

# TOTAL CONTROL PREMIER

## Database Setup Manual



Version: 1.0

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## **Introduction**

### **Introduction to Total Control Premier**

Total Control Premier (TCP) is designed to streamline your business by allowing the maintenance of products, clerks, stock, and promotions.

Total Control Premier also has a comprehensive range of reports for both sales information, and stock information.

### **Who Should Read This Manual**

This manual covers the basic set up and maintenance of the essential parts of Total Control Premier. This manual assumes the hardware is already set up, and the software installed, and so does not cover these topics. This manual should be read by the people who will be using the software on a regular basis.

## Tax Rates

### Introduction to Tax Rates

The sales, profit and tax reports within Total Control Premier requires that each individual product is allocated a tax rate.

The “Tax Rates” screen is used to setup the required rates to which all your products will then be linked.

Generally code 1 will be used for the standard tax rate (currently at 20% in the United Kingdom), code 2 could be set for zero rated items, code 3 for tax exempt items and code 4 for other rates such as fuel and children’s clothing etc.

The rates used here are completely customisable and there is no limit to the total number of tax rates held by the system (although it is NOT recommended to go above 32, as this is the maximum number of tax codes available on GPOS).






If in doubt please consult your accountant.

### Accessing the Tax Rates Screen

The tax rates screen can be accessed via  General Databases ^ then  Other

### The Tax Rates Screen (An overview)

Below is a screenshot of the tax rates screen.

Tax Settings		
 Add  Edit  Delete  Print		
Drag and Drop Column Header(s) here to Group the data		
Code	Description	Tax Rate
=		=
0	No Tax Defined	0
1	Standard Tax	20
2	Exempt	0

## Tax Rates (Continued)

### Adding and Editing Tax Rates

When adding/editing tax rates the following fields are available:-

- **Code** - (Shows on reports and when associating a product with a tax rate. When adding a new tax rate, the system will automatically generate the next available free code).
- **Description** - (Shows on reports and when associating a product with a tax rate)
- **Tax Rate** - (The rate of tax, 20% etc.)

#### *To Add a Tax Rate*

1. Click 'Add'
2. Enter the details required
3. Click 'Save'

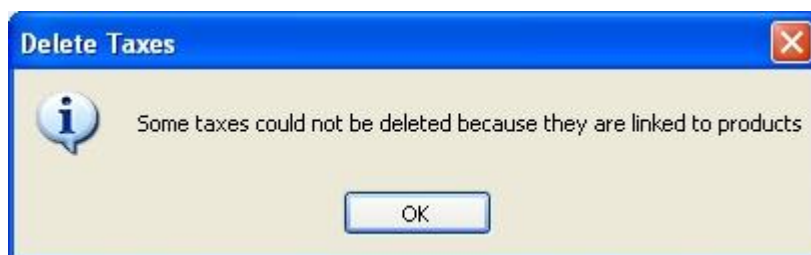
#### *To Edit a Tax Rate*

1. Select the required tax rate by clicking on the row in the grid
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

#### *To Delete Tax Rates*

1. Select the required tax rate by clicking on the row in the grid
2. Click 'Delete'
3. You will be prompted to confirm deletion (Click 'Yes')

**Note:** You cannot delete tax rates that have products associated with them. Attempting to do so will result in a prompt.



## Tax Rates (Continued)

### Printing Tax Lists

A 'Tax List' can be printed showing the details of your tax rates.

#### *To Display Or Print a 'Tax List'*

1. Click 'Print' button
2. Select to 'Display' or 'Print' the list

#### **Example1:** A Tax List

03/09/2014		<b>Tax List</b>		Page 1 of 1
<u>Code</u>	<u>Description</u>			<u>Rate</u>
1	Standard Tax			20.00%
2	Exempt			0.00%
3	Non VAT			0.00%
4	5% VAT			5.00%

### Tax Rate Reports

There are a variety of reports which make use of the information entered against Tax Rates.

Including for Example:

- **Tax Report By Payment Key**
- **Payment Key By Tax Code**
- **Product By Tax Report**
- **Tax Report By Line Value**
- **Tax Report By Total Value**
- **Tax Report By Major Group**
- **Sales Summary (Inc Tax. And Media)**
- **Sales Information (Inc Tax. And Media)**
- **Tax Report By Group**

General options that affect: Tax Rates			
Category	Subsection	Title	Description
General Options	Realtime GPoS	Enable Tax Reporting By Media	With this set to 'True', you can produce tax reports on your media (payment) keys. Please note that in a split payment transaction, the tax will be apportioned across the payment keys used.
Stock Options	General Stock	Use As Standard Tax	Setting a single tax code as the 'standard' rate allows this rate to be overridden at the point of saving a stock transaction. This is only required when the tax rate changes. If a tax rate changes, you will update the tax rate in the tax rates screen, however any order placed before the tax rate change, will require you to override this rate with the old (original) tax rate.

## Stock Keeping Units

### Introduction To Stock Keeping Units.



Stock Keeping Units (SKU's) are basically the pack size. For example 'baked bean tins' are sold individually but may come in a case of 48. Wine is sold by the glass but there may be six glasses from each bottle. When entering stock transactions, you will probably want to enter the data in packs (e.g. 3 Cases, rather than 144 units). Each SKU contains the number of selling units within it, for example a 'dozen' will contain 12 units.

From a reporting point of view the sales quantities show both the individual units sold as well as the SKU total. Eg Pints and gallons, units and cases.

SKU's also aid operations such as ordering, stocktakes, and deliveries, as quantities can be entered by Unit or SKU. You are then able to see the quantities represented as both Unit and SKU.






For example, you can order beer by the Pint (Unit quantity) and see how many Gallons (SKU quantity) would be ordered. You could stocktake your wine by the Case (SKU quantity) and have the system auto calculate how many Glasses (Unit quantity) you have in stock.

### Accessing the Stock Keeping Units Screen

The stock keeping units screen can be accessed via  General Databases then  Stock Keeping Unit

### The Stock Keeping Units Screen (An overview)

Below is a screenshot of the stock keeping units screen.

Stock Keeping Units		
 Add  Edit  Delete  Print		
Drag and Drop Column Header(s) here to Group the data		
Code	Description	SKU Size
=		=
1	Single Units	1
2	Case 24	24
3	1.5 litre (60) 25ml	60
4	Dozen	12
5	Half Dozen	6

## Stock Keeping Units (Continued)

### Adding and Editing Stock Keeping Units

When adding Stock Keeping Units the following fields are available:-

- **Code** (The code is used when linking a product to the SKU. When adding a new SKU, the system will automatically generate the next available free code)
- **Description** (The name for the SKU, this is used on reports)
- **Pack Size** (The quantity of single units which make up one SKU)

#### *To Add a Stock keeping Units*

1. Click 'Add'
2. Enter the details required
3. Click 'Save'

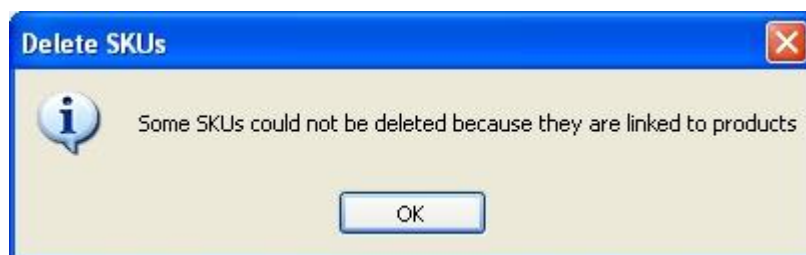
#### *To Edit a Stock Keeping Unit*

1. Select the required SKU by clicking on the row in the grid
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

#### *To Delete a Stock Keeping Unit*

1. Select the required SKU by clicking on the row in the grid
2. Click 'Delete'
3. You will be prompted to confirm deletion (Click 'Yes')

**Note:** You cannot delete SKUs that have products associated with them, attempting to do so will result in a prompt.





## Stock Keeping Units (Continued)

### Printing Stock Keeping Unit Lists

A 'Stock Keeping Units List' can be printed showing the details of your SKUs

#### *To Display Or Print a List of Stock Keeping Units.*

1. Click 'Print' button
2. Select to 'Display' or 'Print' the list

#### **Example1:** A SKU List

19/11/2014

Stock Keeping Unit List

Page 1 of 1

<u>Code</u>	<u>Description</u>	<u>Units per SKU</u>
1	Single units	1.00
2	Case 24	24.00
3	1.5 litre (60) 25ml	60.00
4	Dozen	12.00
5	Half Dozen	6.00
6	Crate Of 24	24.00
7	Bottle	1.00
8	6 Pack	6.00
9	22 Gallon Keg	176.00
10	18 Gallon Keg	144.00
11	11 Gallon Keg	88.00
12	10 Gallon Keg	80.00
13	9 Gallon Keg	72.00
14	10 Litre Coke BIB	220.00
15	3 Litres 125ml	24.00
16	Litre Juice	1.00
17	Litre Cordial	20.00
18	1.5 Litre 25ml	60.00
19	1.5 Litre 50ml	30.00
20	75cl 25ml	30.00

## Product Grouping (Major Groups and Groups)

### Introduction To Product Grouping

'Major groups' and 'Groups' are used to link products into headings for reporting and other purposes. In a hospitality environment for example 'Groups' could be named 'Draught', 'Spirits', 'Bottles' and 'Soft Drinks' which are all linked to a 'Major Group' called 'Wet Sales'. The individual products are then individually linked to a group.

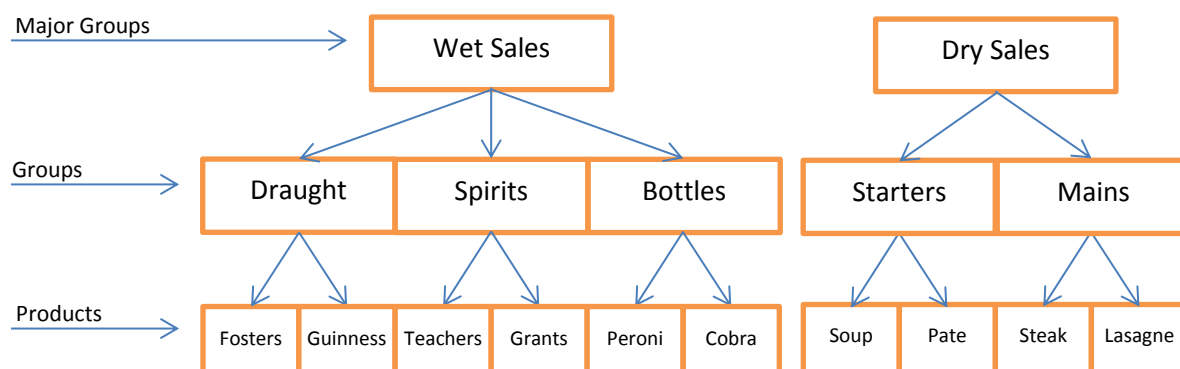
So as an example 'Fosters', 'Carlsberg' and 'Guinness' would be linked to the 'Draught Group' whilst 'Cobra' and 'Peroni' would be linked to the 'Bottles Group'. In a restaurant 'Groups' could be 'Starters', 'Main Courses', and 'Desserts' all under the major group of 'Dry sales'.

In a retail environment, 'Major Groups' could be 'Frozen', 'Fresh Produce', 'Dairy Products' and 'Soft Drinks' with 'Groups' setup as 'Frozen Fish', 'Frozen Vegetables' linked to the 'Frozen' major group.

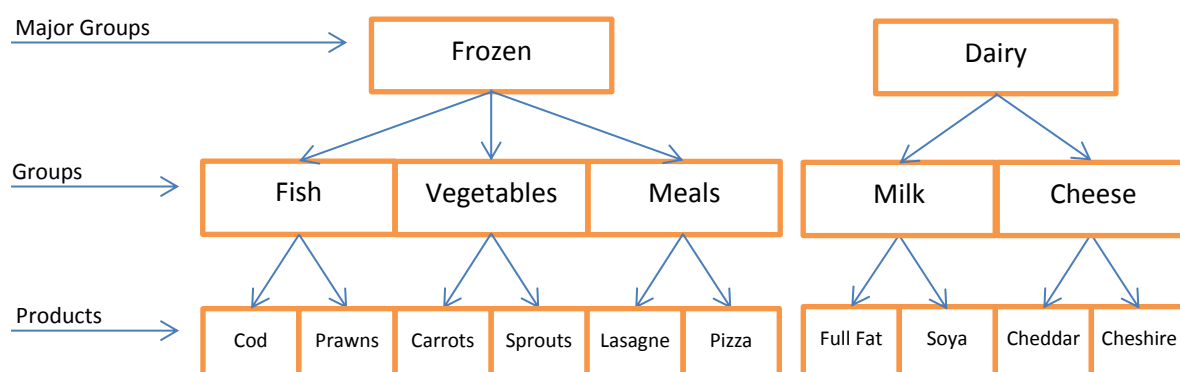
Setting up the 'Group' and 'Major Group' structure needs careful consideration and planning as most of the product reporting is based around this hierarchy.

Examples of both these setups are displayed below:

#### Example1: Showing Typical Hospitality Grouping Structure



#### Example2: Showing Typical Retail Grouping Structure



**Note:** The 'Hospitality' and 'Retail' Grouping Structure examples (shown above) are also used on the following pages.

## Product Grouping (Major Groups and Groups) (Continued)

### Accessing the Product Grouping Screen

The product grouping screen can be accessed via  General Databases then  Product Grouping

### The Product Grouping Screen (An overview)

Below are screenshots of the main grouping screen, utilising the example 'Hospitality' and 'Retail' structures given on the previous page.

**Example1:** Showing the product grouping screen (with the major groups unexpanded) for the 'Typical Hospitality Grouping Structure'.

Code	Description	Allow Cost Entry
=	A	=
1	Wet Sales	<input type="checkbox"/>
2	Dry Sales	<input type="checkbox"/>

**Example2:** Showing the product grouping screen (with the major groups expanded) for the 'Typical Hospitality Grouping Structure'.

Code	Description	Allow Cost Entry
=	<div><div>A</div><div></div></div>	=
1	Wet Sales	<input type="checkbox"/>

Code	Description	Don't Send Products	Start Product Codes From
=	<div><div></div><div></div></div>	=	<div><div>A</div><div></div></div>
1	Draught	<input type="checkbox"/>	100
2	Spirits	<input type="checkbox"/>	200
3	Bottles	<input type="checkbox"/>	300

Code	Description	Allow Cost Entry
2	Dry Sales	<input type="checkbox"/>

Code	Description	Don't Send Products	Start Product Codes From
=	<div><div></div><div></div></div>	=	<div><div>A</div><div></div></div>
4	Starters	<input type="checkbox"/>	400
5	Mains	<input type="checkbox"/>	500

**Please Note:** In this case 'Starting Product Codes' have been set for all the groups. This allows the product codes in each group to be kept together.

## Product Grouping (Major Groups and Groups) (Continued)

**Example3:** Showing the product grouping screen (with the major groups unexpanded) for the 'Typical Retail Grouping Structure'.

Code	Description	Allow Cost Entry
=		=
1	Frozen	<input type="checkbox"/>
2	Dairy	<input type="checkbox"/>

**Example4:** Showing the product grouping screen (with the major groups expanded) for the 'Typical Retail Grouping Structure'.

Code	Description	Allow Cost Entry
=	<div><div></div><div></div></div>	=
1	Frozen	<input type="checkbox"/>

Code	Description	Don't Send Products	Start Product Codes From
=	<div><div></div><div></div></div>	=	<div><div></div><div></div></div>
1	Fish	<input type="checkbox"/>	
2	Vegetables	<input type="checkbox"/>	
3	Meals	<input type="checkbox"/>	

Code	Description	Allow Cost Entry
2	Dairy	<input type="checkbox"/>

Code	Description	Don't Send Products	Start Product Codes From
=	<div><div></div><div></div></div>	=	<div><div></div><div></div></div>
4	Milk	<input checked="" type="checkbox"/>	
5	Cheese	<input checked="" type="checkbox"/>	

**Please Note:** In this example, the milk and cheese items are not sold directly to customers, but are used to make up meals, and so the milk and cheese groups have the setting 'Don't Send Products' set to true (ticked). This means that any products in these groups will not be sent to the PoS.

## Product Grouping (Major Groups and Groups) (Continued)

### Expand View / Shrink View

This screen displays a hierarchical structure of 'Major Groups' and 'Groups'. Rather than expanding individual 'Major Group' rows (via the (+) button displayed to the left of the 'Major Group'). All the rows can be expanded simultaneously in order to quickly view all the records (via use of the 'expand view' button). The 'shrink view' button will hide all the group information, leaving just the major group list visible.

#### *To expand view*

1. Click the 'Expand View' button

#### *To shrink view*

2. Click the 'Shrink View' button

### Adding and Editing Main Groups

When adding/editing 'Major Groups' the following fields are available:

- **Code** (The code is used when linking 'Groups' to 'Major Groups')
- **Description** (The name for the 'Major Group'. Used on reports etc.)
- **Allow Cost Entry** (Set this option to "True" if cost entry is to be allowed against this major group. Usually used for food groups and entered via the 'Major Group Transactions' applet)

#### *To Add a Major Group*

1. Click 'Add'
2. Enter the details required
3. Click 'Save'

#### *To Edit a Major Group (Single Edit)*

1. Select the required major group
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

#### *To Edit a Major Group (Batch Edit)*

1. Select the required major groups
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

#### *To Delete Major Groups*

1. Highlight the major group to be deleted.
2. Click 'Delete'
3. You will be prompted to Confirm deletion (Click 'Yes')

## Product Grouping (Major Groups and Groups) (Continued)

**Note:** You cannot delete 'Major Groups' that have 'Groups' associated with them. Attempting to do so will result in a prompt.



### Adding and Editing Groups

When adding/editing groups the following fields are available:

- **Code** (This is a unique number that identifies the group, and it is auto generated)
- **Description** (This is the name of the group)
- **Don't Send Products** (When set to 'True', products in this group will not be sent to the PoS when a send of data is done. This is used for product such as ingredients, which are not sold on the PoS.)
- **Next Free Product Code** (Used to automatically separate the product codes used for products in set groups. See section on 'Product Maintenance' on page 51 for more information.)
- **Major Group** (The 'Major Group' to which the 'Group' belongs)
- **Discountable Flags 001 – 032** (Used for linking between discounts and groups)
- **Minimum Age** (When enabled the PoS can be set to enforce this age limit, resulting in a prompt to the Clerk when selling any items from this group. Requesting they verify the age of the customer.)

#### *To Add a Group*

1. Click 'Add'
2. Enter the details required
3. Click 'Save'

#### *To Edit a Group (Single Edit)*

1. Select the required group
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

#### *To Edit a Group (Batch Edit)*

1. Select the required groups
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

## Grouping (Major Groups and Groups) (Continued)

### *To Delete A Group*

1. Highlight the group to be deleted.
2. Click 'Delete'
3. You will be prompted to confirm deletion (Click 'Yes')

**Note:** You cannot delete 'Groups' that have products associated with them. Attempting to do so will result in a prompt.



### **Next Free Code**

When saving a group with the 'Next Free Code' field set. The system will check for any other group which has a 'Next Free Code' set and prompts you of the other groups and their starting codes.

**Note:** See Section on 'Product Maintenance' on page 51 for more information, on how these starting codes are applied to products.

## Product Grouping (Major Groups and Groups) (Continued)

**Example1:** Showing the prompt displayed when saving with the 'Next Free Code Set', if other groups with 'Starting codes' exist.

Misc	
Code	3
Description	<b>Bottles</b>
Don't Send Products	False
Next Free Product Code	<b>300</b>
Major Group	Wet Sales

Product Code

The preceding starting product code is group:-  
2) Spirits with 200

Do you still want to save?

Yes No



## Product Grouping (Major Groups and Groups) (Continued)

### Analyse / Quick Compare

In addition to sales reports ran from the 'Reporting' applet, the product grouping screen has the ability to generate graphs of product sales, to allow for a quick comparison. This feature is accessible via the 'Analyse' button.

To use this feature, select the 'Groups' to be added to the 'Analyse/Quick Compare' and then set a 'Date Range'.

You are then able to view graphs based upon sales information for this date range, with the additional function of being able to specify a 'Compare Date Range', and then view sales data for both these ranges on the same graph for comparison. Various options can be adjusted to best suit your needs, and 33 different types of graph are available.

**Note:** A similar function also exists on the 'Product Maintenance' screen

### Adding Groups to Analyse/Quick Compare

'Groups' can be added either individually, or by selecting a major group, you can select all the groups within that major group.

#### To add Groups to Analyse/Quick Compare

1. Select the 'Groups' required (Via 'Major Group' or 'Group')
2. Right-click on the screen to display the context menu
3. Select 'Add to Quick Compare'

The screenshot shows a software interface with two tables. The top table has columns: Code, Description, and Allow Cost Entry. It contains one row with Code '1' and Description 'Wet Sales'. The bottom table has columns: Code, Description, Don't Send Products, and Start Product Codes From. It contains three rows: Code '1' Description 'Draught', Code '2' Description 'Spirits', and Code '3' Description 'Bottles'. A context menu is open over the 'Draught' row, showing the option 'Add to Quick Compare'.

Code	Description	Allow Cost Entry
1	Wet Sales	<input type="checkbox"/>

Code	Description	Don't Send Products	Start Product Codes From
1	Draught	<input type="checkbox"/>	100
2	Spirits	<input type="checkbox"/>	200
3	Bottles	<input type="checkbox"/>	300

Code	Description	Allow Cost Entry
2	Dry Sales	<input type="checkbox"/>

**Note:** 'Major Groups' can also be selected, resulting in all 'Groups' which belong to that 'Major Group' being added.

The screenshot shows the same software interface as the previous one. In this instance, the 'Wet Sales' row in the top table is highlighted, and a context menu is open over it, showing the option 'Add to Quick Compare'.

Code	Description	Allow Cost Entry
1	Wet Sales	<input type="checkbox"/>

Code	Description	Don't Send Products	Start Product Codes From
1	Draught	<input type="checkbox"/>	100
2	Spirits	<input type="checkbox"/>	200
3	Bottles	<input type="checkbox"/>	300

Code	Description	Allow Cost Entry
2	Dry Sales	<input type="checkbox"/>

## Product Grouping (Major Groups and Groups) (Continued)

### Removing Groups from Analyse/Quick Compare

Groups can be removed from the 'Analyse/Quick Compare' list individually, or the entire list cleared at once.

#### To Remove Groups from Analyse/Quick Compare

1. If the 'Analyse/Quick Compare' bar is not in view click the 'Analyse' button to bring it into view
2. Right-click the 'Group' you wish to remove
3. Select 'Remove Group' or 'Clear all Groups'

### Setting a 'Date Range' and or 'Compare Date Range'

In order for the analysis function to be used, a 'Date Range' and 'Compare Date Range' (if comparing) is required.

#### To Set a 'Date Range' and or 'Compare Date Range'

1. If the 'Analyse/Quick Compare' bar is not in view click the 'Analyse' button to bring it into view
2. Use the date selectors on the 'Date' Tab to select a start and end date for the analyse
3. When a 'Comparison Date Range' is required, access the 'Compare' tab, tick the box marked "Compare Date Range", and then enter the start and end date for the comparison.

## Product Grouping (Major Groups and Groups) (Continued)

To set a date, click the button at the end of the box, this produces a calendar view, you can click a date to select it, or click the month, to change the selection to move to a different month. The times can be adjusted by clicking in the appropriate section (hours / minutes / seconds), then use the arrow (cursor) keys to change the value up or down.

### *To View Grouping Analyse/Quick Compare Graphs*

1. If the 'Analyse/Quick Compare' bar is not in view click the 'Analyse' button to bring it into view
2. With Group(s) added and date range or ranges set, click the 'Create Graph' Button

### *To Change The Graph Type*


1. When viewing an analyse graph, click the 'Options' button.
2. From the popup screen, click the "Appearance" tab
3. Select the graph type from the drop down list in the "Graph Type" section.
4. Click 'OK'

**Note:** You can use the same 'Options' screen to alter the graphs values, e.g. change the graph to daily, weekly, monthly, or yearly. Change the value from 'Sales Total', to 'Sales Quantity'. You can also use this screen to filter the graph to a given site, and limit the product group selection if required.

**Note:** Options here can be used to perform several functions including:

- Changing the date ranges used.
- Changing the Sites, Locations, and POS upon which the sale information is based.
- Changing if and where on the screen the legend will display
- Changing the graph type

### *To print a Graph*

1. With the graph in view, Click the printer icon () displayed in the top right of the screen. The system will then attempt to print the graph using your default printer.

### **Printing Grouping Lists**

Grouping Lists can be printed showing the details of your grouping structure and groups. Below are examples of these lists based upon the 'Hospitality' and 'Retail' grouping structures given at the beginning of the grouping section.

### *To Print a Grouping List*

1. Click 'Print' button
2. Select to 'Display' or 'Print' the list

Available Grouping Lists are:-

- **Major Group/Group Structure**
- **Major Group Only List**
- **Group Only List**
- **Group List Inc. POS Specifics**

## Product Grouping (Major Groups and Groups) (Continued)

**Example1:** A 'Major Group/Group Structure' based on the 'Typical Hospitality Grouping Structure' example given at the start of this section.

16/03/2015	<b>Major Group And Group List</b>			Page 1 of 1
<u>Major Group Name</u>		<u>Allow Cost</u>		
1) Wet Sales		No		
	<u>Group Name</u>		<u>Don't Send To POS</u>	
	1 Draught		False	
	2 Spirits		False	
	3 Bottles		False	
2) Dry Sales		No		
	<u>Group Name</u>		<u>Don't Send To POS</u>	
	4 Starters		False	
	5 Mains		False	

**Example2:** A 'Major Group Only List' based on the 'Typical Hospitality Grouping Structure' example given at the start of this section.

16/03/2015	<b>Major Group List</b>			Page 1 of 1
<u>Code</u>	<u>Major Group Name</u>		<u>Allow Cost</u>	
1	Wet Sales		No	
2	Dry Sales		No	

**Example3:** A 'Group Only List' List based on the 'Typical Hospitality Grouping Structure' example given at the start of this section.

16/03/2015	<b>Group List</b>			Page 1 of 1
<u>Code</u>	<u>Group Name</u>		<u>Don't Send To POS</u>	
1	Draught		False	
2	Spirits		False	
3	Bottles		False	
4	Starters		False	
5	Mains		False	

**Example4:** A 'Group List Inc. POS Specifics' List based on the 'Typical Hospitality Grouping Structure' example given at the start of this section.

16/03/2015	<b>Group List Inc POS Specifics</b>				Page 1 of 1
<u>Code</u>	<u>Group Name</u>	<u>Don't Send To POS</u>	<u>Min Age</u>	<u>Discount</u>	
1	Draught	False	0	0	
2	Spirits	False	0	0	
3	Bottles	False	0	0	
4	Starters	False	0	0	
5	Mains	False	0	0	

## Product Grouping (Major Groups and Groups) (Continued)

### Product Grouping Reports

There are a variety of reports which make use of the information entered against groups.

