Portal User Guide

Configuring the Scheduler

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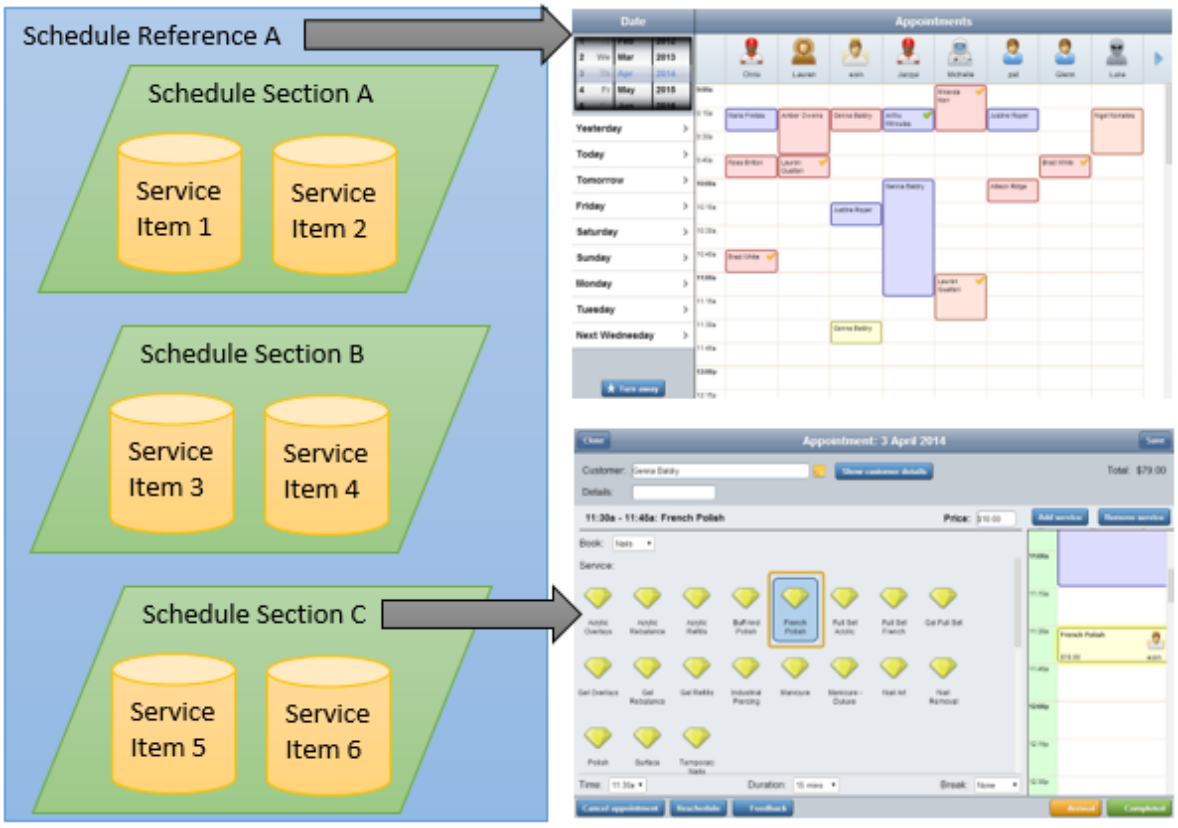
Managing the Scheduler Configuration

You can configure how the Scheduler operates using the Portal.

To run the Scheduler, you must create:

- At least one schedule reference, which represents an individual schedule.
- At least one section within that schedule reference, which groups service items together.
- At least one service item within that section that customers can make an appointment for.



Service items are added from items already in your Inventory. See *Managing inventory in the Portal*.

For information on using the Scheduler to book appointments, see *Managing appointments*.

See:

- *Schedule Id Maintenance screen* on page 16.
- *Scheduler KPI Setup Editor screen* on page 66.
- *Scheduler Maintenance screen* on page 58.

- *Scheduler Services Maintenance screen* on page 41.
- *Schedule Section Id Maintenance screen* on page 35.
- *Appointment Customer report* on page 68.
- *Appointments For Customer report* on page 71.
- *Clerk Scheduler Sales report* on page 81.
- *Performance Tracker report* on page 84.
- *Scheduler Customers report* on page 88.
- *Schedule Edit report* on page 18.
- *Scheduler Detail Services report* on page 76.
- *Scheduler report* on page 53.
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- *Mail Out Detail Maintenance screen* on page 98.
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- *Scheduler Mail Out Generation report* on page 107.
- *Scheduler SMS Generation report* on page 112.
- *Sites Email report* on page 117.
- *Sites SMS Summary report* on page 123.

What you can do:

- *Configuring the scheduler for your site* on page 6.
- *Creating a new schedule reference* on page 10.
- *Editing a schedule reference* on page 12.
- *Deleting a schedule reference* on page 14.
- *Creating a new schedule section* on page 20.
- *Editing a schedule section* on page 22.
- *Adding items to a schedule section* on page 24.
- *Editing items in a schedule section* on page 28.
- *Removing items from a schedule section* on page 30.
- *Deleting a schedule section* on page 33.
- *Editing an appointment* on page 50

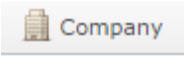
Configuring the scheduler for your site

Use the Site Options - Scheduler section to configure your site to use the external scheduler to manage appointments.

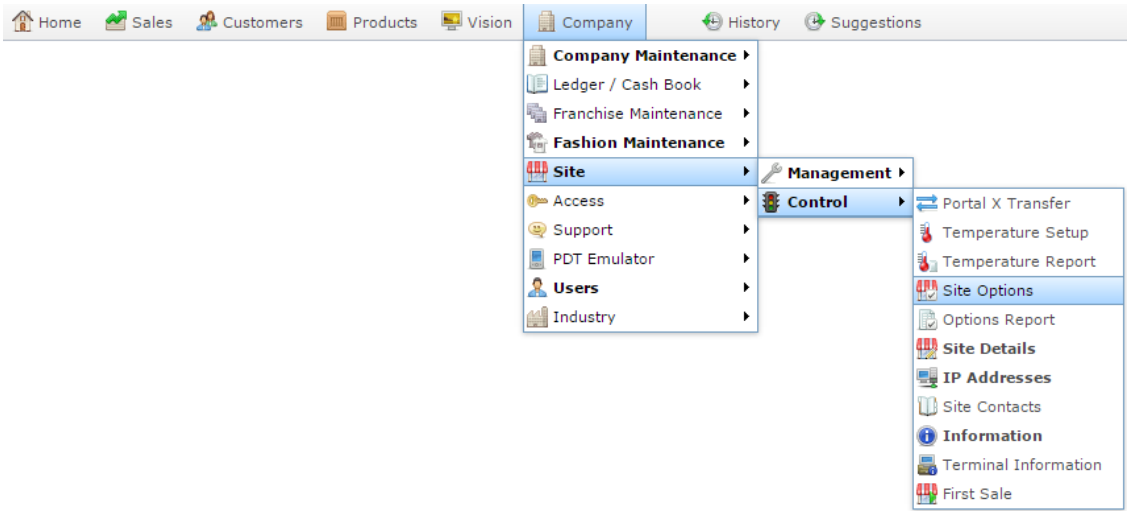
See *Managing the Scheduler Configuration* on page 4.

Opening the Site Options - Scheduler section

To open the Site Options - Scheduler section:

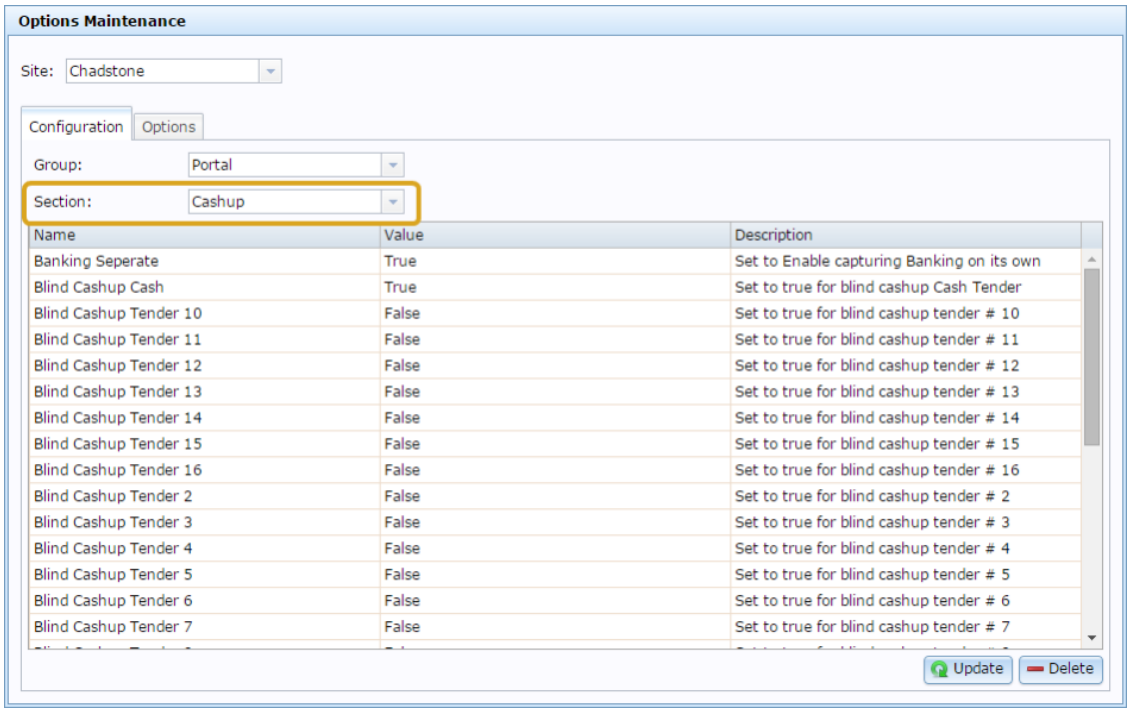
1. Press 

.
2. Press Site > Control > Site Options.



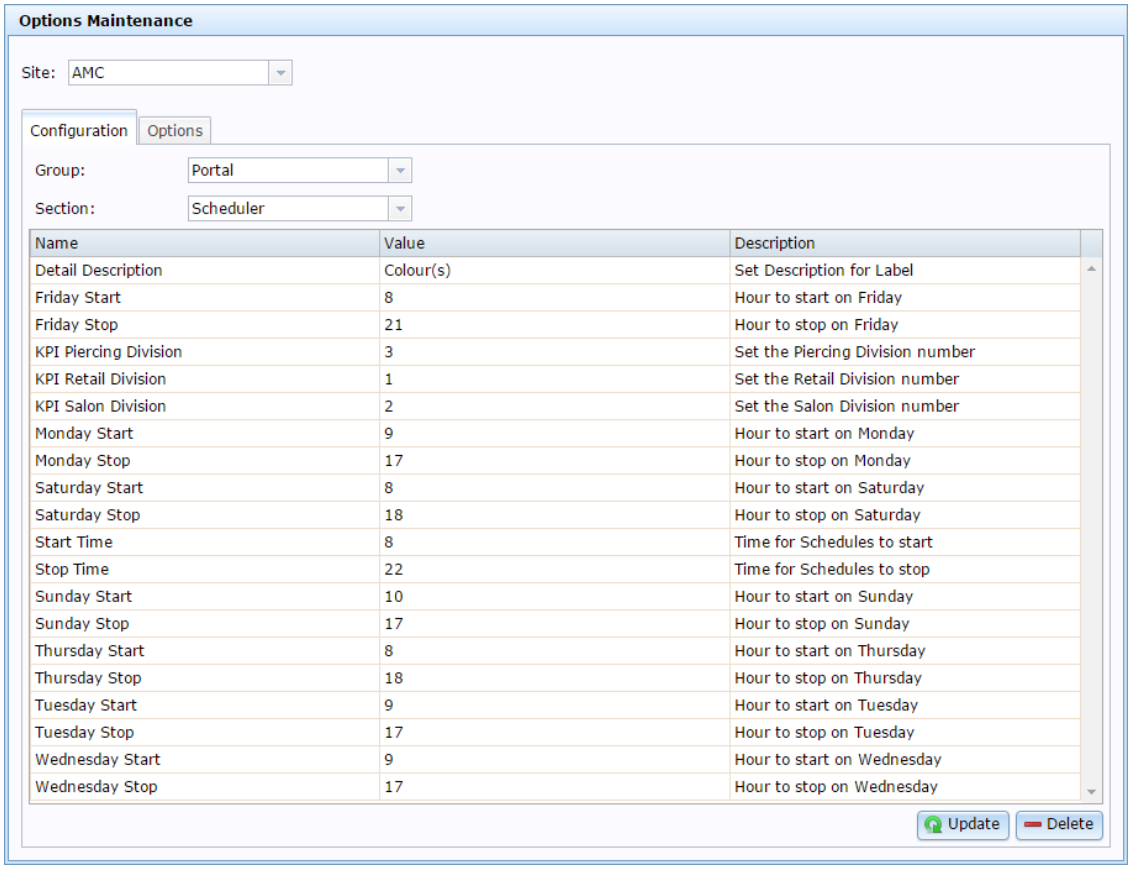
   The Cashup section of the Site Options screen is displayed.

3. Open the Section drop-down list.



4. Press Scheduler from the Section drop-down list.

   The Scheduler section is displayed.



Site Options - Scheduler section key fields and buttons

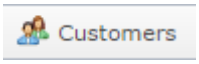
Field	Description
Detail Description	Type the description to appear for labels.
Day-of-week Start	Type the hour to open business on this day of the week. **Note:** Type a number in 24 hour time. For example, if you want to start at 9am, type **9**. If you want to start at 5pm, type **17**.
Day-of-week Stop	Type the hour to close business on this day of the week. **Note:** Type a number in 24 hour time. For example, if you close at 5pm type **17**.
KPI Piercing Division	Type the number of the division used for this schedule area. **Note:** The divisions listed here depend on your Portal configuration.
KPI Retail Division	Type the number of the division used for this schedule area.
KPI Salon Division	Type the number of the division used for this schedule area.

Field	Description
Start Time	Type the earliest hour appointments can be scheduled, independent of whether your business is open during this time. **Note:** Type the number in 24-hour time. For example, if the earliest appointment is 2pm, type **14**. Appointments cannot be scheduled before this time, even if your business is open.
Stop Time	Type the hour that appointments can't be scheduled past, independent of whether your business is open during this time. **Note:** Type the number in 24-hour time. For example, if the latest appointment is 2pm, type **14**. Appointments cannot be scheduled past this time or extend into this time, even if your business is open.

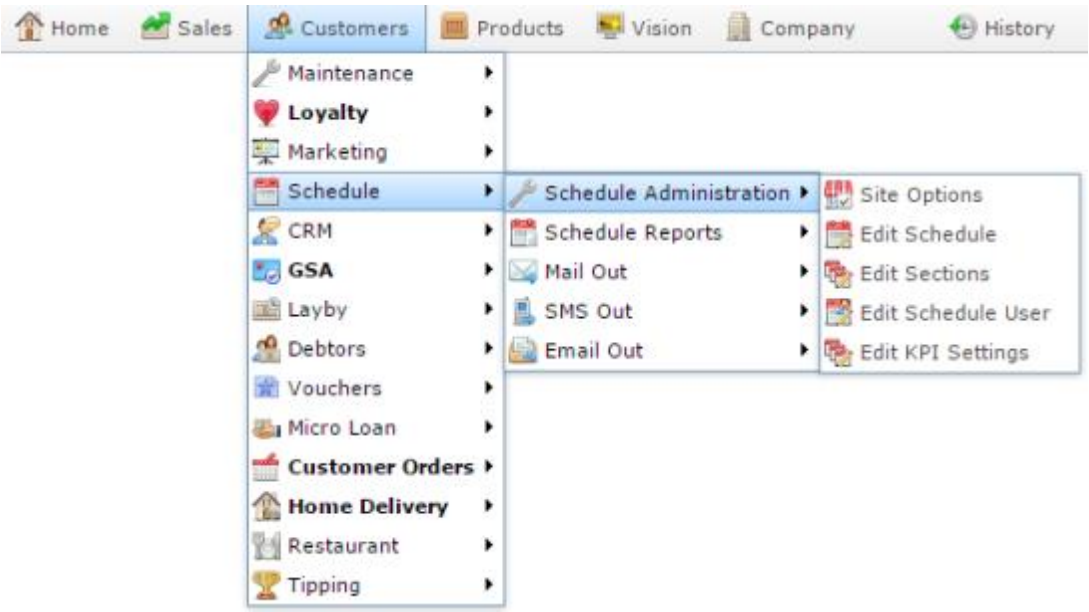
Creating a new schedule reference

Create a schedule reference when you want to create a new independent schedule to use in the Scheduler.

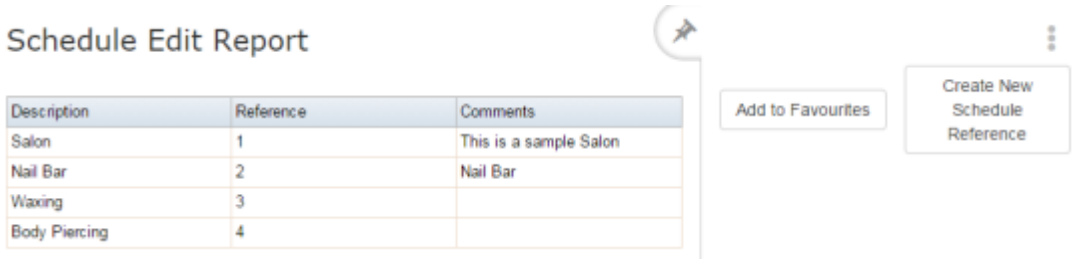
To create a new schedule reference:

1. Press 

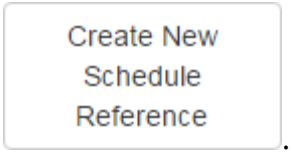
from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.



The Schedule Edit report is displayed.



Description	Reference	Comments
Salon	1	This is a sample Salon
Nail Bar	2	Nail Bar
Waxing	3	
Body Piercing	4	

3. Press 

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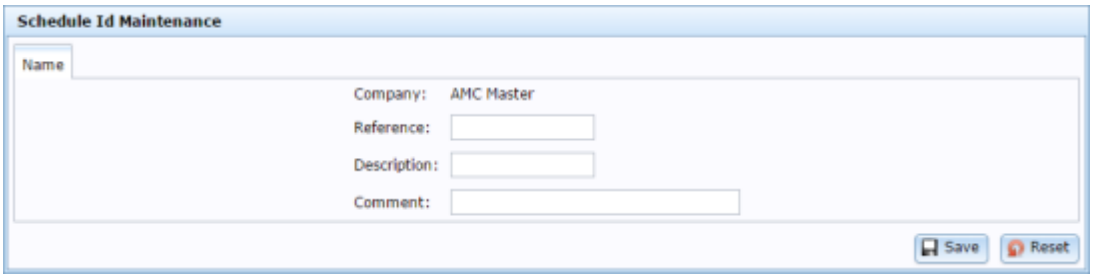
The Schedule Id Maintenance screen is displayed.



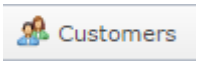
4. Type a unique code to identify the reference in the Reference field.
5. Type the description displayed in the Scheduler in the Description field.
6. Press Save.

   The schedule reference is created.

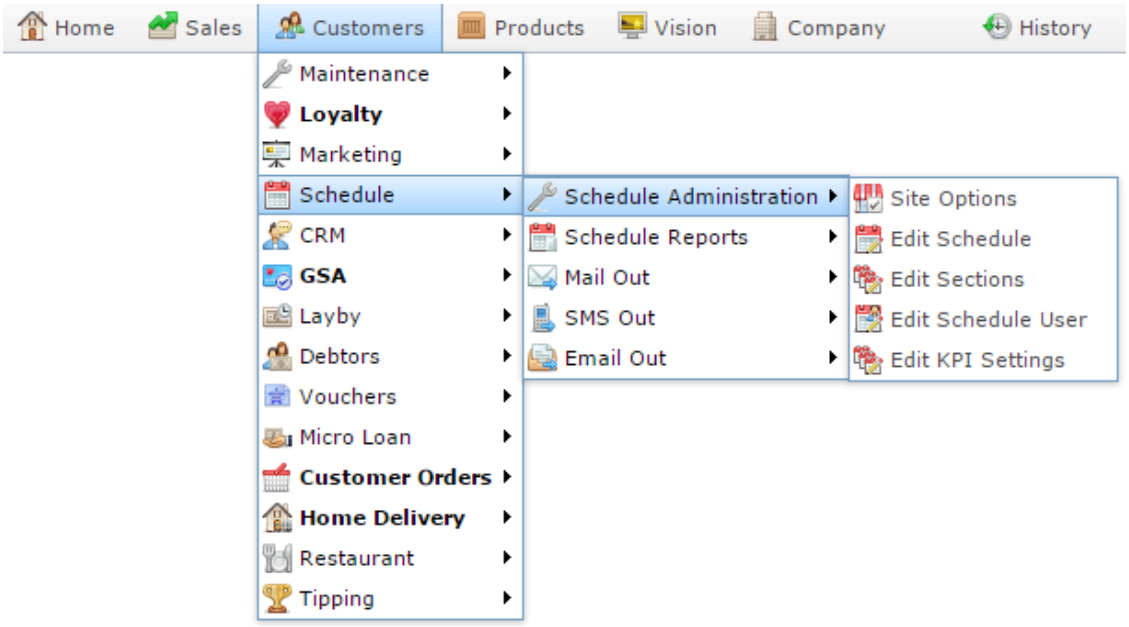
Editing a schedule reference

Edit a reference to change the description that appears in the Scheduler or add a comment.

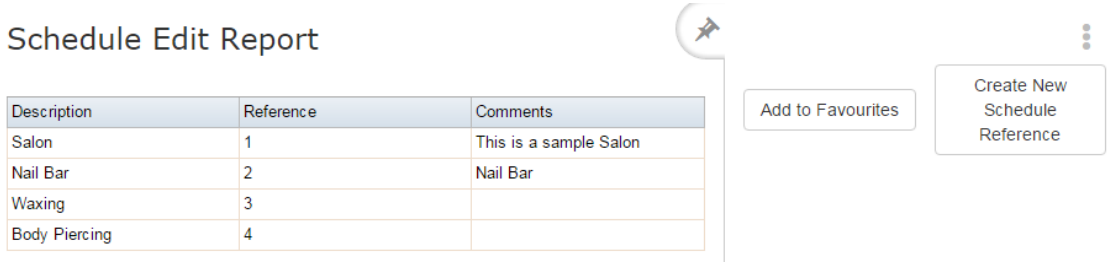
To edit a schedule reference:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.



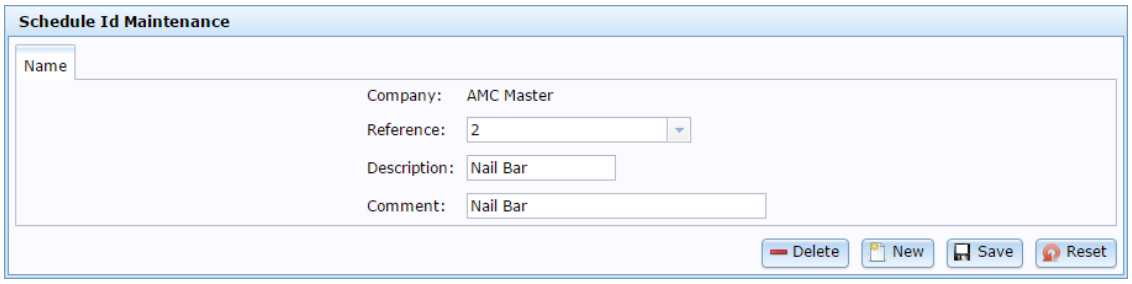
The Schedule Edit report is displayed.



Description	Reference	Comments
Salon	1	This is a sample Salon
Nail Bar	2	Nail Bar
Waxing	3	
Body Piercing	4	

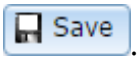
3. Press the Description of the schedule reference you want to view.

   The Schedule Id Maintenance screen is displayed.



4. Make the required changes.

   See *Schedule Id Maintenance screen* on page 16.

5. Press 

.

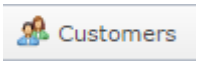
   The changes are saved.

Deleting a schedule reference

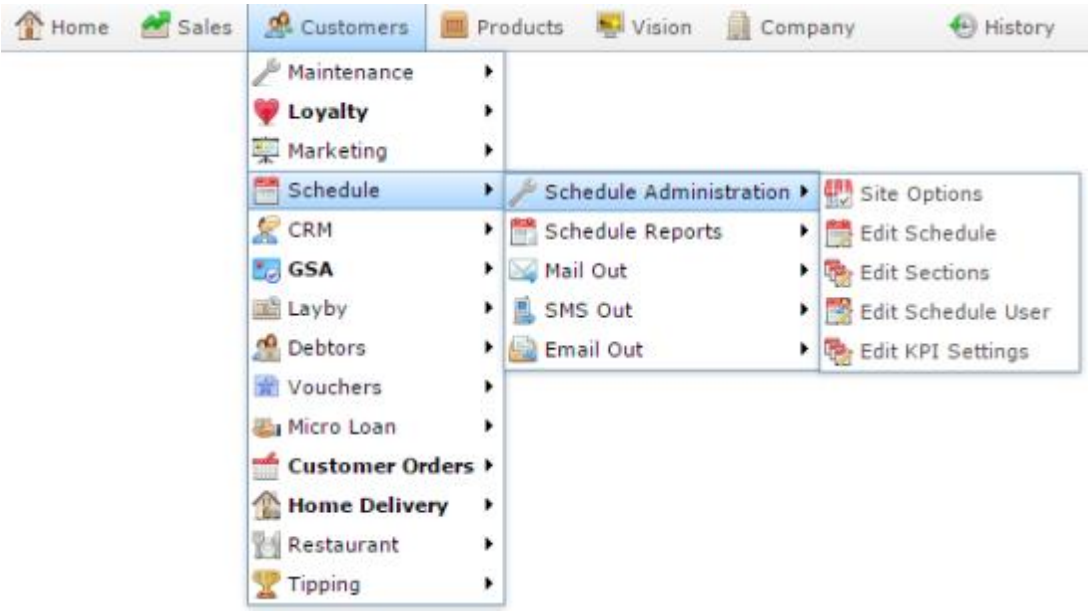
Delete a schedule reference to remove it from the Scheduler.

Note: Make sure you move any linked items prior to deleting the schedule reference.

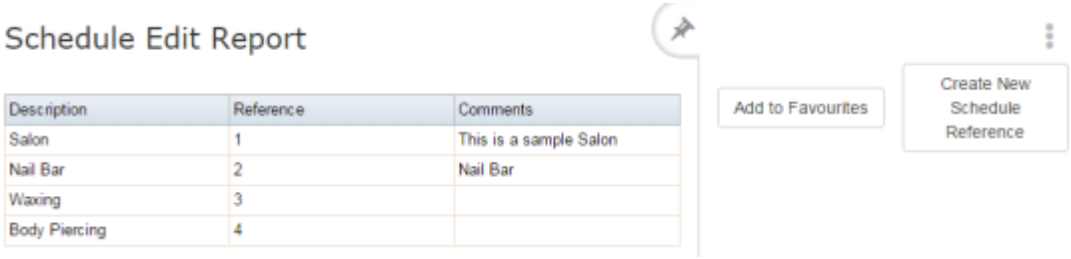
To delete a schedule reference:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.



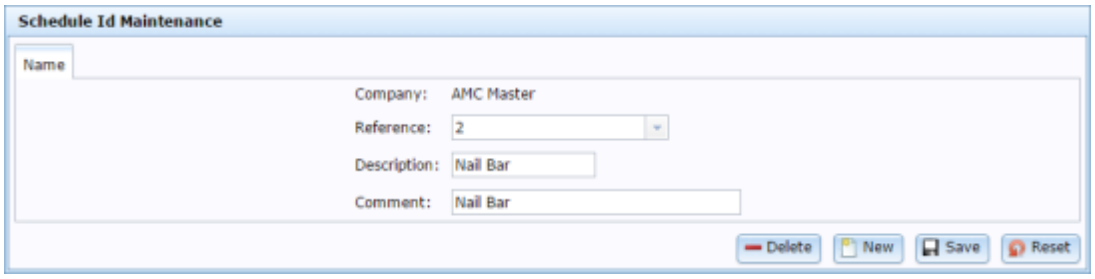
The Schedule Edit report is displayed.



Description	Reference	Comments
Salon	1	This is a sample Salon
Nail Bar	2	Nail Bar
Waxing	3	
Body Piercing	4	

3. Press the Description of the schedule reference you want to delete.

   The Schedule Id Maintenance screen is displayed.



4. Press

.

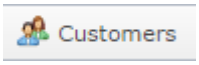
   The schedule reference is deleted.

Schedule Id Maintenance screen

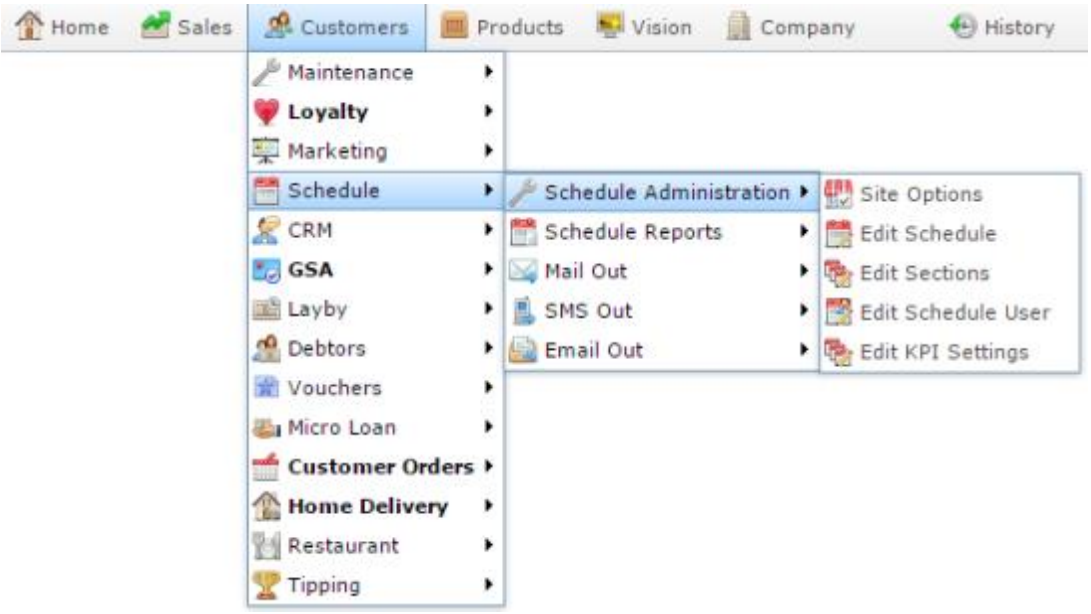
Use this screen to create and edit schedule references for independent areas of your business. For example, a manicure service and hair styling service in a salon, which run their own schedules independently of each other.

Opening the Schedule Id Maintenance screen

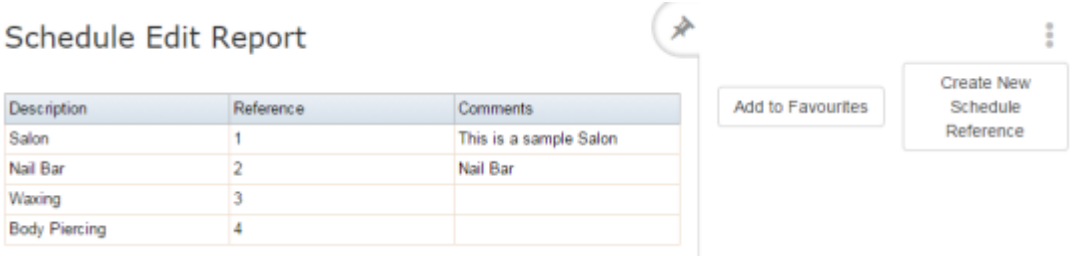
To open the Schedule Id Maintenance screen:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.



