



Portal User Guide

Site Management

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Managing companies and sites

The Portal offers a set of supporting features to help you manage your companies and sites behind the scenes more easily, including easy ways of refreshing and copying information between sites, terminals and companies, and downloading and installing updates.

Also see *Managing your sites* on page 55.

Access reports

See who has been accessing your Portal companies and when with the access reports.

- *Access report* on page 10.
- *Access Counts report* on page 7.

Company maintenance

You can upload files to be available throughout your company via the Portal. If you manage multiple companies through the Portal, you can also switch between them and copy information from one company to another.

- *Uploading files into a company* on page 52.
- *Online File Upload screen* on page 53.
- *Switching companies* on page 49.
- *Copying information across companies* on page 19.
- *Switch Companies screen* on page 50.
- *Company Copy screen* on page 21.

Site maintenance

You can copy information between sites, recover transactions for a site, and perform other site-wide operations like refreshing the Point of Sale information or resetting your stock-on-hand levels.

- *Copying information across sites* on page 23.
- *Site Copy screen* on page 25.
- *Recovering transactions* on page 35.
- *Refreshing site information* on page 36.
- *Refresh Data Options report* on page 38.

Software updates and user manuals

You can download software updates and compatible third-party software to use with the Portal, or user guides to help you get the most from your Portal use.

- *Available Installations report* on page 13.
- *Available Updates report* on page 16.
- *Release File report* on page 46.
- *Available Manuals report* on page 29.
- *Available Presentations report* on page 32

Tenders

You can create and maintain the available tender types for each site:

- *Tender Maintenance screen* on page 341.

Access Counts report

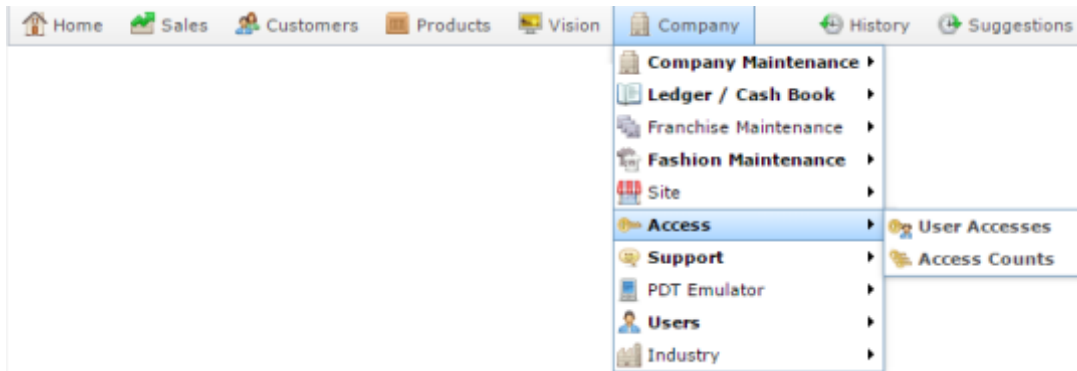
Use the Access Counts report to view the number of times the Portal has been accessed by your operators within a specific period.

Note: This report is restricted to high levels of account privilege.

Opening the Access Counts report

To open the Access Counts report:

1. Press  **Company** from the menu bar.
2. Press **Access > Access Counts**.



The Access Counts report is displayed.

Access Counts Report

Counts	Sunday 27-Nov- 2016	Monday 28-Nov- 2016	Tuesday 29-Nov- 2016	Wednesday 30-Nov- 2016	Thursday 01-Dec- 2016	Friday 02-Dec- 2016	Saturday 03-Dec- 2016	Total
Counts	2,045	2,288	2,109	1,279				7,721
Total:	2,045	2,288	2,109	1,279				7,721

States
All

By
Day

Date
30/11/2016

Add to Favourites

Access Counts report key fields

Filters area

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

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
By	Select to display the report for a specific day, day of the week, 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.
States	Select a state or county to filter the report by.

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
Day / Week / Month / Year end	Display the summary total for the selected period. <div data-bbox="911 799 1394 965"><p>Note: The information displayed depends on the report filters selected.</p></div>

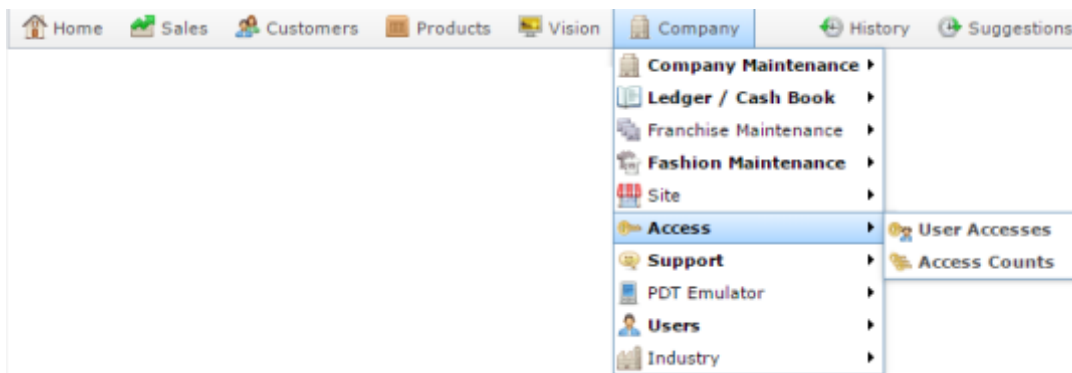
Access report

Use the Access report to view the number of times your Portal operators have accessed the Portal during a specified period, and which companies they accessed.

Opening the Access report

To open the Access report:

1. Press  Company from the menu bar.
2. Press Access > User Accesses.



The Access report is displayed.

Access Report

Login Name	Company	Sunday 27-Nov- 2016	Monday 28-Nov- 2016	Tuesday 29-Nov- 2016	Wednesd 30-Nov- 2016	Thursday 01-Dec- 2016	Friday 02-Dec- 2016	Saturday 03-Dec- 2016	Total
Bob	Example Company		101						101
Bob	AMC Master		13	55	21				89
Jac	Whats Up Hair		8						8
Jac	AMC Master		6						6
Jord	Tops Test		183						183
Jord	AMC Master		22						22
Swift	Swift POS Test				8				8
Total:			333	55	29				417

States: All
Site: All
By: Day
Date: 30/11/2016
Add to Favourites

Access report key fields

Filters area

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

Field	Description
<input type="button" value="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, day of the week, 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.
States	Select a state or county to filter the report by.

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
Login / Name	The user's login name.
Company	The name of the relevant company.
Day / Week / Month / Year end	Display the summary total for the selected period.

Note: The information displayed depends on the report filters selected.


Available Installations report

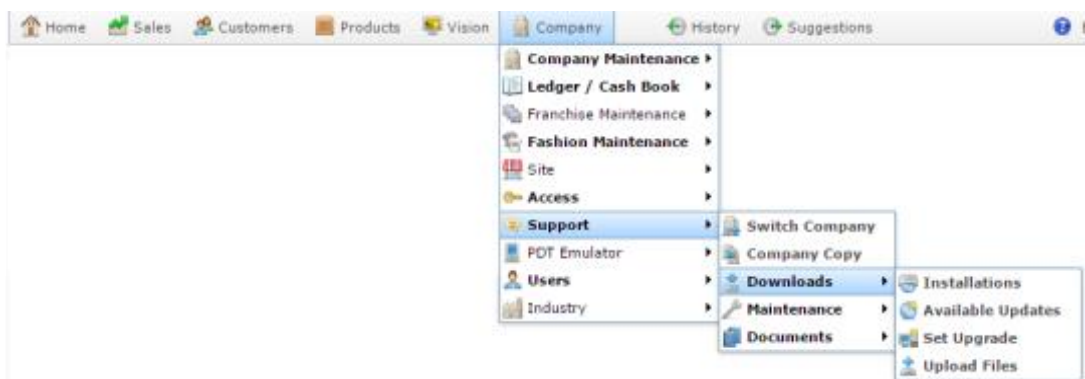
Use the Available Installations report to view additional installations that you can download to use in conjunction with the Portal.

Press the **Name** field to download the file and follow the instructions in the **Comments** field to install the software.

Opening the Available Installations report

To open the Available Installations report:

1. Press  **Company** from the menu bar.
2. Press **Support > Downloads > Installations**.



The Available Installations report is displayed.

Available Installations

Name	Version	Release Date	Size	Comments
Avery Label System	1.00	June 2004	30M	As per Instructions
Flash Advertising System 1200 x 764	xxx	10 Oct 2004	886 K	Installer
LUW	2.00	June 2004	30M	Unzip to a known directory and install
Quest Installer	x.xx	November 2005	594M	Unzip to a known directory and Execute
Remote Support (Ultra)	1.0.8.2	15 Feb 2010	1.8M	Download and execute
Win Zip	9.00	June 2004	2.3M	As per WinZip Instructions

[Add to Favourites](#)

Available Installations 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.

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 / Filename	Name of the software, document or Portal system file available. Press to download this file to your computer.
Version	The release version of this software or document available.
Release Date	The date this version of the software or document was released.
Size (K)	The size of the file.
Comments	A description of the file, including installation instructions if applicable.

Available Updates report

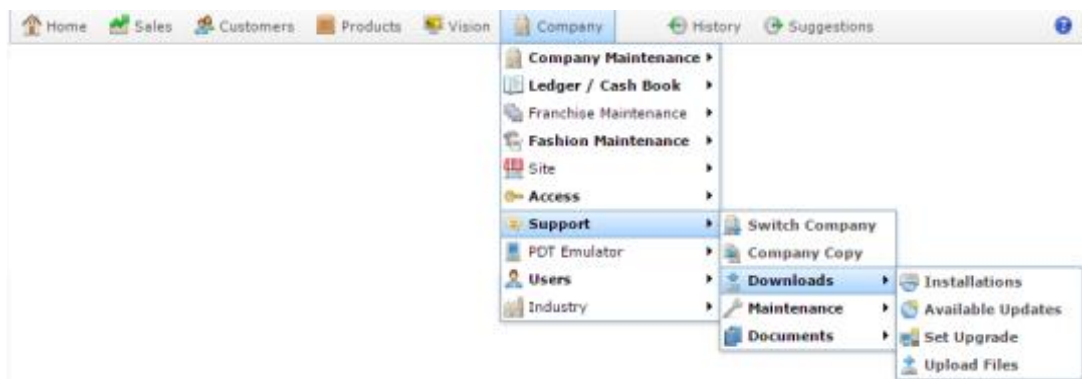
Use the Available Updates report to download Portal system updates that are available.

Press the **Name** field to download the update and follow the instructions in the **Comments** field to install them.

Opening the Available Updates report

To open the Available Updates report:

1. Press  **Company** from the menu bar.
2. Press **Support > Downloads > Available Updates**.



The Available Updates report is displayed.

Available Updates

Add to Favourites

Name	Version	Release Date	Size	Comments
Blank Department File File	--	27 August 2004	28K	Extract to c:\tillmast\data
Blank Specials File	--	27 August 2004	28K	Extract to c:\tillmast\data
Blank Stock File File	--	27 August 2004	28K	Extract to c:\tillmast\data
Customer Orders	1.11	December 2006	1M	Save to c:\tillmast after backing up the C:\tillmast Directory
PosPortal Upgrade (4.106) (pre 4.44 systems)	4.92	May 2011	15M	Save to c:\tillmast after backing up the C:\tillmast Directory
PosPortal Upgrade (4.116)	4.92	May 2011	3M	Save to c:\tillmast after backing up the C:\tillmast Directory
Vision (2.07)	2.07	July 2011	1.2M	Save to c:\Vision after backing up the C:\Vision Directory
Vision WEB Installation (2.07)	2.07	July 2011	2.2M	Save to Temp Directory

Available Updates 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.

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 / Filename	Name of the software, document or Portal system file available. Press to download this file to your computer.
Version	The release version of this software or document available.
Release Date	The date this version of the software or document was released.
Size (K)	The size of the file.
Comments	A description of the file, including installation instructions if applicable.

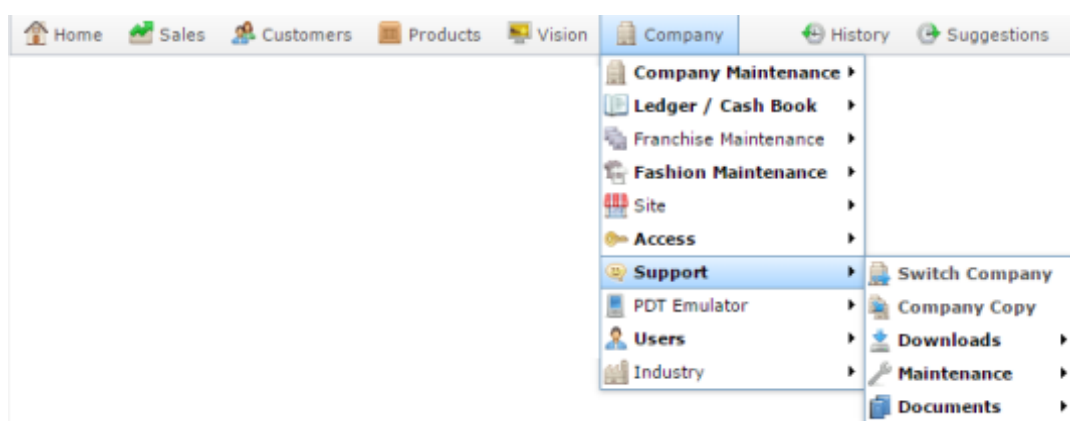
Copying information across companies

Copy creditor or supplier cross-reference information when you want the creditors or supplier cross-references to be available in another company.

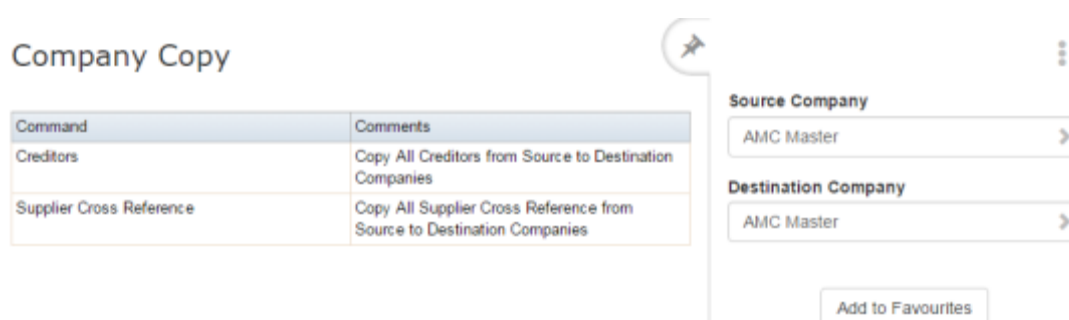
Note: This option is only displayed if you have more than one company on the Portal, and you have permission to access other companies.

To copy information from one company to another:

1. Press  **Company** in the main menu bar.
2. Press **Support > Company Copy**.



The Company Copy screen is displayed



3. Select the company whose information you want to copy in the **Source Company** field.
4. Select the company you want to copy information into in the **Destination Company** field.
5. Press either:
 - The **Creditors** link to copy the creditor information from the Source Company to the Destination Company.

- The [Supplier Cross Reference](#) link to copy the supplier cross reference codes from the Source Company to the Destination Company.

The information is copied.


Company Copy screen

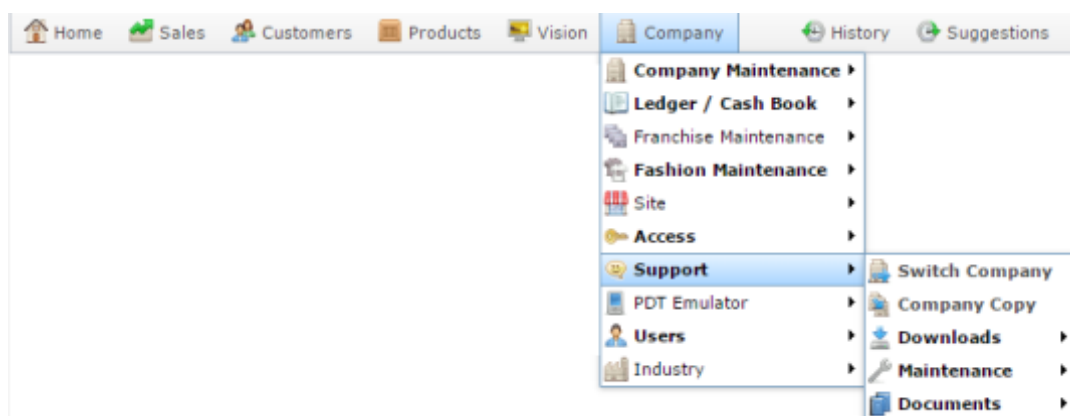
Use the Company Copy screen to copy creditor or supplier cross-reference information from one company to another. Copied information is inserted only where it will not conflict with existing information: the information in the destination company is never overwritten.

Note: This option is only displayed if you have more than one company on the Portal, and you have permission to access other companies.

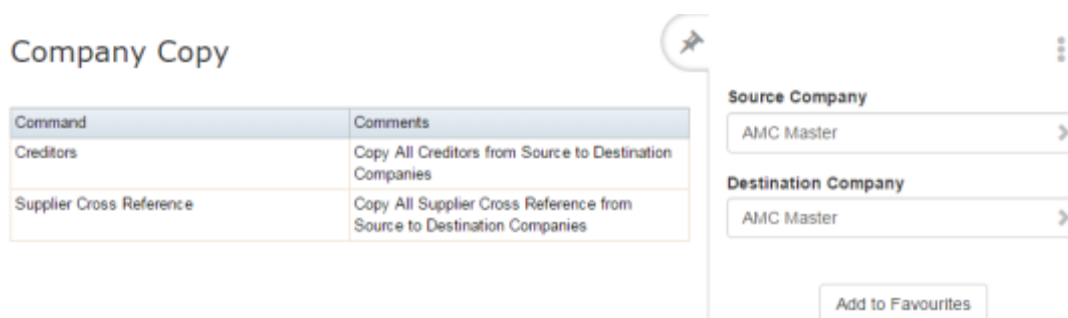
Opening the Company Copy screen

To open the Company Copy screen:

1. Press  Company in the main menu bar.
2. Press Support > Company Copy.



The Company Copy screen is displayed



Company Copy screen key fields and buttons

Field	Description
-------	-------------

Field	Description
Command	Press: <ul style="list-style-type: none"> ▪ The Creditors link to copy the creditor information from the Source Company to the Destination Company. ▪ The Supplier Cross Reference link to copy the supplier cross reference codes from the Source Company to the Destination company.
Source Company	Select the company whose information you want to copy.
Destination Company	Select the company you want to copy information into.


Copying information across sites

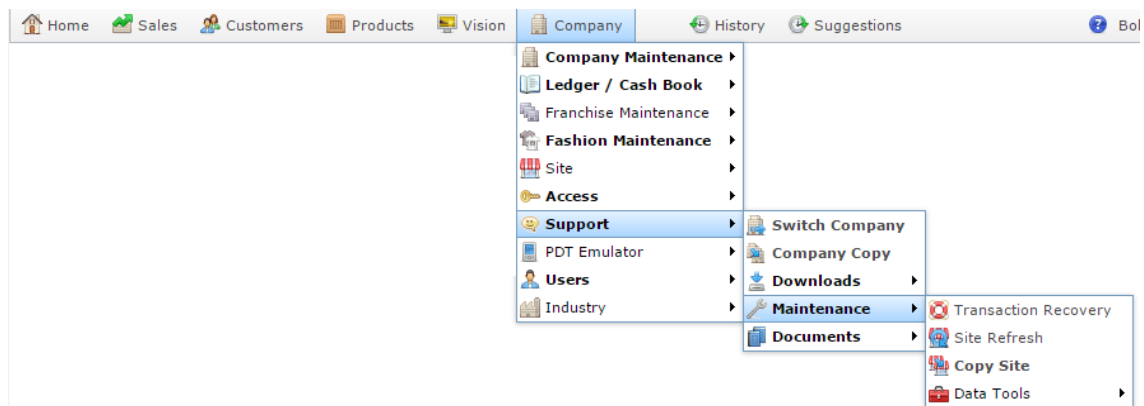
Copy configurations or inventory information from one site to another when you want the destination site to access that information or configurations.

Tip: This is useful for setting up a new site quickly.

Note: This option is only displayed if you have more than one site on the Portal, and you have permission to access both sites.

To copy information from one site to another:

1. Press  **Company** in the main menu bar.
2. Press **Support > Maintenance > Copy Site**.



The Site Copy screen is displayed

Site Copy

Command	Comments
Brands - References	Copy All Brands from Source To Destination Site(s)
Bulk Discount	Copy All Active Bulk discounts from Source To Destination Site(s)
Department Cost Matrix	Copy All Department Cost Matrix from Source To Destination Site(s)
Items and Barcode Copy	Copy All Items from Source To Destination Site(s)
Items and Barcode Copy (Terminal Update)	Copy All Items from Source To Destination Site(s)
Modifiers	Copy All Modifiers from Source To Destination Site(s)
Pending Updates	Copy All Pending Updates from Source To Destination Site(s)
Promotions	Copy All Active Promotions from Source To Destination Site(s)
Schedules	Copy All Schedule Services from Source To Destination Site(s)
Specials	Copy All Active Specials from Source To Destination Site(s)
Supplier Cost Matrix	Copy All Supplier Cost Matrix from Source To Destination Site(s)
Supplier Cross Reference	Copy All Supplier Cross References from Source To Destination Site(s)

Source Site

AMC

Destination: Site

All

Add to Favourites

3. Select the site whose information you want to copy in the **Source Site** field.
4. Select the site you want to copy information into in the **Destination Site** field.
5. Press the command link of the information you want to copy.

See *Site Copy screen* on page 25.

The information is copied.


Site Copy screen

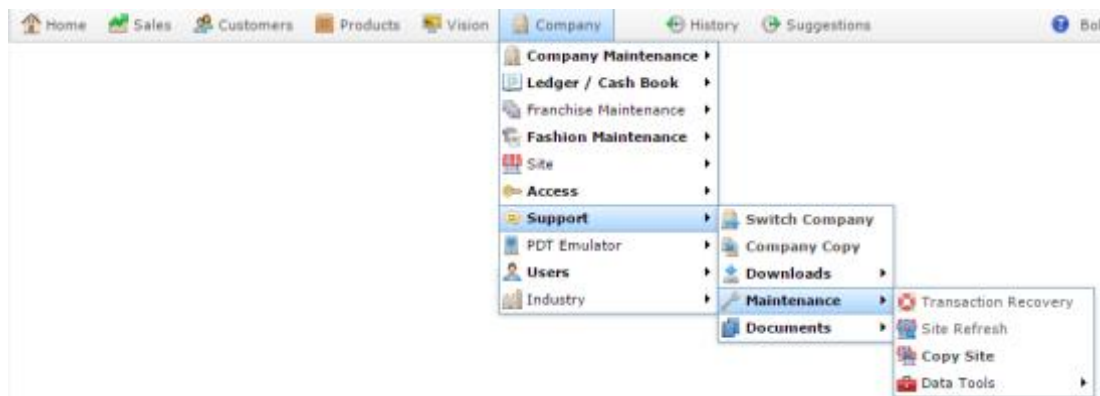
Use the Site Copy screen to copy configurations and inventory information from one site to another, including a site of a different company. Copied information is inserted only where it will not conflict with existing information: the information in the destination site is never overwritten.

Note: This option is only displayed if you have more than one site in your company, and you have permission to access both sites.

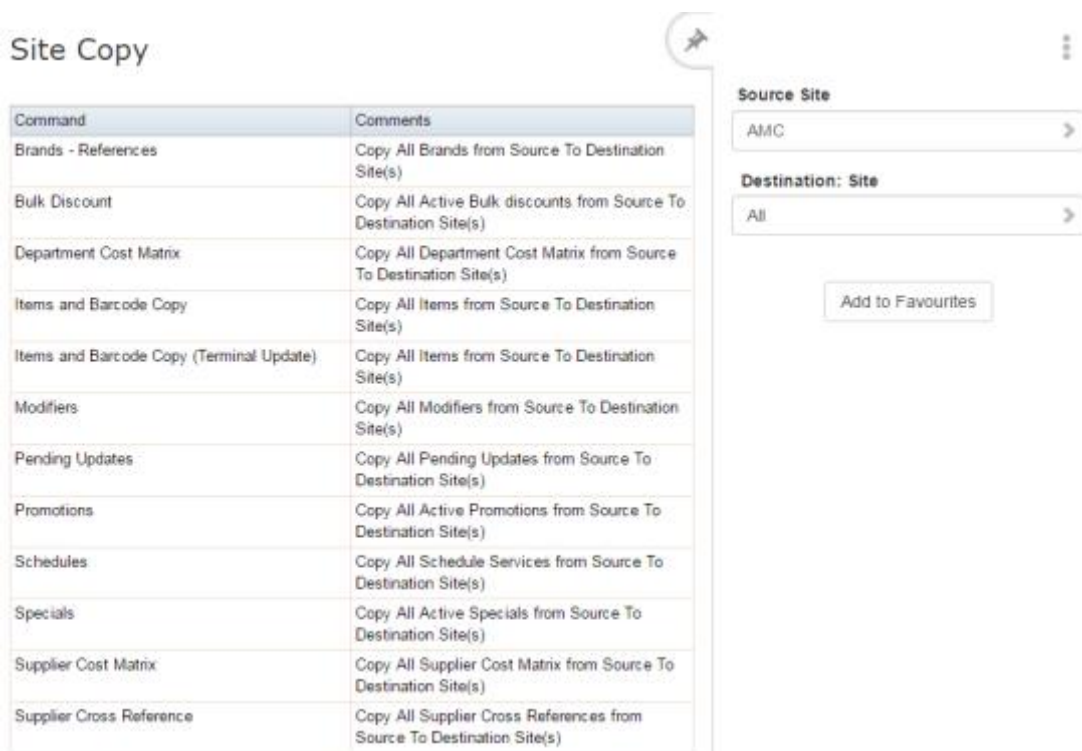
Opening the Site Copy screen

To open the Site Copy screen:

1. Press  **Company** in the main menu bar.
2. Press **Support > Maintenance > Copy Site**.



The Site Copy screen is displayed



Site Copy screen key fields and buttons

Command

Press the command link to copy the information you need.

Command	Description
Brands	Copy all of the brands configured in your source site to your destination site. <i>See Brand Grid report.</i>
Bulk Discount	Copy all of the bulk discounts configured for items in your source site to the destination site. <i>See Managing bulk discounts.</i>

Command	Description
Department Cost Matrix	Copy the department cost matrix configured in your source site to the destination site. <i>See Cost to Sell Price Matrix screen.</i>
Items and Barcode Copy	Copy all of the inventory and item barcodes configured in your source site to the destination site. <i>See Inventory maintenance.</i>
Items and Barcode Copy (Terminal Update)	Copy all of the inventory and item barcodes configured in your source site to the destination site, and then refresh all terminals at the destination site to retrieve the new product master. <i>See Inventory maintenance.</i> <i>Also see Refreshing an item on the Point of Sale.</i>
Modifiers	Copy all of the modifier items configured in your source site to the destination site. <i>See Managing item options and modifiers.</i>
Pending Updates	Copy all of the pending updates to your source site to the destination site.
Promotions	Copy all of the promotions configured in your source site to the destination site. <i>See Managing promotions.</i>
Schedules	Copy all of the scheduler services in your source site to the destination site. <i>See Managing the Scheduler.</i>

Command	Description
Specials	Copy all of the item specials configured in your source site to the destination site. <i>See Managing price specials.</i>
Supplier Cost Matrix	Copy the supplier cost matrix configured in your source site to the destination site. <i>See Managing price matrices.</i>
Supplier Cross Reference	Copy all of the supplier cross-references configured for items in your source site to the destination site. <i>See Adding supplier cross-references for items.</i>

Other fields

Field	Description
Source Site	Select the site whose information you want to copy.
Destination Site	Select the site you want to copy information into.

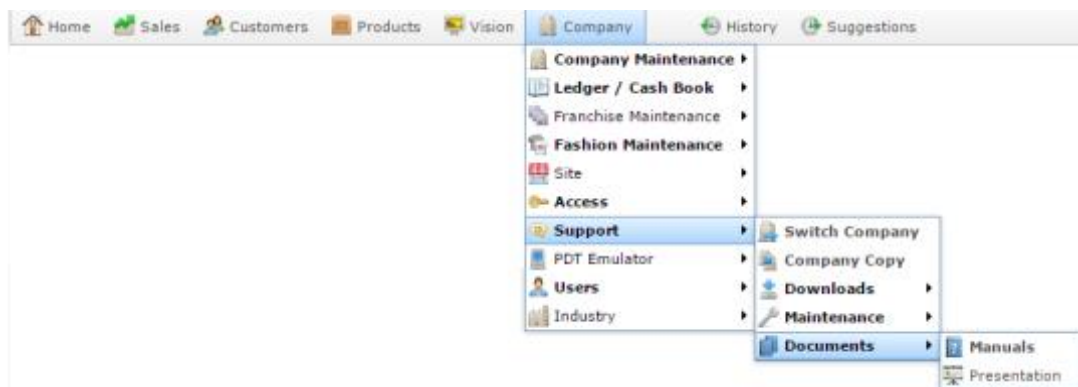
Available Manuals report

Use the Available Manuals report to download Portal documentation manuals and user guides that are available.

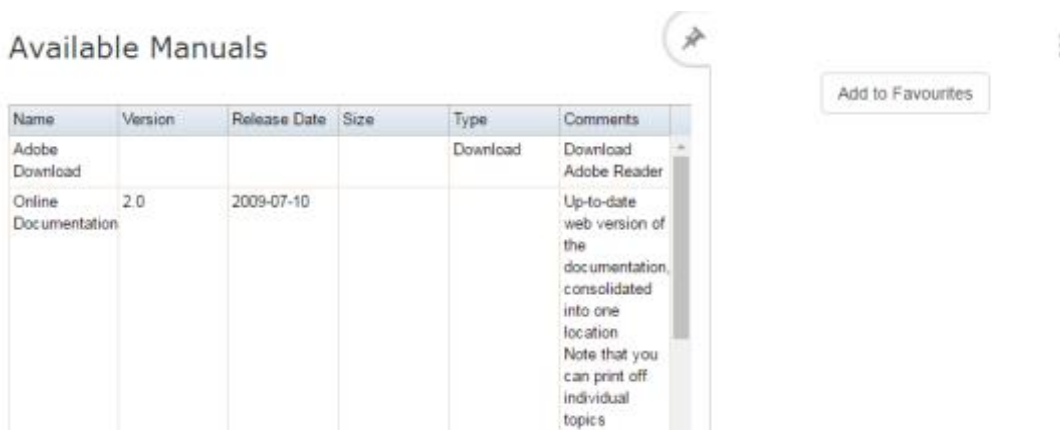
Opening the Available Manuals report

To open the Available Manuals report:

1. Press  **Company** from the menu bar.
2. Press **Support > Documents > Manuals**.



The Available Manuals report is displayed.



The screenshot shows the 'Available Manuals' report. The table has the following columns: Name, Version, Release Date, Size, Type, and Comments. There are two rows of data. The first row is for 'Adobe Download' with a 'Download' type and a comment 'Download Adobe Reader'. The second row is for 'Online Documentation' with version '2.0', release date '2009-07-10', and a comment 'Up-to-date web version of the documentation, consolidated into one location. Note that you can print off individual topics'. There is also an 'Add to Favourites' button to the right of the table.

Name	Version	Release Date	Size	Type	Comments
Adobe Download				Download	Download Adobe Reader
Online Documentation	2.0	2009-07-10			Up-to-date web version of the documentation, consolidated into one location. Note that you can print off individual topics

Available Manuals 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.

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 / Filename	Name of the software, document or Portal system file available. Press to download this file to your computer.
Version	The release version of this software or document available.
Release Date	The date this version of the software or document was released.
Size (K)	The size of the file.
Type	How the document is available: as a download or an online document on zenglobal.net.
Comments	A description of the file, including installation instructions if applicable.

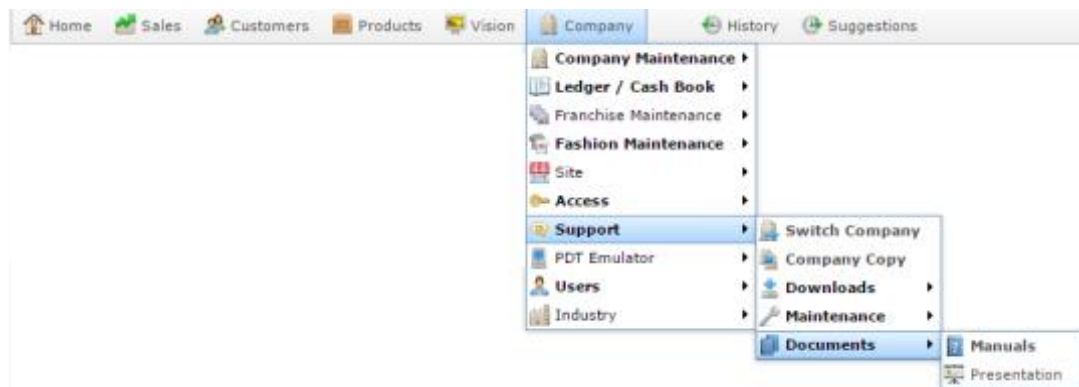
Available Presentations report

Use the Available Presentations report to download presentation manuals from the Portal.

Opening the Available Presentations report

To open the Available Presentations report:

1. Press  **Company** from the menu bar.
2. Press **Support > Documents > Presentation**.



The Available Presentations report is displayed.



Available Presentations 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.

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 / Filename	Name of the software, document or Portal system file available. Press to download this file to your computer.
Version	The release version of this software or document available.
Release Date	The date this version of the software or document was released.
Size (K)	The size of the file.
Comments	A description of the file, including installation instructions if applicable.

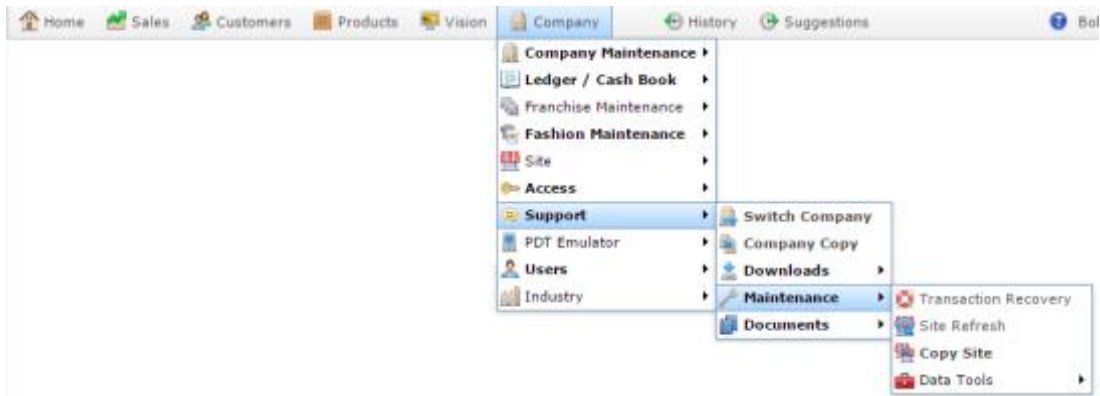
Recovering transactions

This feature is used by AMC Convergent IT support staff to recover transactions that were not transferred by TCP/IP protocols, or transactions that required editing after processing.

Note: This feature is only available to AMC Convergent IT support staff.

To recover transactions:

1. Press  **Company** in the main menu bar.
2. Press **Support > Maintenance > Transaction Recovery**.



The Portal recovers your transactions.


Refreshing site information

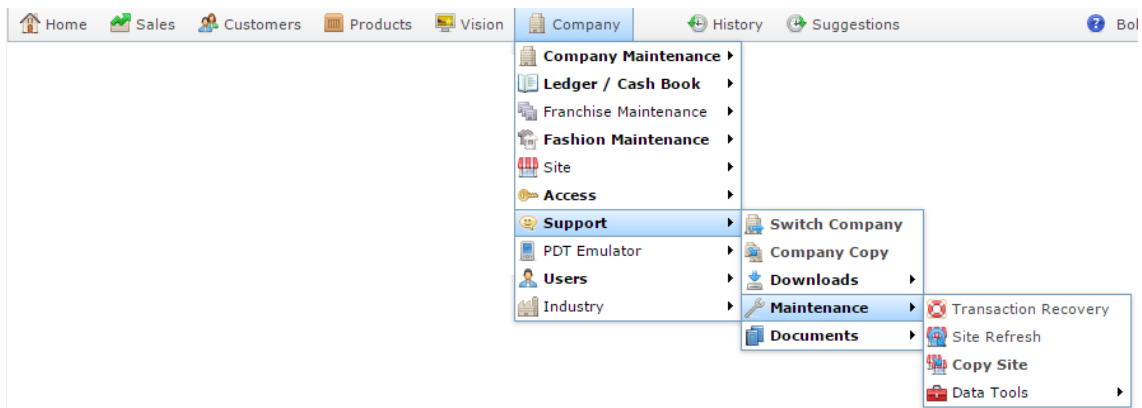
Refresh a site to perform a large-scale action across your site, such as setting all stock-on-hand of a particular supplier's item to 0, or forcing a terminal to refresh their promotion or specials information.



Important Note: Many of these actions make permanent changes to your site that are not easily undone. Make sure you select the correct action, and use the filter options to restrict your refresh appropriately.

To refresh a site:

1. Press  **Company** in the main menu bar.
2. Press **Support > Maintenance > Site Refresh**.



The Refresh Data Options report is displayed

Refresh Data Options

Command	Comments
Base Station	Refresh Base Station Settings
Base Station (set Portal Parameters Only)	Set Base Station Settings
Base Station Terminals	Refresh Terminals to Base Station
Department - POS / Base Station	Refresh Departments to Terminals(s)
Discounts - Bulk - POS / Base Station	Refresh Current Bulk Discounts to Terminals(s)
Discounts - Item / Sale	Refresh Current POS discounts to Terminals(s)
Embedded Barcode Configuration	Refresh Embedded barcode Configuration to Terminals(s)
Items - POS / Base Station	Refresh Items and Barcodes to Terminals(s)
Labels - Delete (Change)	Delete All Item Change Label records
Labels - Delete (Manual)	Delete All Manual Label records
Labels - Delete (Stocktake)	Delete All Stock Take Label records
Labels - Load	Load Manual Labels from Inventory (Stock on Hand not equal zero)
Labels - Load All	Load Manual Labels from Inventory (Full)
PosPortal - Loyalty Card	Refresh Loyalty Information to Terminals(s)

Site

Supplier

Item Type

Department

Terminal

3. Select the site you want to refresh in the **Site** field.
4. If applicable, restrict the site refresh to a specific supplier, item type, department or terminal by selecting the options in the filter fields.

Refresh Data Options

Command	Comments
Base Station	Refresh Base Station Settings
Base Station (set Portal Parameters Only)	Set Base Station Settings
Base Station Terminals	Refresh Terminals to Base Station
Department - POS / Base Station	Refresh Departments to Terminals(s)
Discounts - Bulk - POS / Base Station	Refresh Current Bulk Discounts to Terminals(s)
Discounts - Item / Sale	Refresh Current POS discounts to Terminals(s)
Embedded Barcode Configuration	Refresh Embedded barcode Configuration to Terminals(s)
Items - POS / Base Station	Refresh Items and Barcodes to Terminals(s)
Labels - Delete (Change)	Delete All Item Change Label records
Labels - Delete (Manual)	Delete All Manual Label records
Labels - Delete (Stocktake)	Delete All Stock Take Label records
Labels - Load	Load Manual Labels from Inventory (Stock on Hand not equal zero)
Labels - Load All	Load Manual Labels from Inventory (Full)
PosPortal - Loyalty Card	Refresh Loyalty Information to Terminals(s)

Site

AMC >

Supplier

All >

Item Type

All >

Department

All >

Terminal

All >

Add to Favourites

5. Press the command link of the type of refresh you want to perform.

See *Refresh Data Options report* on page 38.


The site refresh is performed.

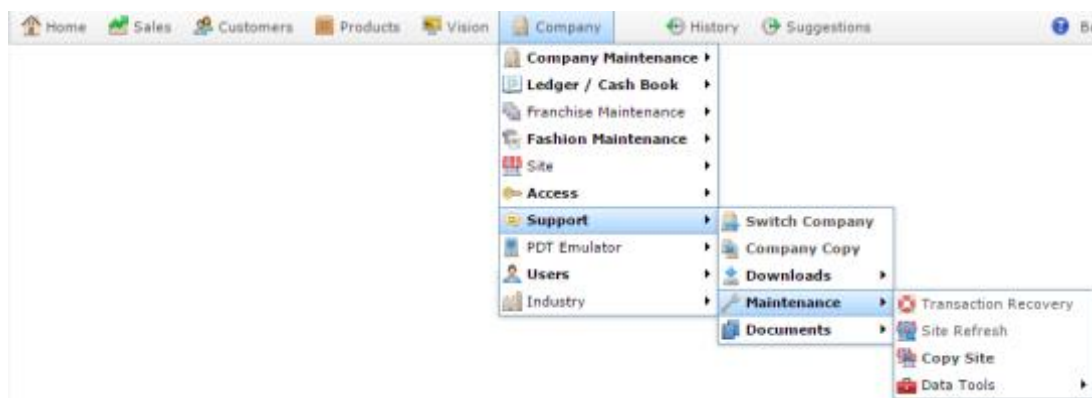
Refresh Data Options report

Use the Refresh Data Options report to make large updates across a site at once. For example, setting all stock-on-hand in a particular department to zero.

Opening the Refresh Data Options report

To open the Refresh Data Options report:

1. Press  **Company** in the main menu bar.
2. Press **Support > Maintenance > Site Refresh**.



The Refresh Data Options report is displayed

Refresh Data Options

Command	Comments
Base Station	Refresh Base Station Settings
Base Station (set Portal Parameters Only)	Set Base Station Settings
Base Station Terminals	Refresh Terminals to Base Station
Department - POS / Base Station	Refresh Departments to Terminals(s)
Discounts - Bulk - POS / Base Station	Refresh Current Bulk Discounts to Terminals(s)
Discounts - Item / Sale	Refresh Current POS discounts to Terminals(s)
Embedded Barcode Configuration	Refresh Embedded barcode Configuration to Terminals(s)
Items - POS / Base Station	Refresh Items and Barcodes to Terminals(s)
Labels - Delete (Change)	Delete All Item Change Label records
Labels - Delete (Manual)	Delete All Manual Label records
Labels - Delete (Stocktake)	Delete All Stock Take Label records
Labels - Load	Load Manual Labels from Inventory (Stock on Hand not equal zero)
Labels - Load All	Load Manual Labels from Inventory (Full)
PosPortal - Loyalty Card	Refresh Loyalty Information to Terminals(s)

Site

AMC

Supplier

All

Item Type

All

Department

All

Terminal

All

Add to Favourites

Refresh Data Options report key fields and buttons

Filters

Use the filter options to select the site you want to refresh, and restrict the action to a specific supplier, item type, department or terminal.

Field	Description
Site	Select the site to perform the action on.
Supplier	Select a supplier to restrict the action to, or All to not restrict based on supplier.
Item Type	Select an item type to restrict the action to, or All to not restrict based on item type.
Department	Select a department to restrict the action to, or All to not restrict based on department.
Terminal	Select a terminal to restrict the action to, or All to affect all terminals at this site.
Add to Favourites	Press to add the Refresh Data Options report to your favourites. See <i>Managing favourite links</i> .

Commands

Press the command you want to perform on the site.




Important Note: Many of these actions make permanent changes to your site that are not easily undone. Make sure you select the correct action, and use the filter options to restrict your refresh appropriately.

Note: The Point of Sale usually collects updates every two to five minutes. However, if there are a lot of changes to be sent to your Point of Sale, such as a full product master, it may take some time for all updates to arrive. Updates are sent to the Point of Sale in a first-in-first-out order. You can check whether your update is still pending on the Terminal Details report. See *Checking the site update queue*.

Field	Description
Base Station	Sets the terminal as a new base station with all the critical settings.
Base Station (set Portal Parameters Only)	Sets the terminal as a new base station, but only sets the Portal parameters of Vouchers, Terminal, Company and Site.
Base Station Terminals	Re-send the base station connection information to the terminals. Use this when terminals are not correctly communicating with the base station.
Department - POS / Base Station	Replace the department information on the Point of Sale terminals and base station with the site's current department information. Use this when you have changed the structure of departments in your site.

Field	Description
Discounts - Bulk - POS / Base Station	<p>Replace the bulk discount information on the Point of Sale terminals and base station with the site's current bulk discount information.</p> <p>Use this when you have changed your bulk discount settings and you do not see the updated settings on the terminal within an hour.</p>
Discounts - Item / Sale	<p>Replace the sales discount and item discount information on the Point of Sale terminals and base station with the site's current discount configurations.</p> <p>Use this when you have changed your sales or item discount settings and you do not see the updated settings on the terminal within an hour.</p>
Embedded Barcode Configuration	<p>Replace the embedded barcodes stored on the terminals with the site's embedded barcodes.</p> <p>Use this when you have changed your embedded barcode settings and you do not see the updated settings on the terminal within an hour.</p>
Items - POS / Base Station	<p>Replace the product master information on the Point of Sale terminals and base station with the site's current product master.</p> <p>Use this when you have changed your inventory and you do not see the updated settings on the terminal within an hour.</p>
Labels - Delete (Change)	<p>Delete all the past item change labels.</p> <p>Use this when you no longer need the archive records of previous item change labels.</p>
Labels - Delete (Manual)	<p>Delete all the past manually created labels.</p> <p>Use this when you no longer need the archive records of previous manually-created labels.</p>

Field	Description
Labels - Delete (Stocktake)	<p>Delete all the past stocktake labels.</p> <p>Use this when you no longer need the archive records of previous stocktake labels.</p>
Labels - Load	<p>Load labels into the Request Label Management screen for all items in your inventory that have a stock-on-hand of more than zero.</p> <p><i>See Receipt Label Management screen</i></p> <p>Use this when you want to print (or reprint) labels for all items you currently have stock for at this site.</p>
Labels - Load All	<p>Load labels into the Request Label Management screen for all items in your inventory, including items with a stock-on-hand of zero.</p> <p><i>See Receipt Label Management screen</i></p> <p>Use this when you want to print (or reprint) labels for all items in your inventory, even items you do not have in stock.</p>
PosPortal - Loyalty Card	<p>Replace the loyalty information in your PosPortal Point of Sale with the loyalty information on your site.</p> <p>Use this when you have made changes to your loyalty members and you do not see the updated settings on the terminal within an hour.</p>
Printers	<p>Send all printer settings.</p>
Promotions - POS / Base Station	<p>Replace the promotion configurations on the Point of Sale terminals and base station with the site's current promotion configuration.</p> <p>Use this when you have changed your promotion settings and you do not see the updated settings on the terminal within an hour.</p>

Field	Description
Receipt Header - POS / Base Station	<p>Replace the receipt information on the Point of Sale terminals and base station with the site's current receipt header.</p> <div data-bbox="507 483 1318 555" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;"> <p>Note: Configure the receipt header using the POS Files screen under Site Management.</p> </div> <p>Use this when you have changed your bulk discount settings and you do not see the updated settings on the terminal within an hour.</p>
Services - POS / Base Station	<p>Replace the scheduler services.</p>
Specials - POS / Base Station	<p>Replace the item specials information on the Point of Sale terminals and base station with the site's current item specials.</p> <p>Use this when you have changed your item specials settings and you do not see the updated settings on the terminal within an hour.</p>
Stock - Reset On Order	<p>Set the stock-on-order amount for all items to zero.</p>
Stock - Reset SOH	<p>Set the stock-on-hand amount for all items to zero.</p> <p>Use this when you want to zero all of your stock amounts and set them up again from scratch.</p> <div data-bbox="507 1529 1347 1753" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;"> <p> Important note: The stock-on-hand amounts for all items in your selection is set to zero. This action does not create an audit trail and cannot be undone. If you accidentally select this option, you must perform a stock take to restore your stock levels.</p> </div>
Stock - Reset Shrink	<p>Set the stock shrinkage at your site to zero.</p> <p>Use this when you want to count shrinkage from zero.</p>

Field	Description
Tables - Create	<p>Create the default tables and menu settings for your site.</p> <p>Use this to quickly set up a basic table service for this site with ten tables.</p>
Tables - Sections and Menus	<p>Replace the table and menu information on the Point of Sale terminals and base station with the site's current table and menu information.</p> <p>Use this when you have changed your table service settings and you do not see the updated settings on the terminal within an hour.</p>
Tax Rates	<p>Replace the tax settings information on the base station with the site's current tax settings.</p> <p>Use this when you have changed your tax settings and you do not see the updated settings on the terminal within an hour.</p>
Tenders - POS / Base Station	<p>Replace the tenders information on the Point of Sale terminals and base station with the site's current tender information.</p> <p>Use this when you have changed your tender settings and you do not see the updated settings on the terminal within an hour.</p>
Users - POS / Base Station	<p>Replace the operator information on the Point of Sale terminals and base station with the site's current operators.</p> <p>Use this when you have changed your user information and you do not see the updated settings on the terminal within an hour.</p>
Vision	<p>Replace the vision settings in the terminals with the site's current vision settings.</p> <p>Use this when you have changed your site's vision settings and you do not see the updated settings on the terminal within an hour.</p>


Field	Description
Vision Content	<p>Replace the vision advertisement content in the terminals with the site's current vision content.</p> <p>Use this when you have changed your site's vision content and you do not see the updated settings on the terminal within an hour.</p>
Vision Images	<p>Replace the vision images in the terminals with the site's current vision images.</p> <p>Use this when you have changed your site's vision images and you do not see the updated settings on the terminal within an hour.</p>
Vision Mirror	<p>Copy the Vision images to all other Portal web servers.</p>
Voucher Setup - POS / Base Station	<p>Replace the voucher configurations on the Point of Sale terminals and base station with the site's current voucher configurations.</p> <p>Use this when you have changed the type or settings of voucher types and you do not see the updated settings on the terminal within an hour.</p>
Vouchers - POS / Base Station	<p>Replace the voucher information on the Point of Sale terminals and base station with the site's current voucher information.</p> <p>Use this when you have changed the vouchers listed for your site and you do not see the updated settings on the terminal within an hour.</p>

Release File report

Use the Release File report access POSPortal software and user exit files.

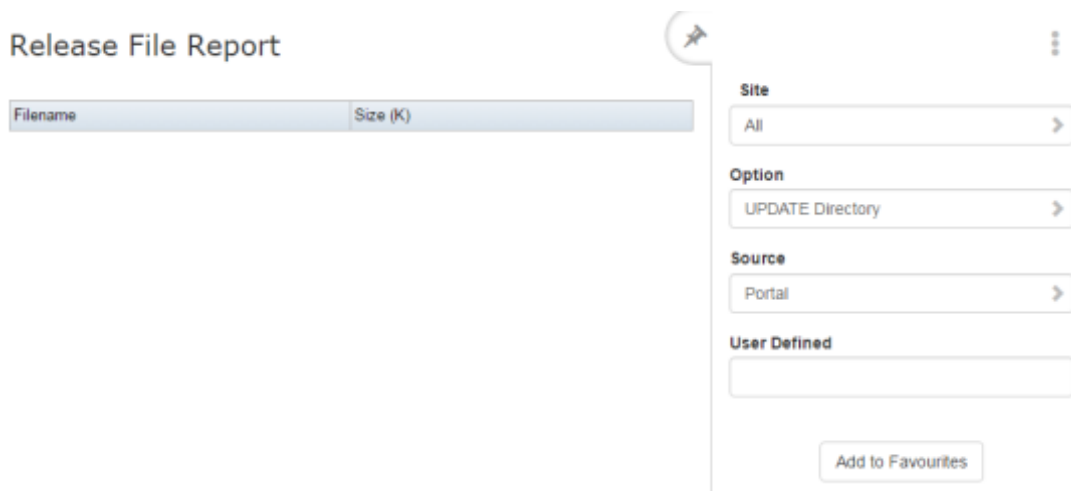
Opening the Release File report

To open the Release File report:

1. Press  **Company** from the menu bar.
2. Press **Support > Downloads > Set Upgrade**.



The Release File report is displayed.



Release File report key fields

Filters area

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

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Option	These options are controlled by AMC Convergent IT.
Source	Select the source from which to download the release.
User Defined	Select the parameters for distributing the release.

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 / Filename	Name of the software, document or Portal system file available. Press to download this file to your computer.
Size (K)	The size of the file.

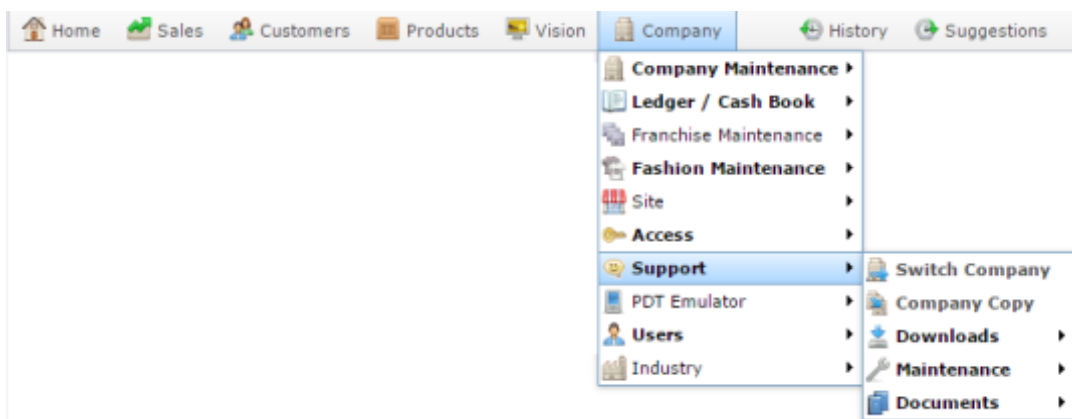
Switching companies

Switch companies to change which company you view and affect with reports and maintenance screens.

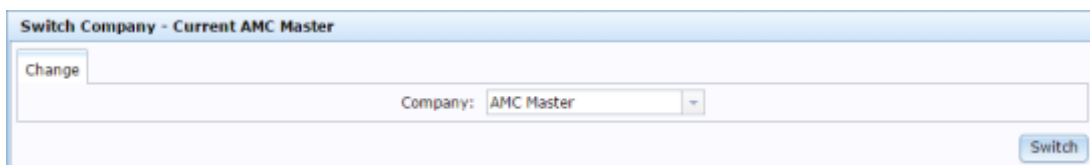
Note: This action is only available if you have more than one company on the Portal, and you have permission to access other companies.

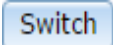
To switch companies:

1. Press  Company in the main menu bar.
2. Press Users > Support > Switch Company.



The Switch Companies screen is displayed



3. Select the company you want to view or change in the Company drop-down field.
4. Press .

Your session is switched to the selected company.


Switch Companies screen

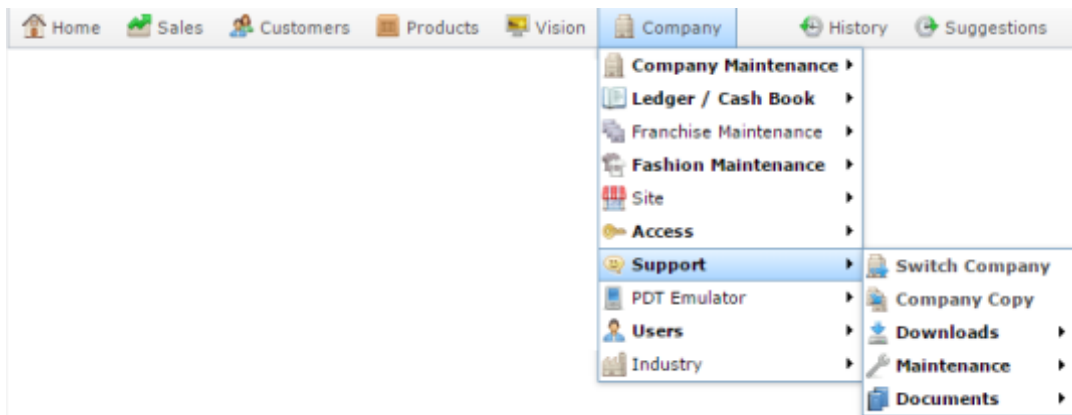
Switch companies to change which company you view and affect using reports and maintenance screens.

Note: This option is only displayed if you have more than one company on the Portal, and you have permission to access other companies.

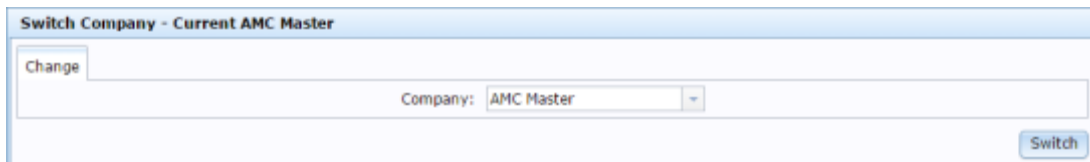
Opening the Switch Companies screen

To open the Switch Companies screen:

1. Press  Company in the main menu bar.
2. Press Users > Support > Switch Company.



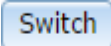
The Switch Companies screen is displayed



Switch Companies screen key fields and buttons

Field	Description
Company	Select the company to switch to.


Note: You must have permission to access the company you select.

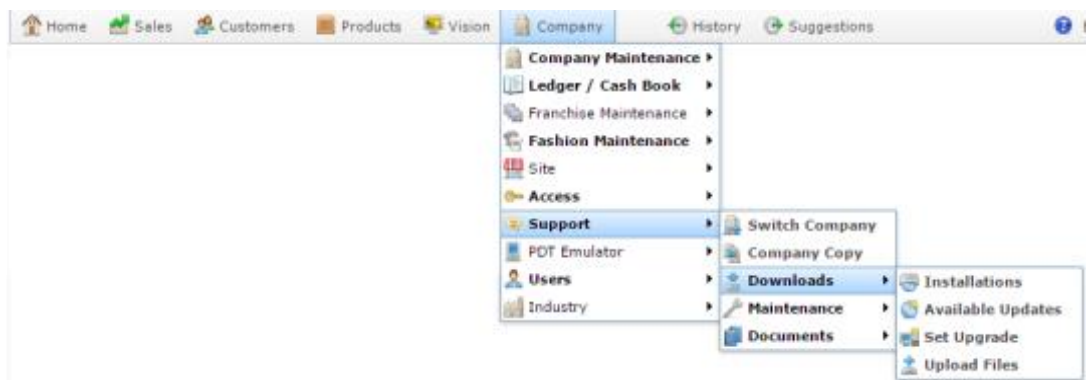
Field	Description
	Press to switch to the selected company.

Uploading files into a company

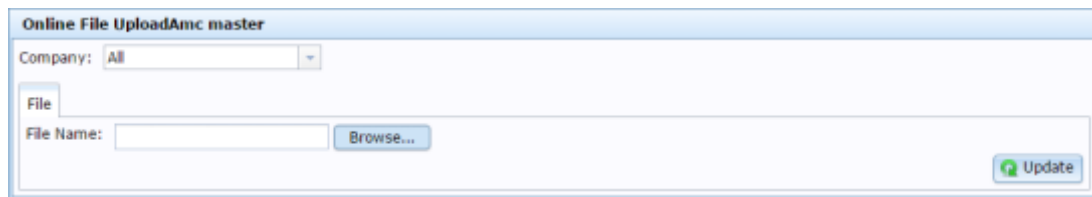
Upload files from your local computer into a the company area of your user account to make them accessible in the Portal.

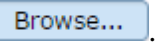
To upload files:

1. Press  **Company** from the menu bar.
2. Press **Support > Downloads > Upload File**.

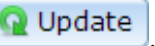


The Online File Upload screen is displayed.



3. Select the company you want to upload to in the **Company** drop-down field.
4. Press .

The File Chooser screen is displayed.

5. Select the file you want to upload from your computer.
6. Press .


The Portal uploads the file to the specified company.

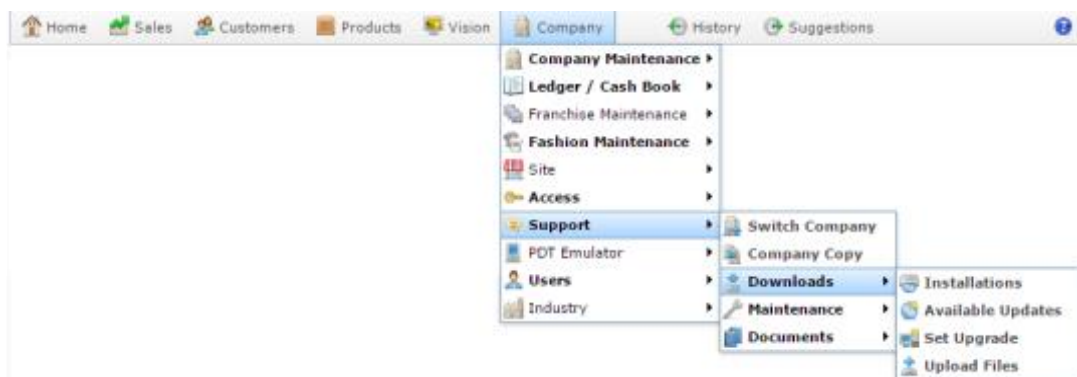
Online File Upload screen

Use this screen to upload files into a specified company of the Portal.

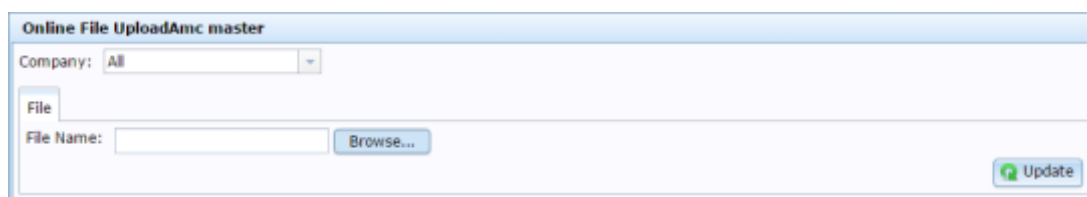
Opening the Online File Upload screen

To open the Online File Upload screen:

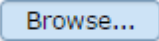
1. Press  Company from the menu bar.
2. Press Support > Downloads > Upload Files.

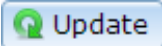


The Online File Upload screen is displayed.



Online File Upload screen key fields and buttons

Field	Description
Company	The company to upload the file to.
Filename	The name of the file to import.
	Press to open the file chooser and find your import file.

Field	Description
 Update	Import the selected file.

Managing your sites

The Portal provides you with many tools with which to manage the function of your site.

Managing site details

You can create and manage the details of sites, including enforcing compliance mode, changing the language and finding the serial number for Point of Sale terminals to connect to the site.

- *Creating a new site* on page 59.
- *Editing a site* on page 63.
- *Changing your site language* on page 61.
- *Enforcing NMI compliance* on page 65.
- *Finding your site serial number* on page 67.
- *Deactivating a site* on page 69
- *.Site Maintenance screen* on page 71.
- *Site Details report* on page 86

Configuring your site options

You can configure how many of the Portal systems work for a particular site.

- *Configuring cashups for your site* on page 90.
- *Configuring costs for your site* on page 95.
- *Configuring creditor contracts for your site* on page 98.
- *Configuring Customer Orders for your site* on page 102.
- *Configuring debtor contracts for your site* on page 106.
- *Configuring debtors for your site* on page 109.
- *Configuring departments for your site* on page 112.
- *Configuring home delivery for your site* on page 115.
- *Configuring inventory options for your site* on page 118.
- *Configuring labels for your site* on page 120.
- *Configuring your site for loyalty* on page 124.
- *Configuring Metcash for your site* on page 127.
- *Configuring micro loans for your site* on page 130.
- *Configuring calendar options for your site* on page 133.
- *Configuring packs for your site* on page 135.

- *Configuring PDT sales for your site* on page 138.
- *Configuring purchase order options for your site* on page 141.
- *Configuring stock receipting options for your site* on page 144.
- *Configuring stock returns for your site* on page 152.
- *Configuring sales targets for your site* on page 156.
- *Configuring the scheduler for your site* on page 159.
- *Configuring serial numbers for your site* on page 163.
- *Configuring stock take for your site* on page 166.
- *Configuring table service for your site* on page 169.
- *Configuring tenants for your site*
- *Configuring voucher enquiries for your site* on page 173.
- *Configuring WEB customer orders for your site* on page 176.
- *Site Options report* on page 181.

Terminal configurations

You can configure settings to control the terminals and PDTs.

- *POSIni File Options Maintenance screen* on page 184.

Other site configurations

You can configure the inventory and procurement systems for your site.

- *Configuring inventory and procurement for your site* on page 212.
- *Configuring supplier types for your sites* on page 214.

Data transfers

You can transfer data from one Portal to another, or view the updates from the Portal that are still pending for your site and terminals.

- *Checking pending site updates* on page 216.
- *Checking pending terminal updates* on page 217.
- *Transferring data between portals* on page 218.
- *Transfers Between Portals report* on page 222.
- *Database Transfer Maintenance screen* on page 226.

Configuring tenders

Configure the tender types that are accepted by the site's terminals, including authorisation, cash out, over tendering and surcharge rules for each tender.

See: *Managing tenders* on page 313

Site hours, targets, budgets and reports

You can configure the hours a site opens, staff budgets and sales targets for each day, and collate reports from managers and Point of Sale operators.

