



Portal User Guide

Navigating and Using the Portal

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Navigating the Portal

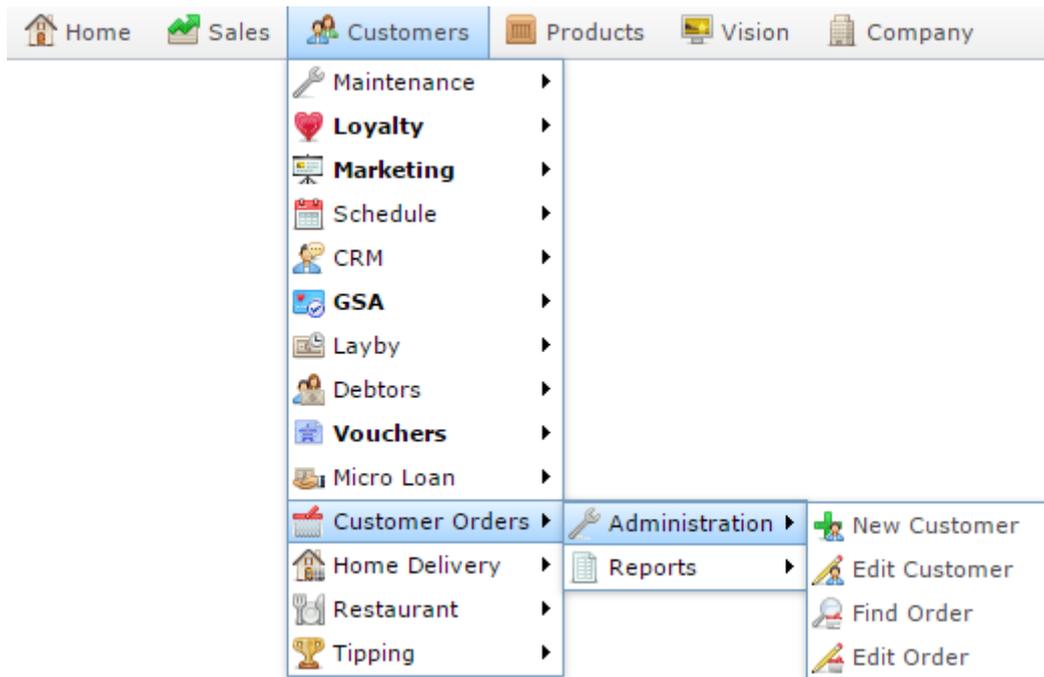
The Portal offers three easy ways to navigate around:

- The Menu
- The Site Map
- Favourite reports.

Tip: You can find user guides and more help in the Available Manuals report. See *Available Manuals report*.

The Menu

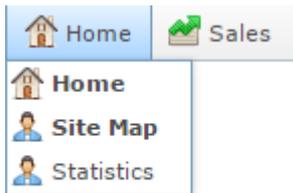
Use the Portal menu at the top of the screen to access different Portal systems. Press the button on the menu bar, and navigate through the sub-menus to find the function you want.



Sitemap

You can also use the Portal Site Map to find where a Portal feature is located. To open the sitemap:

1. Press  Home in the menu bar.



2. Press Site Map.

The Portal Site Map is displayed.

Portal Site Map : Powered by AMC

- Home
 - [Home](#)
 - [Site Map](#)
 - [Statistics](#)
- Sales
 - Ledger / Cash Book
 - Ledgers
 - [Ledger Balance](#)
 - [Ledger Report](#)
 - Cash Book
 - [Balances](#)
 - [Statements](#)

3. Scroll down through the Site Map to find the system you want.

Tip: You can also press **CTRL+F** on your keyboard to perform a text search of the screen. Type part of the name of the system you're looking for in the search box that comes up.

4. Press the link to open that Portal system.

The Portal screen or report is displayed.

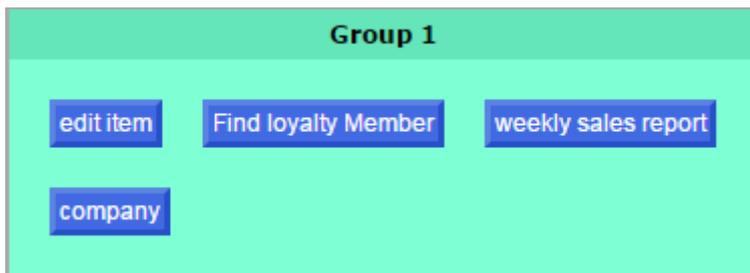
Favourite Reports

Your Favourite reports and Portal screens are displayed in groups on your home page. There are three group levels:

- Reports and screens that have been set as favourite for the whole Portal appear in the Global groups.



- Reports and screens that have been set as favourite for your company appear in the numbered groups.



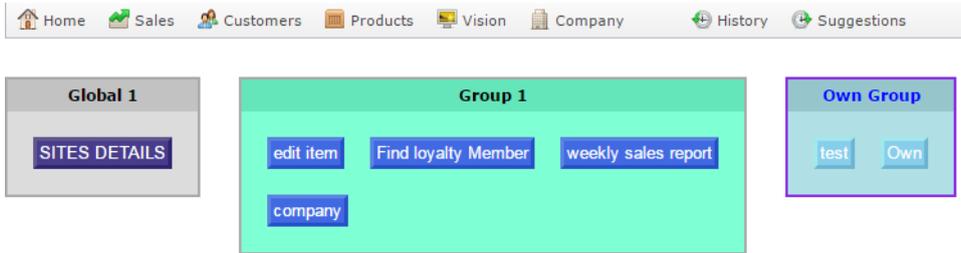
- Reports that you have set as favourite appear in the Own Group.



For more information on favourite links and groups, see *Managing favourite links* on page 6.

Managing favourite links

The Portal displays favourite links on the home screen of the Portal whenever you log in. These give you easy access to commonly-used reports or screens.



Favourite links are displayed in groups of buttons called favourite groups. Each favourite group has a title, and can use a different colour scheme to help identify what the links relate to.

Favourite groups

You can customise how the favourite groups appear, and what links are displayed on several levels:

Global favourite groups



Global favourite groups are displayed for every user on the same Portal. They can only be edited by someone with super administration privileges on that Portal, as any changes made affect everyone on the Portal.

Company favourite groups

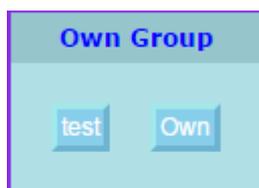


Company favourite groups are displayed for every user within a company on the Portal. They can only be edited by someone with administration privileges for that company, or a super administrator. Any changes made to a company favourite group affect every user in that company.

Use Company favourite groups to create quick access shortcuts to reports that many people in your company use, or to create quick access "areas" for different departments in your company.

Note: A user cannot use favourite links to access any report they do not have sufficient Portal permissions to access. Any links that are not permitted to see are hidden from view.

Own Group favourite groups



Own Group favourite groups are displayed only for the user who creates them. Any user who has permission to favourite reports can create and edit their own group, and their favourite links are not displayed on any other user's home screen.

User Own Group favourite groups for favourite links that you personally want easy access to.

See:

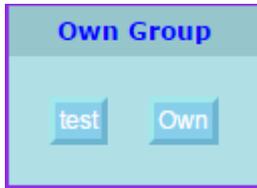
- *User Favourite Groups report* on page 26.
- *User Favourite Groups Maintenance screen* on page 22.
- *User Favourite report* on page 32.
- *User Favourite Maintenance screen* on page 29.

What you can do:

1. *Creating a new favourite group* on page 8.
2. *Editing a favourite group* on page 10.
3. *Deleting a favourite group* on page 12.
4. *Adding a new favourite link* on page 13.
5. *Editing a favourite link* on page 16.
6. *Opening a favourite link* on page 18.
7. *Deleting a favourite link* on page 20.

Creating a new favourite group

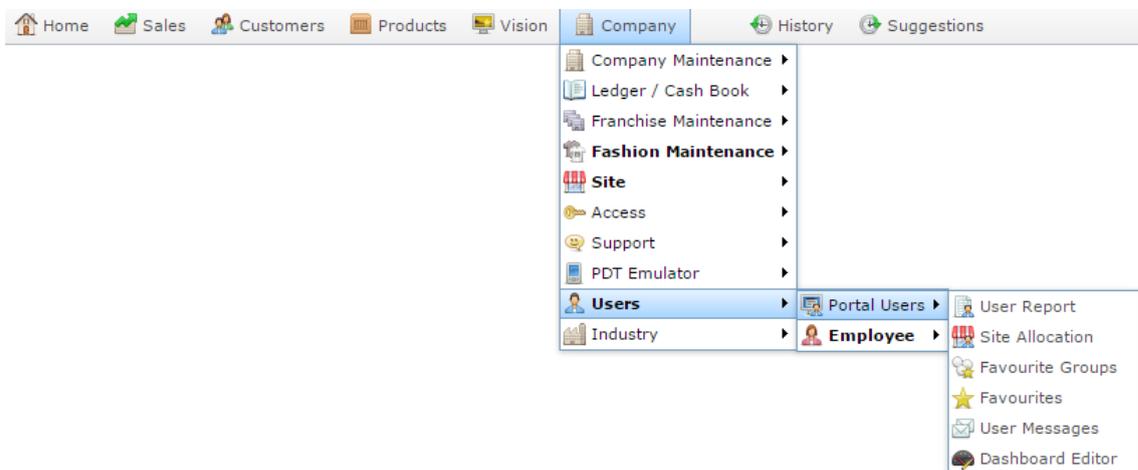
Create a new group to display a set of favourite links together on the home screen.



Note: You can only create groups at a Company or Global level if you have sufficient permissions.

To create a new favourite group:

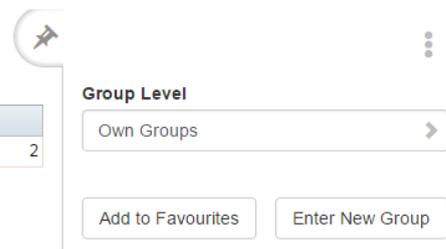
1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > Favourite Groups**.



The User Favourite Groups report is displayed

User Favourite Groups Report

Favourite	Description	Links
4	Own Group	2



3. Press .

The Favourite Group Maintenance screen is displayed.

See *User Favourite Groups Maintenance* screen on page 22.

4. Type a description for the group in the [Description](#) field.

Note: This is also used as the title of the group in the home screen.

5. Select the maximum number of buttons you want to appear in a single row in the group in the [Number of Horizontal URL or Button](#) field.
6. Adjust the appearance of the group as required.
7. Select the group level you want to create:
 - **Own Groups:** Create this group just for your own use.
 - **Company:** Create this group to appear for all users of this company.
 - **Global:** Create this group to appear for all users of this Portal.

Note: You cannot create **Company** or **Global** groups if you do not have sufficient permissions.

8. Press .

The group is created.

You can now add favourite links to the group to display them on the home screen. See *Adding a new favourite link* on page 13.