Including for example:

- **Product Report Including Major Cost Entry**
- **Product Group Report**
- **Product Major Group Report**
- **Product Group Weekly Report**
- **Product Group Daily Report**
- **Product Group Hourly Report**
- **Product Major Group Weekly Report**
- **Product Major Group Daily Report**
- **Product Major Group Hourly Report**
- **Product Major Group/PoS Report By Day**
- **Product Group Report (Split By Site)**
- **Product Major Group Report (Split By Site)**

General options that affect: Grouping			
Category	Subsection	Title	Description
General Options	Defaults	Major Group Codes Start From Zero	Should the major groups start from code 1 or code 0. For GPoS terminals, this should always be set to 'False'
General Options	Defaults	Highlight Deletable Groups	If a group can be deleted (because it has no products linked to it) highlight it in red. If a major group can be deleted (because it has no groups linked to it) highlight it in red.

## Product Maintenance

### Introduction To Product Maintenance

Products represent the items you sell, whether you sell a product by pressing a button on the PoS screen, by entering a code, or by scanning with a barcode. All Products have a unique code number which is used to register sales against it.

The product maintenance screen is where you manage the products you stock and sell. In a basic sense, its where you add, edit, and delete your products, but also provides a lot of additional functionality.

Product can be added/edited here individually, or in batch, and can be added completely fresh or based upon either another product, or a product template, in order to speed up product creation and management.

The view of your products given by this screen is also highly customisable. Whilst this screen can show all your products in a list, it also provides functionality for multiple 'filters'. Filters can be combined with 'grouping' and 'sorting' to facilitate searching for a product, and display that information to you in a more manageable way.

Beyond product maintenance, this screen also provides additional quick access to other features without the need to leave this screen. You can add products to the label print queue, or see basic information of mixtures to which a product links, or quickly check what stock of a product you have available across all your sites.

This screen also provides a flexible reporting method, where you can select from a list of predefined product reports, or use other feature such as 'grid print' to tailor exactly what information you want to see on screen for exactly which product, and then print or export that information in a variety of different formats including Microsoft Excel.

### Accessing the Product Maintenance Screen

The product maintenance screen can be accessed via  General Databases then  Products

**Note:** On first entry to the product maintenance screen you are prompted with the option to import default filters, selecting 'Yes' will add these to your filter list.

## Product Maintenance (Continued)

### The Product Maintenance Screen (An overview)

Below is a screenshot of the main product maintenance screen.

Product Maintenance - Site #1 Site A (5/8) Default						
Add New            Edit            Delete            Print            Show Filters            Show Customise View           Default Prices           Prices           Stock Levels           Price Level           Price Modifier           Show Deletions           Show Reserved           Analyse           Save Open Windows						
Drag and Drop Column Header(s) here to Group the data						
Code	Product Name	Cost	%	Tax	Major Group	Group
*		=	=			
1	Product A	£0.50	50.00	No Tax Defined	Wet Sales	Draught
2	Product B	£0.50	50.00	No Tax Defined	Wet Sales	Draught
3	Product C	£0.50	50.00	No Tax Defined	Wet Sales	Draught
4	Product D	£0.25	80.00	STD VAT	Wet Sales	Draught
5	Product E	£0.65	48.00	STD VAT	Wet Sales	Draught

### Screen Loading

On entry to the screen the system will load in all your products, which may take a few seconds dependent on the amount of products in the system.

Whilst this loading is taking place, the title bar of the screen will display the text “Loading...” until completion, at which point the text will be replaced with the number of products being displayed.

Product Maintenance - Site #1 Site A (Loading...)

Product Maintenance - Site #1 Site A (22209)

During the loading process the text “X Rows Loaded” will be displayed at the bottom of the screen. Where ‘X’ is the amount of rows loaded so far. This number will increment until all the rows have been loaded.

18000 Rows Loaded Cancel Load

## Product Maintenance (Continued)

**Note:** Attempting to close the screen whilst loading or refreshing will result in a prompt.



If you wish to close the screen at this time you can cancel the loading process using the 'Cancel Load' button, (displayed at the bottom of the screen).

### Refreshing the Screen

Total Control Premier is a multi-user system, and whilst the data you see on the product screen is current at the time of loading. Adding and editing of products by other users of the system can mean that the data has changed since you loaded the screen.

Total Control Premier detects changes to the data when they occur, but rather than initiating a full refresh whenever a change is detected. The system informs you that changes have been detected, (via a Text displayed at the bottom of the screen).

6 change(s) detected, F5 to refresh

You will then have the option to refresh the screen and therefore insure you are working on the data in its most current form.

### To Refresh the Screen

- **F5** – Refreshes the product details shown on the screen, not including stock fields
- **Shift + F5** – Refreshes the product details shown on the screen, including the stock fields.

**Note:** Whilst the screen is refreshing the text “Refreshing Products” will be displayed at the bottom of the screen.

Refreshing Products

### Price Level and Price Modifier Filters

The product maintenance screen has dropdown selections for 'Price Level' and 'Price Modifier'

By default on entry to this screen they are set to 'Price Level 1', 'Normal' which represents the default selling price.

These filters can be set by making any selection from the dropdown lists.

When changed, these filters will cause the screen to only display products which have a price set against the selected 'Price Levels' and 'Modifiers'. You can select as many price levels and modifiers as required.



## Product Maintenance (Continued)

**Example1:** Showing the 'Price level'/'Price Modifier' filters set at their default values of 'Price Level 1', 'Normal'

	Code	Product Name	Price Level 1 Normal
*		<input type="checkbox"/>	=
	1	Product A	£1.00
	2	Product B	£1.00
	3	Product C	£1.00
	4	Product D	£1.50

**Example2:** Showing the 'Price levels' 1 and 2 selected.

Price Level	Price Modifier	Show Deletions	Show Reserved	Analyse	Save Open Windows
Price Level 1					
Price Level 2					
Price Level 3					
Price Level 4					
Price Level 5					
Price Level 6					
Price Level 7					

	Code	Product Name	Price Level 1 Normal	Price Level 2 Normal
*		<input type="checkbox"/>	=	=
	1	Product A	£1.00	£0.55
	2	Product B	£1.00	£0.55
	3	Product C	£1.00	£0.55
	4	Product D	£1.50	£0.80

**Example3:** Showing 'Price level 1' and 'Price Modifiers' normal and half selected.

Drag and Drop Column Header(s) here to Group the data				
	Code	Product Name	Price Level 1 Normal	Price Level 1 HALF
*		<input type="checkbox"/>	=	=
	1	Product A	£1.00	£0.50
	2	Product B	£1.00	£0.50
	3	Product C	£1.00	£0.50
	4	Product D	£1.50	£0.75

## Product Maintenance (Continued)

### Product Statuses and Status Filters ('Show Deletions' / 'Show Reserved')

Every product in the database has a 'status' field, which will be set to one of the following:

- **Normal** -Product is in normal state
- **Pending Deletion** –Product has been deleted, but the deletions have not yet been sent to all PoS.
- **Deleted** –Product has been deleted, and the deletion has been sent to all PoS.
- **Reserved** –The product is in use by another user

To make the difference between these statuses clear, products of statuses other than 'Normal' are highlighted, as shown below:

Status	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier
Normal	7	ProductG	£0.00000	£0.00	MG1	G1a	-10	0	<input checked="" type="checkbox"/>	0

Pending Deletion	7	ProductG	£0.00000	£0.00	MG1	G1a	-10	0	<input checked="" type="checkbox"/>	0
------------------	---	----------	----------	-------	-----	-----	-----	---	-------------------------------------	---

Deleted	7	ProductG	£0.00000	£0.00	MG1	G1a	-10	0	<input checked="" type="checkbox"/>	0
---------	---	----------	----------	-------	-----	-----	-----	---	-------------------------------------	---

Reserved (Currently being added)	7	ProductG	£0.00000	£0.00	MG1	G1a	-10	0	<input checked="" type="checkbox"/>	
----------------------------------	---	----------	----------	-------	-----	-----	-----	---	-------------------------------------	--

The product maintenance screen defaults (on entry) to only displaying products of status 'Normal', with products of other status being hidden from view. These other products can be brought into view using the 'Show Deletions' and 'Show Reserved' buttons, as is shown in the examples below.

**Note:** The number displayed at the top of the screen shows how many products are in view, and how many exist in total. So in the example below only 5 of 8 products are in view currently.

**Example1:** Showing the product screen in its default condition (Only showing products of status 'Normal'. Note that only 5 of 8 products are in view.

Product Maintenance - Site #1 Site A (5/8) Default										
Add New Edit Delete Print Show Filters Show Customise View Default Prices Prices Stock Levels Price Level Price Modifier Show Deletions Show Reserved Analyse Save Open Windows										
Drag and Drop Column Header(s) here to Group the data										
Code	Product Name	Cost	%	Tax	Major Group	Group				
*		=	=	A	A	A				
1	Product A	£0.50	50.00	No Tax Defined	Wet Sales	Draught				
2	Product B	£0.50	50.00	No Tax Defined	Wet Sales	Draught				
3	Product C	£0.50	50.00	No Tax Defined	Wet Sales	Draught				
4	Product D	£0.25	80.00	STD VAT	Wet Sales	Draught				
5	Product E	£0.65	48.00	STD VAT	Wet Sales	Draught				

## Product Maintenance (Continued)

**Example2:** Showing the product screen with 'Show Deletions' enabled (Only showing products of status 'Normal', 'Pending Deletion' and 'Deleted'. Note that only 7 of 8 products are in view.

Product Maintenance - Site #1 Site A (7/8) Default						
Add New ▾ Edit ▾ Delete ▾ Print ▾ Show Filters ▾ Show Customise View ▾ Default Prices ▾ Prices ▾ Stock Levels ▾ Price Level ▾ Price Modifier ▾ Show Deletions ▾ Show Reserved ▾ Analyse ▾ Save Open Windows						
Drag and Drop Column Header(s) here to Group the data						
Code	Product Name	Cost	%	Tax	Major Group	Group
* [ ]	=	=	[A]	[A]	[A]	[A]
1	Product A	£0.50	50.00	No Tax Defined	Wet Sales	Draught
2	Product B	£0.50	50.00	No Tax Defined	Wet Sales	Draught
3	Product C	£0.50	50.00	No Tax Defined	Wet Sales	Draught
4	Product D	£0.25	80.00	STD VAT	Wet Sales	Draught
5	Product E	£0.65	48.00	STD VAT	Wet Sales	Draught
6	Product F	£0.65	48.00	STD VAT	Wet Sales	Draught
7	Product G	£0.65	48.00	STD VAT	Wet Sales	Draught

**Example3:** Showing the product screen with 'Show Reserved' enabled (Only showing products of status 'Normal' and 'Reserved'. Note that only 6 of 8 products are in view.

Product Maintenance - Site #1 Site A (6/8) Default						
Add New ▾ Edit ▾ Delete ▾ Print ▾ Show Filters ▾ Show Customise View ▾ Default Prices ▾ Prices ▾ Stock Levels ▾ Price Level ▾ Price Modifier ▾ Show Deletions ▾ Show Reserved ▾ Analyse ▾ Save Open Windows						
Drag and Drop Column Header(s) here to Group the data						
Code	Product Name	Cost	%	Tax	Major Group	Group
* [ ]	=	=	[A]	[A]	[A]	[A]
1	Product A	£0.50	50.00	No Tax Defined	Wet Sales	Draught
2	Product B	£0.50	50.00	No Tax Defined	Wet Sales	Draught
3	Product C	£0.50	50.00	No Tax Defined	Wet Sales	Draught
4	Product D	£0.25	80.00	STD VAT	Wet Sales	Draught
5	Product E	£0.65	48.00	STD VAT	Wet Sales	Draught
8	***RESERVED***	£0.00	0.00	No Tax Defined		0

## Product Maintenance (Continued)

**Example4:** Showing the product screen with both 'Show Deletions' and 'Show Reserved' enabled (Showing all products, including statuses of 'Normal' 'Pending Deletion' 'Deleted' and 'Reserved'). Note that all 8 products are in view.

Product Maintenance - Site #1 Site A (8) Default						
Add New Edit Delete Print Show Filters Show Customise View Default Prices Prices Stock Levels Price Level Price Modifier Show Deletions Show Reserved Analyse Save Open Windows						
Drag and Drop Column Header(s) here to Group the data						
Code	Product Name	Cost	%	Tax	Major Group	Group
*		=	=	A	A	A
1	Product A	£0.50	50.00	No Tax Defined	Wet Sales	Draught
2	Product B	£0.50	50.00	No Tax Defined	Wet Sales	Draught
3	Product C	£0.50	50.00	No Tax Defined	Wet Sales	Draught
4	Product D	£0.25	80.00	STD VAT	Wet Sales	Draught
5	Product E	£0.65	48.00	STD VAT	Wet Sales	Draught
6	Product F	£0.65	48.00	STD VAT	Wet Sales	Draught
7	Product G	£0.65	48.00	STD VAT	Wet Sales	Draught
8	***RESERVED***	£0.00	0.00	No Tax Defined		0

## Product Maintenance (Continued)

### Filters

By default the Product Maintenance screen lists all the products in your database for the site selected.

The filters feature can be used to filter this information, so only products matching set criteria are shown.

A set of default filters are provided as standard, but it's also possible to create your own.

The filter files can then be exported and passed to other users to be imported into their system

The list of default filters are:-

- All (reset, no filter)
- All Deleted or Pending Deletion
- All Mixture Products
- All Stock Below Zero
- All Stock Zero
- All Stockable Products
- All Updated Products
- All Zero Cost Products
- All Zero Price Products

**Note:** When a filter is applied, the filters name will be displayed at the top of the screen, along with numerical values in the format (X/Y), where 'Y' is the total number of products and 'X' is the number of products currently in view.

**Product Maintenance - Site #1 Site A (11971/22209) All Stockable Products**

### Automatic Import of Default Filters

On first entry to the product maintenance screen you are prompted with the option to import default filters, selecting 'Yes' will add these to your filter list.



**Note:** The prompt above is only shown on first entry to the product maintenance screen. If you have selected 'NO' but then decide you wish to import these default filters. Deleting all your filters will cause the prompt to be displayed again. Alternatively you can import them manually.

## Product Maintenance (Continued)

### Manual Import Of Product Filters

1. Click 'Show Filters' button to display the 'Product Filter Bar'
2. Click the 'Filter' button
3. Click 'Import Filter' button
4. Navigate to the location of the filter file you wish to use.

For example: 'All Stockable Products.FLT'

**Note:** On a default install, Total Control Premier's default filters are located here:-

"C:\Program Files\Fidelity Systems\Total Control Premier\Resources\ProductFilters"

Or

"C:\Program Files (x86)\Fidelity Systems\Total Control Premier\Resources\ProductFilters" for 64 bit operating systems.

### Exporting a Filter

Filters you have created can be exported, and then imported into another Total Control Premier database.

#### *To export a filter*

1. Click 'Show Filters' button to display the 'Product Filter Bar'
2. Select the filter to export
3. Click the 'Filter' button
4. Click 'Export Filter' button
5. Navigate to the location where you wish to save the filter file.

**Note:** Filter files use the file format (.FLT) for example: MyFilter.FLT



## Product Maintenance (Continued)

### Deleting a Filter

Filters can be deleted if required.

#### *To delete a filter*

1. Click the 'Show Filters' button to display the 'Product Filter Bar'
2. Select the filter you wish to delete
3. Click 'Delete Filter' (Accessed via the dropdown arrow displayed to the right of the 'Filter' button)
4. You will be prompted to confirm deletion
5. Click 'Yes'



### Set Filter As default

By default (On entry) the product maintenance screen is unfiltered, however a filter can be set as 'default' meaning it will be applied automatically every time you enter the product maintenance screen. **Note:** Default Filters are coloured Red on the 'Product Filter Bar'



#### *To set a filter as default*

1. Click 'Show Filters' button to display the 'Product Filter Bar'
2. Select the filter to set as default
3. Click the 'Filter' button
4. Click 'Set Filter as Default' button

## Product Maintenance (Continued)

### Saving a Filter

Any changes you have made to a filter can be saved against that filter. So that next time it is applied the change you have made to the filter will also be applied.

When saving a filter the following information is retained:

- **Filter Name**
- **Sorting (Price Ascending etc.)**
- **Grouping (For example: Grouped by Major Group and then Supplier etc.)**
- **Filtering (For example: Filtered to only show Selling prices less than £20 etc.)**
- **Customised View (Only showing selected fields etc.)**

### To Save a Filter

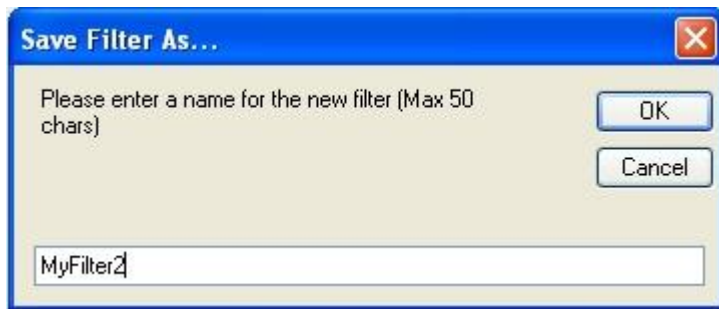
1. With a filter applied, make any changes required
2. Click 'Show Filters' button to display the 'Product Filter Bar'
3. Click the 'Filter' button
4. Click 'Save Filter' button

**Note:** A Filter can be renamed via the box displayed at the top of the product filter bar.

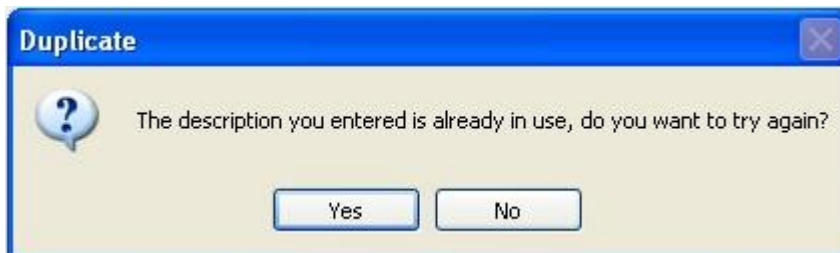
### To Save as a new Filter (Using save as)

If you wish to save any changes made to a filter, but also wish to retain the original filter, then you can use the "Save As" function to create a new filter, which leaves the original filter un-altered.

1. With a filter applied, make any changes required
2. Click 'Show Filters' button to display the 'Product Filter Bar'
3. Click the 'Filter' button
4. Click 'Save As New Filter' button
5. You will be prompted to enter a name for the new filter.



**Note:** If the Filter Description you enter is already in use, you will be prompted accordingly.





## Product Maintenance (Continued)

### Saving Filter on Exit/Refresh

On attempting to 'Exit' or 'Refresh' the product screen, the system will check if any changes have been made to the filter currently applied, and will prompt accordingly with the option to save these



### Removing any Filters applied.

Any filters you have applied can be cleared in a single operation allowing you to view the full unfiltered list of products.

#### *To remove any filters applied.*

1. Click 'Show Filters' button to display the 'Product Filter Bar'
  2. Click 'All (reset, no filter)'
- Or
1. Right-click the product maintenance screen to display the context menu
  2. Select 'Reset Filtering on Grid'

## Product Maintenance (Continued)

### Field/Column Filters.

**Example1:** Showing the grid with no 'Field Filters' applied

	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
*		<input type="text"/>	=	=	<input type="text"/>	<input type="text"/>	=	=	=	<input type="text"/>	<input type="text"/>
	1	ProductA	£0.50000	£1.00	MG1	G1a	926	51	<input checked="" type="checkbox"/>	SupplierA	LV426-A
	2	ProductB	£1.70000	£2.50	MG1	G1b	903	101	<input checked="" type="checkbox"/>	SupplierA	LV426-B
	3	ProductC	£1.00000	£2.50	MG2	G2a	405	11	<input checked="" type="checkbox"/>	SupplierB	LV426-C
	4	ProductD	£0.01000	£0.01	MG2	G2b	2	0	<input checked="" type="checkbox"/>	SupplierB	
	5	ProductE	£0.80000	£1.20	MG1	G1a	514	0	<input checked="" type="checkbox"/>	SupplierC	

**Example2:** Showing the grid with 'Field Filters' applied. ('Cost less than or Equal to £1' and 'Price greater than £1')

	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
*		<input type="text"/>	≤	£1.00000	>	£1.00	<input type="text"/>	=	=	=	<input type="text"/>
	3	ProductC	£1.00000	£2.50	MG2	G2a	405	11	<input checked="" type="checkbox"/>	SupplierB	LV426-C
	5	ProductE	£0.80000	£1.20	MG1	G1a	514	0	<input checked="" type="checkbox"/>	SupplierC	

Note that 'product code 3' is showing due to the 'Less than or equal to' filter being used instead of just 'Less than'. If the standard 'Less Than' filter had been used this product would not have been included due to not matching the search criteria (As shown below).

**Example3:** Showing the grid with 'Field Filters' applied. ('Cost less than £1' and 'Price greater than £1')

	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
*		<input type="text"/>	<	£1.00000	>	£1.00	<input type="text"/>	=	=	=	<input type="text"/>
	5	ProductE	£0.80000	£1.20	MG1	G1a	514	0	<input checked="" type="checkbox"/>	SupplierC	

## Product Maintenance (Continued)

### Sorting By Fields

By default the product maintenance screen lists all the products in your database, ordered by 'Product Code (Ascending)'. This lists the products starting with the lowest code, for example, 1,2, 10, 100 etc.

You can sort the data by any of the fields available, in either Ascending (0-99, A – Z etc.) or Descending Order (99-0, Z – A etc.) as is shown in the examples below:

**Note:** Any sorting applied can be saved against the filter.

**Example1:** Showing the product maintenance screen with its default sorting of 'Code (Ascending)' (1-5)

	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
*		<input type="text"/>	=	=	<input type="text"/>	<input type="text"/>	=	=	=	<input type="text"/>	<input type="text"/>
	1	ProductA	£0.50000	£1.00	MG1	G1a	926	51	<input checked="" type="checkbox"/>	SupplierA	LV426-A
	2	ProductB	£1.70000	£2.50	MG1	G1b	903	101	<input checked="" type="checkbox"/>	SupplierA	LV426-B
	3	ProductC	£1.00000	£2.50	MG2	G2a	405	11	<input checked="" type="checkbox"/>	SupplierB	LV426-C
	4	ProductD	£0.01000	£0.01	MG2	G2b	2	0	<input checked="" type="checkbox"/>	SupplierB	
	5	ProductE	£0.80000	£1.20	MG1	G1a	514	0	<input checked="" type="checkbox"/>	SupplierC	

**Example2:** Showing the product maintenance screen sorted by 'Cost (Ascending)' (Lowest Cost Price first)

	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
*		<input type="text"/>	=	=	<input type="text"/>	<input type="text"/>	=	=	=	<input type="text"/>	<input type="text"/>
	4	ProductD	£0.01000	£0.01	MG2	G2b	2	0	<input checked="" type="checkbox"/>	SupplierB	
	1	ProductA	£0.50000	£1.00	MG1	G1a	926	51	<input checked="" type="checkbox"/>	SupplierA	LV426-A
	5	ProductE	£0.80000	£1.20	MG1	G1a	514	0	<input checked="" type="checkbox"/>	SupplierC	
	3	ProductC	£1.00000	£2.50	MG2	G2a	405	11	<input checked="" type="checkbox"/>	SupplierB	LV426-C
	2	ProductB	£1.70000	£2.50	MG1	G1b	903	101	<input checked="" type="checkbox"/>	SupplierA	LV426-B

**Example3:** Showing the product maintenance screen sorted by 'Price (Descending)' (Most Expensive First)

	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
*		<input type="text"/>	=	=	<input type="text"/>	<input type="text"/>	=	=	=	<input type="text"/>	<input type="text"/>
	2	ProductB	£1.70000	£2.50	MG1	G1b	903	101	<input checked="" type="checkbox"/>	SupplierA	LV426-B
	3	ProductC	£1.00000	£2.50	MG2	G2a	405	11	<input checked="" type="checkbox"/>	SupplierB	LV426-C
	5	ProductE	£0.80000	£1.20	MG1	G1a	514	0	<input checked="" type="checkbox"/>	SupplierC	
	1	ProductA	£0.50000	£1.00	MG1	G1a	926	51	<input checked="" type="checkbox"/>	SupplierA	LV426-A
	4	ProductD	£0.01000	£0.01	MG2	G2b	2	0	<input checked="" type="checkbox"/>	SupplierB	

**Example4:** Showing the product maintenance screen sorted by 'Current Stock (Ascending)' (Least Amount of stock First)

	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
*		<input type="text"/>	=	=	<input type="text"/>	<input type="text"/>	=	=	=	<input type="text"/>	<input type="text"/>
	4	ProductD	£0.01000	£0.01	MG2	G2b	2	0	<input checked="" type="checkbox"/>	SupplierB	
	3	ProductC	£1.00000	£2.50	MG2	G2a	405	11	<input checked="" type="checkbox"/>	SupplierB	LV426-C
	5	ProductE	£0.80000	£1.20	MG1	G1a	514	0	<input checked="" type="checkbox"/>	SupplierC	
	2	ProductB	£1.70000	£2.50	MG1	G1b	903	101	<input checked="" type="checkbox"/>	SupplierA	LV426-B
	1	ProductA	£0.50000	£1.00	MG1	G1a	926	51	<input checked="" type="checkbox"/>	SupplierA	LV426-A

## Product Maintenance (Continued)

### To Sort by a Field

1. Click on the Column header for the field you wish to sort by (The area with the field name at top of column)
2. If you wish to sort column in the opposite direction (Ascending/Descending order), simply click the header again.

### Selecting Products on screen

Many actions on the product maintenance screen require a product to be highlighted first.

Examples of this would be 'editing', 'adding using current', 'checking stock levels' etc.

The following explains how to select both single and multiple products on this screen

### To select the products

On entry to this screen no lines will be selected

	Code	Product Name	Cost	Current Stock	Price	%	Major Group	Tax
*		<input type="text"/>	=	=	=	=	<input type="text"/>	<input type="text"/>
	1	ProductA	£0.50000	926	£1.00	50.00	MG1	No Tax Defined
	2	ProductB	£1.70000	903	£2.00	-2.00	MG1	Standard Tax
	3	ProductC	£1.00000	405	£2.50	52.00	MG1	Standard Tax
	4	ProductD	£0.01000	2	£0.01	0.00	MG1	No Tax Defined
	5	ProductE	£0.80000	514	£1.20	33.33	MG1	No Tax Defined

You can select a single line by moving the cursor to that product and left-clicking with the mouse.

	Code	Product Name	Cost	Current Stock	Price	%	Major Group	Tax
*		<input type="text"/>	=	=	=	=	<input type="text"/>	<input type="text"/>
	1	ProductA	£0.50000	926	£1.00	50.00	MG1	No Tax Defined
	2	ProductB	£1.70000	903	£2.00	-2.00	MG1	Standard Tax
	3	ProductC	£1.00000	405	£2.50	52.00	MG1	Standard Tax
	4	ProductD	£0.01000	2	£0.01	0.00	MG1	No Tax Defined
	5	ProductE	£0.80000	514	£1.20	33.33	MG1	No Tax Defined

You can select multiple products (When they appear one after the other in the list) by clicking down on the product with the left-mouse-button and holding this button down whilst dragging the cursor up or down on the list of products.

