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*(Voice) 845-920-0800 (Fax) 845-920-0880*

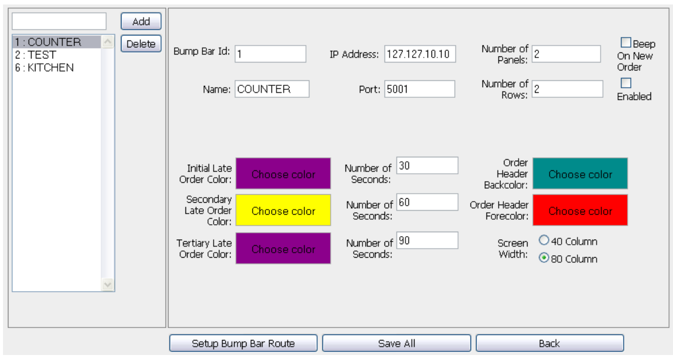
# POS Portal Usage Guide


pcAmerica's POS Portal makes remote management of stores possible wherever there is internet access. Users can configure bump bars, categories, departments, inventory items, kitchen printers, purchase orders, the touchscreen, and vendors for individual stores or groups of stores, order transfers between stores, generate reports, and manage employees, job codes, and the time clock.

This document will describe the different sections and functions of the POS Portal. Most screens are identical to those in CRE/RPE and documents on [http://faq.pcamerica.com](http://faq.pcamerica.com) that describe those screens will be referred to.

**Inventory Management → Bump Bars**

After selecting a store, you will be able to edit the bump bars at that store.




The screen that appears is the web version of the **Edit Bump Bars** screen, which is reached in CRE/RPE through the selection of the button of the same name on **page 2** of the **Hardware** tab of **Setup Screen**.

If you are unfamiliar with this screen, refer to the documents entitled **Kitchen video system** & **bump bar setup and usage guide**.

When you are finished, select **Save All**.

**Inventory Management → Categories**

After selecting a store or multiple stores, you will be able to configure the categories at the store(s).

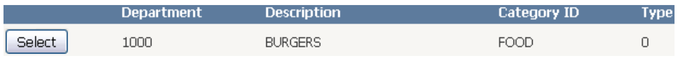

Selecting **Edit** will enable you to modify the description or external reference number of the category.

Selecting **Delete** will delete the category.


Selecting **Add Category** will allow you to create a new category.

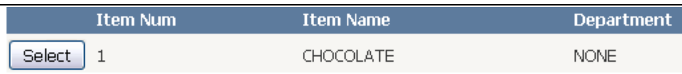
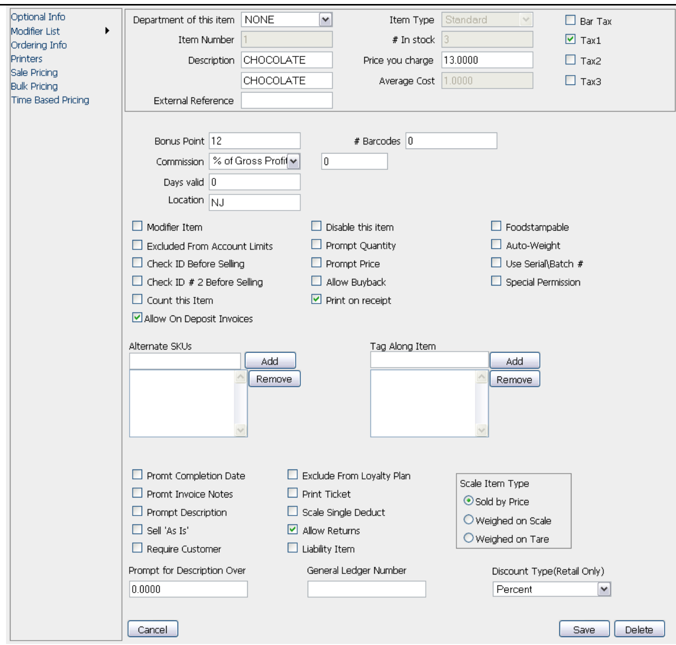
**Inventory Management → Departments**

After selecting a store or multiple stores, you will be able to configure the departments at the store(s).

| | |
|---|---|
|  | Change the settings of a department by selecting the **Select** button in line with that department. |
|  | Select **Add New** to create a new department. |
|  | After selecting a department and selecting **Edit** or selecting **Add New**, you will be given the same options provided to you in **Department Maintenance** in CRE/RPE.<br><br>If you are unfamiliar with these options, refer to the document entitled **Creating Departments**.<br><br>When you are finished, select **Update** or **Insert**. |

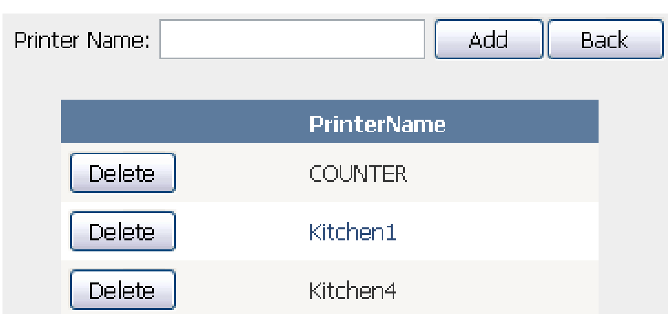
**Inventory Management → Items**

After selecting a store or multiple stores, you will be able to configure the inventory items at the store(s).