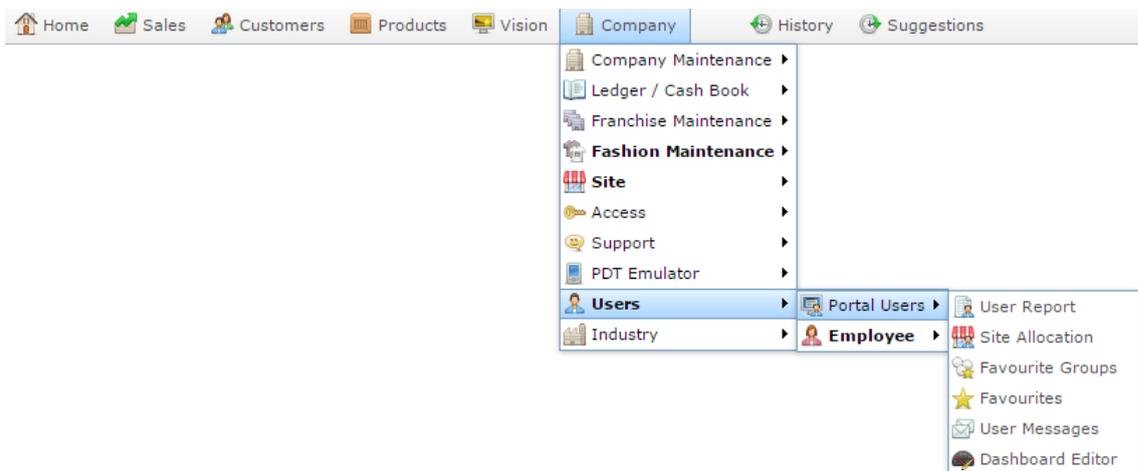
Editing a favourite group

Edit a favourite group to change its appearance on the home screen, or change what group level it is.

Note: You can only edit groups at a Company or Global level if you have sufficient permissions.

To edit a favourite group:

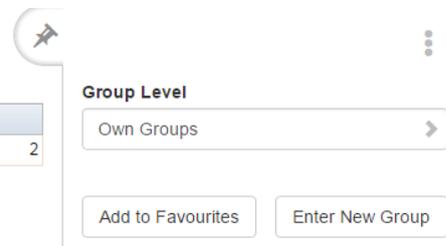
1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > Favourite Groups**.



The User Favourite Groups report is displayed

User Favourite Groups Report

Favourite	Description	Links
4	Own Group	2



1. Press the Favourite field of the group you want to edit.
The Favourite Group Maintenance screen is displayed.

Group 4 Record

Description:	<input type="text" value="Own Group"/>
Number of Horizontal URL or Button:	<input type="text" value="3"/>
Group Background Color:	<input type="text" value="Powder Blue"/>
Group Boundary Color:	<input type="text" value="Blue Violet"/>
Group Boundary Thickness:	<input type="text" value="2 px"/>
Group Title Color:	<input type="text" value="Blue"/>
Button Text Color:	<input type="text" value="White"/>
Button Background Color:	<input type="text" value="Sky Blue"/>
Group Level:	<input type="text" value="Own Groups"/>

Title

Button Link

Button Link

2. Make the required changes.

See *User Favourite Groups Maintenance* screen on page 22.

Note: You cannot edit a Company or Global group, or turn an Own Group group into a Company or Global group, if you do not have sufficient permissions.

3. Press .

The group is edited.

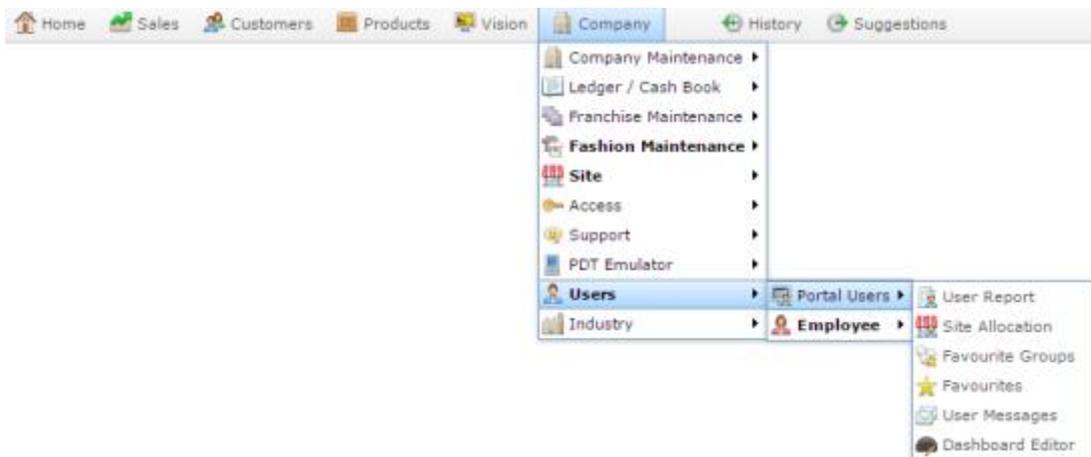
Deleting a favourite group

Delete a favourite group to remove it and its links from the home screen.

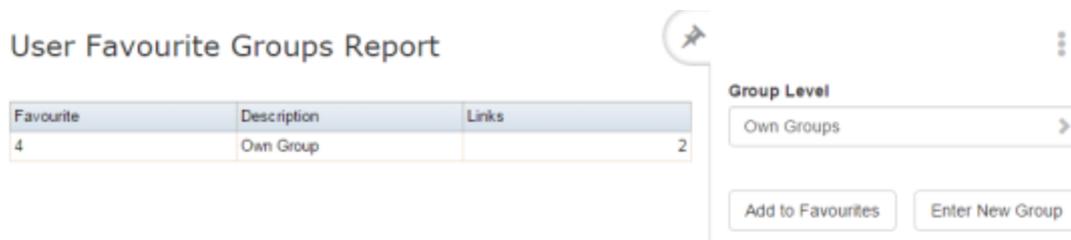
Note: You can only delete groups at a Company or Global level if you have sufficient permissions.

To delete a favourite group:

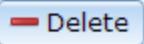
1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > Favourite Groups**.



The User Favourite Groups report is displayed



1. Press the Favourite field of the group you want to delete.
The Favourite Group Maintenance screen is displayed.

2. Press .

The group is deleted.

Adding a new favourite link

You can add Portal reports to a favourite group directly from the report itself using the

 button.

If you need to add a screen that does not display a button, you can directly edit an existing favourite to point it to the new URL.

Add favourite links using the Add To Favourites button

To add a favourite using the Add To Favourites button:

1. Navigate to the report you want to add.

2. Press .

The report is added to your Own Group group of favourites.

3. If necessary, edit the favourite to move it to the group you want.

See *Editing a favourite link* on page 16.

Add favourite links for other URLs

To add a favourite link for other URLs, you create a new favourite and edit the favourite to point to your URL:

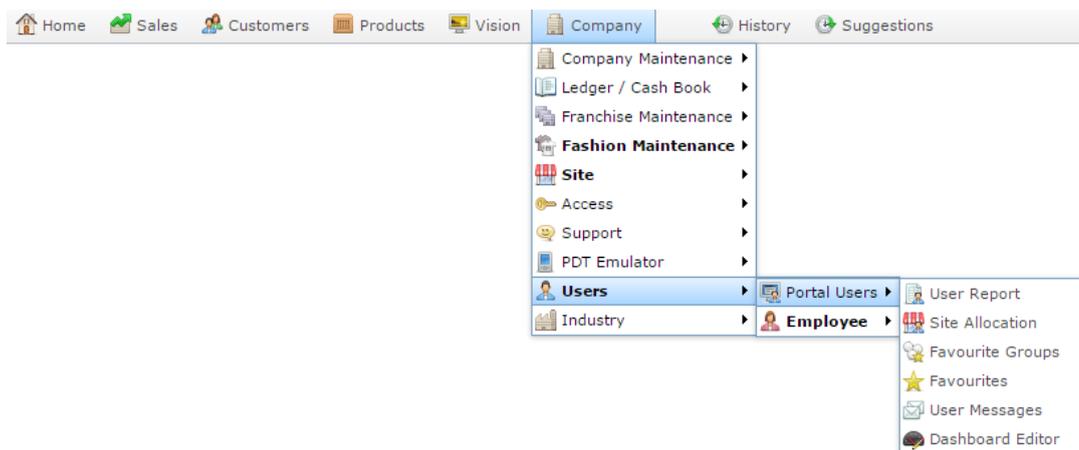
1. Find the URL of the screen you want to add and copy it somewhere you can easily get it.

Tip: Find the URL of a Portal screen on the Site Map page. Right-click the link of the screen you want to favourite and select Copy Link. See *Navigating the Portal* on page 3.

2. Navigate to any report and press .

Note: You can use any report, as you're going to change the URL and name in the next step.

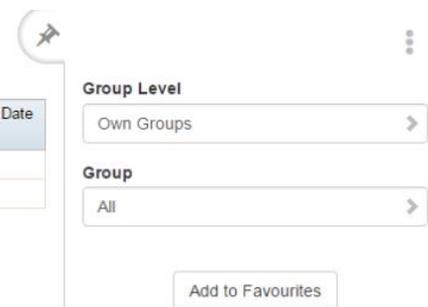
3. Open the Favourite Maintenance screen:
 1. Press  **Company** in the main menu bar.
 2. Press **Users > Portal Users > Favourites**.



The User Favourite report is displayed

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
157	test	Own Group	19/05/2015	✓



3. Press the **Favourite** field of the favourite link you want to edit.

A popup menu is displayed.

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
15		Own Group	19/05/2015	✓

Group Level: Own Groups

Group: All

Add to Favourites

4. Press **Edit Favourite**.

The User Favourite Maintenance screen is displayed.

User Bob URL Favourite Record

Group: Own Group

Description: Own

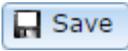
URL: /QA/UserFavouritesReport.php?id=101&chain=-1&groupLevel=g&group=-1&groupid=1&user=g&delete=Yes

Use Current Date: True

Save Delete Cancel

4. Paste or type the URL you copied earlier into the **URL** field.
5. Type an appropriate name for the link in the **Description** field.
6. Edit any other fields as required.

See *User Favourite Maintenance screen* on page 29.

7. Press  **Save**.

The favourite link is created.

Editing a favourite link

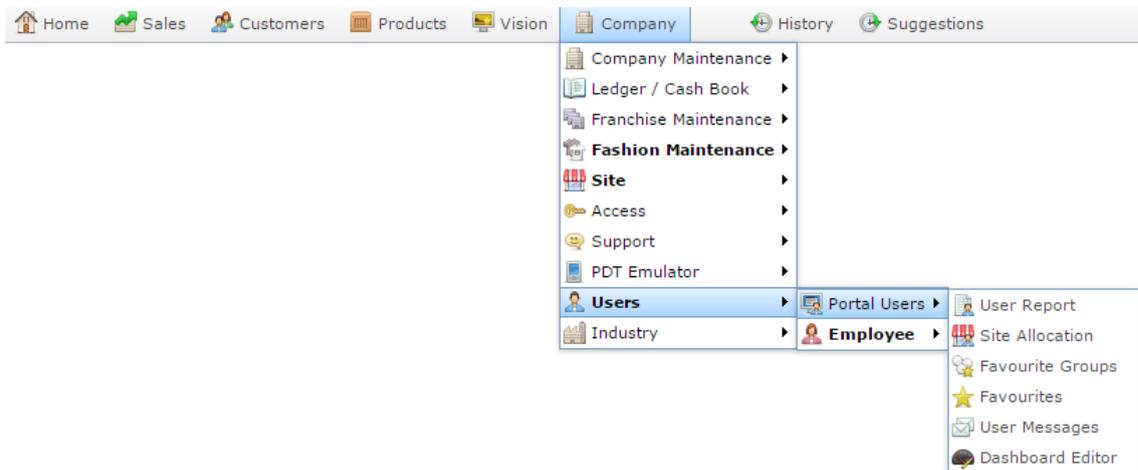
Edit a favourite link to:

- Move it to another group.
- Change the title that appears on the button.
- Change the URL it links to.
- Change whether or not it uses the current time.

Note: You need sufficient permissions to move a link to or from a Company or Global group.

