

Self Check In Mode Configuration Guide

Cash Register Express

Please enter your ID or
swipe your card

		.
7	8	9
4	5	6
1	2	3
Delete	0	Enter

Self Check in mode Manager Help Exit

FRESH LOCAL PRODUCE

Click on the image to cycle through a selection of pictures. You can choose your own through the 'Display Settings'

JZON SALON
Station: 01
6/15/2018
3:17:29 PM

This document provides step-by-step instructions on configuring the Self Check in for CRE.

You must be on version 12.8042 or higher to use this feature.

Note: Must configure self check in using CRE. Feature is only available with the retail store business type.

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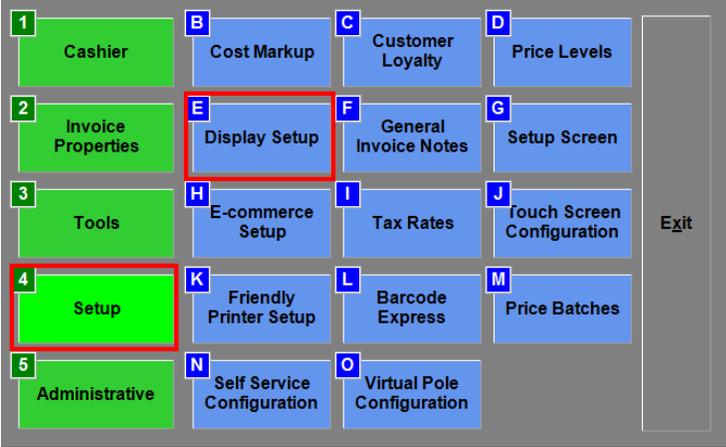
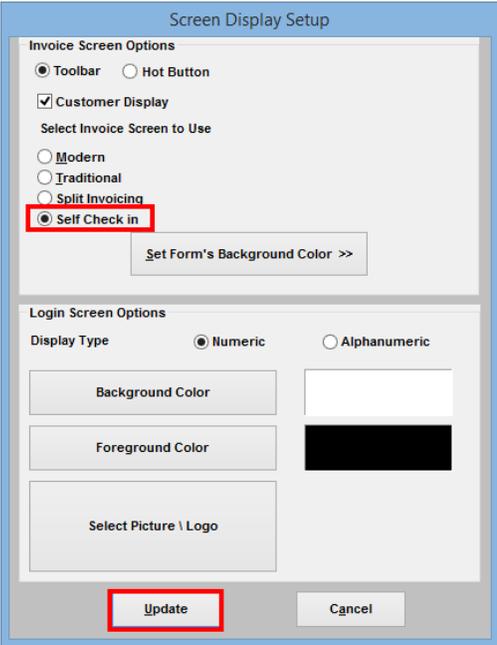
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Revision History

Document Version	Date	Author	Description of Changes
1.0	6/29/2018	JC	Internal Release

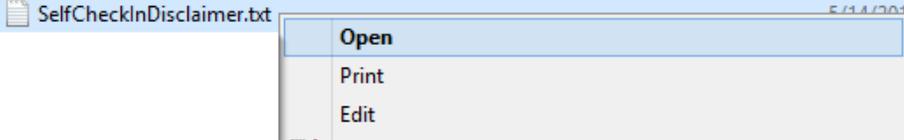
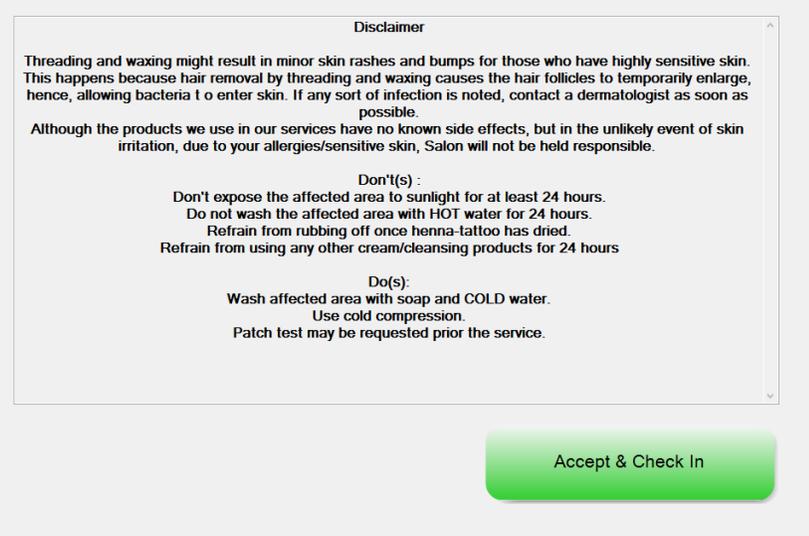
Configure CRE for Self Check In:

Configuring CRE to use the Self Check in feature is as follows.

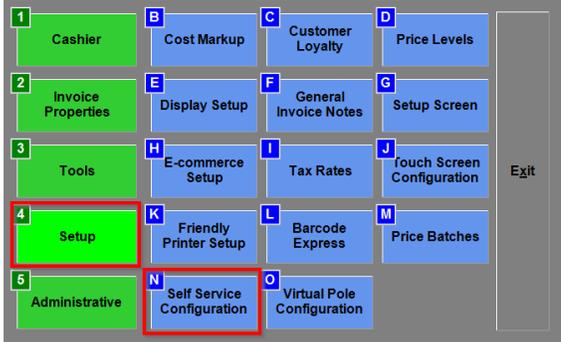
 <p>The image shows a yellow box labeled "Manager" above a blue box labeled "Options".</p>	<ol style="list-style-type: none">1. With CRE open select the Manager or Options button. Enter the Administrative ID & password.
 <p>The image shows a grid of menu items. The "Setup" button is highlighted with a red box and labeled with a green "4". The "Display Setup" button is also highlighted with a red box and labeled with a blue "E". Other buttons include Cashier, Invoice Properties, Tools, Administrative, Cost Markup, E-commerce Setup, Friendly Printer Setup, Self Service Configuration, Customer Loyalty, Tax Rates, Barcode Express, Virtual Pole Configuration, Price Levels, General Invoice Notes, Touch Screen Configuration, Price Batches, and Setup Screen. An "Exit" button is on the right.</p>	<ol style="list-style-type: none">2. Select Setup [4] followed by Display Setup [E].
 <p>The image shows a "Screen Display Setup" dialog box. Under "Invoice Screen Options", the "Self Check in" radio button is selected and highlighted with a red box. Under "Login Screen Options", the "Numeric" radio button is selected. The "Update" button at the bottom is also highlighted with a red box.</p>	<ol style="list-style-type: none">3. Select Self Check in. Then Select Update. Exit back to the login screen.
 <p>The image shows a yellow banner with the text "Self Check in mode".</p>	<ol style="list-style-type: none">4. Login screen should now display a new button.

