Portal User Guide

Restaurants and Home delivery

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Managing table service and home delivery

You can create an manage tables in sections and groups to run a dine-in, takeaway or cafe service through the Portal. You can also manage customer home delivery options.

Menus can be defined and meals added via Item Maintenance.

For more information on defining menus and item options, see *Managing item options and modifiers* on page 82.

See:

- *Table Booking Maintenance screen* on page 53.
- *Group Maintenance screen* on page 15.
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- *Table Menu Maintenance screen* on page 93.
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Home delivery:

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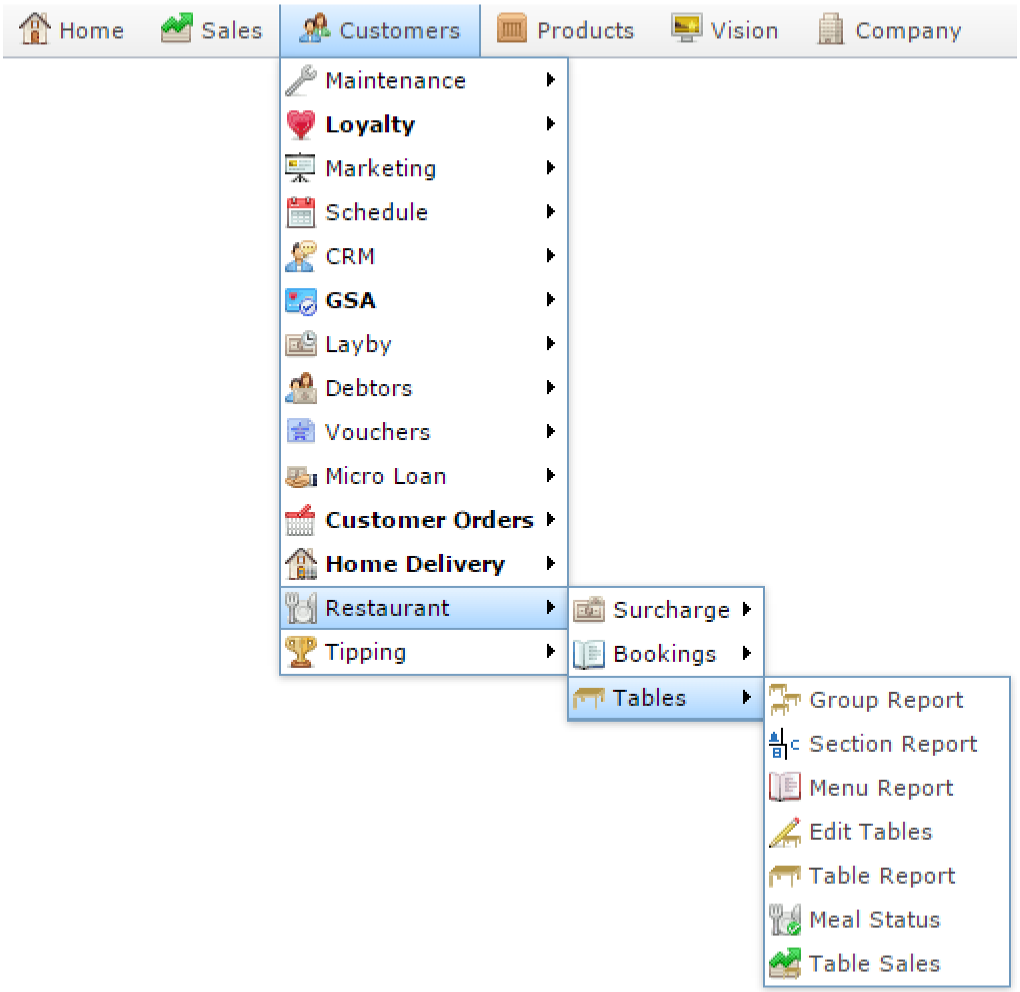
- *Customer Order report* on page 78.

Creating a table group

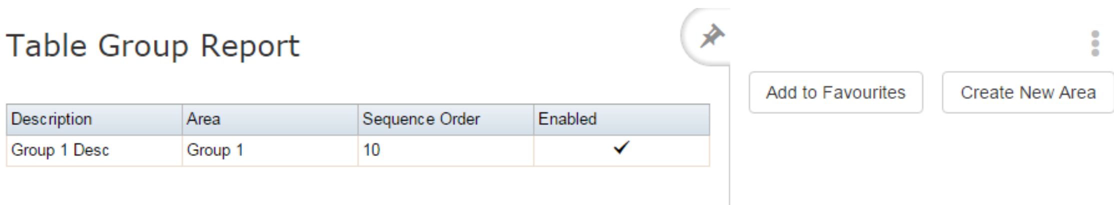
Create a group to control how menu areas and menu items are available to certain tables.

To create a group:

1. Press  .
2. Press **Restaurant** > **Tables** > **Group Report**.

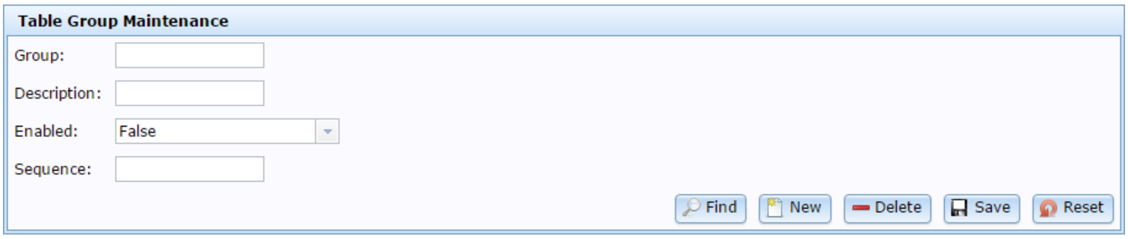


The Table Group report is displayed.



3. Press Create New Area.

   The Table Group Maintenance screen is displayed.

   See *Group Maintenance screen* on page 15.

4. Type a unique code to identify the group in the **Group** field.
5. Type a description of the group in the **Description** field.
6. Type the order number you want for the group in the **Sequence** field.

   Lower numbers appear earlier in lists and PDT screens.

7. Press Save.

   The group is created.

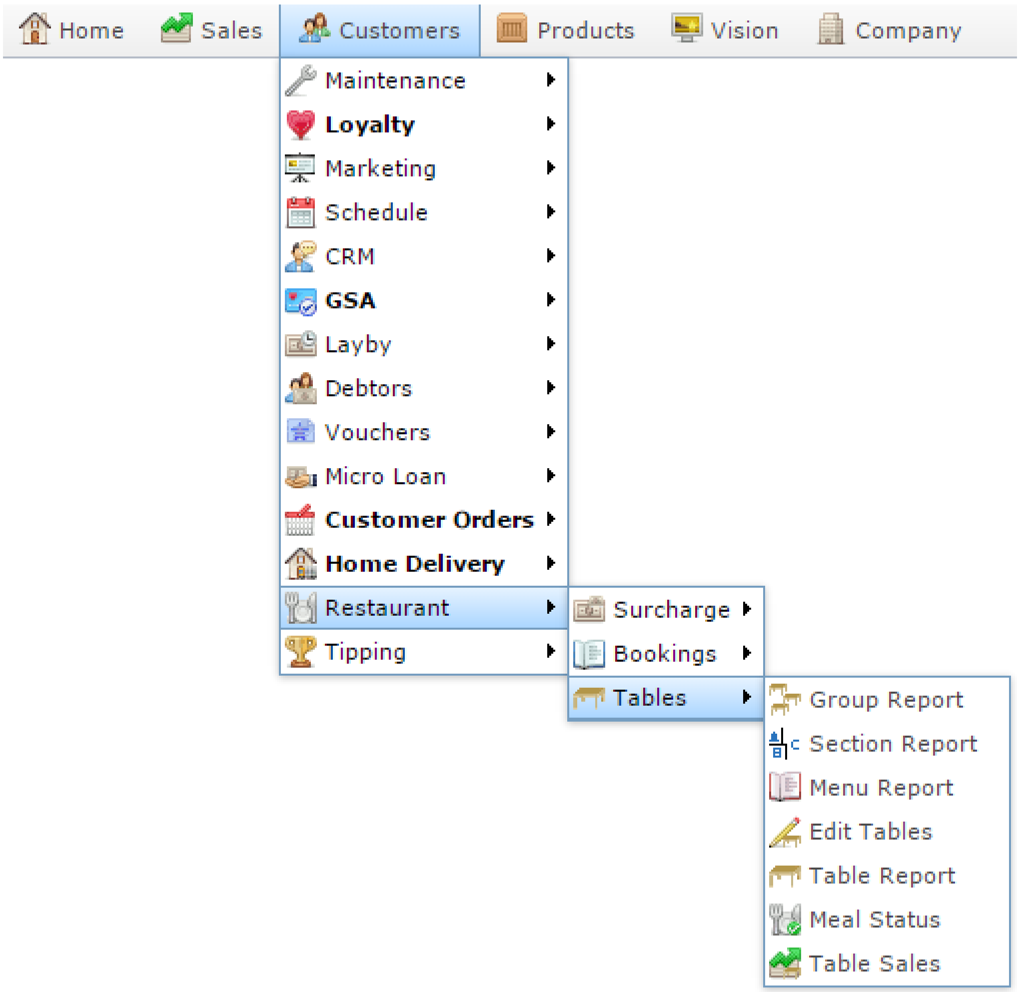
Editing a table group

Edit a group to enable or disable it, or change the description or order.

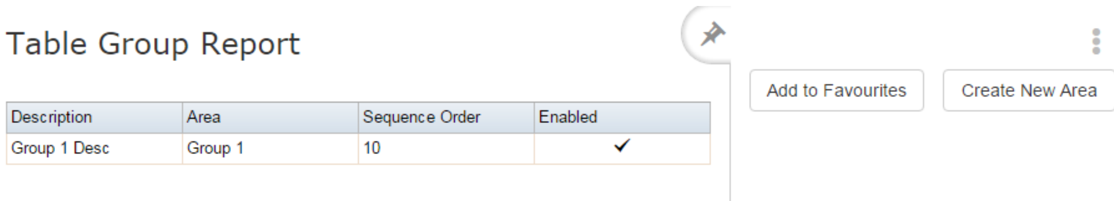
To edit a group:

1. Press 

.
2. Press **Restaurant** > **Tables** > **Group Report**.

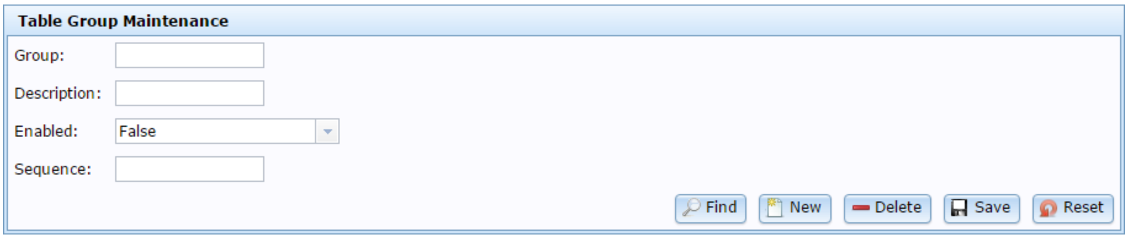


The Table Group report is displayed.



3. Press the **Description** of the table group you want to open.

The Table Group Maintenance screen is displayed.



4. Make the required changes.

   See *Group Maintenance screen* on page 15.

5. Press 

.

   The group is edited.

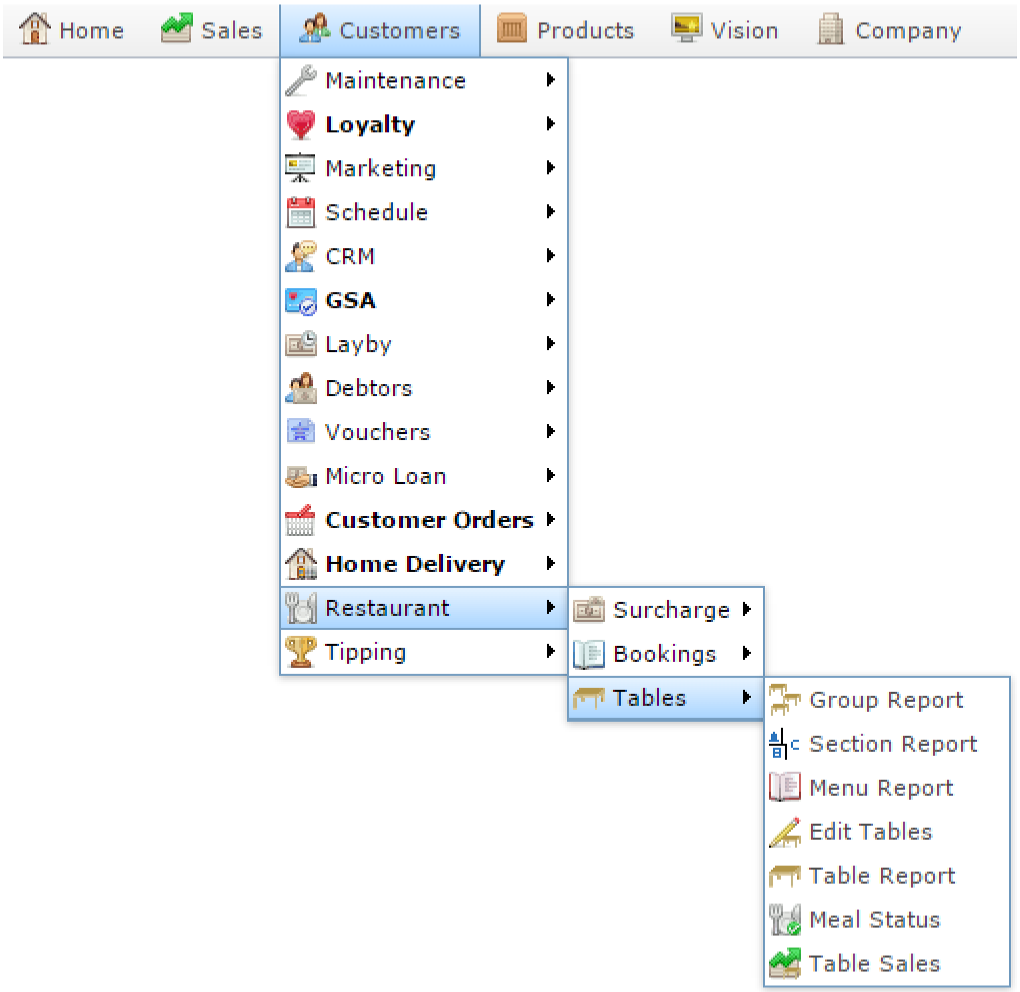
Deleting a table group

Delete a group to remove it from the Portal.

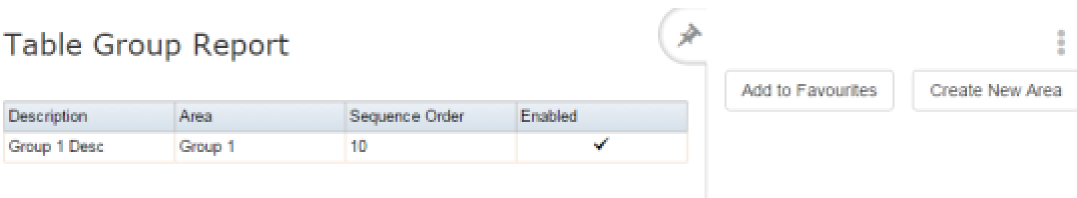
To delete a group:

1. Press 

.
2. Press **Restaurant** > **Tables** > **Group Report**.

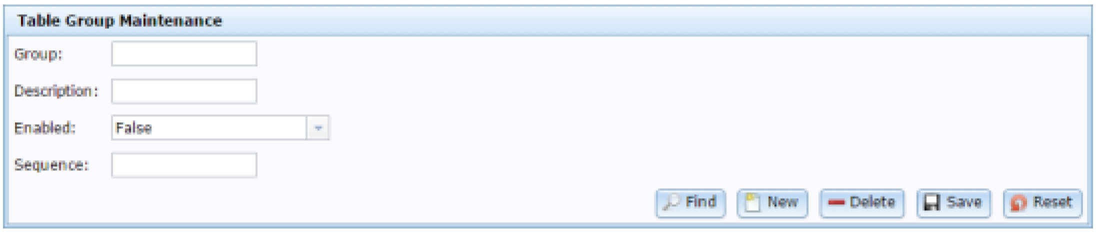


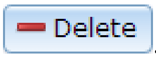
The Table Group report is displayed.



3. Press the **Description** of the table group you want to open.

The Table Group Maintenance screen is displayed.



4. Press 

.

The group is deleted.

Table Group report

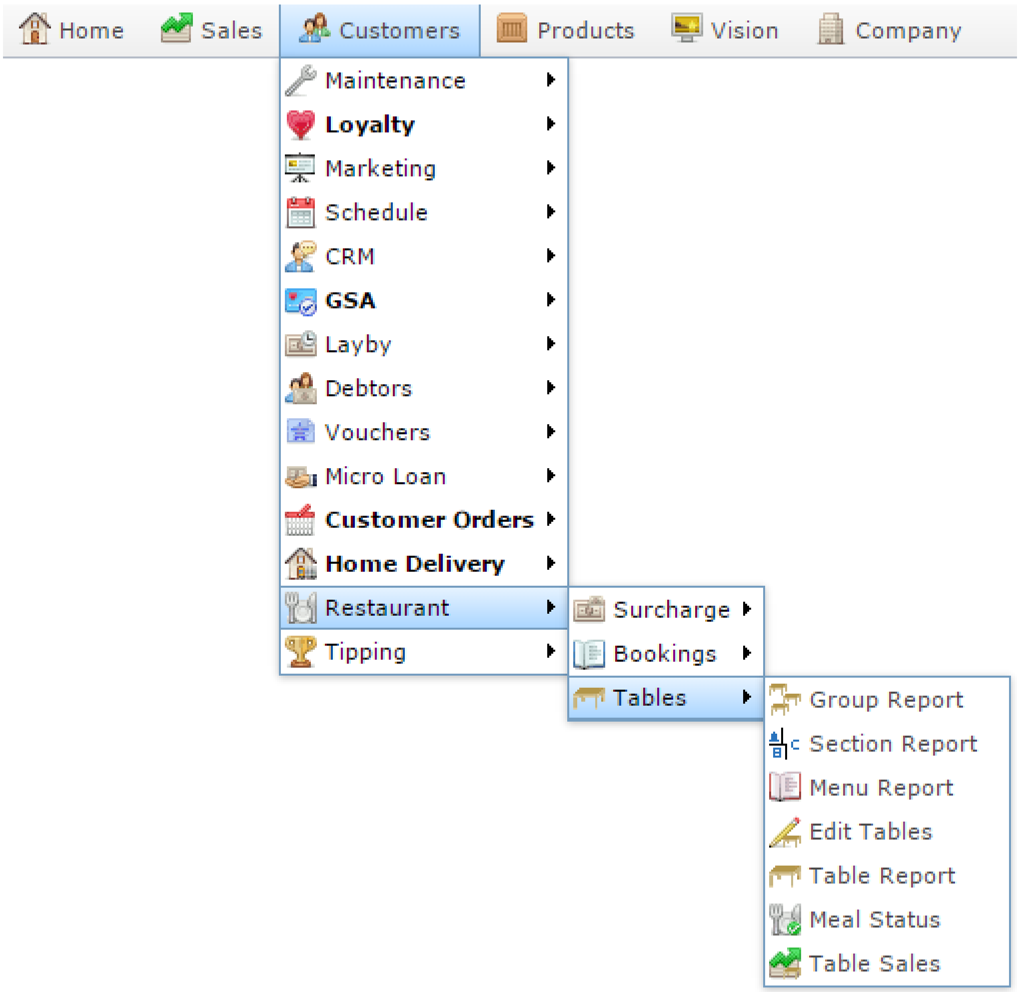
Use the Table Group report to view and find table groups.

Opening the Table Group report

To open the Table Group report:

1. Press 

.
2. Press **Restaurant** > **Tables** > **Group Report**.



The Table Group report is displayed.

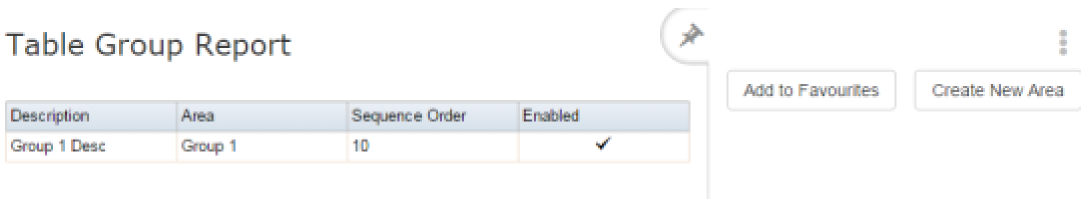


Table Group report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Create New Area	Press to create a new table group.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

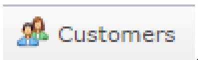
Field	Description
Description	Description of the table group.
Area	Unique name identifying the table group.
Sequence Order	Order the table group appears in on the PDT and drop-down lists. Lower numbers appear first.
Enabled	Whether the table area can be used by the Portal.

Group Maintenance screen

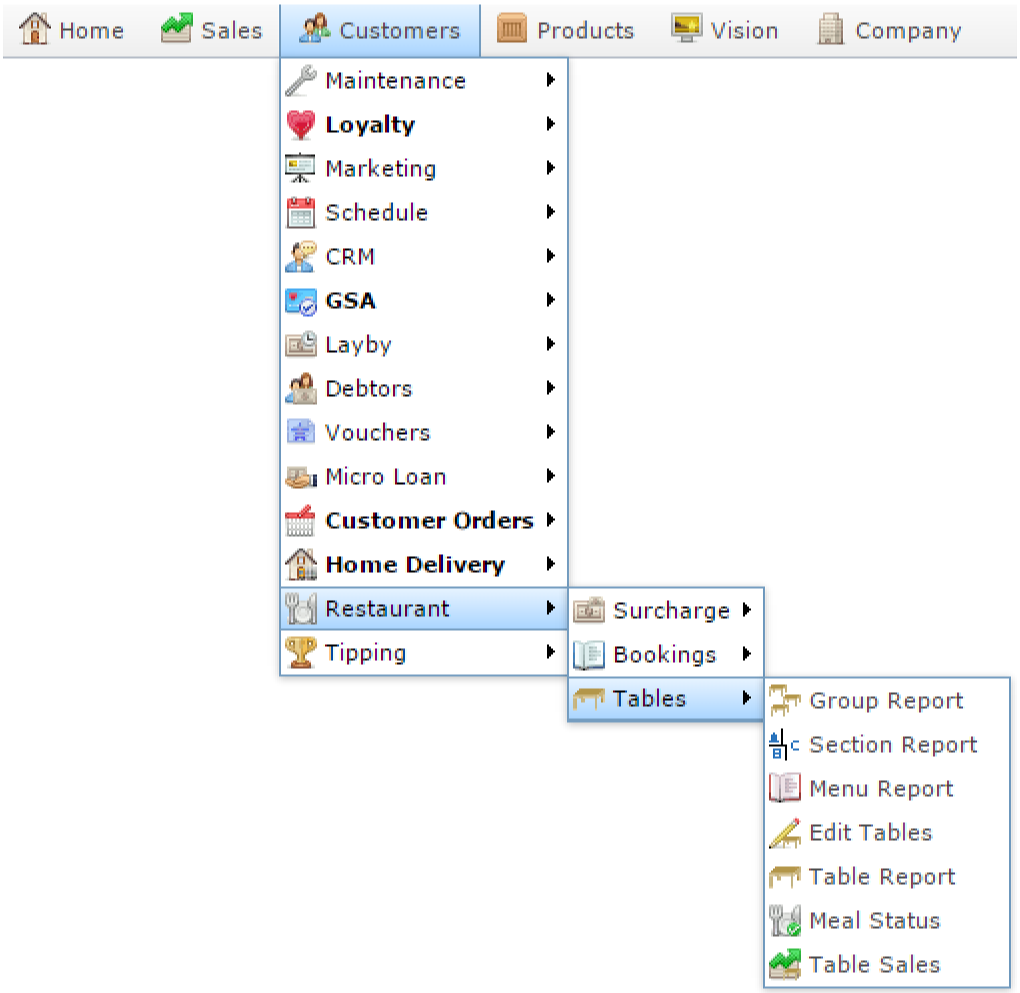
Use this screen to create and edit table groups to control which menu areas are available to which tables.

Opening the Group Maintenance screen

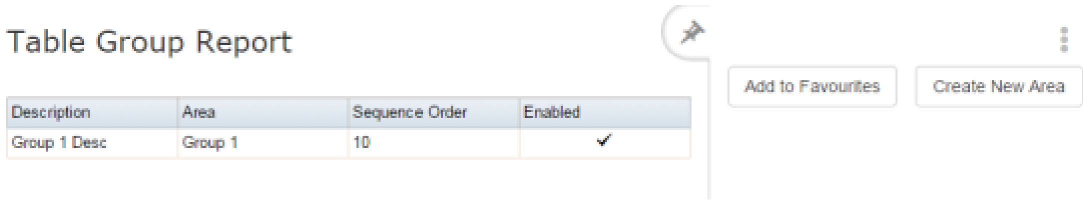
To open the Group Maintenance screen:

1. Press 

.
2. Press **Restaurant** > **Tables** > **Group Report**.

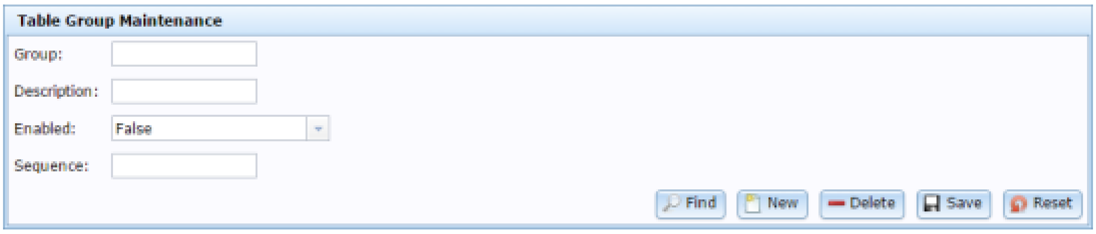


The Table Group report is displayed.



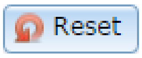
3. Press the **Description** of the table group you want to open.

   The Table Group Maintenance screen is displayed.



Group Maintenance screen key fields and buttons

Field	Description
Group	Type a unique code to identify the group.
Description	Type a description to identify the group.
Enabled	Select whether the group can be used by the Portal.
Sequence	Select the order the group appears in the PDTs. Lower numbers appear earlier.
Find	Press to return to the Table Group report to load another group.
New	Press to create a new group.
Delete	Press to delete this group.

