ces software

CES Touch

CES Touch Dealer Manual

Version 1.0 (8.1.0 r2b31)

Contents

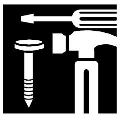
About This Manual

This Manual tells you how to configure and use CES Touch.
This manual assumes that the target audience is familiar with PC s and their general use.

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

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

	And these boxes contain some important settings relating to the section you are looking at

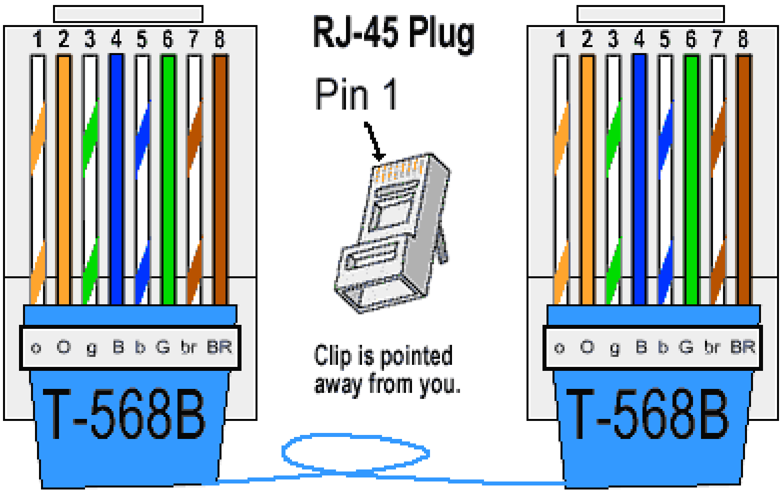


You will find this icon in the top left hand side of pages that contain dealer only information i.e. not in the User Guide

Mix and Match is not included in this version as it is currently being rewritten
Handhelds, Location Stock, Accounts, Bookings and Scales will be included in the next release
There will be a separate Crystal Reports manual which will list all standard reports available

Cabling

When making your own cables or installing structured cabling, follow the diagram below to ensure there are no data conflicts on the network when the system is live. It is imperative that you follow the correct colour coding according to this diagram. If you wire to a different specification it is almost guaranteed that the network will fail at some point.
Please adhere to the diagram for all new network cabling systems.



☝	The TIA/EIA 568-B standard was ratified in 2002. There is an older TIA/EIA 568-A standard which is still being used in today's environment. Both standards define the T-568A and T-568B pin-outs for using Unshielded Twisted Pair cable and RJ-45 connectors for Ethernet connectivity. The standards and pin-out specification appear to be related and interchangeable but are not the same and should not be used interchangeably.

☝	We recommend you use pre made cables rather than crimping your own please seek the advice of the service department as we have encountered numerous problems with DIY cabling

Network Set Up Guide

IMPORTANT – It is recommended that the back office PC is not used as the server unless absolutely necessary. This is because the back office PC is often used as more than just a till. It may have an Internet connection and be exposed to viruses, it may have games and other programs installed that slow it down and hog resources. If the server goes down, you will not be able to use any tills. Therefore it is safest to make one of the tills the server

This section will take you through step by step how to set up a networked system

Setting up IP Addresses

The following should be done on all terminals that will be running the CES software.

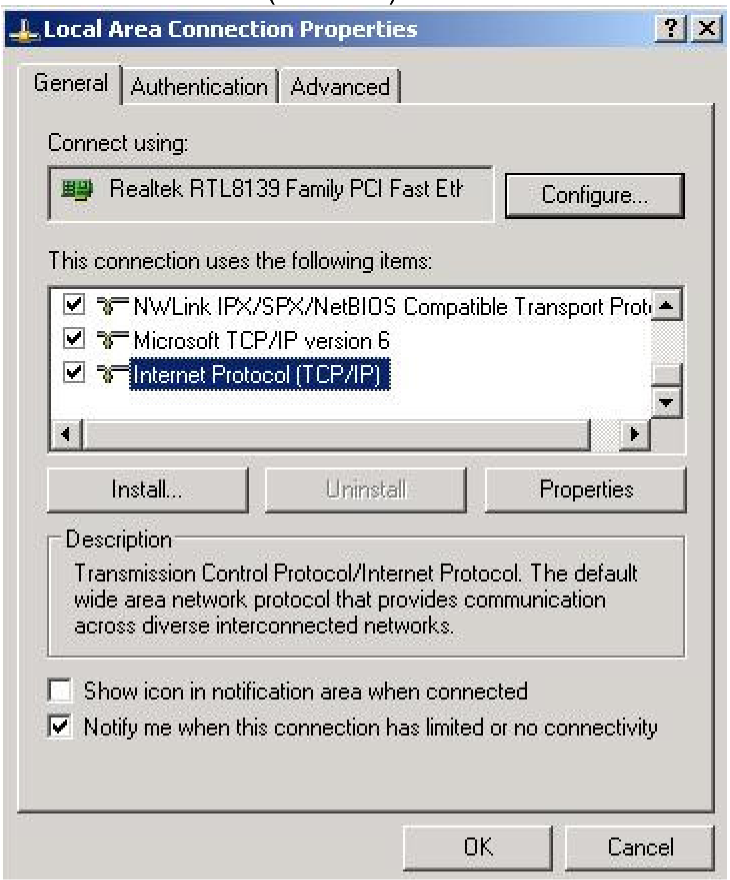
IMPORTANT – If connecting to an existing corporate network you will need to speak to whoever maintains the network to find out what IP addresses you can safely use. This is extremely important, as duplicating an IP address that is already in use will knock that machine off the network and possibly bring down the whole network. This will lead to major disruption if this is an important server such as the mail server.

- Select
- Start >> Control Panel >> Network Connections

- Right click ‘Local Area Connection’ and choose ‘Properties’.

NOTE - the connection name might be different for a back office pc. This is because all of our terminals will be set up identically. You will have to figure out which connection goes to the network your tills are on if there is more than one network connection.

- Select
  Internet Protocol (TCP/IP)



- Select Properties
- Select 'Use the following IP address' radio button

In the 'IP address:' field, you will need to enter the IP address for this terminal.

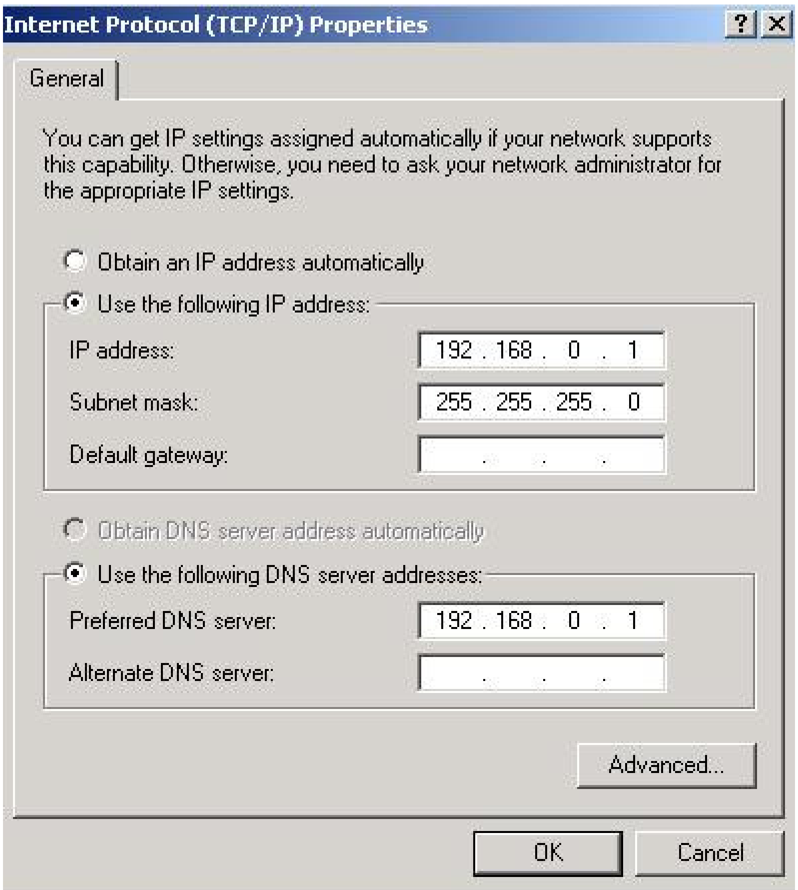
	Each till will have a different IP address, usually starting with 192.168.x.x. All the tills will have the same Subnet mask.

For Example:

Till01
IP = 192.168.0.1
Subnet mask = 255.255.255.0

Till02
IP = 192.168.0.2
Subnet mask = 255.255.255.0

Till03
IP = 192.168.0.3
Subnet mask = 255.255.255.0



Once you have filled this in click ‘OK’, then ‘OK’ again

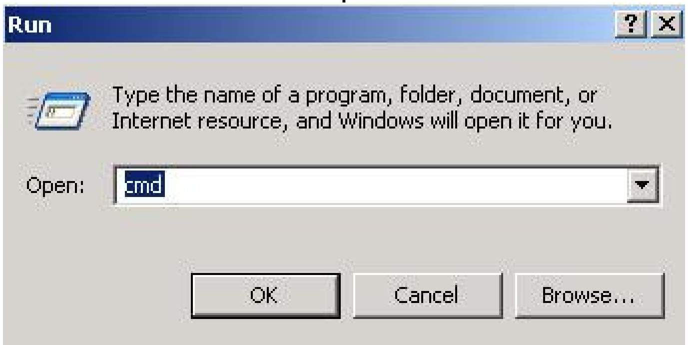
☝	Write down these IP settings and the terminals they relate to for use later on

Verifying the IP Addresses and Pinging Terminals

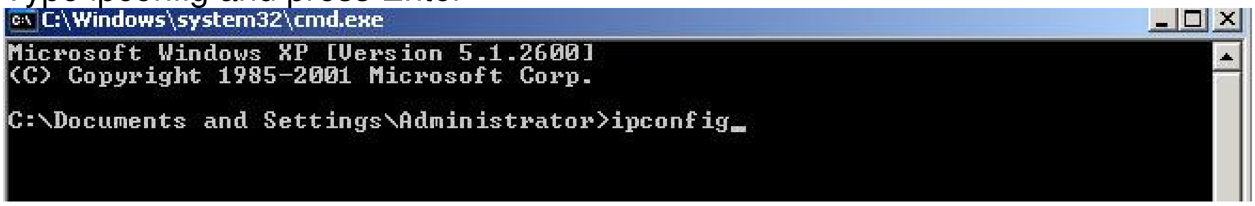
☝	Note: some of the older hard drives do not have ping on them so this may not work!!

- Select
- Start >> Run

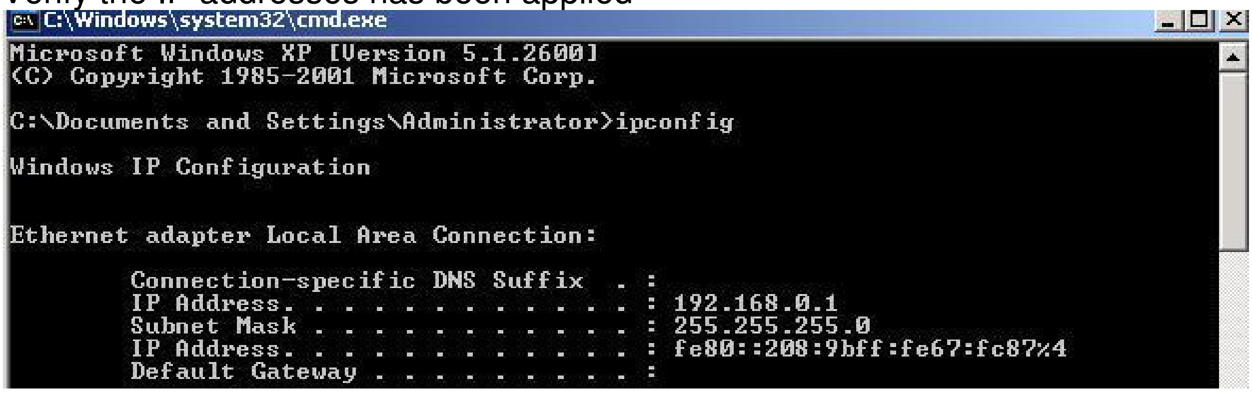
The run command box will open



- Enter cmd then click OK
- Type ipconfig and press Enter



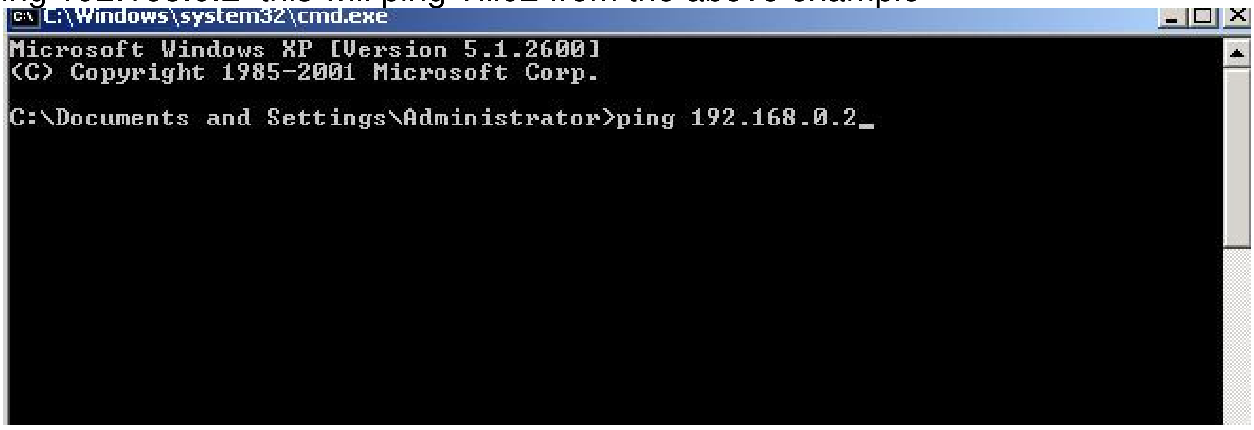
Verify the IP addresses has been applied



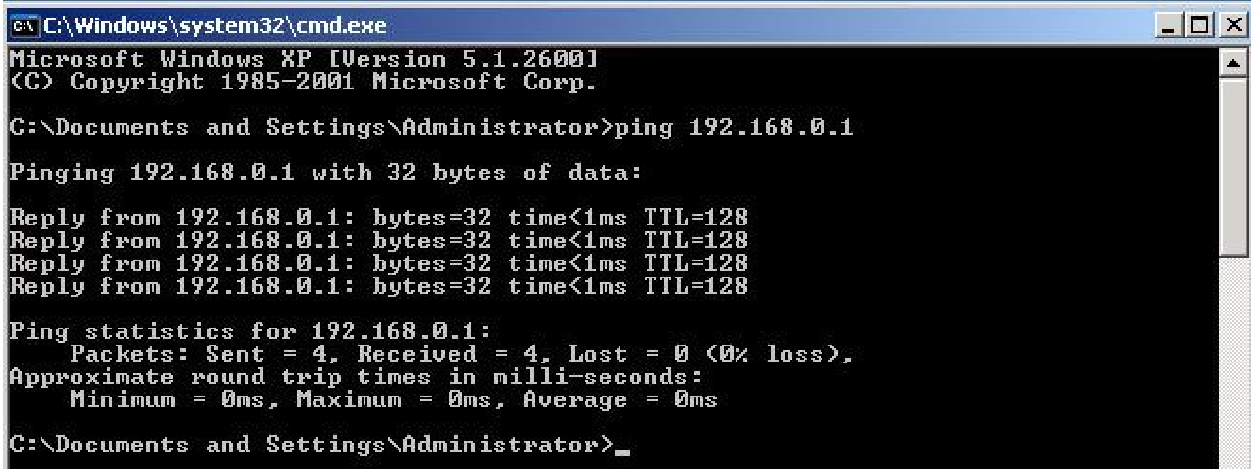
Once this has been verified you can now ‘Ping’ other tills/PCs on the network

- Type ‘ping’ then the IP address of the terminal you are trying to communicate with

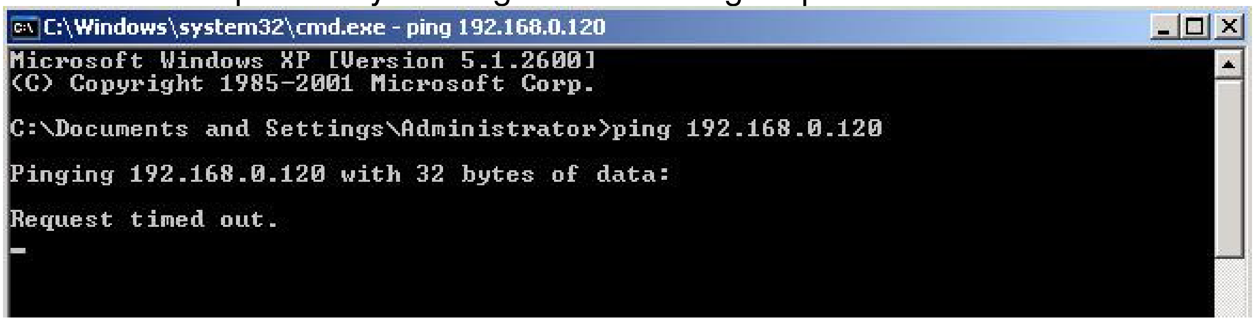
E.g. Ping 192.168.0.2 this will ping Till02 from the above example



If the network is set up correctly you should get a response similar to this



Whereas if there is a problem you will get the following response



If you get the timed out response it means that you were unable to reach the target pc over the network. This may be due to any of the following

- Damaged/disconnected cable
- Faulty or disconnected hub/switch
- Using a crossover cable instead of a straight through cable,
- Invalid or conflicting IP address (i.e. two machines with the same IP)
- Extremely busy network
- Firewall running on the target machine (Common for back office PCs)

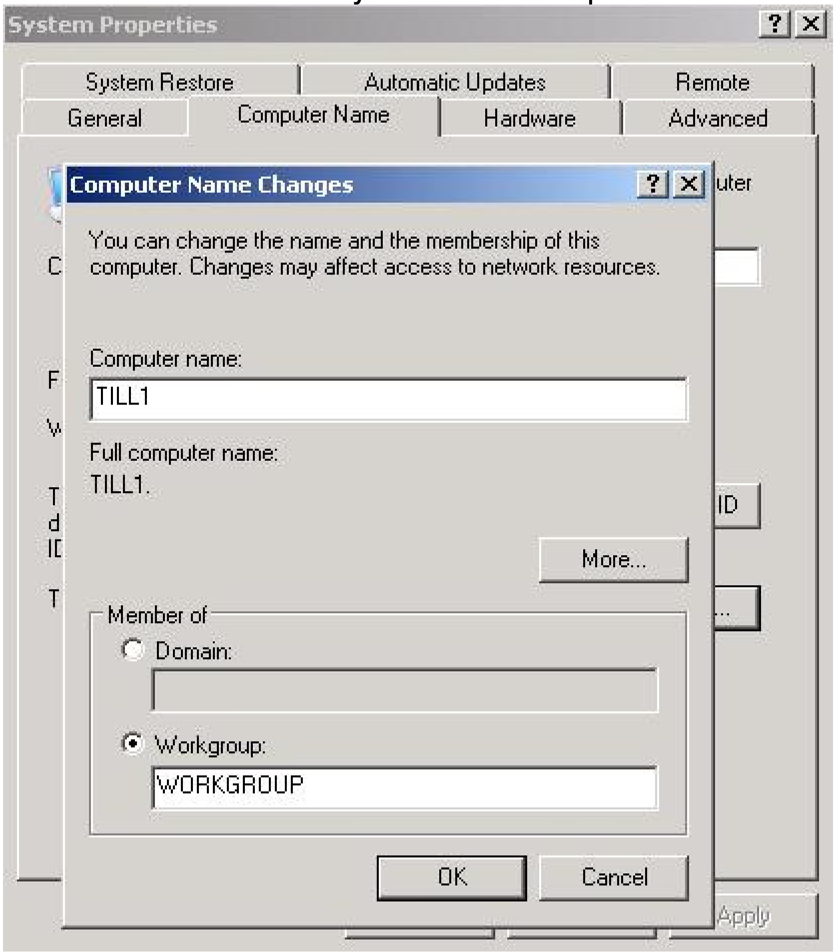
☝	Remember 'Pinging' as it will come in very useful when solving networking problems

Computer and Workgroup Names

All machines must be on the same workgroup
On each machine

- Select

Start >> Control Panel >> System >> Computer Name >> Change



- Give the computer a unique name *e.g. Till01 or Till02*
- Ensure all the tills/terminals belong to the same workgroup, this will usually be workgroup

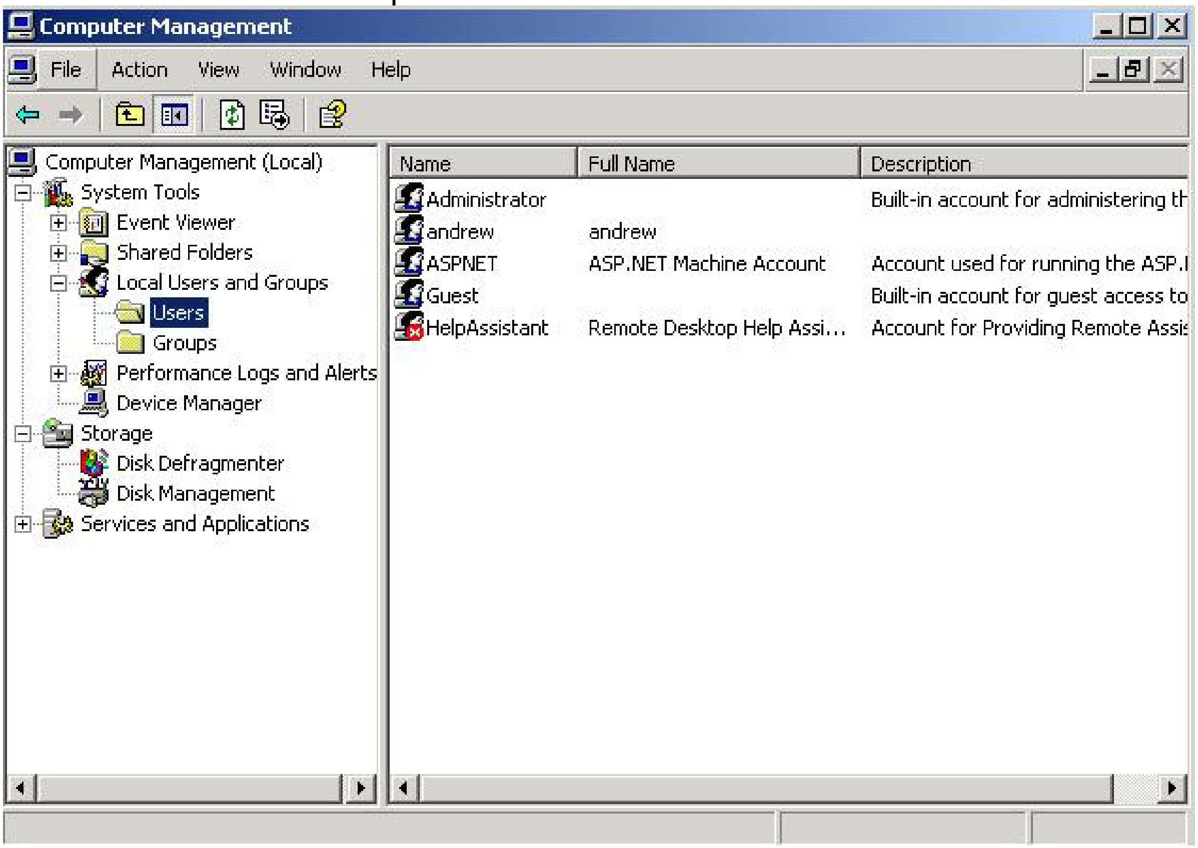
	All computers running the CESTouch software must be a member of the same workgroup. If they are not, those computers belonging to a different workgroup will not be able to link to the computers running the CESTouch software

- Select OK

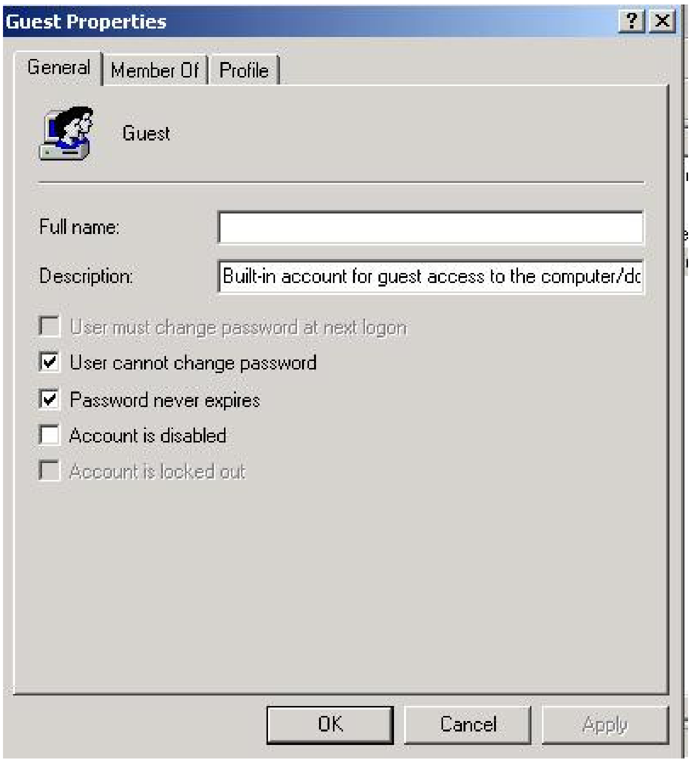
	You may be prompted to restart your computer, if it does click OK to restart

Enable a guest account

- Select
  Start >> Control Panel >> Administrative Tools >> Computer Management >> Local Users and Groups >> Users

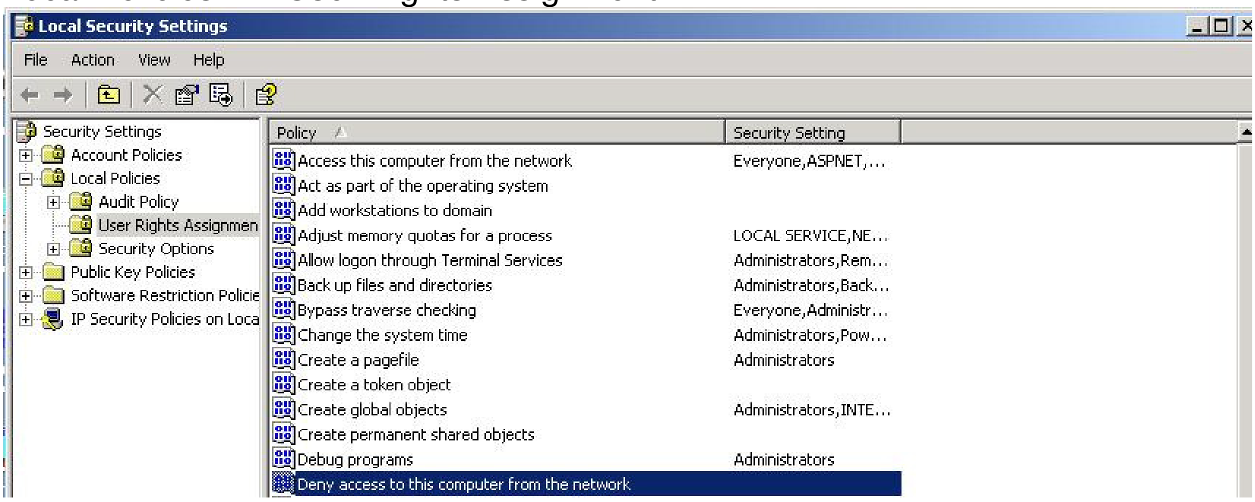


- Double click Guest and un-tick the Account is disabled checkbox



- Select OK then exit back to the Desktop

- Select
  Start >> Control Panel >> Administrative Tools >> Local Security Policy >> Local Policies >> User Rights Assignment



- Double click Deny access to this computer from the network

Select

- Guest >> Remove >> OK

Setting up Shared Folders /Drive

On all terminals share the touch folder we share the entire C: drive

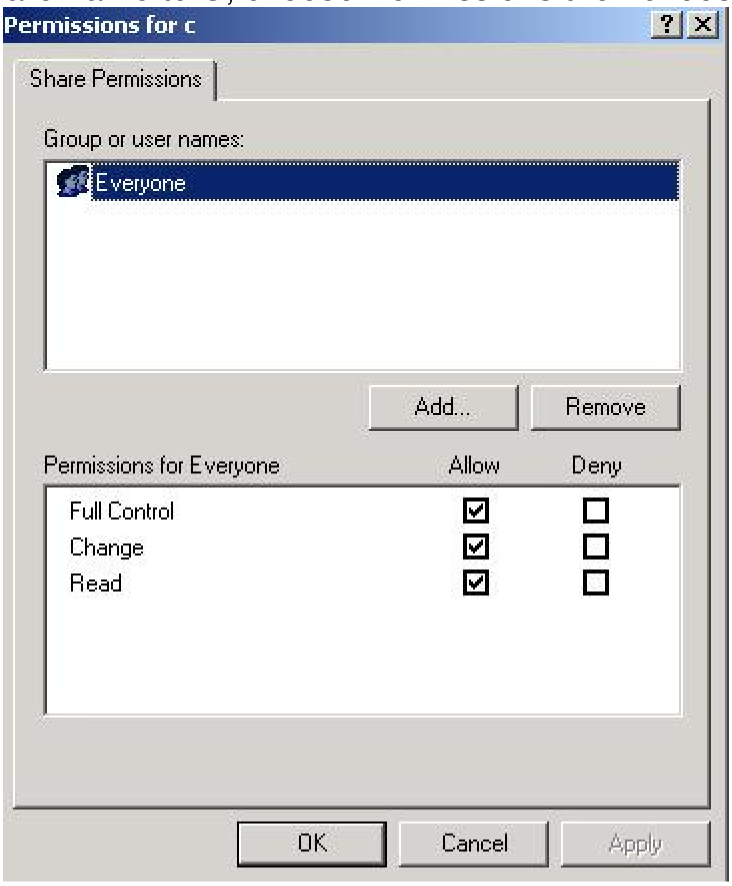
Select

- Start >> My Computer then right click drive C:

Select

- Sharing and Security
- Select the Sharing tab
- Select New Share

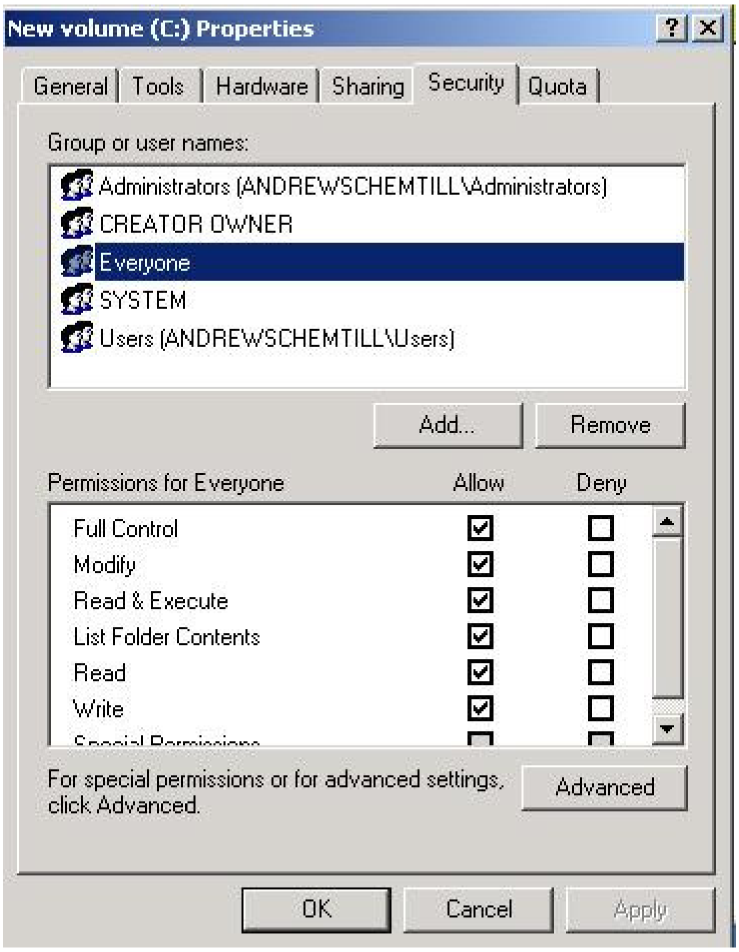
Set share name to C, choose Permissions then choose Allow for Full Control



Select

- OK and OK again to return to the Local Disk (C:) Properties screen

- Click the Security tab and choose Everyone then choose Allow for Full Control Choose OK



NOTE – If your sharing and security screen does not look as described and you are running Windows XP Professional, it could be that you have simplified view enabled
To disable this:
Start >> My Computer >> Tools >> Folder Options >> View
Un-tick ‘Use simple file sharing (Recommended)’ checkbox then click ‘OK’

Map the Network Drive

To create a network drive so that slave machines can access the data on the server (master till)

On each terminal except the one you have chosen to be the master
Select

- Start -> my computer -> tools -> map network drive

- Set the drive letter to G (unless this is already in use)
- Select Browse -> In the window that comes up click My Network Places -> Microsoft Windows Network -> Workgroup

A list of Computer Names is displayed, select the one that corresponds to your server

- Select the shared folder “c” click ok -> make sure “reconnect at logon” is ticked -> select finish

	If you cannot see the shared folder c from any of the machines, then either you have missed something when performing the above steps, or the server may have a firewall enabled

You can check if a firewall is enabled by using step 2 to ping the server. Firewalled machines will not usually return a ping request. If a machine can see all other machines on the network but none can see it, this is also usually a sure sign of a firewall issue.

Changing the Paths on the Slave Tills

From a standard install, the CES Touch software on each till will be running in stand-alone mode. We need to tell each slave to use the data from the master terminal.

☝	Leave the paths as they are for the master, as they will default to the local files

- Start the Touch Software
- Sign in as the manager (Password 1066)
- Select back office
- Utilities
- System menu
- Settings

On the slaves, assuming the mapped drive used was G:, set the paths as follows

➢ Server Data Folder	=	g:\touch\data
➢ Local Data Folder	=	c:\touch\data
➢ Remote Folder	=	g:\touch\remotes
➢ Account Folder	=	g:\touch\accounts
➢ Reports Folder	=	g:\touch\reports
➢ Archive Folder	=	g:\touch\archives

Setting Automatic Login

When a terminal is started you will be prompted for a username and password; to make the user automatically log in to avoid this

- Start
- Run
- Type in ‘control userpasswords2’
- OK
- Untick ‘users must enter a user name and password to use this computer’
- OK
- In the user name and password box make sure the user name is Administrator and the password is blank
- OK

Disabling Security Reminders and Automatic Updates

To disable the pop up bubbles that remind you your firewall is turned off etc

- Start
- Control Panel
- Security Centre
- Change the way security centre alerts me
- Un tick every option
- OK

And to turn off automatic update reminders

- Start
- Control Panel
- Automatic Updates
- Tick ‘turn off automatic updates’
- OK

CESTouch Data/Folder Structure

CES Touch installs itself to the C:\Touch folder by default.
It is highly recommended to use the default folder for the installation.

Touch

Accounts	Databases storing all account information
Archive	Sales databases are archived here at the end of the month
Barcode Fonts	Fonts for barcode labels in case you need to install them
Data	All databases containing program information
System	Systeminformation.DBF stores the licence information
Datasym	Old import/export folder
Dongle	Drivers for the blue licence dongle
Forms	Various import and export scripts
CESExport	Default export folder
CESImport	Default import folder
Graphics	Images used in the software
Images	Pictures for customers etc
Accounts	Customer account images
Buttons	Images on screen buttons
Customers	Customer Pictures
Products	Product Pictures
Staff	Operator Pictures
Optimus	Files for running the Optimus handheld
Remote	Databases for the remote engine
Reports	FoxPro style reports and label files
Crystal	Crystal Style Back Office reports
Bespoke	Files here override the files in Crystal folder with the same name
Scanpal2	Files for the Scanpal2 handheld
Training	Data folder copied here when refreshing training data, it is this data that training mode operators use

Important Files in the Touch Folder

CESTSBackup.exe	Back up routine called by eod.bat
Control.dbf	Database storing the PATH settings
Control.Original	Database with default PATH settings
DongleNumberCheck.exe	Shows you the blue dongle terminal licence number
Eod.bat	Runs after end of day, triggers backup routine
Remote Printers.exe	Starts the remote printer console
Tableplanner.exe	Starts the table planner module
Touch.exe	Main touch exe
TouchClearDownUtility-version8.1.0.exe	Clears out selected data
Touchetopuplicencer.exe	Used to licence the etopup module
ETopUp.ini	Stores etopup config, delete to turn it off
TouchSalesViewer.exe	Rear screen slide show and subtotal screen

FoxPro Tables

CES Touch data is stored in FoxPro tables. Each table will consist of a dbf and possibly an index and/or memo file. This means that each table will consist of up to 3 separate files, for example the stock table:

Stock.dbf	database file
Stock.cdx	index file
Stock.fpt	memo table

If you are copying a database from one system to another then all of these files must be kept together. For example, to copy the stock database above you would copy all 3 files. Missing one of them would render the database unreadable.

Sending Files to CES

CES recommends sending files by e-mail if you require a member of the support team to look at the files urgently
The maximum size of attached files to CES via e-mail can be no larger than 5MB. If attached files exceed this maximum then zip up the files to be no more than 5MB then send via e-mail to CES or send the zipped up file via ‘www.mailbigfile.com’
A single file of up to a maximum of 100MB can be sent to CES via this method.

If you are requested to send a copy of a Touch system to CES it is advisable to send the whole touch folder with all sub folders and files, in a compressed zip file

☝	To zip the folder: right click on the touch folder and select send to compressed zipped folder

If there is limited space to store the data, the following folders including any sub folder with all their files are required

- Accounts (if used)
- Archive (if the problem is related to sales before the current calendar month) Data

Installation Instructions

Installing CES Touch Software v8.1.0 (on a new computer)

To install CES Touch Software v8 onto a new computer follow the steps below.

1. Insert the CES Touch Software CD
2. Install the CES Touch Software (follow the on-screen prompts)
3. Install the Crystal Reports Support Files (follow the on-screen prompts)
4. Install the Latest Patch Update (for 8.1.x) downloaded from the CES Dealer Download Site
5. Install the Dongle Drivers (if it is an old style dongle) and insert your Dongle into a free USB port.

☝	Before you do the next bit – make sure the software is not running on any other terminals

Delete c:\touch\data\update_date.dbf

6. Start the software

Installing onto a Touch Screen terminal
The touch screen terminals should come preinstalled with CES Touch (if requested) If not preloaded the installation procedure is the same as above however; the touch installer, crystal installer and patch should be copied to a USB memory stick and run from there

☝	All of these files are available on the dealer download area

Upgrading an existing 8.0.x CES Touch Software Site

Before Upgrading take a full backup of the existing Touch folder.

1. In Add or Remove programs (control panel) uninstall all previous versions of the CES Touch Software and remove any remaining files in the c:\touch folder.

2. Insert the CES Touch Software CD/USB memory stick with touch installer and patch on

3. Install the CES Touch Software (follow the on-screen prompts)

4. If necessary install the Dongle Drivers from the CD or c:\touch\dongle\drivers\setupdrv.exe (refer to the Dongle section for more information if using a blue dongle)

5. Take a backup copy of the cleanly installed touch folder, as this may be useful if any files fail to be upgraded

6. Copy the entire ‘Data’ folder from your backup over the top of the existing ‘Data’ folder in your newly installed c:\touch folder.

7. Copy the entire ‘Accounts’ directory from your backup over the top of the existing ‘Accounts’ folder in your newly installed ‘C:\Touch’ folder.

8. Copy the entire ‘Archive’ folder from your backup into your newly installed ‘C:\Touch’ folder if an archive folder already exists please delete the new one before copying in your backup.

9. Install latest 8.10 patch

   Delete c:\touch\data\update_date.dbf

☝	Before you do the next bit – make sure the software is not running on any other terminals

Restart the software – this will run the file checker

CES Touch Patch Update
Always upgrade the Master till first then repeat these steps for each terminal in turn

1. Before Updating with the latest patch, take a full backup of the existing 'Touch' folder.

2. After retrieving the patch update file from the CES Website, run the update file. ('TOUCH810UPDATE.EXE' correct as of 12/11/2007) Unzip to the c:\ (this is set by default so you just need to click OK)

3. Delete the 'Update_Date.DBF' file, which can be found in the 'Touch\Data' folder.

4. Make sure the software is not running on any other terminal

5. Run 'Touch' program as normal.

   On start up the 'CES TS File Checker program checks all the necessary files.

File checking can also be performed at any stage after the initial routine has been run. This can be found by choosing: -

Utilities >> System Menu >> File Checker

After file checking has been performed, the user is prompted to have 'Touch Utilities' to check the data.

6. Exit the software and repeat for remaining terminals

7. Choose 'Yes' if you suspect any problem with any of the data files, otherwise choose 'No'.

Please Note: The v8 CES Touch Software release contains many new and improved features. Please ensure you and your customers are happy with the new and improved features before upgrading an existing site.

Dongles

The ‘Terminal Licence Number’ is held within the dongle. This is the number used to identify a terminal when licensing the software

☝	This is true for software versions 8.1.0 or higher

Prior to this, the number is retrieved from the hard drive of the terminal.
On new TS-600 terminals the dongle is fitted to the inside of the terminal.

Other PC terminals, a USB dongle is supplied which plugs into an external USB port.

Two types of dongles may be issued, Blue and Green.
The Blue dongles are generally the older type and require a driver to be installed.

Installing the blue dongle

- To install the driver, run the file ‘Setupdrv.exe’, which can be found within the C:\Touch\Dongle\Drivers folder. Follow the on-screen instructions.

- Once the driver has been installed, insert the dongle into a free USB port

☝	If possible plug the dongle into the back or underside of the PC so it cannot be removed easily

- When the system says it has found new hardware choose the automatic install option (If it asks about connecting to the internet to search for drivers choose ‘No’). If the install process says it is missing a file, point it to the path ‘C:\Touch\Dongle\Drivers’ as this is where all the necessary files will be.

Installing the green dongle

The Green dongles should be detected by the operating system and the driver automatically installed as soon as it is plugged into the terminal.

☝	If the dongle does not automatically install, install the latest patch.

☝	Once the dongle is successfully installed go to back office, utilities, system menu, settings, license – you will see a terminal license number

License Forms

Each system has to be licensed by filling out the CES Touch order form.

There are two separate order forms, one for registering a new systems and the other for use when upgrading an existing CES Touch system.

If ordering a new CES Touch system, use the form headed ‘CESTOUCH ORDER FORM (NEW SYSTEMS)’.

If you are upgrading an existing system to the latest version, use the form headed ‘CESTOUCH ORDER FORM UPGRADE TO VERSION 8.1 OR HIGHER’.

☝	Fill out the form with precision as mistakes cannot be rectified afterwards and a mistake could cost you a new License later on

Filling out the CES Touch order form

☝	Customer Name on the order form the has to be filled out exactly, as the licence will be registered to this name

Indicate whether the system is to be registered as:

- Full = Full system including Accounts, Customer, Stock, Bookings and Table Planner modules
- Hospitality Lite = Table Planner module
- Retail Lite = Stock module

☝	If the Customer requires a Loyalty system this can only be achieved with a full system

Additional modules available are:

- Credit Card Tenders
- GuestMaster
- Sage Link
- Chip & Pin
- Weigh Scales
- Messenger

☝	Each of these extra modules is available only on a Full license

Once completed, the form must be faxed back to CES on 020 839 1060

License Expiry

Licenses are registered for a period of a year. When the license expires, a message will appear warning the user that the license has expired

CES Touch will run normally as a fully registered system even though the license has expired. This message is just to encourage the end user to keep in touch with their dealer

To re-license the software, contact CES Support department whereby a new license will be obtained from CES.

We will forward the new license number as soon as we receive it from CES.

Setting Up Peripherals

Printers

	Back Office reports only print on A4 windows printer Labels print on A4 windows printer or a label printer such as a TML60 NOT receipt printer Front Office reports print on receipt printer (some do have an option to print A4)

Serial Receipt Printers

	Receipt Port Number **Use 19200 baud rate** **Use 38400 baud rate** **Use dotmatrix control codes on receipts**

Set the com port
The printer should be delivered configured correctly, if you need to check the settings; the printer should be configured as follows:

9600 baud rate (unless using a setting above to increase the speed)
8 bit data
1 stop bit
No parity

	Getting question marks when printing receipts usually indicates either incorrect parity or speed

Cabling – for short cable runs use a normal 9 to 25 way serial cable usually included with the printer

For longer runs – use a standard network patch lead with an ADP1 on the till end and CB5 on the other

USB Receipt Printers

To set up a USB printer

- Copy btp2002drivers to c:
- Open folder C:\btp2002drivers\BYOPoSetupV2.30\BYOPoSetupV2.30\Disk1
- Double click on setup.exe

The Windows installer will begin to run

- Click next
- Click yes
- Click next
- Click next
- Click next
- Click finish

Plug the printer into a free USB port on the till and the add new hardware wizard will start

- Select no not this time and click next
- Select install from a list or specific location and click next
- Select include this location in the search and click browse
- Select C:\btp2002drivers\BYOPoSetupV2.30\BYOPoSetupV2.30\USBDriver2.20
- Click next

The driver will install

- Click finish

- Double click on BYPoSConfig.exe on the desktop
- Click device
- Click add printer

The add new device window will appear

- Under select prints select btp2002np
- Under select ports select USB

A new window will open

- Click search (device name will appear in the box)
- Click OK
- Click OK to the warning that appears

In setup a logical device name

- Type ‘touchusb1’
- Click OK

Close BYPoSConfig

Open CES

- Select Utilities
- Select System Menu
- Select Settings
- Select receipt printer settings
- Select USB printer device name
- Select touchusb1

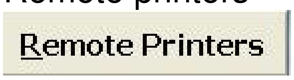
Kitchen Printers (serial only)

	Disable Printing to Remote x **Print Free Text on Remote** **Print Receipt Number on Remote** **Sort Remote Output by** **Remote x – dotmatrix control codes** **Repeat Remote x output to**

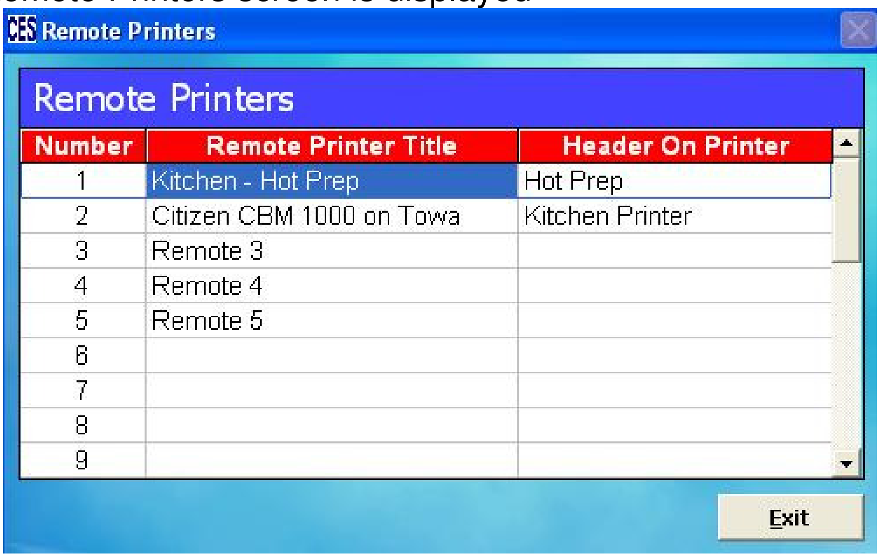
It is common to have several tills printing food orders to 1 printer in the kitchen this printer is known as a remote printer.
You can have a maximum of 10 remote printers configured

Set Up Printer Names

- Settings
- Remote printers



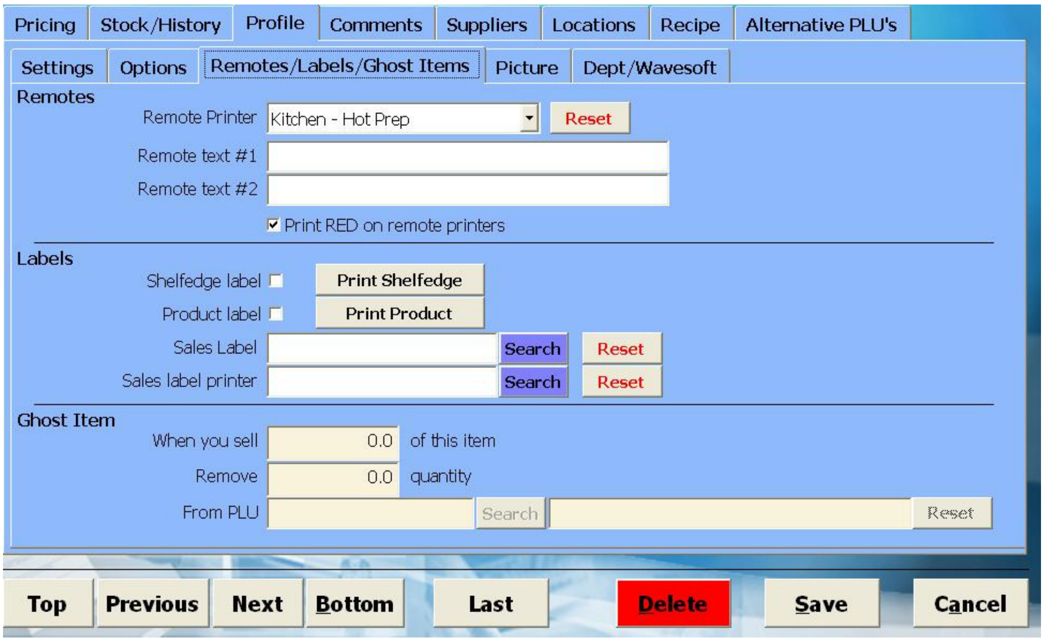
The Remote Printers screen is displayed



- Enter printer name in the Title field
- Type the text that you want to print out at the top of the ticket e.g. kitchen

Product set up
You must tell the product where you want it to print

- Select the product
- Select the remotes tab



- From the drop down box select the remote printer for this product to be printed at
- Add any extra text when this product is ordered *e.g. products in English but print in French to the kitchen*
- Select if to be printed in red on the remote printer

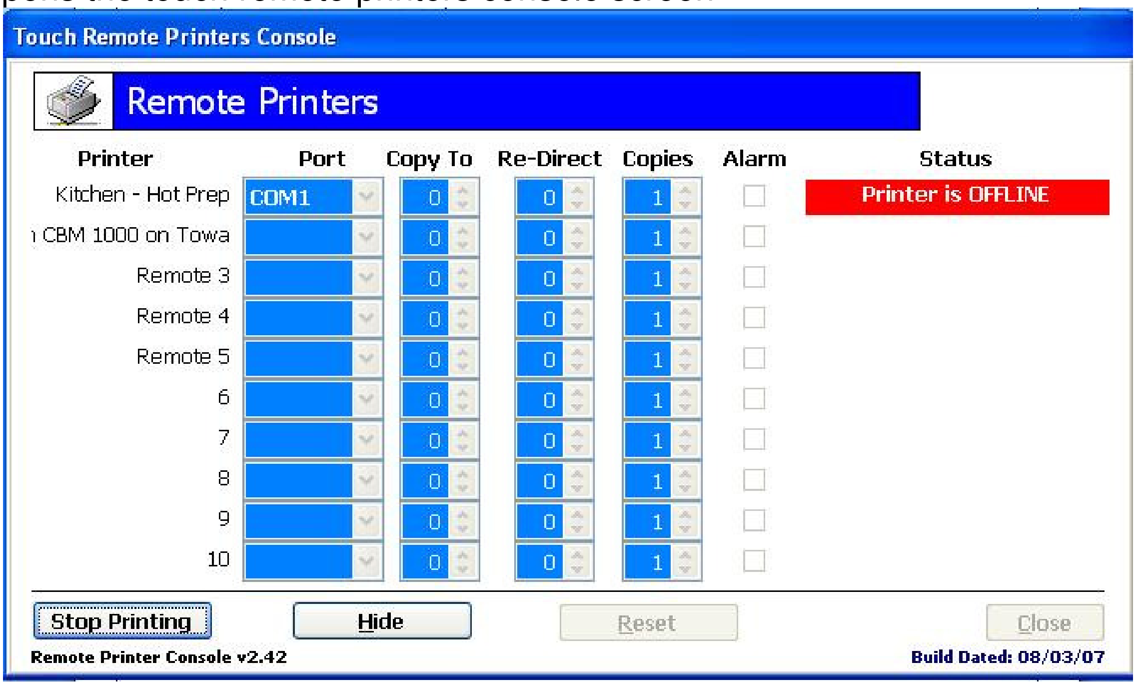
Configure the remote engine
Every time you sell a product that is set to print to a remote printer and finalise the sale or store to a charge sheet or table a ticket file is created in the remotes file on the master. On any till that has a remote printer connected to it a remote printer engine must be running
The remote printer engine monitors the remotes folder on the master and will print tickets for those printers it is configured for

- C:\touch\remoteprinter.exe

☝	Add a short cut so it starts every time windows starts

- The program will minimise to the system tray and the icon looks like this 
- Double click the icon to open

This opens the touch remote printers console screen

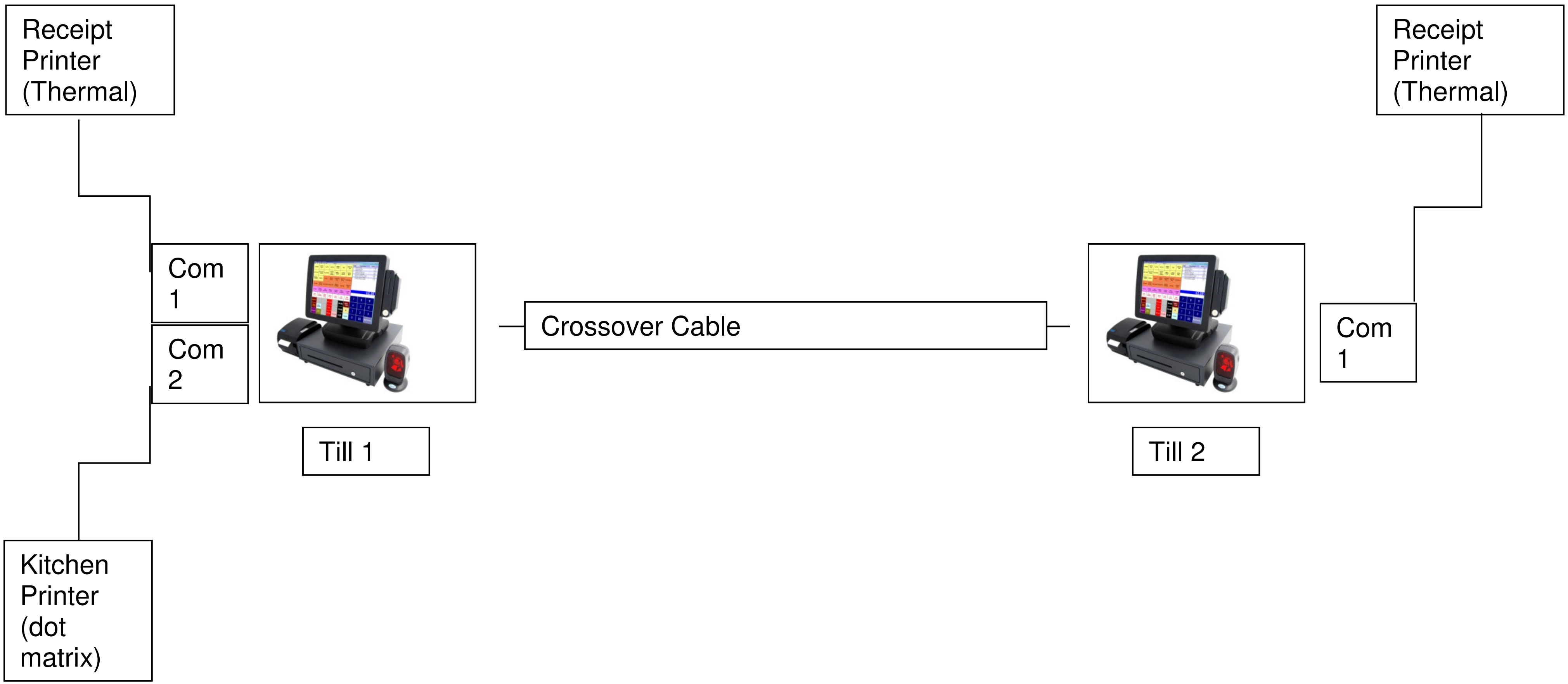


This screen is remote printer 1 (the first line) has the name kitchen Hot prep and is located on com 1 of this till, the status is currently offline as it is out of paper or the printer switched off

- Copy to – sends a duplicate to another printer
- Re-direct – If this printer is offline which printer to send the print to
- Copies – number of copies to print
- Alarm – We can supply a device called a kitchen alarm, when a ticket comes through will omit a tone and flash – tick to enable
- Hide – minimises the icon
- Stop Printing – Stops the printing and allows you to change the settings
- Close – closes the application

☝	If your receipt printer is offline then the jobs will keep building up in the remotes folder and when the printer comes back on line they will print out

Example 1


Receipt Printer (Thermal)
Com 1
Com 2
Kitchen Printer (dot matrix)
Till 1
Crossover Cable
Till 2
Com 1
Receipt Printer (Thermal)

In example 1 till one and till two have their own receipt printers and will share a kitchen printer. To achieve this:

1. Set the remote printer up in printer names e.g. KP

2. On till 1

    a. Receipt port number = 1
    b. Redirect receipt to = none
    c. Use dot matrix on receipt = no
    d. Use dot matrix on remote 1 = yes
    e. Remote engine line 1 = com 2

3. On till 2

    a. Receipt port number = 1
    b. Redirect receipt to = none
    c. Use dot matrix on receipt = no
    d. Use dot matrix on remote 1 = yes
    e. No remote engine

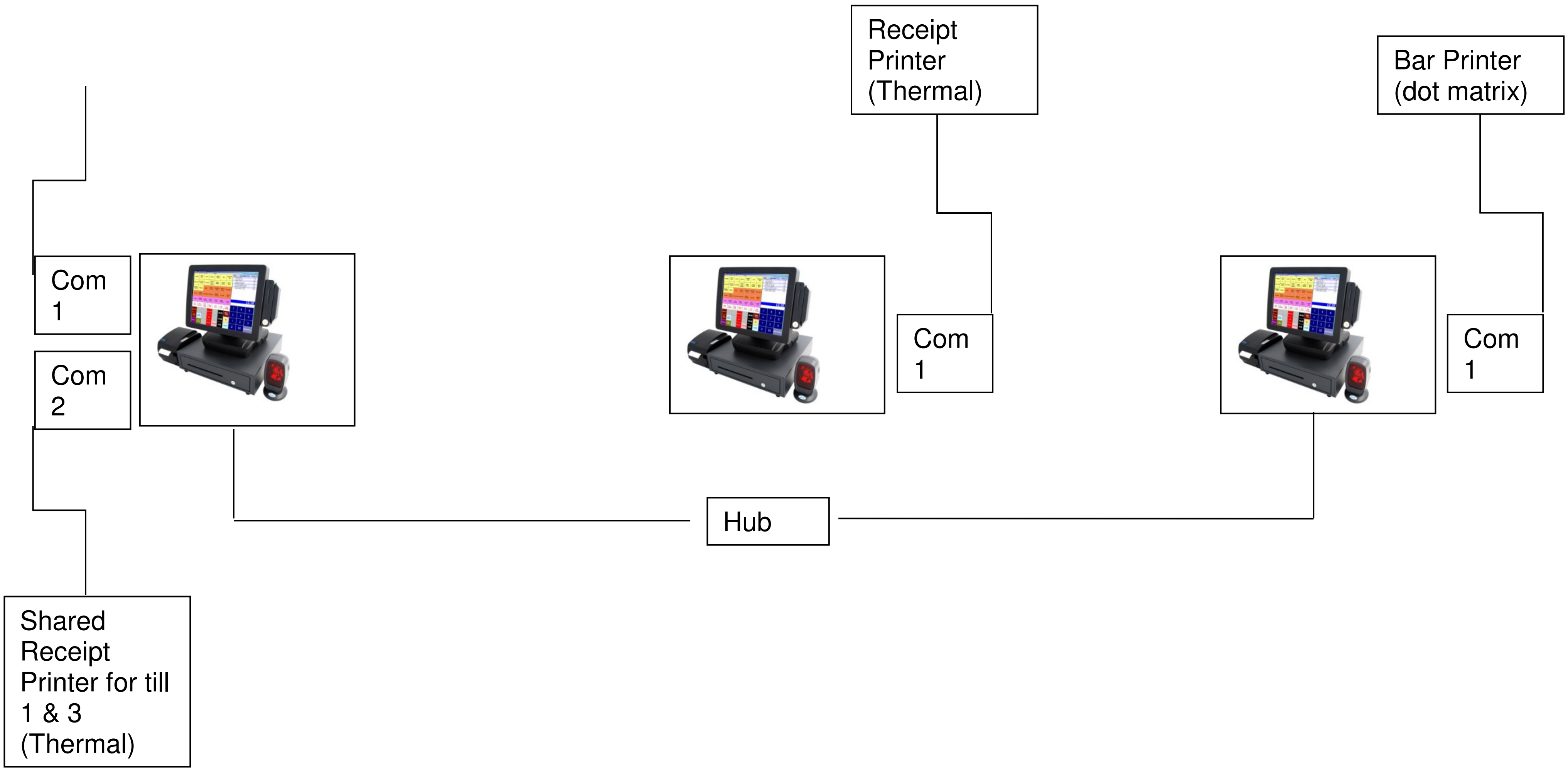
Example 2

Kitchen Printer (dot matrix)

Till 1

Till 2

Till 3


Receipt Printer (Thermal)
Bar Printer (dot matrix)
Com 1
Com 2
Com 1
Com 1
Hub
Shared Receipt Printer for till 1 & 3 (Thermal)

In example 2 there is a kitchen printer, bar printer and a receipt printer shared between tills 1 & 3 and till 2 has its own printer. To achieve this:

1. Set the remote printers up in printer names
    a. Remote 1 = KP
    b. Remote 2 = BP
    c. Remote 3 = shared receipt

2. On till 1

    a. Receipt port number = none
    b. Redirect receipt to = 3
    c. Remote engine running with line 1 = com 1, line 2 = blank, line 3 = com 2

3. On till 2

    a. Receipt port number = 1
    b. Redirect receipt to = none
    c. No remote engine
    d. Use dot matrix codes on receipt = no

4. On till 3

    a. Receipt port number = none
    b. Redirect receipt to = 3
    c. Remote engine running with line 1 = blank, line 2 = com 1, line 3 = blank
5. All tills
    a. Remote 1 & 3 use dot matrix codes
    b. Remote 2 does not use dot matrix codes

Graphic Receipt Logos

CES Touch can print a graphic logo on the receipt in one of two ways.

1. This method is slowest to print, as the logo must be sent to the printer with every receipt
    a. Take a monochrome bitmap image, 256x128 pixels
    b. Rotate 90 clockwise
    c. Invert the colours
    d. Save as header.bmp in the data folder
    e. Go to Back office > utilities > system menu > Settings > print header bitmap on receipt = yes

2. Use the CES printer utility to store the logo in the printer. This is the fastest method of printing, as the logo does not need to be sent to the printer every transaction
    a. Open PrnUtilities
    b. Select printer model (for the BTPR580 use BTP2002NP)
    c. Select port settings (turn the printer on holding feed to check its configuration)
    d. Click download icon (looks like a planet at the top)
    e. Memory selection should be set to flash
    f. Use open file to select your image
    g. Adjust contrast etc
    h. Click download to send to the printer
    i. Now in CES Touch go to Back office > utilities > system menu > Settings > additional printer header command and paste the following chr(28)+'p'+chr(1)+chr(0)

Drawers

☝	Make sure you have the correct voltage for the socket being used! Ask the service department

Installing through the Printer 24v

	Cash Drawer **Wait for Cash Drawer**

Plug the cash drawer into the back of the printer – set drawer setting to be receipt printer

Installing through the Till Port 12v
Ensure the correct driver is installed DLPORTIO in most cases

☝	The TS800 driver is extremely complex to install and we would highly recommend firing from a printer

Set the drawer to match the model of your till

Scanners

USB

USB scanners will be shipped out plug and play – simply plug the scanner into a free USB port

Serial

	Scanner Port Number

Serial scanners you will need to designate the port you are plugging the scanner into

☝	If you have special configuration requirements e.g. 02 barcodes please speak to the service department

Dallas Keys/Swipe Cards

Dallas Keys
When ordering Dallas keys it is important that you specify they are to be used with CES Touch
If your card swipe is putting a ; and ? around your dallas key code then this card swipe has not been configured for CES Touch. To correct this you will need to open up the card swipe unit, unscrew the L shaped circuit board, you will see a green wire attached to one of the legs of the chip on this board, cut this wire. If in doubt please consult our service department

Card Swipes
To remove the ; and ? from the swiped card numbers you will need to do the following:

Identifying your card swipe model
There are two models of card swipe. One you will need to use an application to program s64decoder, the other you will program using key presses in notepad.

1) Swipe a card

If the light on the card reader goes off then back on green then this is the older card swipe and you will need to use the s64decoder utility.

If the light flashes amber then green this is the new style which you will program using keyboard presses in notepad

Programming the old style Card Swipe:

- Install s64decoder utility and run
- Go to magnetic reader, interface, interface this should be set to keyboard mode
- Go to magnetic reader, communication, magnetic reader, and untick "send start/stop character"
- Go to magnetic reader, transmit, click keyboard, click download to decoder

Programming new style card swipe:
Make sure a ps2 keyboard was attached to the ECR before booting up.

