

# **Portal User Guide**

Customers, Laybys And Customer Orders

Copyright © 2016 AMC Convergent IT This work is copyright and may not be reproduced except in accordance with the provisions of the Copyright Act Published: Wednesday, 13 July 2016

## Contents

Configuring your company for customer orders4
Configuring your company for customer relations management
Configuring creditor contracts for your site
Managing document templates16
Creating a new template17
Editing a template description21
Editing a template layout23
Deleting a template
Template Maintenance screen
Template Editor screen
Templates report
Managing customer orders
Creating a new customer order
Finding a customer order47
Editing customer orders
Adding items to orders54
Editing items in orders57
Removing items from orders60
Finalising a customer order64
Deleting a customer order66
Customer Orders screen
Customer Order report
Customer Order Summary report
Picking List report
Preparation List report
Managing customer contact
Creating a new customer management record96
Finding a customer
Customer Maintenance screen
Editing a customer management record114
Customer Contact report
Customer Name and Address Extract report
Managing customers
Creating a new customer
Editing a customer

Customer Maintenance screen	130
Site Details report	145
Home Shopping Department report	150
Managing laybys	153
Editing a layby	154
Adding items to a layby	156
Changing the price of items in a layby	159
Editing the quantity of items in a layby	162
Removing items from a layby	165
Delivering a layby	168
Cancelling a layby	
Customer Lay-by screen	172
Customer Layby report	
Layby Customer Details report	186
Glossary	190

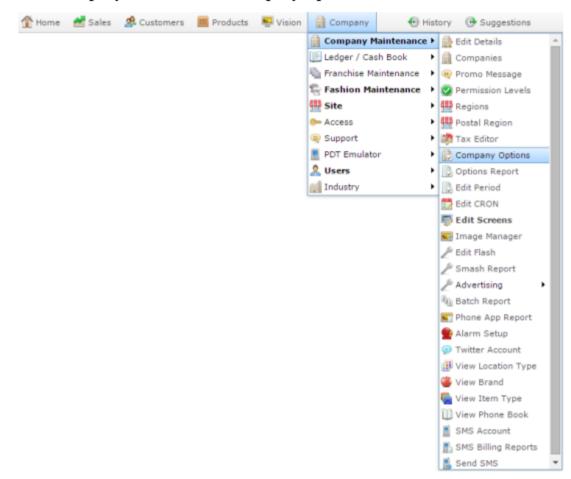
#### **Configuring your company for customer orders**

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

#### **Opening the Company Options - Customer Orders section**

To open the Company Options - Customer Orders section:

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



The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.

Options Maintena	ance			
Company: Examp	ole Company			
Configuration				
Group:	Portal	*		
Section:	Artist	*		
Name		Value	Description	
Artist Label		Artist	Set to to match company requirements	~
CD Label Label		CD Label	Set to to match company requirements	
Catalog Label		Catalog	Set to to match company requirements	
Release Date Lab	oel .	Release Date	Set to to match company requirements	
Title Label		Title	Set to to match company requirements	
			Q Update - Del	ete
				_

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

The Customer Orders section is displayed.

Configuration			
Group:	Portal	*	
Section:	Customer Orders	*	
Name		Value	Description
Allow Delivery		False	Set to enable delivery date selection
Enable Installe	r	True	Set to enable the customer orders to to have installers assigned
Enable Shading	3	False	Set to enable the customer orders to be alternated shading
Enable Top / Bo	ottom Headers	True	Set to enable the customer orders to have top and bottom headers
Installer Lock		True	Set to enable installer to see only thier assigned orders
Letterhead Gag	Þ	3	Set to enable the customer orders to have area at top for Letterhead in mm
Logo		Illusion-Fires2.jpg	Set logo for customer orders
Logo Enable		True	Set to enable the customer orders to use a logo
Logo Position		0	Set justification of logo in customer orders 0 = left, 1 = centre, 2 = right
Logo Width		200	Set width of logo in customer orders
Print Finalised		False	Set to enable the customer orders to print "Finalised" for finalised orders

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

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

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

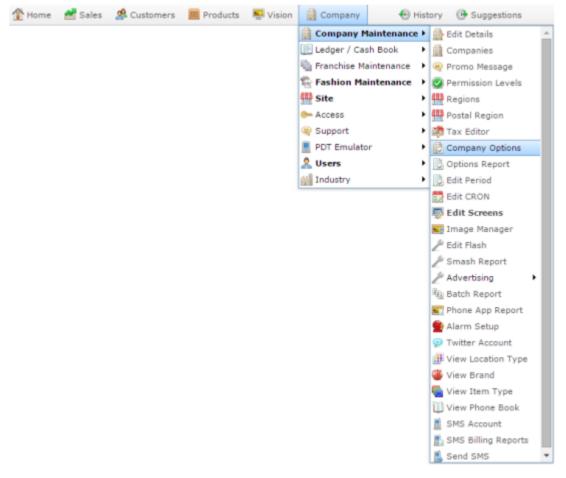
## **Configuring your company for customer relations management**

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

#### **Opening the Company Options - CRM Compulsory section**

To open the Company Options - CRM Compulsory section:

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



The Artist section of the Company Options screen is displayed.

3. Open the Section drop-down list.

Company: Example Company	Options Mainten	ance			
Group:       Portal         Section:       Artist         Name       Value       Description         Artist Label       Artist       Set to to match company requirements         CD Label Label       CD Label       Set to to match company requirements         Catalog Label       Catalog       Set to to match company requirements         Release Date Label       Release Date       Set to to match company requirements         Title Label       Release Date       Set to to match company requirements         Stitle Label       Release Date       Set to to match company requirements         Stitle Label       Release Date       Set to to match company requirements         Title Label       Title       Set to to match company requirements	Company: Exam	nple Company -			
Section:       Artist       Description         Artist Label       Artist       Set to to match company requirements         CD Label Label       CD Label       Set to to match company requirements         Catalog Label       Catalog       Set to to match company requirements         Release Date Label       Release Date       Set to to match company requirements         Title Label       Title       Set to to match company requirements	Configuration				
Name         Value         Description           Artist         Set to to match company requirements           CD Label         Set to to match company requirements           Catalog Label         Catalog           Catalog Label         Catalog           Release Date Label         Release Date           Title Label         Title	Group:	Portal	*		
Name         Value         Description           Artist Label         Artist         Set to to match company requirements           CD Label Label         CD Label         Set to to match company requirements           Catalog Label         Catalog         Set to to match company requirements           Release Date Label         Release Date         Set to to match company requirements           Title Label         Release Date         Set to to match company requirements	Section:	Artist	× .		
CD Label     CD Label     Set to to match company requirements       Catalog Label     Catalog     Set to to match company requirements       Release Date Label     Release Date     Set to to match company requirements       Title Label     Title     Set to to match company requirements	Name			Description	
Catalog     Set to to match company requirements       Release Date Label     Release Date       Title Label     Title   Set to to match company requirements Set to to match company requirements	Artist Label		Artist	Set to to match company requirements	~
Release Date         Set to to match company requirements           Title Label         Title         Set to to match company requirements	CD Label Label		CD Label	Set to to match company requirements	
Title Label Title Set to to match company requirements	Catalog Label		Catalog	Set to to match company requirements	
	Release Date La	sbel	Release Date	Set to to match company requirements	
	Title Label		Title	Set to to match company requirements	
O Undate - Dek					
				Q Update D	alata

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

The CRM Compulsory section is displayed.

Configuration			
Group:	Portal	-	
Section:	CRM Compulsory	*	
Name		Value	Description
Address		False	Set if Compulsory
First Name		False	Set if Compulsory
Gender		False	Set if Compulsory
Home Phone		False	Set if Compulsory
Ignore		False	Set to allow Portal edit to ignore Compulsory flags
Last Name		False	Set if Compulsory
Mobile Phone		False	Set if Compulsory
Postcode		False	Set if Compulsory
Suburb		False	Set if Compulsory
Work Phone		False	Set if Compulsory
email		False	Set if Compulsory

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

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

Field	Description
Occupation	Type <b>True</b> if the customer's occupation must be completed.
Postcode	Type <b>True</b> if the customer's post code must be completed.
Suburb	Type <b>True</b> if the customer's suburb must be completed.
Work Phone	Type <b>True</b> if the customer's work phone number must be completed.

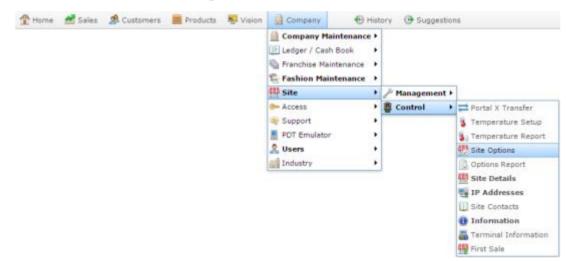
## **Configuring creditor contracts for your site**

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

#### **Opening the Site Options - Creditor Contracts section**

To open the Site Options - Creditor Contracts section:

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



The Cashup section of the Site Options screen is displayed.

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

te: Chadstone	*		
Configuration	Options		
Group:	Portal	*	
Section:	Cashup	×	
Name		Value	Description
Banking Sepera	te	True	Set to Enable capturing Banking on its own
Blind Cashup Ca	ash	True	Set to true for blind cashup Cash Tender
Blind Cashup Te	nder 10	False	Set to true for blind cashup tender # 10
Blind Cashup Te	inder 11	False	Set to true for blind cashup tender # 11
Blind Cashup Te	ander 12	False	Set to true for blind cashup tender # 12
Blind Cashup Te	nder 13	False	Set to true for blind cashup tender # 13
Blind Cashup Te	inder 14	False	Set to true for blind cashup tender # 14
Blind Cashup Te	ander 15	False	Set to true for blind cashup tender # 15
Blind Cashup Te	ander 16	False	Set to true for blind cashup tender # 16
Blind Cashup Te	inder 2	False	Set to true for blind cashup tender # 2
Blind Cashup Te	ander 3	False	Set to true for blind cashup tender # 3
Blind Cashup Te	nder 4	False	Set to true for blind cashup tender # 4
Blind Cashup Te	inder 5	False	Set to true for blind cashup tender # 5
Blind Cashup Te	ander 6	False	Set to true for blind cashup tender # 6
Blind Cashup Te	onder 7	False	Set to true for blind cashup tender # 7

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

The Creditor Contracts section is displayed.

te: Chadstone	-		
Configuration	Options		
Group:	Portal	*	
Section:	Creditor Contracts	*	
Name		Value	Description
Default Expiry		365	Set to number of days for contract default expiry
Enable Contrad	t Override	True	Set to enable user to over ride the contract values
Enable Contrad	ts	True	Set to enable Site to use Creditor Contracts
Force Item In C	Contract - Orders	True	Set to force the item to be present before Ordering
Force Item In C	Contract Receipts	True	Set to force the item to be present in an unsolicited receipt
Force Item In C	Contract Returns	True	Set to force the item to be present for a return
Show Item		True	Set to enable user to view item number in Contract Editor
Show X Ref Iter	m	True	Set to enable user to view Supplier cross

## **Site Options - Creditor Contracts section key fields and buttons**

Name Value Description	<b>Note:</b> The Portal is controlled by the information saved in each configuration's <b>Value</b> field. To change a Portal configuration, type the new setting information into the <b>Value</b> field and press <b>Q Update</b> .								
value Description		Name	Value	Description					
Example Field Name Example Value Description of configuration		Example Field Name	Example Value	Description of configuration	*				

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

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

## **Managing document templates**

You can create templates to control how the documents generated by the Portal appear. You can create templates for:

- Payment slips.
- Invoices.
- Laybys.
- Statements.

#### See:

- *Template Maintenance screen* on page 28.
- *Template Editor screen* on page 31.
- *Templates report* on page 39.

#### What you can do:

- 1. *Creating a new template* on page 17.
- 2. *Editing a template description* on page 21.
- 3. Editing a template layout on page 23.
- 4. *Deleting a template* on page 26.

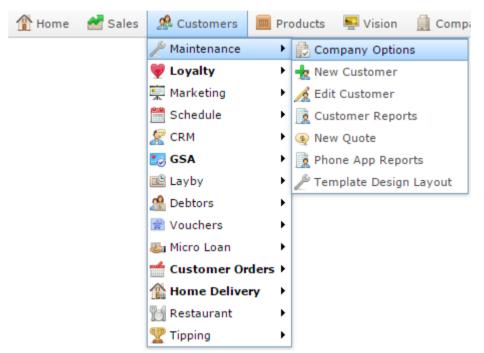
### Creating a new template

Create a new template to control how your documents are displayed and printed. The procedure is the same to create templates for:

- Invoices.
- Layby documents.
- Statements.
- Payment documents.

To create a new template:

- 1. Press <sup>Customers</sup> from the menu bar.
- 2. Press Maintenance > Template Design Layout.



The Templates report is displayed.

Templ	ates F	Report				*	•	
Description	ID	Site	Default Template	Template	Created Date	Change Date	Site FLC	
<u>Statement</u>	1	FLC	✓	Statements	26/06/2015	26/06/2015		
							Add to Favourites	Invoice
							Layby	Payments
							Sta	itements

3. Press the button corresponding to the type of document you want to create.

For example, if you want to create a new template for statements, press

Statements

The Template Maintenance screen is displayed.

Template Maintenance	
Name	
Site:	FLC 👻
Template Type:	Invoice 👻
Description :	
	🔽 Set Default Template
	🖺 New Save & Edit Template 🕥 Reset

- 4. Type a description of the new template to identify it in the **Description** field.
- 5. If you do not want this to be the default template used for this document type, clear the **Set Default Template** field.
- 6. Press Save & Edit Template

The Template Editor is displayed.

Managing	document
	templates

									templates
				HE	ADER				
				Site Name Road Actoria 300 Australia	1				
To:Name Billing address1 Billing address2 Billing address3						a	ccount@	<ul> <li>☑ logo</li> <li>☑ labelNo</li> <li>☑ companyName</li> <li>☑ address</li> <li>☑ email</li> <li>☑ date</li> </ul>	
				Term Due on receipt	Due Date dd-mm-yyyy	,	Amount Due	<ul> <li>✓ to</li> <li>✓ billing1</li> <li>✓ billing2</li> <li>✓ billing3</li> </ul>	
Transaction	ransaction Invoice # Date		Item Description		Amount	Paid	Line Total	☑ midHeader ☑ list	
							- omment		
									-
									-
Current	Current 1-30 Days 31-80 D		ays 61-90 Days		90+ Days	5	Amount Due	-	
\$0.00 Iull		\$0.00	\$0.00	)	\$0.00	\$0.00		\$0.00	
				EC	OTER				

7. Select the information you want to display in the document using the fields in the Control Pane on the right.

See *Template Editor screen* on page 31.

**Note:** You do not need to add any information such as exact email addresses. The Portal automatically completes these when creating documents from this template.

8. Drag and drop the components until the template looks as you want it.

**Tip:** You can press to view a grid to help with positioning. To see how the completed document would look, press to display a preview.

9. When you are happy with the template, press  $\blacksquare$ .

The template is saved.

## **Editing a template description**

Edit a template description if you want to change the name of the template, the site that can use it or whether or not it is the default template for that document type.

**Note:** If you want to edit a template's layout, see *Editing a template layout* on page 23. To edit a template description: 🎎 Customers 1 Press from the menu bar. 2. Press Maintenance > Template Design Layout. 🥵 Customers 🚰 Sales Products 👚 Home 🛀 Vision Comp; Maintenance 🖶 Company Options ۲ 💗 Loyalty ۲ 🚽 New Customer 🚎 Marketing ۲ 🔏 Edit Customer 🛗 Schedule ۲ Customer Reports 🖉 CRM ۲ 🛞 New Quote 🌅 GSA Þ 👰 Phone App Reports 🖳 Layby Þ 🖗 Template Design Layout 🧟 Debtors ۲ 📄 Vouchers ۲ 🌄 Micro Loan ۲ Customer Orders ۲ Home Delivery ۲ 📆 Restaurant ۲ ۲ 🥐 Tipping The Templates report is displayed. . **Templates Report** Site Description ID Site Default Template Created Change Date FLC > Template Date Statement 1 FLC Statements 26/06/2015 26/06/2015 Add to Favourites Invoice Layby Payments Statements

3. Press the **Description** of the template you want to edit.

A popup menu is displayed.

Templates Report										0 0
Description	ID	Site	Default Template	Template	Created Date	Change Date	Site FLC			>
Statement 1 FLC			✓	Statements	26/06/2015	26/06/2015				
Edit	Edit Template Delete Template						Add to Fa	vourites	Inv	voice
Reset Default Template		plate					Layl	у	Pay	ments
								Statem	nents	

#### 4. Press Edit Description Template.

The Template Maintenance screen is displayed.

Template Maintenance	
Name	
Site:	Chadstone 👻
Template Type	:
Description :	
	Set Default Template
	Mew Q Update Edit Template — Delete S Reset

5. Make the required changes.

See Template Maintenance screen on page 28.

6. Press Q Update

The changes are saved.

## Editing a template layout

Edit a template layout if you want to change the appearance of documents generated by the Portal. Documents that have already been created from the template are not affected.

**Note:** If you want to edit a template's name or set it as default, see *Editing a template description* on page 21.

To edit a template layout:

- 1. Press <sup>Customers</sup> from the menu bar.
- 2. Press Maintenance > Template Design Layout.

🏦 Home 🛛 🛃 Sales	🧟 Customers	🥅 Products 🖳 Vision 🚊 Comp
	🎤 Maintenance	Company Options
	💗 Loyalty	🕨 📥 New Customer
	👮 Marketing	🕨 🔏 Edit Customer
	🛗 Schedule	Customer Reports
	🦉 CRM	<ul> <li>New Quote</li> </ul>
	🛃 GSA	Phone App Reports
	🖺 Layby	Template Design Layout
	🦀 Debtors	•
	🗋 Vouchers	•
	🍇 Micro Loan	•
	📹 Customer Or	rders ►
	🏦 Home Delive	ry 🕨
	📆 Restaurant	•
	🏆 Tipping	•

The Templates report is displayed.