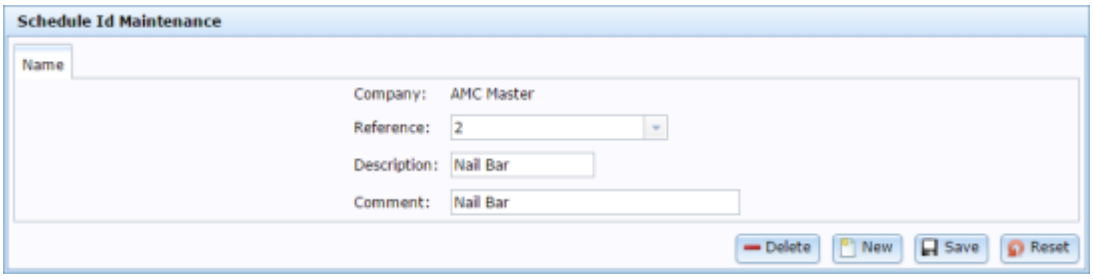
The Schedule Edit report is displayed.



Description	Reference	Comments
Salon	1	This is a sample Salon
Nail Bar	2	Nail Bar
Waxing	3	
Body Piercing	4	

3. Press the Description of the schedule reference you want to view.

   The Schedule Id Maintenance screen is displayed.



Schedule Id Maintenance screen key fields and buttons

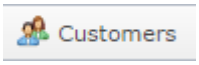
Field	Description
Company	The company the schedule configuration relates to.
Reference	Unique code identifying the schedule reference.
Description	Description of the schedule reference that appears in the Scheduler.
Comment	Comment describing the reference.
Delete	Press to delete this schedule reference. **Note:** This does not affect any appointments.
New	Press to create a new schedule reference.
Save	Press to save any changes to this schedule reference.
Reset	Press to undo any changes to this schedule reference since you last saved it.

Schedule Edit report

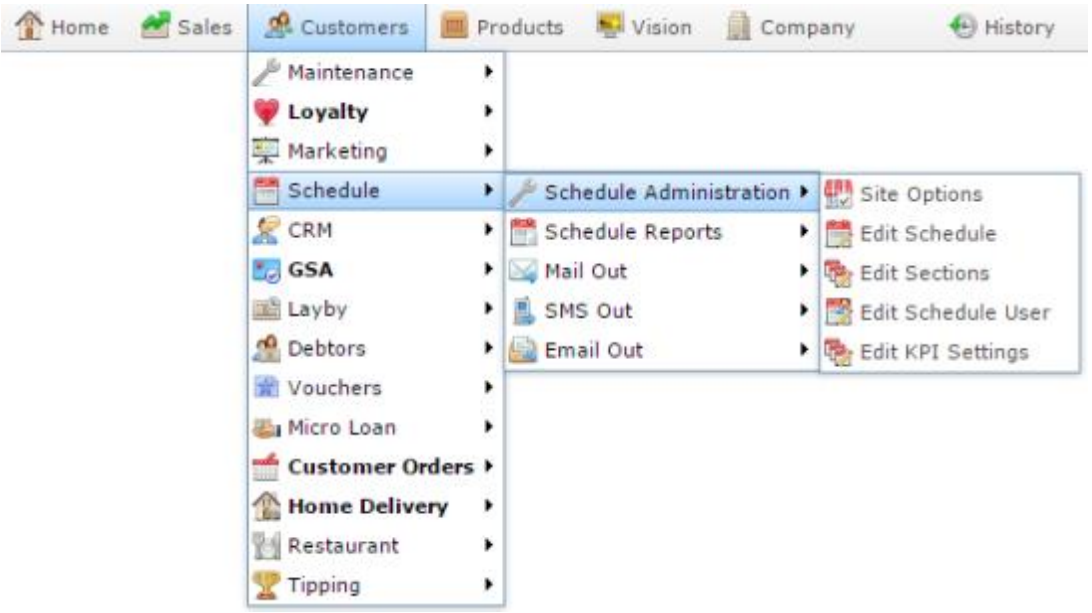
Use the Schedule Edit report to

Opening the Schedule Edit report

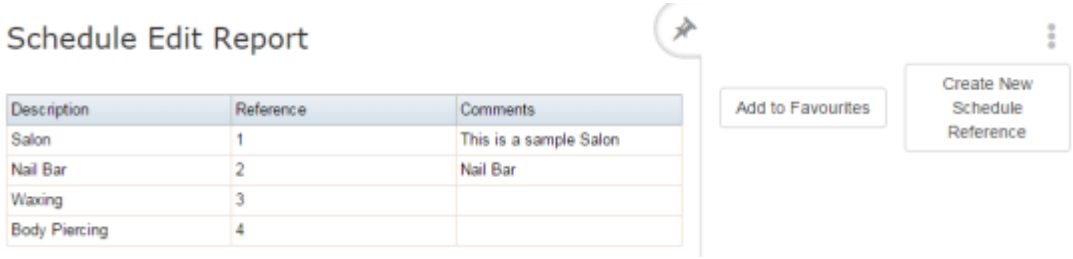
To open the Schedule Edit report:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.



The Schedule Edit report is displayed.



Description	Reference	Comments
Salon	1	This is a sample Salon
Nail Bar	2	Nail Bar
Waxing	3	
Body Piercing	4	

Schedule Edit report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Create New Scheduler Section	Press to create a new schedule section.

Report area

This area displays report information.

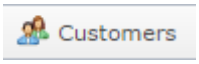
> **Note:** Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Name of the schedule reference.
Reference	Unique code identifying the schedule reference.
Comments	Any comment on the schedule reference.

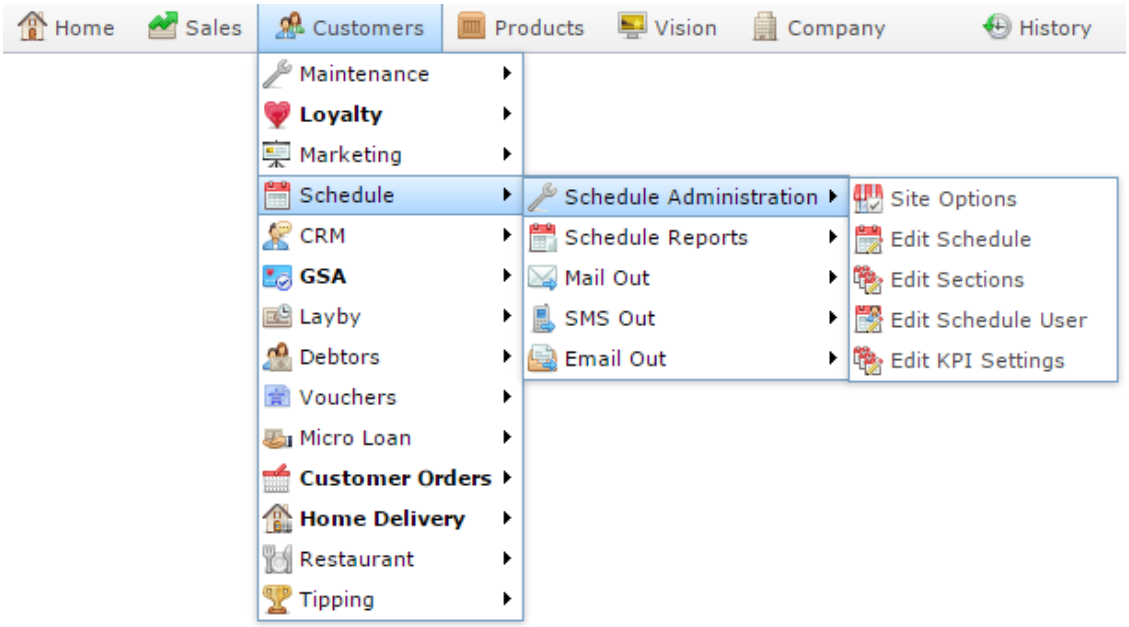
Creating a new schedule section

Create a new schedule section when you want to group service items together so they can be found easily in the Scheduler. For example, all of your hair cut service items together.

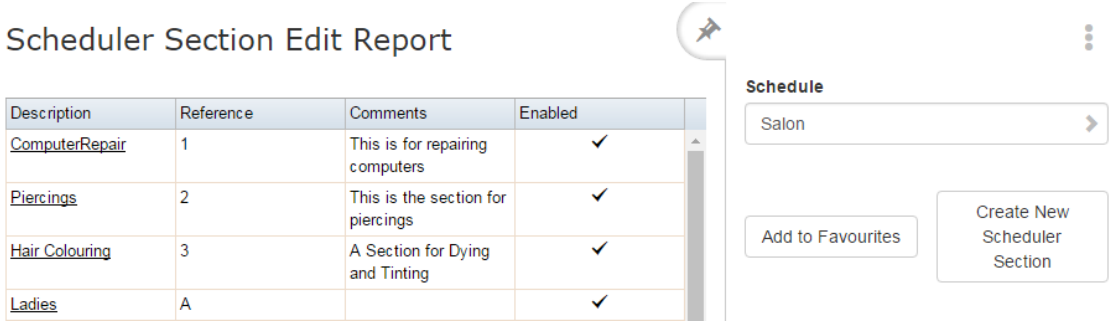
To create a new schedule section:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.



The Scheduler Section Edit report is displayed.

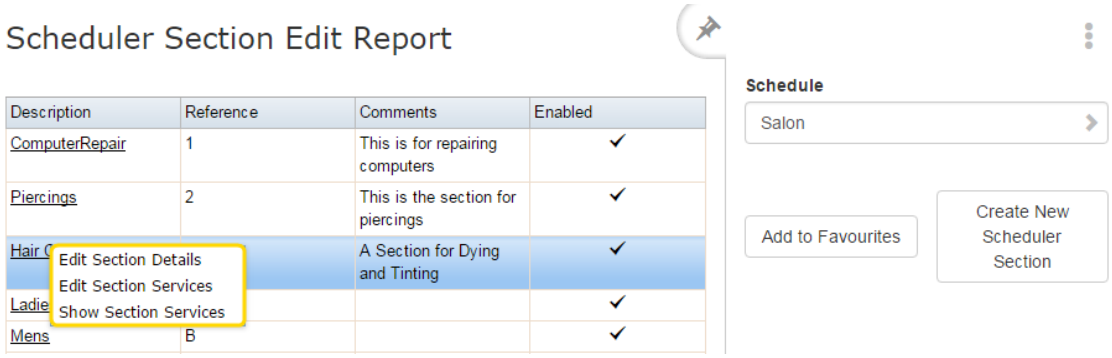


3. Select the schedule reference you want to create a section for in the Schedule filter.

> **Note:** You cannot change the schedule reference later. Make sure you select the correct reference.

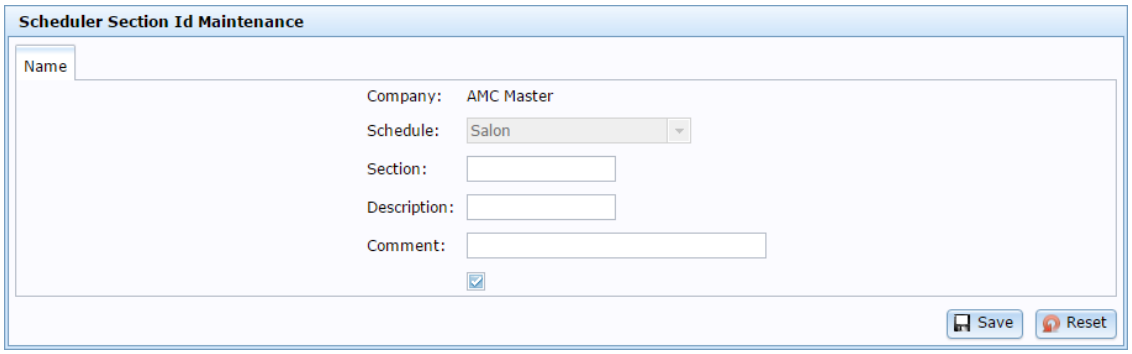
4. Press the Description of the section you want to view.

A popup is displayed.



5. Press Edit Section Details.

   The Schedule Section Id Maintenance screen is displayed.



6. Type a unique code to identify the section in the Section field.
7. Type a description of the section in the Description field.
8. Press Save.

   The section is created and is ready for items to be added.

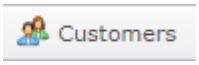
   See *Adding items to a schedule section* on page 24.

Editing a schedule section

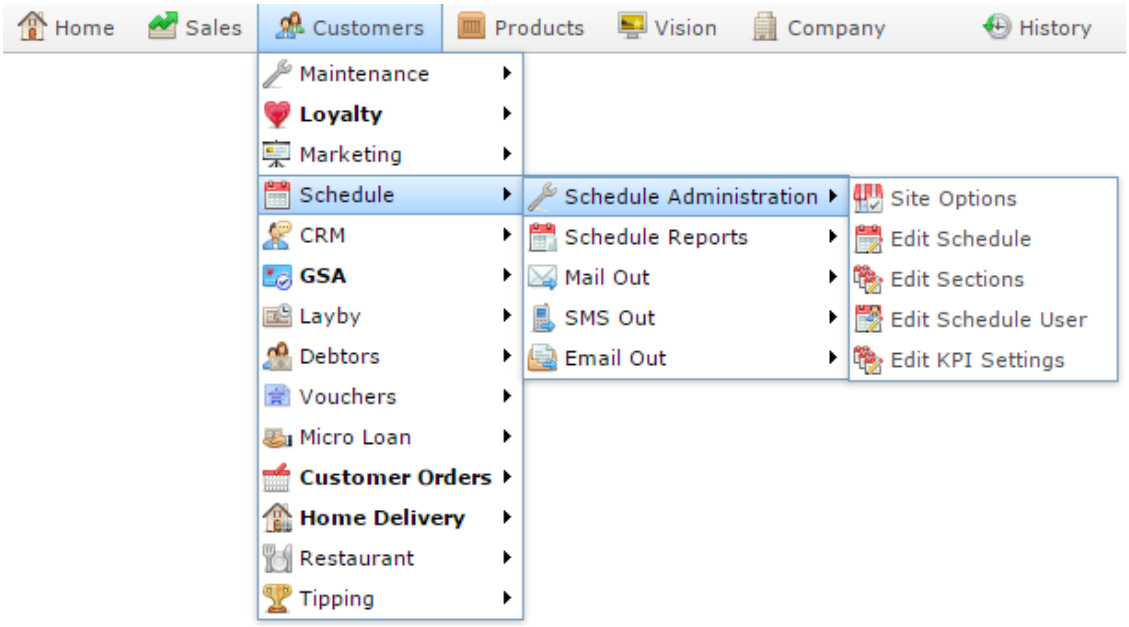
Edit a schedule section to change the description that appears in the Scheduler.

> **Note:** If you want to add or remove items from the section, see *Adding items to a schedule section* on page 24.

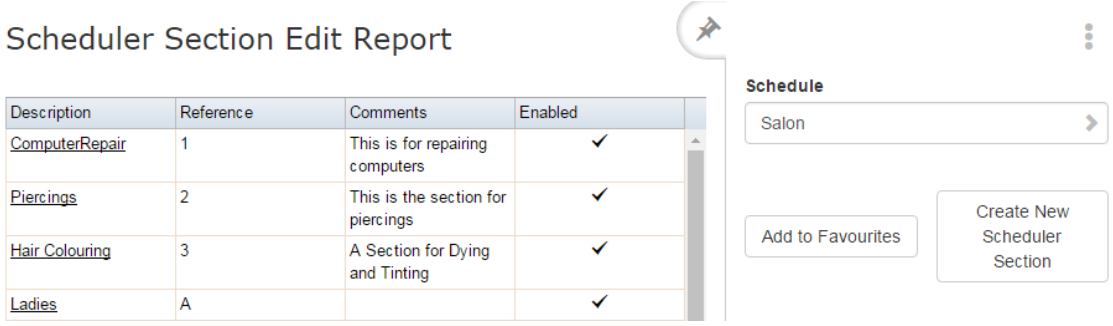
To edit schedule section:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.

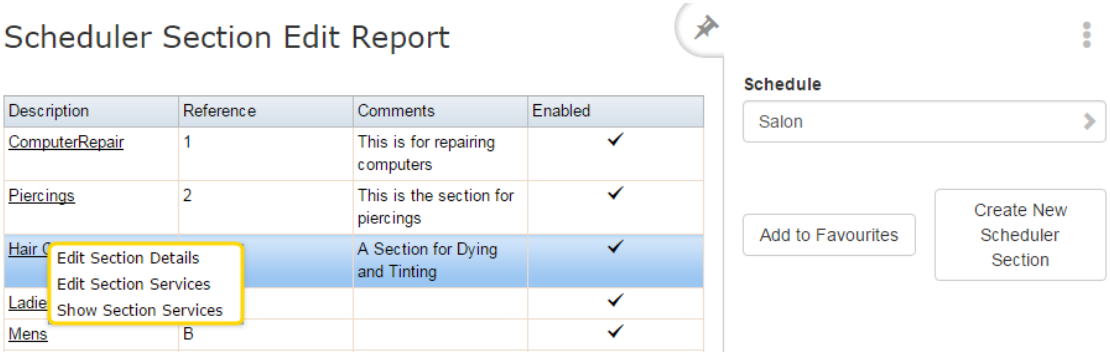


The Scheduler Section Edit report is displayed.



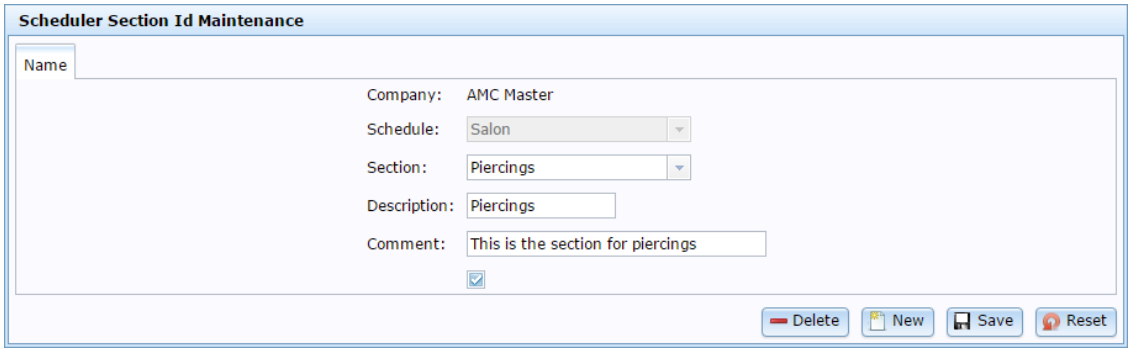
3. Press the Description of the section you want to view.

   A popup is displayed.



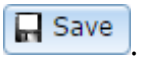
4. Press Edit Section Details.

   The Schedule Section Id Maintenance screen is displayed.



5. Make the required changes.

   See *Schedule Section Id Maintenance screen* on page 35.

6. Press 

.

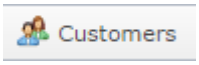
   The section is saved.

Adding items to a schedule section

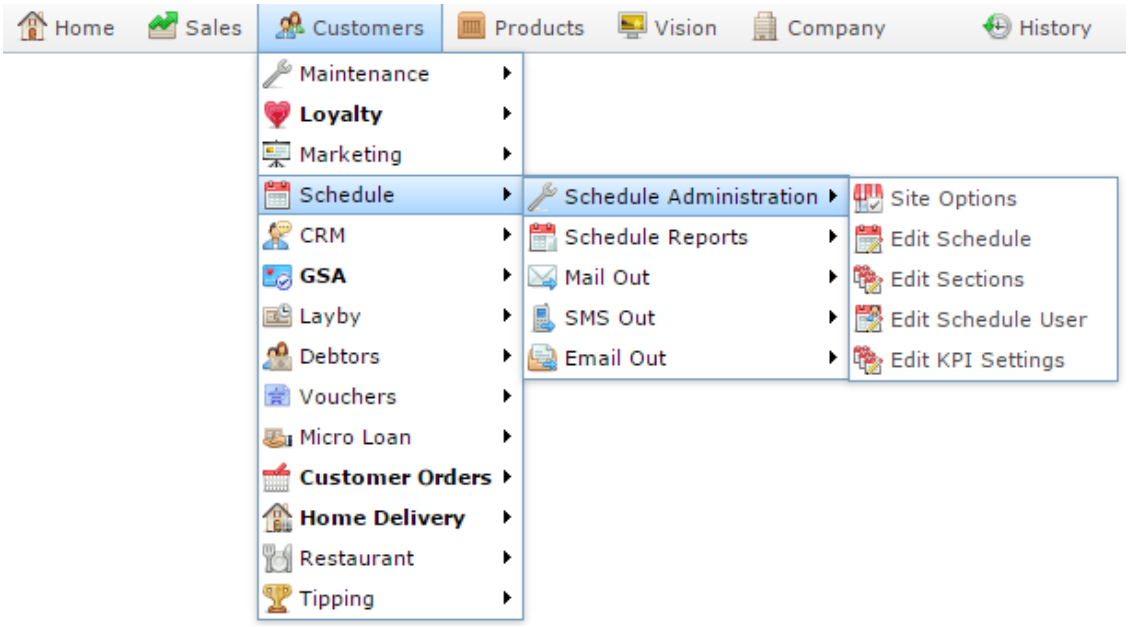
Add items to a schedule section to make them available for appointments on the Scheduler.

> **Note:** You must have a schedule section ready to add items to. See *Creating a new schedule section* on page 20.

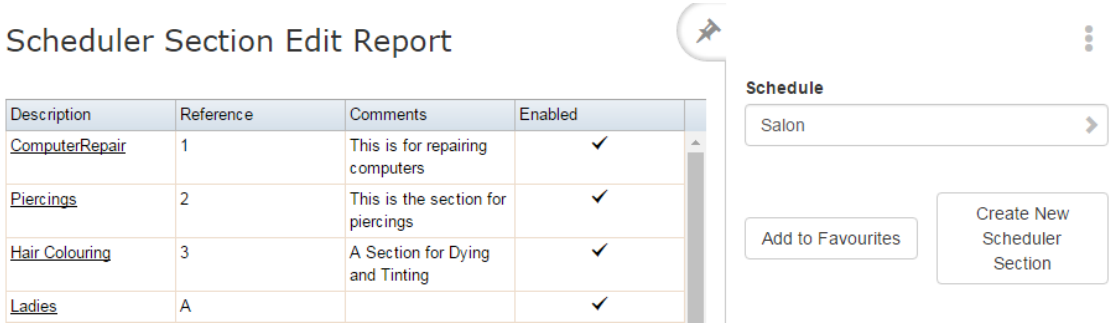
To add items to a schedule section:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.

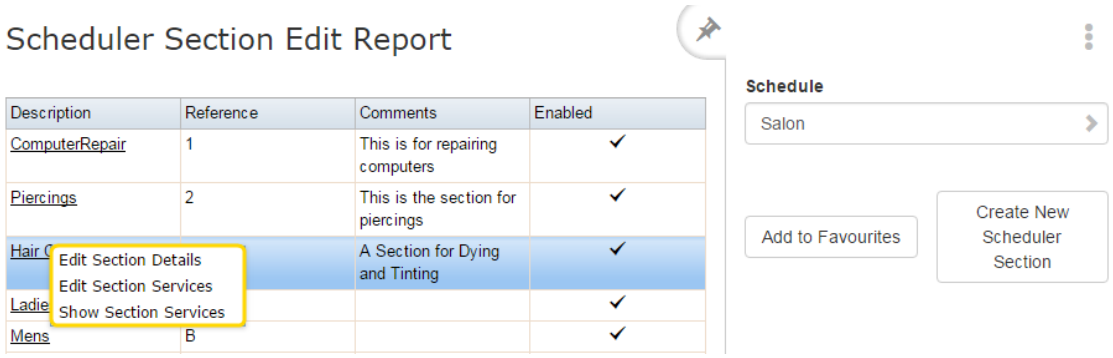


The Scheduler Section Edit report is displayed.



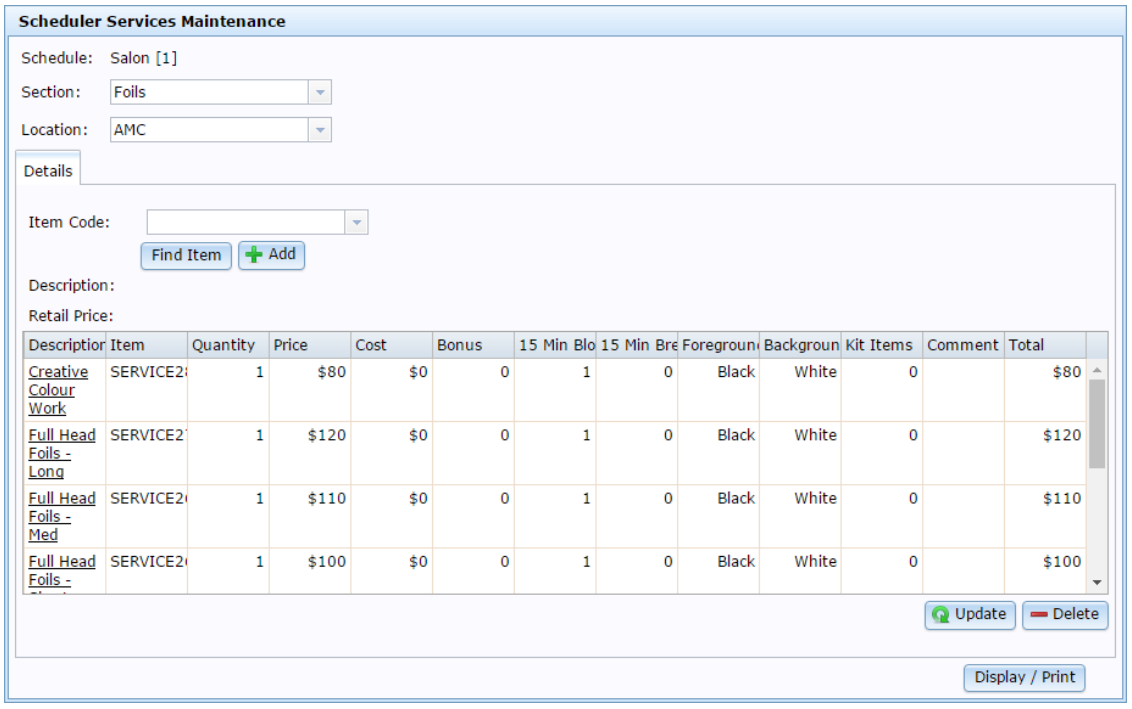
3. Press the Description of the section you want to view.

   A popup is displayed.



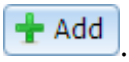
4. Press Edit Section Services.

   The Scheduler Services Maintenance screen is displayed.



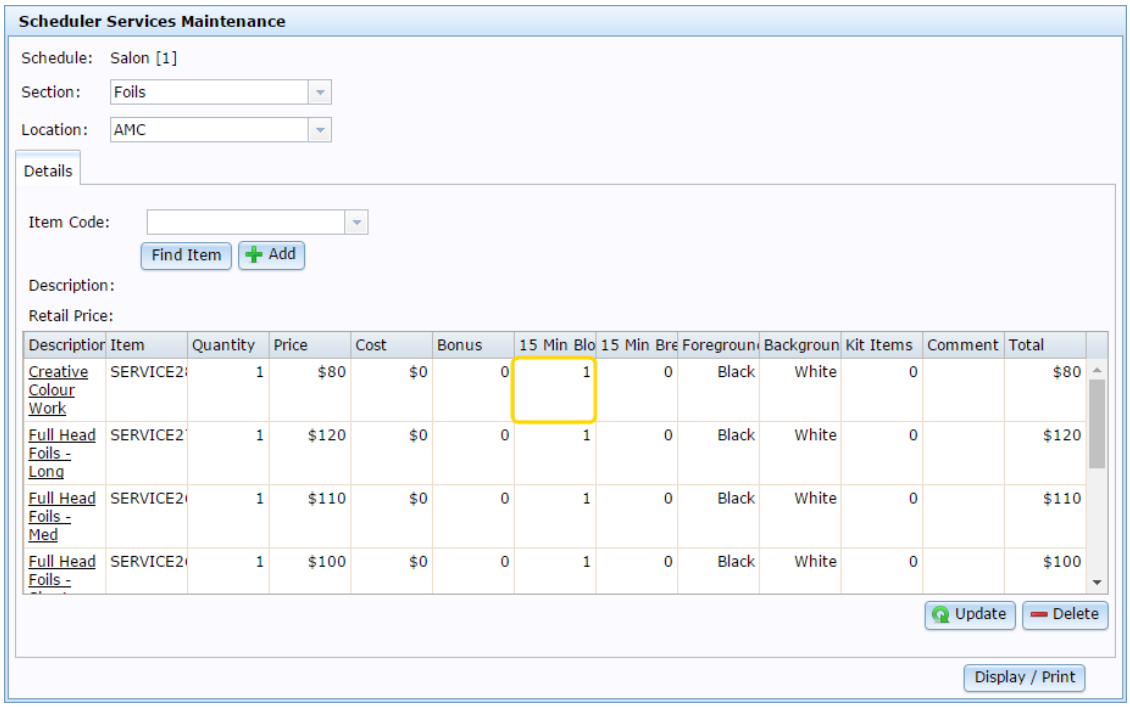
5. Search for the item you want to add in the Item Code field.

   See *Finding an item with a search field*.

6. Press  .

   The item is added to the service grid.

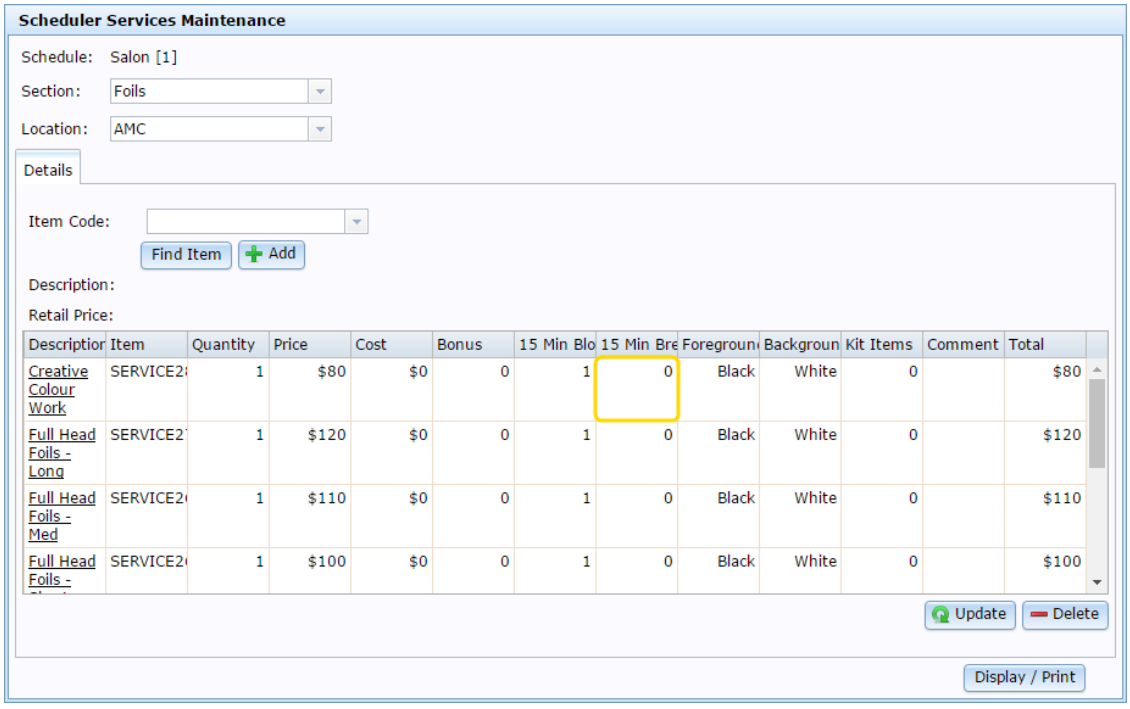
7. Press the 15 Min Block field for the item in the service grid.