Adding disclaimer Information to the Disclaimer file

For the disclaimer panel to show the custom disclaimer information. You must paste that information into the self check in disclaimer file. Follow the steps below. **Please do this while the program is closed.**

	<ol style="list-style-type: none">1. Locate the SelfCheckInDisclaimer.txt, in your CRE.NET folder. 64 bit C:\Program Files (x86)\CRE.NET 32 Bit C:\Program Files\CRE.NET
	<ol style="list-style-type: none">2. Right Click, Open file (should be notepad). If asked “open with” you can use any text editor. (Make sure the name and extension stays the same.)
	<ol style="list-style-type: none">3. Add your disclaimer information you would like your customers to accept when using the self check in feature. Save file, replacing the existing file. All text is centered in the panel.
	<ol style="list-style-type: none">4. Example, Disclaimer Panel from step 3.

Self Check in Configuration

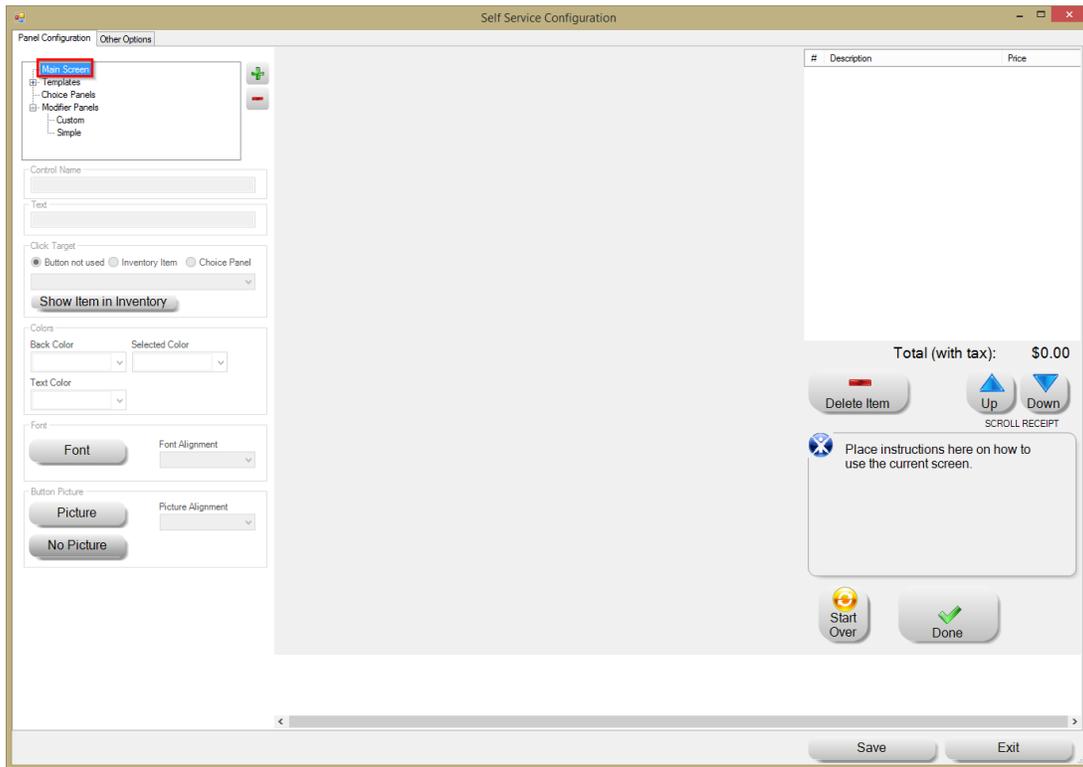
<div style="text-align: center;">  <p>The flowchart shows a yellow box labeled 'Manager' with an arrow pointing down to a blue box labeled 'Options'.</p> </div>	<ol style="list-style-type: none"> 1. Open CRE select the Manager or Options button. Enter the Administrative ID & password.
<div style="text-align: center;">  <p>The menu grid contains the following items:</p> <ul style="list-style-type: none"> 1 Cashier 2 Invoice Properties 3 Tools 4 Setup 5 Administrative B Cost Markup C Customer Loyalty D Price Levels E Display Setup F General Invoice Notes G Setup Screen H E-commerce Setup I Tax Rates J Touch Screen Configuration K Friendly Printer Setup L Barcode Express M Price Batches N Self Service Configuration O Virtual Pole Configuration Exit </div>	<ol style="list-style-type: none"> 2. Select Setup [4] followed by Self Service Configuration [N].

When configuring the self check in screens (the screens that the customer will see when placing their order), we must customize the following:

Main Screen Configuration - This is the background screen for all of the panels. The main screen holds the important information pertaining to the invoice such as:

- Invoice readout - This will show the customer everything that has been added to the order, as well as the total that they owe (with tax included).
- Invoice Options - These options will allow customers to delete items off of the invoice as well as move them up and down on the invoice.
- Order Options - These options will allow the customer to cancel the item currently being ordered, start the complete order over and complete the order.
- **Template Configuration** - Templates are a way to create a predefined layout, when new panels are created they will use the options you specified for the template. There are two types of templates that can be created:
 - **Template Configuration – Choice Template** - Choice templates are the templates used when creating new Choice Panels, where the customer will select the departments and items in the departments.
 - **Template Configuration – Modifier Template** - Modifier templates are templates used when creating new Modifier Panels.
- **Creating New Choice Panels** - Choice Panels are the main screens where the customer will select the departments and items in the departments.
- **Modifier Panels** - Modifier Panels are used if an item selected from a choice panel has modifiers or modifier groups attached to it.
 - **Modifier Panels – Custom** - Custom modifier panels display up to 6 uniform buttons per page. A change to one button's properties will change all of the buttons on the page.
 - **Modifier Panels – Simple** - Simple modifier panels display up to 20 uniform buttons per page. A change to one button's properties will change all of the buttons on the page.

Main Screen Configuration



1. Select **Main Screen** under **Panel Configuration**.

Note: The following is editable on the **Main Screen**:

- **All buttons** (including, images, color, and caption)
- **Totals labels**
- **Background color**

2. To edit a section, double-click an empty area of the section (i.e. background). Depending on what kind of control you clicked, and what type of panel you are editing, the editable options vary. The options that are not valid will be disabled and you will be unable to edit them.



