Portal User Guide

Customers, Laybys And Customer Orders

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Contents

Configuring your company for customer orders

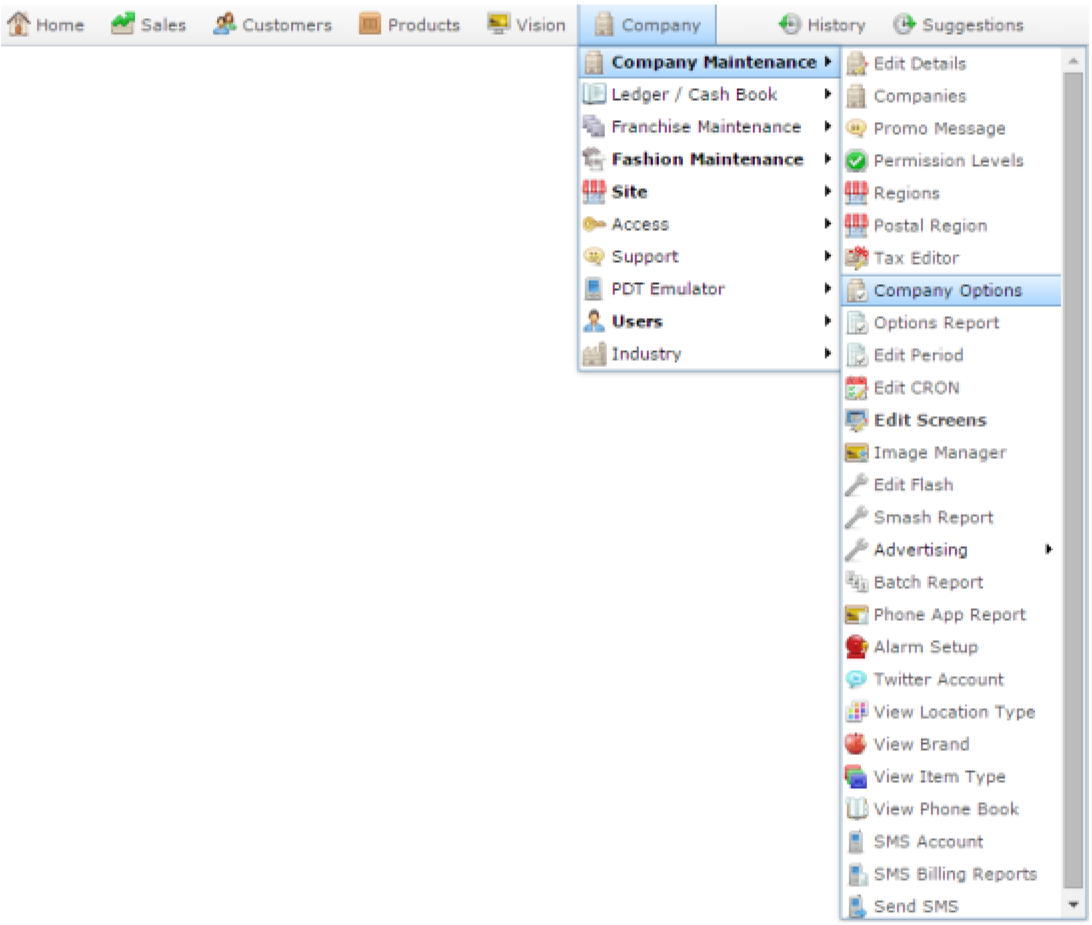
Use the Company Options - Customer Orders section to configure your company for customer orders.

Opening the Company Options - Customer Orders section

To open the Company Options - Customer Orders section:

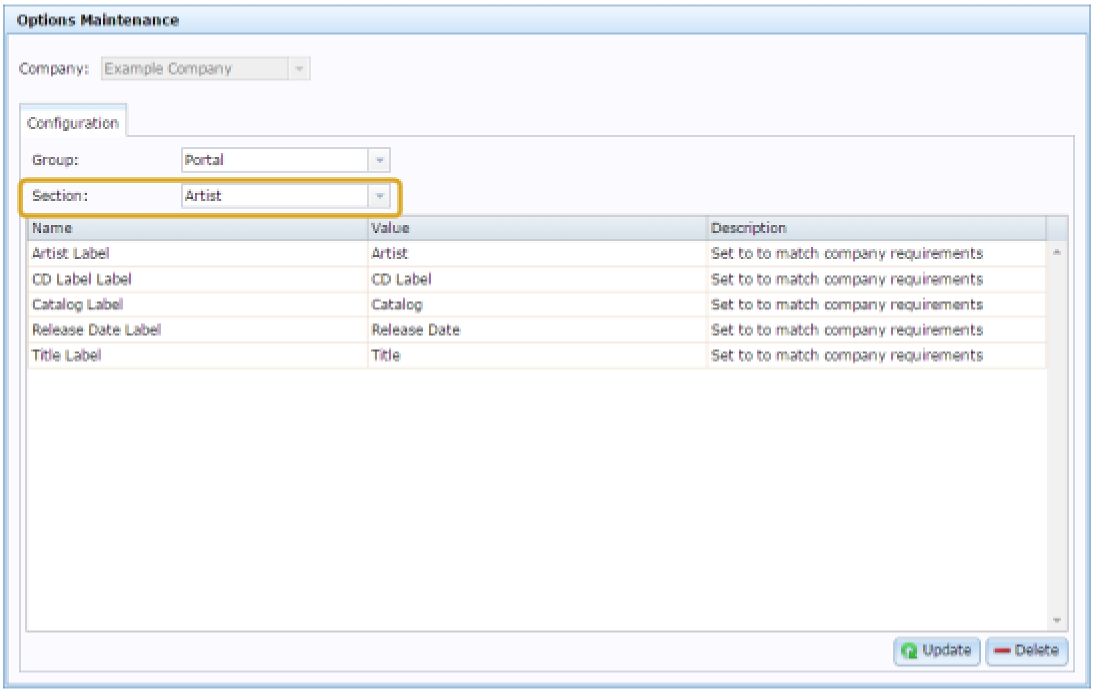
1. Press 

.
2. Press **Company Maintenance > Company Options**.



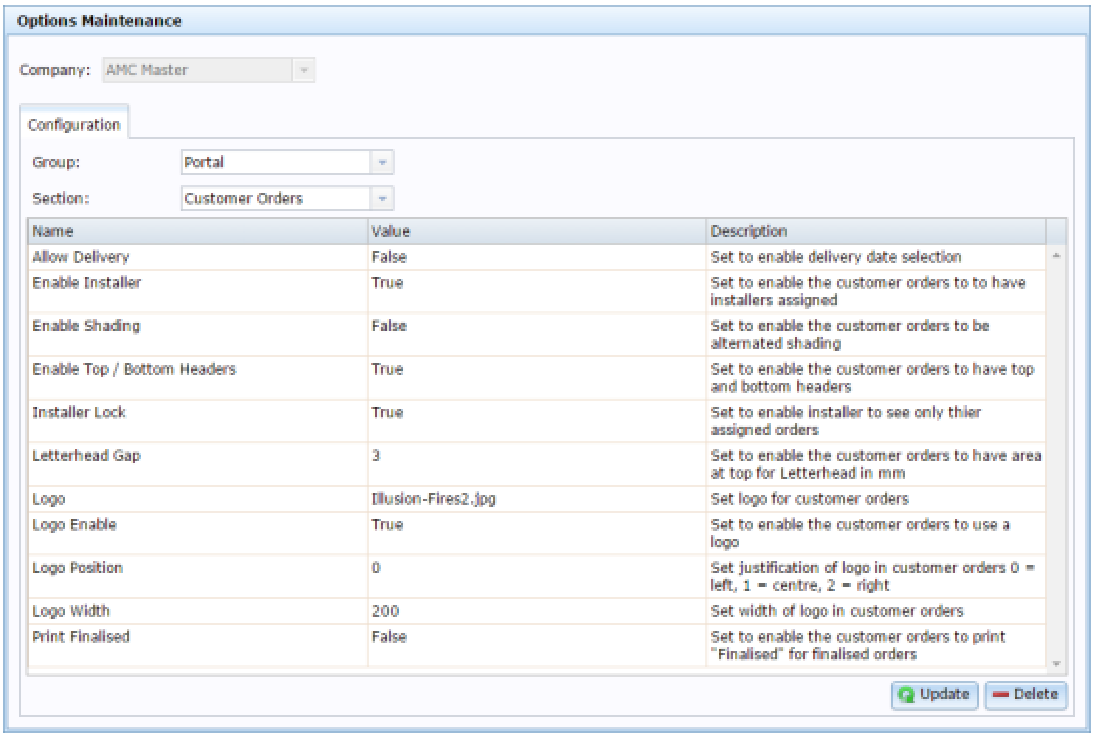
The Artist section of the Company Options screen is displayed.

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



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

   The Customer Orders section is displayed.



Company Options - Customer Orders section key fields and buttons

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

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

Configuring your company for customer relations management

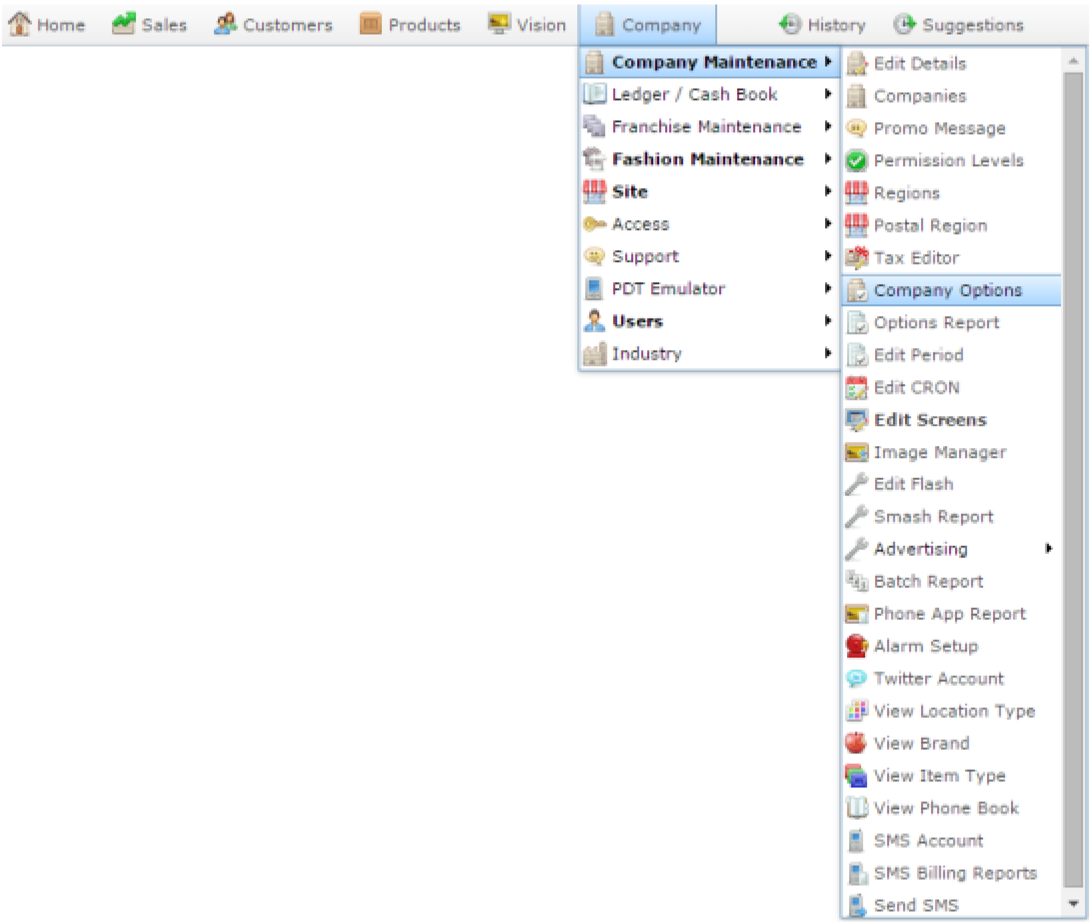
Use the Company Options - CRM Compulsory section to configure your company for customer relations management.

Opening the Company Options - CRM Compulsory section

To open the Company Options - CRM Compulsory section:

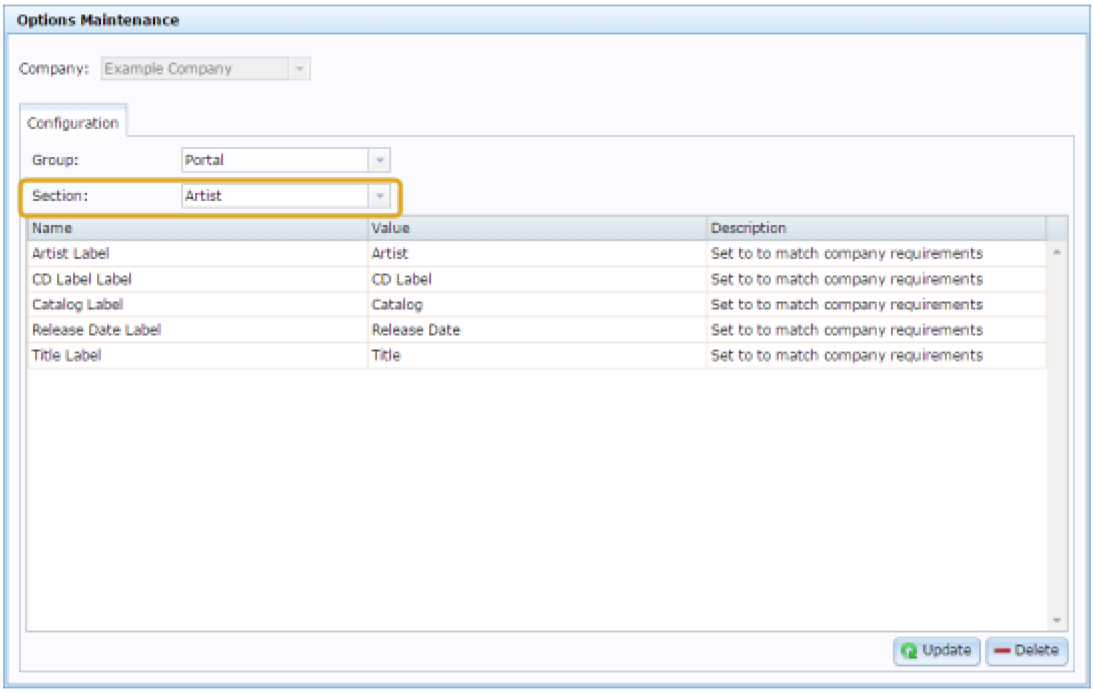
1. Press 

.
2. Press **Company Maintenance** > **Company Options**.



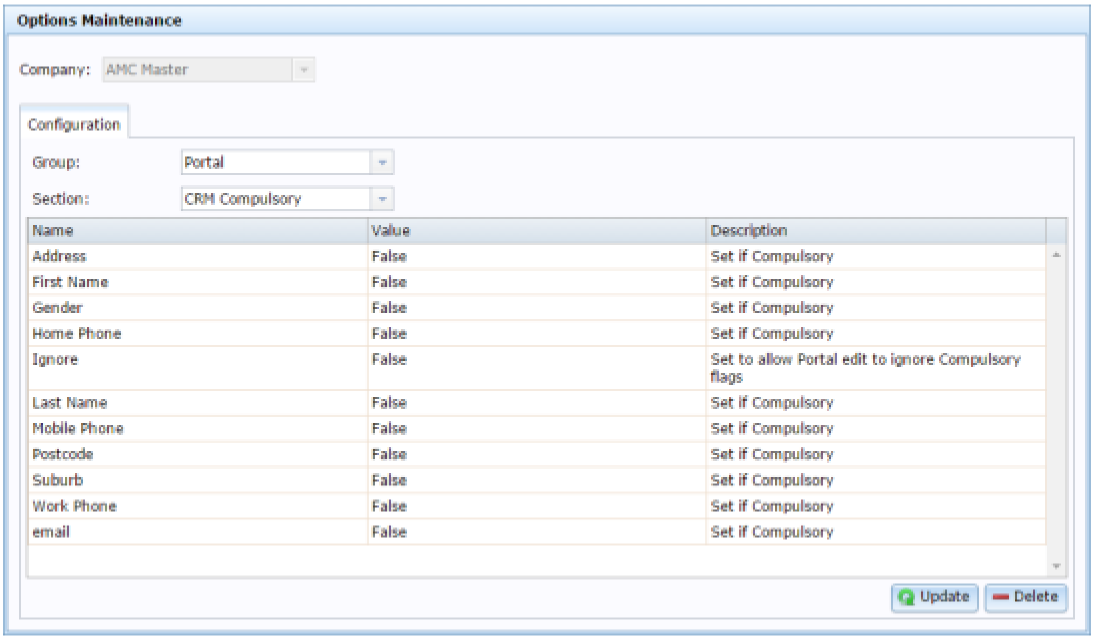
The Artist section of the Company Options screen is displayed.

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



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

   The CRM Compulsory section is displayed.



Company Options - CRM Compulsory section key fields and buttons

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

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

Configuring creditor contracts for your site

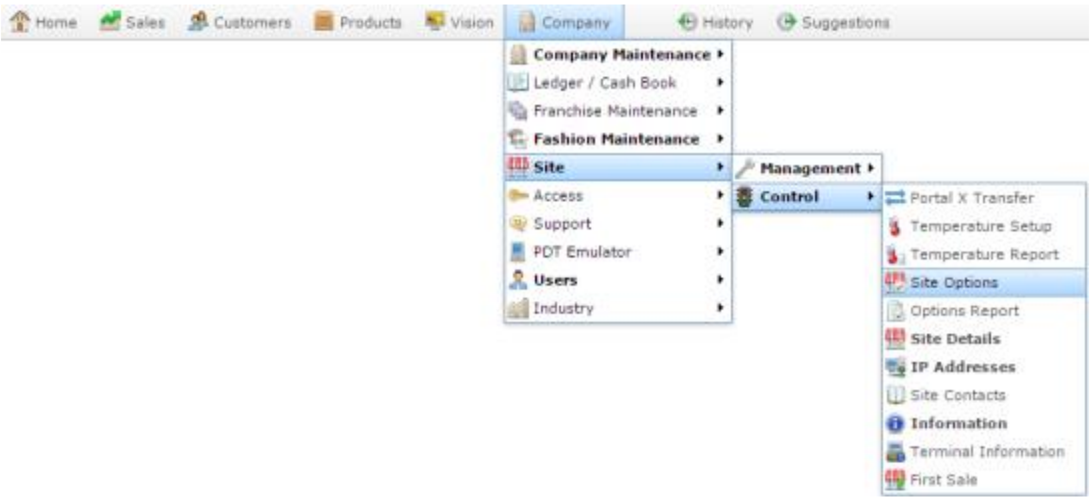
Use the Site Options - Creditor Contracts section to configure how your site manages creditor contracts.

Opening the Site Options - Creditor Contracts section

To open the Site Options - Creditor Contracts section:

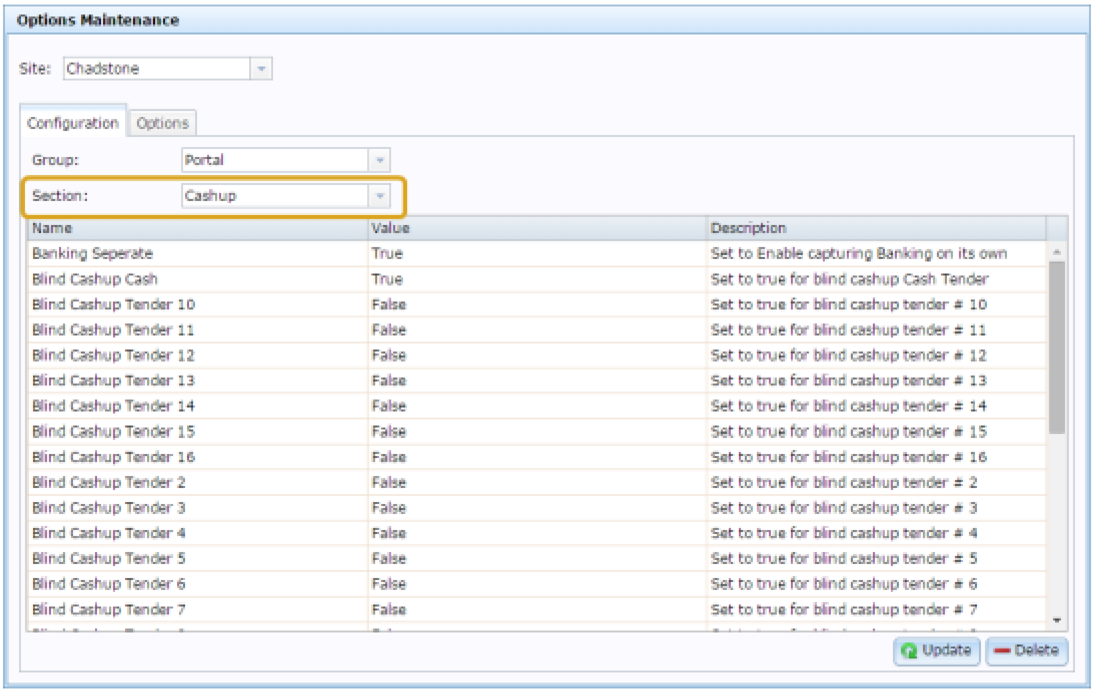
1. Press 

.
2. Press **Site** > **Control** > **Site Options**.



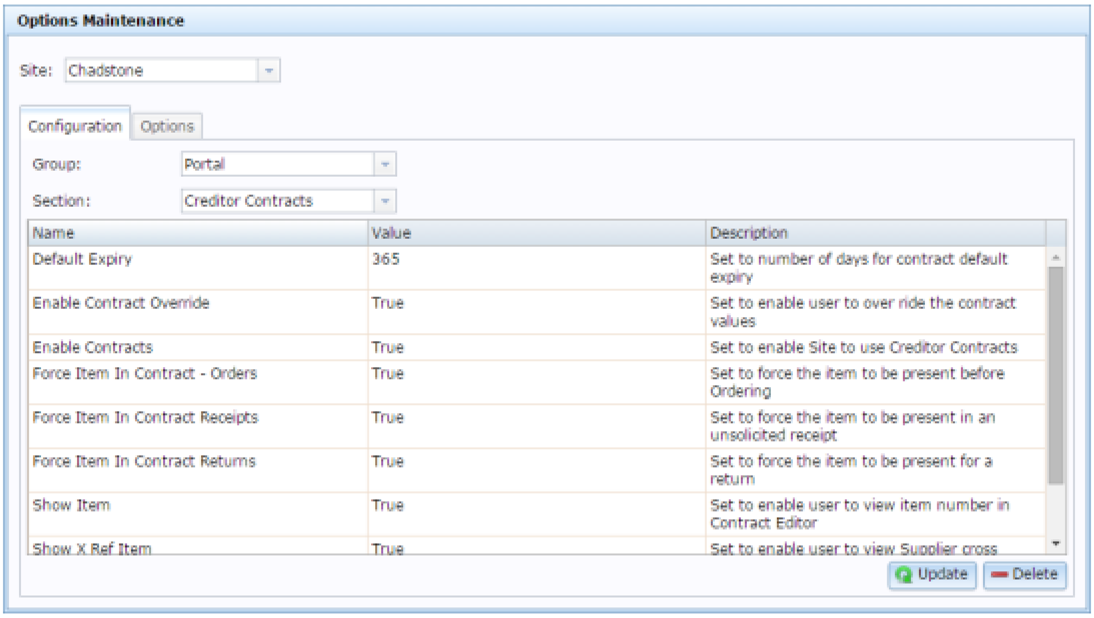
The Cashup section of the Site Options screen is displayed.

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



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

   The Creditor Contracts section is displayed.



Site Options - Creditor Contracts section key fields and buttons

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

Name	Value	Description
Example Field Name	Example Value	Description of configuration

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

Configuration	Description
Show Item	Type **True** to display the item code in Contract Maintenance.
Show X Ref Item	Type **True** to display the supplier's code for the item in Contract Maintenance.
Update Cost of Contract in Receipts	Type **True** 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:

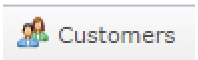
1. *Creating a new template* on page 17.
2. *Editing a template description* on page 21.
3. *Editing a template layout* on page 23.
4. *Deleting a template* on page 26.

Creating a new template

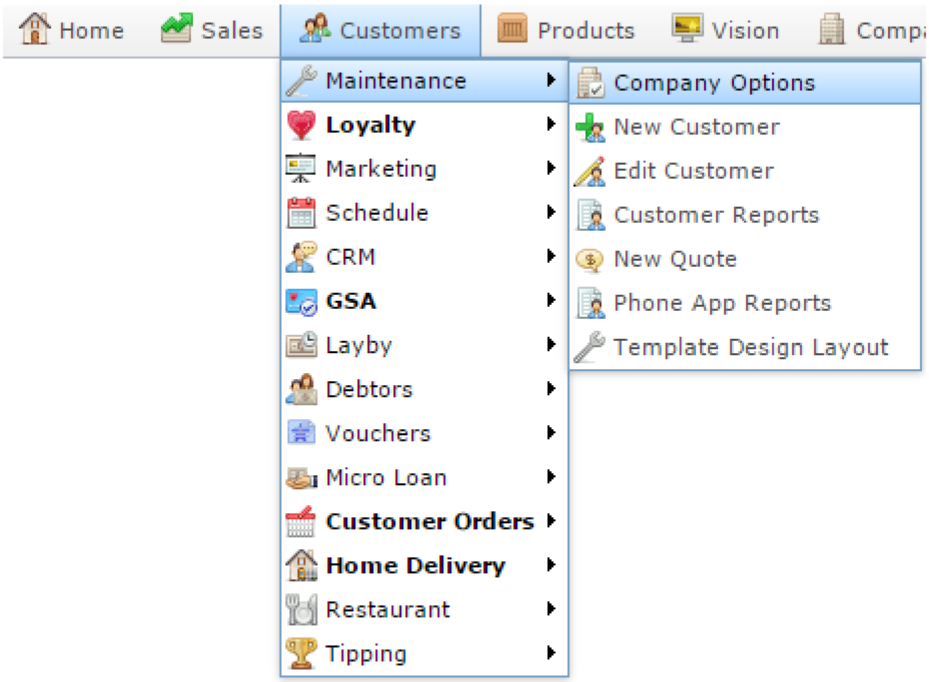
Create a new template to control how your documents are displayed and printed. The procedure is the same to create templates for:

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

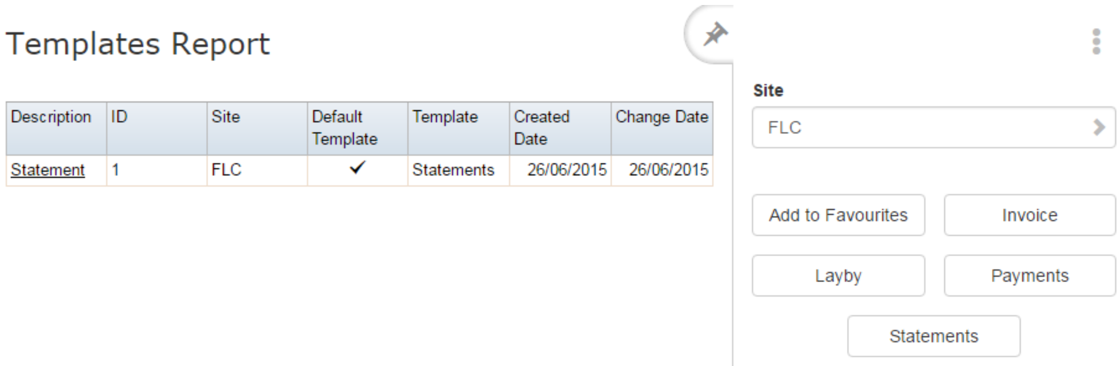
To create a new template:

1. Press 

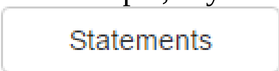
from the menu bar.
2. Press **Maintenance > Template Design Layout**.



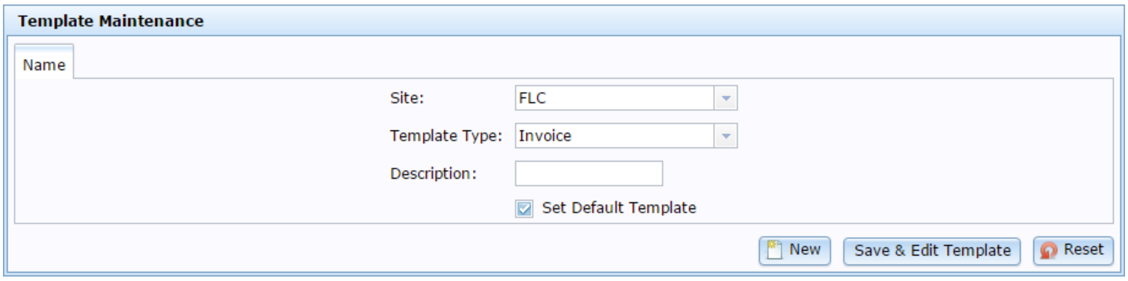
The Templates report is displayed.

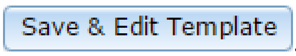


3. Press the button corresponding to the type of document you want to create.

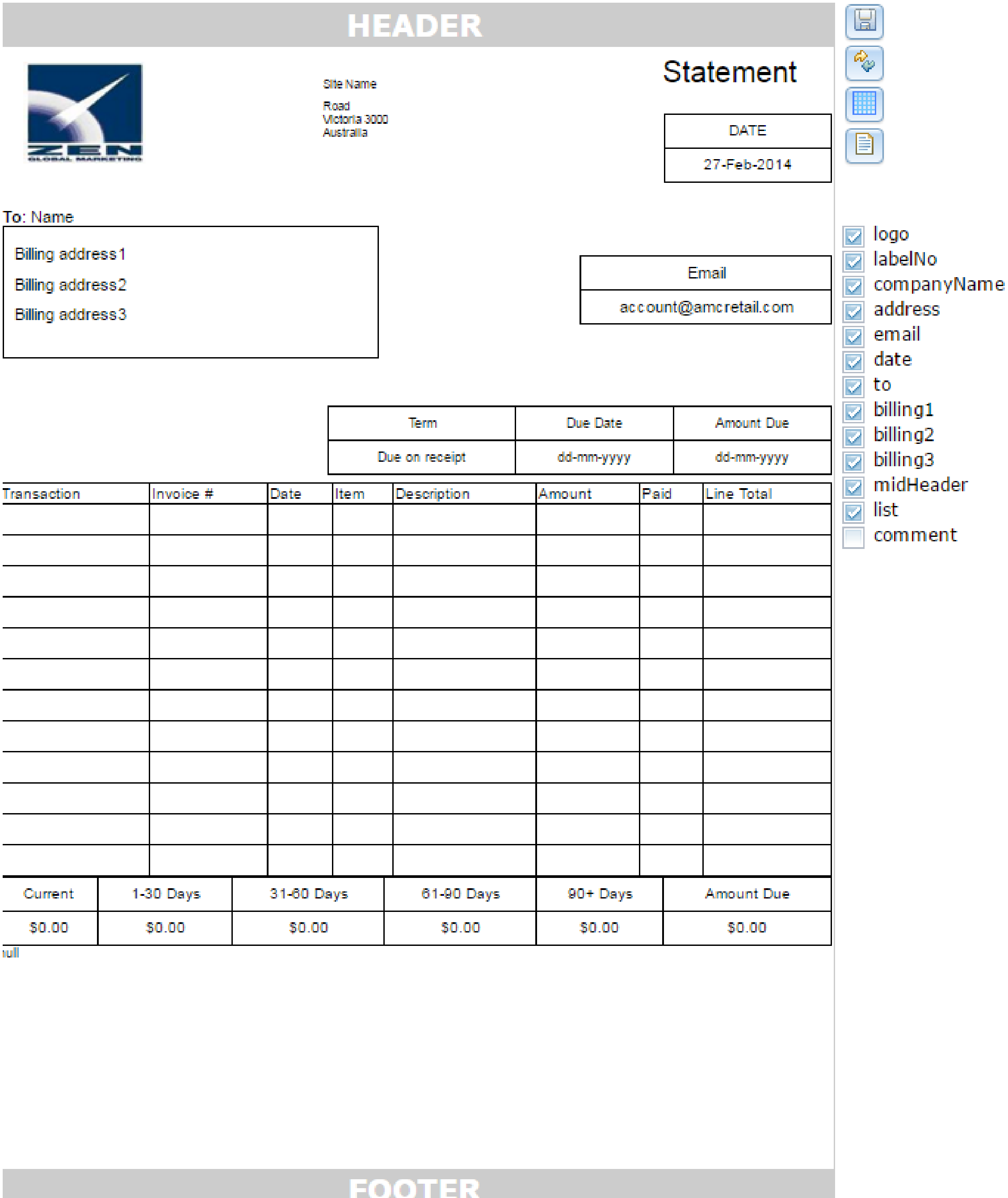
   For example, if you want to create a new template for statements, press .

   The Template Maintenance screen is displayed.



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 .

   The Template Editor is displayed.



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 .

   The template is saved.

Editing a template description

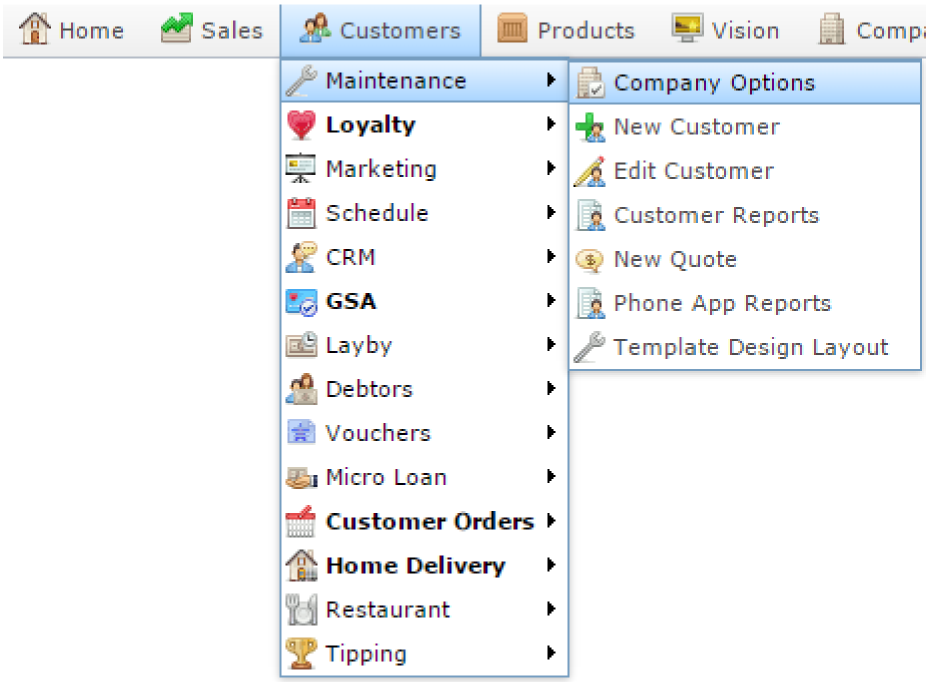
Edit a template description if you want to change the name of the template, the site that can use it or whether or not it is the default template for that document type.

Note: If you want to edit a template's layout, see *Editing a template layout* on page 23.

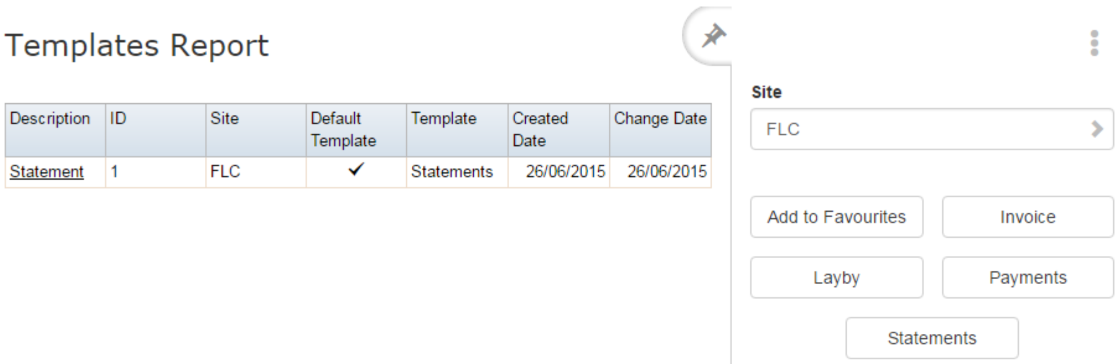
To edit a template description:

1. Press 

from the menu bar.
2. Press **Maintenance > Template Design Layout**.

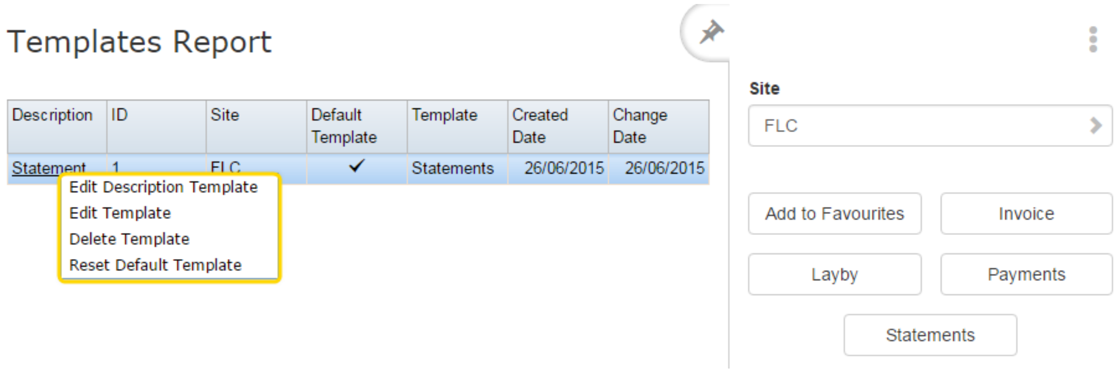


The Templates report is displayed.



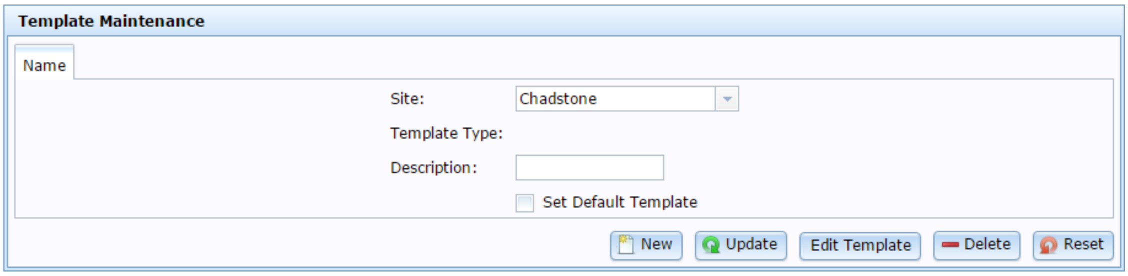
3. Press the **Description** of the template you want to edit.

A popup menu is displayed.



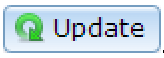
4. Press **Edit Description Template**.

   The Template Maintenance screen is displayed.



5. Make the required changes.

   See *Template Maintenance screen* on page 28.

6. Press 

.

   The changes are saved.

Editing a template layout

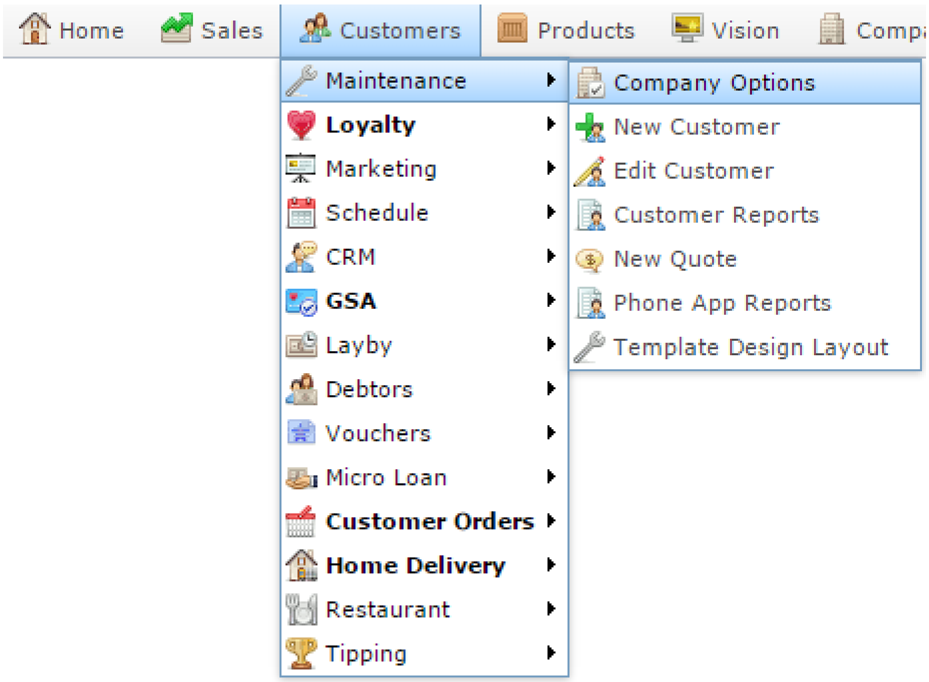
Edit a template layout if you want to change the appearance of documents generated by the Portal. Documents that have already been created from the template are not affected.

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

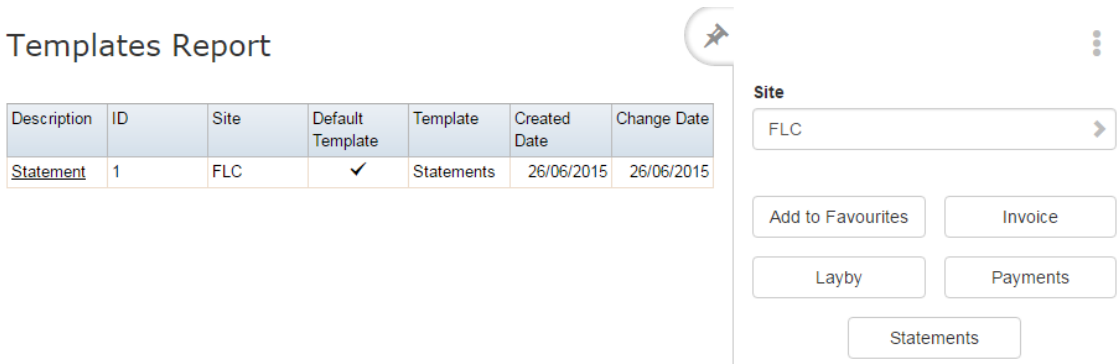
To edit a template layout:

1. Press 

from the menu bar.
2. Press **Maintenance** > **Template Design Layout**.

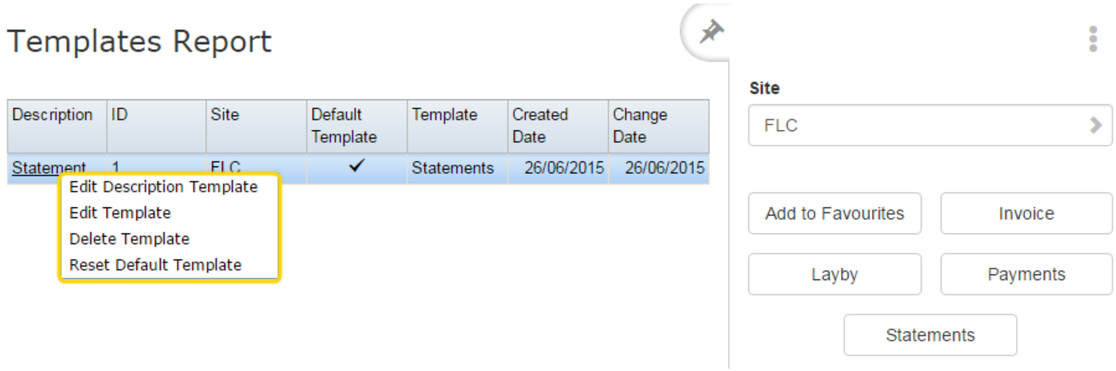


The Templates report is displayed.



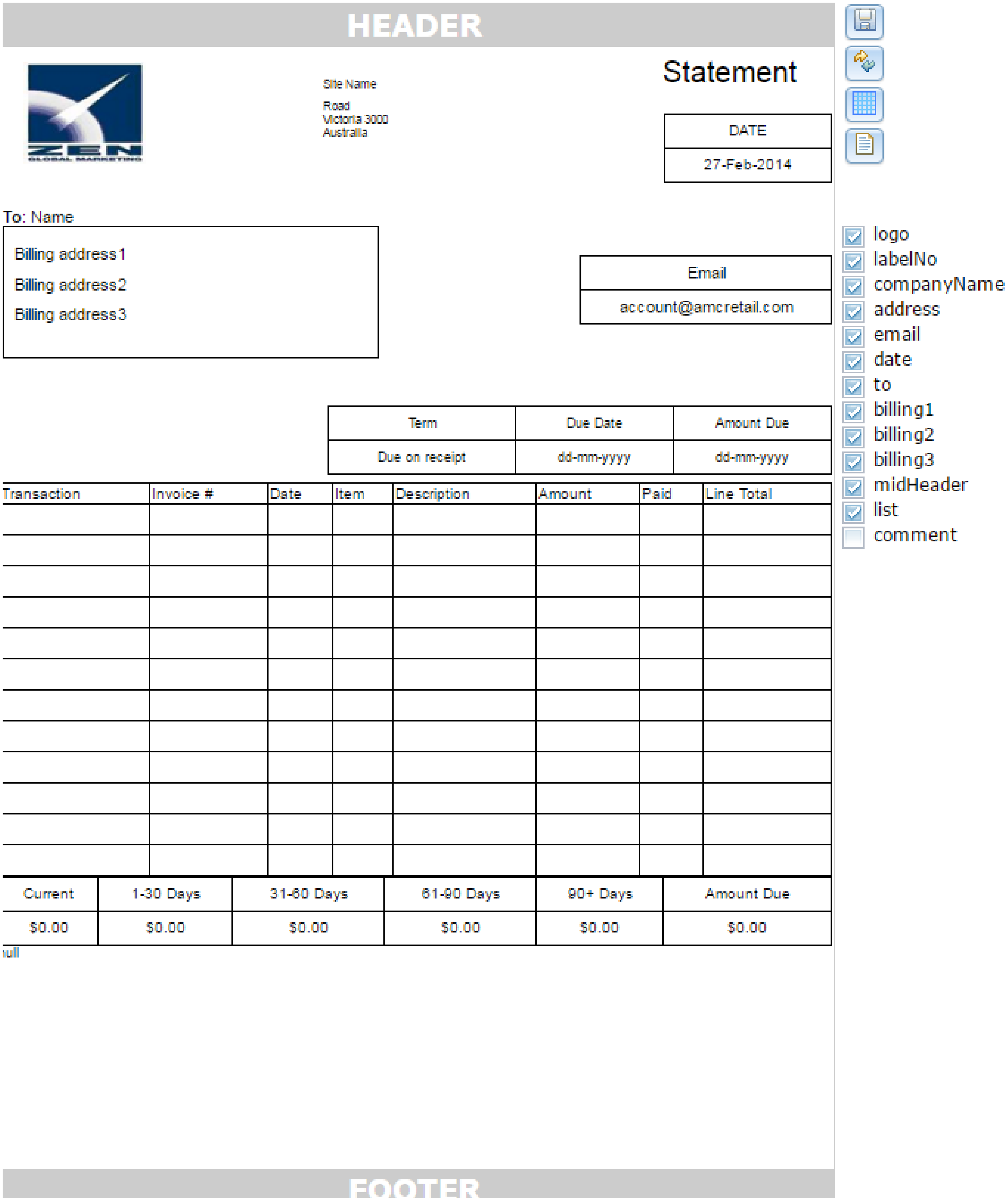
3. Press the **Description** of the template you want to edit.