To edit a favourite link:

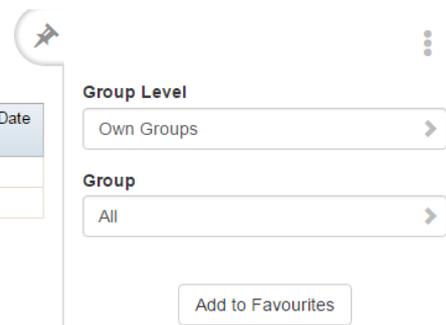
1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > Favourites** .



The User Favourite report is displayed

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
157	test	Own Group	19/05/2015	✓



3. Press the **Favourite** field of the favourite link you want to edit.
A popup menu is displayed.

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
14		Own Group	19/05/2015	✓

Run Favourite
Edit Favourite
Delete Favourite

Group Level

Own Groups

Group

All

Add to Favourites

4. Press **Edit Favourite**.

The User Favourite Maintenance screen is displayed.

User Bob URL Favourite Record

Group:

Description:

URL:

Use Current Date:

5. Make the required changes.

See *User Favourite Maintenance screen* on page 29.

6. Press .

The changes are saved.

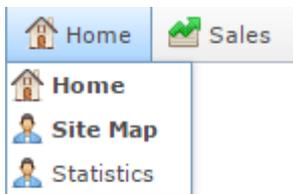
Opening a favourite link

Open a favourite link to view the report or screen you have favoured. You can open a favourite link from the home screen, or the User Favourites report.

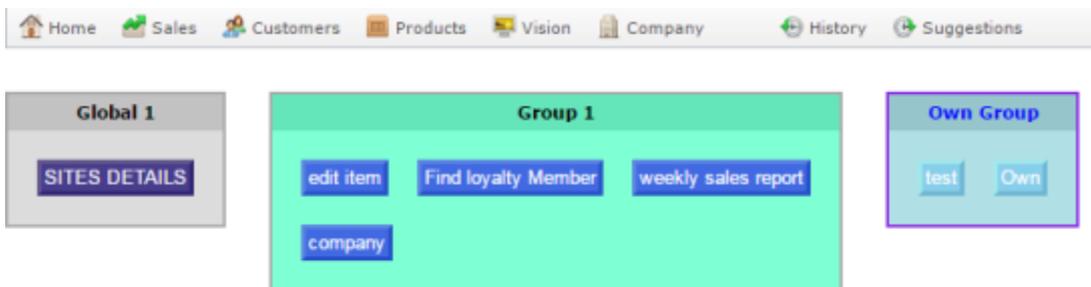
Opening a favourite link from the home screen

To open a favourite link from the home screen:

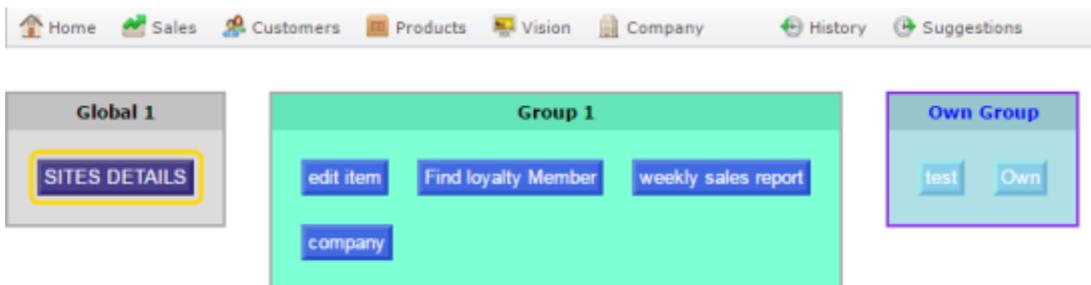
1. Press  Home in the main menu.
2. Press Home.



The home screen is displayed.



3. Press the button of the favourite link you want to open.

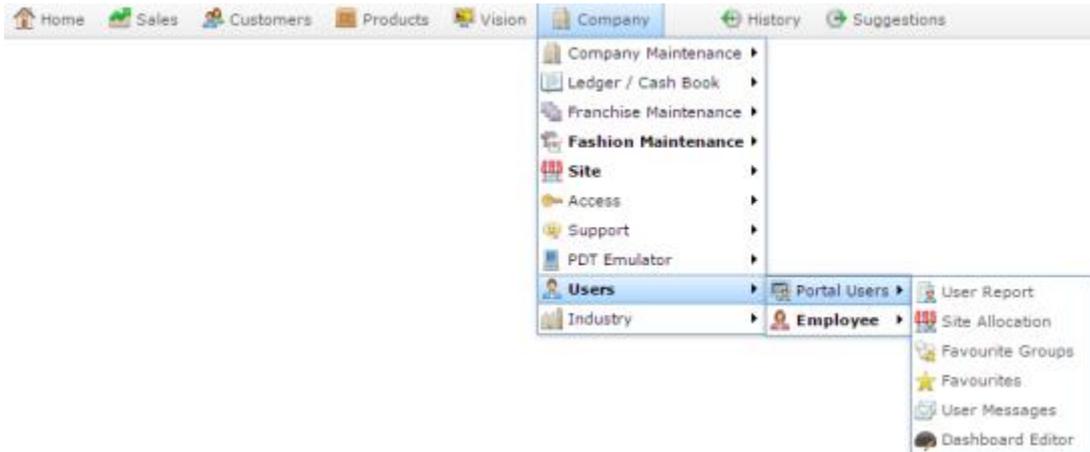


The favourite link is opened.

Opening a favourite link from the User Favourites report

To open a favourite link from the User Favourites report:

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



The User Favourite report is displayed

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
157	test	Own Group	19/05/2015	✓

Group Level: Own Groups >

Group: All >

Add to Favourites

3. Press the **Favourite** field of the favourite link you want to edit.
A popup menu is displayed.

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
157	test	Own Group	19/05/2015	✓

Group Level: Own Groups >

Group: All >

Add to Favourites

Run Favourite
Edit Favourite
Delete Favourite

4. Press **Run Favourite**.
The favourite link is opened.

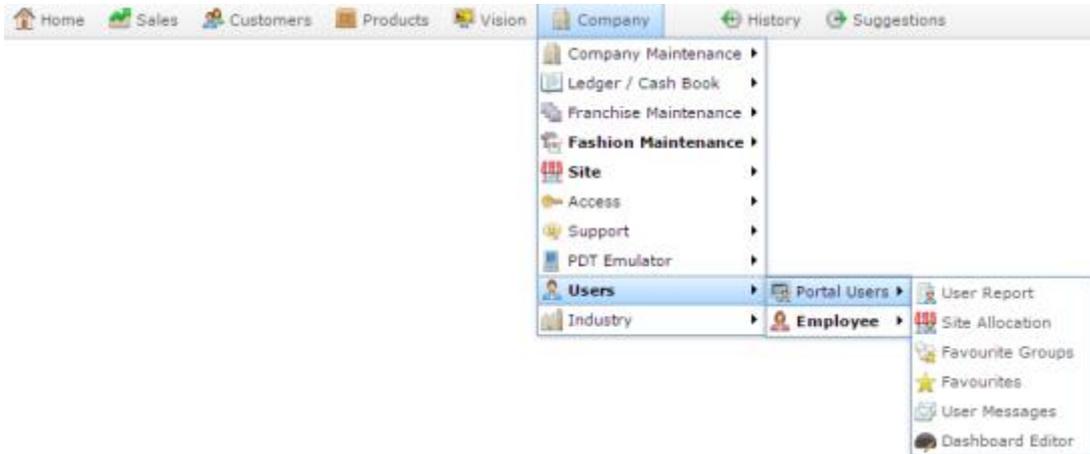
Deleting a favourite link

Delete a favourite link to remove it from the home screen.

Note: You need sufficient permissions to delete a link from a Company or Global group.

To delete a favourite link:

1. Press  Company in the main menu bar.
2. Press Users > Portal Users > Favourites .



The User Favourite report is displayed

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
157	test	Own Group	19/05/2015	✓

Group Level

Own Groups >

Group

All >

Add to Favourites

3. Press the Favourite field of the favourite link you want to edit.

A popup menu is displayed.

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
157	test	Own Group	19/05/2015	✓

Run Favourite
Edit Favourite
Delete Favourite

Group Level

Own Groups >

Group

All >

Add to Favourites

4. Press **Delete Favourite**.

The favourite link is deleted.

User Favourite Groups Maintenance screen

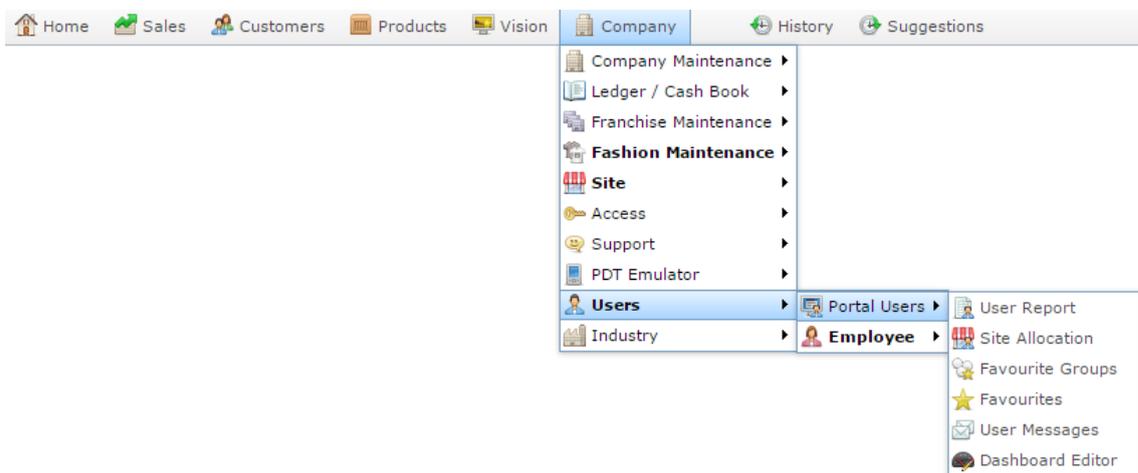
Use this screen to control how favourite items in this group are displayed on the home screen.

See *Creating a new favourite group* on page 8.

Opening the User Favourite Groups Maintenance screen

To open the User Favourite Groups Maintenance screen:

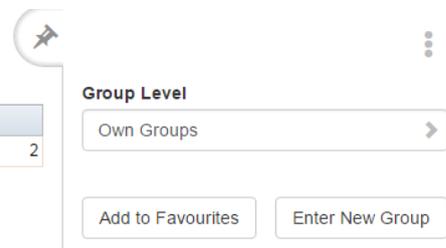
1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > Favourite Groups**.



The User Favourite Groups report is displayed

User Favourite Groups Report

Favourite	Description	Links
4	Own Group	2



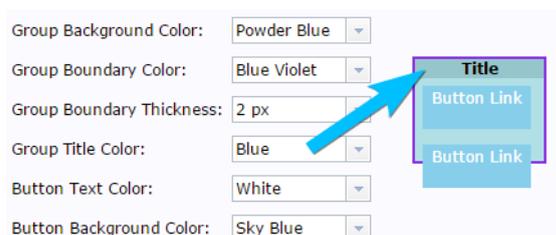
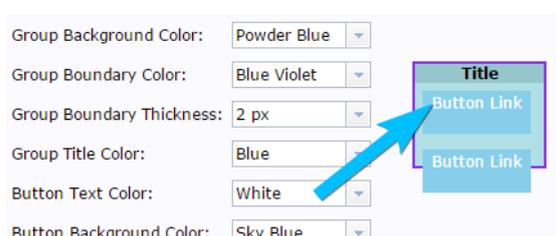
The interface shows a table with columns for Favourite, Description, and Links. Below the table, there is a 'Group Level' dropdown menu set to 'Own Groups'. There are two buttons: 'Add to Favourites' and 'Enter New Group'.