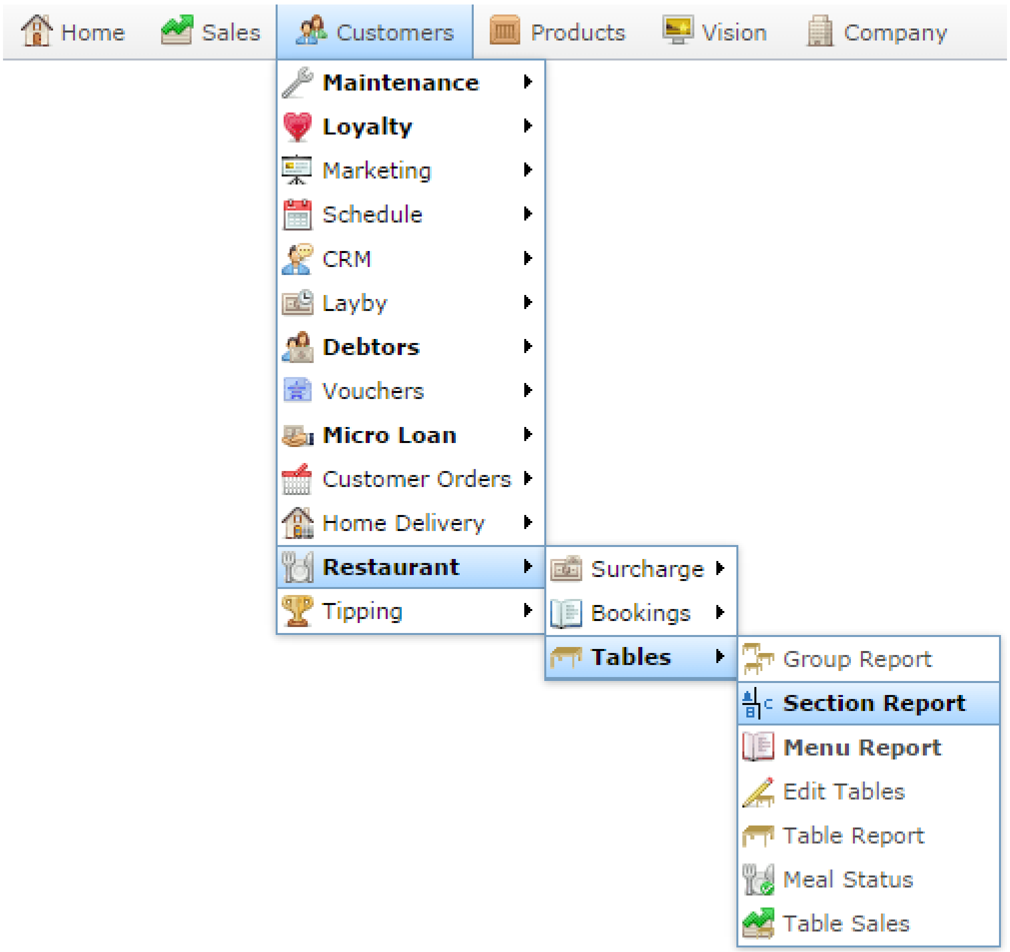
Field	Description
	Press to save any changes to this group.
	Press to cancel any changes made to the group since it was last saved.

Creating a table section

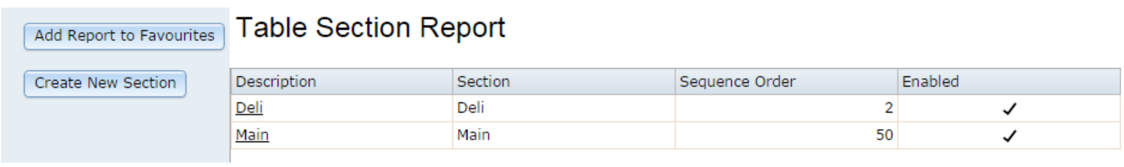
Create table sections to group menu areas for PDTs.

To create a table section:

1. Press Customers in the main menu bar.
2. Press **Restaurant** > **Tables** > **Section Report**.



The Table Section Report screen is displayed.



Add Report to Favourites

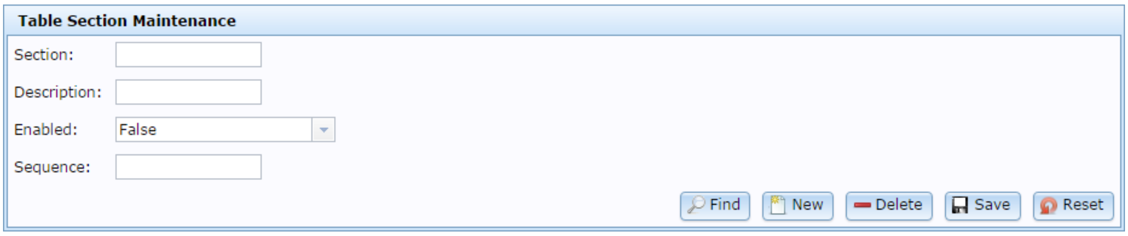
Create New Section

Table Section Report

Description	Section	Sequence Order	Enabled
Deli	Deli	2	✓
Main	Main	50	✓

3. Press Create New Section.

The Table Section Maintenance screen is displayed.



4. Type a name for the table section in the **Section** field.
5. Type a **Description** of the section.
6. Select **True** in the **Enabled** drop-down list.
7. Type a **Sequence** number to display the section in order on the PDT.
8. Press 

.

   The table section is created. You can now add menu areas to the section. See *Creating a menu area* on page 84.

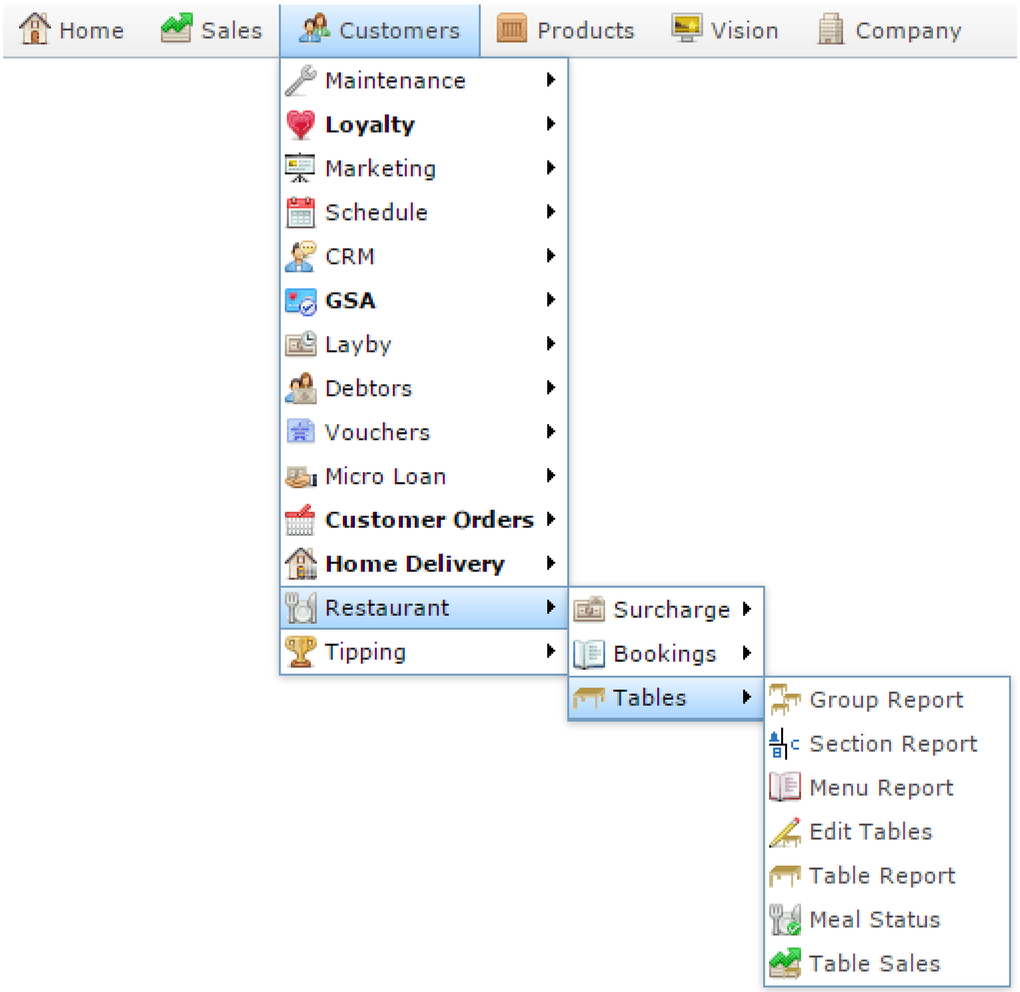
Editing a table section

Edit a section to enable or disable it, or change the description or order.

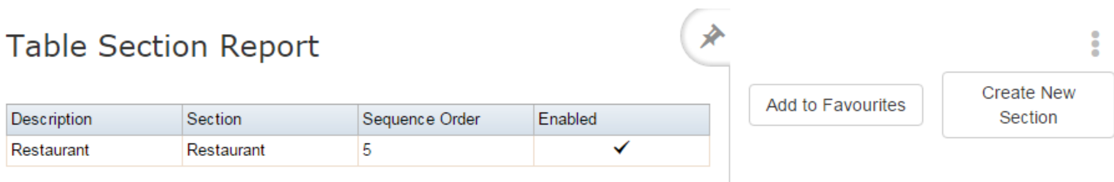
To edit a section:

1. Press 

.
2. Press **Restaurant** > **Table** > **Section Report**.

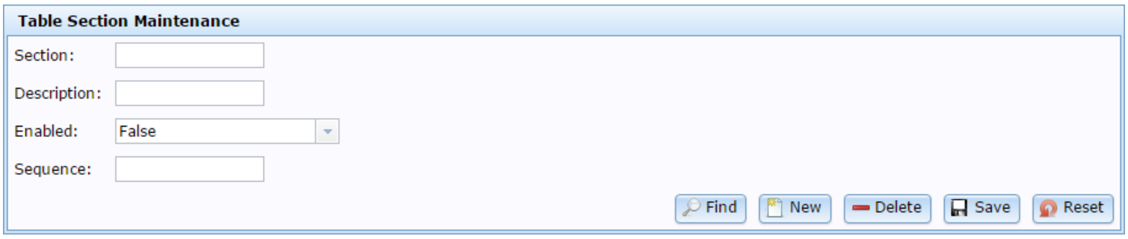


The Table Section report is displayed.



3. Press the **Description** of the table section you want to open.

The Table Section Maintenance screen is displayed.



4. Make the required changes.

   See *Table Section Maintenance screen* on page 26.

5. Press 

.

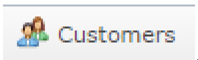
   The section is edited.

Deleting a table section

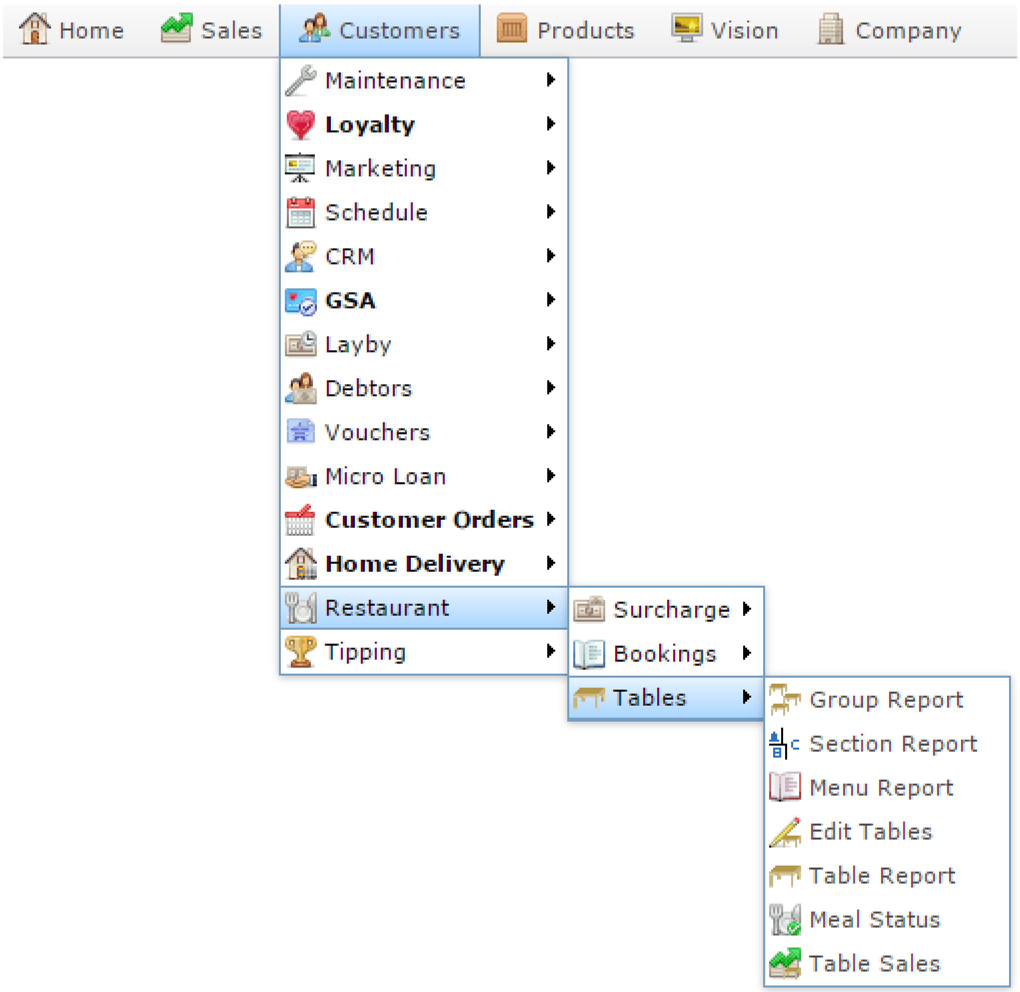
Delete a section to remove it from the Portal table service.

Note: You cannot delete a table section if it has tables allocated to it.

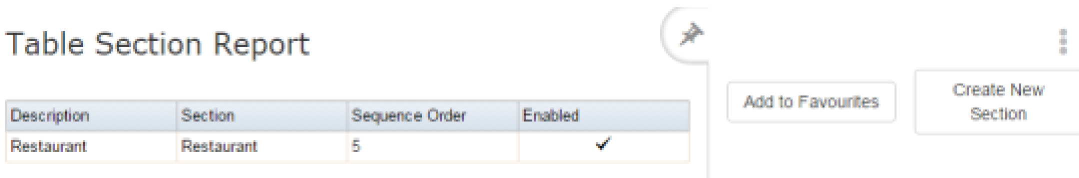
To delete a section:

1. Press 

.
2. Press **Restaurant** > **Table** > **Section Report**.

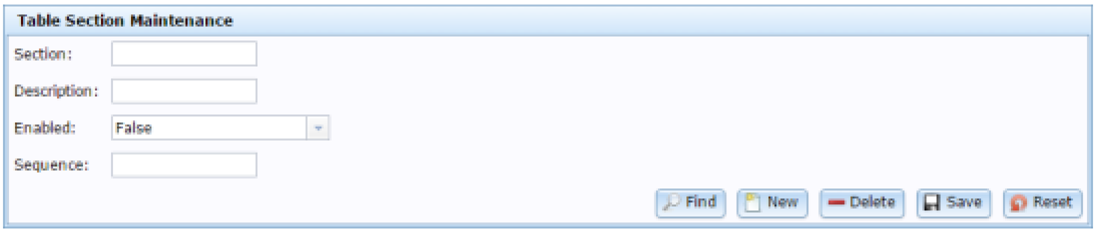


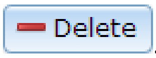
The Table Section report is displayed.



3. Press the **Description** of the table section you want to open.

   The Table Section Maintenance screen is displayed.



4. Press 

.

   The section is deleted.

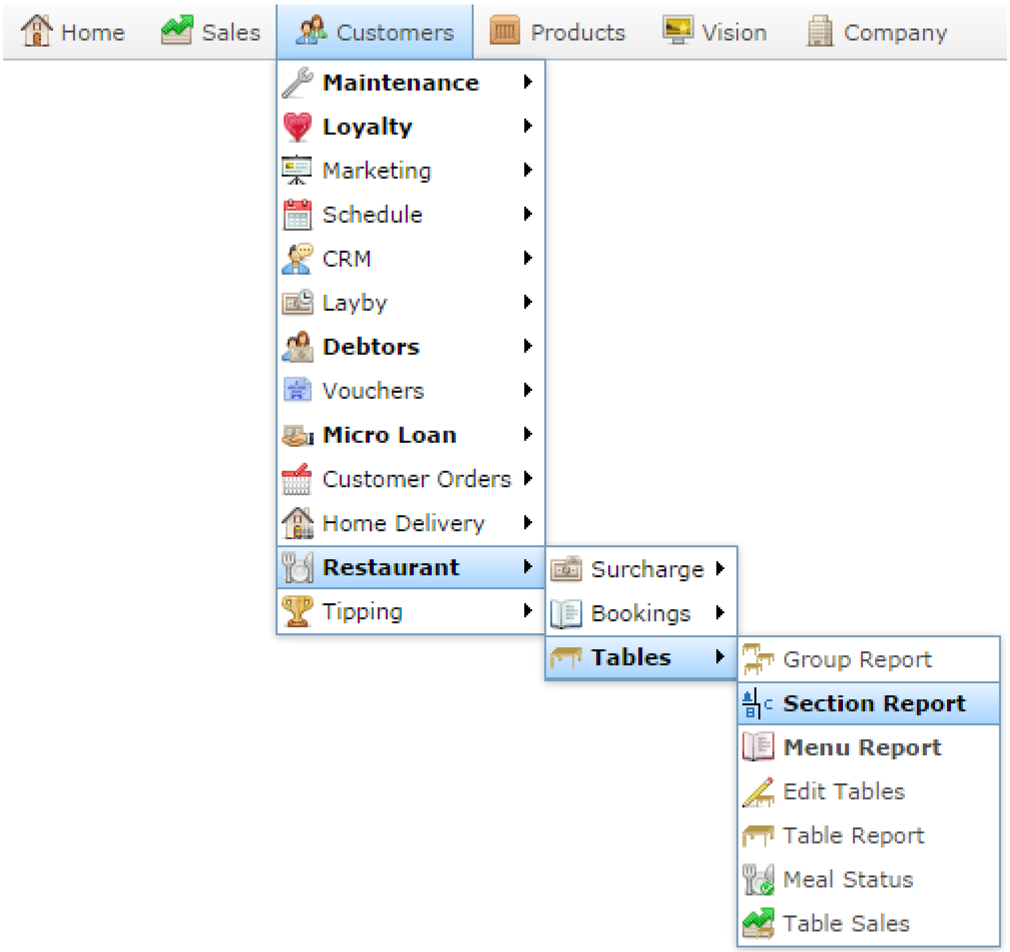
Table Section Report

Use this report to view and create table sections for table service.

Opening the Table Section Report

To open the Table Section Report:

1. Press  in the main menu bar.
2. Press **Restaurant** > **Tables** > **Section Report**.



The Table Section Report screen is displayed.

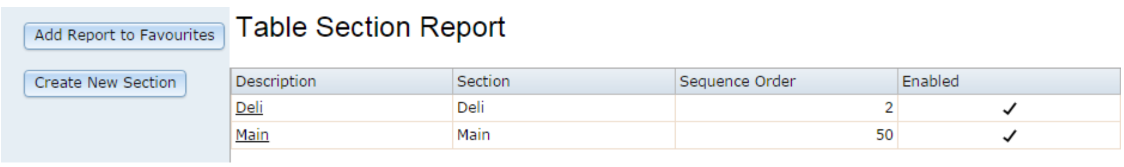


Table Section Report key fields and buttons

Field	Description
Add to Favourites	Press to add this report to your Portal favourites.
Create New Section	Press to create a new table section. See *Creating a table section* on page 18.
Description	Description of the table section. Press to edit the table section. See *Table Section Maintenance screen* on page 26.
Section	The name of the table section.
Sequence Order	Number indicating the order in which the table sections should appear on the PDT. Lower numbers appear first.
Enabled	Selected if this table section is available for use in the Portal.

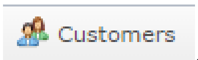
Table Section Maintenance screen

Use the Table Section Maintenance screen to create or edit table sections.

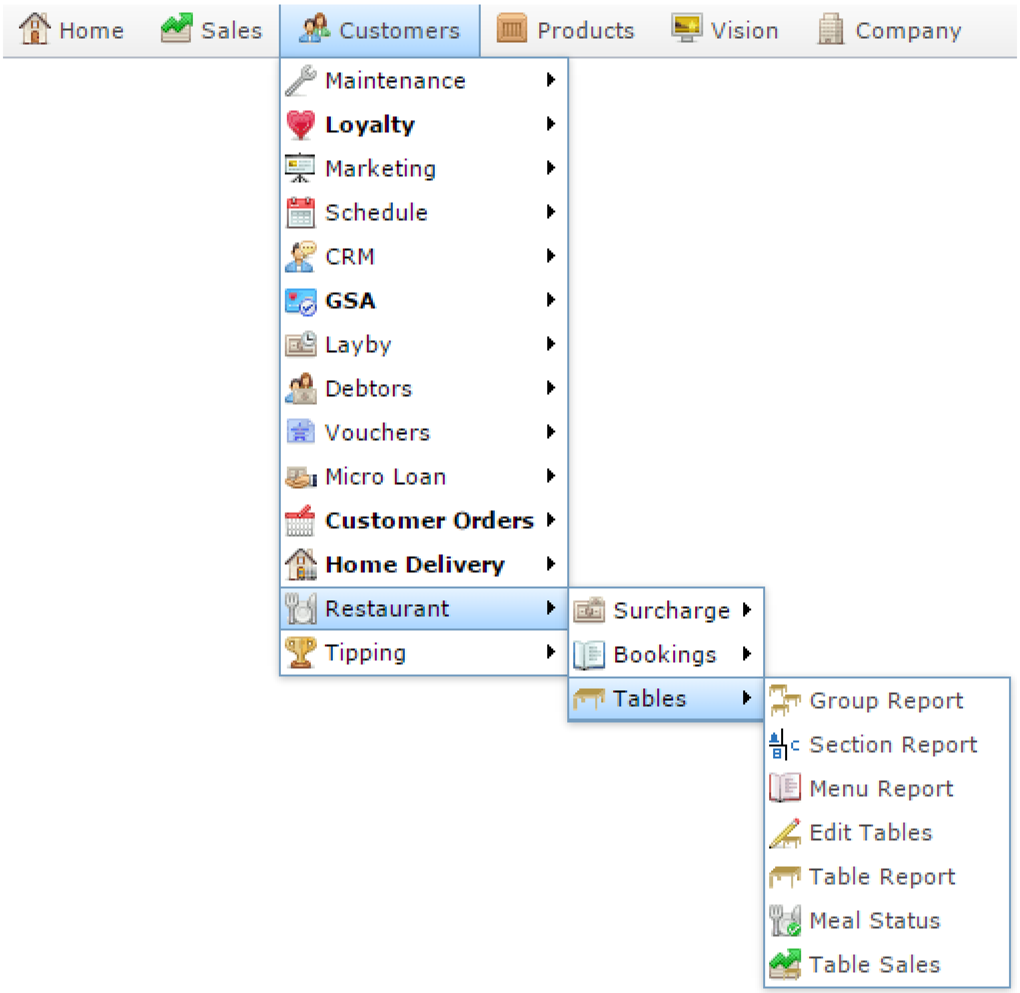
See *Creating a table section* on page 18.

Opening the Table Section Maintenance screen

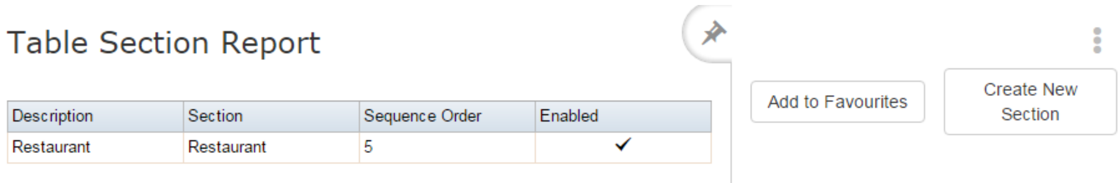
To open the Table Section Maintenance screen:

1. Press 

.
2. Press **Restaurant > Table > Section Report**.



The Table Section report is displayed.



3. Press the **Description** of the table section you want to open.

   The Table Section Maintenance screen is displayed.

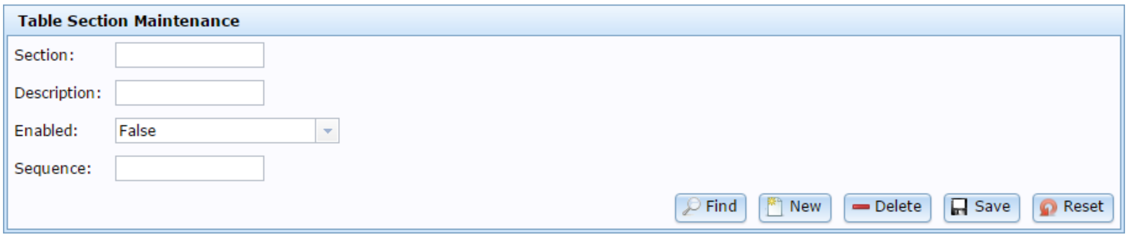


Table Section Maintenance screen key fields and buttons

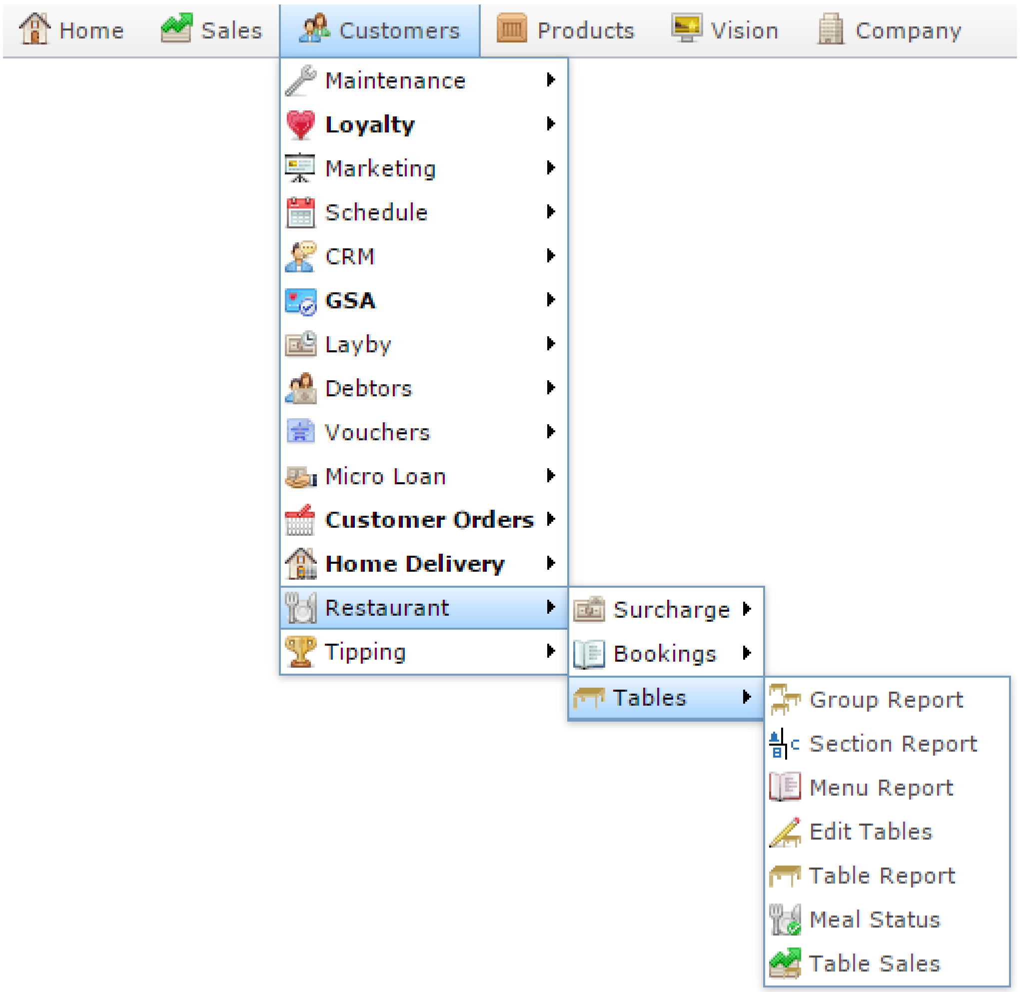
Field	Description
Section	Name of the table section.
Description	Description of the table section.
Enabled	Select **True** to make the table section available for use within the Portal.
Sequence	Type the order the table section should appear on the PDT. Lower numbers are displayed first.
Find	Return to the Section Report. See *Table Section Report* on page 24.
New	Create a new table section. See *Creating a table section* on page 18.
Delete	Delete the table section.
Save	Save changes to the table section.
Reset	Revert any unsaved changes to the table section.