- *Setting store hours for the month* on page 230.
- *Store Times Maintenance screen* on page 232.
- *Setting a staff budget for the month* on page 234.
- *Store Times Maintenance screen* on page 232.
- *Setting sales targets by the hour* on page 238.
- *Sales Targets Maintenance screen* on page 240.
- *Creating a manager report* on page 242.
- *Editing a manager report* on page 244
- *Finalising a manager report* on page 246.
- *Deleting a manager report* on page 248.
- *Manager Report Maintenance screen* on page 250
- *Cashier report* on page 255.
- *Sites Manager report* on page 252.
- *Sites Operator report* on page 258.
- *Editing a point of sale promotion receipt* on page 261.
- *Disabling a point of sale promotion receipt* on page 263.
- *POS Promotion File Maintenance screen* on page 265.

Temperature measurements

Configure the points at which temperature is measured at your site, for the storage of temperature-sensitive goods. You can then record temperatures on a regular basis, and the Portal will issue notifications if a temperature falls outside the boundaries.

- *Creating a new temperature measuring point* on page 268.
- *Editing a new temperature measuring point* on page 270.
- *Deleting a temperature measuring point* on page 272.
- *Temperature Collection Point Maintenance screen* on page 274.
- *Temperature Point report* on page 277.

- *Creating a new temperature measurement* on page 281.
- *Editing a temperature measurement* on page 283.
- *Deleting a temperature measurement* on page 285.
- *Temperature Editor screen* on page 287.
- *Temperature History report* on page 290.

Other site reports

- *Site Details Contacts report* on page 293.
- *Sites Trading Details report* on page 297.
- *Sites Details report* on page 300.
- *Site Details IP Addresses report* on page 304.
- *Terminal Information report* on page 308.

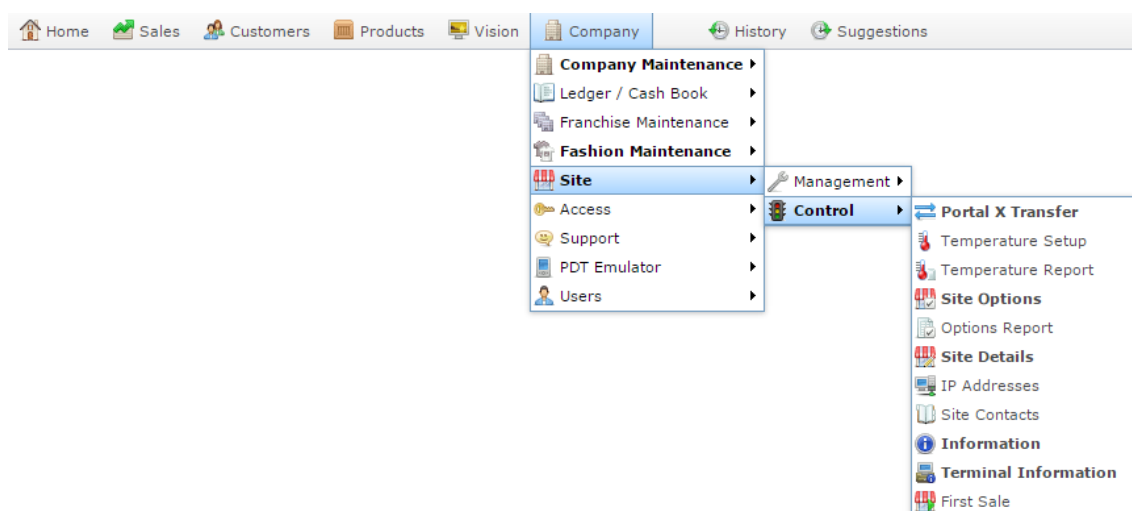
Creating a new site

Create a new site to represent a separate location that performs transactions. A location may be a physical store, or it may represent an online store.

Note: Sites are created by your Portal administrator, or AMC Convergent IT staff. Site serial numbers are allocated by AMC Convergent IT.

To create a new site:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Site Details**.



The Site Details report is displayed.

Site Details

Name	Site	Store #	Comp	Busini Unit	Type	Post Code	Regist Key	Chang Date	Expiry Date	Conta	Active	Base Station
Create New Site			AMC Maste									
AMC	1	3	AMC Maste [-1]	Disabl	Whole	3004	Test 952-17108	10-Nov-15977	17-May-2007		✓	uCfrB
Apple Demo	300	300	Apple Store [20]	Disabl	Retail	3000	iZenP Apple Demo 952-17108	20-Sep-30484	12-Nov-2006		✓	sk2.zε

States: All

Add to Favourites

3. Press **Create New Site**.

The Site Maintenance screen is displayed.

The screenshot shows the 'Site Maintenance' window with the 'Name' tab selected. The form contains the following fields and values:

- Company: AMC Master (dropdown)
- Site: (empty text box)
- Site Name: (empty text box)
- Type: Retail (dropdown)
- Store #: (empty text box)
- Region: Bob (dropdown)
- Language: Australian (dropdown)
- ABN: (empty text box)
- GSA Venue #: (empty text box)
- Registered Name: (empty text box)
- Serial Number: (empty text box)

At the bottom right of the form are three buttons: 'Find' (with a magnifying glass icon), 'New' (with a plus icon), and 'Save' (with a floppy disk icon).

4. Select the company the site belongs to in the **Company** drop-down field.
5. Type a description for the site in the **Site** field.
6. Type a unique number to identify the site within the Portal in the **Site Number** field.
7. Select the type of site from the **Type** drop-down field.
8. Configure the other fields as required.

See *Site Maintenance screen* on page 71.

9. Press  **Save**.

The new site is created.

Tip: You can import inventory and other information from existing sites using the Copy Site feature. See *Copying information across sites* on page 23.

Changing your site language

Change your site language to change:

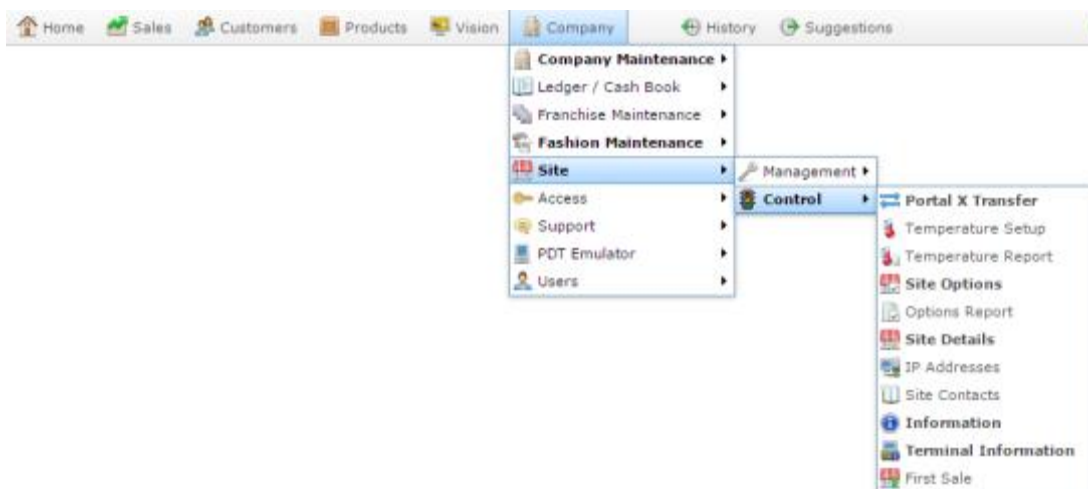
- The language and currency that the Point of Sale displays.
- The currency reported by the site in the Portal multiple currency reporting mode.

For example, if your site is set to USD and your company uses AUD, the Portal multi currency reports convert the USD into AUD using the configured conversion rate.

Note: This does not convert any currency value on the Point of Sale itself. It just changes the currency symbol that is displayed.

To change your site language:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Site Details**.



The Site Details report is displayed.

Site Details

Name	Site	Store #	Comp. Unit	Busin Type	Post Code	Regist Key	Chang Date	Expiry Date	Contai	Active	Base Stati
Creat New Site			AMC Mast								
AMC	1	3	AMC Mast [-1]	Disabl Whole	3004	Test 952-17108	10-11 Nov-2016	17-May-2007		✓	uCfrBl
Apple Demo	300	300	Apple Store [20]	Disabl Retail	3000	iZenP Apple 952-17108	20-Sep-2014	12-Nov-2006		✓	sk2 z€

States: All

Add to Favourites

3. Press the **Name** of the site you want to view.

The Name tab of the Site Maintenance screen is displayed.

The screenshot shows a web application window titled "Site Maintenance". At the top, there are several tabs: "Name", "Address", "Billing Address", "Contact", "Account", "Control", "Terminals", and "PDTs". The "Name" tab is currently selected. Below the tabs, there is a form with the following fields and values:

Company:	Example Company
Site:	Chadstone
Site Number:	500
Site Name:	Chadstone
Type:	Retail
Store #:	
Region:	None
Language:	Australian
ABN:	
GSA Venue #:	0
Registered Name:	QA Chadstone
Serial Number:	952-171084-2331155

At the bottom right of the form, there are three buttons: "Find", "New", and "Save".

4. Select the language you want in the **Language** drop-down field.

5. Press  **Save**.

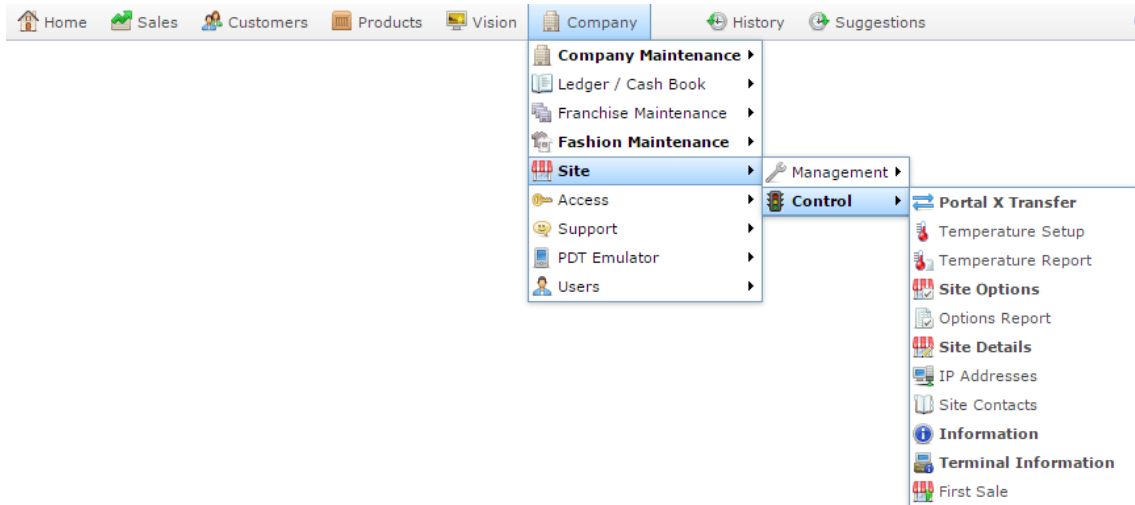
The changes are saved.

Editing a site

Edit a site to change the billing address or edit the rules that control the site.

To edit a site:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Site Details**.



The Site Details report is displayed.

Site Details

Name	Site	Store #	Comp	Busini Unit	Type	Post Code	Regist Key	Chang Date	Expiry Date	Contac	Active	Base Station
Create New Site			AMC Maste									
AMC	1	3	AMC Maste [-1]	Disabl Whole	3004	Test	952-17108	10-15977	2016	17-May-2007	✓	uCfrBl
Apple Demo	300	300	Apple Store [20]	Disabl Retail	3000	iZenP Apple Demo	952-17108	20-Sep-30484	2014	12-Nov-2006	✓	sk2.zε

States

All

Add to Favourites

3. Press the **Name** of the site you want to edit.

The Site Maintenance screen is displayed.

Site Maintenance

Name Address Billing Address Contact Account Control Terminals PDTs

Company: Example Company

Site: Chadstone

Site Number: 500

Site Name: Chadstone

Type: Retail

Store #:

Region: None

Language: Australian

ABN:

GSA Venue #: 0

Registered Name: QA Chadstone

Serial Number: 952-171084-2331155

Find New Save

4. Edit the required fields.

See *Site Maintenance* screen on page 71.

5. Press .

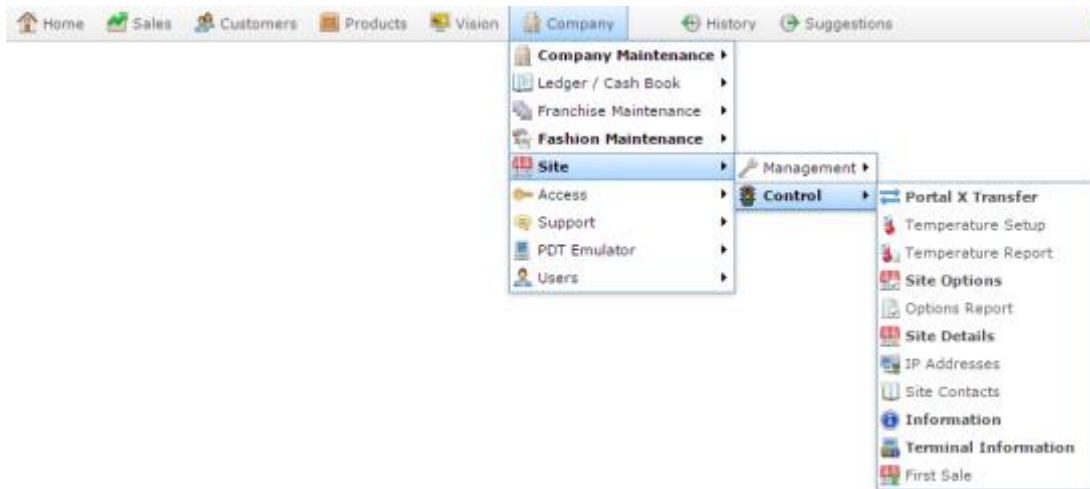
The changes are saved.

Enforcing NMI compliance

If your Point of Sale must adhere to the compliance certification, you can enforce Compliance Mode in the iZen Point of Sale from the Portal.

To enforce compliance mode:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Site Details**.



The Site Details report is displayed.

Site Details

Name	Site	Store #	Comp	Busin Unit	Type	Post Code	Regist Key	Chang Date	Expiry Date	Contai	Active	Base Station
Create New Site			AMC	Maste								
AMC	1	3	AMC	Disabl	Whole	3004	Test	952-17108	10-Nov-2016	17-May-2007	✓	uCfrBl
Apple Demo	300	300	Apple	Disabl	Retail	3000	iZenP-Apple Demo	952-17108	20-Sep-2014	12-Nov-2006	✓	sk2 ze

States: All

Add to Favourites

3. Press the **Name** of the site you want to view.

The Name tab of the Site Maintenance screen is displayed.

Site Maintenance

Name Address Billing Address Contact Account **Control** Terminals PDTs

Company: Example Company

Site: Chadstone

Site Number: 500

Site Name: Chadstone

Type: Retail

Store #:

Region: None

Language: Australian

ABN:

GSA Venue #: 0

Registered Name: QA Chadstone

Serial Number: 952-171084-2331155

Find New Save

4. Press the Control tab.

The Control tab is displayed.

Site Maintenance

Name Address Billing Address Contact Account **Control** Terminals PDTs

VNC Password:

Base Station: uCfrsNFa|192.168

Video Offset: 80

Active: True

Enable ASP: False

Blind Cashup: False

Enable Kiosk: False

Enable Compliance: False

iZenPos Cashdrawer Mapping: Map to Site

Use Trade Date: True

Pass Phrase:

Maximum Terminals: Unlimited

Find New Save

5. Select True in the Enable Compliance drop-down field.

6. Press  Save.

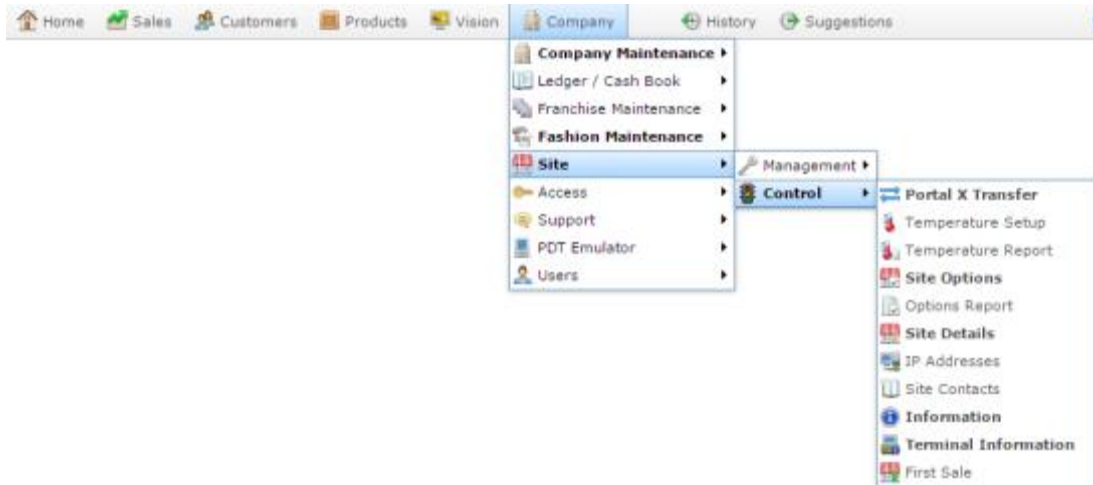
The changes are saved.

Finding your site serial number

Your site serial number is needed for any Point of Sale terminals to connect to your site.

To find your site serial number:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Site Details**.



The Site Details report is displayed.

Site Details

Name	Site	Store #	Comp	Busin Unit	Type	Post Code	Regist Key	Chang Date	Expiry Date	Contai	Active	Base Station
Creat New Site			AMC	Maste								
AMC	1	3	AMC	Disabl	Whole	3004	Test	952-17108	20-11-2007		✓	uCrBl
Apple Demo	300	300	Apple	Disabl	Retail	3000	iZenP Demo	952-17108	20-09-2006		✓	sk2 zc

States: All

Add to Favourites

3. Press the **Name** of the site you want to view.

The Name tab of the Site Maintenance screen is displayed.

Site Maintenance

Name Address Billing Address Contact Account Control Terminals PDTs

Company: Example Company

Site: Chadstone

Site Number: 500

Site Name: Chadstone

Type: Retail

Store #:

Region: None

Language: Australian

ABN:

GSA Venue #: 0

Registered Name: QA Chadstone

Serial Number: 952-171084-2331155

Find New Save

4. Locate the **Serial Number** field at the bottom.

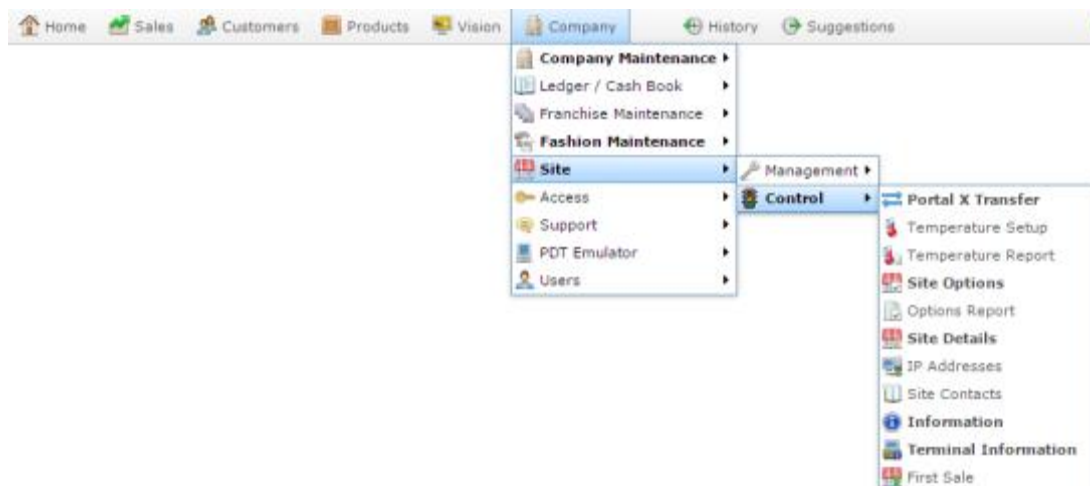
Deactivating a site

Deactivate a site when you don't want it used in the Portal.

Note: Sites cannot be deleted.

To deactivate a site:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Site Details**.



The Site Details report is displayed.



The screenshot shows the 'Site Details' report. It features a table with columns for Name, Site #, Store, Comp Unit, Busin Type, Post Code, Regist Key, Chang Date, Expiry Date, Contai, Active, Base, and Station. Below the table is a 'States' dropdown menu set to 'All' and an 'Add to Favourites' button.

Name	Site #	Store	Comp Unit	Busin Type	Post Code	Regist Key	Chang Date	Expiry Date	Contai	Active	Base	Station
Create New Site			AMC Maste									
AMC	1	3	AMC Maste [-1]	Disabl Whole	3004	Test	952-17108	10-17-15977	2016	2007	✓	uCrBl
Apple Demo	300	300	Apple Store [20]	Disabl Retail	3000	iZenP Apple Demo	952-17108	20-17108	12-Sep-2014	2006	✓	sk2 ze

3. Press the **Name** of the site you want to deactivate.

The Site Maintenance screen is displayed.

Site Maintenance

Name Address Billing Address Contact Account **Control** Terminals PDTs

Company: Example Company

Site: Chadstone

Site Number: 500

Site Name: Chadstone

Type: Retail

Store #:

Region: None

Language: Australian

ABN:

GSA Venue #: 0

Registered Name: QA Chadstone

Serial Number: 952-171084-2331155

Find New Save

4. Press the **Control** tab.

The **Control** tab is displayed.

Site Maintenance

Name Address Billing Address Contact Account **Control** Terminals PDTs

VNC Password:

Base Station: uCfrsNFa|192.168

Video Offset: 80

Active: True

Enable ASP: False

Blind Cashup: False

Enable Kiosk: False

Enable Compliance: False

iZenPos Cashdrawer Mapping: Map to Site

Use Trade Date: True

Pass Phrase:

Maximum Terminals: Unlimited

Find New Save

5. Select **False** in the **Active** drop-down field.

6. Press  **Save**.

The site is deactivated.

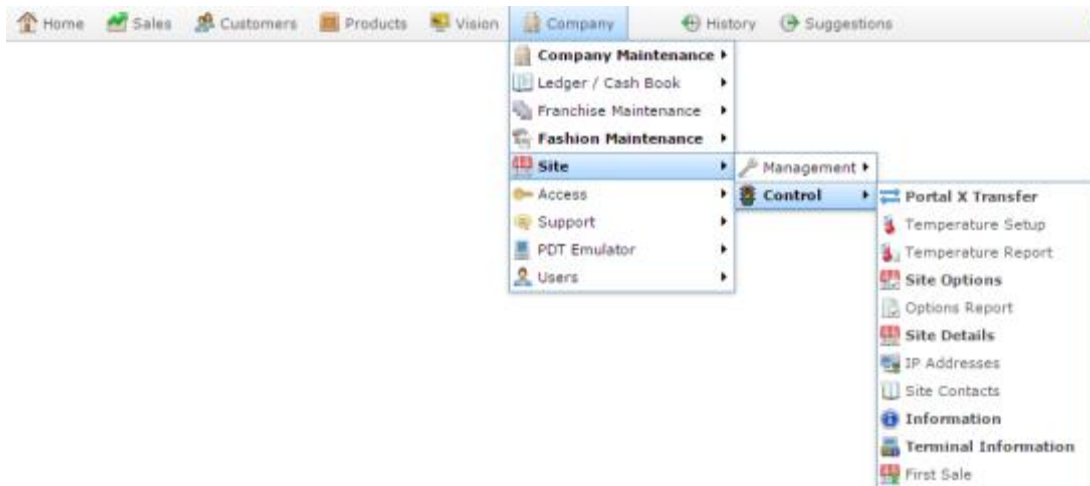
Site Maintenance screen

Use this screen to maintain details about your company's sites.

Opening the Site Maintenance screen

To open the Site Maintenance screen:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Site Details**.



The Site Details report is displayed.

Site Details

Name	Site	Store #	Comp Unit	Busin Type	Post Code	Regist Key	Chang Date	Expiry Date	Contai	Active	Base Station
Create New Site			AMC Mast								
AMC	1	3	AMC Mast [-1]	Disabl Whole	3004	Test	952-17108	10-15977	2016	17-2007	✓ uCfrBl
Apple Demo	300	300	Apple Store [20]	Disabl Retail	3000	iZenP Apple Demo	952-17108	20-30484	2014	12-2006	✓ sk2 ze

States: All

Add to Favourites

3. Press the **Name** of the site you want to view.

The Name tab of the Site Maintenance screen is displayed.

Site Maintenance

Name Address Billing Address Contact Account Control Terminals PDTs

Company: Example Company

Site: Chadstone

Site Number: 500

Site Name: Chadstone

Type: Retail

Store #:

Region: None

Language: Australian

ABN:

GSA Venue #: 0

Registered Name: QA Chadstone

Serial Number: 952-171084-2331155

Find New Save

Site Maintenance screen key fields and buttons

Name tab

Use this area to control the site name, type and other information.

Site Maintenance

Name Address Billing Address Contact Account Control Terminals PDTs

Company: Example Company

Site: Chadstone

Site Number: 500

Site Name: Chadstone

Type: Retail

Store #:

Region: None

Language: Australian

ABN:

GSA Venue #: 0

Registered Name: QA Chadstone

Serial Number: 952-171084-2331155

Find New Save

Field

Description

Company

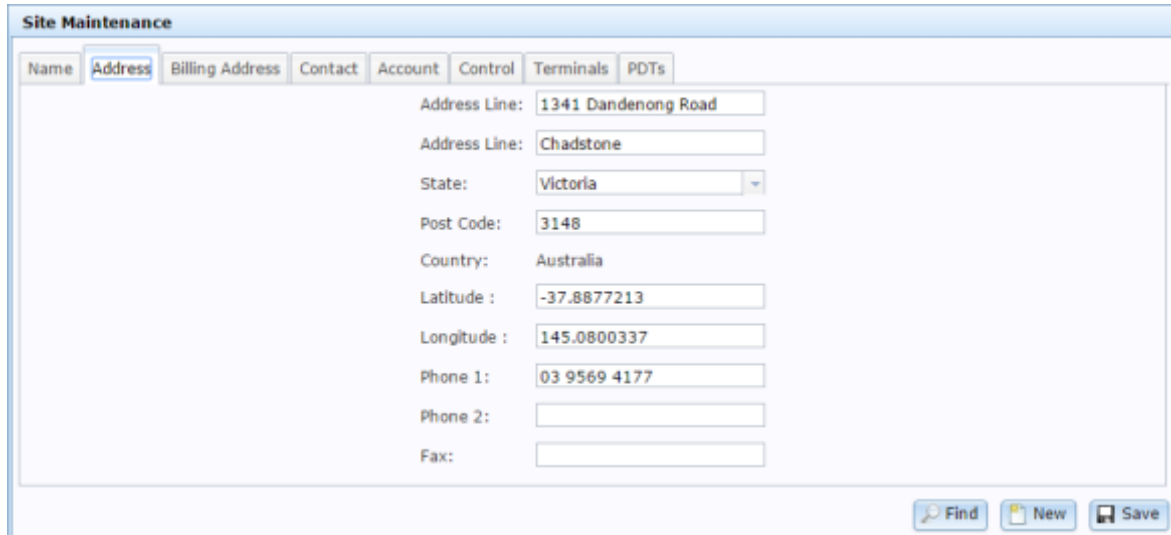
Select the company this site belongs to.

Field	Description
Site	Select the site you want to edit.
Site Number	Unique code identifying the site.
Site Name	Name of the site.
Type	Select the type of site: <ul style="list-style-type: none"> <li data-bbox="528 786 647 813">▪ Retail. <li data-bbox="528 842 711 869">▪ Wholesale. <li data-bbox="528 898 695 925">▪ Franchise. <li data-bbox="528 954 719 981">▪ Food Court. <li data-bbox="528 1010 711 1037">▪ Web Store. <div data-bbox="472 1048 1390 1178" style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px; margin-top: 10px;"> <p data-bbox="504 1081 1310 1149">Note: MLA Retail type enforces the MLA Reference on your site. Other types are used for Portal reporting.</p> </div>
Store #	The store number that identifies this store within your company, if you use an identifying other than the site code.
Region	Select the region this site belongs to.
Language	Select the language to use at this site.
ABN	Type the business registration number for this site.
GSA Venue #	Type the unique code that identifies this site as a Gambler's Subtle Assist venue.

Field	Description
Registered Name	Type the registered business name for this site.
Serial Number	The serial number used to log iZen terminals into this site.

Address tab

Use this area to control the address details of the site.



The screenshot shows a web application window titled "Site Maintenance". At the top, there are several tabs: "Name", "Address" (which is selected), "Billing Address", "Contact", "Account", "Control", "Terminals", and "PDTs". Below the tabs, the form contains the following fields:

- Address Line: 1341 Dandenong Road
- Address Line: Chadstone
- State: Victoria (dropdown menu)
- Post Code: 3148
- Country: Australia
- Latitude: -37.8877213
- Longitude: 145.0800337
- Phone 1: 03 9569 4177
- Phone 2: (empty)
- Fax: (empty)

At the bottom right of the form, there are three buttons: "Find", "New", and "Save".

Field	Description
Address Line	The first line of your site's postal address.
Address Line	The second line of your site's postal address.
State	The state your site is located in.
Post Code	The post code or zip code of your state.
Country	The country your state is located in.
Latitude	The latitude GPS coordinates of your site.
Longitude	The longitude GPS coordinates of your site.

Field	Description
Phone 1 / Phone 2	The phone numbers for your site.
Fax	The fax number of your site.

Billing Address tab

Use this area to control the billing address used for this site.

The screenshot shows a web application window titled "Site Maintenance". It features a series of tabs: "Name", "Address", "Billing Address" (which is the active tab), "Contact", "Account", "Control", "Terminals", and "PDTs". The "Billing Address" tab contains the following fields:

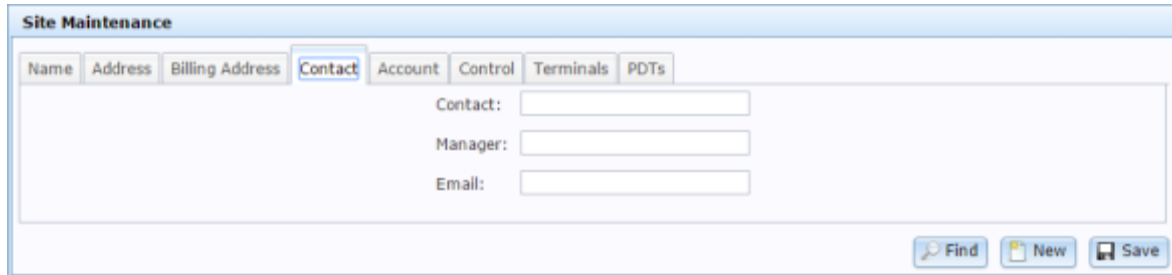
- Address Line: (empty text box)
- Address Line: (empty text box)
- State: (dropdown menu showing "Victoria")
- Post Code: (text box containing "3000")
- Country: (dropdown menu showing "Australia")

At the bottom right of the window, there are three buttons: "Find", "New", and "Save".

Field	Description
Address Line	The first line of your site's billing address.
Address Line	The second line of your site's billing address.
State	The state your site's billing address is located in.
Post Code	The post code or zip code of your state's billing address.
Country	The country your site's billing address is located in.

Contact tab

Use this area to define the name and email address of the person in charge of this site.

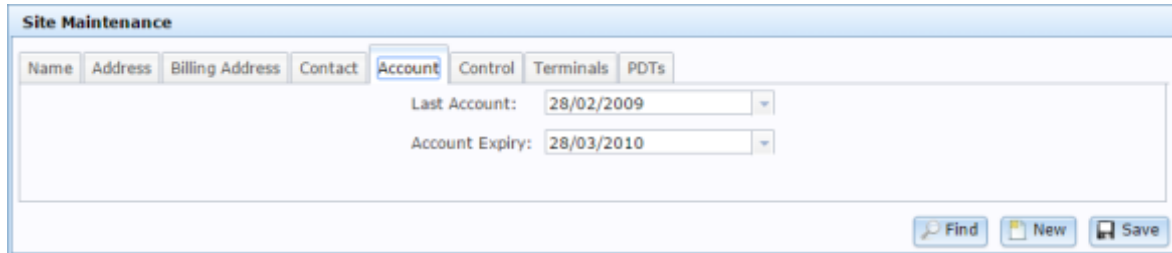


The screenshot shows a web application window titled "Site Maintenance". At the top, there is a navigation bar with tabs: "Name", "Address", "Billing Address", "Contact" (which is highlighted), "Account", "Control", "Terminals", and "PDTs". Below the tabs, there are three input fields labeled "Contact:", "Manager:", and "Email:". At the bottom right of the form area, there are three buttons: "Find", "New", and "Save".

Field	Description
Contact	The name of the person to contact regarding this site.
Manager	The name of the site manager.
Email	The email address to use to contact this site.

Account tab

Use this area to control the account details of this site.

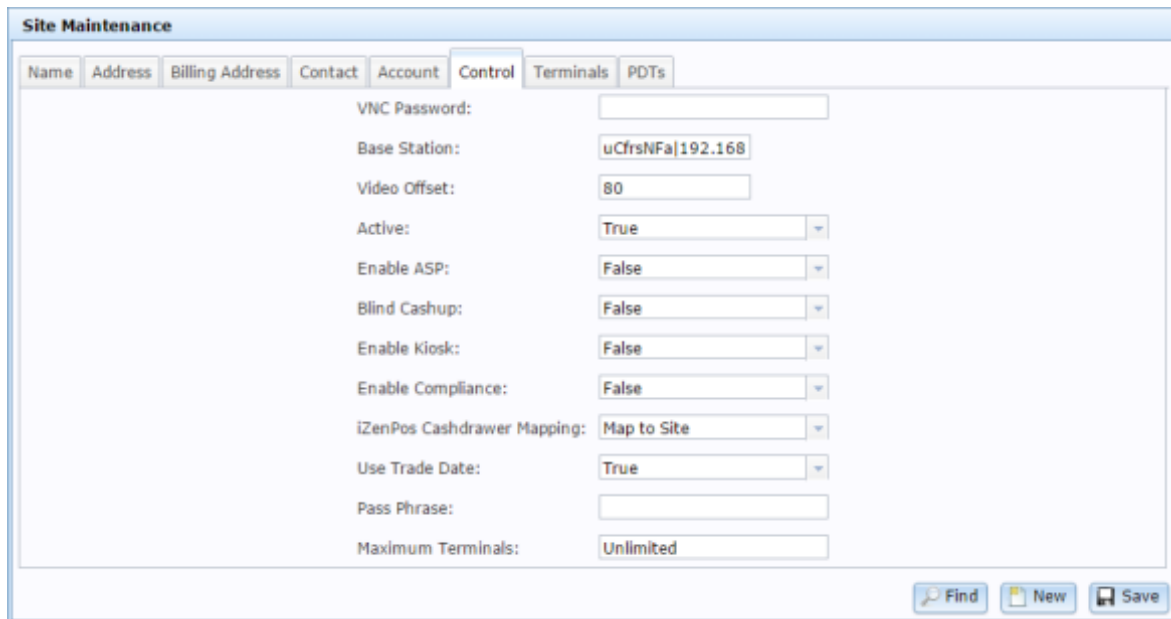


The screenshot shows a web application window titled "Site Maintenance". At the top, there are several tabs: "Name", "Address", "Billing Address", "Contact", "Account" (which is selected and highlighted), "Control", "Terminals", and "PDTs". Below the tabs, there are two dropdown menus: "Last Account:" with the value "28/02/2009" and "Account Expiry:" with the value "28/03/2010". At the bottom right of the window, there are three buttons: "Find" (with a magnifying glass icon), "New" (with a document icon), and "Save" (with a floppy disk icon).

Field	Description
Last Account	The date the iZen Point of Sale subscription was last renewed.
Account Expiry	The date the iZen Point of Sale subscription expires.

Control tab

Use this area to control some of the rules by which this site operates.



The screenshot shows the 'Site Maintenance' window with the 'Control' tab selected. The fields and their values are:

Field	Value
VNC Password:	
Base Station:	uCfrsNFa 192.168
Video Offset:	80
Active:	True
Enable ASP:	False
Blind Cashup:	False
Enable Kiosk:	False
Enable Compliance:	False
iZenPos Cashdrawer Mapping:	Map to Site
Use Trade Date:	True
Pass Phrase:	
Maximum Terminals:	Unlimited

Buttons at the bottom right: Find, New, Save.

Field	Description
VNC Password	Password for the remote VNC support service.
Base Station	URL for the site base station.
Video Offset	Used to offset the video feed of some security cameras.
Active	Select if this site is currently active.
Enable ASP	Select True to allow the site to update terminals.
Blind Cashup	What is blind cashup?

Field	Description
Enable Kiosk	Select true to allow a kiosk to be used with this site.
Enable Compliance	Select True to force the iZen Point of Sale to use compliance mode.
iZenPos Cashdrawer Mapping	<p>Select how transactions are mapped in the iZen Point of Sale:</p> <p>Site Map all transactions from this site to a single operator with a system ID of 1.</p> <p>Use this when you do not want to differentiate transactions by operator.</p>
	<p>Operator Map all transactions from this site to the operator who was logged in to the terminal for the transaction.</p> <p>Use this when you want to record which operator performed a transaction.</p>
	<p>Terminal Map all transactions from this site to an operator matching the terminal number.</p> <p>Use this when you want to record which terminal a transaction occurred on.</p>
Use Trade Date	<p>Type True to allow a trading day to go past midnight. For example, a trading day may run from 5am to 5am, if you store trades past midnight.</p> <p>Type False to use midnight-to-midnight trading dates.</p>
Pass Phrase	Type the pass phrase used for the iZen Point of Sale integrated Tyro EFTPOS system.

Field	Description
Maximum Terminals	Maximum number of terminals that can exist at this site.

Terminals tab

Use this area to view the terminal information for this site.

Site Maintenance														
Name	Address	Billing Address	Contact	Account	Control	Terminals	PDTs							
Terminal	Terminal	Updates Enabled	Last Conn	Last Sale	Last Journ	Remote I	Internal I	Laptop	Has Web	Type	Size	Disk Spac	Version	
Create No														
Terminal	1	Yes	21/07/20			110.77.1	192.168.	No	No	Normal	General	9,204	4.116b	
Terminal	3		17/02/20						No	Normal	General			
Terminal	5		29/06/20						No	Normal				
Terminal	7		7/06/201						No	Normal				
Terminal	8		8/09/201						No	Normal				
Base Stat	10	Yes	12/12/20			203.217.	192.168.	No	No	Base Stat	General	3,046	B2.36	
Terminal	12		7/09/201	18/07/20	1				No	Normal				
Terminal	14		7/09/201	7/09/201	52				No	Normal				
Terminal	15		19/10/20	19/10/20	1				No	Normal				
Terminal	16		1/12/201	28/11/20	1				No					
Terminal	21								No	Normal	General			
Terminal	22		7/07/201						No	Normal				

Field	Description
Terminal	Description of the terminal.
Terminal Number	Unique code identifying the terminal in transactions.
Updates Enabled	This terminal automatically receives updates from the Portal.
Last Connected	Date the terminal was last connected to the Portal.
Last Sale	Date the terminal last processed a sale.

Field	Description
Last Journal	Date the terminal last completed a transaction. Note: Transactions may include non-sale actions such as pushing a price change to the Portal.
Remote IP	External IP address of the terminal.
Internal IP	Internal IP address of the terminal.
Laptop	Indicates whether this terminal is a laptop.
Has Webcam	Indicates whether this terminal has a web-enabled video camera.
Type	The type of terminal. Either: <ul style="list-style-type: none"> ▪ Normal: A terminal that displays the Point of Sale and processes transactions. ▪ Base Station: coordinates the terminals and processes data before it is transmitted to or from the Portal.
Size	Screen size of the terminal.
Disk Space	Amount of disk space available on the terminal when using a Windows operating system, or on a base station. Note: This information is not available for iPad devices.
Version	Version of the Point of Sale this terminal is running. Note: This applies only to base stations.

PDTs tab

Use this area to view the PDT information for this site.

The screenshot shows a web application window titled "Site Maintenance". At the top, there is a navigation bar with tabs for "Name", "Address", "Billing Address", "Contact", "Account", "Control", "Terminals", and "PDTs". The "PDTs" tab is selected. Below the navigation bar is a table with three columns: "PDT", "PDT #", and "PDT IP". The first row contains the text "Create New PDT". The second row contains "PDT 1" in the "PDT" column and "1" in the "PDT #" column. The "PDT IP" column is empty. At the bottom right of the window, there are three buttons: "Find", "New", and "Save".

Field	Description
PDT	Name of the PDT
PDT #	Unique code identifying the PDT.
PDT IP	IP address of the PDT.

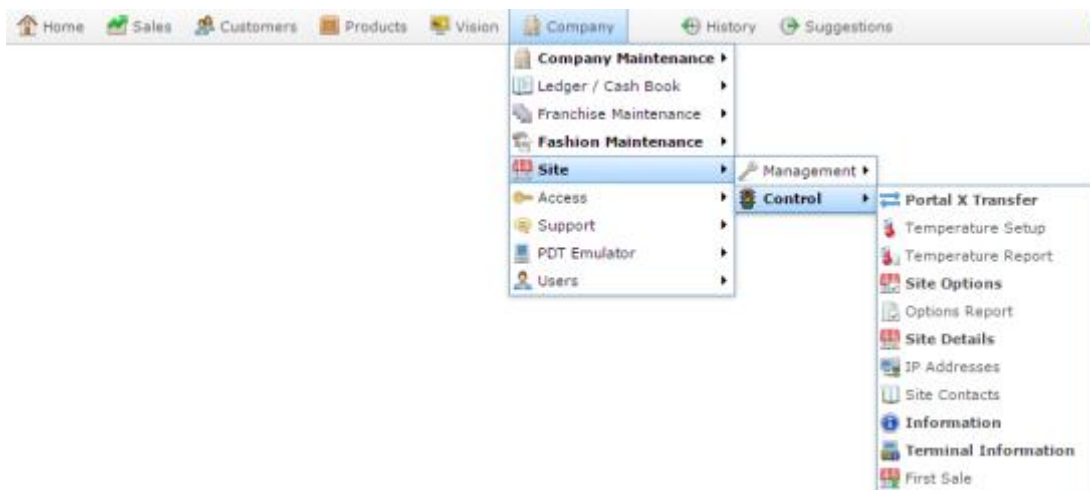
Site Details report

Use the Site Details report to view the settings for sites and open the Site Maintenance screen.

Opening the Site Details report

To open the Site Details report:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Site Details**.



The Site Details report is displayed.

Site Details

Name	Site	Store #	Comp Unit	Busin Type	Post Code	Regist Key	Chang Date	Expiry Date	Contai	Active	Base Station
Create New Site			AMC Mast								
AMC	1	3	AMC Mast [-1]	Disabl Whole	3004	Test	952-17108	10-Nov-2007		✓	uCrBl
Apple Demo	300	300	Apple Store [20]	Disabl Retail	3000	iZenP Apple Demo	952-17108	20-Sep-2014		✓	sk2 ze

States: All

Add to Favourites

Site Details report key fields

Filters area

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

Field	Description
<input type="button" value="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.

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	Name of the site. Press this to open Site Maintenance for this site.
Site	Unique code identifying the site.
Store #	Code identifying the store within your company.
Company	Company the site belongs to.
Business Unit	Business unit this company belongs to, if applicable.
Type	Type of site, for example Retail or Wholesale.
Post Code	Post code of the site address.
Registered Name	Registered business name for this site.

Field	Description
Key	Serial number for terminals to log into this site.
Changed Date	Date the information for this site was last changed.
Expiry Date	Date the site expires.
Contact	Name of the person who should be contacted regarding this site.
Active	Indicates whether this site is currently in use within the Portal.
Base Station	IP Address of the base station for this site.

Configuring cashups for your site

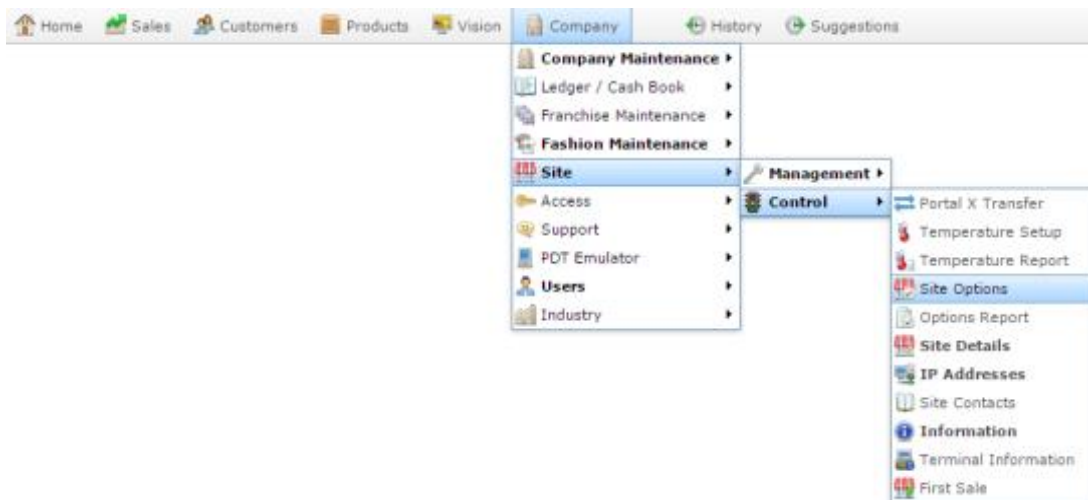
Use the Site Options - Cashup section to configure how cashups are performed by operators at your site.

Note: These configurations only affect POSPortal Point of Sale systems. iZen does not use these configurations.

Opening the Site Options - Cashup section

To open the Site Options - Cashup section:

1. Press  Company.
2. Press Site > Control > Site Options.



The Cashup section of the Site Options screen is displayed.

Options Maintenance

Site:

Configuration **Options**

Group:

Section:

Name	Value	Description
Banking Seperate	True	Set to Enable capturing Banking on its own
Blind Cashup Cash	True	Set to true for blind cashup Cash Tender
Blind Cashup Tender 10	False	Set to true for blind cashup tender # 10
Blind Cashup Tender 11	False	Set to true for blind cashup tender # 11
Blind Cashup Tender 12	False	Set to true for blind cashup tender # 12
Blind Cashup Tender 13	False	Set to true for blind cashup tender # 13
Blind Cashup Tender 14	False	Set to true for blind cashup tender # 14
Blind Cashup Tender 15	False	Set to true for blind cashup tender # 15
Blind Cashup Tender 16	False	Set to true for blind cashup tender # 16
Blind Cashup Tender 2	False	Set to true for blind cashup tender # 2
Blind Cashup Tender 3	False	Set to true for blind cashup tender # 3
Blind Cashup Tender 4	False	Set to true for blind cashup tender # 4
Blind Cashup Tender 5	False	Set to true for blind cashup tender # 5
Blind Cashup Tender 6	False	Set to true for blind cashup tender # 6
Blind Cashup Tender 7	False	Set to true for blind cashup tender # 7

Site Options - Cashup section key fields and buttons

Field	Description
Banking Separate	Type True if you want to allow banking only in the cash up screen.
Blind Cashup Cash	Type True if you want the cash cashup to be performed without the operator seeing what the terminal's cash total is.
Blind Cashup Tender 1 to 16	Type True if you want this tender cashup to be performed without the operator seeing what the terminal's tender total is.
Cashup Threshold	Type the amount a cashup can be out of balance in either direction before the cashup is rejected.
Enable Auto Advance	Type True to automatically load the advance for all applicable tenders the next trading day.
Enable Auto Advance Cash	Type True to automatically load the cash advance for the next trading day.
Enable Auto Advance Cheque	Type True to automatically load the advance for the next trading day.
Enable Cashup Banking	Type True to allow banking of cashup.

Field	Description
Enable Head Cashier	Type True to allow the back office to cash up the terminals.
Enable Operator Report	Type True provide a summary report of the cashup to the operator.
	<p>Note: This is the only way the operator can review the cashup after completing it.</p>
Enable RED Voucher Cashup	This field is no longer used.
Enable Scheduler Cashup	Type True if you want the Point of Sale to prevent cashing up if unpaid schedule items are still outstanding for the day.
Enable Table Service Cashup	Type True if you want the POSPortal Point of Sale to prevent cashing up if unpaid table service transactions are still outstanding for the day.
Force Banking	Type True if you want operators to add the amount that has been banked during their cashup.
Force Operator Report	Type True if you want the operator to have to complete a daily report when cashing up.

Field	Description
Show On Completion	Type True if you want the POSPortal Point of Sale to display the cashup figures after cashup has been completed.

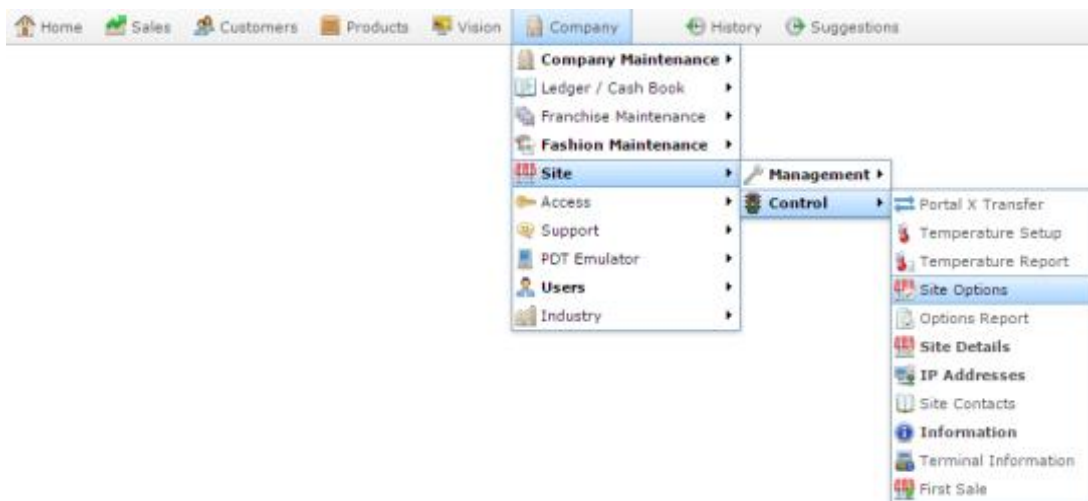
Configuring costs for your site

Use the Site Options - Costs section to configure how your site automatically manages item costs using stock receipts.

Opening the Site Options - Costs section

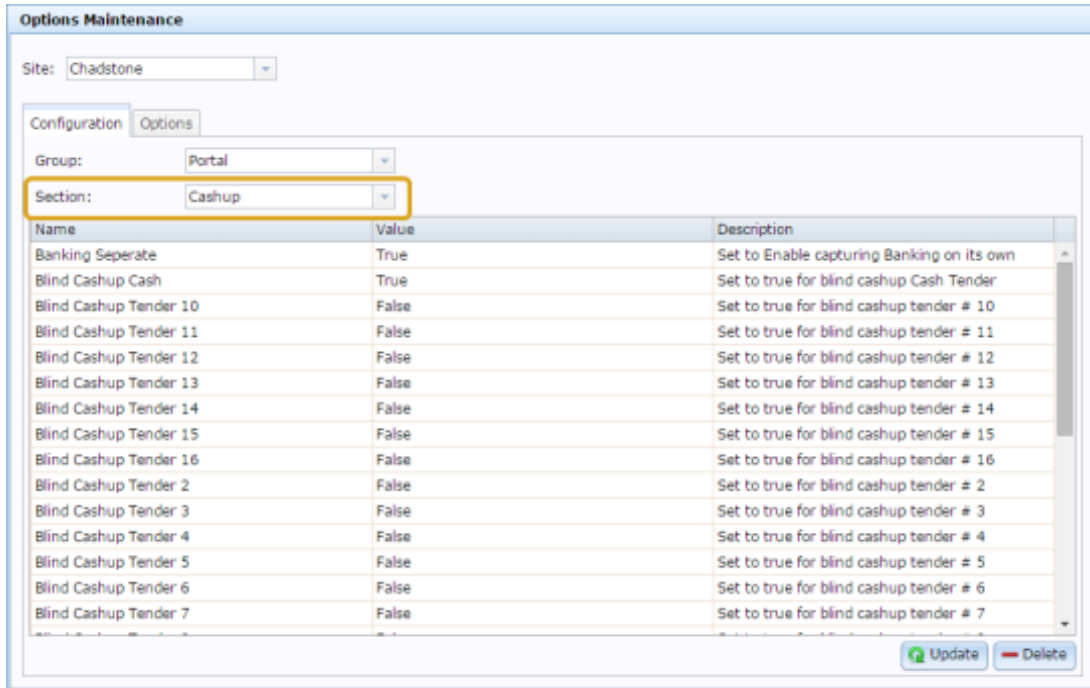
To open the Site Options - Costs section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



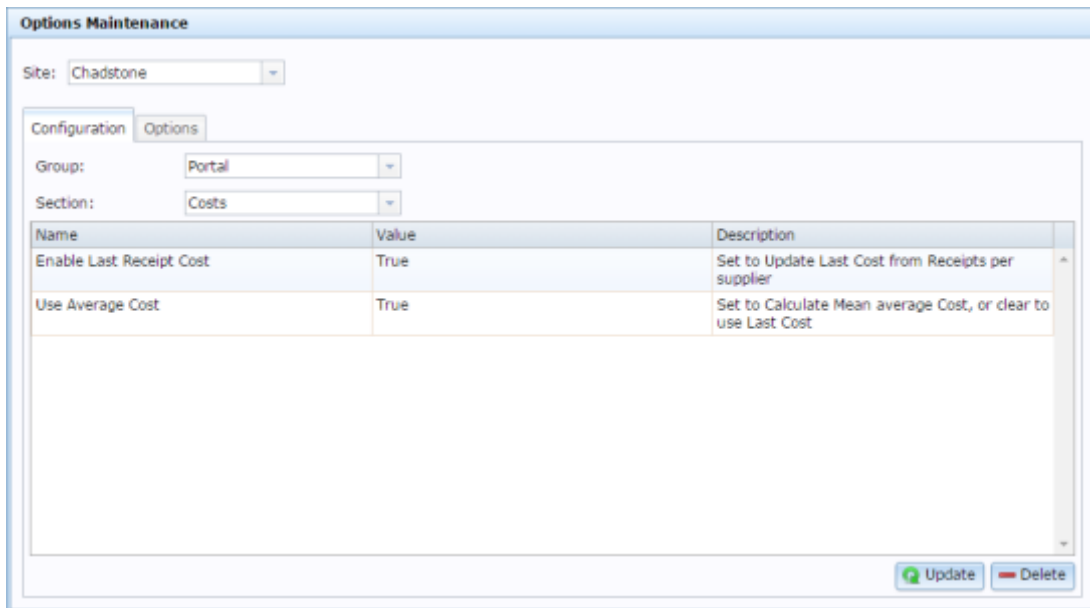
The Cashup section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

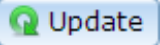


4. Select Costs from the Section drop-down list.

The Costs section is displayed.



Site Options - Costs section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Enable Last Receipt Cost	Type True to update item costs using the cost from the last receipt when finalised, or False to not automatically update costs.
Use Average Cost	<p>Type True to update the item cost by calculating the weighted average (mean) cost.</p> <div data-bbox="911 1189 1394 1541" style="border: 1px solid #4F81BD; padding: 5px;"> <p>Note: The weighted average is calculated as: [Existing Stock-on-Hand multiplied by the Old Cost] plus [Received Stock multiplied by the New Cost] divided by Total Stock (including the received stock).</p> </div> <p>Type False to use the last receipt cost. Costs are only updated after receipts have been finalised.</p>

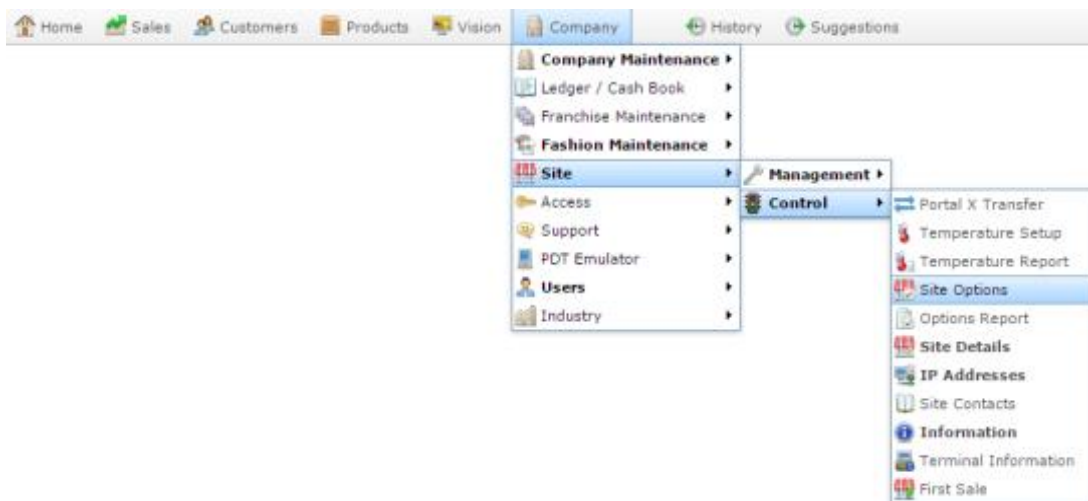
Configuring creditor contracts for your site

Use the Site Options - Creditor Contracts section to configure how your site manages creditor contracts.

Opening the Site Options - Creditor Contracts section

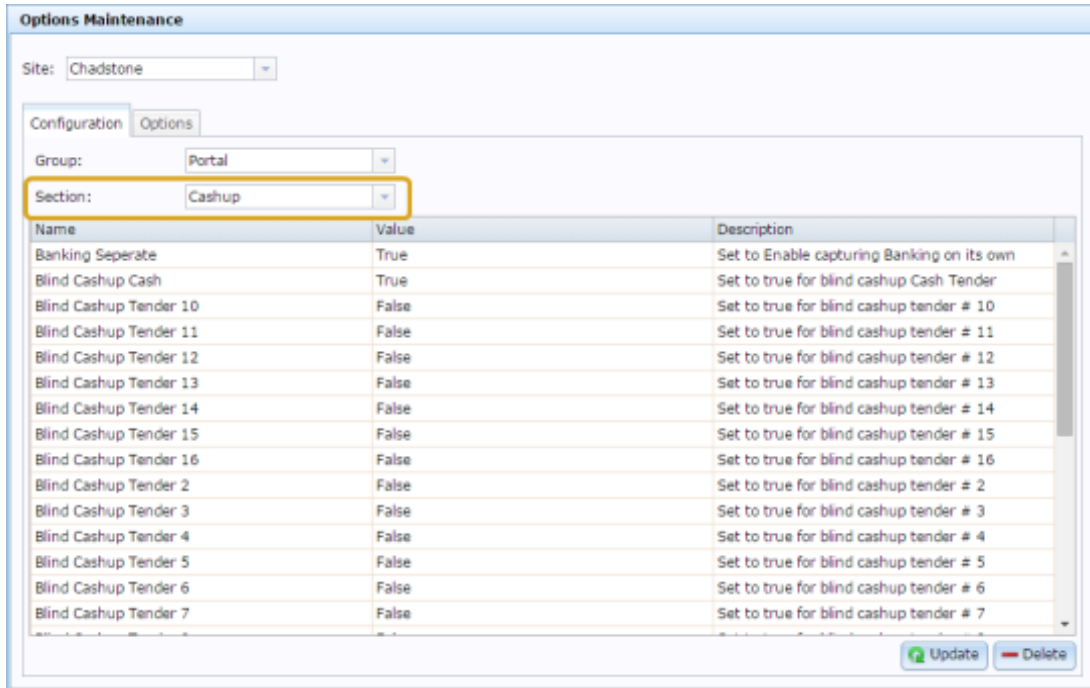
To open the Site Options - Creditor Contracts section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



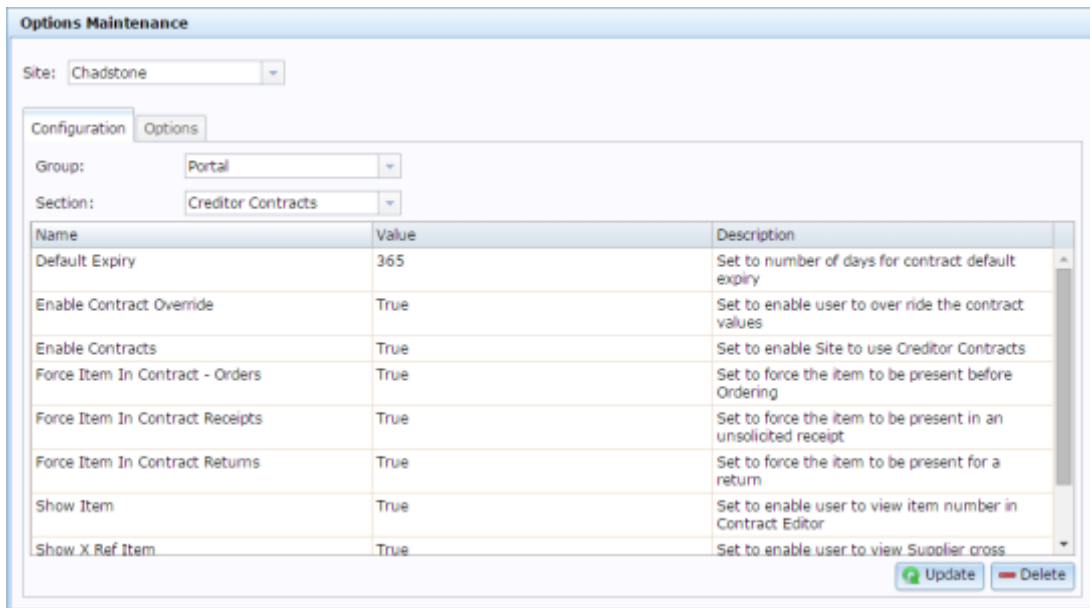
The Cashup section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

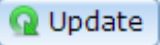


4. Select Creditor Contracts from the Section drop-down list.

The Creditor Contracts section is displayed.



Site Options - Creditor Contracts section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Default Expiry	Type the number of days before contracts should expire by default. For example, if you contracts usually last one year, type 365 .
Enable Contract Override	Type True to allow Portal users to override contract values.
Enable Contracts	Type True to enable creditor contracts for this site.
Force Item In Contract - Orders	Type True to only allow items to be ordered when a contract is in place for that item.
Force Item In Contract Receipts	Type True to only allow items to be received when a contract is in place for that item.
Force Item In Contract Returns	Type True to only allow items to be returned when a contract is in place for that item.

Configuration	Description
Show Item	Type True to display the item code in Contract Maintenance.
Show X Ref Item	Type True to display the supplier's code for the item in Contract Maintenance.
Update Cost of Contract in Receipts	Type True to update the price of the item in the creditor's contract when the item is received from that creditor.

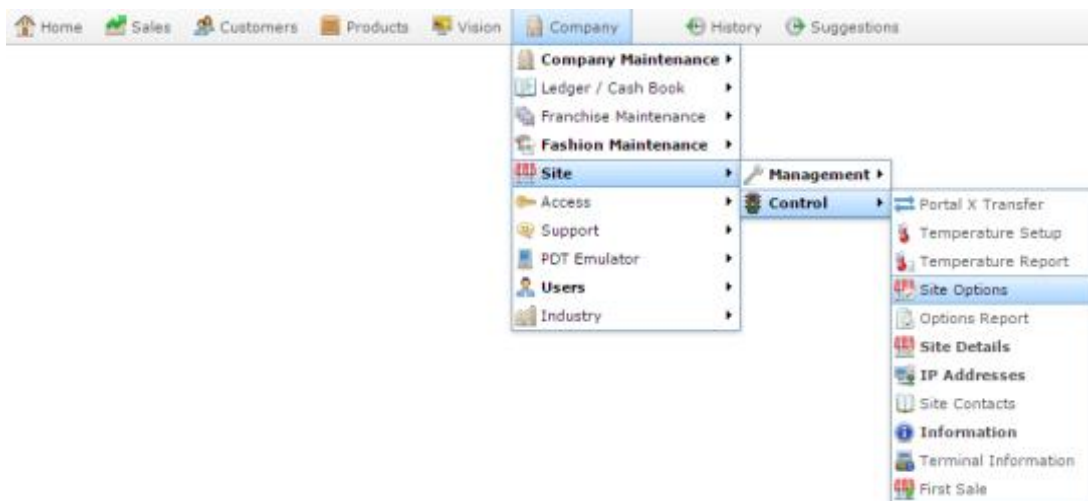
Configuring Customer Orders for your site

Use the Site Options - Customer Orders section to configure how your site manages customer orders.

