# Portal User Guide

## Company Management


Published: Monday, 27 February 2017

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# Configuring the Portal for your company

You can configure how many systems of the Portal operate to suit your company.

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# Company Maintenance screen

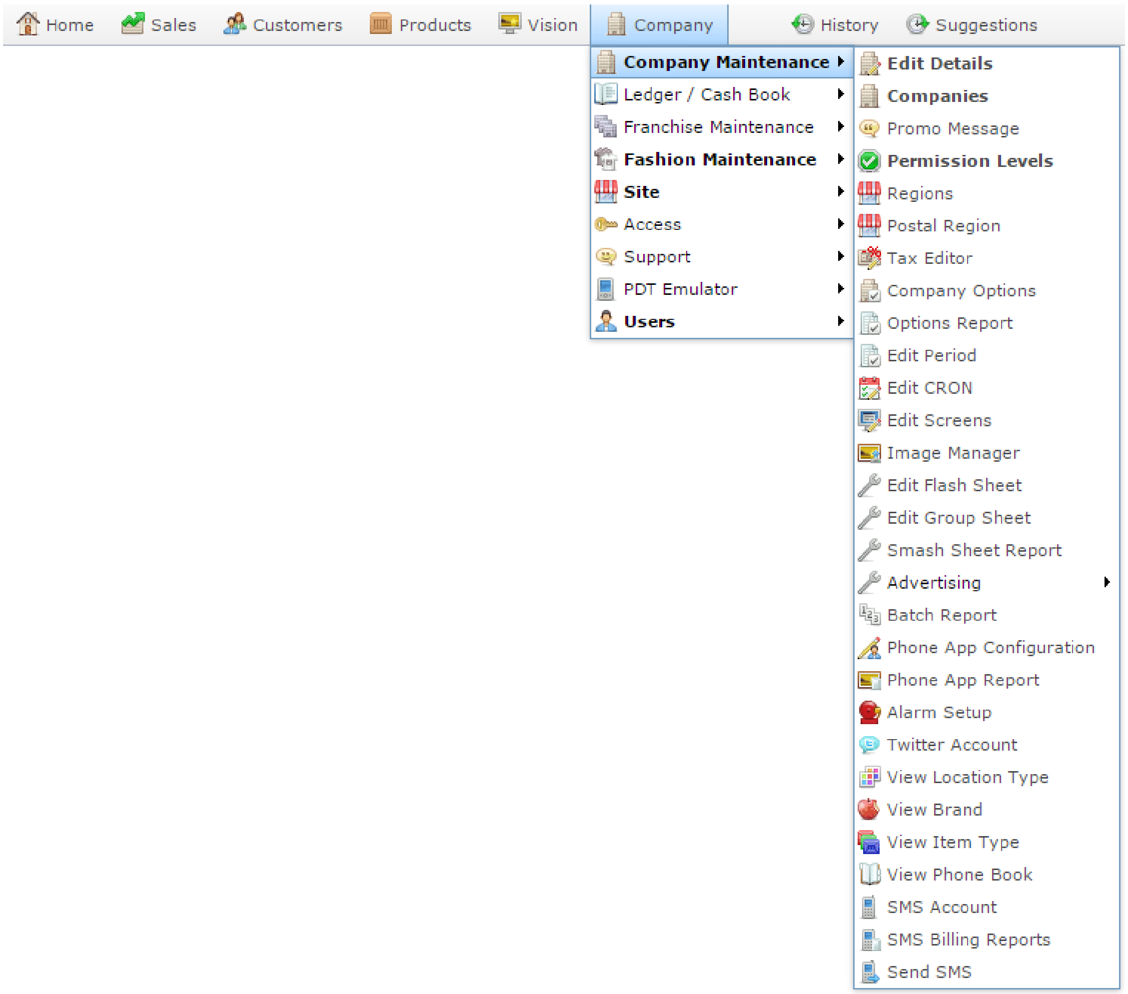
Use the Company Maintenance screen to maintain primary company information and company-wide defaults.

## Opening the Company Maintenance screen

To open the Company Maintenance screen:

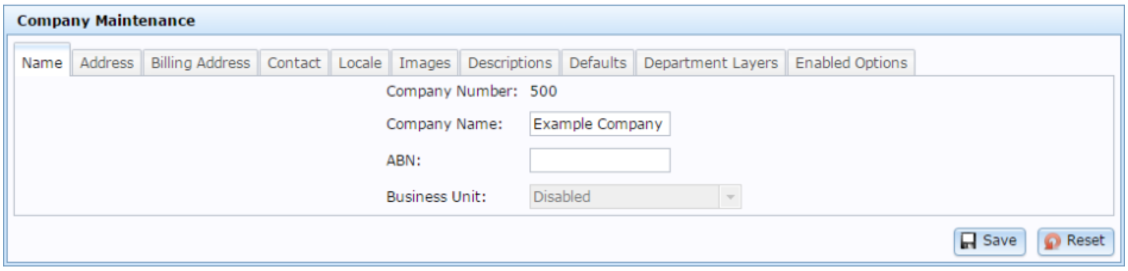
1. Press 

.
2. Press Company Maintenance > Edit Details .




The Company Maintenance screen is displayed.

Company Maintenance screen



# Company Maintenance screen key fields and buttons

## Common buttons

| Button | Description |
|---|---|
|  | Save any changes made to the company information. |
|  | Undo any changes made to the company information since the last save. |

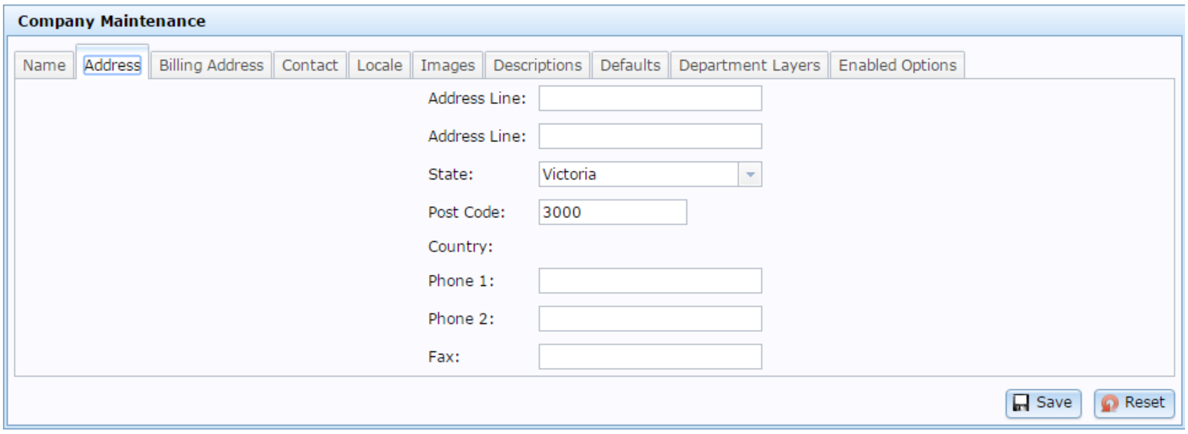
## Name tab

Use this area to define the company's name, unique identification number and business unit, if applicable.

| Field | Description |
|---|---|
| **Company Number** | Unique code identifying the company within the Portal. |
| **Company Name** | Trading name of the company. |
| **ABN** | Government identification number for the company. For example, Australian Business Number. |
| **Business Unit** | Business unit the company belongs to, if applicable. |

## Address tab

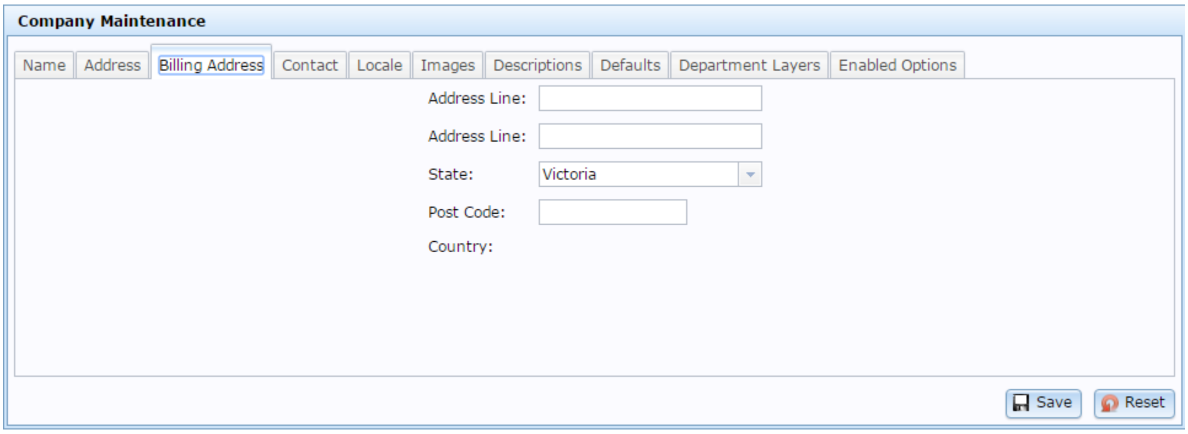
Use this area to define the company's postal address.




| Field | Description |
| --- | --- |
| **Address Line** | Company's postal address. |
| **State** | State your company's postal address is in. |
| **Post Code** | Post code of your company's postal address. |
| **Country** | Country your company operates in. |
| **Phone** | Contact phone numbers to reach your company's postal address. |
| **Fax** | Fax number to reach your company's postal address. |

## Billing Address tab

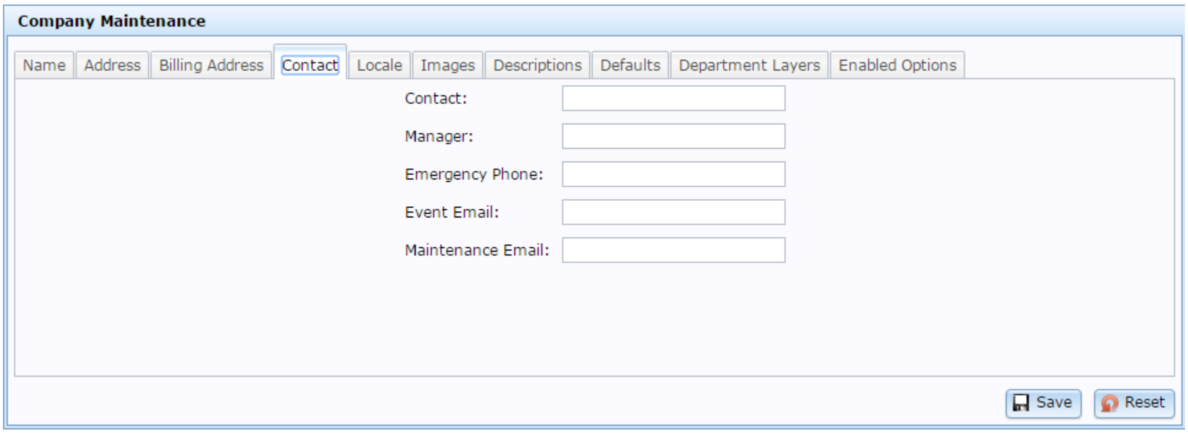
Use this area to define the company's billing address.




| Field | Description |
|---|---|
| **Address Line** | Company's billing address. |
| **State** | State your company's billing address is in. |
| **Post Code** | Post code of your company's billing address. |
| **Country** | Country your company operates in financially. |

## Contact tab

Use this area to define primary contacts for your company.

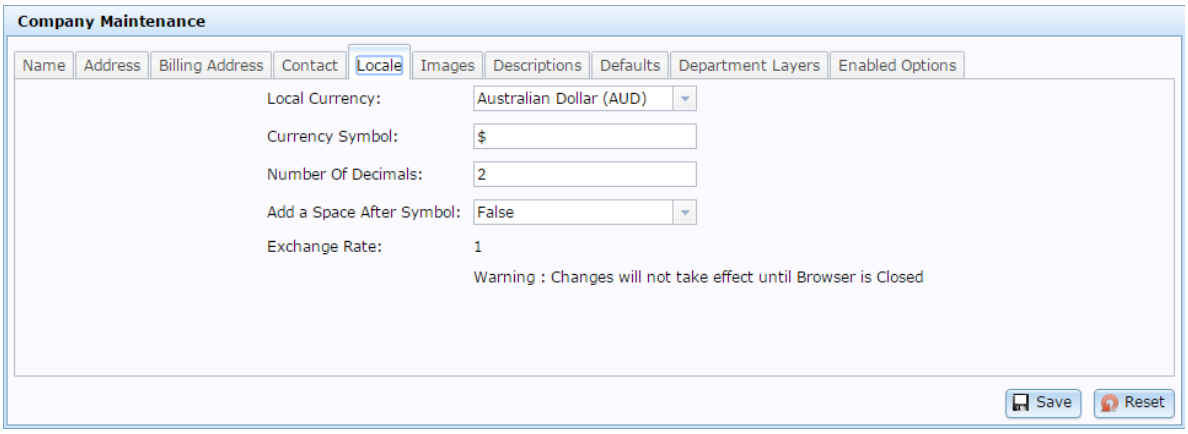



| Field | Description |
|---|---|
| **Contact** | Name of the primary point of contact for your company. |
| **Manager** | Name of the company manager. |
| **Emergency Phone** | Emergency contact phone number for your company. |
| **Event Email** | Email of the person who should be notified of Portal operations such as purchase order approval requests. |
| **Maintenance Email** | Email address to be used for debtor statements and industry forms. |

## Locale tab

Use this area to define the company's location, currency and language options.

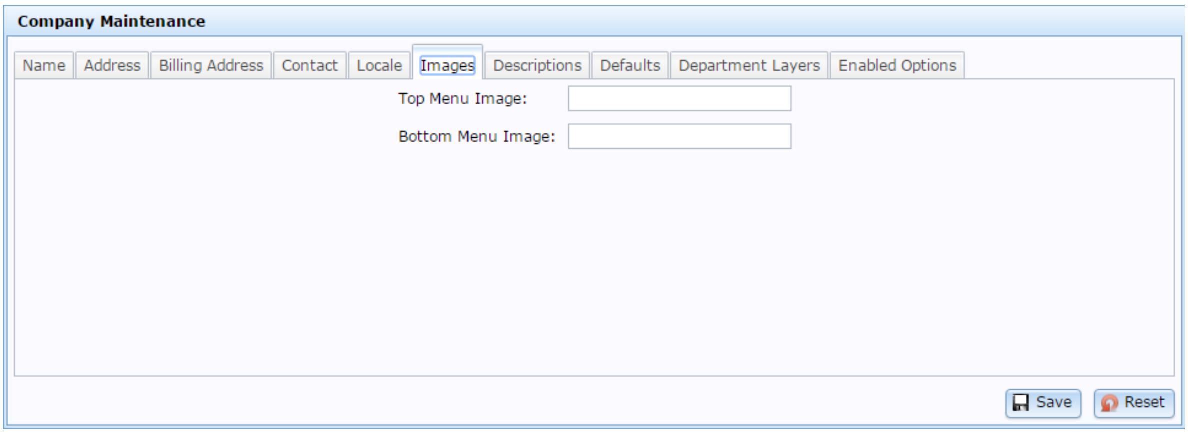
Company Maintenance screen




| Field | Description |
|---|---|
| **Local Currency** | Select the currency your company operates in. |
| **Currency Symbol** | Type the currency symbol the Portal should use. |
| **Number of Decimals** | Type the number of decimals to use for financial amounts. |
| **Add a Space After Symbol** | Select whether to add a space between the currency symbol and the financial amount. |
| **Exchange Rate** | This field ignored unless your Portal is configured for multi-currency mode. |

## Images tab

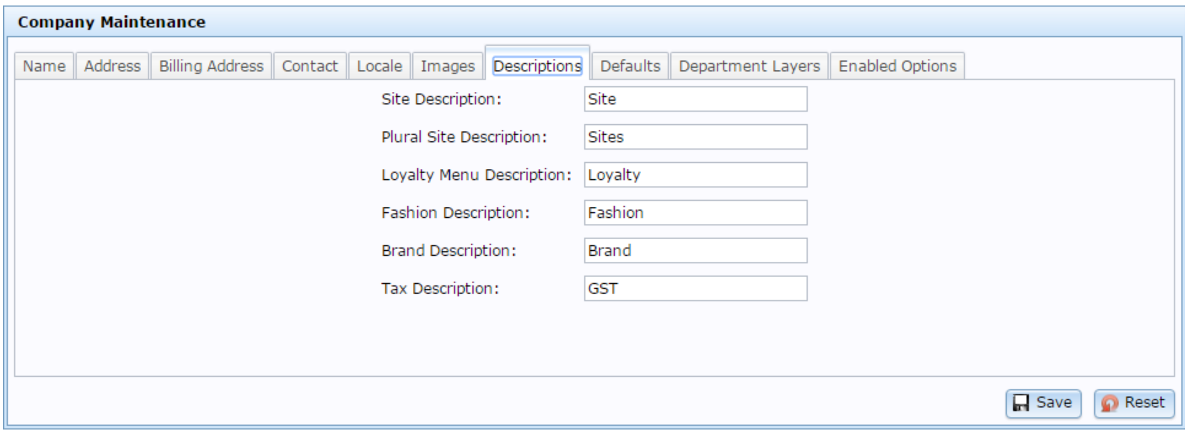
Use this area to define the images used as the Portal banners for specific Portal layouts.




| Field | Description |
|---|---|
| **Top Menu Image** | Type the name of the image to use as your header in the Portal web display.<br>**Note:** This is only used for side-menu Portal layouts. |
| **Bottom Menu Image** | Type the name of the image to use as your footer in the Portal web display.<br>**Note:** This is only used for side-menu Portal layouts. |

## Descriptions tab

Use this area to define the terms used for specific Portal concepts in the Portal.



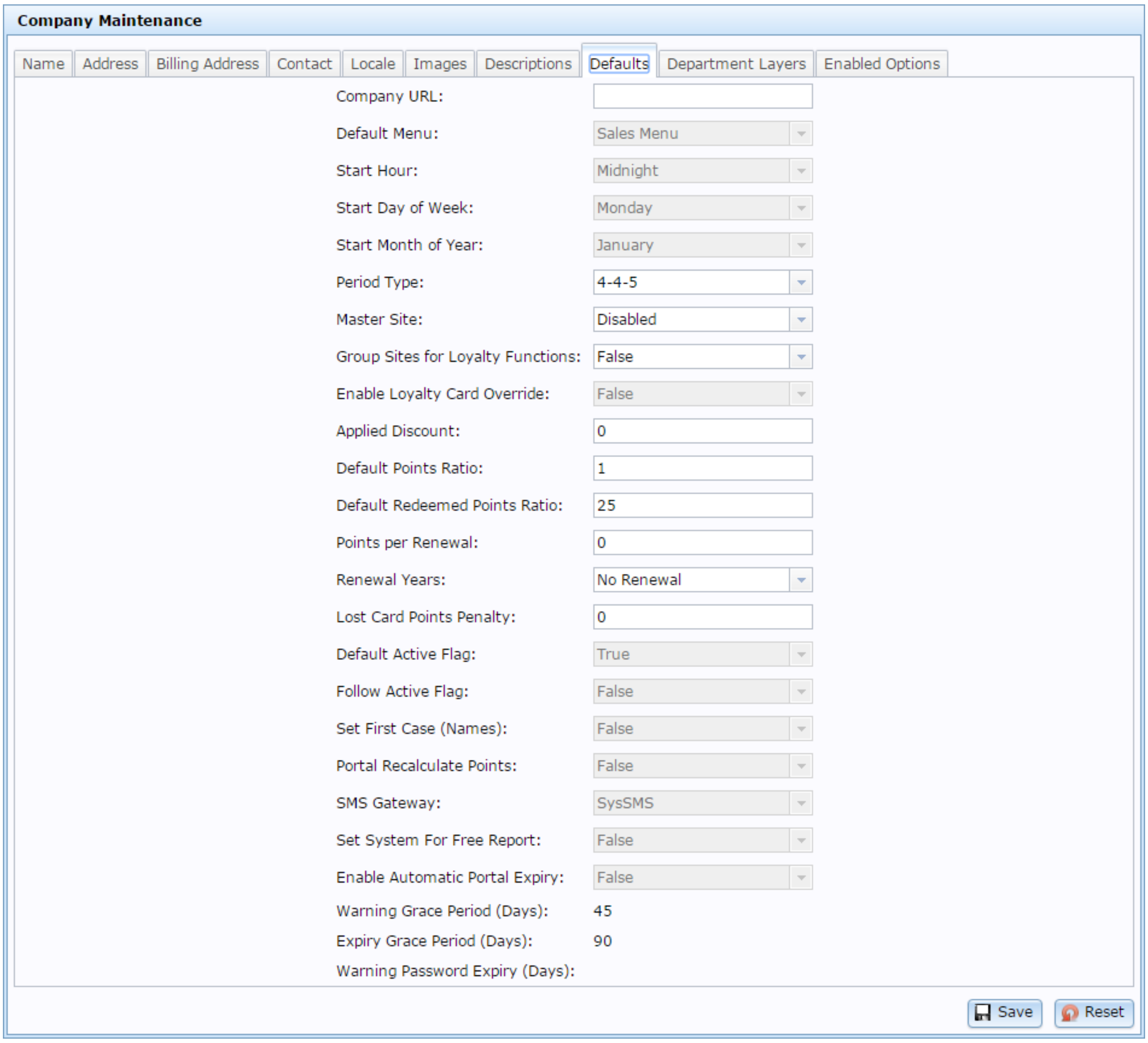
Company Maintenance
screen

| Field | Description |
|---|---|
| **Site Description** | Type the term you want the Portal to use in reports, menus and maintenance screens when referring to a single site. |
| **Plural Site Description** | Type the term you want the Portal to use in reports, menus and maintenance screens when referring to more than one site. |
| **Loyalty Menu Description** | Type the term you want the Portal to use in reports, menus and maintenance screens when referring to loyalty. |
| **Fashion Description** | Type the term you want the Portal to use in reports, menus and maintenance screens when referring to colour, size and style options.<br><br>**Note:** The terms used for colour, size and style can also be modified in the Fashion area of Company Options. See *Configuring item variations for your company* on page 65. |
| **Brand Description** | Type the term you want the Portal to use in reports, menus and maintenance screens when referring to a brand. |
| **Tax Description** | Type the term you want the Portal to use in reports, menus and maintenance screens when referring to tax. |

## Defaults tab

Use this area to define default behaviours such as loyalty defaults and calendar formats for your company.

**Note:** Some aspects can only be edited by AMC Convergent IT administrators.




| Field | Description |
|---|---|
| **Company URL** | The default page displayed on login for Portal users. Individual users can customise which page they display. |
| **Default Menu** | Select the default menu to open in sidebar Portal layouts. |
| **Start Hour** | Select the hour of the day to start the day on. |
| **Start Day of Week** | Select the day to start the week on. |

| | |
|---|---|
| **Start Month of Year** | Select the month to start the year on. |
| **Period Type** | How the year is split into periods for period reporting. The numbers represent groups of weeks.<br><br>4-4-5 — The first two periods are four weeks long, followed by a five-week period, then the cycle repeats. The exact date each period begins changes over leap years, and allows for week-to-week comparison between years.<br><br>4-5-4 — The first period is four weeks long, followed by a five-week period, then another four-week period, then the cycle repeats. The exact date each period begins changes over leap years, and allows for week-to-week comparison between years.<br><br>5-4-4 — The first period is five weeks long, followed by two four-week periods, then the cycle repeats. The exact date each period begins changes over leap years, and allows for week-to-week comparison between years.<br><br>Monthly — Each month is a new period. Periods begin and end on the same date each year, except in a leap year when the February period is a day longer.<br><br>Quarterly — Each three months is a new period. Periods begin and end on the same date each year, except in a leap year the when the quarter containing February is one day longer.<br><br>Manual — Manually set new periods using start and end dates. |
| **Master Site** | Select the site to act as the Head Office or master site. |
| **Group Sites for Loyalty Functions** | Select True to process loyalty points expiry across all sites. Select False to run loyalty points expiry individually per-site. |

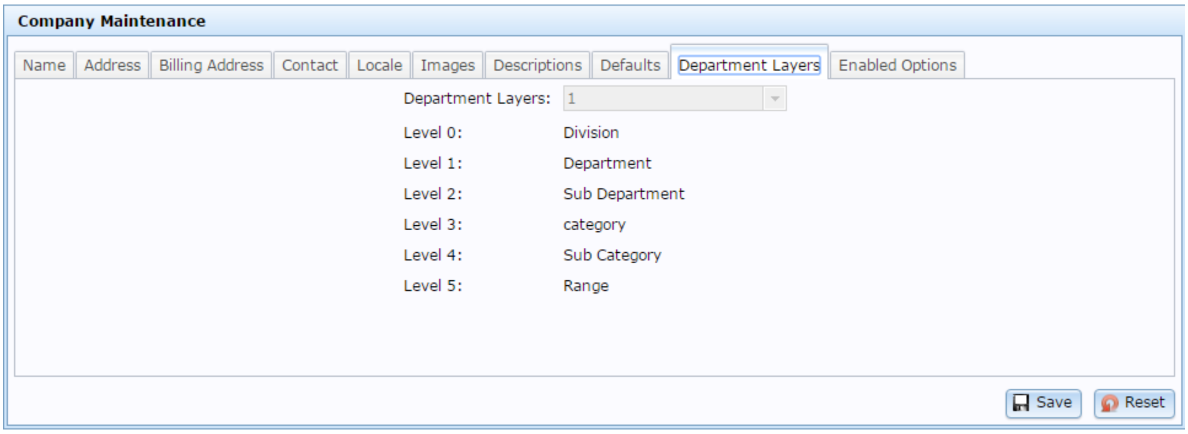
| | |
|---|---|
| **Enable Loyalty Card Override** | Select whether the points ratio is set at the card type level, instead of the card type group level. |
| **Applied Discount** | Type the percentage discount to apply to loyalty transactions by default. |
| **Default Points Ratio** | Type the number of points awarded per dollar in a transaction by default.<br>For example, if a loyalty member receives 3 points per dollar and spends $30, they are awarded 30 points. |
| **Default Redeemed Points Ratio** | Type the number of points a loyalty member redeems per dollar by default.<br>For example, if there are 100 redeem points per dollar, a loyalty member would have to redeem 1000 points to pay for a $10 transaction with loyalty points. |
| **Renewal Years** | The number of years a loyalty card is renewed for by default. |
| **Lost Card Points Penalty** | The default number of loyalty points deducted for replacing a lost card. |
| **Default Active Flag** | Select True to make loyalty cards active by default when they are first created. |
| **Follow Active Flag** | Select to default to requiring cards to be active in order to acquire or redeem points. |
| **Set First Case (Names)** | Select True to automatically convert the first letter of names to uppercase. For example, sam would become Sam. |

| | |
|---|---|
| **Portal Recalculate Points** | Select True if you want the Portal to calculate loyalty points instead of the Point of Sale. |
| **SMS Gateway** | Select the external system to be used to send SMS messages to loyalty members. |
| **Set System For Free Report** | Select True to enable limited reporting in preparation of migrating to full Portal reports. |
| **Enable Automatic Portal Expiry** | Select True to allow the Portal to automatically expire loyalty cards after their selected period. |
| **Warning Grace Period (Days)** | The number of days before a card expires that the Portal sends a warning regarding the expiry to the loyalty member. |
| **Expiry Grace Period (Days)** | The number of days after a card expires that the Portal allows it to be used. |
| **Warning Password Expiry (Days)** | The number of days before a password expires that the Portal sends a warning regarding the expiry to the loyalty member. |

## Department Layers tab

Use this area to view or define the names of the department layers your company uses.

**Note:** These cannot be edited once your Portal has been initialised.



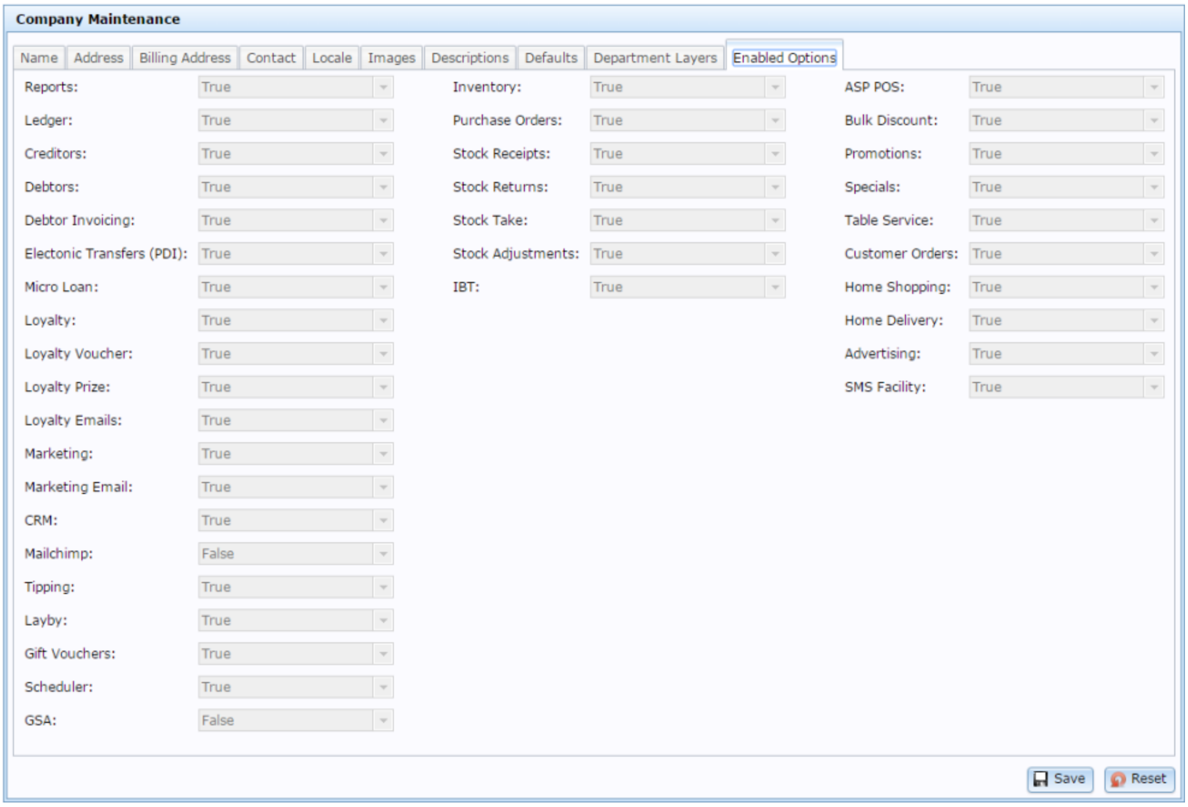

| Field | Description |
|---|---|
| **Department Layers** | The number of department levels used by your Portal.<br><br>For example, if the number of layers is 2, the Portal uses three department levels: Divisions, Departments and Sub Departments. See *Managing divisions and departments*. |
| **Level** | The name used by the Portal for each department layer. |

## Enabled Options tab

Use this area to view the Portal functions that are enabled for your company.

**Note:** Contact AMC Convergent IT if you want to enable or disable Portal features.

Company Maintenance screen




| Field | Description |
|---|---|
| **Reports** | Portal reporting. |
| **Ledger** | Financial ledgers. |
| **Creditors** | Managing creditor accounts. |
| **Debtors** | Managing debtor accounts. |
| **Debtor Invoicing** | Creating and managing debtor invoices. |
| **Electronic Transfers (PDI)** | Transfering purchase orders and stock receipts automatically between two companies on the same Portal. |

| | |
|---|---|
| **Micro Loan** | Micro loans. |
| **Loyalty** | Customer loyalty rewards program. |
| **Loyalty Voucher** | Creating and managing vouchers for customer loyalty rewards. |
| **Loyalty Prize** | Creating and managing prizes for customer loyalty rewards. |
| **Loyalty Emails** | Sending and managing emails for customer loyalty rewards. |
| **Marketing** | Marketing events and surveys. |
| **Marketing Email** | Sending and managing emails for marketing. |
| **CRM** | Customer relationship management. |
| **Mailchimp** | Integration with MailChimp's newsletter service. |
| **Tipping** | Footy tipping integration. |
| **Layby** | Creating and managing customer laybys. |
| **Gift Vouchers** | Creating and managing gift vouchers. |
| **Scheduler** | Scheduling service appointments. |

| | |
|---|---|
| **GSA** | Gambler's Subtle Assist. |
| **Inventory** | Managing items and inventory. |
| **Purchase Orders** | Creating and tracking purchase orders of new stock. |
| **Stock Receipts** | Receipting new stock into your inventory. |
| **Stock Returns** | Returning faulty, damaged or surplus stock to suppliers. |
| **Stock Take** | Maintaining accurate stock levels. |
| **Stock Adjustment** | Adjusting stock levels for shrinkage, damaged or found stock. |
| **IBT** | Transfers of stock between sites within the same company. |
| **ASP POS** | Portal Point of Sale system. |
| **Bulk Discount** | Managing automatic discounts when customers purchase items in bulk. |
| **Promotions** | Creating promotions based on supplier, department or a group of items. |
| **Specials** | Creating price specials for a set period of time. |
| **Table Service** | Providing table service, including item modifications. |

| | |
|---|---|
| **Customer Orders** | Providing customer orders. |
| **Home Shopping** | Online shopping features. |
| **Home Delivery** | Delivery of purchased goods or services to the customer's address. |
| **Advertising** | VISION advertising. |
| **SMS Facility** | Sending SMS messages to customers. |

Company Maintenance screen

# Configuring clerk reports for your company

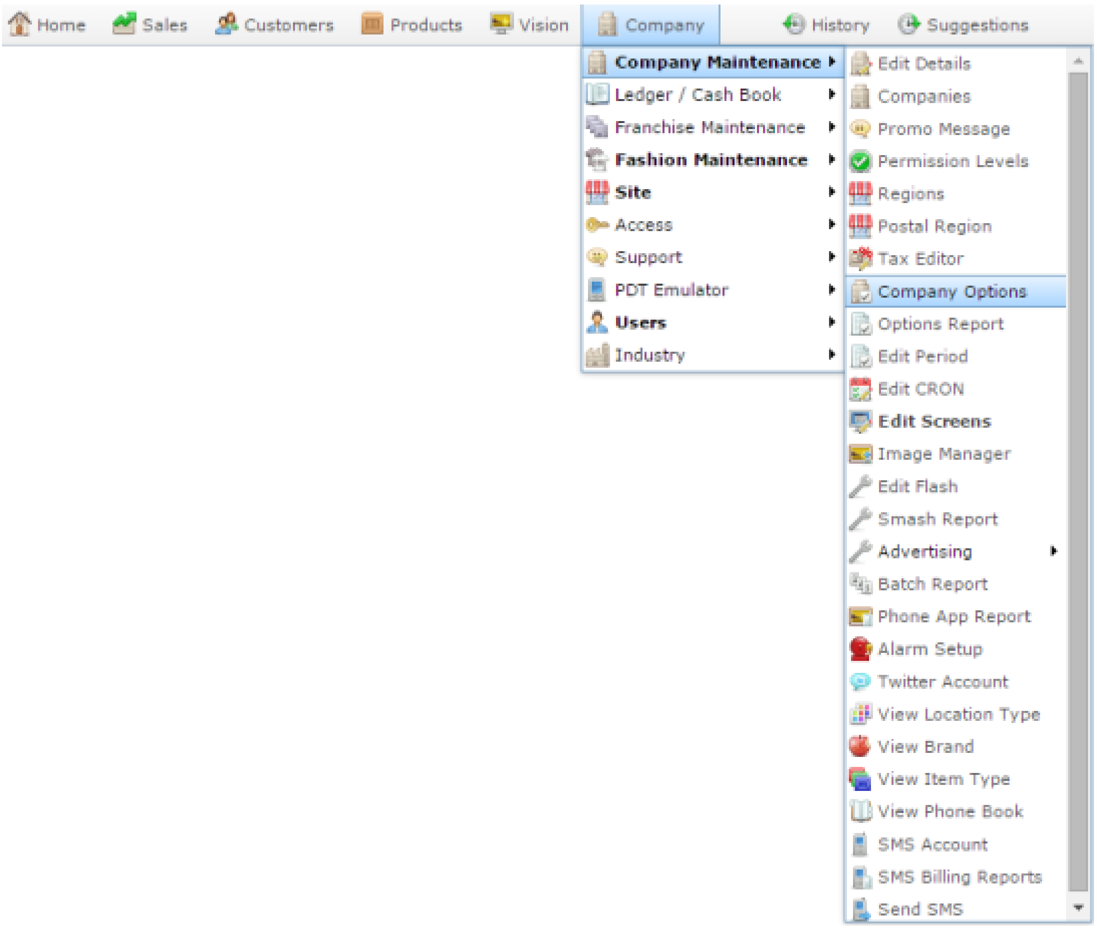
Use the Company Options - Clerk Report section to configure how cashier and operator reports are generated within the Portal.

## Opening the Company Options - Clerk Report section

To open the Company Options - Clerk Report section:

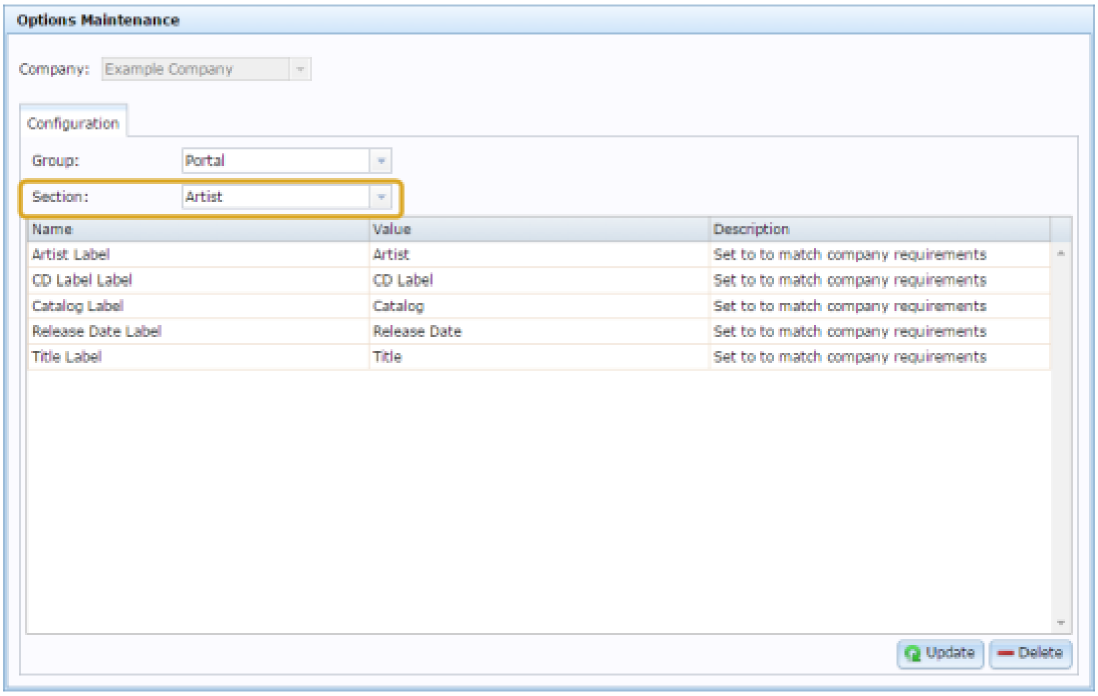
1. Press 

.
2. Press Company Maintenance > Company Options.



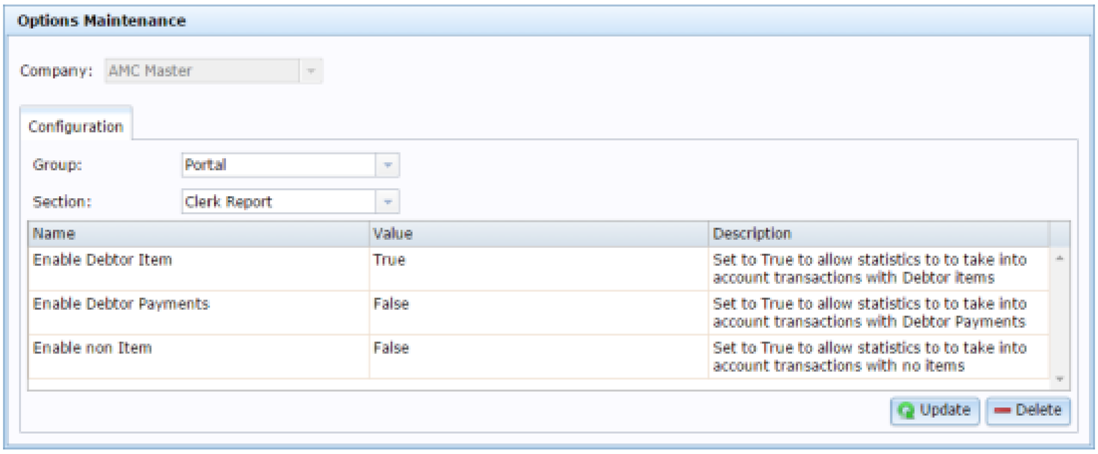

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.




4. Press Clerk Report from the Section drop-down list.

   The Clerk Report section is displayed.




For more information on Clerk Report, see *Site Cashier report*.

## Company Options - Clerk Report section key fields and buttons

| Field | Description |
|---|---|
| **Enable Debtor Item** | Type true if you want operator reports to include debtor payments. |
| **Enable Debtor Payments** | Type True if you want operator reports to include statistics from transactions that included debtor payments. |
| **Enable non Item** | Type True if you want operator reports to include statistics from transactions that did not contain items. |

# Configuring sales targets for your company

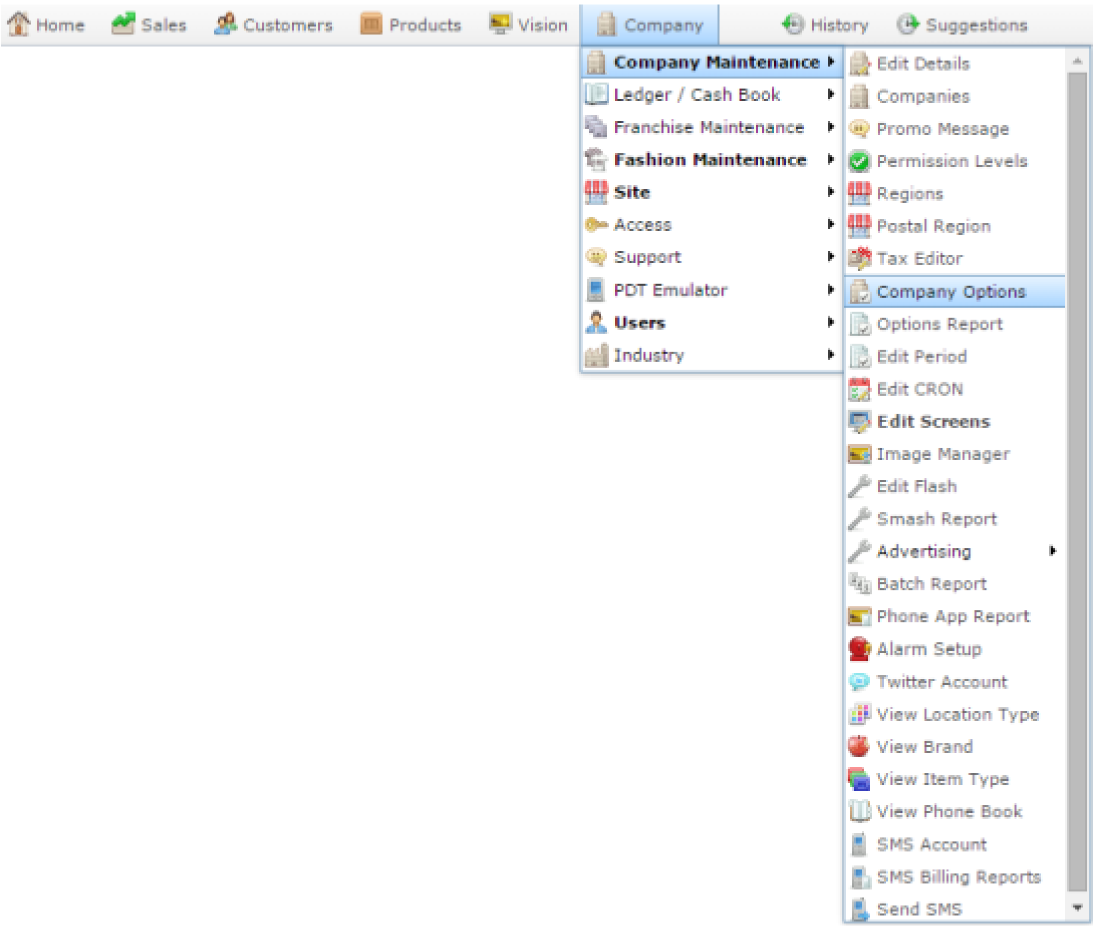
Use the Company Options - Sales Targets section to configure sales targets for your company.

## Opening the Company Options - Sales Targets section

To open the Company Options - Sales Targets section:

1. Press 

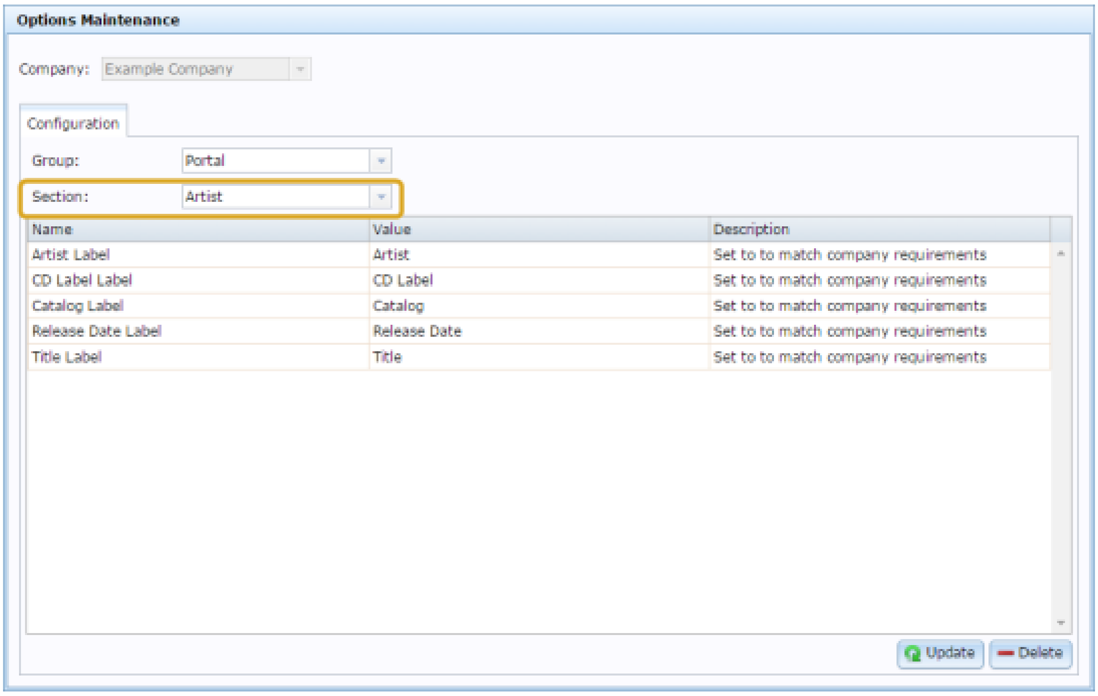
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

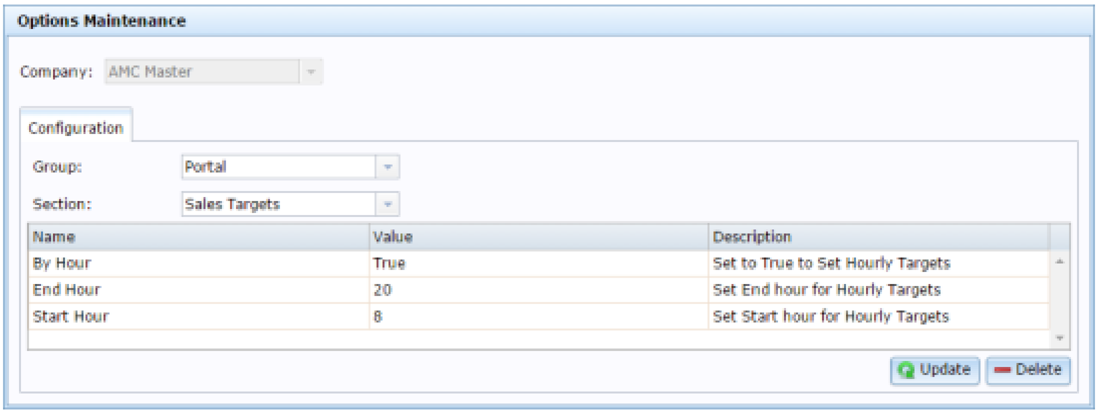
3. Open the Section drop-down list.

Company Maintenance screen




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

   The Sales Targets section is displayed.




For more information on sales targets, see *Sales Targets Maintenance screen*.

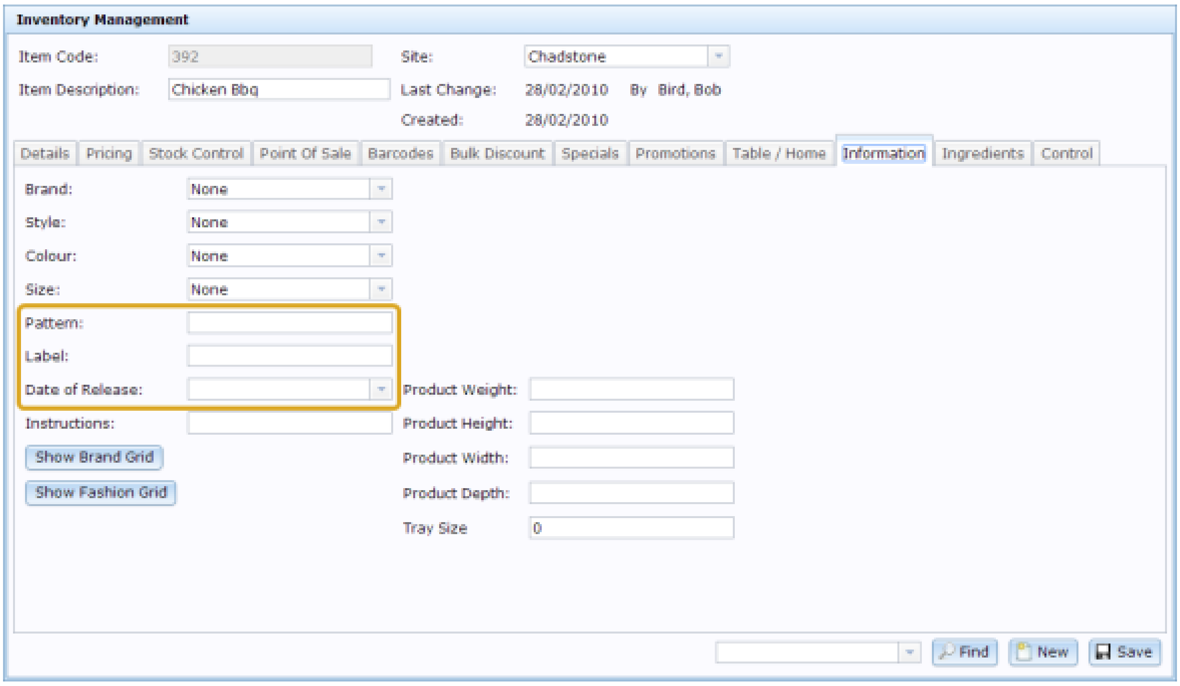
## Company Options - Sales Targets section key fields and buttons

| Field | Description |
|---|---|
| **By Hour** | Type True to set your sales targets by hour. Type False to set your sales targets for a day only. |
| **End Hour** | Type the hour your company trading ends for the purpose of sales targets.<br><br>**Note:** Time must be written as a whole number in 24-hour time. For example, if your store trading ends at 6pm, type **18**. |
| **Start Hour** | Type the hour your company trading starts for the purpose of sales targets.<br><br>**Note:** Time must be written as a whole number in 24-hour time. For example, if your store trading starts at 8am, type **8**. |

Company Maintenance
screen

# Configuring artist properties for your company

Use the Company Options - Artist section to rename specialist inventory fields for your company. These fields appear in the Information tab of each item's Inventory Maintenance screen, and can be renamed to a custom label.




**Note:** These fields are not used by any other areas of the Portal, so you can configure them to store whatever information you need.

The Portal provides four text fields and a date field that you can rename as needed. For example, a high-fashion clothing company may use:

- Designer name
- Season (Spring, Winter etc)
- Collection
- Material
- Release date

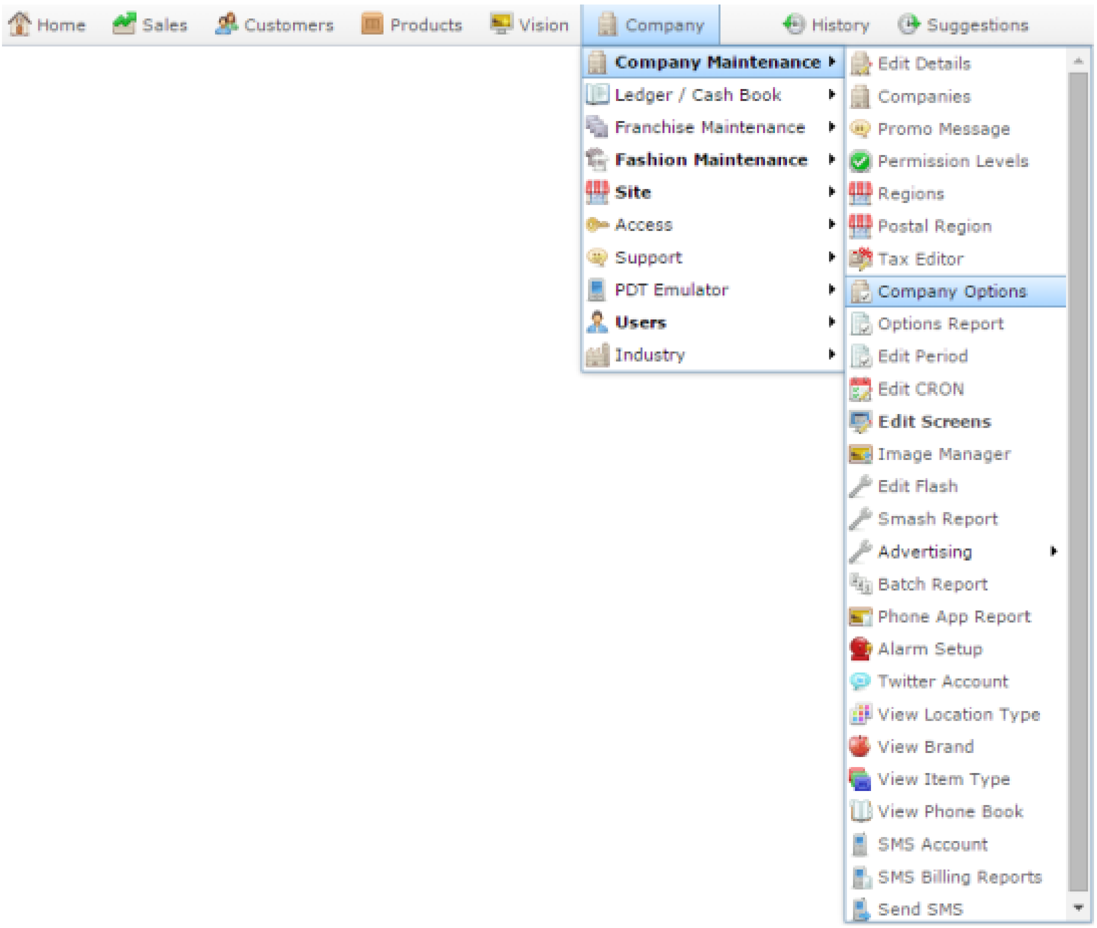
**Note:** These field labels apply to your whole inventory. For example, if you used the above field labels, you couldn't then rename the fields for some specific items. All items use these field names, although you don't need to fill in the fields for all items.

## Opening the Company Options - Artist section

To open the Company Options - Artist section:

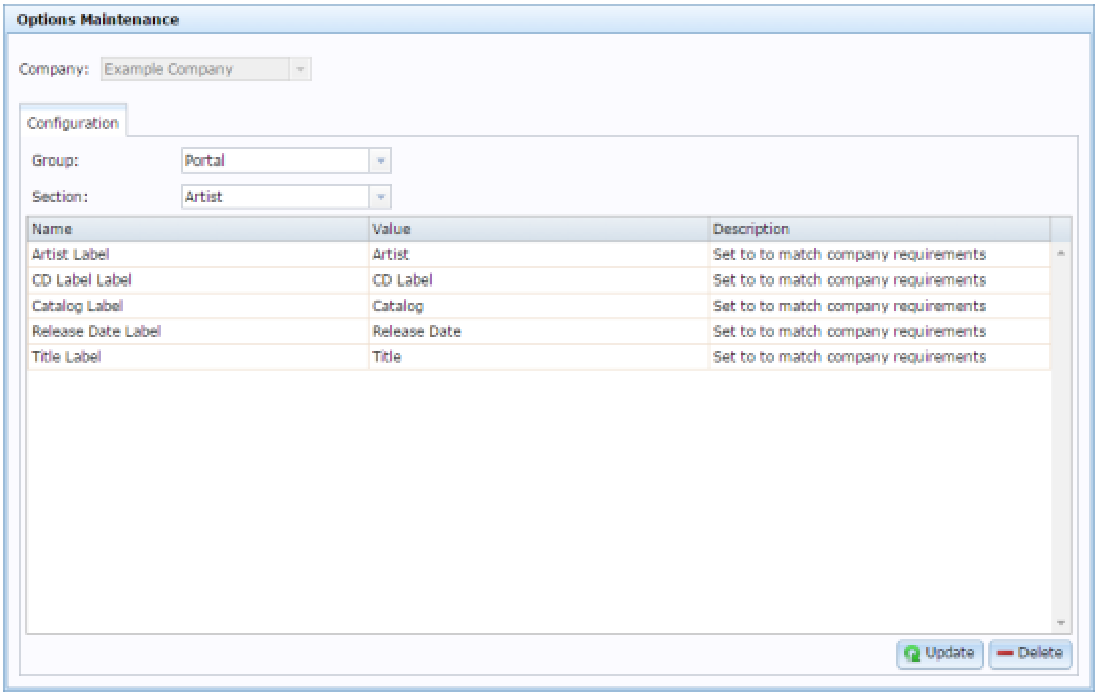
1. Press 

.
2. Press Company Maintenance > Company Options.

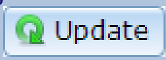



The Artist section of the Company Options screen is displayed.

Company Maintenance screen



## Company Options - Artist section key fields and buttons

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

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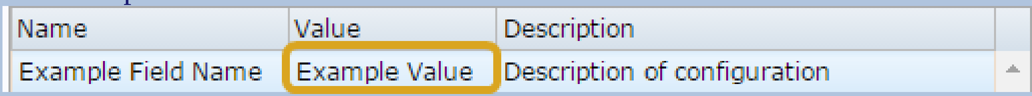



| Configuration | Description |
|---|---|
| **Artist Label** | Label name for a single line of text information. Rename to suit your inventory requirements by typing a new name into the Value field. |
| **CD Label Label** | Label name for a single line of text information. Rename to suit your inventory requirements by typing a new into the Value field. |
| **Catalog Label** | Label name for a single line of text information. Rename to suit your inventory requirements by typing a new name into the Value field. |
| **Release Date Label** | Label name for a date. Rename to suit your inventory requirements by typing a new name into the Value field. |

| Configuration | Description |
| --- | --- |
| **Title Label** | Label name for a single line of text information. Rename to suit your inventory requirements by typing a new name into the Value field. |

# Configuring balance reports for your company

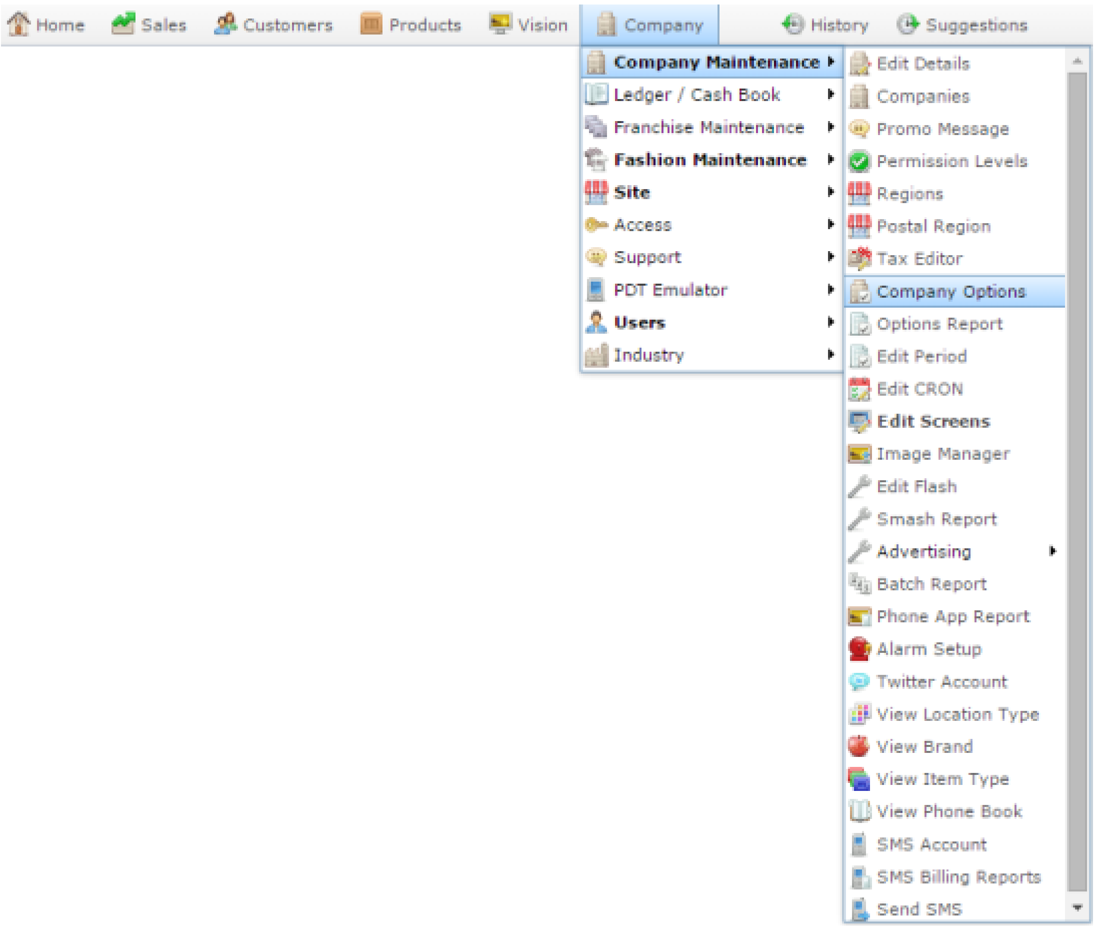
Use the Company Options - Balance Report section to configure your company's balance reports.

## Opening the Company Options - Balance Report section

To open the Company Options - Balance Report section:

1. Press 

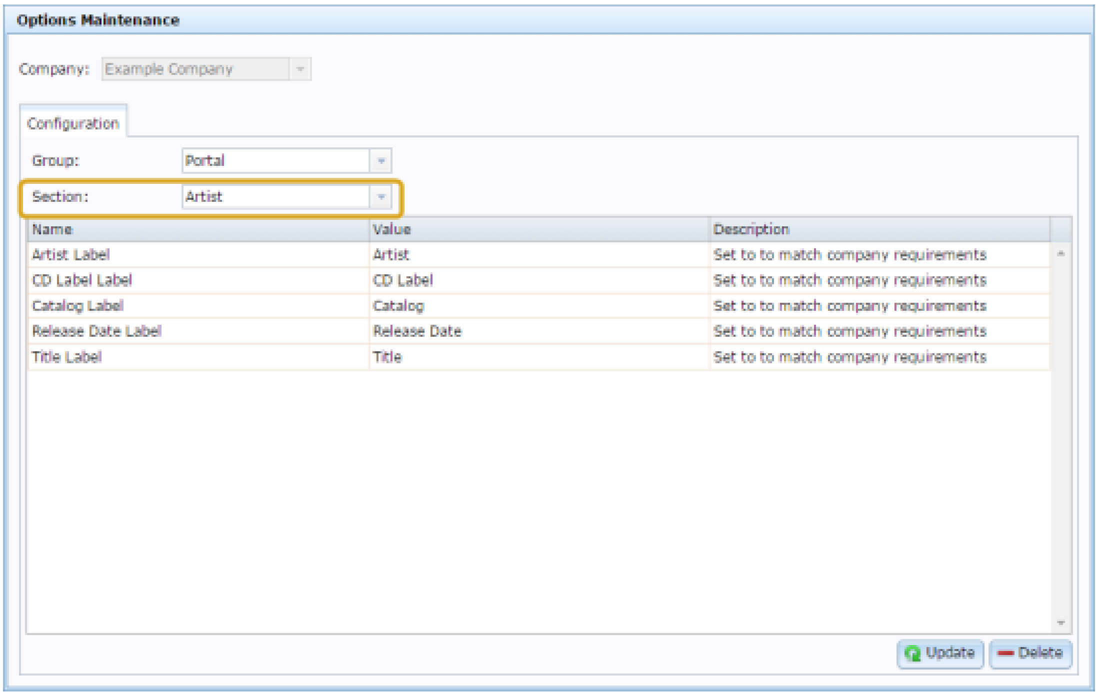
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

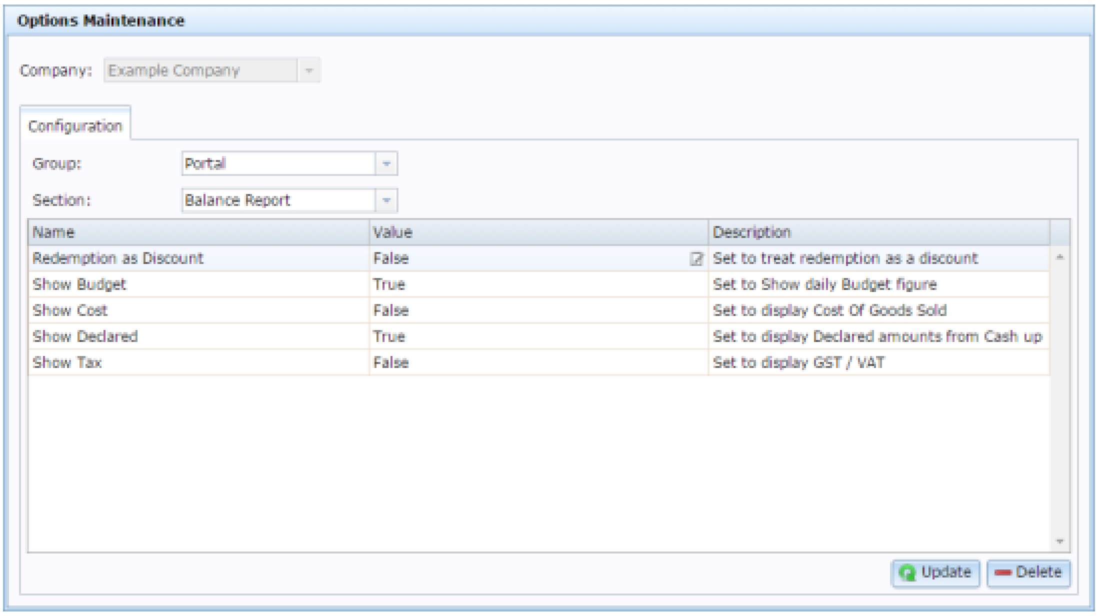
3. Open the Section drop-down list.

Company Maintenance screen

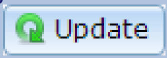



4. Select Balance Report from the Section drop-down list.

   The Balance Report section is displayed.



## Company Options - Balance Report  section key fields and buttons

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

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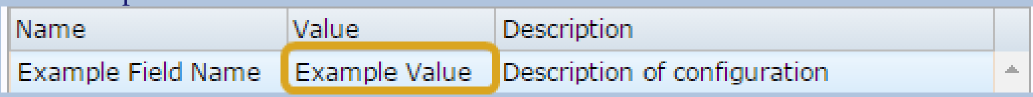



| Configuration | Description |
|---|---|
| **Redemption as Discount** | Type True to treat redemptions as discounts from the price on balance sheets, placing them on the same side as items.<br><br>When False, redemptions are listed as their own transaction line to balance the item sale. |
| **Show Budget** | Type True to display the daily budget figure in budget reports. |
| **Show Cost** | Type True to display the cost of goods sold in budget reports. |
| **Show Declared** | Type True to display the declared cash-up amounts in budget reports. |
| **Show Tax** | Type True to display GST or VAT amounts in budget reports. |

# Configuring creditors for your company

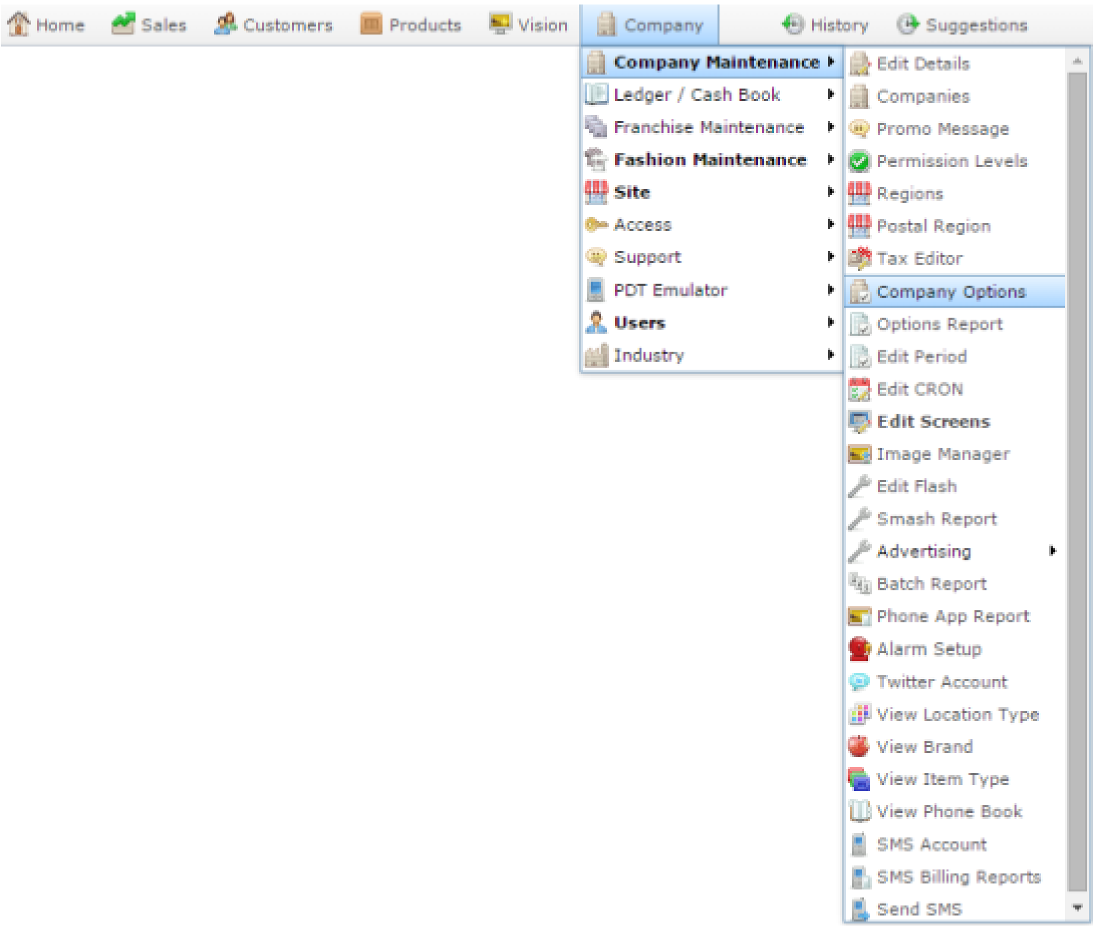
Use the Company Options - Creditors section to configure your company to manage creditors and suppliers.

## Opening the Company Options - Creditors section

To open the Company Options - Creditors section:

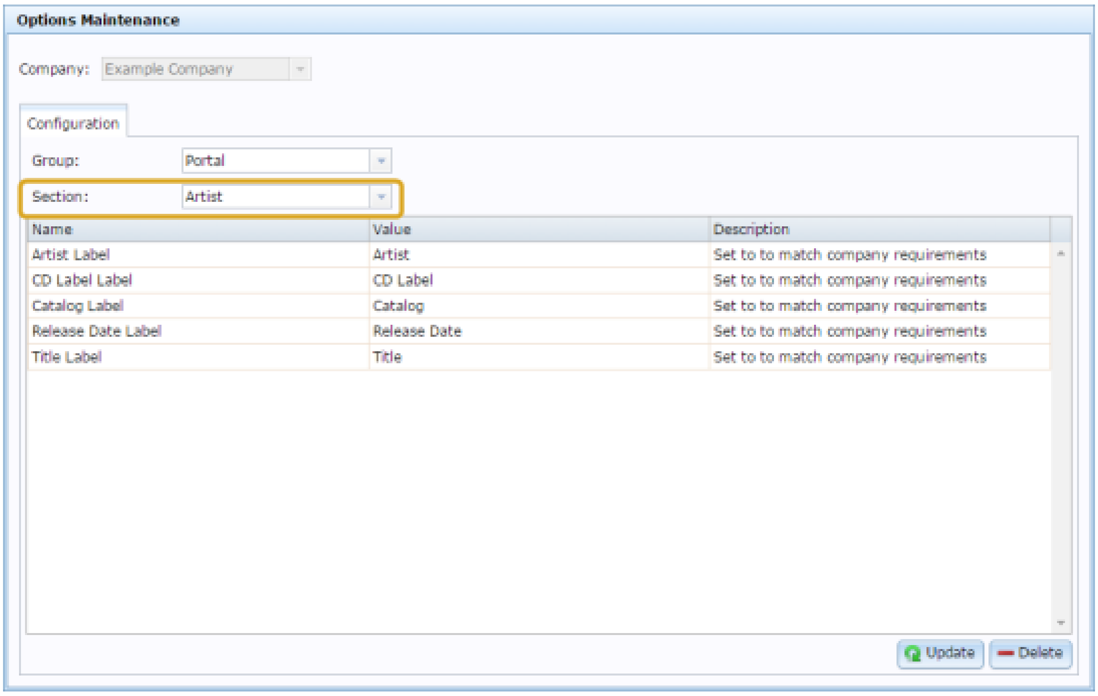
1. Press 

.
2. Press Company Maintenance > Company Options.



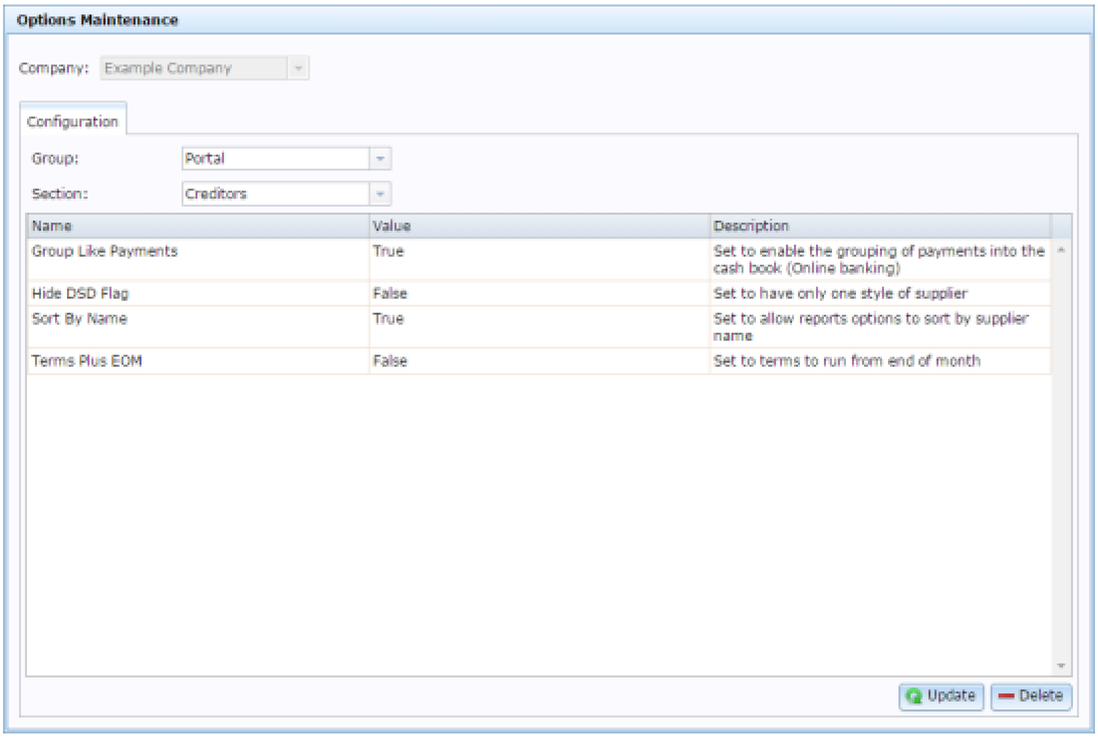

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.

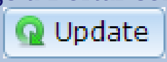



4. Select Creditors from the Section drop-down list.

   The Creditors section is displayed.



## Company Options - Creditors section key fields and buttons

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

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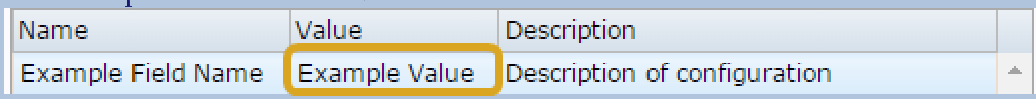



| Configuration | Description |
|---|---|
| **Group Like Payments** | Select to group multiple payments for a creditor into a single payment. |
| **Hide DSD Flag** | Select to remove the option to specify whether a creditor is a debtor or a warehouse supplier. |
| **Sort By Name** | Select to allow report options to sort by creditor name. |
| **Term Plus EOM** | Select if you want to automatically extend payment terms to run from the end of the month, rather than the specified date. |

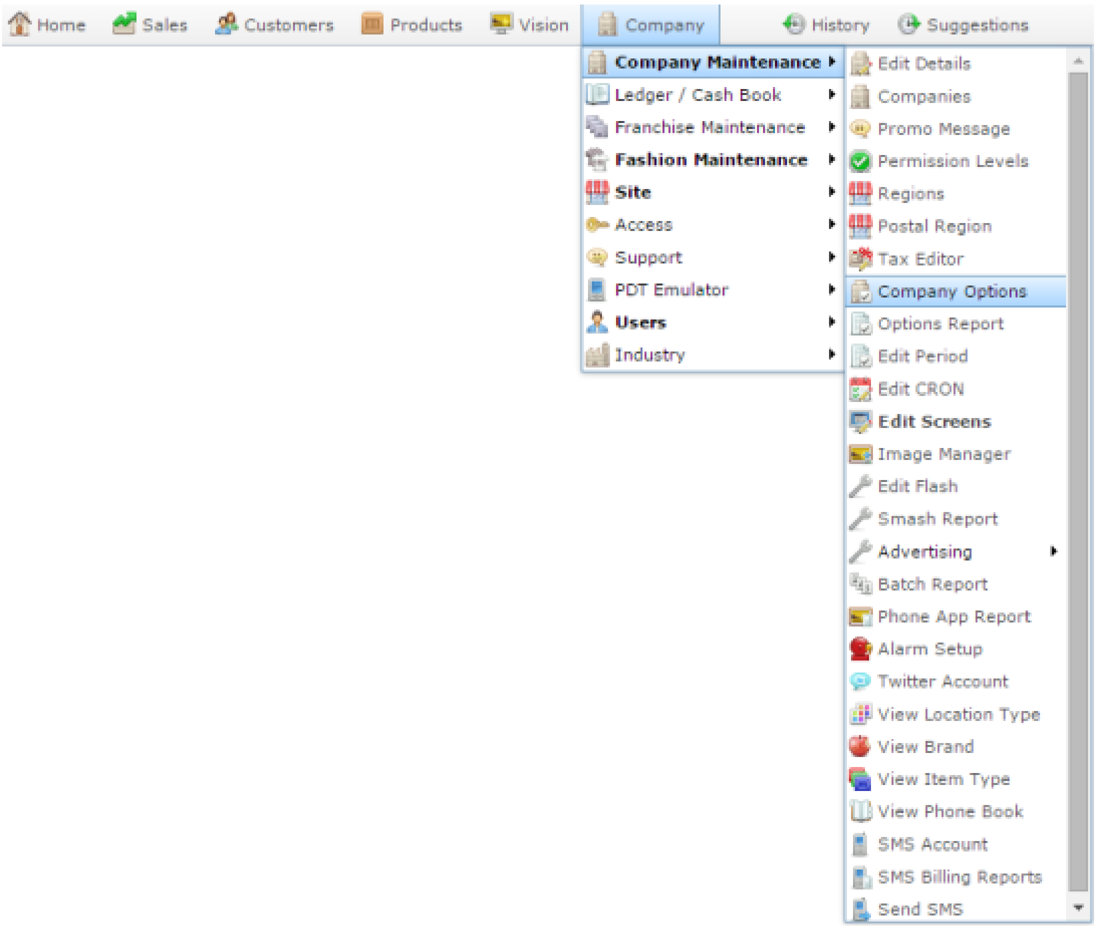
# Configuring your company for customer relations management

Use the Company Options - CRM Compulsory section to configure your company for customer relations management.

## Opening the Company Options - CRM Compulsory section

To open the Company Options - CRM Compulsory section:

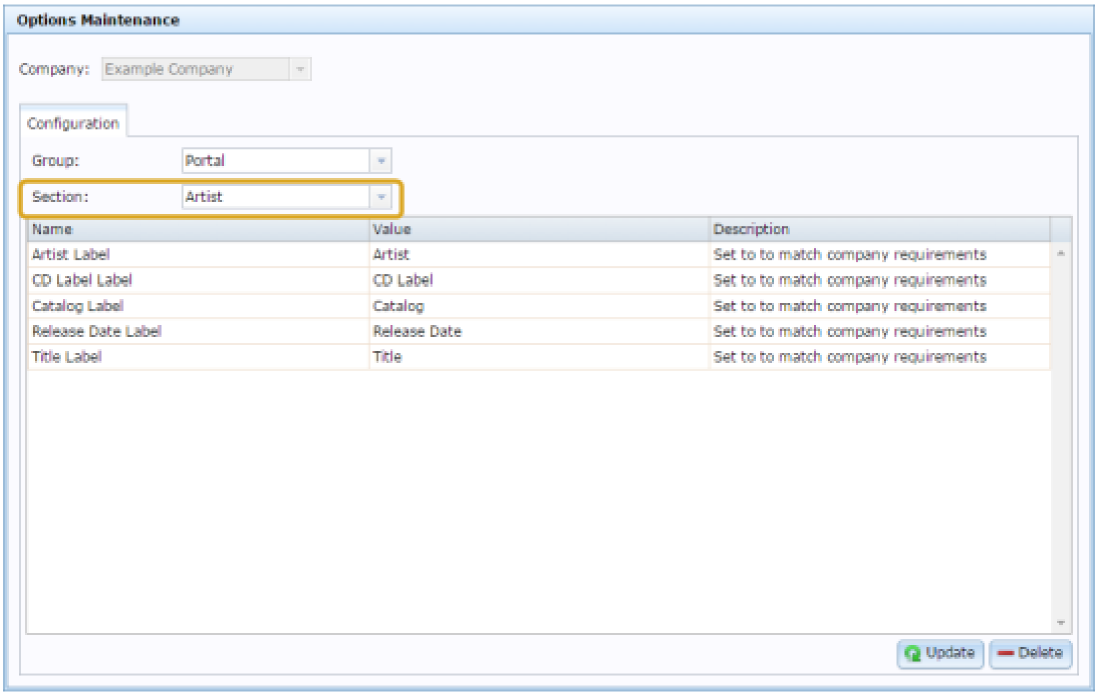
1. Press .
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

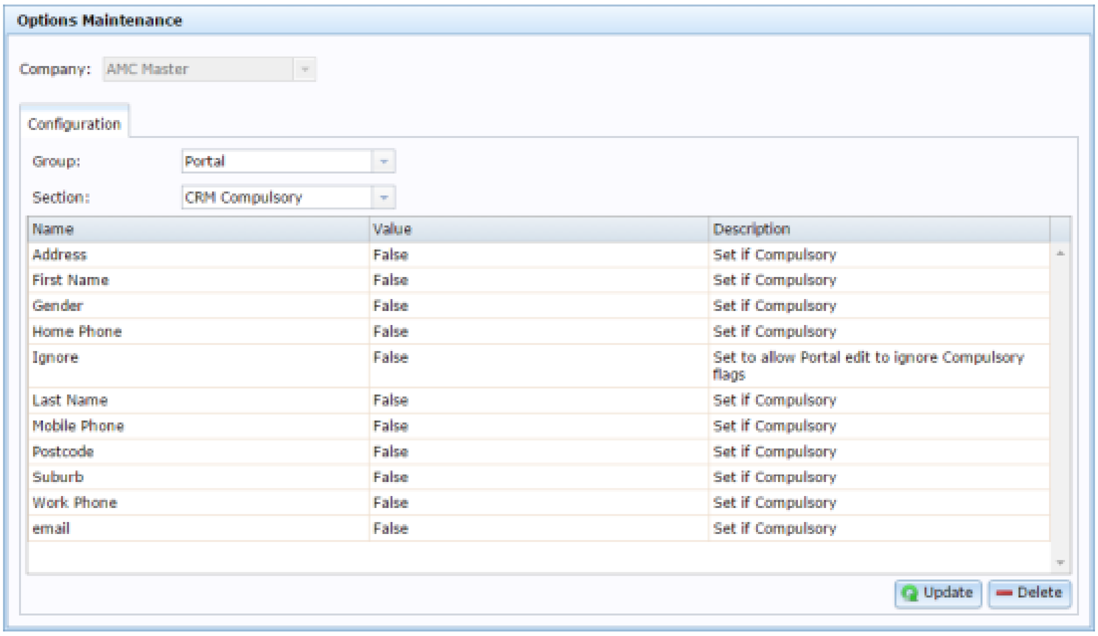
3. Open the Section drop-down list.

Company Maintenance screen




4. Press CRM Compulsory from the Section drop-down list.

   The CRM Compulsory section is displayed.



## Company Options - CRM Compulsory section key fields and buttons

| Field | Description |
|---|---|
| **Address** | Type True if the customer's address must be completed. |
| **First Name** | Type True if the customer's first name must be completed. |
| **Gender** | Type True if the customer's gender must be completed. |
| **Home Phone** | Type True if the customer's home phone number must be completed. |
| **Ignore** | Type True if Portal operators can ignore compulsory fields when they edit loyalty records through the Portal, for example edit a customer and delete an incorrect address, even though the address field is compulsory. |
| **Last Name** | Type True if the customer's last name must be completed. |
| **Mobile Phone** | Type True if the customer's mobile phone number must be completed. |

| Field | Description |
|---|---|
| **Occupation** | Type True if the customer's occupation must be completed. |
| **Postcode** | Type True if the customer's post code must be completed. |
| **Suburb** | Type True if the customer's suburb must be completed. |
| **Work Phone** | Type True if the customer's work phone number must be completed. |

# Configuring your company for customer orders

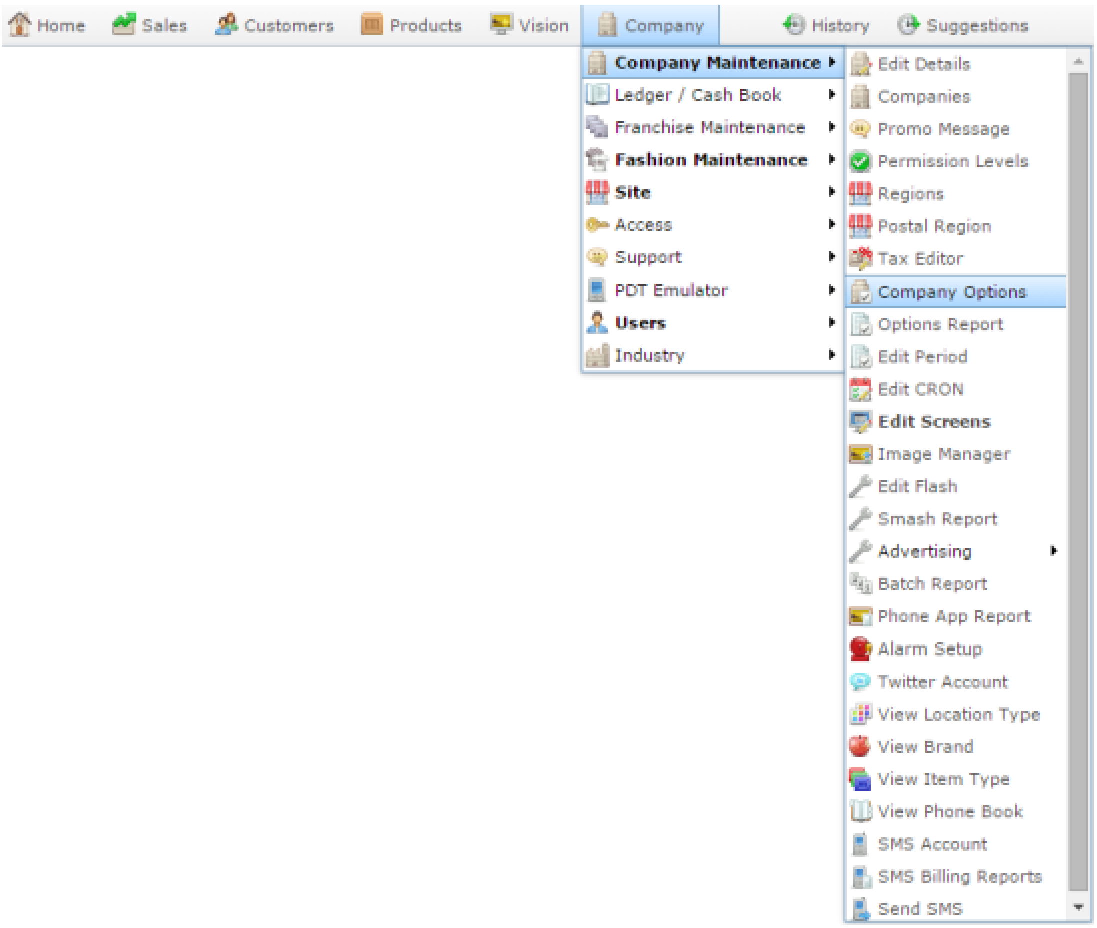
Use the Company Options - Customer Orders section to configure your company for customer orders.

## Opening the Company Options - Customer Orders section

To open the Company Options - Customer Orders section:

1. Press 

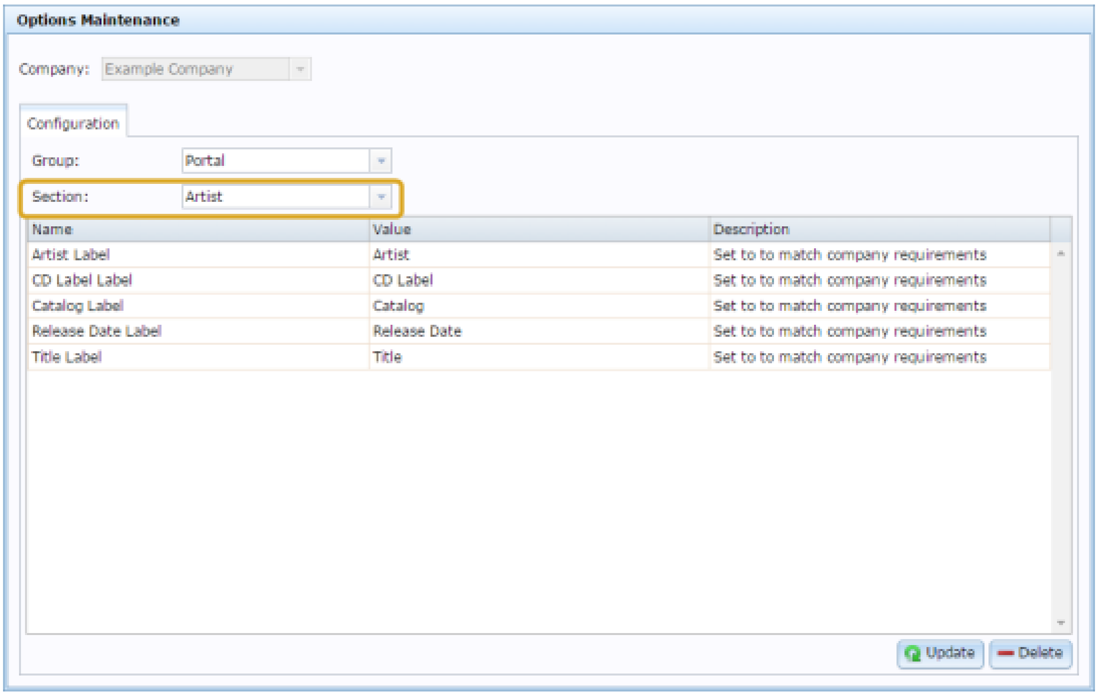
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

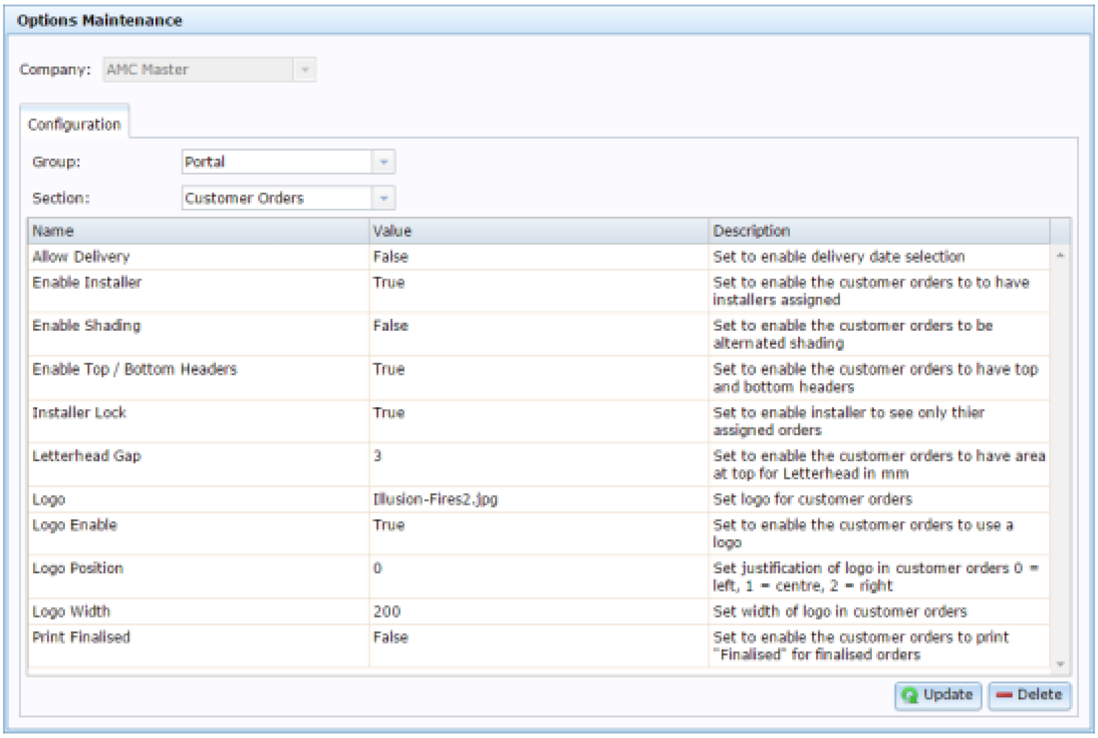
3. Open the Section drop-down list.

Company Maintenance screen




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

   The Customer Orders section is displayed.



## Company Options - Customer Orders section key fields and buttons

| Field | Description |
|---|---|
| **Allow Delivery** | Type True to allow delivery dates to be selected. |
| **Enable Installer** | Type True to allow installers to be assigned to deliveries. |
| **Enable Shading** | Type True to shade every second row of the printed purchase order.<br><br>**Note:** When enabled, this option increases the amount of ink used when printing purchase orders. |
| **Enable Top / Bottom Headers** | Type True to use a header and footer on the printed purchase order. |
| **Installer Lock** | Type True to restrict installers so they can only see their own assignments. |
| **Letterhead Gap** | Type the number of millimetres to leave as a gap at the top of the page for a letterhead.<br><br>For example, if your letterhead is 1.5 cm tall, and you want a 3 mm gap after it before the purchase order starts, type 18. |

| Field | Description |
|---|---|
| **Logo** | Type the name of the logo to print on the printed purchase order. |
| **Logo Enable** | Type True to use a logo on the printed purchase order. |
| **Logo Position** | Type the justification of the logo on the printed purchase order.<br><br>**0** left-justified.<br>**1** centered.<br>**2** right-justified. |
| **Logo Width** | Type the number of pixels the logo is wide. |
| **Print Finalised** | Type True to print the word "finalised" on finalised customer orders. |

# Configuring debtors for your company

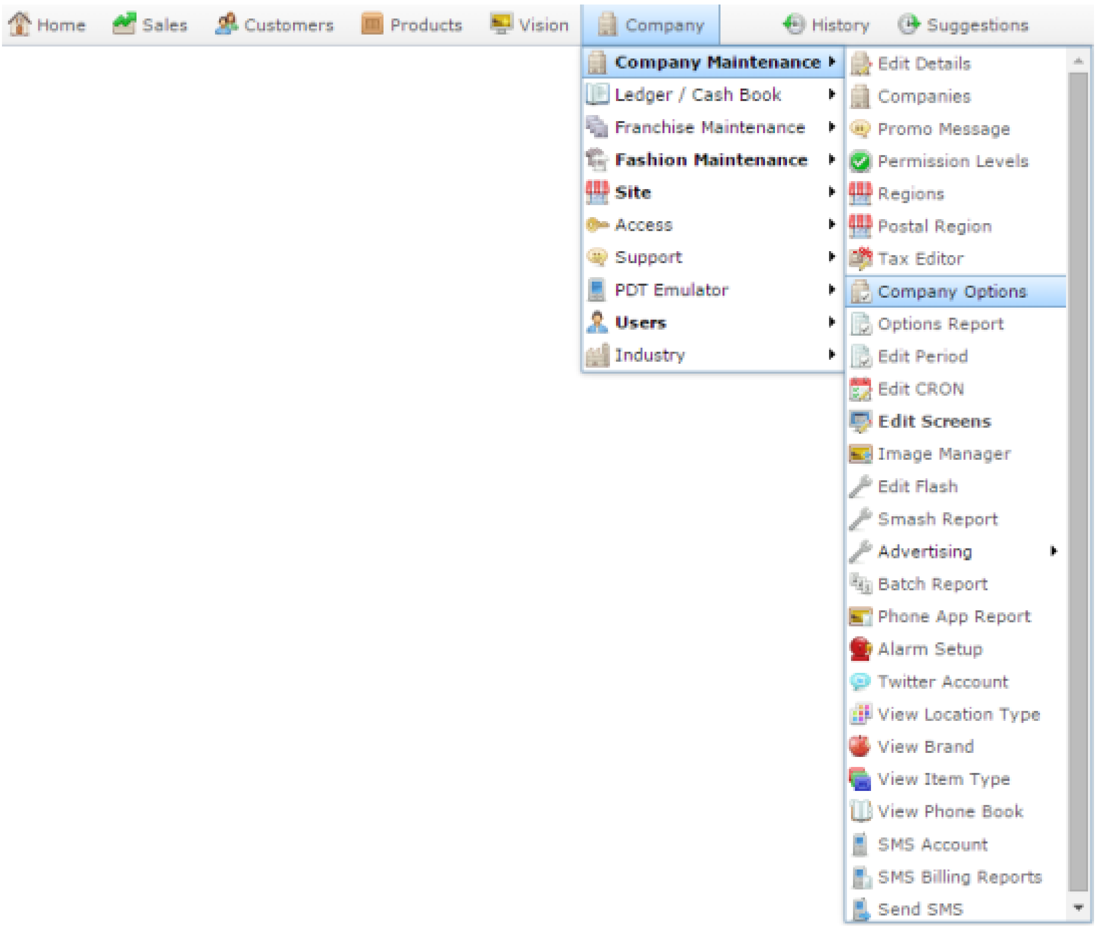
Use the Company Options - Debtors section to configure your company for debtor quotes, invoicing and management.

## Opening the Company Options - Debtors section

To open the Company Options - Debtors section:

1. Press 

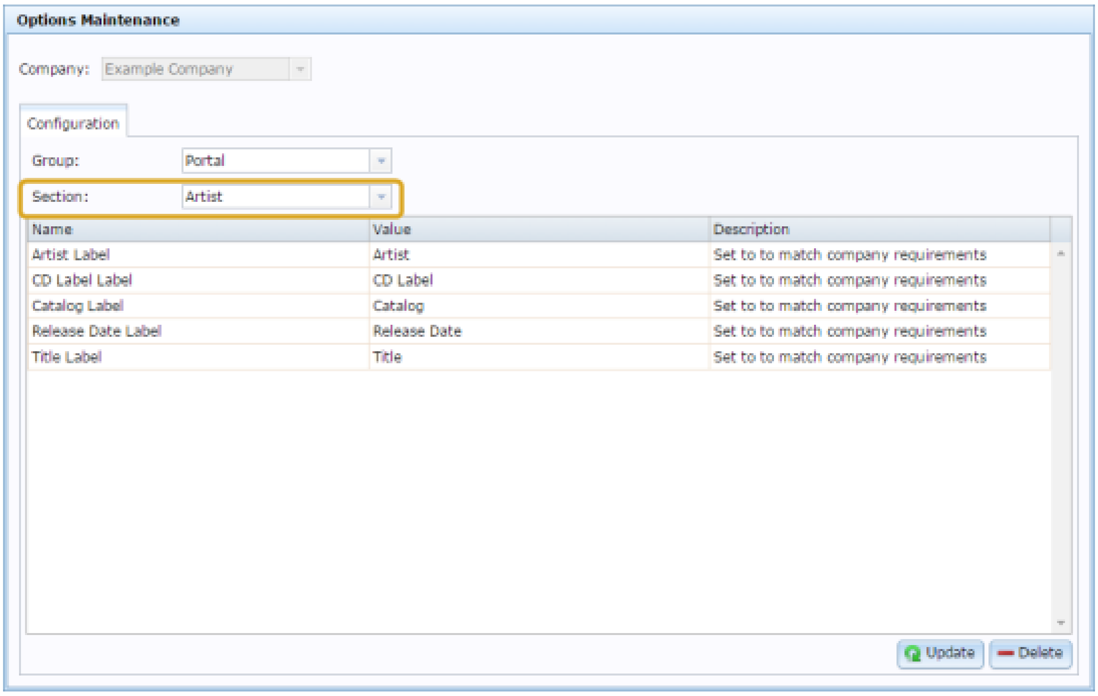
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

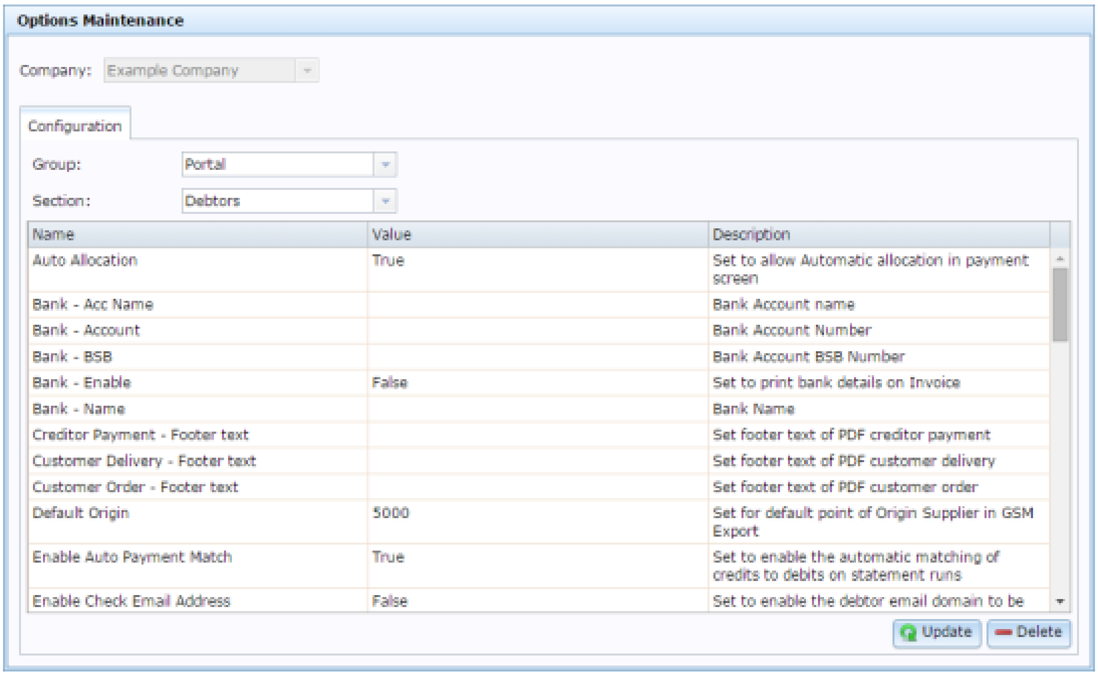
3. Open the Section drop-down list.

Company Maintenance screen

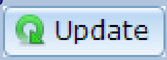



4. Select Debtors from the Section drop-down list.

   The Debtors section is displayed.



## Company Options - Debtors section key fields and buttons

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

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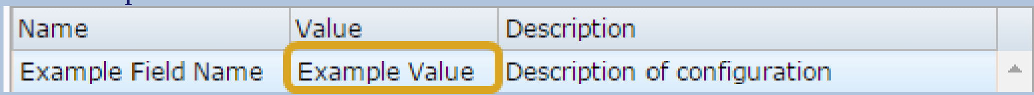



| Field | Description |
|---|---|
| **Allow Transaction Tab** | Type true to display the transaction tab, allowing Portal operators to create transactions in the Debtor Payment screen. |
| **Auto Allocation** | Type true to allow Portal operators to automatically allocate debtor payments to outstanding invoices using the Auto Allocate Payments button. |
| **Bank - Acc Name** | Type the account name to print on the debtor invoice. |
| **Bank - Account** | Type the bank account number to print on the debtor invoice. |
| **Bank - BSB** | Type the bank BSB details to print on the debtor invoice. |
| **Bank - Enable** | Type true to print bank details on debtor invoices. |

| Field | Description |
|---|---|
| **Bank - Name** | Type the bank name to print on debtor invoices. |
| **Default Origin** | The account code for exporting to a GSM debtor system. |
| **Enable Auto Payment Match** | Type true if you want the portal to automatically match debtor payments to invoices. |
| **Enable Check Email Address** | Type true if you want to check that the debtor's email address comes from a valid website. |
| **Enable Consignment** | Type true to if you want to use the Portal's consignment or return authority features. |
| **Enable Correct Balance** | Type true to automatically recalculate the debtor's balance when a statement is created. |
| **Enable Display Currency** | Type true to display the currency symbols on debtor statements and invoices. |
| **Enable GSM** | Type true to use a GSM debtor system. |
| **Enable GSM Header** | Type true to include headers in your GSM export. |

| Field | Description |
|---|---|
| **Enable Item Number** | Type true to display item numbers on debtor statements. |
| **Enable Price Edit** | Type true to allow the operator to change item prices when creating debtor invoices or quotes. |
| **Enable Wet Tax** | Type true if you need to use a liquor tax when selling alcohol. |
| **Force ID** | Type true to require a number identifying the customer for all quotes and invoices. This means all prospective customers must have debtor accounts created in the Portal in order to issue a quote. |
| **Force Unique ID** | Type true to require the numbers identifying customers to be unique. |
| **Freight GST Rate** | Type the percentage of Goods and Services Tax (GST) charged for freight fees. |
| **Invoice Footer text** | Type the text to appear on the footer of debtor invoices. |
| **Invoice - Footer text (2)** | This configuration setting is no longer used. |

| Field | Description |
|---|---|
| **Invoice Enable Top / Bottom Headers** | Type true to print headers and footers on debtor invoices. |
| **Invoice Letterhead Gap** | Type the number of mm to leave at the top of debtor invoices for the letterhead. |
| **Logo** | Type the file name of the logo to print on debtor invoices, quotes and statements. |
| **Logo Enable** | Type true to print the logo on debtor invoices, quotes and statements. |
| **Logo Position** | Type the code relating to where the logo should be positioned on the debtor invoices, quotes and statements:<br>**0** Align the logo against the left side.<br>**1** Centre the logo.<br>**2** Align the logo on the right side. |
| **Logo Width** | Type the number of pixels wide the logo should be printed. |

| Field | Description |
|---|---|
| **Max Length ID** | Type the maximum number of digits a customer ID can have. |
| **Min Length ID** | Type the minimum number of digits a customer ID must have. |
| **Order Link** | Type true if you want to automatically finalise a customer order when the related debtor invoice is finalised. |
| **Payment - Footer text** | Type the text to appear in the footer of debtor payments. |
| **Show Credit Limit** | Type true to display the debtor's credit limit on the debtor statement. |
| **Statement Aging** | Type true if you want debtor statements to show aged balances. |
| **Statement Bank - Acc Name** | Type the account name to print on the debtor statement. |
| **Statement Bank - Account** | Type the bank account number to print on the debtor statement. |
| **Statement Bank - BSB** | Type the bank BSB details to print on the debtor statement. |

| Field | Description |
| --- | --- |
| **Statement Bank - Enable** | Type true to print bank details on debtor statements. |
| **Statement Bank - Name** | Type the bank name to print on debtor statements. |
| **Statement Enable Landscape** | Type true to print statements in landscape mode. |
| **Statement Enable Shading** | Type true to shade alternate lines on debtor statements. |
| **Statement Enable Top / Bottom Headers** | Type true to print headers and footers on debtor statements. |
| **Statement Letterhead Gap** | Type the number of millimetres to leave at the top of debtor statements for the letterhead. |
| **Statement Paper Size** | Type the paper size your statements are printed on. |

# Configuring the default departments for your company

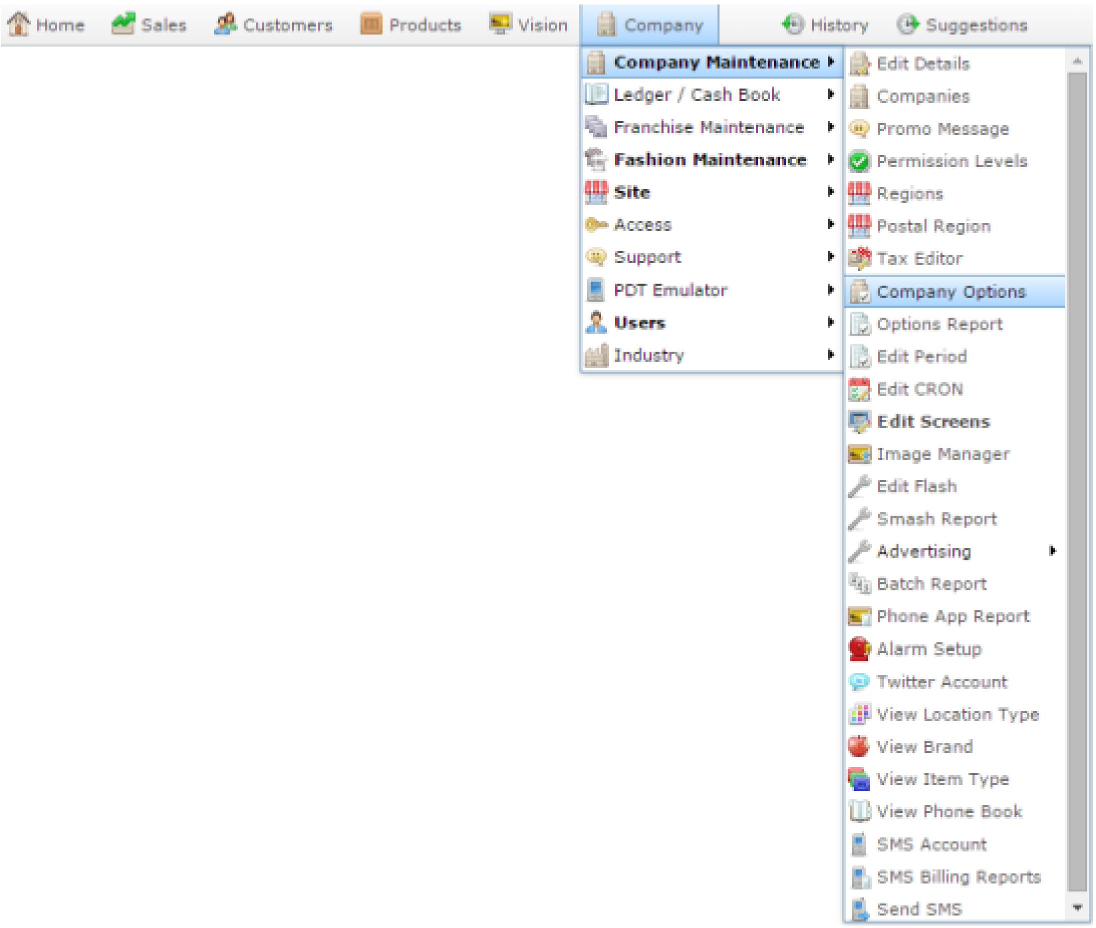
Use the Company Options - Default Departments section to configure the department codes and other configurations for default Portal departments such as gift vouchers and debtor payments.

## Opening the Company Options - Default Departments section

To open the Company Options - Default Departments section:

1. Press 

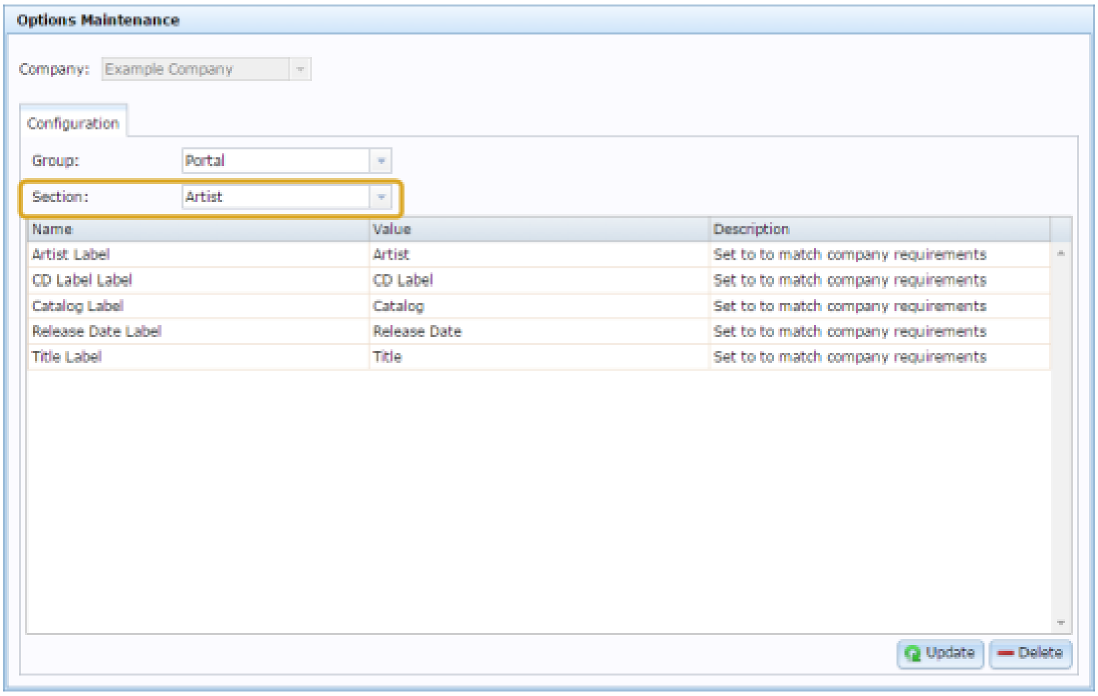
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

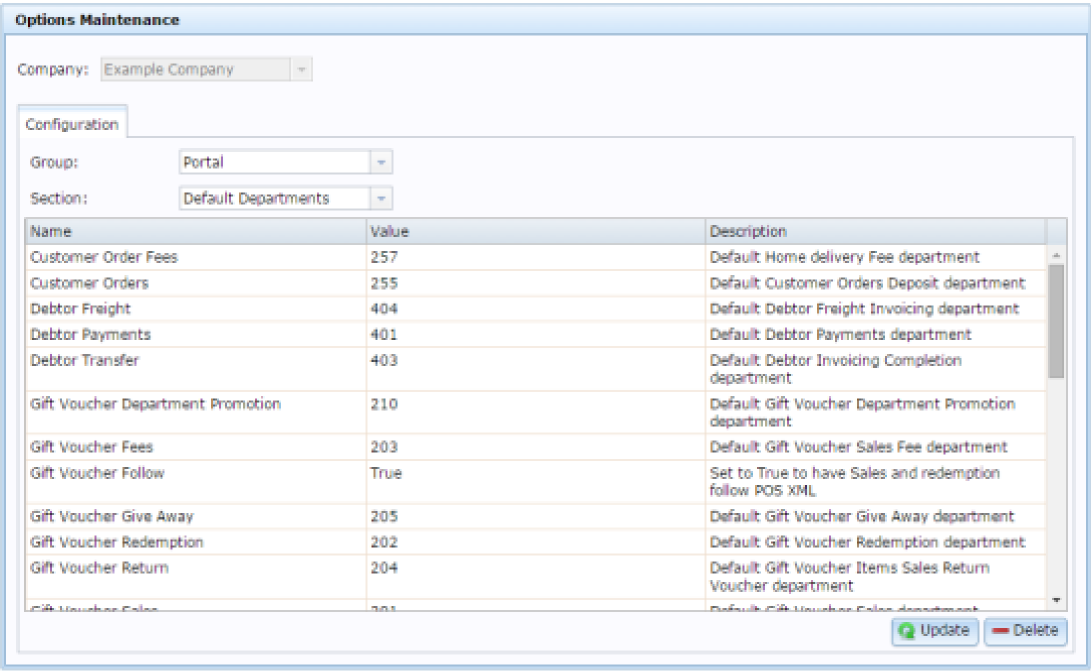
3. Open the Section drop-down list.

Company Maintenance screen




4. Select Default Departments from the Section drop-down list.

   The Default Departments section is displayed.

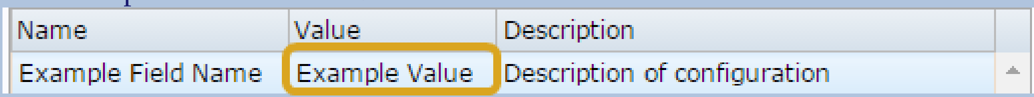


# Company Options - Default Departments section key fields and buttons

## Default department configurations

These define the departments used by specific Portal functions.

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




**Note:** You should not have to edit these department numbers.

| Configuration | Description |
| --- | --- |
| **Name** | The name of the default department. |
| **Value** | The department code to use. **Note:** This code must not conflict with any other department codes used, including inventory departments set up in Department maintenance. |
| **Description** | A guide to the purpose of this department. **Note:** You can edit or add to this description. |

Company Maintenance screen

# Configuring departments for your company

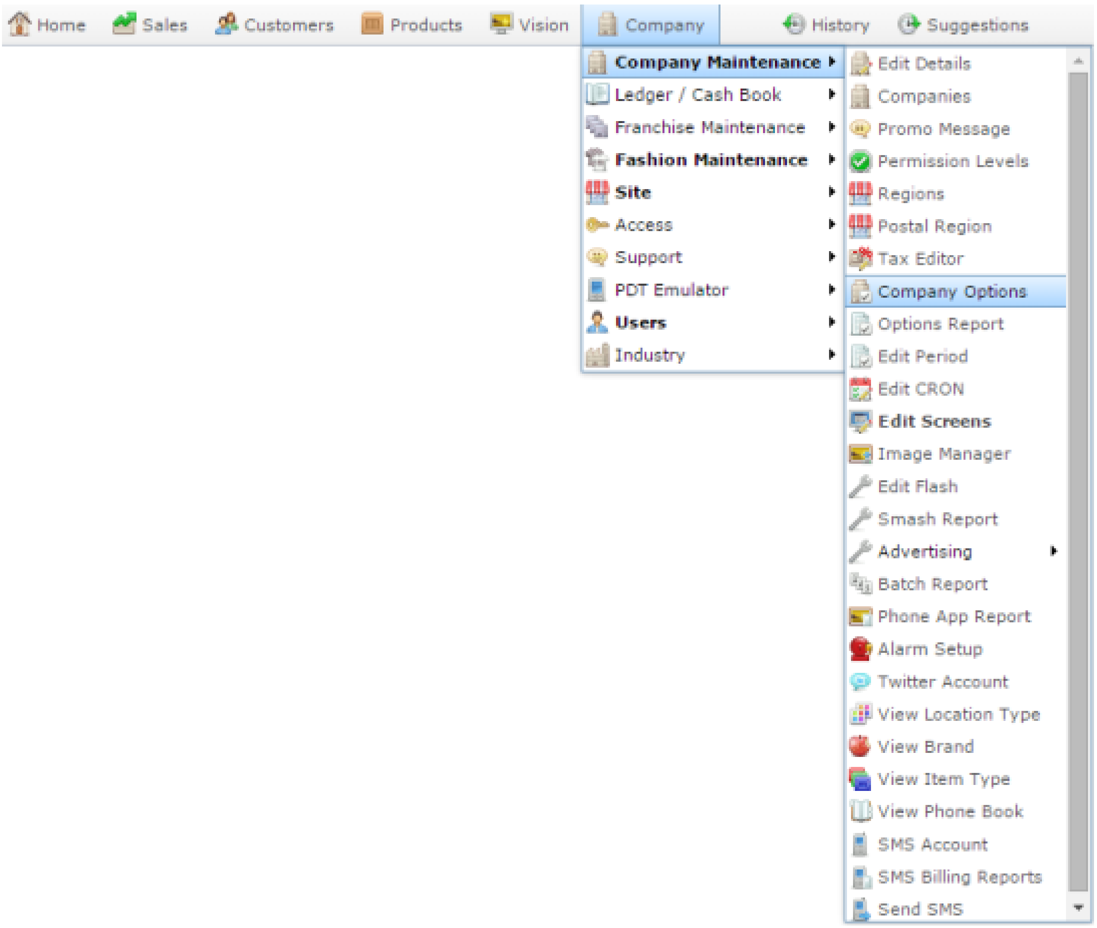
Use the Company Options - Departments section to configure how the Portal manages your company's inventory departments.

## Opening the Company Options - Departments section

To open the Company Options - Departments section:

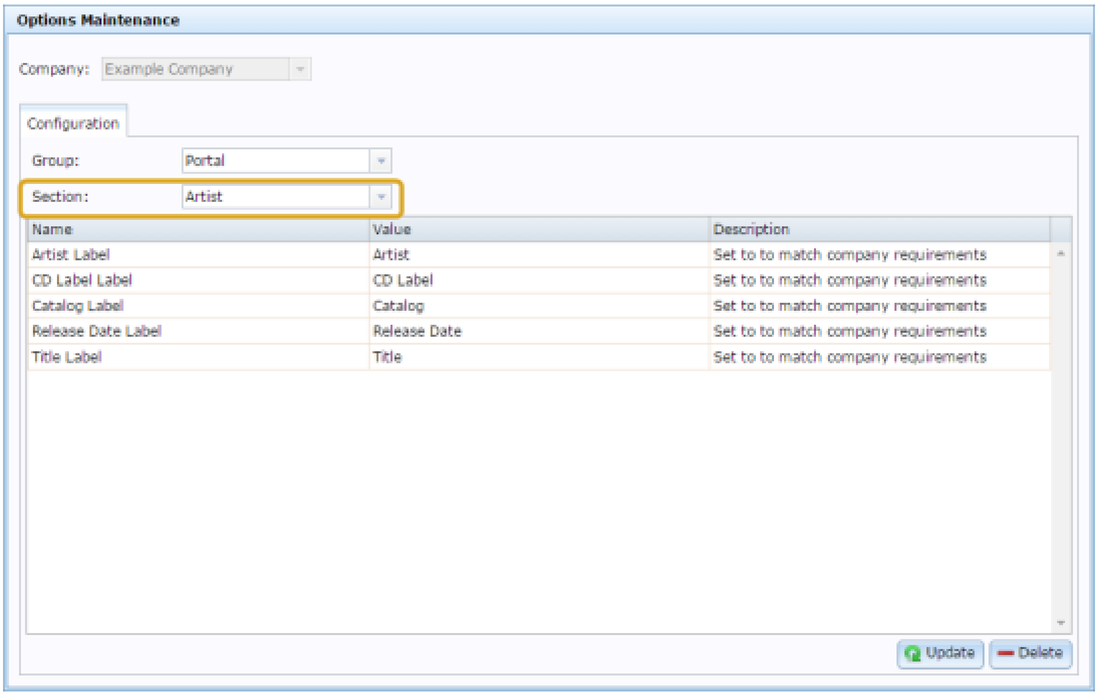
1. Press 

.
2. Press Company Maintenance > Company Options.



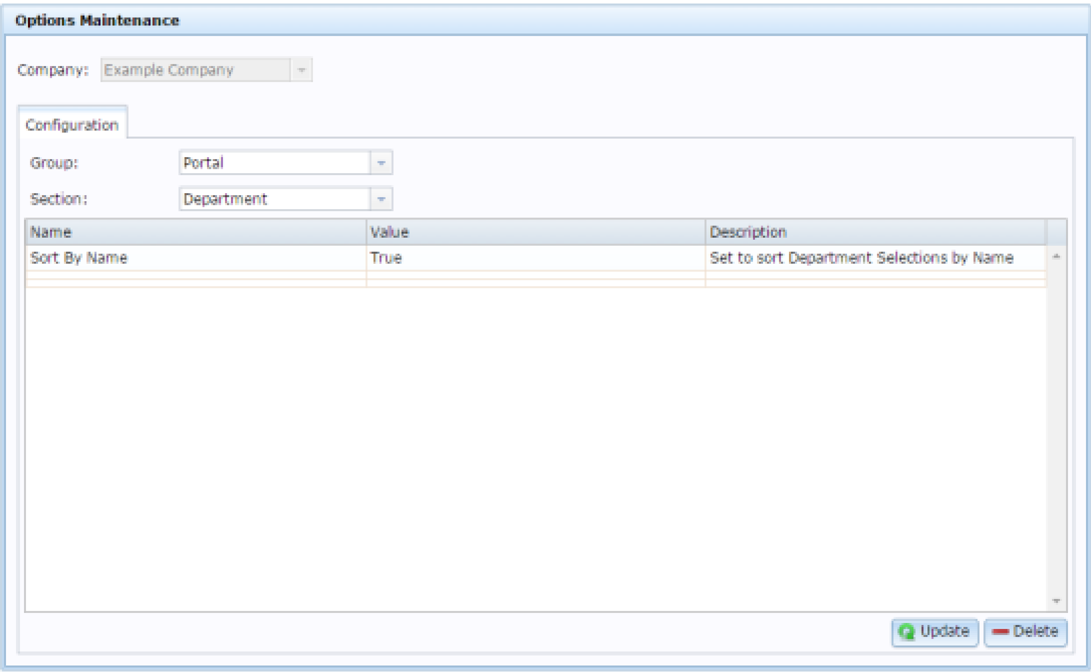

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.



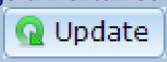

4. Select Departments from the Section drop-down list.

   The Departments section is displayed.




For more information on Departments, see *Managing divisions and departments*.

## Company Options - Departments section key fields and buttons

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

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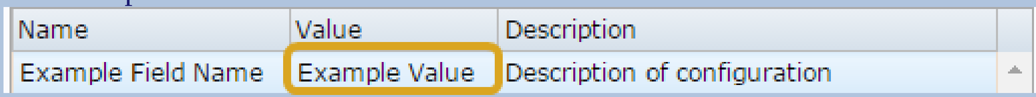



| Configuration | Description |
|---|---|
| **Sort By Name** | Type True to sort departments alphabetically by name.<br><br>Type False to sort departments by their department code. |

# Configuring item variations for your company

Use the Company Options - Fashion section to configure your company's item variations. Choose up to three categories that the same item can vary, such as a specific fit or cut, a size or colour. You can configure the Portal to rename these three categories as needed, and configure them to contain whatever variations you need. See *Configuring item variation labels for your company* on page 186.

> **Note:** Item variations are not the same as item options. Item options are used to include additional optional features with items at the time of sale, such as adding a special logo to a t-shirt. Item variations are variants on the item that can't be changed at time of sale, such as the size of a t-shirt, or its colour. For more information on item options, see *Managing item options and modifiers*.

> **Note:** The terms **colour**, **size** and **style** are used in this documentation because they are the default terms of the Portal. You can configure the Portal to use the terms that best fit your inventory variants.

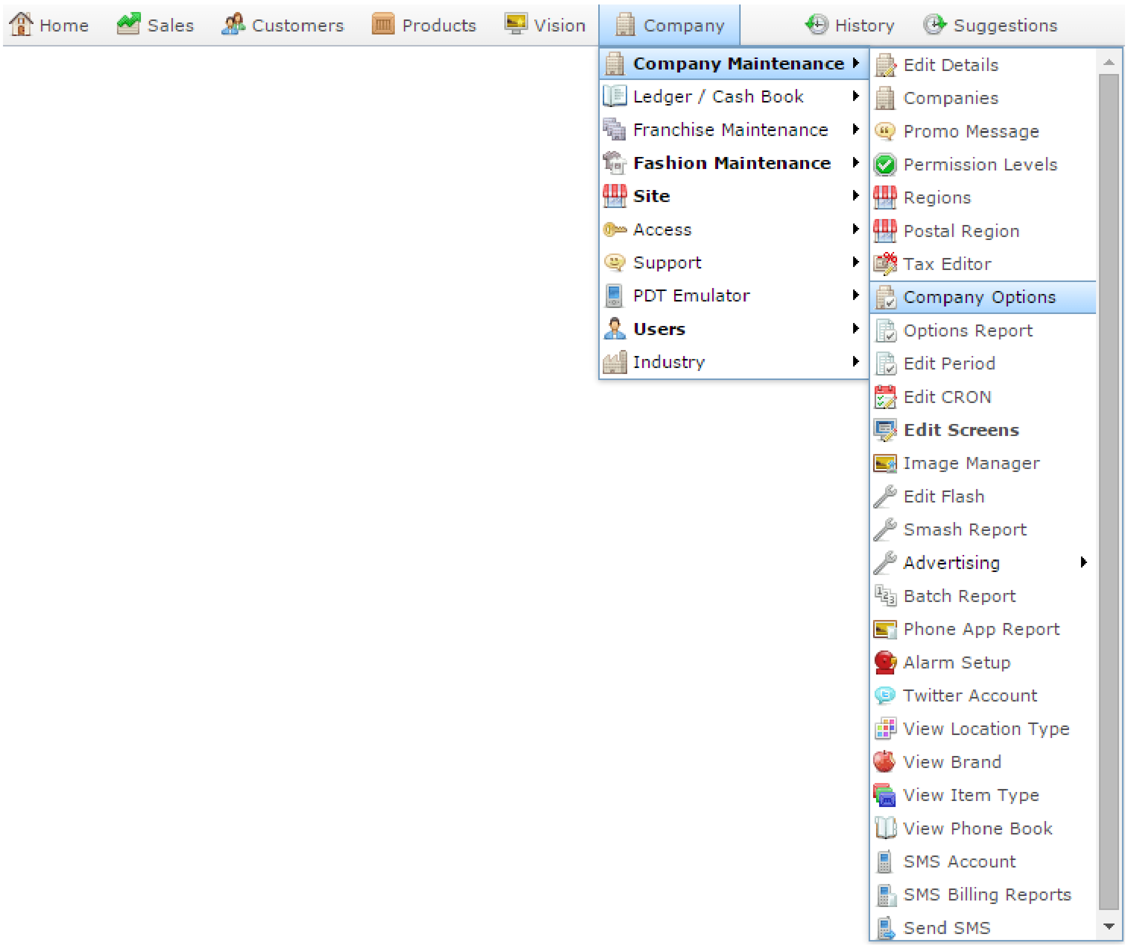
## Opening the Company Options - Fashion section

To open the Company Options - Fashion section:

1. Press 

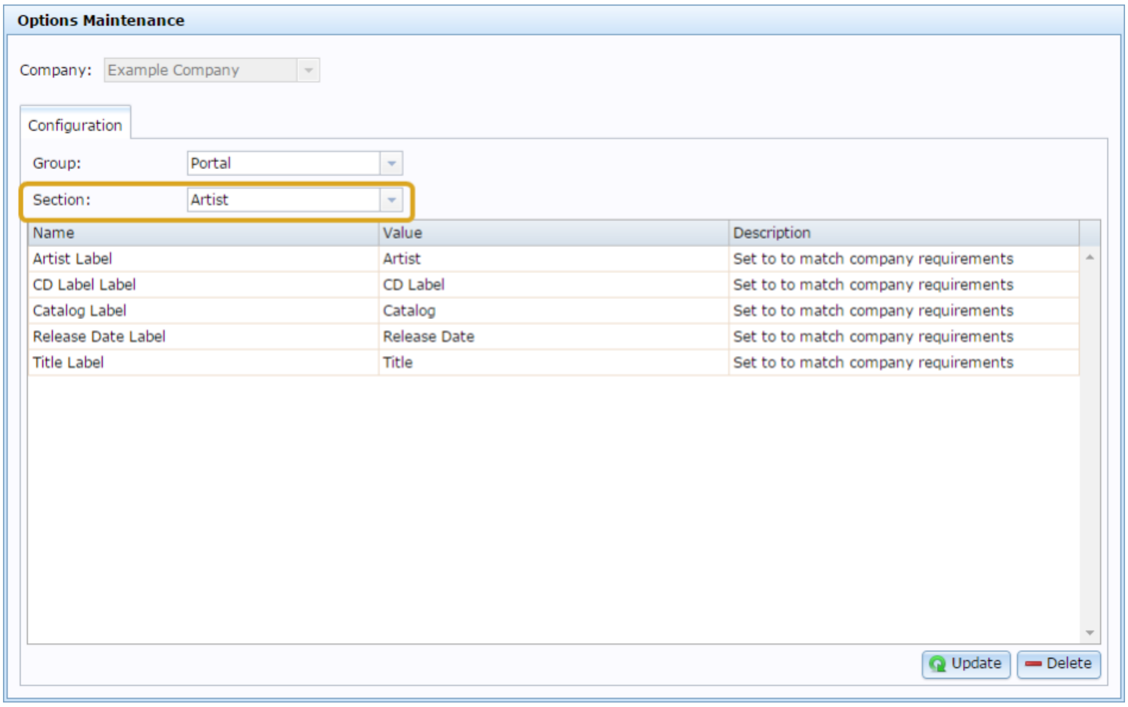
.
2. Press Company Maintenance > Company Options.

Company Maintenance screen



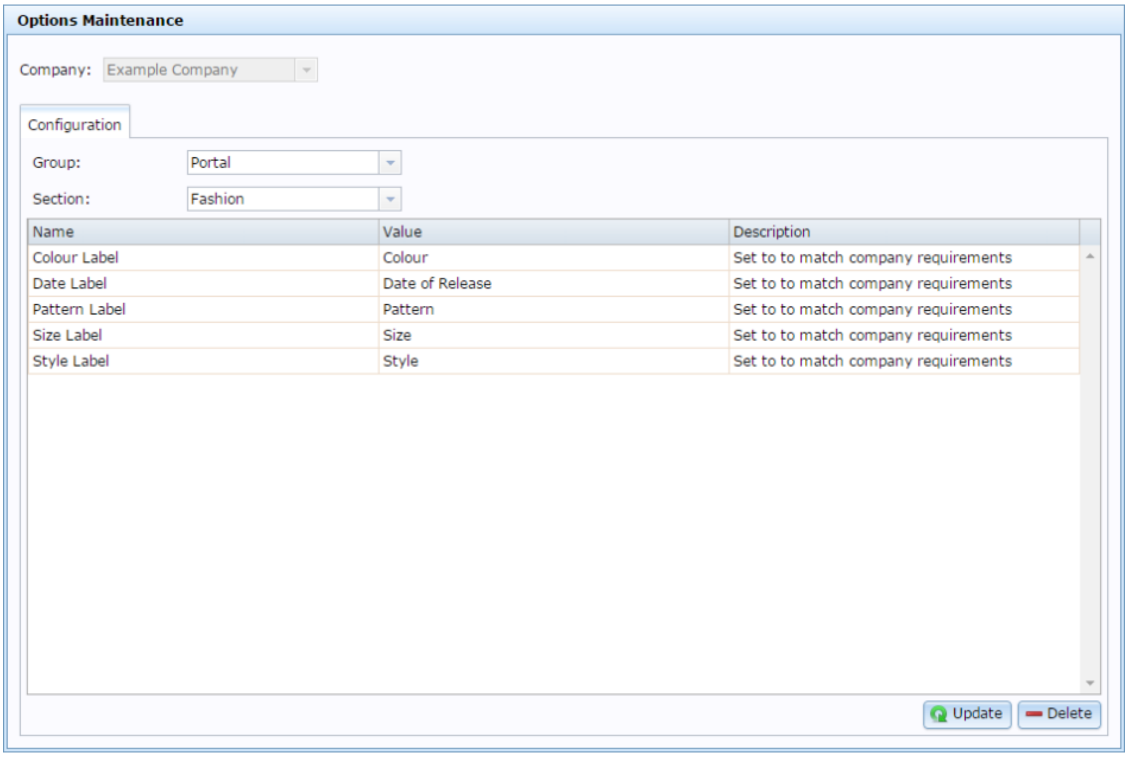

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.



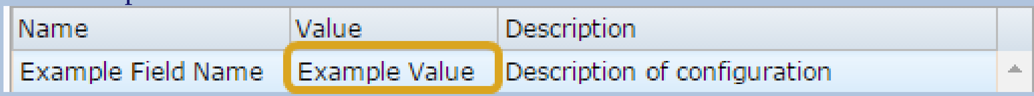

4. Select Fashion from the Section drop-down list.

   The Fashion section is displayed.



## Company Options - Fashion section key fields and buttons

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




| Configuration | Description |
|---|---|
| **Colour Label** | Type the label to use for a secondary item variation category in the **Value** field. An item can have one colour selected from a set you configure.<br><br>See *Create a colour* on page 188. |
| **Date Label** | Type the label to use for the item's date information in the **Value** field. For example, date of release, date of design. |
| **Pattern Label** | Type the label to use for the item's pattern description in the **Value** field. This is a descriptive text field for the item. |
| **Size Label** | Type the label to use for a secondary item variation category in the **Value** field. An item can have one size selected from a set you configure.<br><br>See *Creating a size* on page 197. |
| **Style Label** | Type the label to use for the primary item variation category in the **Value** field. An item can have one style selected from a set you configure.<br><br>See *Creating a style* on page 209. |

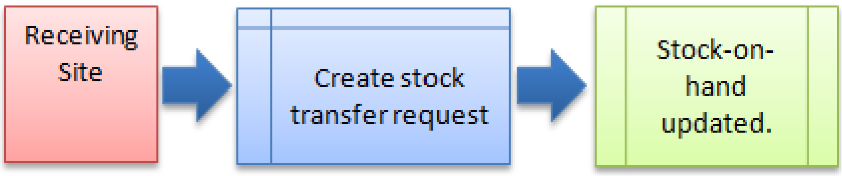
# Configuring inter-branch transfers for your company

Use the Company Options - IBT section to configure your company for transfers of stock between sites.

Through the Portal, you can control how many layers of authorisation is required for inter-branch transfers. Higher levels of security adds more authentication steps to the process.

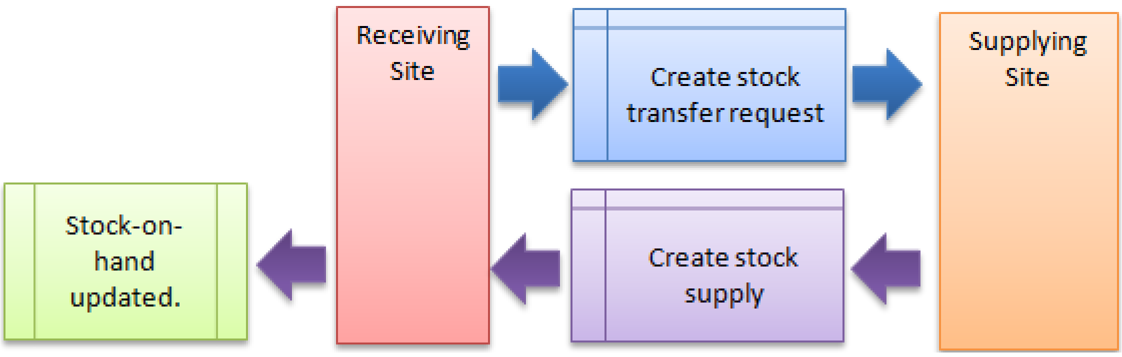
## Level 1

At the simplest level, the Portal moves the stock from one site to another when the inter-branch transfer request from the receiving site is finalised. There is no input or authorisation from the site sending the stock. This level assumes the same person controls both sites, and is simply reallocating stock.




## Level 2

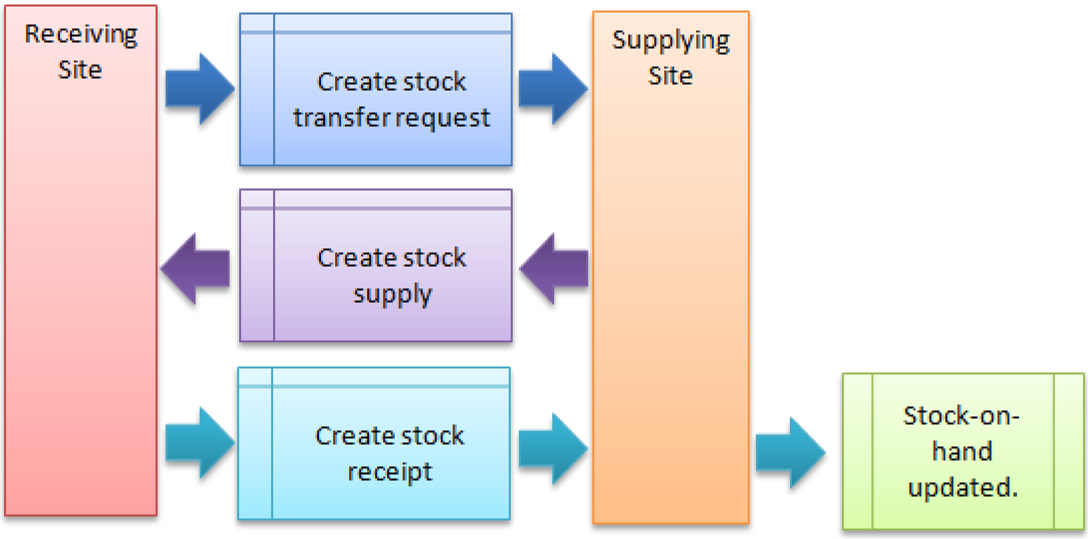
At the intermediate level, the receiving site creates an inter-branch transfer to request stock from the sending site. When the request is finalised, the sending site must record how much stock they are actually sending to the receiving site. When this stock transfer from the sending site is finalised, the Portal moves the stock.




## Level 3

At the most secure level, the receiving site creates their inter-branch transfer to request stock. The sending site receives the request and creates their transfer record of how much stock they are sending. The receiving site records how much stock they actually received from the sending site. When the receiving site has finalised this stock receipt, the Portal moves the stock.

Company Maintenance
screen

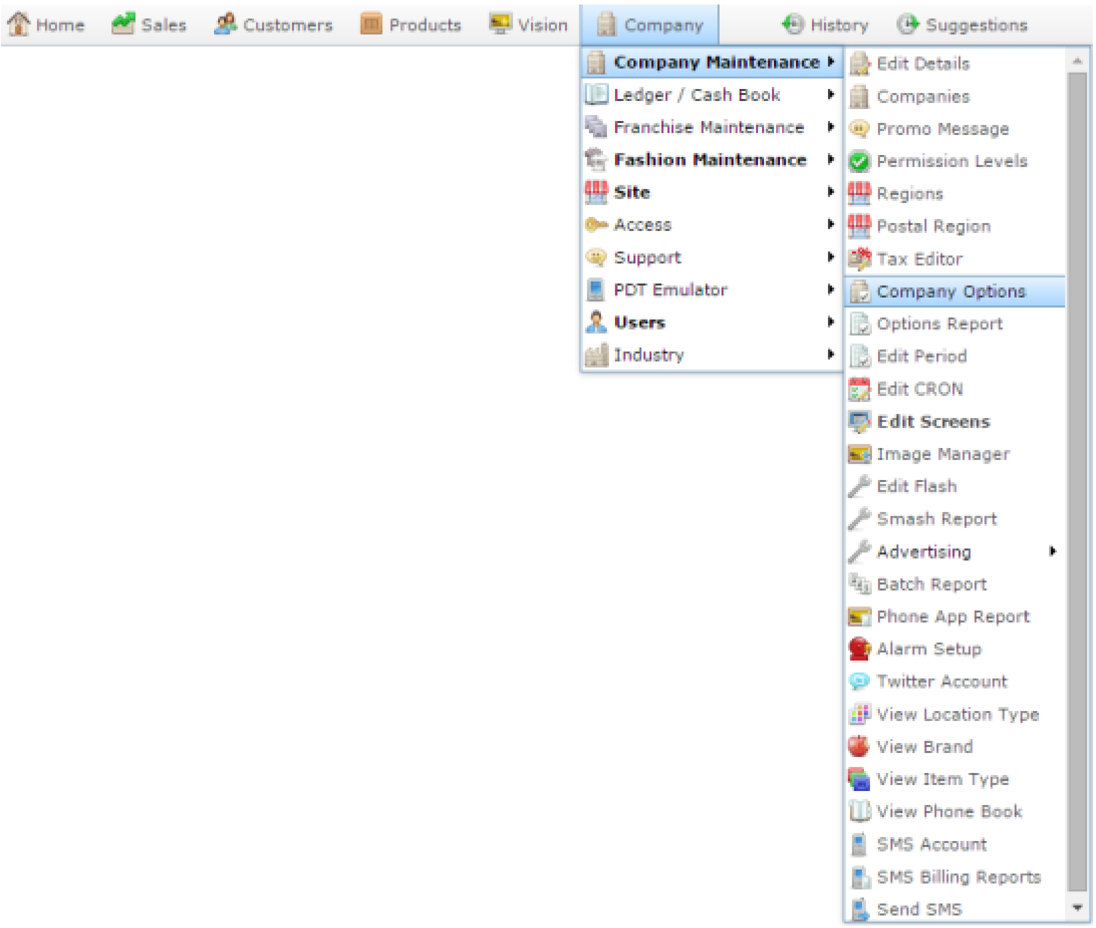


# Opening the Company Options - IBT section

To open the Company Options - IBT section:

1. Press .

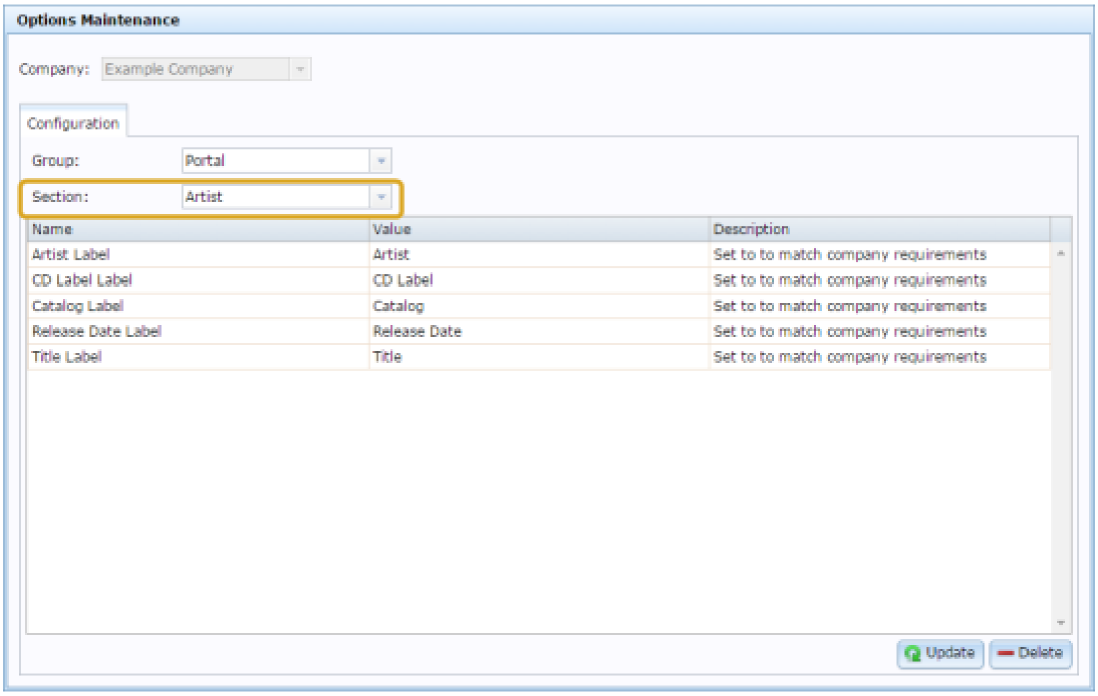
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

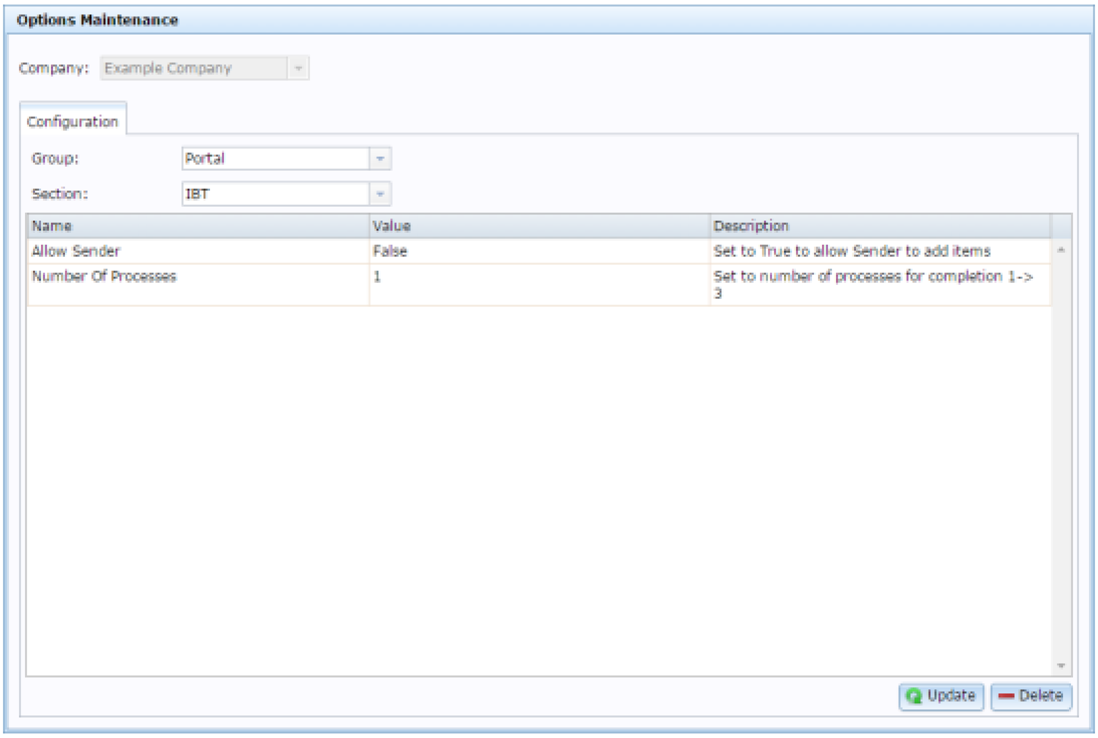
3. Open the Section drop-down list.

Company Maintenance screen

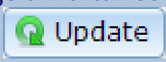



4. Select IBT from the Section drop-down list.

   The IBT section is displayed.



## Company Options - IBT section key fields and buttons

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

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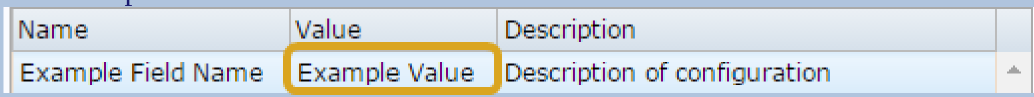



| Configuration | Description |
|---|---|
| Allow Sender | Type True to permit the sending branch to add items to the transfer. |
| Number of Processes | Select the level of authentication required for inter-branch transfers.<br><br>**1** Simplest authentication.<br>1. Receiving site creates a request.<br>Stock is moved.<br><br>**2** Intermediate authentication.<br>1. Receiving site creates a request.<br>2. Sending site records what stock is sent.<br>Stock is moved.<br><br>**3** Highest authentication.<br>1. Receiving site creates a request.<br>2. Sending site records what stock is sent.<br>3. Receiving site confirms what stock is received.<br>Stock is moved. |

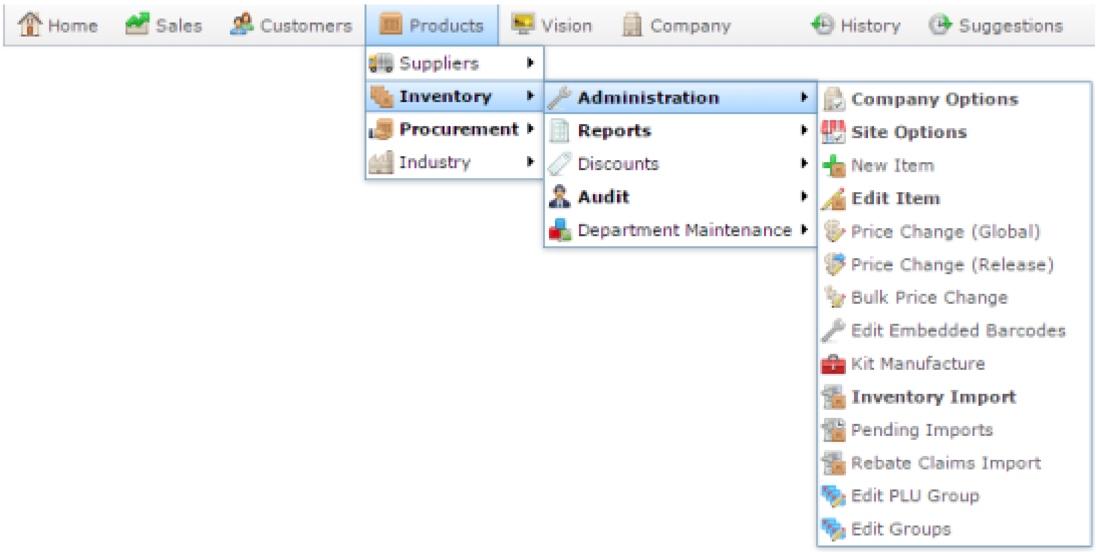
# Configuring inventory options for your company

Use the Company options - Inventory screen to control how inventory is managed in a company. These settings apply to all sites within a company.

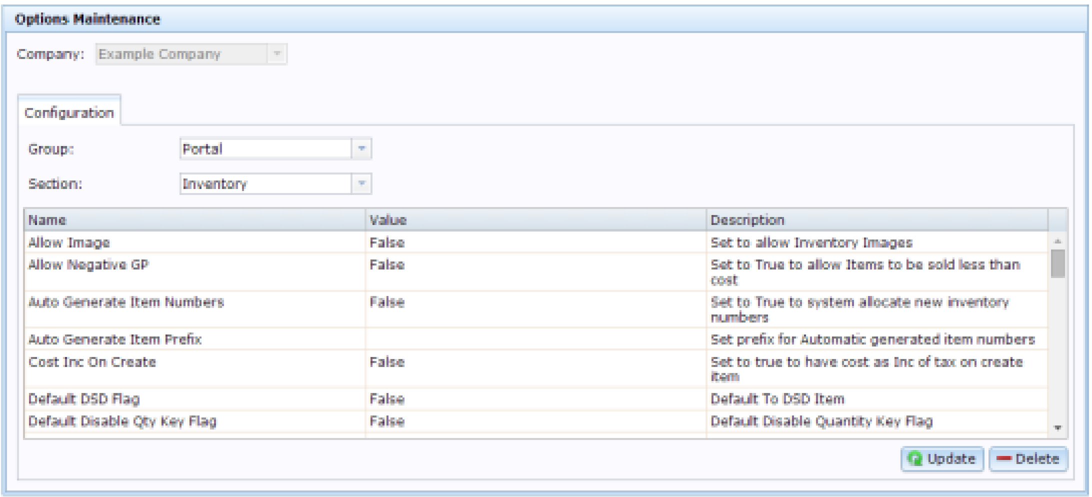
## Opening the Company options - Inventory screen

To open the Company options - Inventory screen:

1. Press Products in the main menu bar.
2. Press Inventory > Administration > Company options.




The Company options - Inventory screen is displayed.



## Company options - Inventory screen key fields and buttons

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

| Name | Value | Description |
|---|---|---|
| Example Field Name | Example Value | Description of configuration |

| Configuration | Description |
|---|---|
| **Allow image** | Type True to allow images of items to be stored on the Portal. |
| **Allow Negative GP** | Type True to allow items to be sold at less than their cost. |
| **Auto Generate Item Numbers** | Type True to automatically allocate unique item numbers for items added to your inventory. |
| **Auto Generate Item Prefix** | Type the prefix that should be added at the start of automatically generated item numbers. Leave this field blank to not add any prefix. |
| **Cost Inc On Create** | Type True if your item costs include tax. |

| Configuration | Description |
|---|---|
| **Default DSD Flag** | Type True if your items are usually purchased directly from the debtor (Direct Supply form Debtor).<br><br>If your organisation warehouses supplies and requires companies to purchase items from a central warehouse, type False. |
| **Default Disable Qty Key Flag** | Type True to disable the Point of Sale quantity key by default. For example, if most of your items are sold by weight. This setting can be overridden for individual items. |
| **Default Discount Flag** | Type True to permit discounts for items by default. |
| **Default Discount Max** | Type the default maximum percentage that items can be discounted. This can be overridden for individual items. |
| **Default Max SOH** | Type the maximum stock on hand amount for all items. This can be overridden for individual items. |
| **Default Min Order Qty** | Type the minimum quantity to be used when ordering items. This can be overridden for individual items. |

| Configuration | Description |
|---|---|
| **Default Model Stock** | Type the default Target Model Stock (Days) to be used for items, which determines the number of days' worth of stock you want to maintain. See *Inventory Management - Stock Control tab*. |
| **Default Pack** | The default number of items included when items are combined in a pack. |
| **Default Reorder Point** | The default stock on hand level that triggers reordering items. This can be overridden for individual items. |
| **Default Reorder Qty** | The default number of items to reorder. This can be overridden for individual items. |
| **Default Replenishable Flag** | Type True if your items can usually be reordered or replenished. This can be overridden for individual non-replenishable items. |
| **Default Send To Terminals Flag** | Type True if most of your items should be available to be sold via the Point of Sale. |
| **Default Size** | Type the default size of your items. This can be overridden for individual items. |

| Configuration | Description |
|---|---|
| **Default Tax Inclusive** | Type True if your item prices usually include tax. This can be overridden for individual items. |
| **Default Tax Rate** | Type the default tax rate for items. |
| **Default Use By Days** | Type the default number of days a perishable item can be kept, printed on labels. This date is calculated from the date the label is printed, and can be overridden for individual items. |
| **Enable Artist Information** | Type True to store artist information for items.<br><br>**Note:** The label used for Artist Information can be overridden for your company. |
| **Enable Colour Information** | Type True to store colour fashion and brand information for items. |
| **Enable Cost Plus Pricing** | Type True to allow the portal to automatically calculate item prices based on the item cost plus a set amount or percentage. |

| Configuration | Description |
|---|---|
| **Enable Extra Information** | Type True to store additional information from the warehouse about items such as Fashion variants, etc.<br><br>**Note:** The field names of the extra information depend on your Portal configuration. |
| **Enable Ingredients** | Type True to store ingredient and nutritional information about items.<br><br>**Note:** This information is not required for item creation, even if this configuration is enabled. |
| **Force Firstcase** | Force the first letter of each word in the item description to be upper case. |
| **Force Lowercase** | Force all letters in the item description to be lower case. |
| **Force Uppercase** | Force all letters in the item description to be upper case. |
| **IGA Supplier** | Type your allocated IGA supplier number to be used for IGA imports. |
| **Image Height** | Type the maximum height in pixels of item images. |

| Configuration | Description |
| --- | --- |
| **Image Width** | Type the maximum width in pixels of item images. |
| **Level 1 Cost Plus Fixed** | If cost-plus pricing is enabled, type the fixed amount to be added to the standard (retail) pricing level. |
| **Level 1 Cost Plus Percentage** | If cost-plus pricing is enabled, type the percentage of the cost to be added to the standard (retail) pricing level. |
| **Level 2 Cost Plus Fixed** | If cost-plus pricing is enabled, type the fixed amount to be added to the level 2 pricing level. |
| **Level 2 Cost Plus Percentage** | If cost-plus pricing is enabled, type the percentage of the cost to be added to the level 2 pricing level. |
| **Level 3 Cost Plus Fixed** | If cost-plus pricing is enabled, type the fixed amount to be added to the level 3 pricing level. |
| **Level 3 Cost Plus Percentage** | If cost-plus pricing is enabled, type the percentage of the cost to be added to the level 3 pricing level. |

| Configuration | Description |
|---|---|
| **Level 4 Cost Plus Fixed** | If cost-plus pricing is enabled, type the fixed amount to be added to the level 4 pricing level. |
| **Level 4 Cost Plus Percentage** | If cost-plus pricing is enabled, type the percentage of the cost to be added to the level 4 pricing level. |
| **Level 5 Cost Plus Fixed** | If cost-plus pricing is enabled, type the fixed amount to be added to the level 5 pricing level. |
| **Level 5 Cost Plus Percentage** | If cost-plus pricing is enabled, type the percentage of the cost to be added to the level 5 pricing level. |
| **Recalc Cost** | Type True if you want the Portal to automatically recalculate all item costs if the Tax Included / Excluded flag is changed. |
| **Show Margins** | Type True if you want to be able to view profit margins on items in the Pricing tab of Inventory Maintenance. See *Inventory Management - Pricing tab*. |
| **Supplier Required** | Type True to require a supplier for each created item. |

| Configuration | Description |
| --- | --- |
| **Update Kit Cost** | Type True if the cost of a kit should be automatically calculated by the cost of the component items. Type False if you want to update the kit cost manually. |
| **Use SOH For Labels** | Type True to use stock-on-hand for label counts when generating individual labels for items. |

# Configuring the ledger for your company

Use the Company Options - Ledger section to configure the ledger codes used by default Portal systems such as sales discounts and loyalty.

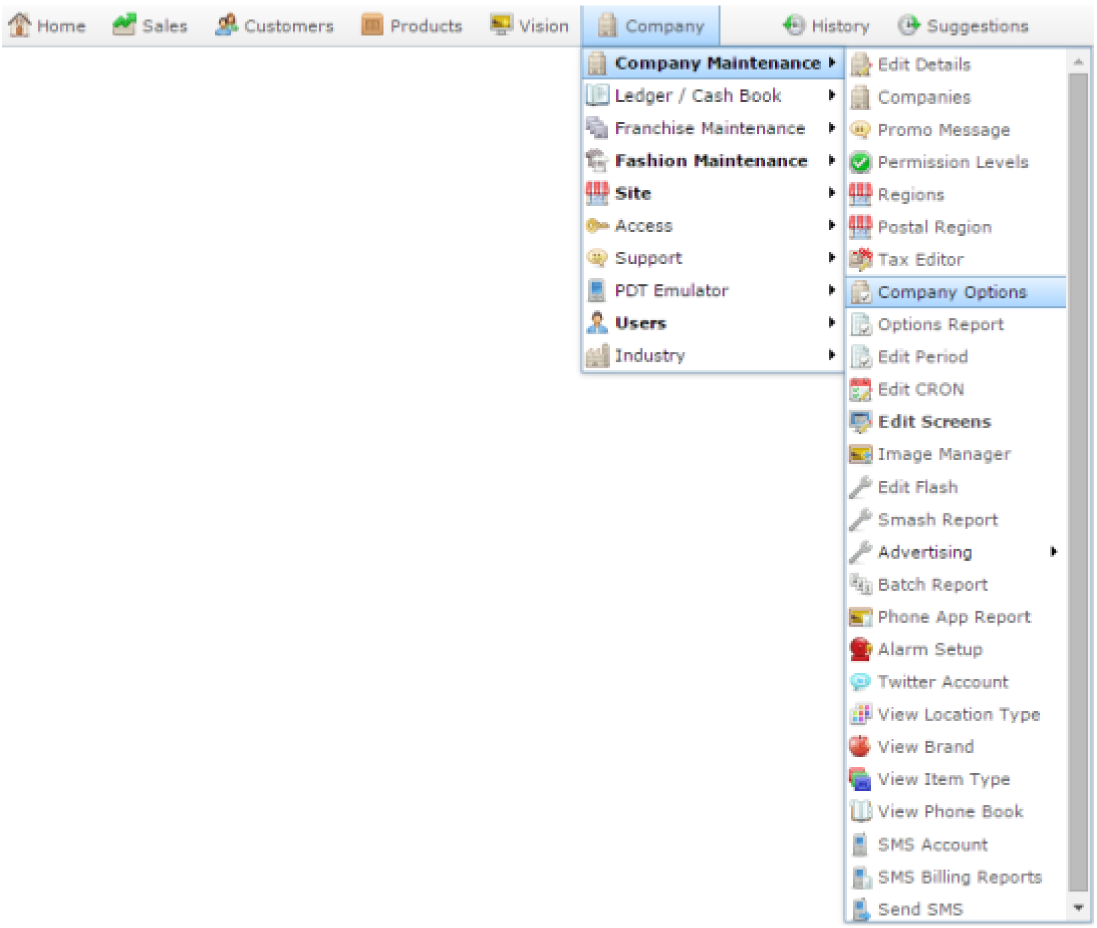
**Tip:** You can also configure your own custom ledgers. See *Ledger Maintenance screen*.

## Opening the Company Options - Ledger section

To open the Company Options - Ledger section:

1. Press 

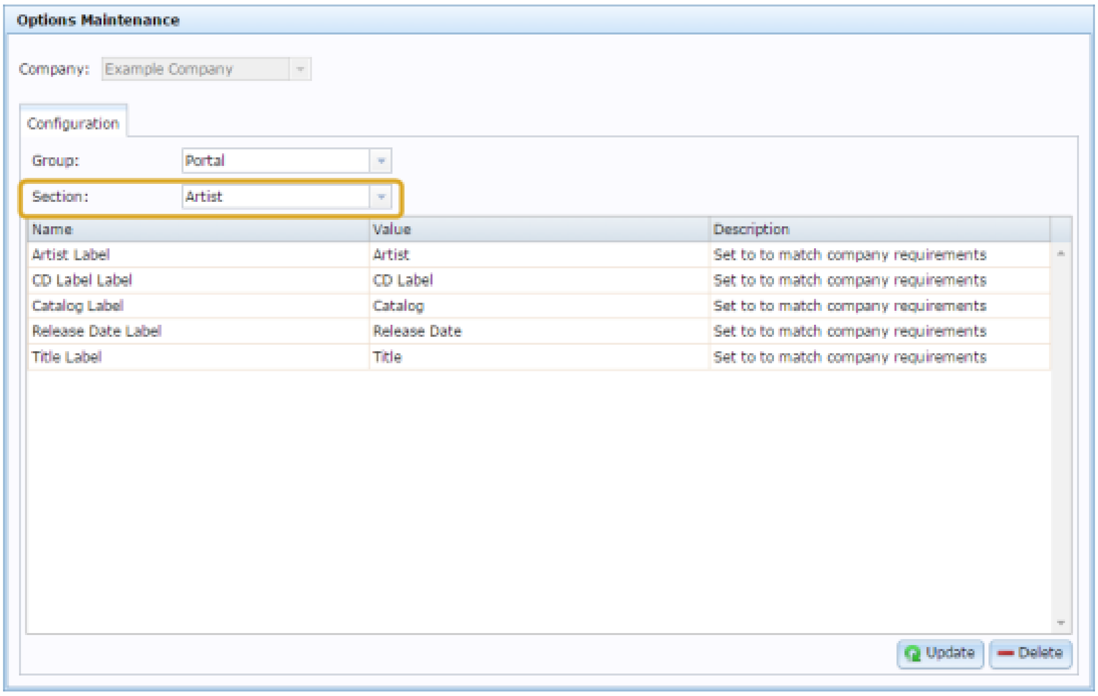
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

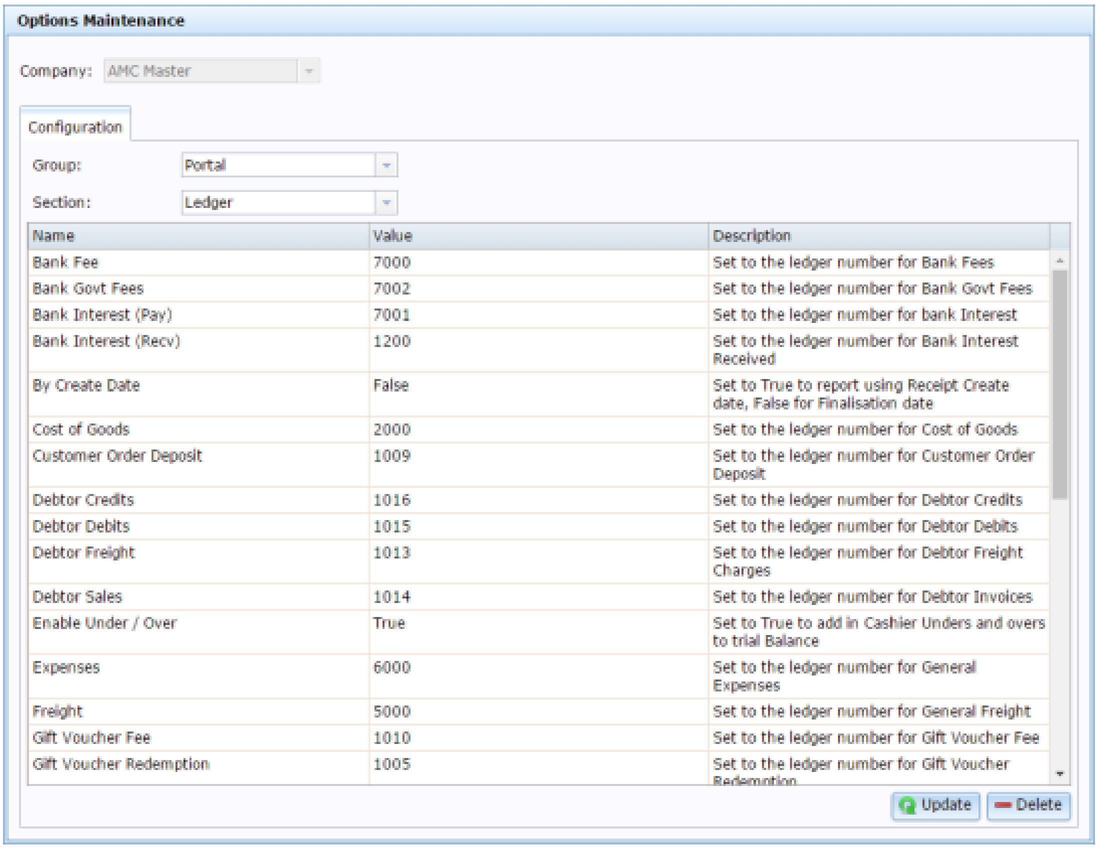
3. Open the Section drop-down list.

Company Maintenance screen




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

   The Ledger section is displayed.



## Company Options - Ledger section key fields and buttons

| Field | Description |
|---|---|
| **Bank Fee** | Type the unique ledger code to use for bank fees. |
| **Bank Govt Fee** | Type the unique ledger code to use for government bank fees. |
| **Bank Interest (Pay)** | Type the unique ledger code to use for interest you have paid to the bank. |
| **Bank Interest (Recv)** | Type the unique ledger code to use for interest you have received from the bank. |
| **By Create Date** | Type True to report using the creation date of the receipt, or False to report using the date the sale was finalised. |
| **Cost of Goods** | Type the unique ledger code to use for the cost of goods. |
| **Customer Order Deposit** | Type the unique ledger code to use for deposits for customer orders. |
| **Debtor Credits** | Type the unique ledger code to use for credits to debtor accounts. |

| Field | Description |
|---|---|
| **Debtor Debits** | Type the unique ledger code to use for debits to debtor accounts. |
| **Debtor Freight** | Type the unique ledger code to use for freight for debtor orders. |
| **Debtor Sales** | Type the unique ledger code to use for sales to debtors. |
| **Enable Under / Over** | Type True to include the cashier's Under and Over in the balance. |
| **Expenses** | Type the unique ledger code to use for general expenses not otherwise covered. |
| **Freight** | Type the unique ledger code to use for general freight expenses. |
| **Gift Voucher Fee** | Type the unique ledger code to use for fees charged when creating gift vouchers. |
| **Gift Voucher Redemption** | Type the unique ledger code to use for the redemption of gift vouchers. |
| **Gift Voucher Sales** | Type the unique ledger code to use for the sale of gift vouchers. |

| Field | Description |
|---|---|
| **Home Delivery Fee** | Type the unique ledger code to use for the fees charged for home delivery. |
| **Lay By Deposits** | Type the unique ledger code to use for the deposits for lay by sales. |
| **Lay By Fees** | Type the unique ledger code to use for the fees charged for setting up a lay by. |
| **Other Sales** | Type the unique ledger code to use for sales not otherwise categorised. |
| **Petty Cash** | Type the unique ledger code to use for petty cash expenses. |
| **Purchases** | Type the unique ledger code to use for stock purchases. |
| **Receipt Discounts** | Type the unique ledger code to use for discounts received in stock receipting. |
| **Receipt Fees** | Type the unique ledger code to use for fees in stock receipting. |

| Field | Description |
|---|---|
| **Receipt Freight** | Type the unique ledger code to use for freight charged for stock receipting. |
| **Redemption** | Type the unique ledger code to use for loyalty point redemptions. |
| **Sales** | Type the unique ledger code to use for sales. |
| **Sales Discounts** | Type the unique ledger code to use for discounts in sales. |
| **Service Tax** | Type the unique ledger code to use for applied service taxes. |
| **Surcharge** | Type the unique ledger code to use for applied surcharges. |
| **Under / Over** | Type the unique ledger code to use for under or over amounts on the balance. |

# Configuring your company for loyalty

Use the Company Options - Loyalty section to configure your company for customer loyalty reward systems.

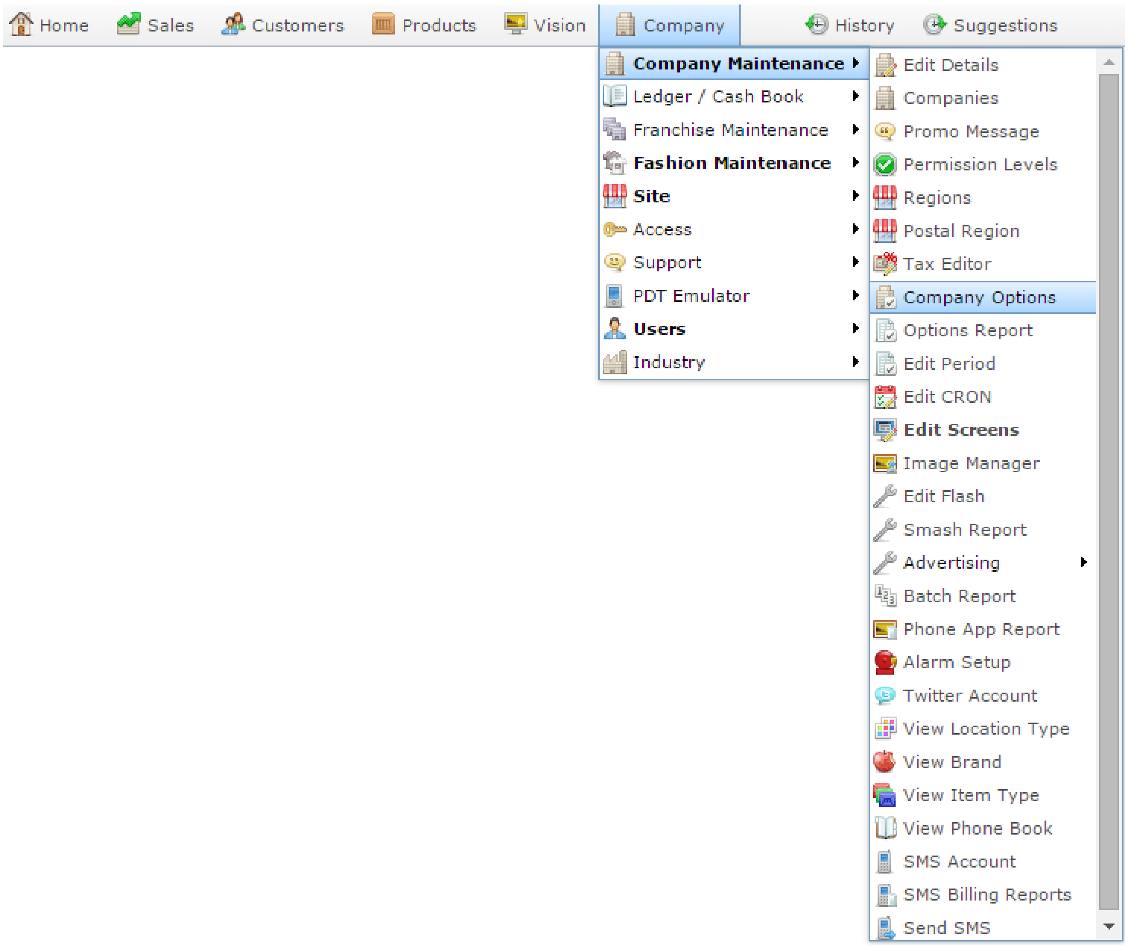
**Note:** There are several sections for configuring loyalty within your company. Also see:
*Configuring your company for loyalty information* on page 96,
*Configuring your company for loyalty emails* on page 100,
*Configuring your company for loyalty events* on page 104.

## Opening the Company Options - Loyalty section

To open the Company Options - Loyalty section:

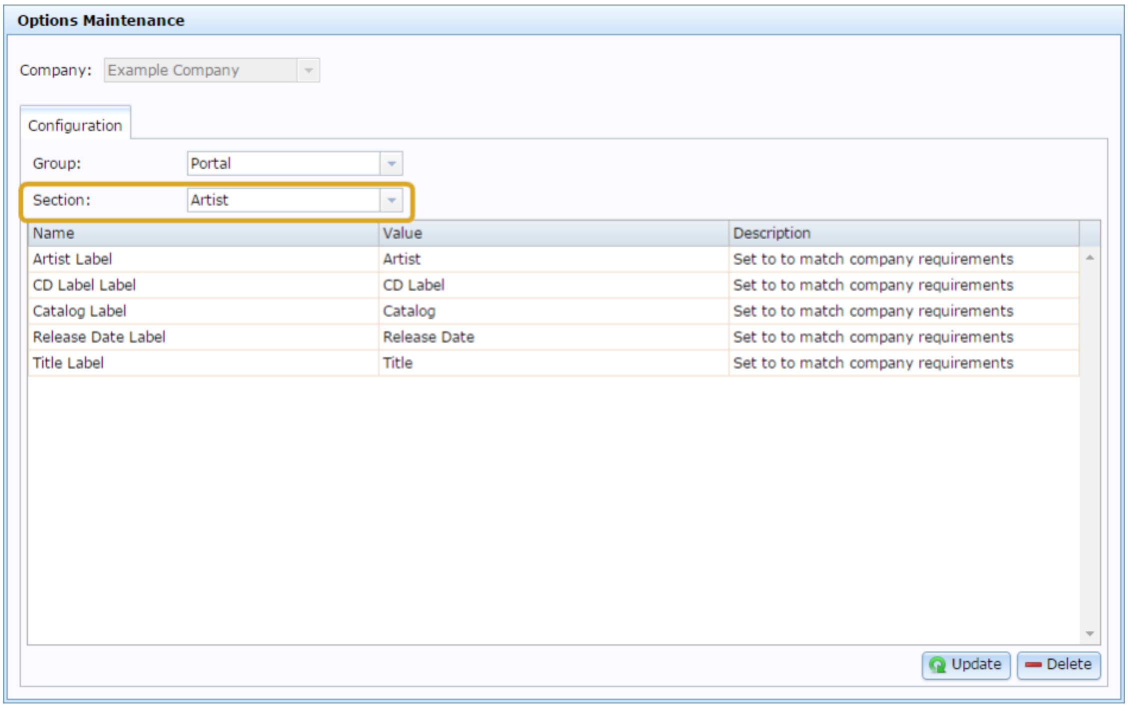
1. Press 

.
2. Press Company Maintenance > Company Options.



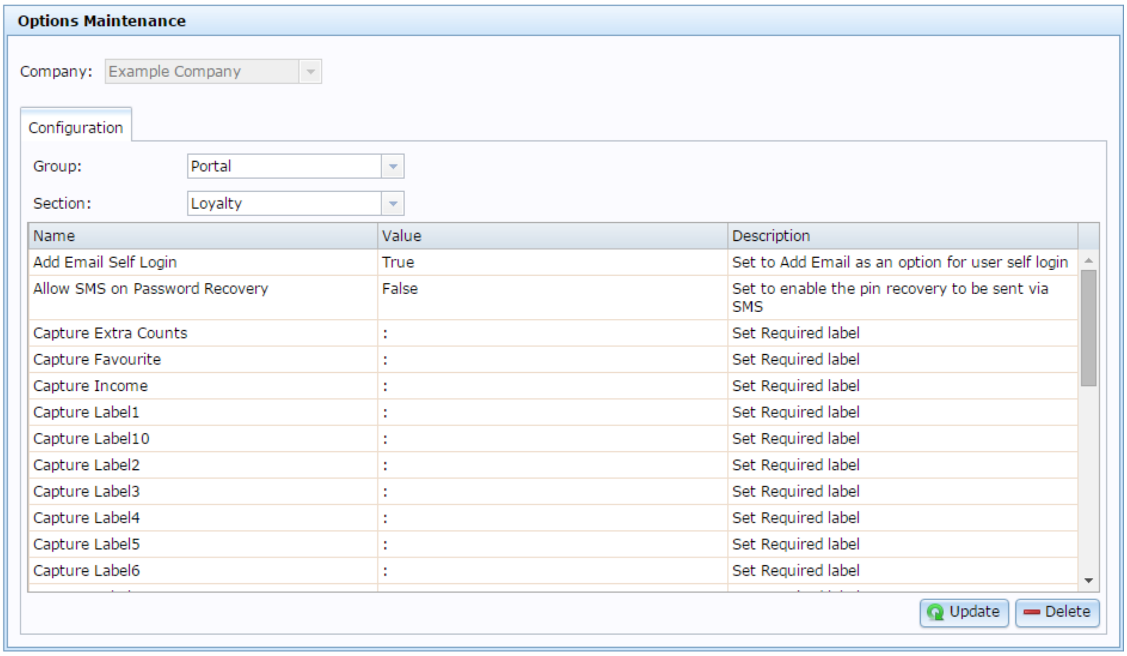

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.




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

The Loyalty section is displayed.



## Company Options - Loyalty section key fields and buttons

| Field | Description |
| --- | --- |
| **Add Email Self Login** | Type true to permit loyalty customers to sign in using their email address.<br><br>The Portal attempts to verify loyalty logins using:<br><br>1. Email, if enabled using this configuration setting.<br>2. Mobile number, if the loyalty member has recorded a mobile number.<br>3. Card number. |
| **Allow SMS on Password Recovery** | Type true to allow card PINs to be sent to loyalty members via SMS.<br><br>**Note:** You must have purchased SMS credits for the Portal to send the SMS. Password recovery SMS messages are charged at the usual SMS rate. |
| **Capture Extra Counts** | Type the label displayed when capturing this option.<br><br>**Note:** If you are using the user-defined loyalty member maintenance screen, this configuration setting is ignored. |

| Field | Description |
|---|---|
| **Capture Favourite** | Type the label displayed when displaying the 'Favourite' option on the loyalty log in.<br><br>**Note:** If you are using the user-defined card login screen, this configuration setting is ignored. |
| **Capture Income** | Type the label displayed when requesting the customer's income level. |
| **Capture Labels A / B** | Type the label displayed when requesting custom information your company wants to record about loyalty customers.<br><br>**Note:** These fields correspond to the **Cap1**, **Cap2** fields in the Name tab of Loyalty Maintenance. |
| **Capture Labels 1-9** | Type the label displayed when requesting custom information your company wants to record about loyalty customers.<br><br>**Note:** These fields correspond to the **Soft Label 1-10**fields in the Name tab of Loyalty Maintenance. |

| Field | Description |
| --- | --- |
| **Capture Occupation** | Type the label displayed when requesting the customer's occupation.<br><br>**Note:** This field is displayed on the Card tab of Loyalty Maintenance, and can be used to capture other information if required. |
| **Cardtype Alter** | Type true to allow an external web site to alter the card type of the loyalty customer using the Portal's web API. |
| **Minimum Sales** | Type the minimum amount a customer must spend in order to be able to redeem loyalty points. |
| **Minimum Time** | Type the minimum number of days a customer must be a loyalty member before they can redeem loyalty points. |
| **Pin Case Sensitive** | Type true to make the PIN case sensitive.<br><br>If a PIN is case sensitive, then the customer must use the exact upper and lower case letters of the PIN. For example, apple and APPLE would be two different PINS. |

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>SMS Password Recovery</td><td>Type the SMS message used for password recovery SMS messages.<br><br>Note: Password recovery SMS messages incur the usual cost of an SMS message sent via the Portal.<br><br>Placeholders to personalise the message with the loyalty member's details are:<br><table>
<tr><td><<FIRST>></td><td>Loyalty member's first name.</td></tr>
<tr><td><<LAST>></td><td>Loyalty member's surname.</td></tr>
<tr><td><<MOBILE>></td><td>Loyalty member's mobile number.</td></tr>
<tr><td><<PIN>></td><td>Loyalty member's PIN.</td></tr>
</table></td></tr>
<tr><td>Show Transactions</td><td>Type true to show the customer's transactions when they log in.</td></tr>
<tr><td>Support Email</td><td>Type the email address for loyalty customer support.</td></tr>
<tr><td>Use Card as PIN on blank password</td><td>Type true to allow customers to use their card number as their PIN when logging in with their card.</td></tr>
</table>

| Field | Description |
|---|---|
| **Use Email as PIN on blank password** | Type true to allow customers to use their loyalty email address as their PIN when logging in with their card.<br><br>**Note:** You must collect the loyalty member's email address when issuing the card to use this feature. |
| **Use Mobile as PIN on blank password** | Type true to allow customers to use their mobile phone number as their PIN when logging in with their card. |

Company Maintenance
screen

# Configuring your company for loyalty information

Use the Company Options - Loyalty Compulsory section to configure what information the Portal configures compulsory for loyalty customers.

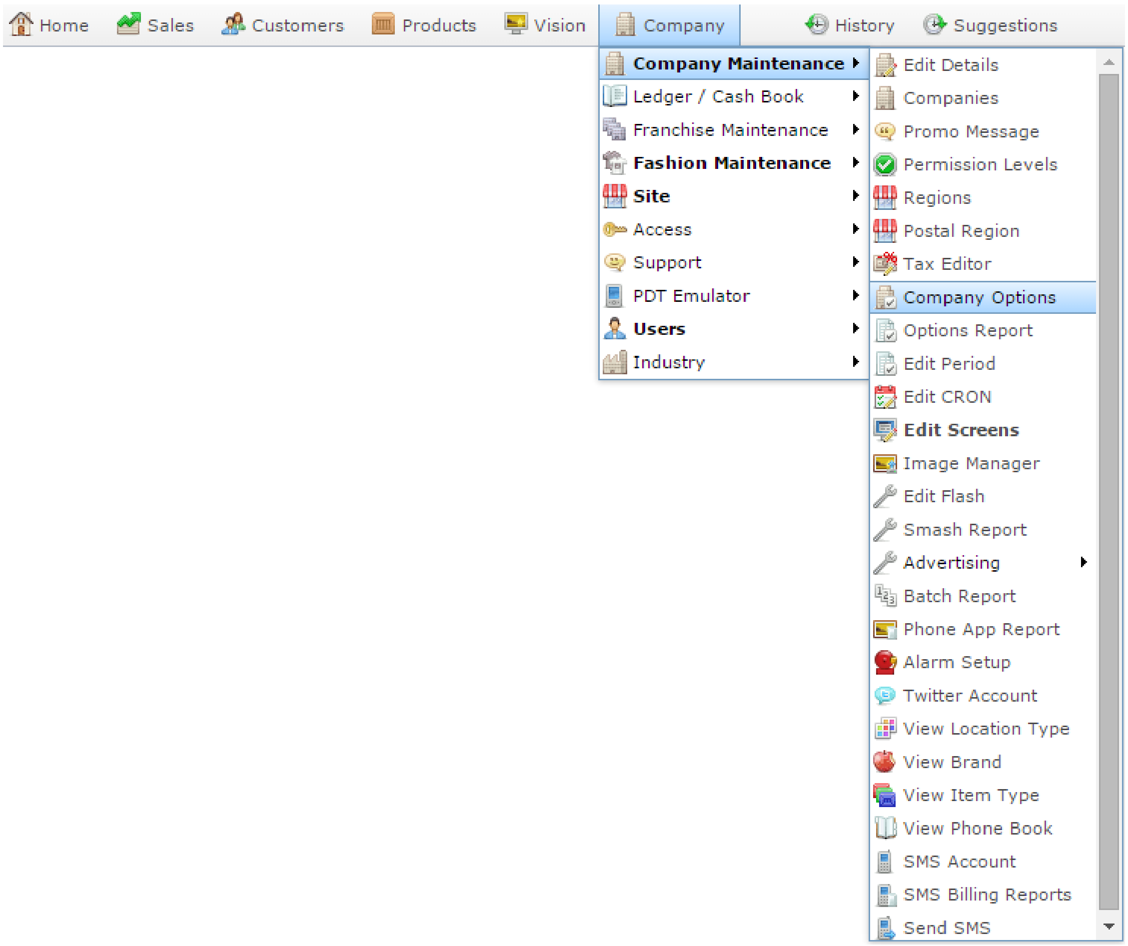
> **Note:** There are several sections for configuring loyalty within your company. Also see: *Configuring your company for loyalty* on page 89,
> *Configuring your company for loyalty emails* on page 100, *Configuring your company for loyalty events* on page 104.

## Opening the Company Options - Loyalty Compulsory section

To open the Company Options - Loyalty Compulsory section:

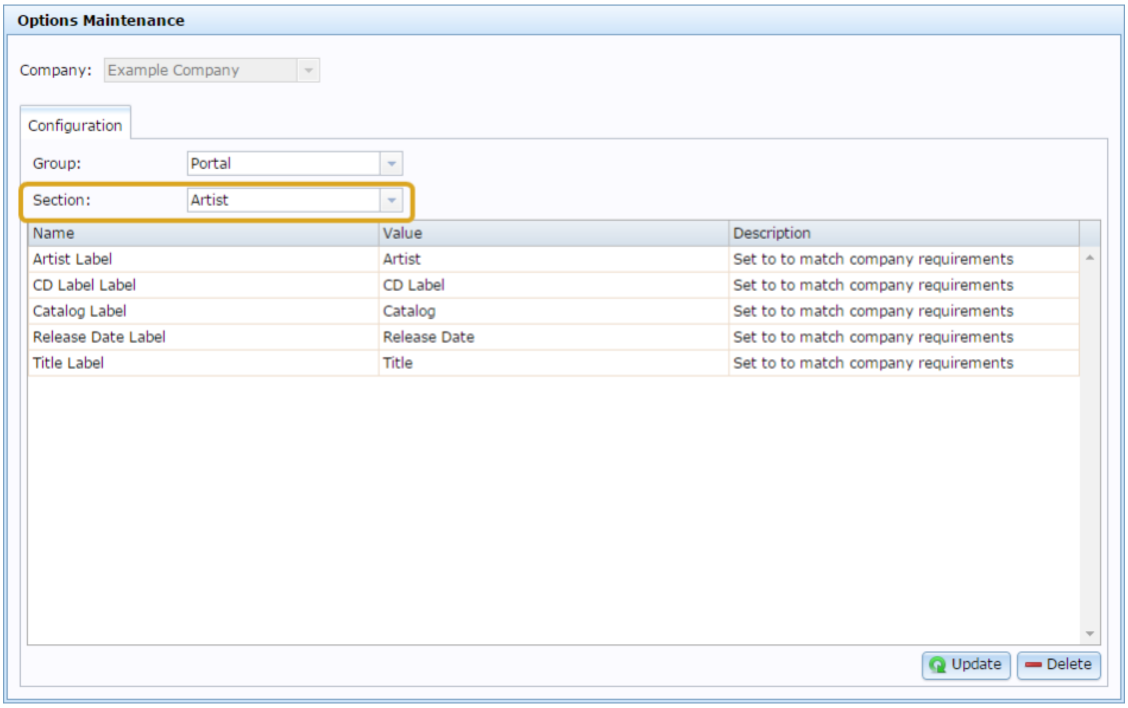
1. Press 

.
2. Press Company Maintenance > Company Options.



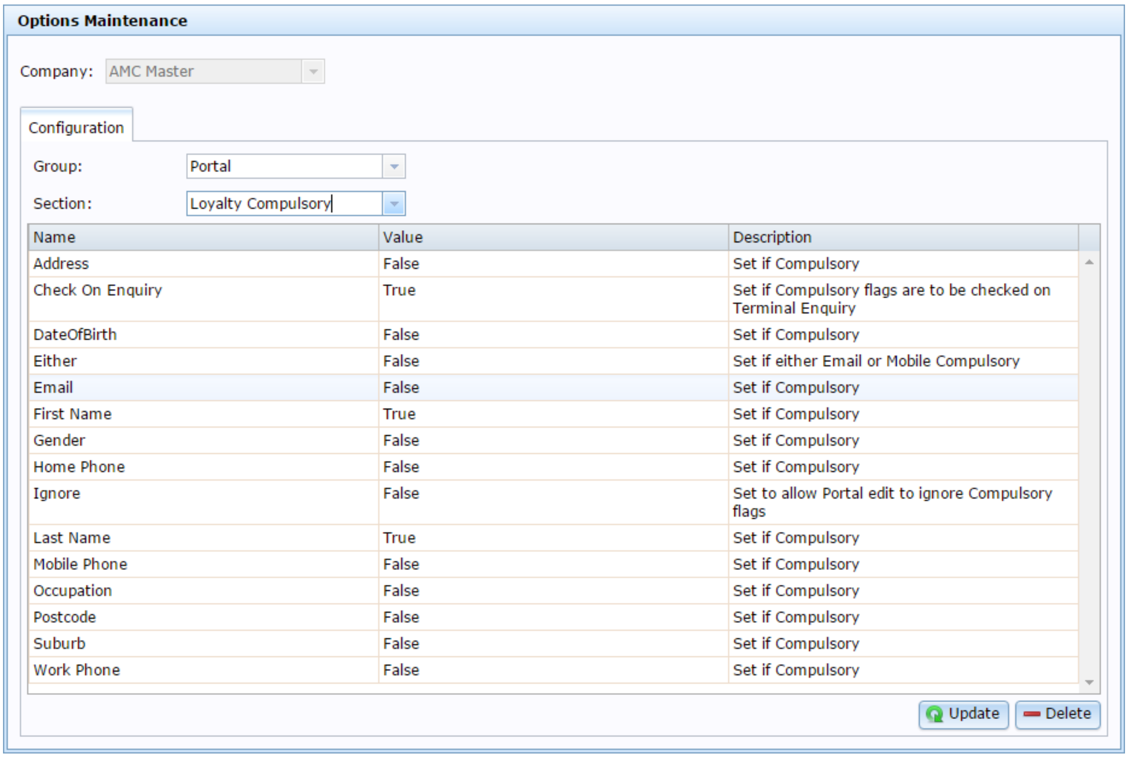

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.




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

   The Loyalty Compulsory section is displayed.



## Company Options - Loyalty Compulsory section key fields and buttons

| Field | Description |
|---|---|
| **Address** | Type True if the loyalty member's address must be completed. |
| **Check on Enquiry** | Type True if the Portal should check that compulsory fields are complete when the customer's details are checked at a terminal. |
| **Date of Birth** | Type True if the loyalty member's date of birth must be completed. |
| **Either** | Type True if either the loyalty member's email or mobile number must be completed. |
| **First Name** | Type True if the loyalty member's first name must be completed. |
| **Gender** | Type True if the loyalty member's gender must be completed. |
| **Home Phone** | Type True if the loyalty member's home phone number must be completed. |

| Field | Description |
|---|---|
| **Ignore** | Type True if Portal operators can ignore compulsory fields when they edit loyalty records through the Portal, for example edit a loyalty member and delete an incorrect address, even though the address field is compulsory. |
| **Last Name** | Type True if the loyalty member's last name must be completed. |
| **Mobile Phone** | Type True if the loyalty member's mobile phone number must be completed. |
| **Occupation** | Type True if the loyalty member's occupation must be completed. |
| **Postcode** | Type True if the loyalty member's post code must be completed. |
| **Suburb** | Type True if the loyalty member's suburb must be completed. |
| **Work Phone** | Type True if the loyalty member's work phone number must be completed. |

# Configuring your company for loyalty emails

Use the Company Options - Loyalty Email section to configure your company for customer loyalty emails.

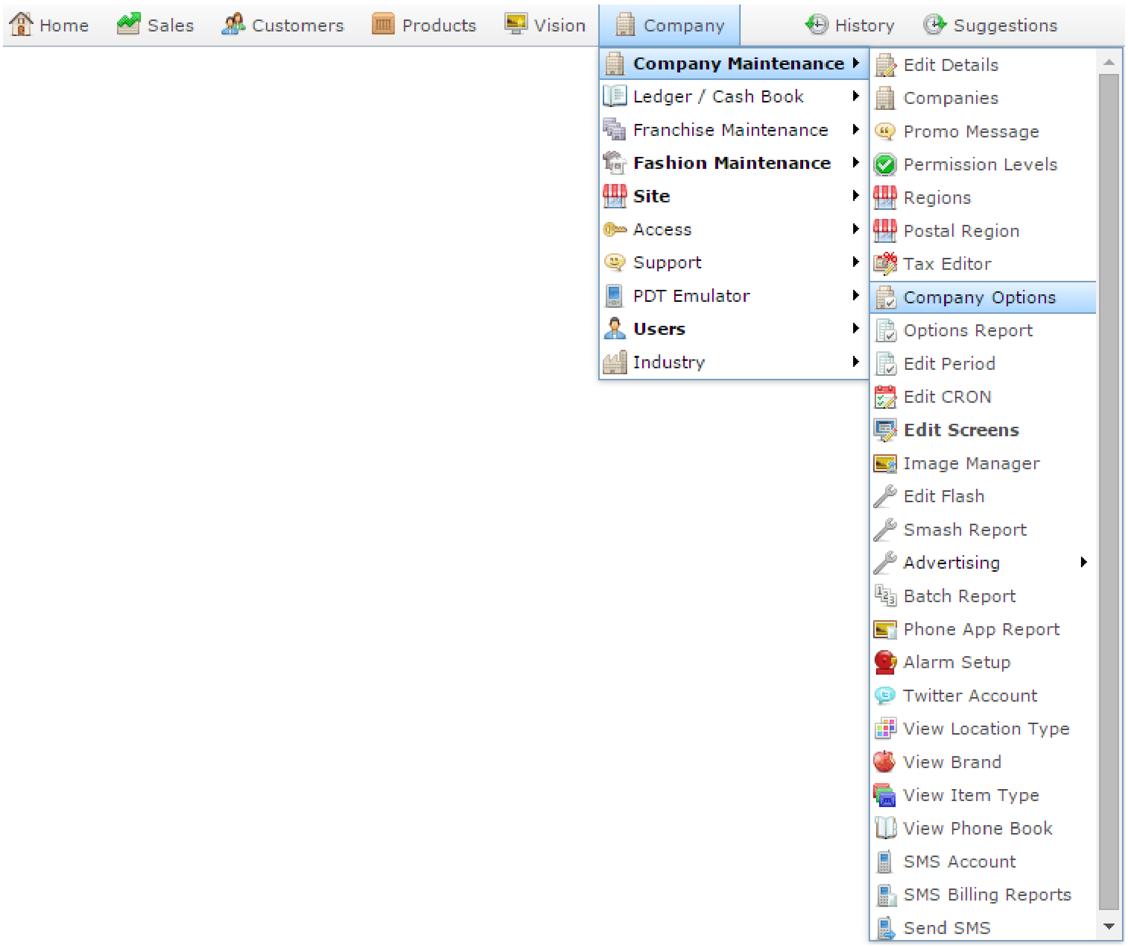
> **Note:** There are several sections for configuring loyalty within your company. Also see: *Configuring your company for loyalty information* on page 96, *Configuring your company for loyalty* on page 89,
> *Configuring your company for loyalty events* on page 104.

## Opening the Company Options - Loyalty Email section

To open the Company Options - Loyalty Email section:

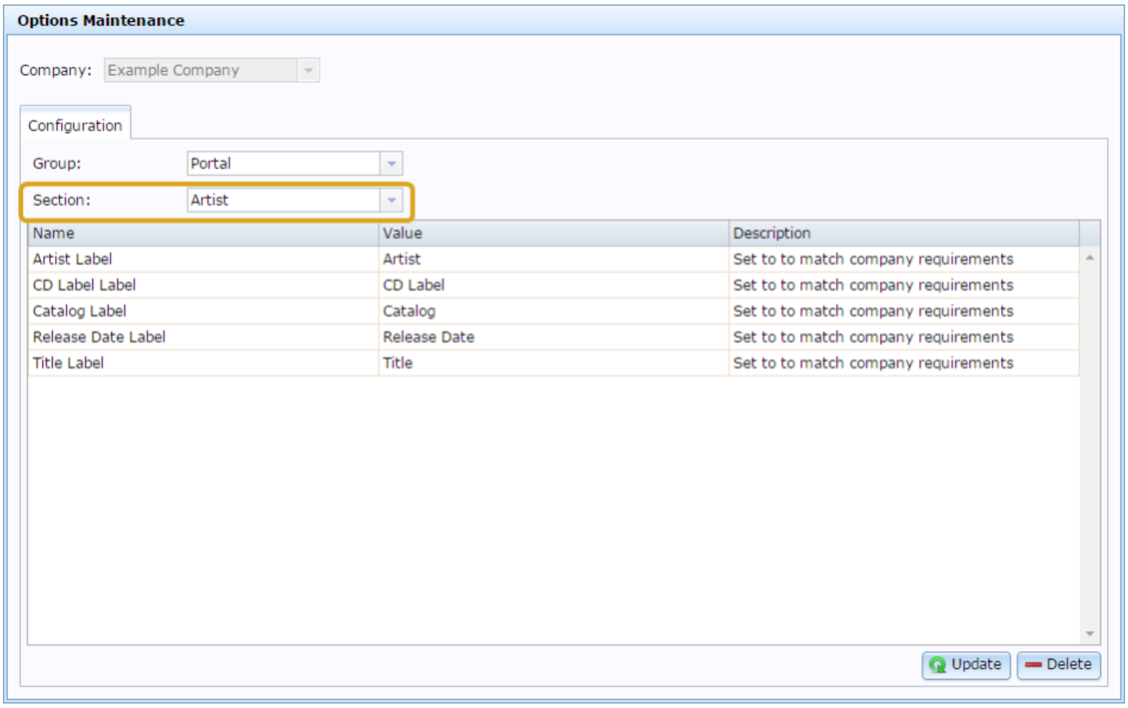
1. Press 

.
2. Press Company Maintenance > Company Options.



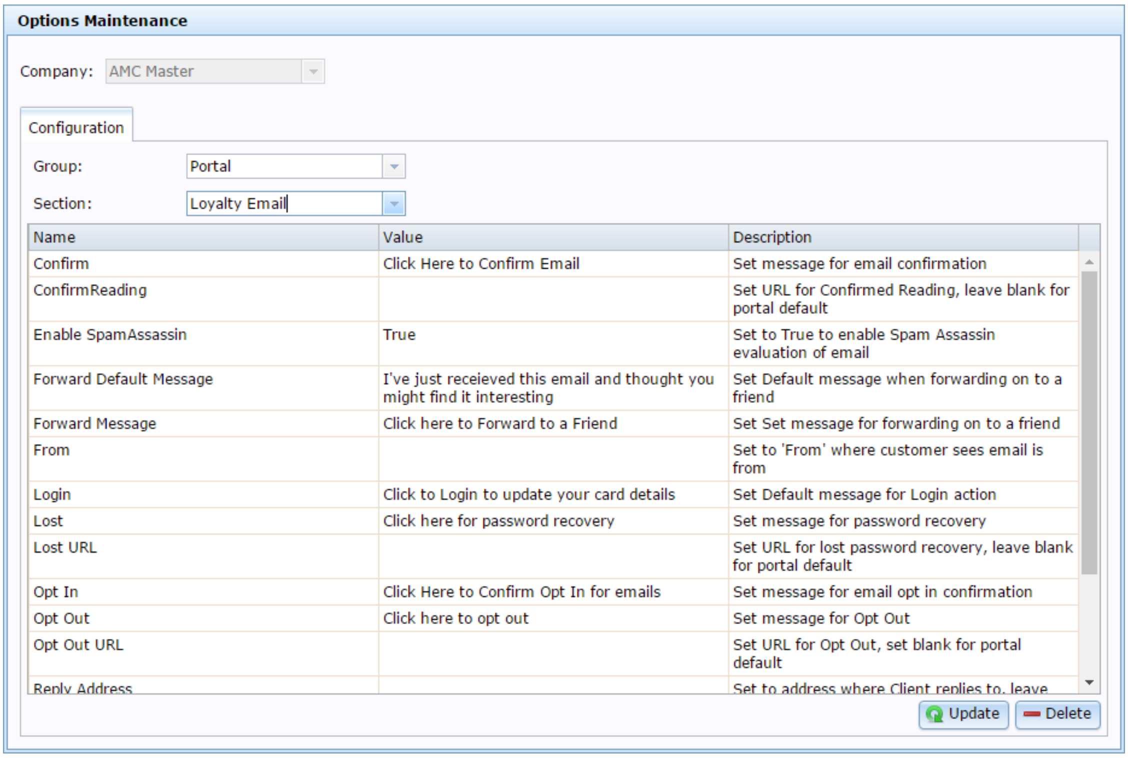

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.




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

The Loyalty Email section is displayed.



## Company Options - Loyalty Email section key fields and buttons

| Field | Description |
| --- | --- |
| **Confirm** | Type the message to be displayed for confirmation links in emails. |
| **ConfirmReading** | Type the URL the confirmation link leads to, or leave blank to use the Portal default. |
| **Enable SpamAssassin** | Type True to enable SpamAssassin email evaluation to ensure your email won't be automatically marked as spam. |
| **Forward Default Message** | Type the message to be displayed by default when marketing messages are forwarded. |
| **Forward Message** | Type the link to display that helps customers forward the email to a friend. |
| **From** | Type the name the email appears to be from. |
| **Login** | Type the message to display for login links. |
| **Lost** | Type the message to be displayed for recovering passwords. |

| Field | Description |
|---|---|
| **Lost URL** | Type the URL link for customers to recover their login password. Leave blank to use the Portal default. |
| **Opt In** | Type the message to display for opt-in links. |
| **Opt Out** | Type the message to display for opt-out links. |
| **Out Out URL** | Type the URL for customers to opt-out of further emails, or leave blank to use the Portal default. |
| **Reply Address** | Type the email address to send customer's replies to loyalty emails to. |
| **Return Address** | Type the email address to sent email server messages to, for example regarding emails that failed to send. |
| **Text** | Type the message to be displayed when the email is opened in a text-only viewer. |
| **View** | Type the message to be displayed for the link to view the email online. |

Company Maintenance
screen

# Configuring your company for loyalty events

Use the Company Options - Loyalty Events section to configure your company for customer loyalty reward systems.

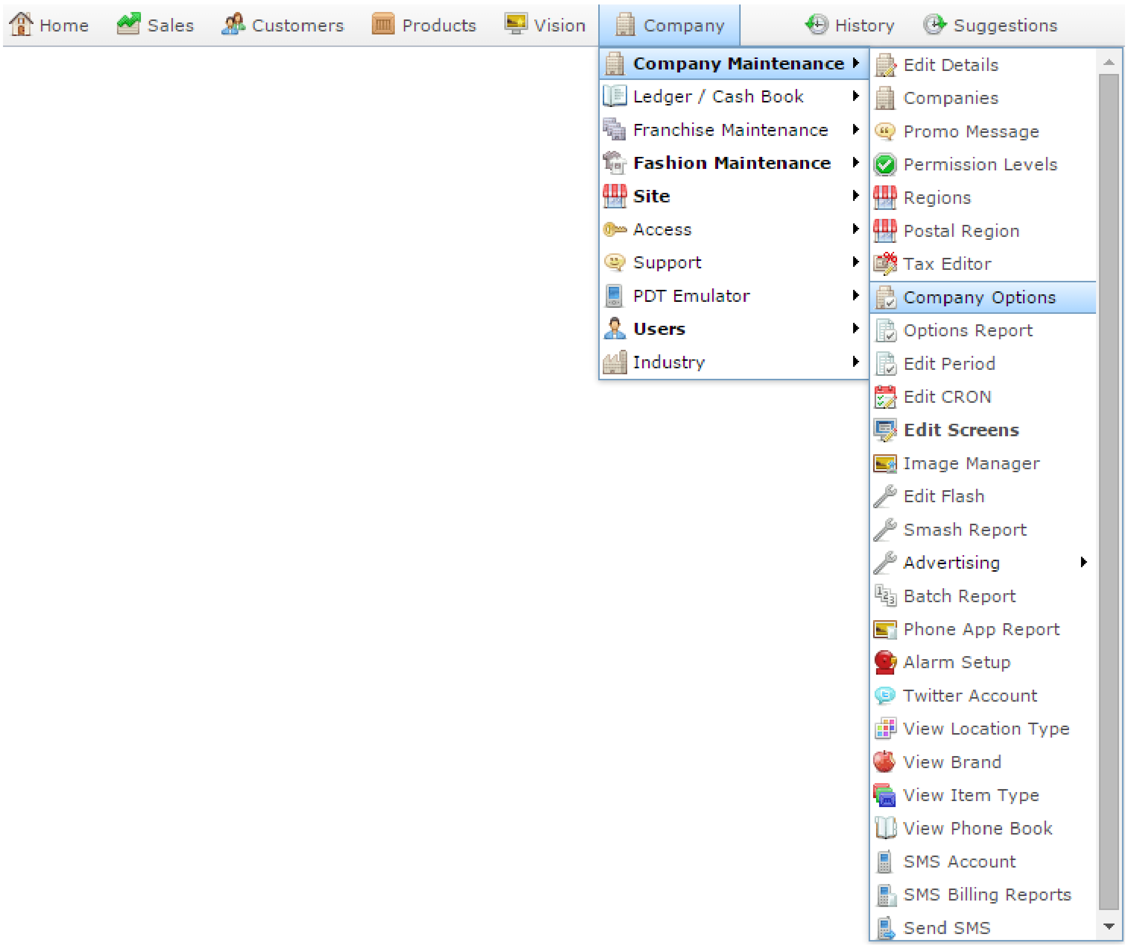
**Note:** There are several sections for configuring loyalty within your company. Also see: *Configuring your company for loyalty information* on page 96,
*Configuring your company for loyalty emails* on page 100, and
*Configuring your company for loyalty* on page 89.

## Opening the Company Options - Loyalty Events section

To open the Company Options - Loyalty Events section:

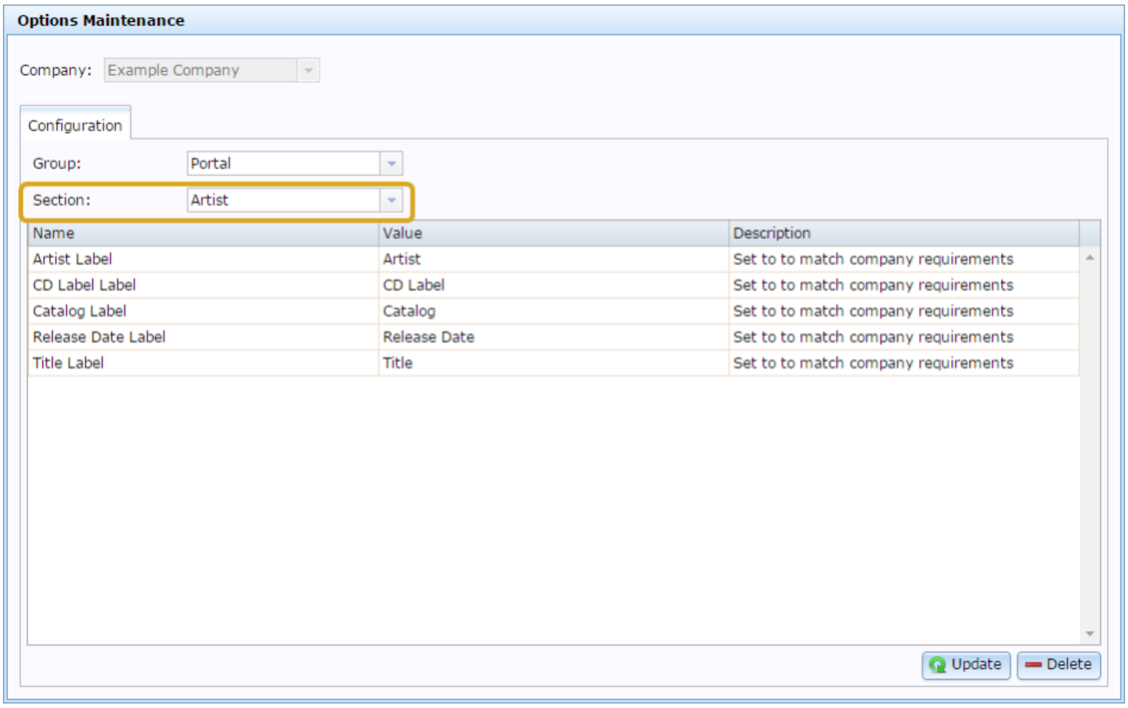
1. Press 

.
2. Press Company Maintenance > Company Options.



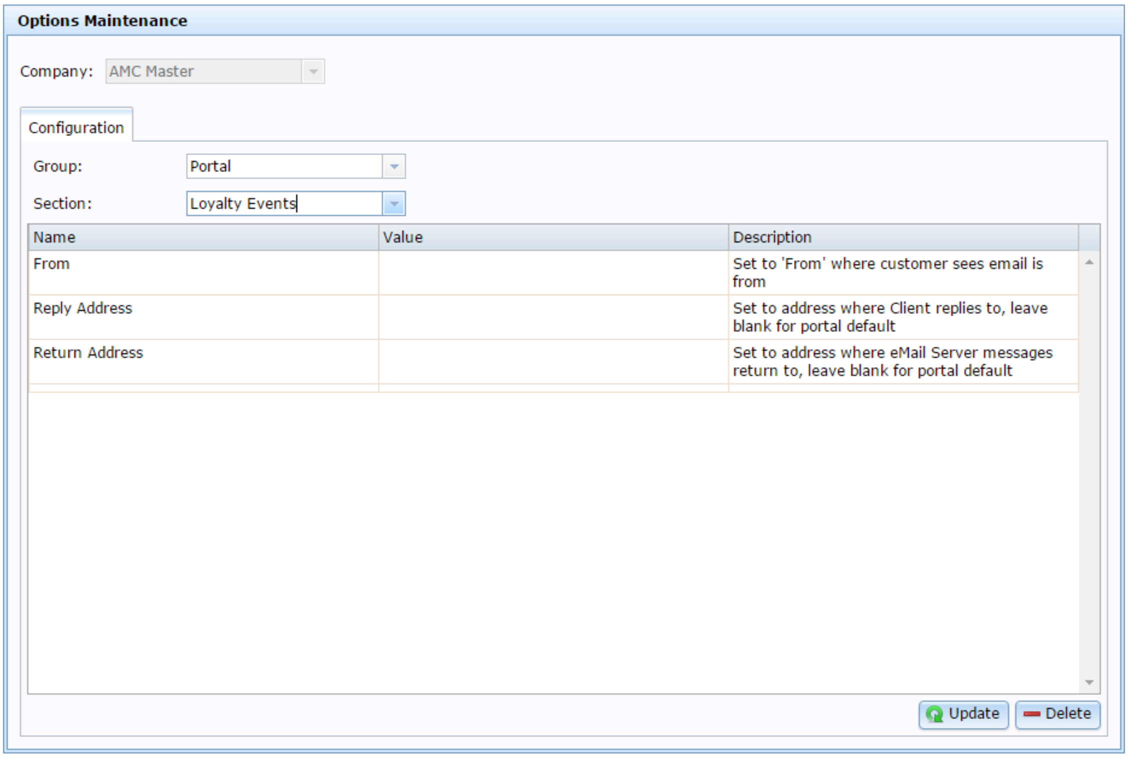

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.




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

   The Loyalty Events section is displayed.



## Company Options - Loyalty section key fields and buttons

| Field | Description |
|---|---|
| **From** | Set the 'from' name that appears in customer's inboxes as who the email is from. |
| **Reply Address** | Set the address that emails are directed to when a customer replies to a loyalty email.<br>If you want to use the Portal default, leave this field blank. |
| **Return Address** | Set the email address that messages from the server are sent to, for example regarding unsuccessful mailing attempts.<br>If you want to use the Portal default, leave this field blank. |

# Configuring your company for marketing

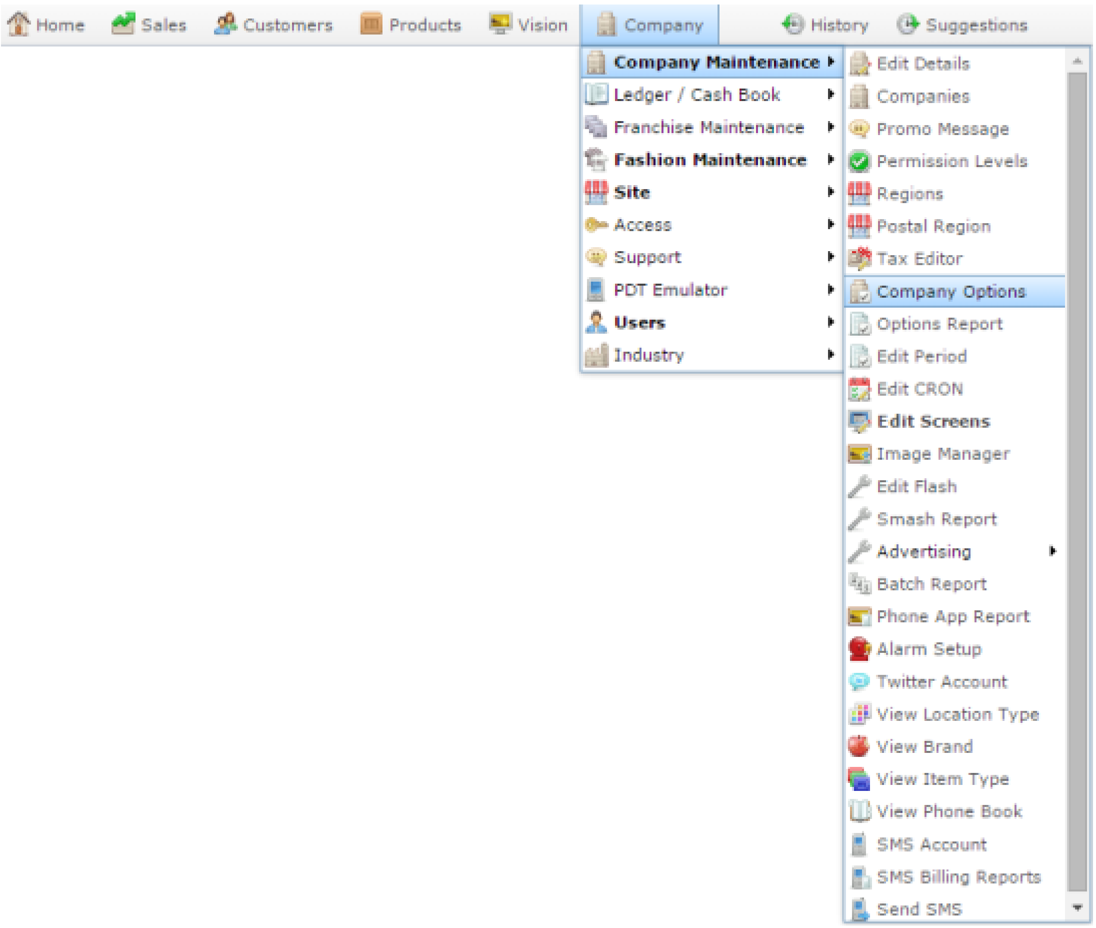
Use the Company Options - Marketing section to configure your company for marketing activities.

## Opening the Company Options - Marketing section

To open the Company Options - Marketing section:

1. Press 

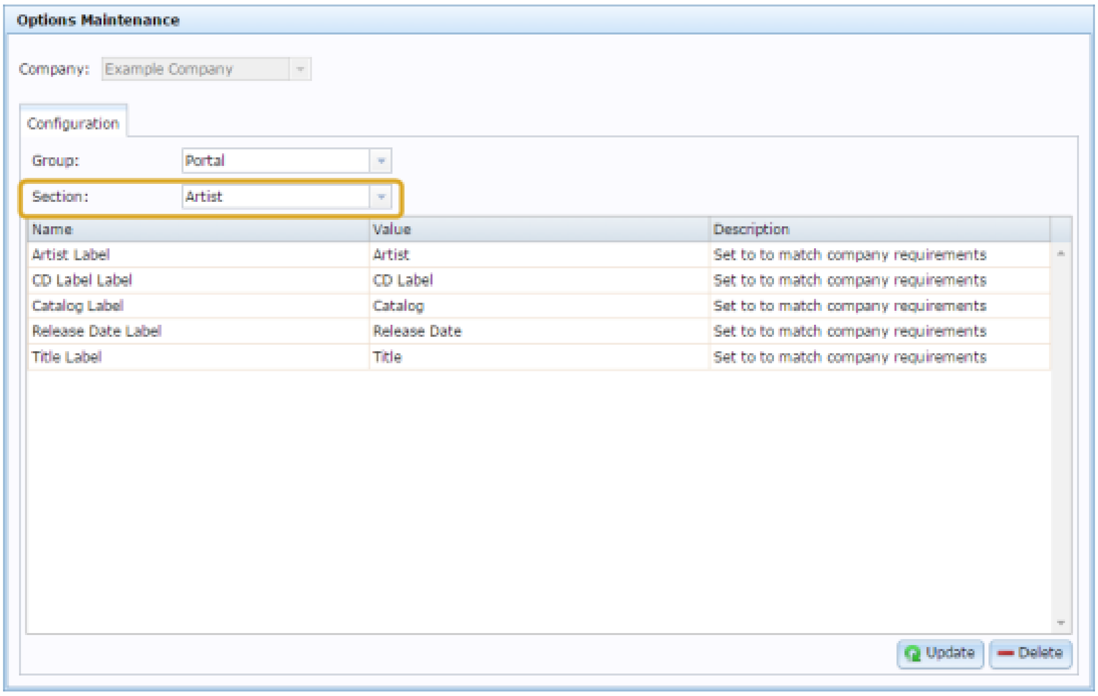
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.

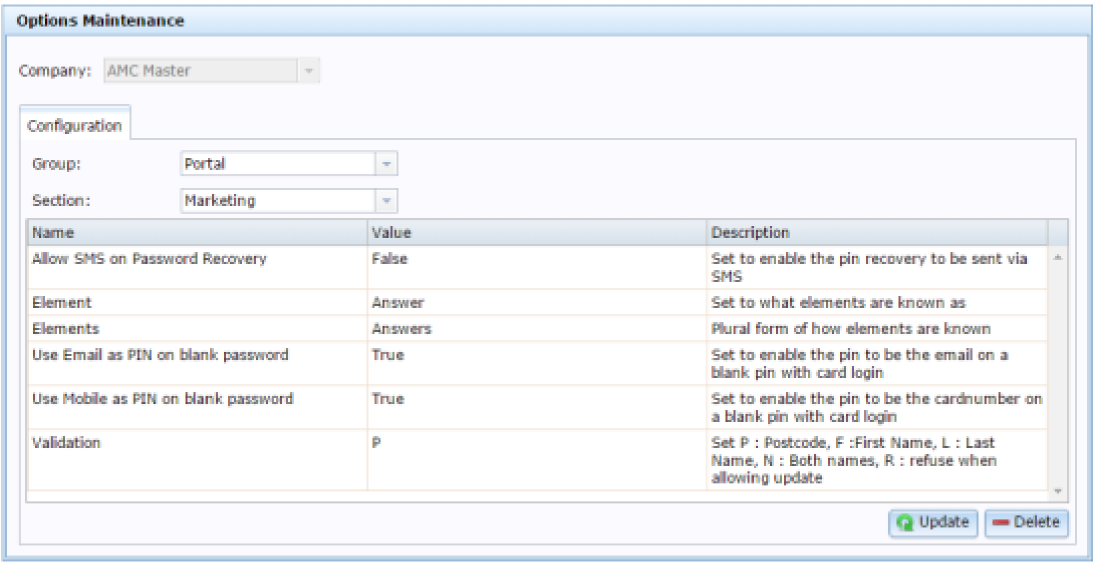
Company Maintenance screen




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

   The Marketing section is displayed.

   IMAGE



## Company Options - Marketing section key fields and buttons

| Field | Description |
|---|---|
| **Allow SMS on Password Recovery** | Type True to allow customers to recover their PIN via SMS message. |
| **Element** | Define the term used in the Portal for a marketing element. |
| **Elements** | Define the plural term used in the Portal for marketing elements. |
| **Use Email as PIN on blank password** | Type True to allow the member's email address to be used as the PIN with a blank password. |
| **Use Mobile as PIN on blank password** | Type True to allow the member's mobile number to be used as the PIN with a blank password. |

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Validation</td><td>Select what information is used to validate updates to the member's information:
<table>
<tr><th>Type</th><th>To use...</th></tr>
<tr><td>P</td><td>Customer's post code.</td></tr>
<tr><td>F</td><td>Customer's first name.</td></tr>
<tr><td>L</td><td>Customer's last name.</td></tr>
<tr><td>N</td><td>Customer's first and last name.</td></tr>
<tr><td>R</td><td>Disallow updates.</td></tr>
</table></td></tr>
</table>

# Configuring your company for marketing information

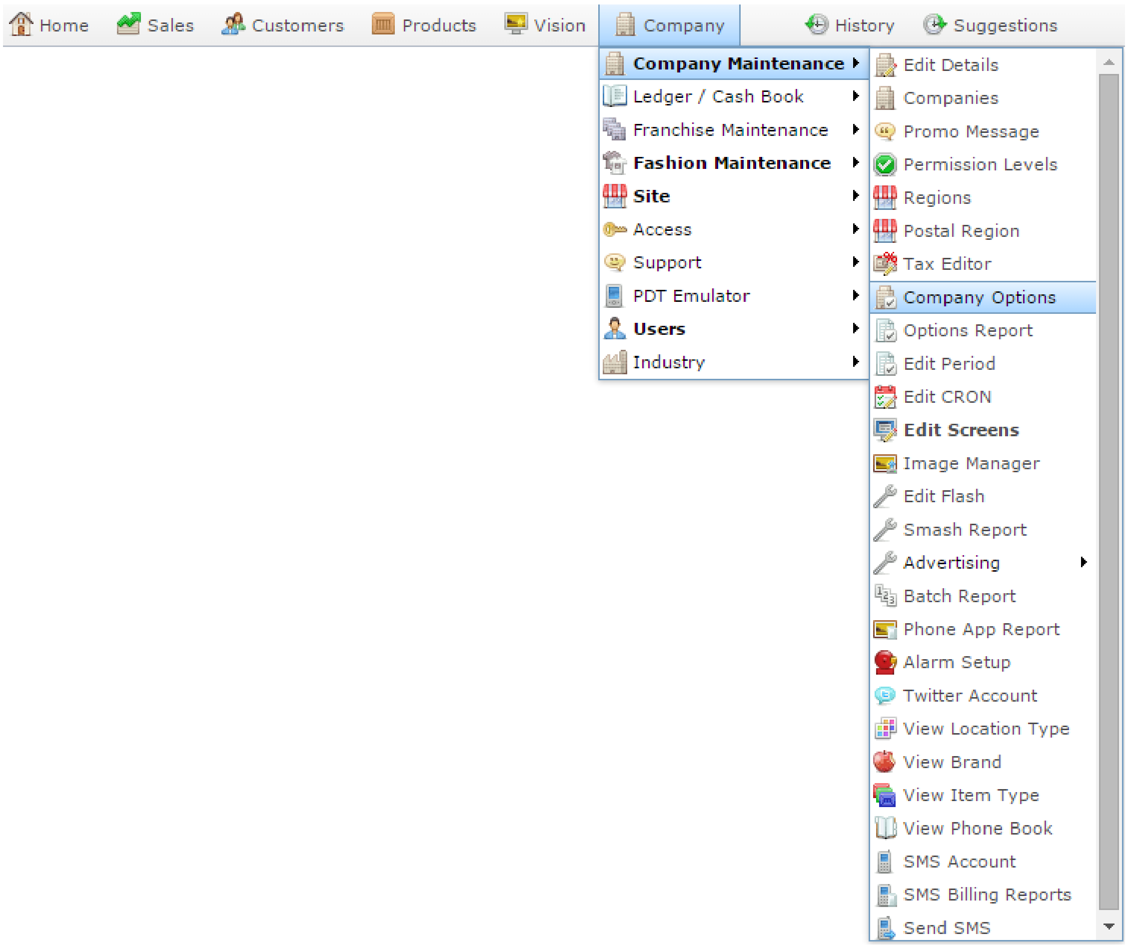
Use the Company Options - Marketing Compulsory section to configure what information the Portal configures compulsory for marketing customers.

**Note:** There are several sections for configuring marketing within your company. Also see: *Configuring your company for marketing* on page 107, *Configuring your company for marketing emails* on page 115, and *Configuring your company for marketing events* on page 120.

## Opening the Company Options - Marketing Compulsory section

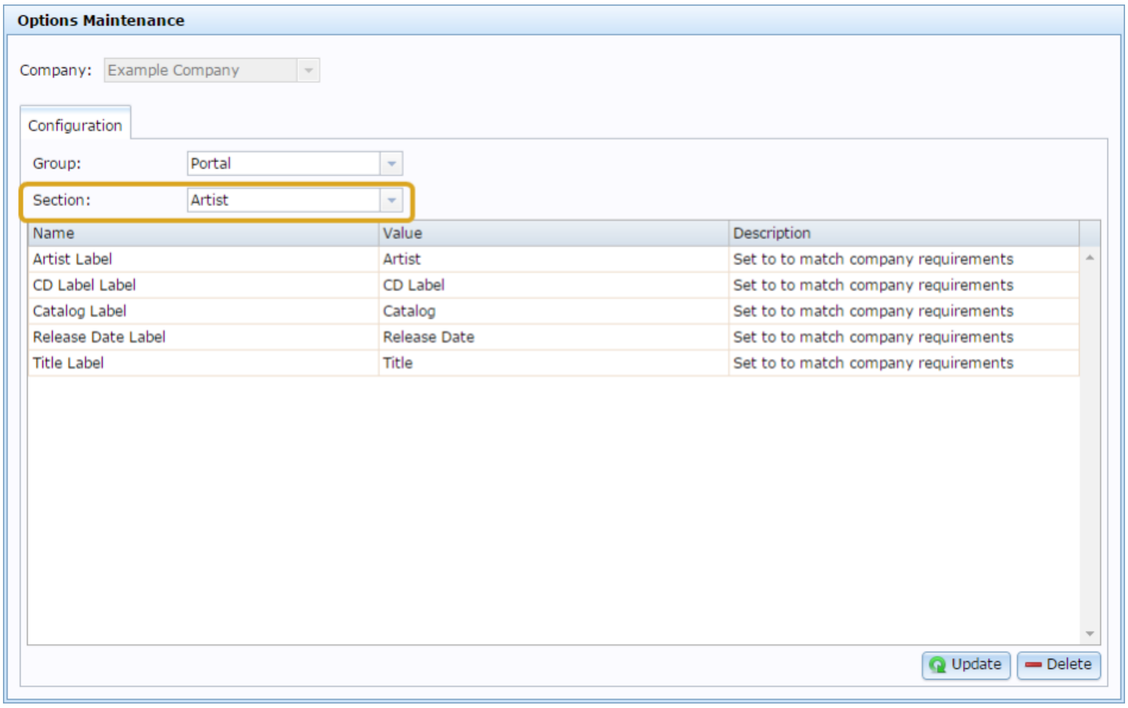
To open the Company Options - Marketing Compulsory section:

1. Press  .
2. Press Company Maintenance > Company Options.



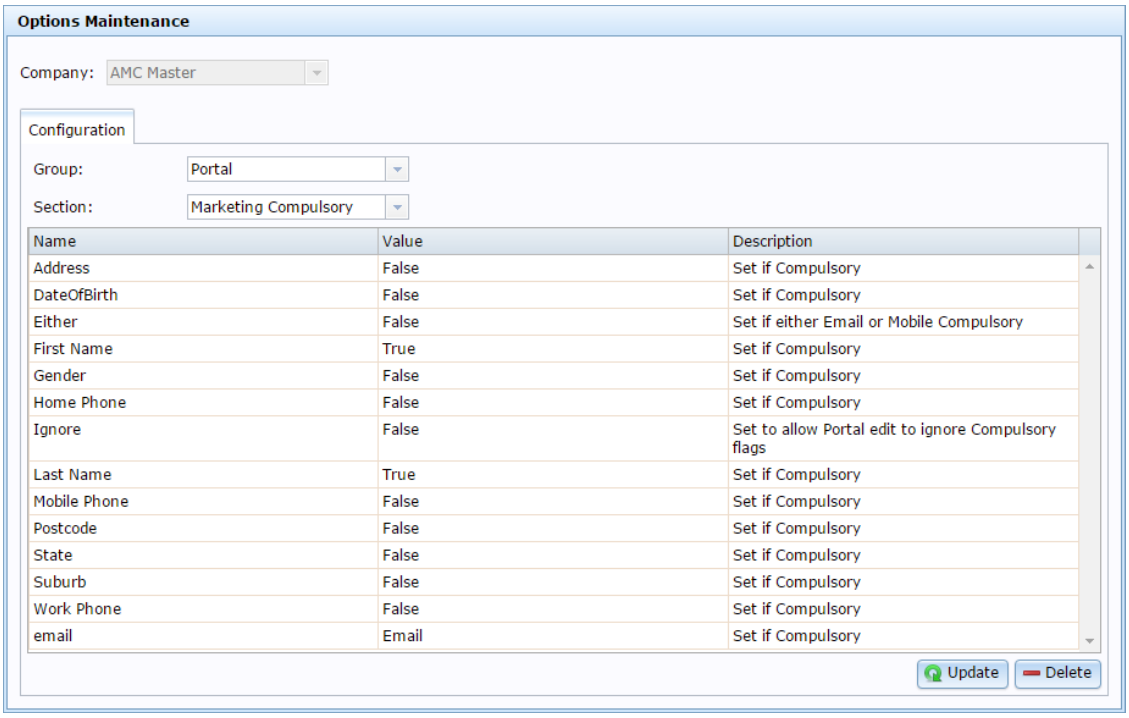

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.




4. Press Marketing Compulsory from the Section drop-down list.

   The Marketing Compulsory section is displayed.



## Company Options - Marketing Compulsory section key fields and buttons

| Field | Description |
| --- | --- |
| **Address** | Type True if the marketing member's address must be completed. |
| **Date of Birth** | Type True if the marketing member's date of birth must be completed. |
| **Either** | Type True if either the marketing member's email or mobile number must be completed. |
| **First Name** | Type True if the marketing member's first name must be completed. |
| **Gender** | Type True if the marketing member's gender must be completed. |
| **Home Phone** | Type True if the marketing member's home phone number must be completed. |

| Field | Description |
| --- | --- |
| **Ignore** | Type True if Portal operators can ignore compulsory fields when they edit marketing records through the Portal, for example edit a marketing member and delete an incorrect address, even though the address field is compulsory. |
| **Last Name** | Type True if the marketing member's last name must be completed. |
| **Mobile Phone** | Type True if the marketing member's mobile phone number must be completed. |
| **Postcode** | Type True if the marketing member's post code must be completed. |
| **State** | Type True if the marketing member's state must be completed. |
| **Suburb** | Type True if the marketing member's suburb must be completed. |
| **Work Phone** | Type True if the marketing member's work phone number must be completed. |
| **Email** | Type True if the marketing member's email must be completed. |

# Configuring your company for marketing emails

Use the Company Options - Marketing Email section to configure your company for customer marketing emails.

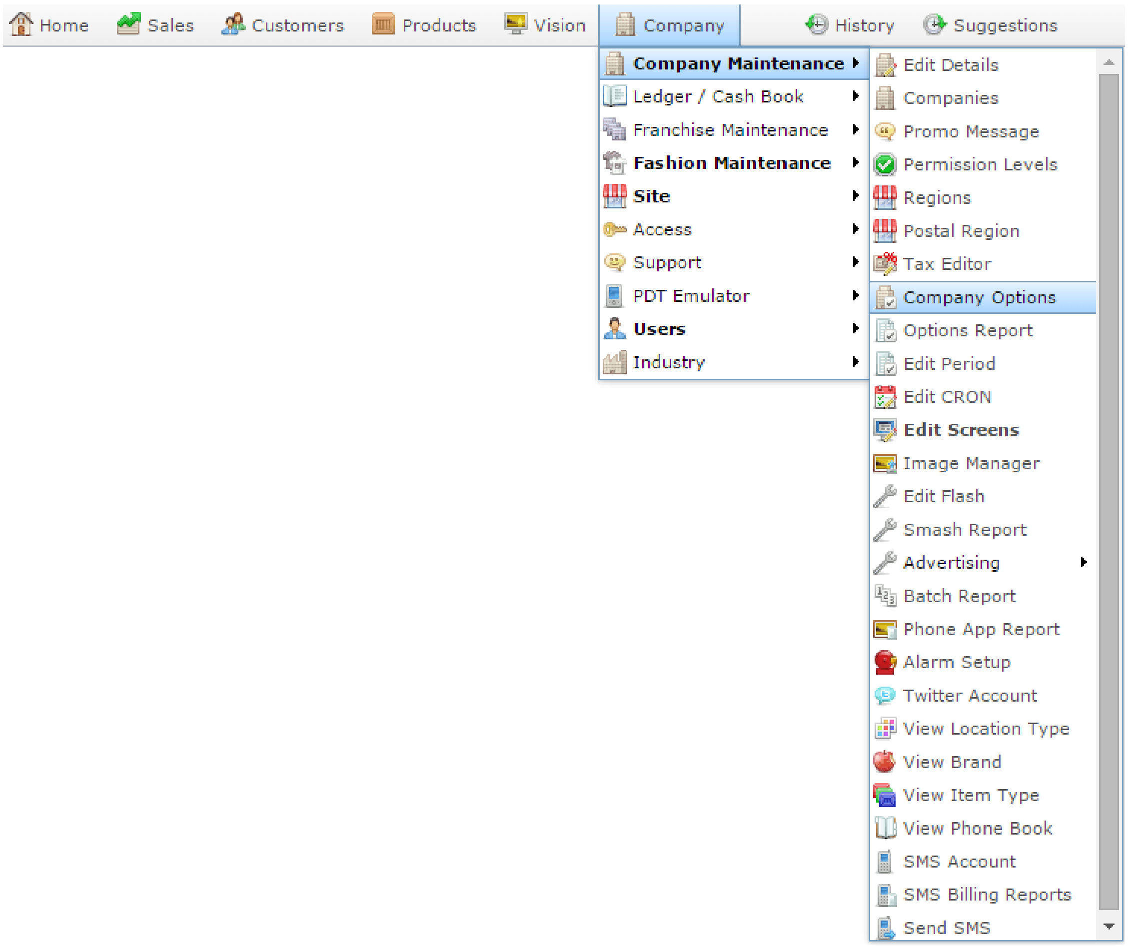
**Note:** There are several sections for configuring marketing within your company. Also see: *Configuring your company for marketing* on page 107, *Configuring your company for marketing information* on page 111, and *Configuring your company for marketing events* on page 120.

## Opening the Company Options - Marketing Email section

To open the Company Options - Marketing Email section:

1. Press 

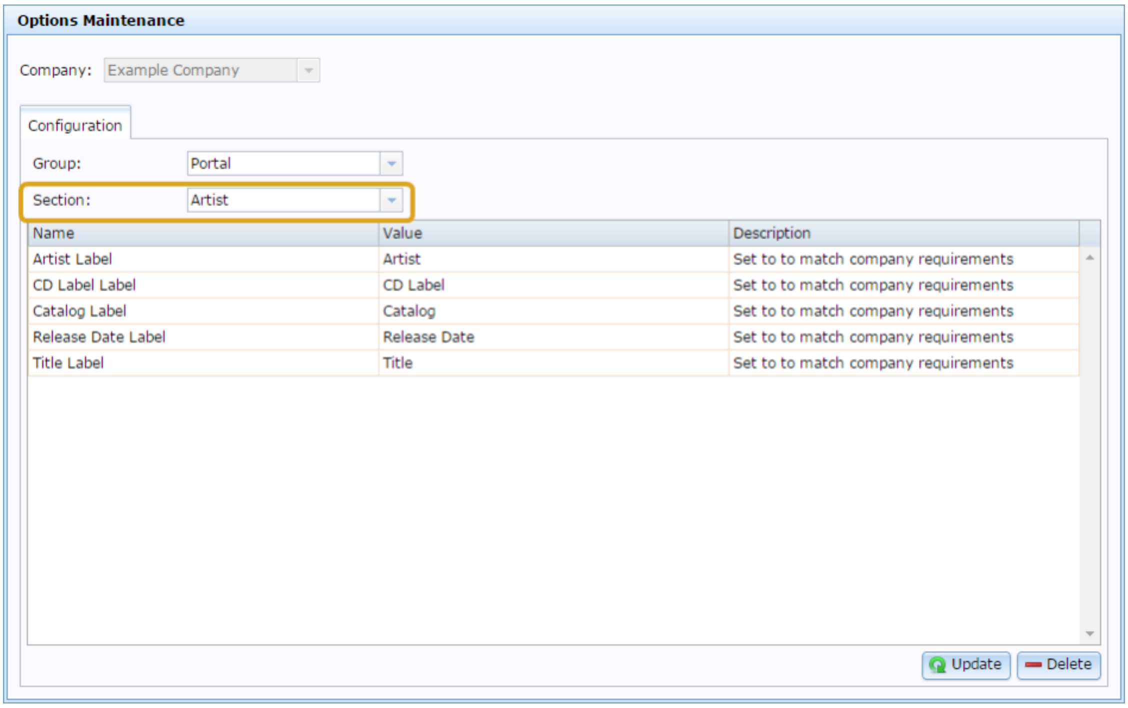
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

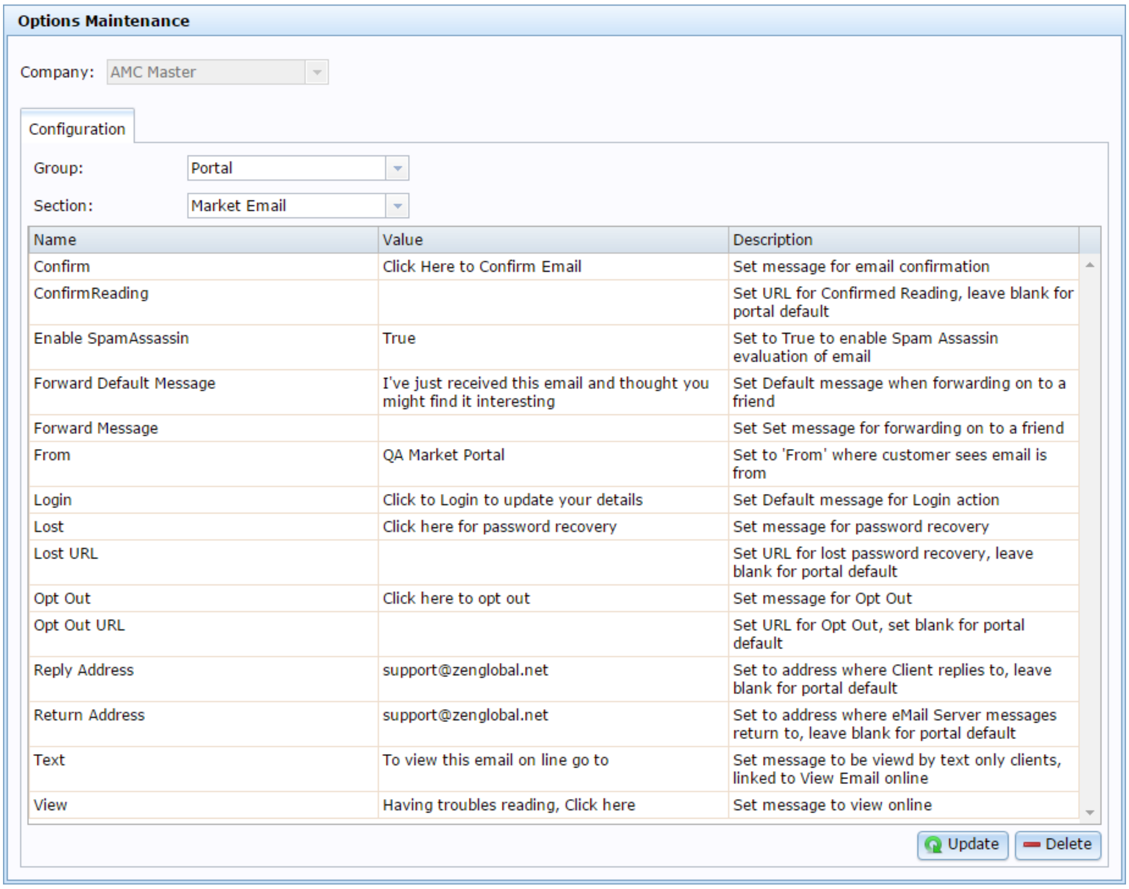
Company Maintenance screen

3. Open the Section drop-down list.




4. Press Marketing Email from the Section drop-down list.

   The Marketing Email section is displayed.



**Options Maintenance**

Company: AMC Master

Configuration

Group: Portal

Section: Market Email

| Name | Value | Description |
|---|---|---|
| Confirm | Click Here to Confirm Email | Set message for email confirmation |
| ConfirmReading | | Set URL for Confirmed Reading, leave blank for portal default |
| Enable SpamAssassin | True | Set to True to enable Spam Assassin evaluation of email |
| Forward Default Message | I've just received this email and thought you might find it interesting | Set Default message when forwarding on to a friend |
| Forward Message | | Set Set message for forwarding on to a friend |
| From | QA Market Portal | Set to 'From' where customer sees email is from |
| Login | Click to Login to update your details | Set Default message for Login action |
| Lost | Click here for password recovery | Set message for password recovery |
| Lost URL | | Set URL for lost password recovery, leave blank for portal default |
| Opt Out | Click here to opt out | Set message for Opt Out |
| Opt Out URL | | Set URL for Opt Out, set blank for portal default |
| Reply Address | support@zenglobal.net | Set to address where Client replies to, leave blank for portal default |
| Return Address | support@zenglobal.net | Set to address where eMail Server messages return to, leave blank for portal default |
| Text | To view this email on line go to | Set message to be viewd by text only clients, linked to View Email online |
| View | Having troubles reading, Click here | Set message to view online |

Update Delete

## Company Options - Marketing Email sectio key fields and buttonss

| Field | Description |
|---|---|
| **Confirm** | Type the message to be displayed for confirmation links in emails. |
| **ConfirmReading** | Type the URL the confirmation link leads to, or leave blank to use the Portal default. |
| **Enable SpamAssassin** | Type True to enable SpamAssassin email evaluation to ensure your email won't be automatically marked as spam. |
| **Forward Default Message** | Type the message to be displayed by default when marketing messages are forwarded. |
| **Forward Message** | Type the link to display that helps customers forward the email to a friend. |
| **From** | Type the name the email appears to be from. |
| **Login** | Type the message to display for login links. |
| **Lost** | Type the message to be displayed for recovering passwords. |

| Field | Description |
|---|---|
| **Lost URL** | Type the URL link for customers to recover their login password. Leave blank to use the Portal default. |
| **Opt In** | Type the message to display for opt-in links. |
| **Opt Out** | Type the message to display for opt-out links. |
| **Out Out URL** | Type the URL for customers to opt-out of further emails, or leave blank to use the Portal default. |
| **Reply Address** | Type the email address to send customer's replies to marketing emails to. |
| **Return Address** | Type the email address to sent email server messages to, for example regarding emails that failed to send. |
| **Text** | Type the message to be displayed when the email is opened in a text-only viewer. |
| **View** | Type the message to be displayed for the link to view the email online. |

Company Maintenance
screen

# Configuring your company for marketing events

Use the Company Options - Marketing Events section to configure your company for customer marketing reward systems.

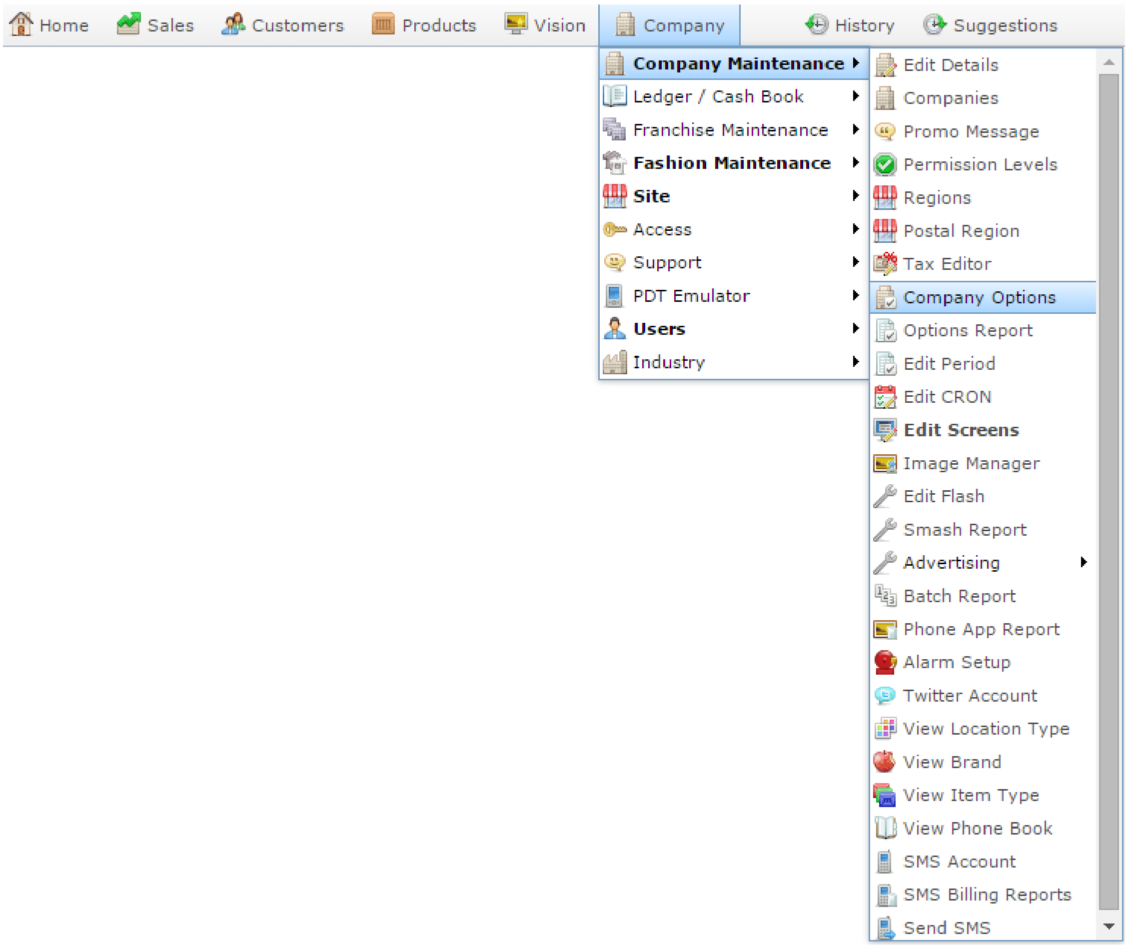
**Note:** There are several sections for configuring marketing within your company. Also see: *Configuring your company for marketing information* on page 111, *Configuring your company for marketing emails* on page 115, and *Configuring your company for marketing* on page 107.

## Opening the Company Options - Marketing Events section

To open the Company Options - Marketing Events section:

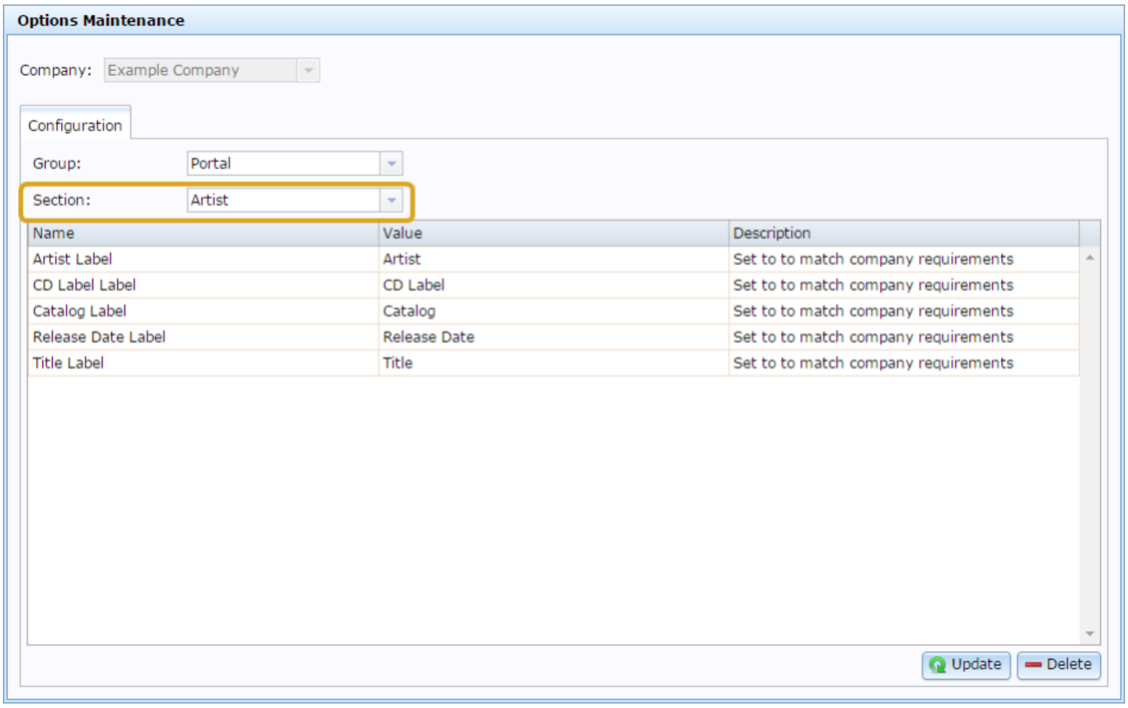
1. Press 

.
2. Press Company Maintenance > Company Options.



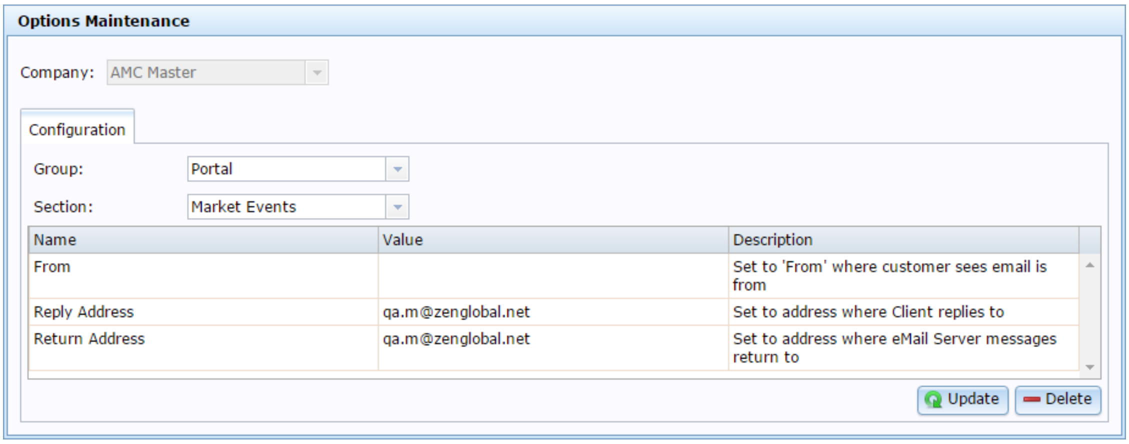

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.




4. Press Marketing Eventsfrom the Section drop-down list.

   The Marketing Events section is displayed.



## Company Options - Marketing section key fields and buttons

| Field | Description |
| --- | --- |
| **From** | Set the 'from' name that appears in customer's inboxes as who the email is from. |
| **Reply Address** | Set the address that emails are directed to when a customer replies to a marketing email.<br><br>If you want to use the Portal default, leave this field blank. |
| **Return Address** | Set the email address that messages from the server are sent to, for example regarding unsuccessful mailing attempts.<br><br>If you want to use the Portal default, leave this field blank. |

# Configuring your company to use Metcash

Use the Company Options - Metcash section to configure your company to use a Metcash account.

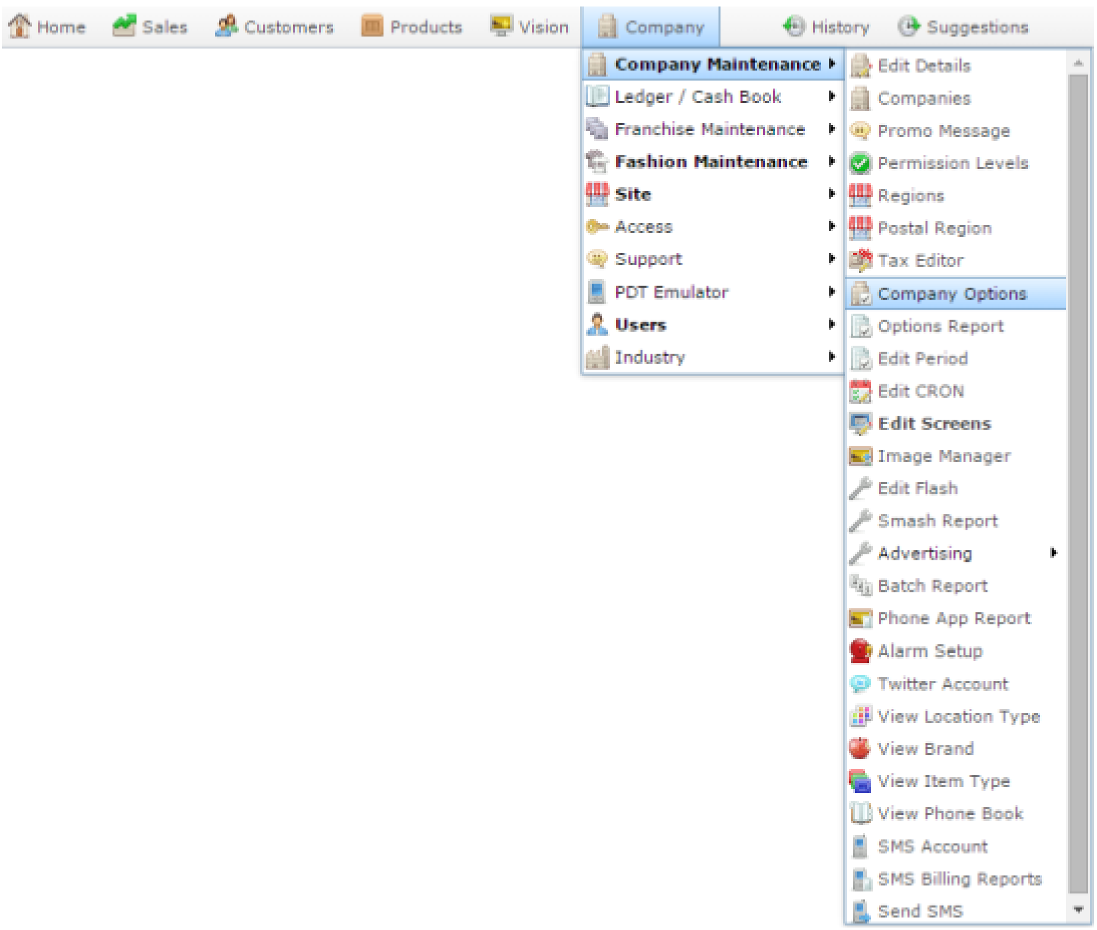
**Note:** You must request your configuration values from your Metcash liaison. Configure the Portal values to match the information you are given.

## Opening the Company Options - Metcash section

To open the Company Options - Metcash section:

1. Press 

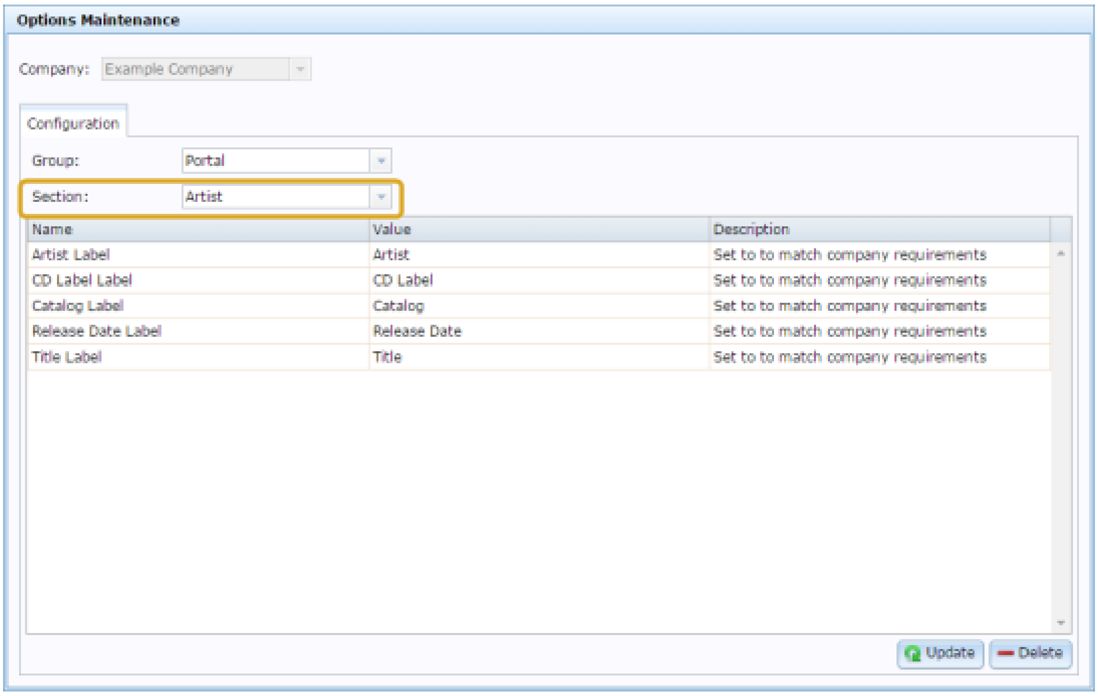
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

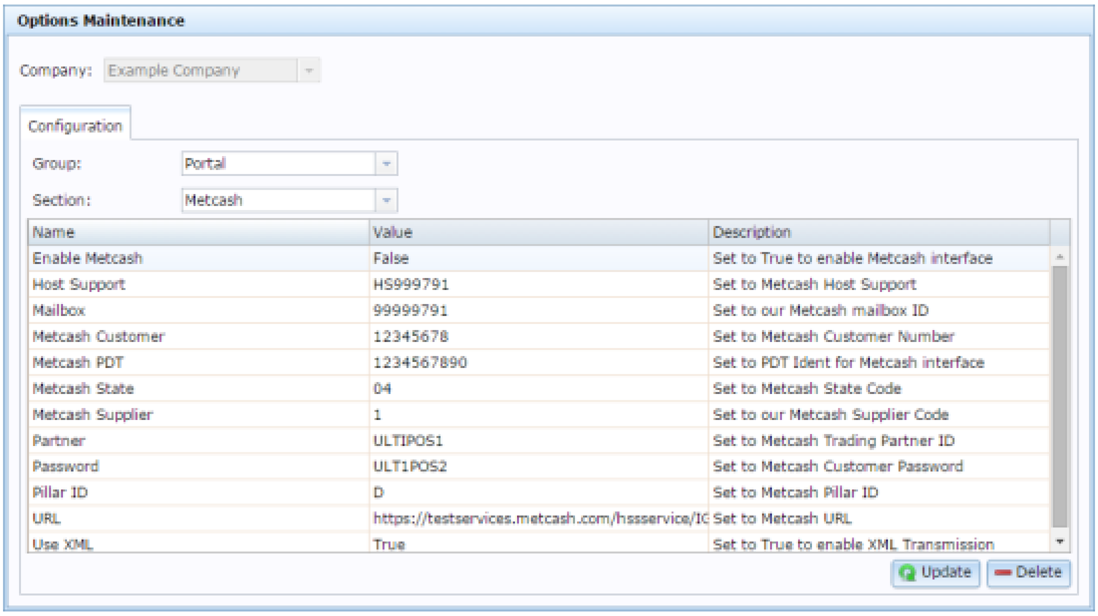
3. Open the Section drop-down list.

Company Maintenance screen




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

The Metcash section is displayed.



## Company Options - Metcash section key fields and buttons

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

| Name | Value | Description |
|---|---|---|
| Example Field Name | Example Value | Description of configuration |

| Configuration | Description |
|---|---|
| **Enable Metcash** | Type True to set the Portal to use the Metcash interface with suppliers. |
| **Host Support** | Type your Metcash host support number. |
| **Mailbox** | Type your Metcash mailbox ID number. |
| **Metcash Customer** | Type your Metcash customer or account number. |
| **Metcash PDT** | Type your PDT identification code for the Metcash interface. |
| **Metcash State** | Type your Metcash state code. |
| **Metcash Supplier** | Type your Metcash supplier code. |

| Configuration | Description |
|---|---|
| **Partner** | Type your Metcash trading partner's ID code. |
| **Password** | Type your Metcash customer account password. |
| **Pillar ID** | Type your Metcash pillar ID. |
| **URL** | Type the Metcash URL you want the Portal to send Metcash requests to. |
| **Use XML** | Type True to use XML for Metcash transactions.<br>**Note:** It is recommended to set this to True. If **False**, the Portal uses the previous text interface of Metcash which has been discontinued. |

# Configuring pallets for your company

Use the Company Options - Pallet section to configure how your company uses pallets when receiving or invoicing stock.

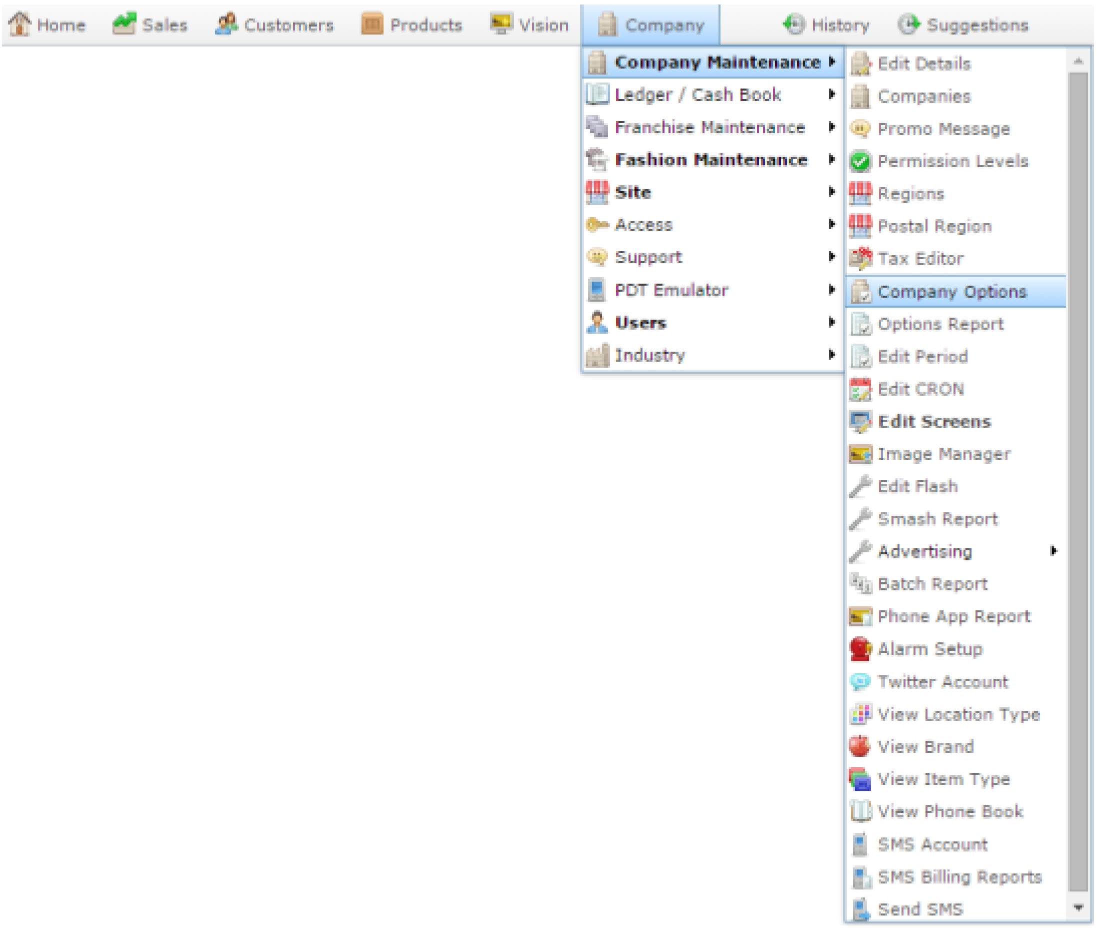
The pallets feature allows you to scan barcodes that encode the item code, weight or quantity, price, use-by date and manufacturer in a serial number. This can be used to track the carton through your inventory and note expired or lost cartons.

## Opening the Company Options - Pallet section

To open the Company Options - Pallet section:

1. Press 

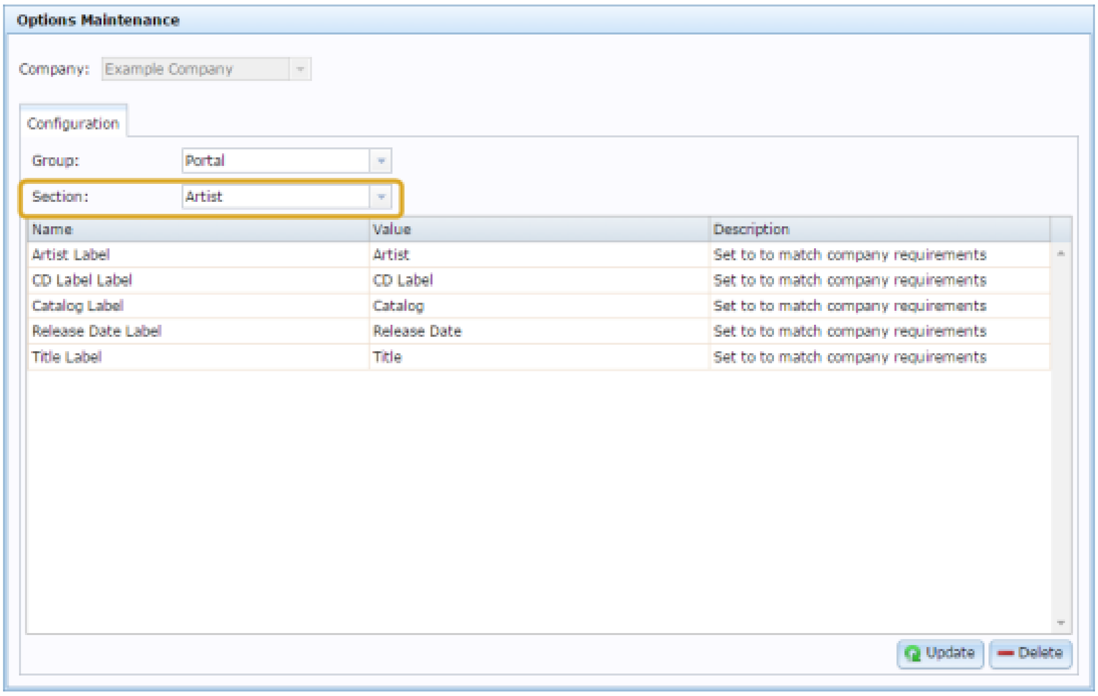
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

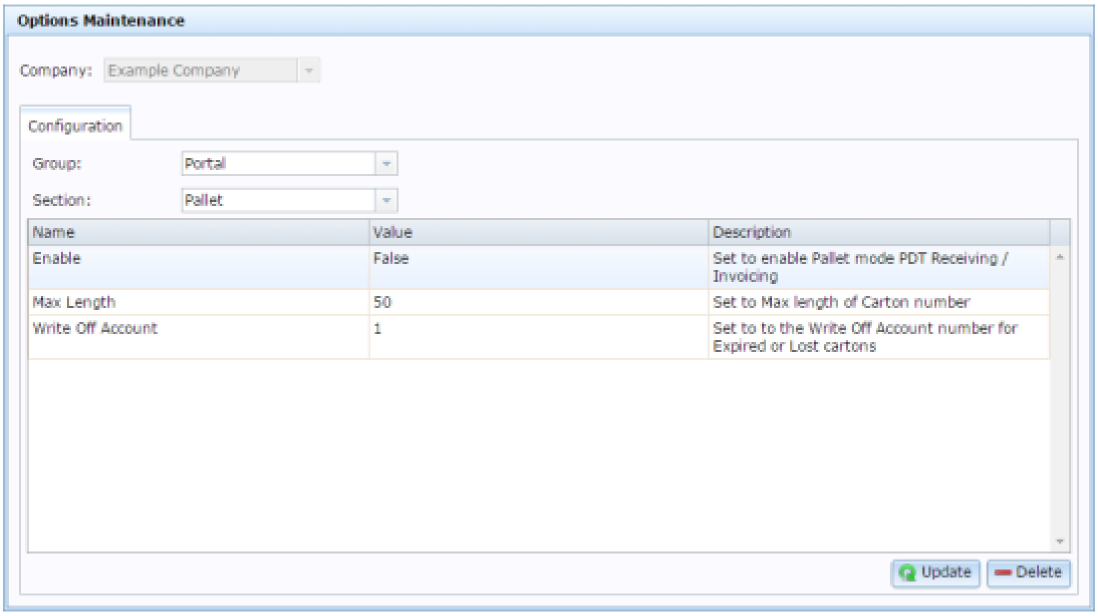
3. Open the Section drop-down list.

Company Maintenance screen



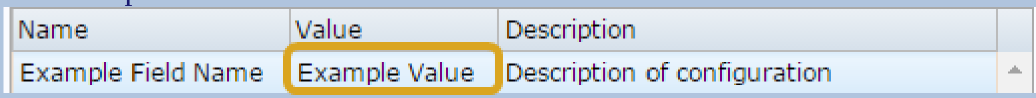

4. Select Pallet from the Section drop-down list.

   The Pallet section is displayed.



## Company Options - Pallet section key fields and buttons

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




| Configuration | Description |
| --- | --- |
| **Enable** | Type True to use the Pallet mode when receiving or invoicing using a PDT. |
| **Fixture** | Type the unique code for the fixture that stores your receipted items. |
| **GTIN Length** | Type the number of digits used in the item's Global Trade Item Number (GTIN). |
| **KG** | Type the number of kilograms per carton for use in purchase orders. Kilograms ordered are converted into number of pallets during the order process. |
| **Max Length** | Type the maximum number of digits in a carton scan number. Cartons with a number longer than this are rejected by the Portal as incorrect. |

| Configuration | Description |
|---|---|
| **Must Be Received** | Type True to require a pallet to be received before it can be dispatched. |
| **Write Off Account** | Type the ledger code or account number to be used when writing off expired or lost cartons. |

# Configuring your company for PDI

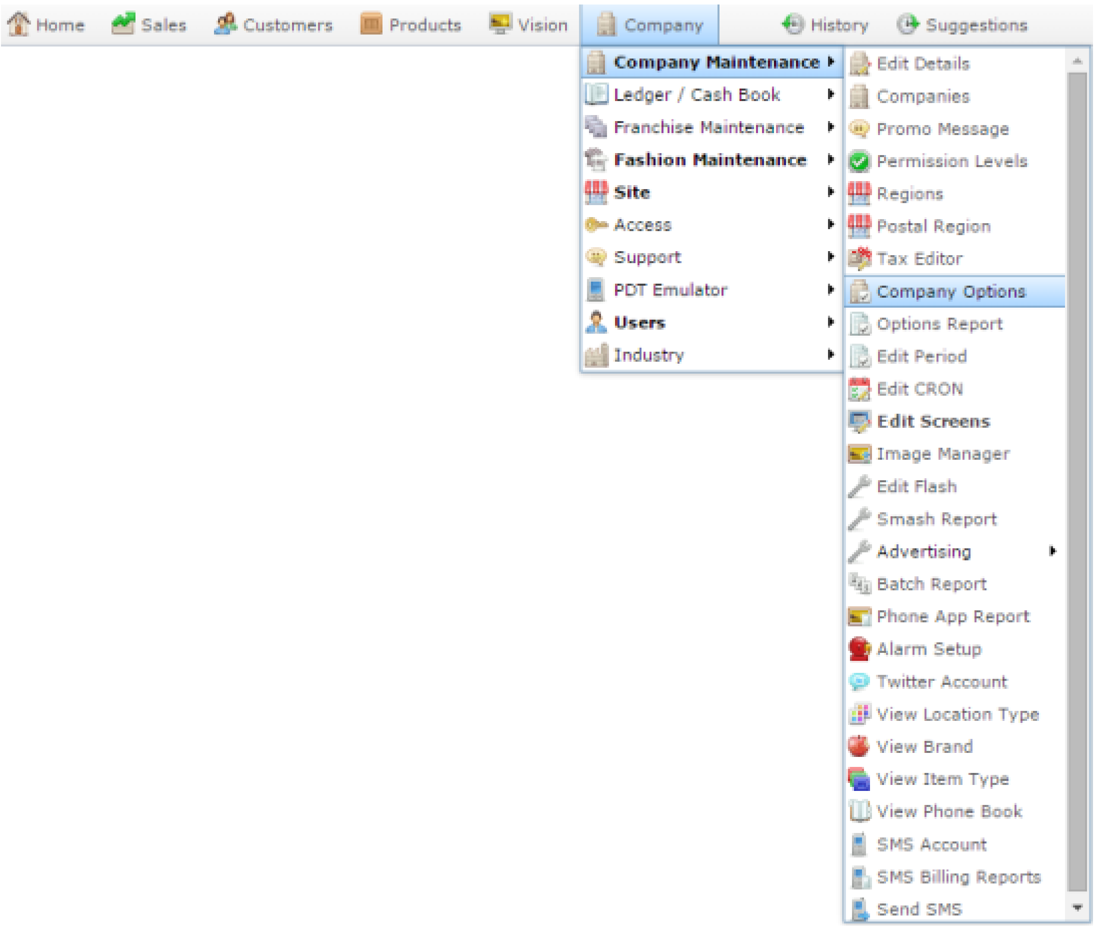
Use the Company Options - PDI section to configure your company to use the Portal Data Interchange to speed up your purchasing and receipting workflow with other companies that also use the Portal. See *Using the Portal Data Interchange (PDI)*.

## Opening the Company Options - PDI section

To open the Company Options - PDI section:

1. Press 

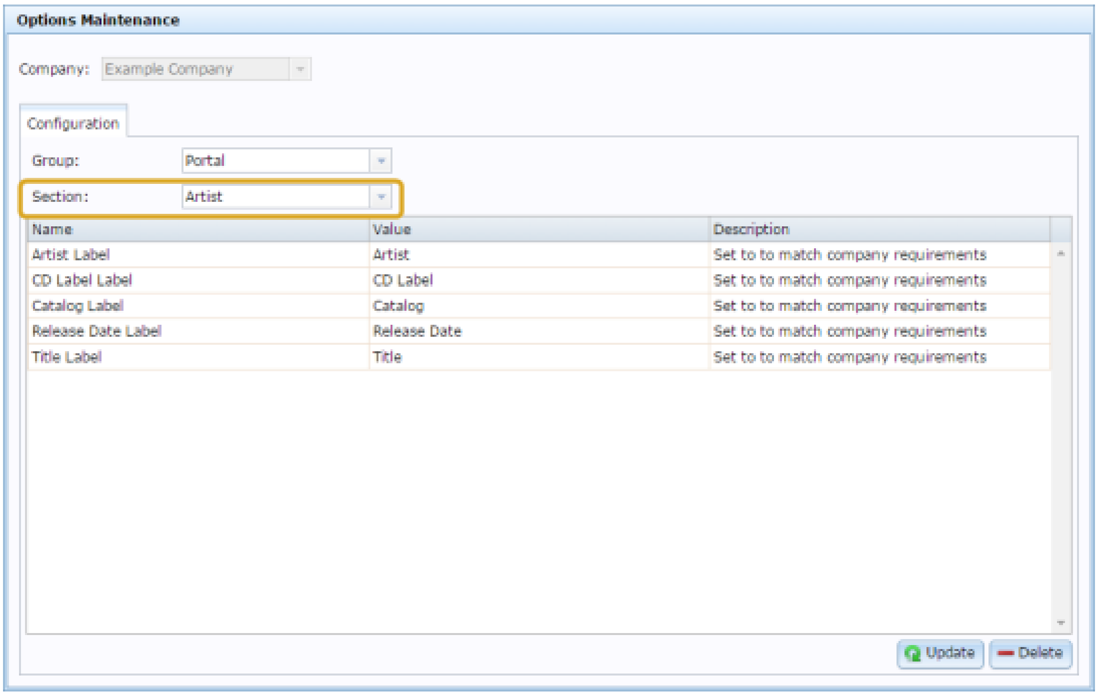
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

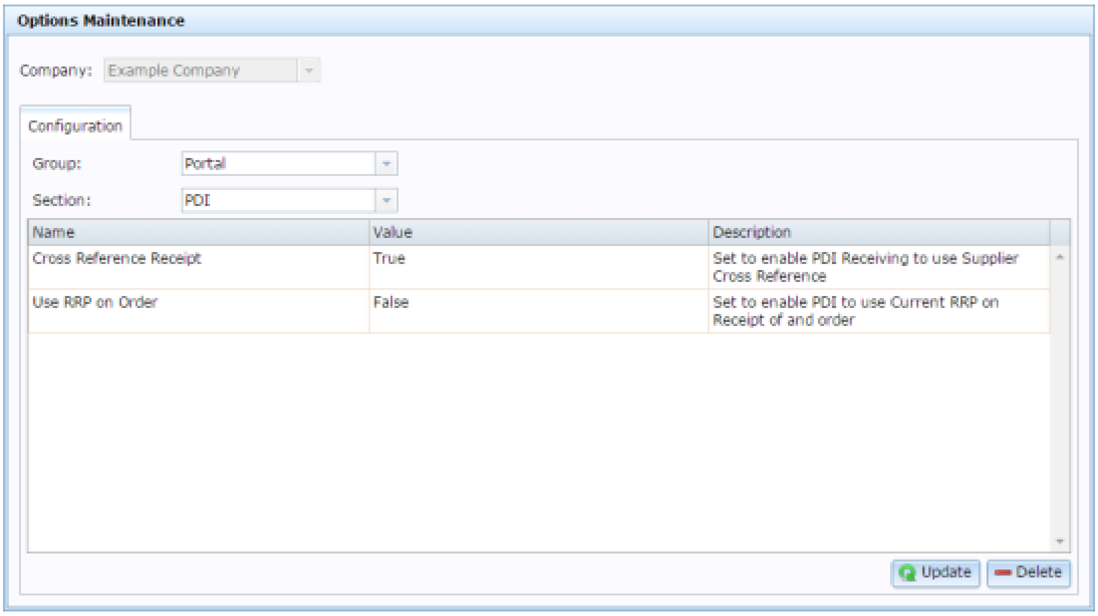
3. Open the Section drop-down list.

Company Maintenance screen

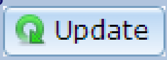



4. Select PDI from the Section drop-down list.

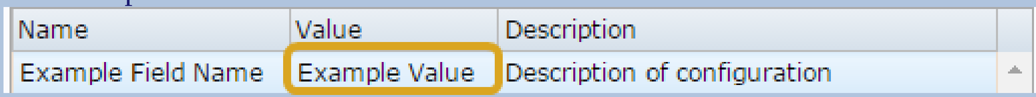
   The PDI section is displayed.



## Company Options - PDI section key fields and buttons

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

.



| Name | Value | Description |
|---|---|---|
| Example Field Name | Example Value | Description of configuration |

| Configuration | Description |
|---|---|
| **Cross Reference Receipt** | Type True to use supplier cross reference codes when creating receipts using the Portal data interchange. |
| **Use RRP on Order** | Type true to use the recommended retail price when generating customer orders and stock receipts using the Portal data interchange. |

Company Maintenance
screen

# Configuring the price matrix for your company

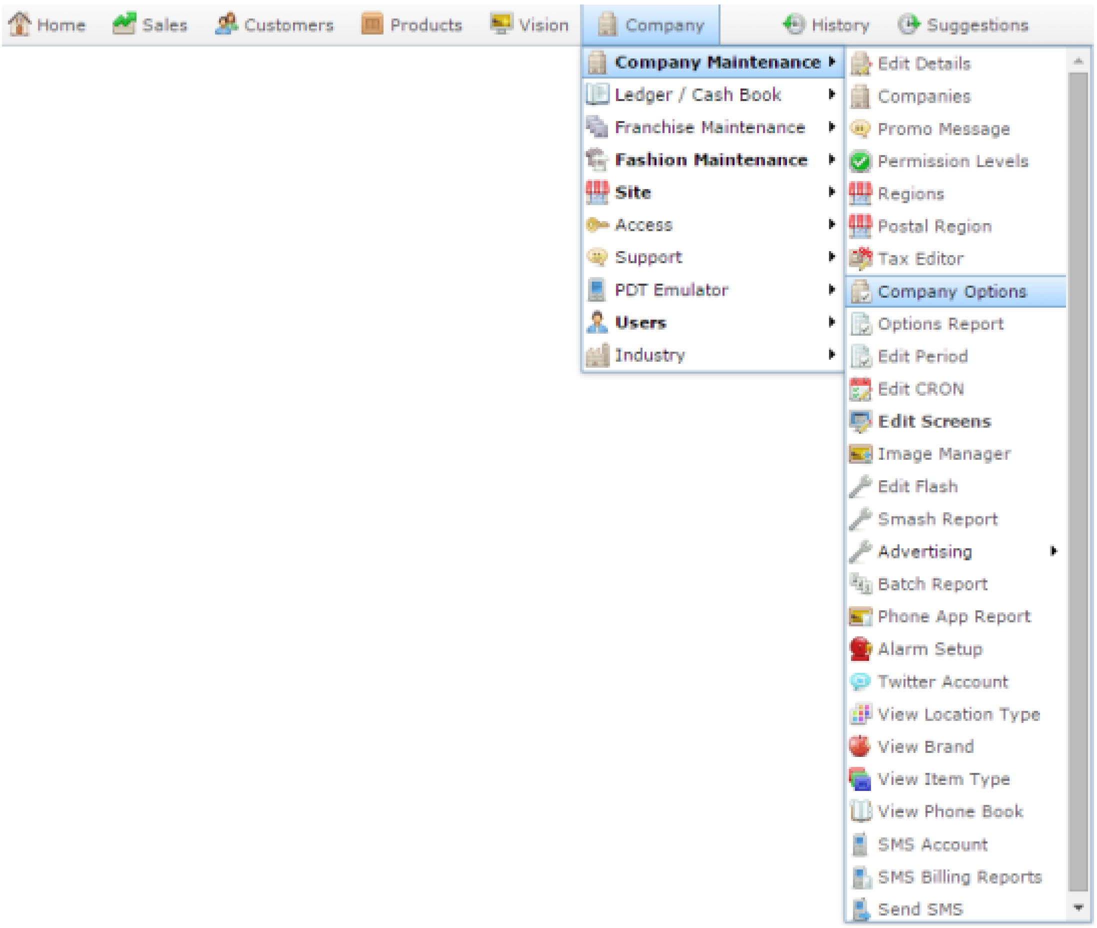
Use the Company Options - Price Matrix section to configure item and supplier cost-to-sell price matrices for your company.

## Opening the Company Options - Price Matrix section

To open the Company Options - Price Matrix section:

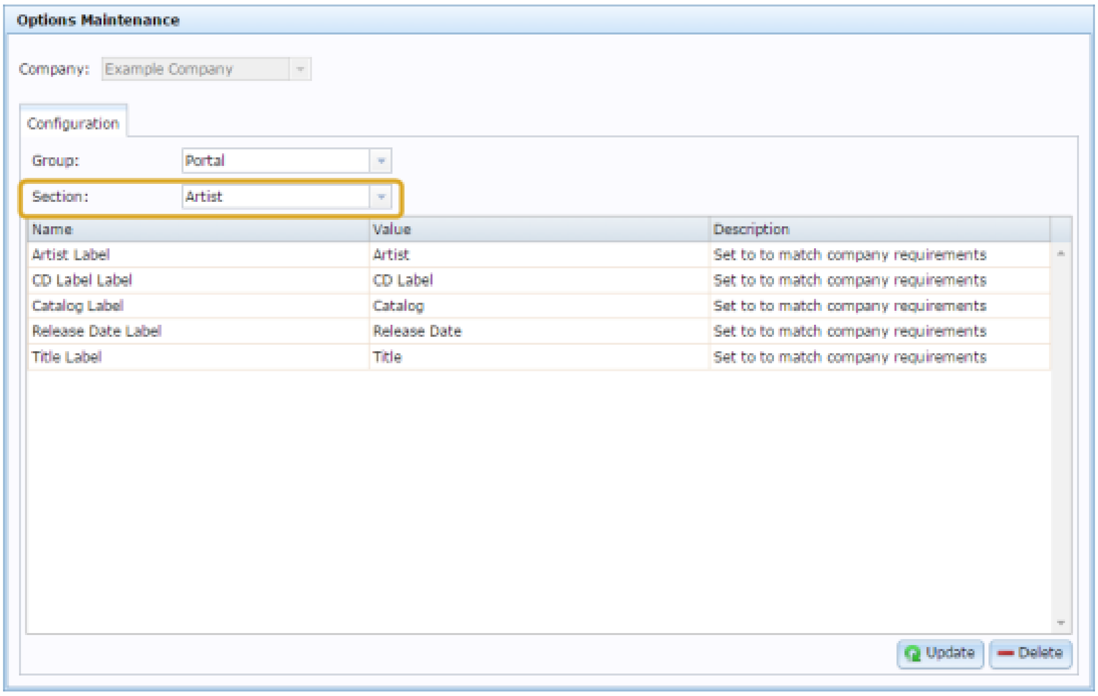
1. Press 

.
2. Press Company Maintenance > Company Options.



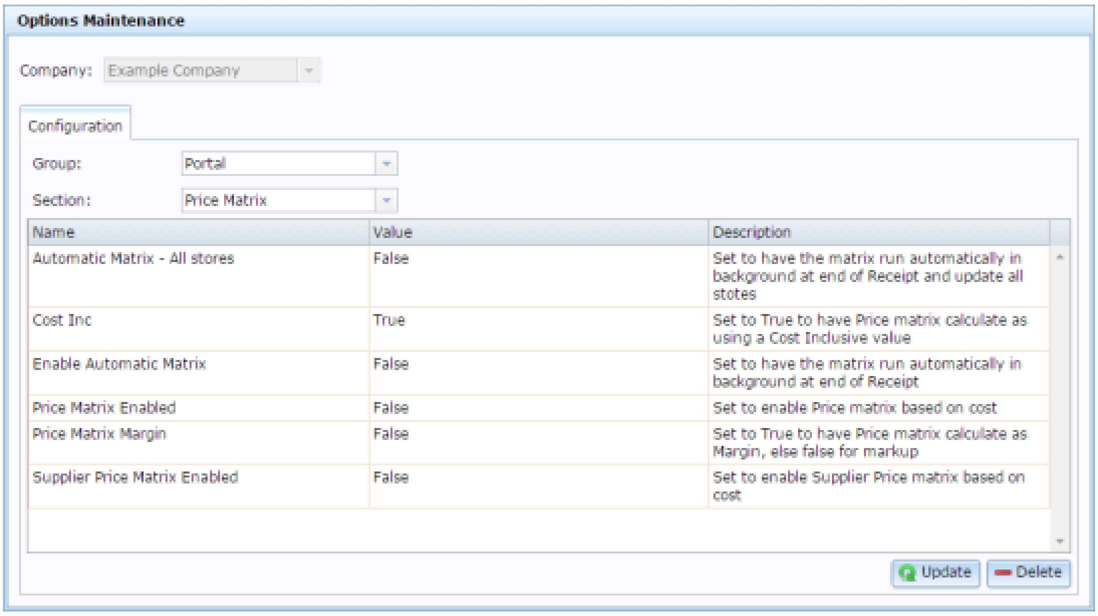

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.

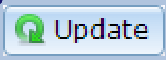



4. Select Price Matrix from the Section drop-down list.

   The Price Matrix section is displayed.



## Company Options - Price Matrix section key fields and buttons

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

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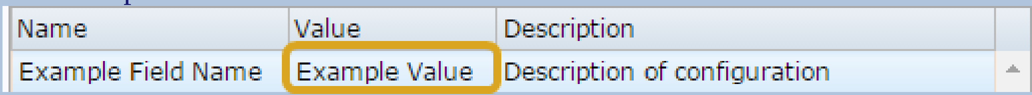



| Configuration | Description |
|---|---|
| **Automatic Matrix - All stores** | Type True for the Portal to update all site's price matrices after receipting stock. |
| **Cost Inc** | Type True to use a cost that includes GST or sales tax when calculating price matrices. |
| **Enable Automatic Matrix** | Type True for the Portal to update a creditor's price matrices after receipting stock from them. |
| **Price Matrix Enabled** | Type True to generate cost-to-sell-price matrices for items across all suppliers.<br>**Note:** Either the Price Matrix or the Supplier Price Matrix can be configured, but not both. |

| Configuration | Description |
|---|---|
| **Price Matrix Margin** | Type True to use a margin calculation when updating price matrices.<br><br>Type False to use a markup calculation. |
| **Supplier Price Matrix Enabled** | Type True to generate a cost-to-sell-price matrix for items per supplier.<br><br>**Note:** Either the Price Matrix or the Supplier Price Matrix can be configured, but not both. |

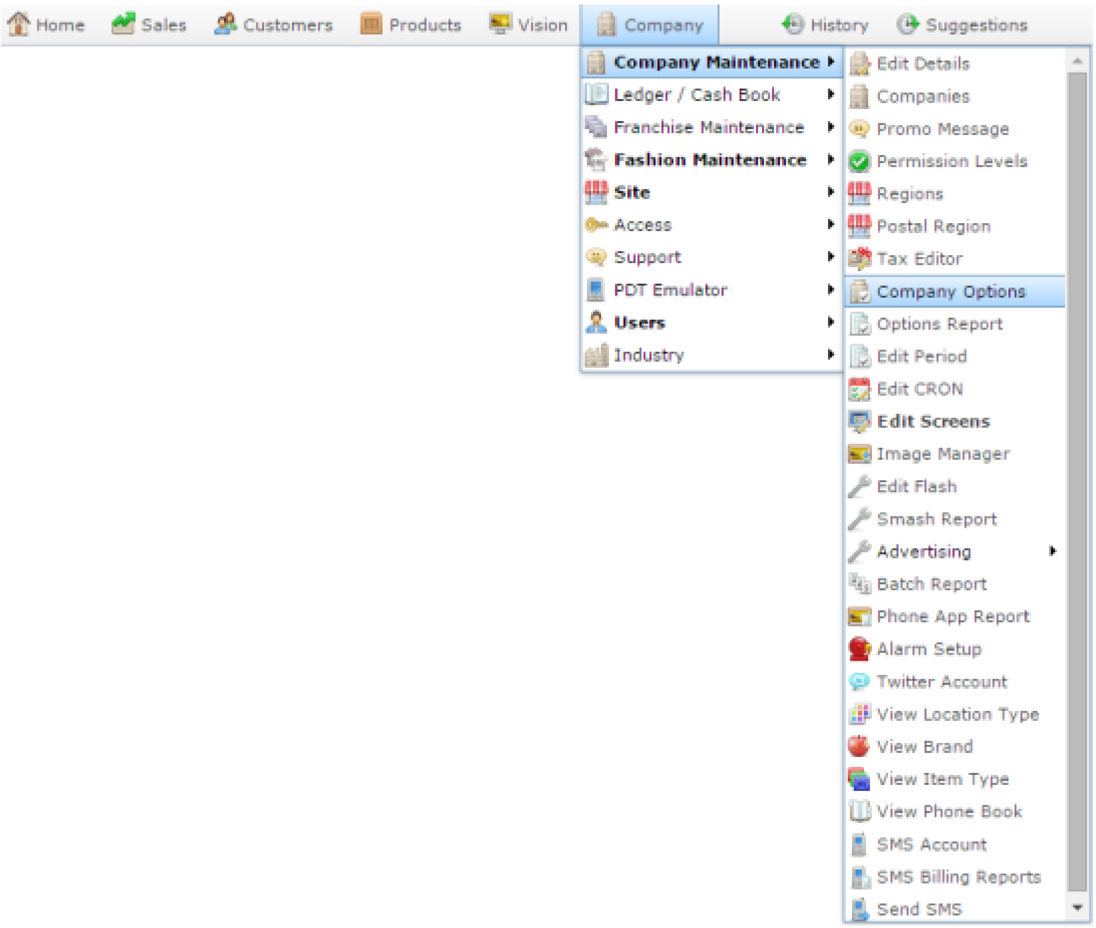
# Configuring promotions for your company

Use the Company Options - Promotions section to configure how your company manages promotions.

## Opening the Company Options - Promotions section

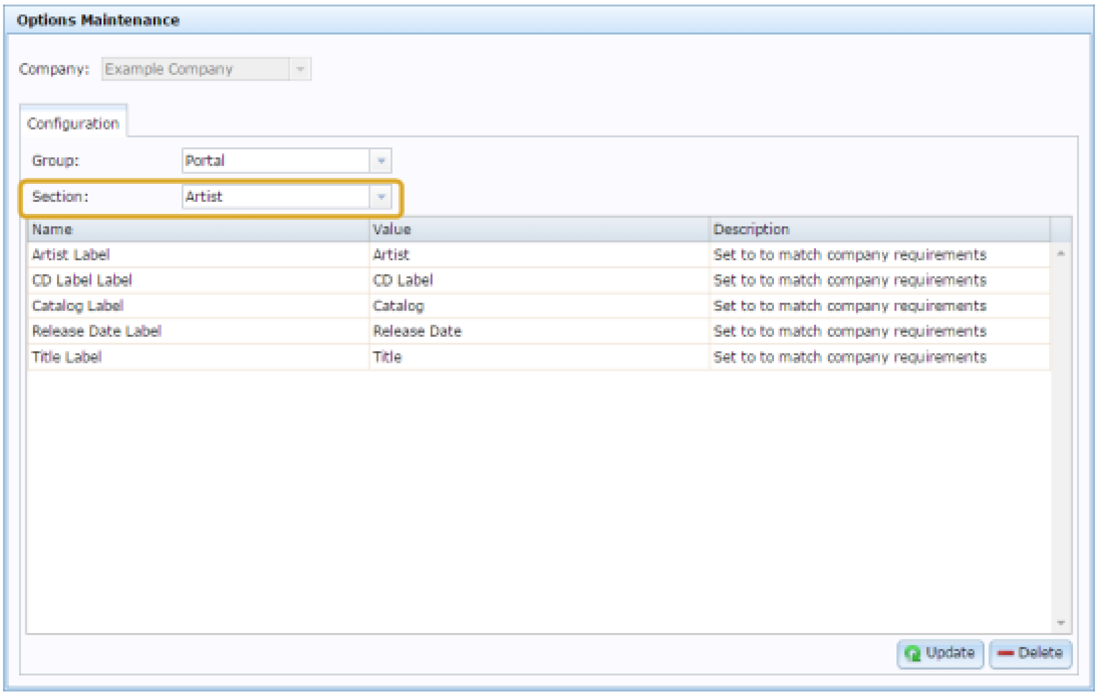
To open the Company Options - Promotions section:

1. Press .
2. Press Company Maintenance > Company Options.



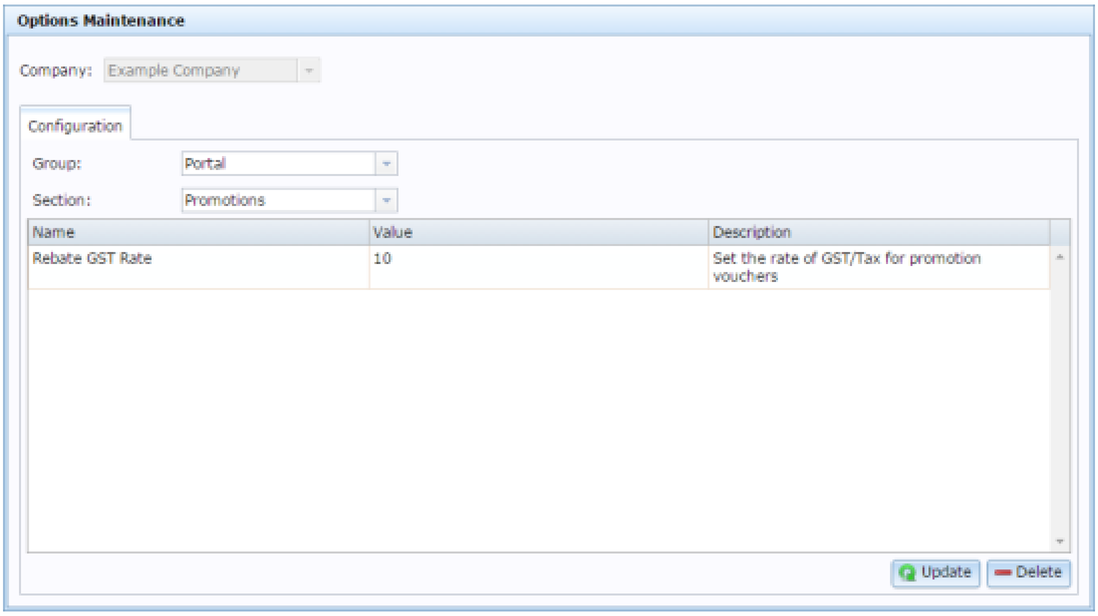
The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.



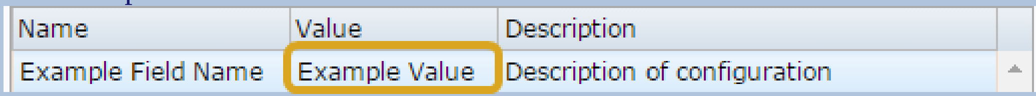

4. Select Promotions from the Section drop-down list.

   The Promotions section is displayed.



## Company Options - Promotions section key fields and buttons

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




| Configuration | Description |
|---|---|
| **Rebate GST Rate** | Type the GST or tax percentage for promotion vouchers.<br><br>For example, if the tax rate is 10%, type 10. |

# Configuring purchase orders for your company

Use the Company Options - Purchase Orders section to configure your company for creating and managing purchase orders of items.

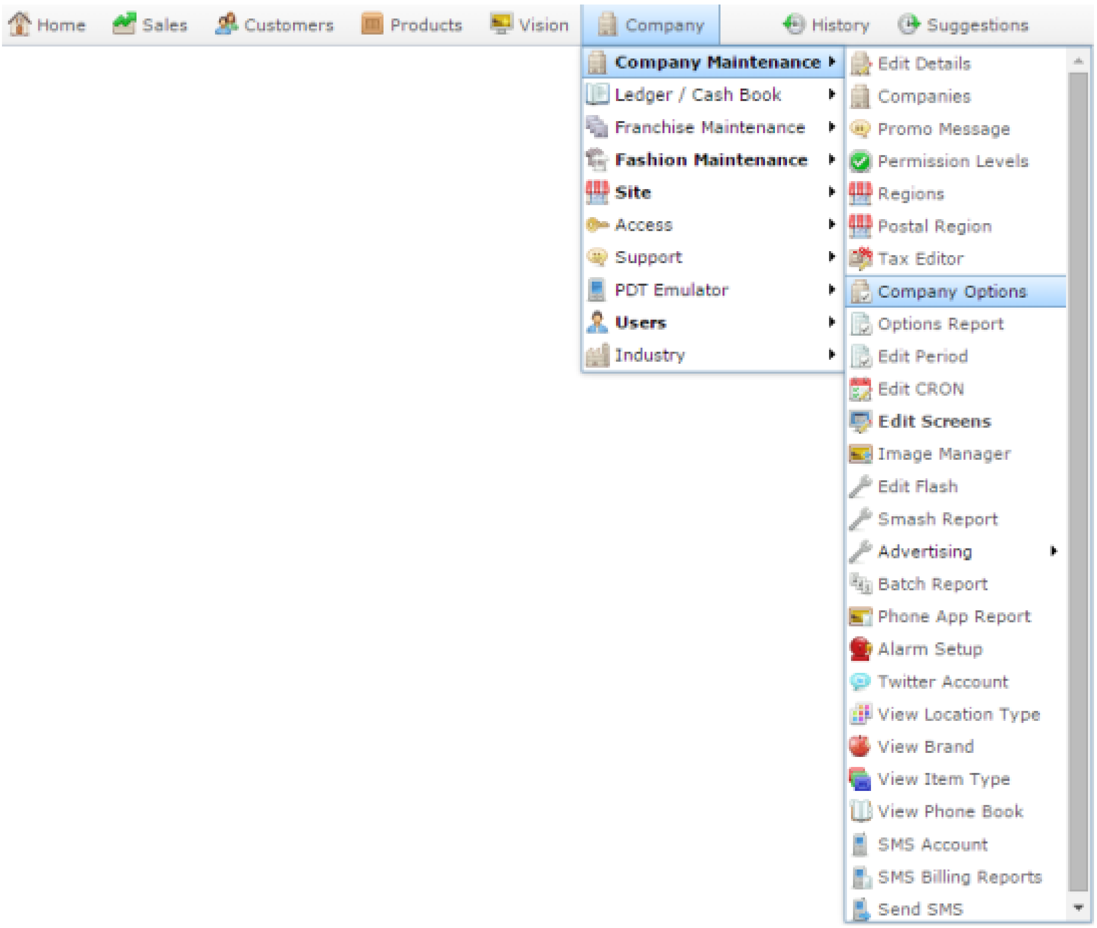
## Opening the Company Options - Purchase Orders section

To open the Company Options - Purchase Orders section:

1. Press 

.

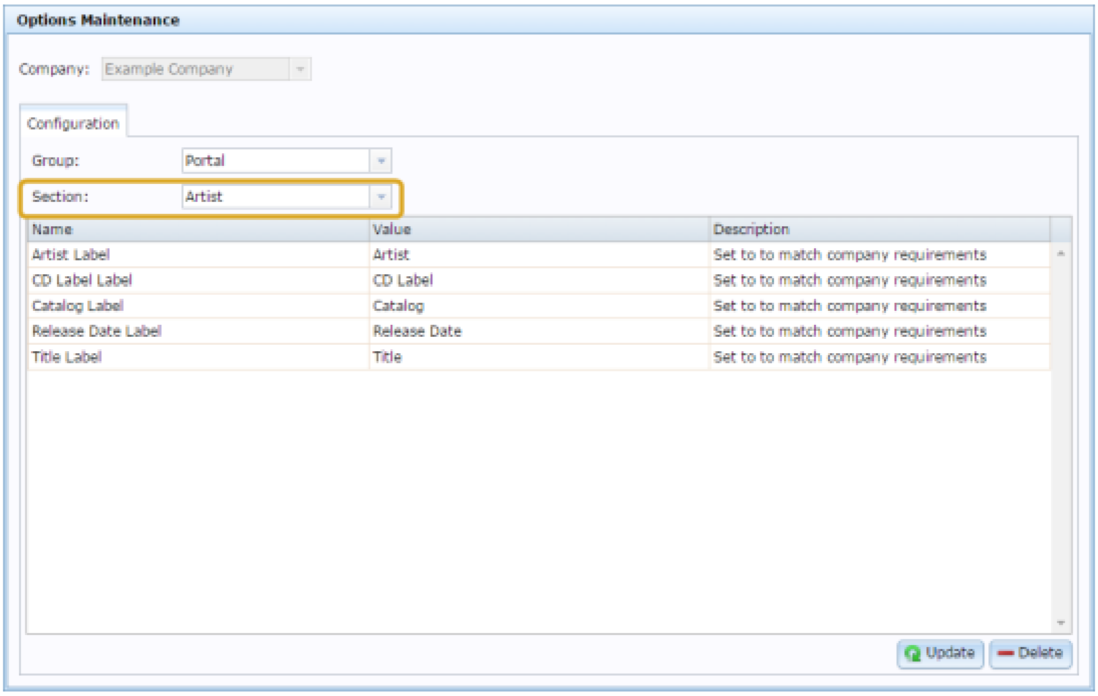
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

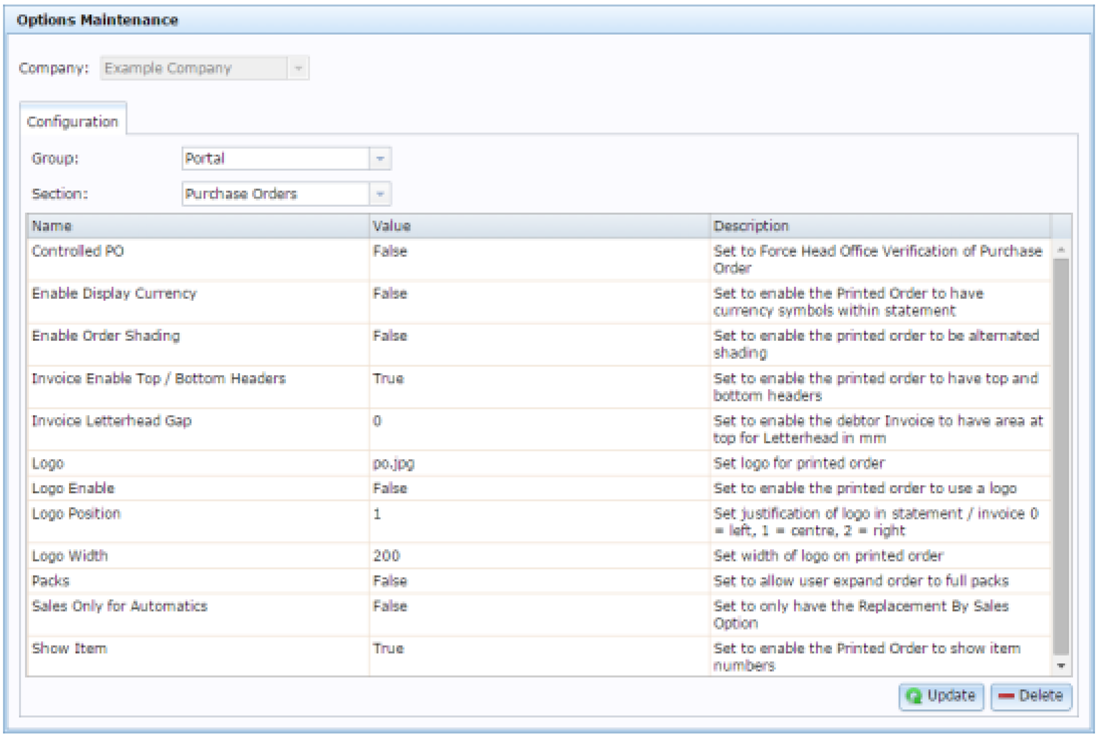
3. Open the Section drop-down list.

Company Maintenance screen

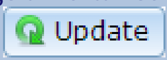



4. Press Purchase Orders from the Section drop-down list.

   The Purchase Orders section is displayed.



## Company Options - Purchase Orders section key fields and buttons

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

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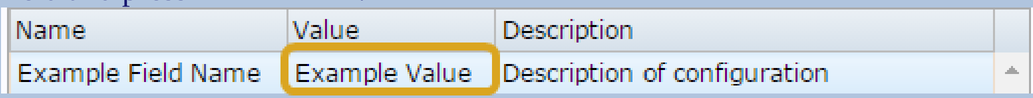



| Configuration | Description |
|---|---|
| **Controlled PO** | Type True to require purchase orders to be authorised before they can be finalised. |
| **Enable Display Currency** | Type True to display currency symbols on the purchase orders. |
| **Enable Order Shading** | Type True to shade every second row of the printed purchase order.<br><br>**Note:** When enabled, this option increases the amount of ink used when printing purchase orders. |
| **Invoice Enable Top / Bottom Headers** | Type True to use a header and footer on the printed purchase order. |

| Configuration | Description |
|---|---|
| **Invoice Letterhead Gap** | Type the number of millimetres to leave as a gap at the top of the page for a letterhead.<br><br>For example, if your letterhead is 1.5 cm tall, and you want a 3 mm gap after it before the purchase order starts, type 18. |
| **Logo** | Type the name of the logo to print on the printed purchase order. |
| **Logo Enable** | Type True to use a logo on the printed purchase order. |
| **Logo Position** | Type the justification of the logo on the printed purchase order.<br><br>**0** left-justified.<br>**1** centered.<br>**2** right-justified. |
| **Logo Width** | Type the width of the logo in pixels. |

| Configuration | Description |
|---|---|
| **Packs** | Type True to automatically convert an order to full packs.<br><br>For example, if an item is supplied in packs of 6, a purchase order of 5 units is automatically expanded to 1 pack of 6 units.<br><br>This is different to ordering and receiving exclusively in packs, where the Portal multiplies all order quantities by the pack amount, rather than ordering individual units. See *Configuring packs for your site*. Also see *Inventory Management - Details tab*. |
| **Sales Only for Automatics** | Type True to have the Portal automatically manage procurement on a sell-on-order-one basis. |
| **Show Item** | Type True to display item codes on the printed purchase order. |

Company Maintenance
screen

# Configuring quotes for your company

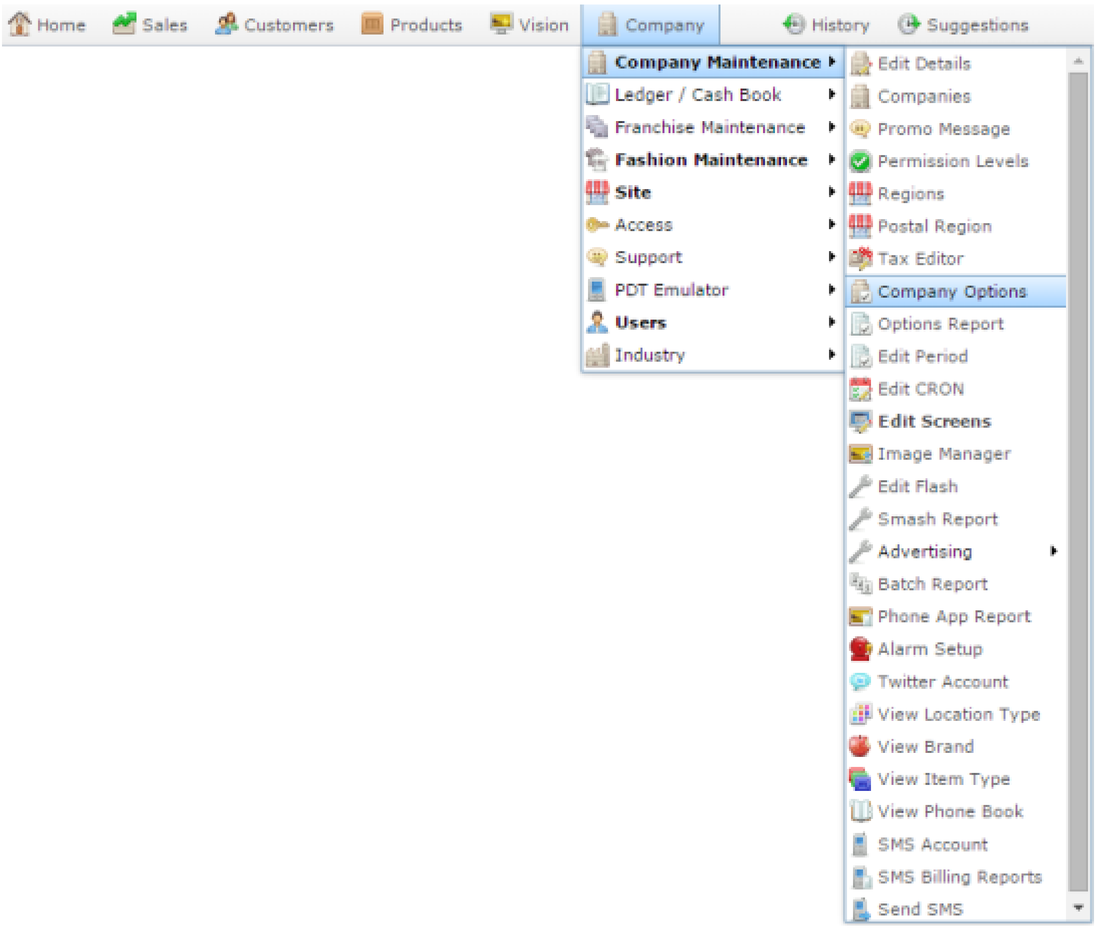
Use the Company Options - Quotes section to configure your company for providing quotes.

## Opening the Company Options - Quotes section

To open the Company Options - Quotes section:

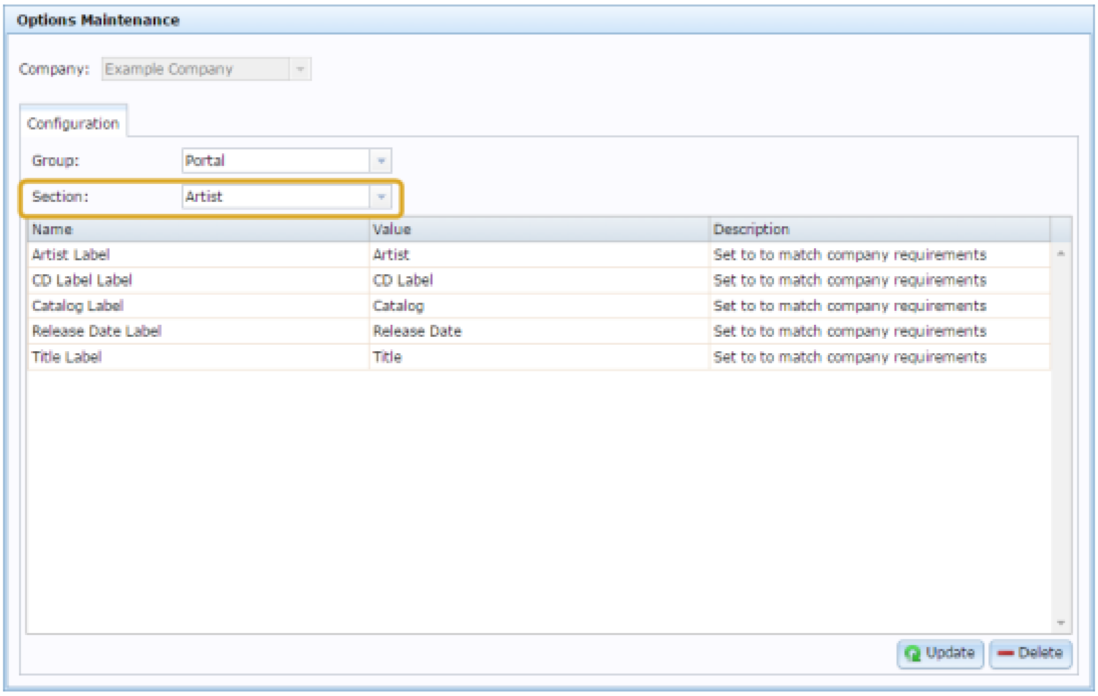
1. Press 

.
2. Press Company Maintenance > Company Options.



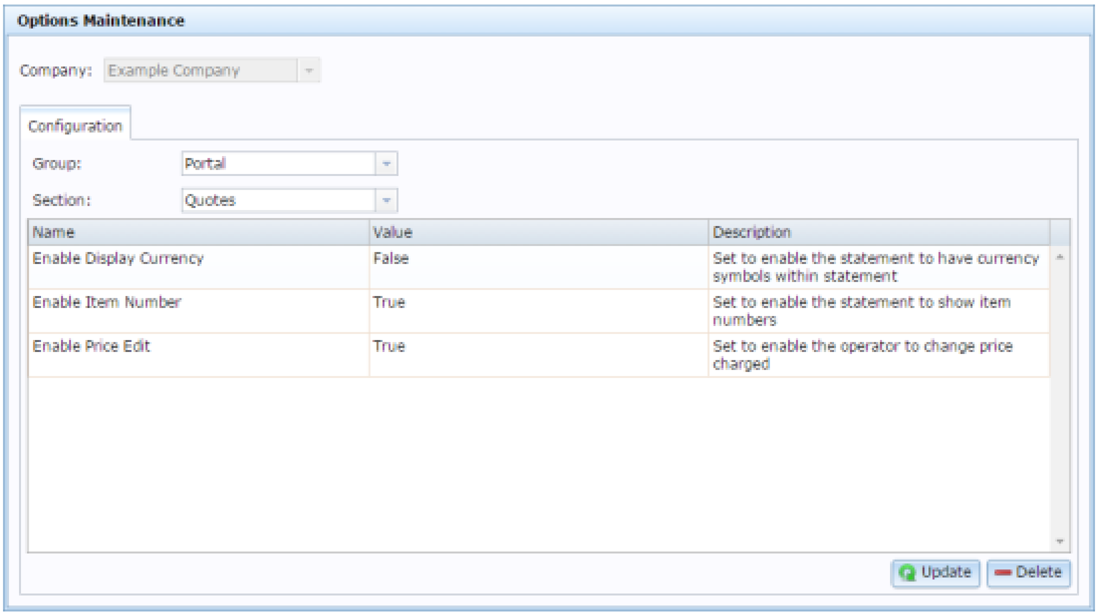

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.



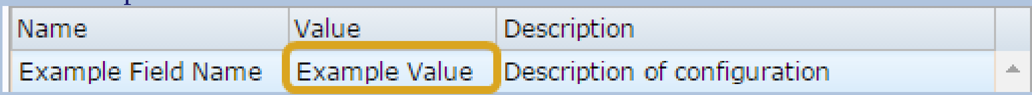

4. Select Quotes from the Section drop-down list.

   The Quotes section is displayed.



## Company Options - Quotes section key fields and buttons

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




| Configuration | Description |
|---|---|
| **Enable Display Currency** | Type True to display currency symbols in your quote documents. |
| **Enable Item Number** | Type True to display item numbers in your quote documents. |
| **Enable Price Edit** | Type True to allow the Portal user to change the item price when creating a quote. |

# Configuring requisition options for your company

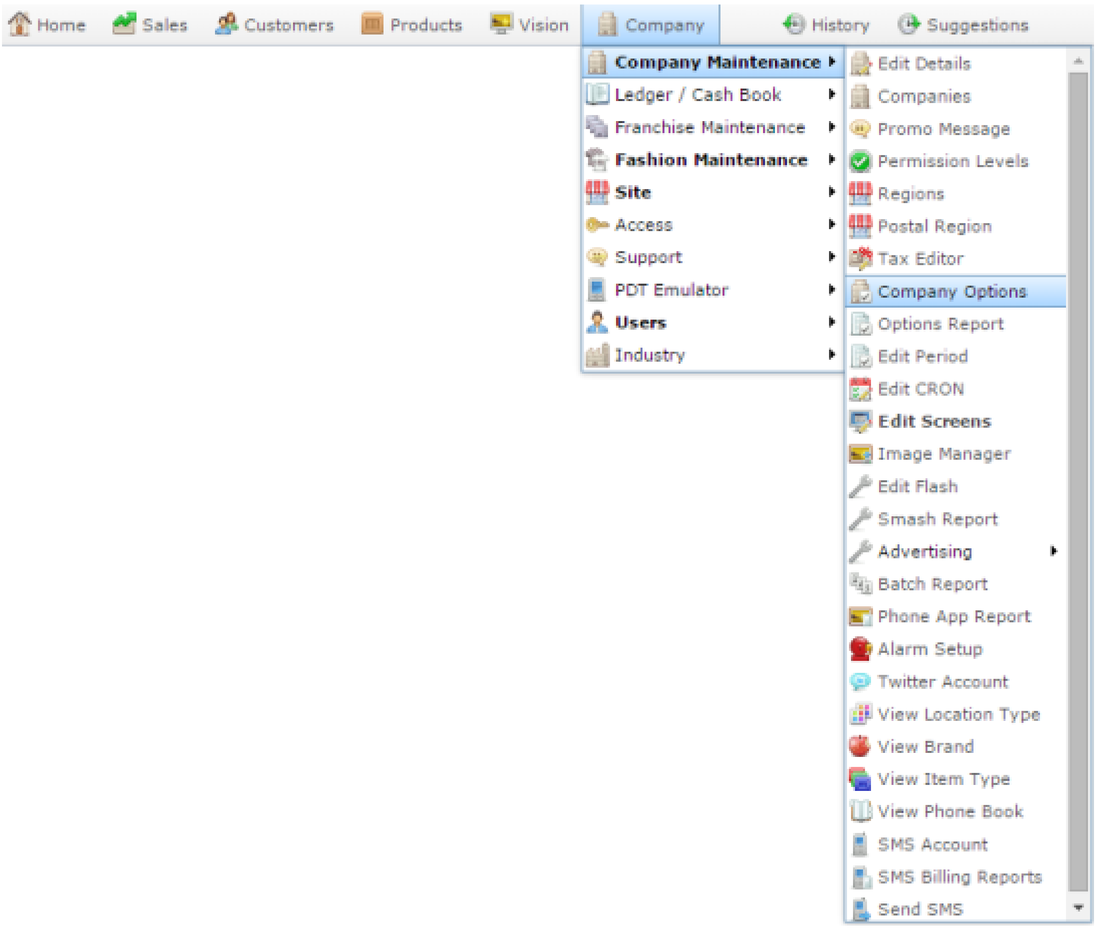
Use the Company Options - Requisitions section to configure your company for

## Opening the Company Options - Requisitions section

To open the Company Options - Requisitions section:

1. Press 

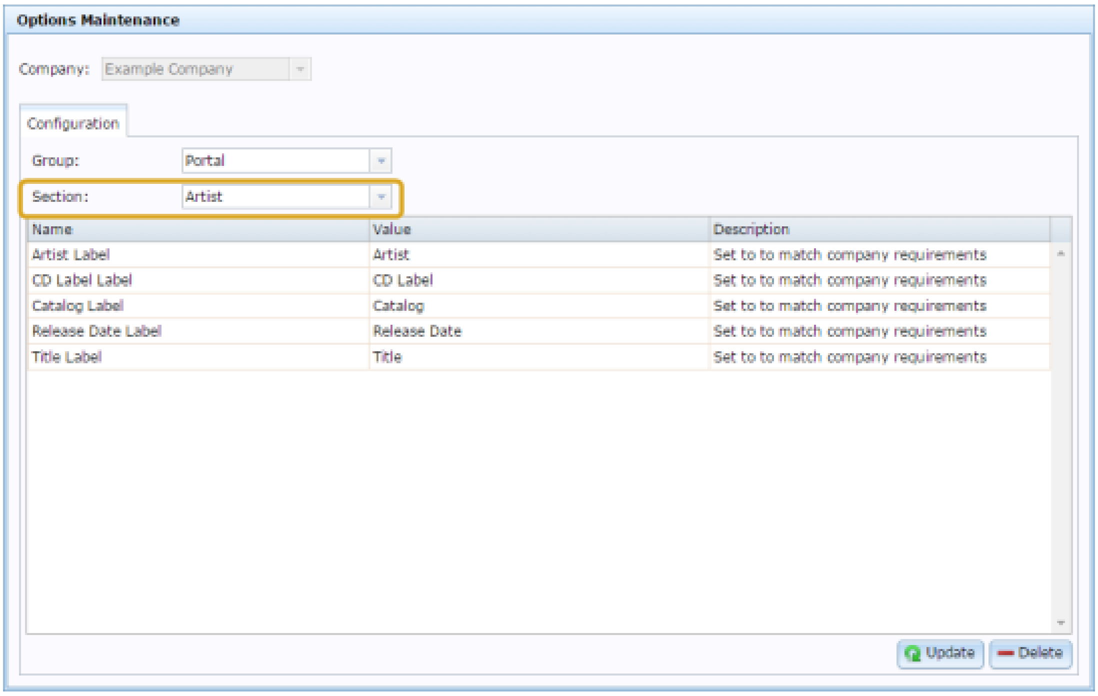
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

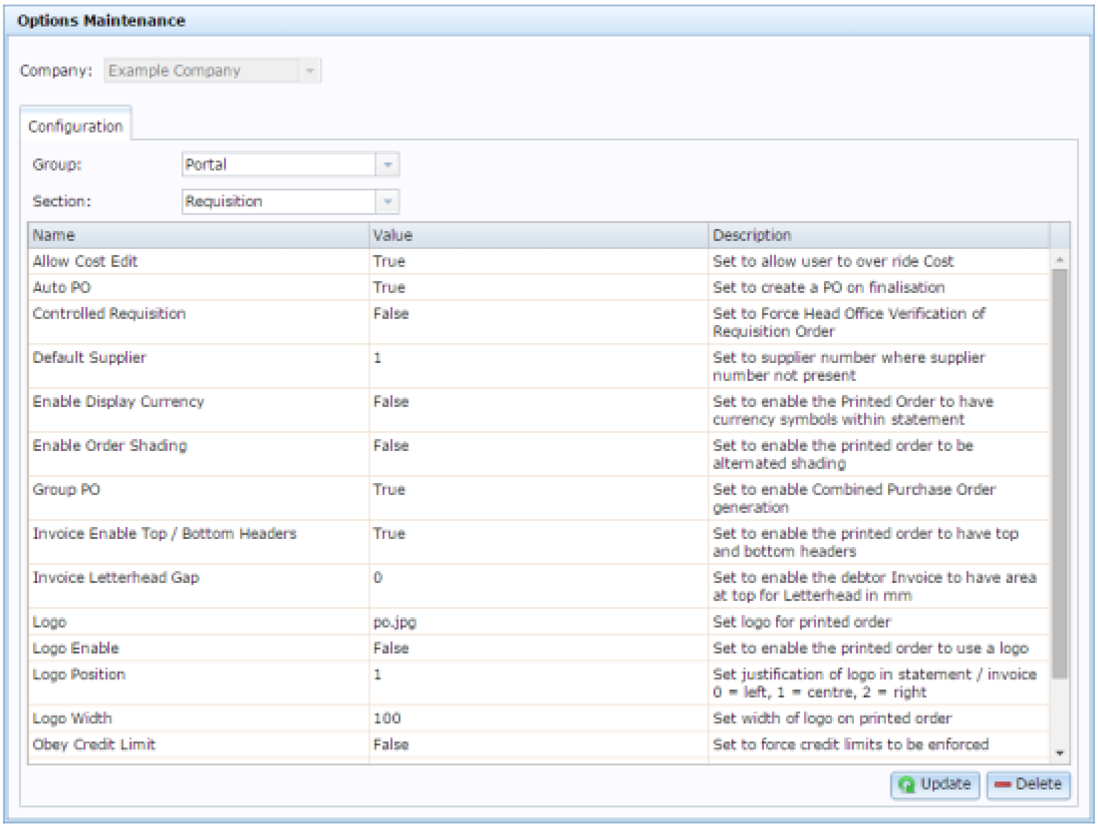
3. Open the Section drop-down list.

Company Maintenance screen

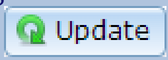



4. Select Requisitions from the Section drop-down list.

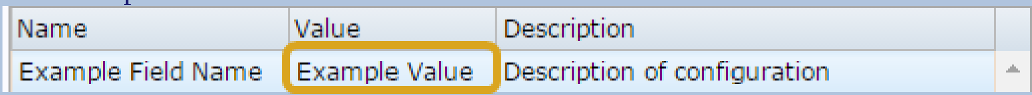
   The Requisitions section is displayed.



## Company Options - Requisitions section key fields and buttons

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

.




| Configuration | Description |
|---|---|
| **Allow Cost Edit** | Type True to allow operators to override an item cost when creating requisitions. |
| **Auto PO** | Type True to automatically convert finalised requisitions into purchase orders. |
| **Controlled Requisition** | Type True to require requisitions to be authorised by head office before they can be finalised. |
| **Default Supplier** | Type the supplier number of the supplier to use as the default supplier. |
| **Enable Display Currency** | Type True to display currency symbols on the printed requisition. |
| **Enable Order Shading** | Type True to shade every alternate row of the printed requisition for easier reading. |

| Configuration | Description |
|---|---|
| **Group PO** | Type True to combine requisitions from multiple sites into a single group purchase order. |
| **Invoice Enable Top / Bottom Headers** | Type True to display headers and footers on the printed requisitions. |
| **Invoice Letterhead Gap** | Type the number of millimetres to leave as a gap at the top of the page for a letterhead.<br><br>For example, if your letterhead is 1.5 cm tall, and you want a 3 mm gap after it before the purchase order starts, type 18. |
| **Logo** | Type the name of the logo to print on the printed requisition. |
| **Logo Enable** | Type True to use a logo on the printed requisition. |
| **Logo Position** | Type the justification of the logo on the printed requisition.<br><br>**0** left-justified.<br>**1** centered.<br>**2** right-justified. |

| Configuration | Description |
|---|---|
| **Obey Credit Limit** | This configuration is no longer in use. |
| **Obey Max** | Type True to prevent operators from ordering units of an item that would exceed the item's maximum stock-on-hand.<br><br>For example, if the stock-on-hand of an item is 15 units and the maximum is 50 units, an operator would not be permitted to order more than 35 units. |
| **Show Item** | Type True to display the item numbers in the requisitions screen. |

Company Maintenance
screen

# Configuring stock adjustments for your company

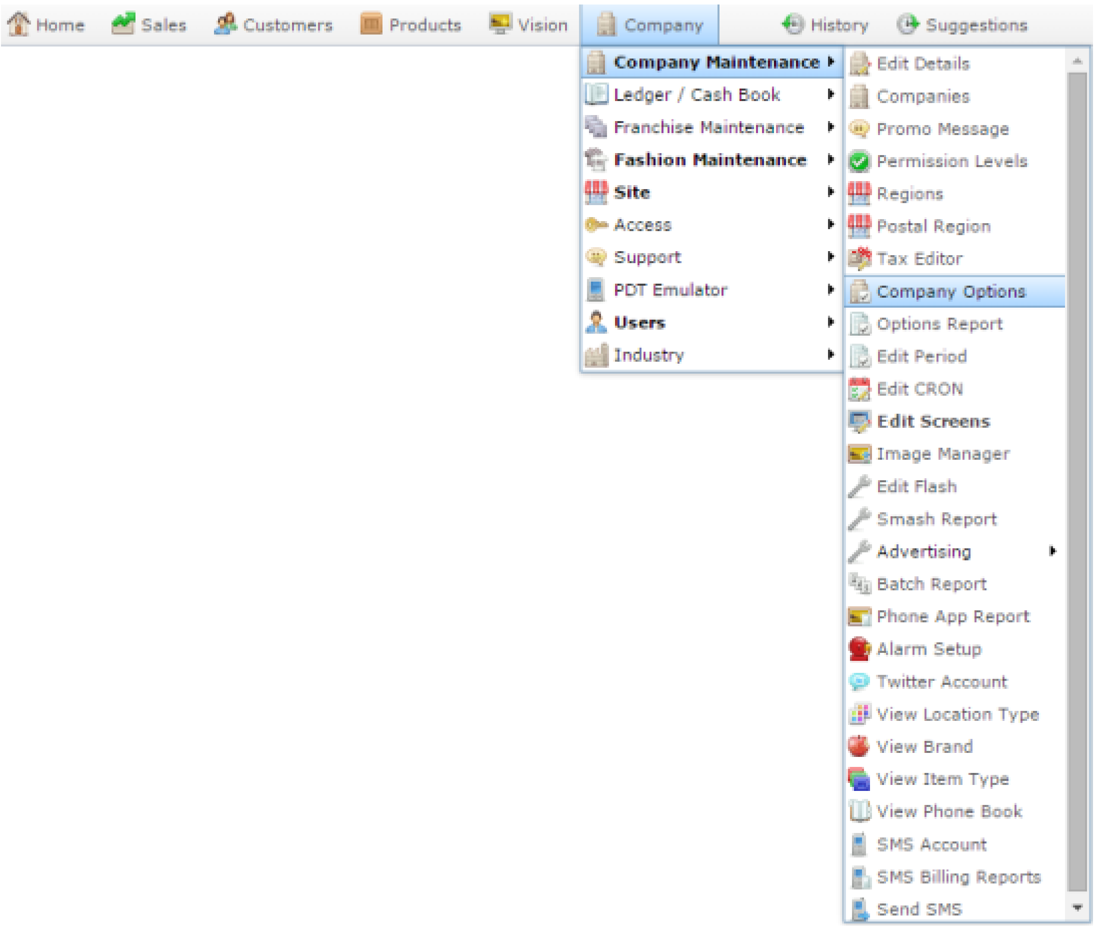
Use the Company Options - Stock Adjustments section to configure your company for using stock adjustments to increase or decrease your stock due to write-offs or found-stock.

## Opening the Company Options - Stock Adjustments section

To open the Company Options - Stock Adjustments section:

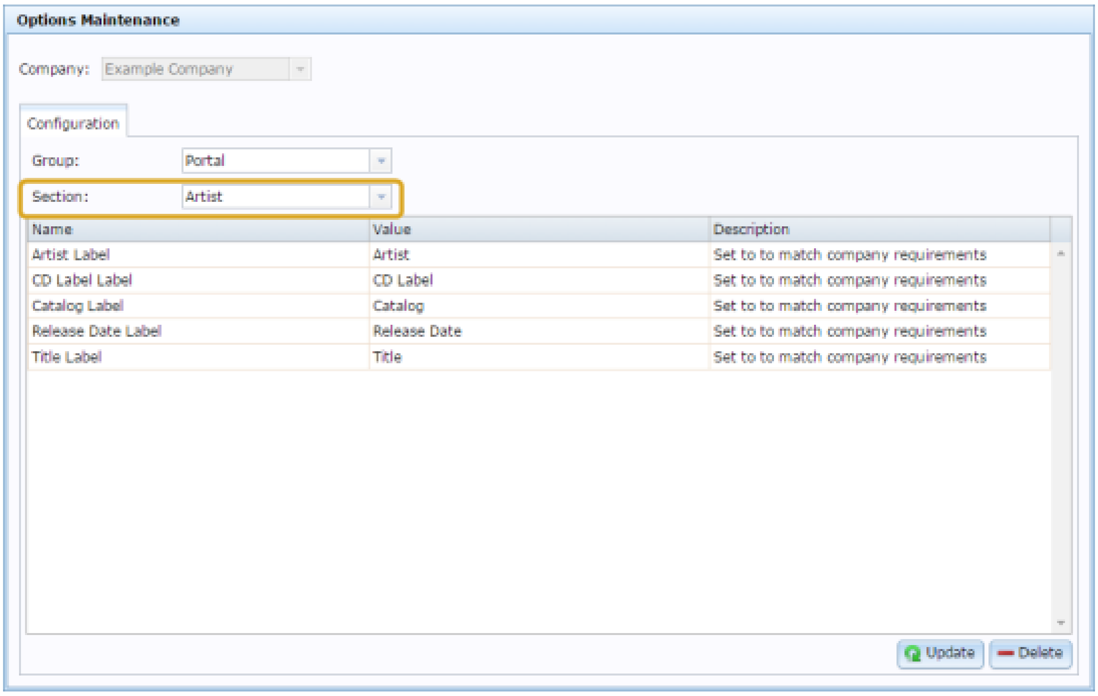
1. Press 

.
2. Press Company Maintenance > Company Options.



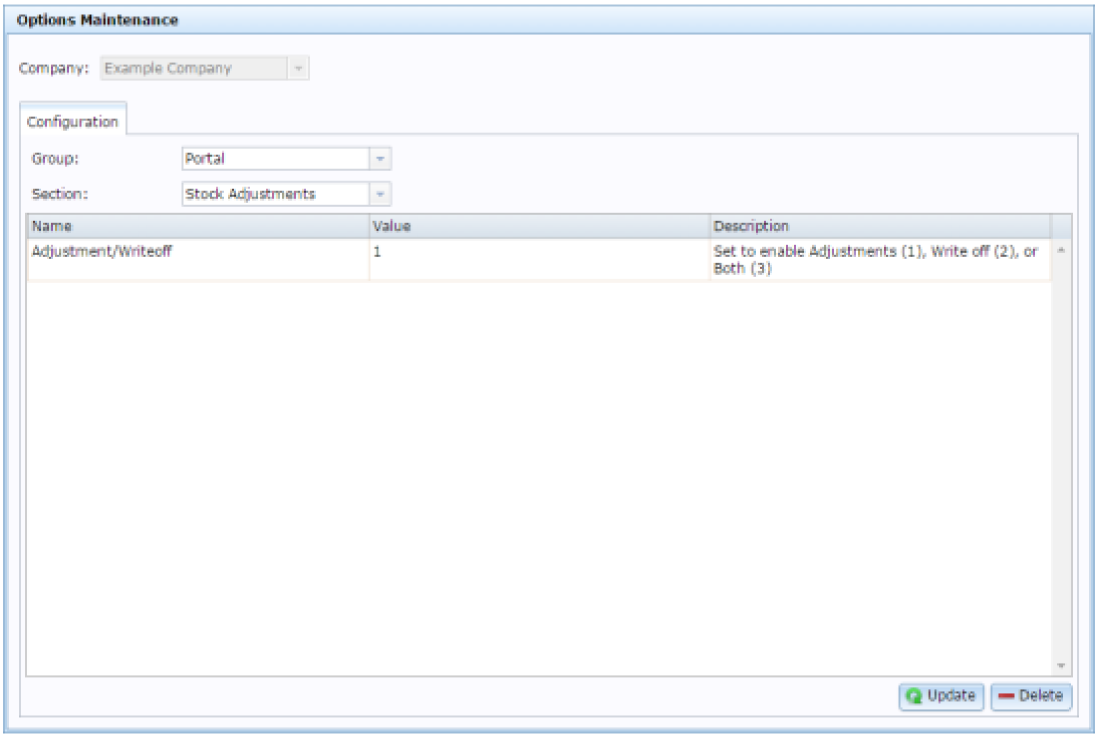

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.

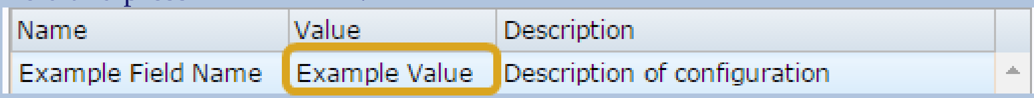



4. Select Stock Adjustments from the Section drop-down list.

   The Stock Adjustments section is displayed.



## Company Options - Stock Adjustments section key fields and buttons

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

| Configuration | Description |
| --- | --- |
| **Adjustment/Writeoff** | Type the number corresponding to how you want stock adjustments to function.<br><br>**1** Enable the Adjustments screen, which can be used to increase or decrease stock levels.<br><br>**Note:** Positive adjustment units decrease stock, negative adjustment units increase stock.<br><br>**2** Enable the Write Off screen, which can only be used to reduce stock levels by writing off stock.<br><br>**3** Enable both the Adjustments screen and the Write Off screen. |

# Configuring stock receipts for your company

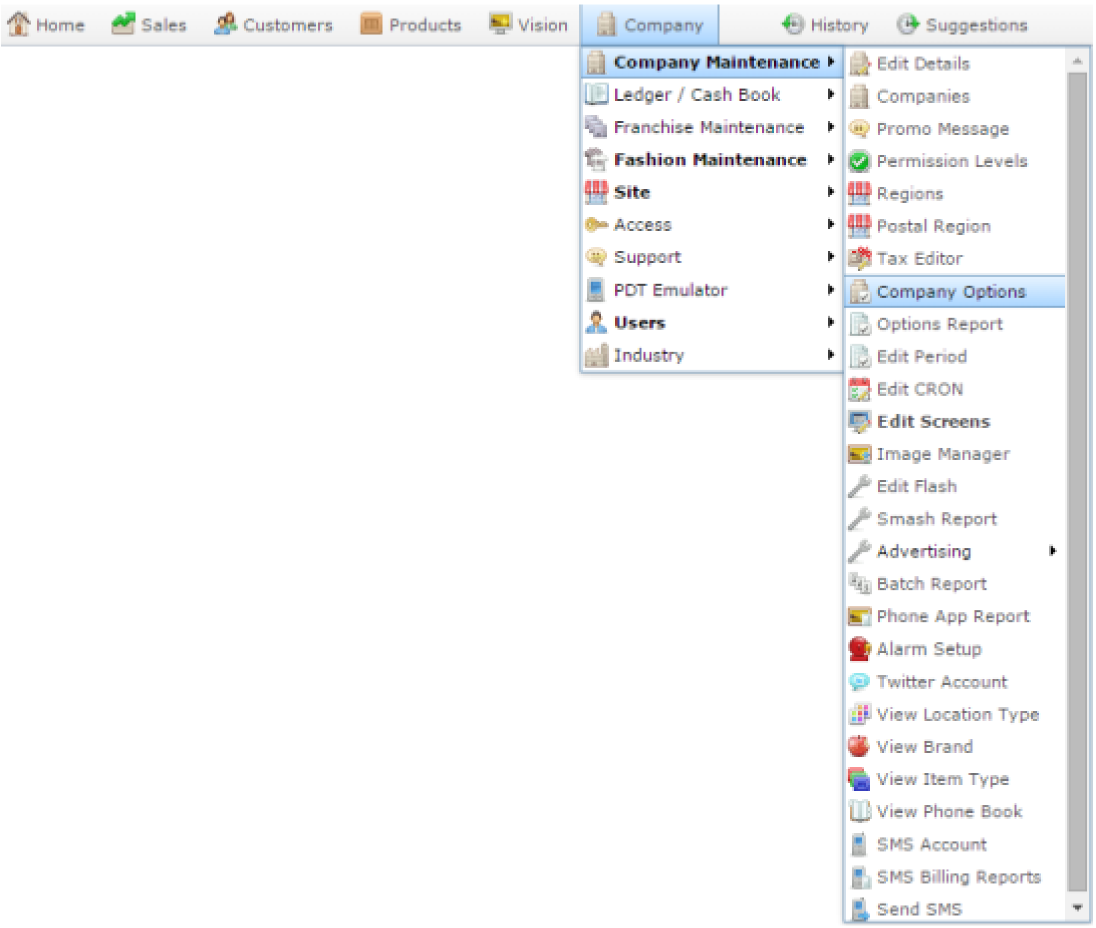
Use the Company Options - Stock Receipts section to configure your company for receipting stock from suppliers.

## Opening the Company Options - Stock Receipts section

To open the Company Options - Stock Receipts section:

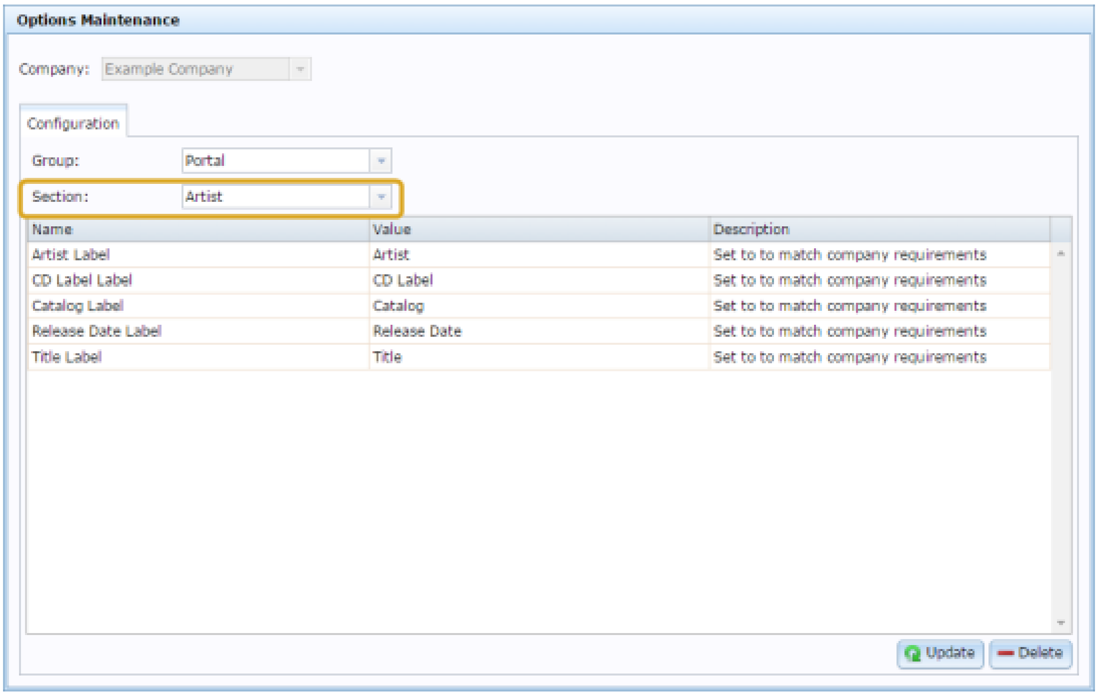
1. Press 

.
2. Press Company Maintenance > Company Options.



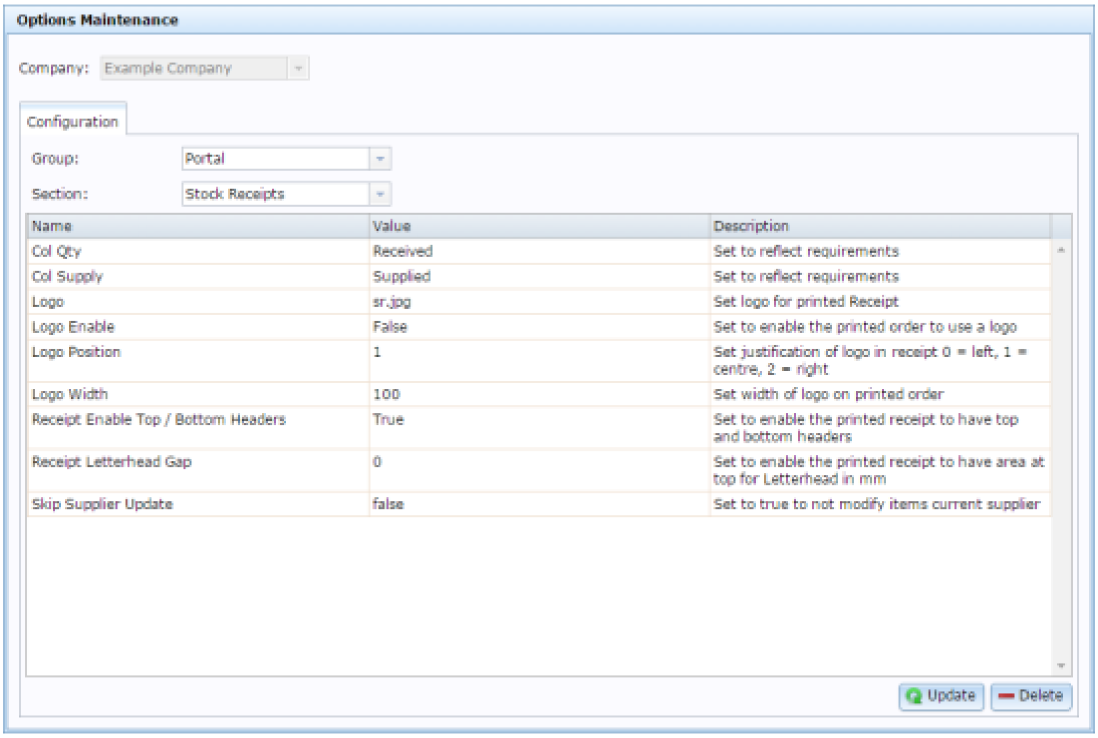

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.




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

   The Stock Receipts section is displayed.



# Company Options - Stock Receipts section key fields and buttons

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

| Name | Value | Description |
|---|---|---|
| Example Field Name | Example Value | Description of configuration |

| Configuration | Description |
|---|---|
| **Col Qty** | Type the label you want to display for the stock receipts column that records how many units of stock you received. |
| **Col Supply** | Type the label you want to display for the stock receipts column that displays how many units the supplier sent. |
| **Logo** | Type the name of the logo to print on the printed stock receipt. |
| **Logo Enable** | Type True to use a logo on the printed stock receipt. |

| Configuration | Description |
| --- | --- |
| **Logo Position** | Type the justification of the logo on the printed stock receipt.<br>**0** left-justified.<br>**1** centered.<br>**2** right-justified. |
| **Logo Width** | Type the width of the logo in pixels. |
| **Receipt Enable Top / Bottom Headers** | Type True to use a header and footer on the printed stock receipt. |
| **Receipt Letterhead Gap** | Type the number of millimetres to leave as a gap at the top of the page for a letterhead.<br>For example, if your letterhead is 1.5 cm tall, and you want a 3 mm gap after it before the purchase order starts, type 18. |
| **Skip Supplier Update** | Type False to automatically set each item's current supplier to the supplier in the stock receipt.<br>Type True to not change the item's current supplier from stock receipts. |

# Configuring tax for your company

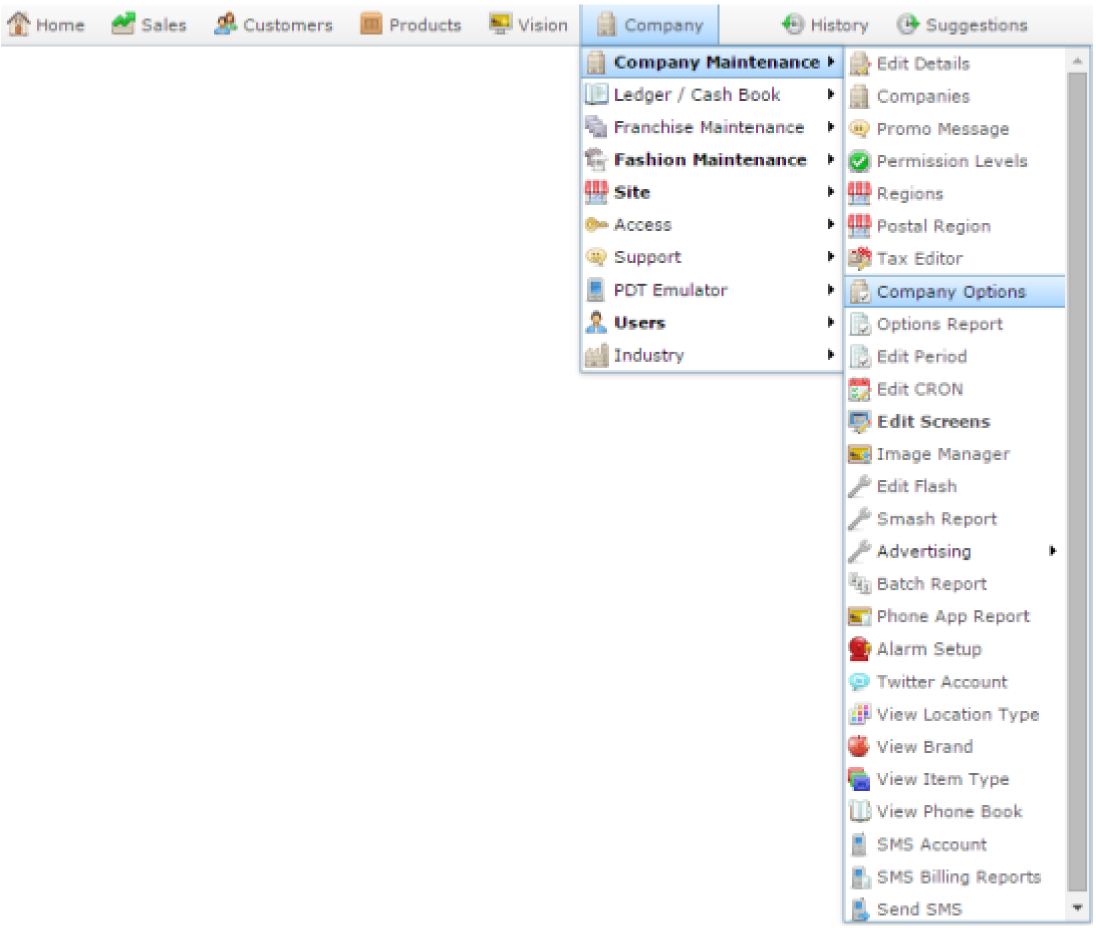
Use the Company Options - Tax section to configure the tax and accounting methods the Portal uses for your company.

## Opening the Company Options - Tax section

To open the Company Options - Tax section:

1. Press 

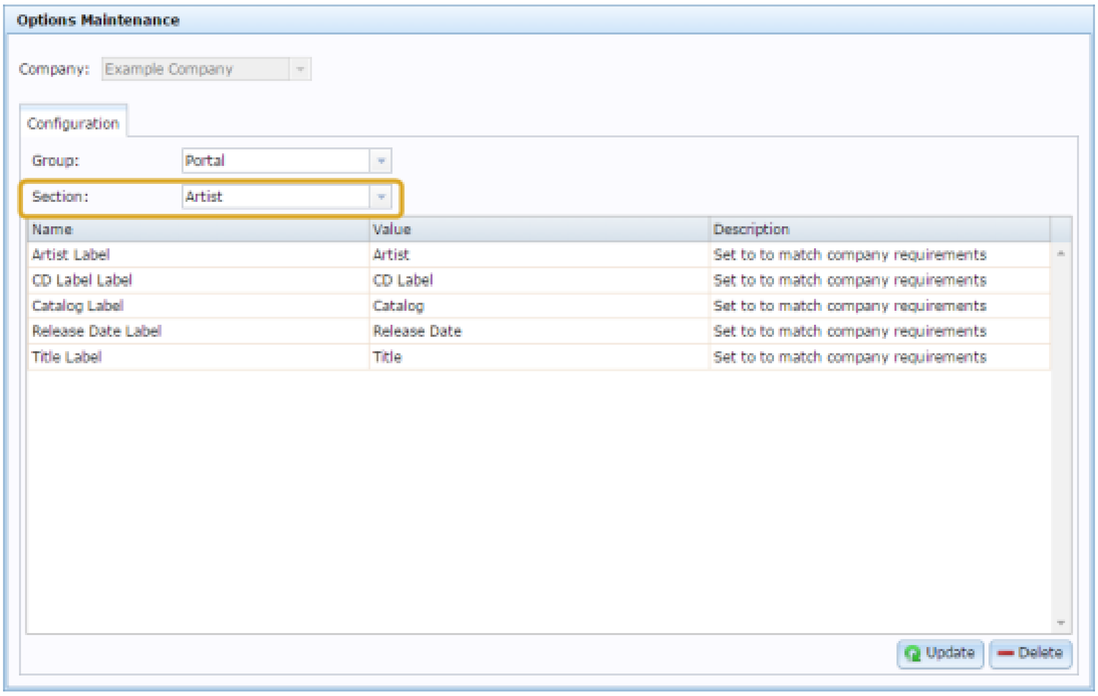
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

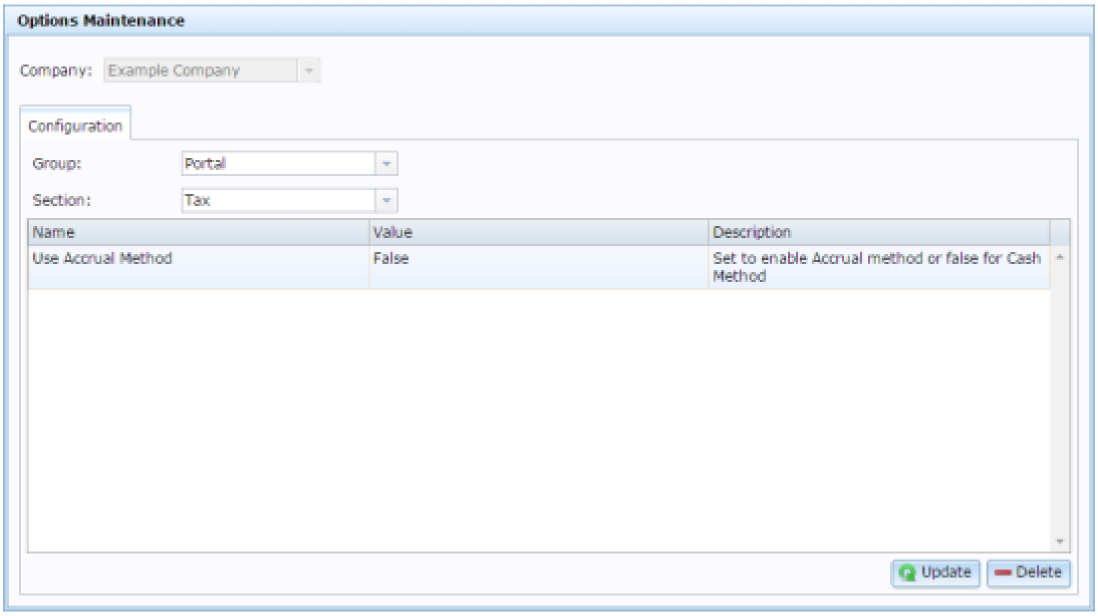
3. Open the Section drop-down list.

Company Maintenance screen

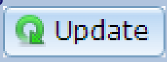



4. Select Tax from the Section drop-down list.

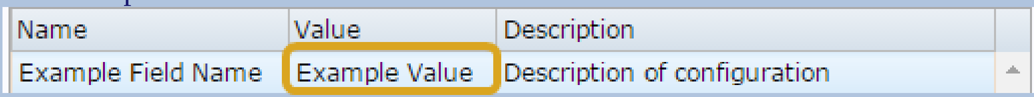
   The Tax section is displayed.



## Company Options - Tax section key fields and buttons

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





| Name | Value | Description |
|---|---|---|
| Example Field Name | Example Value | Description of configuration |

| Configuration | Description |
|---|---|
| **Use Accrual Method** | Type True to use Accrual Accounting in the Portal.<br><br>Type False to use Cash Accounting in the Portal. |

# Configuring tipping for your company

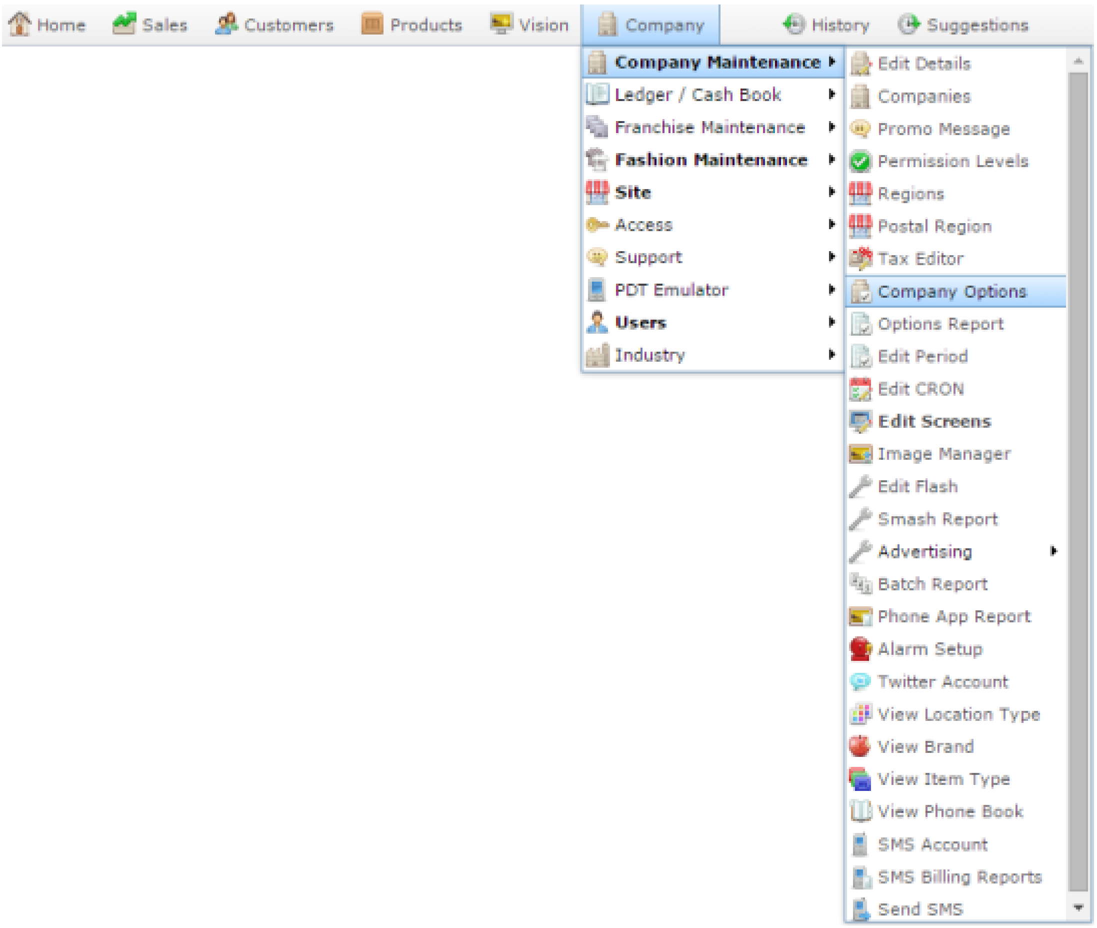
Use the Company Options - Tipping section to configure your company for football tipping.

## Opening the Company Options - Tipping section

To open the Company Options - Tipping section:

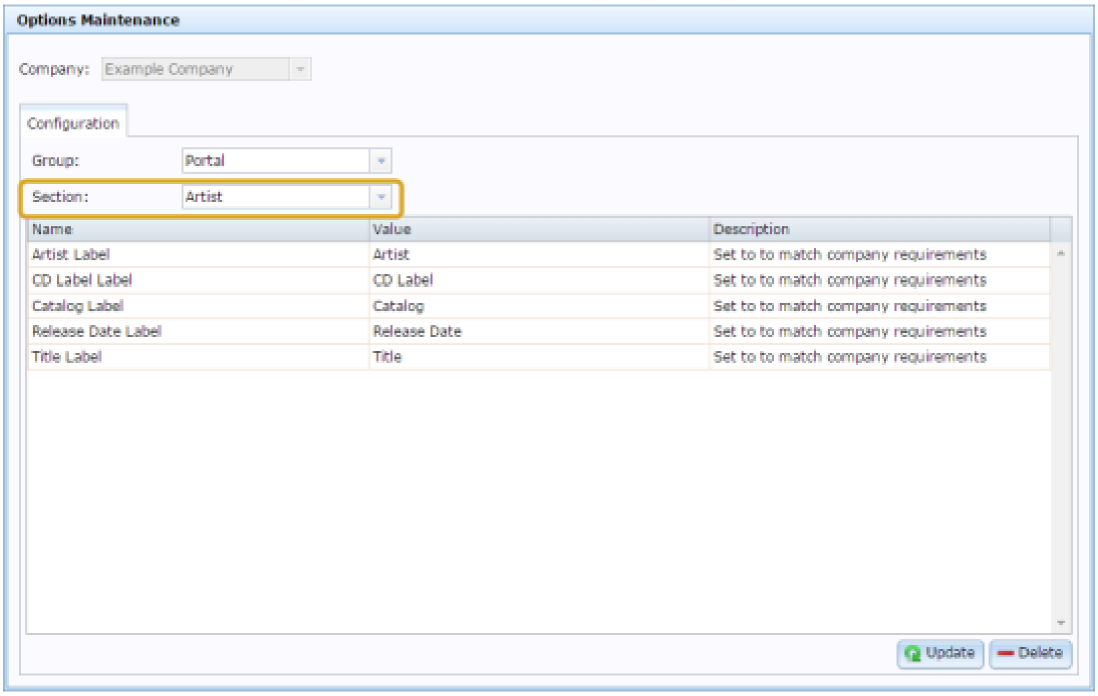
1. Press 

.
2. Press Company Maintenance > Company Options.



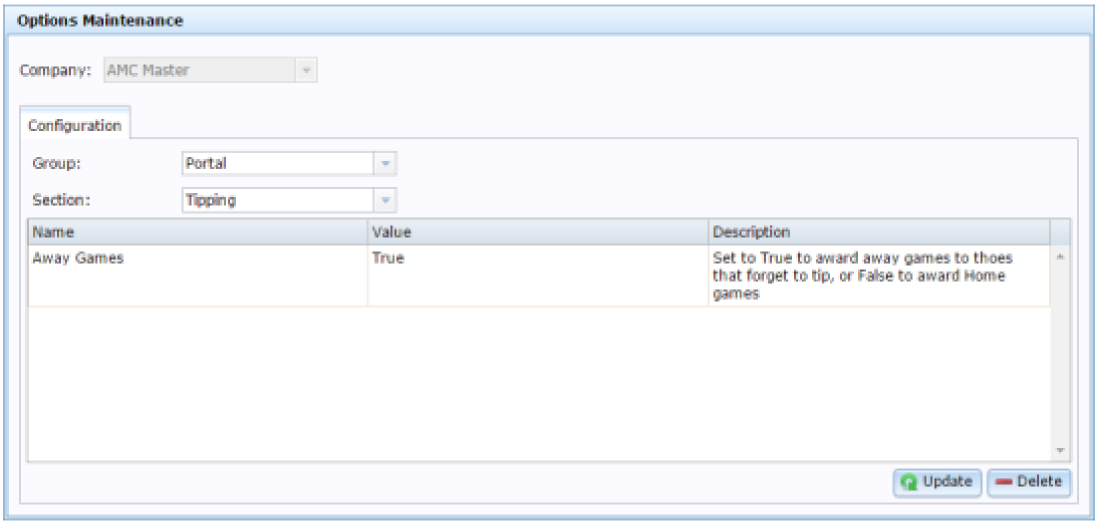

The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.




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

   The Tipping section is displayed.



## Company Options - Tipping section key fields and buttons

| Field | Description |
| --- | --- |
| **Away Games** | Select how default points are awarded to tippers who do not tip a game:<br>▪ Type True to award the points as if the tipper had tipped the Away team.<br>▪ Type False to award the points as if the tipper had tipped the Home team. |

# Configuring vision displays for your company

Use the Company Options - Vision section to configure how your terminals show vision displays across your company.

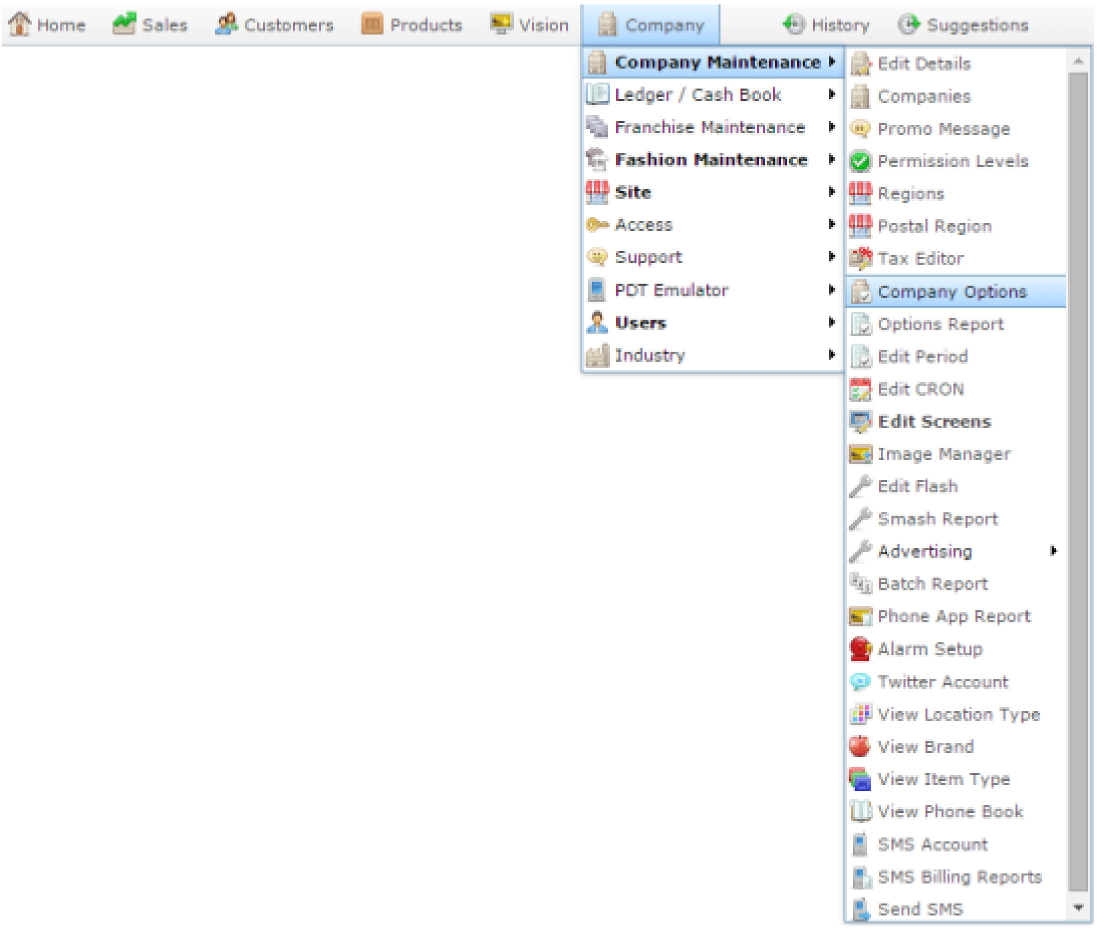
> **Note:** You can also add configurations per terminal. See *Configuring a terminal for vision displays*.

## Opening the Company Options - Vision section

To open the Company Options - Vision section:

1. Press 

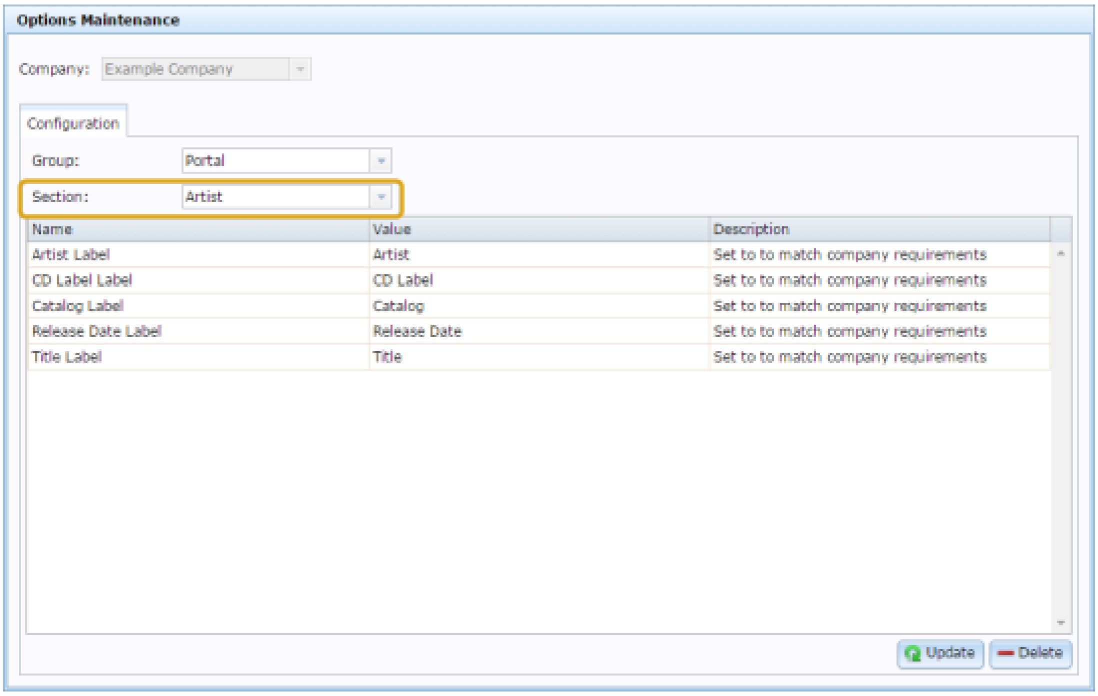
.
2. Press Company Maintenance > Company Options.




The Artist section of the Company Options screen is displayed.

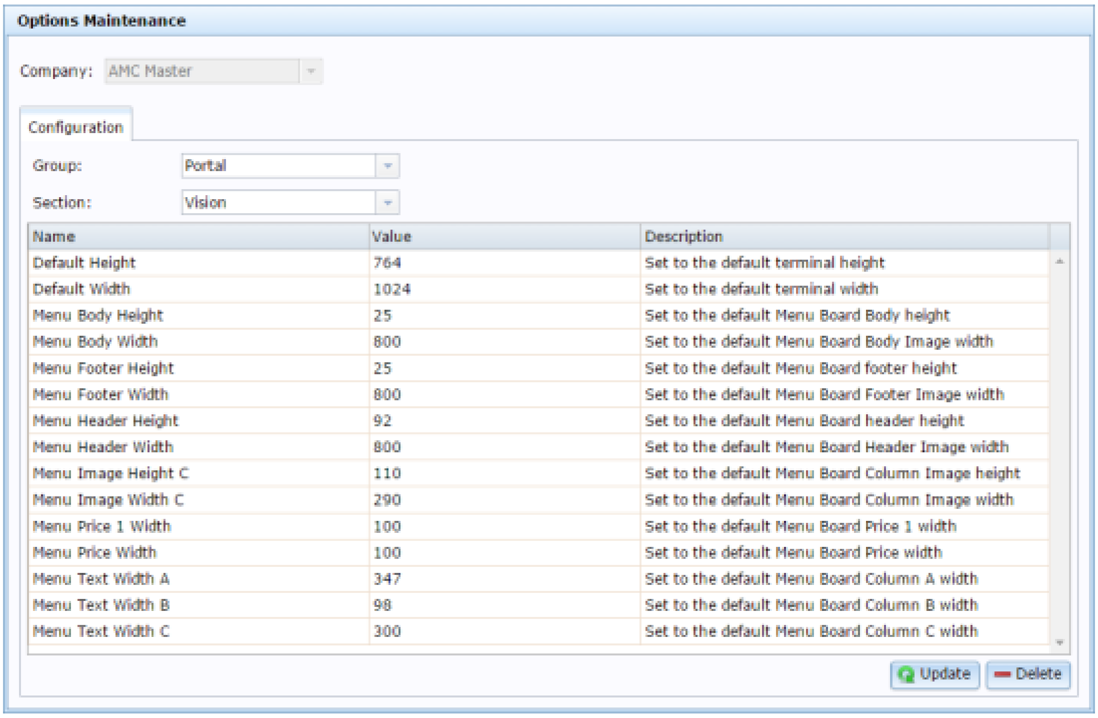
3. Open the Section drop-down list.

Company Maintenance screen




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

   The Vision section is displayed.



## Company Options - Vision section key fields and buttons

| Field | Description |
| --- | --- |
| **Default Height** | Type the number of pixels to use for the default height of a terminal. |
| **Default Width** | Type the number of pixels to use for the default width of a terminal. |
| **Menu Body Height** | Type the number of pixels to use for the default height of the menu board body. |
| **Menu Body Width** | Type the number of pixels to use for the default width of the menu board body. |
| **Menu Footer Height** | Type the number of pixels to use for the default height of the menu board footer. |
| **Menu Footer Width** | Type the number of pixels to use for the default width of the menu board footer. |
| **Menu Header Height** | Type the number of pixels to use for the default height of the menu board header. |

| Field | Description |
|---|---|
| **Menu Header Width** | Type the number of pixels to use for the default width of the menu board header. |
| **Menu Image Height C** | Type the number of pixels to use for the default height of the menu board column image. |
| **Menu Image Width C** | Type the number of pixels to use for the default width of the menu board image. |
| **Menu Price 1 Width** | Type the number of pixels to use for the default width of the menu board price 1. |
| **Menu Price Width** | Type the number of pixels to use for the default width of the menu board price. |
| **Menu Text Width A** | Type the number of pixels to use for the default width for the text of menu board column A. |
| **Menu Text Width B** | Type the number of pixels to use for the default width for the text of menu board column B. |
| **Menu Text Width C** | Type the number of pixels to use for the default width for the text of menu board column C. |

# Configuring inventory and procurement for your company

You can configure the way the Portal procurement operates to best suit your company's processes. Some configurations are applied across all sites within a company, while other configurations can be made specific only to a site.

**Note:** If you are setting up your company for the first time, you may want to step through each configuration screen in Company Maintenance individually and configure each setting as you go, using each section's documentation to learn what the configuration settings do. However, many of the Portal configurations interact with each other, and a configuration on one screen may affect how a configuration on a different screen functions. This procedure groups the configurations by how they affect your company, and will help you configure your Portal consistently, even though the steps require switching between several configuration screens.

To configure procurement for your company:

1. Configure your item maintenance defaults used when new items are created.

   See *Configuring inventory options for your company* on page 74.

2. Configure your item variations and additional information fields including:
   - The labels used for item variations or fashions such as colour, size and style.
   - How the fashion variations interact.
   - The labels used for additional information.

   See *Configuring additional information fields for your company* on page 225.

   Also see *Configuring item variation labels for your company* on page 186.

3. Configure your procurement workflow, including
   - Portal Data Interchange with other companies.
   - Automatic price matrix and supplier updates after stock receipts.
   - Pallet scanning and carton tracking.
   - Automatic pack expansion.

   See *Configuring the procurement workflow of your company* on page 173.

4. Configure the security of your procurement processes, including:
   - Controlled requisitions or purchase orders.
   - Cost-editing when ordering.

- Ordering from warehouse and direct debtor suppliers.
- Item and stock maximums.
- Inter-branch transfer processes.

See *Configuring the procurement security for your company* on page 178.

5. Configuring the letterheads and appearance of your requisitions, purchase orders and stock receipts.

   See *Configuring document letterheads for your company* on page 179.

6. Configure the site-specific settings for each site within your company

   See *Configuring inventory and procurement for your site*.

# Configuring the procurement workflow of your company

You can configure the Portal to use a certain workflow to make the procurement process for your organisation either simpler and more streamlined, or more controlled and secure.

At its simplest, you can maintain procurement by simply receipting all stock as it comes in, without tracking purchase orders or requisitions. If you want more control and auditing in your procurement process, you can require a process of requisition through to purchase orders and then stock receipts.

> **Note:** As stock receipts, requisitions and purchase orders can only be created and edited by Portal users with appropriate permissions, you can use permissions to ensure the workflow is followed by the majority of your staff, but can be overridden by specific staff if required. For example, normal staff may only be able to create requisitions, but your Purchasing Officer can directly create a purchase order if necessary.

## Requisitions

For more information on using requisitions, see *Managing requisitions*.

If you do not want to use requisitions, you can skip to the sections below. You can control whether:

- Requisitions must be authorised by Head Office before they can be finalised.

  See the Controlled Requisition field in *Configuring requisition options for your company* on page 149.

  Also see *Controlling requisitions and purchase orders* on page 183.

## Purchase orders

For more information on using purchase orders, see *Managing purchase orders*.

If you do not want to use purchase orders, you can skip to the sections below. You can control whether:

- Items must be present in a contract to be ordered from a supplier.

  See Force Item In Contract - Orders in *Configuring creditor contracts for your site*.

  > **Note:** This option is only relevant if you are using creditor contracts, and must be configured on a per-site basis, not company-wide.

- Items are ordered as packs or individual units.

See *Configuring packs for your site*.

- Purchase orders must be authorised by Head Office before they can be finalised.

  See the Controlled PO field in *Configuring purchase orders for your company* on page 141.

  Also see *Controlling requisitions and purchase orders* on page 183.

- Purchase orders are automatically created from finalised requisitions.

  See the Auto PO field in *Configuring requisition options for your company* on page 149.

- Multiple requisitions can be combined into a group purchase order.

  See the Group PO field in *Configuring requisition options for your company* on page 149.

- Automatic purchase orders are created on a sell-on, order-one basis.

  See the Sales Only for Automatics field in *Configuring purchase orders for your company* on page 141.

  **Note:** This is configured on a per-site basis, not company-wide.

- Purchase orders can be created directly by scanning items with a PDT, or the scanned items held for approval first if you want more oversight in the creation of purchase orders.

  See the PDT to PO field in *Configuring purchase order options for your site*.

## Stock receipts

For more information on using stock receipts, see *Managing stock receipts*.

You can control whether:

- Multiple purchase orders can be received with a single stock receipt.

  See the Single PO per Receipt field in *Configuring stock receipting options for your site*.

- Items are received as packs or individual units.

  See *Configuring packs for your site*.

- Items can only be received if they were ordered, or only the quantity of items ordered can be received.

  See the Items Must Have Been Ordered field in *Configuring stock receipting options for your site*.

Also see the Quantity Allowed to be > than Ordered field in *Configuring stock receipting options for your site*.

> **Note:** This is configured on a per-site basis, not company-wide, and must be configured for both Warehouse receipts and direct supply from debtors (DSD) receipts.

- Items that were supplied but not ordered must be included in a contract to be received or returned.

  See the Force Item In Contract fields in *Configuring creditor contracts for your site*

> **Note:** This option is only relevant if you are using creditor contracts, and must be configured on a per-site basis, not company-wide.

- Stock receipts are streamlined by automatically filling in the quantity ordered as the quantity received.

  See the Verify Order field in *Configuring stock receipting options for your site*.

> **Note:** This is configured on a per-site basis, not company-wide, and must be configured for both Warehouse receipts and direct supply from debtors (DSD) receipts.

- Default suppliers for items are automatically updated from supplier stock receipts.

  See the Skip Supplier Update field in *Configuring stock receipts for your company* on page 157.

- Item retail prices are automatically recalculated when receipted cost changes.

  See the Update Retail on Cost Change field in *Configuring stock receipting options for your site*.

> **Note:** This is configured on a per-site basis, not company-wide.

- Contract prices are automatically updated from stock receipts.

  See the Update Cost of Contract in Receipts field in *Configuring creditor contracts for your site*.

> **Note:** This option is only relevant if you are using creditor contracts, and must be configured on a per-site basis, not company-wide.

- Labels can be automatically printed after stock receipts.

See the Labels field in *Configuring stock receipting options for your site*.

## Stock transfer and data

You can control whether:

- Inter-branch stock transfers require a simple or more secure process.

  See *Finding your IBT level*.

- A Portal Data Interchange (PDI) should be used to streamline suppliers that also use the Portal.

  See *Using the Portal Data Interchange (PDI).*

# Configuring the procurement security for your company

You can configure some of the security aspects of procurement in the Portal to control how much freedom staff members have to do things. More freedom may streamline your procurement process and make it faster and simpler, but it gives less protection against staff making mistakes.

You can configure whether:

- Requisitions and purchase orders should be authorised by Head Office before being finalised.

  See *Controlling requisitions and purchase orders* on page 183.

- Sites should be able to order more than the maximum units of an item in a requisition.

  See the Obey Max field in *Configuring requisition options for your company* on page 149

- Sites should be able to edit the cost of an item in a requisition.

  See the Allow Cost Edit field in *Configuring requisition options for your company* on page 149.

  > **Note:** This configuration can be overridden on a per-site basis, and also configured for warehouse and direct debit (DSD) suppliers. See the **DSD - Allow Cost Edit** and **Warehouse - Allow Cost Edit** fields in *Configuring purchase order options for your site*.

- Individual sites may order from debtor suppliers (DSD) or only from the warehouse.

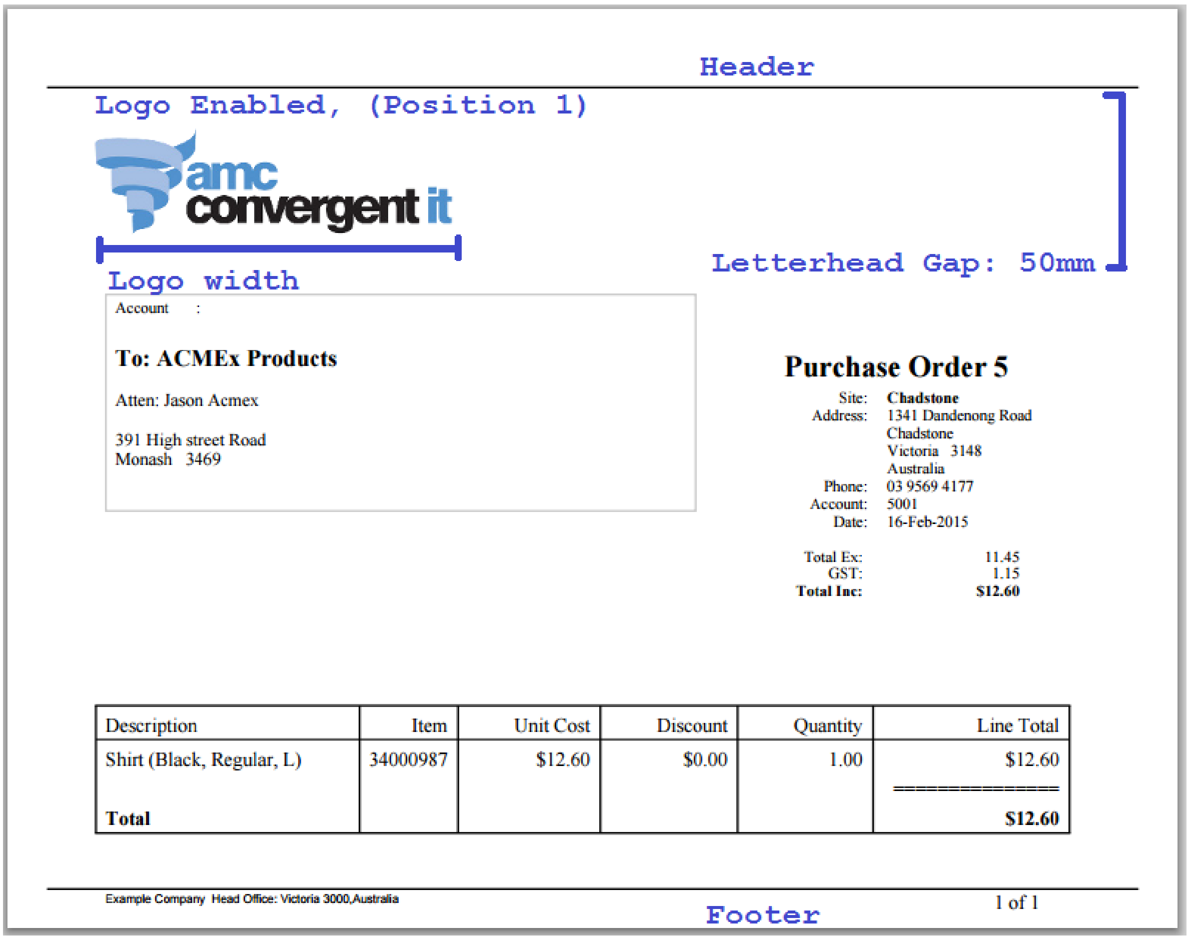
  See the Warehouse - Allowed All field in *Configuring purchase order options for your site*.

- Also see *Configuring supplier types for your sites*.

  > **Note:** This configuration is per-site, not company-wide.

# Configuring document letterheads for your company

You can configure how the Portal incorporates logos and letterheads into your procurement documents, such as purchase orders, requisitions and stock receipts. The procedure for each document is the same, but each is configured separately. This procedure uses a purchase order as an example.



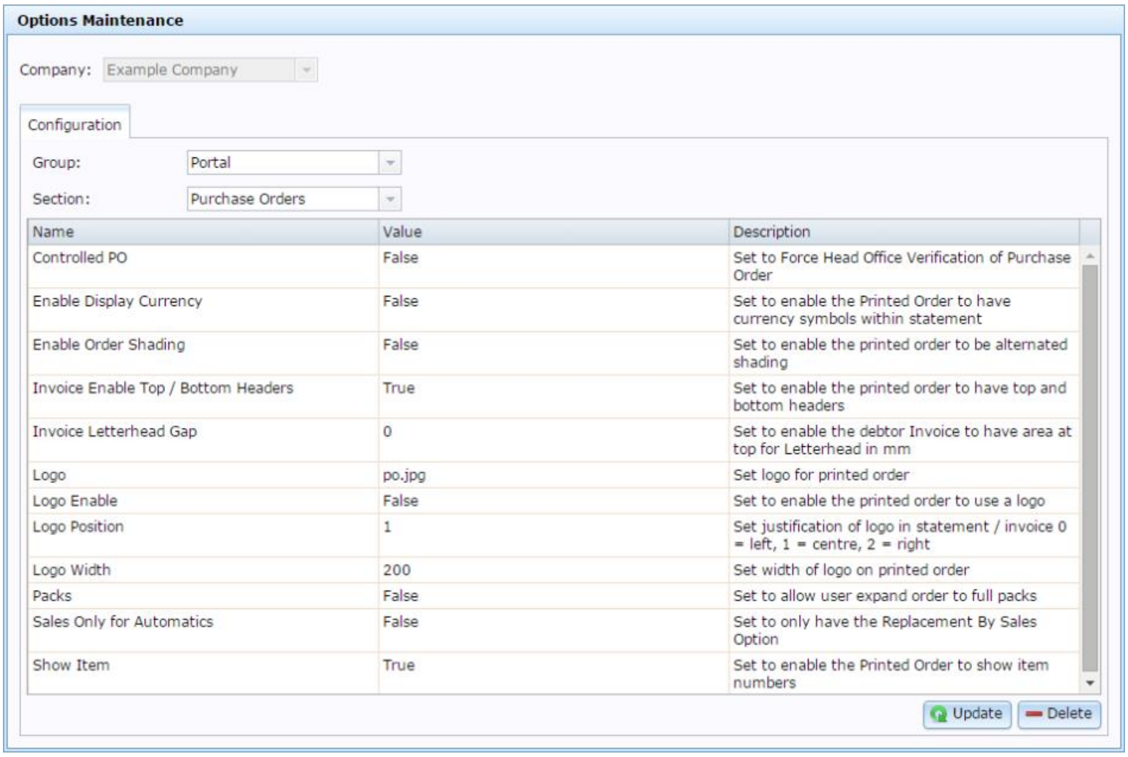

> **Note:** You can also configure procurement documents to shade alternate rows, and display currency and item numbers. See *Configuring purchase orders for your company* on page 141. Also see *Configuring requisition options for your company* on page 149 and *Configuring stock receipts for your company* on page 157.

To configure a document letterhead:

1. If you want to include an image such as a logo in your letterhead, upload that image to the Portal using the Image Manager. See
2. Open the relevant Company Options section. See:

- *Configuring purchase orders for your company* on page 141 for purchase order letterheads.
- *Configuring requisition options for your company* on page 149 for requisition letterheads.
- *Configuring stock receipts for your company* on page 157 for stock receipt letterheads.

3. The section of Company Options Maintenance is displayed.



**Options Maintenance**

Company: Example Company

Configuration

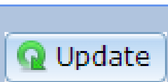
Group: Portal

Section: Purchase Orders

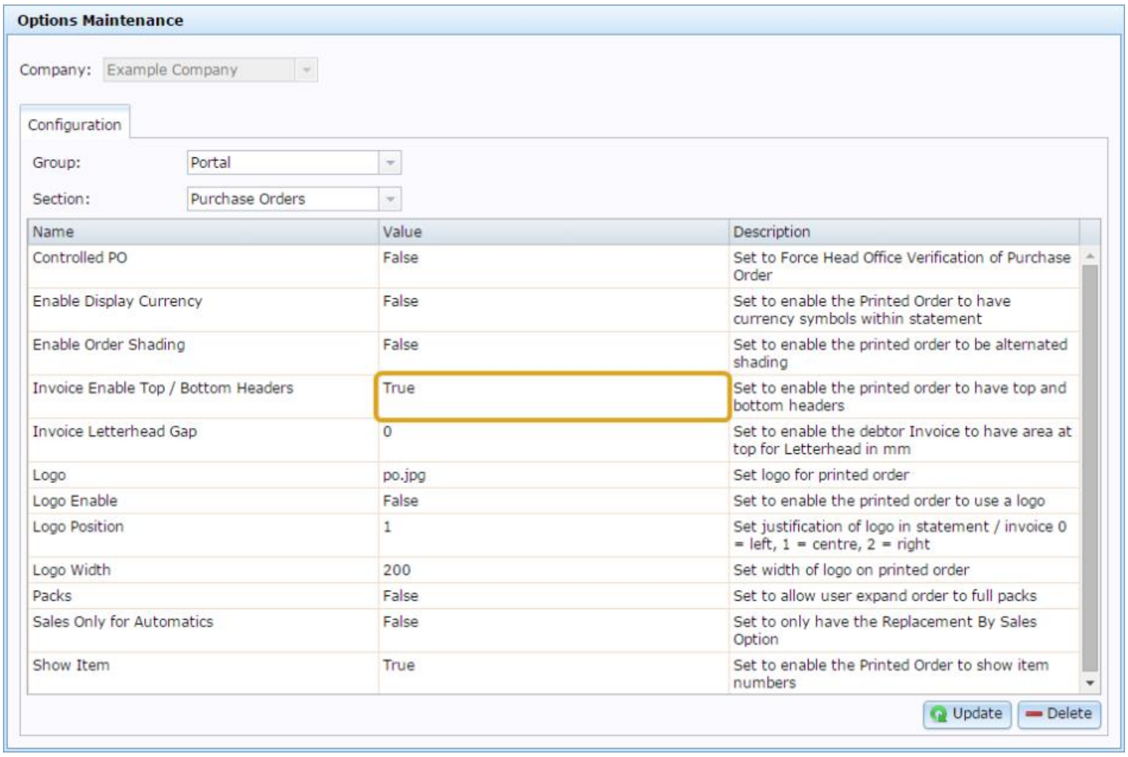
| Name | Value | Description |
|---|---|---|
| Controlled PO | False | Set to Force Head Office Verification of Purchase Order |
| Enable Display Currency | False | Set to enable the Printed Order to have currency symbols within statement |
| Enable Order Shading | False | Set to enable the printed order to be alternated shading |
| Invoice Enable Top / Bottom Headers | True | Set to enable the printed order to have top and bottom headers |
| Invoice Letterhead Gap | 0 | Set to enable the debtor Invoice to have area at top for Letterhead in mm |
| Logo | po.jpg | Set logo for printed order |
| Logo Enable | False | Set to enable the printed order to use a logo |
| Logo Position | 1 | Set justification of logo in statement / invoice 0 = left, 1 = centre, 2 = right |
| Logo Width | 200 | Set width of logo on printed order |
| Packs | False | Set to allow user expand order to full packs |
| Sales Only for Automatics | False | Set to only have the Replacement By Sales Option |
| Show Item | True | Set to enable the Printed Order to show item numbers |

Update Delete

4. Type True in the Value field for Enable Top / Bottom Headers to enabled letterheads for this document.

**Note:** Remember to press 

after changing each value so your changes are correctly saved.




5. Type the number of millimetres your letterhead should take up in the Value field for Letterhead Gap.

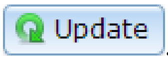
   This is how much room the Portal gives for the letterhead before printing the purchase order. You may want to adjust this if the page looks crowded.

6. Type the file name of the logo file you uploaded in the Value field for Logo.

> **Note:** You do not need to include the full URL, just the file name including any subfolders in your Image Manager. For example, if your logo is called **logo.jpg** and is stored under the folder **Business** in Image Manager, the value should be **Business/logo.jpg**. All file and folder names must match exactly, including upper and lowercase letters.

7. Type True in the Value field for Logo Enable.
8. Set where in the header you want to logo to appear by typing one of the following values in the Value field for Logo Position:
   - To put the logo on the left side of the header, type 1.
   - To put the logo in the middle of the header, type 2.
   - To put the logo on the right side of the header, type 3.
9. Type how many pixels wide the logo should be in the Value field for Logo Width.

> **Note:** If the logo is smaller or larger than this, it is automatically resized by the Portal.

10. Press .

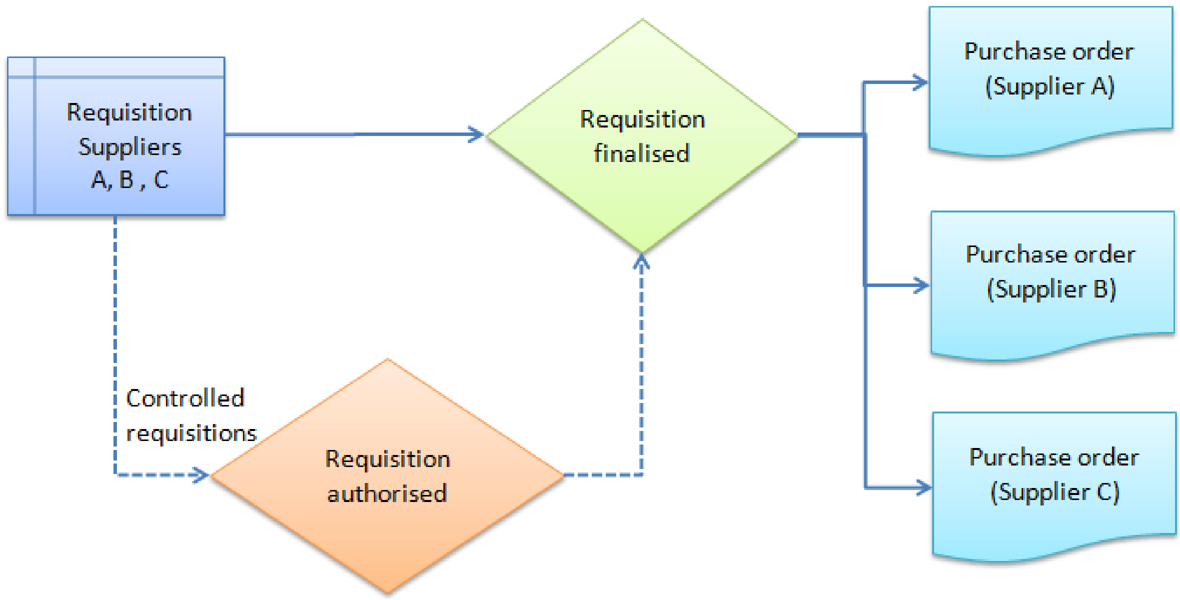
    The letterhead is configured for this type of document.

> **Note:** Configuring letterheads for one area, such as purchase orders, has no effect on the configuration of letterheads in other areas, such as requisitions or stock receipts. You must configure each individually.

# Controlling requisitions and purchase orders

You can use controlled purchase orders and requisitions if you want a level of central authorisation required in the procurement process.

A controlled purchase order or requisition must be authorised by Head Office before it can be finalised and proceed to the next stage in the procurement process. Uncontrolled purchase orders or requisitions do not need any input from Head Office, and can be immediately finalised.




When a controlled purchase order or requisition is ready to be finalised:

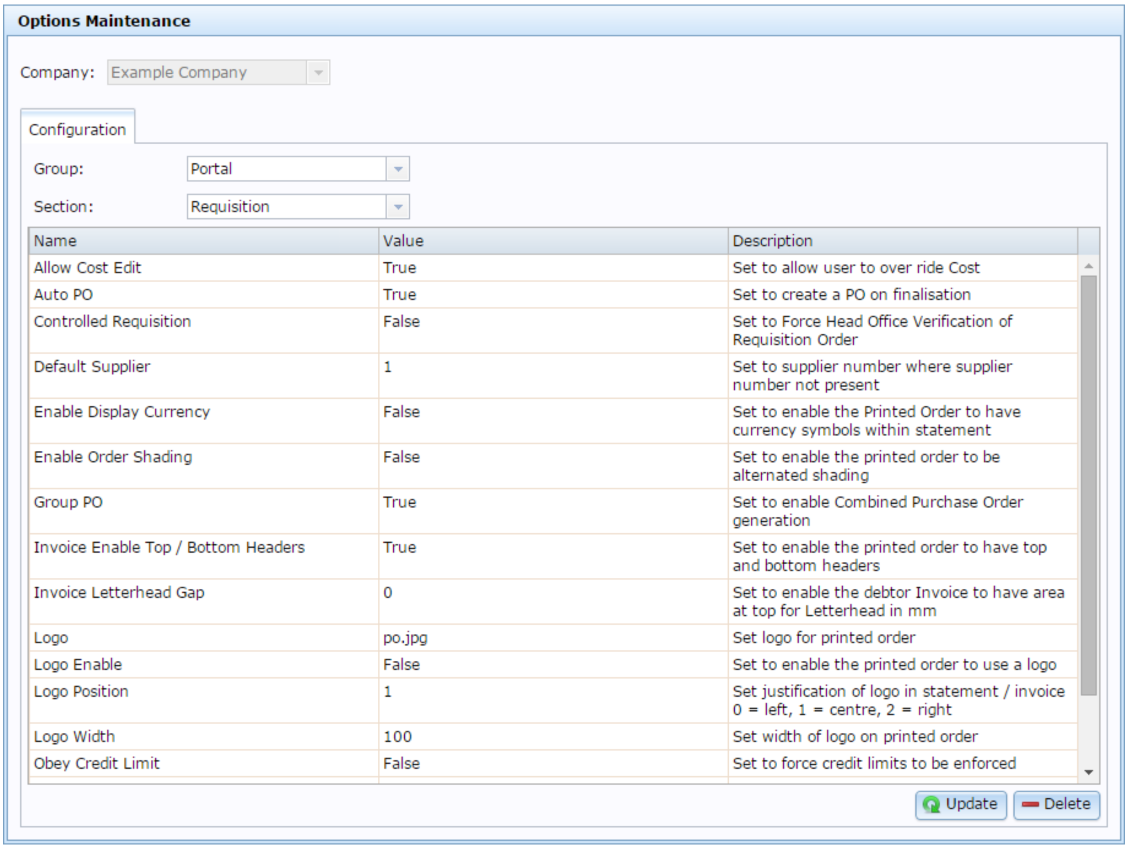
1. The Portal user requests authorisation by pressing Email HQ.
2. An email is sent to the Head Office person responsible with a link to the purchase order or requisition.
3. Head Office views the requisition or purchase order, makes any changes required and authorises it.
4. The requisition or purchase order can then be finalised.

# Controlling requisitions

To set requisitions to be controlled:

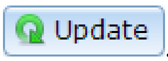
1. Open the Requisition section of Company Options Maintenance.

   See *Configuring requisition options for your company* on page 149.




| Name | Value | Description |
|---|---|---|
| Allow Cost Edit | True | Set to allow user to over ride Cost |
| Auto PO | True | Set to create a PO on finalisation |
| Controlled Requisition | False | Set to Force Head Office Verification of Requisition Order |
| Default Supplier | 1 | Set to supplier number where supplier number not present |
| Enable Display Currency | False | Set to enable the Printed Order to have currency symbols within statement |
| Enable Order Shading | False | Set to enable the printed order to be alternated shading |
| Group PO | True | Set to enable Combined Purchase Order generation |
| Invoice Enable Top / Bottom Headers | True | Set to enable the printed order to have top and bottom headers |
| Invoice Letterhead Gap | 0 | Set to enable the debtor Invoice to have area at top for Letterhead in mm |
| Logo | po.jpg | Set logo for printed order |
| Logo Enable | False | Set to enable the printed order to use a logo |
| Logo Position | 1 | Set justification of logo in statement / invoice 0 = left, 1 = centre, 2 = right |
| Logo Width | 100 | Set width of logo on printed order |
| Obey Credit Limit | False | Set to force credit limits to be enforced |

2. Type True in the Value field for Controlled Requisition.

3. Press 
.

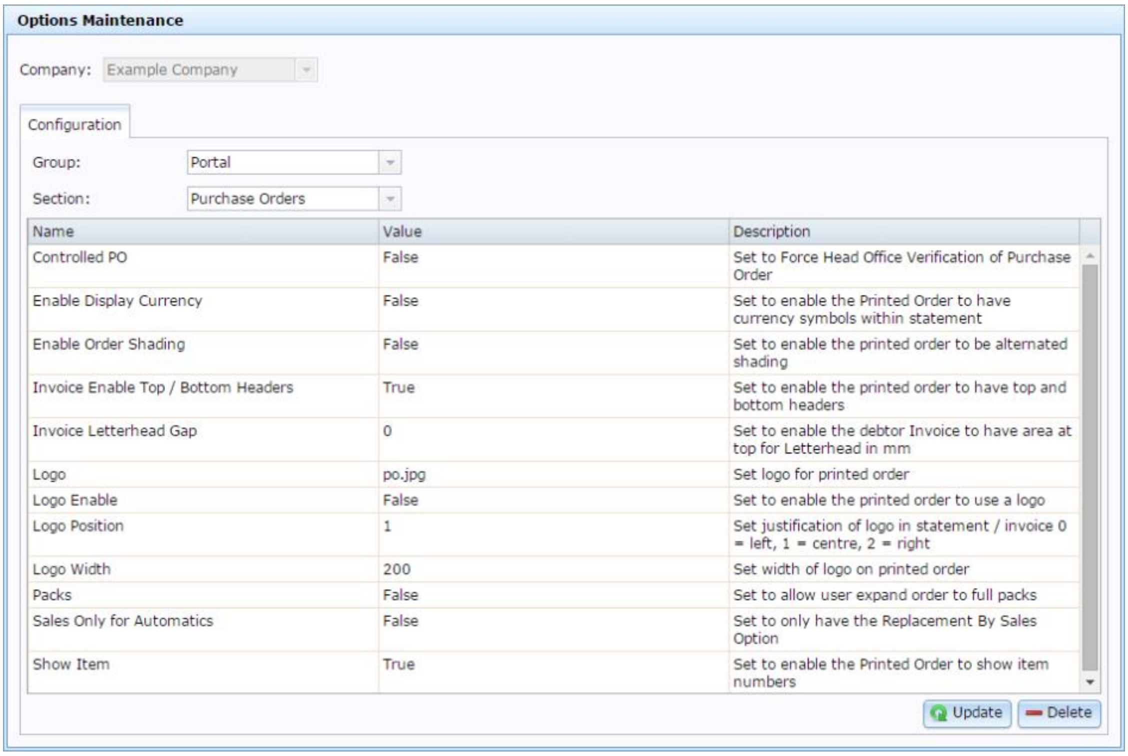
   Requisitions must be authorised by Head Office before they can be finalised.

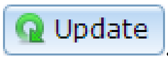
# Controlling purchase orders

To set purchase orders to be controlled:

1. Open the Purchase orders section of Company Options Maintenance.

   See *Configuring purchase orders for your company* on page 141.




2. Type True in the Value field for Controlled PO.
3. Press 

.

   Purchase orders must be authorised by Head Office before they can be finalised.

# Configuring item variation labels for your company

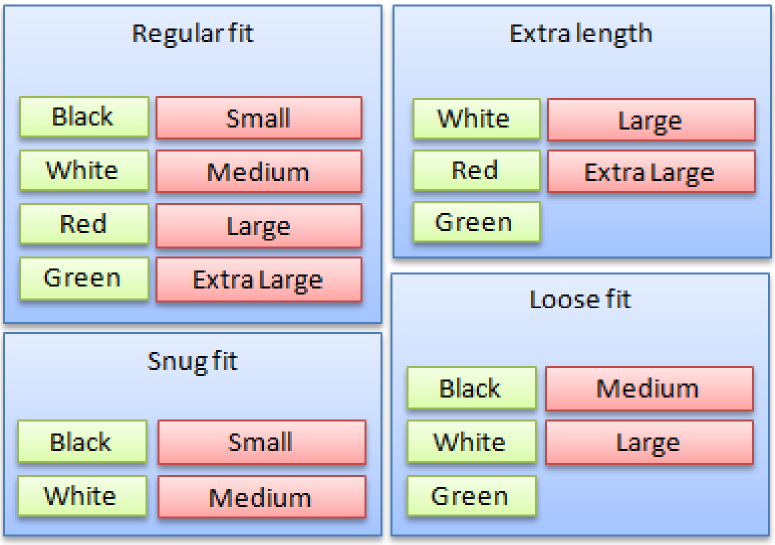
The Portal provides three groups of item variation, called Fashion. The default labels used by the Portal are Style, Colour and Size.

> **Note:** This feature can be disabled by setting **Enable Colour Information** to **False** in the Inventory area of Company Maintenance. See *Configuring inventory options for your company* on page 74

Each group can list any number of options.


> **Note:** You can rename these groups to match your company's requirements, such as hardware categories or food preparation types. If you rename these groups, all reports and maintenance screens use these names instead of the defaults. This documentation will refer to them using the Portal defaults. See *Configuring item variations for your company* on page 65.

Colour and size is related to style. After all your colour, size and style options are defined, you must specify which colours and sizes are available for each style.



Each item can have a single style selected, and then a single colour and size selected from the colours and sizes available for that style. Using item variations allows you to view and group items in particular reports, and also quickly order variations of items using purchase orders.

To configure your company's item variations, or Fashion:

1. Define the Fashion labels, if you want your Portal configuration to use something other than Style, Size and Colour.

   For example, a food store may use Food Group, Storage (canned, freeze dried, etc) and Quality (Homebrand, Premium, Organic, etc).

   See *Configuring item variations for your company* on page 65.

2. Create the Style, Size and Colour options you want. See:
   - *Creating a style* on page 209.
   - *Creating a size* on page 197.
   - *Create a colour* on page 188.
3. For each style, assign the colour and size options available.

   See *Linking colours and sizes to styles* on page 213.

## Also see:

- *Style Edit report* on page 216.
- *Size Edit report* on page 204.
- *Colour Edit report* on page 192.*Style Maintenance screen* on page 218
- *Style Maintenance screen* on page 218.
- *Style Maintenance (styles) screen* on page 221.
- *Size Maintenance screen* on page 206.
- *Colour Maintenance screen* on page 194.

# Create a colour

Create a fashion colour so that you can add style and colour variations to items via the Information tab of that item's Inventory Maintenance screen.

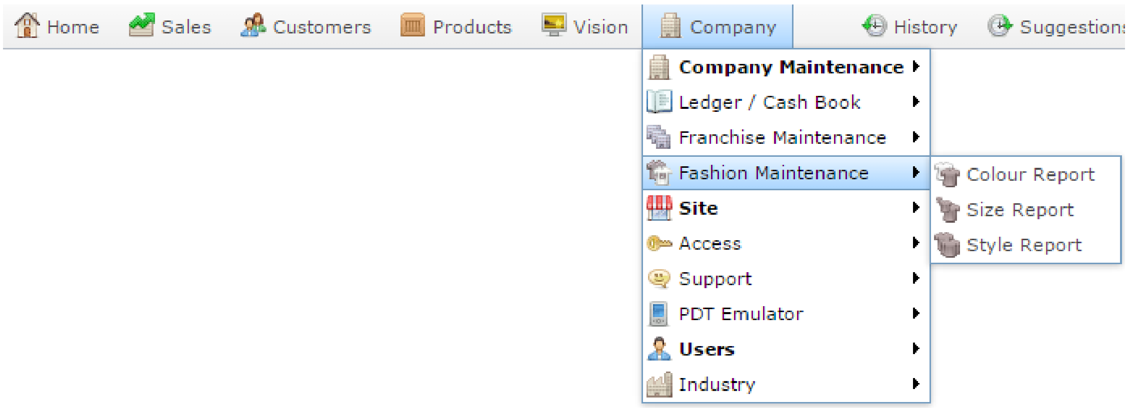
**Note:** Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company* on page 186.

**Note:** Colours must be linked to styles before they can be selected for an item. See *Linking colours and sizes to styles* on page 213.

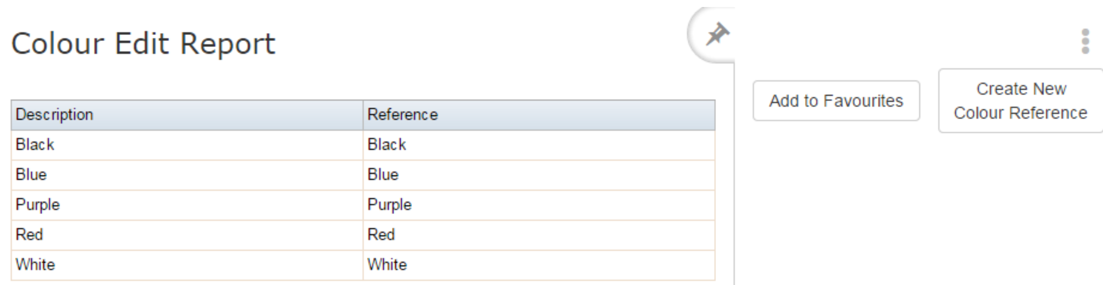
To create a colour:

1. Press 

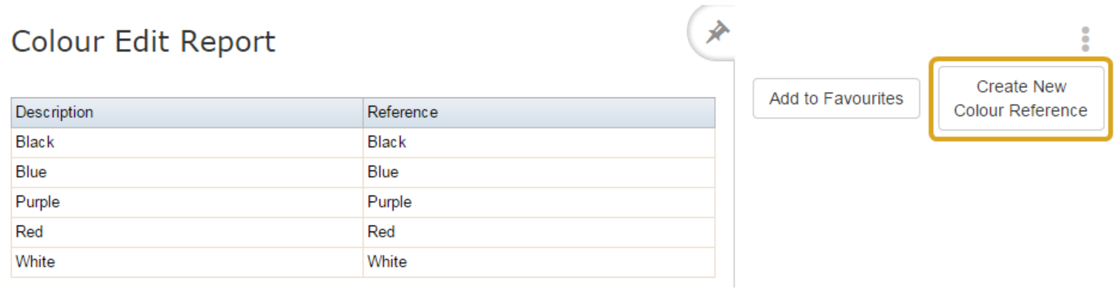
in the main menu bar.
2. Press Fashion Maintenance > Colour Report.



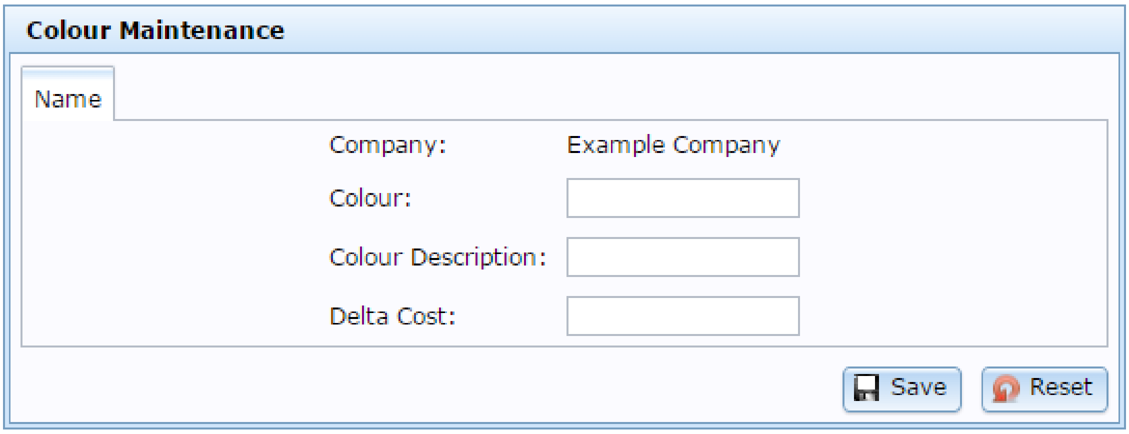

The Colour Edit Report is displayed.




3. Press Create New Colour Reference.




The Colour Maintenance screen is displayed.




4. Type the name of the colour in the Colour field.
5. Type a short description of the colour in the Colour Description field.
6. If the colour is more or less expensive, type the negative or positive change in cost in the Delta Cost field.

   For example, if this colour is $0.20 more expensive, type .20. If the colour is $5 less expensive, type -5.

> **Note:** This is a fixed amount, not a percentage.

7. Press 

.

   The colour is created.

# Editing a colour

Edit a fashion colour if you want to change is description or delta cost.

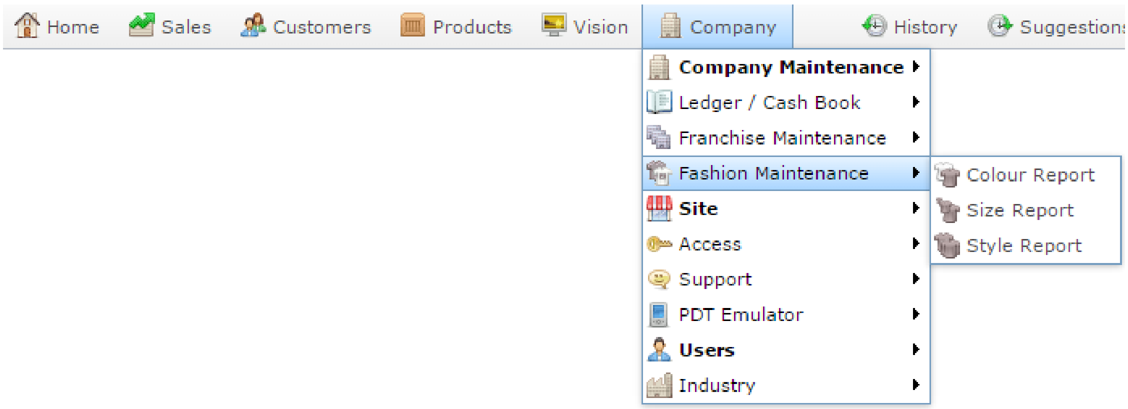
Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company* on page 186.

> **Note:** If you want to change which styles a colour is linked to, see *Linking colours and sizes to styles* on page 213.

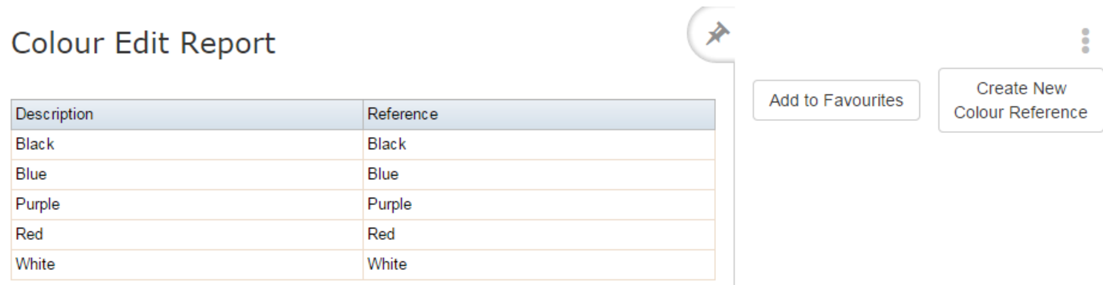
To edit a colour:

1. Press 

in the main menu bar.
2. Press Fashion Maintenance > Colour Report.

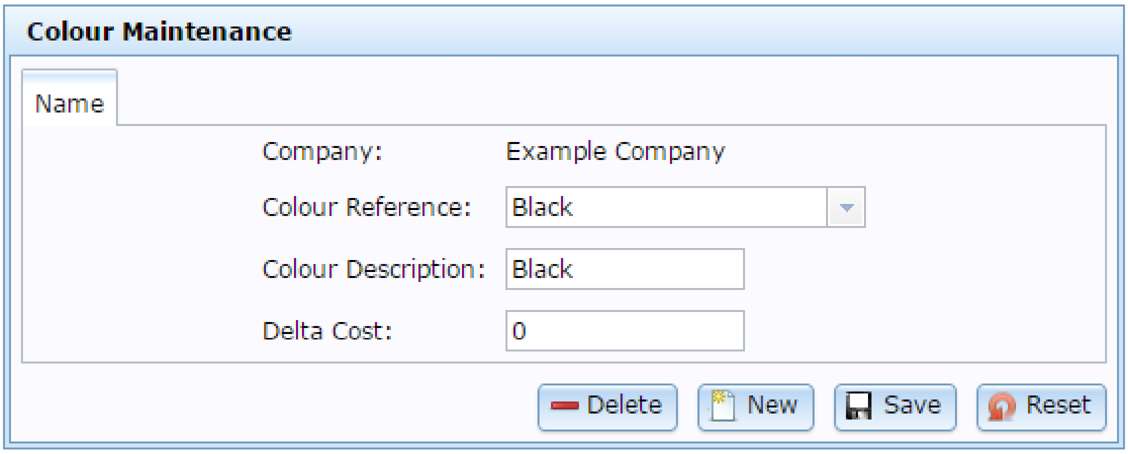



The Colour Edit Report is displayed.




3. Press the description of the colour you want to edit.

The Colour Maintenance screen is displayed.




4. Edit the fields you want to edit.
5. Press 

.

   The colour is saved.

# Colour Edit report

Use the Colour Edit report to view the colours available to your company and open them for edit.

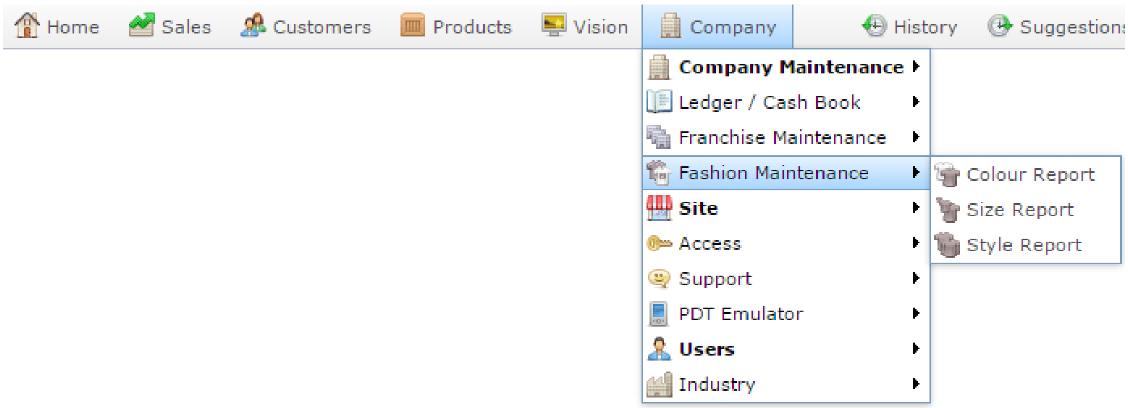
**Note:** If you are looking for the screen that allows you to enable colours and colours for styles, see *Style Maintenance (styles) screen* on page 221.

## Opening the Colour Edit report

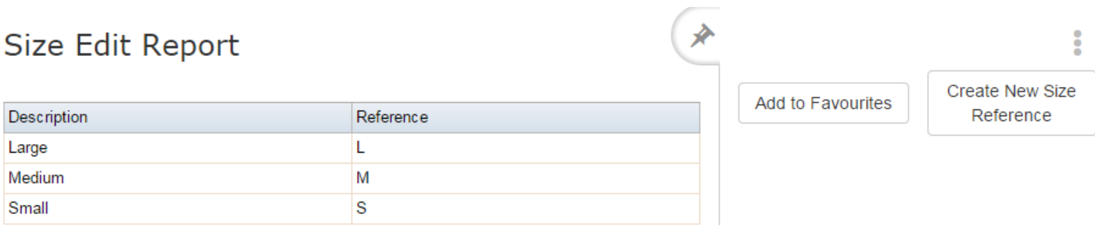
To open the Colour Edit report:

1. Press 

in the main menu bar.
2. Press Fashion Maintenance > Colour Report.




The Colour Edit report is displayed.



## Colour Edit report key fields and buttons

| Field | Description |
|---|---|
| Add to Favourites | Press to add this report to your Portal favourites for easier access. |
| Create New Colour Reference | Press to create a new colour.<br>See *Create a colour* on page 188. |
| **Description** | The description of the existing colour. Press to open the colour.<br>See *Editing a colour* on page 190. |
| **Reference** | The name of the colour. |

# Colour Maintenance screen

Use the Colour Maintenance screen to create colours for use as item variations.

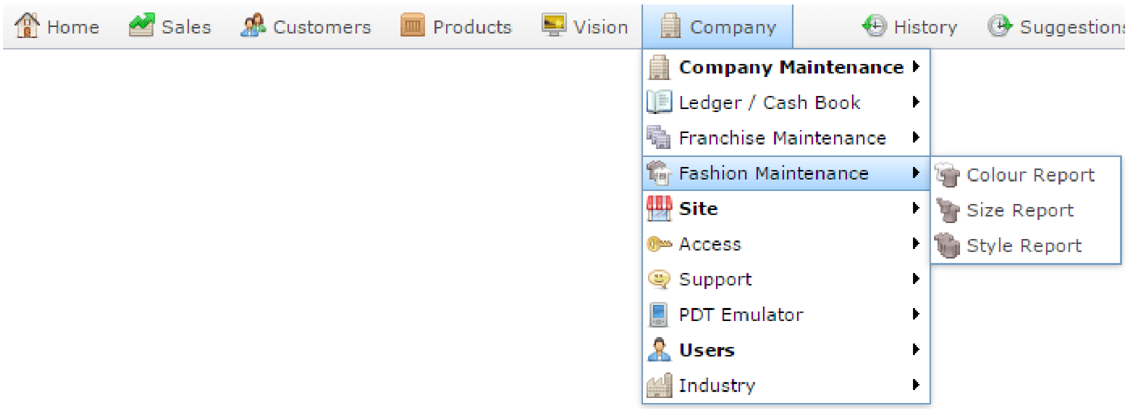
> **Note:** If you are looking for the screen that allows you to enable colours and sizes for styles, see *Style Maintenance (styles) screen* on page 221.

## Opening the Colour Maintenance screen

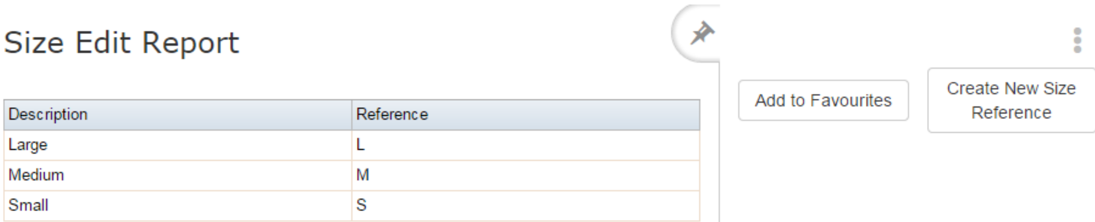
To open the Colour Maintenance screen:

1. Press  in the main menu bar.

2. Press Fashion Maintenance > Colour Report.

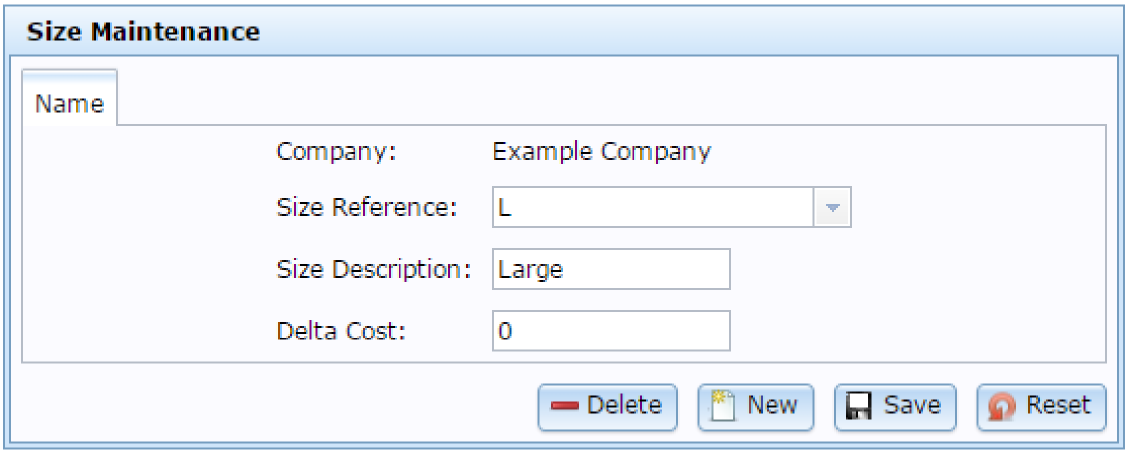



The Colour Edit Report is displayed.




3. Press the description of the colour you want to edit.

   The Colour Maintenance screen is displayed.




## Colour Maintenance screen key fields and buttons

| Field | Description |
| --- | --- |
| **Company** | The company this colour was created under. |
| **Colour Reference** | The name of the colour. |
| **Colour Description** | A short description of the colour. |
| **Delta Cost** | The difference in price that selecting this colour incurs. |
| Delete | Delete this colour. |
| New | Create a new colour.<br>See *Create a colour* on page 188. |
| Save | Save any changes to this colour. |

| Field | Description |
|---|---|
|  | Revert any changes to this colour. |

# Creating a size

Create a fashion size so that you can add style and size variations to items.

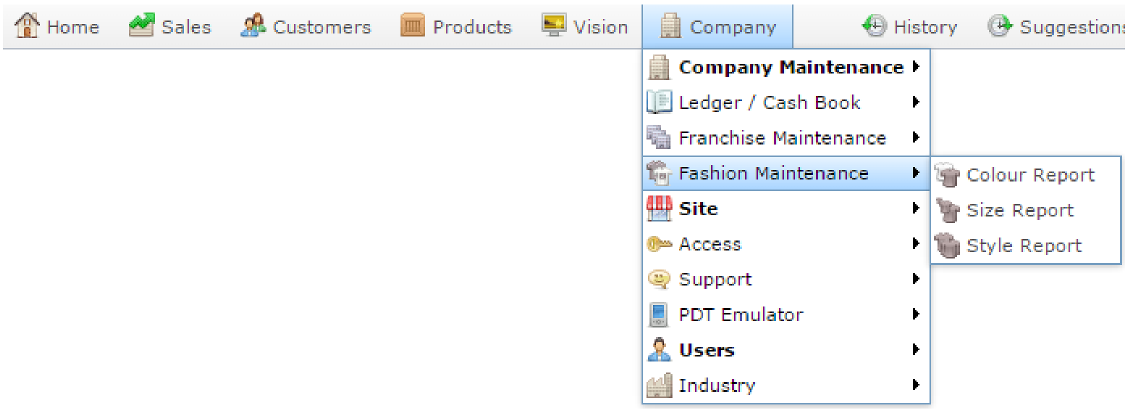
Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company* on page 186.

**Note:** Sizes must be linked to styles before they can be selected for an item. See *Linking colours and sizes to styles* on page 213.

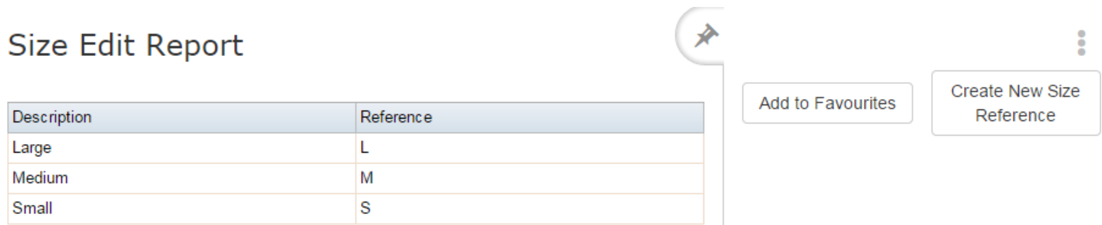
To create a size:

1. Press 

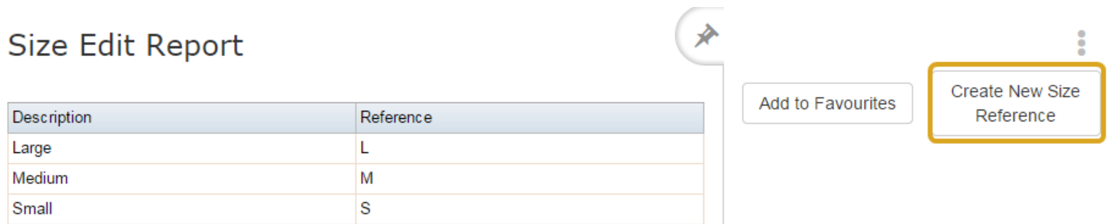
in the main menu bar.
2. Press Fashion Maintenance > Size Report.



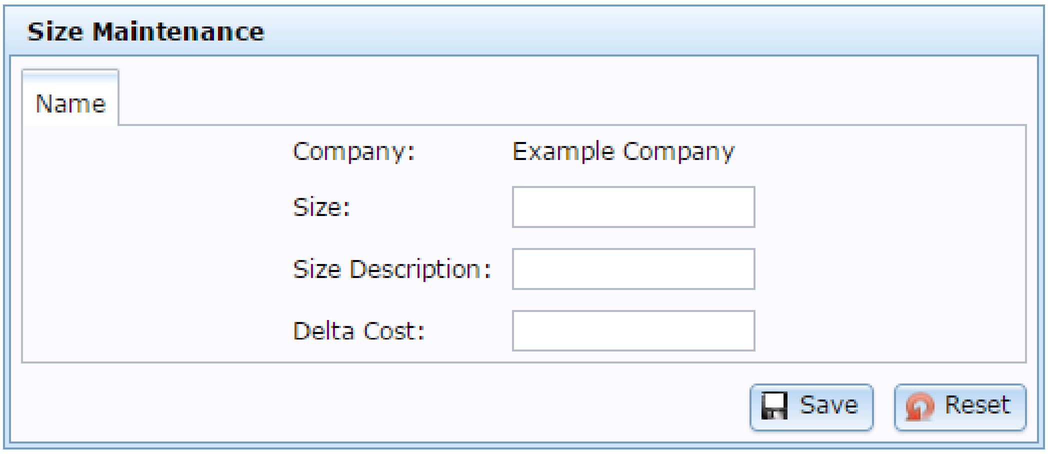

The Size Edit Report is displayed.




3. Press Create New Size Reference.




The Size Maintenance screen is displayed.




4. Type the name of the size in the Size field.
5. Type a short description of the size in the Size Description field.
6. If the size is more or less expensive, type the negative or positive change in cost in the Delta Cost field.

   For example, if this size is $0.20 more expensive, type .20. If the size is $5 less expensive, type -5.

7. Press 
.

   The size is created.

# Editing a size

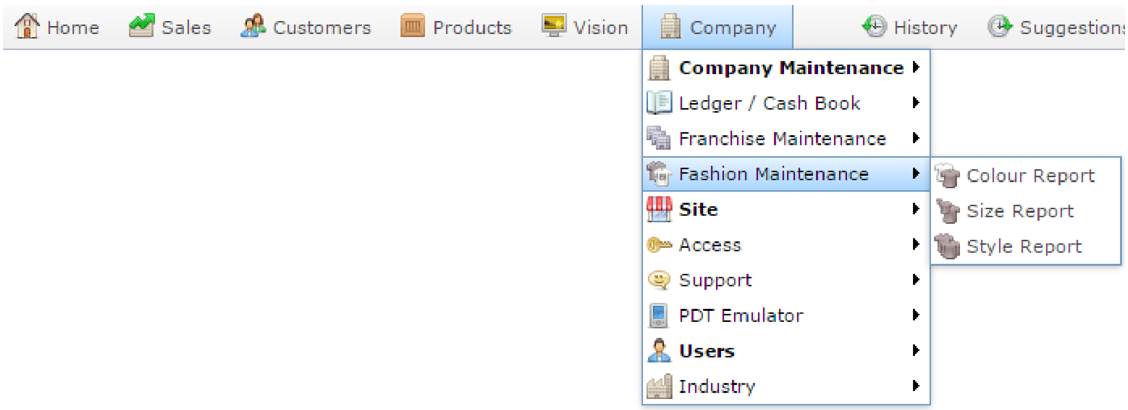
Edit a fashion size if you want to change is description or delta cost..

Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company* on page 186.

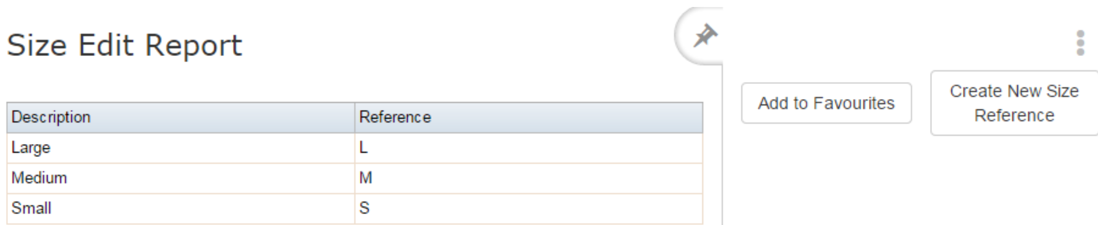
**Note:** If you want to change which styles a size is linked to, see *Linking colours and sizes to styles* on page 213.

To edit a size:

1. Press   in the main menu bar.
2. Press Fashion Maintenance > Size Report.

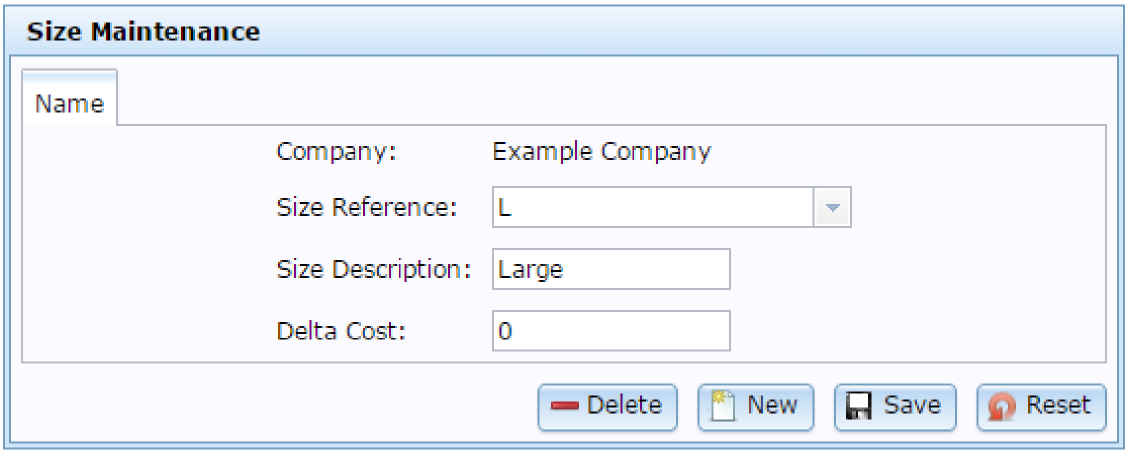



The Size Edit Report is displayed.




3. Press the description of the size you want to edit.

   The Size Maintenance screen is displayed.




4. Type the changes you want to make into the fields.
5. Press 

.

   The size is saved.

# Linking colours and sizes to styles

Link sizes and colours to styles in order to select them for item variations. Each style can have a specific size and colour selection enabled, and colours and sizes can be enabled for several different styles.

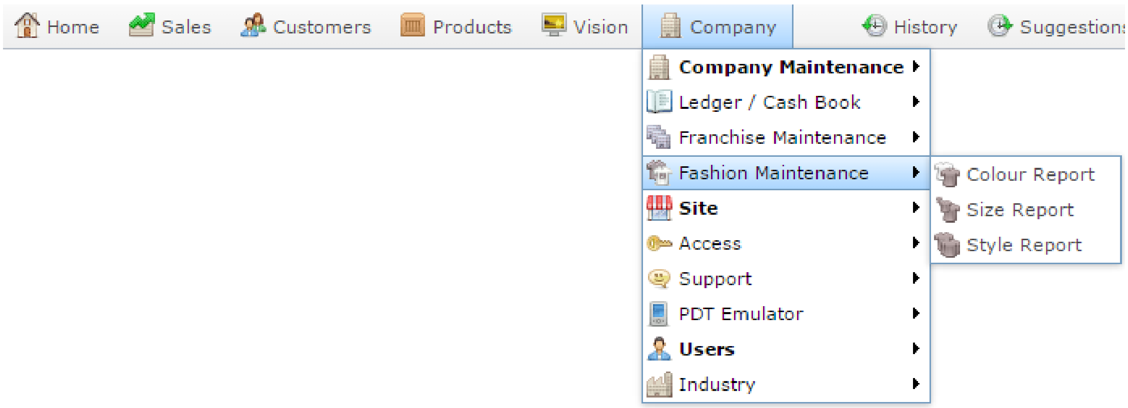
Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company* on page 186.

**Note:** Colour and size are applied independently within a style. You cannot restrict colours to particular sizes only within a style, or vice versa.

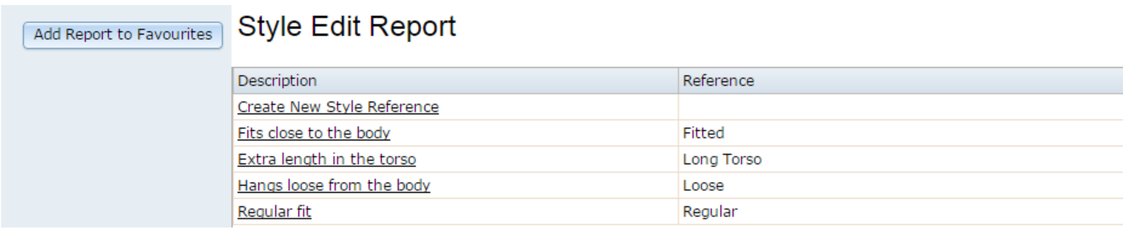
To link a colour or size to a style:

1. Press 

in the main menu bar.
2. Press Fashion Maintenance > Style Report.



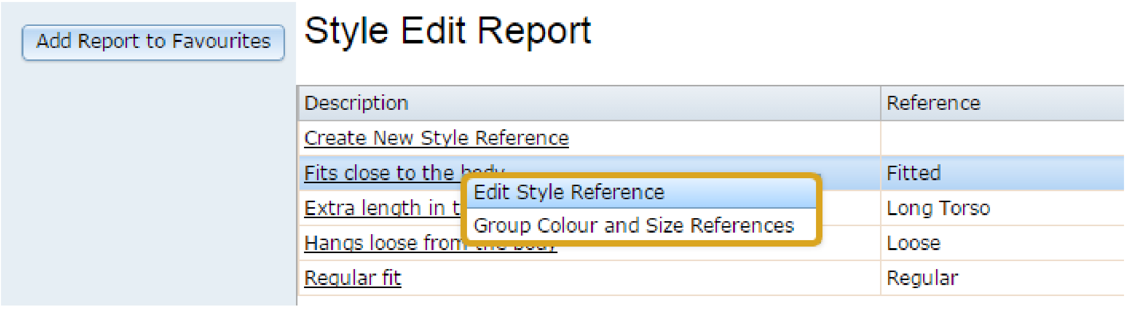

The Style Edit Report is displayed.




| Description | Reference |
|---|---|
| Create New Style Reference | |
| Fits close to the body | Fitted |
| Extra length in the torso | Long Torso |
| Hangs loose from the body | Loose |
| Regular fit | Regular |

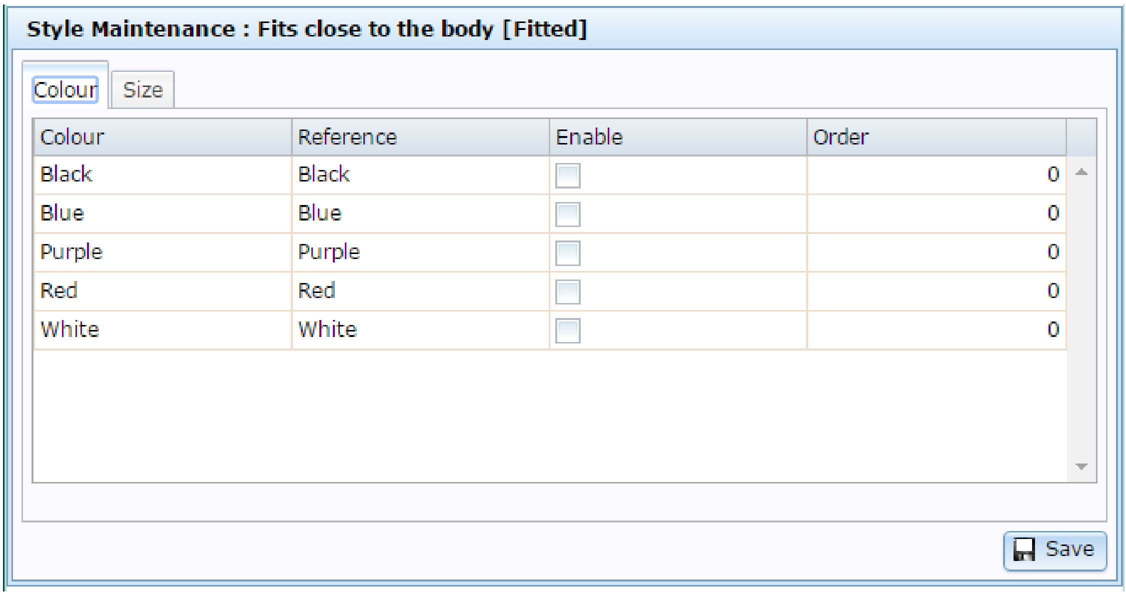
3. Press the description of the style you want to link sizes and colours to.

A popup menu is displayed.



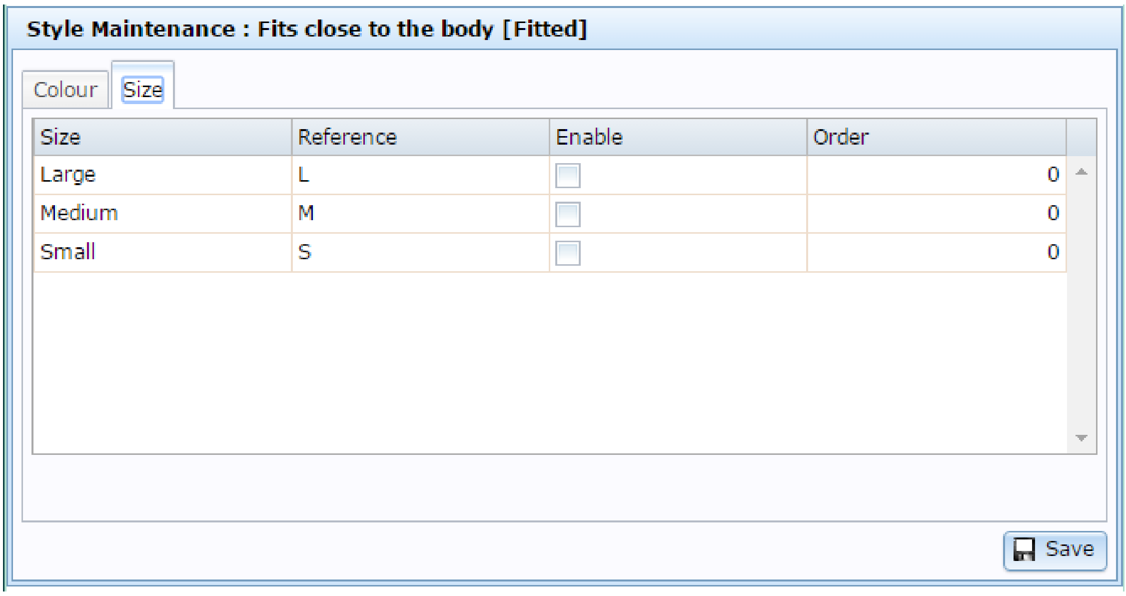

4. Press Group Colour and Size References.

   The Colour tab of the Style Maintenance(Style) screen is displayed.




5. Press the Enable field for each colour you want to be available for this style.
6. Press the Size tab.

   The Size tab of the Style Maintenance (Style) screen is displayed.




7. Press the Enable field for each size you want to be available for this size.
8. Press 

.

   The style selections are saved.

# Size Edit report

Use the Size Edit report to view the sizes available to your company and open them to edit.

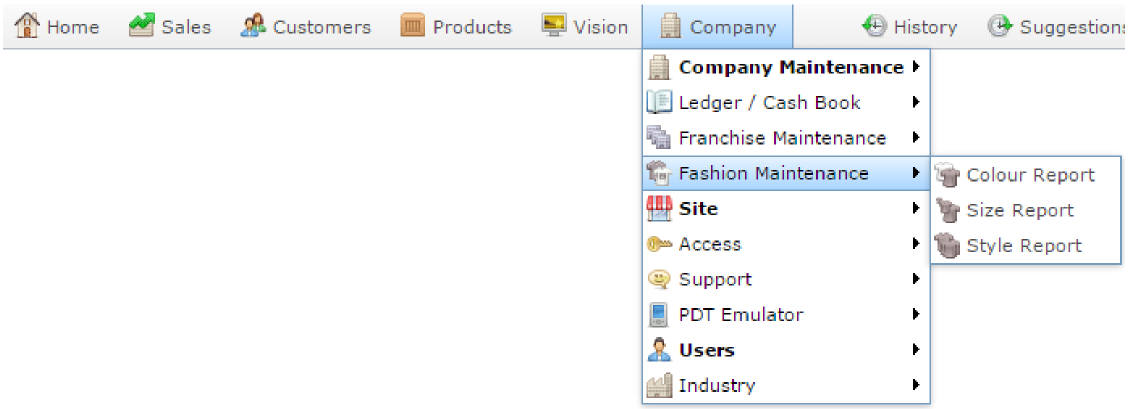
> **Note:** If you are looking for the screen that allows you to enable colours and sizes for styles, see *Style Maintenance (styles) screen* on page 221.

## Opening the Size Edit report

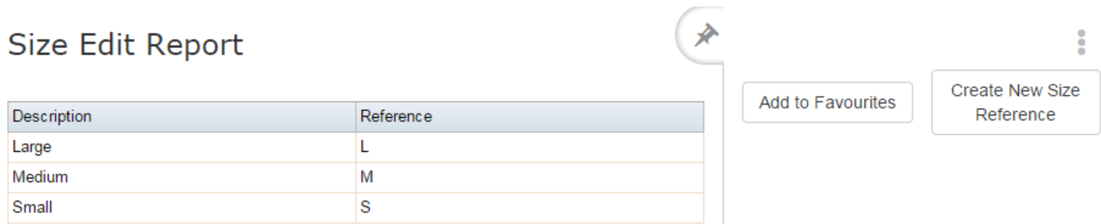
To open the Size Edit report:

1. Press 

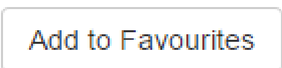
in the main menu bar.
2. Press Fashion Maintenance > Size Report.




The Size Edit Report is displayed.




## Size Edit report key fields and buttons

| Field | Description |
|---|---|
|   | Press to add this report to your Portal favourites for easier access. |

| Field | Description |
|---|---|
| Create New Size Reference | Press to create a new size.<br>See *Creating a size* on page 197. |
| **Description** | The description of the existing size. Press to open the size.<br>See *Editing a size* on page 199. |
| **Reference** | The name of the size. |

# Size Maintenance screen

Use the Size Maintenance screen to create sizes for use as item variations.

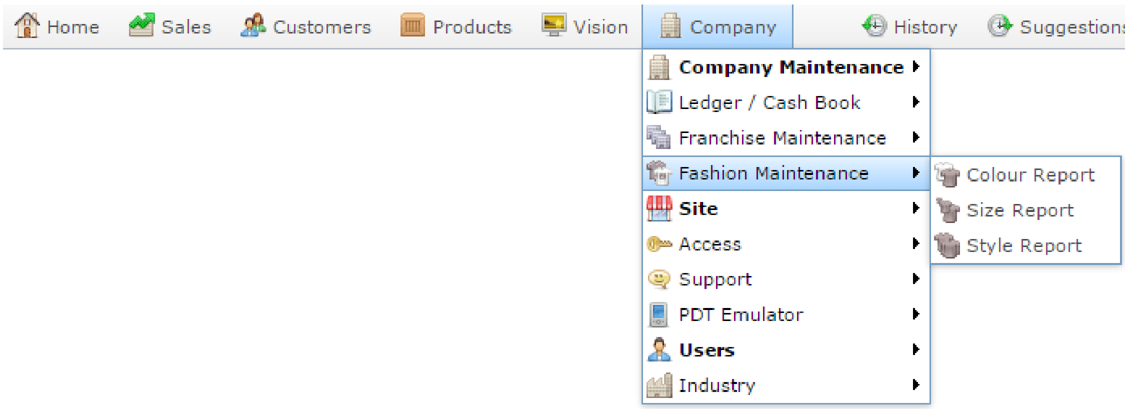
> **Note:** If you are looking for the screen that allows you to enable colours and sizes for styles, see *Style Maintenance (styles) screen* on page 221.

## Opening the Size Maintenance screen

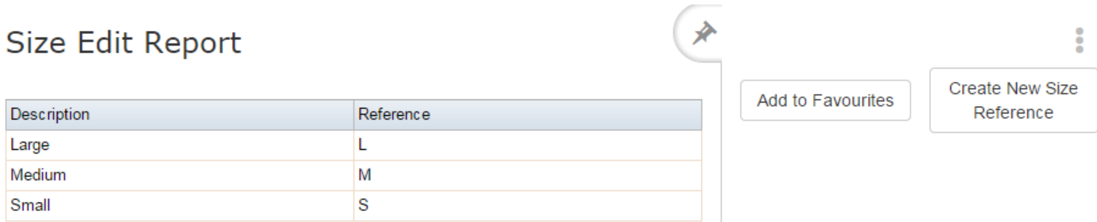
To open the Size Maintenance screen:

1. Press 

in the main menu bar.
2. Press Fashion Maintenance > Size Report.

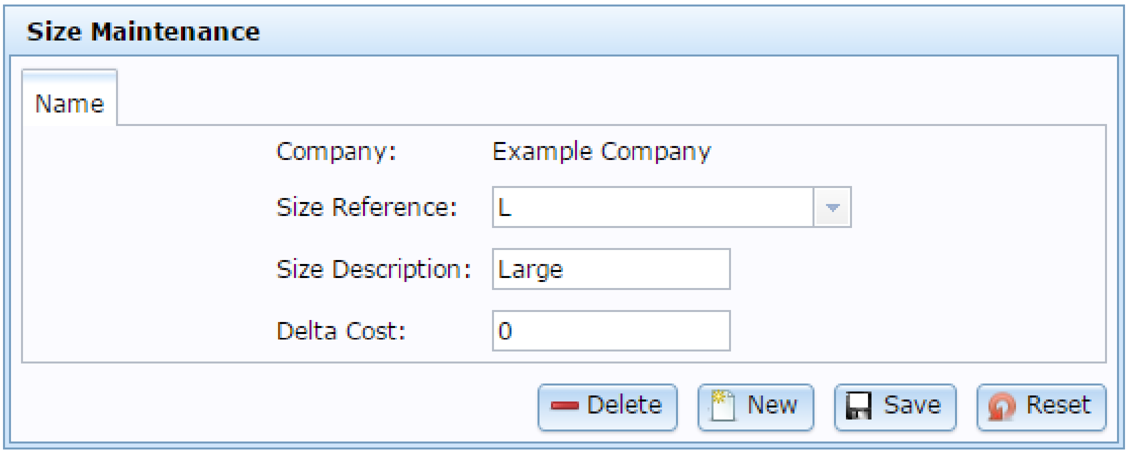



The Size Edit Report is displayed.




3. Press the description of the size you want to edit.

The Size Maintenance screen is displayed.




## Size Maintenance screen key fields and buttons

| Field | Description |
|---|---|
| **Company** | The company this size was created under. |
| **Size Reference** | The name of the size. |
| **Size Description** | A short description of the size. |
| **Delta Cost** | The difference in price that selecting this size incurs. |
| Delete | Delete this size. |
| New | Create a new size.<br>See *Creating a size* on page 197. |
| Save | Save any changes to this size. |

| Field | Description |
|---|---|
|   | Revert any changes to this size. |

# Creating a style

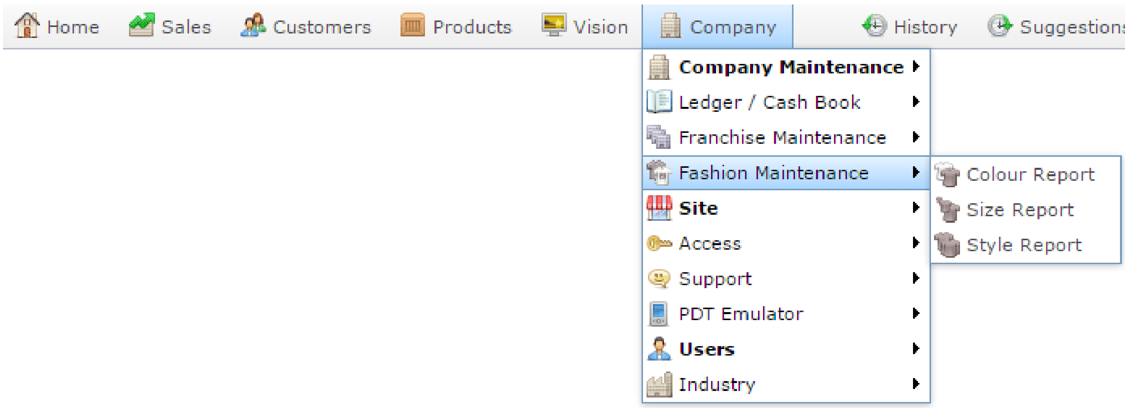
Create a fashion style so that you can assign style, size and colour variations to items.

Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company* on page 186.

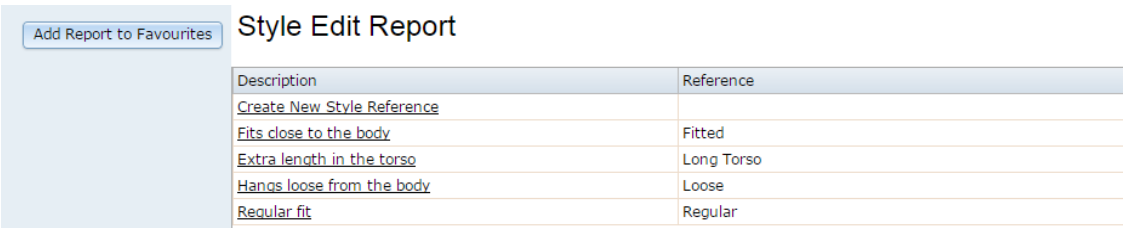
To create a style:

1. Press 

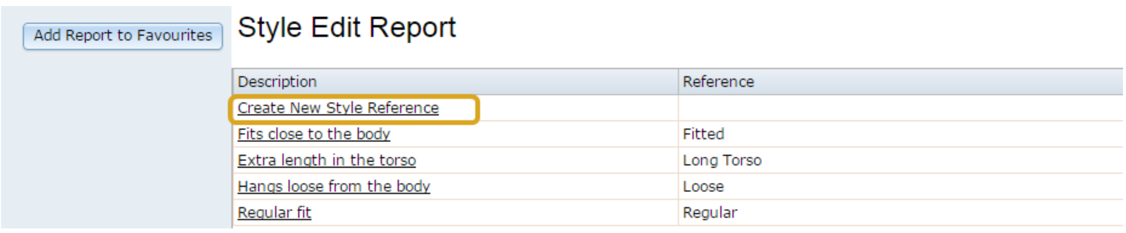
in the main menu bar.
2. Press Fashion Maintenance > Style Report.



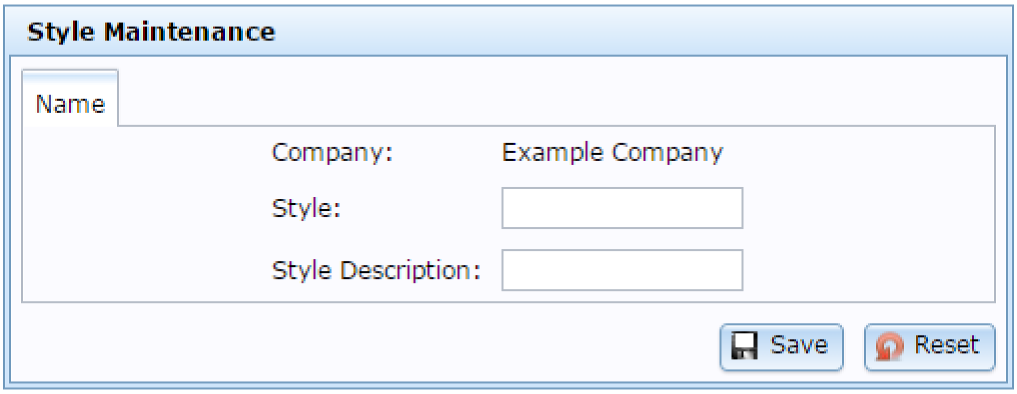

The Style Edit Report is displayed.




3. Press Create New Style Reference.




The Style Maintenance screen is displayed.




4. Type the name of the style in the Style field.
5. Type a short description of the style in the Style Description field.
6. Press .

   The style is created.

# Editing a style

Edit a fashion style to change its description or name.

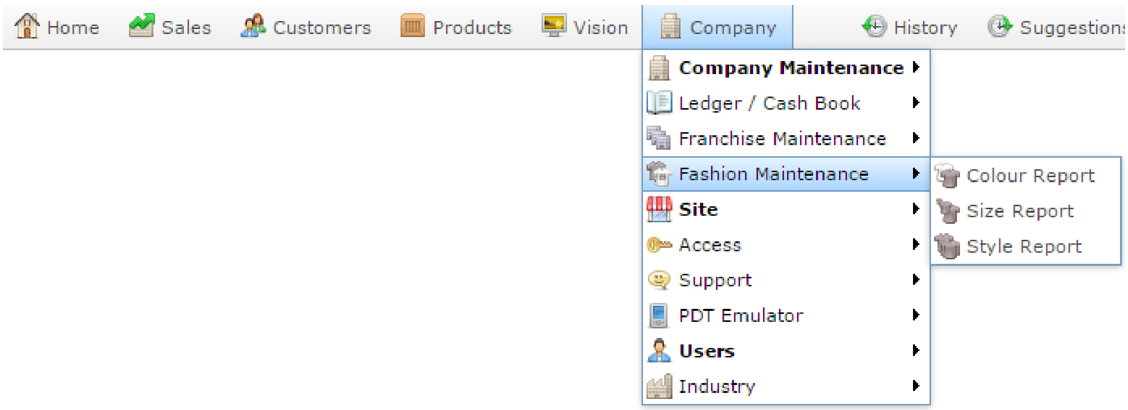
Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company* on page 186.

**Note:** If you want to change what sizes or colours are linked with a style, see *Linking colours and sizes to styles* on page 201

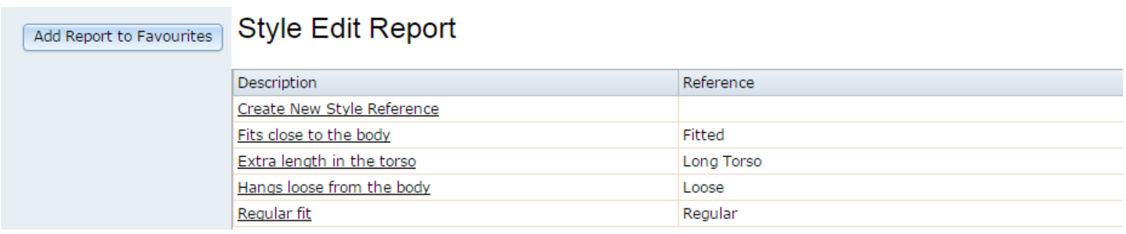
To edit a style:

1. Press 

in the main menu bar.
2. Press Fashion Maintenance > Style Report.



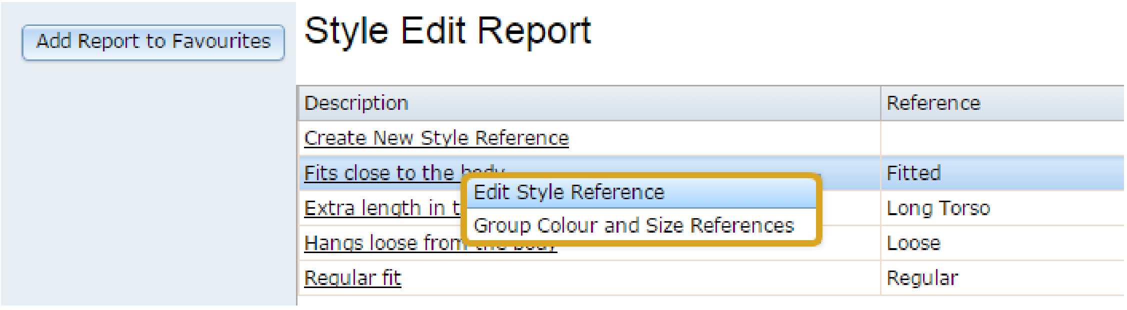

The Style Edit Report is displayed.




| Description | Reference |
|---|---|
| Create New Style Reference | |
| Fits close to the body | Fitted |
| Extra length in the torso | Long Torso |
| Hangs loose from the body | Loose |
| Regular fit | Regular |

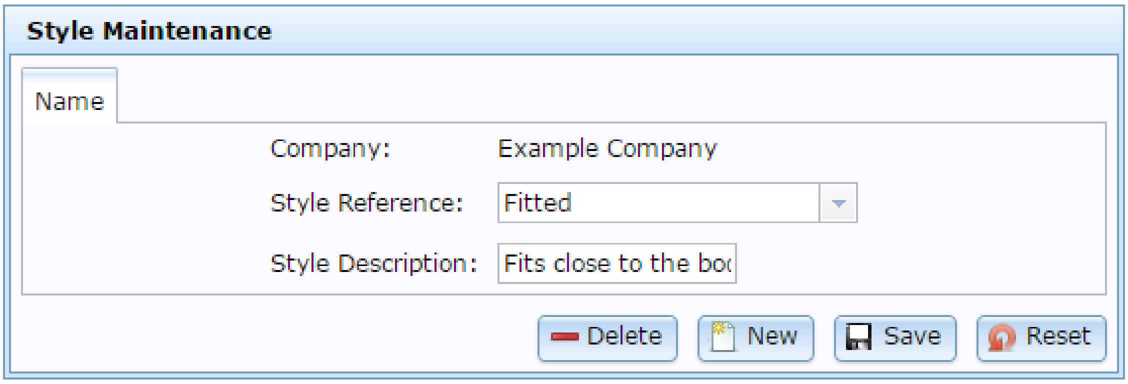
3. Press the description of the style you want to edit.

A popup menu is displayed.




4. Press Edit Style Reference.

   The Style Maintenance screen is displayed.




5. Type the new information into the fields.
6. Press .

   The style is saved.

# Linking colours and sizes to styles

Link sizes and colours to styles in order to select them for item variations. Each style can have a specific size and colour selection enabled, and colours and sizes can be enabled for several different styles.

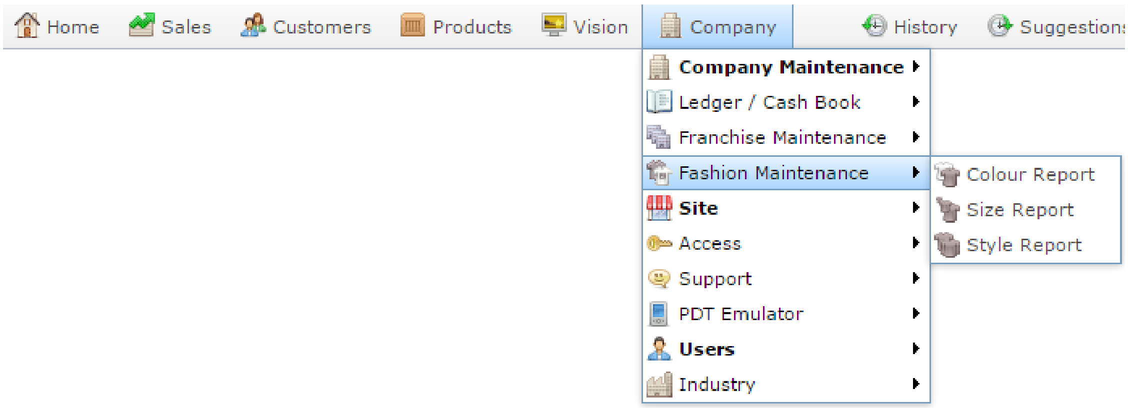
Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company* on page 186.

> **Note:** Colour and size are applied independently within a style. You cannot restrict colours to particular sizes only within a style, or vice versa.

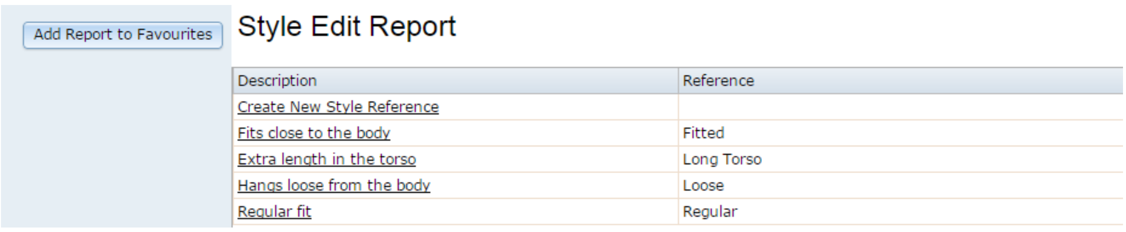
To link a colour or size to a style:

1. Press 

in the main menu bar.
2. Press Fashion Maintenance > Style Report.



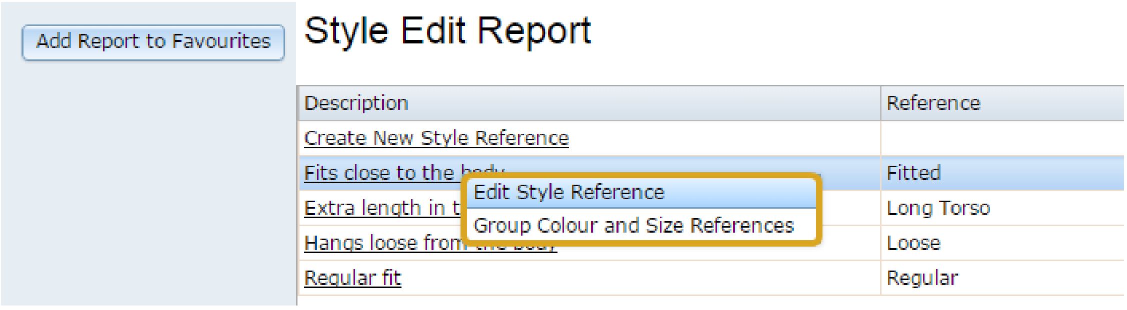

The Style Edit Report is displayed.




| Description | Reference |
|---|---|
| Create New Style Reference | |
| Fits close to the body | Fitted |
| Extra length in the torso | Long Torso |
| Hangs loose from the body | Loose |
| Regular fit | Regular |

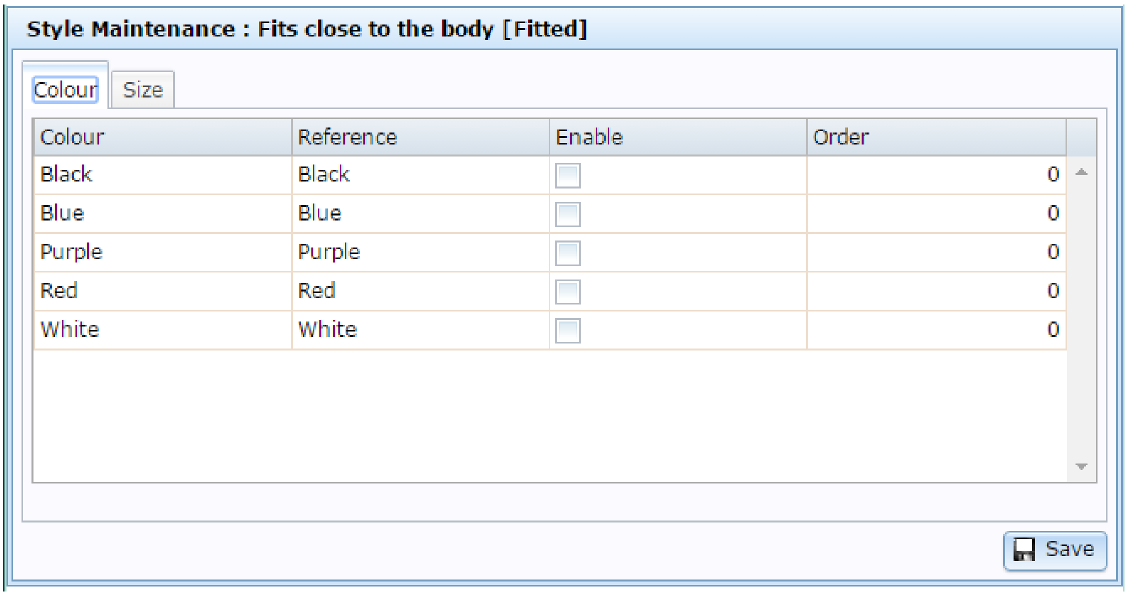
3. Press the description of the style you want to link sizes and colours to.

A popup menu is displayed.



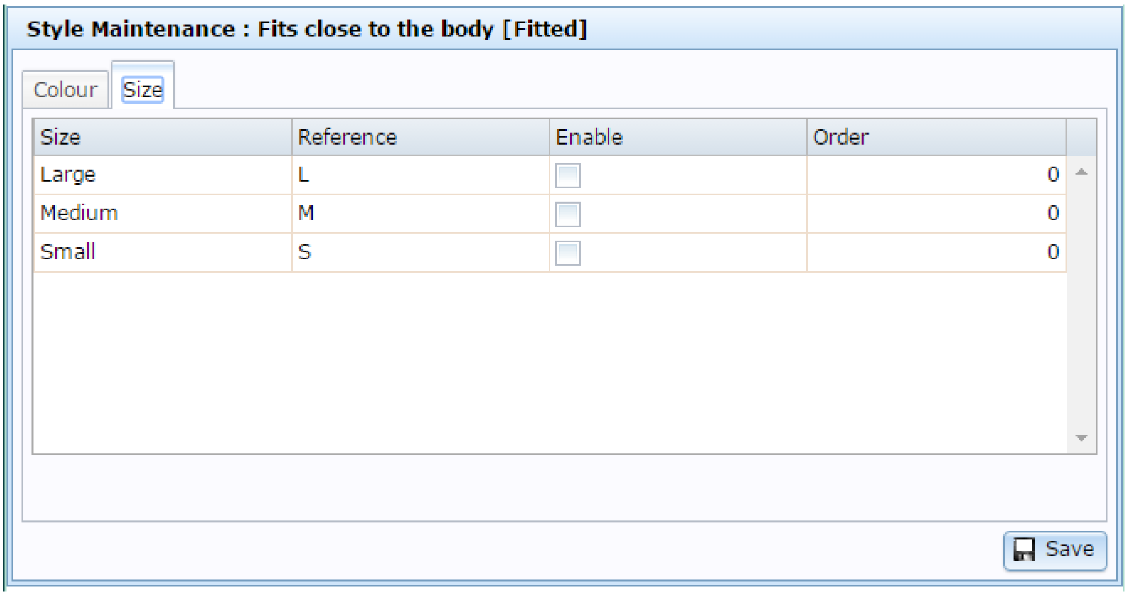

4. Press Group Colour and Size References.

   The Colour tab of the Style Maintenance(Style) screen is displayed.




5. Press the Enable field for each colour you want to be available for this style.
6. Press the Size tab.

   The Size tab of the Style Maintenance (Style) screen is displayed.




7. Press the Enable field for each size you want to be available for this size.

8. Press 

.

   The style selections are saved.

# Style Edit report

Use the Style Edit report to create styles for use as item variations.

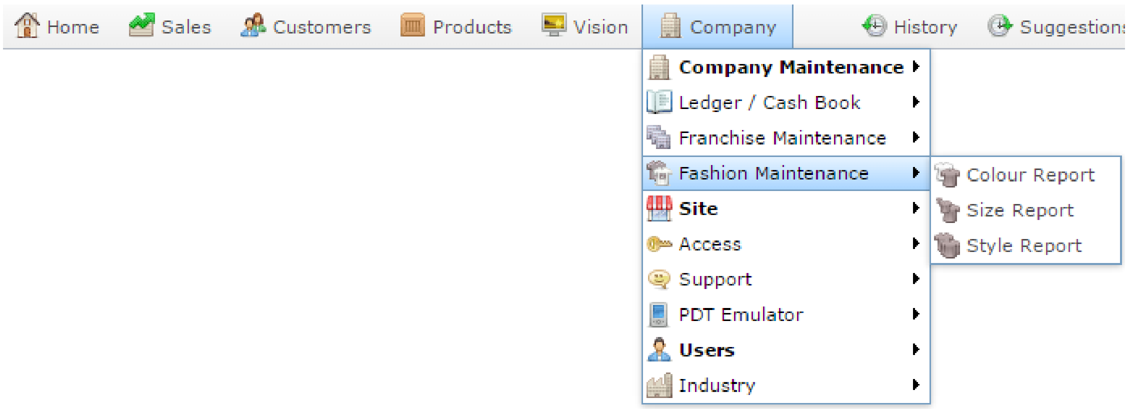
> **Note:** If you are looking for the screen that allows you to enable colours and sizes for styles, see *Style Maintenance (styles) screen* on page 221.

## Opening the Style Edit report

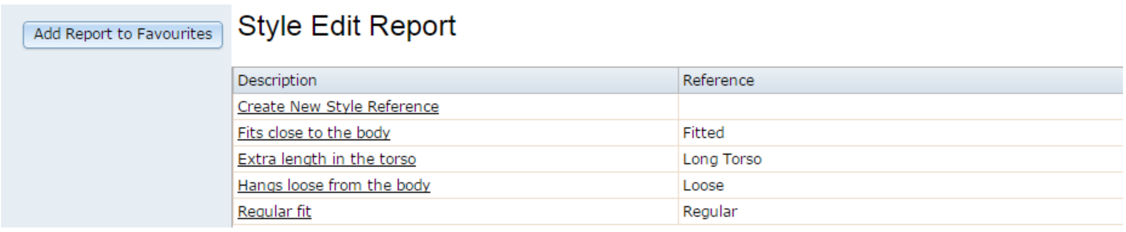
To open the Style Edit report:

1. Press  in the main menu bar.

2. Press Fashion Maintenance > Style Report.




The Style Edit Report is displayed.



## Style Edit report key fields and buttons

| Field | Description |
|---|---|
| Add Report to Favourites | Press to add this report to your Portal favourites for easier access. |
| **Create New Style Reference** | Press to create a new style.<br>See *Creating a style* on page 209. |
| **Description** | The description of the existing style. Press to open the style.<br>See *Editing a style* on page 211. |
| **Reference** | The name of the style. |

# Style Maintenance screen

Use the Style Maintenance screen to create styles for use as item variations.

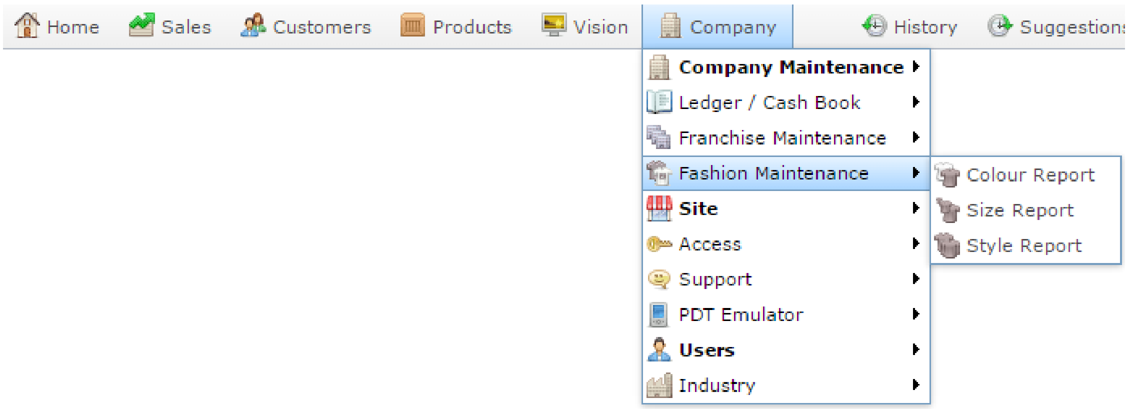
> **Note:** If you are looking for the screen that allows you to enable colours and sizes for styles, see *Style Maintenance (styles) screen* on page 221.

## Opening the Style Maintenance screen

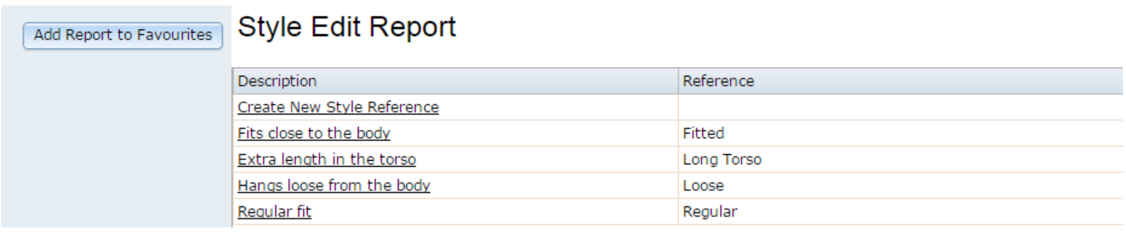
To open the Style Maintenance screen:

1. Press 

in the main menu bar.
2. Press Fashion Maintenance > Style Report.




The Style Edit Report is displayed.



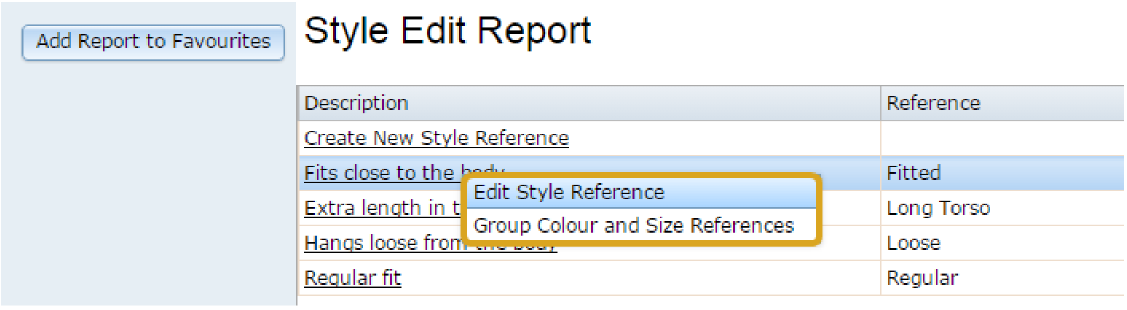
Add Report to Favourites

Style Edit Report

| Description | Reference |
|---|---|
| Create New Style Reference | |
| Fits close to the body | Fitted |
| Extra length in the torso | Long Torso |
| Hangs loose from the body | Loose |
| Regular fit | Regular |

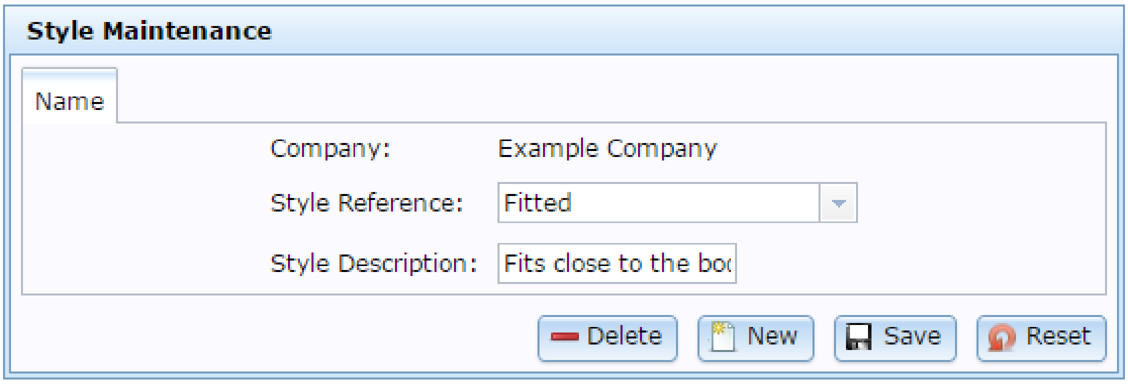
3. Press the description of the style you want to edit.

   A popup menu is displayed.




4. Press Edit Style Reference.

The Style Maintenance screen is displayed.



## Style Maintenance screen key fields and buttons

| Field | Description |
|---|---|
| **Company** | The company this style was created under. |
| **Style Reference** | The name of the style. |
| **Style Description** | A short description of the style. |
| Delete | Delete this style. |
| New | Create a new style.<br>See *Creating a style* on page 209. |
| Save | Save any changes to this style. |
| Reset | Revert any changes to this style since the last save. |

# Style Maintenance (styles) screen

Use the Style Maintenance (styles) screen to link sizes and colours to a style.

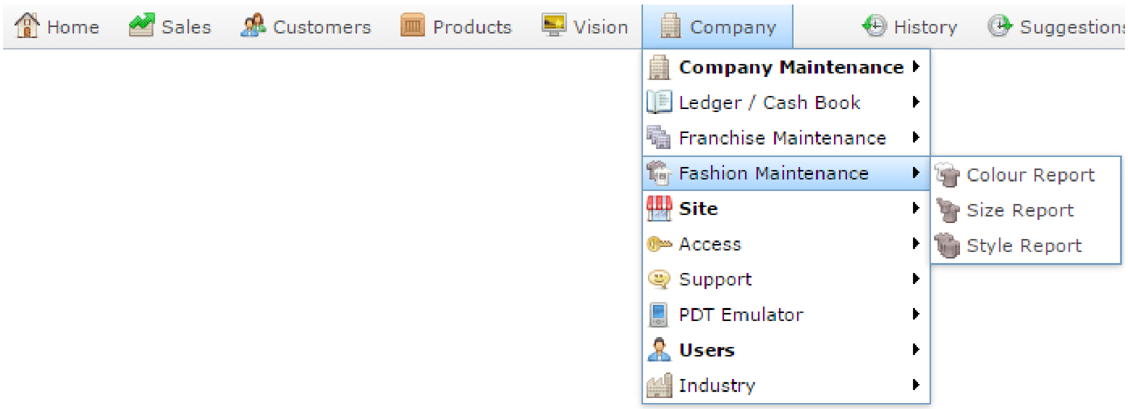
> **Note:** If you want to edit the style's name or description, see *Style Maintenance screen* on page 218.

## Opening the Style Maintenance (styles) screen

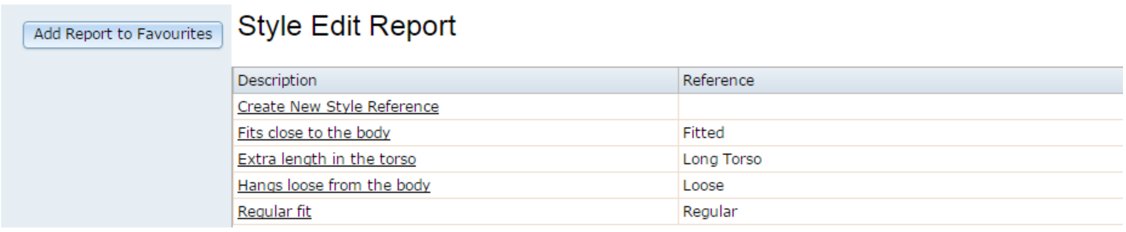
To open the Style Maintenance (styles) screen:

1. Press 

in the main menu bar.
2. Press Fashion Maintenance > Style Report.



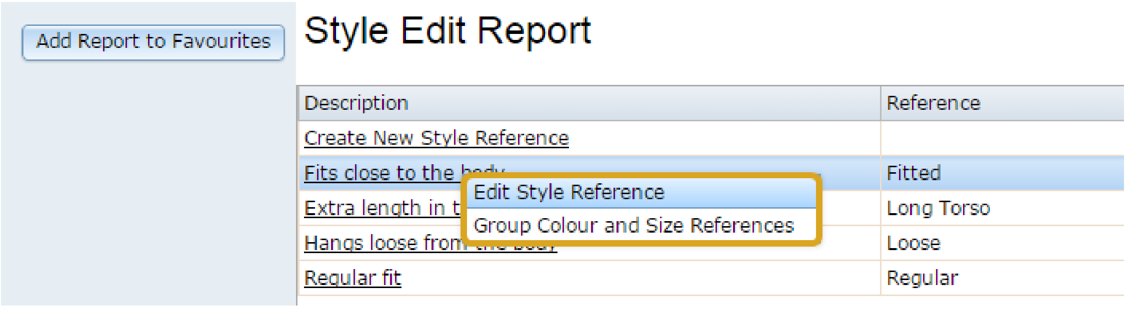

The Style Edit Report is displayed.




| Description | Reference |
|---|---|
| Create New Style Reference | |
| Fits close to the body | Fitted |
| Extra length in the torso | Long Torso |
| Hangs loose from the body | Loose |
| Regular fit | Regular |

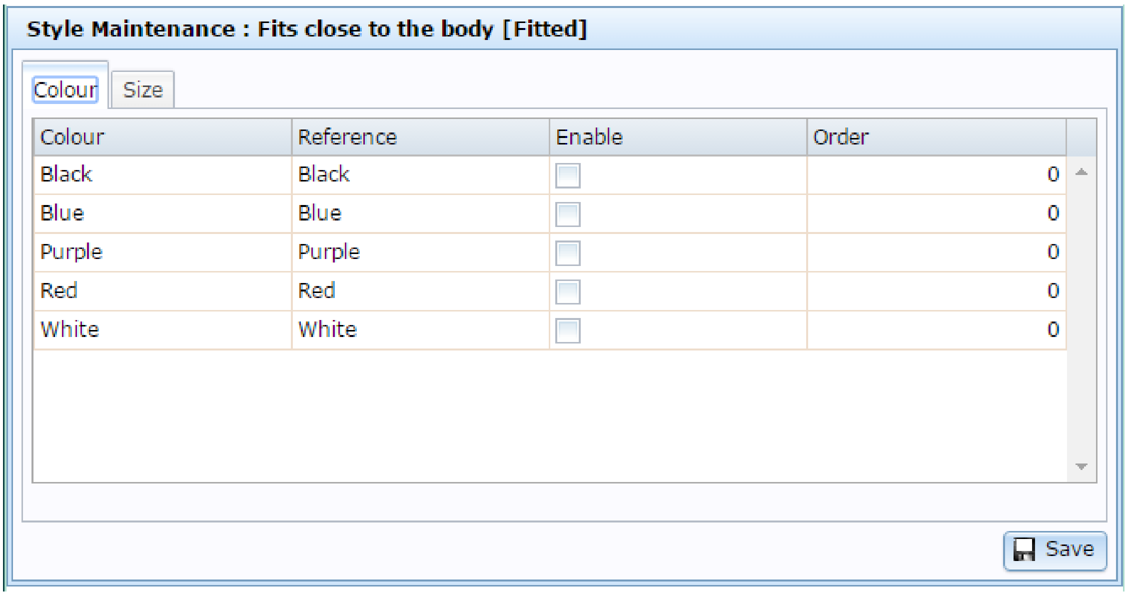
3. Press the description of the style you want to edit.

A popup menu is displayed.




4. Press Group Colour and Size References.

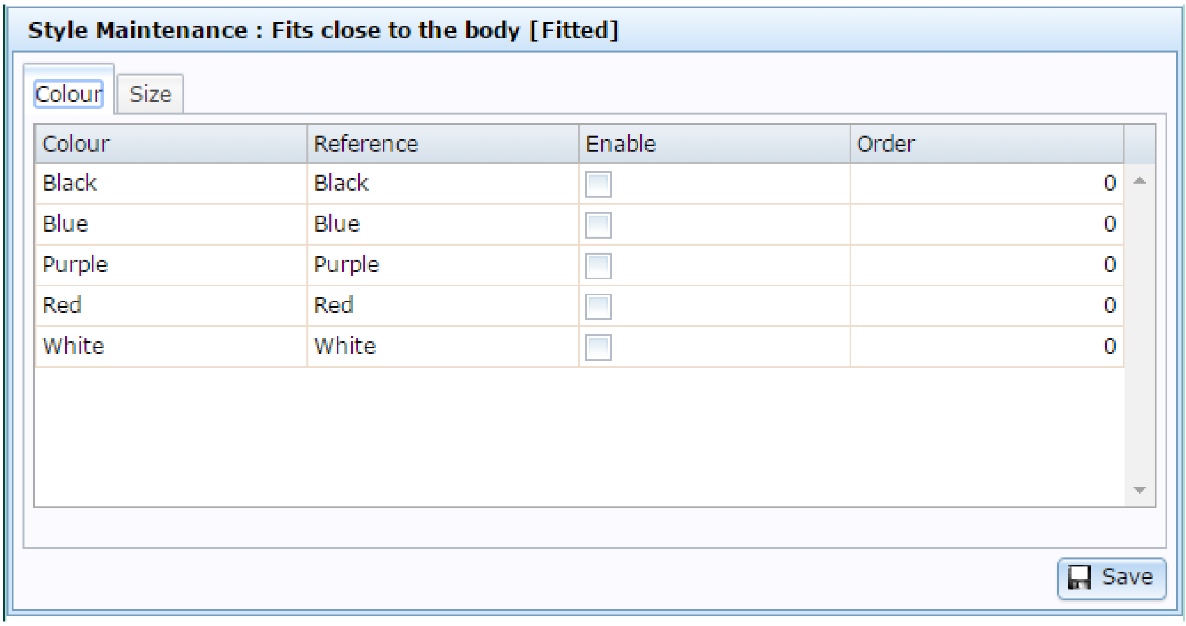
   The Style Maintenance (styles) screen is displayed.




# Style Maintenance (styles) scree key fields and buttonss

## Colour tab

Use this area to enable colours for this style.

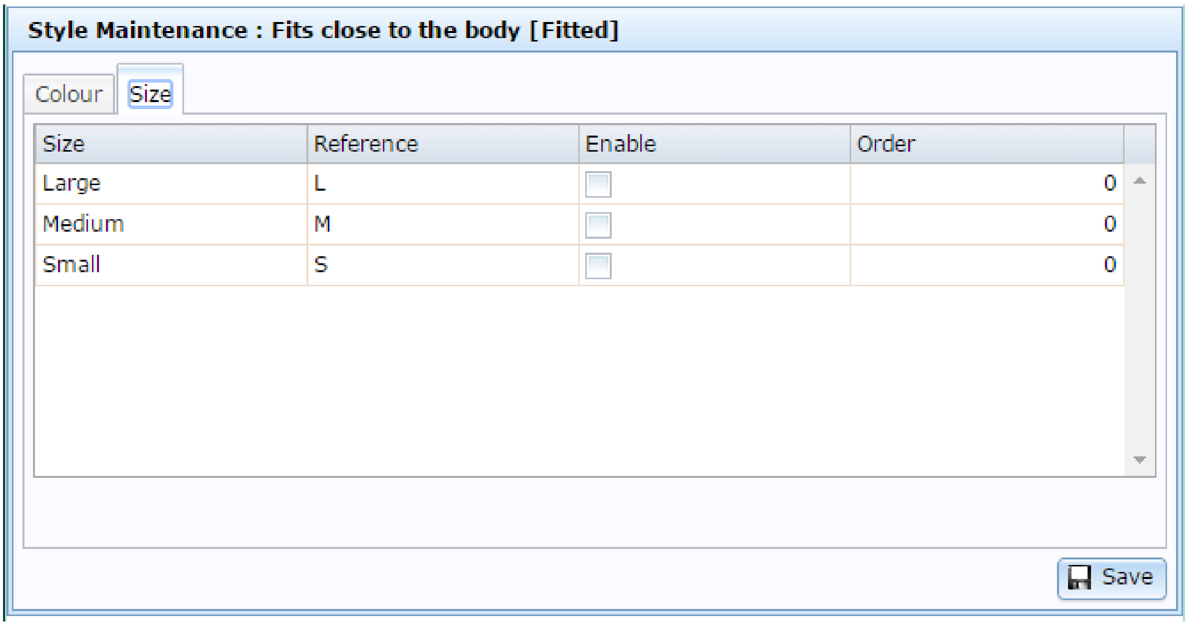



**Note:** You must create the colours before you can enable them. See *Create a colour* on page 188

| Field | Description |
|---|---|
| **Colour** | Name of the colour. |
| **Reference** | Reference or description of the colour. |
| **Enable** | Select to make this colour available in this style. |
| **Order** | Type an order for the colour to appear in drop-down lists and reports for this style. Lower numbers appear first. |
| Save | Save changes to the style. |

## Size tab

Use this area to enable sizes for this style.




**Note:** You must create the sizes before you can enable them. See *Creating a size* on page 197

| Field | Description |
|---|---|
| **Size** | Name of the size. |
| **Reference** | Reference or description of the size. |
| **Enable** | Select to make this size available in this style. |
| **Order** | Type an order for the size to appear in drop-down lists and reports for this style. Lower numbers appear first. |
|  | Save changes to the style. |

# Configuring additional information fields for your company

You can store custom information for each item in the Information tab of that item's Inventory Maintenance screen. The Portal uses a default set of labels, but you can define whatever labels best suits your needs. There are several text fields and a date field that you can customise to suit your inventory needs. When you customise these labels, all reports and maintenance screens use your chosen label.

> **Note:** These labels apply for all items in your inventory, and cannot be specified on a per-item basis. This documentation uses the default Portal labels.

To configure the additional information field labels, use the Artist area of Company Maintenance.

See *Configuring artist properties for your company* on page 32.

# Managing item types

You can use item types to categorise items however you like for reporting purposes.

## See:

- *Edit Item Type report* on page 231.
- *Item Type report*.
- *Item Type Maintenance screen* on page 237.

## What you can do:

- *Creating a new item type* on page 227.
- *Assigning an item to an item type*.
- *Editing an item type* on page 229.
- *Deleting an item type* on page 235.

# Creating a new item type

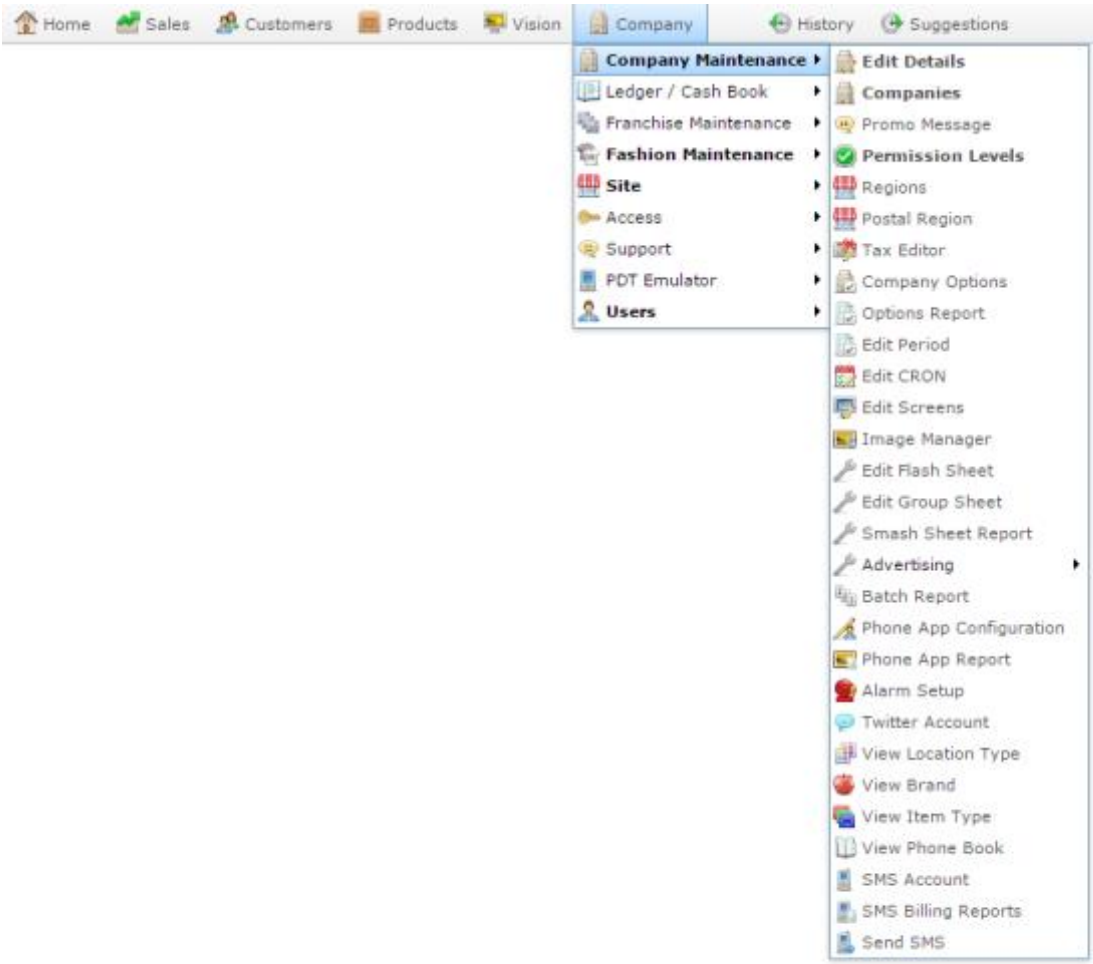
Create a new item type to categorise items for reporting purposes.

> **Note:** You can add items to this type by selecting the type in the **Item Type** field in the Stock Control tab of Item Maintenance. See *Assigning an item to an item type.*

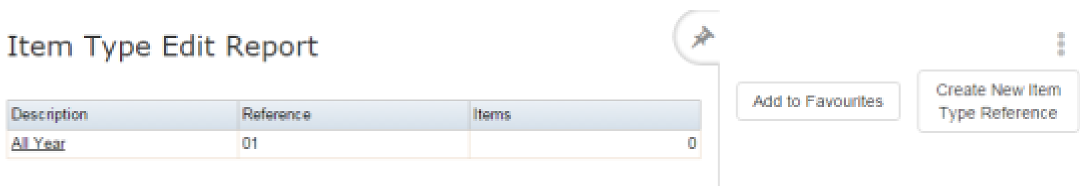
To create an item type:

1. Press 

.
2. Press Company Maintenance > View Item Type.



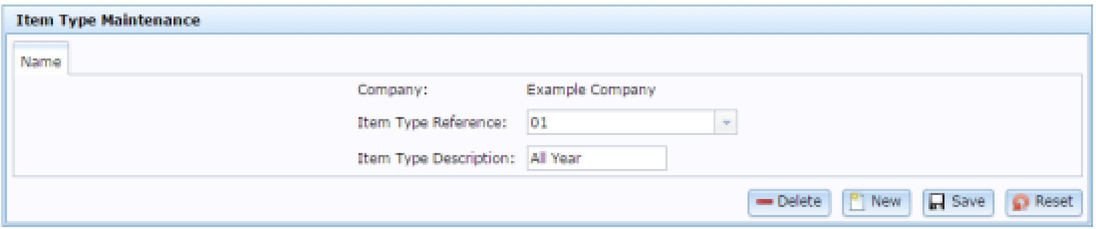

The Item Type Edit report is displayed.



3. Press 

.

   The Item Type Maintenance screen is displayed.




4. Type a unique code to identify the item type in the Item Type Reference field.
5. Type a description of the type in the Item Type Description field.
6. Press 

.

   The item type is created.

# Editing an item type

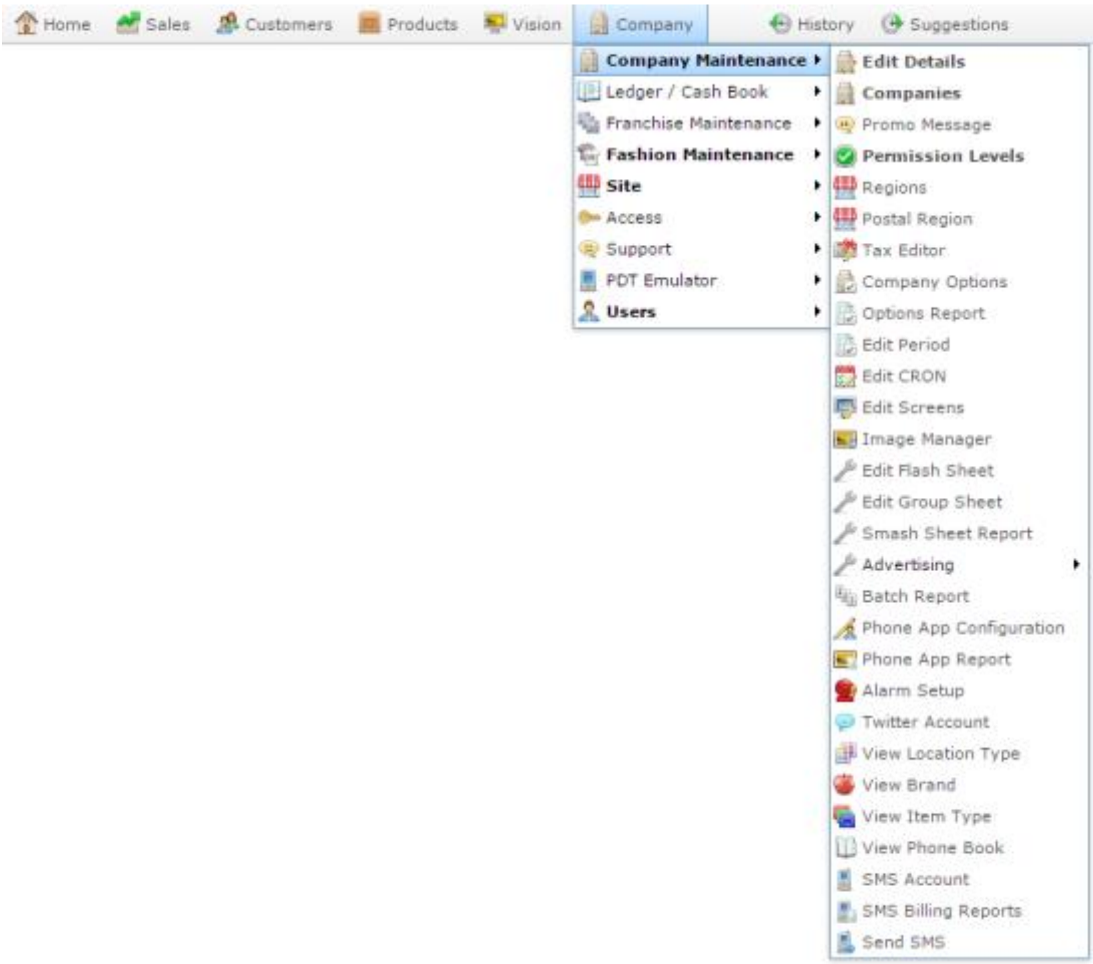
Edit an item type if you want to change the description.

> **Note:** You cannot add or remove items from this group by this method. To add or remove items, you must assign their Item Type field in the Stock Control tab of the item's Item Maintenance screen. See *Assigning an item to an item type*.

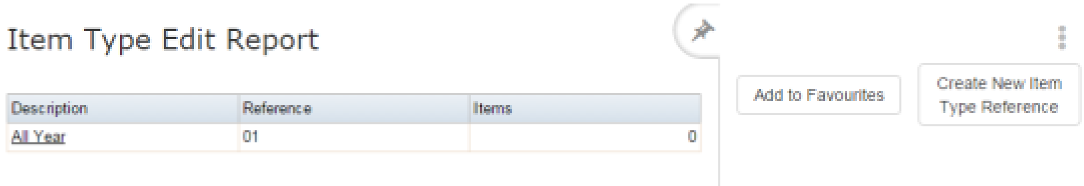
To edit an item type:

1. Press 

.
2. Press Company Maintenance > View Item Type.

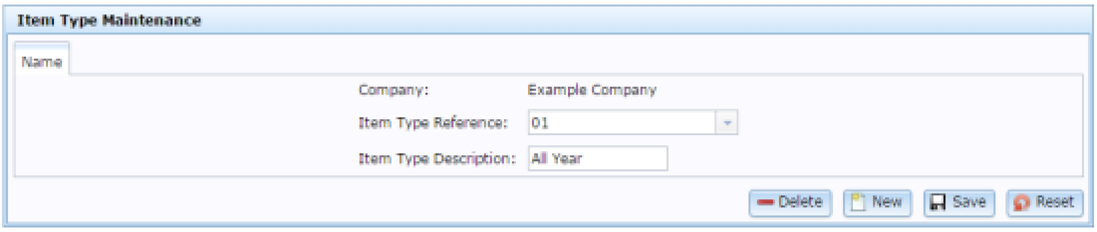



The Item Type Edit report is displayed.




3. Press the Description of the item type you want to edit.

   The Item Type Maintenance screen is displayed.




4. Edit the Item Type Description field.

> **Note:** You cannot change the **Item Type Reference** once the item type has been created.

5. Press 

.

   The item type is edited.

# Edit Item Type report

Use the Edit Item Type report to view and open item types for classifying inventory.

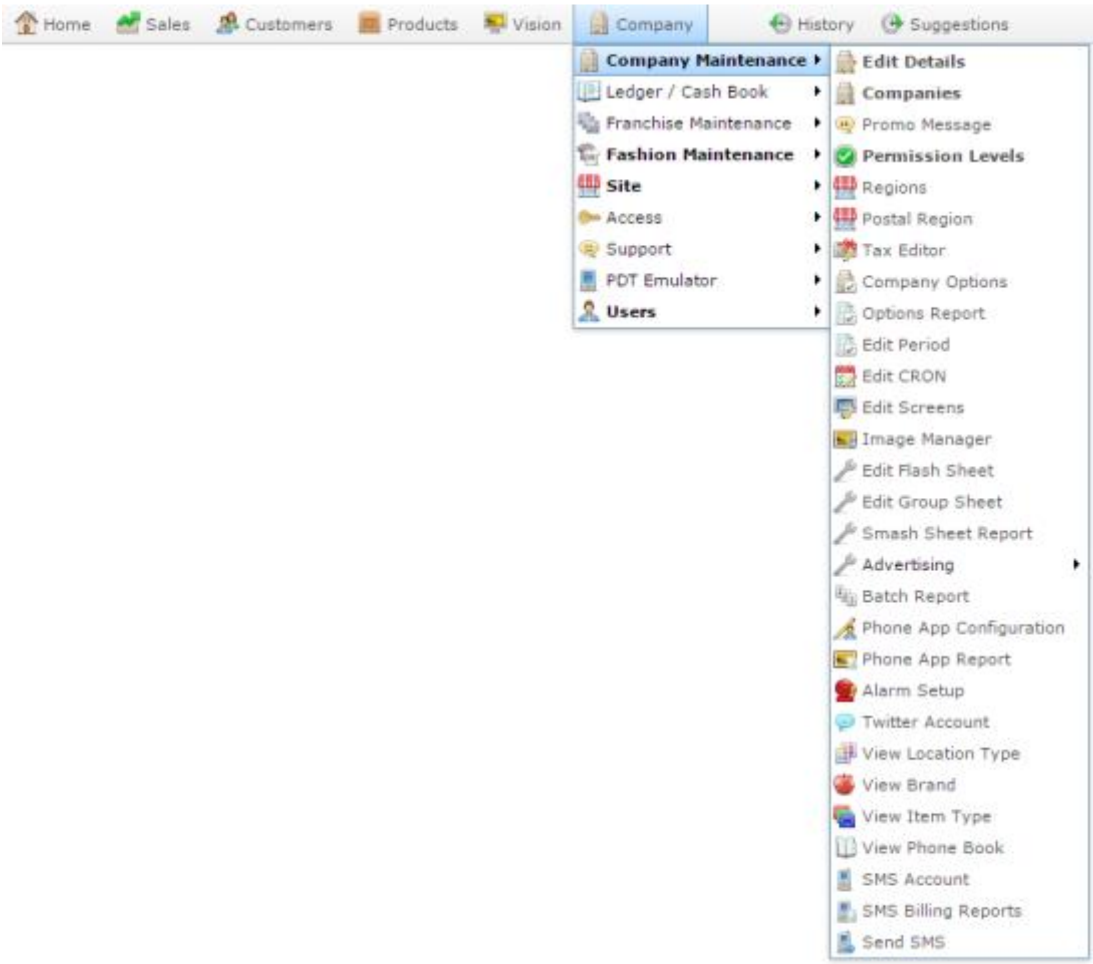
**Note:** This report does not show what items are assigned to each type. For this information, see *Item Type report*.

## Opening the Edit Item Type report

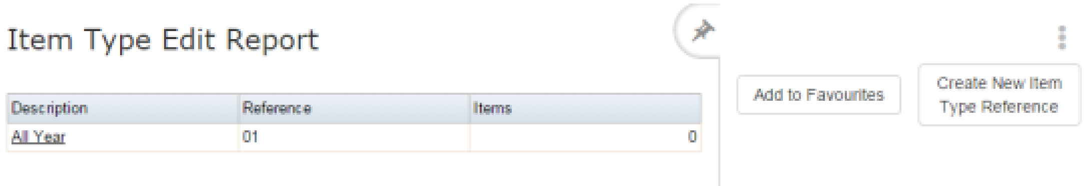
To open the Edit Item Type report:

1. Press 

.
2. Press Company Maintenance > View Item Type.




The Item Type Edit report is displayed.


Item Type Edit Report
Description
Reference
Items
All Year
01
0
Add to Favourites
Create New Item Type Reference

# Edit Item Type report key fields

## Filters area

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

| Field | Description |
|---|---|
| Add to Favourites | Press to add this report to your Portal favourites for easier access. |
| Create New Item Type Reference | Press to create a new item type. |

## Report area

This area displays report information.

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

| Field | Description |
|---|---|
| **Description** | Description of the item type.<br>Press to edit the item type. |
| **Reference** | Unique code identifying the item type. |
| **Items** | Number of items assigned to this item type. |

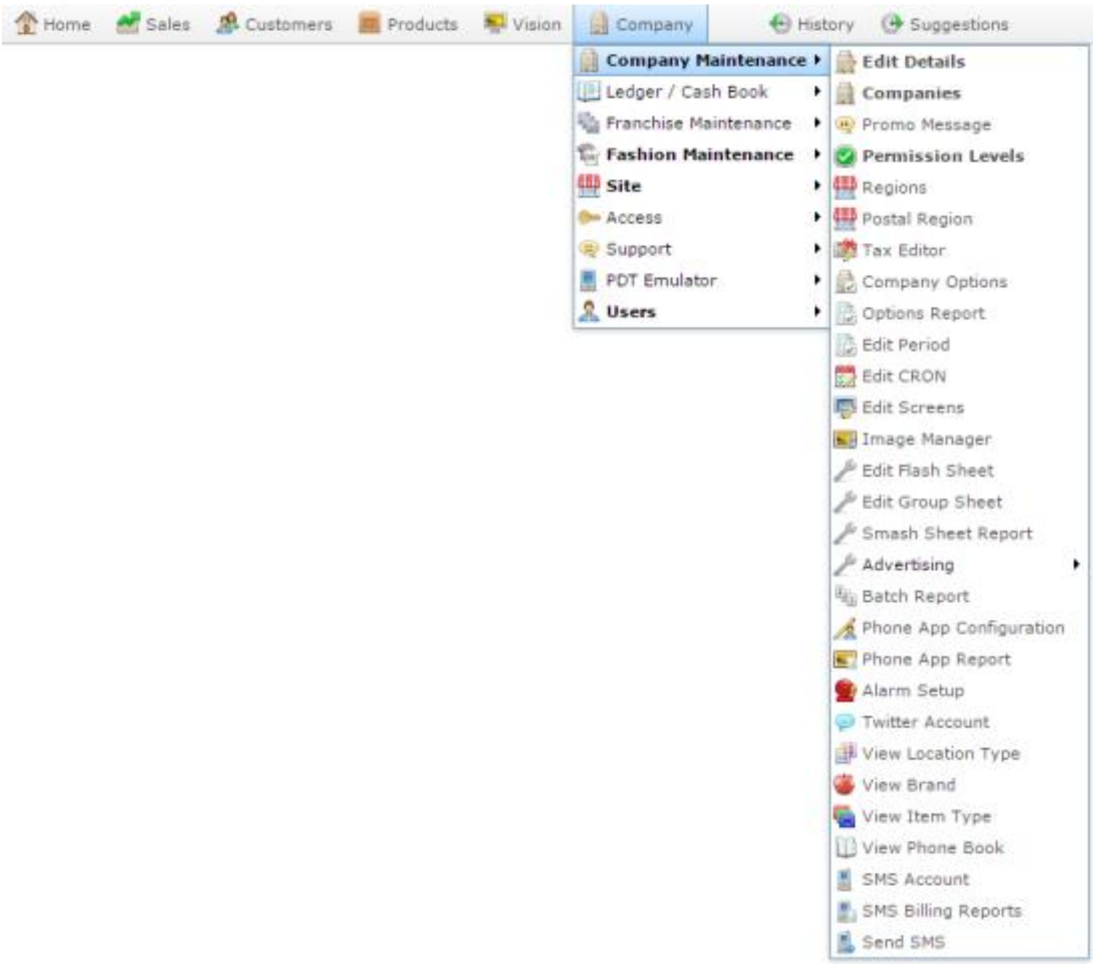
# Deleting an item type

Delete an item type if you want to remove the item category from your reporting.

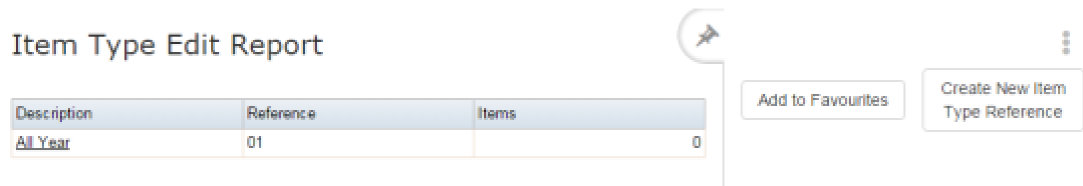
To delete the item type:

1. Press 

.
2. Press Company Maintenance > View Item Type.

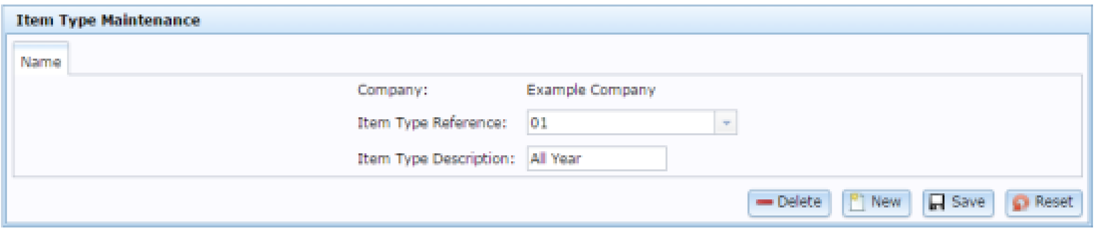



The Item Type Edit report is displayed.




3. Press the Description of the item type you want to delete.

The Item Type Maintenance screen is displayed.




4. Press Delete.

   The item type is deleted.

# Item Type Maintenance screen

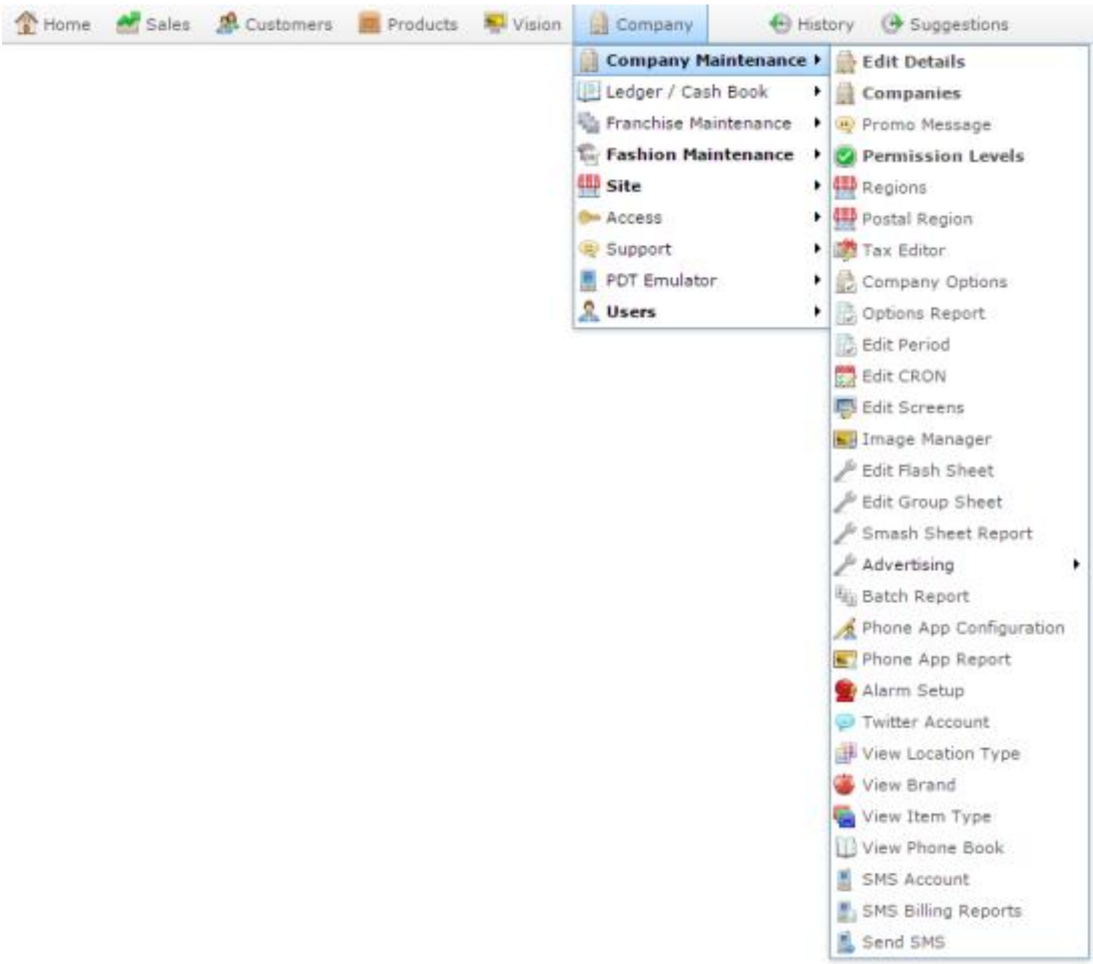
Use this screen to create, edit and delete item types for categorising your inventory.

## Opening the Item Type Maintenance screen

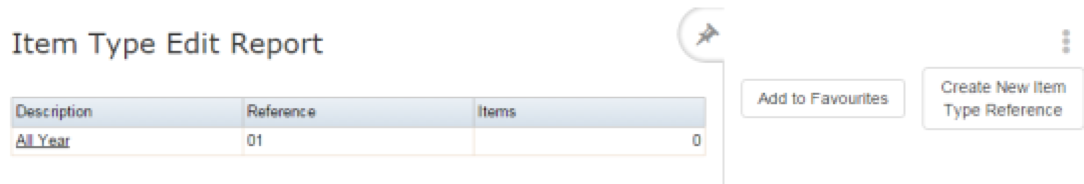
To open the Item Type Maintenance screen:

1. Press 

.
2. Press Company Maintenance > View Item Type.

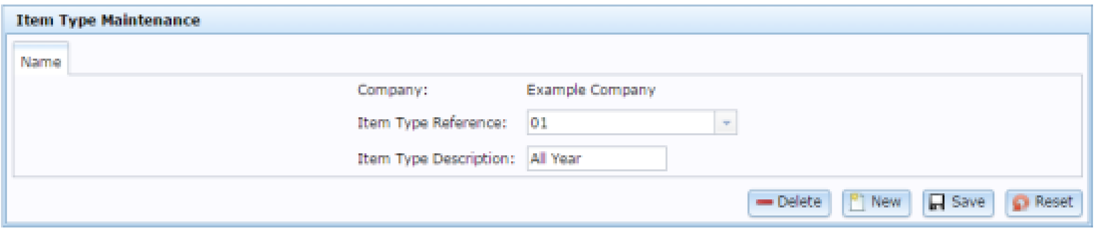



The Item Type Maintenance screen is displayed.




3. Press the Description of the item type you want to edit.

The Item Type Maintenance screen is displayed.



## Item Type Maintenance screen key fields and buttons

| Field | Description |
|---|---|
| **Company** | The company the item type relates to. |
| **Item Type Reference** | Unique code identifying the item type.<br>Select another item type to edit here. |
| **Item Type Description** | Description of the item type. |
| Delete | Press to delete the current item type. |
| New | Press to create a new item type. |
| Save | Press to save any changes made to the current item type. |
| Reset | Press to undo any changes made since the item type was last saved. |

# Glossary

### Account

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

### Advertising label

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

### Appointment (Scheduler)

An appointment is an entry for a customer in the Scheduler that represents one or more specific services scheduled at a particular time for the customer. It can be retrieved by the Point of Sale and added to a transaction. Appointments can be rescheduled, cancelled or duplicated.

### Aged balance

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

### Balance

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

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

### Barcode

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

### Batch (kit manufacture)

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

### Batch (stock take)

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

### Brand

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

### Bonus loyalty points

Bonus loyalty points are additional loyalty points accrued for certain activities, such as purchasing particular items, or participating in a promotion. Bonus points are accrued in addition to regular loyalty points.

### Bulk discount

A bulk discount is a discount on the purchase price that is offered when a certain number of units or weight of an item is purchased in a single transaction. An item can have different discount amounts depending on the number or amount purchased.

### Company

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

### Complete Order

A customer order is complete when:

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

### Contract

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

### Controlled purchase order / Controlled requisition

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

### Cost matrix / price matrix

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

A price matrix can be:

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

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

### Credit adjustment

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

### Credit limit

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

### Credit note

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

### Creditor

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

### Creditor contract

A creditor contract is an agreement between your company and a creditor or supplier to supply a set quantity of an item at a set price for a set period of time.

### Creditor payment

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

### Cross-reference

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

## Colour

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

## Customer

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

A customer on the Portal is a person who has interacted with your company in some way: they may have signed up for a loyalty member, ordered items from your company, opened a debtor account, requested a quote or has some other kind of interaction that created a customer account with their details in the Portal system. A customer may also be a loyalty member, marketing member or a debtor.

## Debtor

A debtor is a customer who has been extended a line of credit by your organisation: they are allowed to owe a certain amount of money (up to their credit limit) to your organisation with the agreement the amount is paid off before a set period of time, which allows them to buy large quantities of goods, or buy items frequently and make payments at a later time. Customer orders that have not yet been collected or completed are not counted as "money owed". Customer accounts are separate from debtor accounts, and not all customers are debtors.

## Debtor balance

A debtor balance is the amount a debtor currently owes your organisation. This amount only includes finalised transactions that have been added to the debtor's account for future payment, and does not include orders that have not been completed or collected yet.

## Debtor contract

A debtor contract is an agreement between your company and a debtor, where they can purchase a set quantity of an item at a set price for a set period of time.

## Debit adjustment

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

## Delivery docket

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

### Department

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

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

### Department cost level

A department cost level is a rule used by the Portal to automatically calculate prices for items within a certain cost bracket, according to how much they cost. For example, items below $5 might be priced at 2 x cost. Items between $5 and $10 might be priced at 1.8 x cost.

### Department promotion

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

### Discount

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

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

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

Per-unit discounts can:

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

Per-line discounts can:

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

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

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

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

### Division

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

### DSD

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

### Employee

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

### Fashion

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

### Family card

A family card is a loyalty card that is linked to the loyalty cards of other customers who are immediate family members. Family cards may share loyalty points.

### Fixture

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

### Frequent shopper item

A frequent shopping item is an item that gives loyalty members additional loyalty rewards for purchasing it.

### Gambling machine

A gambling machine is a single, specific machine at a gambling venue, such as a slot machine.

### Gambling session

A gambling session is a period of continuous gambling.

### Gambling spin

A gambling spin is a single instance of betting, for example betting on one round of a slot machine.

### Gambling venue

A gambling venue is a place that provides gambling machines for customers to use. A venue may have multiple gambling machines.

### Global price change

A global price change is an instruction to change the price of an item in the future, either at a single site, or across several sites at the same time.

### Group promotion

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

### Group purchase order

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

### GSA card

A GSA (Gambler's Subtle Assist) card is a card that anonymously identifies a gambling customer to the Portal, and helps prevent problem gambling by allowing a customer to set limits to their gambling time, periods and amounts.

### Home delivery

Home delivery is a feature that allows customers to order their items online, over a phone or by mail, and have them delivered to their house.

### Interest rate

An interest rate dictates the amount of interest that is charged on overdue debts by your company.

### Inventory

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

### Invoice

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

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

### Inter-branch transfers (IBT)

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

### Item

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

- Barcode.

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

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

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

### Item group

An item group is a group of items created for reporting purposes. For example, items that are frequently sold in an impulse purchase fixture. Items can belong to multiple groups.

### Item label

An item label is a label with price and barcode information for that item. It is usually attached to each unit of the item, whereas a shelf label provides a single label to describe all units of that item on the shelf.

### Item options

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

### Item type

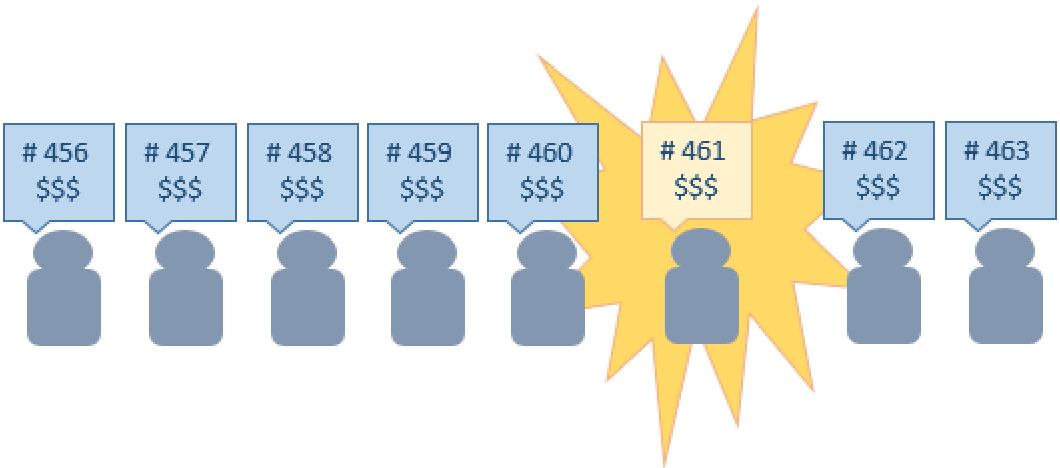
An item type is a way of categorising items for reporting purposes. Items can have only one type.

### Item variation

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

### Jackpot

A jackpot is a prize of loyalty points that accrue over a period from eligible transactions that are awarded to a randomly-selected transaction.




### Journal

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

### Kit

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

## Label

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

## Layby

A layby is a transaction where a customer commits to purchase a selection of items at a future date. The customer must pay the full balance by the due date or forfeit the items. The site commits to set the items aside for the customer, so they can be collected when the layby is paid in full. Depending on the company policy, laybys may incur additional setup fees, or require the customer to pay a minimum deposit when opening the layby.

Laybys can only be created and paid for through the Point of Sale, and can only be edited or cancelled on the Portal. Layby collection is not recorded.

## Loyalty

Loyalty is a system to encourage customers to return to your organisation. For example, by:

- Offering discounts on purchases.
- Offering exclusive promotions.
- Allocating points for each purchase that can be redeemed on future purchases.

Loyalty is configured for your organisation on the Portal.

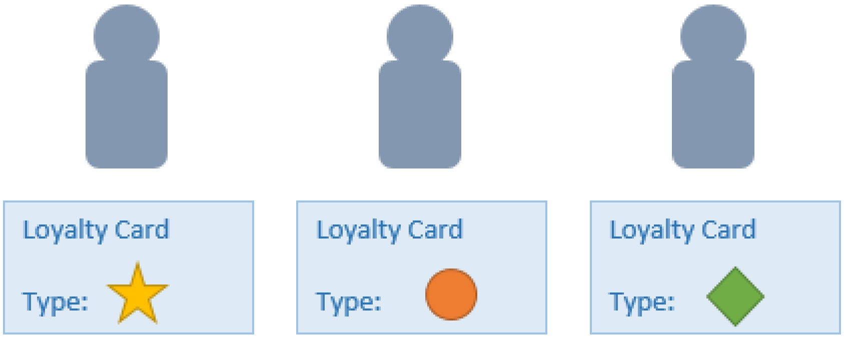
## Loyalty card

A loyalty card is a physical or electronic card that uniquely identifies a customer's loyalty account, and records:

- Contact information.
- Whether the customer wants to be notified of promotions, and which contact method to use.
- The customer's purchases on that card.
- The points balance, if your loyalty is configured to award points.

## Loyalty card type

A loyalty card type defines the rules of the loyalty card, such as how they accrue loyalty points, how points can be redeemed, and whether cards can be upgraded or downgraded to other types.

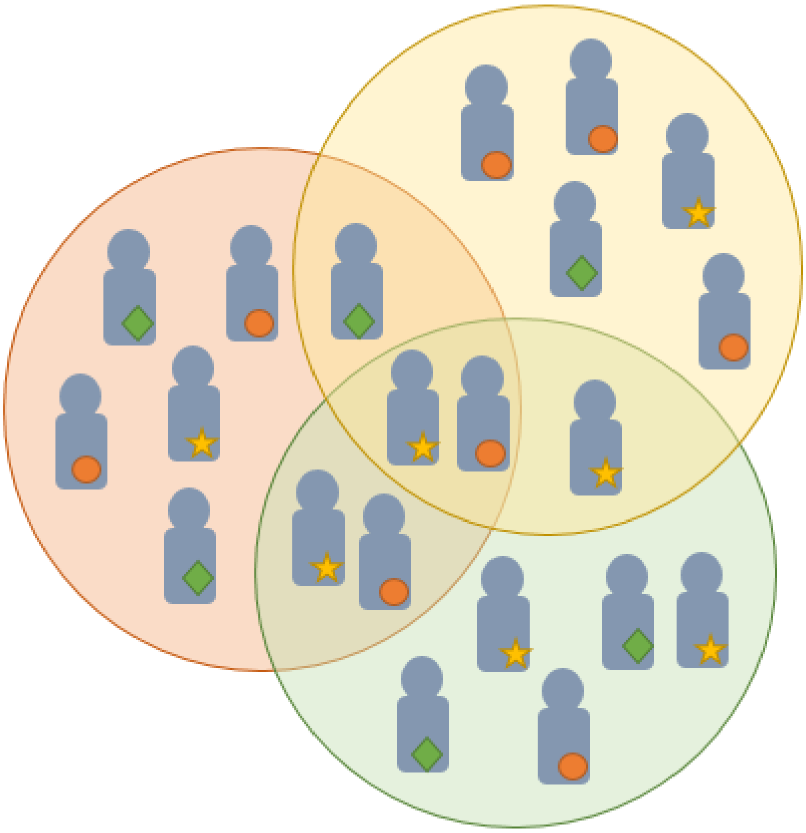



### Loyalty department

A loyalty department allows you to control how a department's items accrue loyalty points for customers who purchase them, and how points are redeemed on items in that department.

### Loyalty group

A loyalty group is a tool for categorising loyalty members to provide jackpots or rewards, or for reporting purposes. Loyalty members can belong to more than one group, and loyalty groups can contain loyalty members with different card types.



### Loyalty points

Loyalty points are accrued by loyalty members for purchasing your company's goods or services. The number of loyalty points a loyalty member receives from a purchase is controlled by the item, the loyalty card, loyalty departments and other settings. Loyalty points can be redeemed to purchase goods, or exchanged for vouchers.

### Loyalty voucher

A loyalty voucher is a voucher that can be used to purchase goods or services at your company. It is created by redeeming loyalty points for a specific value.

### Ledger

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

### Ledger type

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

### Line minimum

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

### Mail out

A mail out is a communication sent to your customers via email, SMS or postal mail, with marketing, survey, promotion or other information attached.

### Manufactured Kit

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

### Marketing member

A marketing member is a customer who has joined your marketing program to receive marketing information. They may or may not be a loyalty member or other customer: the marketing list is maintained separately from the loyalty and customer lists.

## Matching

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

## Menu area

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

## Modifier item

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

## Offer

An offer is a type of promotion that requires a coupon or code to be presented, and can be configured with a limit on the number redemptions allowed during a certain period. For example, instead of allowing 50% off to every customer, 50% off is only given to the customers who present the offer coupon, or only the first fifty customers who present the offer coupon each day.

## Open transaction

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

## Operator

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

## Pack

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

## Pallet

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

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

### Payment terms

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

### PDT

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

### PLU group

A Price Look Up (PLU) group is a way of categorising items for reporting.

### PLU Loyalty group

A loyalty Price Look Up (PLU) group provides special loyalty rewards to loyalty members when they purchase items in this PLU group.

### Portal Data Interchange (PDI)

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

### Permission

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

### Portal operator

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

### Point of Sale operator

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

### Point of Sale supervisor

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

### Point of Sale Transaction

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

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

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

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

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

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

### Price change

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

### Price level

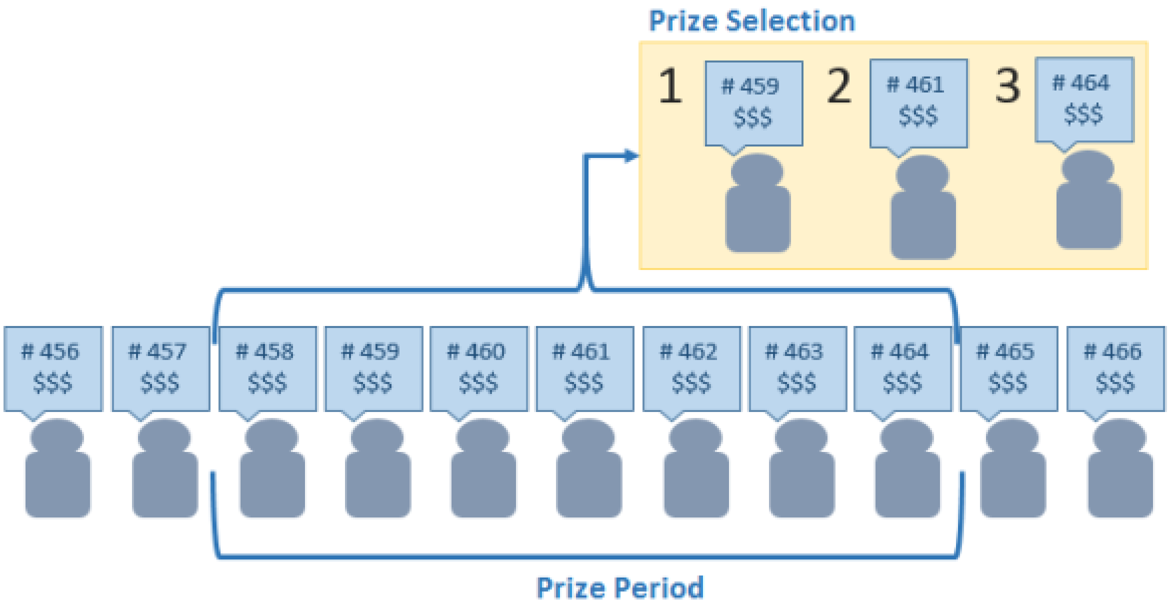
The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

### Prime item

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

## Prize

A prize is an award of loyalty points to one or more random transactions selected from all transactions in a specified period. For example, a prize may be awarded to three transactions every day.




## Procurement

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

## Promotion

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

## Promotion group

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

## Purchase order

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

### Quote

A quote is an offer for your company to provide a specified good or service to a potential customer for a specified price. A quote is usually only valid for a set period, after which it expires.

### Rebate

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

### Rebate group

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

### Rebate item group

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

### Receipt

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

### Referral

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

### Referred item

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

### Requisition

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

### Roster

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

### Sale minimum

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

### Scale label

A scale label is an item label for a packaged item sold by weight. It includes the item's weight and the price encoded into the barcode, so the packaged item can be scanned at the Point of Sale without having to be re-weighed.

### Selling item

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

### Size

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

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

### Shelf label

A shelf label is an item label designed to site on a shelf denoting the price and other information for the item, rather than attaching a label to each unit of the item.

### Snap count

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

### Special

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

### Statement

A statement is a record of a debtor or customer's balance, for which an invoice has already been issued.

### Stock adjustment / write-off

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

### Stock item

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

### Stock on hand

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

### Stock receipt

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

### Stock return

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

### Stock take

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

### Style

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

### Supplier

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

### Supplier promotion

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

### Survey

A survey is a series of questions posed to customers through marketing mail outs. You can use surveys to create filters for other mailouts or surveys.

### Table booking

A table booking is a customer request to be served at a particular table at a specified time, with a specified number of guests.

### Table section

A table section is a category of tables, used to differentiate areas of your restaurant on the PDT, and for reporting purposes.

### Table service

Table service is the act of serving food or beverages to your customers, either as a take-away service or dine-in service.

### Terminal (iZen Point of Sale)

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

### Tipping

Tipping is a means of engaging your customers by awarding points if they correctly predict which team will win in a series of games.

### Tipping game

A tipping game is a single game played between two teams at a tipping venue during a tipping round.

### Tipping group

A tipping group is an organisation or sport that supports tipping, such as Australian Rules Football (AFL).

### Tipping kiosk

A tipping kiosk is the terminal where tipping members select their game tips.

### Tipping round

A tipping round is a group of games that occur over the same period, such as all the games in a single weekend. Tipping rounds are defined by the organisation body that manages the sport.

### Tipping team

A tipping team is a player or group of players that perform as a single unit, such as a football team.

### Team venue

A tipping venue is a venue or area that a game is played at, such as a stadium.

### Transaction line (iZen Point of Sale)

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

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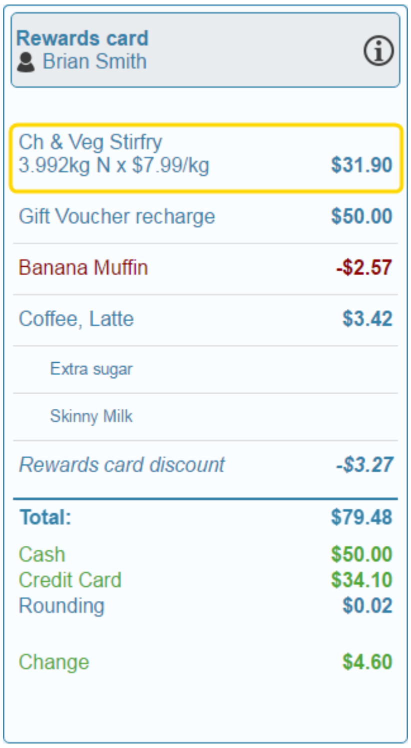


### User account

A user account is an account that allows a Portal or Point of Sale operator to log in and access features of the Portal or Point of Sale.

## Voucher

A voucher is a card or ticket preloaded with an amount that can be used to pay for purchases or services. Vouchers may or may not be rechargable, redeemable or require a fee or deposit, depending on the rules detailed in the voucher type.

## Voucher mask

A voucher mask defines the pattern that a voucher code must fit to be accepted as that voucher type. You can define the initial digits of the code, and the acceptable length. For example, you can define that gift vouchers must start with 213 and be 13 digits long. Any gift voucher that does not match this pattern is then rejected by the Portal.

## Voucher type

A voucher type is a set of rules that control how a voucher operates within your company, including the voucher mask, whether the voucher can be recharged, or requires a deposit amount. Voucher types can have sub-types that follow the same rules, but are differentiated for reporting reasons.

## Warehouse

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