8. Type the number of 15 minute blocks this service takes.

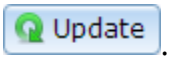
> **Note:** If a service takes part of a block, round up. For example, a 35 minute service takes **3** blocks.

9. Press the 15 Min Break field for the item in the service grid.



10. Type the number of 15 minute breaks included in the service.

> **Tip:** These are periods that the customer is required to stay or wait, but the staff are not actively working. For example, while waiting for a hair dye to set. Staff may be allocated other appointments during a break.

11. Press 

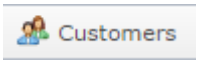
.

    Your changes are saved.

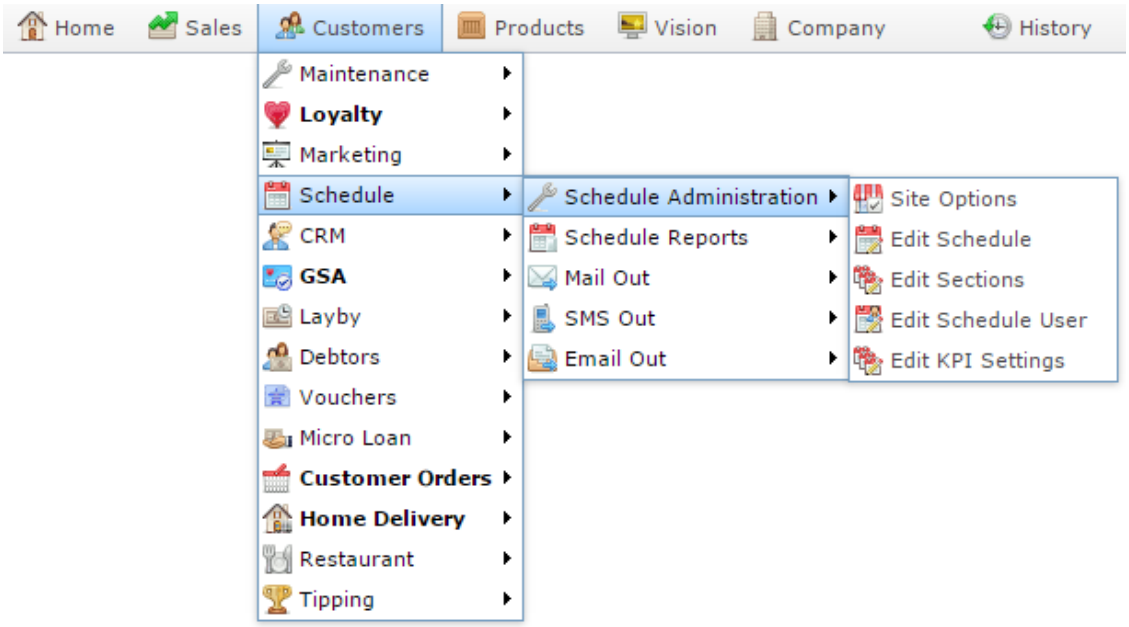
Editing items in a schedule section

Edit the items in a section to change their duration, the number of units of the item offered in the service, or the colour used to display them in the Scheduler.

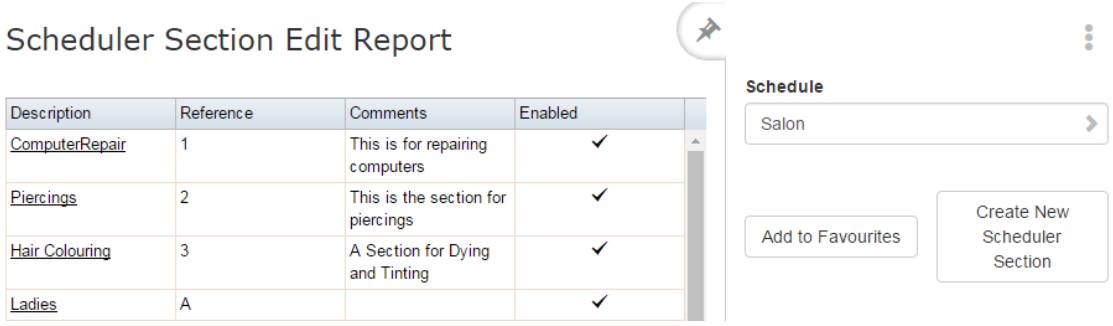
To edit items in a schedule section:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.

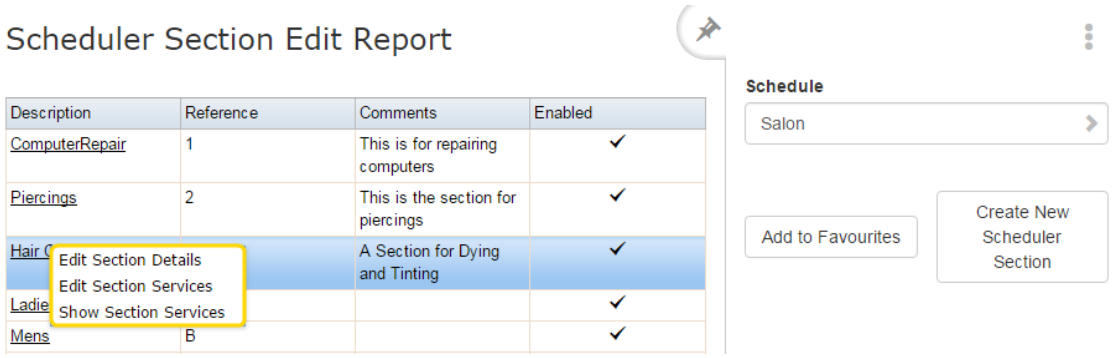


The Scheduler Section Edit report is displayed.



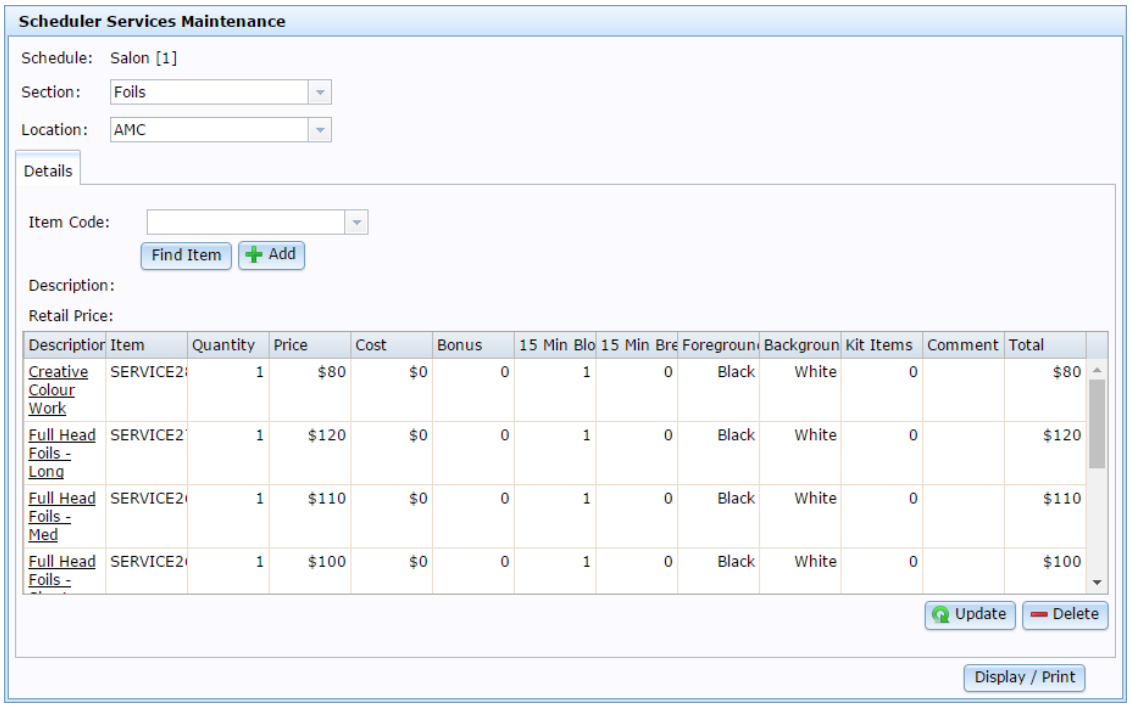
3. Press the Description of the section you want to view.

   A popup is displayed.



4. Press Edit Section Services.

   The Scheduler Services Maintenance screen is displayed.



5. Press the fields you want to edit in the service grid and type a new value.

   See *Scheduler Services Maintenance screen* on page 41.

> **Note:** Not all fields can be edited. If you want to change the item's price or cost, use inventory maintenance. See *Inventory Management - Details tab*.

6. Press

.

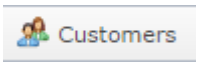
   Your changes are saved.

Removing items from a schedule section

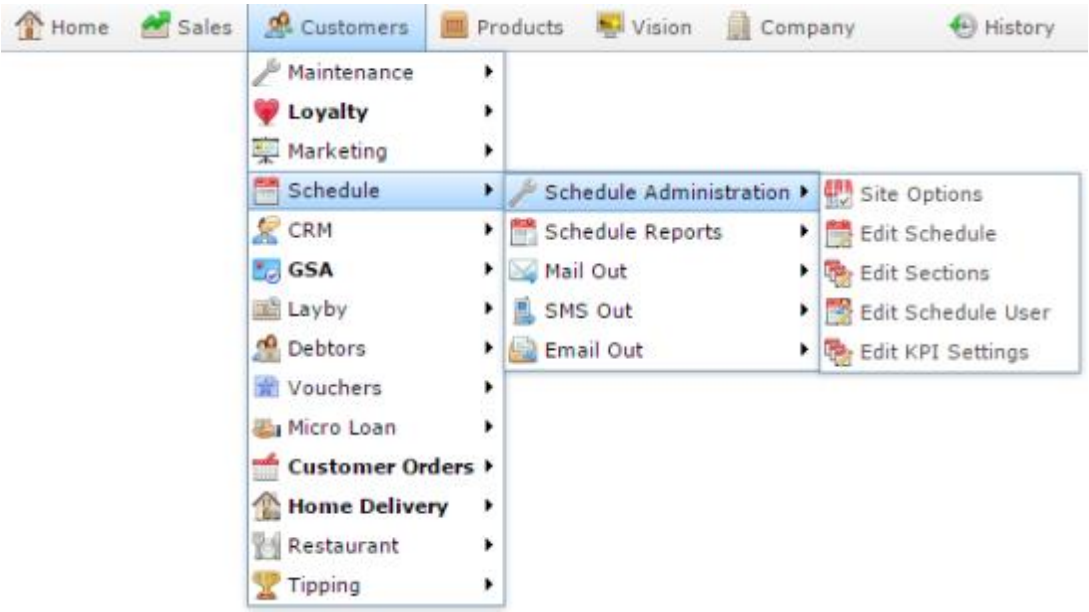
Remove items from a schedule section if you do not want to offer them for appointments.

> **Note:** Items are not removed from existing appointments, but cannot be added to new appointments.

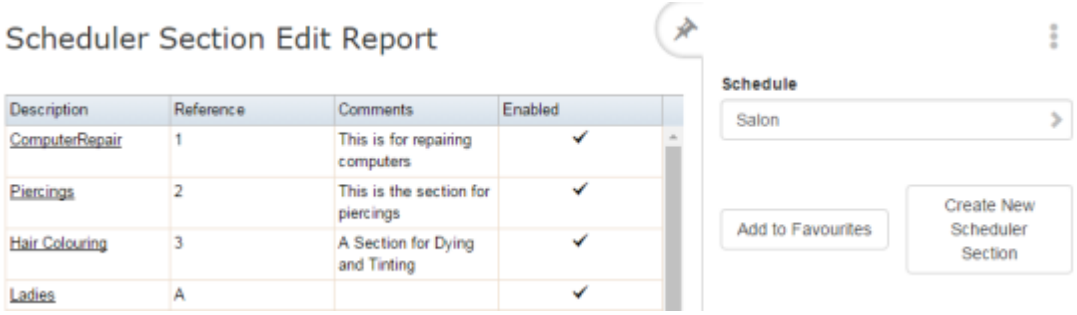
To remove items from a schedule section:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.



The Scheduler Section Edit report is displayed.

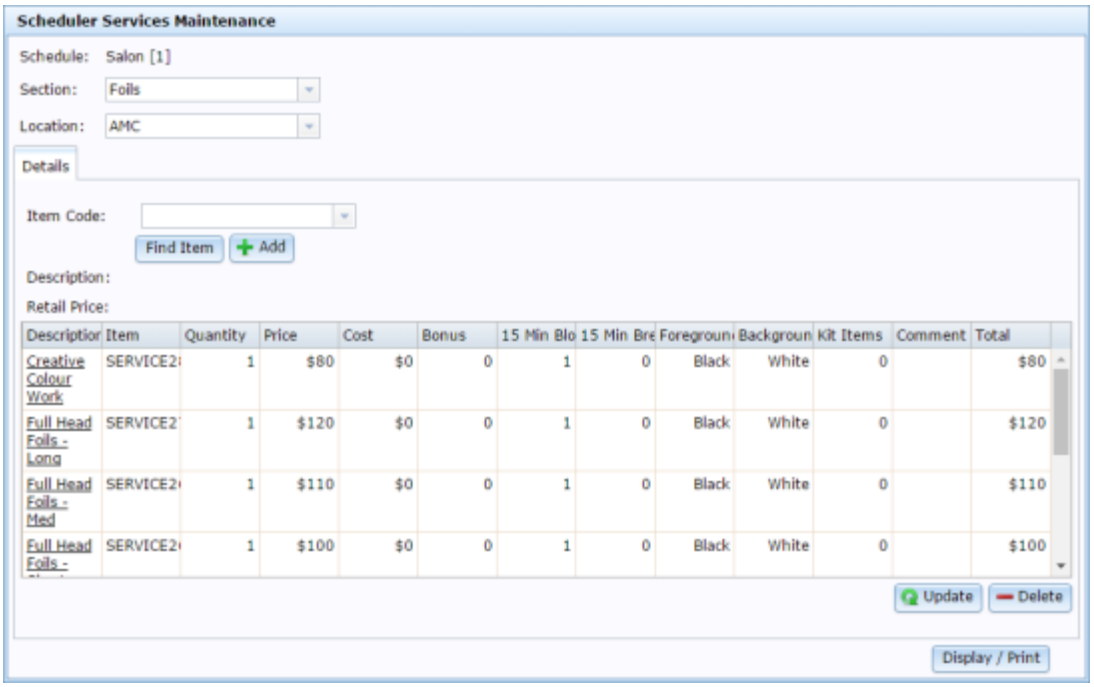


3. Press the Description of the section you want to view.

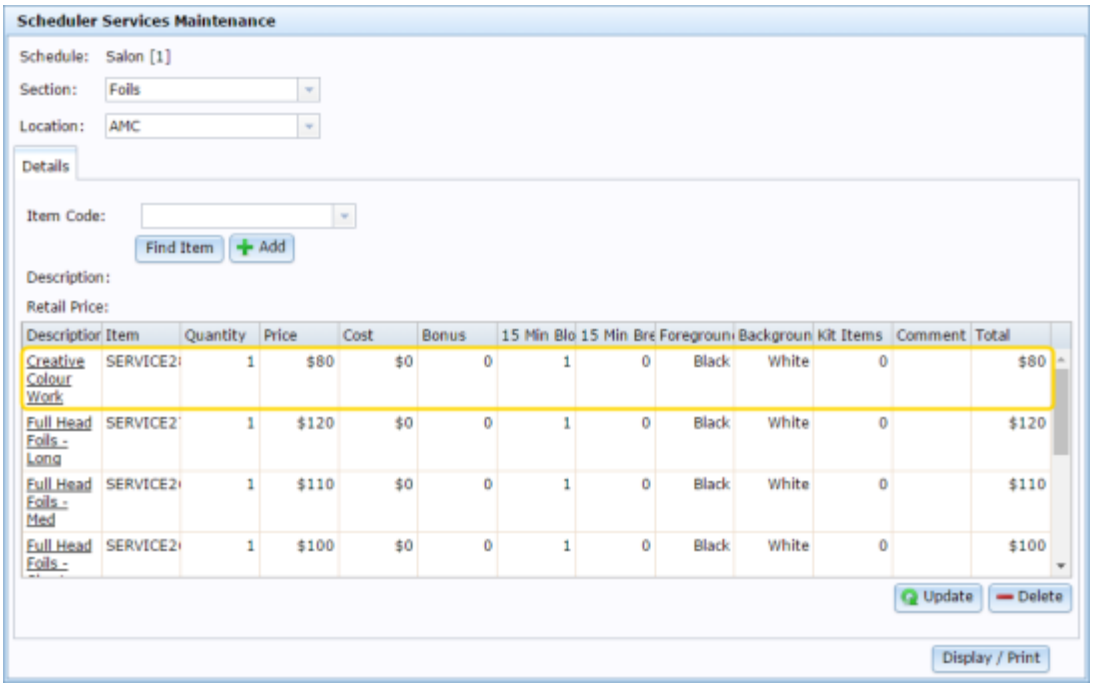
   A popup is displayed.

4. Press Edit Section Services.

   The Scheduler Services Maintenance screen is displayed.



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



6. Press Delete.

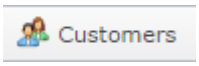
   The item is removed.

Deleting a schedule section

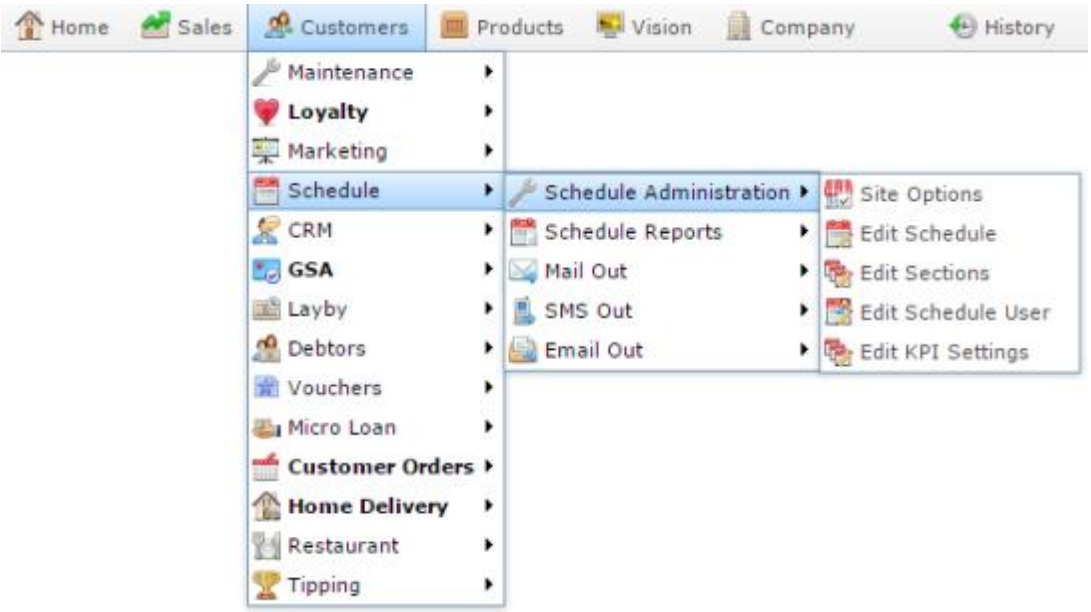
Delete a schedule section to remove it and all its service items from the Scheduler.

> **Note:** Existing appointments are not affected. Items that were linked to this schedule section cannot be added to new appointments.

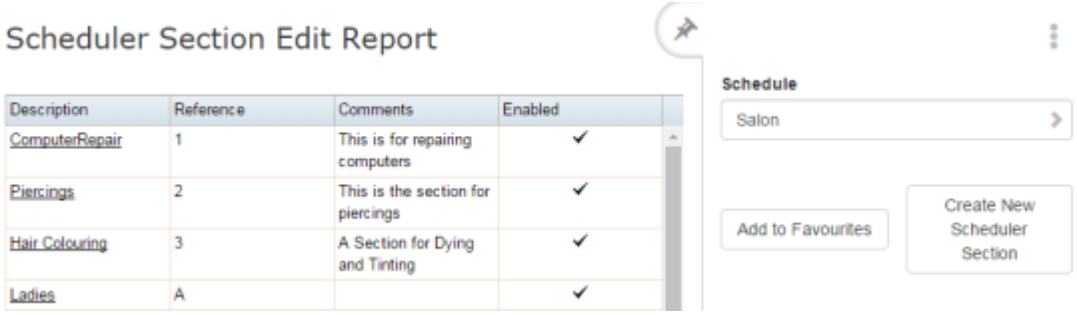
To delete schedule section:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.



The Scheduler Section Edit report is displayed.

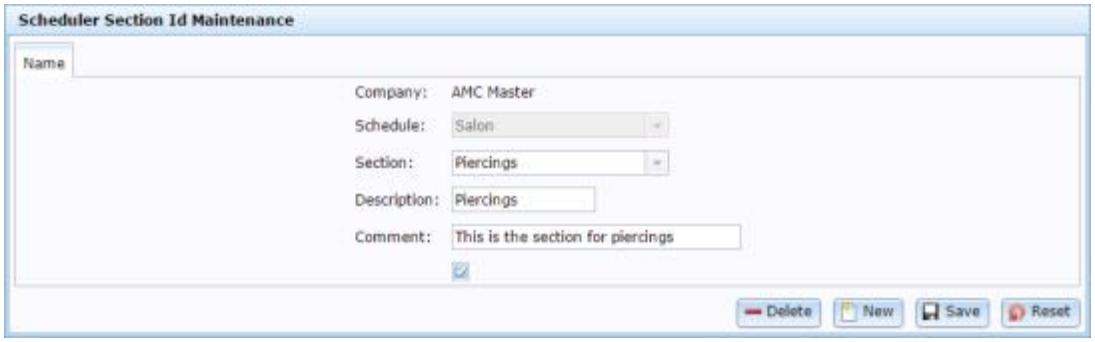


3. Press the Description of the section you want to delete.

   A popup is displayed.

Press Edit Section Details.

The Schedule Section Id Maintenance screen is displayed.



4. Press

.

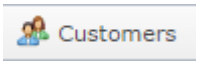
The section is deleted.

Schedule Section Id Maintenance screen

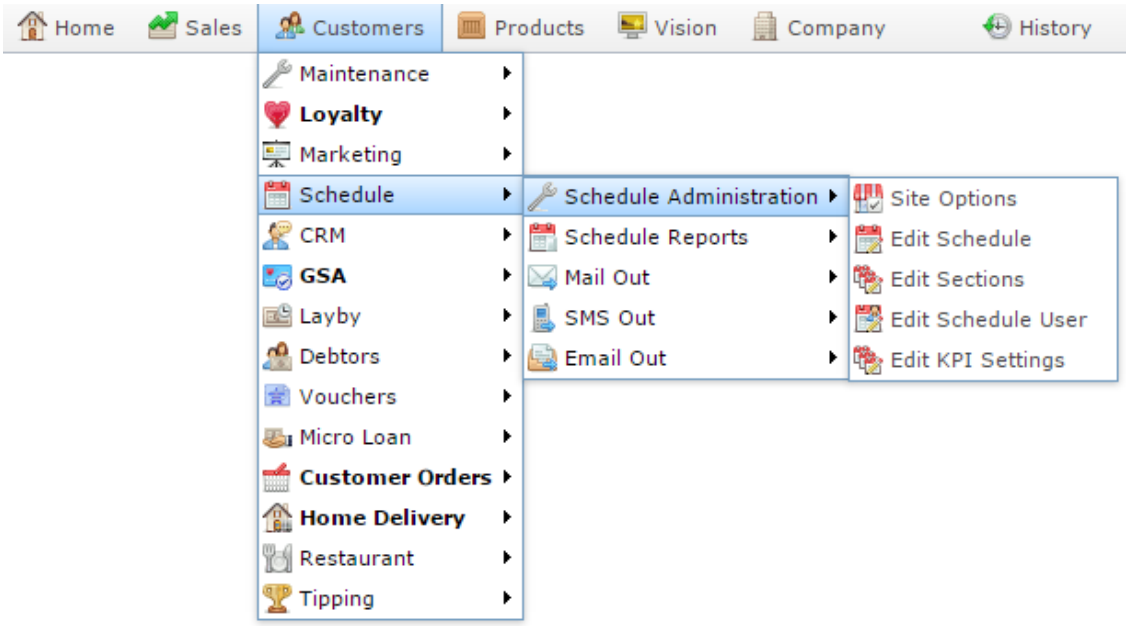
Use this screen to create and edit sections that group similar types of services together within a schedule reference. For example, hair styling, hair cuts and hair dying in a hair schedule.

Opening the Schedule Section Id Maintenance screen

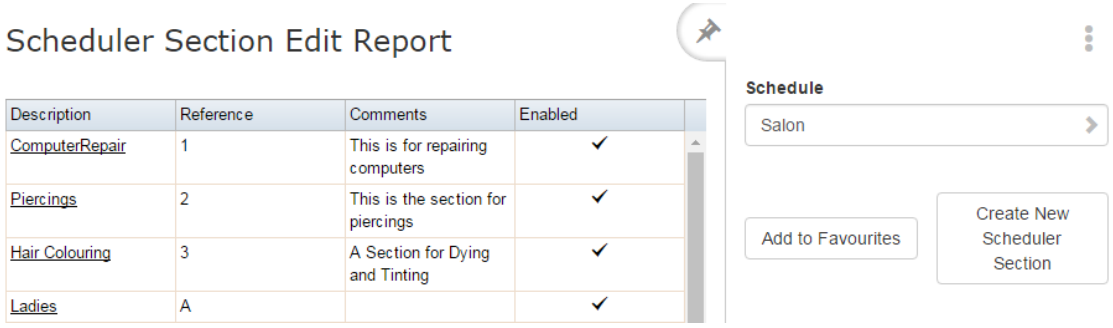
To open the Schedule Section Id Maintenance screen:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.

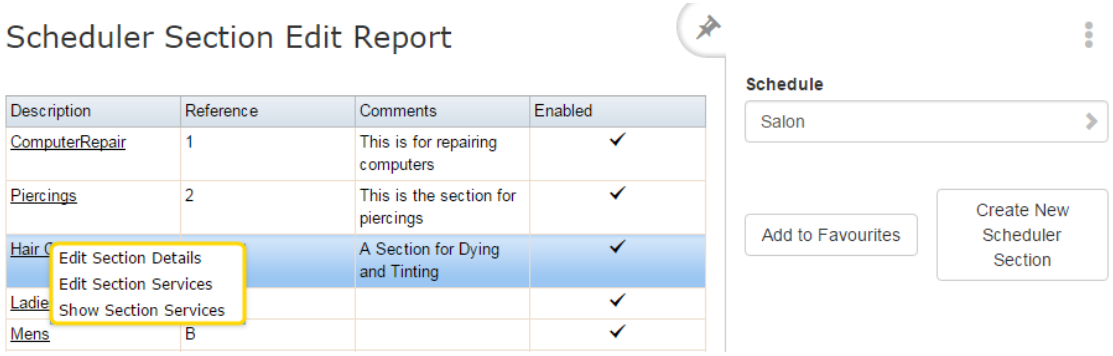


The Scheduler Section Edit report is displayed.



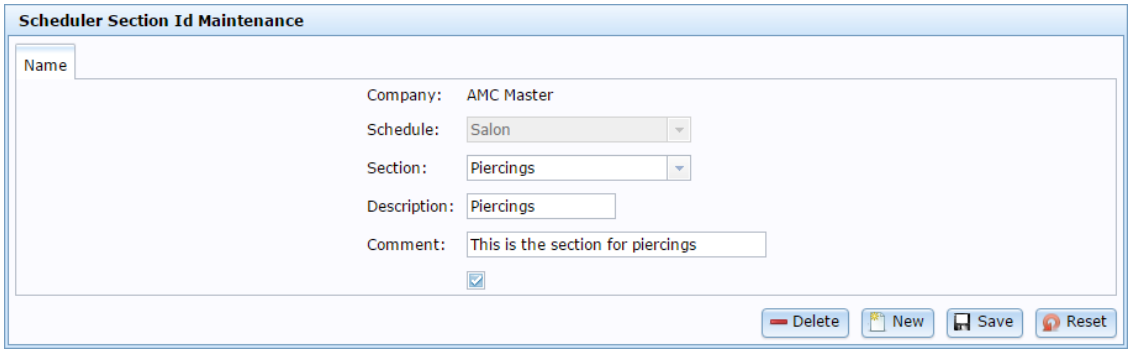
3. Press the Description of the section you want to view.

   A popup is displayed.



Press Edit Section Details.

The Schedule Section Id Maintenance screen is displayed.



Schedule Section Id Maintenance screen key fields and buttons

Field	Description
Company	The company the schedule configuration relates to.
Schedule	The schedule reference that this section belongs to. See *Schedule Id Maintenance screen* on page 16.
Section	Unique name identifying the section.
Description	Description of the section that appears in the Scheduler.

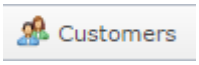
Field	Description
Comment	Comment describing the section.
Delete	Press to delete this section. **Note:** Existing appointments are not affected, but items linked to this section cannot be added to new appointments.
New	Press to create a new section.
Save	Press to save any changes to this section.
Reset	Press to undo any changes to this section since you last saved it.

Schedule Section Edit report

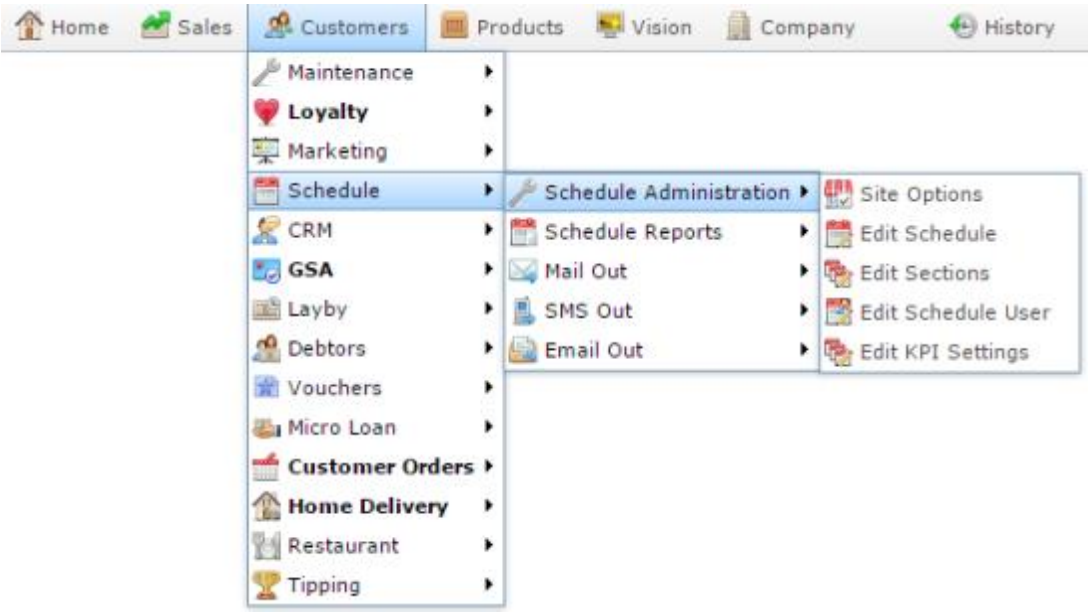
Use the Schedule Section Edit report to view and edit scheduler sections.

