CES Touch

CES Touch User Guide

Version 1.0 (8.1.0 r2b31)

Contents

About This Manual

This Manual tells you how to use CES Touch. It gives you information on how to set up and maintain your system and some general good practice advice. Any information you cannot find in this manual is covered in the Advanced User Manual, please speak to your Dealer.

This manual assumes that the target audience is familiar with PC s and their general use.

To make the manual user friendly; icons that you will see on your screen have been used e.g.

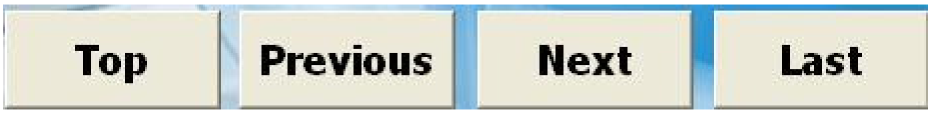
	Keep an eye out for boxes like this as they contain tips and helpful hints!

Mix and Match is not included in this version as it is currently being rewritten

Handhelds, Location Stock, Accounts, Bookings and Scales will be included in the next release

Back Office

General Navigation



Top - takes you to the first record
Previous - takes you to the previous record
Next - takes you to the next record
Last - takes you to the last record

Delete - will delete the current record
Save – saves any changes made to the current record
Abort – exits the current record and does not save any changes

Exit – exits the CES Touch Software

Your Product Database

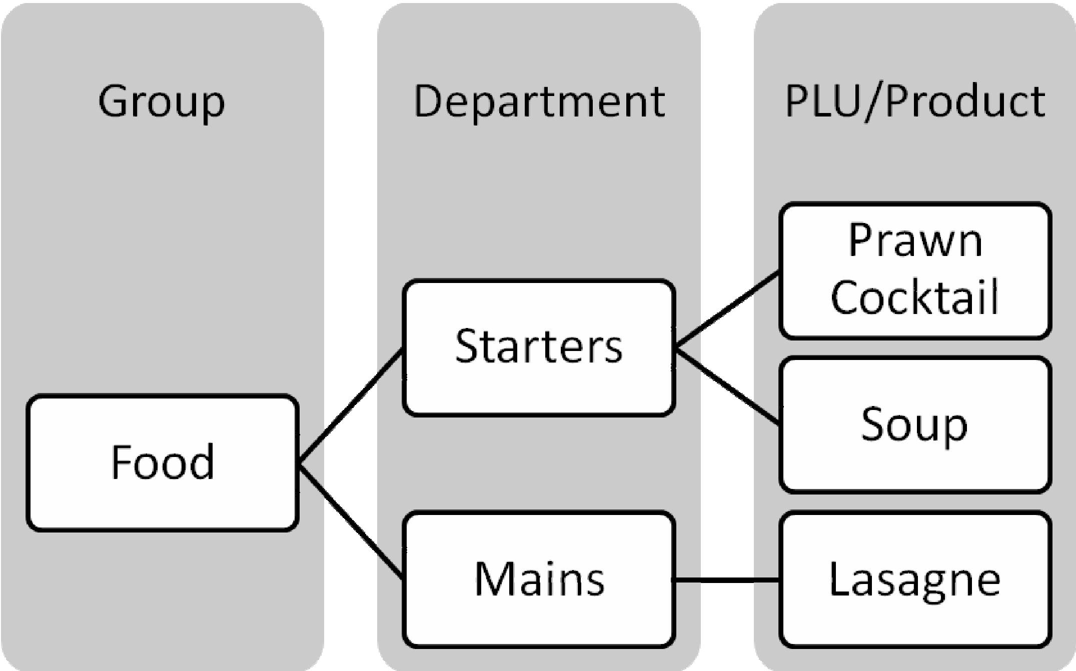
Your Product Database should be regularly maintained with key information such as cost and retail prices. The product database is divided into 3 areas; Groups, Departments and PLUs (products).

A 'Group' is a reportable area *e.g. Food*. A 'Department' is a reportable area within a 'Group' *e.g. Starters*.

To create a PLU you must have the Group and Department in place first e.g. if we wanted to create 'Soup' we would need Food and Starters.

Before you start to set up your system it is a good idea to decide how you would like your reports to look and devise a naming convention for your PLUs *e.g. 01001, 01* may be the Department *e.g. Food and 001* the first product *e.g. Soup* so the product will have a PLU of 01001 and a description of Soup. If being used in the Retail environment with scanner the PLU should be the barcode.

Other mandatory information for the product record is the supplier name; this can be created from the product record.



How to create a new PLU/Product

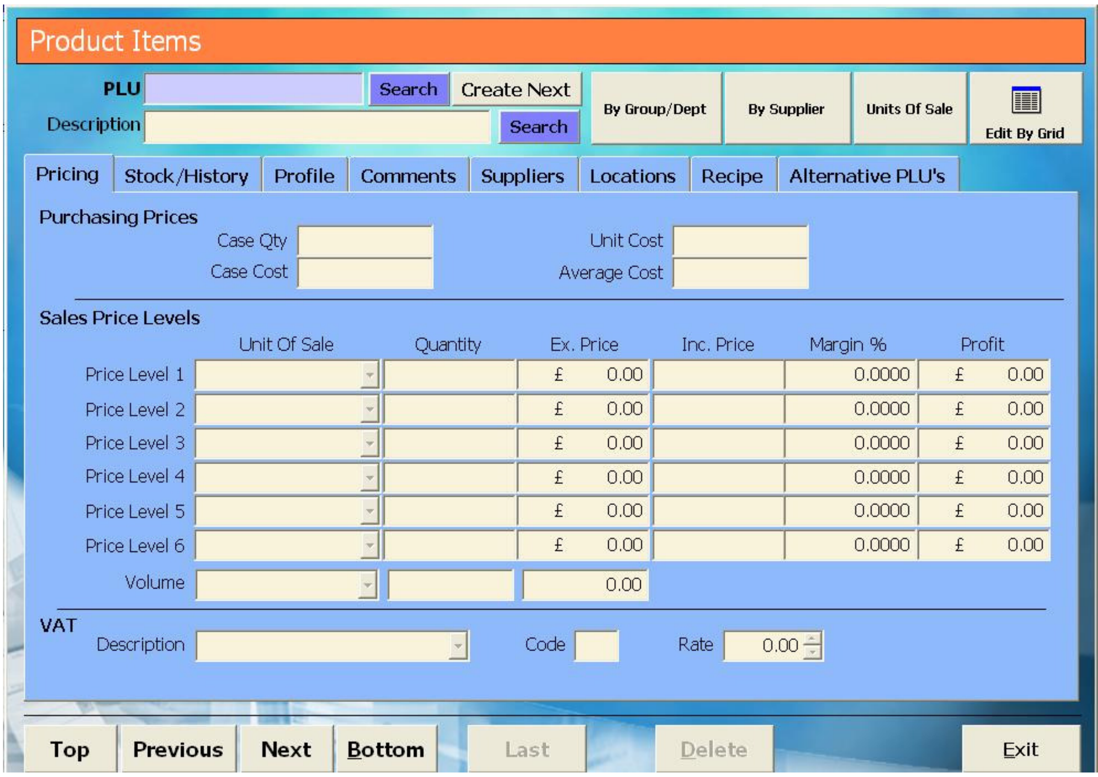
☝	You can also create products on the fly in sales mode – see Functions section

If you are using the stock control module as well please also refer to Stock In/Out section of the manual before saving the item.

- Select

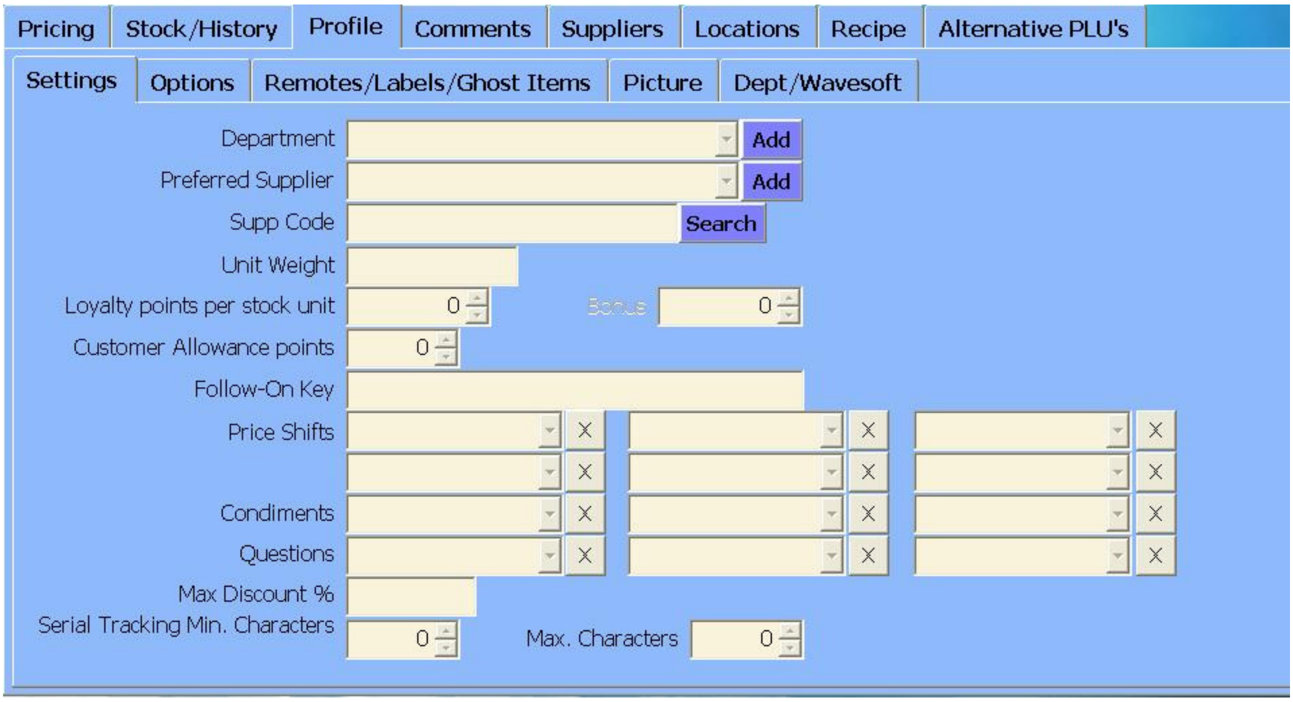
- Select

A blank product record is displayed



- Enter the PLU number (barcode) or if not being used in conjunction with a scanner enter the name of the product – this is limited to 14 characters, defaults to uppercase and is shown on reports

- Press Enter, if you wish to create this product select Yes, if a product with the PLU already exists you will be taken to that record
- Enter the description of the product – this is limited to 30 characters and is shown on reports
- In the price levels section enter the retail price for the relevant sale sizes and price levels
- Select the 'Profile' tab



- From the drop down list select the department the product belongs to
- From the drop down list select the supplier
- Select save

☝	If the Department or Supplier does not exist select 'Add' and you can add them straight in to the database

Editing existing Product

- Select

- Select

- Enter the PLU or description of the product or use the search boxes and press Enter
- The Product record is displayed, from here you can edit information such as prices, reporting department, name

	The PLU field cannot be edited

- Once all changes have been made select Save

	Any changes made will take effect immediately

Deleting a Product

- Select

- Select

- Enter the PLU (or use the PLU and description search boxes) of the product to be deleted and press Enter
- Select

- The system will ask if you are sure Select Yes/No

	The deleted product can still be reported on historically

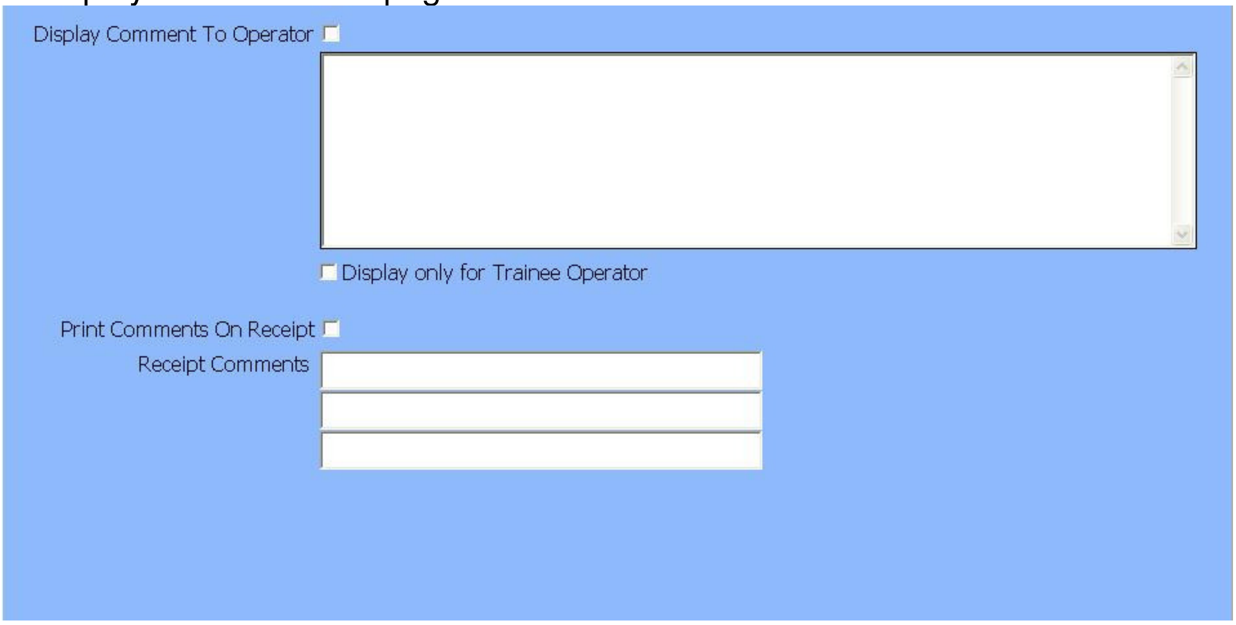
	If the PLU has more than one barcode use 'Alternative PLU's' tab to add the extra ones in – each barcode can have its own price

Add a comment

Comments are displayed on the terminal and/or customer receipts and are product specific

- Select

This will display the comments page



If the comment is to be displayed to the Operator only

- Tick the display comment to operator box
- Type text into the text box below

If the text is only for a Trainee Operator

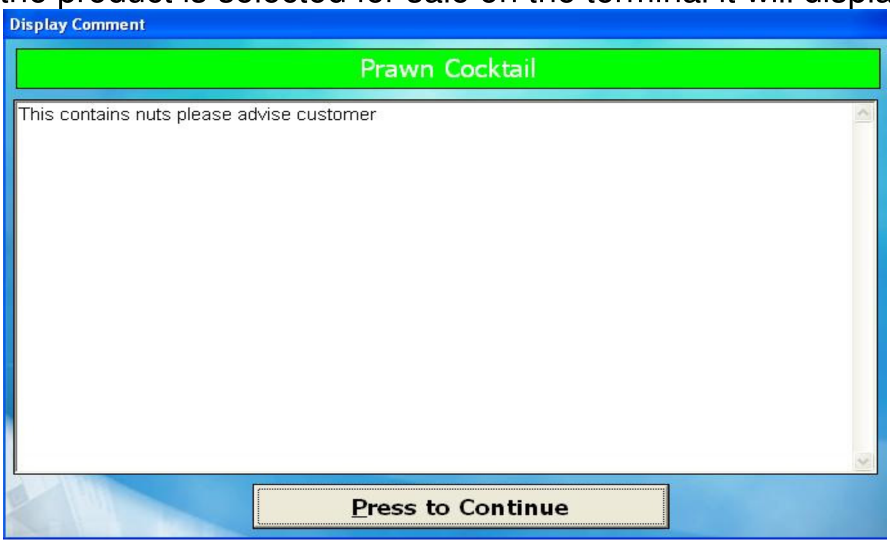
- Tick the display only for trainee operator box

If the comment is to print on a receipt

- Tick the print comments on receipt box

If the text is different type the text into the receipt comments lines

Once the product is selected for sale on the terminal it will display this screen



Enable Compulsory Receipts for a Product

- Select

- Tick

Every time this product is sold it will produce a receipt

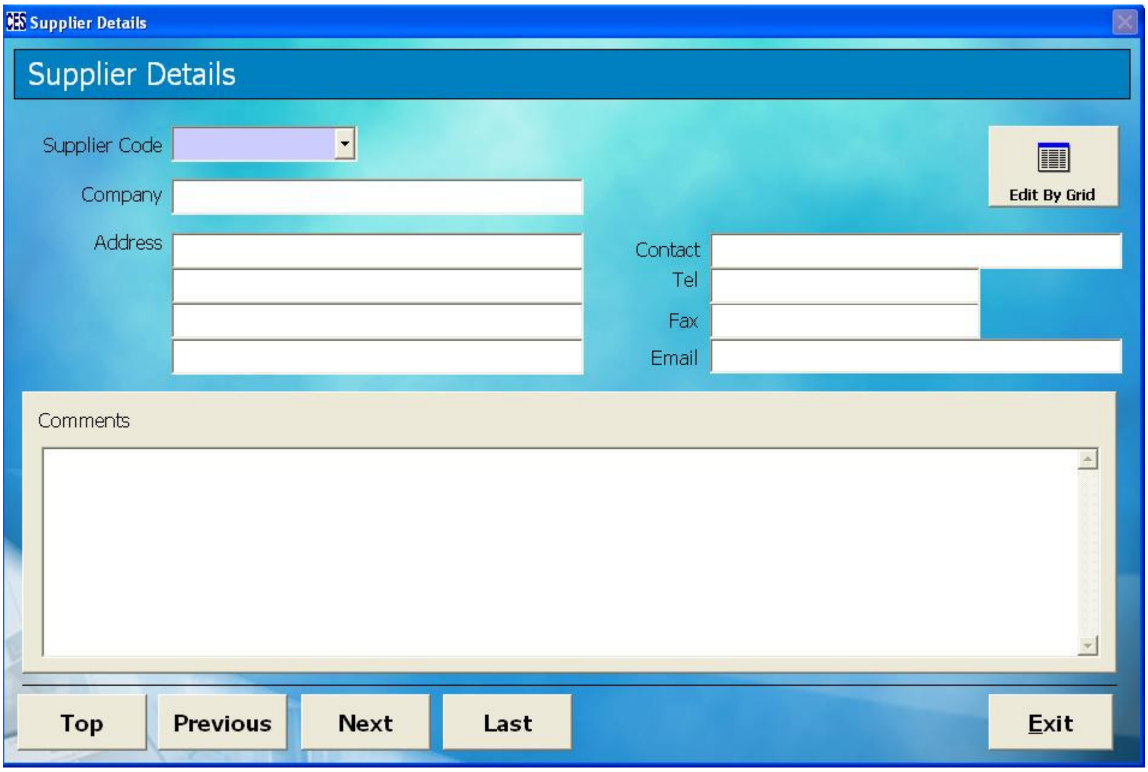
Suppliers

Creating new Supplier

- Select

- Select

A blank Supplier record is displayed



- In the supplier code field enter in the unique supplier code – this can simply be 001 if your suppliers do not use codes
- Press Enter, if you wish to create this Supplier select Yes, if a Supplier with the code already exists you will be taken to that record
- Enter the company name in the company field

	This is the only mandatory information; you can however fill in the other fields,

	this information will be shown in the supplier list report.

Editing an existing Supplier

- Select

- Select

- From the drop down box select the supplier to be edited or type in the supplier code and press enter
- Edit the information as required
- Select Save

Deleting a Supplier

- Select

- Select

- From the drop down box select the supplier to be edited or type in the supplier code and press enter
- Select delete
- If you are sure you want to delete this supplier select Yes, if not select No

Condiments

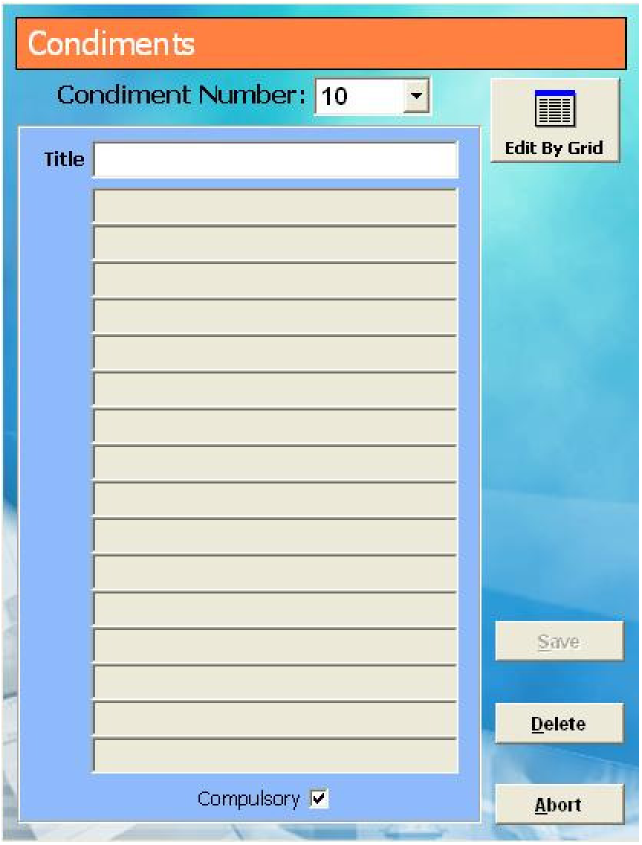
Condiments are extra instructions that can be added to the profile of a product e.g. cooking instructions for a steak or size of shoe sold.

Creating a new Condiment

- Select

- Select

A blank Condiments record is displayed



- Enter the unique condiment number (you can see the last one used by looking in the drop down list)
- Press Enter, if you wish to create this Condiment select Yes, if a Condiment with the code already exists you will be taken to that record
- Enter the title of the condiment *e.g. Cooking Instructions or Shoe Colour*

- Press Enter
- In the first field type the first selection you would like to see in your list
- If this is not a compulsory selection remove the tick from the ‘Compulsory’ box
- Once all the options have been entered select Save, if you do not wish to Save this select Abort

	The options will be displayed on the till in the order they are entered in this list

Editing a Condiment

- Select

- Select

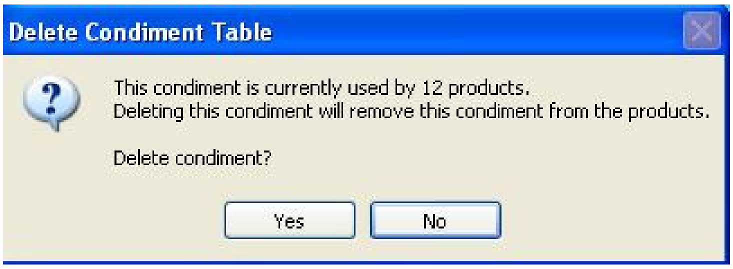
- From the drop down box select the Condiment to be edited or type in the condiment number and press enter
- Edit the information as required
- Select Save

Deleting a Condiment

- Select

- Select

- From the drop down box select the Condiment to be edited or type in the condiment number and press enter
- Select Delete, if the Condiment is attached to 1 or more products you will see the following message:

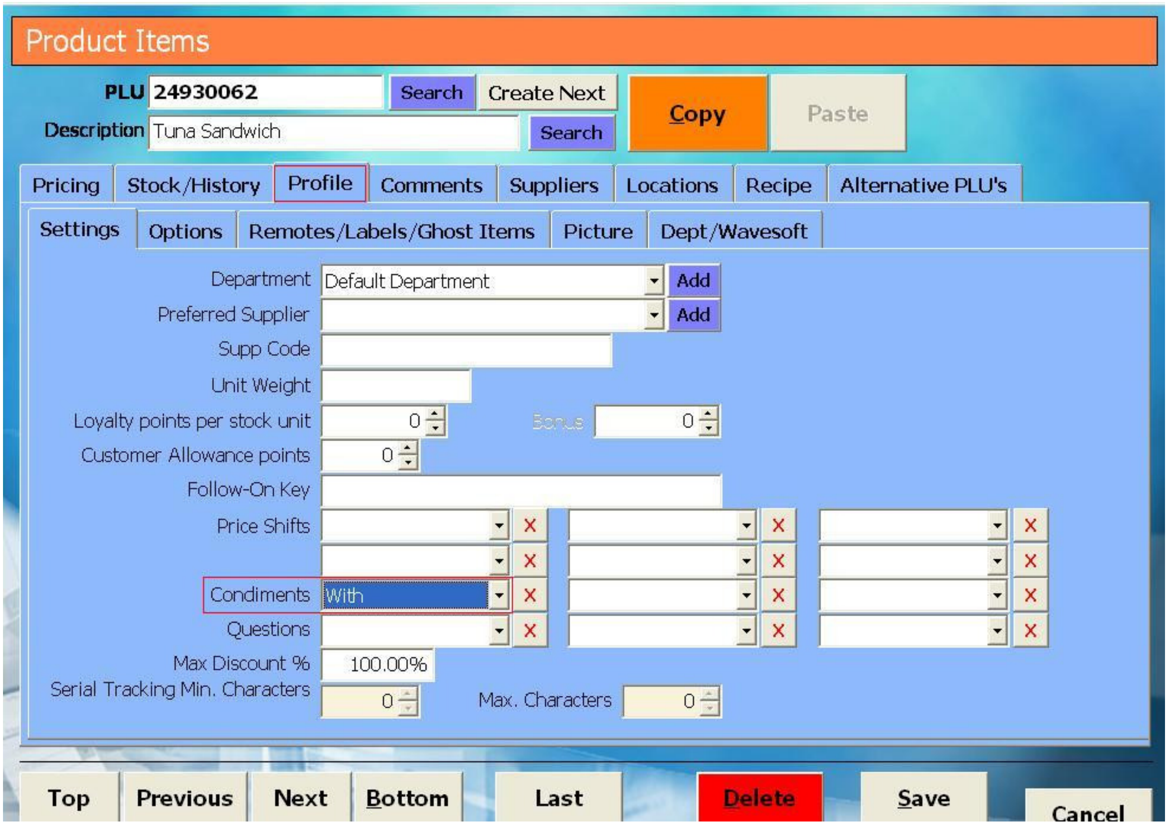


- If you are sure you want to delete it select Yes if not select No

Attaching a Condiment to a Product

- Select Products

- Find the product you wish to attach the Condiment to
- Select the 'Profile' tab
- In Condiments use the drop down selections to chose the options you wish to attach



- Select Save

Removing a Condiment from a Product

- Select Products

- Find the product you wish to remove the Condiment from
- Select the ‘Profile’ tab
- In Condiments Select the  next to the option you want to remove
- Select Save

☝	You can have a maximum of 3 condiments attached to a product and each condiment can have a maximum of 16 options

☝	These print on remote printer tickets only.