Opening the Site Options - Customer Orders section

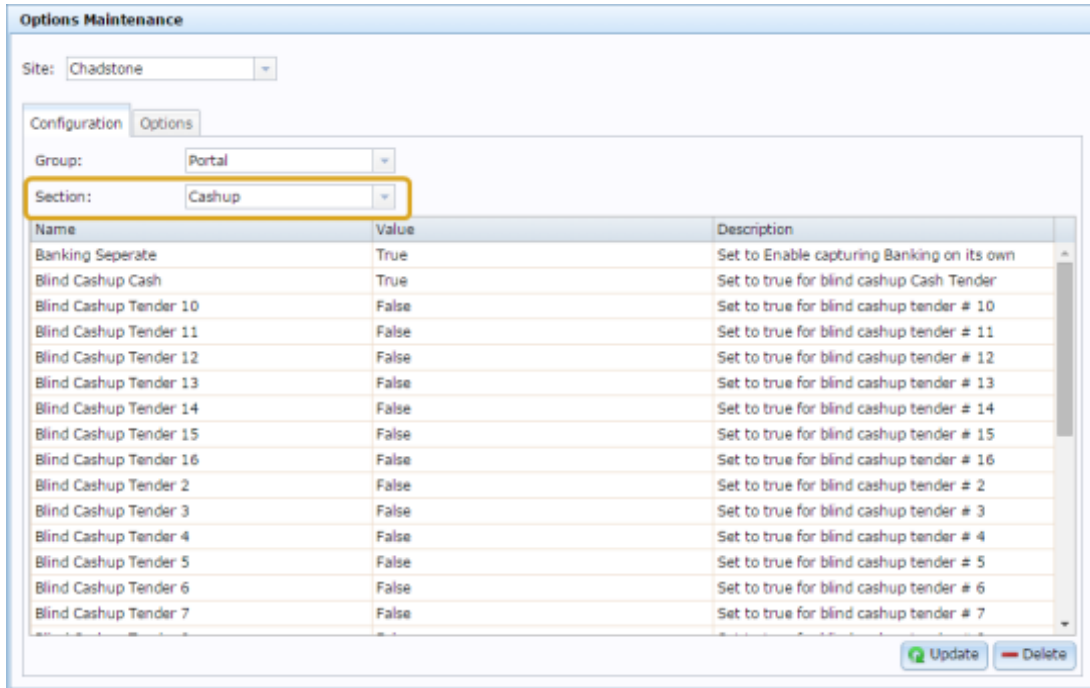
To open the Site Options - Customer Orders section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



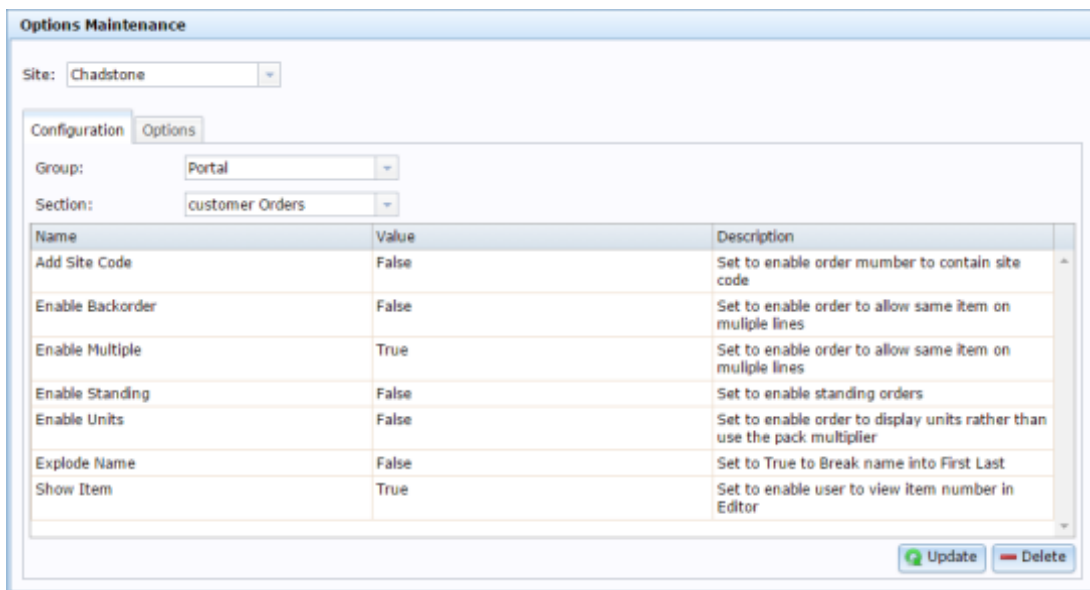
The Cashush section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

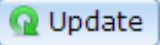


4. Select Customer Orders from the Section drop-down list.

The Customer Orders section is displayed.



Site Options - Customer Orders section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Add Site Code	Type True to include the site code in each customer order number.
Enable Backorder	Type True to automatically create backorders from items that are not filled in customer orders.
Enable Multiple	Type True to allow customers to order the same item on more than one order line.
Enable Standing	Type True to allow standing orders.
Enable Units	Type True to allow orders of individual units, rather than orders of packs. For example, if an item has 5 units to a pack, and Enable Units is set to True , typing 15 orders 3 packs, or 15 units. If Enable Units is False , typing 15 orders 15 packs, or 45 units.

Configuration	Description
Explode Name	Type True to break the customer's name into first and last names.
Show Item	Type True to show the item number in the order editor.

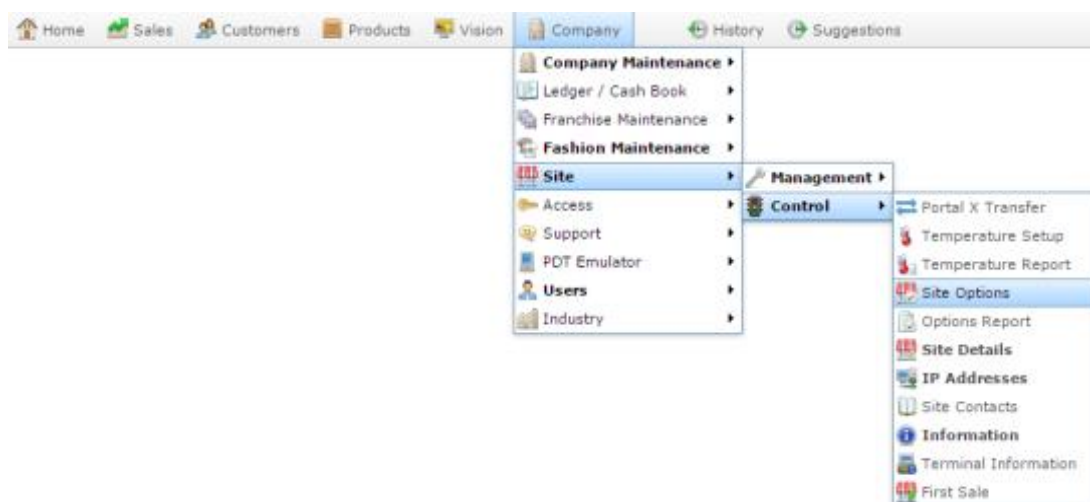
Configuring debtor contracts for your site

Use the Site Options - Debtor Contracts section to configure how your site manages debtor contracts.

Opening the Site Options - Debtor Contracts section

To open the Site Options - Debtor Contracts section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



The Cashup section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

Options Maintenance

Site: Chadstone

Configuration Options

Group: Portal

Section: Cashup

Name	Value	Description
Banking Seperate	True	Set to Enable capturing Banking on its own
Blind Cashup Cash	True	Set to true for blind cashup Cash Tender
Blind Cashup Tender 10	False	Set to true for blind cashup tender # 10
Blind Cashup Tender 11	False	Set to true for blind cashup tender # 11
Blind Cashup Tender 12	False	Set to true for blind cashup tender # 12
Blind Cashup Tender 13	False	Set to true for blind cashup tender # 13
Blind Cashup Tender 14	False	Set to true for blind cashup tender # 14
Blind Cashup Tender 15	False	Set to true for blind cashup tender # 15
Blind Cashup Tender 16	False	Set to true for blind cashup tender # 16
Blind Cashup Tender 2	False	Set to true for blind cashup tender # 2
Blind Cashup Tender 3	False	Set to true for blind cashup tender # 3
Blind Cashup Tender 4	False	Set to true for blind cashup tender # 4
Blind Cashup Tender 5	False	Set to true for blind cashup tender # 5
Blind Cashup Tender 6	False	Set to true for blind cashup tender # 6
Blind Cashup Tender 7	False	Set to true for blind cashup tender # 7

Update Delete

4. Select Debtor Contracts from the Section drop-down list.

The Debtor Contracts section is displayed.

Options Maintenance

Site: AMC

Configuration Options

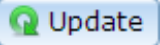
Group: Portal

Section: Debtor Contracts

Name	Value	Description
Default Expiry	365	Set to number of days for contract default expiry
Enable Contract Override	True	Set to enable user to over ride the contract values
Enable Contracts	True	Set to enable Site to use Debtor Contracts
Force Contract In Invoicing	False	Set to force the item to be present in contracts for Invoicing
Show Item	True	Set to enable user to view item number in Contract Editor
Update Cost of Contract in Invoicing	False	Set to update Debtor Contracts Cost price on finalisation of Invoice

Update Delete

Site Options - Debtor Contracts section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Default Expiry	Type the number of days before contracts should expire by default. For example, if you contracts usually last one year, type 365 .
Enable Contract Override	Type True to allow Portal users to override contract values.
Enable Contracts	Type True to enable debtor contracts for this site.
Force Contract In Invoicing	Type True to only allow items to be added to an invoice when a contract is in place for that item.
Show Item	Type True to display the item code in Contract Maintenance.
Update Cost of Contract in Invoicing	Type True to update the price of the item in the debtor's contract when the invoice is created.

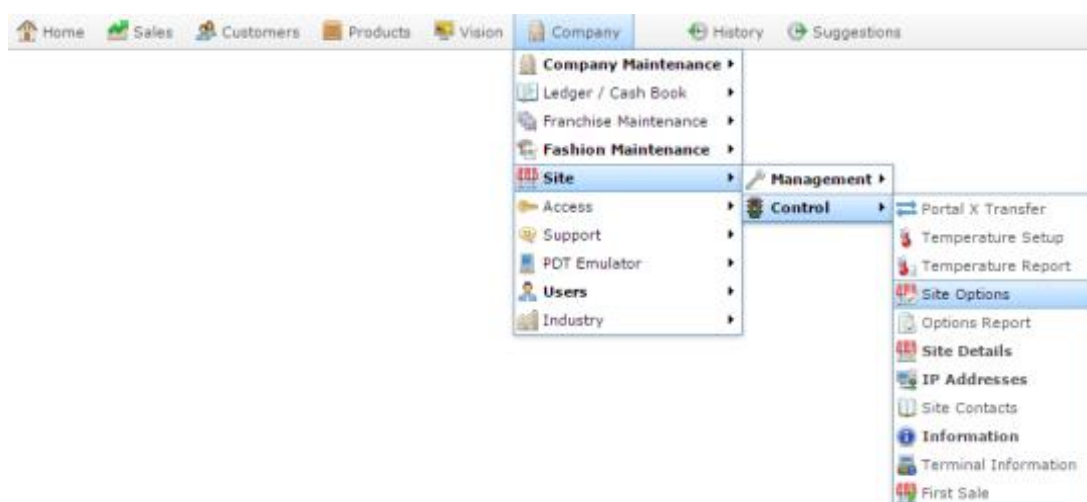
Configuring debtors for your site

Use the Site Options - Debtor Contracts section to configure your site for debtor contracts.

Opening the Site Options - Debtor Contracts section

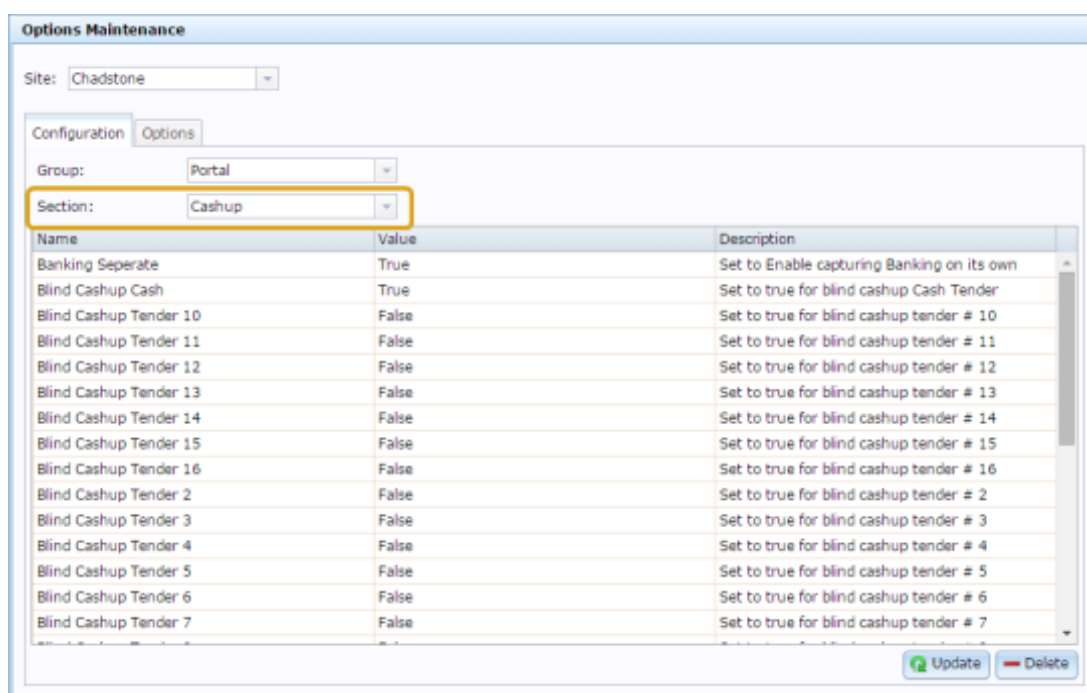
To open the Site Options - Debtor Contracts section:

1. Press  Company.
2. Press Site > Control > Site Options.



The Cashup section of the Site Options screen is displayed.

3. Open the Section drop-down list.



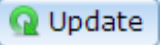
4. Press **Debtors** from the **Section** drop-down list.

The Debtors section is displayed.

The screenshot shows the 'Options Maintenance' window for site 'AMC'. It has two tabs: 'Configuration' and 'Options'. Under 'Configuration', the 'Group' is set to 'Portal' and the 'Section' is set to 'Debtors'. Below this is a table with three columns: 'Name', 'Value', and 'Description'. The table contains three rows of options. At the bottom right of the window are 'Update' and 'Delete' buttons.

Name	Value	Description
Enable Display Currency	False	Set to enable the statement to have currency symbols within statement
Enable Item Number	False	Set to enable the statement to show item numbers
Site Bank Details		Set Statement Bank details for site

Site Options - Debtors section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Field	Description
Enable Display Currency	Type True to display the currency symbols on statements.
Enable Item Number	Type True to display item numbers on statements.
Site Bank Details	Type the bank details for this site.

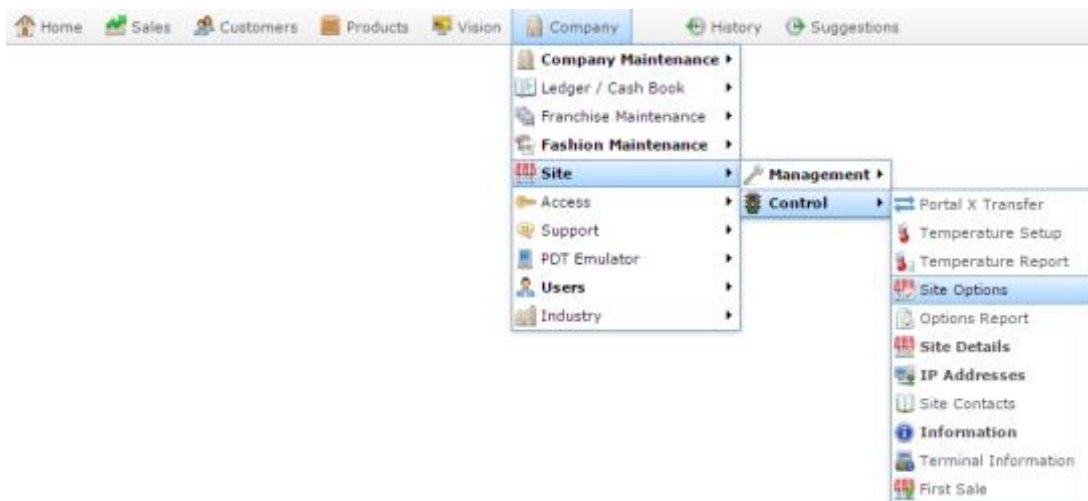
Configuring departments for your site

Use the Site Options - Department section to configure your site to control how departments are displayed.

Opening the Site Options - Department section

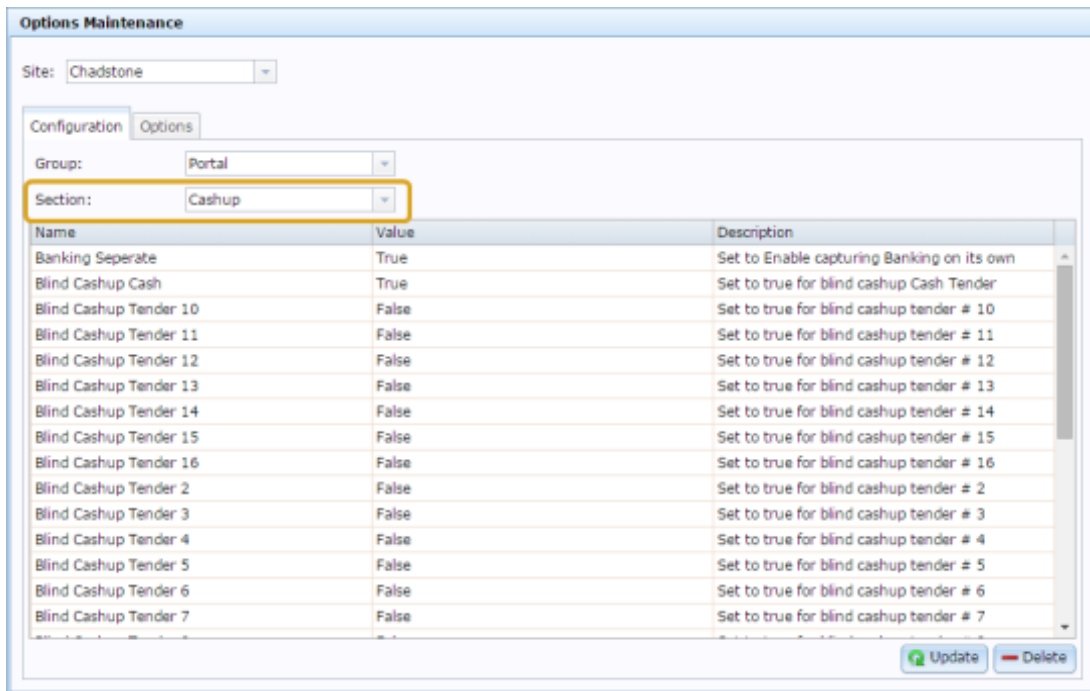
To open the Site Options - Department section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



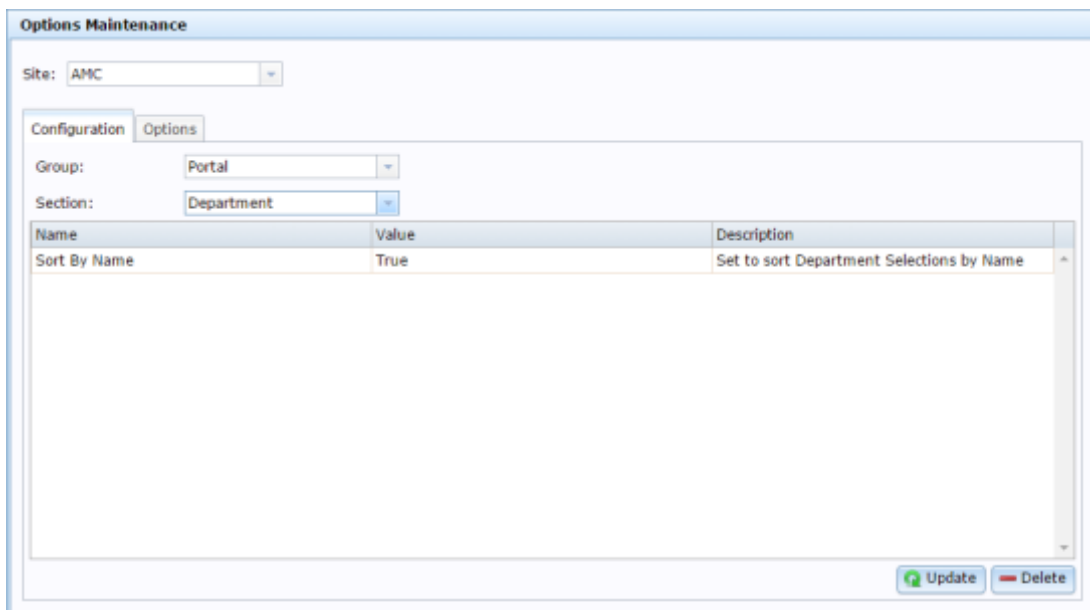
The Cashush section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.



4. Press Department from the Section drop-down list.

The Department section is displayed.



Site Options - Department section key fields and buttons

Field	Description
Sort By Name	Type True to display departments sorted alphabetically by department name on this site. Type False to sort departments by their department number.

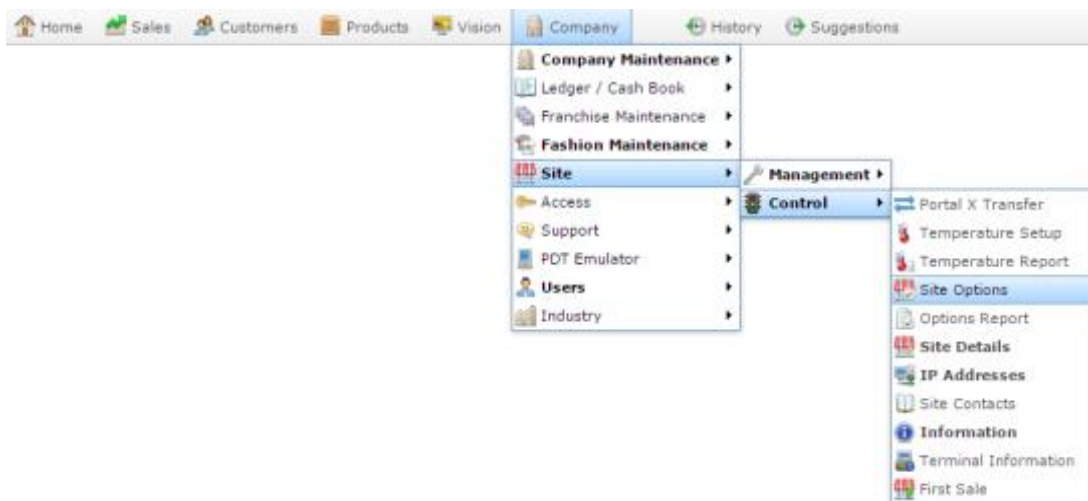
Configuring home delivery for your site

Use the Site Options - Home Delivery section to configure the fees and charges for your home delivery service at this site.

Opening the Site Options - Home Delivery section

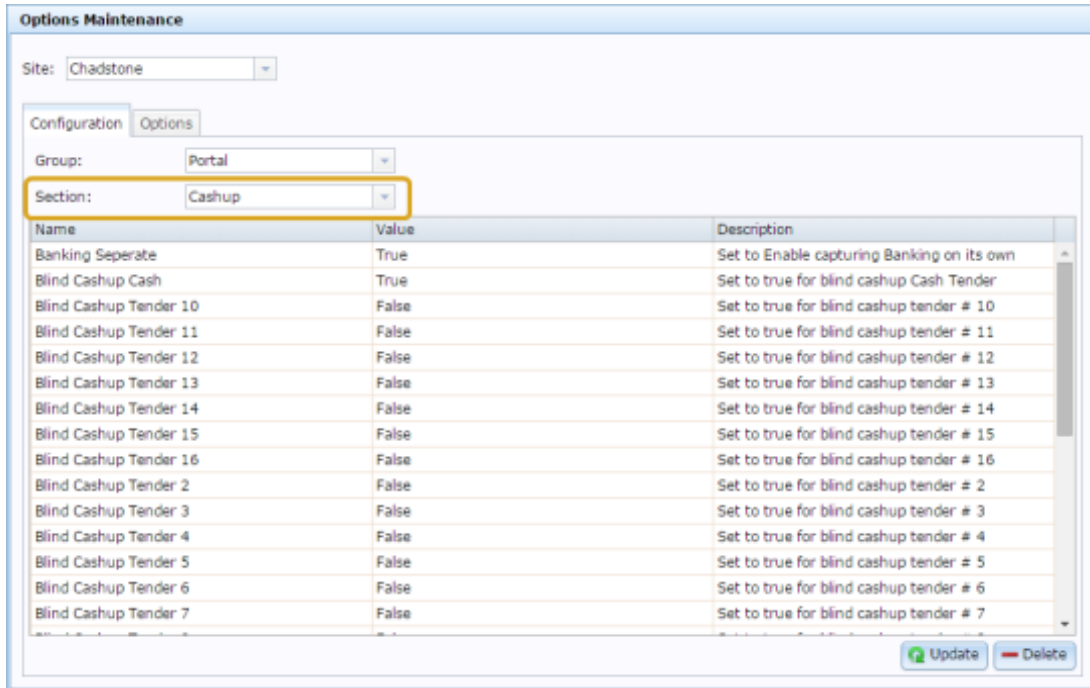
To open the Site Options - Home Delivery section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



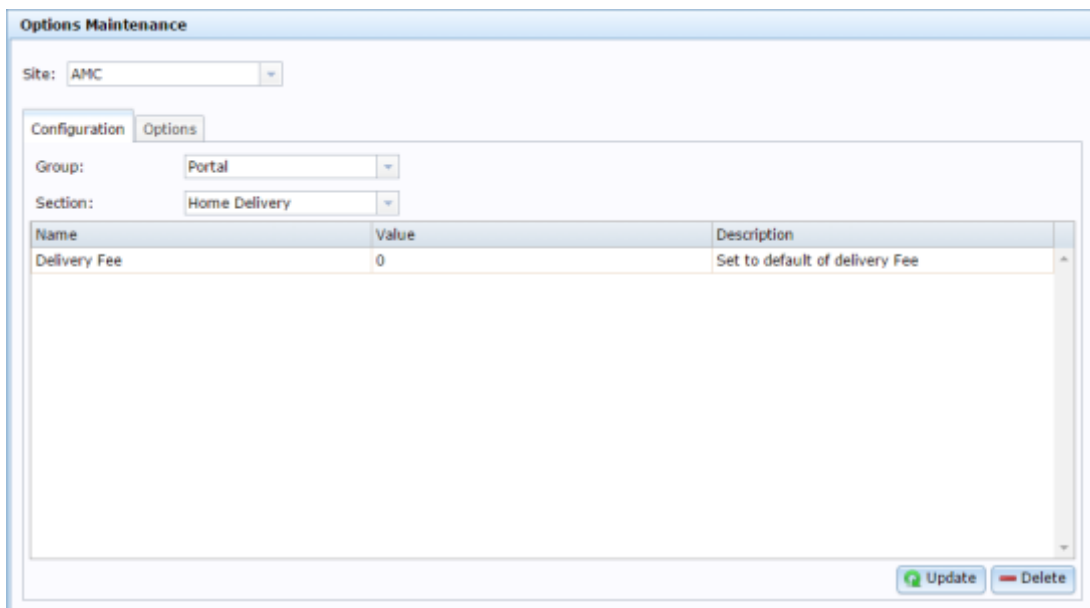
The Cashush section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.



4. Press Home Delivery from the Section drop-down list.

The Home Delivery section is displayed.



Site Options - Home Delivery section key fields and buttons


Field	Description
Delivery Fee	Type the dollar amount charged per delivery.

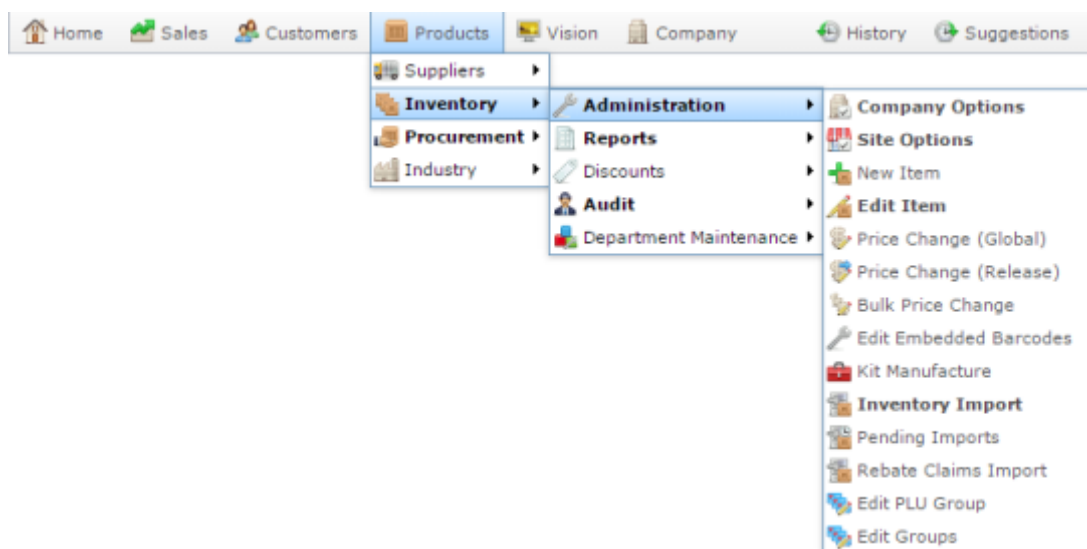
Configuring inventory options for your site

Use the Site options - Inventory screen to configure how items are managed on a site-by-site basis. These settings only affect the selected site.

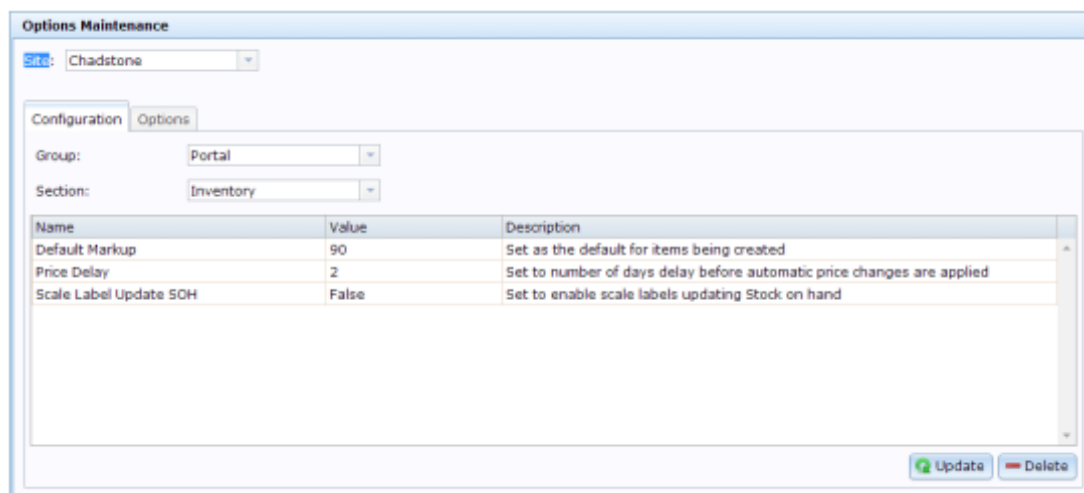
Opening the Site options - Inventory screen

To open the Site options - Inventory screen:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Site Options**.



The Site options - Inventory screen is displayed.

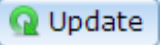


The screenshot shows the 'Options Maintenance' screen for the 'Chadstone' site. The 'Configuration' tab is active, and the 'Options' sub-tab is selected. The 'Group' is set to 'Portal' and the 'Section' is set to 'Inventory'. A table displays the following options:

Name	Value	Description
Default Markup	90	Set as the default for items being created
Price Delay	2	Set to number of days delay before automatic price changes are applied
Scale Label Update SOH	False	Set to enable scale labels updating Stock on hand

At the bottom right of the screen, there are 'Update' and 'Delete' buttons.

Site options - Inventory screen key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Default Markup	Type the default percentage markup to be used when items are created.
Price Delay	Type the number of days before Portal price changes are applied to the Point of Sale.
Scale Label Update SOH	Type True to update the stock-on-hand when creating scale labels.

Configuring labels for your site

Use the Site Options - Labels section to configure how the Portal manages labels printed via the Label Maintenance screen, including:

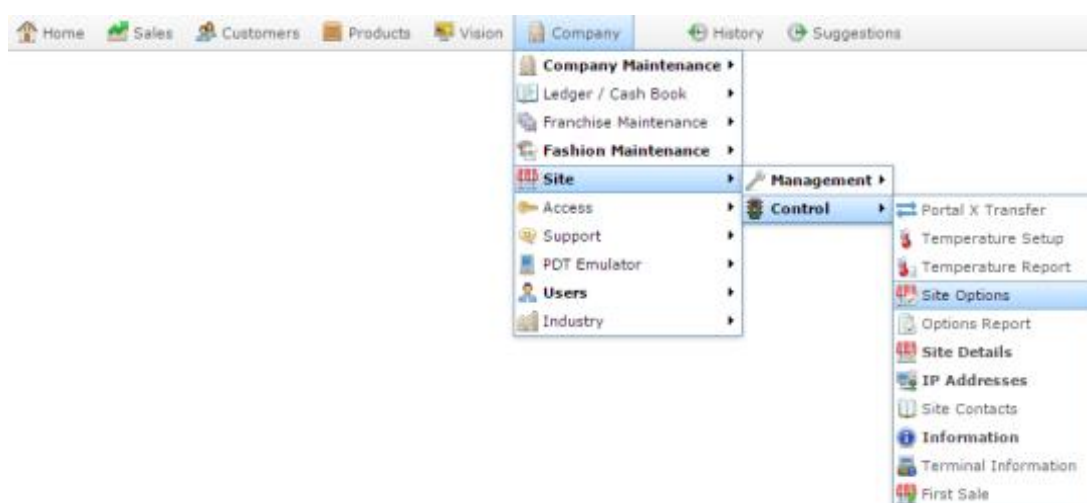
- The number of days the Portal looks into the future for pending price changes.
- The number of days the Portal looks into the past for price changes.
- The filenames to use for downloadable item database files.

See *Printing labels*.

Opening the Site Options - Labels section

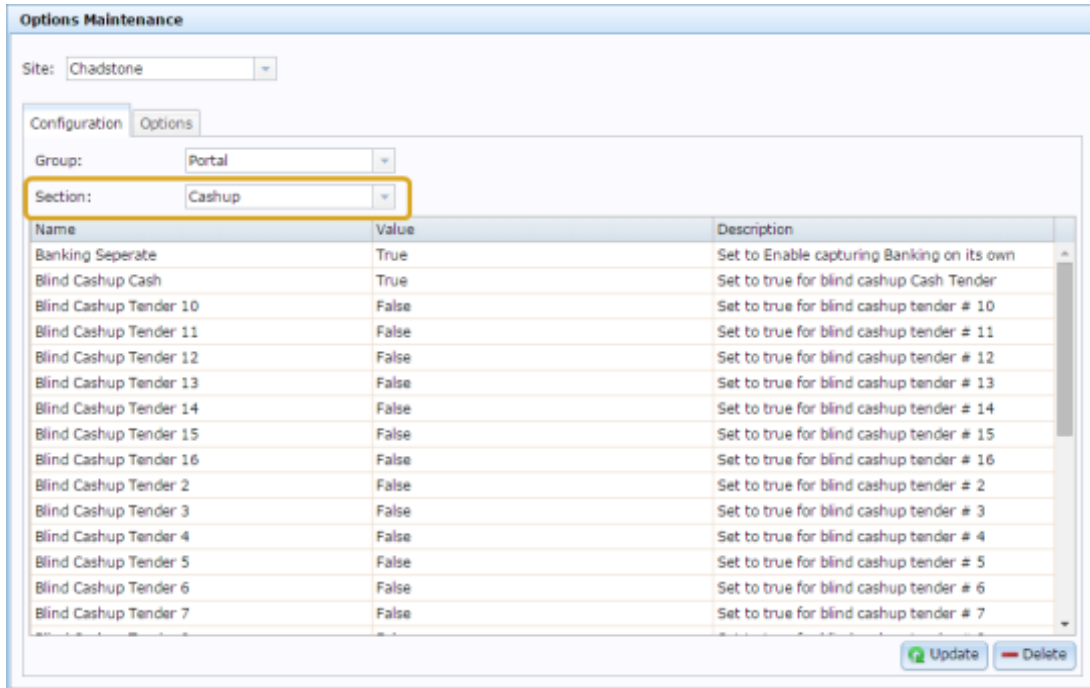
To open the Site Options - Labels section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



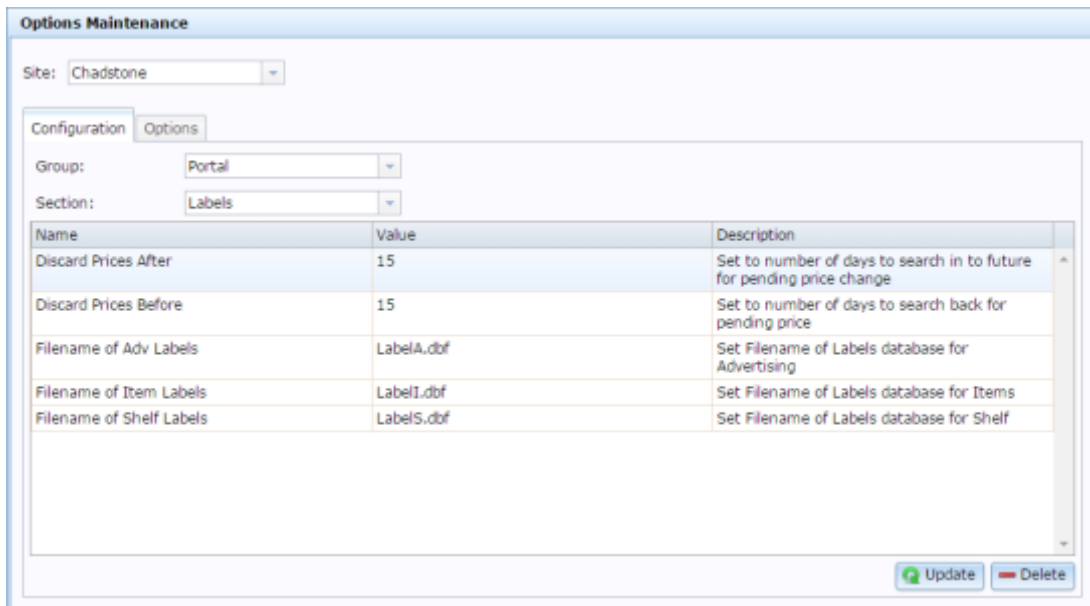
The Cashup section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

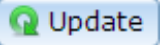


4. Select Labels from the Section drop-down list.

The Labels section is displayed.



Site Options - Labels section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Discard Prices After	<p>Type the number of days ahead the Portal should scan for global price changes when adding items to the label list.</p> <p>For example, if you want the Portal to add all items that change price in the next two weeks, type 14.</p>
Discard Prices Before	<p>Type the number of days into the past the Portal should scan for global price changes when adding items to the label list.</p> <p>For example, if you want the Portal to add all items that have changed price in the last week, type 7.</p>
Filename of Adv Labels	Type the filename of the database file for advertising labels. For example, LabelA.dbf .
Filename of Item Labels	Type the filename of the database file for individual item labels. For example, LabelI.dbf .

Configuration	Description
Filename of Shelf Labels	Type the filename of the database file for shelf labels. For example, LabelS.dbf .

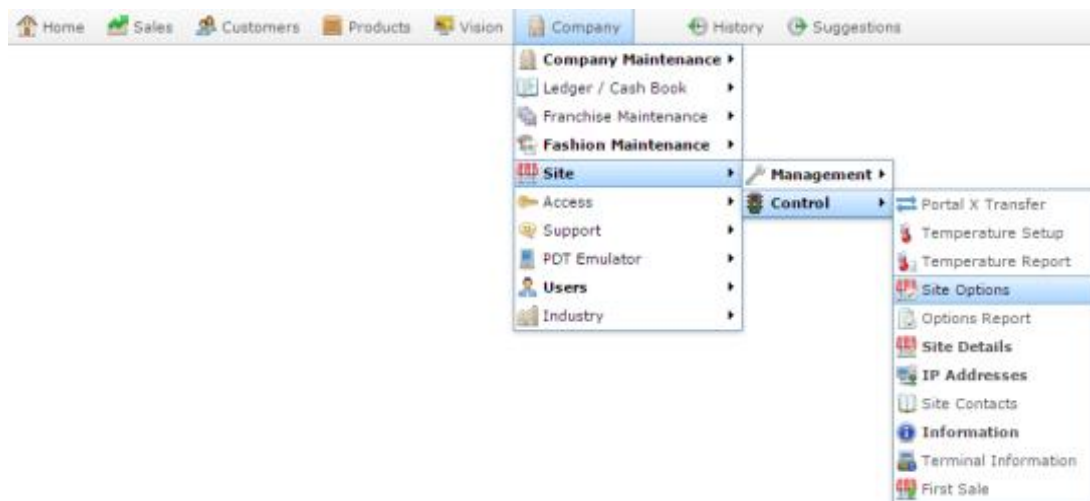
Configuring your site for loyalty

Use the Site Options - Loyalty section to configure your site for customer loyalty rewards systems.

Opening the Site Options - Loyalty section

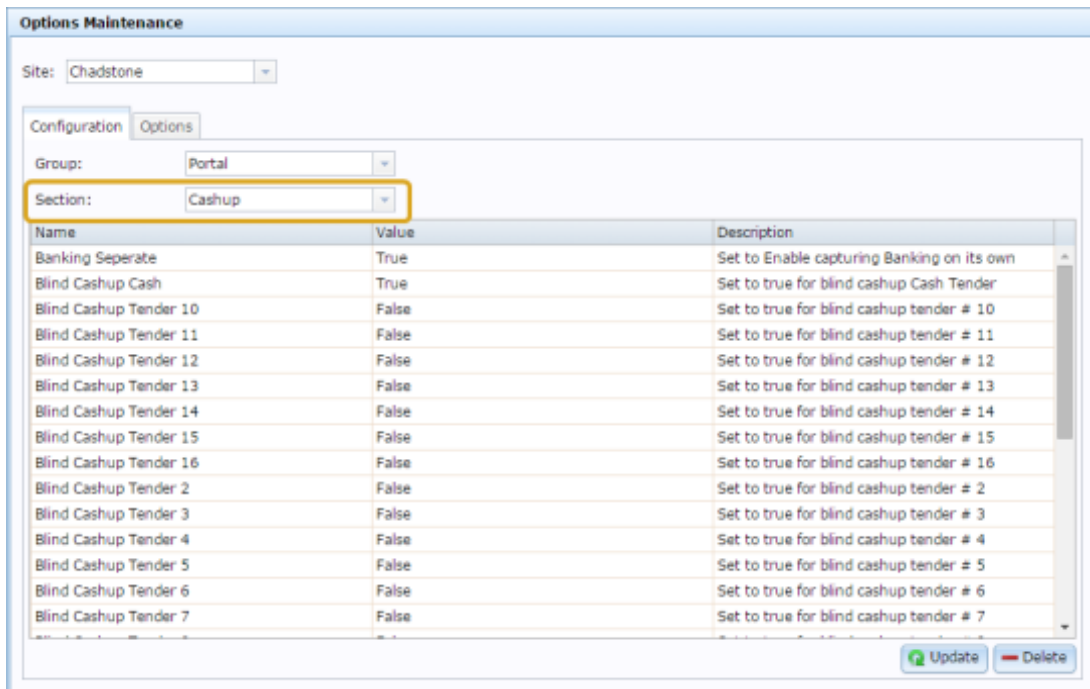
To open the Site Options - Loyalty section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



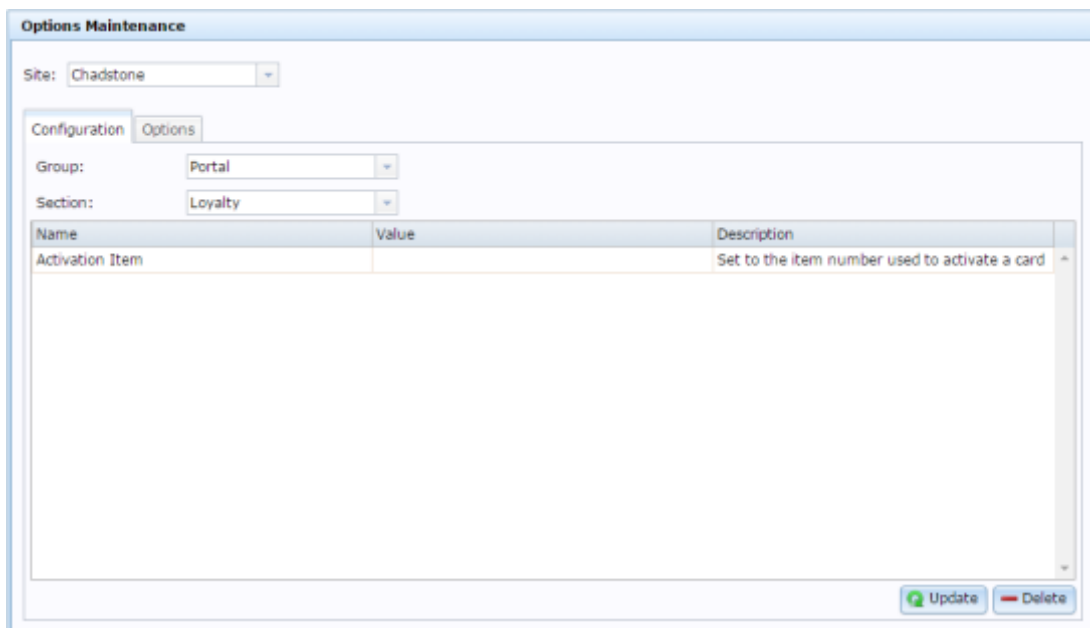
The Cashush section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

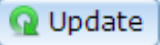


4. Press Loyalty from the Section drop-down list.

The Loyalty section is displayed.



Site Options -Loyalty section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Field	Description
Activation Item	Type the item code used to activate a loyalty card through the Point of Sale.

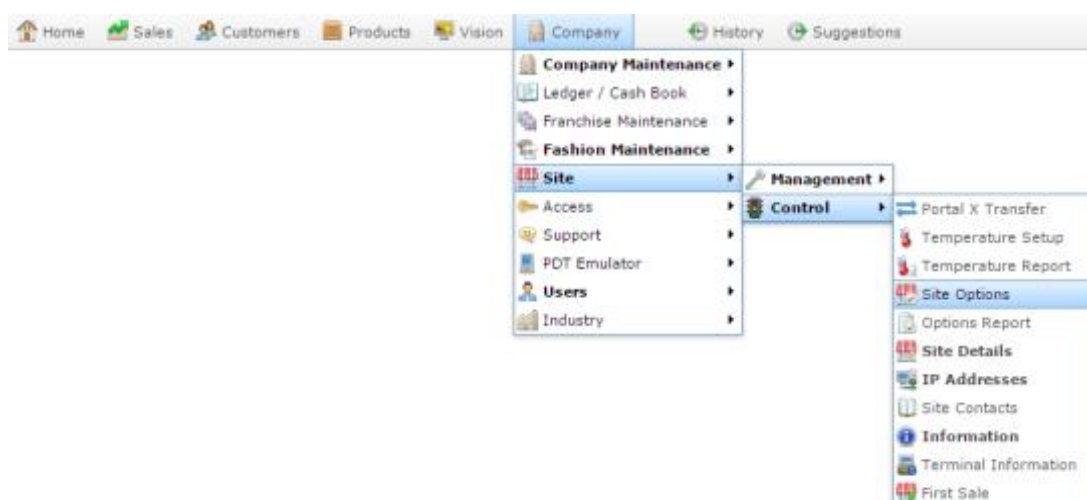
Configuring Metcash for your site

Use the Site Options - Metcash section to configure your site to use Metcash distributors.

Opening the Site Options - Metcash section

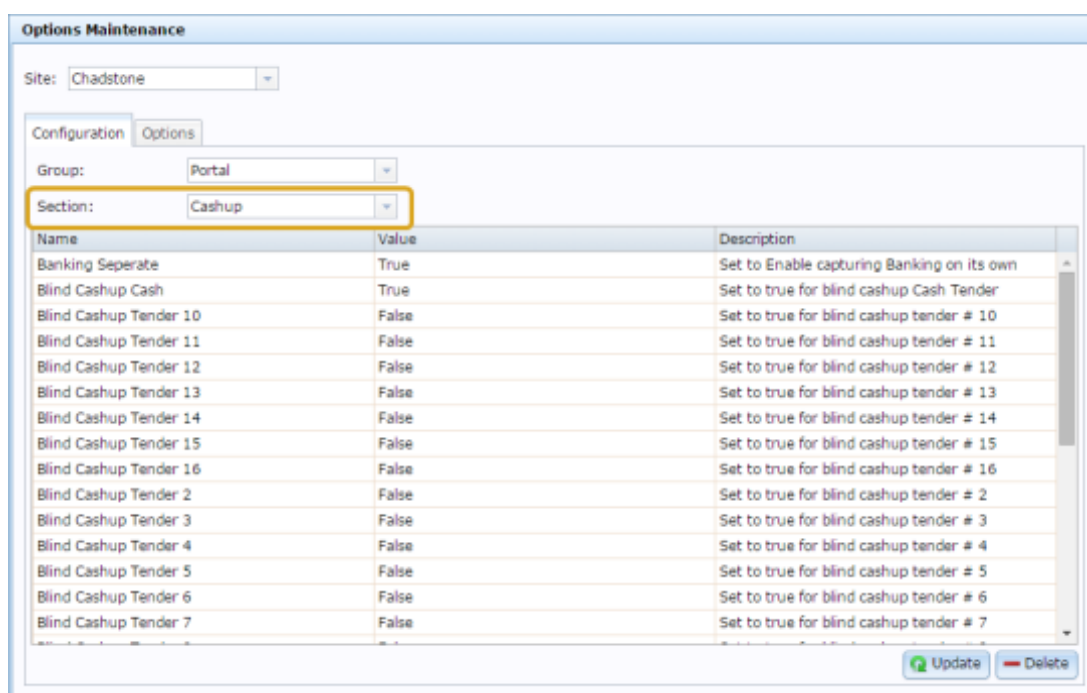
To open the Site Options - Metcash section:

1. Press  Company.
2. Press Site > Control > Site Options.



The Cashup section of the Site Options screen is displayed.

3. Open the Section drop-down list.



4. Select **Metcash** from the **Section** drop-down list.

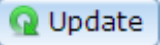
The Metcash section is displayed.

The screenshot shows the 'Options Maintenance' interface. At the top, the 'Site' is set to 'Chadstone'. Below this, there are two tabs: 'Configuration' and 'Options', with 'Options' being the active tab. Under the 'Options' tab, there are two dropdown menus: 'Group' set to 'Portal' and 'Section' set to 'Metcash'. Below these are two rows in a table:

Name	Value	Description
Auto Insert	False	set site to automatidly insert new items
Location	500	Set the Metcash Location for the Site

At the bottom right of the interface, there are two buttons: 'Update' (with a refresh icon) and 'Delete' (with a red minus icon).

Site Options - Metcash section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Auto Insert	Type True to automatically insert new Metcash items from import into the inventory.
Location	Type the Metcash location code that identifies this site, if your Portal configuration uses locations.

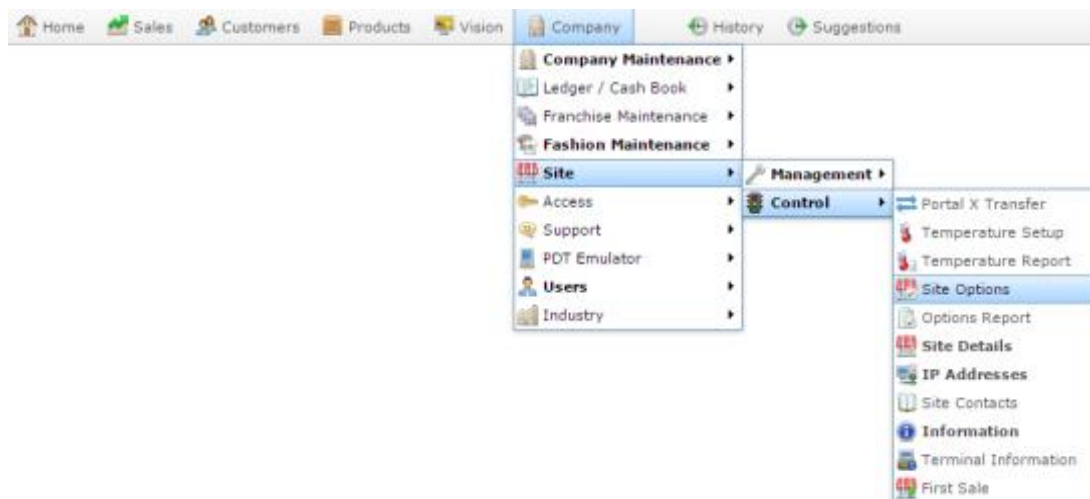
Configuring micro loans for your site

Use the Site Options - Micro Loan section to configure your site for micro loans.

Opening the Site Options - Micro Loan section

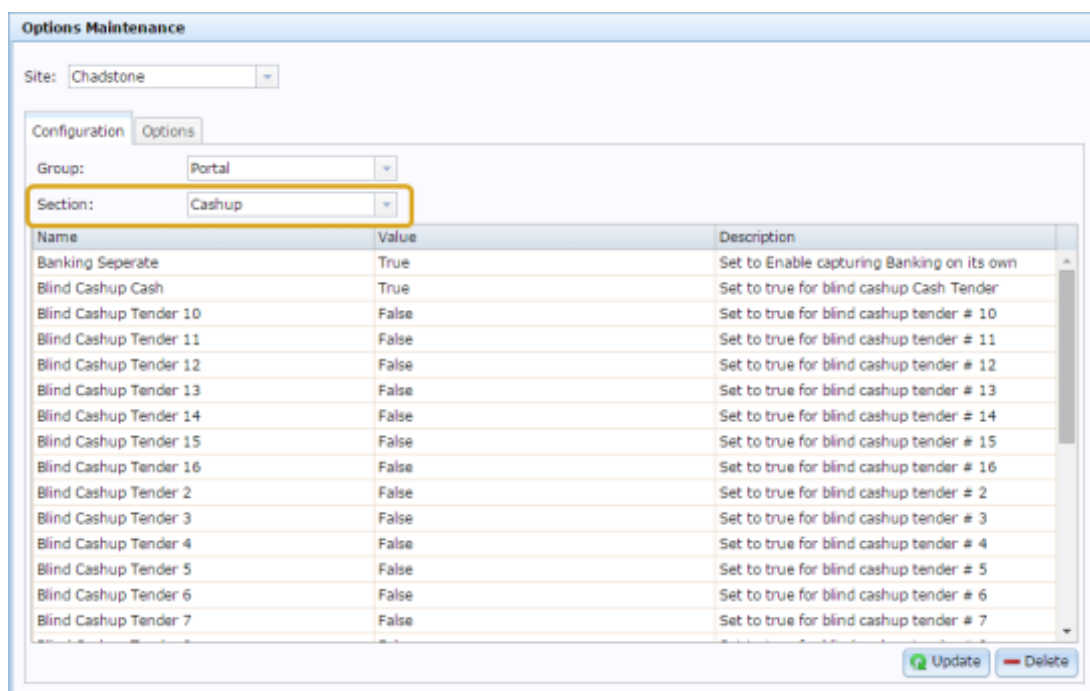
To open the Site Options - Micro Loan section:

1. Press  Company.
2. Press Site > Control > Site Options.



The Cashup section of the Site Options screen is displayed.

3. Open the Section drop-down list.



4. Select **Micro Loan** from the **Section** drop-down list.

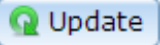
The Micro Loan section is displayed.

The screenshot shows the 'Options Maintenance' window for the 'Chadstone' site. The 'Options' tab is active, and the 'Section' is set to 'Micro Loan'. The configuration table is as follows:

Name	Value	Description
Extend On Payment	True	Set to True to extend loan on payment
Interest Period	0	Set to default period of interest rate, 0 = Month, 1 = Year
Interest Rate	5	Set to Current Interest Rate
Late Fee	0	Set to Current Late Fee

At the bottom right of the window, there are 'Update' and 'Delete' buttons.

Site Options - Micro Loan section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Extend on Payment	Type True to automatically extend the loan after a payment has been made.
Interest Period	Type the default period of interest: <ul style="list-style-type: none">▪ 0 for monthly interest.▪ 1 for yearly interest.
Interest Rate	Type the current interest rate. For example, if the interest is 5%, type 5.
Late Fee	Type the late fee dollar amount.

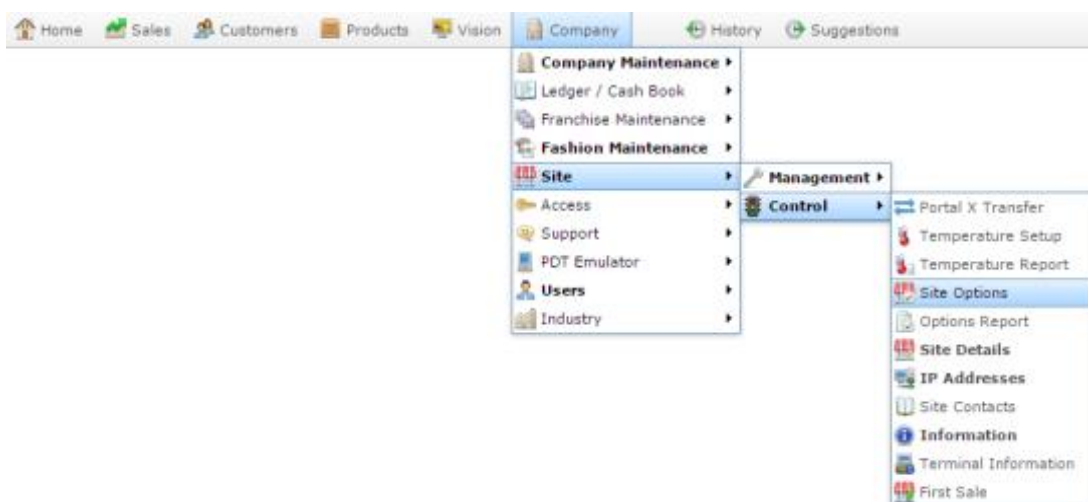
Configuring calendar options for your site

Use the Options tab of Site Options to configure how the site displays the days and months in a year.

Opening the Site Options - Options tab

To open the Site Options - Options tab:

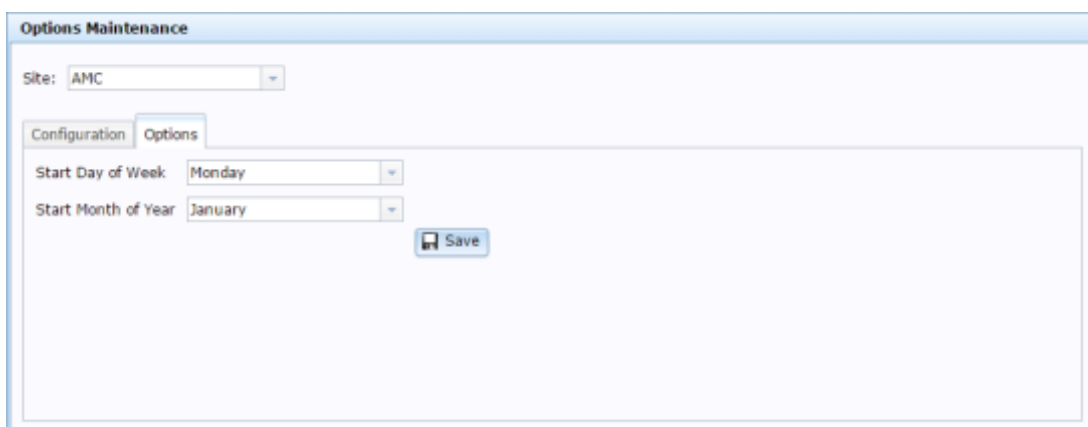
1. Press  Company.
2. Press Site > Control > Site Options.



The Cashup section of the Site Options screen is displayed.

3. Press the Options tab.

The Options tab of Site Options is displayed.



Site Options - Options tab key fields and buttons

Field	Description
Start Day of Week	Select the day that starts the week in your location.
Start Month of Year	Select the month that begins the year in your location.

Configuring packs for your site

Use the Site Options - Packs section to configure your site to use pack ordering, so that you order and receive packs of stock instead of individual units.

Note: This is different to automatically expanding partial-pack orders to full packs. This configuration automatically multiplies all ordered units by the pack size. For example, if the pack size is 5, and you add a quantity of 3 in a purchase order, the Portal automatically converts the order to 15 units.

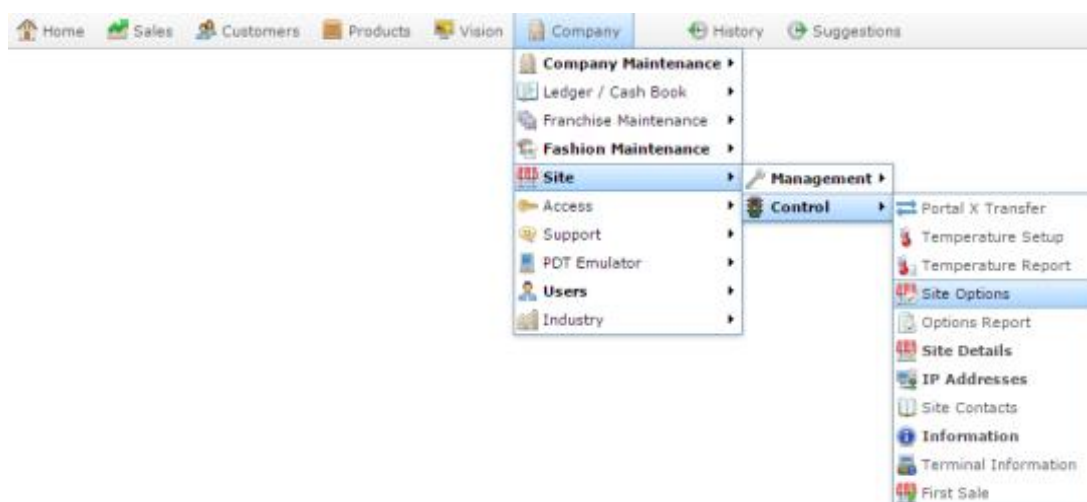
Tip: If you're looking for the configuration to expand partial-pack orders to full packs, see the **Packs** field in *Configuring purchase orders for your company*.

Note: You can use pack ordering alongside individual ordering by configuring the number of units in an item's pack on the Details tab of Item Maintenance. If an item has a pack quantity of 1, then pack ordering has no effect on your ordering. See *Inventory Management - Details tab*.

Opening the Site Options - Packs section

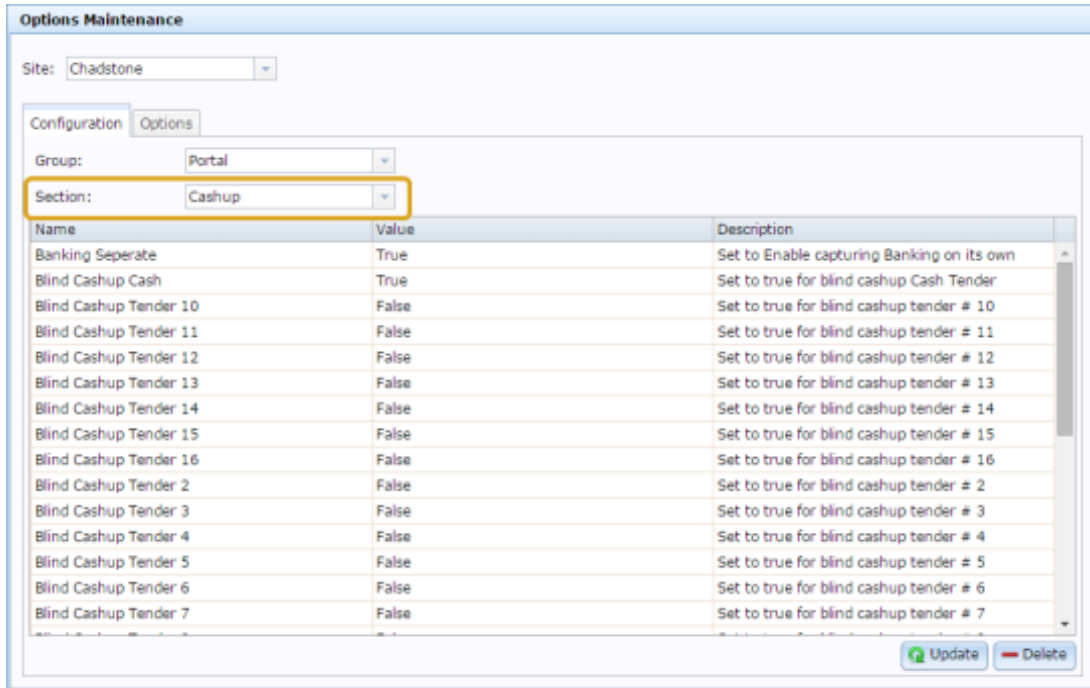
To open the Site Options - Packs section:

1. Press  Company.
2. Press Site > Control > Site Options.



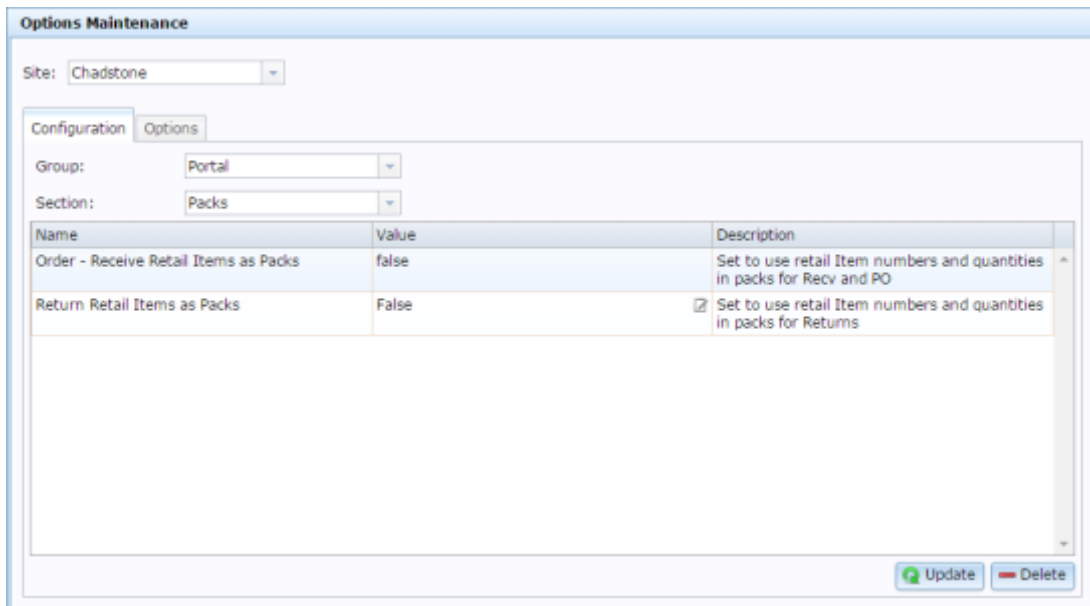
The Cashup section of the Site Options screen is displayed.