Opening the Schedule Section Edit report

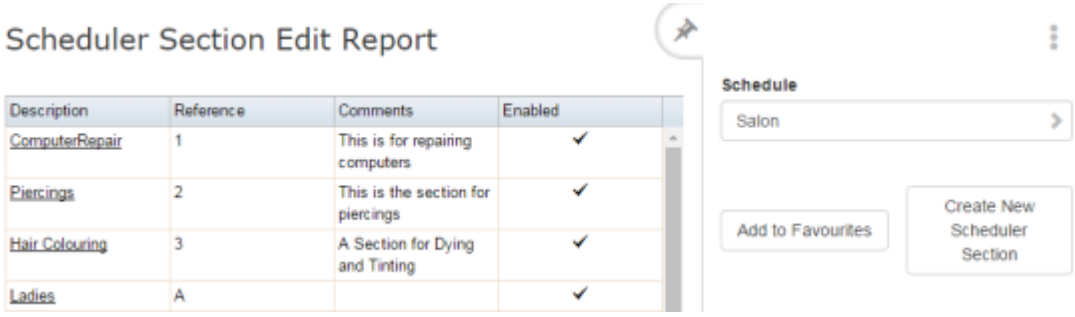
To open the Schedule Section Edit report:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Administration > Edit Sections.



The Schedule Section Edit report is displayed.



Schedule Section Edit report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Create New Scheduler Section	Press to create a new schedule section.
Schedule / **Type /** **Select**	Select the schedule reference to report on.

Report area

This area displays report information.

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

Field	Description
Description	Description of the schedule section.
Reference	Schedule reference the section belongs to.

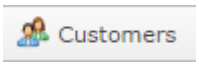
Field	Description
Comments	Comment on the section.
Enabled	Whether the section is available to the Scheduler.

Scheduler Services Maintenance screen

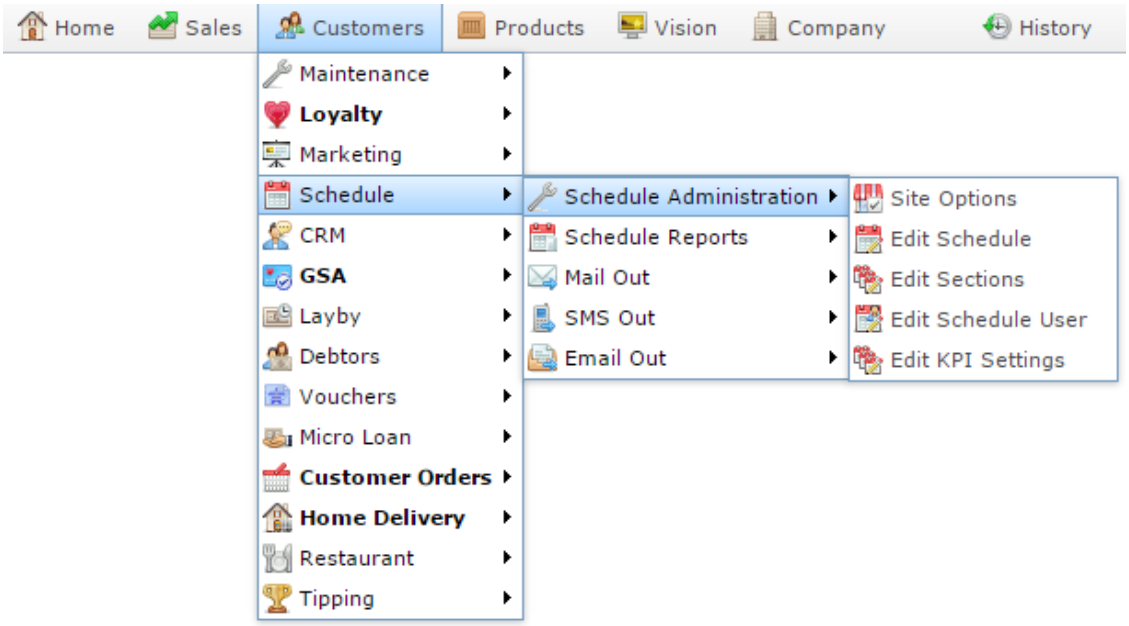
Use this screen to add services items to schedule sections, so they can be booked in as appointments in the Scheduler.

Opening the Scheduler Services Maintenance screen

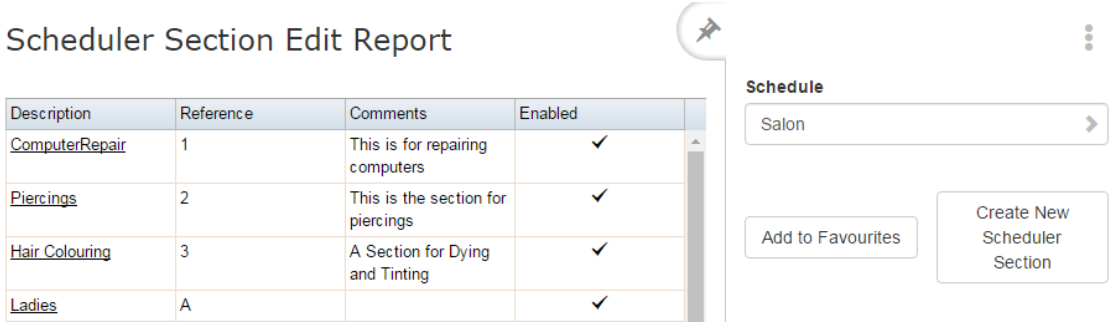
To open the Scheduler Services Maintenance screen:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule.

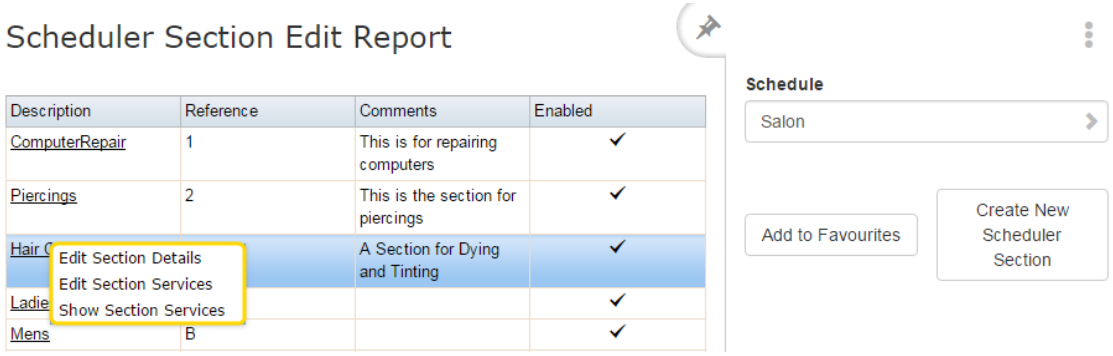


The Scheduler Section Edit report is displayed.



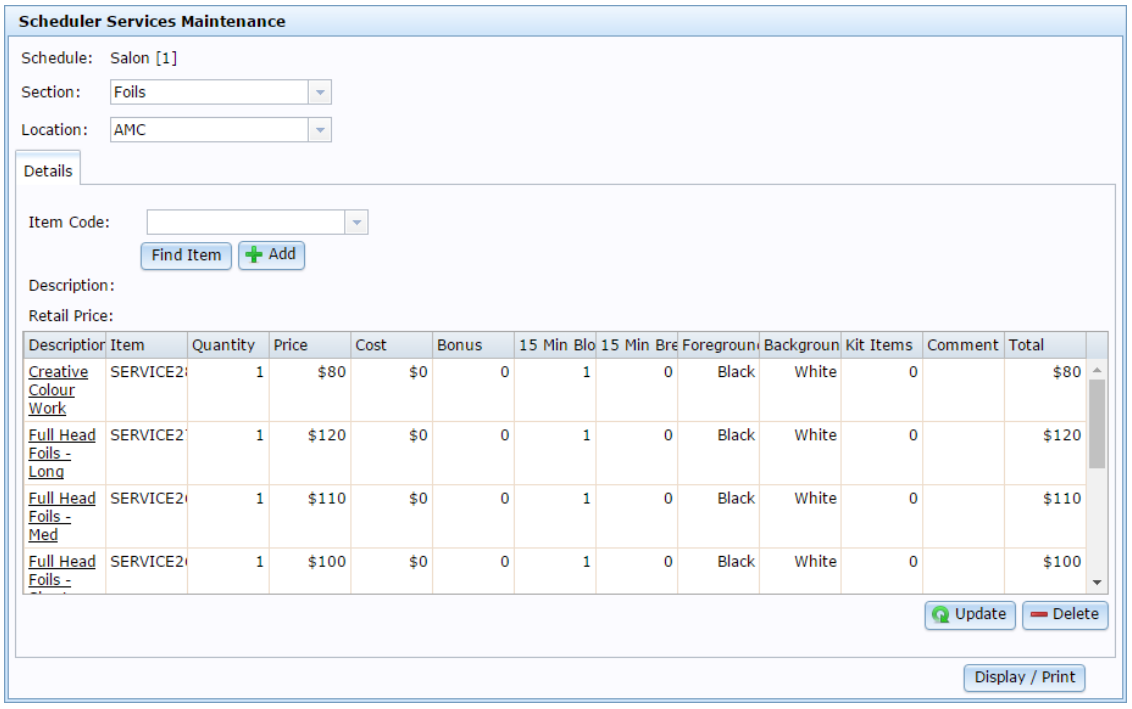
3. Press the Description of the section you want to view.

   A popup is displayed.



4. Press Edit Section Services.

   The Scheduler Services Maintenance screen is displayed.



Scheduler Services Maintenance screen key fields and buttons

Field	Description
Schedule	The schedule reference this section relates to.
Section	The section being edited.

Field	Description
Location	The location the section refers to.
Item Code	Search for an item code to add a service to the section. See *Finding an item with a search field*.
Description	Description of the selected service item.
Retail Price	Retail price of the selected service item.
Update	Save any changes made to the service grid.
Delete	Delete the selected service item from the service grid.
Display / Print	Display the Scheduler Services report. See *Scheduler Services report* on page 46.

Service grid

Field	Description
Description	Description of the service item. **Note:** Press to open inventory maintenance for this service item. See *Inventory Management - Details tab*.
Item	Item code of the service item.
Quantity	Number of units of this item included. For example, some services may be sold in pairs or sets.
Price	Price of one unit of this service item.
Cost	Cost of one unit of this service item.
Bonus	Bonus loyalty points offered for this item. **Note:** This is a read-only field. To edit bonus loyalty points, see *Creating a frequent shopper item*.
15 Min Blocks	Number of 15 minute blocks this service item takes to perform. **Note:** Partial blocks should be counted as whole blocks. For example, if a service takes 35 minutes, add it as **3** blocks.
15 Min Breaks	Number of 15 minute breaks included in this service item.

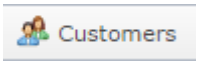
Field	Description
Foreground	Colour of the text of this item in the Scheduler.
Background	Colour of the background of this item in the Scheduler.
Kit Items	Number of units of items included in the kit, if the service item is a kit item. See *Managing referrals and kits*.
Comment	Any comment on this service item.
Total	Total cost of this service item.

Scheduler Services report

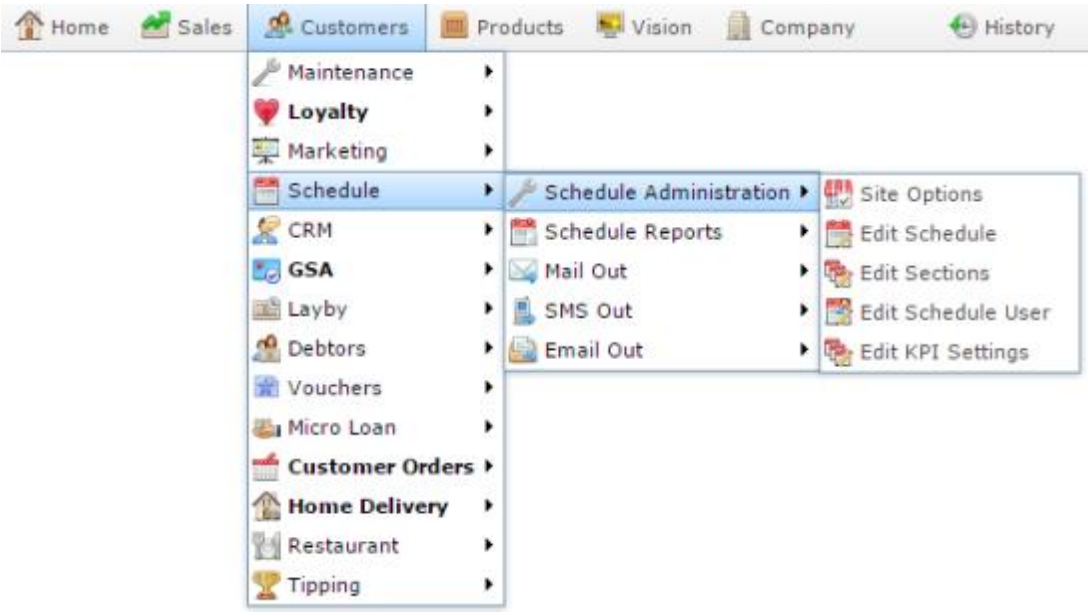
Use the Scheduler Services report to view the services available per section.

Opening the Scheduler Services report

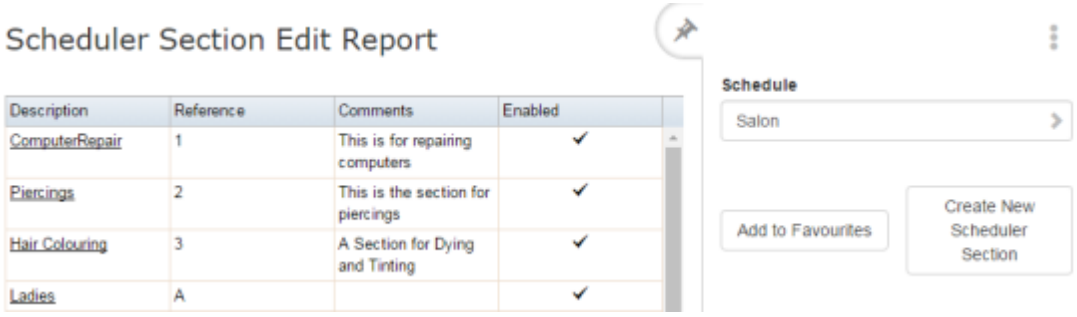
To open the Scheduler Services report:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Administration > Edit Sections.



The Scheduler Section Edit report is displayed.

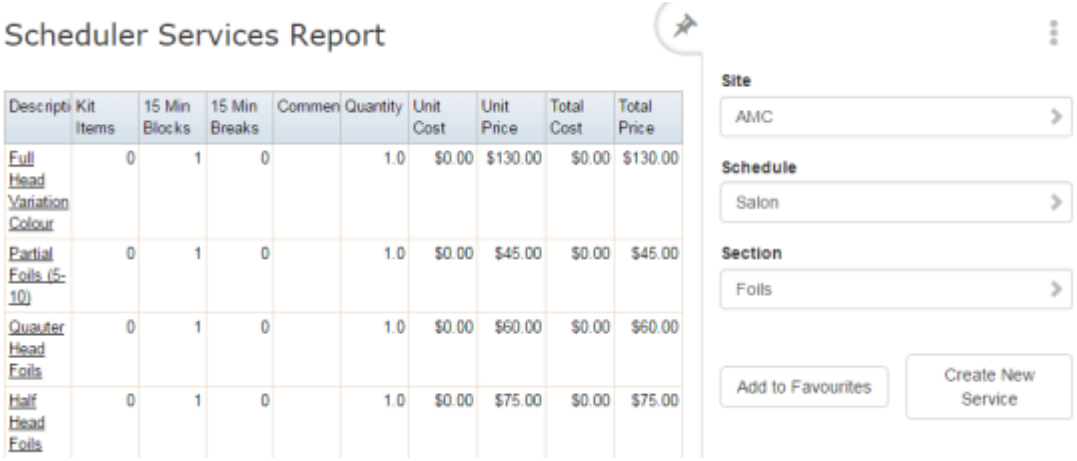


3. Press the Description of the section you want to view.

   A popup menu is displayed.

4. Press Show Section Services.

   The Scheduler Services Report is displayed.



Scheduler Services report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Create New Service	Press to create a new service.
Schedule / **Type /** **Select**	Select the schedule reference to report on.
Section	Select the schedule section to report on.

Report area

This area displays report information.

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

Field	Description

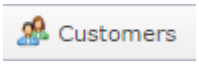
Field	Description
Description	Description of the service item.
Kit Items	Number of kit items included in this service item.
15 Min Blocks	Number of 15 minute blocks this service item requires.
15 Min Breaks	Number of 15 minute breaks this service item includes.
Comment	Comment on this service item.
Quantity	Number of units of this item included in the service.
Unit Cost	Cost of this item per unit.
Unit Price	Retail price of this item per unit.
Total Cost	Total cost for all included units of this item.
Total Price	Total retail price for all included units of this item.

Editing an appointment

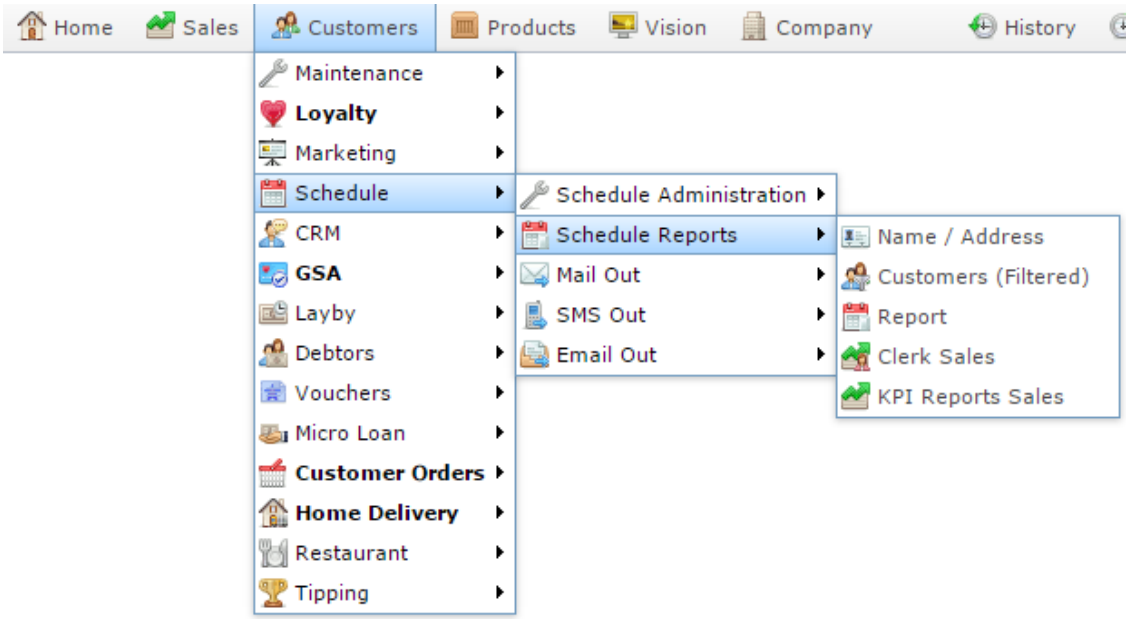
Edit an appointment to change the customer's address or contact details, add instructions, or change the duration of some service items.

Note: You cannot add or remove services to an appointment via the Portal.

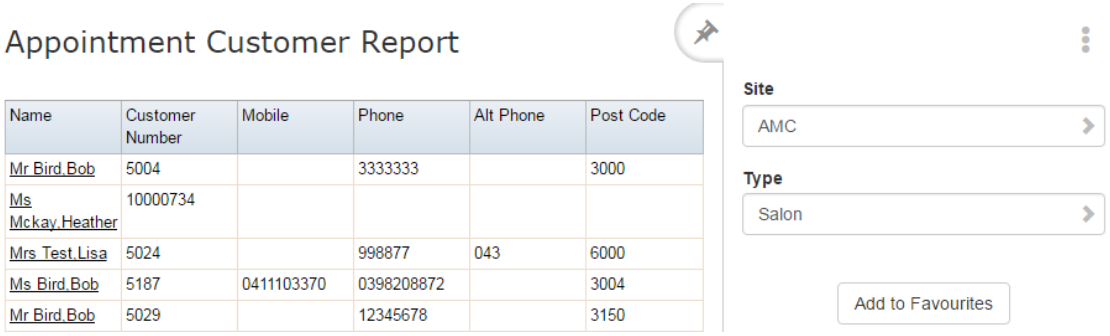
To edit an appointment:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Reports > Name / Address.



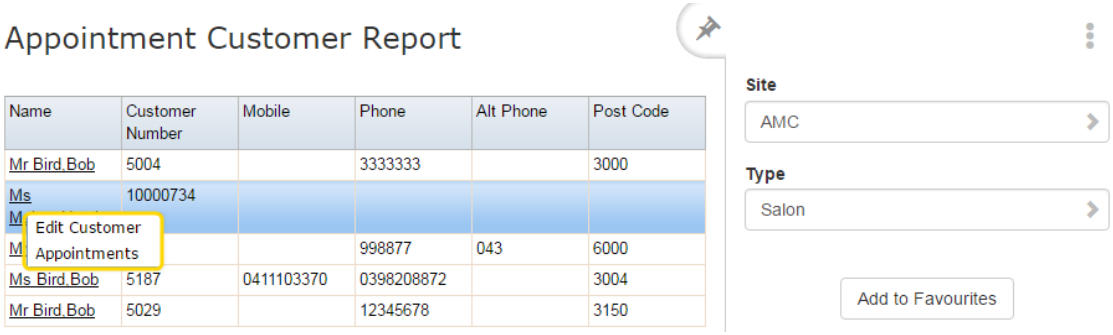
The Appointment Customer report is displayed.



Name	Customer Number	Mobile	Phone	Alt Phone	Post Code
Mr Bird,Bob	5004		3333333		3000
Ms Mckay,Heather	10000734				
Mrs Test,Lisa	5024		998877	043	6000
Ms Bird,Bob	5187	0411103370	0398208872		3004
Mr Bird,Bob	5029		12345678		3150

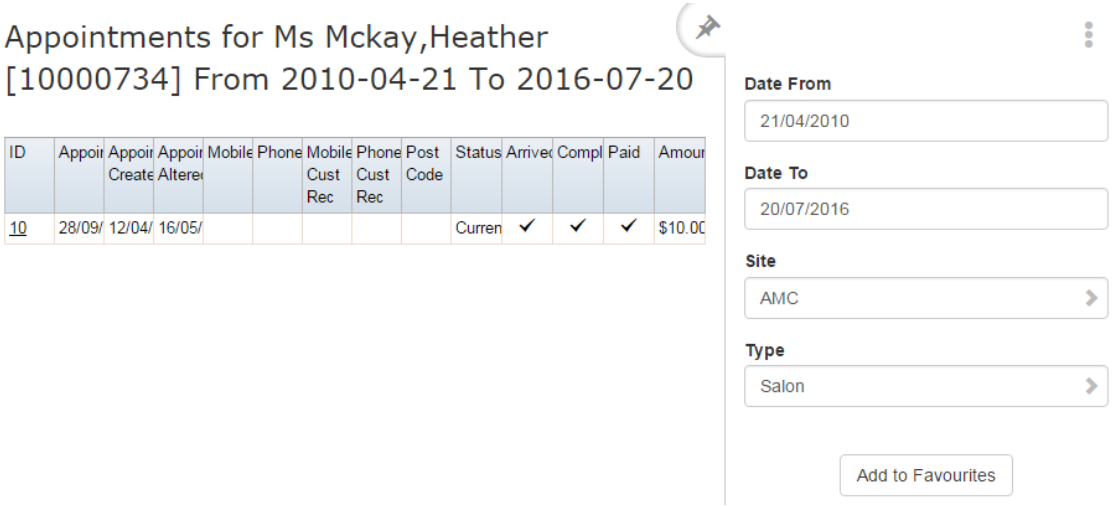
3. Press the Name of the customer whose appointments you want to view.

   A popup menu is displayed.



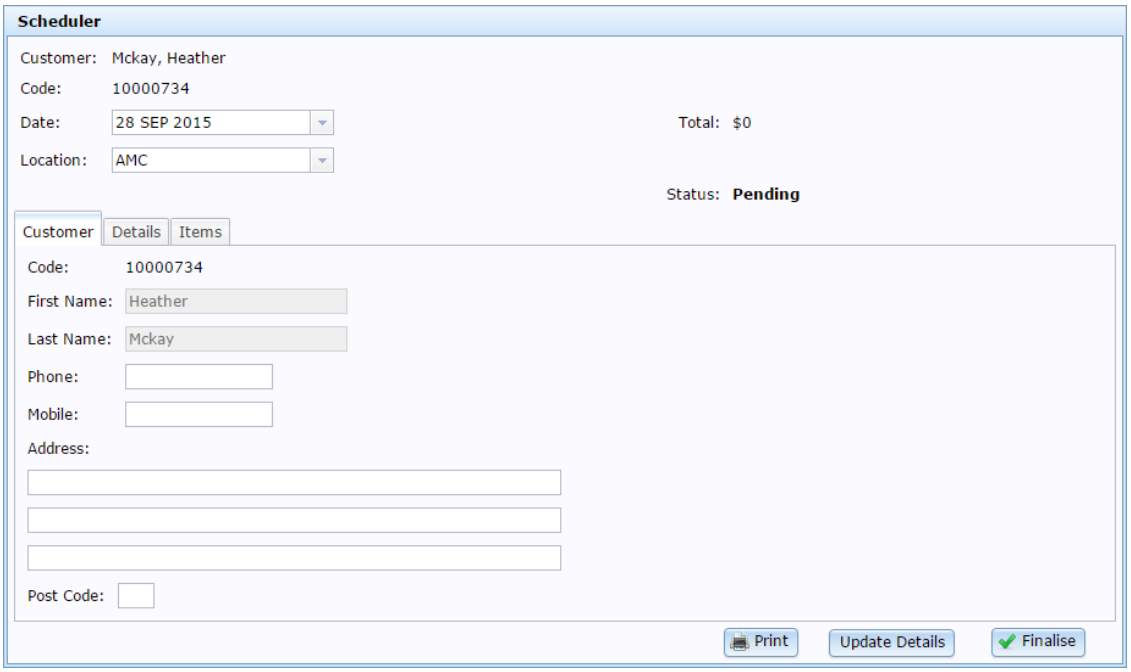
4. Press Appointments.

   The Appointments For Customer report is displayed.



5. Press the ID of the appointment you want to view the details of.

   The Scheduler Maintenance screen is displayed.



6. Make the required changes.

   See *Scheduler Maintenance screen* on page 58.

7. Press Update Details.

   The appointment is saved.

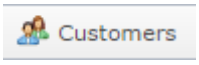
Scheduler report

Use the Scheduler report to view the scheduled appointments for the day and view an appointment's details.

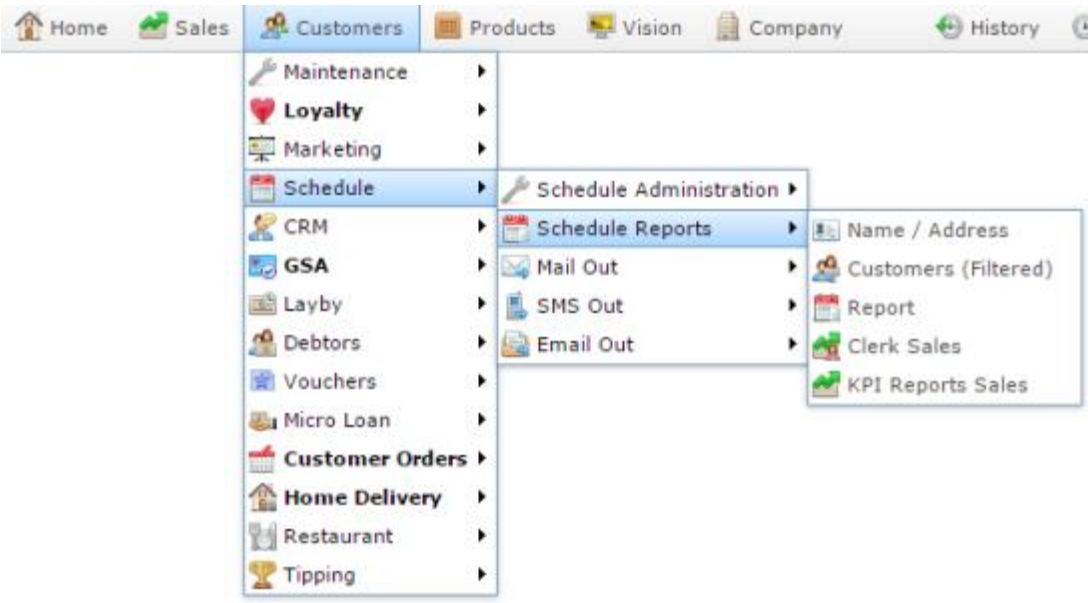
Note: You cannot create new appointments via the Portal.

Opening the Scheduler report

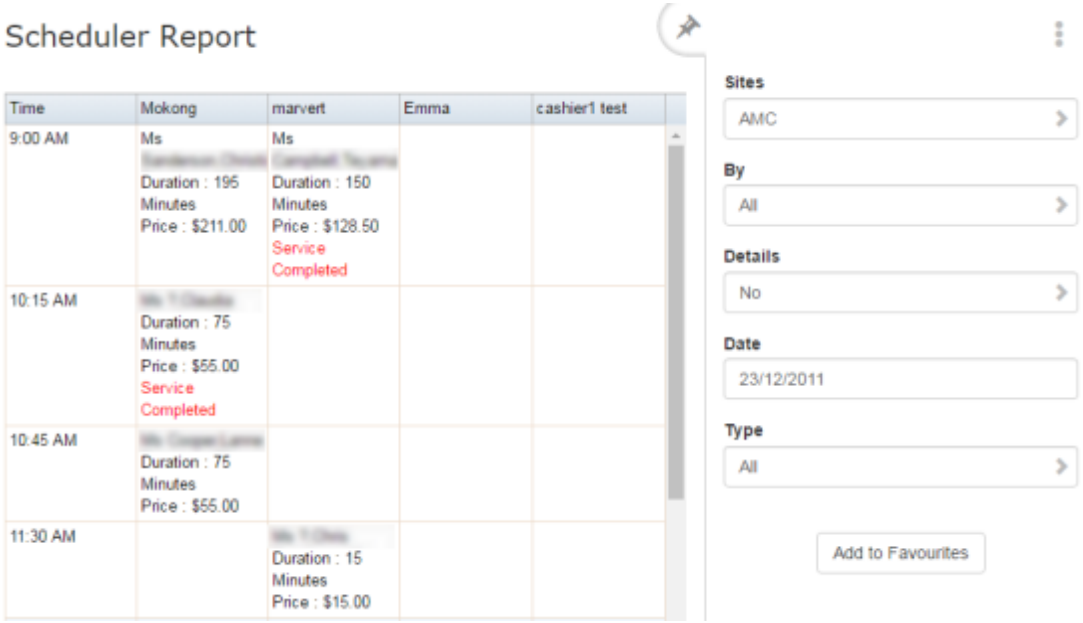
To open the Scheduler report:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Reports > Report.



The Scheduler report is displayed.


Scheduler Report
Time
Mokong
marvert
Emma
cashier1 test
9:00 AM
Ms
Duration : 195 Minutes
Price : $211.00
Ms
Duration : 150 Minutes
Price : $128.50
Service Completed
10:15 AM
Duration : 75 Minutes
Price : $55.00
Service Completed
10:45 AM
Duration : 75 Minutes
Price : $55.00
11:30 AM
Duration : 15 Minutes
Price : $15.00
Sites
AMC
By
All
Details
No
Date
23/12/2011
Type
All
Add to Favourites

Scheduler report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.
Option / **Summary /** **Details**	Select to view a full report, or summary details.
Schedule / **Type /** **Select**	Select the schedule reference to report on.

Field	Description
By	Select to show appointments by their status: ▪ Pending. ▪ Arrived. ▪ Completed. ▪ Paid. ▪ All.

Report area

This area displays report information.

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

Field	Description
Time	Time slot.
Username	Appointments for this user during this time slot.

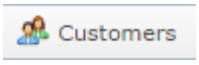
Scheduler Maintenance screen

Use this screen to make minor edits to a scheduler appointment.