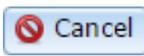
3. Press the **Favourite** field of the group you want to edit.

The User Favourite Groups Maintenance screen is displayed.

User Favourite Groups Maintenance screen key fields and buttons

Field	Description
Description	Description of the group. This is also used as the group title on the home screen.
Number of Horizontal URL or Button	<p>Number of URL links or buttons that are displayed in a row, before a new row is formed.</p> <p>For example, if this is set to 4, and there are six links in the group, the first four links are displayed in a single row. The last two links are displayed in a new row underneath.</p>
Group Background Color	<p>Select the background colour of the group.</p>

Field	Description
<p>Group Boundary Color</p>	<p>Select the colour of the border of the group.</p> 
<p>Group Boundary Thickness</p>	<p>Select the width of the border.</p> 
<p>Group Title Colour</p>	<p>Select the colour of the title background of the group.</p> 
<p>Button Text Colour</p>	<p>Select the colour of the text to display on the buttons.</p> 

Field	Description
Button Background Colour	<p>Select the colour of the buttons in the group.</p> 
Group Level	<p>Select the level of this group:</p> <ul style="list-style-type: none"> ▪ Own Group: This group is for the individual user who created it. ▪ Company: This group appears for all users of this company. ▪ Global: This group appears for all users of this Portal.
 Save	<p>Press to save your changes.</p>
 Delete	<p>Press to delete this group.</p> <div style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 10px; margin-top: 10px;"> <p>Note: All favourite links for this group are also deleted. You must have sufficient permissions to delete Company or Global groups.</p> </div>
 Cancel	<p>Press to close this maintenance screen and return to the report.</p>

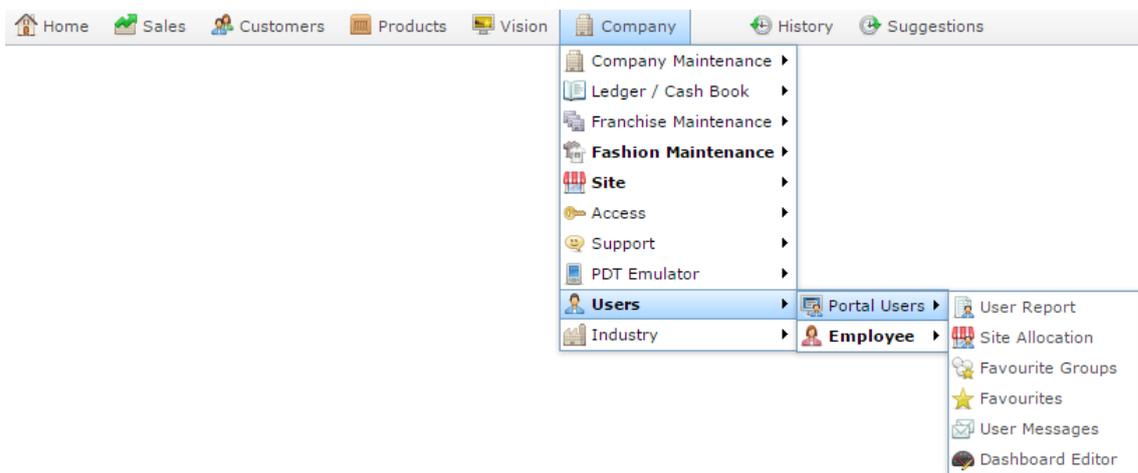
User Favourite Groups report

Use the User Favourite Groups report to view and maintain the groups used to display favourite portal links. For example, a group used to display the favourite site maintenance reports, or the favourite sales reports.

Opening the User Favourite Groups report

To open the User Favourite Groups report:

1. Press  **Company** in the main menu bar.
2. Press **Users > Portal Users > Favourite Groups**.



The User Favourite Groups report is displayed

User Favourite Groups Report

Favourite	Description	Links
4	Own Group	2

Group Level

Own Groups

Add to Favourites Enter New Group

User Favourite Groups report key fields

Filters area

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

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
<input type="button" value="Enter New Group"/>	Press to create a new favourite group.
Group Level	Press to filter the report to a specific group level.

Report area

This area displays the report information.

Field	Description
Favourite	Unique code identifying the group. Press this to open the maintenance screen for this group. See <i>User Favourite Groups Maintenance screen</i> on page 22.
Description	Description of the group.
Links	Number of favourite links the group contains.

User Favourite Maintenance screen

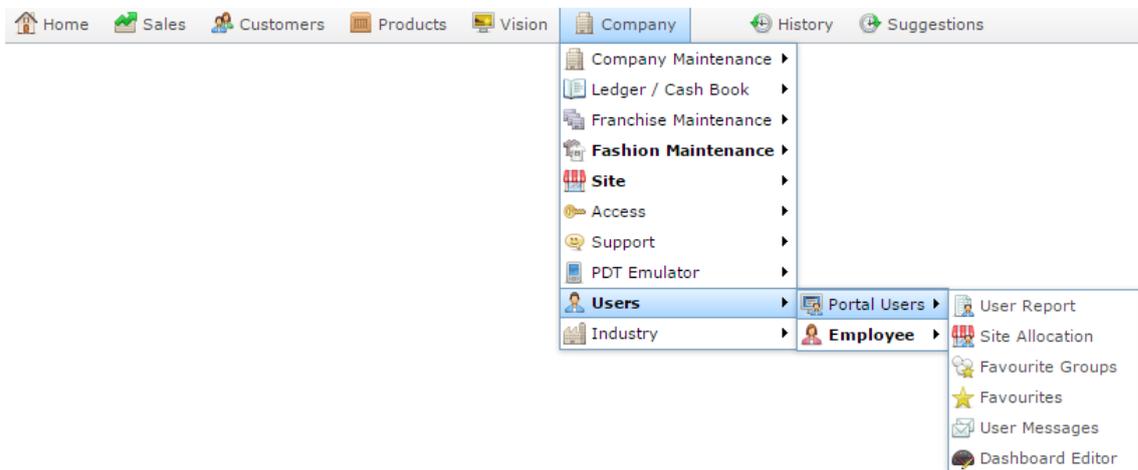
Use this screen to add or edit a favourite link within a group.

See *Adding a new favourite link* on page 13.

Opening the User Favourite Maintenance screen

To open the User Favourite Maintenance screen:

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



The User Favourite report is displayed

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
157	test	Own Group	19/05/2015	✓

Group Level
Own Groups >

Group
All >

Add to Favourites

3. Press the **Favourite** field of the favourite link you want to edit.
A popup menu is displayed.

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
100	Own	Own Group	4/03/2011	✓
15		Own Group	19/05/2015	✓

Run Favourite
 Edit Favourite
 Delete Favourite

Group Level
Own Groups

Group
All

Add to Favourites

4. Press **Edit Favourite**.

The User Favourite Maintenance screen is displayed.

User Bob URL Favourite Record

Group:

Description:

URL:

Use Current Date:

User Favourite Maintenance screen key fields and buttons

Field	Description
Group	Select the group this link should be displayed in. <div style="border: 1px solid blue; background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <p>Note: You need sufficient permissions to add a link to a Company or Global group.</p> </div>
Description	Description of the link displayed on the home screen.
URL	The URL to link to the favourite report or other URL.
Use Current Time	Select: <ul style="list-style-type: none"> ▪ True to apply the current time to the Portal loaded by this link. ▪ False to apply the date the favourite link was created to the Portal report loaded by this link.

Field	Description
 Save	Press to save your changes.
 Delete	Press to delete this favourite link.
 Cancel	Press to close this maintenance screen and return to the report.

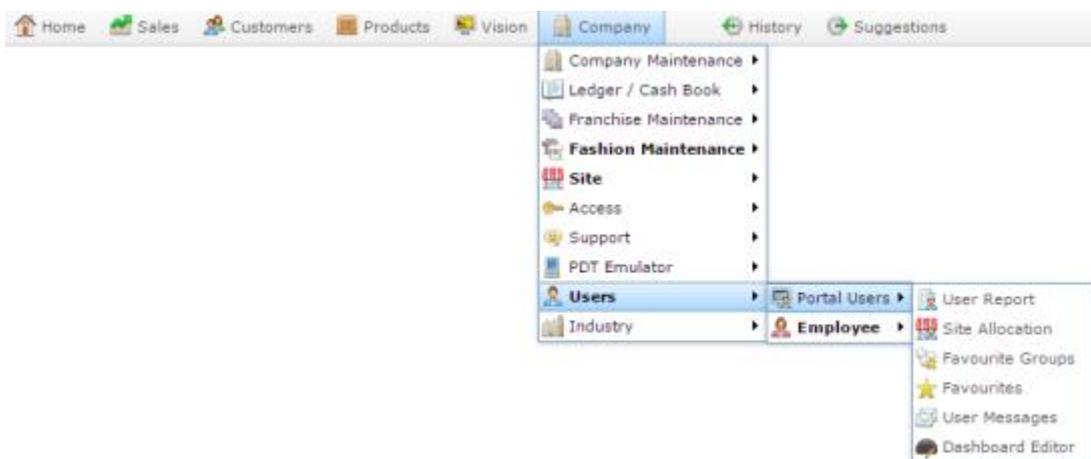
User Favourite report

Use the User Favourite report to view and maintain the favourite links that are displayed on the home screen.

Opening the User Favourite report

To open the User Favourite report:

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



The User Favourite report is displayed

User Favourites Report

Favourite	Description Click to Run	Group	Creation Date	Use Current Date
<u>100</u>	Own	Own Group	4/03/2011	✓
<u>157</u>	test	Own Group	19/05/2015	✓

Group Level
Own Groups >

Group
All >

Add to Favourites

User Favourite report key fields

Filters area

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

Field	Description
	Press to add this report to your Portal favourites for easier access.
Group Level	Press to filter the report to a specific group level.
Group	Press to filter the report to a specific favourite group.

Report area

This area displays the report information.

Field	Description
Favourite	Unique code identifying the favourite link. Press this to open the maintenance screen for this favourite link.
Description	Description of the favourite link.
Click to Run	Press to go straight to the favourite link URL.
Group	Name of the group this favourite link belongs to.
Creation Date	Date this favourite link was created.
Use Current Date	Whether this favourite link is configured to use the current date when loading the favourite report.

Managing user messages

You can send messages to other people through the Portal messaging system. Messages can be sent to:

- Other Portal and Point of Sale users within your company.
- Email addresses in your email phone book.
- AMC Convergent IT support.

Note: Messages cannot be deleted.

See:

- *User Message Report* on page 51.
- *User Messages Maintenance screen* on page 48.

What you can do:

1. *Creating a message to send to a Portal user* on page 38
2. *Creating a message to send to a Point of Sale user* on page 40.
3. *Creating a message to send to an email address* on page 36.
4. *Creating a message to send to AMC Convergent IT support* on page 42.
5. *Editing a message* on page 46.
6. *Viewing a message* on page 44.

