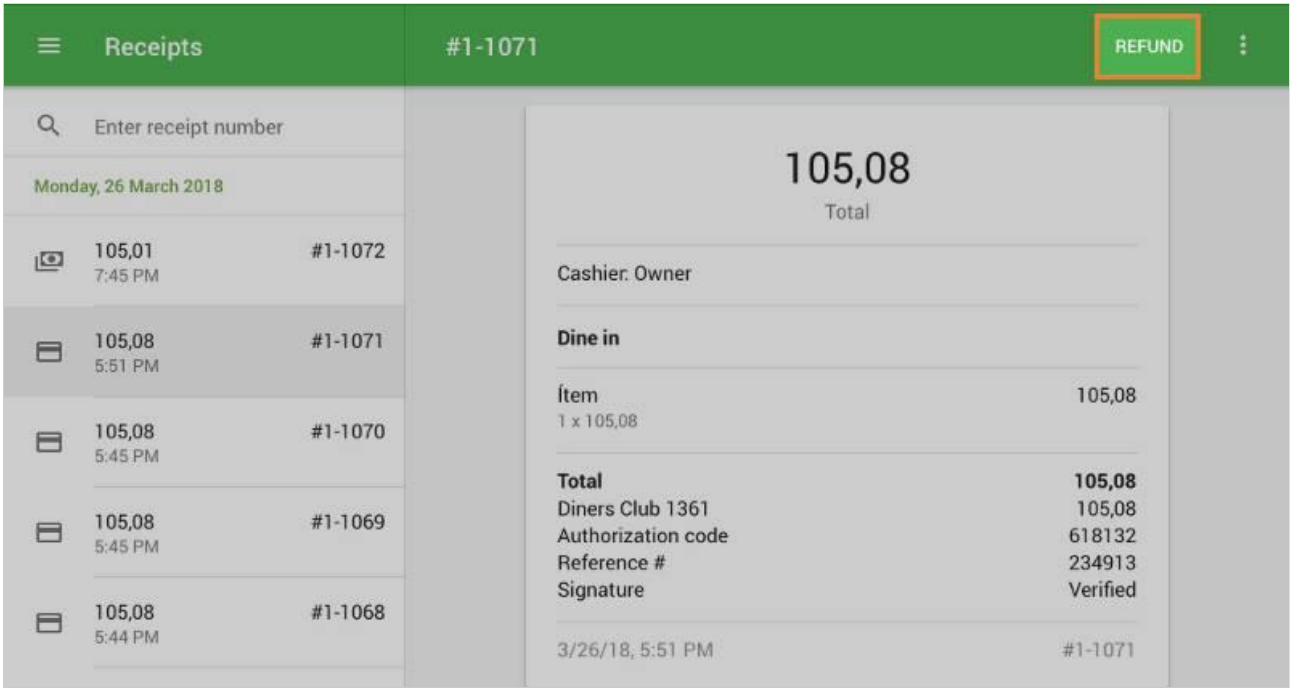
In case of an error in the transaction, Loyverse POS will show an error message.



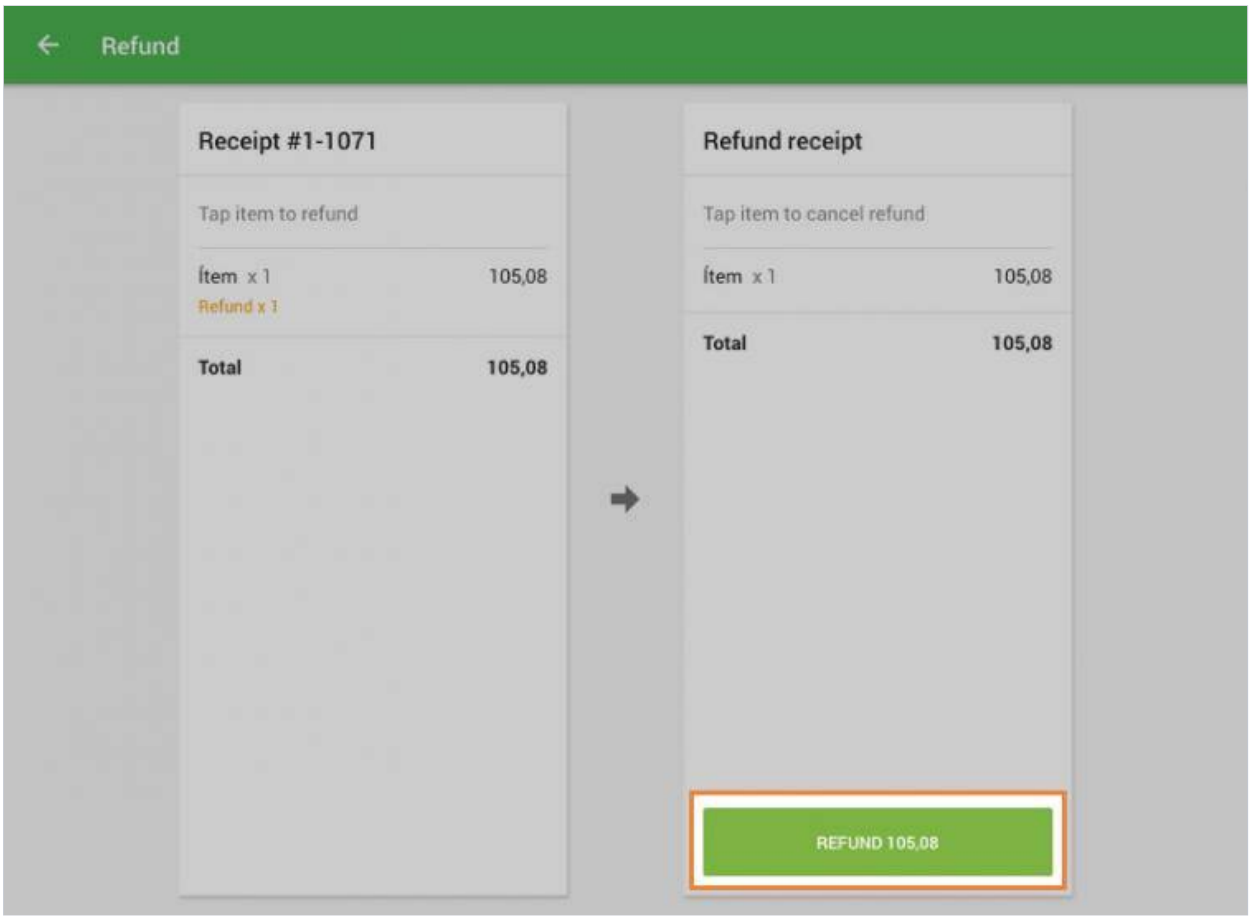
Tap the back arrow to return to the selecting payment type screen. You can ask the customer to choose a different type of payment (for example ‘Cash’) or try another card.

Refund

You can refund the ticket fully or partially.
In Loyverse POS, go to ‘Receipts’ menu, and tap on the receipt you would like to refund.
Tap ‘Refund’.



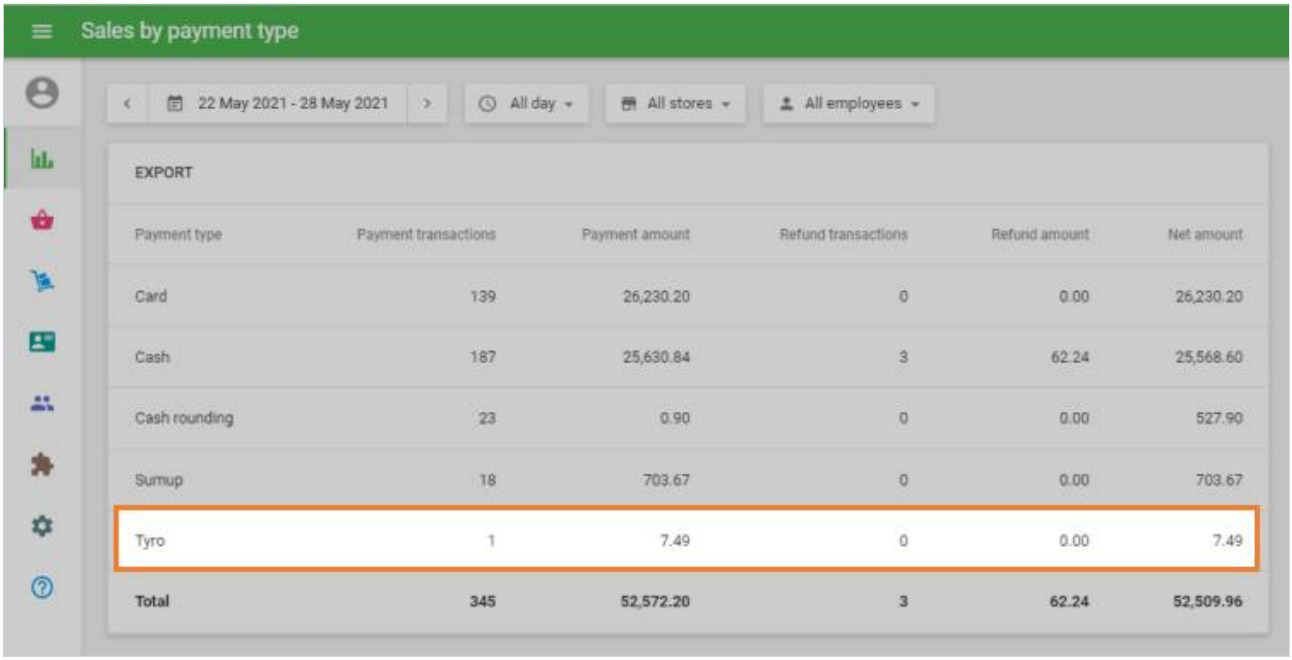
Tap on the items you would like to refund from the left ticket to move them to the 'Refund receipt' list on the right side, and then tap the 'Refund' button.



Follow the instructions on the 'Refund' screen to complete the refund.

Reports

You can view the total number of transactions performed with the Tyro payment type. In the Back Office, select the ‘Sales by payment type’ report.



See also:

Configuring Payment Types in Loyverse POS

How to Work with Credit Card Payments

How to Accept Credit Cards with Loyverse POS and Yoco

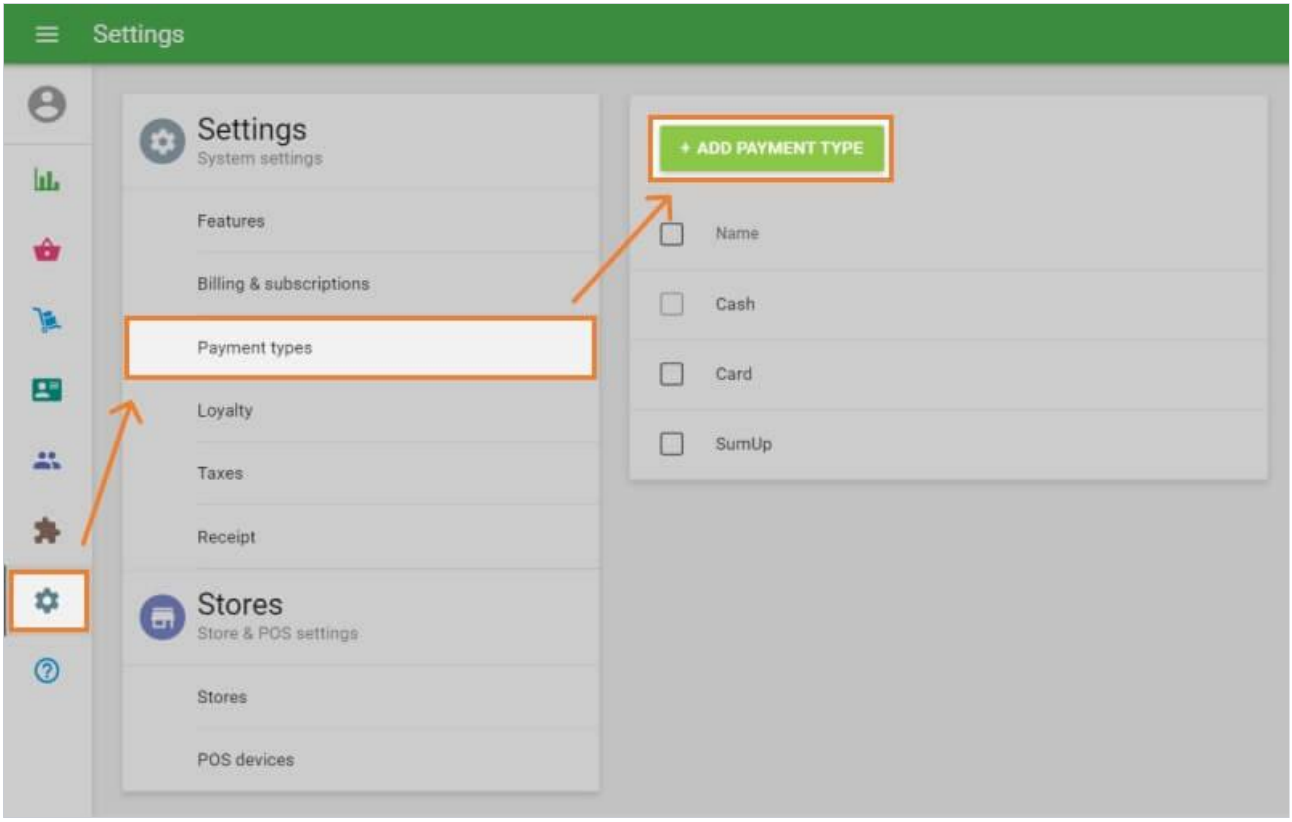
This feature only works on iOS devices.

Loyverse POS merchants can accept credit card payments via Yoco, and it is available to customers in South Africa.

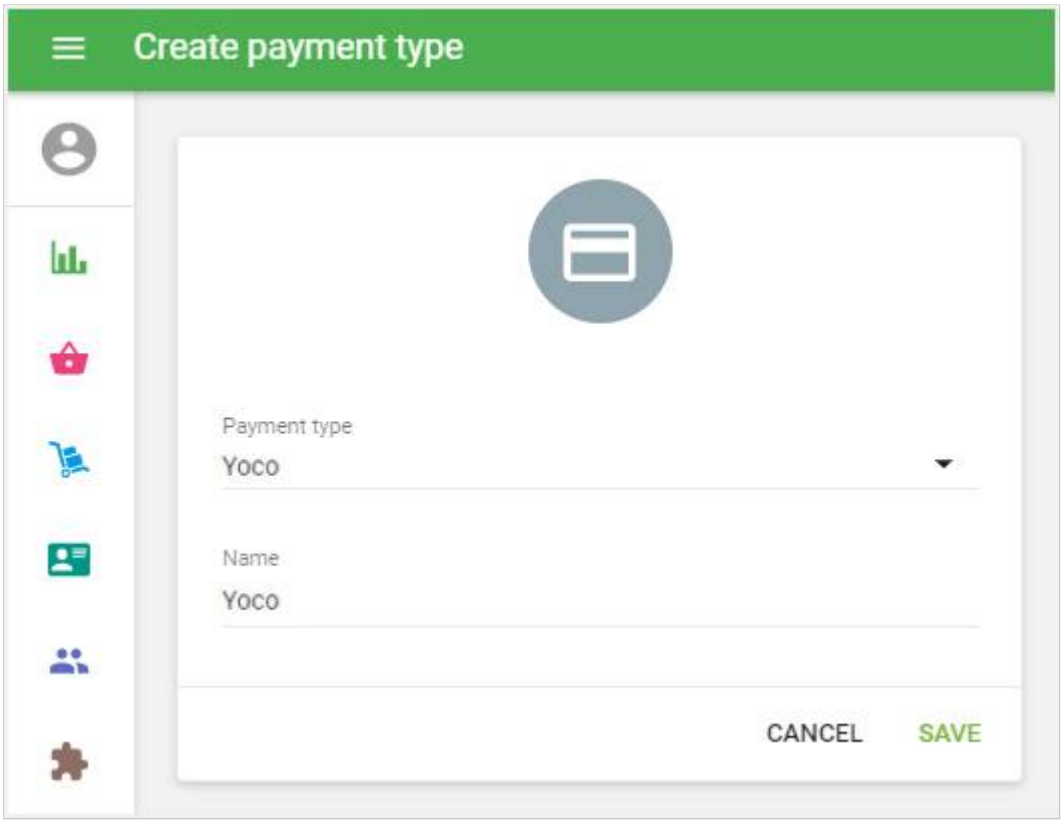
Before connecting a card reader, you need to create an account in Yoco and receive the device. Integration with Loyverse POS works on the card readers YOCO PRO, YOCO-GO, YOCO-Neo, and YOCO-Neo Touch.

1. Connecting the Card Reader

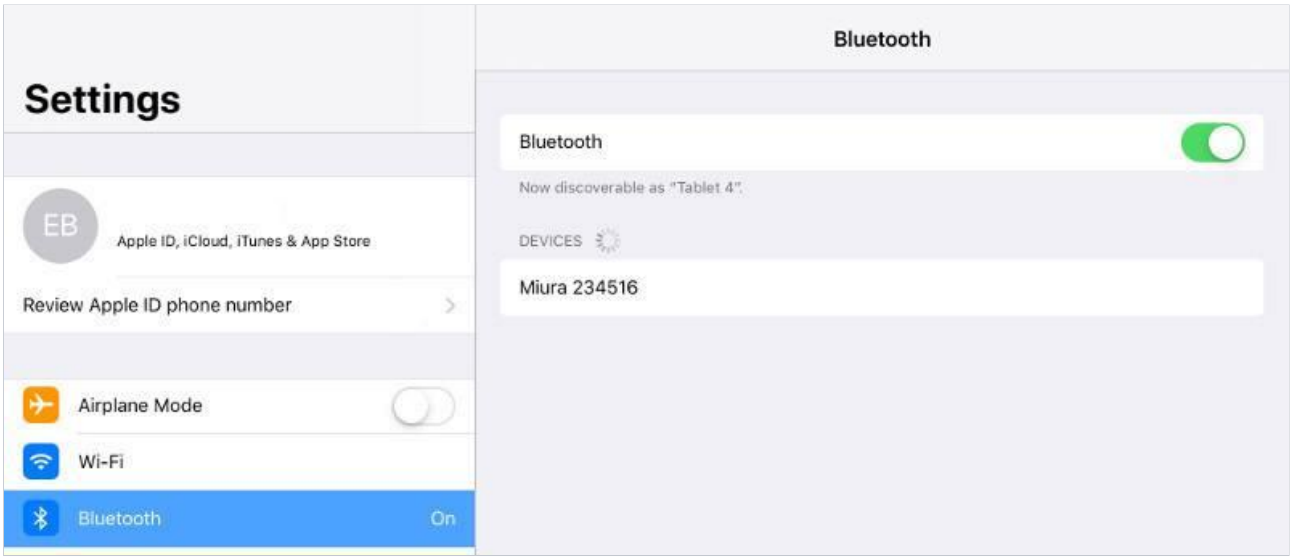
Log in to the Back Office, click the ‘Settings’ menu and then ‘Payment types.' Click the ‘Add payment type’ button to add a new type of payment.