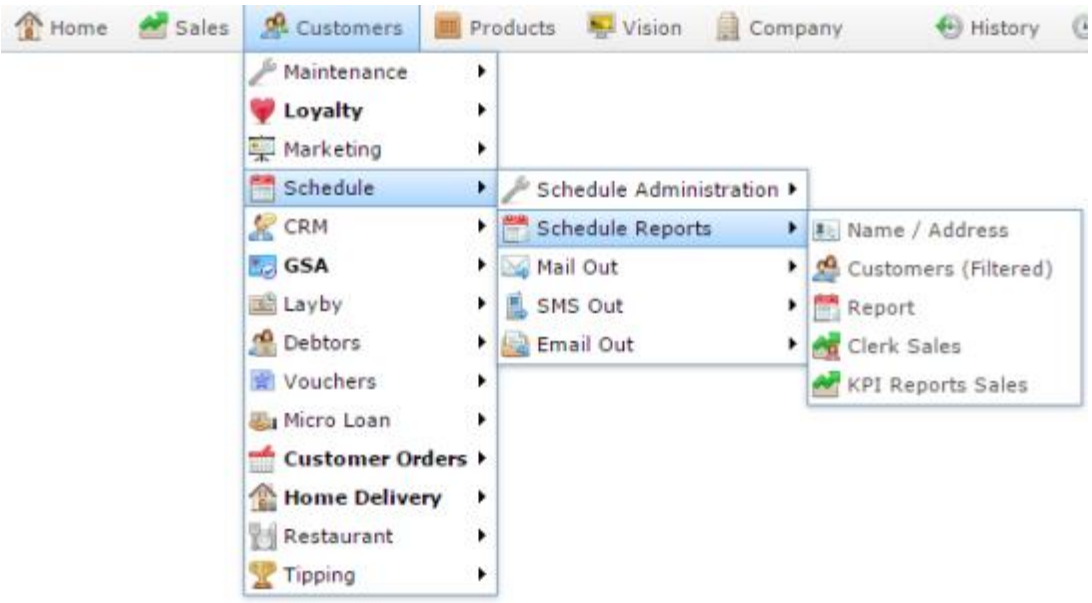
> **Note:** You cannot create or delete appointments, or add or remove items from appointments via the Portal. You must use the Scheduler.

Opening the Scheduler Maintenance screen

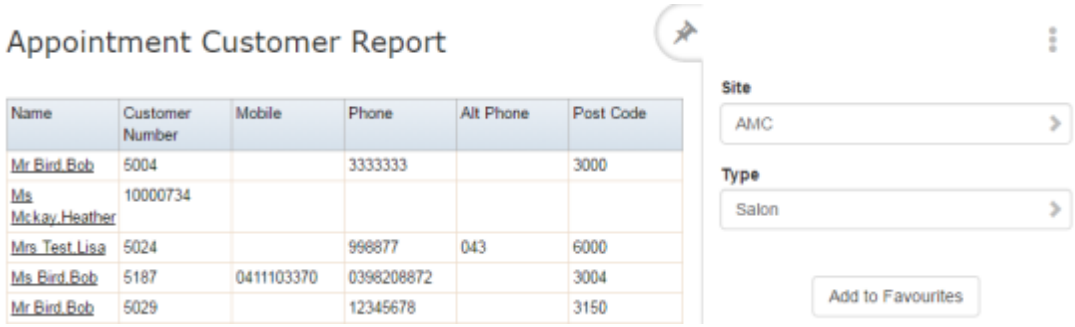
To open the Scheduler Maintenance screen:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Reports > Name / Address.



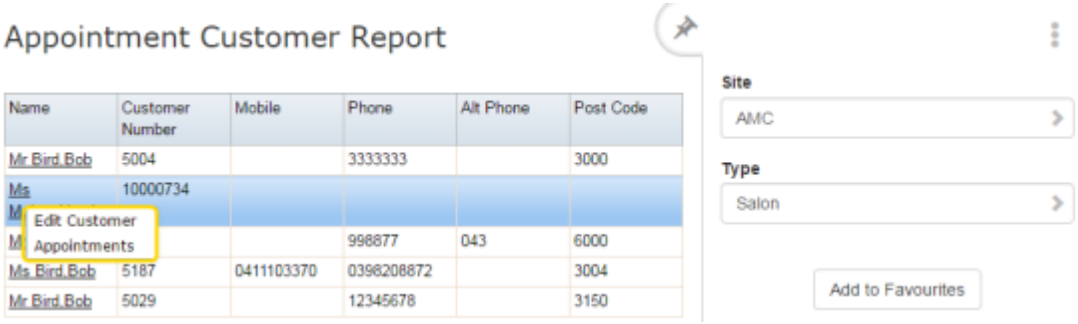
The Appointment Customer report is displayed.



Name	Customer Number	Mobile	Phone	Alt Phone	Post Code
Mr Bird Bob	5004		3333333		3000
Ms Mckay Heather	10000734				
Mrs Test Lisa	5024		998877	043	6000
Ms Bird Bob	5187	0411103370	0398208872		3004
Mr Bird Bob	5029		12345678		3150

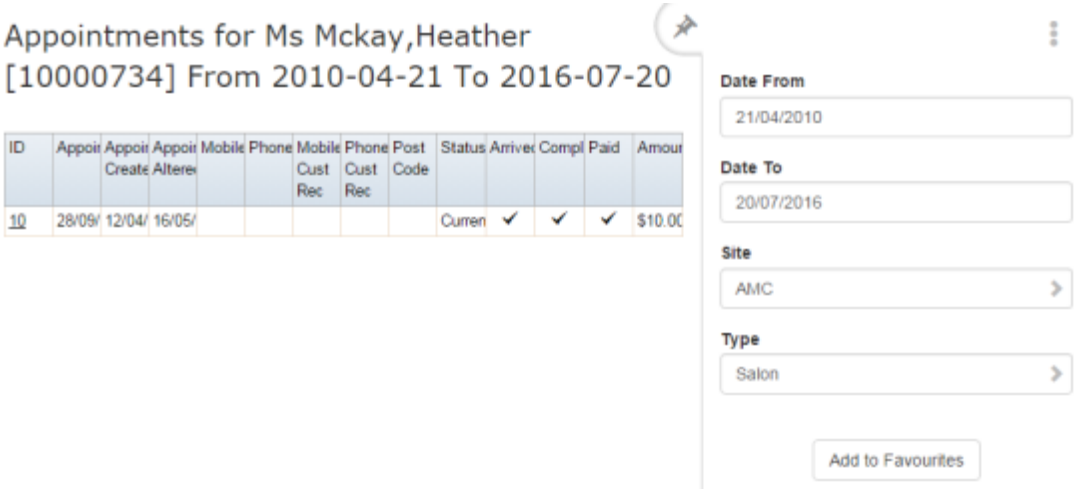
3. Press the Name of the customer whose appointments you want to view.

   A popup menu is displayed.



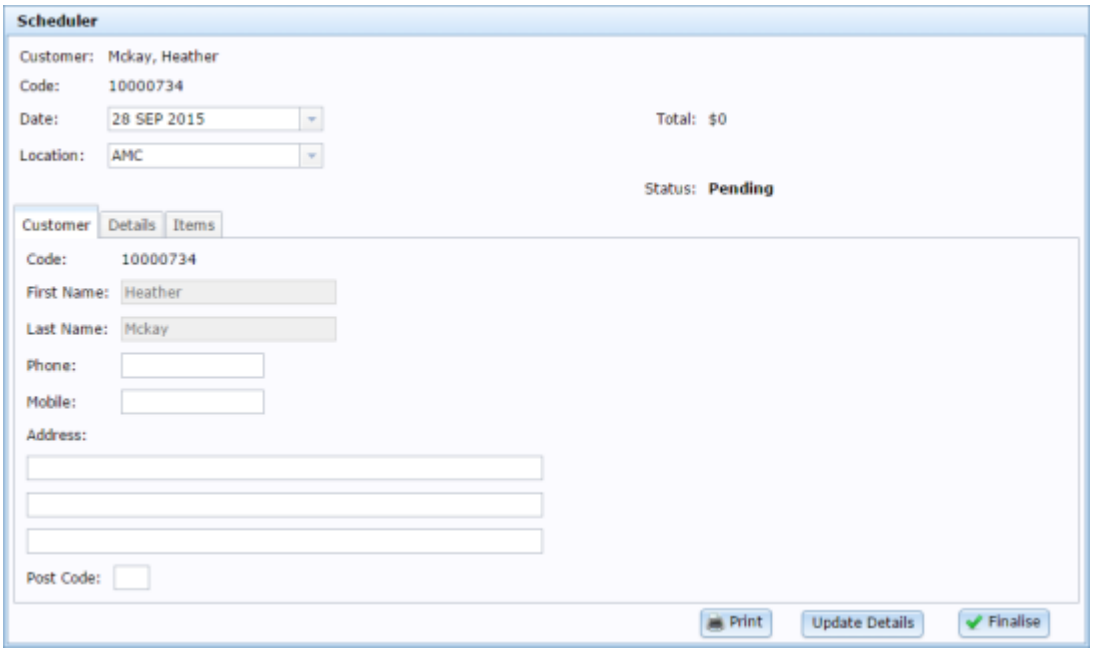
4. Press Appointments.

   The Appointments For Customer report is displayed.



5. Press the ID of the appointment you want to view the details of.

   The Scheduler Maintenance screen is displayed.



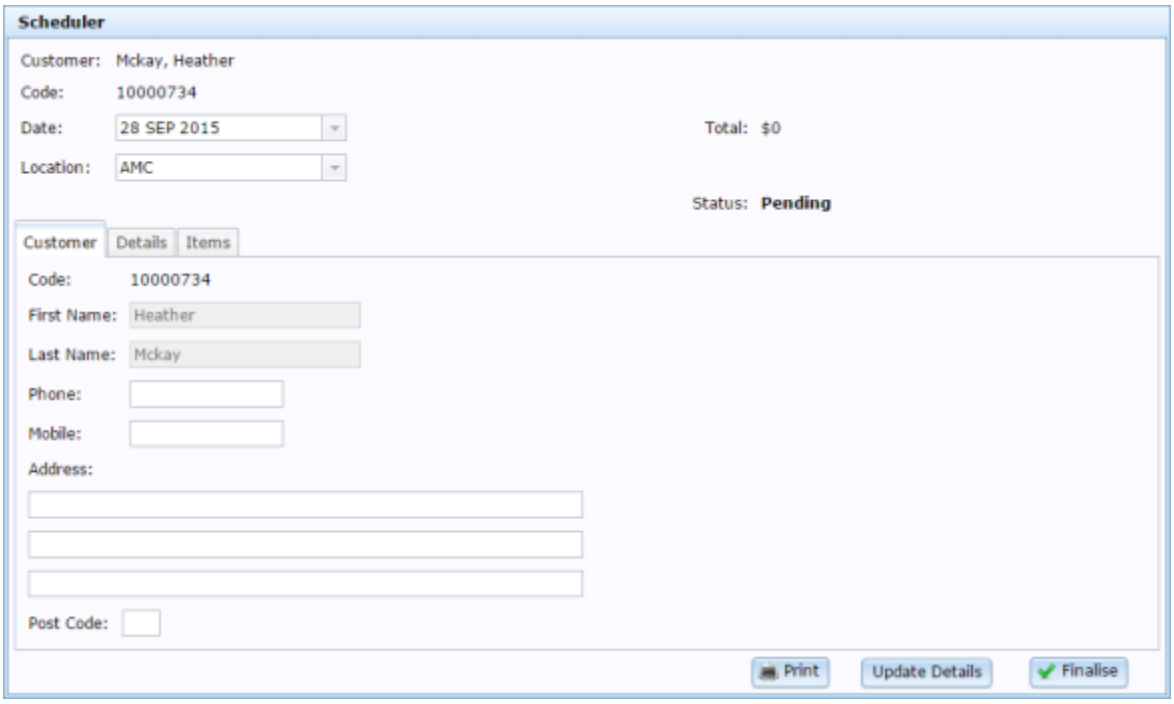
Scheduler Maintenance screen key fields and buttons

Common fields and buttons

Field	Description
Customer	The customer's name.
Code	Unique code identifying the customer.
Date	Date of the appointment.
Location	The site the appointment is scheduled at.
Total	The total amount due for the appointment.
Status	Current status of the appointment.
Print	Press to print the appointment details.
Update Details	Press to save any changes you have made to the appointment.
Finalise	Press to finalise the appointment.

Customer tab

Use this area to view or edit the customer's contact details.

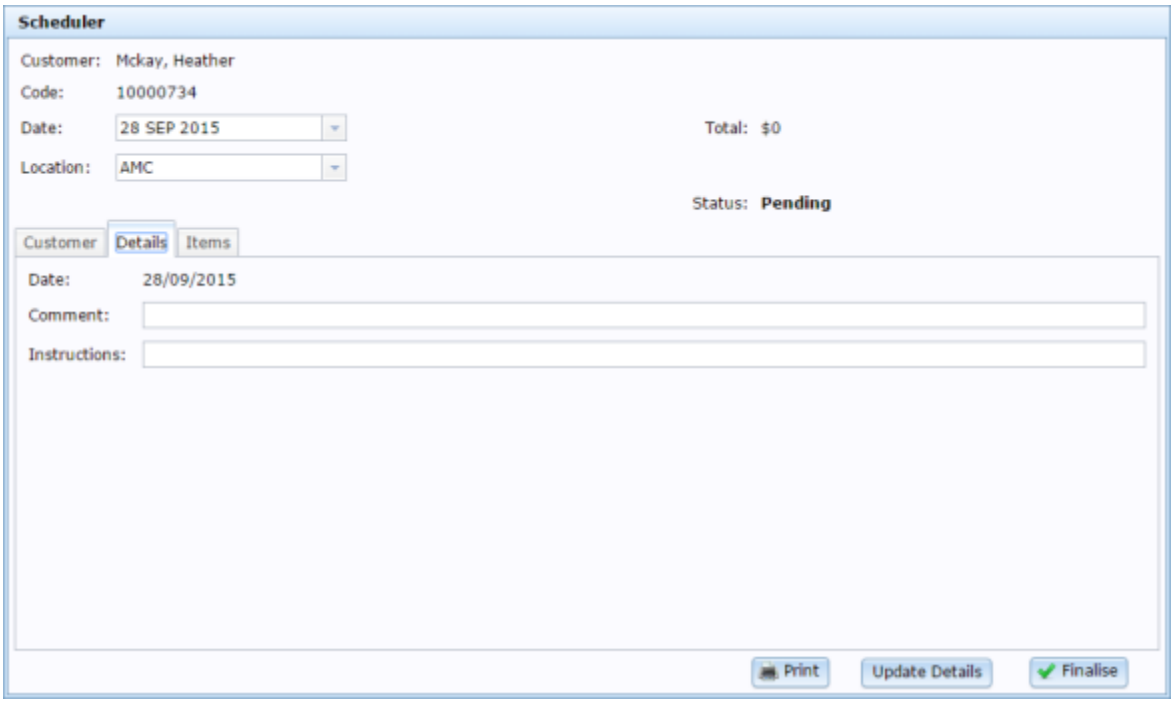


Field	Description
Code	Unique code identifying the customer.
First Name	Customer's first name.
Last Name	Customer's last name.
Phone	Customer's landline phone number.
Mobile	Customer's mobile number.
Address	Customer's address.

Field	Description
Post Code	Customer's post code.

Details tab

Use this area to add any comments or instructions for the appointment.

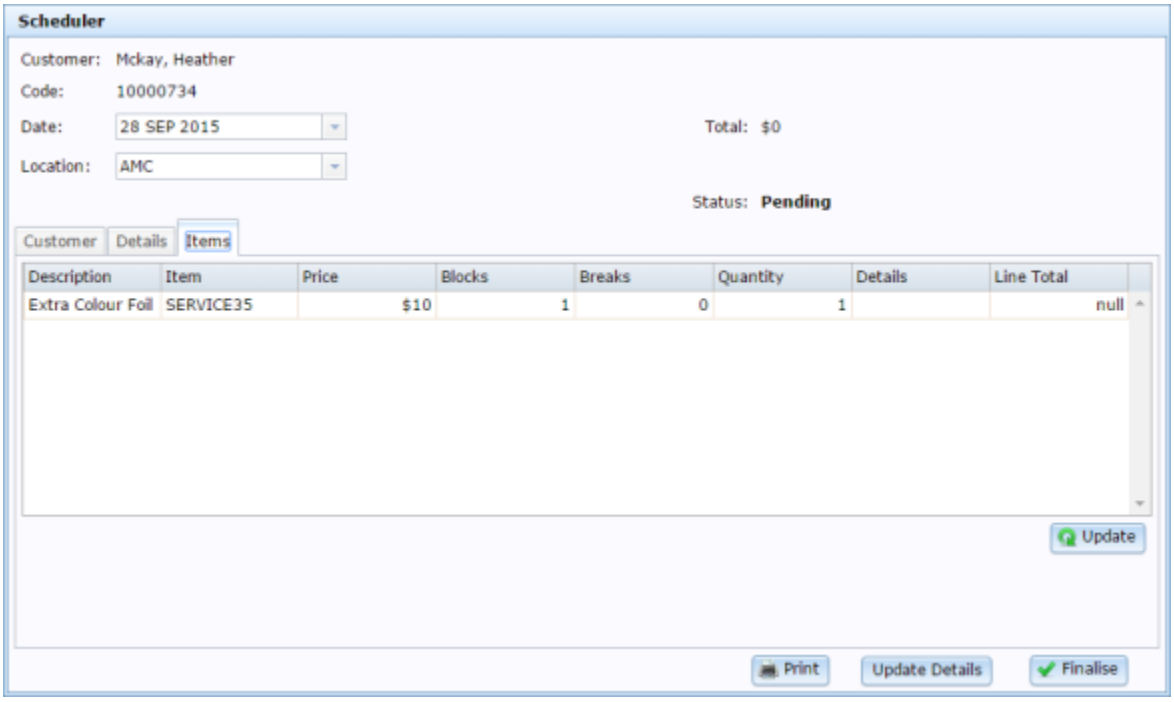


Field	Description
Date	Date of the appointment.
Comment	Any comment on the appointment.
Instructions	Any special instructions from the customer.

Items tab

Use this area to view and edit the service items provided during the appointment.

Note: You cannot add or remove services from the appointment via the Portal.



Field	Description
Description	Description of the service item.
Item	Unique code identifying the service item.
Price	Price of the service item.
Blocks	Number of 15-minute blocks this service requires.
Breaks	Number of 15-minute breaks this service includes.

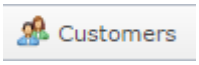
Field	Description
Quantity	Number of units of this service item ordered.
Details	Details of this service item.
Line Total	Total amount of this service item.

Scheduler KPI Setup Editor screen

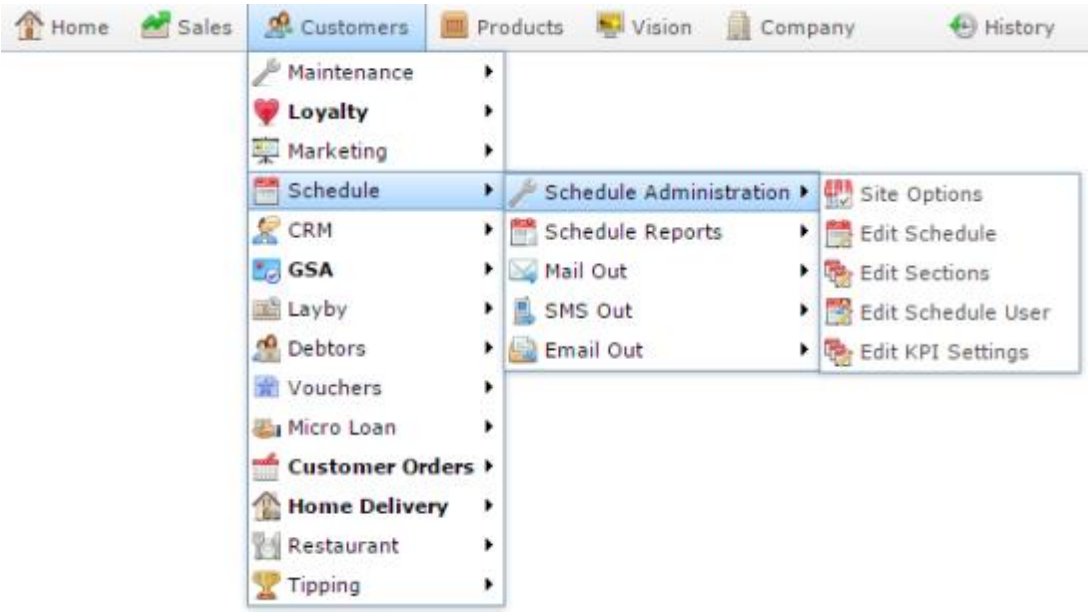
Use this screen to set up reports for your KPIs (key performance indicators).

Opening the Scheduler KPI Setup Editor screen

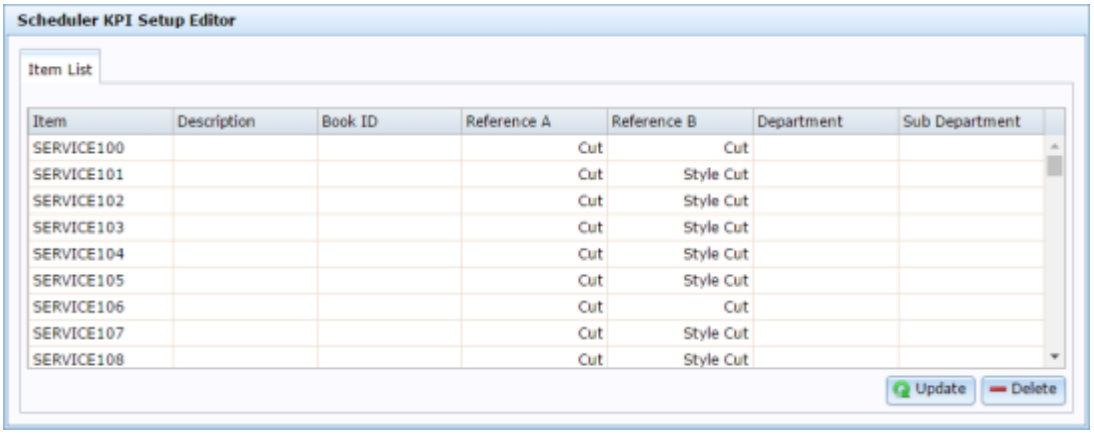
To open the Scheduler KPI Setup Editor screen:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Administration > Edit KPI Settings.



The Scheduler KPI Setup Editor screen is displayed.



Item	Description	Book ID	Reference A	Reference B	Department	Sub Department
SERVICE100			Cut	Cut		
SERVICE101			Cut	Style Cut		
SERVICE102			Cut	Style Cut		
SERVICE103			Cut	Style Cut		
SERVICE104			Cut	Style Cut		
SERVICE105			Cut	Style Cut		
SERVICE106			Cut	Cut		
SERVICE107			Cut	Style Cut		
SERVICE108			Cut	Style Cut		

Scheduler KPI Setup Editor screen key fields and buttons

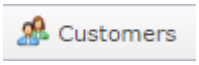
Field	Description
Item	The item number referring to the service.
Description	Description of the service item.
Book ID	Unique code identifying the appointment book within the Scheduler. For example, appointments for the tanning salon, for the hairdresser, etc.
Reference A	A primary grouping for services within a department, used to provide sub-sections within the department in the report.
Reference B	A secondary grouping for services within a department, used to provide sub-sections within the department in the report.
Department	Department the service item belongs to.
Sub Department	Sub-department the service item belongs to.
Update	Press to save your changes.
Delete	Press to delete this KPI setting.

Appointment Customer report

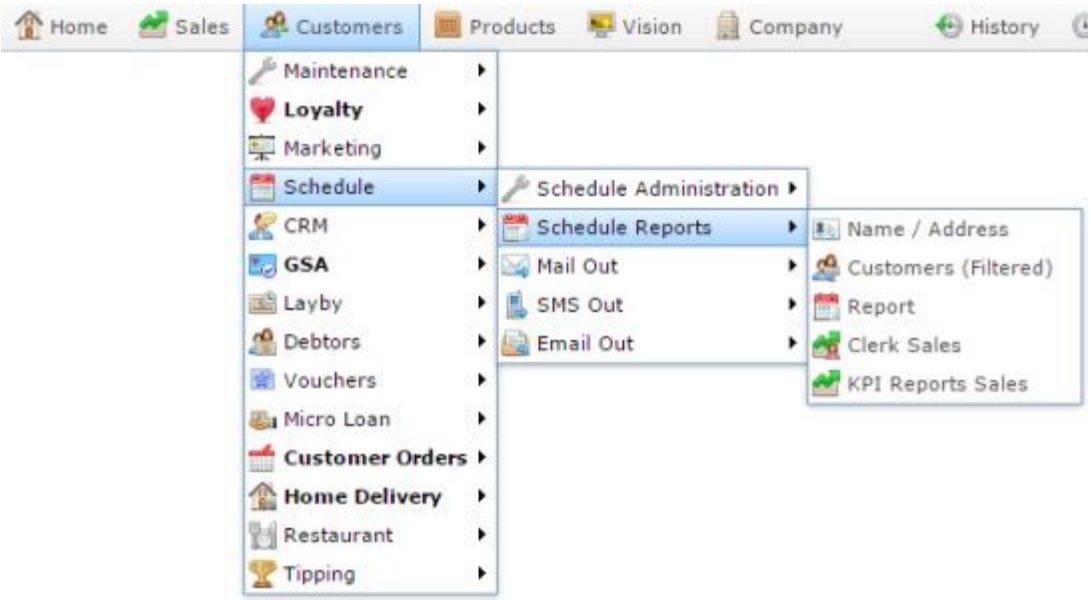
Use the Appointment Customer report to view customers with existing appointments.

Opening the Appointment Customer report

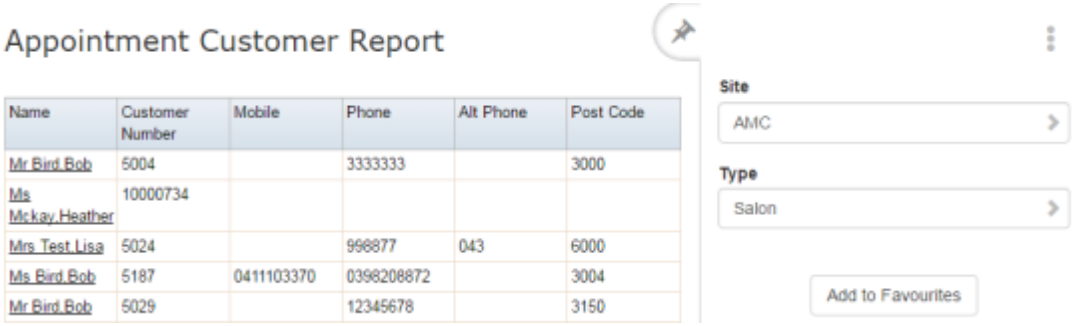
To open the Appointment Customer report:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Reports > Name / Address.



The Appointment Customer report is displayed.



Name	Customer Number	Mobile	Phone	Alt Phone	Post Code
Mr Bird,Bob	5004		3333333		3000
Ms Mckay,Heather	10000734				
Mrs Test,Lisa	5024		998877	043	6000
Ms Bird,Bob	5187	0411103370	0398208872		3004
Mr Bird,Bob	5029		12345678		3150

Appointment Customer report key fields

Filters area

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

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

Report area

This area displays report information.

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

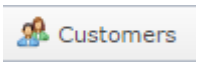
Field	Description
Name / **Customer /** **Customer Name /** **Debtor**	Name of the debtor or customer.
Customer ID / **Customer /** **Customer Number**	Unique code identifying the customer.
Post Code	Customer's post code.
Phone	Customer's phone number.
Mobile	Customer's mobile number.

Appointments For Customer report

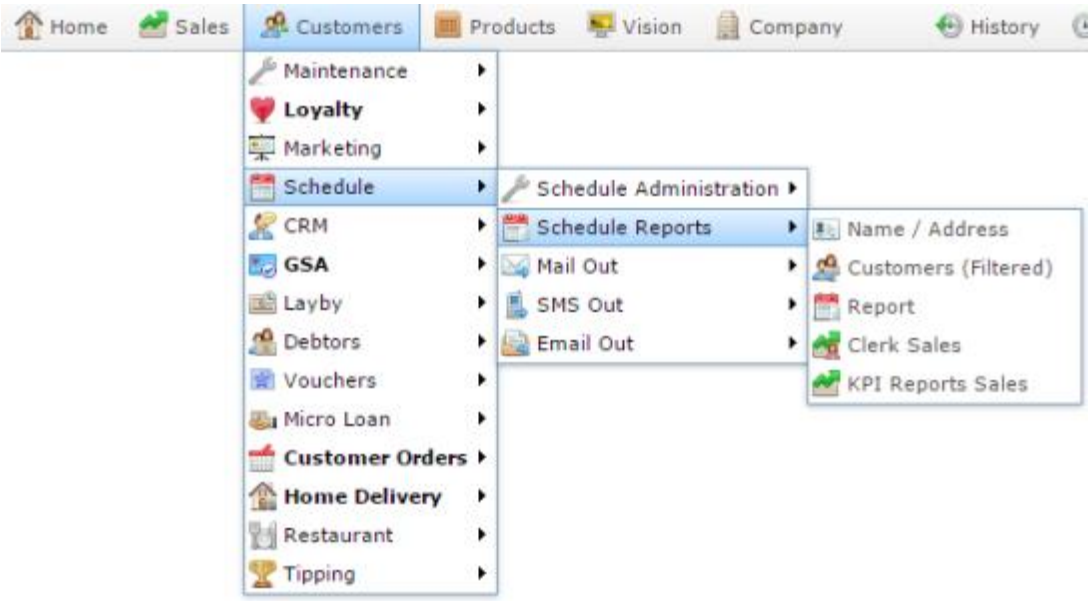
Use the Appointments For Customer report to view a customer's appointments and open them in the Portal.

Opening the Appointments For Customer report

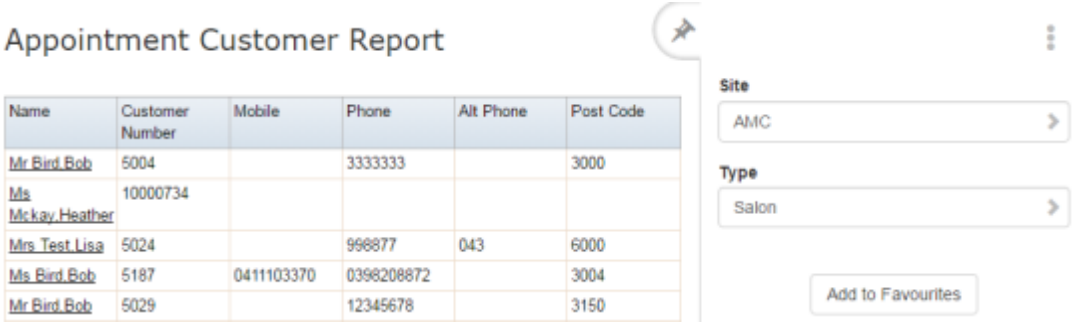
To open the Appointments For Customer report:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Reports > Name / Address.



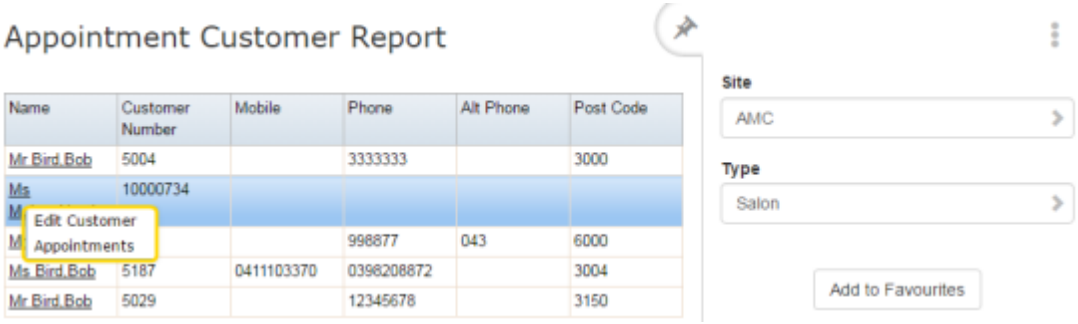
The Appointment Customer report is displayed.



