

# Admin POS

Most POS Codes are optional and work in conjunction with options taken or set in System and Station Defaults. If you decide to use a particular type of POS code, you will need to set up the required codes in this area and then enable the use of those codes within System or Station Defaults.

E.g. If you decide to enable Operator Codes, you will first need to set up your actual operator names and access levels and then enable these in System Defaults, Details 1.

To access POS Codes:

- 1) Select Alt A Admin from the Main Menu
- 2) Select F6 POS from the Admin Menu

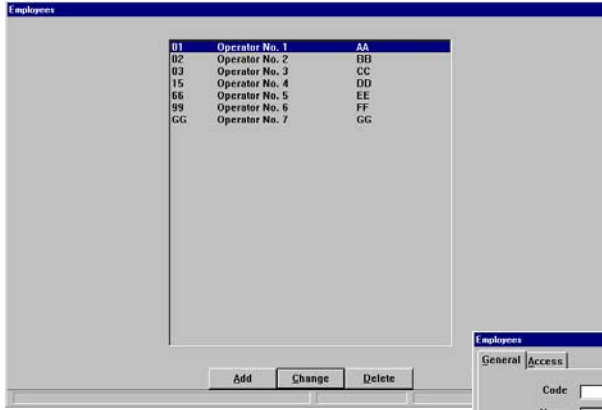


POS codes are grouped under these menu options

- Operator Codes - Names and access levels of you and your staff.
- Tender Types - Types of tenders (cash, EFTPOS, Gift Vouchers etc.), and controls for end of day reporting.
- Discount Codes - Reasons for giving customer discounts.
- Credit Reasons - Reasons for taking returns or exchanges from customers.
- SOH Adjustment Codes - Reasons for adjusting stock on hand quantities.
- Void / No Sale Codes - Reasons for voiding a transaction or opening the cash drawer.
- Foreign Currency - Names and exchange rates for any foreign currency that you may accept.
- Layby Details - Layby conditions that will be printed on customer layby docketts.
- Voucher Types - Controls for different types of Gift Vouchers.

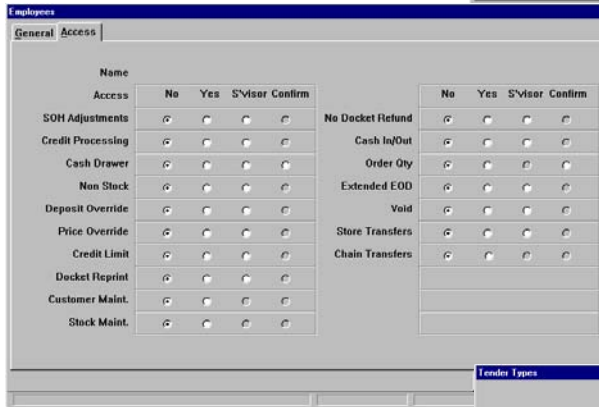
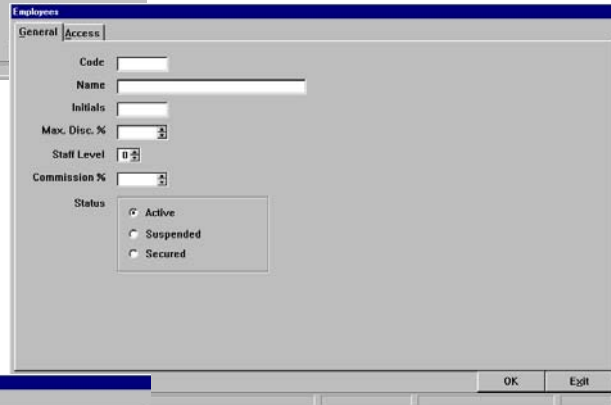


Maintenance to the POS Codes may be performed from any workstation although changes will not become active on other stations until WinSTORE is closed and restarted on those stations.