3. To edit a particular button or caption, select the control (button) then use the options on the left side to edit it. The options that are not valid will be disabled and you will be unable to edit them.
4. Select **Save** when finished.

Control Name
btnDone

Text
Done

Click Target
 Button not used Inventory Item Choice Panel
▼
Show Item in Inventory

Colors
Back Color Selected Color
Silver ▼ ▼
Text Color
Black ▼

Font
Font Font Alignment
BottomCenter ▼

Button Picture
Picture Picture Alignment
MiddleCenter ▼
No Picture

The following are the buttons maximum pixel dimensions, if you will be using images in place of buttons:

- The **Delete** button – 125x54 pixels.
- The **Up** and **Down** buttons – 60x60 pixels.
- The **Done** button – 127x71 pixels.
- The **Information** button – 32x32 pixels.
- The **Cancel Item** and **Start Over** buttons – 63x71 pixels.

Template Configuration

Templates can be edited to set default fonts, sizes and alignments, text, button and background colors and/or pictures. There are two types of templates that can be created:

Choice Template - Choice templates are the templates used when creating new Choice Panels, where the customer will select the departments and items in the departments.

Modifier Template - Modifier templates are templates used when creating new Modifier Panels.

When you add a new Choice panel or Modifier panel, these defaults that you created will be used.

Template Configuration – Choice Template

There are 2 types of templates: Choice and Modifier. The Choice template can be edited to set default fonts, sizes and alignments, text, button and background colors and/or pictures. When you add a new Choice panel, these defaults that you created will be used.



1. Select **Templates** then **Template Choice Panel** under **Panel Configuration**.

Note: The following is editable on the **Template Choice Panel**:

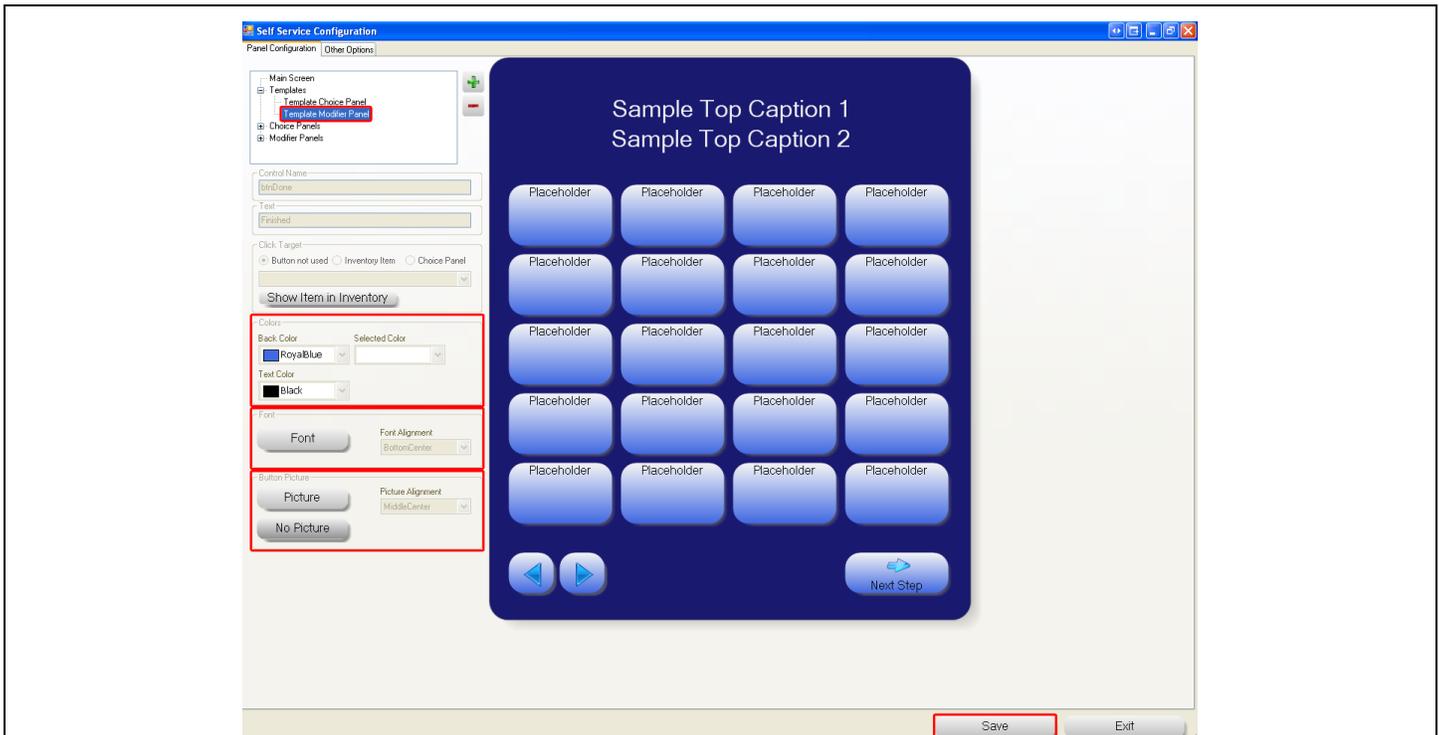
- **All buttons** (including images, font, color, and caption)
 - **Font**
 - **Logo**
 - **Background color**
2. To edit a button simply select the button in question and use the options on the left to edit it. The edits for the buttons include changing the buttons color, the font of the text and, adding a picture of your item.

The following are the buttons maximum pixel dimensions, if you will be using images in place of buttons:

- The **Placeholder** buttons – 162x102 pixels.
 - The **Left** and **Right** buttons – 60x60 pixels.
3. To edit the background color, or the logo, simply select an area of the background and, use the controls on the left, to make any changes.
 4. To edit the Top Caption 1, simply select the text. Using the controls on the left, make any changes.
 5. Select **Save**.

Template Configuration – Modifier Template

When an item has a modifier group attached to it, the program will automatically create a “Simple” Modifier screen based on the template you have setup. You can override this behavior on a group, per item basis by adding a modifier panel manually.



6. Select **Templates** then **Template Modifier Panel** under **Panel Configuration**.

Note: The following is editable on the **Template Modifier Panel**:

- **All buttons** (including images, font, color, and caption)
- **Font**
- **Background color**

7. To edit a button simply select the button in question and use the options on the left to edit it. The edits for the buttons include changing the buttons color, the font of the text and, adding a picture of your item.