3. Open the Section drop-down list.

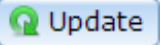


4. Select Packs from the Section drop-down list.

The Packs section is displayed.



Site Options - Packs section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration

Description

Order - Receive Retail Items as Packs

Type **True** to use pack ordering in receipting and purchase orders, so that you order the number of packs instead of individual units.

For example, if an item contains 4 to a pack, and you order 4, the Portal automatically expands this order to 16 individual items, or 4 packs.

Return Retail Items as Packs

Type **True** to use pack ordering in returns, so that you return the number of packs instead of individual units. For example, if an item contains 4 to a pack, and you return 1, the Portal automatically expands this return to 4 individual items, or 1 pack.

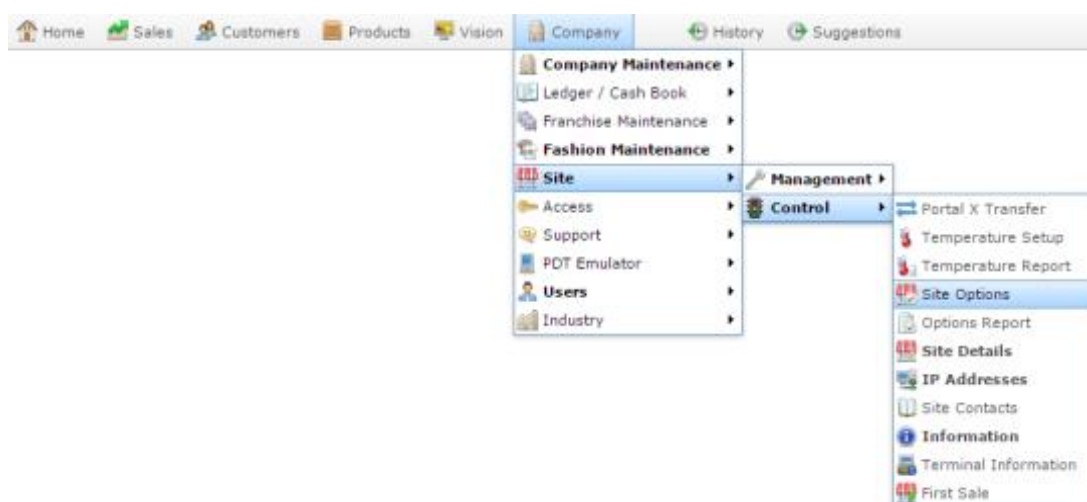
Configuring PDT sales for your site

Use the Site Options - PDT Sales section to configure how PDT logins work for your site.

Opening the Site Options - PDT Sales section

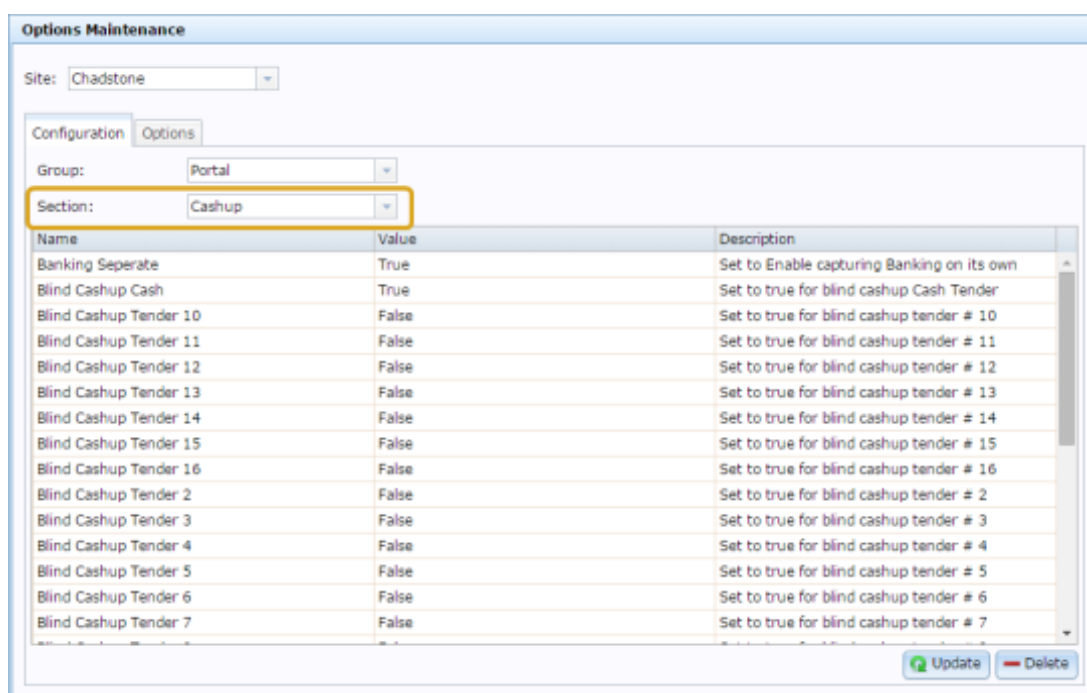
To open the Site Options - PDT Sales section:

1. Press  Company.
2. Press Site > Control > Site Options.



The Cashup section of the Site Options screen is displayed.

3. Open the Section drop-down list.



4. Select **PDT Sales** from the **Section** drop-down list.

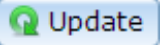
The PDT Sales section is displayed.

The screenshot shows the 'Options Maintenance' window for the 'Chadstone' site. The 'Options' tab is active, and the 'Section' is set to 'PDT Sales'. The configuration table below shows the following options:

Name	Value	Description
Auto Logout	False	Set to True to automatidly log out a PDT user on end of sale
Login Check	True	<input checked="" type="checkbox"/> Set to false to use only the base PDT login for PDT sales
Login Timeout	5	Set to Number of minutes before automatic logout

At the bottom right of the window, there are 'Update' and 'Delete' buttons.

Site Options - PDT Sales section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Auto Logout	Type True to automatically log out PDTs after a transaction has been completed.
Login Check	Type True to require individual staff logins on PDT transactions, or False to only use the base PDT login.
Login Timeout	Type the number of minutes before PDTs automatically log out.

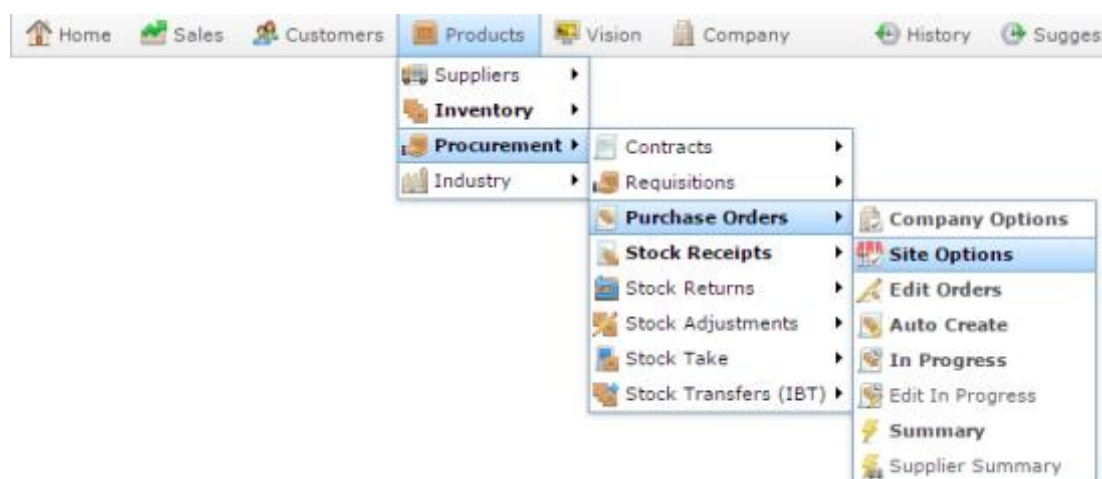
Configuring purchase order options for your site

Configure how purchase orders should operate within the Portal using the Site options - Purchase orders screen.

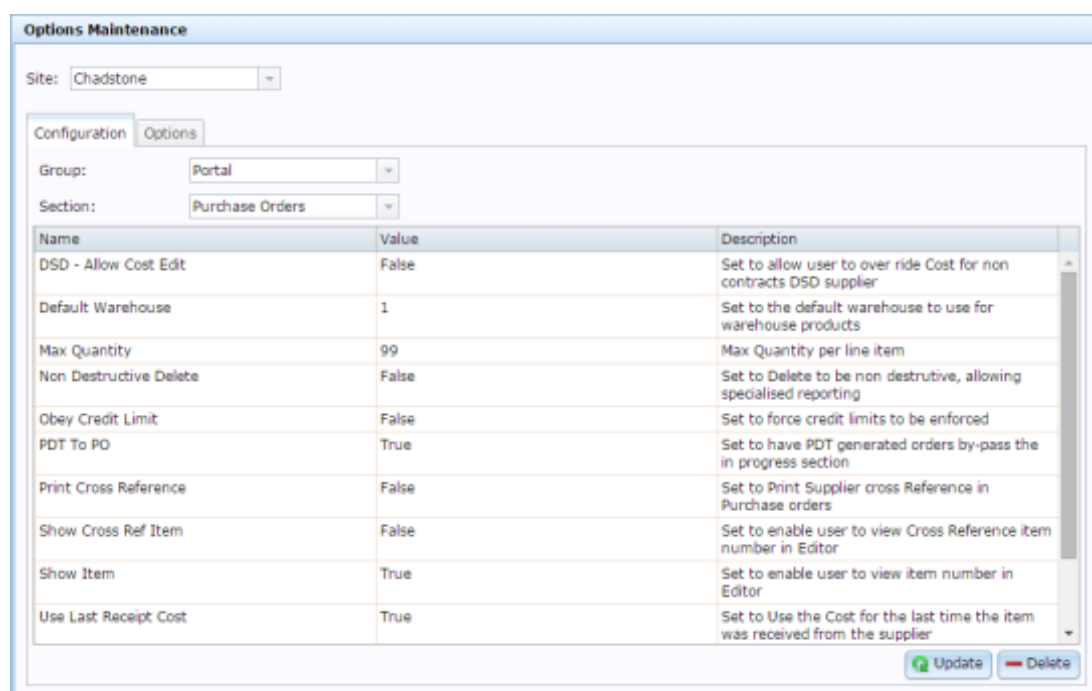
Opening Site options - Purchase orders screen

To open the Site options - Purchase orders screen:

1. Press  Products .
2. Press Procurement > Purchase Orders > Site Options.



The Site Options - Purchase Orders screen is displayed.

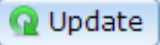


The screenshot shows the 'Options Maintenance' screen for the 'Purchase Orders' section. The site is set to 'Chadstone'. The configuration is for the 'Portal' group and 'Purchase Orders' section. The table below lists the options and their values.

Name	Value	Description
DSD - Allow Cost Edit	False	Set to allow user to over ride Cost for non contracts DSD supplier
Default Warehouse	1	Set to the default warehouse to use for warehouse products
Max Quantity	99	Max Quantity per line item
Non Destructive Delete	False	Set to Delete to be non destructive, allowing specialised reporting
Obey Credit Limit	False	Set to force credit limits to be enforced
PDT To PO	True	Set to have PDT generated orders by-pass the in progress section
Print Cross Reference	False	Set to Print Supplier cross Reference in Purchase orders
Show Cross Ref Item	False	Set to enable user to view Cross Reference item number in Editor
Show Item	True	Set to enable user to view item number in Editor
Use Last Receipt Cost	True	Set to Use the Cost for the last time the item was received from the supplier

Buttons: Update, Delete

Site options - Purchase orders screen key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
DSD - Allow Cost Edit	Type True to allow operators to override an item's cost when ordering directly from suppliers without a contract.
Default Warehouse	Type the supplier number of the supplier to use as the default company warehouse.
Max Quantity	Type in the maximum quantity allowed per line item, to prevent accidental over-ordering.
Non Destructive Delete	Type True to use non-destructive deletion so information is retained for special reports.
Obey Credit Limit	Type True to ensure purchase orders obey supplier credit limits.
PDT to PO	Type True to by-pass the In progress stage for purchase orders that have been created on a PDT.

Configuration	Description
Print Cross Reference	Type True to print the supplier cross reference on the purchase orders.
Show Cross Ref Item	Type True to show the supplier's item code for each item in the purchase order editor.
Show Item	Type True to show the item number in the purchase order editor.
Use Last Receipt Cost	Type True to update the item's cost with the most recent item cost from stock receipts. Type False to use an average of all item costs from stock receipts.
Warehouse - Allow Cost Edit	Type True to allow operators to edit the cost of items ordered from the company warehouse.
Warehouse - Allowed All	Type True to allow all items to be ordered from the company warehouse. Type False to enforce that warehouse items are ordered from the company warehouse, and not directly from a debtor-supplier.

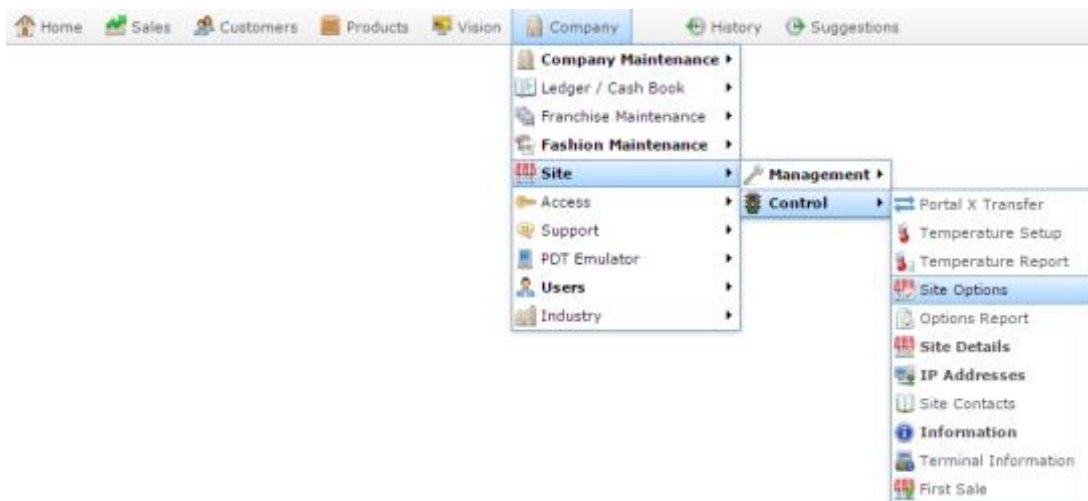
Configuring stock receipting options for your site

Use the Site Options - Stock Receipts section to configure your site for receiving stock from a supplier.

Opening the Site Options - Stock Receipts section

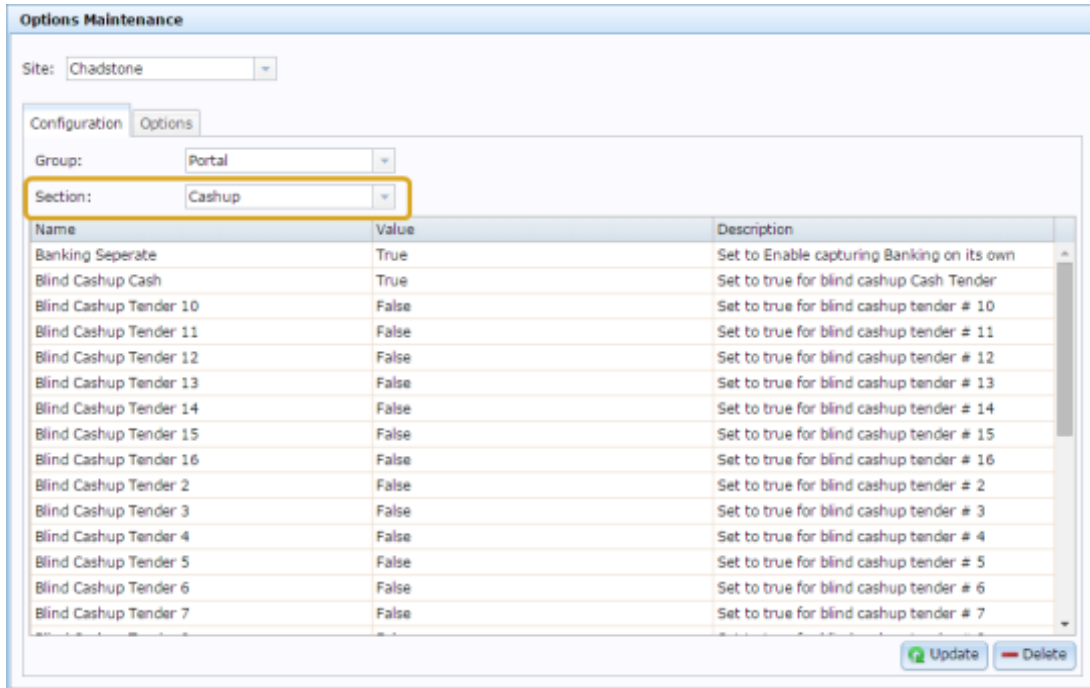
To open the Site Options - Stock Receipts section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



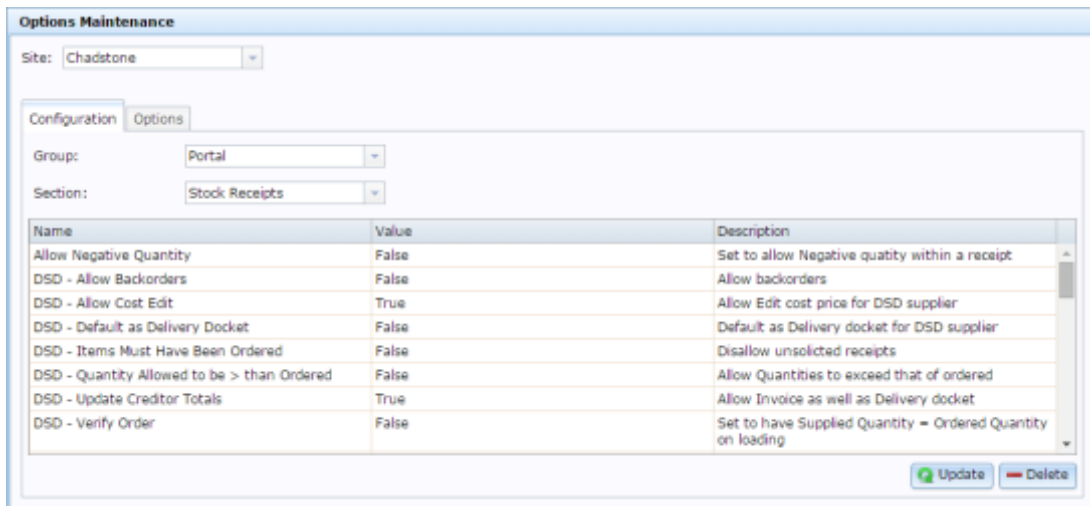
The Cashush section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

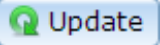


4. Select Stock Receipts from the Section drop-down list.

The Stock Receipts section is displayed.



Site Options - Stock Receipts section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Display All Totals	Type True to display additional totals with tax information on the Stock Receipts screen.
Enable Matrix Price Screen	Type True to display the Price Matrix screen when a stock receipt has been finalised.
Enter via Line Total	Type True to input item quantities by line total by default when creating stock receipts. Note: You can change this individually for each stock receipt.
Fees Tax Rate	Type the tax rate percentage to use for supplier fees. For example, 10 is a 10% tax rate. Note: Supplier fees are only used with Invoice type stock receipts.

Configuration	Description
Freight Tax Rate	<p>Type the tax rate percentage to use for freight and delivery charges. For example, 10 is a 10% tax rate.</p> <div data-bbox="911 488 1390 656" style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px;"> <p>Note: Delivery charges are only used with Invoice type stock receipts.</p> </div>
Labels	<p>Type True to allow operators to create Item, Shelf and Advertising labels after finalising a stock receipt.</p>
Labels for Open Receipts	<p>Type True to allow labels to be generated from a stock receipt that hasn't been finalised.</p>
Non Destructive Delete	<p>Type True to keep stock receipt headers when deleting a stock receipt.</p>
Search by XRef First	<p>Type True to search for items using the supplier's item code before searching for the item using the Portal item code.</p> <div data-bbox="911 1518 1390 1720" style="border: 1px solid #c08040; background-color: #fff9e6; padding: 5px;"> <p>Tip: Set this to True to speed up searches if you usually receipt items using the supplier code instead of your own code.</p> </div>
Show Cross Ref Item	<p>Type True to display the supplier's item code on the stock receipt.</p>

Configuration	Description
Show Item	Type True to show the item description in stock receipts.
Show Rejected Column	Type True to display a column for rejected stock on the stock receipt.
Single PO Per Receipt	Type True to allow only one purchase order to be processed in a stock receipt.
Split Freight Creditor Update	Type True to display the supplier fees and freight charges as separate lines on the invoice.
Update On Order for Unsolicited	Type True to update the Stock On Order count when receipting items that were not included in the purchase order.
Update Retail on Cost Change	Type True to automatically update the retail cost when the supplier's cost of the item changes.
Update Retail on Cost Change Reduction	Type True to automatically update the retail cost when the supplier's cost of the item decreases.

Note: Set Update Retail On Cost Change to True and this field to **False** if you want to update the retail price only when the cost of the item increases.

Configuration	Description
Warehouse - Allow Backorders	Type True to automatically create a second purchase order for back-ordered items when receipting from the warehouse.
Warehouse - Allow Cost Edit	Type True to allow operators to edit item costs when receipting from the warehouse.
Warehouse - Allow Free Goods	Type True to allow items to be received without cost when receipting stock from the warehouse.
Warehouse - Allowed All	Type True to permit all items to be received from the warehouse.
Warehouse - Default As Delivery Docket	Type True to use the Delivery docket type of stock receipt for the warehouse by default.
Warehouse - Items Must Have Been Ordered	Type True to restrict stock receipting to items listed in the purchase order when receipting from the warehouse.
Warehouse - Quantity Allowed to be > than Ordered	Type True to allow operators to receive more stock of an item than was listed in the purchase order when receipting from the warehouse.
Warehouse - Update Creditor Totals	Type True to allow invoice-type stock receipts from the warehouse.

Configuration	Description
Warehouse - Verify Order	Type True to pre-fill the item quantities on stock receipts from the warehouse with the purchase order quantities.
DSD - Allow Backorders	Type True to automatically create a second purchase order for back-ordered items when receipting from direct suppliers.
DSD - Allow Cost Edit	Type True to allow operators to edit item costs when receipting from direct suppliers.
DSD - Default as Delivery Docket	Type True to use the Delivery docket type of stock receipt for direct suppliers by default.
DSD - Items Must Have Been Ordered	Type True to restrict stock receipting to items listed in the purchase order when receipting from direct suppliers.
DSD - Quantity Allowed to be > than Ordered	Type True to allow operators to receive more stock of an item than was listed in the purchase order when receipting from direct suppliers.burmi
DSD - Update Creditor Totals	Type True to allow invoice-type stock receipts from direct suppliers.

Configuration	Description
DSD - Verify Order	Type True to pre-fill the item quantities on stock receipts from a direct supplier with the purchase order quantities.

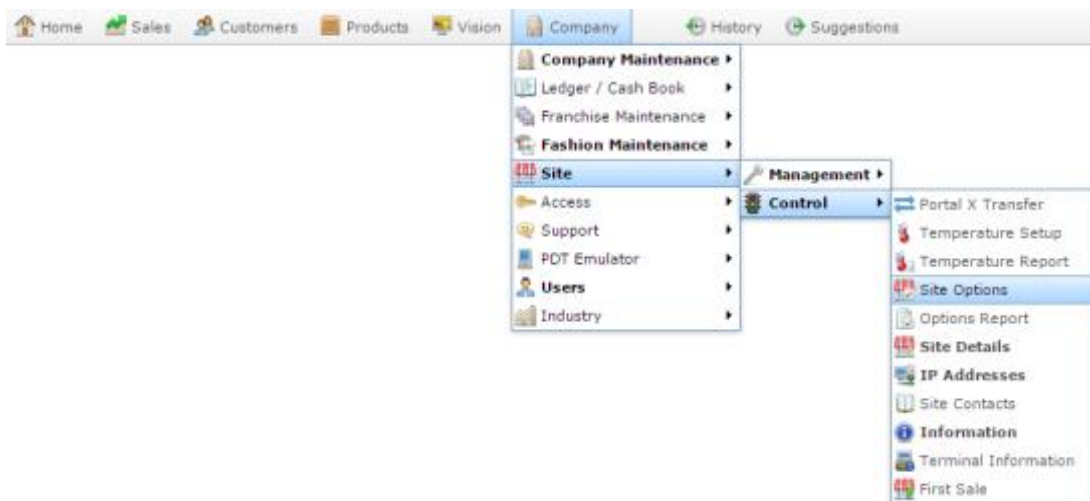
Configuring stock returns for your site

Use the Site Options - Stock Returns section to configure your site for returning stock to a supplier.

Opening the Site Options - Stock Returns section

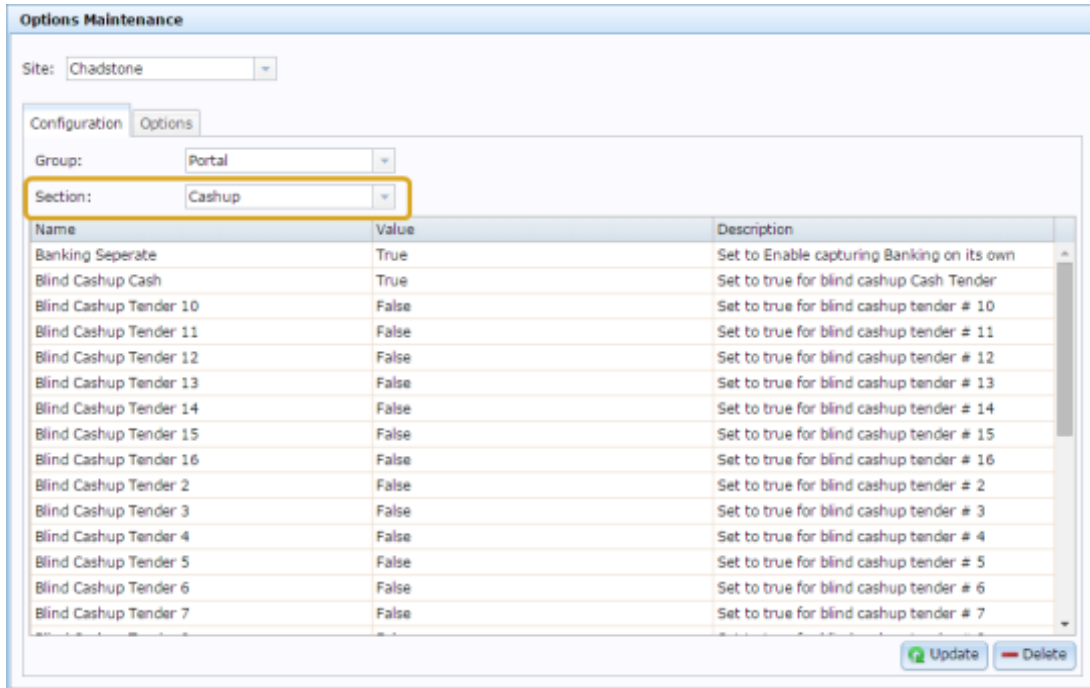
To open the Site Options - Stock Returns section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



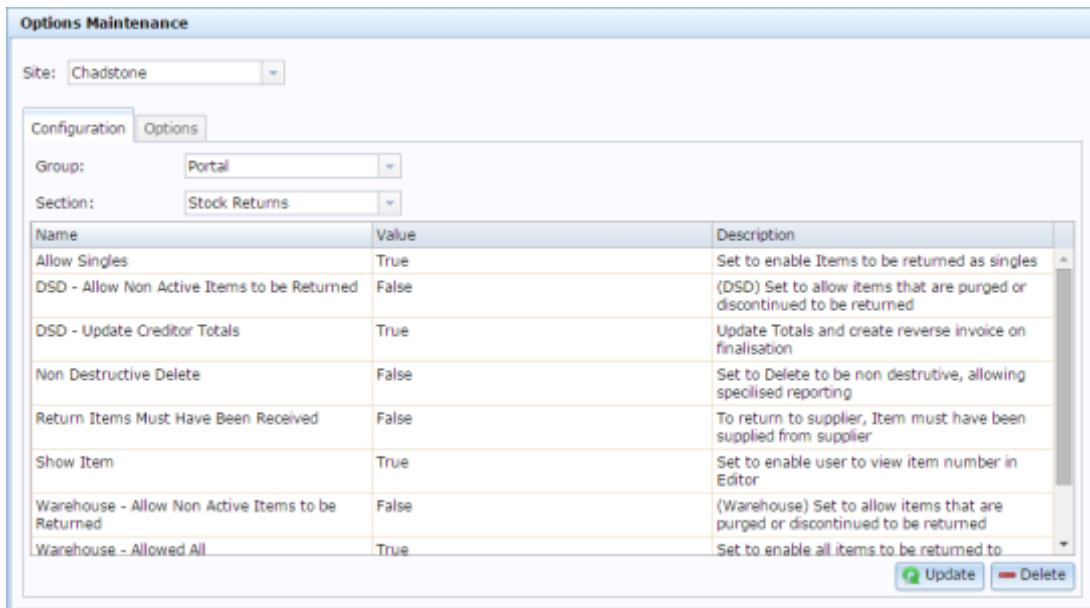
The Cashush section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

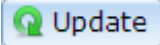


4. Select Stock Returns from the Section drop-down list.

The Stock Returns section is displayed.



Site Options - Stock Returns section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's Value field. To change a Portal configuration, type the new setting information into the Value field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Allow Singles	Type True to allow items to be returned in single units.
DSD - Allow Non Active Items to be Returned	Type True to allow items that are discontinued or purged to be returned to a direct supplier. <i>See Inventory Management - Stock Control tab.</i>
DSD - Update Creditor Totals	Type True to configure the Portal to automatically update creditor account totals and create a reverse invoice for the direct supplier when you finalise the return.
Non Destructive Delete	Type True to mark items as deleted without destroying the data, for reporting purposes.
Return Items Must Have Been Received	Type True to only permit items that have been received from the supplier to be returned to them.
Show Item	Type True to display the item number when returning stock.

Configuration	Description
Warehouse - Allow Non Active Items to be Returned	<p>Type True to allow items that are discontinued or otherwise not active to be returned to the warehouse.</p> <p><i>See Inventory Management - Stock Control tab.</i></p>
Warehouse - Allowed All	<p>Type True to allow all items to be returned to the warehouse, even if they haven't been received from the warehouse.</p>
Warehouse - Update Creditor Totals	<p>Type True to configure the Portal to automatically update creditor account totals and create a reverse invoice for the warehouse when you finalise the return.</p>

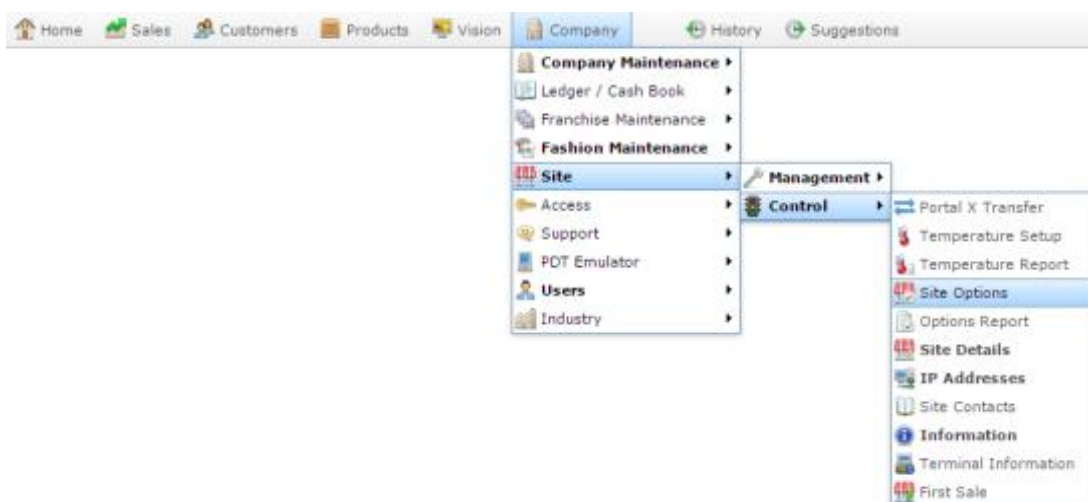
Configuring sales targets for your site

Use the Site Options - Sales Targets section to configure the target sales figures for each day of the week.

Opening the Site Options - Sales Targets section

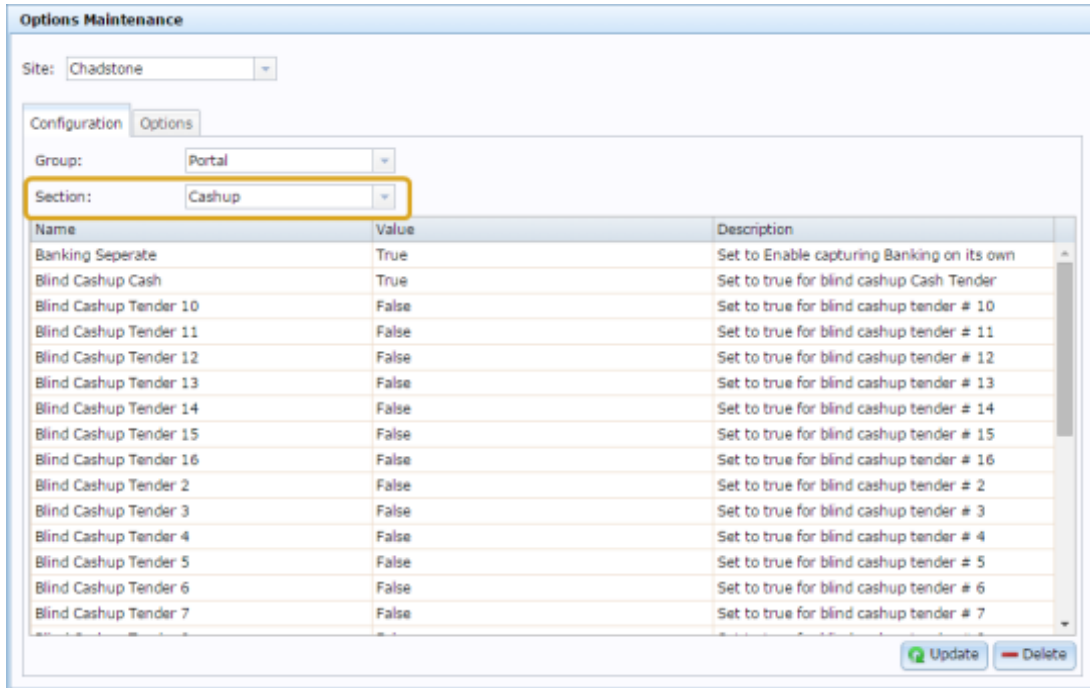
To open the Site Options - Sales Targets section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



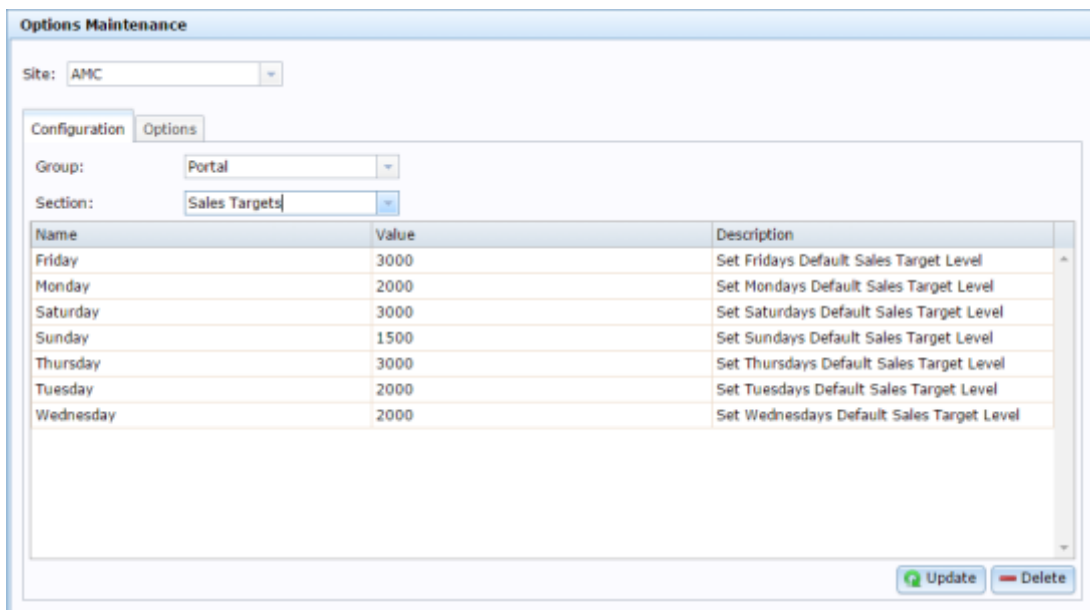
The Cashush section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.



4. Press Sales Targets from the Section drop-down list.

The Sales Targets section is displayed.



Site Options - Sales Targets section key fields and buttons

Field	Description
Day of the week	Type the default total sales figure for this day of the week.

Configuring the scheduler for your site

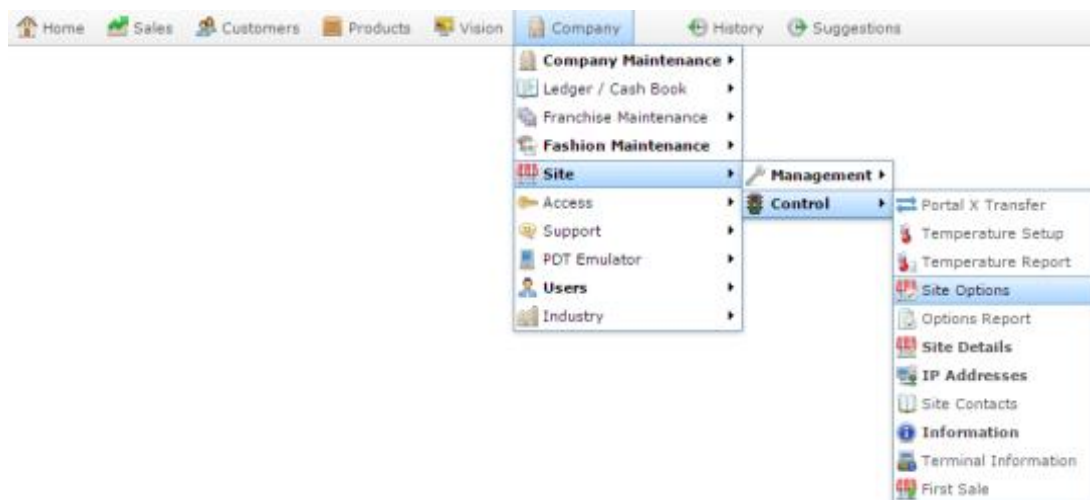
Use the Site Options - Scheduler section to configure your site to use the external scheduler to manage appointments.

See *Managing the Scheduler*.

Opening the Site Options - Scheduler section

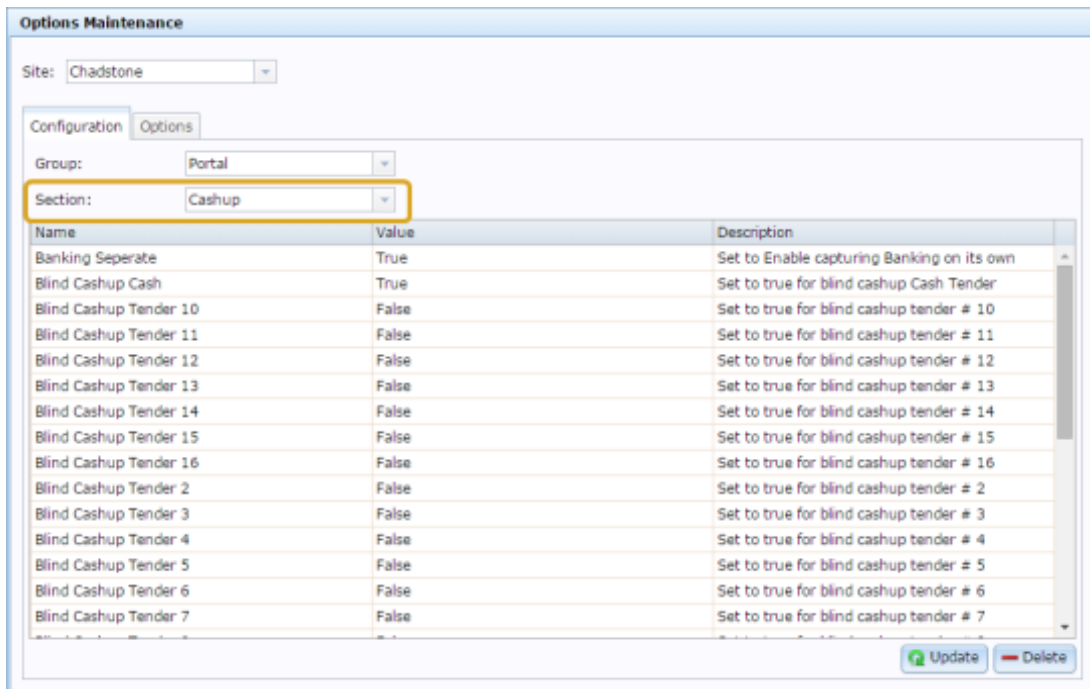
To open the Site Options - Scheduler section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



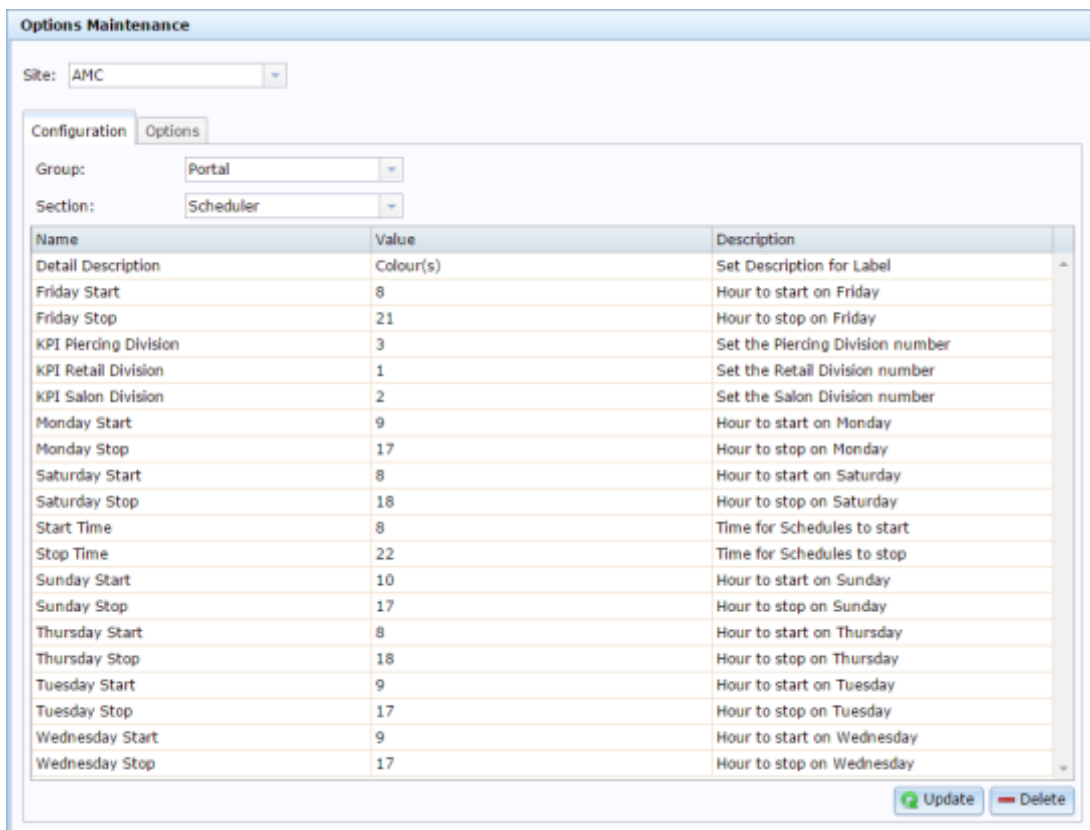
The Cashup section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.



4. Press Scheduler from the Section drop-down list.

The Scheduler section is displayed.



Site Options - Scheduler section key fields and buttons

Field	Description
Detail Description	Type the description to appear for labels.
Day-of-week Start	Type the hour to open business on this day of the week. Note: Type a number in 24 hour time. For example, if you want to start at 9am, type 9 . If you want to start at 5pm, type 17 .
Day-of-week Stop	Type the hour to close business on this day of the week. Note: Type a number in 24 hour time. For example, if you close at 5pm type 17 .
KPI Piercing Division	Type the number of the division used for this schedule area. Note: The divisions listed here depend on your Portal configuration.
KPI Retail Division	Type the number of the division used for this schedule area.
KPI Salon Division	Type the number of the division used for this schedule area.

Field	Description
Start Time	Type the earliest hour appointments can be scheduled, independent of whether your business is open during this time. <div data-bbox="911 524 1391 801"><p>Note: Type the number in 24-hour time. For example, if the earliest appointment is 2pm, type 14. Appointments cannot be scheduled before this time, even if your business is open.</p></div>
Stop Time	Type the hour that appointments can't be scheduled past, independent of whether your business is open during this time. <div data-bbox="911 1037 1391 1352"><p>Note: Type the number in 24-hour time. For example, if the latest appointment is 2pm, type 14. Appointments cannot be scheduled past this time or extend into this time, even if your business is open.</p></div>

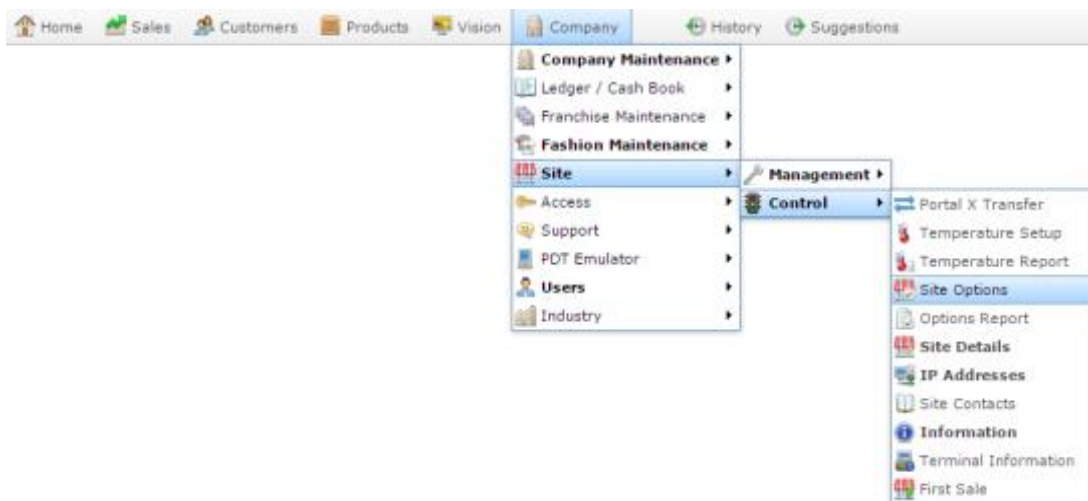
Configuring serial numbers for your site

Use the Site Options - Serial Number section to configure your site to control how serial numbers are processed.

Opening the Site Options - Serial Number section

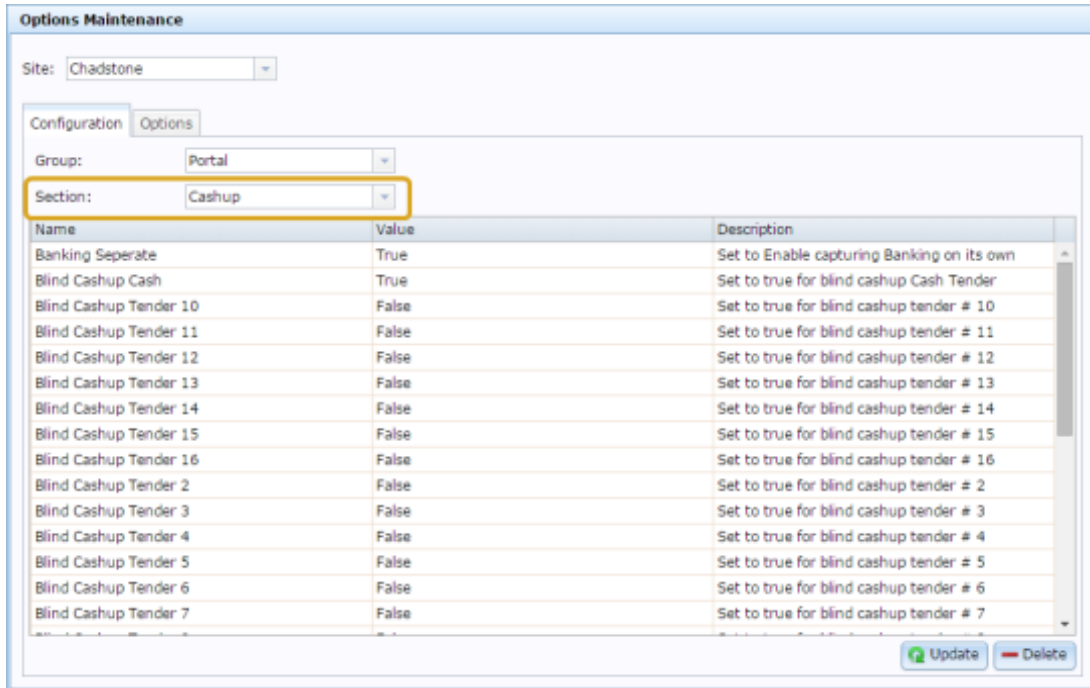
To open the Site Options - Serial Number section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



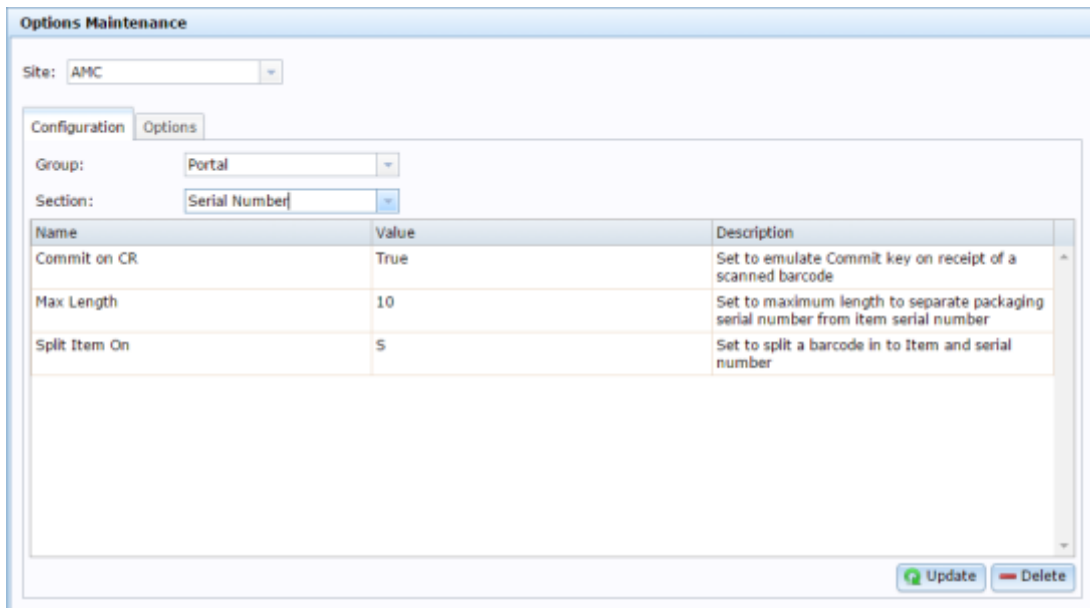
The Cashush section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.



4. Press Serial Number from the Section drop-down list.

The Serial Number section is displayed.



Site Options - Serial Number section key fields and buttons

Field	Description
Commit on CR	Type True if you want the scanner to commit each scanned barcode to the system. Type False if you want to commit barcodes manually.
Max Length	Type the maximum number of digits that the packaging component of a barcode may be.
Split Item On	Type the character used to separate the packaging and item barcode sections.

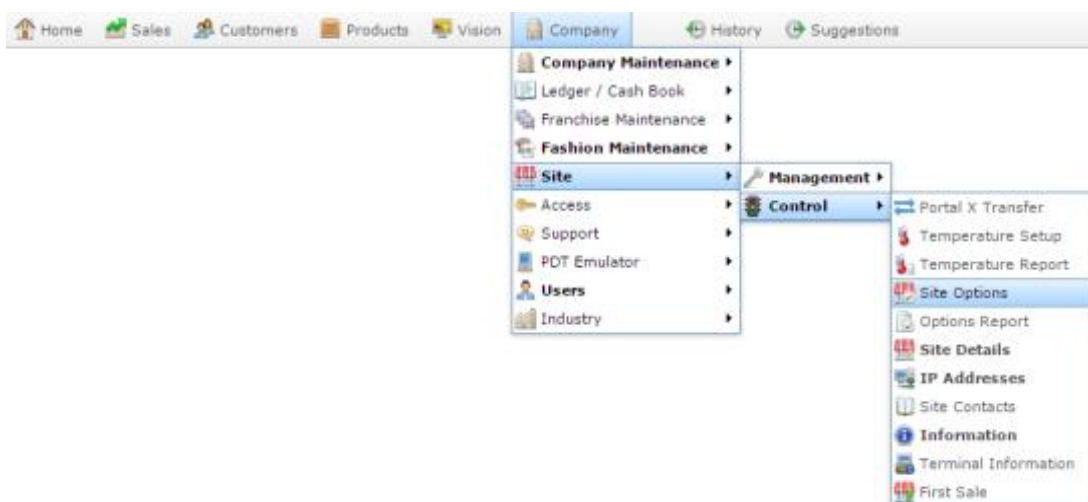
Configuring stock take for your site

Use the Site Options - Stock Take section to configure your site for stocktaking to determine accurate stock-on-hand levels.

Opening the Site Options - Stock Take section

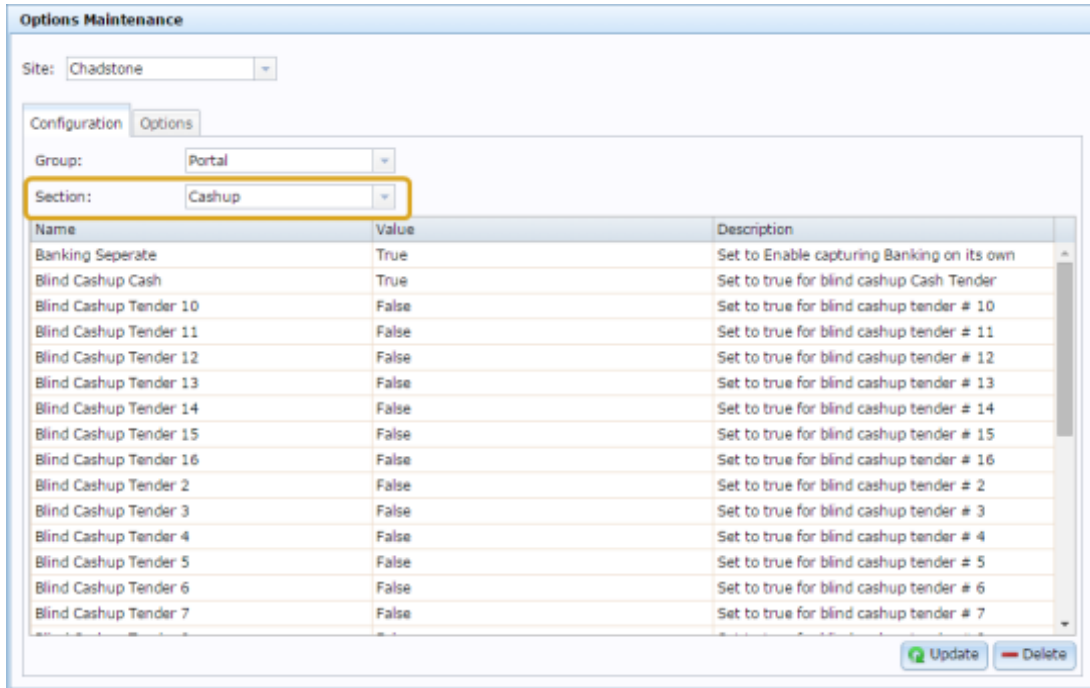
To open the Site Options - Stock Take section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



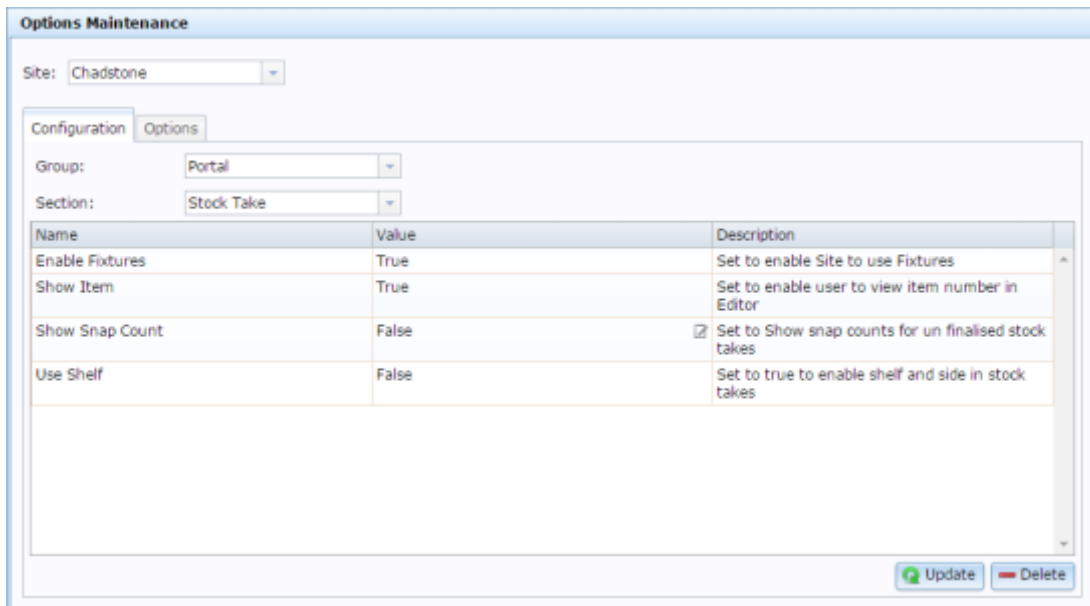
The Cashush section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

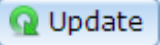


4. Select Stock Take from the Section drop-down list.

The Stock Take section is displayed.



Site Options - Stock Take section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Configuration	Description
Enable Fixtures	Type True to use fixtures to group stock counts by gondola or stock fixture. Otherwise, stocktakes are counted across the entire site at once.
Show Item	Type True to display the item code in the stock take editor.
Show Snap Count	Type True to display the snap counts during stock takes.
Use Shelf	Type True to enable shelf and side item counts when using fixtures.

Configuring table service for your site

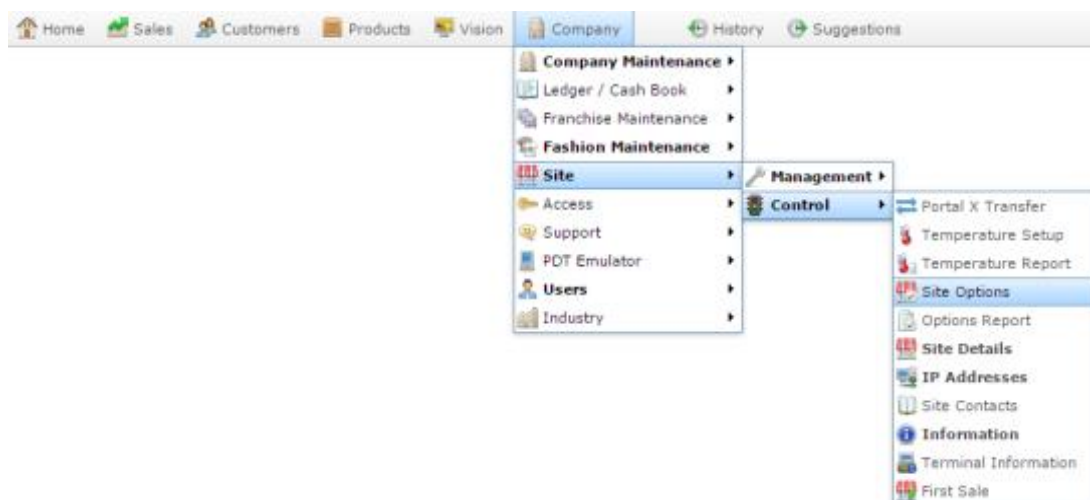
Use the Site Options - Table section to configure your site for table service.

Note: You can configure additional service charges and taxes on the iZen Point of Sale. Those charges are in addition to the charges configured here.