   A popup menu is displayed.



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.

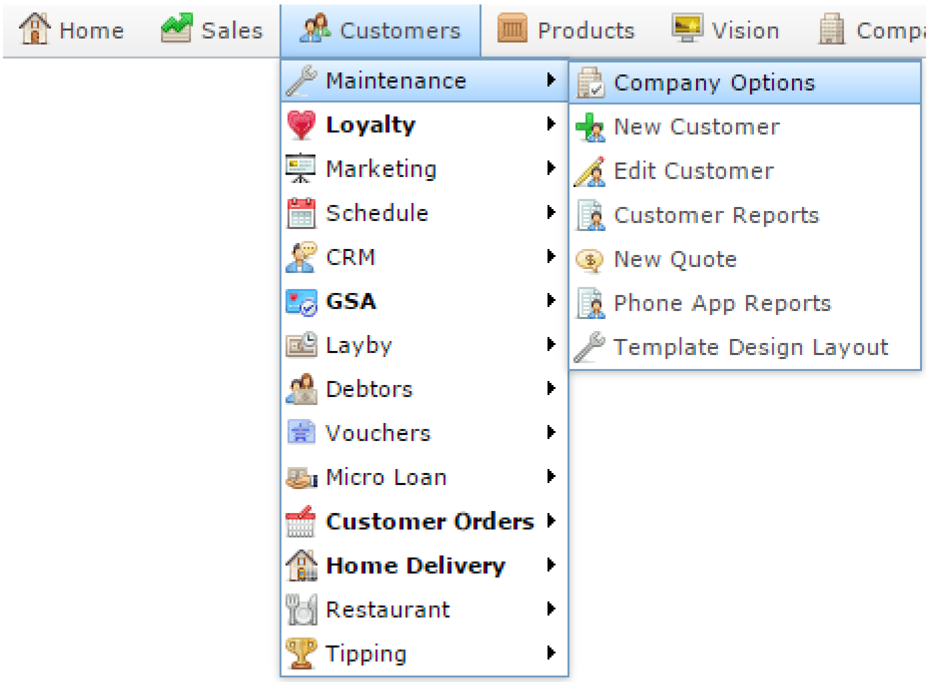
Deleting a template

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.

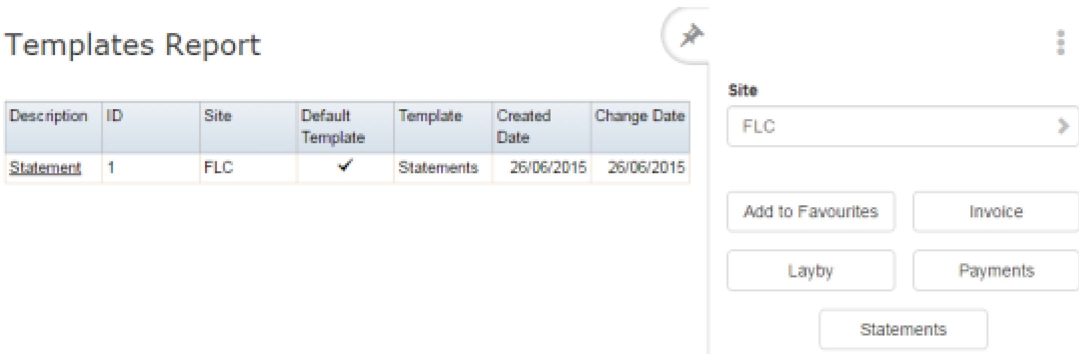
To delete a template:

1. Press 

from the menu bar.
2. Press **Maintenance** > **Template Design Layout**.

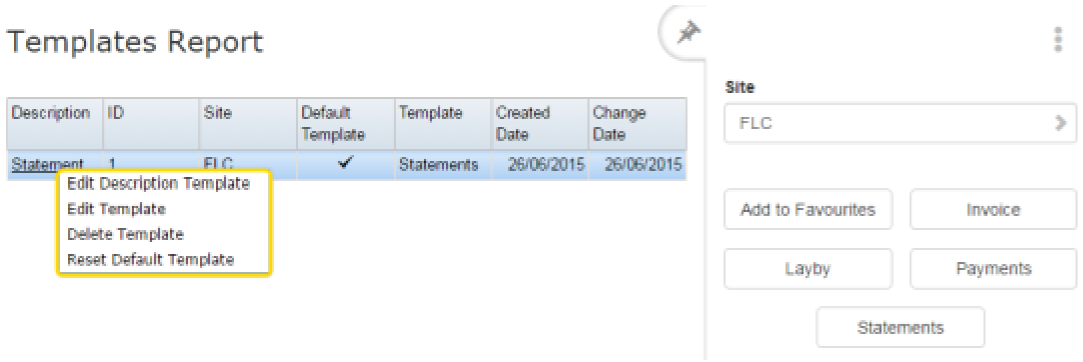


The Templates report is displayed.



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

   A popup menu is displayed.



4. Press **Delete Template**.

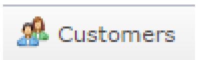
   The template is deleted.

Template Maintenance screen

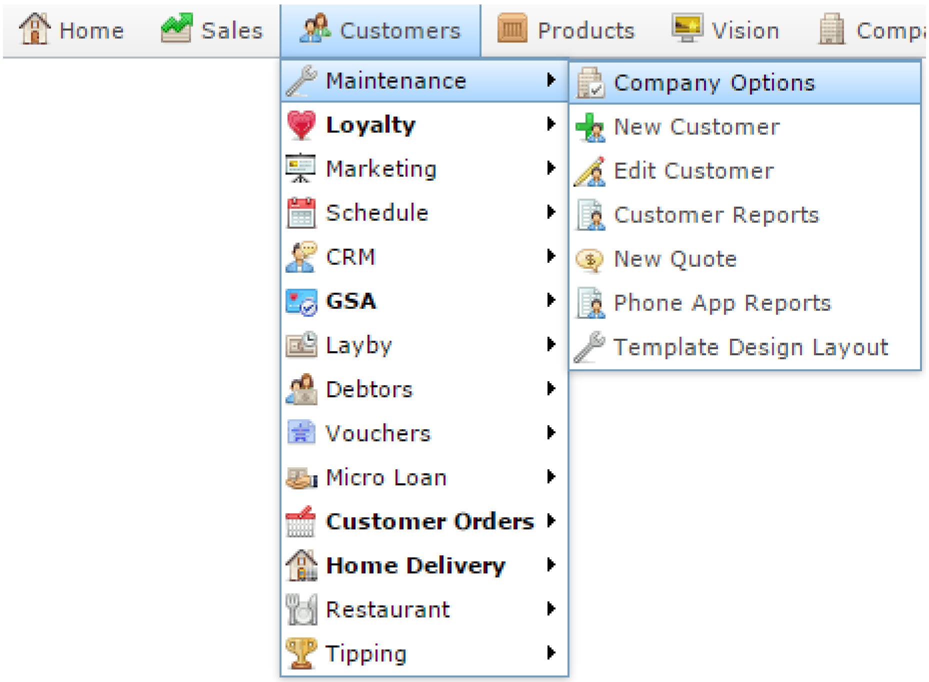
Use this screen to create or rename a template and allocate it to a site.

Opening the Template Maintenance screen

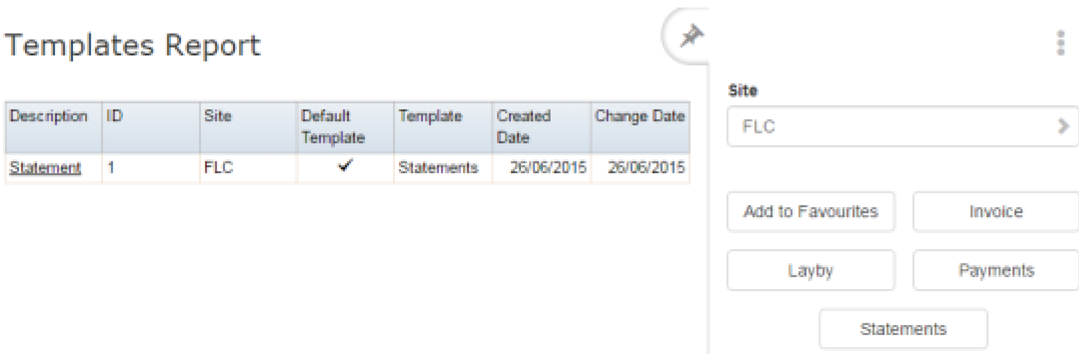
To open the Template Maintenance screen:

1. Press 

from the menu bar.
2. Press **Maintenance > Template Design Layout**.

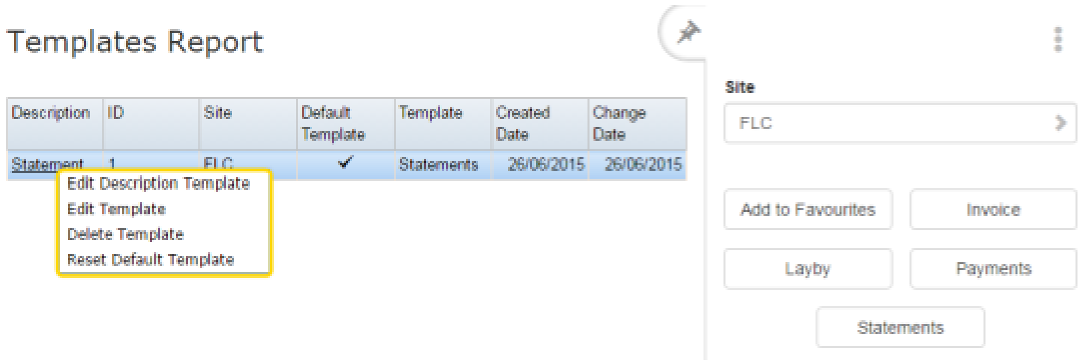


The Templates report is displayed.



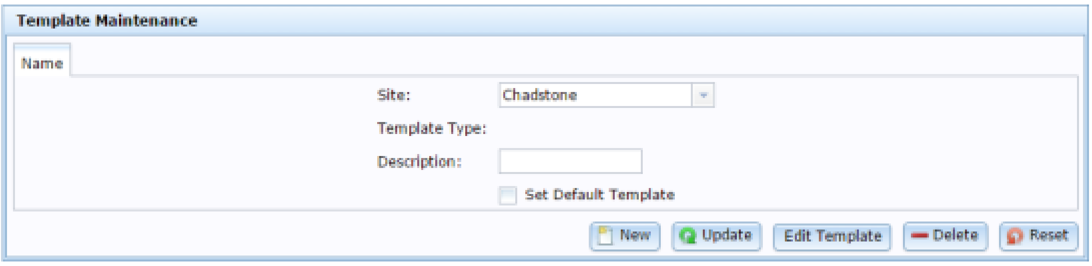
3. Press the **Description** of the template you want to view.

   A popup menu is displayed.



4. Press **Edit Description Template**.

   The Templates Maintenance screen is displayed.



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.
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

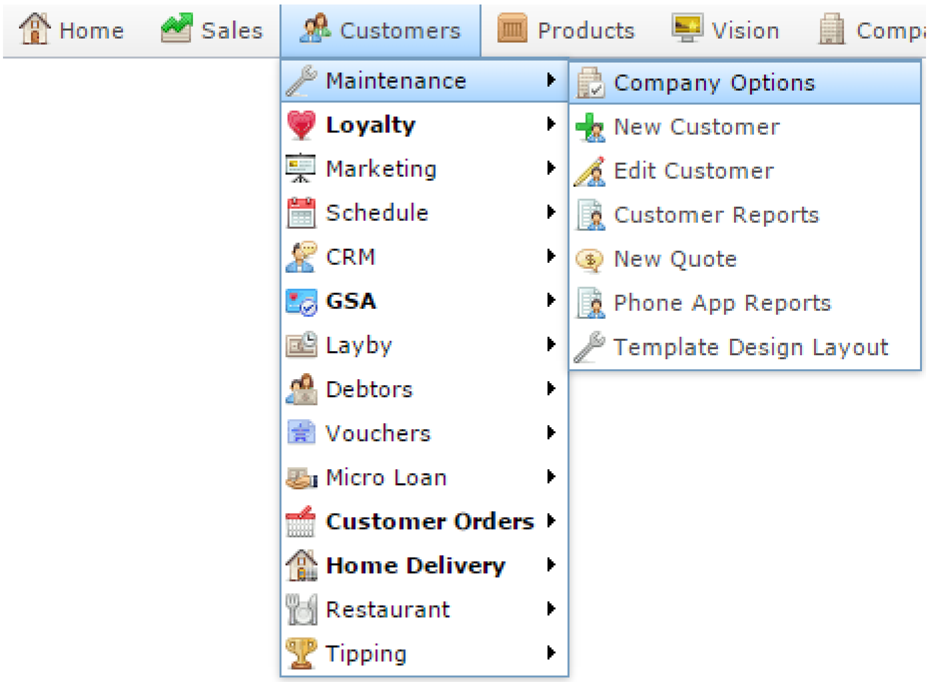
Use this screen to design your document template. You can control which items appear on a template, where they appear as well as aspects of how they appear, such as their alignment.

Opening the Template Editor

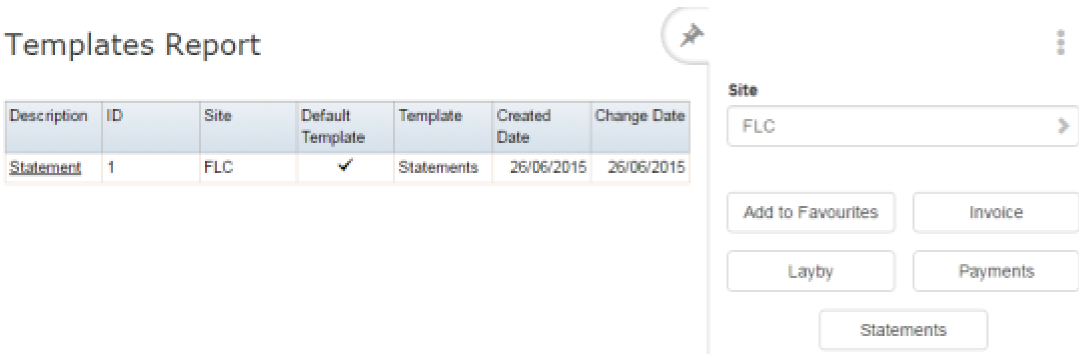
To open the Template Editor:

1. Press  from the menu bar.

2. Press **Maintenance > Template Design Layout**.

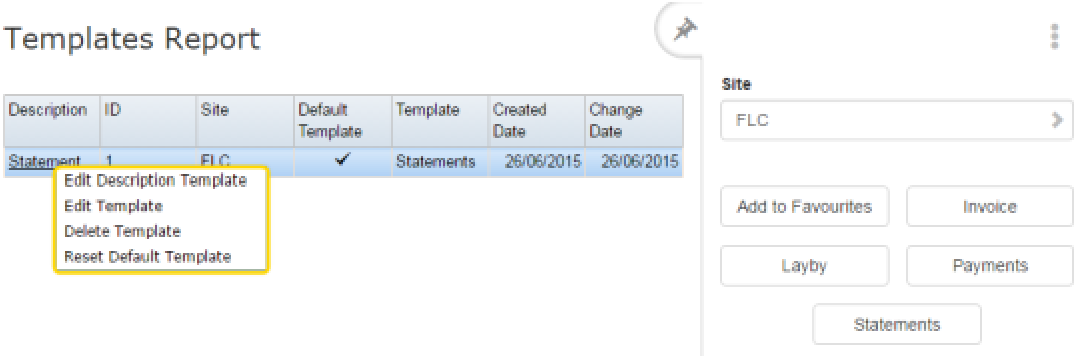


The Templates report is displayed.



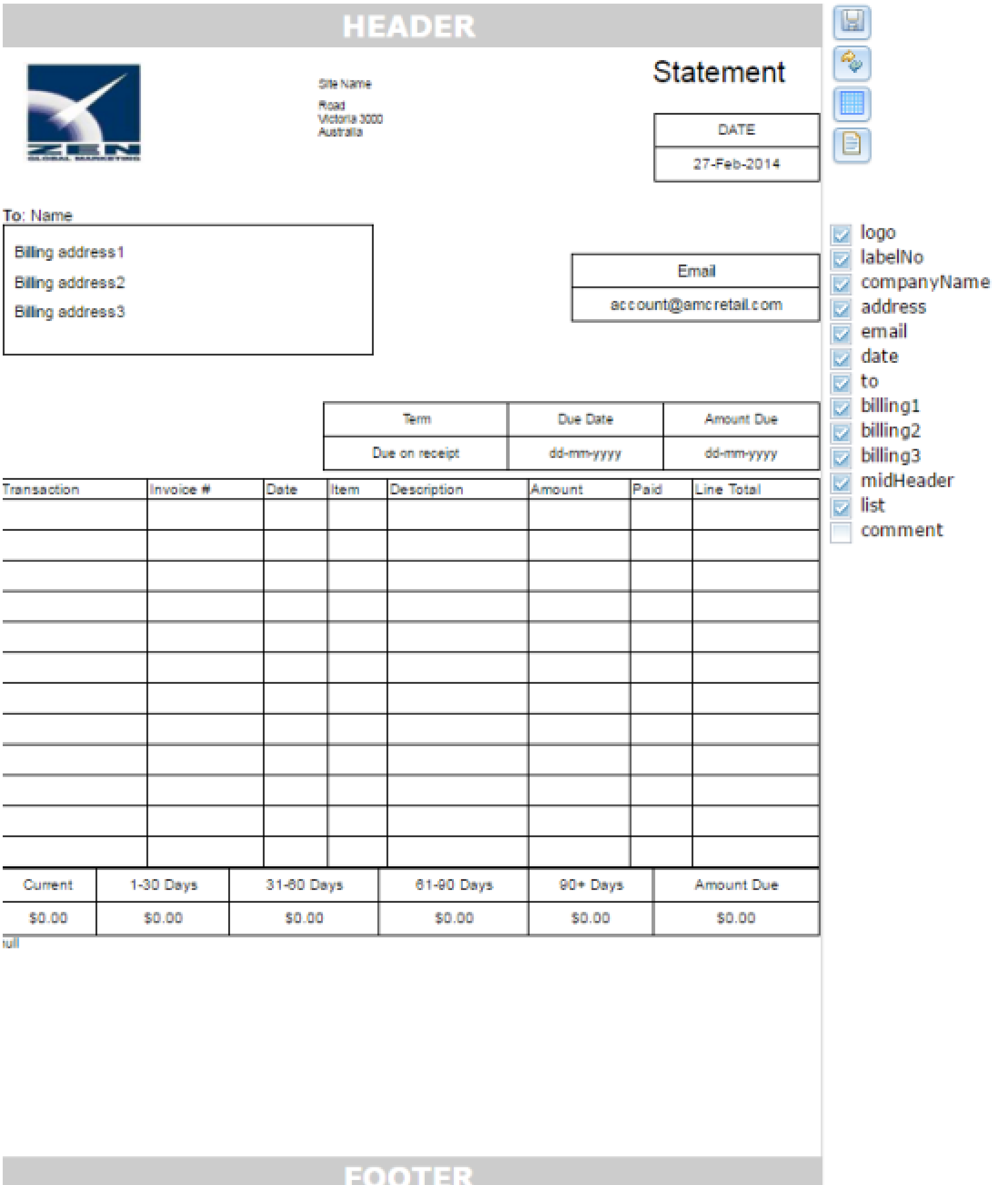
3. Press the **Description** of the template you want to view.

   A popup menu is displayed.



4. Press **Edit Template**.

   The Template Editor is displayed.


HEADER
Statement
Site Name
Road
Victoria 3000
Australia
DATE
27-Feb-2014
To: Name
Billing address1
Billing address2
Billing address3
Email
account@amcretail.com
Term
Due Date
Amount Due
Due on receipt
dd-mm-yyyy
dd-mm-yyyy
Transaction
Invoice #
Date
Item
Description
Amount
Paid
Line Total
Current
1-30 Days
31-60 Days
61-90 Days
90+ Days
Amount Due
$0.00
$0.00
$0.00
$0.00
$0.00
$0.00
FOOTER
logo
labelNo
companyName
address
email
date
to
billing1
billing2
billing3
midHeader
list
comment

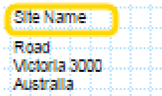
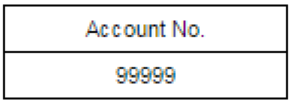
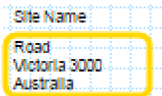
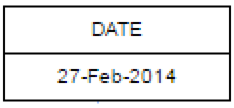
Template Editor key fields and buttons

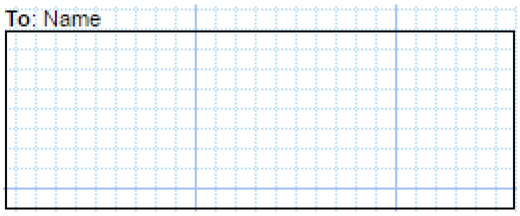
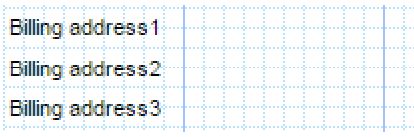
Control Pane

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.
	Press to cancel any changes since the template was last saved.
	Press to display a grid on the template to align components. **Note:** 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. 

Field	Description
CompanyName	Select to include your site name in the template. You can drag it around the template to position it where you want it. 
Account	Select to include the customer account number. 
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. 
Email	Select to include the contact email in the template. You can drag it around the template to position it where you want it. 
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. 

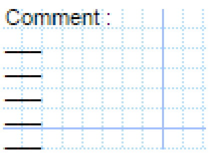
Field	Description
To	Select to include the box and 'To' field in the template. You can drag it around the template to position it where you want it. 
Billing1 / **Billing 2 /** **Billing 3**	Select to include the first, second and third lines of the billing address in the template. You can drag it around the template to position it where you want it. 
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 **Delivered**.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>MidHeader</td><td>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.

<table><tr><td>Term</td><td>Due Date</td><td>Amount Due</td></tr><tr><td>Due on receipt</td><td>dd-mm-yyyy</td><td>dd-mm-yyyy</td></tr></table></td></tr>
<tr><td>CustomerHeader</td><td>Select to include summarised customer information such as the customer's business or tax number, purchase order number or billing company.</td></tr>
<tr><td>List</td><td>Select to include the itemised list in the template. You can drag it around the template to position it where you want it.

<table><tr><td>Transaction</td><td>Invoice #</td><td>Date</td><td>Item</td><td>Description</td><td>Amount</td><td>Paid</td><td>Line Total</td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table></td></tr>
<tr><td>Comment</td><td>Select to include an optional comment in the template. You can drag it around the template to position it where you want it.

</td></tr>
</table>

Template area

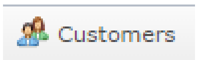
This area determines where components appear on the template. Drag and drop components to create the template you want. You can add or remove components from the template using the control pane.

Templates report

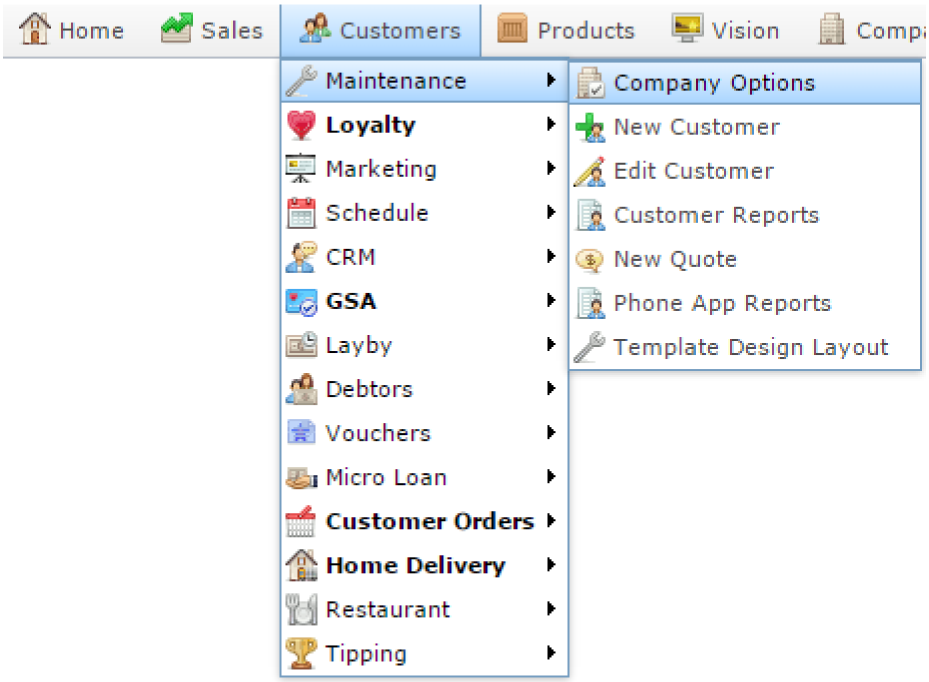
Use the Templates report to view, create and edit templates for communication documents such as invoices, statements, payment notices and laybys.

Opening the Templates report

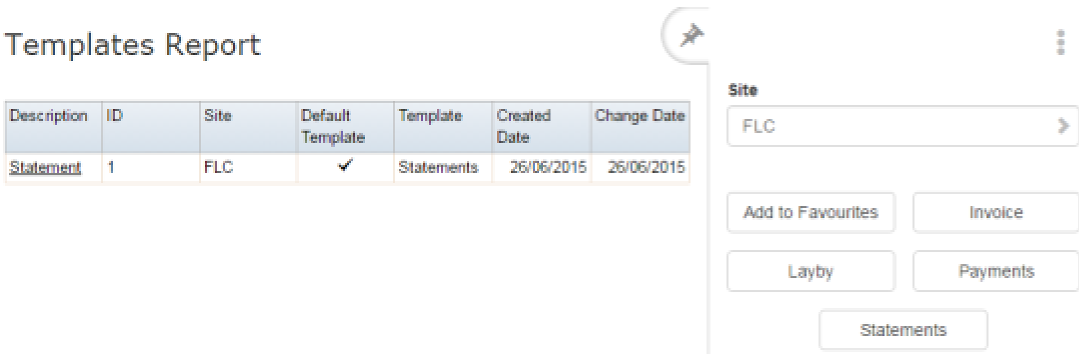
To open the Templates report:

1. Press 

from the menu bar.
2. Press **Maintenance > Template Design Layout**.



The Templates report is displayed.



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

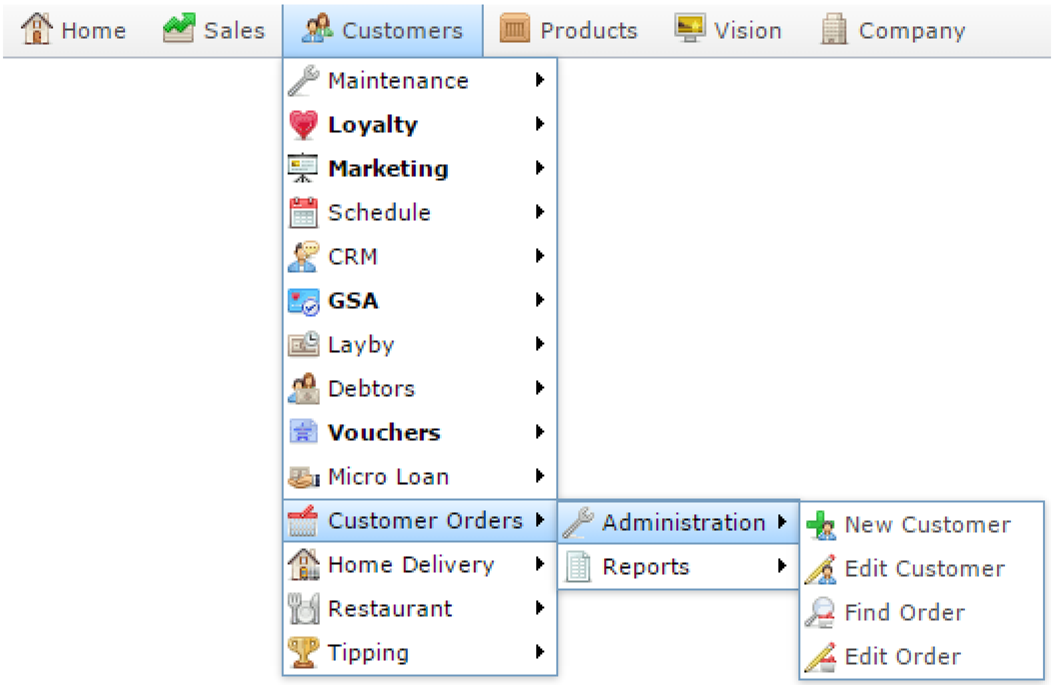
Create a new customer order when a customer wants to purchase specific items from your company that cannot be immediately delivered through the Point of Sale.

Note: You cannot save the order until items have been added to it.

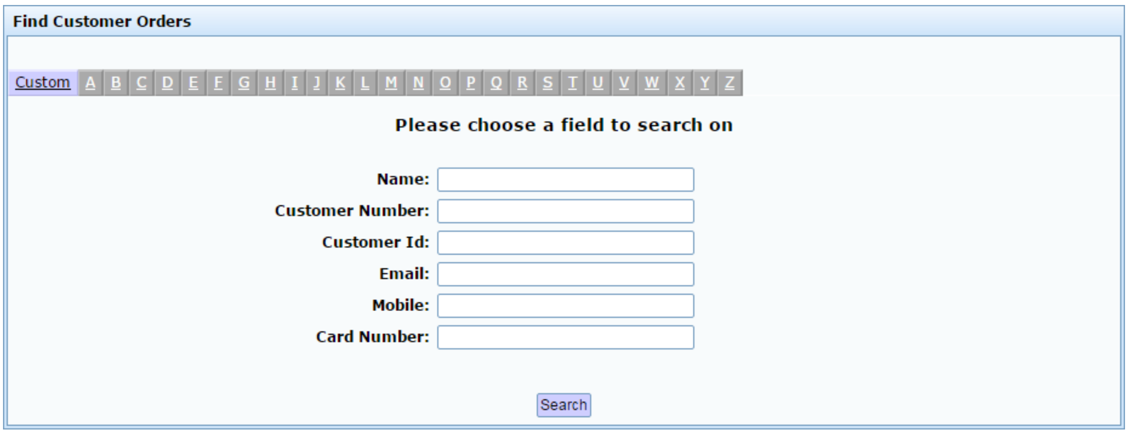
To create a new customer order:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **Edit Order**.



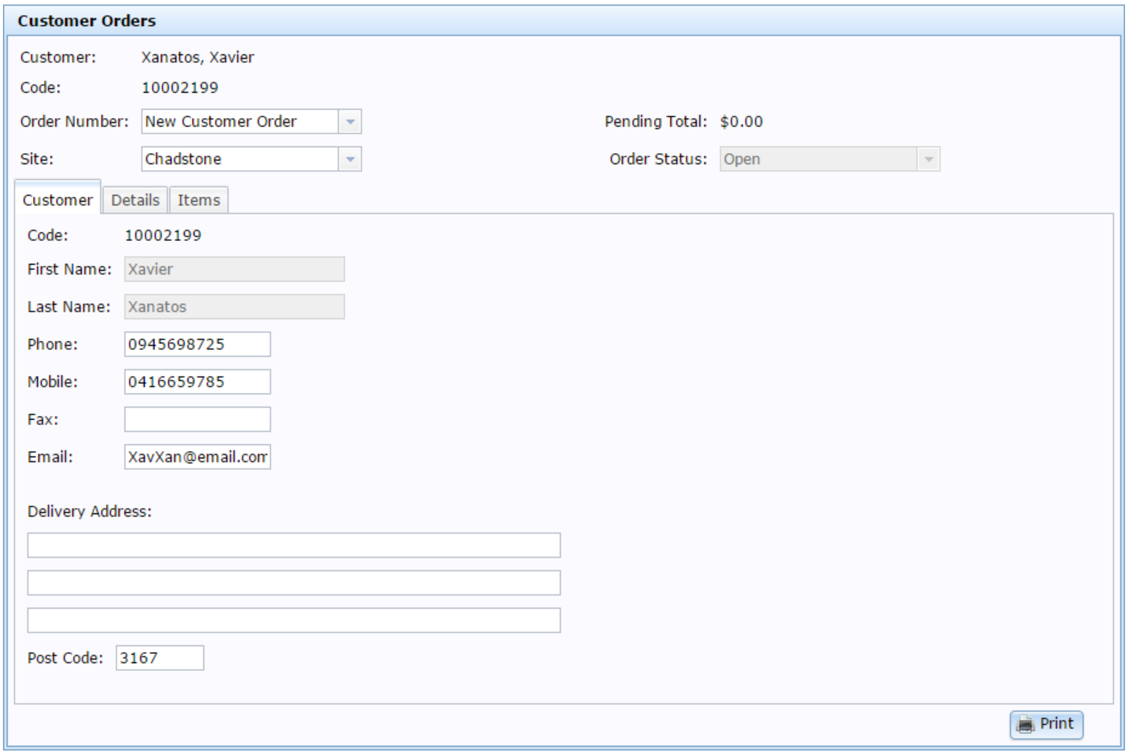
The Find Customer Order screen is displayed.



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.

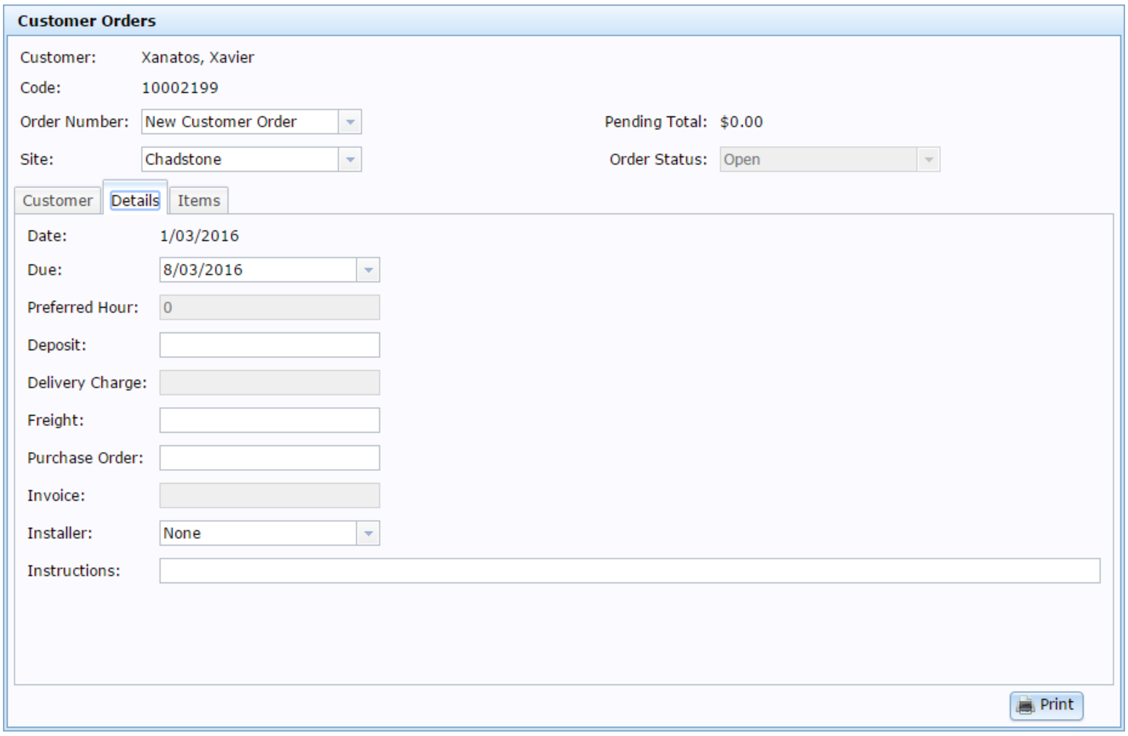


4. Select **New Customer Order** in the **Order Number** drop-down field.
5. Select the **Site** for the customer order.

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

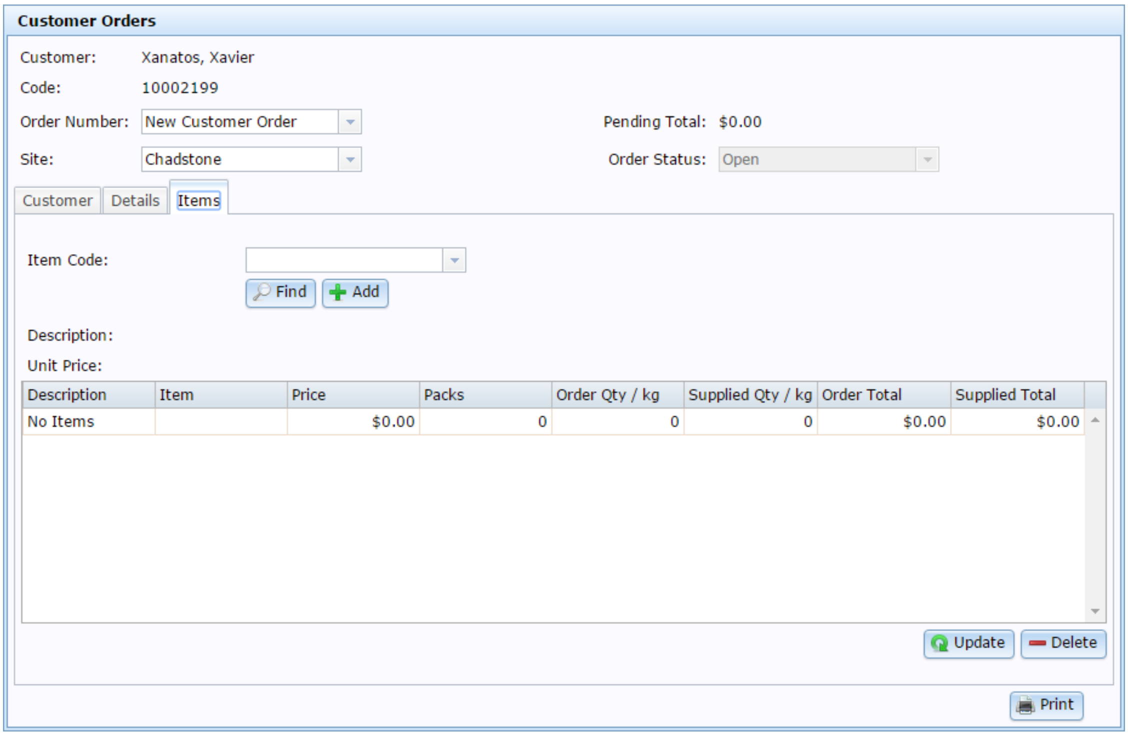
6. Type the address the order is to be delivered to in the **Delivery Address** field.
7. Press the Details tab.

   The Details tab is displayed.



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

   The Items tab is displayed.



10. Add items to the order.

    See *Adding items to orders* on page 54..

The 

button appears.

11. Press 

.

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.

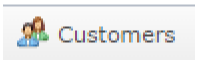
To find a customer order, search for the customer the order is for. You can either:

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

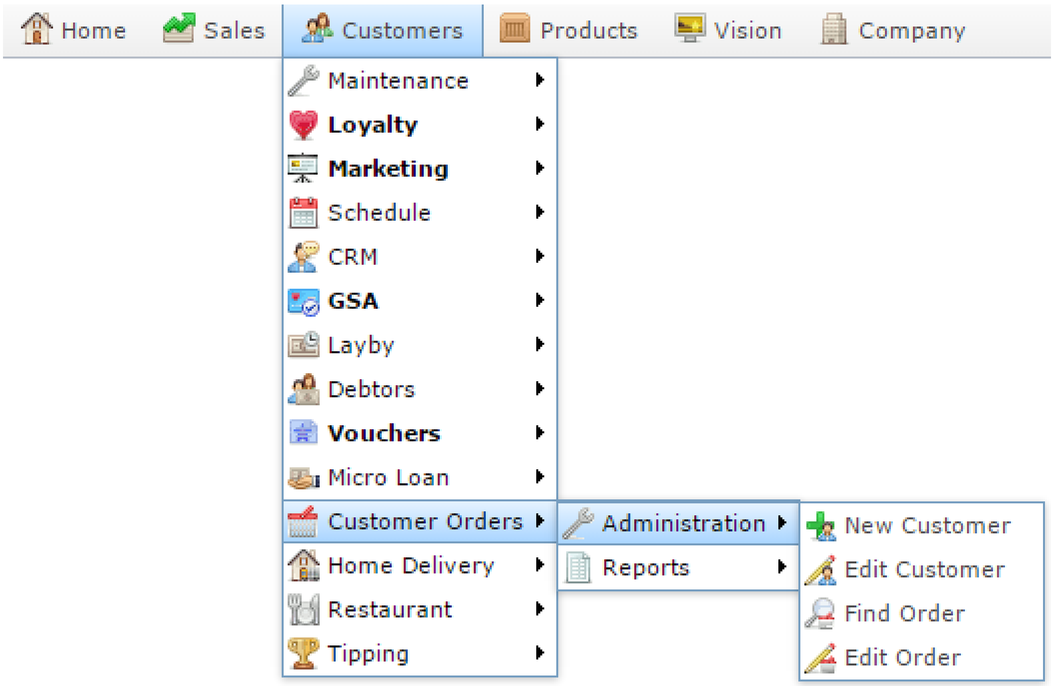
Once you have selected the customer whose order you want to open, you can choose which order you want to maintain from their Customer Orders Maintenance screen.

Opening the Find Customer Order screen

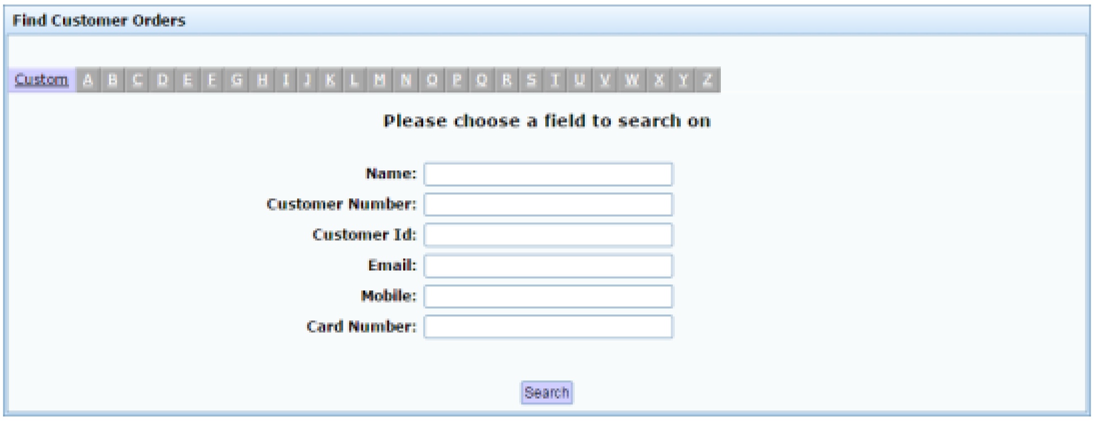
To open the Find Customer Order screen:

1. Press 

in the main menu bar.
2. Press **Customer Orders** > **Administration** > **Find Order**.



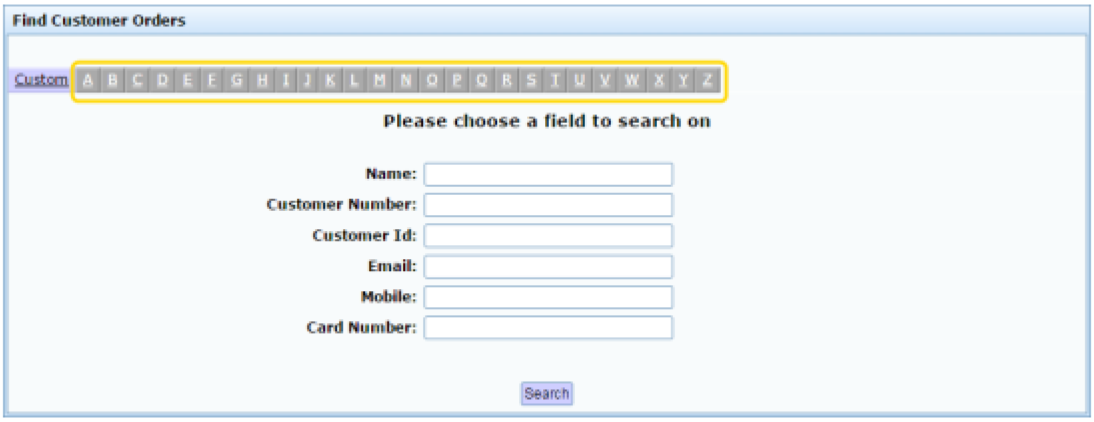
The Find Customer Orders screen is displayed.


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

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.



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

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.

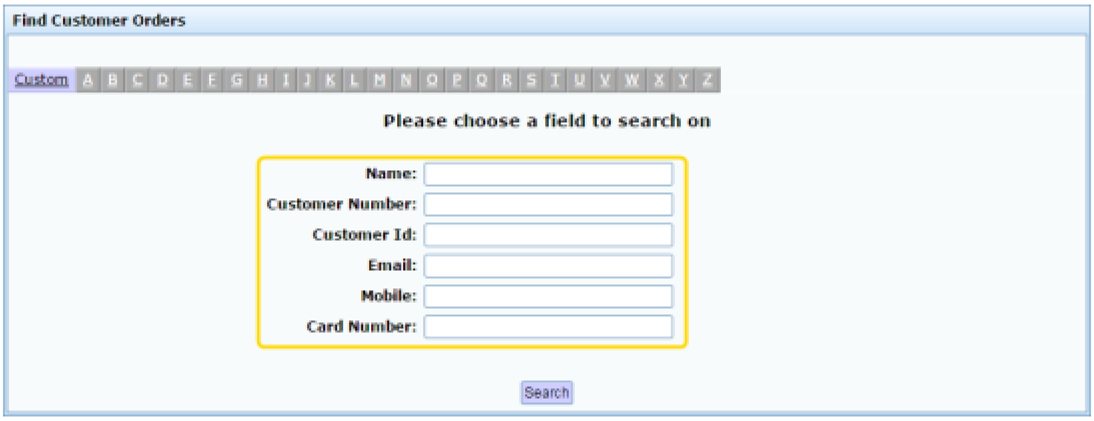
- Using the first search field that contains data.

  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.



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

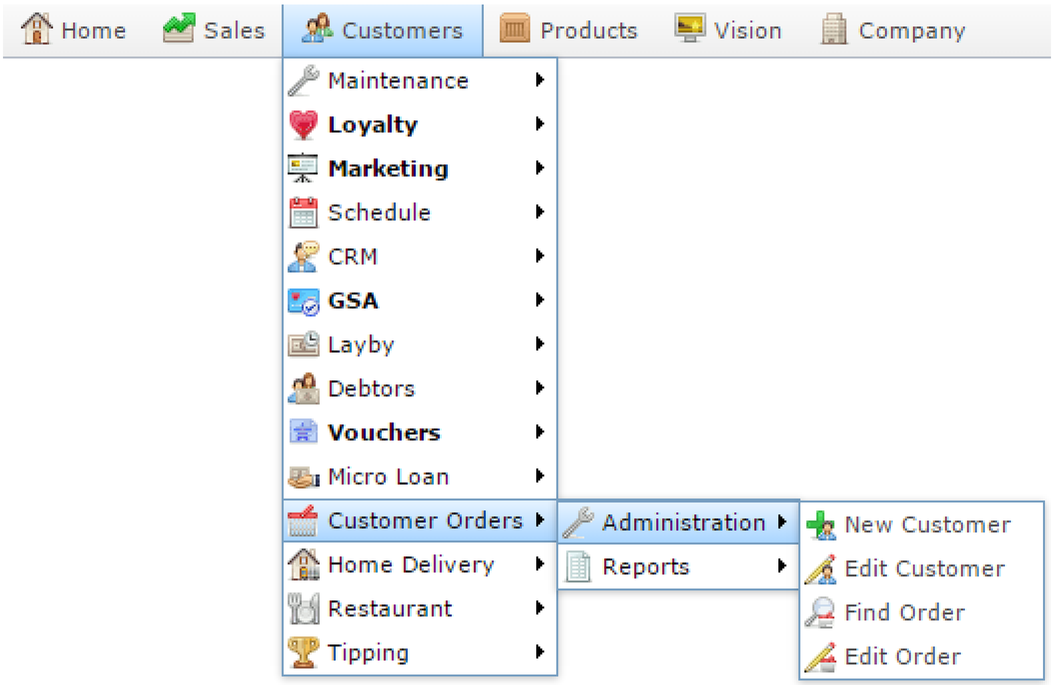
Edit a customer order to change the details or items.