Templa	ates Re	eport		*				000		
			1	1	1		Site			
Description	ID	Site	Default Template	Template	Created Date	Change Date	FLC			>
Statement	1	FLC	✓	Statements	26/06/2015	26/06/2015				
							Add to Far	vourites	Inv	voice
							Layt	у	Payr	ments
								Statem	nents	

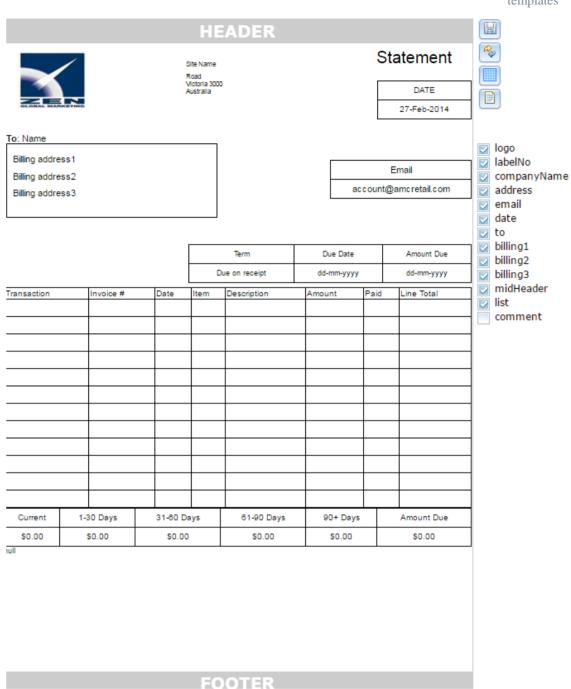
3. Press the **Description** of the template you want to edit.

A popup menu is displayed.

Templates Report							×				
								Site			
Descr	iption	ID	Site	Default Template	Template	Created Date	Change Date	FLC			>
Stater		1 Description T	FLC	~	Statements	26/06/2015	26/06/2015				
	Edit Description Template Edit Template Delete Template							Add to F	avourites	Invoice	
	Rese	t Default Terr	nplate					La	yby	Payment	s
									Statem	nents	

#### 4. Press Edit Template.

The Template Editor is displayed.



5. Make the required changes.

See *Template Editor screen* on page 31.

6. Press

The changes are saved.

## **Deleting a template**

Delete a template if do not want the Portal to use it to create documents. Documents that have already been created with this template are not affected.

To delete a template:

1.	Press <sup>A</sup> Customers	from the menu ba	r.	
2.	Press Maintenance	e > Template Desig	n Lag	yout.
	👚 Home 🛛 🛃 Sale	s 🧟 Customers 🛽	Pro	oducts 📮 Vision 🚊 Compa
		🎤 Maintenance	•	🔁 Company Options
		💗 Loyalty	•	👆 New Customer
		🚎 Marketing	•	🔏 Edit Customer
		🛗 Schedule	•	🙀 Customer Reports
		🧟 CRM	•	👰 New Quote
		🛂 GSA	•	Reports
		🖻 Layby	•	🎤 Template Design Layout
		A Debtors	- •	
		😭 Vouchers	→	
		🍇 Micro Loan	•	
		d Customer Orde	rs⊦	
		🟦 Home Delivery	→	
		📆 Restaurant	→	
		🟆 Tipping	→	

The Templates report is displayed.

Templ	ates F	Report				×		:
							Site	
Description	ID	Site	Default Template	Template	Created Date	Change Date	FLC	2
Statement	1	FLC	~	Statements	26/06/2015	26/06/2015		
							Add to Favourites	Invoice
							Layby	Payments
							Sta	atements

3. Press the **Description** of the template you want to delete.

A popup menu is displayed.

Templ	ates F	Report				×	<b>x</b>	:
Description	ID	Site	Default Template	Template	Created Date	Change Date	Site FLC	>
Edit Dele	1 Description Template te Templat t Default T		~	Statements	26/06/2015	26/06/2015	Add to Favourites	Invoice
Nese	C Delauri I	emprace					Layby	Payments

4. Press Delete Template.

The template is deleted.

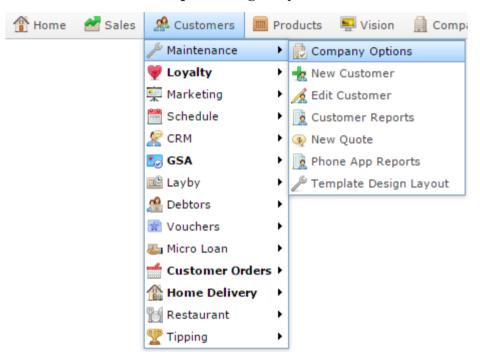
## **Template Maintenance screen**

Use this screen to create or rename a template and allocate it to a site.

#### **Opening the Template Maintenance screen**

To open the Template Maintenance screen:

- 1. Press <sup>A Customers</sup> from the menu bar.
- 2. Press Maintenance > Template Design Layout.



The Templates report is displayed.

Templ	ates	Report				×		:
							Site	
Description	ID	Site	Default Template	Template	Created Date	Change Date	FLC	>
Statement	1	FLC	~	Statements	26/06/2015	26/06/2015		
							Add to Favourites	Invoice
							Layby	Payments
							Statem	ients

3. Press the **Description** of the template you want to view.

A popup menu is displayed.

Templ	ates	Report				×		
Description	ID	Site	Default Template	Template	Created Date	Change Date	Site FLC	
Edit	1 Descripti Templati te Templ		*	Statements	26/06/2015	26/06/2015	Add to Favourites	Invoice
Rese	t Defaul	t Template					Layby	Payments

#### 4. Press Edit Description Template.

The Templates Maintenance screen is displayed.

Template Maintenance	
Name	
Site:	Chadstone
Template Type:	
Description:	
	Set Default Template
	💾 New 🕢 Update Edit Template 🗖 Delete 😰 Reset

## **Template Maintenance screen key fields and buttons**

Field	Description
Site	Select the site the template is used for.
Template Type	Select the type of document the template is for.
Description	Type a description to identify the template.
Set Default Template	Select whether the template should be the default template used at this site for this document type.
New	Create a new template.
<b>Q</b> Update	Save the changes to the current template.
Edit Template Save & Edit Template	Open the Template Editor to edit the contents of the template.
- Delete	Delete this template.
😰 Reset	Cancel any changes since the template was last saved.

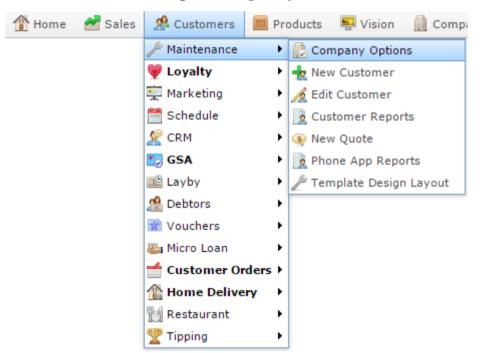
### **Template Editor screen**

Use this screen to design your document template. You can control which items appear on a template, where they appear as well as aspects of how they appear, such as their alignment.

#### **Opening the Template Editor**

To open the Template Editor:

- 1. Press <sup>A</sup> Customers</sup> from the menu bar.
- 2. Press Maintenance > Template Design Layout.



The Templates report is displayed.

Templ	ates	Report				×		1
							Site	
Description	ID	Site	Default Template	Template	Created Date	Change Date	FLC	
Statement	1	FLC	~	Statements	26/06/2015	26/06/2015		
							Add to Favourites	Invoice
							Layby	Payments
							Statem	ients

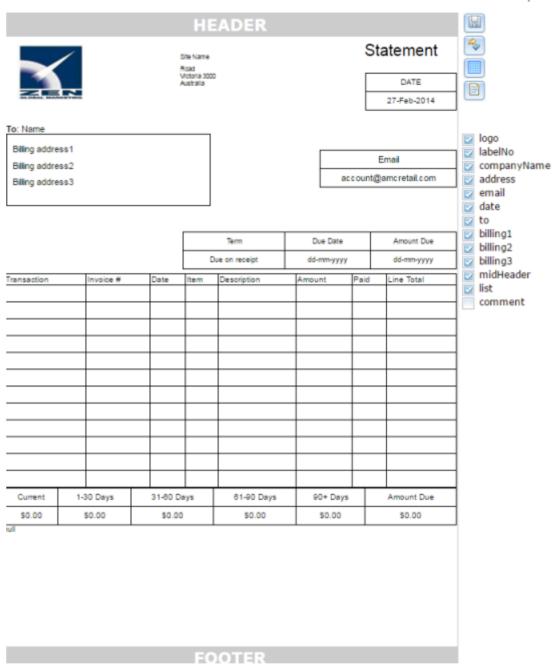
3. Press the **Description** of the template you want to view.

A popup menu is displayed.

Temp	ates R	eport				×				:
Description	ID	Site	Default Template	Template	Created Date	Change Date	Site FLC			>
Edit Dek	1 Description T Template ete Template et Default Ter		*	Statements	26/06/2015	26/06/2015	Add to Fa			voice ments
								Staten	nents	

#### 4. Press Edit Template.

The Template Editor is displayed.



#### **Template Editor key fields and buttons**

#### **Control Pane**

Use this area to save and preview the template and control the elements that are displayed.

**Note:** The fields that are displayed depend on the type of document being created. Not all fields are displayed for all document types.

Field	Description
	Press to save the template.
R	Press to cancel any changes since the template was last saved.
	Press to display a grid on the template to align components.
	<b>Note:</b> This grid is not displayed when documents are created from the template, it is only for checking parts of the template are aligned when designing.
	Press to display a preview of the template.
Logo	Select to include the logo image in the template. You can drag it around the template to position it where you want it.
LabelNo / TaxInvoice	Select to include the document type (for example, Statement, Invoice) in the template. You can drag it around the template to position it where you want it. Statement

Field	Description Select to include your site name in the template. You can drag it around the template to position it where you want it.					
CompanyName						
	Site Name Road Metoria 3000 Australia					
Account	Select to include the customer account number.					
	Account No. 99999					
Address	Select to include your site's address in the template. You can drag it around the template to position it where you want it.					
	Victoria 3000					
Email	Select to include the contact email in the template. You can drag it around the template to position it where you want it.					
	Email account@amcretail.com					
Date	Select to include the document creation date in the template. You can drag it around the template to position it where you want it.					
	DATE 27-Feb-2014					

Field	Description
То	Select to include the box and 'To' field in the template. You can drag it around the template to position it where you want it.
Billing1 / Billing 2 / Billing 3	Select to include the first, second and third lines of the billing address in the template. You can drag it around the template to position it where you want it. Billing address1 Billing address2 Billing address3
ShipTo	Select to include the box and 'To' field in the template. You can drag it around the template to position it where you want it.
Shipping1/ Shipping2 / Shipping3	Select to include the first, second and third lines of the shipping address in the template. You can drag it around the template to position it where you want it.
Title	Select to include a status of the document, such as <b>Delivered</b> .

Field	Description					
MidHeader	Select to include summarised information such as the document terms, due date, amount due or total in the template. You can drag it around the template to position it where you want it. Note: The exact information included depends on the document type.					
	Term	Due (	Date	Amount Due		
	Due on receipt	dd-mm	-уууу	dd-mm-yyyy		
CustomerHeader List	Select to include summarised customer information such as the customer's business or tax number, purchase order number or billing company. Select to include the itemised list in the template. You can drag it around the template to position it where you want it.					
	Transaction Invoice #	Date Iten	n Description	Amount	Paid	Line Total
Comment	Select to include an drag it around the te	+		1		

Managing document templates

#### **Template area**

This area determines where components appear on the template. Drag and drop components to create the template you want. You can add or remove components from the template using the control pane.

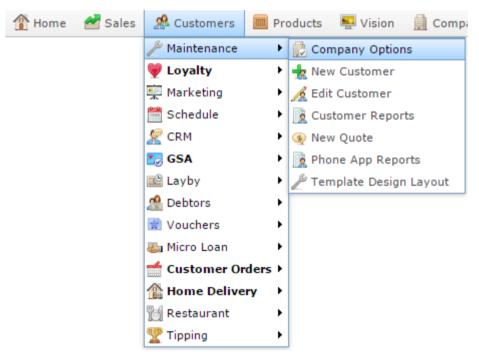
# **Templates report**

Use the Templates report to view, create and edit templates for communication documents such as invoices, statements, payment notices and laybys.

### **Opening the Templates report**

To open the Templates report:

- 1. Press <sup>Customers</sup> from the menu bar.
- 2. Press Maintenance > Template Design Layout.



The Templates report is displayed.

Templ	ates	Report				*		:
							Site	
Description	ID	Site	Default Template	Template	Created Date	Change Date	FLC	3
Statement	1	FLC	~	Statements	26/06/2015	26/06/2015		
							Add to Favourites	Invoice
							Layby	Payments
							State	ments

Managing document templates

# **Templates report key fields**

#### **Filters area**

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Invoice	Press to create a new invoice template.
Layby	Press to create a new layby template.
Payments	Press to create a new payment template.
Statements	Press to create a new statement template.

#### **Report area**

This area displays report information.

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

Field	Description
Description	Description of the template.
ID	Unique code identifying the template
Site	Site the template is used by.
Default Template	Whether this is the default template for this type of communication (for example, the default template for invoices).
Created Date	Date the template was created.
Change Date	Date the template was last edited.

# **Managing customer orders**

Create customer orders to manage customers ordering items from your company.

#### Also see:

- *Customer Orders screen* on page 68.
- *Customer Order report* on page 78.
- *Customer Order Summary report* on page 82.
- *Picking List report* on page 85.
- *Preparation List report* on page 90.

#### What you can do:

- *Creating a new customer order* on page 43.
- *Editing customer orders* on page 52.
- *Adding items to orders* on page 54.
- *Editing items in orders* on page 57
- *Removing items from orders* on page 60.
- *Finalising a customer order* on page 64.
- *Deleting a customer order* on page 66.

# Creating a new customer order

Create a new customer order when a customer wants to purchase specific items from your company that cannot be immediately delivered through the Point of Sale.

Note: You cannot save the	Note: You cannot save the order until items have been added to it.				
To create a new customer o	rder:				
1. Press <sup>2</sup> Customers					
2. Press Customer Ore	lers > Adminis	stration > Edit Order.			
👚 Home 🛛 🛃 Sales	🧟 Customers	🥅 Products 🛛 🖳 Vision 🚊 Company			
	🎤 Maintenance	•			
	💗 Loyalty	•			
	🐺 Marketing	•			
	🛗 Schedule	•			
	🧏 CRM	•			
	🌄 GSA	•			
	🖻 Layby	•			
	🍰 Debtors	•			
	🗋 Vouchers	•			
	🍇 Micro Loan	•			
	d Customer Ord	rders 🕨 🎤 Administration 🕨 素 New Customer			
	🖀 Home Deliver	ry 🔸 📄 Reports 🔹 🥖 Edit Customer			
	📷 Restaurant	Find Order			
	🟆 Tipping	🕨 🦯 Edit Order			

The Find Customer Order screen is displayed.

Find Customer Orders							
Custom A B C D E E G H I J K L M N	Q P Q R S T U V W X Y Z						
Plea	Please choose a field to search on						
Name:							
Customer Number:							
Customer Id:							
Email:							
Mobile:							
Card Number:							
Search							

3. Search for the customer you want to view or edit orders for.

See Finding a customer order on page 47.

The Customer Orders Maintenance screen is displayed.

Customer Ord	ers				
Customer:	Xanatos, Xavier				
Code:	10002199				
Order Number:	New Customer Order	•	Pending Total:	\$0.00	
Site:	Chadstone	•	Order Status:	Open	•
Customer De	tails Items				
Code: 1	10002199				
First Name:	Xavier				
Last Name:	Xanatos				
Phone:	0945698725				
	0416659785				
Fax:					
	XavXan@email.com				
Ciliali.	Aav Aan wennan.con				
Delivery Addre	ess:				
			]		
			]		
Post Code: 3	167				
					📑 Print

- 4. Select New Customer Order in the Order Number drop-down field.
- 5. Select the **Site** for the customer order.

**Note:** You cannot change the site once the order has been created.

- 6. Type the address the order is to be delivered to in the **Delivery Address** field.
- 7. Press the Details tab.

The Details tab is displayed.

Customer Orders	i			
Customer: X	anatos, Xavier			
Code: 1	0002199			
Order Number: N	lew Customer Order 🛛 👻	Pending Total:	\$0.00	
Site: C	hadstone 👻	Order Status:	Open	Ŧ
Customer Detail	Items			
Date:	1/03/2016			
Due:	8/03/2016 💌			
Preferred Hour:	0			
Deposit:				
Delivery Charge:				
Freight:				
Purchase Order:				
Invoice:				
Installer:	None			
Instructions:				
				😹 Print

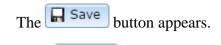
- 8. Select when the order is due for delivery in the **Due** field.
- 9. Press the Items tab.

The Items tab is displayed.

Customer Orde	ers						
Customer:	Xanatos, Xavier						
Code:	10002199						
Order Number:	New Customer Ord	er 🔻		Pending To	tal: \$0.00		
Site:	Chadstone	•		Order Stat	us: Open	v	
Customer Det	ails Items						
Item Code:	P F	ind 🕂 Add	•				
Description:							
Unit Price:							
Description	Item	Price	Packs	Order Qty / kg	Supplied Qty / kg	Order Total	Supplied Total
No Items		\$0.00	0	0	0	\$0.00	\$0.00
						Q	Update Delete
							🚔 Print

10. Add items to the order.

See Adding items to orders on page 54..



11. Press Save

The order is created.

# Finding a customer order

Find a customer order when you want to:

- View or edit the customer order details.
- View or edit the items in the order
- Perform another task that requires specifying the customer order.

To find a customer order, search for the customer the order is for. You can either:

- List all customers starting with a chosen letter.
- Search for a customer by typing information in the search fields.

Once you have selected the customer whose order you want to open, you can choose which order you want to maintain from their Customer Orders Maintenance screen.