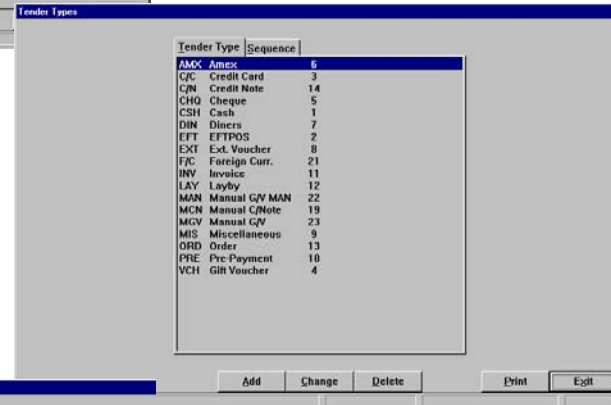
Operators

Operators - General

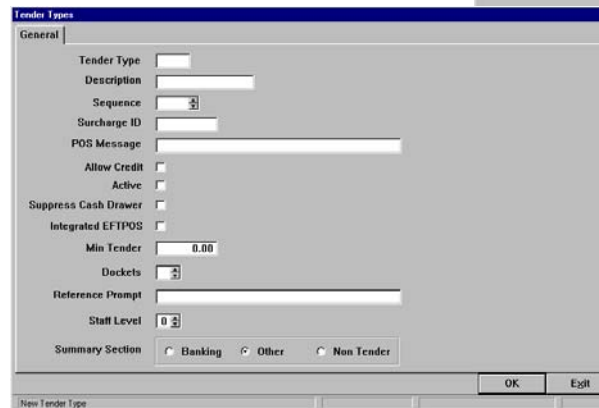


Operators - Access

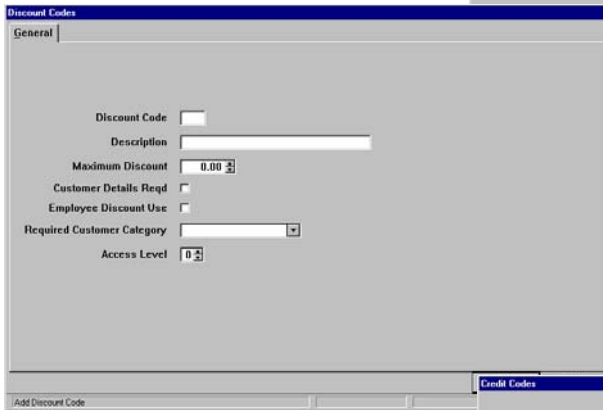
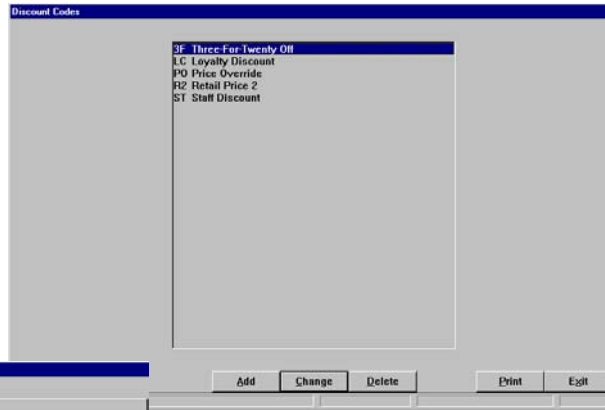
Tender Types



Tender Types - General

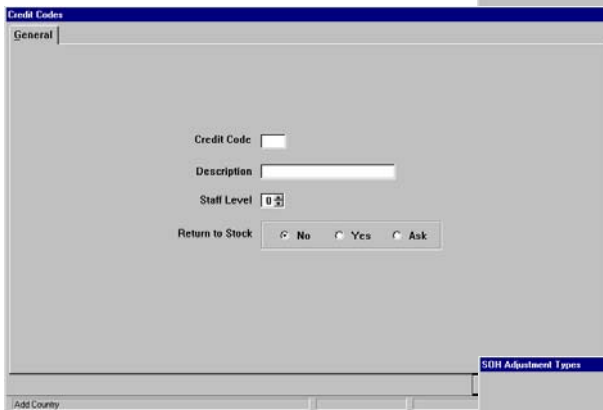
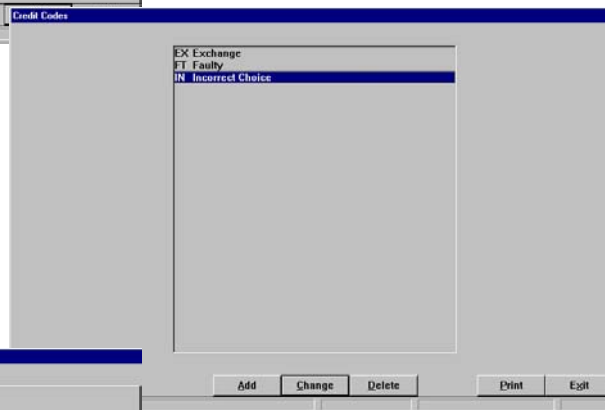