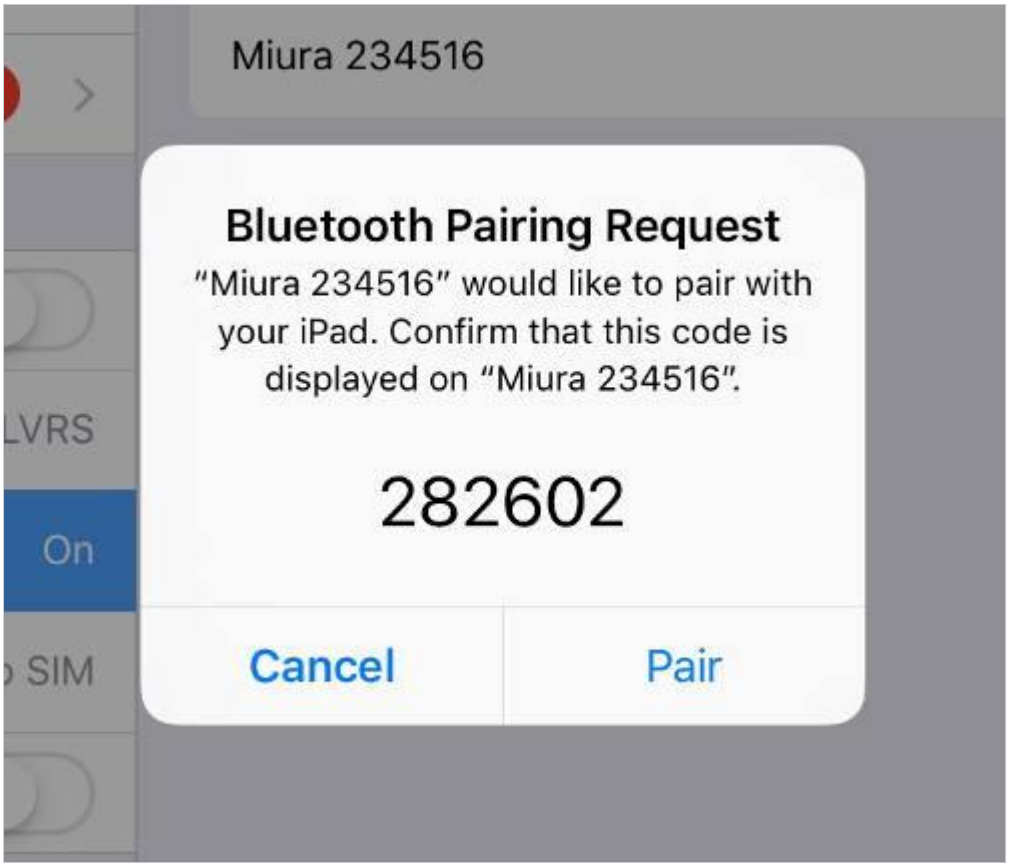
In the ‘Create payment type’ window, select the ‘Yoco’ payment type from the drop-down list. Save your changes when done.



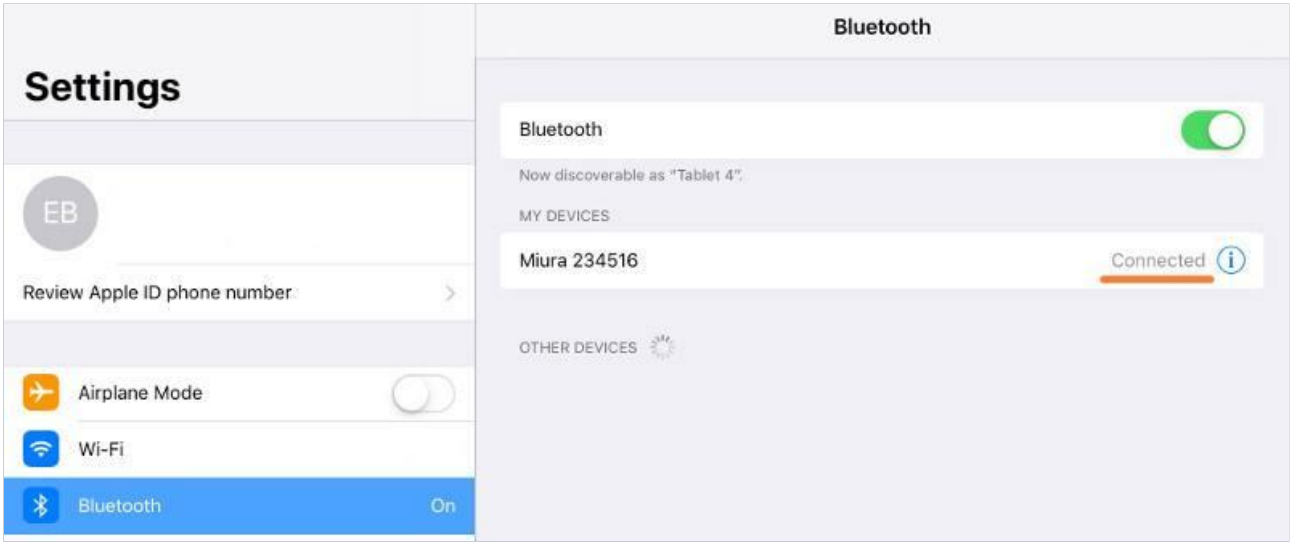
Turn on your Yoco card reader. On your mobile device, go to the Settings and turn on the Bluetooth. You will see the Yoco card reader in the devices list.
Tap on the Yoco device to connect.



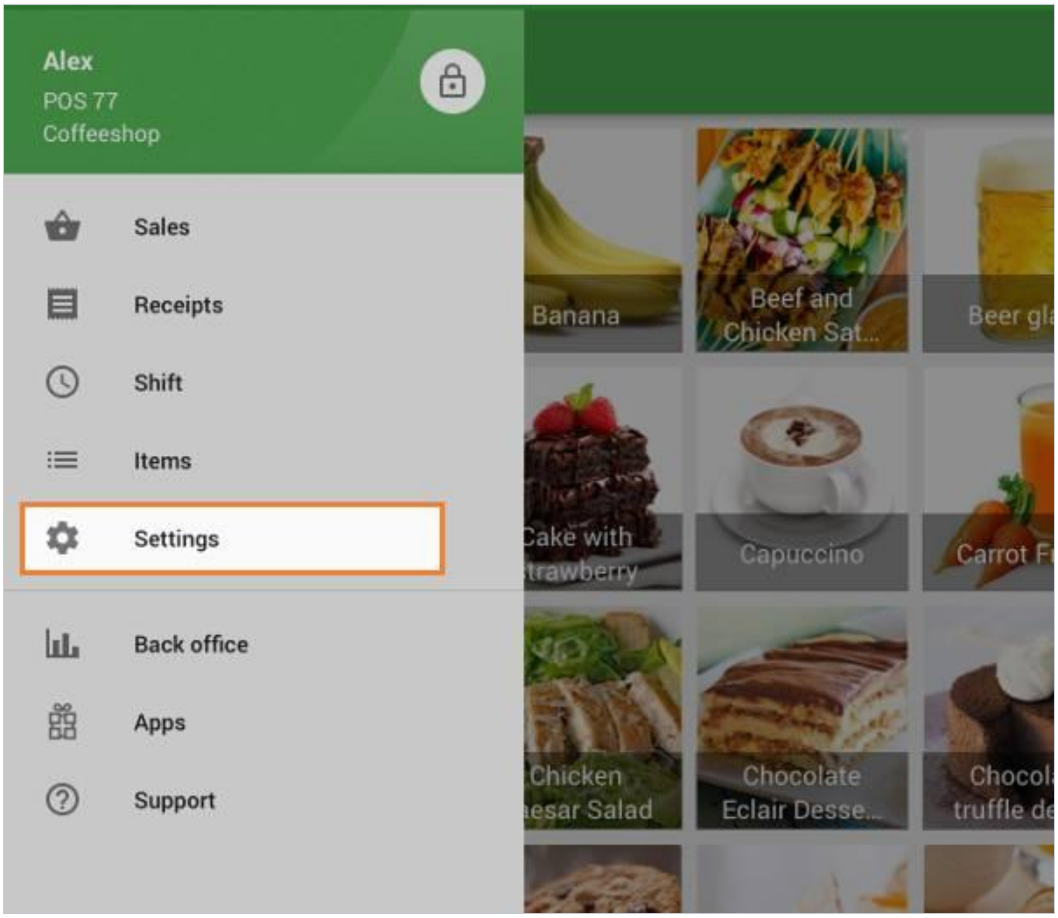
Tap the ‘Pair’ button on the mobile device and ‘OK’ on the card reader.



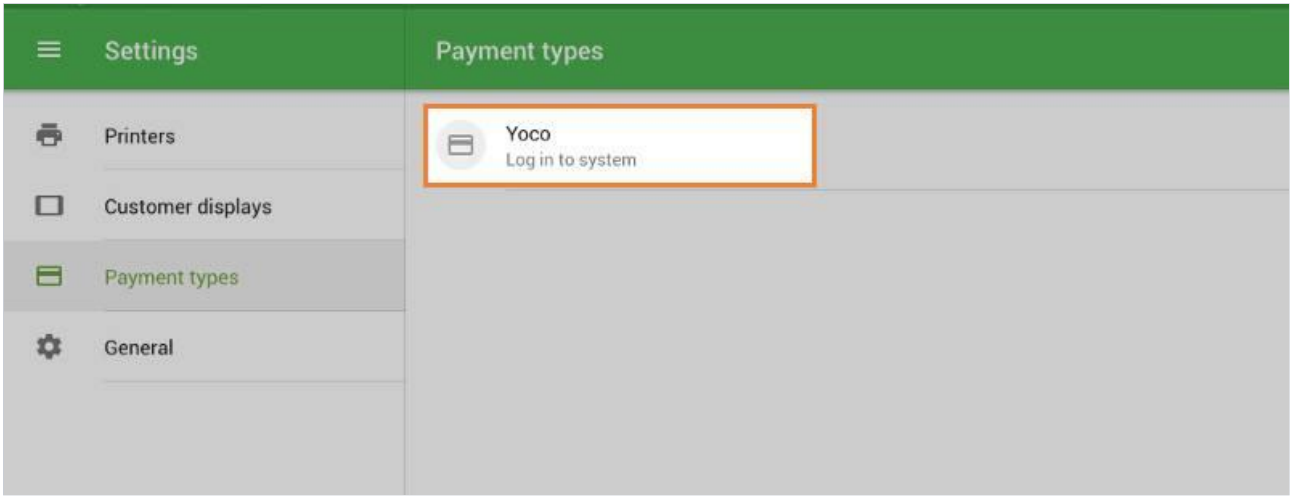
The device will change its status to ‘Connected’.



Then launch the Loyverse POS and go to Settings > Payment Types.

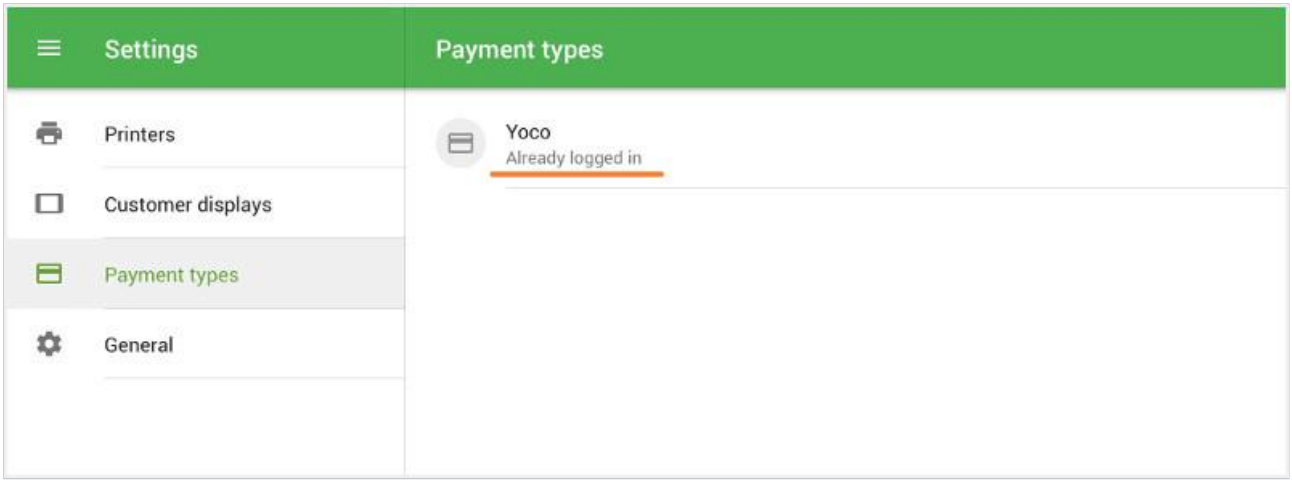


Tap the 'Yoco' button for account settings.



Login in to your Yoco account by entering the Email and Password, then tap ‘Login’.

You will see the logged-in status of your Yoco account.



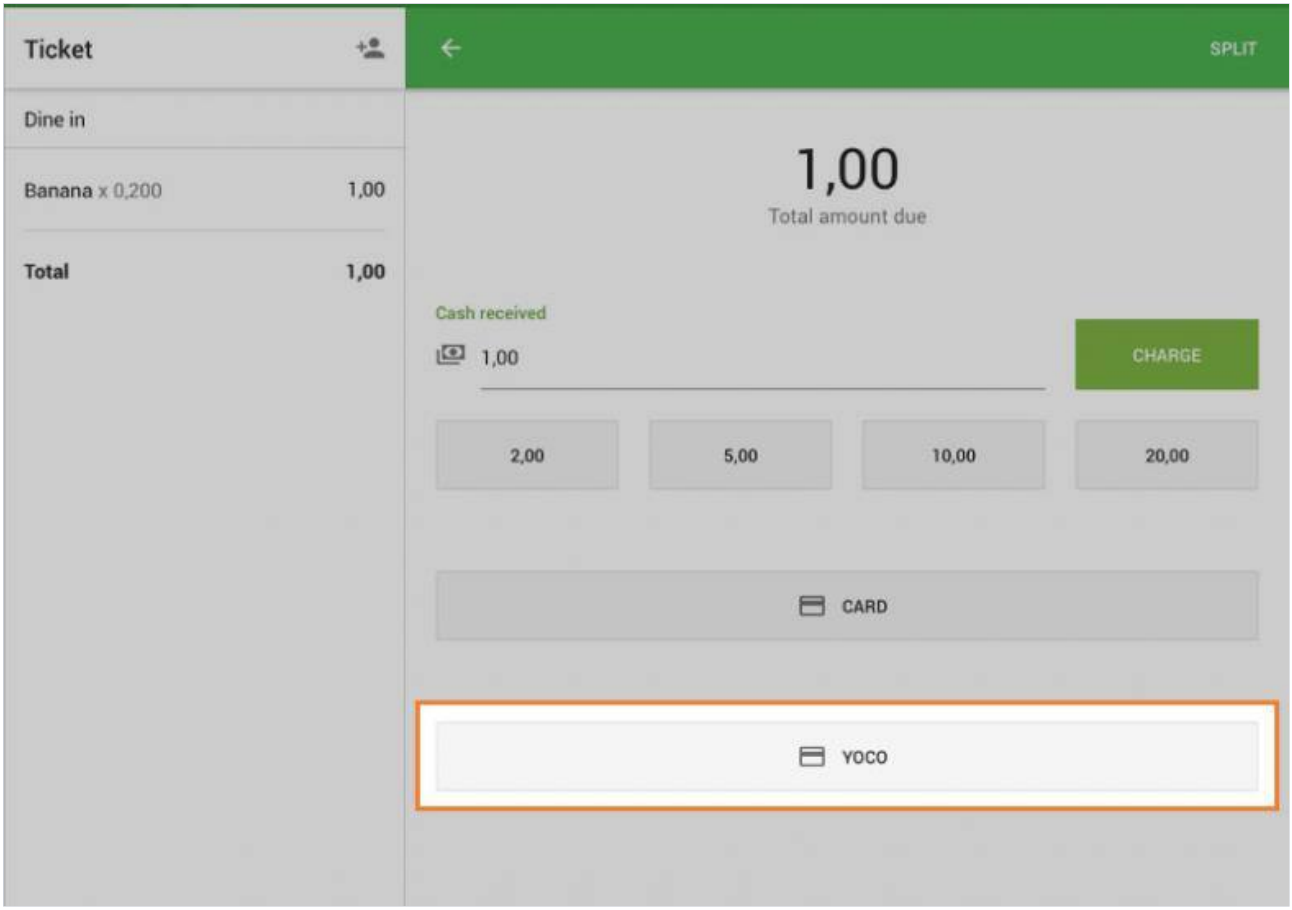
Now you are ready to accept card payments.

2. Processing Payments

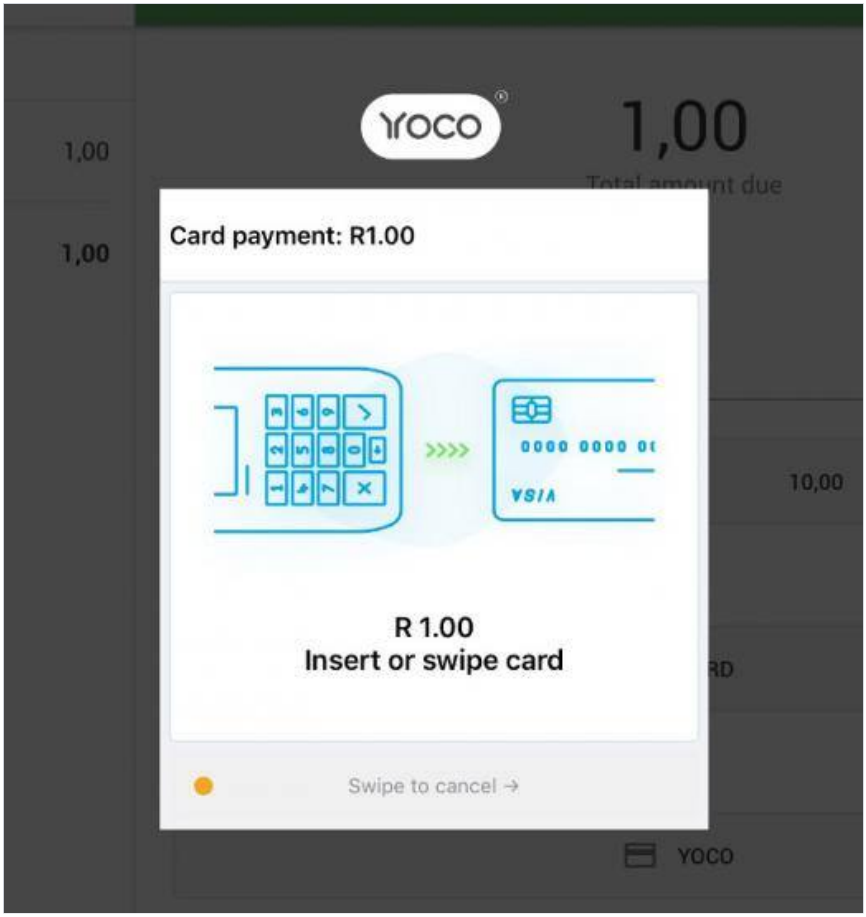
Payment

Add items to the ticket and press ‘Charge’.