### **Opening the Find Customer Order screen**

To open the Find Customer Order screen:

- 1. Press <sup>Customers</sup> in the main menu bar.
- 2. Press Customer Orders > Administration > Find Order.

👚 Home	🛃 Sales	🧟 Customers	🥅 Products 🛛 🖳 Vision 🚊 Company
		🎤 Maintenance	•
		💗 Loyalty	•
		👮 Marketing	•
		🛗 Schedule	•
		🧏 CRM	•
		誤 GSA	•
		🖺 Layby	•
		🦀 Debtors	•
		📄 Vouchers	•
		🍇 Micro Loan	•
		d Customer Ord	ers 🕨 🎤 Administration 🕨 素 New Customer
		🏦 Home Delivery	y 🕨 📄 Reports 🔹 🥖 Edit Customer
		👸 Restaurant	Find Order
		🟆 Tipping	🕨 🦽 Edit Order

The Find Customer Orders screen is displayed.

Custom A B C D E E G H I J K L M N O P Q B S I U Y W X Y Z							
Please choose a field to search on							
Search							

## Listing all customers by letter:

To list customers that start with a specific letter alphabetically:

1. Press the corresponding letter of the alphabet at the top of the search screen.

Find Customer Orders						
Custom A B C D E E G H I J K L M N Q P Q R S I U Y W X Y Z						
Please choose a field to search on						
Name:						
Customer Number:						
Customer Id:						
Email:						
Mobile:						
Card Number:						
Search						

The customers whose surname starts with that letter are listed alphabetically.

Find Customer Orders						
Custom A B C D E E G H I J K	Custom & B C D E E G H I J K L M N O P Q B S I U X W X Y Z					
	Names starting with 'X'					
Xanatos, Xavier (10002199)	Xanatos,Xeno (10002200)					
	Search					

### **Searching for customers**

You can search for a customer based on their:

- Name.
- Customer number.
- Customer ID.
- Email address.
- Mobile phone number.
- Loyalty card number.

The Portal searches for matches:

• Anywhere within the words of the field.

For example, **APP** matches both **apple**, and **pineapple**. If a field contains multiple words, it matches any word in the field.

• From the start of the customer name or customer number.

For example, a search for a customer number of **3** returns all customer numbers starting with 3, not all customer numbers that contain 3.

• Using the first search field that contains data.

For example, if you type **APP** in the **Name** field and **3** in the **Customer Number** field, the Portal ignores the **Customer Number** field and searches for matches to the customer name.

To search for customers:

1. If the custom search fields are not displayed, press the Custom tab.

Find Customer Orders						
	Custom ABC DEEGHIJKLMNOPOBSIUXWXYZ					
Names starting with 'X'						
Xanatos,Xavier (10002199)	Xanatos.Xeno (10002200)					
	Search					

2. Type the term you want to search on in the search fields.

Find Customer Orders						
Custom A B C D E E G H I J K L M N Q P Q B S I U Y W X Y Z						
	Plea	se choose a field to search on				
	Name:					
	Customer Number:					
	Customer Id:					
	Email:					
	Mobile:					
	Card Number:					
		Search				

**Note:** Because the Portal uses the first field with data that it finds, you should only search for customers using one search field at a time.

3. Press Search

The search results are displayed.

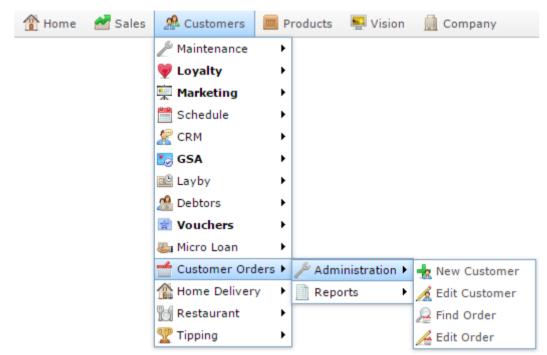
# **Editing customer orders**

Edit a customer order to change the details or items.

Also see Adding items to orders on page 54.

To edit a customer order:

- 1. Press <sup>Second</sup> Customers
- 2. Press Customer Orders > Administration > Edit Order.



The Find Customer Order screen is displayed.

Find Customer Orders								
<u>Custom</u> <u>A</u> <u>B</u> <u>C</u> <u>D</u> <u>E</u> <u>E</u> <u>G</u> <u>H</u> <u>I</u> <u>J</u> <u>K</u> <u>L</u> <u>M</u> <u>N</u>	<u>Custom</u> A B C D E E G H I I K L M N O P Q R S I U V W X Y Z							
Plea	se choose a field to search on							
Name:								
Customer Number:								
Customer Id:								
Email:								
Mobile:								
Card Number:								
	Search							

3. Search for the customer you want to view or edit orders for.

See Finding a customer order on page 47.

The Customer Order Maintenance screen is displayed.

Customer Or	rders				
Customer:	Xanatos, Xavier				
Code:	10002199				
Order Number	r: New Customer Order		Pending Total:	\$0.00	
Site:	Chadstone	·	Order Status:	Open	~
Customer D	Details Items				
Code:	10002199				
First Name:	Xavier				
Last Name:	Xanatos				
Phone:	0945698725				
Mobile:	0416659785				
Fax:					
Email:	XavXan@email.com				
Email:	XavXan@email.com				
Delivery Add	ress:				
			]		
			]		
			]		
Post Code:	3167				
					👼 Print

- 4. Select the order number you want to edit in the **Order Number** drop-down field.
- 5. Make the changes you want in the order.

See Customer Orders screen on page 68

6. Press Save

The changes to the order are saved.

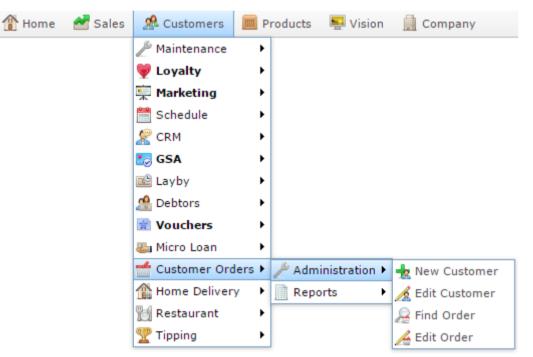
# Adding items to orders

Add an item to a customer order if the customer wants to order units of this item, or you have included the item in the customer order without the customer's request, for example as a free promotional item.

**Note:** Depending on your site configuration, you may add item quantities in individual units, or in packs of items. See *Configuring Customer Orders for your site*.

To add an item to a customer order:

- 1. Press <sup>Second</sup> Customers
- 2. Press Customer Orders > Administration > Edit Order.



The Find Customer Order screen is displayed.

Find Customer Orders							
	Q P Q R S I U V W X Y Z						
Please choose a field to search on							
Name:							
Customer Number:							
Customer Id:							
Email:							
Mobile:							
Card Number:							
	Search						

3. Search for the customer you want to view or edit orders for.

See Finding a customer order on page 47.

The Customer Order Maintenance screen is displayed.

Customer Or	ders				
Customer:	Xanatos, Xavier				
Code:	10002199				
Order Number	r: New Customer Order	•	Pending Total:	\$0.00	
Site:	Chadstone	•	Order Status:	Open	-
Customer D	etails Items				
Code:	10002199				
First Name:	Xavier				
Last Name:	Xanatos				
Phone:	0945698725				
Mobile:	0416659785				
Fax:					
Email:	XavXan@email.com				
Delivery Addr	'ess'				
			1		
			]		
			]		
Post Code:	3167				
					📄 Print
					Com runt

- 4. Select the order number you want to edit in the **Order Number** drop-down field.
- 5. Press the Items tab.

The Items tab is displayed.

Customer Ord	ers						
Customer:	Xanatos, Xavier						
Code:	10002199						
Order Number:	New Customer Ord	er 🔻		Pending Tota	l: \$0.00		
Site:	Chadstone	-		Order Statu	s: Open	v	
Customer De	tails Items						
Item Code:	₽ F	ind 🕂 Add	•				
Description:							
Unit Price:							
Description	Item	Price	Packs	Order Qty / kg S	Supplied Qty / kg	Order Total	Supplied Total
No Items		\$0.00	0	0	0	\$0.00	\$0.00
							Vpdate Delete

6. Type the code of the item you want to add in the **Item Code** field.

See Finding an item with a search field.

7. Press + Add

The item is added to the order.

8. Press Save

The changes to the order are saved.

# **Editing items in orders**

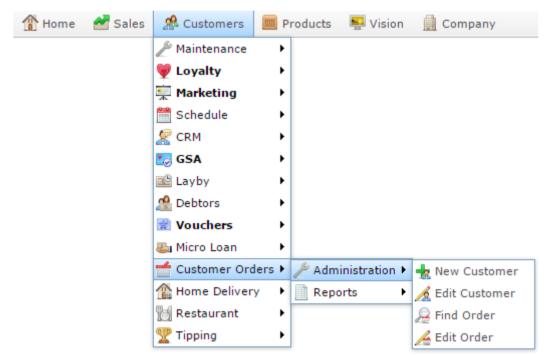
Edit an item to change the quantity ordered or supplied or the price charged per unit for this customer order.

**Tip:** If you can not supply all items in an order, you can configure the Portal to automatically create backorders for unsupplied items. See the **Enable Backorders** field in the Customer Orders section of Site Options. See *Configuring Customer Orders for your site* 

**Note:** Depending on your site configuration, you may list item quantities in individual units, or in packs of items. See *Configuring Customer Orders for your site*.

To edit an item in a customer order:

- 1. Press
- 🍰 Customers
- 2. Press Customer Orders > Administration > Edit Order.



The Find Customer Orders screen is displayed.

Find Customer Orders	
	Q P Q R S I U V W X Y Z
Plea	se choose a field to search on
Name:	
Customer Number:	
Customer Id:	
Email:	
Mobile:	
Card Number:	
	Search

3. Search for the customer you want to view or edit orders for.

See *Finding a customer order* on page 47.

The Customer Orders screen is displayed.

Customer Or	ders				
Customer:	Xanatos, Xavier				
Code:	10002199				
Order Number	: New Customer Order	•	Pending Total:	\$0.00	
Site:	Chadstone	•	Order Status:	Open	T
Customer D	etails Items				
Code:	10002199				
First Name:	Xavier				
Last Name:	Xanatos				
Phone:	0945698725				
Mobile:	0416659785				
Fax:					
Email:	XavXan@email.com				
Delivery Addr	ess:		1		
			]		
			]		
Post Code:	3167				
					🚊 Print

- 4. Select the order number you want to edit in the **Order Number** drop-down field.
- 5. Press the Items tab.

The Items tab is displayed.

Customer Orde	ers						
Customer:	Xanatos, Xavier						
Code:	10002199						
Order Number:	New Customer Orde	er 👻		Pending Tot	al: \$0.00		
Site:	Chadstone	-		Order Stati	us: Open	T	
Customer Det	ails Items						
Item Code:	PF	ind 🕂 Add	•				
Description:							
Unit Price:							
Description	Item	Price	Packs	Order Qty / kg	Supplied Qty / kg	Order Total	Supplied Total
No Items		\$0.00	0	0	0	\$0.00	\$0.00
							×
						Q	Update — Delete
							🚔 Print

6. Select the item in the grid you want to remove.

Customer Orde	ers							
Customer:	Xanatos, Xavier							
Code:	10002199							
Order Number:	134	-		P	ending Total:	\$0.00		
Site:	FLC	•			Order Status:	Open	-	
Customer Det	ails Items							
Item Code:		🔎 Find 🕂 Add	<b>_</b>					
Description:								
Unit Price:	\$	0.00						
Description	Item	Price	Units	Order Qty / kg	Supplied Qty	/ k Back Order	Order Total	Supplied Total
Blue Shirt	321	\$175.00	1	0		0	0 \$0.00	\$0.00
					1			
							Q U	Ipdate 🗕 — Delete
						📄 Print	🖌 Finalise	Delete Order

7. Edit the field you want to change.

See Customer Orders screen on page 68.

8. Press Save

The changes to the order are saved.

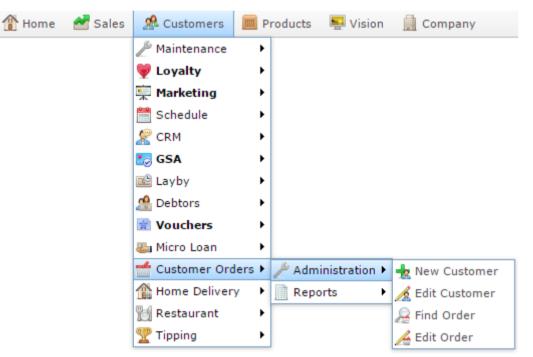
# **Removing items from orders**

Remove an item from a customer order if the customer no longer wants the item, or you are creating a backorder.

**Tip:** If the customer has requested the item, but you are not supplying it with this order, we recommend setting the **Supplied Qty** to **0** to indicate the item was ordered but is currently unavailable.

To remove an item from a customer order:

- 1. Press <sup>Second</sup> Customers
- 2. Press Customer Orders > Administration > Edit Order.



The Find Customer Orders screen is displayed.

Find Customer Orders						
Custom A B C D E F G H I I K L M N Q P Q R S I U V W X Y Z						
Please choose a field to search on						
Name:						
Customer Number:						
Customer Id:						
Email:						
Mobile:						
Card Number:						
	Search					

3. Search for the customer you want to view or edit orders for.

See Finding a customer order on page 47.

The	Customer	Orders	screen	is	disp	layed.

Customer Ord	ers			
Customer:	Xanatos, Xavier			
Code:	10002199			
Order Number:	New Customer Order	Pending Total:	\$0.00	
Site:	Chadstone	Order Status:	Open	~
Customer De	tails Items			
Code: 1	.0002199			
First Name:	Xavier			
Last Name: )	Xanatos			
Phone: (	0945698725			
Mobile: (	0416659785			
Fax:				
	XavXan@email.com			
	avvan geman.com			
Delivery Addre	ss:			
		]		
		]		
Post Code: 3	167			
				😹 Print

- 4. Select the order number you want to edit in the **Order Number** drop-down field.
- 5. Press the Items tab.

The Items tab is displayed.

Customer Orde	ers							
Customer:	Xanatos, Xavier							
Code:	10002199							
Order Number:	New Customer Orde	er 🔻		Pending Tota	al: \$0.00			
Site:	Chadstone	-		Order Statu	s: Open	~		
Customer Det	ails Items							
Item Code:	Item Code:							
Description:								
Unit Price:								
Description	Item	Price	Packs	Order Qty / kg	Supplied Qty / kg	Order Total	Supplied Total	
No Items		\$0.00	0	0	0	\$0.00	\$0.00	
						Q	Vpdate Delete	

6. Select the item in the grid you want to remove.

Customer:	Xanatos, Xavi	er						
Code:	10002199							
Order Number:	134	-		P	ending Total:	\$0.00		
Site:	FLC	-			Order Status:		-	
		•			order Status:	Open	· · ·	
Customer Def	tails Items							
Item Code:			-					
		🔑 Find 🕂 Add						
Description :								
Unit Price:		\$0.00						
Description	Item	Price	Units	Order Qty / kg	Supplied Qty		Order Total	Supplied Total
Blue Shirt	321	\$175.00	1	. 0		0	0 \$0.0	00 \$0.00
							φ <b>ο</b>	\$0.00
								Update — Dele
							G	Update Dele
						Print		

The item is removed.

8. Press Save

7.

The changes to the order are saved.

# Finalising a customer order

Finalise a customer order to complete the order. Changes cannot be made to a finalised order.

**Note:** If the customer has a debtor account, an invoice is automatically created in the debtor system for the finalised order.

To finalise a customer order:

- 1. Press <sup>A</sup> Customers
- 2. Press Customer Orders > Administration > Edit Order.

🏦 Home 🛛 🛃 Sal	es 🧟 Customers 🚺	🔟 Products 🛛 🖳 Vision	🛄 Company
	🎤 Maintenance	•	
	💗 Loyalty	•	
	👮 Marketing	•	
	🛗 Schedule	•	
	🧏 CRM	•	
	🔝 GSA	•	
	🖺 Layby	•	
	🧟 Debtors	•	
	🗋 Vouchers	•	
	🎩 Micro Loan	•	
	d Customer Order	rs 🕨 🎤 Administration 🕨	📩 New Customer
	🏦 Home Delivery	Reports	🔏 Edit Customer
	👩 Restaurant	•	ᇩ Find Order
	🟆 Tipping	•	🔏 Edit Order

The Find Customer Order screen is displayed.

Find Customer Orders						
Custom A B C D E F G H I J K L M N Q P Q B S I U Y W X Y Z						
Please choose a field to search on						
Name:						
Customer Number:						
Customer Id:						
Email:						
Mobile:						
Card Number:						
	Search					

3. Search for the customer you want to view or edit orders for.

See Finding a customer order on page 47.

Customer Orde	ers				
Customer:	Xanatos, Xavier				
Code:	10002199				
Order Number:	134 💌	Pending Total:	\$0.00		
Site:	FLC 💌	Order Status:	Open	T	
Customer Det	tails Items				
Code: 1	0002199				
First Name: >	avier				
Last Name: >	(anatos				
Phone: 0	945698725				
Mobile: 0	416659785				
Fax:					
Email:	(avXan@email.com				
Delivery Addres	ss:				
Post Code: 31	167				
			📄 Print	✓ Finalise	Delete

The Create Orda in diaml 

- 4. Select the order number you want to edit in the **Order Number** drop-down field.
- 5. Press Finalise

The order is finalised.

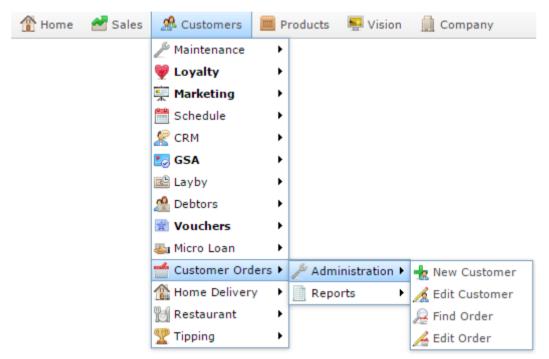
der

## **Deleting a customer order**

Delete a customer order to cancel the order.