<table>
<tr>
<td>
</td>
<td>Change the settings of an inventory item by selecting the Select button in line with that item.</td>
</tr>
<tr>
<td>
</td>
<td>Select Add New Item to create a new inventory item.</td>
</tr>
<tr>
<td>
</td>
<td>After a selecting an item or choosing to create a new one (and selecting an item type), you will be presented with the same options as can be found in Inventory Maintenance in CRE/RPE.<br><br>If you are unfamiliar with these options, refer to the document entitled Inventory Maintenance.<br><br>When you are finished, select Save.</td>
</tr>
</table>

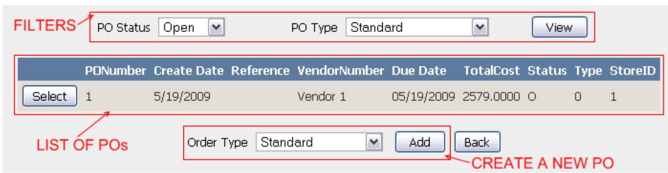
**Inventory Management → Kitchen Printers**

After selecting a store, you will be able to add and remove kitchen printers at that store.

<table>
<tr>
<td>
</td>
<td>Type the name of a new printer and select Add to add it.<br><br>Select the Delete button in line with the printer name in order to delete that printer.</td>
</tr>
</table>

**Inventory Management → Purchase Orders**

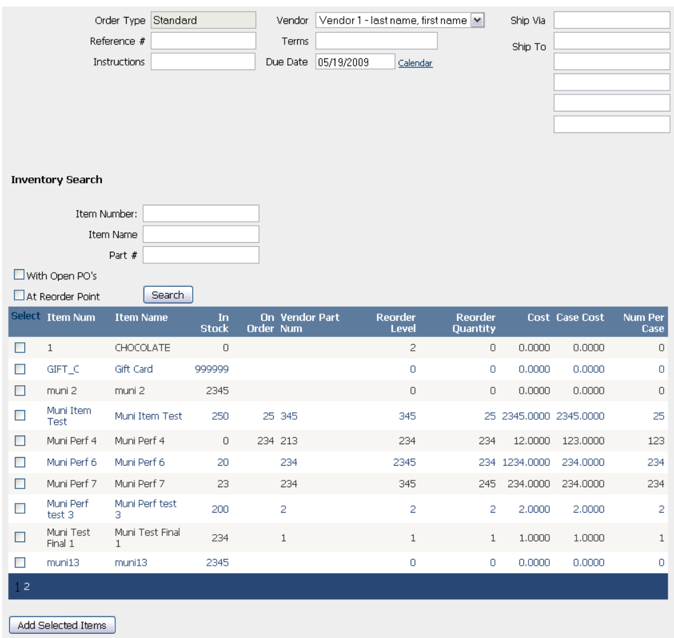
After selecting a store, you will be able to create and modify purchase orders for that store.



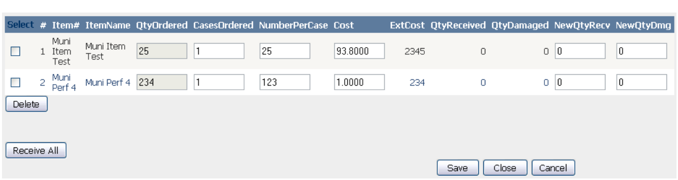

Like the **Purchase Orders** screen in CRE/RPE, purchase orders that comply with the filters will be displayed.

You can select a PO by selecting the **Select** button in line with that PO.

You can also create a new PO by selecting an order type and then the **Add** button.




When a purchase order is selected or created, items can be added to it as they are in the **Purchase Orders** screen in CRE/RPE.




When an open purchase order is selected, parts of it can be received.

Select **Receive All** to mark all items as received, select **Close** to close the purchase order, and select **Save** when you are finished making changes.

**Inventory Management → Touchscreen Configuration**

After selecting a store, you will be able to configure that store's touchscreen.

| | Index | Caption | Function | Option1 | Visible |
|---|---|---|---|---|---|
| Edit | 0 | GIFT CARD | Open Cash Drawer | | ☑ |
| Edit | 1 | HOT DOG | Time Clock | HSAND9 | ☑ |
| Edit | 2 | HOT PASTRAMI | Open Discount Amount | HSAND2 | ☐ |
| Edit | 3 | HOT CORNED BEEF | Fixed Item | HSAND1 | ☑ |
| Edit | 4 | TURKEY SANDWICH | Fixed Item | CSAND4 | ☑ |
| Edit | 5 | CHICK MATZ SP | Fixed Item | APP12 | ☐ |
| Edit | 6 | POTATO KNISH | Fixed Item | APP6 | ☑ |
| Edit | 7 | PEPSI | Fixed Item | DRINK1 | ☐ |
| Edit | 8 | FLASH REPORT | Total Sales for Today | | ☑ |
| Edit | 9 | TIME CLOCK | Time Clock | | ☑ |
| Edit | 10 | REORDER ROUND | None | | ☑ |
| Edit | 11 | COMP ITEM | Time Clock | 1234 | ☐ |
| Edit | 12 | Recall Order | Recall On-Hold Invoice | | ☑ |
| Edit | 13 | MUSTARD | Fixed Item | TOP3 | ☐ |
| Edit | 14 | RUSSIAN | Fixed Item | TOP1 | ☐ |
| Edit | 15 | MAYO | Time Clock | TOP2 | ☑ |

You will be able to configure the hot buttons by selecting the **Edit** button.