Tap ‘Yoco’ as the payment type.



Loyverse POS will wait for a response from the card reader, and you will see an invitation to insert/swipe card on the card reader.



Insert the card with a chip into the bottom slot or swipe at the top slot of the card reader and give it to the customer to enter the PIN.


YOCO
MIURA
1
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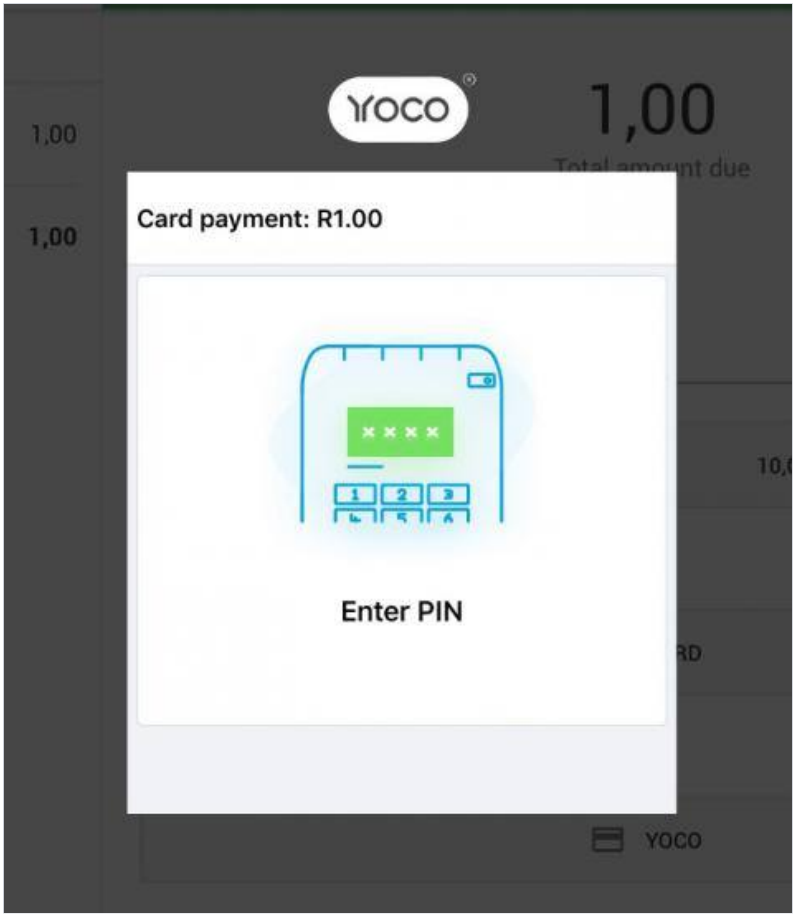
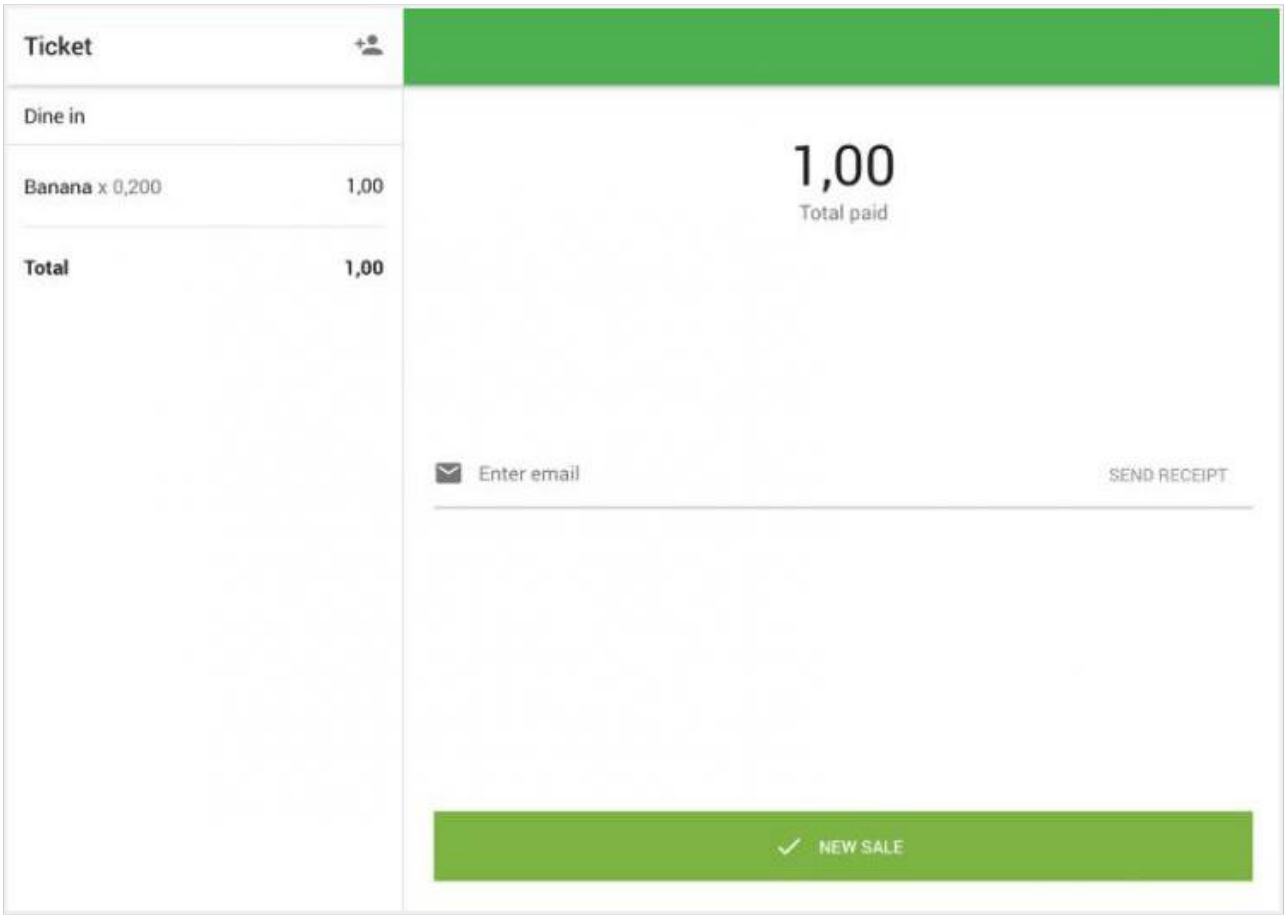
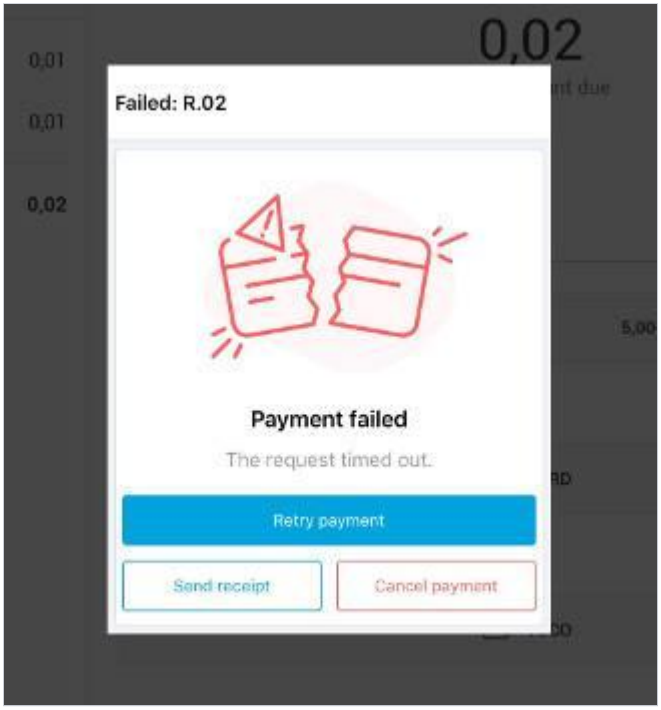

1,00
1,00
YOCO
1,00
Total amount due
Card payment: R1.00
Enter PIN
YOCO

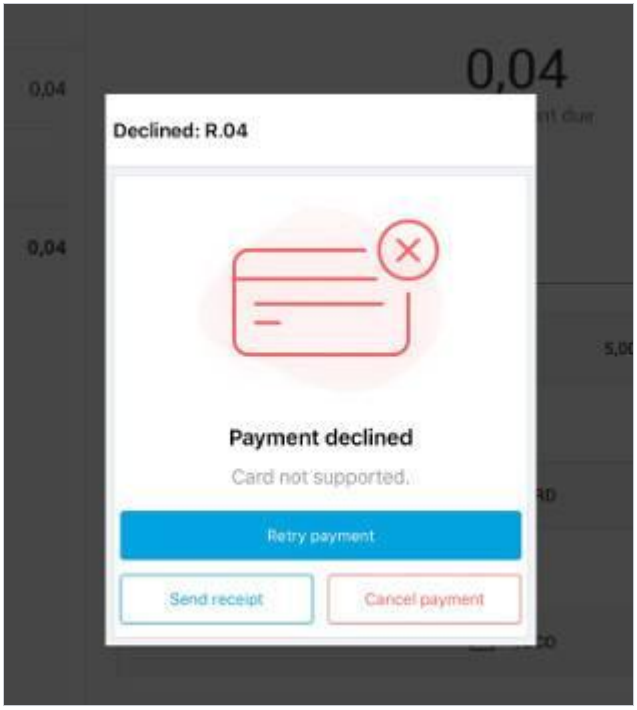
If the transaction is successful, you will see the ‘payment approved’ window. Tap ‘Done’ to continue.

Loyverse POS will display the screen with 'Total paid amount'.



In case of an error in the transaction, you will see an error message.





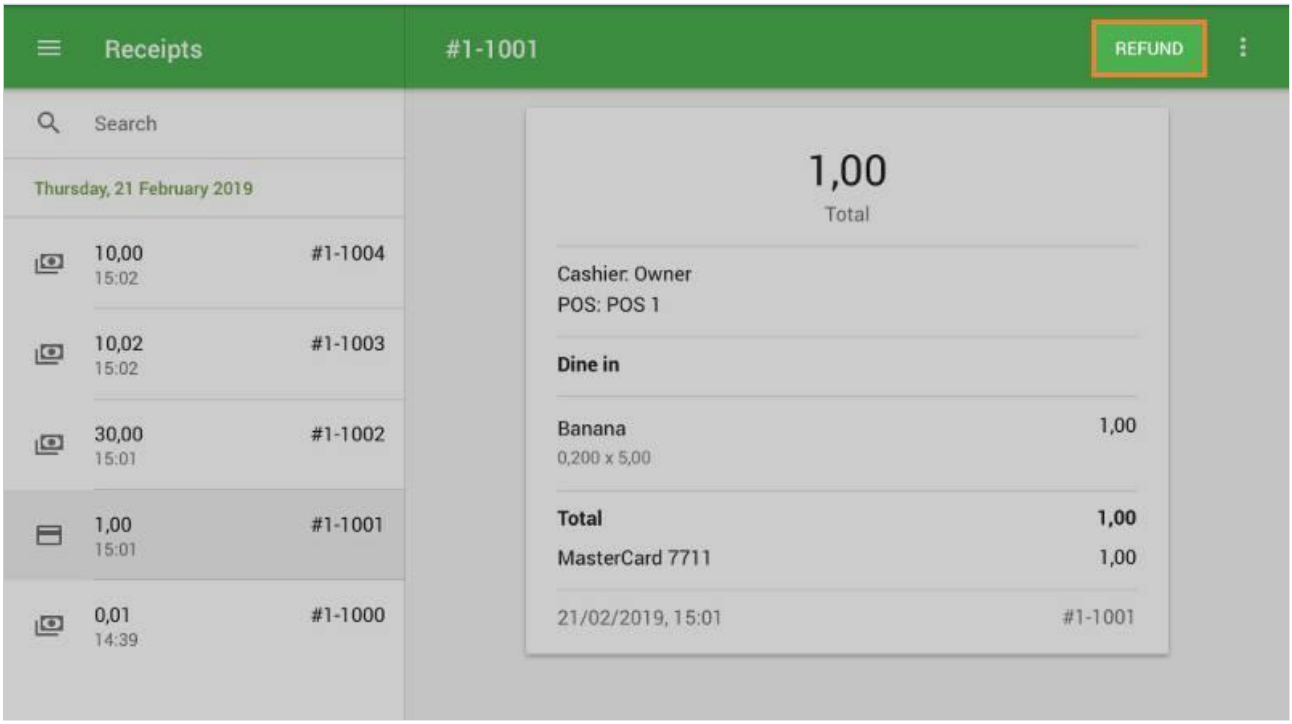
You can retry the payment or tap the ‘Cancel payment’ button. In this case, you will return to the ‘select payment type’ screen. You can ask the customer to choose a different type of payment (for example ‘Cash’) or try another card.

Refund

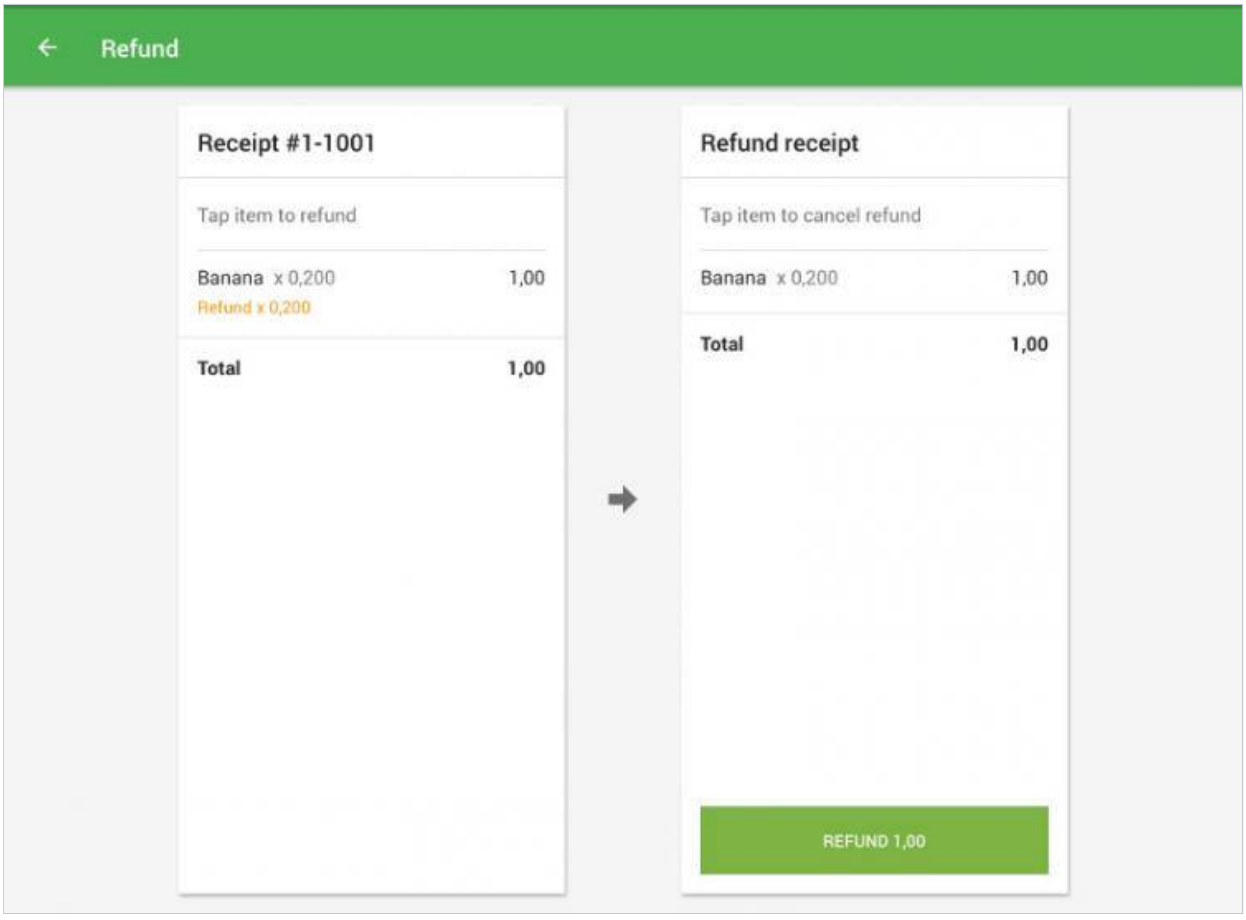
You can only refund the whole amount of the transaction. The card reader is not used in the refund process.

In the Loyverse POS, go to the ‘Receipts’ menu, and tap on the desired receipt.

Then tap ‘Refund’.



Select all items on the receipt that were paid via card (on the left side) to move them to the ‘Refund receipt’ list (on the right side), and tap the ‘Refund’ button.