Menus

Menus are buttons on the tills that display predefined products *e.g. all pasta dishes or all type of shoe.*

How to create a new Menu

- Select

- Select

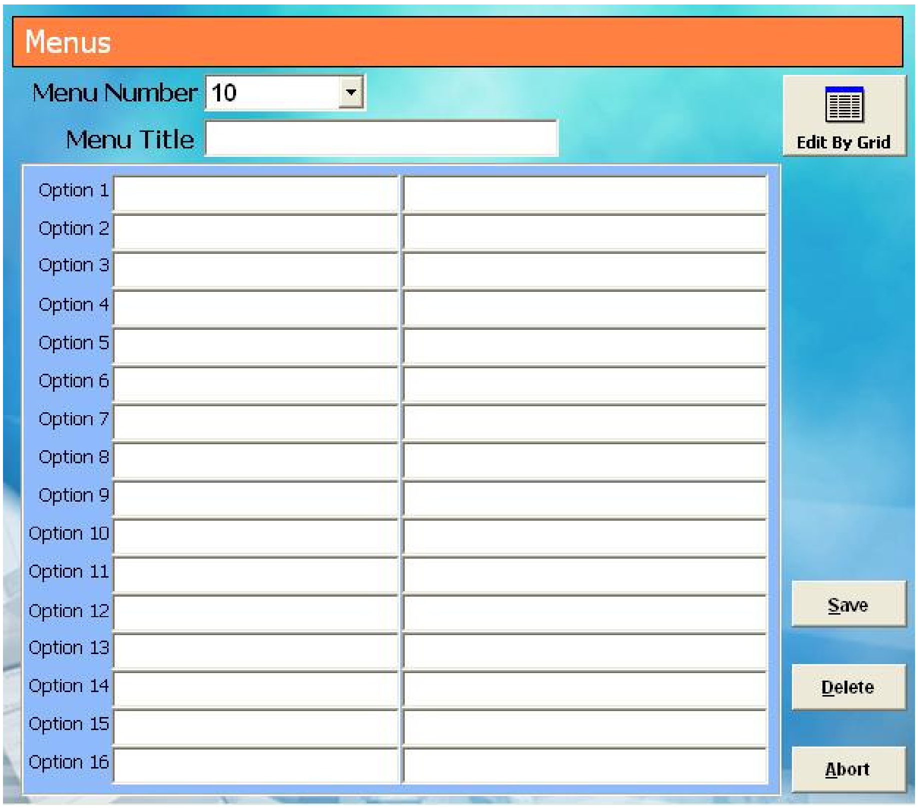
- Enter the unique menu number (you can see the last one used by looking in the drop down list)
- Press Enter, if you wish to create this Menu select Yes, if a Menu with the number already exists you will be taken to that record
- Enter the title of the Menu *e.g. Pasta Dishes or Trainers*
- Press Enter
- With the cursor in the Option 1 field select 'Search Product'
- From the tree view select the 1st product you wish to be displayed in the menu
- Once all the products are listed select Save

To edit an existing Menu

- Select

- Select

A blank menu record will be displayed



- From the drop down box select the Menu to be edited and press enter
- Edit the information as required
- Select Save

☝	You can have a maximum of 16 options attached to a menu

To delete a Menu

- Select

- Select

- From the drop down box select the Menu to be edited and press enter
- Select Delete
- If you are sure you want to delete it select Yes if not select No

Questions

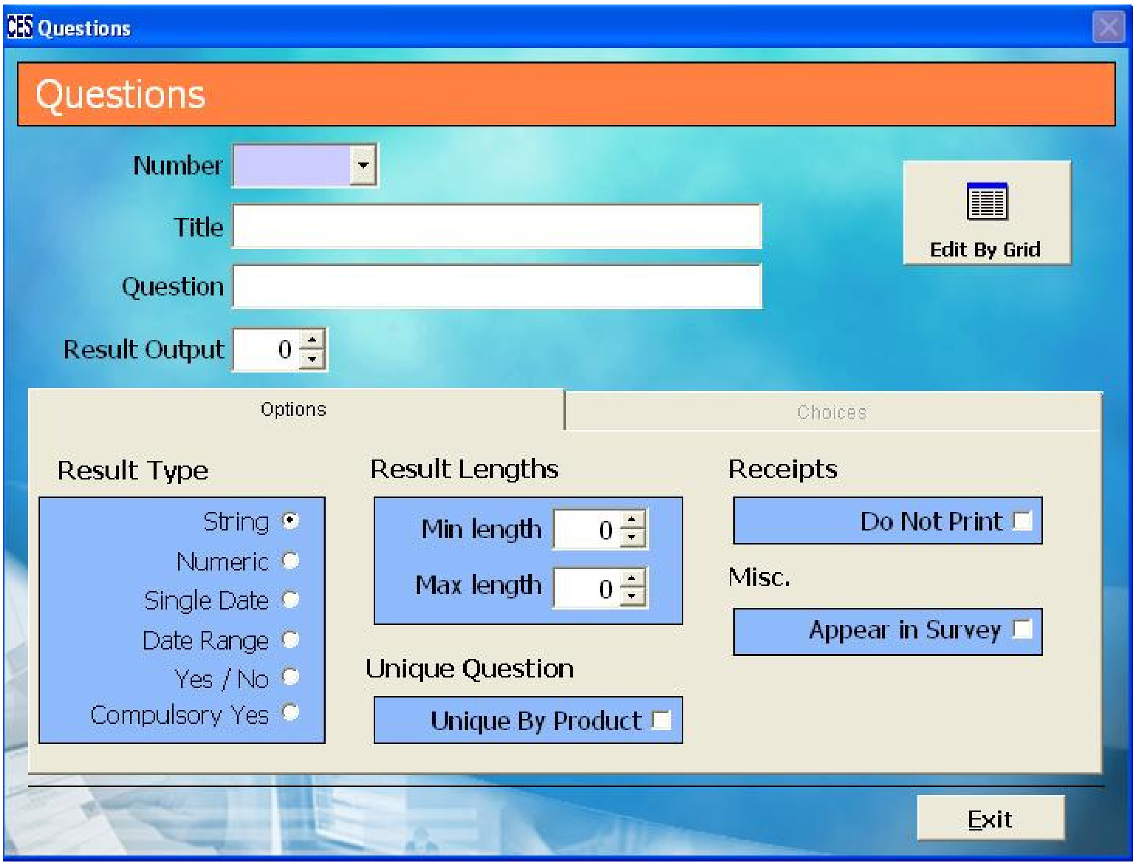
Questions can be used in several ways e.g. in the bar environment they can be used to prompt the user to check for ID when selling alcohol or in the retail environment to up sell; so if they are selling a pair of shoes would the customer like shoe polish?

To create a new Question

- Select

- Select

A blank Questions record will be displayed



- Enter the unique number (you can see the last one used by looking in the drop down list)
- Press Enter, if you wish to create this Question select Yes, if a Question with the number already exists you will be taken to that record
- Enter the title of the Question e.g. Over 18 or Shoe Polish?
- In the Question field type in the question or prompt
- Select the type of result to be entered *e.g. Yes/No or a number*
- In the result lengths select the minimum and maximum answer length
- Unique Question – does it ask once in the transaction or each item that has the question attached
- If this does not need to be printed on the receipt tick the Do Not Print box

Attaching a Question to a product

- Select Products

- Find the product you wish to attach the Question to
- Select the 'Profile' tab
- In Questions use the drop down selections to chose the options you wish to attach

- Select Save

To remove a Question from a Product

- Select Products

- Find the product you wish to remove the Question from
- Select the 'Profile' tab
- In Questions Select the X next to the option you want to remove
- Select Save

☝	You can have a maximum of 3 Questions attached to a product

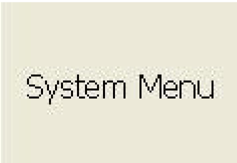
Customer Display (Pole Display)

The customer display allows you to create messages to be shown at different statuses of a terminal

Create a message

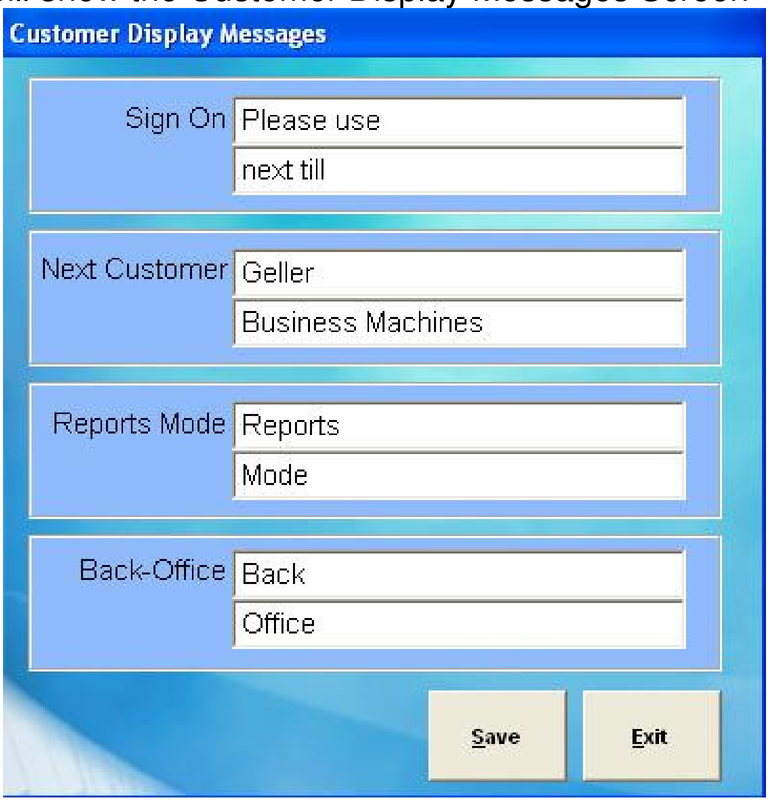
- Select

- Select



- Select

This will show the Customer Display Messages Screen



- Enter the text you want to appear on the Customer Display depending on the status of the terminal

	You can have a maximum of 20 characters on each line

Saving Changes

- Select

If you do not wish to save changes made select

Operators

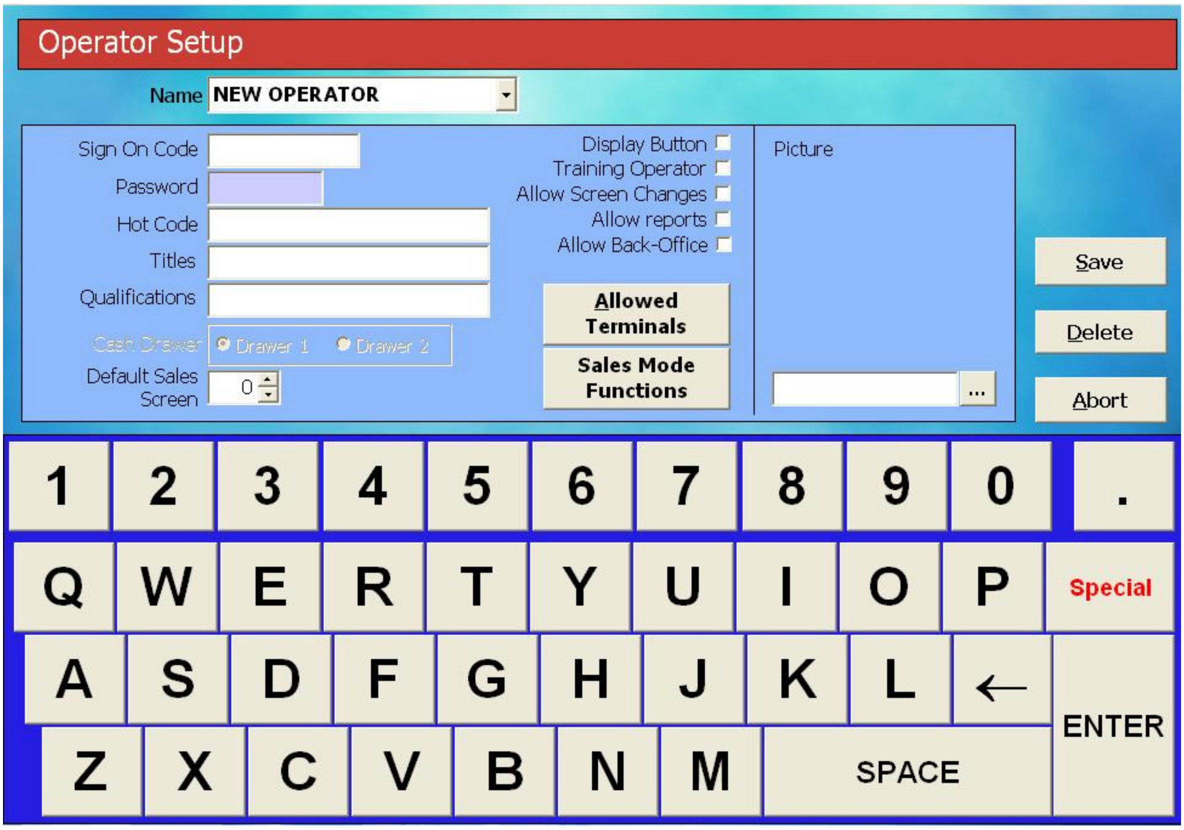
Operators are till users who are or are not given permission to carry out functions on the tills

To create a new Operator

- Select

- Select

A blank Operator record will be displayed



- Enter the Operator name and press Enter, if the name already exists you will be taken to the record, if not you will be asked if you wish to create the new operator
- Tick the ‘Display Button’ option if you want the operator name to appear on the log on screen

- Tick ‘Allow Reports’ if the user will be able to access POS reports
- Tick ‘Allow Back Office’ if the user will be able to access Back Office
- Enter a ‘Sign On Code’ to enable ‘Manual Sign On’

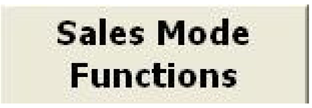
- Enter a ‘Password’ to be used in conjunction with ‘Manual Log On’
- If the operator is being assigned a

☝	Passwords are numerical and can have a maximum of 6 characters

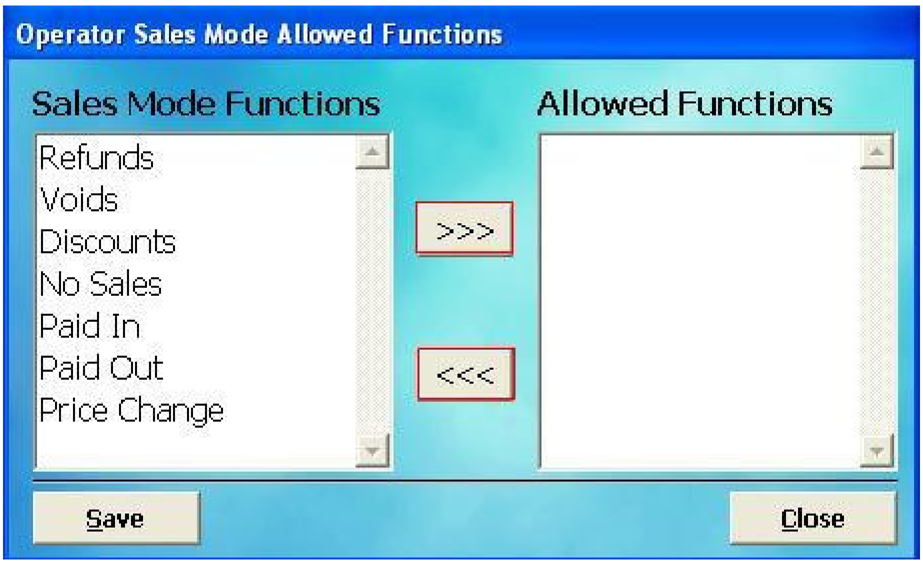
Sales Mode Functions – This is the option that gives operator permissions on the terminal when in Sales Mode

If the Operator is to be allowed to carry out ‘Functions’ on the tills:

- Select



The Allowed Functions screen is displayed



- From the window on the left, select the Function to be allowed

- Select the 

to move the Function in to the Allowed Functions window
- Select Save

You have now successfully set up a new operator

To edit an existing Operator

- Select

- Select

A blank Operator record will be displayed

- From the drop down box select the Operator you wish to edit the details of
- Edit required information
- Select Save

To delete an Operator

- Select

- Select

A blank Operator record will be displayed

- Select the operator to be deleted from the drop down list
- Select delete

The Operator will be deleted from the Operator list

Receipt Set Up

Setting the Header and Footer for Receipts

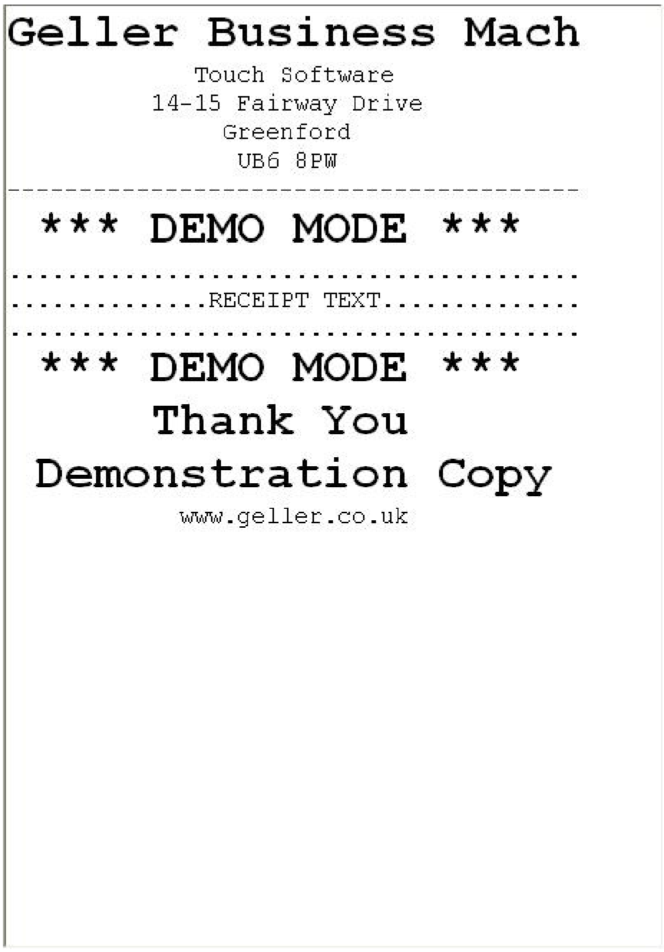
- Select

- Select

This will display the Receipt Set Up screen

- Type the desired text into the relevant fields and select the text size from the drop down boxes on the right

- Selecting Print will print a copy of the text
- Selecting View will display the text on screen as below



- Selecting Save will save the changes made
- Exit will go back to the menu selection screen without saving changes

☝	If you have made changes and they have not saved you may be in DEMO mode

Reason Menus

Reason menus are attached to various till functions by default. When doing a function on the till you are prompted for a reason *e.g. voiding an item the reason may be the order was incorrect*

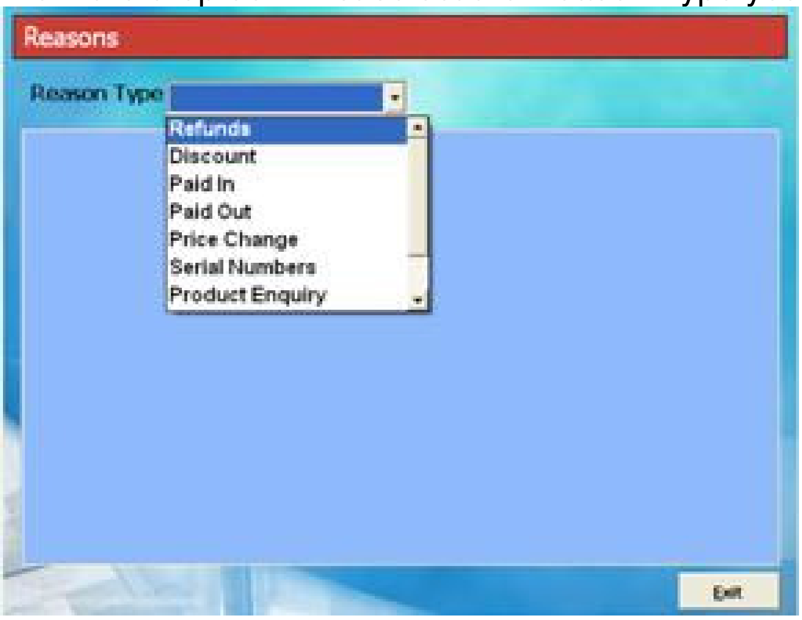
To add a value to a reason type

- Select

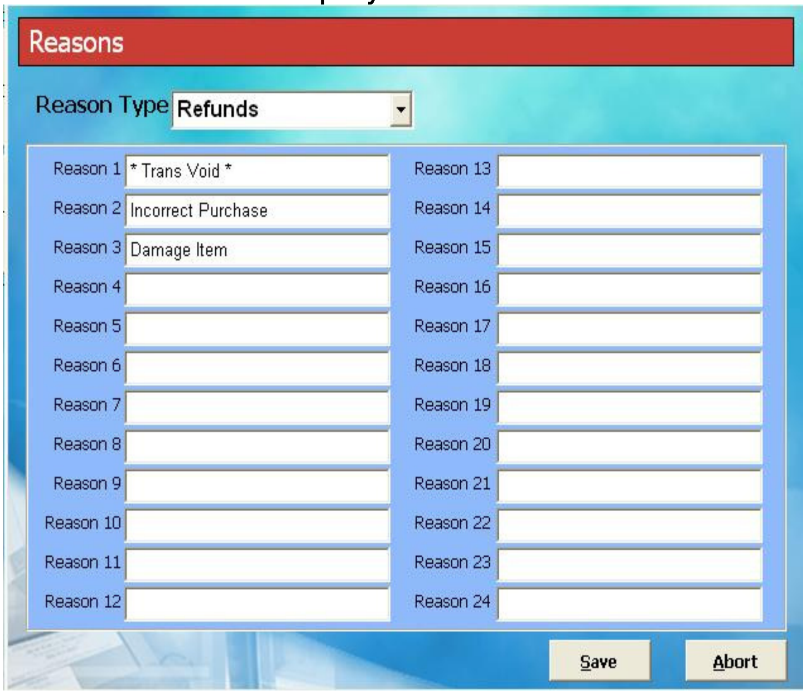
- Select

This displays the Reason Types Screen

- From the drop down list select the Reason Type you wish to add a value to



The Reason values are displayed



- In the Reason x boxes type in the reason for the Function *e.g. for a refund it may be 'undercooked', 'burnt' or 'damaged'.*
- Select Save to save the changes or Abort to go back to the previous page

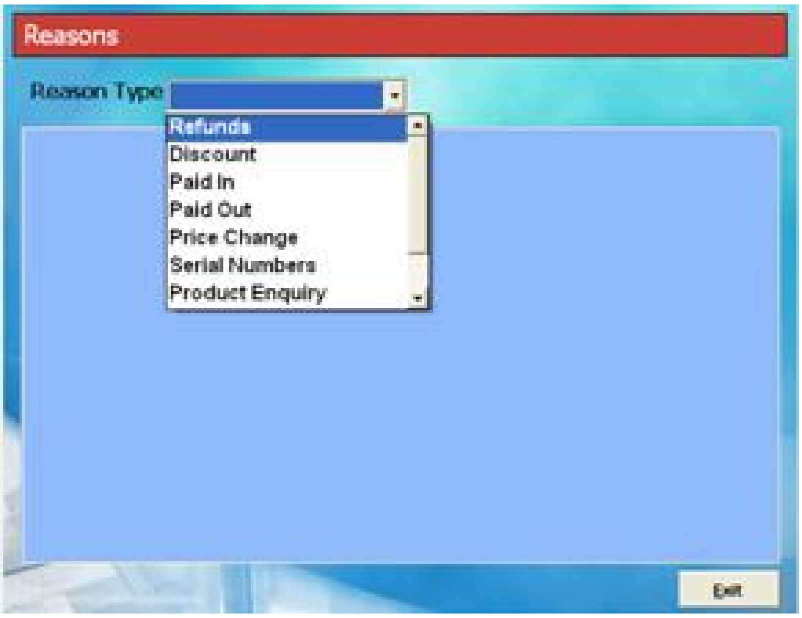
To remove a reason

- Select

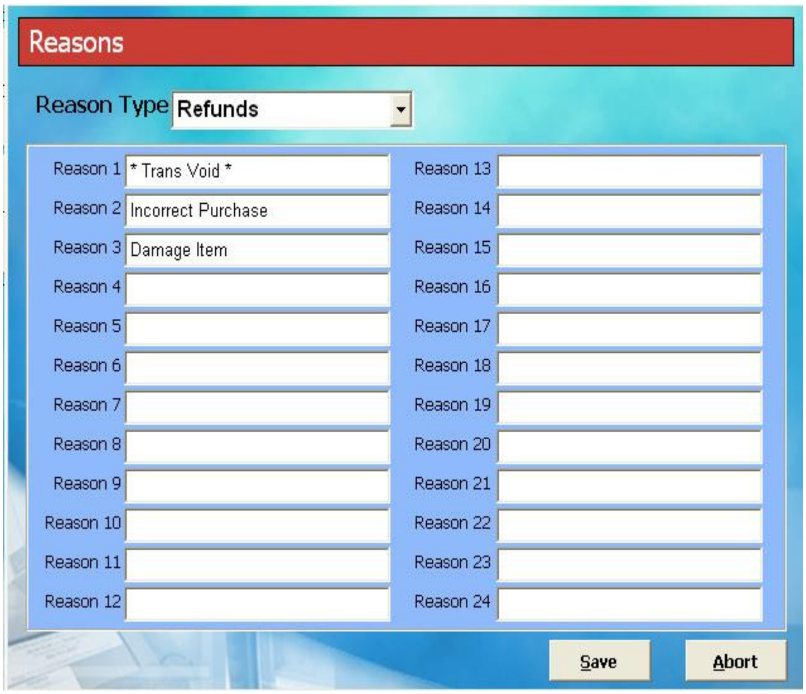
- Select

This displays the Reason Types Screen

- From the drop down list select the Reason Type you wish to remove the value from



The Reason values are displayed



- Delete the text
- Select Save

Sales Mode

Basic User Operations (Hospitality)

Sales Mode is the function which allows you to run a point of sale (till) from the Back Office machine, from Sale Mode you can carry out sales, process refunds manage tabs and tables amongst other things

The illustrations used in the Sales mode section may not reflect the layout of your tills exactly e.g. the colour, size and wording on the buttons may be slightly different depending on how your system has been configured.

To access Sales Mode from the Back Office

- Select
  

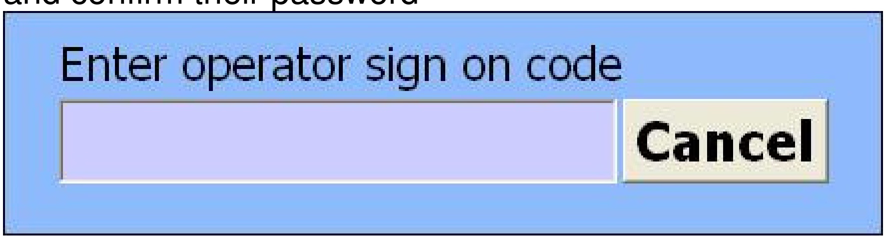
- Select
  

An example of a typical Hospitality layout:

Signing on to the till

There are 4 main ways of signing on to a till

1. Dallas Key – this is a fob that is attached the till (usually on the card swipe)
2. Manual Sign On – this is a box for the operator to enter their Sign On code and confirm their password



3. Button Sign On – this is a displayed button on the Sign On screen, it will also prompt for a Password if the user has been allocated one

4. Swipe Card – User has a designated card to swipe on to the till with, this may be password protected

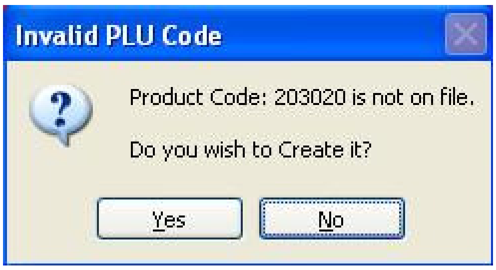
Making a Sale

- Select the product to be sold from the keyboard layout

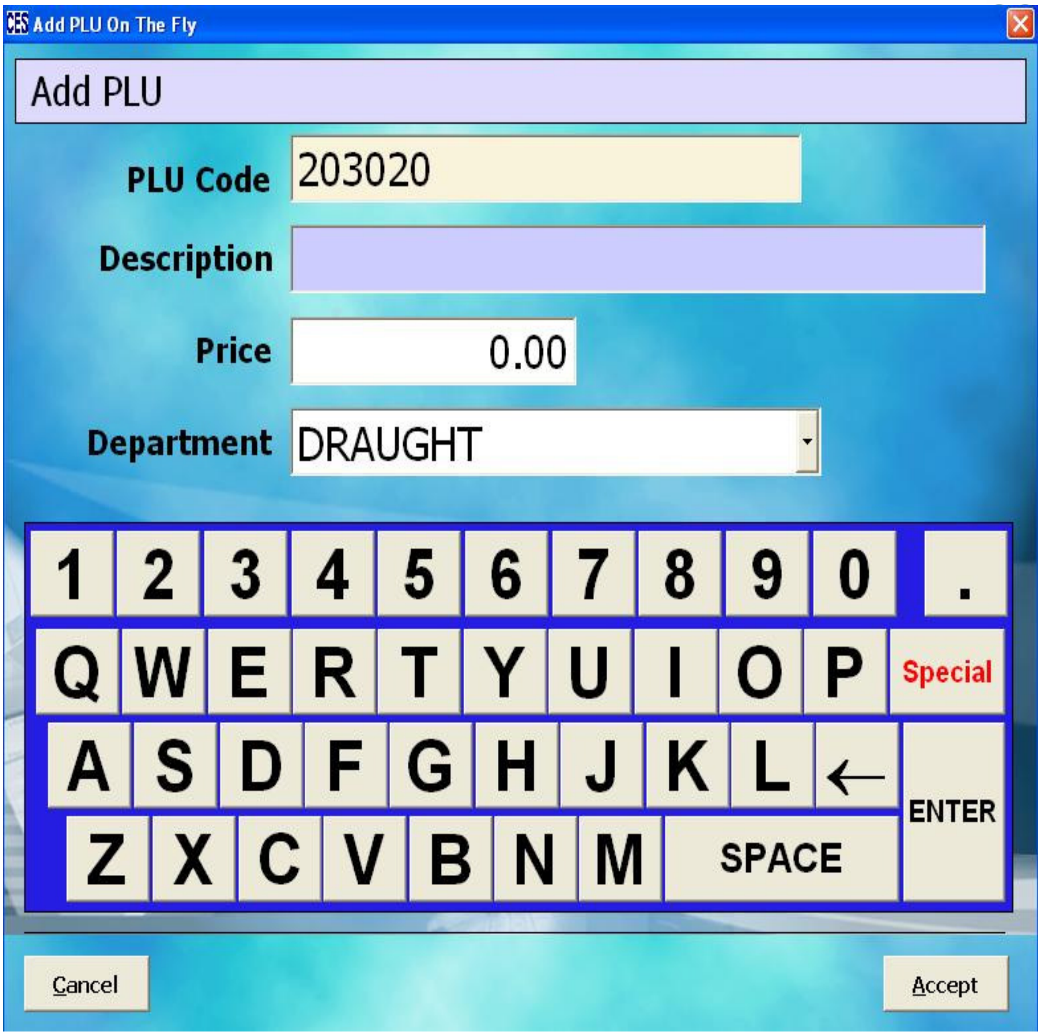
- The selected product and it's price will be displayed in the transaction screen

If the product is not recognised because it does not exist there is a setting that can be switched on to allow you to create products 'on the fly' in sales mode

You will see the following



- Select Yes



Enter the description, price and select the correct department

- Select Accept

The product will be pulled onto the transaction screen

Using the Quantity Button

The Quantity button can be used to sell multiples of a product

- Select the number to be sold from the number pad *e.g.6*
- Select

- Select the product

- The selected product and it's price will be displayed in the transaction screen

Selling with a Modifier

A Modifier is a button which allows a product to be sold at another size and or price *e.g. Half Pint, Double or Childs Portion*

- Select the modifier button

- Select the Product

- The selected product and it's price will be displayed in the transaction screen

	The Product must have a price against the unit in price levels; if not you will receive the message below

	It is important that modifiers are used correctly because if you are using Stock as well it will affect the amount of stock that is deducted

Free Text

This prints out on order printers and receipts but will not shown in the transaction pane

- Select

- Enter the text that you want to print beneath your product

	The product must be sold before you can use this function

Using a menu

A menu may be used when a number of items can be grouped together *e.g. all Starters* if you cannot fit the individual items onto the page

- Select the Menu button

The predefined list will be displayed

- Select the required product from the list or exit the menu
- The selected product and it’s price will be displayed in the transaction screen

Selling Products with Condiments

Condiments are extras that can be added to a profile of a product.