Hot buttons 0 through 7 are on the top row from left to right. Buttons 8-15 are on the bottom row from left to right.

Refer to the document entitled "Creating a hot button" for a description of your choices of hot buttons.

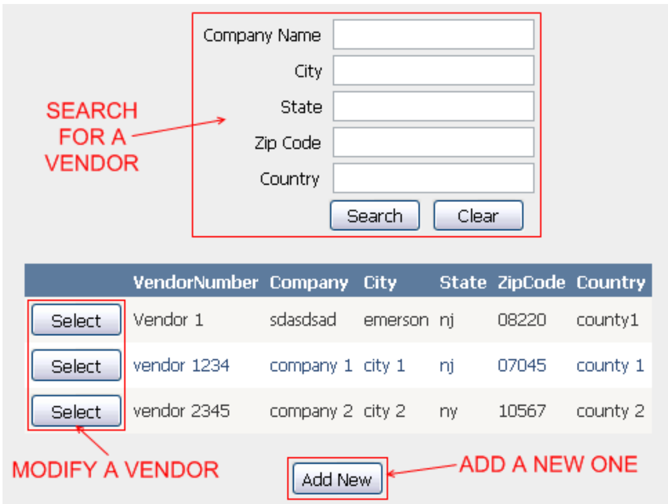

Select **Items & Departments** in order to decide which departments and items will be displayed on the touchscreen. You will also be able to pick the color of the buttons that appear.

The screen that appears is the web version of the **Items & Departments** tab of **Touch Screen Configuration**.

Select **Save** when you are finished making changes.

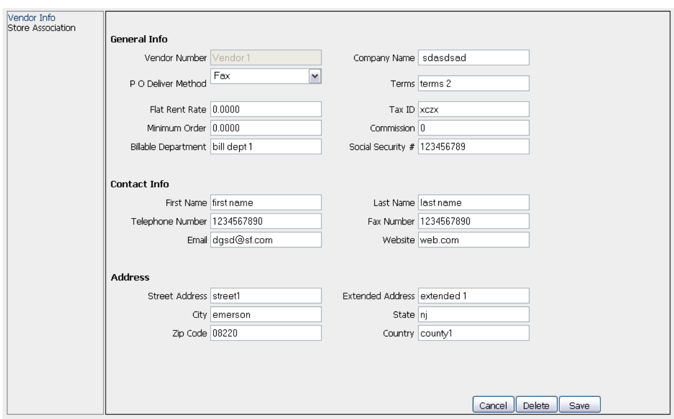
**Inventory Management → Vendors**

Here you can add, modify, and delete vendors.




Select a vendor by selecting the **Select** button in line with it.

Add a vendor by selecting the **Add New** button.




After selecting a vendor or choosing to create a new one, modify or provide information for the appropriate fields.

This screen resembles **Vendor Maintenance** in CRE/RPE.

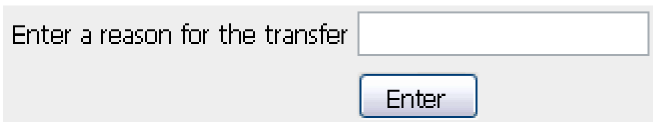
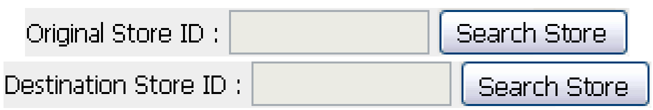
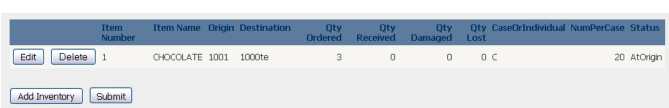
Refer to the document entitled “Vendors and purchase orders” for descriptions of the fields.

Select **Save** when you are finished.

**Inventory Management → InventoryOrder (Item Transfer)**

Here you can arrange the transfer of inventory items between stores from the software end.