## Discount Codes



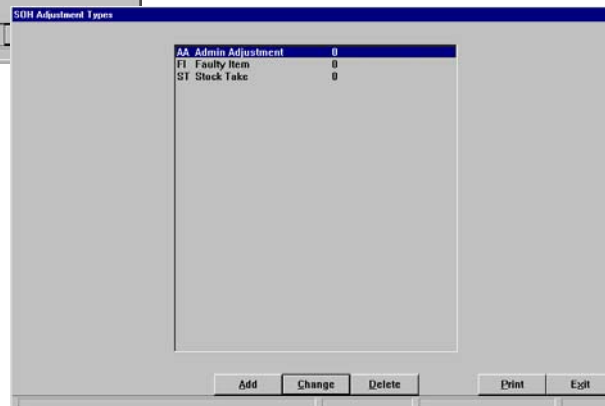
## Discount Codes - General

## Credit Reasons



## Credit Reasons - General

## SOH Adj. Codes



SOH Adjustment Types  
General

SOH Adjustment Type

Description

Staff Level

Order Placement Update  No  Yes  Ask

OK Exit

Add SOH Adjust Code

SOH Adj. Codes - General

Void / No Sale Types

Type	Code	Description	Level
N	IC	Incorrect Change Given	1
V	IT	Incorrect Transaction	0

Add Change Delete Print Exit

Void/ No Sale Codes

Void / No Sale Types  
General

Type  Void  No Sale

Code

Description

Staff Level

OK Exit

Add Reason Code

Void/ NoSale - General

Foreign Currency

Currency	Exchange Rate	Date Set	DP
NZD	1.3300	22/06/2000	2
USD	0.5500	17/10/2000	2
	0.0000	/ /	0

Add Change Delete Print Exit

Foreign Currency

Line	Tab	Point	Text
1	1	1.	Payments must be made weekly.
2	1	2.	20% fee charged on cancellations.
3	1	3.	Expired laybys will be cancelled after 7 days notice in writing.
4	5		
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			

Layby Conditions

Layby - Terms

Layby Conditions

General

Payment Frequency

None

Weekly

Fortnightly

Monthly

Quarterly

No. of Payments

OK Exit

Voucher Types

A	Store Voucher
I	Insurance
L	Leading Edge
M	Westfield Voucher

Add Change Delete Print Exit

Voucher Types

Voucher Types - General

Voucher Types

General

Voucher Type

Description

Gift Voucher Style  Manual  Automatic

Expiry Months

Accept Vouchers  None  Valid Only  All

Partial Redemption

Disallow  New  Ask (Same)

Reduce  Change  Ask (C/Note)

Credit Note  Account

Maximum Change

Priority

Status  Active  Not In Use

OK Exit

Add Voucher Type

## ***POS Codes - Operators***

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Operator Codes are used to gain access to any function within WinSTORE. If enabled, any transaction performed will record the operators initials into the transaction log along with the details of the transaction. Any transaction can then be traced to the original operator. Operator reports may also be generated. Using Operator Codes also allows access restrictions to be set so that only certain operators may have access to certain areas or functions.

To Access Operator Codes:

- 1) Select Alt A Admin from the Main Menu
- 2) Select F6 POS from the Admin Menu
- 3) Select F2 Operators

On accessing Operators, a list of all current operators is displayed. Select from the available action buttons to maintain the Operator codes. To Change or Delete details of an existing operator, highlight the required operator before selecting the action button.