- When a product with a Condiment is selected the Condiment window is displayed

- Select the option required if the choice is not compulsory there will be an 'Exit' button displayed to leave the menu

Layaway

This function can be used to temporarily store a transaction; a 'Layaway' can be recalled by any operator

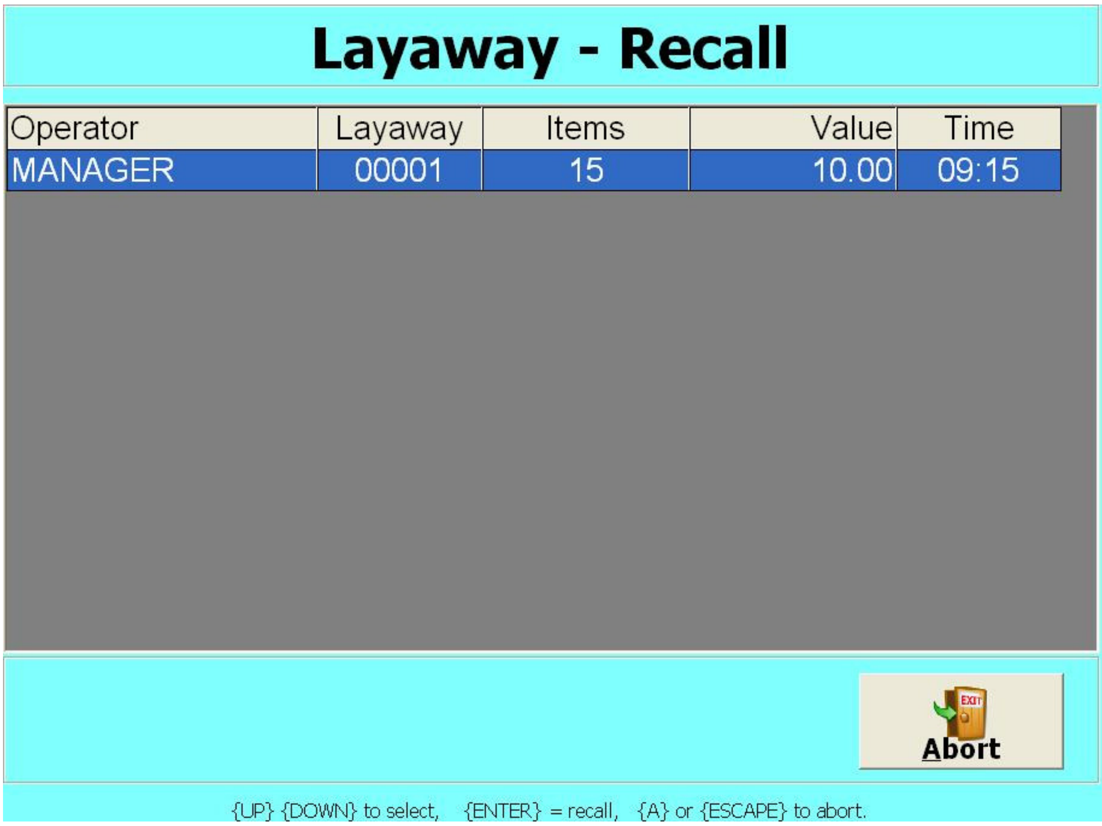
- Select

- The transaction will disappear and the main screen displayed

To recall a transaction that has been laid away

- Select

The Layaway recall screen is displayed



- Select the transaction to be recalled
- Select

The transaction is recalled to the transaction pane as normal

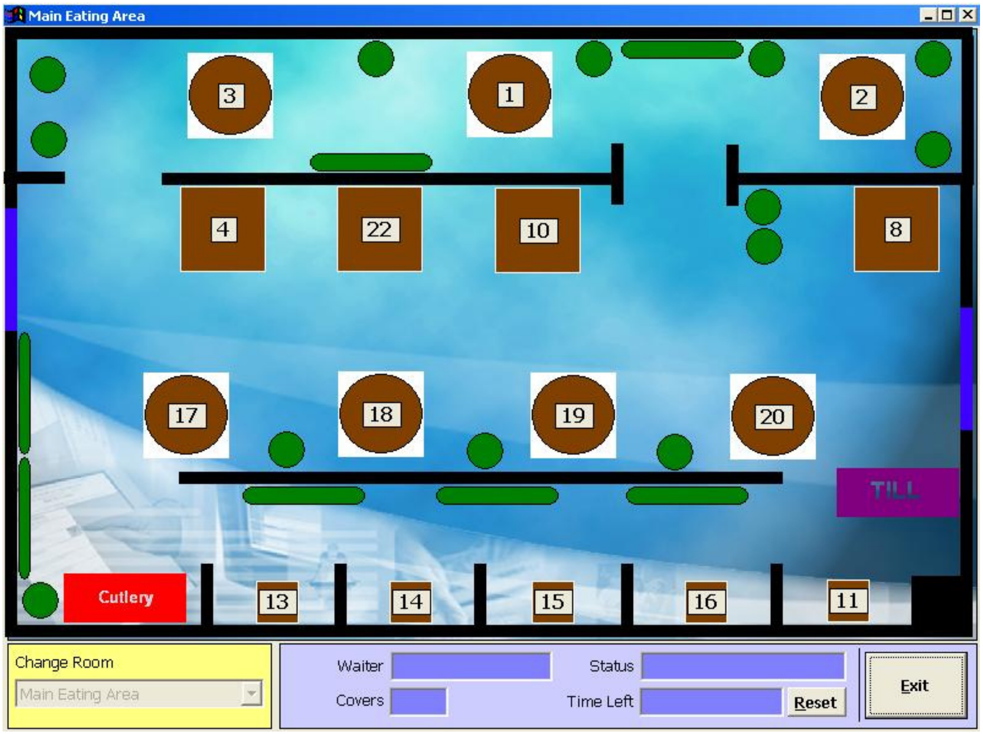
Storing to Tables/Tabs

Tables (with table planner) are used predominantly in the Restaurant environment

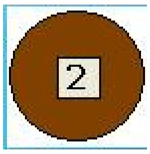
If you are in a transaction and want to store the products to a table:

- Select

The table planner screen is displayed



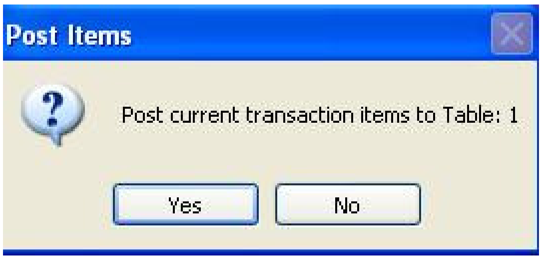
- Select the table number



The following message will appear

- Select Yes

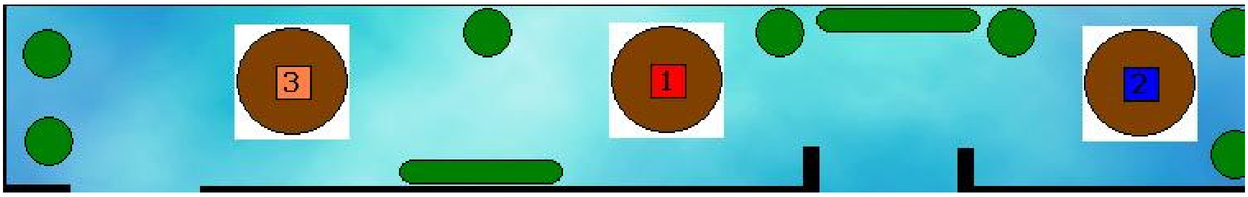
The following message will appear – this message will appear if you are opening the table in a transaction (with items being run through and not stored or cashed off)



- Select Yes
- Select

Table Status

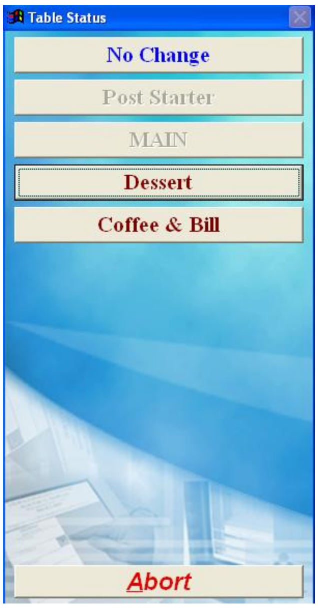
When you view the table planner the table numbers may show in different colours; this is referred to as the table status; this is configurable



In this example

- Table 3 = Starters
- Table 1 = Main Course
- Table 2 = Deserts

When the table is stored you will be asked which status the table is; the list may look similar to this



- Select No Change if the table status remains the same
- If they are now having Dessert the Dessert status should be selected

	Selecting the Abort option will take you back to the transaction – a status must be selected

	It is also possible to configure table statuses to work with time limits, if this limit has been exceeded the table will flash

Covers

Covers can be used either in a table or in a normal transaction

- Select the number from the number pad
- Select

You can see the number of covers displayed at the top of the POS

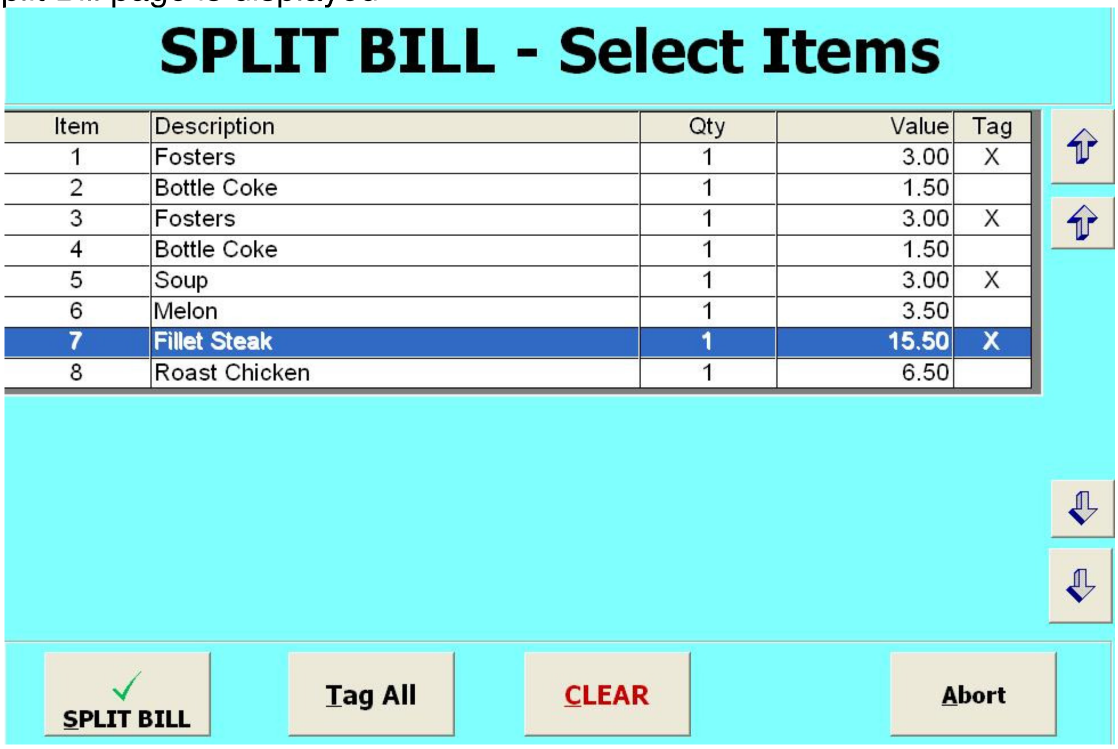
	If you have the prompt setting switched on the system will automatically prompt for the number of covers

Splitting the Bill

Splitting the bill enables a table/tab to be split up into a number of bills that can be paid separately

- Recall the table
- Select

The Split Bill page is displayed



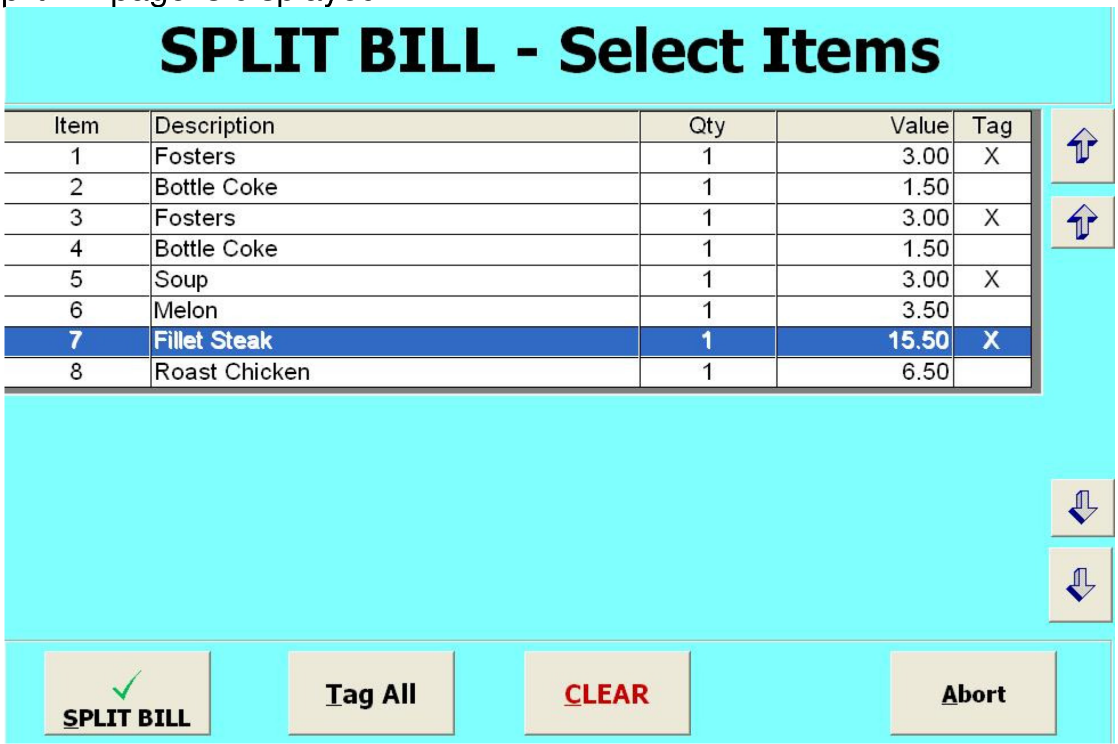
- Select the items to be taken off of the current bill by clicking on the line
- Select

The products appear on the transaction screen the bill can now be paid

Moving products to another table

- Recall the table
- Select

The Split Bill page is displayed



- Select the items to be taken off of the current bill by clicking on the line
- Select

The products appear on the transaction screen

- Select

- Select the table number you want to move the items to
- Store the table

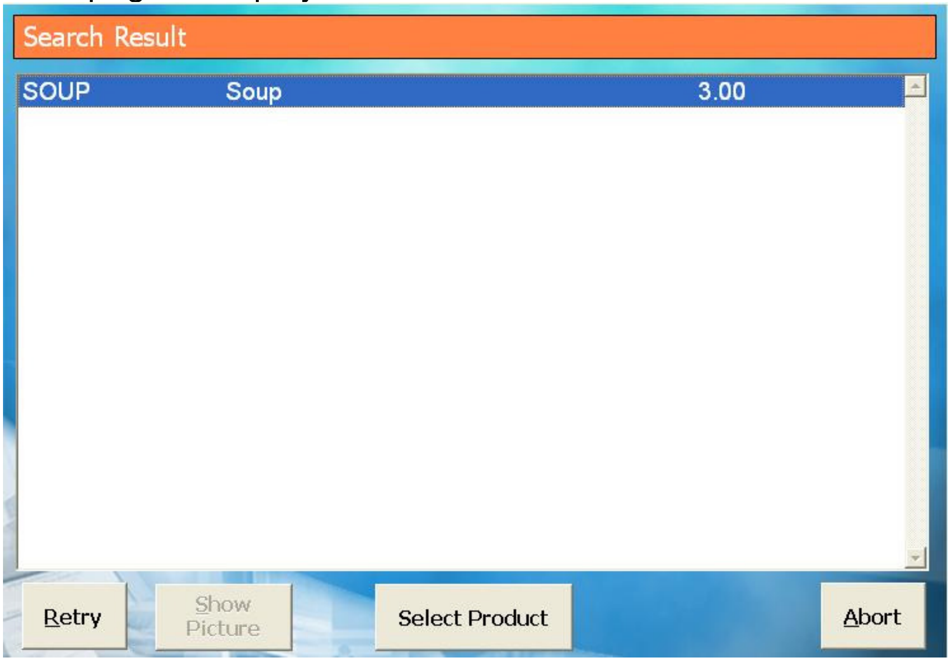
Product Search

Product Search can be used when you cannot find a specific product on the terminal

- Select

- Enter at least one character of the PLU or description
- Select Enter

The results page is displayed



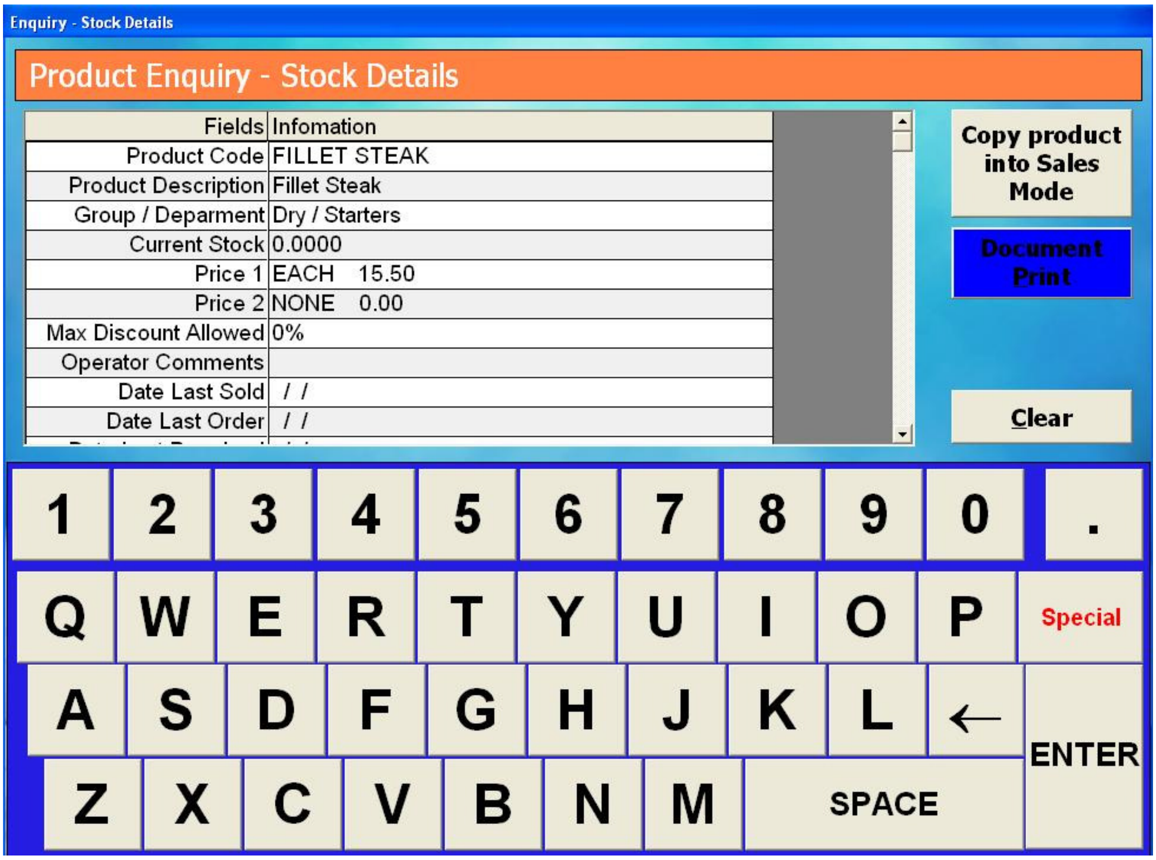
- To sell the product press the Select Product button
- Retry will take you back to the search entry page
- Abort will exit from the Product Search mode

	If you cannot find the product using the search facility try un-ticking the ‘Include Only Items In Stock’

Product Enquiry
Product Enquiry can be used when you need to know certain details about a product; the information you see is configured by your dealer so every system will be different

- Select

The Product Enquiry – Stock Details Page will be shown

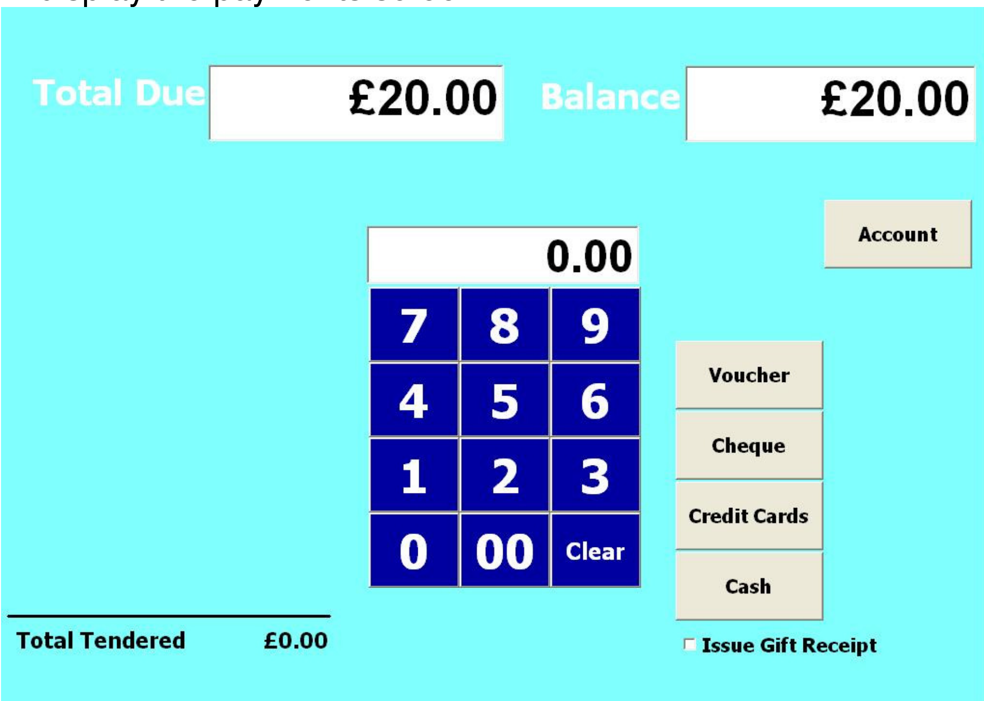


Paying a transaction

When all the items have been selected and you are ready to accept payment

- Select

This will display the payments screen



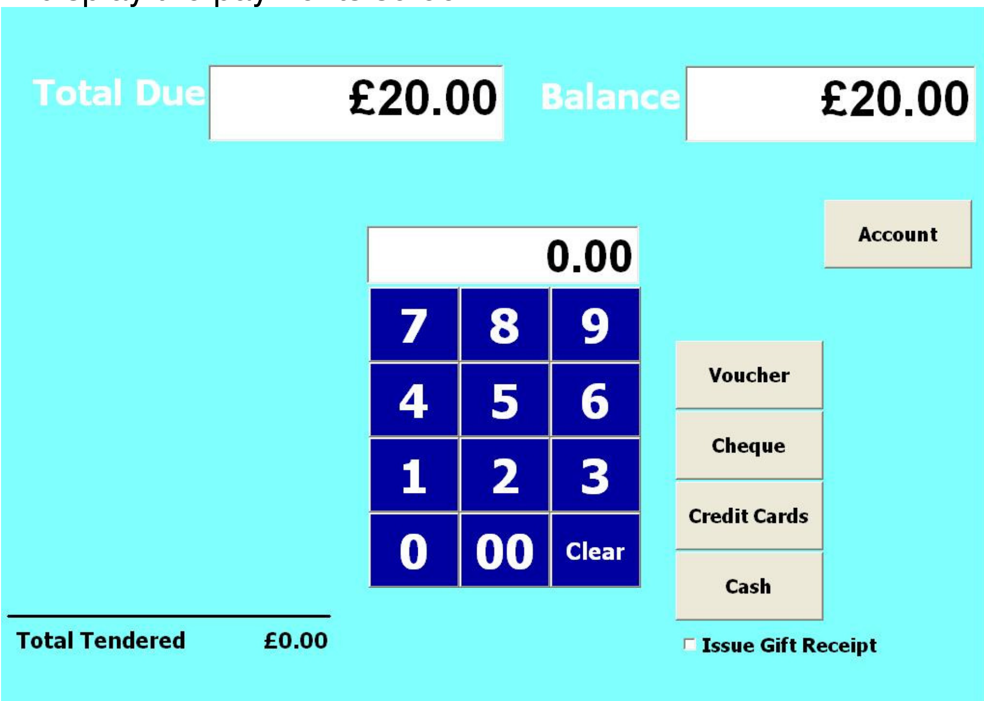
Using the numeric keypad enter the amount that is being tendered *e.g. 2000*

- Select the tender type from the right hand side *e.g. cash*

To accept multiple Tender Types
When all the items have been selected and you are ready to accept payment

- Select

This will display the payments screen



Using the numeric keypad enter the amount that is being tendered *e.g. 500*

- Select the tender type from the right hand side *e.g. cash*

- Enter the next amount to be tendered *e.g. 1000*

- Enter the next amount to be tendered *e.g. 500*

Printing a Receipt

- Select

When in a transaction or an open table and receipt is selected a bill will be printed, if you have just signed in and receipt is selected the last receipt (for the terminal) will be printed

You may have product countdown configured, this is a number displayed by the product that advises the user how many are in stock – it will only display if the figure is positive

Basic User Operations (Retail)

The illustrations used in the Sales mode section may not reflect the layout of your tills exactly e.g. the colour, size and wording on the buttons may be slightly different depending on how your system has been configured.