	Code	Product Name	Cost	Current Stock	Price	%	Major Group	Tax
*		<input type="text"/>	=	=	=	=	<input type="text"/>	<input type="text"/>
	1	ProductA	£0.50000	926	£1.00	50.00	MG1	No Tax Defined
	2	ProductB	£1.70000	903	£2.00	-2.00	MG1	Standard Tax
	3	ProductC	£1.00000	405	£2.50	52.00	MG1	Standard Tax
	4	ProductD	£0.01000	2	£0.01	0.00	MG1	No Tax Defined
	5	ProductE	£0.80000	514	£1.20	33.33	MG1	No Tax Defined

## Product Maintenance (Continued)

Clicking another product or multiple products at this point would deselect those you have already selected. In order to select additional products without de-selecting those already selected, hold down the 'Ctrl' Key on the Keyboard whilst making the selection.

	Code	Product Name	Cost	Current Stock	Price	%	Major Group	Tax
*			=	=	=	=	A	A
1		ProductA	£0.50000	926	£1.00	50.00	MG1	No Tax Defined
2		ProductB	£1.70000	903	£2.00	-2.00	MG1	Standard Tax
3		ProductC	£1.00000	405	£2.50	52.00	MG1	Standard Tax
4		ProductD	£0.01000	2	£0.01	0.00	MG1	No Tax Defined
5		ProductE	£0.80000	514	£1.20	33.33	MG1	No Tax Defined

To make the selection process more manageable, two additional options 'Select All In Filter' and 'Invert Selection' are available. These options are accessed via the Right click Context menu.

### Select All in Filter

This feature will select all products in the current filter

#### *To select all the products currently on screen*

1. 'Right Click' anywhere on the product grid, to display the context menu.
  2. Click 'Select All in Filter'
- Or
1. Hold down the 'Ctrl' Button on the keyboard and press 'A'

**Example1:** Showing the product grid before using the 'Select All in Filter' function.

	Code	Product Name	Cost	Current Stock	Price	%	Major Group	Tax
*			=	=	=	=	A	A
1		ProductA	£0.50000	926	£1.00	50.00	MG1	No Tax Defined
2		ProductB	£1.70000			-2.00	MG1	Standard Tax
3		ProductC	£1.00000			52.00	MG1	Standard Tax
4		ProductD	£0.01000			0.00	MG1	No Tax Defined
5		ProductE	£0.80000			33.33	MG1	No Tax Defined

Select All in Filter Ctrl+A  
 Invert Selection Ctrl+I  
 Reset Grouping on Grid  
 Reset Filtering on Grid  
 Add to Print Queue  
 Add to Quick Compare  
 Revive Deleted Product

**Example2:** Showing the product grid after using the 'Select All in Filter' function.

	Code	Product Name	Cost	Current Stock	Price	%	Major Group	Tax
*			=	=	=	=	A	A
1		ProductA	£0.50000	926	£1.00	50.00	MG1	No Tax Defined
2		ProductB	£1.70000	903	£2.00	-2.00	MG1	Standard Tax
3		ProductC	£1.00000	405	£2.50	52.00	MG1	Standard Tax
4		ProductD	£0.01000	2	£0.01	0.00	MG1	No Tax Defined
5		ProductE	£0.80000	514	£1.20	33.33	MG1	No Tax Defined



## Product Maintenance (Continued)

### Invert Selection

This feature will invert the current selection.

Effectively de-selecting any products that where selected, and selecting any products that where not selected.

#### *To invert products currently selected*

1. 'Right Click' anywhere on the product grid, to display the context menu.

2. Click 'Invert Selection'

Or

1. Hold down the 'Ctrl' button on the keyboard and Press 'I'

**Example1:** Showing the product grid before using the 'Invert Selection' function.

	Code	Product Name	Cost	Current Stock	Price	%	Major Group	Tax
*			=	=	=	=	A	A
1		ProductA	£0.50000	926	£1.00	50.00	MG1	No Tax Defined
2		ProductB	£1.70000	903	£2.00	-2.00	MG1	Standard Tax
3		ProductC	£1.00000	405	£2.50	52.00	MG1	Standard Tax
4		ProductD	£0.01000	2	£0.01	0.00	MG1	No Tax Defined
5		ProductE	£0.80000	514	£1.20	33.33	MG1	No Tax Defined

**Example2:** Showing the function being selected from the 'Right-click Context Menu'

	Code	Product Name	Cost	Current Stock	Price	%	Major Group	Tax
*			=	=	=	=	A	A
1		ProductA	£0.50000	926	£1.00	50.00	MG1	No Tax Defined
2		ProductB	£1.70000	903	£2.00	-2.00	MG1	Standard Tax
3		ProductC	£1.00000	405	£2.50	52.00	MG1	Standard Tax
4		ProductD	£0.01000	2	£0.01	0.00	MG1	No Tax Defined
5		ProductE	£0.80000	514	£1.20	33.33	MG1	No Tax Defined

Select All in Filter    Ctrl+A  
 Invert Selection    Ctrl+I  
 Reset Grouping on Grid  
 Reset Filtering on Grid  
 Add to Print Queue  
 Add to Quick Compare  
 Revive Deleted Product

**Example3:** Showing the product grid after using the 'Invert Selection' function.

	Code	Product Name	Cost	Current Stock	Price	%	Major Group	Tax
*			=	=	=	=	A	A
1		ProductA	£0.50000	926	£1.00	50.00	MG1	No Tax Defined
2		ProductB	£1.70000	903	£2.00	-2.00	MG1	Standard Tax
3		ProductC	£1.00000	405	£2.50	52.00	MG1	Standard Tax
4		ProductD	£0.01000	2	£0.01	0.00	MG1	No Tax Defined
5		ProductE	£0.80000	514	£1.20	33.33	MG1	No Tax Defined

#### *To select a range of products*

1. Click on the first line that you want to select

2. Hold down the shift key

3. Whilst holding down the shift key, click the last line that you want to select.

## Product Maintenance (Continued)

### Grouping

By default the product maintenance screen lists all the products in your database without any grouping applied.

This feature can be used to group product information by set fields. (For example: Grouping the products by 'Major group'.)

Sub Grouping can also be applied allowing you Group by multiple fields in a hierarchical fashion. (For example: Grouping the products by 'Major Group' and further grouping the results by 'Supplier'.)

As is shown by the examples below:

**Note:** Any Grouping applied can be saved against the filter.

**Example1:** Showing the Product Maintenance screen not grouped, Note the area at the top of the product grid that states "Drag and Drop Column Header(s) here to group the data"

Drag and Drop Column Header(s) here to Group the data						
Code	Product Name	Cost	%	Tax	Major Group	Group
*		=	=	A	A	A
1	Product A	£0.50	50.00	No Tax Defined	Wet Sales	Draught
2	Product B	£0.50	50.00	No Tax Defined	Wet Sales	Draught
3	Product C	£0.50	50.00	No Tax Defined	Wet Sales	Bottles
4	Product D	£0.25	80.00	STD VAT	Wet Sales	Bottles
5	Product E	£0.65	48.00	STD VAT	Wet Sales	Bottles

**Example2:** Showing the Product maintenance screen grouped by the 'Group' field.

Group <span>▲</span>						
	Code	Product Name	Cost	%	Tax	Major Group
	*	<div><div>▼</div><div><div></div><div></div></div></div>	=		<div><div></div><div>A</div></div>	<div><div></div><div>A</div></div>
Group : Bottles (3 items)						
	Code	Product Name	Cost	%	Tax	Major Group
	3	Product C	£0.50	50.00	No Tax Defined	Wet Sales
	4	Product D	£0.25	80.00	STD VAT	Wet Sales
	5	Product E	£0.65	48.00	STD VAT	Wet Sales
Group : Draught (2 items)						
	Code	Product Name	Cost	%	Tax	Major Group
	1	Product A	£0.50	50.00	No Tax Defined	Wet Sales
	2	Product B	£0.50	50.00	No Tax Defined	Wet Sales

## Product Maintenance (Continued)

**Example3:** Showing the product maintenance screen grouped by the 'Major Group' field and sub-grouped by the 'Group' field.

Major Group <span>Δ</span>				
Group <span>Δ</span>				
Code	Product Name	Cost	%	Tax
*	<input type="checkbox"/>	=	=	<input type="text" value="A"/>
Major Group : Wet Sales (2 items)				
Group : Bottles (3 items)				
Code	Product Name	Cost	%	Tax
3	Product C	£0.50	50.00	No Tax Defined
4	Product D	£0.25	80.00	STD VAT
5	Product E	£0.65	48.00	STD VAT
Group : Draught (2 items)				
Code	Product Name	Cost	%	Tax
1	Product A	£0.50	50.00	No Tax Defined
2	Product B	£0.50	50.00	No Tax Defined

### To apply grouping and subgrouping

1. Move the mouse cursor over the field header that you wish to group by.
2. Click and hold down the left mouse button.
3. Drag the field header to the section above the field headers, which states: "Drag and Drop Header(s) here to Group the data"
4. Release the left mouse button

Grouping should now have been applied, and sub grouping can be applied in the same manner.

### Removing any Grouping applied.

Any grouping you have applied can be cleared in a single operation allowing you to view the full ungrouped list of products.

### To remove any Grouping applied.

1. Right Click the Product Maintenance screen to display the context menu
2. Select 'Reset Filtering on Grid'

### To remove any Grouping applied (Alternatively).

1. Click on the grouped box at the top of the screen
2. Hold down the left mouse button and drag the box over the grids header row.



## Product Maintenance (Continued)

### Customise View (Fields on Main Screen)

The fields displayed on the product grid can be customised. Allowing you to add or remove fields to fit your requirements. The fields on screen are saved as part of the filter, allowing you to create different layouts for different purposes, as shown in the examples below:

**Example1:** Showing the product grid with only stock related fields shown. Note: This has been saved as a filter called “Stock Fields” allowing it to be applied via the ‘Show Filters’ button, at any time.

Product Maintenance - Site #1 Site A (5/8) Stock Fields									
Add New ▾ Edit ▾ Delete ▾ Print ▾ Show Filters Show Customise View Default Prices ▾ Prices ▾ Stock Levels ▾ Price Level ▾ Price Modifier ▾ Show Deletions Show Reserved Analyse Save Open Windows									
Drag and Drop Column Header(s) here to Group the data									
Code	Cost	Qty on Order	Current Stock	Minimum Stock	Maximum Stock	Stockable?	Supplier		
*	=	☑	=	=	=	=	A		
1	£0.50	0	12	0	0	☑	Acme Ltd		
2	£0.50	0	6	0	0	☑	Bargin Buys		
3	£0.50	0	7	0	0	☑	Acme Ltd		
4	£0.25	0	14	0	0	☑	Bargin Buys		
5	£0.65	0	9	0	0	☑	Acme Ltd		

**Example2:** Showing the product grid with only ‘Cost’ and ‘Selling Price’ related fields shown.

Product Maintenance - Site #1 Site A (5/8) Cost And Price Fields									
Add New ▾ Edit ▾ Delete ▾ Print ▾ Show Filters Show Customise View Default Prices ▾ Prices ▾ Stock Levels ▾ Price Level ▾ Price Modifier ▾ Show Deletions Show Reserved Analyse Save Open Windows									
Drag and Drop Column Header(s) here to Group the data									
Code	Product Name	Cost	%	Tax	Average Cost	Expected Profit	Curr Cost SKUs	Price Level 1 Normal	
*	☐	☑	=	A	=	=	=	=	
1	Product A	£0.50	50.00	No Tax Defined	£0.50	£0.50	£0.50	£1.00	
2	Product B	£0.50	50.00	No Tax Defined	£0.50	£0.50	£0.50	£1.00	
3	Product C	£0.50	50.00	No Tax Defined	£0.50	£0.50	£0.50	£1.00	
4	Product D	£0.25	80.00	STD VAT	£0.25	£1.00	£0.25	£1.50	
5	Product E	£0.65	48.00	STD VAT	£0.65	£0.60	£0.65	£1.50	

**Example3:** Showing a reduced field selection, showing just ‘Code’, ‘Current stock’ (by unit and SKU), and the products ‘Shelf’ and ‘Storage’ areas. **Note:** This section includes a User Created Field for ‘Storage Area’

Product Maintenance - Site #1 Site A (5/8) Stock Location Fields									
Add New ▾ Edit ▾ Delete ▾ Print ▾ Show Filters Show Customise View Default Prices ▾ Prices ▾ Price Level ▾ Price Modifier ▾ Show Deletions Show Reserved Analyse Save Open Windows									
Drag and Drop Column Header(s) here to Group the data									
Code	Current Stock	Shelf Location	Current Stock SKU	Stock Unit	Storage Area				
*	=	☑	A	=	A				
1	12	Middle Shelf	1.00	Dozen	Storage Area 1				
2	6	Top Shelf	1.00	Half Dozen	Storage Area 1				
3	7	Middle Shelf	1.17	Half Dozen	Storage Area 2				
4	14	Lower Shelf	0.19	9 Gallon Keg	Storage Area 2				
5	9	Lower Shelf	0.13	9 Gallon Keg	Storage Area 3				

## Product Maintenance (Continued)

### *To Customise view (Fields on main screen)*

1. Click 'Customise View'
2. Tick or un-tick the fields to add or remove them from the screen

**Note:** The order that the fields display on screen (left to right) can be changed by clicking and dragging the fields to their new position, or dragging them directly from the 'Customise View List' to the position where they are required.

### List of Fields that can be added to the product screen

- |                             |                             |
|-----------------------------|-----------------------------|
| • % (Profit Percent)        | • Average Cost              |
| • Average Cost SKUs         | • Code                      |
| • Cost                      | • Curr Cost SKUs            |
| • Current Stock             | • Current Stock SKUs        |
| • Date Added                | • Date Modified             |
| • Days Holding              | • Description (Long)        |
| • Display Type Qty          | • Embedded                  |
| • Exp. Lead Time            | • Expected Profit           |
| • Group                     | • Group Code                |
| • Index Code                | • Last 30 Days              |
| • Last 4 Weeks              | • Last 7 Days               |
| • Last User                 | • Linked Product Index Code |
| • Major Group               | • Major Group Code          |
| • Maximum Profit Percentage | • Maximum Stock             |
| • Minimum Profit Percentage | • Minimum Stock             |
| • Mixture                   | • Month To Date             |
| • Multiplier                | • Price Level 1 Normal      |
| • Print Label               | • Product Code (Formatted)  |
| • Product Name              | • Qty To Date               |
| • Qty on Order              | • Shelf Location            |
| • Status                    | • Stock Unit                |
| • Stockable                 | • Supplier                  |
| • Suppliers RRP             | • Tax                       |
| • Updates                   | • Weekly To Date            |
| • Year To Date              |                             |

## Product Maintenance (Continued)

### Adding Products

Products can be added to the database in the following ways:

1. **Add New** – Adds a new product
2. **Add Using Current** – Adds a new product based on an existing product
3. **Add Range** – Adds a range of products (eg Codes 1 – 100)
4. **Add Using Template** – Adds a new product based on a product template

#### *To add a new product using 'Add New'*

1. Click 'Add New'
2. Fill in all the relevant product details
3. Click 'Save'

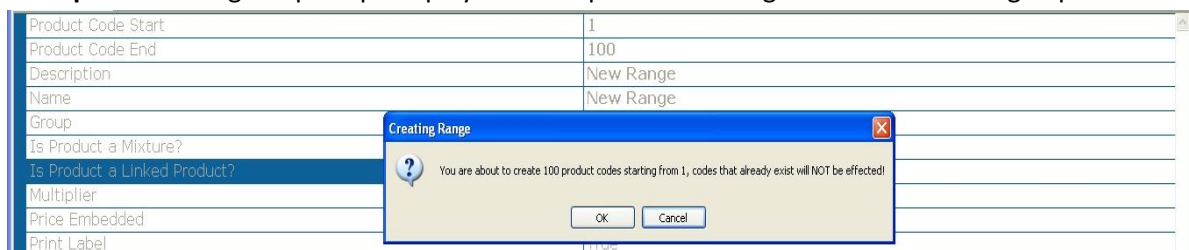
#### *To add a new product using 'Add Using Current'*

1. Select an existing product upon which to base your new product
2. Click 'Add Using Current' (Accessed via the dropdown arrow displayed to the right of the 'Add New' button)
3. Fill in all the relevant product details (Note: Some will have been filled in for you due to using 'add using current')
4. Click 'Save'

#### *To add a new product using 'Add Range'*

1. Click 'Add Range' (Accessed via the dropdown arrow displayed to the right of the 'Add New' button)
  2. Enter a range (By setting 'Product Code Start' and 'Product Code End')
  3. Fill in all the relevant product details
  4. Click 'Save'
- You will be prompted informing you how many products you are trying to create, and the starting product code. Along with the warning that "Codes that already exist will NOT be effected"
5. Click 'OK'

**Example1:** Showing the prompt displayed at the point of clicking save on an add range operation



## **Product Maintenance (Continued)**

To add a new product using 'Add Using Template'

1. Click 'Add Using Template' (Accessed via the dropdown arrow displayed to the right of the 'Add New' button)
2. Click the template you wish to use as a basis for you new product. (Templates must be setup to be selected here)
3. Fill in all the relevant product details (Note: Some will have been filled in for you due to using 'Add using template')
4. Click 'Save'

See page 47 for more information about the product details that can be entered.

## Product Maintenance (Continued)

### Editing

Products details for products which already exist can be altered via the edit function, which allows you to edit product(s) individually or as a batch.

In order to carry out an edit you must have a valid product or products selected, if this is not the case you will be prompted accordingly.

**Example1:** Showing the prompts displayed if you attempt to edit with no product selected, or the product is currently being updated.



**Example2:** Showing the prompt displayed if you attempt to edit a product which has been fully deleted. This product may still show on your screen if it has been deleted by another user and the screen has not yet refreshed.



## Product Maintenance (Continued)

### *To Edit a Single Product*

1. Select the product you wish to edit
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

### *To Edit Multiple Products (Individually)*

1. Select the products you wish to edit
2. Click 'Individual Edit' (Accessed via the dropdown arrow displayed to the right of the 'Edit' button)
3. Make the changes required
4. Click 'Save'

**Note:** Multiple selection is done via holding the 'Ctrl' or 'Shift' keys on the keyboard during selection, for more information on this see the section about selecting products on page 35.

**Note:** As opposed to clicking save on each individual edit screen, you can save them all in one go using the 'Save Open Windows' feature. (Accessed via the dropdown arrow displayed to the right of the 'Edit' button)

### *To Edit Multiple Products (via Batch Edit).*

1. Select the products you wish to edit
2. Click 'Edit'  
Or  
Click 'Batch Edit' (Accessed via the dropdown arrow displayed to the right of the 'Edit' button)
3. Make the changes required
4. Click 'Save'

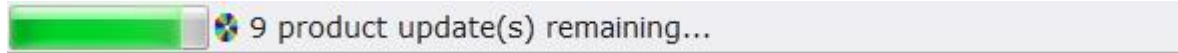
**Note:** Multiple selection is done via holding the 'Ctrl' key on the keyboard during selection, for more information on this see the section about selecting products.

See page 47 for more information about the product details that can be entered.

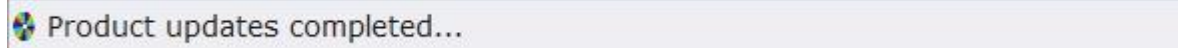
## Product Maintenance (Continued)

### Saving of Products

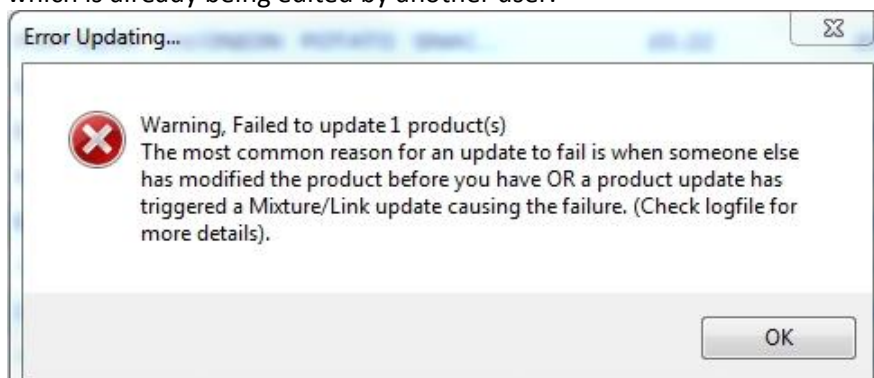
When saving products, a progress bar will be displayed at the bottom of the screen, informing you of the amount of product updates remaining.



When the updates complete the text "Product Updates Completed" will be briefly displayed.



If any of the updates fail, you will be prompted with a warning which will include the number of products which failed to update. One reason this may happen is if you attempt to save a product which is already being edited by another user.



## Product Add/Edit (Fields and Features).

This section begins with a quick overview of all the fields displayed on the product add/edit screen, followed by sections handling specific fields and its functions (where required).

### Explanation of Fields Displayed on Product Add/Edit

#### Explanation of fields in general information

**Product Index** – Internal reference number (This cannot be changed)

**Product Code** – This can be a barcode or a sequential number used to identify the product in sales and stock transactions.

**Description** – This is the full description used on reports

**Name** – This is name as it appears on the POS

**Group** – This is the group that the product belongs to

**Is Product a Mixture** – Is the product a mixture?

**Mixture Code** – The mixture to which this product links (If the product is set as a mixture)

**Is Product a Linked Product** – Is the product a linked product? (Sends all sales to another product)

**Linked Product Code** – The product to which this product links (If the product is set as a linked product)

**Print label** – Allows label software to print a label for this product

**Stockable Item** – Set to true if you are holding stock for this item

**SKU (Pack)** – Select from the drop down list the SKU size for this product

#### Explanation of fields in Costing

**Current Unit Cost** – This is the latest cost price held by the system

**Current SKU Cost** – This is the latest cost price held by the system for the SKU (Pack)

**Tax Code** – Allocates a tax code to the product from the drop down list

**Suppliers RRP** – This is the suppliers RRP not necessarily the same as the POS

**Selling Price** – This is the standard price of the product and is sent to the POS

**Ex. Tax Price** – This is the net selling price ie sales price minus the tax

**Tax Content** – Tax content of the selling price. This cannot be edited.

**Profit** – The monetary profit you make when the product is sold

**Profit as %** – The ex-tax margin of profit in the selling price

**Markup Profit as %** – The Markup % of profit

**Minimum Profit as %** – The Minimum Gross Margin % of profit contained in the selling price

**Maximum Profit as %** – The Maximum Gross Margin % of profit contained in the selling price

#### Explanation of fields in Price Levels

**Level 1 Normal** – Modifier 1 price

**Level 1 Half** – Modifier 2 price

**Level 1 Double** – Modifier 3 price

**Level 2 Normal** – Modifier 1 price

**Level 2 Half** – Modifier 2 price

**Level 2 Double** – Modifier 3 price



## Product Add/Edit (Fields and Features) (Continued)

### Explanation of Modifiers

Modifiers are used to change the quantity sold when an item is sold on the PoS. For example a modifier could be called "half", and it used to change a quantity from 1 to ½. Other modifiers could be for doubles (for spirits), or for glasses of wine. Each product can have its own selling price per modifier. For example, a pint might sell for £2.00, but you could sell a half pint for £1.50.

### Explanation of Price Levels

Price levels are used to change the price of an item when an item is sold on the PoS. For example a pub might have a "happy hour", when all the prices are changed for a period of time. You could create a price level for "happy hour", or a "lunch menu". Each product can have its own selling price per price level. For example, a pint might sell for £2.00, but during "happy hour", the price might be £1.00.

Note: Price levels and modifiers can be combined to produce a range of selling prices. By default Total Control Premier creates 7 price levels, and 5 modifiers per level, giving 35 different selling prices per product. This can be extended to include more price levels and/or modifiers if required.

### Explanation of Stock Information

**Outer Pack Barcode** – The barcode/product code assigned to the Outer Pack (Case).

**Outer Pack SKU** – The outer pack stock keeping unit.

**Current Stock (Units)** – This field shows the 'Current Stock' (in units). Note that only when a new product is created can the opening stock be entered here. Subsequently the 'Current Stock' will be updated automatically from sales and the stock system.

**Current Stock (SKU's)** - This is the same as the above but shows the stock as SKU quantities.

**Minimum Stock (Units)** – This is the minimum stock in units you wish to hold. Enter a value here if you want to use automatic ordering.

**Minimum Stock (SKU's)** – Similar to the above but the stock is entered as an SKU quantity instead of units.

**Maximum Stock (Units)** - This is the maximum stock in units you wish to hold. Enter a value here if you want to use automatic ordering.

**Maximum Stock (SKU'S)** – Similar to the above but the stock is entered as an SKU quantity instead of units.

**Days Holding** – This is the number of days you wish to hold stock for and is for reference only.

**Expected lead time** - This is the number of days between ordering and receiving the product and again is for reference only.

**Default Supplier** – This is the default supplier for the product and is a drop down field. It is used by the automatic ordering system but can be over-ridden when placing an order. You can also force the ordering system to ONLY allow orders for a products default supplier (General Option – Stock Options – General Stock – Allow Supplier Allocated Products Only).

**Shelf Location** –The field is a drop down and is used to link a shelf location to a product. This is then used for stocktaking and reporting. This field is only visible if you have created shelf locations.

## Product Add/Edit (Fields and Features) (Continued)

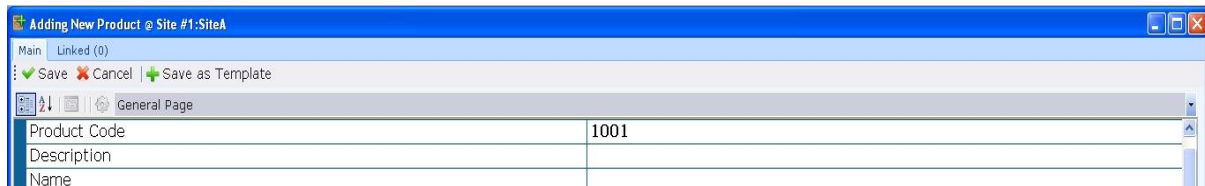
### Product Code

Each product requires a 'Product Code' which is used to reference the product for sales and stock transactions, as well as for reporting. This can be a barcode or just a sequential number but must be unique to the product.

### Setting a Products Code ('Auto get next free code', 'Manual entry', and 'Creating valid barcodes')

By default on attempting to add a new product to the database, the system will automatically assign the next free product code. So if you have 1000 Products, attempting to add an additional product would result in the 'Product Code' field being auto-populated with the number '1001'.