<b>Add</b>	Select to create a new operator
<b>Change</b>	Highlight an existing operator and select Change to alter the details of that operator.
<b>Delete</b>	Highlight an existing operator and select Delete to remove that operator completely.
<b>Print</b>	Prints a list of existing operators including their codes, names, Initials, Maximum discount allowed and security level.
<b>Exit</b>	Select to return to the main Admin menu

After selecting Add or Change, two tabs of information are then available for maintenance.

## ***Operators - General Tab***

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### ***Code***

This is the code the operator will input to access WinSTORE functions. The length of this code is determined by the Operator ID length field which is set within System Defaults-Details 1. The code length must be the same for all operators. This code can be made up of any valid alphanumeric characters in any combination.

### ***Name***

The name of the operator who will be using this code.

### ***Initials***

The Initials of the operator. Operator initials are displayed throughout WinSTORE to identify who completed a transaction in areas such as the Transaction Log, on the sales screen (optional), on customer receipts (optional) and on various reports.

### ***Max. Disc %***

Set the maximum discount percentage that the operator is able to apply to a sale. This percentage may be equal to or less than, but may not exceed the Max Discount % allowable as set within System Defaults, Details 1.

## ***Staff Level***

Staff Levels play a prominent role in the security infrastructure of WinSTORE. Functions and menu options may be restricted to allow access to only those operators with the appropriate staff levels. Levels range from the lowest level of 0, to the highest level of 9. Only those operators with level 9 may set access restrictions for other operators of lower levels.

Throughout WinSTORE, functions and menus are accessed by use of the menu buttons located down the right side of the screen. Each and every one of these buttons on all menus may have an access restriction through the allocation of staff levels.



An operator level 9 is required to alter the menu button access level.

To alter access level on any menu button:

- 1) With the mouse, place the cursor over the menu button to be maintained.
- 2) Click the right mouse button  
    ☛ Properties option is then available
- 3) Left click (normal click) the Properties\* option  
    ☛ A "Change Function Keys Properties" box opens
- 4) Select the staff level required for this function.

\* Within the Properties option, Text spelling, Text colour and button colour are also able to be altered. Any changes to the menu buttons should be considered thoroughly before undertaken especially in regard to changing the text of a menu button. Changing the button text is hazardous as instructions relating to the menu button's function may become difficult, if not impossible to be followed. In the case of a virus or the like occurring, renamed buttons could slow the process of re-enabling WinSTORE.

## ***Commission %***

If commissions are paid, input the commission percentage entitled to the operator. This percentage is the percentage of the total gross profit dollars that is paid to the operator. Leave blank if this field is not relevant.

## ***Status***

Active

Suspended

Secured

## ***Operators - Access Tab***

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Over and above access levels, certain specific functions may be restricted or disallowed for each individual operator.

No	The operator can not perform / access this function
Yes	The operator can perform / access this function
Supervisor	The operator can perform / access this function but another operator with full access must authorisation the transaction
Confirm	The operator can perform / access this function but requires any other operator to authorise.

### ***SOH Adjustments***

Used for correcting the stock on hand quantity of an item when it is found to be wrong for no apparent reason.

### ***Credit Processing***

Customer refunds and exchanges.

### ***Cash Drawer***

Opening of the cash drawer (no sale) independently of processing a transaction.

### ***Non Stock***

A non-stock sale is where a product is not recorded in the system and the operator is required to type in the detail of the product to record the sale.

### ***Deposit Override***

Decreasing of the minimum deposit requirements of customer orders, laybys and invoices as set in System Settings. Any operator may increase a deposit.

### ***Price Override***

Overriding (F10) prices at point of sale where the retail is incorrect.

### ***Credit Limit***

Exceeding a customers credit limit as set in the customers account details.

### ***Docket Reprint***

Reprinting the last sales docket.

### ***Customer Maint.***

Editing of customer details. Any Operator may add new customers.

### ***Stock Maint.***

Editing of existing stock details or creation of new stock items. Any Operator may create new stock within the Receive Orders facility.

### ***No Docket Refund***

In conjunction with Credit Docket Required in System Defaults-Details 1. If a credit docket is not required in System Defaults, this setting is irrelevant.

### ***Cash in / Out***

Petty cash transactions.

### ***Order Qty***

Alteration or input of order quantities within Place Orders.

### ***Extended EOD***

Previous days Activity (EOD) Summaries.