Creating a table

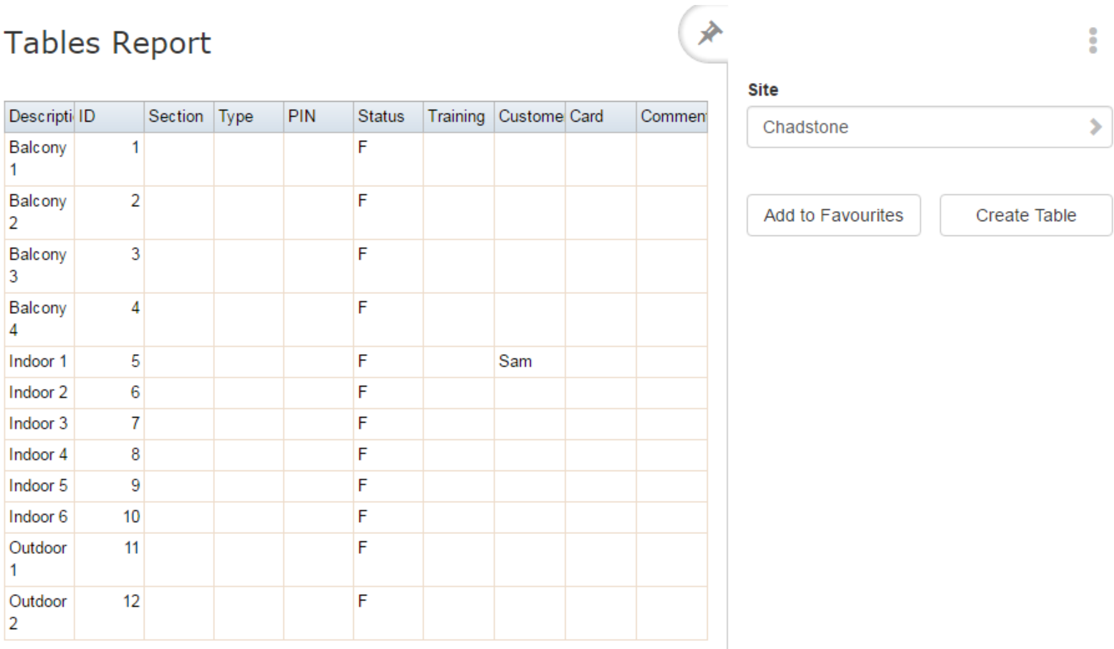
Create a table to allocate seating to customers during table service.

To create a table:

1. Press .
2. Press **Restaurant** > **Table** > **Edit Tables**.



The Tables report is displayed.

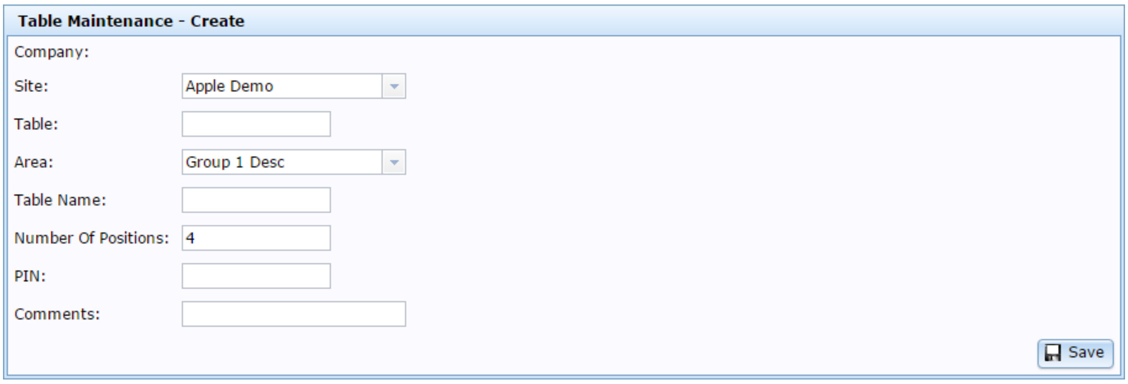


Tables Report

Descripti	ID	Section	Type	PIN	Status	Training	Custome	Card	Commen
Balcony 1	1				F				
Balcony 2	2				F				
Balcony 3	3				F				
Balcony 4	4				F				
Indoor 1	5				F		Sam		
Indoor 2	6				F				
Indoor 3	7				F				
Indoor 4	8				F				
Indoor 5	9				F				
Indoor 6	10				F				
Outdoor 1	11				F				
Outdoor 2	12				F				

3. Press 
.

   The Table Maintenance screen is displayed.



   See *Table Maintenance screen* on page 40.

4. Type a unique code to identify the table in the **Table**field.
5. Select the table area from the **Area** drop-down field.
6. Type a description of the table in the **Table Name**field.
7. Type the number of people who can sit at the table in the **Number of Positions**field.

   Lower numbers appear earlier in lists and PDT screens.

8. Press 
.

   The table is created.

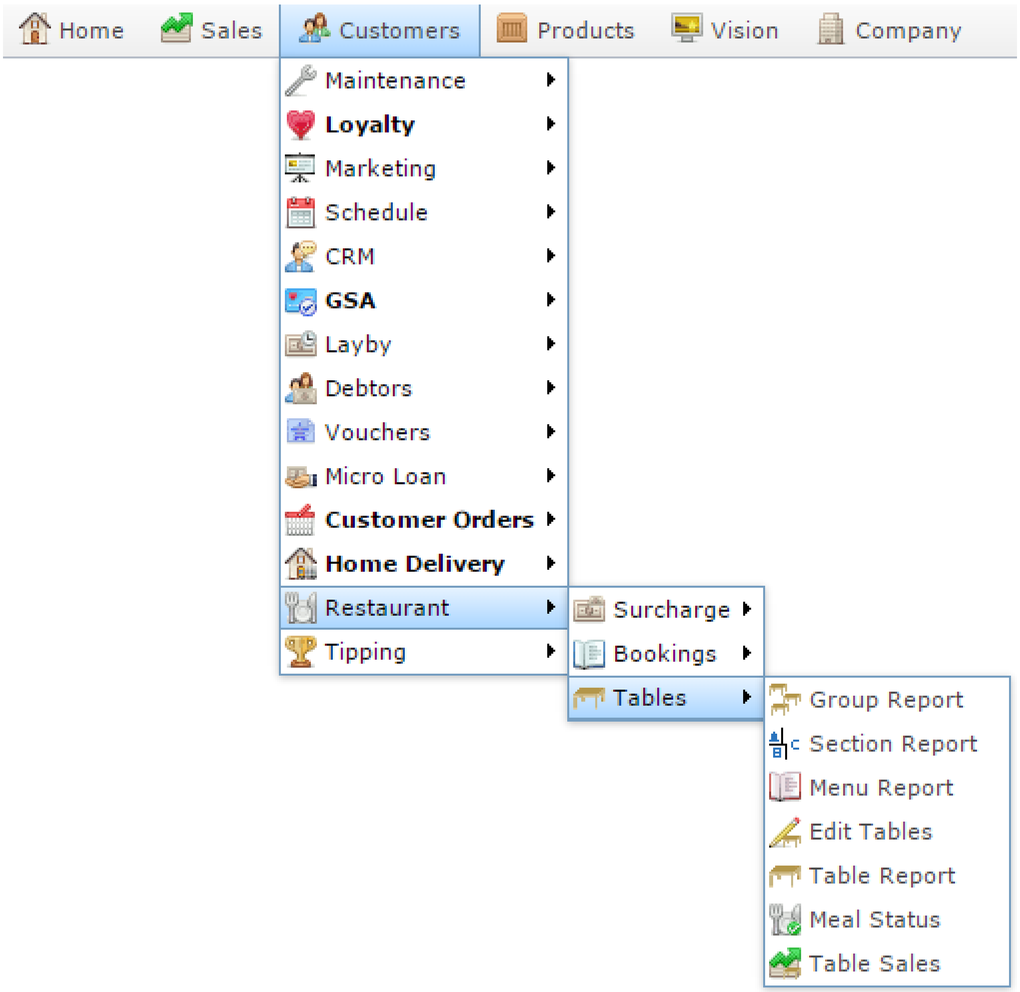
Editing a table

Edit a section to change the description, number of people it seats, section or area.

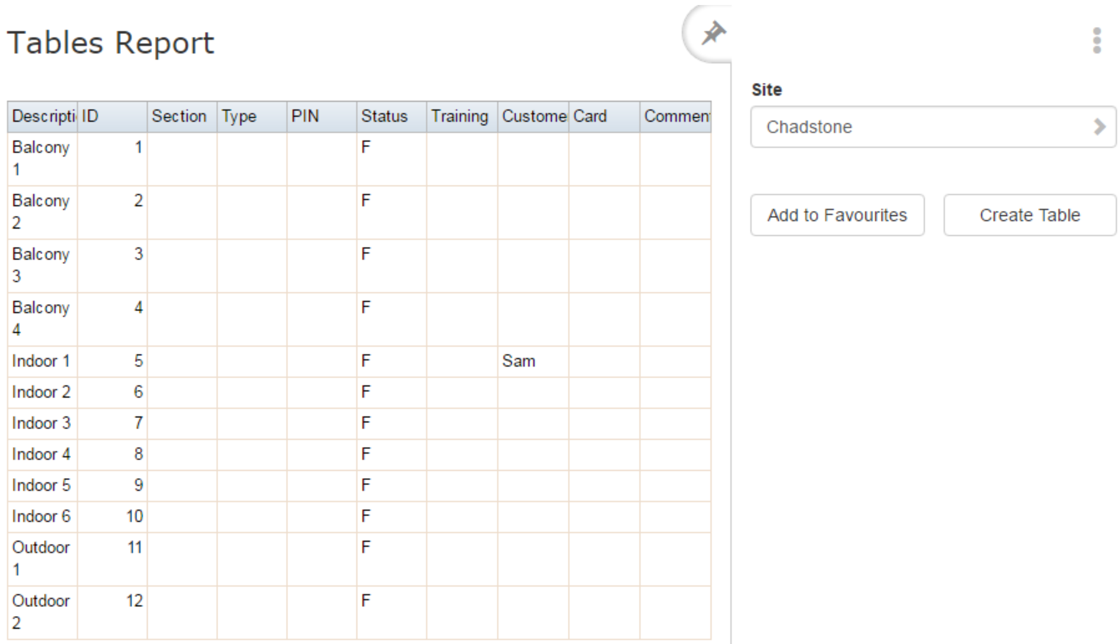
To edit a table:

1. Press 

.
2. Press **Restaurant** > **Table** > **Edit Tables**.



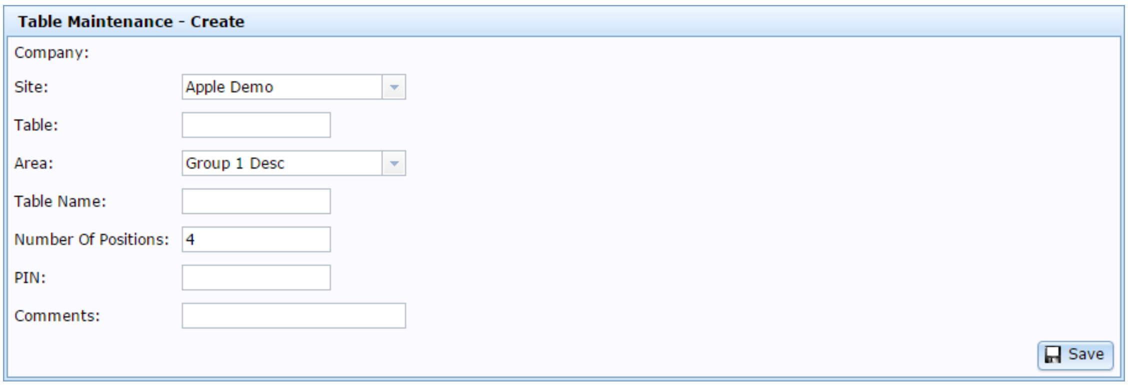
The Tables report is displayed.



Descripti	ID	Section	Type	PIN	Status	Training	Custome	Card	Commen
Balcony 1	1				F				
Balcony 2	2				F				
Balcony 3	3				F				
Balcony 4	4				F				
Indoor 1	5				F		Sam		
Indoor 2	6				F				
Indoor 3	7				F				
Indoor 4	8				F				
Indoor 5	9				F				
Indoor 6	10				F				
Outdoor 1	11				F				
Outdoor 2	12				F				

3. Press the **Description** of the table you want to open.

   The Table Maintenance screen is displayed.



4. Make the required changes.

   See *Table Maintenance screen* on page 40.

5. Press Save.

   The table is edited.

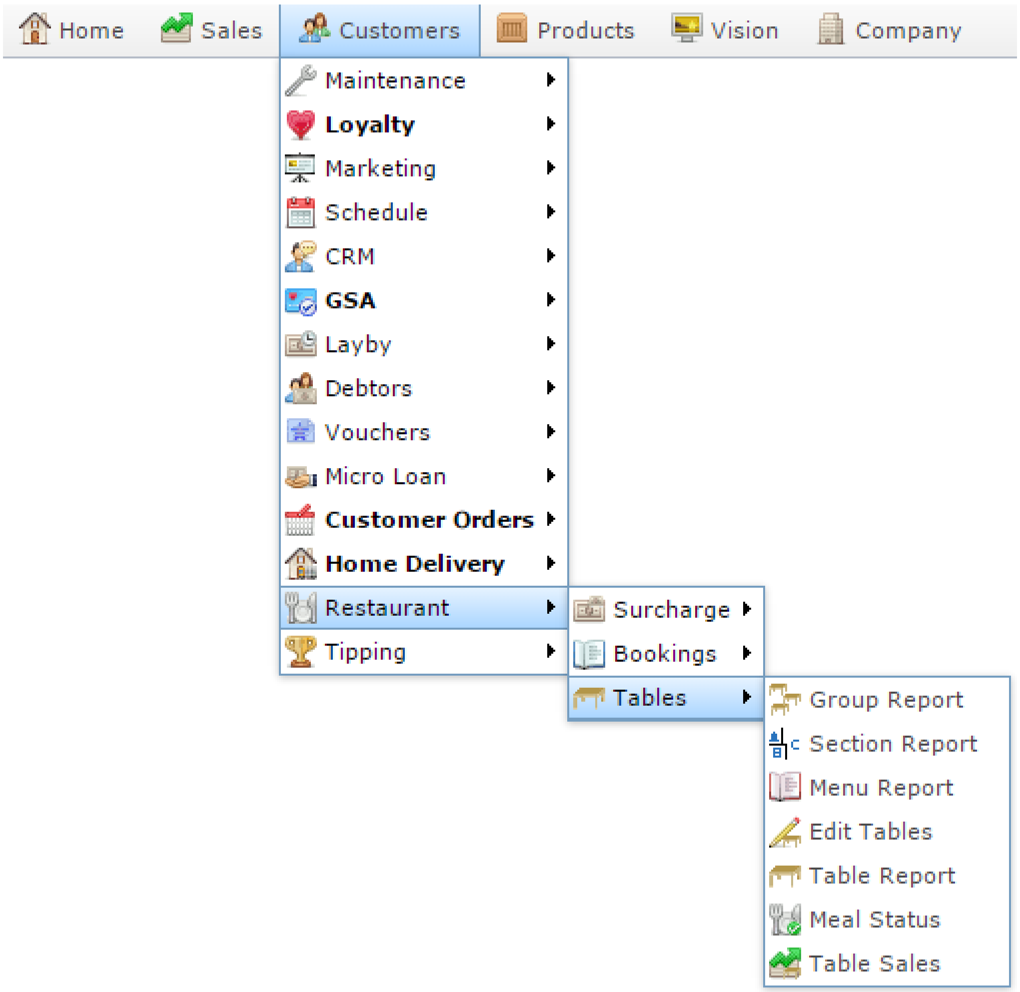
Deleting a table

Delete a table to remove it from your Portal table service.

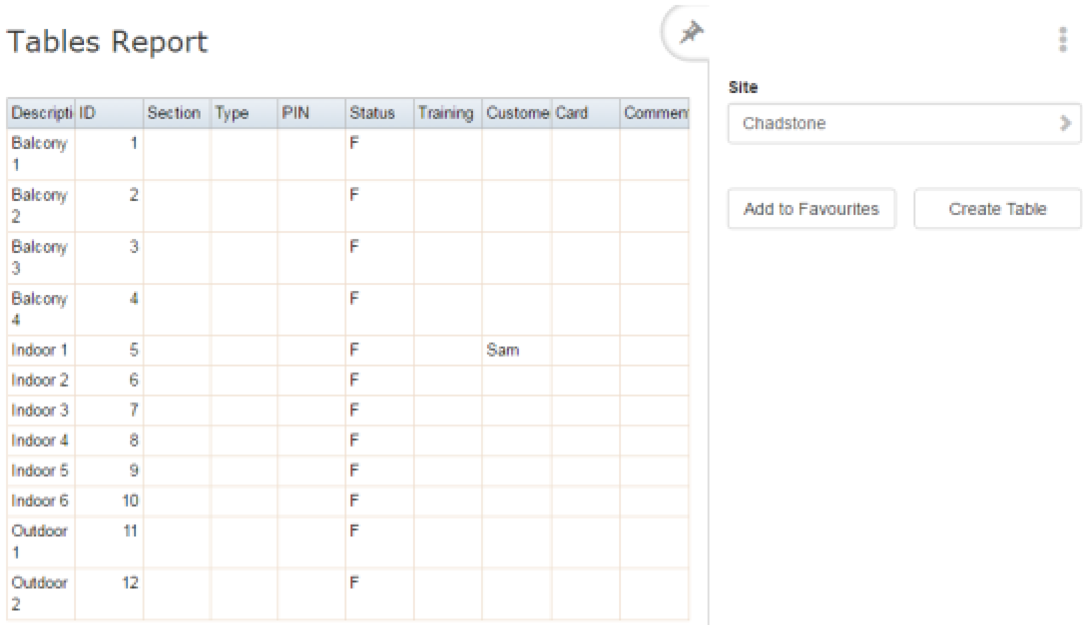
To delete a table:

1. Press 

.
2. Press **Restaurant** > **Table** > **Edit Tables**.



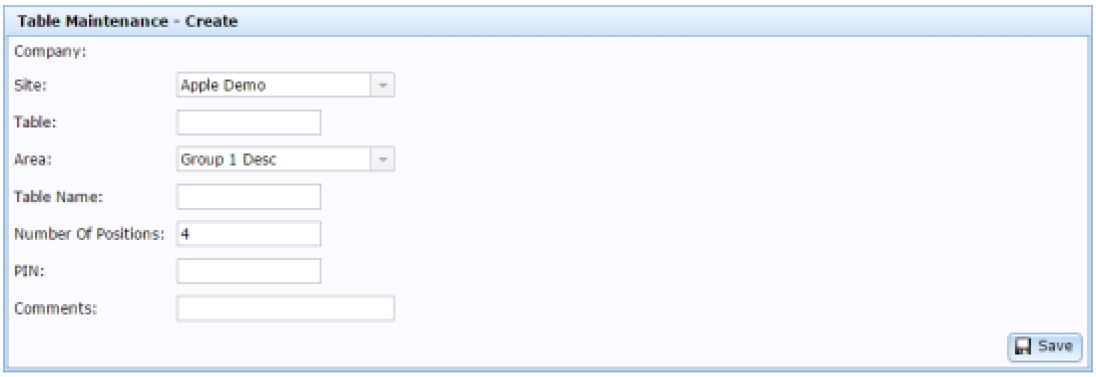
The Tables report is displayed.



Descripti	ID	Section	Type	PIN	Status	Training	Custome	Card	Commen
Balcony 1	1				F				
Balcony 2	2				F				
Balcony 3	3				F				
Balcony 4	4				F				
Indoor 1	5				F		Sam		
Indoor 2	6				F				
Indoor 3	7				F				
Indoor 4	8				F				
Indoor 5	9				F				
Indoor 6	10				F				
Outdoor 1	11				F				
Outdoor 2	12				F				

3. Press the **Description** of the table you want to open.

   The Table Maintenance screen is displayed.



4. Press Delete.

   The table is deleted.

Tables report

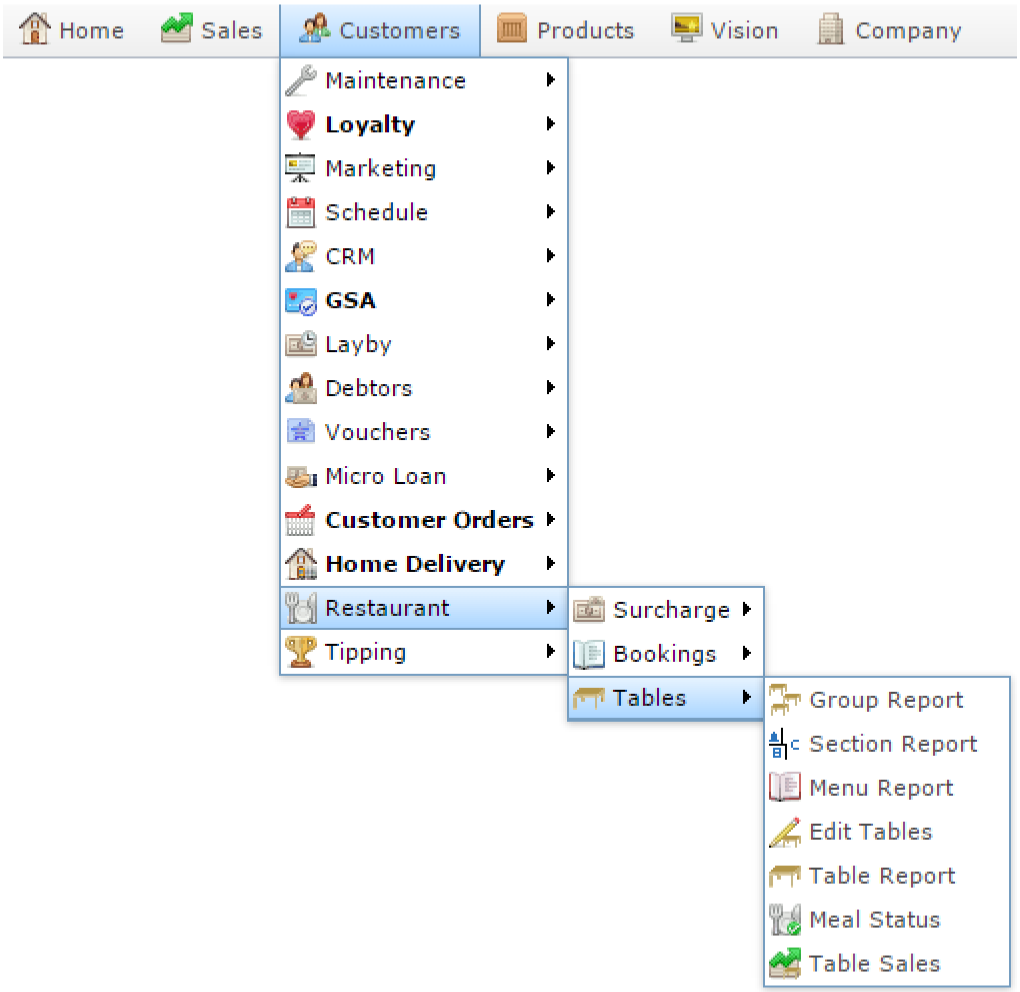
Use the Tables report to view, create and edit tables for your table service.

Opening the Tables report

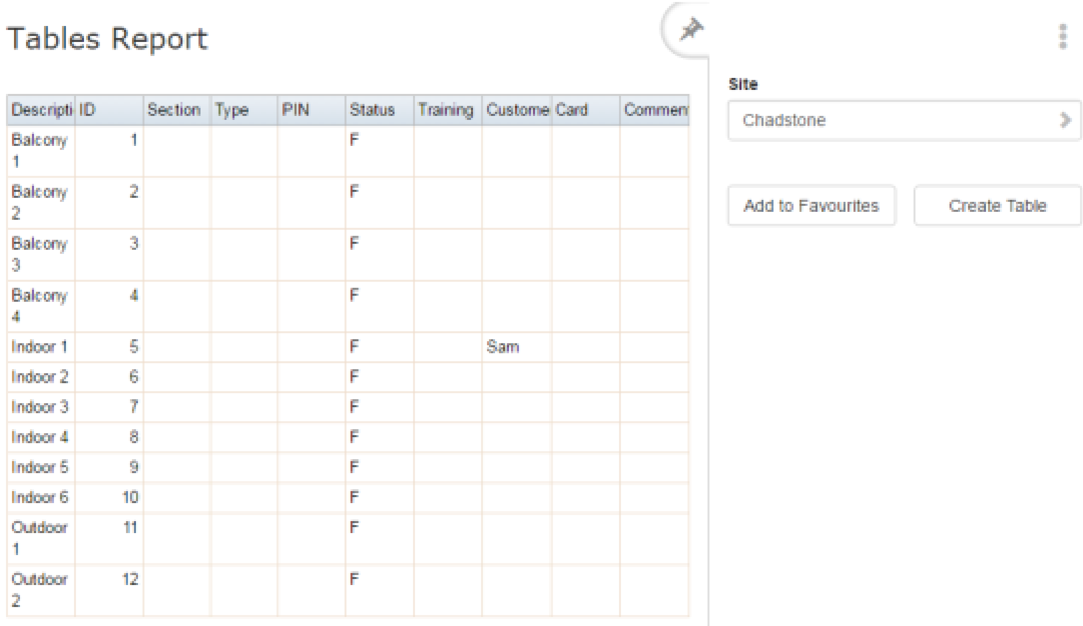
To open the Tables report:

1. Press 

.
2. Press **Restaurant** > **Table** > **Edit Tables**.



The Tables report is displayed.



Descripti	ID	Section	Type	PIN	Status	Training	Custome	Card	Commen
Balcony 1	1				F				
Balcony 2	2				F				
Balcony 3	3				F				
Balcony 4	4				F				
Indoor 1	5				F		Sam		
Indoor 2	6				F				
Indoor 3	7				F				
Indoor 4	8				F				
Indoor 5	9				F				
Indoor 6	10				F				
Outdoor 1	11				F				
Outdoor 2	12				F				

Tables report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Create Table	Press to create a new table in table service.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Table / Description	Description of the table being reported on.
ID / Table # / Table	Unique code identifying the table.
Section	Table section the table is assigned to.
Type	The last transaction type used at this table. For example, take away.
PIN	The Pay At Table code used to identify this table.
Status	Whether the table is currently occupied. This status is dictated by activity on the Point of Sale.
Training	Indicates if this table is currently used for training.