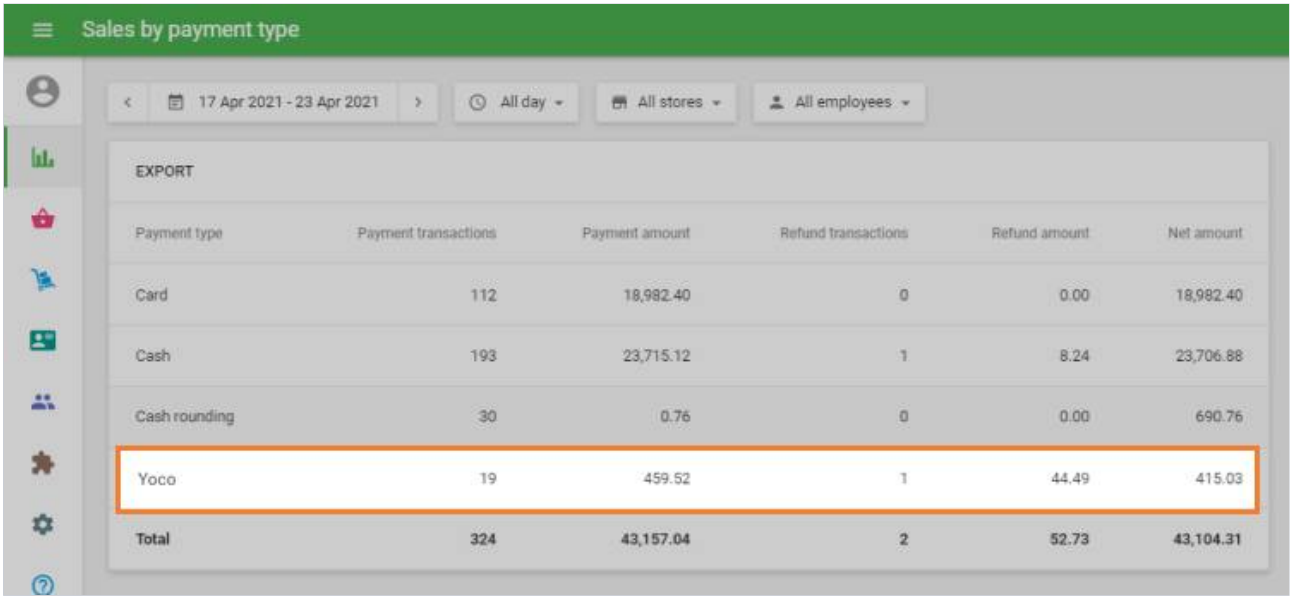


At the ‘Authorise refund’ screen, type in the Yoco Email and password and tap ‘Authorise’.



3. Reports

You can view the total number of transactions performed with Yoco. In the Back Office, select the ‘Sales by payment type’ report.



Payment type	Payment transactions	Payment amount	Refund transactions	Refund amount	Net amount
Card	112	18,982.40	0	0.00	18,982.40
Cash	193	23,715.12	1	8.24	23,706.88
Cash rounding	30	0.76	0	0.00	690.76
Yoco	19	459.52	1	44.49	415.03
Total	**324**	**43,157.04**	**2**	**52.73**	**43,104.31**

How to Accept Credit Cards with Loyverse POS and Shift4

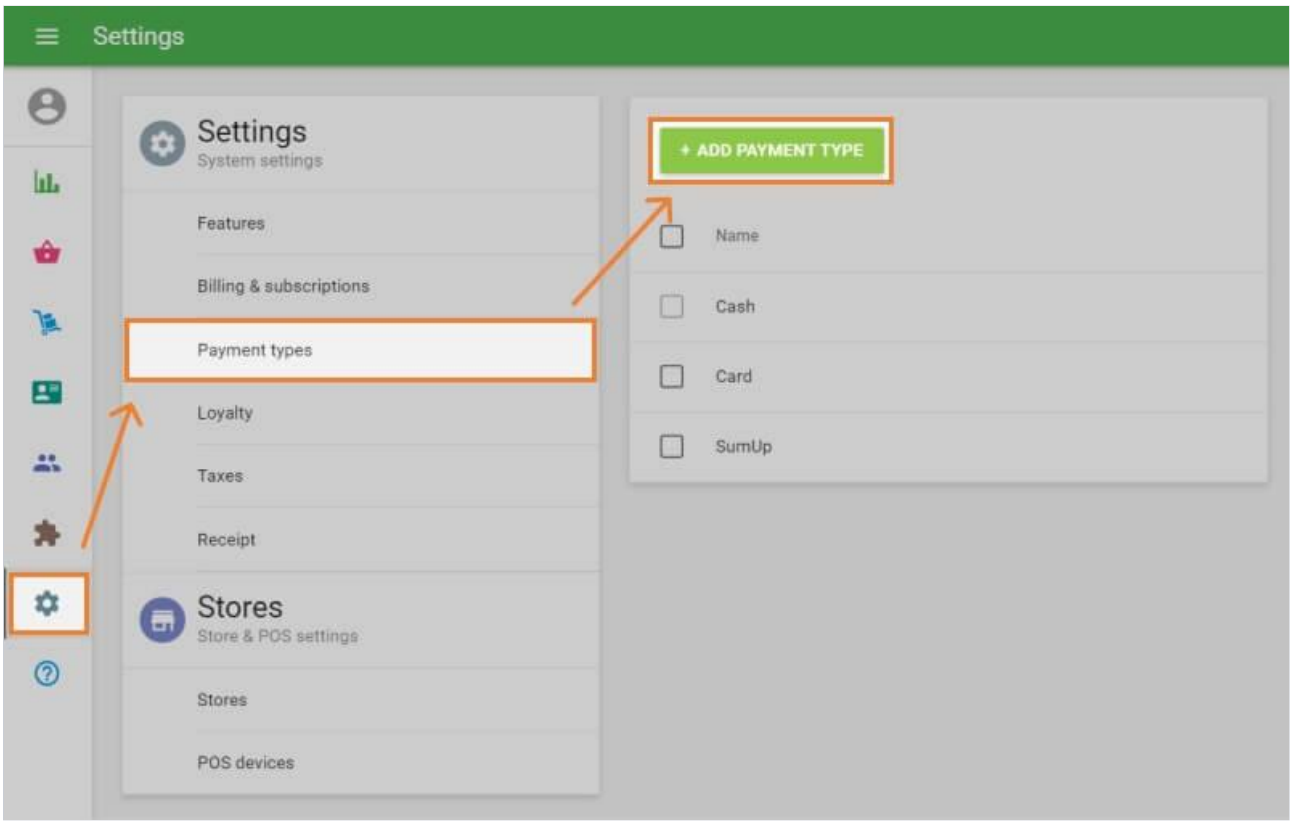
This feature only works on iOS devices.

Loyverse POS merchants can accept credit card payments via Shift4 (formerly Smartpay), and it is available to customers in Australia and New Zealand.

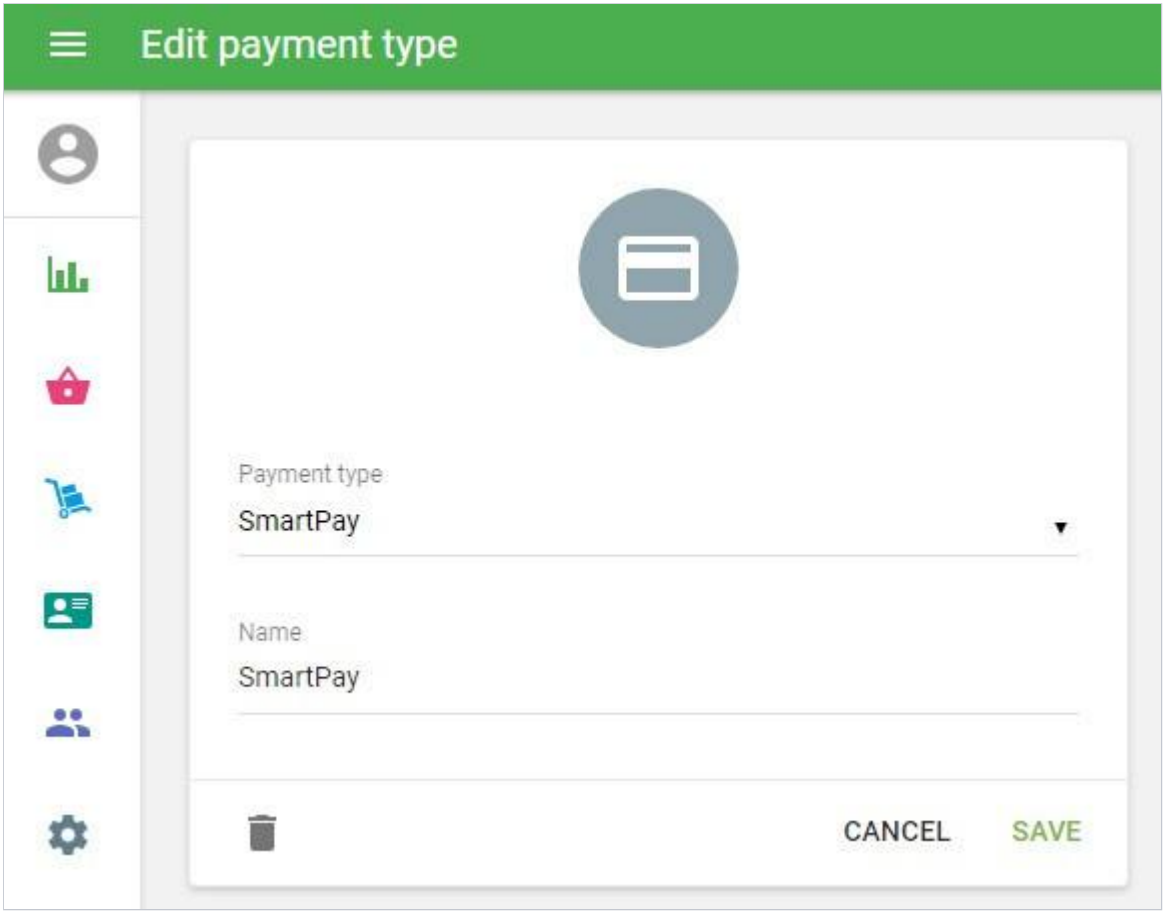
Before connecting a terminal, you need to create an account in Shift4 and receive the device. Integration with Loyverse POS works on the terminals S800 and S920 for New Zealand and D210e for Australia.

1. Connecting the terminal

Log in to the Back Office, click the ‘Settings’ menu and then ‘Payment types.' Click the ‘Add payment type’ button to add a new type of payment.



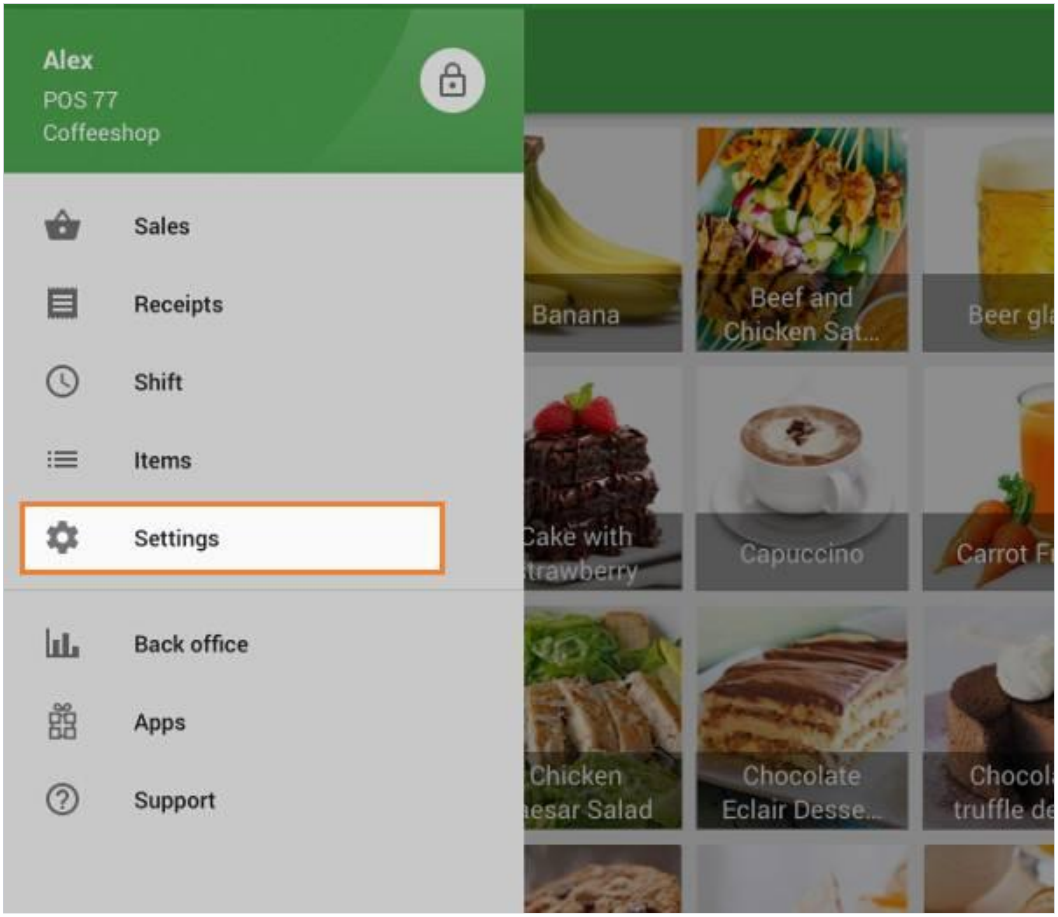
In the ‘Add Payment Type’ window, select the ‘Smartpay’ payment type from the drop-down list. Save your changes when done.



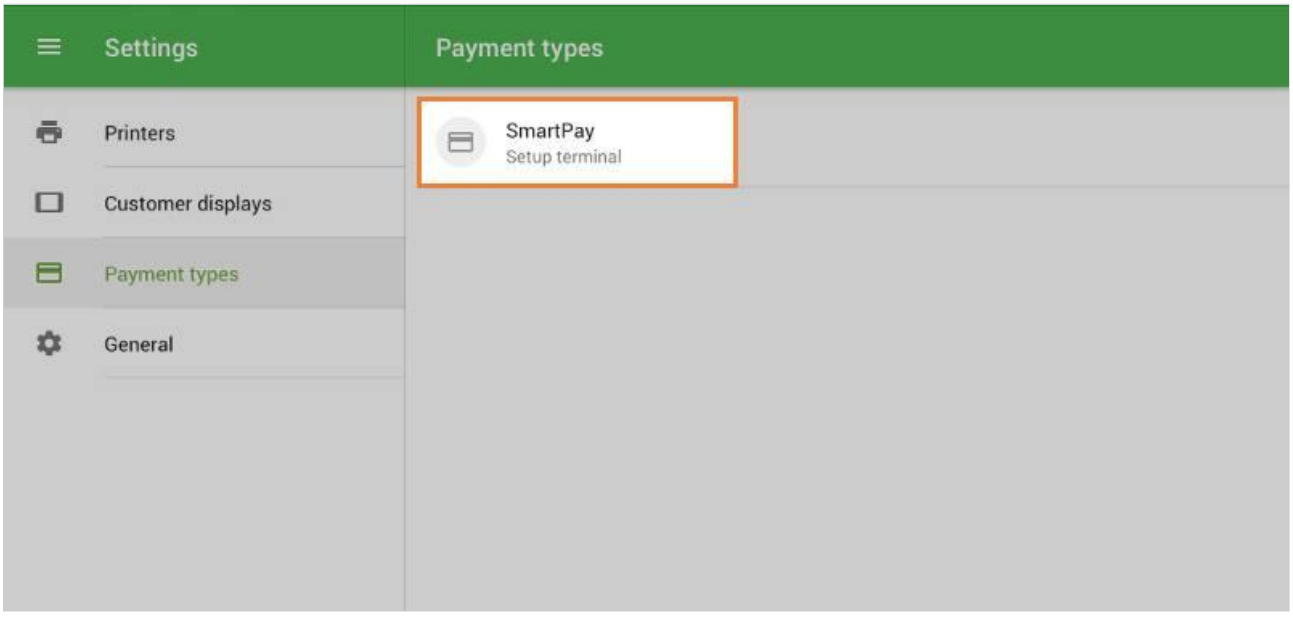
Turn on your Shift4 terminal and connect it to the Internet.

Get the pairing code from the terminal:
At the terminal, go to the section ‘Smart Connect EFTPOS’ - it should be in ‘Online’ mode. Press Menu and select option 3 CONFIG and enter 833767. Then press the Enter button. Select option 1 POS INTEGRATIONS and then 1 AUTHORISE POS. You will see a new pairing code.

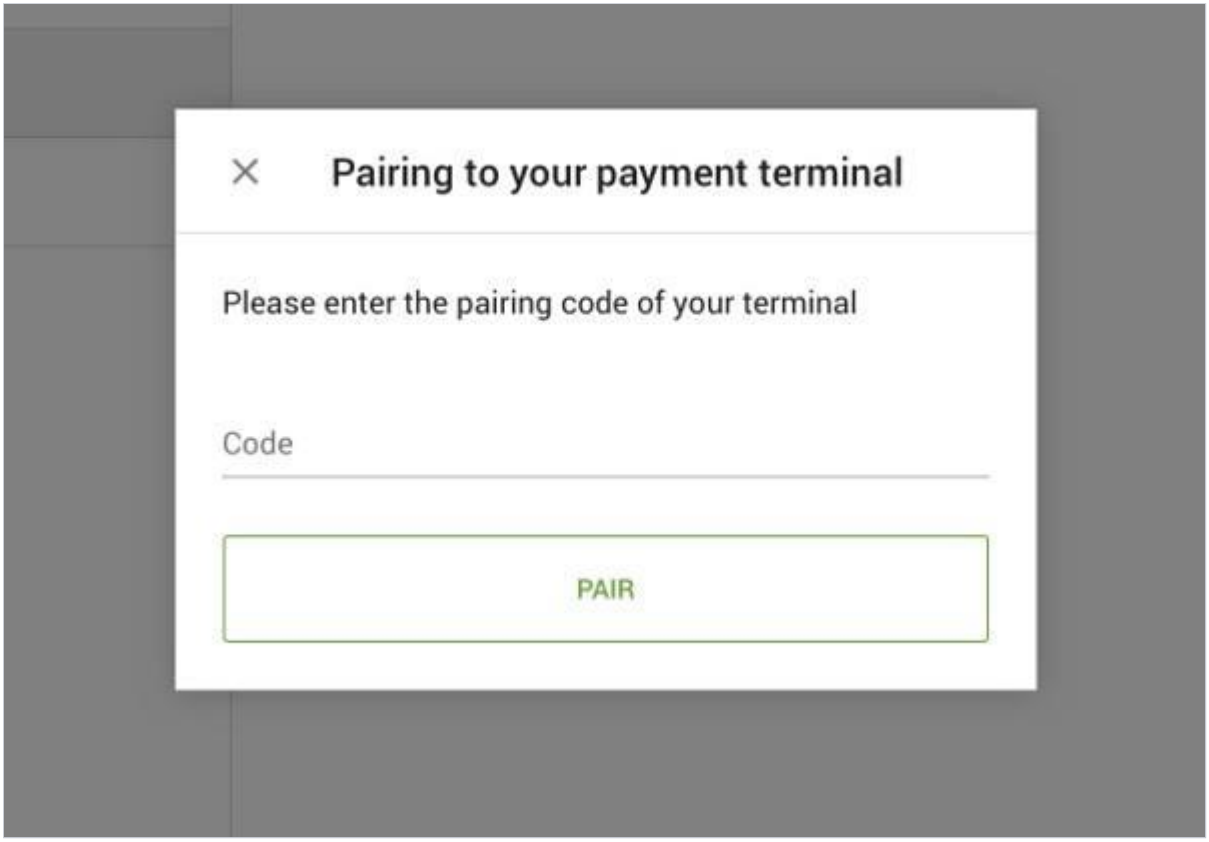
Then launch the Loyverse POS and go to Settings > Payment Types.