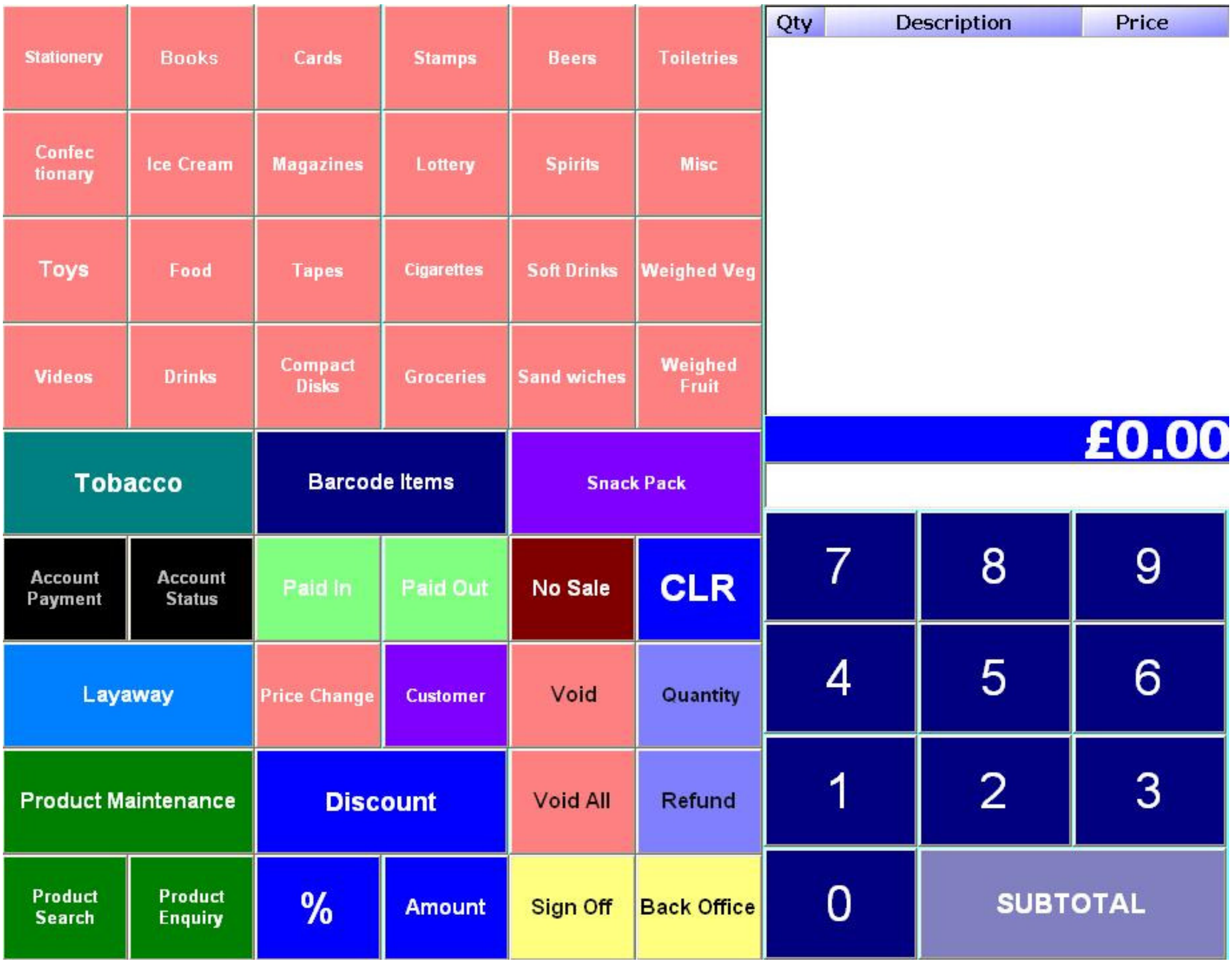
Sales Mode is the function which allows you to run a point of sale (till); from Sale Mode you can carry out sales, process refunds manage tabs and tables amongst other things

To access Sales Mode from the Back Office

- Select
  

- Select
  

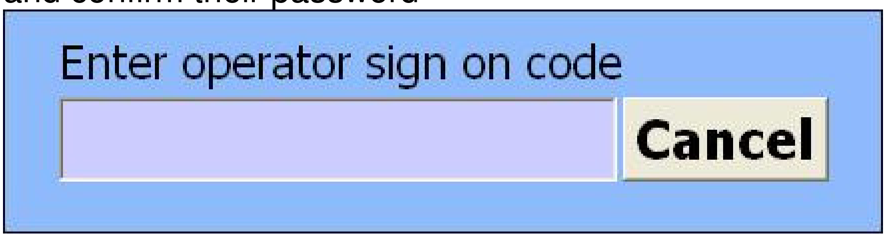
An example of a typical Retail layout:



Signing on to the till

There are 4 ways of signing on to a till

1. Dallas Key – this is a fob that is attached the till (usually on the card swipe)
2. Manual Sign On – this is a box for the operator to enter their Sign On code and confirm their password



3. Button Sign On – this is a displayed button on the Sign On screen, it will also prompt for a Password if the user has been allocated one

4. Swipe Card – User has a designated card to swipe on to the till with, this may be password protected

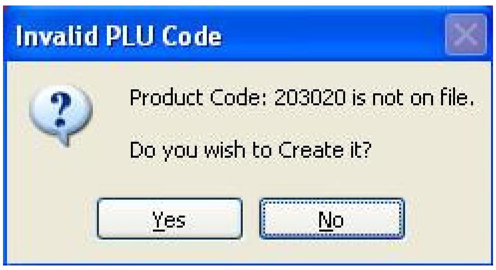
Making a Sale

- Select the product to be sold from the keyboard layout

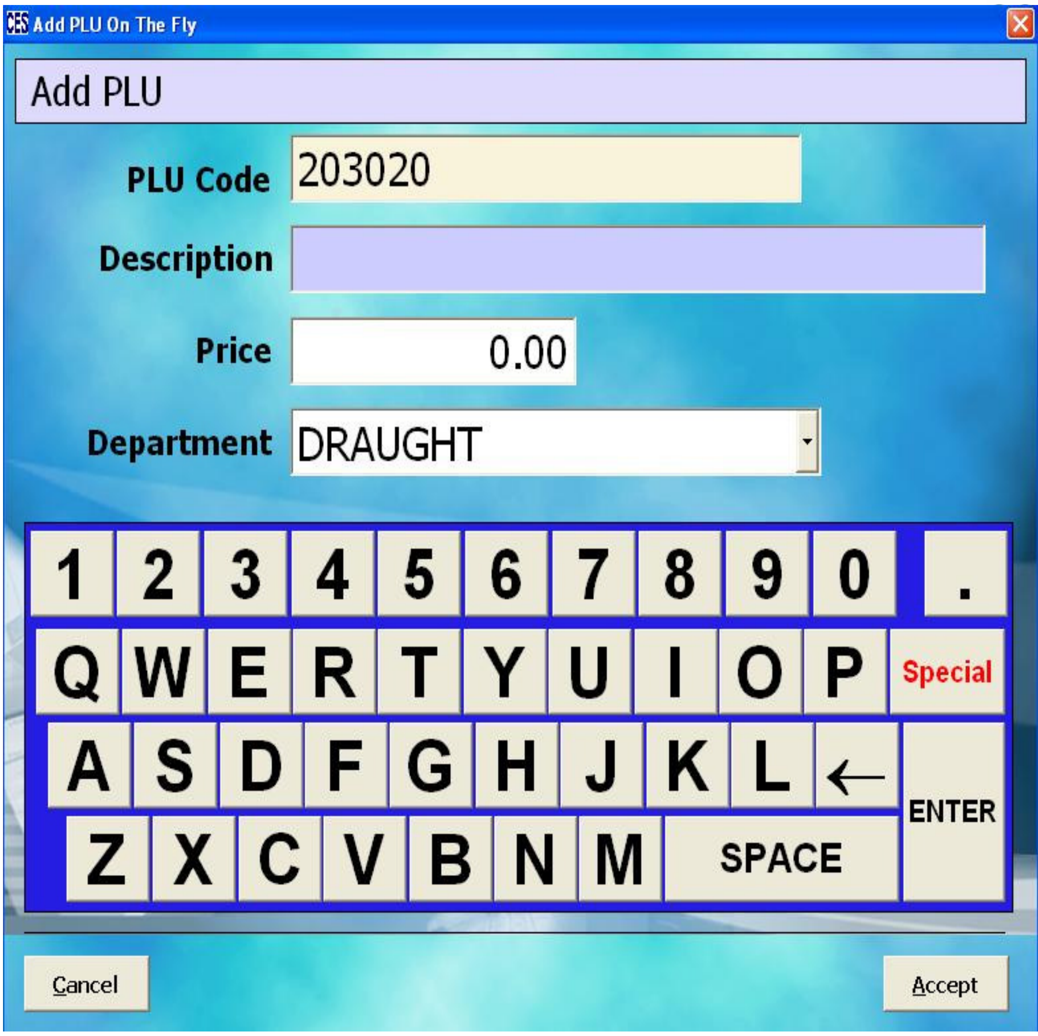
- The selected product and it's price will be displayed in the transaction screen

If the product is not recognised because it does not exist there is a setting that can be switched on to allow you to create products 'on the fly' in sales mode

You will see the following



- Select Yes



Enter the description, price and select the correct department

- Select Accept

The product will be pulled onto the transaction screen

Product code

Product Code can be used when you have memorised the PLU and it is quicker to type it in than look for the button or if the barcode is not scanning

- Enter the PLU e.g. 12345
- Select

The product and price appears in the transaction pane

Using the Quantity Button

- Select the number to be sold from the number pad *e.g.6*
- Select

- Select the product

- The selected product and it's price will be displayed in the transaction screen

Free Text

This prints out on order printers and receipts but will not shown in the transaction pane

- Select

- Enter the text that you want to print beneath your product

☝	The product must be sold before you can use this function

Using a menu

A menu may be used when a number of items can be grouped together *e.g. all Starters* if you cannot fit the individual items onto the page

- Select the Menu button

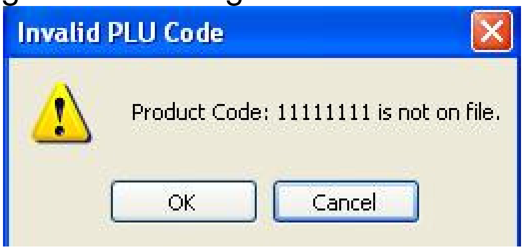
The predefined list will be displayed

- Select the required product from the list or exit the menu
- The selected product and it's price will be displayed in the transaction screen

Using the scanner for products with barcodes

- From Sales Mode hold the product with the barcode across the beam from the scanner
- The product name and price appears in the transaction pane

If you get this message



The barcode is not in the product record – add as a PLU

Layaway

This function can be used to temporarily store a transaction; a ‘Layaway’ can be recalled by any operator

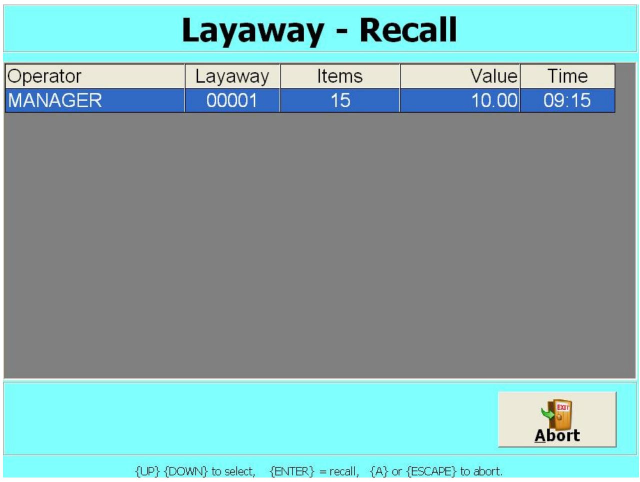
- Select

- The transaction will disappear and the main screen displayed

To recall a transaction that has been laid away:

- Select

The Layaway recall screen is displayed



- Select the transaction to be recalled
- Select

The transaction is recalled to the transaction pane as normal

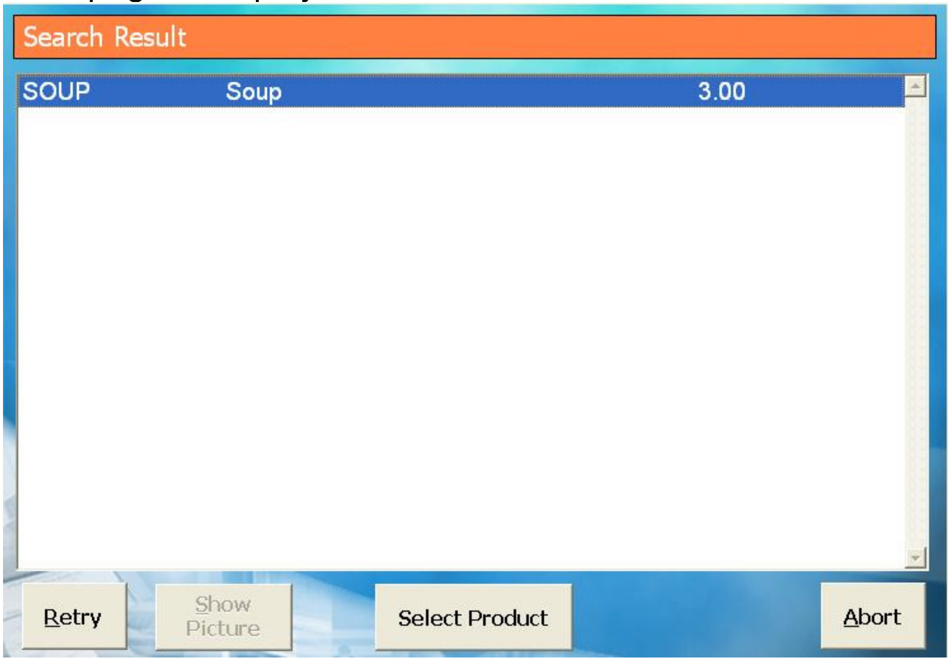
Product Search

Product Search can be used when you cannot find a specific product on the terminal

- Select

- Enter at least one character of the PLU or description
- Select Enter

The results page is displayed



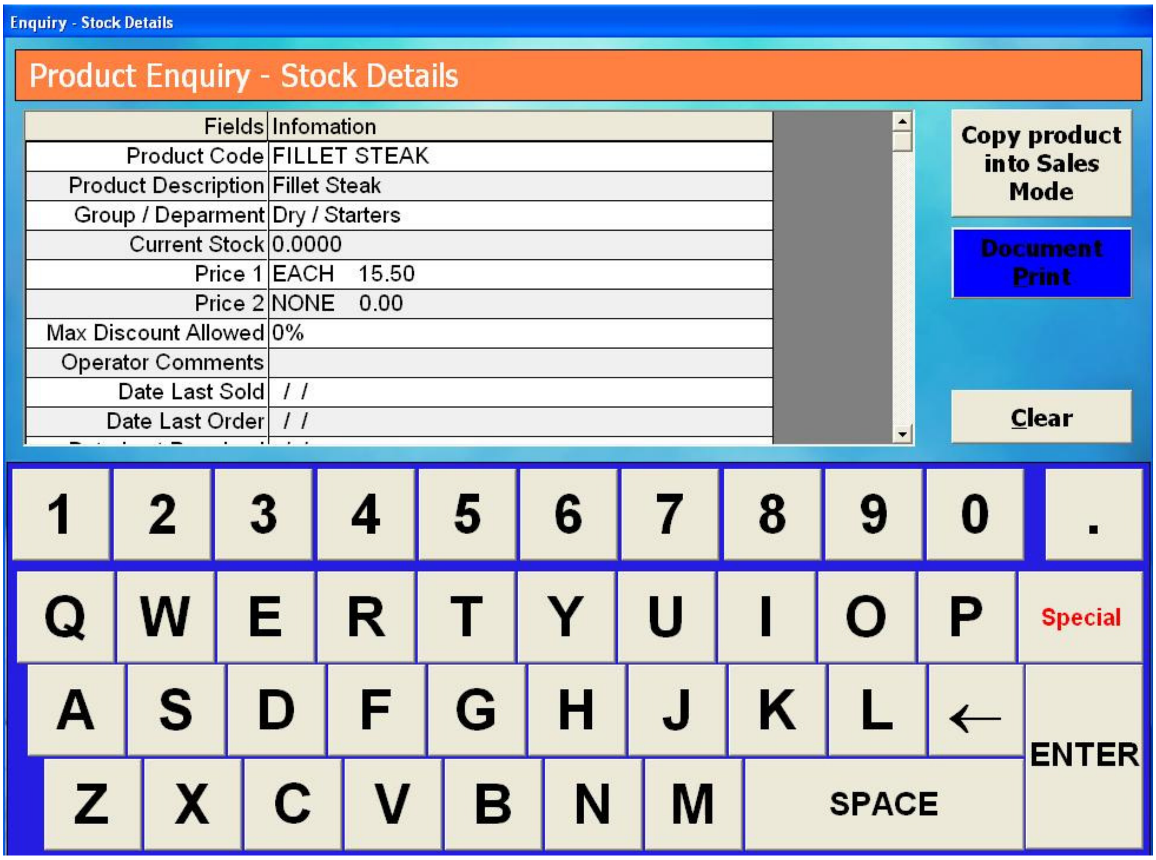
- To sell the product press the Select Product button
- Retry will take you back to the search entry page
- Abort will exit from the Product Search mode

☝	If you cannot find the product using the search facility try un-ticking the 'Include Only Items In Stock'

Product Enquiry
Product Enquiry can be used when you need to know certain details about a product; the information you see is configured by your dealer so every system will be different

- Select

The Product Enquiry – Stock Details Page will be shown

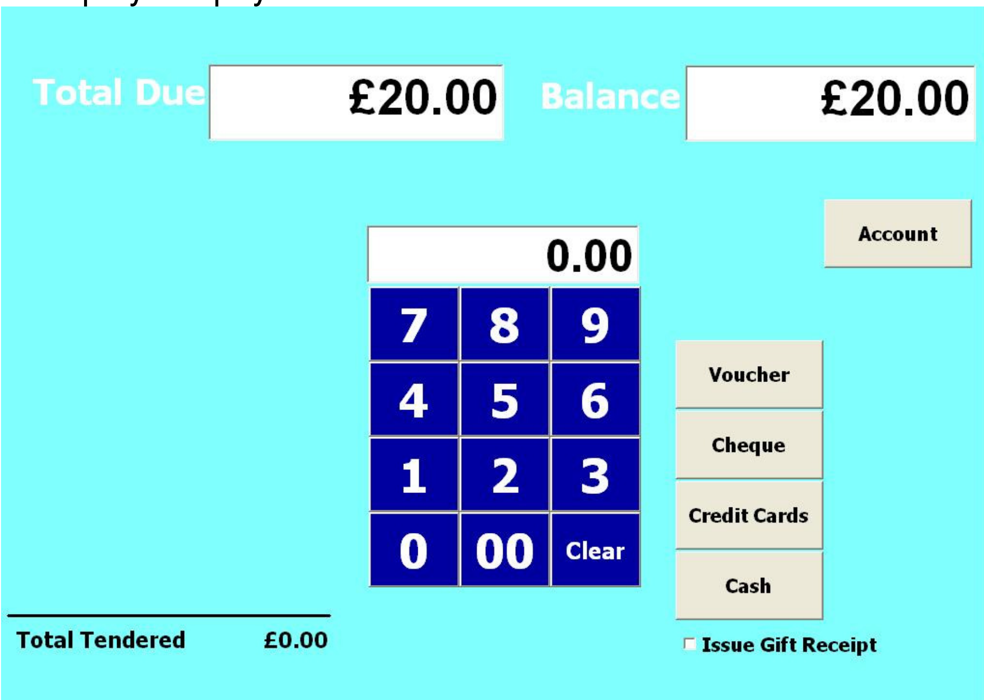


Paying a transaction

When all the items have been selected and you are ready to accept payment

- Select

This will display the payments screen



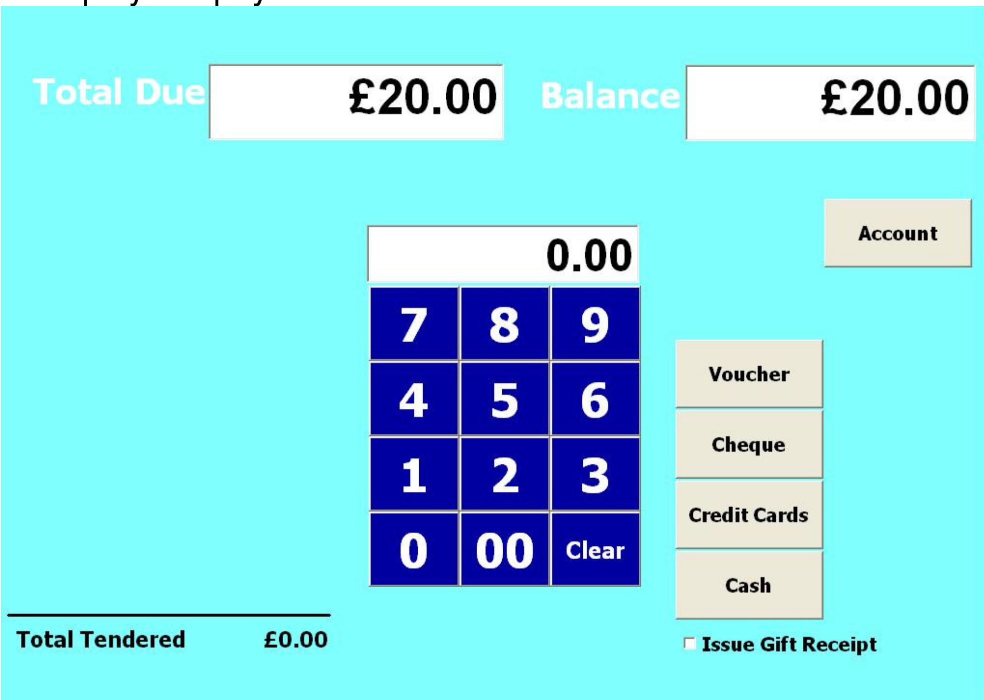
Using the numeric keypad enter the amount that is being tendered *e.g. 2000*

- Select the tender type from the right hand side *e.g. cash*

To accept multiple Tender Types
When all the items have been selected and you are ready to accept payment

- Select

This will display the payments screen



Using the numeric keypad enter the amount that is being tendered *e.g. 500*

- Select the tender type from the right hand side *e.g. cash*

- Enter the next amount to be tendered *e.g. 1000*

- Enter the next amount to be tendered *e.g. 500*

Printing a Gift Receipt

From the Subtotal screen select:

Printing a Receipt:

- Select

	When in a transaction or recalled lay away and receipt is selected a bill will be printed, if you have completed a transaction and receipt is selected then a receipt will be printed.

	You may have product countdown configured, this is a number displayed by the product that advises the user how many are in stock – it will only display if the figure is positive 

Functions

The illustrations used in the Sales mode section may not reflect the layout of your tills exactly e.g. the colour, size and wording on the buttons may be slightly different depending on how your system has been configured. Some of these functions may not be available depending on specifications given to your dealer

Fixed Discount

- Ring the items through
- Select

This will discount the transaction by the predefined amount

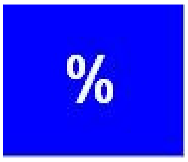
Item Discount

This will apply a discount to the last item on the transaction. You can either discount an item by %, sell for a reduced price or take an amount off

- Ring the item through
- Select

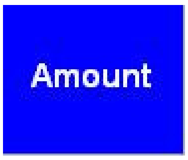
Enter the amount e.g. 10

- Select either



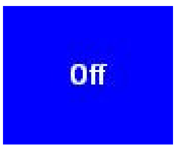
this will reduce the item selling price by 10%

Or



this will sell the item for 10p

Or



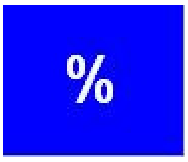
this will take 10p off of the selling price

All Discount (Subtotal Discount)
This may be configured to allow the items to be tagged individually but is usually set up to apply to all items in a transaction

- Ring the items through
- Select

Enter the percentage amount to be discounted

- Select



	Discount will only be applied up to the max discount percentage in the product record

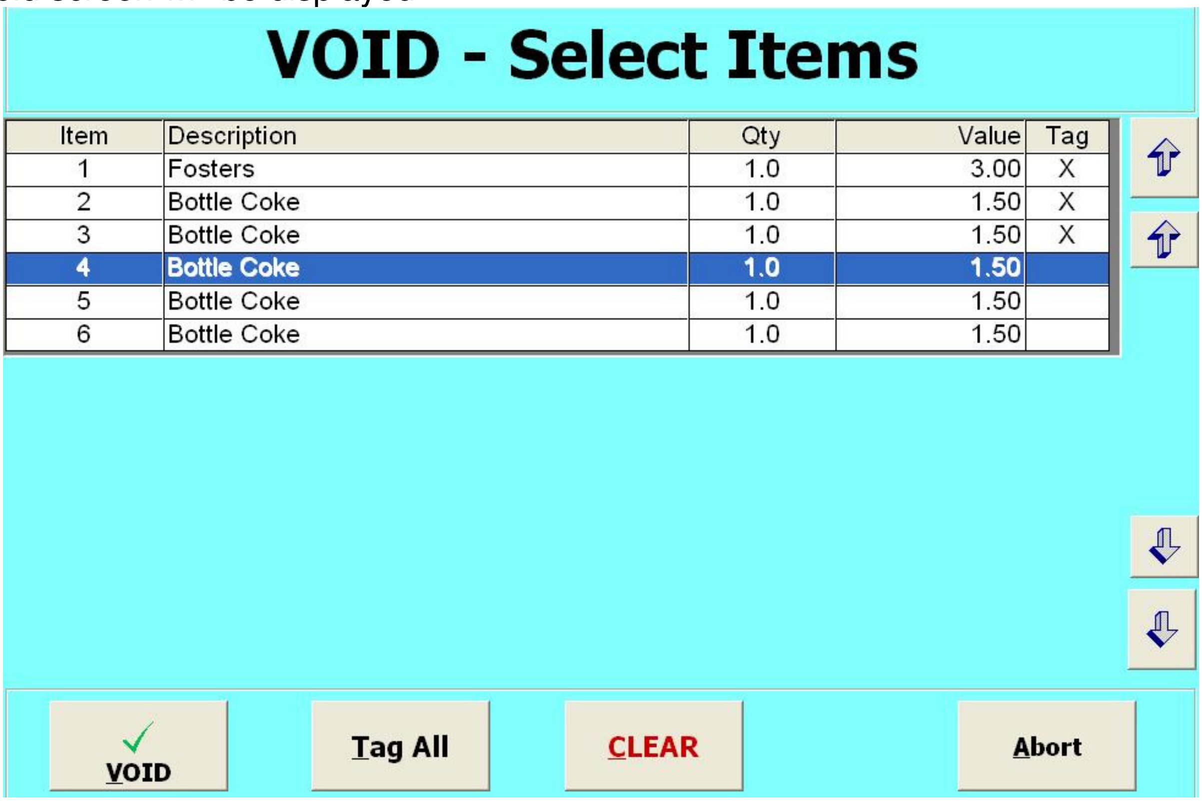
Void/Void Entire Transaction

This will allow you to either remove an item or several items from a transaction or void the entire transaction

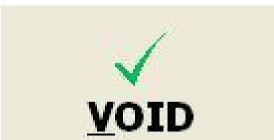
To remove 1 item or a selection of items

- Select

The void screen will be displayed



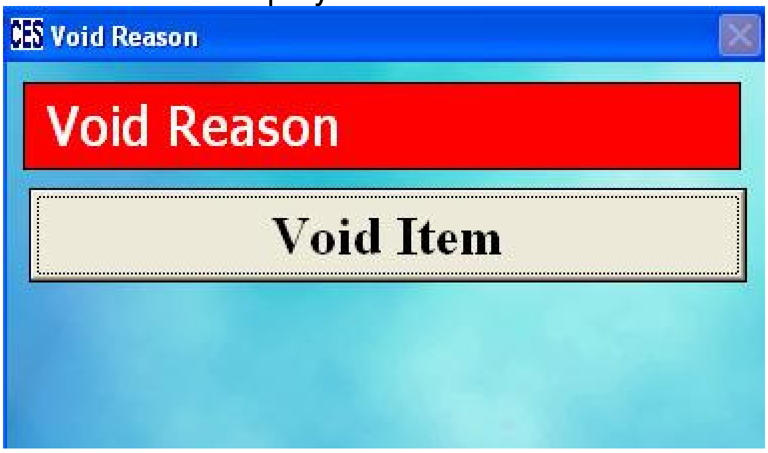
- Tag the item/items to be removed
- Select



Void Entire Transaction

- Select

The reason menu is displayed



- Select the reason

	You may also have an error correct button which will allow 1 item to be removed or void last item which will remove the last item on the transaction

Refund Item

This will allow the operator to refund an item

- Select

- Select the product to be refunded

The item will be displayed in the transaction pane as a negative amount

Refund Current Transaction

This will allow the operator to refund all items on one transaction

- Ring the products through to be refunded
- Select

All the items in the transaction will be shown as a negative

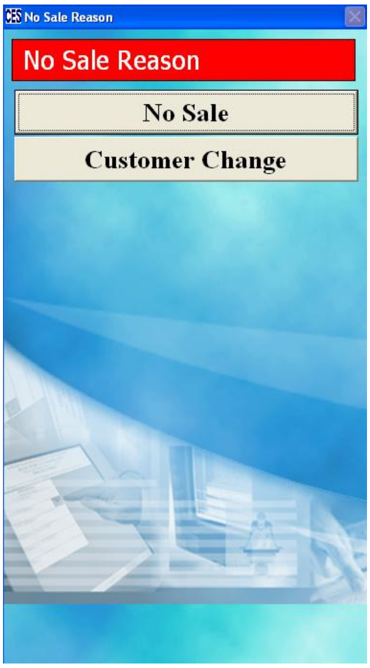
	The refund function will automatically add the product back in to stock.