To delete a customer order:

- 1. Press <sup>Customers</sup>
- 2. Press Customer Orders > Administration > Edit Order.



The Find Customer Orders screen is displayed.

Find Customer Orders					
Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z					
Please choose a field to search on					
Name:					
Customer Number:					
Customer Id:					
Email:					
Mobile:					
Card Number:					
	Search				

3. Search for the customer you want to view or edit orders for.

See Finding a customer order on page 47.

The Customer Orders screen is displayed.

Customer Or	ders					
Customer:	Xanatos, Xavier					
Code:	10002199					
Order Number	r: 134	•	Pending Total:	\$0.00		
Site:	FLC	•	Order Status:	Open	-	
Customer D	etails Items					
Code:	10002199					
First Name:	Xavier					
Last Name:	Xanatos					
Phone:	0945698725					
Mobile:	0416659785					
Fax:						
Email:	XavXan@email.com					
Delivery Addı						
Delivery Addi	1855.		1			
			]			
			]			
Post Code:	3167					
				📄 Print	🖌 Finalise	Delete Order

- 4. Select the order number you want to edit in the **Order Number** drop-down field.
- 5. Press Delete Order

The order is deleted.

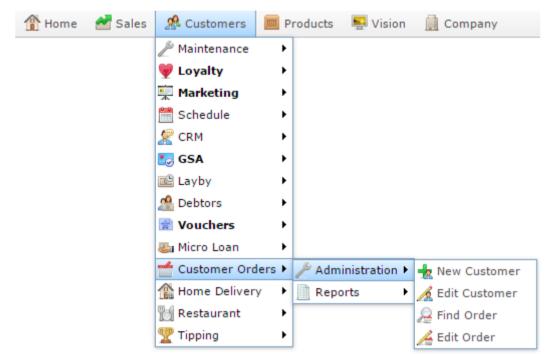
# **Customer Orders screen**

Use this screen to view or maintain customer orders.

### **Opening the Customer Orders screen**

To open the Customer Orders screen:

- 1. Press <sup>A Customers</sup>
- 2. Press Customer Orders > Administration > Edit Order.



The Find Customer Orders screen is displayed.

Find Customer Orders					
<u>Custom</u> A <u>B</u> <u>C</u> <u>D</u> <u>E</u> <u>F</u> <u>G</u> <u>H</u> <u>I</u> <u>I</u> <u>K</u> <u>L</u> <u>M</u> <u>N</u> <u>O</u> <u>P</u> <u>Q</u> <u>R</u> <u>S</u> <u>T</u> <u>U</u> <u>V</u> <u>W</u> <u>X</u> <u>Y</u> <u>Z</u>					
Please choose a field to search on					
Name:					
Customer Number:					
Customer Id:					
Email:					
Mobile:					
Card Number:					
	Search				

3. Search for the customer you want to view or edit orders for.

See Finding a customer order on page 47.

The Customer Orders screen is displayed.

Customer Or	ders					
Customer:	Xanatos, Xavier					
Code:	10002199					
Order Number	: 134	•	Pending Total:	\$0.00		
Site:	FLC	•	Order Status:	Open	-	
Customer D	etails Items					
Code:	10002199					
First Name:	Xavier					
Last Name:	Xanatos					
Phone:	0945698725					
Mobile:	0416659785					
Fax:						
Email:	XavXan@email.com					
Dellara Add						
Delivery Add	ess:		1			
			]			
			]			
Post Code:	3167					
				Print	Y Finalise	Delete Order

## **Customer Orders screen key fields and buttons**

Field	Description	
Customer	Customer's name.	
Code	The customer's unique code.	
Order Number	Select the order to view, or <b>New Customer Order</b> to create a new order.	
Site	Select the site to create the customer order for.	
Pending Total	The total of the customer order.	
Order Status	The status of the customer order.	
Je Print	Press to print the customer order.	
Y Finalise	Press to finalise the customer order.	
Delete Order	Press to delete the customer order.	

### **Common fields and buttons**

### **Customer tab**

Use this tab to view the customer's contact details and address.

Customer Orders				
Customer:	Xanatos, Xavier			
Code:	10002199			
Order Number	: New Customer Order	Pending Total:	\$0.00	
Site:	Chadstone	Order Status:	Open -	
Customer Details Items				
Code: 10002199				
First Name:	Xavier			
Last Name:	Xanatos			
Phone:	0945698725			
Mobile:	0416659785			
Fax:				
Email:	XavXan@email.com			
Ciliali.	Aavan@email.com			
Delivery Address:				
Post Code: 3167				
			Print	

Field	Description
Code	Unique code that identifies the customer.
First Name	The customer's first name.
Last Name	The customer's last name.
Phone	The customer's phone number.
Mobile	The customer's mobile number.
Fax	The customer's fax number.

Field	Description
Email	The customer's email address.
Delivery Address	The customer's delivery address.
Post Code	The customer's post code.

#### **Details tab**

Use this area to view the order details, such as deposits and delivery charges.

Customer Orders	
Customer: Xanatos, Xavier	
Code: 10002199	
Order Number: New Customer Order v Pending Total: \$0.00	
Site: Chadstone 💌 Order Status: Open 💌	
Customer Details Items	
Date: 1/03/2016	
Due: 8/03/2016 -	
Preferred Hour: 0	
Deposit:	
Delivery Charge:	
Freight:	
Purchase Order:	
Invoice:	
Installer: v	
Instructions:	
	📄 Print

Field	Description
Date	Date the order was created.
Due	Date the order is due to be delivered.
Preferred Hour	Preferred time of day for the order delivery.
Deposit	Deposit the customer paid for the order.
Delivery Charge	Delivery charges added to the order.

Field	Description
Freight	Freight charge for the order.
Purchase Order	Purchase order number for the related purchase order.
Invoice	Invoice number for the related invoice.
Installer	Select the person to install the product if required.
Instructions	Any delivery instructions from the customer.

#### Items tab

Customer Orde	ers						
Customer:	Xanatos, Xavier						
Code:	10002199						
Order Number:	New Customer Ord	er 👻		Pending To	tal: \$0.00		
Site:	Chadstone	-		Order Stat	us: Open	-	
Quatara an Dat	- 11.						
Customer Det	ails Items						
Item Code:			-				
	() F	ind 🕂 Add					
	2						
Description:							
Unit Price:	74	Price	Packs	Orden Obs (Jun	Council of Obs. ( )	Onder Tabel	Council of Tabal
Description No Items	Item	\$0.00	Packs 0	Order Qty / kg 0	Supplied Qty / kg 0		Supplied Total \$0.00
No Items		\$0.00	Ŭ	0	Ū	\$0.00	\$0.00
							Visiteta Datata
						<u>_</u>	Update — Delete
							Drint
							🚔 Print

Use this area to view and maintain items in the customer order.

Field	Description
Item Code	Search for an item to add to the order. See <i>Finding an item with a search field</i> .
Description	Description of the item.
Item	Unique code identifying the item.
Price	Price of the item.

Field	Description
Packs	Number of packs ordered. The Portal automatically calculates the correct weight or quantity required.
	<b>Note:</b> This field is only displayed if <b>Enable Units</b> is set to <b>False</b> in the Customer Orders section of Site Options. See <i>Configuring Customer Orders for your site</i>
Units	Number of units ordered. The Portal automatically calculates the correct weight or number of packs.
	<b>Note:</b> This field is only displayed if <b>Enable Units</b> is set to <b>True</b> in the Customer Orders section of Site Options. See <i>Configuring Customer Orders for your site</i>
Order Qty / kg	Number of units or kg the customer ordered.
Supplied Qty / kg	Number of units or kg you supplied.
Backorder	Number of units or kg that cannot be supplied at this time because you do not have them in stock.
	<b>Note:</b> If backorders are enabled for the site, when the customer order is finalised, an additional backorder customer order is created with any quantities on back order. See the <b>Enable Backorder</b> field in the Customer Orders section of Site Options. See <i>Configuring Customer Orders for your site</i> .
Order Total	Total price of all units of the item ordered.
Supplied Total	Total price of all units of the item supplied.
Q Update	Press to save any changes to the item list.

Field	Description
- Delete	Press to remove the selected item from the item list.

### **Customer Order report**

Use the Customer Order report to view customer orders details.

### **Opening the Customer Order report**

To open the Customer Order report:

- 1. Press Customers from the menu bar.
- 2. Press Customer Orders > Reports > Orders (Due).

🏠 Home  🛃 Sales	A Customers	🔲 Products 🛛 😽 Vi	sion 🛄 Company	🕀 Histor
	Maintenance Uoyalty Marketing Schedule CRM GSA Layby Debtors Vouchers Micro Loan	<ul> <li>&gt;</li> <li>&gt;&lt;</li></ul>		
	Customer Order	rs • Administrati • Reports •	on • Customers Summary Orders (Due) Prep List Picking List Home Shopping	Department

Customer Order Report - Pending Customer 🖉

	IDCI	Num		
otal:				otal:
- 10 m.				oue.

Site		
FLC		
Ву		
Day		
Date		
3/03/2016	5	
Туре		
Pending		

### **Customer Order report key fields**

#### **Filters area**

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week or month.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Туре	<ul> <li>Select to filter the report to customer's orders that are:</li> <li>Pending.</li> <li>Finalised.</li> <li>Delivered.</li> <li>All customer orders.</li> </ul>

#### **Report area**

This area displays report information.

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

Field	Description
Site /	The name of the relevant site.
Description	
Name /	Name of the debtor or customer.
Customer /	
Customer Name /	
Debtor	
Debtor Code/	Unique code identifying the
Customer Code /	debtor.
Number /	
Account	
Customer / Details	Customer name and details.
Order # /	Code identifying the order.
Order Number /	
Order	
Price	Price of the item in the order.

Field	Description	
Units	Number of units of this item included in the order.	
Qty / Kg	Quantity of item included in the order. The Portal automatically expands out any packs or unit- weights to be the number of units or correct weight ordered.	
Total	Total price of this item in the order.	
Due Date	Date the order is due.	
Deposit	Deposit paid for the order.	
Amount Due	Amount still owed by the customer.	

### **Customer Order Summary report**

Use the Customer Order Summary report to view customer orders by time period.

#### **Opening the Customer Order Summary report**

To open the Customer Order Summary report:

- 1. Press Customers from the menu bar.
- 2. Press **Customer Orders > Reports > Summary**.

Thome Sales	A Customers	Products 🛛 🛒 Vision	Company	\rm Histor
	Maintenance			
	Customer Orders	8 L	1	
	Home Delivery	Reports •	Customers  Summary  Orders (Due)  Prep List  Picking List  Home Shopping D	Department

The Customer Order Summary report is displayed.

Customer	Month End 30-Sep- 2015	Month End 31-Oct- 2015	Month End 30-Nov- 2015	Month End 31-Dec- 2015	Month End 31-Jan- 2016	Month End 29-Feb- 2016	Month End 31-Mar- 2016	Total
Bird, Bob	\$0.00							\$0.00
Fotal:	\$0.00							\$0.00

		:
Site		
Chadstone	•	>
Ву		
Month		>
Date		
1/03/2016		
Туре		
Pending		>

### **Customer Order Summary report key fields**

#### **Filters area**

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Ву	Select to display the report for a specific day, week, month or a period specified between two dates. <b>Note:</b> Additional fields are displayed to select the specific date period if Between Dates or Date Range is selected.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Туре	<ul> <li>Select to filter the report to customer's orders that are:</li> <li>Pending.</li> <li>Finalised.</li> <li>Delivered.</li> <li>All customer orders.</li> </ul>

#### **Report area**

This area displays report information.

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

Field	Description
Name /	Name of the debtor or customer.
Customer /	
Customer Name /	
Debtor	
Day	Total dollar amount of customer
Week End	orders for the selected day, week or month.

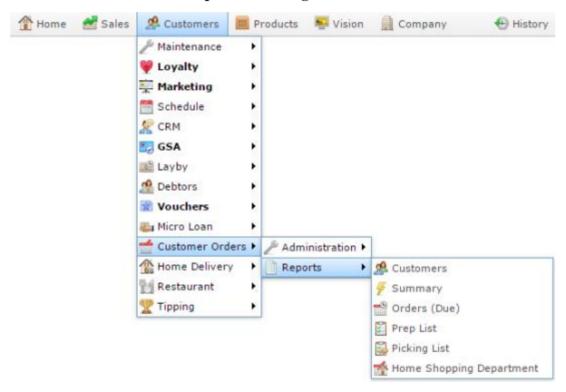
### **Picking List report**

Use the Picking List report to view the list of items that need to be placed into customer orders.

#### **Opening the Picking List report**

To open the Picking List report:

- 1. Press <sup>Customers</sup> from the menu bar.
- 2. Press Customer Orders > Reports > Picking List.



The Picking List report is displayed.

# Customer Order Picking Report - From 30 Mai

item	Description	Order	Qty/Kg	Packs	Price	Total
1	Chicken Breast	36	0.0	1	\$7.99	\$0.00
Total			0.0			\$0.00
<u>189</u>	Argies Of Beef	11	50.0	1	\$7.50	\$375.00
Total			50.0			\$375.00
2	Chicken Brocolii & Cheese Pocket	31	40.0	1	\$2.50	\$100.00
Total			40.0			\$100.00
31	Bbq Plum Chicken Nibbles	13	200.0	1	\$998.00	\$199,600.00

Site	
Date From	
30/03/2003	
Date To	
30/03/2016	
Туре	
Pending	>
style	
Detailed	>

### **Picking List report key fields**

#### **Filters area**

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site /	Select the site or sites to report on.
Sites	
Date /	Select the date or date period to report on.
Date From and Date To /	
As of /	
Start Date and End Date	
Туре	Select to filter the report to customer's orders that are:
	<ul> <li>Pending.</li> </ul>
	<ul> <li>Finalised.</li> </ul>
	<ul> <li>Delivered.</li> </ul>
	<ul> <li>All customer orders.</li> </ul>
Style	Select to display the report in a detailed or summary view.

#### **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
Item /	Description of the item.
Description	<b>Note:</b> Click on the description to access other options in a popup menu.
Pack	Number of units in a single pack.
Item Number / Item	The item code of the item.
Order # / Order Number / Order	Code identifying the order.
Price	Price of the item in the order.
Qty / Kg	Quantity of item included in the order. The Portal automatically expands out any packs or unit- weights to be the number of units or correct weight ordered.

\_\_\_\_\_

	Field	Description
Total		Total price of this item in the order.

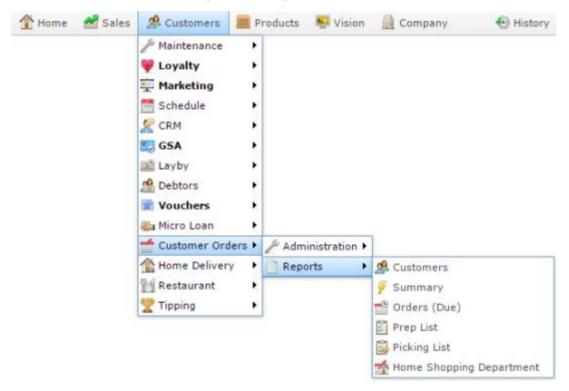
# **Preparation List report**

Use the Preparation List report to view the list of orders that need to be prepared for customers.

#### **Opening the Preparation List report**

To open the Preparation List report:

- 1. Press <sup>Customers</sup> from the menu bar.
- 2. Press Customer Orders > Reports > Prep List.



The Preparation List report is displayed.

Add to Favourites

÷

>

>

>

Site	Amount Due	Deposit	Due Date	Total	Qty / Kg	Units	Price	Order #	Mobile	Custome / Details
FLC								Al		Print All
Date										
1/03/20										
ву										
Day										
Туре										

## **Preparation List report key fields**

#### **Filters area**

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week or month.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.
Туре	<ul> <li>Select to filter the report to customer's orders that are:</li> <li>Pending.</li> <li>Finalised.</li> <li>Delivered.</li> <li>All customer orders.</li> </ul>

#### **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
Customer / Details	Customer name and details.
Mobile	Customer's mobile number.
Order # / Order Number / Order	Code identifying the order.
Price	Price of the item in the order.
Units	Number of units of this item included in the order.
Qty / Kg	Quantity of item included in the order. The Portal automatically expands out any packs or unit- weights to be the number of units or correct weight ordered.
Total	Total price of this item in the order.

Field	Description
Due Date	Date the order is due.
Deposit	Deposit paid for the order.
Amount Due	Amount still owed by the customer.

# Managing customer contact

You can manage customer contact records to keep regular contact with your customers.

#### Also see:

- *Customer Maintenance screen* on page 104.
- *Customer Contact report* on page 116.
- *Customer Name and Address Extract report* on page 120.

#### What you can do:

- *Creating a new customer management record* on page 96.
- *Editing a customer management record* on page 114.

Managing customer contact

### Creating a new customer management record

Create a new customer management record to manage customer contact and information.

**Note:** Customer management records are automatically created when customers are created in other customer based Portal systems such as debtors, loyalty, customer orders, etc.

To create a new customer management record:

- 1. Press <sup>Sh</sup> Customers
- 2. Press **CRM > Maintenance > New Customer**.

🏦 Home	🚰 Sales	🧟 Customers 📗	I P	roducts 🛛 🖳 Vision	n 🚊 Company
		🎤 Maintenance	►		
		💗 Loyalty	۲		
		🚎 Marketing	►		
		🛗 Schedule	►		
		🧏 CRM	≁	🎤 Maintenance 🕨	🛃 Company Options
		🌄 GSA	×		📩 New Customer
		🕮 Layby	×		🔏 Edit Customer
		🦀 Debtors	×		🙀 Customer Reports
		🛒 Vouchers	×		😥 Contact Reports
		🍇 Micro Loan	×		
		📹 Customer Orders	s 🕨		
		🏠 Home Delivery	►		
		📷 Restaurant	►		
		🏆 Tipping	•		

The Customer Maintenance screen is displayed.