### ***Void***

Void processing.

### ***Store Transfers***

Relevant only to Multistore installations. Stock transfers to and from own store.

### ***Chain Transfers***

Relevant only to Multistore installations. Stock transfers to or from any store. .



## ***POS Codes - Tender Types***

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Any tender type that may be applicable can be created and maintained.

To Access Tender Types:

- 1) Select Alt A Admin from the Main Menu
- 2) Select F6 POS from the Admin Menu
- 3) Select F3 Tender Types

All Tender Types are displayed. They may be sorted alphabetically or by sequence. The sequence is the order in which they will appear list at point of sale.

<b>Add</b>	Create a new tender type
<b>Change</b>	Alter an existing tender type
<b>Delete</b>	Remove an existing tender type
<b>Print</b>	Print a list of the tender types including Code, Sequence, Surcharge ID, Credit allowance, and POS message
<b>Exit</b>	Return to the admin menu

## ***Tender Types - General Tab***

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### ***Tender Type***

A 3 digit code to represent the Tender Type.

### ***Description***

The description or name of the tender type.

### ***Sequence***

The sequence in which the tender type will appear at the completion of a sales transaction. Cash would normally be set to 1.

### ***Surcharge ID***

Allows the input of a surcharge stock ID to be applied after this Tender Type has been selected. If used, a value only stock item must be created to track the use of this surcharge. Leave blank if no surcharge is to be applied.

### ***POS Message***

Input a message which will be displayed at POS when this Tender Type is selected. Leave blank if no message is required.

### ***Allow Credit***

Determines whether this tender type is valid for a credit refund (F6). Leave blank if this tender type is not refundable.

### ***Active***

Enables the use of this tender type. Leave blank if the tender type is not available for use.

### ***Suppress Cash Drawer***

Determines whether the cash drawer is to be suppressed (not opened) when this tender type is selected.

### ***Integrated EFTPOS***

Determines the style of EFTPOS in use. EFTPOS integration is only available with certain banking institutions, contact your software vendor for more information.

### ***Min Tender***

Set the minimum dollar value allowed (if any) for this tender type.

### ***Dockets***

Set the number of dockets to be printed when this tender type is used. In conjunction with printer settings in Station Defaults-Printing.

### ***Reference Prompt***

If any text is entered in this field, a prompt box will open at POS after this tender type has been selected requesting input of a reference.

### ***Staff level***

Operator access level required to use this tender type.

### ***Summary Section***

Determines where in the EOD Activity Summary that this tender will be placed.

Banking All bankable tenders, e.g., cash, EFTPOS, credit cards

Other Physical tenders, not banked, e.g., gift vouchers

Non Tender System tenders, e.g., layby, order, invoice.

## ***POS Codes - Discount Codes***

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These codes are a list of reasons for an operator to choose from when applying a discount to a sale. To use these codes you must first create these reason codes and then enable their use in System Settings, Details 1.

### ***Discount Code***

A 2 digit code to represent this reason.

### ***Description***

The description or name of the discount type.

### ***Maximum Discount***

The maximum discount percentage allowable for this reason.

### ***Customer Details Reqd***

Forces the operator to input or select the customers details when this reason code is selected.

### ***Employee Discount Use***

Assist with restricting the number of discounted purchases that your operators may purchase for themselves (staff discount). In conjunction with Customer Codes - Categories and the next option, Required Customer Category.

### ***Required Customer Category***

Restrict the use on this Discount Code to only one Customer Category, e.g. Employees.

### ***Access Level***

Operator access level required to use this reason.

## ***POS Codes - Credit Reasons***

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Reason codes for an operator to select from when completing a refund or exchange or issuing a credit note or credit voucher for a customer.

### ***Credit Code***

A 2 digit code to represent this reason.

### ***Description***

The description or name of this reason.

### ***Staff Level***

The Operator access level required to use this reason.

### ***Return to Stock***

Determines if the returned stock is to be placed back into store stock when this reason is selected.

## ***POS Codes - SOH Adjustment Codes***

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These Codes will allow a more detailed view of why a SOH adjustment was conducted, resulting in increased control over stock figures and greater security in regard to the processing of SOH Adjustments.

### ***SOH Adjustment Type***

A 2 digit code to represent this reason.