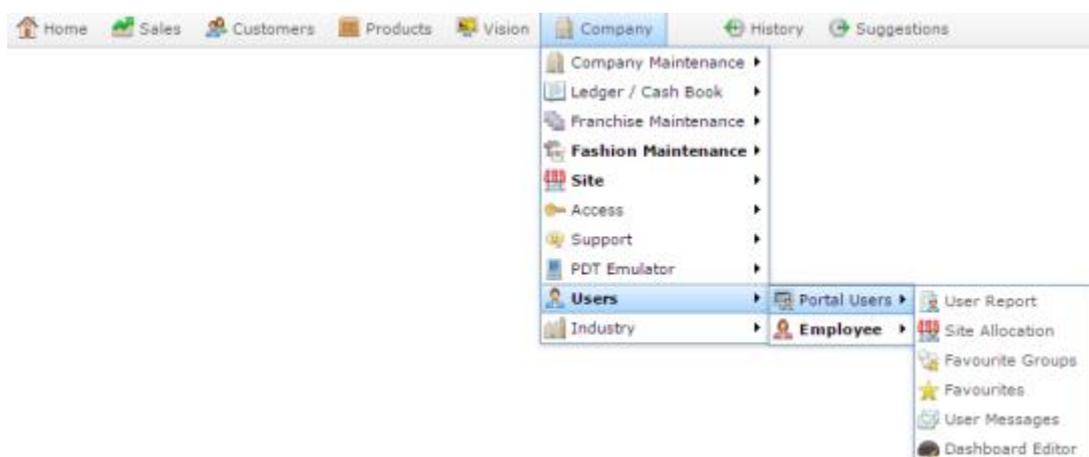
Creating a message to send to an email address

Create a message for an email address to send a message from within the Portal.

Tip: To configure email addresses in the phone book, see **View Phone Book** in the **Company Maintenance** menu.

To create a message to send to an email address:

1. Press  **Company** from the menu bar.
2. Press **Users > Portal Users > User Messages**.



The User Messages report is displayed.

User Message Report : All Messages

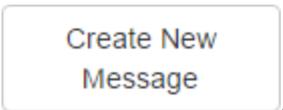
Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
Test	6/08/2010	Employee						
Test_1	27/02/2011	Employee		27/02/2011	AMC	Tara --> AMC		
Test message	6/08/2010	Employee		6/08/2010	Toms Demonsta	POS 1 -> Toms Demonsta	24/08/2011	✓

Type: All Messages

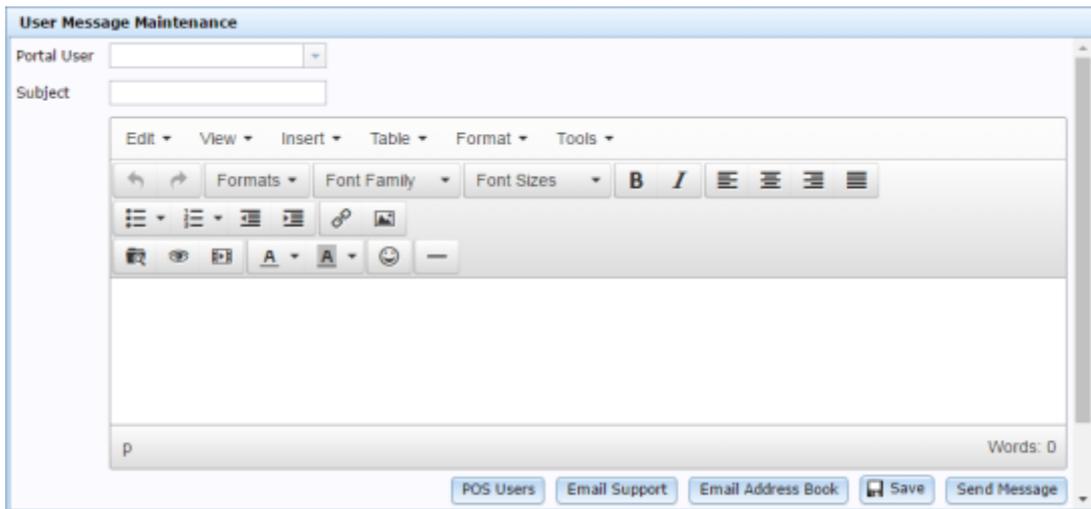
Date From: 2/02/2010

Date: 24/11/2016

Add to Favourites Create New Message

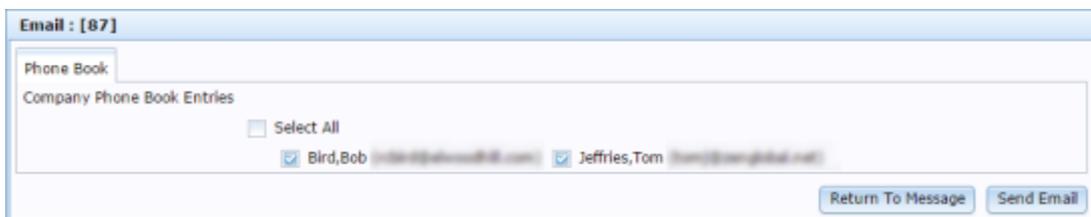
3. Press .

The User Message Maintenance screen is displayed.



4. Type a subject line to indicate what the message is about in the **Subject** field.
5. Type your message in the message body.
6. Press **Email Address Book**.

The Email Phone Book screen is displayed.



7. Select the addresses you want to send the message to.
8. You can either:
 - Press **Send Email** to send the message immediately.
 - Press **Return To Message** to return to the User Message Maintenance screen.

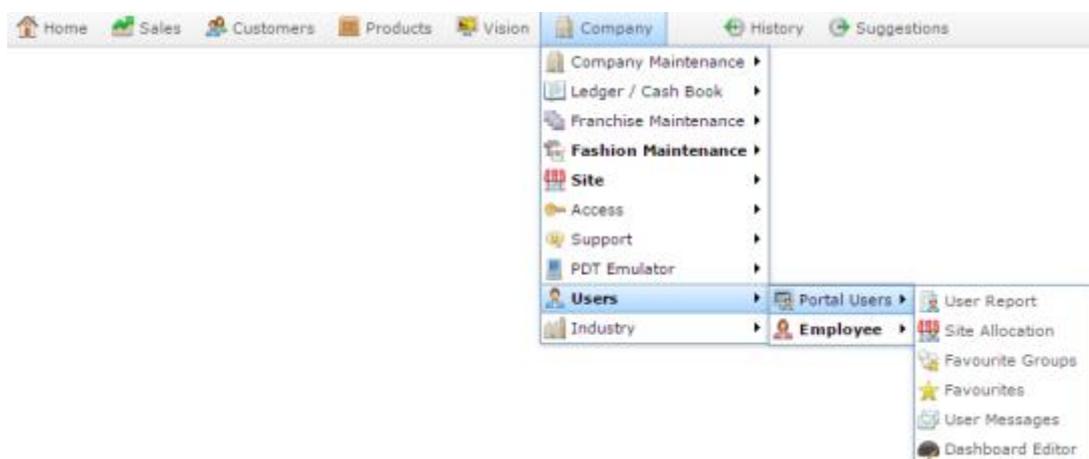
Tip: You can save this message to send it for later on the User Message Maintenance screen.

Creating a message to send to a Portal user

Create a message for a Portal user to send them information through the Portal. You can track when the message is read in the User Message report to ensure they have received it.

To create a message to send to a Portal user:

1. Press  **Company** from the menu bar.
2. Press **Users > Portal Users > User Messages**.



The User Messages report is displayed.

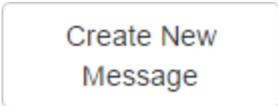
User Message Report : All Messages

Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
<u>Test</u>	6/08/2010	Employee						
<u>Test_1</u>	27/02/2011	Employee		27/02/2011	AMC	Tara --> AMC		
<u>Test message</u>	6/08/2010	Employee		6/08/2010	Toms Demonsta	POS 1 --> Toms Demonsta	24/08/2011	✓

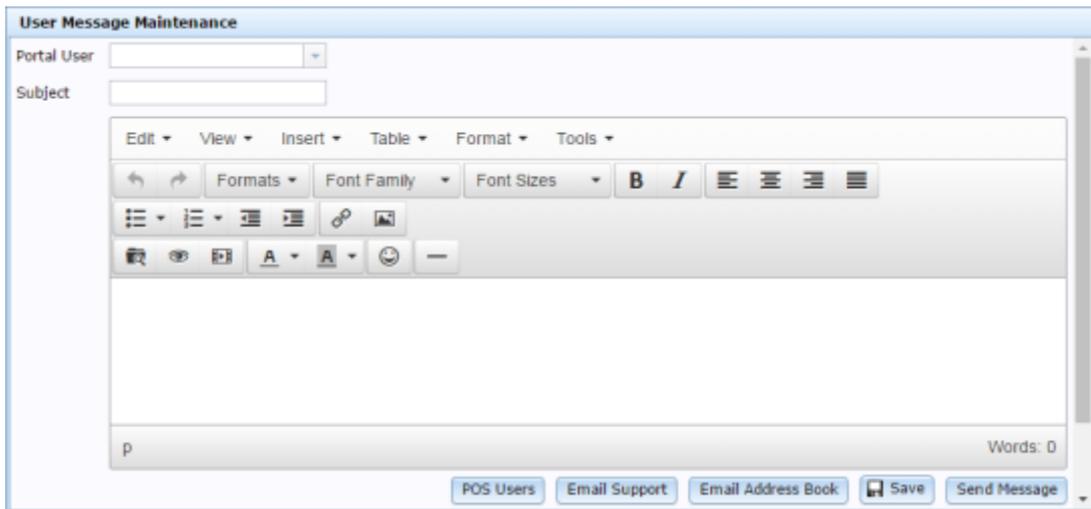
Type

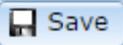
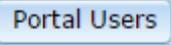
Date From

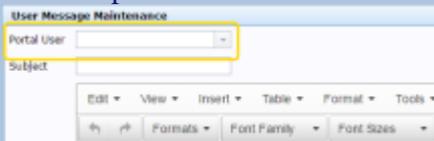
Date

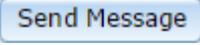
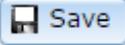
3. Press .

The User Message Maintenance screen is displayed.



Note: If the **Portal User** is not displayed, press  **Save** to save your changes and then press .



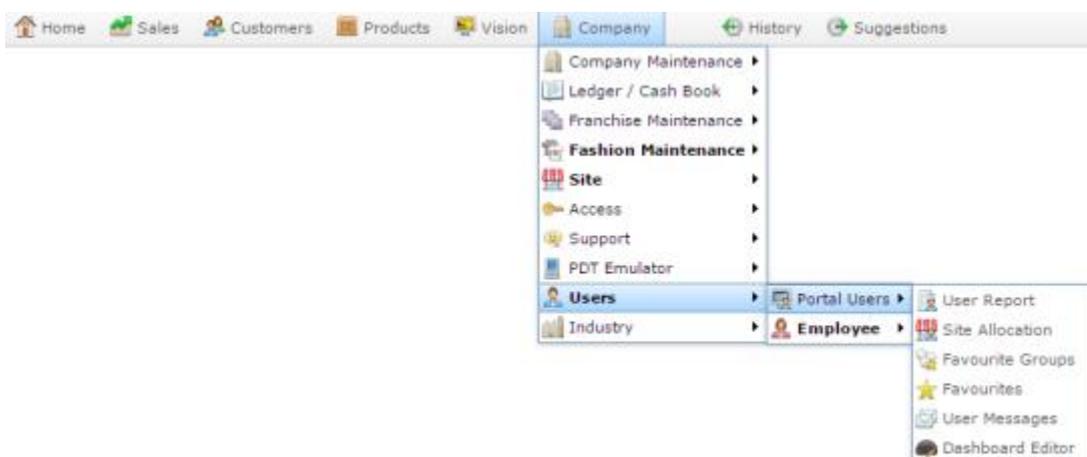
4. Select the person you want to send the message to in the **Portal User** field.
5. Type a subject line to indicate what the message is about in the **Subject** field.
6. Type your message in the message body.
7. You can either:
 - Press  **Send Message** to send the message immediately.
 - Press  **Save** to save the message for later without sending.