No Sale

The No Sale button is used to open the till drawer *e.g. to give a customer change* there is a reason menu attached to the function. You cannot do a No Sale in a transaction.

- Select

- Select the reason for opening the drawer



Paid Out

The Paid Out function is for accounting for monies that have left the till during the trading day *e.g. the window cleaner was paid, petty cash for the corner shop*, there is a reason menu attached to the function. This function cannot be done in a transaction

- Select

The Paid Out window is displayed

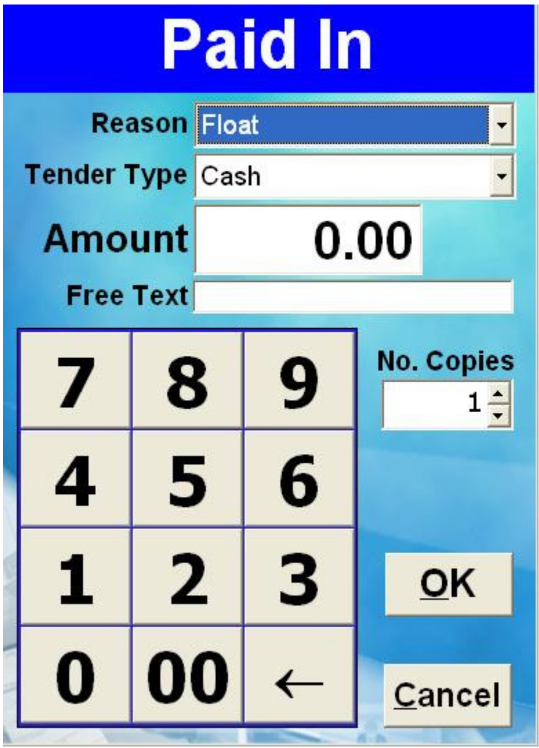
- From the drop down box select the reason for the function
- From the drop down box in the ‘Tender Type’ field select the method the person was given
- Type the amount in the ‘Amount’ field
- The free text field is for any extra notes you may want to add *e.g. if it was Petty Cash you could add milk into the free text field*
- No. Of Copies is the number of receipts you want to print once the OK button has been selected
- Select OK to save the ‘Paid Out’

Paid In

The Paid In function is to account for monies that have been added to the till during the trading day *e.g. Float*, there is a reason menu attached to the function. This function cannot be done in a transaction

- Select

The Paid In window is displayed



- From the drop down box select the reason for the function
- From the drop down box in the 'Tender Type' field select the tender type of the money
- Type the amount in the 'Amount' field
- The free text field is for any extra notes you may want to add *e.g. if you added an extra float because you were unusually busy*
- No. Of Copies is the number of receipts you want to print once the OK button has been selected
- Select OK to save the 'Paid In'

Price Change

The Price Change Function is mainly used for reducing (but will increase as well) the price of a product outside of a discount *e.g. if an item is damaged and you wish to knock down the price*.

- Ring through the item you want to change the price of
- Select

The Price Change Window is displayed

- Enter the price you want to charge in the 'New Price' field
- From the drop down box select the reason for the Price Change
- Select OK to change the price

	This will always change the price of the last product in the transaction and does not change the price permanently (there is a setting that can do this so this may be switched on)
	You may have product countdown configured, this is a number displayed by the product that advises the user how many are in stock – it will only display if the figure is positive 

Terminal Reports

Current Financial

Some of these reports will only appear if the feature is configured.

Report Name	Information
Current Financial	• Number and Value of Transactions • Nett Sales • Tender Type breakdown • Number of No Sales • Number and Value of Voids • Loyalty Point Issued • VAT Analysis
Group/Dept	• Group Value and Volume • Department Value and Volume
Product Sales	• Product Value and Volume • Overall total
Sales Commission	• Personnel Names • Band Rates • Transaction Count • Sale Value • Commission Value • Overall total Sale Value per User • Overall total Commission Value per User • Overall total Sale and Commission Value for all Users
Charge Sheet Status	• List of Open Tables Volume and Value • Overall Volume and Value
Mix and Match	• Mix and Match offers used • Number of times fired • Discount Given

Archive/Central – Sales

These Reports will only have data once the End of Day procedure has been done.

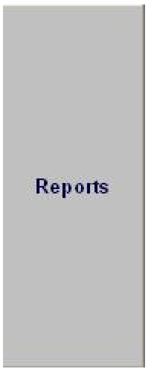
Because they are period defined reports, once the report has been selected you will need to choose a start date and/or a finish date for the report. Certain reports may also ask for Terminals to be defined by a tick box, the default is set to all terminals.

Report Name	*Information*
Daily Sales	• Number and Value of Transactions • Nett Sales • Tender Type breakdown • Number of No Sales • Number and Value of Voids • Loyalty Point Issued • VAT Analysis
Weekly Sales By Day	• By Day for a 1 week period • Number and Value of Transactions • Nett Sales • Tender Type breakdown • Number of No Sales • Number and Value of Voids • Loyalty Point Issued • VAT Analysis
Consolidated Weekly Sales	• 1 week period total values • Number and Value of Transactions • Nett Sales • Tender Type breakdown • Number of No Sales • Number and Value of Voids • Loyalty Point Issued • VAT Analysis
Sales By Period	• User defined period totals • Number and Value of Transactions • Nett Sales • Tender Type breakdown • Number of No Sales • Number and Value of Voids • Loyalty Point Issued • VAT Analysis
Sales Commission	• User defined period • User Sale Value • User Commission earned • Overall Sale Value • Overall Commission Value
Operator Sales	• User Defined Period • By Operator • Number and Value of Transactions

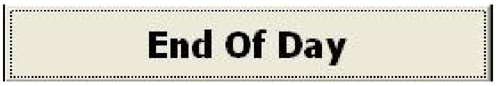
	• Nett Sales • Tender Type breakdown • Number of No Sales • Number and Value of Voids • Loyalty Point Issued • VAT Analysis
Group/Dept	• User Defined Period • Period Totals • Group Value and Volume • Department Value and Volume
Product Sales Report	• User defined period totals • Product Value and Volume • Overall total
Hourly Report	• Graphical representation of hourly sales by product count • Graphical representation of hourly sales by sales value • Graphical representation of hourly sales by transaction count
Mix and Match	• User defined period totals • Mix and Match offers used • Number of times fired • Discount Given

End of Day

Each till must be declared at the end of the day/shift.

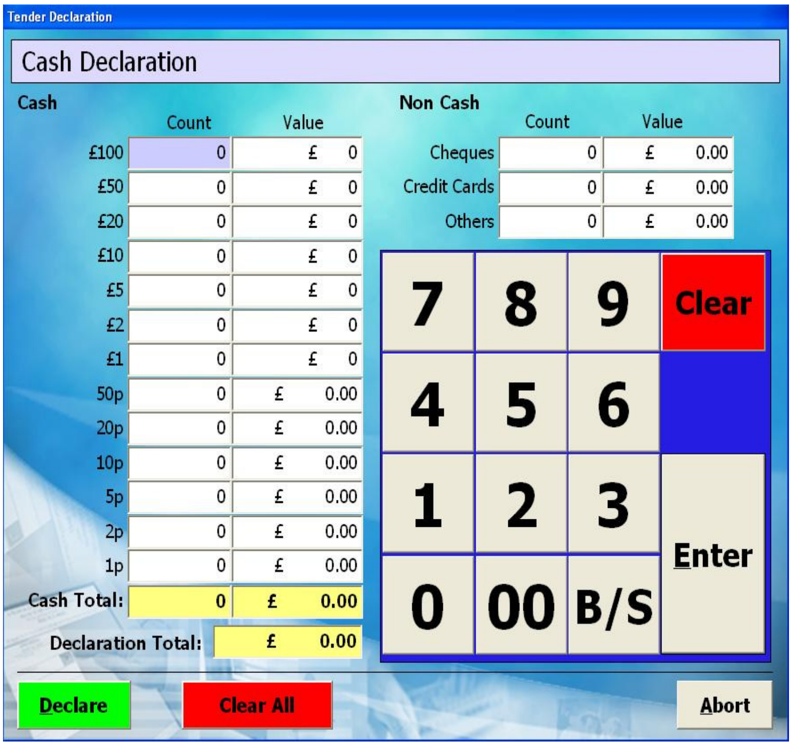


- Select



Cash Declaration

This is configurable and may not be switched on – it allows you to reconcile your cash and drawer figure on each till at end of day. The amount declared is the total amount of cash, cheques, cards and ‘other’ tender types in the till and includes floats entered.



- Enter either the number of notes in the count box OR the value of the notes in the value box, in the non cash section enters the value against the tender type; you may also enter the number as well but this is not mandatory. The cash and declaration totals will be automatically calculated.

- Select

Or

- Select

The Select Date box is displayed

- Select the date that the current transactions are to be date stamped with and press OK (when viewing reports the data the data will report under this date)

The end of day confirmation selection will appear

- Select Yes to confirm the date and to transfer the data; if no is selected the declaration is forgotten and the current financials remain in place

☝	Declarations are configurable so they may use one of the examples above or none at all

Sales Review

Sales Review enables you to view either Central/Archive Sales or Current Local Sales from the Back Office, drill down into the transaction and reprint receipts. The default when launching the software will be Central/Archive (all sales up until the last end of day), once you have changed the criteria to be local (for the machine you are on) this will be the default until you exit and load the software again

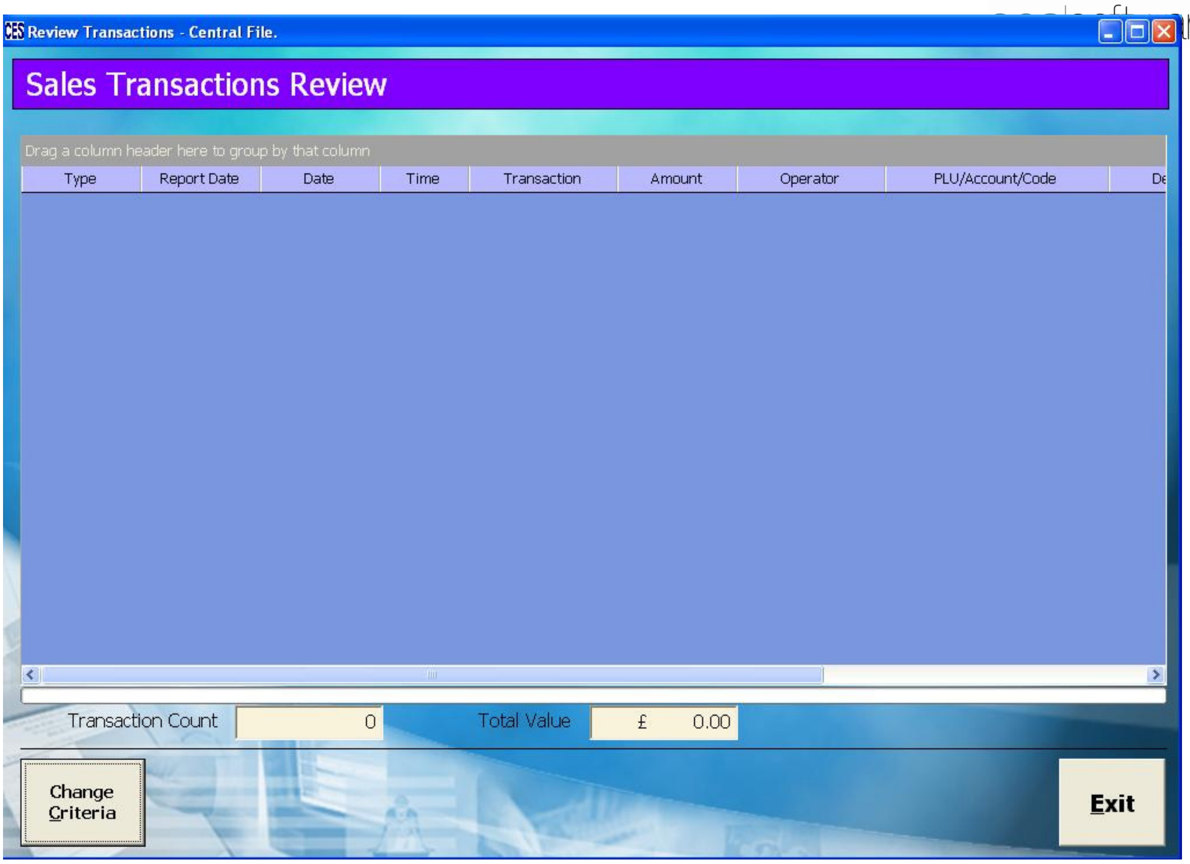
Central/Archive Sales

- Select

- Select

The Sales Transaction review screen will be shown

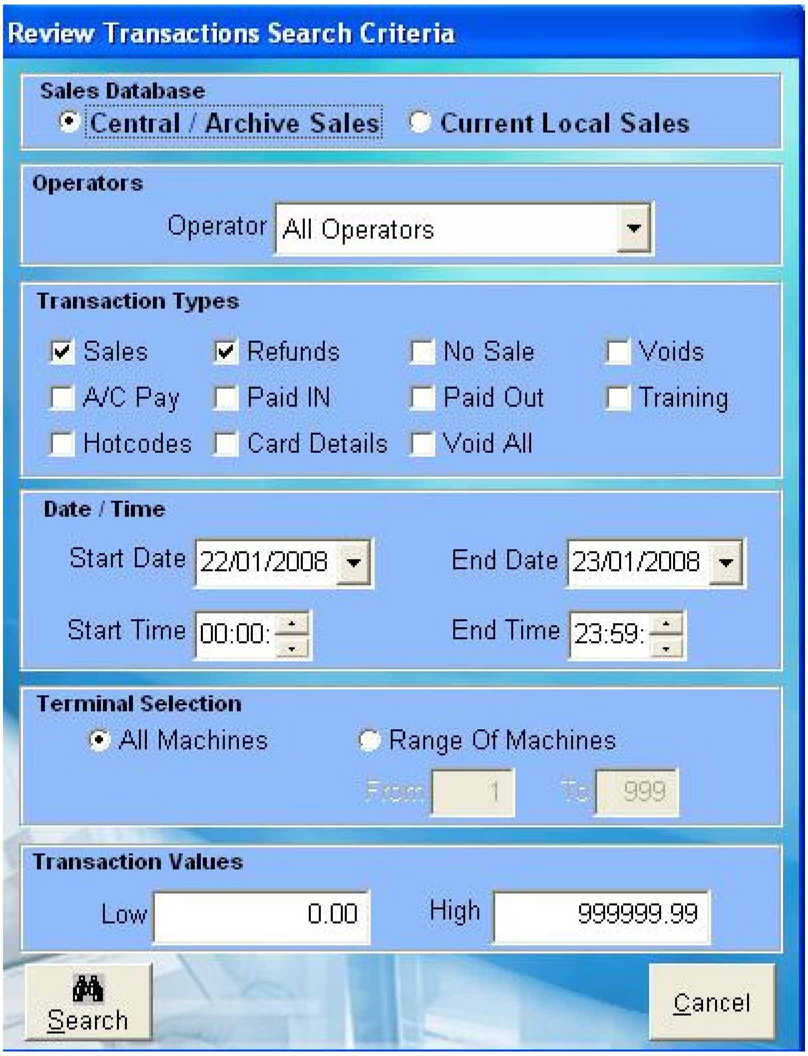
	Note: the screen may show data if a search has been done and the software has not been closed



To find a transaction from a past date

- Select

The search criteria screen is displayed

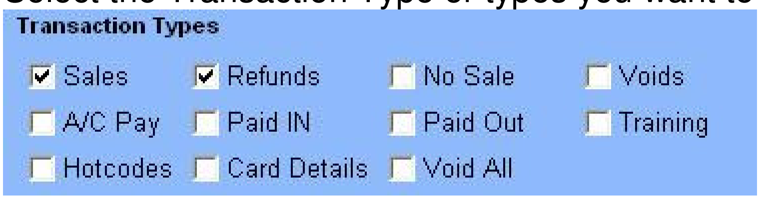


To be in Central/Archive Sales the End of Day process must have been done, the date chosen at end of day will be the date the sales will appear in reports

- Leave the default as Central/Archive Sales

- Select the Operator (if known) if not keep as All Operators

- Select the Transaction Type or types you want to find

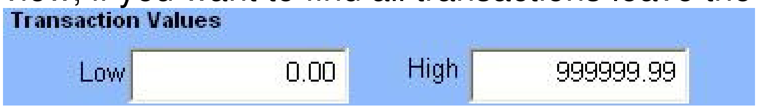


- Select the date or the date range of the transactions you want to view, if you want you can narrow this down by time by using the start and end time selections

- Chose the Terminals of the transactions you want to view, if you want to see Terminal 1 select Range of Machines and From 1 To 1

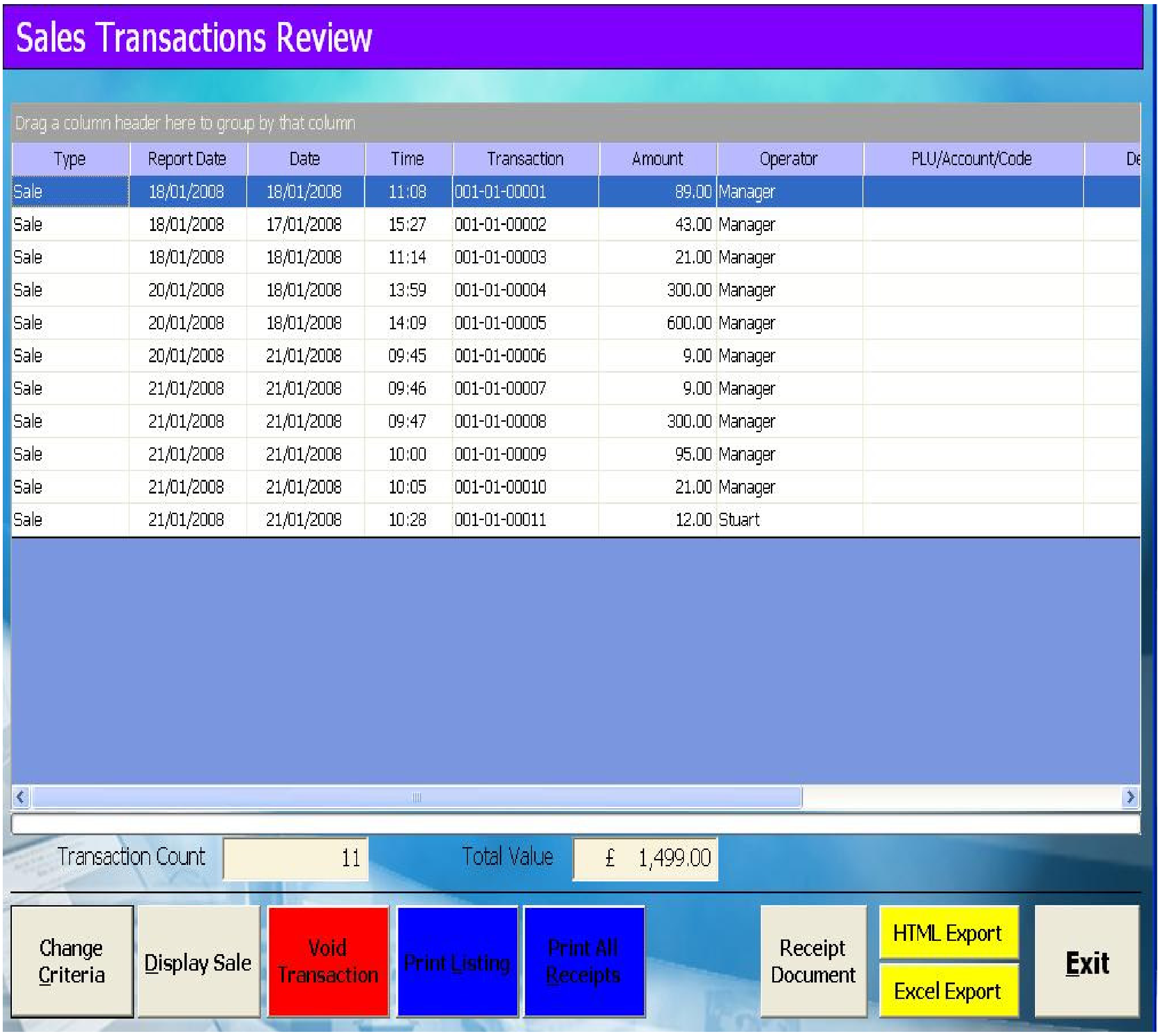
☝	The terminal is the till it was cashed off from

- Select the minimum and maximum value of the transactions you want to view, if you want to find all transactions leave the default as it is



- Select

The Sales Transactions Review screen will be shown with the relevant data using the criteria above we will see all sales and refund transactions on all machines by all operators between 16/1 and 23/1

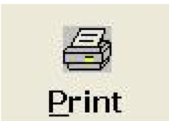


- Highlight the transaction you want to view in more detail
- Select

The transaction detail will be shown

To Print a Copy Receipt

- Select



To exit from the detail view

- Select

To Print an A4 copy of the receipt

- Select

To void the transaction

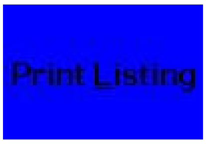
- Select

	Voiding the Transaction will remove it from the database – this functionality may be disabled

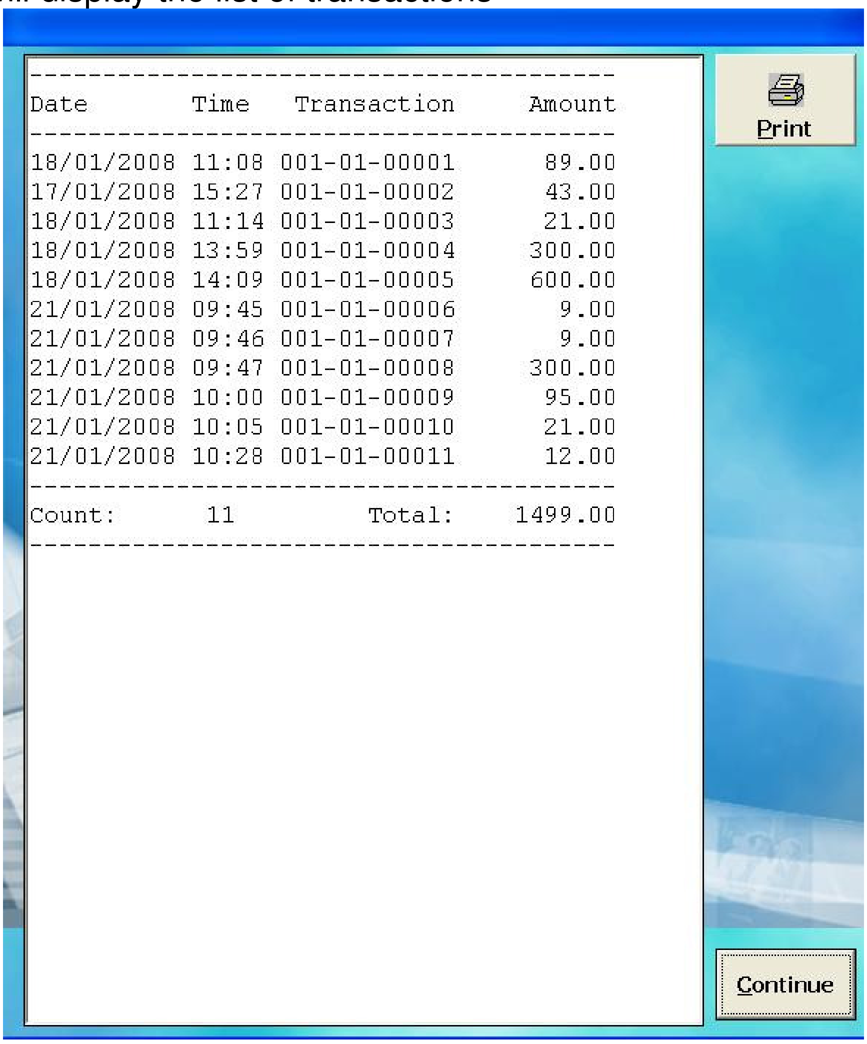
To Print the Search result List from the Receipt Printer

From the Search Result Screen

- Select

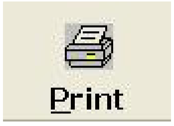


This will display the list of transactions



To print this

- Select



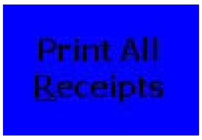
The continue button will exit back to the results screen

To Print a Copy Of a Selection Of Receipts

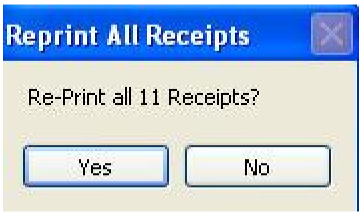
☝	These will print from the receipt printer

From the search results page

- Select



You will be asked to confirm that you want to print all of the receipts



If you do Press Yes if not Press No

To Export to HTML

- Select

To Export to Excel:

- Select

To Change the Current Criteria:

- Select

Serial Tracking

Serial tracking is used to log details of products sold and to whom e.g. serial numbers of guns

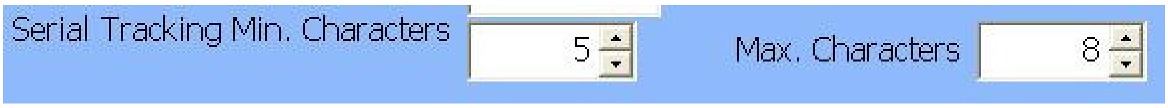
Set up a product for serial tracking

In the product record on the 'Profile' and 'Options' tab

- Tick

On the 'Settings' tab

- Set the minimum and maximum number of characters the serial number can have

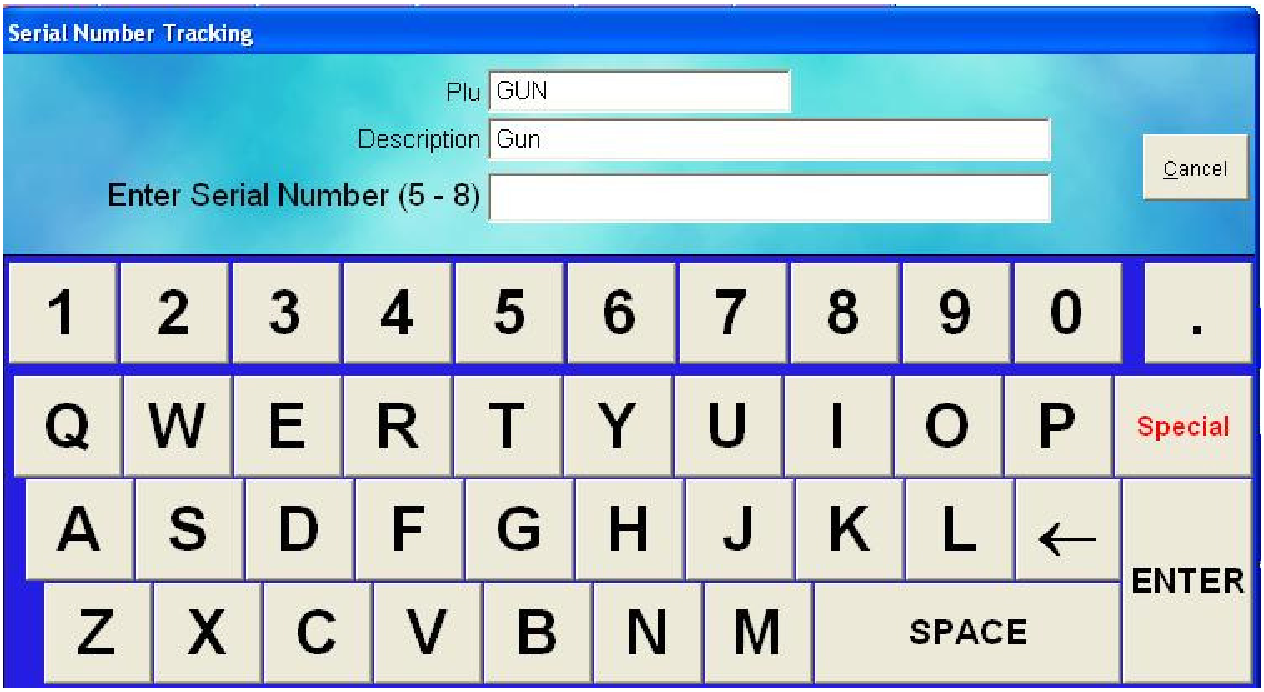


Selling a Product with serial tracking

On the terminal

- Select the product to be sold

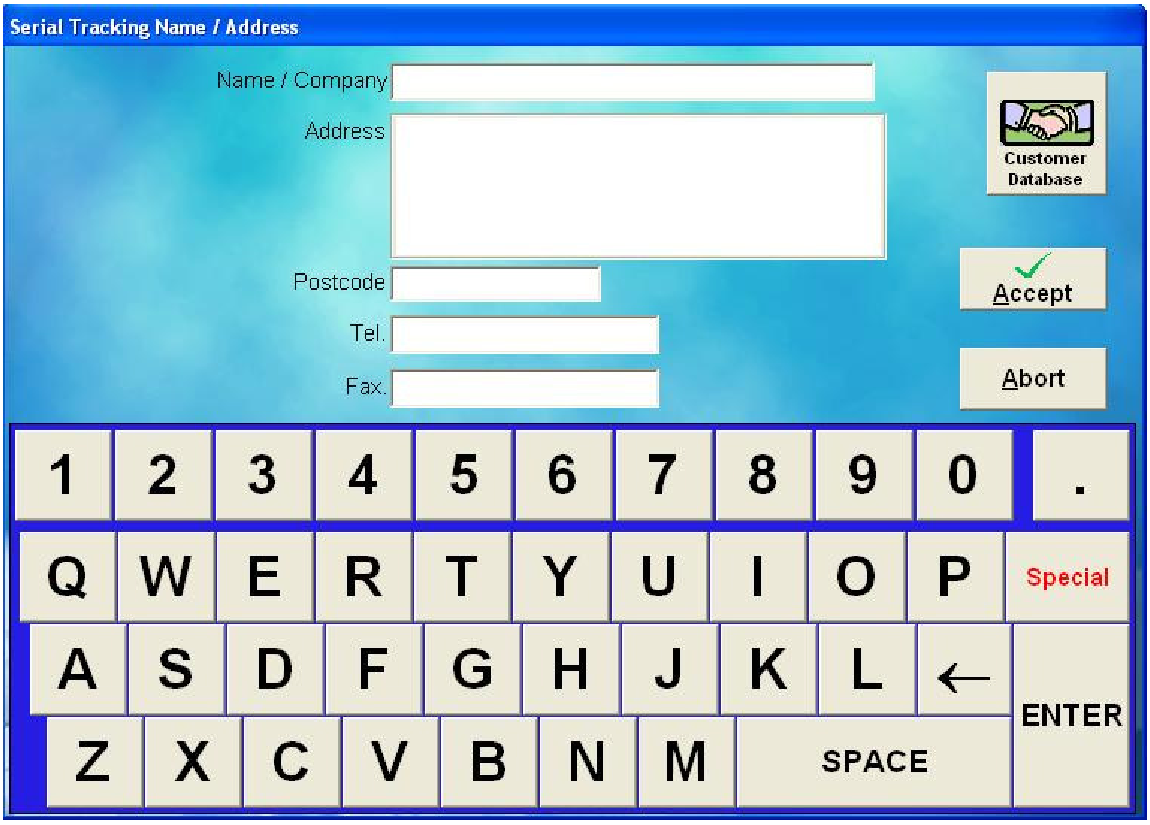
The serial tracking number screen is shown