Also see *Adding items to orders* on page 54.

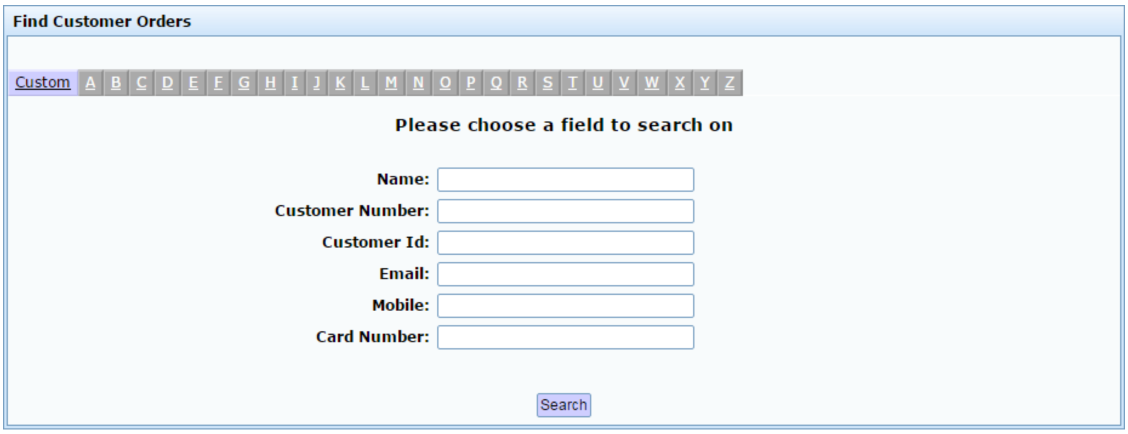
To edit a customer order:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **Edit Order**.



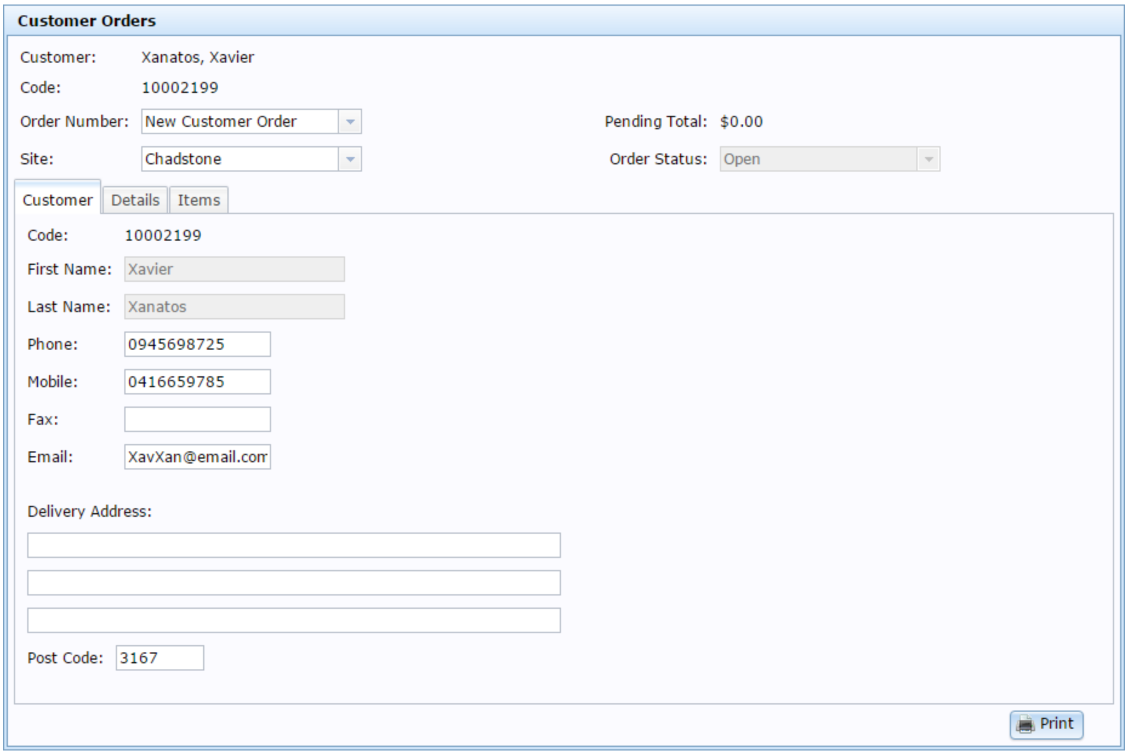
The Find Customer Order screen is displayed.



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.



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 
.

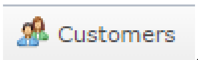
   The changes to the order are saved.

Adding items to orders

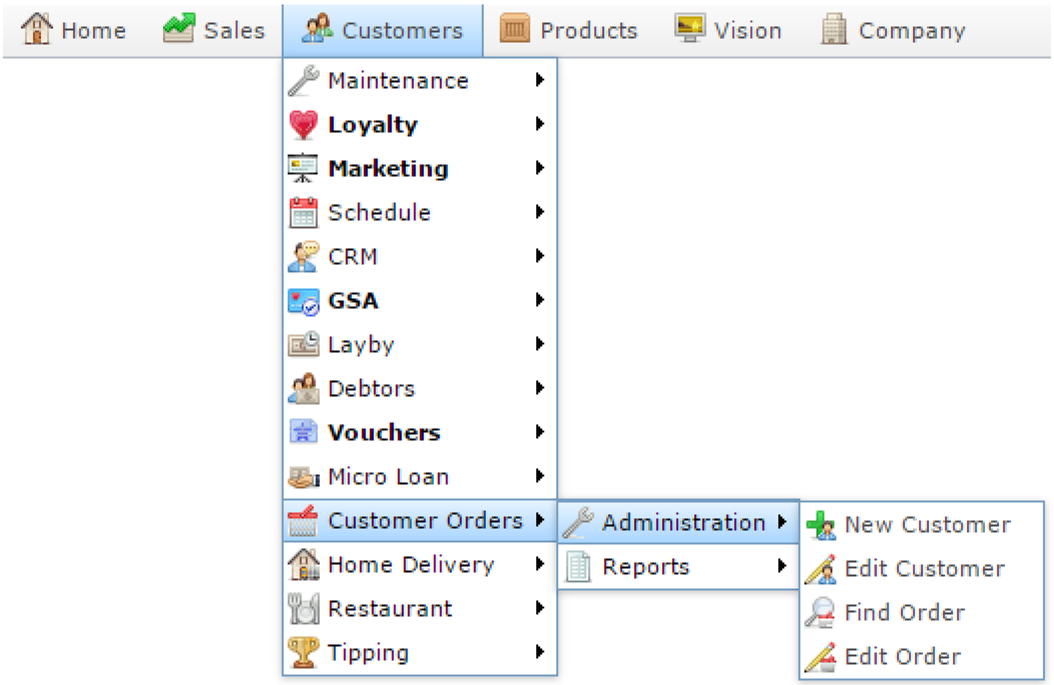
Add an item to a customer order if the customer wants to order units of this item, or you have included the item in the customer order without the customer's request, for example as a free promotional item.

> **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*.

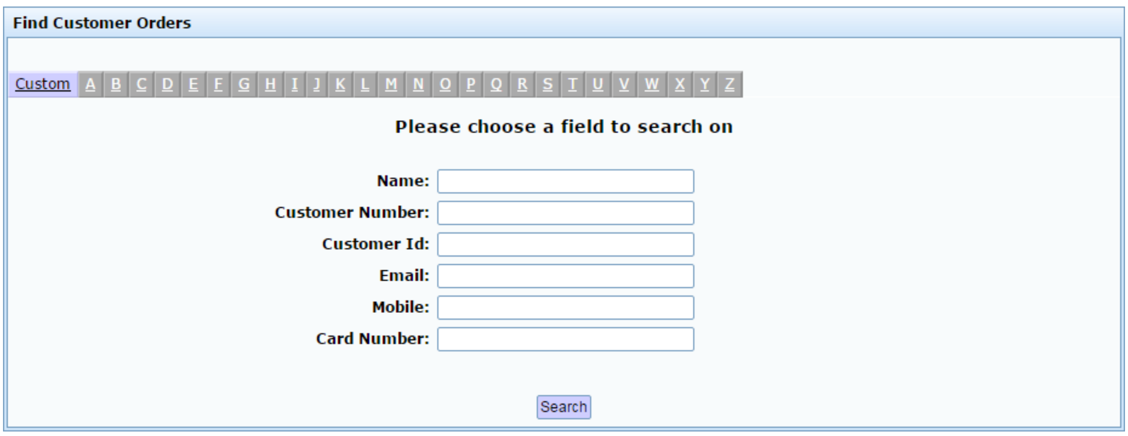
To add an item to a customer order:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **Edit Order**.



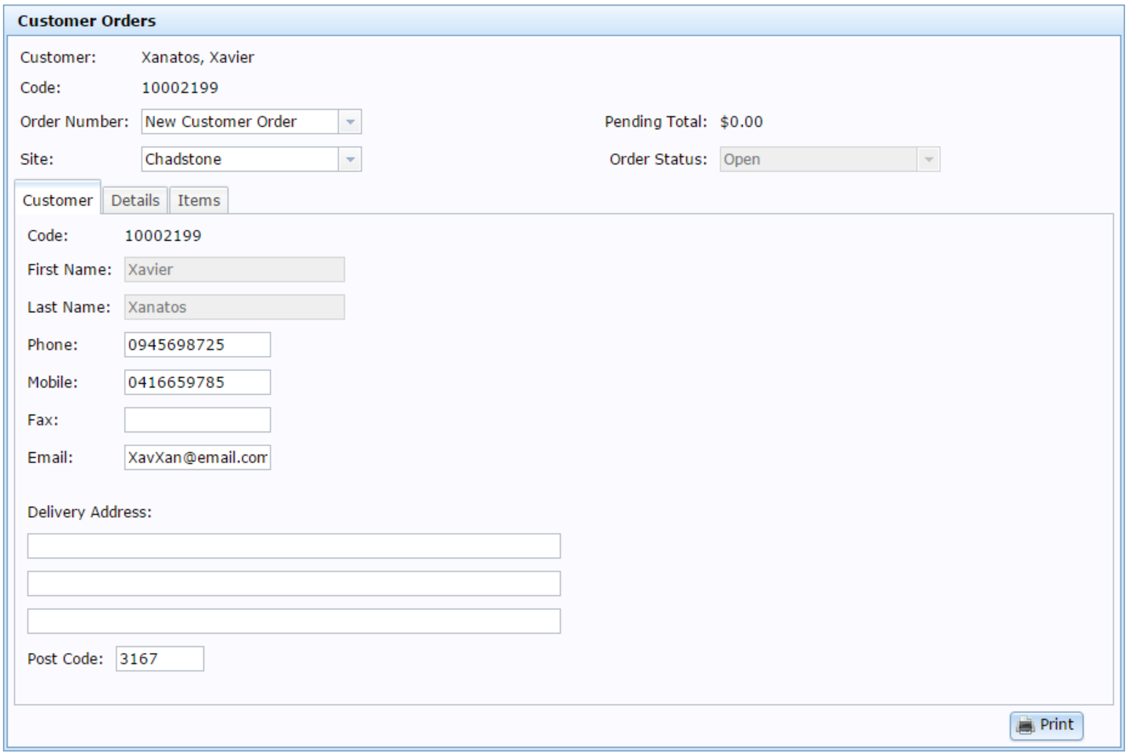
The Find Customer Order screen is displayed.



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

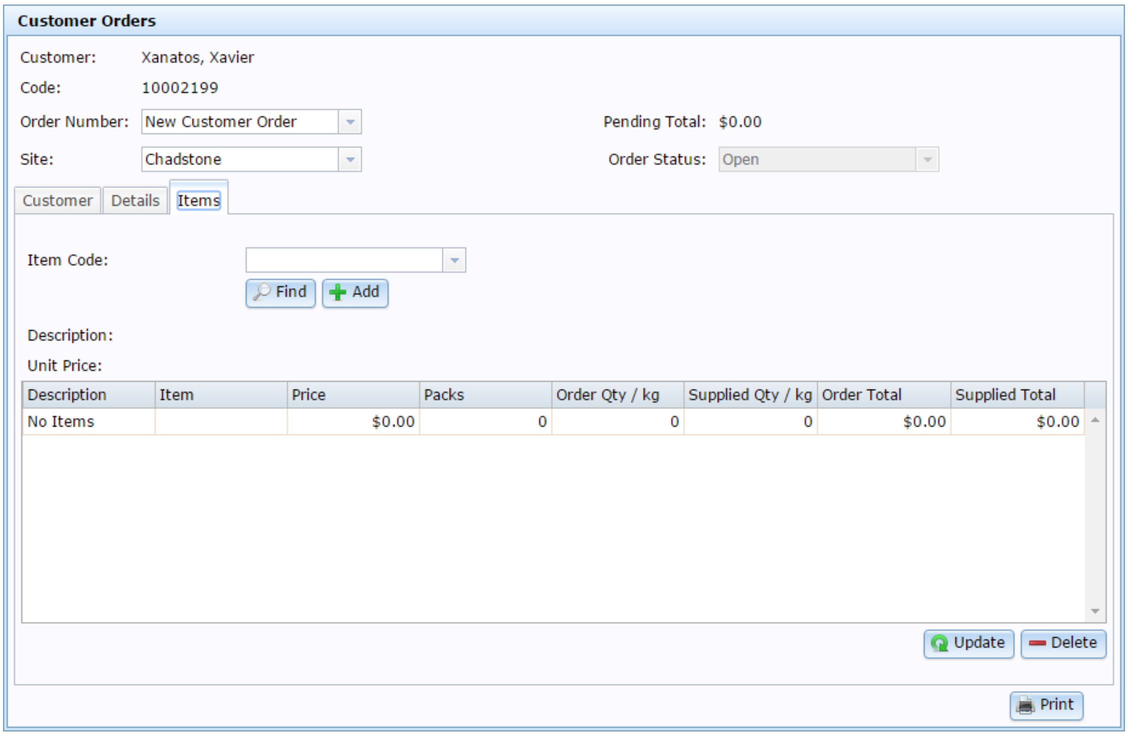
   See *Finding a customer order* on page 47.

   The Customer Order Maintenance screen is displayed.



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.



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 
.

   The item is added to the order.

8. Press 
.

   The changes to the order are saved.

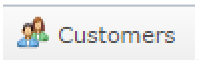
Editing items in orders

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

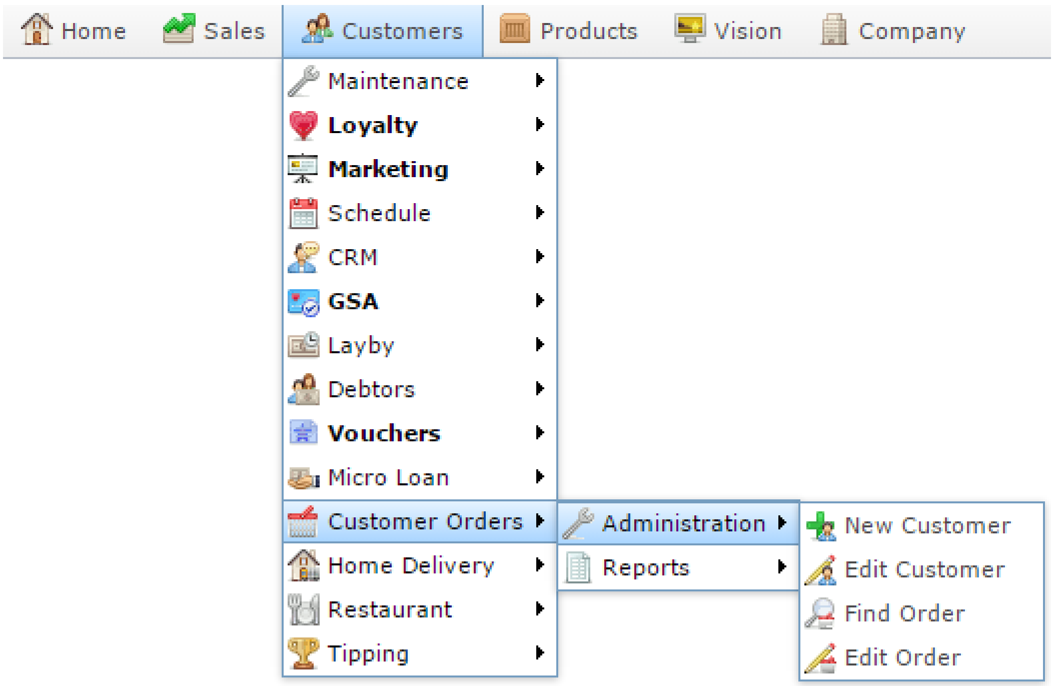
Tip: If you can not supply all items in an order, you can configure the Portal to automatically create backorders for unsupplied items. See the **Enable Backorders** field in the Customer Orders section of Site Options. See *Configuring Customer Orders for your site*

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*.

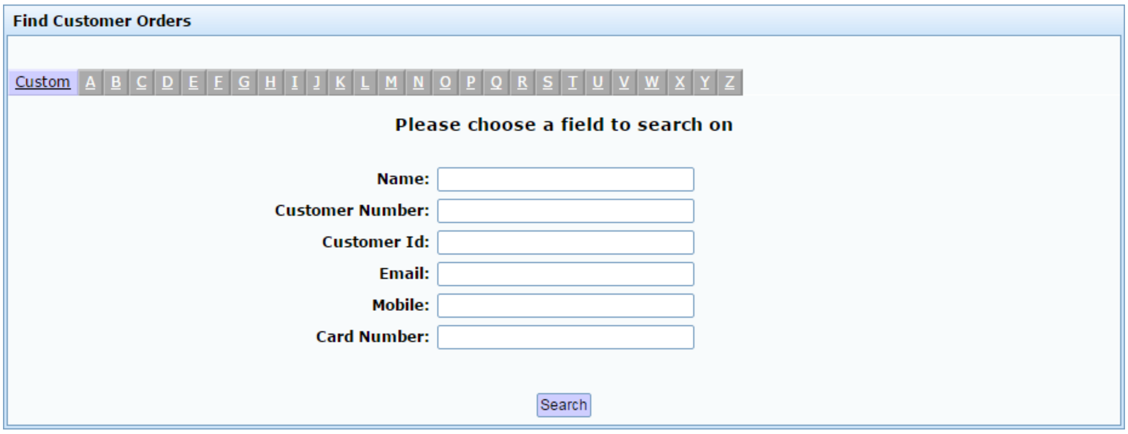
To edit an item in a customer order:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **Edit Order**.



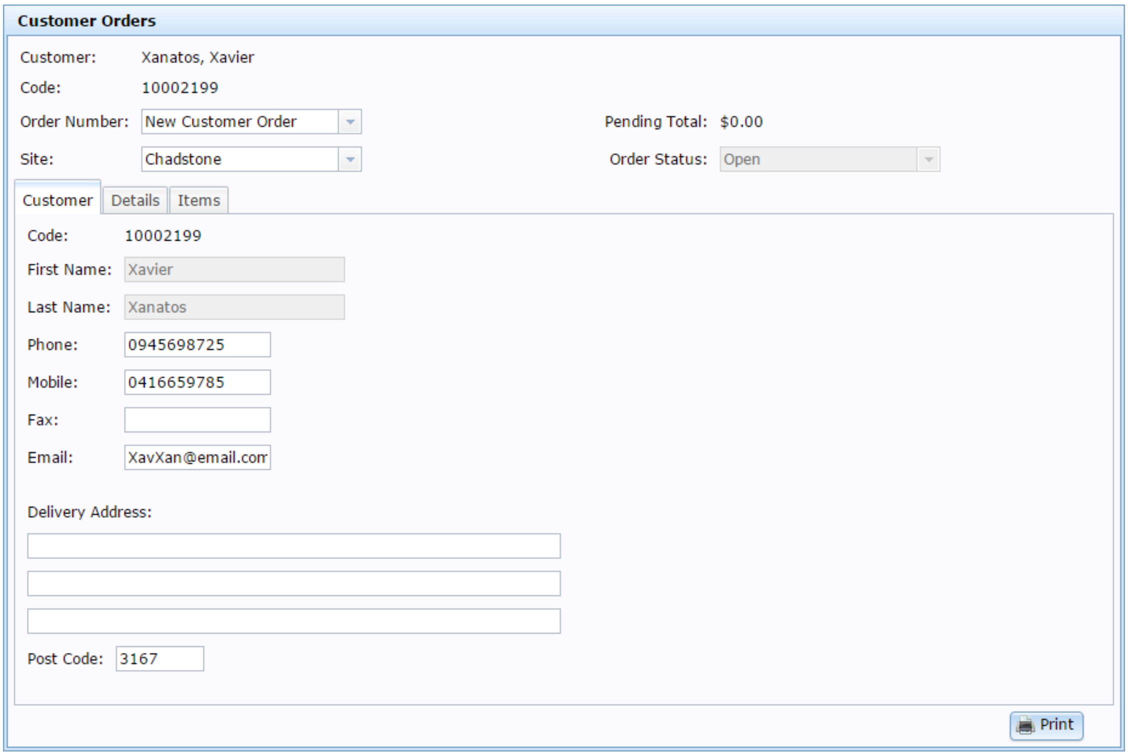
The Find Customer Orders screen is displayed.



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

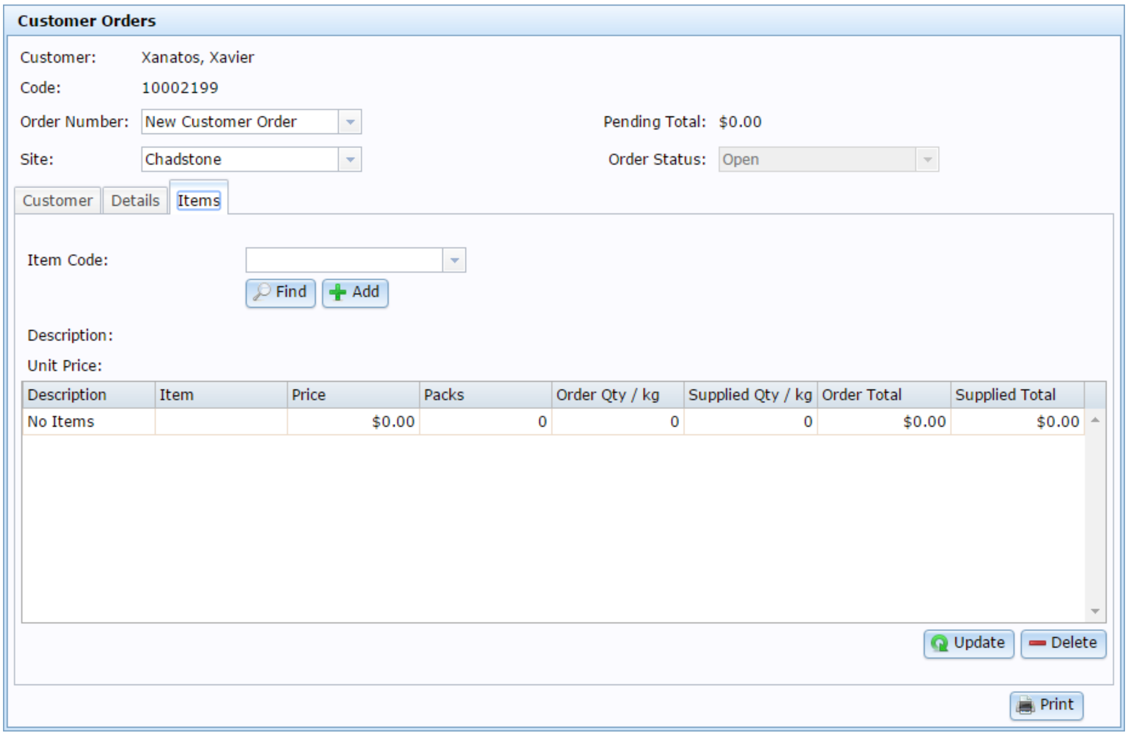
   See *Finding a customer order* on page 47.

   The Customer Orders screen is displayed.

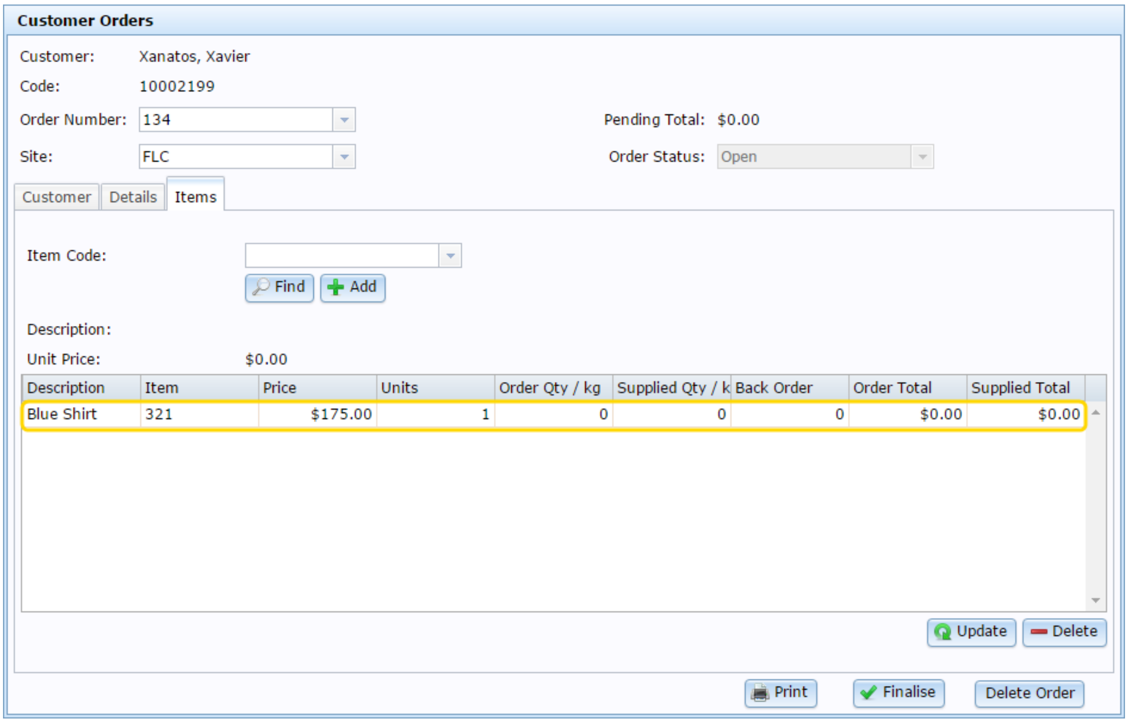


4. Select the order number you want to edit in the **Order Number** drop-down field.
5. Press the Items tab.

   The Items tab is displayed.

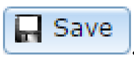


6. Select the item in the grid you want to remove.



7. Edit the field you want to change.

   See *Customer Orders screen* on page 68.

8. Press 

.

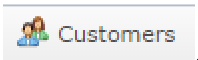
   The changes to the order are saved.

Removing items from orders

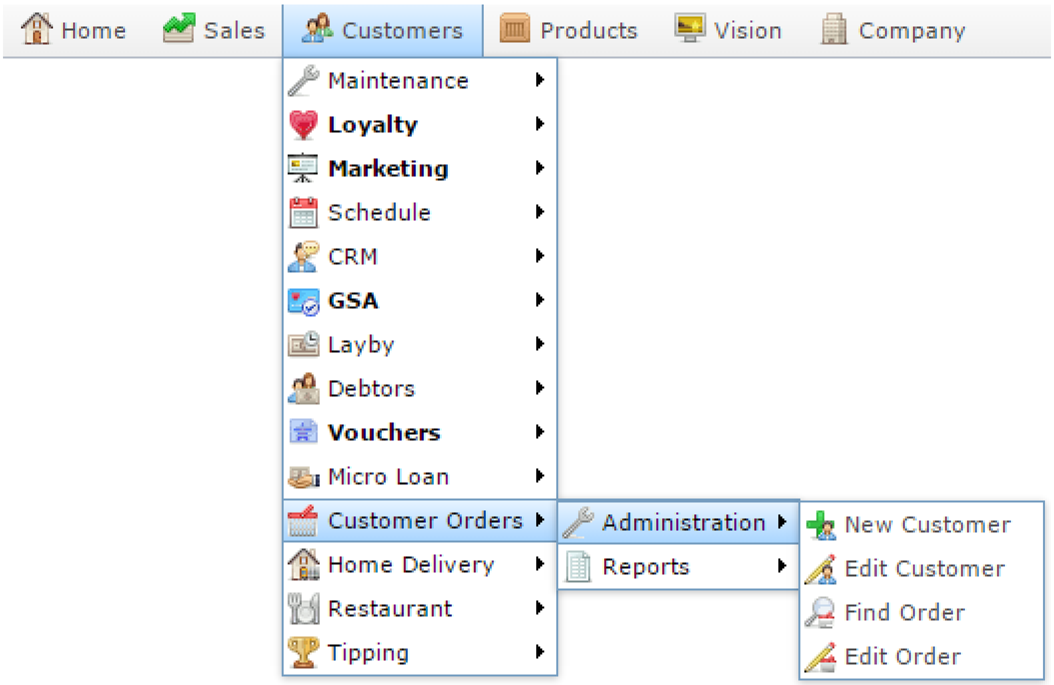
Remove an item from a customer order if the customer no longer wants the item, or you are creating a backorder.

> **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.

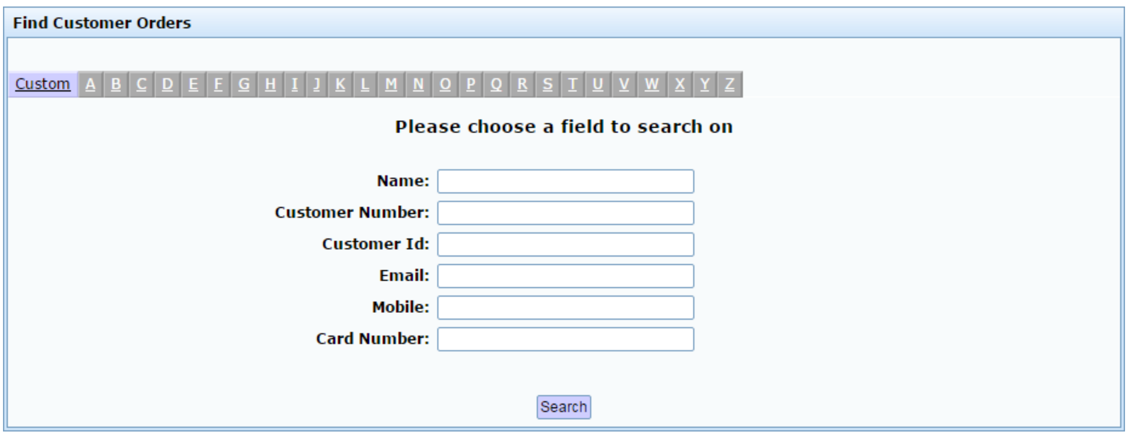
To remove an item from a customer order:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **Edit Order**.



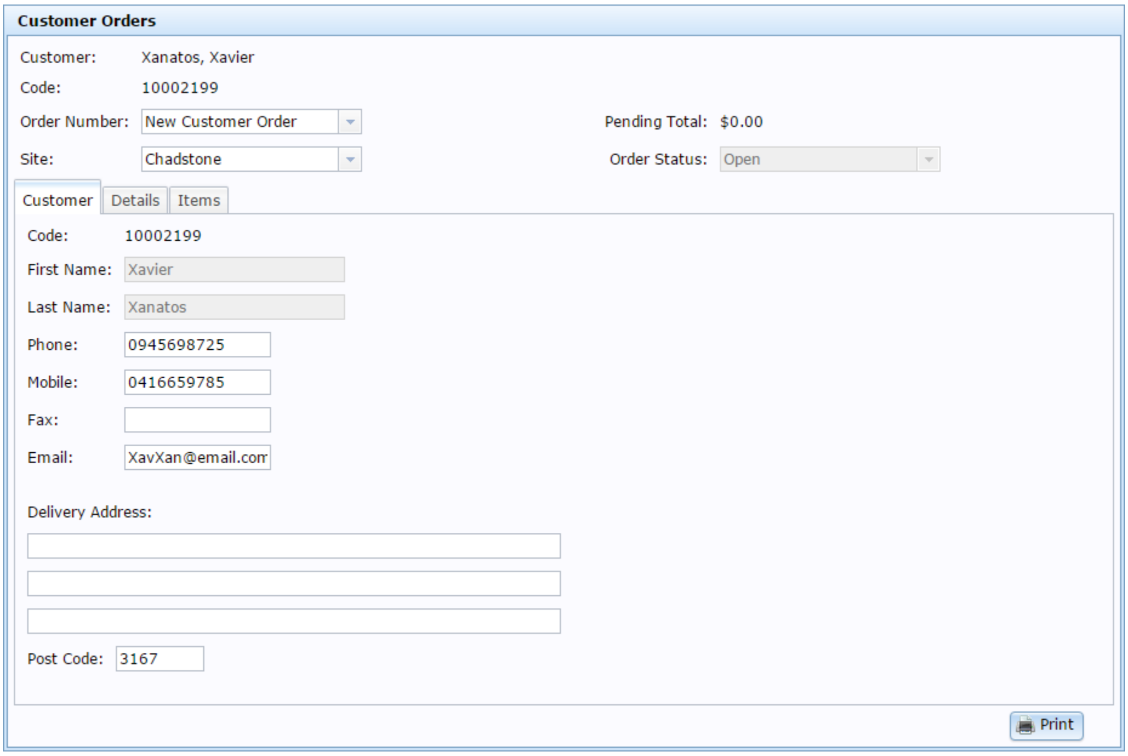
The Find Customer Orders screen is displayed.



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

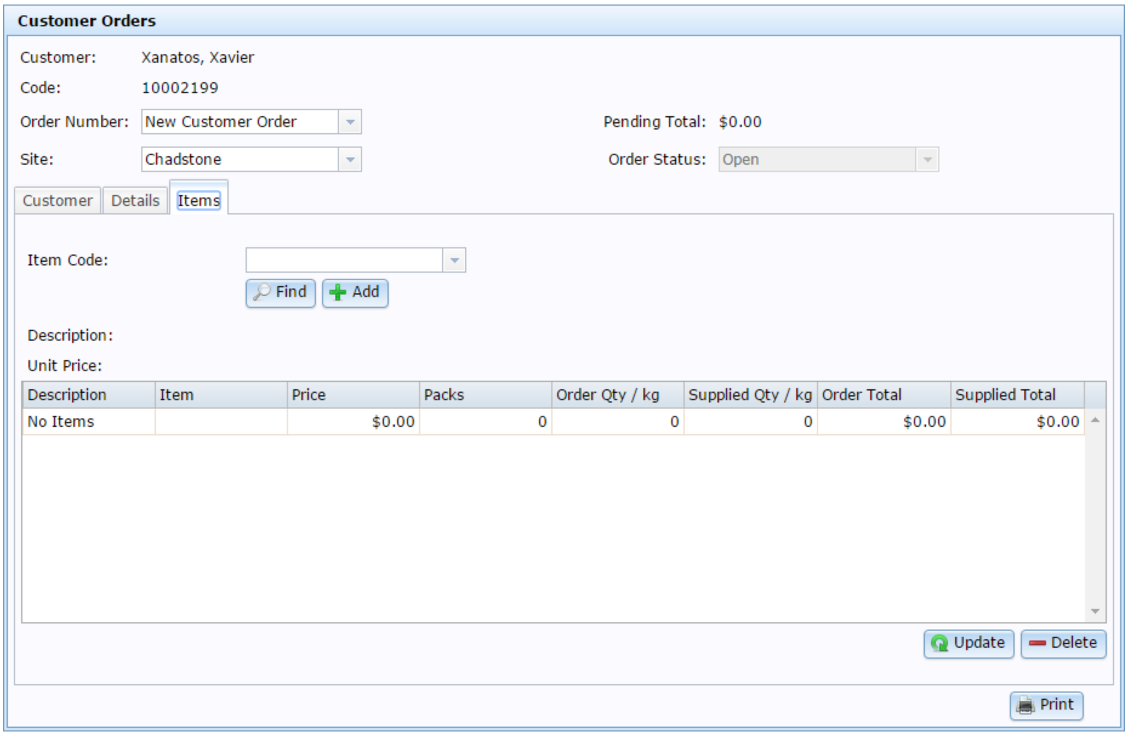
   See *Finding a customer order* on page 47.

   The Customer Orders screen is displayed.

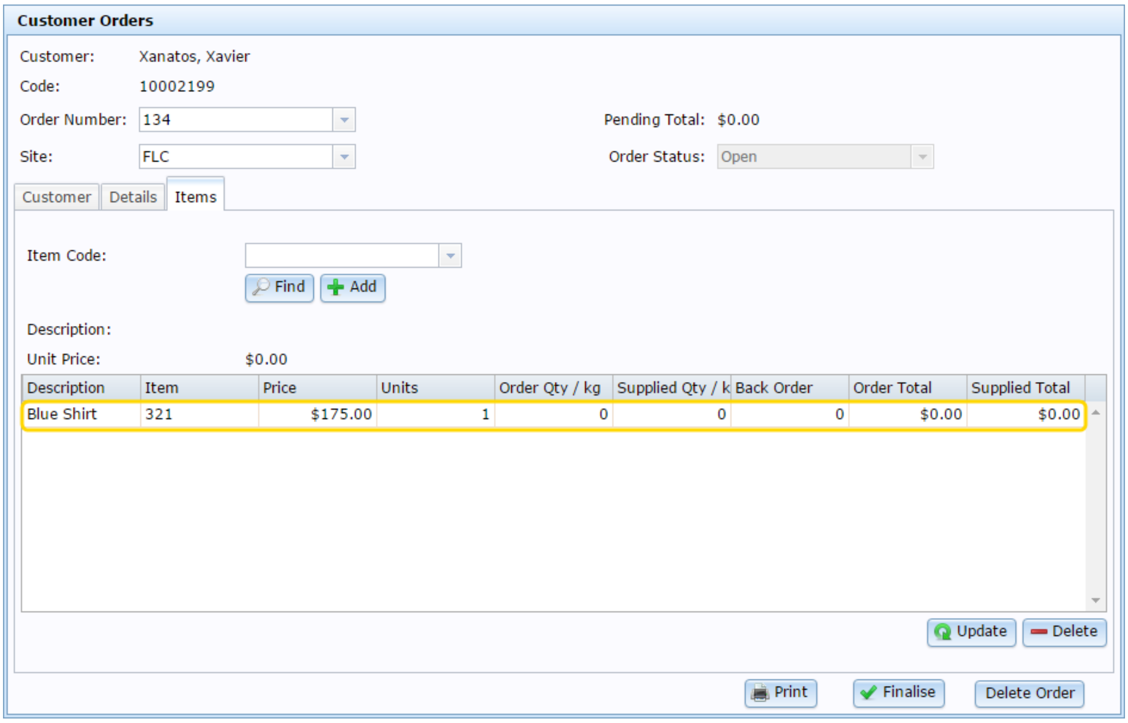


4. Select the order number you want to edit in the **Order Number** drop-down field.
5. Press the Items tab.

   The Items tab is displayed.



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



7. Press Delete.

   The item is removed.

8. Press Save.

The changes to the order are saved.

Finalising a customer order

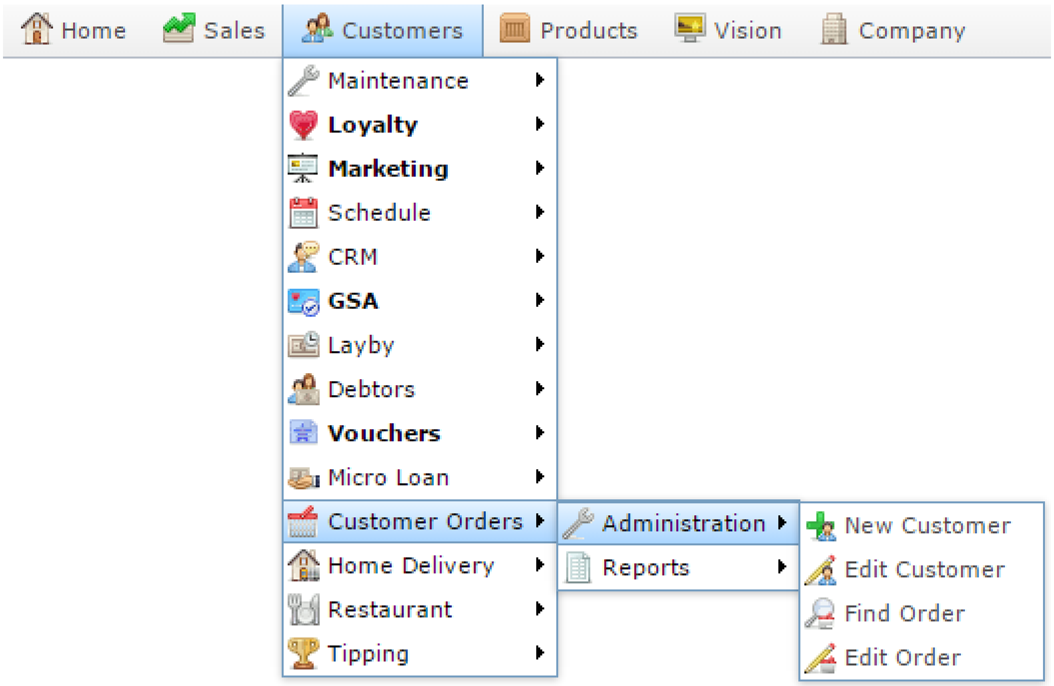
Finalise a customer order to complete the order. Changes cannot be made to a finalised order.

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

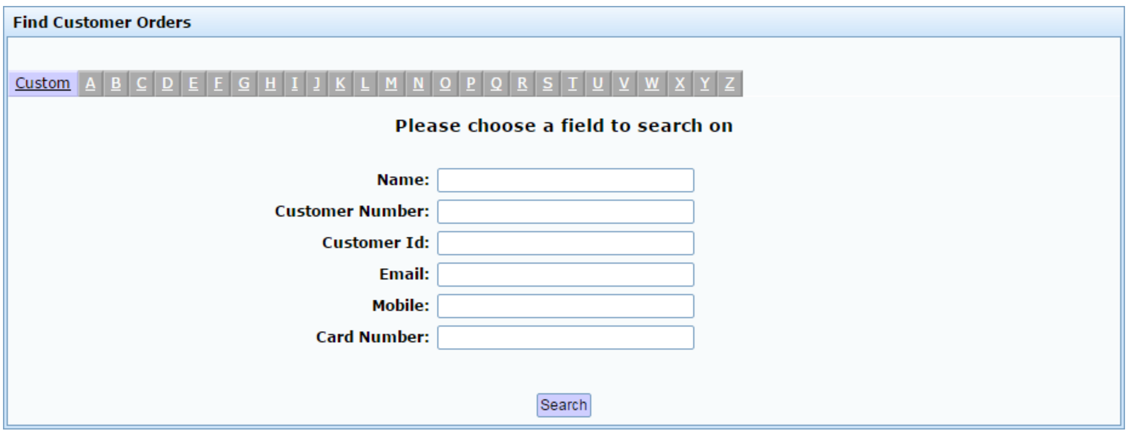
To finalise a customer order:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **Edit Order**.



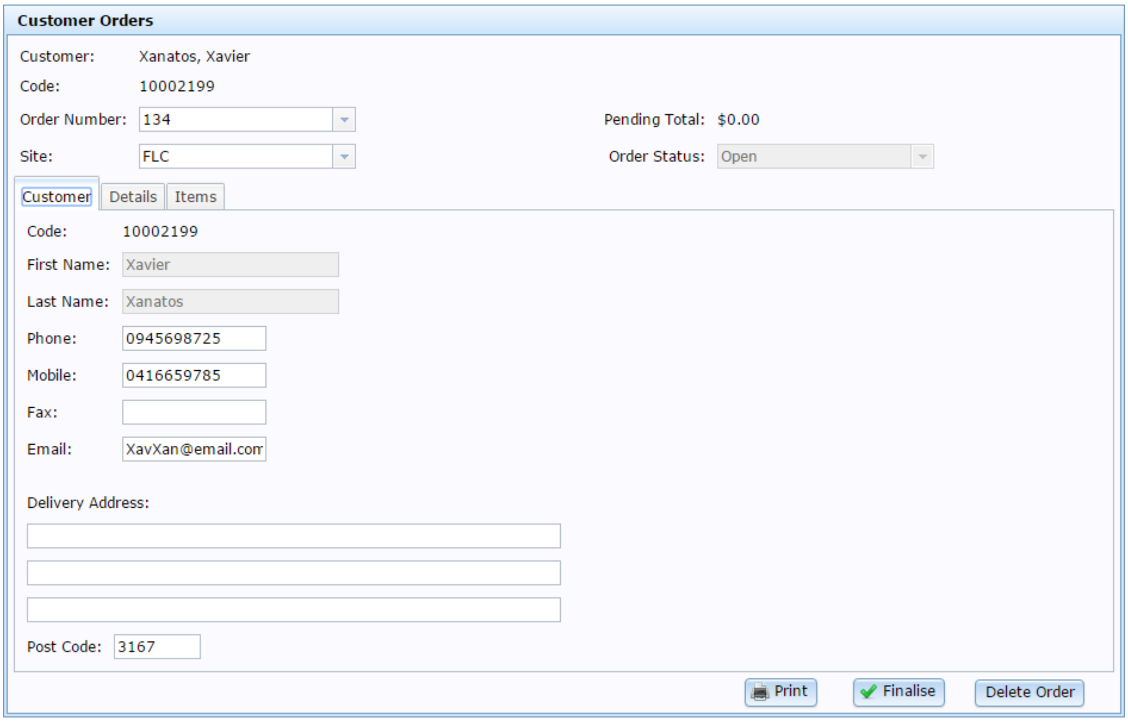
The Find Customer Order screen is displayed.



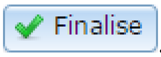
3. Search for the customer you want to view or edit orders for.

   See *Finding a customer order* on page 47.

   The Customer Orders screen is displayed.



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

5. Press 

.

   The order is finalised.