Creating a message to send to a Point of Sale user

Create a message for a Point of Sale user to send them information through the Point of Sale. The message is displayed in the iZen or POSPortal system at the site you select. You can track when the message is read in the User Message report to ensure they have received it.

To create a message to send to a Point of Sale user:

1. Press  **Company** from the menu bar.
2. Press **Users > Portal Users > User Messages**.



The User Messages report is displayed.

User Message Report : All Messages

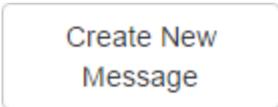
Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
Test	6/08/2010	Employee						
Test_1	27/02/2011	Employee		27/02/2011	AMC	Tara -> AMC		
Test message	6/08/2010	Employee		6/08/2010	Toms Demonsta	POS 1 -> Toms Demonsta	24/08/2011	✓

Type
All Messages >

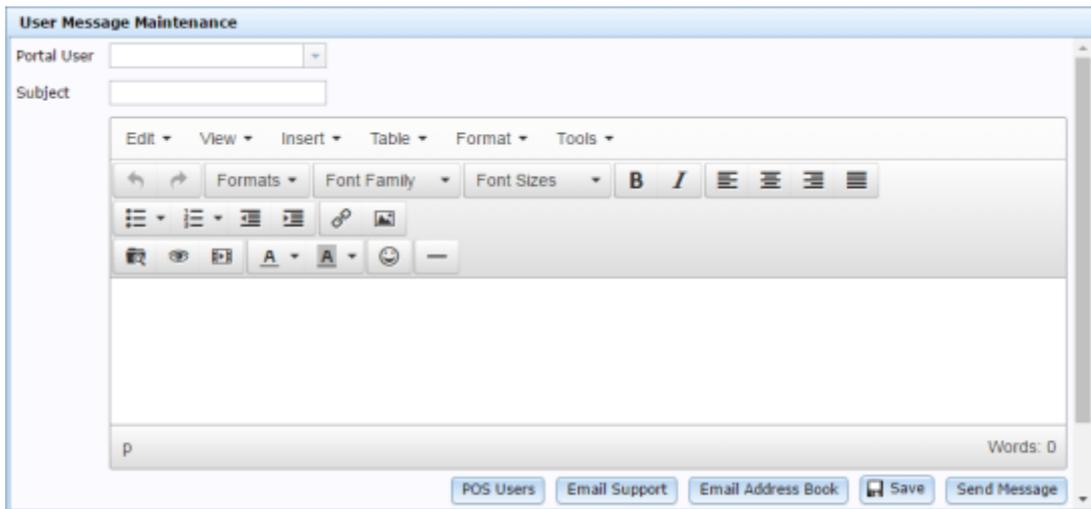
Date From
2/02/2010

Date
24/11/2016

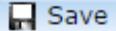
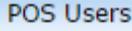
Add to Favourites Create New Message

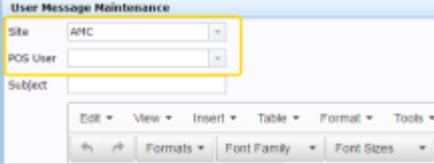
3. Press .

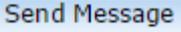
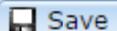
The User Message Maintenance screen is displayed.



4. Press .

Important Note: If the **POS User** is not displayed, press  to save your changes and then press .



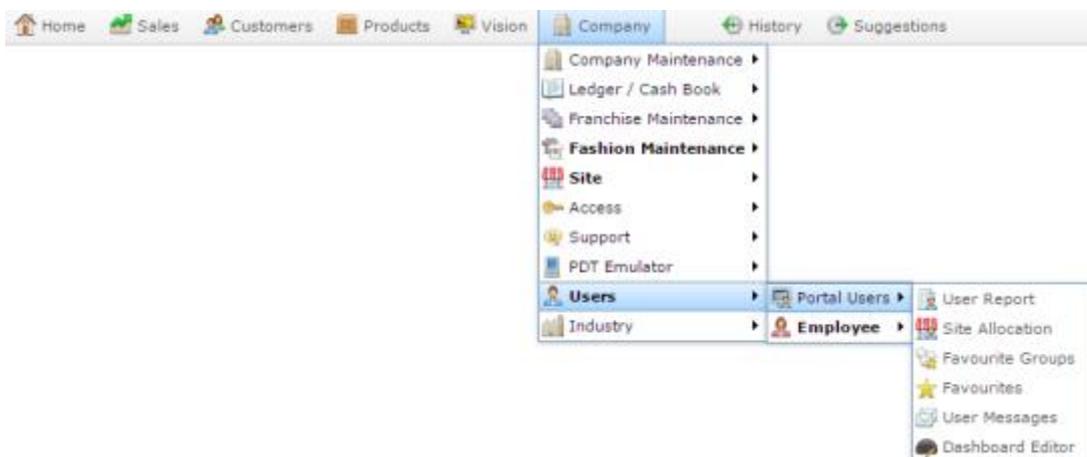
5. Select the site where the message should be displayed in the **Site** field.
6. Select the person you want to send the message to in the **POS User** field.
7. Type a subject line to indicate what the message is about in the **Subject** field.
8. Type your message in the message body.
9. You can either:
 - Press  to send the message immediately.
 - Press  to save the message for later without sending.

Creating a message to send to AMC Convergent IT support

Create a message to send to AMC Convergent IT support when you need help with the Portal.

To create a message to send to AMC Convergent IT support:

1. Press  **Company** from the menu bar.
2. Press **Users > Portal Users > User Messages**.



The User Messages report is displayed.

User Message Report : All Messages

Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
Test	6/08/2010	Employee						
Test_1	27/02/2011	Employee		27/02/2011	AMC	Tara -> AMC		
Test message	6/08/2010	Employee		6/08/2010	Toms Demonsta	POS 1 -> Toms Demonsta	24/08/2011	✓

Type
All Messages >

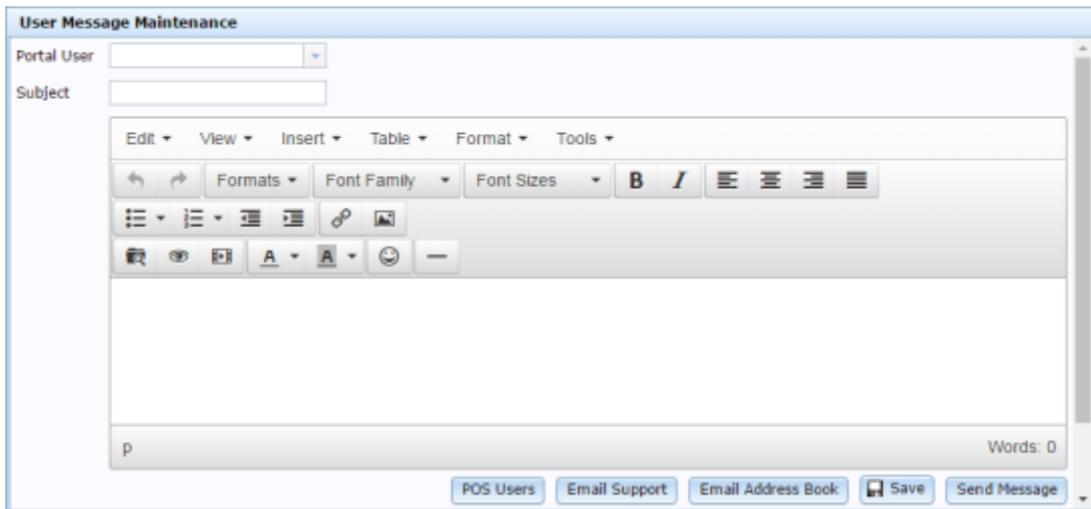
Date From
2/02/2010

Date
24/11/2016

Add to Favourites Create New Message

3. Press .

The User Message Maintenance screen is displayed.



4. Type a subject line to indicate what you need help with in the **Subject** field.
5. Type your message in the message body.

Tip: Try to be specific and include as many details as possible - this helps AMC Convergent IT staff answer your query quickly.

6. You can either:
 - Press **Email Support** to send the message immediately.
 - Press **Save** to save the message for later without sending.

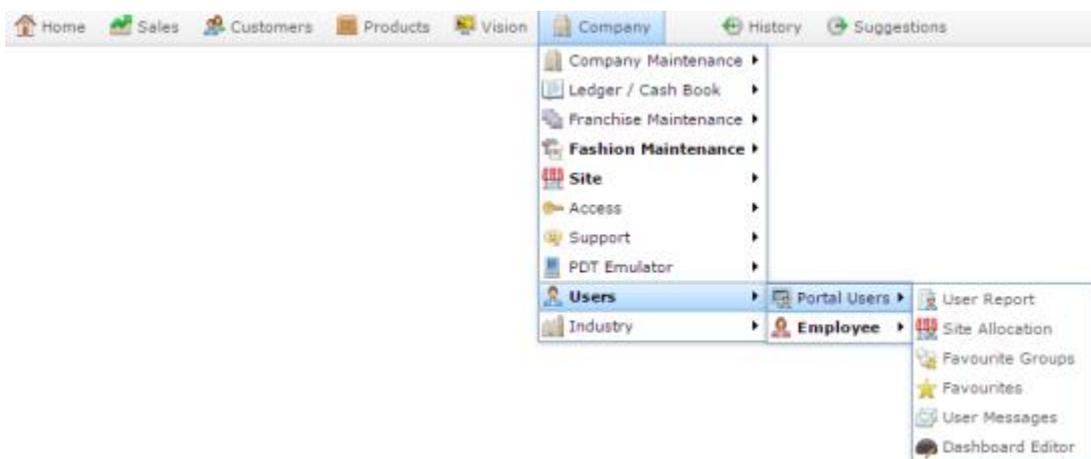
Viewing a message

View a message to see how it will appear to its recipients.

Tip: You can search for text within the message using .

To view a message:

1. Press from the menu bar.
2. Press Users > Portal Users > User Messages.



The User Messages report is displayed.

User Message Report : All Messages

Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
Test	6/08/2010	Employee						
Test 1	27/02/2011	Employee		27/02/2011	AMC	Tara -> AMC		
Test message	6/08/2010	Employee		6/08/2010	Toms	POS 1 - Demonsta > Toms	24/08/2011	✓

On the right side of the report, there are filters and actions:

- Type:** All Messages
- Date From:** 2/02/2010
- Date:** 24/11/2016
- Buttons:** Add to Favourites, Create New Message

3. Press the Subject of the message you want to view.

A popup menu is displayed.

User Message Report : All Messages

Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
Staff	24/11/2016	Portal	Bird, Bob					
Announcement		User	[Bob]					

[View Message](#)
[Edit Message](#)

Type

All Messages >

Date From

17/11/2016

Date

24/11/2016

Add to Favourites

Create New Message

4. Press [View Message](#).

The message is displayed.

Message From Bird, Bob [Bob] : Staff Announcement [87]

Search:

All Staff,

Please be aware due to the busy holiday season we will no longer be allowing customers to eat their lunch in the foyer. Please direct them to the nearby cafe.