#### Managing customer contact

Customer Maintenance - Amc master	
Customer Name: Xavier	
Customer Number: 10002199	
Card Number: 2731444304495	
* indicates compulsory field	
Name Address Control Contact Transactions Surveys	
Title: Dr 👻	
First Name: Xavier	
Surname: Xanatos	
Contact Name: Xavier	
Home Phone: 0945698725	
Work Phone:	
Mobile: 0416659785	
Fax:	
Email Address: XavXan@email.com	
Date of Birth: 1/01/1900 ~	
Comments:	
	S Cancel P New Add / Update

# 3. Press 🖺 New

The Customer Maintenance screen is displayed.

Customer Main	tenance -	Amc mas	ster	
Customer Name:				
Customer Numbe	r:			
	* indica	ates compu	alsory field	ł
Name Address	Control	Contact	Surveys	
Title:	Please Sel	lect	-	
First Name:				
Sumame:				
Contact Name:		_		
Home Phone:				
Work Phone:		_		
Mobile:				
Fax:				
Email Address:				
Date of Birth:	1/01/190	0	*	
Comments:				

- 4. Select the customer's preferred salutation in the **Title** drop-down field.
- 5. Type the customers name in the **First Name** and **Surname** fields.
- 6. Press Add / Update .

Managing customer contact

The new customer management record is created.

### **Finding a customer**

Find a customer when you want to:

- View or edit the customer's details.
- Contact the customer.
- Fill a customer order for that customer.
- Perform another task that requires specifying the customer.

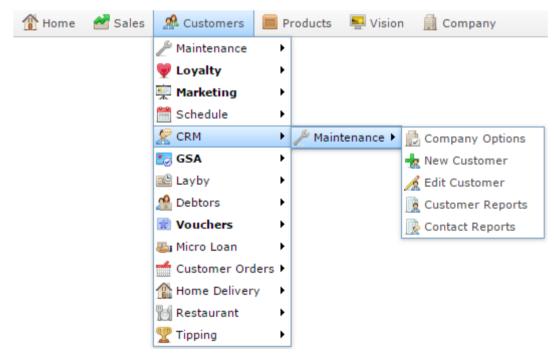
You can either:

- List all customers starting with a chosen letter.
- Search for a customer by typing information in the search fields.

#### **Opening the Find Customer screen**

To open the Find Customer screen:

- 1. Press <sup>Customers</sup> in the main menu bar.
- 2. Press **CRM > Maintenance > Edit Customer**.



The Find Customer screen is displayed.

Managing customer contact

Find Customer		
Custom A B C D E E G H I J K L M N	Q P Q B S T U V W X Y Z	
Plea	se choose a field to search on	
Name:		
Customer Number:		
Customer Id:		
Email:		
Mobile:		
Card Number:		
Search		

### Listing all customers by letter:

To list customers that start with a specific letter alphabetically:

1. Press the corresponding letter of the alphabet at the top of the search screen.

Find Customer	Find Customer		
Custom A B C D E E G H I J K L M N O P Q B S I U X W X Y Z			
Please choose a field to search on			
Name:			
Customer Number:			
Customer Id:			
Email:			
Mobile:			
Card Number:			
Search			

The customers that start with that letter are listed alphabetically.

Find Customer	
Custom A B C D E E G H I J	KLMNQPQBSIUXWXXZ
	Names starting with 'X'
Xanatos,Xavier (10002199)	Xanatos.Xeno (10002200)
	Search

Managing customer contact

#### **Searching for customers**

You can search for a customer based on their:

- Name.
- Customer number.
- Customer ID.
- Email address.
- Mobile phone number.
- Loyalty card number.

The Portal searches for matches:

• Anywhere within the words of the field.

For example, **APP** matches both **apple**, and **pineapple**. If a field contains multiple words, it matches any word in the field.

• From the start of the customer name or customer number.

For example, a search for a customer number of **3** returns all customer numbers starting with 3, not all customer numbers that contain 3.

• Using the first search field that contains data.

For example, if you type **APP** in the **Name** field and **3** in the **Customer Number** field, the Portal ignores the **Customer Number** field and searches for matches to the customer name.

To search for customers:

1. If the custom search fields are not displayed, press the Custom tab.



2. Type the term you want to search on in the search fields.

#### Managing customer contact

Find Customer			
Please choose a field to search on			
	Name:		
Cu	istomer Number:		
	Customer Id:		
	Email:		
	Mobile:		
	Card Number:		
Search			

**Note:** Because the Portal uses the first field with data that it finds, you should only search for customers using one search field at a time.

3. Press Search

The search results are displayed.

Managing customer contact

1 Press

### **Customer Maintenance screen**

Use this screen to keep in contact with your customers, noting:

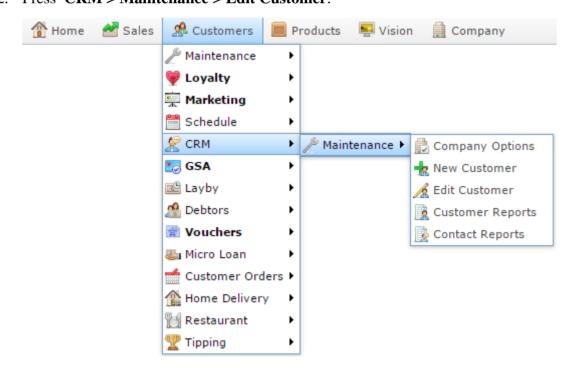
- Their contact details.
- A schedule for regular contact.
- When and how they prefer to be contacted.
- Records of previous times the customer was contacted.
- The customer's transactions with your company.
- Marketing surveys the customer has completed.

#### **Opening the Customer Maintenance screen**

To open the Customer Maintenance screen:

🥵 Customers

2. Press **CRM > Maintenance > Edit Customer**.



The Find Customer screen is displayed.

#### Managing customer contact

Find Customer			
Custom A B C D E F G H I J K L M N	Q P Q R S I U V W X Y Z		
Plea	se choose a field to search on		
Name:			
Customer Number:			
Customer Id:			
Email:			
Mobile:			
Card Number:			
Search			

3. Search for the customer you want to view or edit.

See Finding a customer on page 99.

The Customer Maintenance screen is displayed.

Customer Main	itenance - Amc master
Customer Name:	Xavier
Customer Numbe	er: 10002199
Card Number:	2731444304495
	* indicates compulsory field
Name Address	Control Contact Transactions Surveys
Title:	Dr
First Name:	Xavier
Surname:	Xanatos
Contact Name:	Xavier
Home Phone:	0945698725
Work Phone:	
Mobile:	0416659785
Fax:	
Email Address:	XavXan@email.com
Date of Birth:	1/01/1900 -
Comments:	
	S Cancel Mew Add / Update

### **Customer Maintenance screen key fields and buttons**

#### **Common fields and buttons**

Field	Description
Customer Name	The customer's first name.
Customer Number	The unique number identifying the customer within the Portal.
Card Number	The customer's loyalty card number, if they have a linked loyalty account.
Debtor Number	The customer's debtor number, if they have a linked debtor account.
S Cancel	Press to undo any changes made since the last save.
new 🕅	Press to create a new customer.
Add / Update	Press to save any changes to an existing customer.

#### Name tab

Use this area to define the customer's contact details.

Customer Maintenance - Amc master			
Customer Name: Xavier			
Customer Number: 10002199			
Card Number: 2731444304495			
* indicates compulsory field			
Name Address Control Contact Transactions Surveys			
Title: Dr			
: Xavier			
Surname: Xanatos			
tact Name: Xavier			
Home Phone: 0945698725			
Work Phone:			
Mobile: 0416659785			
Fax:			
Email Address: XavXan@email.com			
Date of Birth: 1/01/1900			
Comments:			
S Cancel 🖺 New Add / Update			

Field	Description
Title	Customer's preferred salutation.
First Name	Customer's first name.
Surname	Customer's last name.
Contact Name	Name of the person to contact about this customer.
Home Phone	Customer's home phone number.

Field	Description
Work Phone	Customer's work phone number.
Mobile	Customer's mobile number.
Fax	Customer's fax number.
Email Address	Customer's email address.
Date of Birth	Customer's date of birth.
Comments	Any comment regarding the customer.

### Address tab

Use this area to define the customer's address.

Custo	ner Maint	enance -	Amc ma	ster	
Custom	er Name:				
Custom	er Numbei				
		* indica	ites compu	lsory field	
Name	Address	Control	Contact	Surveys	
					Address:
					Suburb:
					State:
					Post Code:
					S Cancel 🕅 New Add / Update

Field	Description
Address	The customer's address.
Suburb	The customer's suburb.
State	The customer's state.
Post Code	The customer's post code.

#### **Control tab**

Use this area to define the contact schedule for the customer and the customer's preferred method of contact.

Customer Maintenance - Amc master	
Customer Name:	
Customer Number:	
* indicates compulsory field	
Name Address Control Contact Surveys	
Last Contact :	1/01/1970
Next Contact :	1/03/2016
Call Frequency:	Don't Contact 🗸
Best Time to Call:	Morning
	─ Sunday
	Monday
	Tuesday
Day to Call	⊙ Wednesday
	O Thursday
	💿 Friday
	⊙ Saturday
Customer Would Like:	To Call them
Mail:	Opt In
Email:	Opt In
SMS:	Opt In 🗸
	Cancel Mew Add / Update

Field	Description
Last Contact	Date the customer was last contacted.
Next Contact	Date the customer is next scheduled to be contacted.
Call Frequency	How often the customer should be contacted.
Best Time to Call	Select the best time of day to call.

Field	Description			
Day to Call	Select the best day of the week to call the customer.			
Customer Would Like	Select the mode of communication the customer prefers.			
Mail	Select whether the customer has opted into receiving mail.			
Email	Select whether the customer has opted into receiving email.			
SMS	Select whether the customer has opted into receiving SMS messages.			

### **Contact tab**

Use this area to view when a customer has been contacted.

ustomer Maint	enance - A	Amc mas	ster			
stomer Name:						
stomer Number	:					
	* indicat	es compu	Ilsory field			
ame Address	Control	Contact	Surveys			
Date		(	Contact Type	User	Comments	
					🚫 Cancel  💾 New 🛛 Add	/ Update

Field	Description		
Date	Date the customer was contacted.		
Contact Type	Type of contact that occurred.		
User	The name of the Portal who contacted the customer.		
Comments	Any comments on the customer contact.		

# Surveys tab

Use this area to view surveys completed by a customer.

Customer Maintenance - Amc m	aster		
Customer Name:			
Customer Number:			
* indicates com	pulsory field		
Name Address Control Contac	t Surveys		
Description	Survey #	Date	Questions
Bob Test Survey	2	08 SEP 2009	8
Clives Survey	25	11 MAY 2014	1
First Survey	1	02 JUN 2008	3
Gregs Test	3	02 JUN 2008	3
Poste Code	6	10 OCT 2008	1
Survey	5	28 AUG 2008	1
Thirsty Camel Form	4	28 MAY 2008	6
			Cancel 🏾 🎢 New 🛛 Add / Updat

Field	Description
Description	Description of the survey.
Survey #	Unique number identifying the survey.
Date	Date the survey was taken.
Questions	Number of questions in the survey.

# Editing a customer management record

Edit a customer management record to change a customer's contact information or schedule.

To edit a customer management record:

1. Press <sup>A</sup>Customers 2. Press **CRM > Maintenance > Edit Customer**. 🛃 Sales The Home 🥵 Customers Products Vision Company 🖗 Maintenance ۲ 💗 Loyalty ۲ 🚎 Marketing ۲ 🛗 Schedule ۲ 🐙 CRM ۲ 🖗 Maintenance 🕨 🛃 Company Options 🌅 GSA ۶ 👆 New Customer 🖳 Layby ۲ 🔏 Edit Customer 🥵 Debtors ۲ Customer Reports 0 🗋 Vouchers ۲ Contact Reports 🛃 Micro Loan ۲ Customer Orders 🕨 🏠 Home Delivery ۲ Restaurant 16 ۲ Tipping ۲

The Find Customer screen is displayed.

Find Customer	
Custom A B C D E F G H I J K L M N	$\underline{Q}  \underline{P}  \underline{Q}  \underline{R}  \underline{S}  \underline{T}  \underline{U}  \underline{V}  \underline{W}  \underline{X}  \underline{Y}  \underline{Z}$
Plea	se choose a field to search on
Name:	
Customer Number:	
Customer Id:	
Email:	
Mobile:	
Card Number:	
	Search

3. Search for the customer you want to view or edit.

See Finding a customer on page 99.

The Customer Maintenance screen is displayed.

Customer Maintenance - Amc master								
Customer Name: Xavier								
Customer Number: 10002199								
Card Number: 2731444304495								
* indicates compulsory field								
Name Address Control Contact Transactions Surveys								
Title:								
First Name: Xavier								
Surname: Xanatos								
Contact Name: Xavier								
Home Phone: 0945698725								
Work Phone:								
Mobile: 0416659785								
Fax:								
Email Address: XavXan@email.com								
Date of Birth: 1/01/1900 v								
Comments:								
S Cancel Mew Add / Update								

4. Make the required changes

See Customer Maintenance screen on page 130.

5. Press Add / Update

The changes are saved.

# **Customer Contact report**

Use the Customer Contact report view customer contact schedules and preferences.

### **Opening the Customer Contact report**

To open the Customer Contact report:

1. Press <sup>A</sup>Customers 2. Press CRM > Maintenance > Contact Reports. 🛃 Sales A Customers Products 👚 Home Vision Company 🖗 Maintenance ۲ 💗 Loyalty ۲ 草 Marketing ۲ 🛗 Schedule ۲ 🗶 CRM ۲ 🖗 Maintenance 🕨 🛃 Company Options 🌅 GSA ۶ 👆 New Customer 🖳 Layby ۲ 🔏 Edit Customer 🧟 Debtors ۲ Customer Reports 🗋 Vouchers ۲ 😺 Contact Reports 🎩 Micro Loan ۲ Customer Orders 🕨 🏠 Home Delivery ۶ 📆 Restaurant ۲ Tipping ۲

The Customer Contact report is displayed.

									Option
Customer	Name	Card	Contact Type	Mobile	Phone	Best Time to Call	Last Contact	Next Contact	Last Con
5035			To Call			Morning	05-May-		Ву
0000			them			moning	2011		Date Rar
5004	BOB BIRD		To Call them		3333333	Morning	10-Feb- 2011	10-Feb- 2011	Date From
5033	Helga		To Call them	+2783459		Morning	16-Feb- 2011	15-Feb- 2011	2/02/201
L100109	Princess	L100109	To Call them			Morning	10-Feb- 2011	01-Jan- 1970	Date To
Count:	4								1/03/201

		000
Option		
Last Cont	act	>
Ву		
Date Ran	ge	>
Date From		
2/02/2010	)	
Date To		
1/03/2016	;	
	Add to Favourites	

# **Customer Contact report key fields**

#### **Filters area**

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Option	Select:
	<ul> <li>Next Contact to filter the report to customers whose Next Contact is within the selected date range.</li> </ul>
	<ul> <li>Last Contact to filter the report to customers whose Last Contact is within the selected date range.</li> </ul>
Ву	Select to display the report for a specific day, week, month or a period specified between two dates.
	<b>Note:</b> Additional fields are displayed to select the specific date period if Between Dates or Date Range is selected.
Date /	Select the date or date period to report on.
Date From and Date To /	
As of /	
Start Date and End Date	

#### **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
Customer ID / Customer	Unique code identifying the customer.
Name / Card / Customer	Name of the loyalty member or customer.
Card # / Card	The card number identifying the loyalty member.
Contact Type	The preferred method of contact for the customer.
Phone	The loyalty member's landline phone number.
Mobile	The loyalty member's mobile phone number.
Best Time to Call	The time of day the customer prefers to be contacted.

	Field	Description
Last Contact		The date the customer was last contacted.
Next Contact		The date the customer is next scheduled to be contacted.

# **Customer Name and Address Extract report**

Use the Customer Name and Address Extract report to download the names and addresses of customers you want to contact.

# **Opening the Customer Name and Address Extract report**

To open the Customer Name and Address Extract report:

- 1. Press <sup>Sea</sup> Customers
- 2. Press **CRM > Maintenance > Contact Reports**.

🏦 Home	🛃 Sales	🧟 Customers 📗	Products 🗧	Vision	📄 Company
		🎤 Maintenance	•		
		💗 Loyalty	•		
		👮 Marketing	•		
		🛗 Schedule	•		
		🧟 CRM	🕨 🎤 Maintena	ance 🕨 📄	Company Options
		🛃 GSA	•	*	New Customer
		🕮 Layby	•	ß	Edit Customer
		🦀 Debtors	•		Customer Reports
		🗋 Vouchers	•		Contact Reports
		🌄 Micro Loan	•		,
		📹 Customer Orders	•		
		🏠 Home Delivery	•		
		📆 Restaurant	•		
		🟆 Tipping	•		

The Customer Name and Address Extract report is displayed.

Selection	Customers	Points	Value	Selection	
Download Names and Addresses	4,530	0.0	\$0.00	Customers	
Total	4,530	0.0	\$0.00	Both	
				Filters	
				None	

# **Customer Name and Address Extract report key fields**

#### **Filters area**

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.

Description				
Select to filter the report to:				
Customers	All customers.			
Loyalty	Loyalty members.			
Accounts	Customers with debtor accounts.			
Layby	Customers who have purchased laybys.			
Customer Orders	Customers who have placed customer orders.			
Home Delivery	Customers who have ordered home delivery.			
Home Shopping	Customers who have purchased from your home shopping site.			
Scheduler	Customers who have made appointments.			
Micro Loan	Customers who have used micro loans.			
Micro Purchase	Customers who have made micro purchases.			
	Customers Loyalty Accounts Layby Customer Orders Home Delivery Home Shopping Scheduler Micro Loan Micro			

	Field	Description
Filter		Select to filter the report by:
		■ State
		<ul> <li>Post code</li> </ul>
		<ul> <li>Names that start with a chosen letter.</li> </ul>

#### **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
Customers	The total number of customers included in the report.
Points	The total balance of loyalty points for the customers included in the report.
Value	The value of the loyalty points for the customers included in the report.