- Open notepad

- Hold ctrl and alt and F10 (one by one in that order until all 3 are held down) for 3 seconds then release
- A menu will appear in notepad
- Press 2,4,2,0,0

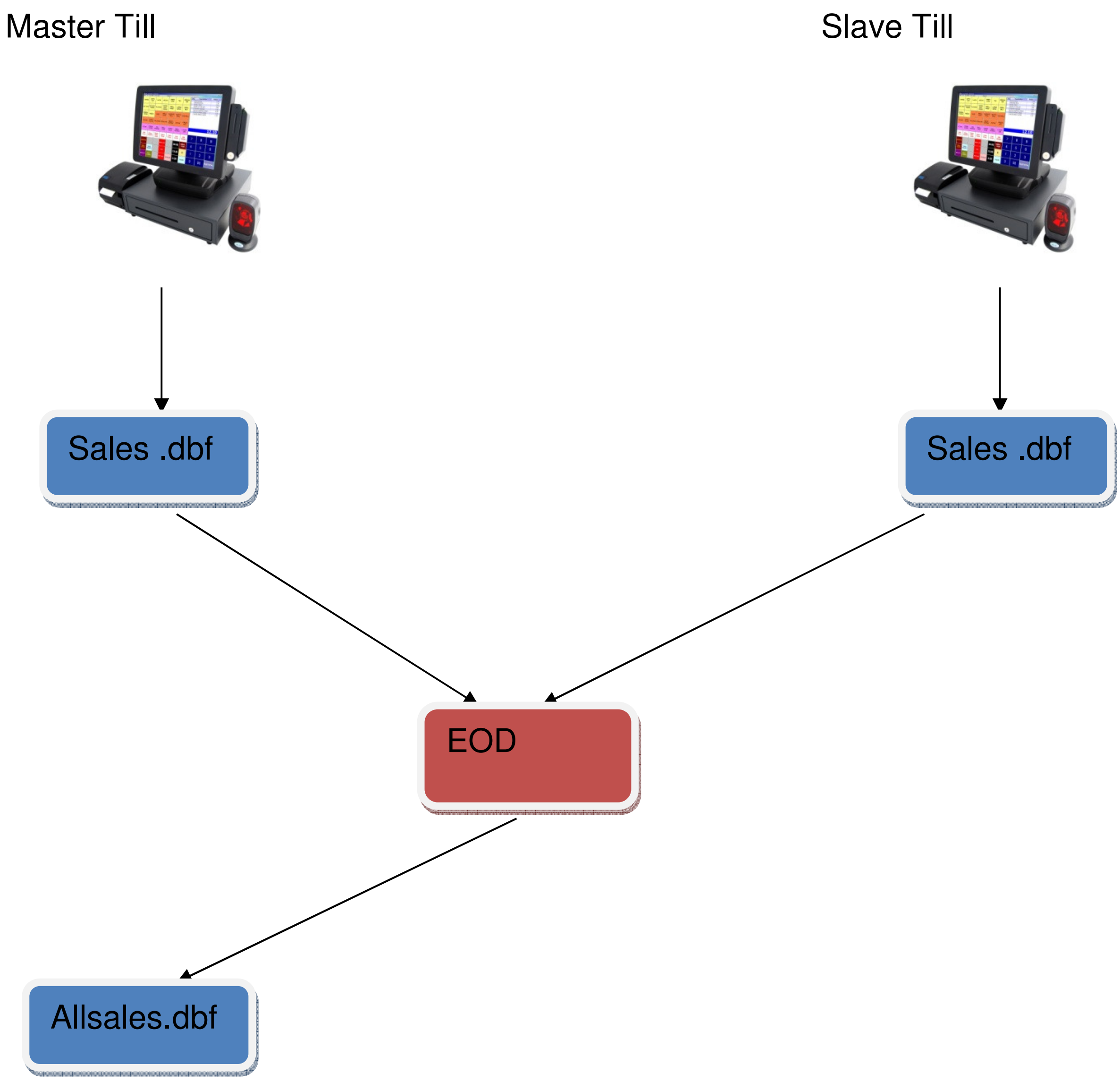
There are two models of the new card swipe, both can be programmed in notepad, but there is no way of telling the difference without opening them up. The latest version can also be programmed with the msr212 utility as follows

- Install the utility and run
- Click read from eeprom
- Untick "transmit ss/es"
- Click write to eeprom

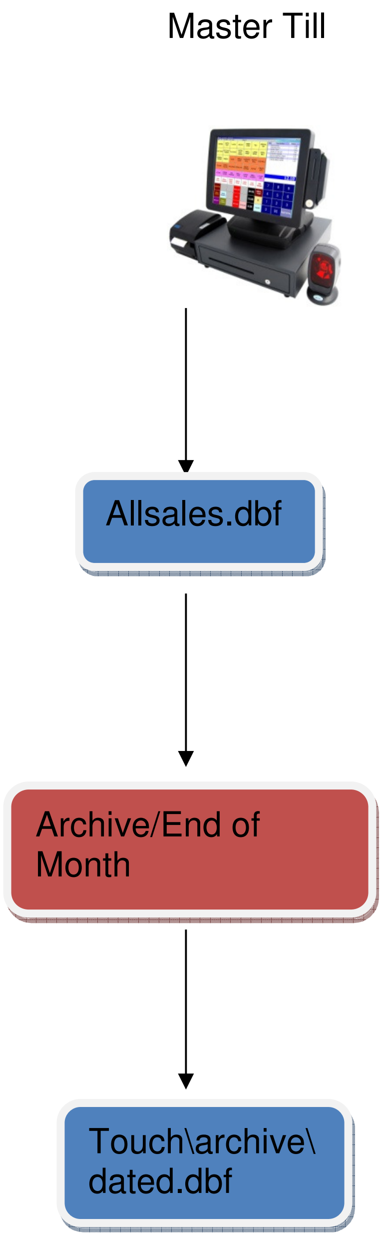
Sales/EOD/Backups

Sales Data

Daily Sales Information



Monthly/Archive Sales Information



End of Day and Backups

At end of day c:\touch\eod.bat is run, if you were to edit this batch file it actually runs the command c:\touch\cestsbackup.exe

☝	It is recommended that eod.bat is deleted on slave machines as there is no useful data to back up

When run; cestsbackup will copy the entire touch folder to c:\backup\datedfolder. This will keep the backup for 30 days deleting ones that are older than this.

☝	Older systems have xcopy c:\touch** c:\backup instead

The disadvantage of backing up to the C drive is that if the drive blows and rendered unusable you will lose your back up as well; a solution to this is to install pos1utility which allows you to change the path it backs up to, this means that you can set up a mapped network drive to a slave machine and back up to there

Installation Checklist

Please print these sheets out and use them as an aid for a successful installation

Pre Installation

- Ensure the correct cabling exists ❑
- Order the tills – specify that it is for CES Touch ❑
- Order the Dongle for the back office pc ❑
- Obtain import information from customer ❑
- Obtain the Licenses from CES ❑
  (at least 24 hrs before install)

Kit Preparation
We recommend having the following on a USB key so that you can deal with any eventuality; customer program, crystal installer, touch installer, latest touch patch, cash drawer drivers (scale drivers, USB printer drivers, modem driver if applicable)

- Verify it is the correct till and has a hard drive not compact flash ❑
- Check the dallas key (card swipe) ❑
- Verify that crystal and touch are installed ❑
- Install the CES Touch software and crystal on the back office machines ❑
- Copy customer program onto all machines ❑
- License the Terminals ❑
- Set Num terminals ❑
- Network the Terminals ❑
- Install Peripherals, scanners, printers etc ❑

Testing

- Verify that held sales are picked up on all tills ❑
- Verify that reports show all till sales for all terminals ❑
- Cash drawers are firing ❑
- If applicable, labels print barcodes ❑

Daily Task List

Power on Master till – wait to finish loading ❑

Power on slave tills one by one ❑

If no EOD has been run from the previous evening run EOD ❑

Enter Float as Paid In ❑

Ensure Clock In function is used if applicable ❑

Carry out daily sales and functions ❑

Ensure all refunds and voids are processed correctly on the tills ❑

Ensure Clock Out function is used if applicable ❑

Run EOD on slave tills, cash declaration and exit software use start, shutdown, turn off computer ❑

Run EOD procedure on Master Till ❑

Monthly Task List

Software prompts for sales archive on the 1st of each month this should be done ❑

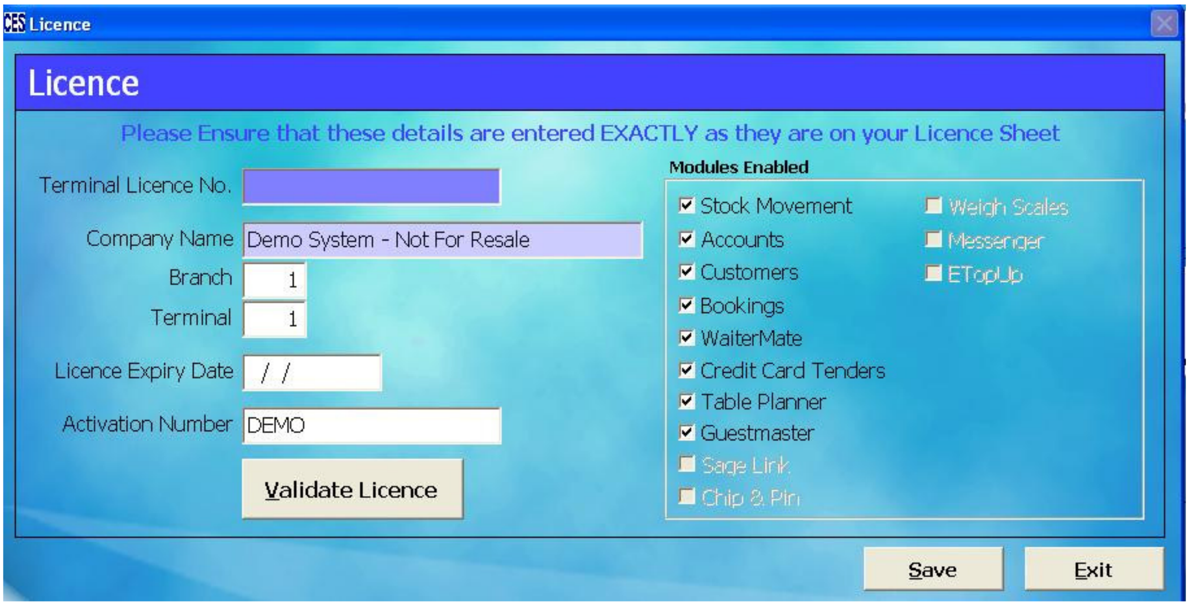
Statement Run for Accounts ❑

Carry out Stock Take (if applicable) ❑

Demo Mode

The CES Touch system can be run in demo mode this is useful when you are trying to replicate issues that a customer may have.

To set Demo mode
Select Back Office >> Utilities >> system Menu >> Settings >> Licence
Blank out the ‘Company Name’, ‘Licence Expiry Date’ fields and enter ‘DEMO’ into the ‘Activation Number’ field
Select Save to save and exit

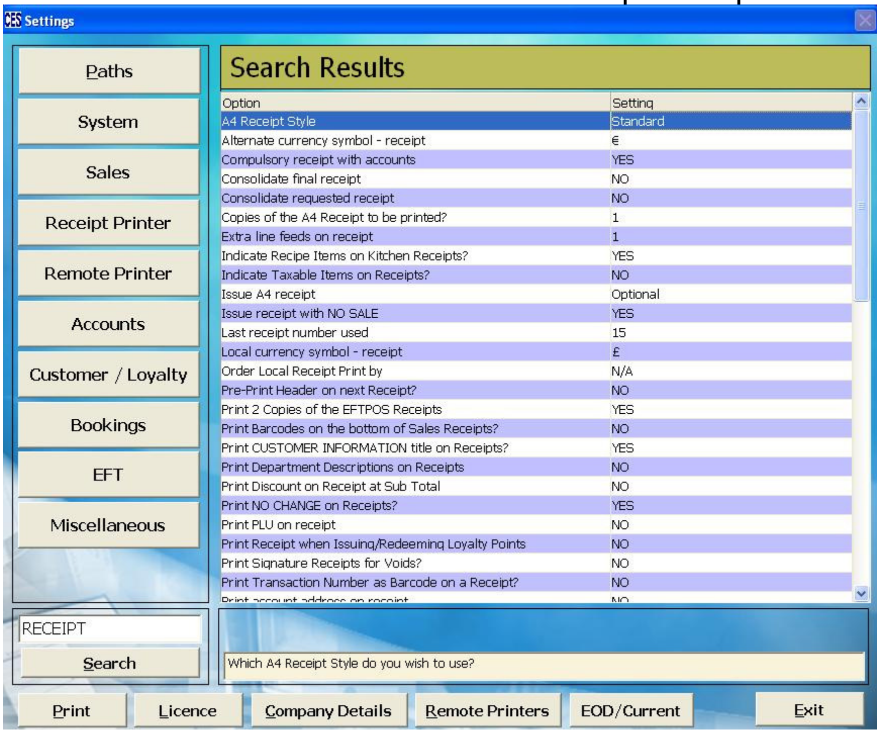


A system running in demo mode will be run as ‘Till 1’, displays a maximum number of 25 records on any reports, and can only issue up to 50 receipts (Receipt numbers 1 – 50)

☝	When 50 receipts have been printed, you will have to reset the receipt number back to 1 to continue issuing receipts, otherwise the system will send you to back office after every sale

To set the receipt number back to 1

- Select Back Office
- Utilities
- System Menu
- Settings
- Use the search box with the word ‘Receipt’ and press search twice



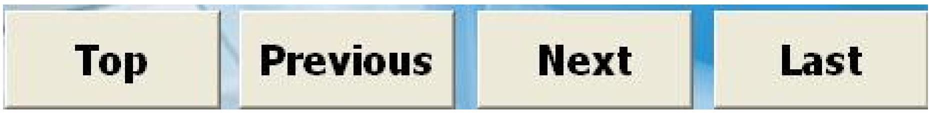
- Double click on

Change the number to 1

Back Office

General Information

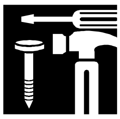
Navigation



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

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

Exit – exits the CES Touch Software



Edit by Grid

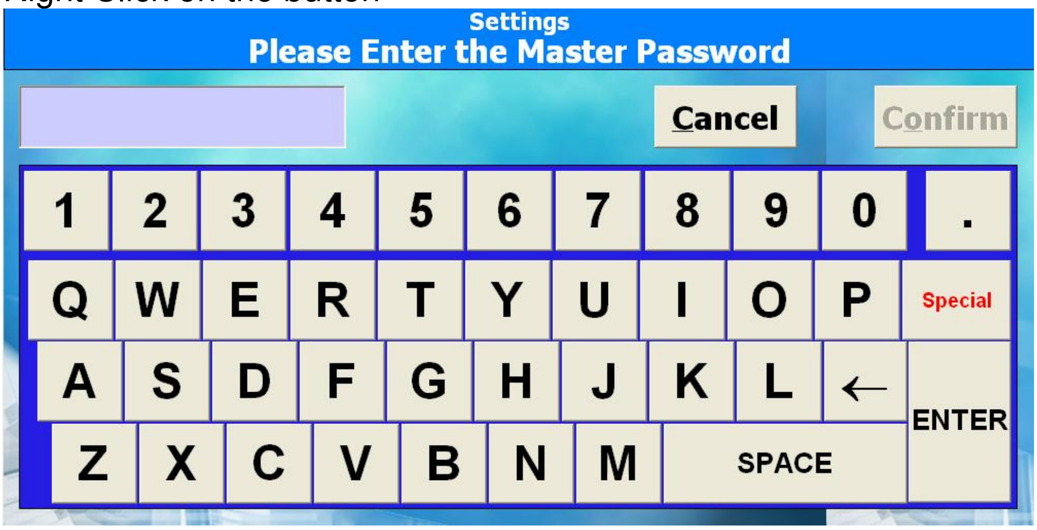
The edit by grid function allows you to write straight to the database and there is no validation when the information is stored; therefore we recommend that this is not used as corruption of the database is likely

In Back Office some of the option buttons can be password protected e.g. you will not want the End User accessing Settings, Database etc. They come without passwords by default.

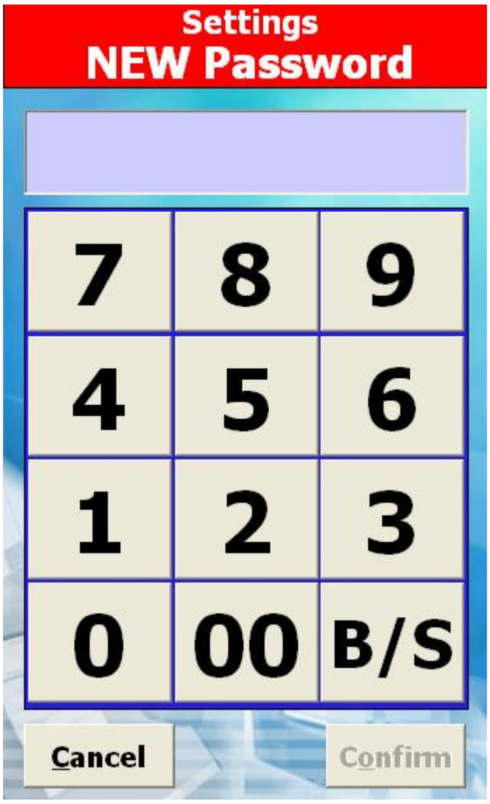
To Activate the Password

The option you want to protect

- Right Click on the button



- Enter the Master Password 1066 (as in settings unless altered) and press confirm
  You will be asked for a new password

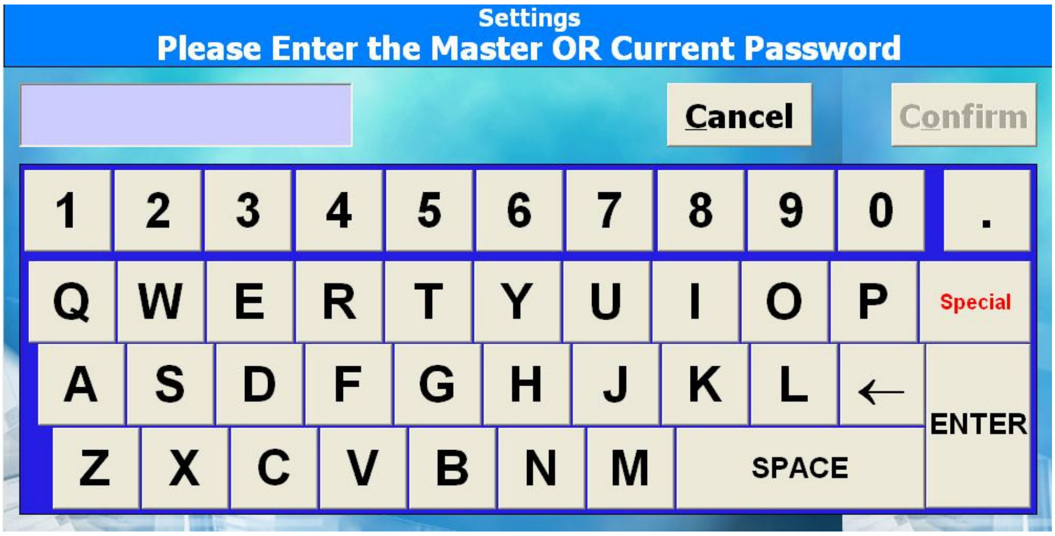


- Enter the password and select confirm

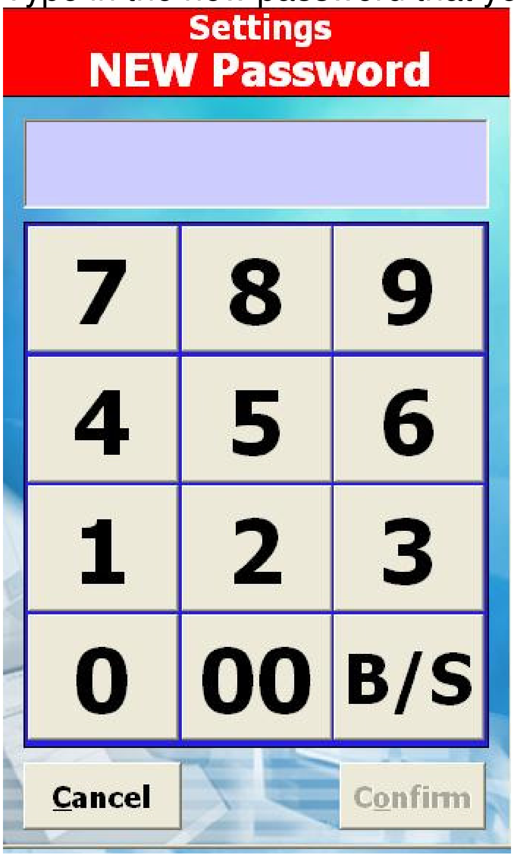
The password option will be set so each time the option is selected you will be asked to enter a password

Remove a Password

- Right click on the option you want to remove the password from



- Type in the new password that you set and press enter



- Select Cancel

- Select Yes to remove the password

Products

The Product Database

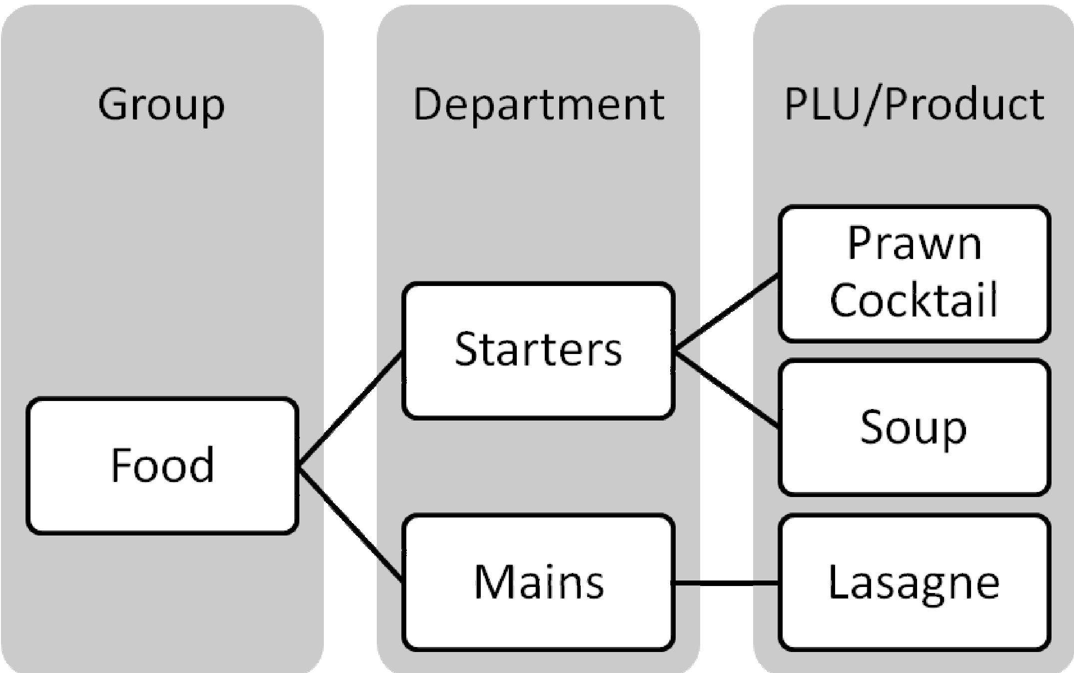
The Product Database should be regularly maintained with key information such as cost and retail prices. The product database is divided into 3 areas; Groups, Departments and PLUs (products).

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

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

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

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



How to create a new PLU/Product

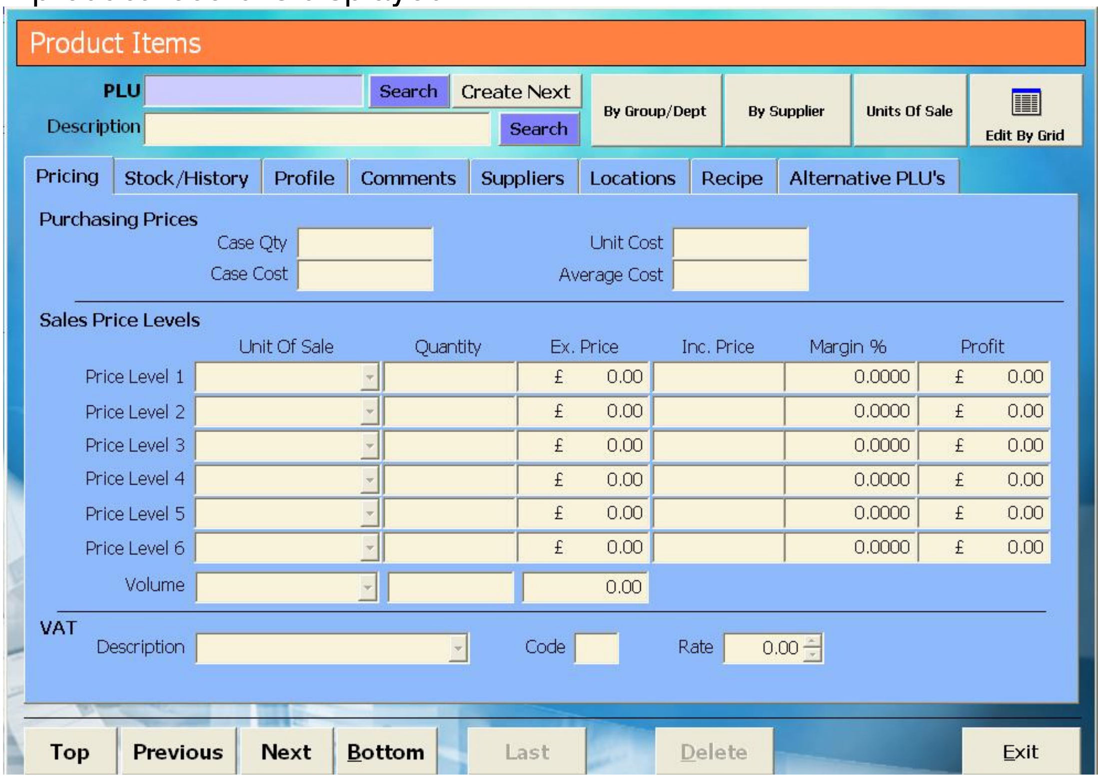
☝	You can also create products on the fly in sales mode – see Functions section

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

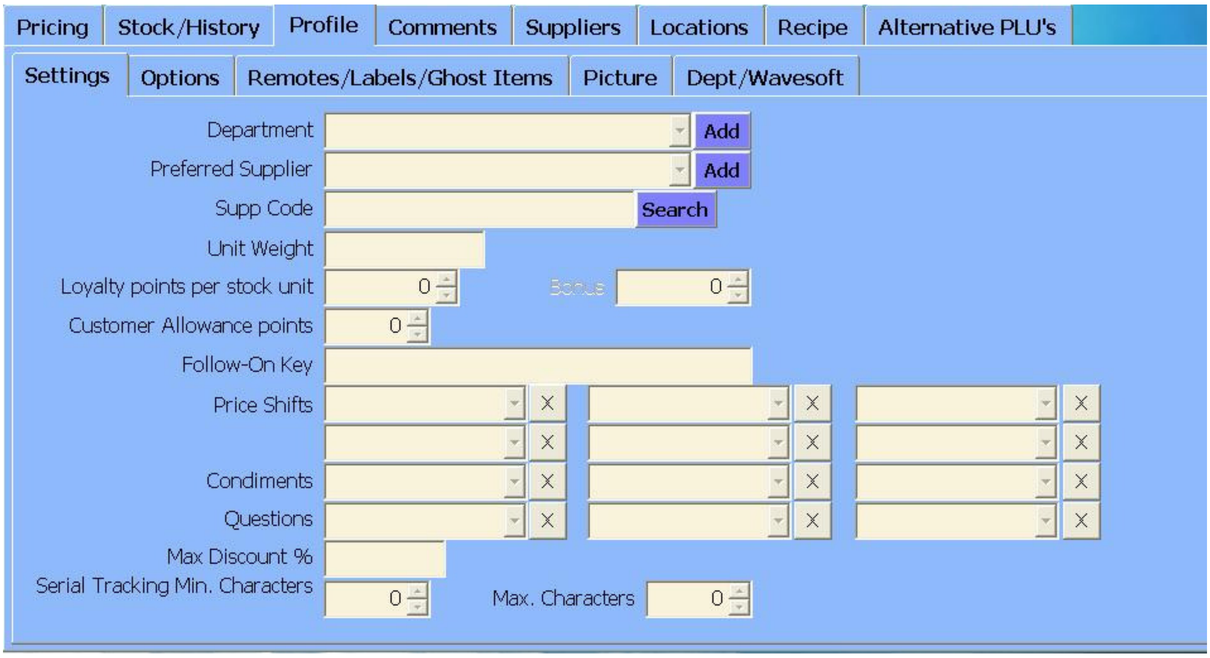
- Select

- Select

A blank product record is displayed



- Enter the PLU number (barcode) or if not being used in conjunction with a scanner enter the name of the product – this is limited to 14 characters, defaults to uppercase and is shown on reports
- Press Enter, if you wish to create this product select Yes, if a product with the PLU already exists you will be taken to that record
- Enter the description of the product – this is limited to 30 characters and is shown on reports
- In the price levels section enter the retail price for the relevant sale sizes and price levels
- Select the ‘Profile’ tab



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

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

Editing existing Product

- Select

- Select

- Enter the PLU or description of the product or use the search boxes and press Enter

The Product record is displayed, from here you can edit information such as prices, reporting department, name

	The PLU field cannot be edited

- Once all changes have been made select Save

	Any changes made will take effect immediately

Deleting a Product

- Select

- Select

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

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

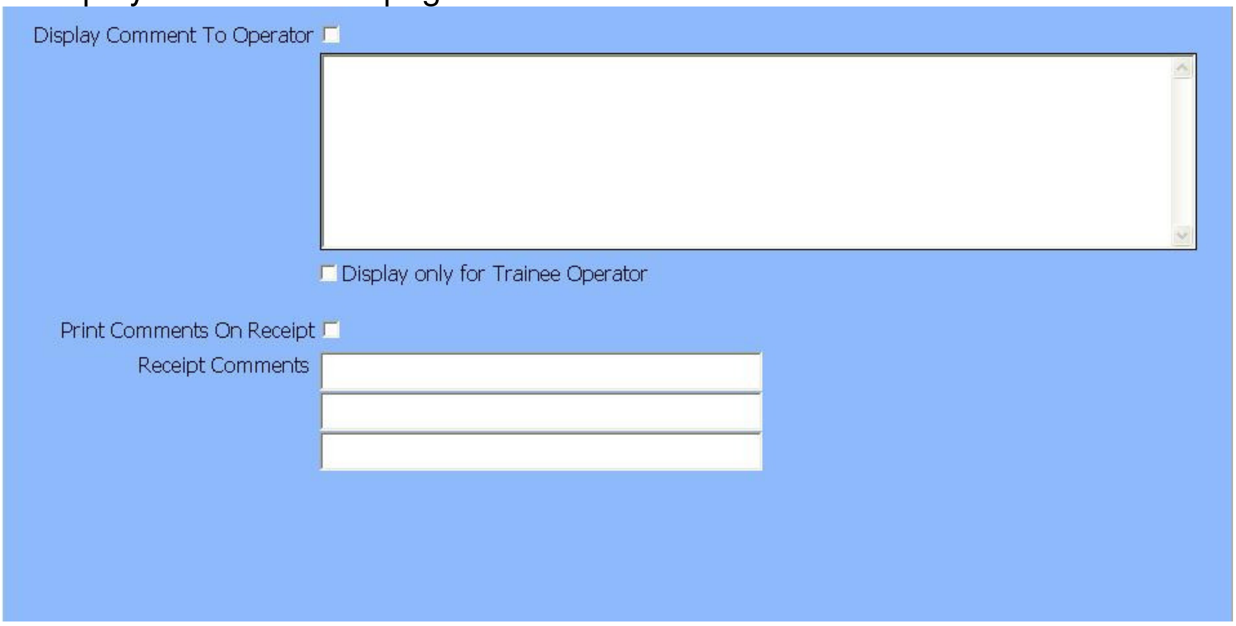
	The deleted product can still be reported on historically
	If the PLU has more than one barcode use ‘Alternative PLU’s’ tab to add the extra ones in – each barcode can have its own price

Add a comment

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

- Select

This will display the comments page



If the comment is to be displayed to the Operator only

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

If the text is only for a Trainee Operator

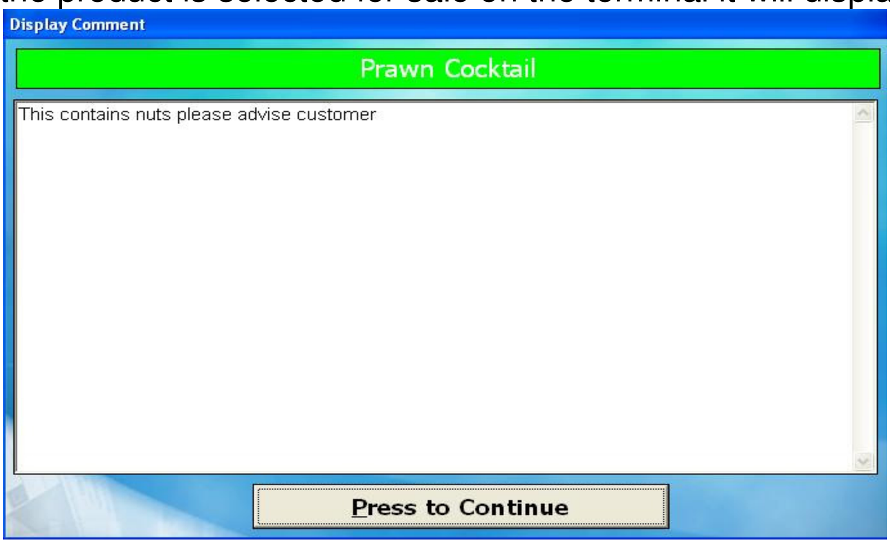
- Tick the display only for trainee operator box

If the comment is to print on a receipt

- Tick the print comments on receipt box

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

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



Enable Compulsory Receipts for a Product

- Select
  Options
- Tick
  Compulsory receipt issue ☐

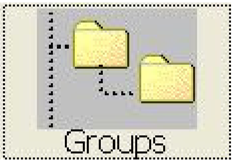
Every time this product is sold it will produce a receipt

Creating a new Group

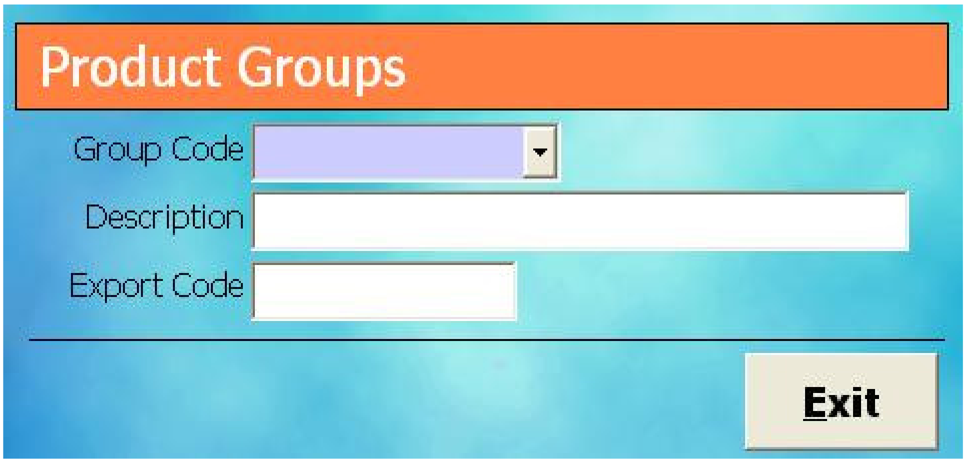
- Select

- Select

- Select



The Product Groups page will be shown



- Enter the group code (this can be a maximum of 18 characters)
- Press Enter

If the group code already exists it will take you to that code if not it will prompt if you want to add a new one

☝	You can check if it exists by using the dropdown selection box

- Enter the description of the group you are creating

☝	Export code is for exporting to Sage

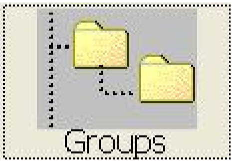
☝	Once the group is created you cannot change the code – you can only edit the description or delete the group (deleting the group will have adverse effects on the database)

Deleting a Group

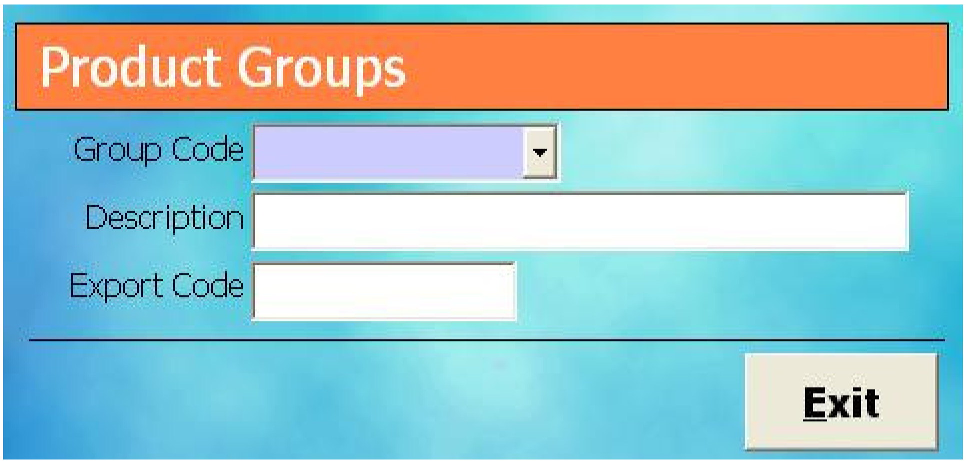
- Select

- Select

- Select



The Product Groups page will be shown



- Select the group to be deleted from the drop down box
- Select Delete

You will be asked to confirm that you want to delete this group

Departments

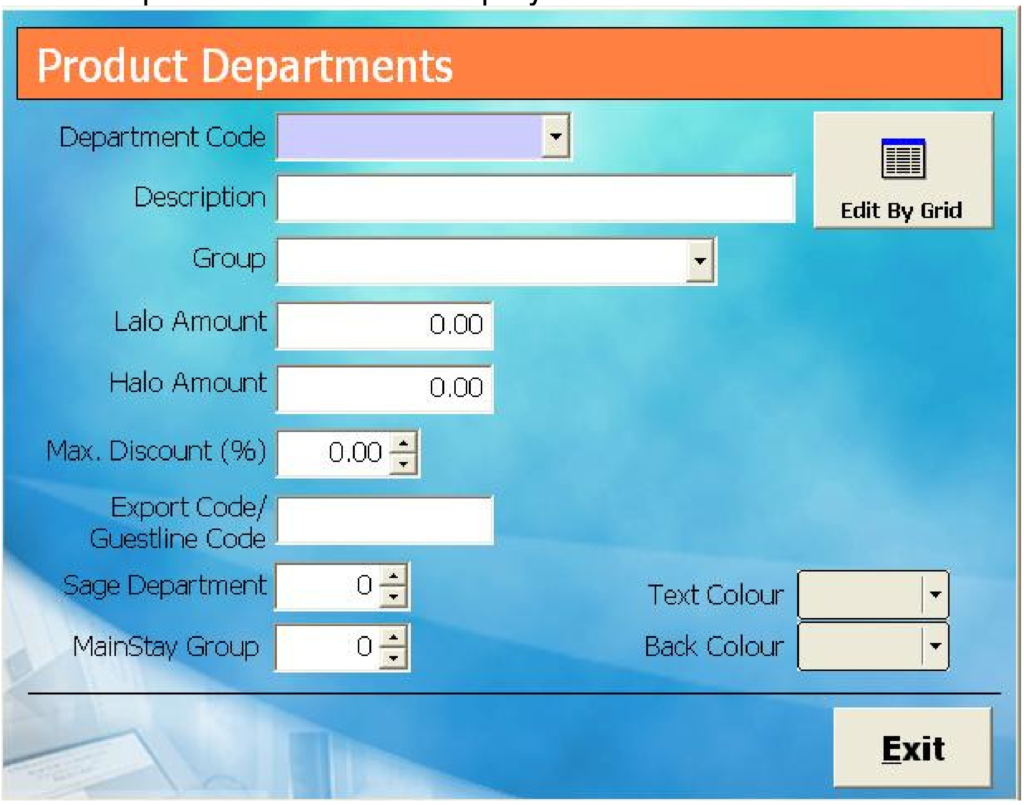
Creating a new Department

- Select

- Select

- Select

The Product department screen is displayed



- Enter the department code you want to create
- Press Enter

If the department code already exists it will take you to that code if not it will prompt if you want to add a new one

☝	You can check if it exists by using the dropdown selection box

- Enter the description of the department you are creating
- From the drop down box in the group field select the group that this department belongs to
- Lalo Amount = Low Amount Lock Out
- Halo Amount = High Amount Lock Out
- Max Discount (%) =
- Export code / Guestline code =
- Sage Department =
- Main Stay Group =
- Text Colour =
- Back Colour =

☝	Once the department is created you cannot change the code – you can only edit the description or delete the department (deleting the department will have adverse effects on the database)

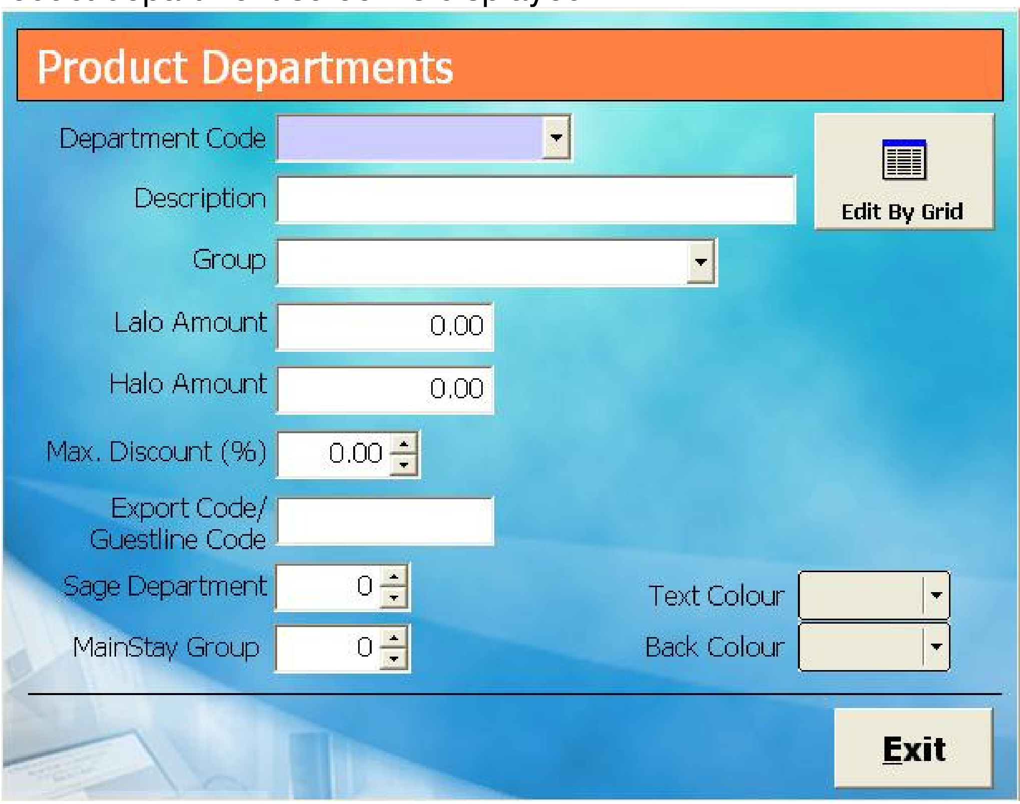
Deleting a Department

- Select

- Select

- Select

The Product department screen is displayed



- From the drop down box select the Department code you want to delete
- Select Delete

You will be asked to confirm that you want to delete this department

Price Shifts

	Disable Price Shifts **Default Price Level Offset**

Price Shifts is a tool to allow you to change the pricing structure on the tills for designated days and or time during a specified date period.

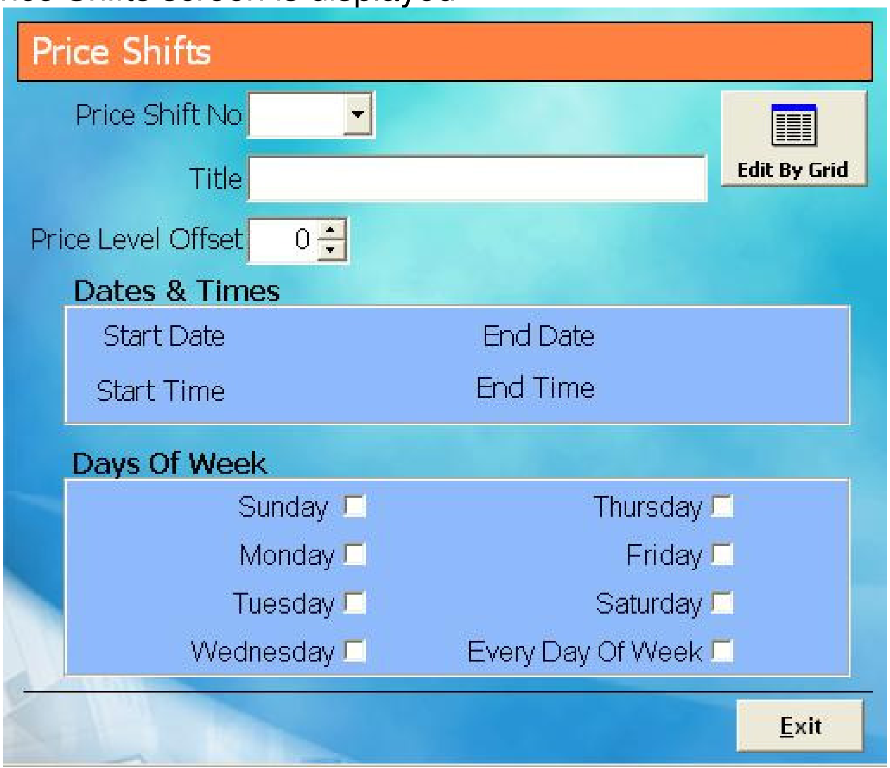
Setting up a new Price Shift

- Select

- Select

- Select

The Price Shifts screen is displayed

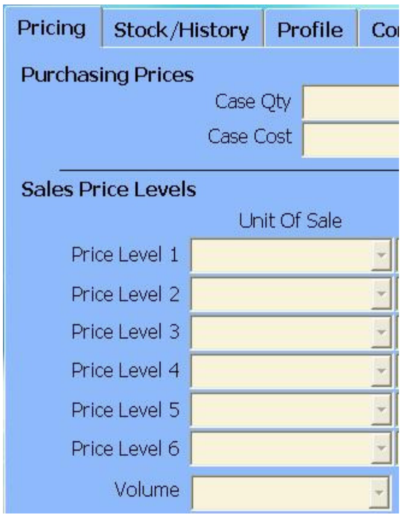


- Enter the unique Price Shift No

	If the Price Shift number already exists it will display the record for that shift if not you will be asked if you want to create a new price shift table

- Enter the title of the Price Shift you are creating *e.g. Happy Hour*
- Select the Price Level Offset 0-5

The Price Level Offset is the price level structure the shift looks at in the product table



e.g. If price level 1 was pint, price level 2 was half, a price level offset of 2 for a Happy Hour shift would mean that Happy Hour pint price = price level 3 and Happy Hour half price = price level 4

- Chose the Start and End Date and Times
- Select the days of the week the Price Shift will apply to
- Select Save to save the Price Shift

Editing a Price Shift

- From the drop down box select the Price Shift to be edited
- Change the details as required
- Select Save to save the changes

Deleting a Price Shift

- From the drop down box select the Price Shift to be deleted
- Select Delete
- Confirm you want to delete the Price Shift

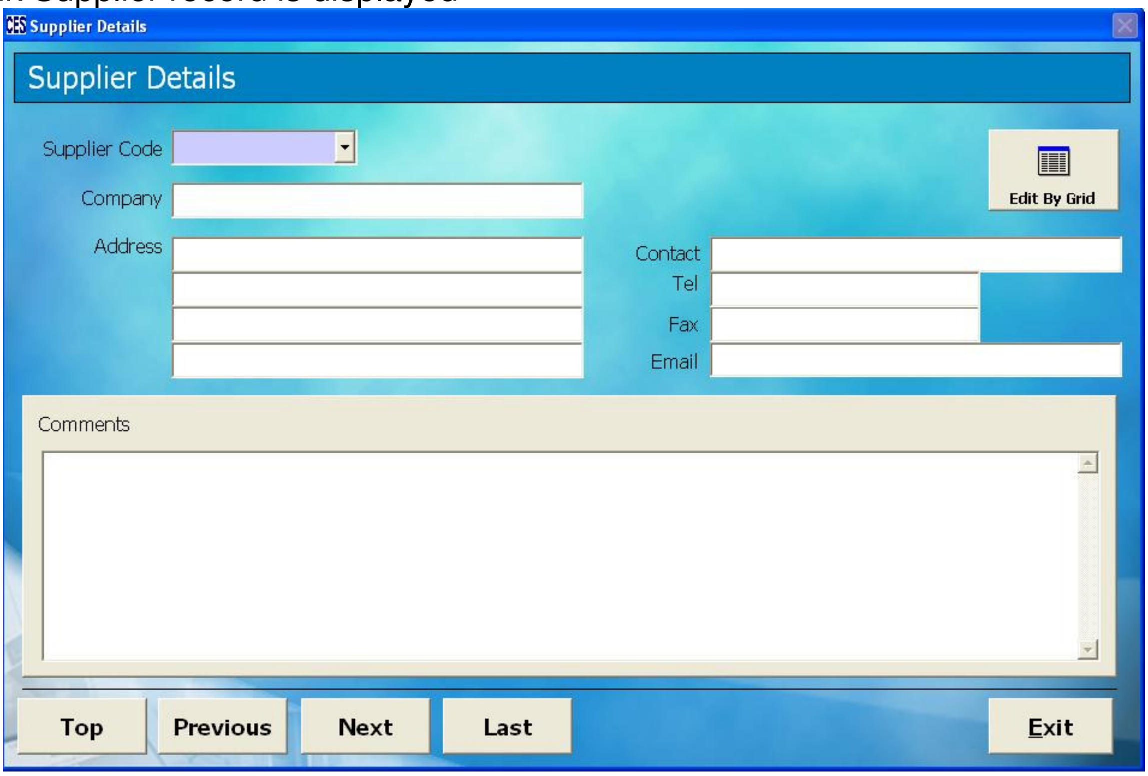
Suppliers

Creating new Supplier

- Select

- Select

A blank Supplier record is displayed



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

☝	This is the only mandatory information; you can however fill in the other fields, this information will be shown in the supplier list report.

Editing an existing Supplier

- Select


- Select


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

Deleting a Supplier

- Select


- Select


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

Condiments

	Remove 'Extra' from condiment descriptions

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

Creating a new Condiment

- Select

- Select

A blank Condiments record is displayed

- Enter the unique condiment number (you can see the last one used by looking in the drop down list)
- Press Enter, if you wish to create this Condiment select Yes, if a Condiment with the code already exists you will be taken to that record
- Enter the title of the condiment e.g. Cooking Instructions or Shoe Colour
- Press Enter
- In the first field type the first selection you would like to see in your list
- If this is not a compulsory selection remove the tick from the ‘Compulsory’ box
- Once all the options have been entered select Save, if you do not wish to Save this select Abort

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

Editing a Condiment

- Select

- Select

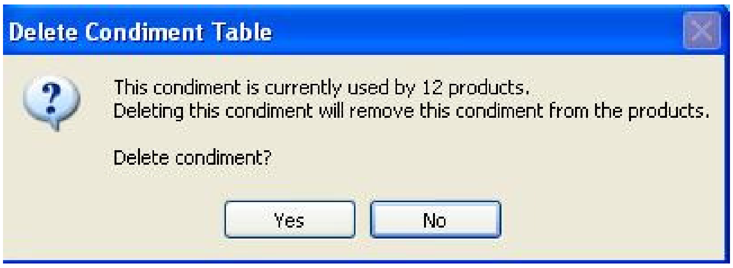
- From the drop down box select the Condiment to be edited or type in the condiment number and press enter
- Edit the information as required
- Select Save

Deleting a Condiment

- Select

- Select

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

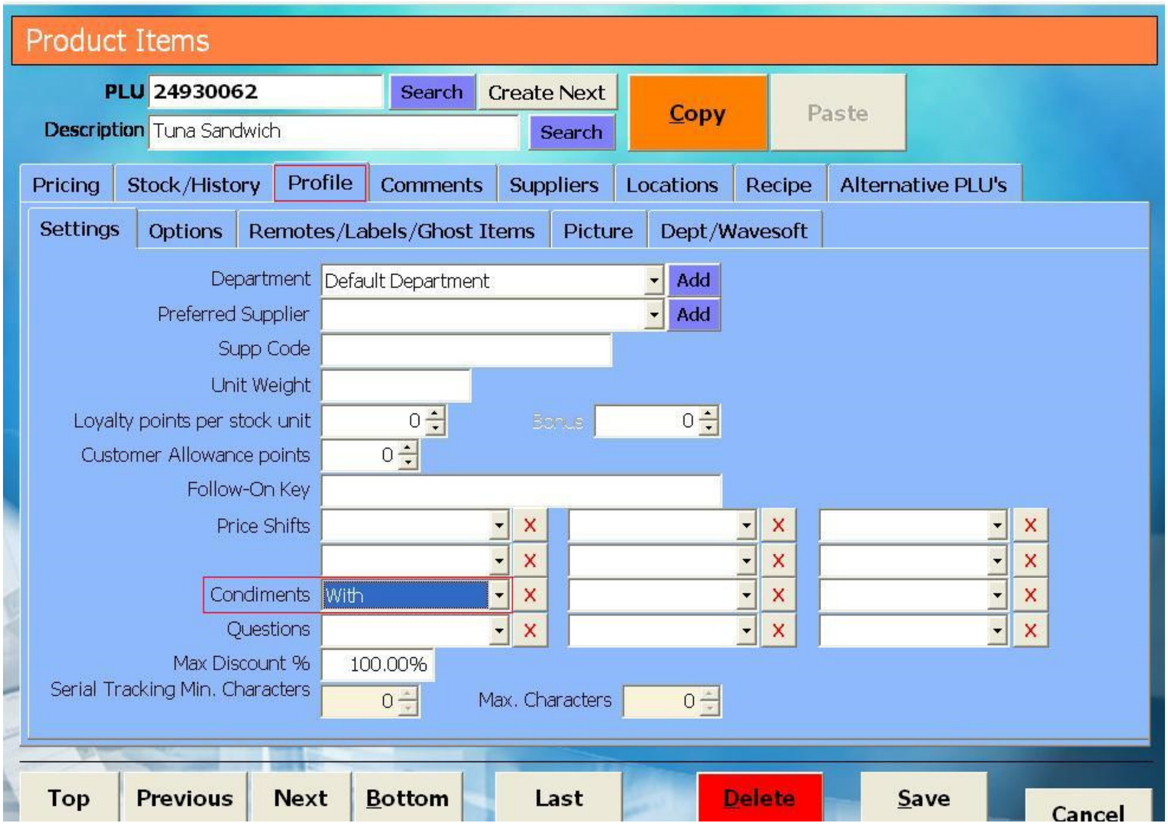


- If you are sure you want to delete it select Yes if not select No

Attaching a Condiment to a Product

- Select Products

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



- Select Save

Removing a Condiment from a Product

- Select Products

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

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

	These print on remote printer tickets only

Menus

	Department Menu Version

Menus are buttons on the tills that display predefined products *e.g. all pasta dishes or all type of shoe.*
There are 2 different of menu display available version 1 is the list style, version 2 fills the screen and changes the button size accordingly and has a number pad available

How to create a new Menu

- Select

- Select

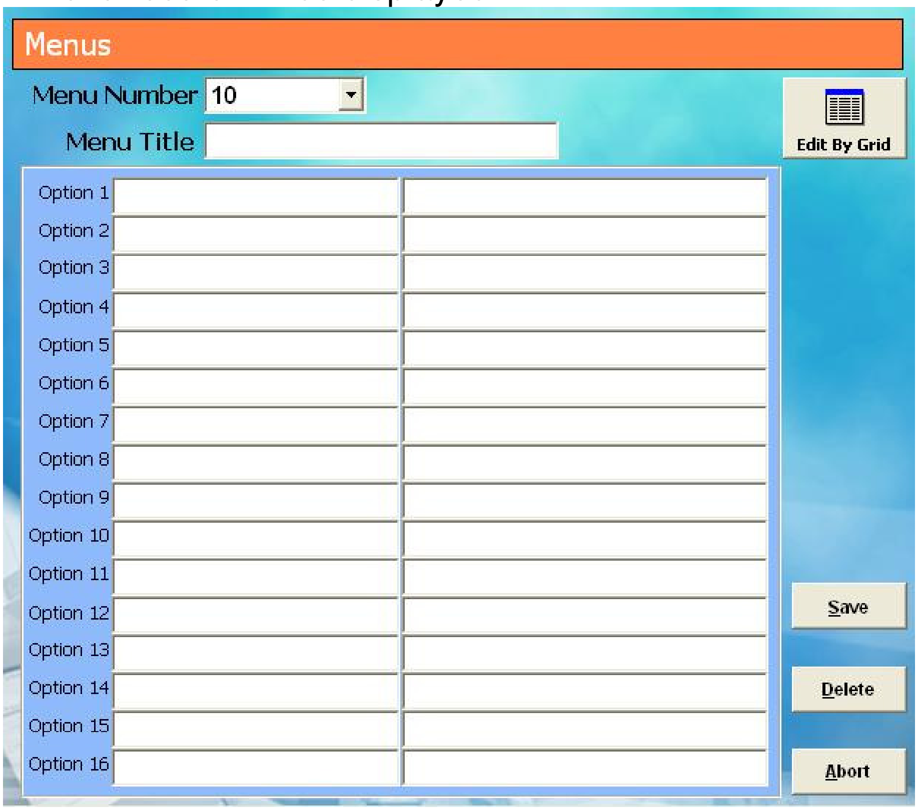
- Enter the unique menu number (you can see the last one used by looking in the drop down list)
- Press Enter, if you wish to create this Menu select Yes, if a Menu with the number already exists you will be taken to that record
- Enter the title of the Menu e.g. Pasta Dishes or Trainers
- Press Enter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

To edit an existing Menu

- Select

- Select

A blank menu record will be displayed



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

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

To delete a Menu

- Select

- Select

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

Questions

	Print Question Title with Answer

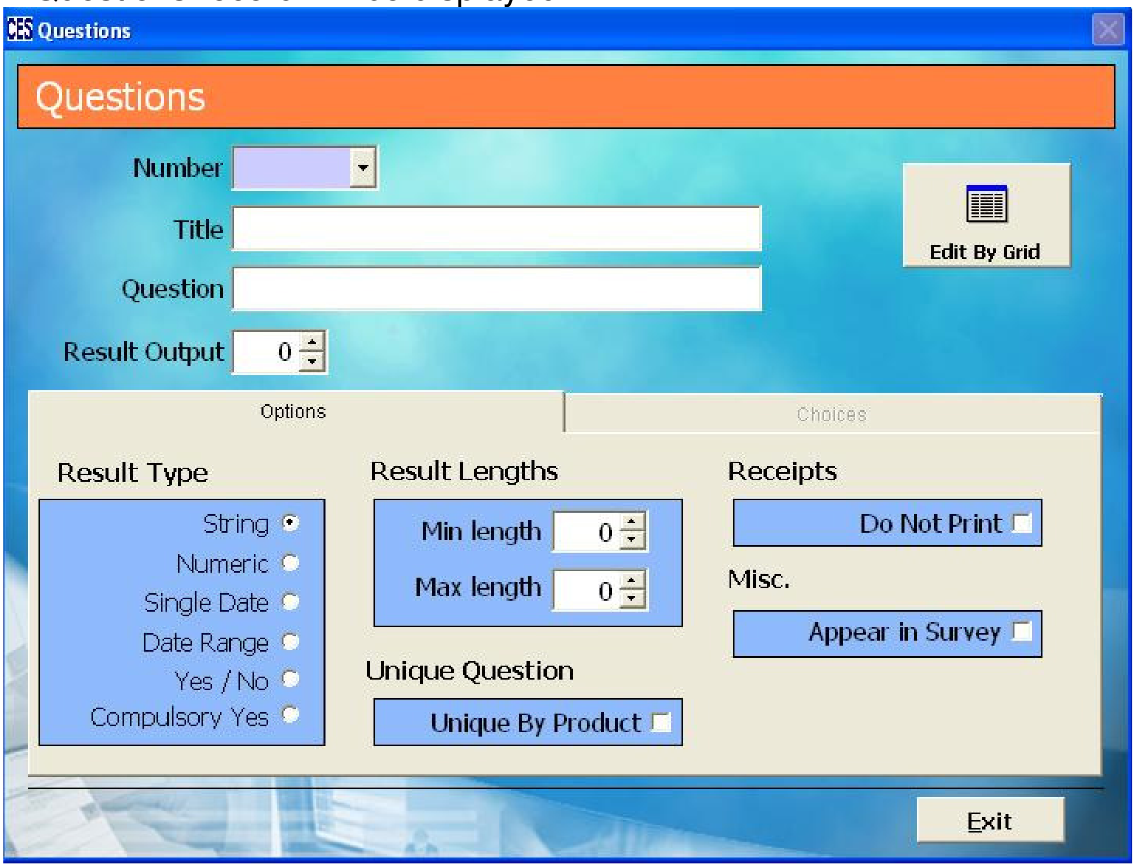
Questions can be used in several ways e.g. in the bar environment they can be used to prompt the user to check for ID when selling alcohol or in the retail environment to up sell; so if they are selling a pair of shoes would the customer like shoe polish?

To create a new Question

- Select

- Select

A blank Questions record will be displayed



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

Attaching a Question to a product

- Select Products

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

- Select Save

To remove a Question from a Product

- Select Products

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

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

Enquiry display is the function that gives the operator information about a selected product

Setting Up Parameters

- Utilities
- Enquiry Display

- Tick the information you want to appear on the terminal

	You may not want operators to view cost prices for example

Using the example above this is how it displays

Product Enquiry - Stock Details

Fields	Infomation
Product Code	FOSTERS
Product Description	Fosters
Group / Deparment	Wet / Draught
Current Stock	97.0000
Price 1	EACH 3.00
Price 2	NONE 0.00
Max Discount Allowed	50%
Operator Comments	
Date Last Sold	06/02/2008
Date Last Order	18/01/2008

Use the scroll bar to display the rest of the information

Operators

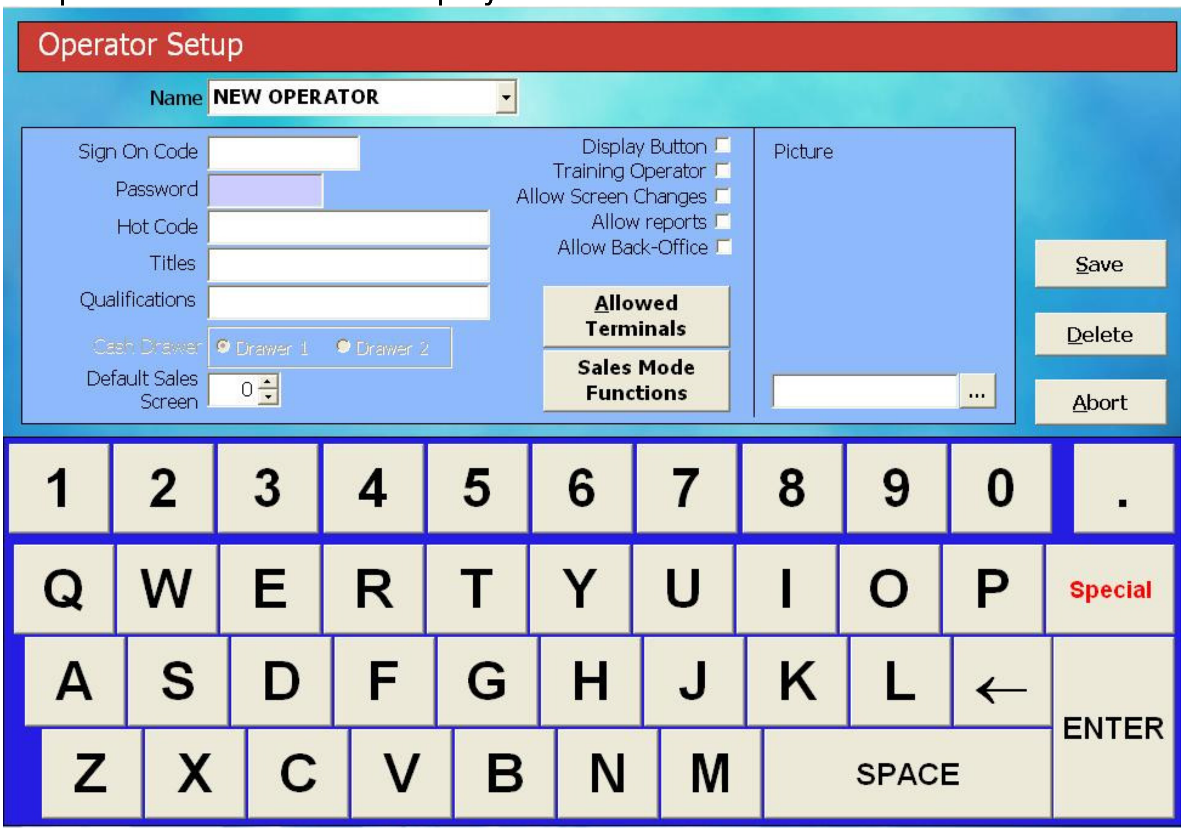
Operators are till users who are or are not given permission to carry out functions on the tills

To create a new Operator

- Select

- Select

A blank Operator record will be displayed



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

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

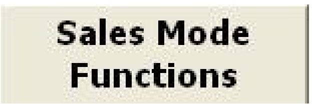
- Enter a ‘Password’ to be used in conjunction with ‘Manual Log On’

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

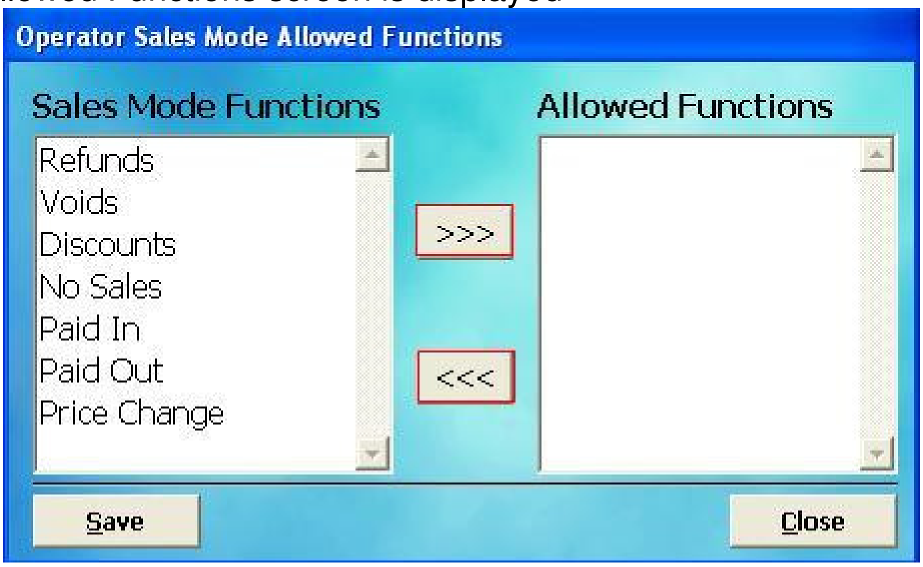
Sales Mode Functions – This is the option that gives operator permissions on the terminal when in Sales Mode

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

- Select



The Allowed Functions screen is displayed



- From the window on the left, select the Function to be allowed
- Select the  to move the Function in to the Allowed Functions window
- Select Save

You have now successfully set up a new operator

To edit an existing Operator

- Select

- Select

A blank Operator record will be displayed

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

To delete an Operator

- Select

- Select

A blank Operator record will be displayed

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

Receipt Set Up

	A4 Receipt Style
	Compulsory Receipt with Accounts
	Consolidate Final Receipt
	Issue Receipt with No Sale
	Print PLU on Receipt
	Print Receipt When Issuing/Redeeming Loyalty Points
	Print Signature Receipt for Voids
	Print Covers on Receipt
	Print Loyalty Points on Receipt
	Print Receipt After Each Transaction
	Print Refund Reason On Receipt
	Print Void All Receipt
	Print Zero Priced Items On Receipt
	Receipt Port Number
	Use Gift Receipts?