**Note:** This functionality can be turned off for cases where 'Add using Current' is used, via a general option.



The screenshot shows a window titled 'Adding New Product @ Site #1:SiteA'. It has a menu bar with 'Main' and 'Linked (0)'. Below the menu bar is a toolbar with 'Save', 'Cancel', and 'Save as Template' buttons. The main area is a table with three rows: 'Product Code' (containing '1001'), 'Description' (empty), and 'Name' (empty).

Product codes can be manually entered, at which point the system automatically checks if that code is already in use at any sites within the site group. If this is the case the user will be prompted, and would need to select a different code that was available for use.



The screenshot shows a 'Validation Error' dialog box. It contains an information icon and the following text: 'Product Code 237 has already been used. Possibly at another site within this site group! If you are re-using a Product code that has been deleted, you must ensure that the deleted Product has a status of DELETED, if it is still PENDING DELETION then send your deletions to the POS.' There is an 'OK' button at the bottom.

**Note:** The 'F3' key (on the keyboard) can be used to add the next sequential code not in use.

**Note:** The 'F5' key (on the keyboard) can be used to append a 'check digit' to the end of the code. The reason for this is when you are generating your own barcodes. In order for a barcode to scan correctly it must end in a valid 'Check Digit'. Whilst this can be calculated manually it is far easier to have the system do this automatically.

**For example:** Entering a bar code of '500022600474' and pressing 'F5' would append the check digit '0' to the code, resulting in a valid barcode of '5000226004740'.

## Product Add/Edit (Fields and Features) (Continued)

### Changing a Products Code

A products code can be changed, even after a product has been created and saved.

Editing an existing product and changing its code will result in a prompt, informing them what number the code would be changed from and to, with the option to delete the original code from the PoS.



Answering Yes or No will result in the code changing in Total Control Premier.

- Selecting '**No**' and sending updates to the PoS, would result in the code being changed on the PoS but the old code and product will remain on the PoS.
- Selecting '**Yes**' and sending updates to the PoS, would result in the code being changed on the PoS, and the old code will be deleted on the PoS.
- Selecting '**Cancel**', would abort the attempt to change the code.

**Warning:** Whilst this situation is correctly handled in Total Control Premier, so new sales and old sales will show against the same product on sales reports. This is not the case with the POS, and therefore running a sales report for the new code (on the PoS) would not include the sales prior to the code being changed.

### Auto setting Product code via group selection

Product groups have a 'Start Product Codes From' field which is optional.

When adding a product, and setting its group link via the 'group' field, the system checks if the selected group has a value set here, and if so prompts with the option to get the 'next free product code' starting from that number.

The main purpose for this is so that all products within a group then have sequential numbers, whilst not required this can make managing your products easier.

## Product Add/Edit (Fields and Features) (Continued)

### *To automatically use the next free 'Product Code' based on 'Group' selection*

1. When adding a product, set the 'Group' field to a Group which has a 'Start Product Codes from' value set against it.
2. You will be prompted with the option to 'Renew next free code'.
  - Selecting '**Yes**', will obtain the next available product code, starting from the groups product starting code.
  - Selecting '**No**' will not alter the product code field

**Example1:** Showing the prompt displayed when user set the 'Group' field to 'Mains', a Group which has a starting code of '1100' set against it.

Product Code	7
Description	
Name	
Group	Mains
Is Product a Mixture?	
Is Product a Linked Product?	
Multiplier	
Price Embedded	
Print Label	
Picture	<input type="checkbox"/> (none)
Stockable Item?	True

**Renew Next Free Code?**

The Group selected has a Product Code range set, would you like to get the next Free Product Code starting from 1100

Yes No

**Example2:** Showing the same screen as 'Example1', after you have clicked 'Yes' on the prompt. Note that the number 7 shown in the 'Product Code' field in example 1, has been replaced with the Number 1100. If this number had been in use by another product then clicking 'Yes' to the prompt would have offered, the code 1101 instead.

Product Code	1100
Description	
Name	
Group	Mains
Is Product a Mixture?	False
Is Product a Linked Product?	False
Multiplier	1.0000
Price Embedded	False
Print Label	True
Picture	<input type="checkbox"/> (none)
Stockable Item?	True

### Product Add/Edit (Fields and Features) (Continued)

## Linking a product to another product

All products have a 'Linked Product Code' field, which allows you to link one product to another. In this situation, all sales and stock updates are automatically transferred to the 'main' code. This is typically used in the case of promotional items where a product is given a temporary new barcode for the duration of the promotion. If you do not want your sales and stock reports to be kept separate for the promotion, you would link the promotion code to the main code. When you look at any stock or sales reports, you will only see a total for the 'main' code.

### *To link a product to another product*

1. When adding or editing a product that you wish to link to a 'main' product, set the 'Is Product a Linked Product' value to 'True', which will cause the 'Linked Product Code' setting to be displayed.

Is Product a Linked Product?	True
Linked Product Code	<a href="#">Click Here to Search for Product -&gt;</a>

**Note:** As this point you may be prompted with the option to 'Turn on Update Linked Product Costs'

2. Access the 'Product Search Screen', via the browse button (...).

**Product Search - Select the Product you want to LINK to**

Code

Drag and Drop Column Header(s) here to Group the data

Code	Description	Cost	Price	Tax	Group	Ma
*	<input type="text"/>	=	=	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	ProductA	£20.00	£40.00	Standard Tax	G1a	MG
2	ProductB	£1.70	£2.00	Standard Tax	G1a	MG
3	ProductC	£1.00	£2.50	Standard Tax	G1a	MG
4	ProductD	£0.00	£10.00	No Tax Defined	G1a	MG
5	ProductE	£0.80	£1.20	No Tax Defined	G1a	MG
10	Main Product	£0.00	£0.00	No Tax Defined	G1a	MG

Complete

3. Locate and select the required 'main' product to which you wish to link to.
4. Click 'Select'.
5. You should now see the 'main' product displayed in the 'Linked Product Code' setting.

Is Product a Linked Product?	True
Linked Product Code	10 - Main Product

6. At the point of saving the 'linked' product, you will be prompted with the option to transfer any stock values currently against the 'linked product' to the 'main' product.

- Selecting **'Yes'** will transfer the stock to the 'main' product
- Selecting **'No'** will leave the stock values against the 'linked' product

Transfer Stock

You are linking this product to another product, do you want to transfer any existing stock from this product to its linked (main) product?

Yes

No

**Note:** At this point you may be prompted about Cyclic Loops (See: following page)

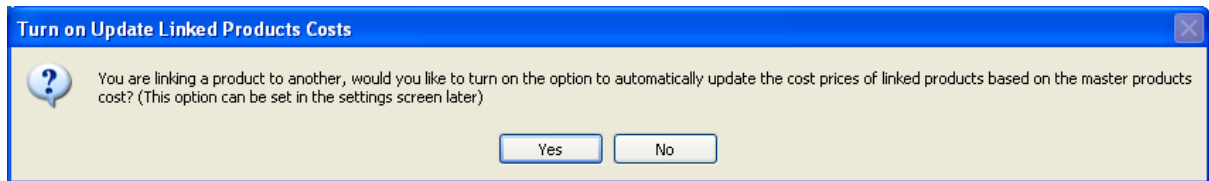
## Product Add/Edit (Fields and Features) (Continued)

### Update Linked Product Costs Option.

When enabled this option causes the system to set the 'Cost Prices' of any 'linked' product to be the same cost as the 'main' product, at the point of saving the 'main' product.

If this option is not currently enabled, then the first time you attempt to link a product, you will be prompted with the option to automatically enable this feature.

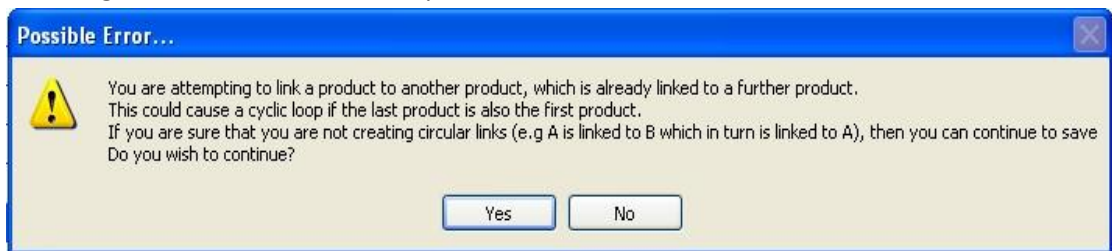
The prompt would be displayed at the point of changing the 'Is Product a Linked Product?' field to 'True'



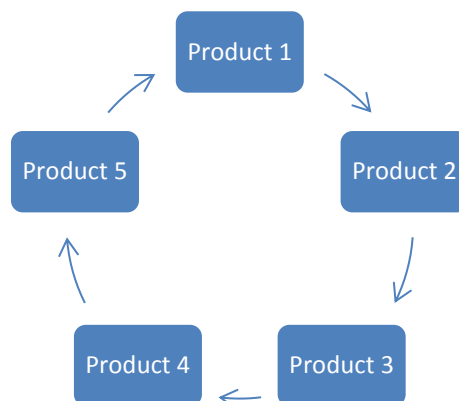
### Cyclic Loops

At the point of attempting to save a 'linked' product, the system checks to see if the 'main' product is itself a 'linked' product. If this is found to be the case the following warning will be displayed.

- Selecting 'Yes' will save the product
- Selecting 'No' will cancel the attempt to save.



**Example 1:** An invalid 'cyclic' loop. This would create a never ending circle, as sales for product 1 are passed to product 2, then to product 3, product 4, product 5, then back to product 1 again.



## Product Add/Edit (Fields and Features) (Continued)

### Linked and Linked To Tabs

When adding or editing a linked product, or a main product, two additional tabs titled 'Linked' and 'Linked To' can be used to see relevant linking information.

A 'linked' product linked will display a 'Linked To' tab at the top of the Add/Edit screen. Accessing this tab will show details of the 'main' product to which it is linked.

If required, the 'main' product can be opened for edit directly from this tab, by clicking the 'Edit' button.

**Example1:** Showing the 'Linked To' Tab of a 'linked' product.

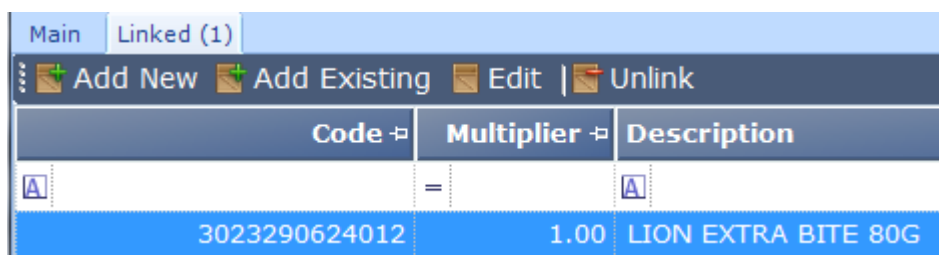


A product which has other products linked to it will display a 'Linked' tab at the top of the Add/Edit screen. Accessing this tab will show details of the products that are linked to it.

The following options are available from this tab.

- **Add New** –Opens up a new 'Add Product' window, with the link to the 'main' product already in place.
- **Add Existing** –Opens up the 'Product Search' screen, ready to select an already existing product for use as a 'linked' product, linking it to the 'main' product.
- **Edit** –Opens the selected 'linked' product for edit.
- **Unlink** –Unlinks the selected 'linked' product from the 'main' product.

**Example2:** Showing the 'Linked' Tab of a 'main' product.





## Product Add/Edit (Fields and Features) (Continued)

### Linked Product Index Code

In addition to the 'Linked' and 'Linked To' tabs displayed on add/edit of 'linked' or 'main' products, it is also possible to see which products are linked to other products from the main 'Product Maintenance Screen', via the fields 'Index Code' and 'Linked Product Index Code'. Adding these fields to the layout (via 'Customise View' button) allows you to see these links.

Index Code	Code	Product Name	Linked Product Index Code
=	*	<input type="checkbox"/>	=
11459	3023290624012	LION EXTRA BITE 80G	11460
11460	3023290624128	LION BAR 55G	0

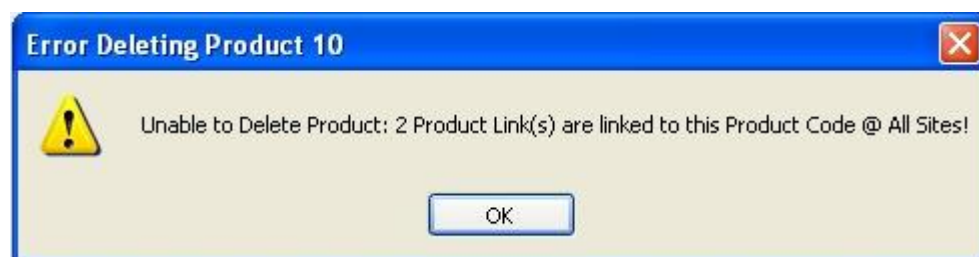
Filtering on the 'Linked Product Index Code' field using '>0' would only show the products that are linked to another code.

Index Code	Code	Product Name	Linked Product Index Code
=	*	<input type="checkbox"/> <input type="text"/>	=
11459	3023290624012	LION EXTRA BITE 80G	11460

### Deleting Linked Products

Whilst 'linked' products can be freely deleted, a 'main' product cannot be deleted whilst any links remain in place. Attempting to delete a 'main' product (one that has other products linked to it) will cause a prompt to be displayed.

In order to delete the 'main' product you would need to locate all the products that are linked to it, and unlink them, prior to attempting to delete the 'main' product.



For more information on product deletions, see page 62.

### Setting a Product to be a Mixture

Mixtures are used when one product is made up of several sub products. A mixture is created by adding the mixtures elements and setting the quantities required to make one of the mixture. A new product can then be added, set as a mixture, and linked to the mixture.

**Note:** Mixtures are setup via the 'Mixtures' screen, and products are set as being that mixture via the 'Product Maintenance' Screen.

All Products have a 'Mixture Code' field, which allows you to set a product as being a set mixture. Sales of this product can then be set to take stock from either this main mixture product or individually from the element products that make up the mixture, dependent on mixture setup.



## Product Add/Edit (Fields and Features) (Continued)

### To set a product as a Mixture

1. When adding or editing the product, you wish to set as being a mixture, set the 'Is Product a Mixture?' field to 'True', which will cause the 'Mixture Code' field to be displayed.

Is Product a Mixture?	True
Mixture Code	

2. Access the Mixture Selection, Via the dropdown menu button (  )

Mixture Code			
Multiplier	Code ▼ Description ▼ Price ▼		
Price Embedded	1	Mixture 1	10
Print Label	2	Mixture 2	20
Picture	3	Mixture 3	30
Stockable Item?			
SKU (Pack)			

3. Locate and select the required 'Mixture' which you wish to use.
4. You should now see the 'Mixture' displayed in the 'Mixture Code' field

Is Product a Mixture?	True
Mixture Code	Mixture 1

5. At this point the fields in the 'Costing' section automatically be populated, based upon the information stored against the selected mixture.

- **Current Unit Cost**
- **Current SKU Cost**
- **Tax Code**
- **Selling price**
- **Ex. Tax price**
- **Tax Content**
- **Profit**
- **Profit As %**
- **Mark Up Profit as %**

<b>Costing</b>	
Current Unit Cost	£5.7500000
Current SKU Cost	£5.7500000
Tax Code	Standard Tax
Suppliers RRP	£0.00
Selling Price	£10.00
Ex. Tax Price	£8.33
Tax Content	£1.67
Profit	£2.58
Profit As %	31.0000
Markup Profit As %	44.9275

**Note:** These fields can be manually altered if required.

**Note:** When updating a Mixture via the mixture screen you can set it to auto update the costs against this Mixture Product.

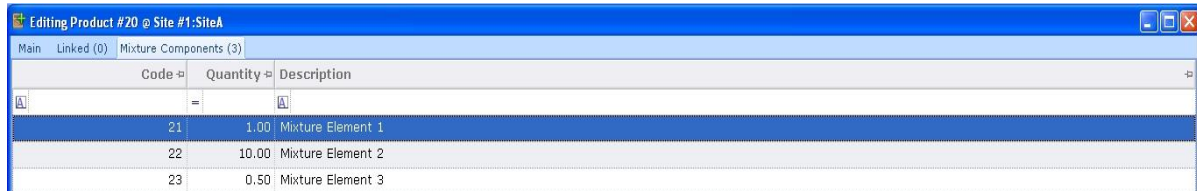
### 'Mixture Components' and 'Component of Tabs

When adding or editing a Product which is set to be a mixture, or which is itself an element of a mixture. Two additional Tabs titled 'Mixture Components' and 'Component Of' can be used to see relevant mixture information.

## Product Add/Edit (Fields and Features) (Continued)

A product set as a mixture will display a 'Mixture components' tab at the top of the Add/Edit screen. Accessing this tab will show details of the 'Mixture' which it is set as.

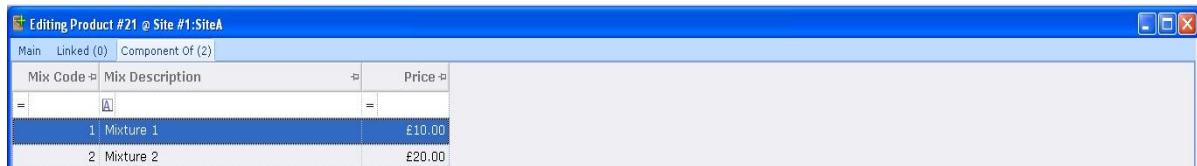
**Example1:** Showing the 'Mixture Components' Tab of a product set as a mixture.



Code	Quantity	Description
21	1.00	Mixture Element 1
22	10.00	Mixture Element 2
23	0.50	Mixture Element 3

A product which is itself an element of a mixture will display a 'Component Of' tab at the top of the Add/Edit screen. Accessing this tab will show details any mixture of which the product is an element.

**Example2:** Showing the 'Component Of' tab of a product which is an element of a mixture.



Mix Code	Mix Description	Price
1	Mixture 1	£10.00
2	Mixture 2	£20.00

### Mixture Field

In addition to the 'Mixture Components' tab displayed on add/edit of a product set as a mixture. It's also possible to see which Products are set as which mixtures from the main 'Product Maintenance Screen', via the field 'Mixture'. Adding this field to the layout (via the 'Customise View' button) allows you to see any product which are set as a Mixture and the name of the mixture.

	Code	Product Name	Mixture
*		<input type="checkbox"/>	<input type="text"/>
	20	Mixture Product 1	Mixture 1
	21	Mixture Element 1	N/A
	22	Mixture Element 2	N/A
	23	Mixture Element 3	N/A

Filtering on the 'Mixture' field using '≠' (Not equal to) and 'N/A' (Not applicable) would only show the product which are set as mixtures and the name of the mixture.

	Code	Product Name	Mixture
*		<input type="checkbox"/>	≠ N/A <input type="button" value="v"/> <input type="button" value="x"/>
	20	Mixture Product 1	Mixture 1

## Product Add/Edit (Fields and Features) (Continued)

### Deleting Mixture Products

Whilst a Product set as a mixture can be freely deleted. Products which are themselves elements of a mixture cannot be deleted whilst any links remain in place.

Attempting to delete a 'Mixture element', will cause a prompt to be displayed.

In order to delete the 'Mixture element' you would need to locate the mixture and remove the element from it, prior to attempting deletion.



For more information on product deletions, see page 62.

## Product Add/Edit (Fields and Features) (Continued)

### Current Unit Cost & Current SKU Cost

'Current unit cost' is the cost per individual unit whereas 'Current SKU Cost' is the cost per Stock Keeping Unit.

Meaning that:

- 'Current Unit Cost' is the 'Current SKU Cost' divided by the 'SKU (Pack) Size'
- 'Current SKU Cost' is the 'Current Unit Cost' multiplied by the 'SKU (Pack) Size'

Setting either of these 3 fields, causes other fields to be automatically updated based on the calculations above.

Due to the possibility of rounding, Total Control Premier will show cost prices with 10 decimal places (2 as standard plus 8 additional). This can be adjusted via the general option 'Cost Price Additional Decimal Places'.

**Example1:** Setting of value for 'SKU (Pack)' and 'Current Unit Cost' has caused the system to auto calculate the 'Current SKU Cost' Field

SKU (Pack)	5 Pack
Costing	
Current Unit Cost	£0.5000000000
Current SKU Cost	£2.5000000000

**Example2:** Changing the 'SKU (Pack Size)' from '5 Pack' to '10 Pack' has caused the 'Current SKU Cost' field to be automatically recalculated.

SKU (Pack)	10 Pack
Costing	
Current Unit Cost	£0.5000000000
Current SKU Cost	£5.0000000000

**Example3:** Changing the 'Current Unit Cost' from '£0.50' to '£1.00' has caused the 'Current SKU Cost' field to be automatically recalculated.

SKU (Pack)	10 Pack
Costing	
Current Unit Cost	£1.0000000000
Current SKU Cost	£10.0000000000

**Example4:** Changing the 'Current SKU Cost' from '£10.00' to '£15.00' has caused the 'Current Unit Cost' field to be automatically recalculated.

SKU (Pack)	10 Pack
Costing	
Current Unit Cost	£1.5000000000
Current SKU Cost	£15.0000000000

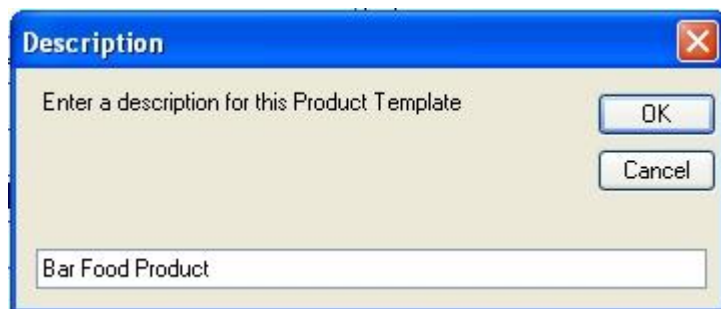
## Product Add/Edit (Fields and Features) (Continued)

### Product Templates

Templates allow you to predefine the common settings for a product, as apposed to starting with a blank record. This can be used to speed up the product creation process, where multiple products use similar settings.

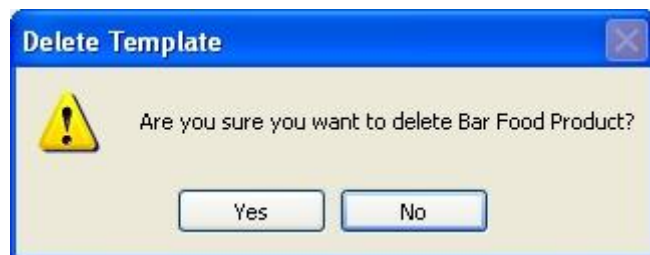
#### *To Create a Product Template*

1. Add a Product, setting any required fields
- Or
1. Edit a Product, which already has the required fields set
2. Click 'Save as Template'
3. Enter a description for the Product Template
4. Click 'OK'



#### *To Delete a Product Template*

1. Click 'Delete Existing Template' (Accessed via the dropdown arrow displayed to the right of the 'Add New' button)
2. Click the Template you wish to delete. (Templates must be setup to be selected here)
3. You will be prompted to confirm deletion, Click 'Yes'



## Product Add/Edit (Fields and Features) (Continued)

### To add a new product using 'Add Using Template'

1. Click 'Add Using Template' (Accessed via the dropdown arrow displayed to the right of the 'Add New' button)
2. Click the Template you wish to use as a basis for you new product. (Templates must be setup to be selected here)
3. Fill in all the relevant product details (Note: Some will have been filled in for you due to using 'Add using template')
4. Click 'Save'

Group	Current Packs	Curr Cost Pack	Supplier Ref Co	Storage Area Code
1 Normal	£169.20000	£2.50000	LV426-A	Storage Area 1

### Stock levels Form

The Stock levels form can be used to check the 'Current Stock Level' for a selected product.

Individual values are displayed for each site, with current stock amount being shown as both pack and unit quantities.

### To View The Current Stock Form For A Selected Product.

1. Select the required product
2. Click the 'Stock Levels' button

**Note:** If multiple products are selected prior to accessing the 'Stock levels form', the form will be displayed multiple times, once per selected product.

**Example1:** Showing the current stock levels for 'Product C' as both 'pack' and 'unit' quantity across both sites.

Drag and Drop Column Header(s) here to Group the data				
Site	Description	Pack Qty	SKU	Unit Qty
<input type="checkbox"/>	<input type="checkbox"/>	=	<input type="checkbox"/>	=
Site 1	LION BAR 55G	21.667	Dozen	260.000
Site 2	LION BAR 55G	20.000	Dozen	240.000

## Product Add/Edit (Fields and Features) (Continued)

### Product deletions

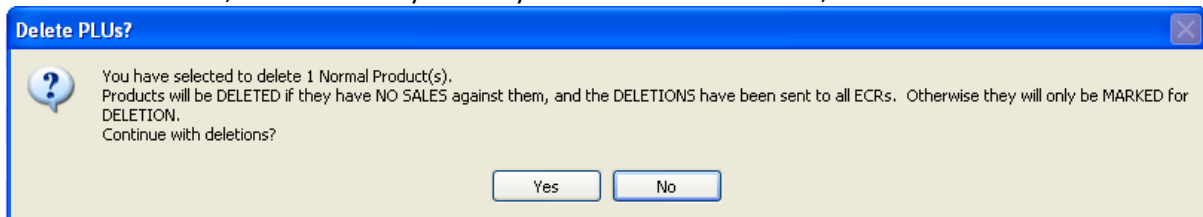
Products can be deleted from the database, which will cause the product to be removed from the PoS at the point of updates being sent.

For a product to be deleted, various checks are made against the product. Total Control Premier will not allow a product to be deleted if:-

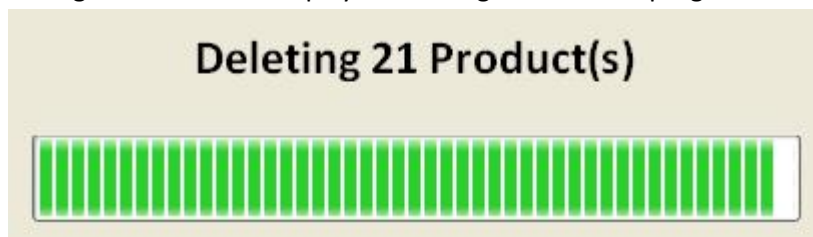
- It has sales
- It exists on a stock transaction
- It is part of a mixture
- It has other products linked to it
- It is part of a multi-buy

### To delete a Product

1. Select the Product(s) for deletion
2. Click 'Delete'
3. You will be prompted informing you that:  
"Products will be DELETED if they have NO SALES against them, and the DELETIONS have been sent to all PoS, Otherwise they will only be marked for deletion", Click 'Yes' to continue.