Opening the Site Options - Table section

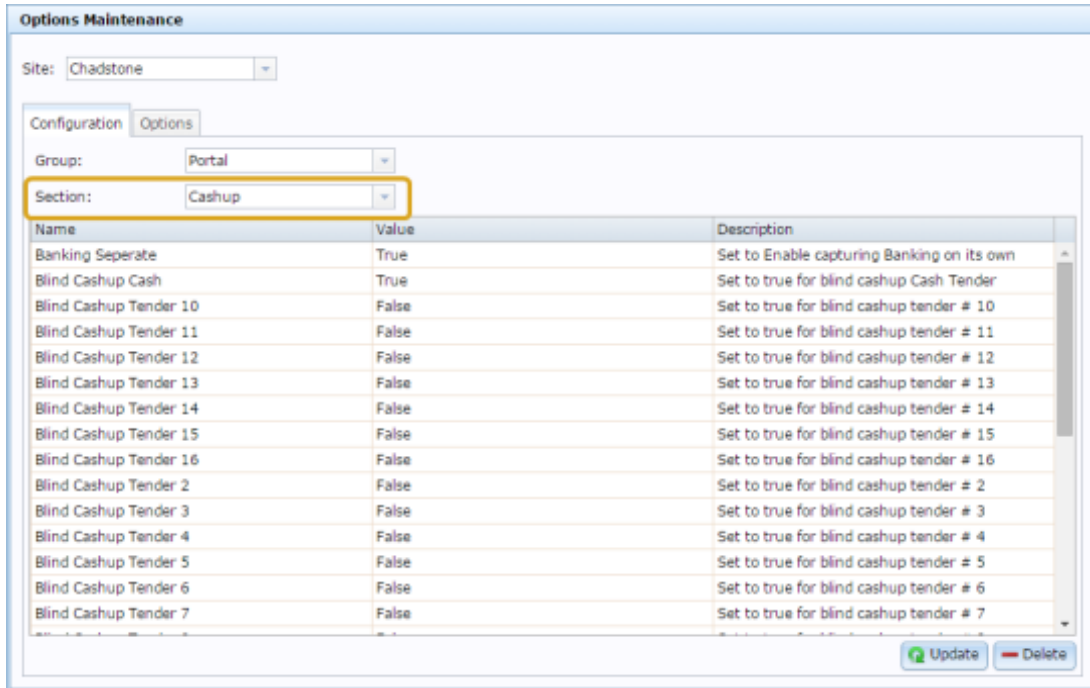
To open the Site Options - Table section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



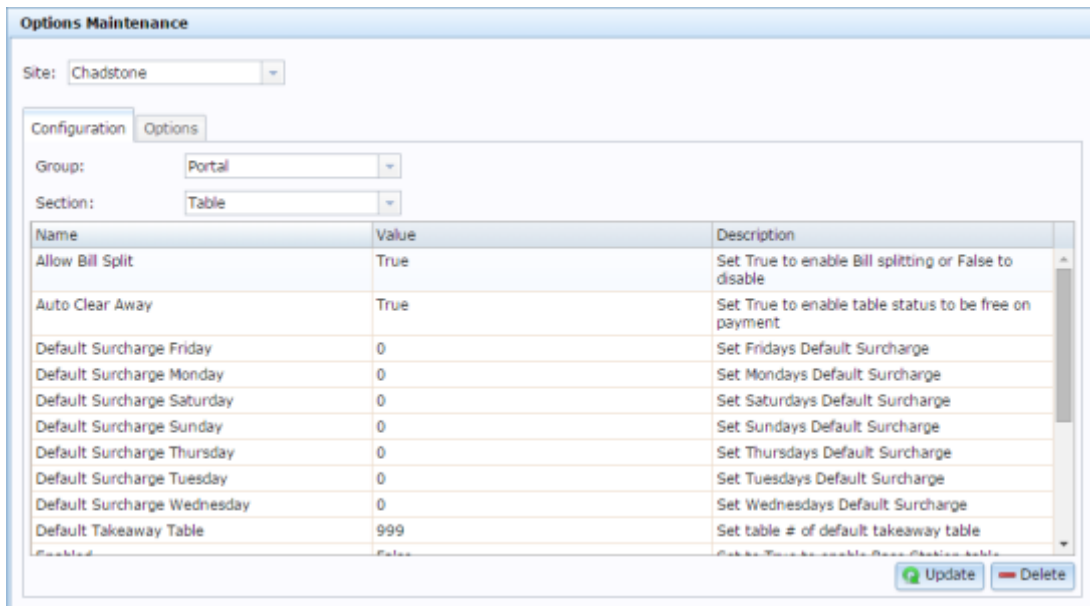
The Cashup section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.

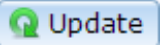


4. Select Table from the Section drop-down list.

The Table section is displayed.



Site Options - Table section key fields and buttons

Note: The Portal is controlled by the information saved in each configuration's **Value** field. To change a Portal configuration, type the new setting information into the **Value** field and press .

Name	Value	Description
Example Field Name	Example Value	Description of configuration

Note: The following configuration settings are not currently in use by the iZen Point of Sale table service system.

Configuration	Description
Allow Bill Split	Type True to allow customers to split bills in a single transaction, where each customer pays for the specific meals or items they ordered.
Auto Clear Away	Type True to immediately make tables available once payment has been made, or False to require Point of Sale operators to mark tables as free manually.
Default Surcharge (Day)	Type the default service charge to be applied to table transactions on the specified day.
Default Takeaway Table	Type the table number to be used by default for takeaway orders.

Configuration	Description
Enabled	Type True to print items to the kitchen. Type False to prevent all printing to the kitchen printers.
Full Tracking	Type True to track what items are sold on which tables and when.
Set Print Ready On Add	Type True to ensure the iZen Point of Sale prints newly added items in the kitchen printer.
	<p>Note: If you are not using the iZen Point of Sale, you can ignore this configuration.</p>
Surcharge Department	Type the department code to use for surcharges.
Surcharge Tax Rate	Type the tax rate to apply to surcharges.
Table Description	Type the label used for tables. For example, Pole, Tag, Table.
Update Table Sales	Type True to record a sales history for each table.

Configuring voucher enquiries for your site

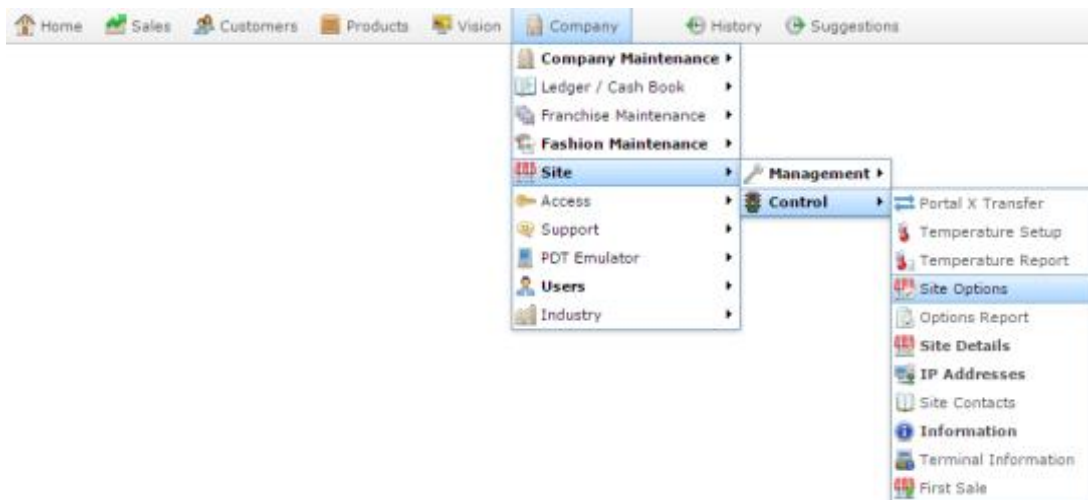
Use the Site Options - Voucher Enquiry section to configure how your site queries external vendors for gift vouchers.

Note: This configuration setting is only used with external system vouchers. You do not need to configure this if you are using the Portal voucher system.

Opening the Site Options - Voucher Enquiry section

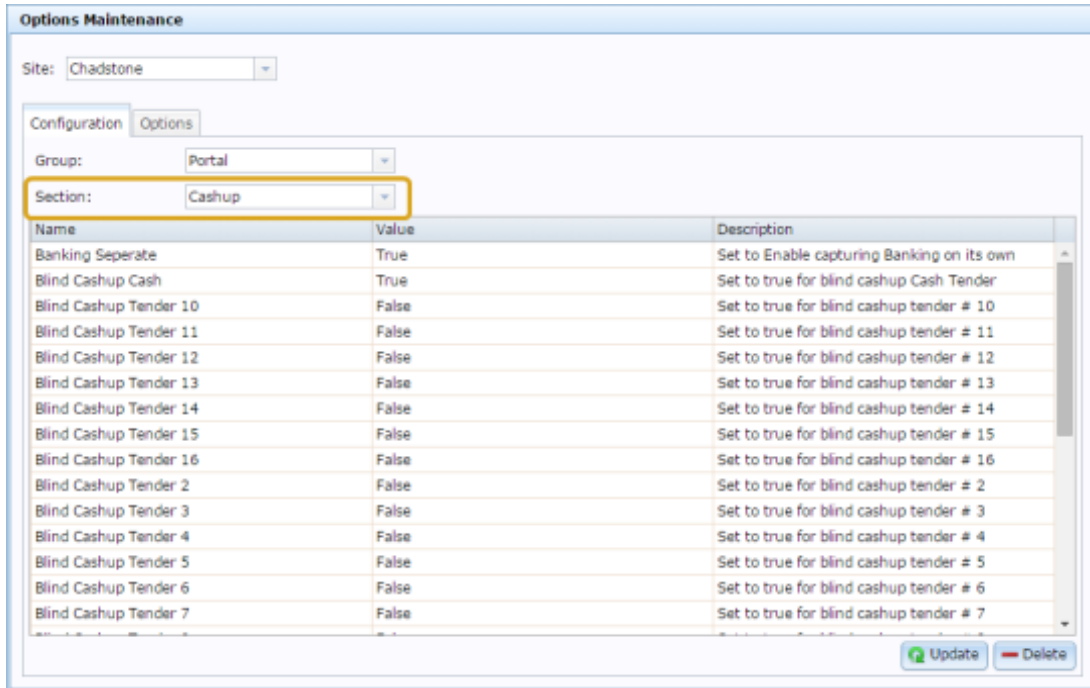
To open the Site Options - Voucher Enquiry section:

1. Press  **Company**.
2. Press **Site > Control > Site Options**.



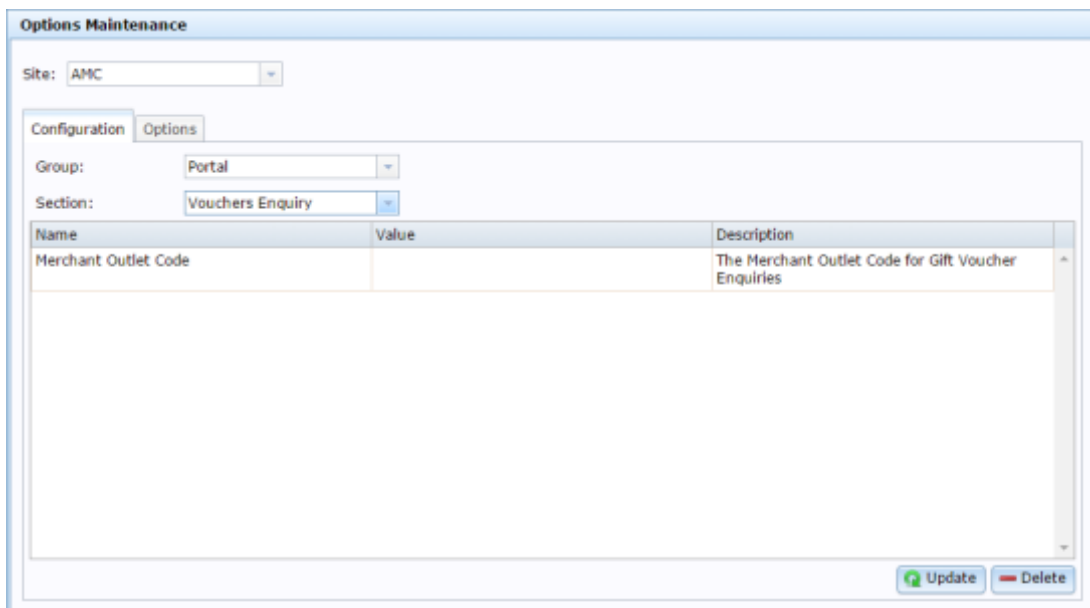
The Cashup section of the Site Options screen is displayed.

3. Open the **Section** drop-down list.



4. Press Voucher Enquiry from the Section drop-down list.

The Voucher Enquiry section is displayed.



Site Options - Voucher Enquiry section key fields and buttons

Field	Description
Merchant Outlet Code	Type the merchant code to use for external gift voucher enquiries.

Configuring WEB customer orders for your site

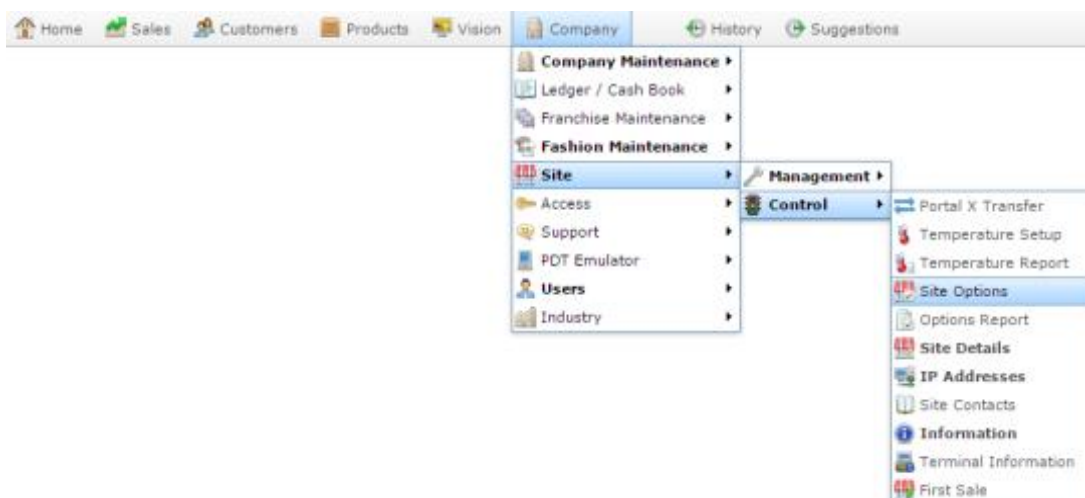
Use the Site Options - WEB Customer Orders section to configure your site to control how departments are handled with an external web sales page.

Note: This configuration setting only applies to external site submitted web orders. If you do not use an external non-Portal site to submit customer orders, you can ignore this configuration.

Opening the Site Options - WEB Customer Orders section

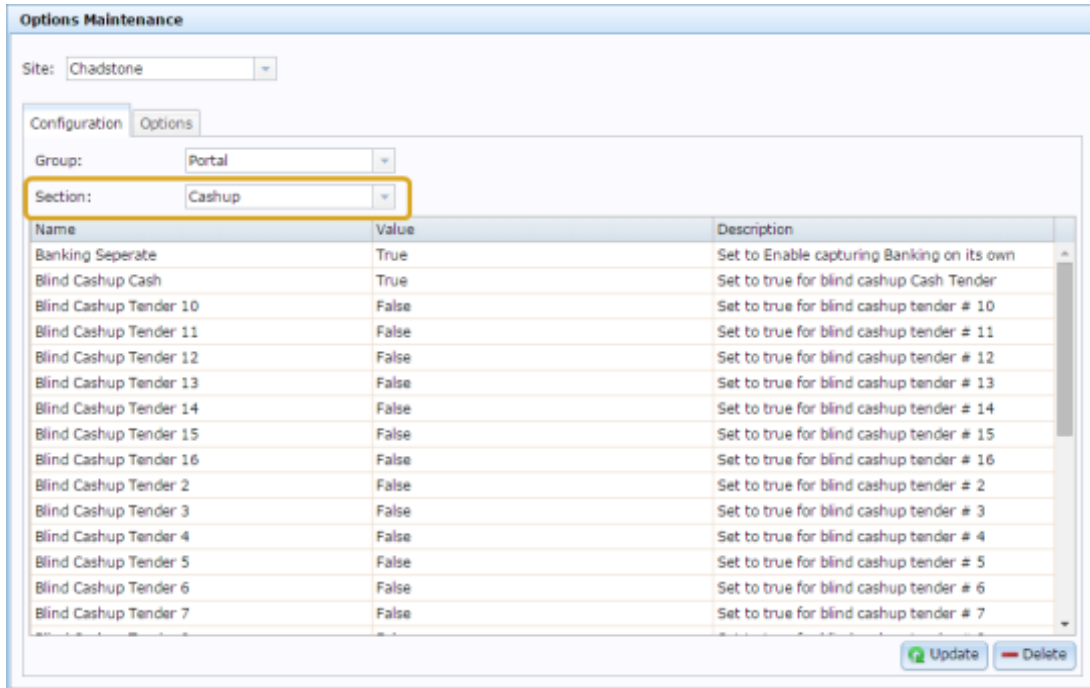
To open the Site Options - WEB Customer Orders section:

1. Press  Company.
2. Press Site > Control > Site Options.



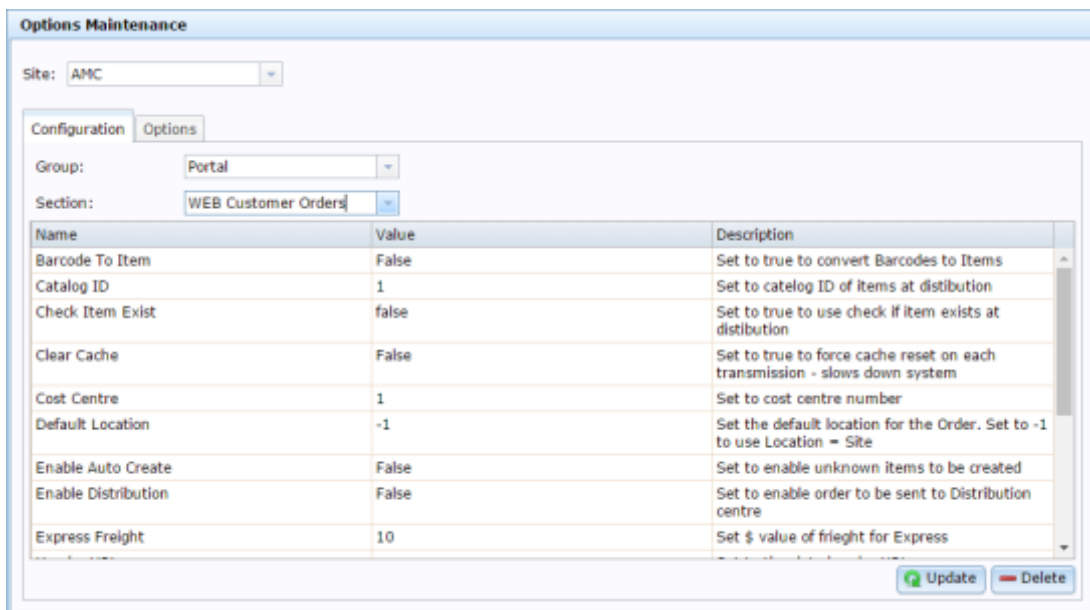
The Cashup section of the Site Options screen is displayed.

3. Open the Section drop-down list.



4. Press WEB Customer Orders from the Section drop-down list.

The WEB Customer Orders section is displayed.



Site Options - WEB Customer Orders section key fields and buttons

Field	Description
Barcode To Item	Type True to automatically convert barcodes to items.
Catalog ID	The identification for the distribution centre.
Check Item Exist	Type True to check whether the item exists when submitting the order.
Clear Cache	Type True to activate a cache clear at the distribution centre after each transmission.
Cost Centre	Type the code of the cost centre for WEB customer orders.
Default Location	Type the number of the default location for orders. Type -1 to use the site as the location.
Enable Auto Create	Type True to allow the WEB customer order system to create new items in the Portal if the item does not exist.

Field	Description
Enable Distribution	Type True if data should be sent to the distribution centre for the dispatch of orders.
Express Freight	Type the amount to charge in dollars for express freight.
Header URL	Type the URL to use as the SOAP interface for the distribution centre.
Include Redemption Points	Type True to allow loyalty points to be redeemed when purchasing WEB customer orders.
Inline Distribution	Type True to enforce that as part of the transaction, the website received an acknowledgement that the distribution centre received the order.
Order Password	Type the password for the distribution centre.
Order User	Type the username to access the distribution centre.
Product Password	Type the product system password.
Product User	Type the product system username.

Field	Description
URL	Type the internal data URL used by the distribution centre, to be sent inside the SOAP packet.
User Soap Interface	Type True to use the SOAP interface to communicate with the distribution centre.

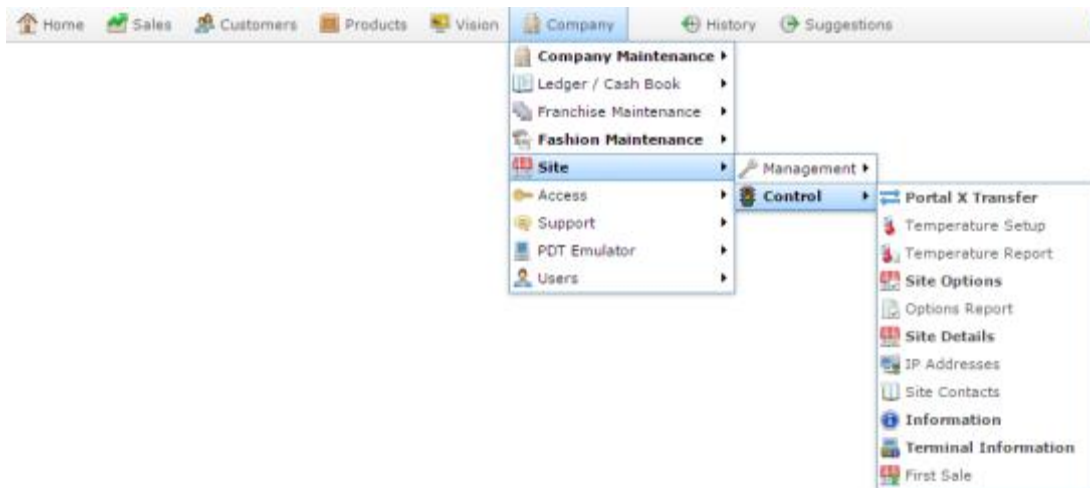
Site Options report

Use the Site Options report to view the options you have configured for a site.

Opening the Site Options report

To open the Site Options report:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Options Report**.



The Site Options report is displayed.

Sites Options Report

Group	Section	Name	Value	Information
Portal	Scheduler	Thursday Start	8	Hour to start on Thursday
Portal	Scheduler	Thursday Stop	18	Hour to stop on Thursday
Portal	Scheduler	Friday Start	8	Hour to start on Friday
Portal	Scheduler	Friday Stop	21	Hour to stop on Friday
Portal	Scheduler	Saturday Start	8	Hour to start on Saturday

Site:

Section:

Site Options report key fields

Filters area

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

Field	Description
<input type="button" value="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.
Section	Select to filter the report to a section of the site options.

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
Group	Specifies whether this configuration relates to the Portal, or another source such as GSA.
Section	The section of configurations this configuration relates to.
Name	The name of the configuration.
Value	The value the configuration has been set to.
Information	Information provided about the purpose and use of this configuration.

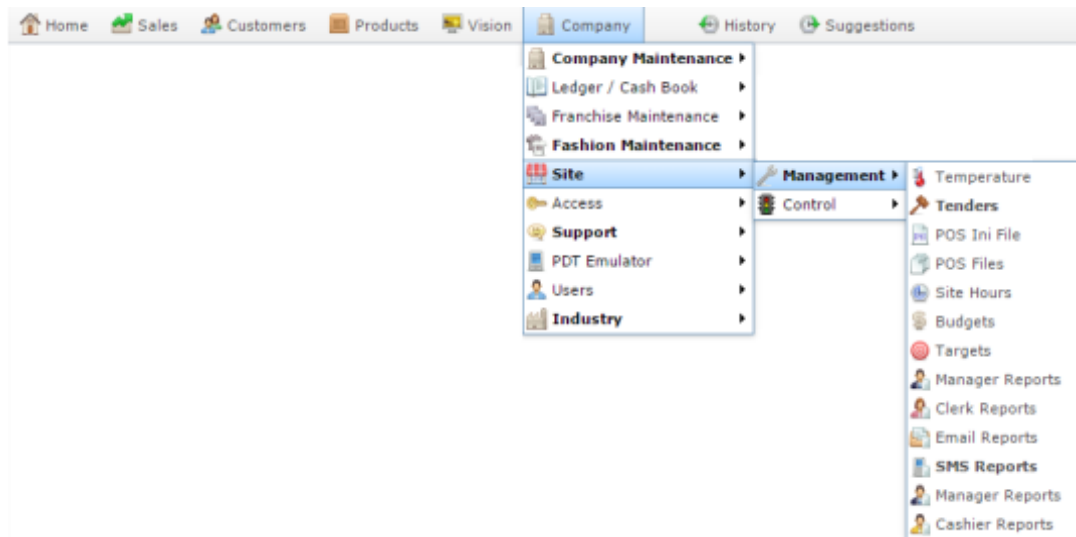
POSIni File Options Maintenance screen

Use this screen to configure the Point of Sale initialisation and basic operations.

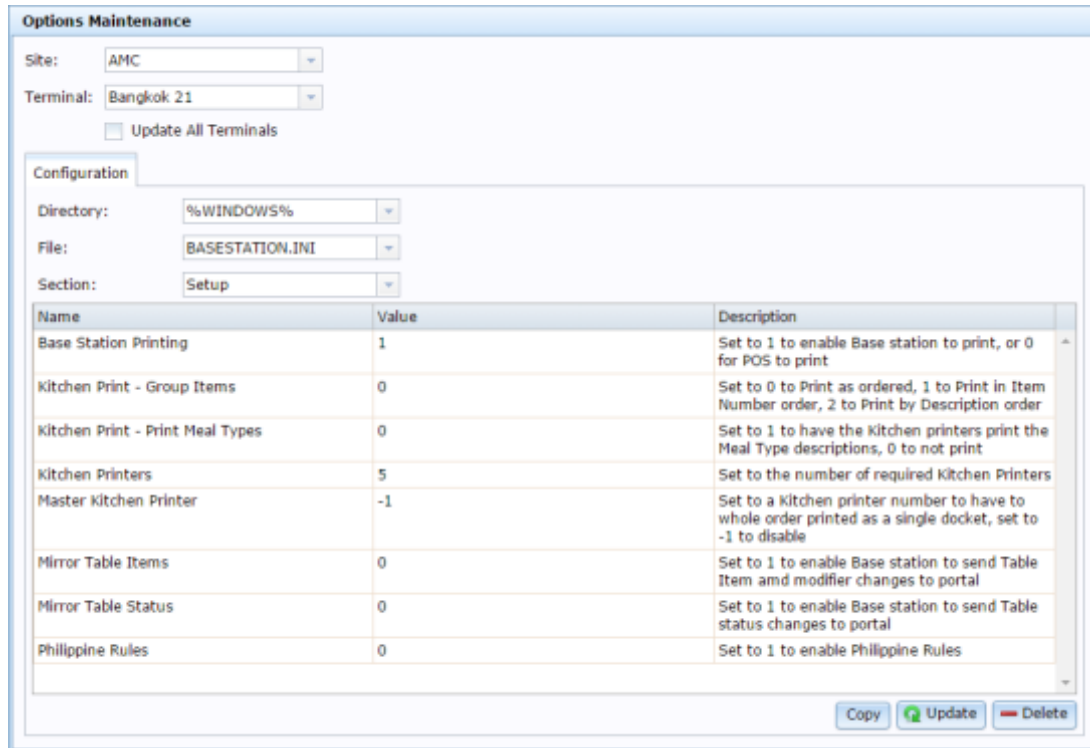
Opening the POS Ini File Maintenance screen

To open the POS Ini File Maintenance screen:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > POS Ini File**.




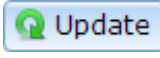

The Base station initialisation area of the POS Ini File Maintenance screen is displayed.



POS Ini File Maintenance screen key fields and buttons

Common fields and buttons

Field	Description
Site	Select the site you want to change or view the configuration of.
Terminal	Select the terminal you want to change or view the configuration of.
Update All Terminals	Select to save these changes to all terminals at this site.
Directory	Select the main area of configuration you want to view.
File	Select the sub-area of configuration you want to view within the Directory.

Field	Description
Section	Select the section of configuration you want to view within the File.
	Copy this configuration to another terminal.
	Save your changes to this configuration and send it to the terminal.
	Delete this configuration.

Base station initialisation area

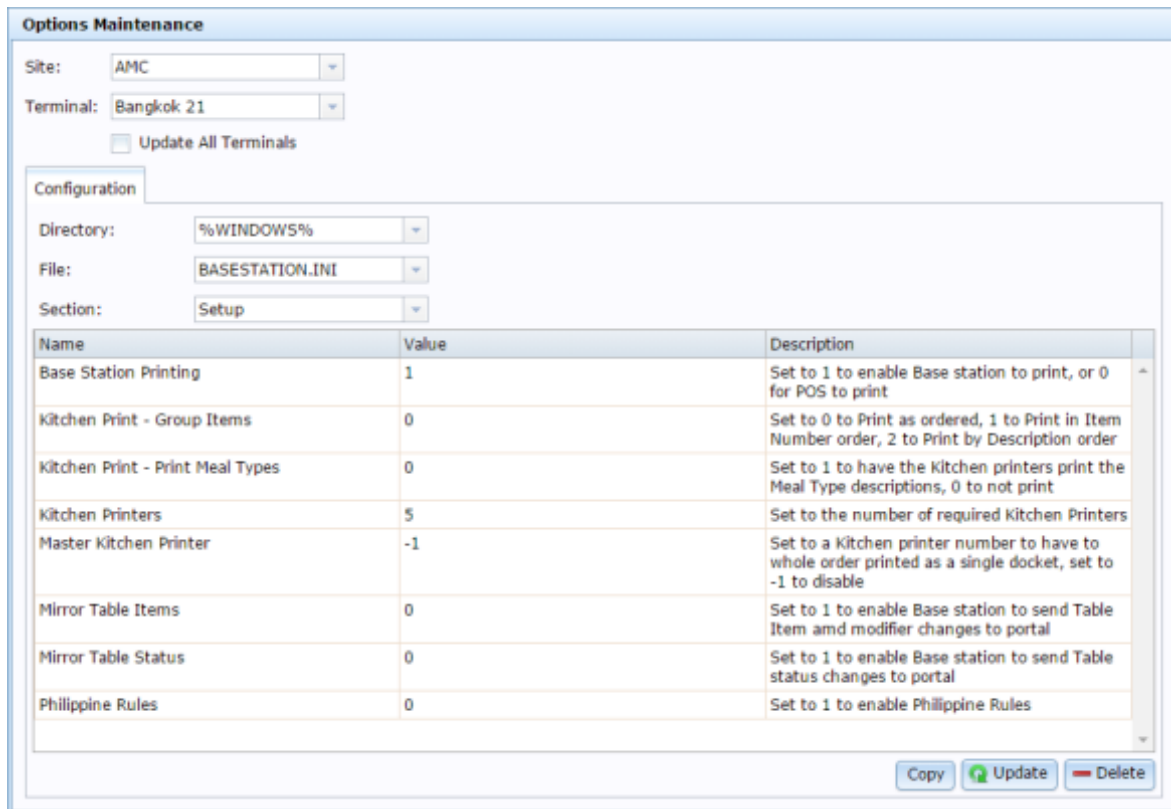
Use this area to define key aspects of how the base station functions.

Opening this area:

To open this area:

1. Select %WINDOWS% in the Directory drop-down field.
2. Select BASESTATION.INI in the File drop-down field.

The area is displayed.



The screenshot shows the 'Options Maintenance' window with the 'Configuration' tab selected. The 'Directory' dropdown is set to '%WINDOWS%', 'File' is 'BASESTATION.INI', and 'Section' is 'Setup'. Below these fields is a table with the following data:

Name	Value	Description
Base Station Printing	1	Set to 1 to enable Base station to print, or 0 for POS to print
Kitchen Print - Group Items	0	Set to 0 to Print as ordered, 1 to Print in Item Number order, 2 to Print by Description order
Kitchen Print - Print Meal Types	0	Set to 1 to have the Kitchen printers print the Meal Type descriptions, 0 to not print
Kitchen Printers	5	Set to the number of required Kitchen Printers
Master Kitchen Printer	-1	Set to a Kitchen printer number to have to whole order printed as a single docket, set to -1 to disable
Mirror Table Items	0	Set to 1 to enable Base station to send Table Item amd modifier changes to portal
Mirror Table Status	0	Set to 1 to enable Base station to send Table status changes to portal
Philippine Rules	0	Set to 1 to enable Philippine Rules

At the bottom right of the window are buttons for 'Copy', 'Update', and 'Delete'.

Field

Description

Base Station Printing

Type 1 to route printing through the base station, or 0 to print directly from the Point of Sale.

Field	Description
Kitchen Print - Group Items	Type: <ul style="list-style-type: none"> ▪ 0 to print items in the order they were added to the transaction. ▪ 1 to print orders in order of their item code. ▪ 2 to print orders alphabetically by description.
Kitchen Print - Print Meal Types	Type 1 to print meal type descriptions with items, or 0 to not print meal type descriptions with items.
Kitchen Printers	Type the number of kitchen printers you have.
Master Kitchen Printer	If you want a single kitchen printer to print a master docket with all items, type the number of the printer. If you do not want to print a master docket with all items, type -1.
Mirror Table Items	Type 1 to send table order item changes to the Portal, or 0 to keep them only on the base station and terminals.
Mirror Table Status	Type 1 to send table status changes to the Portal, or 0 to keep them only on the base station and terminals.
Note: Some reports require data to be sent to the Portal.	
Philippine Rules	Type 1 to enforce the terminal to obey the Philippine Bureau of Internal Revenue (BIR) regulations.

EFTPOS initialisation area

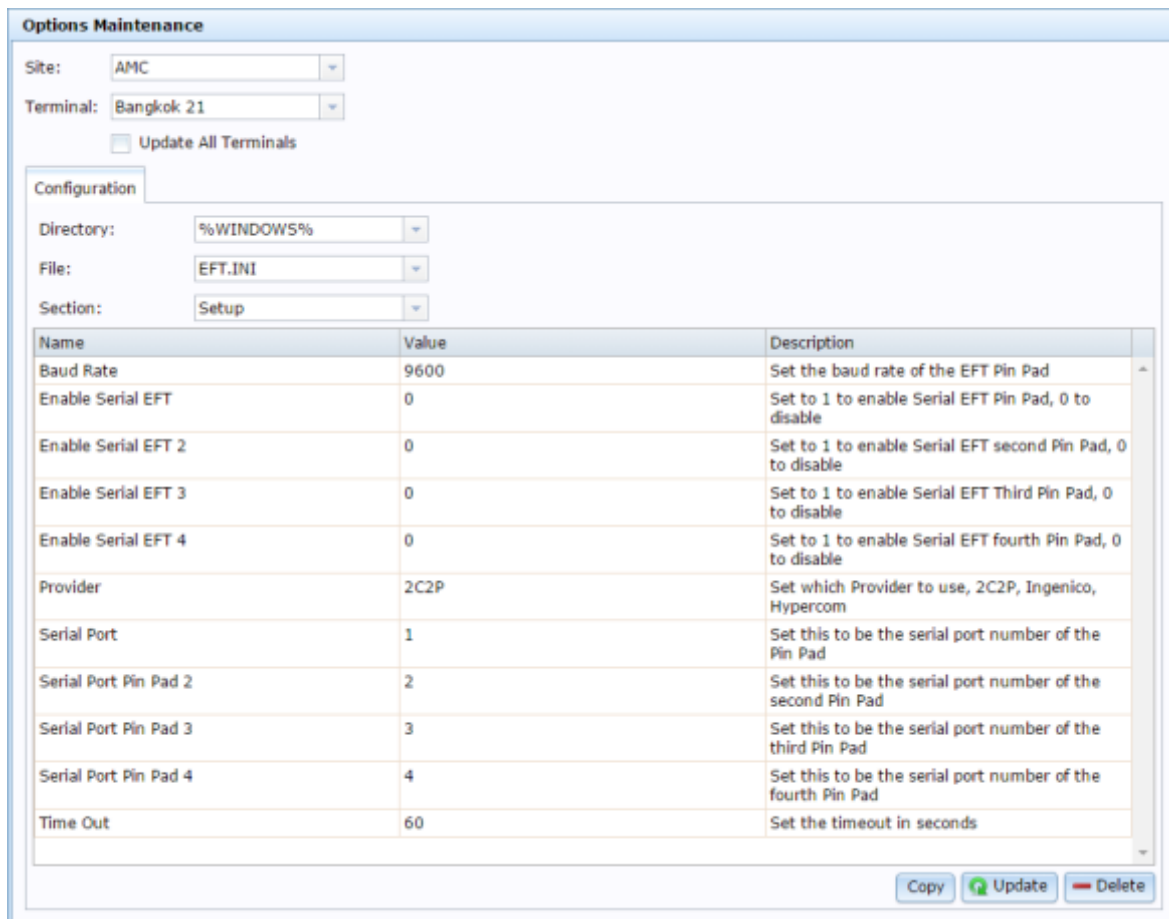
Use this area to configure the operations of your EFTPOS machines.

Opening this area:

To open this area:

1. Select %WINDOWS% in the Directory drop-down field.
2. Select EFT.INI in the File drop-down field.

The area is displayed.



The screenshot shows the 'Options Maintenance' window. At the top, there are dropdown menus for 'Site' (AMC) and 'Terminal' (Bangkok 21), and a checkbox for 'Update All Terminals'. Below this is a 'Configuration' section with three dropdown menus: 'Directory' (set to %WINDOWS%), 'File' (set to EFT.INI), and 'Section' (set to Setup). The main part of the window is a table with three columns: Name, Value, and Description. The table contains the following data:

Name	Value	Description
Baud Rate	9600	Set the baud rate of the EFT Pin Pad
Enable Serial EFT	0	Set to 1 to enable Serial EFT Pin Pad, 0 to disable
Enable Serial EFT 2	0	Set to 1 to enable Serial EFT second Pin Pad, 0 to disable
Enable Serial EFT 3	0	Set to 1 to enable Serial EFT Third Pin Pad, 0 to disable
Enable Serial EFT 4	0	Set to 1 to enable Serial EFT fourth Pin Pad, 0 to disable
Provider	2C2P	Set which Provider to use, 2C2P, Ingenico, Hypercom
Serial Port	1	Set this to be the serial port number of the Pin Pad
Serial Port Pin Pad 2	2	Set this to be the serial port number of the second Pin Pad
Serial Port Pin Pad 3	3	Set this to be the serial port number of the third Pin Pad
Serial Port Pin Pad 4	4	Set this to be the serial port number of the fourth Pin Pad
Time Out	60	Set the timeout in seconds

At the bottom right of the window, there are three buttons: 'Copy', 'Update', and 'Delete'.

Field

Description

Baud Rate

Type the baud rate of the EFTPOS pin pad.

Field	Description
Enable Serial EFT / Enable Serial EFT 2-4	Type 1 to enable the serial-port connected EFTPOS machine, or 0 to disable it.
Provider	Type the name of your EFTPOS provider: <ul style="list-style-type: none"> ▪ 2C2P. ▪ Ingenico. ▪ Hypercom.
Serial Port / Serial Port Pin Pad 2-4	Type the serial port number to use for this pin pad, if using a serial-port connected EFTPOS machine.
Tine Out	Type the number of seconds of inactivity before the EFTPOS machine times out.

Terminal configuration area

Use this area to configure the operations of your terminals.

Opening this area:

To open this area:

1. Select **%WINDOWS%** in the **Directory** drop-down field.
2. Select **PPCONFIG.INI** in the **File** drop-down field.

The area is displayed.

Options Maintenance

Site:

Terminal:

Update All Terminals

Configuration

Directory:

File:

Section:

Name	Value	Description
Centre Headers and Footers	1	Set to 1 to enable, 0 to disable
Company Banner Name	Site FLC	
Currency Decimals	2	
Currency Symbol	\$	
Enable Double Change	1	Set to 1 to enable the change to be double height
Enable Double Tender	0	Set to 1 to enable the Tender to be double height
FooterLine1	Thank you for shopping at AMC's	
FooterLine10	Line 10	
FooterLine11	BLANK	
FooterLine12	BLANK	
FooterLine13	BLANK	
FooterLine14	BLANK	
FooterLine15	BLANK	
FooterLine16	BLANK	
FooterLine2	Please retain your receipt	
FooterLine3	as proof of purchase	
FooterLine4	BLANK	

Copy Update Delete

Field

Description

Centre Headers and Footers

Type **1** to print headers and footers as centred on the receipt. Type **0** to left-align the headers and footers.

Company Banner Name

Type the name to print as the company banner.

Currency Decimals

Type the number of decimal points to use in the currency.

Currency Symbol

Type the symbol to use when representing the currency.

Field	Description
Enable Double Change	Type 1 to print change amount in double-height text, or 0 to print it in normal text.
Enable Double Tender	Type 1 to print tender amount in double-height text, or 0 to print it in normal text.
Footer Line 1-16	Type the text you want to appear at the bottom of the receipt, one line each. Text is displayed in numerical order. That is, FooterLine1 is displayed, then FooterLine 2, etc.
HeaderLine 1-8	Type the text you want to appear at the top of the receipt, one line each. Text is displayed in numerical order. That is,HeaderLine1 is displayed, then HeaderLine 2, etc.
Journal Description	Type the descriptive text to be used when printing journal numbers.
Length of Mask	<p>Type the number of digits to display when concealing credit card numbers.</p> <div data-bbox="483 1323 1394 1458" style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px;"> <p>Note: This does not affect the number of digits concealed, only the number of "hidden" digits, such as asterisks displayed.</p> </div>
Mask Credit Card Details on Receipt	Type 1 to conceal the credit card number and information used on the receipt, or 0 to not conceal it.
Numbers Before Mask	<p>Type the number of digits of a credit card to display before concealing the remainder. The digits displayed are the last digits of the card.</p> <p>For example, if you type 4, the last four digits of the credit card number are displayed.</p>

Field	Description
Operator Served Text	Type the text to display for the name of the person who processed the transaction. <div data-bbox="480 454 1396 548" style="border: 1px solid #f4a460; padding: 5px; margin-top: 10px;"> Tip: Use %s to stand in for the operator's first name. </div>
Print Amount for Free Items on Receipt	Type 1 to print the normal sales price of free items on the receipt, or 0 to not display the price.
Print Bottom Logo On Receipt	Type 1 to print a logo on the bottom of the receipt, or 0 to not print the logo.
Print Change	Type: <ul style="list-style-type: none"> ▪ 2 to only print change on the receipt if the change is not zero. ▪ 1 to always print the change required on the receipt ▪ 0 to never print the change on the receipt.
Print Credit Card details on Receipt	Type 1 to print the credit card details on the receipt, or 0 to not print them. <div data-bbox="480 1346 1396 1473" style="border: 1px solid #8eb9e2; padding: 5px; margin-top: 10px;"> Note: This controls whether card details are printed at all, not whether the digits are concealed. </div>
Print Free Items on Receipt	Type 1 to print free items on the receipt, or 0 to not print them.
Print Full Description	Type 1 to print an item's full description on the receipt, or 0 to print just the POS Description.

Field	Description
Print Item Numbers on Receipt	Type 1 to print item codes on the receipt, or 0 to not print them.
Print Journal Barcode	Type 1 to print the journal number on the receipt, or 0 to not print it.
Print Login Name on Receipt	Type 1 to print the operator's login name on the receipt, or 0 to not print it.
Print NOT RECEIPT on Bill	Type 1 to print NOT RECEIPT on the receipt when the receipt is a table bill, not a finalised transaction, or 0 to not print it.
Print On Demand	Type 1 to print the receipt only when the operator requests one, or 0 to print a receipt by default for each transaction.
Print Operator in Bold on Receipt	Type 1 to print the operator's name in bold font on the receipt, or 0 to print it in normal font.
Print Served By on Receipt	Type 1 to print the Operator Served Text on the receipt, or 0 to not print it.
Print TAX	Type: <ul style="list-style-type: none"> ▪ 2 to only print the VAT/GST on the receipt if the tax amount is not zero. ▪ 1 to always print the VAT/GST required on the receipt. ▪ 0 to never print the VAT/GST on the receipt.
Print Tax Ex Values on Receipt	Type 1 to print sales prices exclusive of tax on the receipt, or 0 to include tax in sales prices.

Field	Description
Print Top Logo on Receipt	Type 1 to print a logo on top of the receipt, or 0 to not print it.
Print Voids	Type 1 to print items that were voided during the transaction on the receipt, or 0 to not print them.
Strip Blank Lines	Type 1 to remove blank lines from the receipt, or 0 to not remove them.

Kitchen printer area

Use this area to configure the operations of kitchen printers used by your Point of Sale.

Opening this area:

To open this area:

1. Select **%WINDOWS%** in the **Directory** drop-down field.
2. Select **PPKITCHENPRINTER.INI** in the **File** drop-down field.
3. Select which printer you want to view in the **Section** drop-down field.

The area is displayed.

Note: The number of printers available in the **Section** drop-down field is based on the **Kitchen Printers** value in the Basestation initialisation area.

Options Maintenance

Site:

Terminal:

Update All Terminals

Configuration

Directory:

File:

Section:

Name	Value	Description
Centre Modifiers	1	Set to 1 to Centre the modifier, 0 to disable
Characters Per Line	41	Set to the width of the receipt roll as a character count
Code Page	0	Set to code page required for Printer (US 0) (AUS 0) (Thal-Epson 20,21,26) (Thal-Star 21) (Thai-Star UTF8 128)
Convert to TIS620	0	Set to 1 to convert UTF-8 to TIS620 when using Thai character set
Duplicate	0	Set to 1 to duplicate any thing sent to this printer, 0 to disable
Enable Double	1	Set to 1 to Allow Double Height printing, 0 to disable
Enable Kitchen Docket Number	1	Set to 1 to enable Kitchen Docket number print, 0 to disable
Enable Printer	1	Set to 1 to enable Printer, 0 to disable
Extra Lines Before Cut	5	the number of lines added to the kitchen docket before the paper cut
Fallover Printer	0	Set the printer number for the auto fall over on printer error. To disable set this to the same printer
Font	A	Set to Font Size (A - Normal 10, B - small 15, C - All double Height)

Copy Update Delete

Field

Description

Centre Modifiers Type 1 to use centre alignment for item modifiers, or 0 to use left alignment.

Characters Per Line Type the number of characters that fit across the width of the receipt roll.

Code Page Type the number corresponding to the type of your printer.

Convert to TIS620 Type 1 to convert the UTF-8 characters to TIS620 Thai character set, or 0 to not convert.

Field	Description
Duplicate	Type 1 to duplicate anything sent to this printer, or 0 to not duplicate.
Enable Double	Type 1 to allow double-height printing on this printer, or 0 to not disable it.
Enable Kitchen Docket Number	Type 1 to print the kitchen docket number, or 0 to not print it.
Enable Printer	Type 1 to enable this printer, or 0 to disable it.
Extra Lines Before Cut	Type the number of empty lines to print at the end of the receipt before cutting, to make space for a docket-holder.
Fallover Printer	Type the number of the printer that print jobs should go to if this printer has an error.
Font	Type the letter corresponding to the font size to use: <ul style="list-style-type: none"> ▪ A - normal font. ▪ B - small font. ▪ C - double-height font.
Printer Baud	Type the baud rate of the printer.
Printer Host	Type the internal IP address of the printer in your network.
Printer Host Port	Type the port used by the printer.

Field	Description
Printer Mapping	If you want to map a "logical" printer (a printer that exists in the network, but is not a physical printer) to this physical printer, type the printer number of the logical printer to map. Multiple numbers should be separated by commas, for example 1,2,3 to map the logical printers 1, 2 and 3 to this printer.
Printer Port	The port to use when using a serial printer as the kitchen printer.
Printer Type	Type the brand of kitchen printer. The Portal system supports either Epson or Star printers.
Refund Bump Kitchen Docket Number	Type 1 to increase the docket number of the kitchen printer when a docket is reprinted, or 0 to not increase the number.
Top Blank Lines	Type the number of empty lines to add to the top of the receipt before printing to make room for docket holders.
Use IP Sockets	Type 1 to use IP Sockets if the printer is being used over the network, or 0 to use streams.
Use Serial Printer	Type 1 to use this printer as a serial printer directly connected via a serial port, or 0 to use it as an IP printer over the network.

Label printer area

Use this area to configure the operations label printers used by your Point of Sale.

Opening this area:

To open this area:

1. Select %WINDOWS% in the **Directory** drop-down field.
2. Select PPLABELPRINTER.INI in the **File** drop-down field.

The area is displayed.

Options Maintenance

Site:

Terminal:

Update All Terminals

Configuration

Directory:

File:

Section:

Name	Value	Description
Accreditation	ABC	Set the sext for the accreditation number to be printed on the label
Customer Address	Address	Set the customer Address to be printed
Customer Name	Customer	Set the customer name to be printed
Enable Printer	1	Set to 1 to enable printer, or 0 to disable
Font	A	Set to Font Size (A - Normal 10, B - small 15, C - All double Height)
Printer Baud	9600	Set the baud rate when using a serial printer
Printer Host		Set this to be the IP address of the Printer if using a network printer
Printer Host Port	9100	Set this to be the Port used with the IP address of the Printer if using a network printer, Use 8101-8105 for Windows printers
Printer Port	3	Set this to be the serial port number of the printer if using a serial printer
Use IP Sockets	0	Set this to be 1 to use Sockets for Network Printers, set to 0 to use streams. Note older printers may not support sockets
Use JetDirect	0	Set this to be 1 to use JetDirect for Network Printers, set to 0 to use streams, Very old printers do not support sockets or JetDirect

Copy Update Delete

Field

Description

Accreditation Type the text to display before the accreditation number printed on the label.

Customer Address Type the customer address to be printed.

Customer Name Type the customer name to be printed

Enable Printer Type 1 to enable this printer, or 0 to disable it.

Field	Description
Font	Type the letter corresponding to the font size to use: <ul style="list-style-type: none"> ▪ A - normal font. ▪ B - small font. ▪ C - double-height font.
Printer Baud	Type the baud rate of the printer.
Printer Host	Type the internal IP address of the printer in your network.
Printer Host Port	Type the port used by the printer.
Printer Port	The port to use when using a serial printer as the label printer.
Use IP Sockets	Type 1 to use IP Sockets if the printer is being used over the network, or 0 to use streams.
Use Jet Direct	Type 1 to use Jet Direct if the printer is being used over the network, or 0 to use streams.
Use Serial Printer	Type 1 to use this printer as a serial printer directly connected via a serial port, or 0 to use it as an IP printer over the network.

Serial printer area

Use this area to configure the operations of serial (office-type) printers used by your Point of Sale.

Opening this area:

To open this area:

1. Select **%WINDOWS%** in the **Directory** drop-down field.
2. Select **PPSERIALPRINTER.INI** in the **File** drop-down field.

The area is displayed.

The screenshot shows the 'Options Maintenance' window with the following configuration details:

- Site: AMC
- Terminal: Bangkok 21
- Update All Terminals
- Configuration Tab:
 - Directory: %WINDOWS%
 - File: PPSERIALPRINTER.INI
 - Section: Setup

Name	Value	Description
Characters Per Line	41	Set to the width of the receipt roll as a character count
Code Page	0	Set to code page required for Printer (US 0) (AUS 0) (Thal-Epson 20,21,26) (Thal-Star 21) (Thai-Star UTF8 128)
Convert to TIS620	0	Set to 1 to convert UTF-8 to TIS620 when using Thai character set
Enable Double	1	Set to 1 to enable double height and Width printing
Enable Printer	1	Set to 1 to enable printer, or 0 to disable
Extra Lines Before Cut	5	the number of lines added to the receipt before the paper cut
Font	A	Set to Font Size (A - Normal 10, B - small 15)
Printer Baud	9600	Set the baud rate when using a serial printer
Printer Host	10.33.120.38	Set this to be the IP address of the Printer if using a network printer
Printer Host Port	9100	Set this to be the Port used with the IP address of the Printer if using a network printer, Use 8101-8105 for Windows printers
Printer Port	1	Set this to be the serial port number of the printer if using a serial printer

Buttons: Copy, Update, Delete

Field	Description
Characters Per Line	Type the number of characters that fit across the width of the receipt roll.
Code Page	Type the number corresponding to the type of your printer.
Convert to TIS620	Type 1 to convert the UTF-8 characters to TIS620 Thai character set, or 0 to not convert.
Enable Double	Type 1 to allow double-height printing on this printer, or 0 to not disable it.

Field	Description
Enable Printer	Type 1 to enable this printer, or 0 to disable it.
Extra Lines Before Cut	Type the number of empty lines to print at the end of the receipt before cutting, to make space for a docket-holder.
Font	Type the letter corresponding to the font size to use: <ul style="list-style-type: none"> ▪ A - normal font. ▪ B - small font. ▪ C - double-height font.
Printer Baud	Type the baud rate of the printer.
Printer Host	Type the internal IP address of the printer in your network.
Printer Host Port	Type the port used by the printer.
Printer Port	The port to use when using a serial printer.
Printer Type	Type the brand of printer. The Portal system supports either Epson or Star printers.
Use IP Sockets	Type 1 to use IP Sockets if the printer is being used over the network, or 0 to use streams.
Use Serial Printer	Type 1 to use this printer as a serial printer directly connected via a serial port, or 0 to use it as an IP printer over the network.

A4 vouchers area

Use this area to configure the printing of A4 or letter-sized vouchers.

Opening this area:

To open this area:

1. Select **%WINDOWS%** in the **Directory** drop-down field.
2. Select **PPVOUCHERS.INI** in the **File** drop-down field.
3. Select **A4** in the **Section** drop-down field.

The area is displayed.

The screenshot shows the 'Options Maintenance' window. At the top, there are dropdown menus for 'Site' (AMC) and 'Terminal' (Bangkok 21), and an unchecked checkbox for 'Update All Terminals'. Below this is a 'Configuration' section with three dropdown menus: 'Directory' (set to %WINDOWS%), 'File' (set to PPVOUCHERS.INI), and 'Section' (set to A4). The main part of the window is a table with three columns: 'Name', 'Value', and 'Description'. The table contains several rows of configuration options, with 'A4 Logo' having a value of 'C:\PosPortal\Documents\FACTORY.BMP'. At the bottom right of the window are three buttons: 'Copy', 'Update', and 'Delete'.

Name	Value	Description
A4 Logo	C:\PosPortal\Documents\FACTORY.BMP	
Address1		
Address2		
Company Name		
Conditions	This is a conditions line	
Email	Email: bob@systraq.com	set as the Voucher Email
Enable	0	
Form	1	
Instructions	Please deposit all monies into my account	
Number Of Copies	1	
Phone		
Postcode		
Printer		
Site Name	This is a site name	
State		
Suburb		
Use Default Printer	1	
Use Original	0	

Field

Description

A4 Logo

Type the file location of the company logo to use on vouchers.

Address 1

Type the first line of your company address to print on vouchers.

Address 2

Type the second line of your company address to print on vouchers.

Field	Description
Company Name	Type the name of your company to print on vouchers.
Conditions	Type the terms and conditions to print on vouchers.
Email	Type the public email address of your company to print on vouchers.
Enable	Type 1 to enable the A4 page printing.
Form	The form to be used with printing.
Instructions	Type the instructions to print on vouchers.
Number of Copies	Type the number of copies of a voucher to print.
Phone	Type the company phone number to print on vouchers.
Postcode	Type the company post code to print on vouchers.
Printer	Type the USB printer name.
Site Name	Type the name of the site to print on vouchers.
State	Type the state the company resides in to print on vouchers.
Suburb	Type the company's suburb to print on vouchers.

Field	Description
Use Default Printer	Type 1 to use the default windows printer to print vouchers.
Use Original	This field should always be set to 0.
VAT ID	Type the company's government tax number to print on vouchers.
WEB	Type the company's website address to print on vouchers.

Voucher documents area

Use this area to configure where information is accessed for printing vouchers.

Opening this area:

To open this area:

1. Select %WINDOWS% in the **Directory** drop-down field.
2. Select PPVOUCHERS.INI in the **File** drop-down field.
3. Select **Documents** in the **Section** drop-down field.

The area is displayed.

Options Maintenance

Site:

Terminal:

Update All Terminals

Configuration

Directory:

File:

Section:

Name	Value	Description
A4 Logo	C:\PosPortal\Documents\FACTORY.BMP	
Cooking Directory	c:\PosPortal\Documents\Cooking	
Directory	c:\PosPortal\Documents	
File Mask	*.txt	
Item Info Directory	c:\PosPortal\Documents\ItemInfo	
Item Info File Mask	.info	
Item Not For Sale	c:\PosPortal\Documents\NotAllowedMessage.as	
Item Promo File Mask	.Promo	
Recipe Directory	c:\PosPortal\Documents\Recipes	
Tipping Teams Directory	c:\PosPortal\Documents\Teams	

Copy Update Delete

Field

Description

A4 Logo

Type the file location of the company logo to use on labels.

Cooking Directory

Type the location of this directory.

Note: These directories are based on the directories used for phone app data. Your directory names may be different. See *Managing phone apps*.

Directory

Type the location of this directory.

Note: These directories are based on the directories used for phone app data. Your directory names may be different. See *Managing phone apps*.

File Mask

Type the extension to use when looking for related files. For example, .txt.

Field	Description
Item Info Directory	Type the location of this directory. Note: These directories are based on the directories used for phone app data. Your directory names may be different. See <i>Managing phone apps</i> .
Item Info File Mask	Type the extension to use when looking for related files. For example, .txt.
Item Not For Sale	Type the information to display to the operator when they attempt to sell an item that has been marked as not for sale.
Item Promo File Mask	Type the extension to use when looking for related files. For example, .txt.
Recipe Directory	Type the location of this directory. Note: These directories are based on the directories used for phone app data. Your directory names may be different. See <i>Managing phone apps</i> .
Tipping Teams Directory	Type the location of this directory. Note: These directories are based on the directories used for phone app data. Your directory names may be different. See <i>Managing phone apps</i> .

Promotion vouchers area

Use this area to configure the printing properties of promotional vouchers printed from your terminals.

Opening this area:

To open this area:

1. Select %WINDOWS% in the Directory drop-down field.
2. Select PPVOUCHERS.INI in the File drop-down field.
3. Select Promotion in the Section drop-down field.

The area is displayed.

Options Maintenance

Site: AMC

Terminal: Bangkok 21

Update All Terminals

Configuration

Directory: %WINDOWS%

File: PPVOUCHERS.INI

Section: Promotion

Name	Value	Description
Footer Promotion	c:\PosPortal\Documents\FooterPromotion.asc	
Header Promotion	c:\PosPortal\Documents\HeaderPromotion.asc	
Table Promotion	c:\PosPortal\Documents\TablePromotion.asc	

Copy Update Delete

Field

Description

Footer Promotion The location of the file for promotion footers.

Header Promotion The location of the file for promotion footers.

Table Promotion The location of the file that contains the promotion to print on table bills.

Voucher area

Use this area to configure the default values for 12 different vouchers printed from the terminals, and how the vouchers are triggered.

Opening this area:

To open this area:

1. Select %WINDOWS% in the Directory drop-down field.
2. Select PPVOUCHERS.INI in the File drop-down field.

3. Select **Voucher** in the **Section** drop-down field.

The area is displayed.

The screenshot shows the 'Options Maintenance' window with the following configuration:

- Site: AMC
- Terminal: Bangkok 21
- Update All Terminals
- Configuration:
 - Directory: %WINDOWS%
 - File: PPVOUCHERS.INI
 - Section: Voucher

Name	Value	Description
Allow Change	1	
Amount1	0	
Amount10	0	
Amount2	0	
Amount3	0	
Amount4	0	
Amount5	0	
Amount6	0	
Amount7	0	
Amount8	0	
Amount9	0	
Barcode Leader4	2	
Dept Voucher	c:\PosPortal\Documents\DeptVoucher.asc	
ExpireDays1	30	
ExpireDays10	30	
ExpireDays2	30	
ExpireDays3	30	
ExpireDays4	30	

Buttons: Copy, Update, Delete

Field	Description
Allow Change	This field is no longer in use.
Amount	Type the amount of the voucher for each voucher labelled 1 to 10.
Barcode Leader4	The lead characters printed when a voucher is created.
Dept Voucher	Type the file name location for the department voucher.

Field	Description
ExpireDays	Type the number of days from the day of issue for each voucher labelled 1 to 10.
File	Type the file name containing the voucher details for each voucher labelled 1 to 10.
Supplier Rebate	Type the file name containing the voucher for the supplier rebate.
Supplier Voucher	Type the file name containing the supplier voucher.
TriggerAmount	Type the sales amount that triggers each voucher labelled 1 to 10.

Discount area

Use this area to view configured discounts for terminals.

Note: It is strongly recommended to only edit discounts using the Discount Maintenance screen, as this offers much more control. See *Discount Maintenance screen*.

Opening this area:

To open this area:

1. Select %DATA% in the Directory drop-down field.
2. Select DISC.INI in the File drop-down field.

The area is displayed.

Options Maintenance

Site:

Terminal:

Update All Terminals

Configuration

Directory:

File:

Section:

Name	Value	Description
COUNT	98	
Discount0	Test 10%:10%	
Discount2	15 Percent Discount (15%):15%	
Discount3	30 Percent Discount (30%):30%	
Discount4	SENIOR CITIZEN Discount (20%):20%	
Discount5	Person With Disability (20%):20%	
Discount6	Open:00	
Discount7	Bob:5%	

Copy Update Delete

Field

Description

Name Unique name identifying the discount.

Value Control string for the discount's description, type and amount.

Description Description of the discount for your purposes.

Configuring inventory and procurement for your site

You can configure the way the Portal procurement operates to best suit your site's processes, including specifying whether a site can purchase items from external creditors, or only from the company's central warehouse.

See *Configuring supplier types for your sites* on page 214.

Also see *Configuring inventory and procurement for your company*.

Configure the site-specific settings for each site within your company, such as:

- Default pricing and price update delays in your inventory.
See *Configuring inventory options for your site* on page 118.
- Credit limits and workflow of purchase orders.
See *Configuring purchase order options for your site* on page 141.
- How and where stock may be receipt from.
See *Configuring stock receipting options for your site* on page 144.
- How stock returns are processed.
See *Configuring stock returns for your site* on page 152.
- How stock take works.
See *Configuring stock take for your site* on page 166.
- Filenames and price periods for label printing
See *Configuring labels for your site* on page 120.
- How item packs operate.
See *Configuring packs for your site* on page 135.
- Table surcharges, bill splitting and other table service settings, if required.
See *Configuring table service for your site* on page 169.
- How and when costs are calculated in stock receipts.
See *Configuring costs for your site* on page 95.
- How creditor contracts operate for your site.
See *Configuring creditor contracts for your site* on page 98.
- How PDT sales operate for your site.

See *Configuring PDT sales for your site* on page 138.

- The site's Metcash settings.

See *Configuring Metcash for your site* on page 127.

- How micro loans work.

See *Configuring micro loans for your site* on page 130.

Configuring supplier types for your sites

The Portal permits two different supplier types:

- Warehouse suppliers, where a supplier represents the central warehouse of your company that sites order and receive from.
- Direct supply from debtors (DSD), where a supplier is a separate company that a site is ordering from directly.

Both types of suppliers use a creditor configured in your Portal, and operate in the same way. You can configure the Portal to treat them differently:

- Some operations may be allowed for one type of supplier, but not for the other.
- DSD suppliers may be disabled for sites altogether, so all sites must order from the company warehouse.

You can configure:

- Whether DSD suppliers are available for your company.

See the [Hide DSD Flag](#) field in *Configuring creditors for your company*.

- Which supplier each site should use as the warehouse supplier.

See the [Default Warehouse](#) field in *Configuring purchase order options for your site* on page 141.

Note: This is configured per-site, not company-wide.

- Whether sites can edit the item costs for DSD or Warehouse suppliers.

See the [DSD - Allow Cost](#) and [Warehouse - Allow Cost](#) fields in *Configuring purchase order options for your site* on page 141.

Note: This is configured per-site, not company-wide.

- How stock should be receipted from DSD and Warehouse suppliers, including handling back orders, default receipt types, item cost editing and receiving items that were not ordered.

See *Configuring stock receipting options for your site* on page 144.

Note: This is configured per-site, not company-wide.

- How stock should be returned to DSD and Warehouse suppliers, including returning non-active items, and updating creditor totals.

See *Configuring stock returns for your site* on page 152.

Note: This is configured per-site, not company-wide.

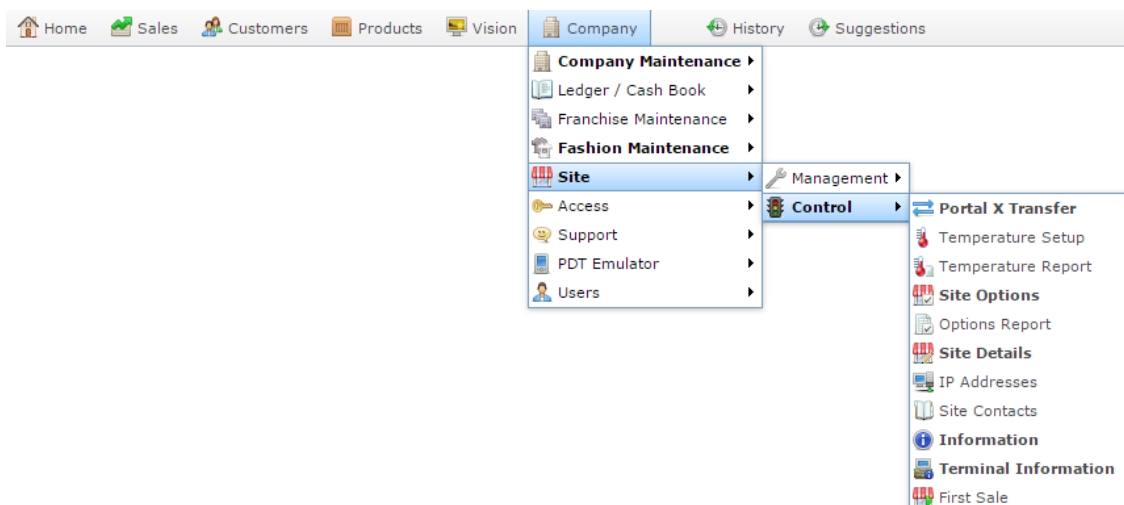
Checking pending site updates

You can check pending site updates to see if an update you have recently made has been pushed through to your Point of Sale. For example, a price change to an item. This is useful for troubleshooting why a change has not appeared at your Point of Sale.

Note: If there are a lot of updates pending, it may take some time for them to transmit to the site. If you think your update has not been transmitted, you can force the update. See *Refreshing site information* on page 36.

To check for pending site updates:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > First Sale**.



The Sites Trading Details report is displayed.