Field	Description
Customer	Name of the customer responsible for the table.
Card	Loyalty card number of the customer currently at the table, if applicable.
Comment	Any comment on the table. **Note:** This field is not used with the iZen Point of Sale.

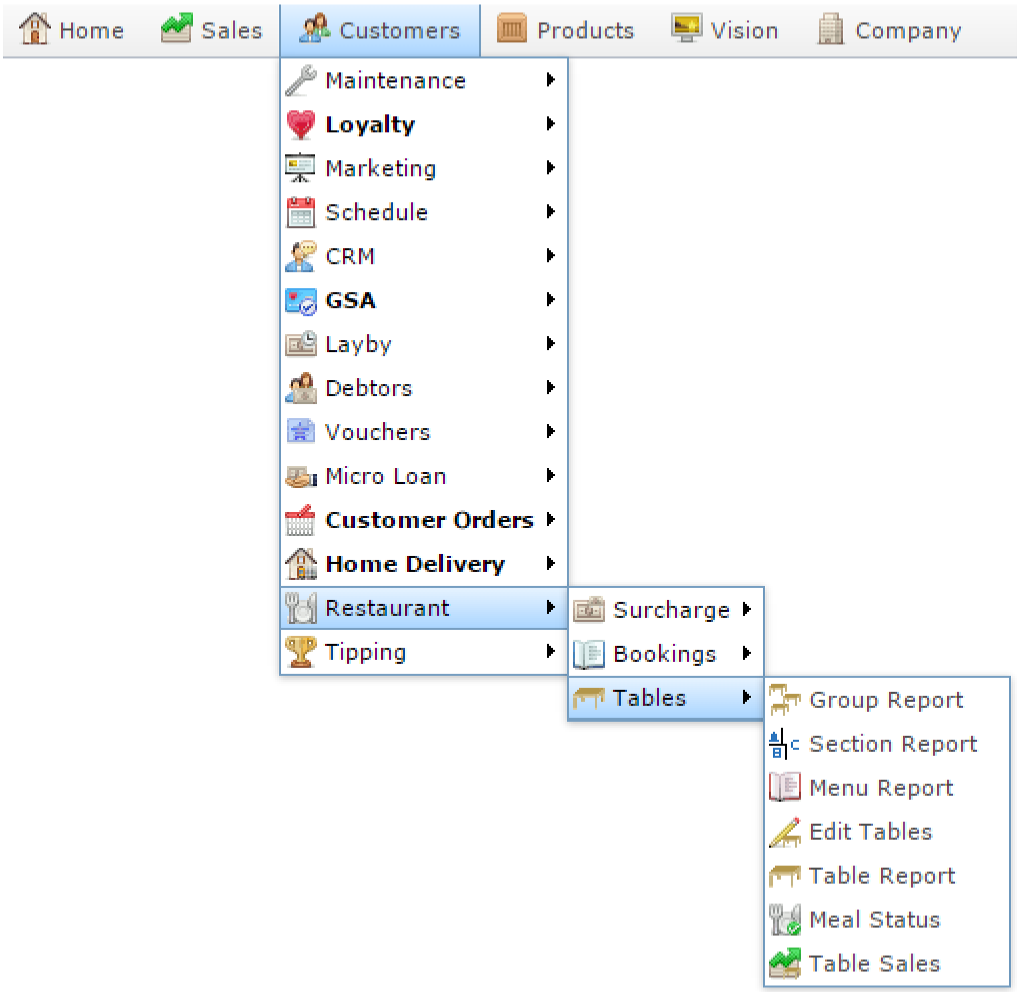
Table Maintenance screen

Use this screen to create and edit tables for your table service.

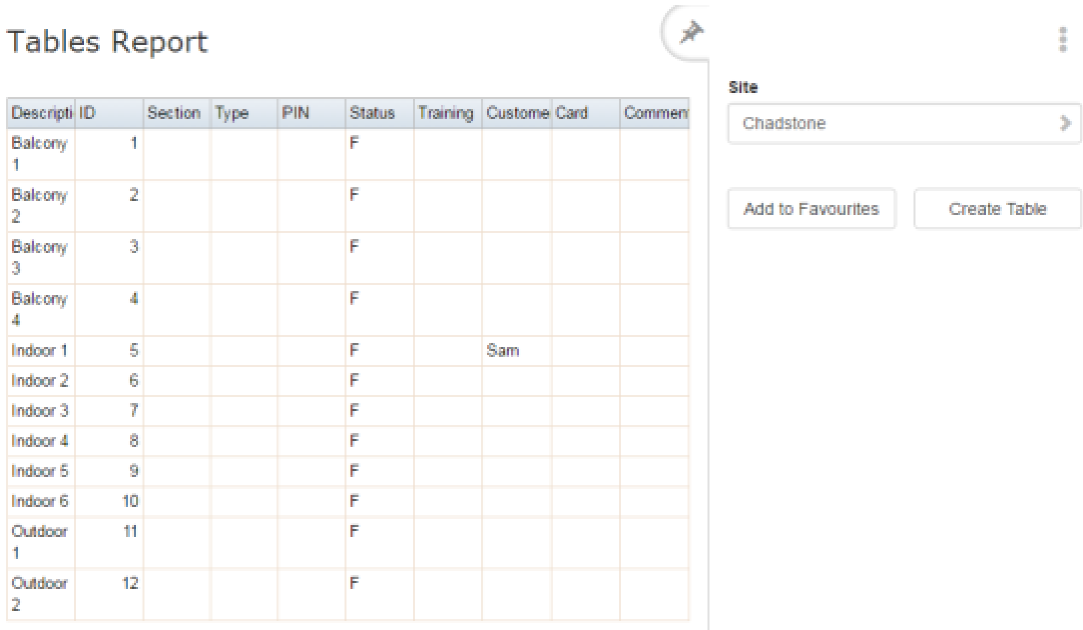
Opening the Table Maintenance screen

To open the Table Maintenance screen:

1. Press 
.
2. Press **Restaurant** > **Table** > **Edit Tables**.



The Tables report is displayed.



3. Press the **Description** of the table you want to open.

   The Table Maintenance screen is displayed.

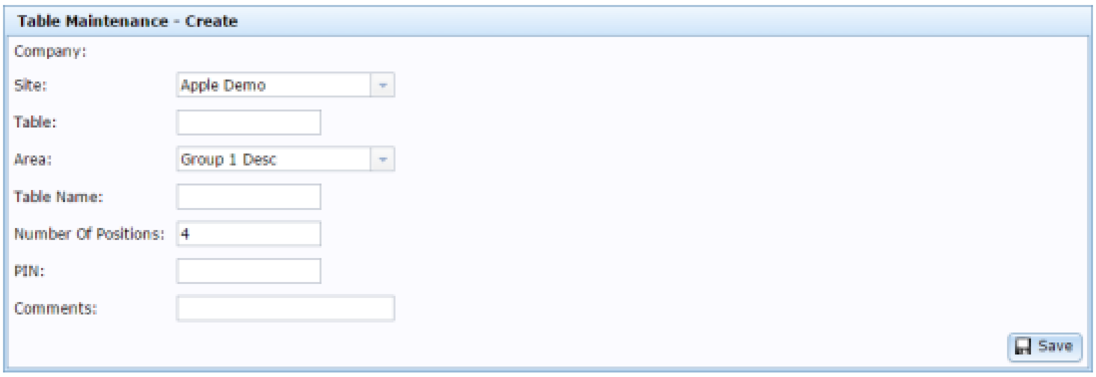


Table Maintenance screen key fields and buttons

Field	Description
Company	The company the table is configured for.
Site	The site the table is configured for.
Table	A unique number to identify the table.

Field	Description
Area	The table group the table belongs to.
Table Name	A description of the table.
Number of Positions	The number of people the table can seat.
PIN	QUERY: What is the PIN for?
Comments	Any comments on the table, for example, accessibility issues.

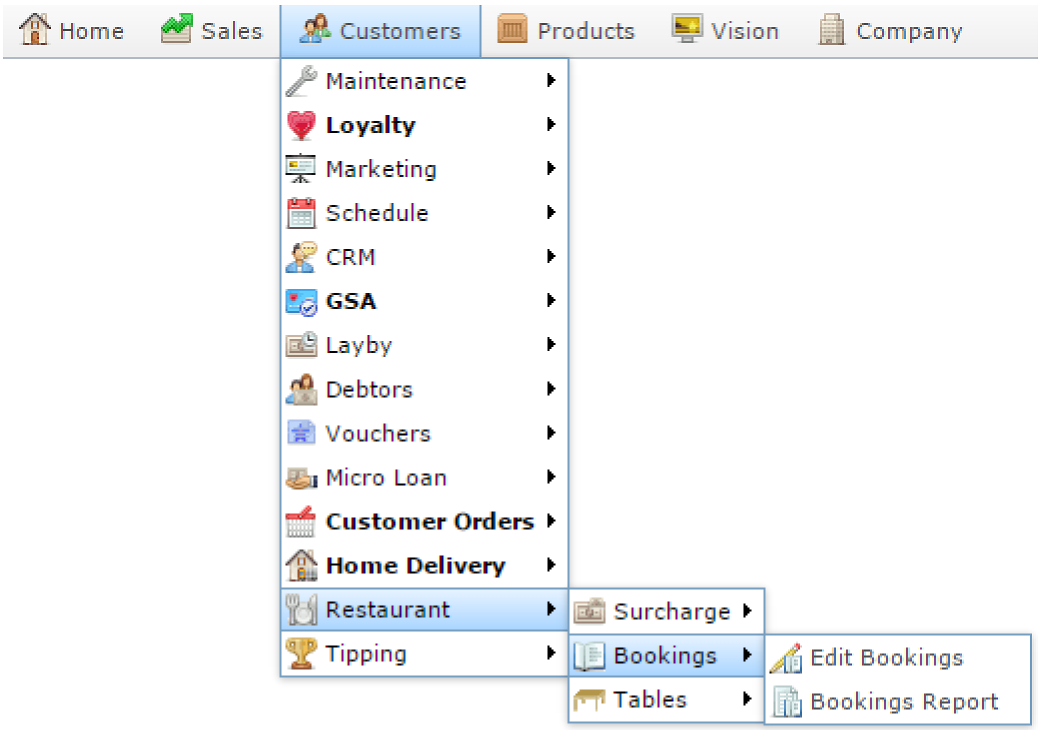
Creating a table booking

Create a booking to reserve a table for a customer at a set time and date.

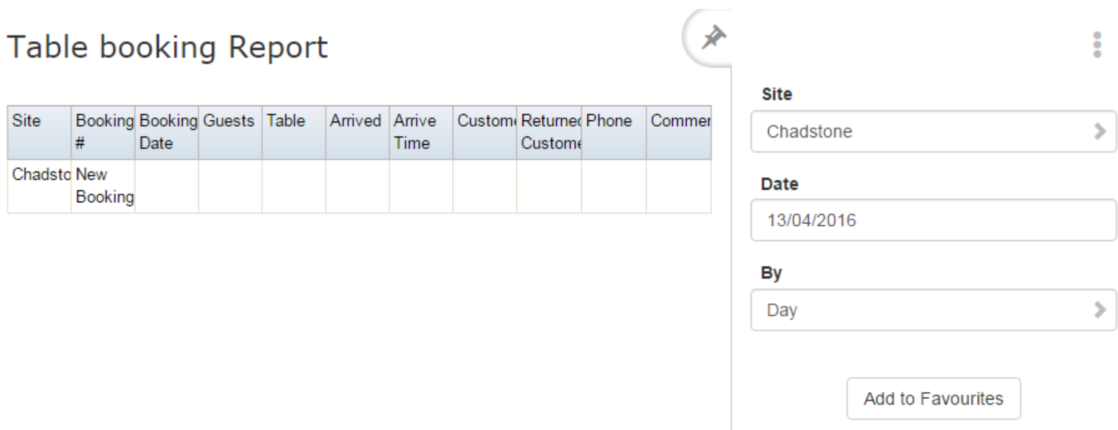
To create a booking:

1. Press 

.
2. Press **Restaurant** > **Bookings** > **Bookings Report**.

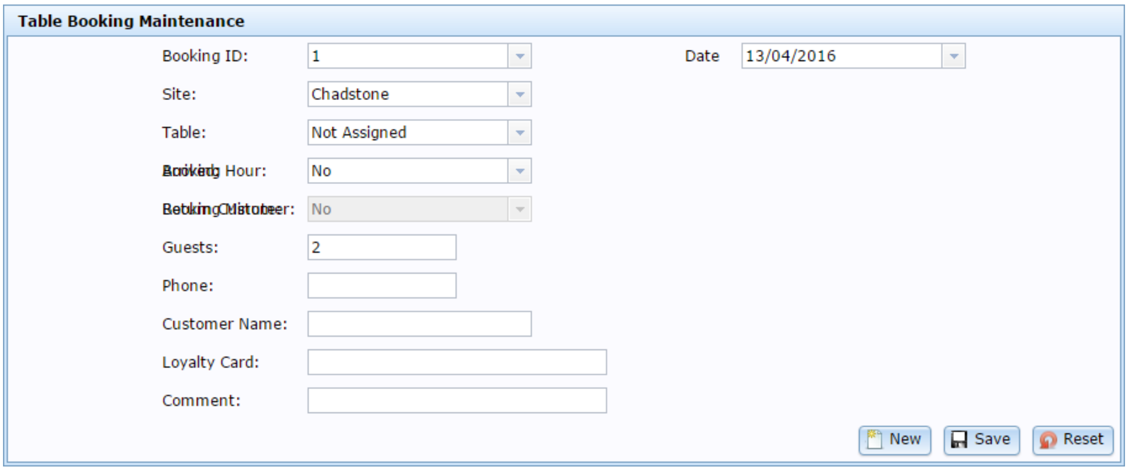


The Table Booking report is displayed.



3. Press **New Booking** in the **Booking #** field.

The Table Booking Maintenance screen is displayed.



4. Select the **Site** you want to make the booking for from the drop-down list.
5. Select the **Table** you want to reserve from the drop-down list.
6. Type the customer's name in the **Customer Name** field.
7. Type a contact phone number in the **Phone** field.
8. Add any other information as required.

   See *Table Booking Maintenance screen* on page 53.

9. Press 

.

   The booking is created.

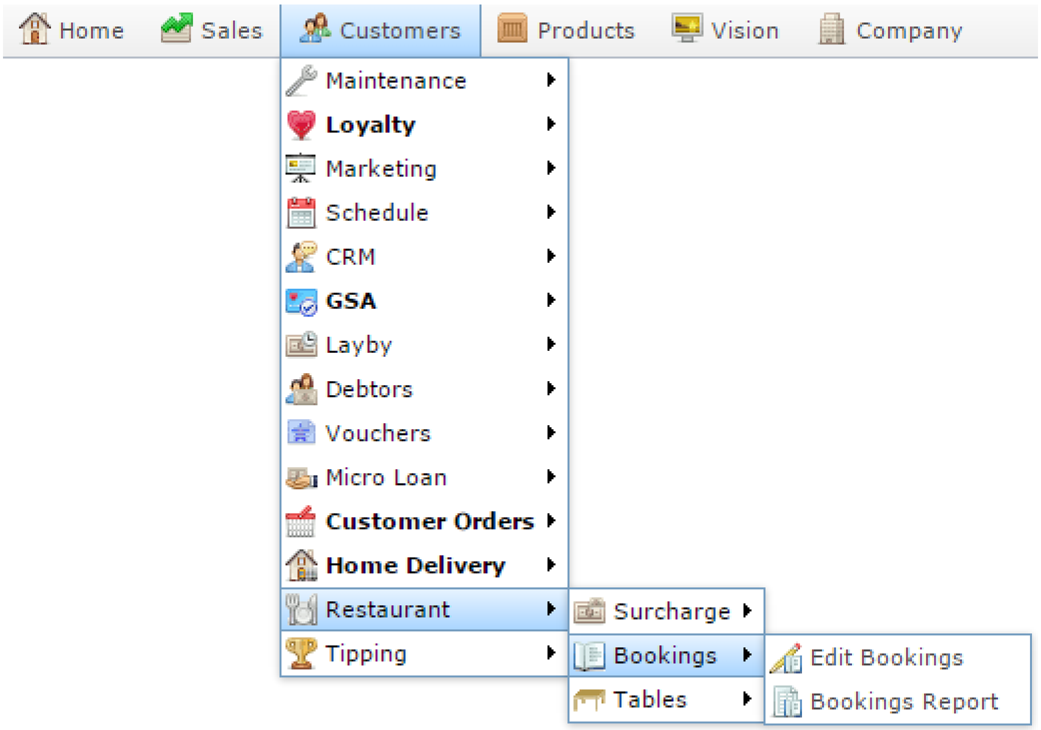
Editing a table booking

Edit a booking to make changes such as the time or the number of guests.

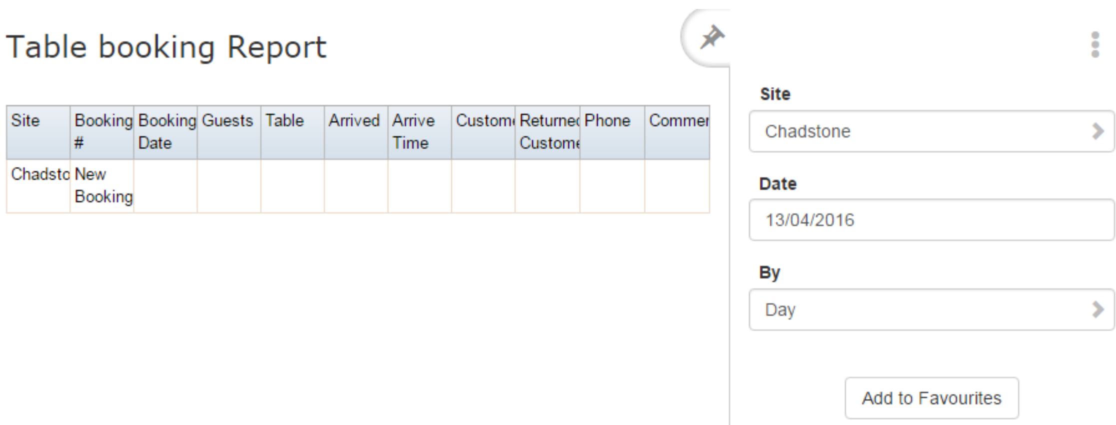
To edit a booking:

1. Press 

.
2. Press **Restaurant** > **Bookings** > **Bookings Report**.

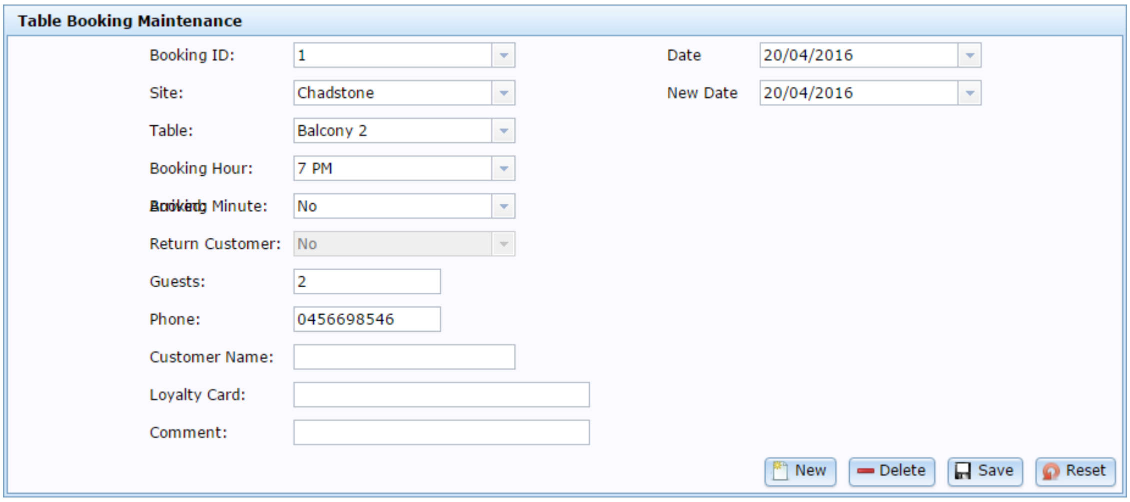


The Table Booking report is displayed.



3. Press the **Booking #** of the table booking you want to edit.

   The Table Booking Maintenance screen is displayed.



4. Make the required changes.

   See *Table Booking Maintenance screen* on page 53.

5. Press 

.

   The booking is edited.

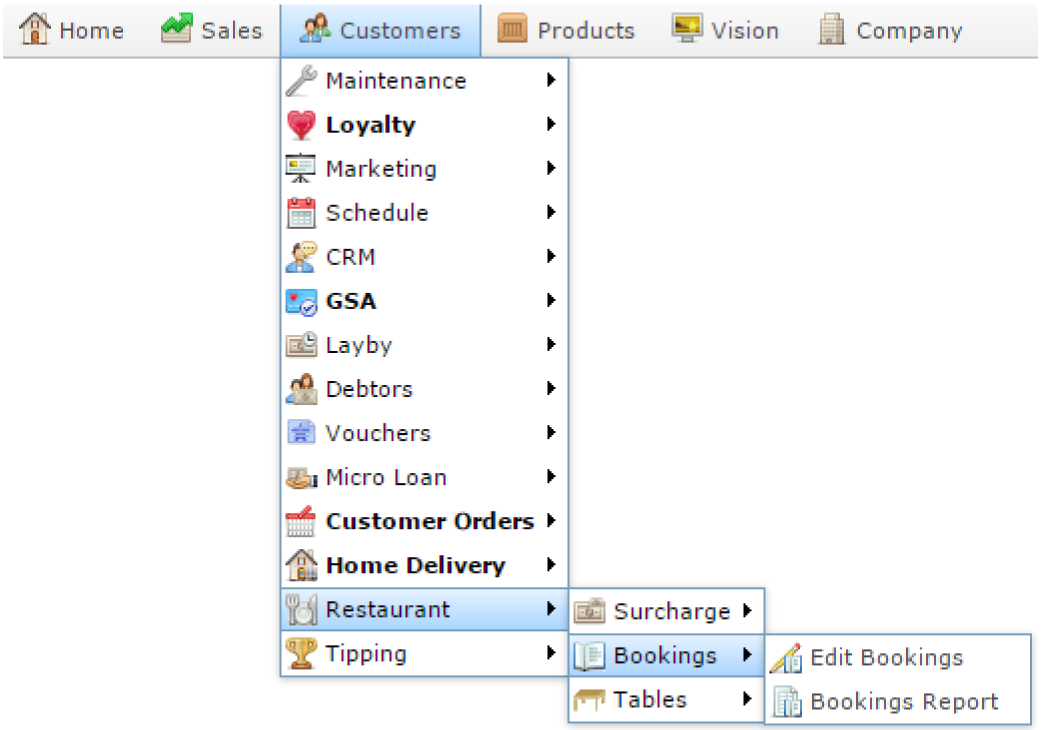
Deleting a table booking

Delete a table booking to cancel a booking.

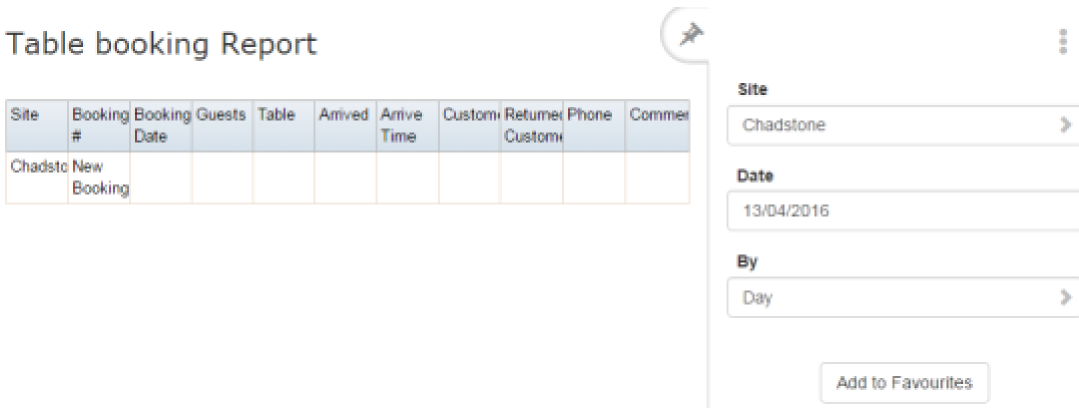
To delete a booking:

1. Press 

.
2. Press **Restaurant** > **Bookings** > **Bookings Report**.

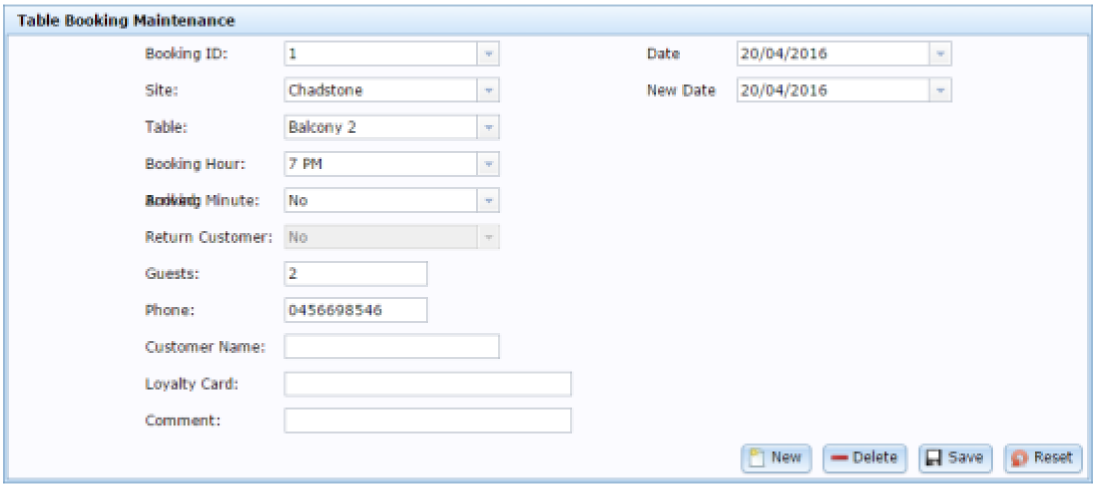


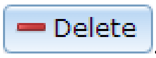
The Table Bookings report is displayed.



3. Press the **Booking #** of the table booking you want to delete.

The Table Booking Maintenance screen is displayed.



4. Press 

.

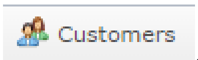
   The booking is deleted.