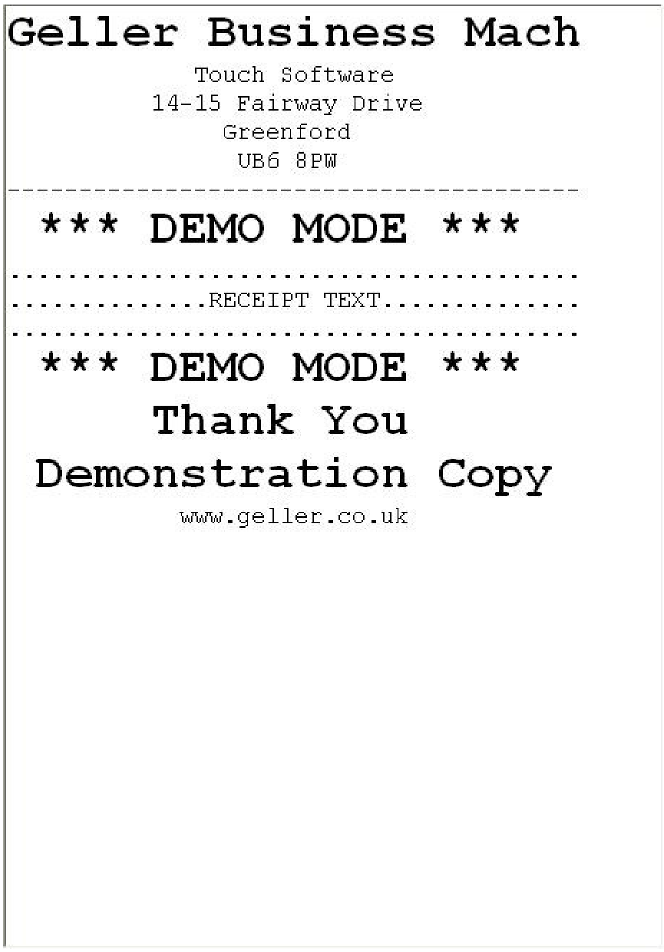
Setting the Header and Footer for Receipts

- Select

- Select

This will display the Receipt Set Up screen

- Type the desired text into the relevant fields and select the text size from the drop down boxes on the right
- Selecting Print will print a copy of the text
- Selecting View will display the text on screen as below


Geller Business Mach
Touch Software
14-15 Fairway Drive
Greenford
UB6 8PW

*** DEMO MODE ***
....
..............RECEIPT TEXT..............
....
*** DEMO MODE ***
Thank You
Demonstration Copy
www.geller.co.uk

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

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

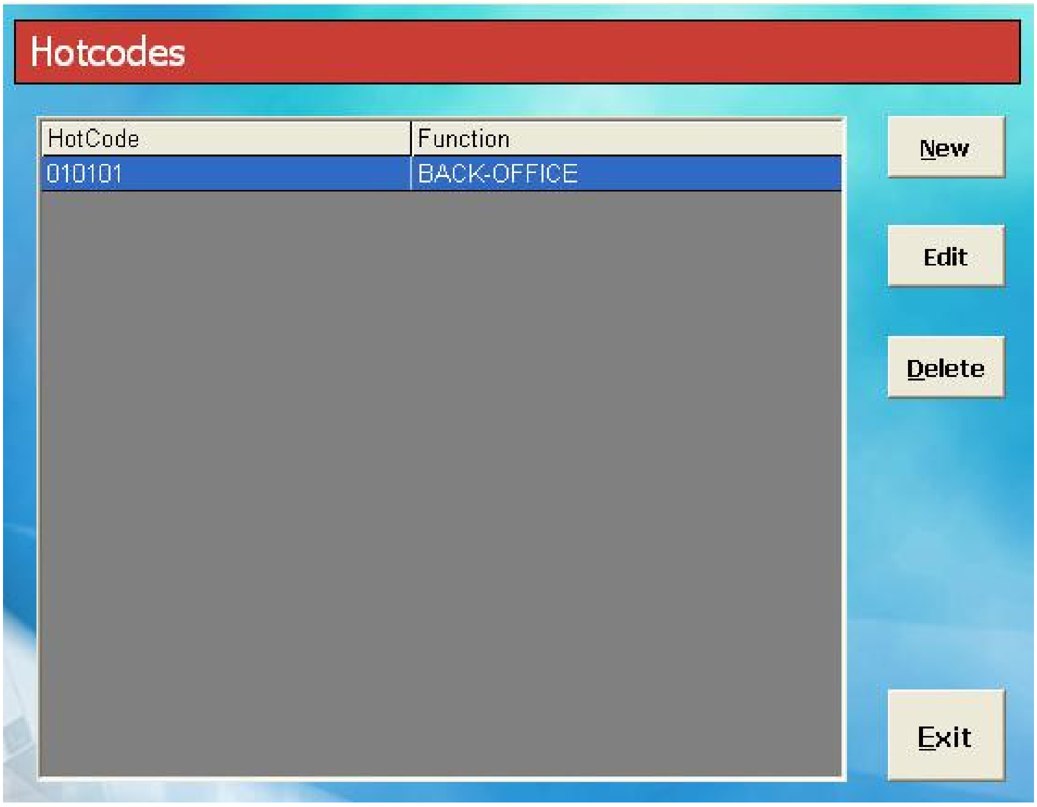
Hotcodes

Report Hotcode Usage to Sales File

Hotcodes are for quick access to a particular function; they can be alpha numeric

Creating a new Hotcode

- Utilities
- Hotcodes



- Select New

- Type in the text you want to use as the Hotcode in the Hotcode field

☝	This should not be a potential product code or amount

- Type in the function (button functions) you want the Hotcode to carry out

In the example
Typing 010101 in Sales Mode would take the operator to the back office from sales mode subject to the normal rules of sales mode e.g. if you are in a transaction then you cannot exit to the back office or user permission

☝	If using Dallas keys the Hotcode 0000 Sign on/off needs to be present

☝	Hotcodes can also be dallas key numbers or swipe card numbers if these devices use a keyboard wedge interface

Editing a Hotcode

- Utilities
- Hotcodes
- Select Edit
- Make the required changes
- Select Save

Deleting a Hotcode

- Utilities
- Hotcodes
- Highlight the Hotcode to be deleted
- Select Delete
- Confirm you want to delete the hotcode

Reason Menu Set Up

	Print Discount Reason on Receipt **Print Refund Reason on Receipt** **Use Serial Tracking Reason Codes** **Voids Have Reason Codes?**

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

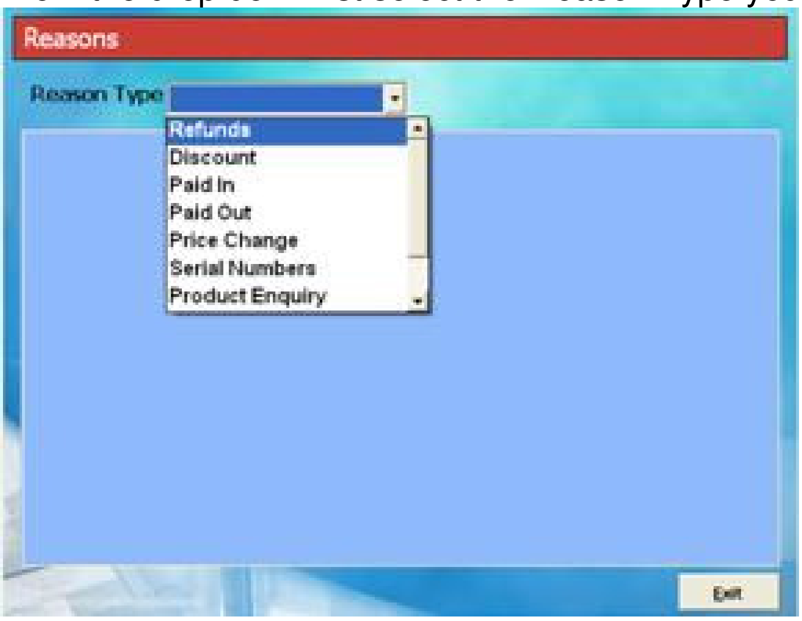
To add a value to a reason type

- Select

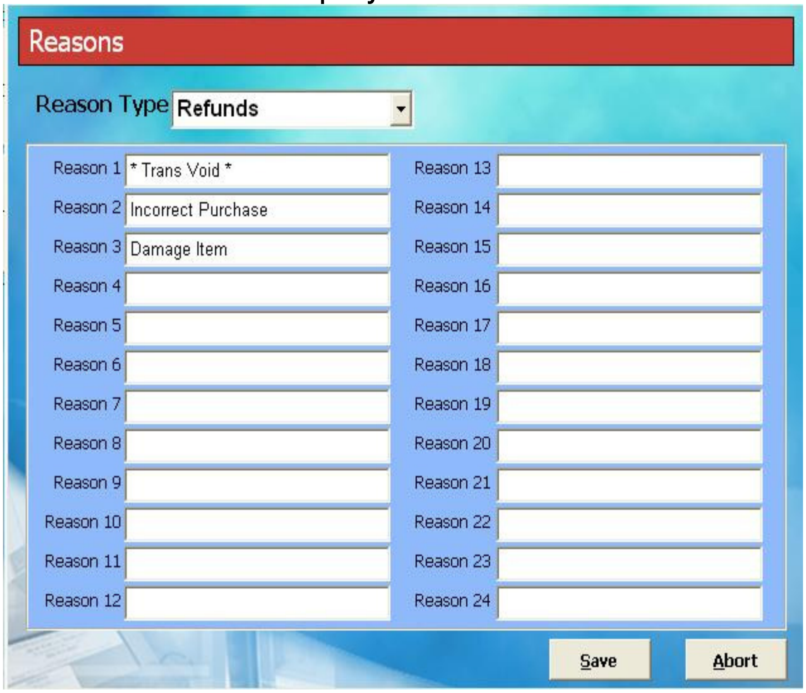
- Select

This displays the Reason Types Screen

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



The Reason values are displayed



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

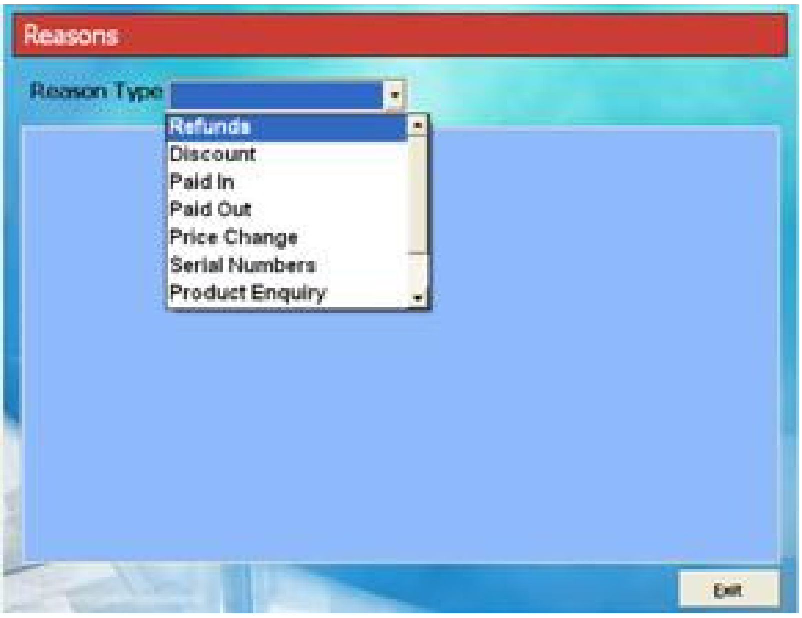
To remove a reason

- Select

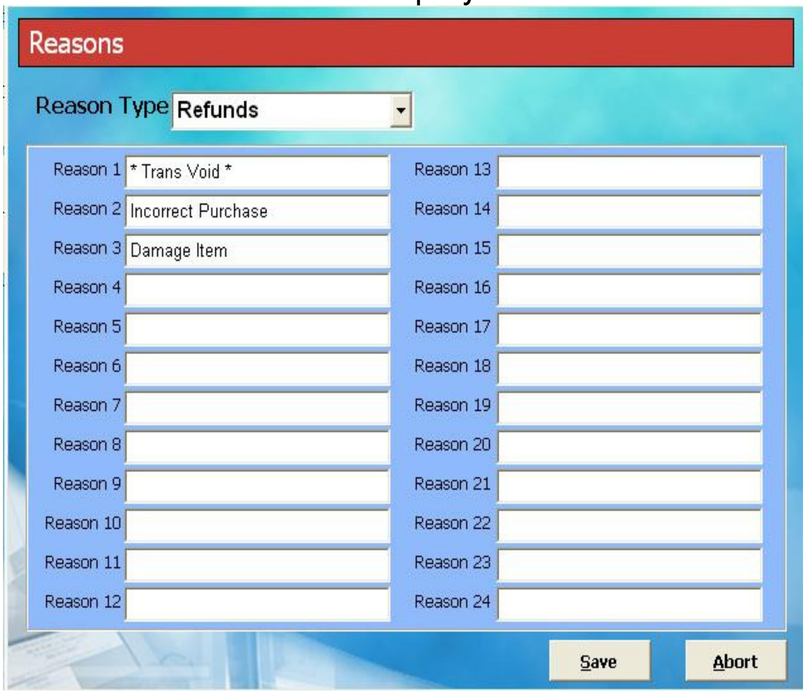
- Select

This displays the Reason Types Screen

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



- The Reason values are displayed



- Delete the text
  Select Save

Mail Merge Wizard

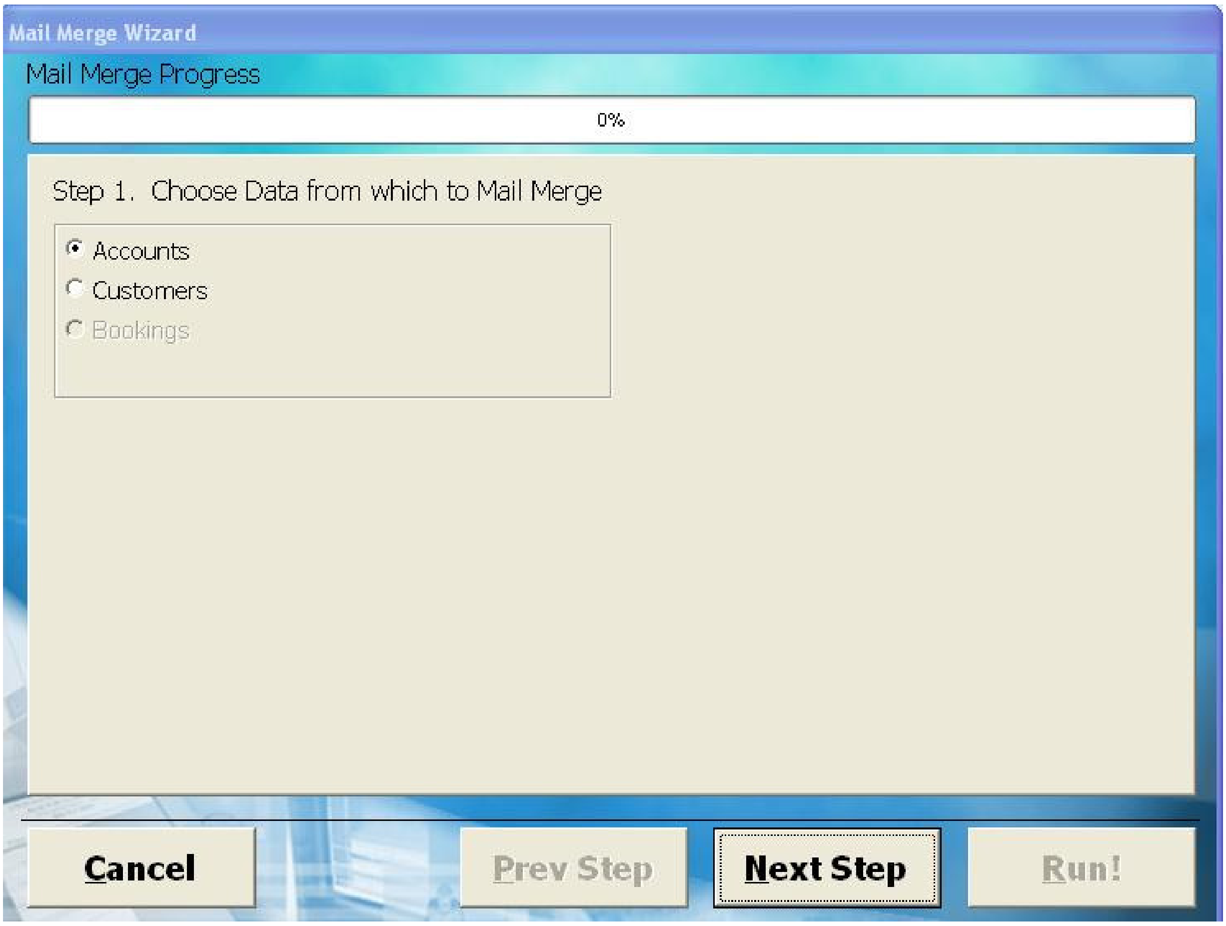
Mail merge wizard is a tool to export data held in the Account and / or Customer database to a csv file.

To Export Data

- Select

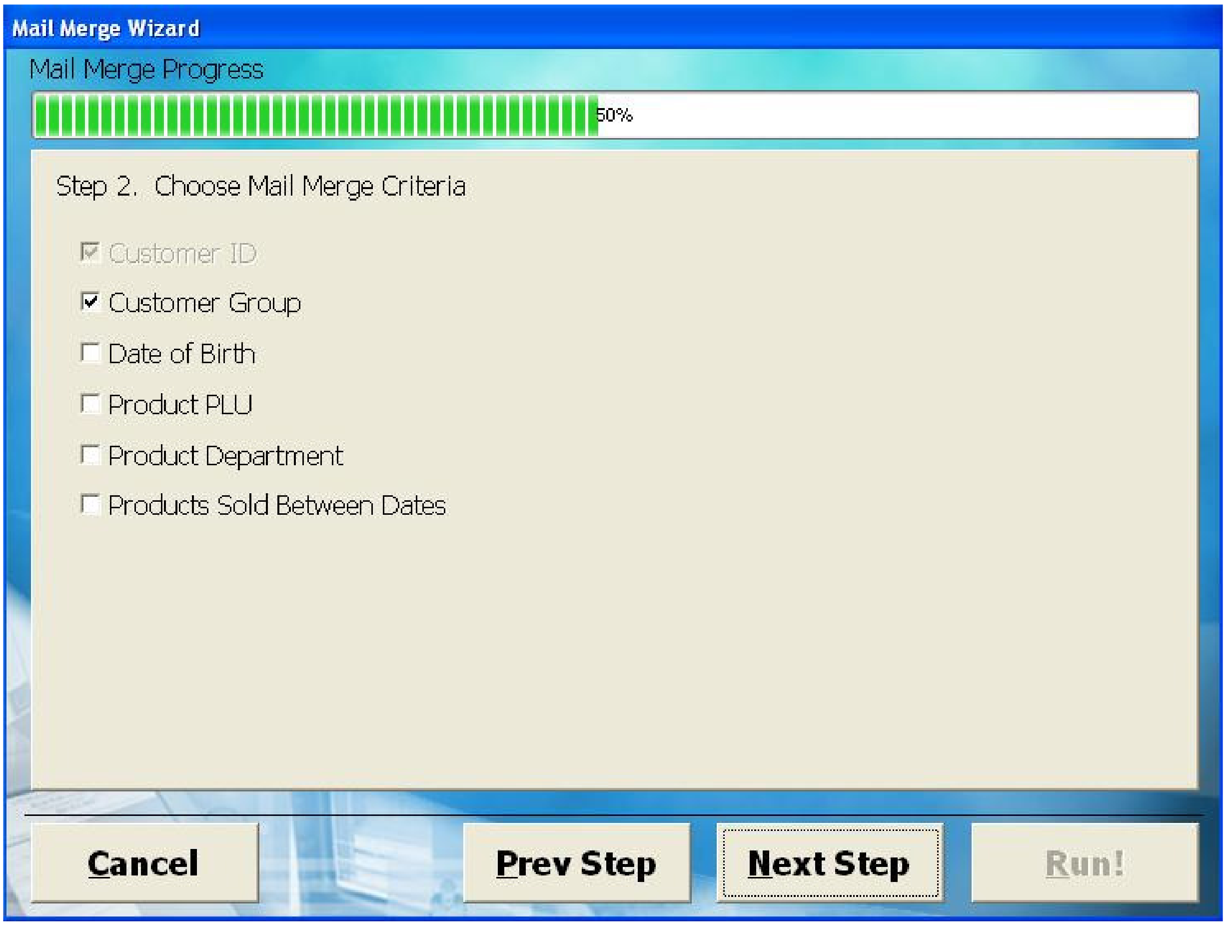
- Select

The mail merge wizard Step 1 page is opened



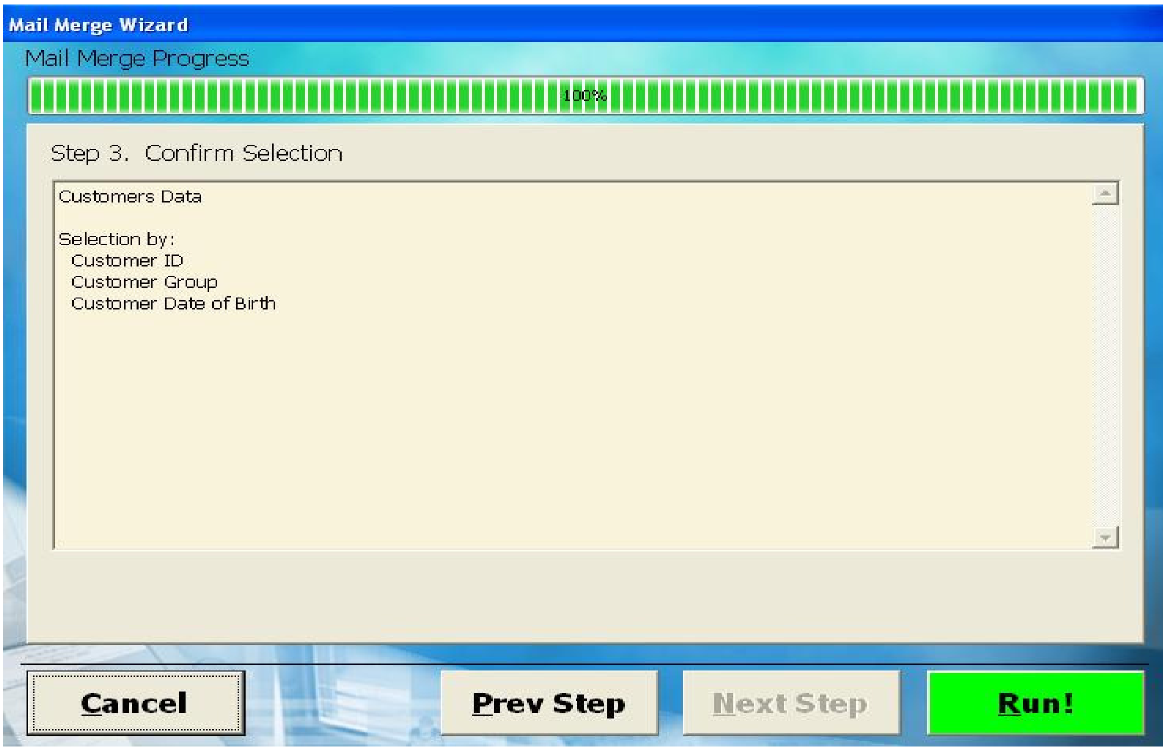
- Select the data group you want to capture the data from
- Select Next Step

Step 2 is displayed



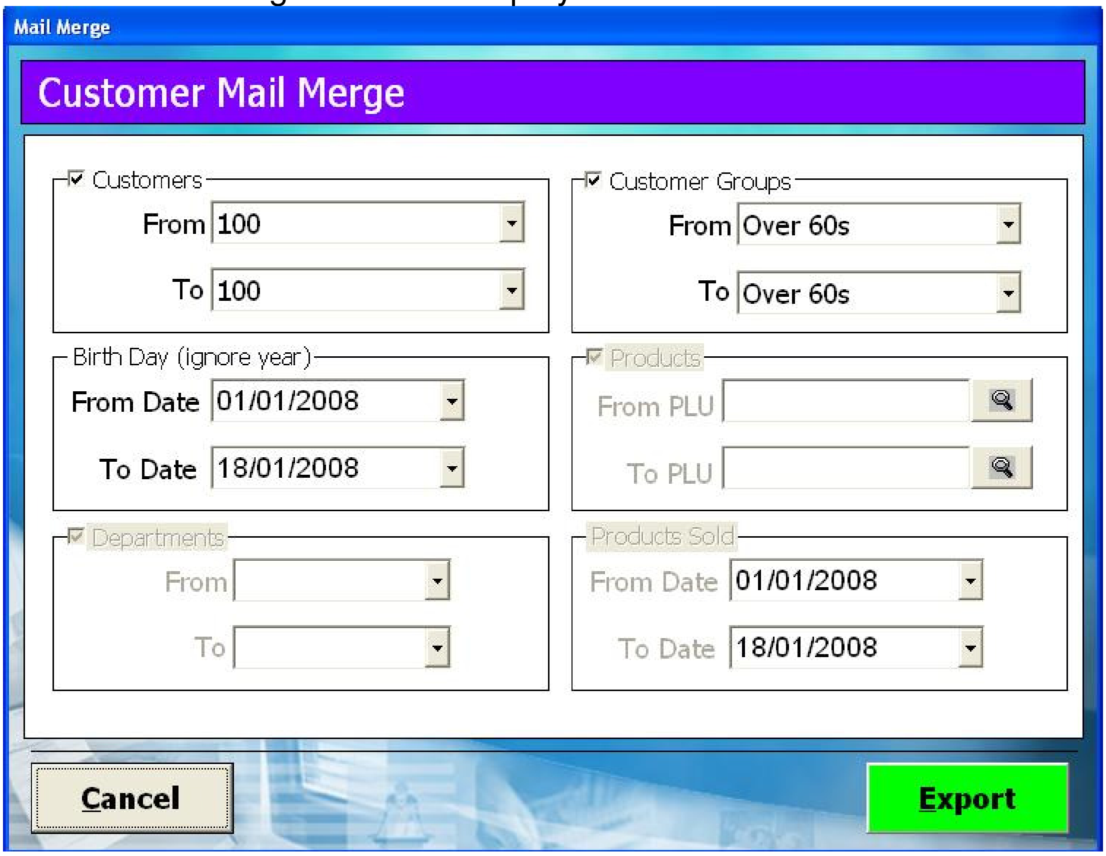
- Tick the selection criteria you want to chose from
- Select Next Step

The mail merge confirmation selection screen is displayed



- Select

The Customer mail merge screen is displayed



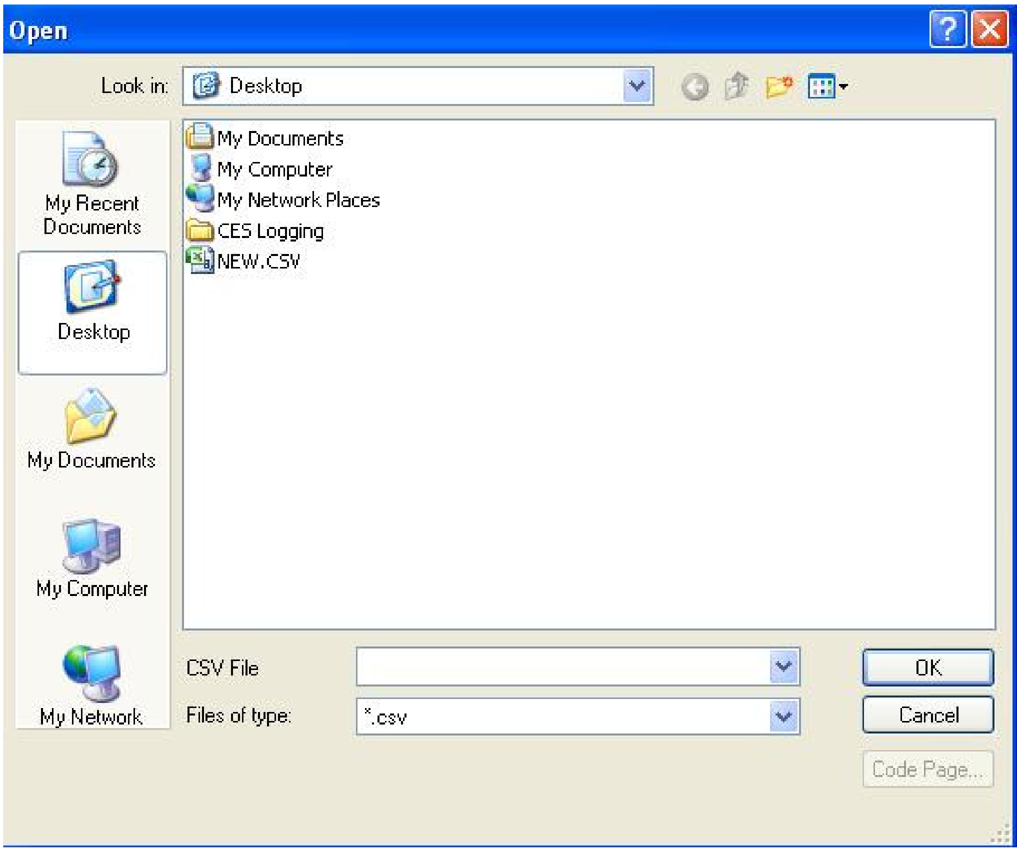
The search criteria you selected will be available
Narrow down your customer criteria if relevant

- Select

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

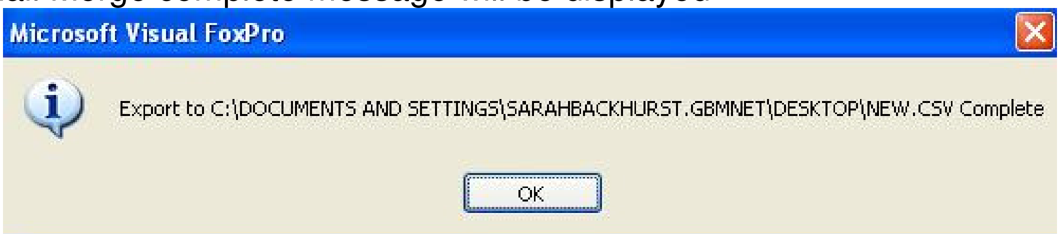
- If you want to proceed with the export press Yes, if not press no

If Yes is selected the following screen is displayed



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

The Mail Merge complete message will be displayed



- Select OK

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

Commission

Sales Mode Commission Selection
Tenders Excluded from Commission

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

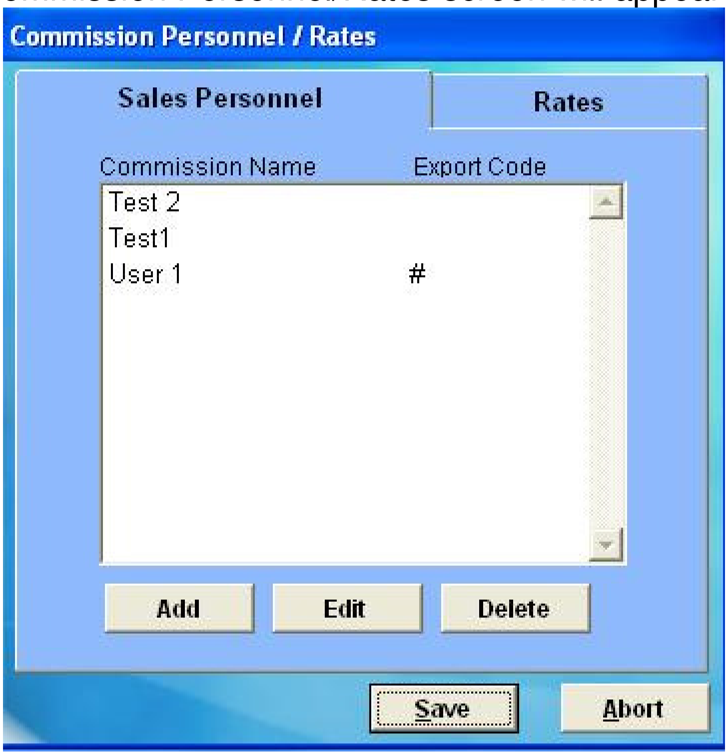
	There are a maximum of 10 bands that can be set

Setting Up Personnel

- Select

- Select

The Commission Personnel/Rates screen will appear



- Select

The Commission Name screen will be displayed

- Enter the name of the user
- Press Enter twice

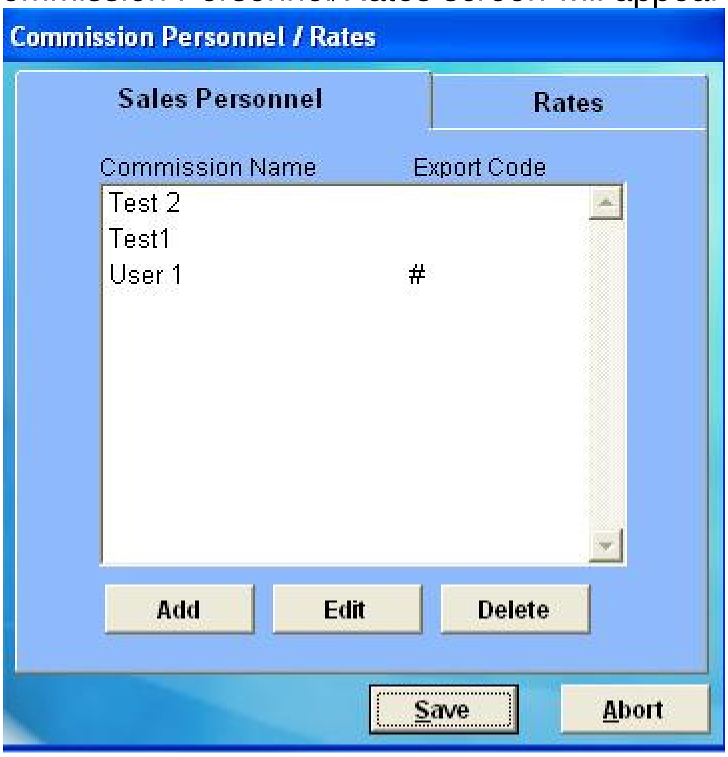
The name of the user will be added to the list

Deleting Personnel

- Select

- Select

The Commission Personnel/Rates screen will appear



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

Editing Personnel

- Select

- Select

The Commission Personnel/Rates screen will appear

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

The Commission Name screen is displayed

- Edit the required information
- Press Enter

Saving Changes

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

- Select

If you do not want to save the changes made

- Select

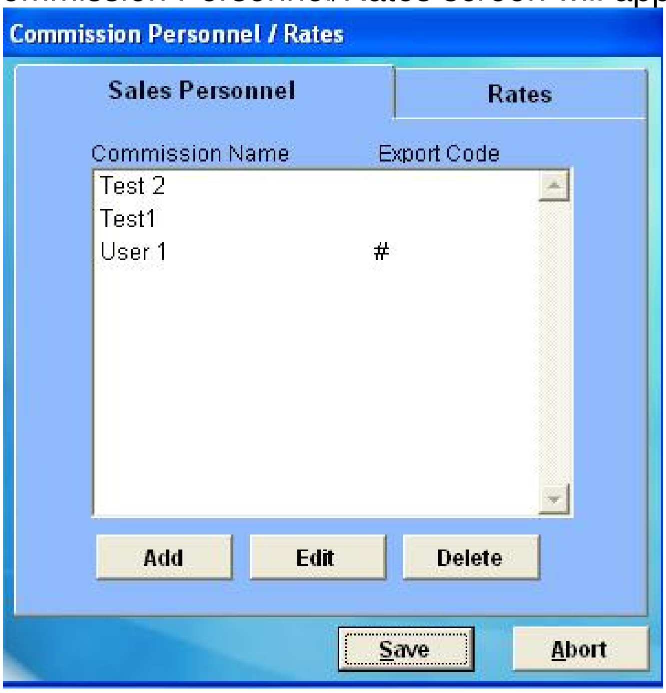
Setting Up Rates

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

- Select

- Select

The Commission Personnel/Rates screen will appear



- Select

The rates page is displayed

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

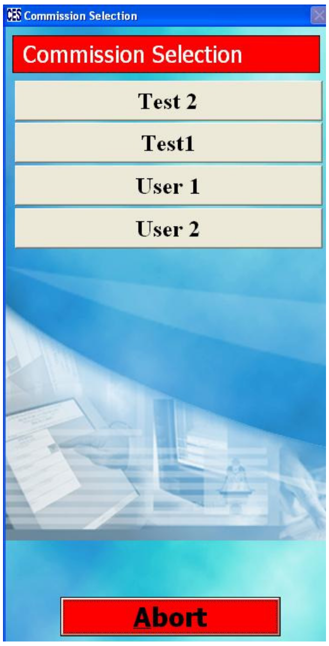
- Enter in the band numbers the amounts and commission rates you want to implement

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

Selling with Commission Set

- Select the products to be sold
- Select

The Commission Selection screen is displayed



- Select the Person the commission is to be attributed to

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

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

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

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

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

For a summary of this Report please see the Reports section

System Menu

Customer Display (Pole Display)

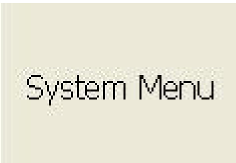
	Customer Display Type **Use Customer Display Script File**

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

Create a message

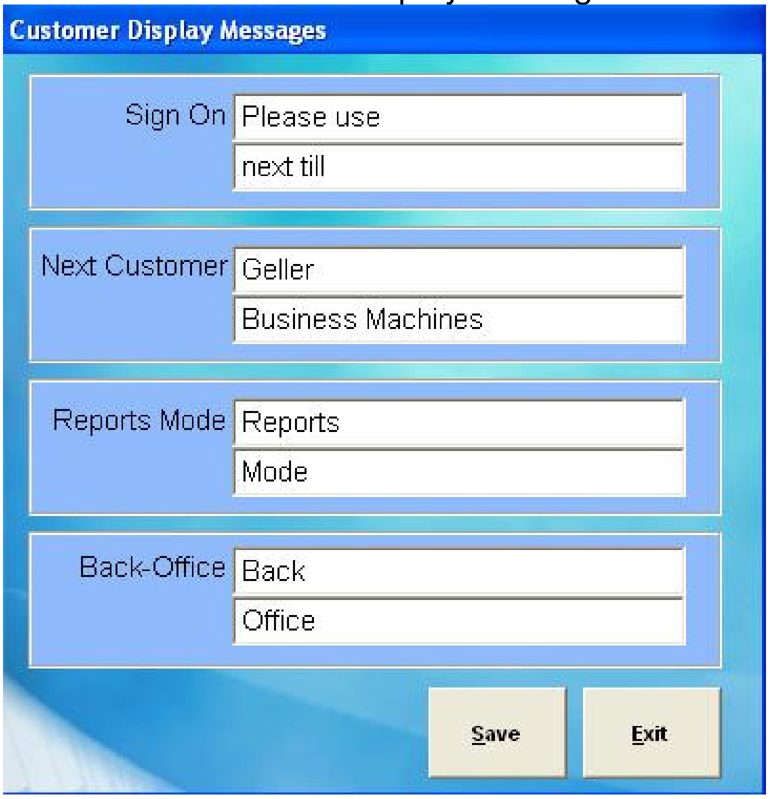
- Select

- Select



- Select

This will show the Customer Display Messages Screen



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

☝	You can have a maximum of 20 characters on each line

Saving Changes

- Select

- If you do not wish to save changes made select

Import/Export

Import/Export Format

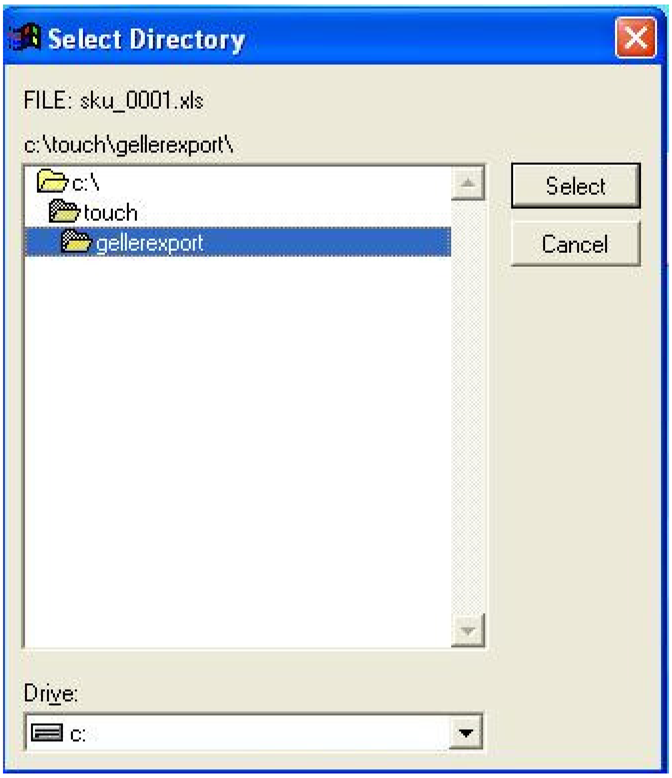
Import/Export allows you to take information from (export) or put information in (import) of the CES software e.g. when you are setting up a new system you could import all the customers product database (from excel) so you do not have to type it by hand or you may want to export the Customer information into excel

- Utilities
- System Menu
- Import/Export

Export

So to export the product file select

- Products



CESexport is the default folder

- Press select

A message will appear saying it is exporting sku file

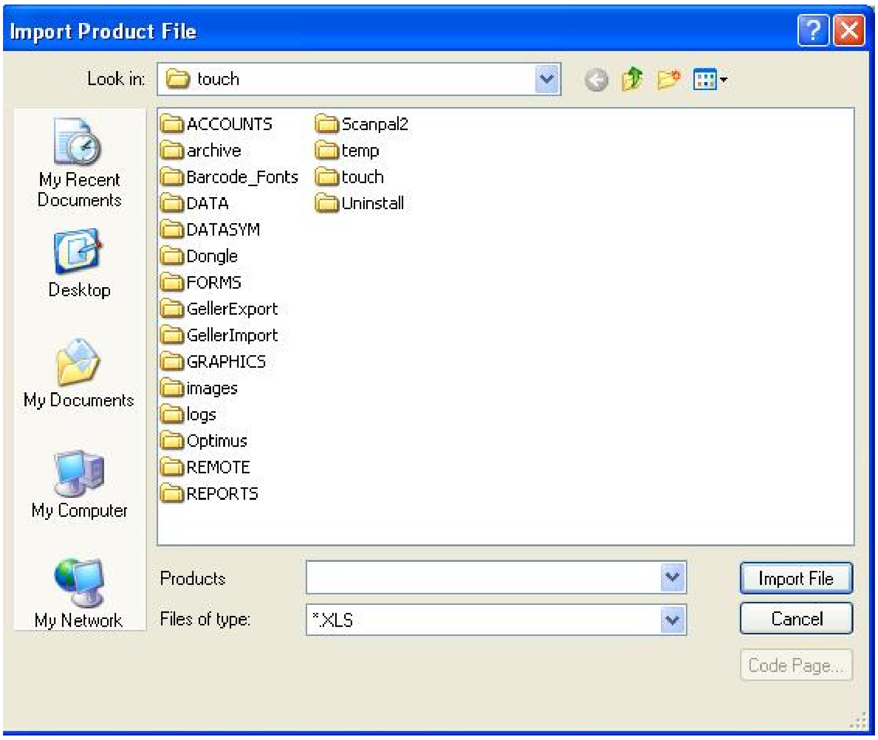
- Go to c:\touch\CESexport

There will be an sku file which is an excel spreadsheet

Import

To import a product file for example select

- Products



- Select the spread sheet you are importing from

☝	When importing information the spread sheet must be in a certain format below is the minimum information required to an import with the correct header name and order – if you want to see the full spread sheet export from a system you have and create your own import spread sheet ensuring the correct format

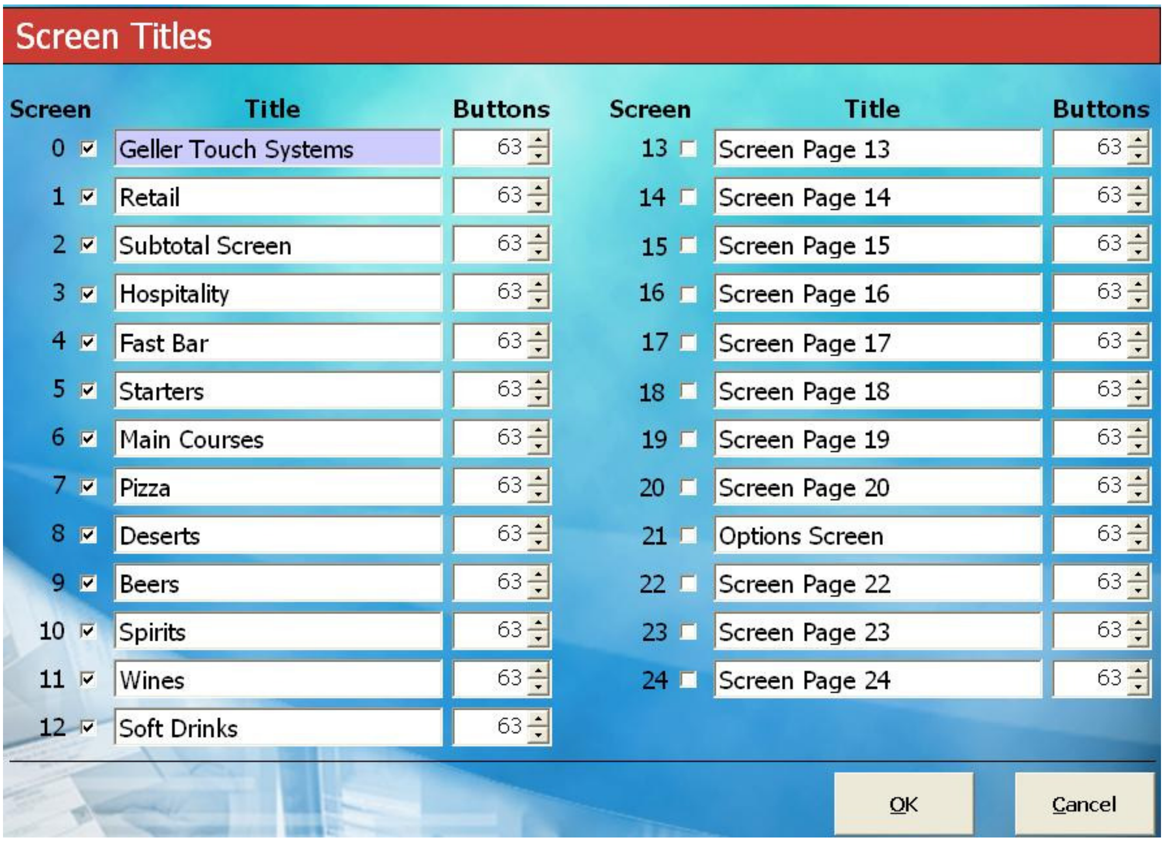
Spread sheet Header	What is this information?
plu	Stock Code/Barcode
desc	Description
dept	Department
supp	Supplier
suppcode	Supplier Code
cost	Cost
vatcode	Vat code
vatrate	Vat rate
qty1	
price1	
qtydes1	
maxdisc	Maximum discount allowed
casecost	Case Cost
cgroupid	Group

☝	Run data checker after an import to correct any errors e.g. any fields that may be blank

Screen Titles

There are a maximum of 24 screens that can be configured for use on the terminals
You can name these screens in

- Utilities
- System Menu
- Screen Titles



☝	Only tick the screens that you want to be loaded when the system starts up – the more you have ticked the longer it will take to load

☝	You can change the number of buttons on the terminal screen by using the up and down arrows or typing a value into the buttons field

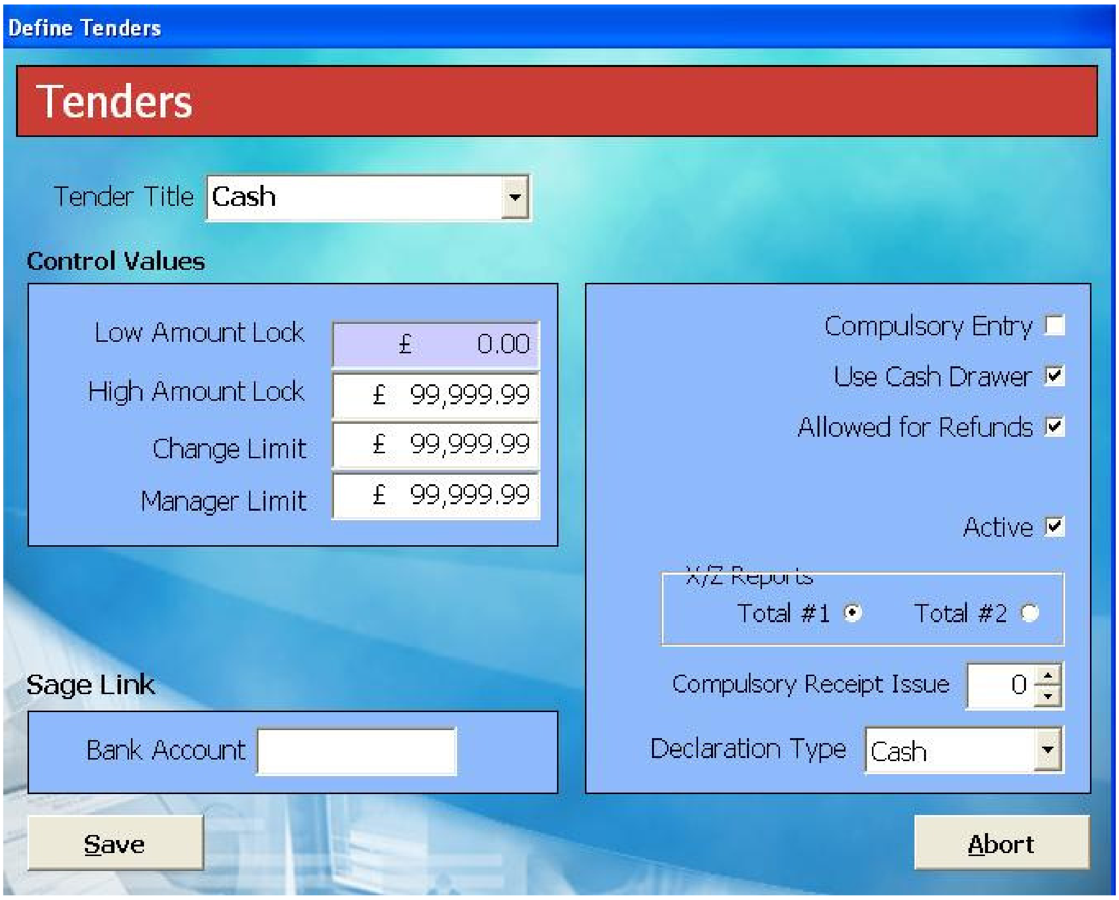
Tenders

	Tender Declaration with EOD

Creating New Tenders

Tenders are the payment types used for payment on the terminal

- Utilities
- System Menu
- Tenders



You can only edit the tender that exist by changing the name

- Select the tender from the drop down box press shift tab to get back to the tender title box
- Enter the name of the tender

☝	Check that it does not exist first by using the drop down selection box as 12 tenders exist in the system by default

Low Amount Lock = the minimum amount that can be taken as payment
High Amount Lock = the maximum amount that can be taken as payment
Change Limit = the maximum amount that can be given as change for this tender type
Compulsory Entry = Enforce amount tendered to be entered
Use Cash Drawer = Do you want the cash drawer to fire?
Allowed for Refunds = Do you allow this tender type for refunds?
Active = Is it a currently active tender?
Compulsory Receipt Issue = If you want to issue compulsory receipts, how many should be issued? The default is 0
Declaration Type = Is it reportable as cash/cheque etc
Sage Link = Posting code for sage

VAT Codes

Print VAT analysis on receipt
Print VAT total on receipt
Touch System EX/INC VAT

Setting Up VAT codes

VAT codes are attached to products in the product files

- Utilities
- System Menu
- VAT Codes

- Enter the description in the first column
- Enter any other translation in the alternative text column
- Enter the % rate in the last column
- Select Save

Charge Sheets

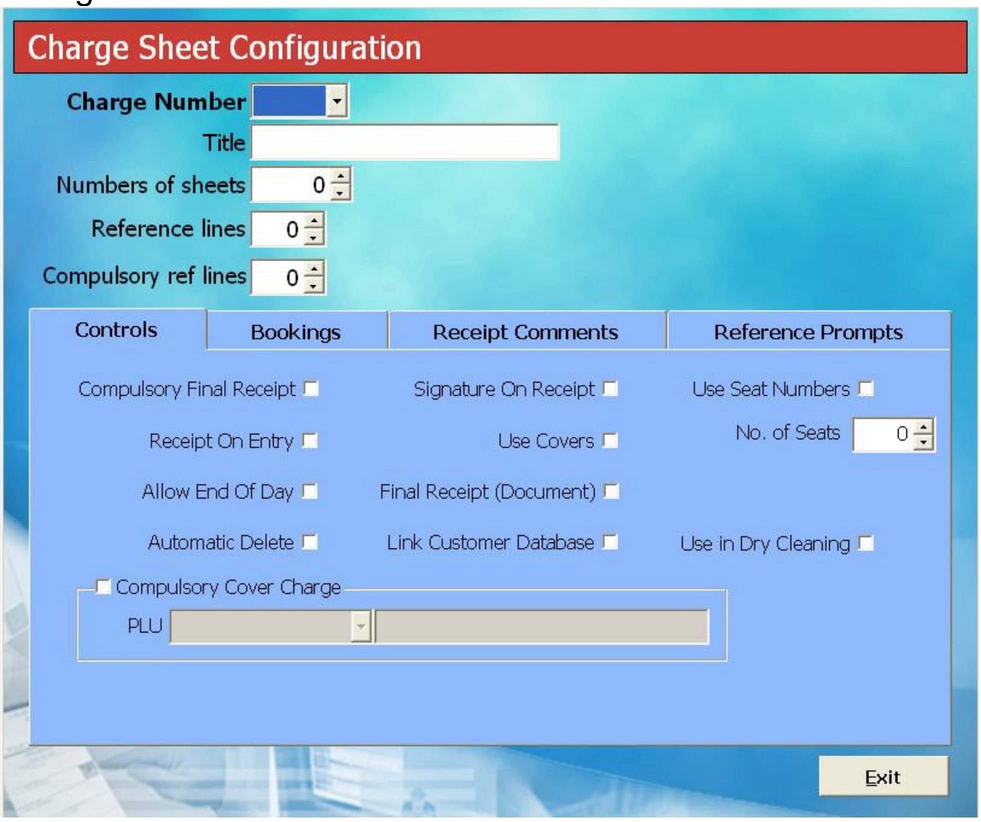
	Compulsory Charge on Sign On **Do not Show Charge Sheet number when Title Exists** **Print Charge Sheet Title on Receipts** **Print Charge Sheet Title on Remotes**

Charge Sheets are a list of tabs/stored transactions and can be used for several different things e.g. tables, rooms, tennis courts – they can be used in conjunction with the bookings module
There are a maximum of 25 sheets that can be configured and each sheet can have a maximum of 9999 tabs.

	We strongly advise against using table planner and the function of charge sheets together (although one has to exist) as the use on the terminal would be extremely confusing for operators

Configuring a new Charge Sheet

- Utilities
- System Menu
- Charge Sheets



- From the drop down box select the charge sheet you want to configure
- Enter the Title of the Charge Sheet *e.g. restaurant, tennis court 1*

- Number of Sheets = the number of bookable things on the charge *e.g. 25 tables in the restaurant or 1 tennis court*

    - Reference Lines = number of lines to display for free text entry when the booking is being made
    - Compulsory ref Lines = the number of lines to be displayed that must be filled in when the booking is being made

	If linked to customer database then there is a customer button next to these fields, selecting a customer will fill in the ref lines with the customer details

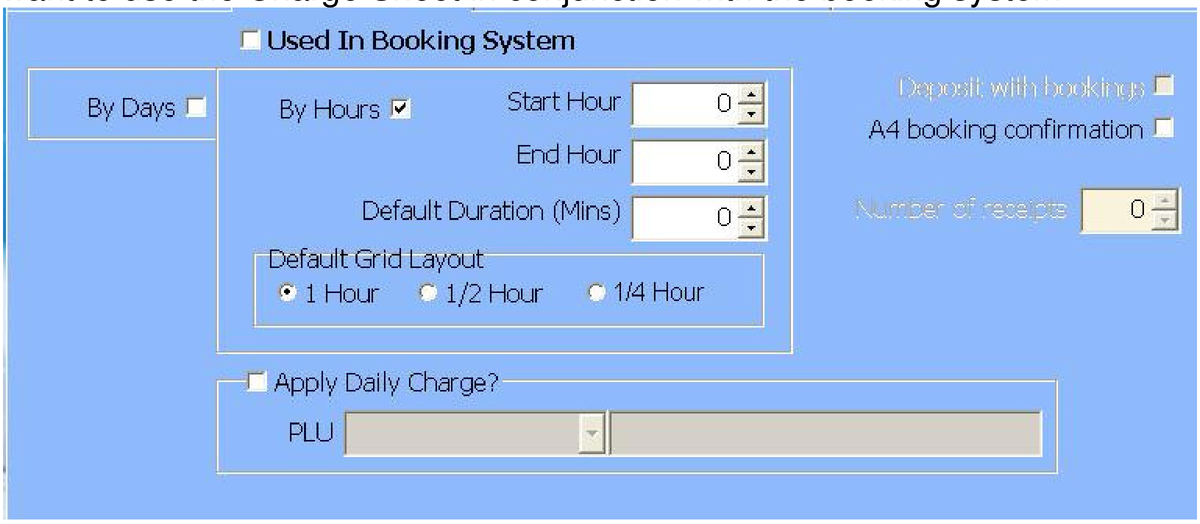
Controls Tab

Compulsory Final Receipt
Receipt on Entry
Allow End of Day = Can perform end of day if there is an outstanding balance
Automatic Delete = deletes the data of the transaction when cashed off
Signature On Receipt = prints a signature box on receipt
Use Covers = prompts for covers
Final Receipt (Document)
Link Customer Database = shows customer button next to ref lines
Use Seat Numbers
Number of Seats
Use in Dry Cleaning = dry cleaning function only
Compulsory Cover Charge = when covers are entered this PLU is sold
PLU = PLU for compulsory cover charge

Bookings Tab

Delete Extracted Bookings
Ask for Customer at Start of New Booking
Compulsory Customer Required for Bookings
Show days on Booking Planner
Use Covers to Populate Bookings

If you want to use the Charge Sheet in conjunction with the booking system

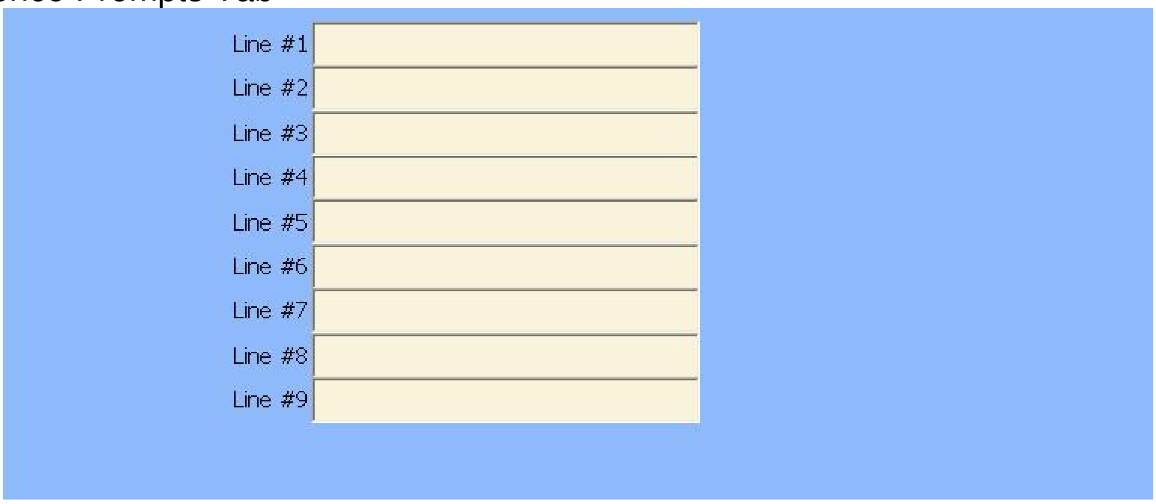


Used in Booking System = enables
By Days = Grid view
By Hours = Grid view
Start Hour = Normal booking hours
End Hour = Normal booking hours
Default duration (Mins)
Default Grid Layout = Grid Layout
Apply Daily Charge
Deposit with booking
A4 booking confirmation
Number of Receipts

Receipt Comments Tab

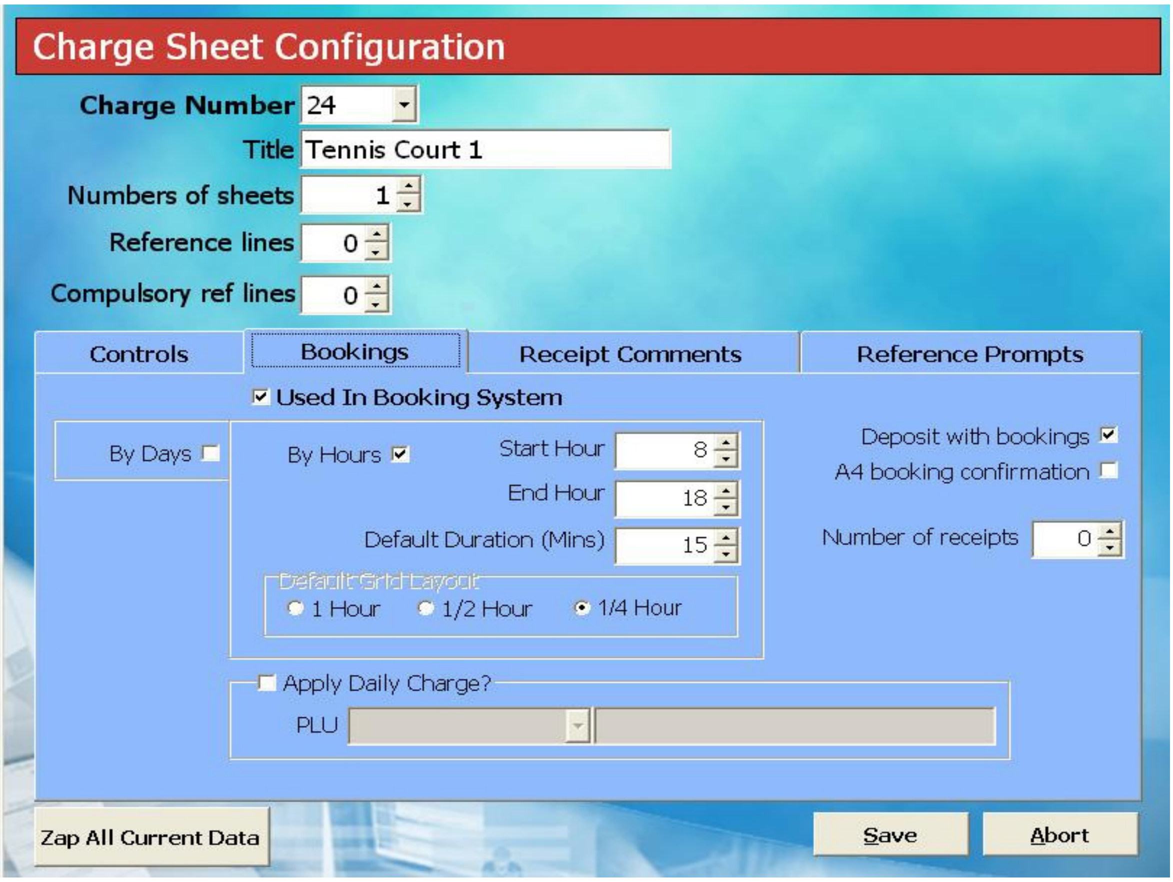
- Enter here any comments you want to be printed on the receipt

Reference Prompts Tab



- Enter here any questions or instructions you want the user to carry out at the time of the booking *e.g. Name, age, telephone number*

Example of a tennis court that can be booked between 8am and 6pm in 15min slots and must have a deposit taken a point of booking



Zap All Current Data
The zap all current data option will delete any transactions within the charge table

Archive Sales

	Automatic Archiving **Check for sales archiving on start up**

Archive Sales

- Utilities
- System Menu
- Archive Sales

- Select Proceed

	If you do not want to archive the Sales Data select Exit

Once the Archive is complete the following message will appear

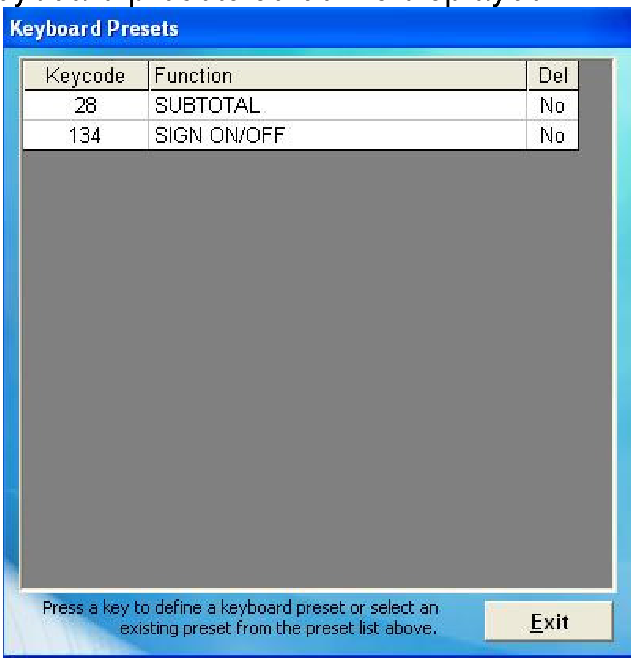
KB Presets

Keyboard Presets are predefined keyboard buttons that carry out an action (similar to hotcodes)

Creating a new KB Preset

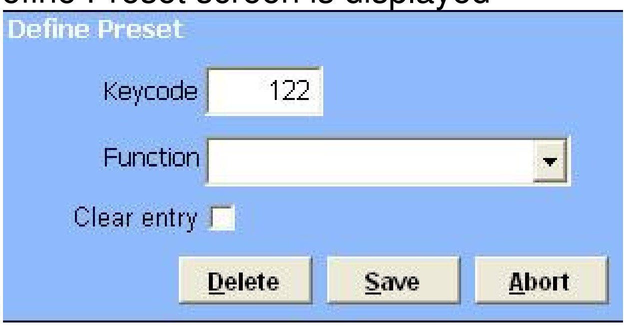
- Utilities
- System Menu
- KB Presets

The keyboard presets screen is displayed



- Press the key on the keyboard that you want to create the shortcut for *e.g. z*

The Define Preset screen is displayed



The keycode number will be populated automatically

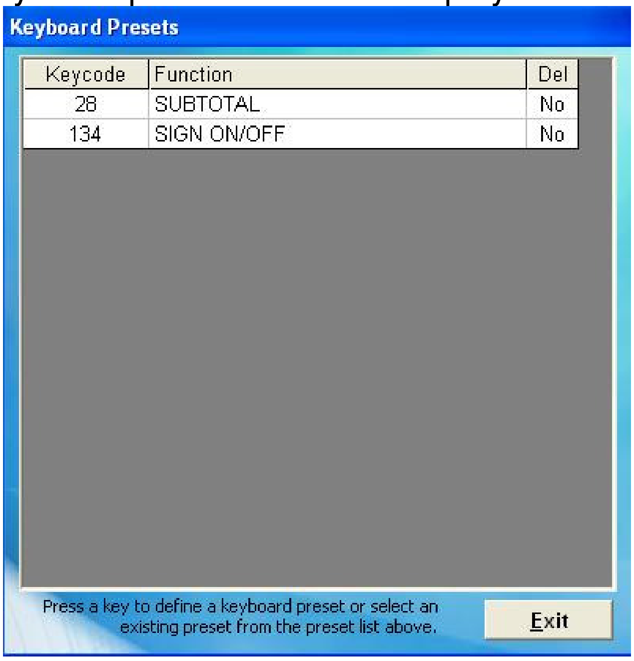
- From the drop down box select the action you want this shortcut to perform *e.g. Paid Out*

- Clear Entry removes the command text from the sales screen
- Select Save to save the preset

Deleting a new KB Preset

- Utilities
- System Menu
- KB Presets

The keyboard presets screen is displayed



- Select the Preset to be deleted

The define preset screen is displayed

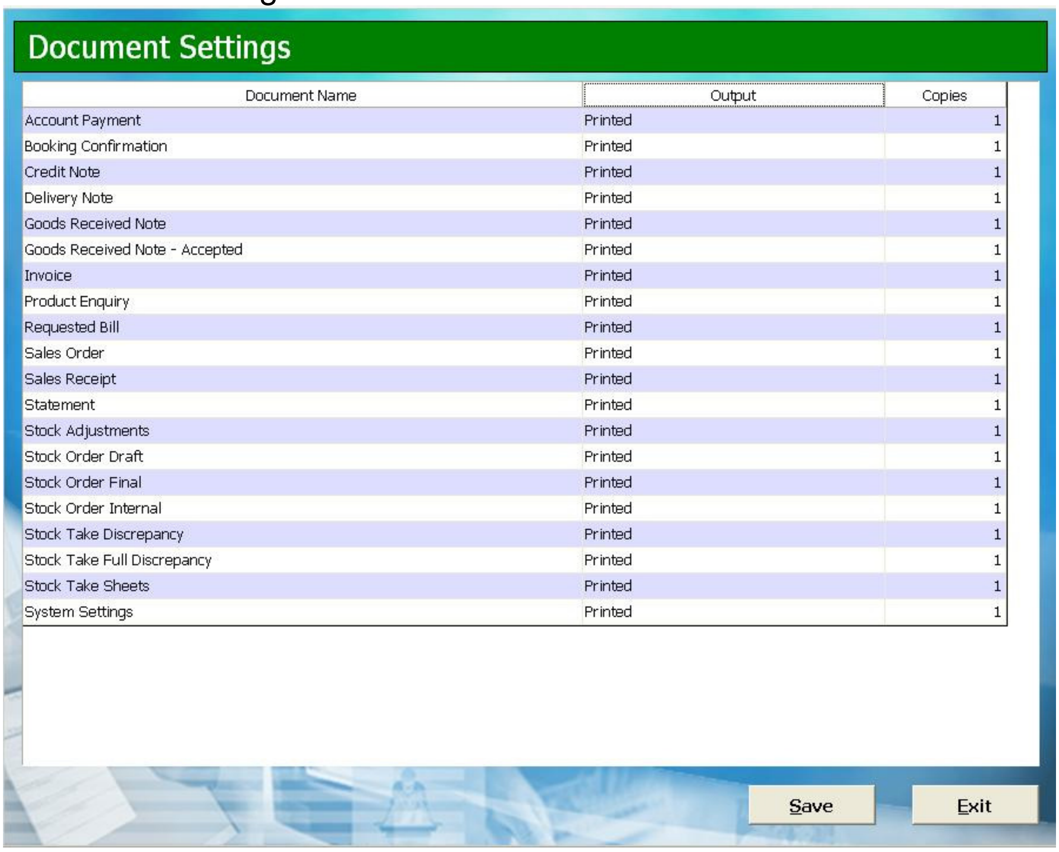
- Select Delete

☝	Be careful! There is no confirmation for deletion

Document Settings

Document Settings allows you to predefine the printer and number of copies that will be printed for certain documents

- Utilities
- System Menu
- Document Settings



Document Name	Output	Copies
Account Payment	Printed	1
Booking Confirmation	Printed	1
Credit Note	Printed	1
Delivery Note	Printed	1
Goods Received Note	Printed	1
Goods Received Note - Accepted	Printed	1
Invoice	Printed	1
Product Enquiry	Printed	1
Requested Bill	Printed	1
Sales Order	Printed	1
Sales Receipt	Printed	1
Statement	Printed	1
Stock Adjustments	Printed	1
Stock Order Draft	Printed	1
Stock Order Final	Printed	1
Stock Order Internal	Printed	1
Stock Take Discrepancy	Printed	1
Stock Take Full Discrepancy	Printed	1
Stock Take Sheets	Printed	1
System Settings	Printed	1

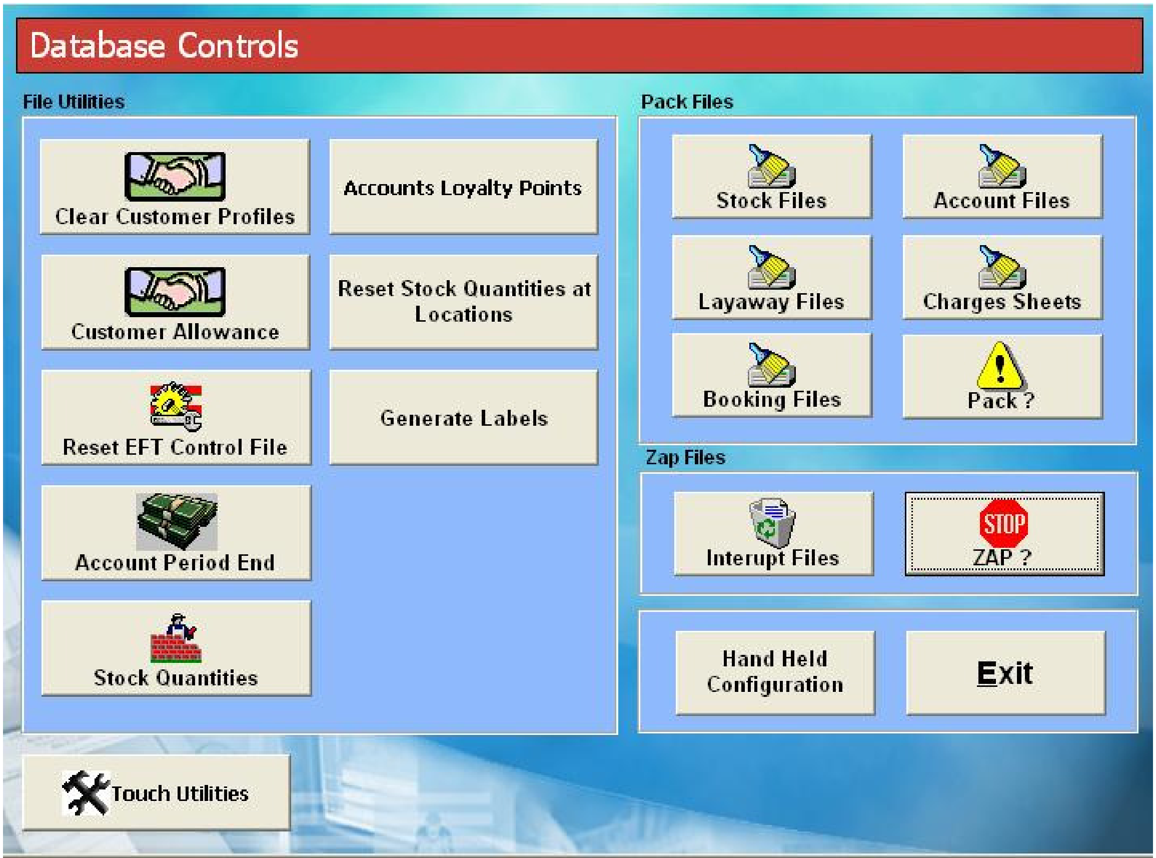
E.G. If you want to print 2 copies of Stock Take Sheets to the default printer every time the option is selected

- Click in the Output column for Stock Take Sheets
- From the drop down box select the default printer

- In the copies column select type 2
- Select Save to save the changes

Database

Database controls are utilities that enable you to clear down parts of the database – these should be used with caution and a backup of the database should be taken before you carry out any of these actions



File Utilities

Clear customer Profiles
Clears down historical transaction data – does not clear down names and address information

Customer Allowance
Resets the Customer Allowance Points to 0

Reset EFT Control File
Resets the Credit Card system if it cannot be used after a crashing instance

Account Period End
Marks the date as the Accounting Period End in the system

Stock Quantities
This is the ‘old’ way of managing the stock database and should not be used

Accounts Loyalty Points
This option clears down all loyalty point information in Accounts only

Reset Stock Quantities at Location
Resets the Stock quantities at locations to 0

Generate Labels
Generates barcode labels

Pack Files

To pack a file means that all deleted information through the UI will get permanently removed from the database and the files ‘tidied up’. We recommend that this is not used and the ‘Touch Clear Down Utility is used instead.