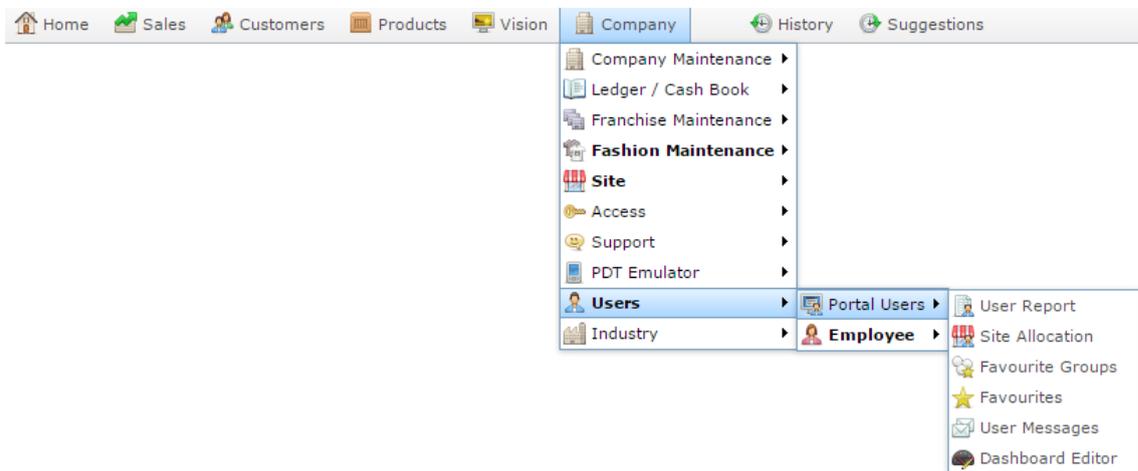
Editing a message

Edit a message to change the recipients, subject line, email body, or forward it to a new recipient.

Note: A message cannot be edited after it has been sent.

To edit a message:

1. Press  **Company** from the menu bar.
2. Press **Users > Portal Users > User Messages**.



The User Messages report is displayed.

User Message Report : All Messages

Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
Test	6/08/2010	Employee						
Test_1	27/02/2011	Employee		27/02/2011	AMC	Tara --> AMC		
Test messae	6/08/2010	Employee		6/08/2010	Toms Demonsta	POS 1 --> Toms Demonsta	24/08/2011	✓

📌
⋮

Type

All Messages ➤

Date From

2/02/2010

Date

24/11/2016

Add to Favourites
Create New Message

3. Press the Subject of the message you want to edit.
A popup menu is displayed.

User Message Report : All Messages

Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
Staff Announcement	24/11/2016	Portal User	Bird, Bob [Bob]					

[View Message](#)
[Edit Message](#)

Type
All Messages

Date From
17/11/2016

Date
24/11/2016

[Add to Favourites](#) [Create New Message](#)

4. Press **Edit Message**.

The User Message Maintenance screen is displayed.

User Message Maintenance

Site: AMC

POS User:

Subject: Staff Announcement

Edit View Insert Table Format Tools

Formats Font Family Font Sizes **B** *I* [List Icons]

[Image Icons]

[Text Icons]

All Staff,
Please be aware due to the busy holiday season we will no longer be allowing customers to eat their lunch in the foyer. Please direct them to the nearby cafe.

p Words: 32

[Portal Users](#) [Email Support](#) [Email Address Book](#) [Save](#) [Send Message](#)

5. Edit the fields as required.

See *User Messages Maintenance screen* on page 48.

6. Press  **Save** to save your changes.

User Messages Maintenance screen

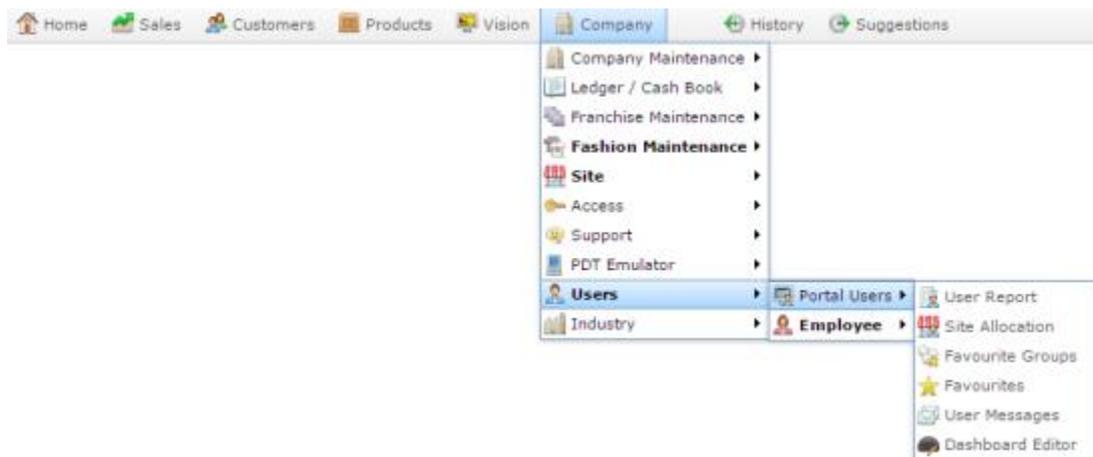
Use this screen to create messages to send to Portal and Point of Sale users, email addresses in your address book, or support.

Note: This screen appears slightly different if you select to send a message to a Point of Sale user.

Opening the User Messages Maintenance screen

To open the User Messages Maintenance screen:

1. Press  **Company** from the menu bar.
2. Press **Users > Portal Users > User Messages**.



The User Messages report is displayed.

User Message Report : All Messages

Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
<u>Test</u>	6/08/2010	Employee						
<u>Test_1</u>	27/02/2011	Employee		27/02/2011	AMC	Tara -> AMC		
<u>Test message</u>	6/08/2010	Employee		6/08/2010	Toms Demonsta	POS 1 -> Toms Demonsta	24/08/2011	✓

Type
All Messages

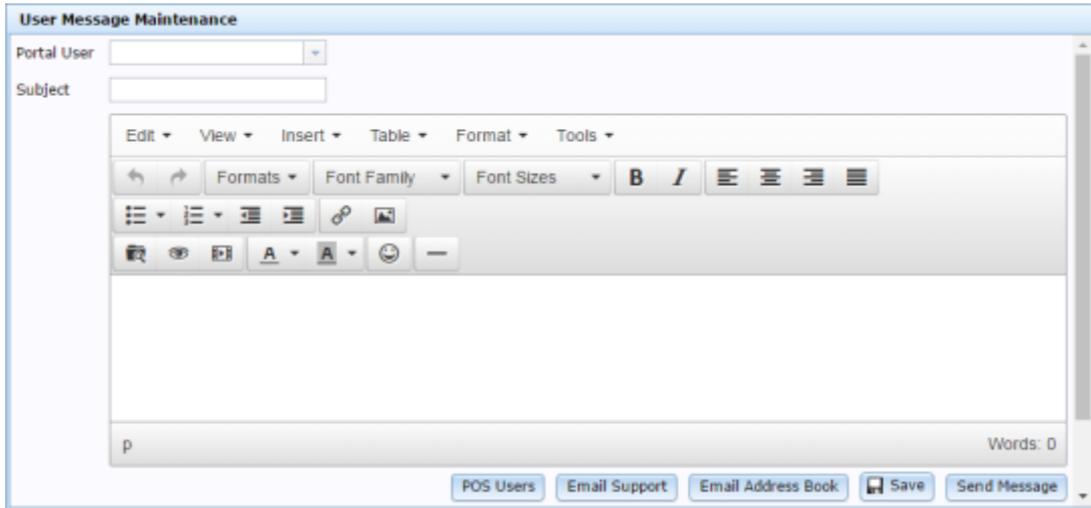
Date From
2/02/2010

Date
24/11/2016

Add to Favourites Create New Message

3. Press the **Subject** of the message you want to view.

The User Messages Maintenance screen is displayed.



User Messages Maintenance screen key fields and buttons

Field	Description
Site	Select the site you want the Point of Sale user to receive the message at. Note: This field is only displayed if you have selected to create a message for a Point of Sale user. Portal users receive their messages on the Portal, so the site is not required.
POS User / Portal User	Select the Portal or Point of Sale user to send the message to. Note: Which field is displayed depends on whether you have selected to send to Portal users or Point of Sale users.
Subject	Type the subject line of the email.
Email body	Type the message you want to send here. Tip: You can format your text to include bold, underline, bullet lists, etc.

Field	Description
<p>POS Users</p>	<p>Switch to creating a message to send to a Point of Sale user.</p> <p>Note: Press  Save before you switch between Portal and POS users, or your subject line and email are deleted.</p>
<p>Portal Users</p>	<p>Switch to creating a message to send to a Portal user.</p> <p>Note: Press  Save before you switch between Portal and POS users, or your subject line and email are deleted.</p>
<p>Email Support</p>	<p>Send this email AMC Convergent IT support.</p> <p>Note: The email is sent immediately when you press the button.</p>
<p>Email Address Book</p>	<p>Send this message to one or more email addresses in your address book.</p> <p>Note: This opens the Email Address Book screen for you to select which email addresses to send the message to. It does not immediately send the email.</p>
<p> Save</p>	<p>Save the changes you have made to this email without sending it.</p>
<p>Send Message</p>	<p>Send this message to the selected users or email addresses.</p>

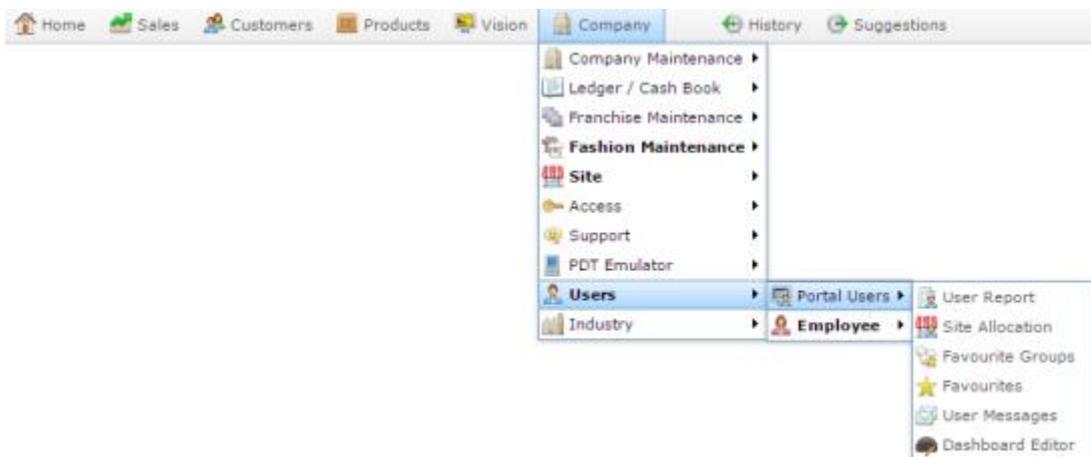
User Message Report

Use the User Messages report to view messages that have been sent to Portal and POS registration screen users, and members of your address book.

Opening the User Messages report

To open the User Messages report:

1. Press  **Company** from the menu bar.
2. Press **Users > Portal Users > User Messages**.



The User Messages report is displayed.

User Message Report : All Messages

Subject	Create Date	System	Sender	Date Sent	Site	Recipient	Opened Date	Read
<u>Test</u>	6/08/2010	Employee						
<u>Test 1</u>	27/02/2011	Employee		27/02/2011	AMC	Tara -> AMC		
<u>Test message</u>	6/08/2010	Employee		6/08/2010	Toms	POS 1 - Demonsta > Toms Demonsta	24/08/2011	✓

Type

Date From

Date

User Messages report key fields

Filters area

Use this area to filter the report data displayed.