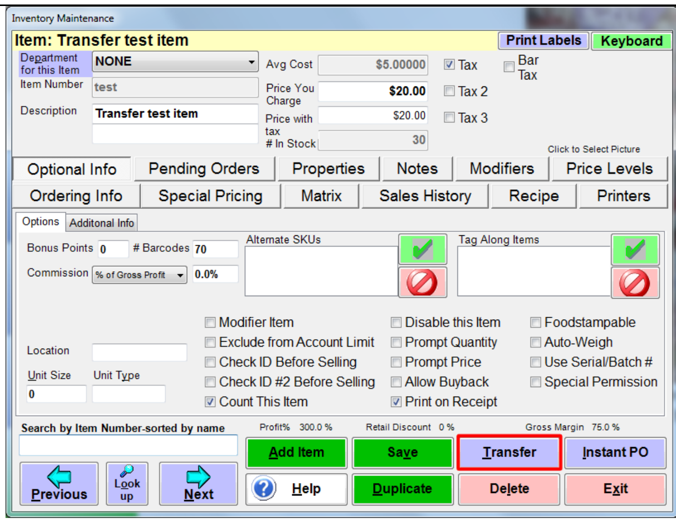
> **Note**: Item transfers can only be configured through the web portal, and they must be received at the store level.
>
> **Note**: Item transfers can only be done if the inventory exists (with matching inventory numbers and descriptions) at both the original store and destination store.

<table>
<tr>
<td>
</td>
<td>First you must provide a reason for the transfer and select Enter.</td>
</tr>
<tr>
<td>
</td>
<td>Next you must select an original store and a destination store.</td>
</tr>
<tr>
<td>
</td>
<td>Next you must select Add Inventory and select an inventory item that is being transferred.<br><br>It is recommended to check that the inventory exists at both locations (Original Store ID and Destination Store ID) with matching item numbers as well as matching descriptions.</td>
</tr>
<tr>
<td>
</td>
<td>Finally you must decide whether you are transferring the items in cases or individually. You will be asked for the number of items or cases and the number of items per case.</td>
</tr>
<tr>
<td>
</td>
<td>You will be given the opportunity to add more items to the transfer and edit or delete existing items.</td>
</tr>
</table>

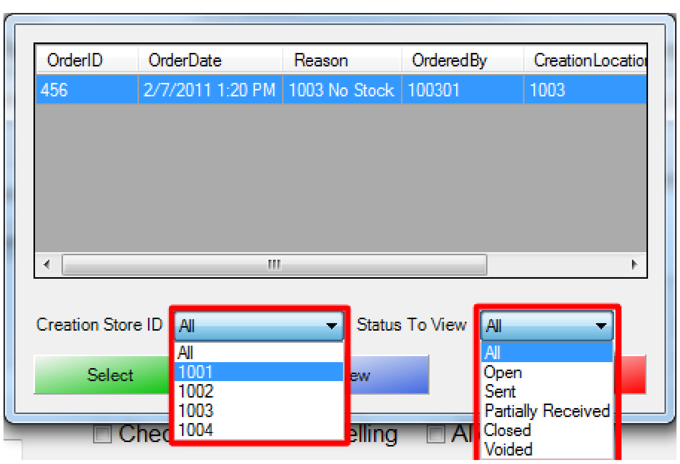
## Receiving Inventory From an Inventory Transfer

**Note**: This section will need to be performed at the store level receiving the inventory.


1. Select **Administrative** and then **Inventory Maintenance**.




2. Select **Transfer**.

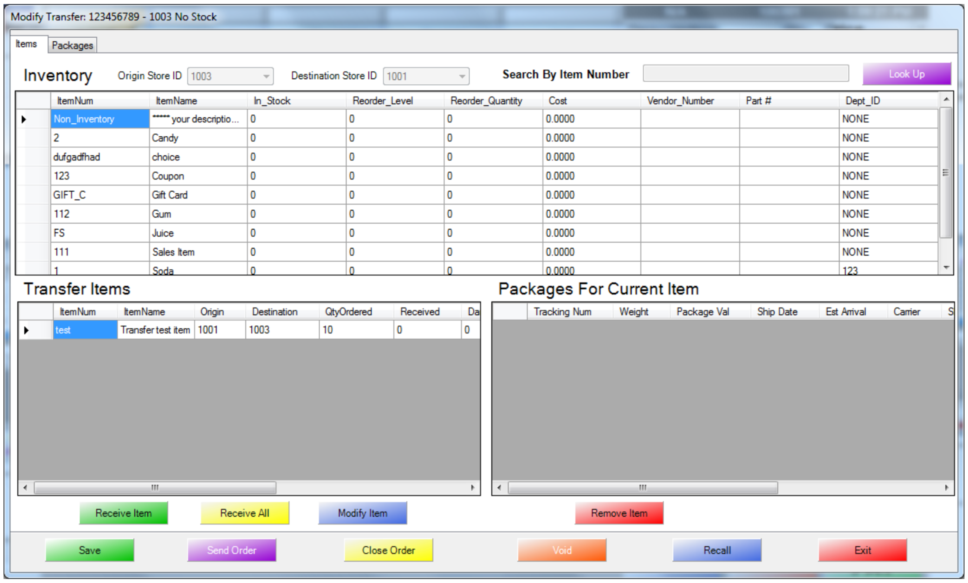



3. At this window we will need to select the store ID that the inventory is being sent from under **Creation Store ID**. This will only show the store ID at your location as well as any store ID's that have sent inventory to this location.