The following are the buttons maximum pixel dimensions, if you will be using images in place of buttons:

- The **Placeholder** buttons – 162x102 pixels.
- The **Left** and **Right** buttons – 60x60 pixels.
- The **Next Step** button – 140x60 pixels.

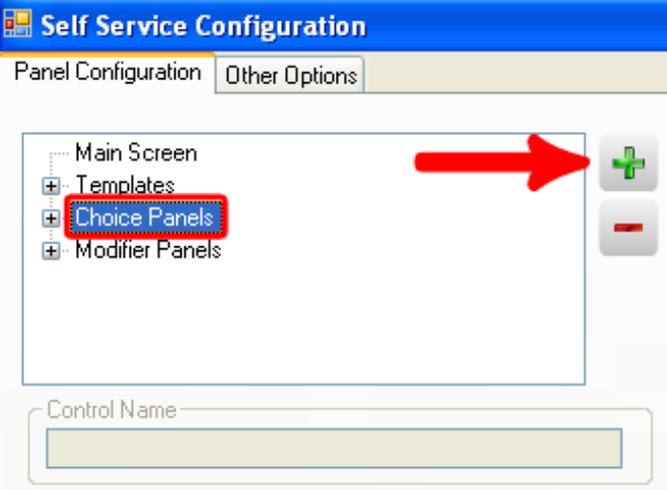
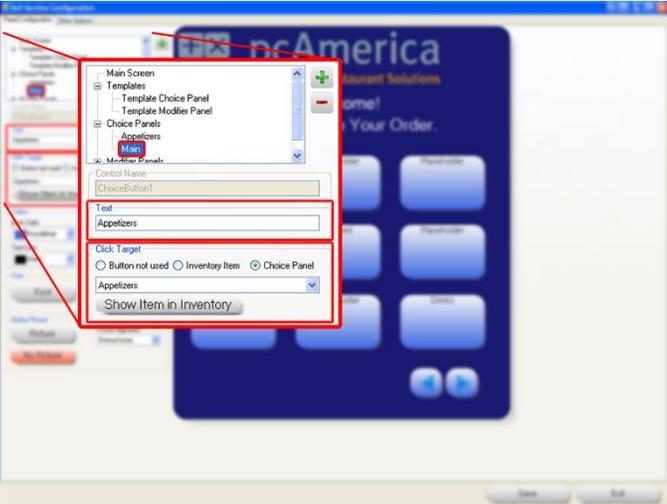
8. To edit the background color, simply select an area of the background. Using the controls on the left, make any changes.

9. To edit the Top Caption 1, simply select the text. Using the controls on the left, make any changes.

10. Select **Save**.

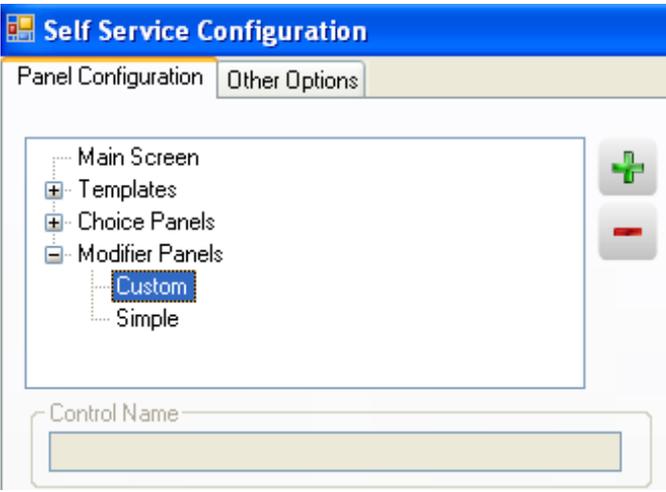
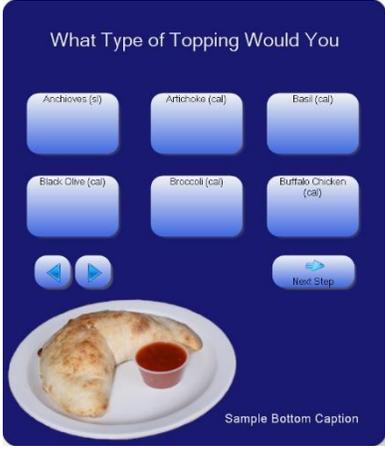
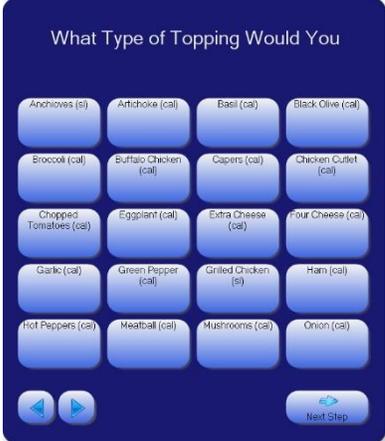
Creating New Choice Panels

Choice panels are the main type of panel, and at least 1 must be created in order to get a working self service screen. In our example we will be creating a Main Choice Panel (which will be the first panel that your customer views) and then a subpage containing items.

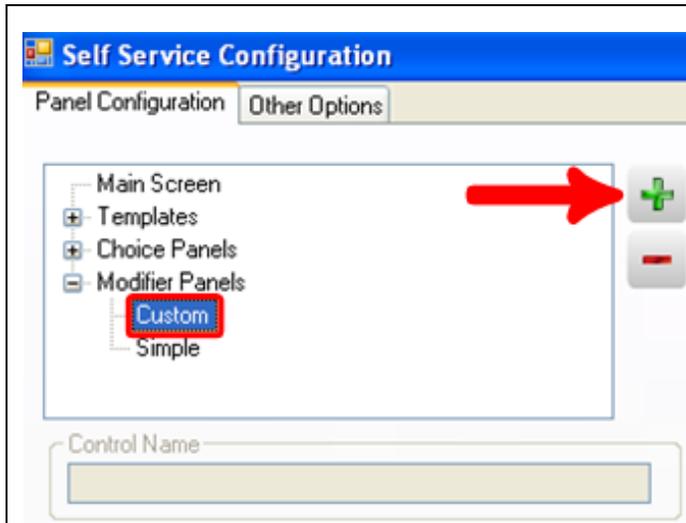
	<ol style="list-style-type: none">1. To create a new panel, select the node you'd like to add a panel to (Choice Panels), and select the green plus icon next to the tree.2. This will create a new blank panel, based on the template, with a name that says Not Set. Click on the panel's background and change the Control Name to give it a friendlier name (i.e. Main). We will then want to create another Choice Panel and name it Appetizer. <p>Note: Remove a panel by selecting it in the list and selecting the minus button.</p> <p>Note: You can create an unlimited number of choice panels and link them however you'd like.</p>
	<ol style="list-style-type: none">3. Choice panels have buttons that have 2 different functions:<ul style="list-style-type: none">• Inventory Item – Choose the item from the dropdown that you wish to sell when the button is pressed.• Choice panel – Select the panel from the dropdown you want to display when the button is pressed. <p>Note: Any buttons whose Click Target is Button not used, will not be displayed to the customer. If there are not enough items for more than 1 page, the next and previous buttons will be hidden as well.</p> <ol style="list-style-type: none">4. Select a button on the layout and then change the Text to Appetizer. We will then change the Click Target to Choice Panel. We will then use the dropdown to select the Choice Panel that we created (Appetizer).5. To change the Sample Top Captions, select the text and enter something on the left under the Text field (e.g. Welcome!).