4. A Progress bar will be displayed showing the deletion progress.



5. Followed by a prompt upon completion of the operation, again clarifying that: "Product marked for Deletion, this product will be deleted from the POS on the next communication session. After which the Product will be deleted if NO sales are found, however if sales do exist, the product will remain on record for sales purposes ONLY"





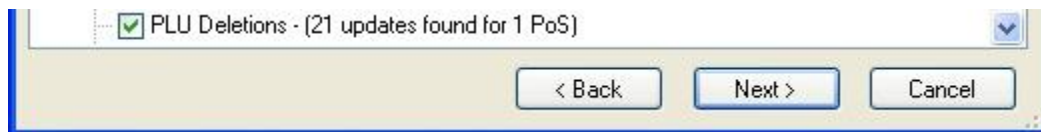
## Product Add/Edit (Fields and Features) (Continued)

6. At this point the products status will change from “Normal” to “Pending Deletion”

Status	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier
Normal	7	ProductG	£0.00000	£0.00	MG1	G1a	-10	0	<input checked="" type="checkbox"/>	0

Pending Deletion	7	ProductG	£0.00000	£0.00	MG1	G1a	-10	0	<input checked="" type="checkbox"/>	0
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7. The Product will remain at status ‘Pending Deletion’, and show as an update ready for communication to PoS.



8. When this communication has occurred, the product will be completely removed from the system if no sales exist for it. Otherwise it will change status to ‘Deleted’ but not be removed from the system. Allowing you to still access sales or other information when required.

Deleted	7	ProductG	£0.00000	£0.00	MG1	G1a	-10	0	<input checked="" type="checkbox"/>	0
---------	---	----------	----------	-------	-----	-----	-----	---	-------------------------------------	---

9. When the product has been deleted its code can be reused, as another product.

Deleted	7	ProductG	£0.00000	£0.00	MG1	G1a	-10	0	<input checked="" type="checkbox"/>	0
Normal	7	ProductG2	£0.50000	£1.00	MG1	G1a	0	0	<input checked="" type="checkbox"/>	0

### Deleting A Product When It Exists In A Stock Transaction.

At the point of attempting to delete a product the system checks if the product exists in any ‘None Committed’ Stock Transactions. If any transactions are found which contain the product, you will be prompted that deletion cannot occur whilst the product is linked to these transactions, with the option given to continue, and automatically remove the product from the relevant transactions.

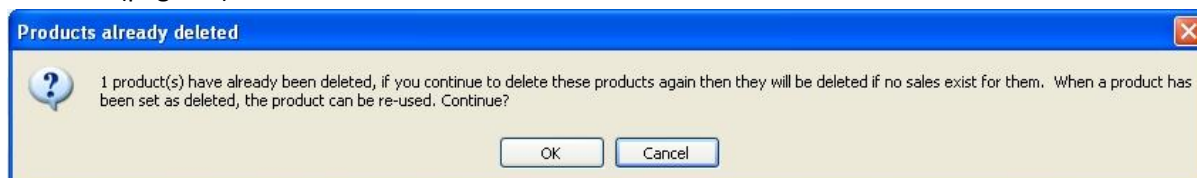




## Product Add/Edit (Fields and Features) (Continued)

### *Deleting a Linked Or Mixture Product*

Products which are linked to other product, or are an element which makes up a mixture, cannot be deleted. Attempting to do this while these links remain would cause you to be prompted. Details of how to handle this situation can be found in the relevant sections here on linking (page 52) and mixtures (page 47).

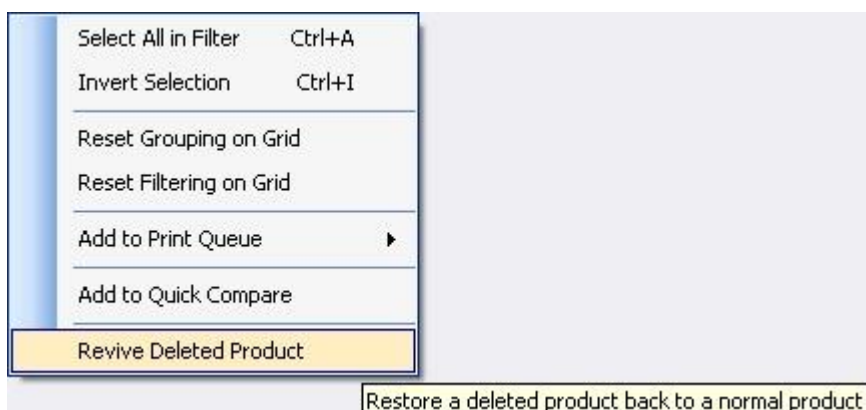


## Product Revival

Products in 'Pending Deletion' status can be revived (reverted back to a status of "normal").

### *To revive a Deleted Product*

1. Select the deleted product(s) to revive.
2. Right-click on the screen, to display the context menu
3. Select 'Revive Deleted Product'



4. You will be prompted to confirm revival, Click 'Yes'



## Product Add/Edit (Fields and Features) (Continued)

- If the revival is a success, you will be prompted, and the product will change status on the screen back to 'Normal'



### *Reviving a Product where another product exists with the same product code.*

After a successful deletion, a product code can then be re-used on the system. This is possible because the system identifies products using an internal 'Index' code rather than the 'Product Code'. Because of this it is possible to have multiple products with the same 'product code'.

**Note:** You can only have one active product (Status = 'Normal') with a given code.

Status	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier
Deleted	7	ProductG1	£0.00000	£0.00	MG1	G1a	-10	0	<input checked="" type="checkbox"/>	0
Normal	7	ProductG2	£0.50000	£1.00	MG1	G1a	0	0	<input checked="" type="checkbox"/>	0

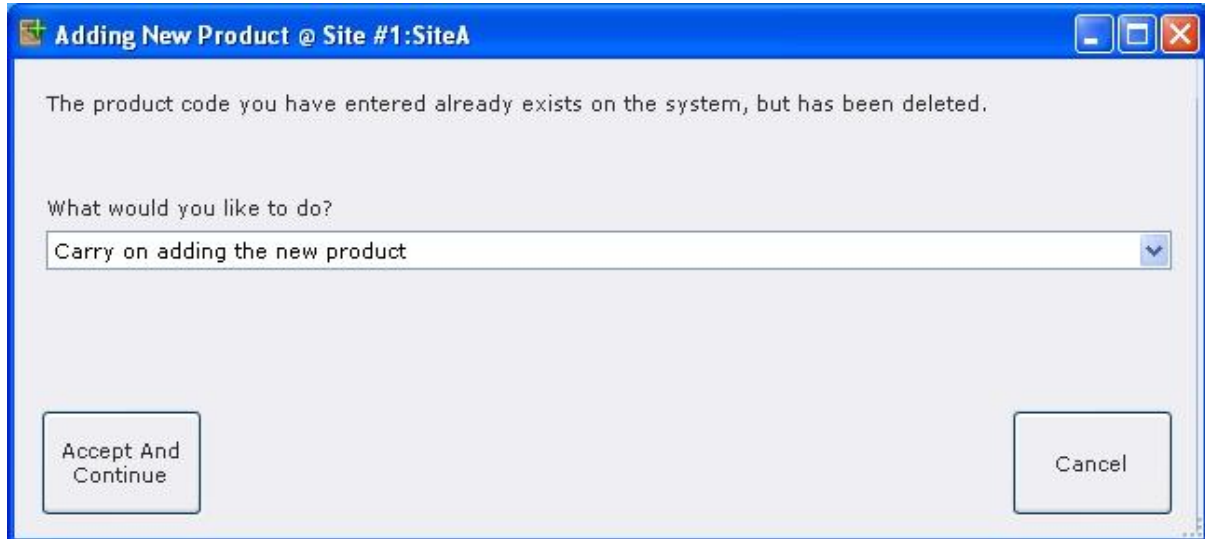
Attempting to revive a product where another product exists in 'Normal' state with the same code will result in a prompt.



## Product Add/Edit (Fields and Features) (Continued)

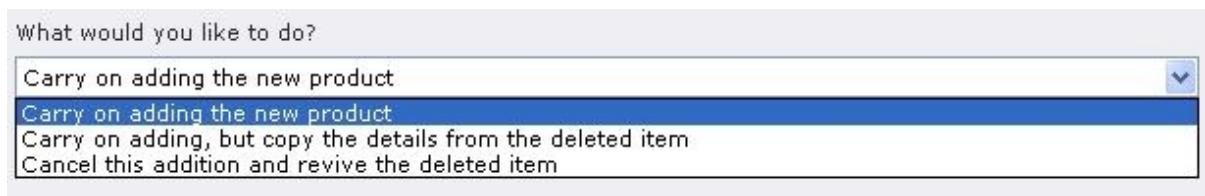
### Revival Of A Deleted Product When Adding A New Product

When you are creating a new product, the system can perform a check for any deleted products with that code. If any are found then you will be prompted, and asked how to proceed.



The following options are available:

1. **Carry on adding the new product**
2. **Carry on adding, but copy the details from the deleted item**
3. **Cancel this addition and revive the deleted Item**



## Product Add/Edit (Fields and Features) (Continued)

### Adding products to the label print Queue.

In addition to adding product directly onto a label print queue from the 'Labels Manager' applet, you can add products to a queue directly from the 'Product Maintenance' screen.

Using this method you are able to select multiple products and add them to a label queue directly, selecting the required queue from a list and also specifying the quantity of labels to be added per product. Or have the system prompt with the option to add a product to the queue at the point of saving a product as part of an 'add' or 'edit' operation. In cases where the product already exists on the selected queue, the system prompts you with options to append to, or replace the current quantities.

**Important Note:** Each product in the database has a 'Print Label' field which controls if the system is allowed to print labels for the product. Attempting to add a product to the queue, (where it's 'Print Label' flag is set 'False' will result in it not being added to the queue).

### Quantities.

When adding the products to the label queue the following quantities are available:

- **Quantity of 1** –Adds 1 label per Product
- **Quantity of X** –Will cause a prompt to be displayed allowing you to enter a quantity
- **Current Stock Quantity** –Will add 1 label for each individual unit in stock

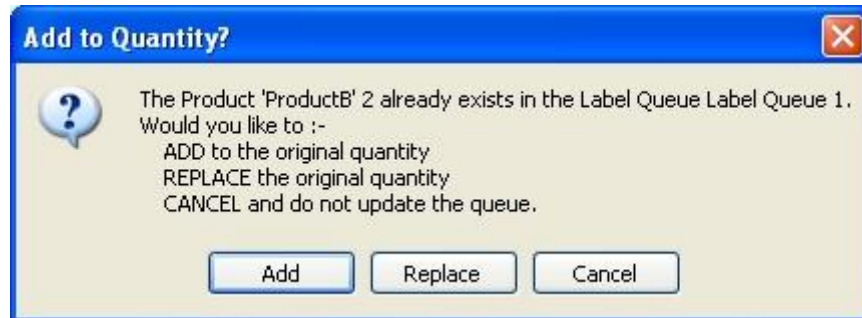
### *To add products to the label queue (From the main 'Product Maintenance' screen)*

1. Select the required products
2. Right-click on the product maintenance screen to display the context menu
3. Click 'Add to Print Queue'
4. Select the label queue you want to add to.
5. Select the Quantity to use
  - **Quantity of 1** –Adds 1 label per Product
  - **Quantity of X** –Will cause a prompt to be displayed allowing you to enter a quantity
  - **Current Stock Quantity** –Will add 1 label for each individual unit in stock
6. If the product doesn't already exist on the selected queue, the labels will be added and a prompt displayed informing you how many product have been added to the queue and also the name of the queue.

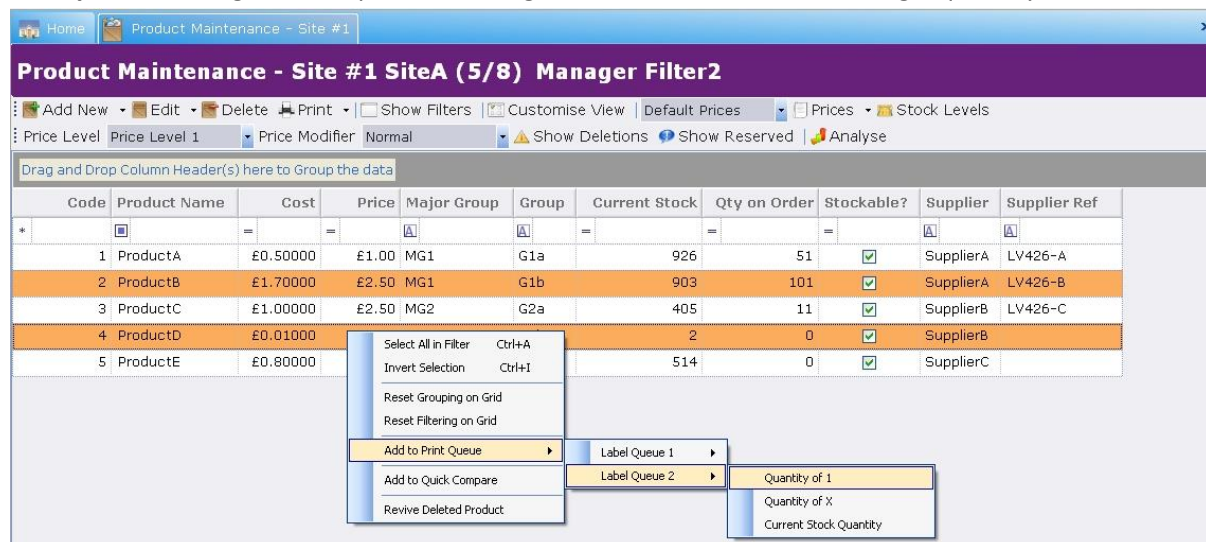


## Product Add/Edit (Fields and Features) (Continued)

7. If the product already exists on the selected queue, then system will prompt you, asking how you want to handle this.
  - **ADD** to the original quantity
  - **REPLACE** the original quantity
  - **CANCEL** and do not update the queue



**Example1:** Showing selected products being added to 'Label Queue 2' using a quantity of 1.

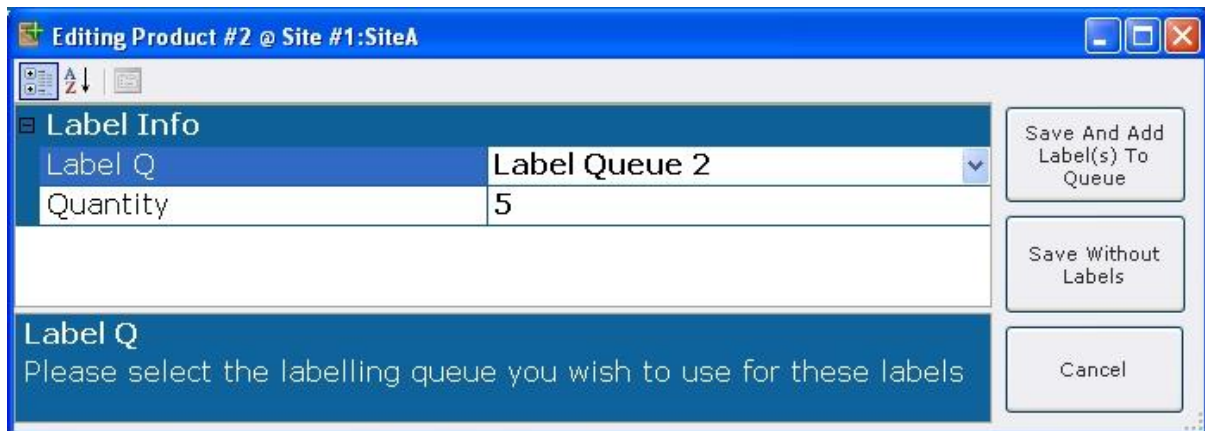


### To add products to the label queue (At the point of saving a product)

1. Add or edit a product
  2. Click 'Save'
  3. A screen should now be displayed allowing you to select which label queue to add to and enter the quantity required. **Note:** The option to display this screen is disabled by default and would require enabling for use. Go to 'Setup', then 'General Options', then go to the 'Products' section, and change the option 'Add to label queue when Saving products' to 'Yes'. Click 'Save Changes' to complete the enabling of this option.
  4. Set both the 'Label Queue' and 'Quantity'
  5. Click 'Save And Add Label(s) To Queue'
- Note:** If you wish to save the product and not add it to the label Queue select 'Save Without Labels'

## Product Add/Edit (Fields and Features) (Continued)

**Example1:** Showing the screen displayed on 'save', providing the option to add to the label queue.



The screenshot shows a software window titled "Editing Product #2 @ Site #1:SiteA". Inside, there is a section titled "Label Info" which contains a table with two rows: "Label Q" with a dropdown menu showing "Label Queue 2", and "Quantity" with the value "5". To the right of this table are three buttons: "Save And Add Label(s) To Queue", "Save Without Labels", and "Cancel". Below the table, there is a blue header "Label Q" and a text prompt: "Please select the labelling queue you wish to use for these labels".

Label Info	
Label Q	Label Queue 2
Quantity	5

Save And Add Label(s) To Queue

Save Without Labels

Cancel


**Label Q**  
Please select the labelling queue you wish to use for these labels

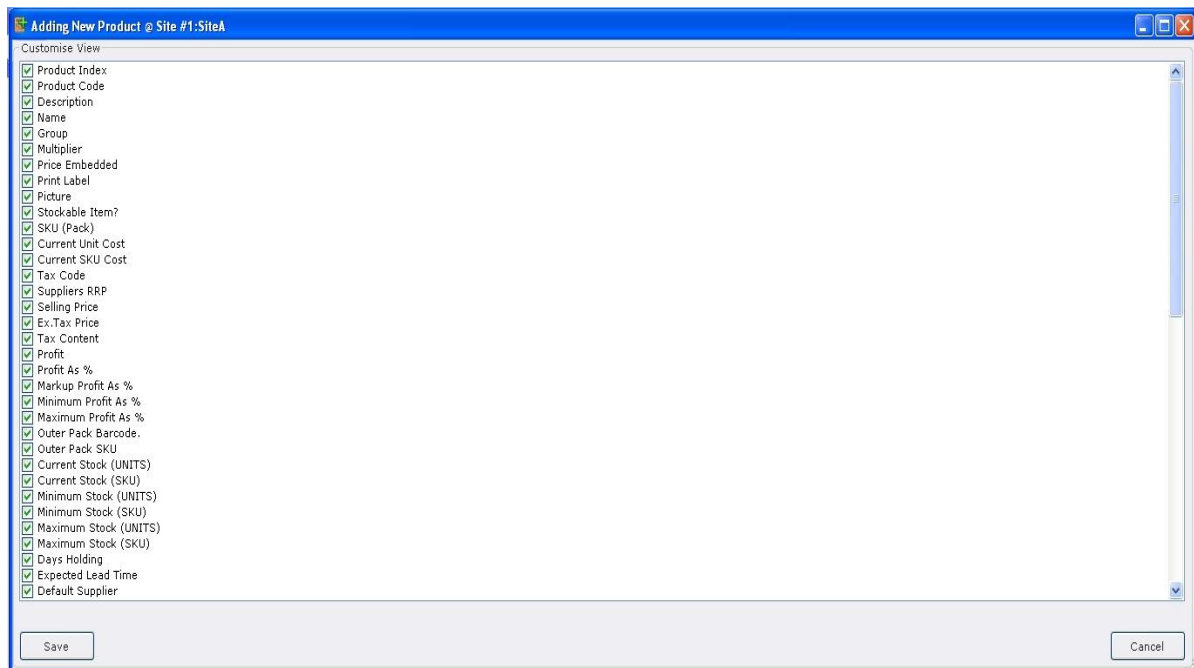
## Product Add/Edit (Fields and Features) (Continued)

### Configure View (Fields on Product add/Edit Screen)

The fields displayed on add/edit of a product can be customised, allowing you to add or remove fields to fit your requirements.

#### *To add/remove fields from this screen*

1. When adding or editing a product click the 'Configure View' Icon (  ) displayed at the top of the form.
2. From the 'Customise View' screen that will now be displayed, add/remove fields by ticking or un-ticking the checkboxes against the relevant fields.



**Note:** This configuration refers to the fields displayed on the 'General Page' not the PoS specifics fields available under 'Fidelity GPoS@Site#1' etc.

**Note:** The fields which relate to 'Linked Products' and 'Mixture Products' cannot be removed from view. This is by design to cut down on user error.

## Price Files

### Introduction to Price Files

In addition to changing the selling prices directly, Total Control Premier also has the facility to generate and maintain price files. These price files are created via the main product maintenance screen, and then managed via the 'Price Files' screen (accessed via the Price Files dropdown).

Your current prices can be copied into your price file, where they can then be manipulated, either manually (via copying prices from other fields) or automatically by applying predefined or customised formulas to the fields. For example to increase the price of all products by 10% or set a price to 'Cost Price' + 20%.

Prices can then be copied out to another price file or, the main price file, overwriting your 'Standard (Current) Prices'. This can be done manually by a user or automatically by the system which will apply the price file to your main prices and automatically initiate communication of the updated prices to account for a short term price change (for an event) or a onetime price change (for new prices).

### Types of Price File

- **Price File**  
-A 'Manual' price file, where changes made to these price files can be manually applied to the main product prices (Default Prices), as and when required. Use this option when you need to change a lot of prices, but will not be able to do all the price changes at once.
- **Special Price (Promotion)**  
-An 'Automated' price file, where a 'start date/time' and 'end date/time' are used to automatically apply the price changes to your main prices (Default Prices) and initiate communication of the updated prices to the PoS at the start and end of the promotion. Use this option for temporary price changes, for example, a Christmas promotion. The prices will automatically start at the beginning of your promotion, and also automatically revert back to their original prices when the promotion has finished.
- **Automated Price Change (Future Price Change)**  
-An 'Automated' price file, where a 'start date/time' is used to automatically apply the price changes to your main prices (Default Prices) and initiate communication of the updated prices to the PoS at the start of the price change. Use this option when you want to change a lot of prices in advance of the date/time you want these prices to take effect. For example, you want new prices to start from January, but using this method, you could start entering these prices in the previous October. You will not be required to remember to send these prices to your PoS.

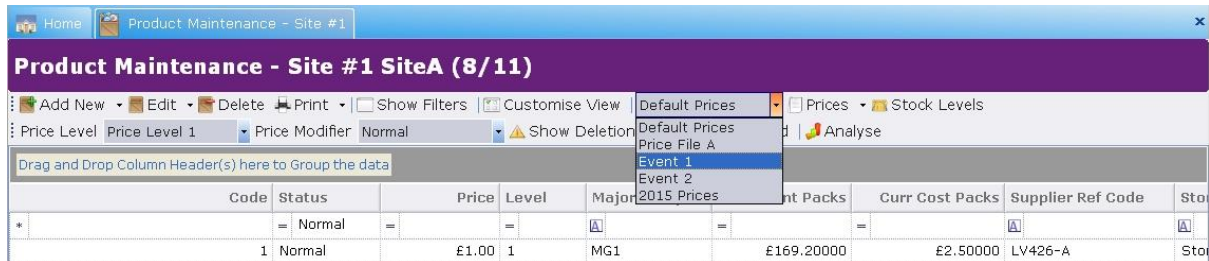


## Price Files (Continued)

### Price Files Dropdown

The 'Product Maintenance Screen' is used to view your current 'Default Prices'.

The 'Price Files Screen' is used to view a set price file in order to manage its prices, and is accessible by changing the 'Price Files' dropdown (displayed at the top of the screen) to the required price file.



### To access price files

1. Click the price file dropdown menu (Displayed at the top of the 'Product Maintenance Screen')
2. Select the price file you require.

### Creating new price files

In order to use any price files they must first be created.

#### To Create a New price List

1. Click 'New Price List' (Accessed via the dropdown arrow displayed to the right of the 'Price' button)
2. Enter a 'Description'.
3. Click 'Accept'.

**New Price Type - Price List**

Index Code: 0

Description: **Price File A**

Type of Price: Price File

Start Date:

Start Time: 00:00:00

End Date:

End Time: 00:00:00

**Description**  
Description of Price Type (i.e. Specials Name, Price File Name, etc)

Accept

Cancel

#### To Create a New Special Price (Promotion)

1. Click 'New Special Price (Promotion)' (Accessed via the dropdown arrow displayed to the right of the 'Price' button)
2. Enter a 'Description'
3. Enter a 'Start Date' and 'Start Time'
4. Enter a 'End Date' and 'End Time'
5. Click 'Accept'

## Price Files (Continued)

**New Price Type - Special Prices/Promotion**

Index Code	0
Description	Event 1
Type of Price	Promotion
Start Date	31/10/2014
Start Time	15:00:00
End Date	01/11/2014
End Time	02:00:00

**Description**  
Description of Price Type (i.e. Specials Name, Price File Name, etc)

**New Price Type - Special Prices/Promotion**

Index Code	0
Description	Event 2
Type of Price	Promotion
Start Date	25/12/2014
Start Time	15:00:00
End Date	26/09/2014
End Time	02:00:00

**Description**  
Description of Price Type (i.e. Specials Name, Price File Name, etc)

### To create a new 'Automated Price Change' (Future Price Change)

1. Click 'Automated Price Change' (Accessed via the dropdown arrow displayed to the right of the 'Price' button)
2. Enter a 'Description'.
3. Enter a 'Start Date' and 'Start Time'
4. Click 'Accept'.

**New Price Type - Automated Price Change**

Index Code	0
Description	2015 Prices
Type of Price	Future Price Change
Start Date	01/01/2015
Start Time	00:00:01
End Date	
End Time	00:00:00

**Description**  
Description of Price Type (i.e. Specials Name, Price File Name, etc)

### Modifying existing Price Files

This screen allows you to alter the description for the price file, or change the start/end dates and times.

Prices - Specials/Lists/Automated Changes				
<div> <div>+</div> Add           <div>✎</div> Edit           <div>✖</div> Delete         </div> <div>Drag and Drop Column Header(s) here to Group the data</div>				
Description	Type of Prices	Start Date	Finished	End Date
2015 Prices	Auto Price Changes	01/01/2015 00:00:01	<input type="checkbox"/>	
Price File A	Saved Price File		<input checked="" type="checkbox"/>	
Event 1	Special Prices (Promotional)	31/10/2014 15:00:00	<input type="checkbox"/>	01/11/2014 02:00:00
Event 2	Special Prices (Promotional)	25/12/2014 15:00:00	<input type="checkbox"/>	26/09/2014 02:00:00

## Price Files (Continued)

### *To Add a New Price File (Via modify form)*

1. Click 'Add'
2. Fill in the relevant details
3. Click 'Accept'

### *To Edit an Existing Price File (Via modify form)*

1. Select the price file you wish to edit
2. Click 'Edit'
3. Make the relevant changes
4. Click 'Accept'

### *To Delete an Existing Price File (Via modify form)*

1. Select the price file you wish to delete
2. Click 'Delete'
3. You will be prompted to confirm deletion, Click 'Yes'.

## Copy Prices In

Rather than starting with blank prices, this feature can be used to 'Copy in' your current (Default Prices) from the product Maintenance screen. Please note that on a large database with several thousand products, this procedure can take a while to run.

**Note:** If you wish to use prices from another price file, this can be accomplished by using that price files 'Copy Prices Out' Feature.

**Copy Products into Price List**

Select the range of products you would like to import into your price list. If you dont select a range, then all products will be copied.