4. For **Status to View** use the dropdown to select the status of the transfer (for example, **Sent**).

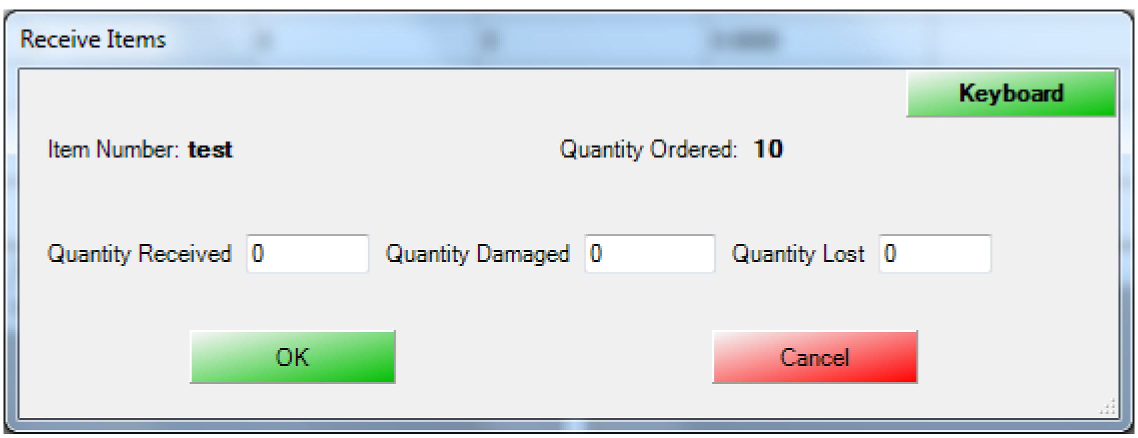
**Note**: Use the dropdowns to filter results.

5. Highlight the Transfer you would like to receive and select, **Select**.

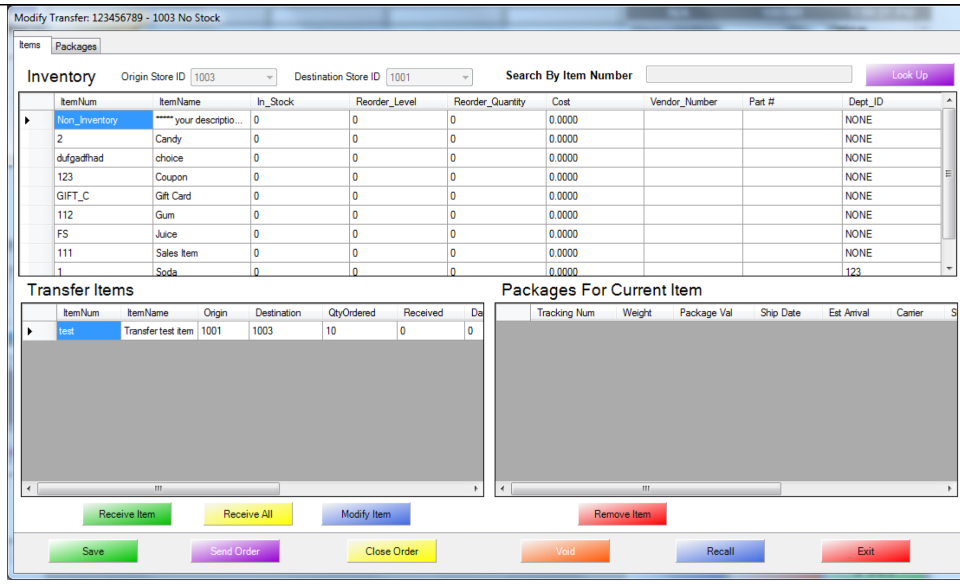



6. To receive every item in the transfer at once, select **Receive All**.

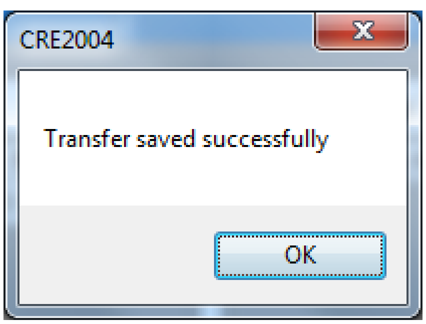
7. To receive items individually select Receive Item (or Double-click an item in the Transfer Items list).




8. At the Receive Items window enter the following information:
   - Quantity Received
   - Quantity Damaged
   - Quantity Lost
9. When done select **OK**.




10. To complete the transfer select **Close Order** then select **Save**.




11. Select **OK**, then select **Exit**.

**Store Management → Store Groups**

Here you can create, add and remove stores to and from, and delete store groups.