Field	Description
Type	Select the type of message to display: <ul style="list-style-type: none">▪ Unread messages.▪ All Received Messages.▪ All Sent Messages.▪ Sent and Read Messages.▪ Not Sent Messages.▪ All Messages.▪ All Deleted Messages.
Date From / Date To	Select the date range to display messages for.
Add to Favourites	Press to add this report to your favourites.
Create New Message	Press to create a new message.

Report area

This area displays the report data.

Note: Depending on your filter selections, some fields may not be displayed.

Field	Description
Subject	Subject line of the email.
Create Date	Date this message was created.
System	The Portal system that created the message.
Sender	The name of the user who sent the message.
Date Sent	The date the message was sent.
Site	The site the message was sent to, if applicable.
Recipient	The name of the person who received the message.
Opened Date	The date the message was opened.
Read	Whether the message has been read.

Glossary

Account

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

Advertising label

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

Appointment (Scheduler)

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

Aged balance

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

Balance

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

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

Barcode

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

Batch (kit manufacture)

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

Batch (stock take)

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

Brand

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

Bonus loyalty points

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

Bulk discount

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

Company

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

Complete Order

A customer order is complete when:

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

Contract

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

Controlled purchase order / Controlled requisition

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

Cost matrix / price matrix

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

A price matrix can be:

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

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

Credit adjustment

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

Credit limit

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

Credit note

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

Creditor

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

Creditor contract

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

Creditor payment

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

Cross-reference

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

Colour

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

Customer

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

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

Debtor

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

Debtor balance

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

Debtor contract

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

Debit adjustment

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

Delivery docket

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

Department

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

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

Department cost level

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

Department promotion

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

Discount

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

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

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

Per-unit discounts can:

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

Per-line discounts can:

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

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

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

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

Division

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

DSD

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

Employee

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

Fashion

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

Family card

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

Fixture

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

Frequent shopper item

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

Gambling machine

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

Gambling session

A gambling session is a period of continuous gambling.

Gambling spin

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

Gambling venue

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

Global price change

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

Group promotion

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

Group purchase order

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

GSA card

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

Home delivery

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

Interest rate

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

Inventory

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

Invoice

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

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

Inter-branch transfers (IBT)

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

Item

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

- Barcode.

Note: An item can have more than one barcode.

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

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

Item group

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

Item label

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

Item options

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

Item type

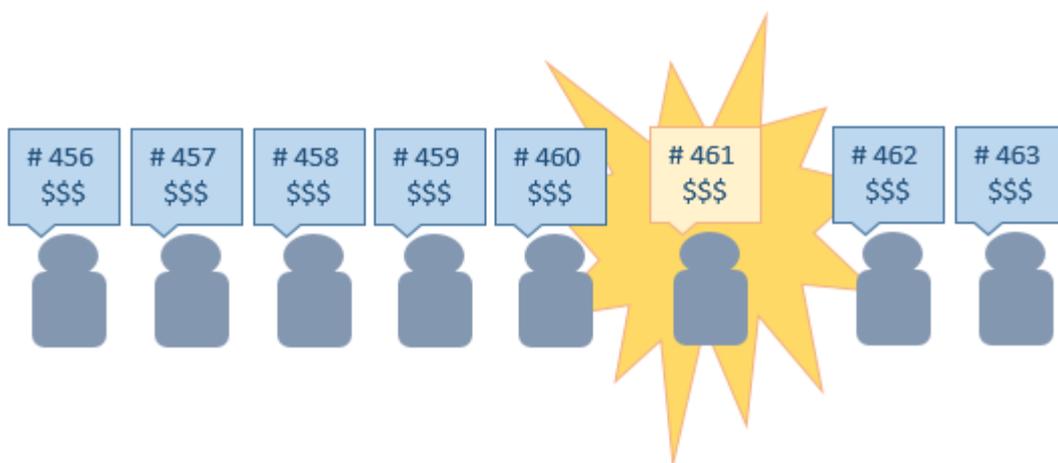
An item type is a way of categorising items for reporting purposes. Items can have only one type.

Item variation

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

Jackpot

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



Journal

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

Kit

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

Label

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

Layby

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

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

Loyalty

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

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

Loyalty is configured for your organisation on the Portal.

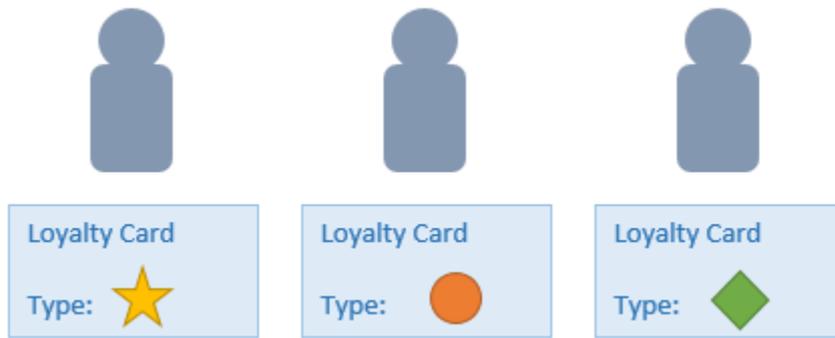
Loyalty card

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

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

Loyalty card type

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

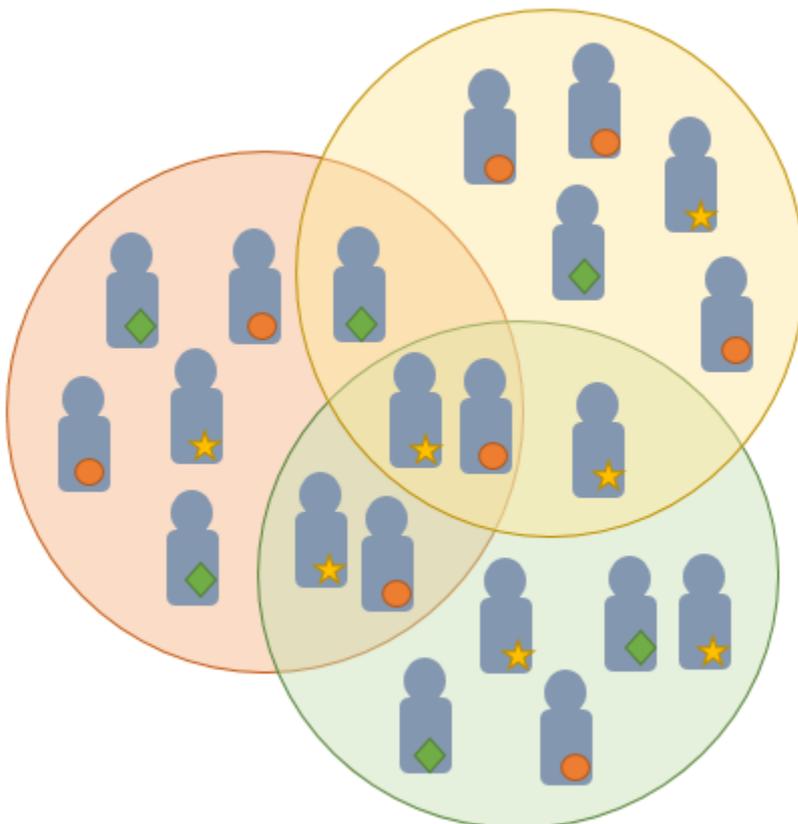


Loyalty department

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

Loyalty group

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



Loyalty points

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

Loyalty voucher

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

Ledger

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

Ledger type

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

Line minimum

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

Mail out

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

Manufactured Kit

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

Marketing member

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

Matching

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

Menu area

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

Modifier item

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

Offer

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

Open transaction

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

Operator

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

Pack

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

Pallet

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

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

Payment terms

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

PDT

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

PLU group

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

PLU Loyalty group

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

Portal Data Interchange (PDI)

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

Permission

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

Portal operator

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

Point of Sale operator

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

Point of Sale supervisor

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

Point of Sale Transaction

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

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

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

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

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

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

Price change

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

Price level

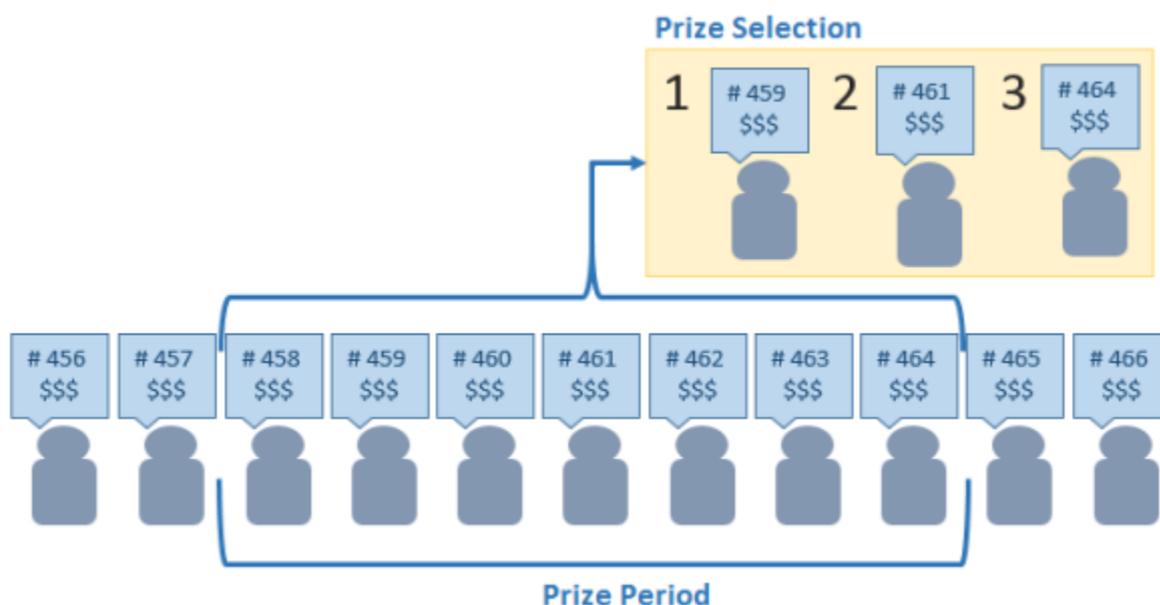
The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

Prime item

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

Prize

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



Procurement

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

Promotion

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

Promotion group

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

Purchase order

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

Quote

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

Rebate

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

Rebate group

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

Rebate item group

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

Receipt

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

Referral

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

Referred item

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

Requisition

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

Roster

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

Sale minimum

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

Scale label

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

Selling item

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

Size

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

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

Shelf label

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

Snap count

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

Special

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

Statement

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

Stock adjustment / write-off

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

Stock item

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

Stock on hand

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

Stock receipt

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

Stock return

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

Stock take

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

Style

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

Supplier

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

Supplier promotion

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

Survey

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

Table booking

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

Table section

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

Table service

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

Terminal (iZen Point of Sale)

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

Tipping

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

Tipping game

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

Tipping group

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

Tipping kiosk

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

Tipping round

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

Tipping team

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

Team venue

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

Transaction line (iZen Point of Sale)

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

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.

Rewards card	
Brian Smith	
Ch & Veg Stirfry 3.992kg N x \$7.99/kg	\$31.90
Gift Voucher recharge	\$50.00
Banana Muffin	-\$2.57
Coffee, Latte	\$3.42
Extra sugar	
Skinny Milk	
Rewards card discount	-\$3.27
Total:	\$79.48
Cash	\$50.00
Credit Card	\$34.10
Rounding	\$0.02
Change	\$4.60

User account

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

Voucher

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

Voucher mask

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

Voucher type

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

Warehouse

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