Note: If adding Inventory items that have modifiers or modifier groups attached to them, the Modifier Panel Template will be used by default. However, each Modifier/Modifier Group Panel can be customized per item.

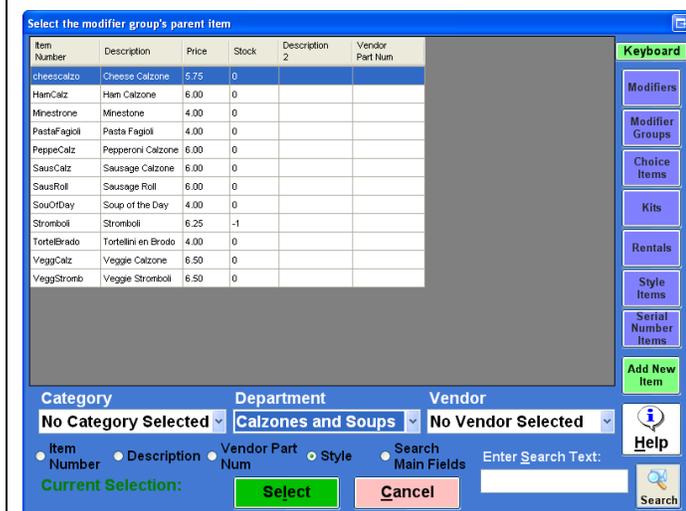
Modifier Panels

	<p>1. When adding new Modifier Panels there are two choices of panels to create:</p>
	<ul style="list-style-type: none"> • Custom <ul style="list-style-type: none"> ○ Custom modifier panels display up to 6 uniform buttons per page. A change to one button's properties will change all of the buttons on the page. ○ Custom modifier panels have a picture available at the bottom left of the page.
	<ul style="list-style-type: none"> • Simple <ul style="list-style-type: none"> ○ Simple modifier panels display up to 20 uniform buttons per page. A change to one button's properties will change all of the buttons on the page. ○ Simple modifier panels do not use pictures.

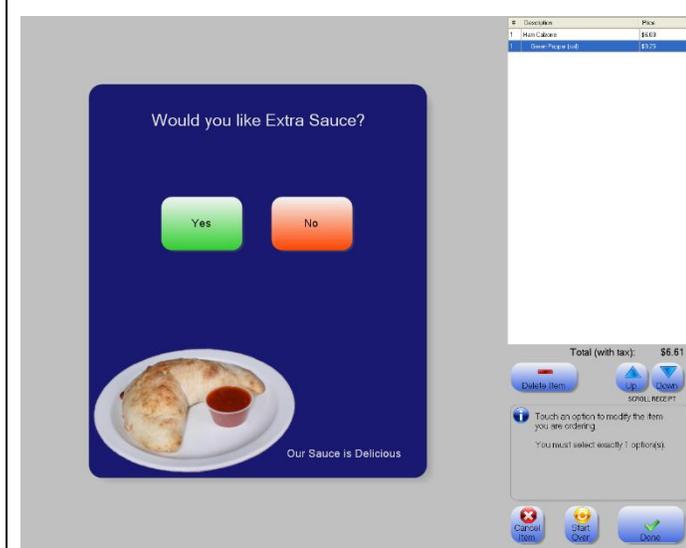
Modifier Panels – Custom



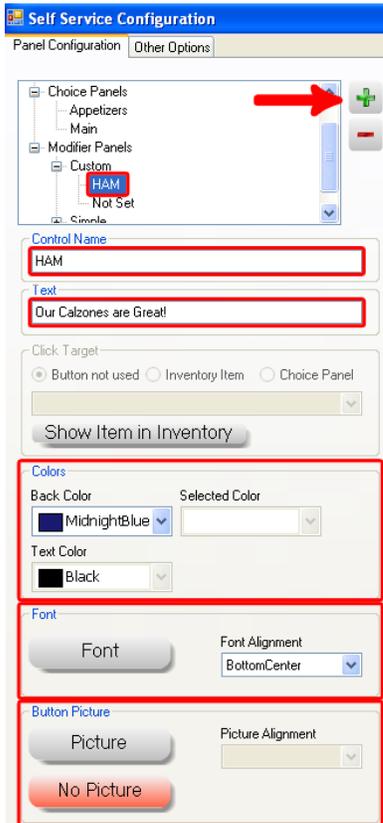
1. To add a new **Custom Modifier Panel**, highlight **Custom** under **Modifier Panels** and select the green plus icon next to the tree.



2. When you choose to add a new modifier panel, you will first be asked to select the parent item (item to be modified), followed by which modifier group to add.

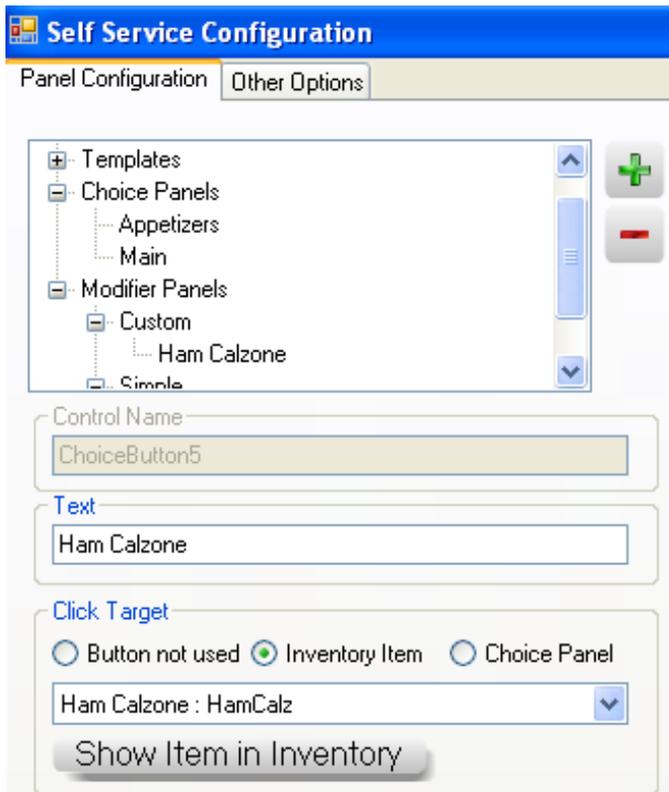


Note: Any modifier groups that have a single item in them are converted into a yes/no question. You are able to modify the yes/no buttons.