Sites Details

Name	Site	Company	Type	Location	Terminal	PDTs	Pending Portal->Site	Pending Portal->Portal	Pending Portal->Terminal
AMC	1	AMC Master	Wholesale	Not Enabled	44	8	0	0	1474
Apple Demo	300	Apple Store	Retail	Not Enabled	8	1	0	0	5
Australia	501	DKSH	Retail	Not Enabled	0	0	0	0	0

3. Check the **Pending Portal -> Site** field to see how many updates are pending.

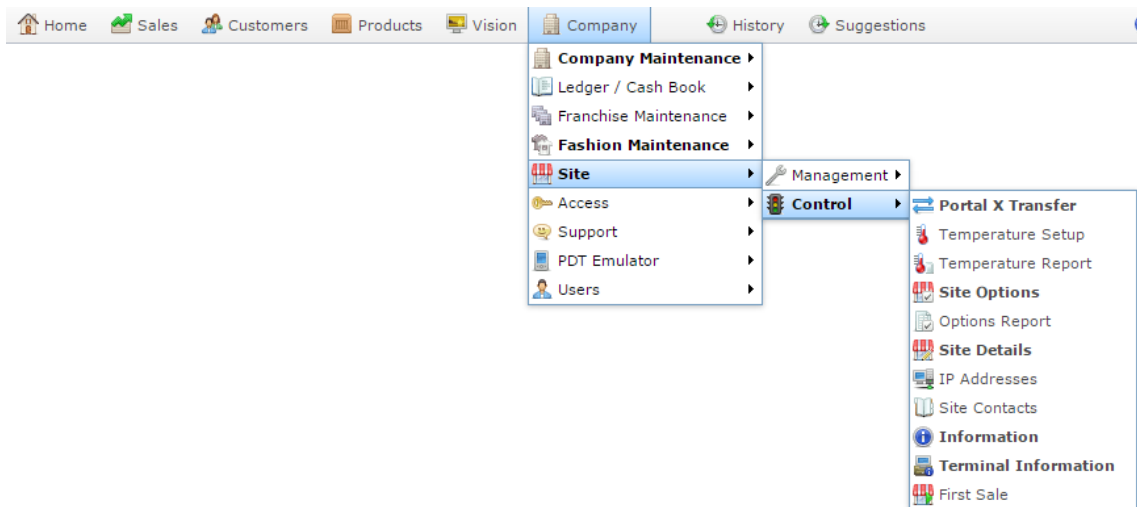
Checking pending terminal updates

You can check pending terminal updates to see if an update you have recently made has been pushed through to your terminals yet. For example, a price change to an item. This is useful for troubleshooting why a change has not appeared at your Point of Sale.

Note: If there are a lot of updates pending, it may take some time for them to transmit to the terminal. If you think your update has not been transmitted, you can force the update. See *Refreshing site information* on page 36.

To check for pending terminal updates:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > First Sale**.



The Sites Trading Details report is displayed.

Sites Details


Name	Site	Company	Type	Location	Terminal	PDTs	Pending Portal->Site	Pending Portal->Portal	Pending Portal->Terminal
AMC	1	AMC Master	Wholesa	Not Enabled	44	8	0	0	1474
Apple Demo	300	Apple Store	Retail	Not Enabled	8	1	0	0	5
Australia	501	DKSH	Retail	Not Enabled	0	0	0	0	0

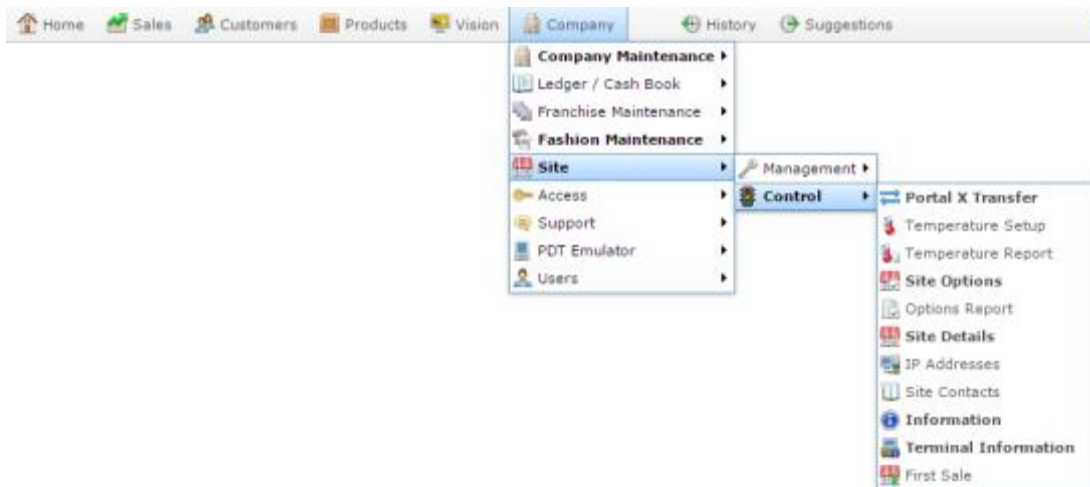
3. Check the **Pending Portal -> Terminal** field to see how many updates are pending.

Transferring data between portals

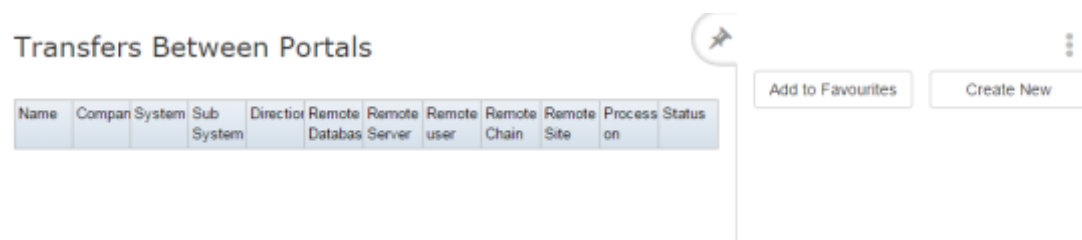
Transfer data between Portal when you want to use data from one Portal on another. For example, to transfer the frequent shopper information from one Portal to another.

To transfer data between portals:

1. Press  **Company** in the main menu bar.
2. Press **Site > Control > Portal X Transfer**.



The Transfers Between Portals report is displayed.



Press

Create New

The Database Transfer Maintenance screen is displayed.

Database Transfer Maintenance

Company: AMC Master

Site: Butcher Site 3

System: None

Section: None

Direction: Import

Remote Database:

Remote Server:

Remote User:

Remote Password:

Remote Company:

Remote Site:

Ignore Remote company: No

Enabled: No

Trigger day: Every Day

New Save

3. Select the primary company in the **Company** drop-down field.

Note: This must be a company on the current Portal.

4. Select the primary site in the **Site** drop-down field.

Database Transfer Maintenance

Company: AMC Master

Site: Butcher Site 3

System: None

Section: None

Direction: Import

Remote Database:

Remote Server:

Remote User:

Remote Password:

Remote Company:

Remote Site:

Ignore Remote company: No

Enabled: No

Trigger day: Every Day

New Save

5. Select the Portal system and sub-system you want in the **System** and **Section** drop-down fields.

Database Transfer Maintenance

Company: AMC Master

Site: Butcher Site 3

System: None

Section: None

Direction: Import

Remote Database:

Remote Server:

Remote User:

Remote Password:

Remote Company:

Remote Site:

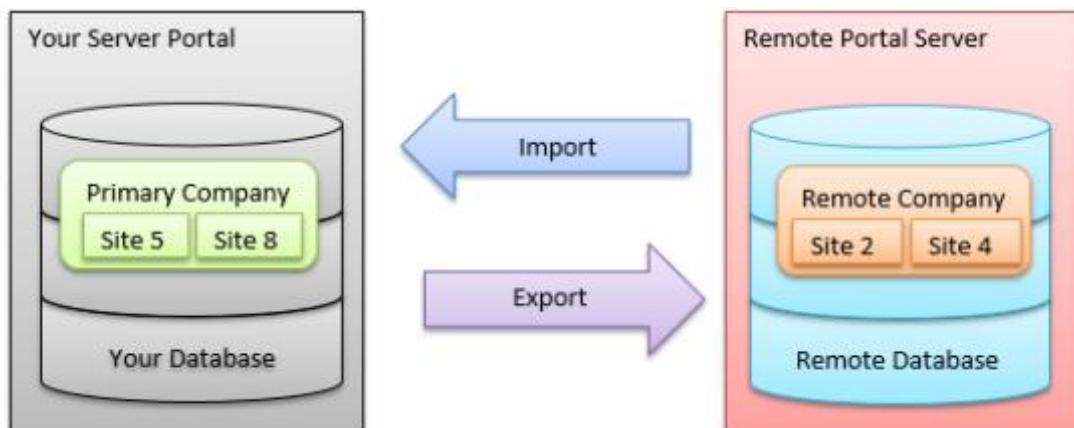
Ignore Remote company: No

Enabled: No

Trigger day: Every Day

6. Select in the **Direction** field to:

- **Import** from the remote company into the primary company.
- **Export** from the primary company to the remote company.



7. Type the name of the remote database in the **Remote Database** field.

Note: Make sure you match the spelling exactly, including upper and lower case letters.

8. Type the URL of the remote server in the **Remote Server** field.
9. If you are not authenticated on the remote server, type the user name of the user who will authenticate this transfer for you in the **Remote User** field.
10. Type the password to authenticate to the remote server in the **Remote Password** field.
11. Type the identifying code of the remote company in the **Remote Company** field.
12. Type the identifying code of the remote site in the **Remote Site** field.

Database Transfer Maintenance

Company: AMC Master

Site: Butcher Site 3

System: None

Section: None

Direction: Import

Remote Database:

Remote Server:

Remote User: Yes

Remote Password:

Remote Company:

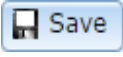
Remote Site:

Ignore Remote company: No

Enabled: No

Trigger day: Every Day

New Save

13. Select the day the transfer occurs in the **Trigger day** drop-down field.
14. Select **Yes** in the **Enabled** drop-down field.
15. Press  **Save**.


The transfer is scheduled.

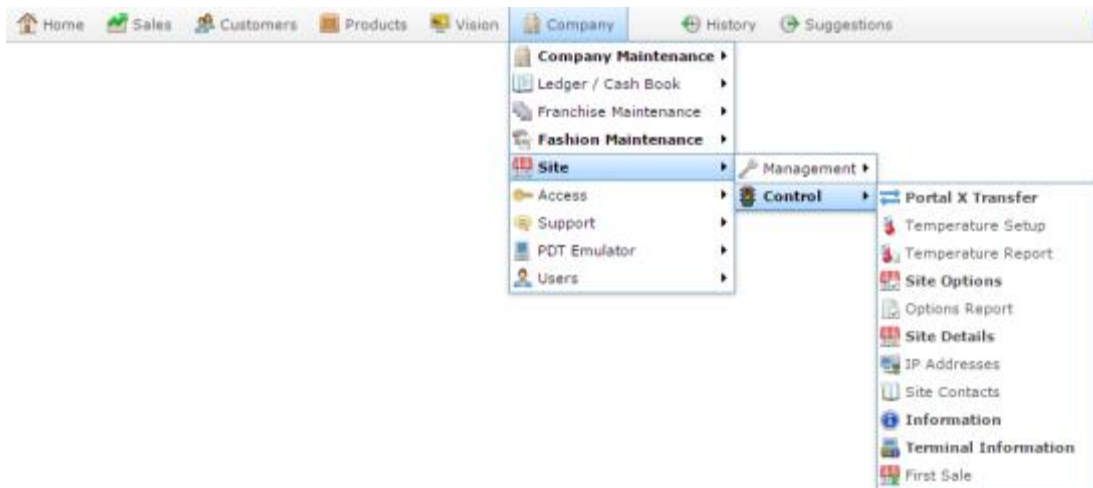
Transfers Between Portals report

Use the Transfers Between Portals report to view scheduled database transfers between Portal servers.

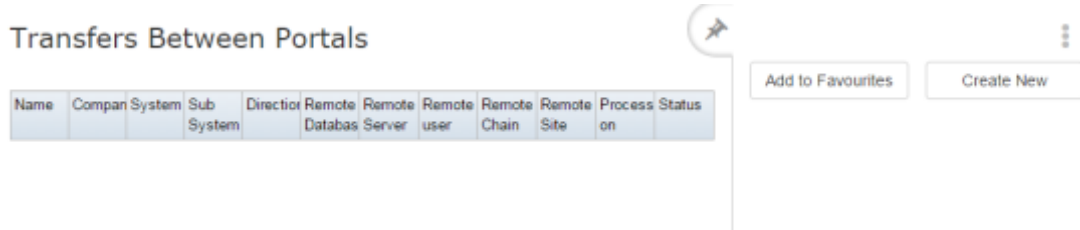
Opening the Transfers Between Portals report

To open the Transfers Between Portals report:

1. Press  **Company** in the main menu bar.
2. Press **Site > Control > Portal X Transfer**.



The Transfers Between Portals report is displayed.



Transfers Between Portals 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	Press to create a new database transfer schedule.

Report area

This area displays report information.

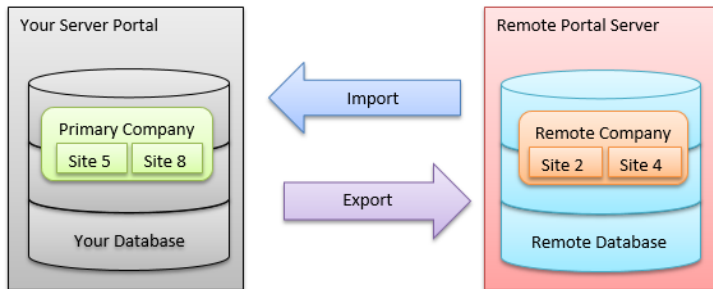
Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Name	Username who created the transfer schedule.
Company	Primary company the schedule transfers into or out of.
System	Portal system the data is sourced from or delivered to.
Sub System	Sub-system within the Portal system the data is sourced from or delivered to.
Direction	Whether the data is: <ul style="list-style-type: none">▪ Imported from the remote company to the primary company.▪ Exported from the primary company to the remote company.
Remote Database	Name of the remote database.
Remote Server	URL of the remote server.
Remote User	Name of the user used to authenticate into the remote server.
Remote Chain	Name of the remote company.

Field	Description
Remote Site	Name of the remote site.
Process on	Whether the transfer process is currently enabled.
Status	Status of the transfer: either enabled or disabled.

Database Transfer Maintenance screen


Use this window to schedule the transfer of loyalty information to or from different portals.

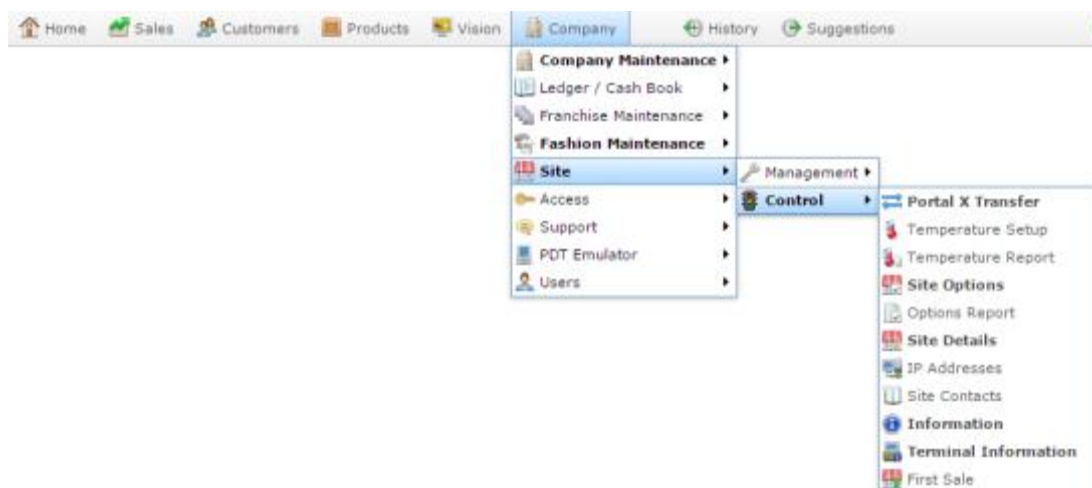


Note: You must have super-administrator privileges to use this system.

Opening the Database Transfer Maintenance screen

To open the Database Transfer Maintenance screen:

1. Press  **Company** in the main menu bar.
2. Press **Site > Control > Portal X Transfer**.



The Transfers Between Portals report is displayed.

Transfers Between Portals

Name	Compan	System	Sub	Director	Remote	Remote	Remote	Remote	Remote	Process	Status
			System		Databas	Server	user	Chain	Site	on	

Add to Favourites


Create New


3. Press .

The Database Transfer Maintenance screen is displayed.

Database Transfer Maintenance screen key fields and buttons

Field	Description
Company	Select the primary company you are working with. Note: Depending on your selection in the Direction field, you may import into or export from this company.
Site	Select the primary site you are working with.
System	Select the Portal system to import or export from.
Section	Select the area of the Portal system to import or export from.
Direction	Select whether to: <ul style="list-style-type: none"> Import from the Remote Company to the Primary Company. Export from the Primary Company to the Remote Company.


Field	Description
Remote Database	Type the name of the remote database. <div data-bbox="478 416 1394 546" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;">Note: Depending on your selection in the Direction field, you may import into or export from this database.</div>
Remote Server	Type the URL of the remote server.
Remote User	Type the user name to use to log into the remote server. <div data-bbox="478 797 1394 927" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;">Note: The username you choose must have sufficient privileges on the remote server.</div>
Remote Password	Type the password for the user to log into the remote server.
Remote Company	Type the code identifying the remote company.
Remote Site	Type the code identifying the site in the remote company you're importing or exporting from.
Ignore Remote Company	Select Yes to ignore the Remote Company setting and use the Portal's own relationship of the site to company.
Enabled	Select if this portal transfer is enabled. Enabled transfers are automatically completed on their trigger day.
Trigger day	Select which day of the week the transfer should occur, or every day.
 New	Create a new scheduled transfer.

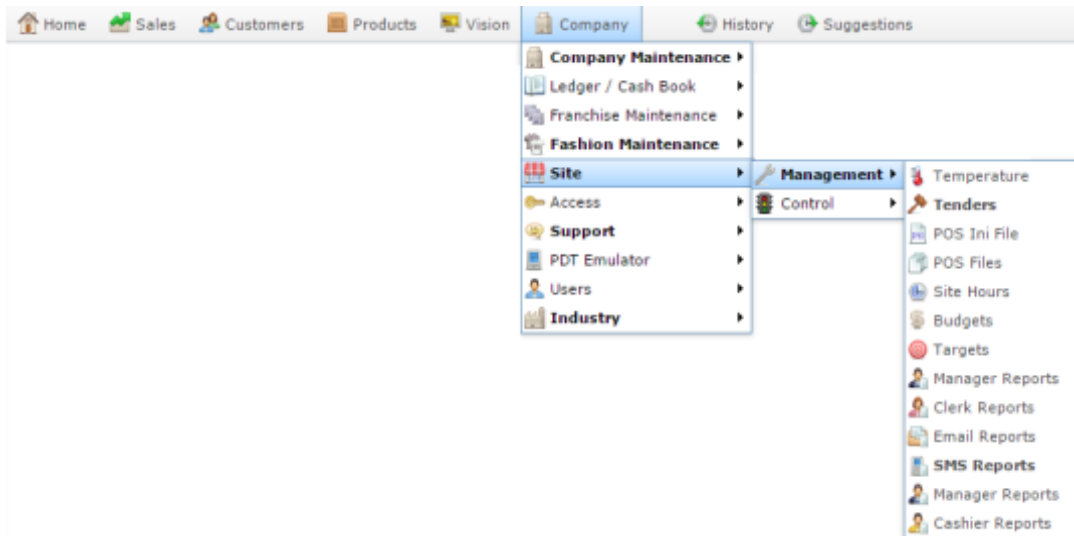
Field	Description
 Save	Save changes you've made to this transfer.

Setting store hours for the month

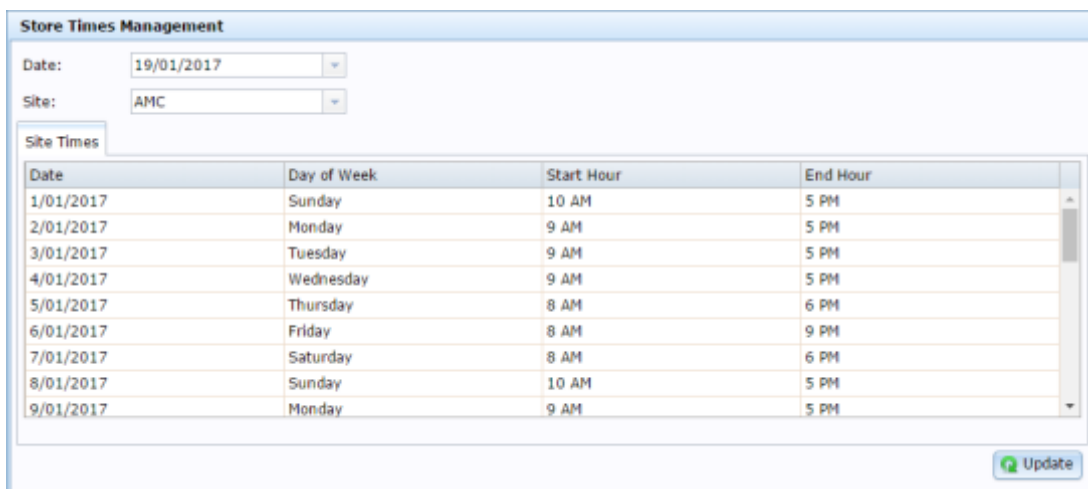
Set store hours to define when your site trading hours are for a coming month.

To set store hours:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Site Hours**.



The Store Times Management screen is displayed.



The 'Store Times Management' screen displays a date selector set to 19/01/2017 and a site selector set to AMC. Below these is a table titled 'Site Times' with columns for Date, Day of Week, Start Hour, and End Hour. The table contains data for dates from 1/01/2017 to 9/01/2017. An 'Update' button is located at the bottom right of the screen.

Date	Day of Week	Start Hour	End Hour
1/01/2017	Sunday	10 AM	5 PM
2/01/2017	Monday	9 AM	5 PM
3/01/2017	Tuesday	9 AM	5 PM
4/01/2017	Wednesday	9 AM	5 PM
5/01/2017	Thursday	8 AM	6 PM
6/01/2017	Friday	8 AM	9 PM
7/01/2017	Saturday	8 AM	6 PM
8/01/2017	Sunday	10 AM	5 PM
9/01/2017	Monday	9 AM	5 PM

3. Select the date of the month you want to set store hours for in the **Date** drop-down field.
4. Select the site you want to set store hours for in the **Site** drop-down field.
5. Select the **Start Hour** field of each date in the grid and type the hour the site starts trading.

6. Select the **End Hour** field of each date in the grid and type the hour the site stops trading.

7. Press .

The store hours are saved.


Store Times Maintenance screen

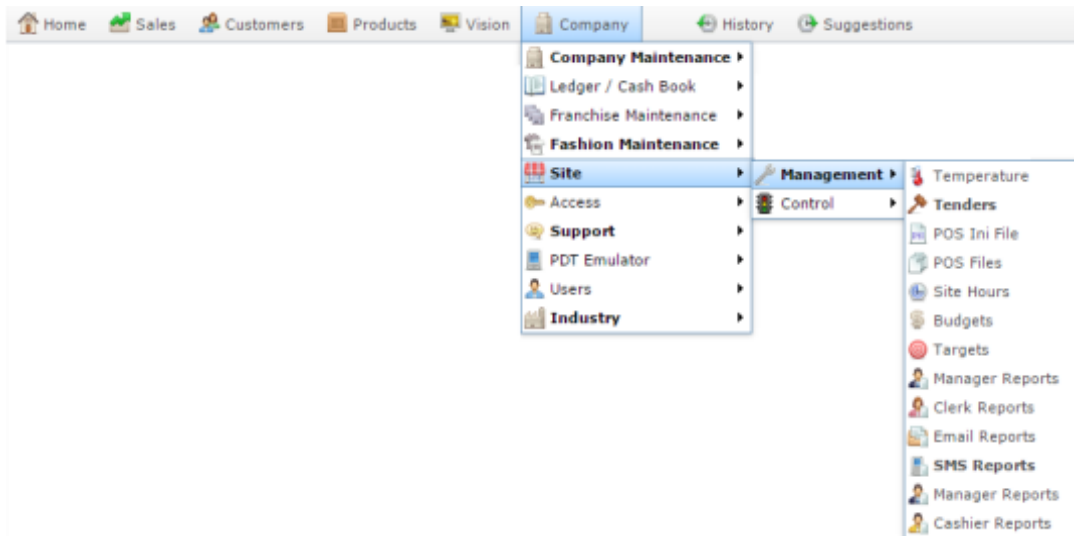
Use this screen to set the opening and closing times for each day in a month.

Note: This configuration is used by the mobile app and WEB store interfaces, but not within the Portal.

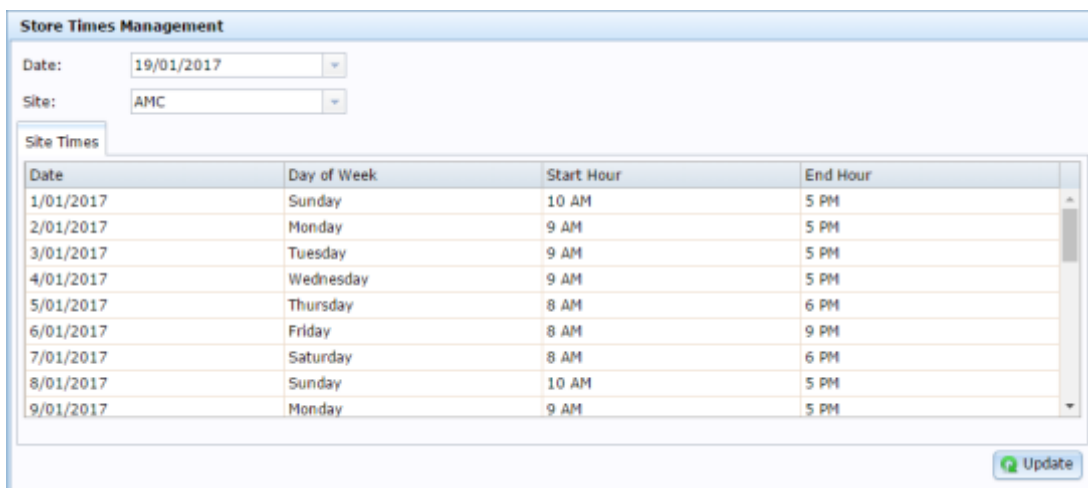
Opening the Store Times Maintenance screen

To open the Store Times Maintenance screen:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Site Hours**.



The Store Times Maintenance screen is displayed.

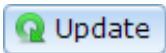


The screenshot shows the 'Store Times Management' screen. It has a 'Date' dropdown set to '19/01/2017' and a 'Site' dropdown set to 'AMC'. Below these is a 'Site Times' tab and a table with the following data:

Date	Day of Week	Start Hour	End Hour
1/01/2017	Sunday	10 AM	5 PM
2/01/2017	Monday	9 AM	5 PM
3/01/2017	Tuesday	9 AM	5 PM
4/01/2017	Wednesday	9 AM	5 PM
5/01/2017	Thursday	8 AM	6 PM
6/01/2017	Friday	8 AM	9 PM
7/01/2017	Saturday	8 AM	6 PM
8/01/2017	Sunday	10 AM	5 PM
9/01/2017	Monday	9 AM	5 PM

An 'Update' button is located at the bottom right of the screen.


Store Times Maintenance screen key fields and buttons

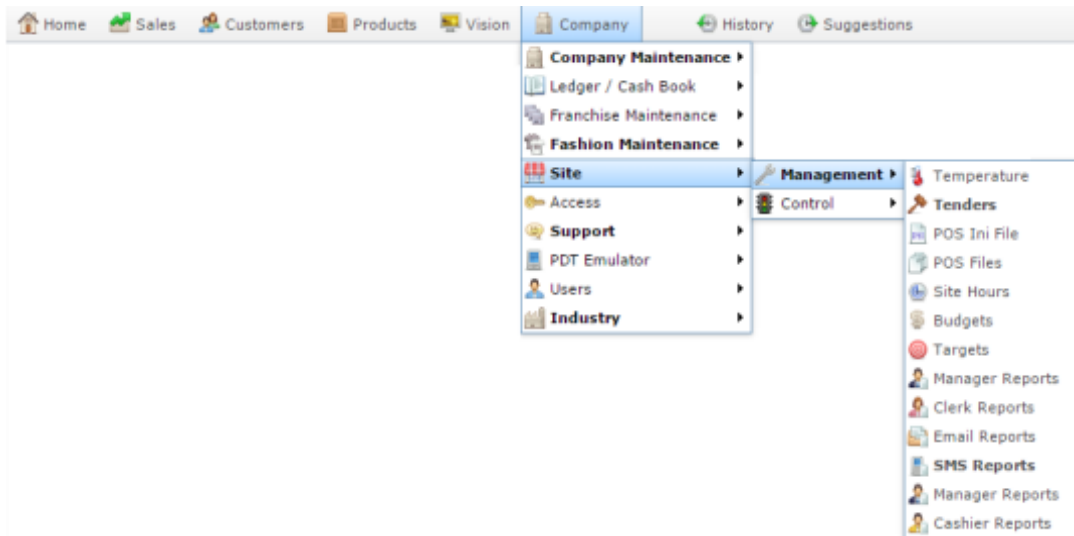
Field	Description
Date	Select the date to identify the month you want to set store times for.
Site	Select the site to set store times for.
Date	The date to set the store times for.
Day of Week	The day of the week for this date.
Start Hour	The time the store opens on this date.
End Hour	The time the store closes on this date.
	Press to save changes to your store hours.

Setting a staff budget for the month

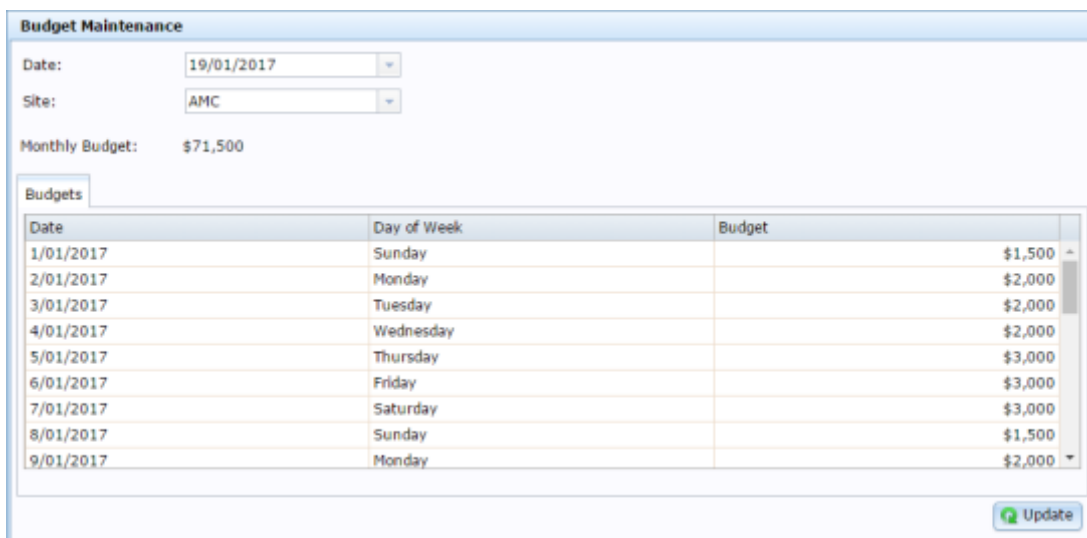
Set a staff budget to help control your staff costs when rostering staff on.

To set a staff budget:

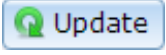
1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Budgets**.



The Budget Maintenance screen is displayed.



Date	Day of Week	Budget
1/01/2017	Sunday	\$1,500
2/01/2017	Monday	\$2,000
3/01/2017	Tuesday	\$2,000
4/01/2017	Wednesday	\$2,000
5/01/2017	Thursday	\$3,000
6/01/2017	Friday	\$3,000
7/01/2017	Saturday	\$3,000
8/01/2017	Sunday	\$1,500
9/01/2017	Monday	\$2,000

3. Select the date of the month you want to budget for in the **Date** drop-down field.
4. Select the site you want to set a budget for in the **Site** drop-down field.
5. Select the **Budget** field of each date in the grid and type the staff budget for each date.
6. Press .


The budget is saved.

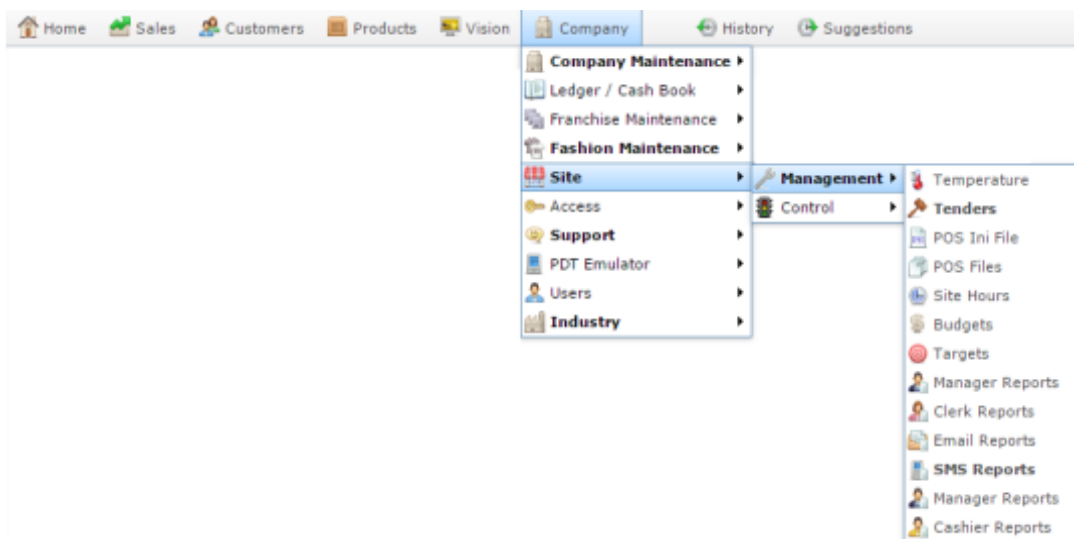
Budget Maintenance screen

Use this screen to set a staff budget for each day within a month to help keep staff costs under control when rostering. The budget is shown in the balance reports if it is met, and may trigger alarms for meeting the budget.

Opening the Budget Maintenance screen

To open the Budget Maintenance screen:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Budgets**.




The Budget Maintenance screen is displayed.

Budget Maintenance

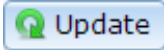
Date: 19/01/2017
Site: AMC
Monthly Budget: \$71,500

Budgets

Date	Day of Week	Budget
1/01/2017	Sunday	\$1,500
2/01/2017	Monday	\$2,000
3/01/2017	Tuesday	\$2,000
4/01/2017	Wednesday	\$2,000
5/01/2017	Thursday	\$3,000
6/01/2017	Friday	\$3,000
7/01/2017	Saturday	\$3,000
8/01/2017	Sunday	\$1,500
9/01/2017	Monday	\$2,000



Budget Maintenance screen key fields and buttons

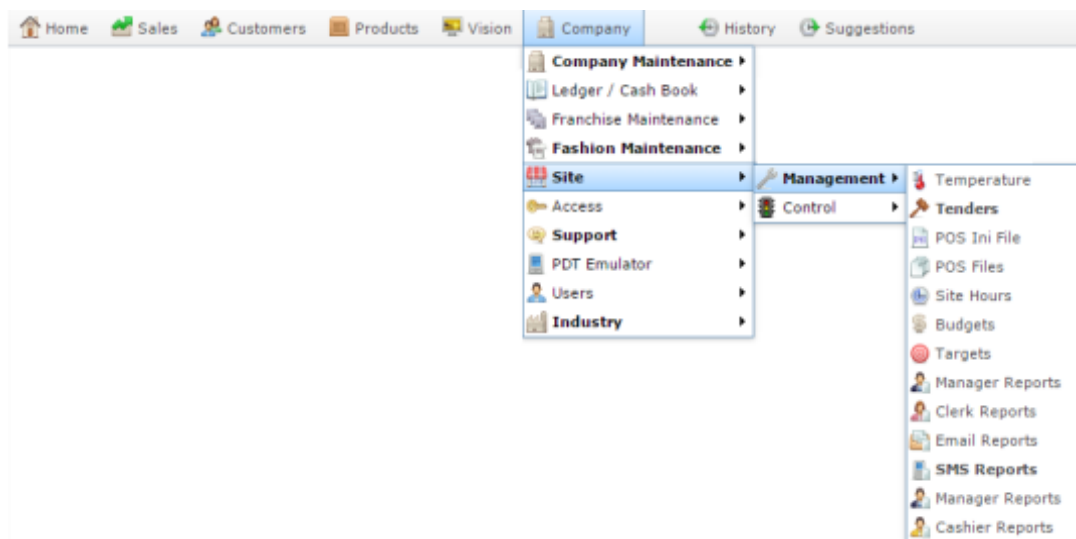
Field	Description
Date	Select the date to identify the month you want to set budgets for.
Site	Select the site to set budgets for.
Monthly Budget	The total of all daily budgets allocated for this month in the grid.
Date	The date to set a budget for.
Day of Week	The day of the week for this date.
Budget	The budget for this date.
	Press to save changes to the budget.

Setting sales targets by the hour

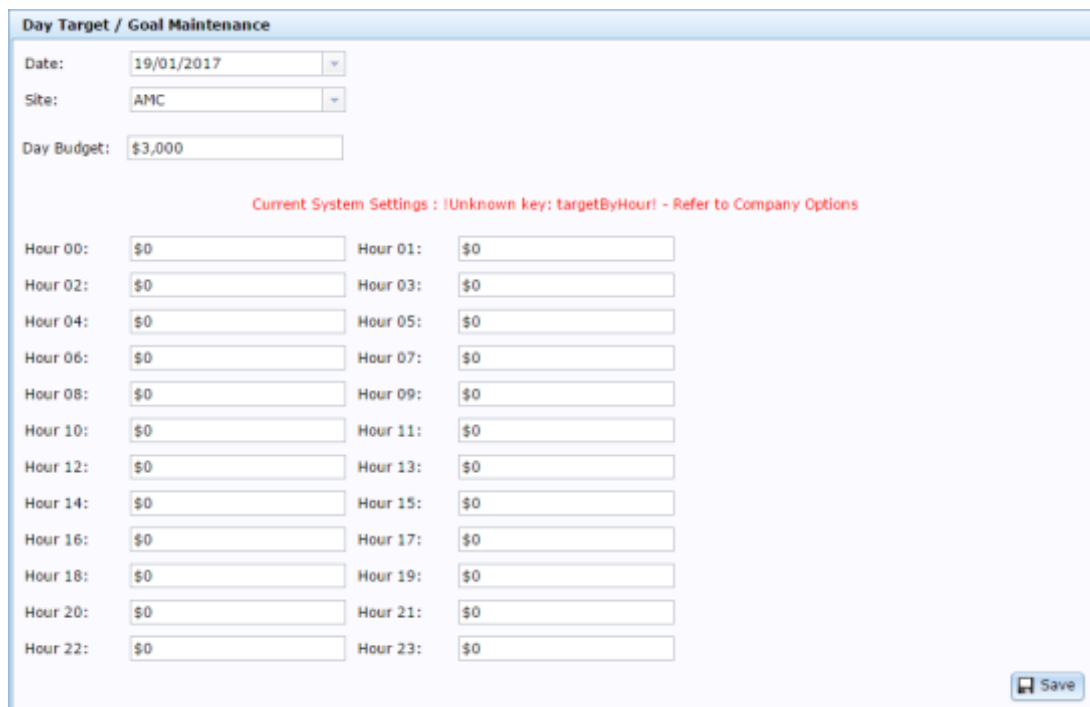
Set sales targets for a specific day to track your actual sales against your expected sales or goals.

To set sales targets:

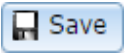
1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Targets**.



The Day Target / Goal Maintenance screen is displayed.



Hour	Target	Hour	Target
Hour 00:	\$0	Hour 01:	\$0
Hour 02:	\$0	Hour 03:	\$0
Hour 04:	\$0	Hour 05:	\$0
Hour 06:	\$0	Hour 07:	\$0
Hour 08:	\$0	Hour 09:	\$0
Hour 10:	\$0	Hour 11:	\$0
Hour 12:	\$0	Hour 13:	\$0
Hour 14:	\$0	Hour 15:	\$0
Hour 16:	\$0	Hour 17:	\$0
Hour 18:	\$0	Hour 19:	\$0
Hour 20:	\$0	Hour 21:	\$0
Hour 22:	\$0	Hour 23:	\$0

3. Select the date you want to set targets for in the [Date](#) field.
4. Select the site you want to set targets for in the [Site](#) drop-down field.
5. Type the total sales target for the day in the [Day Budget](#) field.
6. Type the sales target for each hour in the [Hour](#) fields.
7. Press .

The sales targets are set.


Sales Targets Maintenance screen

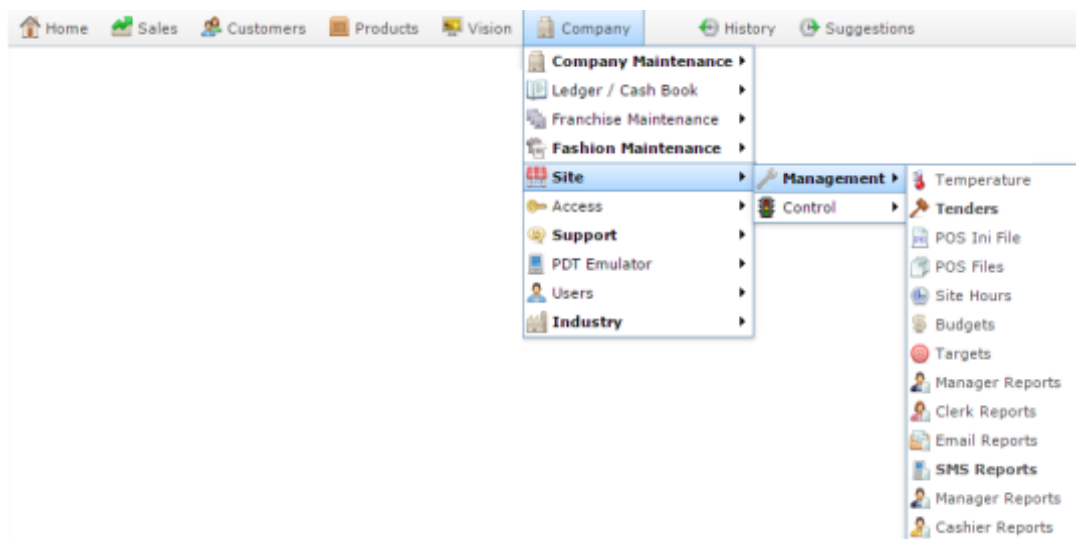
Use this screen to sales targets for specific days.

Tip: You can set default sales targets for each day of the week on the Sales Targets area of Site Options. Use the Day Target / Goal Maintenance screen for specific days where you expect unusual sales records, or to set goals for each hour.

Opening the Day Target / Goal Maintenance screen

To open the Day Target / Goal Maintenance screen:

1. Press  Company in the main menu bar.
2. Press Site > Management > Targets.



The Day Target / Goal Maintenance screen is displayed.

Day Target / Goal Maintenance


Date:

Site:

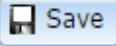
Day Budget:

Current System Settings : !Unknown key: targetByHour! - Refer to Company Options

Hour 00:	<input type="text" value="\$0"/>	Hour 01:	<input type="text" value="\$0"/>
Hour 02:	<input type="text" value="\$0"/>	Hour 03:	<input type="text" value="\$0"/>
Hour 04:	<input type="text" value="\$0"/>	Hour 05:	<input type="text" value="\$0"/>
Hour 06:	<input type="text" value="\$0"/>	Hour 07:	<input type="text" value="\$0"/>
Hour 08:	<input type="text" value="\$0"/>	Hour 09:	<input type="text" value="\$0"/>
Hour 10:	<input type="text" value="\$0"/>	Hour 11:	<input type="text" value="\$0"/>
Hour 12:	<input type="text" value="\$0"/>	Hour 13:	<input type="text" value="\$0"/>
Hour 14:	<input type="text" value="\$0"/>	Hour 15:	<input type="text" value="\$0"/>
Hour 16:	<input type="text" value="\$0"/>	Hour 17:	<input type="text" value="\$0"/>
Hour 18:	<input type="text" value="\$0"/>	Hour 19:	<input type="text" value="\$0"/>
Hour 20:	<input type="text" value="\$0"/>	Hour 21:	<input type="text" value="\$0"/>
Hour 22:	<input type="text" value="\$0"/>	Hour 23:	<input type="text" value="\$0"/>




Day Target / Goal Maintenance screen key fields and buttons

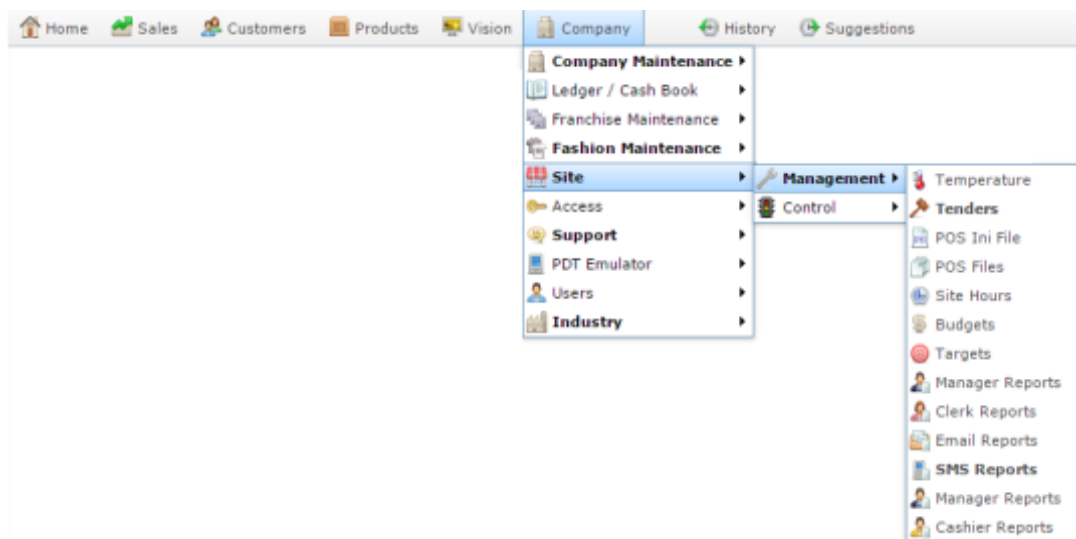
Field	Description
Date	Select the date to set sales targets for.
Site	Select the site to set sales targets for.
Day Budget	The total sales target for this day.
Hour 00 - 23.	The sales target to achieve during this hour.
	Press to save changes to your targets.

Creating a manager report

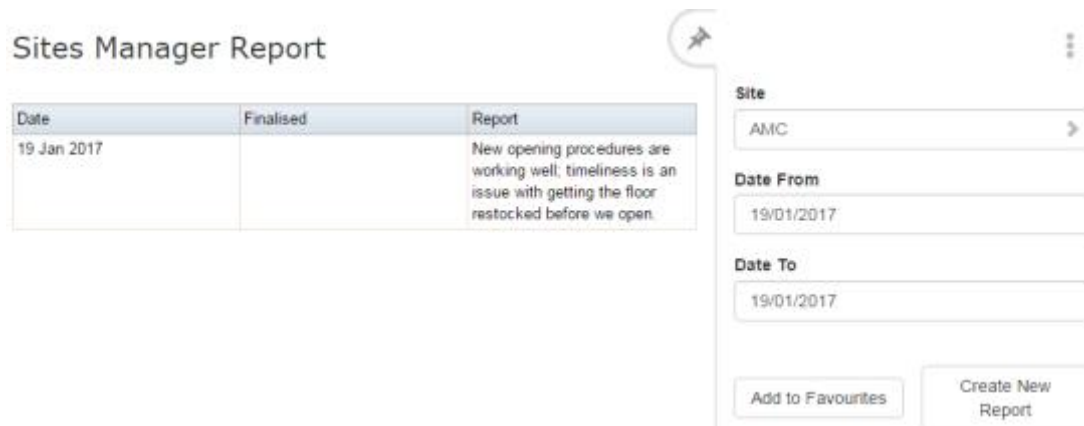
Create a manager report to add it to the balance report, citing reasons for any issues or unusual figures that week.

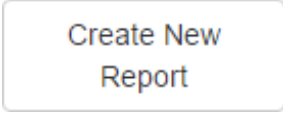
To create a manager report:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Manager Reports**.



The Site Manager report is displayed.



2. Press  .

The Manager Report Maintenance screen is displayed.

Manager Report Maintenance : AMC

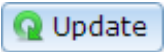
Site: AMC

Date: 19/01/2017

Report

Manager Report: New opening procedures are working well; timeliness is an issue with getting the floor restocked before we open.

Clear Update Finalise


3. Select the site you want to create a report for in the **Site** drop-down field.
4. Select the date the report should be created on in the **Date** field.
5. Type the report in the **Manager Report** field.
6. Press .

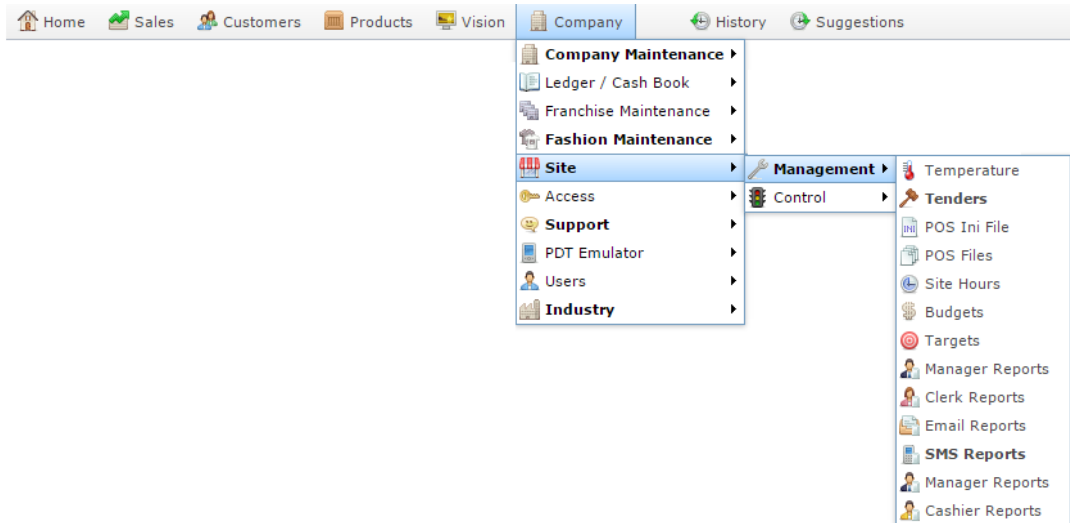
The report is saved.

Editing a manager report

Edit a manager report to change the site it applies to or change what the report says.

To edit a manager report:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Manager Reports**.



The Site Manager report is displayed.

Sites Manager Report

Date	Finalised	Report
19 Jan 2017		New opening procedures are working well; timeliness is an issue with getting the floor restocked before we open.

The form displays the following fields and controls:

- Site:** A dropdown menu with 'AMC' selected.
- Date From:** A text input field containing '19/01/2017'.
- Date To:** A text input field containing '19/01/2017'.
- Buttons:** 'Add to Favourites' and 'Create New Report'.

2. Press the **Date** of the report you want to edit.

The Manager Report Maintenance screen is displayed.

Manager Report Maintenance : AMC

Site: AMC

Date: 19/01/2017

Report

Manager Report: New opening procedures are working well; timeliness is an issue with getting the floor restocked before we open.

Clear Update Finalise

3. Make the required changes.

See *Manager Report Maintenance* screen on page 250.

4. Press  .


The report is saved.

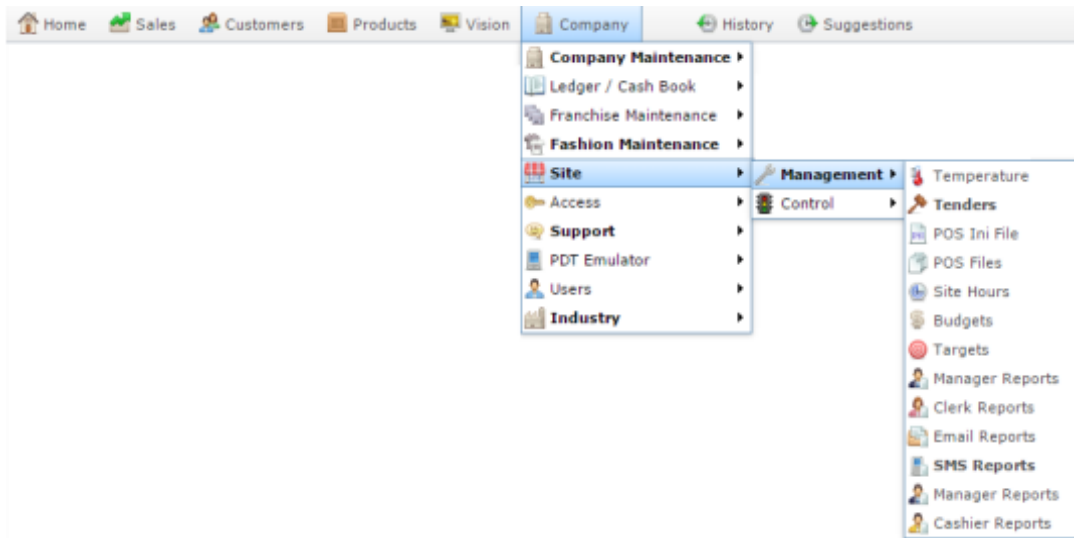
Finalising a manager report

Finalise a report to commit it permanently to the Portal and add it to the balance report.

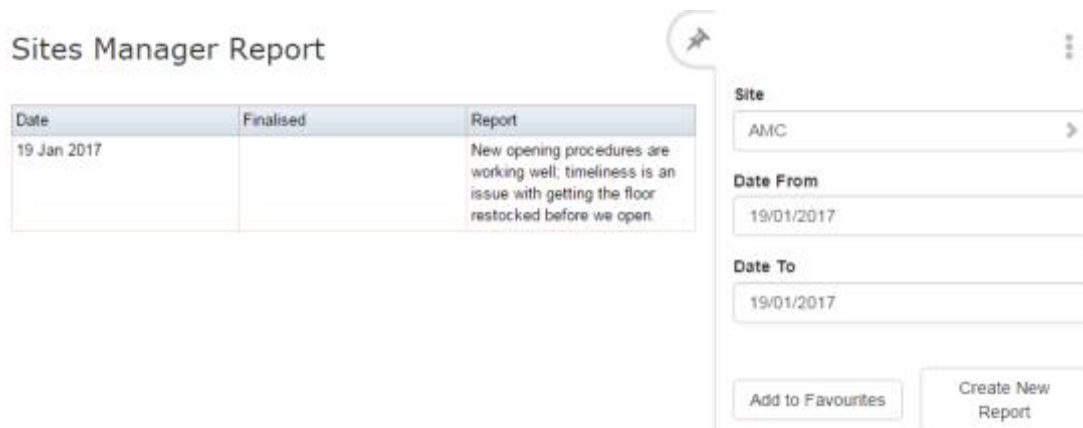
Note: You cannot edit or delete a report that has been finalised.

To finalise a manager report:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Manager Reports**.



The Site Manager report is displayed.



2. Press the **Date** of the report you want to finalise.
The Manager Report Maintenance screen is displayed.

Manager Report Maintenance : AMC

Site: AMC

Date: 19/01/2017

Report

Manager Report: New opening procedures are working well; timeliness is an issue with getting the floor restocked before we open.

Clear Update Finalise

3. Press .


The report is finalised.

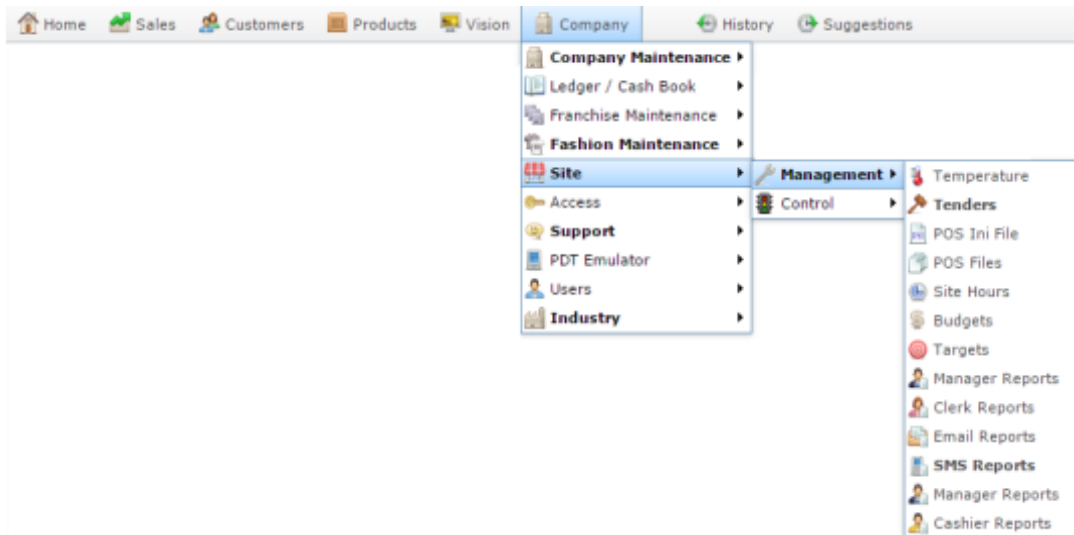
Deleting a manager report

Delete a manager report to remove it from the Portal before it is finalised.

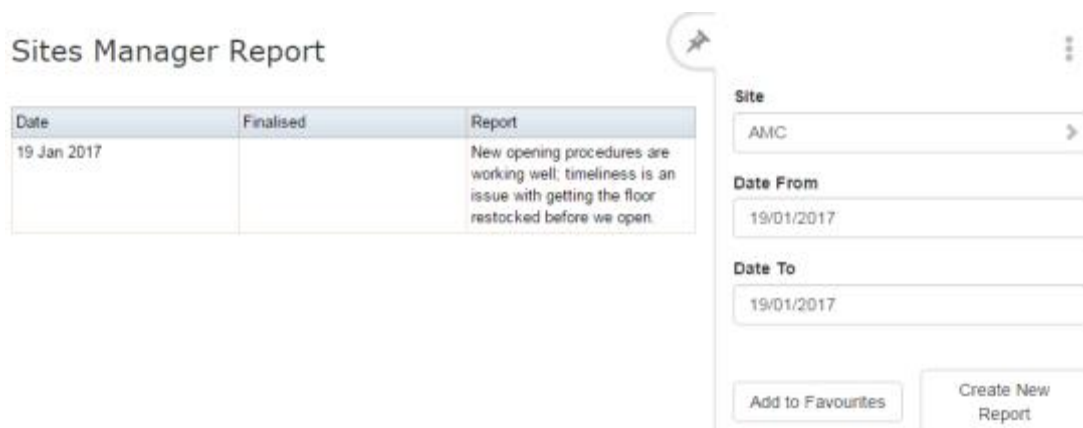
Note: You cannot delete a report that has been finalised.

To delete a manager report:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Manager Reports**.



The Site Manager report is displayed.



2. Press the **Date** of the report you want to delete.

The Manager Report Maintenance screen is displayed.

Manager Report Maintenance : AMC

Site: AMC

Date: 19/01/2017

Report

Manager Report: New opening procedures are working well; timeliness is an issue with getting the floor restocked before we open.

Clear Update Finalise

3. Press .


The report is deleted.

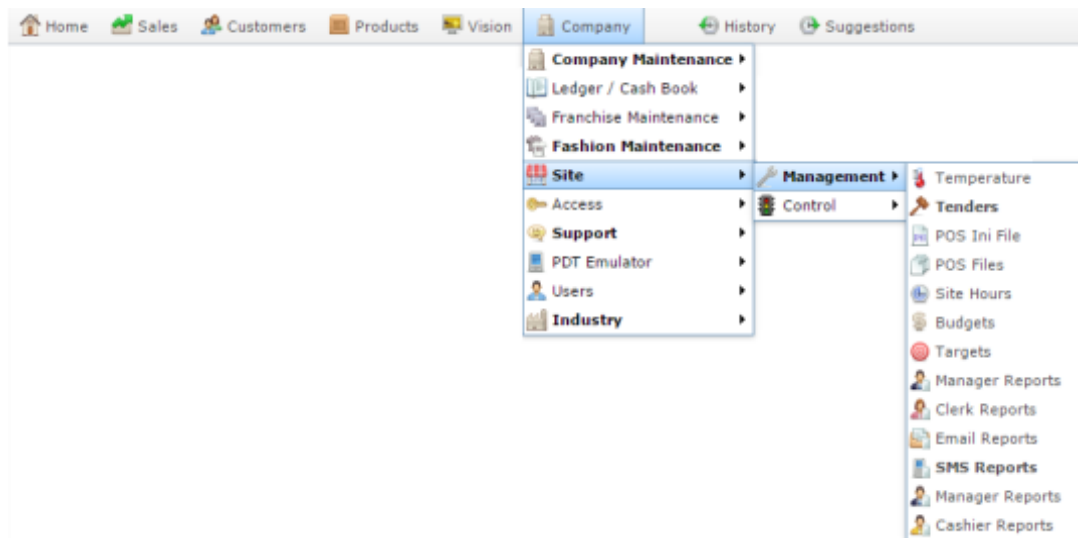
Manager Report Maintenance screen

Use this screen to create manager reports to display with the balance report.

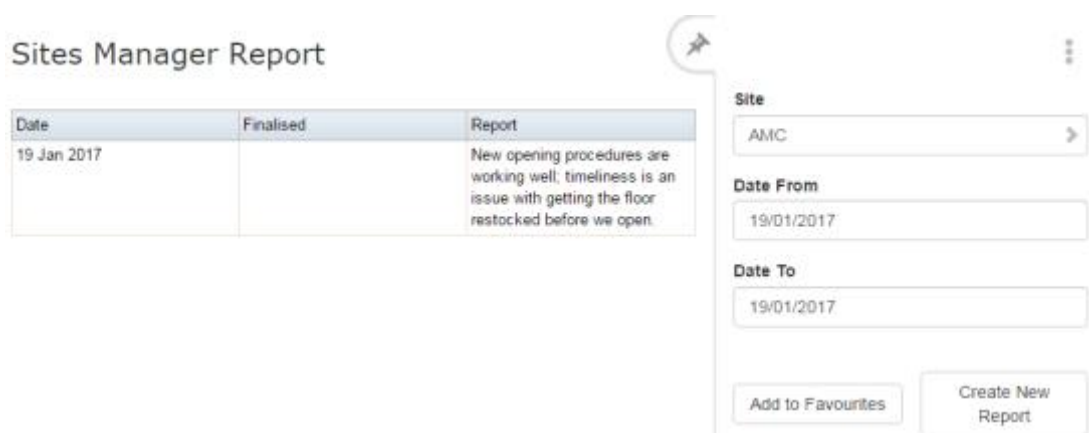
Opening the Manager Report Maintenance screen

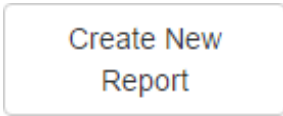
To open the Manager Report Maintenance screen:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Manager Reports**.

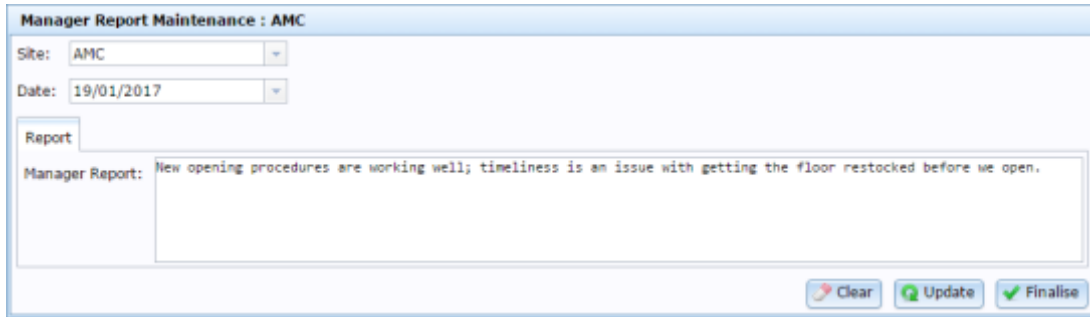


The Site Manager report is displayed.

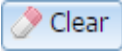
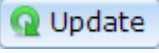
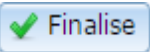


Press  .

3. The Manager Report Maintenance screen is displayed.



Manager Report Maintenance screen key fields and buttons


Field	Description
Site	Select the site to create the report for.
Date	Select the date to report on.
Manager Report	Type the report to submit.
 Clear	Press to clear the report.
 Update	Press to save changes to the report.
 Finalise	Press to finalise and submit the report to the balance report.

