



# Portal User Guide

## User Management and Rosters



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# Managing Portal user accounts

Manage Portal user accounts to control who can log in to your company on the Portal and what they can do.

**Note:** Portal user accounts can log into the Portal, but they cannot log into the Point of Sale. For more information on user accounts that can log into the Point of Sale, see *Managing point of sale user accounts* on page 37.

## Also see:

- *Portal User Maintenance screen* on page 20.
- *Portal User report* on page 32.

## What you can do:

- *Creating a portal user account* on page 3.
- *Finding a portal user account* on page 6.
- *Editing a portal user account* on page 8.
- *Editing a portal user account's password* on page 10.
- *Editing a portal user account's permissions* on page 13.
- *Suspending a portal user account* on page 16.
- *Deleting a portal user account* on page 18.

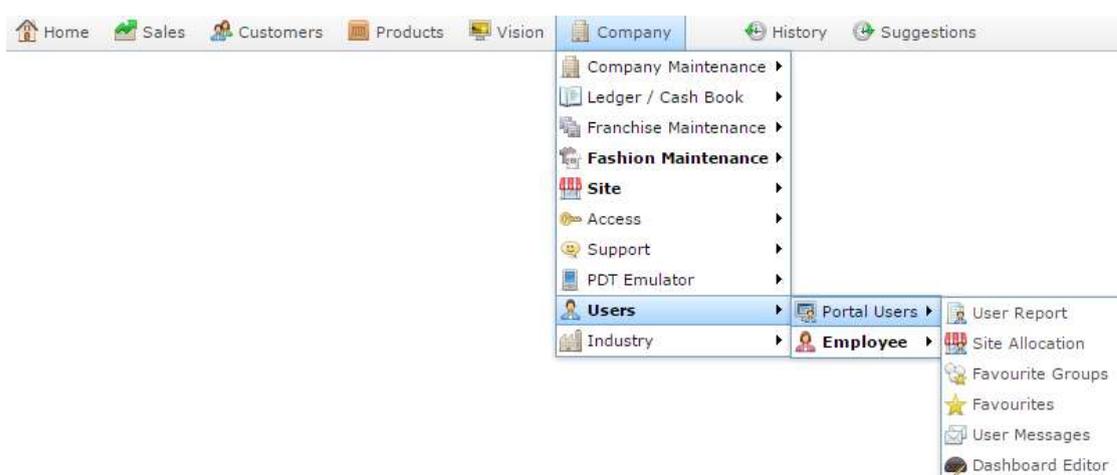
## Creating a portal user account

Create a Portal user account when you want a new person to be able to access your company in the Portal.

**Note:** Portal user accounts cannot log into the Point of Sale. See *Creating a point of sale user account* on page 38.

To create a new Portal user account:

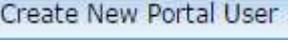
1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > User Report**.



The Portal User report is displayed



Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
Example	Sandra	Boyd		Master Admin	Full	✓	16/02/2015 11:14:39	14/11/2015	4/12/2014 15:40:03
bob	Bob	Bird		Master Admin		✓	22/05/2014 22:03:25	22/05/2017	17/02/2015 16:02:03

3. Press .
4. The Portal User Maintenance screen is displayed.

**Portal User Maintenance**

Login Name:

Name Security Restriction Services

First Name:  Surname:

Position:

Phone:  Fax:

Mobile:

Email:

Expiry Date:

Idle Logout:  (Minutes)

Language:

Menu Colour:

Menu Font:  Menu Size:

Menu Style:

User Enabled

5. Type the **Login Name** for the user account.

**Note:** The login name must be unique for your company.

6. Type the **First Name** and **Surname** of the new Portal user.
7. Press the Security tab.

The Security tab is displayed.

**Portal User Maintenance**

Login Name:

Name Security Restriction Services

User Type:

Report Access:

Permission Level:

Default Site:

Default Menu:

Default Login Screen:

Show Statistics:

Number Of Horizontal Groups:

Your Password:

User Password:

8. Type your administrator password in the **Your Password** field.
9. Type the new user account password in the **User Password** field.

The screenshot shows a web application window titled "Portal User Maintenance". At the top, there is a "Login Name" field with the value "Example". Below this are three tabs: "Name", "Security", "Restriction", and "Services". The "Security" tab is selected. The form contains several fields and controls:

- User Type: Master Administrator (dropdown)
- Report Access: All (dropdown)
- Permission Level: Full (dropdown)
- Default Site: Chadstone (dropdown)
- Default Menu: Company Default (dropdown)
- Default Login Screen: Company URL (dropdown)
- Show Statistics:
- Number Of Horizontal Groups: 3 (dropdown)
- Your Password: [text input field]
- User Password: [text input field]

The "Your Password" and "User Password" fields are highlighted with a yellow border. At the bottom right of the form, there are three buttons: "Save", "New", and "Delete".

10. Press  Save.

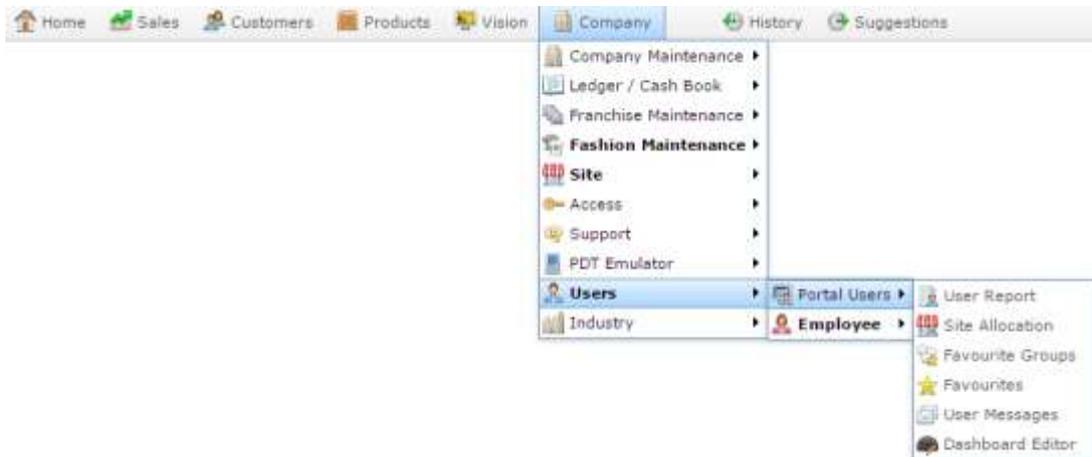
The new account is created.

## Finding a portal user account

Find a Portal user account when you want to view or edit the account details, including the password, or suspend or delete the account.

To find a Portal user account:

1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > User Report**.



The Portal User report is displayed



Portal User Report - Example Company

Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
<a href="#">Example</a>	Sandra	Boyd		Master Admin	Full	✓	16/02/2014 11:14:39	14/11/2016	4/12/2014 15:40:03
<a href="#">bob</a>	Bob	Bird		Master Admin		✓	22/05/2014 22:03:25	22/05/2017	17/02/2015 16:02:03

3. Press the **Login** of the user account you want to open.

The Portal User Maintenance screen is displayed.

**Portal User Maintenance**

Login Name:

**Name** | Security | Restriction | Services

First Name:  Surname:

Position:

Phone:  Fax:

Mobile:

Email:

Last Update: 16/02/2015

Expiry Date:

Idle Logout:  (Minutes)

Language:

Menu Colour:

Menu Font:  Menu Size:

Menu Style:

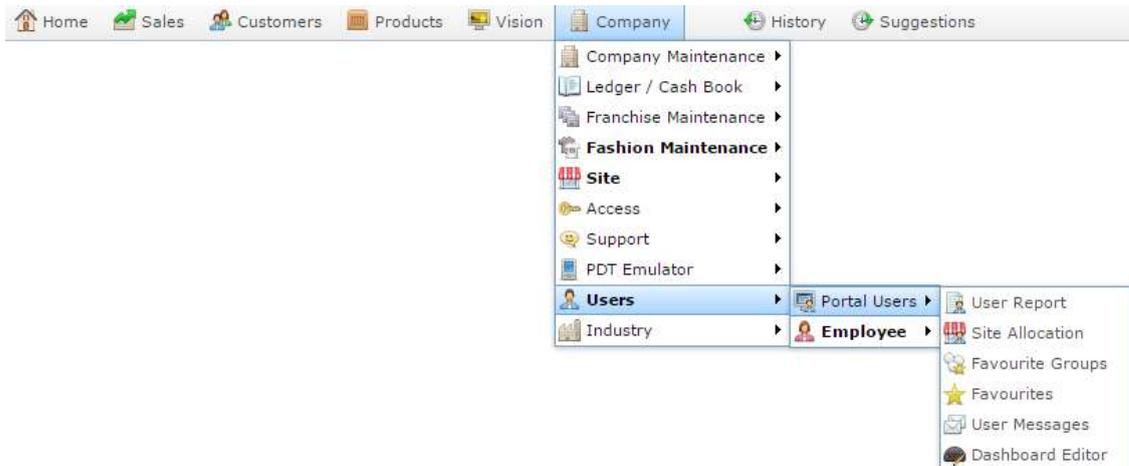
User Enabled

## Editing a portal user account

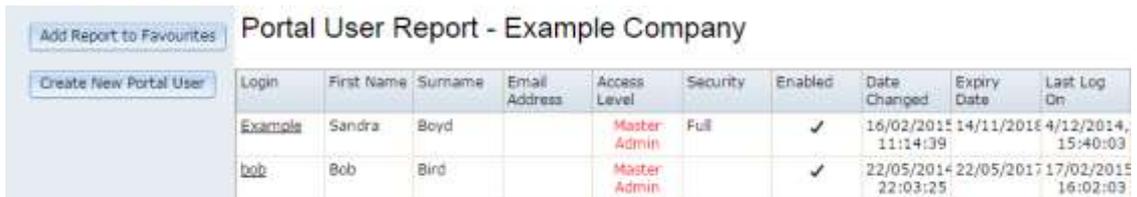
Edit a Portal user account if you want to make changes to the account details.

To edit a Portal user account:

1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > User Report**.



The Portal User report is displayed



The screenshot shows the 'Portal User Report - Example Company' screen. It features a table with columns for Login, First Name, Surname, Email Address, Access Level, Security, Enabled, Date Changed, Expiry Date, and Last Log On. There are also buttons for 'Add Report to Favourites' and 'Create New Portal User'.

Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
<a href="#">Example</a>	Sandra	Boyd		Master Admin	Full	✓	16/02/2014 11:14:39	14/11/2014	4/12/2014 15:40:03
<a href="#">bob</a>	Bob	Bird		Master Admin		✓	22/05/2014 22:03:25	22/05/2017	17/02/2015 16:02:03

3. Press the **Login** of the user account you want to open.

The Portal User Maintenance screen is displayed.

Portal User Maintenance

Login Name: Example

Name Security Restriction Services

First Name: Sandra Surname: Boyd

Position:

Phone: Fax:

Mobile:

Email:

Last Update: 16/02/2015

Expiry Date: 14/11/2018

Idle Logout: 30 (Minutes)

Language: Australian

Menu Colour: Top Menu

Menu Font: Verdana Menu Size: 10 px

Menu Style: Normal

User Enabled

Save New Delete

4. Make the edits as required.

See *Portal User Maintenance* screen on page 20.

5. Press  Save.

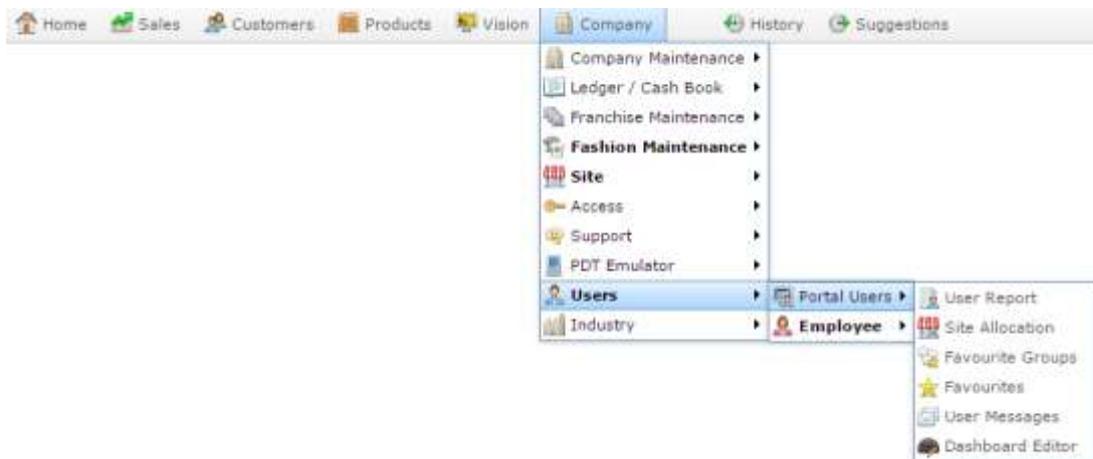
The Portal user account is edited.

## Editing a portal user account's password

Edit a Portal user account's password when they have forgotten it or are otherwise unable to update it themselves.

To edit a Portal user account's password:

1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > User Report**.



The Portal User report is displayed



Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
<a href="#">Example</a>	Sandra	Boyd		Master Admin	Full	✓	16/02/2014 11:14:39	14/11/2016	4/12/2014 15:40:03
<a href="#">bob</a>	Bob	Bird		Master Admin		✓	22/05/2014 22:03:25	22/05/2017	17/02/2015 16:02:03

3. Press the **Login** of the user account you want to open.

The Portal User Maintenance screen is displayed.

**Portal User Maintenance**

Login Name:

Name Security Restriction Services

First Name:  Surname:

Position:

Phone:  Fax:

Mobile:

Email:

Last Update: 16/02/2015

Expiry Date:

Idle Logout:  (Minutes)

Language:

Menu Colour:

Menu Font:  Menu Size:

Menu Style:

User Enabled

Save New Delete

4. Press the Security tab.
5. The Security tab is displayed.

**Portal User Maintenance**

Login Name:

Name Security Restriction Services

User Type:

Report Access:

Permission Level:

Default Site:

Default Menu:

Default Login Screen:

Show Statistics:

Number Of Horizontal Groups:

Your Password:

User Password:

Save New Delete

6. Type your administrator password in the **Your Password** field.
7. Type the new user account password in the **User Password** field.

The screenshot shows a web application window titled "Portal User Maintenance". At the top, there is a "Login Name" field containing the text "Example". Below this, there are three tabs: "Name", "Security", and "Services", with "Security" being the active tab. The main content area contains several configuration options, each with a label and a dropdown menu or checkbox:

- User Type: Master Administrator
- Report Access: All
- Permission Level: Full
- Default Site: Chadstone
- Default Menu: Company Default
- Default Login Screen: Company URL
- Show Statistics:
- Number Of Horizontal Groups: 3
- Your Password: [text input field]
- User Password: [text input field]

The "Your Password" and "User Password" fields are highlighted with a yellow border. At the bottom right of the window, there are three buttons: "Save", "New", and "Delete".

8. Press  Save.

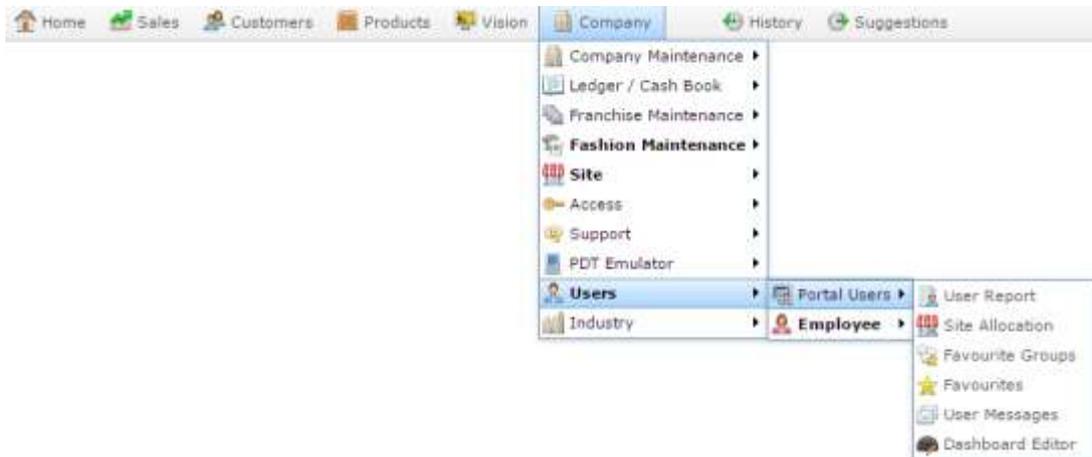
The Portal user account password is changed.

## Editing a portal user account's permissions

Edit a Portal user account's permissions when you want to change what areas or how much of the Portal they can access.

To edit a Portal user account's permissions:

1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > User Report**.



The Portal User report is displayed



Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
<a href="#">Example</a>	Sandra	Boyd		Master Admin	Full	✓	16/02/2014 11:14:39	14/11/2016	4/12/2014 15:40:03
<a href="#">bob</a>	Bob	Bird		Master Admin		✓	22/05/2014 22:03:25	22/05/2017	17/02/2015 16:02:03

3. Press the **Login** of the user account you want to open.

The Portal User Maintenance screen is displayed.

**Portal User Maintenance**

Login Name:

Name | Security | Restriction | Services

First Name:  Surname:

Position:

Phone:  Fax:

Mobile:

Email:

Last Update: 16/02/2015

Expiry Date:

Idle Logout:  (Minutes)

Language:

Menu Colour:

Menu Font:  Menu Size:

Menu Style:

User Enabled

Save New Delete

4. Press the Security tab.

The Security tab is displayed.

**Portal User Maintenance**

Login Name:

Name | Security | Restriction | Services

User Type:

Report Access:

Permission Level:

Default Site:

Default Menu:

Default Login Screen:

Show Statistics:

Number Of Horizontal Groups:

Your Password:

User Password:

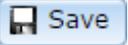
Save New Delete

To edit:

- The level of permissions the user account has within the Portal, select the level you want from the **User Type** drop-down list.

**Note:** You may not have permission to set a User Type above your own.

- The areas of reports the user account can access, select the area from the **Report Access** drop-down list.
- The areas of the Portal the user account can access, select the area from the **Permission Level** drop-down field.

5. Press .

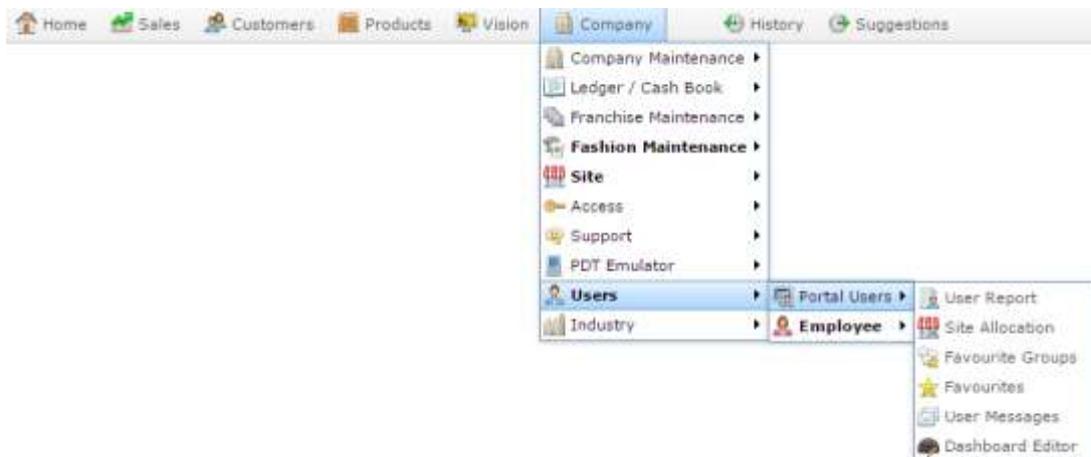
The Portal user account is edited.

## Suspending a portal user account

Suspend a Portal used account when you want to disable it so it can't be used, but you don't want to delete it.

To suspect a Portal used account:

1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > User Report**.



The Portal User report is displayed



The screenshot shows the 'Portal User Report - Example Company' screen. It features a table with columns for Login, First Name, Surname, Email Address, Access Level, Security, Enabled, Date Changed, Expiry Date, and Last Log On. There are two buttons on the left: 'Add Report to Favourites' and 'Create New Portal User'.

Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
<a href="#">Example</a>	Sandra	Boyd		Master Admin	Full	✓	16/02/2014 11:14:39	14/11/2016	4/12/2014 15:40:03
<a href="#">bob</a>	Bob	Bird		Master Admin		✓	22/05/2014 22:03:25	22/05/2017	17/02/2015 16:02:03

3. Press the **Login** of the user account you want to open.

The Portal User Maintenance screen is displayed.

**Portal User Maintenance**

Login Name:

**Name** | Security | Restriction | Services

First Name:  Sumame:

Position:

Phone:  Fax:

Mobile:

Email:

Last Update: 16/02/2015

Expiry Date:

Idle Logout:  (Minutes)

Language:

Menu Colour:

Menu Font:  Menu Size:

Menu Style:

User Enabled

4. Clear the **User Enabled** field.

**Portal User Maintenance**

Login Name:

**Name** | Security | Restriction | Services

First Name:  Sumame:

Position:

Phone:  Fax:

Mobile:

Email:

Last Update: 16/02/2015

Expiry Date:

Idle Logout:  (Minutes)

Language:

Menu Colour:

Menu Font:  Menu Size:

Menu Style:

User Enabled

5. Press .

The Portal user account is suspended.

## Deleting a portal user account

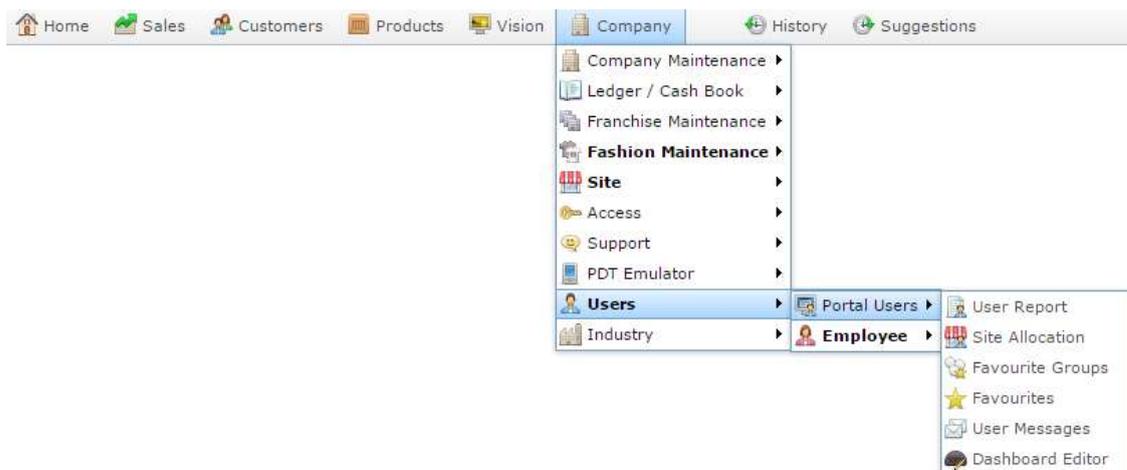
Delete a Portal user account when you want to remove it completely from the Portal.



**Important note:** Deleting users that have operated the Portal is not recommended, as it removes the audit trail for that user's actions within the Portal. You can suspend a user account without deleting it. Suspended user accounts cannot be used to log into the Portal. See *Suspending a portal user account* on page 16.

To delete a Portal user account:

1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > User Report**.



The Portal User report is displayed

Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
<a href="#">Example</a>	Sandra	Boyd		Master Admin	Full	✓	16/02/2014 11:14:39	14/11/2016	4/12/2014 15:40:03
<a href="#">bob</a>	Bob	Bird		Master Admin		✓	22/05/2014 22:03:25	22/05/2017	17/02/2015 16:02:03

3. Press the **Login** of the user account you want to open.

The Portal User Maintenance screen is displayed.

**Portal User Maintenance**

Login Name:

**Name** Security Restriction Services

First Name:  Surname:

Position:

Phone:  Fax:

Mobile:

Email:

Last Update: 16/02/2015

Expiry Date:

Idle Logout:  (Minutes)

Language:

Menu Colour:

Menu Font:  Menu Size:

Menu Style:

User Enabled

4. Press .

The Portal user account is deleted.

## Portal User Maintenance screen

Use the Portal User Maintenance screen to maintain portal user account details such as:

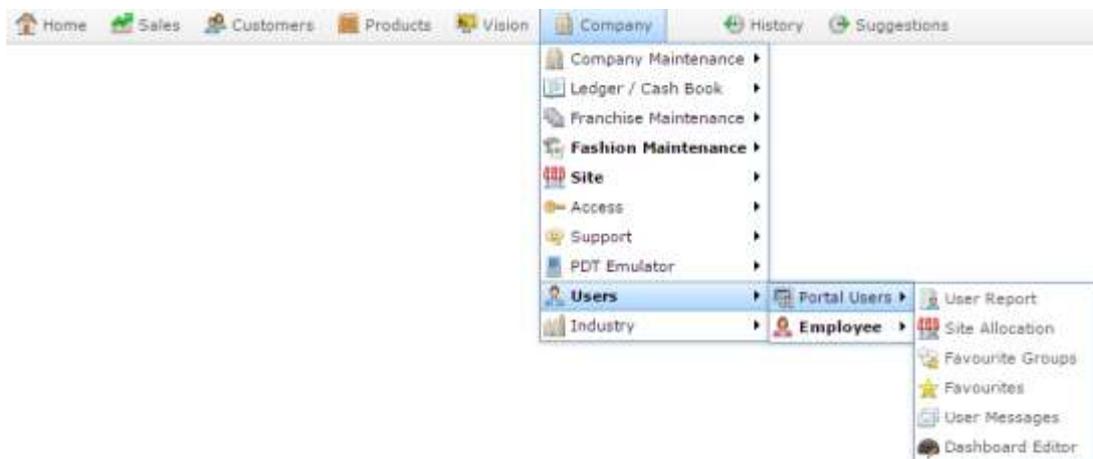
- Passwords.
- Security settings and access restrictions.
- Site defaults.
- Look and feel.

**Note:** Any changes to a Portal user account require a password from a user with a Company Administrator or higher user type.

## Opening the Portal User Maintenance screen

To open the Portal User Maintenance screen:

1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > User Report**.



The Portal User report is displayed



The screenshot shows the 'Portal User Report - Example Company' screen. On the left, there are two buttons: 'Add Report to Favourites' and 'Create New Portal User'. The main area contains a table with the following data:

Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
Example	Sandra	Boyd		Master Admin	Full	✓	16/02/2011 11:14:39	14/11/2016	4/12/2014 15:40:03
bob	Bob	Bird		Master Admin		✓	22/05/2014 22:03:25	22/05/2017	17/02/2015 16:02:03

3. Press the **Login** of the user account you want to open.

The Portal User Maintenance screen is displayed.

## Portal User Maintenance screen key fields and buttons

### All tabs

Field	Description
<b>Login Name</b>	The name used to log into the Portal.

## Name tab

Portal User Maintenance

Login Name: Example

Name Security Restriction Services

First Name: Sandra Surname: Boyd

Position:

Phone: Fax:

Mobile:

Email:

Last Update: 16/02/2015

Expiry Date: 14/11/2018

Idle Logout: 30 (Minutes)

Language: Australian

Menu Colour: Top Menu

Menu Font: Verdana Menu Size: 10 px

Menu Style: Normal

User Enabled

Save New Delete

Use this tab to maintain the user account details and preferences.

Field	Description
<b>First Name</b>	The user's first or given name.
<b>Surname</b>	The user's surname.
<b>Position</b>	The user's position within your company.
<b>Phone</b>	The user's phone number.
<b>Fax</b>	The user's fax number.
<b>Mobile</b>	The user's mobile phone number.

<b>Field</b>	<b>Description</b>
<b>Email</b>	The user's email address.
<b>Last Update</b>	The date this user account was last updated.
<b>Expiry Date</b>	The date this user account automatically expires.
<b>Idle Logout</b>	The number of minutes this user account can be inactive on the Portal before being automatically logged out.
<b>Language</b>	The language the Portal is displayed in for this account.
<b>Menu Colour</b>	Select the colour and position of the Portal main menu.
<b>Menu Font</b>	The font used for the Portal.
<b>Menu Size</b>	The height in pixels of the main Portal menu.
<b>Menu Style</b>	The text style of the main Portal menu: <ul style="list-style-type: none"> <li>▪ Regular or normal font.</li> <li>▪ Bold.</li> </ul>
<b>User Enabled</b>	Select to enable this user to access the Portal.

## Security tab

Use this tab to maintain the user account's:

- Permissions and security settings.
- Passwords.
- Default settings.

Field	Description
<b>User Type</b>	Select the level of access the user account has to the Portal.
<b>Master Administrator</b>	Full access to all levels of the Portal.
<b>Company Administrator</b>	Access to all functions and configurations within a single company.
<b>Company User</b>	Access to all functions within a company, but not to the company configuration or settings.

Field	Description
<b>Site Administrator</b>	Access to all functions and configurations within a single site.
<b>Supervisor</b>	Access to all functions within a site, but not the company or site configuration settings.
<b>User</b>	Access to a limited set of functions within a site.
<b>No Access</b>	No Portal access.
<b>Report Access</b>	Select which reports the user account has access to.
<b>All</b>	Access to all Portal reports.
<b>Inventory</b>	Access to all inventory reports.
<b>Frequent Shopper</b>	Access to the frequent shopper reports.
<b>Balance</b>	Access to the balance and financial reports.
<b>Sales</b>	Access to the point of sale reports.
<b>User</b>	Access to the user and employee reports.
<b>No Access</b>	No access to Portal reports.
<b>Permission Level</b>	Select the areas this user account has access to.
<p><b>Note:</b> The following permission levels are default areas. You can edit these permission levels or define your own using the Permission Levels option under Company Maintenance in the main</p>	

Field	Description
menu.	
<b>Cashup</b>	Access to the Point of Sale cashup reports, or allows an operator to perform cash-up on a PDT.
<b>Debtor</b>	Access to Debtor Maintenance.
<b>Debtor Invoicing</b>	Access to debtor invoicing.
<b>Debtor Statements</b>	Read-only access to debtor statements.
<b>Full</b>	Full access to all Portal systems.
<b>Full Debtors</b>	Full access to the debtor system.
<b>Full TRS</b>	Full access to the POSPORTAL Point of Sale.
<b>Inventory</b>	Access to Inventory Maintenance, procurement and suppliers.
<b>Loyalty</b>	Access to customer loyalty systems.
<b>No Access</b>	No Portal access.
<b>Read</b>	Read-only access to Portal reports, no ability to change data.
<b>Default Site</b>	Select the default site to be used for this user account.
	<b>Note:</b> This site is automatically selected for this user where relevant. The user may select to use other sites if their User Type

Field	Description
	has sufficient access levels.
<b>Default Menu</b>	<p>Select the default main menu area to be opened after logging in.</p> <p><b>Note:</b> This configuration is only used with side menus, and has no effect on other menu configurations.</p>
<b>Default Login Screen</b>	<p>Select which screen is displayed immediately after this user account logs into the Portal.</p> <p><b>Company URL</b>      A blank page with the menu bar.</p> <hr/> <p><b>Dashboard Buttons</b>      Show links to favourite reports as buttons.</p> <hr/> <p><b>Dashboard Reports</b>      Show links to favourite reports as links.</p> <hr/> <p><b>Favourite Reports</b>      View reports marked as favourite.</p>
<b>Show Statistics</b>	Display company statistics when first logging in to the Portal.
<b>Number of Horizontal Groups</b>	The number of groups to use when displaying grouped favourite reports.
<b>Your Password</b>	Type your password in to save changes to the user account.
<b>User Password</b>	<p>Type a new password in to change the user account's password.</p> <p><b>Note:</b> You do not need to type a password here to change the account details. Only type a password here to change the user</p>

---

<b>Field</b>	<b>Description</b>
	account password.

---

## Restriction tab

Name	Security	Restriction	Services
<input checked="" type="checkbox"/> Monday		Start: Midnight End: 11 PM	
<input checked="" type="checkbox"/> Tuesday		Start: Midnight End: 11 PM	
<input checked="" type="checkbox"/> Wednesday		Start: Midnight End: 11 PM	
<input checked="" type="checkbox"/> Thursday		Start: Midnight End: 11 PM	
<input checked="" type="checkbox"/> Friday		Start: Midnight End: 11 PM	
<input checked="" type="checkbox"/> Saturday		Start: Midnight End: 11 PM	
<input checked="" type="checkbox"/> Sunday		Start: Midnight End: 11 PM	

Restrict login with same IP address of the server

Save New Delete

Use this tab to maintain access restrictions to the Portal.

**Note:** Restrictions may not be enabled on your Portal configuration.

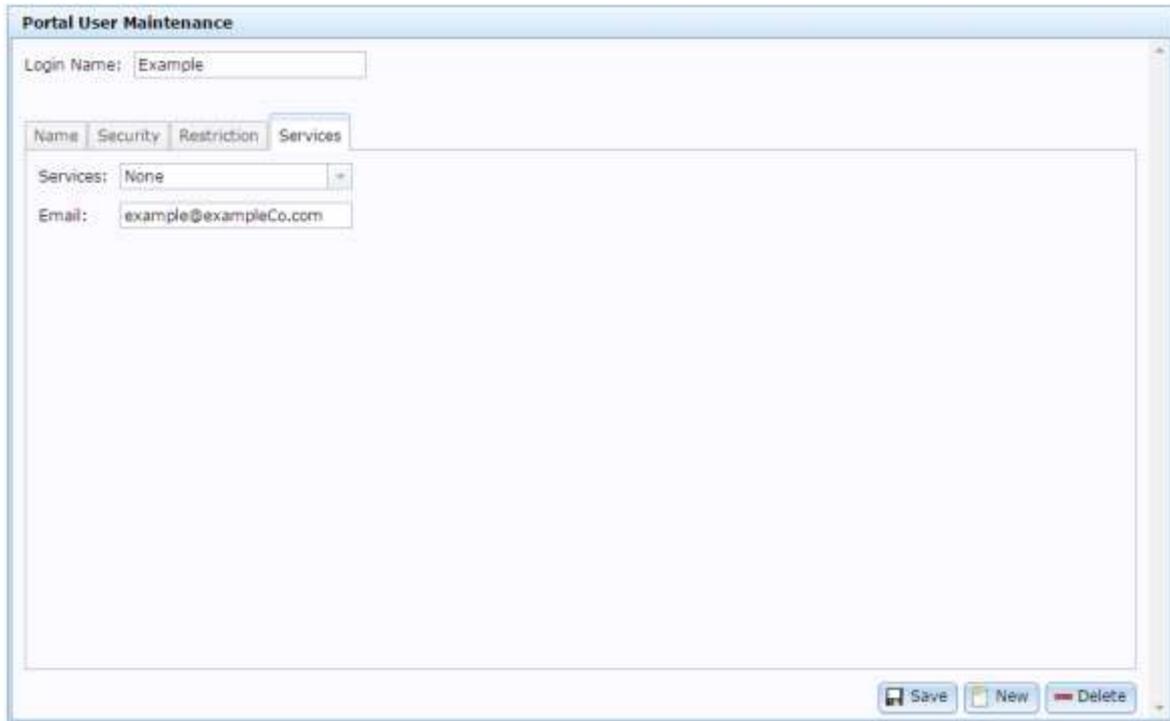
Field	Description
<b>Day of Week</b>	Select if the user account is permitted to log into the Portal on this day.
<b>Start</b>	Select the earliest time the user account is permitted to log into the Portal.
<b>End</b>	Select the latest time the user account is permitted to log into the Portal.
<b>Restrict login with same</b>	Select to only permit this user account to log in to the

---

<b>Field</b>	<b>Description</b>
<b>IP address of the server</b>	Portal from the same IP address as the Portal server itself.

---

## Services tab



Use this tab to maintain linked services to the user account and the account email.

Field	Description
<b>Services</b>	Select any additional login services linked to this account, such as Facebook, Yahoo or Google. <div data-bbox="354 1391 1391 1485" style="background-color: #e6f2ff; padding: 5px;"><b>Note:</b> This may be not enabled on your Portal.</div>
<b>Email</b>	Type the user's email address.

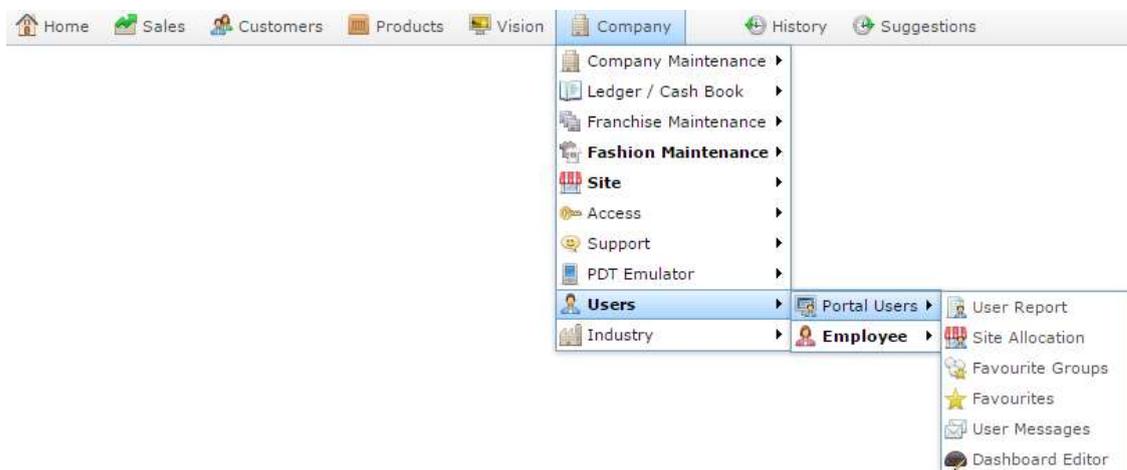
## Portal User report

Use the Portal User report to find and create user accounts with access to your Portal company.

### Opening the Portal User report

To open the Portal User report:

1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > User Report**.



The Portal User report is displayed



The screenshot shows the 'Portal User Report - Example Company' interface. It includes two buttons: 'Add Report to Favourites' and 'Create New Portal User'. Below the buttons is a table with the following data:

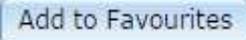
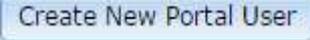
Login	First Name	Surname	Email Address	Access Level	Security	Enabled	Date Changed	Expiry Date	Last Log On
<a href="#">Example</a>	Sandra	Boyd		Master Admin	Full	✓	16/02/2015 11:14:39	14/11/2015	4/12/2014 15:40:03
<a href="#">bob</a>	Bob	Bird		Master Admin		✓	22/05/2014 22:03:25	22/05/2017	17/01/2015 16:02:03

## Portal User report key fields

### Filters area

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

---

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new Portaluser account. See <i>Creating a portal user account</i> on page 3.

---

## 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
<b>Login / Name</b>	The user's login name.
<b>First Name / Name</b>	The user's first or given name.
<b>Surname</b>	The user's surname.
<b>Email Address</b>	The user's email address.
<b>Access Level</b>	The user type denoting how many privileges the user has on the Portal. <b>Master Administrator</b> Full access to all levels of the Portal. <b>Company Administrator</b> Access to all functions and configurations within a single company. <b>Company User</b> Access to all functions within a company, but not to the company configuration or settings. <b>Site Administrator</b> Access to all functions and configurations within a

Field	Description
	single site.
<b>Supervisor</b>	Access to all functions within a site, but not the company or site configuration settings.
<b>User</b>	Access to a limited set of functions within a site.
<b>No Access</b>	No Portal access.
<b>Security / User Level</b>	<p>The area the user account has access to on the Portal via the Portal web portal or a PDT.</p> <div style="background-color: #e6f2ff; padding: 10px; border: 1px solid #000080;"> <p><b>Note:</b> The following permission levels are default areas. You can edit these permission levels or define your own using the Permission Levels option under Company Maintenance in the main menu.</p> </div>
<b>Cashup</b>	Access to the Point of Sale cashup reports, or allows an operator to perform cash-up on a PDT.
<b>Debtor</b>	Access to Debtor Maintenance.
<b>Debtor Invoicing</b>	Access to debtor invoicing.
<b>Debtor Statements</b>	Read-only access to debtor statements.
<b>Full</b>	Full access to all Portal systems.
<b>Full Debtors</b>	Full access to the debtor system.
<b>Full TRS</b>	Full access to the POSPORTAL Point of Sale.

Field	Description
<b>Inventory</b>	Access to Inventory Maintenance, procurement and suppliers.
<b>Loyalty</b>	Access to customer loyalty systems.
<b>No Access</b>	No Portal access.
<b>Read</b>	Read-only access to Portal reports, no ability to change data.
<b>Enabled</b>	If selected, this user account is currently enabled for use in the Portal.
<b>Date Changed</b>	Date this user account was last updated.
<b>Expiry Date</b>	Date this user account expires.
<b>Last Log On</b>	Date this user account was last logged in.

## Managing point of sale user accounts

You can create Point of Sale user accounts to allow your employees to log into the Point of Sale to process transactions and perform certain portal actions such as ordering stock or stocktaking via PDTs. Point of Sale users cannot log into the Portal web system.

### Also see:

- *Employee Maintenance screen* on page 65.
- *Point of Sale User report* on page 60.

### What you can do:

1. *Creating a point of sale user account* on page 38.
2. *Finding a Point of Sale user account* on page 40.
3. *Editing a point of sale user account* on page 42.
4. *Changing a point of sale user account's login name* on page 44
5. *Changing a point of sale user account's password* on page 46.
6. *Creating a point of sale supervisor* on page 52.
7. *Editing a point of sale user account's permissions* on page 49.
8. *Suspending a point of sale user account* on page 55.
9. *Deleting a point of sale user account* on page 58.

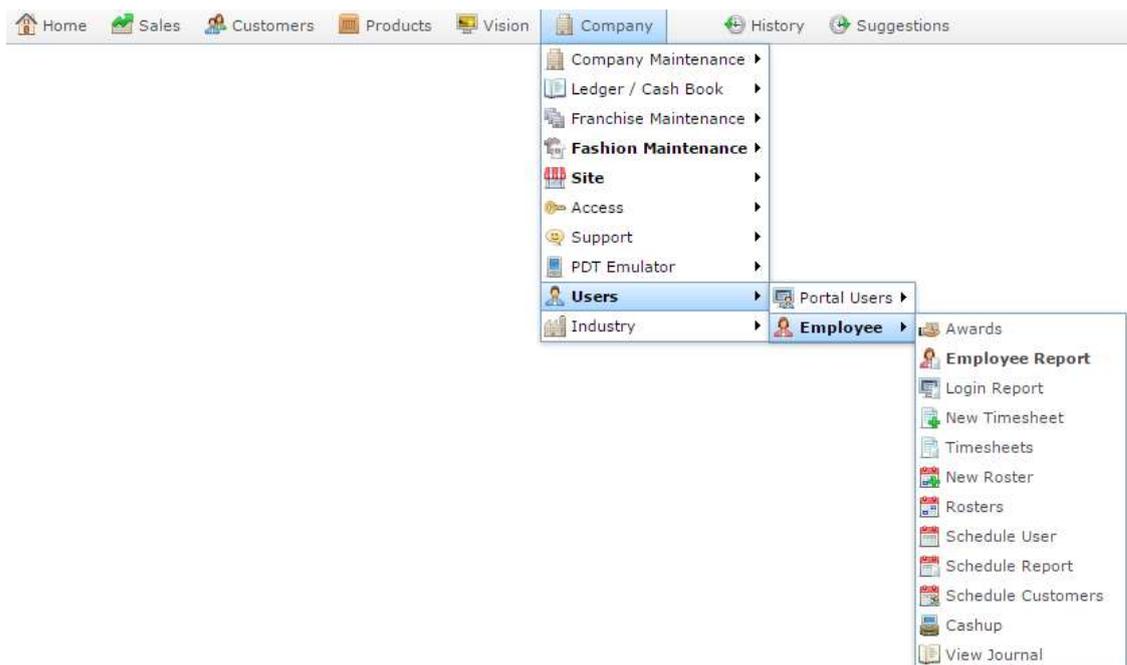
## Creating a point of sale user account

Create a new Point of Sale user account to permit a new staff member to log on and use the Point of Sale and areas of the Portal via a PDT.

**Note:** Only Point of Sale user accounts can log into the Point of Sale. Point of Sale user accounts can also log into the Portal if you give them permission to do so. See *Editing a point of sale user account's permissions* on page 49

To create a new Point of Sale user account:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > Employee Report**.

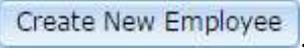


The Point of Sale User report is displayed.



The screenshot shows the 'Point of Sale User Report' table. The table has the following columns: Login, Name, Password, System #, User Level, Supervisor, Price Edit, Supervisor, Status, Acct. Expr, Pwd. Expr, Award, Salary, Position, Scheduled Position, and Scheduled Enabled. The table contains the following data:

Login	Name	Password	System #	User Level	Supervisor	Price Edit	Supervisor	Status	Acct. Expr	Pwd. Expr	Award	Salary	Position	Scheduled Position	Scheduled Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0		1	✓
Brian	Brian	4444	2	No Portal Access					Will Not Expire	24-Jan-2003	Hourly Rate	0		2	
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28-Aug-2018	Hourly Rate	0		5	✓
10	Sofie	10	6	No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0		6	

3. Press .

4. The Employee Maintenance screen is displayed.

Employee Maintenance for Chadstone

Name Passwords Security Account Salary Leave Dates

System Number: 7

Login Name:

POS Name:

Portal Name:

Find New Delete Save Reset

5. Type the name the user will use to log into the system in the **Login Name** field.
6. Type the name that should appear on the Point of Sale in the **POS Name** field.
7. Type the name that should appear on the Portal in the **Portal Name** field.
8. Press the Passwords tab.

The Passwords tab is displayed.

Employee Maintenance for Chadstone

Name Passwords Security Account Salary Leave Dates

Password:

Password Required: True

Allow Change Password: False

Force Change Password: False

Force Unique Password: False

Password Life Span: 30

Limit Grace Logins: False

Grace Login Number: 5

Remaining Grace Login: 5

Password Expiry: 18/08/2015

Find New Delete Save Reset

9. Type the password the user will use to log into the Point of Sale.

Employee Maintenance for Chadstone

Name Passwords Security Account Salary Leave Dates

Password:

Password Required: True

Allow Change Password: False

Force Change Password: False

Force Unique Password: False

Password Life Span: 30

Limit Grace Logins: False

Grace Login Number: 5

Remaining Grace Login: 5

Password Expiry: 18/08/2015

Find New Delete Save Reset

10. Press  Save.

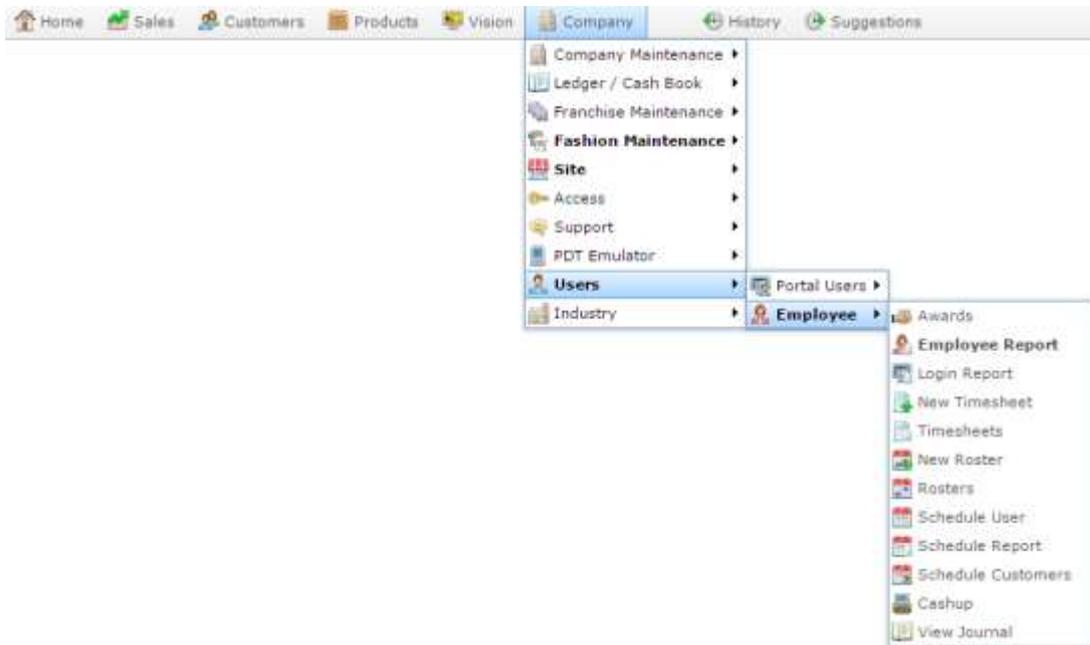
The Point of Sale user account is created.

## Finding a Point of Sale user account

Find a Point of Sale user account when you want to edit it, change the password or suspend the account.

To find a Point of Sale user account:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > Employee Report**.



The Point of Sale User report is displayed.

Login	Name	Password	System #	User Level	Supervi	Price Edit	Suspend	Status	Acct Expr	Pwd Expr	Award	Salary	Position	Schedul Position	Schedul Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0		1	✓
Brian	Brian	4444	2	No Portal Access					Will Not Expire	14-Jan-2003	Hourly Rate	0		2	
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28-Aug-2018	Hourly Rate	0		5	✓
10	Sofie	10	6	No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0		6	

3. Press the **Login** of the user account you want to open.

The Employee Maintenance screen is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

System Number: 1

Login Name:

POS Name:

Portal Name:

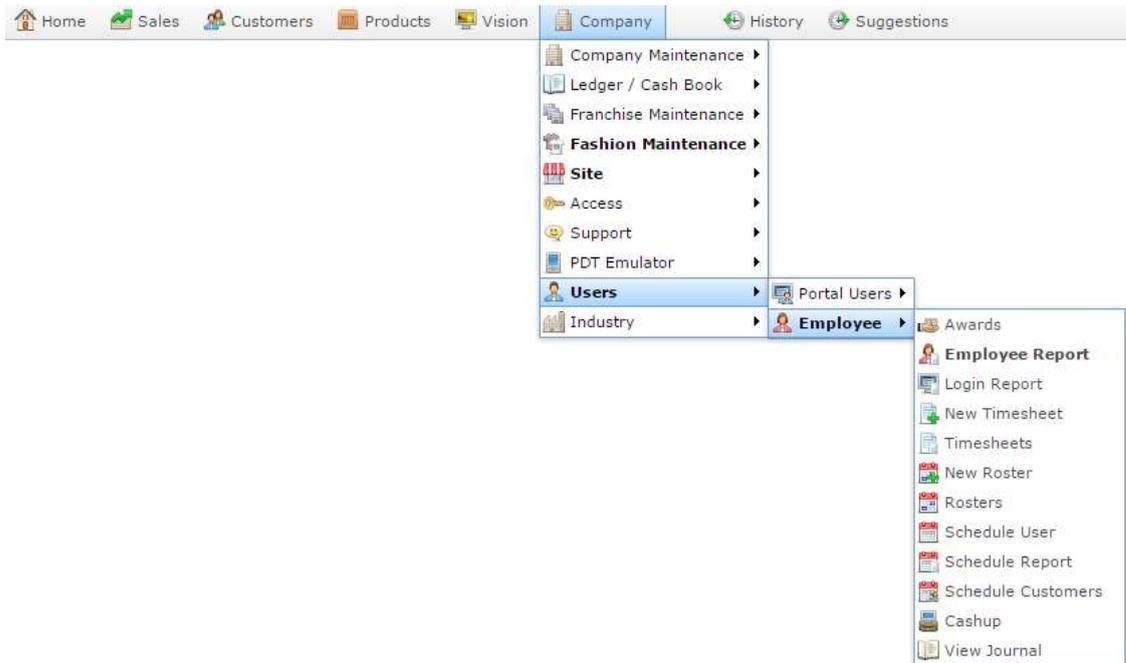
Find New Delete Save Reset

## Editing a point of sale user account

Edit a Point of Sale user account when you want to change their name or other details.

To edit a Point of Sale user account:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > Employee Report**.



The Point of Sale User report is displayed.



The screenshot shows the 'Point of Sale User Report' table. The table has the following columns: Login, Name, Password, System #, User Level, Supervi, Price Edit, Suspensi, Status, Acct Expr, Pwd Expr, Award, Salary, Position, Schemul Position, and Schemul Enabled. The table contains the following data:

Login	Name	Password	System #	User Level	Supervi	Price Edit	Suspensi	Status	Acct Expr	Pwd Expr	Award	Salary	Position	Schemul Position	Schemul Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0		1	✓
Brian	Brian	4444	2	No Portal Access					Will Not Expire	24-Jan-2003	Hourly Rate	0		2	
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28-Aug-2018	Hourly Rate	0		5	✓
10	Sofie	10	6	No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0		6	

3. Press the **Login** of the user account you want to open.

The Employee Maintenance screen is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

System Number: 1

Login Name:

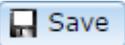
POS Name:

Portal Name:

 Find  New  Delete  Save  Reset

4. Make the required changes.

See *Employee Maintenance screen* on page 65.

5. Press .

The changes are saved.

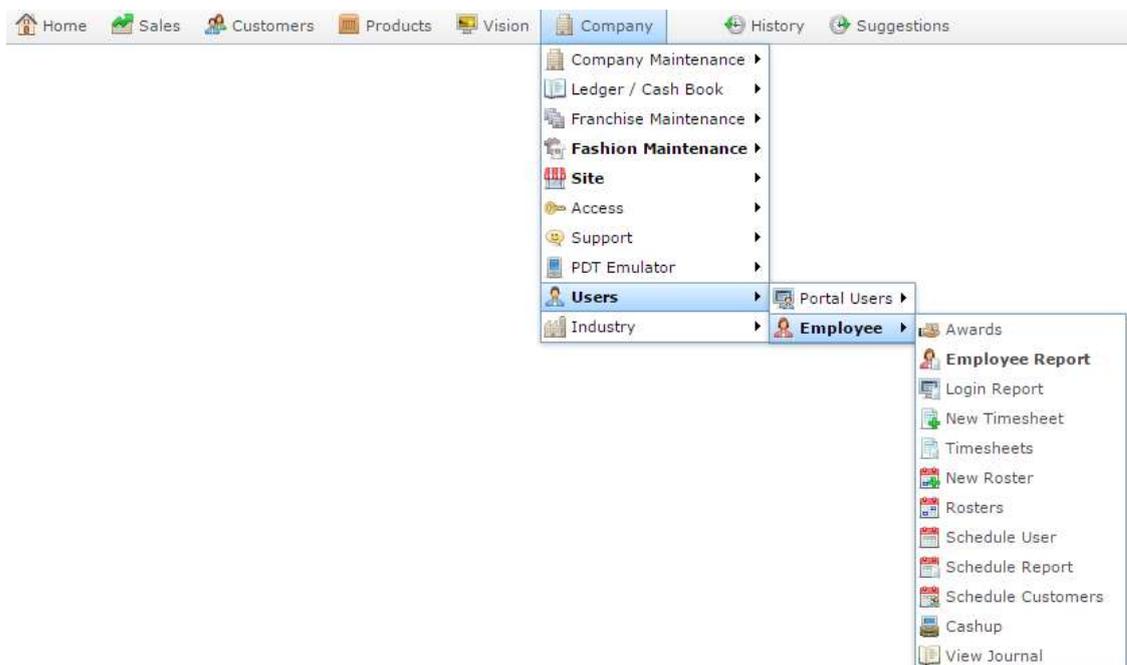
## Changing a point of sale user account's login name

Change a Point of Sale user account's login name when you want to change the username or operator name they use to log into the Point of Sale.

**Note:** This does not change the name displayed on the Portal or the Point of Sale. See *Employee Maintenance* screen on page 65.

To change a Point of Sale user account login name:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > Employee Report**.



The Point of Sale User report is displayed.



The screenshot shows the 'Point of Sale User Report' table. The table has columns: Login, Name, Passwor #, System, User Level, Supervi, Price Edit, Supervi, Status, Acct, Pwd, Award, Salary, Position, Schedul, Schedul, and Enabled. The table contains four rows of data.

Login	Name	Passwor #	System	User Level	Supervi	Price Edit	Supervi	Status	Acct	Pwd	Award	Salary	Position	Schedul	Schedul	Enabled
1	Susan	1111		1 Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0		1		✓
Brian	Brian	4444		2 No Portal Access					Will Not Expire	24-Jan-2003	Hourly Rate	0		2		
100	Andrew	100		5 Full	✓	✓			Will Not Expire	25-Aug-2016	Hourly Rate	0		5		✓
10	Sofie	10		6 No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0		6		

3. Press the **Login** of the user account you want to open.

The Employee Maintenance screen is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

System Number: 1

Login Name:

POS Name:

Portal Name:

Find New Delete Save Reset

4. Type the new login into the **Login Name** field.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

System Number: 1

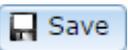
Login Name:

POS Name:

Portal Name:

Find New Delete Save Reset

**Note:** Some services such as Pay at Table require logins that contain only numbers.

5. Press .

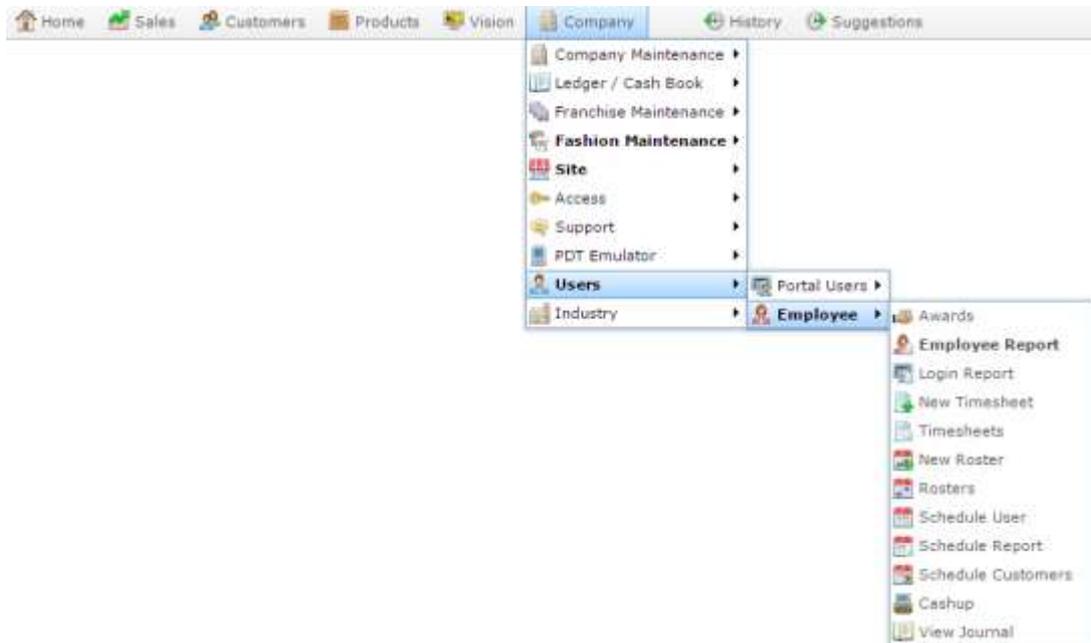
The new login name is saved.

## Changing a point of sale user account's password

Change the Point of Sale user account password to change the password used to log into the Point of Sale.

To change the Point of Sale user account password:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > Employee Report**.



The Point of Sale User report is displayed.

Login	Name	Password	System #	User Level	Superv	Price Edit	Suspend	Status	Acct Expr	Pwd Expr	Award	Salary	Position	Schedul Position	Schedul Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0	1	1	✓
Brian	Brian	4444	2	No Portal Access					Will Not Expire	14-Jan-2003	Hourly Rate	0	2	2	
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0	5	5	✓
10	Sofie	10	6	No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0	6	6	

3. Press the **Login** of the user account you want to open.

The Employee Maintenance screen is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

System Number: 1

Login Name: 1

POS Name: Susan

Portal Name: Susan

Find New Delete Save Reset

4. Press the Passwords tab.

The Passwords tab is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

Password:

Password Required: True

Allow Change Password: False

Force Change Password: False

Force Unique Password: False

Password Life Span: 30

Limit Grace Logins: False

Grace Login Number: 5

Remaining Grace Login: 5

Password Expiry: 18/08/2015

Find New Delete Save Reset

5. Type the new password into the Point of Sale.

Employee Maintenance for Chadstone

Name Passwords Security Account Salary Leave Dates

Password:

Password Required: True

Allow Change Password: False

Force Change Password: False

Force Unique Password: False

Password Life Span: 30

Limit Grace Logins: False

Grace Login Number: 5

Remaining Grace Login: 5

Password Expiry: 18/08/2015

Find New Delete Save Reset

6. Press  Save.

The new password is saved.

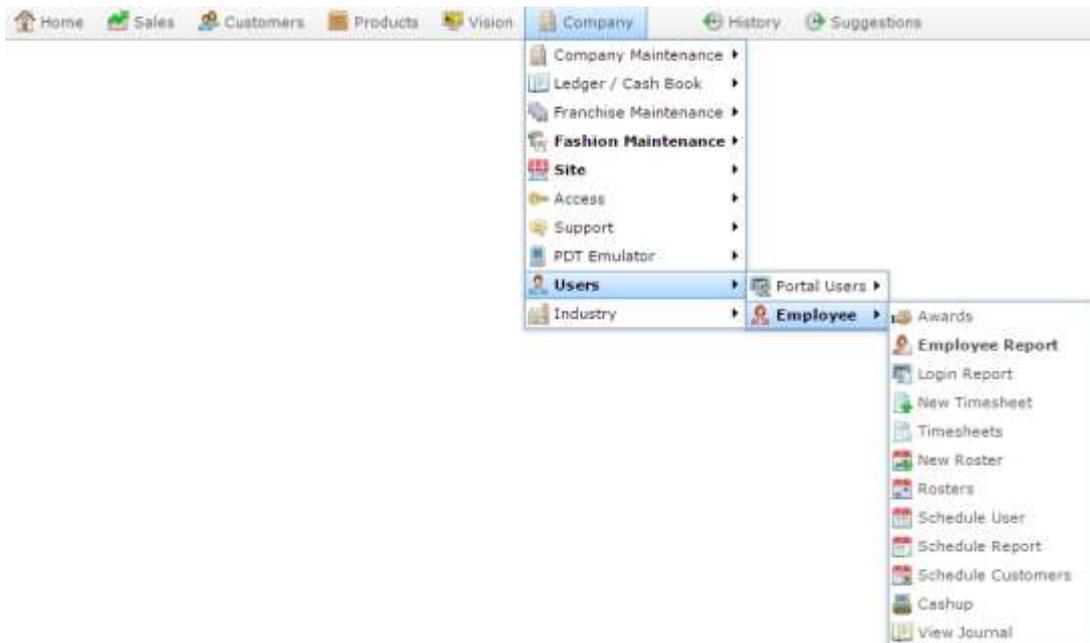
## Editing a point of sale user account's permissions

Edit a Point of Sale user account's permissions to allow or deny:

- Access to certain areas of the Portal.
- The ability to send price changes from the Point of Sale to the Portal.
- The ability to authorise certain Point of Sale actions.
- Access to the Point of Sale setup screens.

To edit a Point of Sale user account's permissions:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > Employee Report**.



The Point of Sale User report is displayed.

Login	Name	Passwor #	System	User Level	Supervi	Price Edit	Suspeni	Status	Acct. Expr	Pwd Expr	Award	Salary	Position	Schedul Position	Schadul Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28- Aug- 2016	Hourly Rate	0		1	✓
Brian	Brian	4444	2	No Portal Access					Will Not Expire	14- Jan- 2003	Hourly Rate	0		2	
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28- Aug- 2018	Hourly Rate	0		5	✓
10	Sofie	10	6	No Portal Access					Will Not Expire	14- May- 2016	Hourly Rate	0		6	

3. Press the **Login** of the user account you want to open.

The Employee Maintenance screen is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

System Number: 1

Login Name: 1

POS Name: Susan

Portal Name: Susan

Find New Delete Save Reset

4. Press the Security tab.

The Security tab is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

User Security Level: Full

Schedule User: True

Schedule User Position: 1

POS Price Edit: True

POS Supervisor: True

Access to POS Setup: True

Find New Delete Save Reset

5. Select the Portal areas the user account can access from the **User Security Level** drop-down list.

**Employee Maintenance for Chadstone**

Name Passwords **Security** Account Salary Leave Dates

User Security Level: Full

Schedule User: True

Schedule User Position: 1

POS Price Edit: True

POS Supervisor: True

Access to POS Setup: True

Find New Delete Save Reset

6. Select **True**:

- In the **POS Price Edit** drop-down list to allow the user account to send price changes from the Point of Sale to the Point of Sale.
- In the **POS Supervisor** drop-down list to allow the user account to authorise Point of Sale actions that require a supervisor.
- In the **Access to POS Setup** drop-down list to allow the user account to access the Point of Sale setup screens.

**Employee Maintenance for Chadstone**

Name Passwords **Security** Account Salary Leave Dates

User Security Level: Full

Schedule User: True

Schedule User Position: 1

POS Price Edit: True

POS Supervisor: True

Access to POS Setup: True

Find New Delete Save Reset

7. Press  **Save**.

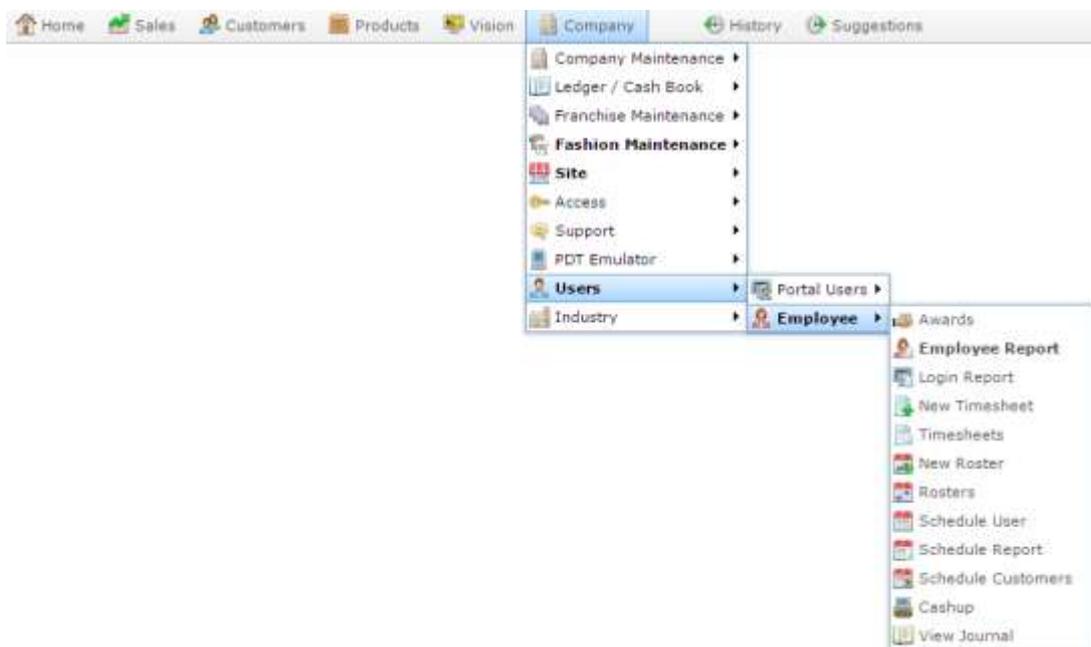
The new password is saved.

## Creating a point of sale supervisor

Create a Point of Sale supervisor so they can perform or authorise restricted actions at the Point of Sale. Which Point of Sale actions require supervisor authorisation depends on your Point of Sale configuration. Examples of restricted actions include advances, handovers, changing the terminal settings and applying discounts.

To create a Point of Sale supervisor:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > Employee Report**.



The Point of Sale User report is displayed.

Point of Sale User Report

Login	Name	Password	System #	User Level	Supervisory	Price Edit	Suspensi	Status	Acct Expr	Pwd Expr	Award	Salary	Position	Schedul Position	Schedul Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0		1	✓
Brian	Brian	4444	2	No Portal Access					Will Not Expire	24-Jan-2003	Hourly Rate	0		2	
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28-Aug-2015	Hourly Rate	0		5	✓
10	Sofie	10	6	No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0		6	

3. Press the **Login** of the user account you want to open.

The Employee Maintenance screen is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

System Number: 1

Login Name: 1

POS Name: Susan

Portal Name: Susan

Find New Delete Save Reset

4. Press the Security tab.

The Security tab is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

User Security Level: Full

Schedule User: True

Schedule User Position: 1

POS Price Edit: True

POS Supervisor: True

Access to POS Setup: True

Find New Delete Save Reset

5. Select **True** In the **POS Supervisor** drop-down list to allow the user account to authorise Point of Sale actions that require a supervisor.

**Employee Maintenance for Chadstone**

Name Passwords **Security** Account Salary Leave Dates

User Security Level: Full

Schedule User: True

Schedule User Position: 1

POS Price Edit: True

**POS Supervisor: True**

Access to POS Setup: True

Find New Delete Save Reset

6. Press  Save.

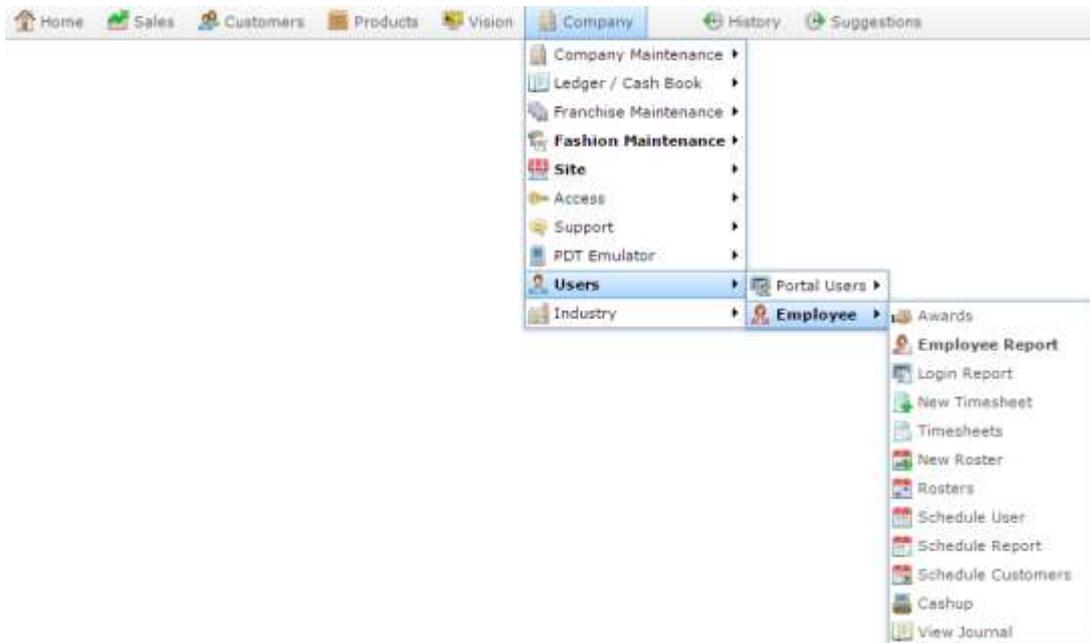
The supervisor settings are saved.

## Suspending a point of sale user account

Suspend a Point of Sale user account if you don't want the user account to have access to the Point of Sale for a period of time. For example, if the employee goes on leave.

To suspend a Point of Sale user account:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > Employee Report**.



The Point of Sale User report is displayed.

Login	Name	Password	System #	User Level	Superv	Price Edit	Suspend	Status	Acct Expr	Pwd Expr	Award	Salary	Position	Schedul Position	Schedul Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0	1	✓	
Brian	Brian	4444	2	No Portal Access					Will Not Expire	14-Jan-2003	Hourly Rate	0	2		
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28-Aug-2018	Hourly Rate	0	5	✓	
10	Sofie	10	6	No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0	6		

3. Press the **Login** of the user account you want to open.

The Employee Maintenance screen is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

System Number: 1

Login Name: 1

POS Name: Susan

Portal Name: Susan

Find New Delete Save Reset

4. Press the Account tab.

The Account tab is displayed.

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary Leave Dates

Status:

User Suspended: False

Account Expires: False

Account Expiry: 28/08/2010

Account Active: 16/01/2003

Last Login: 17/02/2015

Find New Delete Save Reset

5. Select **True** from the **User Suspended** drop-down list.

**Employee Maintenance for Chadstone**

Name Passwords Security **Account** Salary Leave Dates

Status:

User Suspended: False

Account Expires: False

Account Expiry: 28/08/2010

Account Active: 16/01/2003

Last Login: 17/02/2015

6. Press .

The user account is suspended and cannot be used to log into the Point of Sale.

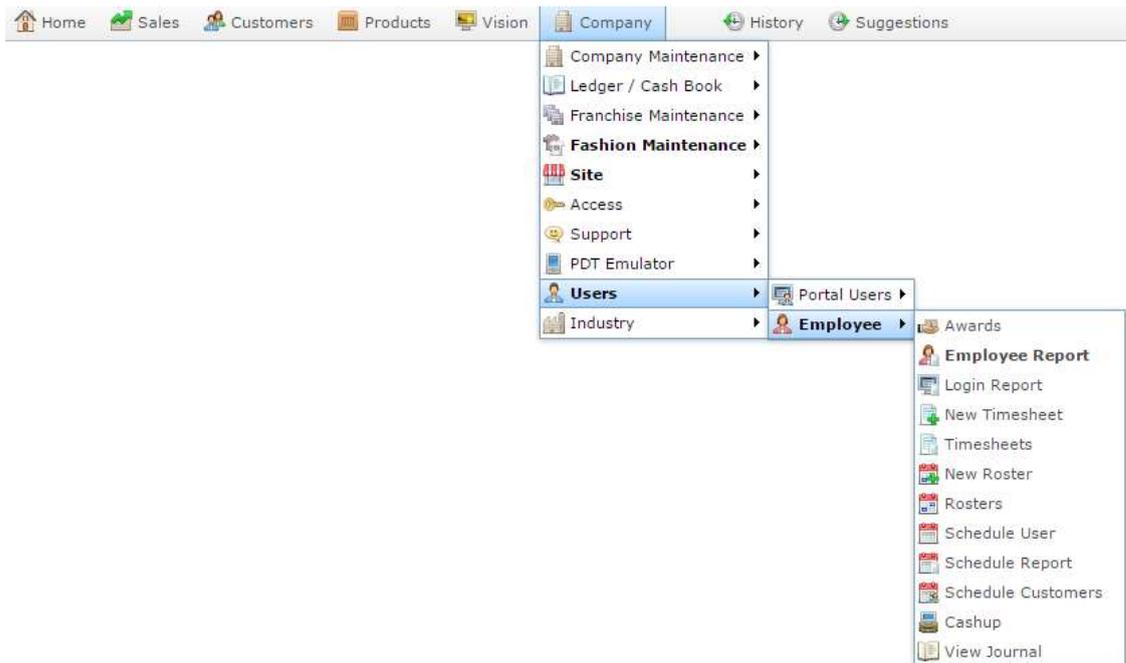
## Deleting a point of sale user account

Delete a Point of Sale user account when you want to remove them entirely from the Point of Sale and the Portal.



**Important note:** Deleting users that have operated the Point of Sale is not recommended, as it removes the audit trail for that user's actions within the Point of Sale. You can suspend a user account without deleting it. Suspended user accounts cannot be used to log into the Point of Sale. See *Suspending a point of sale user account* on page 55.

1. Press  in the main menu bar.
2. Press **Users > Employee > Employee Report**.

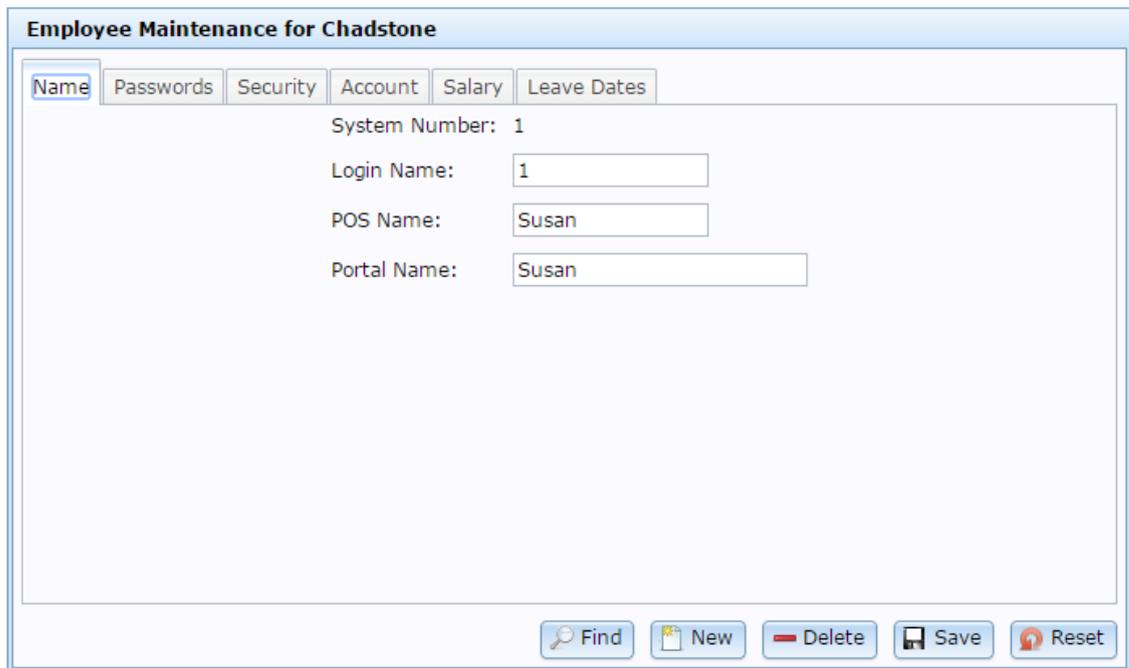


The Point of Sale User report is displayed.

Login	Name	Password	System #	User Level	Supervise	Price Edit	Suspend	Status	Acct Expr	Perd Expr	Award	Salary	Position	Schedule Position	Schedule Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0		1	✓
Brian	Brian	4444	2	No Portal Access					Will Not Expire	24-Jan-2003	Hourly Rate	0		2	
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28-Aug-2018	Hourly Rate	0		5	✓
10	Sofie	10	6	No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0		6	

3. Press the **Login** of the user account you want to open.

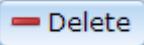
The Employee Maintenance screen is displayed.



The screenshot shows a web application window titled "Employee Maintenance for Chadstone". At the top, there are several tabs: "Name", "Passwords", "Security", "Account", "Salary", and "Leave Dates". The "Name" tab is currently selected. Below the tabs, the form displays the following information:

- System Number: 1
- Login Name: 1
- POS Name: Susan
- Portal Name: Susan

At the bottom of the form, there are five buttons: "Find" (with a magnifying glass icon), "New" (with a document icon), "Delete" (with a red minus sign icon), "Save" (with a floppy disk icon), and "Reset" (with a circular arrow icon).

4. Press .

ThePoint of Sale user account is deleted.

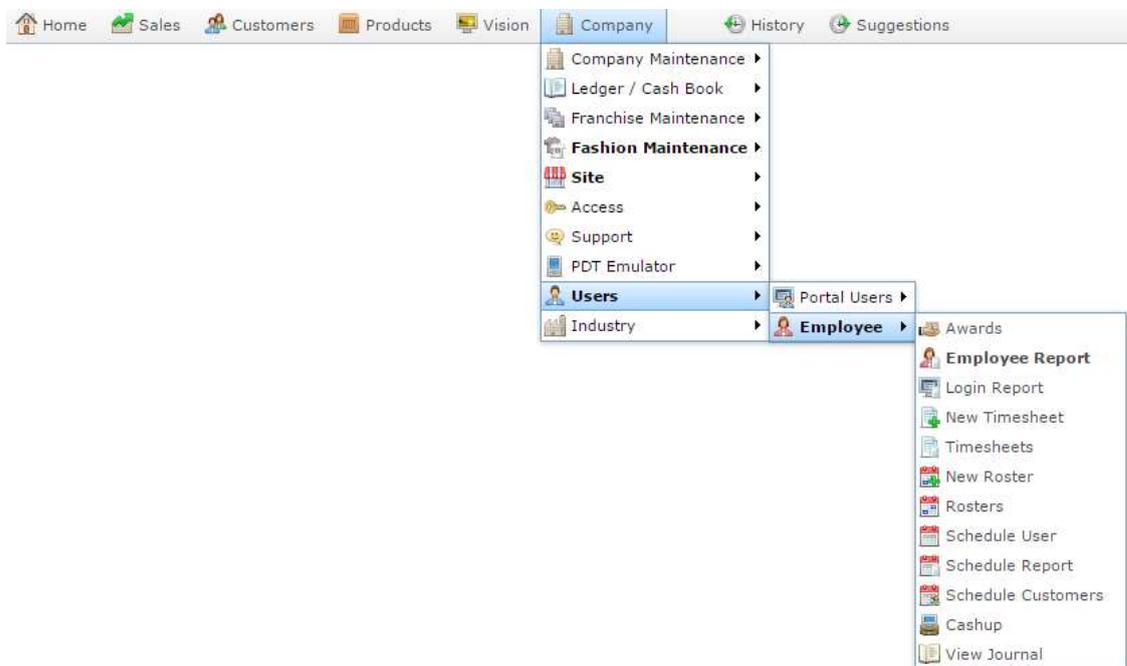
## Point of Sale User report

Use this report to find and create employees that can access the portal or the Point of Sale.

### Opening the Point of Sale User report

To open the Point of Sale User report :

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > Employee Report**.



The Point of Sale User report is displayed.

**Point of Sale User Report**

Site: Chadstone

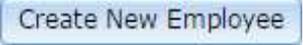
Login	Name	Password #	System	User Level	Supervisor	Price Edit	Suspension	Status	Acct. Expr.	Pwd. Expr.	Award	Salary	Position	Schedule Position	Schedule Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0		1	✓
<u>Brian</u>	Brian	4444	2	No Portal Access					Will Not Expire	24-Jan-2003	Hourly Rate	0		2	
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28-Aug-2018	Hourly Rate	0		5	✓
10	Sofie	10	6	No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0		6	

## Point of Sale User report key fields

### Filters area

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

---

<b>Field</b>	<b>Description</b>
	Press to add this report to your Portal favourites for easier access.
	Press to create a new Point of Sale user account. <i>See <a href="#">Creating a point of sale user account</a> on page 38.</i>
<b>Site</b>	Select the site to report on.

---

## Report area

This area displays report information.

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

Field	Description
<b>Login / Name</b>	The user's login name.
<b>First Name / Name</b>	The user's first or given name.
<b>Password</b>	The user's password for the Point of Sale.
<b>System #</b>	Code from 1 to 9999 that represents the operator to the Portal. This allows the Portal to identify users even if the users change their login.  <b>Note:</b> System numbers <b>1</b> to <b>5</b> are usually cash drawers, where several operators share a single cash drawer.
<b>Security / User Level</b>	The area the user account has access to on the Portal via the Portal web portal or a PDT.  <b>Note:</b> The following permission levels are default areas. You can edit these permission levels or define your own using the Permission Levels option under Company Maintenance in the main menu.  <b>Cashup</b> Access to the Point of Sale cashup reports, or allows an operator to perform cash-up on a PDT.

<b>Field</b>	<b>Description</b>
<b>Debtor</b>	Access to Debtor Maintenance.
<b>Debtor Invoicing</b>	Access to debtor invoicing.
<b>Debtor Statements</b>	Read-only access to debtor statements.
<b>Full</b>	Full access to all Portal systems.
<b>Full Debtors</b>	Full access to the debtor system.
<b>Full TRS</b>	Full access to the POSPORTAL Point of Sale.
<b>Inventory</b>	Access to Inventory Maintenance, procurement and suppliers.
<b>Loyalty</b>	Access to customer loyalty systems.
<b>No Access</b>	No Portal access.
<b>Read</b>	Read-only access to Portal reports, no ability to change data.
<b>Supervisor</b>	If selected, this user account can provide supervisor authorisation on the Point of Sale.
<b>Price Edit</b>	If selected, this user account is authorised to send price changes from the Point of Sale to the Portal.
<b>Suspended</b>	If selected, this user account has been suspended and cannot access or log

Field	Description
	into the Portal or Point of Sale.
<b>Status</b>	Employee status, such as "on leave".
<b>Acct Expr</b>	Either: <ul style="list-style-type: none"> <li>▪ <b>Will Not Expire</b> if the account is configured to not expire at a set date.</li> <li>▪ The date the account expires.</li> </ul>
<b>Pwd Expr</b>	Date the password for this account expires.
<b>Award</b>	Award rate for this employee, which sets the employee's base salary.
<b>Salary</b>	Salary as determined by the employee's award rate and any variations, used for calculating time sheets.
<b>Position</b>	Employee's position within your company.
<b>Scheduler Position</b>	Ordering of employee buttons in the scheduling system. Lower numbers appear earlier.
<b>Scheduler Enabled</b>	If selected, this employee is available within the scheduling system.

## Employee Maintenance screen

Use the Employee Maintenance screen to maintain Point of Sale user accounts and employee records including:

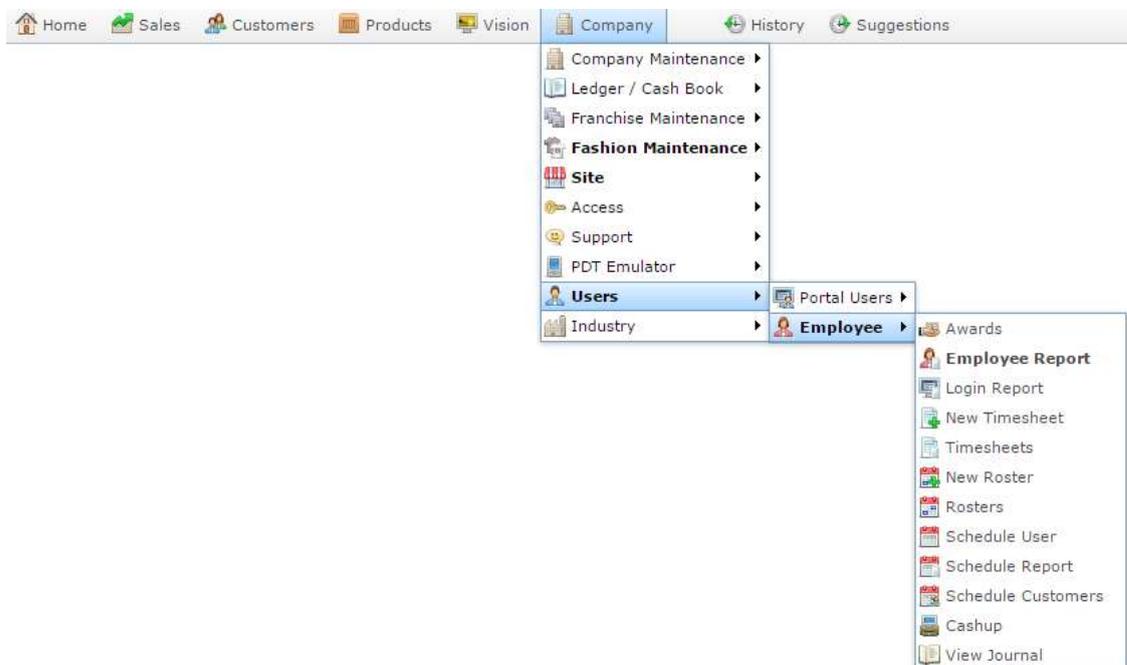
- Point of Sale passwords.
- Security and access settings.
- Employee position, salary, award and leave dates.

**Note:** You do not require an administrator's password to change the Point of Sale user account settings.

## Opening the Employee Maintenance screen

To open the Employee Maintenance screen:

1. Press  in the main menu bar.
2. Press **Users > Employee > Employee Report**.



The Point of Sale User report is displayed.

**Point of Sale User Report**

Site: Chadstone

Login	Name	Password #	System #	User Level	Supervise	Price Edit	Suspend	Status	Acct Expr	Pwd Expr	Award	Salary	Position	Schedule Position	Schedule Enabled
1	Susan	1111	1	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0		1	✓
Brian	Brian	4444	2	No Portal Access					Will Not Expire	14-Jan-2003	Hourly Rate	0		2	
100	Andrew	100	5	Full	✓	✓			Will Not Expire	28-Aug-2016	Hourly Rate	0		5	✓
10	Sofie	10	6	No Portal Access					Will Not Expire	14-May-2016	Hourly Rate	0		6	

3. Press the **Login** of the user account you want to open.

The Employee Maintenance screen is displayed.

**Employee Maintenance for Chadstone**

Name | Passwords | Security | Account | Salary | Leave Dates

System Number: 1

Login Name:

POS Name:

Portal Name:

Find | New | Delete | Save | Reset

## Employee Maintenance screen key fields and buttons

### Name tab

The screenshot shows a web application window titled "Employee Maintenance for Chadstone". At the top, there are several tabs: "Name", "Passwords", "Security", "Account", "Salary", and "Leave Dates". The "Name" tab is selected. Below the tabs, the form displays the following fields and values:

- System Number: 1
- Login Name: 1
- POS Name: Susan
- Portal Name: Susan

At the bottom of the form, there are five buttons: "Find" (with a magnifying glass icon), "New" (with a document icon), "Delete" (with a red minus sign icon), "Save" (with a floppy disk icon), and "Reset" (with a circular arrow icon).

Use this area to maintain the names used on the Point of Sale and Portal.

Field	Description
<b>System Number</b>	Number identifying the user account in the database.
<b>Login Name</b>	The name used for logging into the Point of Sale. <div style="border: 1px solid #0056b3; background-color: #e6f2ff; padding: 5px; margin-top: 10px;"><b>Note:</b> Some services such as Pay at Table require the login name to contain only numbers.</div>
<b>POS Name</b>	The name displayed on the Point of Sale.
<b>Portal Name</b>	The name displayed on the Portal.

## Passwords tab

**Employee Maintenance for Chadstone**

Name | Passwords | Security | Account | Salary | Leave Dates

---

Password:

Password Required:

Allow Change Password:

Force Change Password:

Force Unique Password:

Password Life Span:

Limit Grace Logins:

Grace Login Number:

Remaining Grace Login:

Password Expiry:

Use this area to maintain the user account password and password rules.

Field	Description
<b>Password</b>	The password to log in to the Point of Sale.
<b>Password Required</b>	Select if a password is required for this account to log into the Point of Sale.
<b>Allow Change Password</b>	Select to allow this user to change their password on the Point of Sale.
<b>Force Change Password</b>	Select to require this user to change their password on their next login to the Point of Sale.
<b>Force Unique</b>	Select to require the user to choose a password they haven't used

Field	Description
<b>Password</b>	before each time they change their password.
<b>Password Life Span</b>	Type the number of days a password is valid for, after which it automatically expires.
<b>Limit Grace Logins</b>	Select True to limit the number of times a user can log in if their password has expired.
<b>Grace Login Number</b>	Type the total number of times a user can log in after their password has expired.
<b>Remaining Grace Login</b>	If their password has expired, this tracks the number of times remaining that a user can log in with their expired password.
<b>Password Expiry</b>	Date the current password expires.

## Security tab

**Employee Maintenance for Chadstone**

Name | Passwords | **Security** | Account | Salary | Leave Dates

---

User Security Level:

Schedule User:

Schedule User Position:

POS Price Edit:

POS Supervisor:

Access to POS Setup:

---

Use this area to maintain the access and this user account has to the Point of Sale and Portal.

Field	Description
<b>User Security Level</b>	Select the areas of access this user has to the Portal. <div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> The following permission levels are default areas. You can edit these permission levels or define your own using the Permission Levels option under Company Maintenance in the main menu.</p> </div>
<b>Cashup</b>	Access to the Point of Sale cashup reports, or allows an operator to perform cash-up on a PDT.
<b>Debtor</b>	Access to Debtor Maintenance.
<b>Debtor Invoicing</b>	Access to debtor invoicing.

<b>Field</b>	<b>Description</b>
<b>Debtor Statements</b>	Read-only access to debtor statements.
<b>Full</b>	Full access to all Portal systems.
<b>Full Debtors</b>	Full access to the debtor system.
<b>Full TRS</b>	Full access to the POSPORTAL Point of Sale.
<b>Inventory</b>	Access to Inventory Maintenance, procurement and suppliers.
<b>Loyalty</b>	Access to customer loyalty systems.
<b>No Access</b>	No Portal access.
<b>Read</b>	Read-only access to Portal reports, no ability to change data.
<b>Schedule User</b>	Select to include the user account in the scheduling system.
<b>Schedule User Position</b>	Type the order in which the user account should appear in the scheduler.
<b>POS Price Edit</b>	Select <b>True</b> to allow this user account to send price changes from the Point of Sale to the Portal.
<b>POS Supervisor</b>	Select <b>True</b> to allow this user account to authorise actions on the Point of Sale.

---

Field	Description
<b>Access to POS Setup</b>	Select <b>True</b> to allow this user account to access the POSPORTAL Point of Sale setup.  <div data-bbox="427 450 1393 618" style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 10px;"><p><b>Note:</b> Access to the iZen Point of Sale setup is restricted to supervisor access. See <i>Creating a point of sale supervisor</i> on page 52.</p></div>

---

## Account tab

**Employee Maintenance for Chadstone**

Name Passwords Security **Account** Salary Leave Dates

Status:

User Suspended: False

Account Expires: False

Account Expiry: 28/08/2010

Account Active: 16/01/2003

Last Login: 17/02/2015

Use this area to maintain the user account's expiry and status.

Field	Description
<b>Status</b>	Note on the status of the account, such as "on leave".
<b>User Suspended</b>	Select <b>True</b> to suspend the user. Suspended users cannot log into the Point of Sale.
<b>Account Expires</b>	Select <b>True</b> to force the account to automatically expire on a set date.
<b>Account Expiry</b>	Select the date the account automatically expires. <b>Note:</b> This date is ignored if <b>Account Expires</b> is set to <b>False</b> .

---

Field	Description
<b>Account Active</b>	Select the date from which the account is active. <div data-bbox="424 416 1394 544" style="border: 1px solid #d9534f; padding: 5px; margin-top: 10px;"><b>Tip:</b> You can set a future date to create accounts for employees that have not started work yet or who are returning from a long absence.</div>
<b>Last Login</b>	Date the user account last logged into the Point of Sale.

---

## Salary tab

**Employee Maintenance for Chadstone**

Name Passwords Security Account **Salary** Leave Dates

Position:

Award: Hourly Rate

Award Variation: \$0.00

Find New Delete Save Reset

Use this area to maintain an employee's award rates and company position.

Field	Description
<b>Position</b>	Position the employee holds within your company.
<b>Award</b>	Award level applicable to the employee, which determines their base salary.
<b>Award Variation</b>	Any adjustments to the award rate of the employee. If no award rate is selected, this is the employee's salary.

## Leave Dates tab

**Employee Maintenance for Chadstone**

Name Passwords Security Account Salary **Leave Dates**

Upcoming Rostered Leave Dates:

Date	Full Day	Half Day
------	----------	----------

Find New Delete Save Reset

Use this area to view dates the employee is on leave.

---

Field	Description
<b>Date</b>	Date the leave is scheduled.
<b>Full Day</b>	Selected if the leave is a full day.
<b>Half Day</b>	Selected if the leave is a half day or less.

---

## Rosters Maintenance

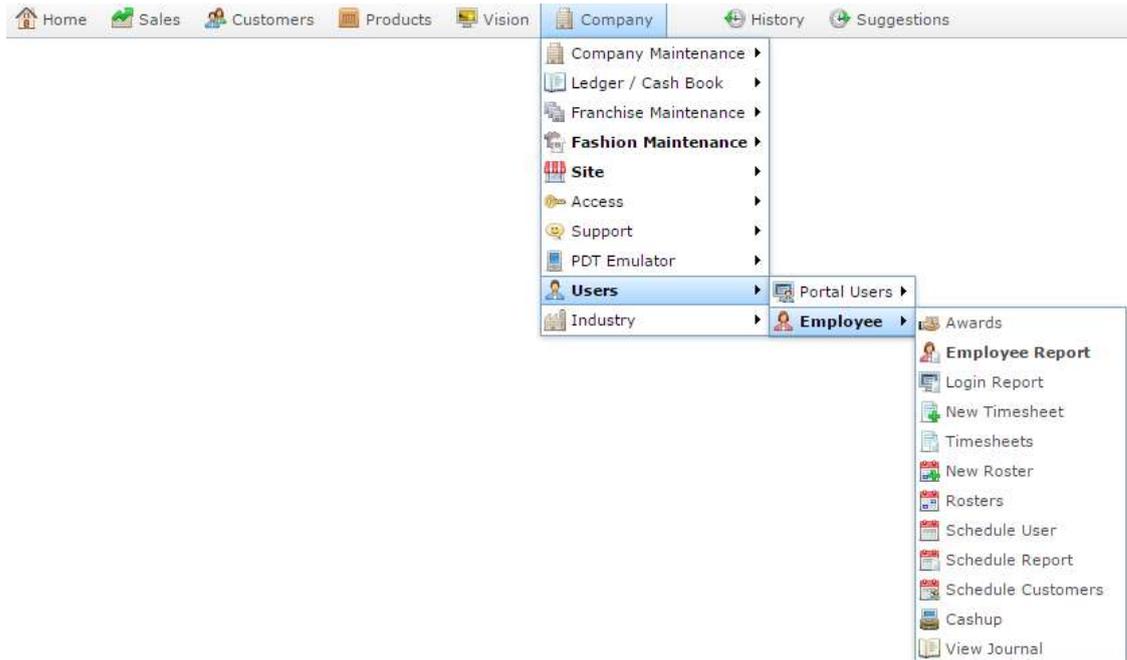
Use the Roster Maintenance screen to:

- View and maintain an employee's roster for a specific week or month. See *View rosters for a specific employee or date* on page 84.
- Add roster entries for an employee. See *Add or edit a roster* on page 86.
- Copy one or more roster entries. See *Copy a roster* on page 89.
- Make a roster recur a selected number of weeks or months. See *Set a roster to recur* on page 94.

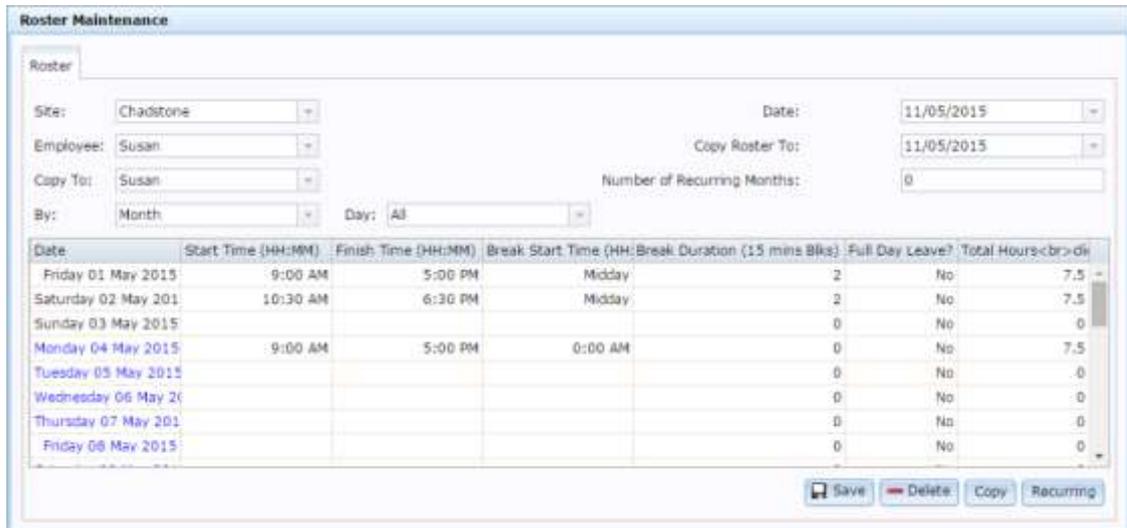
## Opening the Roster Maintenance screen

To open the Roster Maintenance screen

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > New Roster**.



The Roster Maintenance window is displayed.



The Roster Maintenance window is displayed. It shows a form for creating a roster for Susan at Chadstone on 11/05/2015. The form includes fields for Site, Employee, Copy To, By, Date, Copy Roster To, and Number of Recurring Months. Below the form is a table showing the roster data for the selected date.

Date	Start Time (HH:MM)	Finish Time (HH:MM)	Break Start Time (HH:MM)	Break Duration (15 mins Blks)	Full Day Leave?	Total Hours (hrs:min)
Friday 01 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Saturday 02 May 2015	10:30 AM	6:30 PM	Midday	2	No	7.5
Sunday 03 May 2015				0	No	0
Monday 04 May 2015	9:00 AM	5:00 PM	0:00 AM	0	No	7.5
Tuesday 05 May 2015				0	No	0
Wednesday 06 May 2015				0	No	0
Thursday 07 May 2015				0	No	0
Friday 08 May 2015				0	No	0

## Roster Maintenance screen key fields and buttons

### Selection fields

The screenshot shows a web form titled 'Roster' with the following fields:

- Site: Chadstone
- Employee: Susan
- Copy To: Susan
- By: Month
- Day: All
- Date: 11/05/2015
- Copy Roster To: 11/05/2015
- Number of Recurring Months: 0

Use these fields to:

- manage how the roster is displayed
- select which month or week's roster to display
- select the date and employee to copy roster entries to
- select how many months or weeks a roster recurs.

Field	Description
<b>Site</b>	Select the site you want to manage rosters for.
<b>Employee</b>	Select the employee whose roster you want to view or maintain. See <i>View rosters for a specific employee or date</i> on page 84.
<b>Copy To</b>	Select the employee you want to copy a roster to.  <b>Note:</b> You can select the same employee as in the <b>Employee</b> field if you want to copy an employee's roster entries to another date in their roster.
<b>By</b>	Select to display the roster for: <ul style="list-style-type: none"><li>▪ one week</li></ul> <b>Note:</b> The day your week starts on is configured in the Portal and may differ from this documentation. <ul style="list-style-type: none"><li>▪ one month.</li></ul> <p>The Recurring roster feature operates differently depending on this</p>

Field	Description
	<p>field selection:</p> <ul style="list-style-type: none"> <li>▪ If you recur a roster while in <b>Week</b> view, the roster is copied by day-of-the-week, so that Monday's roster entry recurs on Mondays, ignoring what date in the month it falls on.</li> <li>▪ If you recur a roster while in <b>Month</b> view, the roster is copied by date, so that the first-of-the-month roster entry recurs on the first-of-the-month, ignoring the day of the week.</li> </ul> <p>See <i>Set a roster to recur</i> on page 94.</p>
<b>Day</b>	<p>Select to display the rosters for:</p> <ul style="list-style-type: none"> <li>▪ A specific day of the week. For example all Mondays in the month.</li> <li>▪ All days.</li> </ul> <div style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> This field is only displayed when the <b>Month</b> view is selected in the <b>By</b> field.</p> </div>
<b>Date</b>	<p>Select the month or week you want to view the roster for. See <i>View rosters for a specific employee or date</i> on page 84.</p> <div style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> You must click on another field after changing the date to make the Roster grid update. For example, select a new date and then click the <b>By</b> field.</p> </div>
<b>Copy Roster To</b>	<p>Select the date you want to copy the roster entries to.</p> <p>For example, if you want to copy the roster entries to December 15th, the <b>Copy Roster To</b> date should be <b>December 15th</b>. See <i>Copy a roster</i> on page 89.</p>
<b>Number of Recurring Months</b>	<p>Type in the number of months you want to repeat the currently displayed roster.</p> <p>For example, if you want the current month's roster to repeat for another two months (running for three months in total) type <b>2</b>. See <i>Set</i></p>

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

*a roster to recur on page 94.*

**Note:** This field is only displayed when the **Month** view is selected in the **By** field.

**Number of Recurring Weeks**

Type in the number of weeks you want to repeat the currently displayed roster.

For example, if you want the current week's roster to repeat for another five weeks (running for six weeks in total) type **5**. See *Set a roster to recur* on page 94.

**Note:** This field is only displayed when the **Week** view is selected in the **By** field.

**Roster grid**

Date	Start Time (HH:MM)	Finish Time (HH:MM)	Break Start Time (HH:Break Duration (15 mins Blks)	Full Day Leave?	Total Hours cli	
Friday 01 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Saturday 02 May 2015	10:30 AM	6:30 PM	Midday	2	No	7.5
Sunday 03 May 2015				0	No	0
Monday 04 May 2015	9:00 AM	5:00 PM	0:00 AM	0	No	7.5
Tuesday 05 May 2015				0	No	0
Wednesday 06 May 2015				0	No	0
Thursday 07 May 2015				0	No	0
Friday 08 May 2015				0	No	0

Use these fields to:

- create and maintain roster entries for the employee
- select roster entries to copy.

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

**Date**

The date of the roster entry.

**Note:** In **Month** view, every second week is displayed in blue font to help you see weeks easily.

Field	Description
<b>Start Time (HH:MM)</b>	<p>The time the employee's shift starts.</p> <p>Times round down to 15 minute blocks and can be written as:</p> <ul style="list-style-type: none"> <li>▪ Twelve-hour time with AM and PM, for example 11:45am, or 5:00PM.</li> <li>▪ Twenty-four-hour time, for example 11:00 or 17:00</li> <li>▪ Decimals, for example 11.75 or 5.</li> </ul>
<b>Finish Time (HH:MM)</b>	<p>The time the employee's shift ends.</p> <p>Times round down to 15 minute blocks and can be written as:</p> <ul style="list-style-type: none"> <li>▪ Twelve-hour time with AM and PM, for example 11:45am, or 5:00PM.</li> <li>▪ Twenty-four-hour time, for example 11:00 or 17:00</li> <li>▪ Decimals, for example 11.75 or 5.</li> </ul>
<b>Break Start Time (HH:MM)</b>	<p>The time the employee's scheduled break starts.</p> <p>Times round down to 15 minute blocks and can be written as:</p> <ul style="list-style-type: none"> <li>▪ Twelve-hour time with AM and PM, for example 11:45am, or 5:00PM.</li> <li>▪ Twenty-four-hour time, for example 11:00 or 17:00</li> <li>▪ Decimals, for example 11.75 or 5.</li> </ul>
<b>Break Duration (15 mins Blks)</b>	<p>The number of 15 minute blocks the employee takes as a break. Breaks are scheduled as a single period.</p> <p>For example, if the employee has:</p> <ul style="list-style-type: none"> <li>▪ a half-hour break, their <b>Break Duration</b> is 2 (2 x 15 is 30 minutes)</li> <li>▪ an hour, their <b>Break Duration</b> is 4 (4 x 15 is 60 minutes).</li> </ul>
<b>Full Day Leave?</b>	<p>Select if the employee is rostered for a day of leave.</p>
<b>Total Hours</b>	<p>The total hours the employee is rostered to work this day, excluding</p>

Field	Description
<b>click save to Update</b>	<p>breaks.</p> <p>For example, if the employee is rostered to start at 10:00AM, finish at 4:00pm and has a break duration of 2 (30 minutes), their total hours for the roster entry is 5.5.</p> <div style="border: 1px solid #4F81BD; padding: 5px; background-color: #D9E1F2;"> <p><b>Note:</b> This field is read-only, you cannot update the value manually. If you have changed a roster entry, you must save the roster grid to update the <b>Total Hours</b> field.</p> </div>

## Buttons

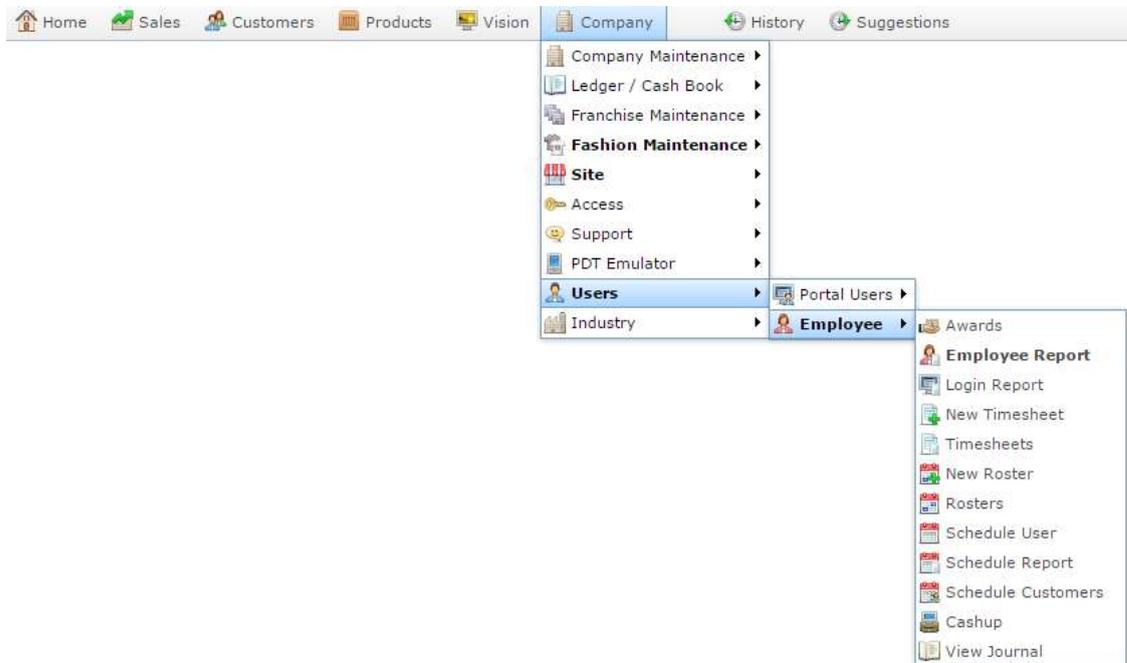
Field	Description
 Save	Save any changes made to the roster and update the <b>Total Hours</b> fields.
 Delete	Clear the selected roster entry.
 Copy	<p>Copy the selected roster entries:</p> <ul style="list-style-type: none"> <li>▪ to the employee selected in the <b>Copy To</b> field</li> <li>▪ at the date selected in the <b>Copy Roster To</b> field.</li> </ul> <p>See <i>Copy a roster</i> on page 89.</p>
 Recurring	Make the currently displayed roster recur for the number of weeks or months selected in the <b>Number of Recurring Weeks / Months</b> field. See <i>Set a roster to recur</i> on page 94.

## View rosters for a specific employee or date

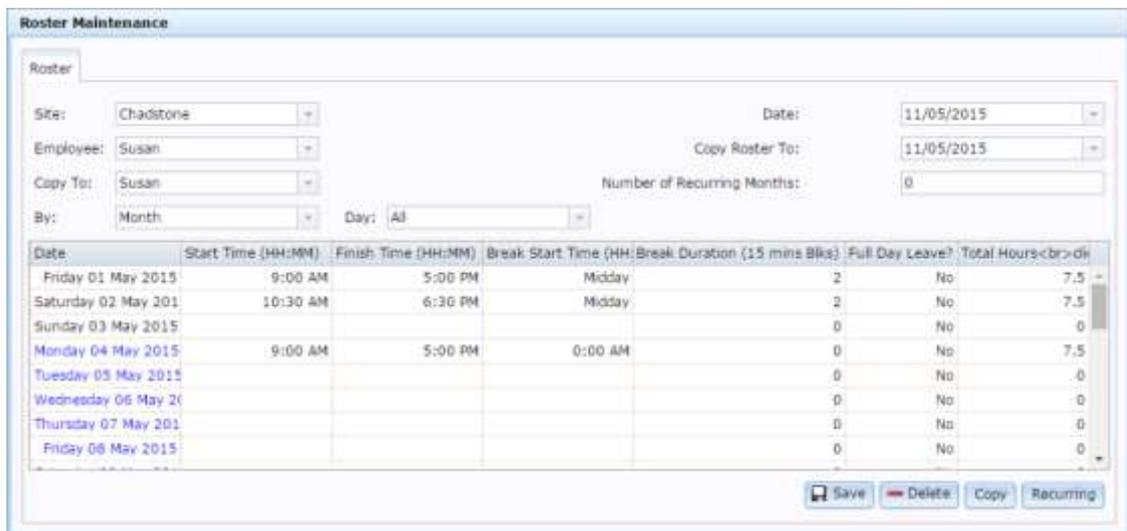
You can view employee's rosters for selected weeks or months.

To view an employee's roster:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > New Roster**.



The Roster Maintenance window is displayed.



3. Select the site the employee belongs to from the **Site** drop-down list.

Roster

Site: Chadstone Date: 11/05/2015

Employee: Susan Copy Roster To: 11/05/2015

Copy To: Susan Number of Recurring Months: 0

By: Month Day: All

4. Select the employee you want to view from the **Employee** drop-down list.

Roster

Site: Chadstone Date: 11/05/2015

Employee: Susan Copy Roster To: 11/05/2015

Copy To: Susan Number of Recurring Months: 0

By: Month Day: All

The employee's roster is displayed.

5. Select the date you want to view in the **Date** drop-down calendar.

Roster

Site: Chadstone Date: 11/05/2015

Employee: Susan Copy Roster To: 11/05/2015

Copy To: Susan Number of Recurring Months: 0

By: Month Day: All

6. Click on another field.

**Note:** The Roster grid updates the date once another field has been selected.

The employee's roster for the selected date is displayed.

See *Rosters Maintenance* on page 77

7. Select if you want to view by **Month** or by **Week** from the **By** drop-down list.

Roster

Site: Chadstone Date: 11/05/2015

Employee: Susan Copy Roster To: 11/05/2015

Copy To: Susan Number of Recurring Months: 0

By: Month Day: All

**Note:** Changing the **By** view also changes how recurring rosters work. See *Set a roster to recur* on page 94.

You can:

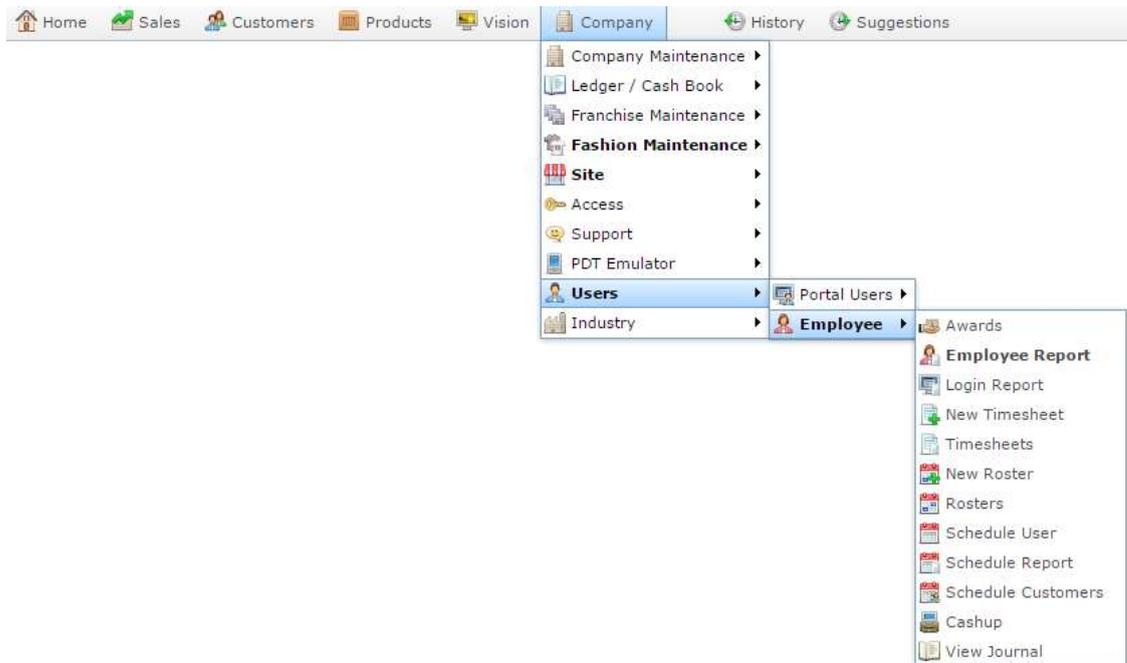
- Add or edit the employee's roster entries. See *Add or edit a roster* on page 86.
- Copy the employee's roster entries to another date. See *Copy a roster* on page 89.
- Set the employee's roster to recur for a selected number of weeks or months. See *Set a roster to recur* on page 94.

## Add or edit a roster

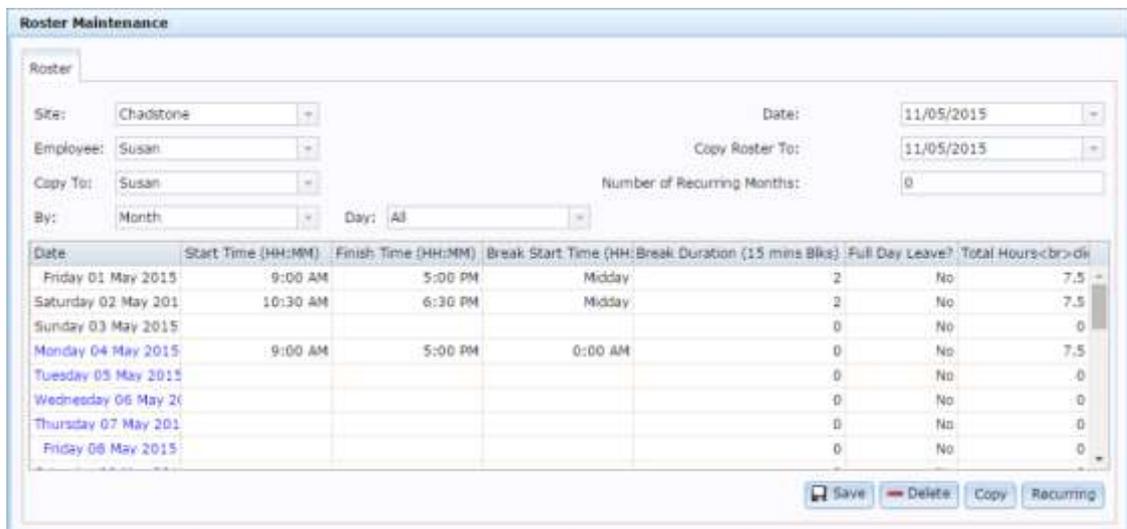
You can add or edit an employee's roster using Roster Maintenance.

To add or edit an employee's roster:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > New Roster**.



The Roster Maintenance window is displayed.



3. Select the site the employee belongs to from the **Site** drop-down list.

4. Select the employee you want to view from the **Employee** drop-down list.

The employee's roster is displayed.

5. Select the date you want to view in the **Date** drop-down calendar.

6. Click on another field.

**Note:** The Roster grid updates the date once another field has been selected.

The employee's roster for the selected date is displayed.

See *Rosters Maintenance* on page 77

7. Select if you want to view by **Month** or by **Week** from the **By** drop-down list.

**Note:** Changing the **By** view also changes how recurring rosters work. See *Set a roster to recur* on page 94.

8. Select the date in the Roster grid where you want to add or edit a roster entry.

**Roster Maintenance**

Roster

Site: Chadstone Date: 11/05/2015

Employee: Susan Copy Roster To: 11/05/2015

Copy To: Susan Number of Recurring Months: 0

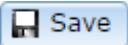
By: Month Day: All

Date	Start Time (HH:MM)	Finish Time (HH:MM)	Break Start Time (HH:MM)	Break Duration (15 mins Blks)	Full Day Leave?	Total Hours
Monday 04 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Tuesday 05 May 2015				0	No	0
Wednesday 06 May 2015	10:00 AM	6:00 PM	1:00 PM	2	No	7.5
Thursday 07 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Sunday 10 May 2015				0	No	0
Monday 11 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Tuesday 12 May 2015				0	No	0
Wednesday 13 May 2015	10:00 AM	6:00 PM	1:00 PM	2	No	7.5

Save Delete Copy Recurring

9. Type the **Start**, **Finish** and **Break Start** times and the **Break Duration** you want to add or edit for this roster date.

See *Rosters Maintenance* on page 77.

10. Click .

**Note:** Unsaved changes are lost if you change the selection fields to show a new view, date or employee. Save your changes often.

The changes are saved and the **Total Hours** fields are updated.

You can also:

- Copy the employee's roster entries to another date. See *Copy a roster* on page 89.
- Set the employee's roster to recur for a selected number of weeks or months. See *Set a roster to recur* on page 94.

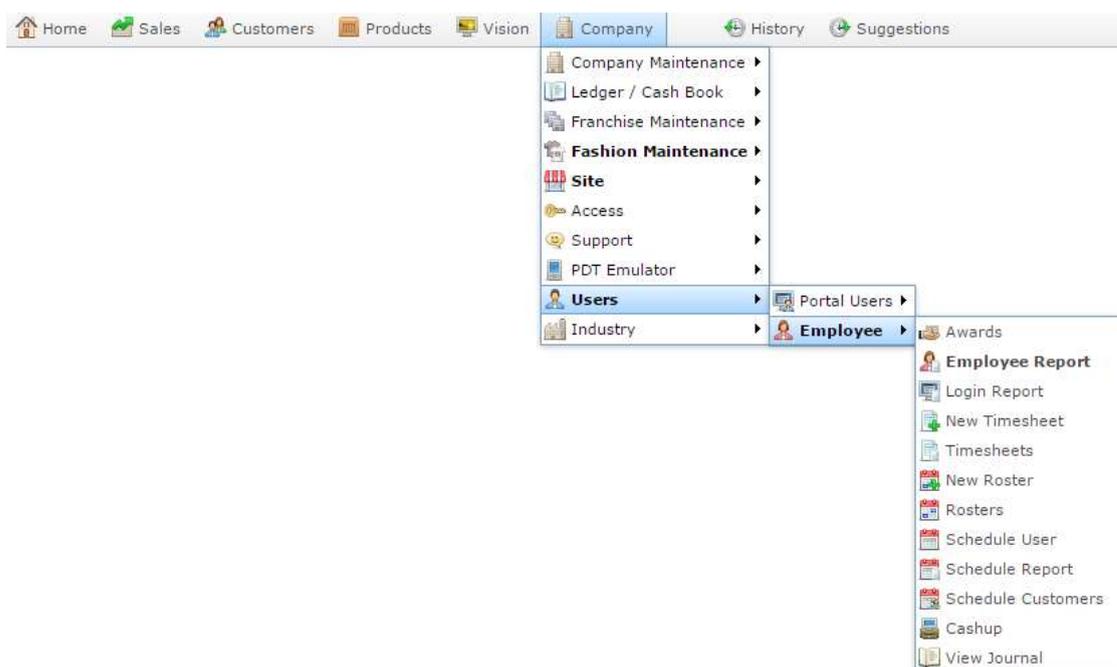
## Copy a roster

You can copy roster entries from one employee to another, or from one date to another for the same employee.

**Note:** If there are existing entries in the roster dates you want to copy to, those entries are overwritten with the copied entries.

To copy a roster entry:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > New Roster**.



The Roster Maintenance window is displayed.

Date	Start Time (HH:MM)	Finish Time (HH:MM)	Break Start Time (HH:MM)	Break Duration (15 mins Blks)	Full Day Leave?	Total Hours
Friday 01 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Saturday 02 May 2015	10:30 AM	6:30 PM	Midday	2	No	7.5
Sunday 03 May 2015				0	No	0
Monday 04 May 2015	9:00 AM	5:00 PM	0:00 AM	0	No	7.5
Tuesday 05 May 2015				0	No	0
Wednesday 06 May 2015				0	No	0
Thursday 07 May 2015				0	No	0
Friday 08 May 2015				0	No	0

3. Select the site the employee belongs to from the **Site** drop-down list.

4. Select the employee you want to view from the **Employee** drop-down list.

The employee's roster is displayed.

5. Select the date you want to view in the **Date** drop-down calendar.

6. Click on another field.

**Note:** The Roster grid updates the date once another field has been selected.

The employee's roster for the selected date is displayed.

See *Rosters Maintenance* on page 77

7. Select if you want to view by **Month** or by **Week** from the **By** drop-down list.

Roster

Site:	Chadstone	Date:	11/05/2015
Employee:	Susan	Copy Roster To:	11/05/2015
Copy To:	Susan	Number of Recurring Months:	0
By:	Month	Day:	All

**Note:** Changing the **By** view also changes how recurring rosters work. See *Set a roster to recur* on page 94.

- Select the roster entries in the Roster grid you want to copy.

**Roster Maintenance**

Roster

Site: Chadstone Date: 11/05/2015

Employee: Susan Copy Roster To: 11/05/2015

Copy To: Susan Number of Recurring Months: 0

By: Month Day: All

Date	Start Time (HH:MM)	Finish Time (HH:MM)	Break Start Time (HH:Break Duration (15 mins Blks))	Full Day Leave?	Total Hours
Monday 04 May 2015	9:00 AM	5:00 PM	Midday	2	No 7.5
Tuesday 05 May 2015				0	No 0
Wednesday 06 May 2015	10:00 AM	6:00 PM	1:00 PM	2	No 7.5
Thursday 07 May 2015	9:00 AM	5:00 PM	Midday	2	No 7.5
Sunday 10 May 2015				0	No 0
Monday 11 May 2015				0	No 0
Tuesday 12 May 2015				0	No 0
Wednesday 13 May 2015				0	No 0

Save Delete Copy Recurring

- Select the employee whose roster you want to copy the entries to from the **Copy to** drop-down list.

Roster

Site: Chadstone Date: 11/05/2015

Employee: Susan Copy Roster To: 11/05/2015

Copy To: Susan Number of Recurring Months: 0

By: Month Day: All

**Note:** You can copy an employee's entries to their own roster by selecting the same employee for both the **Employee** and **Copy To** drop-down lists.

- Select the date you want the copied entries to appear from the **Copy Roster To** drop-down calendar.

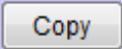
Roster

Site: Chadstone Date: 11/05/2015

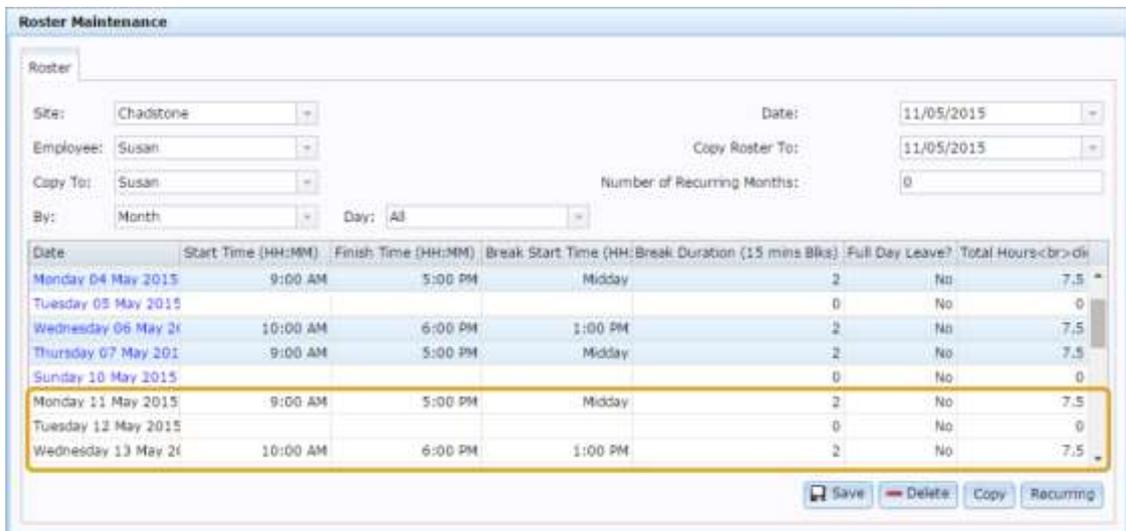
Employee: Susan Copy Roster To: 11/05/2015

Copy To: Susan Number of Recurring Months: 0

By: Month Day: All

11. Click .

The roster entries are copied to the **Copy Roster To** date.



The screenshot shows the 'Roster Maintenance' window. At the top, there are fields for 'Site' (Chadstone), 'Employee' (Susan), 'Copy To' (Susan), 'By' (Month), 'Day' (All), 'Date' (11/05/2015), 'Copy Roster To' (11/05/2015), and 'Number of Recurring Months' (0). Below these fields is a table with the following columns: Date, Start Time (HH:MM), Finish Time (HH:MM), Break Start Time (HH:MM), Break Duration (15 mins Blks), Full Day Leave?, and Total Hours. The table contains the following data:

Date	Start Time (HH:MM)	Finish Time (HH:MM)	Break Start Time (HH:MM)	Break Duration (15 mins Blks)	Full Day Leave?	Total Hours
Monday 04 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Tuesday 05 May 2015				0	No	0
Wednesday 06 May 2015	10:00 AM	6:00 PM	1:00 PM	2	No	7.5
Thursday 07 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Sunday 10 May 2015				0	No	0
Monday 11 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Tuesday 12 May 2015				0	No	0
Wednesday 13 May 2015	10:00 AM	6:00 PM	1:00 PM	2	No	7.5

At the bottom right of the table, there are buttons for 'Save', 'Delete', 'Copy', and 'Recurring'.

**Note:** If you select a non-consecutive block of roster entries to copy, as in the example above, the number of days between roster entries is still preserved when copying.

You can also:

- Add or edit the employee's roster entries. See *Add or edit a roster* on page 86.
- Set the employee's roster to recur for a selected number of weeks or months. See *Set a roster to recur* on page 94.

## Set a roster to recur

Set a roster to recur if you want to repeat an existing roster for a number of weeks or months. You can set a roster to recur on a monthly or weekly basis by selecting a **Weekly** or **Monthly** view from the **By** drop-down list. You should use:

- The **Weekly** view if you want the roster entries to appear on the same day of the week.

For example, Monday's entry always appears on the Monday of each recurring week, regardless of what date it is.

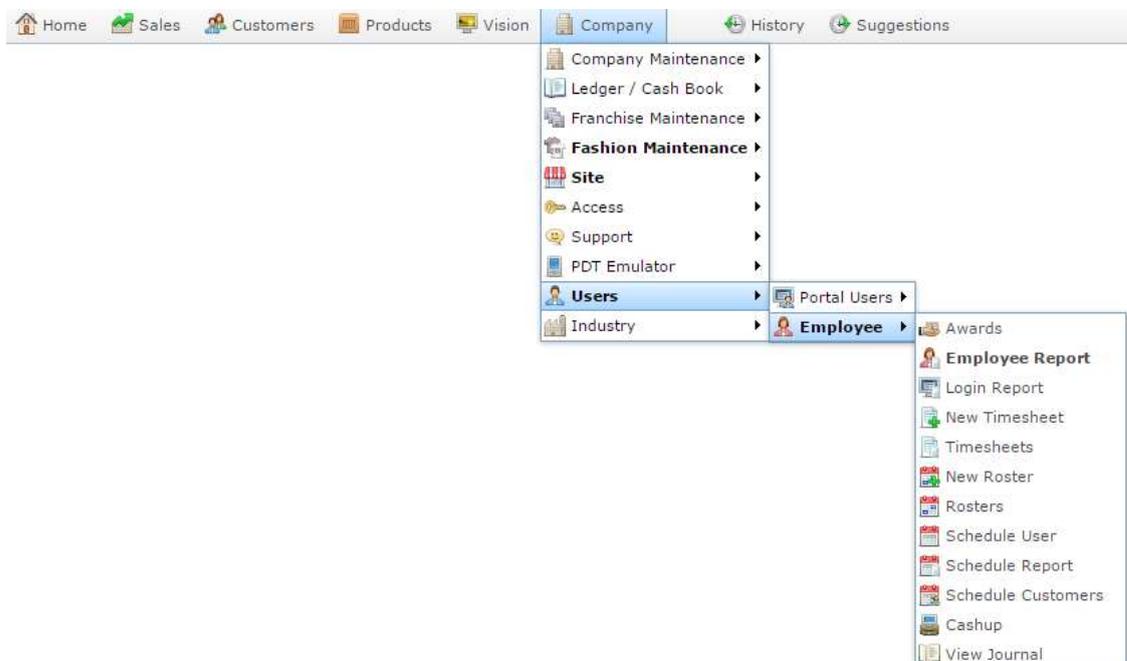
- The **Monthly** view if you want the roster entries to appear on the same date of the month and ignore what day of the week it is.

For example, the entry for the first of the month always appears on the first of each recurring month, regardless of what day of the week it is.

**Note:** Choose your recurrence type based on whether your rosters repeat on dates or on days of the week, not based on how long you want a roster to recur. For example, if you roster your employees on a weekly basis and you want the roster to recur for three months, count the number of weeks you need and use a weekly recurrence.

To set a roster to recur:

1. Press  **Company** in the main menu bar.
2. Press **Users > Employee > New Roster**.



The Roster Maintenance window is displayed.

Date	Start Time (HH:MM)	Finish Time (HH:MM)	Break Start Time (HH: Break Duration (15 mins Blks))	Full Day Leave?	Total Hours
Friday 01 May 2015	9:00 AM	5:00 PM	Midday	2	No 7.5
Saturday 02 May 2015	10:30 AM	6:30 PM	Midday	2	No 7.5
Sunday 03 May 2015				0	No 0
Monday 04 May 2015	9:00 AM	5:00 PM	0:00 AM	0	No 7.5
Tuesday 05 May 2015				0	No 0
Wednesday 06 May 2015				0	No 0
Thursday 07 May 2015				0	No 0
Friday 08 May 2015				0	No 0

3. Select the site the employee belongs to from the **Site** drop-down list.

4. Select the employee you want to view from the **Employee** drop-down list.

The employee's roster is displayed.

5. Select the date you want to view in the **Date** drop-down calendar.

6. Click on another field.

**Note:** The Roster grid updates the date once another field has been selected.

The employee's roster for the selected date is displayed.

See *Rosters Maintenance* on page 77

- Select if you want your roster to recur by **Month** or by **Week** from the **By** drop-down list.

The screenshot shows the 'Roster Maintenance' form. The 'By' dropdown menu is highlighted with a yellow box and set to 'Week'. The form includes fields for Site (Chadstone), Employee (Susan), Copy To (Susan), Date (11/05/2015), Copy Roster To (11/05/2015), and Number of Recurring Weeks (0). Below these fields is a table with the following data:

Date	Start Time (HH:MM)	Finish Time (HH:MM)	Break Start Time (HH:MM)	Break Duration (15 m)	Full Day Leave?	Total Hours
Monday 11 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Tuesday 12 May 2015				0	No	0
Wednesday 13 May 2015	10:00 AM	6:00 PM	1:00 PM	2	No	7.5
Thursday 14 May 2015	9:00 AM	5:00 PM	Midday	2	No	7.5
Friday 15 May 2015				0	No	0
Saturday 16 May 2015				0	No	0
Sunday 17 May 2015				0	No	0

At the bottom right of the form are buttons for Save, Delete, Copy, and Recurring.

- Type the number of weeks or months you want the roster to repeat in the **Number of Recurring Weeks / Months** field.

**Note:** Any existing roster entries within the recurring period are overwritten by the recurring roster.

This screenshot shows the same 'Roster Maintenance' form as above, but the 'Number of Recurring Weeks' field is highlighted with a yellow box. The value is currently 0.

- Click **Recurring**.

The roster entries are repeated for the selected number of weeks or months.

**Tip:** If you want to check that your rosters are correct, you can change the date or switch to the **Monthly** view. See *View rosters for a specific employee or date* on page 84.

You can also:

- Add or edit the employee's roster entries. See *Add or edit a roster* on page 86.
- Copy the employee's roster entries to another date. See *Copy a roster* on page 89.

# Glossary

## Account

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

## Aged balance

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

## Balance

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

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

## Barcode

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

## Batch (kit manufacture)

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

## Batch (stock take)

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

## Brand

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

## Company

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

## Complete Order

A customer order is complete when:

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

## Contract

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

## Controlled purchase order / Controlled requisition

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

## Cost matrix / price matrix

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

A price matrix can be:

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

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

## Credit adjustment

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

## Credit limit

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

## Credit note

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

## Creditor

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

## Creditor payment

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

## Cross-reference

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

## Colour

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

## Customer

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

## Debit adjustment

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

## Delivery docket

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

## Department

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

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

## Department promotion

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

## Discount

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

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

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

Per-unit discounts can:

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

Per-line discounts can:

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

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

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

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

## Division

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

## DSD

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

## Employee

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

## Fashion

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

## Fixture

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

## Group promotion

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

## Group purchase order

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

## Inventory

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

## Invoice

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

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

## Inter-branch transfers (IBT)

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

## Item

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

- Barcode.

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

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

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

## Item options

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

## Item variation

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

## Journal

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

## Kit

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

## Label

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

## Ledger

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

## Ledger type

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

## Line minimum

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

## Manufactured Kit

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

## Matching

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

## Menu area

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

## Modifier item

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

## Open transaction

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

## Operator

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

## Pack

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

## Pallet

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

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

## Payment terms

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

## **PDT**

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

## **Portal Data Interchange (PDI)**

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

## **Permission**

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

## **Portal operator**

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

## **Point of Sale operator**

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

## **Point of Sale supervisor**

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

## **Price change**

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

## **Price level**

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

## **Prime item**

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

## **Procurement**

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

## **Promotion**

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

## **Promotion group**

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

## **Purchase order**

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

## **Rebate**

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

## **Rebate group**

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

## **Rebate item group**

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

## **Receipt**

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

## Referral

A referral is a connection between two items in your inventory, where one is considered part of the other. For example, if your inventory tracks both individual cans of softdrink 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 softdrink and crates of 24 cans and sells the cans individually, the referred item is the crate of cans, which is depleted every time an individual can is sold. Referred items are also called Stock items in this documentation.

## Requisition

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

## Roster

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

## Sale minimum

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

## Selling item

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

## Size

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

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

## **Snap count**

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

## **Special**

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

## **Stock adjustment / write-off**

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

## **Stock item**

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

## **Stock on hand**

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

## **Stock receipt**

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

## **Stock return**

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

## **Stock take**

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

## Style

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

## Supplier

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

## Supplier promotion

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

## Terminal

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

## Point of Sale Transaction

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

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

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

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

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

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

## Transaction line

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

Chicken Drum/stk 6 583kg N x \$2.99/kg	\$19.68
Crown Lamb Roast 1.426kg N x \$12.99/kg	\$18.52
<b>Total:</b>	<b>\$38.20</b>
Credit Card	\$20.00
CASH	\$50.00
Change	\$31.80

## 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.