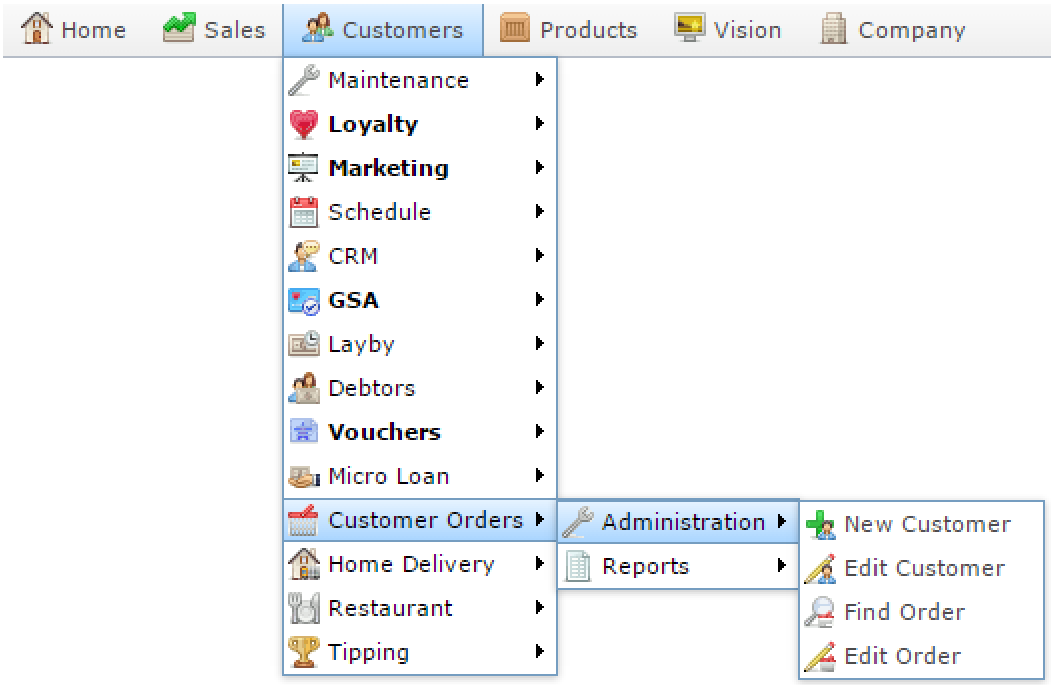
Deleting a customer order

Delete a customer order to cancel the order.

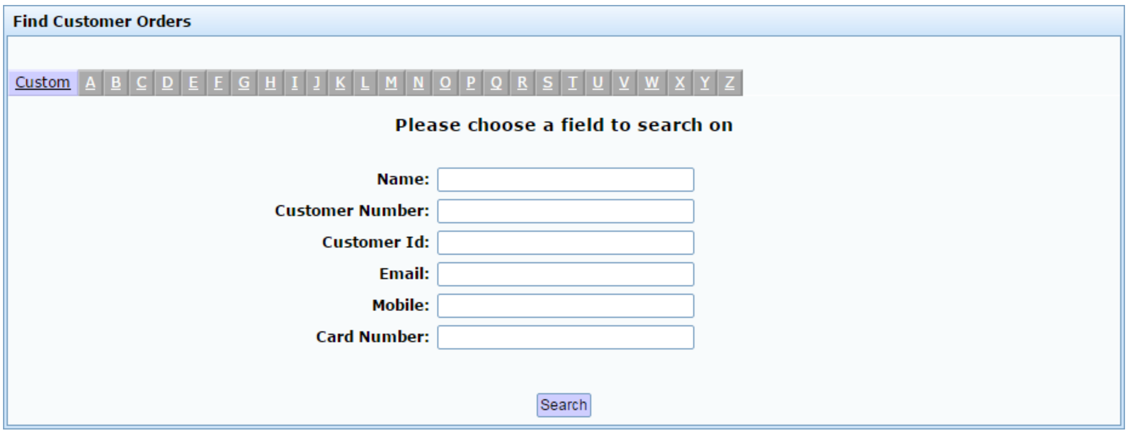
To delete a customer order:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **Edit Order**.



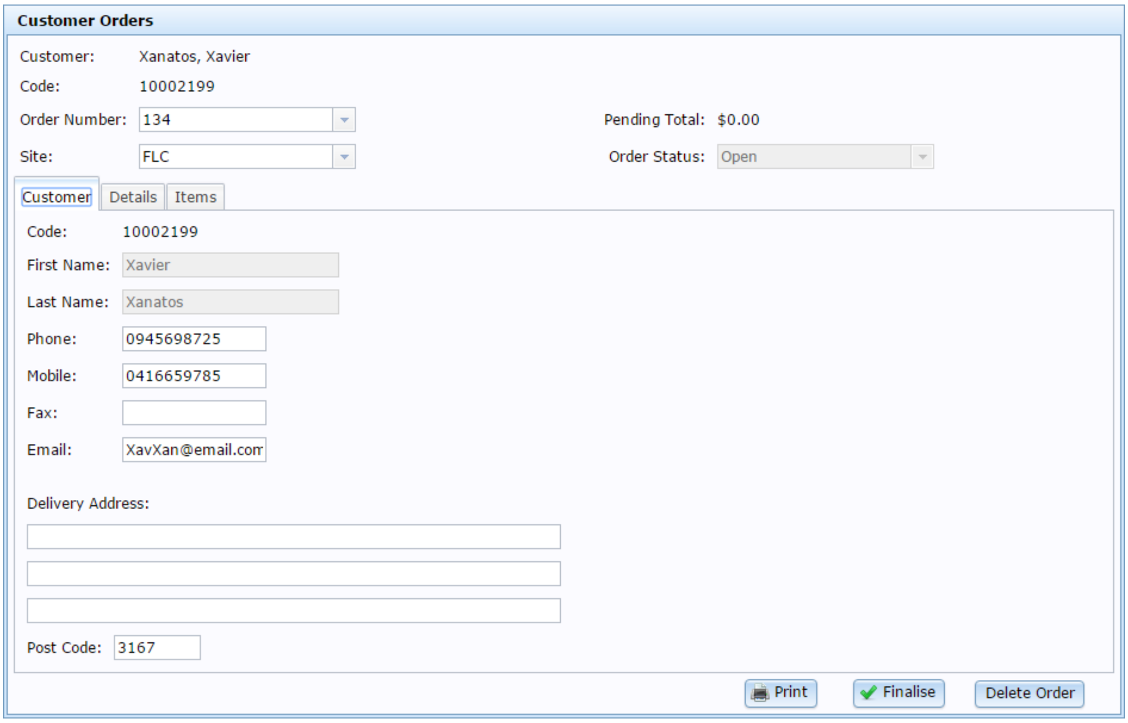
The Find Customer Orders screen is displayed.



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.



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

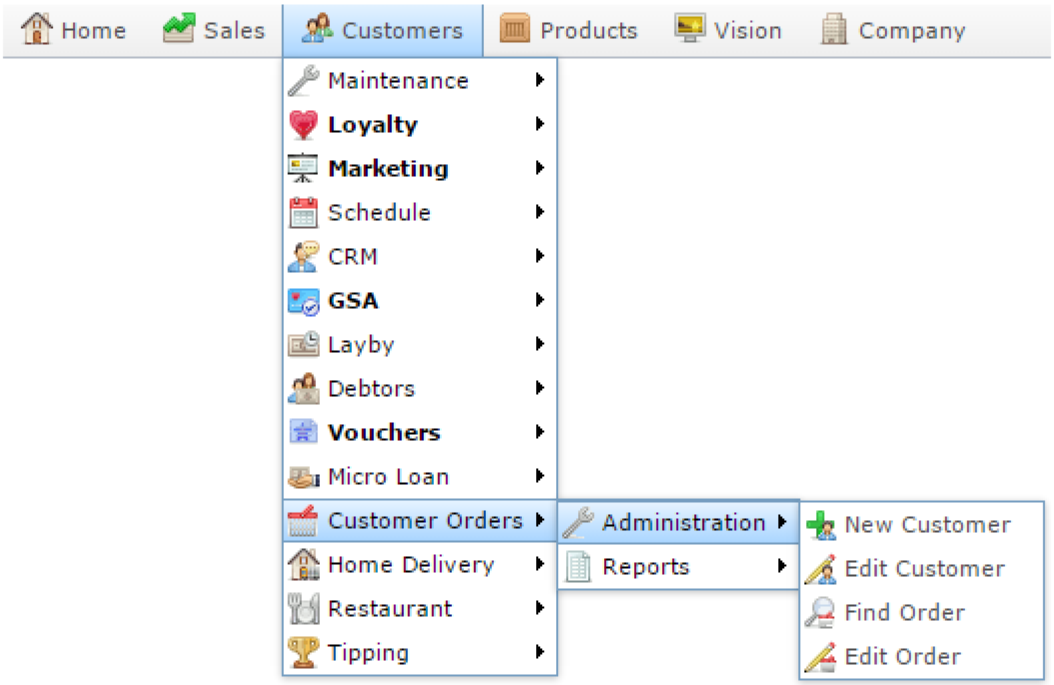
Use this screen to view or maintain customer orders.

Opening the Customer Orders screen

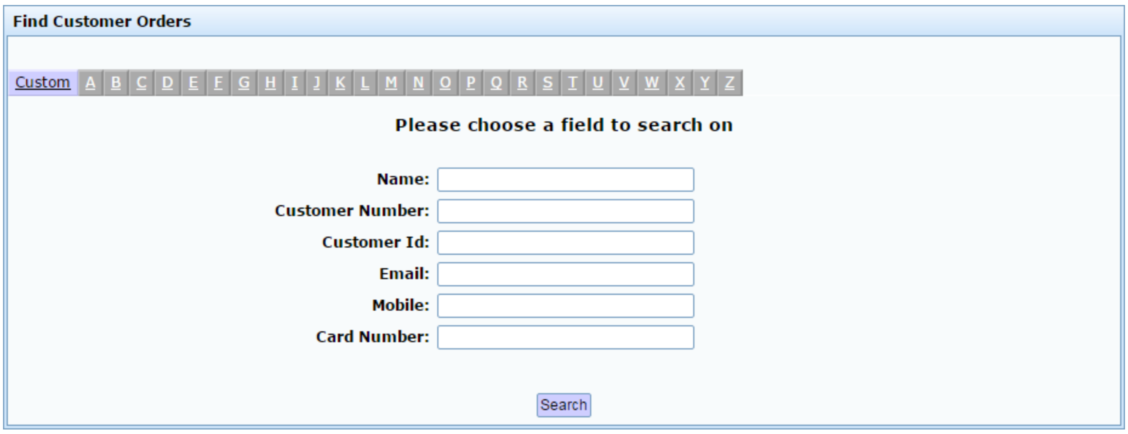
To open the Customer Orders screen:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **Edit Order**.



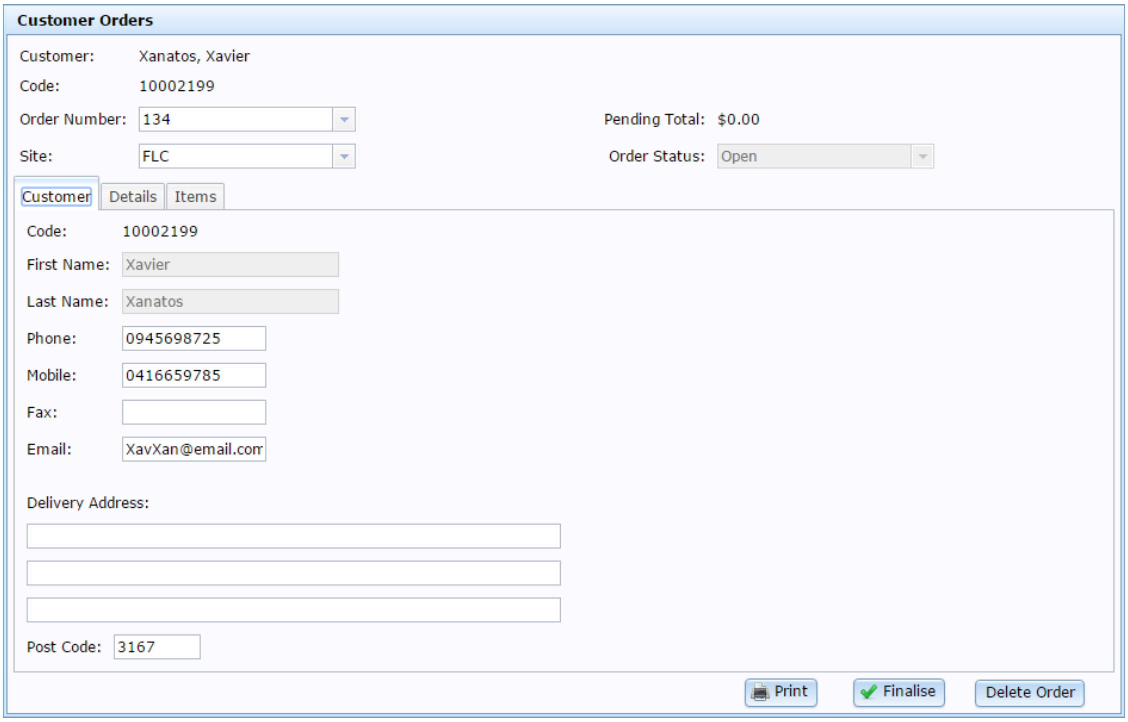
The Find Customer Orders screen is displayed.



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.



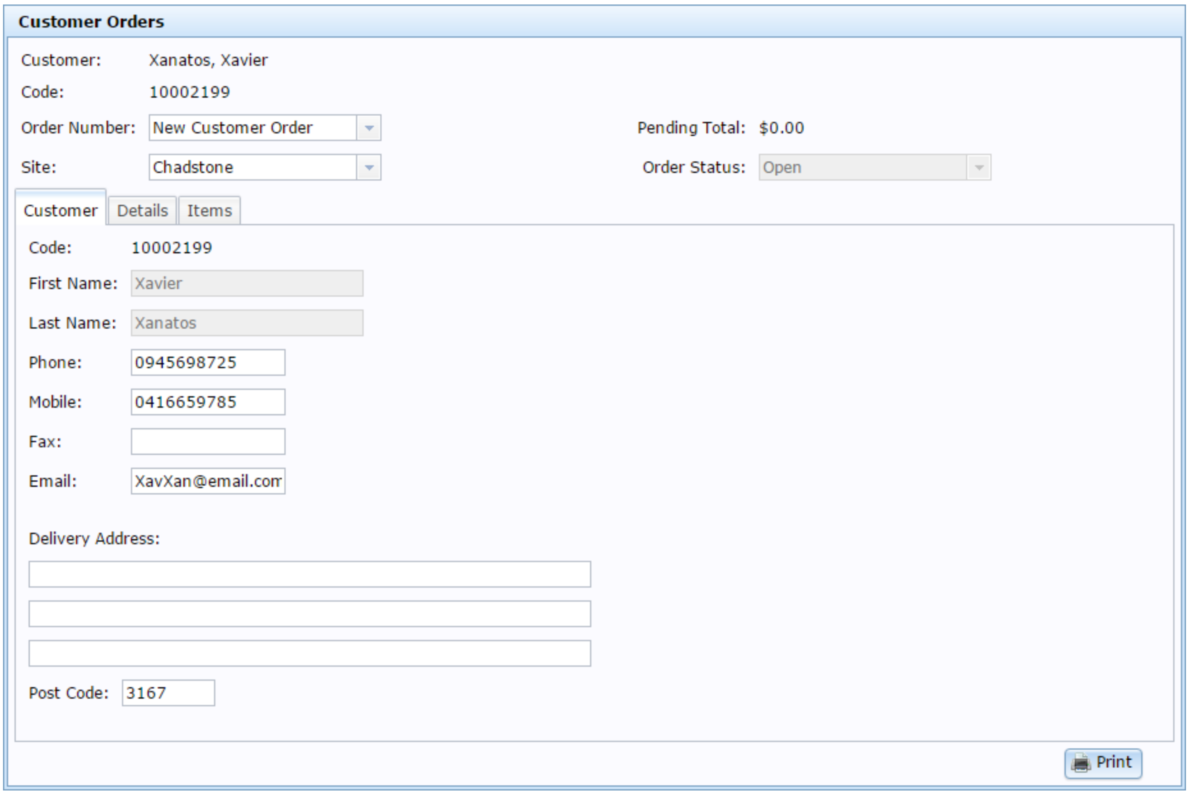
Customer Orders screen key fields and buttons

Common fields and buttons

Field	Description
Customer	Customer's name.
Code	The customer's unique code.
Order Number	Select the order to view, or **New Customer Order** 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.
Print	Press to print the customer order.
Finalise	Press to finalise the customer order.
Delete Order	Press to delete the customer order.

Customer tab

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

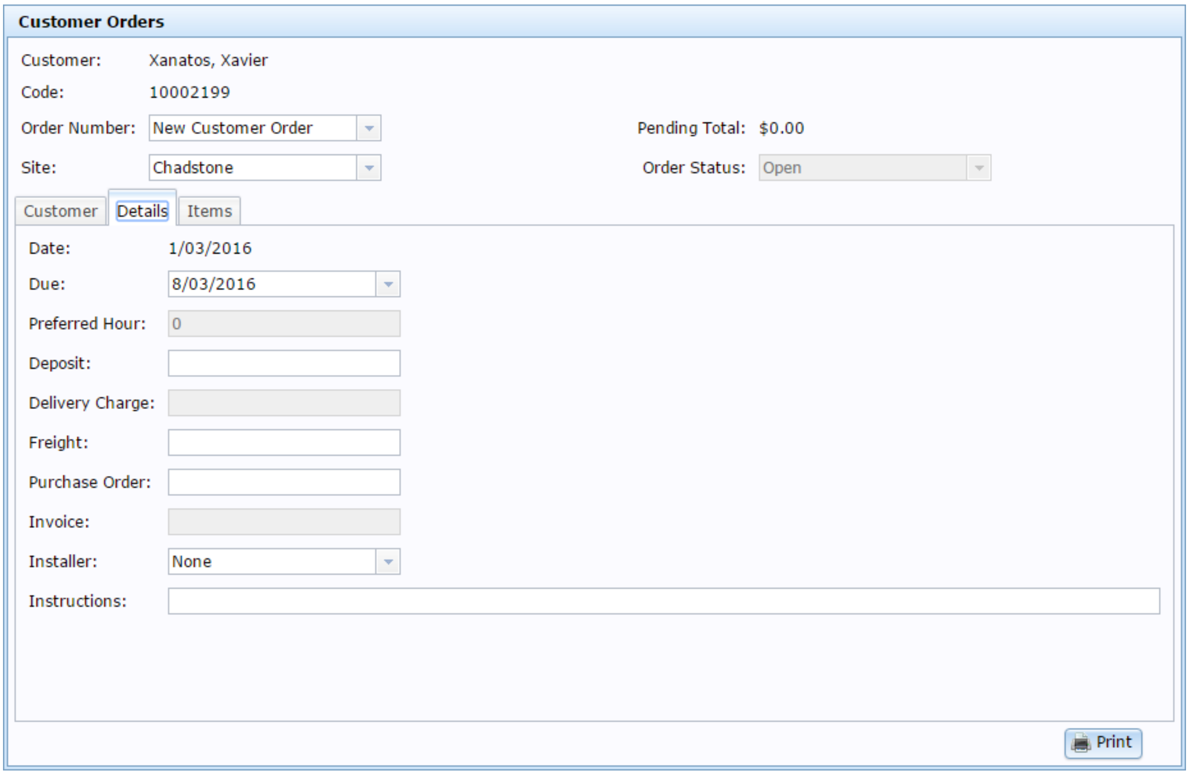


Field	Description
Code	Unique code that identifies the customer.
First Name	The customer's first name.
Last Name	The customer's last name.
Phone	The customer's phone number.
Mobile	The customer's mobile number.
Fax	The customer's fax number.

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.

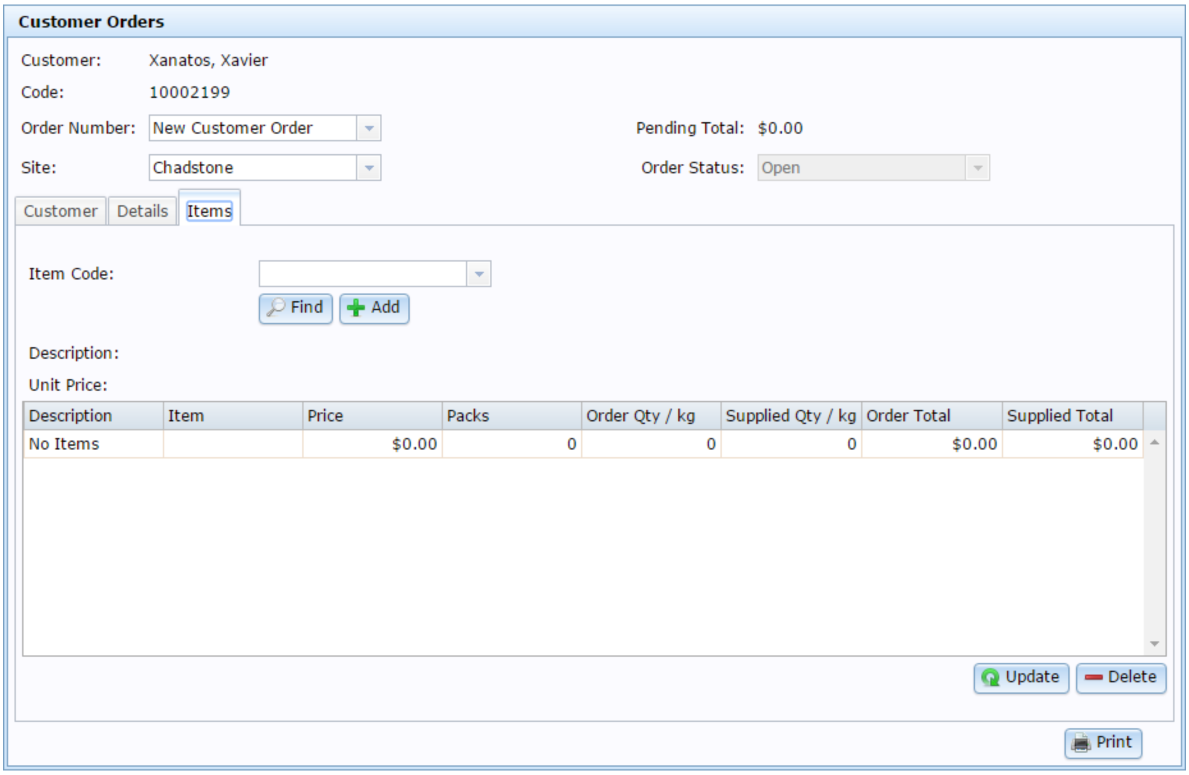


Field	Description
Date	Date the order was created.
Due	Date the order is due to be delivered.
Preferred Hour	Preferred time of day for the order delivery.
Deposit	Deposit the customer paid for the order.
Delivery Charge	Delivery charges added to the order.

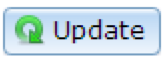
Field	Description
Freight	Freight charge for the order.
Purchase Order	Purchase order number for the related purchase order.
Invoice	Invoice number for the related invoice.
Installer	Select the person to install the product if required.
Instructions	Any delivery instructions from the customer.

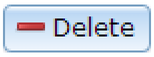
Items tab

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 *Finding an item with a search field*.
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. **Note:** This field is only displayed if **Enable Units** is set to **False** in the Customer Orders section of Site Options. See *Configuring Customer Orders for your site*
Units	Number of units ordered. The Portal automatically calculates the correct weight or number of packs. **Note:** This field is only displayed if **Enable Units** is set to **True**in the Customer Orders section of Site Options. See *Configuring Customer Orders for your site*
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. **Note:** 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 **Enable Backorder** field in the Customer Orders section of Site Options. See *Configuring Customer Orders for your site*.
Order Total	Total price of all units of the item ordered.
Supplied Total	Total price of all units of the item supplied.
	Press to save any changes to the item list.

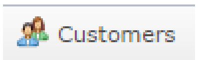
Field	Description
	Press to remove the selected item from the item list.

Customer Order report

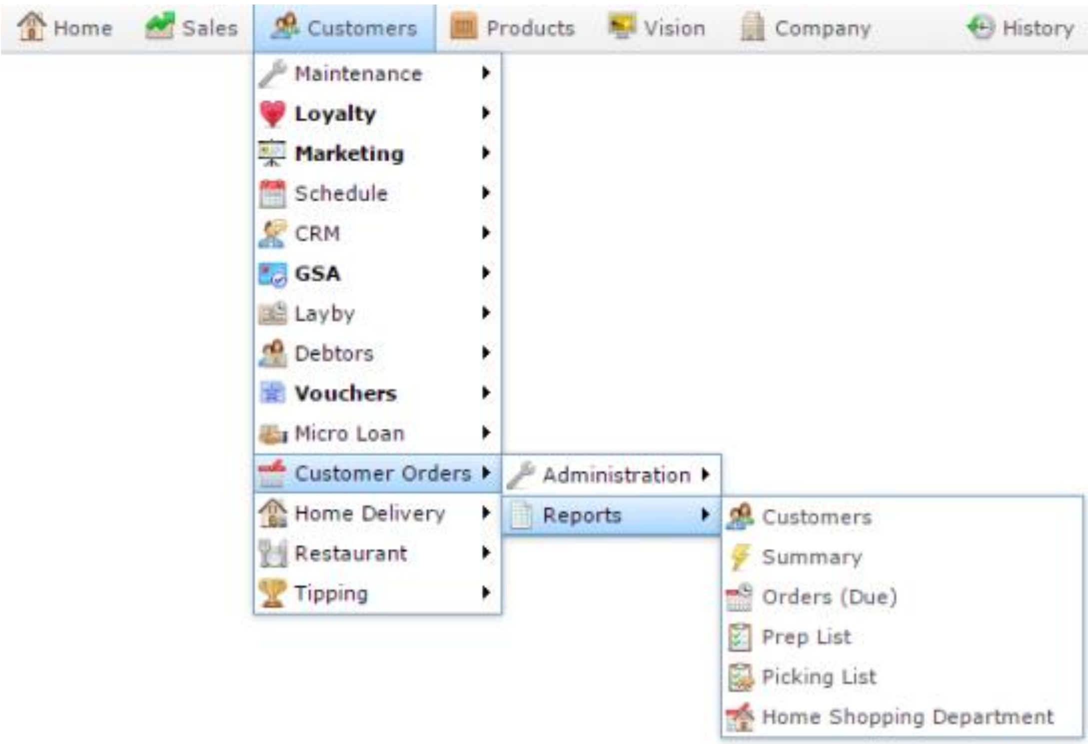
Use the Customer Order report to view customer orders details.

Opening the Customer Order report

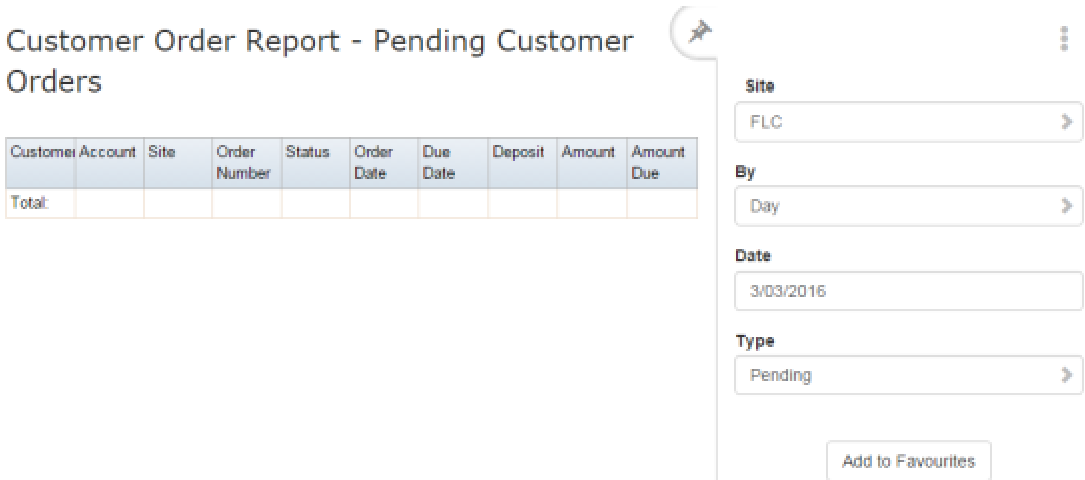
To open the Customer Order report:

1. Press 

from the menu bar.
2. Press **Customer Orders** > **Reports** > **Orders (Due)**.



The Customer Order report is displayed.



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.
Type	Select to filter the report to customer's orders that are: ▪ Pending. ▪ Finalised. ▪ Delivered. ▪ All customer orders.

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 / **Customer /** **Customer Name /** **Debtor**	Name of the debtor or customer.
Debtor Code/ **Customer Code /** **Number /** **Account**	Unique code identifying the debtor.
Customer / Details	Customer name and details.
Order # / **Order Number /** **Order**	Code identifying the 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

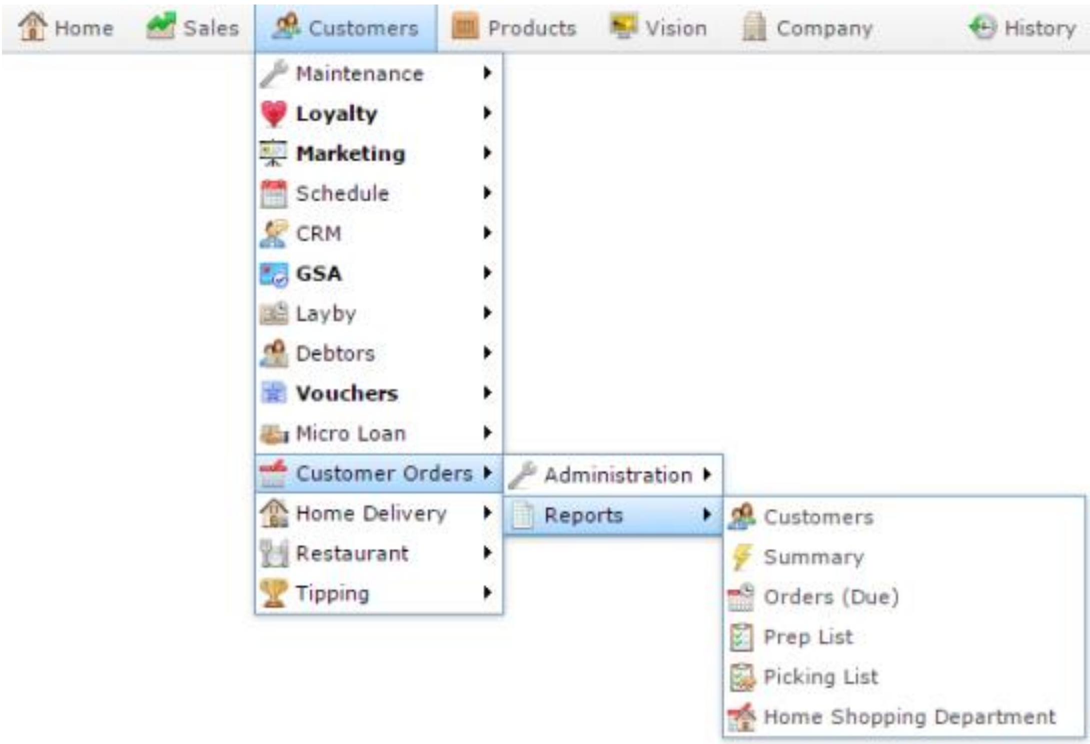
Use the Customer Order Summary report to view customer orders by time period.

Opening the Customer Order Summary report

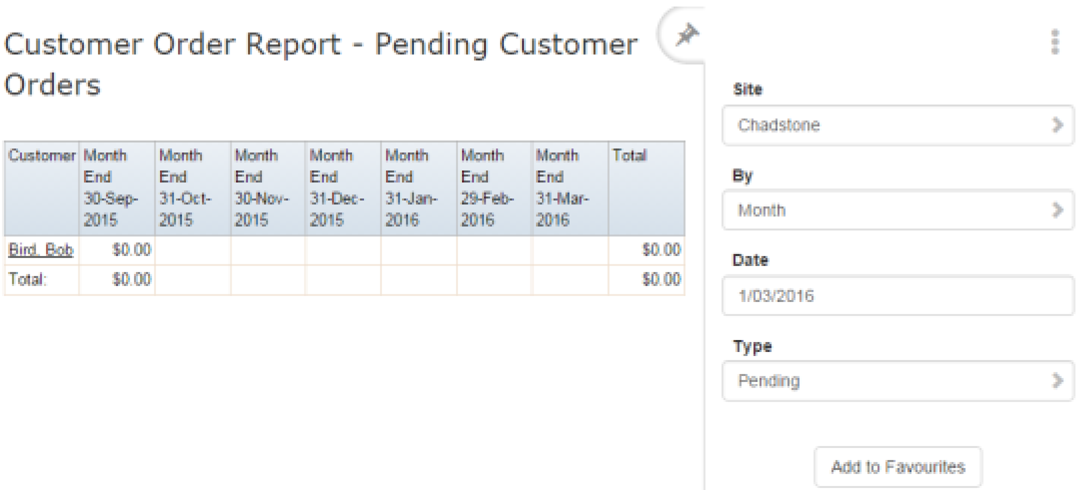
To open the Customer Order Summary report:

1. Press 

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



The Customer Order Summary report is displayed.



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.
By	Select to display the report for a specific day, week, month or a period specified between two dates. **Note:** 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.
Type	Select to filter the report to customer's orders that are: ▪ Pending. ▪ Finalised. ▪ Delivered. ▪ All customer orders.

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

Picking List report

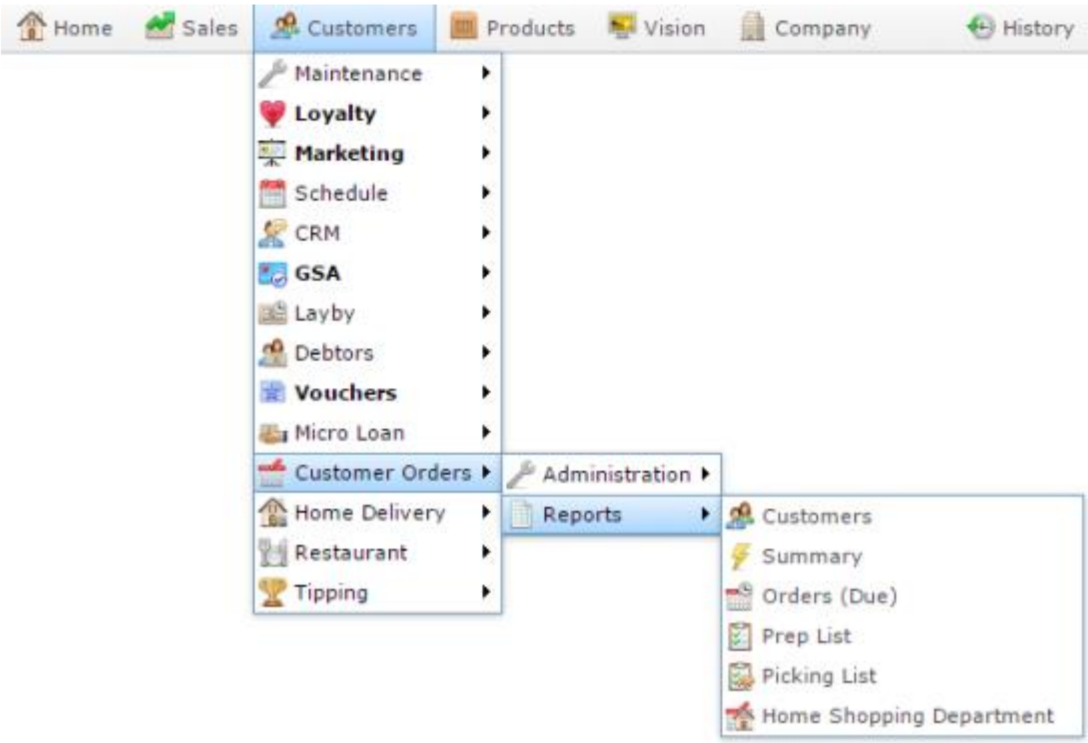
Use the Picking List report to view the list of items that need to be placed into customer orders.

Opening the Picking List report

To open the Picking List report:

1. Press 

from the menu bar.
2. Press **Customer Orders** > **Reports** > **Picking List**.



The Picking List report is displayed.

Customer Order Picking Report - From 30 Mar 2003 to 30 Mar 2016 inclusive

Item	Description	Order	Qty/Kg	Packs	Price	Total
1	Chicken Breast	36	0.0	1	$7.99	$0.00
Total			0.0			$0.00
189	Argies Of Beef	11	50.0	1	$7.50	$375.00
Total			50.0			$375.00
3	Chicken Brocolli & 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

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 / **Sites**	Select the site or sites to report on.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.
Type	Select to filter the report to customer's orders that are: ▪ Pending. ▪ Finalised. ▪ Delivered. ▪ All customer orders.
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**	Description of the item. **Note:** 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

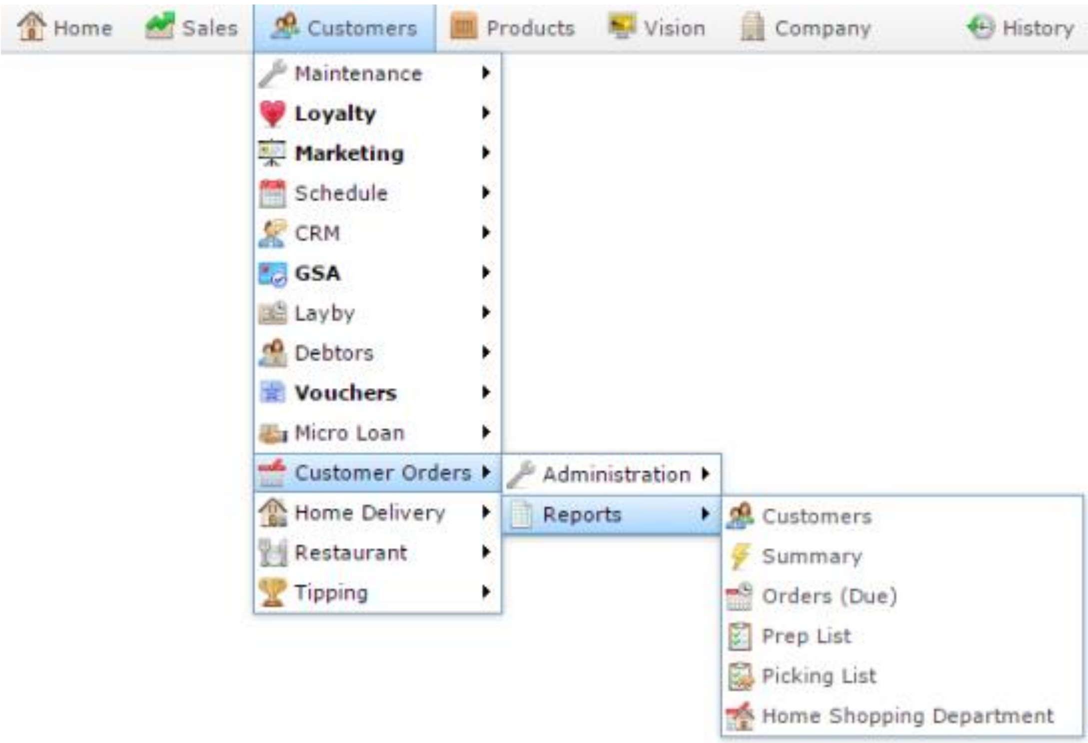
Use the Preparation List report to view the list of orders that need to be prepared for customers.

Opening the Preparation List report

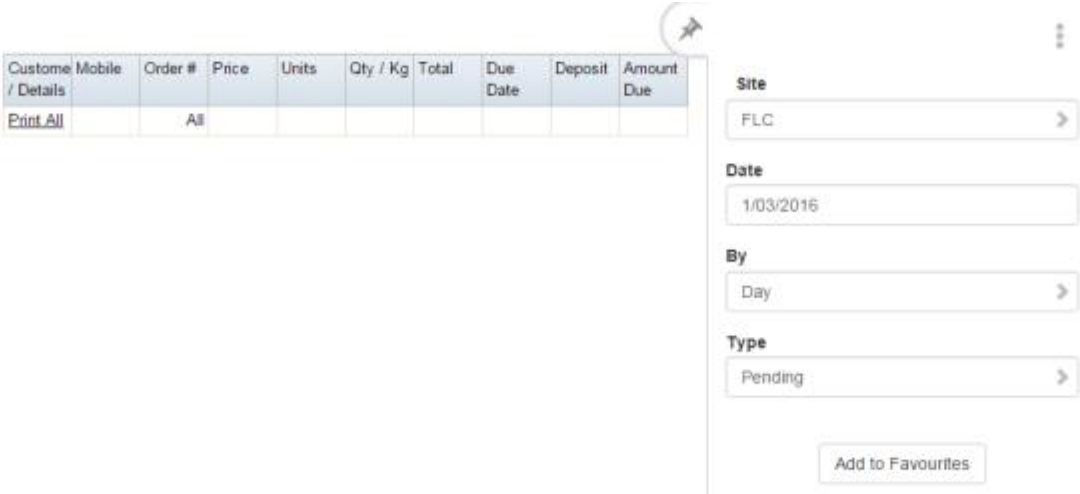
To open the Preparation List report:

1. Press  from the menu bar.

2. Press **Customer Orders** > **Reports** > **Prep List**.



The Preparation List report is displayed.


Custome / Details
Mobile
Order #
Price
Units
Qty / Kg
Total
Due Date
Deposit
Amount Due
Print All
All
Site
FLC
Date
1/03/2016
By
Day
Type
Pending
Add to Favourites

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.
Type	Select to filter the report to customer's orders that are: ▪ Pending. ▪ Finalised. ▪ Delivered. ▪ All customer orders.

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:

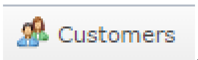
- *Creating a new customer management record* on page 96.
- *Editing a customer management record* on page 114.

Creating a new customer management record

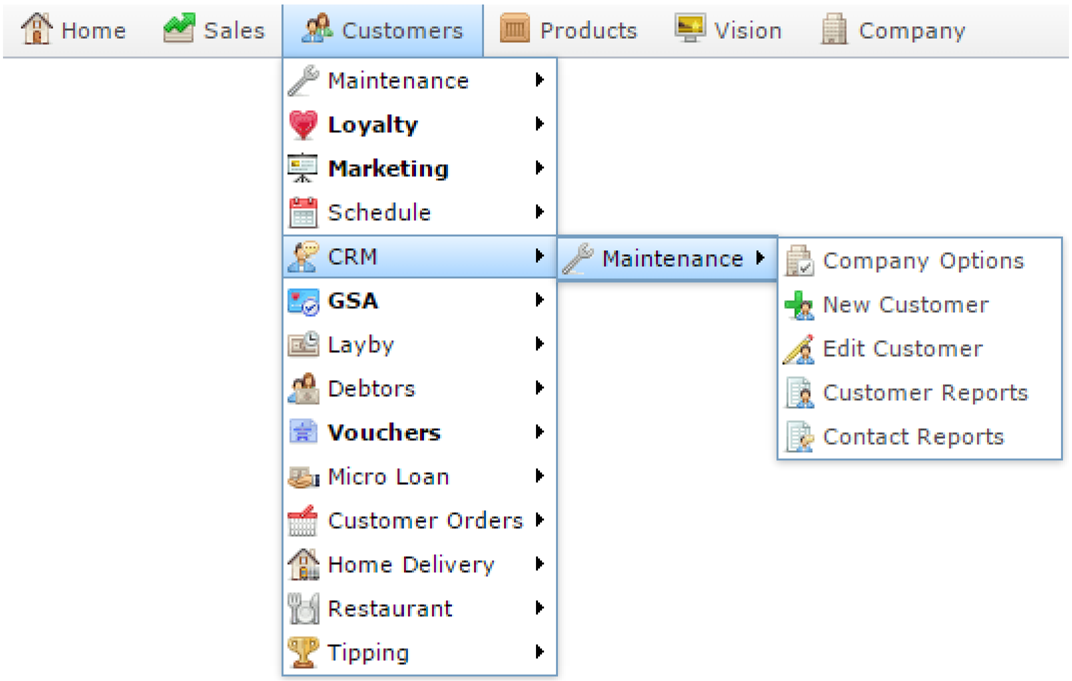
Create a new customer management record to manage customer contact and information.

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

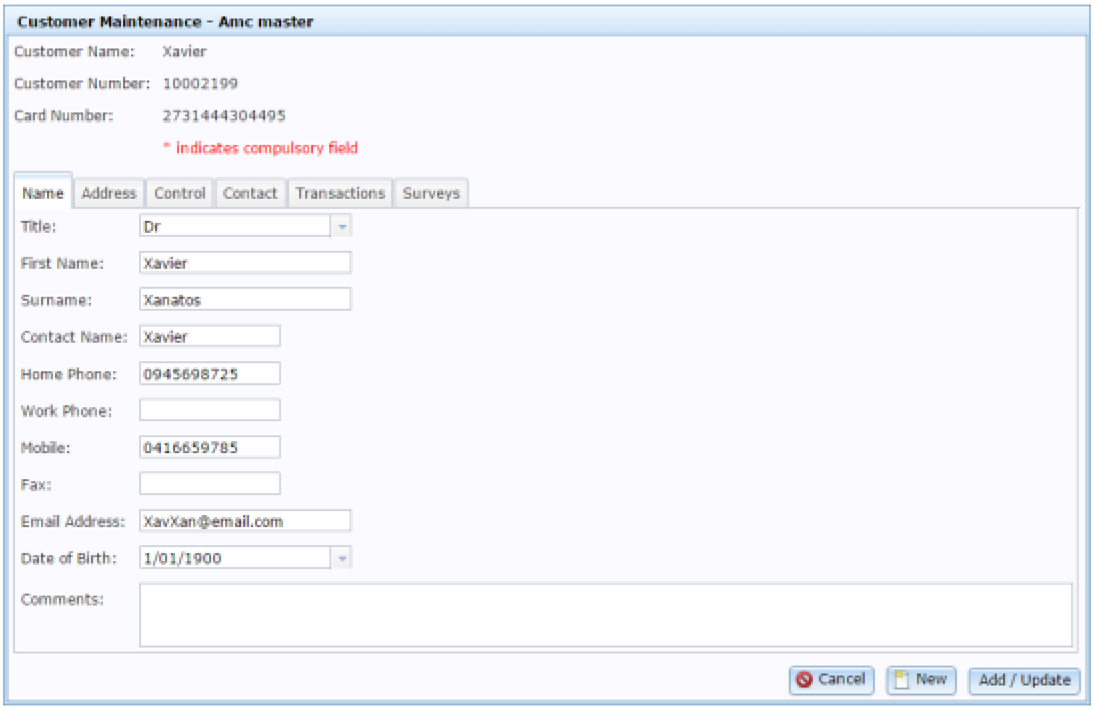
To create a new customer management record:

1. Press 

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

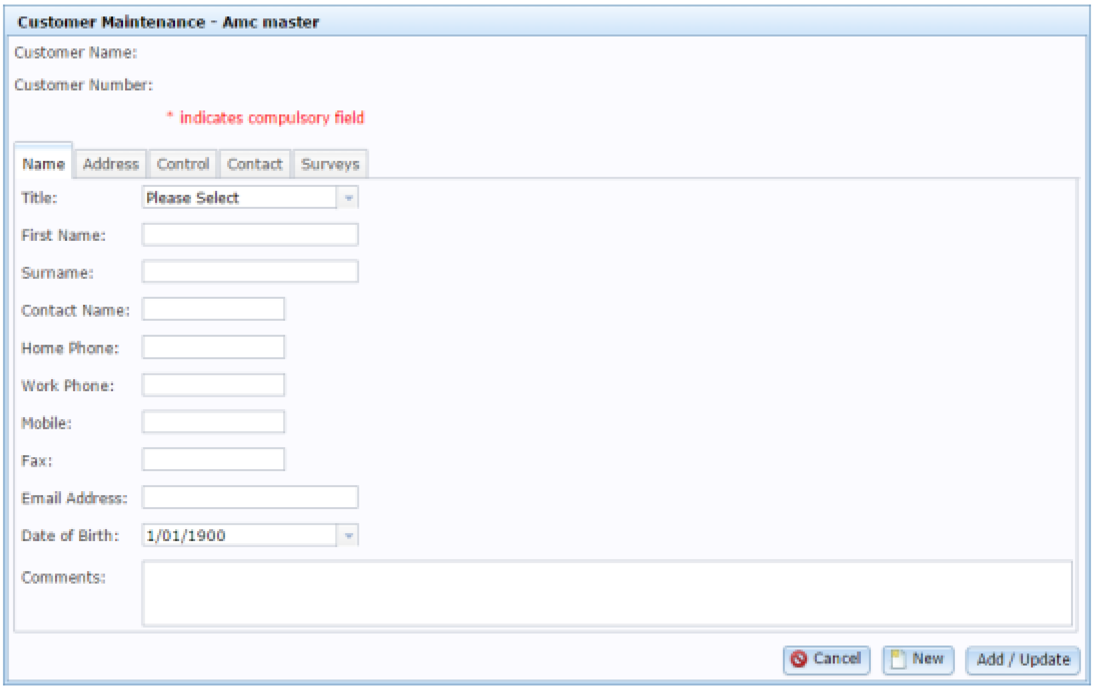


The Customer Maintenance screen is displayed.