- Enter the serial number using the keyboard on the screen
- Select the Enter key

☝	If the reason menus are switched on you will see a reason screen – select the appropriate reason – to add a new reason see the 'Reasons' section of the manual

When the Sub total button is pressed you will be asked for the customer details so they can be stored in the database



- Enter the customer details

	If the customer already exists in the database you can use the 'Customer Database' button to find the customer

- Select the Accept button and the data will be stored

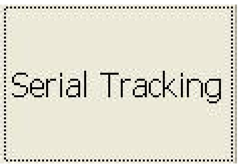
Once the transaction has been completed you can look up the information by using 'Serial Tracking'

Looking up Serial Tracking transactions

From the Back Office

- Select

- Select



The serial tracking screen is displayed

By default all transactions are displayed but you can narrow down the list by date range, sort by date, name, PLU, description, serial number and receipt number or use the open search for a specific transaction

Mail Merge Wizard

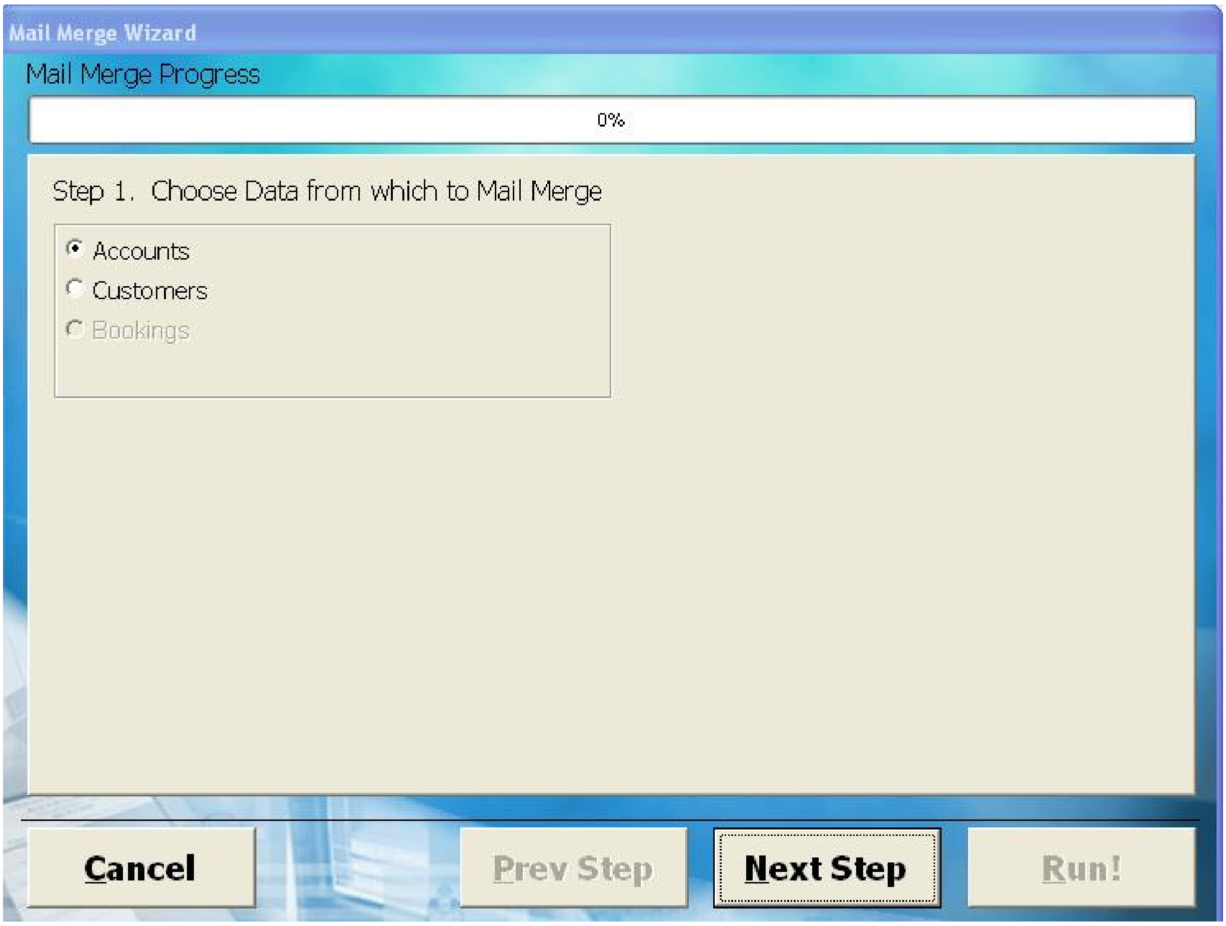
Mail merge wizard is a tool to export data held in the Account and / or Customer database to a csv file.

To Export Data

- Select

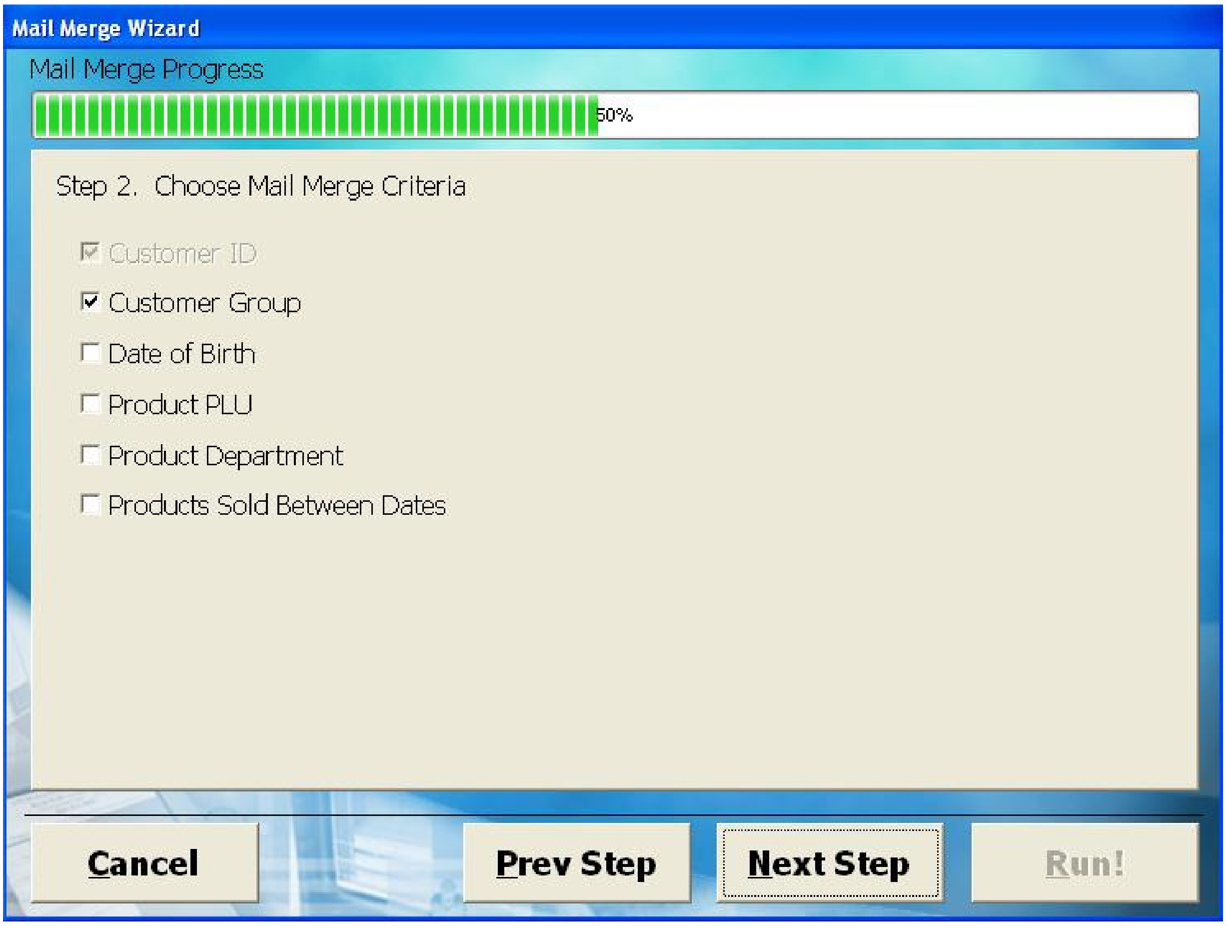
- Select

The mail merge wizard Step 1 page is opened



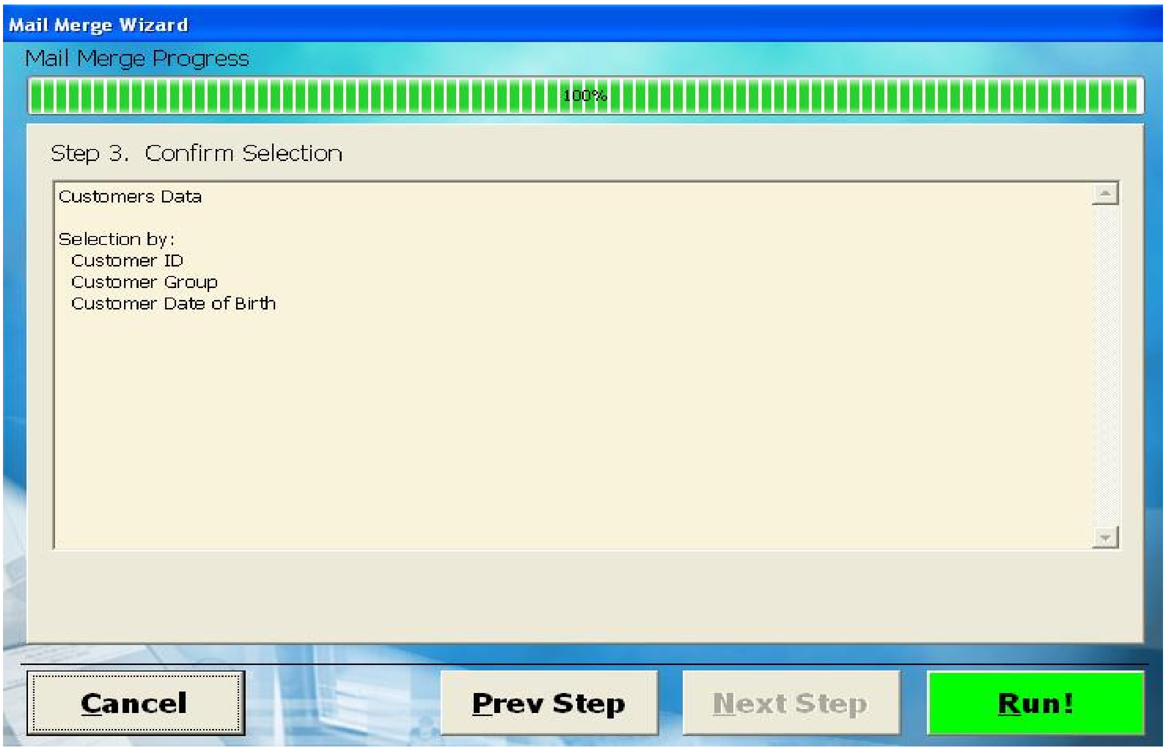
- Select the data group you want to capture the data from
- Select Next Step

Step 2 is displayed



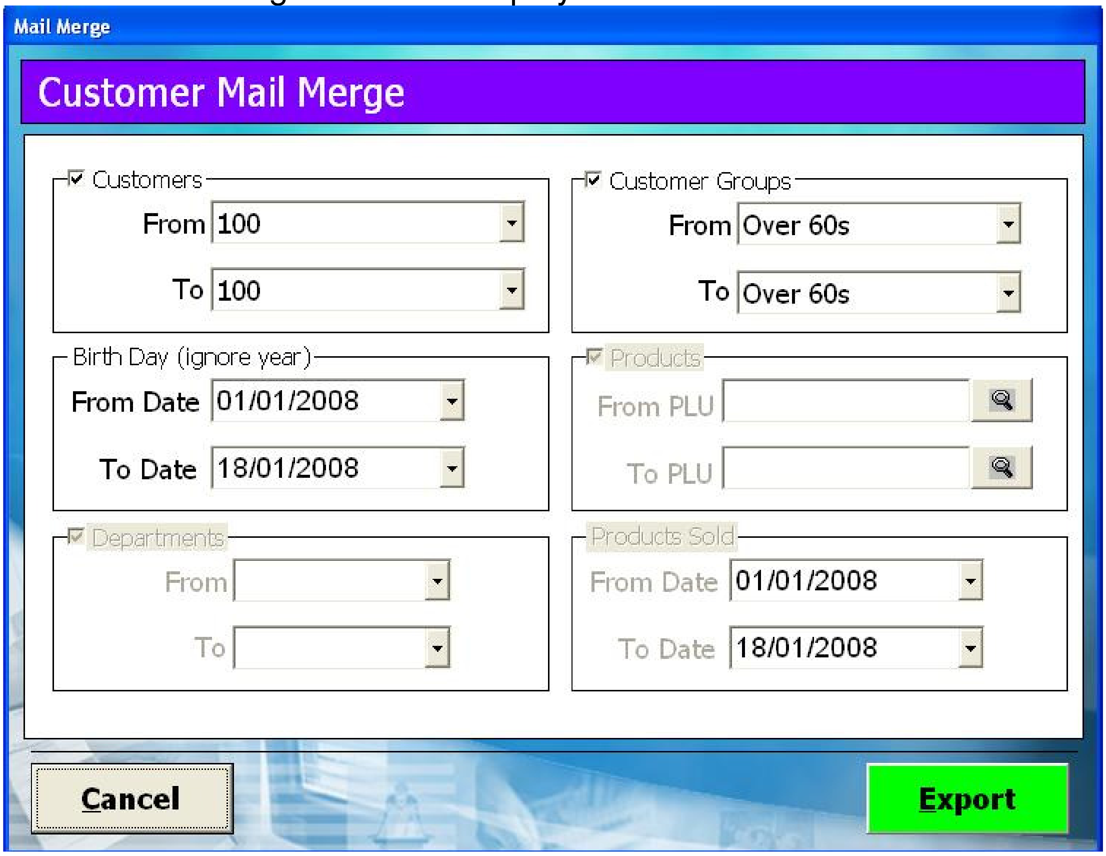
- Tick the selection criteria you want to chose from
- Select Next Step

The mail merge confirmation selection screen is displayed



- Select

The Customer mail merge screen is displayed



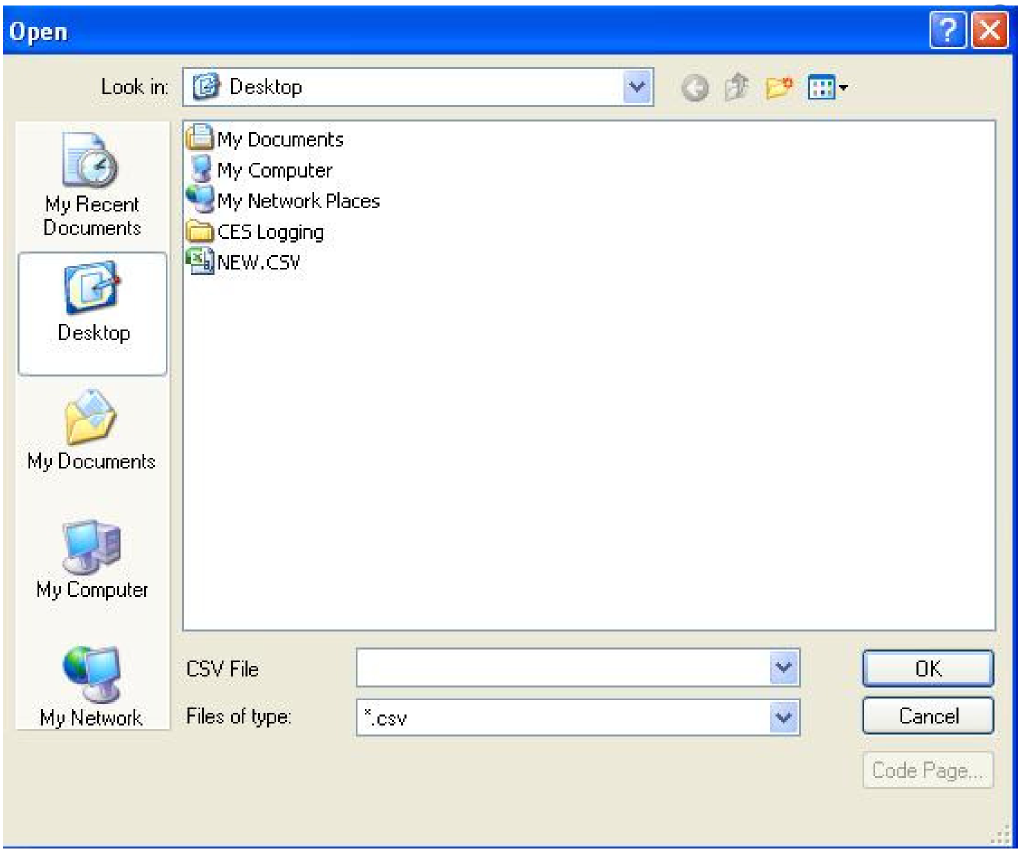
The search criteria you selected will be available

- Narrow down your customer criteria if relevant
- Select

A message will appear advising the number of records found matching the criteria

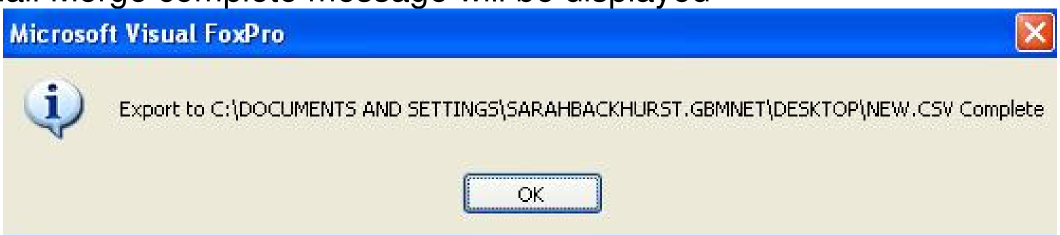
- If you want to proceed with the export press Yes, if not press no

If Yes is selected the following screen is displayed



- Select the path you wish to save the document to
- Enter the name of the document
- Select OK

The Mail Merge complete message will be displayed



- Select OK

The document can now be found in the location you chose to save it in

Commission

This is a feature that enables ‘Users’ to earn commission on sales made. Commission is set against a user in ‘bands’, these bands are set in £

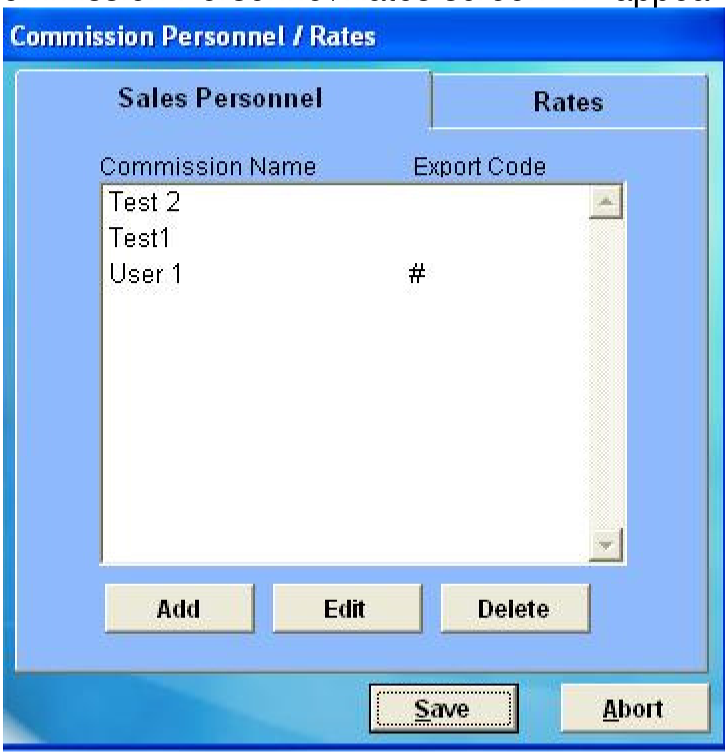
	There are a maximum of 10 bands that can be set

Setting Up Personnel

- Select

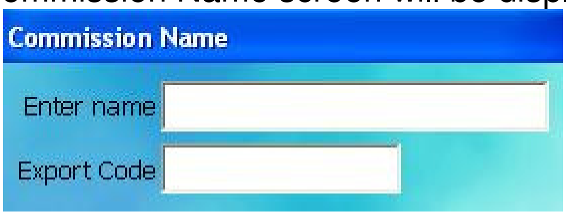
- Select

The Commission Personnel/Rates screen will appear



- Select

The Commission Name screen will be displayed



- Enter the name of the user

- Press Enter twice

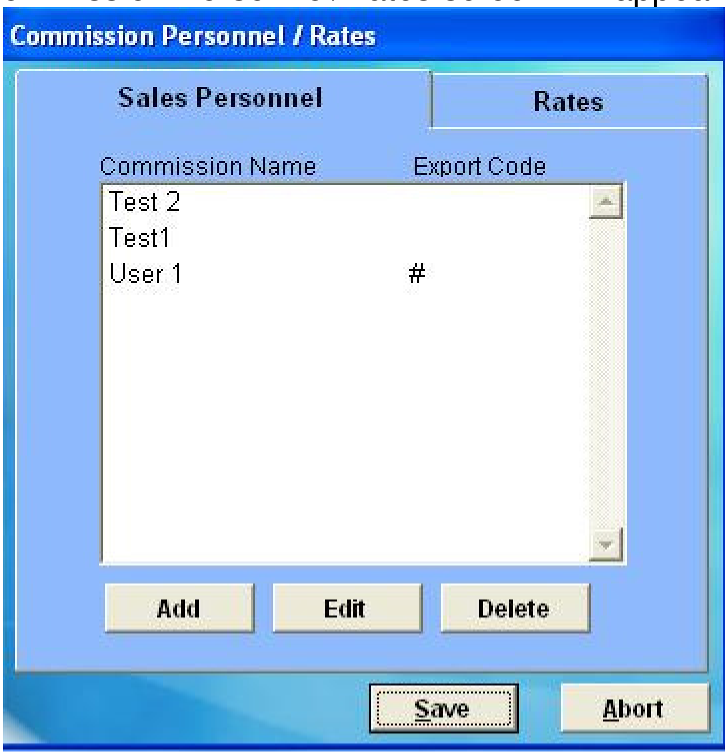
The name of the user will be added to the list

Deleting Personnel

- Select

- Select

The Commission Personnel/Rates screen will appear



- Highlight the name of the user you want to delete by clicking on it
- Select

Editing Personnel

- Select

- Select

The Commission Personnel/Rates screen will appear

- Highlight the name of the user you want to edit by clicking on it
- Select

The Commission Name screen is displayed

- Edit the required information
- Press Enter

Saving Changes

To save any additions or any changes made from the Commission/Personnel Rates screen

- Select

If you do not want to save the changes made

- Select

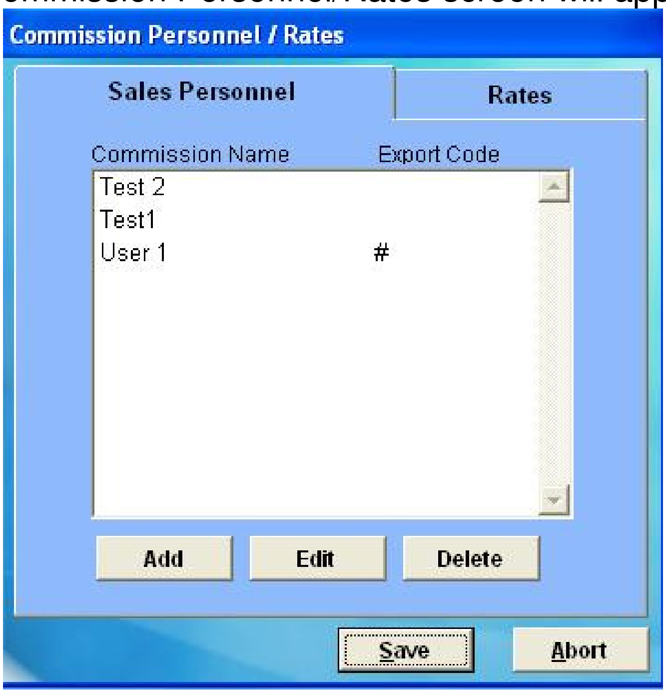
Setting Up Rates

	Rates are set for all personnel and all sales you cannot set up a rate for a particular product or user

- Select

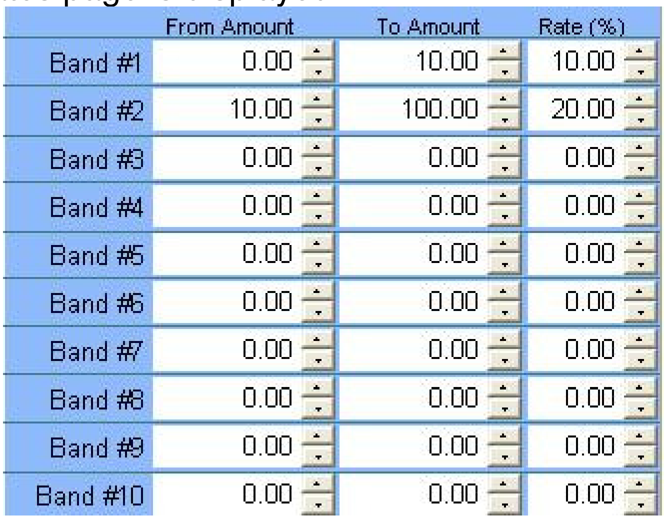
- Select

The Commission Personnel/Rates screen will appear



- Select

The rates page is displayed



	From Amount	To Amount	Rate (%)
Band #1	0.00	10.00	10.00
Band #2	10.00	100.00	20.00
Band #3	0.00	0.00	0.00
Band #4	0.00	0.00	0.00
Band #5	0.00	0.00	0.00
Band #6	0.00	0.00	0.00
Band #7	0.00	0.00	0.00
Band #8	0.00	0.00	0.00
Band #9	0.00	0.00	0.00
Band #10	0.00	0.00	0.00

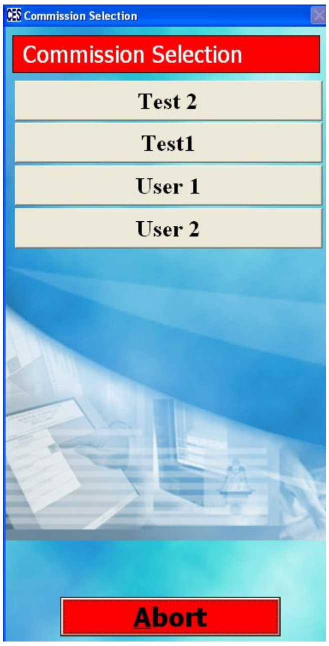
- Enter in the band numbers the amounts and commission rates you want to implement

In this example a sale up to £10.00 will attract 10% and between £10.00 and £100.00 attracts 20%

Selling with Commission Set

- Select the products to be sold
- Select

The Commission Selection screen is displayed



- Select the Person the commission is to be attributed to

In Reports and Current Sales you can view the Sales Commission Report

```
         Current
  Commission Report
     21/01/2008 10:00

Branch: 001              Terminal: 01
========================================
Name
Band  Rate   Count      Sales Commission
========================================
User 1
 1>  10.00%      1       9.00       0.90
----------------------------------------
                 1       9.00       0.90
----------------------------------------

User 2
 2>  20.00%      1      95.00      19.00
----------------------------------------
                 1      95.00      19.00
----------------------------------------

========================================
Total:           2     104.00      19.90
========================================
```

For a summary of this Report please see the Reports section

Clock In/Out

This is a feature that enables Staff hours to be tracked; the staff member should ‘clock in’ at the beginning of their shift and ‘clock out’ at the end of their shift.