Stock Files

Layaway Files

Booking Files

Account Files

Charge Sheets

Pack? – allows you to chose the file you want to pack

Zap Files

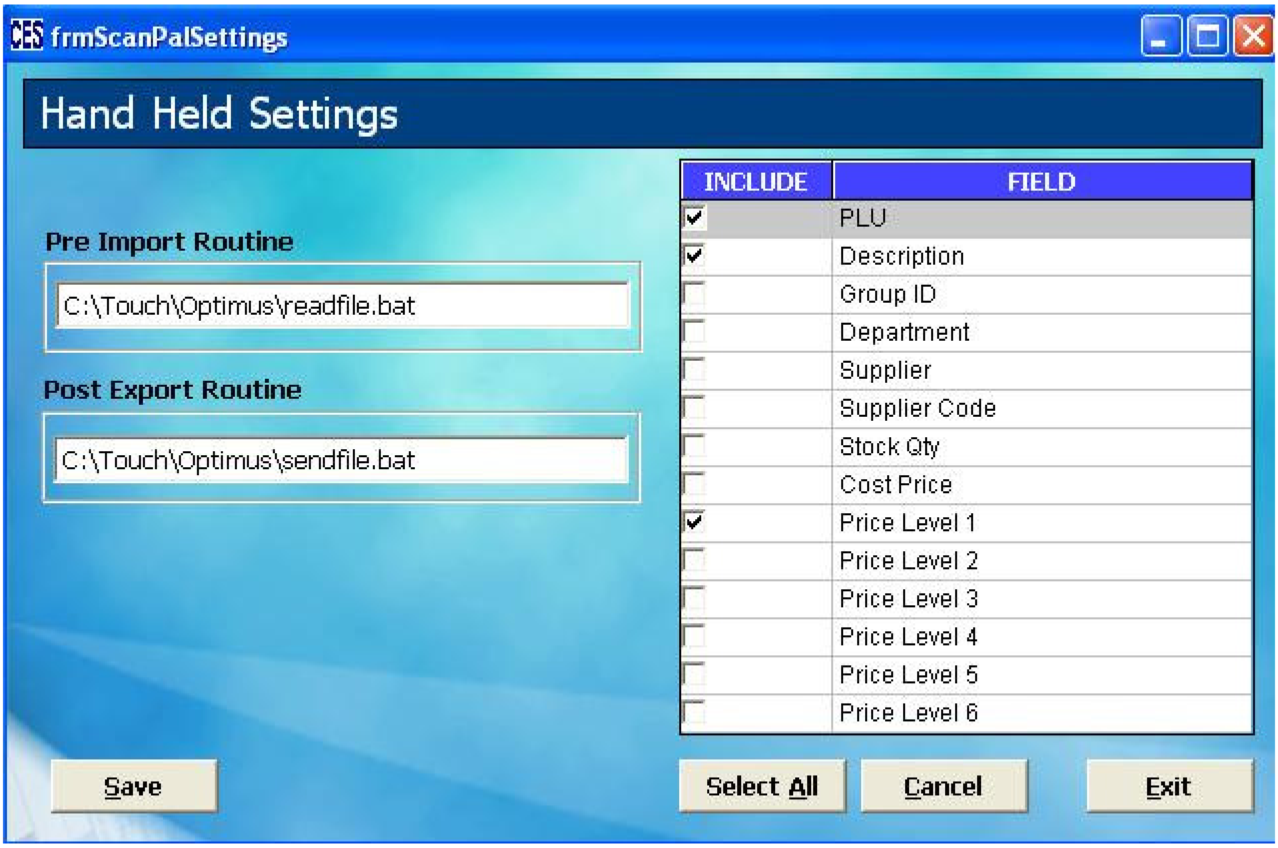
To Zap a file is to permanently delete all information held in that record so if you zap the stock file you will lose ALL of your stock information

Interupt Files
If the till crashed in the middle of a sale and you go back to sales mode the operator may be greyed out – Interupt Files will release the operator so they can sign back on again

Zap?
We recommend that this is not used and the ‘Touch Clear Down Utility is used instead.

Handheld Configuration

The handheld option allows you to configure the scanpal settings.



Touch Utilities

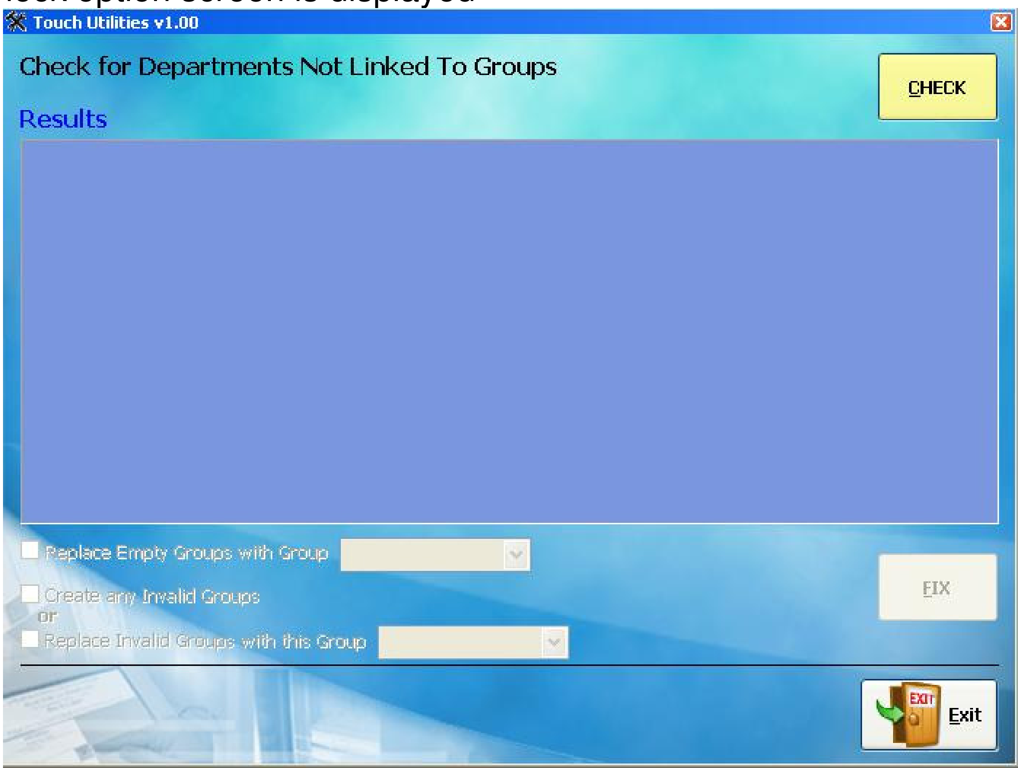
Touch utilities allows you to run a data checker; there are four different checks that can be done; it is recommended that you run all four

- Select

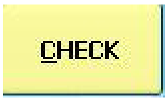
The touch utilities screen will be displayed

- Select the option you want to check (advisable to run all four options)
- Select

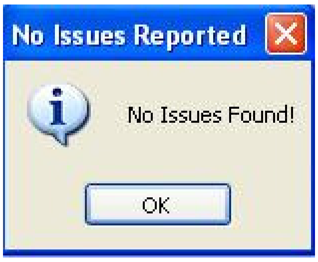
The check option screen is displayed



- Select



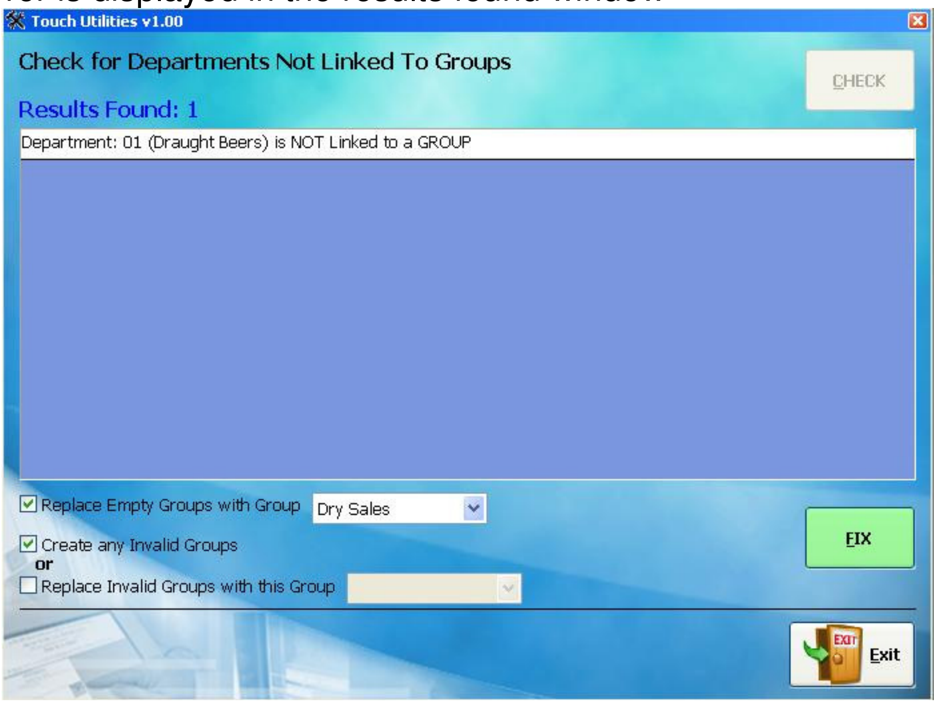
If no issues are found the following message will be displayed



If issues are found you will get the following message

- Select OK

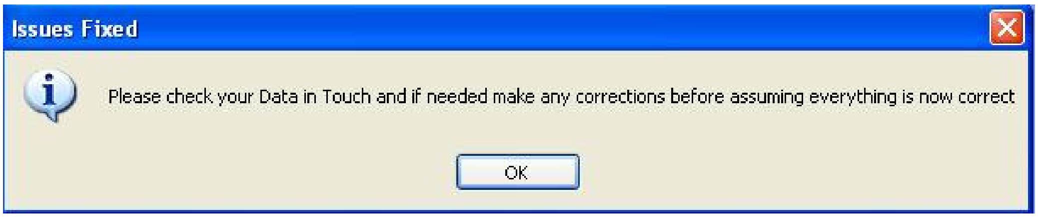
The error is displayed in the results found window



Use the selection box to indicate the action to be taken

- Select

A confirmation box is displayed advising that you check touch to confirm the fixes have been done



You will be returned to the Touch Utilities screen where you can select the next utility to run

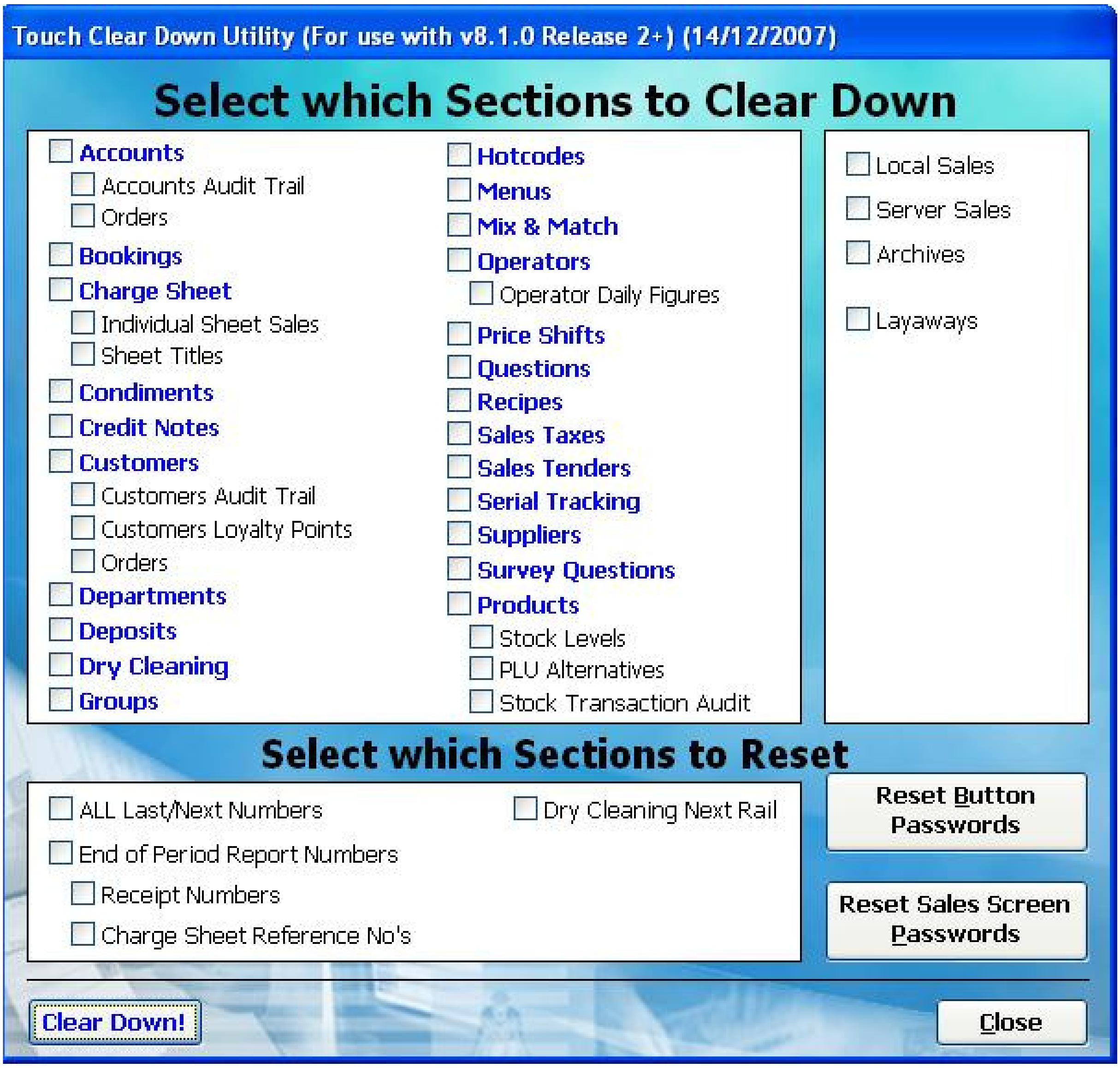
Touch Clear Down Utility

The Touch Cleardown Utility is in c:\touch and is a utility that allows you to clear down data from various parts of the database; this should be used over and above the options in 'database', or reset password buttons on the sales screen or back office

☝	We strongly recommend you take a back up of the touch folder before you run any clear down

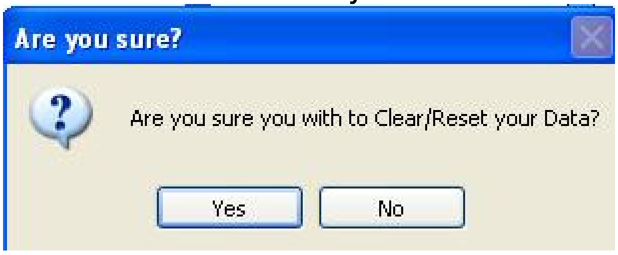
- Double click on the 'touchcleardownutility'

The following screen is displayed



- Select the options you want to clear down or the passwords you want to reset

You will be asked to confirm you want to Clear/Reset your data



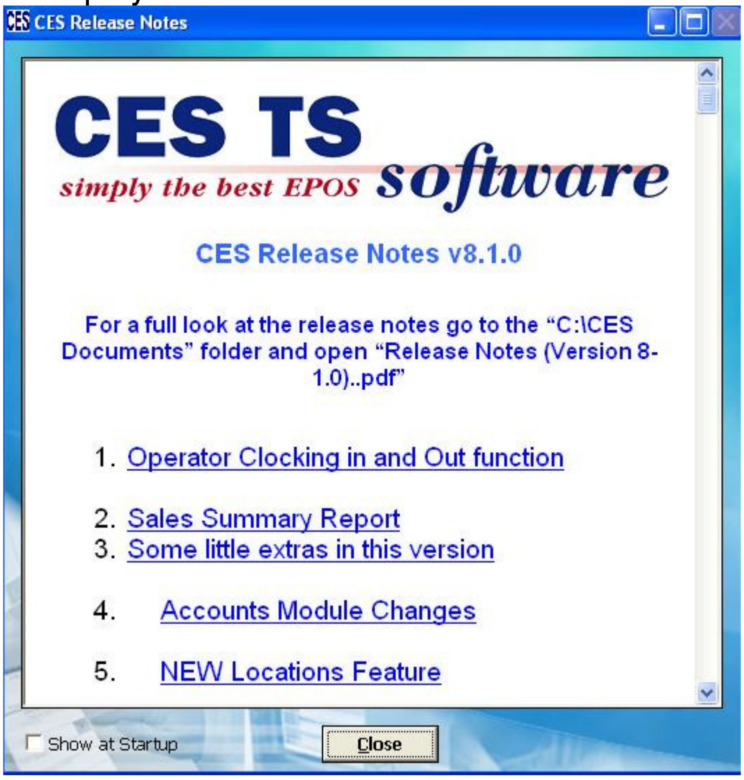
- Select Yes

You will get a confirmation to confirm that the Cleardown has been completed

Release Notes

- Utilities
- System Menu
- Release Notes

This will display the release notes window



From here you can use the scroll bar to read about any changes in the version you are running

☝	If you want to show this when the software is loaded tick the Show at Startup box

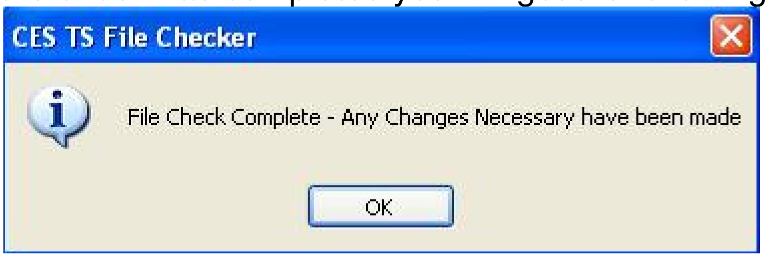
File Checker

File Checker is a utility that when run, checks for errors in the database

- Select

In the top right hand corner of the screen you can see the files that are being checked

Once the check has completed you will get the following message



- Select OK

You will be asked if you want to run the Touch Utilities to check your data

- Answer Yes or No as applicable

Selecting No will take you back to the main screen

Selecting Yes will open the Touch Utilities disclaimer screen – accept the agreement

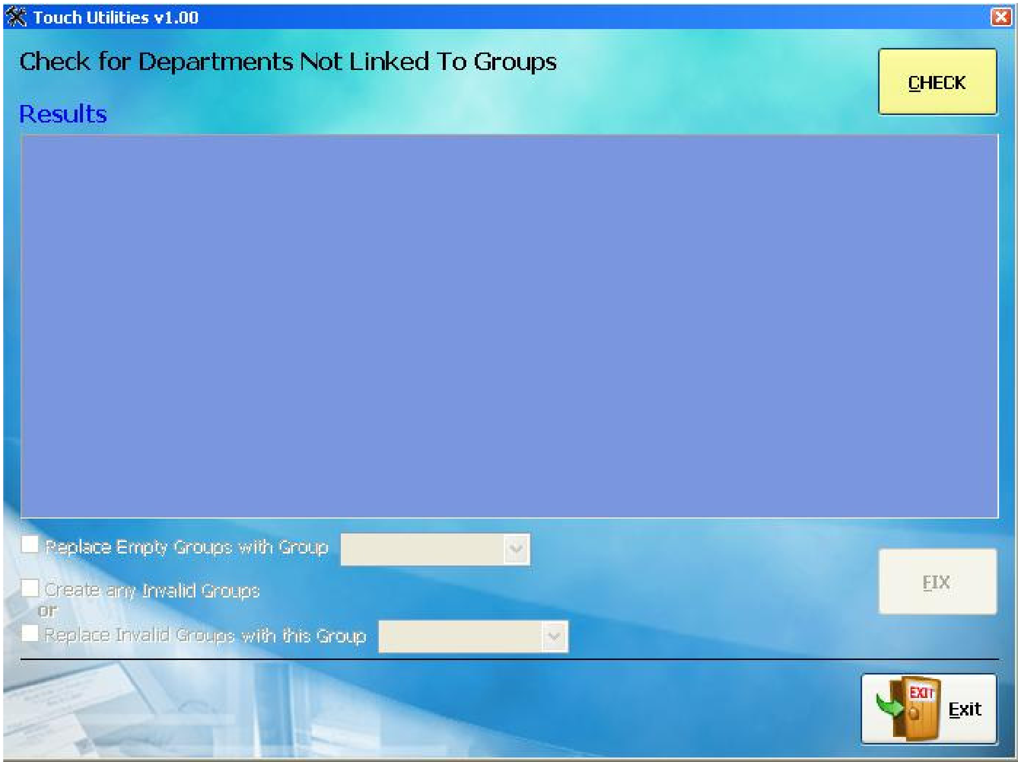
☝	Make sure you have taken a back up of the database

- And select continue

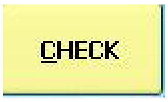
The touch utilities screen will be displayed

- Select the option you want to check (advisable to run all four options)
- Select

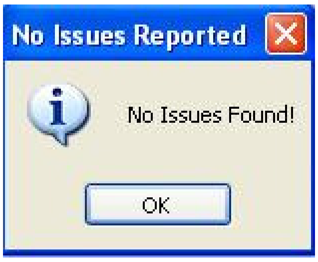
The check option screen is displayed



- Select



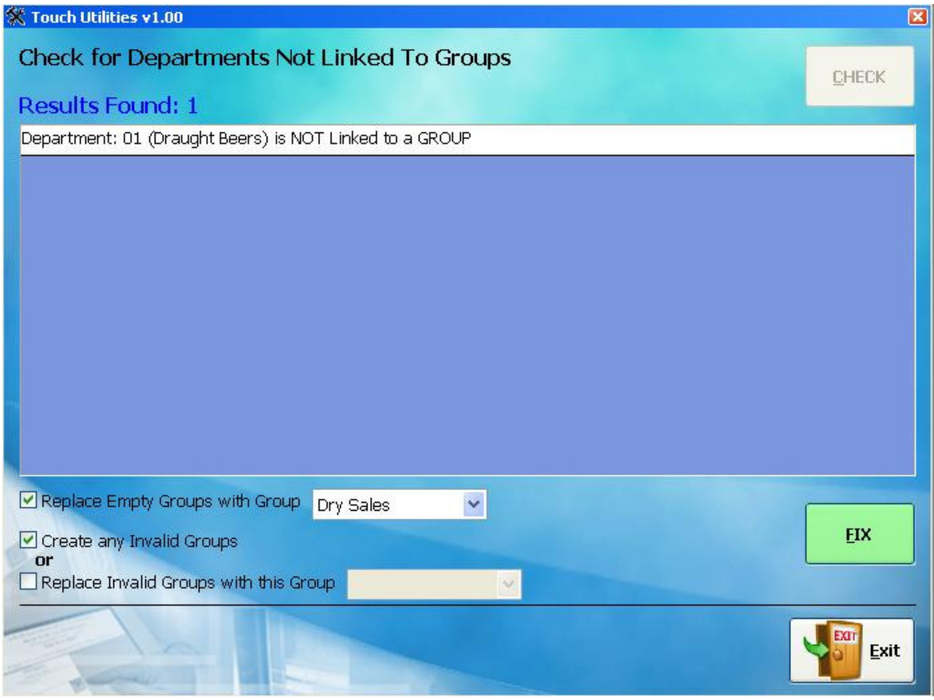
If no issues are found the following message will be displayed



If issues are found you will get the following message

- Select OK

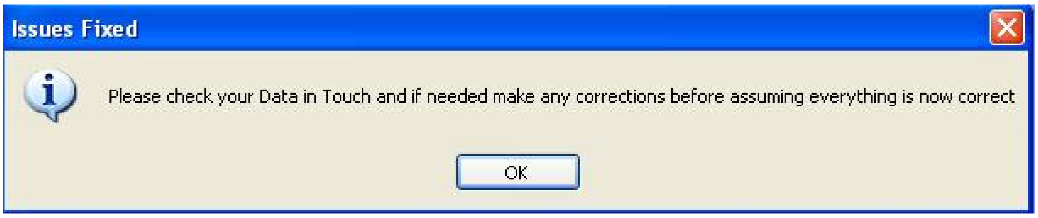
The error is displayed in the results found window



Use the selection box to indicate the action to be taken

- Select

A confirmation box is displayed advising that you check touch to confirm the fixes have been done



You will be returned to the Touch Utilities screen where you can select the next utility to run

Settings

Please refer to the separate Settings document for a comprehensive list of settings and a description

Screen Set Up

Pre-defined Button Actions

All commands will default to UPPERCASE

	Command	Action	Example
Product Sales	Nnnn*	Puts a product on the screen where n = the PLU	Fosters* 01001*
	Nnnn*L3	Sells the product at price level 3	Fosters*L3 01001*L3
	Product Code	Enter the PLU then press this button to sell that product	On the transaction screen type in Fosters 01001 Press ‘Product Code’
	Nnn*PLU/S	Where nnn = the PLU displays the actual stock quantity on the sale button and updates in real time V8 ONLY	Fosters*PLU/S 01001*PLU/S
	N*Price	PLU as open price where n = the PLU number that has been set up in the product module	Fosters*Price 01001*Price
	Nnn*Price/N	Where n = plu sets the product to be a negative price	Fosters*Price/N 01001*Price/N Must have ‘Compulsory price on zero priced items’ set to NO
	Quantity (X)	Enter the total number of item being sold	
	Quantity Last	Allows you to change the quantity on the last item	

	All Quantity (X)	Allows you to change the quantity on all items in the current sale	
	Price Change	Function to alter the price of a pre fixed priced product	
	Consolidate	Add quantities of identical items in the current transaction	
Product Information / Searching	Product Search	Search for a product by PLU/SKU, description, catalogue number	
	Product Search Stock	Allows a product search on only items with a positive stock holding	
	Product Enquiry	Select product and bring up information about the product – the details displayed are defined in utilities>enquiry display	
	Last Product Enquiry	Runs a product enquiry on the last product sold	
	Product Picture	If a picture is associated and tagged to a product, display the picture of the product	
	Product Maint	Takes you to the product maintenance screen	

	StockEnquiry-Location	This allows you to search for stock and view the results by location	
	Layaway	Puts the current transaction on hold until a later time	
Departments	n*Depart	Where n = Department name	Draught*Depart Books*Depart
	n*Depart/A	Where n = Department name puts department contents in alpha order	Draught*Depart/A Books*Depart/A
	n*Depart/P	Where n = Department name keeps the department open until the exit button is selected	Draught*Depart/P Books*Depart/P
	n*Depart/S	Where n = Department name, shows the number in stock	Draught*Depart/S Books*Depart/S
	n*Depart/A/P	Where n = Department name puts department contents in alpha order and displays until you select exit	Draught*Depart/A/P Books*Depart/A/P
	N,n,n*Depart	Where n = department shows multiple departments on the same button	Books,Draught*Depart
	N,n,n*Depart/A	Where n = department shows multiple departments on the same button in alpha order	Books,Draught*Depart/A

	N,n,n*Depart/P	Where n = department shows multiple departments on the same button and you have to select exit to quit the screen	Books,Draught*Depart/P
	N,n,n*Depart/A/P	Where n = department shows multiple departments on the same button in alpha order and you have to select exit to quit the screen	Books,Draught*Depart/A/P
Menus	N*Menu	Where n = menu code displays the menu in sales mode	01*Menu
	N*Menu/P	Where n = menu code displays the menu in sales mode and keeps the menu on the screen until the exit button is selected	01*Menu/P
Refunds	Refund	Refund either an item or an amount	
	All Refund	Refund all the items in the current transaction	
	Transaction Refund	Refunds an entire transaction – requires the original receipt number	
	Open Refund	Takes an amount off of a total	
Voids	Void	Void a particular item in the current transaction	

	Void Last	Voids the last item on the current transaction	
	Void All	Voids all items in the current transaction	
	Error Correct	Like a Void you are able to correct an item anywhere in the sale	
Bill Management	Split Bill	Split the bill by selecting the particular items in the sale	
	Go Dutch	Splits the bill by number of covers and not items sold	
Table Management	N*Open Table	Where n is the charge sheet number – this accesses the table planner module	
	Away	Sends the word AWAY to the remote printer of choice	
	Post Charges/TP	When using table planner this button saves the sale away	
	Transfer Bill/TP	Uses table planner data and will only show tables that have been set up within table planner	
	Covers	Change cover numbers on a subtotal sale screen	

Charge Sheet Management	1*Charge – 25*Charge	Opens the number of the corresponding charge sheet you want	
	1*Charge Free – 25*Charge	Activates the charge sheets selection page displaying free tables only	
	N/1 Charge	Takes operators directly into a specific charge number within a specific charge sheet	
	*Charge-Free	Shows open free charge sheets	
	Post Charges	Saves the transaction away	
	Transfer Bill	Transfer the details on screen to another charge sheet allocation or within the same charge sheet	
	Seat	Used in conjunction with charge sheets – tells you how many have been used and how many are free	
	Charge Sheet Report	Allows you to select and print the unpaid charge sheets from sales mode	
Bookings	Booking Planner	Enter the booking planner in which you can extract bookings into sales mode	

	Customer + Booking	Allows you direct access to the booking screen where you can link a booking to the customer database	
Discount	Discount	Enter discount mode	
	Percentage	Discount the last item by a percentage – used in conjunction with discount mode	
	Amount	Sell the last item for a discounted price of your choice – used in conjunction with discount mode	
	Off	Take a particular amount off of the last item in the sale	
	Alldiscount100*P	Attributes 100% discount to the sale.	
	Alldiscount100*A	Attributes 100 amount to the sale.	
	Alldiscount100*O	Attributes 100 amount off of the sale.	
	Apportion Discount		
	Select Discount	To select items in a sale that are applicable to the discount you are going to give	
	Alldiscount	Able to select all items to be discounted before entering your percentage or amount	

	*PlusPercentage	Increases the transaction by %age e.g. service charge	
Paid In/Out	Paid In	Pay money into the till e.g. float	
	Paid Out	Pay money out of the till e.g. to pay the window cleaner	
Stock	Goods Inward	Brings up the good inwards screen (back office) within sales mode to allow stock to be allocated into the stock file without needing to go into back office	
	Branch Enquiry	Allows you to look at other branch stock levels	
	Serial Tracking	Brings up the serial tracking facility within sales mode	
VAT	VAT Change	For items selected change the standard VAT rate to a defined VAT rate change	
	Select VAT Change	For item selected change to different VAT rate via system set VAT rate table	
Receipts	A4 Request	Print bill on A4	
	Receipt	Print a copy of the last receipt given or a bill for the current transaction	

	Validate Last Sale	Print time, date, total receipt no., operator on slip printer	
	Review	Review all current transactions made on either that machine or throughout the network	
	Gift	To print a gift receipt that has all items but no costs	
	Export	Prints the words 'Export Sale' in large font below the header. A4 receipt will not work	
Deposits	Deposits	Enables a deposit to be taken	
Accounts	Account Sale	Put the current transaction to an existing account, this should be done at the beginning of a sale so any price level offsets can be applied	
	Account Payment	Make a payment to an account	
	Account Status	Provides account status via account number	
	AccountsBalance	Displays the balance of an account in Sales Mode	

	AccountsLoyalty	Allows loyalty points to be displayed with the option to print when using loyalty points associated to accounts module	
Customer	Customer	Call up customer details	
	Account Orders	Allows direct access to account/customer orders from sales screen	
Price Levels	Price Offset 0-5	Price Level 1 - 5 where 0 =1 and 5 = 6	
	Price Offset Default	Sets the price level back to the default set in your system options	
	Nnnn*L3	Sells the product at price level 3	Fosters*L3 01001*L3
Modifiers	N*Mod	Where N is the unit of sale e.g. Half	Half*Mod Double*Mod
Clock In/Out	Clock-In	Operator sign on to be able to run staff hours reports	
	Clock-Out	Operator sign off to record on staff hours reports	
Kitchen Printers	Restartp	A keycode that allows printers to be restarted in sales mode after they have been disabled	
	*RMINS	Allows operators to send instructions to the remote printers	

	Freetext	Enter free text to put on a receipt or to be sent to the kitchen printer	
	Away	Sends the word AWAY to the remote printer of choice	
	Course	Using remote sales viewer you can assign all items as one course for the kitchen to prepare	
Reports	Hourly Report	Able to view on screen and the print if needed	
	Commission Report	View and print if needed	
	Reports	Enter reports mode	
	End of Day	Print an End of Day report while in Sales Mode	
	Current Sales	Print a current sales report while in sales mode	
Screen	Default Screen	Takes the sales screen back to the screen you have set as your default in system settings	
	Screen Page n	Where n = the screen page number you want to navigate to	
	Screen Names	These names are the different screens that you can configure for the sales mode	
	0 - 9	Numeric buttons 0 - 9	

	EndOfShift	Allows multiple end of shifts per operator and the consolidates the declared figures on the End of Day report	
	Sub-Total	Performs a sub-total on the current transaction	
	Sign On/Off	Return to the sign on screen	
	*Operator	N*operator, direct operator sign on button	
	Clear	Clear figures or text in the text/function entry box	
EFT	C&PLayaway	Chip and Pin Layaway for use of a Thyron unit	
	EFT Recall	Recall any suspended EFT transactions	
Dry Cleaning	DryCleaning-PickUp	Used as part of a dry cleaning system	
Etop Up	Etopup	Used with the etop up and itunes module	
	Evoucher	Used with the etop up and itunes module	
Misc	Sales Commission	Allows the association of current sale to an operators commission figures	
	SendMessage	Allows for the new messaging feature to be used V8 ONLY	

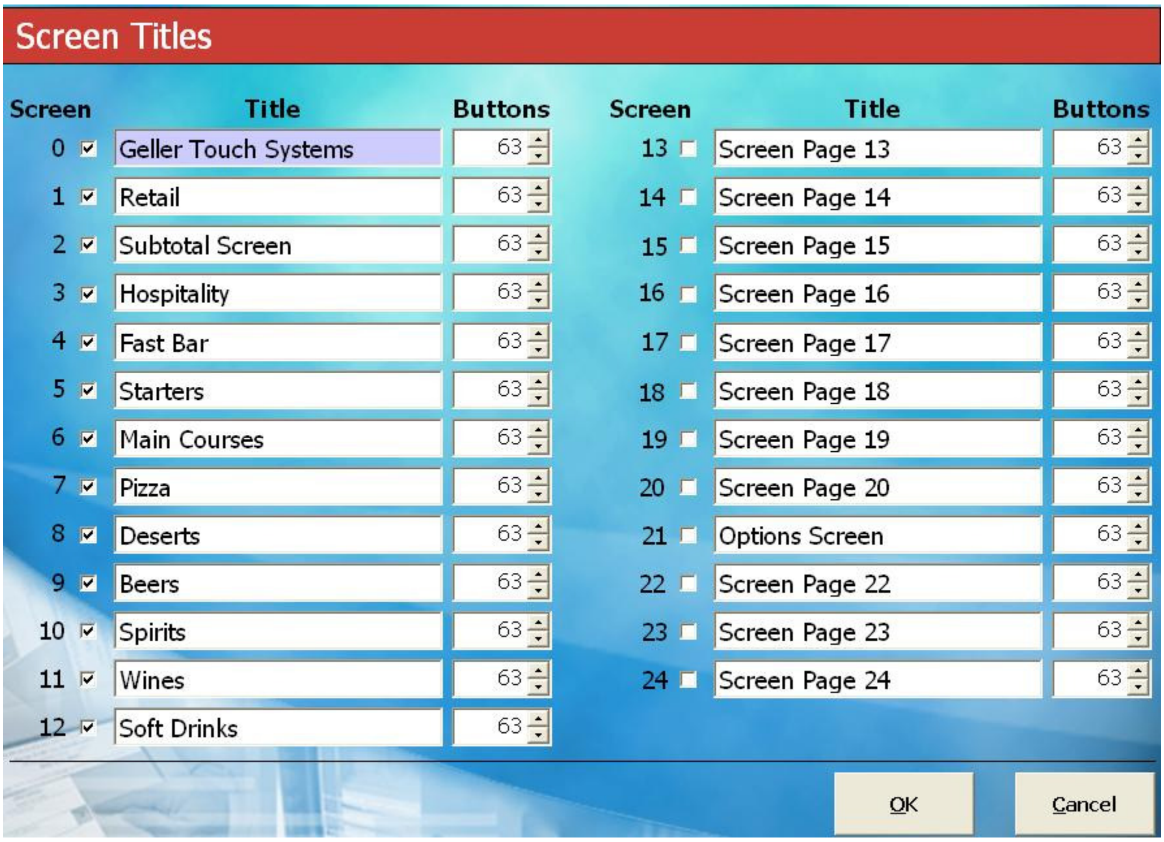
	Quit/Shutdown	Quits CES and shuts down the computer	
	Quit	This button will allow you to exit the software without having to go into back office	
	XPRUN*{program.exe}	Calls another program e.g. osk.exe which runs the on screen keyboard	XPRUN*notepad.exe
	Run*{Program.exe}	Calls another program e.g. osk.exe which runs the on screen keyboard	XPRUN*notepad.exe
	Run import	Run import form defined in system settings manually	
	Back-Office	Enter back office	
	Back Space	Emulates the back space function on a keyboard	
	Nnnn*TENDER#m	Where n is the tender amount in pence and m is the tender number	Tender#1 = cash sale OR 500*Tender#1 = £5.00 quick tender This assumes that tender 1 is cash
	??? Exchange	Hotcode for any exchange key or direct foreign exchange key	Euro*exchange
	No Sale	Open the cash drawer to perform a no sale	

Screen Set Up

Use Server Screen Button File
Sale Grid Location
Default Screen Number

There are a maximum of 24 screens that can be configured for use on the terminals
You can name these screens in

- Utilities
- System Menu
- Screen Titles



☝	Only tick the screens that you want to be loaded when the system starts up – the more you have ticked the longer it will take to load

☝	You can change the number of buttons on the terminal screen by using the up and down arrows or typing a value into the buttons field

Accessing screens

Designing and editing layouts is done from the screen that is currently displayed.

To access the screen from back office

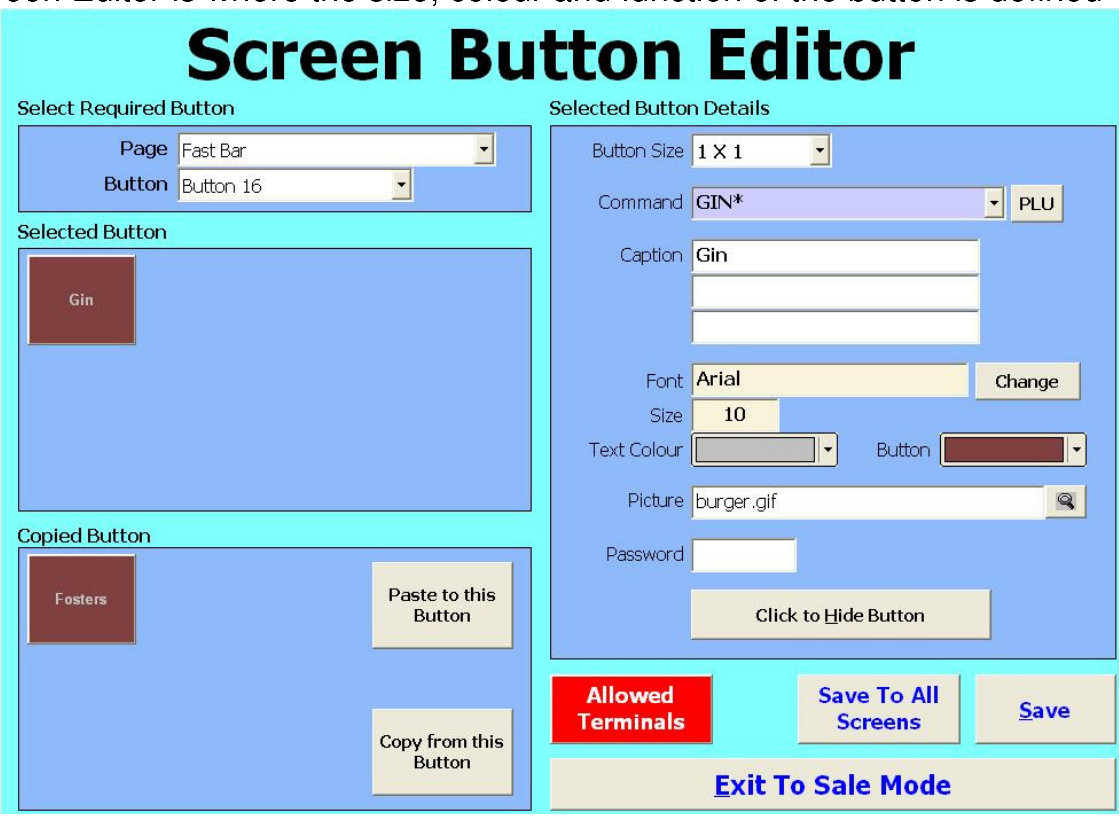
- Sales Review
- Sales Mode
- Log on using Manager (password 1066)

Screen Actions

<Shift> + Click Button = Screen Button Editor
<Ctrl> + Click Button = Remove function from button
<Ctrl> + Click Button on same button again = Remove button from screen

Using Screen Editor

Screen Editor is where the size, colour and function of the button is defined



- ➢ Page = Screen Title as set in the Screen Titles option in back office, you can use the drop down to select the correct page to display this button on
- ➢ Button = the button number you want to edit, the default will be the button you have 'shift - clicked'
- ➢ Button Size = The number of buttons across and down this will use

E.g. 1x1 = 

2x1 = 

- Command = what this button is or will do e.g. GIN* is the product of Gin that is sold, COVERS asks for the number of covers in the transaction

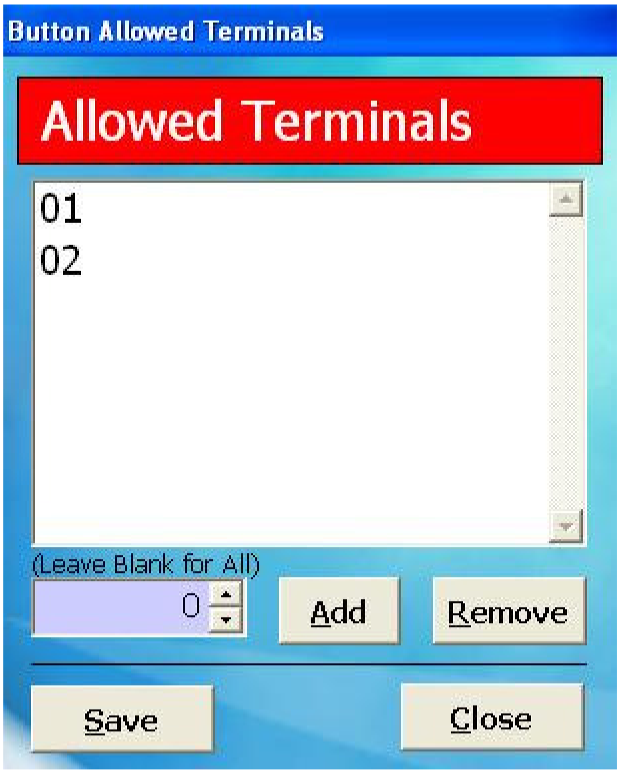
See the list of commands for details and examples

You can use the PLU button to look up a product

- Caption = the wording that will appear on the button
- Font = the font that will appear for the caption
- Size = the size of the font for the caption
- Text Colour = colour of the caption text
- Button = background colour of the button
- Picture = Displays the selected picture on the button (c:\touch\images\button)
- Password = if you want to password protect this button enter the password to be used
- Click to Hide Button = press this if you no longer want to show this button on this screen
- Allowed Terminals = Allows you to decide which terminals this button should be shown on e.g. you may not want the covers function in the bar but you do in the restaurant

Click Show Button so that the button is visible after editing

When using buttons larger than 1x1 you need to use ctrl click to hide any single buttons that overlap



Simply add the terminal numbers that you want to allow this button on or leave it blank to show on all

- Save to All Screens = save the changes made to all 24 screens

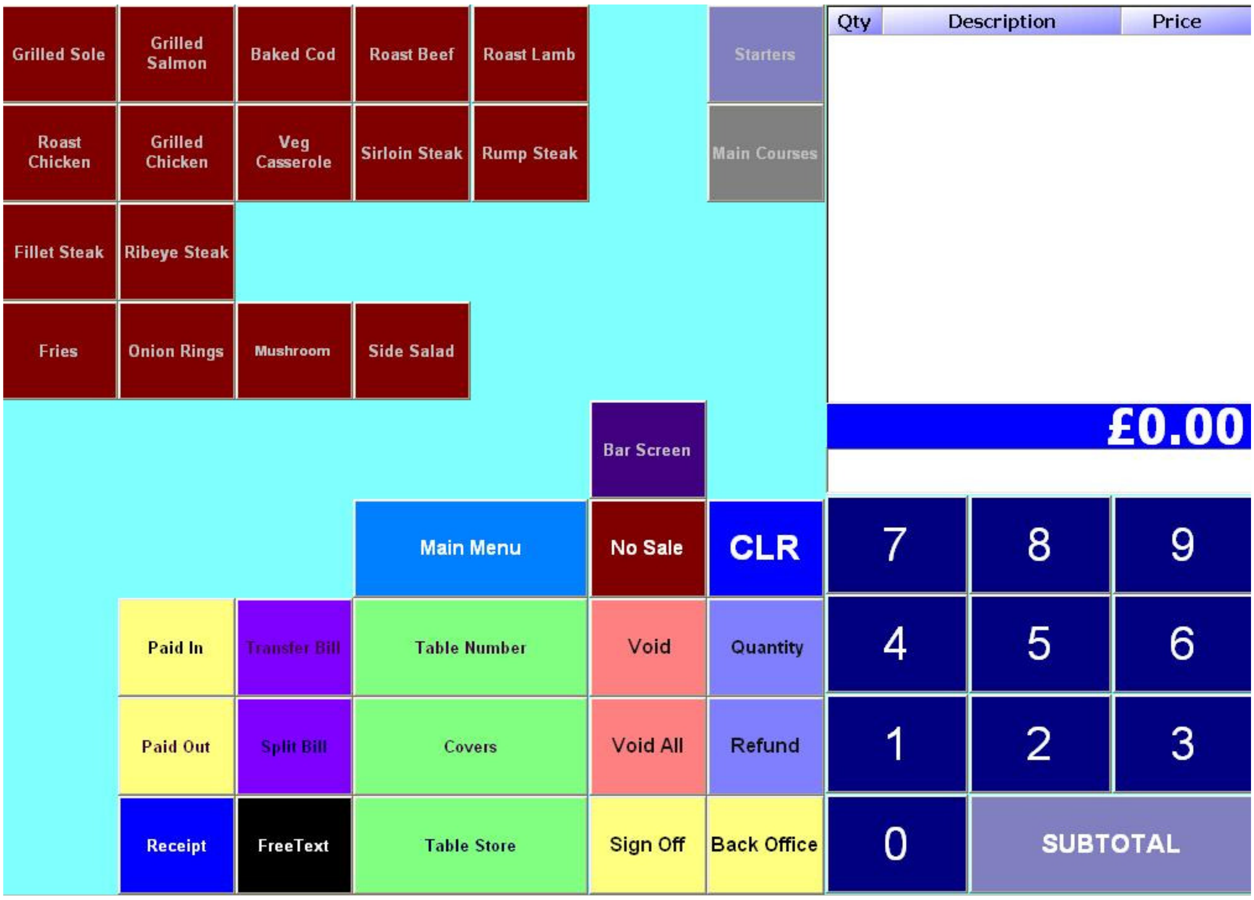
☝	Be careful – if you have designed screen 1 and make a change on screen 12 the change will take place on screen 1 and overwrite what you have done (when using save to all)

- Save = saves the changes on the screen chosen only
- Exit to Sales Mode = takes you back to the sales mode screen
- Copy from this Button = copies the properties of the button you are editing
- Paste to this Button = Pastes the properties of the copied button

☝	When copying and pasting if the button sizes are different they will not automatically resize

Example:

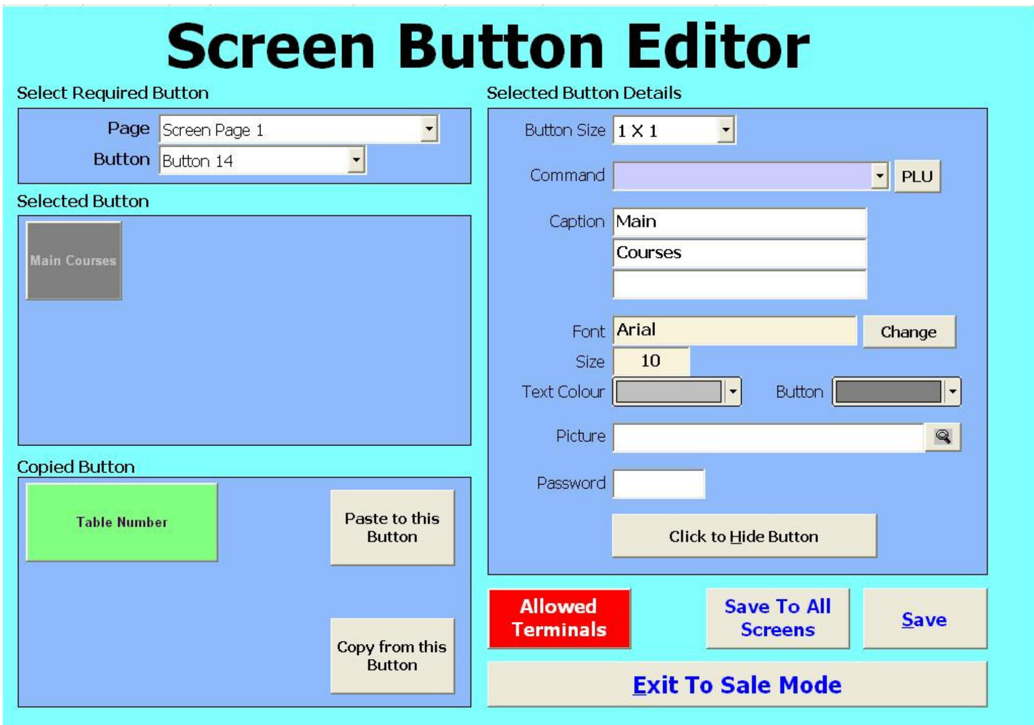
This is screen page 1



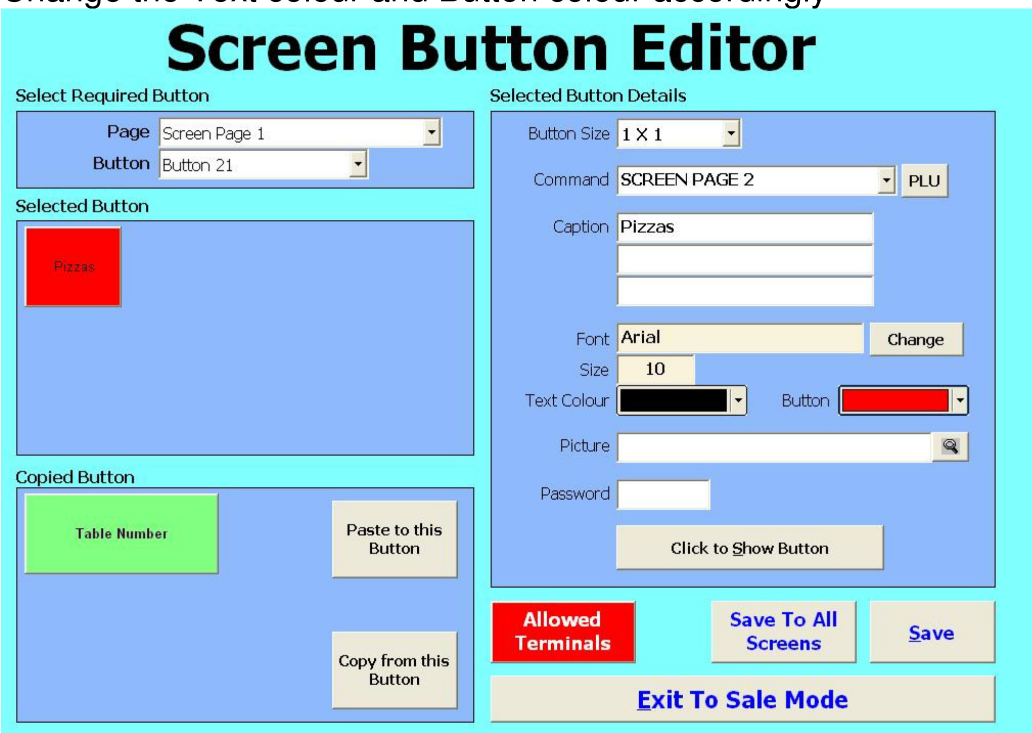
I want to add a new button below main courses to take me to screen page 2; however there is no button there to edit as it has been hidden

<Shift> and click on Main Courses

This will display the screen editor for button14, the button that we want to edit is 7 buttons away as the buttons are numbered top left to right so 14 +7 = 21



- Change the button to button 21 (this is the position you want your new button to be in)
- Enter in the command field – ScreenPage 2
- In the caption field enter Pizza
- Change the Text colour and Button colour accordingly



- Select Click to Show Button
- Select Save

Your Pizzas button is now on the screen

- Select the new Pizzas button – this will take you to screen page 2 so you can begin to edit this screen

☝	Remember anything that you have created and saved to all screens will be shown

Repeat the process on this screen to create the buttons that you want

☝	If all buttons on a screen have been deleted; edit a button on another screen page then change the screen number to give you a button to work from

Sales Mode

Basic User Operations (Hospitality)

	Allow Creation of PLU's on the fly in Sales Mode Print Freetext on Receipt Print Freetext on Remote Department Menu Version Delete layaways with end of day report Layaways by Operator Print receipt with transaction layaway Allow multiple selections from product search in Sales Print Unit Modifier in front of Remote Text Remove 'Extra' from Condiment Descriptions Print Covers on Receipt Repeat Table No/Covers but not items on Remote

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

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

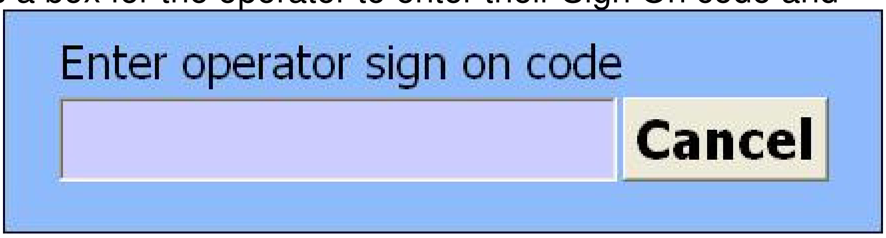
To access Sales Mode from the Back Office

- Select

- Select

An example of a typical Hospitality layout

Signing on to the till
There are 4 main ways of signing on to a till
Dallas Key – this is a fob that is attached the till (usually on the card swipe)
Manual Sign On – this is a box for the operator to enter their Sign On code and confirm their password



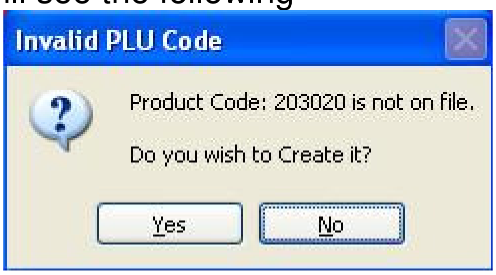
Button Sign On – this is a displayed button on the Sign On screen, it will also prompt for a Password if the user has been allocated one

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

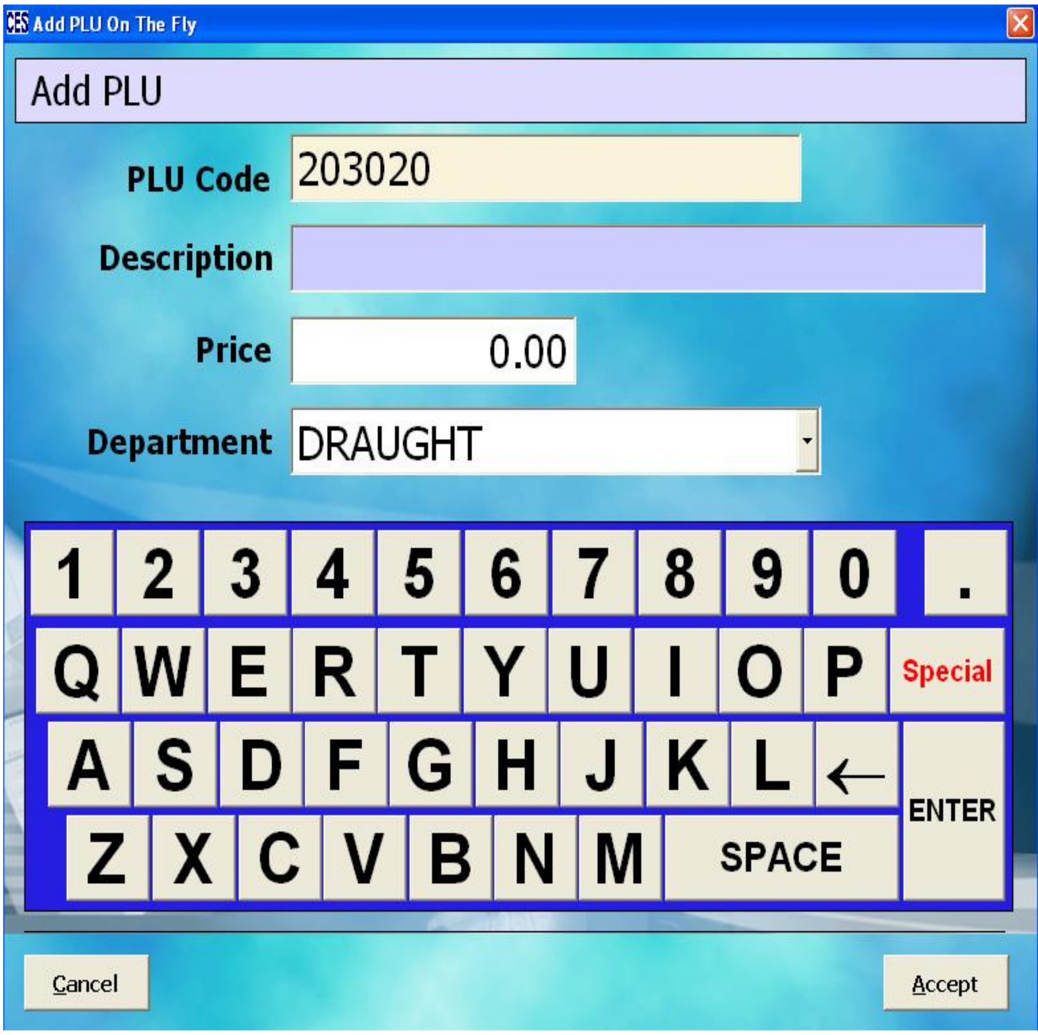
Making a Sale

- Select the product to be sold from the keyboard layout

The selected product and its price will be displayed in the transaction screen
If the product is not recognised because it does not exist there is a setting that can be switched on to allow you to create products ‘on the fly’ in sales mode
You will see the following



- Select Yes



- Enter the description, price and select the correct department
- Select Accept

The product will be pulled onto the transaction screen

Using the Quantity Button

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

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

- Select the product

The selected product and its price will be displayed in the transaction screen

Selling with a Modifier

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

- Select the modifier button

- Select the Product

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

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

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

Free Text

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

- Select

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

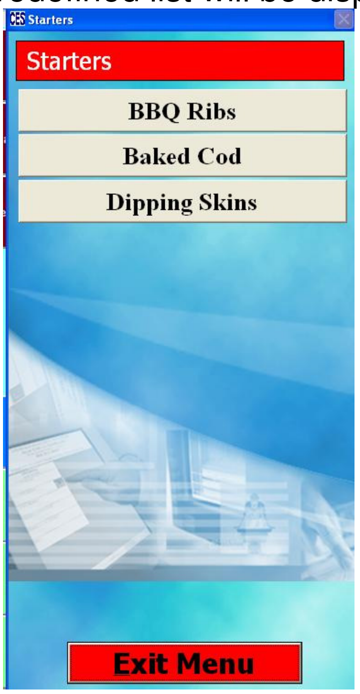
☝	The product must be sold before you can use this function

Using a menu

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

- Select the Menu button

The predefined list will be displayed



- Select the required product from the list or exit the menu

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

Selling Products with Condiments

Condiments are extras that can be added to a profile of a product.
When a product with a Condiment is selected the Condiment window is displayed

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

Layaway

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

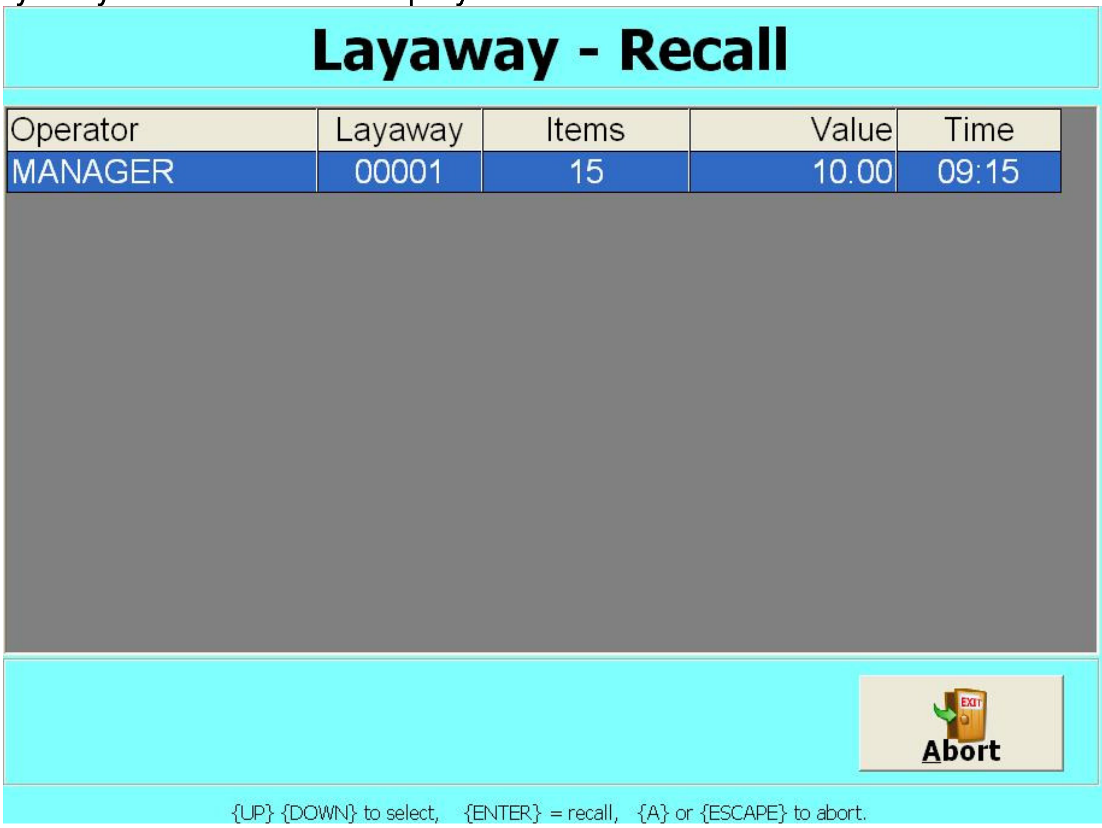
- Select

The transaction will disappear and the main screen displayed

To recall a transaction that has been laid away

- Select

The Layaway recall screen is displayed



- Select the transaction to be recalled
- Select

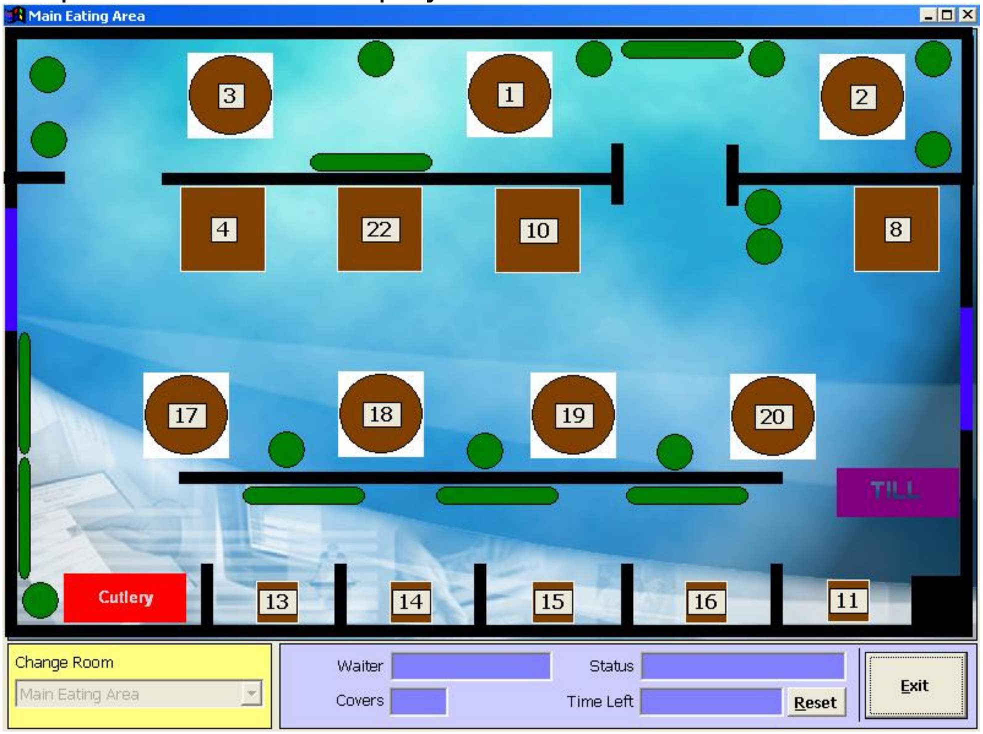
The transaction is recalled to the transaction pane as normal