Name	Customer Number	Mobile	Phone	Alt Phone	Post Code
Mr Bird Bob	5004		3333333		3000
Ms Mckay Heather	10000734				
Mrs Test Lisa	5024		998877	043	6000
Ms Bird Bob	5187	0411103370	0398208872		3004
Mr Bird Bob	5029		12345678		3150

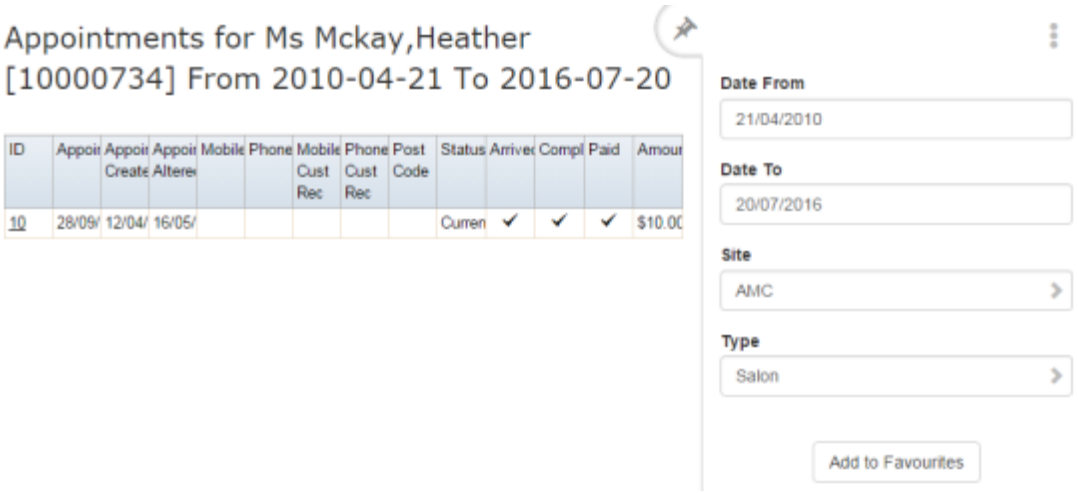
3. Press the Name of the customer whose appointments you want to view.

   A popup menu is displayed.



4. Press Appointments.

   The Appointments For Customer report is displayed.



Appointments For Customer report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.
Schedule / **Type /** **Select**	Select the schedule reference to report on.

Report area

This area displays report information.

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

Field	Description

Field	Description
ID	Unique ID of the appointment.
Appointment	Date of the appointment.
Appointment Created	Date the appointment was created.
Appointment Altered	Date the appointment was edited.
Mobile	Customer's mobile number.
Phone	Customer's phone number.
Mobile Cust Rec	Customers mobile number as recorded at time of booking.
Phone Cust Rec	Customer's landline number as recorded at time of booking.
Post Code	Customer's post code.
Status	Status of the appointment, for example Current, or Cancelled.
Arrived	Indicates the customer has been marked as arrived at this appointment.
Completed	Indicates this appointment has been completed.

Field	Description
Paid	Indicates this appointment has been paid in full.
Amount	Total amount due for this appointment.

Scheduler Detail Services report

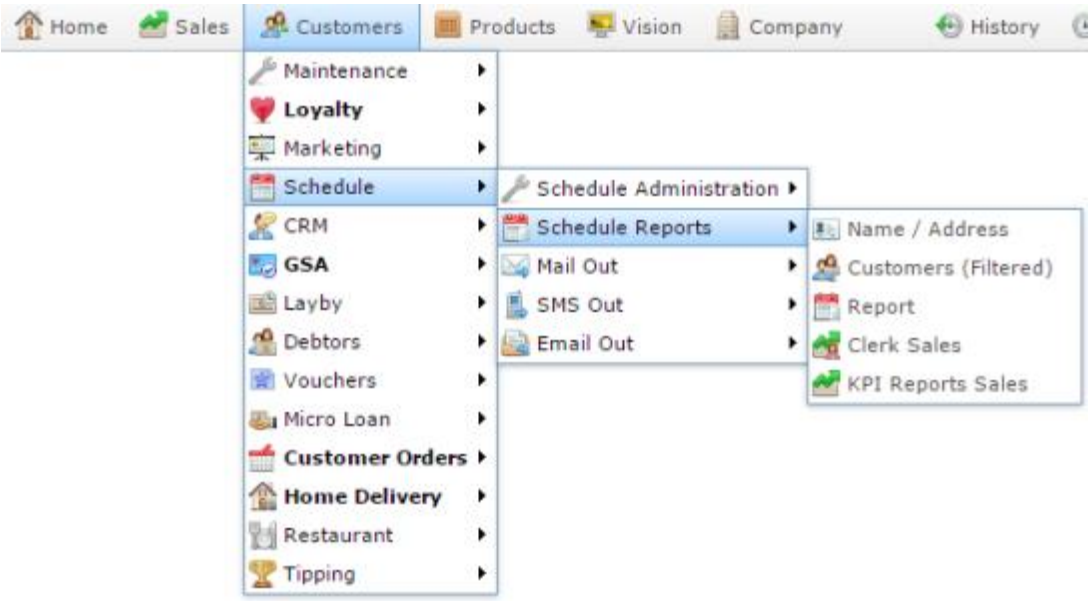
Use the Scheduler Detail Services report to view an appointment's details.

Note: You cannot create new appointments via the Portal.

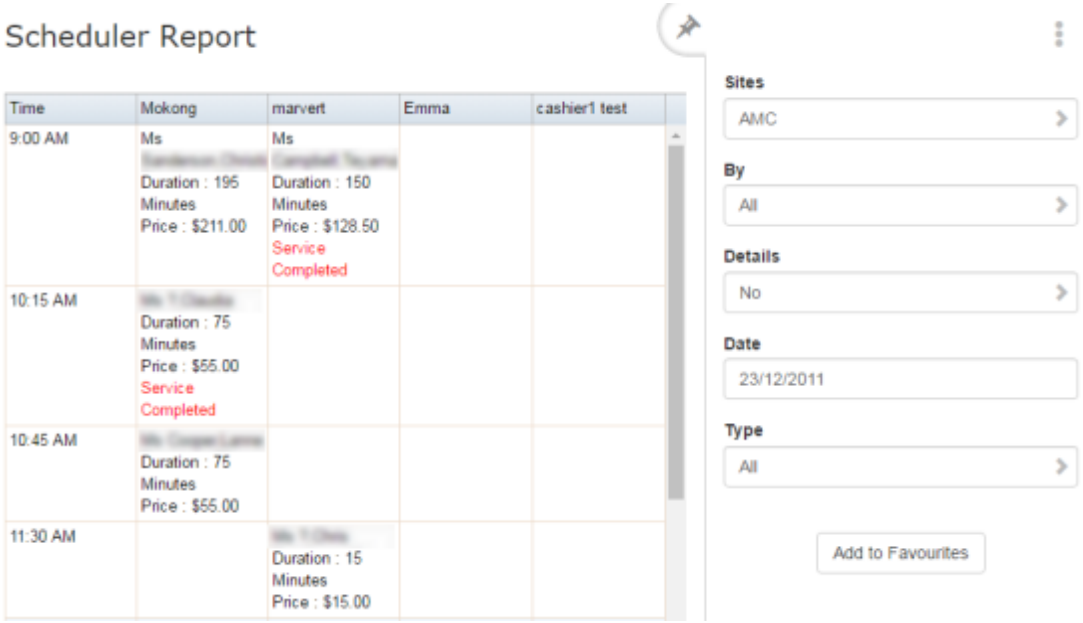
Opening the Scheduler Detail Services report

To open the Scheduler Detail Services report:

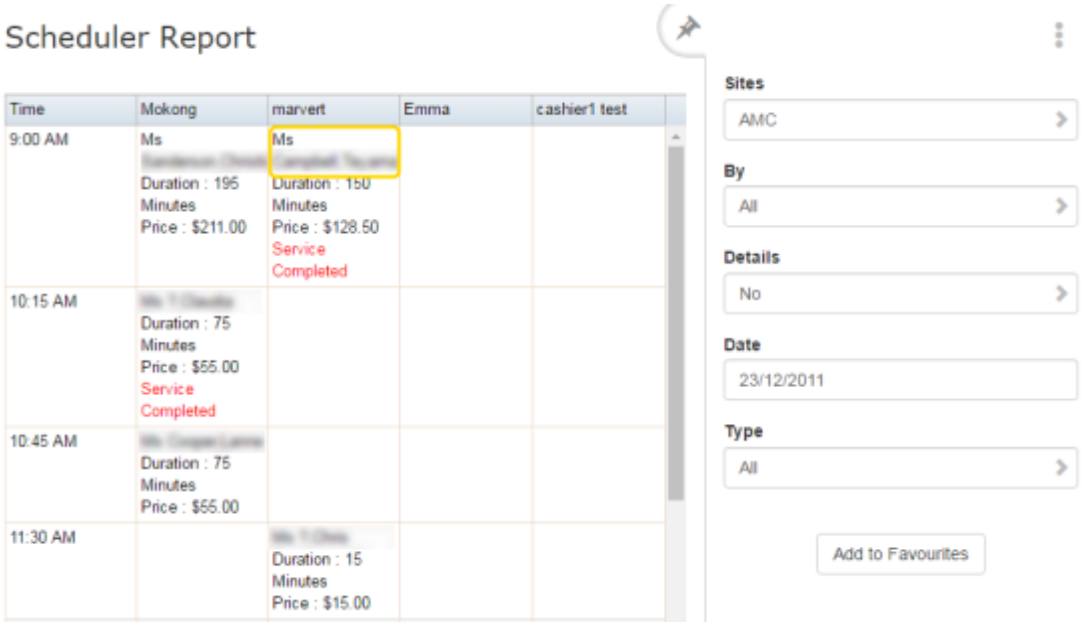
1. Press Customers from the menu bar.
2. Press Scheduler > Schedule Reports > Report.



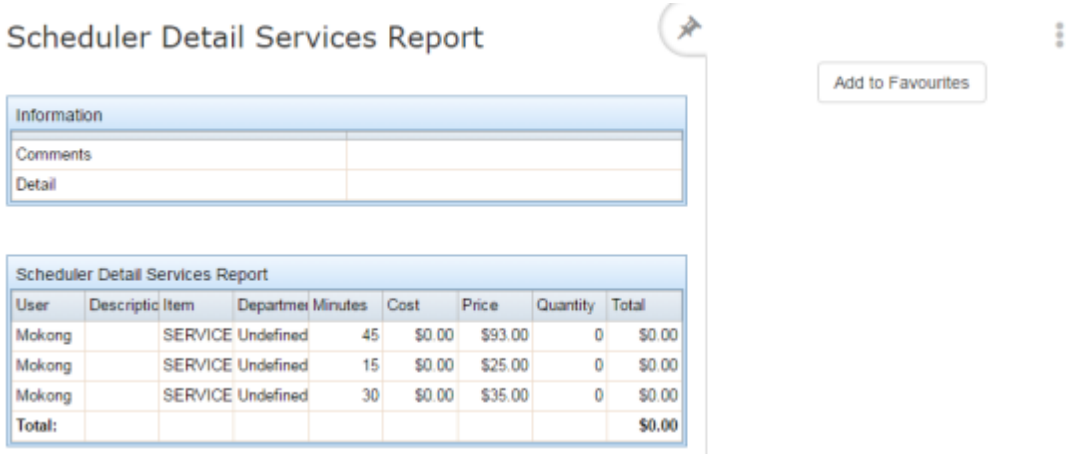
The Scheduler Services report is displayed.



3. Press the customer name of an appointment.



The Scheduler Detail Services report is displayed.



Scheduler Detail Services Report

Add to Favourites

Information

Comments	
Detail	

Scheduler Detail Services Report

User	Descriptic	Item	Departmer	Minutes	Cost	Price	Quantity	Total
Mokong		SERVICE	Undefined	45	$0.00	$93.00	0	$0.00
Mokong		SERVICE	Undefined	15	$0.00	$25.00	0	$0.00
Mokong		SERVICE	Undefined	30	$0.00	$35.00	0	$0.00
Total:								**$0.00**

Scheduler Detail Services report key fields

Filters area

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

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

Report area

This area displays report information.

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

Field	Description
Comments	Comments on the appointment.
Detail	Details added when adding services to the appointment.
User	The Portal user booked for the appointment.
Description	Description of the service item included in the appointment.
Item	Item code of the service item included in the appointment.
Department	Department of the service item.

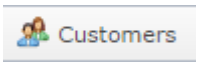
Field	Description
Minutes	Number of minutes the service item requires.
Cost	Cost of the service item.
Price	Price of the service item.
Quantity	Number of units of this item included in the service item.
Total	Total cost of all included units of the service item.

Clerk Scheduler Sales report

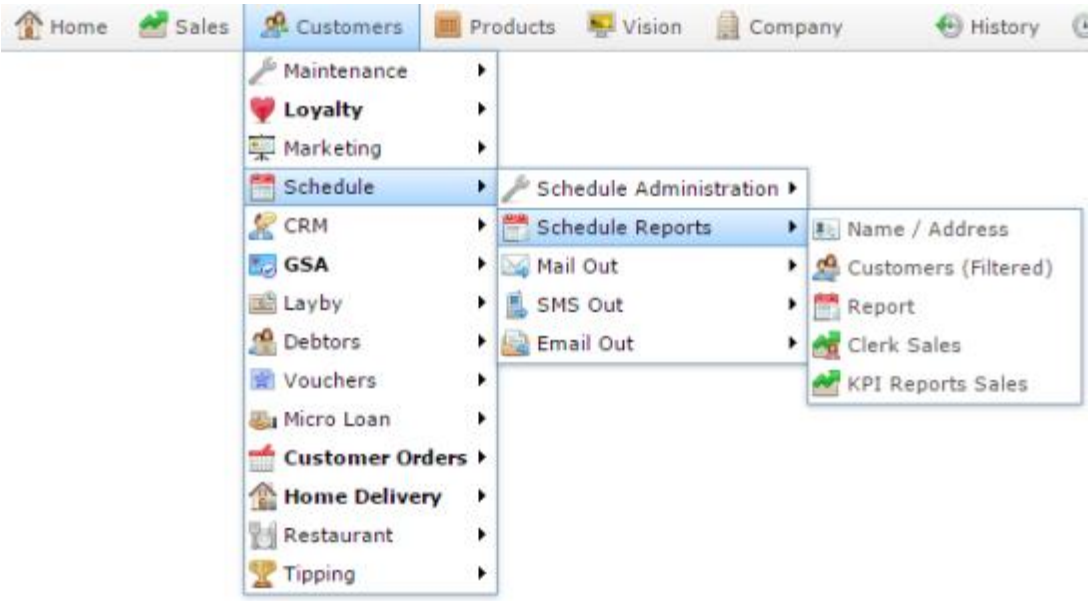
Use the Clerk Scheduler Sales report to view your Scheduler users' appointments for each date.

Opening the Clerk Scheduler Sales report

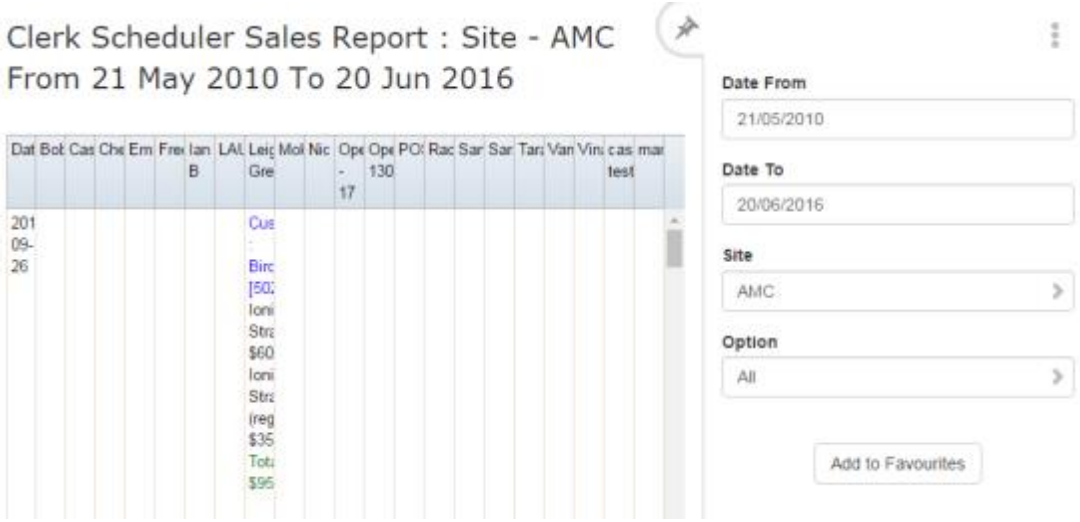
To open the Clerk Scheduler Sales report:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Reports > Clerk Sales.



The Clerk Scheduler Sales report is displayed.



Clerk Scheduler Sales report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.
Option	Select to filter the report to appointments that were ▪ Paid. ▪ Unpaid. ▪ Deleted. ▪ All appointments.

Report area

This area displays report information.

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

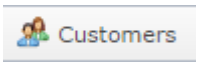
Field	Description
Date	Date of the appointment.
Username	Appointments for this user during this date.

Performance Tracker report

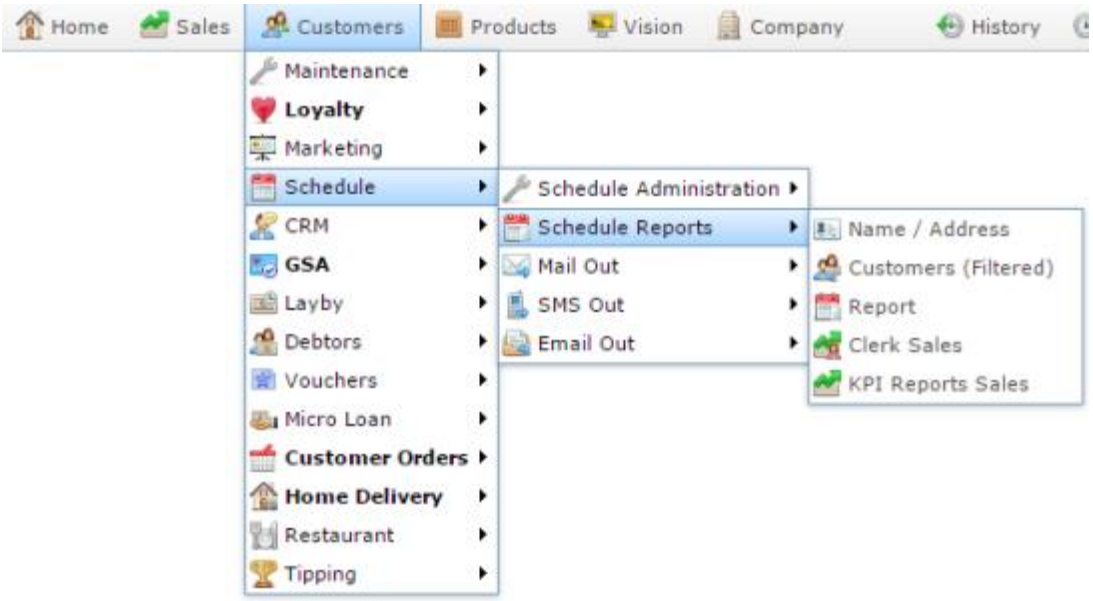
Use the Performance Tracker report to view how your different Scheduler sections perform in comparison to each other.

Opening the Performance Tracker report

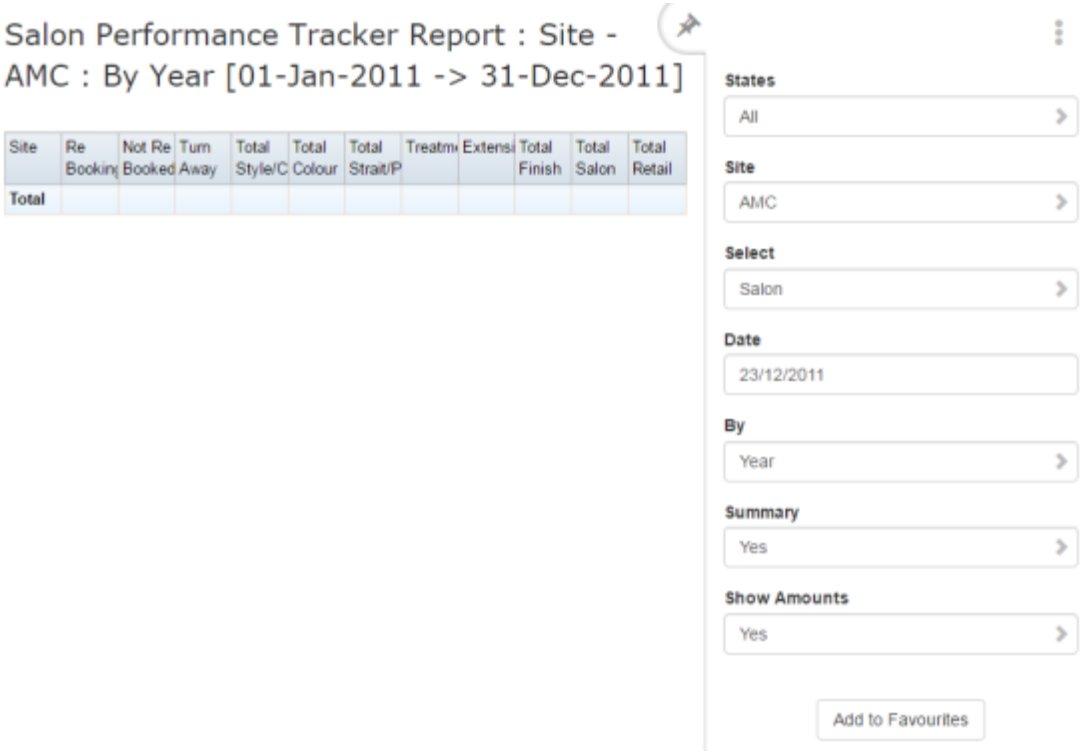
To open the Performance Tracker report:

1. Press 

from the menu bar.
2. Press Scheduler > Schedule Reports > KPI Report Sales.



The Performance Tracker report is displayed.


Salon Performance Tracker Report : Site - AMC : By Year [01-Jan-2011 -> 31-Dec-2011]
Site
Re Bookin
Not Re Booked
Turn Away
Total Style/C
Total Colour
Total Strait/P
Treatm
Extensi
Total Finish
Total Salon
Total Retail
Total
States
All
Site
AMC
Select
Salon
Date
23/12/2011
By
Year
Summary
Yes
Show Amounts
Yes
Add to Favourites

Performance Tracker report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
By	Select to display the report for a specific day, week, month or year.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.
Option / **Summary /** **Details**	Select to view a full report, or summary details.
Schedule / **Type /** **Select**	Select the schedule reference to report on.

Field	Description
Show Amounts	Select to display amounts on the report.

Report area

This area displays report information.

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

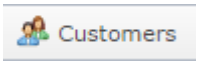
Field	Description
Site	The site where the transactions occurred.
Re Bookings	The total number of repeat bookings at this site.
Not Re Booked	The total number of appointments that did not result in a re-booking at this site.
Turn Away	The number of customers turned away at this site.
Total (Section Name)	The total appointments for each section, the number of services, number of customers, percentage of customers in this section compared to all sections, and total sales amount.
Total Retail	The total of transactions that were not services to indicate how well up-sell practices are performing.

Scheduler Customers report

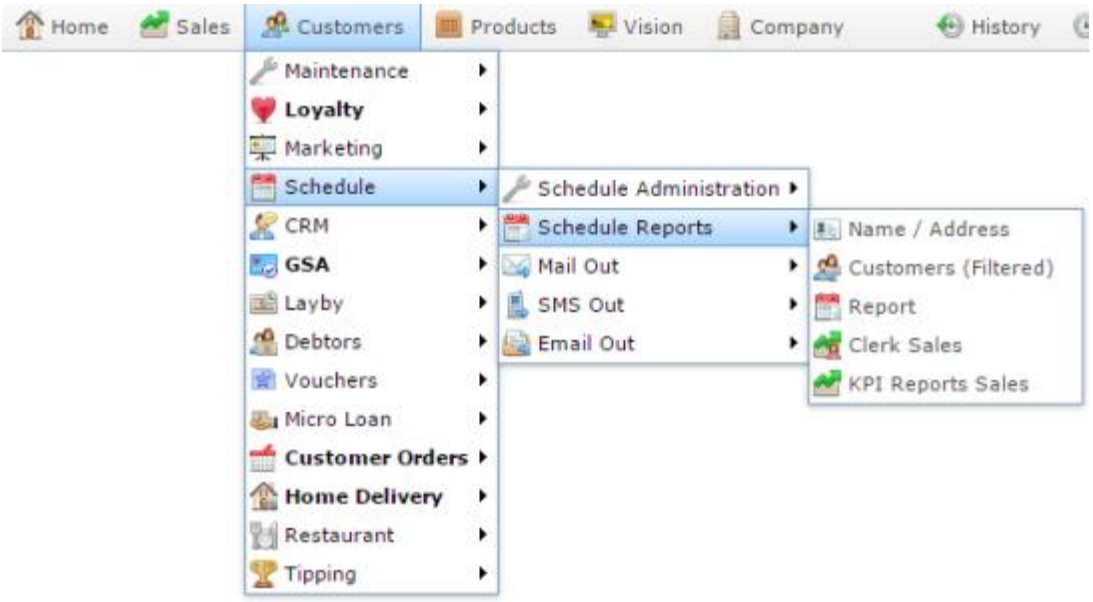
Use the Scheduler Customers report to view your schedule service customers.

Opening the Scheduler Customers report

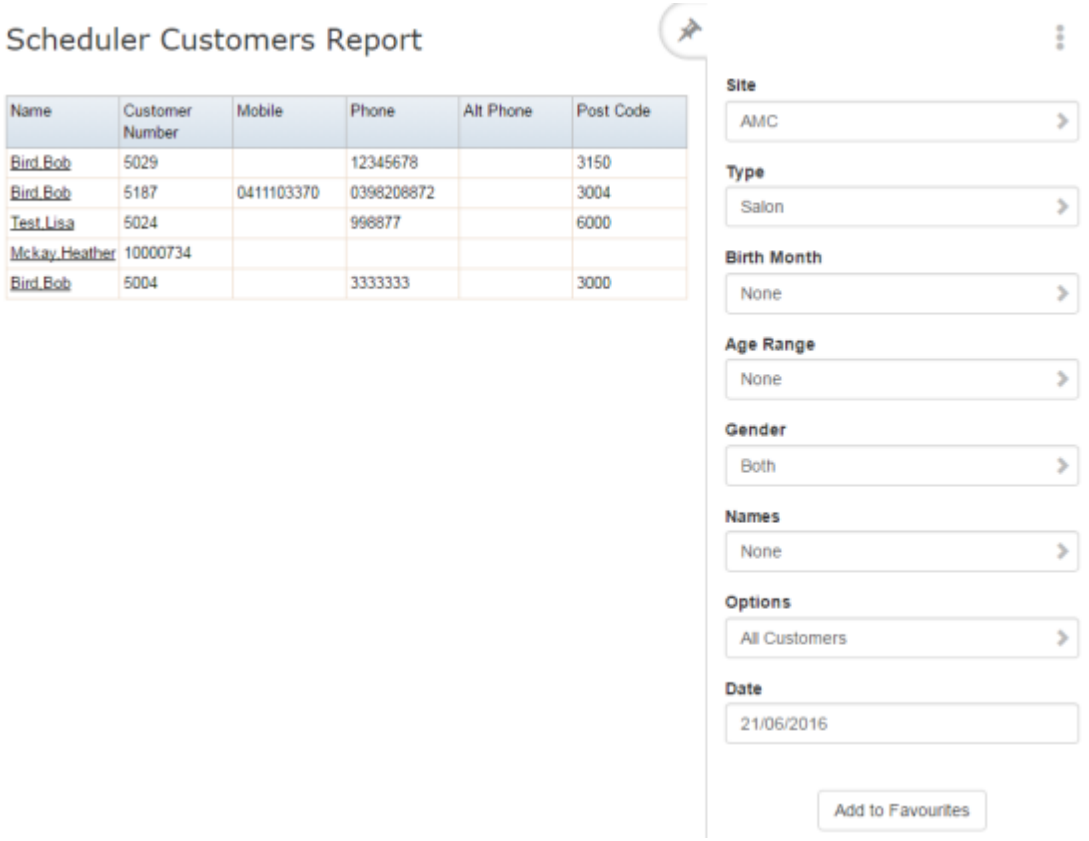
To open the Scheduler Customers report:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Reports > Customers (Filtered).



The Scheduler Customers report is displayed.


Scheduler Customers Report
Name
Customer Number
Mobile
Phone
Alt Phone
Post Code
Bird,Bob 5029 12345678 3150
Bird,Bob 5187 0411103370 0398208872 3004
Test,Lisa 5024 998877 6000
Mckay,Heather 10000734
Bird,Bob 5004 3333333 3000
Site
AMC
Type
Salon
Birth Month
None
Age Range
None
Gender
Both
Names
None
Options
All Customers
Date
21/06/2016
Add to Favourites

Scheduler Customers report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.
Gender	Select to restrict the report by gender.
Birth Month	Filter the report on the customer's birth month.
Age Range	Filter the report by the customer's age.
Names	Filter the report by the letter the customer's first or last names start with.

Field	Description
Schedule / Type / Select	Select the schedule reference to report on.
Option	Select whether to restrict the report to customers with appointments only.

Report area

This area displays report information.

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

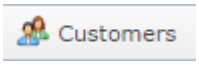
Field	Description
Name / **Customer /** **Customer Name /** **Debtor**	Name of the debtor or customer.
Customer ID / **Customer /** **Customer Number**	Unique code identifying the customer.
Post Code	Customer's post code.
Phone	Customer's phone number.
Mobile	Customer's mobile number.

Schedule User Edit report

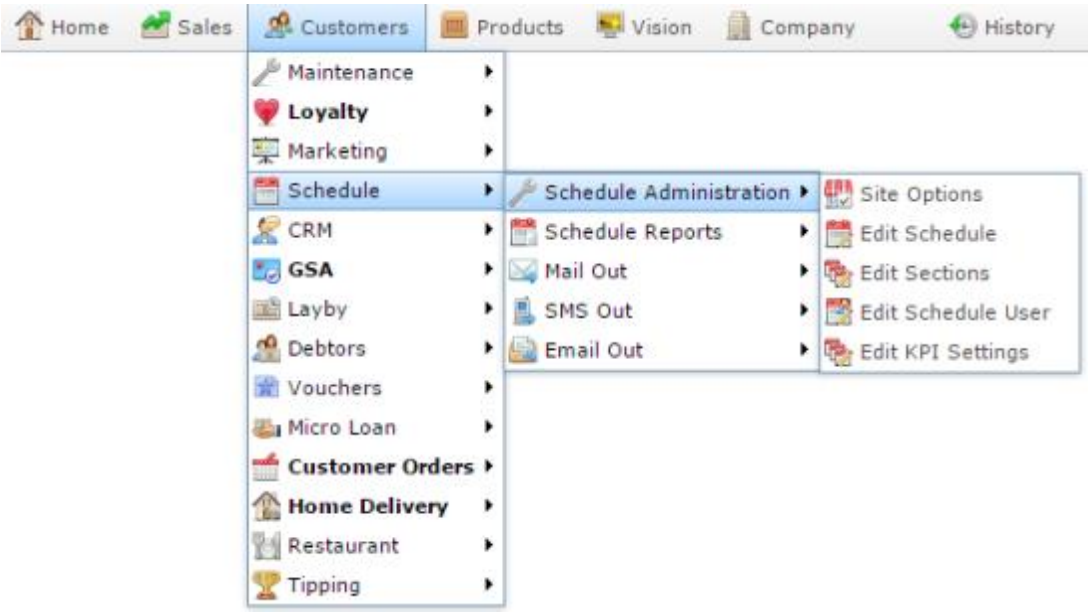
Use the Schedule User Edit report to add or remove users from your Scheduler.