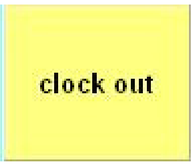
To Clock In

- Log on to the POS
- Select

This will register the Operator and the time the clock in function was selected; this is the start of their shift

To Clock Out

- Select



This will register the operator and the time the clock out function was selected; this is the end of their shift

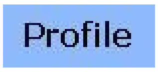
In crystal reports you can run an operator hours report which shows the clock in/out times and the hours and minutes worked

Labels

There are two ways of printing shelf edge or product labels (barcodes) either from the product record (single product) or from database (multiple products).

Printing from the Product Record

- Select



- Select

In the Labels section

- Select the button for the type of label required

or


Once you have selected the type of label you want to print the following screen will be shown

Or

The PLU and Description is carried through from the product record so this is the information that will print on the labels

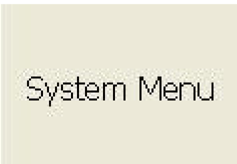
- Select the Quantity of labels required

Printing from the Database

This is for printing labels for a whole department

- Select

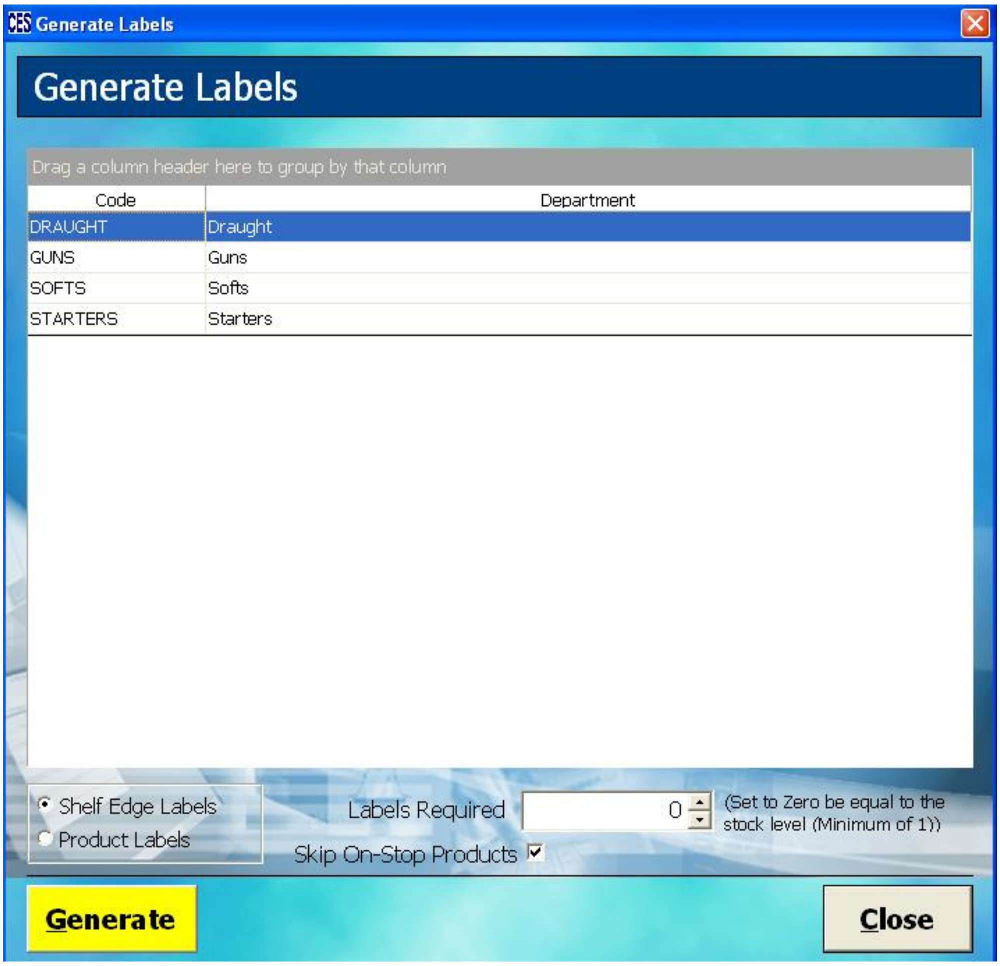
- Select



- Select

- Select

The generate labels screen will be shown



- Click on the Department you want to print labels for
- Select the type of label you want to print

- Select the number of labels required

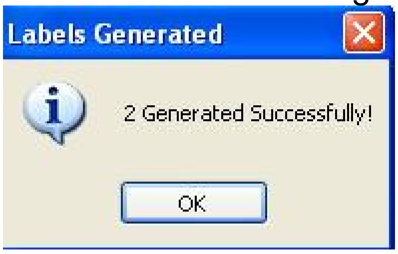
- If you do not want labels for products marked as ‘on-stop’ tick the box

- Select

The following message will be displayed

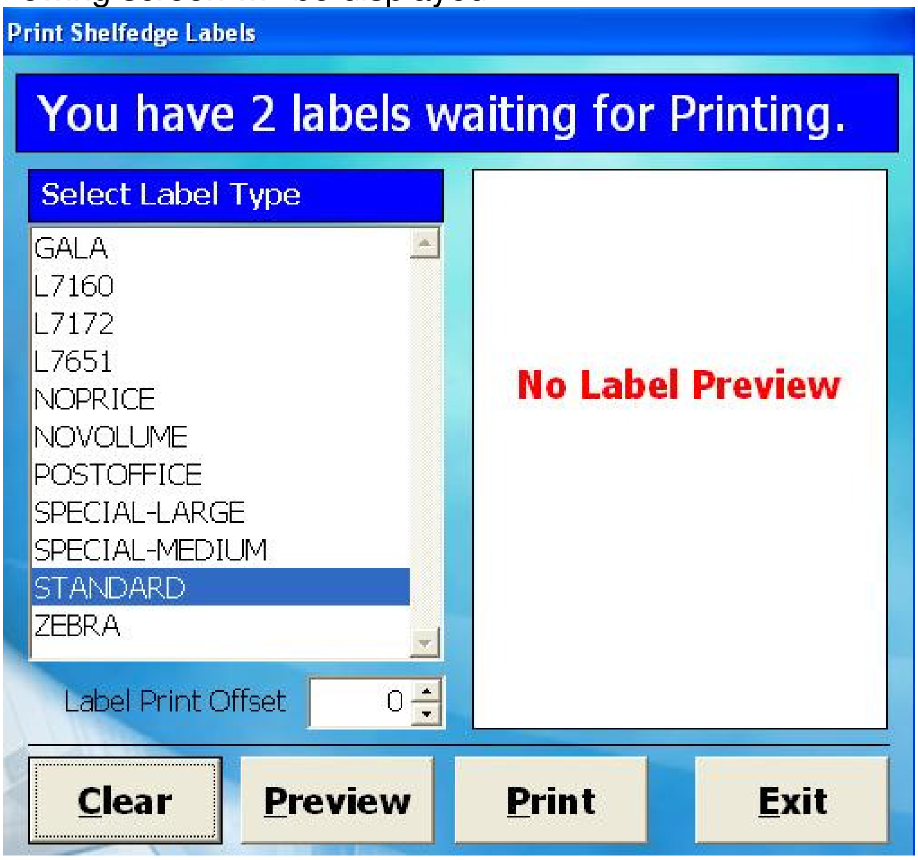
If correct Press Yes

You will then see the following



Once you have selected all of your departments and number of labels select

The following screen will be displayed



- Select the label type from the list on the left
- To preview the labels select Preview
- To Print the labels select Print

Exit and Clear will take you back to the Database options screen

Credit Notes

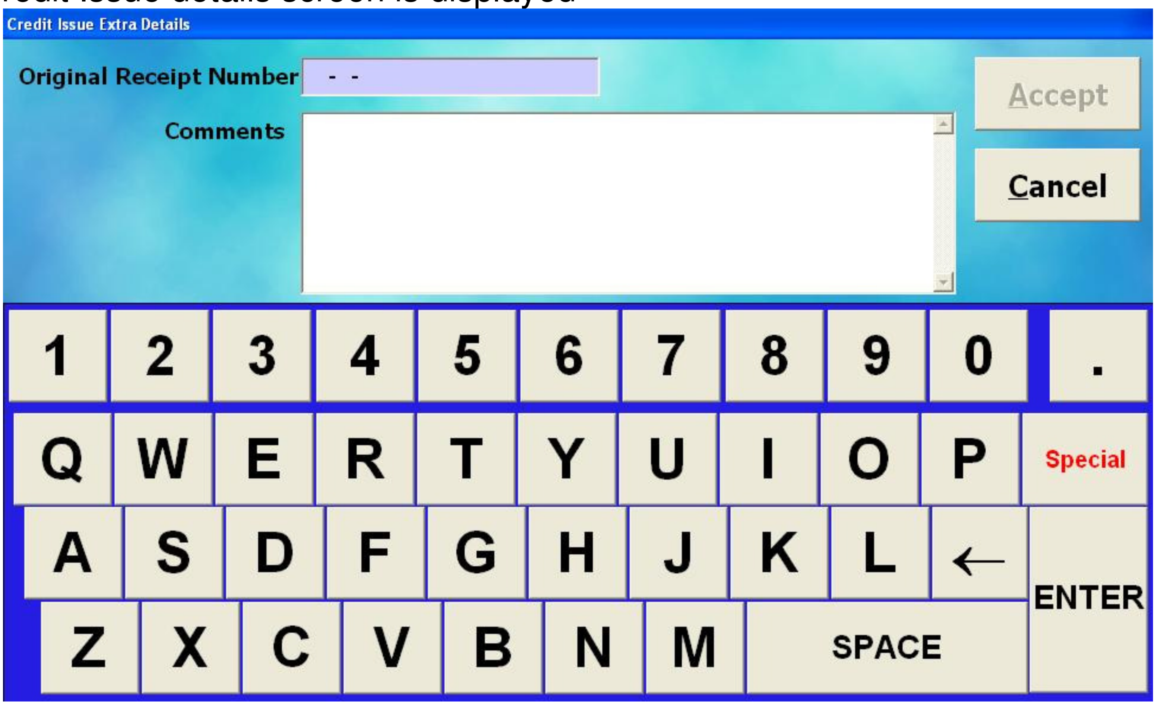
Credit Notes are a form of refund by effectively putting the person in ‘credit’ and issuing a receipt for the credit amount

Issuing a Credit Note

- Refund the items that you wish to issue a credit note for
- Select

- Select

The Credit Issue details screen is displayed



- Enter the original receipt number
- Enter Comments as required
- Select

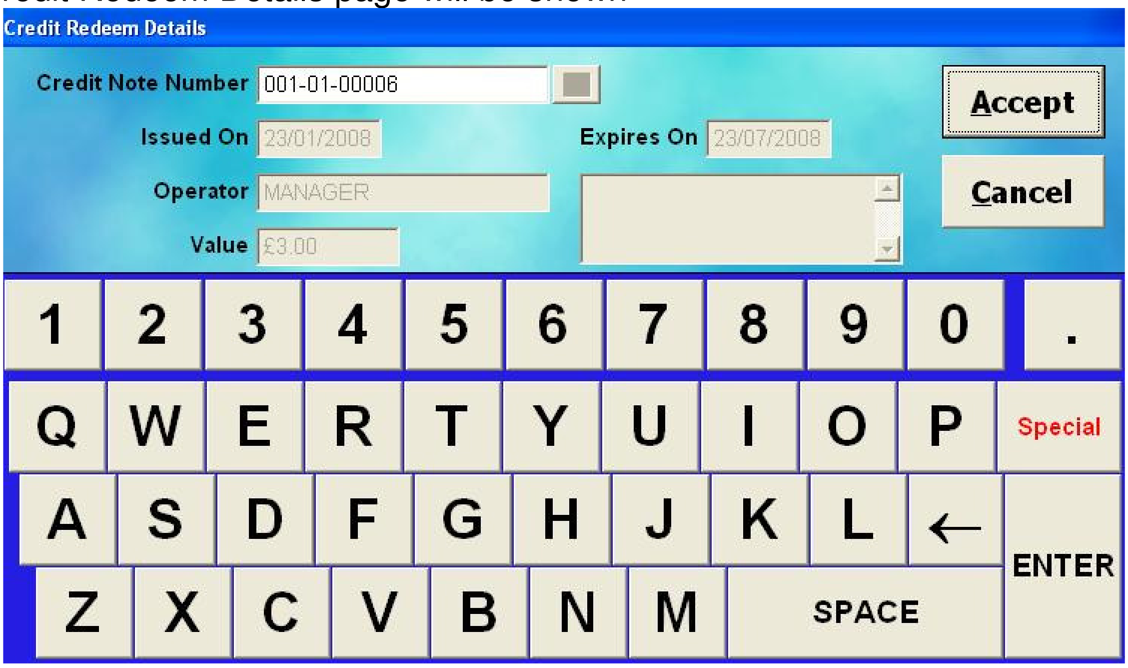
- Complete the transaction

Using/Redeeming a Credit Note

- Ring through the items on the transaction
- Select

- Select

The Credit Redeem Details page will be shown



- Enter the Credit Note Number

	The credit note number can be found on the credit note issue receipt or you can use the  as a search function, make sure you verify the details of the note you are redeeming

- Select

- Complete the transaction

	A credit note can be used as a Part Payment

Stock In/Out

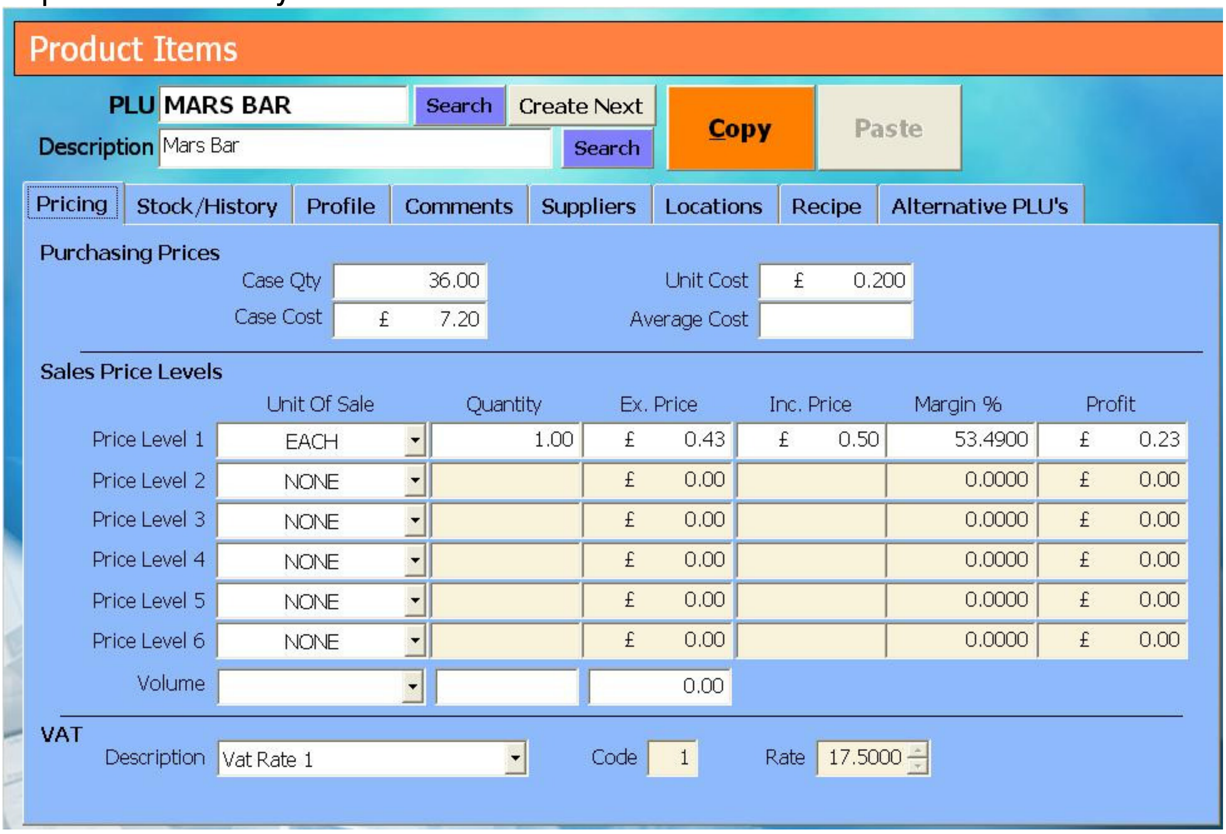
To use the stock facility the products/PLUs must be set up, this manual assumes the product exists in the database and units of sale have been created. You can enter the stock details when creating the item; the process does not have to be done separately.

Setting up a Stock item

- Select

- Select

Find the product record you want to set as a stock item



- In the Case QTY enter the number of sale units in the case you purchase *e.g.in a box of 36 Mars Bars there are 36 items, in a 70cl bottle of Vodka selling at 25ml shots there are 28*
- In the case cost enter the cost price of the case

The Unit cost will be calculated automatically

- In the Quantity field for each unit of sale and price level you have set up; enter the number taken from stock each time one is sold *e.g. if I have a unit of sale called double for vodka the quantity out of stock would be 2*
- In the Inc.Price field enter the price you sell the product for (if it is not already there)

The Profit, Margin and Ex.Price will be worked out automatically

☝	Make sure you have the correct VAT Rate applied

☝	Remember once you have set up your item for stock when you sell it will start deducting from stock levels and the system will allow you to run in a negative stock so you will need to do a count to ensure your figures are accurate

To set up a recipe item

A recipe item is used when selling a product that is made up of more than 1 item *e.g. Lager Shandy* so the Stock takes are accurate we must tell the system how much Lager and how much Lemonade is in the product.

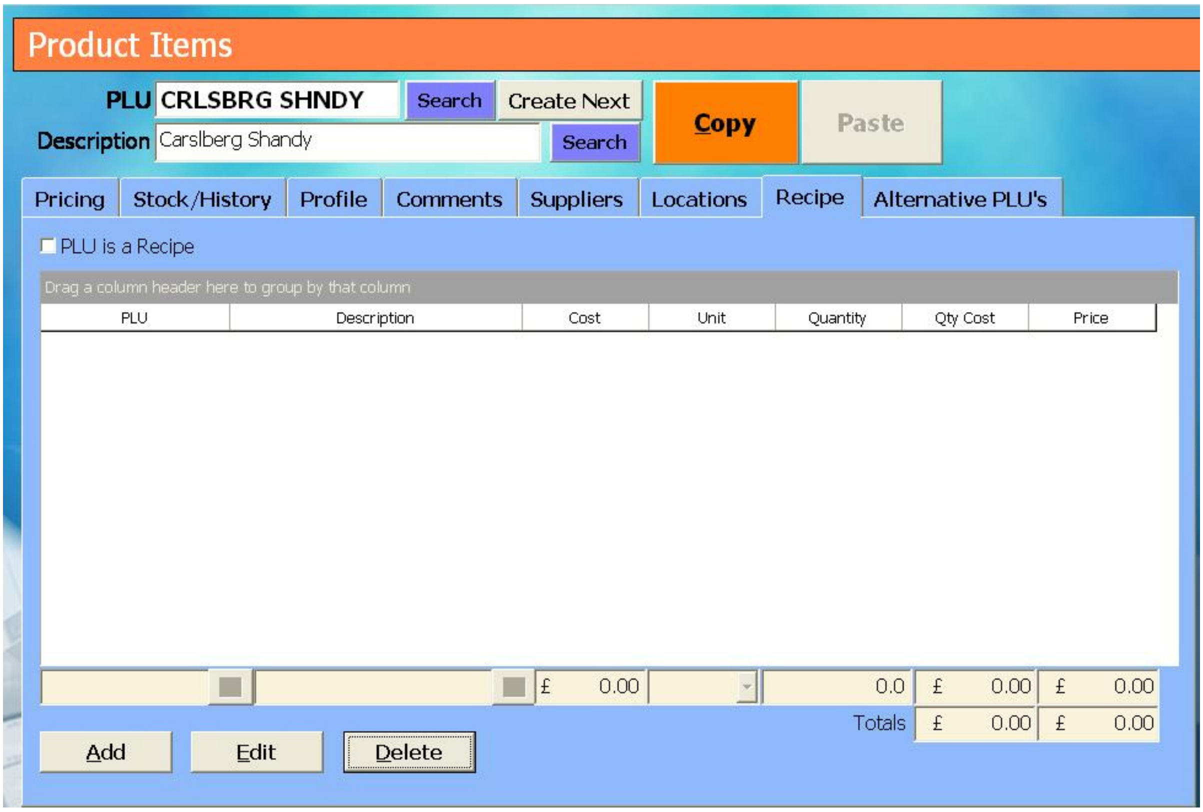
- You must have your products Lager and Lemonade set up as above
- Add Carlsberg Shandy as a PLU
- Select

- Select

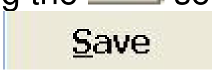
- Tick

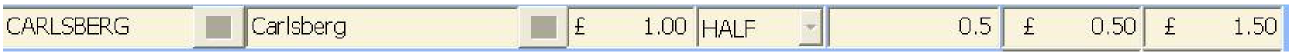
- Select

The recipe page is displayed



- Select

This enables the product selection box using the  select the first product you want to add as part of the recipe and press 

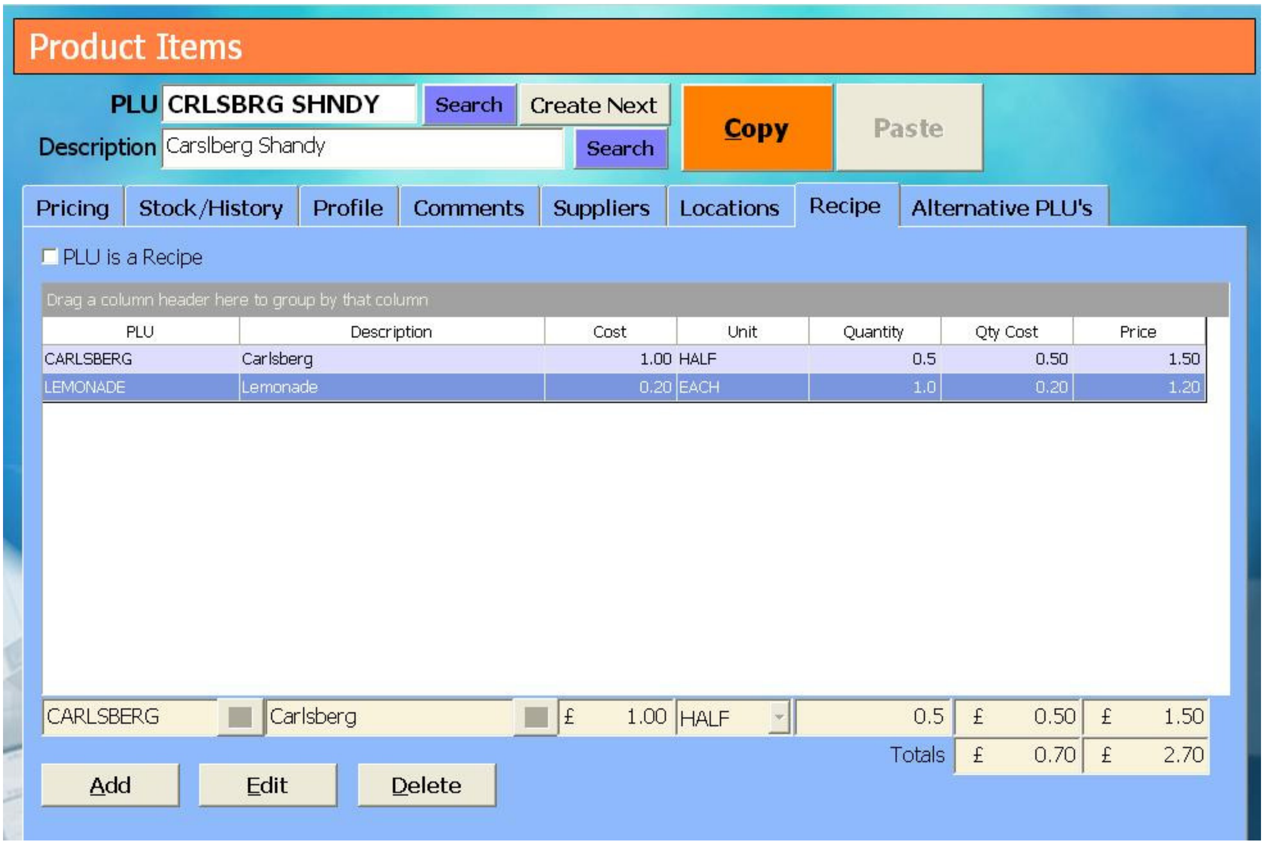


In this example I have told the system I am taking Half of Carlsberg from stock – it has calculated the cost

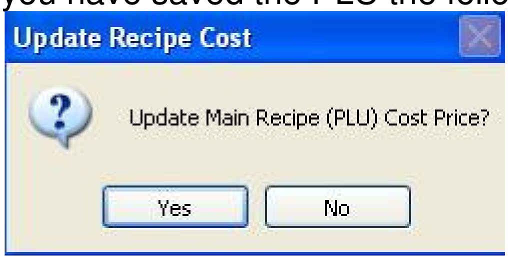
- Select

Find the second product you want to add, repeat this process until all constituent items have been added

☝	If you cannot select the size you want to add to the recipe it is because it is not priced in the sales price levels section of the product record



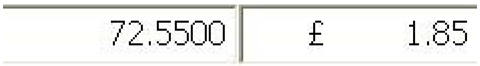
Once you have saved the PLU the following message will be displayed



- Select Yes

☝	Updating the main recipe cost price means that the system will work out the cost price based on the items and quantities you have added to the recipe item

The Margin and Profit fields on the front of the product record will be updated

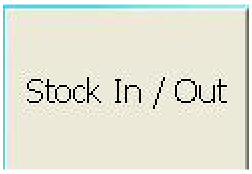


Stock Orders

Stock orders can be used to record incoming stock which has not yet been received/orders placed with suppliers. This is not a mandatory part of the Stock In process as ‘Goods In’ can be created as deliveries are received. These orders can be faxed or sent electronically to Suppliers in some cases.