Storing to Tables/Tabs

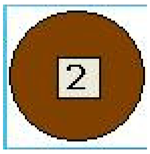
Tables (with table planner) are used predominantly in the Restaurant environment
If you are in a transaction and want to store the products to a table:

- Select

The table planner screen is displayed



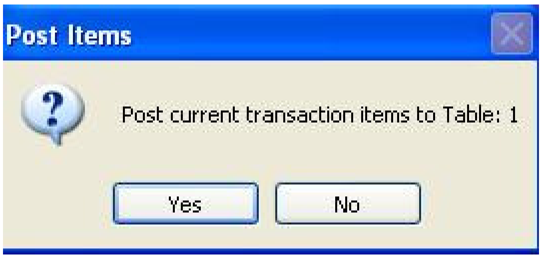
- Select the table number



The following message will appear

- Select Yes

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



- Select Yes
- Select

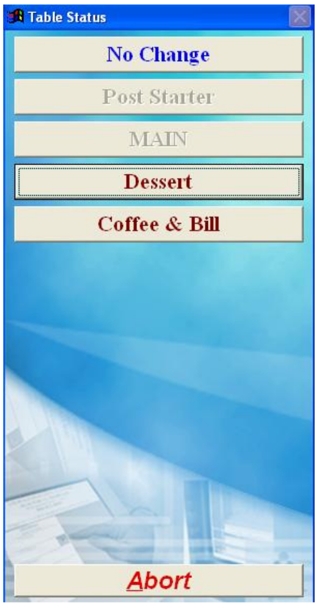
Table Status

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

In this example

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

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



- Select No Change if the table status remains the same

If they are now having Dessert the Dessert status should be selected

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

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

Covers

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

- Select the number from the number pad
- Select

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

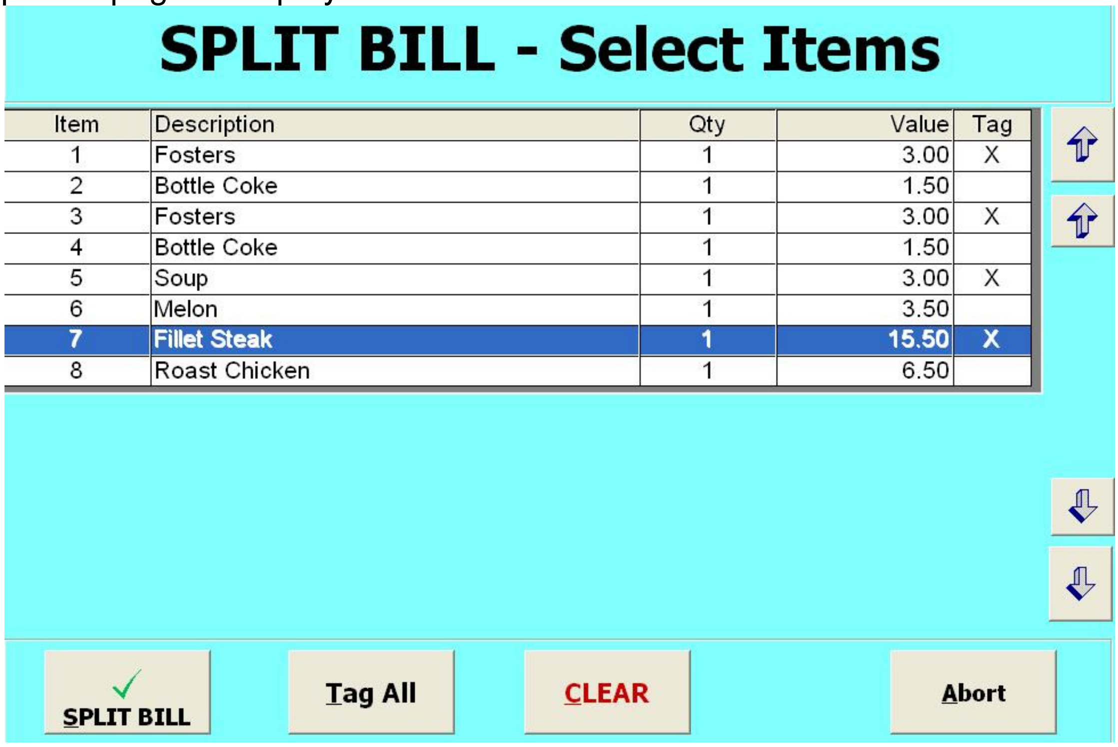
If you have the prompt setting switched on the system will automatically prompt for the number of covers

Splitting the Bill

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

- Recall the table
- Select

The Split Bill page is displayed



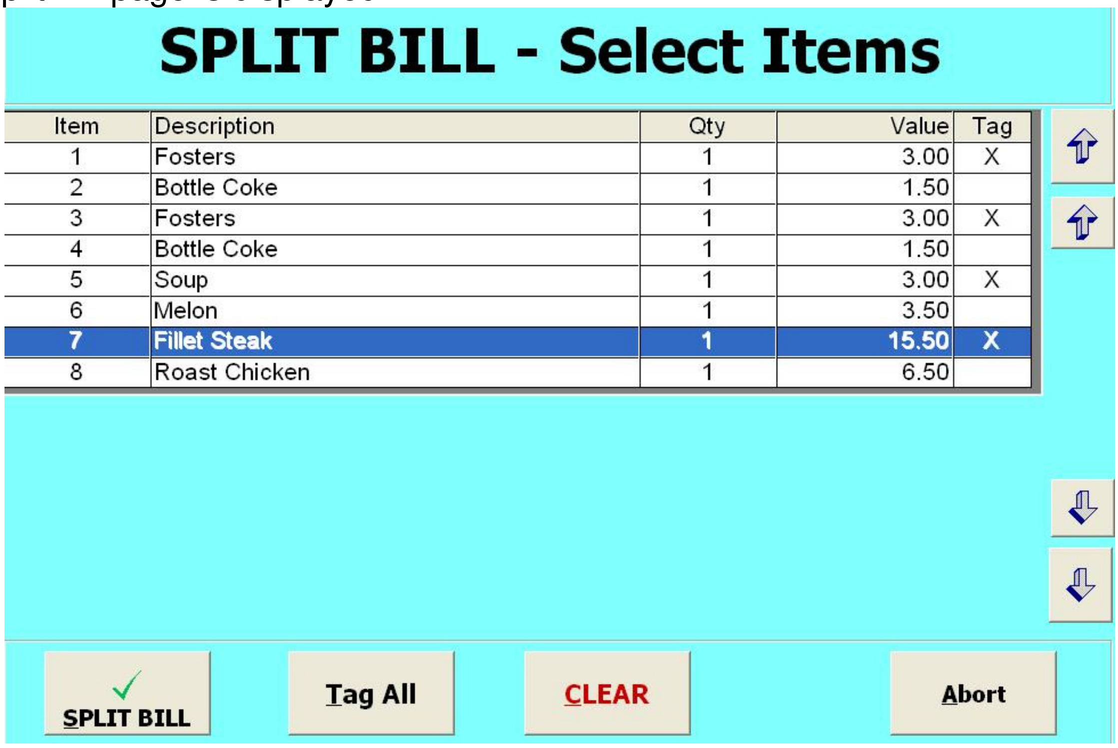
- Select the items to be taken off of the current bill by clicking on the line
- Select

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

Moving products to another table

- Recall the table
- Select

The Split Bill page is displayed



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

The products appear on the transaction screen

- Select

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

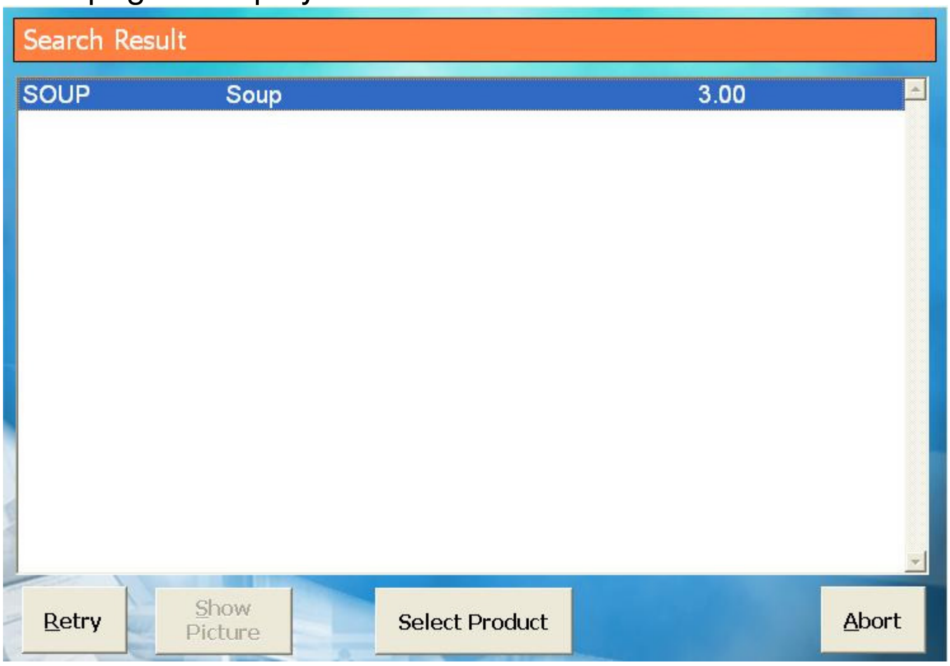
Product Search

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

- Select

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

The results page is displayed



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

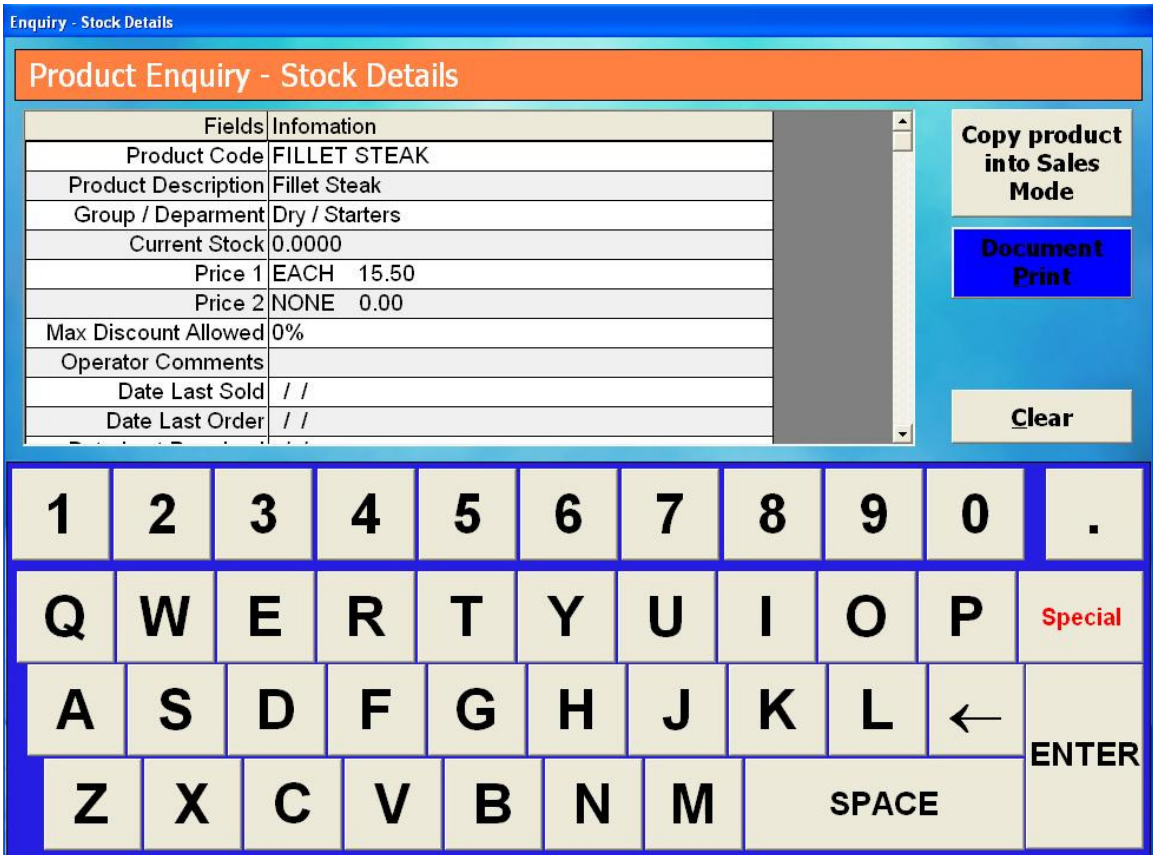
☝	If you cannot find the product using the search facility try un-ticking the ‘Include Only Items In Stock’

Product Enquiry

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

- Select

The Product Enquiry – Stock Details Page will be shown

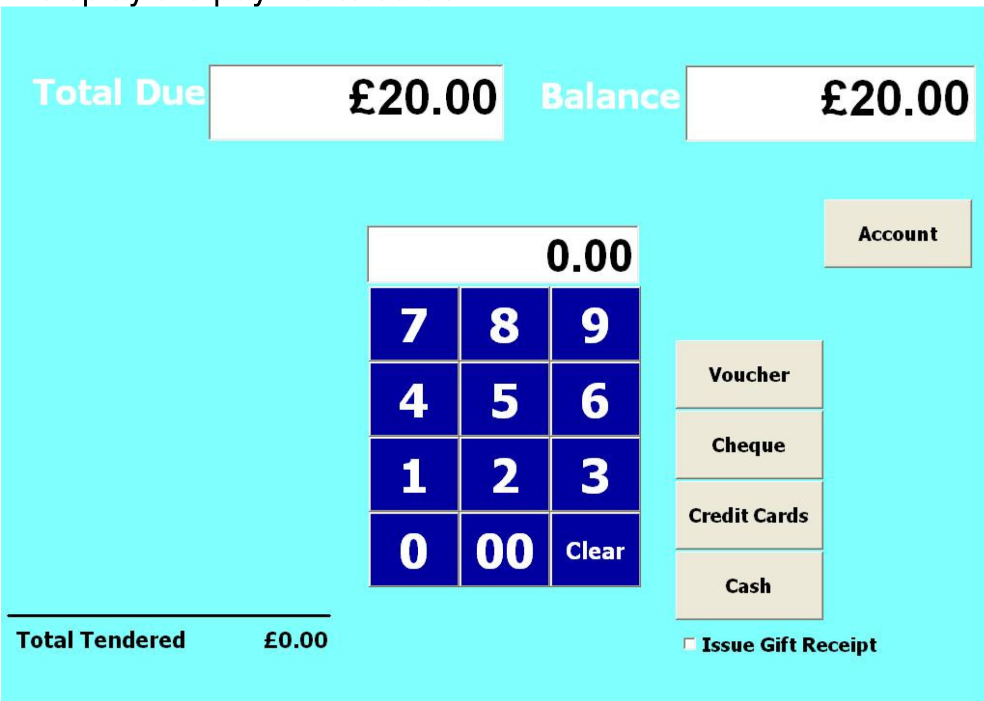


Paying a transaction

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

- Select

This will display the payments screen



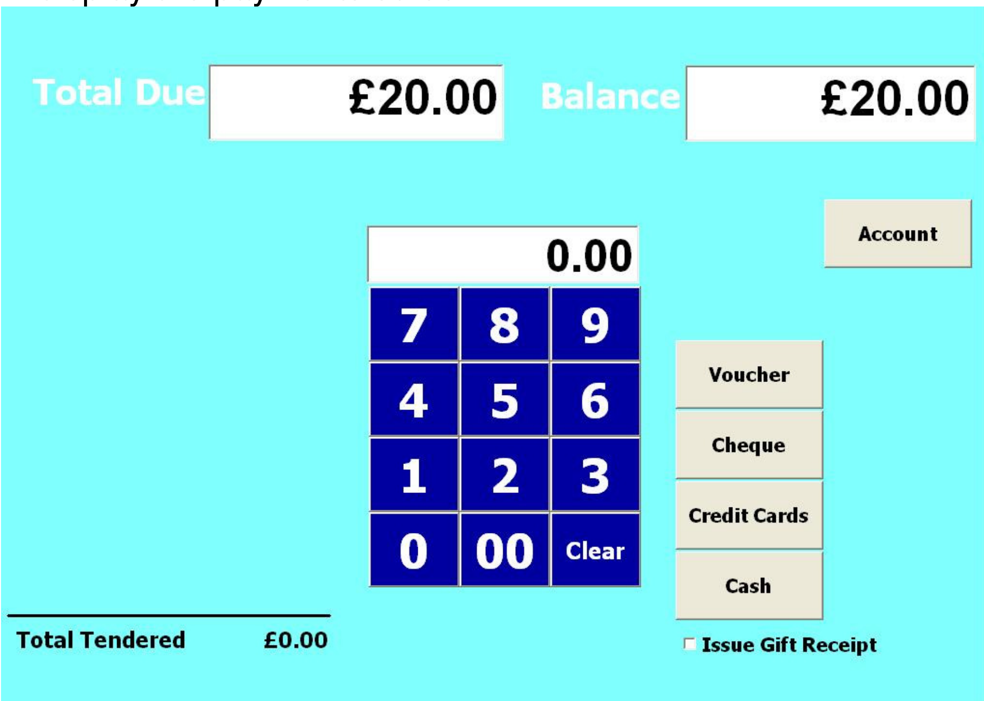
- Using the numeric keypad enter the amount that is being tendered *e.g. 2000*
- Select the tender type from the right hand side *e.g. cash*

To accept multiple Tender Types

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

- Select

This will display the payments screen



- Using the numeric keypad enter the amount that is being tendered *e.g. 500*
- Select the tender type from the right hand side *e.g. cash*

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

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

Printing a Receipt

- Select

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

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

Basic User Operations (Retail)

	Allow Creation of PLU's on the fly in Sales Mode **Print Freetext on Receipt** **Print Freetext on Remote** **Department Menu Version** **Delete layaways with end of day report** **Layaways by Operator** **Print receipt with transaction layaway** **Allow multiple selections from product search in Sales** **Use Gift Receipts?**

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

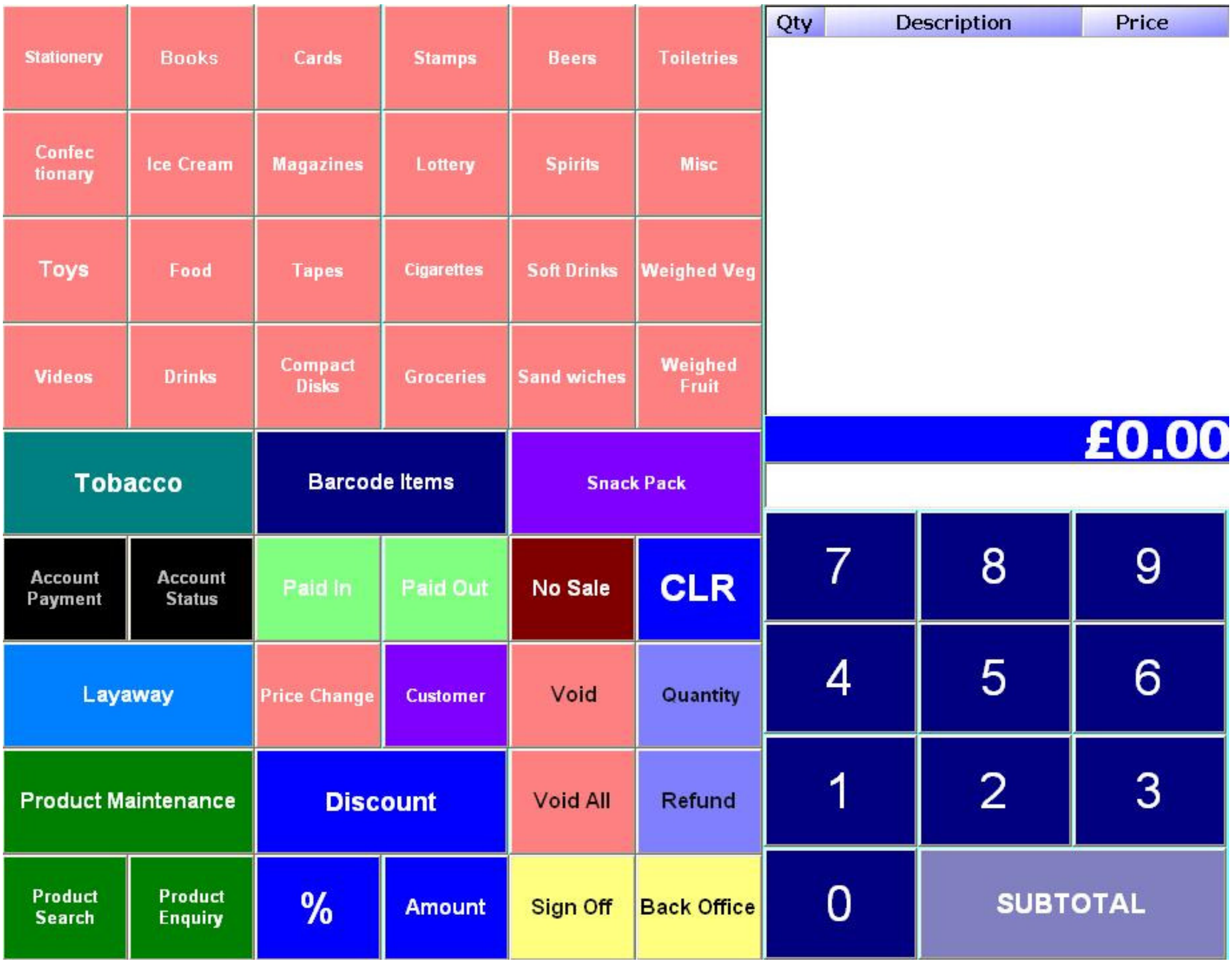
Sales Mode is the function which allows you to run a point of sale (till); from Sale Mode you can carry out sales, process refunds manage tabs and tables amongst other things

To access Sales Mode from the Back Office

Select

Select

An example of a typical Retail layout

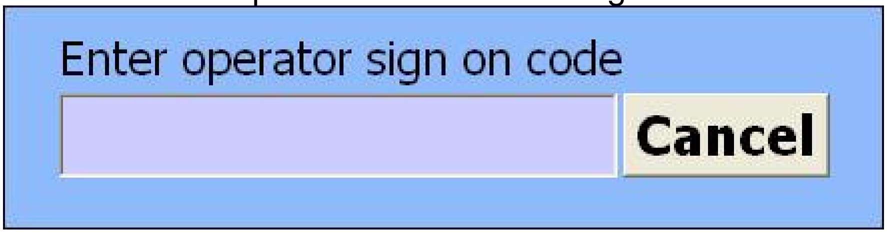


Signing on to the till

There are 4 ways of signing on to a till

Dallas Key – this is a fob that is attached the till (usually on the card swipe)

Manual Sign On – this is a box for the operator to enter their Sign On code and



confirm their password

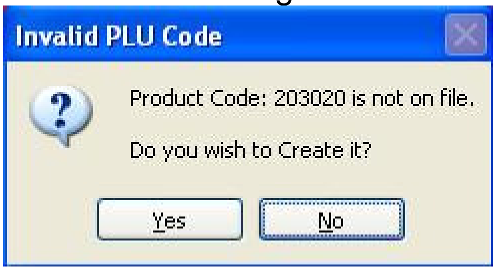
Button Sign On – this is a displayed button on the Sign On screen; it will also prompt for a Password if the user has been allocated one

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

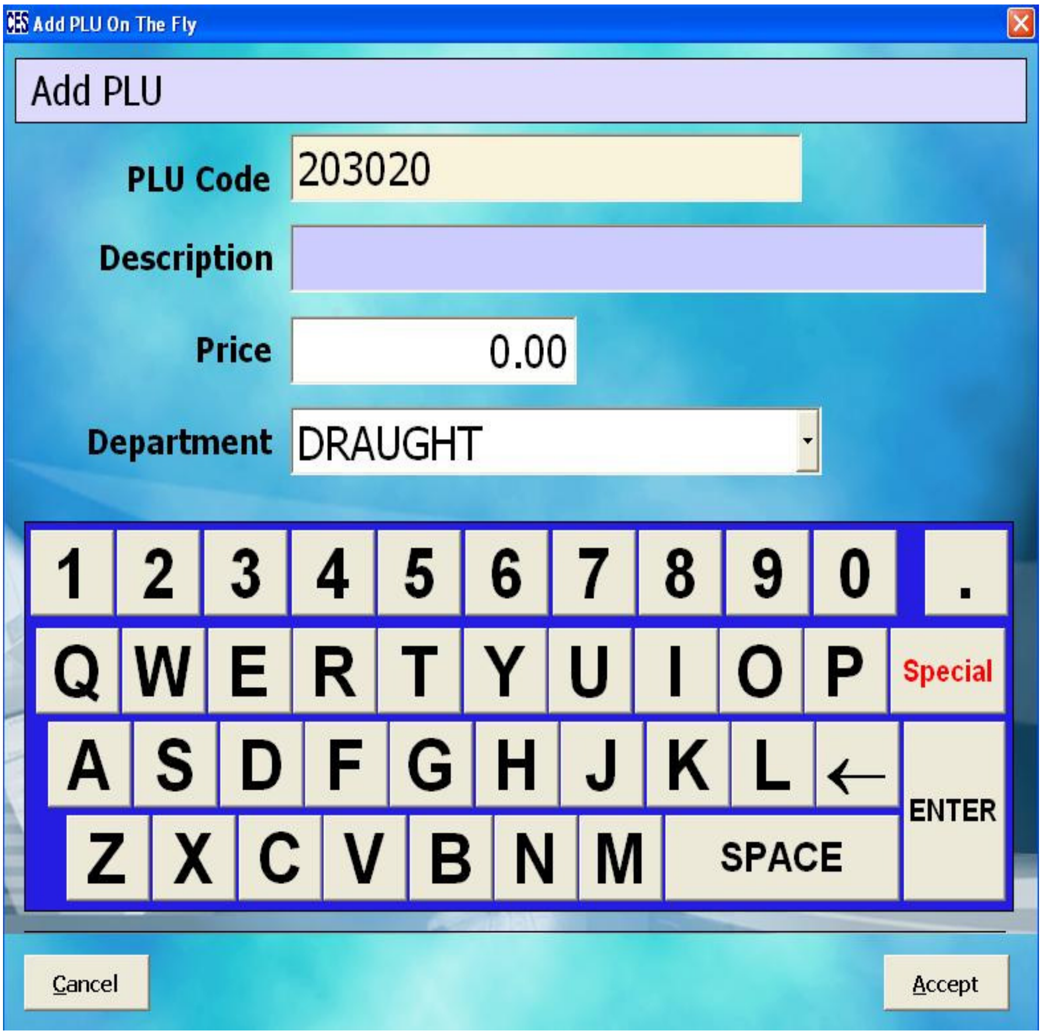
Making a Sale

- Select the product to be sold from the keyboard layout

The selected product and its price will be displayed in the transaction screen
If the product is not recognised because it does not exist there is a setting that can be switched on to allow you to create products 'on the fly' in sales mode
You will see the following



- Select Yes



- Enter the description, price and select the correct department
- Select Accept

The product will be pulled onto the transaction screen

Product code

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

- Enter the PLU e.g. 12345
- Select

The product and price appears in the transaction pane

Using the Quantity Button

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

- Select the product

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

Free Text

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

- Select

Enter the text that you want to print beneath your product

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

Using a menu

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

- Select the Menu button

The predefined list will be displayed

- Select the required product from the list or exit the menu

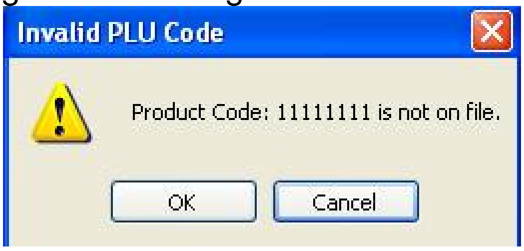
The selected product and its price will be displayed in the transaction screen

Using the scanner for products with barcodes

- From Sales Mode hold the product with the barcode across the beam from the scanner

The product name and price appears in the transaction pane

If you get this message



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

Layaway

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

- Select

The transaction will disappear and the main screen displayed

To recall a transaction that has been laid away

- Select

The Layaway recall screen is displayed

- Select the transaction to be recalled
- Select

The transaction is recalled to the transaction pane as normal

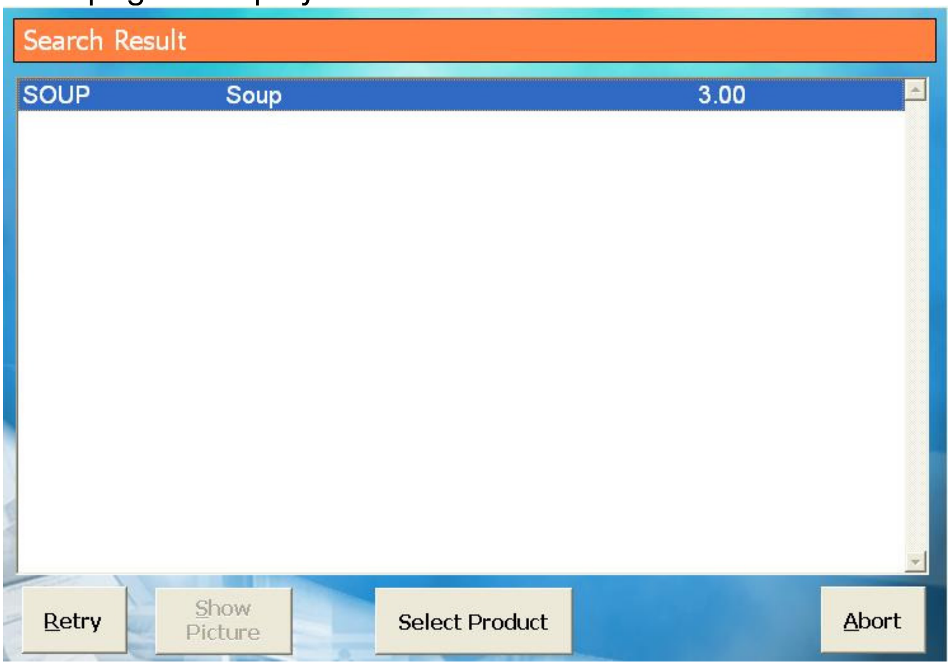
Product Search

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

- Select

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

The results page is displayed



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

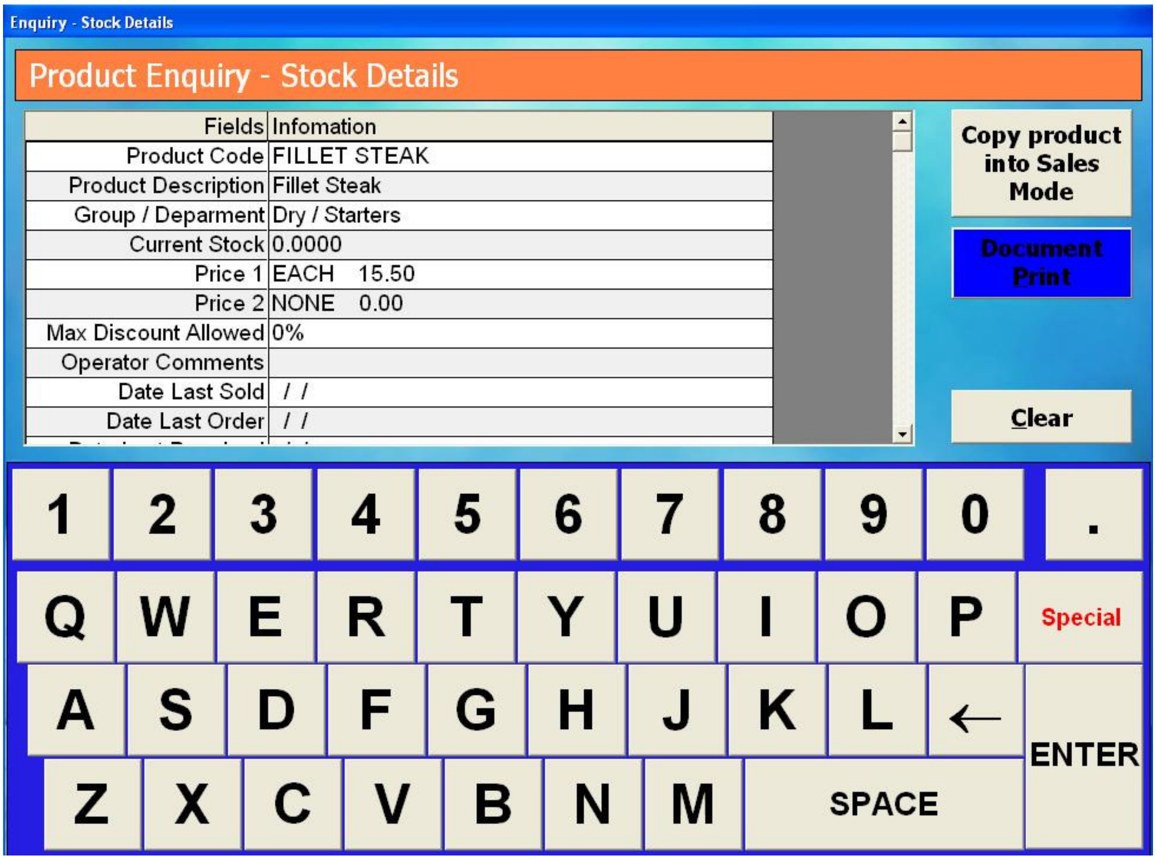
☝	If you cannot find the product using the search facility try un-ticking the 'Include Only Items In Stock'

Product Enquiry

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

- Select

The Product Enquiry – Stock Details Page will be shown

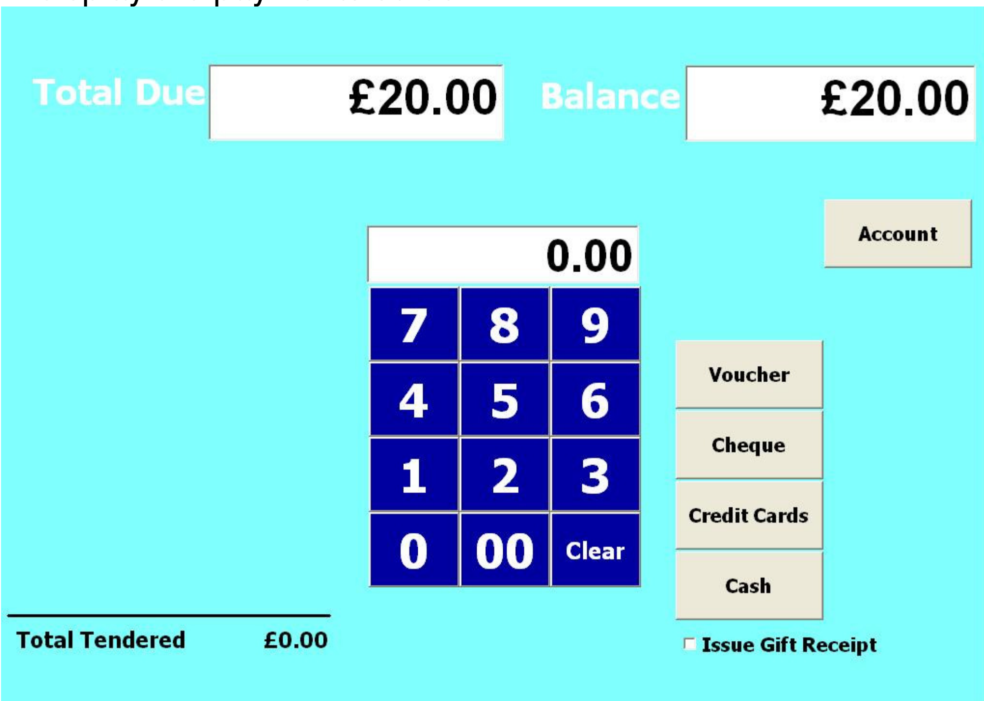


Paying a transaction

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

- Select

This will display the payments screen



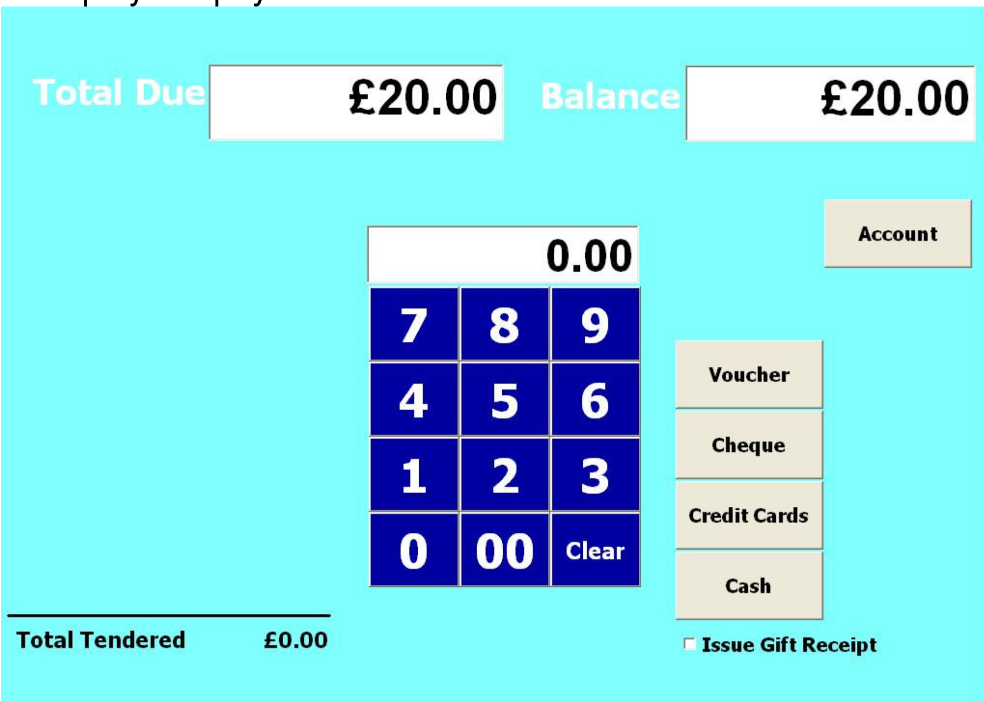
- Using the numeric keypad enter the amount that is being tendered *e.g. 2000*
- Select the tender type from the right hand side *e.g. cash*

To accept multiple Tender Types

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

- Select

This will display the payments screen



- Using the numeric keypad enter the amount that is being tendered *e.g. 500*
- Select the tender type from the right hand side *e.g. cash*

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

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

Printing a Gift Receipt
From the Subtotal screen select:

Printing a Receipt:

- Select

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

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

Functions

	Print Discount on Receipt **Print Discount Reason on Receipt** **Use Price Shift Discounts as Discounts in EOD** **Print Signature Receipts for Voids** **Print Void All Receipt** **Store 'Void All' with Sales Data** **Voids Have Reason Codes?** **Allow Mix and Match with Refunds** **Print Refund Reason on Receipt** **Print Refunds on Remote Printers** **Issue Receipt with No Sale** **Allow Credit Notes to be Issued in Paid Out?** **Update Master Price when using Price Change Button**

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

Fixed Discount

- Ring the items through
- Select

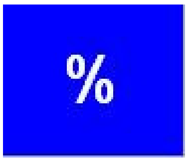
This will discount the transaction by the predefined amount

Item Discount

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

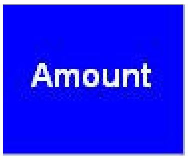
- Ring the item through
- Select

- Enter the amount e.g. 10
- Select either



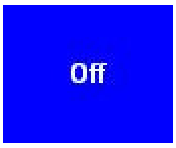
this will reduce the item selling price by 10%

Or



this will sell the item for 10p

Or



this will take 10p off of the selling price

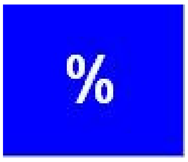
All Discount (Subtotal Discount)

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

- Ring the items through
- Select

Enter the percentage amount to be discounted

- Select



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

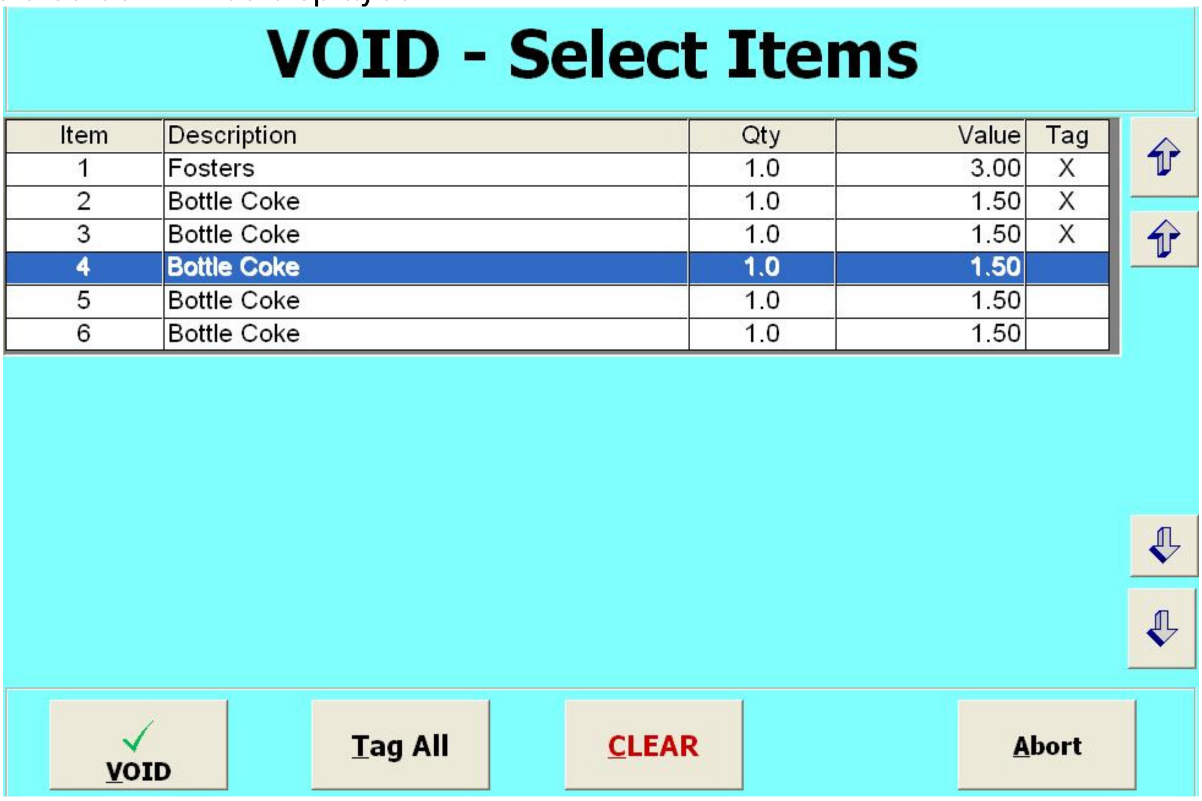
Void/Void Entire Transaction

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

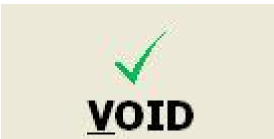
To remove 1 item or a selection of items

- Select

The void screen will be displayed



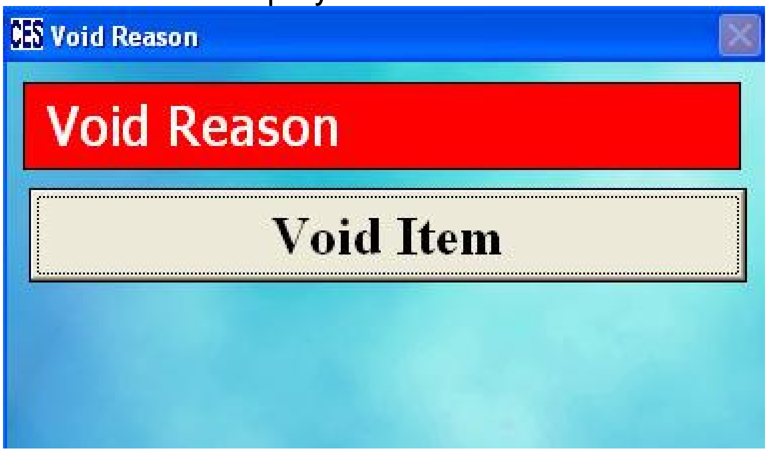
- Tag the item/items to be removed
- Select



Void Entire Transaction

- Select

The reason menu is displayed



- Select the reason

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

Refund Item

This will allow the operator to refund an item

- Select

- Select the product to be refunded

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

Refund Current Transaction

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

- Ring the products through to be refunded
- Select

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

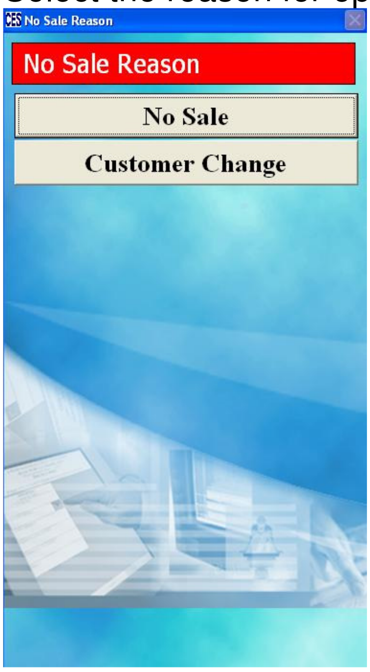
☝	The refund function will automatically add the product back in to stock.

No Sale

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

- Select

- Select the reason for opening the drawer



Paid Out

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

- Select

The Paid Out window is displayed

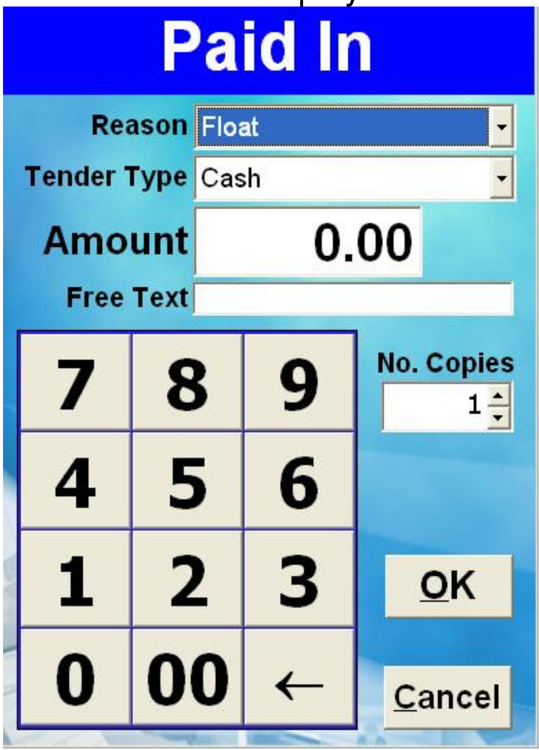
- From the drop down box select the reason for the function
- From the drop down box in the ‘Tender Type’ field select the method the person was given
- Type the amount in the ‘Amount’ field
- The free text field is for any extra notes you may want to add e.g. if it was Petty Cash you could add milk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

Paid In

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

- Select

The Paid In window is displayed



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

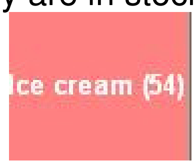
Price Change

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

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

The Price Change Window is displayed

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

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

Terminal Reports

Current Financial

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

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

Archive/Central – Sales

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

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

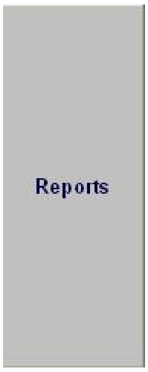
	Overall Commission Value
Operator Sales	User Defined Period By Operator Number and Value of Transactions Nett Sales Tender Type breakdown Number of No Sales Number and Value of Voids Loyalty Point Issued VAT Analysis
Group/Dept	User Defined Period Period Totals Group Value and Volume Department Value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

End of Day

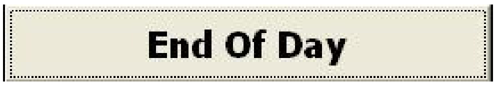
The End of Day routine should be run at the end of each trading day. The slave tills should be declared first and the software exited and shut down, then the Master Till should be declared last

	Run EOD before Transaction Cleardown **Tender Declaration with EOD** **Use Price Shift Discounts as Discounts in EOD**

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

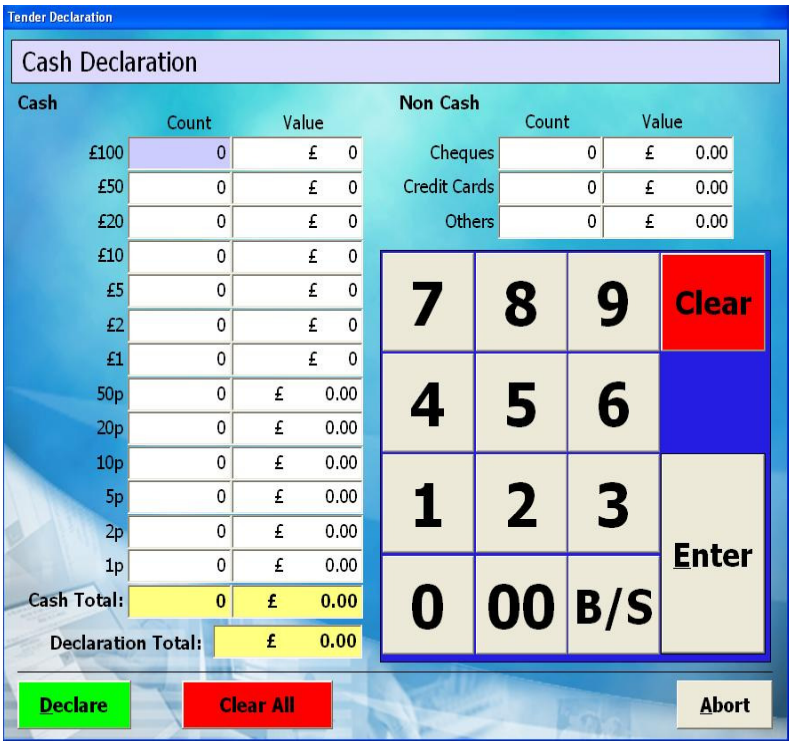


- Select



Cash Declaration

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



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

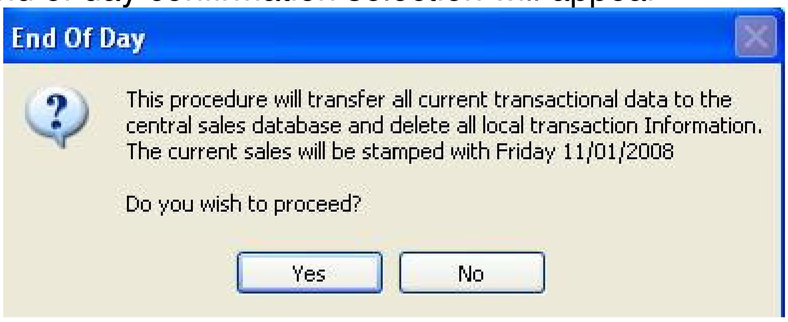
Or

- Select

The Select Date box is displayed

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

The end of day confirmation selection will appear



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

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

Sales Review

	Disable void transaction within review

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

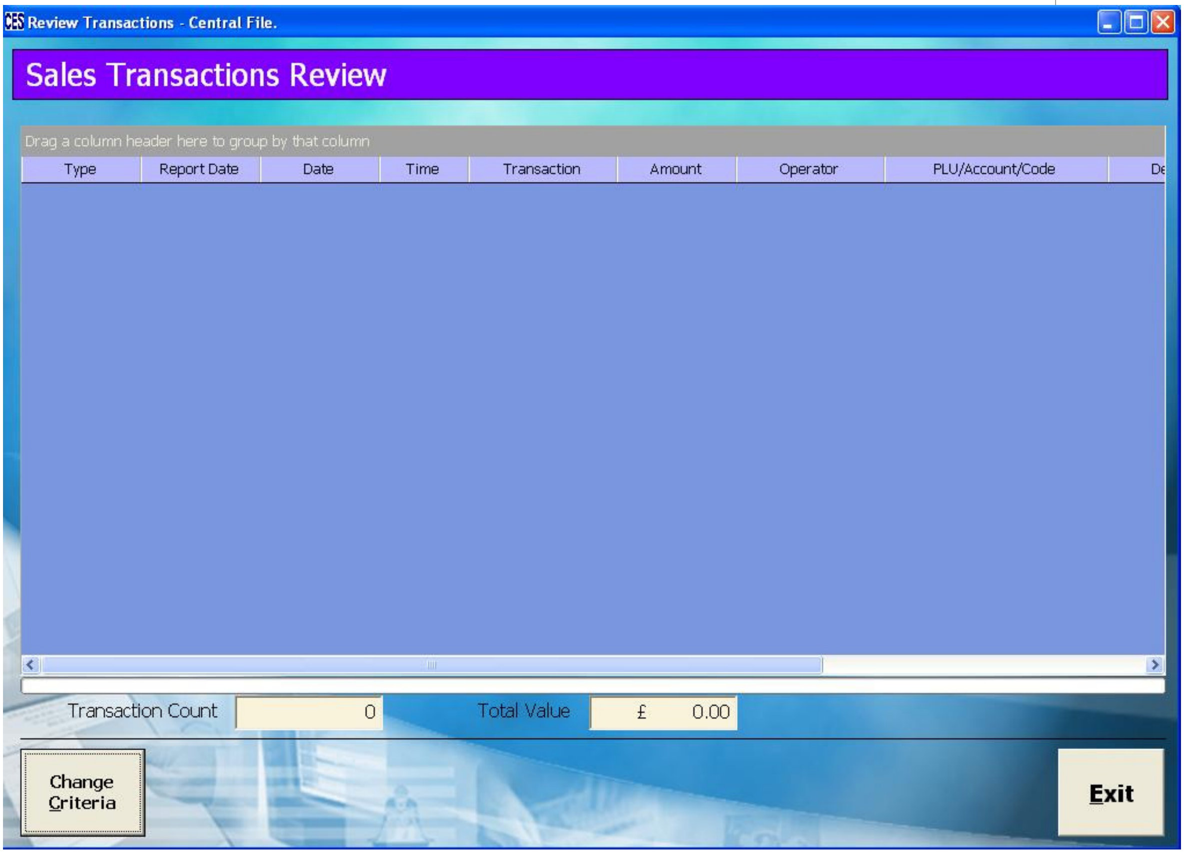
Central/Archive Sales

- Select

- Select

The Sales Transaction review screen will be shown

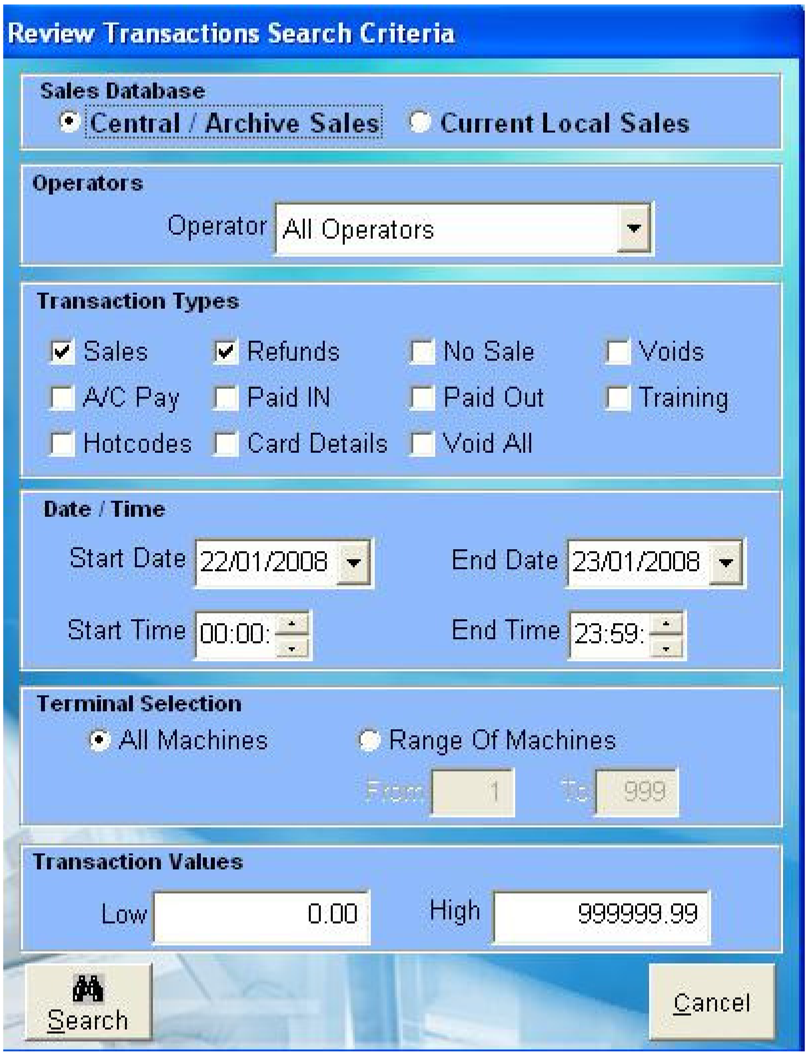
☝	Note: the screen may show data if a search has been done and the software has not been closed



To find a transaction from a past date

- Select

The search criteria screen is displayed

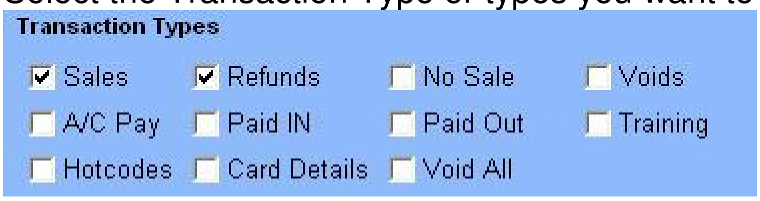


☝	To be in Central/Archive Sales the End of Day process must have been done, the date chosen at end of day will be the date the sales will appear in reports

- Leave the default as Central/Archive Sales

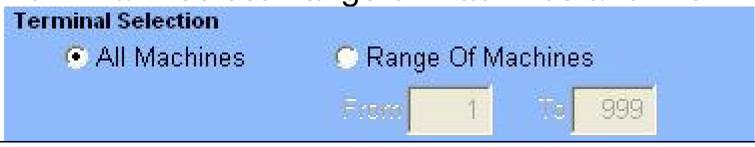
- Select the Operator (if known) if not keep as All Operators

- Select the Transaction Type or types you want to find



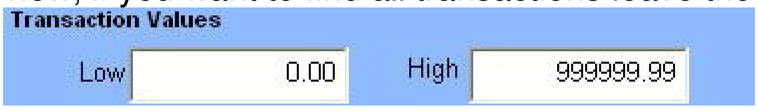
- Select the date or the date range of the transactions you want to view, if you want you can narrow this down by time by using the start and end time selections

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



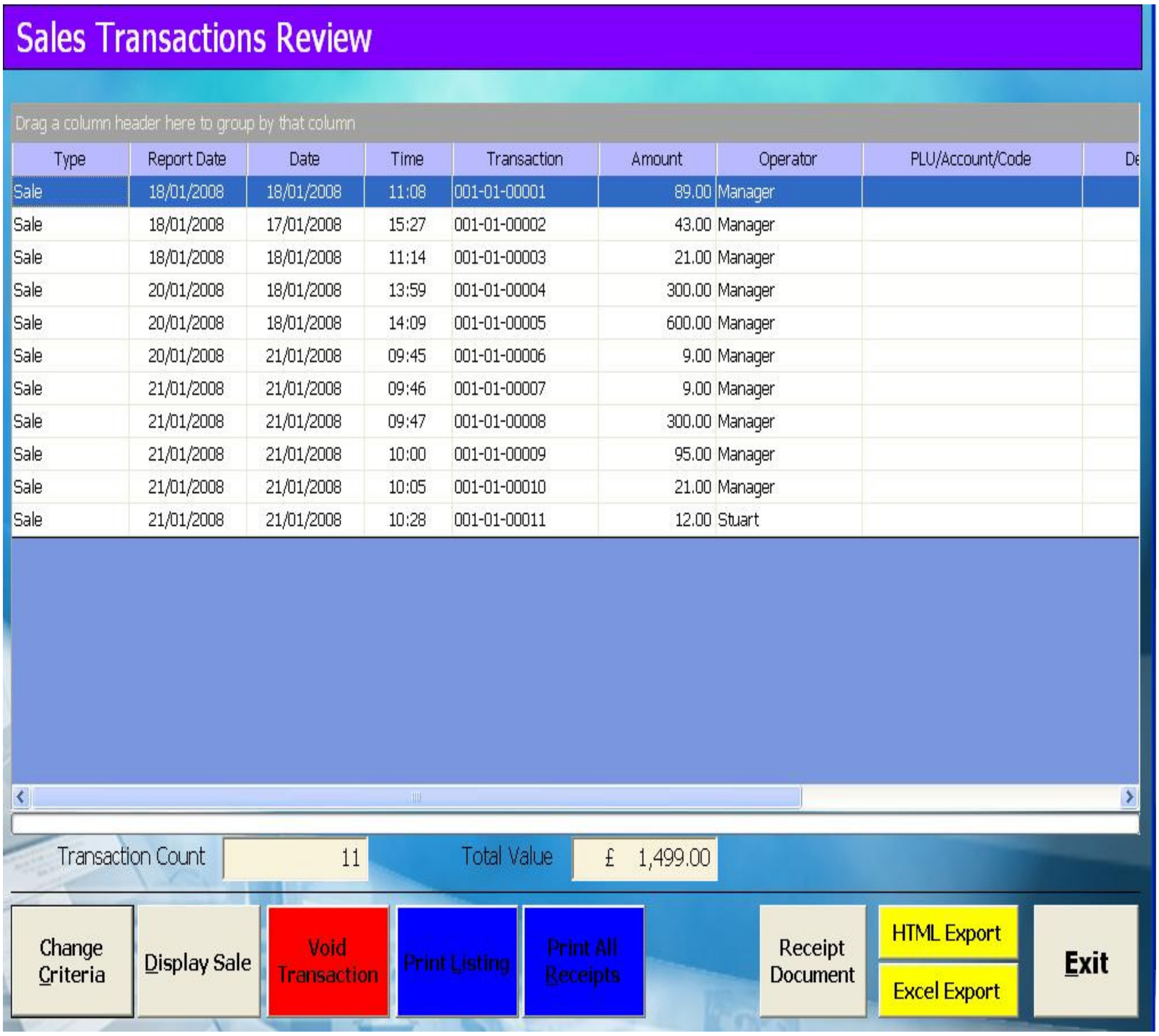
	The terminal is the till it was cashed off from

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



- Select

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



Highlight the transaction you want to view in more detail

- Select

The transaction detail will be shown

To Print a Copy Receipt

- Select

To exit from the detail view

- Select

To Print an A4 copy of the receipt

- Select

To void the transaction

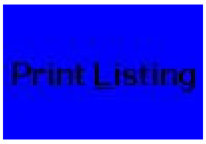
- Select

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

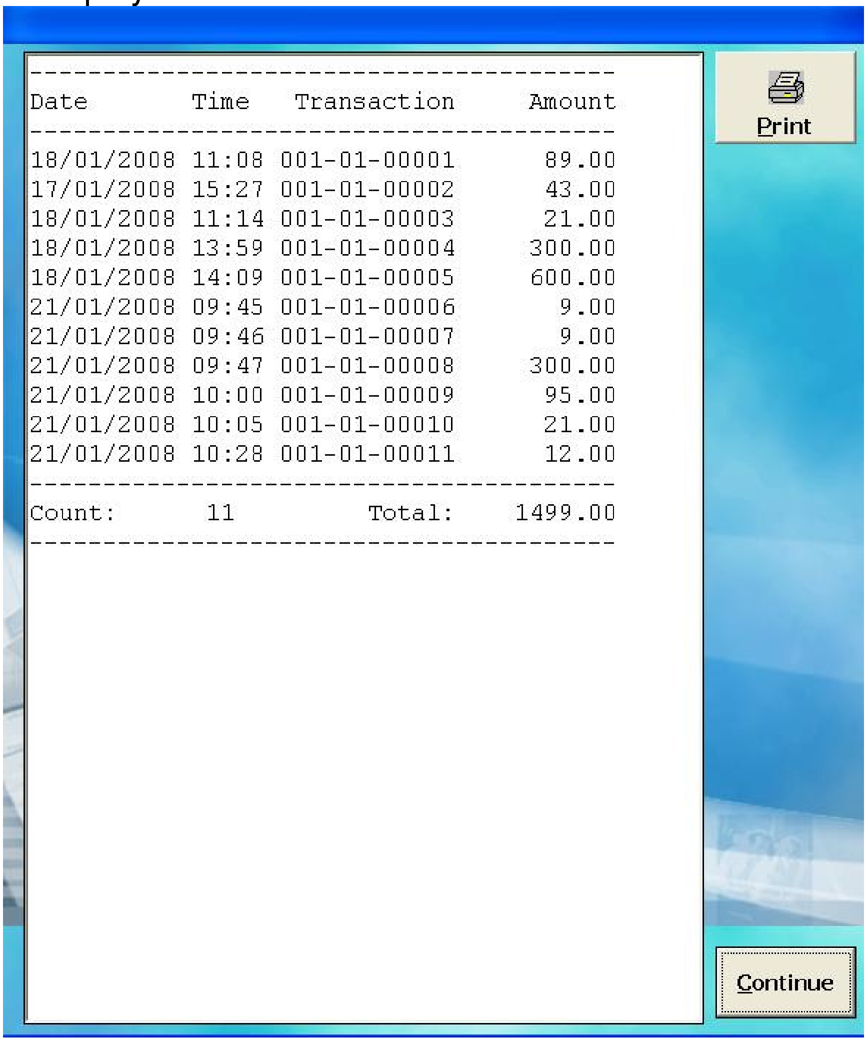
To Print the Search result List from the Receipt Printer

From the Search Result Screen

- Select



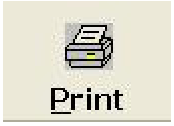
This will display the list of transactions



Date	Time	Transaction	Amount
18/01/2008	11:08	001-01-00001	89.00
17/01/2008	15:27	001-01-00002	43.00
18/01/2008	11:14	001-01-00003	21.00
18/01/2008	13:59	001-01-00004	300.00
18/01/2008	14:09	001-01-00005	600.00
21/01/2008	09:45	001-01-00006	9.00
21/01/2008	09:46	001-01-00007	9.00
21/01/2008	09:47	001-01-00008	300.00
21/01/2008	10:00	001-01-00009	95.00
21/01/2008	10:05	001-01-00010	21.00
21/01/2008	10:28	001-01-00011	12.00
Count:	11	Total:	1499.00

To print this

- Select



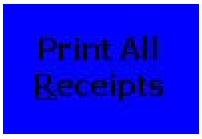
The continue button will exit back to the results screen

To Print a Copy Of a Selection Of Receipts

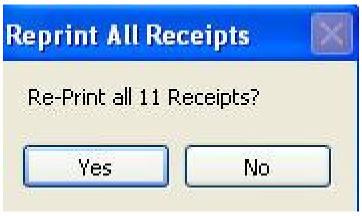
	These will print from the receipt printer

From the search results page

- Select



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



If you do Press Yes if not Press No

To Export to HTML

- Select

To Export to Excel:

- Select

To Change the Current Criteria:

- Select

Serial Tracking

	Use Serial Tracking Reason Codes

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

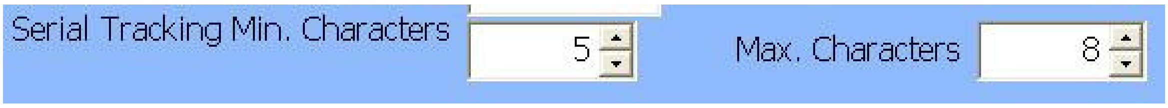
Set up a product for serial tracking

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

- Tick

On the 'Settings' tab

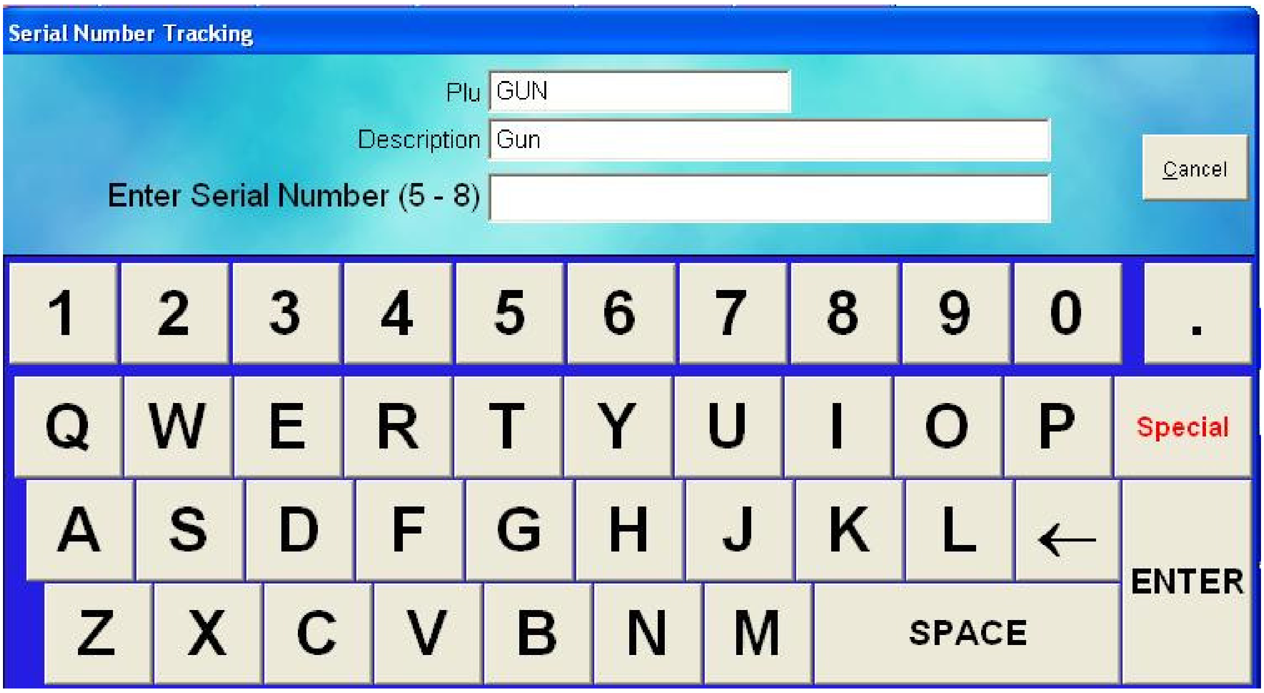
- Set the minimum and maximum number of characters the serial number can have



Selling a Product with serial tracking

On the terminal

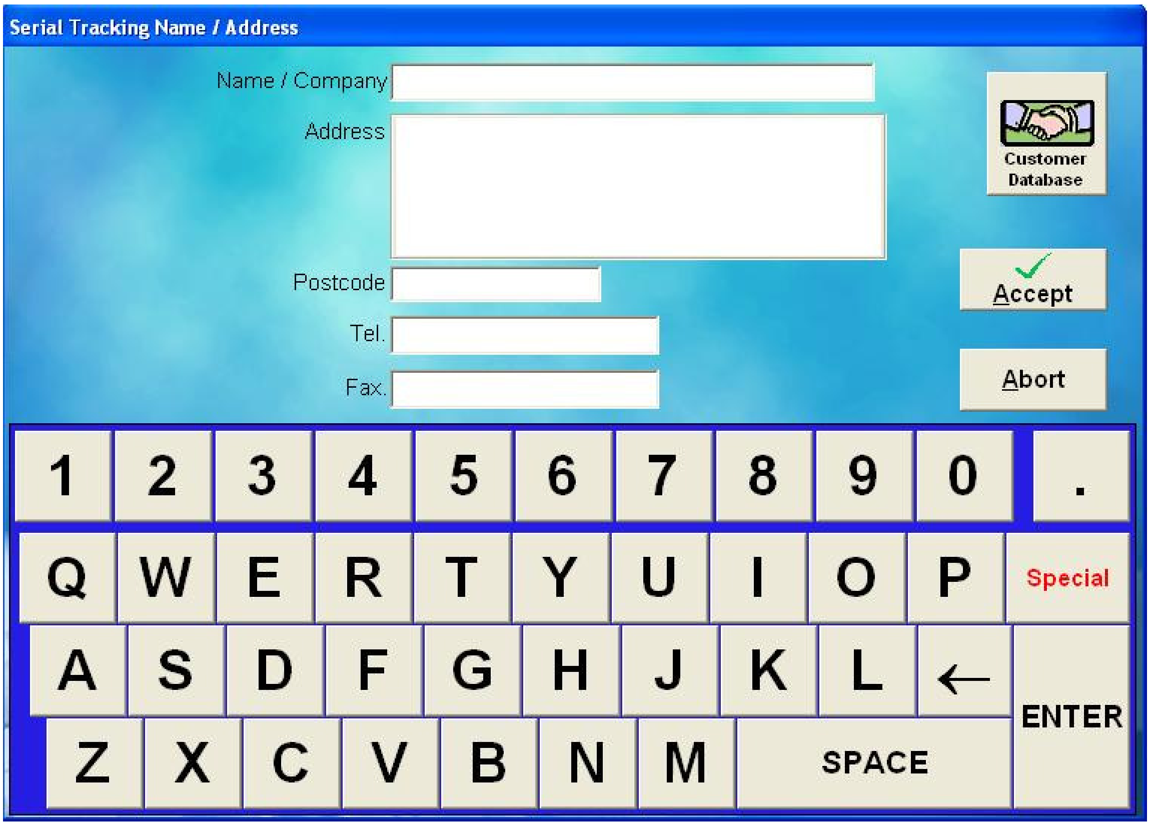
- Select the product to be sold
  The serial tracking number screen is shown



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

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

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



- Enter the customer details

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

- Select the Accept button and the data will be stored

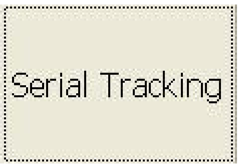
Once the transaction has been completed you can look up the information by using 'Serial Tracking'

Looking up Serial Tracking transactions

From the Back Office

- Select

- Select



The serial tracking screen is displayed

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

Clock In/Out

	Use Operator Clock Functions **Sign off after using clock in/out functions?**

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

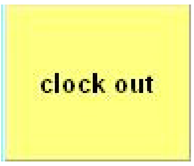
To Clock In

- Log on to the POS
- Select

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

To Clock Out

- Select



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

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

Labels

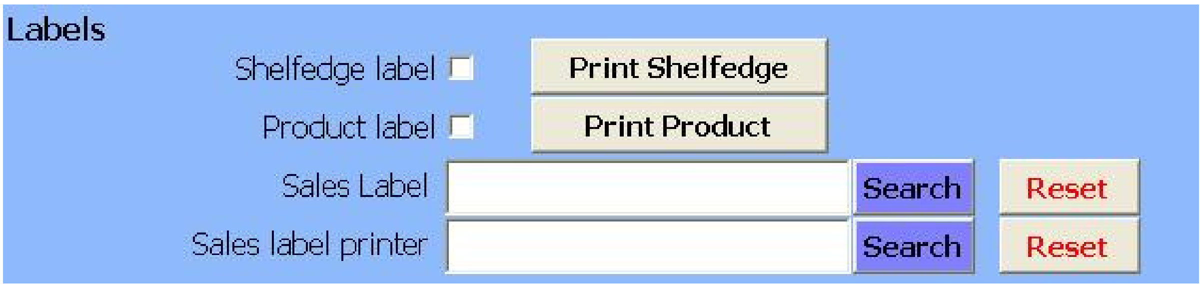
	Label Printer in Use **Label Printer Port**

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

Printing from the Product Record

- Select
  Profile
- Select
  Remotes/Labels/Ghost Items

In the Labels section



- Select the button for the type of label required
  Print Shelfedge or Print Product

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

Or

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

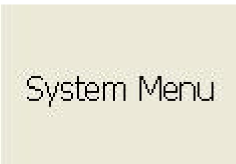
- Select the Quantity of labels required

Printing from the Database

This is for printing labels for a whole department

- Select

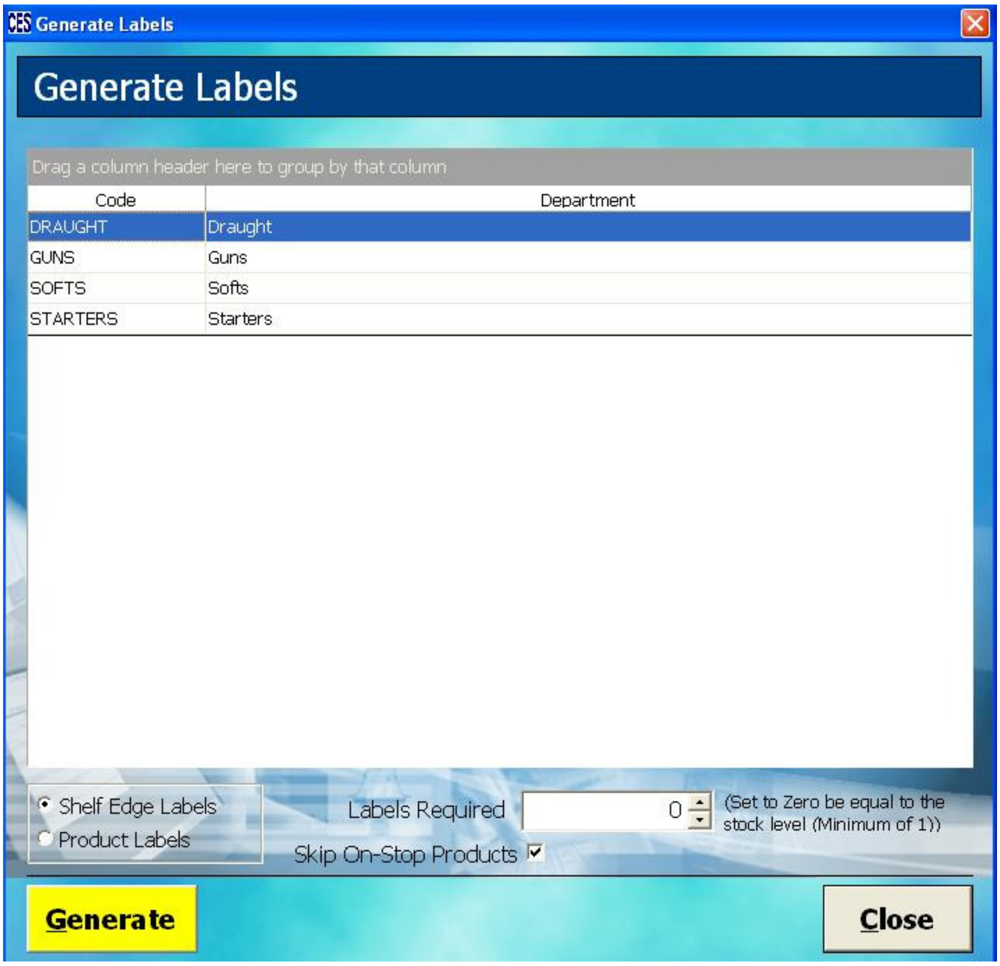
- Select



- Select

- Select

The generate labels screen will be shown



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

- Select the number of labels required

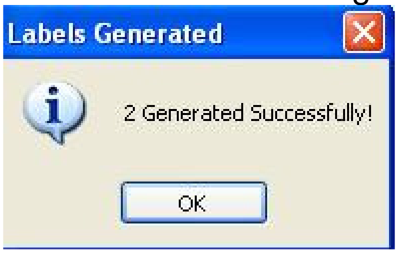
- If you do not want labels for products marked as 'on-stop' tick the box

- Select

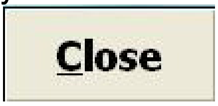
The following message will be displayed

- If correct Press Yes

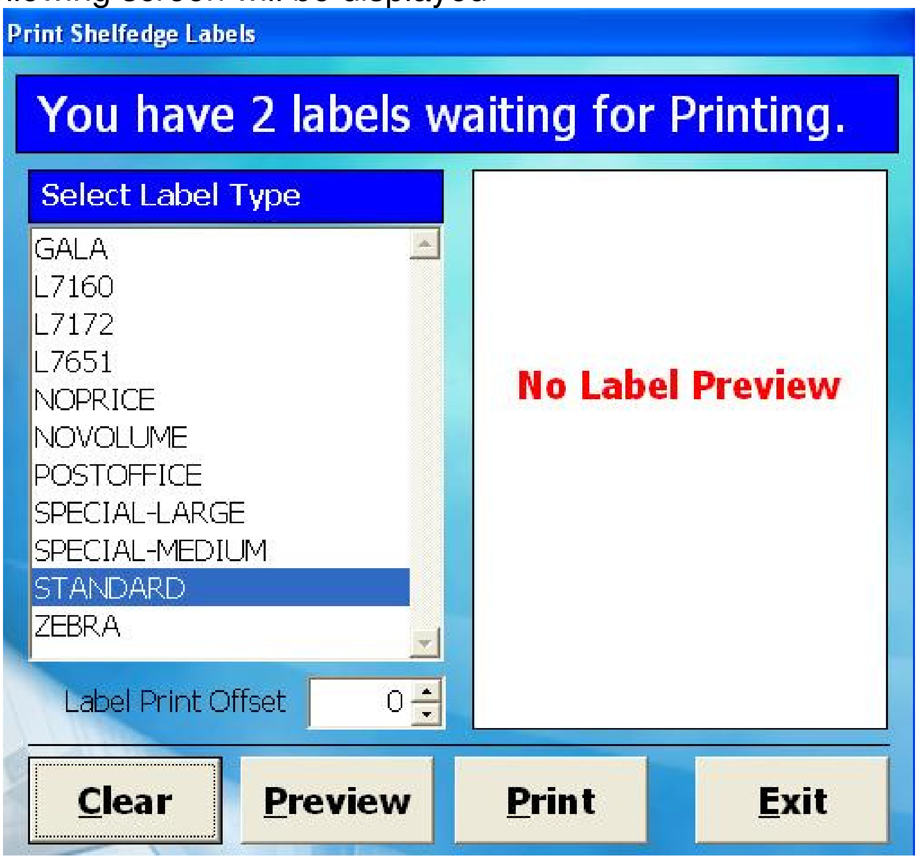
You will then see the following



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



The following screen will be displayed



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

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

Credit Note Set Up

	Credit Note Issue on Tender **Credit Note Redeem on Tender** **Customer Details Required for Credit Notes** **Expiry Period of Credit Notes (Months)** **Number of Credit Note Slips on Issue**

Set up credit notes

In Settings set Credit Note Issue on Tender to 6
Set Credit Note Redeem on Tender to 7

☝	The tender numbers are taken from the tenders screen

In tenders set Credit Issue to Active and Allowed for Refunds
In tenders set Credit Redeem to Active

☝	In tenders set the other options as required

Credit Notes

	Credit Note Issue on Tender **Credit Note Redeem on Tender** **Customer Details required for Credit Notes** **Display Credit Remaining or Current Balance** **Expiry Period of Credit Notes (months)**

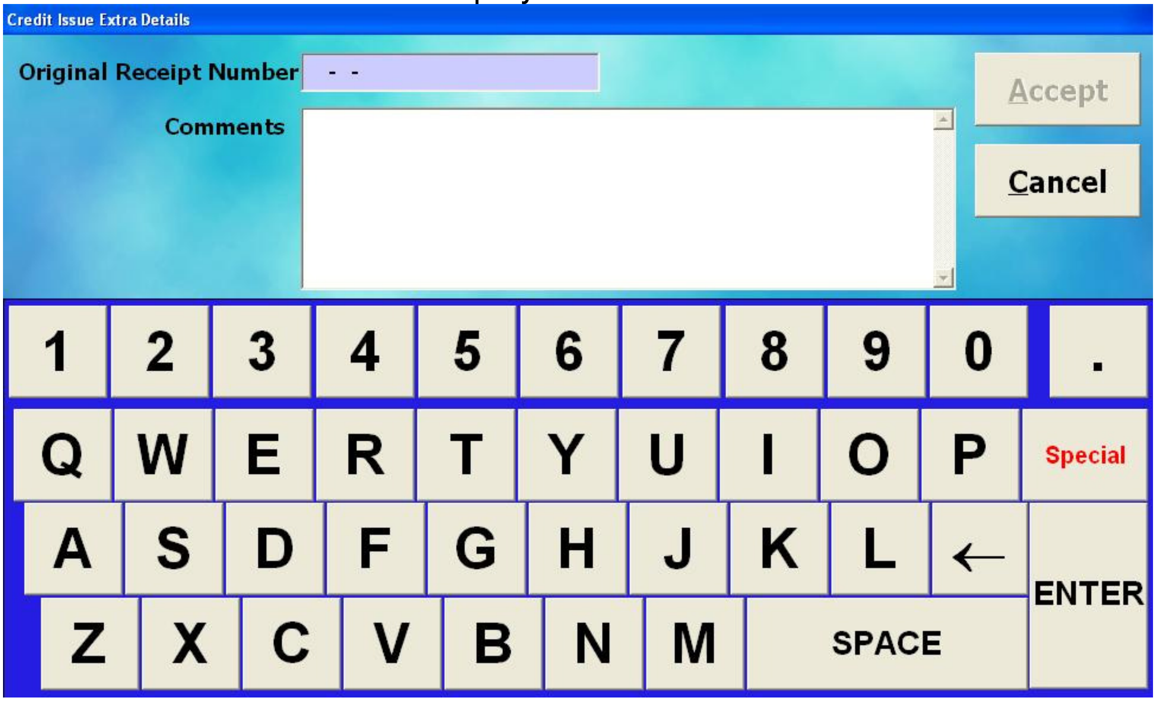
Credit Notes are a form of refund by effectively putting the person in 'credit' and issuing a receipt for the credit amount

Issuing a Credit Note

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

- Select

The Credit Issue details screen is displayed



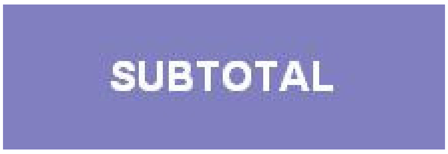
- Enter the original receipt number

- Enter Comments as required
- Select

Complete the transaction

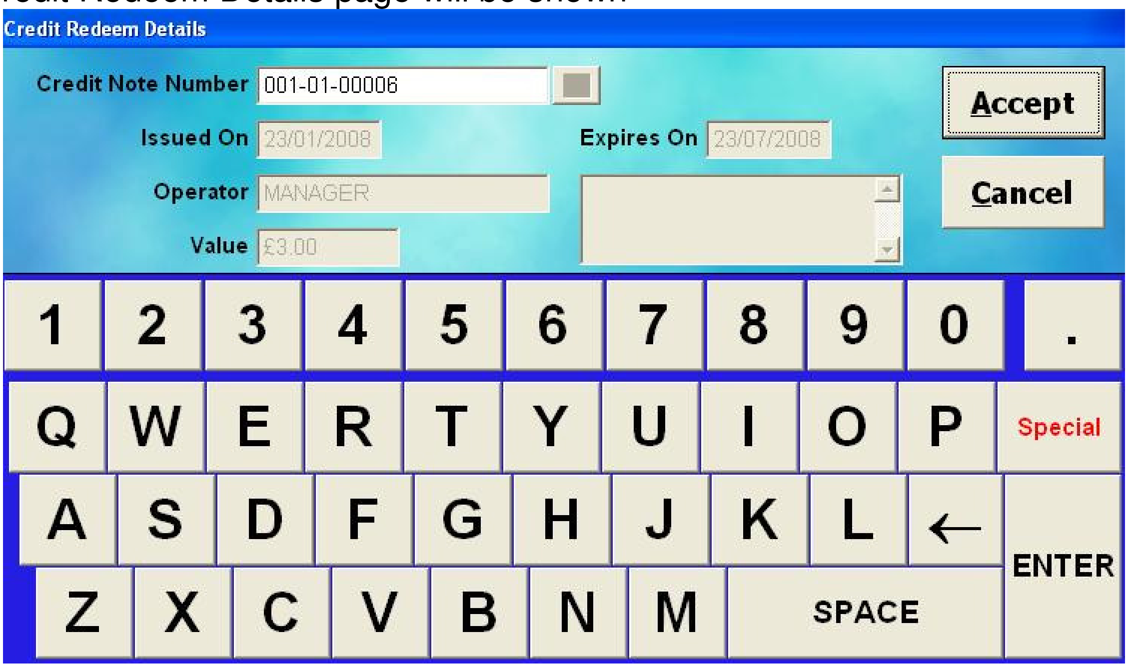
Using/Redeeming a Credit Note

- Ring through the items on the transaction
- Select



- Select

The Credit Redeem Details page will be shown



- Enter the Credit Note Number

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

- Select

Complete the transaction

	A credit note can be used as a Part Payment

Stock In/Out

Alter Stock Levels by Adjustments Only
Compulsory Stock Required
Decimal Places for Stock Quantity
Keep Stock Transaction History
Real Time Stock Updates
Warn for Stock Level below Min Stock

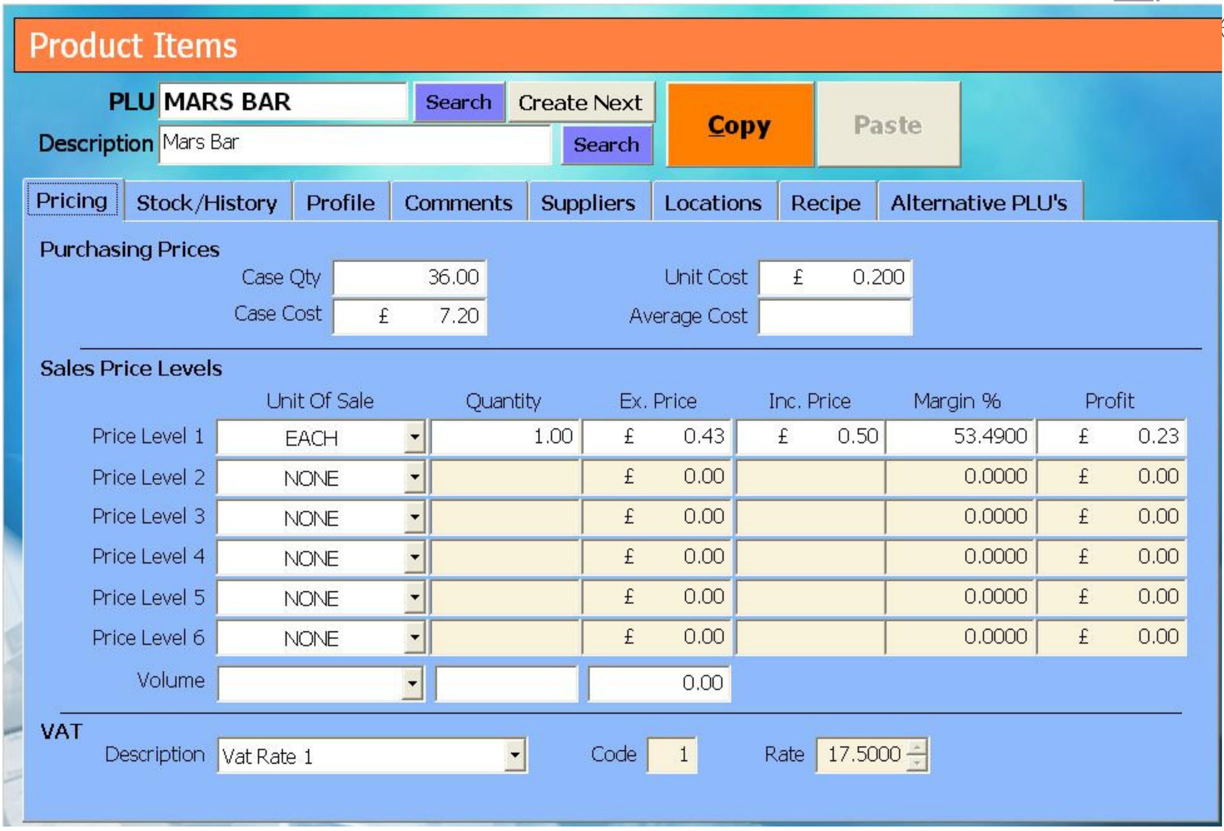
To use the stock facility the products/PLUs must be set up, this manual assumes the product exists in the database and units of sale have been created. You can enter the stock details when creating the item; the process does not have to be done separately.

Setting up a Stock item

- Select

- Select

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



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

The Unit cost will be calculated automatically

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

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

Make sure you have the correct VAT Rate applied

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

To set up a recipe item

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

You must have your products Lager and Lemonade set up as above

- Add Carlsberg Shandy as a PLU
- Select

- Select

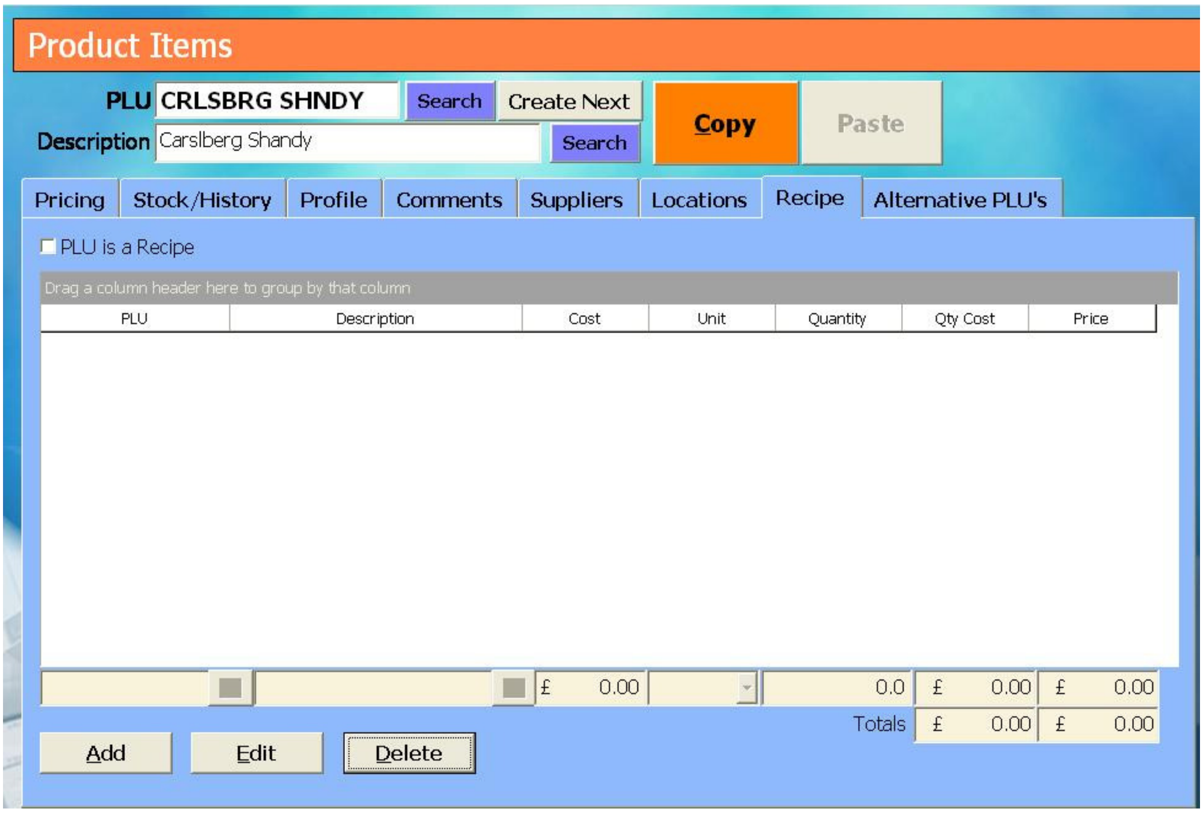
- Tick

- Select

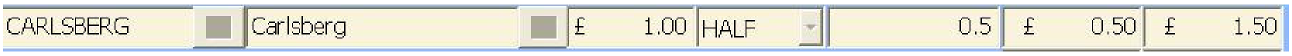
The recipe page is displayed



- Select

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

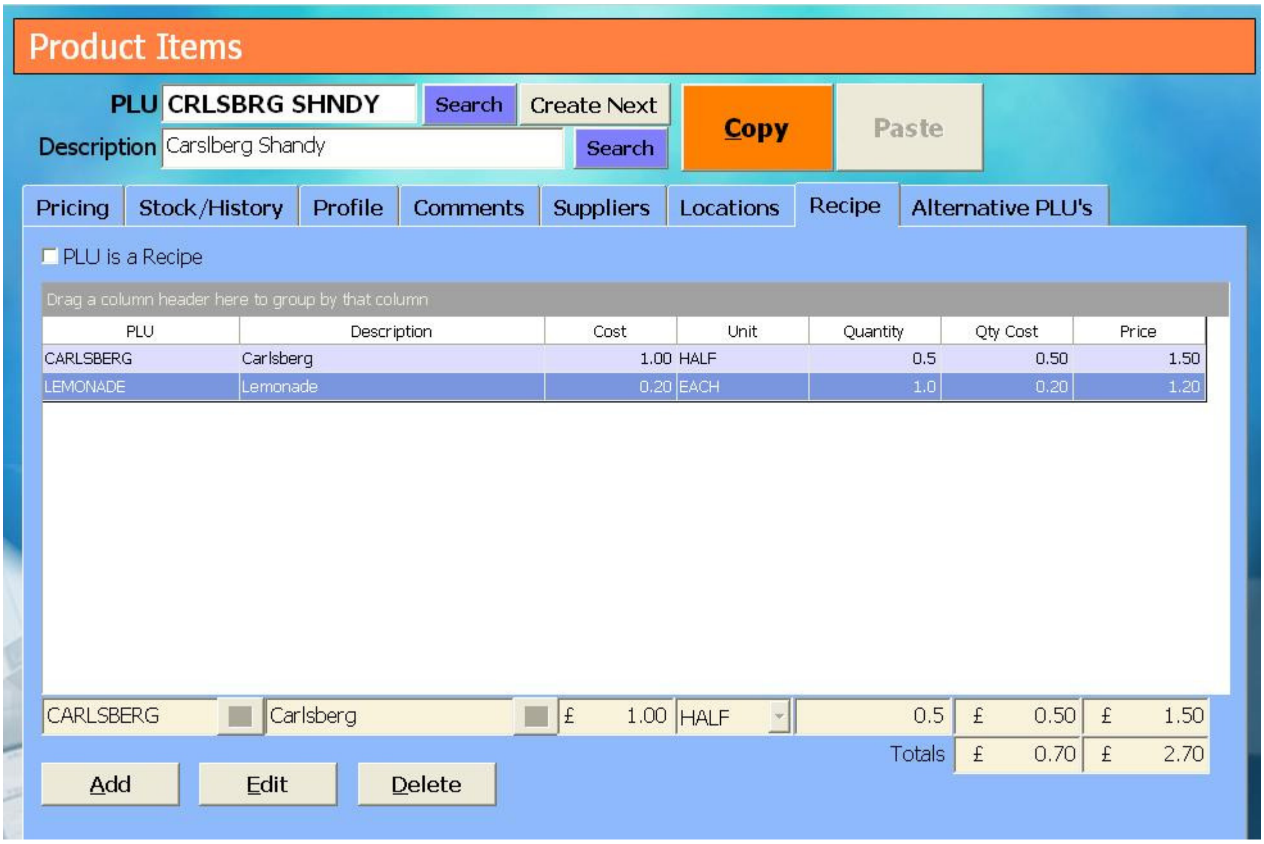


In this example I have told the system I am taking Half of Carlsberg from stock – it has calculated the cost

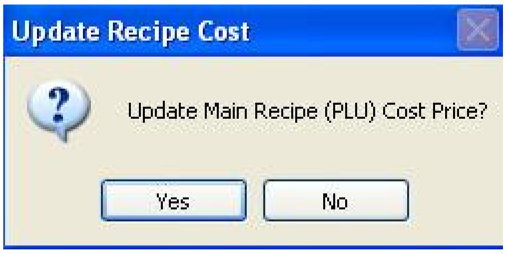
- Select

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

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



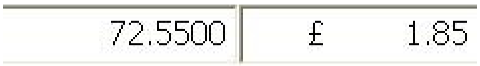
Once you have saved the PLU the following message will be displayed



- Select Yes

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

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

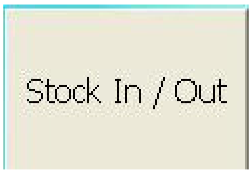


Stock Orders

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

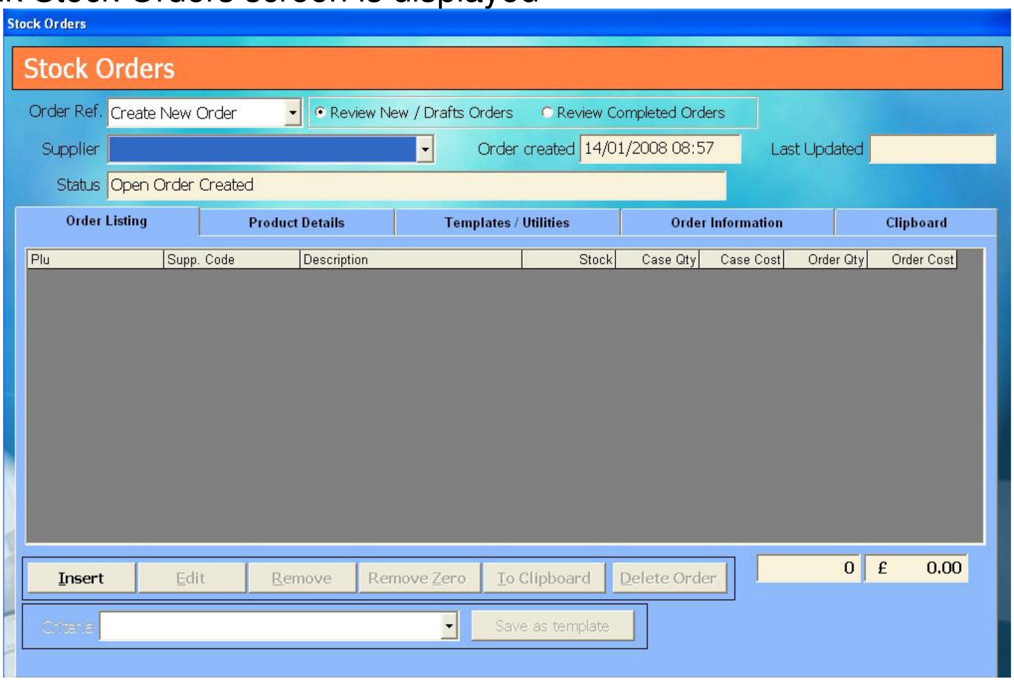
To create a new Order manually

- Select



- Select

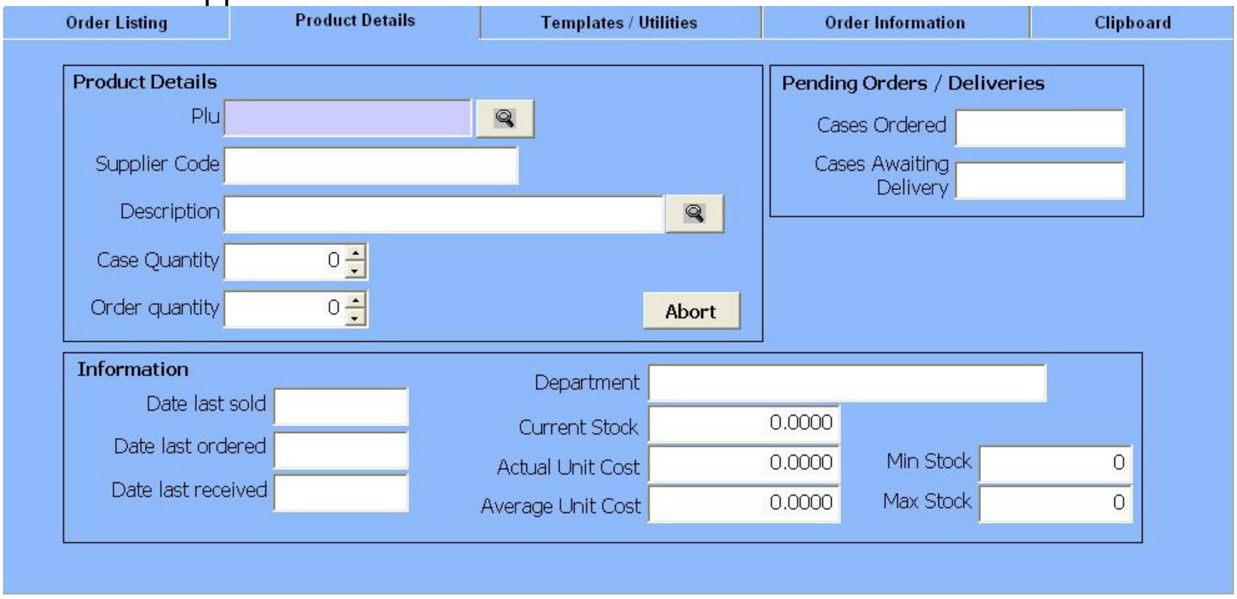
A blank Stock Orders screen is displayed



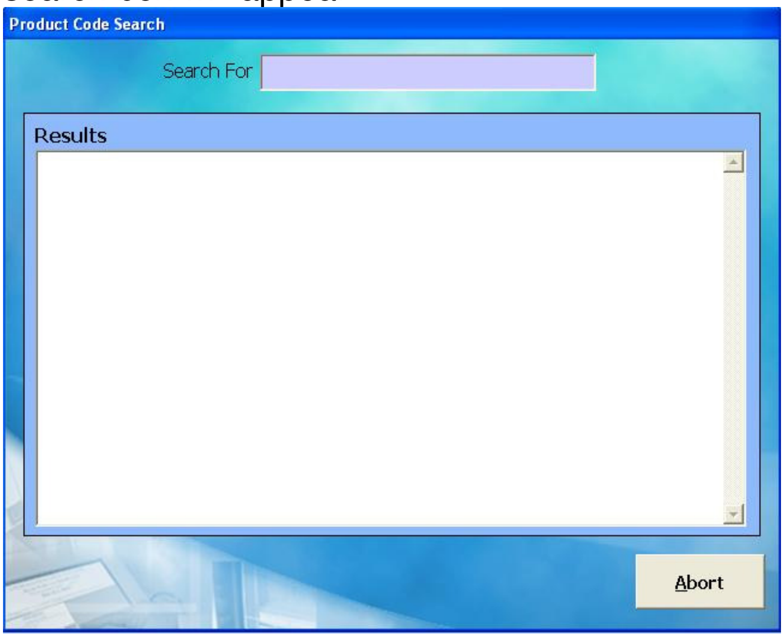
From the drop down box in the ‘Order Ref’ field select ‘Create New Order’
From the ‘Supplier’ drop down box select the supplier you are ordering the products from

- Select

A new screen will appear



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



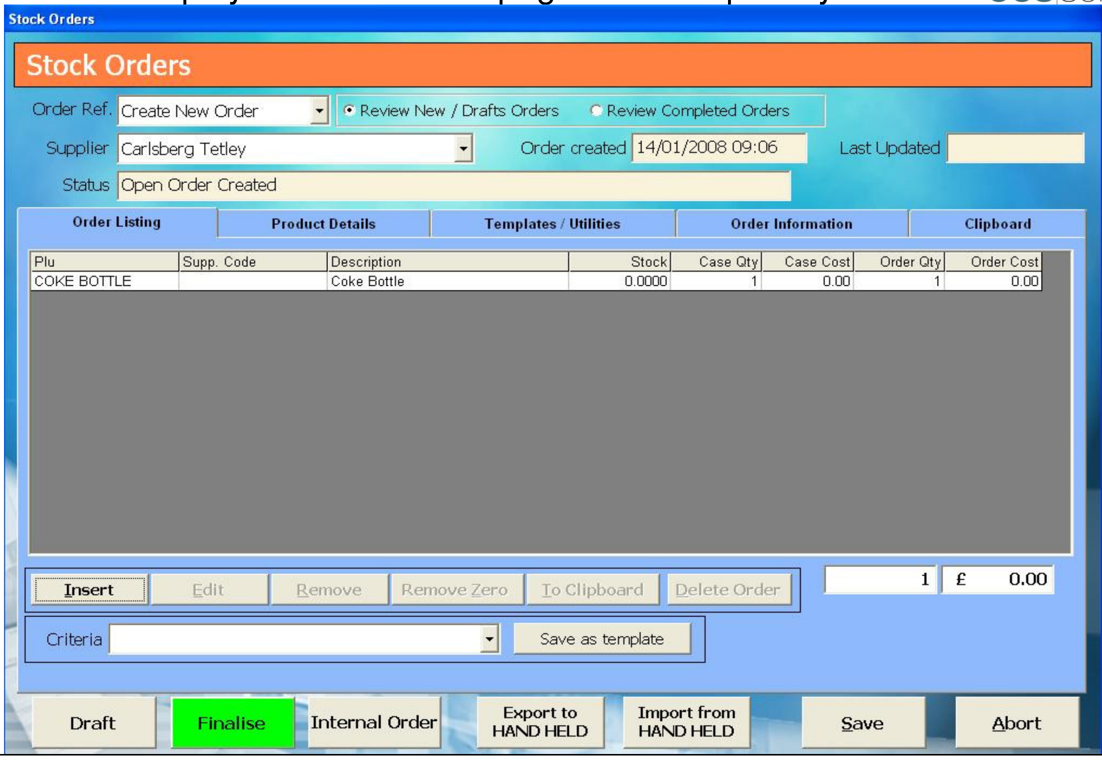
- In the Search for field enter a minimum of 1 character of the product you are searching for the search will find any product with that character in *e.g. if you enter 'o' as the search it will find 'Orange', 'Fosters' and 'Coke Bottle' as they all contain the letter 'o'*. Select 'Accept' to confirm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

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

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

- Select

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



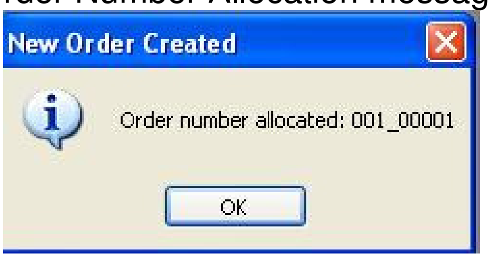
If the cost is 0.00 there is no cost price set against the product record

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

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

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

The Order Number Allocation message will appear



- Select OK

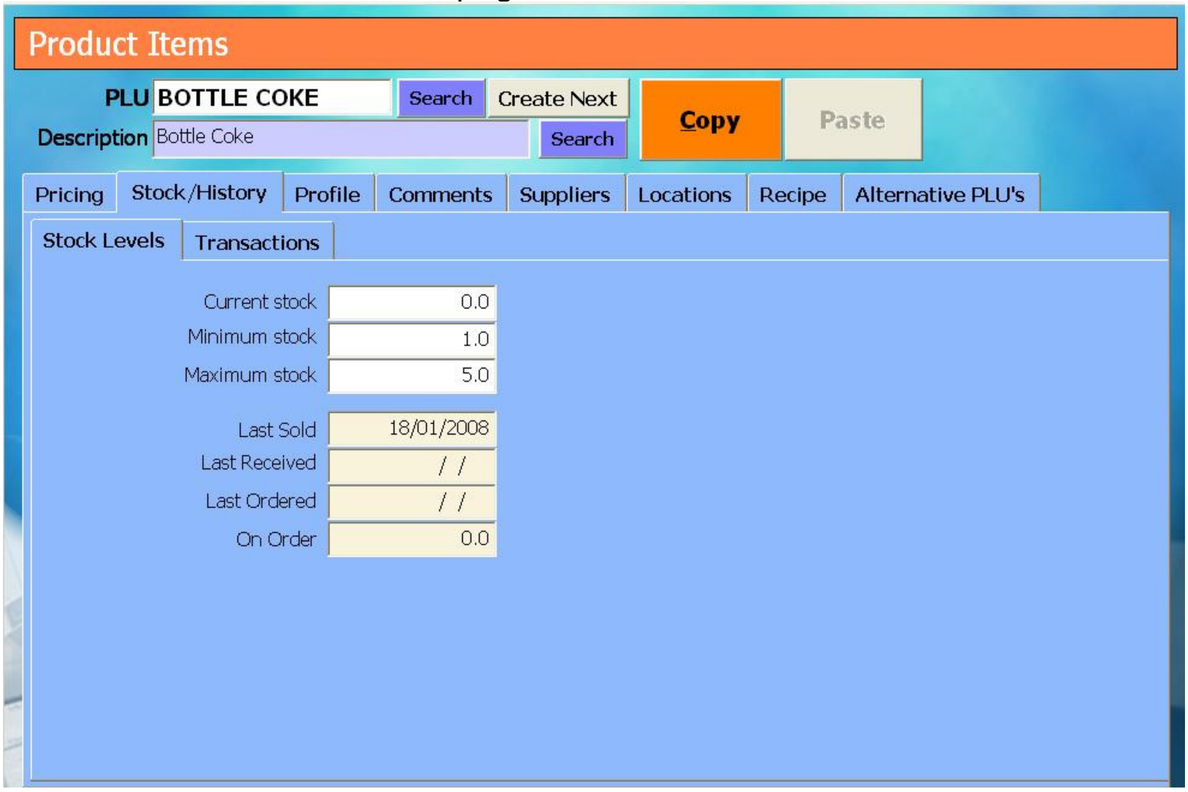
Setting a Product to use min and max criteria

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

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

- Select Stock/History

This will default to the Stock Levels page



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

☝	The Quantities are based on UNITS not CASES

To Book an Order into Stock

- Select

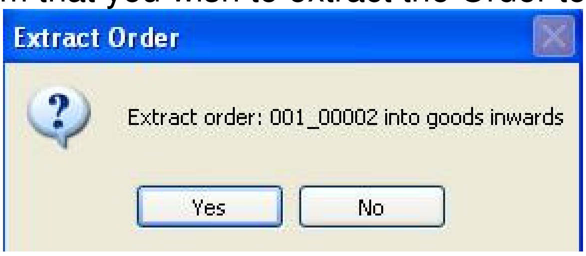
- Select

☝	The order will not appear in the Select Orders list until it has been 'Finalised'

The Select Orders screen will appear

- Highlight the Order from the list

Confirm that you wish to extract the Order to Goods Inwards

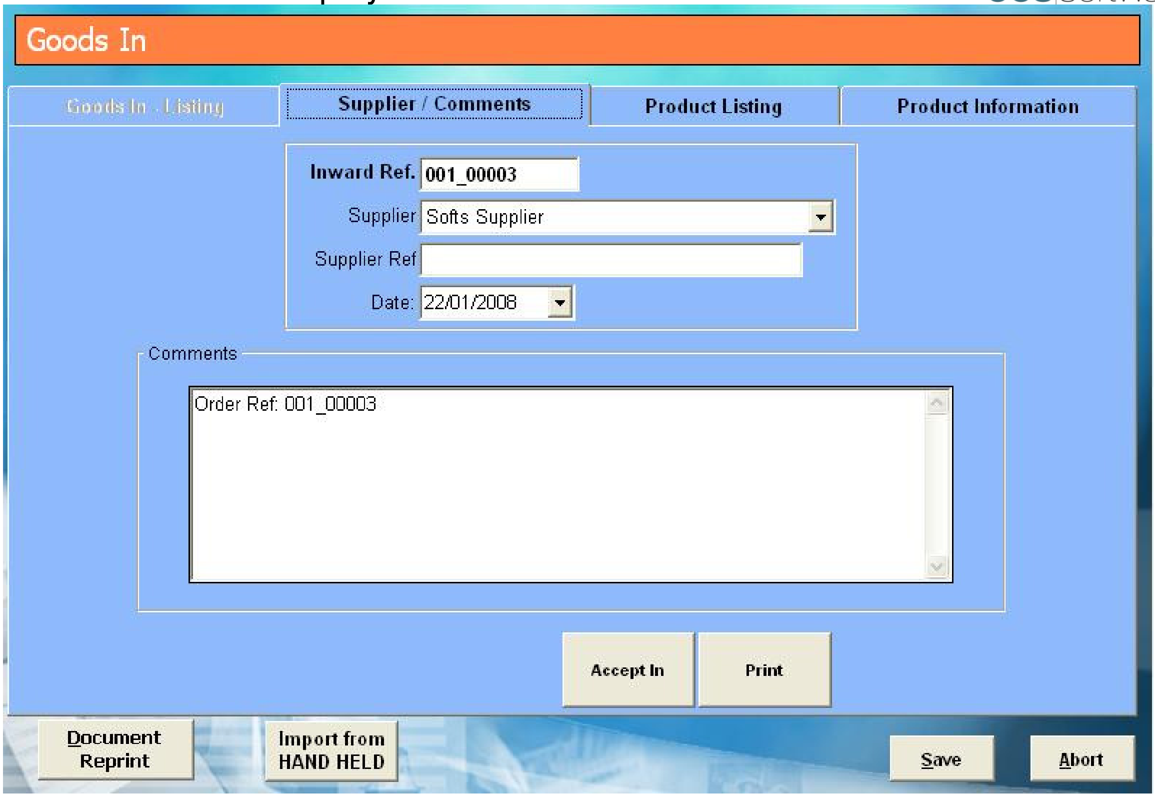


- Confirm that you wish to extract the Order to Goods Inwards

The Goods in Number allocation message is shown

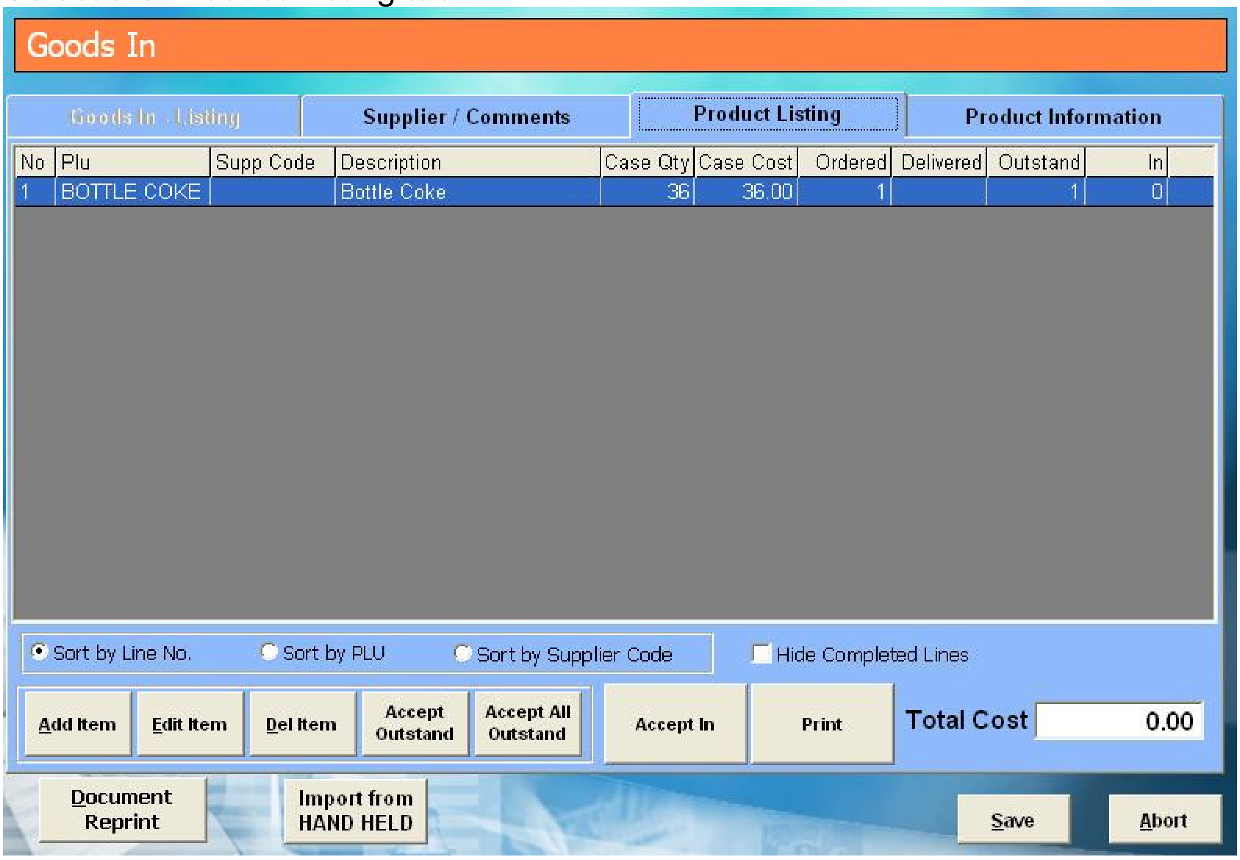
- Select OK to confirm the number

The Goods In screen is displayed



Enter the Supplier Reference number in the field if required

- Select the Product Listing tab

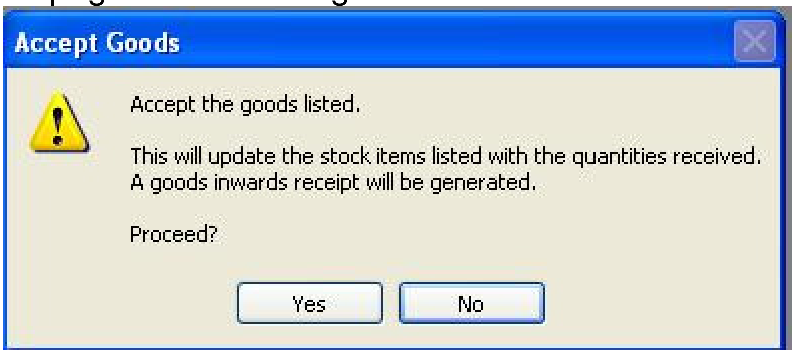


If the delivery was correct

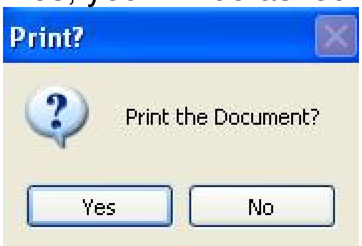
- Select

- Select

The accept goods in message will be shown



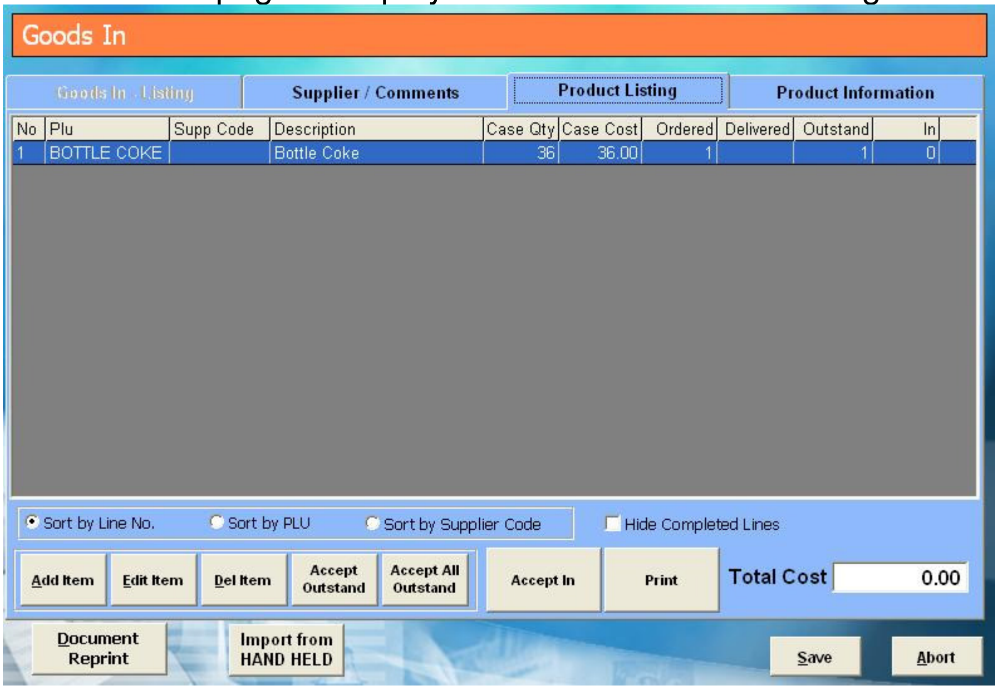
If the product and amounts were received say Yes, if not say No, assuming you select Yes, you will be asked if you want to print a goods in document



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

If the delivery Qty or Cost was incorrect

When the Goods In page is displayed select the Product Listing tab



- Double click the product which was not delivered correctly

From here you can change

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

Once you have made the required changes

- Select

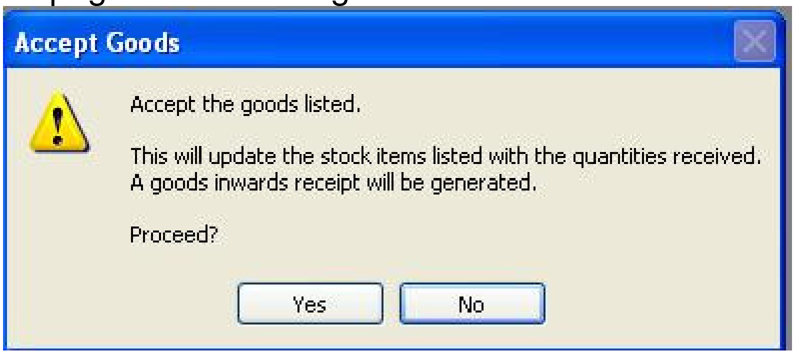
The product listing page is displayed with the changes reflected

If you do not want to save the changes made

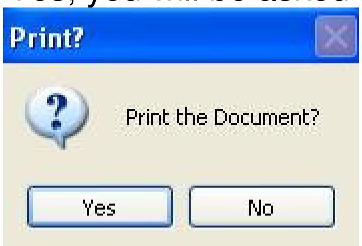
- Select

- Select

The accept goods in message will be shown



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



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

Deleting an Item

From the Product Listing page highlight the product to be deleted

- Select

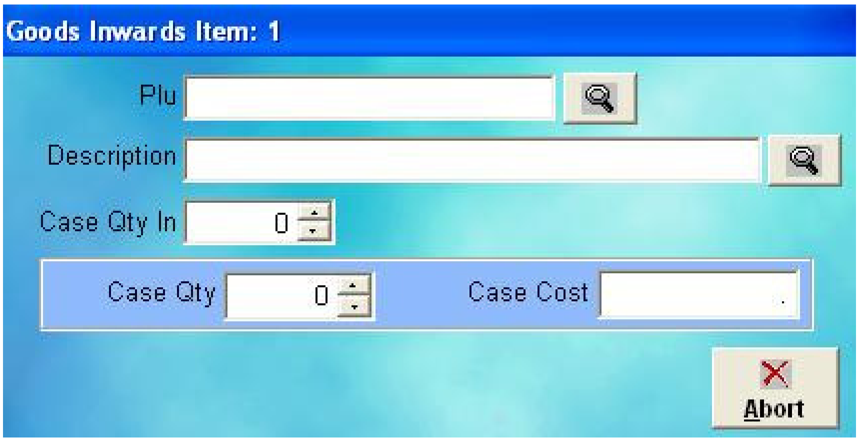
The product will be deleted from the order

Adding an Item

From the Product Listing page

- Select

The following search box is displayed



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

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

- Select

The product listing page is displayed with the new product on the delivery

Edit an Item

The edit item button gives the same option as double clicking a product

From here you can change

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

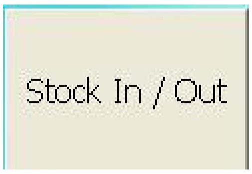
Goods In

	Allow Update of Case Quantity Field with Orders/Goods In

Goods In is used to record delivered stock from Suppliers. This is a mandatory part of the Stock In process, for the system to be able to calculate stock levels, reorder values and discrepancies it must know how many of each product has been delivered. If using in conjunction with Orders please refer to the Stock Orders section of the manual.

Creating Goods In

- Select

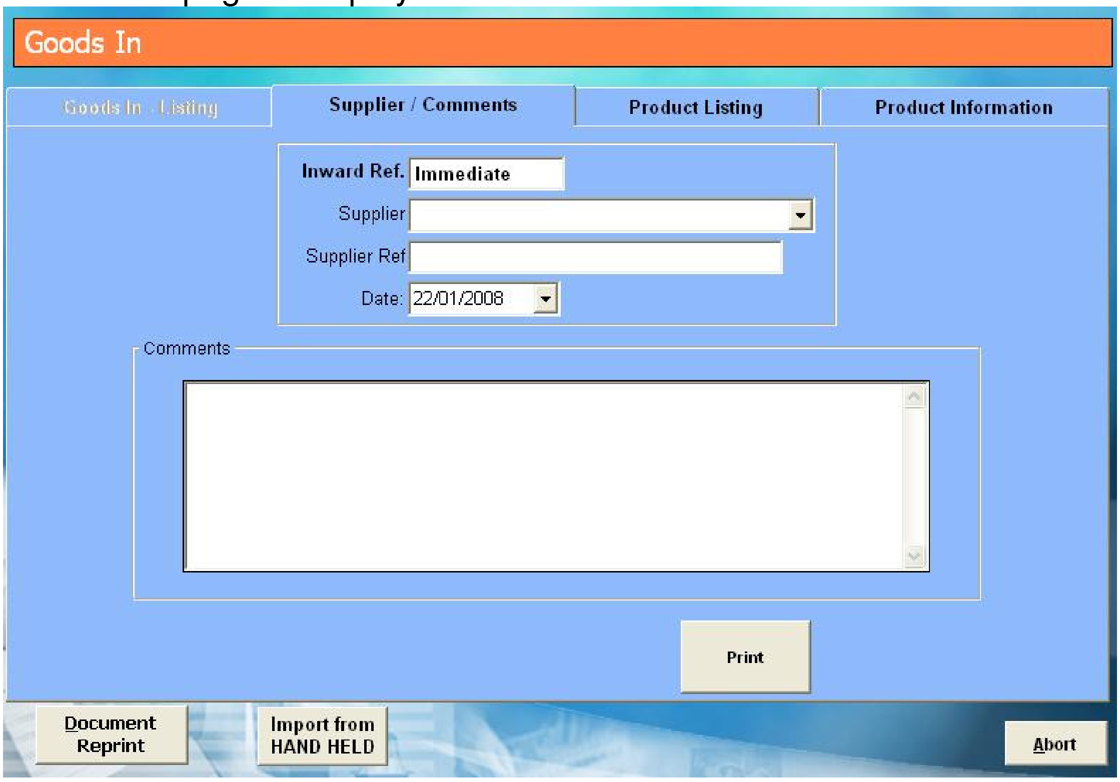


- Select

The Goods In Listing page is displayed – this shows any outstanding deliveries to be accepted in

- Select

A blank Goods In page is displayed

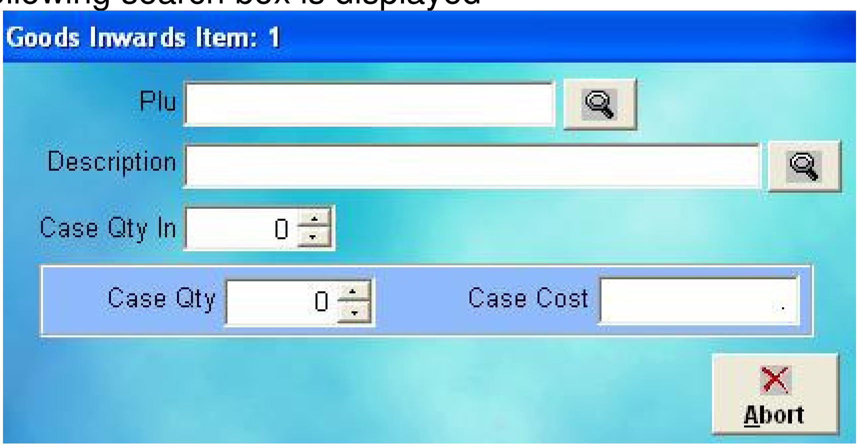


- Select the Supplier from the Supplier drop down box
- Enter the supplier ref if required (this may be the delivery note number)
- Select the date of delivery
- Add any comments in the comments box

Select the Product Listing page this will be blank

- Select

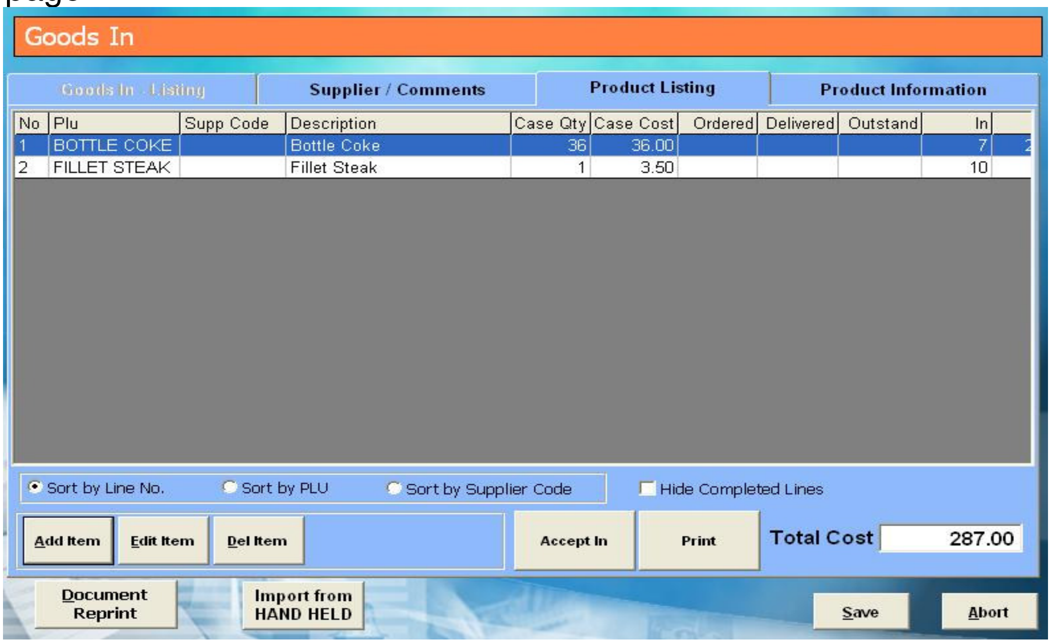
The following search box is displayed



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

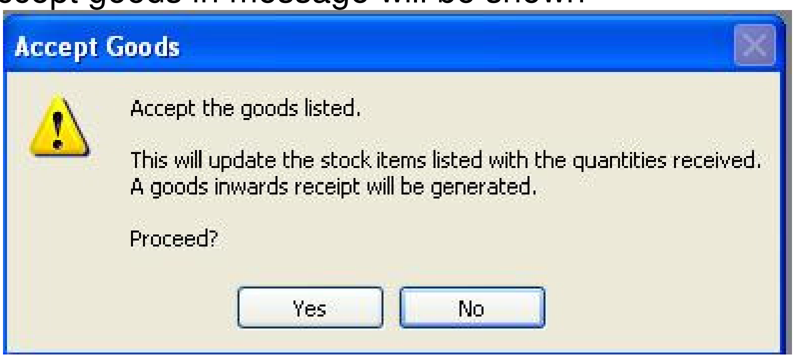
- Select

The product listing page is displayed with the new product on the delivery
Repeat the process until all products from the supplier have been added to the listing page



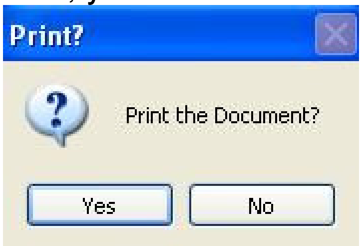
- Select

The accept goods in message will be shown



The Goods In number allocation message will be shown

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

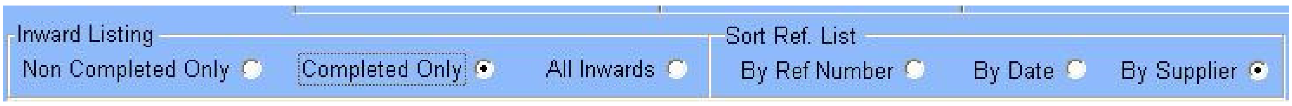


If you select Yes the document will print if No is selected the Goods In Listing page will be shown

Goods In Page

The Goods In page can be viewed by choosing criteria to display

The default display is Non Completed Only; however you can change this by using the radio buttons



From the radio buttons you can narrow down the selection to:

- Completed Only = shows only completed Goods In
- All Inwards = shows Non Completed and Completed

You can sort the list by:

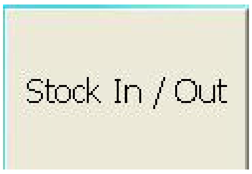
- Reference Number
- Date (received)
- Supplier

Stock Taking

Stock Taking is the procedure which allows you to manage your Stock.

