

Expire and Grace period

Auto expire function

When auto expire function is activated, everyday after first user login system will :-

1. set all expired items not available for redemption;
2. generate an expired invoice to record this transaction;
3. capture treatment value of expired items as expired value which may form part of the company's turnover.

If company have grace period policy, system will use expiry date plus grace period for action.

Activate auto expire function at Booking > Setup > Member purchased items according to expiry date auto expire

Booking setup	
Booking table time	09:00 am to 10:00 pm
Display time zone	<input checked="" type="radio"/> 1 time zone <input type="radio"/> 4 time zone
Time format	<input type="radio"/> 24 hours format <input checked="" type="radio"/> AM/PM format
Therapist table and room table time for each slot	15 minutes (Not allow to increase)
Equipment table time for each slot	15 minutes (Not allow to increase)
Only accept appointment after preparing roster	<input type="checkbox"/> Yes
Only accept bookings of member of the same shop (Join shop)	<input type="checkbox"/> Yes
Member purchased items according to expiry date auto expire	<input checked="" type="checkbox"/> Yes

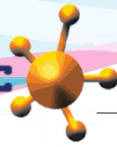
Setup grace period at Master > General Settings > Master Setup > Default grace period

Default grace period	<p>60 Day</p> <p>When new invoice, system will use this as item grace period.</p> <p>Press following to change default item grace period</p> <p>[+30] [+10] [+5] [+2] [+1] [90] [60] [30] [Nil] [-1] [-2] [-5] [-10] [-30]</p> <p>[Day] [Month] [Year]</p>
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At view invoice, item grace period will be displayed. Expired item will also have indicator.

POS > Invoice search > Select invoice > View

Invoice no :	CWB-SI013921	Date :	8-Mar-2015				
Ref Inv No :	Nil	Prepared by :	Administrator (admin)				
Staff :	Chau (chau)	Created at :	3-Mar-2016 13:15				
Club :	CWB	Last updated at :	7-Mar-2016 14:22 / Administrator (admin)				
Code	Name	Quantity	Unit Price	Gross amount	Discount	Total amount	Value
T318	treatment 0318 Expiry date : 7-Mar-2016 (+60d) Nil Item remark : Nil	5	\$ 500.0	\$ 2,500.0		\$ 2,500.0	\$ 2,500.0
T01A	T01A Expiry date : 8-Dec-2016 (Expired) code : Nil Item remark : Nil	5	\$ 800.0	\$ 4,000.0		\$ 4,000.0	\$ 4,000.0
Member :	Ng Macy (00003)	Subtotal :					\$ 6,500.0
		Total amount :					\$ 6,500.0



Manual expire function

User can also use manual method to set items expired. Function at Point of Sale > Expire > Expire

**** Item expiry action ****

Shop	All	Fill in criteria to filter items and carry out manual expire function.
Member group	All Delete Group Buying New Trial	
Member code	From <input type="text"/> to <input type="text"/> or wem-00001	
Invoice date	From -- / -- / <input type="text"/> to -- / -- / <input type="text"/> Quick select	
Invoice no	From <input type="text"/> to <input type="text"/> or <input type="text"/>	
Division	All	
Item nature	All	
Item code	From <input type="text"/> to <input type="text"/> or <input type="text"/>	
Expiry date	From -- / -- / <input type="text"/> to 1 / Mar / 2016 Quick select	

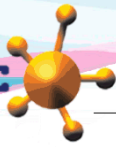
3 record count

Expire list										
Shop	Member group	Invoice date	Invoice no	Item nature	Expiry date	Division	<input type="button" value="Select All"/>			
Member code	Member name	Item code	Item name			Total quantity	Remaining quantity	Total amount	Remaining amount	
Shop 1	New	2-Aug-2015	PSI-00015	Deposit	1-Mar-2016	Unspecified				<input type="checkbox"/> <input type="button" value="Expire"/>
WeM-00001	Chan	D01	D01				5,000.00	4,800.00	\$ 1,000.00	\$ 960.00
Shop 1	New	13-Jan-2016	PSI-00008	Treatment	1-Mar-2016	Unspecified				<input type="checkbox"/> <input type="button" value="Expire"/>
WeM-00001	Chan	T01	Treatment A				1	1	\$ 900.00	\$ 900.00
Shop 1	New	13-Jan-2016	PSI-00008	Treatment	1-Mar-2016	Unspecified				<input type="checkbox"/> <input type="button" value="Expire"/>
WeM-00001	Chan	T01	Treatment A				1	1	\$ 900.00	\$ 900.00
Grand Total :									2,800.00	2,760.00

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At selected item line press <Expire> or select more items and then press <Expire> to carry out expire function.

Press <Expire all> to expire all items on list.



Expired items search and undo expire

All expired items can be searched at Point of Sale > Expire > Search

Undo action can be done if required

Expired item search	
Shop	Shop 1 ▾
Expired invoice no	From <input type="text"/> to <input type="text"/>
Expired invoice date	From -- ▾ / -- ▾ / <input type="text"/> to -- ▾ / -- ▾ / <input type="text"/> or Quick select ▾
Original invoice no	From <input type="text"/> to <input type="text"/>
Original invoice expiry date	From -- ▾ / -- ▾ / <input type="text"/> to -- ▾ / -- ▾ / <input type="text"/> or Quick select ▾
Member	<input type="text"/>
Item	<input type="text"/>

Submit Reset

8 record count

Expired item search result								
Shop	Expired invoice no	Expired invoice date	Original invoice no	Original expiry date	Member	Item	Expired value	Action
Shop 1	PEX-00012	2-Mar-2016	PSI-00018	1-Mar-2016	Ho Tina (WeM-00003)	T02	\$ 3,400.00	<input type="checkbox"/>
Shop 1	PEX-00011	2-Mar-2016	PSI-00017	1-Mar-2016	Lam Cherry (WeM-00002)	D01	\$ 12,000.00	<input type="checkbox"/>
Shop 1	PEX-00010	2-Mar-2016	PSI-00015	1-Mar-2016	Chan (WeM-00001)	D01	\$ 960.00	<input type="checkbox"/>
Shop 1	PEX-00009	2-Mar-2016	PSI-00010	1-Mar-2016	Chan (WeM-00001)	T01	\$ 2,700.00	<input type="checkbox"/>
Shop 1	PEX-00008	2-Mar-2016	PSI-00008	1-Mar-2016	Chan (WeM-00001)	T01	\$ 900.00	<input type="checkbox"/>
Shop 1	PEX-00007	2-Mar-2016	PSI-00008	1-Mar-2016	Chan (WeM-00001)	T01	\$ 900.00	<input type="checkbox"/>
Shop 1	PEX-00006	2-Mar-2016	PSI-00008	1-Mar-2016	Chan (WeM-00001)	BU01	\$ 3,000.00	<input type="checkbox"/>
Shop 1	PEX-00005	2-Mar-2016	PSI-00008	1-Mar-2016	Chan (WeM-00001)	BU01	\$ 5,000.00	<input type="checkbox"/>
Total expired value							\$ 28,860.00	

Item expired value and Total expired value

At selected item line press <Undo> or select more items and then press <Undo> to carry out undo expire action.