You can manage customers and view their activity with your company such as quotes, laybys, appointments, home delivery and customer orders, as well as linked debtor, loyalty and contact records.

#### Also see:

- *Customer Maintenance screen* on page 130.
- *Site Details report* on page 145.
- *Home Shopping Department report* on page 150.

#### What you can do:

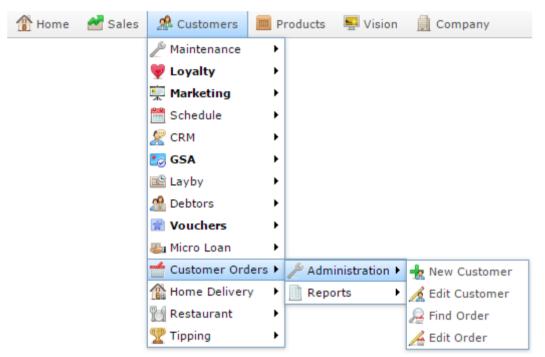
- *Creating a new customer* on page 126.
- *Editing a customer* on page 128.

# Creating a new customer

Create a new customer to track their activity with your company.

To create a new customer:

- 1. Press <sup>Customers</sup>
- 2. Press Customer Orders > Administration > New Customer.



The Find Customer screen is displayed.

Find Customer						
Custom A B C D E F G H I J K L M N Q P Q R S T U V W X Y Z						
Plea	Please choose a field to search on					
Name:						
Customer Number:						
Customer Id:						
Email:						
Mobile:						
Card Number:						
	Search					

3. Search for the customer you want to view or edit.

See Finding a customer on page 99.

The Customer Maintenance screen is displayed.

Customer Mai	ntenance								
Customer Deta	ils CRM	Orders	Quotes	Home Delivery	Laybys	Appointments	Loans	Purchases	
	NEW		_						
First Name:									
Last Name:									
Customer Id:									
Phone:									
Alt Phone:									
Mobile:									
Fax:									
Email:									
Billing Addre	55			Shipping Addr	ess				
Address:				Address:					
							1		
							1		
Post Code:				Post Code:					
Comments:									
connients:									
									Save

- 4. Type the customer's name in the **First Name** and **Last Name** fields.
- 5. If the customer has a record in a linked external accounting system such as Zero, type the customer's ID in the **Customer Id** field
- 6. Press Save

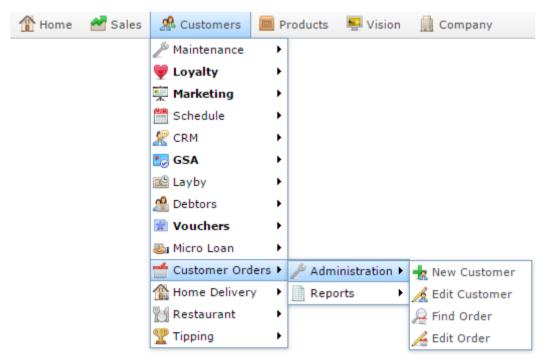
The customer is created.

# **Editing a customer**

Edit a customer to view or change a customer's activity with your business.

To edit a customer:

- 1. Press <sup>Sec</sup> Customers
- 2. Press Customer Orders > Administration > Edit Customer.



The Find Customer screen is displayed.

Find Customer	
	Q P Q B S I U V W X Y Z
Plea	se choose a field to search on
Name:	
Customer Number:	
Customer Id:	
Email:	
Mobile:	
Card Number:	
	Search

3. Search for the customer you want to view or edit.

See Finding a customer on page 99.

The Customer Maintenance screen is displayed.

Customer Ma	intenance										
Customer Deta	ails CRM	Orders	Quotes	Home Delivery	Laybys	Appointments	Loans	Purchases			
Code:	1000219	9				11					
First Name:	Xavier										
Last Name:	Xanatos										
Customer Id:											
Phone:	0945698	725									
Alt Phone:											
Mobile:	0416659	785	7								
Fax:			7								
Email:	XavXan@	email.co	n								
Billing Addre	955			Shipping Add	ress						
Address:				Address:							
,	VIC										
Post Code: 3	3167			Post Code:							
Comments:											
					Save	New Custome	r d 🗂 O	rders Quotes	Create Account	Loyalty	CRM

4. Edit the fields as required.

See Customer Maintenance screen on page 130.

5. Press Save

The customer is created.

# **Customer Maintenance screen**

Use this screen to maintain customer details and interactions with the customer such as marketing contacts, orders, purchases, laybys and quotes.

### **Opening the Customer Maintenance screen**

To open the Customer Maintenance screen:

4 Customers 1. Press 2. Press Customer Orders > Administration > Edit Customer. 🥵 Customers The Home 🚰 Sales Products Nision Company 🖗 Maintenance ۲ 💗 Loyalty ۲ 草 Marketing 🛗 Schedule 🐙 CRM 🌅 GSA 🖳 Layby 🦀 Debtors 🗋 Vouchers ۲ 🎩 Micro Loan ۲ Customer Orders 🕨 Administration 🕨 🚽 New Customer 🏠 Home Delivery 🔏 Edit Customer ۲ Reports 🕅 Restaurant ۲ 🗟 Find Order Tipping ۲ Edit Order

The Find Customer screen is displayed.

Find Customer	
	$ \underline{Q}  \underline{P}  \underline{Q}  \underline{R}  \underline{S}  \underline{T}  \underline{U}  \underline{V}  \underline{W}  \underline{X}  \underline{Y}  \underline{Z} $
Plea	se choose a field to search on
Name:	
Customer Number:	
Customer Id:	
Email:	
Mobile:	
Card Number:	
	Search

3. Search for the customer you want to view or edit.

See Finding a customer on page 99.

The Customer Maintenance screen is displayed.

ustomer Mair										
Customer Detai	ls CRM	Orders	Quotes	Home Delivery	Laybys	Appointments	Loans	Purchases		
Code:	1000219	9								
First Name:	Xavier									
Last Name:	Xanatos									
Customer Id:										
Phone:	0945698	3725								
Alt Phone:										
Mobile:	0416659	9785								
Fax:										
Email:	XavXan@	pemail.co	m							
Billing Addres	5			Shipping Add	ress					
Address:				Address:						
,V	IC									
Post Code: 31	.67			Post Code:						
Comments:										
					🔒 Save	New Custome	r d o	rders Quotes	Create Accour	nt Loyalty CF

# **Customer Maintenance screen key fields and buttons**

#### **Common buttons**

Field	Description
Save	Press to save any changes to the customer details.
New Customer	Press to create a new customer record.
	Press to view customer orders or create a new customer order for this customer.
Quotes	Press to view customer quotes.
Account	Press to view the customer's debtor account.

Field	Description
Create Account	Press to create a linked debtor account for the customer, if it doesn't exist.
Loyalty	Press to view or create the customer's loyalty account.
CRM	Press to view the customer's contact records.

### **Customer details tab**

Use this area to maintain the customer's contact and address details.

Customer Mai	ntenance							
Customer Deta	ils CRM	Orders	Quotes	Home Delivery	Laybys	Appointments	Loans	Purchases
Code:	1000219	9				11		II I
First Name:	Xavier							
Last Name:	Xanatos							
Customer Id:								
Phone:	0945698	725						
Alt Phone:								
Mobile:	0416659	785						
Fax:								
Email:	XavXan@	email.co	m					
Billing Addre	55			Shipping Add	lress			
Address:				Address:				
٨	/IC							
Post Code: 3	167			Post Code:				
Comments:								
					Save	New Custome	r 📄 📹 O	Orders Quotes Create Account Loyalty CRM

Field	Description
Code	Unique code identifying the customer.
First Name	Customer's first name.
Last Name	Customer's last name.
Customer Id	Customer's ID number in any linked external accounting system you may use, such as Zero. If you do not have an external system linked, you can ignore this field.
Phone	Customer's phone number.

Field	Description
Alt Phone	Customer's alternate phone number.
Mobile	Customer's mobile number.
Fax	Customer's fax number.
Email	Customer's email address.
Billing Address	Customer's billing address and post code.
Shipping Address	Customer's shipping address and post code.
Comments	Any comment regarding the customer.

#### **CRM tab**

Use this area to view the contact activity with the customer.

Customer Mainte	nance										
Customer Details	CRM	Orders	Quotes	Home Delivery	Laybys	Appointments	Loans	Purchases			
Last Contact:	1/07	/2010		-							
Next Contact:	1/07	/2010		-							
Contact:	Calle	d Custom	ier	-							
Date			Contac	t		User			Comment		
No Contact											*
											Ŧ
				🖬 Sav	e New	Customer	Orders	Quotes	reate Account	Create Loyalty	CRM

Field	Description
Date	Date the customer was contacted.
Contact	Type of contact that occurred.
User	The name of the Portal who contacted the customer.
Comment	Any comments on the customer contact.

#### **Orders tab**

Use this area to maintain the customer's orders.

CRM Ord	uotes Site	Home Deliv		Laybys Ordered	Appointment Due Date		rotal	ases \$0.00	Deposit \$0.00	Balance ) \$	0.00
Status	Site	[	Date (	Drdered	Due Date		Total	\$0.00			0.00
								\$0.00	\$0.00	) \$	0.00
			Save	New	Customer	f Order	Quote	es Cr	eate Account	Create Loyalty	CRM
				<b>□</b> Save	Save New	Save New Customer	Save New Customer	Rave New Customer dorders Quot	Save New Customer duotes Cr	Save New Customer Orders Quotes Create Account C	Save New Customer Orders Quotes Create Account Create Loyalty

Field	Description
Order Number	Unique number identifying the order.
Status	The status of the order.
Site	The site the order was made.
Date Ordered	Date the order was made.
Due Date	Date the order is due to be collected or delivered.
Total	Total amount of the order.

Field	Description
Deposit	Deposit of the order made.
Balance	Balance of the amount still due.

### Quotes tab

Use this area to maintain the customer's quotes.

Customer Maintenance												
Customer Details	CRM	Orders	Quotes	Home Delivery	Laybys	Appointments	Loans	Purchases				
Quote Number		Status		Site		Quote Date		Expiry Dat	e	Total		
<u>14</u>		Pending		North Aver	nue	2	1-Oct-2008	3	20-Nov-2008		\$89.50	-
												_
				🔒 Sav	New	Customer d	Orders	Quetes C	reate Account	Create Lo		DM
				En Sav	New	Customer	orders	Quotes	reate Account	Create Lo	byaity Ch	RM

Field	Description
Quote Number	Unique number identifying the quote.
Status	Status of the quote.
Site	Site the quote came from.
Quote Date	Date the quote was created.
Expiry Date	Date the quote is valid until.
Total	Total price of the quote.

### Home Delivery tab

Use this area to maintain orders for home delivery.

Customer Details CRM	Orders	Quotes	Home Deliver	Laybys	Appointments	Loans	Purchases				
Delivery Number		Delivered				Delive	ry Date		Delivery Fee		Γ
<u>4</u>	No			Master Site	e (Site 14)		20-	Oct-2008		\$0.00	•
3	No			Master Site	e (Site 14)		02-	Oct-2008		\$5.00	

Field	Description
Delivery Number	Unique code identifying the delivery.
Delivered	Indicates whether the home delivery was delivered.
Site	Site the home delivery was ordered from.
Delivery Date	Date the delivery was due.
Delivery Fee	Any fee charged for the delivery.

# Laybys tab

Use this area to maintain the customer's laybys.

Customer Details	CRM	Orders	Ouotes	Home Delivery	Lavbys	Appointment	s Loans	Purchase	es	
Layby Number				Site			Due By		Layby Fee	Balance
<u>56</u>	Yes		Yes North Aven			05-Jan-2007	16-	Feb-2007	\$0.00	\$0.00
52	Yes		ſ	North Avenue		04-Jan-2007	15-	Feb-2007	\$0.00	\$7.00
204	No		1	North Avenue		04-Jan-2007	15-	Feb-2007	\$0.00	\$3.85
205	Yes		ſ	North Avenue		04-Jan-2007	15-	Feb-2007	\$0.00	\$33.95

Field	Description
Layby Number	Unique code identifying the layby.
Collected	Whether the layby has been collected by the customer.
Site	Site the layby was created at.
Layby Date	Date the layby was created.
Due By	Date the last layby payment was due.
Layby Fee	Any layby fee charged.

]	Field	Description
Balance		Any balance still to be paid on the layby.

### Appointments tab

Use this area to maintain the customer's appointments.

Customer Maintenance											
Customer Details	CRM	Orders	Quotes	Home Delivery	/ Laybys	Appointment	Loans	Purchases			
Site		Date	9		Time	-	Sched	ule	Comm	nent	
FLC		<u>20-9</u>	Sep-2015		10:30		Salon				*
Master Site (Site 1	14)	<u>21-0</u>	0ct-2008		09:30		Salon				
											Ŧ
				🖬 Sa	ve New	Customer	f Orders	Quotes	Create Account	Create Loyalty	CRM

Field	Description
Site	Site the appointment is scheduled for.
Date	Date the appointment is scheduled.
Time	Time the appointment is scheduled.
Schedule	The department the appointment is scheduled with.
Comment	Any comment on the appointment.

#### Loans tab

Use this area to maintain the customer's loans.

_	Custome <mark>r Maint</mark> e	nance	9											
[	Customer Details	CRM	Orders	Quotes	Home Delivery	Laybys	Арро	intments	Loans	Purchase	S			
	Loan Number		Status		Site		Lo	an Date		Expiry (	Date	Principle		
	3		Active		Master Sit	e (Site 14)		1	0-Oct-200	08	10-Nov-2008		\$100.00 ^	
													_	
					🖬 Sa	ve New	Custor	mer 🥌	Orders	Quotes	Create Account	Create Loya	Ity CRM	
										4.000				1

Field	Description
Loan Number	Unique code identifying the loan.
Status	Status of the loan.
Site	Site the loan was issued from.
Loan Date	Date the loan was issued.
Expiry Date	Date the final payment is due.
Principle	Initial loan amount.

#### **Purchases tab**

Use this area to maintain the customer's second-hand good purchases.

Customer Maintenance				
Orders Quotes Home Deliver	y Laybys Appointments	Loans Purchases		
Status	Site	Purchase Date	Total	
Α	Master Site (Site 14)	13-Oct-2008	\$82.50	
	Status	Status Site	Status Site Purchase Date	

Field	Description
Purchase Number	Unique code identifying the purchase.
Status	Status of the purchase.
Site	Site the purchase was made at.
Purchase Date	Date the purchase occurred.
Total	Total dollar amount of the purchase.

### **Site Details report**

Use the Site Details report to view a list of customers by site.

### **Opening the Site Details report**

To open the Site Details report:

- 1. Press Customers from the menu bar.
- 2. Press **Customer Orders > Reports > Customers**.

👚 Home  🛃 Sales	🧟 Customers 📔	Produ	cts 🛛 💀 Vision	Company	🕙 History
		•			
	W Loyalty				
	m Schedule				
	K CRM				
	GSA				
	📸 Layby				
	A Debtors				
	R Vouchers				
	🏭 Micro Loan				
	🛫 Customer Order	st pi	Administration <b>•</b>		
	1 Home Delivery	•	Reports 🕨	A Customers	
	Restaurant	•		🗧 Summary	
	Tipping			Orders (Due)	
	L			Prep List	
				Picking List	
				Home Shopping	Department

The Site Details report is displayed.

#### Site Details

Name	Site	Address	Suburb	State	Post Code	Phone	Mobile	Fax	Email
Applesee	Chadstor	1 Applesee Way, Orchard Grove	Victoria		3444	98765432	98864322		info@app
Bird, Bob	Chadstor	This street	Waverley		3150	04111033			birdrc@y
Burberry,	Chadstor	91 Garden Ave, Gardenvi	VIC		3699	9998787			ABurberry
Custome	Chadstor					3			
Custome	Chadstor								
Custome	Chadstor								
Custome	Chadstor								
Custome	Chadstor					4			
Custome	Chadstor					2			
Custome	Chadstor					123456			
Custome	Chadstor					4			
Pearson,	Chadstor	123 Street Road, Suburbvil	VIC		3649	9999 9999			ingo@arr

Add to Favourites

# **Site Details report key fields**

#### **Filters area**

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

Description
Press to add this report to your Portal favourites for easier access.
Select the site or sites to report on.

#### **Report area**

This area displays report information.

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

Field	Description				
Site / Description	The name of the relevant site.				
Name /	Name of the debtor or customer.				
Customer /					
Customer Name /					
Debtor					
Address	Customer's address.				
Suburb	Customer's suburb.				
State	Customer's state.				
Post Code	Customer's post code.				
Phone	Customer's phone number.				
Mobile	Customer's mobile number.				

	Field	Description
Fax		Customer's fax number.
Email		Customer's email address.

# **Home Shopping Department report**

Use the Home Shopping Department report to view home shopping departments.

### **Opening the Home Shopping Department report**

To open the Home Shopping Department report:

- 1. Press Customers from the menu bar.
- 2. Press Customer Orders > Reports > Prep List.

/ Maintenance	•			
V Loyalty				
Marketing	•			
Chedule Schedule	•			
K CRM	•			
🐻 GSA	•			
🖺 Layby	•			
🔗 Debtors	•			
🖹 Vouchers	•			
🏭 Micro Loan	•			
🛫 Customer Orders	s 🕨 🎤 Ad	ministration +		
Home Delivery	Re	ports 🕨	🥵 Customers	
Restaurant	•		두 Summary	
Tipping	•		🔮 Orders (Due)	
			Prep List	
			Picking List	
			Mome Shopping Depa	rtment

Home Shop	ping Department	Report	(*	:
			Site	
Department Id	Department Description	Enabled	iZenPos	>
			Add to Favourites	Create New Home Shopping Department

### Home Shopping Department report key fields

#### **Filters area**

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

Field	Description			
Add to Favourites	Press to add this report to your Portal favourites for easier access.			
Create New Home Shopping Department	Press to create a new Home Shopping department.			
Site /	Select the site or sites to report on.			
Sites				

#### **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			
Department Id	Unique code identifying the department.			
Description / Department Description	Description of the department.			
Enabled	Indicates whether the department can be used by the Portal.			