<table>
<tr>
<td>
</td>
<td>To edit the description of a store group, select the Edit button in line with that store group.<br><br>To delete a store group, select the Delete button in line what that store group.<br><br>To add and remove stores from a store group, select the Select button in line that that store group.</td>
</tr>
<tr>
<td>
</td>
<td>After selecting a store group, you can delete a store by selecting the Delete button in line with that store.  The list of stores will appear to the right of the list of store groups.</td>
</tr>
<tr>
<td>
</td>
<td>You can add a store by selecting Add new store and selecting one.</td>
</tr>
<tr>
<td>
</td>
<td>To add a new store group, select Add new group and provide an ID and description.</td>
</tr>
</table>

**Reporting → Employee**

Pay close attention to the information required to generate these reports and the information that you can provide to make the reports more interpretable.

| |
|---|
| The **Cash Pickups** report lists all cash pickups, broken down by store, date, and cashier. Each listing contains the date and time, amount picked up, and station ID. Cashier, daily, store, and grand totals of all pickups are calculated. |
| The **Commissions** report lists the commissions earned by each salesperson. Each listing contains the date and time, invoice number, price, and commission. The grand total for each salesperson is also calculated.<br><br>Commissions can be configured in Inventory Maintenance and **Prompt Salesperson** must be checked in the **Invoice Settings** tab of **Setup Screen**. |
| The **Hours and Wages** report lists information about the shifts worked by each employee, including the length of paid and unpaid breaks. For each employee, their regular and overtime wages, sales, tips, and wages earned are provided. |
| The **Employee Listing** report lists the ID, name, address, city, state, zip code, and telephone number of every employee. |
| The **Invoice Exception** report contains a list of actions that triggered exceptions as well as the invoice number, item number, cashier ID, amount, and quantity associated with that action. The list is broken down by store ID and date.<br><br>Invoice exceptions can be configured in the **Invoice Settings** tab of **Setup Screen**. |
| The **Labor Cost** report lists, for each day, the total sales, labor hours, labor wages, and the “labor cost percentage,” which is the labor wages divided by the total sales, multiplied by 100. |
| The **Operational Exception** report contains a list of forbidden actions attempted by employees along with the date and time that the actions were attempted. Exception logging must be turned on in **Employee Maintenance** or **Job Code Setup** (see Permissions). |
| The **Payroll Hours** report lists, for each store, the number of hours worked by each employee on specific days (if details are included) and in total. |
| The **Payroll Hours by Store** is the same as the **Payroll Hours** report, except the information is broken down by store group. |
| The **Sales By Rep Summary** report lists the salespersons in each store along with their total sales and commissions. |
| The **Store Status** lists each store’s upload status, download status, and number of negative stock items. Additionally, the dates of the last physical inventory count, cycle count, direct store delivery, and adjustment at each store are provided. |
| The **Tips** report lists, for every invoice, a date and time, grand total, and tip amount. |

**Reporting → Inventory**

Pay close attention to the information required to generate these reports and the information that you can provide to make the reports more interpretable.

| |
|---|
| The **Controllers End Stock** report lists, for each store, all items (number, name, vendor part number) and the quantity in stock at the beginning of the time period, the cost and value (cost multiplied by quantity) at that time, and the same at the end of the time period. |
| The **Controllers End Stock by StoreGroup** report is the same as the **Controllers End Stock** report, except the stores themselves are grouped together by store group. |
| The **Controllers Receipts Report** lists all items along with information about purchase orders that contained those items, including (case) quantities ordered and received, quantity per case (if applicable), and the quantities that were received and damaged. |
| The **InvCostOnHand** report lists, for each store, the cost of on-hand inventory, and the cost of inventory in shortage. |
| The **Inventory Adjustments** report lists, for each reason code, the date and time of the adjustment, clerk ID and name, quantity, item number and description, and the dollar value of the item. |
| The **Inventory Item Activity** report lists all items, broken down by department. Each listing contains the item number and name, store ID, current stock, opening stock, closing stock, and accounts for the activities that resulted in the change in stock level. |
| The **Inventory Item Activity by Name** report is the same as the **Inventory Item Activity** report, except the items are sorted by name. |
| The **Inventory Item Activity Extended** report is the same as the **Inventory Item Activity**, except it distinguishes between purchase orders and transfers. |
| The **Inventory List** report lists all items, broken down by department, with their item number and description, cost, quantity in stock, value (cost multiplied by quantity), and price. |
| The **Inventory List By Store** report is the same as the **Inventory List** report. |
| The **Inventory Movement** report is the same as the **Inventory Item Activity Extended** report, except the value (cost multiplied by quantities) of opening and closing stock are included. |
| The **Inventory Sales Summary** report allows you to view the total monthly sales of a particular item during a particular year. |
| The **Pending Orders Item Details** report contains all information contained in the **Pending Orders** report, except the item number is provided, a customer cannot be selected, and the report can be generated for individual items. |
| The **Pending Orders** report lists the items in each department that are scheduled to be picked up during the date and time range of the report.  The due date, invoice number, and customer information are provided.<br><br>“Pending orders” are created when items with “Prompt Completion Date” checked within Inventory Maintenance are sold. |

| |
|---|
| The **Purchase Order** report brings up a purchase order of your choice. |
| The **Receive Reconciliation** report lists items (their number and description) that were received, the number that were damaged, the delivery number, and source company. |
| The **Receive Reconciliation By Store** report is the same as the **Receive Reconciliation** report, except the items are broken down by store. |
| The **Reorder Report** lists all items with stock levels less than or equal to their reorder level, as set in the **Ordering Info** tab of **Inventory Maintenance**. For every item that is listed, the item's number, name, department, store ID, cost, stock level, value (stock level multiplied by cost), price, vendor part number, reorder level, and reorder quantity is provided. |
| The **Top Sellers** report lists the top selling items. Each listing contains the item number and name, quantity sold, and value sold. You can choose how many top selling items to list. |
| The **Top Sellers By Store** report is the same as the **Top Sellers** report, except the top sellers in each store are listed. |
| The **Vendor Listing** report lists all vendors. Each listing contains the vendor number, contact name, company name, address, and phone and fax numbers. |