3. Press New.

   The Customer Maintenance screen is displayed.



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.

The new customer management record is created.

Finding a customer

Find a customer when you want to:

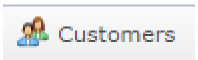
- View or edit the customer's details.
- Contact the customer.
- Fill a customer order for that customer.
- Perform another task that requires specifying the customer.

You can either:

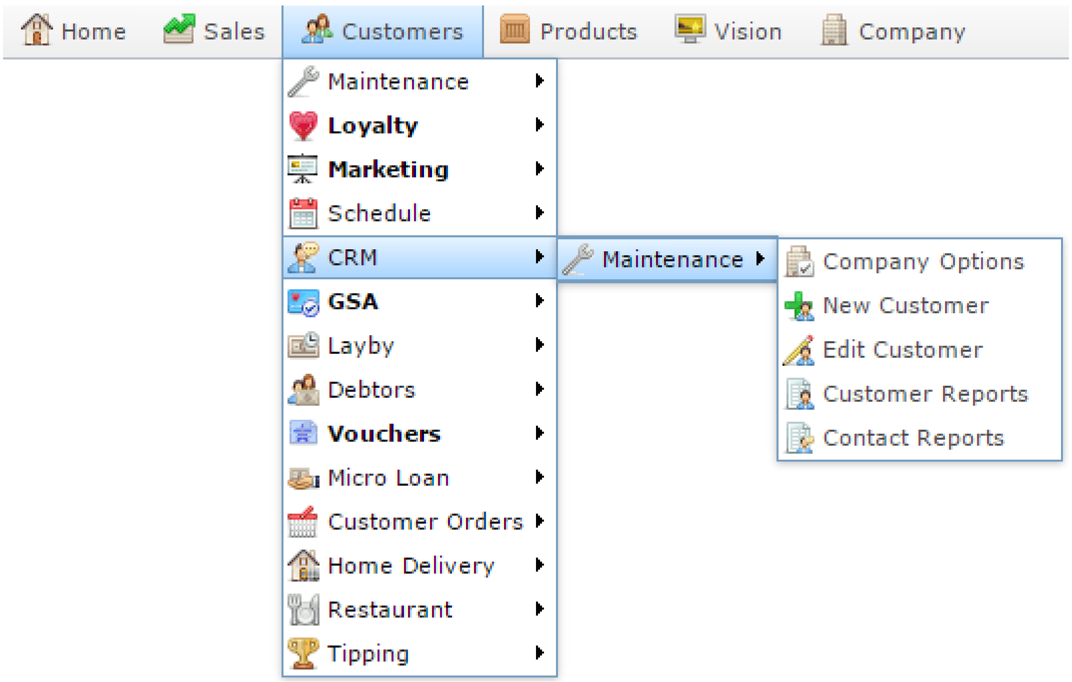
- List all customers starting with a chosen letter.
- Search for a customer by typing information in the search fields.

Opening the Find Customer screen

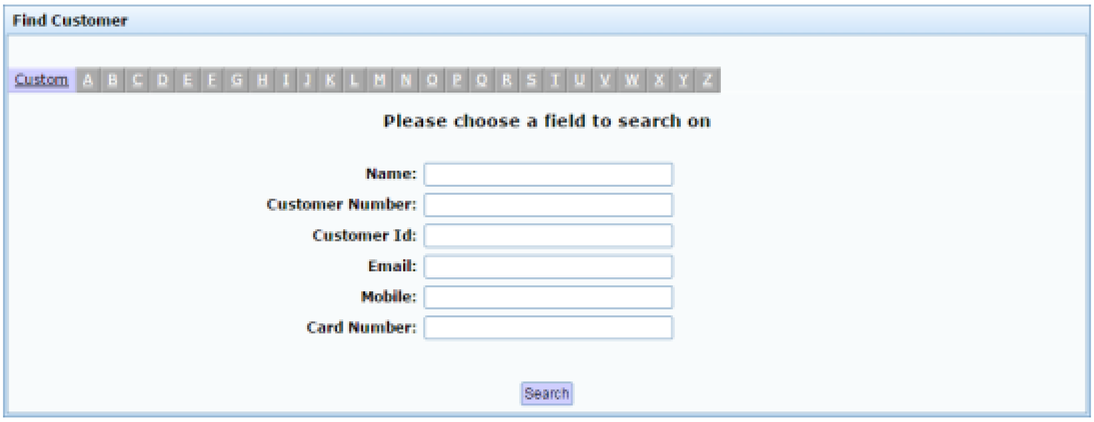
To open the Find Customer screen:

1. Press  in the main menu bar.

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



The Find Customer screen is displayed.


Find Customer
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

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.

The customers that start with that letter are listed alphabetically.

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.

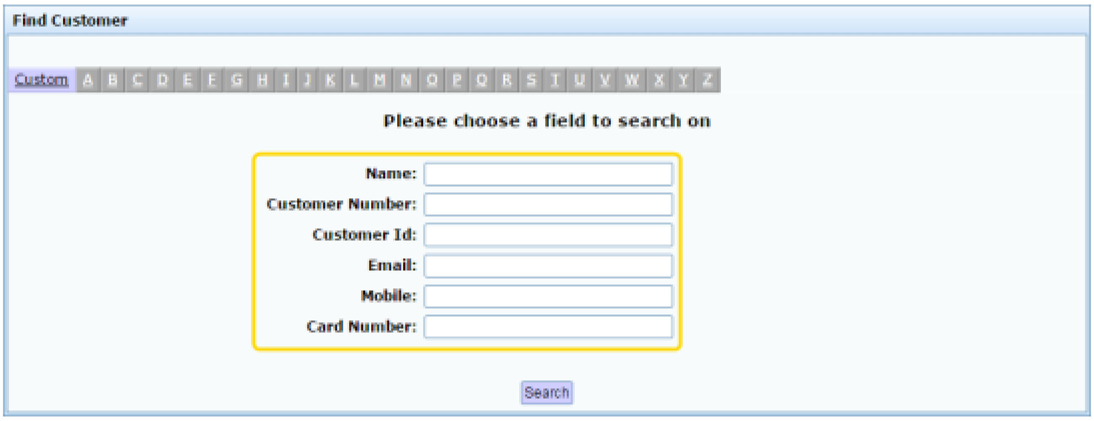
- Using the first search field that contains data.

  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.



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.

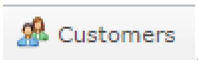
Customer Maintenance screen

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

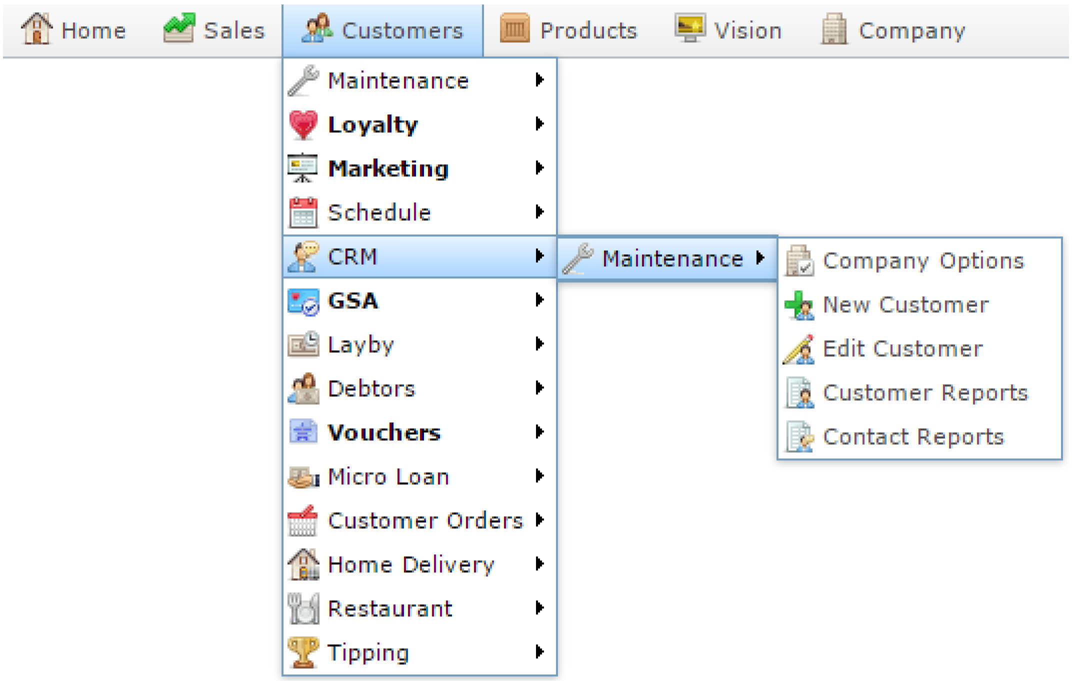
- Their contact details.
- A schedule for regular contact.
- When and how they prefer to be contacted.
- Records of previous times the customer was contacted.
- The customer's transactions with your company.
- Marketing surveys the customer has completed.

Opening the Customer Maintenance screen

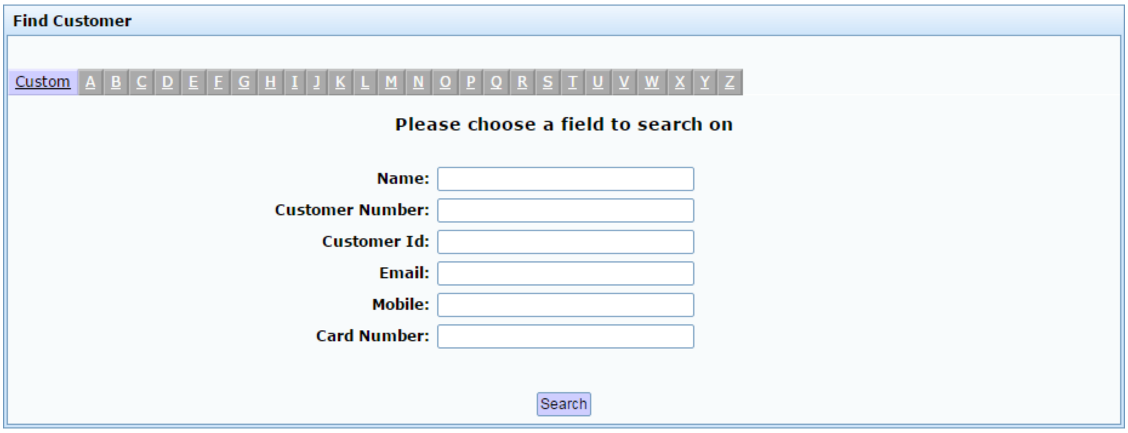
To open the Customer Maintenance screen:

1. Press 

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



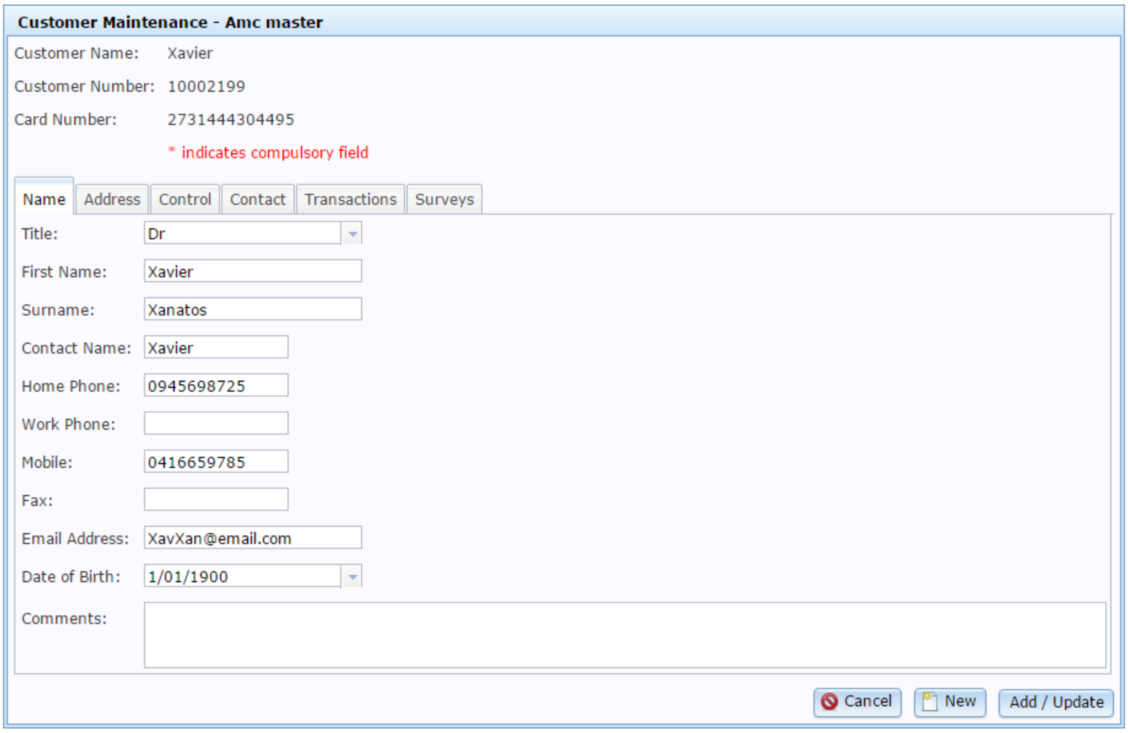
The Find Customer screen is displayed.



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

   See *Finding a customer* on page 99.

   The Customer Maintenance screen is displayed.



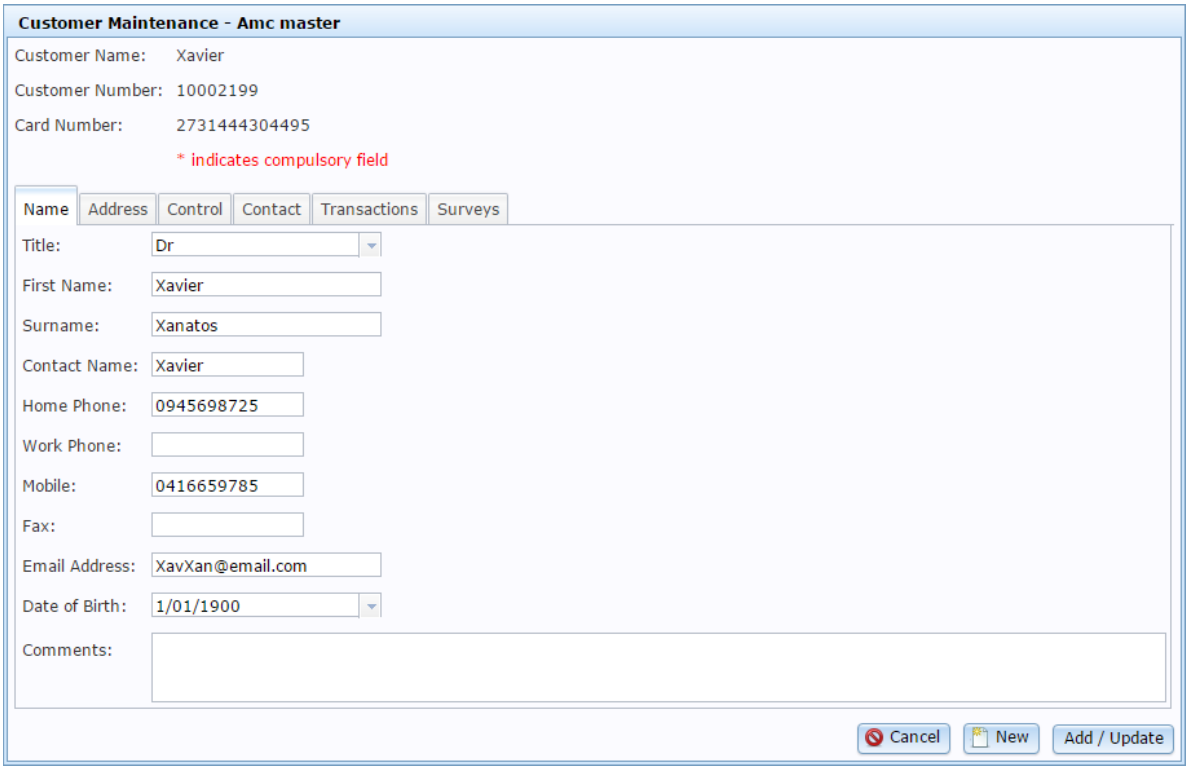
Customer Maintenance screen key fields and buttons

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.
	Press to undo any changes made since the last save.
	Press to create a new customer.
	Press to save any changes to an existing customer.

Name tab

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

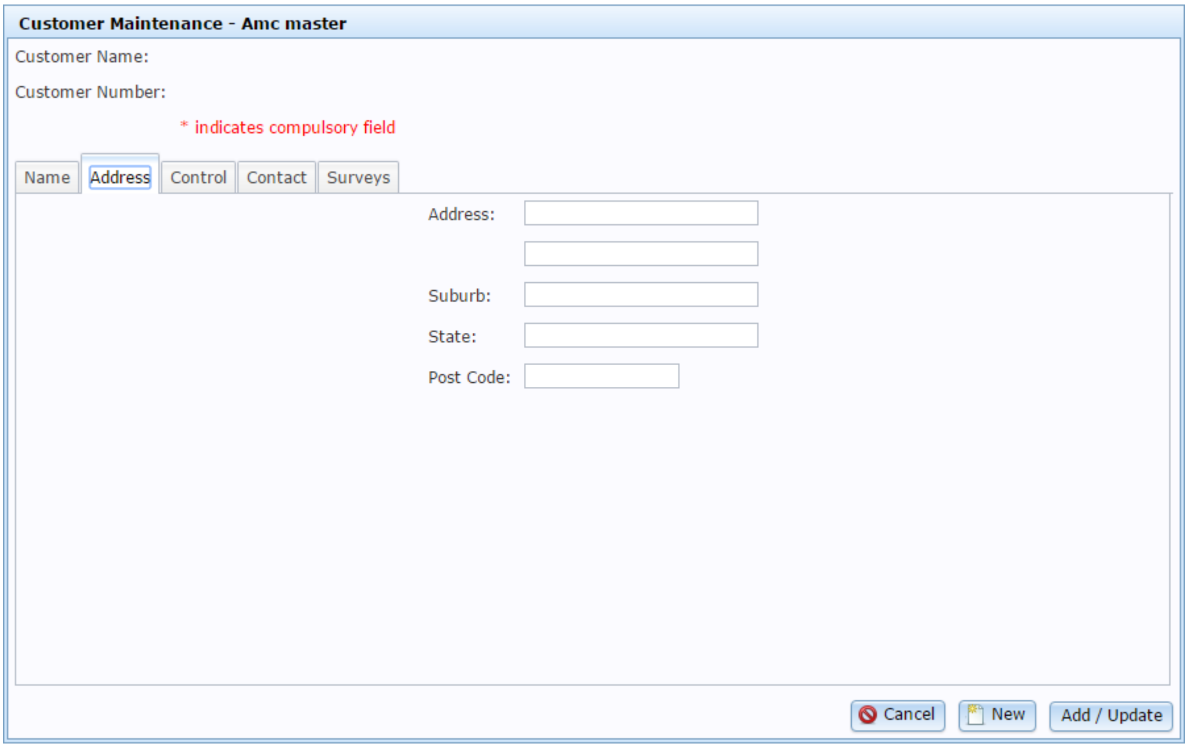


Field	Description
Title	Customer's preferred salutation.
First Name	Customer's first name.
Surname	Customer's last name.
Contact Name	Name of the person to contact about this customer.
Home Phone	Customer's home phone number.

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

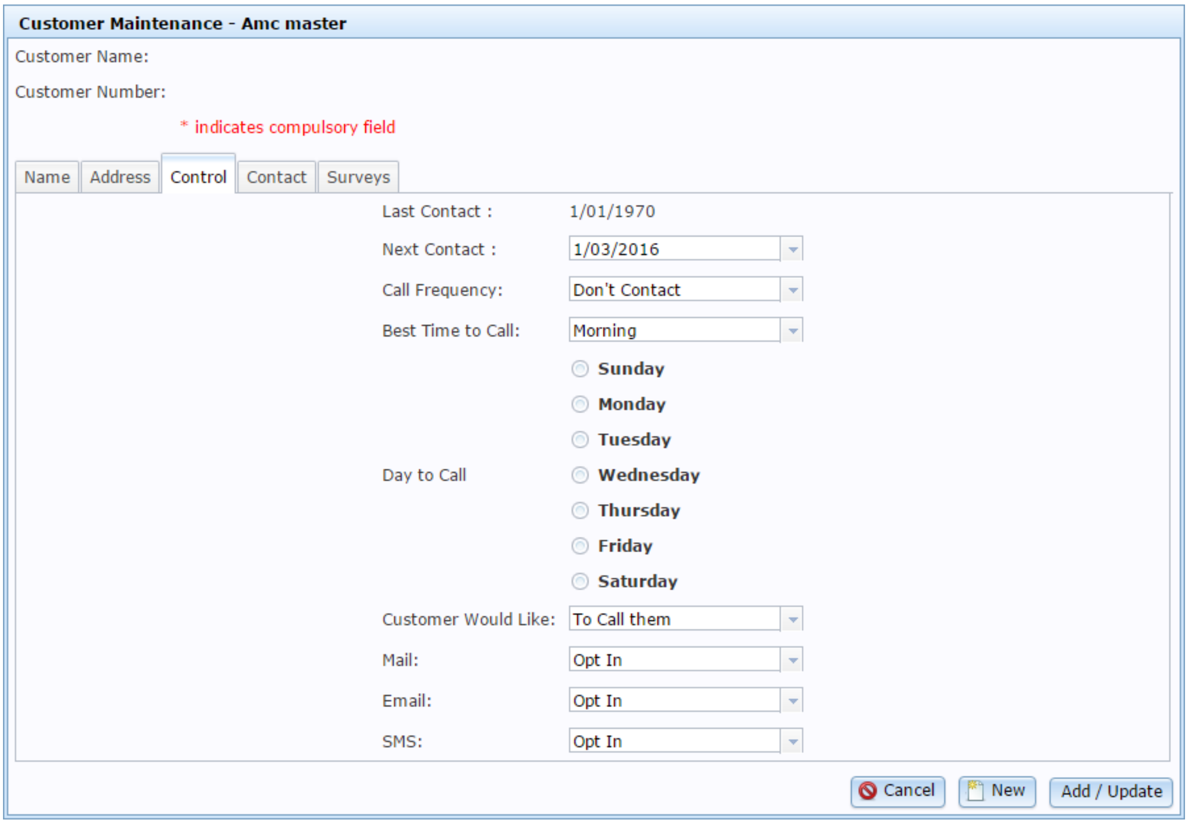
Use this area to define the customer's address.



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.

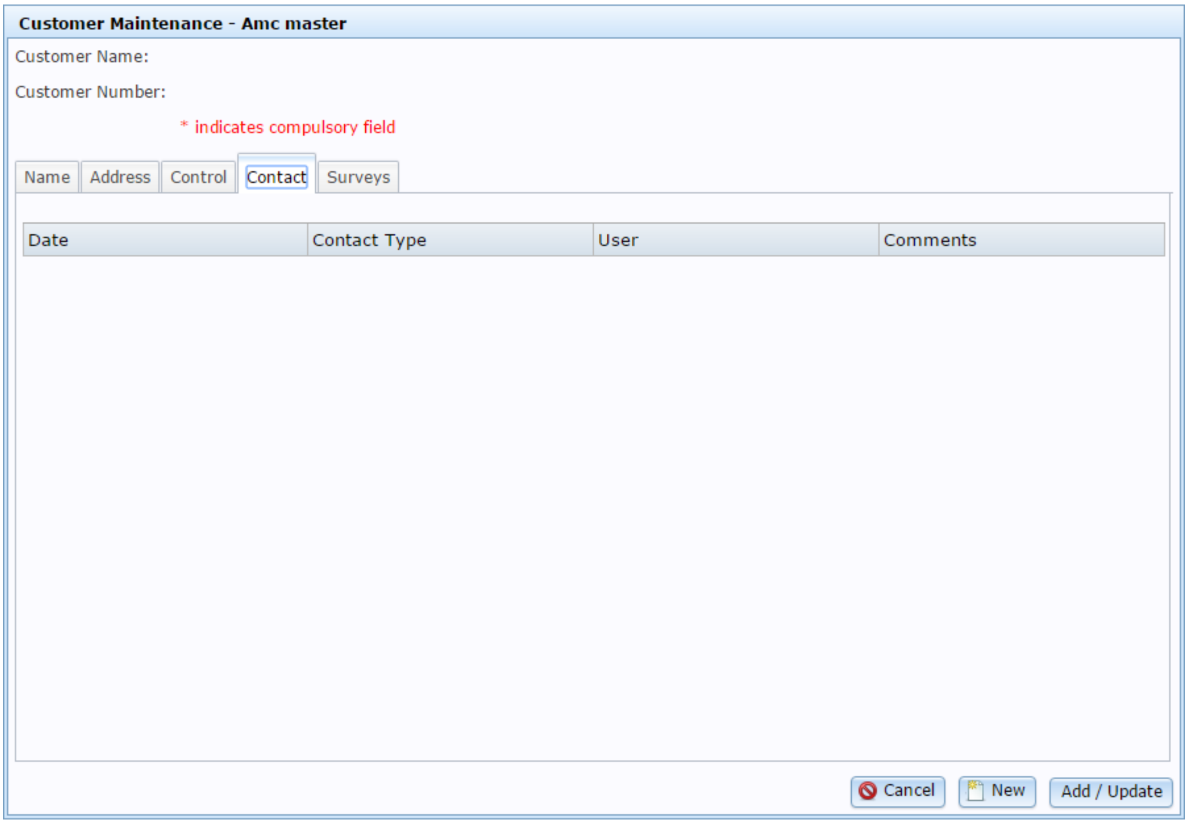


Field	Description
Last Contact	Date the customer was last contacted.
Next Contact	Date the customer is next scheduled to be contacted.
Call Frequency	How often the customer should be contacted.
Best Time to Call	Select the best time of day to call.

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

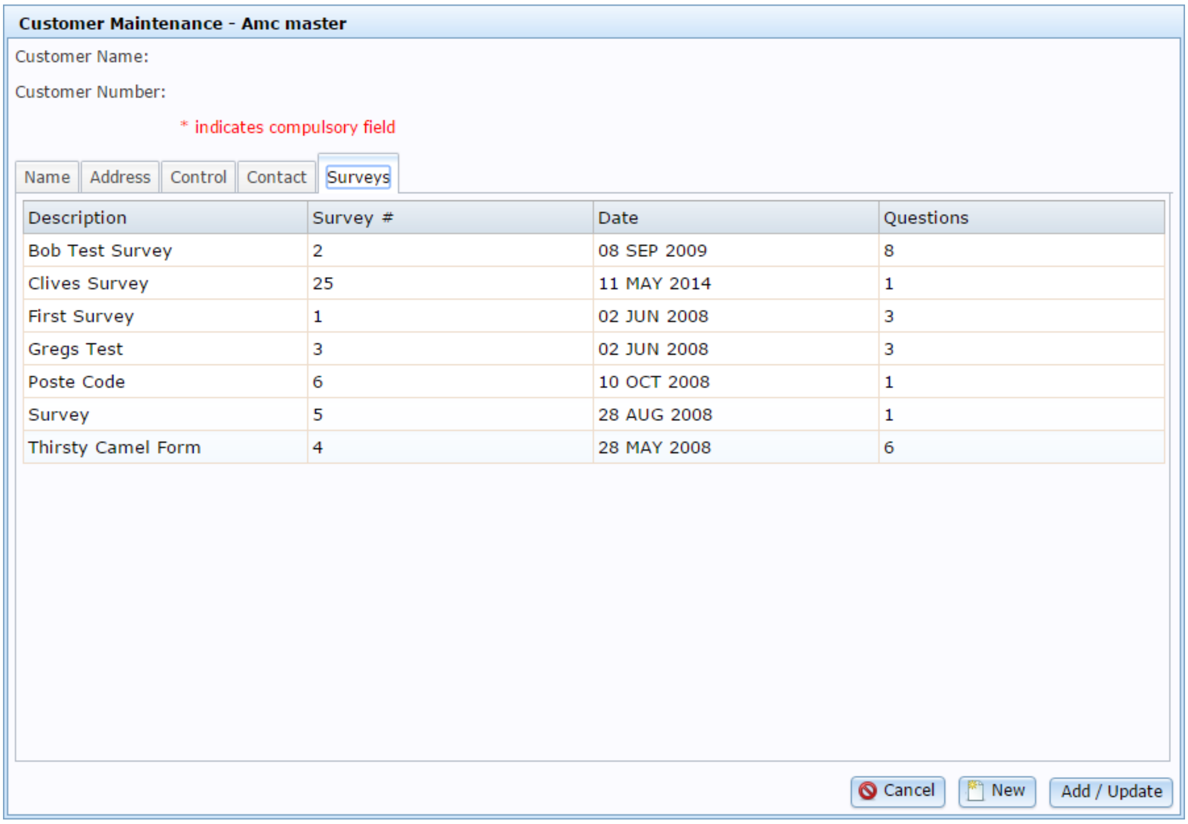
Use this area to view when a customer has been contacted.



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.



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.

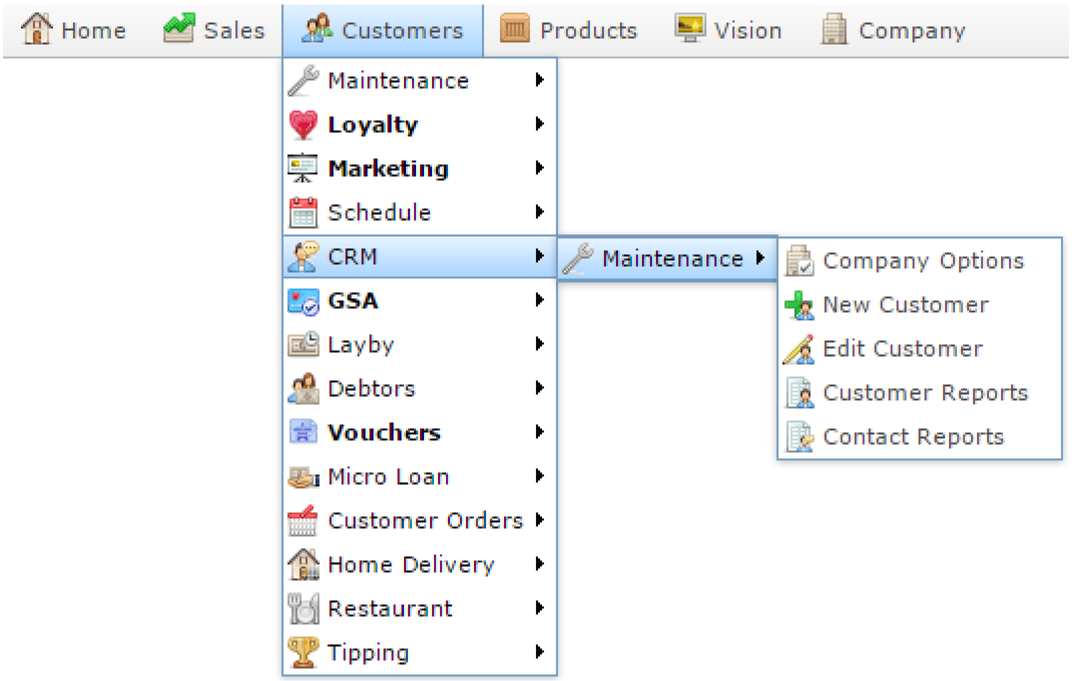
Editing a customer management record

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

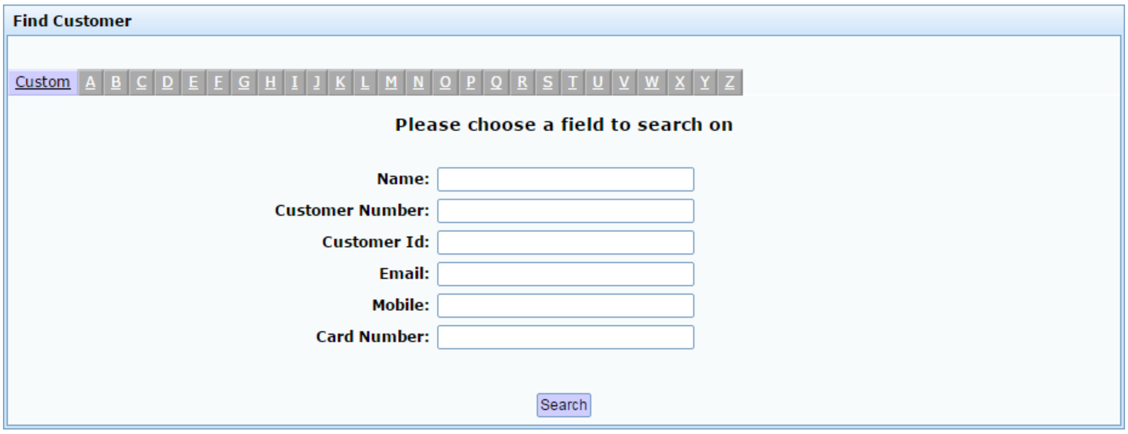
To edit a customer management record:

1. Press 

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



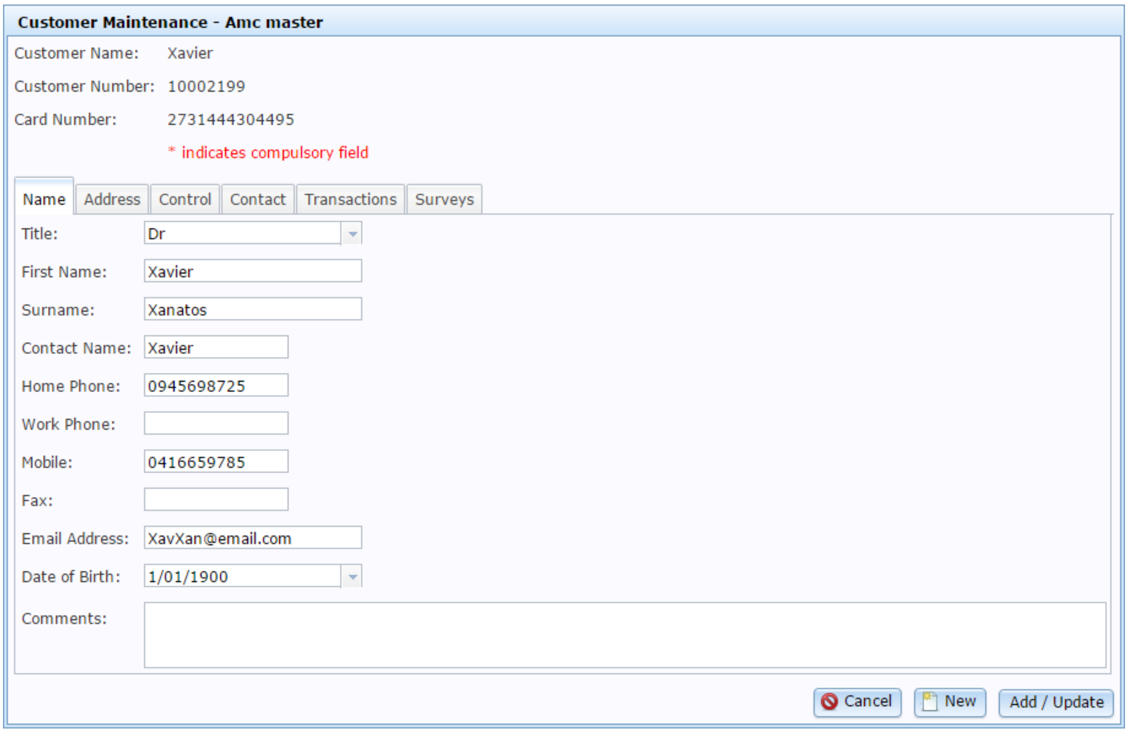
The Find Customer screen is displayed.



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

   See *Finding a customer* on page 99.

   The Customer Maintenance screen is displayed.



4. Make the required changes

   See *Customer Maintenance screen* on page 130.

5. Press Add / Update.

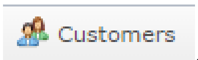
   The changes are saved.

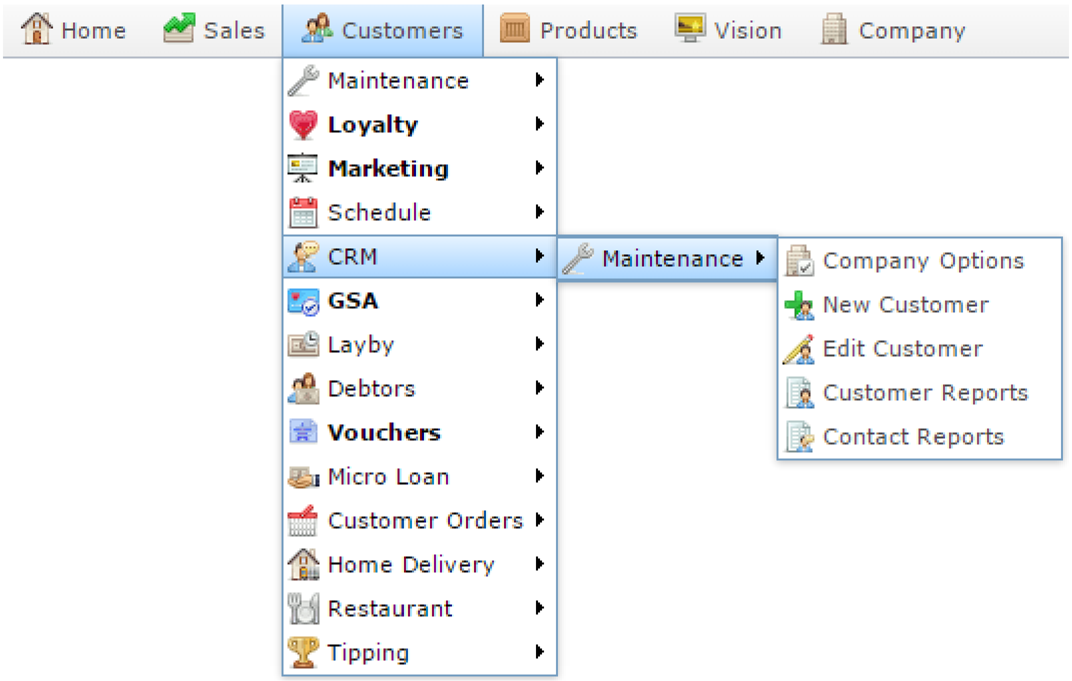
Customer Contact report

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

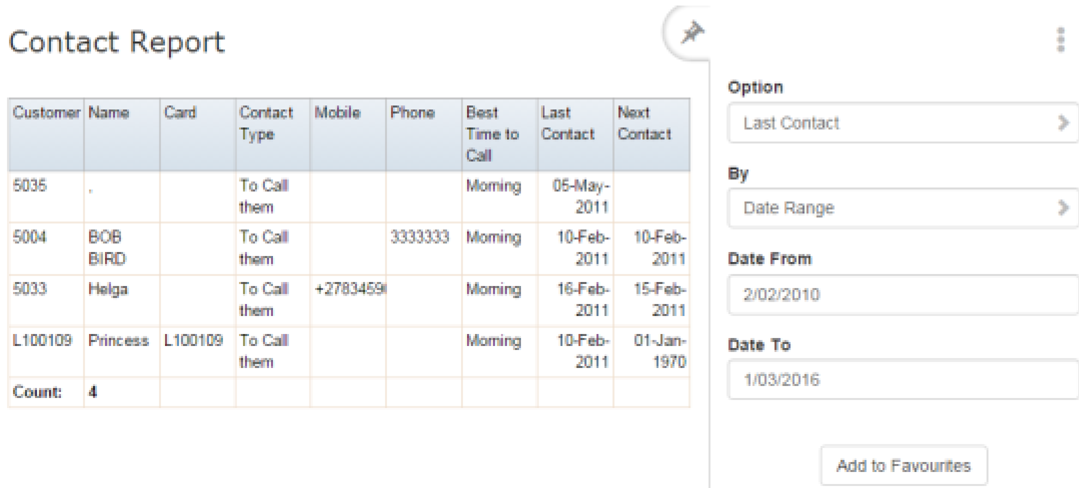
Opening the Customer Contact report

To open the Customer Contact report:

1. Press 
.
2. Press **CRM** > **Maintenance** > **Contact Reports**.



The Customer Contact report is displayed.



Customer	Name	Card	Contact Type	Mobile	Phone	Best Time to Call	Last Contact	Next Contact
5035	.		To Call them			Morning	05-May-2011	
5004	BOB BIRD		To Call them		3333333	Morning	10-Feb-2011	10-Feb-2011
5033	Helga		To Call them	+2783459		Morning	16-Feb-2011	15-Feb-2011
L100109	Princess	L100109	To Call them			Morning	10-Feb-2011	01-Jan-1970
Count:	4							

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: ▪ **Next Contact** to filter the report to customers whose **Next Contact** is within the selected date range. ▪ **Last Contact** to filter the report to customers whose **Last Contact** is within the selected date range.
By	Select to display the report for a specific day, week, month or a period specified between two dates. **Note:** 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.

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

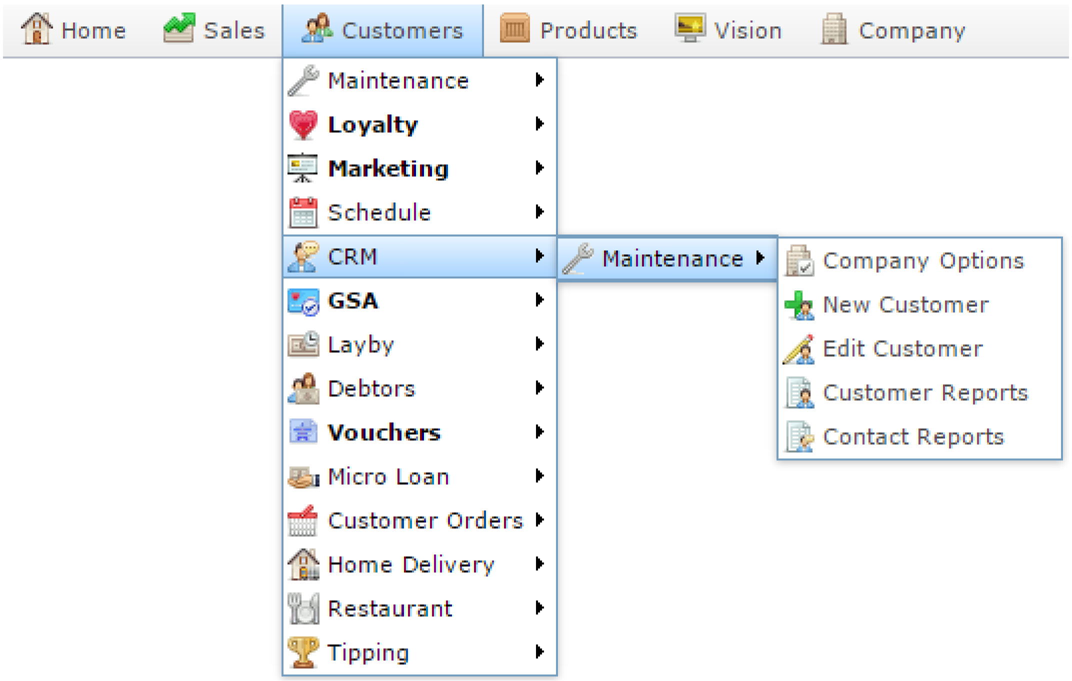
Use the Customer Name and Address Extract report to download the names and addresses of customers you want to contact.

Opening the Customer Name and Address Extract report

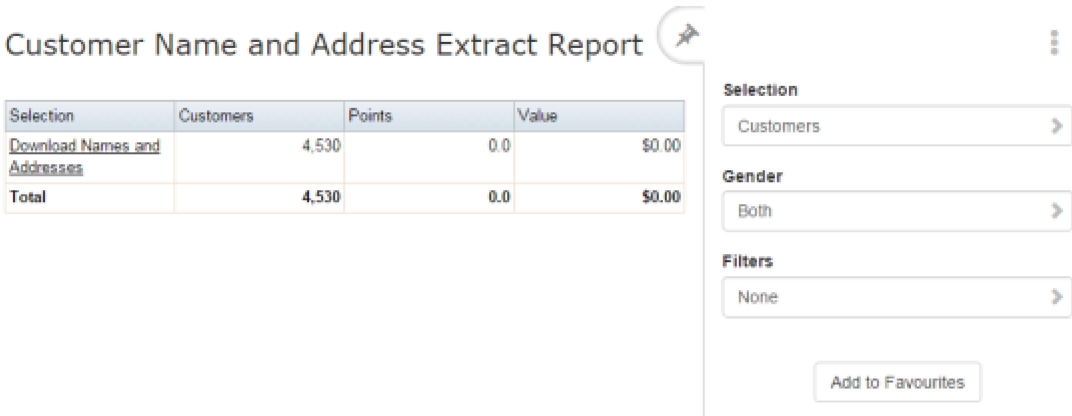
To open the Customer Name and Address Extract report:

1. Press 

.
2. Press **CRM** > **Maintenance** > **Contact Reports**.



The Customer Name and Address Extract report is displayed.



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.

Field	Description
Selection	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.
Gender	Select to restrict the report by gender.

Field	Description
Filter	Select to filter the report by: ▪ State ▪ Post code ▪ Names that start with a chosen letter.

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.

Managing customers

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.