Opening the Schedule User Edit report

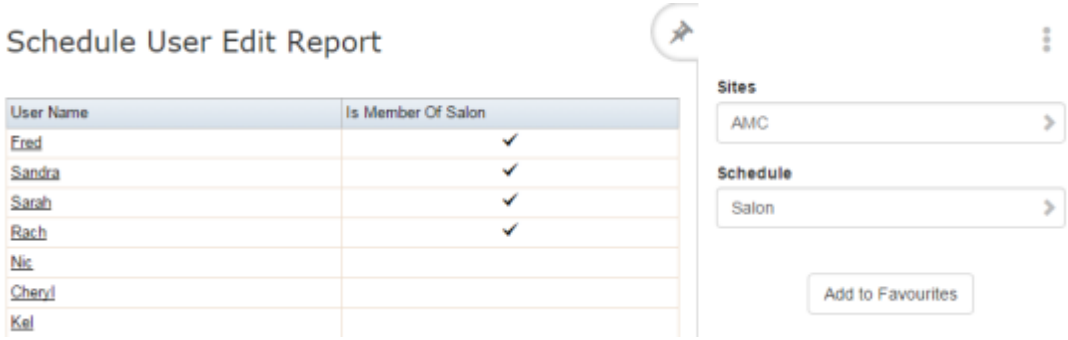
To open the Schedule User Edit report:

1. Press 

from the menu bar.
2. Press Schedule > Schedule Administration > Edit Schedule User.



The Schedule User Edit report is displayed.



Schedule User Edit report key fields

Filters area

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

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

Report area

This area displays report information.

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

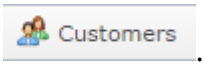
Field	Description
User Name	Name of the Portal operator.
Is Member Of Schedule Reference	Indicates whether this used is a member of the selected schedule reference.

Email Out Detail Maintenance screen

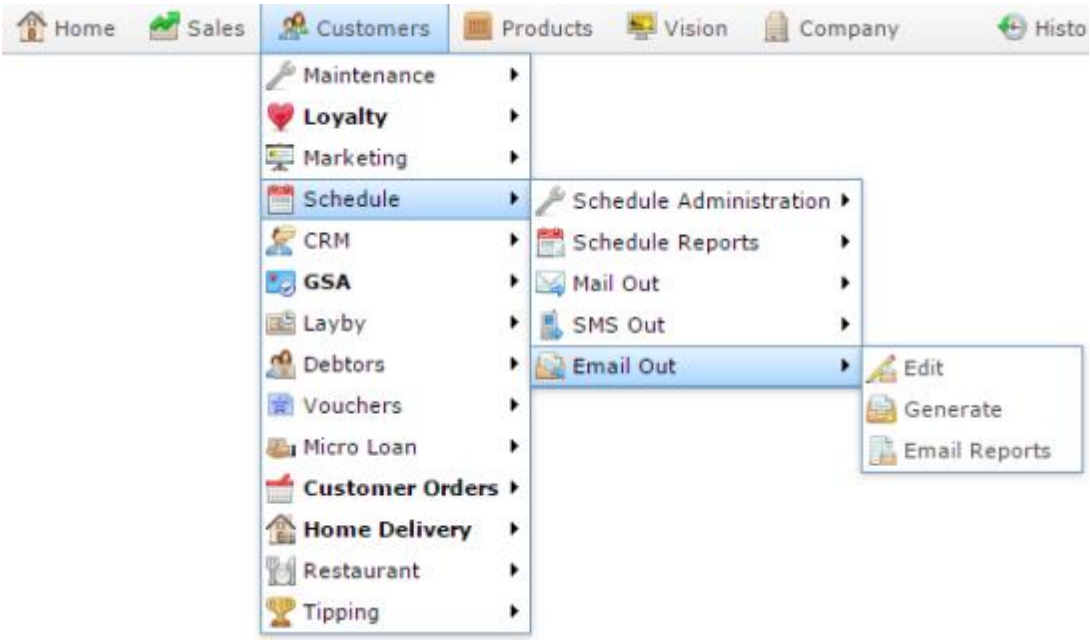
Use this screen to create and maintain emailed mail outs.

Opening the Email Out Detail Maintenance screen

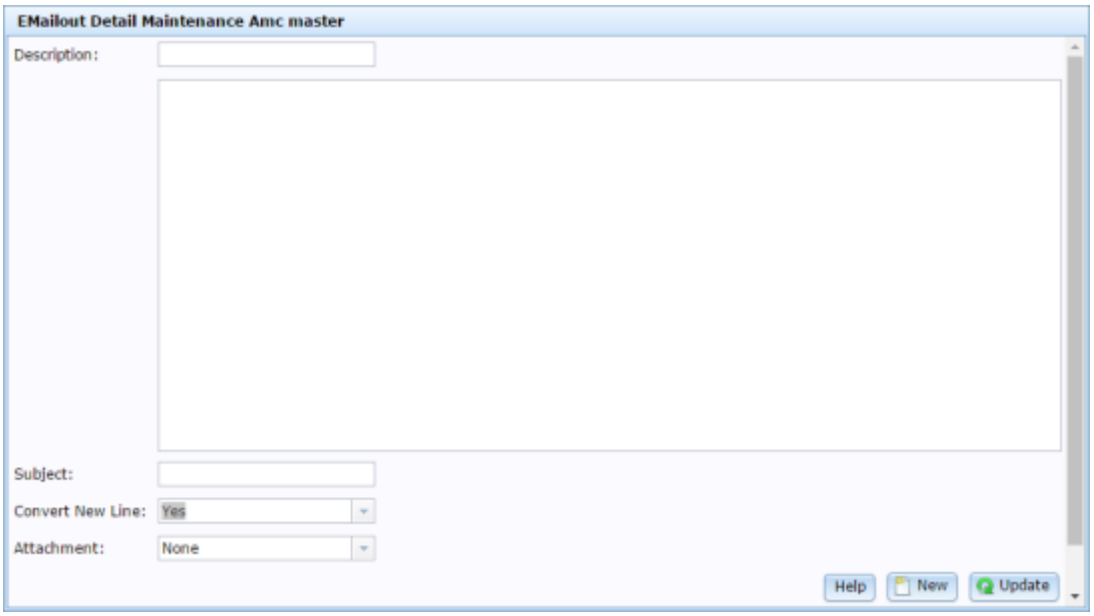
To open the Email Out Detail Maintenance screen:

1. Press 

.
2. Press Schedule > Email Out > Edit.



The Email Out Detail Maintenance screen is displayed.


EMailout Detail Maintenance Amc master
Description:
Subject:
Convert New Line:
Yes
Attachment:
None
Help
New
Update

Email Out Detail Maintenance screen key fields and buttons

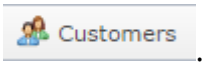
Field	Description
Description	Describe the email.
Body	Create the template of the email to send.
Subject	Type the subject line of the email.
Convert New Line	Select whether to convert newline characters to carriage returns.
Attachment	This field is not in use.
New	Press to create a new Email Out template.
Update	Press to save changes to the Email Out template.

Mail Out Detail Maintenance screen

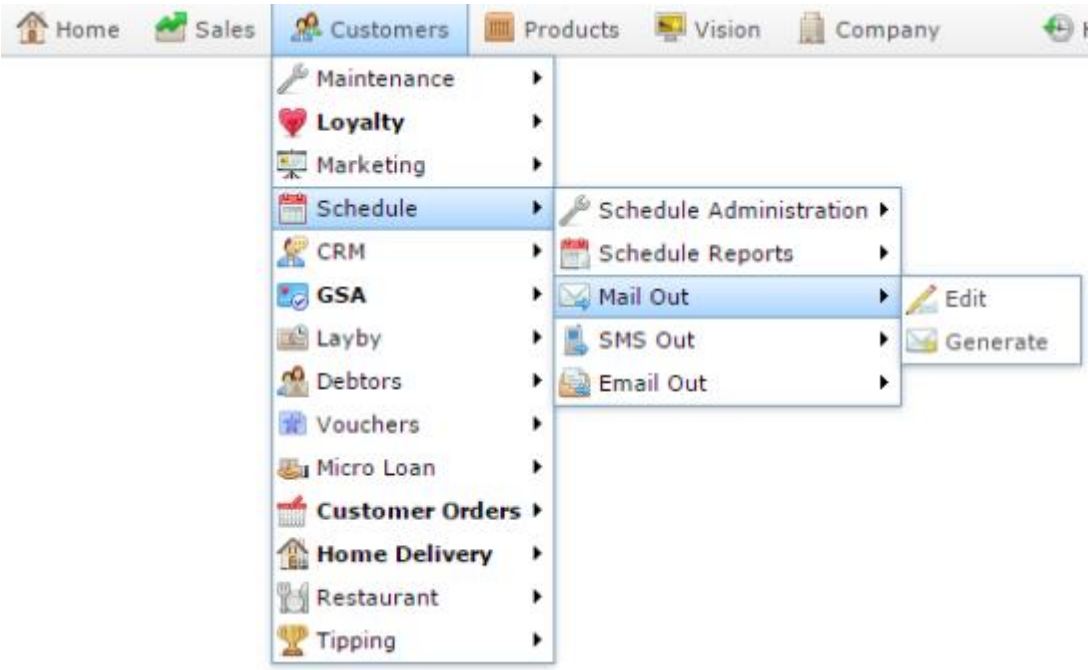
Use this screen to create and maintain printed mail outs.

Opening the Mail Out Detail Maintenance screen

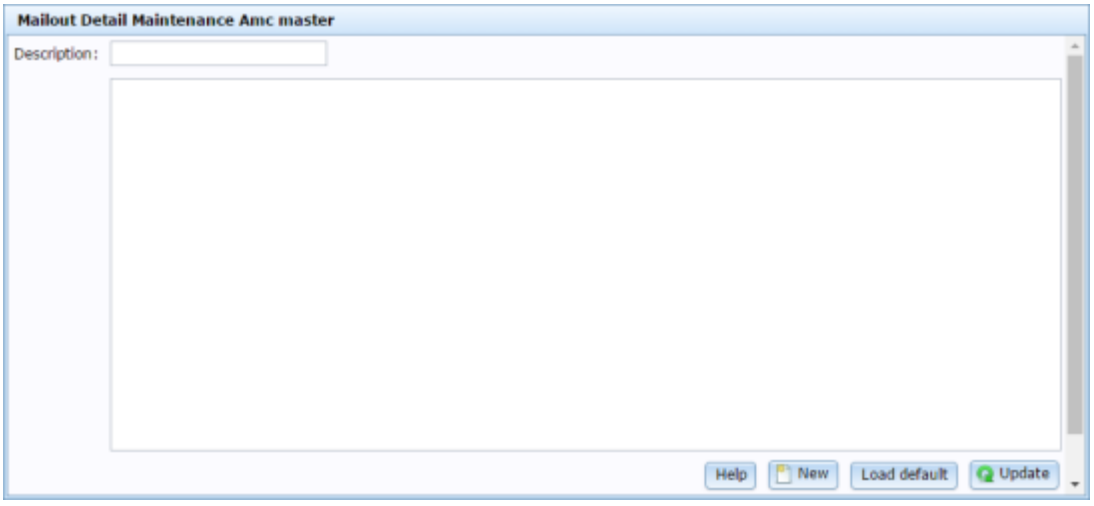
To open the Mail Out Detail Maintenance screen:

1. Press 

.
2. Press Schedule > Mail Out > Edit.



The Mail Out Detail Maintenance screen is displayed.



Mail Out Detail Maintenance screen key fields and buttons

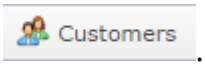
Field	Description
Description	Describe the mail out.
Body	Create the template of the mail out to send.
New	Press to create a new mail out template.
Load Default	Press to load the default mail out template for editing.
Save	Press to save changes to the mail out template.

SMS Detail Maintenance screen

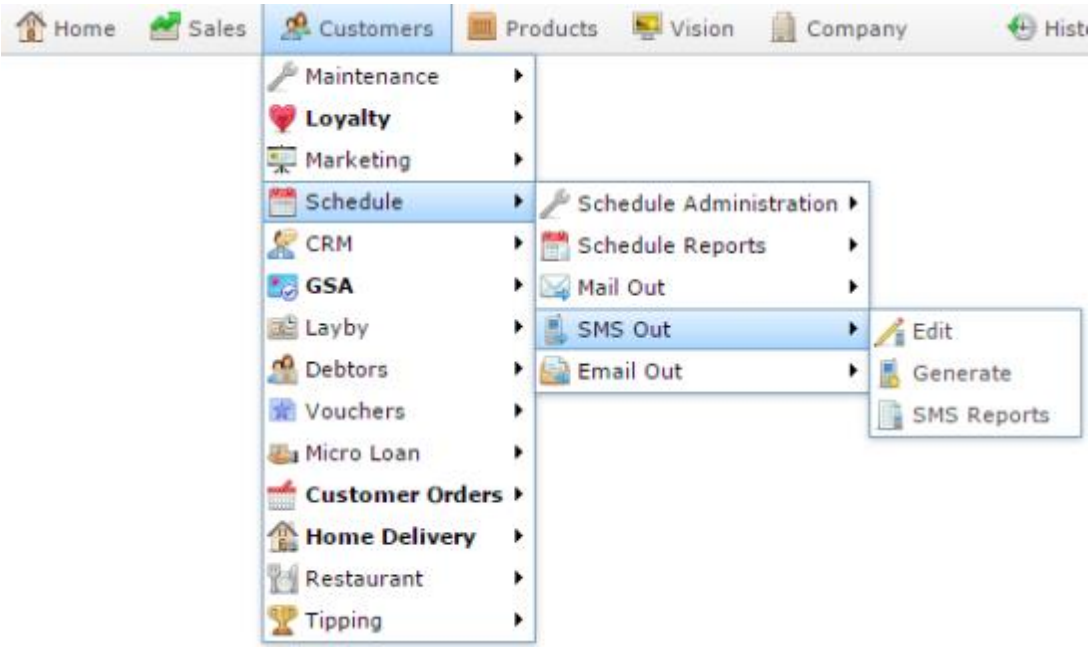
Use this screen to create or edit SMS messages.

Opening the SMS Detail Maintenance screen

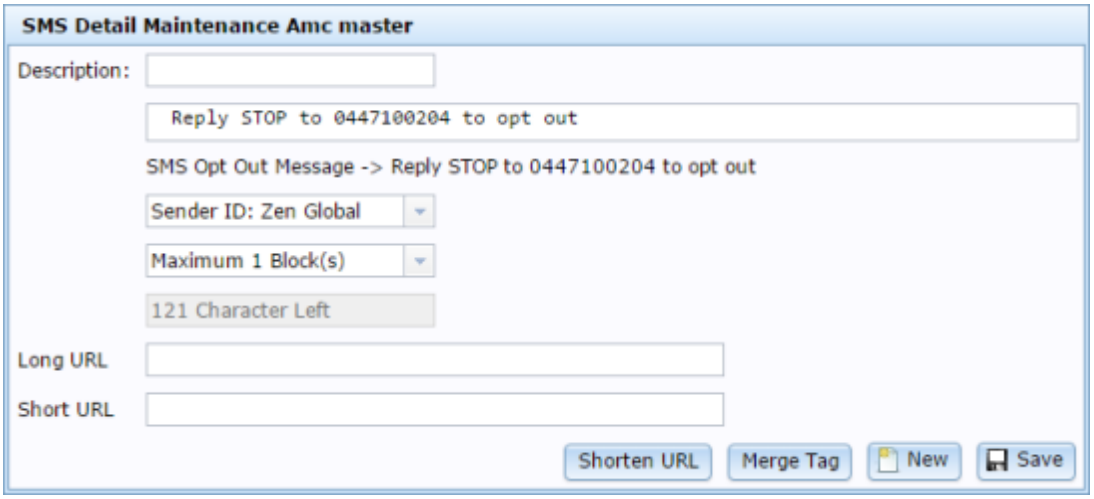
To open the SMS Detail Maintenance screen:

1. Press 

.
2. Press Schedule > SMS Out > Edit.



The SMS Detail Maintenance screen is displayed.



SMS Detail Maintenance screen key fields and buttons

Field	Description
Description	Describe the SMS mail out.
Body	Create the SMS mail out to send.
Sender	Select the phone address the SMS should be sent from.
Maximum Block	Select the maximum number of blocks of an SMS being sent.
Characters Left	Displays the number of characters remaining in the SMS block.
Long URL	Copy a long URL into this field to shorten it.
Short URL	Shortened URL you can copy into the body.
Shorten URL	Press to convert a long URL into a short URL.
Merge Tag	Press to use a merge tag to personalise the SMS mail out.
New	Press to create a new SMS.
Save	Press to save changes to the SMS.

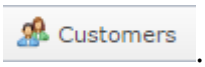
Scheduler Email Generation report

Use the Scheduler Email Generation report to generate a list of customers to send an emailed mail out to.

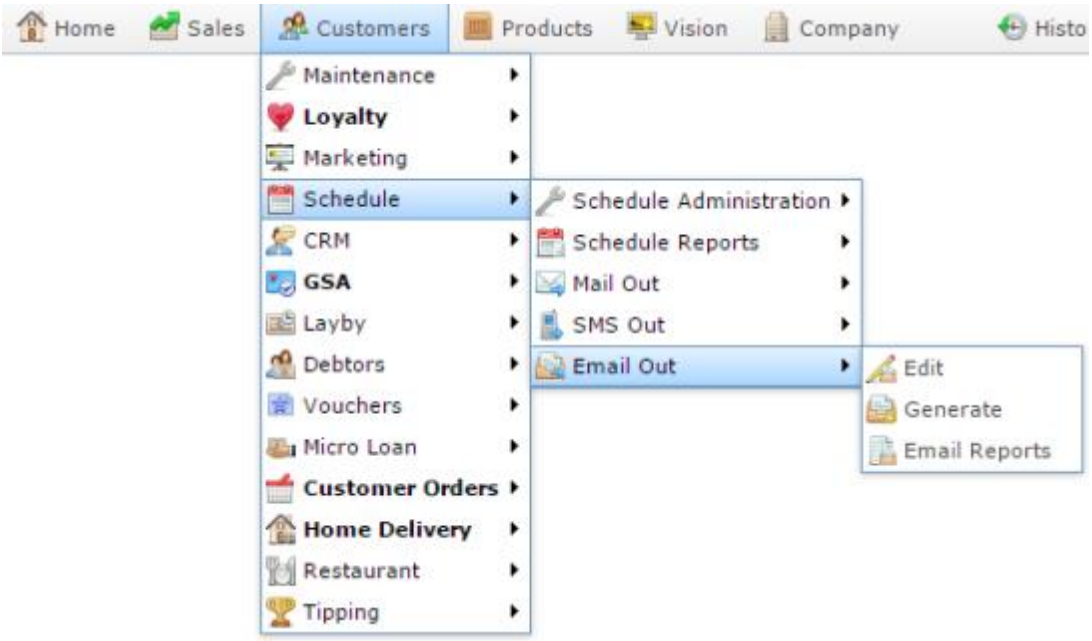
> **Tip:** Emails can be sent immediately or batched to be sent later. See *Sending email mail outs*.

Opening the Scheduler Email Generation report

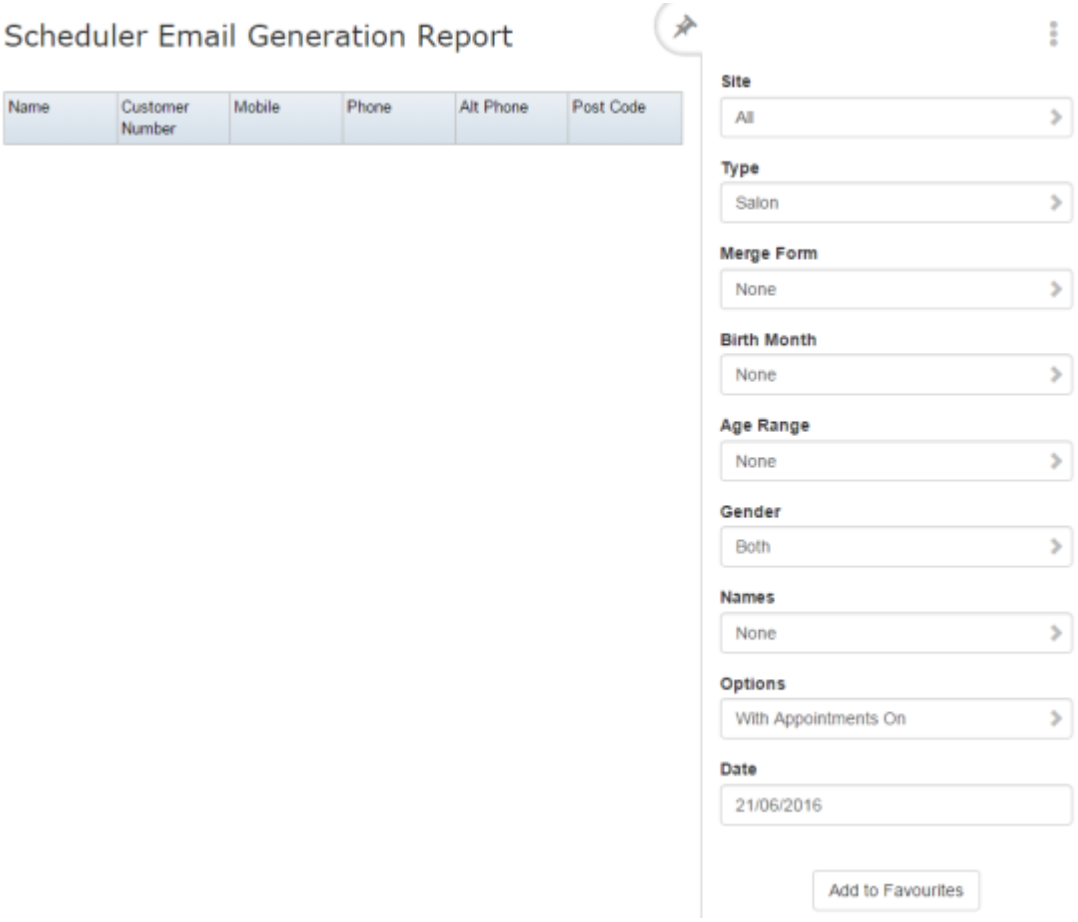
To open the Scheduler Email Generation report:

1. Press 

.
2. Press Schedule > Email Out > Generate.



The Scheduler Email Generation report is displayed.


Scheduler Email Generation Report
Name
Customer Number
Mobile
Phone
Alt Phone
Post Code
Site
All
Type
Salon
Merge Form
None
Birth Month
None
Age Range
None
Gender
Both
Names
None
Options
With Appointments On
Date
21/06/2016
Add to Favourites

Scheduler Email Generation report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Gender	Select to restrict the report by gender.
Birth Month	Filter the report on the customer's birth month.
Age Range	Filter the report by the customer's age.
Names	Filter the report by the letter the customer's first or last names start with.
Schedule / **Type /** **Select**	Select the schedule reference to report on.
Merge Form	Select a merge form to create the mail out with.

Field	Description
Options	Select either: ▪ All customers that match the criteria. ▪ Only customers who match the criteria with appointments on the selected Date.
Date	Select the appointment date to filter the reports on, if With Appointments On is selected in the Option filter.

Report area

This area displays report information.

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

Field	Description
Name / **Customer /** **Customer Name /** **Debtor**	Name of the debtor or customer.
Customer ID / **Customer /** **Customer Number**	Unique code identifying the customer.
Post Code	Customer's post code.
Phone	Customer's phone number.
Mobile	Customer's mobile number.

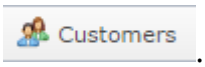
Scheduler Mail Out Generation report

Use the Scheduler Mail Out Generation report to create a list of customers to send mail outs to.

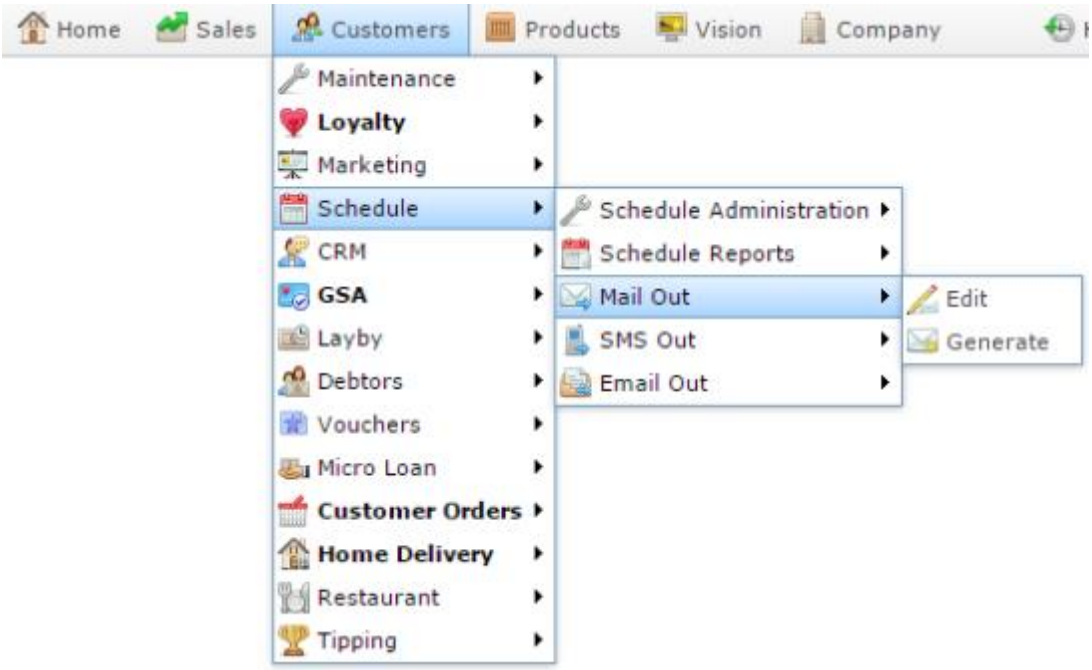
> **Tip:** Emails can be sent immediately or batched to be sent later. See *Sending email mail outs*.

Opening the Scheduler Mail Out Generation report

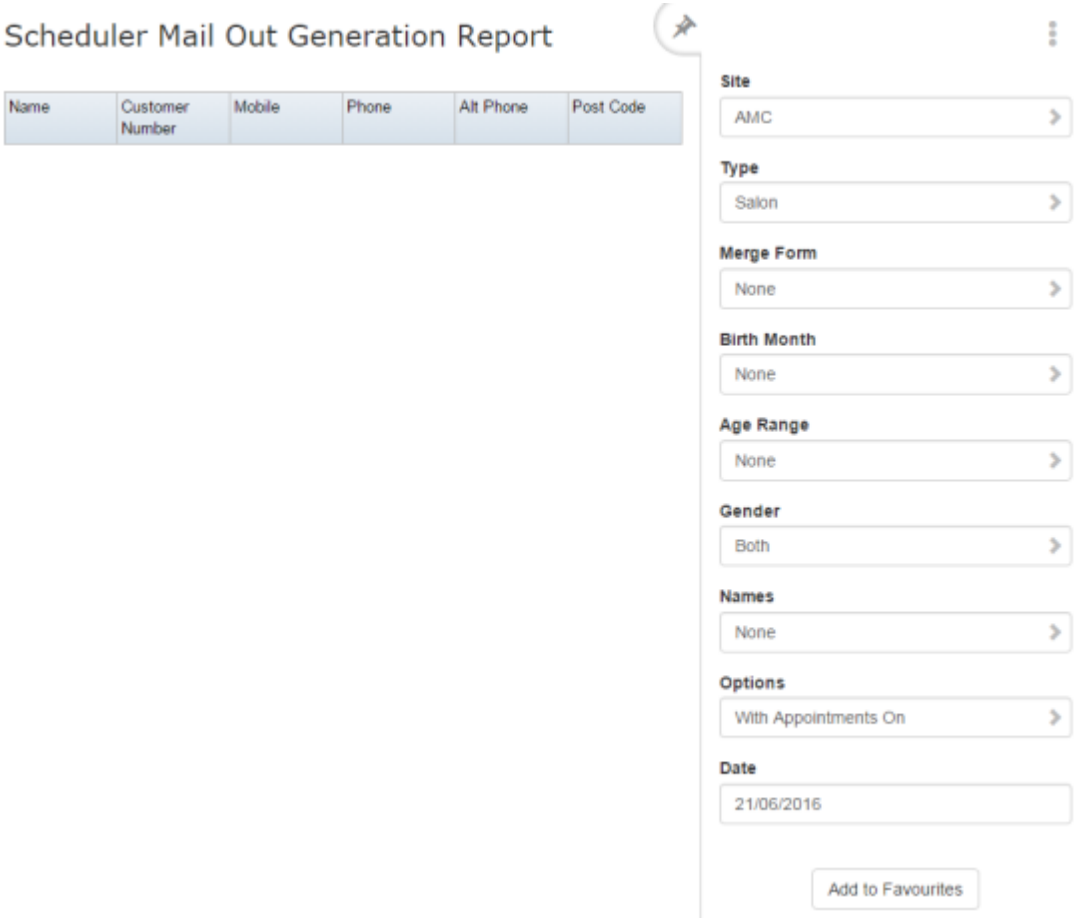
To open the Scheduler Mail Out Generation report:

1. Press 

.
2. Press Schedule > Mail Out > Generate.



The Scheduler Mail Out Generation report is displayed.


Scheduler Mail Out Generation Report
Name
Customer Number
Mobile
Phone
Alt Phone
Post Code
Site
AMC
Type
Salon
Merge Form
None
Birth Month
None
Age Range
None
Gender
Both
Names
None
Options
With Appointments On
Date
21/06/2016
Add to Favourites

Scheduler Mail Out Generation report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Gender	Select to restrict the report by gender.
Birth Month	Filter the report on the customer's birth month.
Age Range	Filter the report by the customer's age.
Names	Filter the report by the letter the customer's first or last names start with.
Schedule / **Type /** **Select**	Select the schedule reference to report on.
Merge Form	Select a merge form to create the mail out with.

Field	Description
Options	Select either: ▪ All customers that match the criteria. ▪ Only customers who match the criteria with appointments on the selected Date.
Date	Select the appointment date to filter the reports on, if With Appointments On is selected in the Option filter.

Report area

This area displays report information.

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

Field	Description
Name / **Customer /** **Customer Name /** **Debtor**	Name of the debtor or customer.
Customer ID / **Customer /** **Customer Number**	Unique code identifying the customer.
Post Code	Customer's post code.
Phone	Customer's phone number.
Mobile	Customer's mobile number.

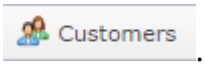
Scheduler SMS Generation report

Use the Scheduler SMS Generation report to generate a list of customers to send an SMS mail out to.