**Reporting → Sales**

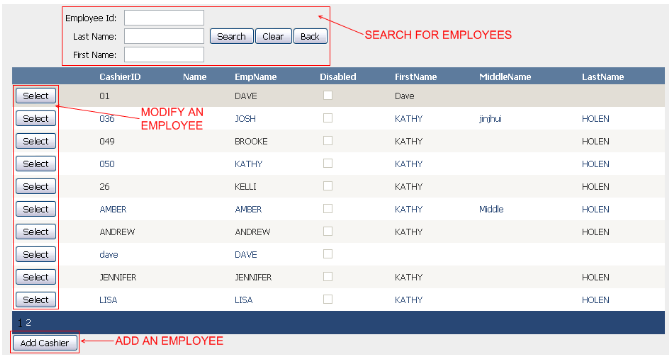
Pay close attention to the information required to generate these reports and the information that you can provide to make the reports more interpretable.

| |
|---|
| The **Controllers Sales Report (No Shifts)** contains, for each store, sales totals that are broken down by payment type, taxes collected, vendor payouts, payments made, net sales, discounts applied, and gross sales. |
| The **Daily Totals** report lists, for each store, the cost and price of items sold, the taxes collected, the grand total collected, and the gross profit on individual days. |
| The **General Hourly Report** contains the number and total price of items sold from every department as well as the amount of money collected during each hour. |
| The **Invoice Total** report contains a list of invoices, all either completed, on hold, or voided (you choose this prior to generation), with the date and time, store ID, invoice number, customer number, cashier ID, payment method, total cost, total price, taxes applied, grand total, and gross profit provided for each one. The list of invoices is broken down by date. |
| The **Invoice Total By Customer** report lists, for each customer, the invoices closed to that customer. Each listing contains the invoice number, date and time, total price, and grand total. |
| The **Payout Report** contains information about vendor payouts. For every payout, the cashier ID, payment method, description of the payout, vendor number and name, and amount is listed. |
| The **Product Mix** report lists all the items (number and name) in each department that were sold or returned (you choose which) along with the vendor part number, location, quantity sold or returned, and the price of those items. |
| The **Product Mix By Store** report is the same as the **Product Mix** report, except the items are broken down by store in addition to department. |
| The **Receipt Listing** report contains the information on every receipt for every completed or voided invoice (you choose this prior to generation). |
| The **Returns [Basic]** report lists all returned items. Each listing contains the item's number, description, vendor part number, cost, and price, the invoice on which the item was returned, the quantity of the item returned, and the amount paid to the customer. |
| The **Returns [Itemized]** report lists all returned items. Each listing contains the invoice on which the item was returned, the name and number of the item, the quantity returned, the invoice on which the item was sold, the vendor name and number, the vendor part number, the cost of the item, cashier ID, and the reason for the return. For this report to be useful, return logging must be turned on. See the **Invoice Settings** tab of **Setup Screen**. |

| |
|---|
| The **Sales By Vendor** report lists all items with associated vendors that were sold.  This list is broken down by category.  The quantity sold and prices charged on individual days, from each category, and in total are provided. |
| The **Sales by Zip Code** report contains a listing of zip codes and, for each zip code, the number of customers from that zip code and the total sales to those customers. |
| The **Shift Summary By Clerk** report contains information about employees' shifts, namely their cashier ID, the opening drawer amount, the total sales they made (also broken down by payment type), the total account payments that were made during their shift, the total vendor payouts they made,  the amount in the drawer at closing (as reported by the employee), and the discrepancy (if any).<br><br>This report is only useful if shift tracking is turned on (**Time Clock** tab of **System Access** tab of **Setup Screen**) and an employee's job code has **Cash Bank** enabled. |
| The **Shift Summary By Date** report is the same as the **Shift Summary By Clerk** report, except shifts are tied to the date and not cashiers clocking in and out. |

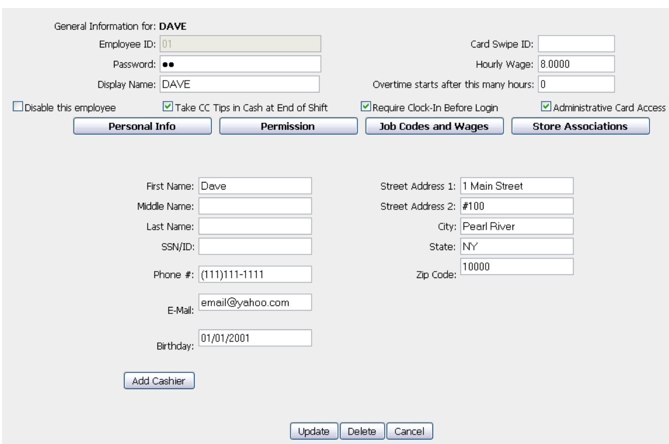
**Employee Management → Employee Maintenance**

After selecting a store or group of stores, you will be able to create, disable, and modify employees at those stores.