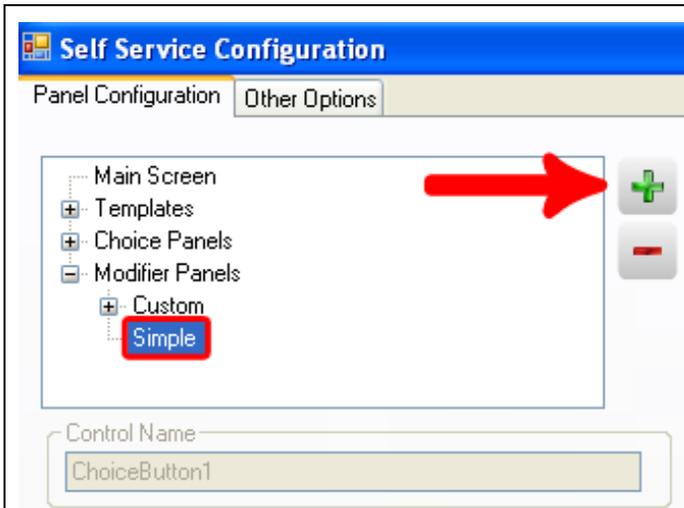
3. After adding the **Modifier Panel** you can configure it using the controls on the left.
4. When selecting the background you will be able to; change the **Control Name** (recommended for organization), add an image (custom panel only) under button picture, and change the background color under Colors.
5. To edit any text on this screen, select the text in question you will then be able to edit the **Font** and **Colors**.
6. To edit the buttons, select one and you will be able to edit the color and font. Any change made to a modifier button will change all of the modifier buttons.

Note: You will be able to edit the Previous, next, and next step buttons separately. You will also have the ability to add a picture to any of them by selecting one and then specifying a picture under **Button Picture**.

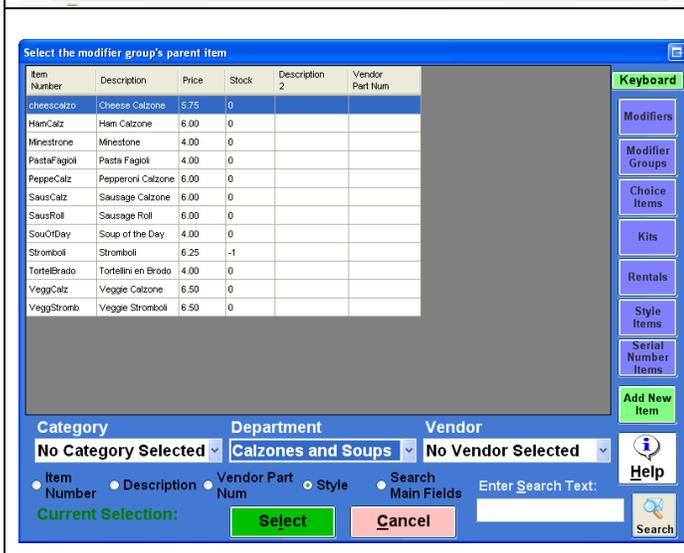


After adding the Modifier Panel (Ham Calzone Toppings) and configuring it how you want it, you will need to add the parent item (Ham Calzone) to one of your choice panels.

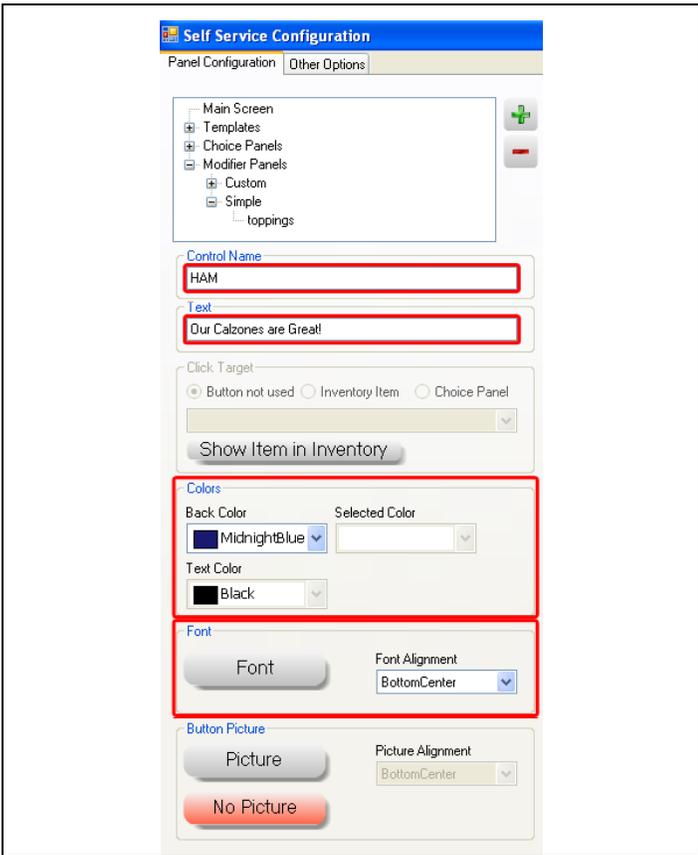
Modifier Panels – Simple



1. To add a new **Custom Modifier Panel**, highlight **Simple** under **Modifier Panels** and select the green plus icon next to the tree.