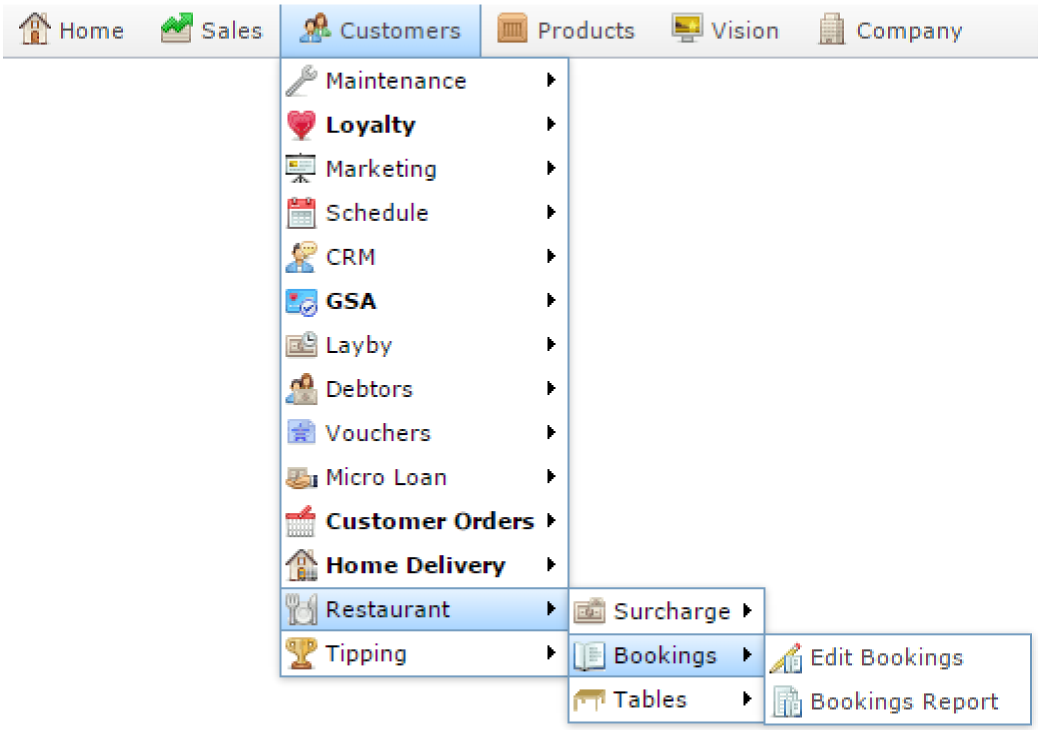
Table Booking report

Use the Table Booking report to view bookings of your tables.

Opening the Table Booking report

To open the Table Booking report:

1. Press 
.
2. Press **Restaurant > Bookings > Bookings Report**.



The Table Booking report is displayed.

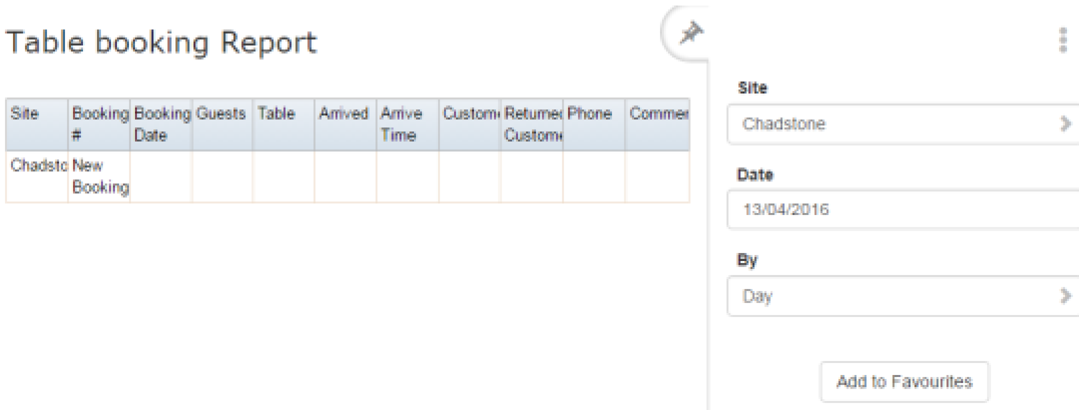


Table Booking report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or year.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site	Site the table belongs to.
Booking #	Unique code identifying the booking.
Booking Date	Date the table is booked.
Guests	Number of customers booked for the table.
ID / **Table # /** **Table**	Unique code identifying the table.
Arrived	Whether the customer has arrived.
Arrive Time	Time the customer arrived.
Customer	Name of the customer responsible for the table.

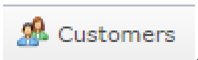
Field	Description
Return Customer	Whether the customer has booked and dined at your company before, **Note:** You can manually select this field when creating the booking.
Phone	The phone number of the customer in charge of the booking.
Comment	Any comment on the booking.

Table Booking Maintenance screen

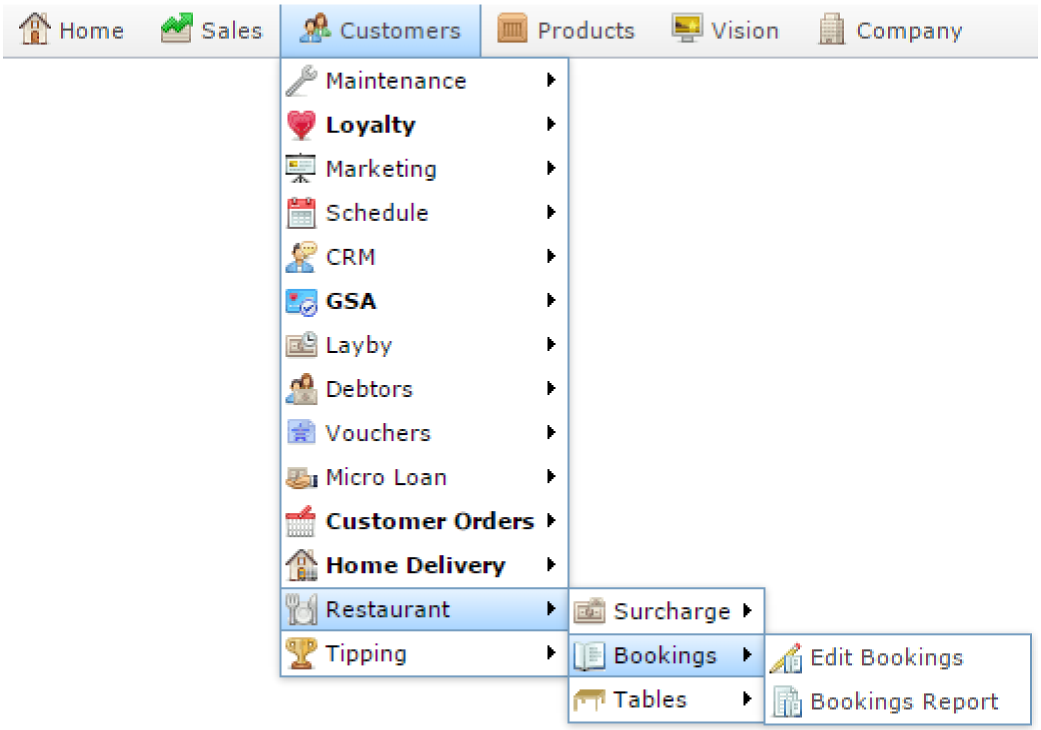
Use this screen to create bookings for tables, and specify customer details.

Opening the Table Booking Maintenance screen

To open the Table Booking Maintenance screen:

1. Press 

.
2. Press **Restaurant > Bookings > Edit Bookings**.



The Table Booking Maintenance screen is displayed.

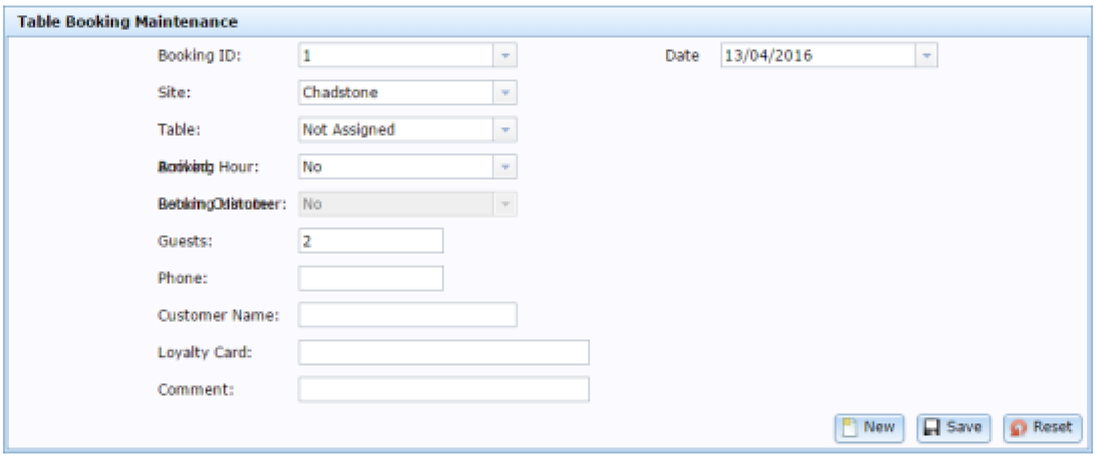


Table Booking Maintenance screen key fields and buttons

Field	Description
Booking ID	Unique number to identify the booking. **Note:** Select another **Booking ID** to view the information for another booking.
Date	Date the booking is for.
New Date	Date the booking is to be moved to.
Site	Site the booking is for.
Table	Table number that has been assigned to the booking.
Booking Hour	Hour of day the booking is for.
Booking Minute	Minute the booking is for. For example, if the booking is for 7:30, the **Booking Minute** is **30**.
Arrived	Select if the customer has arrived for their booking.
Return Customer	Select if this is a customer you have served before.

Field	Description
Guests	Type the number of people who will be dining in this booking, including the customer making the booking. **Tip:** This is also known as the number of **covers** for a booking.
Phone	Type the customer's contact phone number for the booking.
Customer Name	Type the name of the customer making the booking.
Loyalty Card	Type the customer's loyalty card number, if applicable.
Comment	Type any other comments on the customer's booking, such as dietary or access requirements.
New	Press to create a new booking.
Save	Press to save any changes to the current booking.
Reset	Press to undo any changes to the current booking since it was last saved.

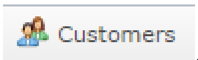
Table Tracking Detail report

Use the Table Tracking Detail report to view the status of items that have not been delivered to tables yet. This information is pulled from the Point of Sale or bump screen.

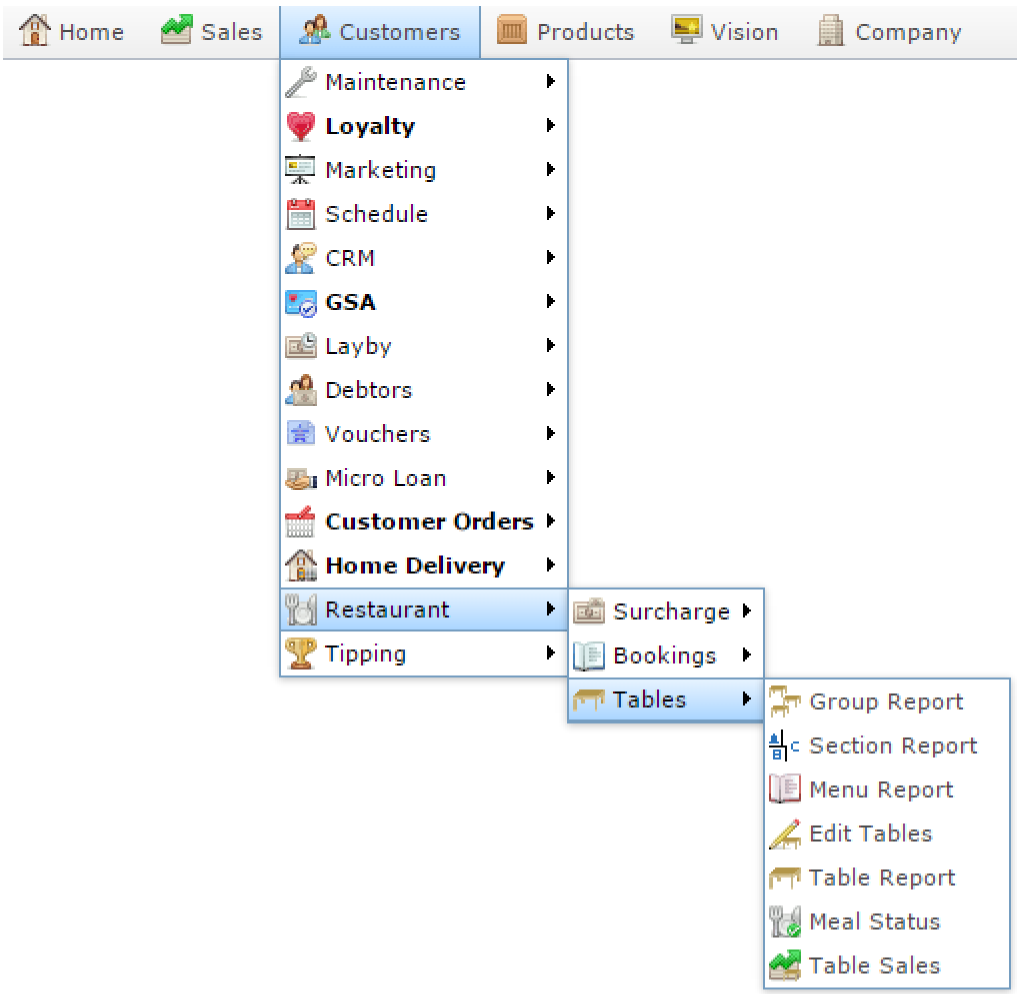
> **Note:** If you want to be able to view up-to-date information on the tables from the Portal, set the **Mirror Table Items** and **Mirror Table Status** fields to **1** in the POS Ini File screen, under the **Company > Site > Management > POS Ini File** menu option.

Opening the Table Tracking Detail report

To open the Table Tracking Detail report:

1. Press 

.
2. Press **Restaurant** > **Table** > **Meal Status**.



The Table Tracking Detail report is displayed.

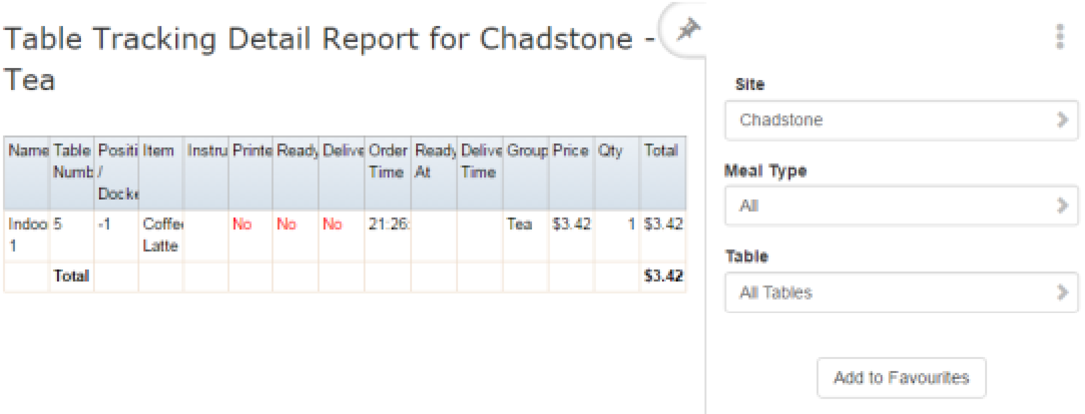


Table Tracking Detail Report for Chadstone - Tea

Name	Table Numb	Positi / Docke	Item	Instru	Printe	Ready	Delive	Order Time	Ready At	Delive Time	Group	Price	Qty	Total
Indoo 1	5	-1	Coffee Latte		No	No	No	21:26			Tea	$3.42	1	$3.42
	Total													**$3.42**

Table Tracking Detail report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Meal Type	Select the menu area to filter the report to.
Table	Select a table to filter the report to.
Set Automatic Mode On / Off	Press to set the report to automatically refresh every minute. **Note:** If **Set Automatic Mode On** is displayed, then automatic mode is currently off, and the report does not automatically refresh. If **Set Automatic Mode Off** is displayed, then automatic mode is on, and the report refreshes itself every minute.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name	Description of the table.
Table Number	Unique number identifying the table.
Position / Docket	Position or docket number of the order.
Item	Item ordered.
Instructions	Additional instructions included in order.
Printed	Whether the order has been printed in the kitchen.
Ready	Whether the order is ready.
Delivered	Whether the order has been delivered.
Order Time	The time the item was ordered.
Ready At	The time the item was ready for delivery.

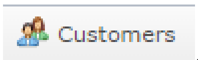
Field	Description
Delivery Time	The time the item was delivered.
Group	The menu group the item belongs to.
Price	The price of the item.
Qty	The number of units of the item that were ordered.
Total	The total cost of the item order.

Table Sales report

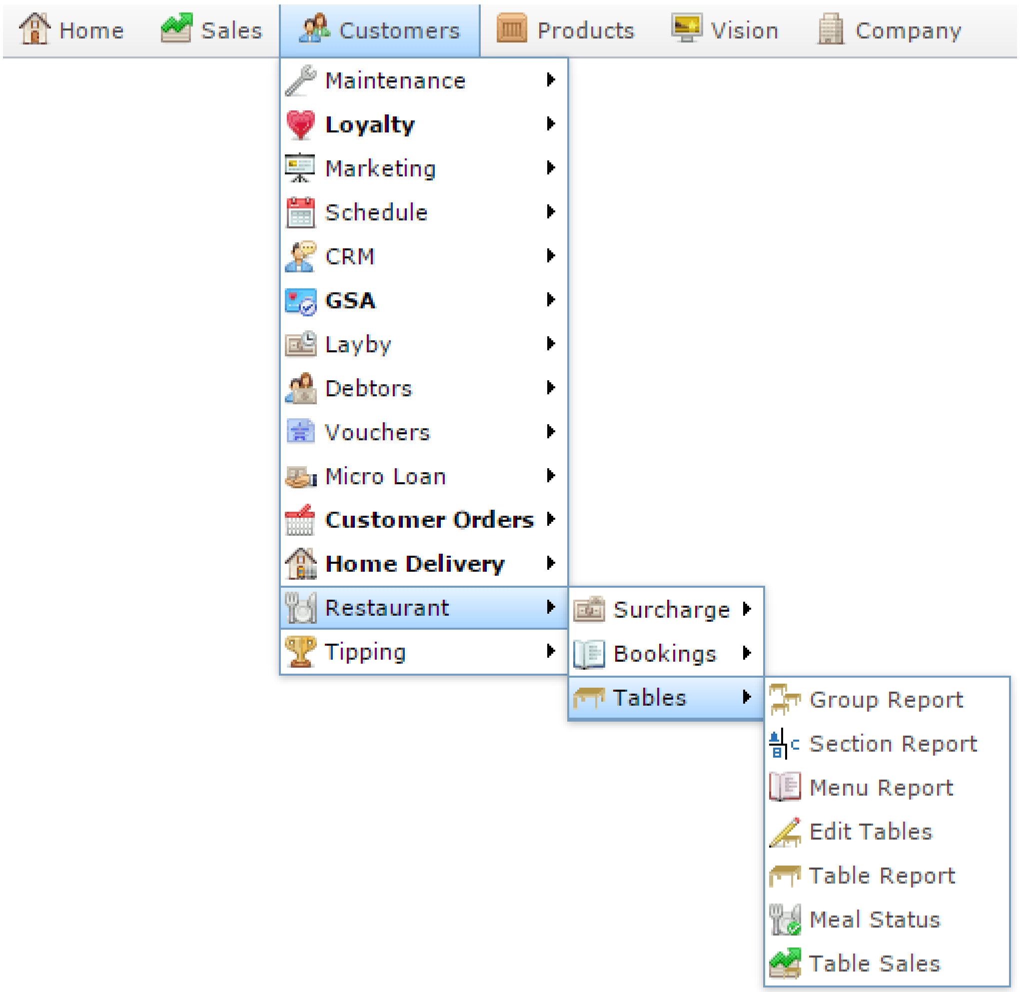
Use the Table Sales report to view the sales for each table in your table service.

Opening the Table Sales report

To open the Table Sales report:

1. Press 

.
2. Press **Restaurant** > **Table** > **Table Sales**.



The Table Sales report is displayed.

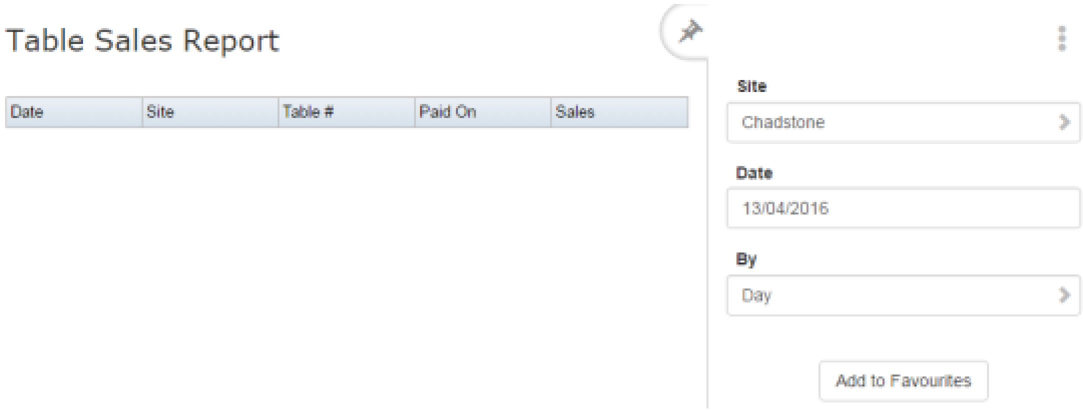


Table Sales Report
Date
Site
Table #
Paid On
Sales
Site
Chadstone
Date
13/04/2016
By
Day
Add to Favourites

Table Sales report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
By	Select to display the report for a specific day, week or month.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.

Report area

This area displays report information.

> **Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

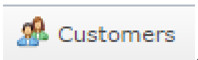
Field	Description
Date	Date the table sale occurred.
Site	Site the table belongs to.
ID / **Table # /** **Table**	Unique code identifying the table.
Paid On	Date the transaction was paid for.
Sales	Total of the transaction that occurred on this table per sale.

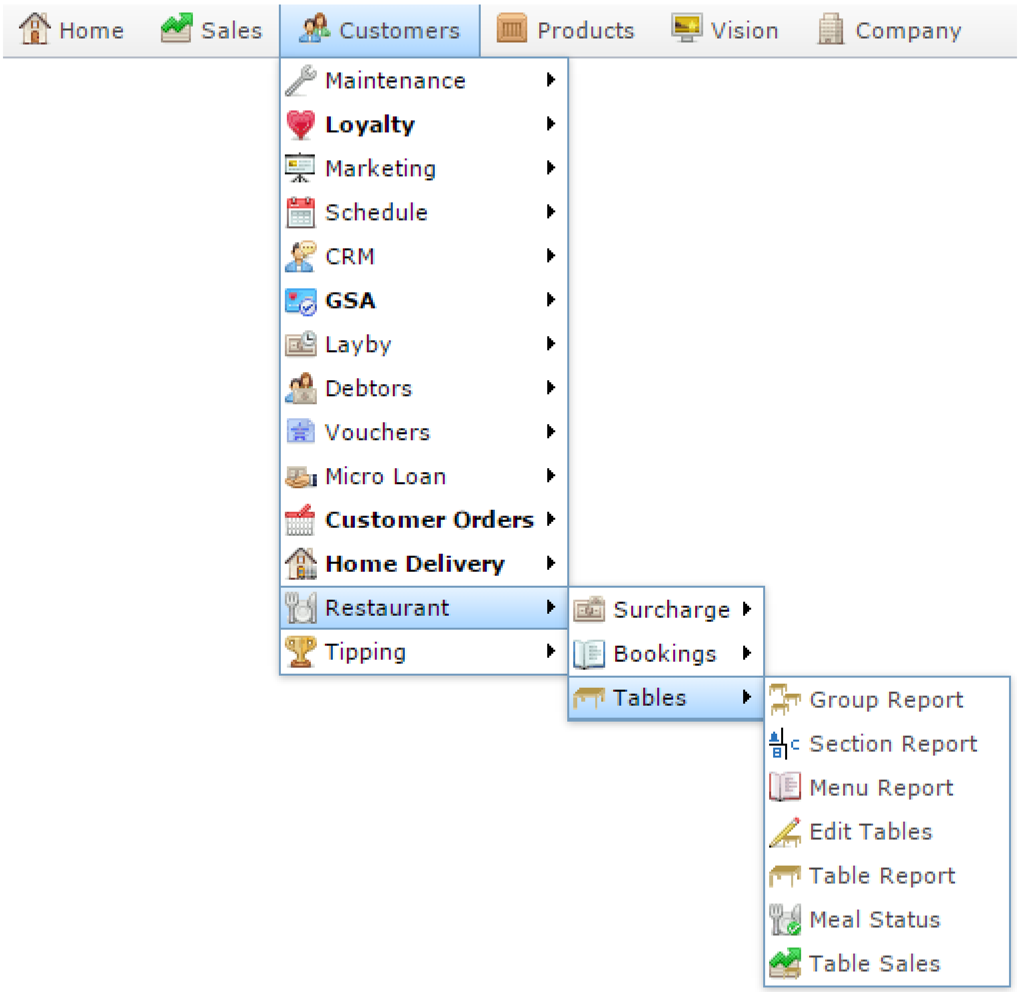
Table Tracking report

Use the Table Tracking report to view, track the use of tables in your table service.

Opening the Table Tracking report

To open the Table Tracking report:

1. Press 
.
2. Press **Restaurant** > **Table** > **Table Report**.



The Table Tracking report is displayed.

Table Tracking Report

Site	Table	Positions	Status	Customer	Comment	Balance
Chadstone	Balcony 1	2	Free			
Chadstone	Balcony 2	4	Free			
Chadstone	Balcony 3	4	Free			
Chadstone	Balcony 4	2	Free			
Chadstone	Indoor 1	4	Free	Sam		$3.42
Chadstone	Indoor 2	4	Free			
Chadstone	Indoor 3	4	Free			
Chadstone	Indoor 4	4	Free			
Chadstone	Indoor 5	6	Free			
Chadstone	Indoor 6	6	Free			
Chadstone	Outdoor 1	8	Free			
Chadstone	Outdoor 2	10	Free			

Site

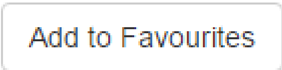
Chadstone

Add to Favourites

Table Tracking report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

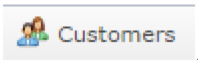
Field	Description
Site	Site the table belongs to.
Table / Description	Description of the table being reported on.
Positions	Number of people who can sit at this table.
Status	Whether the table is currently occupied. This status is dictated by activity on the Point of Sale.
Customer	Name of the customer responsible for the table.
Comment	Any comment on the table. **Note:** This field is not used with the iZen Point of Sale.
Balance	The amount owed by the customer on that table.

Surcharge Maintenance screen

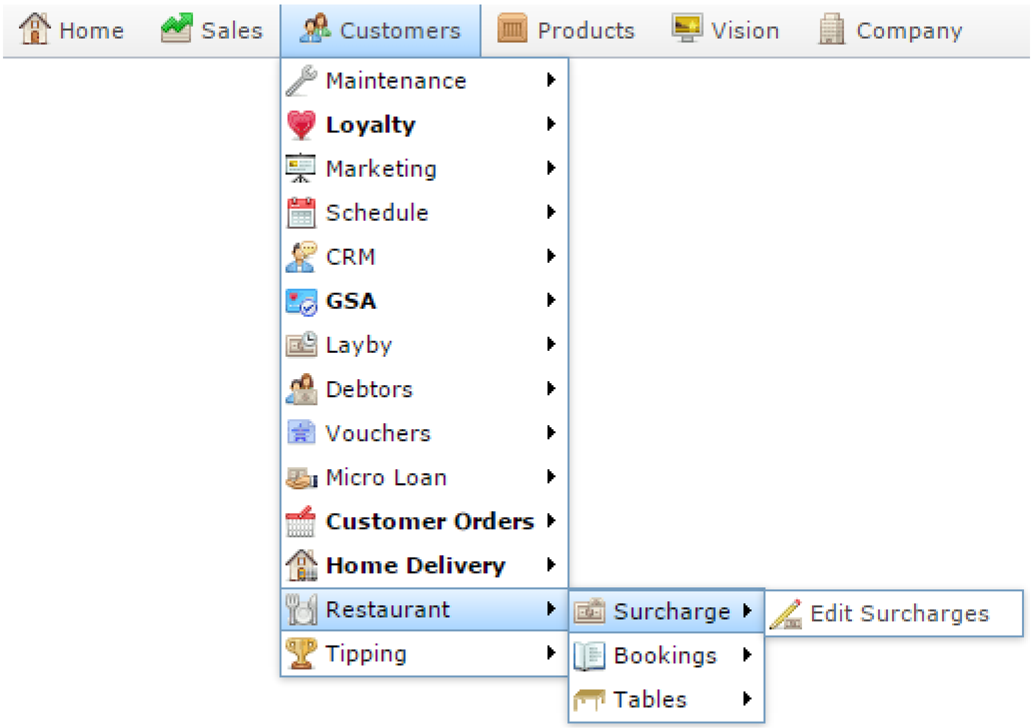
Use this screen to control the surcharges added to your prices on specific dates.