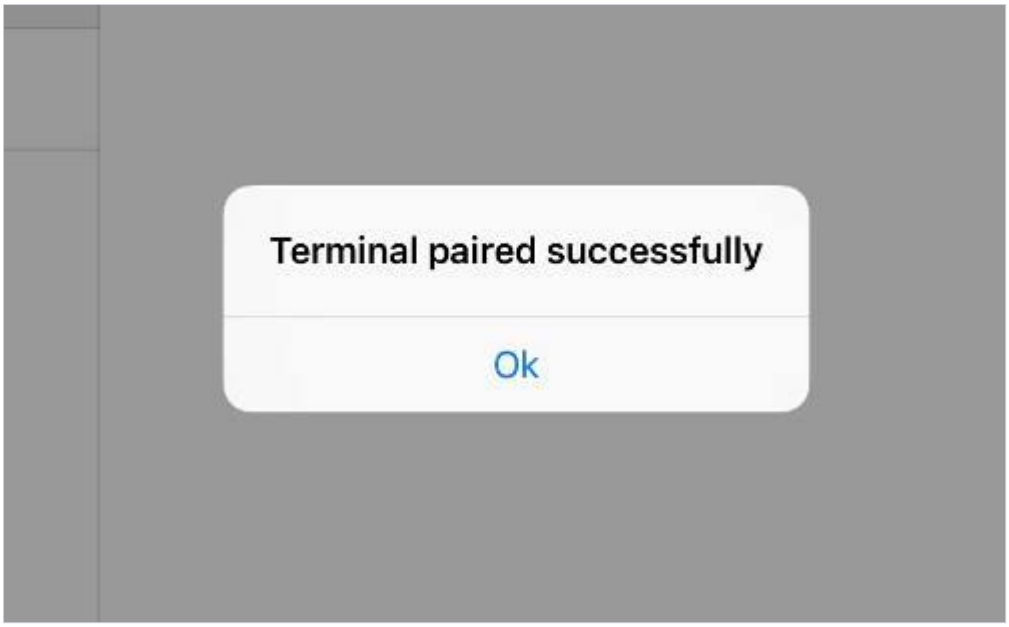
Tap the ‘Smartpay’ button for account settings.



Enter your pairing code from the terminal and tap ‘Pair’.



Tap ‘OK’ to confirm pairing.



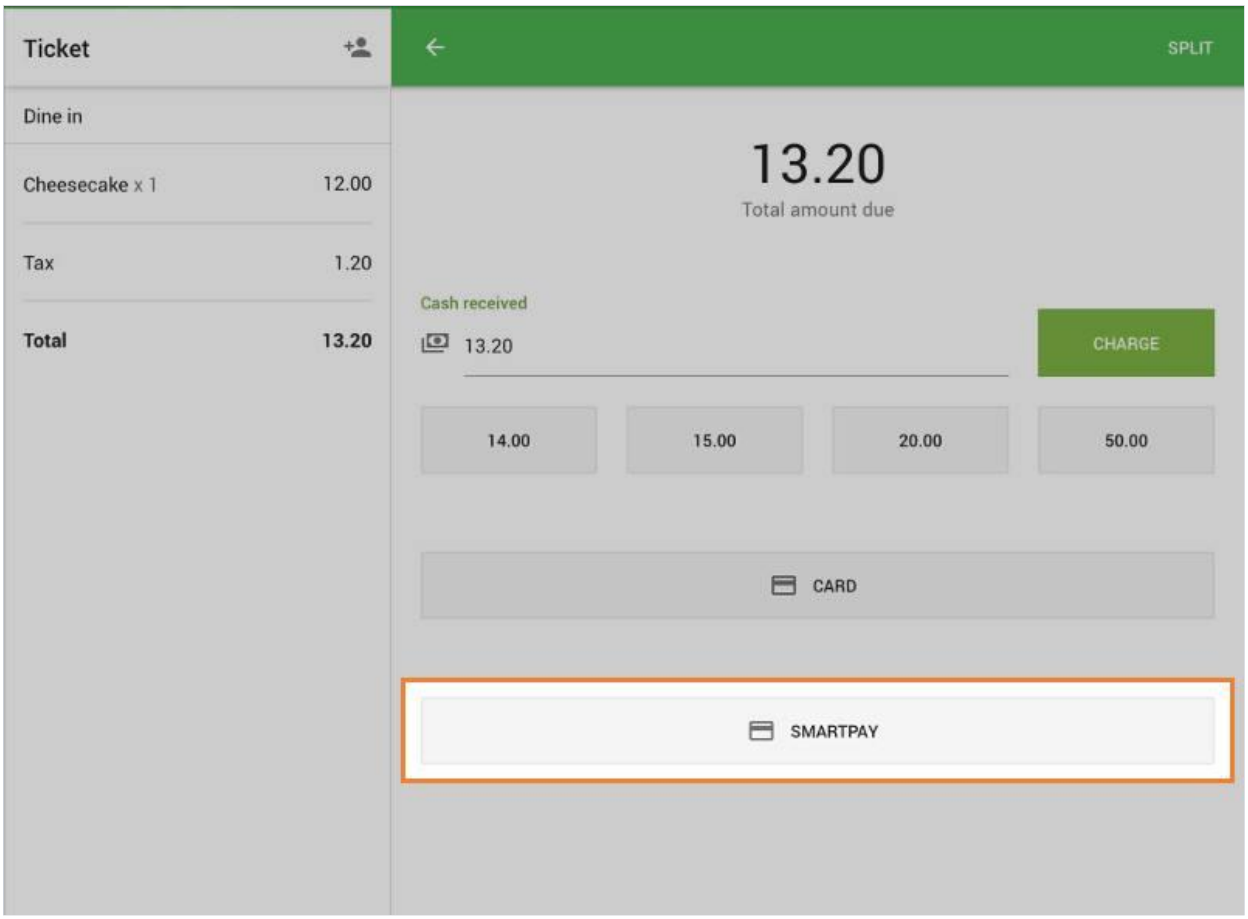
On the terminal, you have to return to the ‘Smart Connect EFTPOS’ section. It should be shown that the terminal is in ‘Online’ mode.
Now you are ready to accept card payments.

2. Processing Payments

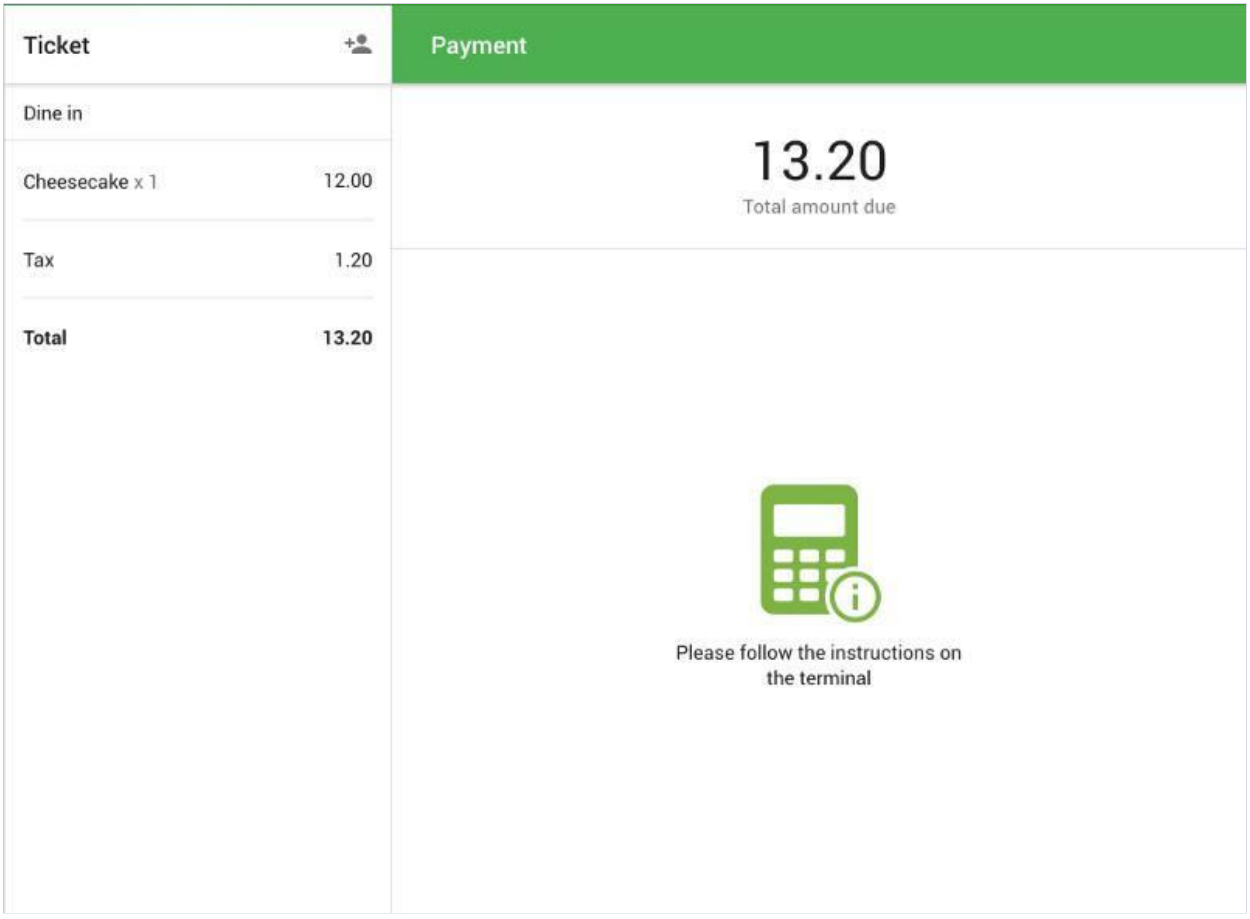
Payment

Add items to the ticket and press ‘Charge’.

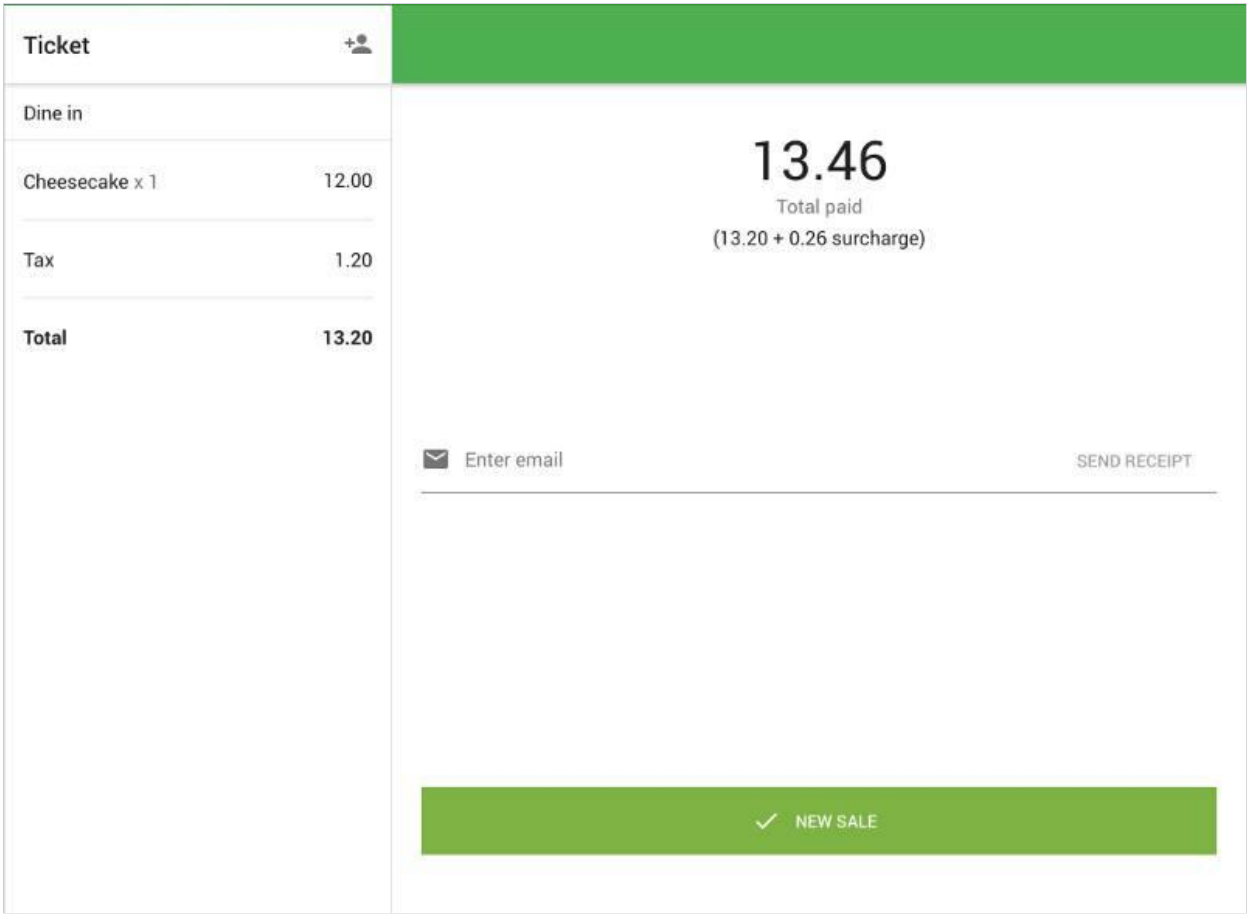
Tap the ‘Smartpay’ button as the payment type.



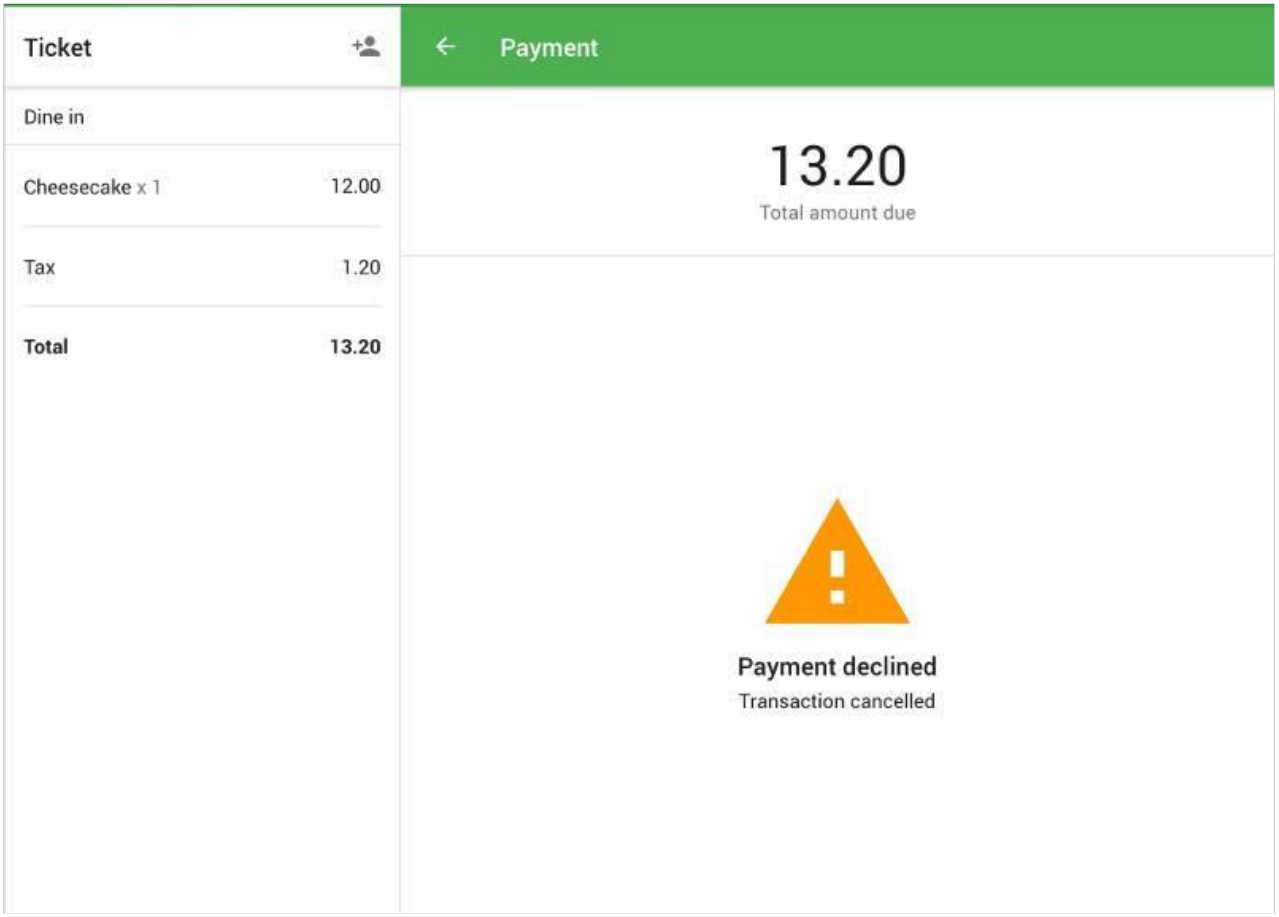
Loyverse POS will wait for a response from the terminal, and you will see an invitation to insert/ swipe card on the terminal.



If the transaction is successful, Loyverse POS will display the total paid amount on the screen, where you may then print the receipt, send the receipt to your email, or go to the new sale.



In case of an error in the transaction, Loyverse POS will display an error message and print the receipt for the canceled transaction.