☐ Product Range Selection

Product Start:

Product End:

☐ Group Selection

☐ 1 - MG1

☐ 2 - MG2

☐ 3 - Wet Sales

☐ 4 - Dry Sales

☒ Copy Current Prices (Otherwise they will be ZERO) ☒ Do not overwrite existing prices.

## Product Range and/or Group Selection

This can be used to specify which products you wish to bring in prices for, via either product code or group selection. For example, select product codes 1 – 100, or select only products that belong to a given group.

## Price Files (Continued)

Using the 'Copy Prices In' Feature without setting a Product Range or Group selection will simply bring in 'ALL Prices'.

☒ Product Range Selection

Product Start: 1 - ProductA

Product End: 5 - ProductE

☒ Group Selection

- ☒ 1 - MG1
  - ☒ 1 - G1a
  - ☐ 2 - G1b
- ☒ 2 - MG2
  - ☒ 3 - G2a
  - ☐ 4 - G2b

### Copy Current Prices (Otherwise they will be Zero)

This option dictates if you want to copy in the current (Default) price from the Database or simply set a price of £0.00 against the products.

☒ Copy Current Prices (Otherwise they will be ZERO)

- Setting this as '**True**', would result in the current (default prices) being copied in.

	Code	Product Name	Price Level 1 Normal
*	<input type="checkbox"/>		=
	1	ProductA	£1.00
	2	ProductB	£2.50
	3	ProductC	£2.50

- Setting this as '**False**' would result in Blank Prices being set against all the products.

	Code	Product Name	Price Level 1 Normal
*	<input type="checkbox"/>		=
	1	ProductA	£0.00
	2	ProductB	£0.00
	3	ProductC	£0.00

### Do Not overwrite existing prices

This option dictates if you want to copy prices in overwriting any current values, or to only copy in values where no prices are set within the price file.

☒ Do not overwrite existing prices.

## Price Files (Continued)

**Example1:** Showing the Current (Default) prices set against 3 products on the 'Product Maintenance Screen'.

Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
1	ProductA	£0.50000	£1.00	MG1	G1a	846	51	<input checked="" type="checkbox"/>	SupplierA	LV426-A
2	ProductB	£1.70000	£2.50	MG1	G1b	873	101	<input checked="" type="checkbox"/>	SupplierA	LV426-B
3	ProductC	£1.00000	£2.50	MG2	G2a	355	11	<input checked="" type="checkbox"/>	SupplierB	LV426-C

**Example2:** Showing just a single Price (£2.60) set against one of the 3 products, on the 'Price File' screen for the price file 'Event 1'.

Code	Product Name	Price Level 1 Normal	Price Level 1 Half	Price Level 1 Double	Price Level 1 Triple
1	ProductA				
2	ProductB	£2.60			
3	ProductC				

- Setting this as **'True'**, would result in the 'Current (default prices)' being copied in, for all products except 'Product Code 2' whose price will be left at £2.60

Code	Product Name	Price Level 1 Normal
1	ProductA	£1.00
2	ProductB	£2.60
3	ProductC	£2.50

- Setting this as **'False'** would result in 'Current (default prices)' being copied in, for all products including 'Product Code 2' whose price would be changed to £2.50

Code	Product Name	Price Level 1 Normal
1	ProductA	£1.00
2	ProductB	£2.50
3	ProductC	£2.50

## Price Files (Continued)

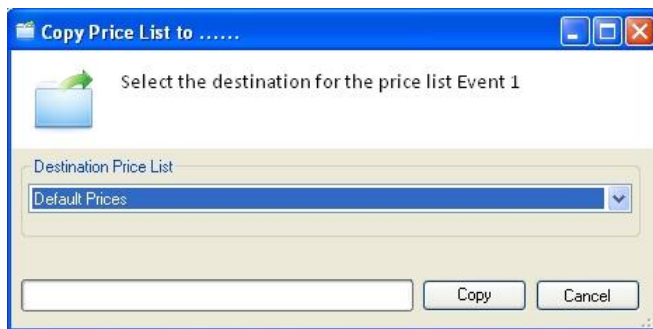
### To Copy Prices In

1. Click 'Copy Prices In'
2. Where required specify a 'Product Range' or 'Group Selection'
3. Set the option 'Copy Current Prices (Otherwise they will be ZERO)' as required.
4. Set the option 'Do not overwrite existing prices' as required
5. Click 'Copy'

After successfully completion you will be prompted.

### Copy Prices Out

**Important Note:** When selecting to copy prices out only prices which are set to a value in the Price File will be copied. So a Value of £0.00 would copy out whereas a blank value would leave the destination price as already set, and would not replace the existing value with £0.00



### To Copy Prices Out

1. Click 'Copy Prices Out'
2. Select the required 'Destination Price List', from the dropdown list.

**Note:** You can select 'Default Prices' to copy the prices from this current price file to your current (Default Prices), or copy select a specific price file to copy these prices to.



## Price Files (Continued)

### Remove Prices from Products

This function is used to remove all prices from any rows currently selected.

**Example1:** Showing the 'Price file' screen prior to clearing any prices.



Code	Product Name	Price Level 1 Normal	Price Level 1 Half	Price Level 1 Double	Price Level 1 Triple
1	ProductA	£1.00	£2.00	£3.00	£4.00
2	ProductB	£2.50			
3	ProductC	£2.50			

**Example2:** Showing the 'Price file' screen post clearing prices for Product Codes 1 and 3



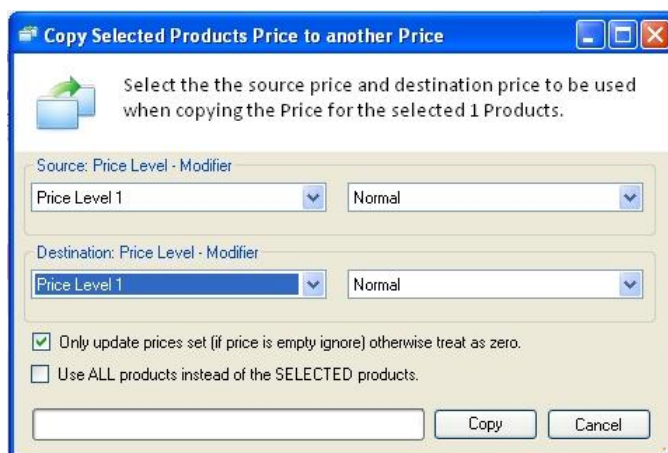
Code	Product Name	Price Level 1 Normal	Price Level 1 Half	Price Level 1 Double	Price Level 1 Triple
1	ProductA				
2	ProductB	£2.50			
3	ProductC				

### To remove Prices from products

1. Select the rows you wish to remove prices from
2. Click 'Remove Prices From Products'
3. You will be prompted to confirm the removal, click 'Yes'

### Copy Price To Price

This function can be used to copy one Price to another automatically and is used by specifying a 'Price level and modifier' to copy values from, along with a 'Price level and modifier' to copy values to. You are also able to specify how to handle source prices (where not set) as well as the ability to specify if you wish to copy this Price for all products or only those which you have selected.



**Copy Selected Products Price to another Price**

Select the the source price and destination price to be used when copying the Price for the selected 1 Products.

Source: Price Level - Modifier  
 Price Level 1 Normal

Destination: Price Level - Modifier  
 Price Level 1 Normal

☒ Only update prices: set (if price is empty ignore) otherwise treat as zero.  
☐ Use ALL products instead of the SELECTED products.

Copy Cancel

## Price Files (Continued)

### Source and Destinations Price level and Modifier

Dropdown menus here are used to set the 'Price Level' and 'Modifier' to use for both the source and destination of this copy.

**Example1:** Showing the setting required to copy the price from 'Price Level 1 Modifier Normal' to Price 1 Modifier Half.

Source: Price Level - Modifier

Price Level 1 Normal

Destination: Price Level - Modifier

Price Level 1 Half

**Example2:** Showing the price grid both before and after 'Example1' (above) when performed on Product Code 3.

Code	Price Level 1 Normal	Price Level 1 Half	Price Level 1 Double	Price Level 1 Triple	Price Level 1 Modifier - 4
=	=	=	=	=	=
1	£1.00	£2.00	£3.00	£4.00	£5.00
2	£2.50				
3	£2.50				

Code	Price Level 1 Normal	Price Level 1 Half	Price Level 1 Double	Price Level 1 Triple	Price Level 1 Modifier - 4
=	=	=	=	=	=
1	£1.00	£2.00	£3.00	£4.00	£5.00
2	£2.50				
3	£2.50	£2.50			

### Only Update prices if set (if price is empty ignore) otherwise treat as zero.

This option tells the system what to do if the source price field is empty.

- With this option set **'True'** any blank source fields will be ignored and nothing will be copied to their destination price field.
- With this option set **'False'** any blank source fields will result in a value of £0.00 being copied to the destination price field.

☒ Only update prices set (if price is empty ignore) otherwise treat as zero.



## Price Files (Continued)

### Use ALL products instead of the SELECTED Products

This setting tells the system whether to perform the copy operation on all the products or just those which you have selected.

- With this option set '**True**' the copy operation will be performed on all products in the price file.
- With this option set '**False**' the copy operation will only be performed on the products you have pre-selected

☐ Use ALL products instead of the SELECTED products.

### To Copy Price To Price

1. Select the Product(s) to use. (Unless you intend to use ALL Products)
2. Click 'Copy Price to Price'
3. Set the 'Source Price Level' and 'Source Modifier'. (Where you want to copy prices from).
4. Set the 'Destination Price Level' and 'Destination Modifier'. (Where you want to copy prices to).
5. Set the option 'Only Update prices set (if price is empty ignore) otherwise treat as zero' as required
6. Set the option 'Use ALL products instead of the SELECTED products' as required
7. Click 'Copy'

### Batch Change Prices

This feature is used to apply a change to a set price or prices, allowing you to specify which price field to effect, the update method and value to be used, and any rounding to be applied to the field after the calculation has taken place. Additionally it can be used to enter custom formulas built up of set 'Formula Variables' and 'Expressions', which can then be applied to a field, to allow for more complex tailor made calculations.

**Batch change prices**

Batch change prices for selected 0 products or all products.

Destination: Price Level - Modifier  
 Price Level 1 Normal

Round Method  
 Select the rounding method to apply  
 No Rounding

Update Method  
 Select the update method to apply  
 Add a Set Value to the Price  
 Enter the value to apply  
 £0.00

☐ Use ALL products instead of the SELECTED products.

Go Cancel

## Price Files (Continued)

### Destination: Price Level – Modifier

Dropdown menus here are used to set the 'Price Level' and 'Modifier' for the batch change to be performed on.

### Round Method

This setting determines what rounding (if any) should be applied to the value

- **No Rounding**
- **Round Up to 0p**
- **Round Up to 5p**
- **Round Up to 9p**
- **Round Down to 0p**
- **Round Down to 5p**
- **Round Up to 9p**

### Update Method

There are two fields here which are used in combination to configure that change to apply.

The Dropdown menu marked 'Select an Update method to apply' is used to set the method you wish to use for the calculation.

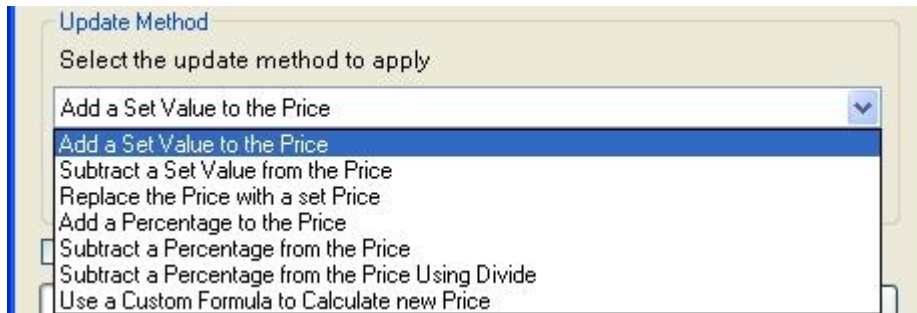
The following methods are available:

- **Add a Set Value to the Price**
- **Subtract a Set Value from the Price**
- **Replace the Price with a set Price**
- **Add a Percentage to the Price**
- **Subtract a Percentage from the Price**
- **Subtract a Percentage from the Price Using Divide.**
- **Use a Custom Formula to Calculate new Price**

## Price Files (Continued)

The field marked 'Enter the value to apply' is then used to specify the value to be used with this update method.

For example you can set the method to 'Add a Set Value to the Price' Or 'Subtract a Percentage from the Price' and then use the box marked 'Enter the value to apply' to enter a the Value (eg £0.50) or Percentage (10%) that you want the system to use with this method.



The screenshot shows a dropdown menu titled 'Update Method' with the instruction 'Select the update method to apply'. The menu is open, displaying several options: 'Add a Set Value to the Price' (highlighted), 'Subtract a Set Value from the Price', 'Replace the Price with a set Price', 'Add a Percentage to the Price', 'Subtract a Percentage from the Price', 'Subtract a Percentage from the Price Using Divide', and 'Use a Custom Formula to Calculate new Price'.

**Example1:** Showing the 'Enter Value' field when the update type used is 'Add a Set Value to the Price', note that the value entered here will be a monetary value.



The screenshot shows the 'Update Method' form with 'Add a Set Value to the Price' selected in the dropdown. Below the dropdown is a text input field labeled 'Enter the value to apply' containing the value '£0.50'.

**Example2:** Showing the 'Enter Value' field when the update type used is 'Add a Percentage to the Price', note that the value entered here will be a percentage value.



The screenshot shows the 'Update Method' form with 'Add a Percentage to the Price' selected in the dropdown. Below the dropdown is a text input field labeled 'Enter the value to apply' containing the value '10%'.

### Batch Change Prices (via Custom Formula)

Additional to the update methods that deal specifically with an inputted value or percentage, the update method can be set to "Use a Custom Formula to calculate new Price"

Selecting this will change the 'Enter Value' field to an 'Enter Custom Formula' input box, as well as providing a list of available 'Formula Variables' and 'Expressions' that can be used to build up a formula to be applied.

## Price Files (Continued)

### Available Formula Variables are:

- {0} = Price
- {1} = Tax Rate Percent (i.e. 20%)
- {2} = Cost Price UNIT
- {3} = Cost Price SKU
- {4} = Profit Margin (i.e. 20%)
- {5} = RRP

### Available Expressions are:

- + Add
- - Subtract
- \* Multiply
- / Divide

**Example3:** Showing the 'Enter Custom Formula' field when the update type used is 'Use a Custom Formula to Calculate new Price', note that the value entered here will be a Formula. This formula would be created using the 'Variables' and 'Expressions' listed.

An example would be: '{2}\*1.30', which would set the Price to be 'Cost + 30%'

**Update Method**

Select the update method to apply

Use a Custom Formula to Calculate new Price

Enter custom formula

Formula Variables:  
{0} = Price, {1} = Tax Rate Percent (ie. 20%), {2} = Cost Price UNIT, {3} = Cost Price SKU, {4} = Profit Margin (ie. 20%), {5} = RRP

Expressions:  
+ = Add, - = Subtract, \* = Multiply, / = Divide

Example:  
{0}/(1+({1}/100)) = Would Remove Tax Content  
{2}\*1.30 = Would Set Price as Cost + 30%

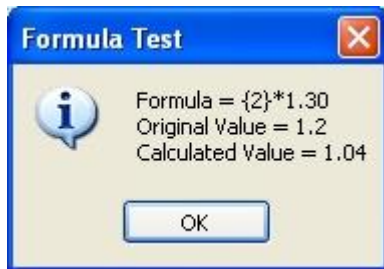
Select Product to Test

Test Formula

## Price Files (Continued)

Prior to applying your formula you are able to select a Product and use the 'Test Formula' button.

This will result in you being prompted with both the 'Original Value' and the 'Calculated Value' that would result from the formula being applied to the product.



### Use ALL products instead of the SELECTED products

This setting tells the system whether to perform the batch change operation on all the products or just those which you have selected.

- With this option set '**True**' the batch change operation will be performed on all products in the price file.
- With this option set '**False**' the batch change operation will only be performed on the products you have pre-selected

☐ Use ALL products instead of the SELECTED products.

### To Batch Change Prices

1. Select the products you require (unless you are using all products)
2. Click 'Batch Change'
3. Set the 'Destination Price Level' and 'Destination Modifier'. (Which field you want to update)
4. Set the 'Round Method' for the calculation to use.
5. Set the 'Update Method'
6. Enter the 'Value to apply' or the 'Custom Formula' to use (Dependent on the 'Update Method' selected)
7. Set the option 'Use ALL products instead of the SELECTED products' as required
8. Click 'Go'

## Price Files (Continued)

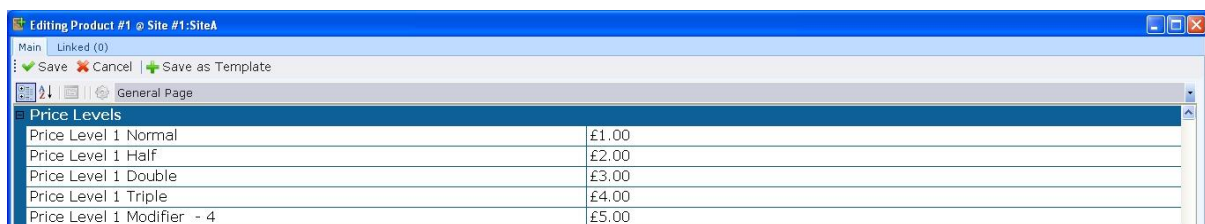
### The Price Files Tab on Product Add/Edit

When viewing a product in Add/Edit mode you are able to access the details of any prices files which relate to the product.

Allowing you to see at a glance:

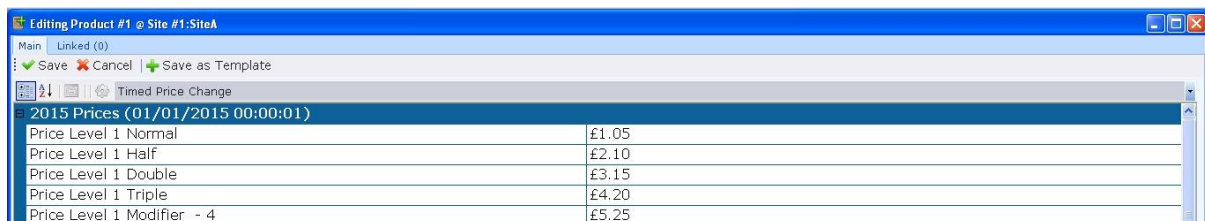
1. Which price files affect a product
2. What effect they will have
3. What time and date the effect will take place.

**Example1:** Showing the prices at Level 1, Under 'General Page' – These are your current (default) Prices



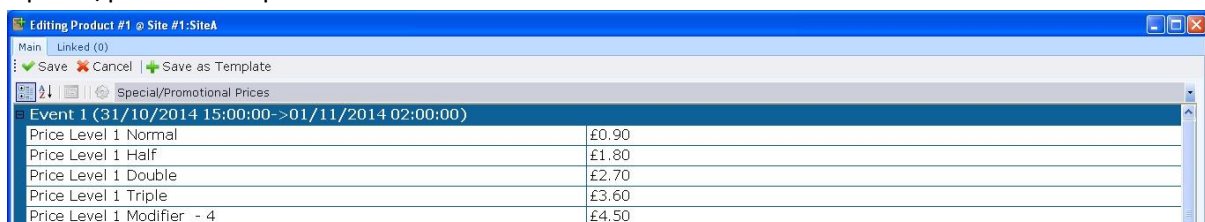
Price Levels	
Price Level 1 Normal	£1.00
Price Level 1 Half	£2.00
Price Level 1 Double	£3.00
Price Level 1 Triple	£4.00
Price Level 1 Modifier - 4	£5.00

**Example2:** Showing the Prices at Level 1, for an 'automated price change' file called 'Timed Price Change'.



2015 Prices (01/01/2015 00:00:01)	
Price Level 1 Normal	£1.05
Price Level 1 Half	£2.10
Price Level 1 Double	£3.15
Price Level 1 Triple	£4.20
Price Level 1 Modifier - 4	£5.25

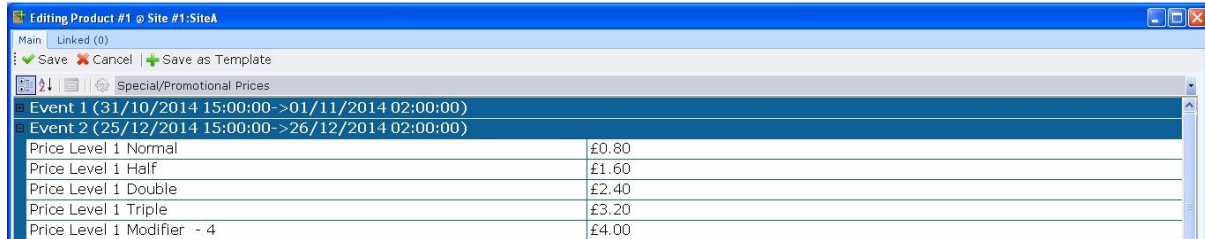
**Example3:** Showing the Prices at Level 1, for a 'special price (promotion)' file called 'special/promotional price'.



Event 1 (31/10/2014 15:00:00->01/11/2014 02:00:00)	
Price Level 1 Normal	£0.90
Price Level 1 Half	£1.80
Price Level 1 Double	£2.70
Price Level 1 Triple	£3.60
Price Level 1 Modifier - 4	£4.50

## Price Files (Continued)

**Example4:** Showing the Prices at Level 1, for two 'special price (promotion)' files called 'Event 1' and 'Event 2'.



Special/Promotional Prices	
Event 1 (31/10/2014 15:00:00->01/11/2014 02:00:00)	
Event 2 (25/12/2014 15:00:00->26/12/2014 02:00:00)	
Price Level 1 Normal	£0.80
Price Level 1 Half	£1.60
Price Level 1 Double	£2.40
Price Level 1 Triple	£3.20
Price Level 1 Modifier - 4	£4.00

**Note:** These screen will only show summaries of 'Automated Price files', including: 'Automated (Future) Price Change' and 'Special Price (Promotions)' type price files. 'Manual Price files' which are not auto implemented by the system do not show here.

### To View the Price File Summary Information (Whilst adding/editing a Product)

1. When adding or editing a Product
2. Select the dropdown menu displayed at the top of the screen and select either:
  - Timed Price Change – to view your 'Automated (Future) Price Change' Price Files
  - Special/Promotional Prices - to view your Special Price (Promotions) Price Files



General Page		
Description	Fidelity GPOS@Site#1	
Name	Timed Price Change	
Group	Special/Promotional Prices	

## Price Files (Continued)

### Printing/Exporting of Reports and Sales Analysis


There are 4 ways to print/export information from the product maintenance grid:-

1. **Print Using Grid**
2. **Print Report**
3. **Print To Microsoft Excel (Export)**
4. **Product Analysis**

#### Print Using Grid

The 'Print using Grid' feature allows you to produce a printed report that matches the current grid layout.

#### To Print Grid

1. Use Customise View feature to add or remove fields until only the fields you want in the export are on the layout.
2. Click 'Using Grid' (Accessed via the dropdown arrow displayed to the right of the 'Print' button)
3. A 'Print Preview' screen will be displayed showing what the grid will print like.
4. You can then select to print the file by clicking the print icon ().

**Note:** The file will print using your default printer. If a default printer is not setup on the system then Total Control Premier will offer to save the file as an .XPS file instead.

**Example1:** Showing the Product grid (in print preview), when 'print using grid' has been used.

Product Information - Manager Filter2

	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
1		ProductA	£0.50000	£1.00	MG1	G1a	926	51	<input checked="" type="checkbox"/>	SupplierA	LV426-A
2		ProductB	£1.70000	£2.50	MG1	G1b	903	101	<input checked="" type="checkbox"/>	SupplierA	LV426-B
3		ProductC	£1.00000	£2.50	MG2	G2a	405	11	<input checked="" type="checkbox"/>	SupplierB	LV426-C
4		ProductD	£0.01000	£0.01	MG2	G2b	2	0	<input checked="" type="checkbox"/>	SupplierB	
5		ProductE	£0.80000	£1.20	MG1	G1a	514	0	<input checked="" type="checkbox"/>	SupplierC	

#### Print Report

The Product Reports function, allows you to select from a few pre-defined reports (listed below) and provided multiple filtering and sorting options to allow you to better tailor the output to your needs. The report can then be printed direct to your default printer or displayed to screen. If displayed to screen you then have the option to print the report



## Price Files (Continued)

### *The following Reports are available*

1. **Product Report (excluding User Fields)**  
-A basic product report NOT including any associated user fields.
2. **Product Report (including User Fields)**  
-A basic product report including any associated user fields.
3. **Product Price List**  
-A simple product price list displaying the default selling price
4. **Product Updates (based on Last Modified Date)**  
-A list of products which have been edited on or since a user defined date.
5. **Product Price List (All Prices)**  
-A simple product price list displaying the all prices set

**Note:** These 'reports' are simple product lists, for sales and profit reports use the main reporting applet. ('Reporting' > 'Reporting')

### *Available filters are:*

1. **Product Code Range** (eg codes 1 – 100)
2. **Supplier** (e.g. only products with default supplier set as 'SupplierA')
3. **Show Products** (Show all products/Show Products with zero cost price only/Products without a zero cost price)
4. **Show Products with Status** (Normal/Deleted & Pending Deletion/Reserved)
5. **User Field Filtering** (e.g. only Products where user field1 = X)
6. **Group Filtering** (Checkbox selection allows you to specify which Main groups and/or Groups you wish to include)
7. **Date Modified** (For use on 'Product Updates' Report Only)

### *Sorting Methods available:*

1. **Product Number**
2. **Description**

### *Output Methods are:*

1. **Display** (Show on screen)
2. **Print** (Prints to default printer)



## Price Files (Continued)

### To Display Or Print a Product Report

1. Click 'Report' (Accessed via the dropdown arrow displayed to the right of the 'Print' Button)
2. The Product Reporting screen will now be displayed.
3. Select the report you wish to print from the 'Select Report' dropdown menu.
4. Enter any filtering you require.