Customers can use laybys to pay off a set of items over a period of time. Laybys have a set expiry date that they must be paid in full by, after which the customer usually forfeits the items and their payments.

**Note:** You cannot create laybys on the Portal. Laybys must be created and paid for using a Point of Sale.

#### See:

- Layby Customer Details report on page 186.
- *Customer Layby report* on page 182.
- *Customer Lay-by screen* on page 172.

#### What you can do:

- *Editing a layby* on page 154.
- *Adding items to a layby* on page 156.
- *Changing the price of items in a layby* on page 159.
- *Editing the quantity of items in a layby* on page 162.
- *Removing items from a layby* on page 165.
- *Delivering a layby* on page 168.
- *Cancelling a layby* on page 170.

# **Editing a layby**

Edit a layby to change the items, customer details or delivery instructions.

Note: Laybys are created at the Point of Sale and signed by the customer. Editing the layby may invalidate the conditions signed. Only edit laybys to correct an error or if you are cancelling the layby.

To edit a layby:

- 1. Press <sup>A</sup> Customers
- 2. Press Layby > Maintenance > Find Layby.

👚 Home	🛃 Sales	🧟 Customers	Pro	oducts	硻 Visior	n 🚊 Company
		🎤 Maintenance	•			
		💗 Loyalty	•			
		👮 Marketing	•			
		🛗 Schedule	+			
		🧟 CRM	+			
		誤 GSA	+			
		🖻 Layby	•	🎤 Mai	ntenance 🕨	🕂 👷 New Customer
		🆀 Debtors	•	📄 Rep	orts	🖌 Edit Customer
		🗋 Vouchers	•	🖂 Mai	Out 🕨	🖳 🖳 Find Layby
		🍇 Micro Loan	•	📕 SMS	5 Out 🔹 🕨	🖌 Edit Layby
		📹 Customer Or	ders ▶	🗟 Ema	ail Out 🔹 🕨	,
		🏦 Home Delive	ry ⊢			-
		👸 Restaurant	•			
		🟆 Tipping	•			

The Search for Customer Layby screen is displayed.

Searc	h for Cu	stome	er Lay-	by		0	*	
Layby	Customer	Account	Status	Layby Date	Expiry Date	Delivery	Site	
Number	Name	Number	Status	Layby Date	Expiry Date	Date	Chadstone	>
6	Burberry, Ains	5002	Expired	2015-07-27	2015-09-07		Layby Number	
							6	
							Add to Favourites Search	

1

3. Search for the layby you want.

The Customer Lay-by screen is displayed.

Customer Lay-by				
Customer: Willcocks, Chris				
Code: 5002				
Layby Number: 6	Total:	\$67.96		
Location: Chadstone 💌	Paid:	\$6.8		
	Total To Pay:	\$61.16		
	Order Status:	Pending		
Customer Details Items Payments				
Code: 5002				
First Name: Chris				
Last Name: Willcocks				
Phone: 9998787				
Mobile:				
Fax:				
Delivery Address:				
91 Garden Ave				
Gardenvilla				
VIC				
Post Code: 3,65	1			
	🚔 Print 🛛 Upda	te Details	Delivered	Cancel Layby

4. Make the required changes.

See *Customer Lay-by screen* on page 172.

5. Press Update Details

The changes are saved.

# Adding items to a layby

Add items to a layby to include them in the customer's purchase.

**Note:** Laybys are created at the Point of Sale and signed by the customer. Editing the layby may invalidate the conditions signed. Only edit laybys to correct an error or if you are cancelling the layby.

To add items to a layby:

- 1. Press <sup>A</sup> Customers
- 2. Press Layby > Maintenance > Find Layby.

👚 Home	🛃 Sales	🧟 Customers	Pro	oducts	🖳 Visior	n 🚊 Company
		🎤 Maintenance	×			
		💗 Loyalty	•			
		👮 Marketing	•			
		🛗 Schedule	+			
		🧟 CRM	×			
		🛃 GSA	•			_
		🖻 Layby	•	🎤 Maii	ntenance I	👷 New Customer
		🔏 Debtors	•	📄 Rep	orts	🖌 Edit Customer
		🗋 Vouchers	•	🖂 Mail	Out	🖳 Find Layby
		🍇 Micro Loan	•	📕 SMS	Out I	🖌 Edit Layby
		📹 Customer Or	ders⊁	🗟 Ema	ail Out 🔰	•
		🏦 Home Delive	ry ⊢			_
		👸 Restaurant	•			
		🟆 Tipping	•			

The Search for Customer Layby screen is displayed.

Search for Customer Lay-by						*			000
Layby Number	Customer Name	Account	Status	Layby Date	Expiry Date	Delivery Date	Site Chadstone		>
6	Burberry, Ains	5002	Expired	2015-07-27	2015-09-07		6		
							Add to Favourites	Search	

3. Search for the layby you want.

The Customer Lay-by screen is displayed.

Customer Lay-by	<b>/</b>					
Customer: W	Villcocks, Chris					
Code: 5	002					
Layby Number: 6	5	*	Total:	\$67.96		
Location: C	Chadstone	*	Paid:	\$6.8		
			Total To Pay:	\$61.16		
			Order Status:	Pending		
Customer Details	s Items Payments					
Code: 500	2					
First Name: Chri	is					
Last Name: Will	looks					
Phone: 999	98787					
Mobile:						
Fax:						
Delivery Address:						
91 Garden Ave						
Gardenvilla						
VIC						
Post Code: 3,65						
			😹 Print 🛛 Upda	te Details	Delivered	Cancel Layby

4. Press the Items tab.

The items tab is displayed.

Customer Lay-b	ny i					
Customer:	Willcocks	s, Chris				
Code:	5002					
Layby Number:	6	-		Tota	l: \$67.96	
Location:	Chadstor	ne -		Pai	d: \$6.8	
				Total To Pa	y: \$61.16	
				Order Statu	s: Pending	
Customer Deta	ils Item	ns Payments				
Item Code:			*			
		🔎 Find 🛛 🕂 Add				
Descriptions						
Description: Unit Price:						
Description	1	Item	Price	Discount	Quantity	Line Total
Annies Lane Chardonnay	1	9000	\$16.99	\$0	4	\$67.96
						Q Update — Delet

5. Search for the item you want to add in the **Item Code** field.

See Finding an item with a search field.

6. Press + Add

The item is added to the item grid.

7. Press the **Quantity** field of the item.

	by						
Customer:	Willcocks	s, Chris					
Code:	5002						
Layby Number:	6	*		Tota	l: \$67.96		
Location:	Chadsto	one -		Pal	d: \$6.8		
				y: \$61.16			
				Order Statu	s: Pending		
Customer Deta	ails Iten	ms Payments					
Item Code:			*				
		🔎 Find 🛛 🕂 Ad					
Description:							
Unit Price: Description		Item	Price	Discount	Quantity	Line Total	_
		9000	\$16.99		Quantity 4		; ÷
Annies Lane		9000					
Annies Lane Chardonnay		9000	11111				
		9000				]	
		4000					
		9000					
		9000				]	
		9000					Ŧ
		9000				Q Update - Dek	÷

- 8. Type the number of units you want to add to the layby.
- 9. Press Q Update
- 10. Press Update Details

The changes are saved.

### Changing the price of items in a layby

Change the price of items in a layby if you want to offer the customer a different price to the normal price they would receive.

**Note:** Laybys are created at the Point of Sale and signed by the customer. Editing the layby may invalidate the conditions signed. Only edit laybys to correct an error or if you are cancelling the layby.

To change the price of items in a layby:

- 1. Press <sup>Sea</sup> Customers
- 2. Press Layby > Maintenance > Find Layby.

👚 Home 🛛 🛃 Sales	🧟 Customers	🥅 Products 🛛 🖳 Vision 🌐 Company
	🎤 Maintenance	<b>&gt;</b>
	💗 Loyalty	•
	👮 Marketing	•
	🛗 Schedule	•
	🦉 CRM	•
	🌄 GSA	<b>&gt;</b>
	🗠 Layby	🕨 🎤 Maintenance 🕨 ሗ New Customer
	🦀 Debtors	🕨 📄 Reports 🔹 🥖 Edit Customer
	🛒 Vouchers	🕨 🖂 Mail Out 🔹 🔏 Find Layby
	🍇 Micro Loan	🕨 🧾 SMS Out 🔹 🔏 Edit Layby
	d Customer Ord	lers 🕨 🔛 Email Out 🔹
	🏦 Home Delivery	y F
	📷 Restaurant	•
	🟆 Tipping	•

The Search for Customer Layby screen is displayed.

Searc	h for Cu	stome	er Lay-l	by		(	×	:
Layby Number	Customer Name	Account Number	Status	Layby Date	Expiry Date	Delivery Date	Site Chadstone	>
6	Burberry, Ains	5002	Expired	2015-07-27	2015-09-07		Layby Number	
							6	
							Add to Favourites	Search

3. Search for the layby you want.

The Customer Lay-by screen is displayed.

Customer Lay	-bү				
Customer:	Willcocks, Chris				
Code:	5002				
Layby Number:	6 -	Total:	\$67.96		
Location:	Chadstone -	Paid:	\$6.8		
		Total To Pay:	\$61.16		
		Order Status:	Pending		
Customer Det	tails Items Payments				
Code: 5	002				
First Name:	Chris				
Last Name:	Willcocks				
Phone: 9	9998787				
Mobile:					
Fax:					
Delivery Addre	55:				
91 Garden Ave	e				
Gardenvilla					
VIC					
Post Code: 3,	20,				
		😹 Print Upda	te Details	Delivered	Cancel Layby

4. Press the Items tab.

The items tab is displayed.

Customer Lay-	by					
Customer:	Willcocks	, Chris				
Code:	5002					
Layby Number:	6	-		Tot	al: \$67.96	
Location:	Chadstor	ne 👻		Pai	d: \$6.8	
				Total To Pa	y: \$61.16	
				Order Statu	s: Pending	
Customer Det	ails Item	Payments				
Item Code:						
Description :		P Find 🕂 Ad	a			
Unit Price:						
Description	I	Item	Price	Discount	Quantity	Line Total
Annies Lane Chardonnay	5	9000	\$16.99	\$0	4	\$67.96 ^
						-
						Q Update 🛛 🗕 Delete

5. Press the **Price** field of the item you want to change.

Customer Lay-by								
Customer: Willcom	ks, Chris							
Code: 5002								
Layby Number: 6	*		Tota	al: \$67.96				
Location: Chads	tone 👻		Pai	d: \$6.8				
			Total To Pa	y: \$61.16				
			Order Statu	s: Pending				
Customer Details It	ems Payments							
Item Code:								
	🔎 Find 🛛 🕂 Add							
Description :								
Unit Price:								
Description	Item	Price	Discount	Quantity	Line Total			
Annies Lane Chardonnay	9000	\$16.99	\$0	4	\$67.96 ^			
					-			
· · · · · · · · · · · · · · · · · · ·					Q Update — Delete			
			😹 Print 🛛 Up	date Details Delive	Cancel Layby			

- 6. Type the unit price you want to charge the customer in this layby.
- 7. Press Q Update
- 8. Press Update Details

The changes are saved.

### Editing the quantity of items in a layby

Edit the quantity of items to include more or fewer units of an item in a layby.

**Note:** Laybys are created at the Point of Sale and signed by the customer. Editing the layby may invalidate the conditions signed. Only edit laybys to correct an error or if you are cancelling the layby.

To edit the quantity of items in a layby:

- 1. Press <sup>A</sup> Customers
- 2. Press Layby > Maintenance > Find Layby.

👚 Home	🛃 Sales	🧟 Customers	Pro	oducts	🖳 Visio	n 🚊 Company
		🎤 Maintenance	•			
		💗 Loyalty	•			
		👮 Marketing	•			
		🛗 Schedule	+			
		🦉 CRM	+			
		🛃 GSA	+			
		🖺 Layby	•	🎤 Main	tenance	🖢 📩 New Customer
		🔏 Debtors	•	📄 Rep	orts	🕨 🔏 Edit Customer
		🗋 Vouchers	•	🖂 Mail	Out	Rind Layby
		🍇 Micro Loan	•	嵐 SMS	Out	Edit Layby
		📹 Customer Or	ders ⊁	🗟 Ema	il Out	
		🏦 Home Delive	ry ⊢			-
		👸 Restaurant	•			
		🟆 Tipping	•			

The Search for Customer Layby screen is displayed.

Searc	h for Cu	stome	er Lay-l	*			:		
							Site		
Layby Number	Customer Name	Account Number	Status	Layby Date	Expiry Date	Delivery Date	Chadstone		>
6 Burberry,Ain		5002	Expired	2015-07-27	2015-09-07		Layby Number		
							6		
							Add to Favourites	Search	

3. Search for the layby you want.

The Customer Lay-by screen is displayed.

Customer Lay-by	<b>/</b>					
Customer: W	Villcocks, Chris					
Code: 5	002					
Layby Number: 6	5	*	Total:	\$67.96		
Location: C	Chadstone	*	Paid:	\$6.8		
			Total To Pay:	\$61.16		
			Order Status:	Pending		
Customer Details	s Items Payments					
Code: 500	2					
First Name: Chri	is					
Last Name: Will	looks					
Phone: 999	98787					
Mobile:						
Fax:						
Delivery Address:						
91 Garden Ave						
Gardenvilla						
VIC						
Post Code: 3,61						
			😹 Print 🛛 Upda	te Details	Delivered	Cancel Layby

4. Press the Items tab.

The items tab is displayed.

Customer Lay-b	Y								
Customer:	Willcocks, Chris								
Code:	5002								
Layby Number:	6	-			Tota	l: \$67.96			
Location:	Chadstone	-			Pak	1: \$6.8			
				Total	To Pa	: \$61.16			
				Order	Statu	: Pending			
Customer Detai	ils Items Payments								
Item Code:		-							
	P Find	+ Add							
Description :	(								
Unit Price:									
Description	Item	Price		Discount		Quantity	Line	Total	
Annies Lane Chardonnay	9000		\$16.99		\$0		4	\$67.96	5 -
									-
								Q Update 📃 — Del	÷

5. Press the **Quantity** field of the item you want to edit.

	by .										
Customer:	Willcocks	s, Chris									
Code:	5002										
Layby Number:	6		-			Tota	l: \$67.96				
Location:	Chadsto	ne	-			Pai	d: \$6.8				
					Total	To Pa	v: \$61.16				
					Order	Statu	s: Pending				
Customer Deta	ils Iten	15 Payments									
Item Code: Description:		₽ Find +	- Add								
Unit Price:											_
Description		Item	Price		Discount		Quantity	-	Line Total		
Annies Lane Chardonnay		9000		\$16.99		\$0		4		\$67.96	1
									Ollow	date 🗌 🗕 Dele	,

- 6. Type the number of units you want to include in the layby.
- 7. Press Q Update
- 8. Press Update Details

The changes are saved.

# **Removing items from a layby**

Remove items from a layby to remove them from the customer's purchase.

**Note:** Laybys are created at the Point of Sale and signed by the customer. Editing the layby may invalidate the conditions signed. Only edit laybys to correct an error or if you are cancelling the layby.

#### To remove items from a layby:

- 1. Press <sup>Sh</sup> Customers
- 2. Press Layby > Maintenance > Find Layby.

👚 Home	🚰 Sales	🧟 Customers	🕅 Pro	oducts	🖳 Vision	🚊 Company
		🎤 Maintenance	•			
		💗 Loyalty	•			
		👮 Marketing	•			
		🛗 Schedule	•			
		🧏 CRM	•			
		🌅 GSA	•			
		🗠 Layby	•	🎤 Mair	ntenance 🕨	📩 New Customer
		🦀 Debtors	•	📄 Rep	orts 🕨 🕨	🔏 Edit Customer
		🗋 Vouchers	•	🖂 Mail	Out 🔹 🕨	<u> Find Layby</u>
		🍇 Micro Loan	•	📕 SMS	S Out 🔹 🕨	🛵 Edit Layby
		📹 Customer Ord	ders ►	🗟 Ema	ail Out 🔹 🕨	
		🏦 Home Deliver	ry 🕨			-
		👩 Restaurant	•			
		🏆 Tipping	•			

The Search for Customer Layby screen is displayed.

Searc	h for Cu	stome	er Lay-l	by		*		:
							Site	
Layby Number	Customer Name	Account Number	Status	Layby Date	Expiry Date	Delivery Date	Chadstone	>
6	Burberry, Ains	5002	Expired	2015-07-27	2015-09-07		Layby Number	
							6	
							Add to Favourites Sear	rch

3. Search for the layby you want.

The Customer Lay-by screen is displayed.

Customer Lay-	by				
Customer:	Willcocks, Chris				
Code:	5002				
Layby Number:	6 -	Total:	\$67.96		
Location:	Chadstone -	Paid:	\$6.8		
		Total To Pay:	\$61.16		
		Order Status:	Pending		
Customer Det	ails Items Payments				
Code: 5	002				
First Name: C	hris				
Last Name: V	Villcocks				
Phone: 9	998787				
Mobile:					
Fax:					
Delivery Addres	151				
91 Garden Ave	2				
Gardenvilla					
VIC					
Post Code: 3,	65				
		😹 Print 🛛 Upda	te Details	Delivered	Cancel Layby

4. Press the Items tab.

The items tab is displayed.

	by						
Customer:	Willcocks	s, Chris					
Code:	5002						
Layby Number:	6	-		Tota	al: \$67.96		
Location:	Chadsto	me -		Pai	d: \$6.8		
				Total To Pa	y: \$61.16		
				Order Statu	s: Pending		
Customer Deta	ails Iten	ns Payments					
Item Code:			*				
		🔎 Find 🛛 🕂 Add					
Descriptions							
Description : Unit Price:							
				- 1		Line Total	-
Description		Item	Price	Discount	Quantity	Line Total	
		Item 9000	Price \$16.99	Discount \$0	Quantity 4		*
Description Annies Lane							*
Description Annies Lane							
Description Annies Lane							
Description Annies Lane							
Description Annies Lane							*
Description Annies Lane							Ŧ

5. Press the item you want to remove in the item grid.

	bγ								
Customer:	Willcocks, Chris								
Code:	5002								
Layby Number:	6	-			Tota	l: \$67.96			
ocation:	Chadstone	-			Pak	1: \$6.8			
				Total	To Pay	: \$61.16			
				Order	Status	: Pending			
Sustamar Date	ails Items Payment	*				_			
Item Code:	🔎 Fin	d 🛨 Add							
Unit Price:	Item	Price		Discount		Ouantity		Line To	tal
Unit Price: Description Annies Lane	Item 9000	Price	\$16.99	Discount	\$0	Quantity	4	Line To	tal \$67.96
Description : Unit Price: Description Annies Lane Chardonnay		Price		Discount	_	Quantity	4		

7. Press Update Details

6.