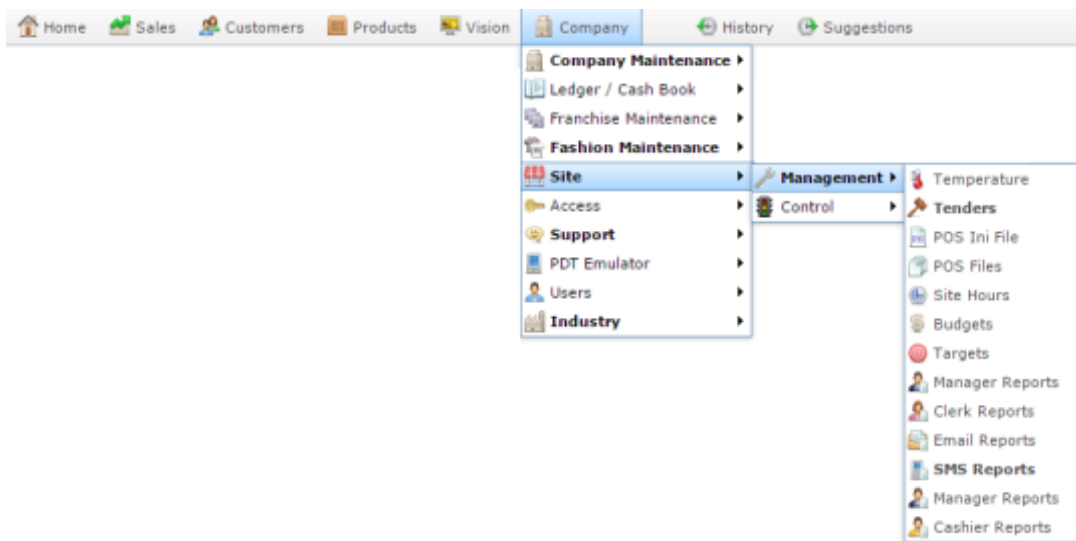
Sites Manager report

Use the Sites Manager report to view and create reports from site managers that are included in the balance report.

Opening the Sites Manager report

To open the Sites Manager report:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Manager Reports**.



The Site Manager report is displayed.

Sites Manager Report

Date	Finalised	Report
19 Jan 2017		New opening procedures are working well, timeliness is an issue with getting the floor restocked before we open.

Site: AMC

Date From: 19/01/2017


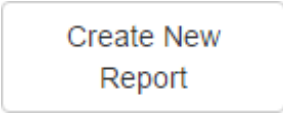
Date To: 19/01/2017

Add to Favourites Create New Report

Sites Manager 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.
	Press to create a new report.
Site / Sites	Select the site or sites to report on.
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 report was created.
Finalised	Whether the report has been finalised.
Report	Details of the report.


Cashier report

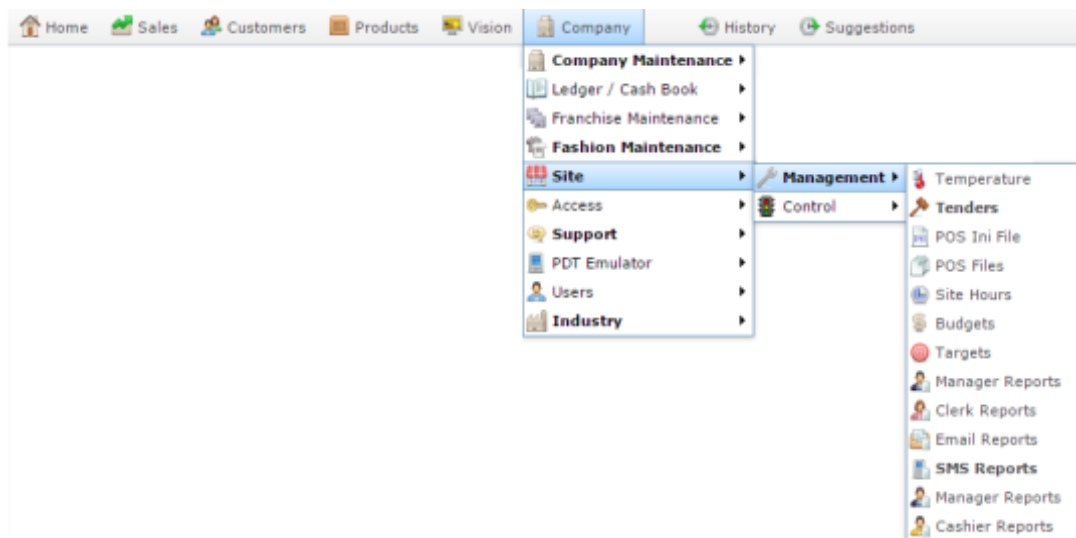
Use the Cashier report to view and create reports from Point of Sale operators and cashiers.

Note: Site Cashier report is created during the cashup process on the Point of Sale.

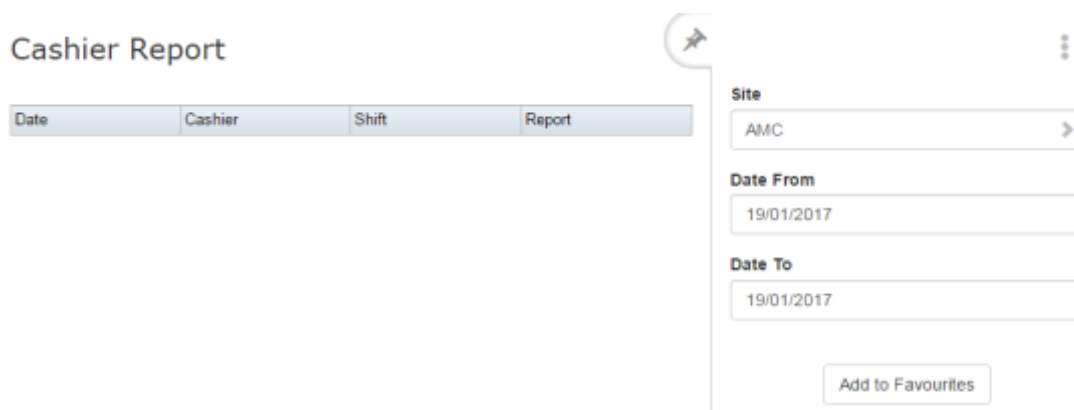
Opening the Cashier report

To open the Cashier report:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Cashier Reports**.



The Cashier report is displayed.



Cashier report key fields

Filters area

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

Field	Description
<input type="button" value="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.
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 report was created.
Clerk / Cashier	Name of the operator or cashier who made the report.
Shift	Shift during which the report was created.
Report	Details of the report.


Sites Operator report

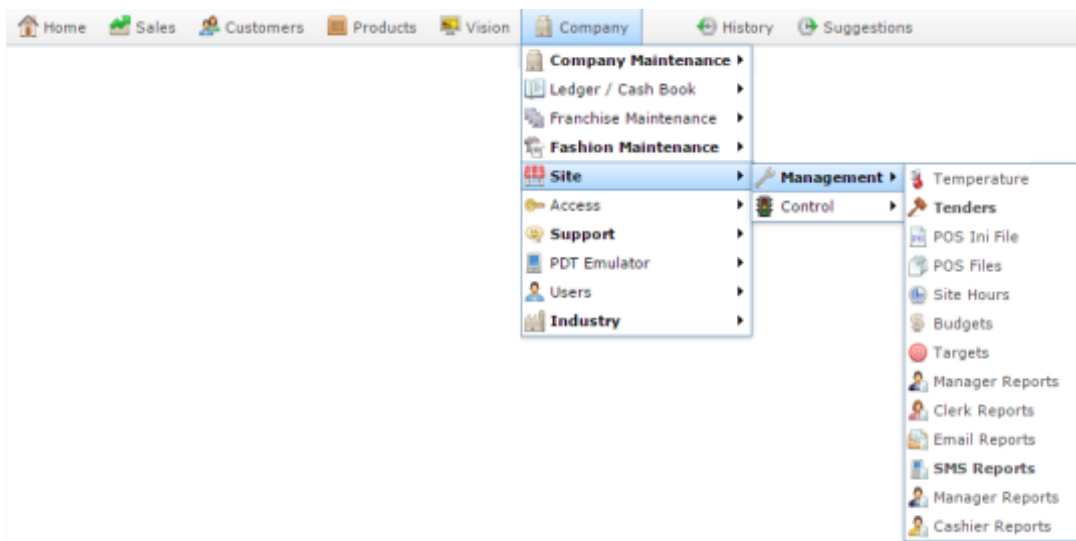
Use the Sites Operator report to view and create reports from Point of Sale operators.

Note: The Sites Cashier report is created during the cashup process on the Point of Sale.

Opening the Sites Operator report

To open the Sites Operator report:

1. Press  Company in the main menu bar.
2. Press Site > Management > Clerk Reports.



The Sites Operator report is displayed.

Sites Operator Report

Date	Clerk	Report
------	-------	--------

Site: AMC

Date From: 19/01/2017

Date To: 19/01/2017

Add to Favourites

Sites Operator report key fields

Filters area

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

Field	Description
<input type="button" value="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.
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.

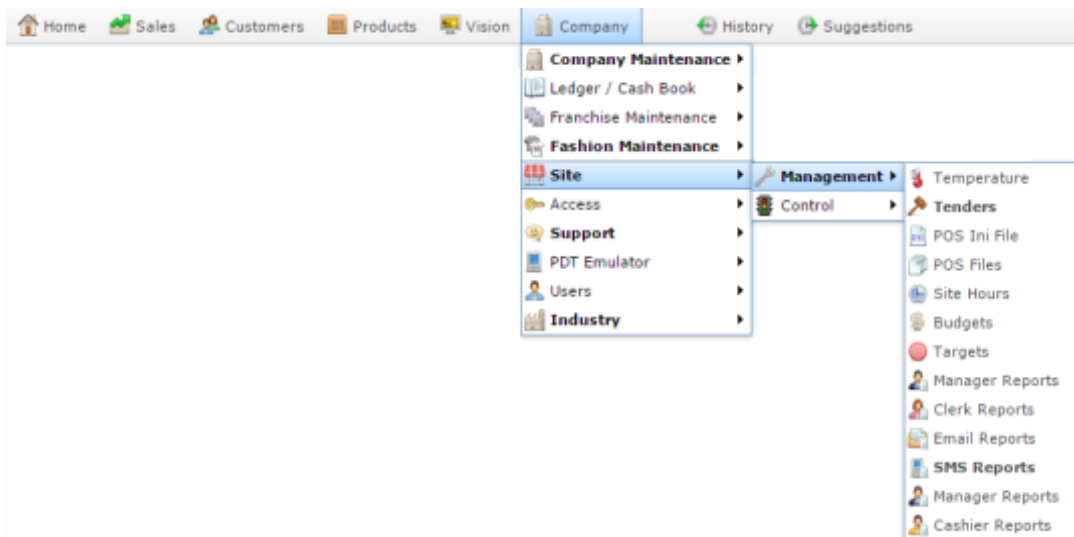
Field	Description
Date	Date the report was created.
Clerk / Cashier	Name of the operator or cashier who made the report.
Report	Details of the report.

Editing a point of sale promotion receipt

Edit a Point of Sale promotion receipt to change how the promotion is printed on your receipts.

To edit a Point of Sale promotion receipt:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > POS Files**.



The POS Promotion File Maintenance screen is displayed.

POS Promotion File Maintenance Amc master

Site:

File:

Trigger Value:

Amount:

Expiry:

Barcode:

Enabled:

Help:

```

<D> Sets line to Double Height Double Width
<H> Sets line to Double Height
<W> Sets line to Double Width
<C> Centres Line
<A> Print Amount
<M> Print Amount as Currency
<E> Sets Expiry Date as per POS Settings
<N> Print Barcode

```

File Contents:

```

This is a test
Line 1
Line 2
Barcode
<N>
Expires <E>
Currency <M>
Amount <A>

```

3. Select the site you want to edit the promotion receipt for in the **Site** drop-down field.
4. Select the promotion file you want to edit in the **File** drop-down field.
5. Type the transaction value that triggers the receipt printing in the **Trigger Value**.
6. Type the amount to display on the receipt in the **Amount** field.
7. Type the number of days until the promotion expires in the **Expiry** field.
8. Type a unique barcode to identify the promotion in the **Barcode** field.
9. Type the promotion as you want it to appear in the **File Contents** file.

Tip: Use the formatting rules in the **Help** section to format your promotion.


10. Press .

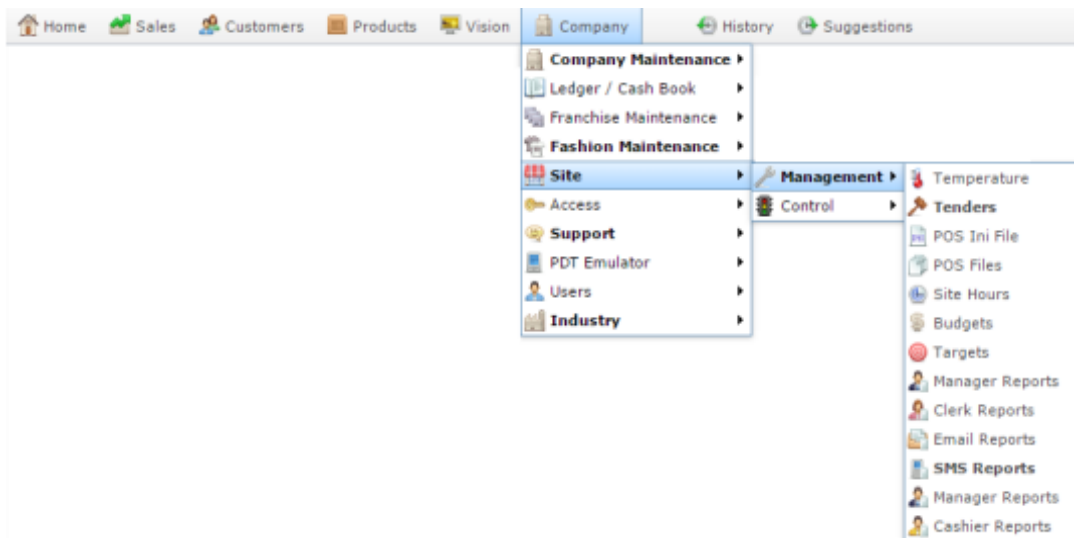
The Point of Sale promotion file is saved.

Disabling a point of sale promotion receipt

Disable a Point of Sale promotion receipt to prevent the receipt printed including it on Point of Sale receipts.

To disable a Point of Sale promotion receipt:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > POS Files**.



The POS Promotion File Maintenance screen is displayed.

POS Promotion File Maintenance Amc master

Site:

File:

Trigger Value:

Amount:

Expiry:

Barcode:

Enabled:

Help:

```

<D> Sets line to Double Height Double Width
<H> Sets line to Double Height
<W> Sets line to Double Width
<C> Centres Line
<A> Print Amount
<M> Print Amount as Currency
<E> Sets Expiry Date as per POS Settings
<N> Print Barcode

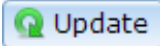
```

File Contents:

```

This is a test
Line 1
Line 2
Barcode
<N>
Expires <E>
Currency <M>
Amount <A>

```

3. Select the site you want to disable the promotion receipt for in the **Site** drop-down field.
4. Select the promotion file you want to disable in the **File** drop-down field.
5. Select **False** in the **Enabled** field.
6. Press .


The Point of Sale promotion file is saved.

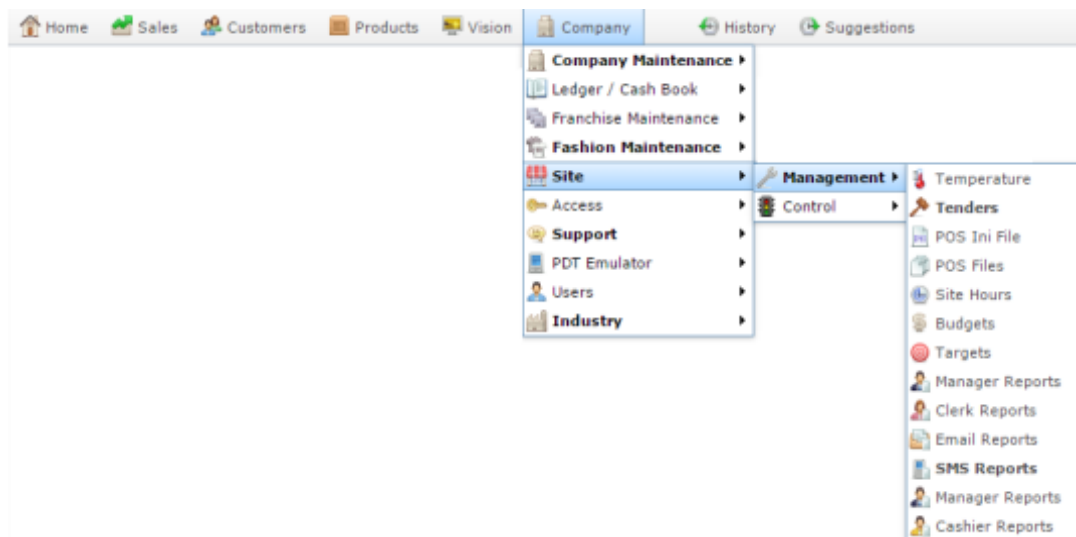
POS Promotion File Maintenance screen

Use this screen to control the promotion information printed on your receipt printers, such as "You have saved \$30 due to a promotion".

Opening the POS Promotion File Maintenance screen

To open the POS Promotion File Maintenance screen:

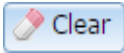
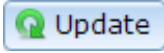
1. Press  **Company** in the main menu bar.
2. Press **Site > Management > POS Files**.



The POS Promotion File Maintenance screen is displayed.

POS Promotion File Maintenance screen key fields and buttons

Field	Description
Site	Select the site to edit the promotion receipt lines for.
File	Select the promotion file you want to edit.
Trigger Value	Type the transaction value that triggers this promotion.
Amount	Type the amount to display.
Expiry	Type the number of days before the promotion information expires.

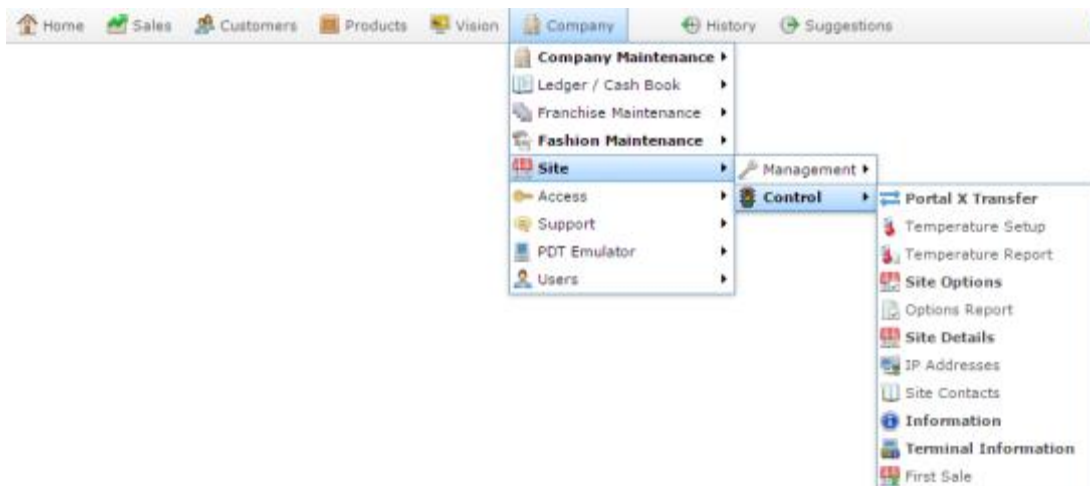
Field	Description
Barcode	Type the unique promotion barcode to identify the promotion.
Enabled	Select whether this promotion is active in the Portal.
Help	Use these tips as formatting assistance for your promotion receipt.
File Contents	Type the promotion information as it should appear on the receipt.
	Delete all the fields for this promotion receipt.
	Save changes to the promotion receipt.

Creating a new temperature measuring point

Create a new temperature measuring point to track the temperature at a particular location in a site. For example, a temperature-equipped camera that sends temperature information to the Portal periodically.

To create a new temperature measuring point:

1. Press  Customers.
2. Press Site > Control > Temperature Setup.



The Temperature Point report is displayed.

Temperature Point Report

Site	Temperatu, Min Pt	Max	Enabled	Comment	Calibrator Alarm	Changed
AMC	Create New Temperatu. Point					
AMC	360	0.0	0.0	✓	1/01/1970	13/10/2001
AMC	Dual Lens	0.0	0.0	✓	1/01/1970	13/10/2001

Site: AMC

Add to Favourites

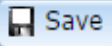
3. Press Create New Temperature Point.

The Temperature Collection Point Maintenance screen is displayed.

The screenshot shows a web form titled "Temperature Collection Point Maintenance Editor". The form contains the following fields and values:

- Company: AMC Master
- Site: AMC (dropdown menu)
- Temperature Point: (empty text box)
- Description: (empty text box)
- Min Temperature: (empty text box)
- Max Temperature: (empty text box)
- SMS Numbers: (empty text box)
- Comments: (empty text box)
- Last Calibration: 9/01/2017 (dropdown menu)
- Enabled: Yes (dropdown menu)


At the bottom right of the form, there are two buttons: "New" and "Save".

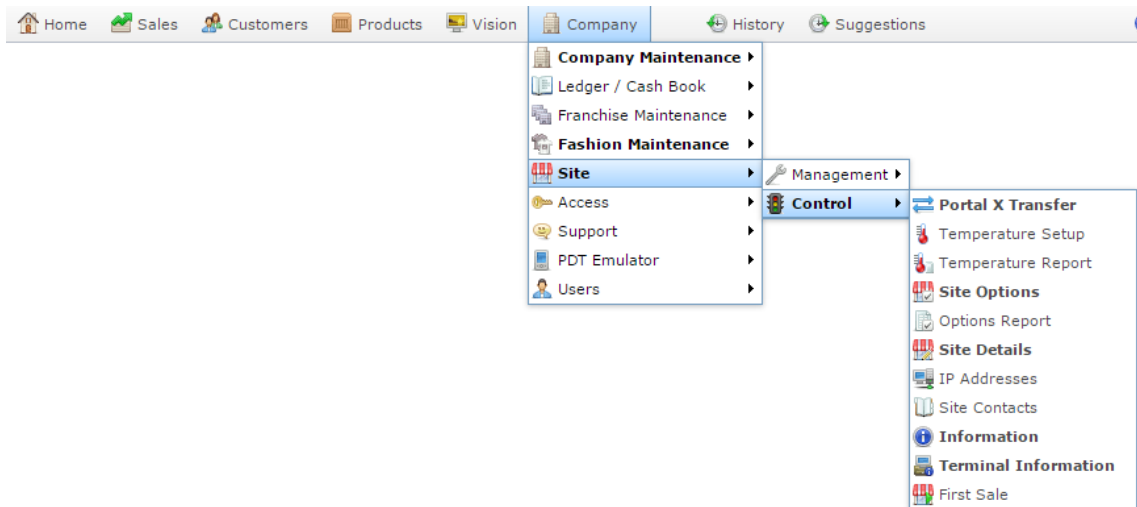
4. Select the site the measuring point is at in the **Site** drop-down field.
 5. Type a unique code to identify the measurement point in the **Temperature Point** field.
 6. Type a description of the point in the **Description** field.
 7. Type the minimum temperature that is acceptable at this point in the **Min Temperature** field.
 8. Type the maximum temperature that is acceptable at this point in the **Max Temperature** field.
 9. Type the mobile phone number to send the temperature alarm SMS to in the **SMS Numbers** field.
 10. Press  **Save**.
- The measurement point is created.

Editing a new temperature measuring point

Edit a temperature measuring point to change the last time the measurement point was calibrated, or change the acceptable temperature range.

To edit a temperature measuring point:

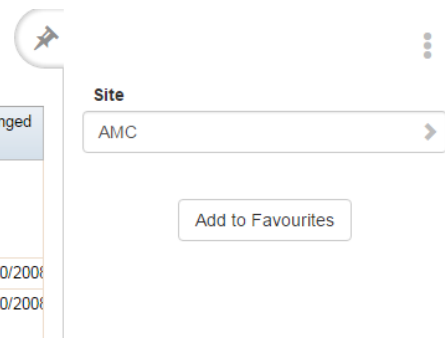
1. Press  Customers.
2. Press **Site > Control > Temperature Setup**.



The Temperature Point report is displayed.

Temperature Point Report

Site	Temperatu Pt	Min	Max	Enabled	Comment	Calibrator	Alarm	Changed
AMC	Create New Temperatu Point							
AMC	360	0.0	0.0	✓		1/01/1970		13/10/2008
AMC	Dual Lens	0.0	0.0	✓		1/01/1970		13/10/2008






3. Press the **Temperature Pt** of the measuring point you want to edit.

The Temperature Collection Point Maintenance screen is displayed.

Temperature Collection Point Maintenance Editor

Company:	AMC Master
Site:	AMC
Temperature Point:	[102] 360
Description:	360
Min Temperature:	0
Max Temperature:	0
SMS Numbers:	
Comments:	
Last Calibration:	1/01/1970
Enabled:	Yes

4. Edit the fields as required.

See *Temperature Collection Point Maintenance* screen on page 274.

5. Press .

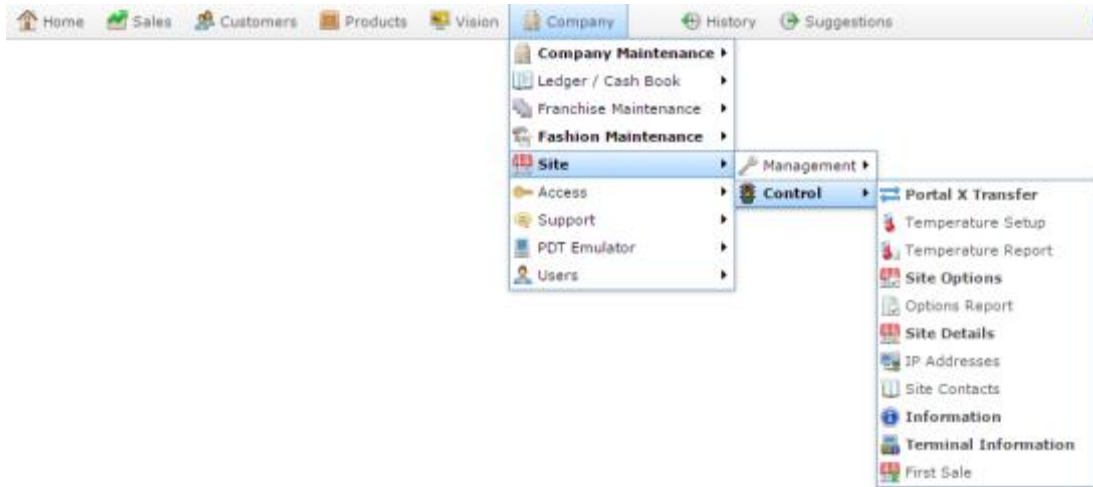
The measurement point is saved.

Deleting a temperature measuring point

Delete a temperature point to remove it from the Portal.

To delete a temperature measuring point:

1. Press  Customers.
2. Press Site > Control > Temperature Setup.



The Temperature Point report is displayed.

Temperature Point Report

Site	Temperatu, Min Pt	Max	Enabled	Comment	Calibrator	Alarm	Changed
AMC	Create New Temperatu, Point						
AMC	360	0.0	0.0	✓		1/01/1970	13/10/2001
AMC	Dual Lens	0.0	0.0	✓		1/01/1970	13/10/2001

Site: AMC

Add to Favourites

3. Press the **Temperature Pt** of the measuring point you want to delete.

The Temperature Collection Point Maintenance screen is displayed.

Temperature Collection Point Maintenance Editor

Company: AMC Master

Site: AMC

Temperature Point: [102] 360

Description: 360

Min Temperature: 0

Max Temperature: 0

SMS Numbers:

Comments:

Last Calibration: 1/01/1970

Enabled: Yes

New Delete Save

4. Press .


The measurement point is deleted.

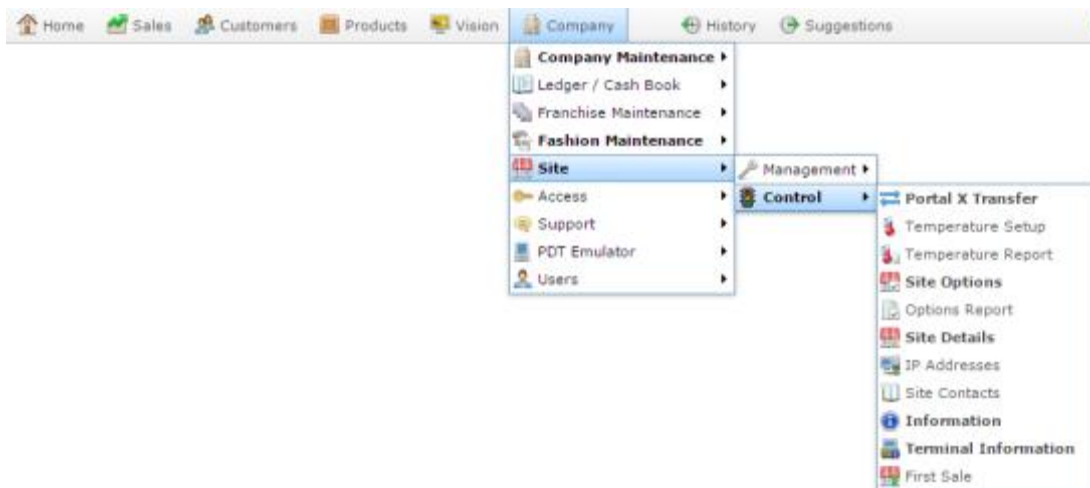
Temperature Collection Point Maintenance screen

Use this screen to create and maintain automatic temperature collection points in your site.

Opening the Temperature Collection Point Maintenance screen

To open the Temperature Collection Point Maintenance screen:

1. Press  Customers.
2. Press Site > Control > Temperature Setup.



The Temperature Point report is displayed.

Temperature Point Report

Site	Temperatu, Min Pt	Max	Enabled	Comment	Calibrator Alarm	Changed
AMC	Create New Temperatu. Point					
AMC	360	0.0	0.0	✓	1/01/1970	13/10/2001
AMC	Dual Lens	0.0	0.0	✓	1/01/1970	13/10/2001

Site: AMC

Add to Favourites

3. Press the Temperature Pt of the temperature you want to edit.

The Temperature Collection Point Maintenance screen is displayed.

Temperature Collection Point Maintenance Editor

Company: AMC Master

Site: AMC

Temperature Point: [102] 360

Description: 360

Min Temperature: 0

Max Temperature: 0

SMS Numbers:

Comments:

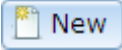

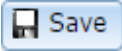
Last Calibration: 1/01/1970

Enabled: Yes

New Delete Save

Temperature Collection Point Maintenance screen key fields and buttons

Field	Description
Company	The company the temperature measurement point is for.
Site	The site where the temperature is measured.
Temperature Point	The unique code of the measurement point.
Description	The description of the measurement point.
Min Temperature	The minimum acceptable temperature at this point.
Max Temperature	The maximum acceptable temperature at this point.
SMS Numbers	The phone number to send an alarm SMS to when the temperature is measured outside the acceptable levels.


Field	Description
Comments	Add a comment on this measurement point.
Last Calibration	Date this measurement point was last calibrated.
Enabled	Whether this measurement point is currently used.
 New	Create a new measurement point.
 Delete	Delete this measurement point.
 Save	Save any changes to this measurement point.

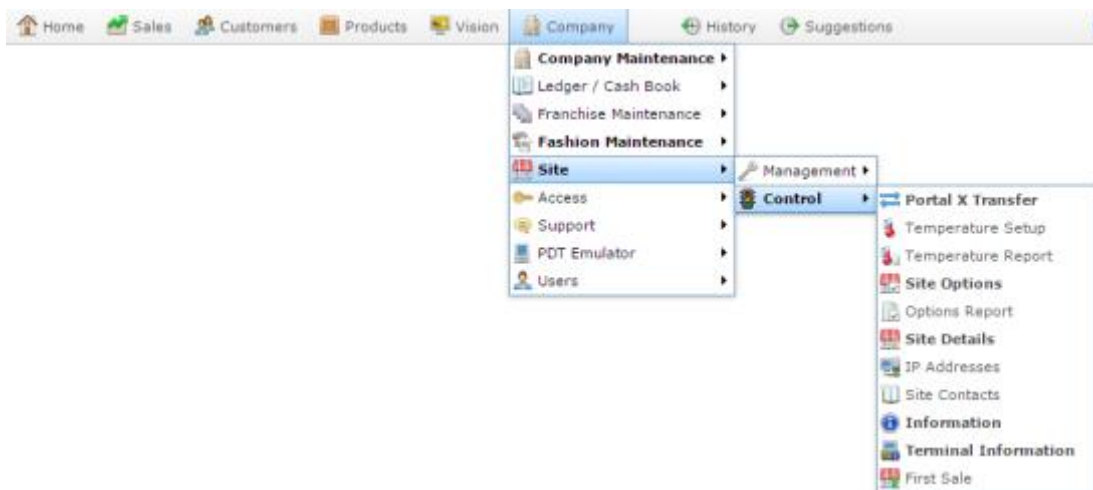
Temperature Point report

Use the Temperature Point report to view the areas at a site that are used to measure the temperature.

Opening the Temperature Point report

To open the Temperature Point report:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Temperature Setup**.



The Temperature Point report is displayed.

Temperature Point Report

Site	Temperatu, Min Pt	Max	Enabled	Comment	Calibrator Alarm	Changed
AMC	Create New Temperatu. Point					
AMC	360	0.0	0.0	✓	1/01/1970	13/10/2001
AMC	Dual Lens	0.0	0.0	✓	1/01/1970	13/10/2001

Site:

Temperature Point report key fields

Filters area

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

Field	Description
<input type="button" value="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.

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	The site where this point measures temperature.
Temperature Pt	The name of the measuring point.
Min	The minimum temperature acceptable at this point.
Max	The maximum temperature acceptable at this point.
Enabled	Whether temperature is measured at this point currently.
Comment	Comment on this measurement point.
Calibration	Date this point was last calibrated.
Alarm	Date the temperature alarm was last activated.

Field	Description
Changed	Date this measurement point was last updated.

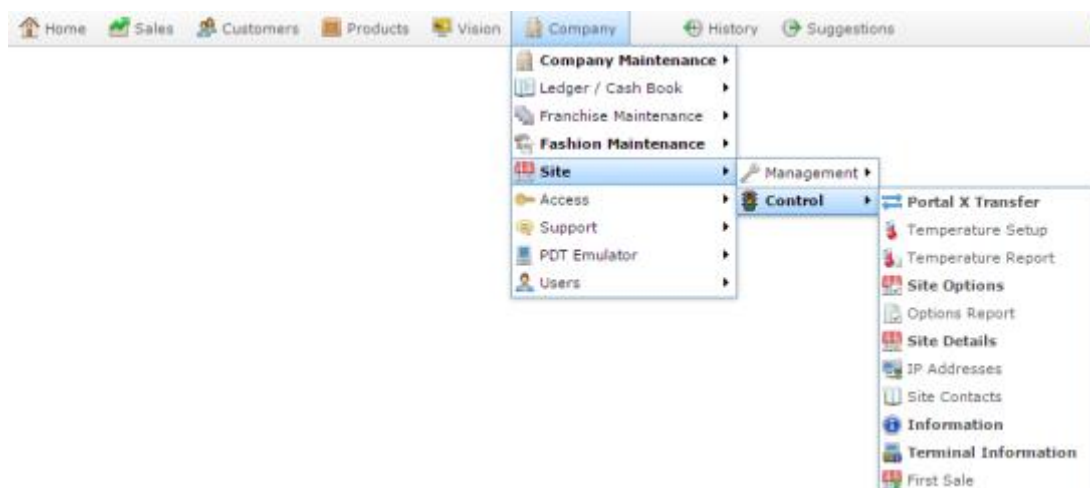
Creating a new temperature measurement

Create a temperature measurement to record temperature at a specific point at your site.

Note: Usually temperature is recorded by a remote device that automatically sends temperature reports to the Portal periodically, but you can also input your own temperature information.

To create a new temperature measurement:

1. Press  Company.
2. Press Site > Control > Temperature Report.



The Temperature History report is displayed.

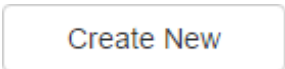
Temperature History Report

Date	Recording Point	Recording Time	Temperature	Alarm Sent	Comment	Calibration	Last Edit
2017-01-09	Dual Lens	09:00	1.8			01 JAN 1970	2017-01-09 00:00:00

Site: AMC

Week Containing Date: 9/01/2017

Add to Favourites New

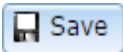
3. Press .

The Temperature Editor screen is displayed.

The screenshot shows a web form titled "Temperature Editor". The form contains the following fields and values:

Company:	AMC Master
Date:	9/01/2017
Site:	AMC
Temperature Point:	Dual Lens
Hour:	09 AM
Minute:	00
Temperature:	1.8
Comments:	

At the bottom right of the form, there are two buttons: "New" and "Save".

4. Select the site the measurement occurred at in the **Site** drop-down field.
5. Select the measuring point the record was made at in the **Temperature Point** drop-down field.
6. Select the time the record was taken in the **Hour** and **Minute** drop-down fields.
7. Type the temperature that was recorded in the **Temperature** field.
8. Press  Save.

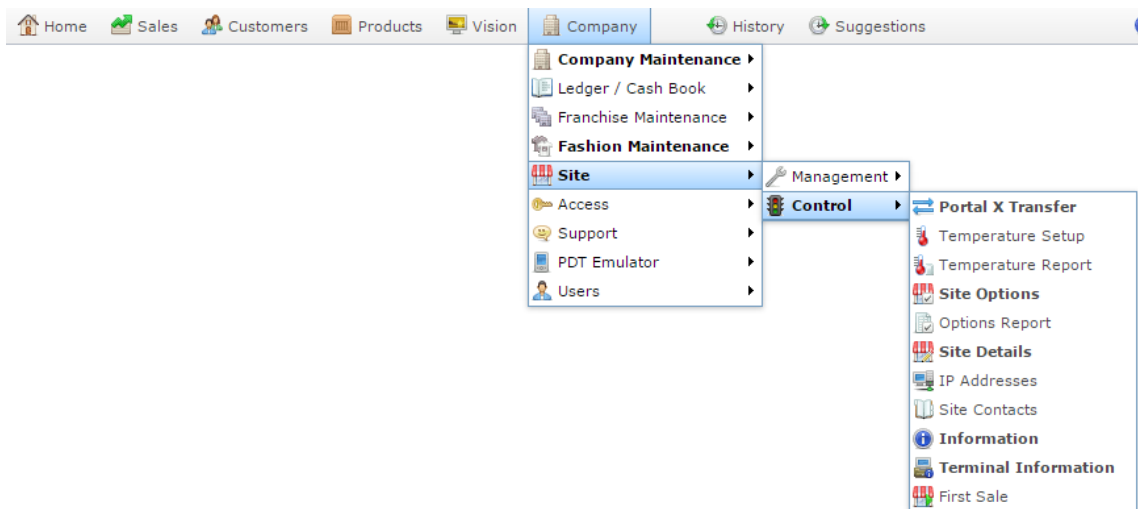
The temperature is recorded.

Editing a temperature measurement

Edit a temperature measurement to change the measuring point, time or temperature that was recorded.

To edit a temperature measurement:

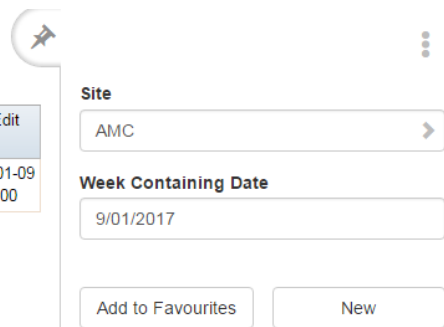
1. Press  **Company**.
2. Press **Site > Control > Temperature Report**.



The Temperature History report is displayed.

Temperature History Report

Date	Recording Point	Recording Time	Temperature	Alarm Sent	Comment	Calibration	Last Edit
2017-01-09	Dual Lens	09:00	1.8			01 JAN 1970	2017-01-09 00:00:00





The screenshot shows the form for the Temperature History Report. It includes a 'Site' dropdown menu with 'AMC' selected, a 'Week Containing Date' input field with '9/01/2017' entered, and two buttons: 'Add to Favourites' and 'New'.

3. Press the **Recording Point** of the measurement you want to edit.

The Temperature Editor screen is displayed.

Temperature Editor

Company:	AMC Master
Date:	9/01/2017
Site:	AMC
Temperature Point:	Dual Lens
Hour:	09 AM
Minute:	00
Temperature:	1.8
Comments:	

4. Edit the fields as required.

See *Temperature Editor* screen on page 287.


5. Press  .

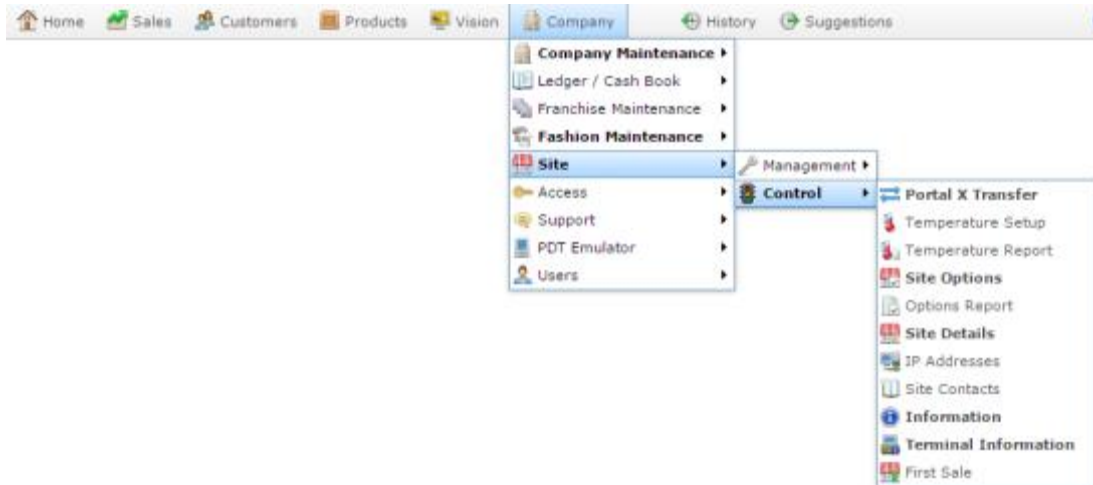
The temperature is saved.

Deleting a temperature measurement

Delete a temperature measurement to remove it from the Portal.

To delete a temperature measurement:

1. Press  **Company**.
2. Press **Site > Control > Temperature Report**.



The Temperature History report is displayed.



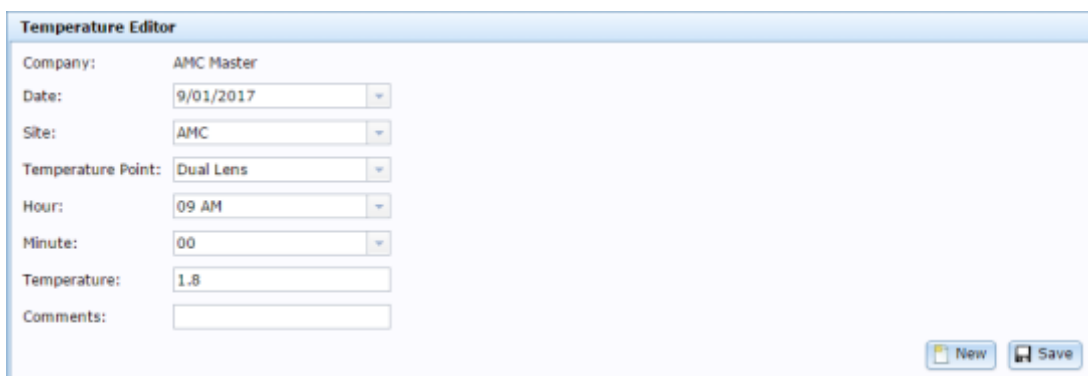
The screenshot shows the 'Temperature History Report' interface. It features a table with the following data:

Date	Recording Point	Recording Time	Temperature	Alarm Sent	Comment	Calibration	Last Edit
2017-01-09	Dual Lens	09:00	1.8			01 JAN 1970	2017-01-09 00:00:00

Below the table, there are several controls: a 'Site' dropdown menu set to 'AMC', a 'Week Containing Date' input field set to '9/01/2017', and two buttons: 'Add to Favourites' and 'New'.

3. Press the **Recording Point** of the measurement you want to delete.

The Temperature Editor screen is displayed.



The screenshot shows the 'Temperature Editor' screen. It contains the following fields and controls:

- Company: AMC Master
- Date: 9/01/2017 (dropdown)
- Site: AMC (dropdown)
- Temperature Point: Dual Lens (dropdown)
- Hour: 09 AM (dropdown)
- Minute: 00 (dropdown)
- Temperature: 1.8 (text input)
- Comments: (text input)

At the bottom right, there are two buttons: 'New' and 'Save'.

4. Press .

The temperature is deleted.

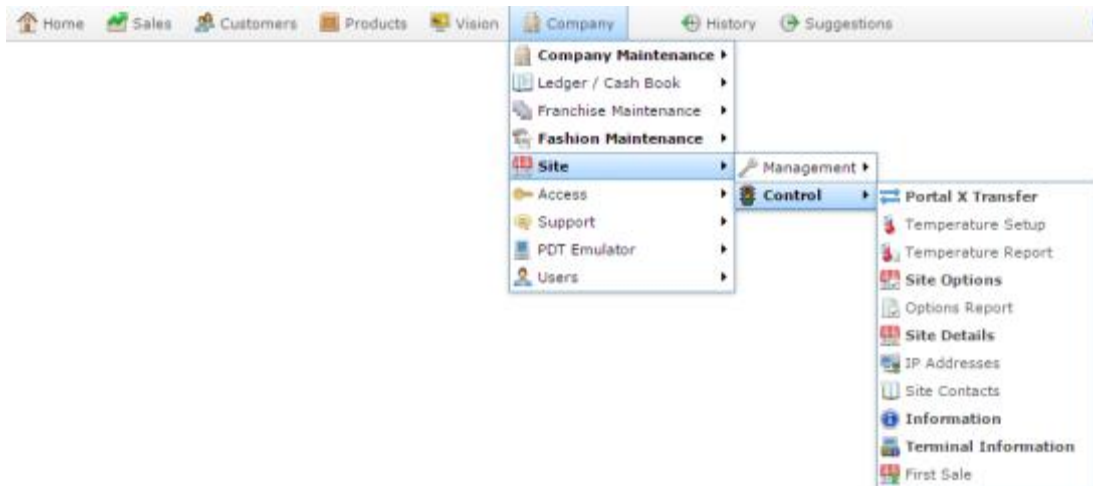
Temperature Editor screen

Use this screen to record the temperature at a measuring point.

Opening the Temperature Editor screen


To open the Temperature Editor screen:

1. Press  Company.
2. Press Site > Control > Temperature Report.



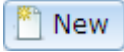
The Temperature History report is displayed.


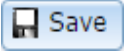


3. Press .

The Temperature Editor screen is displayed.

Temperature Editor screen key fields and buttons

Field	Description
Company	The company temperature is being measured at.
Date	The date the measurement was taken.
Site	The site the temperature is measured at.
Temperature Point	The temperature point the measurement was taken at.
Hour	The hour the measurement was taken.
Minute	The minute the measurement was taken.
Temperature	The temperature recorded.
Comments	And comment made on the measurement.
 New	Create a new measurement.


Field	Description
	Delete this measurement.
	Save changes to this measurement.

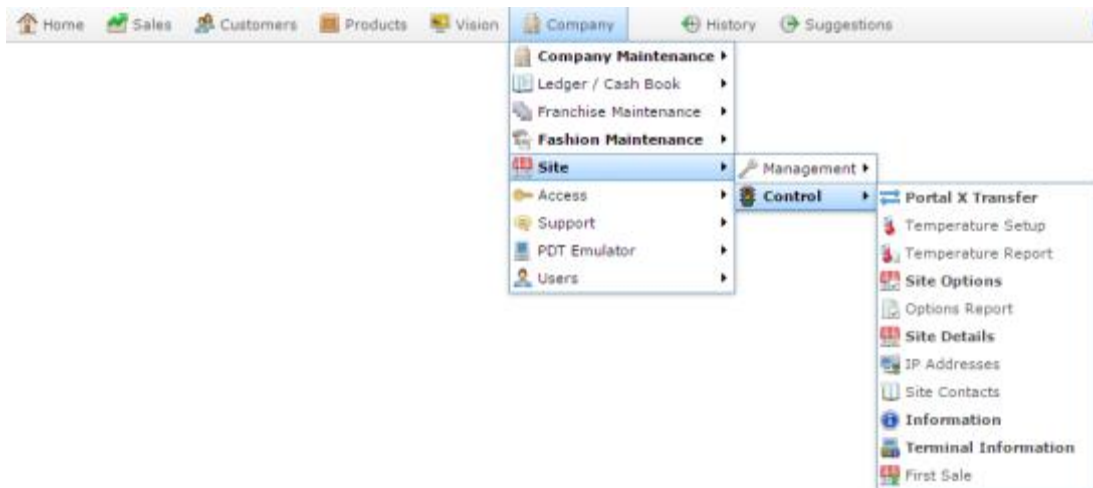
Temperature History report

Use the Temperature History report to view the temperature measurements over time.

Opening the Temperature History report

To open the Temperature History report:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Temperature Report**.



The Temperature History report is displayed.

Temperature History Report

Date	Recording Point	Recording Time	Temperature	Alarm Sent	Comment	Calibration	Last Edit
2017-01-09	Dual Lens	09:00	1.8			01 JAN 1970	2017-01-09 00:00:00

Site:

Week Containing Date:

Temperature History report key fields

Filters area

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

Field	Description
<input type="button" value="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.
Week / Week Containing Date	Select the week 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 temperature was measured.
Recording Point	Measurement point where the temperature was measured.
Recording Time	Time the temperature was measured.
Temperature	Temperature that was measured in degrees Celcius.
Alarm Sent	Indicates whether an alarm was sent about this temperature.
Comment	Comment on this measurement.
Calibration	Date this measurement point was last calibrated.
Last Edit	Date this temperature was edited.

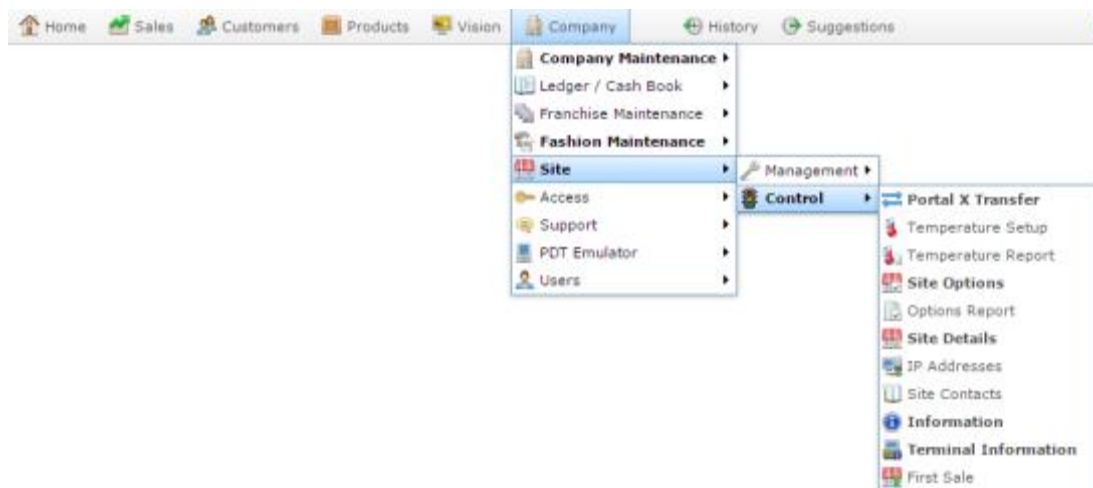
Site Details Contacts report

Use the Site Details Contacts report to view the contact details of your sites.

Opening the Site Details Contacts report

To open the Site Details Contacts report:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Site Contacts**.



The Site Details Contacts report is displayed.

Sites Details

Name	Site	Company	Type	Post Code	Phone	Manager	Contact
AMC		1 AMC Master	Wholesale	3004		Bob Bird	
Apple Demo	300	Apple Store	Retail	3000			
Australia	501	DKSH	Retail	3000			

States
All

Add to Favourites

Site Details Contacts report key fields

Filters area

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

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
States	Select a state or county to filter the report by.

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 / Name	The name of the relevant site.
Site # / Site	The site code of the relevant site.
Company	The name of the relevant company.
Type	The type of site, for example Wholesale or Retail.
Post Code	The post code of the contact address for this site.
Phone	The contact phone number for this site.
Manager	The name of the manager for this site.

Field	Description
Contact	The name of the person to contact regarding this site.

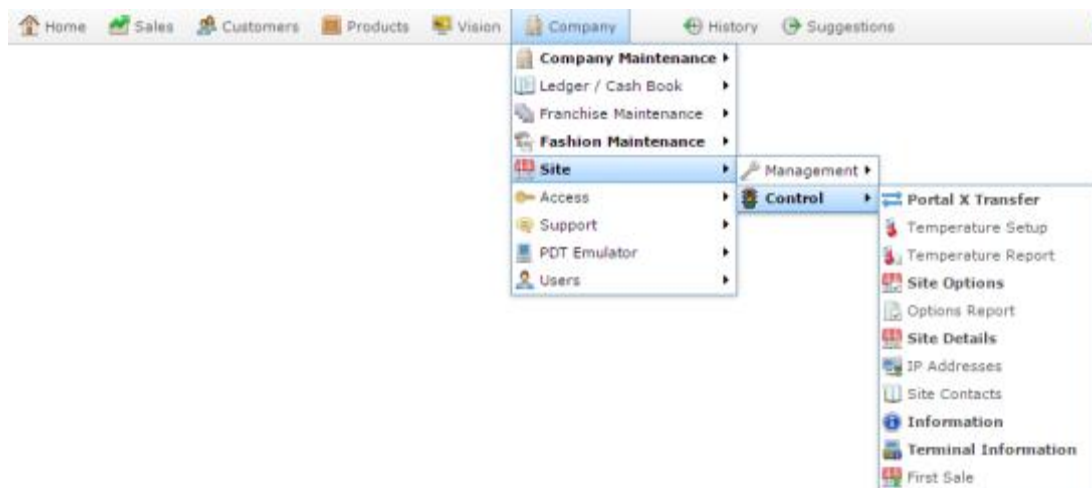
Sites Trading Details report

Use the Sites Trading Details report to view the earliest and most recent sales at each site.

Opening the Sites Trading Details report

To open the Sites Trading Details report:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > First Sale**.



The Sites Trading Details report is displayed.

Sites Trading Details

Name	Site	Company	First Trade	Last Trade	Active
AMC	1	AMC Master	17/04/2007	3/01/2017	✓
Apple Demo	300	Apple Store	10/06/2006	29/09/2016	✓

Add to Favourites

Sites Trading Details 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.

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 / Name	The name of the relevant site.
Site # / Site	The site code of the relevant site.
Company	The name of the relevant company.
First Trade	Date of first sale at this site.
Last Trade	Date of most recent sale at this site or terminal.
Active	Whether this site is currently active in the Portal.

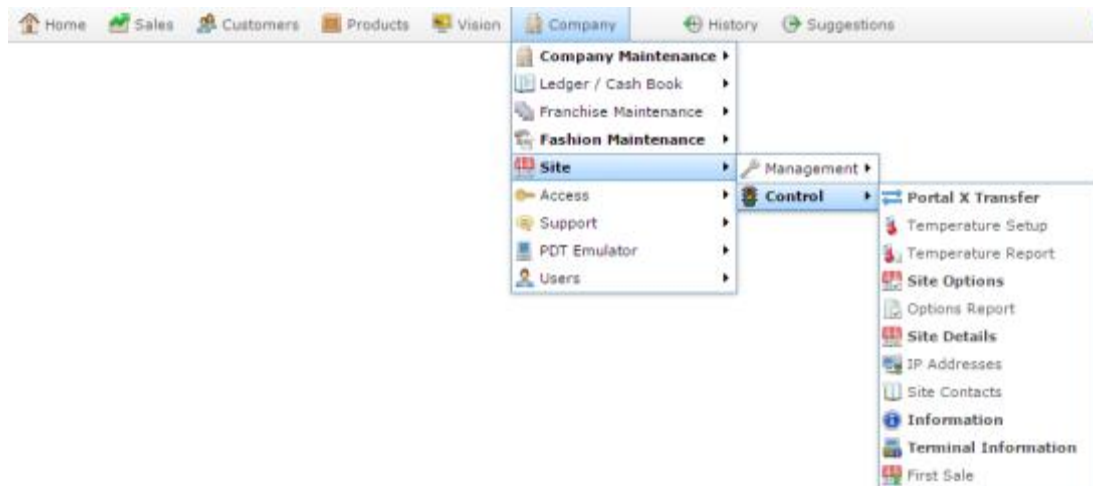
Sites Details report

Use the Sites Details report to view the terminals, PDTs and pending updates for each site.

Opening the Sites Details report

To open the Sites Details report:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Terminal Information**.



The Sites Details report is displayed.

Sites Details

Name	Site	Company	Type	Location	Terminal	PDTs	Pending Portal->Site	Pending Portal->Portal	Pending Portal->Terminal
AMC	1	AMC Master	Wholesale	Not Enabled	44	8	0	0	1474
Apple Demo	300	Apple Store	Retail	Not Enabled	8	1	0	0	5
Australia	501	DKSH	Retail	Not Enabled	0	0	0	0	0

Add to Favourites

Sites Details 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.

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 / Name	The name of the relevant site.
Site # / Site	The site code of the relevant site.
Company	The name of the relevant company.
Type	The type of site, for example Wholesale or Retail.
Location	Whether locations ("sub-sites" are enabled at this site.
Terminals	Number of terminals at this site.
PDTs	Number of PDTs at this site.
Pending Portal -> Site	Number of updates pending from the portal to this site.

Field	Description
Pending Portal -> Portal	Number of updates pending from a Master Portal to a branch Portal. <div data-bbox="911 454 1393 618" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;">Note: This is a legacy field, updates are no longer performed via this function.</div>
Pending Portal -> Terminal	Number of updates pending from the portal to the terminals at this site.

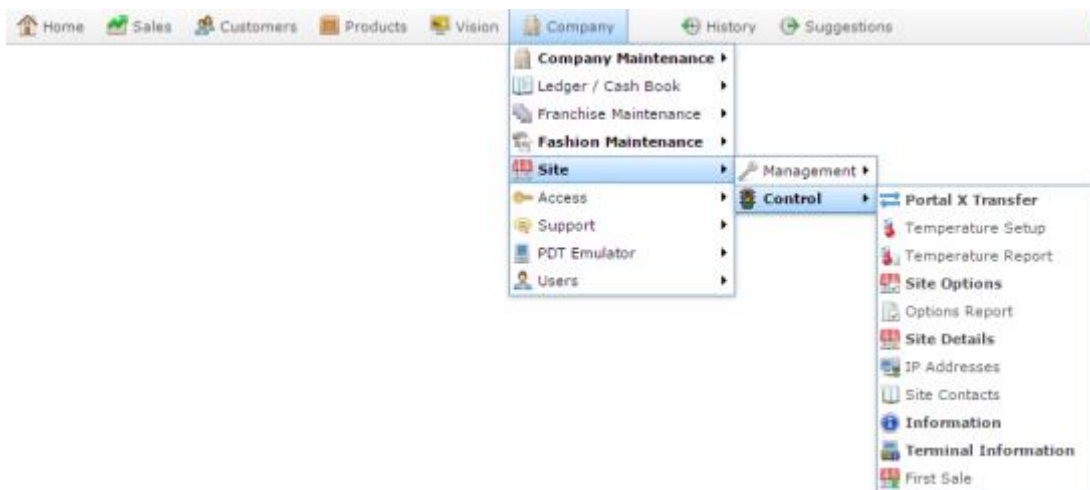
Site Details IP Addresses report

Use the Site Details IP Addresses report to view the last IP address and contact time of each site.

Opening the Site Details IP Addresses report

To open the Site Details IP Addresses report:

1. Press  Company from the menu bar.
2. Press Site > Control > IP Addresses.



The Site Details IP Addresses report is displayed.

Sites Details

Name	Site	Company	Type	VNC	Last IP Address	Time	Phone	Contact
AMC	1	AMC Master	Wholesale		110.22.13	9/01/2017		
Apple Demo	300	Apple Store	Retail		110.77.13	29/09/201		
Chadston	500	Example Company	Retail		203.217.8	9/01/2017	03 9569 4177	

States: All

Add to Favourites

Site Details IP Addresses report key fields

Filters area

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

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
States	Select a state or county to filter the report by.

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 / Name	The name of the relevant site.
Site # / Site	The site code of the relevant site.
Company	The name of the relevant company.
Type	The type of site, for example Wholesale or Retail.
VNC	Remote access for this site.
Last IP Address	The site's last-known IP address.
Time	Time this site last contacted the Portal.
Phone	The contact phone number for this site.


Field	Description
Contact	The name of the person to contact regarding this site.

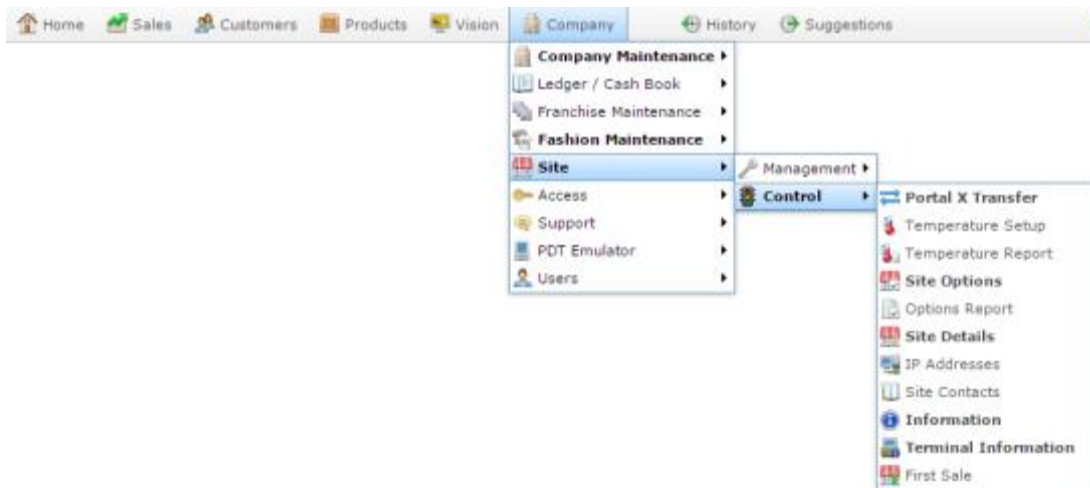
Terminal Information report

Use the Terminal Information report to view the details of each terminal at a site.

Opening the Terminal Information report

To open the Terminal Information report:

1. Press  **Company** from the menu bar.
2. Press **Site > Control > Terminal Information**.



The Terminal Information report is displayed.

Terminal Details

Nam	Site	Store #	Com	Term #	Last Contr	Last Sale	Last Journ	Disk Spac (M)	Versi	Rem IP	Loca IP	Pend Ports >Ten	Laptc	Web	Term Type
AMC 1	3	AMC Futu Mast - [-1]	Philli	10	18/1/10 4:			3733	B3.0	123.5	192.144				Norm
AMC 1	3	AMC IPad Mast - [-1]	Jacq	14	9/01/17:11					110.2					PAD
AMC 1	3	AMC Base Mast Stati [-1]	PI2 (40)	40	9/01/17:11			3721	B3.0	110.2	10.33				Base Stati
AMC 1	3	AMC HP Mast Lapt [-1]		5	5/01/23:21	4/05/20:0:	112	4247	4.152	110.2	10.33				Norm

States

All >

Site

All >

By

Current >

Type

Terminal >

Add to Favourites

Terminal Information report key fields

Filters area

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

Field	Description
<input type="button" value="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.
States	Select a state or county to filter the report by.
By	Select to filter the report to only terminals currently active, or to view all terminals.

Field	Description
Type	Select to filter the report by terminal type:
Terminal	Normal Point of Sale terminals.
Laptop	Terminals that are laptops.
Vision	Terminals that are used for Vision displays.
WebCam	Terminals that have web-enabled cameras.
Base Station	Base stations.
Base Station / Vision	Terminals that are base stations that run vision displays.
PAD	Terminals that are iOS or Android devices.
PDT	Terminals that are Portal Data Terminal devices.
All	All terminals.

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 / Name	The name of the relevant site.
Site # / Site	The site code of the relevant site.
Company	The name of the relevant company.
Store #	Location number at the site.
Terminal	Name of the terminal.
#	Unique code of the terminal.
Last Connection	Date the terminal last connected to the site.
Last Sale	Date of the most recent sale from this terminal.

Field	Description
Last Journal	Journal number of the last transaction on this terminal.
Disk Space	Disk space on the terminal (megabytes)
Version	Version of the Point of Sale software the terminal is running. This may be POSPortal, iZen Point of Sale or a third party Point of Sale.
Remote IP	The external IP address of this terminal.
Local IP	The internal IP address of this terminal.
Pending Portal -> Terminal	Number of updates pending from the portal to the terminals at this site.
Laptop	Indicates whether this terminal is a laptop.
WebCam	Indicates whether this terminal has a web-enabled camera.
Terminal Type	Type of terminal, for example a base station or regular Point of Sale terminal.