Select an employee by selecting the **Select** button in line with that employee.

Select **Add Cashier** to create a new employee.




The screen that appears when modifying an employee or creating a new one is the web version of **Employee Maintenance**, an important area of CRE/RPE.

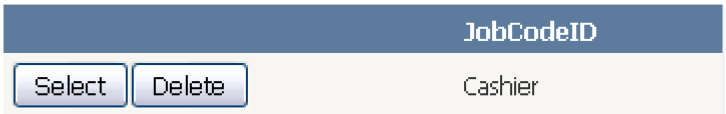
For information about the options here, refer to the documents entitled “Creating Employees”, “Employee Permissions (CRE)”, and “Employee Permissions (RPE)”.

Selecting **Store Associations** will allow you to associate this employee with multiple stores so that they can work at all of them.

Select **Update** or **Add** when finished or **Delete** if you wish to delete the employee that you are modifying.

**Employee Management → Job Codes**

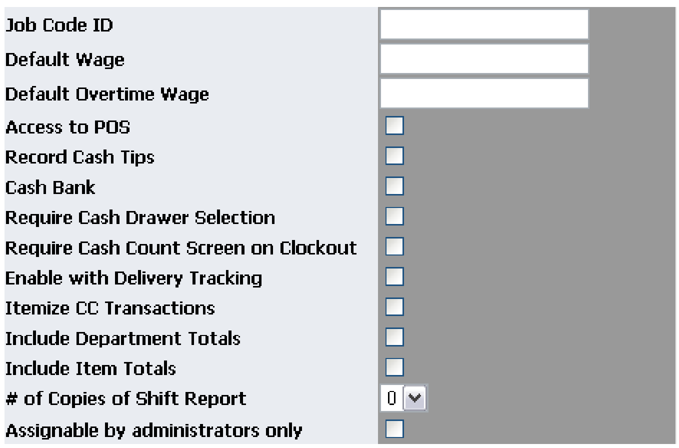
Here you can create, modify, and delete job codes.




Select the **Select** button in line with a job code in order to edit that job code.

Select the **Delete** button to delete that job code.


Select **Add New Job Code ID** to create a job code.

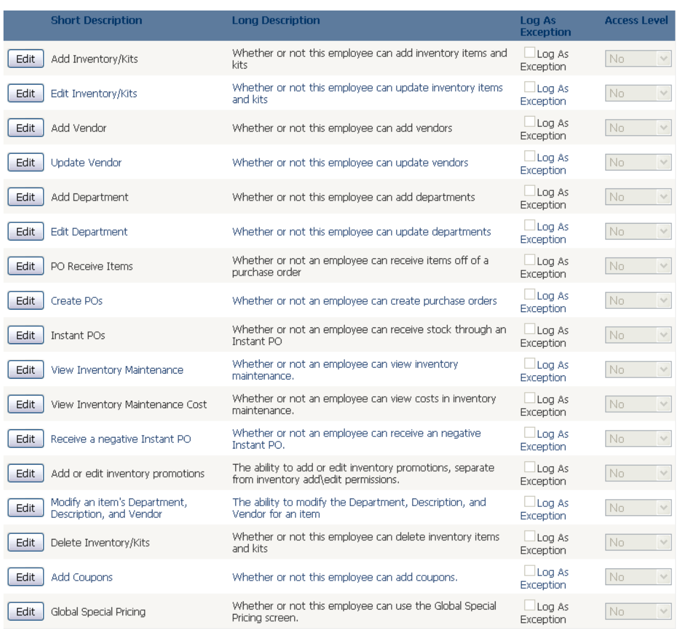



After selecting **Select** and **Edit** or **Add New Job Code ID**, you will be presented with various options.

These options are the same as those that are offered in CRE/RPE's **Job Code Setup**.

Refer to the document entitled "Job Code Setup" if you are unfamiliar with these options.

Select **Update** or **Insert** when finished.

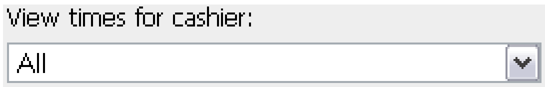
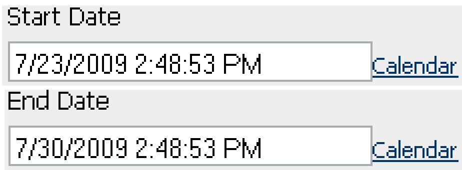



After selecting **Select** and **Edit**, you will be given the opportunity to change the permissions associated with the current job code.

If you are unfamiliar with the permissions, refer to the documents entitled "Employee Permissions (CRE)" and "Employee Permissions (RPE)".

**Employee Management → Time Clock Management**

After selecting a store, you can view the time clock records of that store.

| | |
|---|---|
|  | Select a particular cashier or choose “All”. |
|  | Select start and end dates. |
|  | Select **Refresh** to view all time clock records that meet the criteria. |