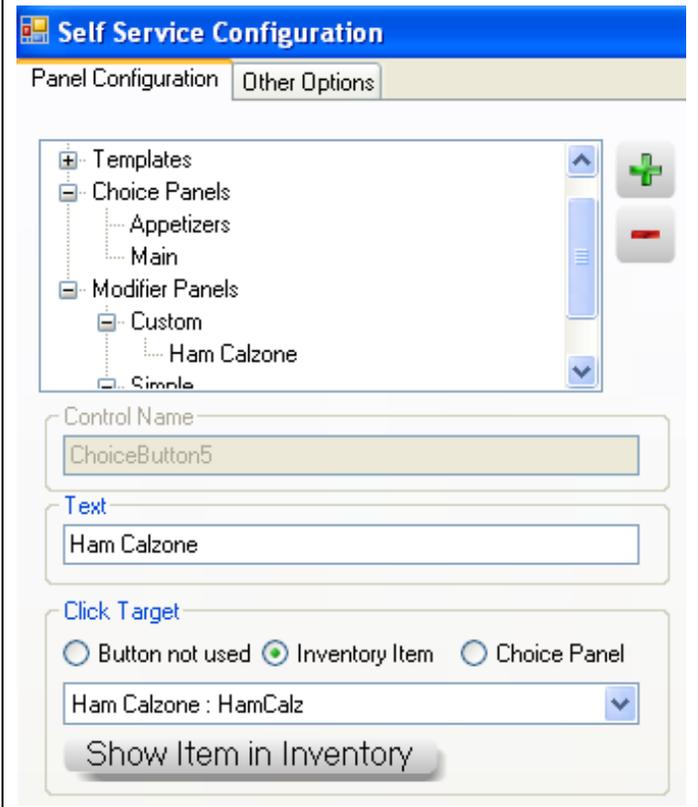


2. When you choose to add a new modifier panel, you will first be asked to select the parent item (item to be modified), followed by which modifier group to add.



3. After adding the **Modifier Panel** you can configure it using the controls on the left.
4. When selecting the background you will be able to change the **Control Name** (recommended for organization), and change the background color under Colors.
5. To edit any text on this screen, select the text in question you will then be able to edit the **Font** and **Colors**.
6. To edit the buttons, select one and you will be able to edit the color and font. Any change made to a modifier button will change all of the modifier buttons.

Note: You will be able to edit the Previous, next, and next step buttons separately. You will also have the ability to add a picture to any of them by selecting one and then specifying a picture under **Button Picture**.



After adding the Modifier Panel (Ham Calzone Toppings) and configuring it how you want it, you will need to add the parent item (Ham Calzone) to one of your choice panels.

Other Options Tab

The screenshot shows a software configuration window titled "Self Service Configuration" with two tabs: "Panel Configuration" and "Other Options". The "Other Options" tab is active. The configuration includes:

- Order Timeout (in seconds):** A dropdown menu set to "60".
- After Ordering an Item:** A dropdown menu set to "Go Back to Initial Pa".
- Initial Panel:** A dropdown menu set to "MAIN PANEL".
- Hide Help Panel:** An unchecked checkbox.
- Done Button Function:** A group of three checkboxes: "Print and hold" (checked), "Credit Card Payment" (unchecked), and "Paydiant" (unchecked).
- Customize Message Setup For Salon:** A large empty text area for entering a custom message.
- Buttons:** "Save" and "Exit" buttons at the bottom.

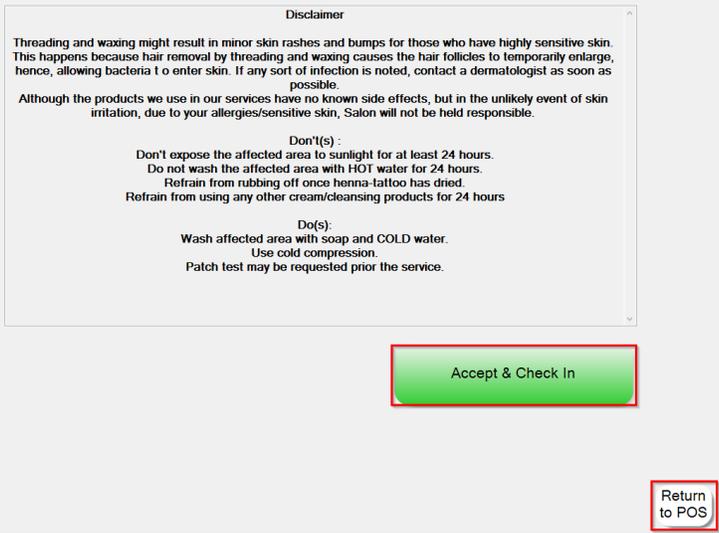
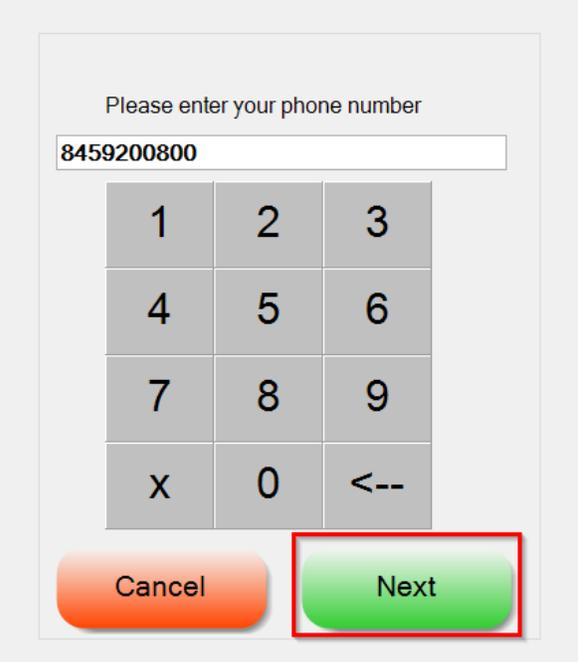
1. For **Order timeout** set an amount of time (in seconds) that the screen will reset due to inactivity. If the customer doesn't touch any buttons or screen at all, when 15 seconds are remaining in the countdown, they will be presented with a question asking if they would like to cancel their order. If they choose to continue, the timer will reset.
2. Set the **Initial panel** to the choice panel you would like the customer to see by default.
3. Set a **Custom Message Setup for Salon** to display a message for the customer to see after they selected done on the invoice screen.

Default message if blank is:

Thank You For your business
Please wait for your Turn

Using the Self check in feature

Using this feature customer will have the availability to create their own Invoice and set it On-hold.

<h3>Self Check in mode</h3>	<ol style="list-style-type: none">1. Select the Self check in mode button from the login screen.
	<ol style="list-style-type: none">2. The disclaimer panel displays. <p>This will be the starting point for the customer's check in process. When the customer completes their order it will return to this screen for the next customer to check in.</p> <ol style="list-style-type: none">3. Select Accept & Check In to continue with the Check In process <p>Return to POS brings you to the login screen.</p>
	<ol style="list-style-type: none">4. Enter phone number5. Select Next <p>(Must enter area code along with number). Once the 10 digits are entered the next button will be enable to continue.</p>

Existing Customer:

Existing Customer will be required to select their name from the list. You can have several Name associated with phone number.