Managing tenders

You can create tender types with complex rules to control how different types of payment are treated by your Point of Sale.

See:

- *Tender Maintenance screen* on page 341.
- *Tenders report* on page 350.


What you can do:

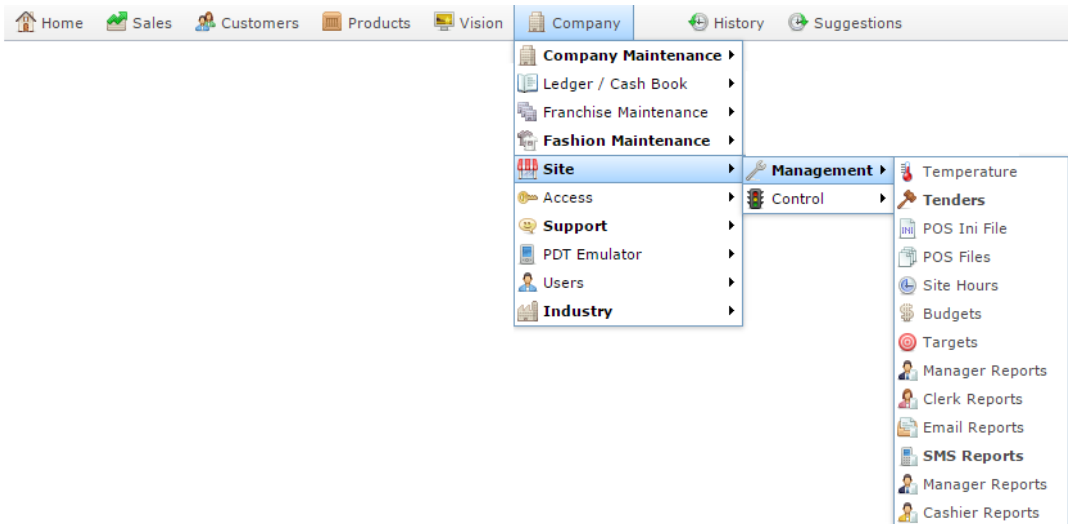
- *Creating a new tender type* on page 314
- *Editing a tender type* on page 316.
- *Editing a tender type to add a floor limit* on page 318.
- *Editing a tender type to add a message to operators* on page 320.
- *Editing a tender type to limit cashout* on page 322.
- *Editing a tender type to add a minimum purchase amount* on page 324.
- *Editing a tender type to prevent refunds* on page 326.
- *Editing a tender type to prevent voids* on page 329.
- *Editing a tender type to require supervisor authorisation* on page 332.
- *Editing a tender type to add a surcharge* on page 335.
- *Deactivating a tender type* on page 337.
- *Deleting a tender type* on page 339.

Creating a new tender type

Create a new tender type to allow customers to pay at the Point of Sale using this tender type, or apply specific rules to a tender type. For example, to apply a credit card surcharge to particular credit card types.

To create a new tender type:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report


Descr	ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Incren To	Allow To Refun	Requi Super	Requi Super For Refun	Allow To Void	Open Drawe	Extern
Accou	6	✓	\$100	\$100	-			\$0.00	✓			✓		Debto
Amex	5	✓	\$1.00	\$1.00	\$0.00			\$0.05	✓	✓	✓	✓		
CASH	1	✓	\$10.0	\$10.0	-	✓	✓	\$0.05	✓			✓	✓	

Site

AMC

Add to Favourites

Create Tender

3. Press .

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: Tender Number:

Details

POS Tender Description: In Use Table Tender In Use

Table Tender Description:

Type:

Maximum Limit:

Floor Limit:

Minimum Limit:

Maximum Cashout:

Rounding Increment:

Surcharge:

Surcharge Tax Rate:

Surcharge Department:

Group:

Ledger #:

Bank Account:

Drop Alarm:

Message

4. Select the site you want to create a tender for in the **Site** drop-down field.
5. Type a unique code to identify the tender in the **Tender Number** field.
6. Type the description to display on the Point of Sale in the POS Tender Description field.
7. Select the type of tender in the **Type** drop-down field.
8. Set the other rules and restrictions as required.

See *Tender Maintenance screen* on page 341.


9. Press .

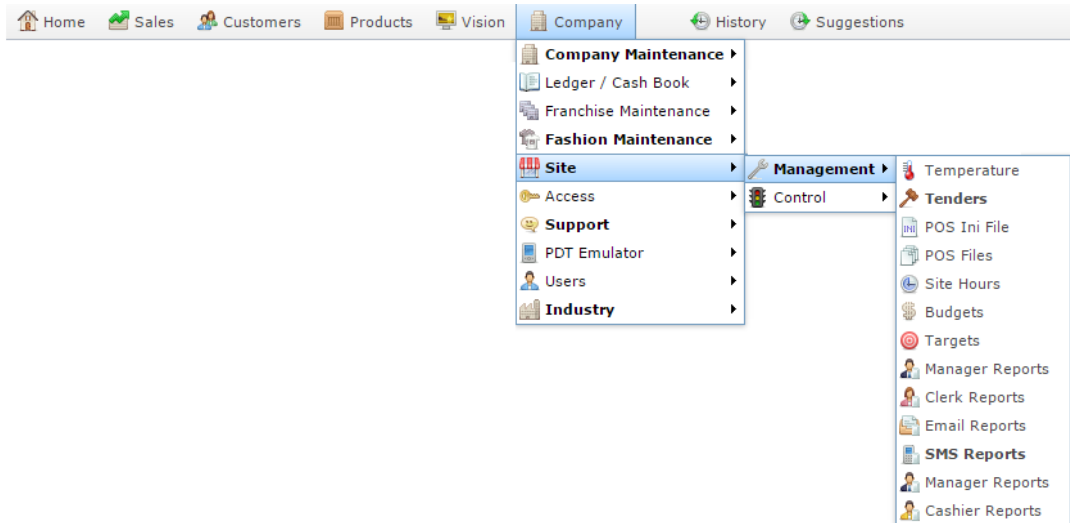
The tender is created.

Editing a tender type

Edit a tender type to change the rules and restrictions it obeys.

To edit a tender type:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Inccr	Allow To Refun	Requi Super For Refun	Requi Super To Void	Open Drawe	Extern
Accou	6	✓	\$100	\$100	-			\$0.00	✓		✓		Debto
					\$1,000								
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓	✓	✓	✓	
CASH	1	✓	\$10.0	\$10.0	-	✓	✓	\$0.05	✓		✓	✓	
					\$100.0								

Site

AMC

Add to Favourites

Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

New Delete Save

4. Edit the fields as required.

See *Tender Maintenance* screen on page 341.


5. Press .

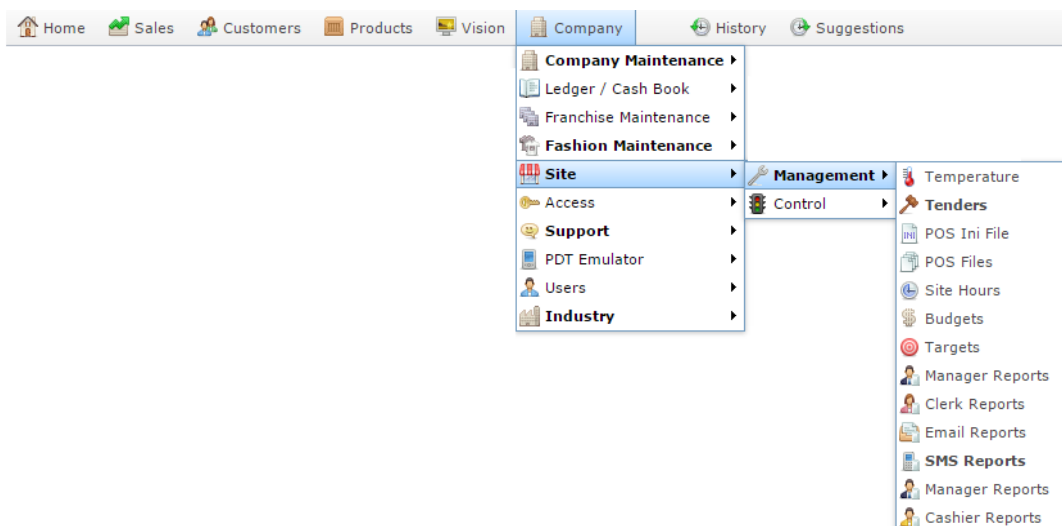
The changes are saved.

Editing a tender type to add a floor limit

Add a floor limit to specify the maximum amount a Point of Sale operator can accept from one tender type without requiring supervisor authorisation. This helps prevent loss in case of fraud, as operators are prevented from accepting excessively large amounts of a risky tender type.

To add a floor limit:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Incer	Allow To Refun	Requi Super	Requi Super For Refun	Allow To Void	Open Drawe	Extern
Accou	6	✓	\$100	\$100	-			\$0.00	✓			✓		Debto
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓		✓	✓	✓	
CASH	1	✓	\$10,0	\$10,0	-	✓	✓	\$0.05	✓			✓	✓	

Site

AMC

Add to Favourites

Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

New Delete Save

4. Type the maximum amount that can be accepted of this tender in a single transaction without supervisor authorisation in the **Floor Limit** field.

See *Tender Maintenance screen* on page 341.


5. Press .

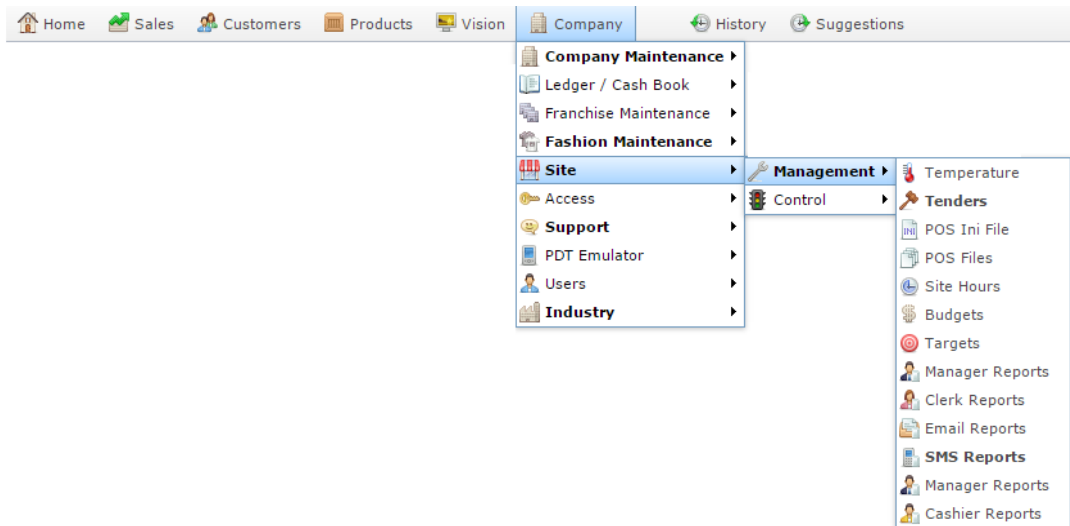
The changes are saved.

Editing a tender type to add a message to operators

Add a drop notification to automatically create a message when a tender type over a certain amount is received. For example, to remind Point of Sale operators to perform a handover after a large cash sale.

To add a notification:

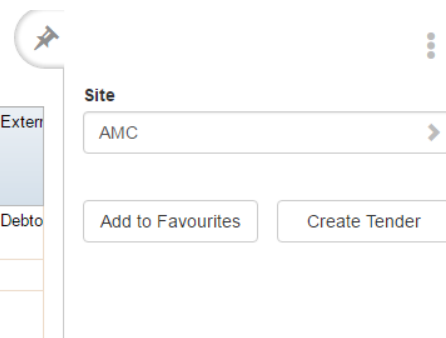
1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxin Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Increm	Allow To Refun	Requi Super For Refun	Requi Super To Void	Open Drawe	Extern
Accou	6	✓	\$100	\$100	-			\$0.00	✓		✓		Debto
					\$1,000								
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓	✓	✓	✓	
CASH	1	✓	\$10,0	\$10,0	-	✓	✓	\$0.05	✓		✓	✓	
					\$100.0								



3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message


4. Type the minimum amount above which the message should be displayed in the **Drop Alarm** field. For example, if a sale over \$500 should prompt the operator to clear the till, type **500**.
5. Type the message to display to the operator in the **Message** field.
See *Tender Maintenance* screen on page 341.
6. Press .
The changes are saved.

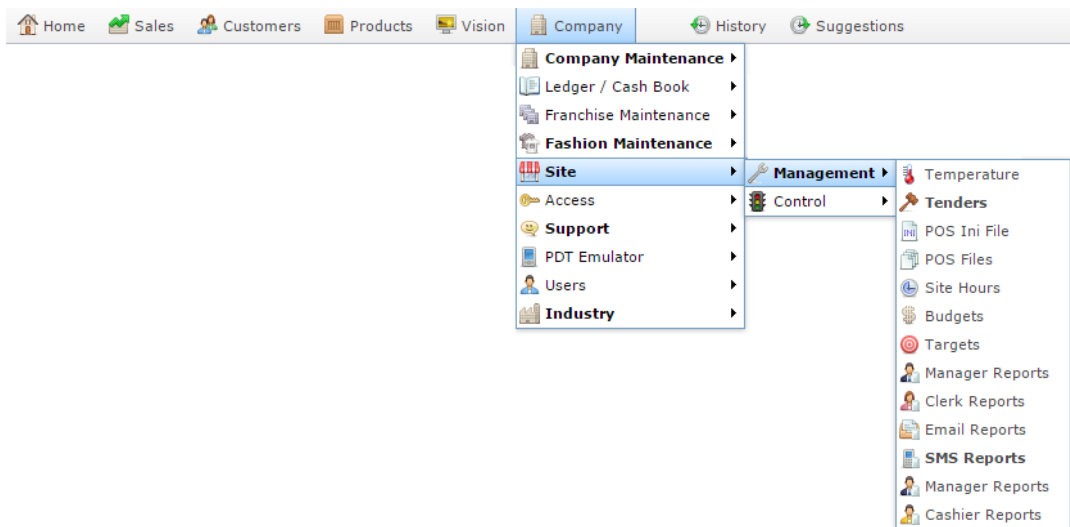
Editing a tender type to limit cashout

Limit a tender type's cashout to help control the flow of physical cash in your sites, by preventing any one customer from claiming too much cash from the tills.

Tip: You can prevent a tender from allowing cashout by clearing the **Cash Out** field in the Control tab of Tender Maintenance.

To add a cashout limit:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Incer	Allow To Refun	Requi Super For	Requi Super Void Refun	Allow To Void	Open Drawe	Extern
Accou	6	✓	\$100	\$100	-			\$0.00	✓			✓		Debt
					\$1,000									
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓	✓	✓	✓		
CASH	1	✓	\$10,0	\$10,0	-	✓	✓	\$0.05	✓			✓	✓	
					\$100.0									

Site

AMC

Add to Favourites

Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

New Delete Save

4. Type the maximum amount of cash in the **Maximum Cashout** field.

See *Tender Maintenance* screen on page 341.

5. Press .

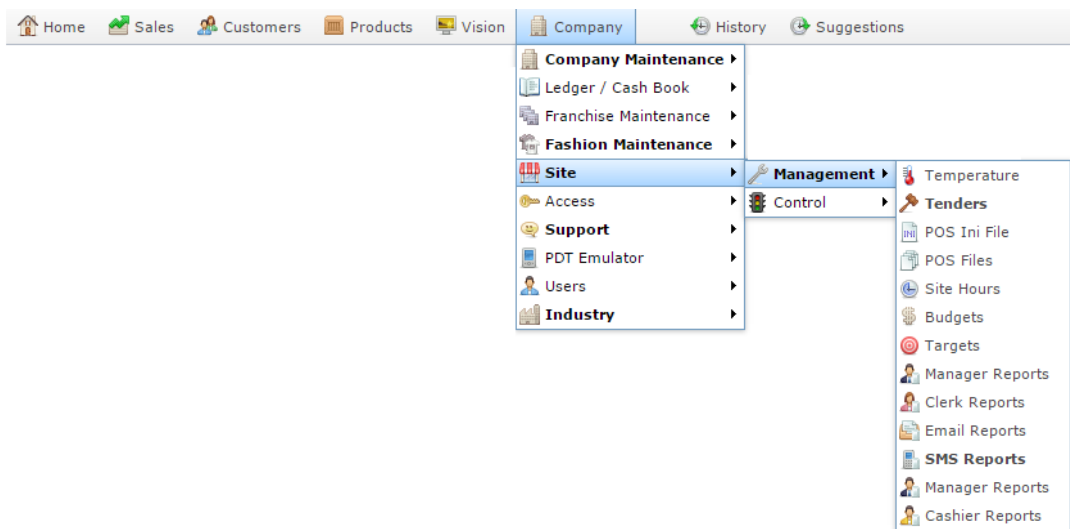
The changes are saved.

Editing a tender type to add a minimum purchase amount

Add a minimum purchase amount to restrict a tender type to purchases over a set amount. For example, to ensure EFTPOS is only used for purchases of \$10 or over, so that processing fees do not consume too much of a transaction.

To add a minimum purchase amount:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Incer	Allow To Refun	Requi Super	Requi Super For Refun	Allow To Void	Open Drawe	Extern
Accou	6	✓	\$100	\$100	-			\$0.00	✓			✓		Debto
					\$1,000									
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓	✓	✓	✓		
CASH	1	✓	\$10,0	\$10,0	-	✓	✓	\$0.05	✓			✓	✓	
					\$100.0									

Site

AMC

Add to Favourites

Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

New Delete Save

4. Type the minimum purchase amount in the **Minimum Limit** field.

See *Tender Maintenance* screen on page 341.

5. Press .


The changes are saved.

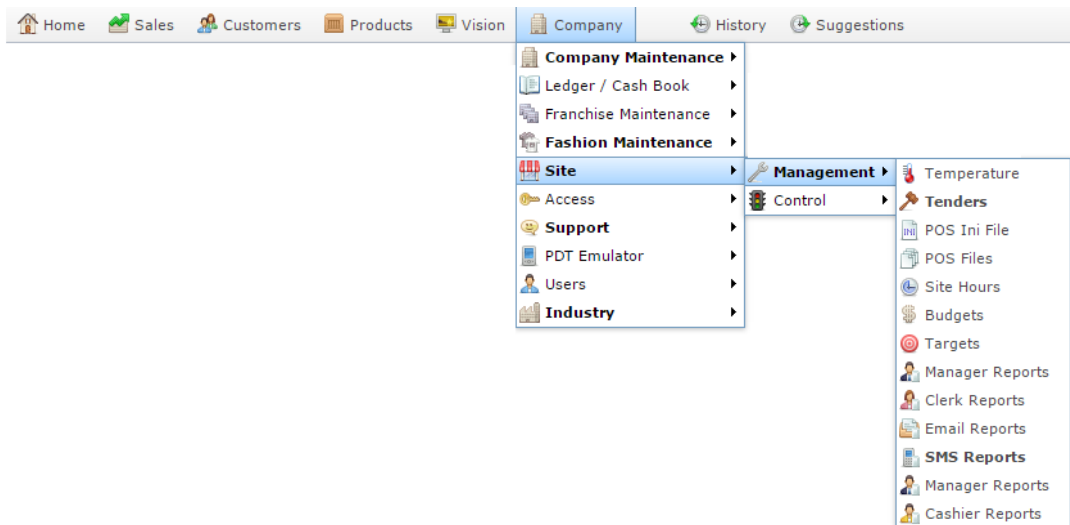
Editing a tender type to prevent refunds

Prevent refunds of a tender type so that your Point of Sale cannot try to create a refund in a type that you are not capable of supplying. For example, a shopping centre voucher that must be refunded as cash.

Note: You can also enforce supervisor authorisations for refunds of a tender type by selecting the **Require Supervisor for Refunds** field in the Control tab.

To disable refunds for a tender type:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Inccr	Allow To Refun	Requi Super	Requi Super For Refun	Allow To Void	Open Drawe	Extern
Accou	6	✓	\$100	\$100	-			\$0.00	✓			✓		Debto
					\$1,000									
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓	✓	✓	✓		
CASH	1	✓	\$10,0	\$10,0	-	✓	✓	\$0.05	✓			✓	✓	
					\$100.0									

Site

AMC

Add to Favourites

Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

New Delete Save

4. Press the Control tab.

The Control tab is displayed.

Tenders for AMC

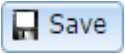
Site: AMC Tender: 6

Details Control External

Allow Over Tender
 Require Supervisor
 Require Supervisor For Refunds
 Refund as Cash
 Enable Rounding
 Open Drawer
 Cash Out
 Allowed To Void
 Allow To Refund
 Collect Card Details
 Must Authorise
 Ignore Expiry Date
 Validate Card

New Delete Save

See *Tender Maintenance* screen on page 341.

5. Select the tender type that refunds for this tender should be processed as instead in the **Refund as** drop-down list. For example, refund a shopping centre voucher as cash.
6. Clear the **Allow To Refund** field.
7. Press .


The changes are saved.

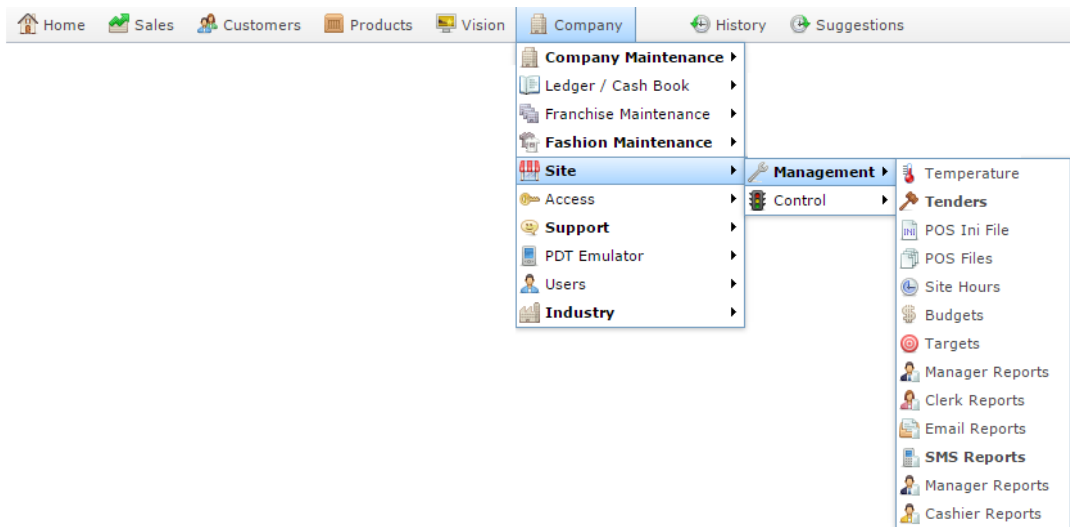
Editing a tender type to prevent voids

Prevent voids if voiding a particular tender type after it is submitted could cause security or balancing issues. For example, if a payment must be processed to be accepted by the Point of Sale.

Note: If an operator makes a mistake with a non-voidable tender, they must void the entire transaction and create it again.

To disable voids for a tender type:

1. Press  Company in the main menu bar.
2. Press Site > Management > Tenders.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Incren	Allow To Refun	Requi Super	Requi Super For Refun	Allow To Void	Open Drawe	Extern
Accou	6	✓	\$100,	\$100,	-			\$0.00	✓			✓		Debto
					\$1,000									
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓	✓	✓	✓		
CASH	1	✓	\$10,0	\$10,0	-	✓	✓	\$0.05	✓			✓	✓	
					\$100.0									

Site

AMC

Add to Favourites Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

New Delete Save

4. Press the Control tab.

The Control tab is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

Allow Over Tender
 Require Supervisor
 Require Supervisor For Refunds
 Refund as Cash
 Enable Rounding
 Open Drawer
 Cash Out
 Allowed To Void
 Allow To Refund
 Collect Card Details
 Must Authorise
 Ignore Expiry Date
 Validate Card

New Delete Save

See *Tender Maintenance* screen on page 341.

5. Clear the **Allowed To Void** field.


6. Press  Save.

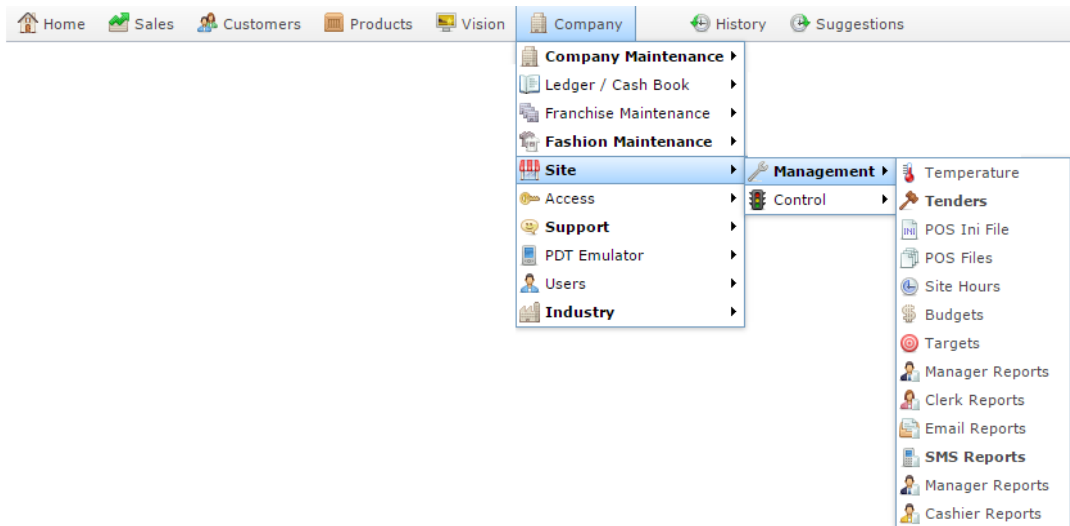
The changes are saved.

Editing a tender type to require supervisor authorisation

Add a supervisor authorisation requirement to a tender if you want to ensure operators cannot process a particular tender without a manager's consent. For example, if a tender type is considered at high risk of fraud, or is not usually accepted but still available.

To require a supervisor authorisation:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxin Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Incer	Allow To Refun	Requi Super For Refun	Requi Super To Void	Open Drawe	Extern
Accou	6	✓	\$100,	\$100,	-			\$0.00	✓		✓		Debto
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓	✓	✓	✓	
CASH	1	✓	\$10,0	\$10,0	-	✓	✓	\$0.05	✓		✓	✓	

Site

AMC

Add to Favourites Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

New Delete Save

4. Press the Control tab.

The Control tab is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

Allow Over Tender
 Require Supervisor
 Require Supervisor For Refunds
 Refund as Cash
 Enable Rounding
 Open Drawer
 Cash Out
 Allowed To Void
 Allow To Refund
 Collect Card Details
 Must Authorise
 Ignore Expiry Date
 Validate Card

New Delete Save

See *Tender Maintenance* screen on page 341.

5. Select the **Require Supervisor** field.


6. Press  Save.

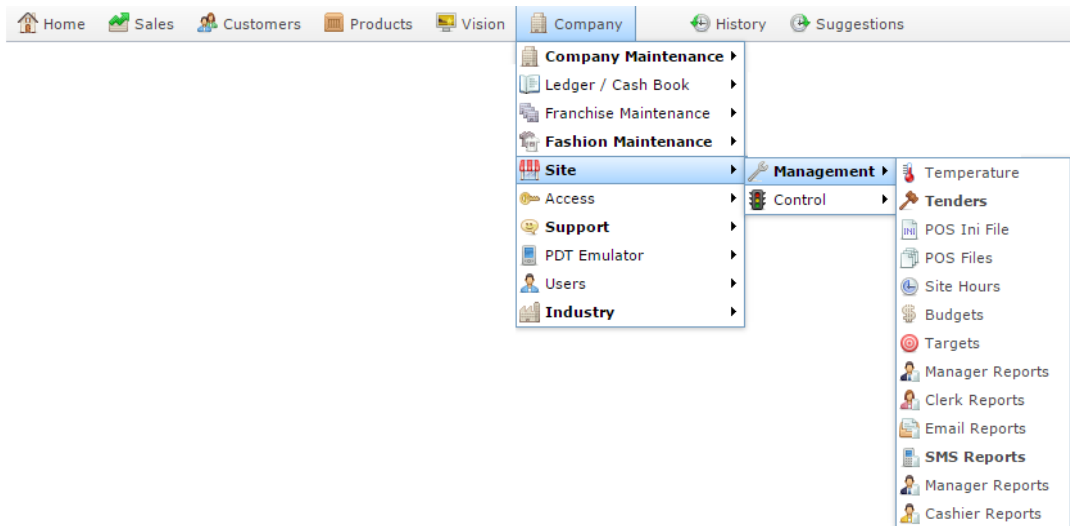
The changes are saved.

Editing a tender type to add a surcharge

Add a surcharge to a tender type so the Point of Sale automatically adds a small amount to cover the cost of processing this payment. For example, to cover the merchant charges for processing credit cards.

To add a surcharge to a tender type:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxim Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Increm	Allow To Refun	Requi Super For Refun	Requi Super To Void	Open Drawe	Extern
Accou	6	✓	\$100	\$100	-			\$0.00	✓		✓		Debto
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓	✓	✓	✓	
CASH	1	✓	\$10,0	\$10,0	-	✓	✓	\$0.05	✓		✓	✓	

Site

AMC

Add to Favourites

Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

New Delete Save

4. Type the percentage you want to add as a surcharge in the **Surcharge** field. For example, to add a 2% surcharge, type 2.

Note: You cannot add a flat-rate surcharge.

5. If surcharges attract a tax, type the rate at which the surcharge should be taxed in the **Surcharge Tax Rate** field.

See *Tender Maintenance screen* on page 341.


6. Press .

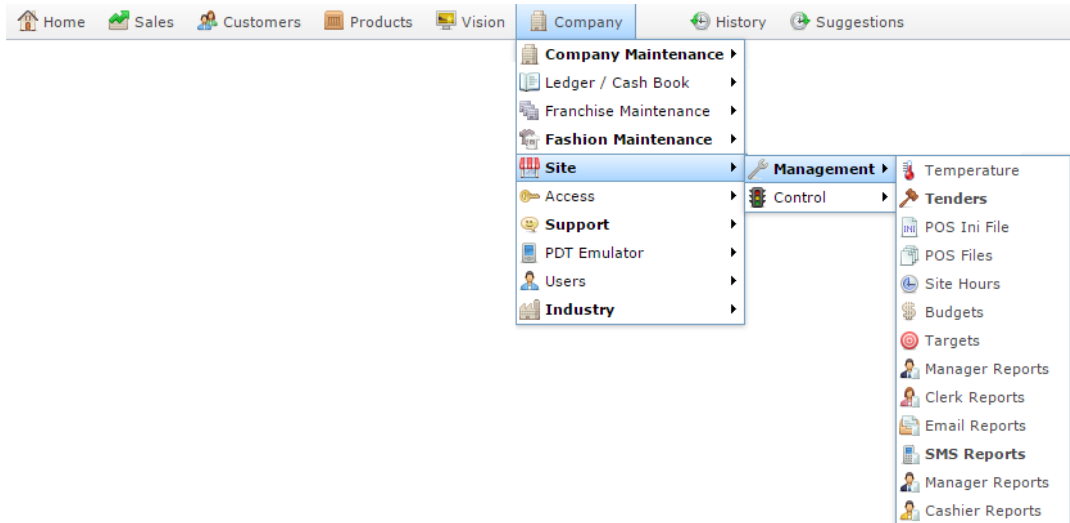
The changes are saved.

Deactivating a tender type

Deactivate a tender type to remove it from the Point of Sale without deleting the tender type.

To deactivate a tender type:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Inccr	Allow To Refun	Requi Super	Requi Super For Refun	Allow To Void	Open Drawe	Extern
Accou	6	✓	\$100	\$100	-			\$0.00	✓			✓		Debto
					\$1,000									
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓		✓	✓	✓	
CASH	1	✓	\$10.0	\$10.0	-	✓	✓	\$0.05	✓			✓	✓	
					\$100.0									

Site

AMC

Add to Favourites

Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

New Delete Save

4. Clear the **In Use** field.

See *Tender Maintenance* screen on page 341.

5. Press .

The tender is deactivated.


Deleting a tender type

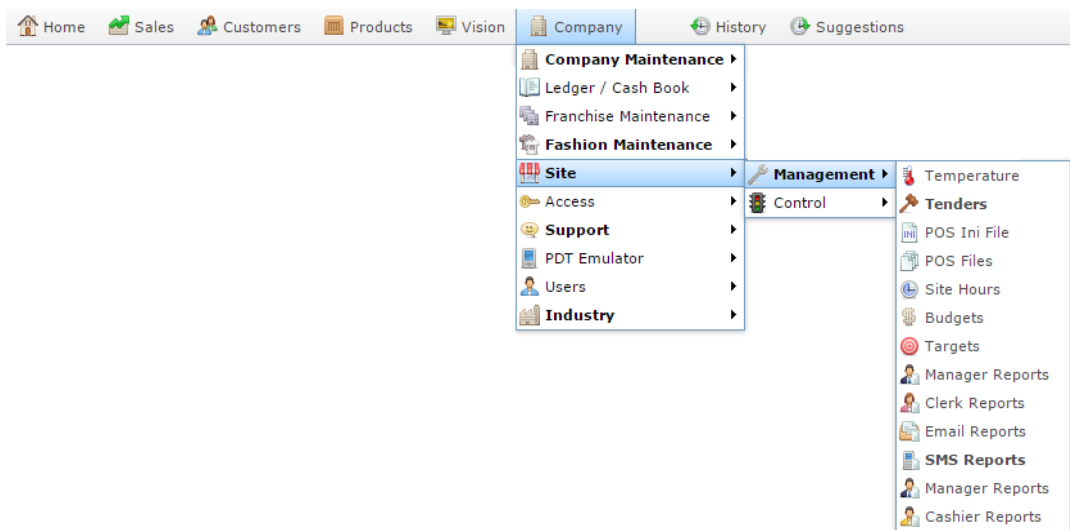
Delete a tender type to remove it from the Portal.



Important note: Only delete a tender type that has never been used. All tender history will be deleted. If you do not want a tender type to be used any more, remove it from the Point of Sale. See *Deactivating a tender type* on page 337.

To delete a tender type:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Descr	ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Inccr	Allow To Refun	Requi Super Refun	Requi Super For Void	Allow To Drawe	Open	Extern
Accou	6	✓	\$100,	\$100,	-			\$0.00	✓			✓		Debto
Amex	5	✓	\$1,00	\$1,00	\$0.00			\$0.05	✓	✓	✓	✓		
CASH	1	✓	\$10,0	\$10,0	-	✓	✓	\$0.05	✓			✓	✓	

Site

AMC

Add to Favourites

Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

POS Tender Description: Accounts In Use Table Tender In Use

Table Tender Description: Accounts

Type: Credit Card

Maximum Limit: \$100,000

Floor Limit: \$100,000

Minimum Limit: -\$1,000

Maximum Cashout: \$0

Rounding Increment: 0

Surcharge: 0%

Surcharge Tax Rate: 0%

Surcharge Department: Surcharge Department

Group: 6

Ledger #:

Bank Account: Main Cheque Book

Drop Alarm: 0

Message

4. Press .


The tender is deleted.

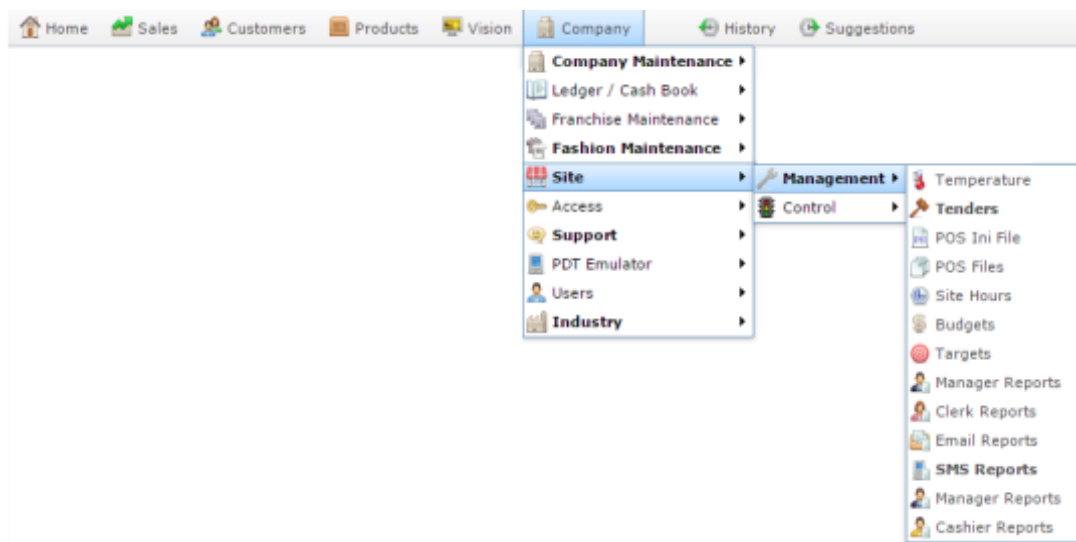
Tender Maintenance screen

Use this screen to create and maintain the rules by which different tenders can operate on your Point of Sale. For example, whether credit cards attract a surcharge, or the maximum amount of cash you will accept.

Opening the Tender Maintenance screen

To open the Tender Maintenance screen:

1. Press  Company in the main menu bar.
2. Press Site > Management > Tenders.



The Tenders report is displayed.

Tenders Report

Descr ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Round Increm	Allow To Refun	Requi Super For	Requi Super Void	Allow To Draw	Open Draw	Extern
Accoi	6	✓	\$100	\$100	-			\$0.00	✓		✓		Debit
Amex	5	✓	\$1.00	\$1.00	\$0.00			\$0.05	✓	✓	✓	✓	
CASH	1	✓	\$10.0	\$10.0	-	✓	✓	\$0.05	✓		✓	✓	

Site: AMC

Buttons: Add to Favourites, Create Tender

3. Press the tender you want to view.

The Tender Maintenance screen is displayed.

Tenders for AMC

Site: Tender:

POS Tender Description: In Use Table Tender In Use
 Table Tender Description:

Type:

Maximum Limit:

Floor Limit:

Minimum Limit:

Maximum Cashout:

Rounding Increment:

Surcharge:

Surcharge Tax Rate:

Surcharge Department:

Group:

Ledger #:

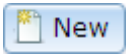

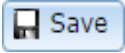
Bank Account:

Drop Alarm:

Message

Tender Maintenance screen key fields and buttons

Common fields and buttons

Field	Description
Site	Select the site the tender applies to.
Tender	Select the unique code of the tender you want to edit.
 New	Press to create a new tender.
 Delete	Press to delete this tender.
 Save	Press to save changes to this tender.

Details tab

Use this field to define the rules applied to this tender, and how the Portal should treat it.

The screenshot shows a software window titled "Tenders for AMC". At the top, there are dropdown menus for "Site" (set to "AMC") and "Tender" (set to "6"). Below these are three tabs: "Details" (selected), "Control", and "External". The "Details" tab contains several input fields and checkboxes. "POS Tender Description" and "Table Tender Description" are both set to "Accounts". "Type" is set to "Credit Card". "Maximum Limit", "Floor Limit", and "Minimum Limit" are set to "\$100,000", "\$100,000", and "-\$1,000" respectively. "Maximum Cashout" is set to "\$0", "Rounding Increment" to "0", "Surcharge" to "0%", and "Surcharge Tax Rate" to "0%". "Surcharge Department" is set to "Surcharge Department". "Group" is set to "6". "Ledger #" is empty. "Bank Account" is set to "Main Cheque Book". "Drop Alarm" is set to "0". There is a "Message" field which is currently empty. On the right side of the form, there are two checkboxes: "In Use" (checked) and "Table Tender In Use" (unchecked). At the bottom right of the window, there are three buttons: "New", "Delete", and "Save".

Field

Description

POS Tender Description

The description that appears on the Point of Sale tender buttons.

Table Tender Description

The description that appears on the Point of Sale tender buttons during table service.

Type

Select the type of tender.

Field	Description
Maximum Limit	Select maximum amount a customer can pay with this tender in a single transaction.
Floor Limit	Select the maximum amount a customer can pay with this tender without supervisor authorisation.
Minimum Limit	Select the minimum transaction amount that can be paid with this tender.
Maximum Cashout	Select the maximum amount the customer can withdraw via cash out using this tender.
	<p>Note: If you want to disable cash out for this tender, see the Control tab.</p>
Rounding Increment	Select the increment the tender is rounded to. For example, if the smallest increment of your cash currency is 5 cents, type .05 for the cash tender.
Surcharge	Type the percentage surcharge applied to this tender. For example, some credit cards may attract a 2% surcharge to cover the merchant fees.
Surcharge Tax Rate	Type the percentage rate of tax to be applied to the tender surcharge.
Surcharge Department	Select the department the tender surcharge should be applied to.
Group	Add tenders together.

Field	Description
Ledger #	Type the unique code identifying the ledger that payments in this tender should be allocated to.
Bank Account	Select the bank account that payments of this tender should be recorded in.
Drop Alarm	Type the limit at which the Point of Sale should display a message to the operator to perform a handover.
Message	Type the message to display to the operator for the drop alarm.
In Use	Select to allow this tender to be used at Point of Sale terminals.
Table Tender In Use	Select to allow this tender to be used for table service Point of Sale terminals.

Control tab

Use this tab to define the Point of Sale rules for the tender, such as whether it opens the cash drawer or requires supervisor authorisation.

Tenders for AMC

Site: AMC Tender: 6

Details Control External

- Allow Over Tender
- Require Supervisor
- Require Supervisor For Refunds
- Refund as Cash
- Enable Rounding
- Open Drawer
- Cash Out
- Allowed To Void
- Allow To Refund
- Collect Card Details
- Must Authorise
- Ignore Expiry Date
- Validate Card

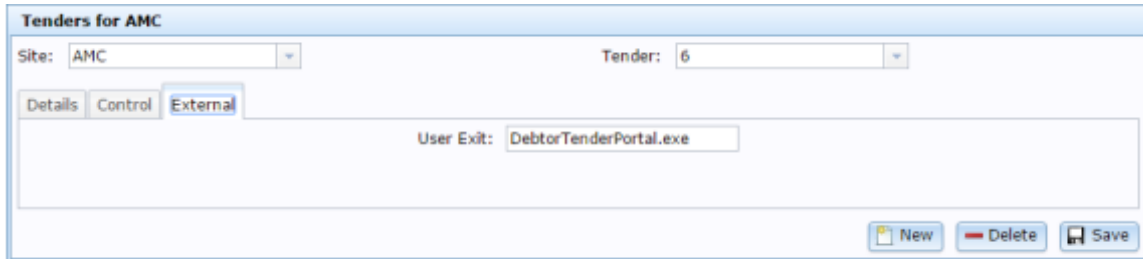
New Delete Save

Field	Description
Allow Over Tender	Select to allow customers to over pay with this tender. Their overpayment is returned as a refund. For example, cash tenders are usually allowed to overtender, and the operator returns the overage as change. Credit cards and EFTPOS tenders are not usually allowed to pay more than the owed amount.
Require Supervisor	Select to require a supervisor's authorisation to process the payments in this tender.
Require Supervisor For Refunds	Select to require a supervisor authorisation to process refunds in this tender.

Field	Description
Refund as	<p>Select the tender to process refunds in. Typically this is used to ensure refunds are paid to the same tender they were paid with.</p> <p>You can also redirect a refund to another payment method if the tender is a type your Point of Sale cannot create, such as shopping centre vouchers.</p>
Enable Rounding	<p>Select to allow this tender to round totals using the rounding figure in the Details tab.</p>
Open Drawer	<p>Select to open the cash drawer when this payment is tendered.</p>
Cash Out	<p>Select to permit the customer to nominate a cash out amount with this tender.</p>
Allowed To Void	<p>Select if this tender can be voided on the Point of Sale.</p>
Allowed To Refund	<p>Select if this tender can be refunded.</p>
Collect Card Details	<p>Select to collect the customer's loyalty card details when this tender is used.</p>
Must Authorise	<p>Select to only accept this tender if the authorisation process is completed.</p>
Ignore Expiry Date	<p>Select to ignore the expiry dates on this tender. For example, to ignore the expiry dates of credit vouchers.</p>
Validate Card	<p>Select to confirm the CRC is correct.</p>

External tab

Use this tab to define additional functions the Portal fires when this tender is used.



The screenshot shows a window titled "Tenders for AMC". At the top, there are two dropdown menus: "Site:" with "AMC" selected and "Tender:" with "6" selected. Below these are three tabs: "Details", "Control", and "External", with "External" being the active tab. The main area of the window contains a text field labeled "User Exit:" with the value "DebtorTenderPortal.exe" entered. At the bottom right, there are three buttons: "New", "Delete", and "Save".

Field	Description
User Exit	Use this to fire an external function after this tender is used.

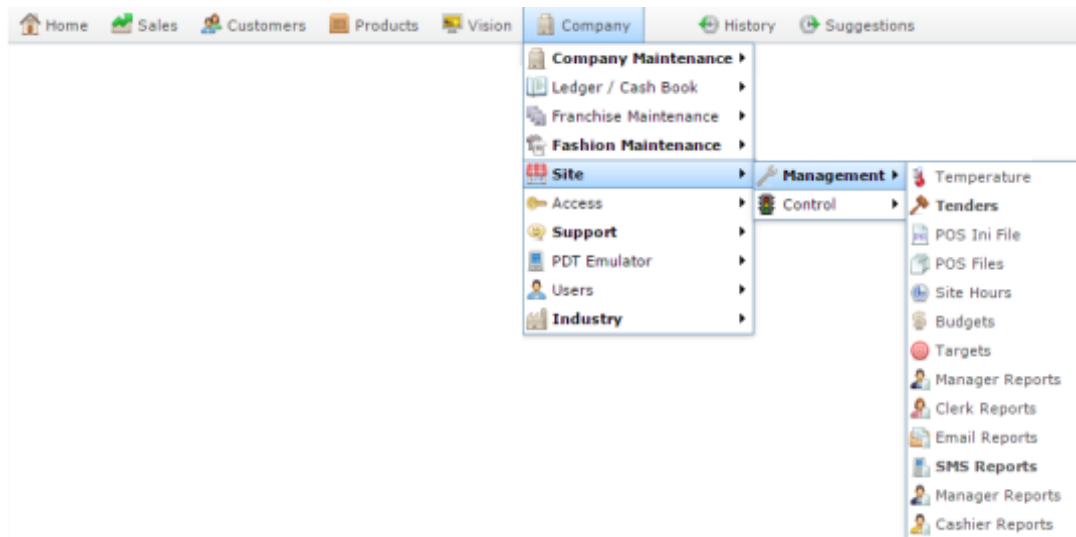
Tenders report

Use the Tenders report to view the tender types available per site.

Opening the Tenders report

To open the Tenders report:

1. Press  **Company** in the main menu bar.
2. Press **Site > Management > Tenders**.



The Tenders report is displayed.

Tenders Report

Site: AMC

Add to Favourites Create Tender

Descr ID	In Use	Maxir Limit (\$)	Floor Limit (\$)	Minim Limit (\$)	Allow Over Tende	Enabl Rounc	Rounc Incer	Allow To Refun	Requi Super For	Requi Super Void	Allow To	Open Draw	Extern
Accoi	6	✓	\$100	\$100	-		\$0.00	✓			✓		Deblo
Amex	5	✓	\$1.00	\$1.00	\$0.00		\$0.05	✓	✓	✓	✓		
CASH	1	✓	\$10.0	\$10.0	-	✓	\$0.05	✓			✓	✓	

Tenders report key fields

Filters area

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

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
<input type="button" value="Create Tender"/>	Press to create a new tender type.
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
Description	The description that appears on the Point of Sale tender buttons.
ID	Unique code identifying the tender type.
In Use	This tender can be used at Point of Sale terminals.
Maximum Limit	The maximum amount a customer can pay with this tender in a single transaction.
Floor Limit	The maximum amount a customer can pay with this tender without supervisor authorisation.
Minimum Limit	The minimum transaction amount that can be paid with this tender.

Field	Description
Allow Over Tender	<p>Customers can over pay with this tender. Their overpayment is returned as a refund.</p> <p>For example, cash tenders are usually allowed to over tender, and the operator returns the overage as change. Creditcards and EFTPOS tenders are not usually allowed to pay more than the owed amount.</p>
Enable Rounding	The tender rounds to the rounding increment indicated.
Rounding Increment	The increment the tender is rounded to. For example, if the smallest increment of your cash currency is 5 cents, the Rounding Increment is .05.
Allowed To Refund	This tender can be refunded.
Require Supervisor	Require a supervisor's authorisation to process payments in the tender.
Require Supervisor For Refunds	Require a supervisor authorisation to process refunds in this tender.
Allowed To Void	This tender can be voided on the Point of Sale.
Open Drawer	Open the cash drawer when this payment is tendered.

Field	Description
External	The Portal subsystem this tender type connects to. For example, a debtor account tender connects to the Portal debtor system.

Glossary

Account

An account is a general ledger structure that categorises particular kinds of income or expenditure for financial reports.

Advertising label

An advertising label is a large label designed to advertise the price of an item.

Appointment (Scheduler)

An appointment is an entry for a customer in the Scheduler that represents one or more specific services scheduled at a particular time for the customer. It can be retrieved by the Point of Sale and added to a transaction. Appointments can be rescheduled, cancelled or duplicated.

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.

Bonus loyalty points

Bonus loyalty points are additional loyalty points accrued for certain activities, such as purchasing particular items, or participating in a promotion. Bonus points are accrued in addition to regular loyalty points.

Bulk discount

A bulk discount is a discount on the purchase price that is offered when a certain number of units or weight of an item is purchased in a single transaction. An item can have different discount amounts depending on the number or amount purchased.

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 contract

A creditor contract is an agreement between your company and a creditor or supplier to supply a set quantity of an item at a set price for a set period of 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 on the iZen Point of Sale 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.

A customer on the Portal is a person who has interacted with your company in some way: they may have signed up for a loyalty member, ordered items from your company, opened a debtor account, requested a quote or has some other kind of interaction that created a customer account with their details in the Portal system. A customer may also be a loyalty member, marketing member or a debtor.

Debtor

A debtor is a customer who has been extended a line of credit by your organisation: they are allowed to owe a certain amount of money (up to their credit limit) to your organisation with the agreement the amount is paid off before a set period of time, which allows them to buy large quantities of goods, or buy items frequently and make payments at a later time. Customer orders that have not yet been collected or completed are not counted as "money owed". Customer accounts are separate from debtor accounts, and not all customers are debtors.

Debtor balance

A debtor balance is the amount a debtor currently owes your organisation. This amount only includes finalised transactions that have been added to the debtor's account for future payment, and does not include orders that have not been completed or collected yet.

Debtor contract

A debtor contract is an agreement between your company and a debtor, where they can purchase a set quantity of an item at a set price for a set period of time.

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 cost level

A department cost level is a rule used by the Portal to automatically calculate prices for items within a certain cost bracket, according to how much they cost. For example, items below \$5 might be priced at 2 x cost. Items between \$5 and \$10 might be priced at 1.8 x cost.

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, depending on their privileges and account status.

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.

Family card

A family card is a loyalty card that is linked to the loyalty cards of other customers who are immediate family members. Family cards may share loyalty points.

Fixture

A fixture is a physical structure or defined 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.

Frequent shopper item

A frequent shopping item is an item that gives loyalty members additional loyalty rewards for purchasing it.

Gambling machine

A gambling machine is a single, specific machine at a gambling venue, such as a slot machine.

Gambling session

A gambling session is a period of continuous gambling.

Gambling spin

A gambling spin is a single instance of betting, for example betting on one round of a slot machine.

Gambling venue

A gambling venue is a place that provides gambling machines for customers to use. A venue may have multiple gambling machines.

Global price change

A global price change is an instruction to change the price of an item in the future, either at a single site, or across several sites at the same time.

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.

GSA card

A GSA (Gambler's Subtle Assist) card is a card that anonymously identifies a gambling customer to the Portal, and helps prevent problem gambling by allowing a customer to set limits to their gambling time, periods and amounts.

Home delivery

Home delivery is a feature that allows customers to order their items online, over a phone or by mail, and have them delivered to their house.

Interest rate

An interest rate dictates the amount of interest that is charged on overdue debts by your company.

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 group

An item group is a group of items created for reporting purposes. For example, items that are frequently sold in an impulse purchase fixture. Items can belong to multiple groups.

Item label

An item label is a label with price and barcode information for that item. It is usually attached to each unit of the item, whereas a shelf label provides a single label to describe all units of that item on the shelf.

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 type

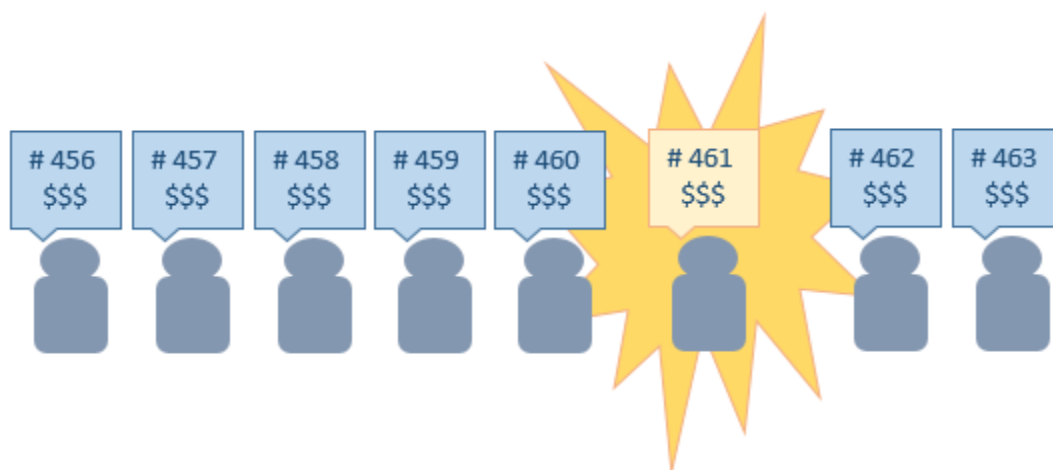
An item type is a way of categorising items for reporting purposes. Items can have only one type.

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.

Jackpot

A jackpot is a prize of loyalty points that accrue over a period from eligible transactions that are awarded to a randomly-selected transaction.



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 or a nearby fixture 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.

Layby

A layby is a transaction where a customer commits to purchase a selection of items at a future date. The customer must pay the full balance by the due date or forfeit the items. The site commits to set the items aside for the customer, so they can be collected when the layby is paid in full. Depending on the company policy, laybys may incur additional setup fees, or require the customer to pay a minimum deposit when opening the layby.

Laybys can only be created and paid for through the Point of Sale, and can only be edited or cancelled on the Portal. Layby collection is not recorded.

Loyalty

Loyalty is a system to encourage customers to return to your organisation. For example, by:

- Offering discounts on purchases.
- Offering exclusive promotions.
- Allocating points for each purchase that can be redeemed on future purchases.

Loyalty is configured for your organisation on the Portal.

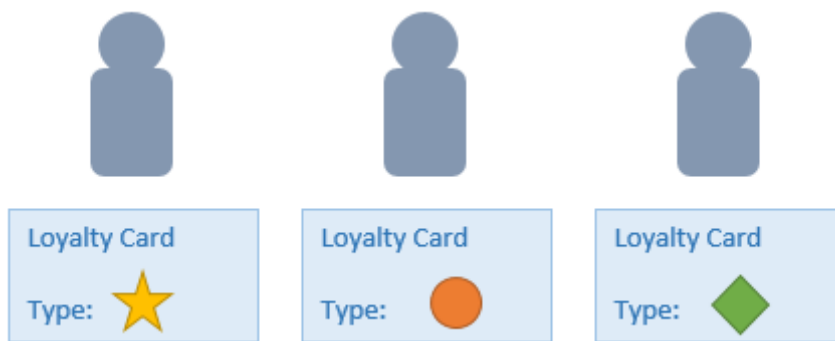
Loyalty card

A loyalty card is a physical or electronic card that uniquely identifies a customer's loyalty account, and records:

- Contact information.
- Whether the customer wants to be notified of promotions, and which contact method to use.
- The customer's purchases on that card.
- The points balance, if your loyalty is configured to award points.

Loyalty card type

A loyalty card type defines the rules of the loyalty card, such as how they accrue loyalty points, how points can be redeemed, and whether cards can be upgraded or downgraded to other types.

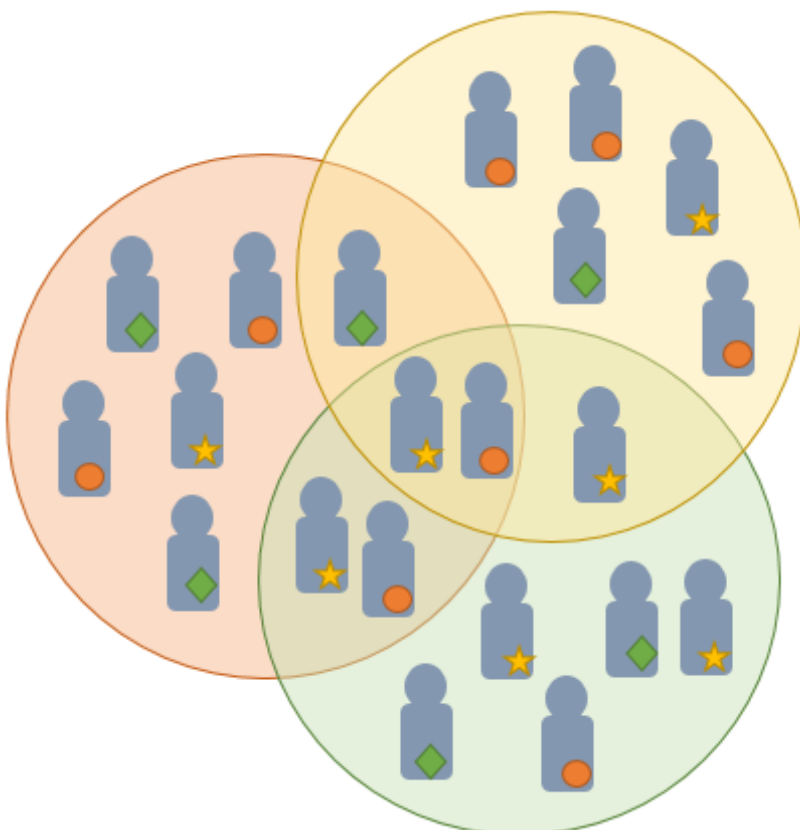


Loyalty department

A loyalty department allows you to control how a department's items accrue loyalty points for customers who purchase them, and how points are redeemed on items in that department.

Loyalty group

A loyalty group is a tool for categorising loyalty members to provide jackpots or rewards, or for reporting purposes. Loyalty members can belong to more than one group, and loyalty groups can contain loyalty members with different card types.



Loyalty points

Loyalty points are accrued by loyalty members for purchasing your company's goods or services. The number of loyalty points a loyalty member receives from a purchase is controlled by the item, the loyalty card, loyalty departments and other settings. Loyalty points can be redeemed to purchase goods, or exchanged for vouchers.

Loyalty voucher

A loyalty voucher is a voucher that can be used to purchase goods or services at your company. It is created by redeeming loyalty points for a specific value.

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.

Mail out

A mail out is a communication sent to your customers via email, SMS or postal mail, with marketing, survey, promotion or other information attached.

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.

Marketing member

A marketing member is a customer who has joined your marketing program to receive marketing information. They may or may not be a loyalty member or other customer: the marketing list is maintained separately from the loyalty and customer lists.

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.

Offer

An offer is a type of promotion that requires a coupon or code to be presented, and can be configured with a limit on the number redemptions allowed during a certain period. For example, instead of allowing 50% off to every customer, 50% off is only given to the customers who present the offer coupon, or only the first fifty customers who present the offer coupon each day.

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 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.

PLU group

A Price Look Up (PLU) group is a way of categorising items for reporting.

PLU Loyalty group

A loyalty Price Look Up (PLU) group provides special loyalty rewards to loyalty members when they purchase items in this PLU group.

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.

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, such as:

- 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.

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

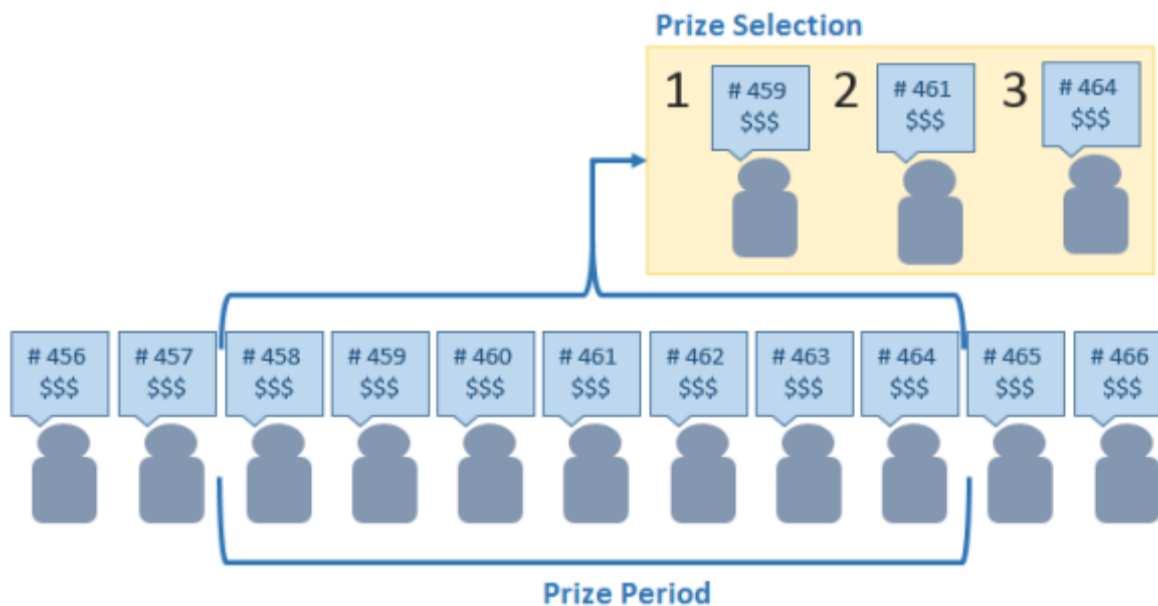
The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

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.

Prize

A prize is an award of loyalty points to one or more random transactions selected from all transactions in a specified period. For example, a prize may be awarded to three transactions every day.



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.

Quote

A quote is an offer for your company to provide a specified good or service to a potential customer for a specified price. A quote is usually only valid for a set period, after which it expires.

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.

Scale label

A scale label is an item label for a packaged item sold by weight. It includes the item's weight and the price encoded into the barcode, so the packaged item can be scanned at the Point of Sale without having to be re-weighed.

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.

Shelf label

A shelf label is an item label designed to site on a shelf denoting the price and other information for the item, rather than attaching a label to each unit of the item.

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.

Statement

A statement is a record of a debtor or customer's balance, for which an invoice has already been issued.

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.

Survey

A survey is a series of questions posed to customers through marketing mail outs. You can use surveys to create filters for other mailouts or surveys.

Table booking

A table booking is a customer request to be served at a particular table at a specified time, with a specified number of guests.

Table section

A table section is a category of tables, used to differentiate areas of your restaurant on the PDT, and for reporting purposes.

Table service

Table service is the act of serving food or beverages to your customers, either as a take-away service or dine-in service.

Terminal (iZen Point of Sale)

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.

Tipping

Tipping is a means of engaging your customers by awarding points if they correctly predict which team will win in a series of games.

Tipping game

A tipping game is a single game played between two teams at a tipping venue during a tipping round.

Tipping group

A tipping group is an organisation or sport that supports tipping, such as Australian Rules Football (AFL).

Tipping kiosk

A tipping kiosk is the terminal where tipping members select their game tips.

Tipping round

A tipping round is a group of games that occur over the same period, such as all the games in a single weekend. Tipping rounds are defined by the organisation body that manages the sport.

Tipping team

A tipping team is a player or group of players that perform as a single unit, such as a football team.

Team venue

A tipping venue is a venue or area that a game is played at, such as a stadium.

Transaction line (iZen Point of Sale)

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.

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.

Rewards card (i)	
Brian Smith	
Ch & Veg Stirfry 3.992kg N x \$7.99/kg	\$31.90
Gift Voucher recharge	\$50.00
Banana Muffin	-\$2.57
Coffee, Latte	\$3.42
Extra sugar	
Skinny Milk	
Rewards card discount	-\$3.27
Total:	\$79.48
Cash	\$50.00
Credit Card	\$34.10
Rounding	\$0.02
Change	\$4.60

User account

A user account is an account that allows a Portal or Point of Sale operator to log in and access features of the Portal or Point of Sale.

Voucher

A voucher is a card or ticket preloaded with an amount that can be used to pay for purchases or services. Vouchers may or may not be rechargeable, redeemable or require a fee or deposit, depending on the rules detailed in the voucher type.

Voucher mask

A voucher mask defines the pattern that a voucher code must fit to be accepted as that voucher type. You can define the initial digits of the code, and the acceptable length. For example, you can define that gift vouchers must start with 213 and be 13 digits long. Any gift voucher that does not match this pattern is then rejected by the Portal.

Voucher type

A voucher type is a set of rules that control how a voucher operates within your company, including the voucher mask, whether the voucher can be recharged, or requires a deposit amount. Voucher types can have sub-types that follow the same rules, but are differentiated for reporting reasons.

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.