Opening the Surcharge Maintenance screen

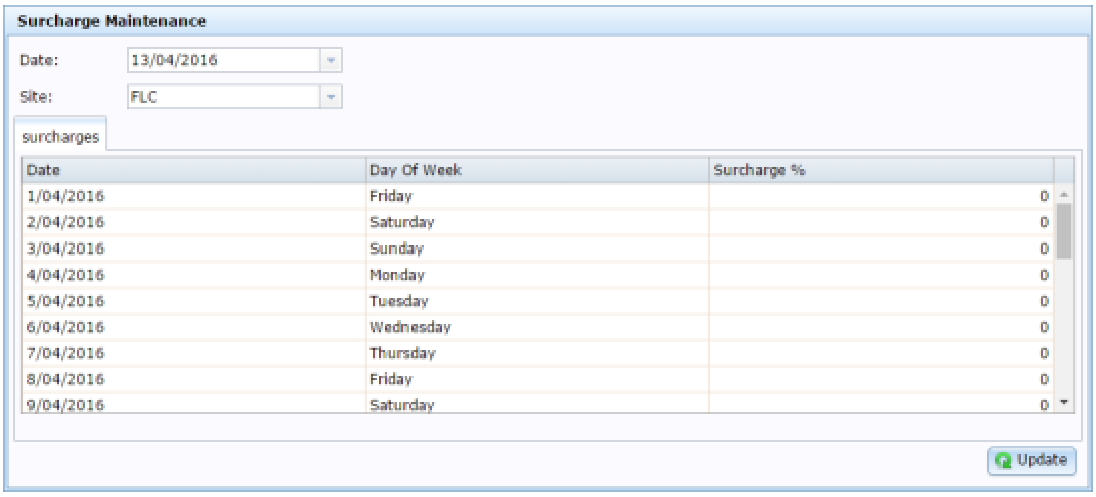
To open the Surcharge Maintenance screen:

1. Press 

.
2. Press **Restaurant > Surcharge > Edit Surcharges**.



The Surcharge Maintenance screen is displayed.



Surcharge Maintenance screen key fields and buttons

Field	Description
Date	Date the surcharge is applied.
Site	Site the surcharges apply to.
Day of Week	Day of the week the surcharge is applied.
Surcharge %	Percentage of the transaction total to apply as a surcharge.

Search for Customer Home Delivery report

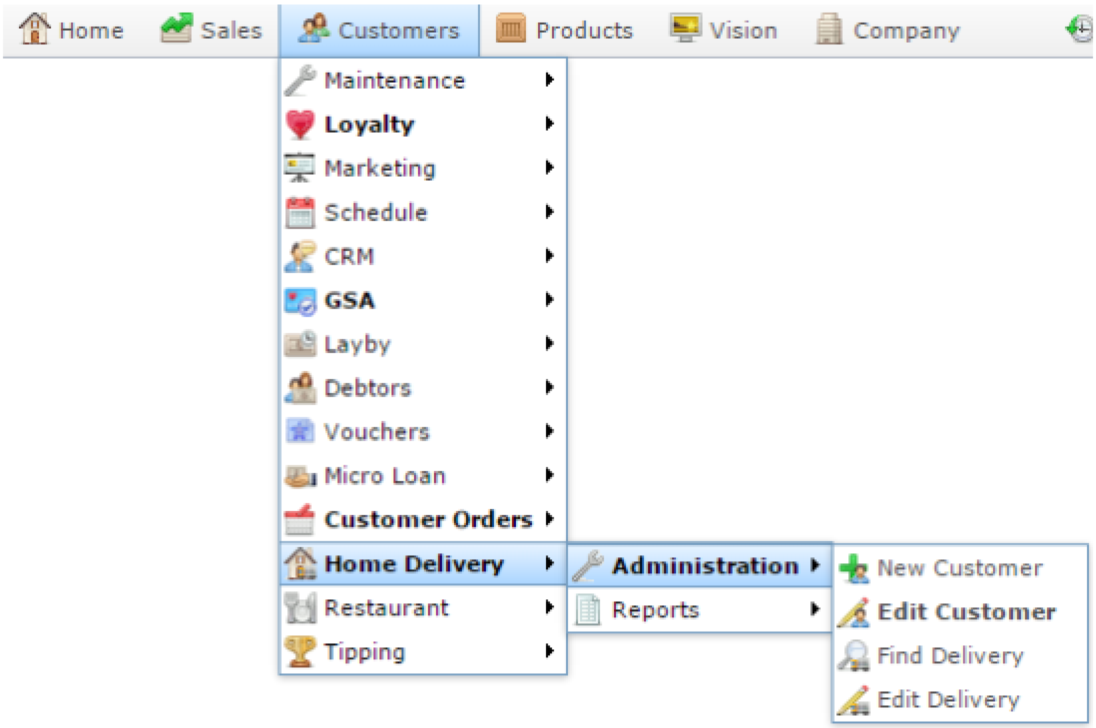
Use the Search for Customer Home Delivery report to search for home deliveries.

Opening the Search for Customer Home Delivery report

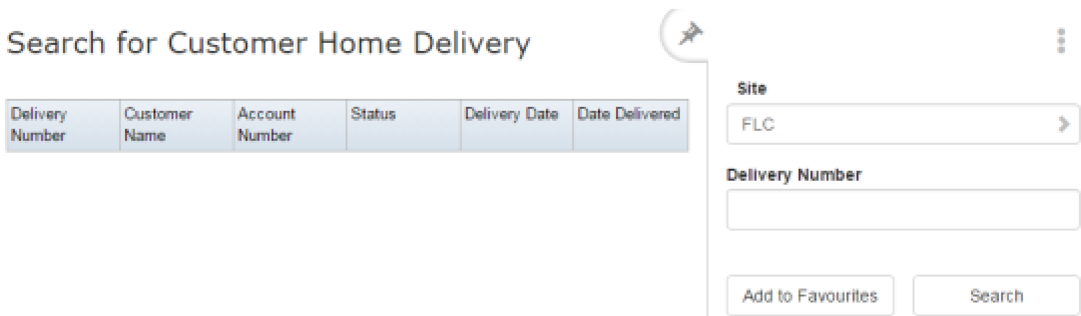
To open the Search for Customer Home Delivery report:

1. Press 

from the menu bar.
2. Press **Home Delivery** > **Administration** > **Find Delivery**.



The Search for Customer Home Delivery report is displayed.



Search for Customer Home Delivery report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Delivery Number	Type a delivery number to search for.
Search	Press to search for deliveries that match your criteria.

Report area

This area displays report information.

> **Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name / **Customer /** **Customer Name /** **Debtor**	Name of the debtor or customer.
Debtor Code/ **Customer Code /** **Number /** **Account**	Unique code identifying the debtor.
Delivery # / **Delivery Number**	Unique code identifying the delivery order.
Delivery Date	Date the order is scheduled to be delivered.
Status	Status of the delivery order.
Date Delivered	Date the delivery was actually made, if applicable.

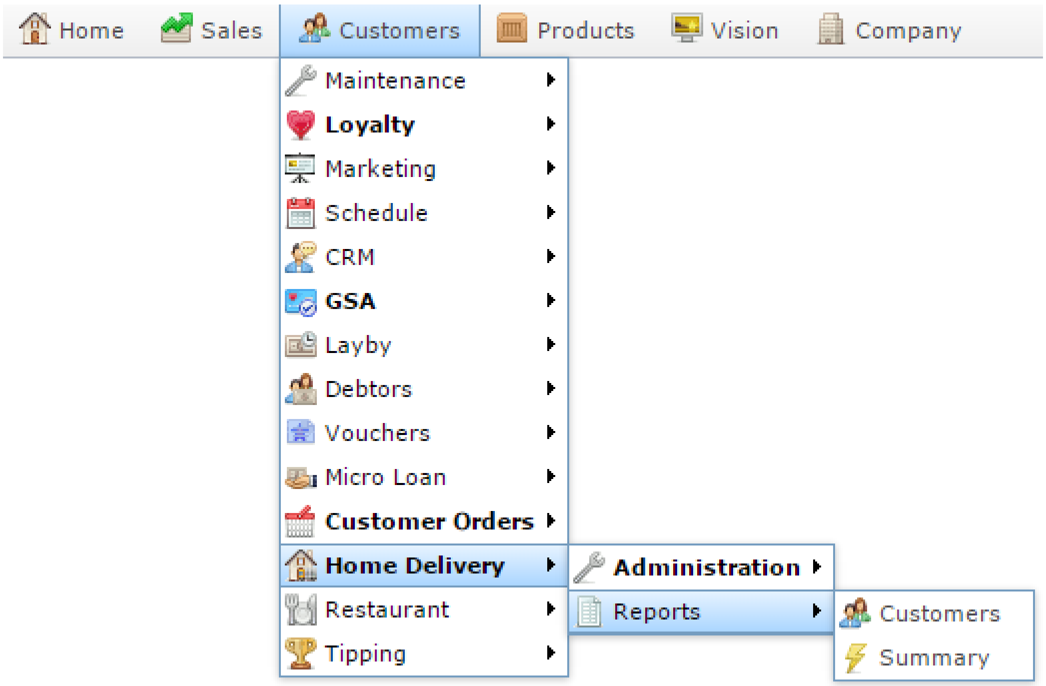
Customer Home Delivery Details report

Use the Customer Home Delivery Details report to view the names and addresses of customers that have used your home delivery service.

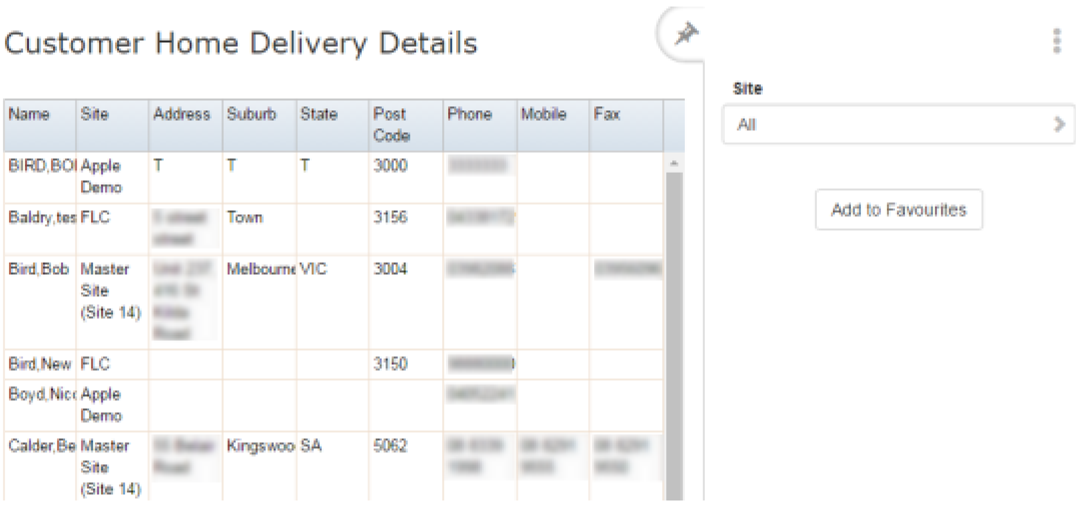
Opening the Customer Home Delivery Details report

To open the Customer Home Delivery Details report:

1. Press  from the menu bar.
2. Press **Home Delivery** > **Reports** > **Customers**.



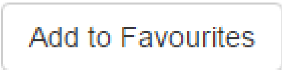
The Customer Home Delivery Details report is displayed.



Customer Home Delivery Details report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Name / Customer / Customer Name / Debtor	Name of the debtor or customer.
Address	Customer's address.
Suburb	Customer's suburb.
State	Customer's state.
Post Code	Customer's post code.
Phone	Customer's phone number.
Mobile	Customer's mobile number.

Field	Description
Fax	Customer's fax number.

Customer Order report

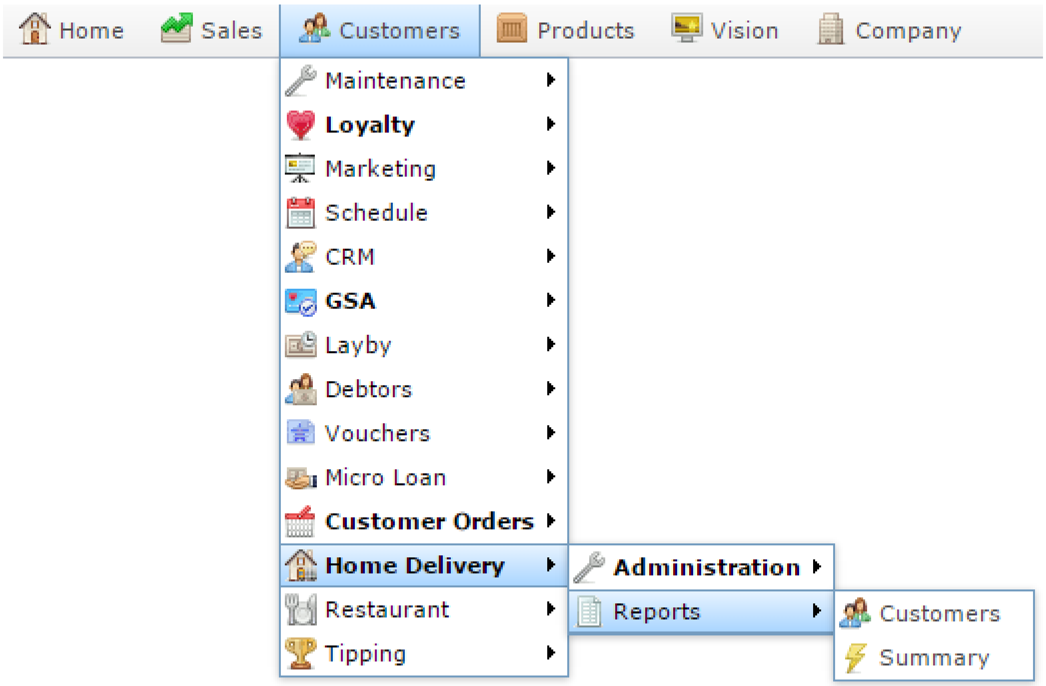
Use the Customer Order report to view customer home delivery orders.

Opening the Customer Order report

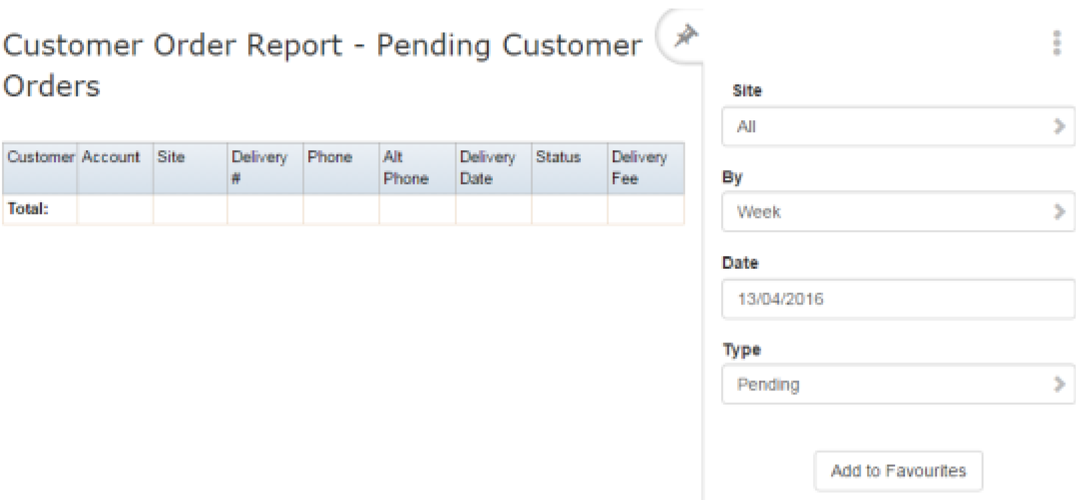
To open the Customer Order report:

1. Press  from the menu bar.

2. Press **Home Delivery** > **Reports** > **Summary**.



The Customer Order report is displayed.



Customer Order report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
By	Select to display the report for a specific day, week or month.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.
Type	Select to filter the report to customers' home delivery orders that are: ▪ Pending. ▪ Delivered. ▪ All customer orders.

Report area

This area displays report information.

> **Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / **Description**	The name of the relevant site.
Name / **Customer /** **Customer Name /** **Debtor**	Name of the debtor or customer.
Debtor Code/ **Customer Code /** **Number /** **Account**	Unique code identifying the debtor.
Phone	Customer's phone number.
Alt Phone	Second phone number for customer in case the first is not reachable during delivery.

Field	Description
Delivery # / **Delivery Number**	Unique code identifying the delivery order.
Delivery Date	Date the order is scheduled to be delivered.
Status	Status of the delivery order.
Delivery Fee	Fee charged for the delivery.

Managing item options and modifiers

You can add modifiers to items at the moment of purchase to record slight differences in the item, or customer requests. Item modifications are created just like normal items in the Portal and can be stocked, tracked, priced and managed just like normal items.

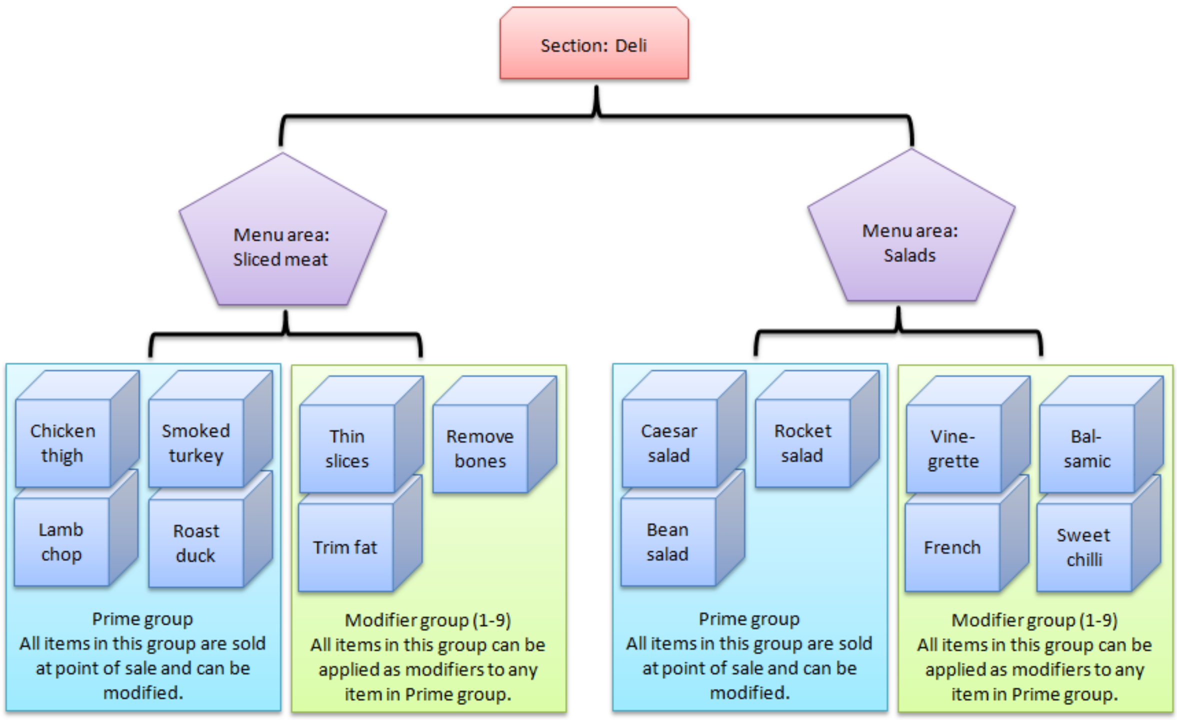
> **Note:** To modify items, you must have table service enabled. See *Enabling table service in the* .

Menu areas and modifier groups

Item modifications use groups that are called menu areas. Items are classified as either:

- Prime items, which are the items that are sold at the Point of Sale.
- Modifier items, which modify the prime items.

A menu area contains both prime and modifier items. Any and all modifier items within a menu area can be added to any of the prime items within that same group.



You can add as many items as you want to a single menu area, but items can only belong to one menu area, and a modifier from one menu area cannot be added to an item from a different menu area. This means you need to construct your menu areas carefully to group your items by the modifiers they share. An item can also only be a prime item or a modifier item; it cannot be both.

Tip: If you have a modifier item that you need to add to multiple menu areas, you can create a separate item for each menu area and use referrals to relate them all to the same 'stock' item. See *Managing kits and referrals*.

Sections

Sections are a means of grouping your menu areas. While the iZen Point of Sale does not distinguish by section, PDTs list menu areas by section to help structure the available options in a small screen space. If you are not using PDTs, sections are not important unless you want to group various menu areas together for reporting reasons.

What you can do:

- *Creating a table section* on page 18.
- *Creating a menu area* on page 84.
- *Creating a prime item* on page 96.
- *Creating a modifier item* on page 99.

Also see

- *Table Section Report* on page 24.
- *Table Section Maintenance screen* on page 26.
- *Table Menu Report* on page 90.
- *Table Menu Maintenance screen* on page 93.
- *Inventory Management - Table / Home tab*.

Creating a menu area

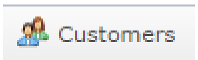
Create a menu area to either:

- Create a menu category such as Entrees, Soups or Mains.
- Group a set of modifier items with the prime items that they modify.

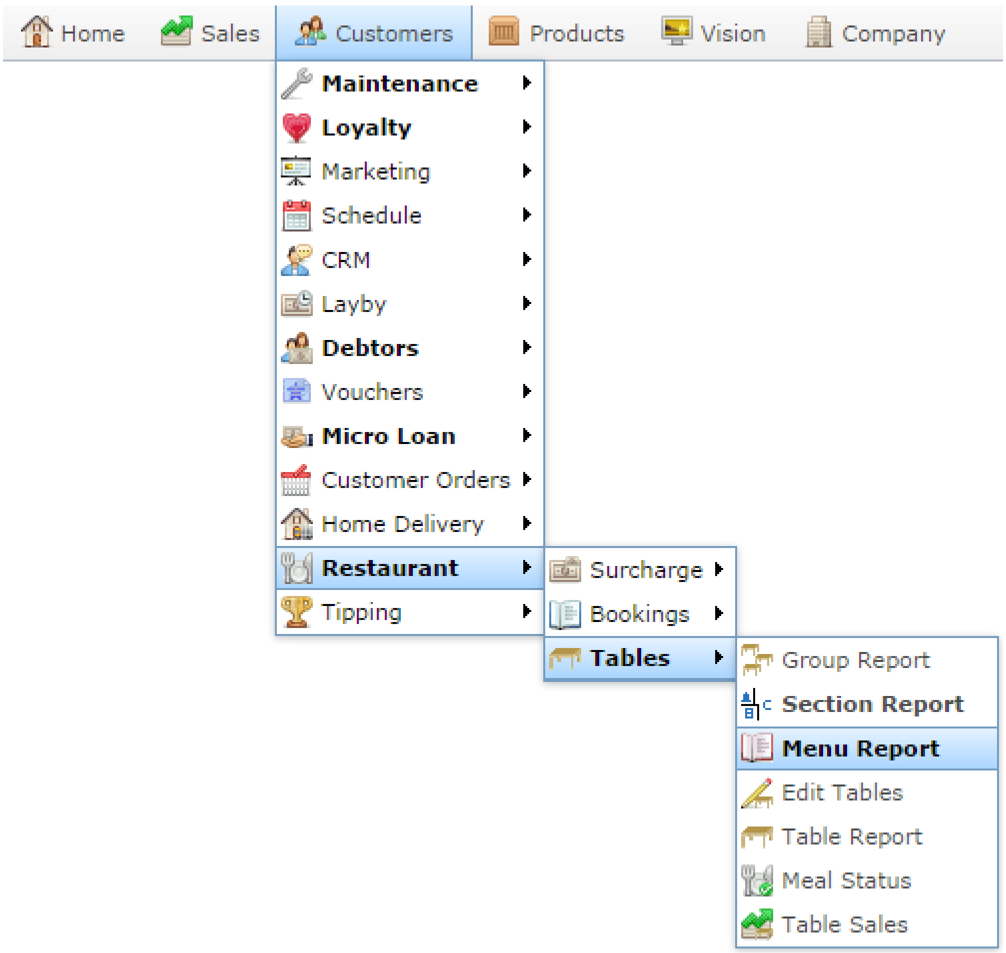
Menu areas sit within a table section. See *Creating a table section* on page 18.

Note: All modifier items included in this menu group can be applied to any prime item included in this group. Items can only be included in one menu area.

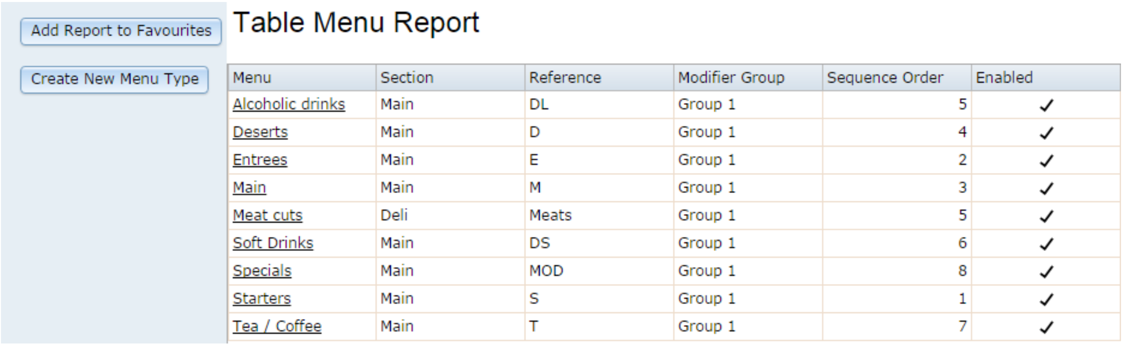
To create a menu area:

1. Press 

in the main menu bar.
2. Press **Restaurant** > **Tables** > **Menu Report**.