**Note:** The 'Clear Filters' button can be used to reset these filters to their default values.

5. Select how you wish the report to be sorted. (Product Number or Description)
6. Click 'Display' or 'Print' to display the report to screen, or print the report directly to your default printer.
7. If you have selected to display the report to screen, you then have the following options:

- Print the report via the () button
- Export the report via the () button  
(Formats .rpt/.pdf/.csv/.xls/.xlsx/.doc/.rtf/.xml)

## Price Files (Continued)

### Example1: Product Report (excluding User Fields)

27/08/2014

Product List (excluding user fields)

Page 1 of 1

PLU Range from 1 to 11

MG1

G1a

PLU Code	Description	SKU Name	Cost	Avg. Tax%	Profit	%	Price	RRP
1	ProductA	5 Pack	£0.50	£0.63 0.00	£0.50	50.00	£1.00	£1.00
5	ProductE	10 Pack	£0.80	£0.51 0.00	£0.40	33.33	£1.20	£1.30

G1b

PLU Code	Description	SKU Name	Cost	Avg. Tax%	Profit	%	Price	RRP
2	ProductB	10 Pack	£1.70	£1.01 20.00	£0.38	18.40	£2.50	£3.00

MG2

G2a

PLU Code	Description	SKU Name	Cost	Avg. Tax%	Profit	%	Price	RRP
3	ProductC	Single units	£1.00	£1.25 20.00	£1.08	52.00	£2.50	£2.40

G2b

PLU Code	Description	SKU Name	Cost	Avg. Tax%	Profit	%	Price	RRP
4	ProductD	Single units	£0.01	£0.01 0.00	£0.00	0.00	£0.01	£0.00

### Example2: Product Report (including User Fields)

27/08/2014

Product List Report (Including User Fields)

Page 1 of 1

PLU Range from 1 to 11

MG1

G1a

PLU Code	Description	SKU Name	Cost	Avg. Tax%		Profit	%	Price	RRP
1	ProductA	5 Pack	£0.50	£0.63	0.00	£0.50	50.00	£1.00	£1.00
	Supplier Ref Code	LV426-A							
	Storage Area Code	Storage Area 1							
5	ProductE	10 Pack	£0.80	£0.51	0.00	£0.40	33.33	£1.20	£1.30
	Supplier Ref Code								
	Storage Area Code	Storage Area 3							

G1b

PLU Code	Description	SKU Name	Cost	Avg. Tax%		Profit	%	Price	RRP
2	ProductB	10 Pack	£1.70	£1.01	20.00	£0.38	18.40	£2.50	£3.00
	Supplier Ref Code	LV426-B							
	Storage Area Code	Storage Area 1							

MG2

G2a

PLU Code	Description	SKU Name	Cost	Avg. Tax%		Profit	%	Price	RRP
3	ProductC	Single units	£1.00	£1.25	20.00	£1.08	52.00	£2.50	£2.40
	Supplier Ref Code	LV426-C							
	Storage Area Code	Storage Area 2							

G2b

PLU Code	Description	SKU Name	Cost	Avg. Tax%		Profit	%	Price	RRP
4	ProductD	Single units	£0.01	£0.01	0.00	£0.00	0.00	£0.01	£0.00
	Supplier Ref Code								
	Storage Area Code	Storage Area 3							

## Price Files (Continued)

**Example3: Product Price List**

27/08/2014

Product Price List

Page 1 of 1

PLU Range from 1 to 11

MG1

G1a

PLU Code	Description	Tax%	Price	RRP	Discount
1	ProductA	0.00	£1.00	£1.00	£0.00
5	ProductE	0.00	£1.20	£1.30	£0.10

G1b

PLU Code	Description	Tax%	Price	RRP	Discount
2	ProductB	20.00	£2.50	£3.00	£0.50

MG2

G2a

PLU Code	Description	Tax%	Price	RRP	Discount
3	ProductC	20.00	£2.50	£2.40	-£0.10

G2b

PLU Code	Description	Tax%	Price	RRP	Discount
4	ProductD	0.00	£0.01	£0.00	£0.00

**Example4: Product Updates (based on Last Modified Date)**

27/08/2014

Product Update Report

Page 1 of 1

PLU Range from 1 to 11

MG1

G1a

PLU Code	Description	SKU Name	Cost	Avg. Tax%	Profit	%	Price	RRP
1	ProductA	5Pack	£0.50	£0.63 0.00	£0.50	50.00	£1.00	£1.00

MG2

G2a

PLU Code	Description	SKU Name	Cost	Avg. Tax%	Profit	%	Price	RRP
3	ProductC	Single units	£1.00	£1.25 20.00	£1.08	52.00	£2.50	£2.40

**Example5: Product Price List (All Prices)**

27/08/2014			Product Price List																Page 1 of 1						
			PLU Range from 1 to 11																						
			Price Level 1					Price Level 2					Price Level 3					Price Level 4							
			Normal	Half	Double	Triple	Modifier	Normal	Half	Double	Triple	Modifier	Normal	Half	Double	Triple	Modifier	Normal	Half	Double	Triple	Modifier			
MG1	67	G2	1	ProductA	£1.00	£2.00	£3.00	£4.00	£5.00	£6.00	£7.00	£8.00	£9.00	£10.00	£11.00	£12.00	£13.00	£14.00	£15.00	£16.00	£17.00	£18.00	£19.00	£20.00	
			5	ProductE	£1.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
			2	ProductB	£2.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
			3	ProductC	£2.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
MG2	67	G2	4	ProductD	£0.01	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	

## Price Files (Continued)

### Print to Microsoft Excel (Export)

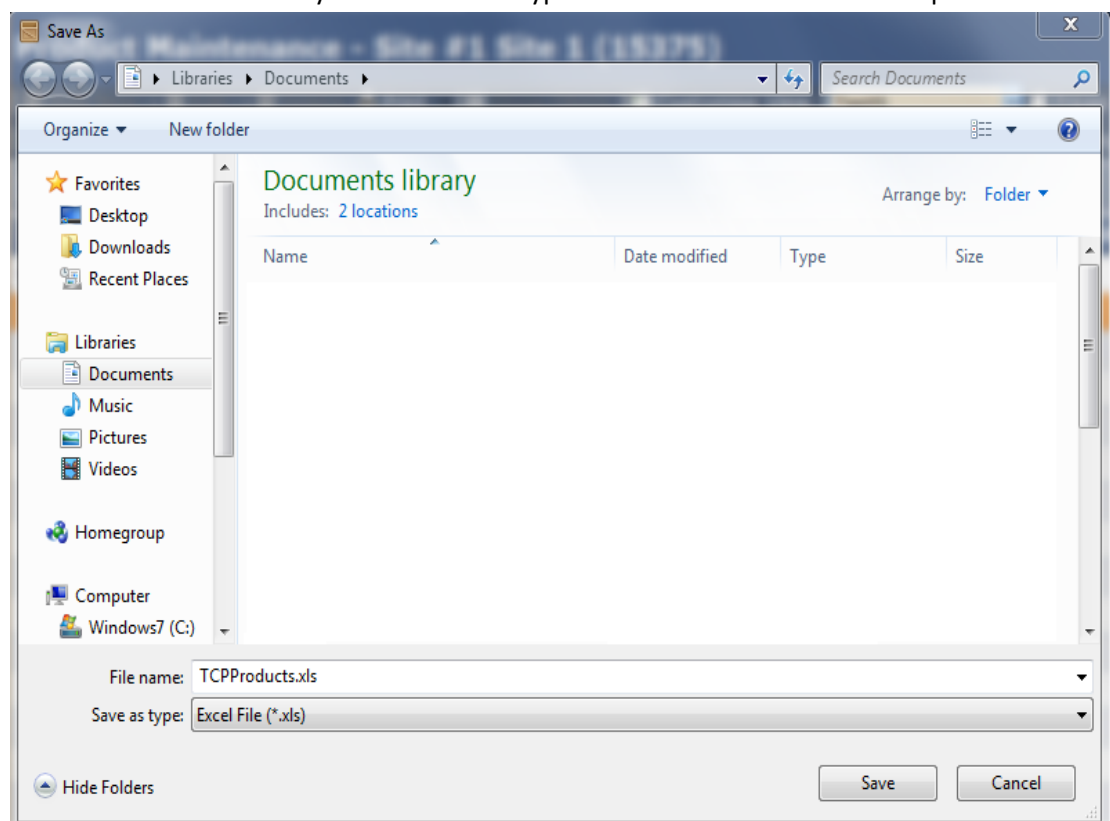
All the data displayed on the product maintenance screen, can be exported to a Microsoft Excel file. Allowing you to open and view the information in Microsoft Excel or another similar spreadsheet package. When exporting, all the fields (columns) in the grid will be exported. You can specify which fields you want in the export by adding and removing fields from this screen using the 'Customise view' feature (see page 40).

### To Export the Data

1. Click 'To Microsoft Excel' (Accessed via the dropdown arrow displayed to the right of the 'Print' Button)
2. Enter the location and file name you wish to use when saving the export file.

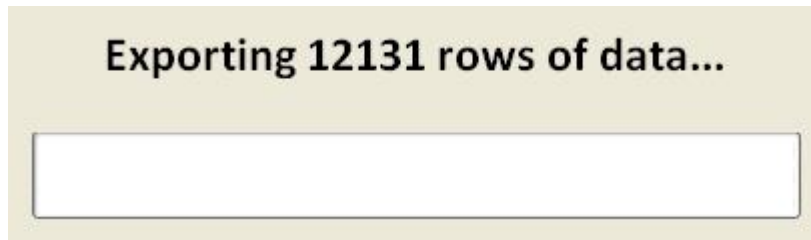
**Note:** By default the system will attempt to save this file to the 'Documents' library (My Documents on older versions of Microsoft Windows), using the file name 'TCPProducts' but both these can be altered to best suit your needs.

**Note:** By default the system will use the file extension .xls meaning that Microsoft Excel will recognise it as a file which it can open. After opening the file in Excel you would then be able to save the file as a variety of different file types such as .csv or PDF etc as required.

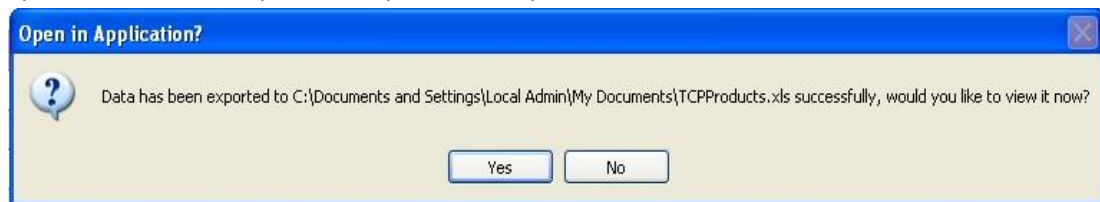


3. Click save
4. A Progress box will now show informing you how many rows of data are being exported.

## Price Files (Continued)

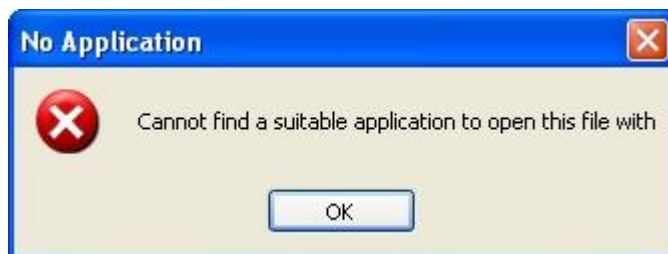


- After the export has completed a prompt will be displayed informing you that the process was successful and the location of the export file. Whilst you can open this file manually, the system will offer to open the export file for you.



- If the you selects 'YES' the system will attempt to find a suitable application such as Microsoft Excel, with which to open the exported spread sheet file.
- If no suitable application is found on the local machine, then you will be prompted informing you of this.

In this situation you can either have a suitable program installed on their machine with which to view the file, or move the file to another machine which has the application installed.



### Example1: Showing the product grid

Product Maintenance - Site #1 Site A (5/8) Default						
Add New ▾ Edit ▾ Delete ▾ Print ▾ Show Filters ▾ Show Customise View ▾ Default Prices ▾ Prices ▾ Stock Levels ▾ Price Level ▾ Price Modifier ▾ Show Deletions ▾ Show Reserved ▾ Analyse ▾ Save Open Windows						
Drag and Drop Column Header(s) here to Group the data						
Code	Product Name	Cost	%	Tax	Major Group	Group
*		=	=	A	A	A
1	Product A	£0.50	50.00	No Tax Defined	Wet Sales	Draught
2	Product B	£0.50	50.00	No Tax Defined	Wet Sales	Draught
3	Product C	£0.50	50.00	No Tax Defined	Wet Sales	Bottles
4	Product D	£0.25	80.00	STD VAT	Wet Sales	Bottles
5	Product E	£0.65	48.00	STD VAT	Wet Sales	Bottles

## Price Files (Continued)

**Example2:** Showing how this would look after being exported and the file opened in Microsoft Excel

TCPPProducts - Excel

	A	B	C	D	E	F	G
1	Code	Product Name	Cost	% Tax		Major Group	Group
2	1	Product A	0.5	50	No Tax Defined	Wet Sales	Draught
3	2	Product B	0.5	50	No Tax Defined	Wet Sales	Draught
4	3	Product C	0.5	50	No Tax Defined	Wet Sales	Bottles
5	4	Product D	0.25	80	STD VAT	Wet Sales	Bottles
6	5	Product E	0.65	48	STD VAT	Wet Sales	Bottles



## Analyse / Quick Compare

In addition to sales reports ran from the 'Reporting' applet, the product maintenance screen has the ability to generate graphs of product sales, to allow for a quick comparison. This feature is accessible via the 'Analyse' button.

To use this feature, select the 'Products' to be added to the 'Analyse/Quick Compare' and then set a 'Date Range'.

You are then able to view graphs based upon sales information for this date range, with the additional function of being able to also specify a 'Compare Date Range', and then view sales data for both these ranges on the same graph for comparison.

Various options can be adjusted to best suit your needs, and 33 different types of graph are available.

**Note:** A similar function also exists on the 'Grouping' screen

### Adding Products to Analyse/Quick Compare

Products can be added to the list individually, or collectively by selecting several products at once.

#### To add Products to Analyse/Quick Compare

1. Select the Products Required
2. Right-click on the screen to display the context menu
3. Select 'Add to Quick Compare'

Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Stockable?	Supplier	Supplier Ref
*		=	=	A	A	=	=	=	A	A
1	ProductA	£0.50000	£1.00	MG1	G1a	926	51	<input checked="" type="checkbox"/>	SupplierA	LV426-A
2	ProductB	£1.70000	£2.50	MG1	G1b	903	101	<input checked="" type="checkbox"/>	SupplierA	LV426-B
3	ProductC	£1.00000	£2.50	MG2	G2a	405	11	<input checked="" type="checkbox"/>	SupplierB	LV426-C
4	ProductD	£0.01000	£0.01	MG2		2	0	<input checked="" type="checkbox"/>	SupplierB	
5	ProductE	£0.80000	£1.20	MG1		4	0	<input checked="" type="checkbox"/>	SupplierC	

Select All in Filter Ctrl+A  
 Invert Selection Ctrl+I  
 Reset Grouping on Grid  
 Reset Filtering on Grid  
 Add to Print Queue  
 Add to Quick Compare  
 Revive Deleted Product

Add the selected item(s) to the Quick Compare list for comparison analysis

### Removing Products from Analyse/Quick Compare

Products can be removed from the Analyse/Quick Compare list individually, or the entire list cleared at once.



## Analyse / Quick Compare (Continued)

### To Remove Products from Analyse/Quick Compare

1. If the 'Analyse/Quick Compare' bar is not in view click the 'Analyse' button to bring it into view
2. Right-click the product you wish to remove
3. Select 'Remove Product' or 'Clear all products'

**Product Maintenance - Site #1 SiteA (5/8) Manager Filter2**

Add New Edit Delete Print Show Filters Customise View Default Prices Prices Stock Levels  
 Price Level Price Level 1 Price Modifier Normal Show Deletions Show Reserved **Analyse**

Drag and Drop Column Header(s) here to Group the data

	Code	Product Name	Cost	Price	Major Group	Group	Current Stock	Qty on Order	Sto
*			=	=	A	A	=	=	=
1	ProductA	£0.50000	£1.00	MG1	G1a	926	51		
2	ProductB	£1.70000	£2.50	MG1	G1b	903	101		
3	ProductC	£1.00000	£2.50	MG2	G2a	405	11		
4	ProductD	£0.01000	£0.01	MG2	G2b	2	0		
5	ProductE	£0.80000	£1.20	MG1	G1a	514	0		

**Quick Compare**

Create Graph

Date Compare

Date Range

Start 01/Aug/13 00:00:00

End 31/Aug/13 23:59:59

1 - ProductA  
2 - ProductB  
3 - ProductC

Remove Product  
Clear all products

### Setting a 'Date Range' and or 'Compare Date Range'

In order to use the 'Analysis/Quick Compare' feature, a 'date range' must be entered, together with a 'compare date range' if you are using the comparison.

### To Set a 'Date Range' and or 'Compare Date Range'

1. If the 'Analyse/Quick Compare' bar is not in view click the 'Analyse' button to bring it into view
2. Use the date selectors on the 'Date' tab to select a start and end date for the analyse
3. When a 'Comparison Date Range' is required, access the 'Compare' tab, tick the box marked "Compare Date Range", and enter the start and end date for the comparison in the same manner.

## Analyse / Quick Compare (Continued)

**Quick Compare**

Create Graph

Date Compare

Date Range

Start 01/Aug/13 00:00:00

End 31/Aug/13 23:59:59

1 - ProductA  
2 - ProductB  
3 - ProductC

**Quick Compare**

Create Graph

Date Compare

☒ Compare Date Range

Start 01/Aug/14 00:00:00

End 31/Aug/14 23:59:59

1 - ProductA  
2 - ProductB  
3 - ProductC

### To View Products Analyse/Quick Compare Graphs

1. If the 'Analyse/Quick Compare' bar is not in view click the 'Analyse' button to bring it into view
2. With Product(s) added and date range or ranges set, click the 'Create Graph' button

### To change graph type


1. When viewing a Product Analyse graph click the 'Options' button.
2. Click on the 'Appearance' tab.
3. Click the drop down list in the 'Graph Type' section to select a graph type.

**Note:** Options here can be used to perform several functions including:

- Changing the date ranges used.
- Changing the Sites, Locations, and POS upon which the sale information is based.
- Changing if and where on the screen the 'Legend' will display
- Changing the Graph Type

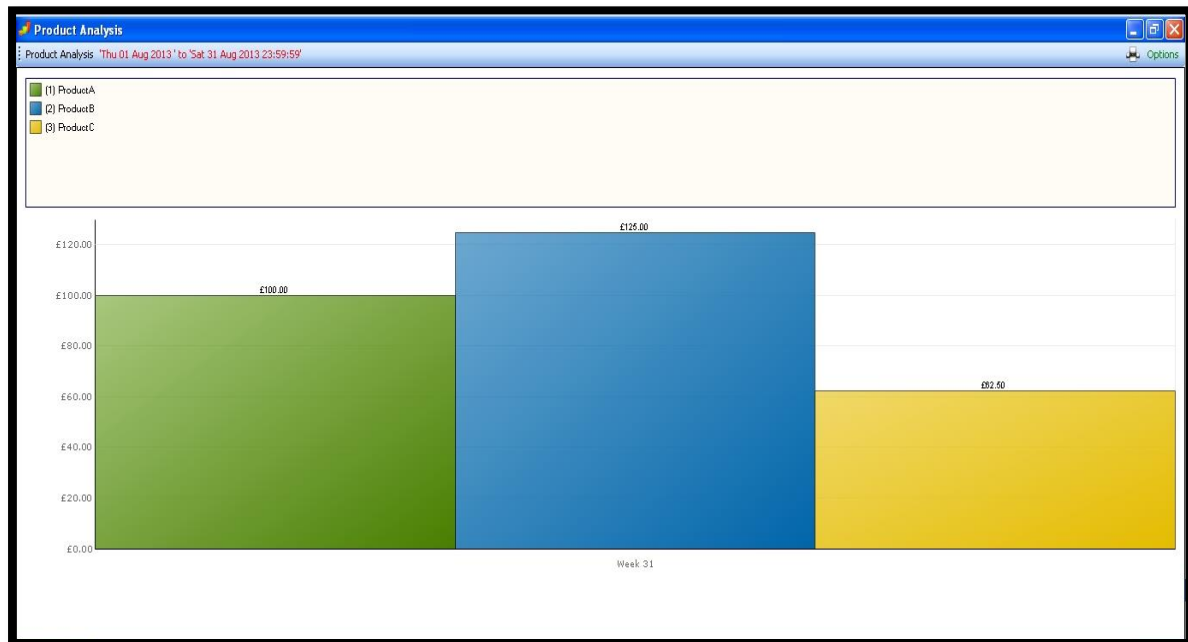
## Analyse / Quick Compare (Continued)

### To print a Graph

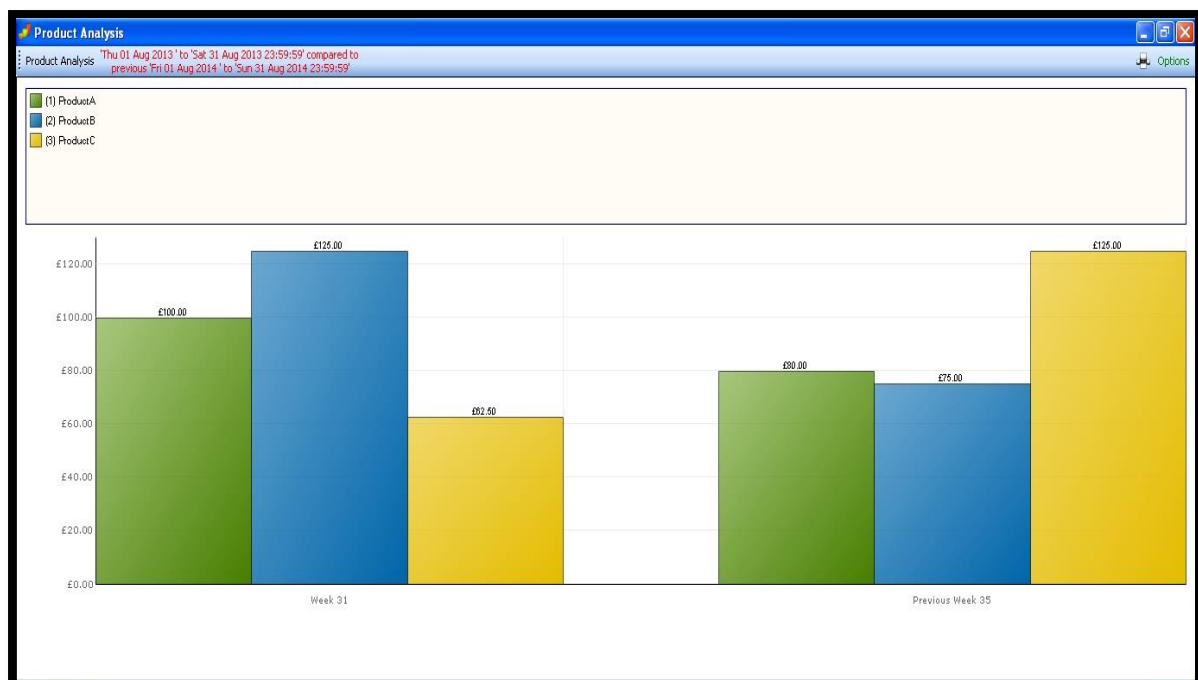
1. With the graph in view, Click the printer icon () , displayed in the top right of the screen.

The system will then attempt to print the graph using your default printer.

**Example1:** Showing a Products Analyse of 3 Products for August 2013 as a 'Column Chart' graph

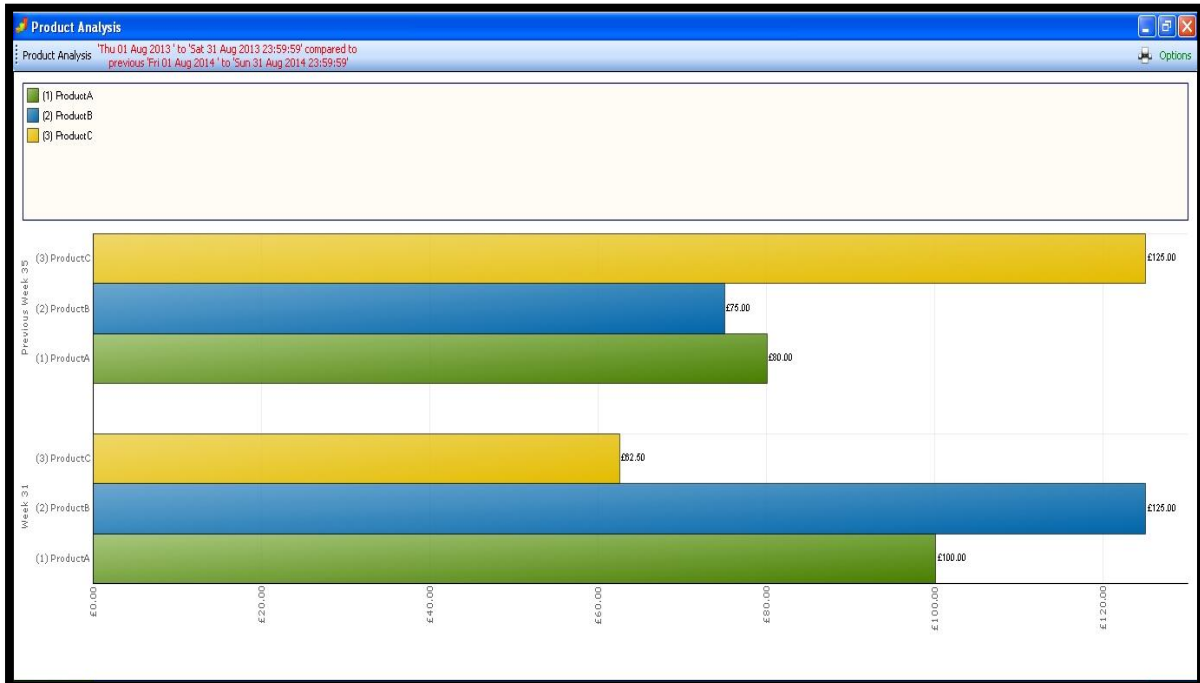


**Example2:** Showing a Product Analyse of 3 Products for August 2013 compared to August 2014 as a 'Column Chart' graph

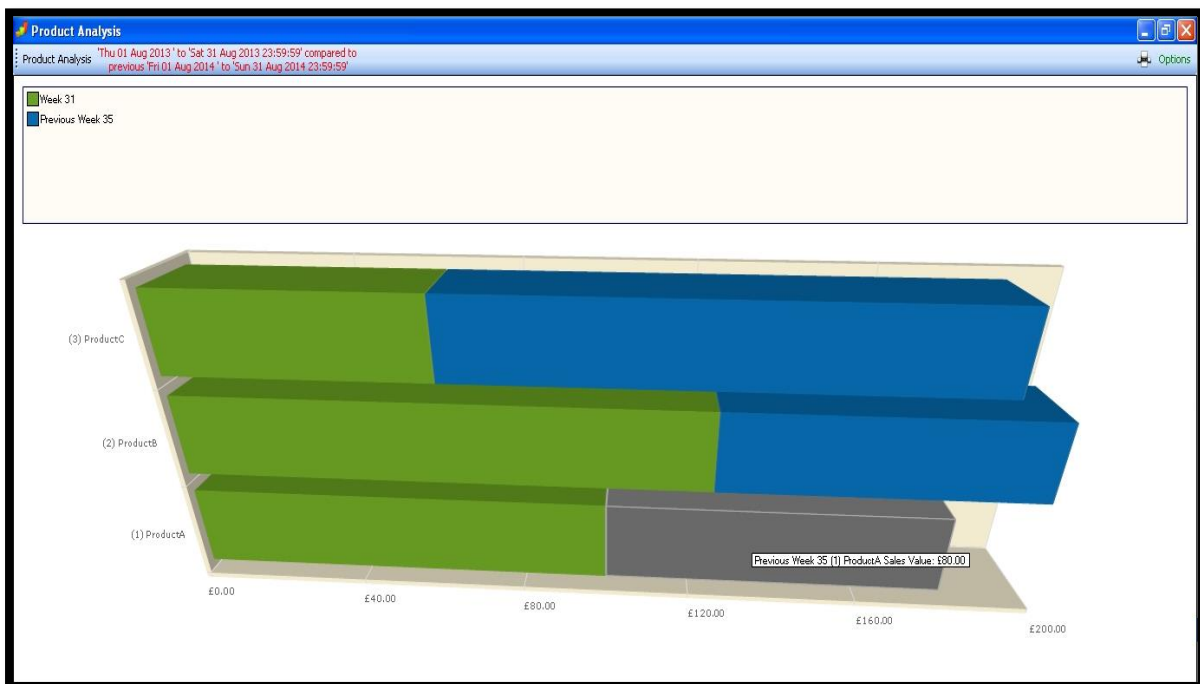


## Analyse / Quick Compare (Continued)

**Example3:** Showing a Product Analyse of 3 Products for August 2013 compared to August 2014 as a 'Bar Chart' graph

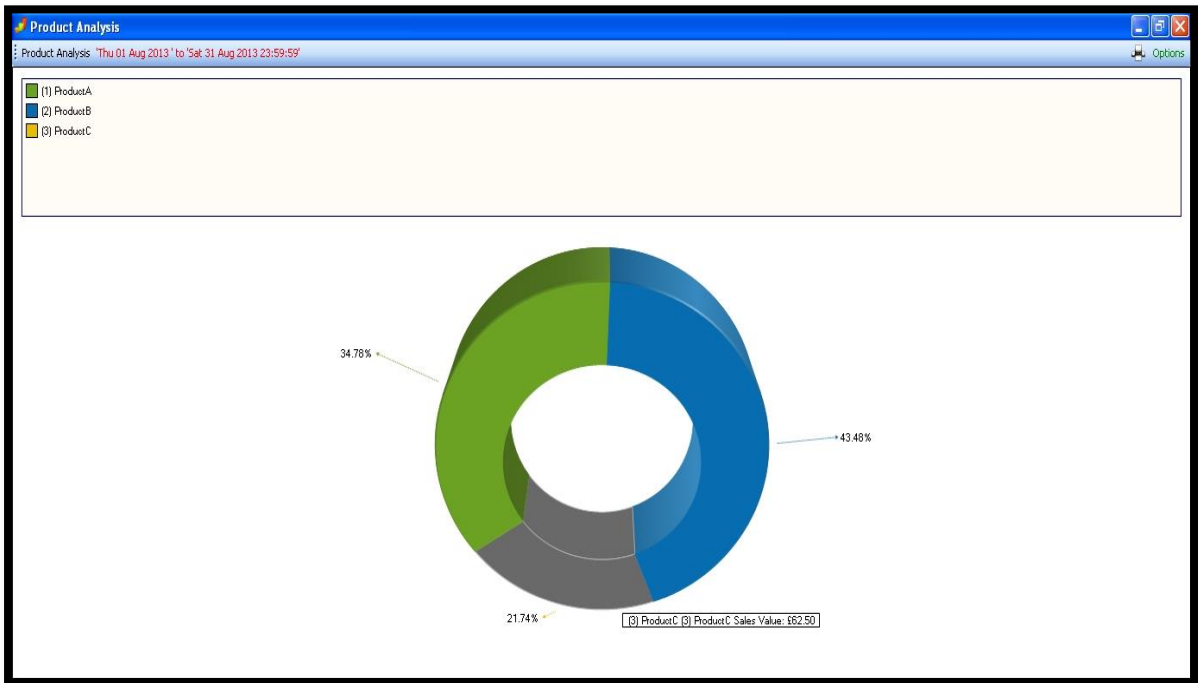


**Example4:** Showing a Product Analyse of 3 Products for August 2013 compared to August 2014 as a 'Stack 3D Bar Chart' graph.