The changes are saved.

# **Delivering a layby**

Mark a layby as delivered if you have completed payment and the customer has received the items.

**Note:** Laybys are usually paid for and collected at the Point of Sale, which automatically marks the layby as complete and delivered.

To deliver a layby:

- 1. Press <sup>A</sup> Customers
- 2. Press Layby > Maintenance > Find Layby.

👚 Home	🛃 Sales	🧟 Customers	🥅 Pro	oducts	硻 Vision	🚊 Company
		🎤 Maintenance	•			
		💗 Loyalty	•			
		👮 Marketing	•			
		🛗 Schedule	•			
		🦉 CRM	•			
		🔝 GSA	•			
		🗠 Layby	•	🎤 Mair	ntenance 🕨	📩 New Customer
		🦀 Debtors	•	📄 Rep	orts 🔹 🕨	🔏 Edit Customer
		🗋 Vouchers	•	🖂 Mail	Out 🔹 🕨	<u> Find Layby</u>
		🍇 Micro Loan	•	📕 SMS	S Out 🔹 🕨	🔏 Edit Layby
		📹 Customer Ord	lers ⊁	🗟 Ema	ail Out 🔹 🕨	
		🏦 Home Deliver	y ≻			-
		📆 Restaurant	•			
		🟆 Tipping	•			

The Search for Customer Layby screen is displayed.

Searc	h for Cu	stome	er Lay-l	by		*			
Layby Number	Customer Name	Account	Status	Layby Date	Expiry Date	Delivery Date	Site		>
6	Burberry, Ains		Expired	2015-07-27	2015-09-07	Cale	Layby Number		
							6		
							Add to Favourites	Search	

3. Search for the layby you want.

The Customer Lay-by screen is displayed.

Customer Lay-	bγ					
Customer:	Willcocks, Chris					
Code:	5002					
Layby Number:	6	-	Total:	\$67.96		
Location:	Chadstone	*	Paid:	\$6.8		
			Total To Pay:	\$61.16		
			Order Status:	Pending		
Customer Det	ails Items Payments					
Code: 5	002					
First Name: 0	hris					
Last Name: V	Villcocks					
Phone: 9	998787					
Mobile:						
Fax:						
Delivery Addres	s:					
91 Garden Ave	3					
Gardenvilla						
VIC						
Post Code: 3,	65					
			😹 Print Upda	te Details	Delivered	Cancel Layby

4. Press Delivered

The layby is delivered.

# **Cancelling a layby**

Cancel a layby to remove it from the Portal.

**Note:** Cancelling a layby forfeits the deposit and any other amounts paid. If you want to refund the customer the amount paid to their layby, you must create a refund in the Portal.

To cancel a layby:

- 1. Press <sup>A</sup> Customers
- 2. Press Layby > Maintenance > Find Layby.

👚 Home	🛃 Sales	🧟 Customers	🔲 Pro	oducts	🕎 Vision	🚊 Company
		🎤 Maintenance	×			
		💗 Loyalty	•			
		👮 Marketing	•			
		🛗 Schedule	•			
		🥷 CRM	•			
		🛃 GSA	•			
		🖻 Layby	•	🎤 Mai	ntenance 🕨	📩 New Customer
		🔏 Debtors	•	📄 Rep	oorts 🔹 🕨	🔏 Edit Customer
		🗋 Vouchers	•	🖂 Mai	l Out 🔹 🕨	💂 Find Layby
		🍇 Micro Loan	•	📕 SMS	S Out 🔹 🕨	🔏 Edit Layby
		📹 Customer Ore	ders ⊁	🗟 Ema	ail Out 🔹 🕨	
		🏦 Home Deliver	ry ►			
		👩 Restaurant	•			
		🟆 Tipping	•			

The Search for Customer Layby screen is displayed.

Searc	h for Cu	stome	er Lay-l	by		*			000
Layby Number	Customer Name	Account	Status	Layby Date	Expiry Date	Delivery Date	Site Chadstone		>
6	Burberry, Ains	5002	Expired	2015-07-27	2015-09-07		Layby Number		
							Add to Favourites	Search	

3. Search for the layby you want.

The Customer Lay-by screen is displayed.

Customer Lay-	by		
Customer:	Willcocks, Chris		
Code:	5002		
Layby Number:	6	*	Total: \$67.96
Location:	Chadstone	-	Paid: \$6.8
		Total To	Pay: \$61.16
		Order St	tatus: Pending
Customer Det	ails Items Payments		
Code: 5	002		
First Name: 0	Thris		
Last Name: V	Villcocks		
Phone: 9	998787		
Mobile:			
Fax:			
Delivery Addres	55:		
91 Garden Ave	9		
Gardenvilla			
VIC			
Post Code: 3,			
Post code: 3,	101		
		🚒 Print	Update Details Delivered Cancel Layby

4. Press Cancel Layby

The layby is cancelled.

# **Customer Lay-by screen**

Use this screen to edit and create laybys.

#### **Opening the Customer Lay-by screen**

To open the Customer Lay-by screen:

🥵 Customers 1. Press 2. Press Layby > Maintenance > Find Layby. 🚰 Sales 👚 Home A Customers Products 🔛 Vision Company Maintenance ۲ 💗 Loyalty ۲ 草 Marketing Þ 🛗 Schedule ۲ 🖉 CRM Þ 🌅 GSA ۲ 🗳 Layby ۲ Maintenance 🕨 👆 New Customer 🧟 Debtors ۶ Reports 🔏 Edit Customer ۲ 🗋 Vouchers 🔎 Find Layby ۶ 🖂 Mail Out 🌄 Micro Loan ۶ 👢 SMS Out 🔏 Edit Layby ۲ Customer Orders 🕨 🔜 Email Out ۲ 🏠 Home Delivery ۲ ۲ 🕅 Restaurant 🥐 Tipping ۲

The Search for Customer Layby screen is displayed.

							Site	
Layby Number	Customer Name	Account Number	Status	Layby Date	Expiry Date	Delivery Date	Chadstone	
6	Burberry, Ains	5002	Expired	2015-07-27	2015-09-07		Layby Number	
							6	
							6	

3. Search for the layby you want.

The Customer Lay-by screen is displayed.

Customer Lay	-by					
Customer:	Willcocks, Chris					
Code:	5002					
Layby Number:	6	*	Total:	\$67.96		
Location:	Chadstone	*	Paid:	\$6.8		
			Total To Pay:	\$61.16		
			Order Status:	Pending		
Customer De	tails Items Payments					
Code: 5	002					
First Name:	Chris					
Last Name:	Willcocks					
Phone:	9998787					
Mobile:						
Fax:						
Delivery Addre	55:					
91 Garden Av	e					
Gardenvilla						
VIC						
Post Code: 3	64					
Post Code: 3	101					
			😹 Print Upda	te Details	Delivered	Cancel Layby

# **Customer Lay-by screen key fields and buttons**

### **Common fields and buttons**

Field	Description
Customer	Name of the customer who has ordered the layby.
Code	Unique code identifying the customer.
Layby Number	Code identifying the layby. You can select another layby from this customer.
Location	The site the layby was created at.
Total	The total value of the layby.

Field	Description
Paid	The amount of the total value the customer has paid.
Total To Pay	The amount of the total value the customer has yet to pay.
Order Status	The status of the layby. For example, <b>Expired</b> or <b>Pending</b> .
🚔 Print	Press to print the layby.
Update Details	Press to save any changes made to the layby.
Delivered	Press to mark the layby as delivered.
Cancel Layby	Press to cancel this layby.

#### **Customer tab**

Use this area to maintain the customer details for the layby.

Customer Lay	-by					
Customer:	Willcocks, Chris					
Code:	5002					
Layby Number:	6	-	Total:	\$67.96		
Location:	Chadstone	*	Paid:	\$6.8		
			Total To Pay:	\$61.16		
			Order Status:	Pending		
Customer Del	tails Items Payments					
Code: 5	002					
First Name:	Chris					
Last Name:	Willcocks					
Phone: 9	9998787					
Mobile:						
Fax:						
Delivery Addre	SS:					
91 Garden Av	e					
Gardenvilla						
VIC						
Post Code: 3,	60					
Post Code: 3,	.01					
			Print Upda	te Details	Delivered	Cancel Layby

Field	Description
Code	Code identifying the customer.
First Name	Customer's first name.
Last Name	Customer's last name.
Phone	Customer's preferred phone number.
Mobile	Customer's mobile phone number.
Fax	Customer's fax number.
Delivery Address	Customer's delivery address.

Field	Description
Post Code	Customer's post code.

#### **Details tab**

Customer Lay-by	
Customer: Willcocks, Chris	
Code: 5002	
Layby Number: 6 Total: \$67.96	
Location: Chadstone Paid: \$6.8	
Total To Pay: \$61.16	
Order Status: Pending	
Customer Details Items Payments	
Date: 27/07/2015	
Expiry Date: 7/09/2015 ~	
Layby Charge: \$0	
Instructions:	
Cancel Reason:	
Reference Print Update Details Delivered	Cancel Layby

Use this area to maintain the layby dates and instructions.

Field	Description			
Date	Date the layby was created.			
Expiry Date	Date the layby is due to expire.			
Layby Charge	Fee charged for creating the layby.			
Instructions	Additional instructions for the layby.			
Cancel Reason	Reason for cancelling the layby.			

#### Items tab

Use this area to view and edit the items ordered in the layby.

Customer Lay-	by							
Customer:	Willcock	s, Chris						
Code:	5002							
Layby Number:	6	*		Tota	al: \$67.96			
Location:	Chadst	one 🔍		Pai	d: \$6.8			
				Total To Pa	y: \$61.16			
	Order Status: Pending							
Customer Deta	ails Iter	ms Payments						
Item Code:			v					
		🔎 Find 🕇 Add	)					
Description :			-					
Unit Price:								
Description		Item	Price	Discount	Quantity	Line Total		
Annies Lane Chardonnay		9000	\$16.99	\$0	4	\$67.96 ^		
L						Q Update - Delete		
				Print Up	date Details Delive			
				e rint Op	Delive	cancer Layby		

Field	Description
Item Code	Search for an item to add to the layby. See <i>Finding an item with a search field</i> .
Description	Description of the selected item.
Unit Price	Unit price of the selected item.
Q Update	Save any changes made to the list of items in the layby.
- Delete	Delete the selected item from the layby.

### Layby item grid

Field	Description				
Description	Description of the item in the layby.				
Item	Unique code identifying the included item.				
Price	Price of the item charged in the layby.				
	Note: You can edit the price charged for this layby.				
Discount	Discount amount applied for this item.				
	Note: The discount is a flat amount, not a percentage.				
Quantity	Number of units of this item included in the layby.				
Line Total	Total price for all units of this item in the layby.				

### **Payments tab**

Use this area to track the payments that have been made for this layby.

Customer L	ay-by									
Customer:	wil	Willcocks, Chris								
Code:	500	5002								
Layby Numb	er: 6			*	Total: \$67.96					
Location:	Chadstone			w	Paid: \$6.8					
						Total To Pay:	\$61	.16		
						Order Status:	Per	ding		
Customer	Details	Items	Payments							
Payment Da	ate	Amoun	nt	Deposit	Site Transaction	Terminal		Journal	Clerk	
27/	07/2015	5	\$0	\$6.8	Chadstone		8	25	Susan	-
										÷
						Print Updat	e De	Delivered	Cancel Layt	bγ

Field	Description			
Payment Date	Date the payment was made.			
Amount	Amount paid.			
Deposit	Amount of deposit paid in this payment.			
Site Transaction	Site the transaction occurred at.			
Terminal	Code identifying the terminal that processed the transaction.			

Field	Description
Journal	Journal entry of the transaction where the payment occurred.
Clerk	Point of Sale operator who performed the transaction.

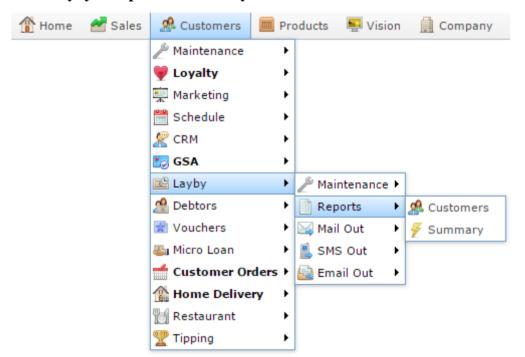
# **Customer Layby report**

Use the Customer Layby report to view existing laybys.

# **Opening the Customer Layby report**

To open the Customer Layby report:

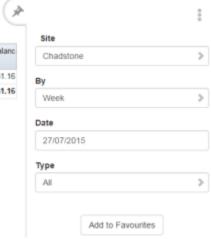
- 1. Press <sup>A</sup> Customers</sup> from the menu bar.
- 2. Press Layby > Reports > Summary.



The Customer Layby report is displayed.

	Expire: \$67.96 \$6.80 \$61.16 \$67.96 \$6.80 \$61.16
	\$67.96 \$6.80 \$61.16
Total: \$67.96 \$6.80 \$	

. . .



# **Customer Layby report key fields**

# **Filters area**

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

Field	Description		
Add to Favourites	Press to add this report to your Portal favourites for easier access.		
Site /	Select the site or sites to report on.		
Sites			

# **Report area**

This area displays report information.

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

Field	Description
Site /	The name of the relevant site.
Description	
Name /	Name of the debtor or customer.
Customer /	
Customer Name /	
Debtor	
Customer ID /	Unique code identifying the
Customer	customer.
Phone	Customer's phone number.
Layby #	Unique number identifying the layby.
Layby Date	Date the layby was created.
Expiry Date	Date the layby expires.
Delivery Date	Date the layby was delivered.

F	ield Description
Status	Status of the layby. For example, Expired, or Pending.
Total	Total value of the layby.
Paid	Amount of the layby total that has been paid.
Balance	Amount of the layby total yet to be paid.

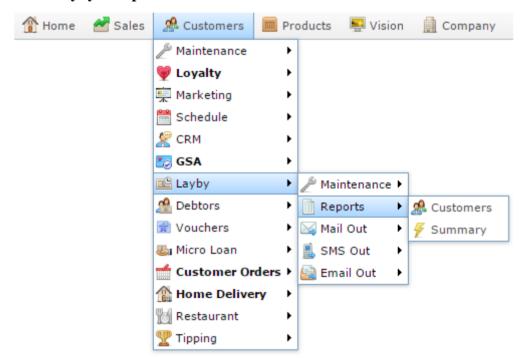
# Layby Customer Details report

Use the Layby Customer Details report to view the details of customers with laybys.

# **Opening the Layby Customer Details report**

To open the Layby Customer Details report:

- 1. Press <sup>Customers</sup> from the menu bar.
- 2. Press **Layby > Reports > Customers**.



The Layby Customer Details report is displayed.

Layb	y Cust	ome	rs Det	ails				0	4	÷
	·								Site	
Name	Site	Address	Suburb	State	Post Code	Phone	Mobile	Fax	Chadstone	>
Burberry,)	A Chadstone	91 Garden Ave	Gardenvill	VIC	3699	9998787		-	Add to Favourites	

# Layby Customer Details report key fields

# **Filters area**

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or year.
Date / Date From and Date To / As of /	Select the date or date period to report on.
Start Date and End Date	

Field	Description				
Туре	Select the type of layby to report on:				
	Pending	Laybys that are within their due date, and have not been paid in full or delivered.			
	Paid	Laybys that have been paid in full but not delivered.			
	Delivered	Laybys that have been marked as delivered.			
	Expired	Laybys that have exceeded their due date without being paid or delivered.			
	Cancelled	Laybys that have been cancelled.			
	All	All laybys.			

# **Report area**

This area displays report information.

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

Field	Description	
Site /	The name of the relevant site.	
Description		
Name /	Name of the debtor or customer.	
Customer /		
Customer Name /		
Debtor		
Customer ID /	Unique code identifying the	
Customer	customer.	
Phone	Customer's phone number.	

# 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 single supplier and item, and you can have multiple contracts for each supplier and each item.

# Controlled purchase order / Controlled requisition

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

# **Cost matrix / price matrix**

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

A price matrix can be:

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

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

# Credit adjustment

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

# **Credit limit**

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

# **Credit note**

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

# Creditor

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

# **Creditor 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 cannot record delivery fees or discounts. You can match delivery docket stock receipts to creditor invoices.

## Department

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

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

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

#### **Open transaction**

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

#### Operator

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

#### Pack

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

#### Pallet

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

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

#### **Payment terms**

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

# PDT

A PDT, or portable data terminal, is a small hand-held device with a touchscreen and an inbuilt 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 soft drink and crates of 24 cans, you can use a referral so that purchasing a single can (Selling item) depletes your stock of crates (Stock item) by 1/24th. This is different to using packs, as both individual cans and whole crates of items are tracked in your inventory.

# **Referred item**

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

# Requisition

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

### Roster

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

# Sale minimum

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

# Selling item

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

### Size

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

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

#### **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 soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the crate of 24 cans is the stock item.

#### Stock on hand

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

#### **Stock receipt**

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

#### **Stock return**

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

#### Stock take

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

### Style

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

# **Supplier**

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

# **Supplier promotion**

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

# 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
Total:	\$38.20
Credit Card CASH	\$20.00 \$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.