Please Select Name

- Jeanine County
- Rob County
- New

Cancel Next

1. Select **your name**. If your name isn't there, you can add a new customer by selecting **New**.
2. Select **Next**.

Selecting **New** will bring to the **new customer screen**
The New Name will be added to the list for the next time.

New Customer:

New Customers will be required to create an account before they can create an order.

New Customer

First Name

Last Name

Phone Number

Email

1 2 3 4 5 6 7 8 9 0 -

Q W E R T Y U I O P < Backspace

A S D F G H J K L :

Z X C V B N M , . /

~ Shift SPACE ENTER

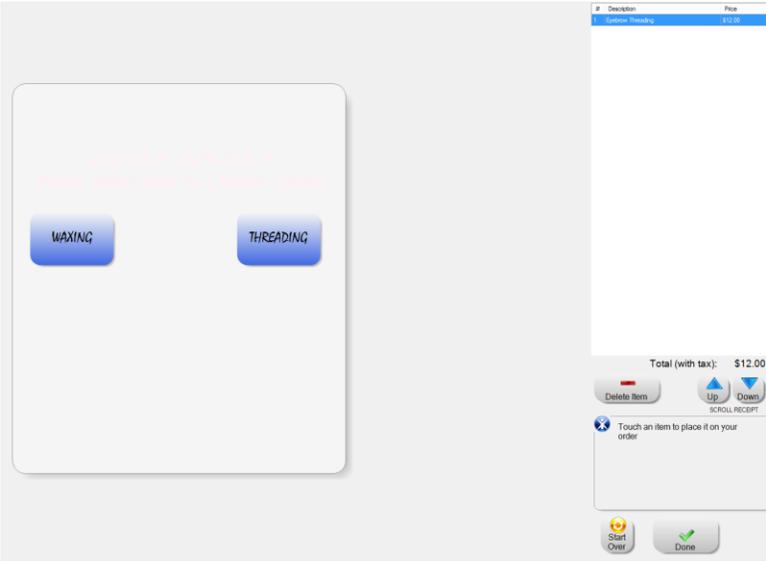
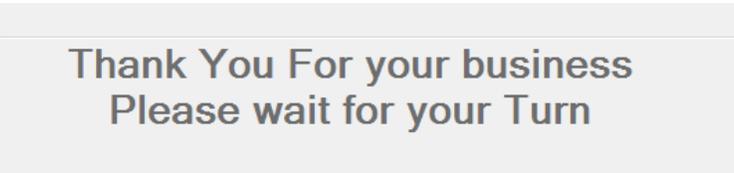
Cancel Next

1. Enter **First Name**
2. Enter **Last Name**
3. Enter **Email**
4. Select **Next**

Once all fields are complete the next button will become enabled to continue.

Creating an Invoice

Now the customer is able to select items from the invoice screen to add to their Order.

 <p>The screenshot shows a mobile application interface for creating an invoice. On the left, there is a large white box with a light blue border containing two blue buttons labeled 'WAXING' and 'THREADING'. To the right, a list of items is visible, with 'Threading' selected and priced at '\$12.00'. Below the list, there is a 'Total (with tax): \$12.00' label. At the bottom right, there are several control buttons: 'Delete Item', 'Up', 'Down', 'SCROLL RECEIPT', 'Start Over', and 'Done'.</p>	<ol style="list-style-type: none">1. Add items to the invoice.2. Select Done to create their On-Hold Invoice.
 <p>The screenshot shows a grey rectangular box with the text 'Thank You For your business Please wait for your Turn' centered in a dark grey font.</p>	<ol style="list-style-type: none">3. After the invoice is completed, it will display your custom Message. <p>If custom message is left blank. They will see this default message. Before returning to the Disclaimer panel Screen</p>

Associated an Employee to an Invoice

Employee can associated themselves to an invoice. Following these steps

	<ol style="list-style-type: none">1. If Disclaimer panel shown, Select Return to POS button to return to login screen.												
 <p>Please enter your ID or swipe your card</p> <p>Self Check in mode Manager Help Exit</p> <table border="1"><tr><td>7</td><td>8</td><td>9</td></tr><tr><td>4</td><td>5</td><td>6</td></tr><tr><td>1</td><td>2</td><td>3</td></tr><tr><td>Delete</td><td>0</td><td>Enter</td></tr></table> <p>JZON SALON</p>	7	8	9	4	5	6	1	2	3	Delete	0	Enter	<ol style="list-style-type: none">2. Login screen, Enter ID and then Password
7	8	9											
4	5	6											
1	2	3											
Delete	0	Enter											
 <p>Exit to Login Invoice Screen Current Server JZON</p> <table border="1"><tr><td>Rub C</td><td>\$80.00</td></tr><tr><td>JYSON C</td><td>\$47.00</td></tr><tr><td>John S</td><td>\$25.00</td></tr><tr><td>Amy S</td><td>\$16.00</td></tr><tr><td>JYSON C</td><td>\$48.00</td></tr><tr><td>Jeanine C</td><td>\$50.00</td></tr></table>	Rub C	\$80.00	JYSON C	\$47.00	John S	\$25.00	Amy S	\$16.00	JYSON C	\$48.00	Jeanine C	\$50.00	<ol style="list-style-type: none">3. Select an Invoice tab that is green in color. (Waiting)  <p>Invoice Screen button will take you to the CRE invoice screen.</p>
Rub C	\$80.00												
JYSON C	\$47.00												
John S	\$25.00												
Amy S	\$16.00												
JYSON C	\$48.00												
Jeanine C	\$50.00												
	<ol style="list-style-type: none">4. Invoice screen, Select the Hold button and exit Invoice screen.												
	<ol style="list-style-type: none">5. Now that invoice is associated with the employee.												

On-Hold Screen Behavior

When an Employee logs in, they will see the on-hold invoice screen.

	<p>1. On-Hold Invoices are in order they're created. On the Invoice button Customer Name is displayed.</p> <p>Green – Invoice without an employee.(Waiting)</p>  <p>2. Once the employee select the invoice, and puts it back on hold. That employee is now assigned to that invoice. Name will show on the invoice button. (yellow)</p> <p>Yellow – invoice associated with the Current Employee logged into that Station.</p>  <p>Red – Employee associated with that invoice that is not currently logged into that station</p> 
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