## Analyse / Quick Compare (Continued)

**Example5:** Showing a Product Analyse of 3 Products for August 2013 as a 'Doughnut Chart 3D' graph.



## Analyse / Quick Compare (Continued)

### Product Reports

There are a variety of reports which make use of the information entered against product sales transactions.

Including for Example:

- **Product Report**
- **Product By Shelf Report**
- **Product Report Including Major Cost Entry**
- **Product Sales Per Day (Summary)**
- **Produce By Level/Modifier Report**
- **Product Weekly/Daily/Hourly Reports**
- **Sales Summary Report (Inc Tax And Media)**
- **Sales Information (Inc Tax and Media)**

General options that affect: Product Maintenance			
Category	Subsection	Title	Description
General Options	Defaults	Use Blank Code For Add Using Current	In the products applet, when using the 'add using current' feature, do you wish to leave the new products code as blank (otherwise get the next free code)
General Options	Products	Add to Label Queue when saving Products	Displays an option to add to a label queue after adding/editing a product from the product maintenance applet.
	Products	Cost Price additional Decimal Places	This is the amount of decimal places to use for the cost price (this is the amount of decimal places less 2, for example 8=10 decimal places altogether). A higher number is more accurate, a lower number is easier to read.
	Products	Filter Product Grid Realtime	When filtering the main product grid, do so on each key press, otherwise wait for the <enter> key.
	Products	Show Cost Price As Decimal On Main Product Screen	With this option turned off, it will display as a standard currency value
	Products	Update Linked Cost	When updating a product that has other products linked to it, then update the cost price of these products as well
	Products	Update Mixture Cost	If a product is part of a mixture, then update the cost price of the mixture as well
	Products	Update Mixture Selling Price	Automatically update the selling price of a mixture when a product that is linked to it is updated.
	Products	Warn if adding a Product code that has been deleted	When adding a new product, and the same product exists as a deleted item, warn the user and give them the chance to revive the deleted product.
Realtime GPoS	Products	Maximum Modifiers	This is the number of modifiers that you require (default = 5), you can increase this if necessary.

## Clerks

### Introduction To Clerks

A clerk is a member of staff who will operate the PoS system to some degree. The PoS requires a clerk to be logged on, in order for sales to be entered.

Clerks and their various settings are created/managed in Total Control Premier and sent down to the PoS.

In addition to the standard clerk settings, other settings are available which unlock additional functionality.

Clerks can be set as a 'Training Clerk' allowing them to enter practice transactions into the PoS which are not recorded as real sales.

Clerks can be set as a member of a Clerk Group (see Clerk Groups on page 106)

'Hourly Pay Rates' can be set against clerks allowing 'Time and Attendance' information to be recorded against the clerk, and reports to be generated showing the hours worked and the pay accrued.

Clerks can be associated with a default screen page, this allows the GPoS system to automatically show a specific screen for each clerk when they log on at the GPoS. In hospitality environments, this could be set automatically load the balance plan.

The screen can also be set to display the transaction grid on the left or right hand side (per clerk).

Additional user fields can be added against the clerks allowing the recording of any additional information required. (See User Fields on page 109)

Clerks can be set to have 'Manager Authority', and specific operation such as 'Refunds' can be set to require this authority. If a clerk is not set as having this authority attempts to carry out the function, then a clerk with this authority would be required to oversee the operation.

This logon can take place via entering a PIN, or using another method such as swiping a magnetic card or Dallas fob.

**Note:** The 'Alias' field is used to mask the clerks real name at the PoS. For example, if you have a large system with perhaps 500 clerks, you will need to enter each clerks full name in order to identify them. However, you (or indeed the clerk) might not want their full name appearing on a sales receipt. In this case you can use the alias field to enter a shortened name, or a nickname. This is the name that will be sent to the PoS and appear on the receipt.

## Clerks (Continued)

### Accessing the Clerks Screen

The Clerks screen can be accessed via



then

### The Clerks Screen (An overview)

Below is a screenshot of the main Clerks screen.

Clerks - Site #1 Site A (5)			
Add Edit Delete Process All Deletions Show Deletions Revive Clerk Print Show Filters			
Drag and Drop Column Header(s) here to Group the data			
Code	Name	Group	Alias
1	Lauren	Standard Clerk	Bunny
2	Olivia	Standard Clerk	Dizzy
3	Izzy	Standard Clerk	Rosy
4	Abigail	Manager	Bubbly
5	Leasa	Manager	The Boss

### Adding and Editing Clerks

When adding clerks the following fields are available:-

- **Code**
- **Description**
- **Alias**
- **Login Pin**
- **Training**
- **Clerk Group**
- **Pay Rate**
- **User Fields** (Note: These will only display if you have created any 'Clerk User Fields')
- **Ibutton**
- **Barcode**
- **MCR**
- **Training Clerk**
- **Has Manager Authority**
- **Default Screen**
- **Opens Drawer**
- **Screens on Left**
- **Auto Load Balance Plan**
- **Clerk Shift 1 – 8**
- **Clerk Group**



## Clerks (Continued)

### To add a Clerk

1. Click 'Add'
2. Enter the details required
3. Click 'Save'

### To Edit a Clerk

1. Select the required Clerk
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

### To Batch Edit Clerks

1. Select the required Clerks
2. Click 'Batch Edit' button (accessible by clicking the arrow displayed to the right of the Edit button)
3. Make the changes required
4. Click 'Save'

### To Delete Clerks

1. Highlight the Clerk to be deleted.
2. Click 'Delete'
3. You will be prompted to Confirm deletion (Click 'Yes')

**Important Note:** At the point of attempting to delete a 'Clerk', the system checks if any sales transactions are associated with that clerk. If any are found you will be prompted with:

*"Sales data has been found against some of the clerks you are attempting to delete. Removing SALES data will affect the Clerk Sales Reports and this cannot be undone."*

- Selecting '**Yes**' will mark the clerk for deletion.
- Selecting '**No**' will mark all clerks WITHOUT sales data for deletion.
- Selecting '**CANCEL**' will abort and NOT do anything.

**Warning:** Selecting '**YES**' (Option1 above) will remove SALES data from the reports and cannot be undone



Once clerks are marked for deletion, you need to send your updates to all your PoS. You can then return to the clerks screen and click "Process All Deletions" to remove the deleted clerks from the system.

## Clerks (Continued)

### Printing Clerk Lists

Clerks lists can be displayed, printed or exported, with different list types which show different information being available.

#### To Display Or Print a Clerk List

A clerk list can be displayed or printed in the following ways:-

1. Click 'Print' Button
2. Select to 'Display' or 'Print' the list

Available Clerk Lists are:

- Clerk List
- Clerk List (Inc ECR Specifics)
- Clerk List (Grouped)

**Example1:** A Clerk List

17/03/2015		<b>Clerk List</b>		Page 1 of 1	
<u>Code</u>	<u>Name</u>	<u>Login Code</u>	<u>Training</u>		
1	Lauren	1	No		
2	Olivia	2	No		
3	Izzy	3	No		
4	Abigail	4	No		
5	Leasa	5	No		
6	Richard	6	No		

**Example2:** A Clerk List Inc ECR Specifics

17/03/2015		<b>Clerk List Inc. POS Specifics</b>					Page 1 of 1		
<u>Code</u>	<u>Name</u>	<u>Login Code</u>	<u>Training</u>	<u>iButton</u>	<u>Barcode</u>	<u>MCR</u>	<u>Mngr Auth</u>	<u>Drawer</u>	<u>Screen Left?</u>
1	Lauren	1	No				No	0	No
2	Olivia	2	No				No	0	No
3	Izzy	3	No				No	0	No
4	Abigail	4	No				Yes	0	No
5	Leasa	5	No				Yes	0	No
6	Richard	6	No				Yes	0	No

### Clerk Reports

There are a variety of reports which make use of the information entered against clerk transactions. Including for Example:

- Product By Clerk Report
- Clerk Report
- Clerk Report By Hour
- Time And Attendance Report
- Time And Attendance With Costs Report
- Clerk Functions
- Product By Clerk Report (No Grouping)
- Clerk Report By Day
- Clerk By product Report
- Time And Attendance Summary Report
- Time And Attendance
- Clerk Functions (With Denominations)
- Clerk Report By Day By POS

## Clerk Groups

### Introduction To Clerk Groups

This feature allows you to create 'Clerk Groups' allowing you to better organise your 'Clerks'.

By default just 1 Clerk Group exists 'Standard Clerk' but other can be added as best suits your needs.

When using the 'Clerks' screen, the list of clerks can be filtered or grouped using the 'Clerk Group' field, allowing you to better manage clerks by the groups to which they belong.

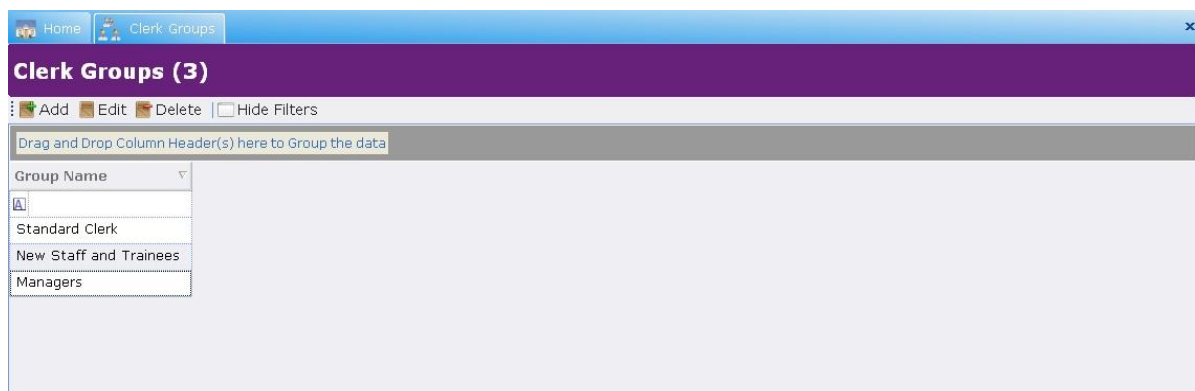
Additionally, of the reports available on the 'Clerks' Screen the 'Clerk List (Grouped)' report separates out the list of clerks by the 'Clerk Group' to which they belong.

### Accessing the Clerk Groups Screen

The Clerk Groups screen can be accessed via  General Databases ^ then  Other

### The Clerk Groups Screen (An overview)

Below is a screenshot of the main 'Clerk Groups' screen.



### Adding and Editing Clerk Groups

When adding Clerk Groups the following field is available:

- Description

#### *To add a Clerk Group*

1. Click 'Add'
2. Enter the details required
3. Click 'Save'

## Clerk Groups (Continued)

### To Edit a Clerk Group

1. Select the required Clerk Group
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

### To Delete Clerk Groups

1. Highlight the Clerk Group to be deleted.
2. Click 'Delete'
3. You will be prompted to Confirm deletion (Click 'Yes')

**Note:** You cannot delete Clerk Groups if they have Clerks associated with them, or if it is the last Clerk Group. Attempting to do so will result in a prompt.



**Example1:** Showing the 'Clerks' screen filtered to only show Clerks linked to the 'Clerk Group' 'Managers'.

Home Product Maintenance - Site #1 Clerks - Site #1				
<b>Clerks - Site #1 SiteA (23)</b>				
Add Edit Delete Print Hide Filters				
Drag and Drop Column Header(s) here to Group the data				
Code	Name	Group	Clerk D.O.B	Clerk Phone Number
=	A	= Managers	A	A
1	Ellen	Managers	26/08/1983	1482585343
2	Chris	Managers	01/01/1980	1234567891

**Example2:** Showing the 'Clerks' screen grouped by 'Clerk Group' with the 'Managers' Group expanded.

Home Clerks - Site #1				
<b>Clerks - Site #1 SiteA (23)</b>				
Add Edit Delete Print Hide Filters				
Group				
Code	Name	Clerk D.O.B	Clerk Phone Number	
=	A	A	A	
Group : Managers (2 items)				
1	Ellen	26/08/1983	1482585343	
2	Chris	01/01/1980	1234567891	
Group : New Staff and Trainees (20 items)				
Group : Standard Clerk (1 item)				

## Clerk Groups (Continued)

**Example3:** Showing the 'Clerk List (Grouped)' Accessed via the 'Clerks' screen.

17/03/2015		<b>Clerk List</b>		Page 1 of 1
<b>Standard Clerk</b>	<u>Code</u>	<u>Name</u>	<u>Login Code</u>	<u>Training</u>
	1	Lauren	1	No
	2	Olivia	2	No
	3	Izzy	3	No
<b>Manager</b>	6	Richard	6	No
	4	Abigail	4	No
	5	Leasa	5	No

## User Fields

### Introduction to User Fields

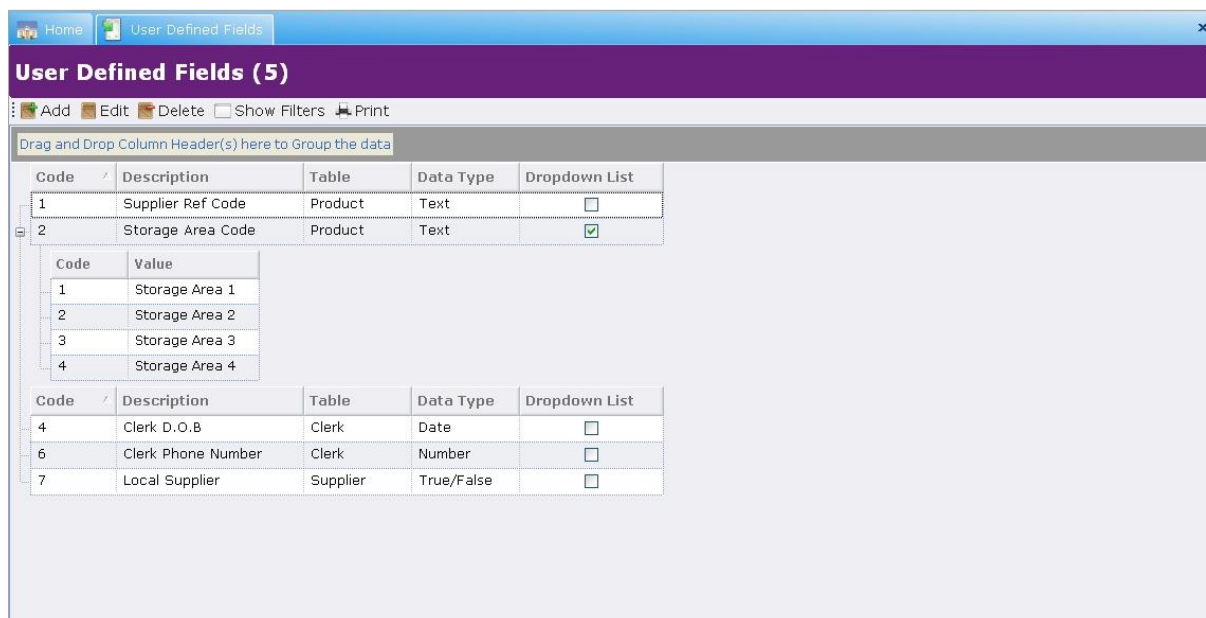
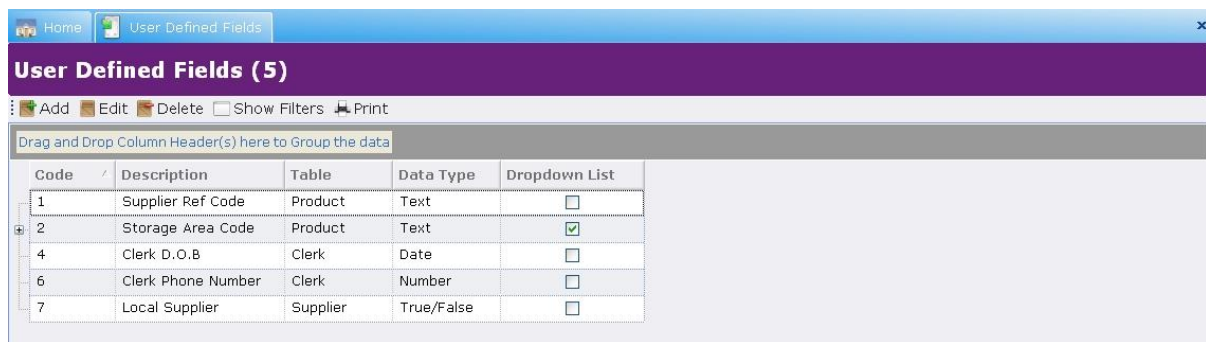
User fields can be added to Products, Clerks, and Suppliers to offer additional customisable fields for data entry. For example, a product user field could be created to store the size and colour of an item of clothing. User fields for clerks could be telephone and mobile numbers and for suppliers these could be used for sales or accounts contacts etc.

### Accessing the User Fields Screen

The User fields screen can be accessed via  Setup then  Userfields

### The User Fields Screen (An overview)

Below is a screenshot of the main user fields screen.



## User Fields (Continued)

### Adding and Editing User Fields

When adding user fields, the following fields are available:

- **Code** (This is auto generated and not available to edit/change)
- **Description**
- **Table** (Product, Clerk, Supplier)
- **Data Type** (Text, Number, Date, Boolean (True Or False))
- **Dropdown List**

#### *To Add a User field*

1. Click 'Add'
2. Enter the details required
3. Click 'Save'

#### *To Edit a User Field*

1. Select the required supplier
2. Click 'Edit'
3. Make the changes required
4. Click 'Save'

**Note:** When editing a user field, the table (Product, Clerk, Or Supplier) cannot be changed, nor can the data type (Text, Number, Date, Boolean).

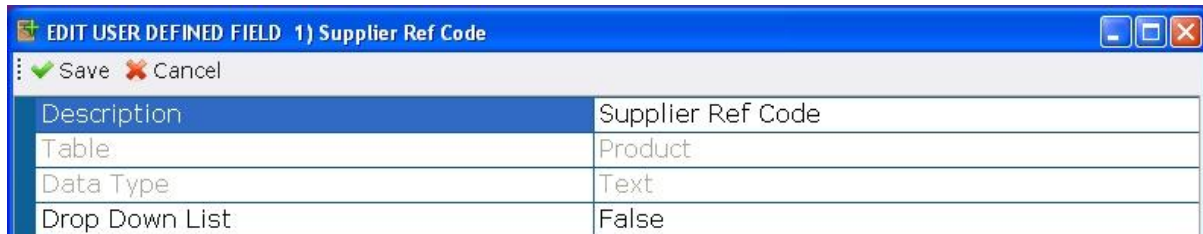
#### *To Delete User Field*

1. Highlight the user field to be deleted.
2. Click 'Delete'
3. You will be prompted to confirm deletion (Click 'Yes')

**Warning:** Deleting user fields will also remove any data stored in user fields from the system. This process cannot be undone.

## User Fields (Continued)

**Example1:** Showing a Product User field entitled 'Supplier Ref Code', being edited in the user fields screen. Note that as this is NOT a dropdown list, you will manually enter values when filling in the user field.



Description	Supplier Ref Code
Table	Product
Data Type	Text
Drop Down List	False

**Example2:** Showing a Product User field entitled 'Storage Area Code', being edited in the user fields screen. Note that as this is a dropdown list, you will select from a pre-defined list when filling in the user field.



Description	Storage Area Code
Table	Product
Data Type	Text
Drop Down List	True

**Description**  
Enter a name for this user defined field

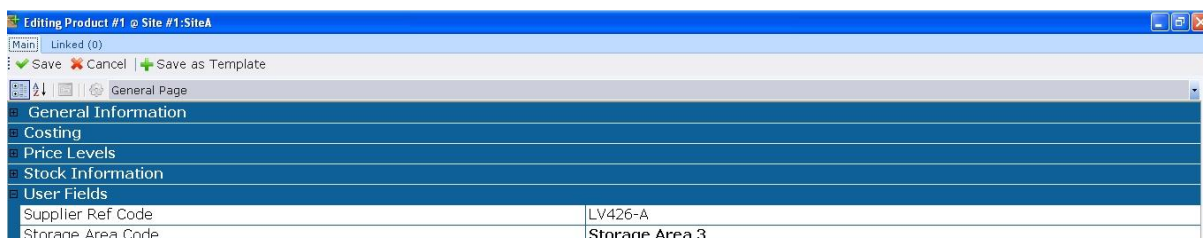
Move Up Move Down

Drag and Drop Column Header(s) here to Group the data

**Dropdown Value**

- Storage Area 1
- Storage Area 2
- Storage Area 3
- Storage Area 4

**Example3:** Showing both user fields from Examples 1 & 2 displayed when editing a product via the Product Maintenance screen.



Editing Product #1 @ Site #1: SiteA

Main Linked (0)

Save Cancel Save as Template

General Page

- General Information
- Costing
- Price Levels
- Stock Information
- User Fields

Supplier Ref Code	LV426-A
Storage Area Code	Storage Area 3



## User Fields (Continued)

### Printing User Field Lists

#### *To Print a User Field List*

A User Field List can be printed in the following way:

1. Click 'Print' button

#### **Example1:** A User Field List

Code	Description	Table	Data Type	Dropdown List
1	Supplier Ref Code	Product	Text	<input type="checkbox"/>
2	Storage Area Code	Product	Text	<input checked="" type="checkbox"/>
Code		Value		
1		Storage Area 1		
2		Storage Area 2		
3		Storage Area 3		
4		Storage Area 4		
Code	Description	Table	Data Type	Dropdown List
4	Clerk D.O.B	Clerk	Date	<input type="checkbox"/>
6	Clerk Phone Number	Clerk	Number	<input type="checkbox"/>
7	Local Supplier	Supplier	True/False	<input type="checkbox"/>

#### *User Field Reports*

There are a variety of reports which make use of the information entered against user fields.

Including for Example:

- **Stock Below Minimum Level By User Field**

Many other reports can be filtered using these user fields

## User Fields (Continued)

General options that affect: User Fields			
Category	Subsection	Title	Description
Stock Options	General Stock	Show User Field On Trans	When set to "True", this will show a selected user field in the "reference" column of the transaction grid for each product. This setting uses the user field selected in the setting "User Field for Data Entry" as the user field to show on the grid.
Stock Options	Ordering	Display User Field On Email	If a user field is selected via the "User Field for Data Entry" setting, then setting this value to "True" will replace your product code with the user field when sending emails to your supplier. This allows you to set up a user field that contains your suppliers reference code for the product.
Stock Options	Transaction Entry	Allow Selection For Any User Field	If you are entering your products by typing in a user field value (rather than product code), the system will default to checking the value against the user field defined on the "User Field for data Entry" setting. Changing this option to "True" will force the system to check all user fields for the value entered.
Stock Options	Transaction Entry	User Field For Data Entry	If you have created a user field for a suppliers reference code, it might be easier to enter this code, rather than having to find the product code in your database. If this is the case, then set that user field here.
Barcode Handheld Terminal	Setup	Include User Field	If your BHT device can support it, include a user field for additional information.
Barcode Handheld Terminal	Setup	User Field For Additional Info	Select the user field which contains the "additional info" described above. Please note that the BHT device will only display the first 20 characters of any data entered into the given user field.