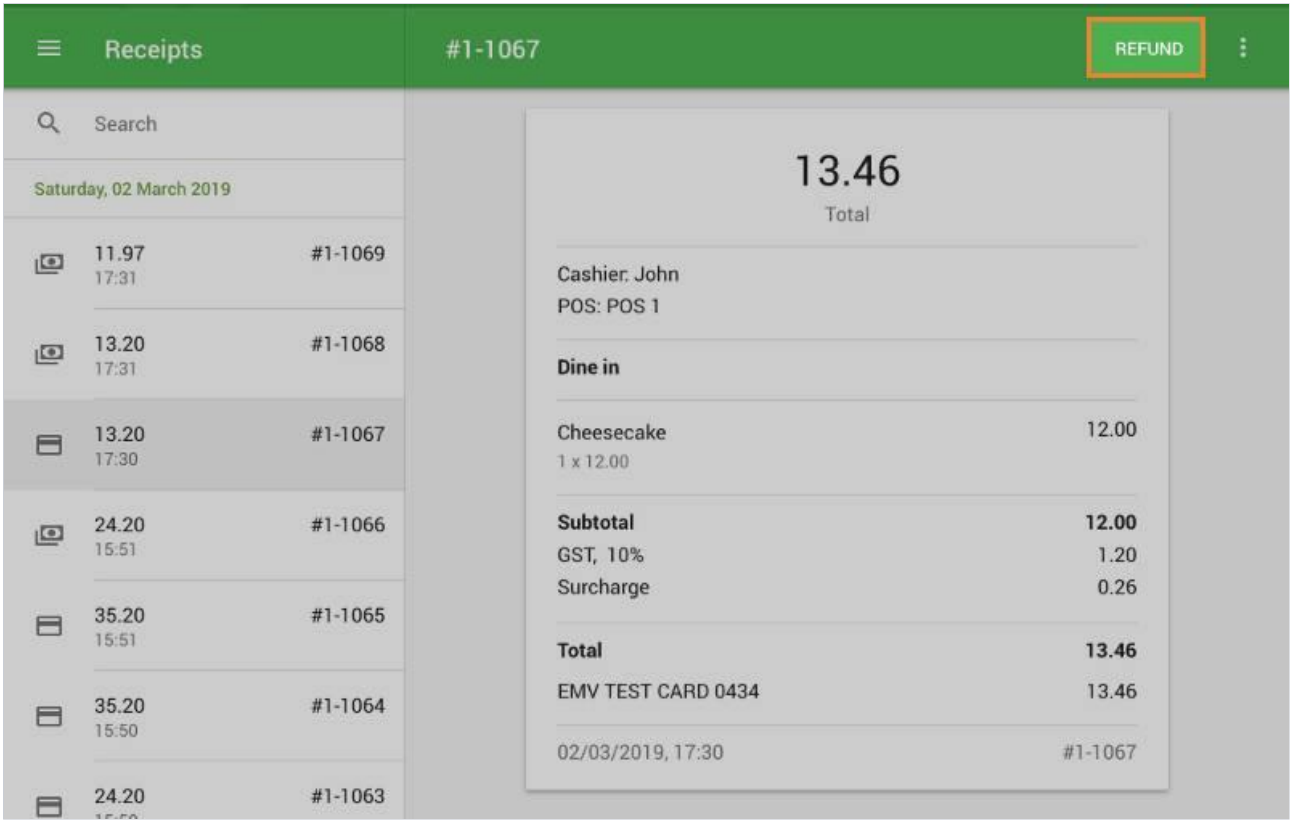


You can return to the ‘select payment type’ screen. You can ask the customer to choose a different type of payment (for example ‘Cash’) or try another card.

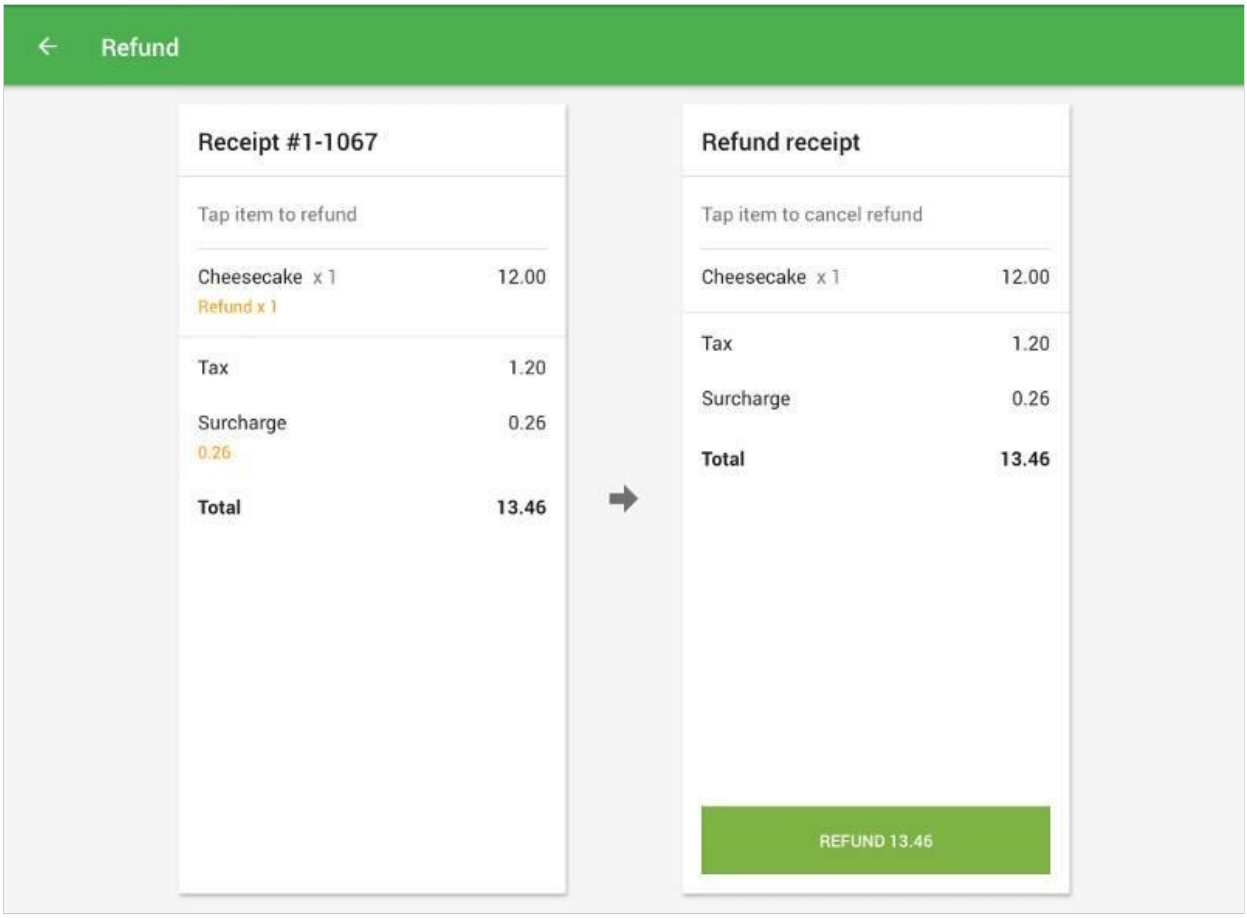
Refund

You can only refund the whole amount of the transaction. The terminal is not used in the refund process.

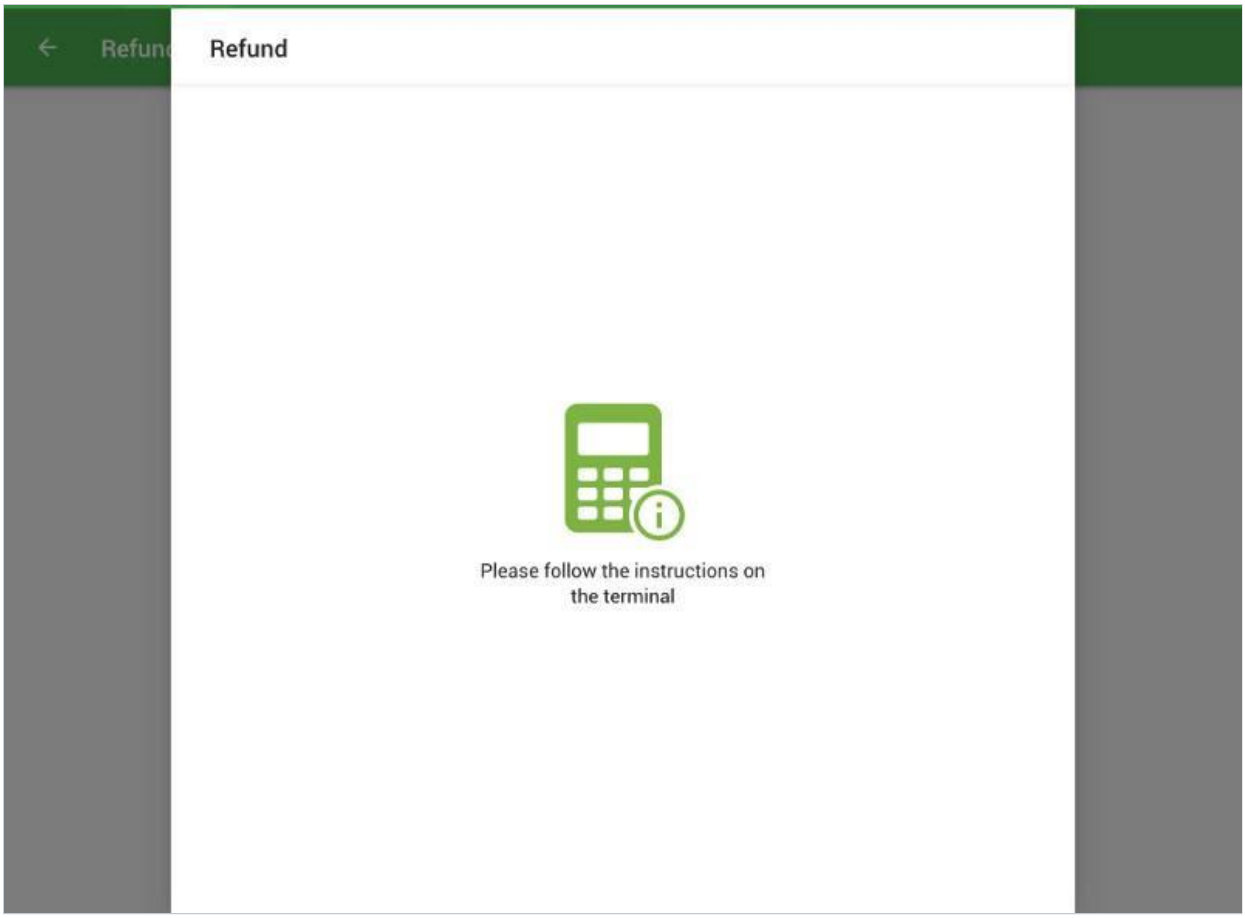
In the Loyverse POS, go to the ‘Receipts’ menu, and tap on the desired receipt.
Then tap ‘Refund’.



Select all items on the receipt that were paid via card (on the left side) to move them to the 'Refund receipt' list (on the right side), and tap the 'Refund' button.

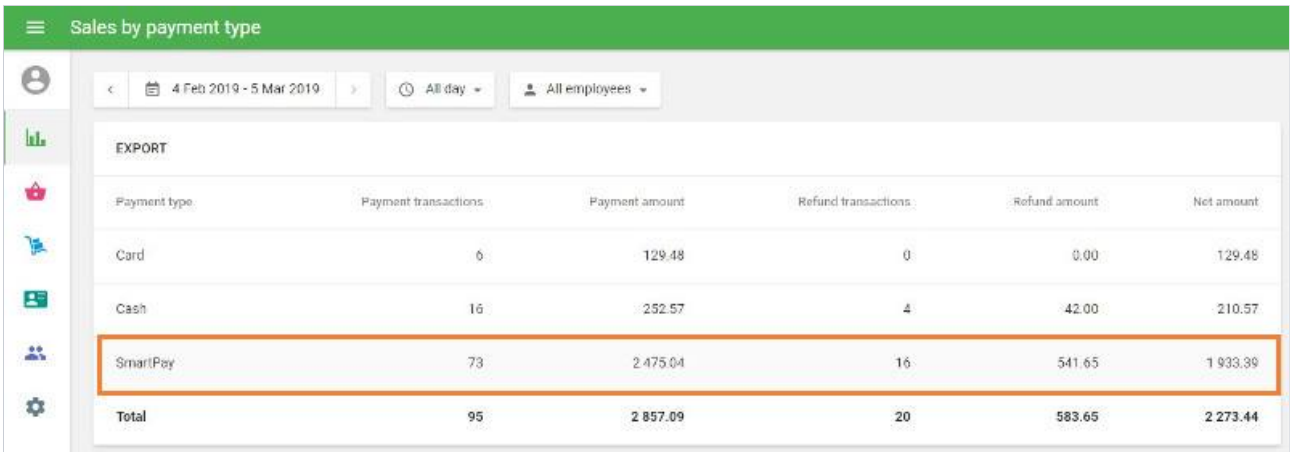


Follow the instructions on the terminal screen: swipe the manager card, enter the pin code, then insert the chip of the customer's card into the slot or swipe at the card reader.



Reports

You can view the total number of transactions performed with Shift4. In the Back Office, select the 'Sales by payment type' report.



How to Accept Credit Cards with Loyverse POS and Ezetap

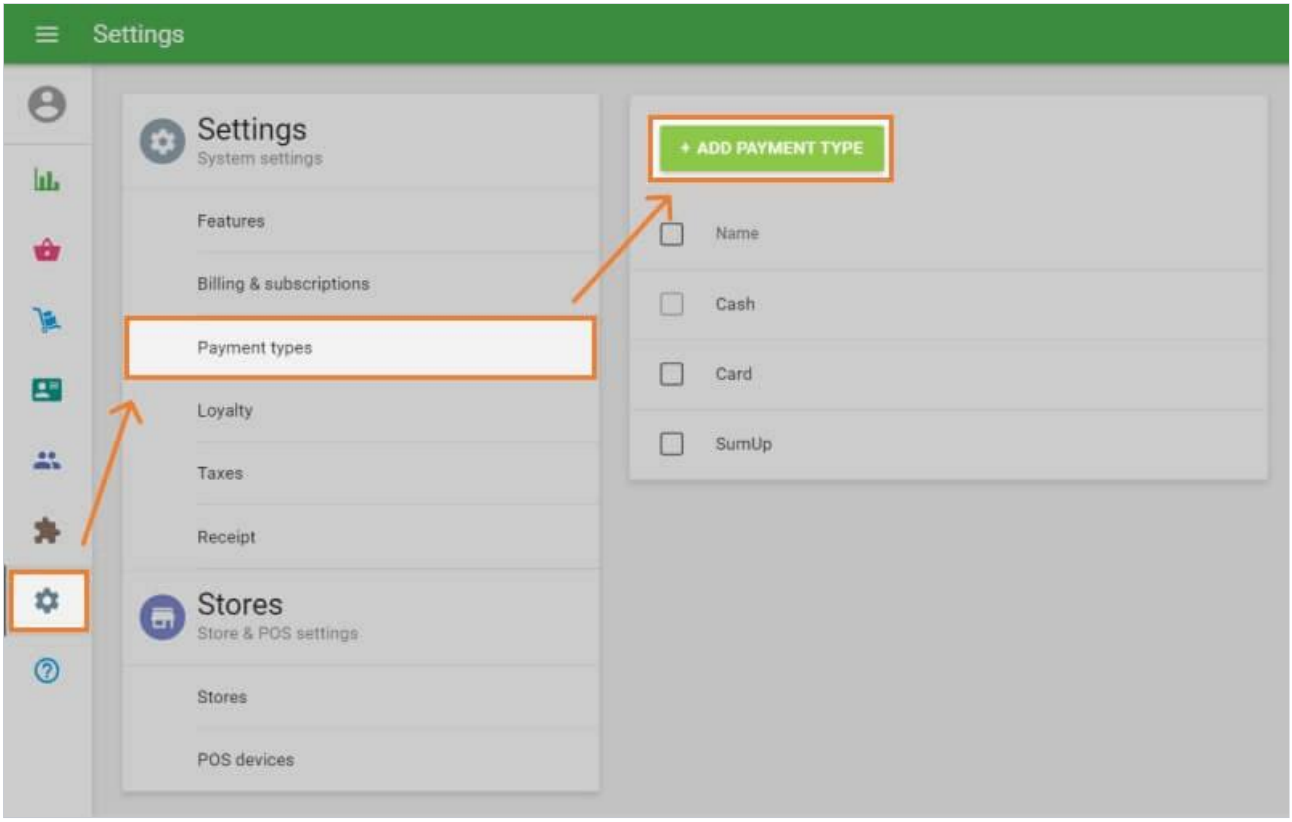
This feature only works on iOS devices. It is available in testing mode upon request.

Loyverse POS merchants can accept credit card payments via Ezetap, and it is available to customers in India only.

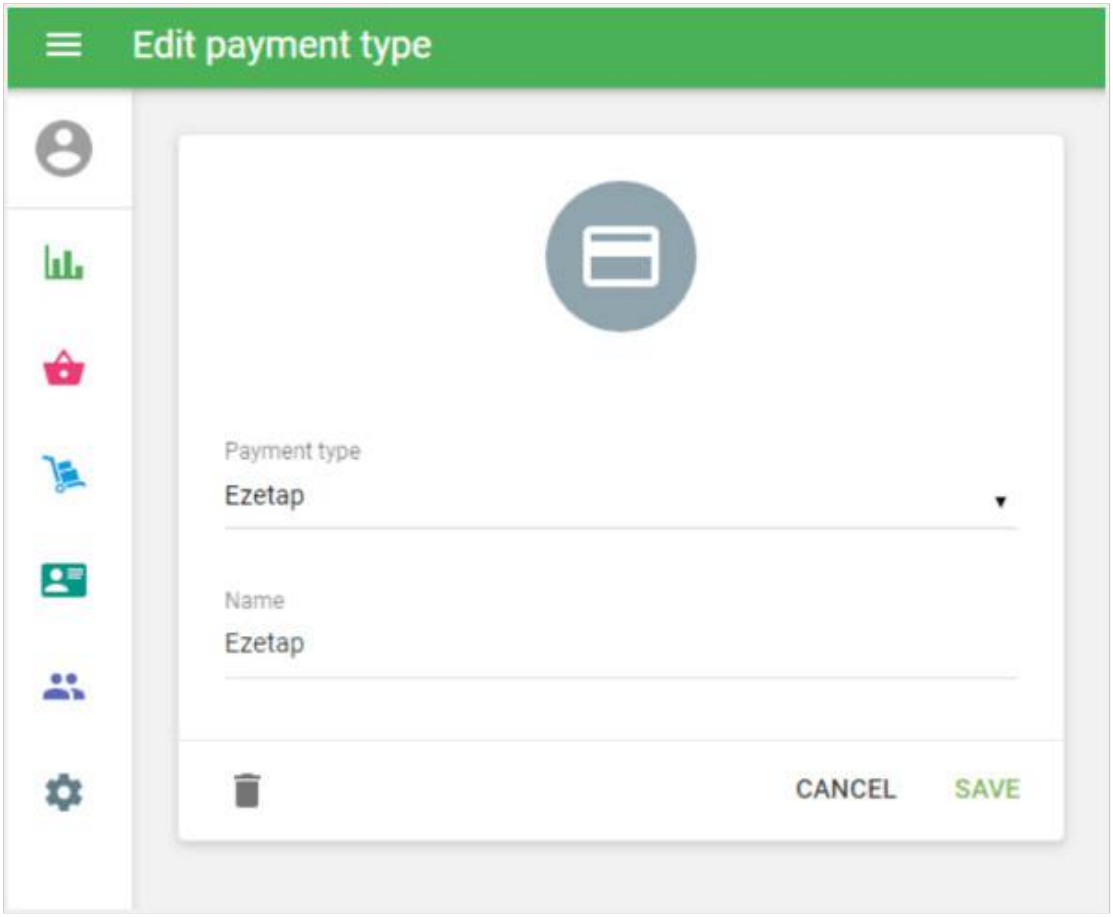
Before connecting a terminal, you need to create an account in Ezetap and receive the device. Integration with Loyverse POS works on the terminal Ezetap D200.