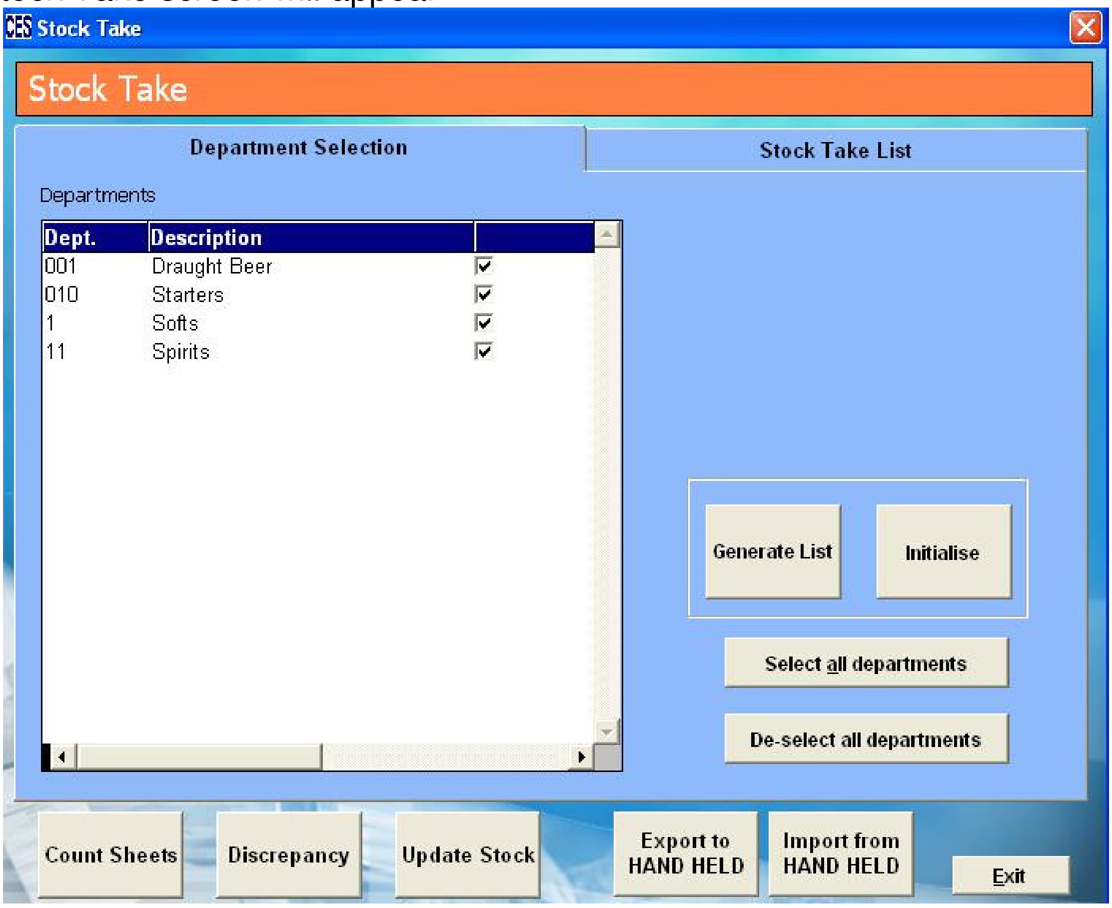
Doing a Stock Take

- Select



- Select

The Stock Take screen will appear

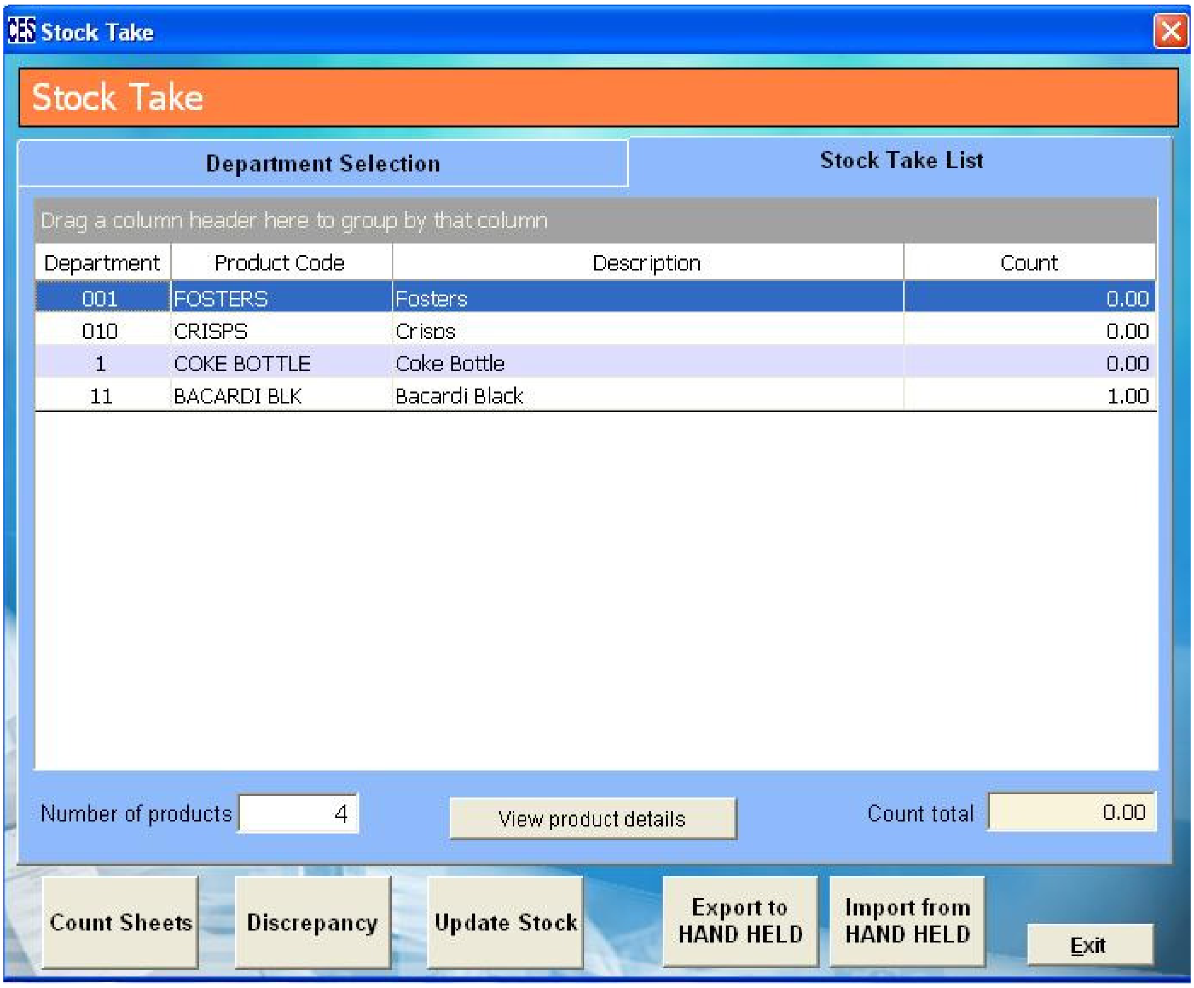


Select the Departments you want to include in your count

	If you have created a new Department and it is not showing in the Department Selection list press the initialise button, this will read through any new departments

- Select

The Stock Take List page is displayed – this lists all of the products in the selected departments to be counted

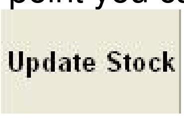


Once you have created the list you can then print a Count Sheet, to do this select

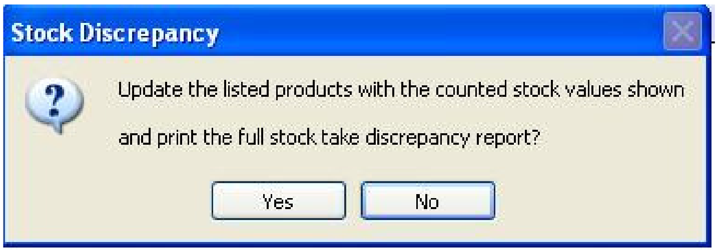
To input your results in the count column enter the totals

To print a Discrepancy report select

At this point you can change the count declaration once the



Button has been selected and you have said Yes to



The stock take figures are saved and the product records updated accordingly.

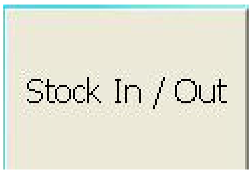
Stock Adjustments

Alter stock levels by adjustments only

Stock Adjustments are used to correct the Stock holding quantity when it has not been affected through Sales or Deliveries.

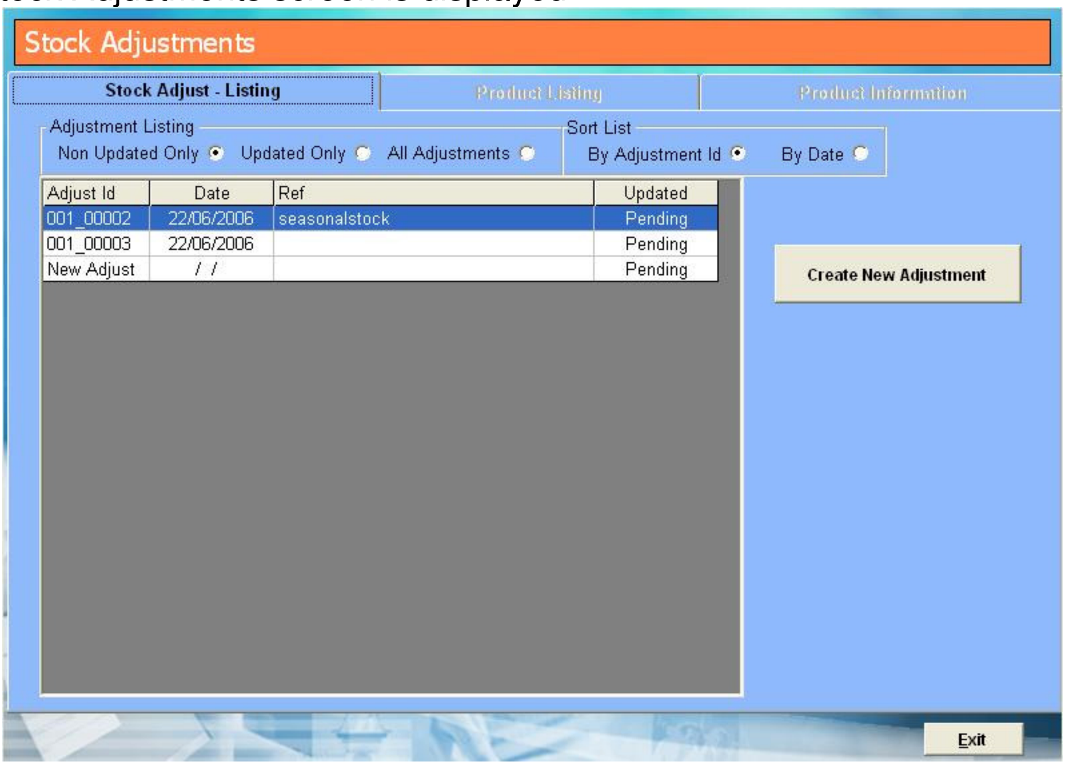
To create a new adjustment

- Select



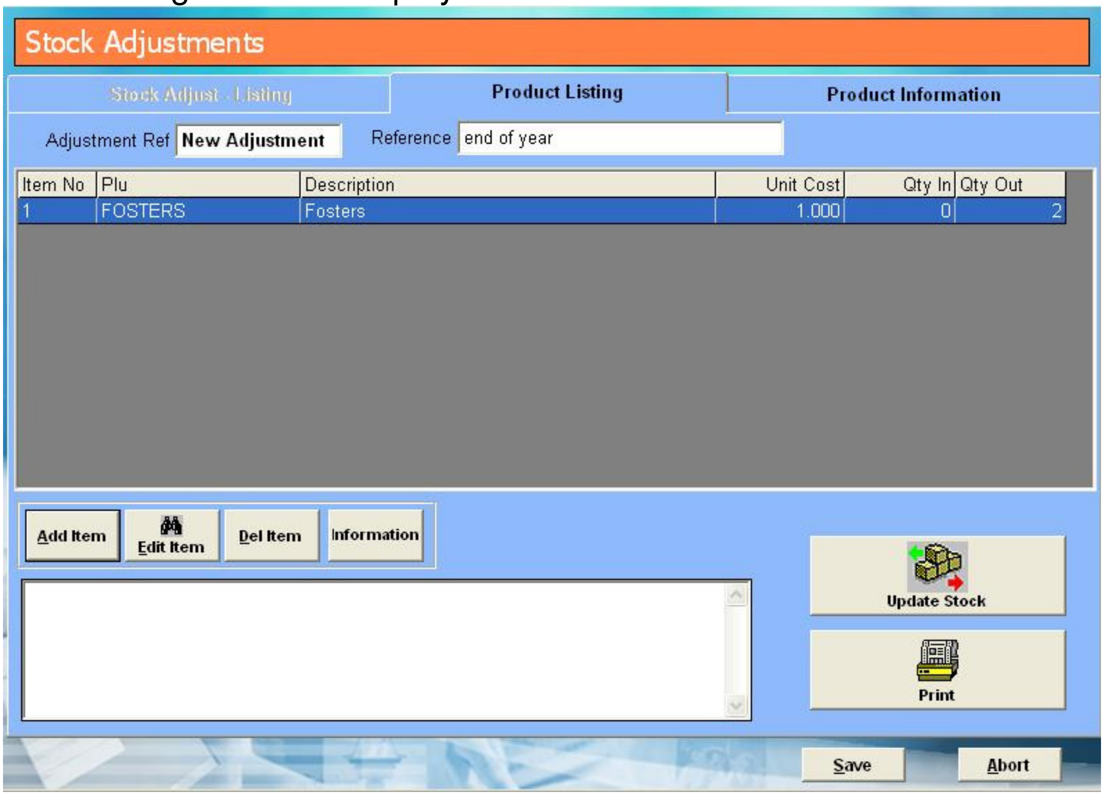
- Select

The Stock Adjustments screen is displayed



- Select

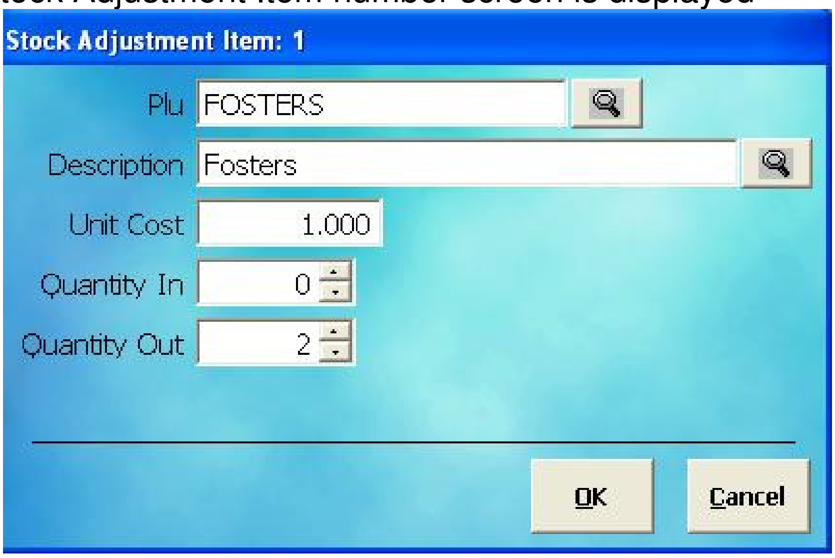
The product listing screen is displayed



In the Reference field enter the reference number or comment for the adjustment being done

- Select

The Stock Adjustment Item number screen is displayed



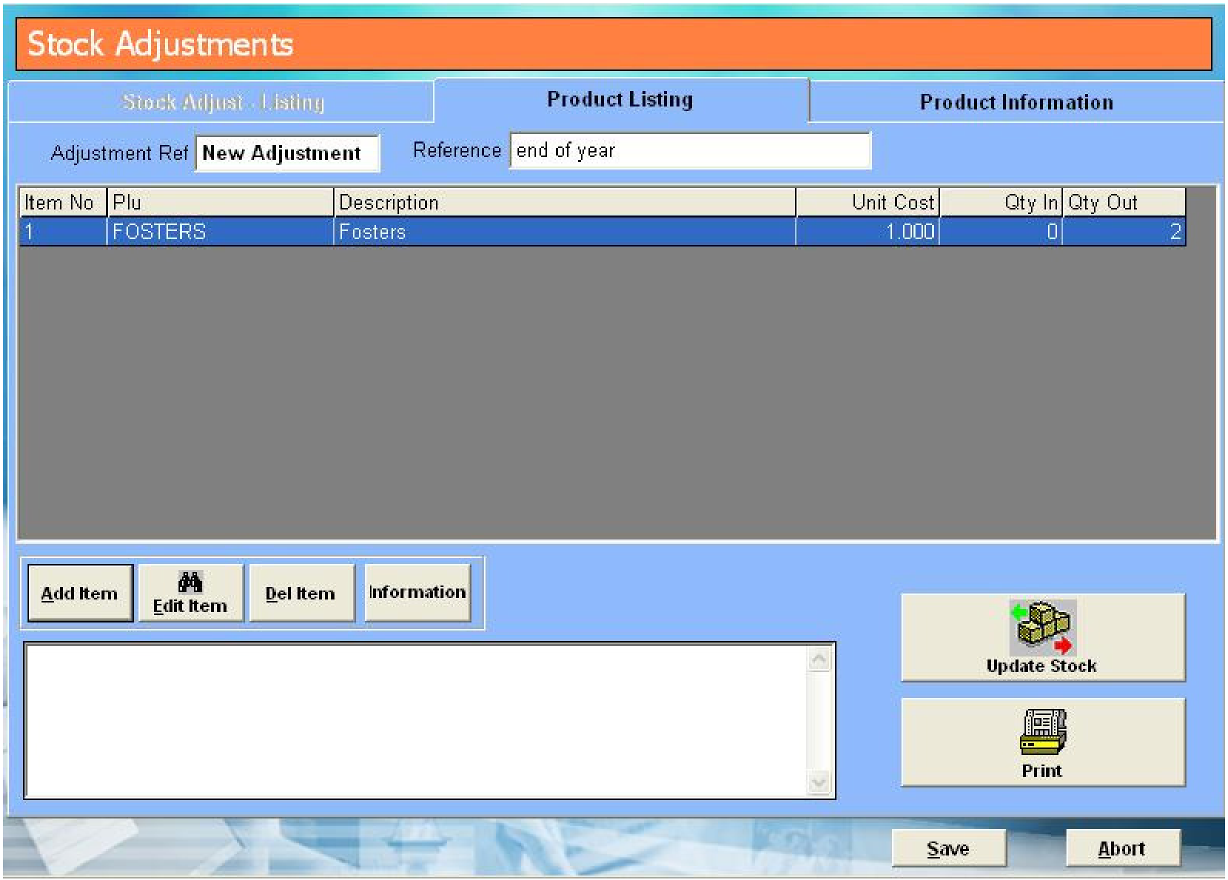
Enter the PLU or description or use the search if you do not know the full PLU or description

☝	The unit cost is read through from the product record so it s important to keep this updated

If the stock level is increasing enter the number in the Quantity In field
If the Stock Level has decreased enter the number leaving stock in the Quantity Out field

- Select OK

The product will appear in the Stock Adjustments screen



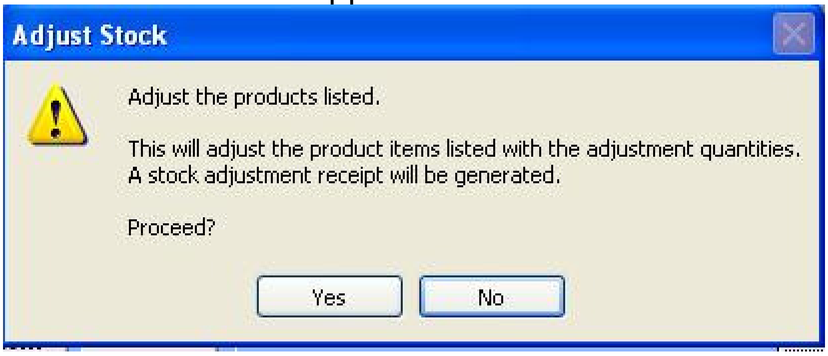
To add more items to the adjustment

- Select

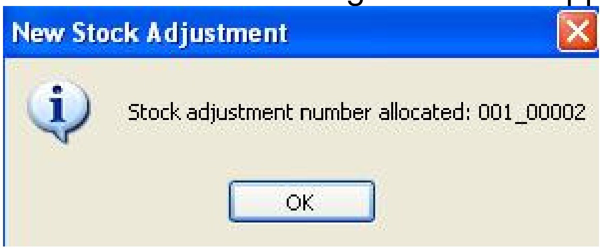
Repeat the process until you have all the adjustments you want to make recorded

- Select

A confirmation screen will appear



If you are sure and want to proceed press Yes if not press No
If yes is selected the following screen will appear

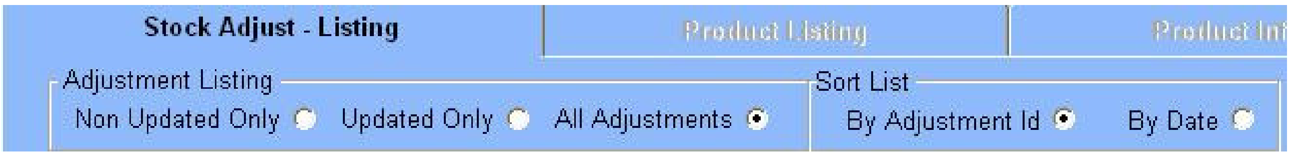


- Select OK

You will be asked if you would like to print the document for your records answer Yes or No
You will be returned to the Stock Adjustments screen

Stock Adjustments Screen

The Stock Adjustments page can be viewed by choosing criteria to display



The default display is Non Updated Only; however you can change this by using the radio buttons
From the radio buttons you can narrow down the selection to:

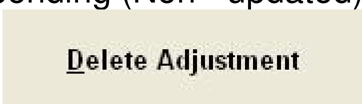
- Updated Only = shows only Updated Adjustments
- All Adjustments = shows Non Updated and Updated

You can sort the list by:

- Adjustment ID
- Date

The buttons down the side of the page will change depending on the status of the highlighted entry, if the entry is pending (Non - updated) you will see:

and



If the entry is Updated you will see:

and

Edit an Adjustment

Highlight the adjustment to be edited

- Select

You can either add an item to the adjustment by selecting

Or you can edit an item on the adjustment by highlighting the item and selecting

Or by double clicking on the item line

From here you can

- Change the cost price
- Change the number In
- Change the number Out

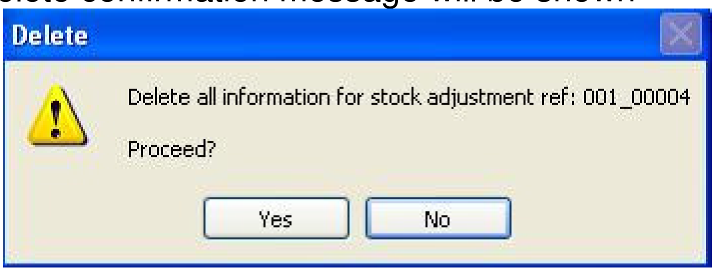
	You can only edit an adjustment if it is pending

Delete an Adjustment

Highlight the adjustment to be deleted

- Select

The delete confirmation message will be shown



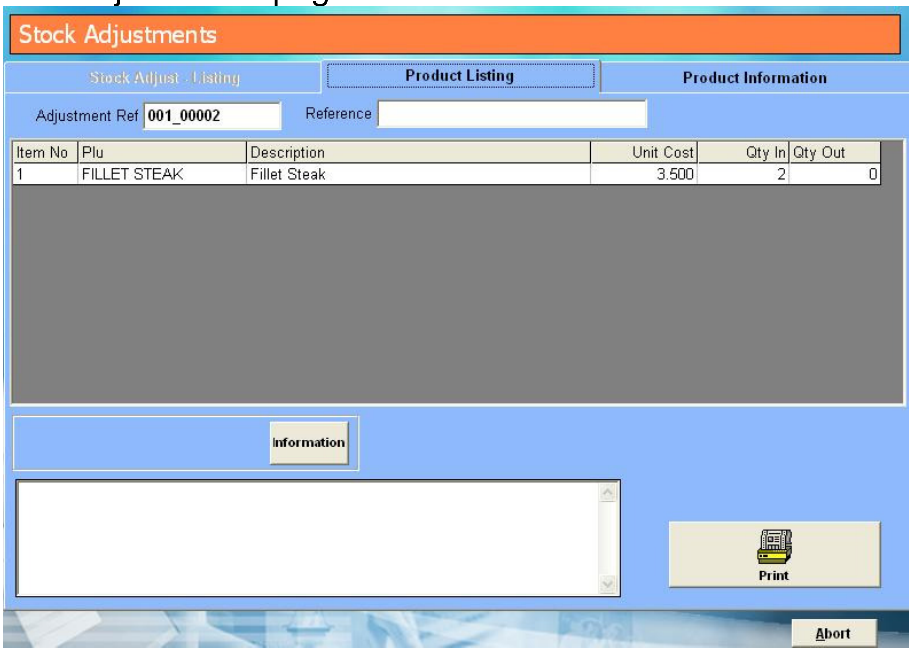
If you want to delete the adjustment press OK, if not press No.

View an Adjustment

Highlight the adjustment you want to view

- Select

The Stock Adjustments page will be shown



☝	You can print the document at any time when you see this icon 

Back Office

Customers

	Allow Create Customer within Sale Mode
	Ask for Customer at Start of New Booking?
	Customer Detail Required for Credit Notes
	Enable expiry date on Customer Database
	Loyalty Points With Customers
	Main Search On Customer
	Orders Use Accounts/Customers
	Prompt for Customer
	Prompt for Customer Group When Adding New Customer

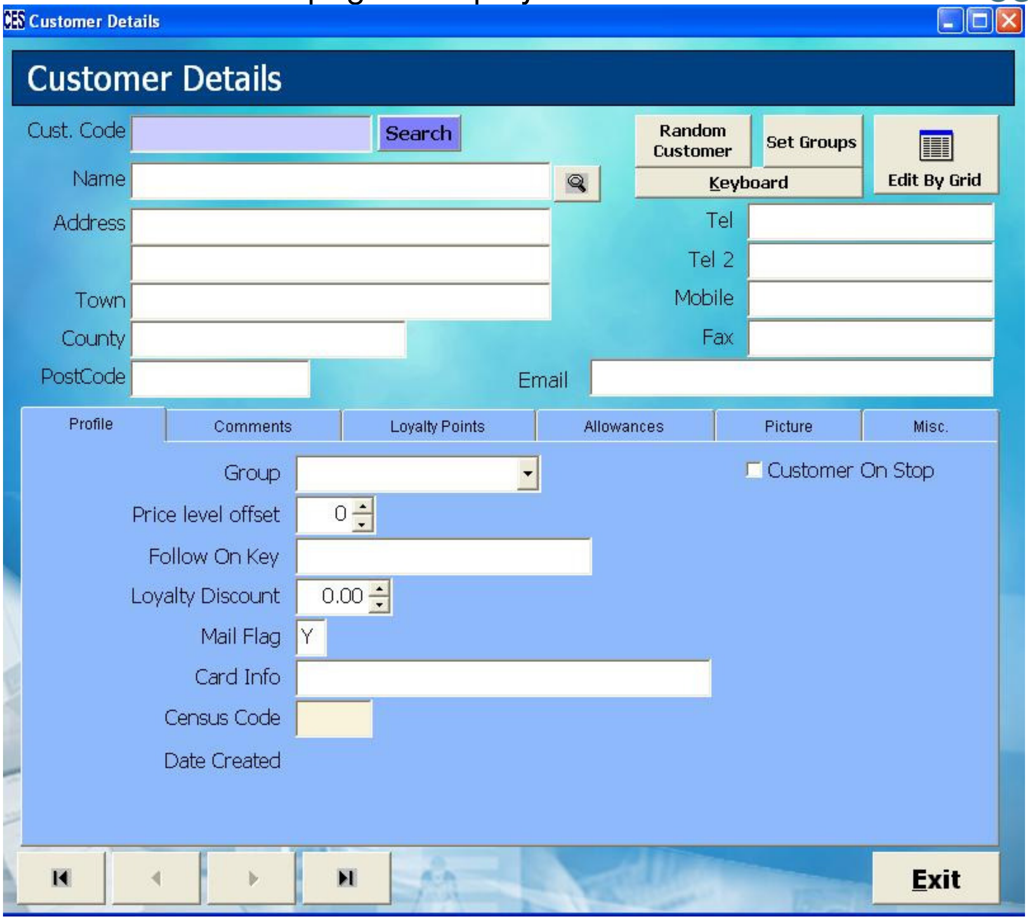
Customer is a module to manage customers; it can be used with or without loyalty and is also used in conjunction with orders

Creating a New Customer

- Select

- Select

A blank Customer Details page is displayed



- Enter the customer code

☝	The customer code is a unique ID associated with the customer – decide on a coding system before you start to create customers

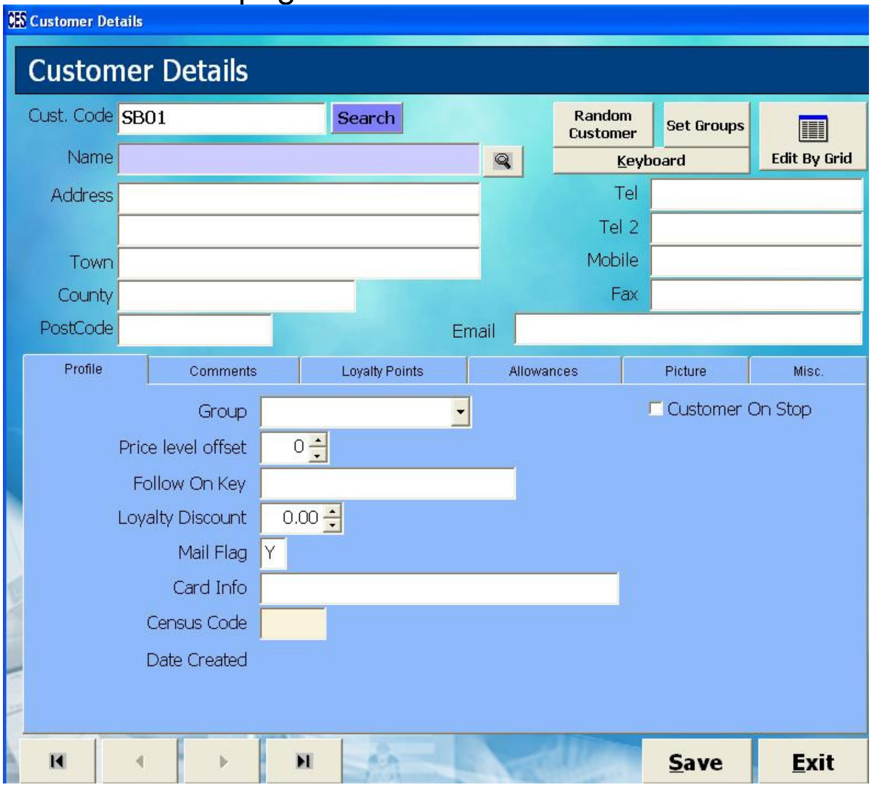
☝	The customer code has a maximum of 20 characters and can be alphanumeric

- Select Enter

If the Customer exists you will be taken to that record if not you will be asked if you want to create a new one

- Select Yes

The customer details page is enabled



- Enter the full name in the name field

☝	The customer name is the only mandatory information for creating a customer; you can fill in address and telephone number details as required

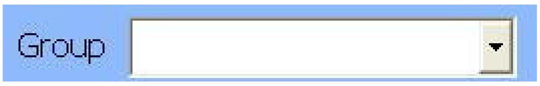
Adding a Customer to a Group

- Select

Identify the customer by using the customer code or name

- From the drop down list next to Group select the Group you want the customer to belong to

☝	To add a new Group see the Groups section of the manual or you can add a new group from the customer record by selecting the ‘Set Groups’ button

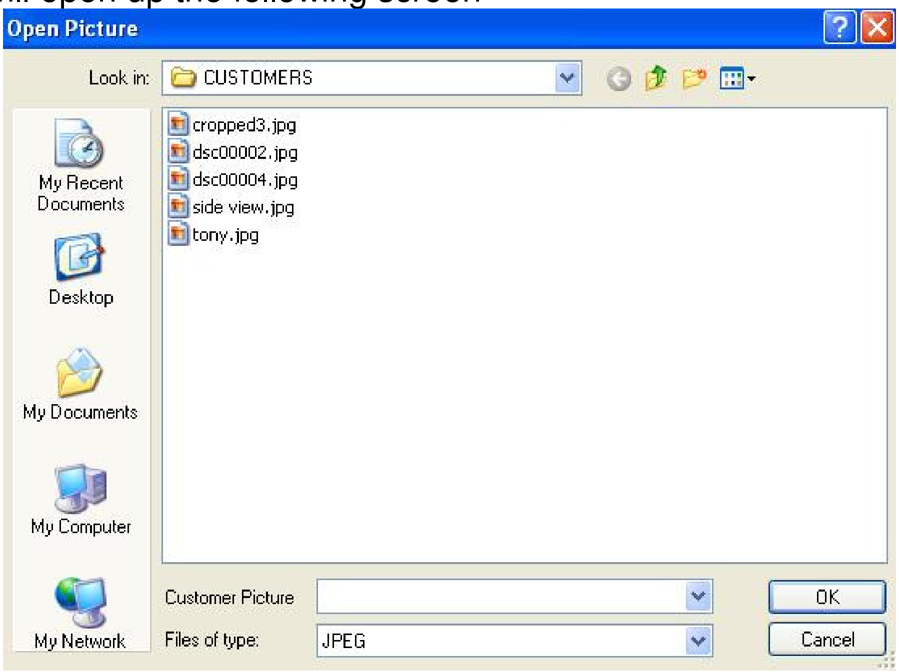


Attaching a Picture

- Identify the customer
- Select

- Select

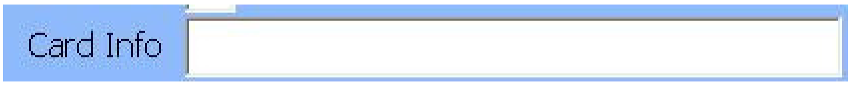
This will open up the following screen



- Double click on the picture you want to attach

Allocating a Swipe Card

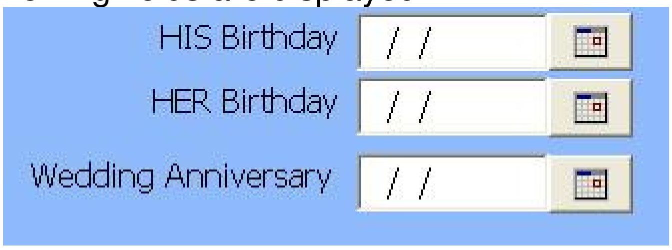
- Identify the customer
- In the Card Info field enter the card number



Entering Birthdays and Anniversaries

- Identify the customer
- Select

The following fields are displayed



- Enter the required information

Putting a Customer 'On Stop'

- Identify the customer
- Select

- Tick

	Putting a customer on stop will prevent the customer being identified on the terminal therefore no sales or orders may be attributed to the person while this status is on

Adding Comments

- Identify the customer
- Select

The comments field is a free entry field to add notes you may require

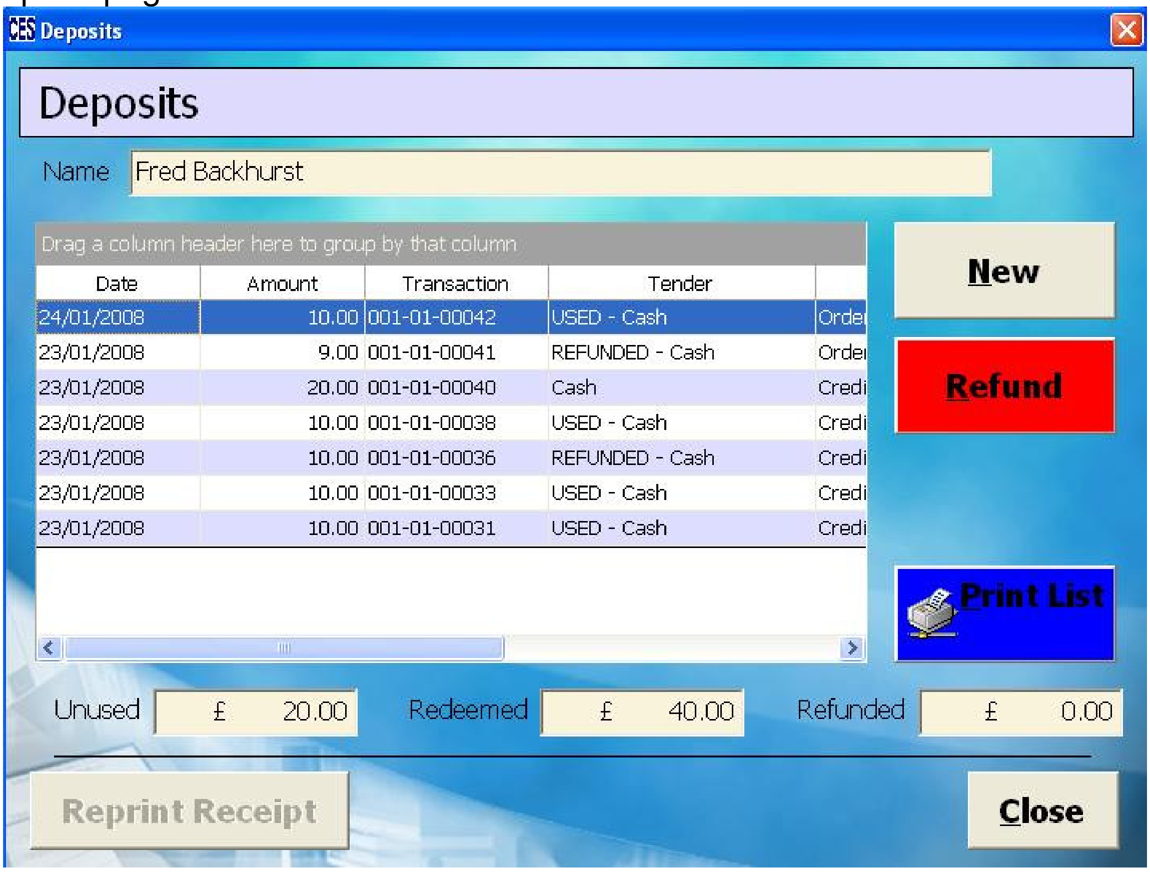
	The comments may be viewed in Sales Mode

View Deposit History

- Select

- Select

The Deposit page is shown



From this page you can

- Add a New deposit
- Refund a Deposit
- Print a list of Deposits
- Reprint a Deposit Receipt

	For more information please see Deposits section of the manual

Transaction Overview

- Select

On this page you will see the overview

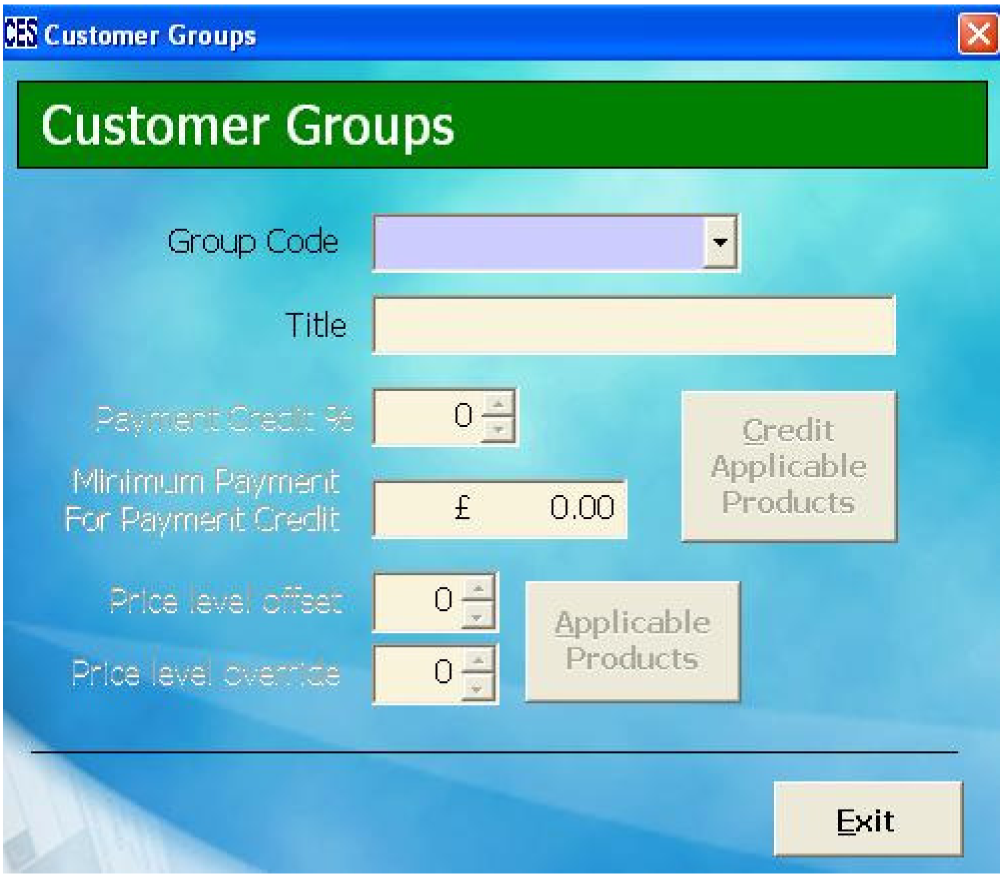
Customer Groups

Adding a New Group

- Select

- Select

The customer groups page is displayed



- Enter the Group Code

☝	Group Code is a unique ID for the group you are creating – it is an alphanumeric field and can have a maximum of 20 characters

If the code already exists you will be taken to the record if not you will be asked if you want to create a new one

- Select Yes

Enter the full title of the Group in the title field

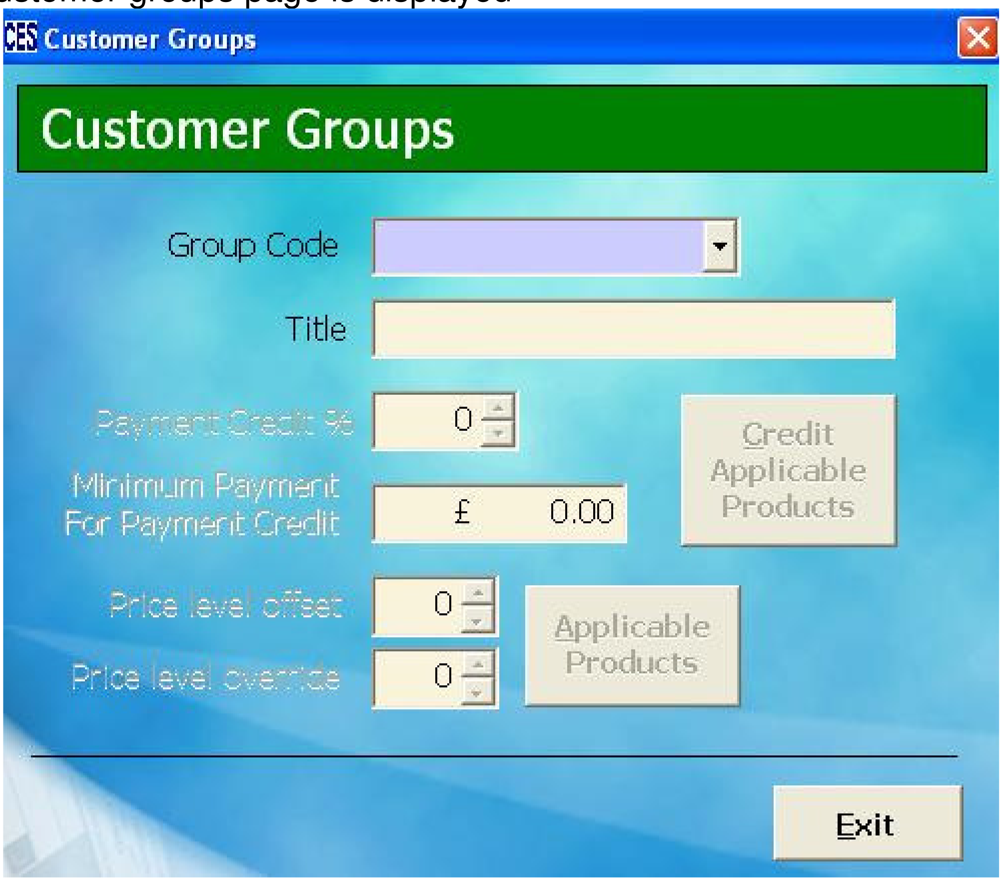
- Select

Deleting a Group

- Select

- Select

The customer groups page is displayed



Enter the Group Code or use the drop down box to select the Group you want to delete

- Select

You will be asked to confirm that you want to delete the selected Group

- Select Yes

☝	Deleting a Group automatically removes it from the Customer record – you do not get any warning about this

Customer Orders

Create a New Order

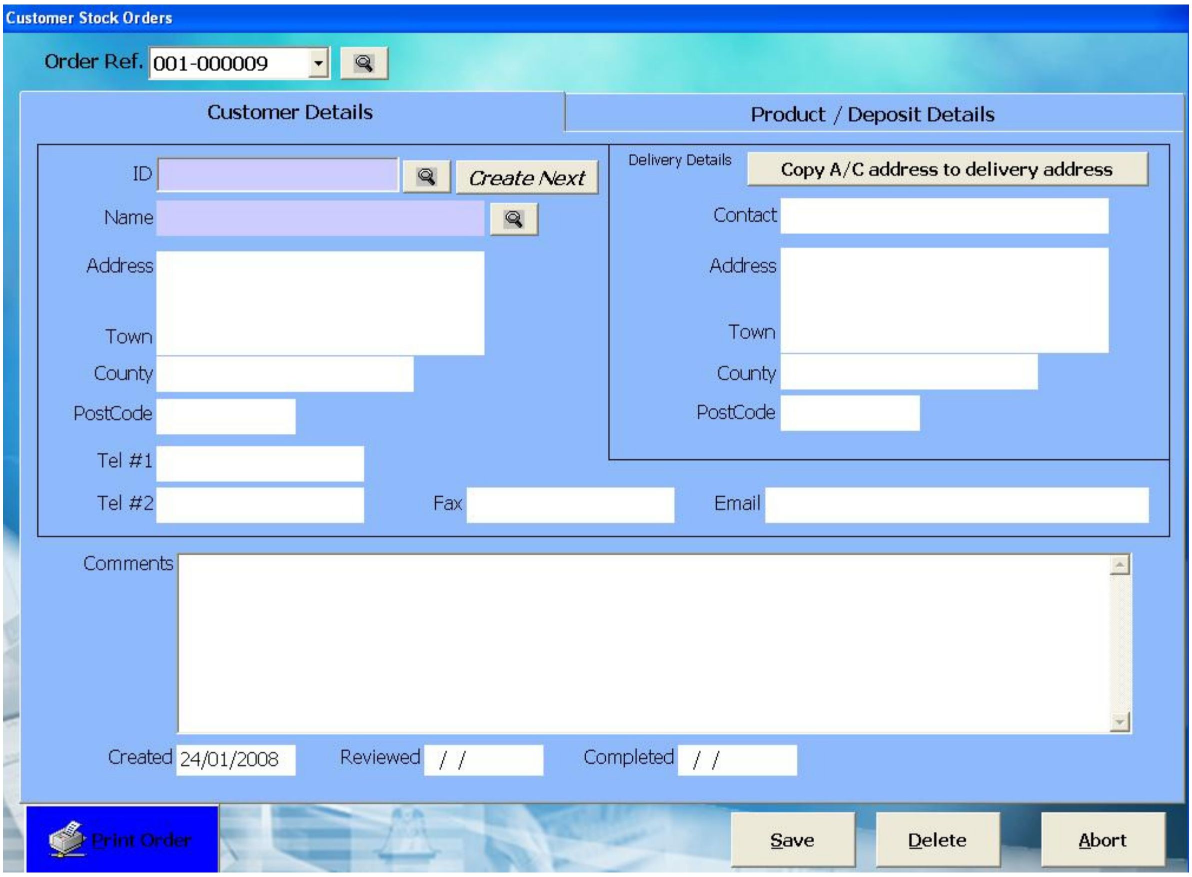
- Select

- Select

You will be asked to confirm the creation of a new order

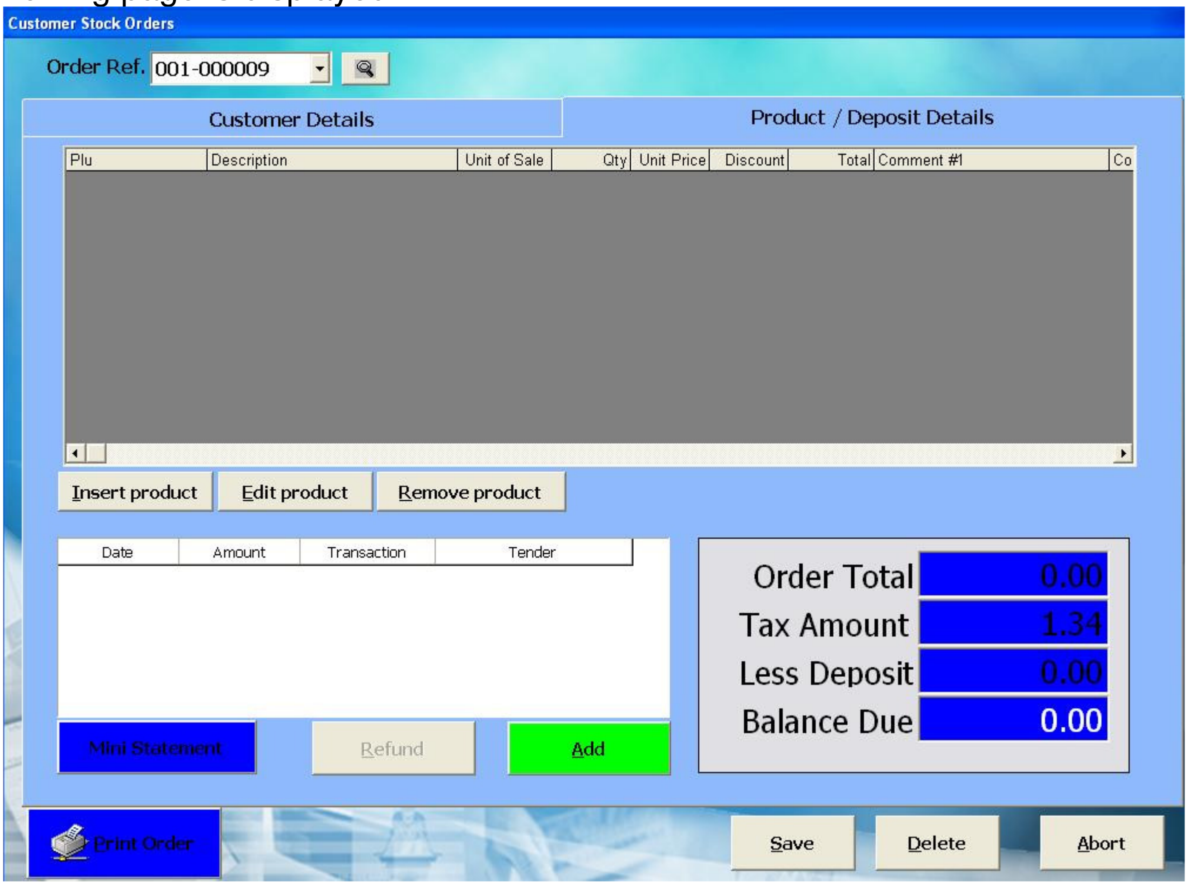
- Select Yes

The Customer Stock Order Screen is displayed



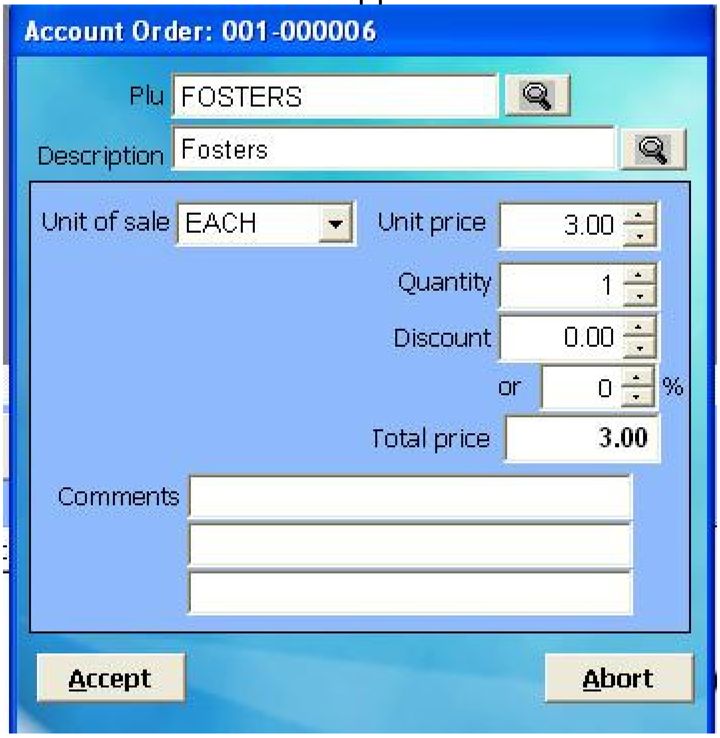
- Identify the customer
- Select

The following page is displayed



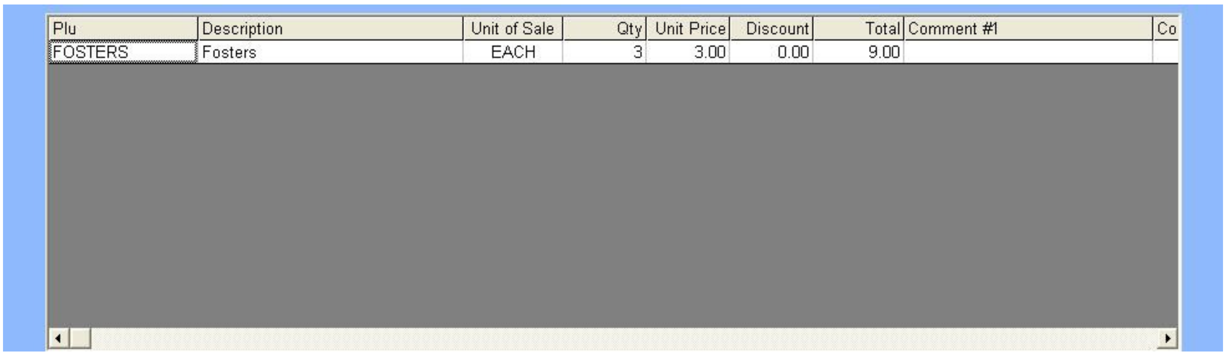
- Select

The product search box will appear



- Enter the PLU or description
- Select the quantity
- Enter any discount to be applied in either amount or %
- Enter any comments in the free text field
- Select

The customer order screen is displayed with the selected product line entered



Repeat the process until all the required products are on the order
To save the order

- Select

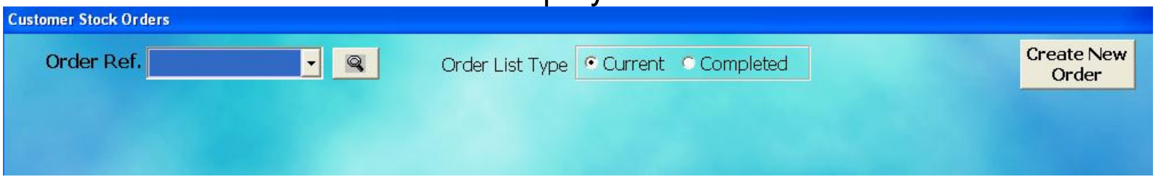
This will save the order for collection at a later date.

Add to an Existing Order

- Select

Customer Orders

The customer orders search screen is displayed



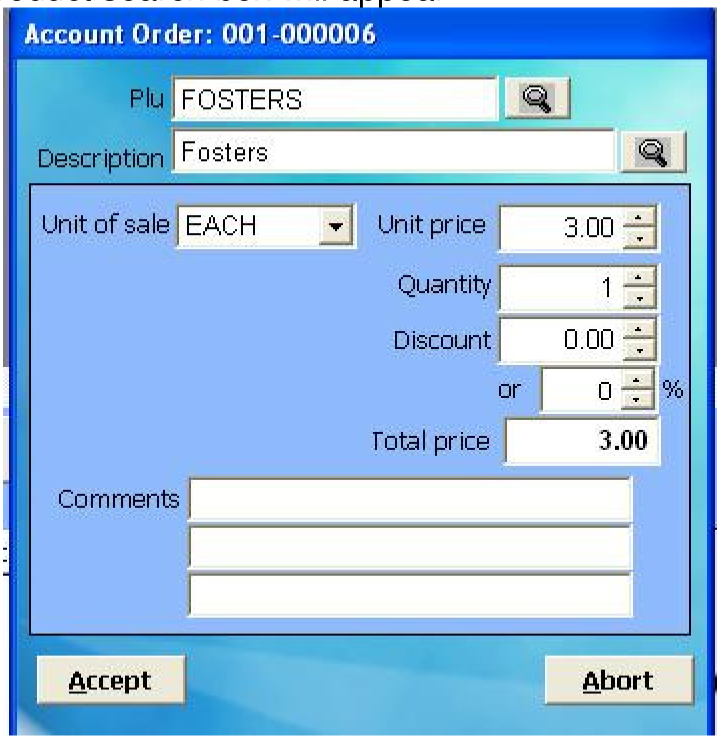
From the drop down list select the order you want to Add to

The order page is recalled

- Select

Insert product

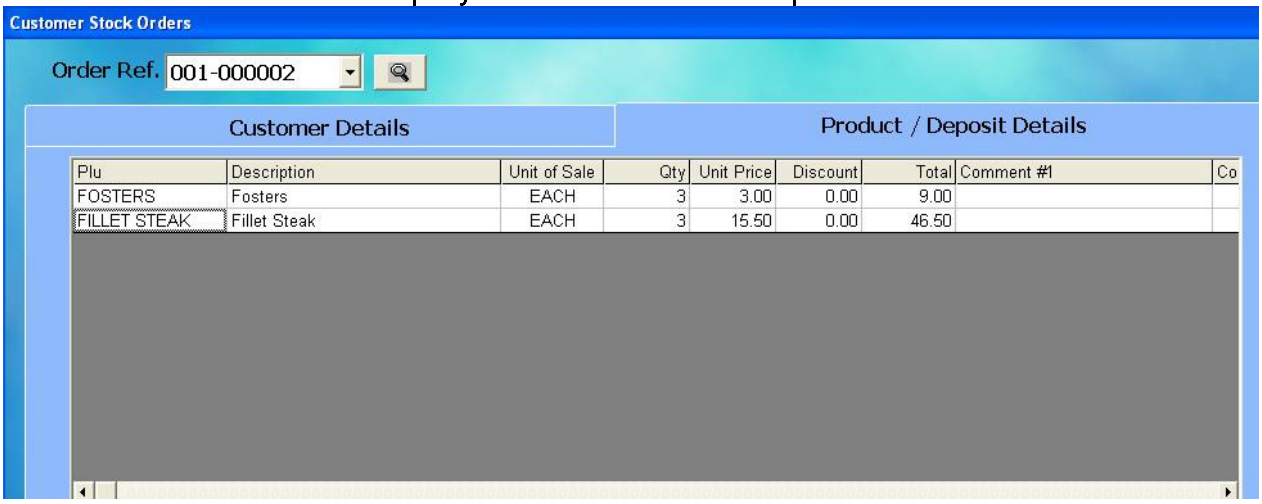
The product search box will appear



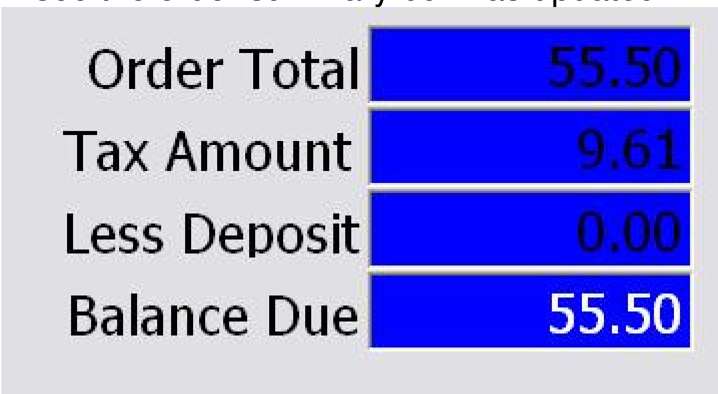
- Enter the PLU or description
- Select the quantity
- Enter any discount to be applied in either amount or %
- Enter any comments in the free text field
- Select

Accept

The customer order screen is displayed with the selected product line entered



You will see the order summary box has updated



Repeat the process until all the required products are on the order

To save the order

- Select

This will save the order for collection at a later date.

Remove an Item from an Order

- Recall the order
- Highlight the item to be removed
- Select

Repeat the process until all the required products are removed from the order

To save the order

- Select

This will save the order for collection at a later date.

Amending a Product on an Order

Recall the order

- Highlight the product to be changed
- Select

The product order details will be shown

Change the required information

When editing a product you can change:

- Unit of Sale
- Unit Cost
- Quantity
- Discount
- Comment

Save the order

To Print the Order

- Recall the Order
- Select

To Print a Mini Statement

- Recall the Order
- Select

- Select

Deleting an Order

- Recall the order
- Select

You will be asked to confirm the deletion of the order

- Select Yes

	You cannot delete an order with a deposit attached; you must refund the deposit first

Loyalty

Loyalty Points With Accounts
Loyalty Points With Customers
Loyalty Reward – Sales Value Required Per Unit
Loyalty Reward – Points Issued Per Sales Unit
Loyalty Redeem – Value of Redeem Points Unit
Loyalty Redeem – Points Required Per Redeem Unit
Loyalty Redeem – Include Current Transaction Points

Loyalty is used to give customers reward points or discounts off of sales.

Setting Up a Customer for Loyalty Discount

- Identify the customer you want to set up a discount for

On the ‘Profile’ tab

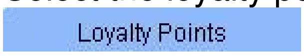
- Enter the discount you want to apply to this customer in the Loyalty Discount field

This will prompt on the terminal if you want to apply the discount every time you identify the customer in a sale

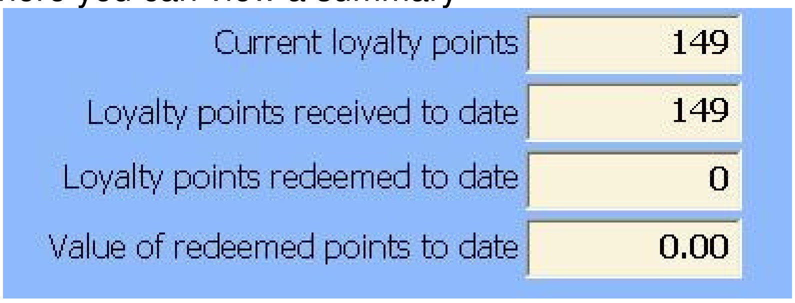
Loyalty Points Overview

In the customer profile

- Select the loyalty points tab



From here you can view a summary



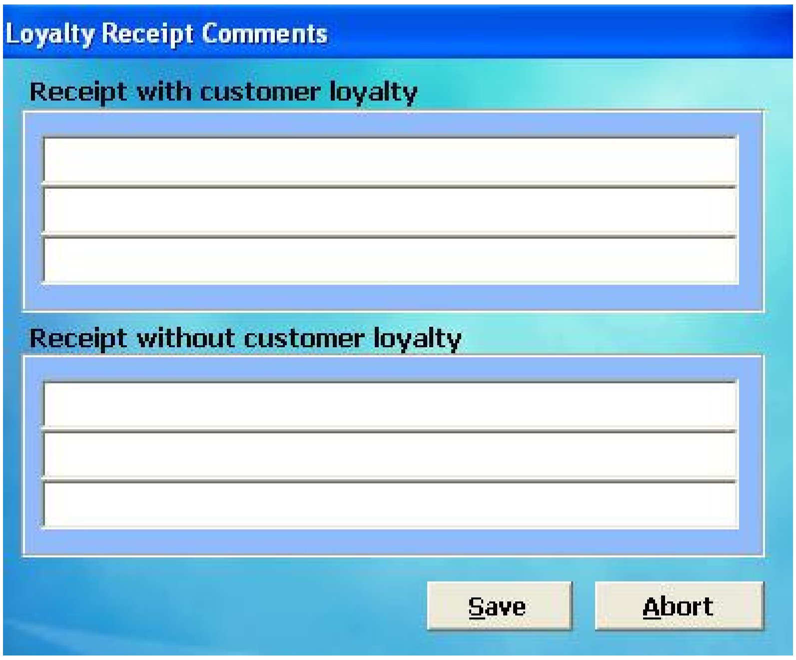
Comments

Comments are used to add text to the bottom of receipts for Customers; there are 2 different types; Customers with loyalty and Customers without loyalty.

Adding Text

- Select

The Loyalty Receipts Comments screen will be shown



☝	The text lines are limited to 3 and 30 characters per line

Enter the text for the relevant customer type

Listing

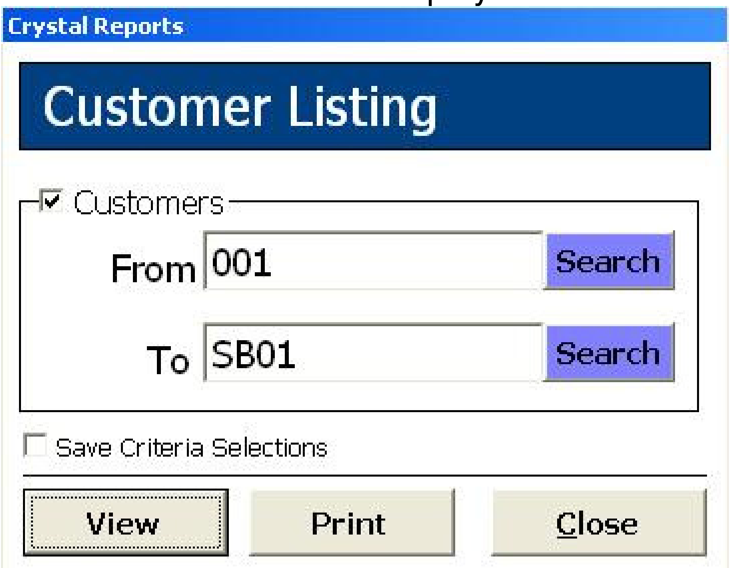
Listing runs a crystal report to list the customers for a criteria selection

Run a Report

- Select

- Select

The criteria selection screen is displayed



- View will show the report on screen with the option to print
- Print will ask if you want to print the document
- Close will take you back to the main menu

The report shows the following information

Code	Customer Name	Sales Count To Date	Sales Value To Date	Date Last Sale	On Stop?