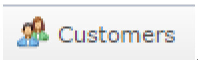
What you can do:

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

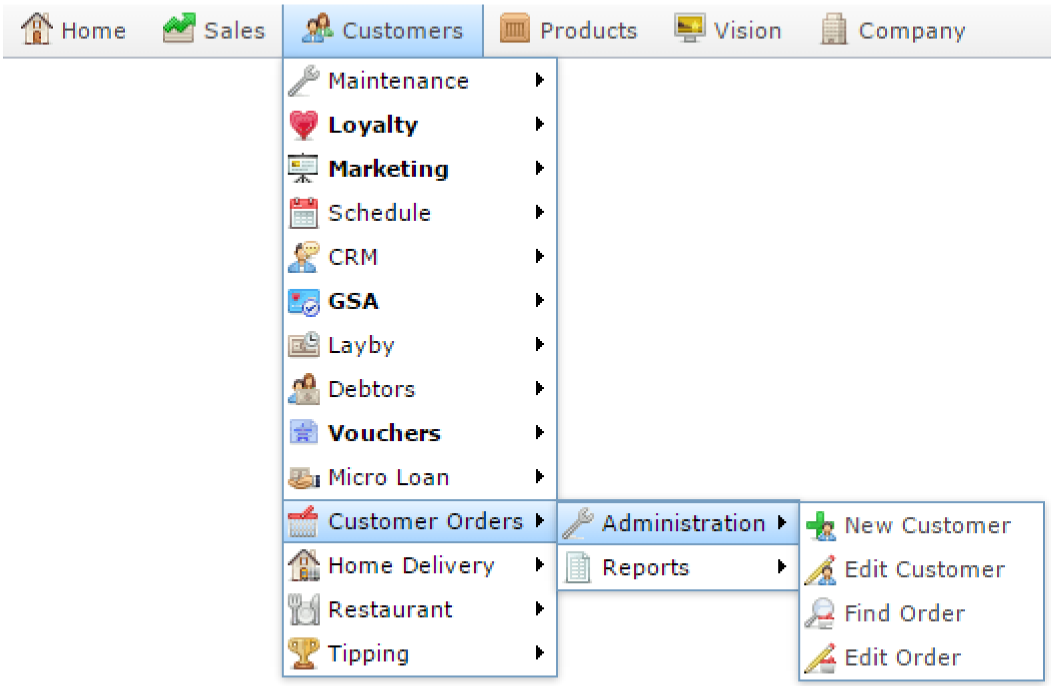
Creating a new customer

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

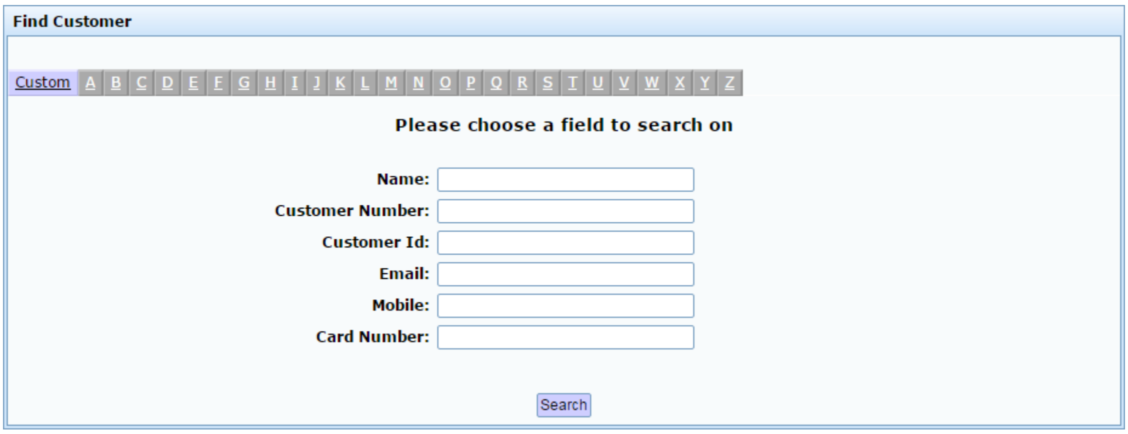
To create a new customer:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **New Customer**.



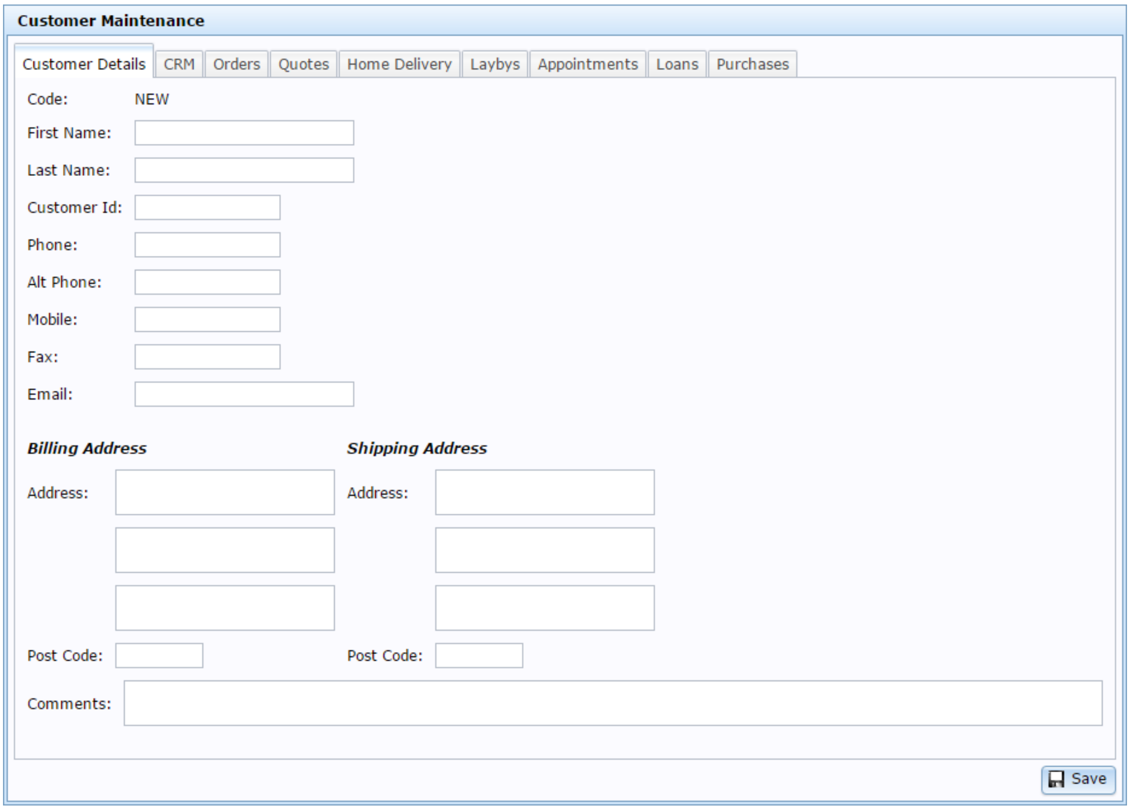
The Find Customer screen is displayed.



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

See *Finding a customer* on page 99.

The Customer Maintenance screen is displayed.



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 

.

   The customer is created.

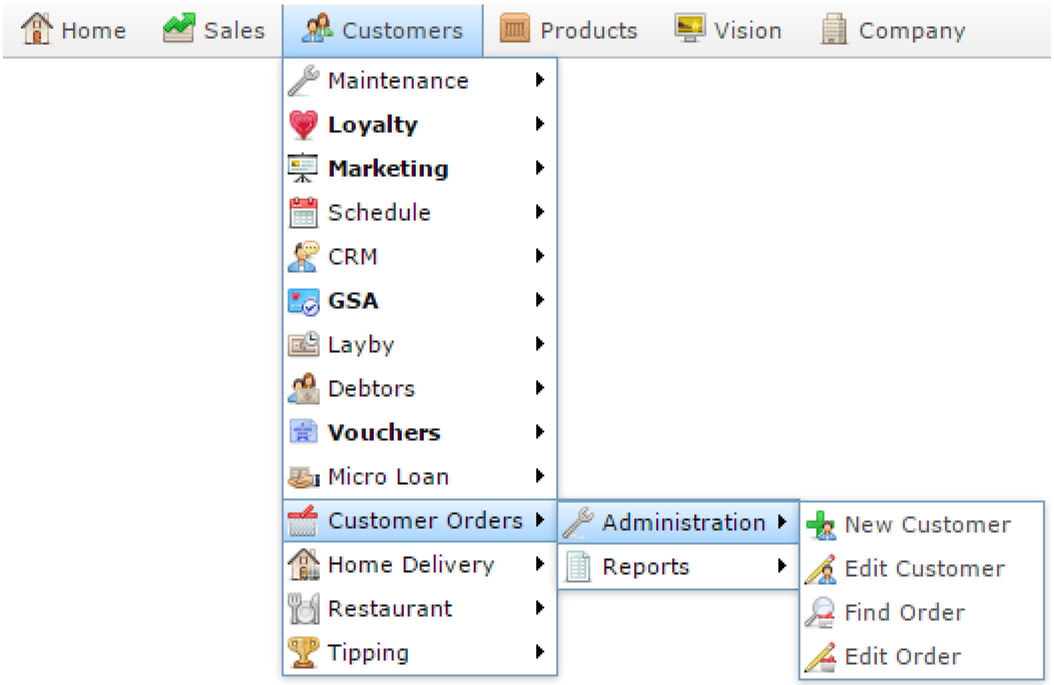
Editing a customer

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

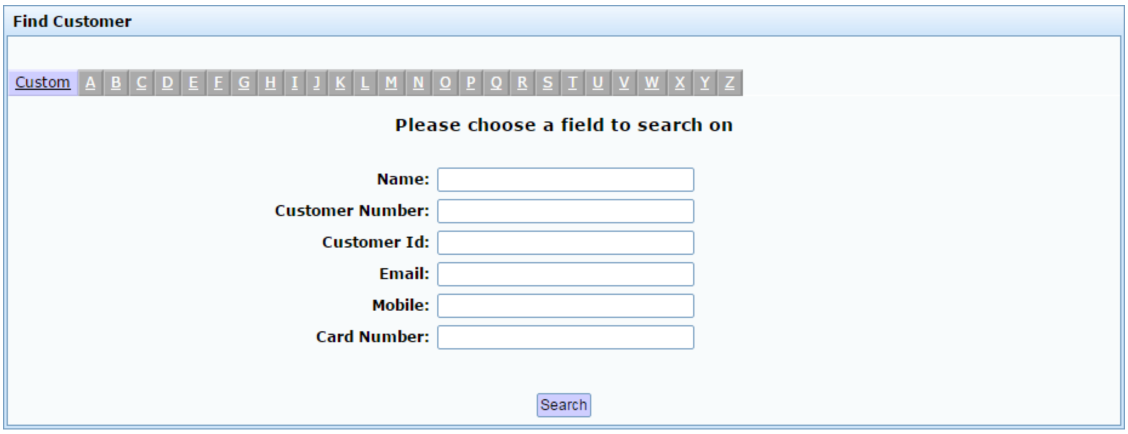
To edit a customer:

1. Press .

2. Press **Customer Orders** > **Administration** > **Edit Customer**.



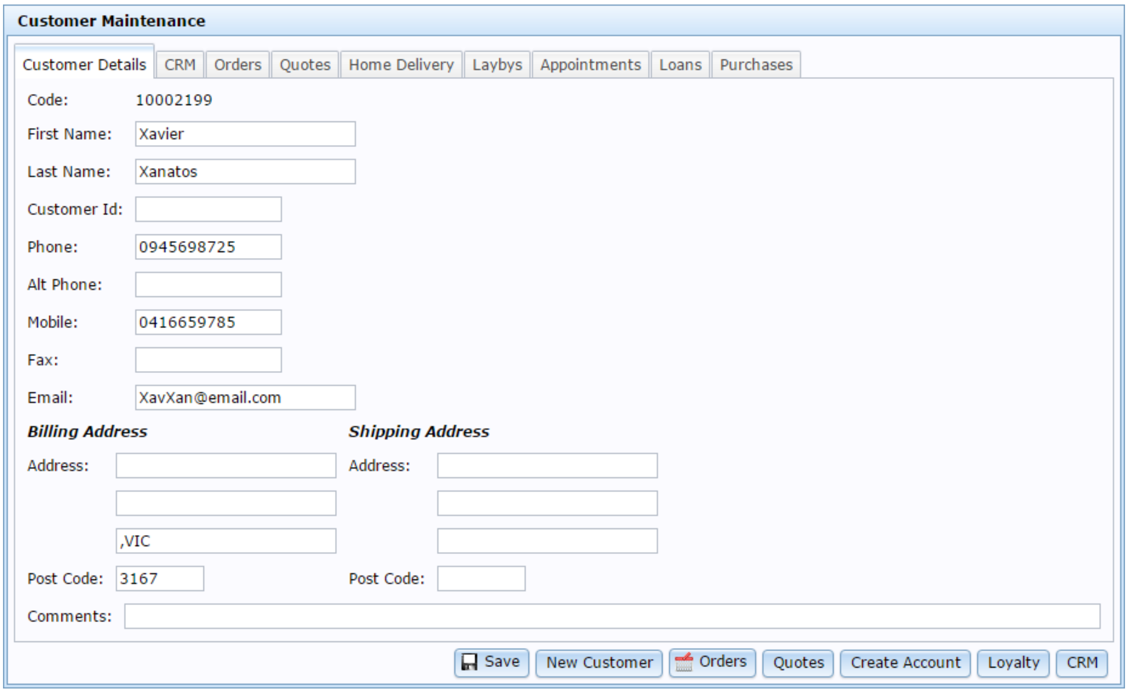
The Find Customer screen is displayed.



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

   See *Finding a customer* on page 99.

   The Customer Maintenance screen is displayed.



4. Edit the fields as required.

   See *Customer Maintenance screen* on page 130.

5. Press 

.

   The customer is created.

Customer Maintenance screen

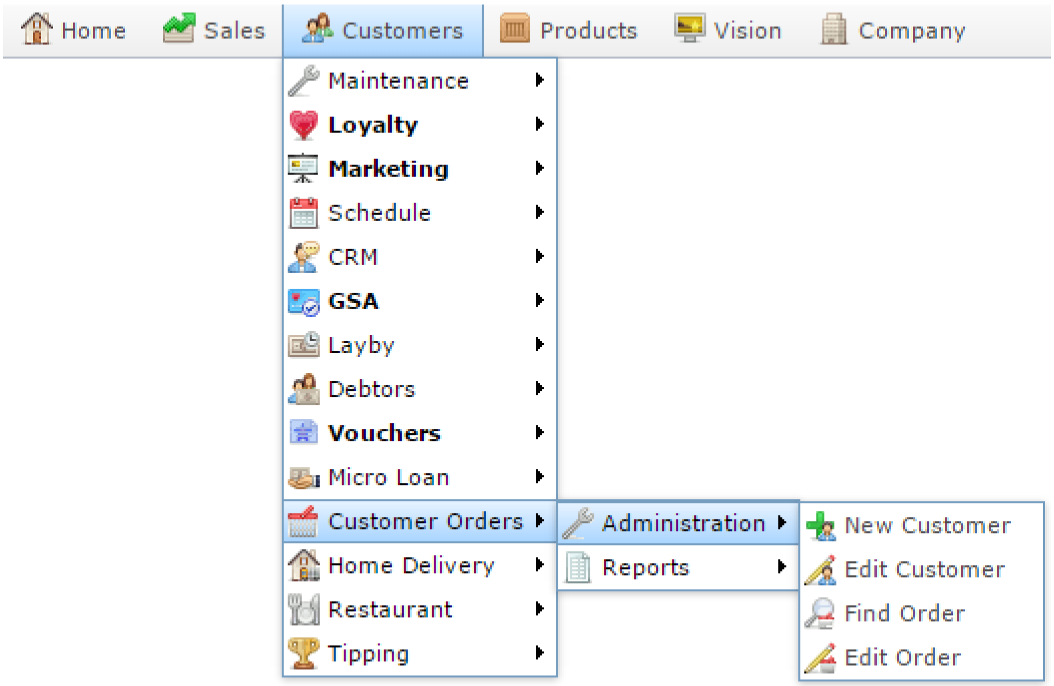
Use this screen to maintain customer details and interactions with the customer such as marketing contacts, orders, purchases, laybys and quotes.

Opening the Customer Maintenance screen

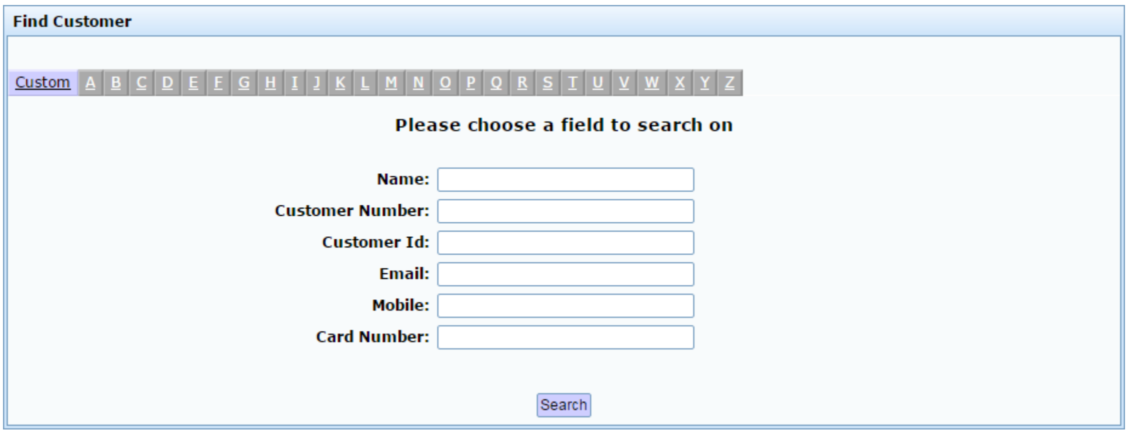
To open the Customer Maintenance screen:

1. Press 

.
2. Press **Customer Orders** > **Administration** > **Edit Customer**.



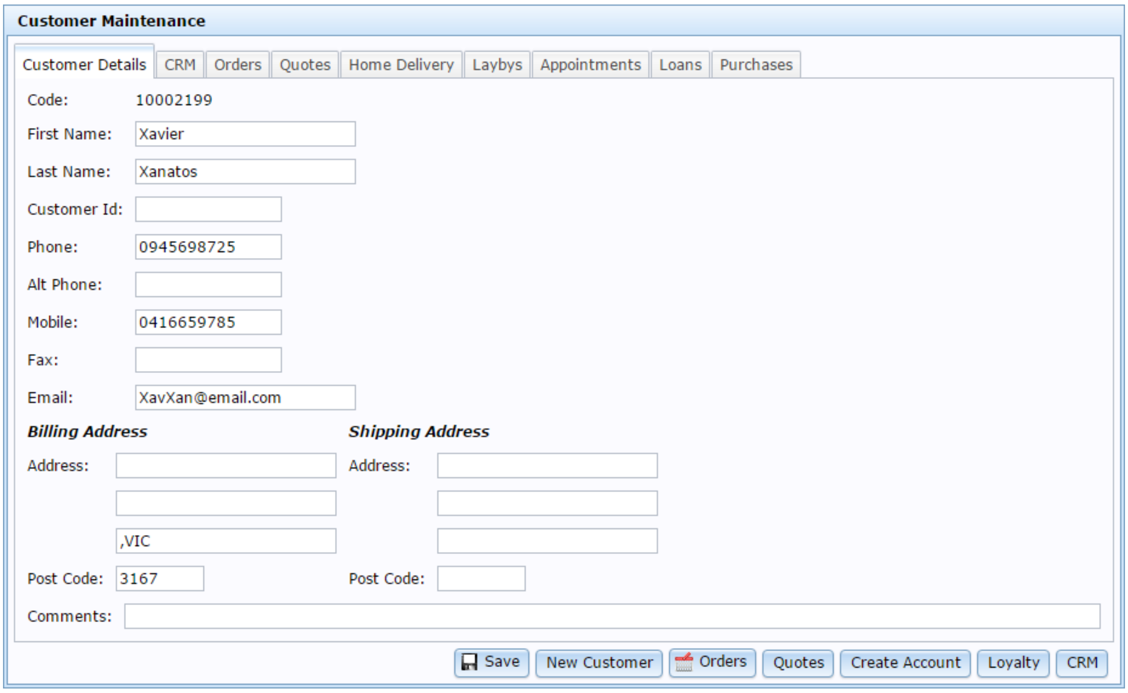
The Find Customer screen is displayed.



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 screen key fields and buttons

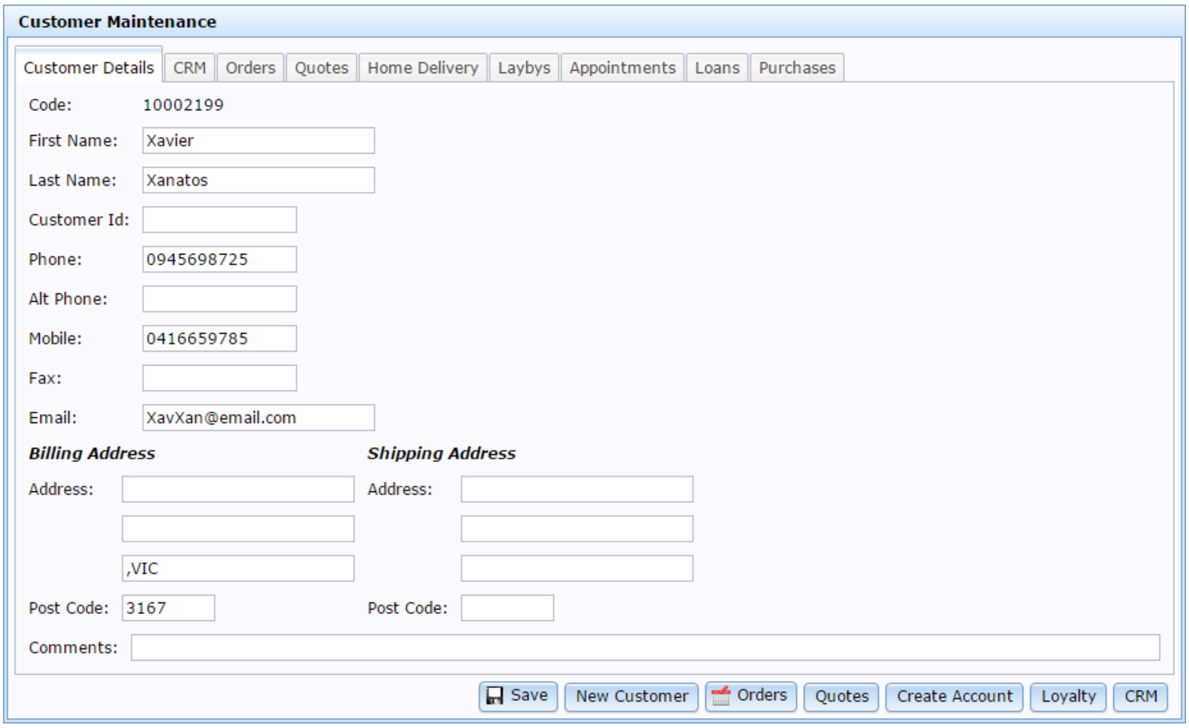
Common buttons

Field	Description
Save	Press to save any changes to the customer details.
New Customer	Press to create a new customer record.
Orders	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.

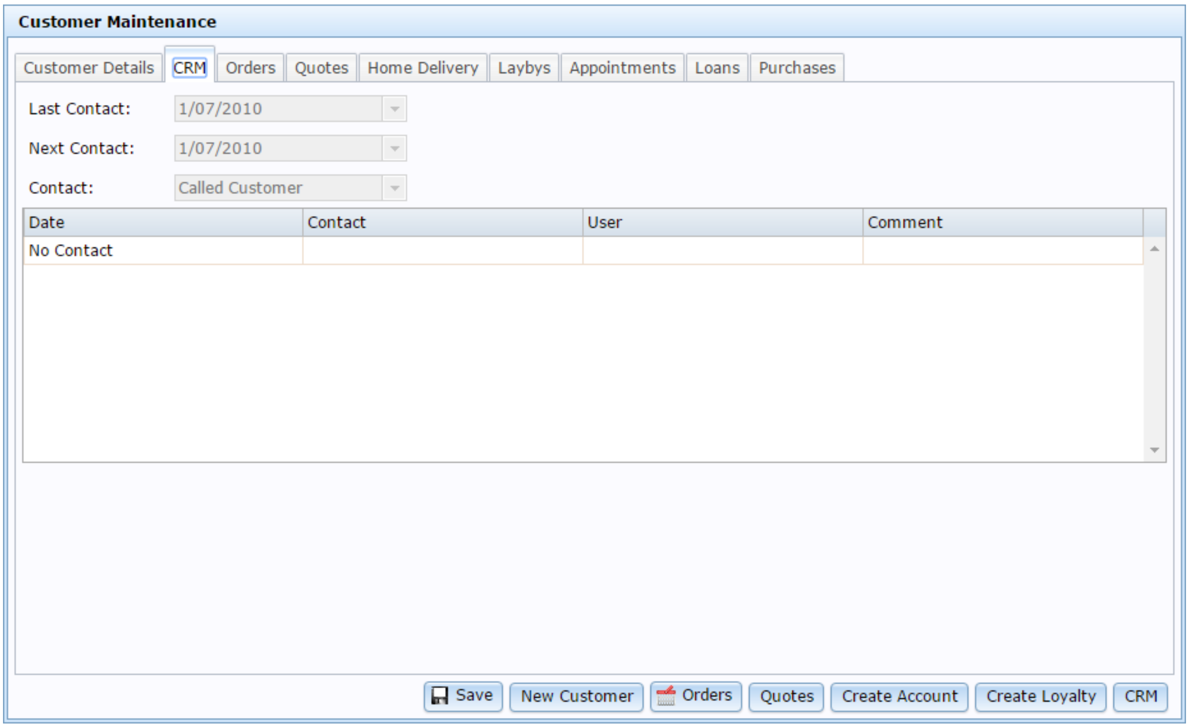


Field	Description
Code	Unique code identifying the customer.
First Name	Customer's first name.
Last Name	Customer's last name.
Customer Id	Customer's ID number in any linked external accounting system you may use, such as Zero. If you do not have an external system linked, you can ignore this field.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

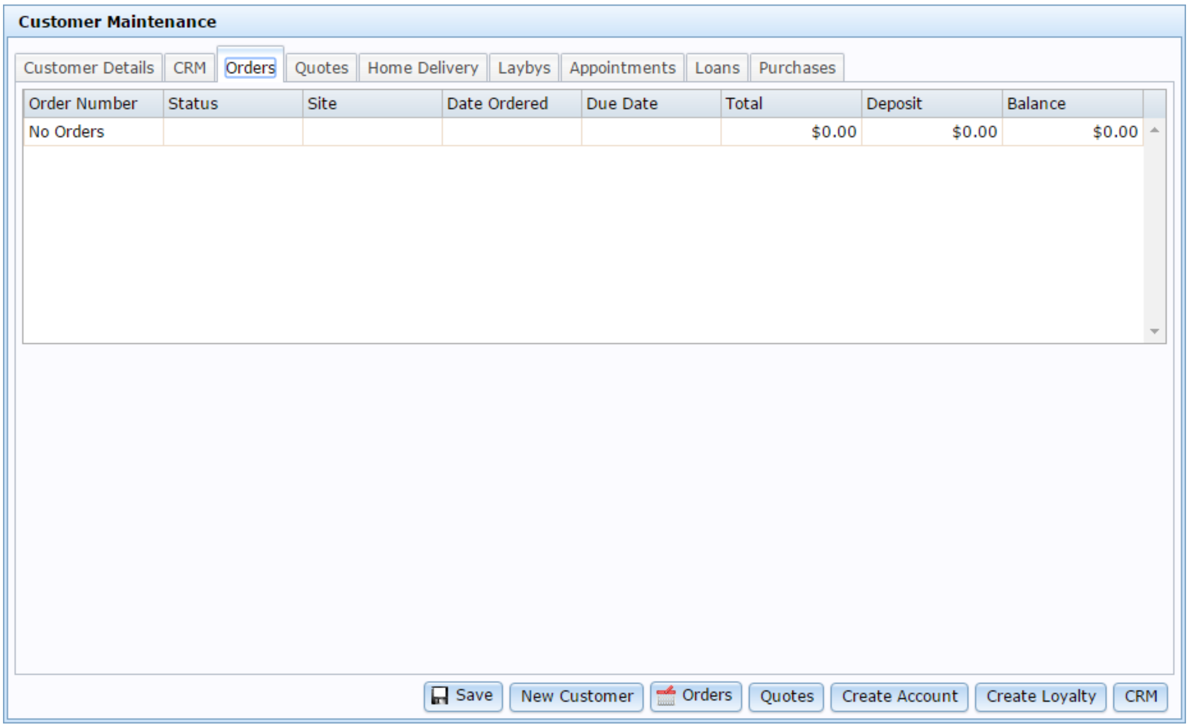
Use this area to view the contact activity with the customer.



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.

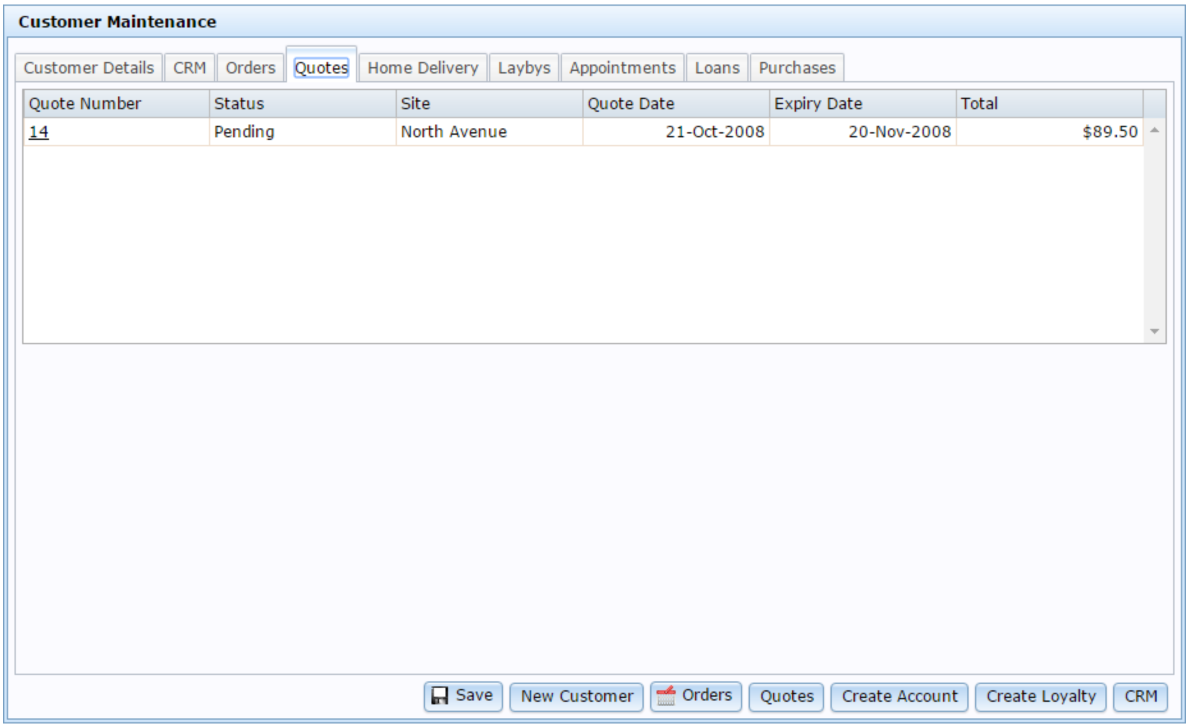


Field	Description
Order Number	Unique number identifying the order.
Status	The status of the order.
Site	The site the order was made.
Date Ordered	Date the order was made.
Due Date	Date the order is due to be collected or delivered.
Total	Total amount of the order.

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

Quotes tab

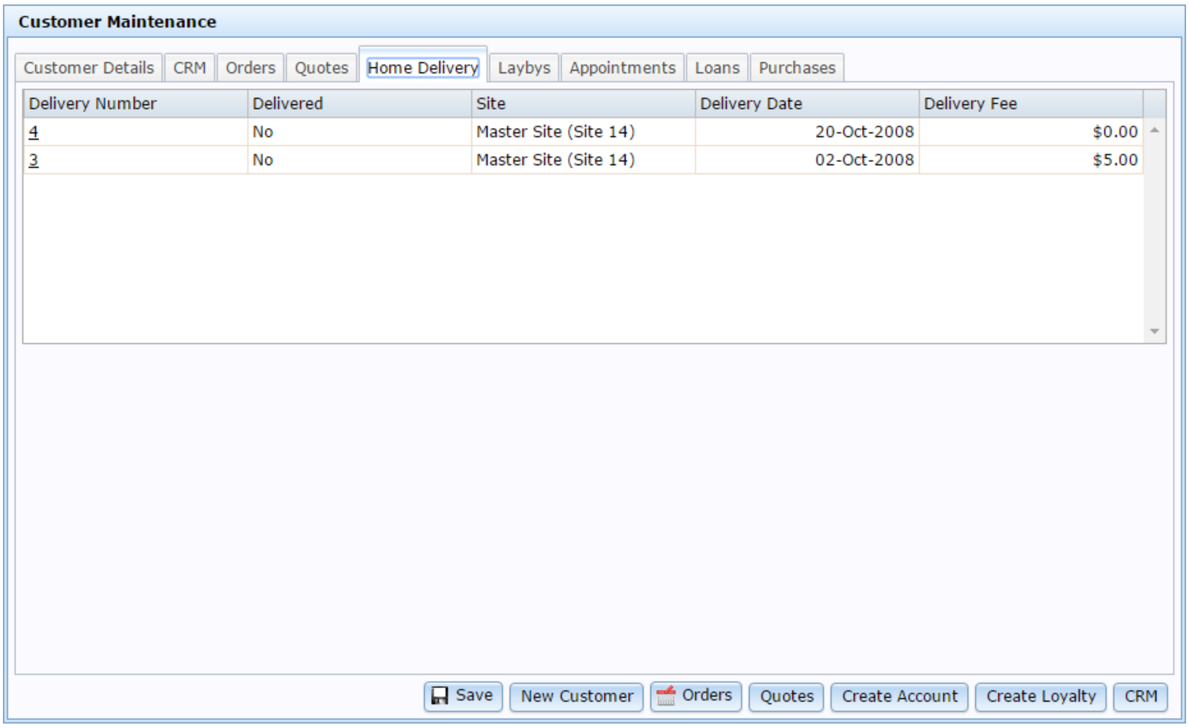
Use this area to maintain the customer's quotes.



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

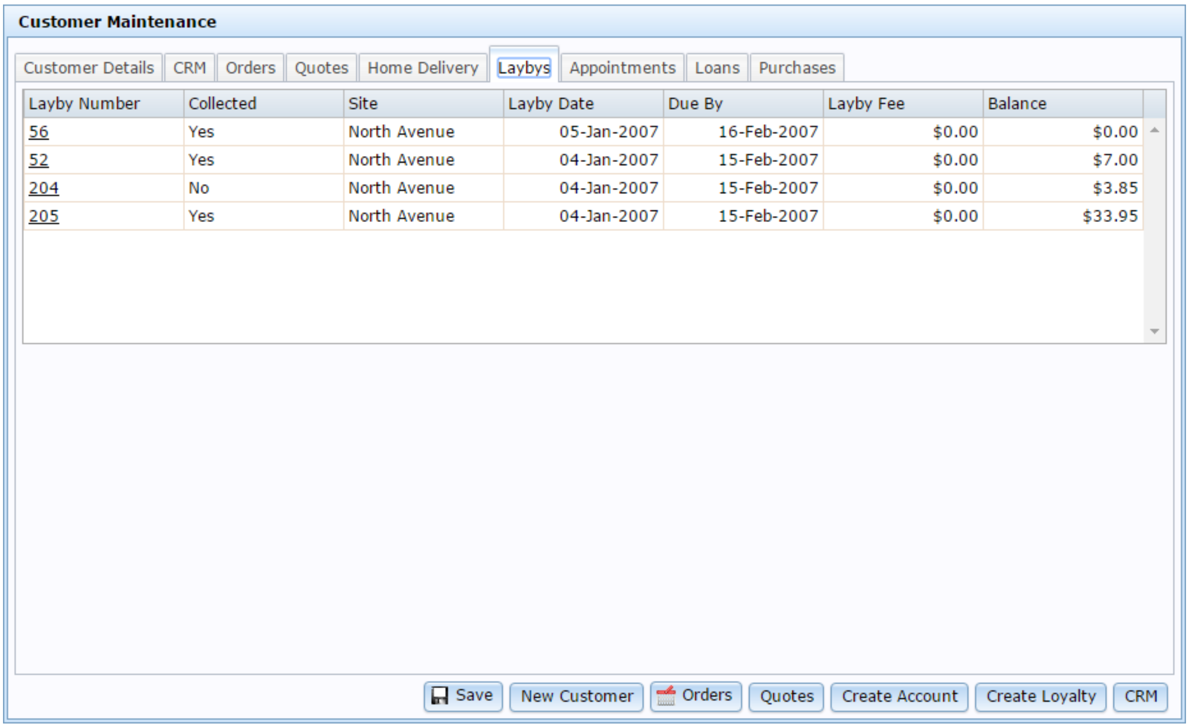
Use this area to maintain orders for home delivery.



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.

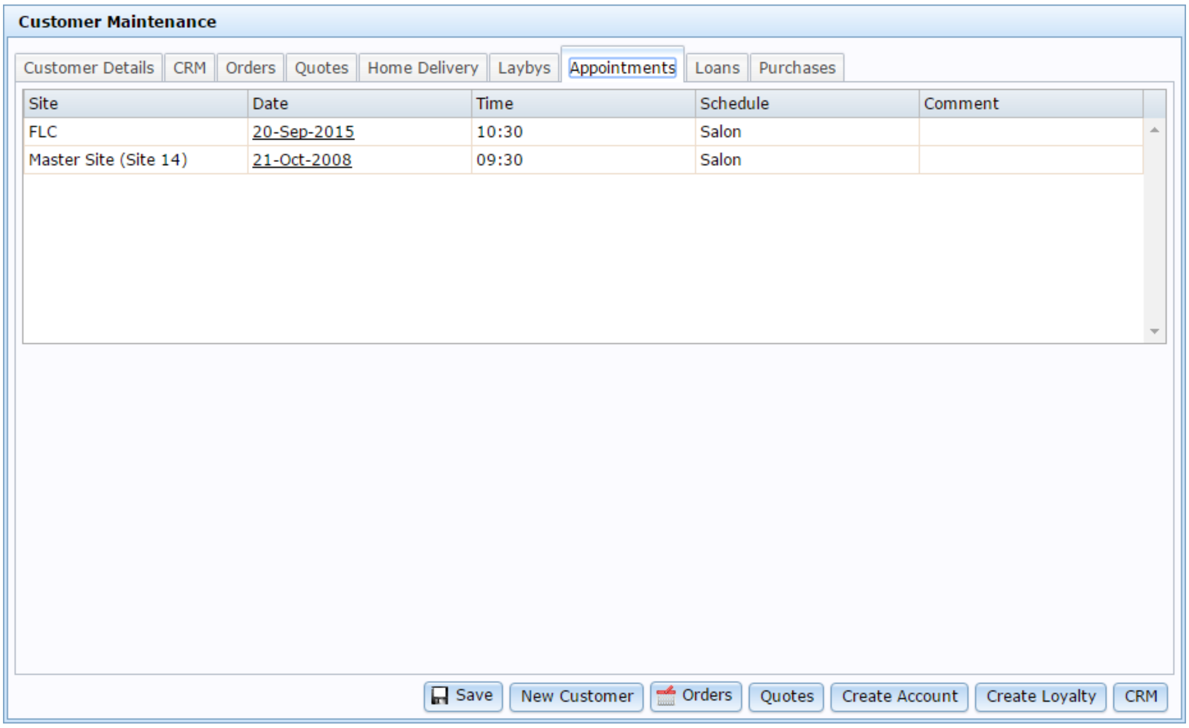


Field	Description
Layby Number	Unique code identifying the layby.
Collected	Whether the layby has been collected by the customer.
Site	Site the layby was created at.
Layby Date	Date the layby was created.
Due By	Date the last layby payment was due.
Layby Fee	Any layby fee charged.

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

Appointments tab

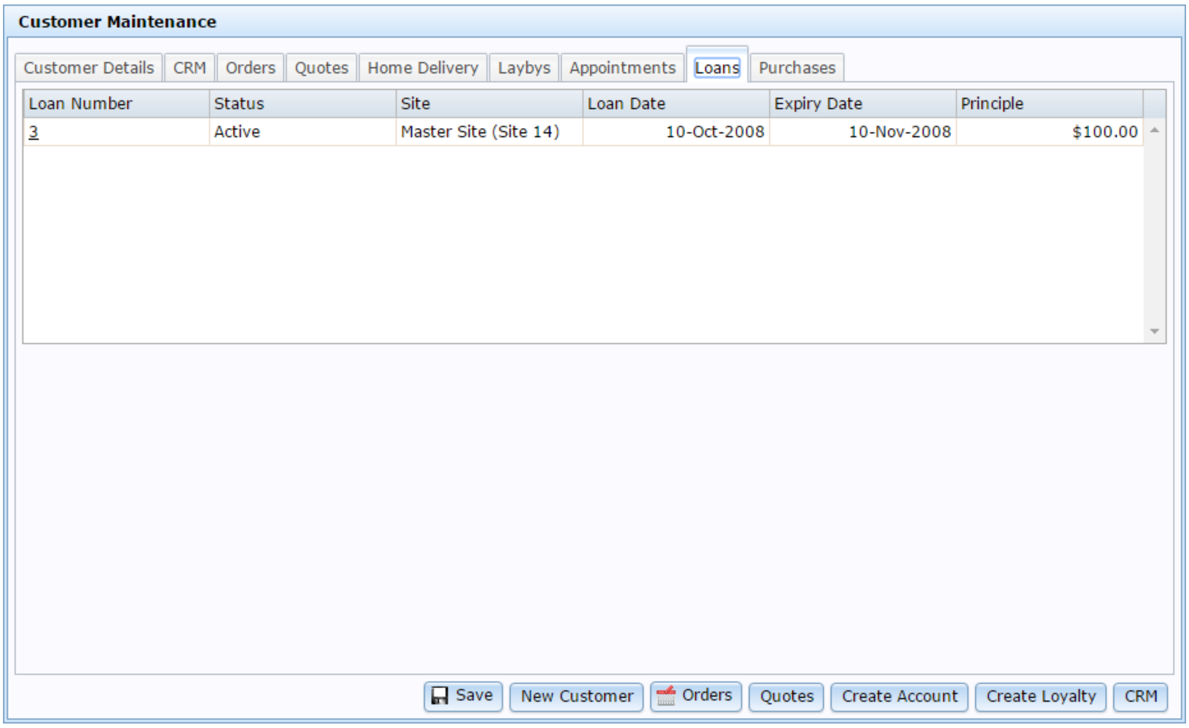
Use this area to maintain the customer's appointments.



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

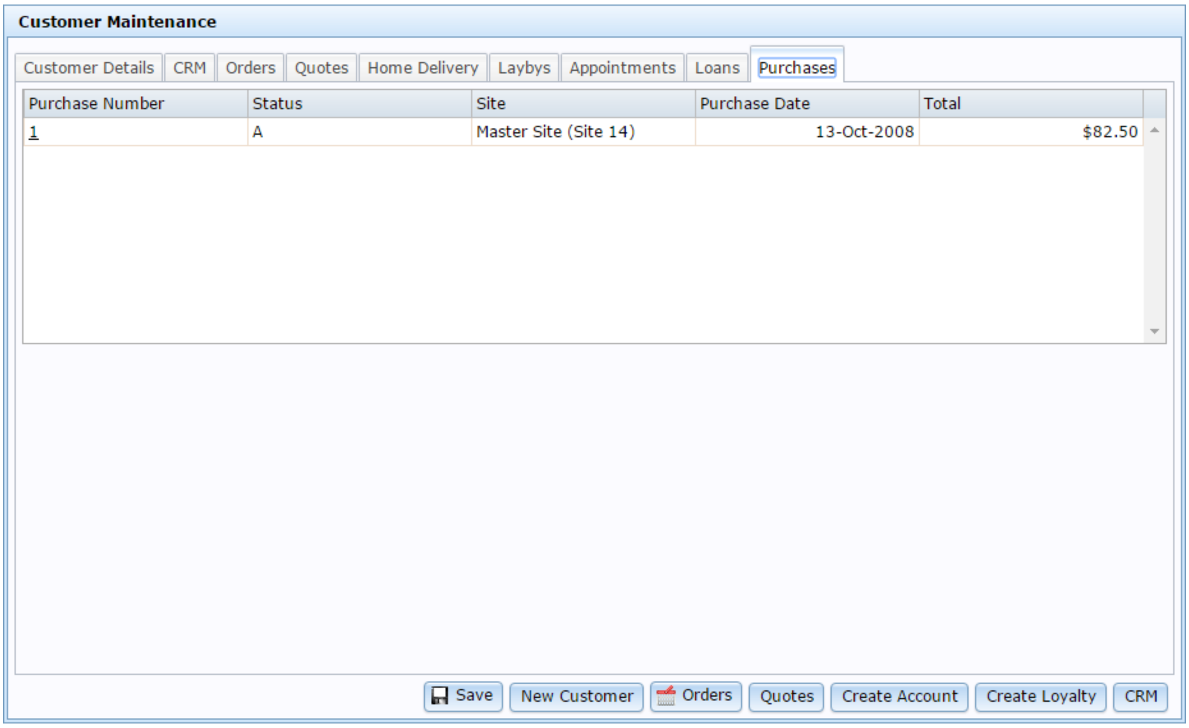
Use this area to maintain the customer's loans.



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.



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

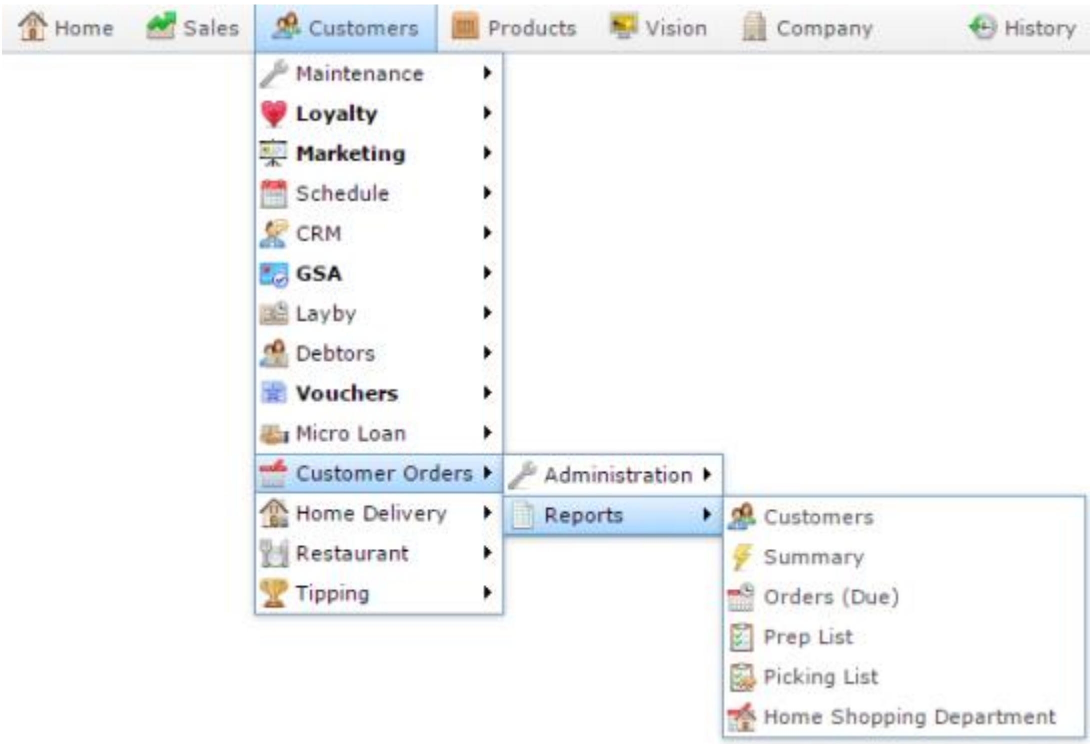
Use the Site Details report to view a list of customers by site.

Opening the Site Details report

To open the Site Details report:

1. Press 

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



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	9876543	9886432		info@app
Bird, Bob	Chadstor	This street	Waverley		3150	0411103			birdrc@y
Burberry,	Chadstor	91 Garden Ave, Gardenvi	VIC		3699	9998787			ABurberr
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@am

Site

Chadstone

Add to Favourites

Site 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.