1. Connecting the terminal

Log in to the Back Office, click the ‘Settings’ menu, and then ‘Payment types.' Click the ‘+ Add payment type’ button to add a new type of payment.

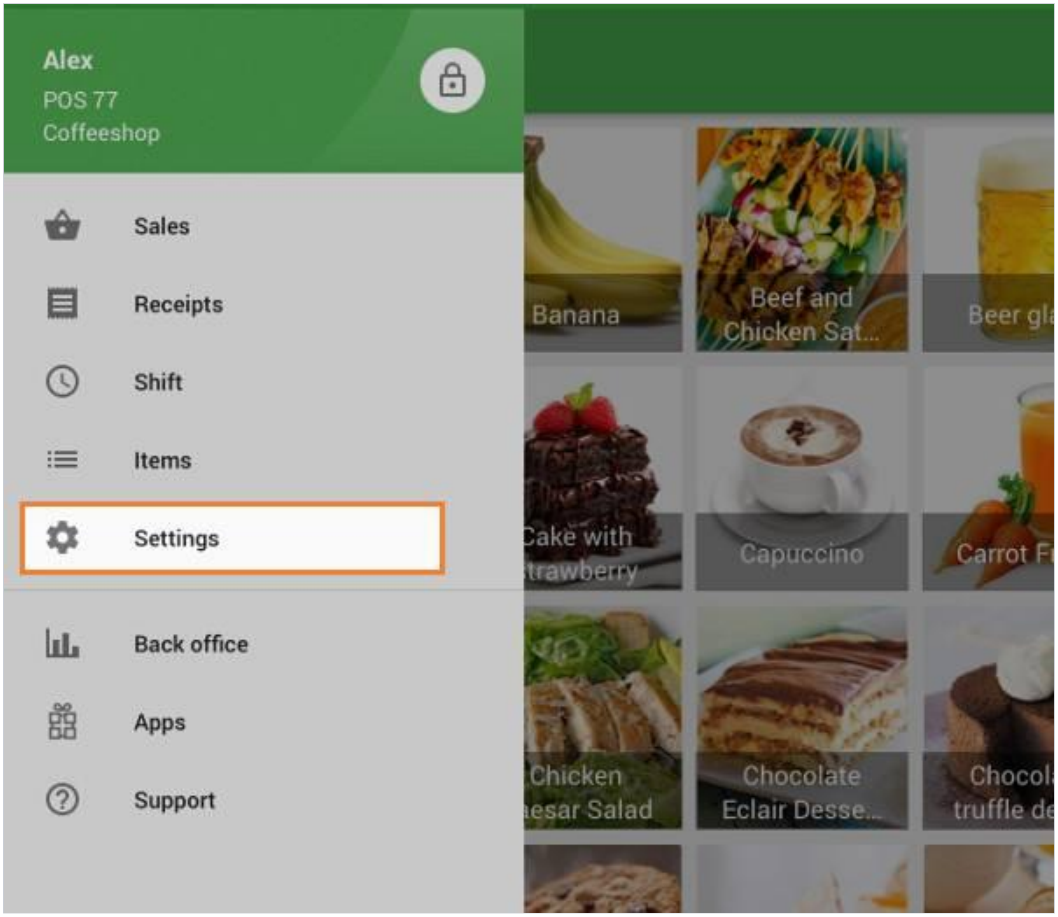


In the ‘Add Payment Type’ window, select the ‘Ezetap’ payment type from the drop-down list. Save your changes when done.

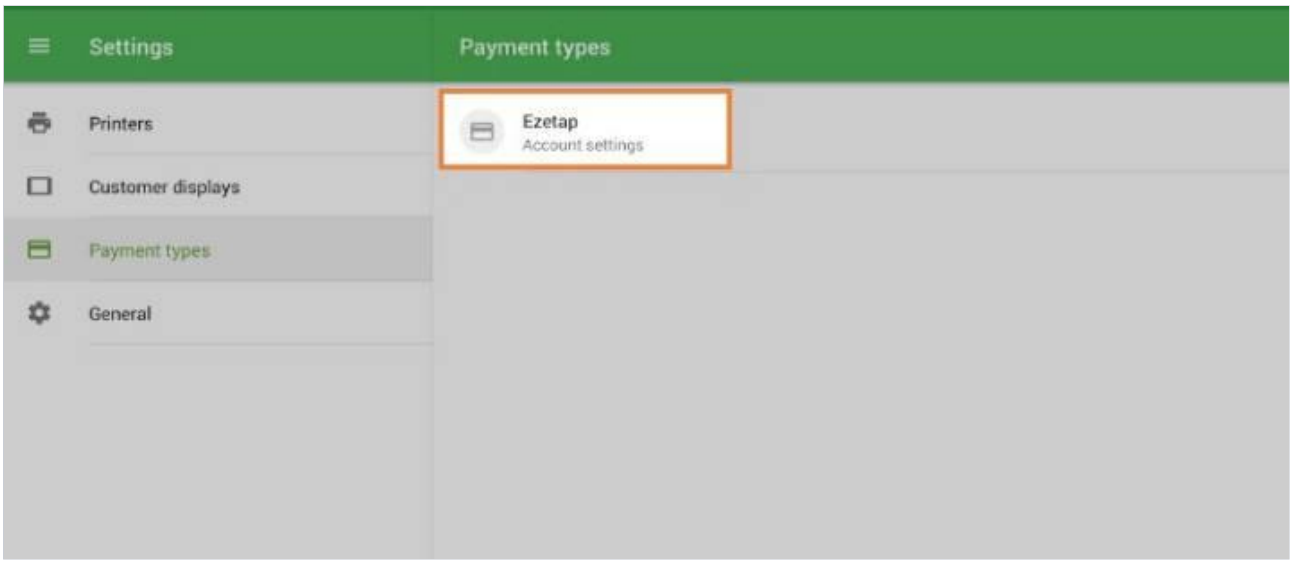


Turn on your Ezetap terminal, connect it to the Internet, and enter the login and password of your merchant account of Ezetap.

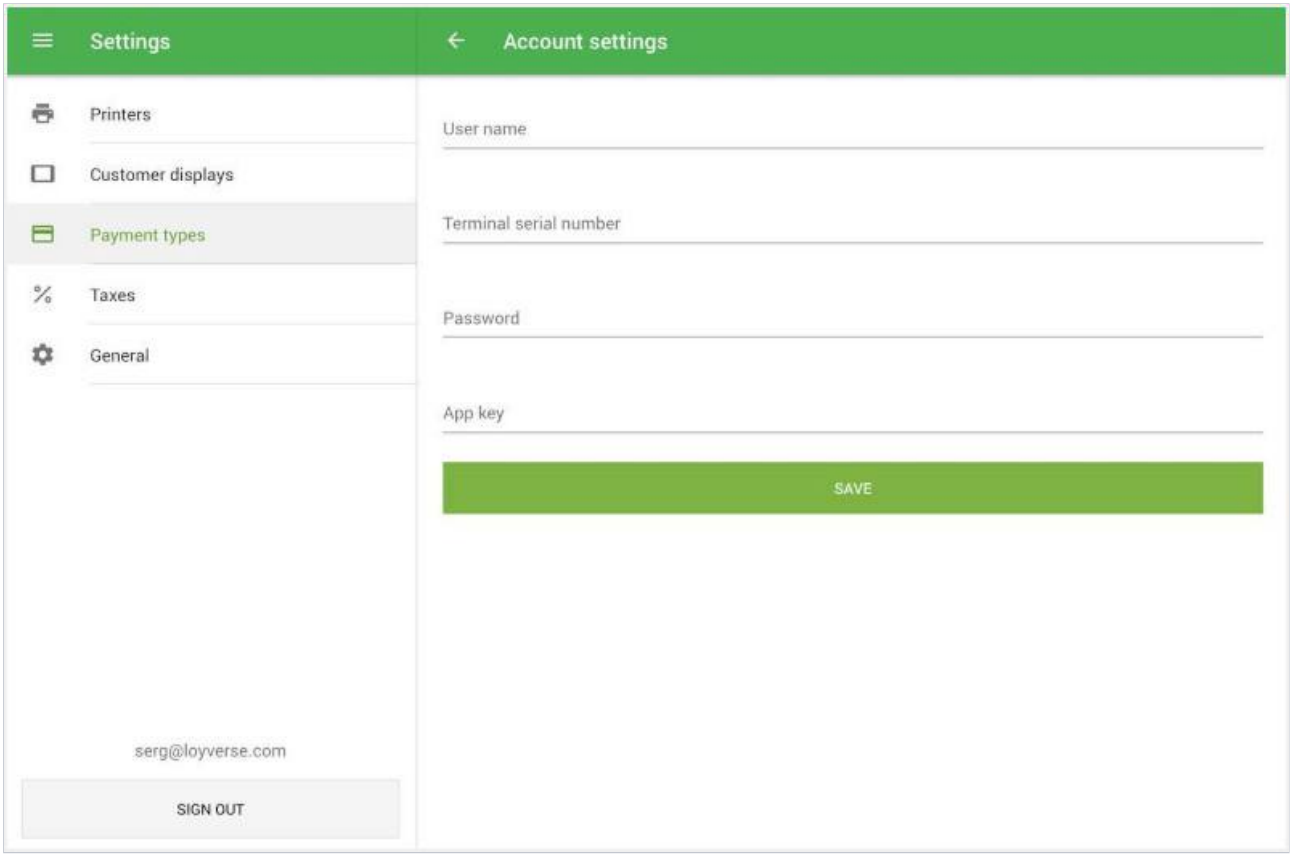
Then launch the Loyverse POS and go to Settings > Payment Types.



Tap the ‘Ezetap’ button for account settings.



Enter your login (user name) of the Ezetap account and your Ezetap terminal serial number, Password, App key, and tap the ‘Save’ button.

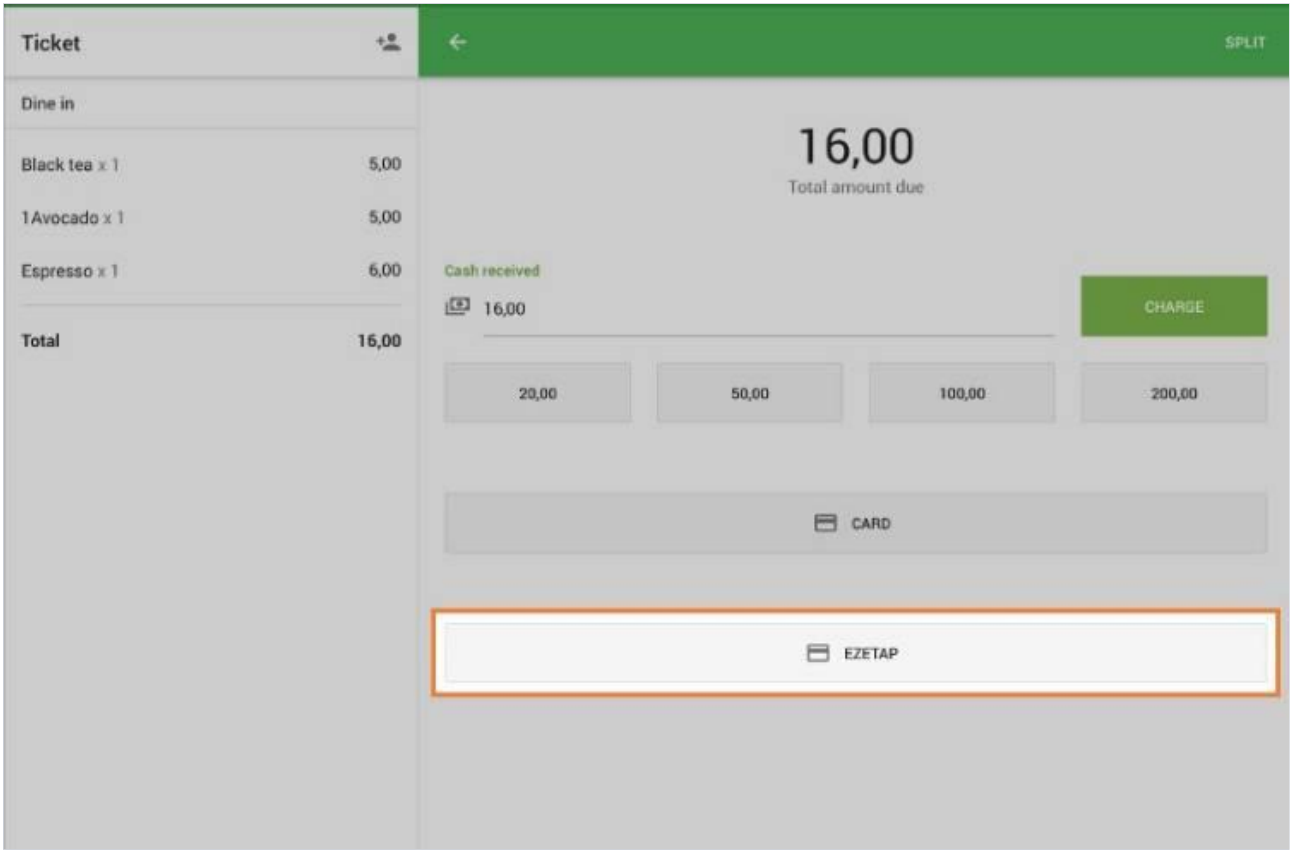


Now you are ready to accept card payments.

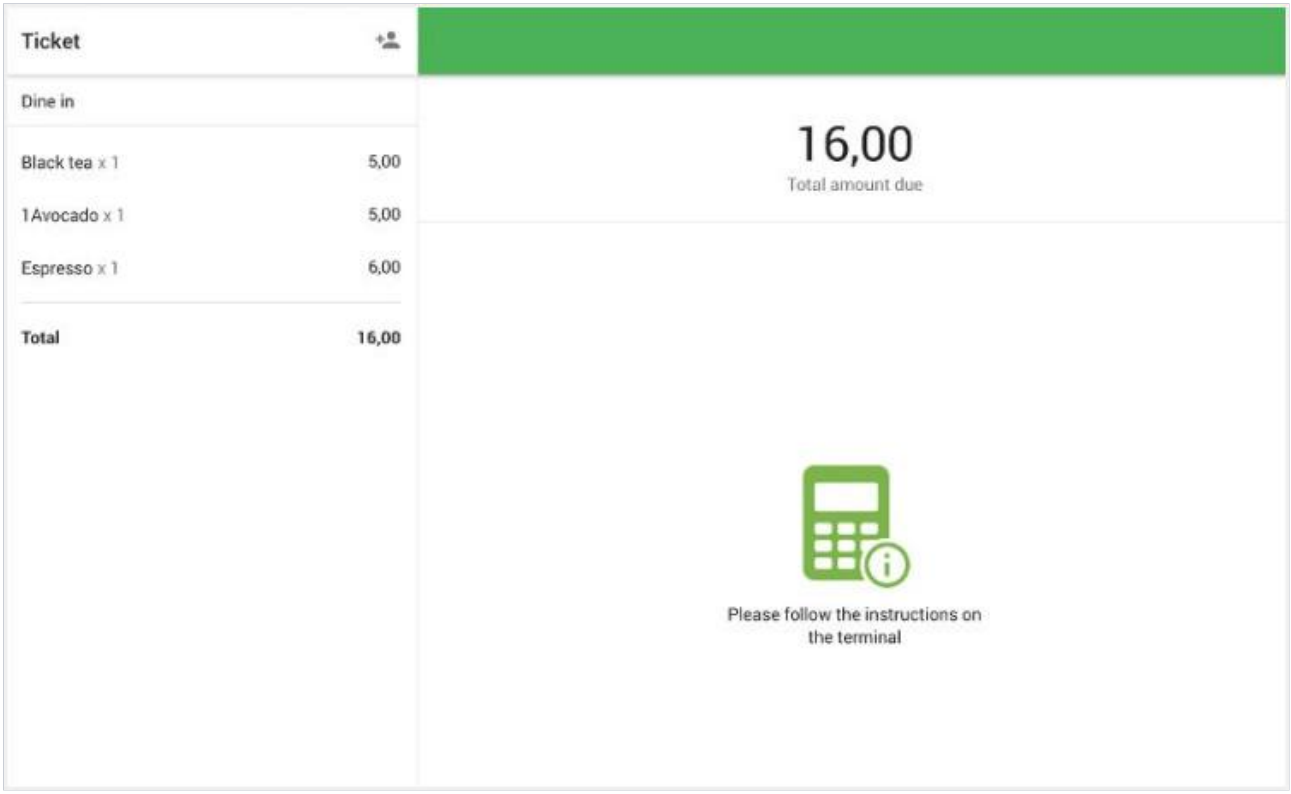
2. Processing Payments

Payment

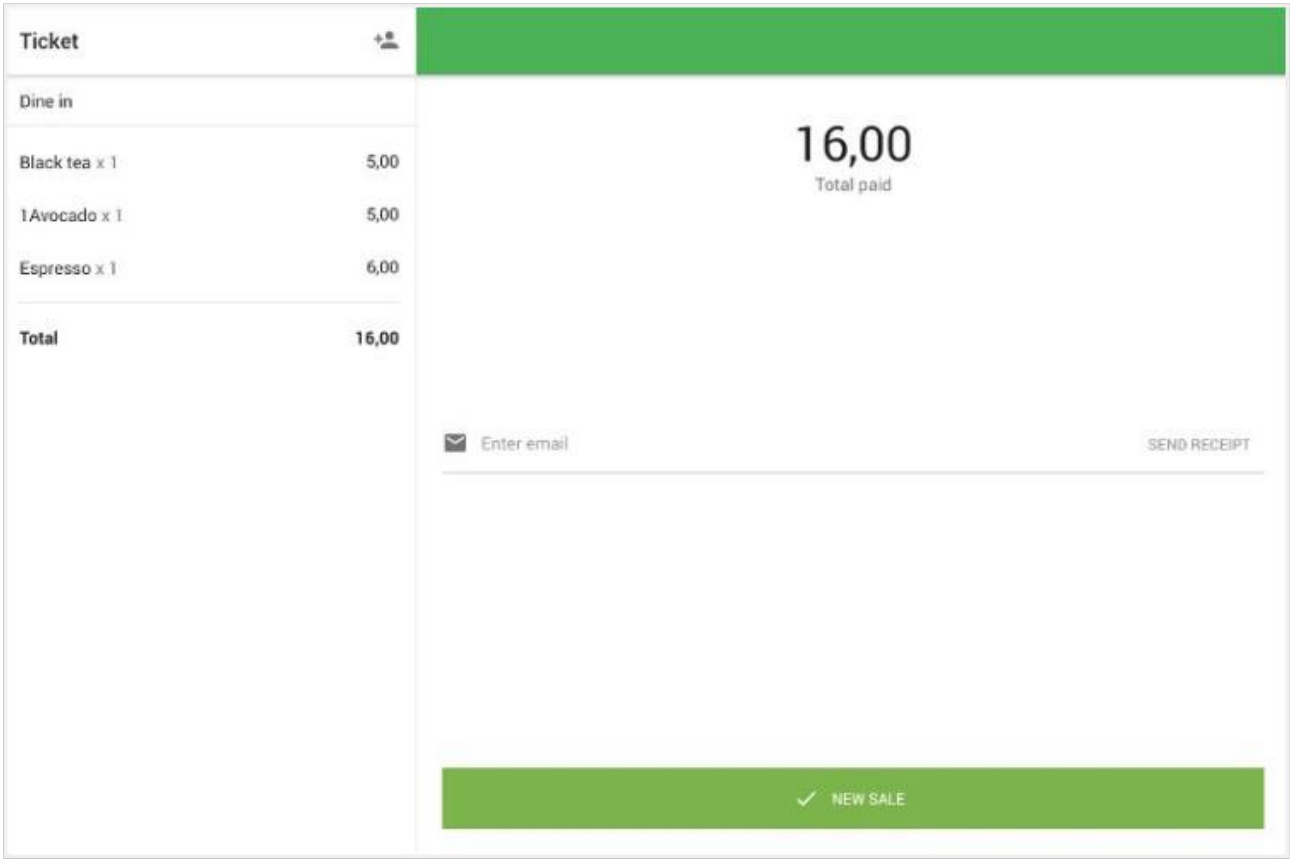
Add items to the ticket and press ‘Charge.’
Tap the ‘Ezetap’ button as the payment type.