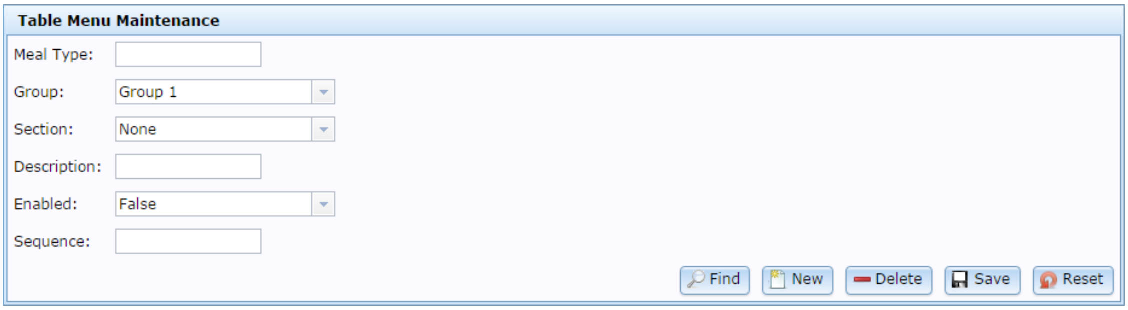
The Table Menu Report is displayed.



Menu	Section	Reference	Modifier Group	Sequence Order	Enabled
Alcoholic drinks	Main	DL	Group 1	5	✓
Deserts	Main	D	Group 1	4	✓
Entrees	Main	E	Group 1	2	✓
Main	Main	M	Group 1	3	✓
Meat cuts	Deli	Meats	Group 1	5	✓
Soft Drinks	Main	DS	Group 1	6	✓
Specials	Main	MOD	Group 1	8	✓
Starters	Main	S	Group 1	1	✓
Tea / Coffee	Main	T	Group 1	7	✓

3. Press Create New Menu Type.

   The Table Menu Maintenance screen is displayed.



4. Type a name for the menu area in the **Meal Type** field.

> **Tip:** The modifier group does not affect the menu area. You can leave the Group field set at Group 1.

5. Select the table **Section** from the drop-down list.

> **Note:** If you need to create a section, see *Creating a table section* on page 18.

6. Type a **Description** for the menu area.
7. Select True from the **Enabled** drop-down list.
8. Type a **Sequence** number to control the order the menu area appears in on a PDT.
9. Press Save.

   The menu area is created. You can now add items to the menu area.

   Creating a prime item on page 96.

   Also see *Creating a modifier item* on page 99.

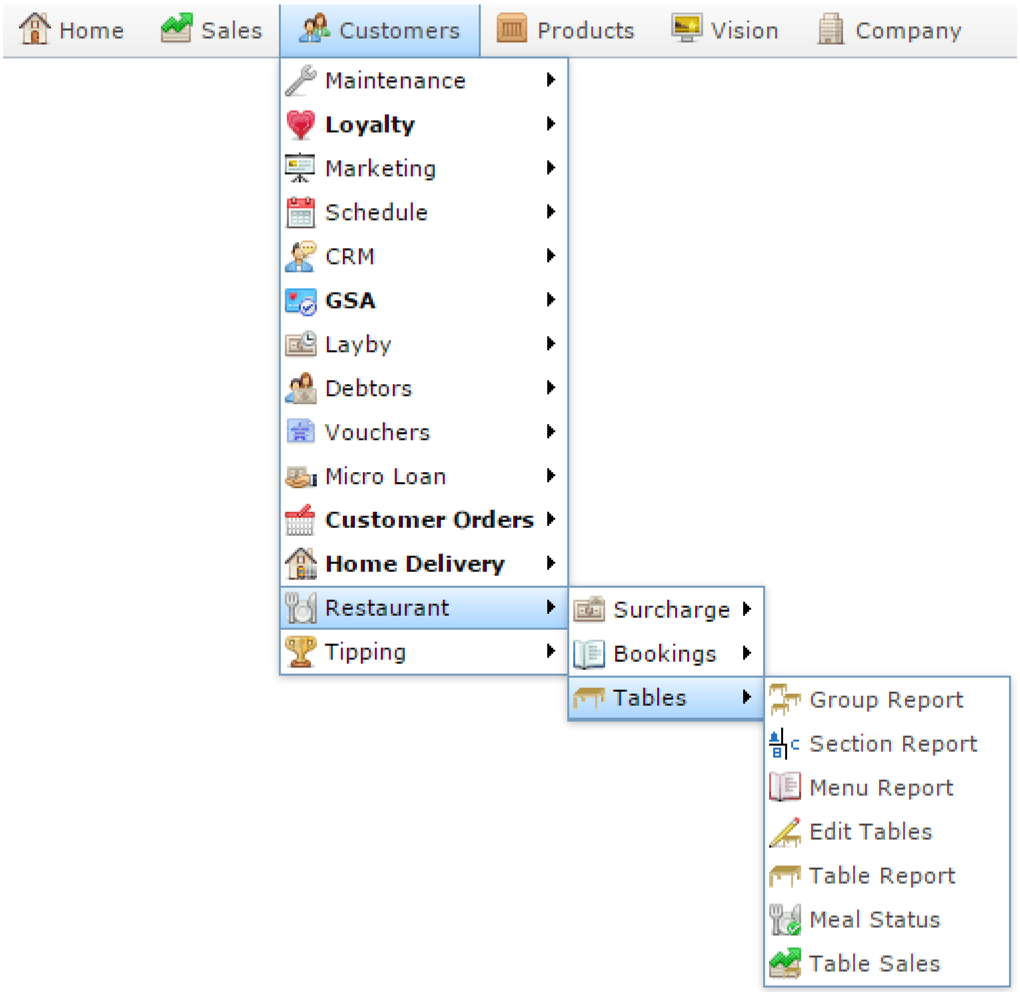
Editing a menu area

Edit a menu area to enable or disable it, or change the description or order.

To edit a menu area:

1. Press .

2. Press **Restaurant** > **Table** > **Menu Report**.



The Table Menu report is displayed.

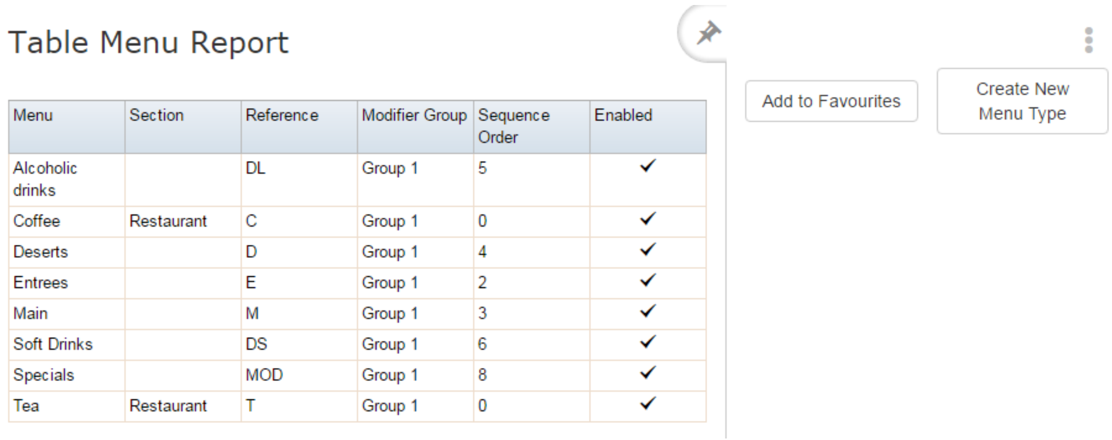


Table Menu Report

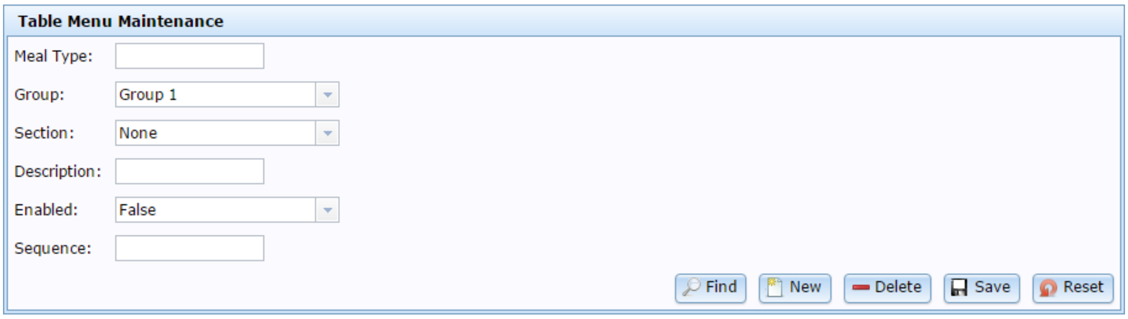
Add to Favourites

Create New Menu Type

Menu	Section	Reference	Modifier Group	Sequence Order	Enabled
Alcoholic drinks		DL	Group 1	5	✓
Coffee	Restaurant	C	Group 1	0	✓
Deserts		D	Group 1	4	✓
Entrees		E	Group 1	2	✓
Main		M	Group 1	3	✓
Soft Drinks		DS	Group 1	6	✓
Specials		MOD	Group 1	8	✓
Tea	Restaurant	T	Group 1	0	✓

3. Press the **Description** of the menu area you want to open.

   The Table Menu Maintenance screen is displayed.



4. Make the required changes.

   See *Table Menu Maintenance screen* on page 93.

5. Press Save.

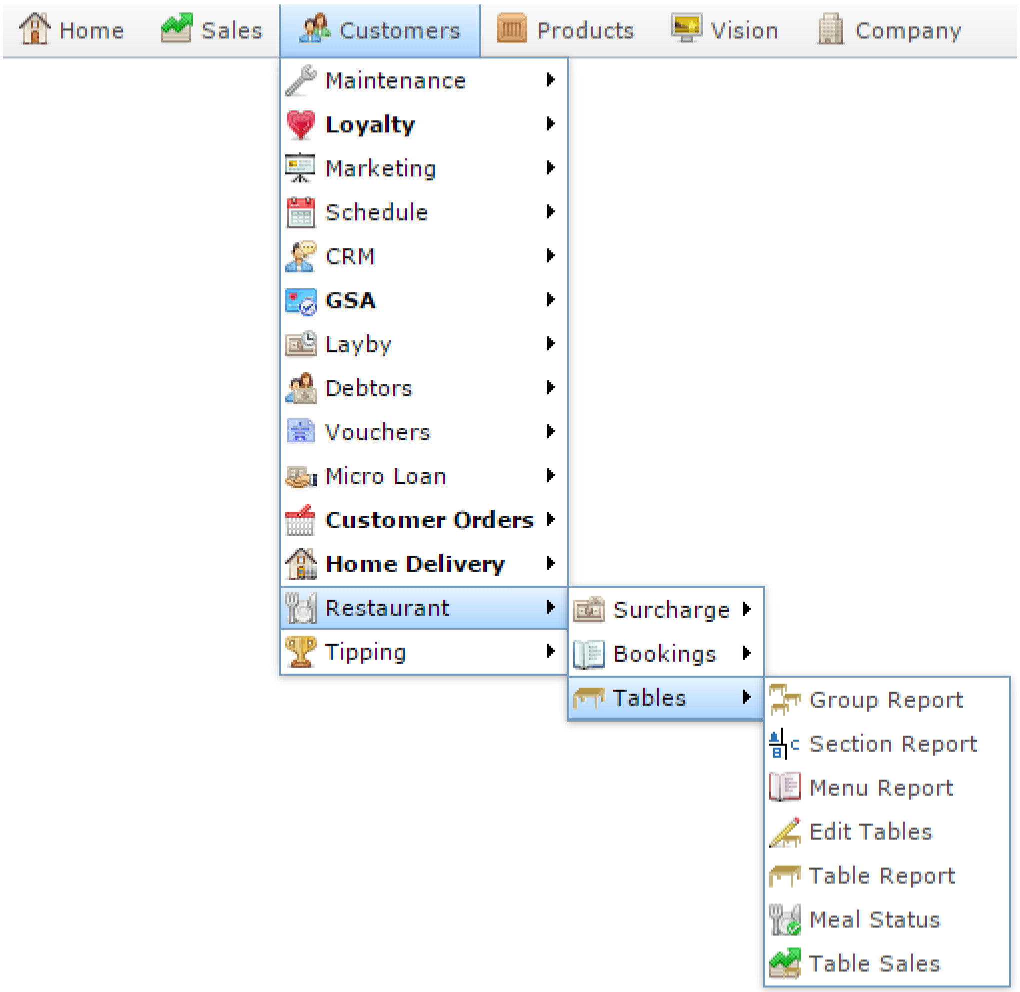
   The menu area is edited.

Deleting a menu area

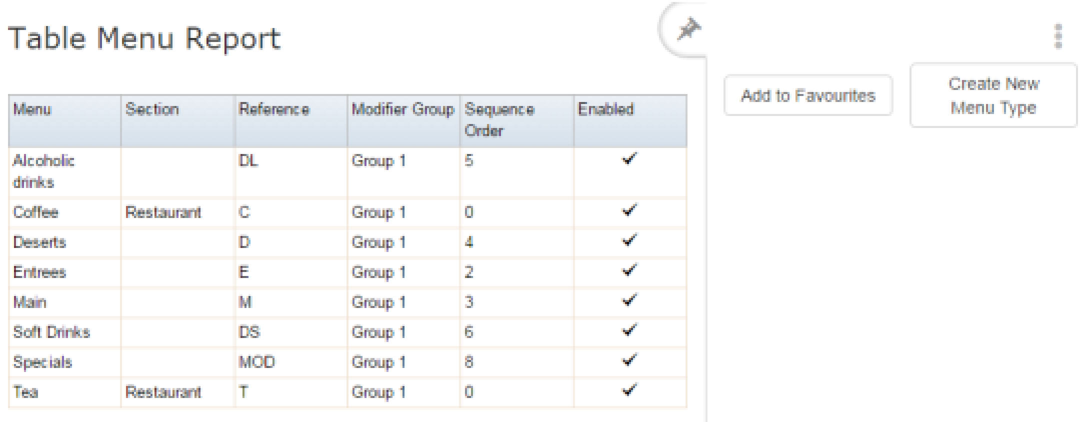
Delete a menu area to remove it from the Portal's table service.

To Delete a menu area:

1. Press  .
2. Press **Restaurant** > **Table** > **Menu Report**.



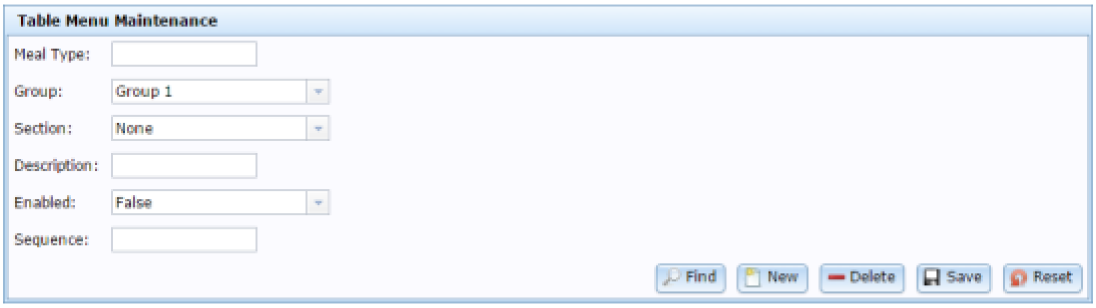
The Table Menu report is displayed.

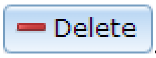


Menu	Section	Reference	Modifier Group	Sequence Order	Enabled
Alcoholic drinks		DL	Group 1	5	✓
Coffee	Restaurant	C	Group 1	0	✓
Deserts		D	Group 1	4	✓
Entrees		E	Group 1	2	✓
Main		M	Group 1	3	✓
Soft Drinks		DS	Group 1	6	✓
Specials		MOD	Group 1	8	✓
Tea	Restaurant	T	Group 1	0	✓

3. Press the **Description** of the menu area you want to open.

   The Table Menu Maintenance screen is displayed.



4. Press 
.

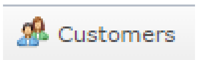
   The menu area is deleted.

Table Menu Report

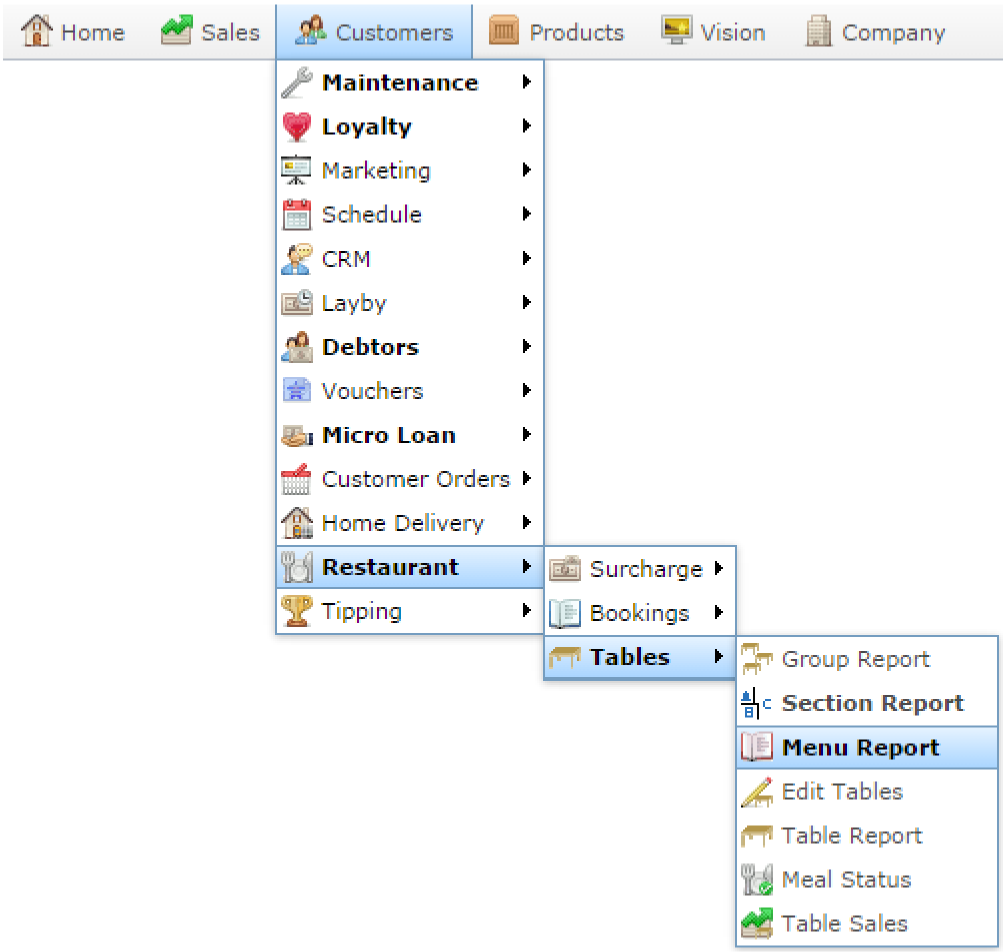
Use the Table Menu Report to view information on menu areas and open the Table Menu Maintenance screen to edit menu areas.

Opening the Table Menu Report

To open the Table Menu Report:

1. Press 

in the main menu bar.
2. Press **Restaurant** > **Tables** > **Menu Report**.



The Table Menu Report is displayed.

Add Report to Favourites

Create New Menu Type

Table Menu Report

Menu	Section	Reference	Modifier Group	Sequence Order	Enabled
Alcoholic drinks	Main	DL	Group 1	5	✓
Deserts	Main	D	Group 1	4	✓
Entrees	Main	E	Group 1	2	✓
Main	Main	M	Group 1	3	✓
Meat cuts	Deli	Meats	Group 1	5	✓
Soft Drinks	Main	DS	Group 1	6	✓
Specials	Main	MOD	Group 1	8	✓
Starters	Main	S	Group 1	1	✓
Tea / Coffee	Main	T	Group 1	7	✓

Table Menu Report key fields and buttons

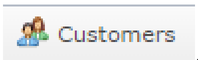
Field	Description
Add to Favourites	Add this report to your Portal favourites.
Create New Menu Type	Create a new menu area. See *Creating a menu area* on page 84.
Menu	Name of the menu area. Press to edit the menu area in the Table Menu Maintenance screen. See *Table Menu Maintenance screen* on page 93.
Section	Table section of the menu area. See *Table Section Maintenance screen* on page 26.
Reference	Short reference generated by the Portal for use on the PDT.
Modifier Group	This field is not in use.
Sequence Order	Number used to control the order the menu area appears in PDTs. Lower numbers appear first.
Enabled	If selected, this menu area is available for use within the Portal.

Table Menu Maintenance screen

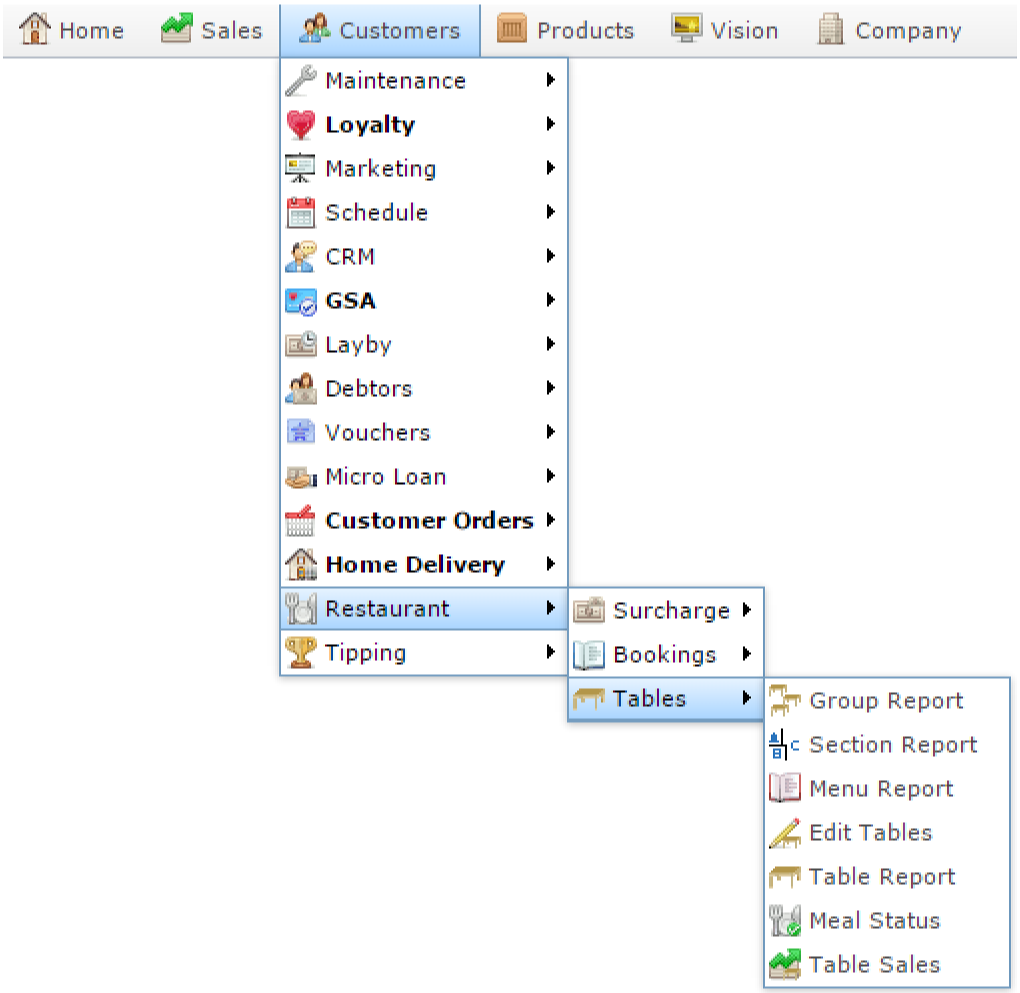
Use the Table Menu Maintenance screen to create and modify menu areas for item modification.

Opening the Table Menu Maintenance screen

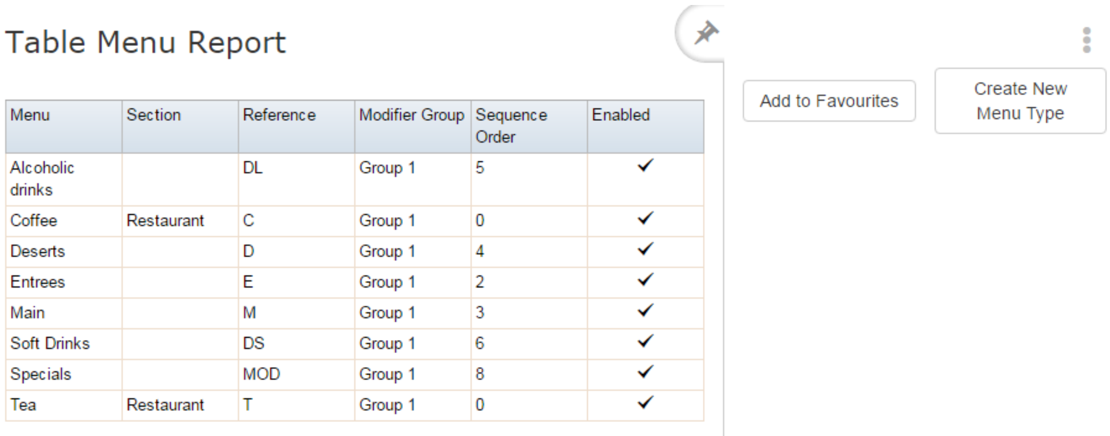
To open the Table Menu Maintenance screen:

1. Press 

.
2. Press **Restaurant** > **Table** > **Menu Report**.



The Table Menu report is displayed.



Menu	Section	Reference	Modifier Group	Sequence Order	Enabled
Alcoholic drinks		DL	Group 1	5	✓
Coffee	Restaurant	C	Group 1	0	✓
Deserts		D	Group 1	4	✓
Entrees		E	Group 1	2	✓
Main		M	Group 1	3	✓
Soft Drinks		DS	Group 1	6	✓
Specials		MOD	Group 1	8	✓
Tea	Restaurant	T	Group 1	0	✓

3. Press the **Description** of the menu area you want to open.

   The Table Menu Maintenance screen is displayed.

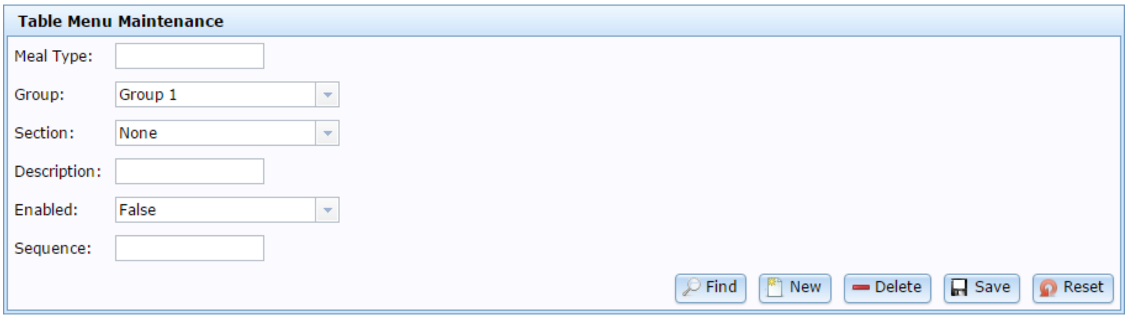


Table Menu Maintenance screen key fields and buttons

Field	Description
Meal Type	The name of the menu area.
Group	This field is not in use.
Section	Select the table section this menu area is available to. This only affects PDTs. See *Table Section Maintenance screen* on page 26.
Description	Type a description of the menu area.