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 / **Customer /** **Customer Name /** **Debtor**	Name of the debtor or customer.
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

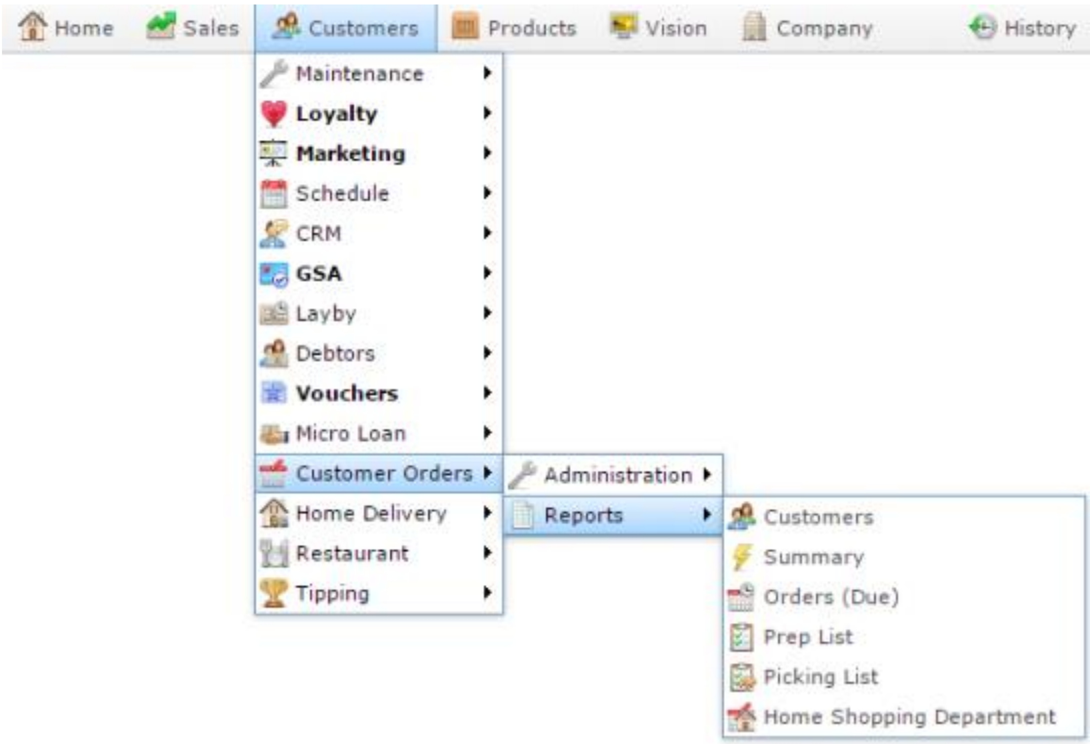
Use the Home Shopping Department report to view home shopping departments.

Opening the Home Shopping Department report

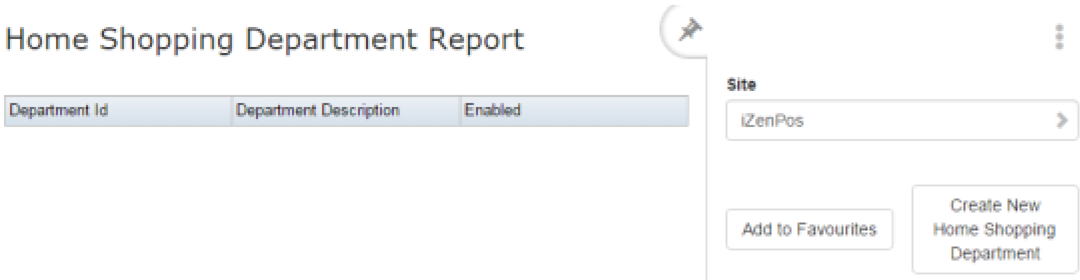
To open the Home Shopping Department report:

1. Press 

from the menu bar.
2. Press **Customer Orders > Reports > Prep List**.



The Home Shopping Department report is displayed.



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 / **Sites**	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
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.

Managing laybys

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.

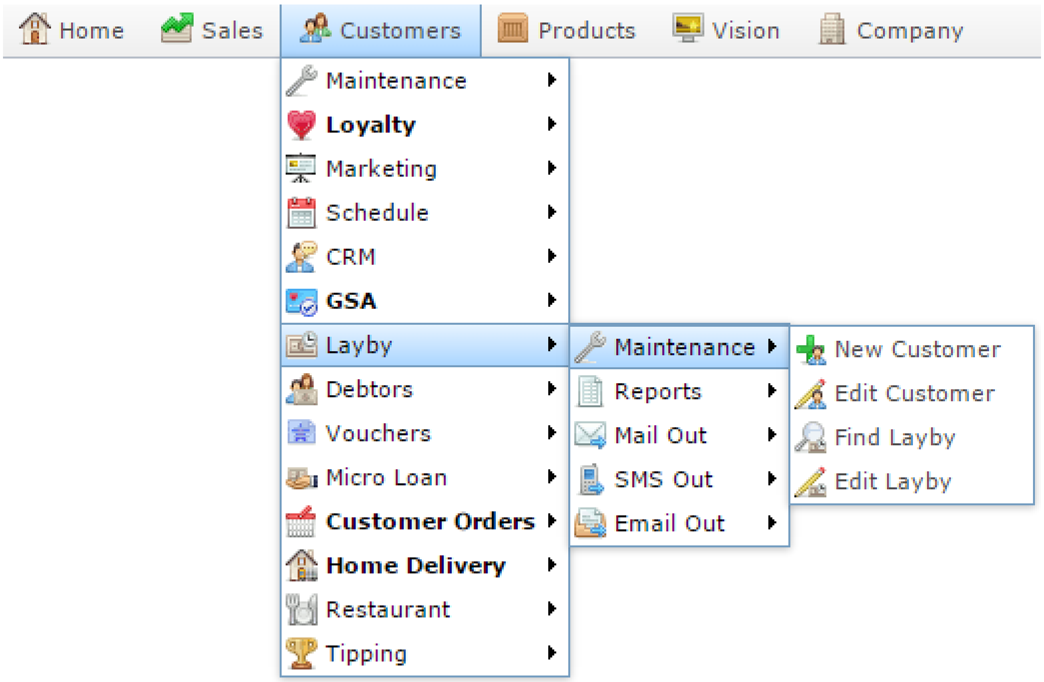
Editing a layby

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

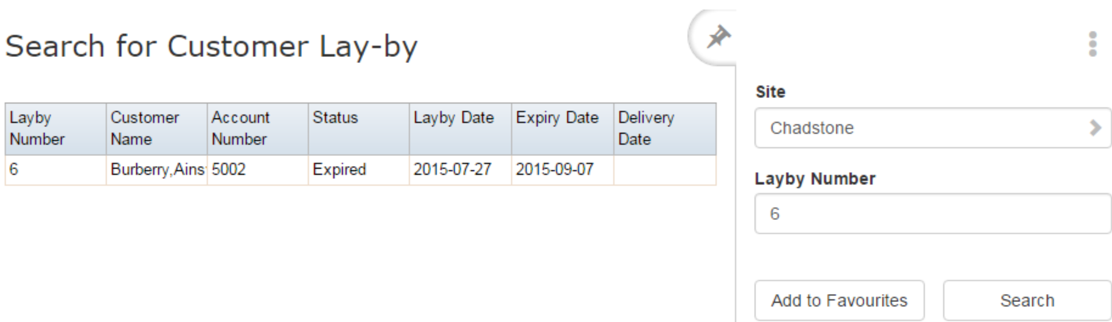
> **Note:** Laybys are created at the Point of Sale and signed by the customer. Editing the layby may invalidate the conditions signed. Only edit laybys to correct an error or if you are cancelling the layby.

To edit a layby:

1. Press  .
2. Press **Layby** > **Maintenance** > **Find Layby**.

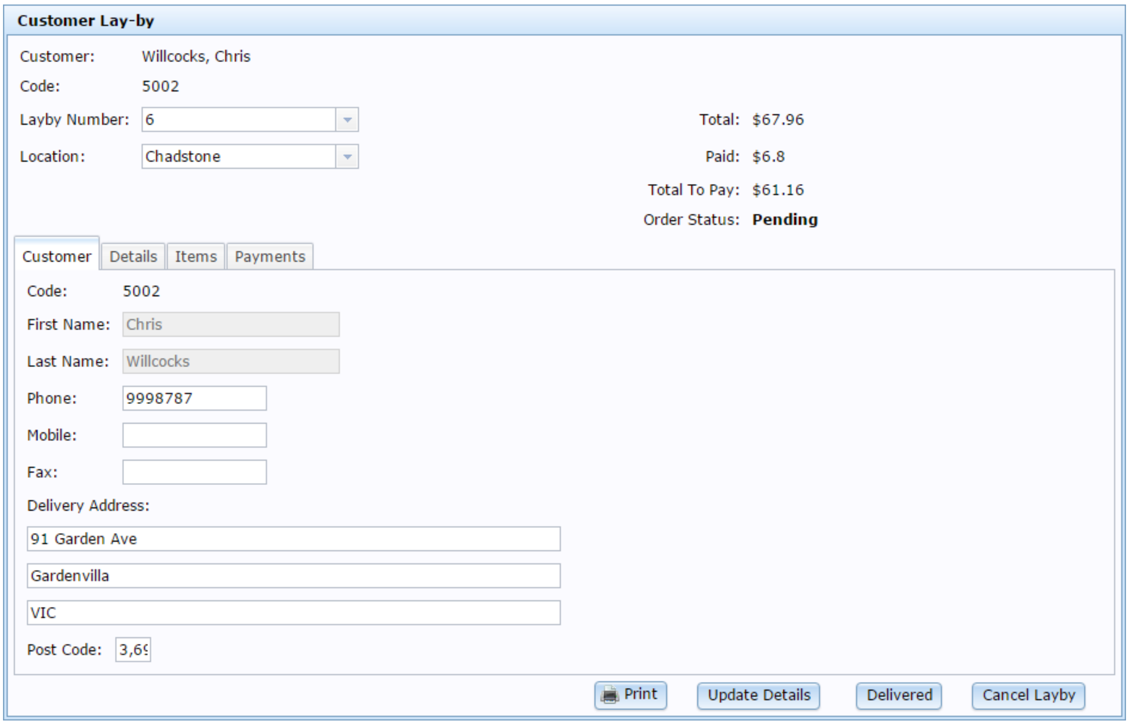


The Search for Customer Layby screen is displayed.



3. Search for the layby you want.

   The Customer Lay-by screen is displayed.



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

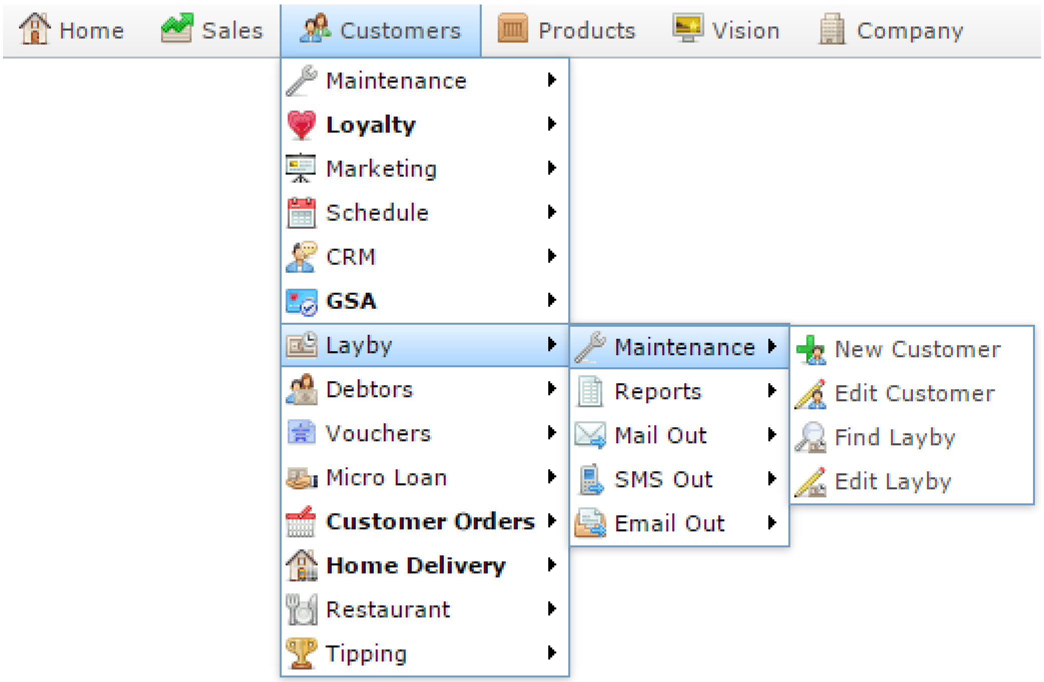
Add items to a layby to include them in the customer's purchase.

> **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.

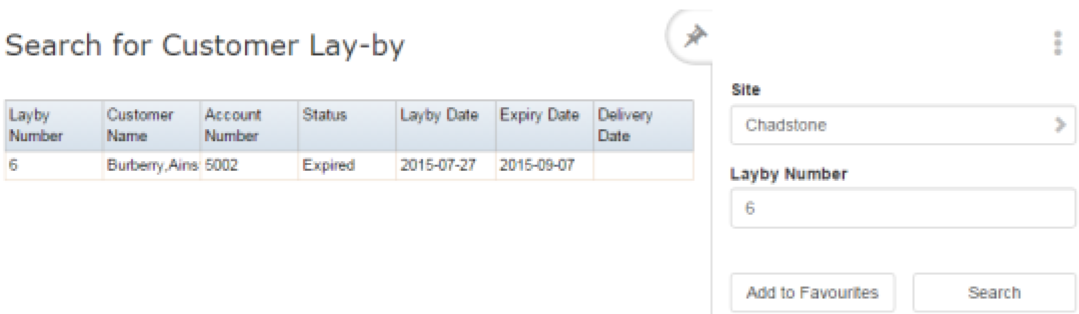
To add items to a layby:

1. Press 

.
2. Press **Layby** > **Maintenance** > **Find Layby**.

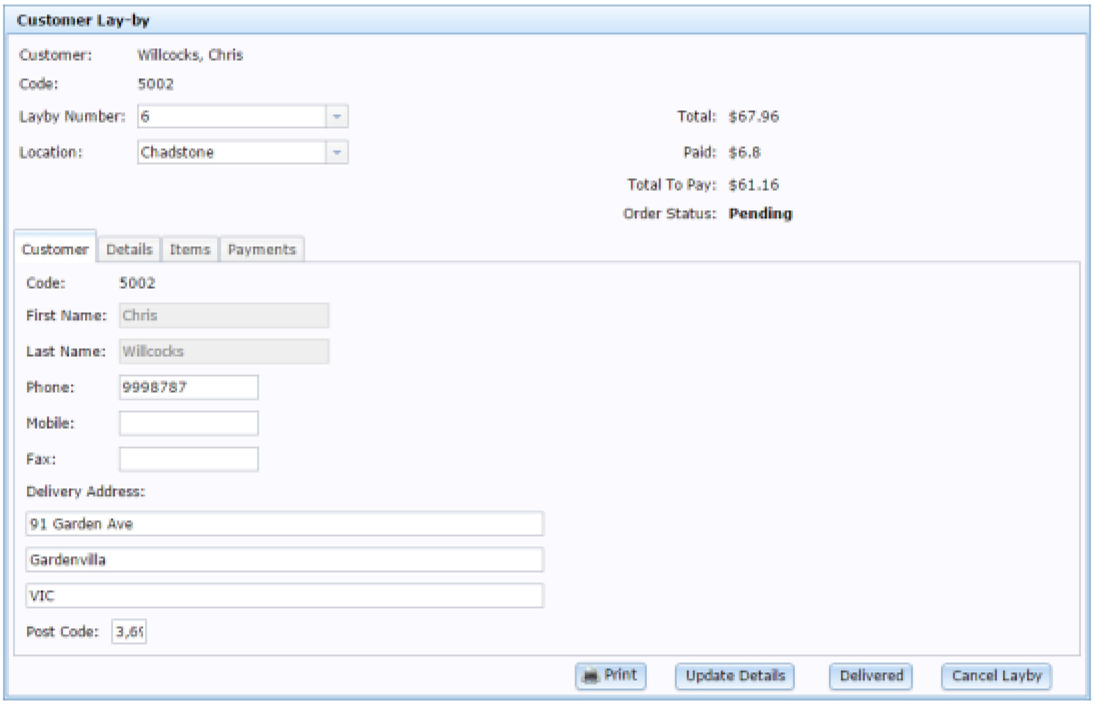


The Search for Customer Layby screen is displayed.



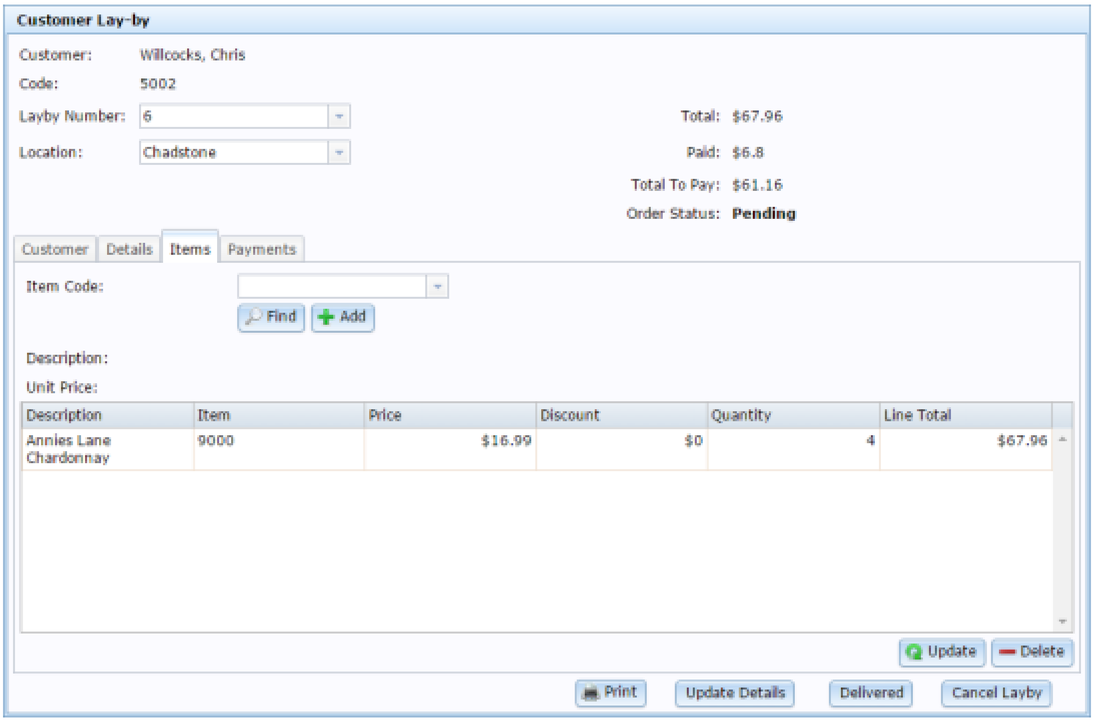
3. Search for the layby you want.

   The Customer Lay-by screen is displayed.



4. Press the Items tab.

   The items tab is displayed.



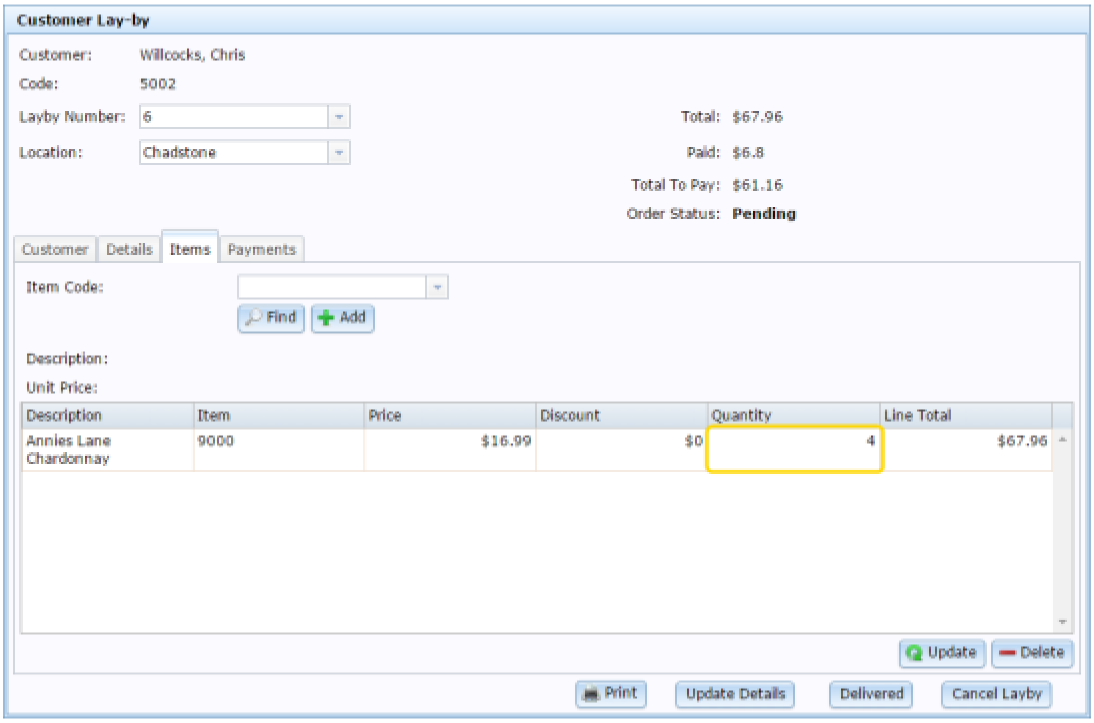
5. Search for the item you want to add in the **Item Code** field.

   See *Finding an item with a search field*.

6. Press .

The item is added to the item grid.

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



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

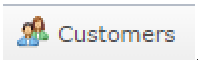
The changes are saved.

Changing the price of items in a layby

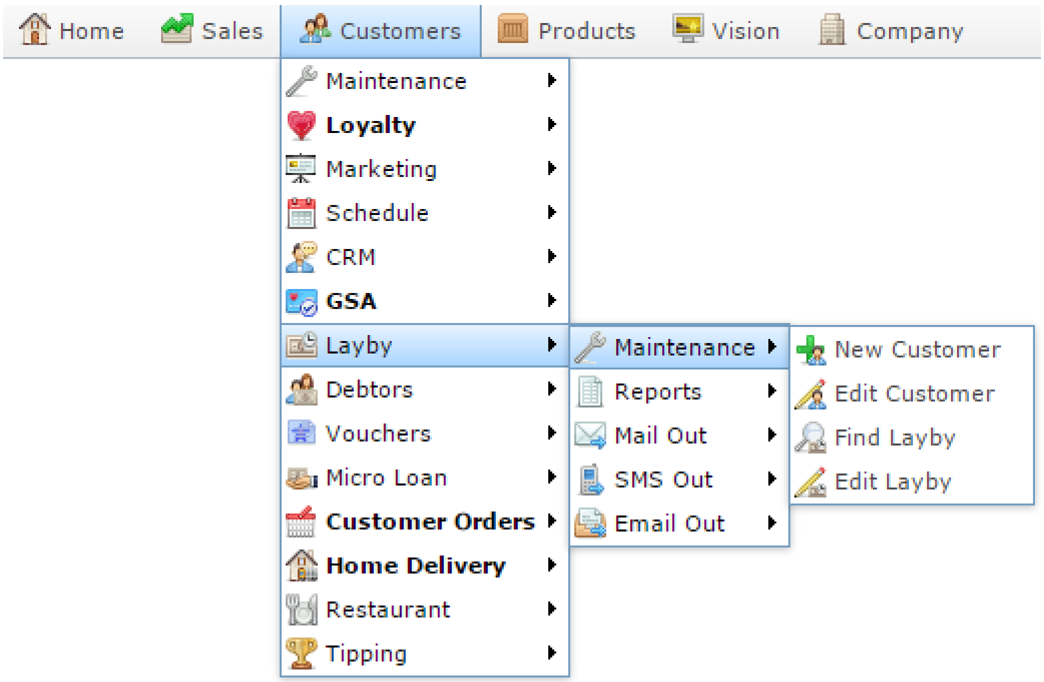
Change the price of items in a layby if you want to offer the customer a different price to the normal price they would receive.

> **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.

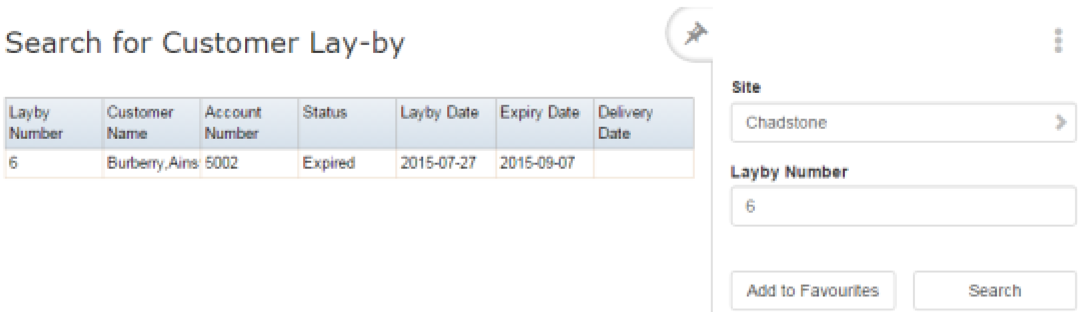
To change the price of items in a layby:

1. Press 

.
2. Press **Layby** > **Maintenance** > **Find Layby**.

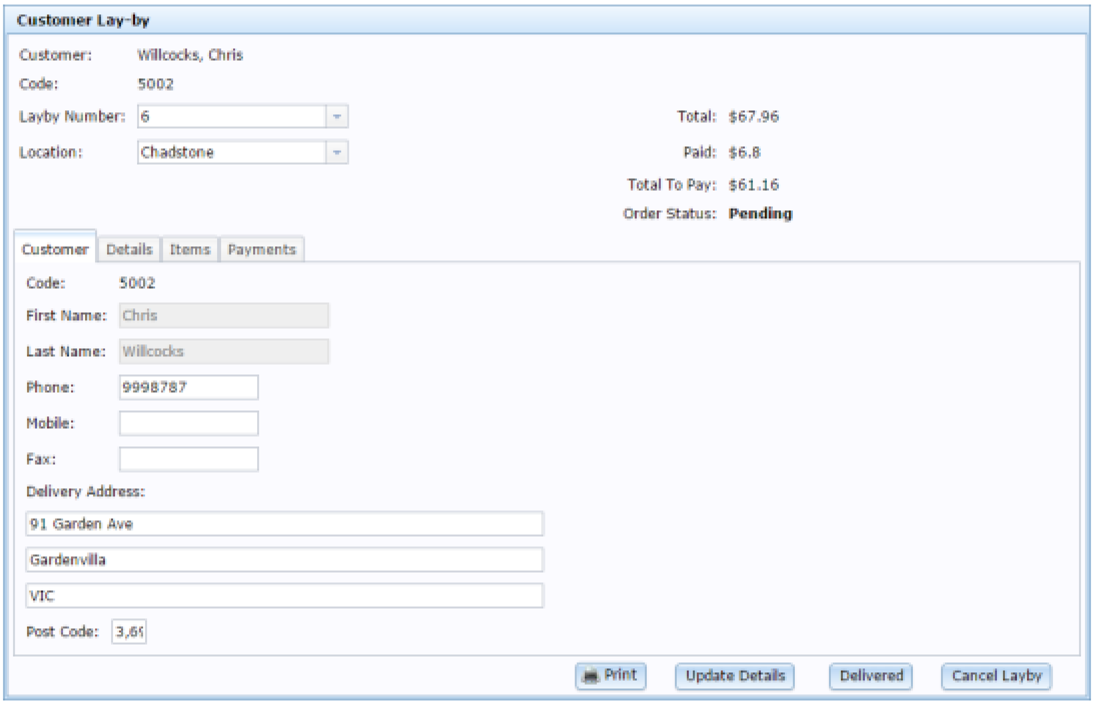


The Search for Customer Layby screen is displayed.



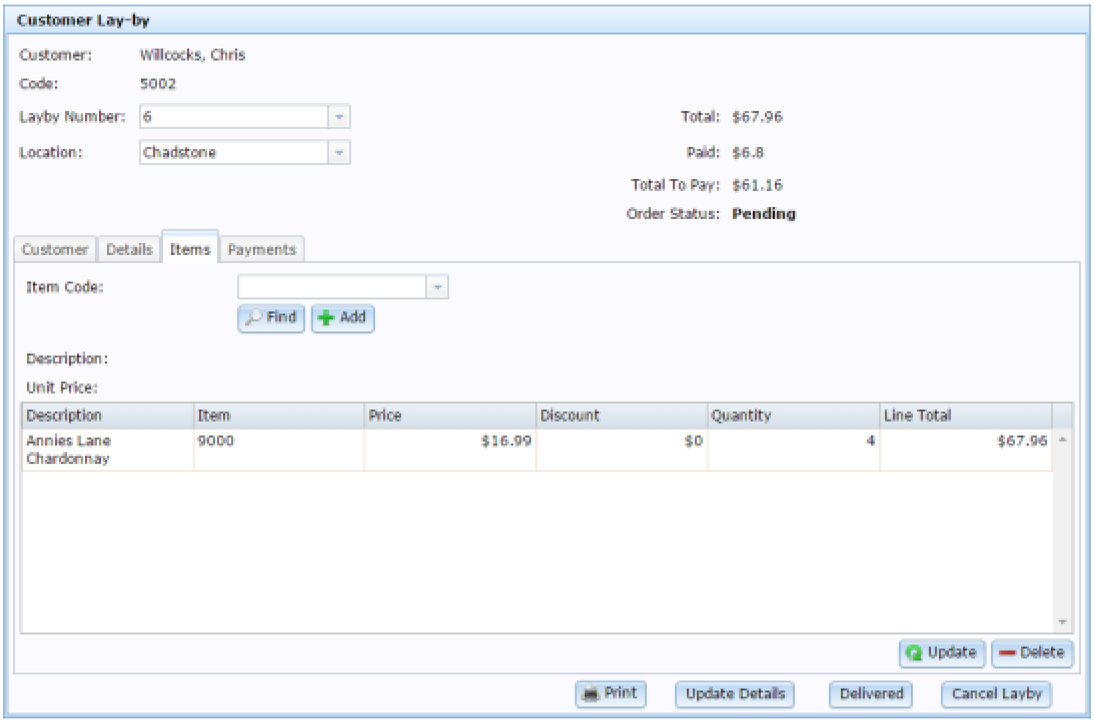
3. Search for the layby you want.

The Customer Lay-by screen is displayed.

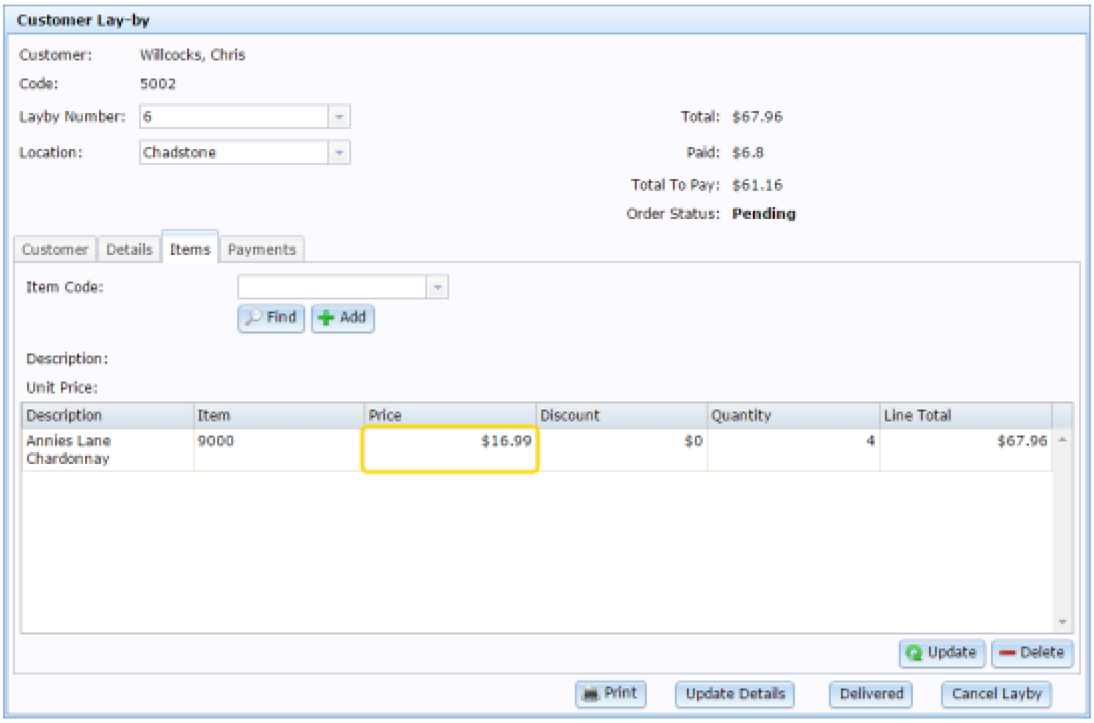


4. Press the Items tab.

   The items tab is displayed.



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



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

   The changes are saved.

Editing the quantity of items in a layby

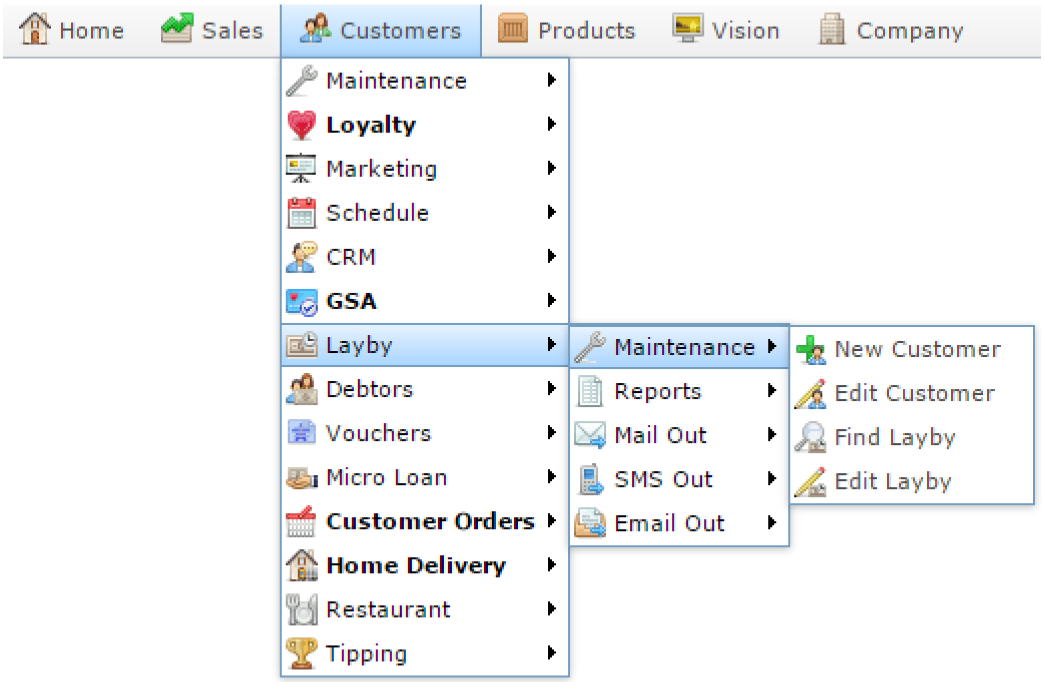
Edit the quantity of items to include more or fewer units of an item in a layby.

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.

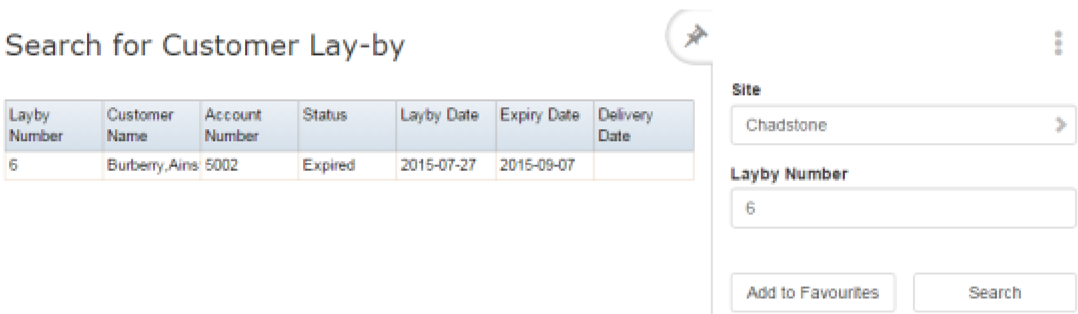
To edit the quantity of items in a layby:

1. Press 

.
2. Press **Layby** > **Maintenance** > **Find Layby**.

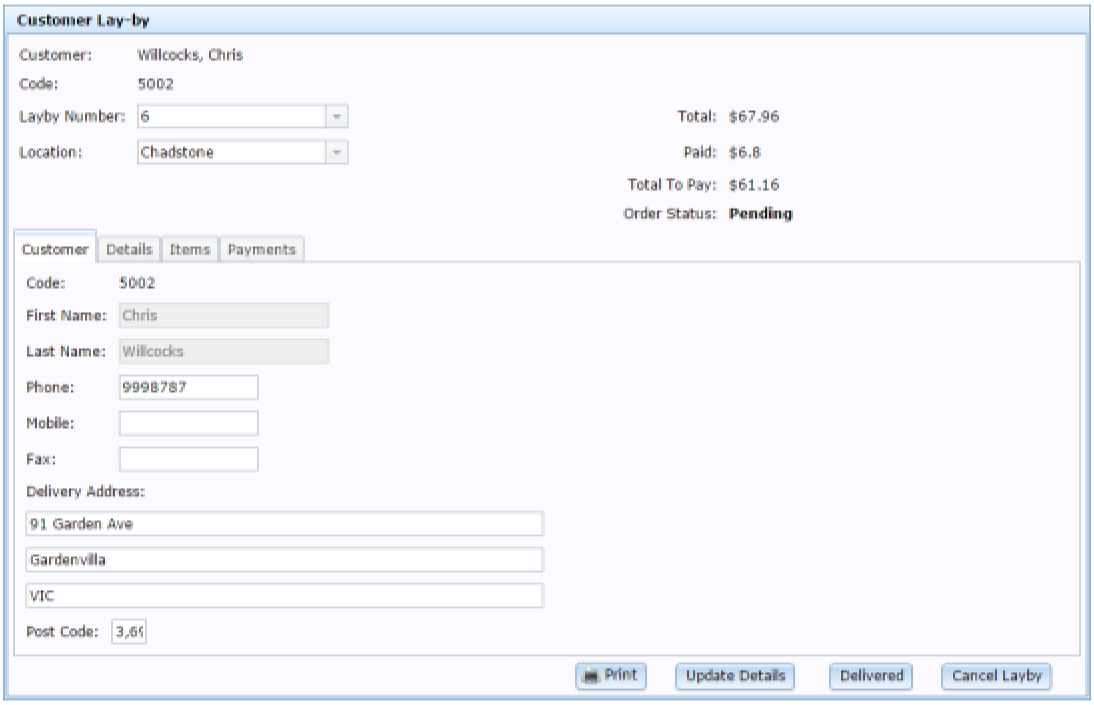


The Search for Customer Layby screen is displayed.



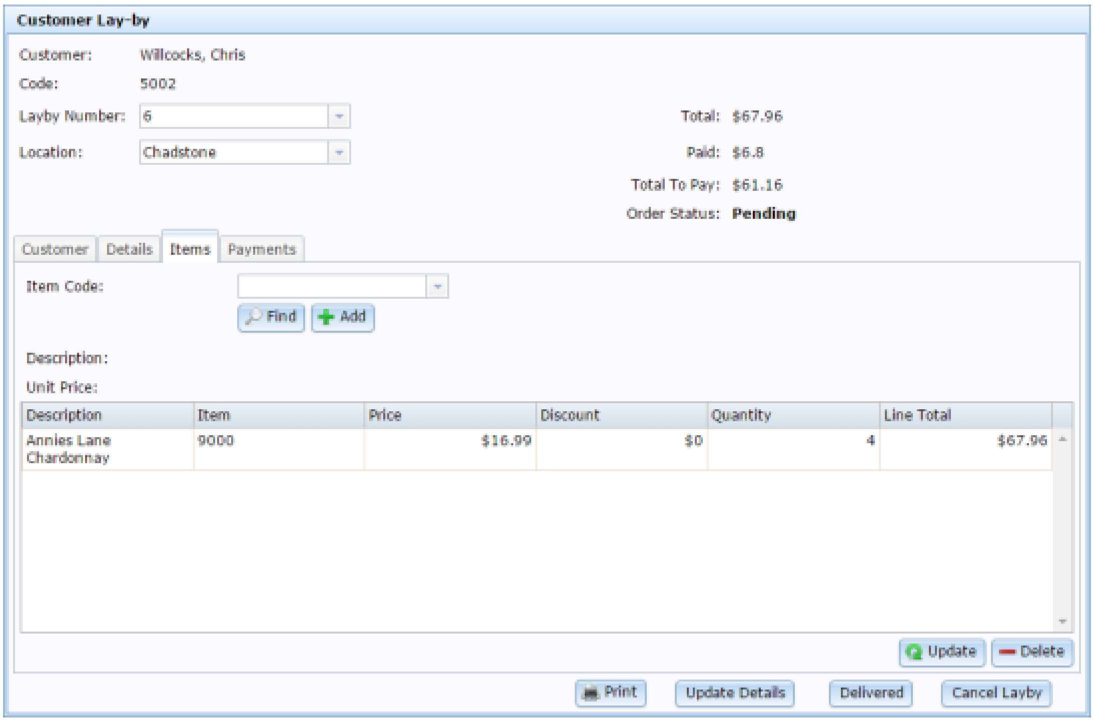
3. Search for the layby you want.

The Customer Lay-by screen is displayed.

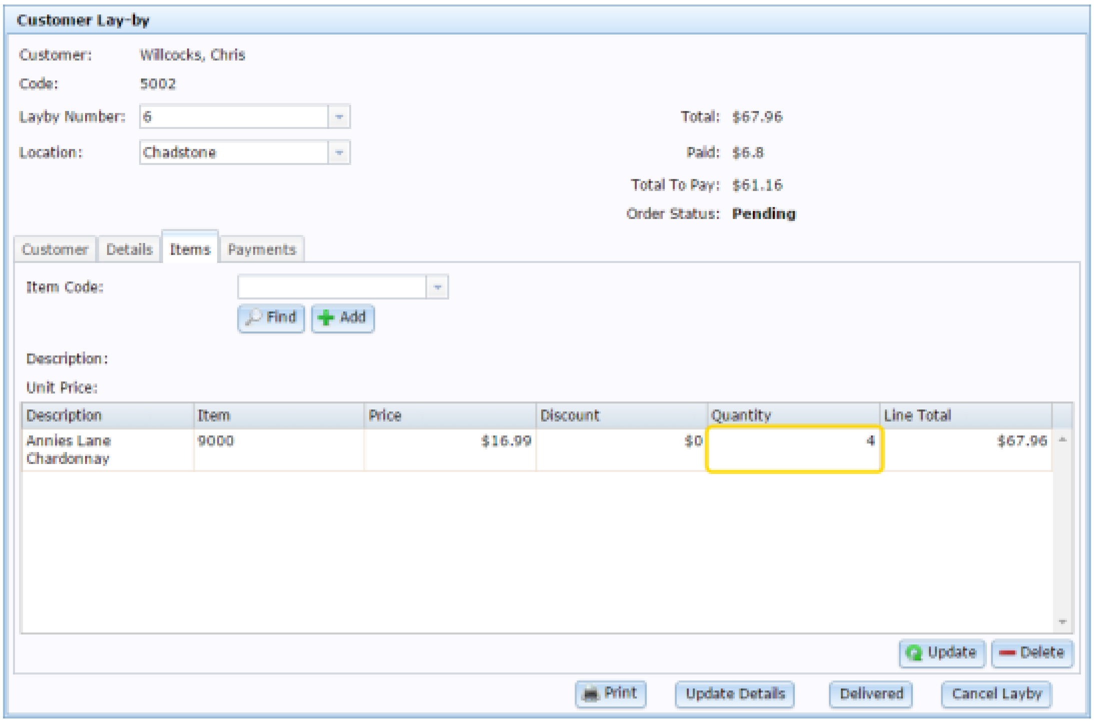


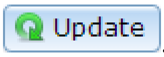
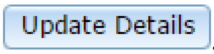
4. Press the Items tab.

   The items tab is displayed.



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



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

   The changes are saved.

Removing items from a layby

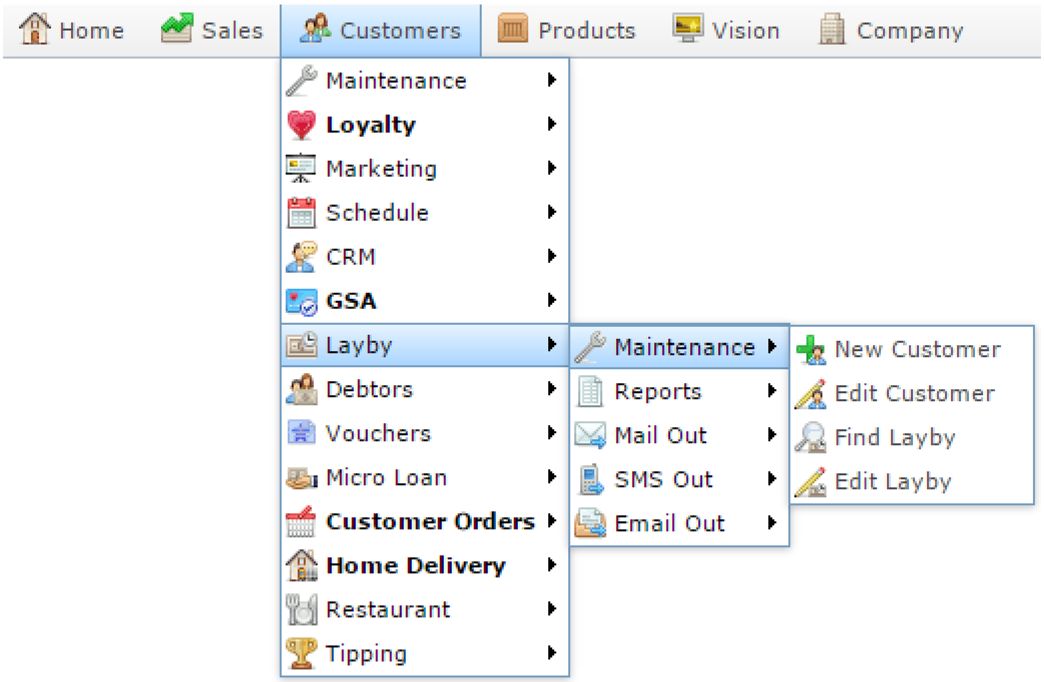
Remove items from a layby to remove them from the customer's purchase.

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.

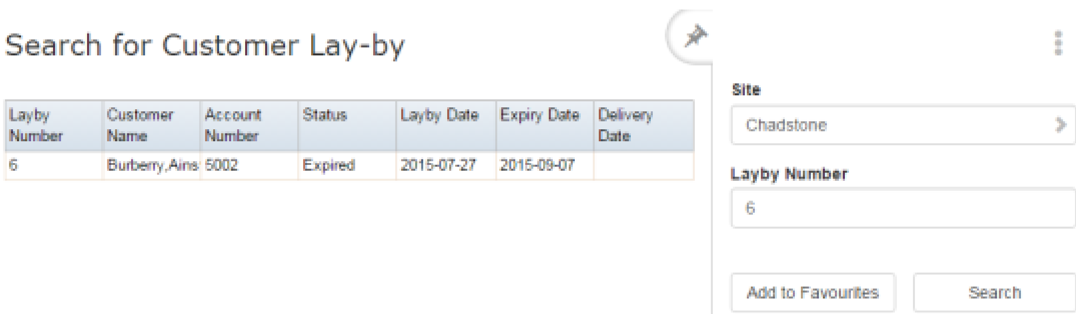
To remove items from a layby:

1. Press 

.
2. Press **Layby** > **Maintenance** > **Find Layby**.