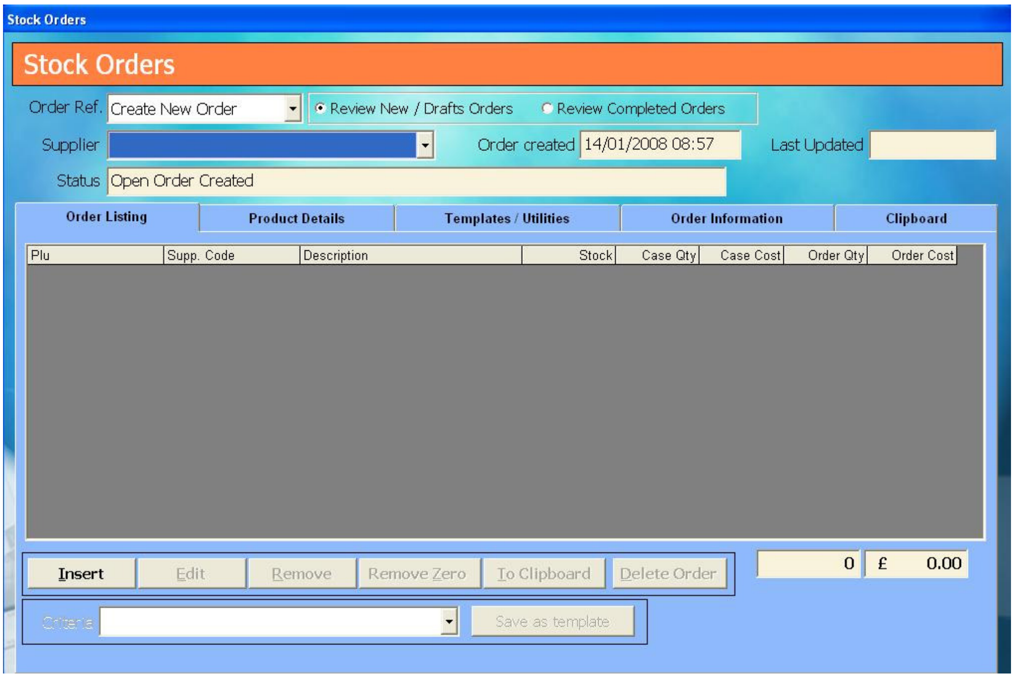
To create a new Order manually

- Select



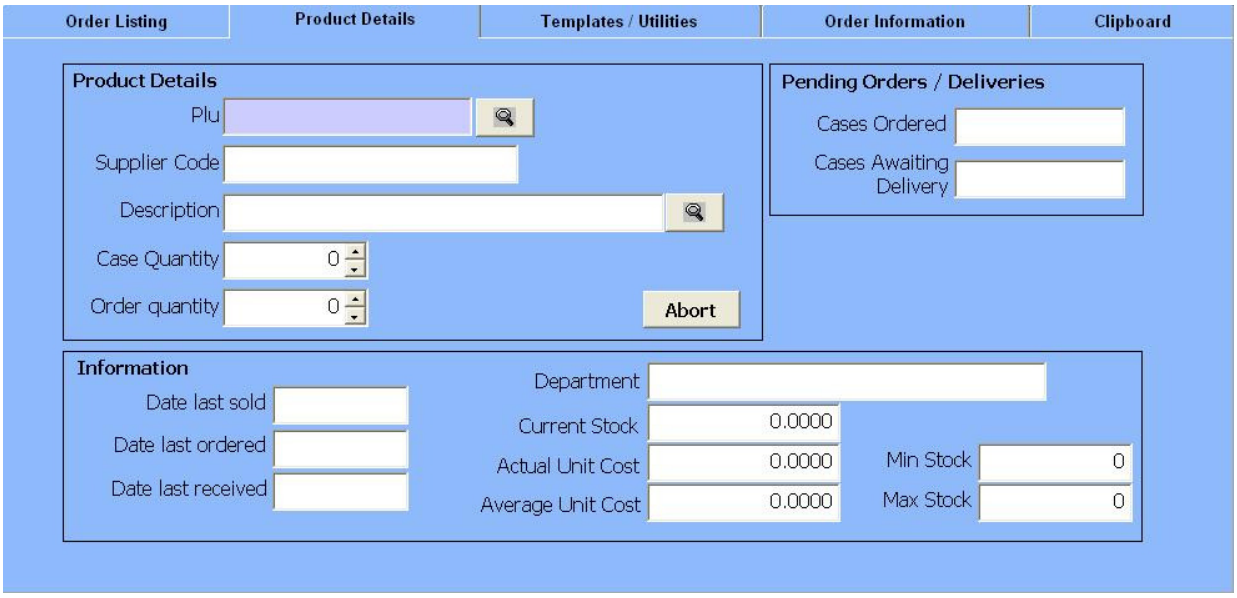
- Select

A blank Stock Orders screen is displayed

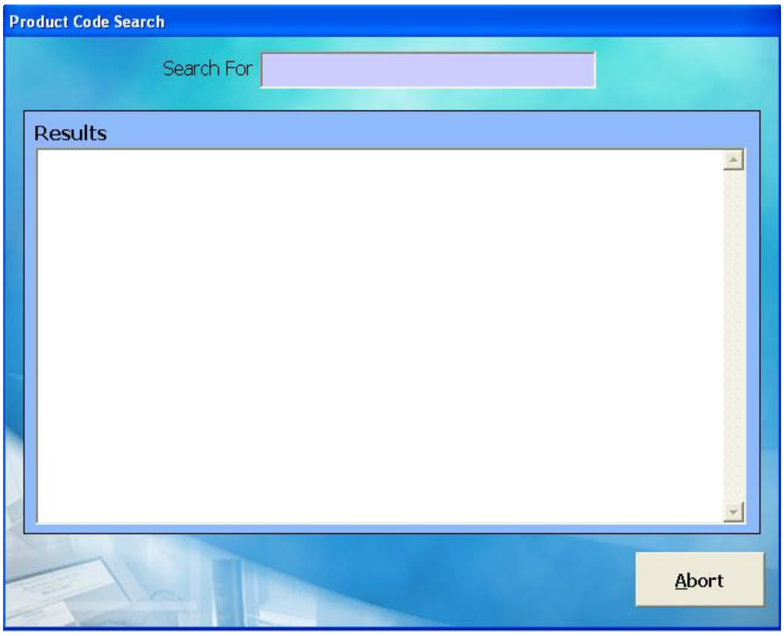


- From the drop down box in the ‘Order Ref’ field select ‘Create New Order’
- From the ‘Supplier’ drop down box select the supplier you are ordering the products from
- Select

A new screen will appear



- In the PLU field enter the PLU field of the first product you want to add to the list and enter, if you do not know the full PLU press the  and the product search box will appear

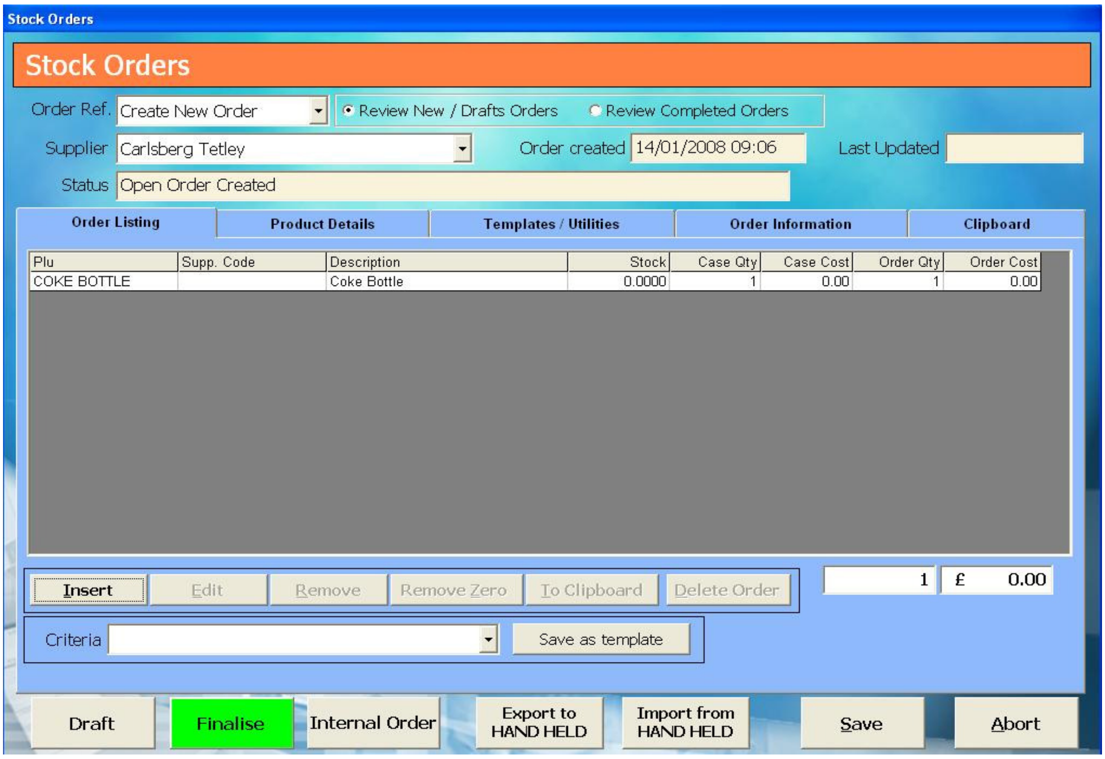


- In the Search for field enter a minimum of 1 character of the product you are searching for the search will find any product with that character in *e.g. if you enter 'o' as the search it will find 'Orange', 'Fosters' and 'Coke Bottle' as they all contain the letter 'o'*. Select 'Accept' to confirm the product

☝	You can also use the Supplier Code to find the item you are looking for

- Enter the number of cases you want to order in the 'Order Quantity' field
- Select

The product is displayed on the Order page with the quantity and cost



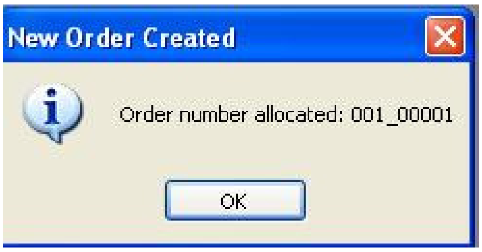
☝	If the cost is 0.00 there is no cost price set against the product record

If you want to keep this as an Open Order that can be added to and quantities changed select

- Once all products and Quantities for this supplier are added and the order is complete select

☝	Once the Finalised option is selected the order figure is updated and in the product record the order amount will be increased

The Order Number Allocation message will appear



- Select OK

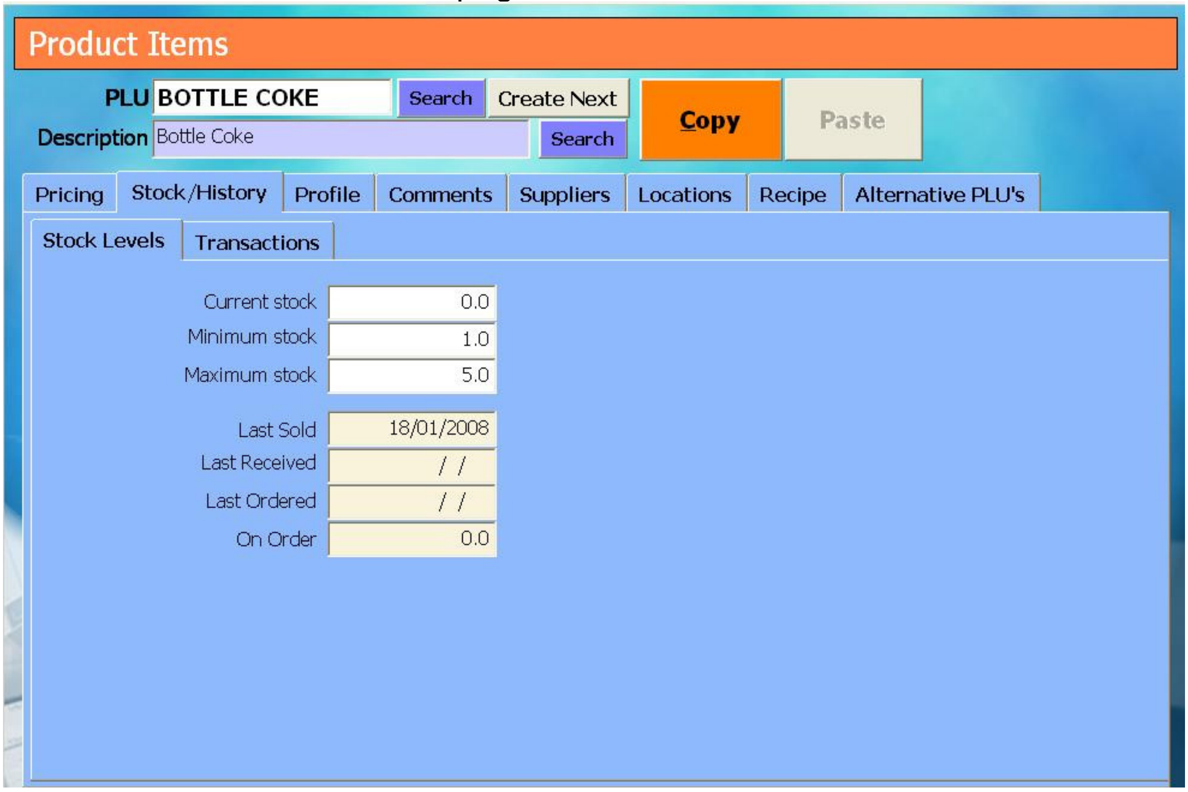
Setting a Product to use min and max criteria

Minimum and Maximum are levels set in the system for reordering purposes *e.g. if my min level is 5 and my max level is 10 and I have 7 in stock my reorder figure will be 3*

Find the product record of the product you want to set min and max levels for

- Select Stock/History

This will default to the Stock Levels page



- In the minimum Stock field enter the minimum stock holding you want for this product
- In the maximum stock field enter the maximum stock holding you want for this product

☝	The Quantities are based on UNITS not CASES

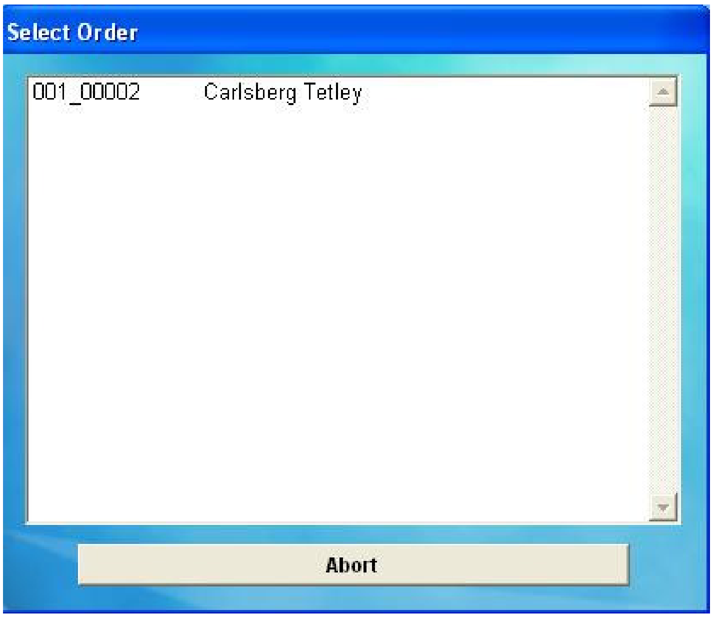
To Book an Order into Stock

- Select

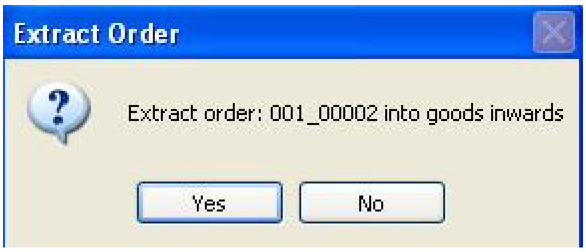
- Select

	The order will not appear in the Select Orders list until it has been ‘Finalised’

The Select Orders screen will appear



- Highlight the Order from the list
- Confirm that you wish to extract the Order to Goods Inwards

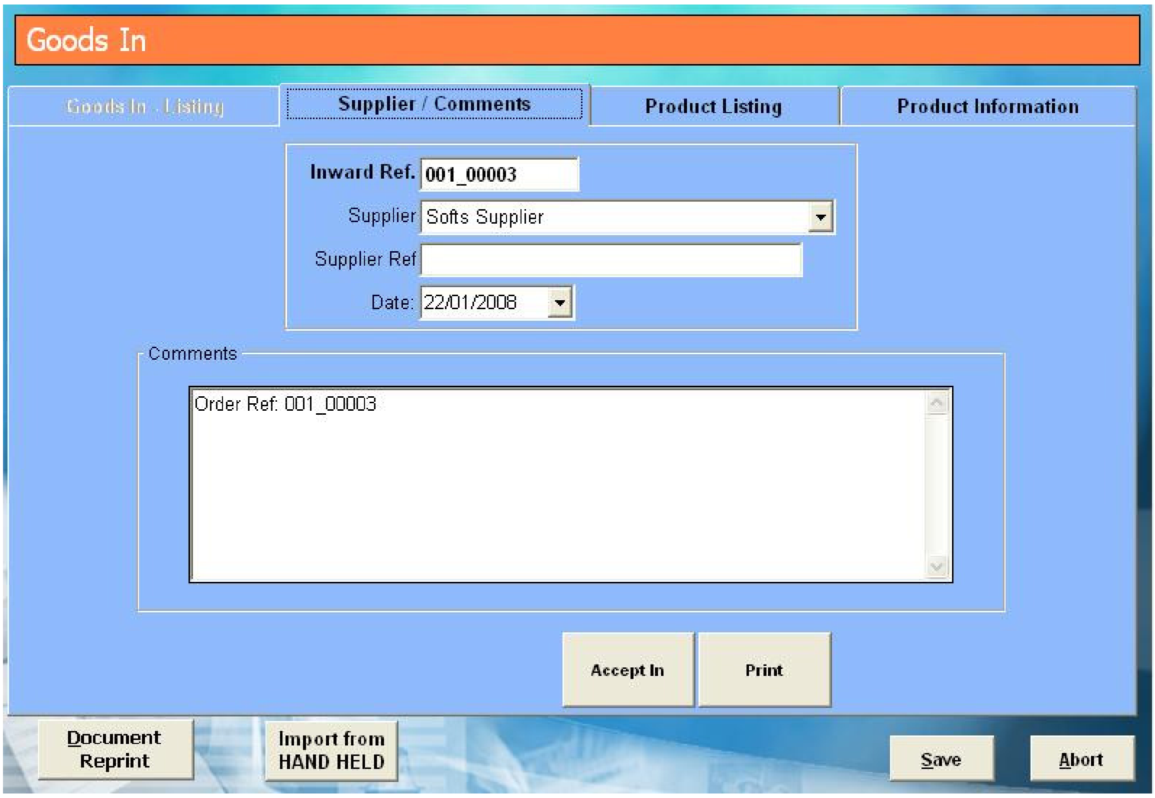


- Confirm that you wish to extract the Order to Goods Inwards

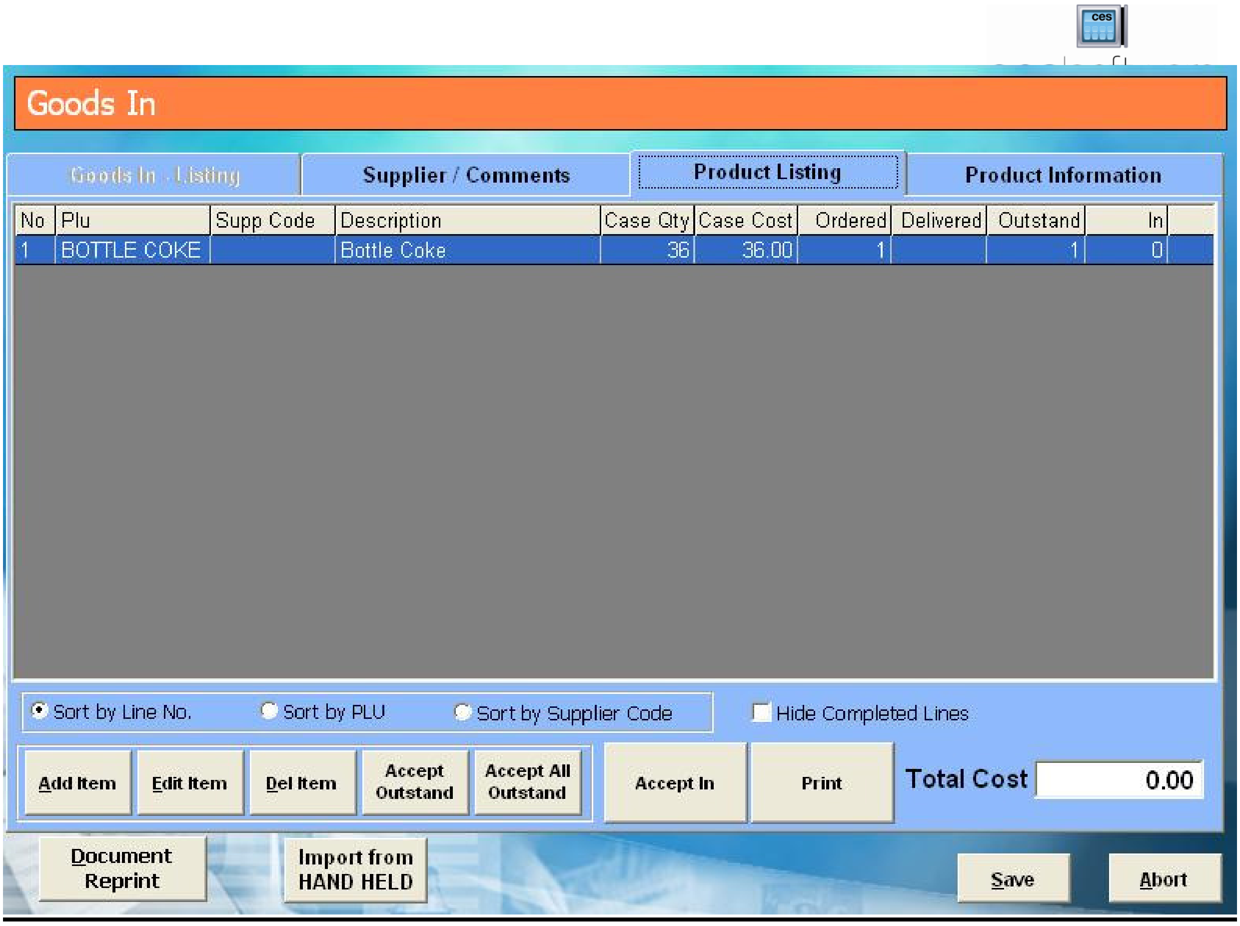
The Goods in Number allocation message is shown

- Select OK to confirm the number

The Goods In screen is displayed



- Enter the Supplier Reference number in the field if required
- Select the Product Listing tab

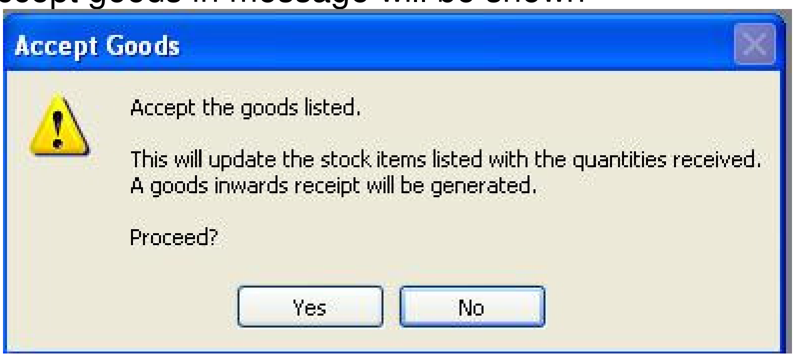


If the delivery was correct:

- Select

- Select

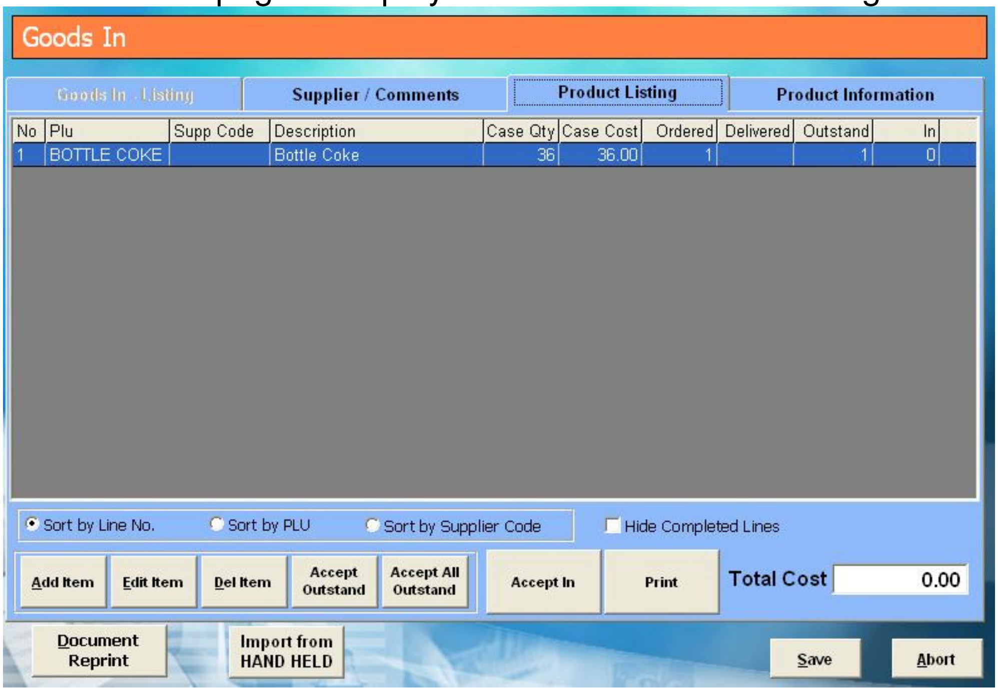
The accept goods in message will be shown



If the product and amounts were received say Yes, if not say No, assuming you select Yes, you will be asked if you want to print a goods in document

The Goods in page will be displayed again but the Order you have just booked in will not be there

If the delivery Qty or Cost was incorrect:
When the Goods In page is displayed select the Product Listing tab



- Double click the product which was not delivered correctly

From here you can change
- The Case Qty In = number of cases delivered
- Case Qty = if the case size was different from the standard
- Case Cost = if the case cost is more or less than in the product record

Once you have made the required changes
- Select

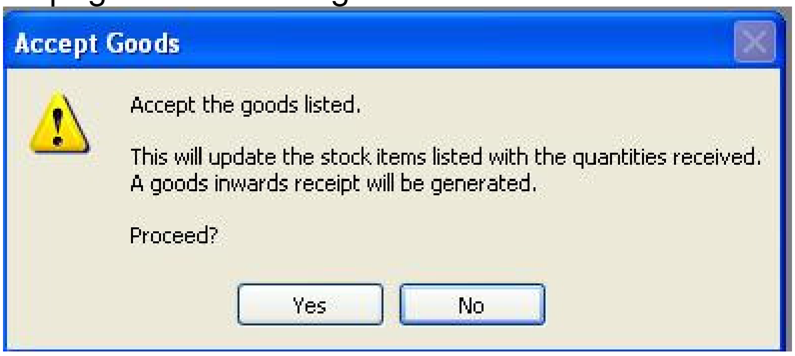
The product listing page is displayed with the changes reflected

If you do not want to save the changes made

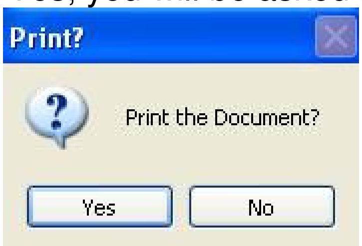
- Select

- Select

The accept goods in message will be shown



If the product and amounts were received say Yes, if not say No, assuming you select Yes, you will be asked if you want to print a goods in document



The Goods in page will be displayed again but the Order you have just booked in will not be there

Deleting an Item

From the Product Listing page highlight the product to be deleted

- Select

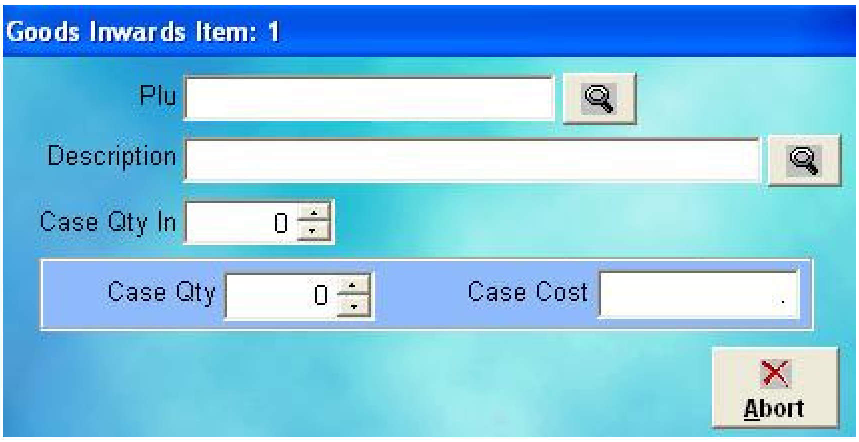
The product will be deleted from the order

Adding an Item

From the Product Listing page

- Select

The following search box is displayed



Use the PLU or Description field to search for the product you want to add to the delivery, once the product has been selected the Case Qty and Case Cost will be read through from the product record

- In the Case Qty In field select the number of cases delivered
- Select

ERROR: stackunderflow
OFFENDING COMMAND: ~

STACK: