



Portal User Guide

Franchise Management

Contents

Managing franchises	3
Creating a new event	4
Creating a new flat fee	6
Creating a sales fee.....	9
Deleting a fee or event	12
Editing a fee or event	14
Processing fee and event records.....	16
Processing fee and event emails.....	18
Processing fee invoices	20
Deleting a fee or event	22
Franchise Fee / Event Maintenance screen	24
Franchise Fee / Events report	30
Franchise Events Audit report.....	34
Franchise Fee Audit report.....	38
Sales By Division report	42
Weekly Site POS Usage report	46
Glossary	49

Managing franchises

You can use the Portal to manage your franchises, with reports of the activity across each site, and the ability to create recurring events and fees to help manage your stores. Franchise sites may have restrictions such as the ability to create new items in their inventory or change items descriptions.

Note: Franchise features must be initialised in your Portal configuration by AMC Convergent IT support staff before you can use them.

What you can do:

- *Creating a new event on page 4.*
- *Creating a new flat fee on page 6.*
- *Creating a sales fee on page 9.*
- *Editing a fee or event on page 14.*
- *Processing fee and event records on page 16.*
- *Processing fee and event emails on page 18.*
- *Processing fee invoices on page 20.*
- *Deleting a fee or event on page 22.*

Also see

- *Franchise Fee / Events report on page 30.*
- *Franchise Fee / Event Maintenance screen on page 24.*
- *Franchise Events Audit report on page 34.*
- *Franchise Fee Audit report on page 38.*
- *Sales By Division report on page 42.*
- *Weekly Site POS Usage report on page 46.*

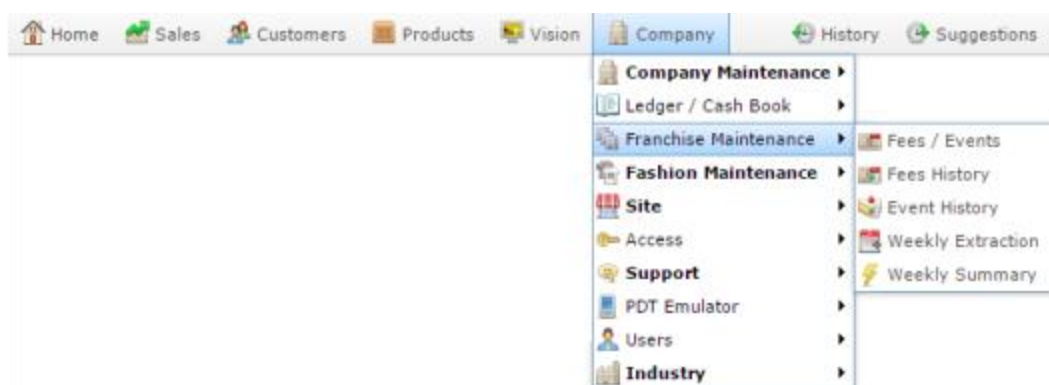
Creating a new event

Create an event to send notifications to your franchises on a recurring basis.

Note: Franchise fees and events must be created on the master company (-1) by an administrator with sufficient privileges.

To create an event:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.



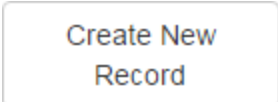
The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Desc'n	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amount
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Egy	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

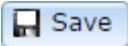
3. Press .

The Details tab of the Franchise Fee / Event Maintenance screen is displayed.

The screenshot shows a web form titled "Franchise Fee / Event Maintenance". It has two tabs: "Details" and "Bank Details". The "Details" tab is active. The form contains the following fields and controls:

- Code: [Text Field]
- Description: [Text Field]
- Type: [Drop-down menu, selected: Event]
- Month: [Drop-down menu, selected: Every Month]
- Trigger On: [Drop-down menu, selected: Day of Month]
- Day: [Drop-down menu, selected: Every Day]
- Site: [Drop-down menu, selected: AMC]
- Fee: [Text Field]
- Tax Rate: [Text Field]
- Minimum: [Text Field]
- Maximum: [Text Field]
- Start Date: [Date Picker]
- End Date: [Date Picker]
- Enabled: [Drop-down menu, selected: No]
- Debtor: [Drop-down menu, selected: Unassigned]
- Email Addresses: [Text Field]
- Comments: [Text Field]

A "Save" button is located at the bottom right of the form.

4. Type a description for the event in the **Description** field.
 5. Select **Event** in the **Type** drop-down field.
 6. Select which month the event should occur in the **Month** drop-down field.
 7. Select whether to trigger on a day of the week, or day of the month in the **Trigger On** drop-down field.
 8. Select which day of the month or week to trigger in the **Day** drop-down field.
 9. Select which site the event relates to in the **Site** drop-down field.
 10. Select the dates the event should start and drop being triggered in the **Start Date** and **End Date** fields.
 11. Select **Yes** in the **Enabled** field.
 12. Type the email addresses to send notifications to in the **Email Addresses** field, separated by a comma.
 13. Press  **Save**.
- The event is created.

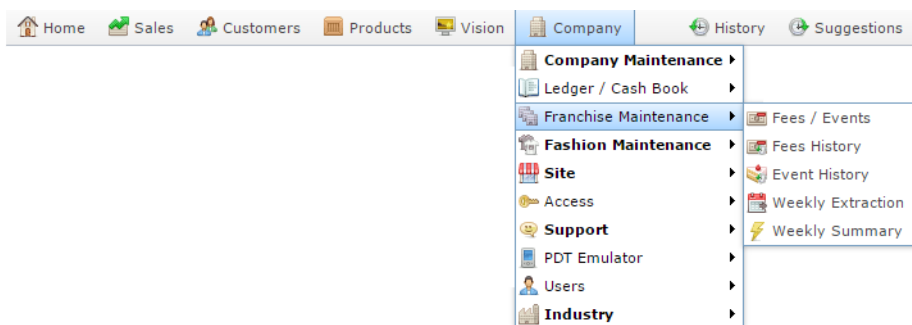
Creating a new flat fee

Create a flat fee to charge a set fee to your franchises on a recurring basis.

Note: Franchise fees and events must be created on the master company (-1) by an administrator with sufficient privileges.

To create a flat fee:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.

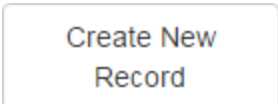


The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descri	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
<u>Test</u>	Test Site 3	Event	Day of Month	Every Month	Every Day				✓	17/06/	19/06/	19/06/	
<u>Month Pay</u>	Test Site 3	Flat Fee	Day of Week	Every Month	Every Day	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site:

3. Press .

The Details tab of the Franchise Fee / Event Maintenance screen is displayed.

4. Type a description for the fee in the **Description** field.
5. Select **Flat Fee** in the **Type** drop-down field.
6. Select which month the fee should be charged in the **Month** drop-down field.
7. Select whether to trigger on a day of the week, or day of the month in the **Trigger On** drop-down field.
8. Select which day of the month or week to trigger in the **Day** drop-down field.
9. Select which site the fee is charged to in the **Site** drop-down field.
10. Type the amount that should be charged in the **Fee** field.
11. Type the tax rate the fee is charged at in the **Tax Rate** field.
12. Select the dates the fee should start and stop being triggered in the **Start Date** and **End Date** fields.
13. Select **Yes** in the **Enabled** field.
14. Type the email addresses to send notifications to in the **Email Addresses** field.
15. Press the **Bank Details** tab.
16. The **Bank Details** tab is displayed.

Franchise Fee / Event Maintenance

Details **Bank Details**


Bank Name:

BSB No:

Account Number:

Account Name:

Account Type:

 Save

17. Type the details of the bank account the fee should be paid into.

See *Franchise Fee / Event Maintenance* screen on page 24.

18. Press  Save.


The fee is created.

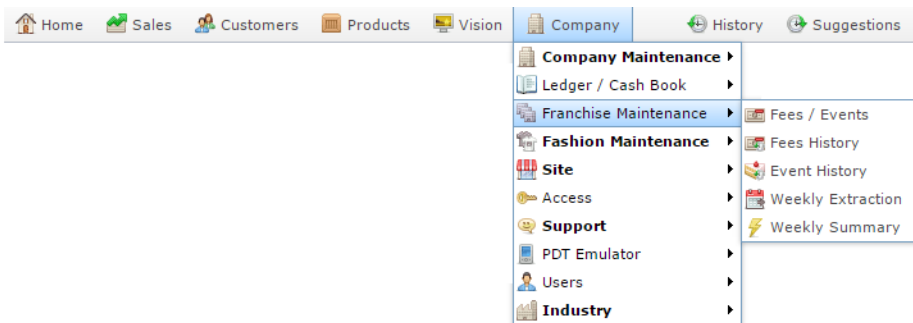
Creating a sales fee

Create an event to charge a fee to your franchises based on their sales totals on a recurring basis.

Note: Franchise fees and events must be created on the master company (-1) by an administrator with sufficient privileges.

To create a percentage fee:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.



The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descri	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
<u>Test</u>	Test Site 3	Event	Day of Month	Every Month	Every Day				✓	17/06/	19/06/	19/06/	
<u>Month Pay</u>	Test Site 3	Flat Fee	Day of Week	Every Month	Every Day	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site

All

Add to Favourites

Create New
Record

Create New
Record

3. Press .

The Details tab of the Franchise Fee / Event Maintenance screen is displayed.

The screenshot shows a software interface for managing franchise fees. The 'Details' tab is active, displaying various input fields for configuring an event-based fee. The 'Type' is set to 'Event', the 'Month' to 'Every Month', and the 'Trigger On' to 'Day of Month'. The 'Day' is set to 'Every Day' and the 'Site' is 'AMC'. The 'Enabled' field is set to 'No'. There are empty text boxes for 'Description', 'Fee', 'Tax Rate', 'Minimum', 'Maximum', 'Start Date', 'End Date', 'Email Addresses', and 'Comments'. A 'Save' button is located in the bottom right corner.

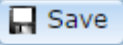
4. Type a description for the event in the **Description** field.
5. Select **Sales Based % (Inc)** in the **Type** drop-down field.

Note: This calculates the site's fee based on their sales total, including tax. If you want to calculate excluding tax, select **Sales Based % (Ex)**.

6. Select which month the fee should be charged in the **Month** drop-down field.
7. Select whether to trigger on a day of the week, or day of the month in the **Trigger On** drop-down field.
8. Select which day of the month or week to trigger in the **Day** drop-down field.
9. Select which site the fee is charged to in the **Site** drop-down field.
10. Type the percentage that should be charged in the **Fee** field.
11. Type the tax rate the fee is charged at in the **Tax Rate** field.
12. Type the minimum fee that should be charged in the **Minimum** field.
For example, if you want to charge at least \$100 regardless of the site's sales total that month, type **100**.
13. Type the maximum fee that should be charged in the **Maximum** field.
For example, if you want to charge no more than \$1000, even if the site does particularly well, type **1000**.
14. Select the dates the fee should start and drop being triggered in the **Start Date** and **End Date** fields.
15. Select **Yes** in the **Enabled** field.

16. Type the email addresses to send notifications to in the [Email Addresses](#) field.
17. Press the Bank Details tab.
18. The Bank Details tab is displayed.


The screenshot shows a web application window titled "Franchise Fee / Event Maintenance". At the top, there are two tabs: "Details" and "Bank Details", with "Bank Details" being the active tab. The main content area contains several input fields: "Bank Name:" with a text box, "BSB No:" with a text box, "Account Number:" with a text box, "Account Name:" with a text box, and "Account Type:" with a dropdown menu currently set to "Cheque". At the bottom right of the window, there are three buttons: "Save" (with a floppy disk icon), "New Record", and "Delete Record".

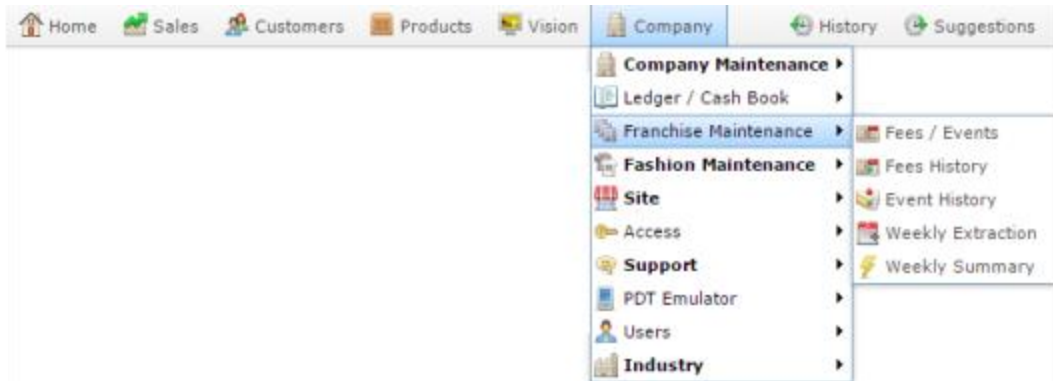
19. Type the details of the bank account the fee should be paid into.
See *Franchise Fee / Event Maintenance* screen on page 24.
20. Press  Save.
The fee is created.

Deleting a fee or event

Delete a fee or event to remove it from the Portal.

To delete a fee or event:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.



The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descn	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

3. Press the **Description** of the event or fee you want to delete.

Franchise Fee / Events Report

Descn	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

A popup menu is displayed.

Franchise Fee / Events Report

Descri	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Is				Every	Every				✓	17/06/	19/06/	19/06/	
				Month	Day								
M				Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00
ay	Site 3	Fee	of	Month	Day								
				Week									

Site: All

Add to Favourites Create New Record

4. Press Edit Fee Record.

The Details tab of the Franchise Fee / Event Maintenance screen is displayed.

Franchise Fee / Event Maintenance

Details Bank Details

Code: 1

Description: Test

Type: Event

Month: Every Month

Trigger On: Day of Month

Day: Every Day

Site: Test Site 3

Fee: 0

Tax Rate: 0

Minimum: \$0 Maximum: \$0

Start Date: 17/06/2006

End Date: 19/06/2011

Enabled: Yes

Debtor: Unassigned

Email Addresses: [Redacted]

Comments: This is a test comment

Save New Record Delete Record

5. Press Delete Record.

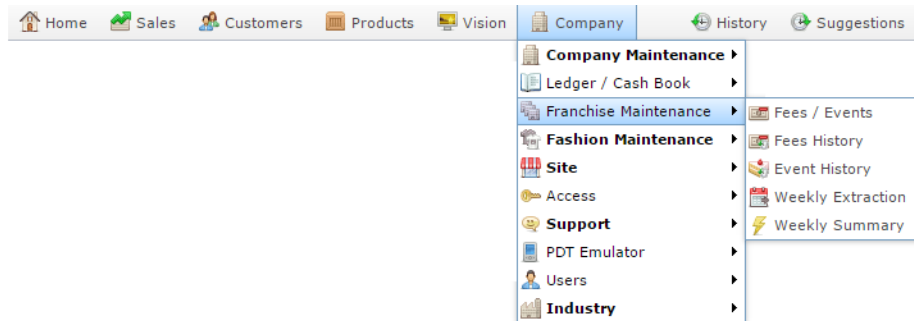
The fee or event is deleted.

Editing a fee or event

Edit a fee or event to change when it is triggered, what it charges, or who it notifies.

To edit a fee or event:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.



The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
<u>Test</u>	Test Site 3	Event	Day of Month	Every Month	Every Day				✓	17/06/	19/06/	19/06/	
<u>Month Pay</u>	Test Site 3	Flat Fee	Day of Week	Every Month	Every Day	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site

All

Add to Favourites

Create New
Record

3. Press the **Description** of the event or fee you want to edit.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
<u>Test</u>	Test Site 3	Event	Day of Month	Every Month	Every Day				✓	17/06/	19/06/	19/06/	
<u>Month Pay</u>	Test Site 3	Flat Fee	Day of Week	Every Month	Every Day	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site

All

Add to Favourites

Create New
Record

A popup menu is displayed.

Franchise Fee / Events Report

Descri	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test		Event	Day of Month	Every Month	Every Day				✓	17/06/	19/06/	19/06/	
Pay Site 3 Fee of Week	Site 3	Fee	Day of Week	Every Month	Every Day	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site:

4. Press **Edit Fee Record**.

The Details tab of the Franchise Fee / Event Maintenance screen is displayed.

Franchise Fee / Event Maintenance

Details

Code:

Description:

Type:

Month:

Trigger On:

Day:

Site:

Fee:

Tax Rate:

Minimum: Maximum:

Start Date:

End Date:

Enabled:

Debtor:

Email Addresses:

Comments:

5. Edit the fields as required.

See *Franchise Fee / Event Maintenance screen* on page 24.


6. Press .

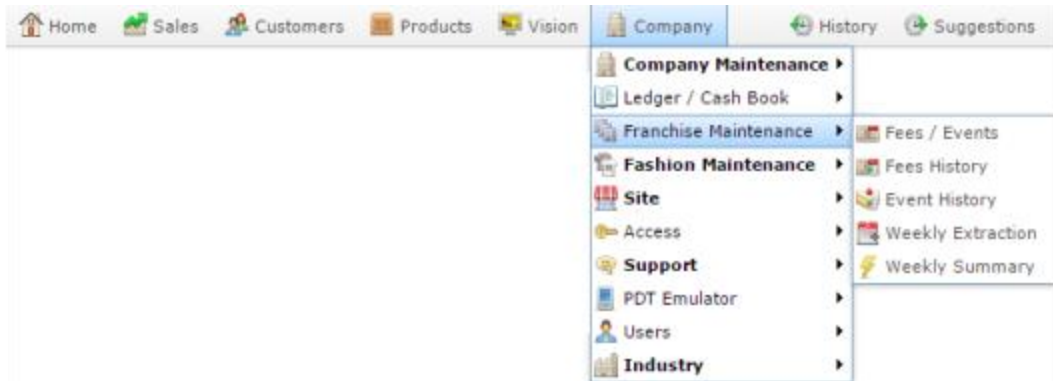
The fee or event is saved.

Processing fee and event records

Process a fee and event record to trigger a fee and event if the event date has passed.

To process fee and event records:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.



The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

3. Press the **Description** of the event or fee you want to process.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

A popup menu is displayed.

Franchise Fee / Events Report

Descr	Site	Type	Trigg On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Is				Every	Every				✓	17/06/	19/06/	19/06/	
				Month	Day								
M				Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00
Pay	Site 3	Fee	of	Month	Day								
			Week										

Site

All

Add to Favourites

Create New
Record

4. Press Process Fee Record.

The fee and event records are processed, and the Franchise Fee Audit report is displayed.

Franchise Fee Audit Report

Desc	Site	Type	Fee	Trigg	Mont	Day	Min	Max	Date	Start Date	End Date	Amot	Sales	Email	Invoice	Proce
Total																

Date From

1/01/2014

Date To

12/01/2017

Site

All

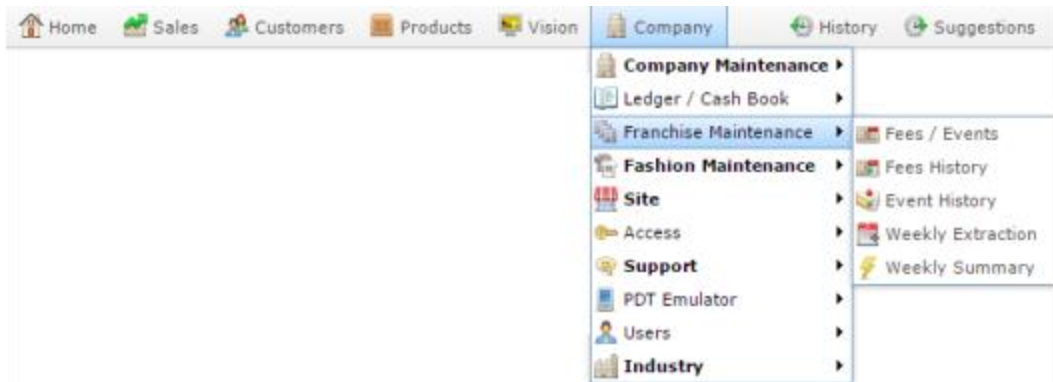
Add to Favourites

Processing fee and event emails

Process a fee email to trigger a the emails for any events or fees to be sent. This process creates an email for each franchisee.

To process fee and event emails:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.



The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

3. Press the **Description** of the event or fee you want to email.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

A popup menu is displayed.

Franchise Fee / Events Report

Descript	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Is				Every	Every				✓	17/06/	19/06/	19/06/	
				Month	Day								
M				Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00
Pay	Site 3	Fee	of	Month	Day								
			Week										

Site

All

Add to Favourites

Create New
Record

4. Press Process Fee Emails.

Note: This option is only displayed if the record is ready to be processed.

The emails are processed, and the Franchise Event Audit report is displayed.

Franchise Events Audit Report

Descript	Site	Period	Month	Day	Date	Start Date	End Date	Sales	Emailed	Commer
----------	------	--------	-------	-----	------	---------------	-------------	-------	---------	--------

Date From

1/01/2017

Date To

12/01/2017

Site

All

Add to Favourites

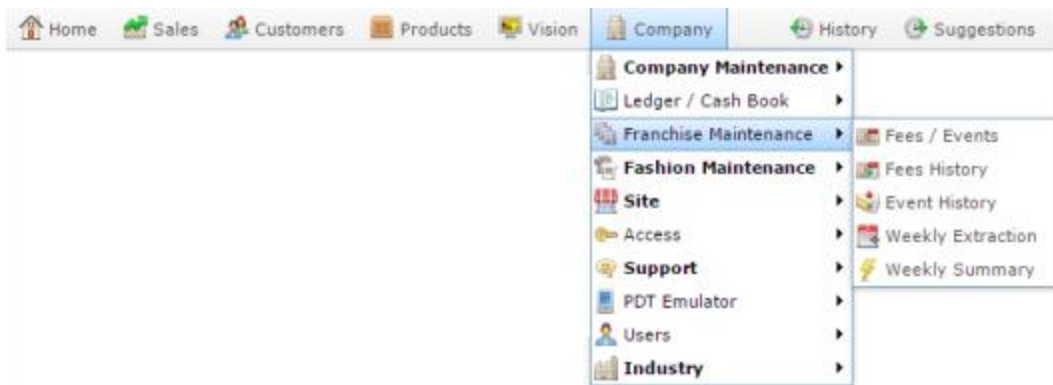
Processing fee invoices

Process a fee invoice to create invoices from due payments. This process:

- Creates a debtor invoice for the franchisor.
- Creates a creditor invoice for the franchisee.
- Emails those invoices to the franchisor and franchisee.

To process fee invoices:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.



The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

3. Press the **Description** of the fee you want to create an invoice for.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

A popup menu is displayed.

Franchise Fee / Events Report

Descr	Site	Type	Trigg On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Is				Every	Every				✓	17/06/	19/06/	19/06/	
				Month	Day								
				Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00
Pay	Site 3	Fee	of	Month	Day								
				Week									

- Edit Fee Record
- Process Fee Record
- Process Fee Emails

Site

All

Add to Favourites

Create New
Record

4. Press [Process Fee Invoice](#).

The fee records are processed, invoices are created and the Franchise Fee Audit report is displayed.

Franchise Fee Audit Report

Desc	Site	Type	Fee	Trigg	Mont	Day	Min	Max	Date	Start Date	End Date	Amot	Sales	Email	Invoice	Proce
Total																

Date From

1/01/2014

Date To

12/01/2017

Site


All

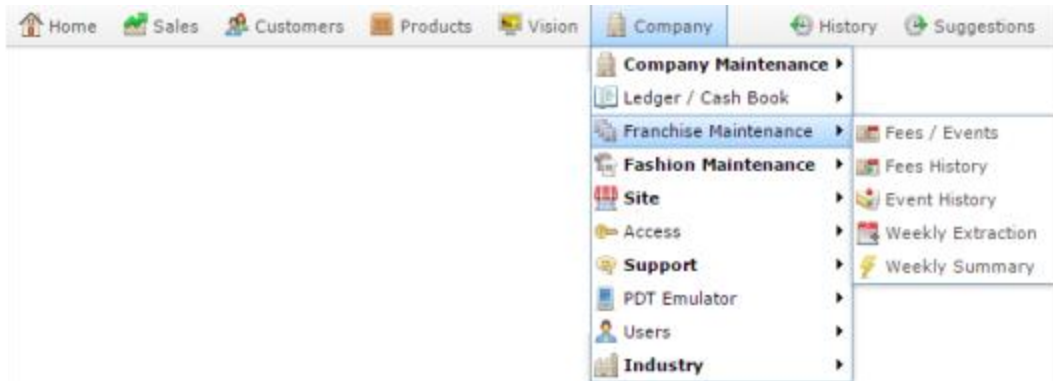
Add to Favourites

Deleting a fee or event

Delete a fee or event to remove it from the Portal.

To delete a fee or event:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.



The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descn	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

3. Press the **Description** of the event or fee you want to delete.

Franchise Fee / Events Report

Descn	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

A popup menu is displayed.

Franchise Fee / Events Report

Descri	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Is				Every	Every				✓	17/06/	19/06/	19/06/	
				Month	Day								
M				Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00
ay	Site 3	Fee	of	Month	Day								
				Week									

Site
All >

Add to Favourites

Create New Record

4. Press Edit Fee Record.

The Details tab of the Franchise Fee / Event Maintenance screen is displayed.

Franchise Fee / Event Maintenance

Details | Bank Details

Code: 1

Description: Test

Type: Event

Month: Every Month

Trigger On: Day of Month

Day: Every Day

Site: Test Site 3

Fee: 0

Tax Rate: 0

Minimum: \$0 Maximum: \$0

Start Date: 17/06/2006

End Date: 19/06/2011

Enabled: Yes

Debtor: Unassigned

Email Addresses:

Comments: This is a test comment

5. Press .

The fee or event is deleted.

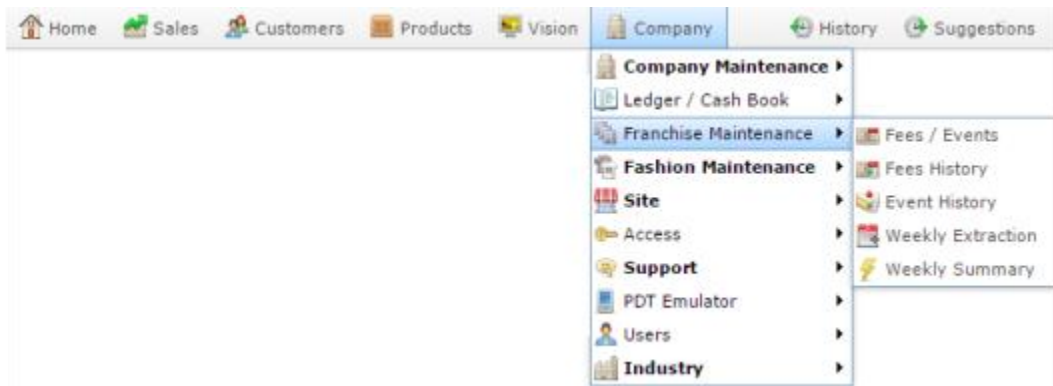
Franchise Fee / Event Maintenance screen

Use this screen to view, edit and process the fees and events set up for your franchise.

Opening the Franchise Fee / Event Maintenance screen

To open the Franchise Fee / Event Maintenance screen:

1. Press  Company from the menu bar.
2. Press Franchise Maintenance > Fees / Events.



The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

3. Press the Description of the event or fee you want to edit.

Franchise Fee / Events Report

Descr	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site: All

Add to Favourites Create New Record

A popup menu is displayed.

Franchise Fee / Events Report

Descri	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Is				Every	Every				✓	17/06/	19/06/	19/06/	
M				Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00
Pay	Site 3	Fee	of	Month	Day								
				Week									

Site:

4. Press Edit Fee Record.

The Details tab of the Franchise Fee / Event Maintenance screen is displayed.

Franchise Fee / Event Maintenance

Details
Bank Details

Code:

Description:

Type:

Month:

Trigger On:

Day:

Site:

Fee:

Tax Rate:

Minimum: Maximum:

Start Date:

End Date:

Enabled:

Debtor:

Email Addresses:

Comments:

Franchise Fee / Event Maintenance screen key fields and buttons

Details tab

Use this area to define the trigger for the fee or event.

Franchise Fee / Event Maintenance

Details Bank Details

Code: 1

Description: Test

Type: Event

Month: Every Month

Trigger On: Day of Month

Day: Every Day

Site: Test Site 3

Fee: 0

Tax Rate: 0

Minimum: \$0 Maximum: \$0

Start Date: 17/06/2006

End Date: 19/06/2011

Enabled: Yes

Debtor: Unassigned

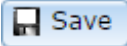
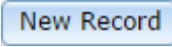
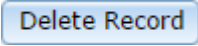
Email Addresses:

Comments: This is a test comment

Save New Record Delete Record

Field	Description
Code	Unique code to identify the fee or event.
Description	Description of the fee or event.
Type	Select whether this is: <ul style="list-style-type: none"> An event to send a notification to the listed email addresses. A flat fee occurring at a regular period. A fee based on the total sales (including tax) made during the period, occurring at a regular period. A fee based on the total sales (excluding tax) made during the period, occurring at a regular period.
Month	Select whether the fee or event occurs every month, or only a specific month of the year.

Field	Description
Trigger On	Select whether to trigger on a specific day of the month, or a specific day of the week.
Day	Select the day of the month or day of the week you want to trigger on.
Site	Select the site the fee or event applies to.
Fee	Type the fee to be applied: <ul style="list-style-type: none"> ▪ If you have selected a flat fee in the Type field, type the amount to be charged. For example, 10 to charge \$10. ▪ If you have selected a percentage fee (%) in the Type field, type the percent to charge. For example, 25 to charge 25%.
Tax Rate	Type the tax percentage to be charged on the fee.
Minimum	Type the minimum amount the fee should be.
	Note: This field is only required if you are charging a percentage fee.
Maximum	Type the maximum amount the fee should be.
	Note: This field is only required if you are charging a percentage fee.
Start Date	Type the date from which the fee or event should start to trigger.
End Date	Type the last date at which the fee or event should be triggered.

Field	Description
Enabled	Select whether this fee or event is currently active in the Portal. Events or fees that are not enabled do not send fees or notifications when their trigger occurs.
Debtor	Select the debtor to whom the fees should be charged.
Email Addresses	Type the email addresses that the notifications should be sent to. You can separate multiple email addresses using a comma.
Comments	Type any comment regarding the fee or event.
	Save your changes to the fee or event.
	Create a new fee or event.
	Delete this fee or event.

Bank Details tab

Use this area to define the bank details that any fees should be paid into.

The screenshot shows a web application window titled "Franchise Fee / Event Maintenance". It has two tabs: "Details" and "Bank Details", with "Bank Details" selected. The form contains the following fields:

- Bank Name:
- BSB No:
- Account Number:
- Account Name:
- Account Type:

At the bottom right of the form, there are three buttons: "Save", "New Record", and "Delete Record".

Field	Description
Bank Name	The name of the bank where the account is held.
BSB No	The branch identification number of the bank where the account is held.
Account Number	The identification number of the account.
Account Name	The name of the account.
Account Type	The type of the account.

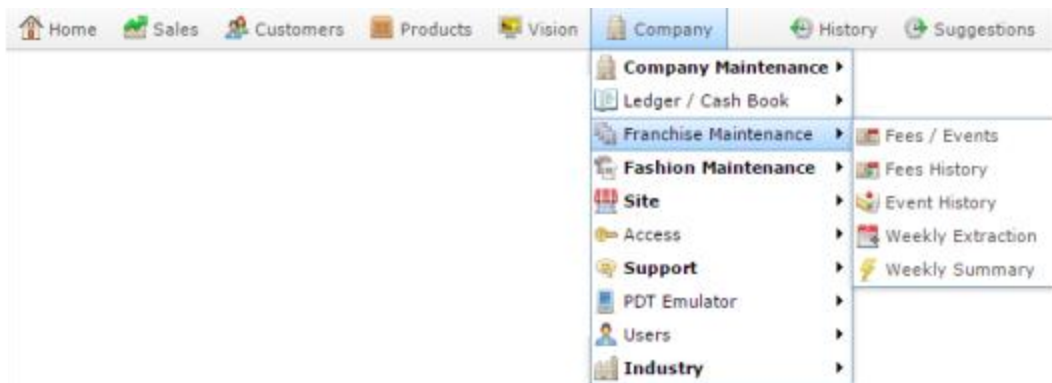
Franchise Fee / Events report

Use the Franchise Fee / Events report to view and edit fees or events for your franchise sites.

Opening the Franchise Fee / Events report

To open the Franchise Fee / Events report:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fees / Events**.



The Franchise Fee / Events report is displayed.

Franchise Fee / Events Report

Descn	Site	Type	Trigge On	Month	Day	Fee	Min	Max	Enable	Start Date	End Date	Last Date	Amour
Test	Test Site 3	Event	Day of Month	Every	Every				✓	17/06/	19/06/	19/06/	
Month Pay	Test Site 3	Flat Fee	Day of Week	Every	Every	\$10.00	\$0.00	\$0.00	✓	27/07/	27/07/	27/07/	\$10.00

Site:

Franchise Fee / Events report key fields

Filters area

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

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
<input type="button" value="Create New Record"/>	Press to create a new fee or event record.
Site / Sites	Select the site or sites to report on.

Report area

This area displays report information.

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

Field	Description
Description	Description of the fee or event.
Site	The site the fee or event is billed to.
Type	The type of fee or event.
Trigger On / Period	The timeline of the event or fee trigger, for example monthly or weekly.
Month	Which month the event is triggered.
Day	Which day of the week or month the event is triggered.
Fee	The fee charged.
Min	The minimum of the trigger, if using a range to trigger this fee to create a sliding scale of fees.


Field	Description
Max	The maximum of the trigger, if using a range to trigger this fee to create a sliding scale of fees.
Enabled	Whether this fee or event is active in the Portal.
Start Date	The date the trigger for the fee or event starts.
End Date	The date the trigger for the fee or event ends.
Last Date / Date	The date the fee or event was last triggered.
Amount	Amount that was charged the last time this was triggered.

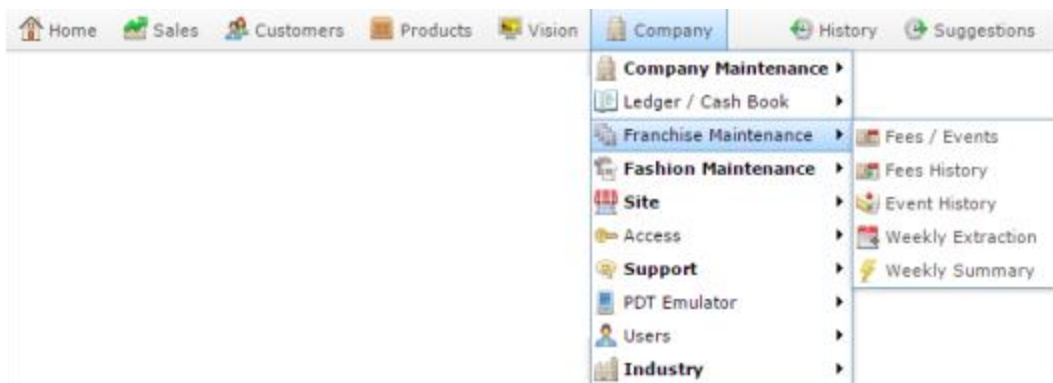
Franchise Events Audit report

Use the Franchise Events Audit report to view the franchise events that have occurred over the selected period.

Opening the Franchise Events Audit report

To open the Franchise Events Audit report:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Event History**.



The Franchise Events Audit report is displayed.

Franchise Events Audit Report

Descript	Site	Period	Month	Day	Date	Start Date	End Date	Sales	Emailed	Commer
----------	------	--------	-------	-----	------	------------	----------	-------	---------	--------

Date From

Date To

Site

Franchise Events Audit report key fields

Filters area

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

Field	Description
<input type="button" value="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.

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 fee or event.
Site	The site the fee or event is billed to.
Trigger On / Period	The timeline of the event or fee trigger, for example monthly or weekly.
Month	Which month the event is triggered.
Day	Which day of the week or month the event is triggered.
Start Date	The date the trigger for the fee or event starts.
End Date	The date the trigger for the fee or event ends.
Last Date / Date	The date the fee or event was last triggered.


Field	Description
Sales	Total sales for this period.
Emailed	Date the notification email was sent.
Comment	Comment on the event.

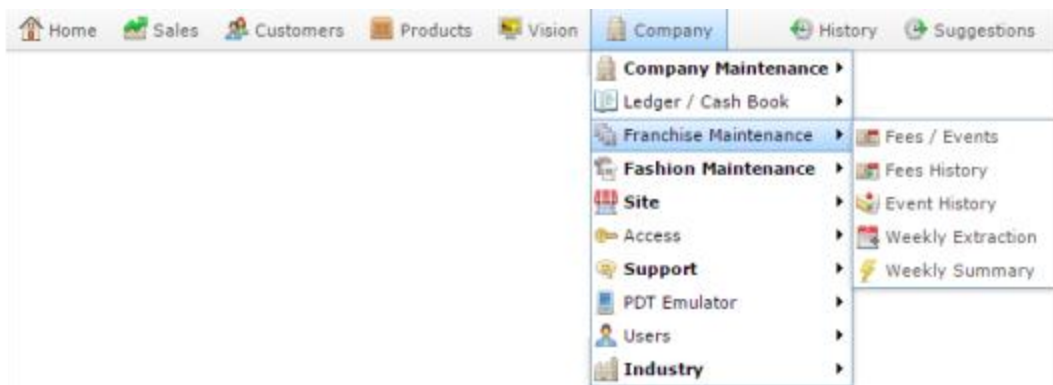
Franchise Fee Audit report

Use the Franchise Fee Audit report to view the fees that have been charged to sites over a selected period.

Opening the Franchise Fee Audit report

To open the Franchise Fee Audit report:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Fee History**.



The Franchise Fee Audit report is displayed.

Franchise Fee Audit Report

Desc	Site	Type	Fee	Trigg	Mont	Day	Min	Max	Date	Start Date	End Date	Amot	Sales	Email	Invoic	Proce
Total																

Date From

Date To

Site

Franchise Fee Audit report key fields

Filters area

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

Field	Description
<input type="button" value="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.

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 fee or event.
Site	The site the fee or event is billed to.
Type	The type of fee or event.
Trigger On / Period	The timeline of the event or fee trigger, for example monthly or weekly.
Month	Which month the event is triggered.
Day	Which day of the week or month the event is triggered.
Fee	The fee charged.
Min	The minimum of the trigger, if using a range to trigger this fee to create a sliding scale of fees.


Field	Description
Max	The maximum of the trigger, if using a range to trigger this fee to create a sliding scale of fees.
Enabled	Whether this fee or event is active in the Portal.
Start Date	The date the trigger for the fee or event starts.
End Date	The date the trigger for the fee or event ends.
Last Date / Date	The date the fee or event was last triggered.
Amount	Amount that was charged the last time this was triggered.
Sales	Total sales for this period.
Emailed	Date the notification email was sent.
Invoiced	Date the invoice was sent for the fee.
Processed	Date the fee was processed.

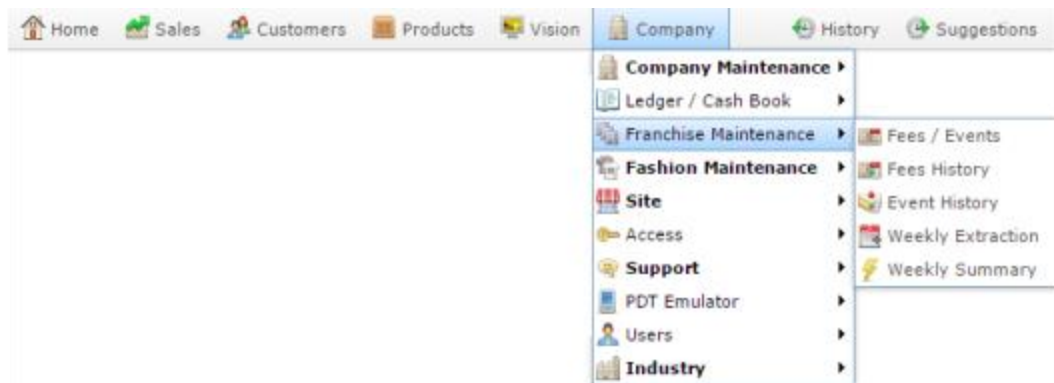
Sales By Division report

Use the Sales By Division report to view the activity of each site for the period.