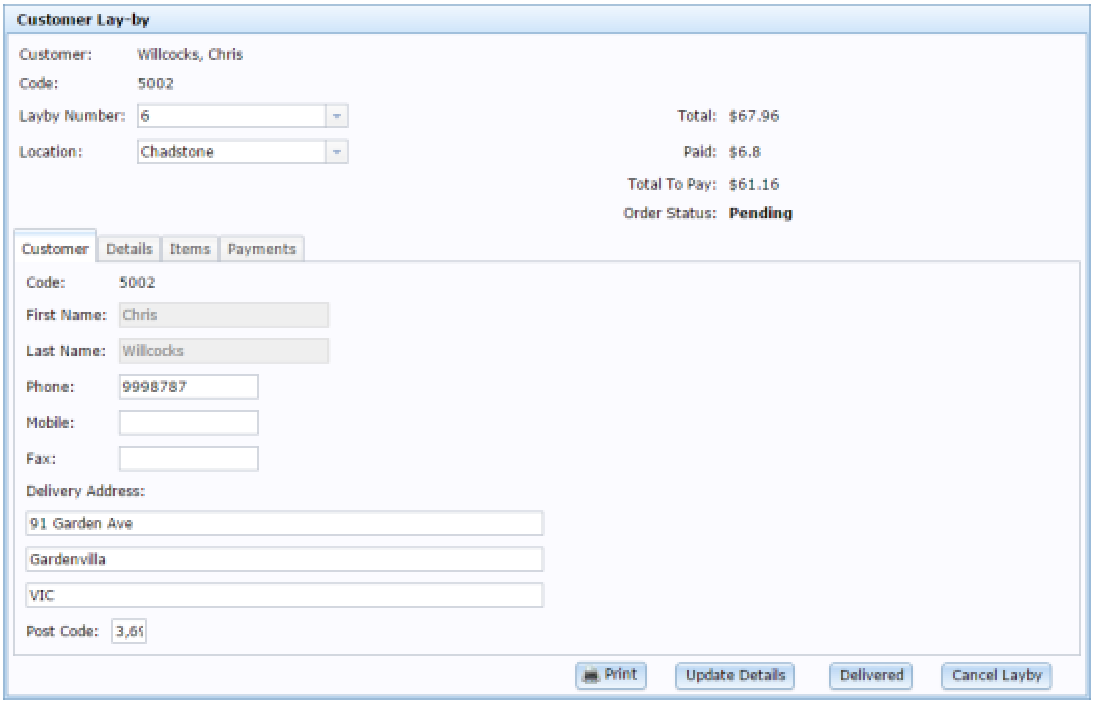


The Search for Customer Layby screen is displayed.



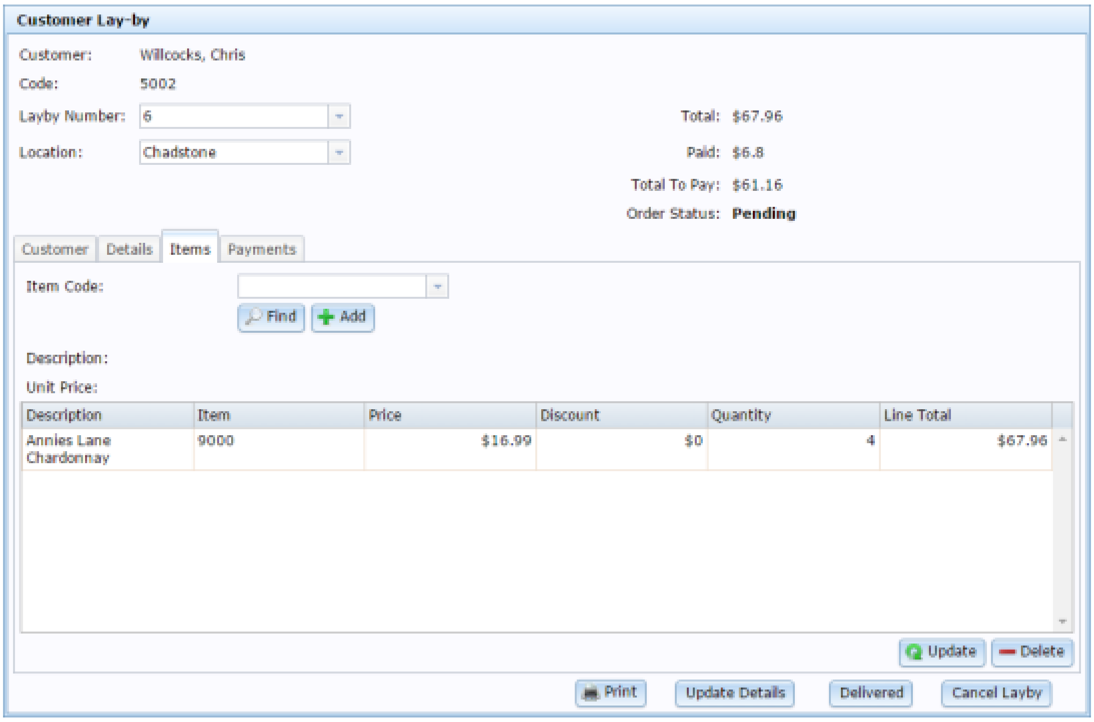
3. Search for the layby you want.

   The Customer Lay-by screen is displayed.

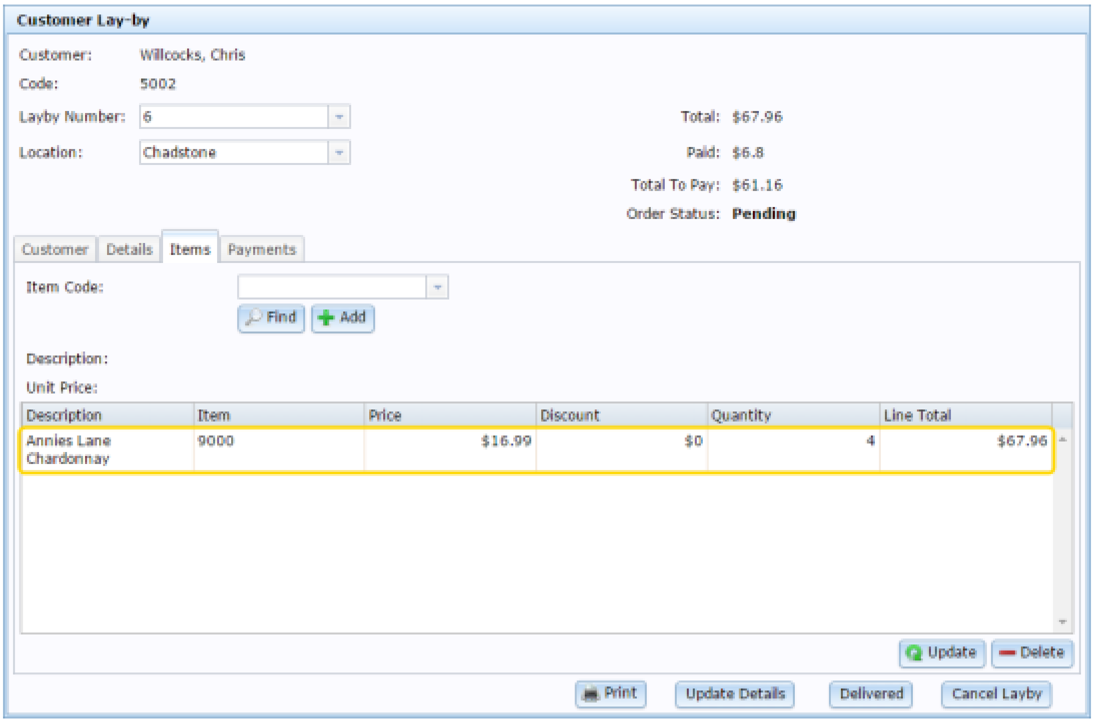


4. Press the Items tab.

   The items tab is displayed.



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



6. Press Delete.
7. Press Update Details.

   The changes are saved.

Delivering a layby

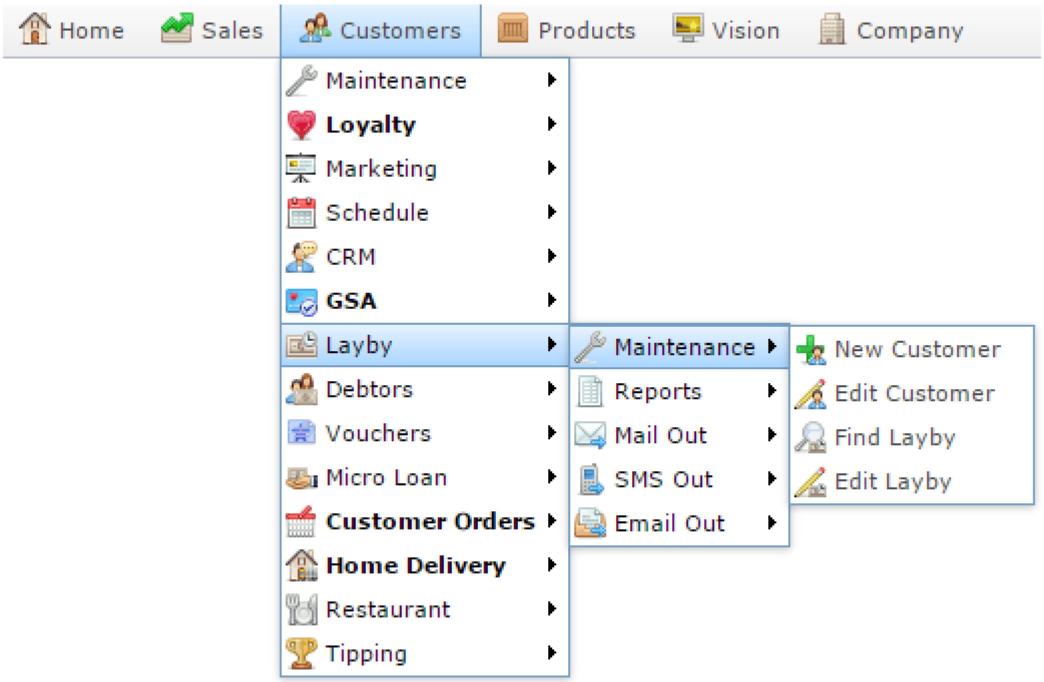
Mark a layby as delivered if you have completed payment and the customer has received the items.

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

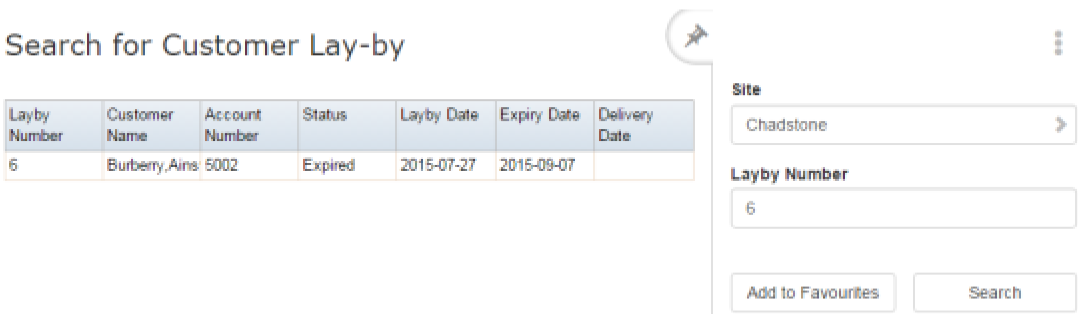
To deliver a layby:

1. Press 

.
2. Press **Layby** > **Maintenance** > **Find Layby**.

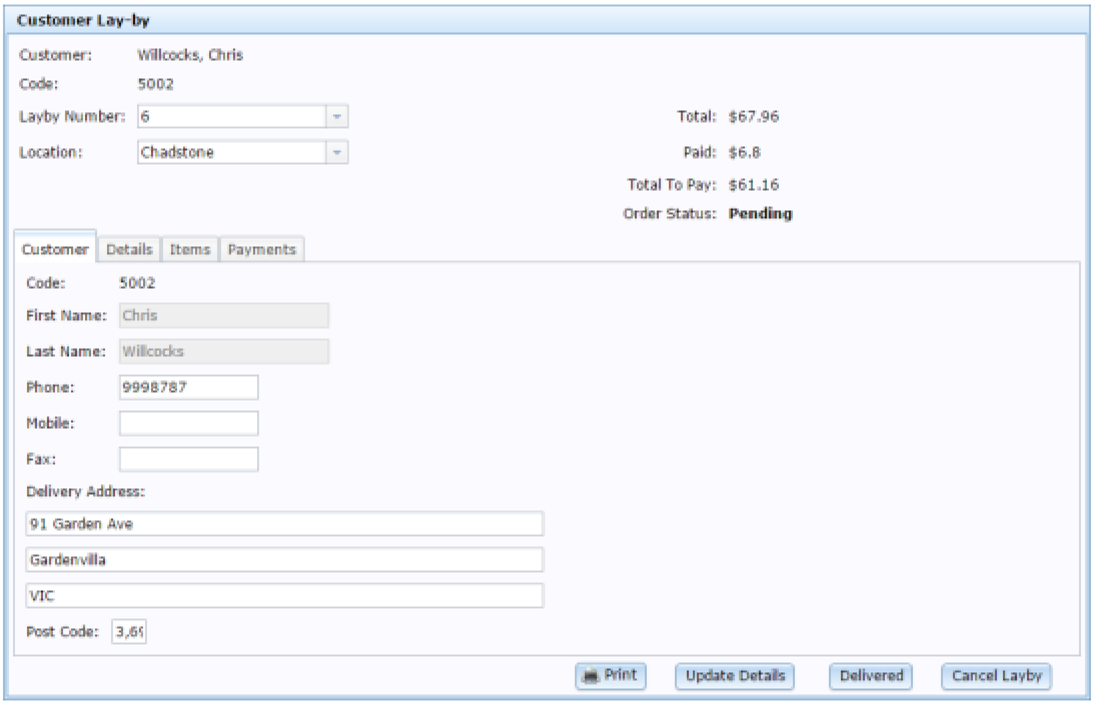


The Search for Customer Layby screen is displayed.



3. Search for the layby you want.

   The Customer Lay-by screen is displayed.



4. Press Delivered.

   The layby is delivered.

Cancelling a layby

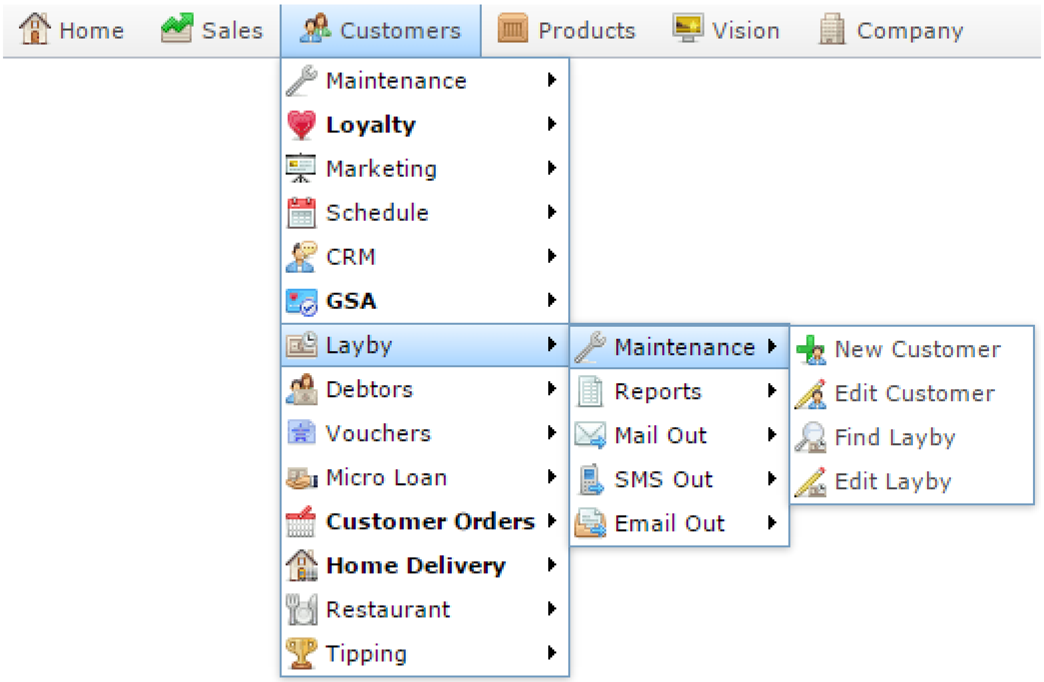
Cancel a layby to remove it from the Portal.

> **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.

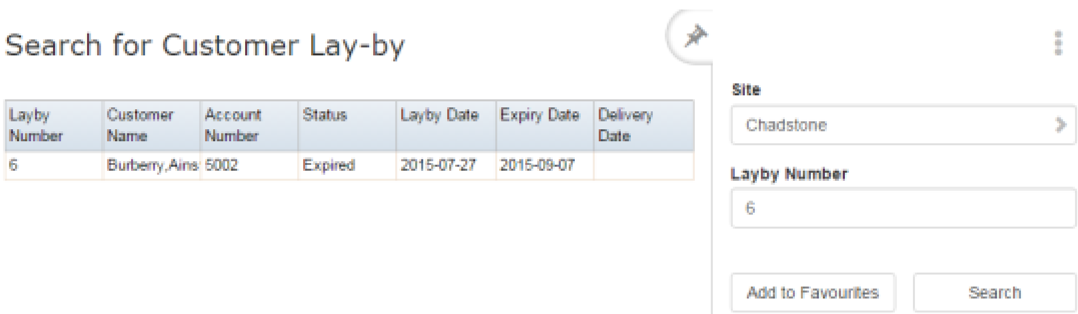
To cancel a layby:

1. Press 

.
2. Press **Layby** > **Maintenance** > **Find Layby**.

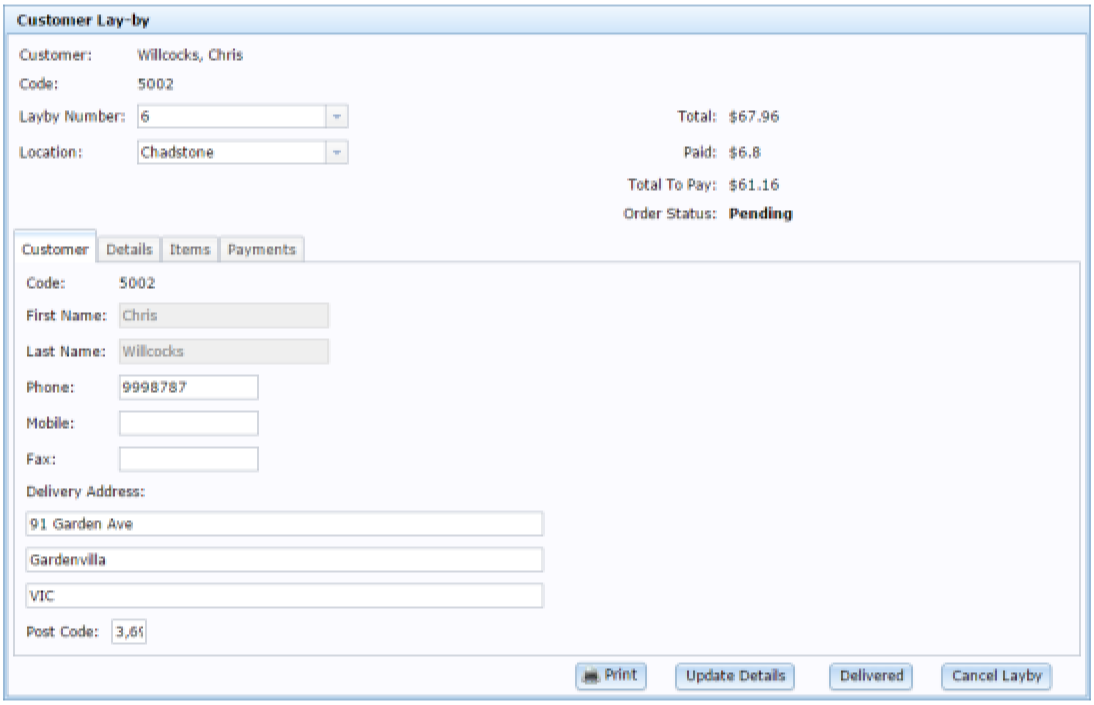


The Search for Customer Layby screen is displayed.



3. Search for the layby you want.

   The Customer Lay-by screen is displayed.



4. Press Cancel Layby.

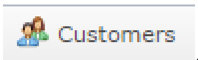
The layby is cancelled.

Customer Lay-by screen

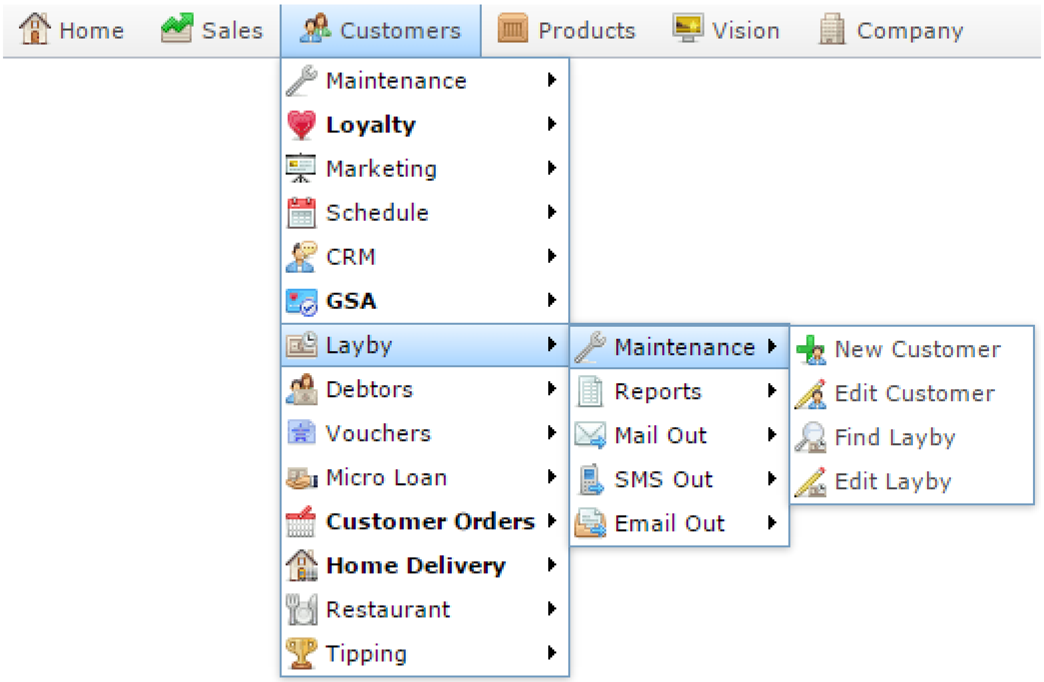
Use this screen to edit and create laybys.

Opening the Customer Lay-by screen

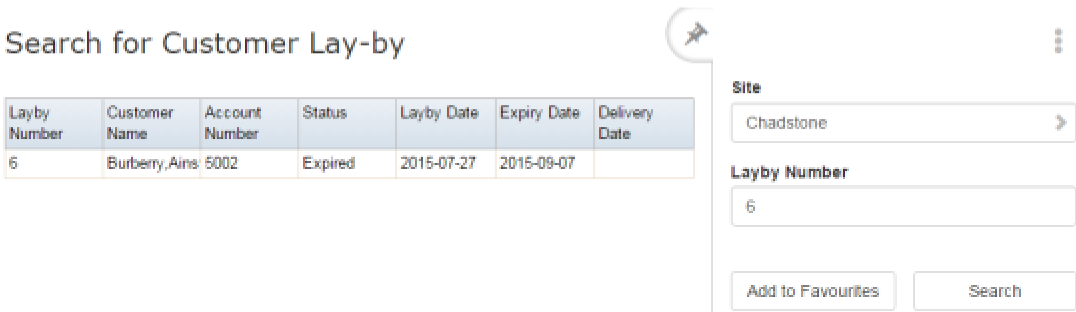
To open the Customer Lay-by screen:

1. Press 

.
2. Press **Layby** > **Maintenance** > **Find Layby**.

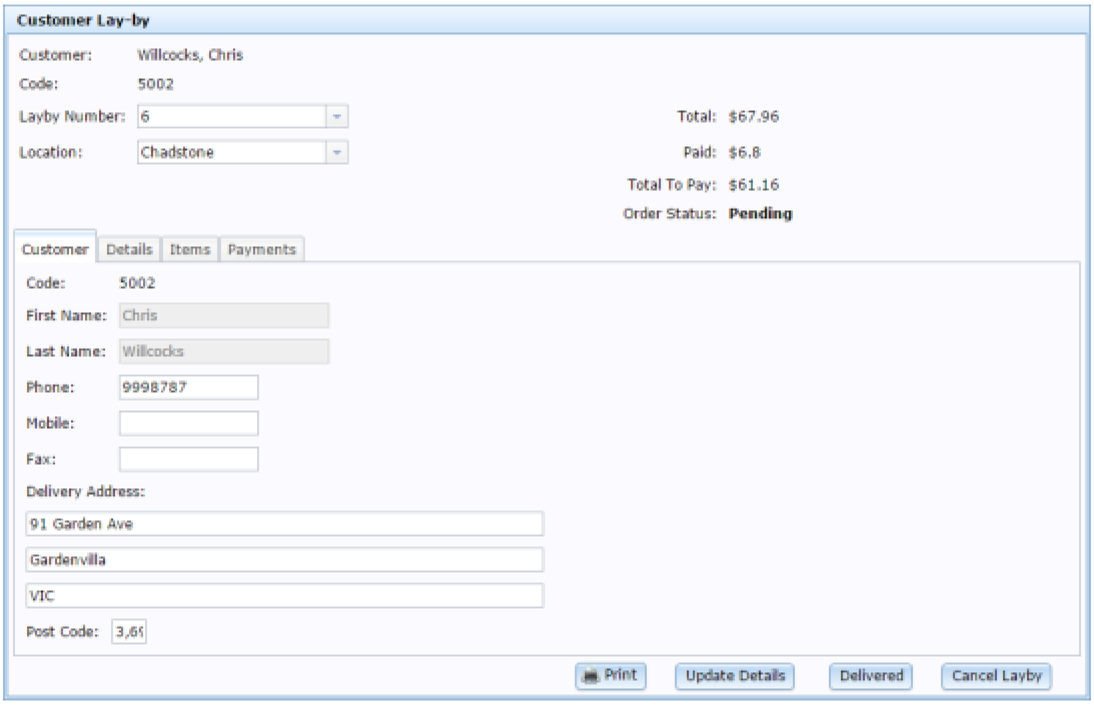


The Search for Customer Layby screen is displayed.



3. Search for the layby you want.

   The Customer Lay-by screen is displayed.



Customer Lay-by screen key fields and buttons

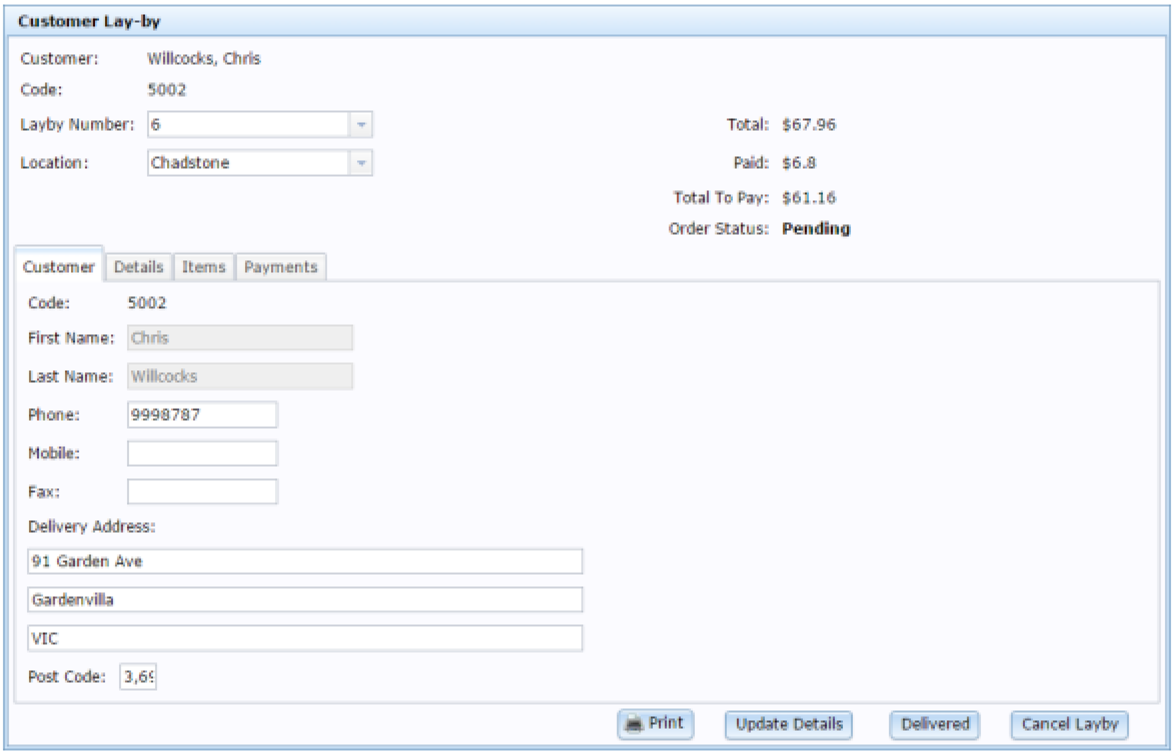
Common fields and buttons

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, **Expired** or **Pending**.
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.

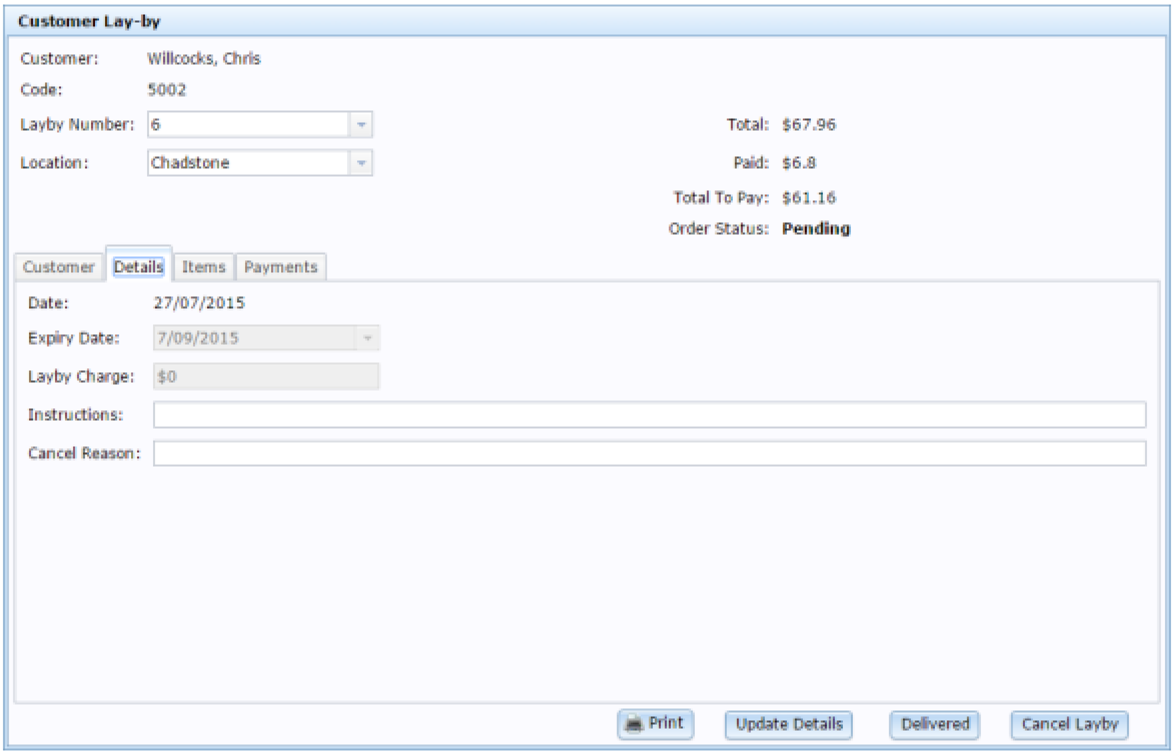


Field	Description
Code	Code identifying the customer.
First Name	Customer's first name.
Last Name	Customer's last name.
Phone	Customer's preferred phone number.
Mobile	Customer's mobile phone number.
Fax	Customer's fax number.
Delivery Address	Customer's delivery address.

Field	Description
Post Code	Customer's post code.

Details tab

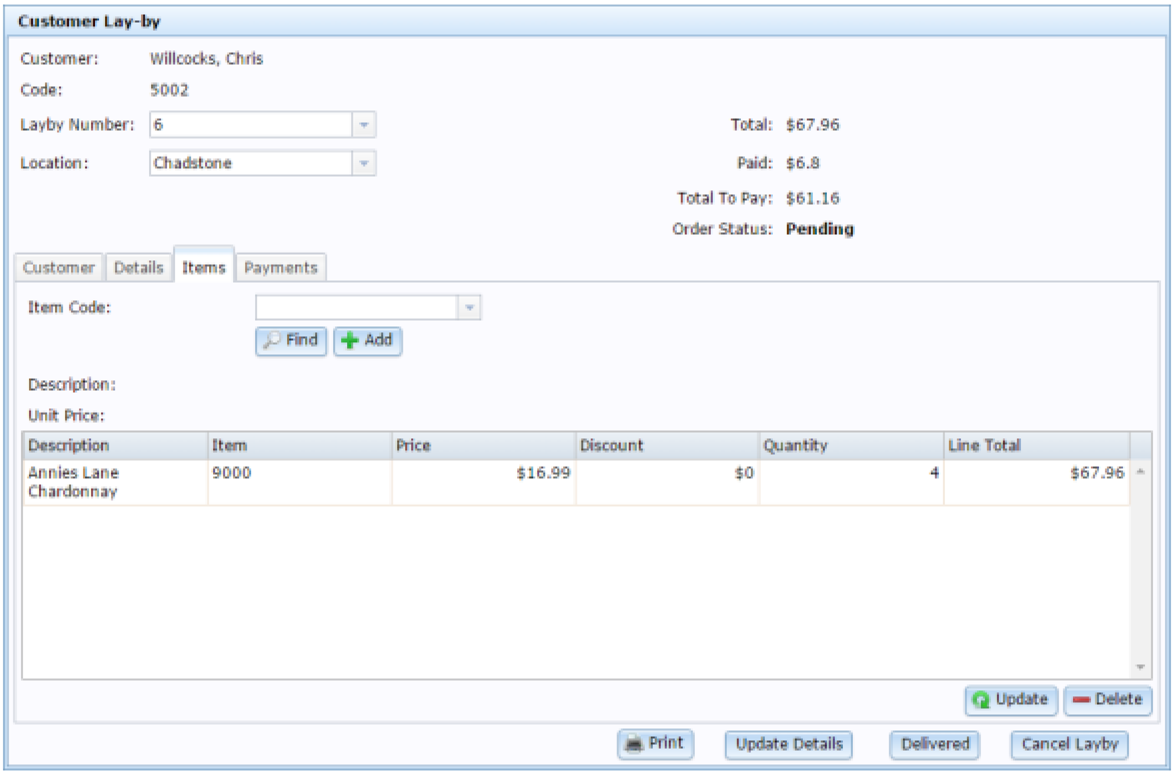
Use this area to maintain the layby dates and instructions.



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.



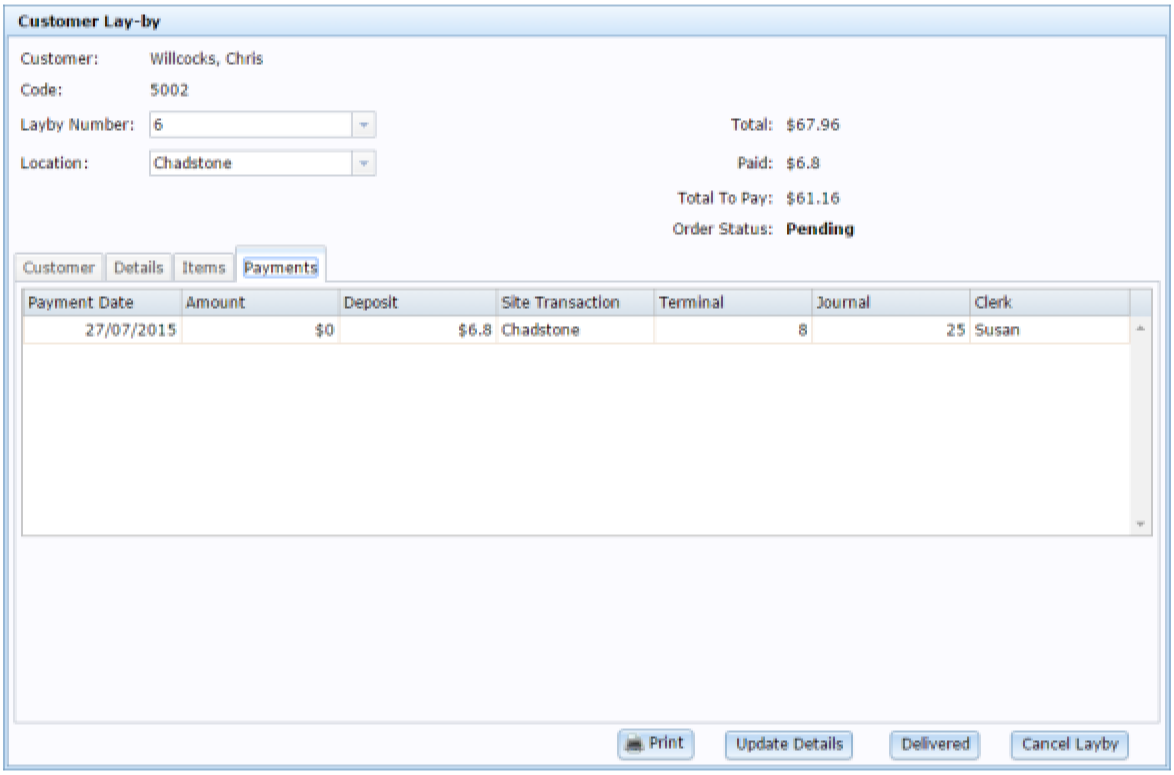
Field	Description
Item Code	Search for an item to add to the layby. See *Finding an item with a search field*.
Description	Description of the selected item.
Unit Price	Unit price of the selected item.
Update	Save any changes made to the list of items in the layby.
Delete	Delete the selected item from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



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

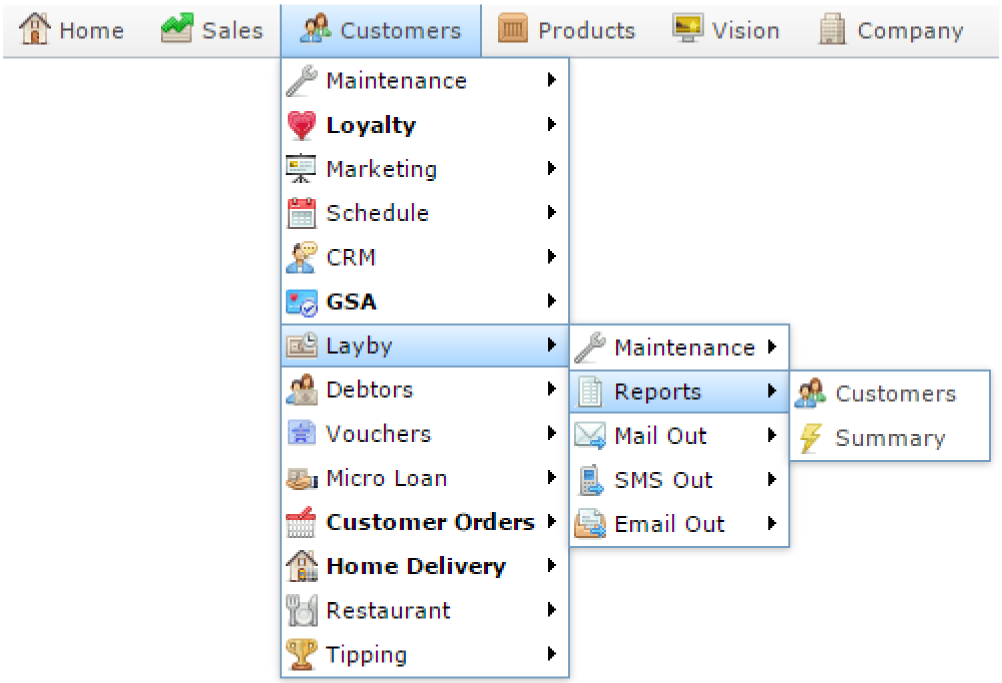
Use the Customer Layby report to view existing laybys.

Opening the Customer Layby report

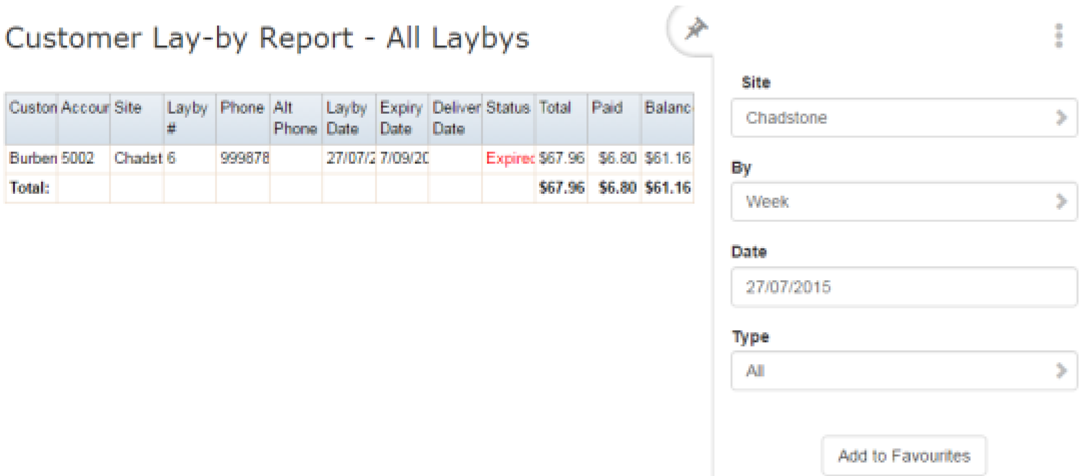
To open the Customer Layby report:

1. Press  from the menu bar.

2. Press **Layby** > **Reports** > **Summary**.



The Customer Layby report is displayed.



Custon	Accour	Site	Layby #	Phone	Alt Phone	Layby Date	Expiry Date	Deliver Date	Status	Total	Paid	Balanc
Burben	5002	Chadst	6	999878		27/07/2	7/09/20		Expirec	$67.96	$6.80	$61.16
Total:										$67.96	$6.80	$61.16

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 / **Sites**	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 / Customer / Customer Name / Debtor	Name of the debtor or customer.
Customer ID / Customer	Unique code identifying the 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.

Field	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

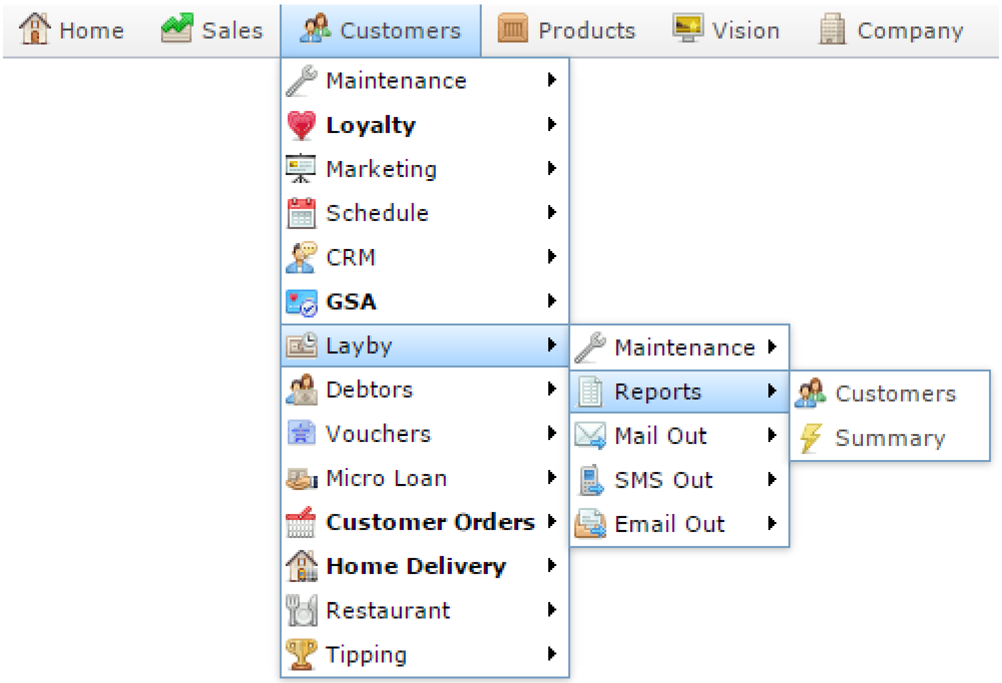
Use the Layby Customer Details report to view the details of customers with laybys.

Opening the Layby Customer Details report

To open the Layby Customer Details report:

1. Press 

from the menu bar.
2. Press **Layby** > **Reports** > **Customers**.

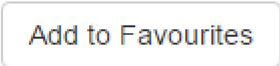


The Layby Customer Details report is displayed.

Layby Customer Details 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.
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 /** **Start Date and End Date**	Select the date or date period to report on.

Field	Description
Type	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 / Description	The name of the relevant site.
Name / Customer / Customer Name / Debtor	Name of the debtor or customer.
Customer ID / Customer	Unique code identifying the 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 in-built scanner that can interact with the Portal to sell, order or count stock via the PDT software interface. PDTs are registered as terminals for a site, just as full Point of Sale terminals are, and require operators to log in to use them.

Portal Data Interchange (PDI)

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

Permission

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

Portal operator

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

Point of Sale operator

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

Point of Sale supervisor

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

Price change

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

Price level

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

Prime item

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

Procurement

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

Promotion

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

Promotion group

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

Purchase order

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

Rebate

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

Rebate group

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

Rebate item group

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

Receipt

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

Referral

A referral is a connection between two items in your inventory, where one is considered part of the other. For example, if your inventory tracks both individual cans of 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.

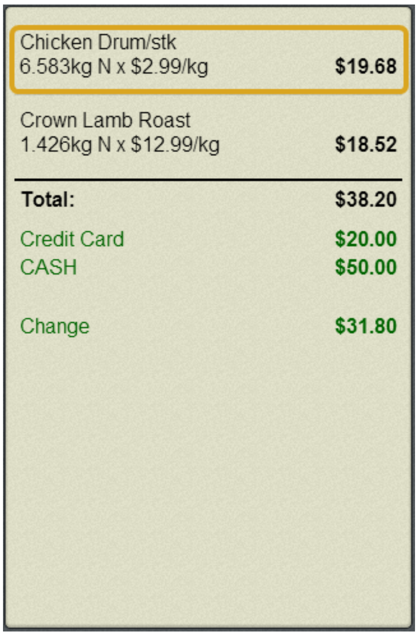
- The loyalty number linked to the transaction, if applicable.

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.



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.