### ***Description***

The description or name of this reason.

### ***Staff Level***

The Operator access level required to use this reason.

### ***Order Placement Update***

Determines if the item(s) will be put into Place Orders for reordering.

## ***POS - Void / No Sale Types***

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These codes allow a more detailed view of why a Void or no Sale was conducted, resulting in increased control over sales transactions and greater security in regard to the access of the cash drawer.

### ***Void / No Sale Code***

Select which action this reason is to be used for.

### ***Code***

A 2 digit code to represent this reason.

### ***Description***

The description or name of this reason.

### ***Staff Level***

The Operator access level required to use this reason.

## ***POS Codes - Foreign Currency***

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Should you require acceptance of any foreign currency, here you can maintain currency types and exchange rates to convert these currencies to local currency. All foreign exchange rates should be updated daily to ensure accuracy. To add a currency or change an exchange rate, select the appropriate Action Button. The entire Foreign Currency table will then become active allowing any changes to be performed.

Currency	The currency type, e.g., US, AU etc.
Exchange Rate	The current exchange rate
Date Set	The date the exchange rate was entered
DP	Number of decimal points of the currency

## ***POS Codes - Layby Details***

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Allows the set up of details to be printed on the foot of customer layby receipts if required.



These details do not control laybys, their use is purely for the printing of details on the customer receipt. Layby details will only print on dockets if "Print Conditions" has been selected on the System Settings, Customer Tab.

By selecting the Change Action Button, existing layby details may be altered or new details entered. Use the arrow keys to move between fields and the enter key to save entries.

Line	The line number where the text will appear on the receipt
Tab	The number of spaces in from the left that the first character will be printed.
Point	Insert a number (e.g. 1.), to number each condition.
Text	The text for the condition.

Select the Test Print button to send a sample print to the attached docket printer. This prints the layby details only.

Select the Terms Action Button

This allows setting the payment frequency and number of payments to be made on the layby. If this option is selected and set, these terms will print on the layby receipt along with the calculation of the layby payment amount.

### ***Payment Frequency***

Nominate the frequency of each layby payment. This will calculate the payment amount required to pay off the layby within the terms of the layby.

### ***No. Of Payments***

Nominate the number of payments to be made on the layby. This is used along with the payment frequency to calculate the payment amount required to pay off the layby within the specified time.

## *POS Codes - Voucher Types*

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If, in System Defaults, you have selected 'Multiple' vouchers types, here you maintain what those voucher types are and different controls for each.

### *Voucher Type*

A single digit code to represent the voucher type, e.g., L for Leading Edge, A for Automatic Numbered, M for Manual Numbered etc.

### *Description*

The name of the voucher type.

### *Gift Voucher Style*

Manual            The number is entered manually from a pre-numbered voucher  
Automatic        The number is automatically generated by the system.

### *Expiry Months*

The number of months from the date of issue to the date of expiry.

### *Accept Vouchers*

None              This voucher type may not be redeemed  
Valid Only        Expired Voucher are unable to be redeemed.  
All                 Expired Vouchers may be redeemed although a warning will be given that the voucher has expired.

### *Partial Redemption*

Determines the action if the voucher being redeemed is greater in value than the total value of the items being purchased.

Disallow         Vouchers must be fully redeemed.  
Reduce            The value of the voucher is reduced to the remaining amount.  
Credit Note      A Credit Note is issued for any change  
New                The voucher is fully redeemed and a new voucher is issued for the difference in value.  
Change            Cash change is given for the difference in value up to the set maximum change value allowed (see setting below).  
Account           The voucher is fully redeemed and the value difference is credited to a customer account.  
Ask (Same)        The operator is prompted to nominate which redemption methods is to be used. Mark voucher down, **issue new voucher**, give change, sell more items or transfer to account.  
Ask (C/Note)      The operator is prompted to nominate which redemption methods is to be used. Mark voucher down, **issue credit voucher**, give change, sell more items or transfer to account.

### *Maximum Change*

The maximum change that can be given when the partial redemption option is Change and the voucher value is greater than the total of the items being purchased.

### *Priority*

The order in which the Types will appear in the selection box when sold.

### *Status*

Enable or disable voucher type.