Field	Description
Enabled	Select **True** to make this menu area available for use on the Portal.
Sequence	Type a number to determine the order that this menu item appears on the PDT. Lower numbers appear higher.
Find	Return to the Table Menu Report. See *Table Menu Report* on page 90.
New	Create a new menu area. See *Creating a menu area* on page 84.
Delete	Delete the menu area.
Save	Save changes to the menu area.
Reset	Revert any unsaved changes to the menu area.

Creating a prime item

Create a prime item to:

- Include it in a menu area such as "Soups" or "Desserts".
- Allow options to be added to it, such as preparation methods or other additional requests.

Prime items are sold directly in the Point of Sale. If you want to create an item to modify another item, see *Creating a modifier item* on page 99.

Note: If you are providing table service to customers, prime items are items that appear on the menu, such as a meal, side-order or drink.

Note: In order to create an item that can be modified, you must have table service enabled, and a table section and menu area configured. See *Creating a table section* on page 18. Also see *Creating a menu area* on page 84.

To create a prime item:

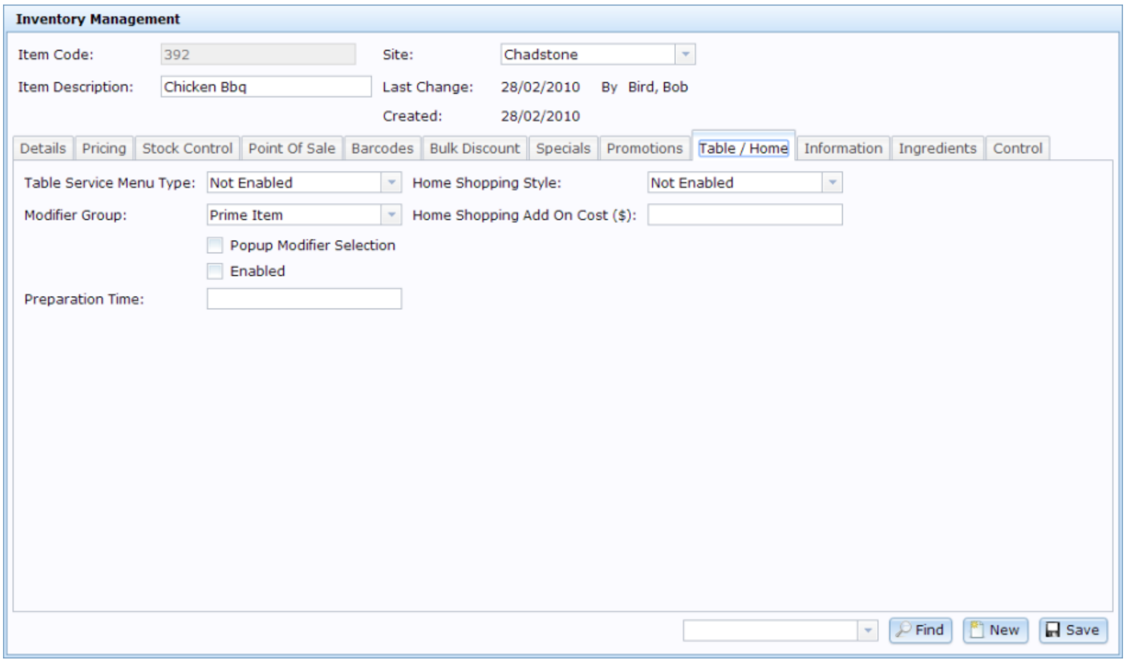
1. Find or create the item you want to be a prime item.

   See *Finding an item using the search screen*.

   Also see *Creating a new item*.

2. In Inventory Maintenance, press the Table/Home tab.

   The Table / Home tab is displayed.

   See *Inventory Management - Table / Home tab*.

3. Select the menu area you want the prime item to use from the **Table Service Menu Type** drop-down list.

   Note: The item can have any of the modifier items included in this menu area applied to it.

4. Select **Prime Item** from the **Modifier Group** drop-down list.
5. Select the **Popup Modified Selection** field.
6. Select the **Enabled** field.
7. Type in any additional **Preparation Time** this modifier requires, if relevant.

8. Press 

.

   The prime item is created.

Creating a modifier item

Create a modifier item to add options to another item, such as a type of preparation, additional feature or request, or other modification.

Modifier items cannot be sold at the Point of Sale by themselves. If you want to create an item that can be modified, see *Creating a prime item* on page 96.

> **Note:** If you are providing table service to customers, modifier items are pre-configured customer requests to edit the meal, side-order or drink. For example, adding milk to coffee, or a gluten-free option.

If you want to create a modifier item that does not track stock, see *Creating an item that does not track stock*.

> **Note:** In order to create a modifier item, you must have table service enabled, and a table section and menu area configured. See *Creating a table section* on page 18. Also see *Creating a menu area* on page 84.

To create a modifier item:

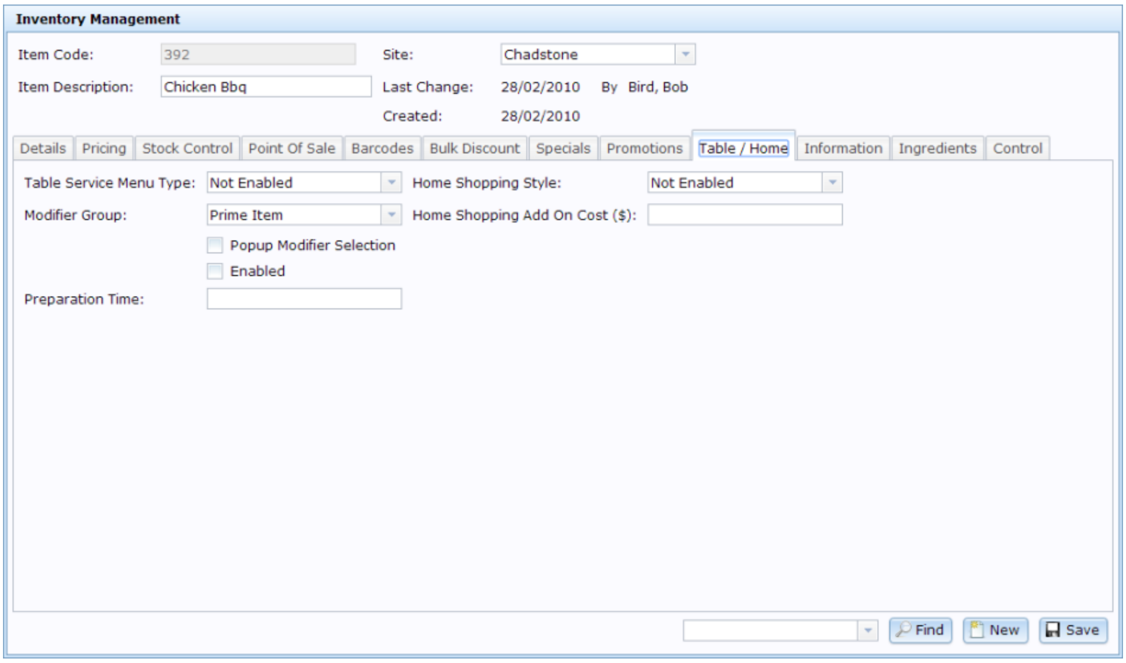
1. Find or create the item you want to be a modifier item.

   See *Finding an item using the search screen*.

   Also see *Creating a new item*.

2. In Inventory Maintenance, press the Table/Home tab.

   The Table / Home tab is displayed.



See *Inventory Management - Table / Home tab*.

3. Select the menu area you want the modifier item to use from the **Table Service Menu Type** drop-down list.

> **Note:** The modifier item can be applied to any prime item in the menu area.

4. Select one of the groups from the **Modifier Group** drop-down list.

> **Note:** It does not matter which group you select, as long as it is **not** the **Prime Item** group. The Portal treats all the groups as if they were one group.

5. Select the **Popup Modified Selection** field.
6. Select the **Enabled** field.
7. Type in any additional **Preparation Time** this modifier requires, if relevant.
8. Press 

.

The modifier item is created.

Glossary

Account

An account is a general ledger structure that categorises particular kinds of income or expenditure for financial reports. Accounts may also be called Ledgers in the Portal.

Aged balance

An aged balance is an amount of money owed that has been adjusted to factor an interest rate applied over time. For example: you owe a creditor $1000, with a 10% interest. You pay $700, leaving $300 still to pay. After the interest period elapses, 10% interest is applied to the remaining $300. Your aged balance is now $330.

Balance

A balance is the total amount of money owed either by yourself to a creditor, or by a debtor to you. A balance may be:

- Positive, indicating money is owed.
- Zero, indicating no money is owed.
- Negative, indicating the party who owed money has over-paid. For example, if you pay a creditor $1000 when you only owed $999, your balance would be -$1.

Barcode

A barcode is a string of numbers that links to an item. Items can have multiple barcodes assigned to them. Some barcodes called Price Embedded Barcodes encode information such as the quantity, weight or price of the item into the barcode. You can configure different types of price embedded barcodes in the Portal.

Batch (kit manufacture)

When manufacturing kits, a batch identifies a single point in time where a specified number of kits were manufactured together.

Batch (stock take)

When performing a continuous stock take, a batch identifies a collection of items scanned at one time by one or more PDTs.

Brand

A brand is a means of identifying items that belong to the same product line. Items can only have one brand, but items from different suppliers may have the same brand.

Company

A company represents your organisation within the Portal. A company can have one or more sites, representing physical locations of stores, including online stores. Some Portal configurations and features affect the entire company, other configurations can be specified per site.

Complete Order

A customer order is complete when:

- The order has been fulfilled on the Portal.
- The order has been marked as paid in full on the Portal or the customer has paid the remaining amount on the Point of Sale.
- The order has been collected or delivered.

Contract

A contract is a set of rules dictating the price, quantity and incentives offered by a supplier for a specific item, used by the Portal when calculating the best supplier to purchase a particular quantity of that item. Each contract relates to a single supplier and item, and you can have multiple contracts for each supplier and each item.

Controlled purchase order / Controlled requisition

A controlled purchase order or requisition cannot be finalised until it has been authorised by Head Office.

Cost matrix / price matrix

A cost matrix or price matrix is a means by which the Portal can automatically calculate the price of an item at each price level based on the item's supplier cost. You can create multiple cost levels, so that the price levels of an item that cost $5 might be calculated very differently from an item that cost $10.

A price matrix can be:

- Department-based, where all items within a department follow the same cost level rules.
- Supplier-based, where all items from the same supplier follow the same cost level rules.

Only one method can be used. You can also elect to use neither.

Credit adjustment

A credit adjustment adds credit to a balance, decreasing the amount of money owed. For example, if you owed a creditor $100, a $10 credit adjustment would mean you owed $90. Credit adjustments are usually used to correct errors. If you need to decrease money owed due to a refund or return, you should use a credit note instead.

Credit limit

A credit limit is the maximum amount of money a debtor is allowed to owe your organisation at any one time. For example, if a debtor's credit limit is $1000 and they already owe $900, they can only go into debt to the value of another $100.

Credit note

A credit note adds credit to a balance, decreasing the amount of money owed. It is usually created when a balance needs to be adjusted due to a return, refund or rebate.

Creditor

A creditor is an entity to whom your company owes money. They may be a supplier, providing the items your company sells, or they may provide another service, such as a cleaner. The Portal treats suppliers and creditors the same. They have a balance tracking how much you owe them, and a credit limit that determines how much your company is allowed to owe them at a time.

Creditor payment

A creditor payment is a Portal record of paying invoices or debit adjustments. More than one invoice or debit adjustment may be paid either partially or in full in a single payment record. Creditor payments are a Portal record only and are not connected to your bank account.

Cross-reference

A cross-reference records the supplier's internal item code for an item to streamline the ordering process. Cross-references can make stock receipting easier, if suppliers use their internal codes on delivery dockets. Cross-references are also required to use the Portal Data Interchange (PDI) feature.

Colour

A colour is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Customer

A customer is a person or organisation who purchases items in advance, to be collected or delivered at a later date. Customers may also have debtor accounts, where they are allowed to owe money to your organisation and can pay off that debt via the Point of Sale.

Debit adjustment

A debit adjustment debits a balance, increasing the amount of money owed. For example, if you owed a creditor $100, a $10 debit adjustment would mean you owed $110. Debit adjustments are usually only used for corrections. If you need to record a charge due to an order of goods or services, you should use an invoice.

Delivery docket

A delivery docket is a type of stock receipt that records the incoming stock without creating a creditor invoice. Delivery dockets cannot record delivery fees or discounts. You can match delivery docket stock receipts to creditor invoices.

Department

A department is a means of categorising items in your inventory. Items can belong to only one department. Depending on your Portal configuration, you may have up to five levels of departments in a hierarchy, by default called Departments, Sub Departments, Categories, Sub Categories and Ranges.

> **Note:** This documentation uses the Portal default names for these levels: Department and Division. Your Portal may be configured to use different names, but the function is the same. You can see the names and levels your Portal uses in the Department Layers tab of Company Maintenance.

Department promotion

A department promotion is a promotion that applies to all items within a specific department. A department promotion allows you to provide a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Discount

A discount is a reduction in the price of an item. Discounts can apply to:

- A selected item, calculated either per-unit or per-line.
- The whole transaction, calculated per-unit or per-line for every item in the transaction.

> **Note:** Some items may have discount maximums. If the discount you select is greater than the maximum discount allowed for the item, the item is only discounted up to its maximum level.

Per-unit discounts can:

- Reduce an item's price by a percentage of the original price. For example, 10% off.
- Reduce an item's price by a flat amount. For example, $1 off.
- Set the per-unit price to a set amount. For example, $5 per item.
- Set the price of the item to its cost price plus a set amount.
- Remove the tax of an item.

Per-line discounts can:

- Cap the total price for an item line to a predetermined amount. For example, the line total may be anything up to a maximum of $10.
- Set the total price for an item line to a predetermined amount. For example, the line total is $10.

A discount may also prompt the operator for a discount amount.

Note: The item and transaction discounts available and the item discount maximums are configured in the Portal.

Note: Special discounts such as some senior citizens or disability discounts make an item tax exempt. If a tax exempt discount is applied, the customer must supply their Senior Citizen or Tax Exempt ID during the tender process in order to receive the discount. The Point of Sale displays the discount as if from the normal tax-inclusive price.

Division

Divisions are top-level classifications for departments in your company. The Portal offers two kinds of divisions to support the Oracle financial interfaces: Reporting and Financial. Each department belongs to a single reporting division and a single financial division.

DSD

A DSD is an external supplier that is not part of your company. You may configure different rules and restrictions for direct suppliers than are used for the company warehouse. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.

Employee

An employee is a member of your company staff that you want to roster on to your staff schedule. Employees may or may not have access to Portal and Point of Sale systems.

Fashion

Fashion is the Portal feature that allows you to create variation of items, such as different colours, sizes and styles of the same item. The default labels of colour, size and style can be changed to something that suits your inventory.

Fixture

A fixture is a physical structure or area within your site that contains stock. This may include gondolas, counters, refrigerators, back-room receipt trolleys, tables, wall sections or any other area that regularly contains stock on your site. Fixtures are used primarily during stock take.

Group promotion

A group promotion is a promotion that applies to all items within a group that you define. A group promotion allows you to provide a free item or a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Group purchase order

A group purchase order is a purchase order that combines the requisitions from several sites into one purchase order. Stock levels can be allocated to each site during the creation of the order.

Inventory

The inventory is the Portal feature of maintaining all items that you offer for sale in your company.

Invoice

An invoice details an amount owed by an entity such as your company or a debtor, and the goods or services that incurred that cost. An invoice usually details the period of time by which it must be paid.

You can also receipt stock using an invoice. An invoice stock receipt automatically creates an invoice for that creditor in your Portal records, and allows you to record additional information such as delivery fees and discounts.

Inter-branch transfers (IBT)

An inter-branch transfer is a transfer of stock from one site within a company to another.

Item

An item represents a good or service provided by your organisation. Items are added to transactions in order to sell or return them. An item will include information about its:

- Barcode.

  > **Note:** An item can have more than one barcode.

- Description.
- Unit of measurement, for example an item may be sold by weight or as individual units.
- Price per unit of measurement.

Items also have additional information stored on the Portal, such as stock on hand, promotions and discount maximums.

Item options

Items can be modified with options to detail the customer's specific request. For example, a coffee order may contain soy milk or extra sugar. The options available for each item must be configured in the Portal.

Item variation

An item variation is an item that uses Fashion variations of colour, size and style. The default labels of colour, size and style may be renamed for your Portal configuration.

Journal

A journal is a unique code identifying a date, site and terminal for a transaction within the Portal.

Kit

A kit is an item that is made up of several other items in your inventory. The kit item itself does not have a stock-on-hand. Instead, when a kit item is sold, the stock-on-hand of the component items is decreased accordingly.

Label

A label is attached to an item and displays information about that item, such as the item's price, best before date and quantity, cooking or nutritional information, or a barcode. Labels can be printed via the Point of Sale.

Ledger

A ledger is a financial category or general ledger grouping that a transaction corresponds to for accounting purposes. For example, Expenses, Staff Salary, etc. The Portal uses a ledger for the Trail Balance Profit report. Your Portal may be configured not to use other ledgers.

Ledger type

A ledger type is a category or grouping of ledgers for accounting and reporting purposes, such as Income or Expenses. Your Portal may be configured not to use ledgers.

Line minimum

A line minimum is the minimum number of different items that must be in a transaction to trigger an effect, such as a promotion. Each unique item in a transaction creates its own line. Multiple units of the same item are recorded on the same line. A line minimum of 3 requires 3 unique items to be purchased.

Manufactured Kit

A manufactured kit is an item that is made up of several other items in your inventory. The kit item must be manufactured on site before it can be sold, and the stock-on-hand of the kit item is tracked by the Portal. When you manufacture a kit, the stock-on-hand of the component items is decreased and the stock-on-hand of the kit item is increased accordingly.

Matching

Matching is the process of linking a delivery docket receipt with a creditor invoice you have created in the Portal. Invoice-type stock receipts automatically create a creditor invoice and do not need to be matched.

Menu area

A menu area is a category of items designed to group items into meal types during table service. For example, coffees, mains, desserts. Menu areas control which modifier items can be applied to which prime items.

Modifier item

A modifier item is an item in your inventory that is used to add a modification to another item, such as adding 'soy milk' to a coffee. While modifier items can have costs and add to the price of the item they are modifying, they cannot be sold directly on the Point of Sale.

Open transaction

An open transaction is a transaction that has not yet been finalised. For example, a creditor invoice that has not been paid.

Operator

An operator is a staff member who uses the Point of Sale to process transactions or manage the cash drawer. Each operator is identified by a unique operator code and password that they use to log into the Point of Sale. Operator codes are unique to each site, but do not have to be unique within a company.

Pack

A pack represents the number of units that an item is supplied in. For example, you may sell cans of soft drink individually, but they are be ordered in packs of 24 from the supplier. This is different to a referral, where both the single can and the pack of cans are tracked in the inventory.

Pallet

A pallet is a set of cartons containing items that are grouped together as a specific collection so they can be tracked from supplier through to sale via barcodes. A pallet usually has a special barcode that encodes the number of cartons it contains, while each carton has a special barcode detailing the quantity of items it contains and their expiry dates.

Pallet barcodes may also be linked electronically to the carton barcodes.

Payment terms

Payment terms is the number of days after issuing an invoice that a creditor expects to be paid. Common payment terms are 21, 30, 60 or 90.

PDT

A PDT, or portable data terminal, is a small hand-held device with a touchscreen and an in-built scanner that can interact with the Portal to sell, order or count stock via the PDT software interface. PDTs are registered as terminals for a site, just as full Point of Sale terminals are, and require operators to log in to use them.

Portal Data Interchange (PDI)

The Portal Data Interchange (PDI) is a Portal feature that allows two separate companies that both use the AMC Convergent IT Portal to streamline their procurement process by automating the creation of customer orders and stock receipts between the companies.

Permission

A permission is a configuration that determines whether an operator is allowed to perform a specific task. For example, the ability to authorise purchase orders or change employee records may be restricted to certain individuals.

Portal operator

A Portal operator is someone with login credentials to your company's Portal. What a Portal operator can do depends on their permissions. A Portal operator cannot use their Portal login to log into the Point of Sale.

Point of Sale operator

A Point of Sale operator is someone with login credentials to your site's Point of Sale and PDTs. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

Point of Sale supervisor

A Point of Sale supervisor is a Point of Sale operator with some additional permissions to do things like authorise changes to the Point of Sale terminal, authorise gift voucher returns, or anything else that your Point of Sale configuration requires a supervisor's authorisation for. Their supervisor status is separate from any Portal permissions they may have. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

Price change

A price change updates the Portal with new prices for each price level of an item. Price changes can only be performed by operators with sufficient Portal privileges.

Price level

The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

Prime item

A prime item is an item that can be sold normally through your Point of Sale. Most of the items in your inventory are likely to be prime items.

Procurement

The procurement system is the set of Portal features that manage and maintain the act of replenishing your stock levels, including managing creditors, contracts, requisitions, purchase orders, stock receipts, returns, adjustments and stock take.

Promotion

A promotion is a Portal feature which lets you create sophisticated rules to offer discounts, free items or rebates when the customer purchases a particular set of or combination of items. The Portal allows you to create promotions based on departments, suppliers, or your own custom item groups.

Promotion group

A promotion group is a group of items you define that either is used to trigger a promotion, or has the effects of the promotion applied to it. You can use the same group for multiple promotions.

Purchase order

A purchase order is a request to an individual supplier to purchase a set quantity of specific items. Purchase orders can be created manually, automatically created from finalised requisitions, or generated using procurement configurations.

Rebate

A rebate is an amount of money offered back to the customer by a supplier as an incentive to purchase. As opposed to a discount, special or promotion, where your company covers the lost profit from the price reduction, the supplier is responsible for reimbursing your company.

Rebate group

A rebate group is a collection of rebate item groups, used to easily control start and end dates of rebates.

Rebate item group

A rebate item group is a collection of rebate items, where each item has its rebate rules defined.

Receipt

A receipt is the printed record of a transaction, including the items, quantities and prices, any loyalty information, the tenders submitted and the operator, the terminal and date the transaction took place at.

Referral

A referral is a connection between two items in your inventory, where one is considered part of the other. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans, you can use a referral so that purchasing a single can (Selling item) depletes your stock of crates (Stock item) by 1/24th. This is different to using packs, as both individual cans and whole crates of items are tracked in your inventory.

Referred item

A referred item is an item that is depleted by the sale of another item. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans and sells the cans individually, the referred item is the crate of cans, which is depleted every time an individual can is sold. Referred items are also called Stock items in this documentation.

Requisition

A requisition is a list of items requested by a particular site. Each item is given a requested supplier, and all items are included in a single requisition, even if they are from different suppliers. Finalising a requisition can automatically open a purchase order for the appropriate suppliers. Requisitions from multiple sites may be combined into a group purchase order for a supplier, if your Portal is configured to permit group purchase orders.

Roster

A roster is a schedule of when specific staff members are supposed to work.

Sale minimum

A sale minimum is a minimum transaction amount used to trigger a promotion or other effect. For example, a sale minimum of $10 requires that at least $10 of items are purchased in a single transaction.

Selling item

A selling item is an item that uses a referral to track its stock levels on a different item. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the individual can is the selling item.

Size

A size is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

> **Note:** This should not be confused with an item's size as defined in the Details tab of Inventory Maintenance, which details how units of an item should be measured and sold.

Snap count

A snap count is a record of the stock-on-hand of an item or set of items at the time of the snap count, as tracked by the Portal. Snap counts are used for calculations and reporting.

Special

A special is a temporary reduced price given to a specific item for a period of time. Where a promotion applies to a group of items, a special applies only to an individual item.

Stock adjustment / write-off

A stock adjustment is a record of increasing or decreasing an item's stock-on-hand, with a reason. For example, stock was found after stock take, or stock has been damaged.

Stock item

A stock item is an item that is referred to by another item, to track the stock-on-hand. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the crate of 24 cans is the stock item.

Stock on hand

Stock on hand is the number of units of a particular item a site currently has. It is updated automatically by stock receipting, transfers, adjustments and sales, and compared against stock take numbers to determine shrinkage.

Stock receipt

A stock receipt is the process of recording stock incoming from a supplier to a site. Stock receipts record the supplier, date, item and quantities, including any items that were received but not ordered, or items that were listed but not delivered. Stock receipts may use a delivery docket, which is a plain record of incoming stock, or an invoice, which creates a corresponding creditor invoice in the Portal to link with the stock receipt.

Stock return

A stock return is the process of returning stock to a supplier because it is faulty or otherwise unsuitable for sale. Stock returns record the date, item and quantity being returned and the reason for each item being returned.

Stock take

A stock take is the process of counting all units of stock at a particular site to obtain an accurate stock-on-hand level. Stock takes can either be continuous, where stock is counted while the site is still open for trading, or manual, where all stock is counted in a single session while the site is closed for trading.

Style

A style is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Supplier

A supplier is a creditor from whom you purchase items in your inventory.

Supplier promotion

A supplier promotion is a promotion that applies to all items marked as purchased from a specific supplier. A supplier promotion allows you to provide a discount or supplier rebate for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Terminal

A terminal is the tablet or other device that runs the Point of Sale. Each terminal is connected to the site via the base station, and is identified by a unique terminal number, which is recorded in every transaction made by the terminal.

Point of Sale Transaction

A Point of Sale transaction is an exchange of items, which represent goods or services provided by your organisation, for payment. Transactions include all the relevant information about the exchange:

- The date, time, site and location of the transaction.
- The operator who performed the transaction, and which terminal they used.
- The items purchased or returned and in what quantities.
- The amounts and types of payments provided, including any change or reimbursement provided to the customer or redeemed loyalty points.

  > **Note:** Transactions cannot be finalised until they balance. That is, the amount owed by the customer is zero, and any amount that has been overtendered has been issued as change.

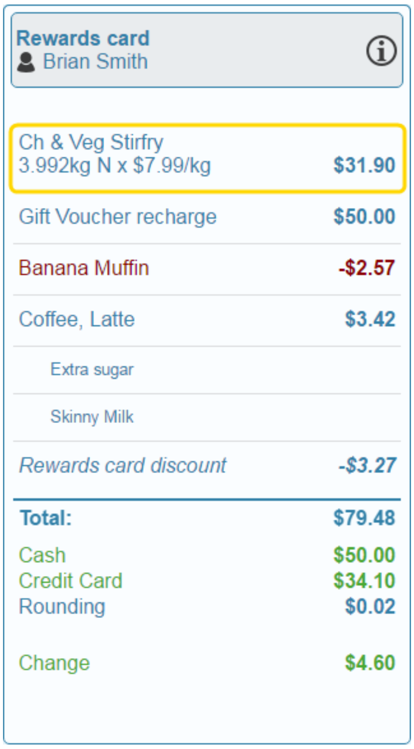
- The loyalty number linked to the transaction, if applicable.

You can view what is currently included in the transaction in the Transaction list of the Point of Sale.

> **Note:** In the Portal, a transaction also refers to an exchange of money, such as the payment of a creditor, or a debit adjustment.

Transaction line

A transaction line is an entry in the Transaction list that contains an item and its quantity. If more than one unit of an item is added to a transaction, the units are grouped into a single line. Actions such as price overrides, voids, discounts or refunds then apply to all units in the line.



Warehouse

A warehouse is a supplier that represents your company's central warehouse, used when sites order some or all of their inventory from Head Office rather than directly from external suppliers. You may configure different rules and restrictions for warehouse suppliers than are used for direct suppliers. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.