Credit Notes on the Terminal

	Expiry Period of Credit Notes (Months) **Display Credit Remaining or Current Balance** **Customer Details Required for Credit Notes** **Credit Note Issue on Tender** **Credit Note Redeem on Tender**

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

Issuing a Credit Note

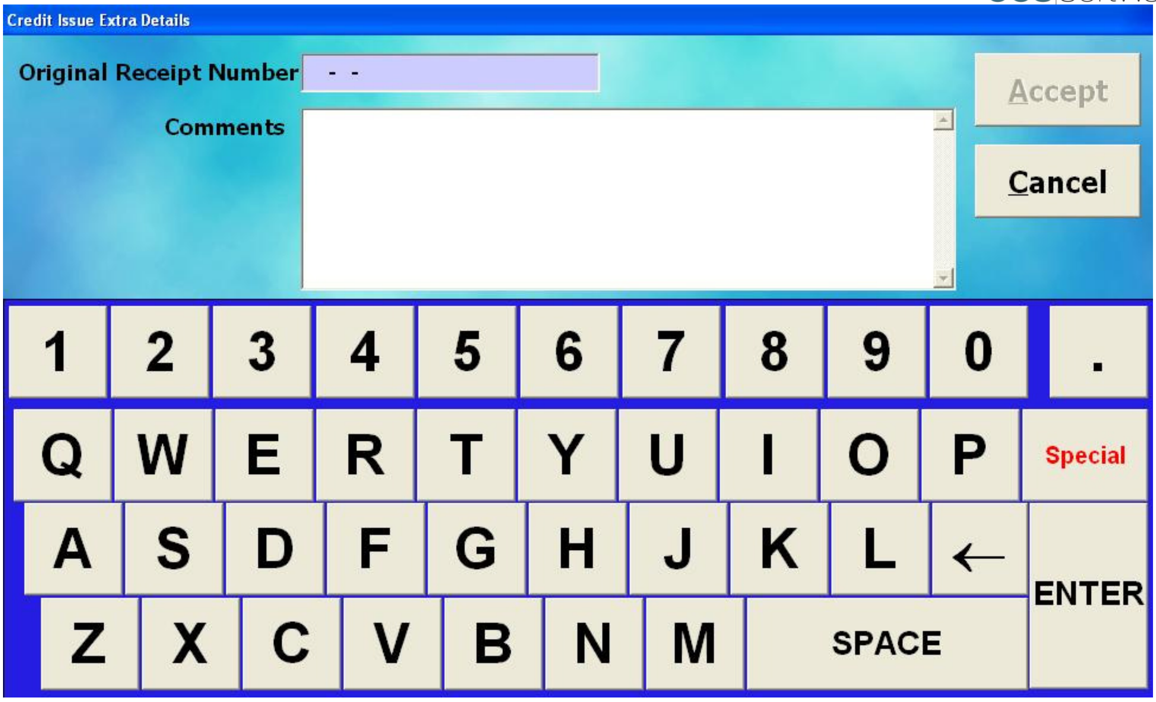
- Refund the items that you wish to issue a credit note for
- Identify the customer

Enter the customer details

- Select

- Select

The Credit Issue details screen is displayed

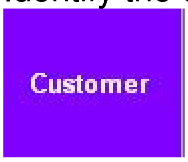


- Enter the original receipt number
- Enter Comments as required
- Select

Complete the transaction

Using/Redeeming a Credit Note

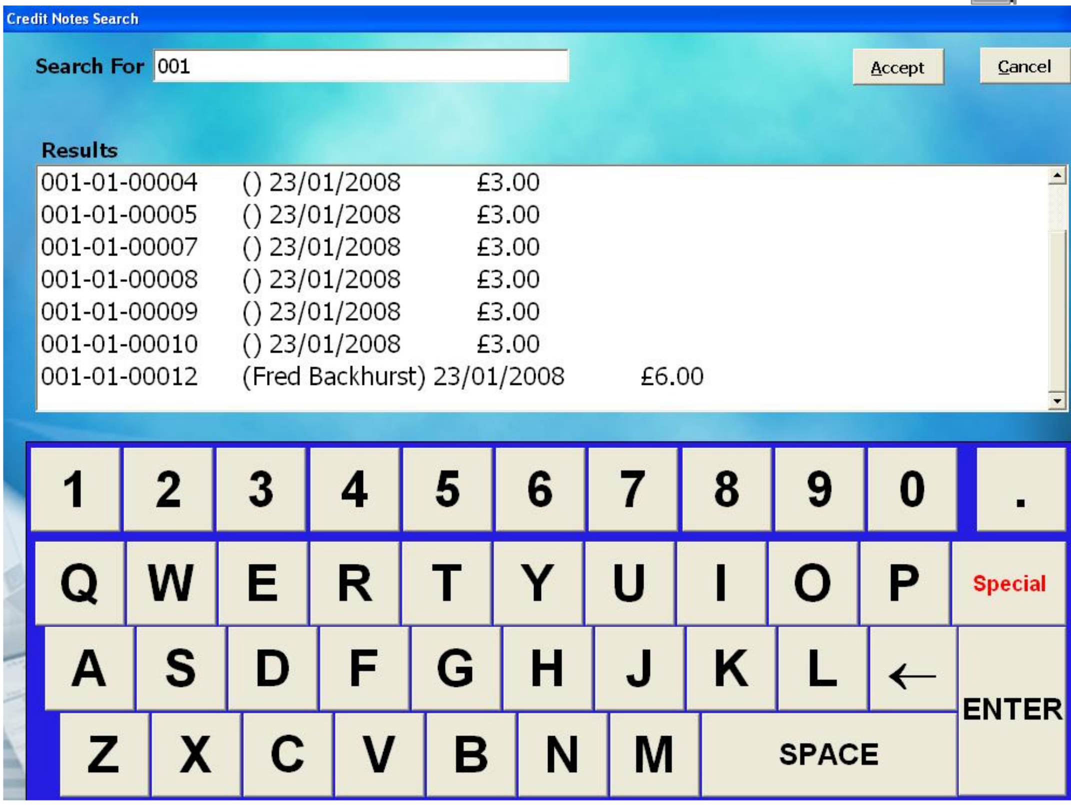
- Ring through the items on the transaction
- Identify the customer



- Select

- Select

The Credit Note Search page will be shown

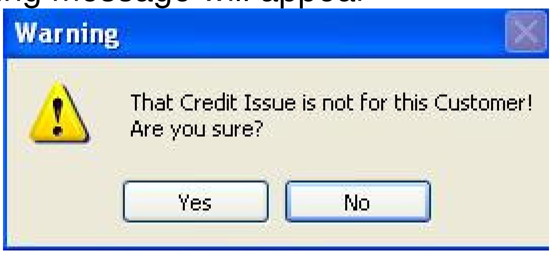


Select the credit note to be redeemed

- Select

Complete the transaction

If the Credit Note you have selected is not attached to the identified customer the following message will appear



☝	A credit note can be used as a Part Payment

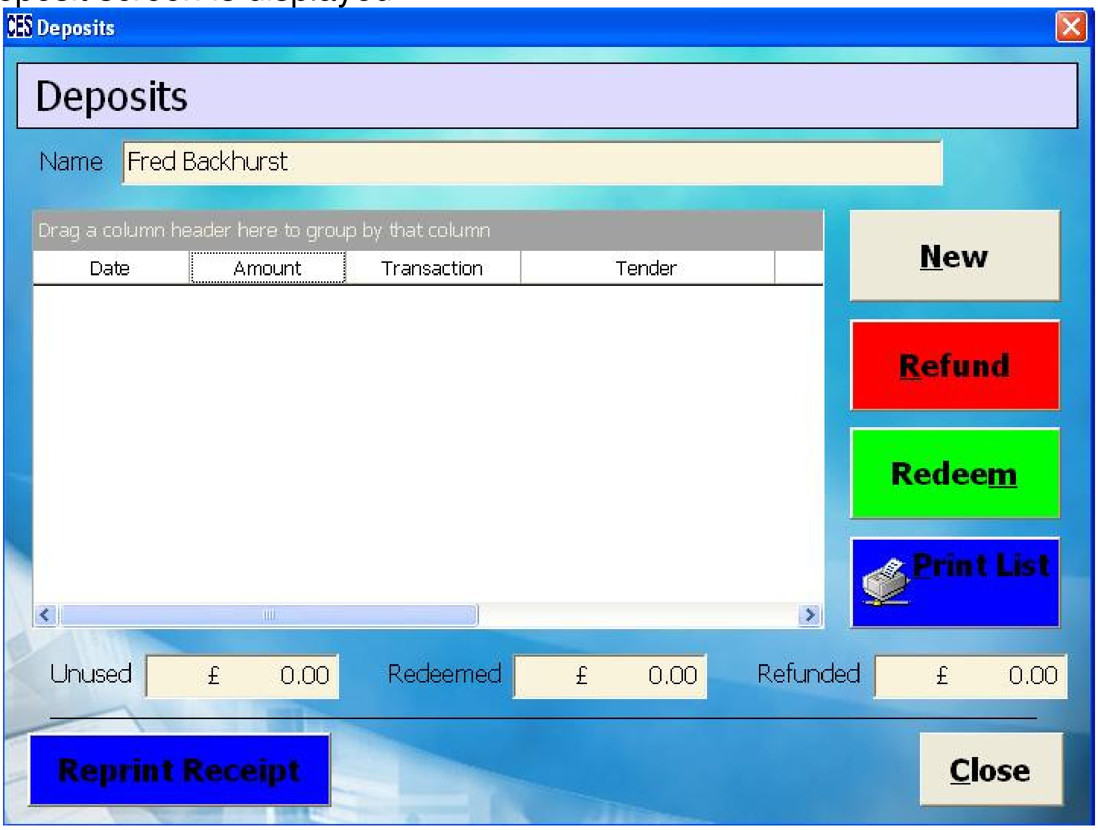
	Minimum Deposit % Required for Orders

Deposits are more commonly used to take an amount of money prior to an event taking place or goods being received

Taking a Deposit

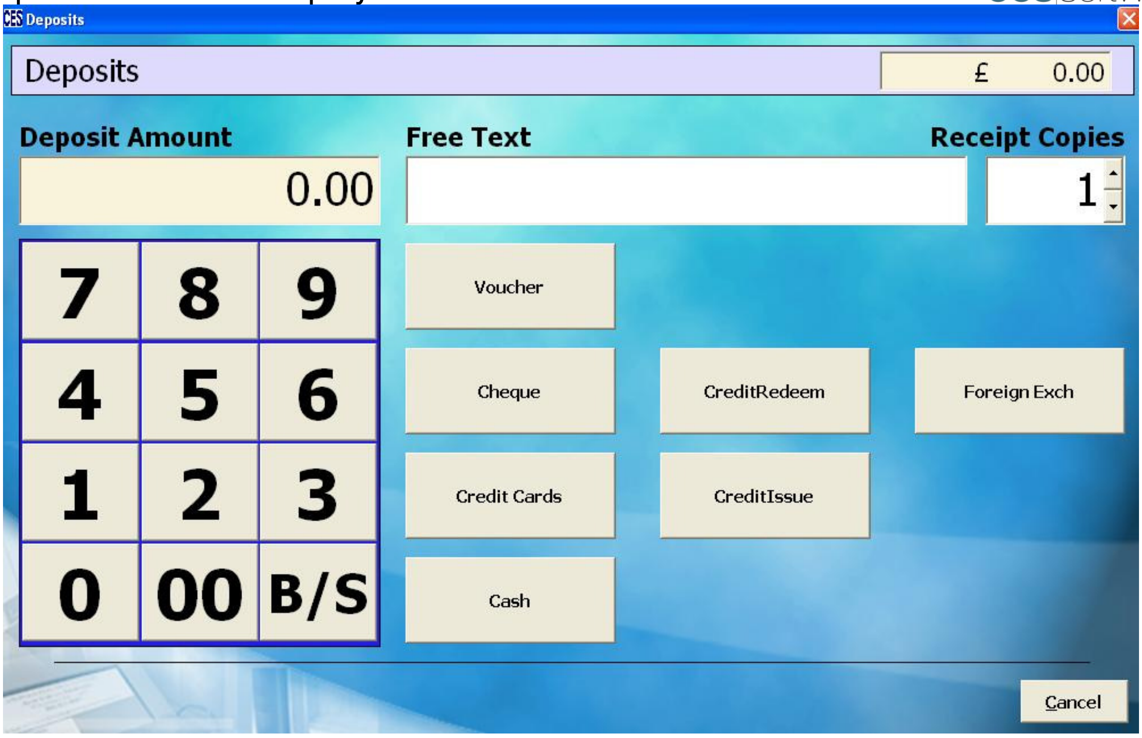
- Identify the Customer
- Select

The deposit screen is displayed



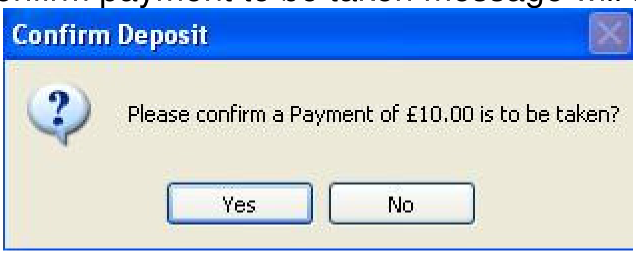
- Select

The deposits screen is displayed



- Enter the deposit amount
- In the free text field enter any relevant comments
- Select the number of receipt copies required
- Select the Tender Type *e.g.*

The confirm payment to be taken message will appear



- Select Yes

You will be returned to the customer deposit screen where the deposit will be listed

- Select

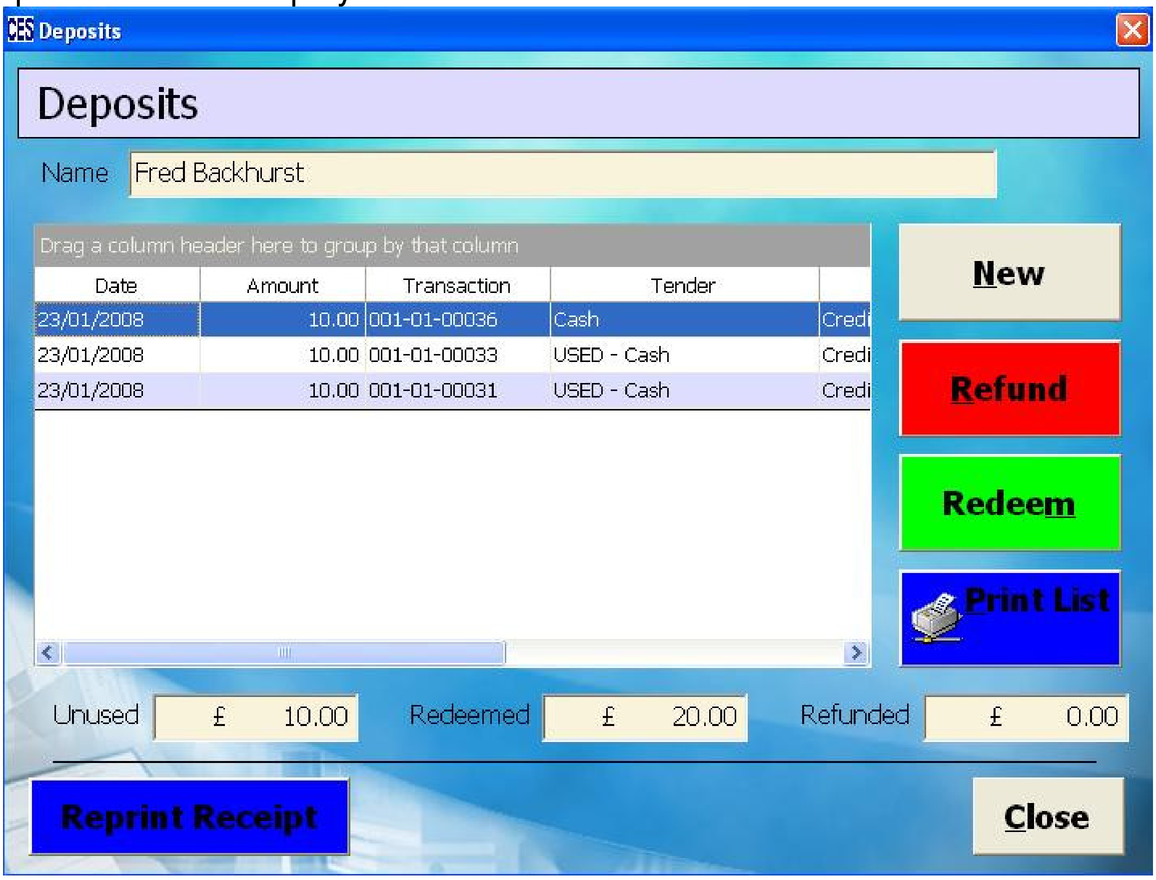
This will return you to normal sales mode

☝	The customer is still identified at this point – you need to sign off and back on again if you do not want the customer to be attached to the current transaction

Refund a Deposit

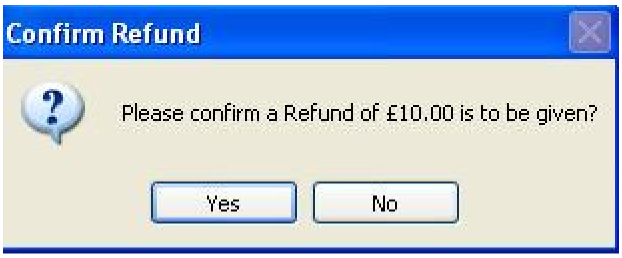
- Identify the Customer
- Select

The deposit screen is displayed



- Highlight the deposit you want to refund
- Select

You will be asked to confirm that the refund and amount to be given



- Select Yes

You can enter a reason in the free text field if required and press enter

- Select the payment method to be refunded to *e.g.*

In the deposits screen the deposit will be listed as refunded

- Select

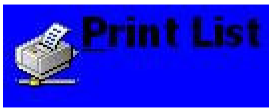
This will return you to normal sales mode

☝	The customer is still identified at this point – you need to sign off and back on again if you do not want the customer to be attached to the current transaction

☝	You cannot refund or redeem a used deposit

Print a Deposit List

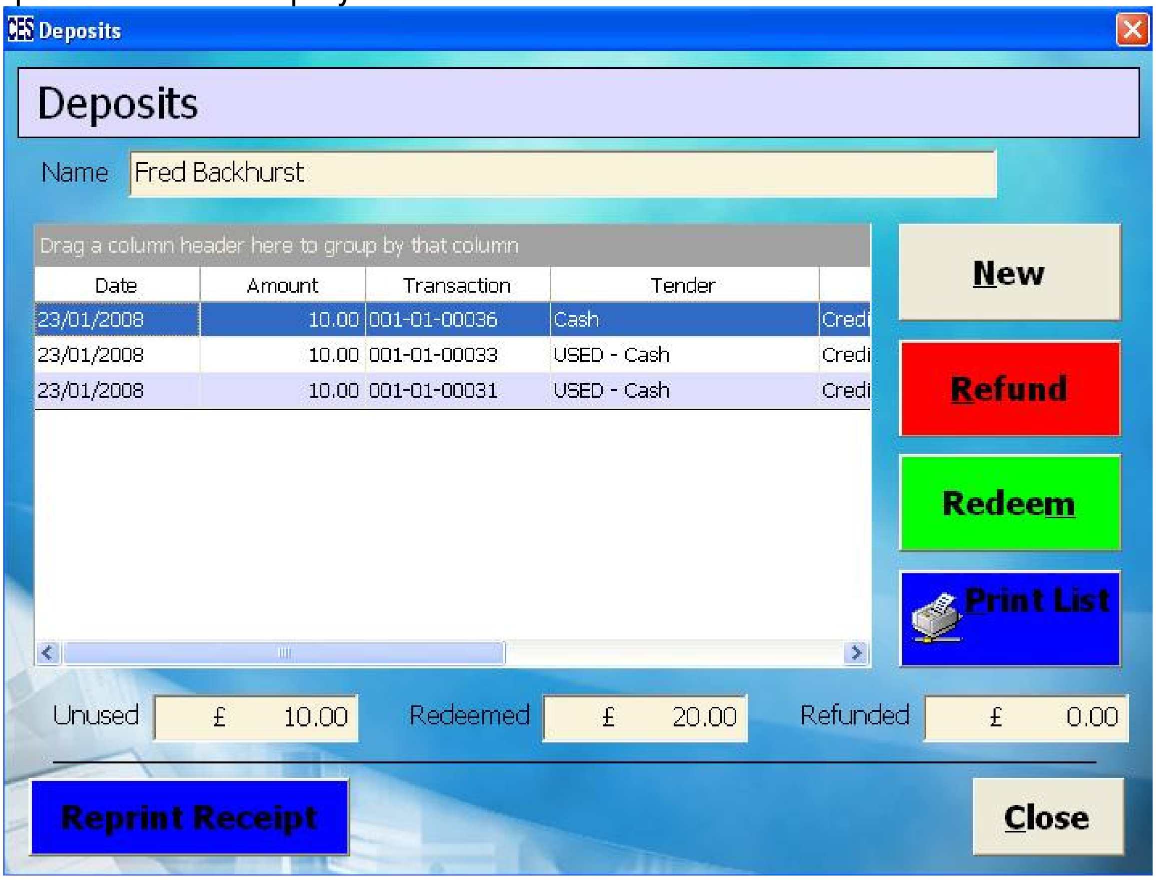
- Select



Redeeming a Deposit

- Identify the Customer
- Select

The deposit screen is displayed

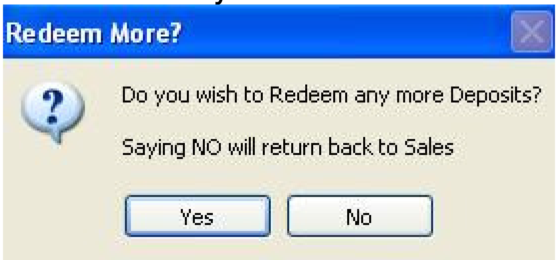


- Highlight the deposit you want to redeem
- Select

Confirm that this is the deposit you want to redeem

- Select Yes

You will be asked if you want to redeem any other deposits on this transaction



If you do press Yes, if not press No
The Deposit will appear as a -ve on the transaction pane
Complete the transaction

	You can redeem a deposit before starting the transaction or at the end

Orders

Allow overpayments on Orders
Minimum Deposit % Required for Orders
Orders Use Accounts/Customers

Orders are used predominantly for forward ordering e.g. a bakery may have customers coming in and placing orders for the following day.
Orders can be used in conjunction with deposits.

Create a New Order

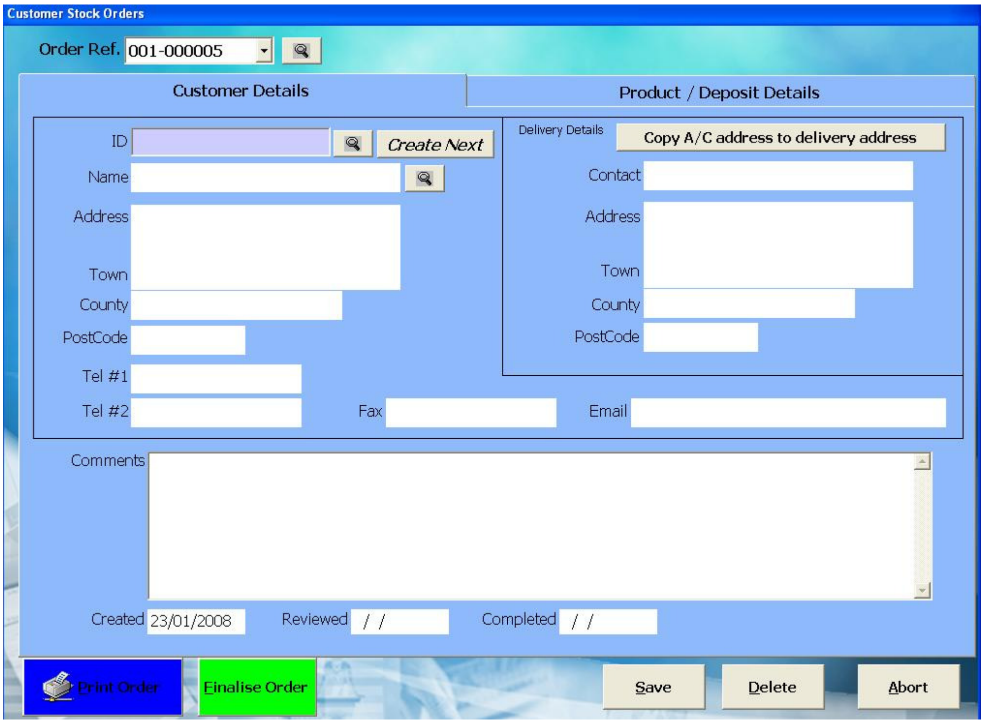
- Select


- Select


You will be asked to confirm the creation of a new order

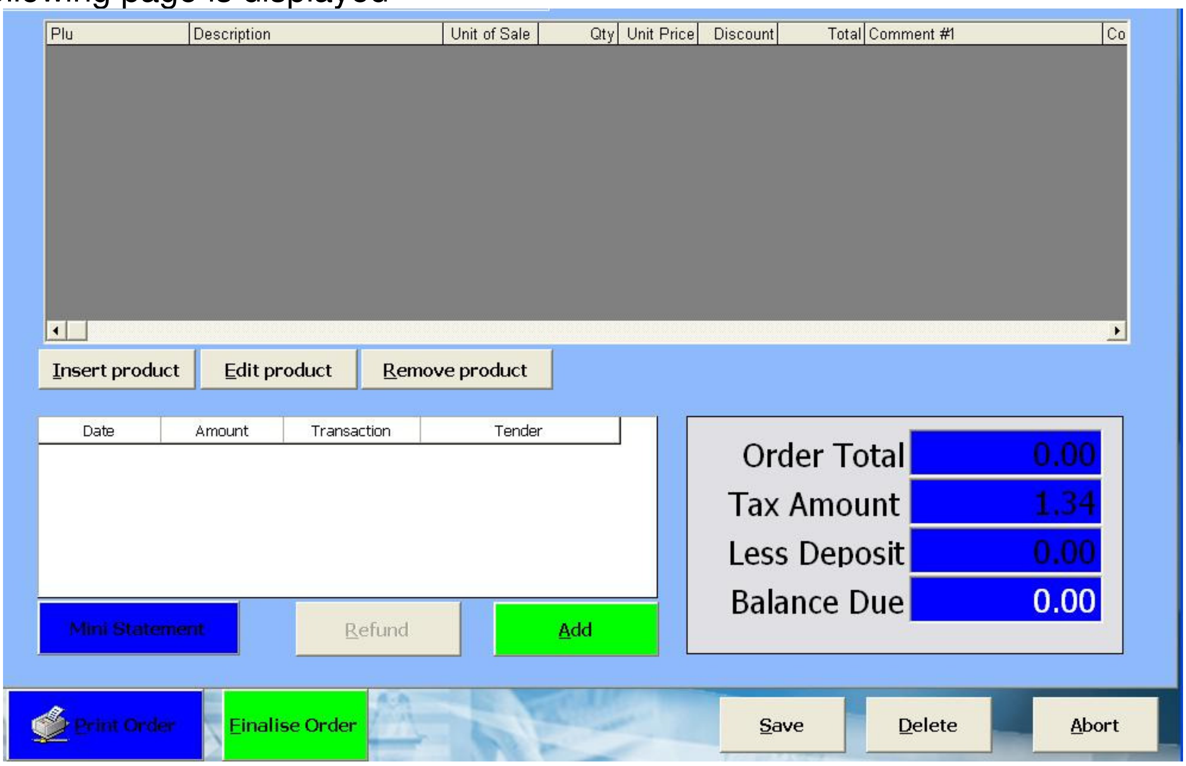

- Select Yes

The Customer Stock Order Screen is displayed



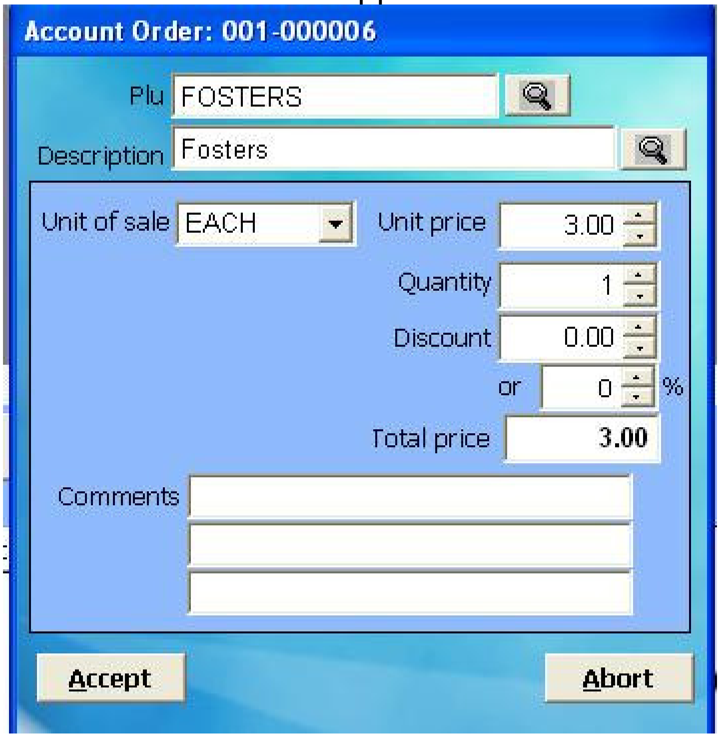
- Identify the customer
- Select

The following page is displayed



- Select

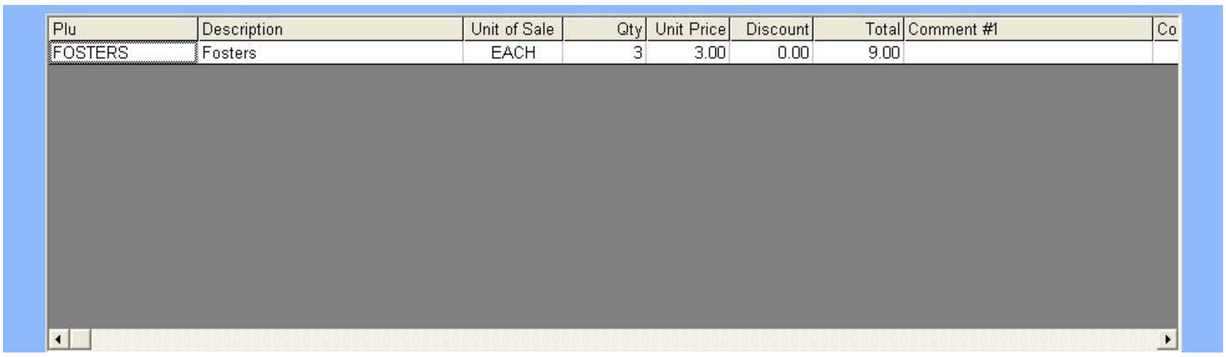
The product search box will appear



- Enter the PLU or description
- Select the quantity
- Enter any discount to be applied in either amount or %
- Enter any comments in the free text field
- Select

  Accept

The customer order screen is displayed with the selected product line entered



Repeat the process until all the required products are on the order
To save the order

- Select

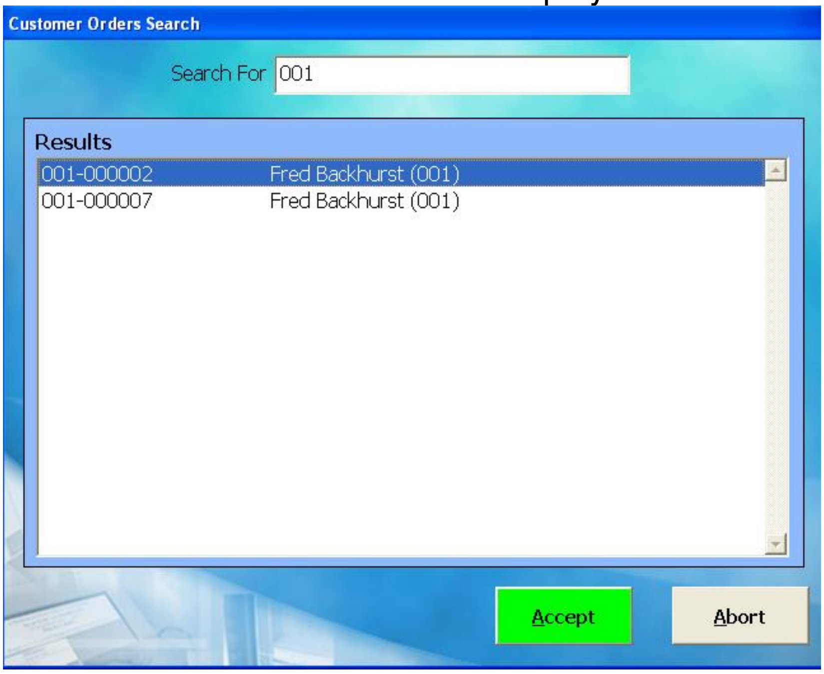
  Save

This will save the order for collection at a later date.

Add to an Existing Order

- Identify the customer
- Select

The customer orders search screen is displayed



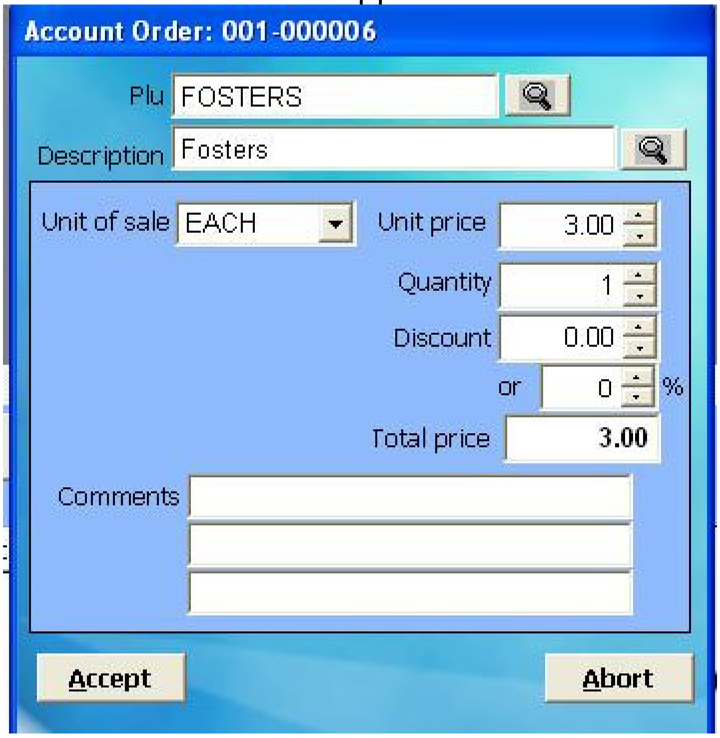
- Highlight the order you want to add items to

Select

The order page is recalled

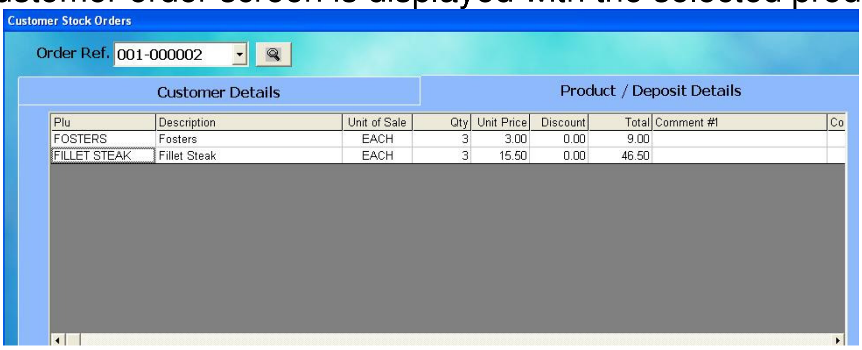
- Select

The product search box will appear

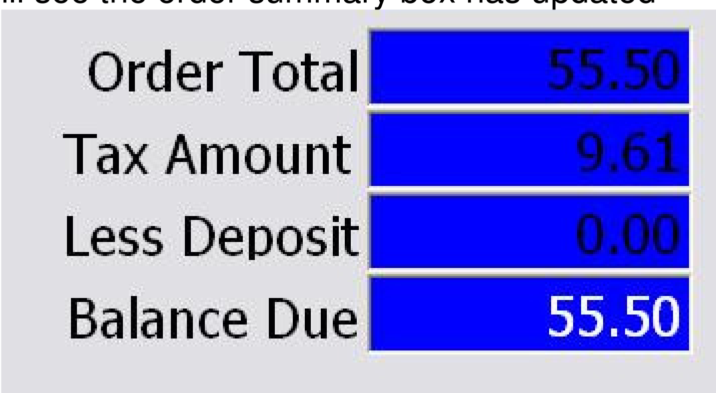


- Enter the PLU or description
- Select the quantity
- Enter any discount to be applied in either amount or %
- Enter any comments in the free text field
- Select

The customer order screen is displayed with the selected product line entered



You will see the order summary box has updated



Repeat the process until all the required products are on the order

To save the order

- Select

This will save the order for collection at a later date.

Remove an Item from an Order

- Recall the order
- Highlight the item to be removed
- Select

Repeat the process until all the required products are removed from the order
To save the order

- Select

This will save the order for collection at a later date.

Amending a Product on an Order

Recall the order

- Highlight the product to be changed
- Select

The product order details will be shown

Change the required information
When editing a product you can change:

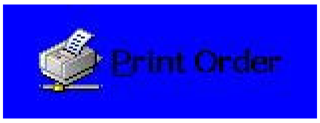
- Unit of Sale
- Unit Cost

- Quantity
- Discount
- Comment

Save the order

To Print the Order

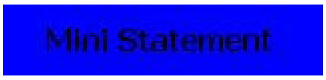
- Recall the Order
- Select



To Print a Mini Statement

- Recall the Order
- Select

- Select



Deleting an Order

- Recall the order
- Select

You will be asked to confirm the deletion of the order

- Select Yes

☝	You cannot delete an order with a deposit attached; you must refund the deposit first

Adding a Deposit to an Order

- Select the order you want to add a deposit to

On the Product/Deposit Details tab

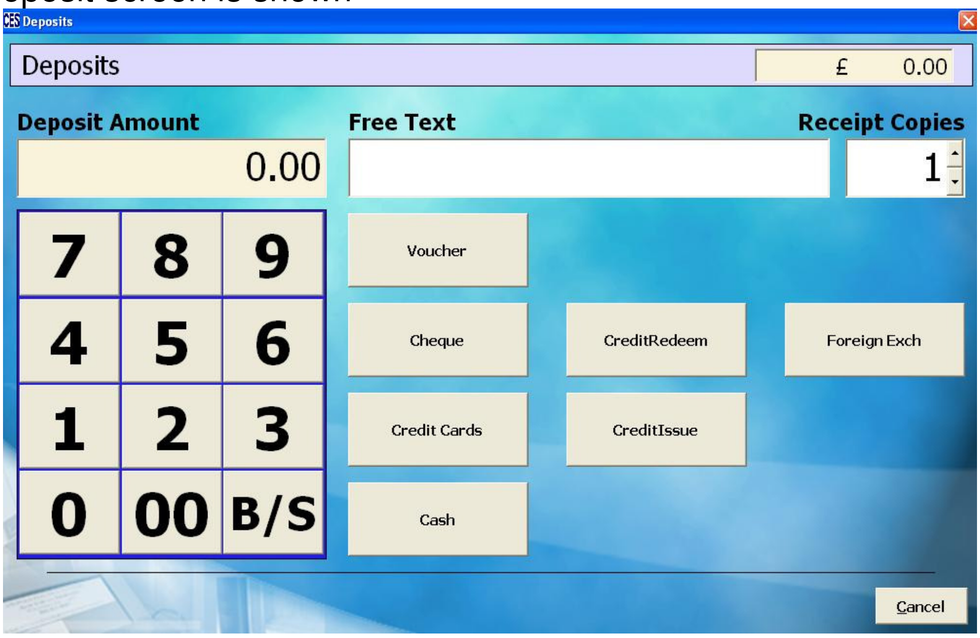
- Select

The calendar will appear

Select the date that the order will be collected

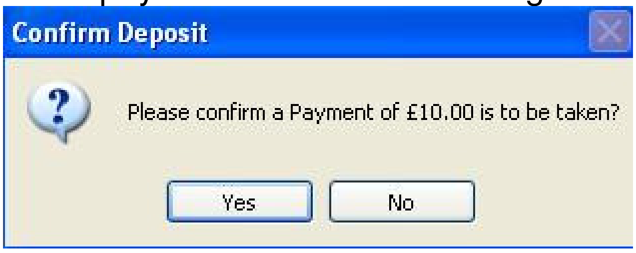
- Select

The Deposit screen is shown



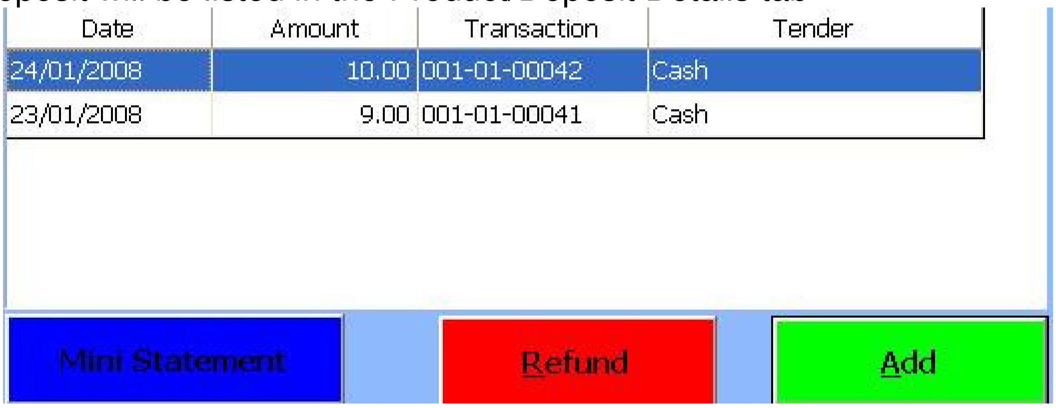
- Enter the deposit amount
- Enter comments as required in the free text field
- Select the number of receipt copies you require
- Select the tender type *e.g.*

The confirm payment to be taken message will appear

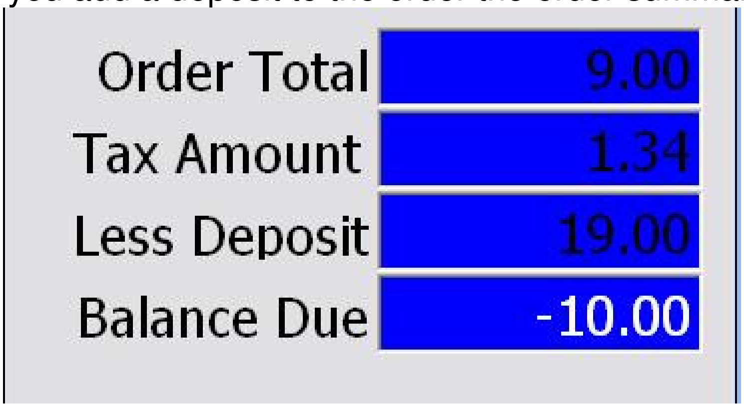


- Select Yes

The deposit will be listed in the Product/Deposit Details tab



When you add a deposit to the order the order summary will be updated to reflect it



To save the order

- Select

This will save the order for collection at a later date.

	This can be done when the order is being taken or after it has been taken; there is no limit to the number of deposits you can attach to an order

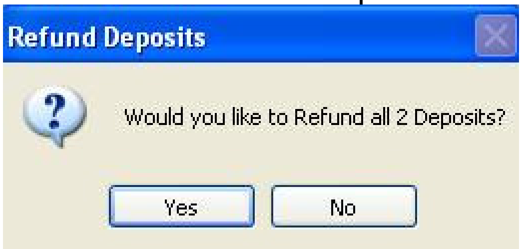
Refunding a Deposit from an Order

- Recall the Order that you want to refund the deposit from

On the Product/Deposit Details tab

- Highlight the deposit you want to refund back to the customer
- Select

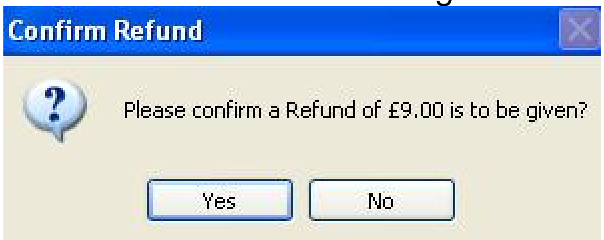
If you have more than one deposit on the order you will see the following message



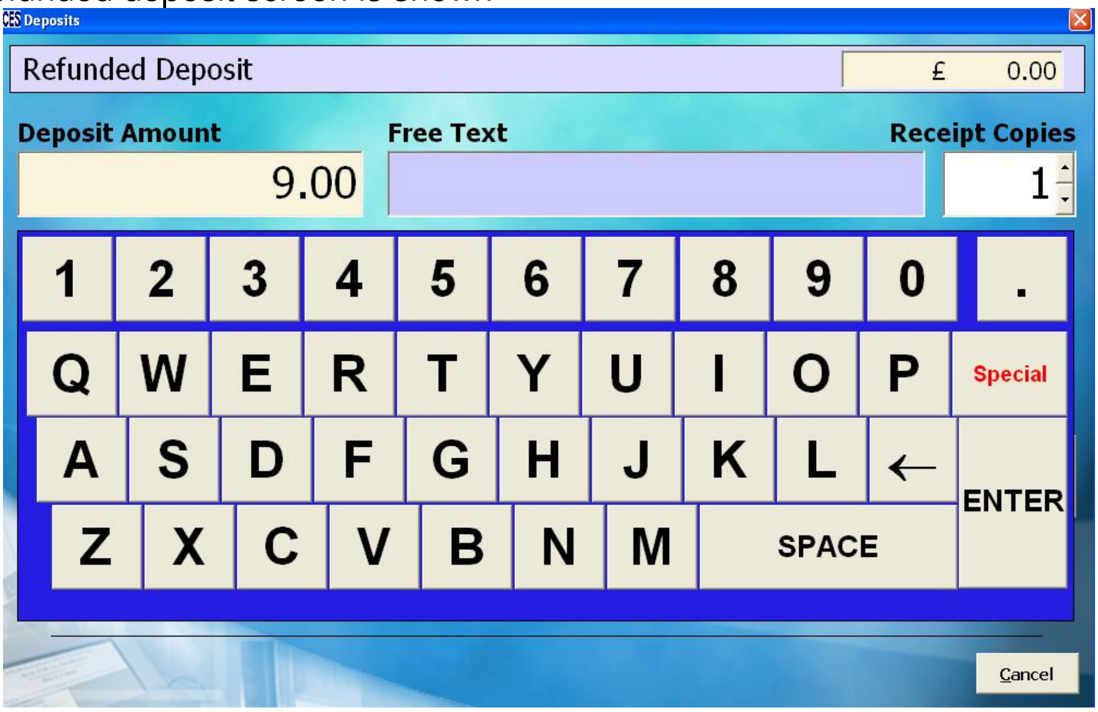
Yes will refund both deposits; No will refund the highlighted deposit

- Select No

The confirm refund amount message will be shown

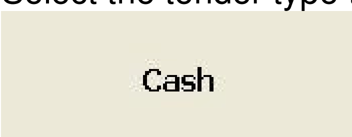


The refunded deposit screen is shown



In the Free Text field enter comments/reasons for refund as required

- Select enter
- Select the tender type the refund will be given in *e.g.*



The refunded deposit will be listed

Date	Amount	Transaction	Tender
24/01/2008	10.00	001-01-00042	Cash
23/01/2008	9.00	001-01-00041	Cash
24/01/2008	9.00	001-01-00043	REFUND: Cash

Mini Statement   Refund   Add

The summary box will be updated

Order Total	9.00
Tax Amount	2.68
Less Deposit	10.00
Balance Due	-1.00

To save the order

- Select

Save

This will save the order for collection at a later date.

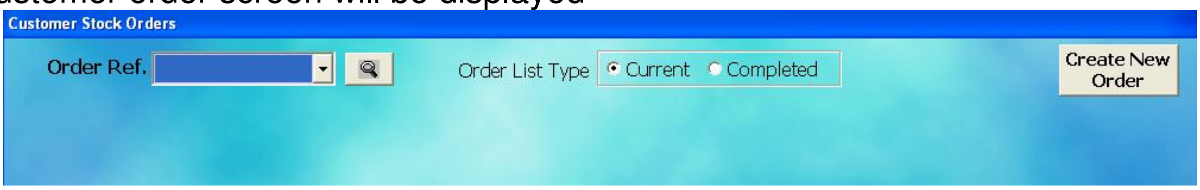
Finalising an Order

- Select

Orders

☝	You can also recall the order by identifying the customer first

The customer order screen will be displayed



- From the drop down box select the order to be finalised / collected

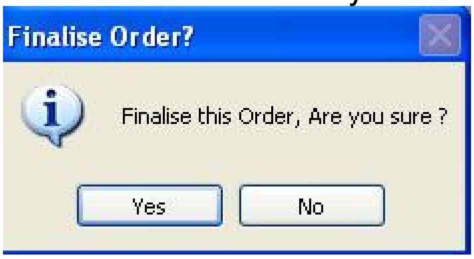
Verify the details of the order are correct

- Select

Finalise Order

☝	Once you have selected finalise you cannot Void or Reverse the transaction

You will be asked to confirm you want to finalise the order



- Select Yes

The order product and deposit details (if applicable) will be displayed in the transaction pane with the outstanding amount to be paid (+) or monies owing to customer (-)

Qty	Description	Price
3	Fosters @ £3.00	£9.00
1	Order Deposit - (Ord: 001...	£-10.00

Complete the transaction

☝	Before the tender type has been chosen you can add products to the transaction

A customer may be set to a status of 'On Stop' if they are overdue with account payments for example.

What happens on the till?

Once the customer has been identified you will see the following message

- Select OK

You will be taken back to the transaction screen

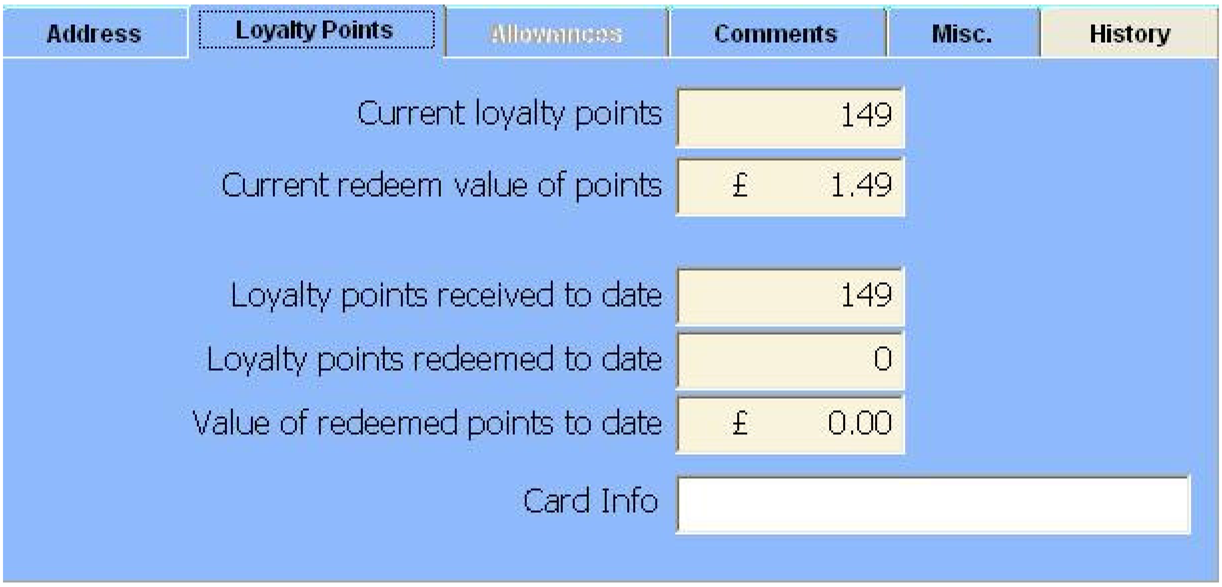
☝	You cannot associate a customer with a transaction until the status of 'On Stop' has been removed

Loyalty

Making a Sale with Loyalty

- Ring through the items to be sold
- Identify the Customer

This will display the customer profile page on the Loyalty point tab you can see an overview of the points



- Accept the customer

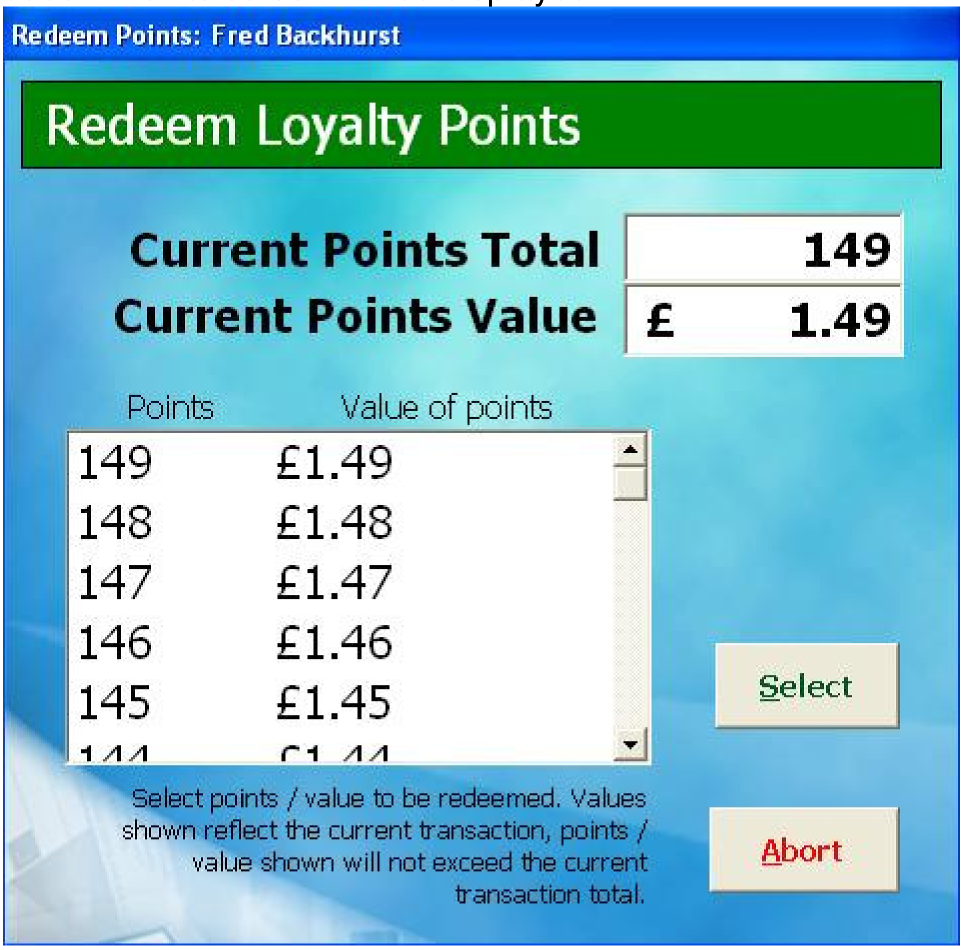
You will be asked if you want to apply the customer discount to this transaction

- Select Yes or No depending if you want to apply the discount

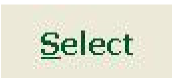
Redeeming Points

- Select

The Redeem Points screen will be displayed



- From the list highlight the number of points you want to redeem
- Press



Complete the transaction

	If you do not want to redeem the points select  and complete the transaction

Once the points have been redeemed the customer record is updated to reflect this

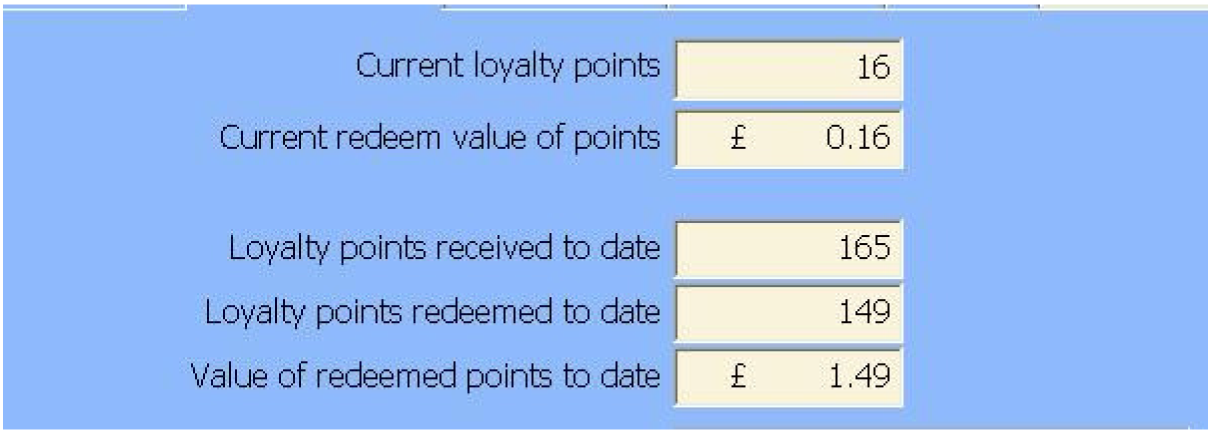


Table Planner

Do not prompt for table status when using table planner

Table Planner is the utility that ‘draws’ the graphics for tables, for it to work it must have a charge sheet set up for it (see charge sheet section). Table Planner.exe is in c:\Touch – double click to run.

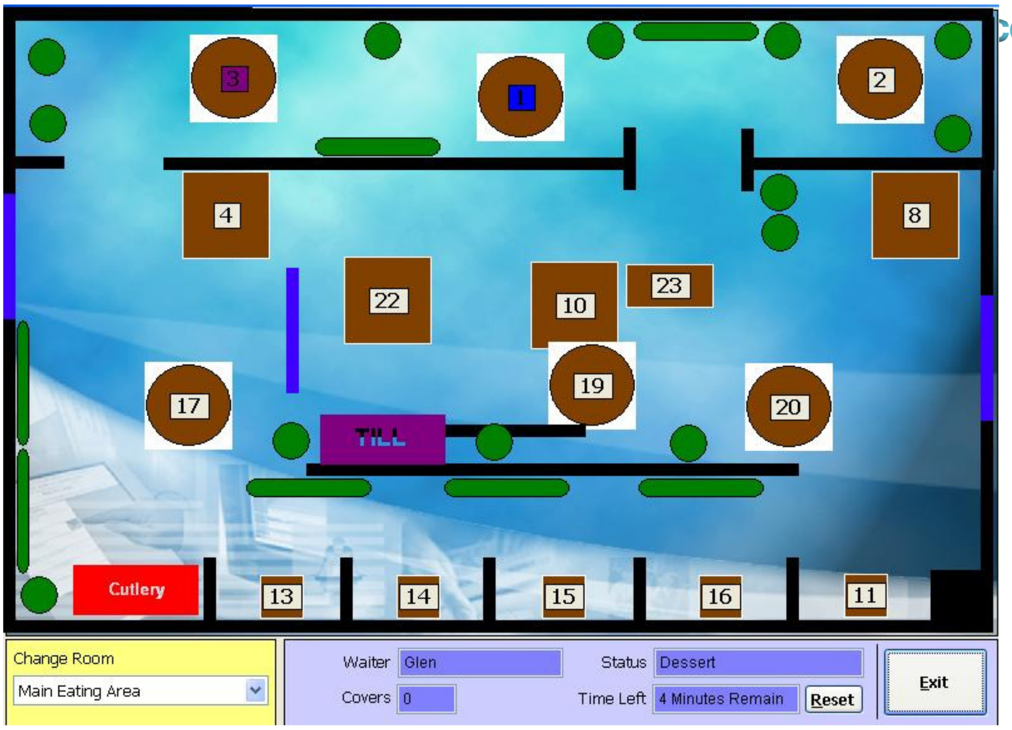
Viewer

The viewer lets you view a chosen room/plan and looks similar to the edit screen – the purpose of this screen is to monitor the table and their statuses and the time remaining, it will also indicate any tables that are overdue

Select Viewer

- Highlight the plan you want to view
- Select View

The plan of the selected room is displayed



- Select the table you want to view

The details for the selected table will be displayed

☝	Remember from here you cannot edit only view the statuses

☝	The Waiter shown is the last person to recall that table – it is not dependant on changes being made or statuses being altered

Editor

Editor allows you to change the plan of a room

- Select Editor
- Highlight the room you want to edit
- Select Edit

Moving Objects on the Planner

- Click on the outside area of the object you want to move
- Drag and Drop the object to the new position

Removing Objects from the Planner

- Click on the object you want to remove
- Select Remove

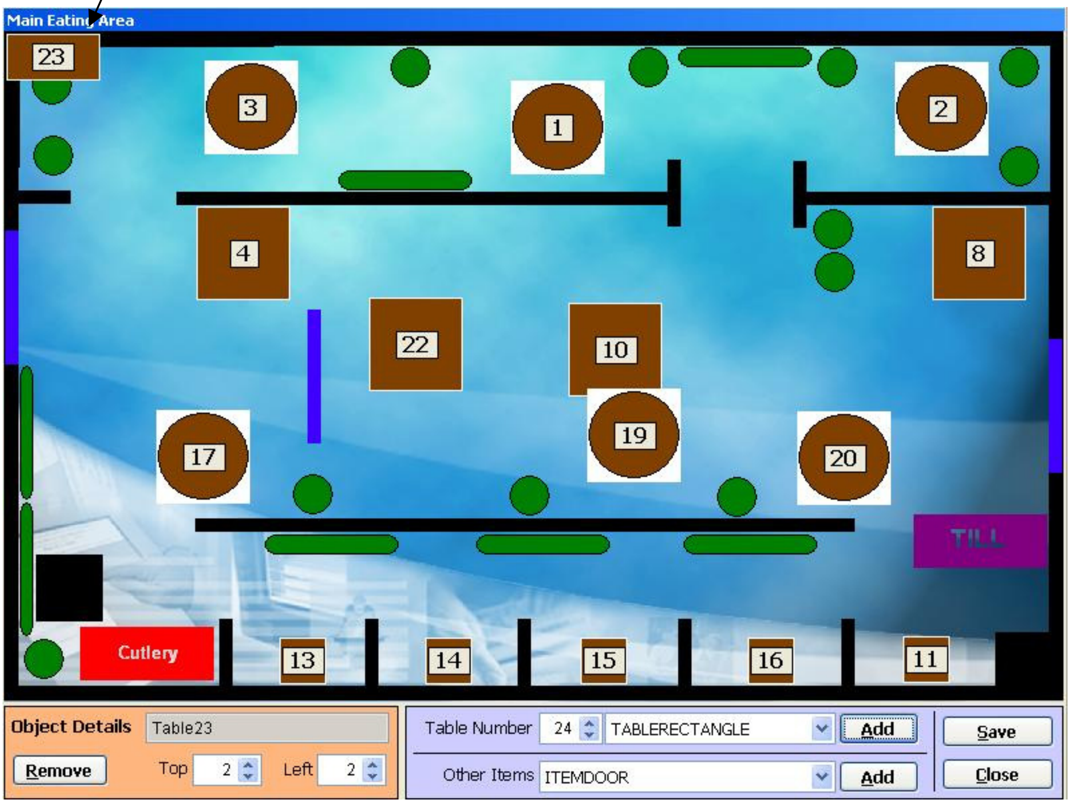
Adding Items to the Planner

Select the item to be added from one of the dropdown boxes

If adding a table select the table number to be added first

- Select Add

The object will appear in the top left corner of the screen



- Drag and drop the table to the desired position

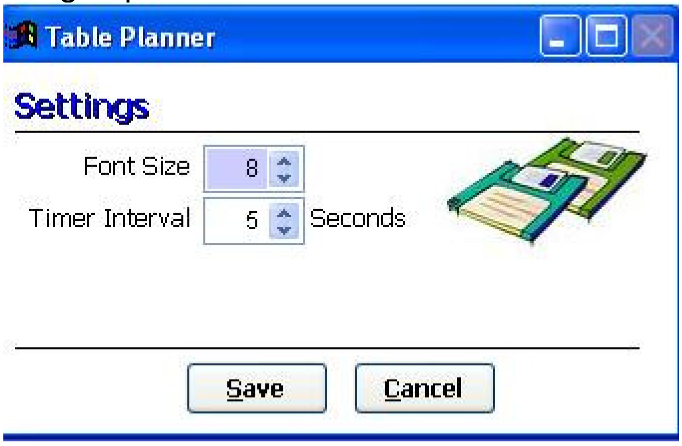
☝	You can fine tune the position of the object by using the Top and Left position arrows

Once you have made all the changes select Save

☝	If you want to add images of your own tables must be prefixed with Table and items must be prefixed with Item they are stored in c:\touch\graphics

Settings

The settings option defined the default font size and time interval value in seconds



Font Size

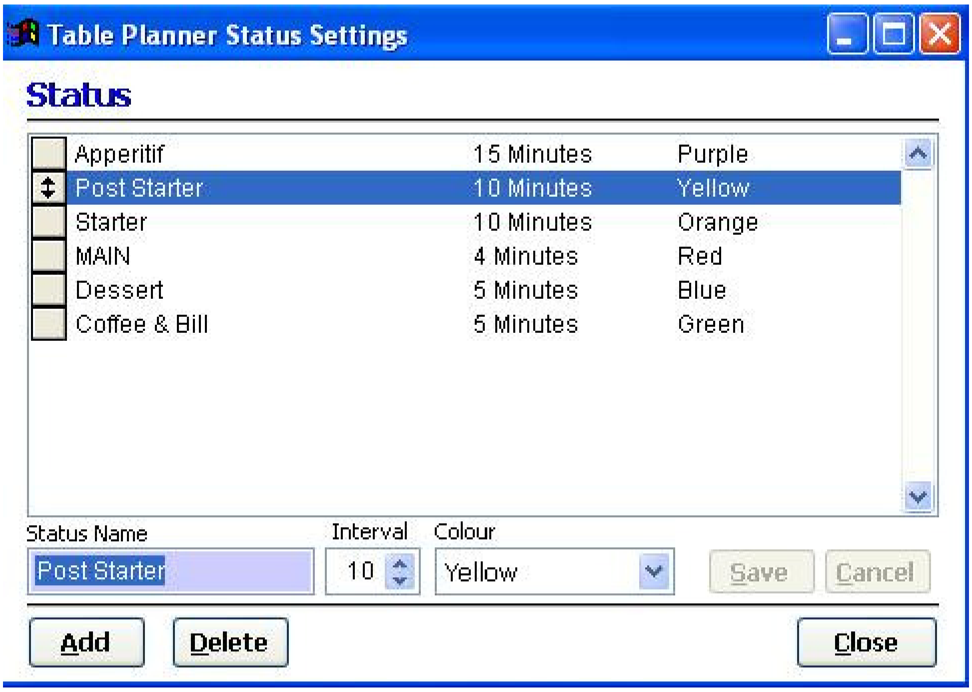
This is the standard font size that will be displayed throughout the table planner

Timer Interval

Time in seconds that the table planner refreshes the table planner viewer

Statuses

Statuses is the application which allows you to define the various statuses of a table *e.g. if they are on their main course* these can be timed so that when the given limit is reached the table will flash to indicate that the table should be attended to, the colour can also be set to change so you can see at a glance for example what tables are likely to be free soon



Add a New Status

- Select Add

The status name field will say New Status

- Type in the name of the status you want to create
- Set the interval (the time in minutes the status should expire)
- Chose the colour you want the table to be when this status is selected
- Select Save

Positioning a Status

Click and Drag the status to the desired position in the list (this is the order the statuses will appear on the till

Edit a Status

- Click on the status to be edited
- Change the required information
- Select Save

Delete a Status

- Highlight the status to be deleted
- Select delete
- Confirm that you want to delete the status

Troubleshooting

Error Messages

Error Message	Solution

Terminal

Is the till slow signing in?
Solution: Zap interrupt.dbf

Is it slow opening a table?
Solution: Zap sheetsbackup.dbf

Is the till slow ending a sale?
Solution: Turn off 'Keep stock transaction history' on all tills

Refund reason code when you select the abort button and the software locks up
Solution open sales.dbf using Foxpro and look for any refund reason column that has a 0 in it, change to 1 save and restart the software. This has been fixed on v8

Reoccurring amount adding to the subtotal
Solution: Zap the interrupts

Central/Archive Sales not showing
Solution: Set the number of terminals in back office – if this is not done then will only show sales for terminal 1

Buttons disappearing every time you click on them?
Solution: The Ctrl button is being held down at the same time – if the user should not be able to edit screens un tick the 'Allow Screen Changes' box in their operator profile

Cannot give discount on certain products?
Solution: In the product record on the profile tab the ‘max discount’ box should be filled in with the maximum amount of discount that can be applied to that product if left at 0 then no discount can be applied

If you transfer a table to a number that is not on the table planner, you will not be able to cash it off and may get array errors. To rectify this use
Solution - transfer bill/tp
to transfer only to tables on table planner
to clear off the offending tables, use a
X*charge
where X is the charge sheet number
to open them, and then cash them off

Printing

If the printer prints gibberish
Solution: Check the printer baud rate is set to 9600, as this is the CES Touch default. In Back office > utilities > system menu > settings you can change this to 19200 or 38400.

The dot matrix kitchen printer ticket text is not fitting on a single line?
Solution: Back office> utilities > system menu > settings > remote**x** – dot matrix control codes where **x** is the remote number

Cannot access the remoteprintersettings.dbf
Solution - if file checker gives you this error stop the remote printer engine

Barcodes are printing with $ or & in a large font on the label
Solution: Copy the contents of the ‘Barcode_ Fonts’ folder in c:\touch into the fonts folder in the control panel

Reports

When running reports there are products missing?
Solution: In the product record on the profile tab make sure the product is linked to a department, the department is linked to a group and that there is a supplier linked to the product

Blank Stock Reports
Solution: The most likely cause of this is because the departments are not assigned to a group

General

Do not turn off the till from the mains or the rocker switch (unless otherwise advised) without closing the software.

Cannot connect to terminal/share
Solution - try pinging the terminal to eliminate hardware issues
control panel / administrative tools / Local Security Policy / local policies / user rights assignment
check guest can access the network and is not under "deny access"
control panel / administrative tools / computer management / system tools / local users and groups / users
check guest account is enabled

dlportio.sys error
Solution: use the dlportio installer on the touch cd to install the relevant drivers

prompt to run dailytidyup.exe in settings = YES

Feedback Form

Whist we make every effort to ensure the manual is accurate there may be some things that have been unintentionally incorrectly documented or have been missed in updates, the version of software that the manual is current to is shown on the front page and later releases will be/are documented in a later manual. If you do find any inaccuracies, something that is not reader friendly or something you think should be added (e.g. a top tip of your own) please let me know!

Topic:..

Which Manual is it to be added to? Dealer/User/Both

Change to be made:..
....
....

Please feel free to send me the page with comments on if that is easier; you can email me back at sarahbackhurst@CES.co.uk or fax me on 0208 839 1060