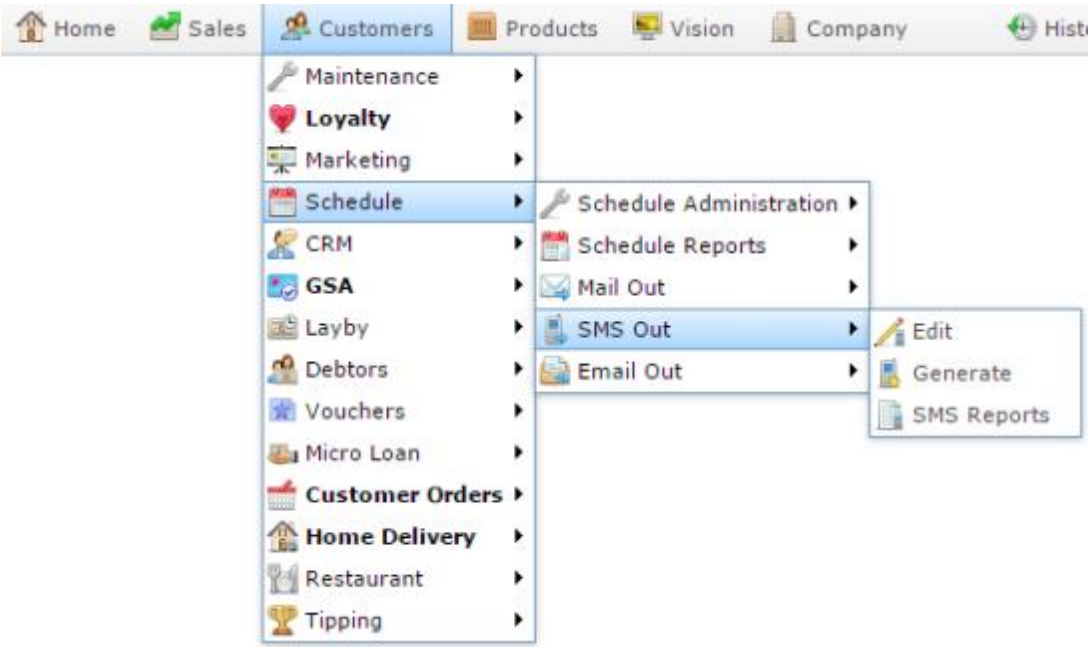
> **Tip:** Emails can be sent immediately or batched to be sent later. See *Sending email mail outs*.

Opening the Scheduler SMS Generation report

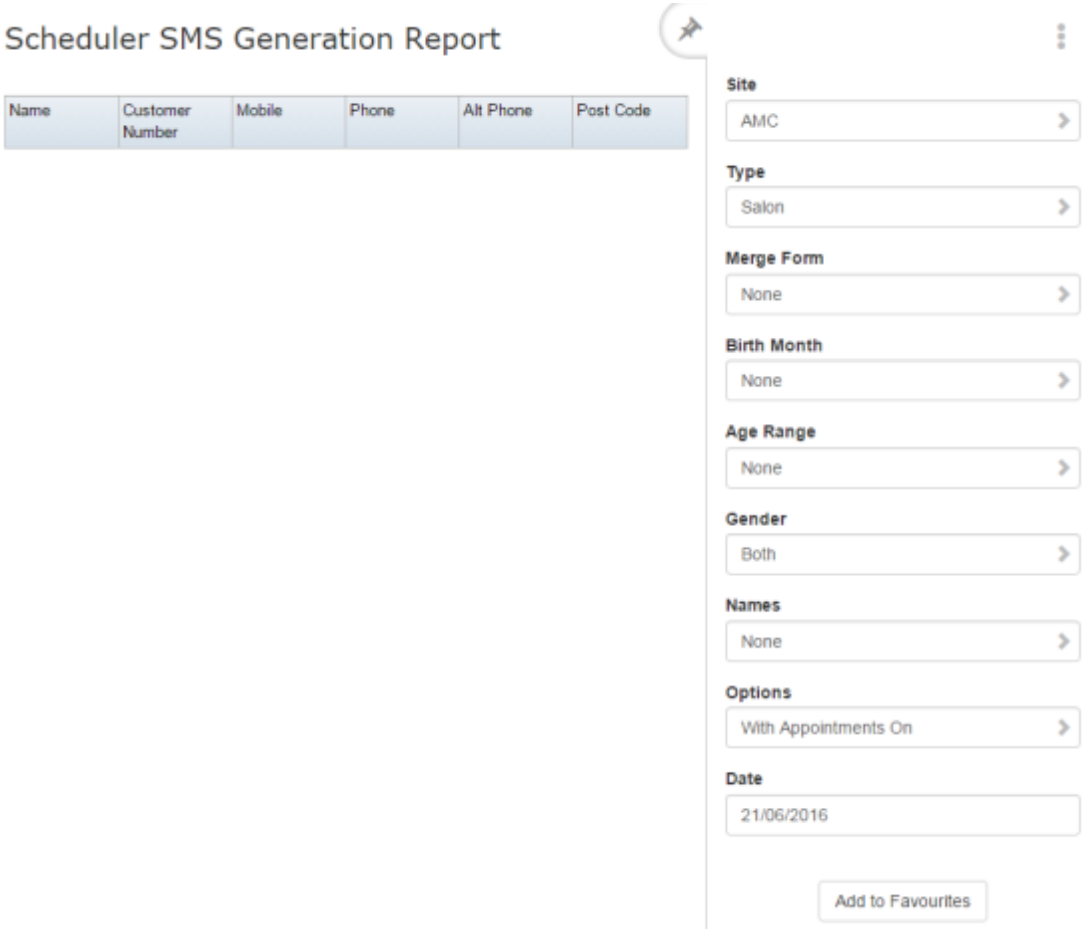
To open the Scheduler SMS Generation report:

1. Press 

.
2. Press Schedule > SMS Out > Generate.



The Scheduler SMS Generation report is displayed.


Scheduler SMS Generation Report
Name
Customer Number
Mobile
Phone
Alt Phone
Post Code
Site
AMC
Type
Salon
Merge Form
None
Birth Month
None
Age Range
None
Gender
Both
Names
None
Options
With Appointments On
Date
21/06/2016
Add to Favourites

Scheduler SMS Generation report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Gender	Select to restrict the report by gender.
Birth Month	Filter the report on the customer's birth month.
Age Range	Filter the report by the customer's age.
Names	Filter the report by the letter the customer's first or last names start with.
Schedule / **Type /** **Select**	Select the schedule reference to report on.
Merge Form	Select a merge form to create the mail out with.

Field	Description
Options	Select either: ▪ All customers that match the criteria. ▪ Only customers who match the criteria with appointments on the selected Date.
Date	Select the appointment date to filter the reports on, if With Appointments On is selected in the Option filter.

Report area

This area displays report information.

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

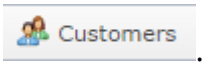
Field	Description
Name / **Customer /** **Customer Name /** **Debtor**	Name of the debtor or customer.
Customer ID / **Customer /** **Customer Number**	Unique code identifying the customer.
Post Code	Customer's post code.
Phone	Customer's phone number.
Mobile	Customer's mobile number.

Sites Email report

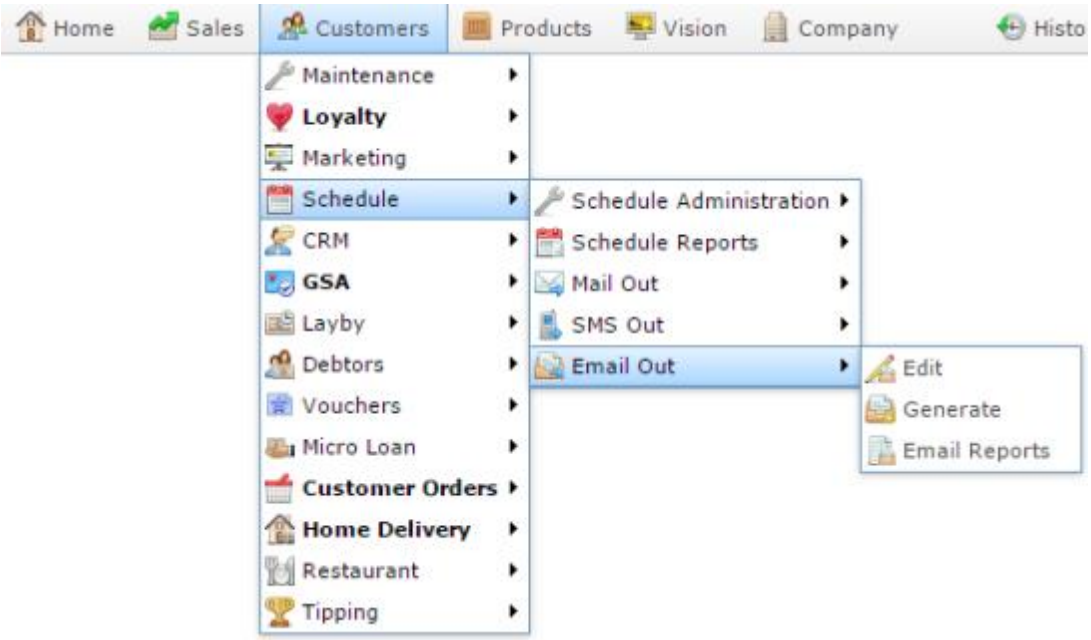
Use the Sites Email report to view emails sent by site.

Opening the Sites Email report

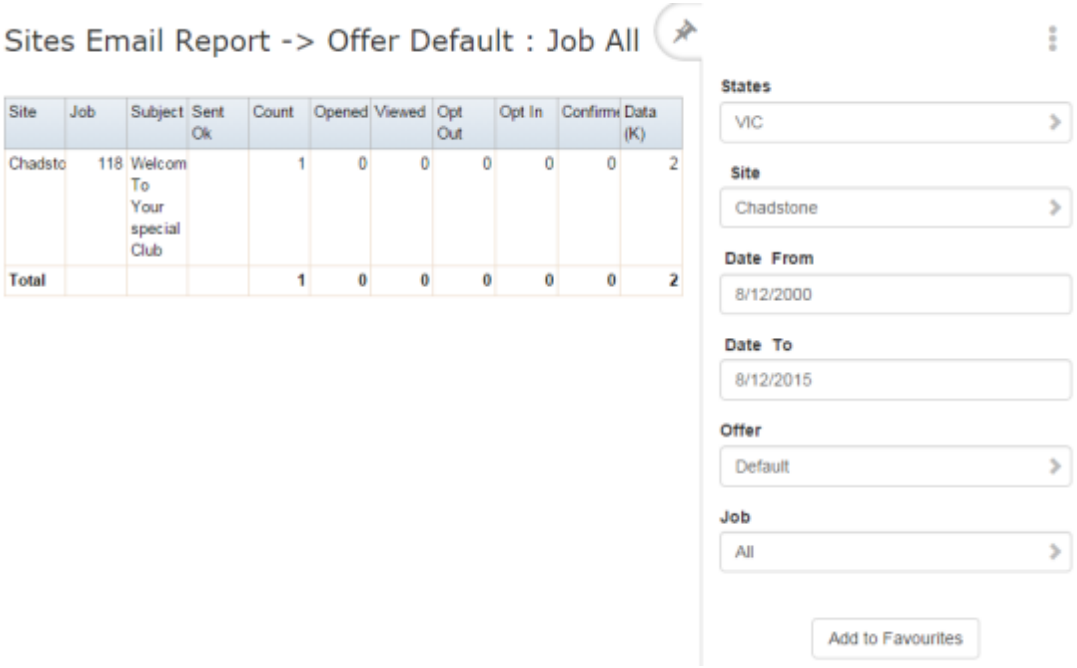
To open the Sites Email report:

1. Press 

.
2. Press Schedule > Email Out > Email Reports.



The Sites Email report is displayed.



Site	Job	Subject	Sent Ok	Count	Opened	Viewed	Opt Out	Opt In	Confirme	Data (K)
Chadsto	118	Welcom To Your special Club		1	0	0	0	0	0	2
Total				**1**	**0**	**0**	**0**	**0**	**0**	**2**

Sites Email report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.
States	Select a state or county to filter the report by.
Offer	Select a specific customer offer to report on.

Field	Description
Job	Select the type of communication record to display: ▪ All. ▪ Loyalty Events. ▪ Lost Loyalty Password. ▪ User Messages. ▪ Alarms. ▪ Support Emails. ▪ Debtor Statements. ▪ Franchise Event. ▪ Franchise Fee. ▪ Purchase Order Submit. ▪ Purchase Order Response. ▪ Purchase Order Requisition. ▪ Scheduler. ▪ Lay Buy. ▪ Micro Loan.

Report area

This area displays report information.

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

Field	Description
Site	Site the email or SMS originated from.
Job	Job that the email or SMS relates to. For example, a loyalty event.
Subject	Subject line of the email.
Sent OK	Indicates whether the email batch was sent successfully.
Count	Number of emails or SMS messages sent in the batch.
Opened	Indicate whether this email was opened. **Note:** Browser settings can prevent this action being detected.
Viewed	Indicates whether a customer clicked the View Here link to read the HTML version of the email.

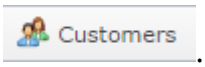
Field	Description
Opt Out	Indicates whether the customer elected to opt-out of receiving further marketing material.
Opt In	Indicates whether the customer elected to receive further emails from this email.
Confirmation	The customer has clicked a link in an email that confirms their email address is correct.
Data (K)	Size of the individual email.

Sites SMS Summary report

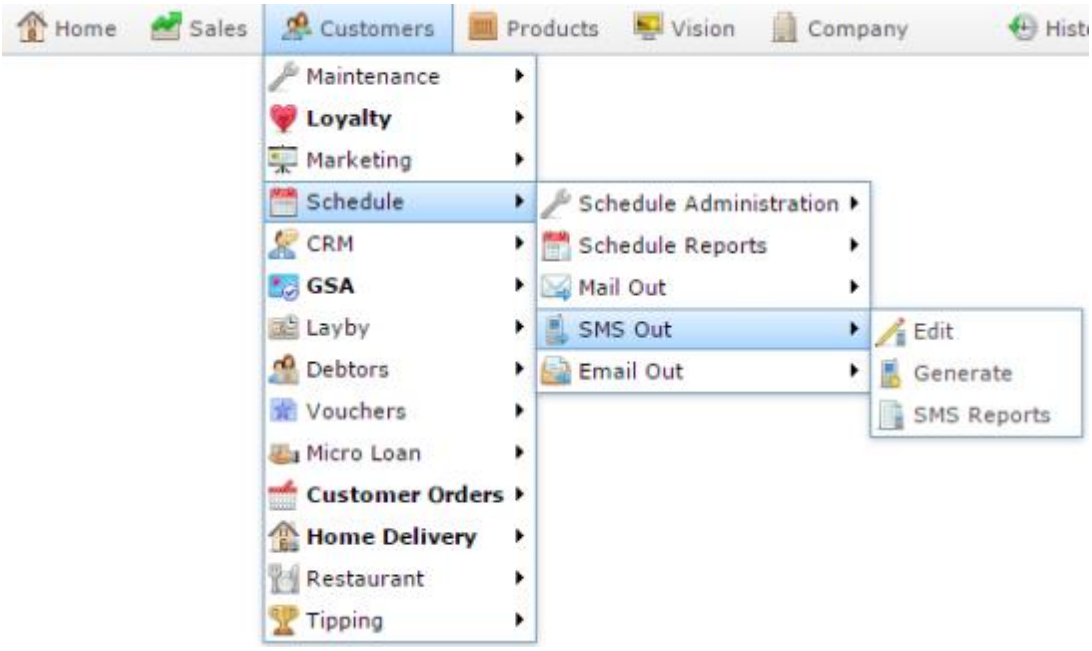
Use the Sites SMS Summary report to view the results of SMS messages sent to appointment customers.

Opening the Sites SMS Summary report

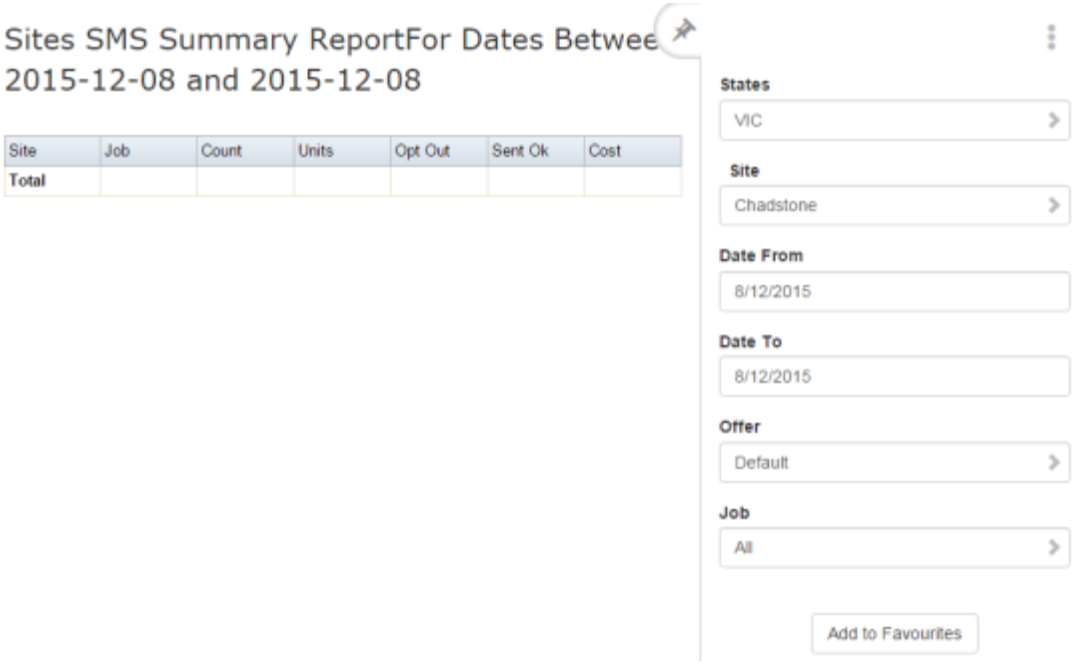
To open the SMS Report Options screen:

1. Press 

.
2. Press Schedule > SMS Out > SMS Reports.



The Sites SMS Summary report is displayed.


Sites SMS Summary ReportFor Dates Betwee
2015-12-08 and 2015-12-08
Site
Job
Count
Units
Opt Out
Sent Ok
Cost
Total
States
VIC
Site
Chadstone
Date From
8/12/2015
Date To
8/12/2015
Offer
Default
Job
All
Add to Favourites

Sites SMS Summary report key fields

Filters area

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

Field	Description
Add to Favourites	Press to add this report to your Portal favourites for easier access.
Site / **Sites**	Select the site or sites to report on.
Date / **Date From and Date To /** **As of /** **Start Date and End Date**	Select the date or date period to report on.
States	Select a state or county to filter the report by.
Offer	Select a specific customer offer to report on.

Field	Description
Job	Select the type of communication record to display: ▪ All. ▪ Loyalty Events. ▪ Lost Loyalty Password. ▪ User Messages. ▪ Alarms. ▪ Support Emails. ▪ Debtor Statements. ▪ Franchise Event. ▪ Franchise Fee. ▪ Purchase Order Submit. ▪ Purchase Order Response. ▪ Purchase Order Requisition. ▪ Scheduler. ▪ Lay Buy. ▪ Micro Loan.
Offer	Select the offer to report on.

Report area

This area displays report information.

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

Field	Description
Site	Site the email or SMS originated from.
Job	Job that the email or SMS relates to. For example, a loyalty event.
Sent OK	Indicates whether the email batch was sent successfully.
Count	Number of emails or SMS messages sent in the batch.
Opt Out	Indicates whether the customer elected to opt-out of receiving further marketing material.
Units	The number of SMS messages sent.
Cost	The total cost of the SMS mail out.

Glossary

Account

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

Advertising label

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

Appointment (Scheduler)

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

Aged balance

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

Assistant (Scheduler)

An assistant is the staff member who performs a service for a customer. Assistants are not linked to Point of Sale operators or the Portal users.

Balance

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

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

Barcode

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

Batch (kit manufacture)

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

Batch (stock take)

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

Book (Scheduler)

A book is a main category of services available at your site. For example, a beauty salon may have hair services, nail services and skin-care services. The categories and contents of a book are not related to any product inventory in the Point of Sale or Portal.

Brand

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

Break (Scheduler)

The service's break is the period of time that the customer is required to remain on the site, but no staff member is actively required. For example, a hair dying service has a period of time where the customer must wait for the applied dye to set. A service's break time can overlap the duration or break time of another service scheduled for the same customer or staff member.

Bonus loyalty points

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

Bulk discount

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

Company

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

Complete Order

A customer order is complete when:

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

Contract

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

Controlled purchase order / Controlled requisition

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

Cost matrix / price matrix

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

A price matrix can be:

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

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

Credit adjustment

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

Credit limit

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

Credit note

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

Creditor

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

Creditor contract

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

Creditor payment

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

Cross-reference

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

Colour

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

Customer

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

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

Debtor

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

Debtor balance

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

Debtor contract

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

Debit adjustment

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

Delivery docket

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

Department

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

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

Department cost level

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

Department promotion

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

Discount

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

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

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

Per-unit discounts can:

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

Per-line discounts can:

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

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

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

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

Division

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

DSD

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

Duration (Scheduler)

A service's duration is the length of time the staff member is actively required for the service. For example, a hair dying service requires the staff member to apply the dye. A service's duration cannot overlap the duration of another service that is scheduled for the same customer or staff member.

Employee

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

Fashion

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

Family card

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

Feedback

Feedback is comments, complaints and suggestions from customers relating to their appointment. It can be recorded on the Appointment screen.

Fixture

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

Frequent shopper item

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

Gambling machine

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

Gambling session

A gambling session is a period of continuous gambling.

Gambling spin

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

Gambling venue

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

Global price change

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

Group promotion

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

Group purchase order

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

GSA card

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

Home delivery

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

Interest rate

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

Inventory

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

Invoice

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

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

Inter-branch transfers (IBT)

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

Item

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

- Barcode.

  Note: An item can have more than one barcode.

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

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

Item group

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

Item label

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

Item options

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

Item type

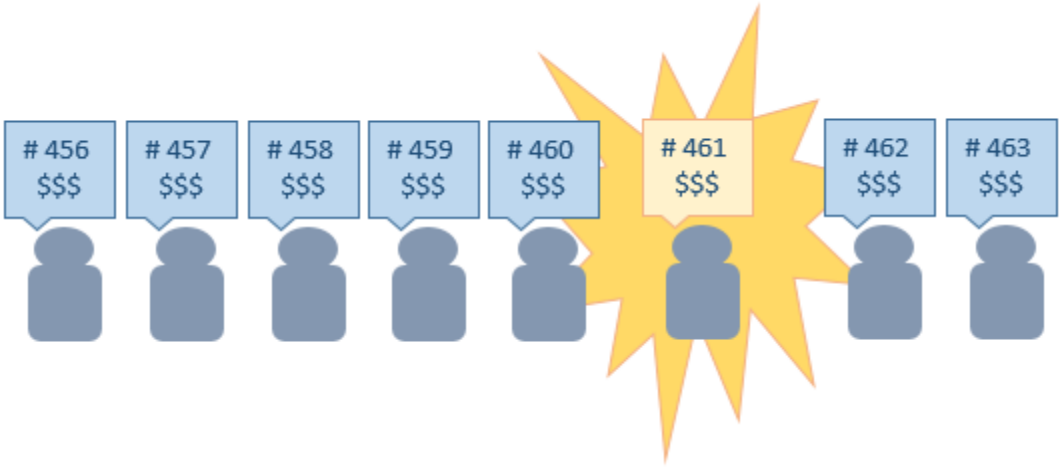
An item type is a way of categorising items for reporting purposes. Items can have only one type.

Item variation

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

Jackpot

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



Journal

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

Kit

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

Label

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

Layby

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

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

Loyalty

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

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

Loyalty is configured for your organisation on the Portal.

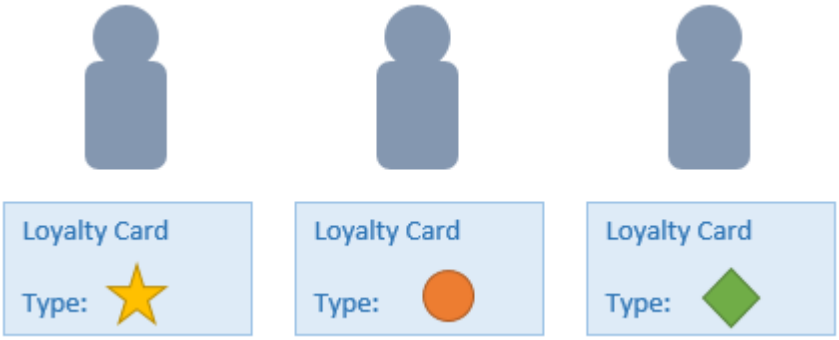
Loyalty card

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

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

Loyalty card type

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

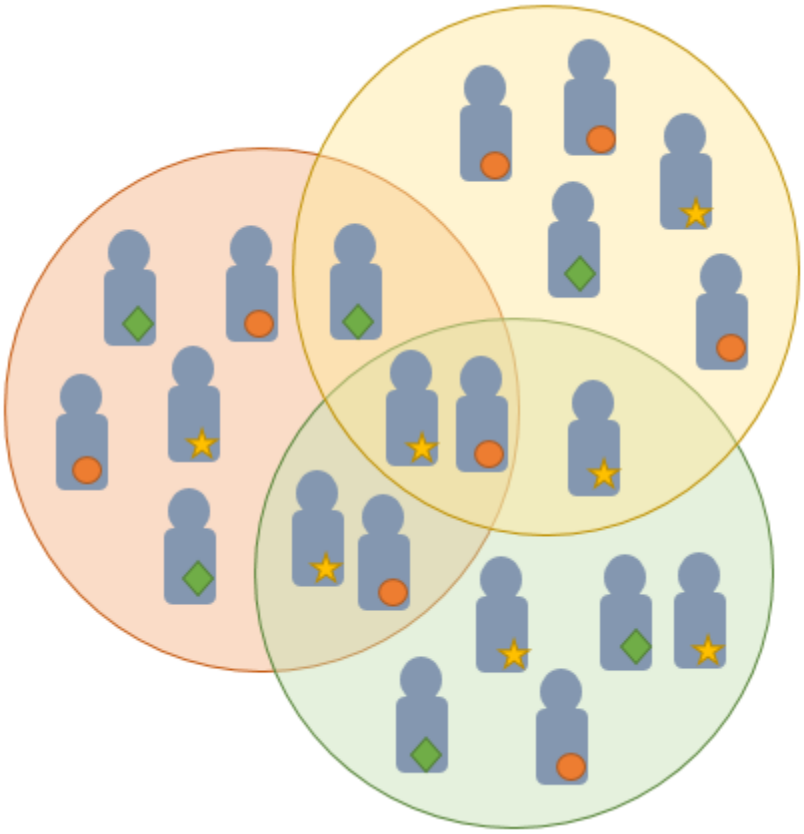


Loyalty department

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

Loyalty group

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



Loyalty points

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

Loyalty voucher

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

Ledger

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

Ledger type

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

Line minimum

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

Mail out

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

Manufactured Kit

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

Marketing member

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

Matching

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

Menu area

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

Modifier item

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

Offer

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

Open transaction

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

Operator

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

Pack

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

Pallet

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

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

Payment terms

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

PDT

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

PLU group

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

PLU Loyalty group

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

Portal Data Interchange (PDI)

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

Permission

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

Portal operator

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

Point of Sale operator

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

Point of Sale supervisor

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

Point of Sale Transaction

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

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

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

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

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

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

Price change

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

Price level

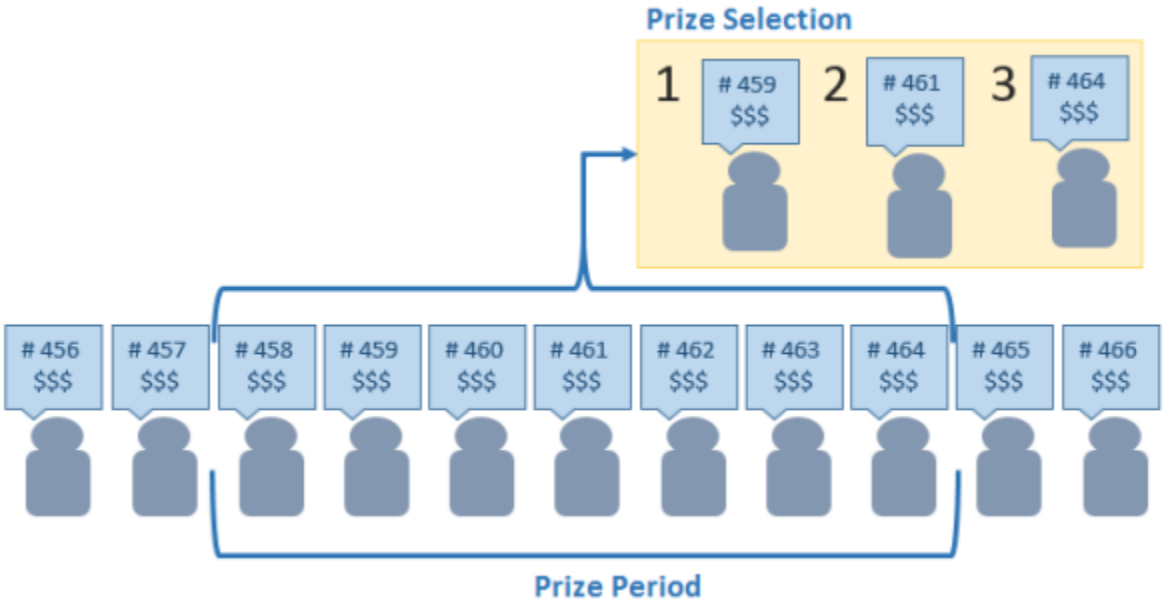
The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

Prime item

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

Prize

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



Procurement

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

Promotion

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

Promotion group

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

Purchase order

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

Quote

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

Rebate

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

Rebate group

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

Rebate item group

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

Receipt

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

Referral

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

Referred item

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

Requisition

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

Roster

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

Sale minimum

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

Scale label

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

Scheduler

The Scheduler runs separately to the Point of Sale to manage service appointments. It can link into the Point of Sale via the base station to process payments for those services in transactions.

Section (Scheduler)

A section is an optional sub-category within a book on the Scheduler. For example, a beauty salon may have a book for hair services, and within the book may have sections for colouring, cuts and styling.

Selling item

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

Service

A service is an activity performed by a staff member for a customer. Services must be scheduled to a specific date and time, and have a price, duration and break time. A staff member can only be scheduled for one service at a time, and a only one staff member can be allocated to a specific service.

Size

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

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

Shelf label

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

Snap count

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

Special

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

Statement

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

Stock adjustment / write-off

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

Stock item

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

Stock on hand

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

Stock receipt

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

Stock return

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

Stock take

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

Style

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

Supplier

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

Supplier promotion

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

Survey

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

Table booking

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

Table section

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

Table service

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

Terminal (iZen Point of Sale)

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

Time-slot (Scheduler)

A time-slot is a fifteen-minute period at a specific date or time, during which one service can be scheduled. Services may take more than one time slot, but two services cannot be scheduled for the same time slot, even if their combined duration is less than fifteen minutes.

Tipping

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

Tipping game

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

Tipping group

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

Tipping kiosk

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

Tipping round

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

Tipping team

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

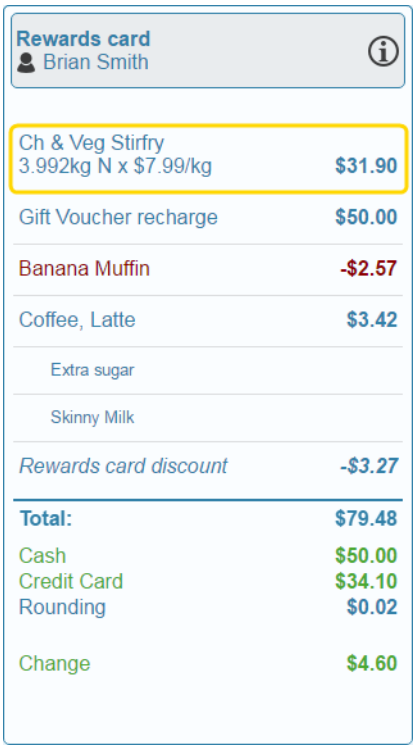
Team venue

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

Transaction line (iZen Point of Sale)

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

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



Turn-away (Scheduler)

A turn-away is a denial of service to a customer, either because you don't have the staff or resources available for the service they want, or because you cannot or will not provide the requested service to them. Turn-aways record the book and section of the requested service, and a brief explanation of why the customer was refused.

User account

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

Voucher

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

Voucher mask

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

Voucher type

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

Warehouse

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