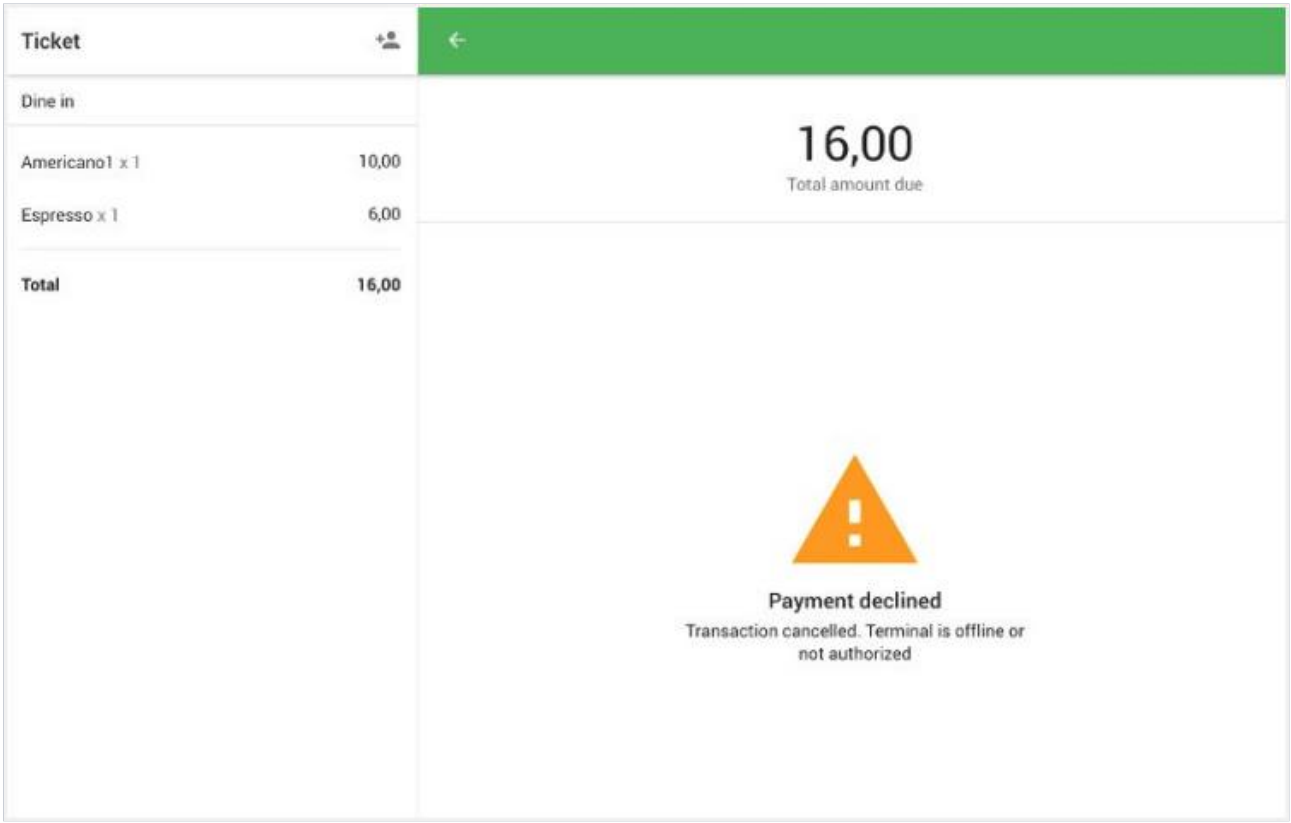
Loyverse POS will wait for a response from the terminal, and you will see an invitation to insert/ swipe the card on the terminal.



If the transaction is successful, Loyverse POS will display the total paid amount on the screen, where you may then print the receipt, send the receipt to your email, or go to the new sale.



In case of an error in the transaction, Loyverse POS will display an error message and print the canceled transaction receipt.

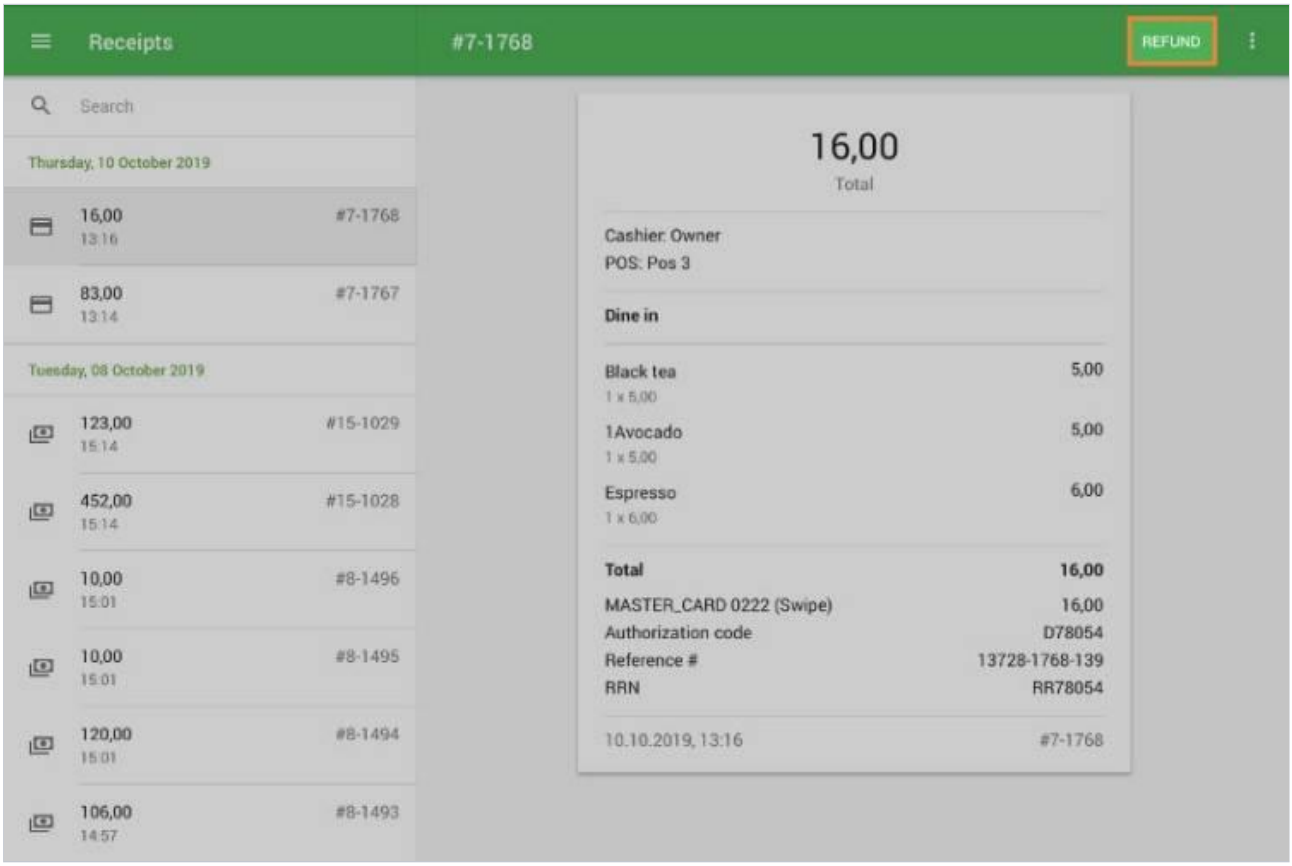


You can return to the ‘select payment type’ screen. You can ask the customer to choose a different type of payment (for example, ‘Cash’) or try another card.

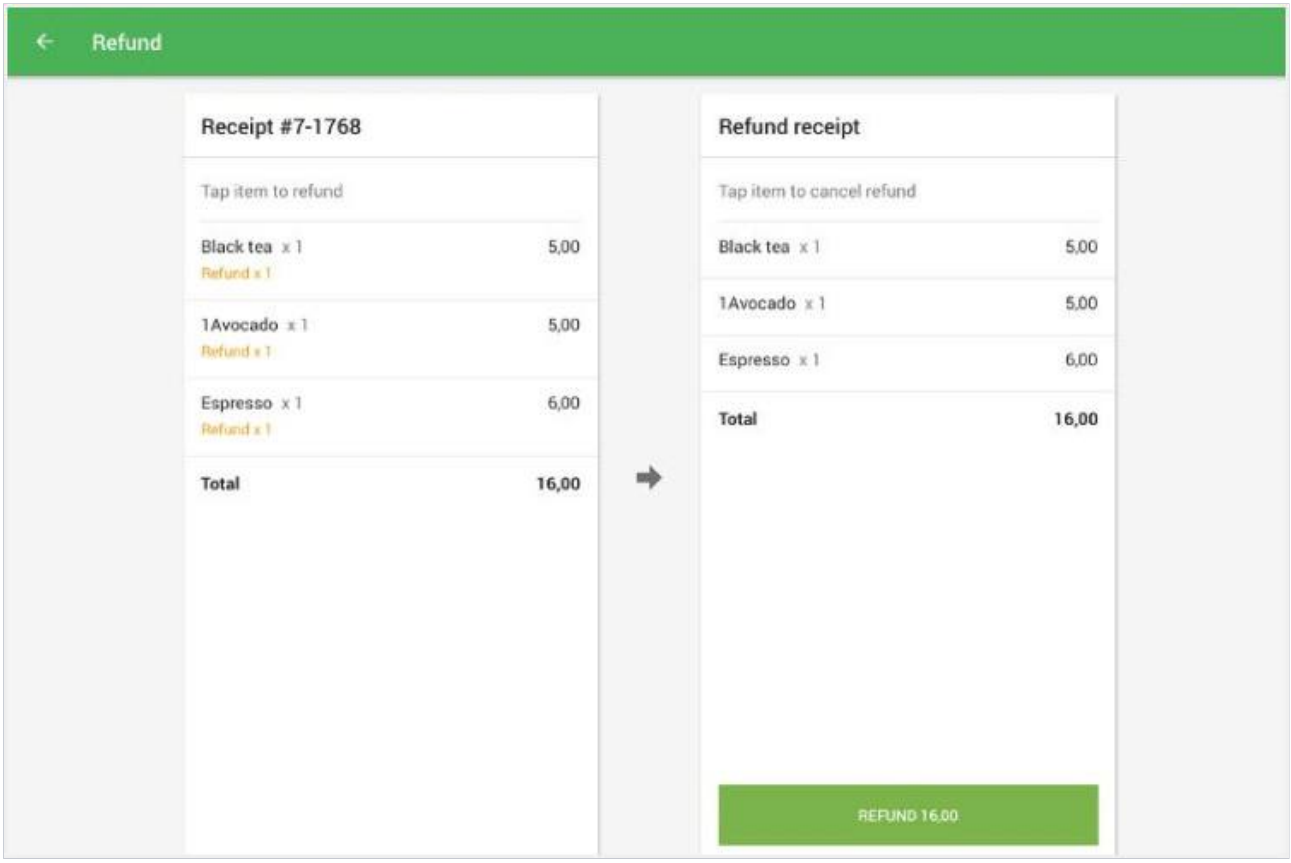
3. Refund

The refund action in the Loyverse POS will not actually transfer funds to the customer’s account but will mark the receipt as refunded for reporting purposes. To transfer funds, perform a refund in the back office of the Ezetap.

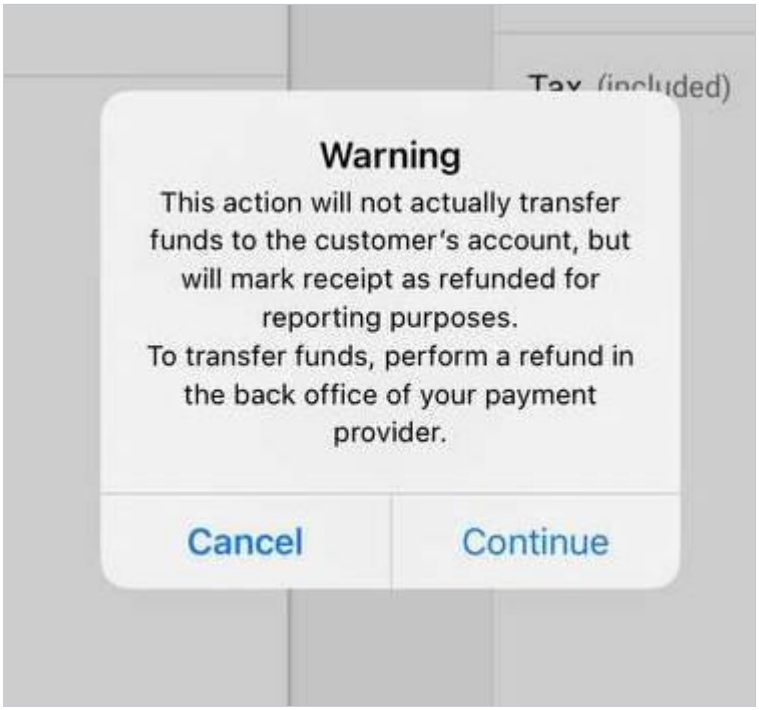
In the Loyverse POS, go to the ‘Receipts’ menu, and tap on the desired receipt.
Then tap ‘Refund.’



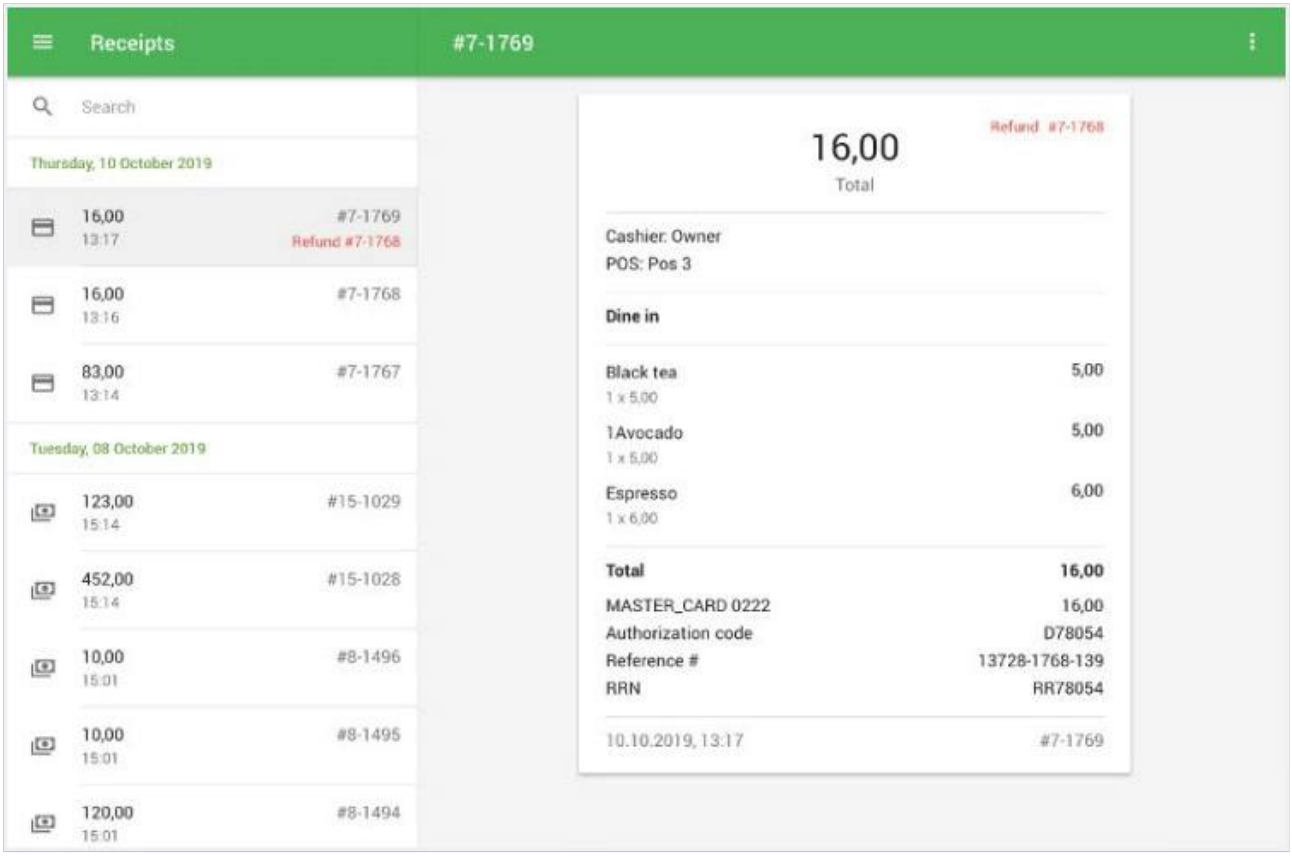
Select all items on the receipt that were paid via card (on the left side) to move them to the ‘Refund receipt’ list (on the right side), and tap the ‘Refund’ button.



You will see the warning message; tap the ‘Continue’ button.



You will see a refunded receipt on the list.



4. Reports

You can view the total number of transactions performed with Ezetap. In the Back Office, select the ‘Sales by payment type’ report.