Opening the Sales By Division report

To open the Sales By Division report:

1. Press  **Company** from the menu bar.
2. Press **Franchise Maintenance > Weekly Extraction**.



The Sales By Division report is displayed.

Sales By Division For Week End 14-Jan-2017

Site	Site #	Store #	Custom Gift Voucher Sales	Layby Paymer	Layby Comple	Charity	Sales Discour	Retail Sales Inclusive of Discour	Retail Cust #	Total Sales
AMC	1	3						\$25.85	6	\$25.85
Philippi	120	TBA						\$250.00	1	\$250.00
Whats Up	600	TBA						\$4,626.1	28	\$4,626.1
Total:			0	\$0.00	\$0.00	\$0.00	\$0.00	\$4,901.1	35	\$4,901.1

By:

Date:

Sales By Division report key fields

Filters area

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

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
By	Select to display the report for a specific day, week, month or year.
Date /	Select the date or date period to report on.
Date From and Date To /	
As of /	
Start Date and End Date	

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	Name of the site.
Site #	Unique code identifying the site.
Store #	Store number for the site, if this is different from the site number.
Customers	Number of customers who visited the site during this period.
Gift Voucher Sales	Total of gift voucher sales during this period.
Layby Payments	Total of layby payments received during this period.
Layby Completed	Total of completed laybys during this period.
Charity	Total of customer donations at Point of Sale.

Field	Description
Sales Discounts	Total sales discounts applied during this period.
Retail Sales Inclusive of Discount	Total retail sales during this period, accounting for discounts.
Retail Cust #	Total number of retail customers during this period.
Total Sales	Total sales received during this period.


Weekly Site POS Usage report

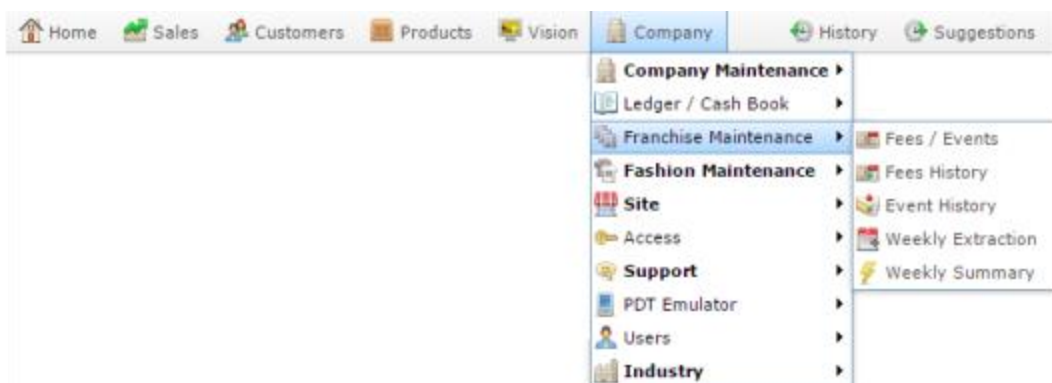
Use the Weekly Site POS Usage report to view the activity of each site for the period.

Note: If your company operates in more than one state, you can use the buttons on the site to filter the report by state.

Opening the Weekly Site POS Usage report

To open the Weekly Site POS Usage report:

1. Press  Company from the menu bar.
2. Press Franchise Maintenance > Weekly Summary.



The Weekly Site POS Usage report is displayed.

Weekly Site POS Usage Report for Week Ending 14-Jan-2017 (inc GST and NET of Discounts)

Date: 12/01/2017

Buttons: Add to Favourites, VIC, PHP, SA

Sites	6wk Moving Avg Sales	Total Sales	Retail Sales	Salon Sales	Scan Rate %	Misc Sales
AMC	\$27.64	\$25.85	\$25.85 (100.00%) 6			
Site 1 (JF)	\$341.00					
Whats Up	\$788.35	\$4,626.01	\$4,626.01 (100.00%) 98			
VIC Totals	\$1,156.99	\$4,651.86	\$4,651.86 (100.00%)	\$0.00 (0.00%)	0.00%	\$0.00 (0.00%)
Philippines	\$69.33	\$250.00	\$250.00 (100.00%) 1			
PHP Totals	\$69.33	\$250.00	\$250.00 (100.00%)	\$0.00 (0.00%)	0.00%	\$0.00 (0.00%)
Swift 1	\$131.29					
SA Totals	\$131.29	\$0.00	\$0.00 (0.00%)	\$0.00 (0.00%)	0.00%	\$0.00 (0.00%)
Grand Totals	\$1,357.60	\$4,901.86	\$4,901.86 (100.00%)	\$0.00 (0.00%)	0.00%	\$0.00 (0.00%)

Weekly Site POS Usage report key fields

Filters area

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

Field	Description
<input type="button" value="Add to Favourites"/>	Press to add this report to your Portal favourites for easier access.
Date /	Select the date or date period to report on.
Date From and Date To /	
As of /	
Start Date and End Date	

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	Name of the site.
6wk Moving Avg Sales	Average weekly sales over the last six weeks.
Total Sales	Total sales for the week.
Retail Sales	Retail sales for the week.
Salon Sales	Salon sales for the week.
Scan Rate %	Percentage of items scanned, as opposed to keyed in manually, or selected via one-shot button.
Misc Sales	Sales that are neither retail nor salon for the week.

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.

Balance

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

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

Barcode

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

Batch (kit manufacture)

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

Batch (stock take)

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

Brand

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

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.

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.

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

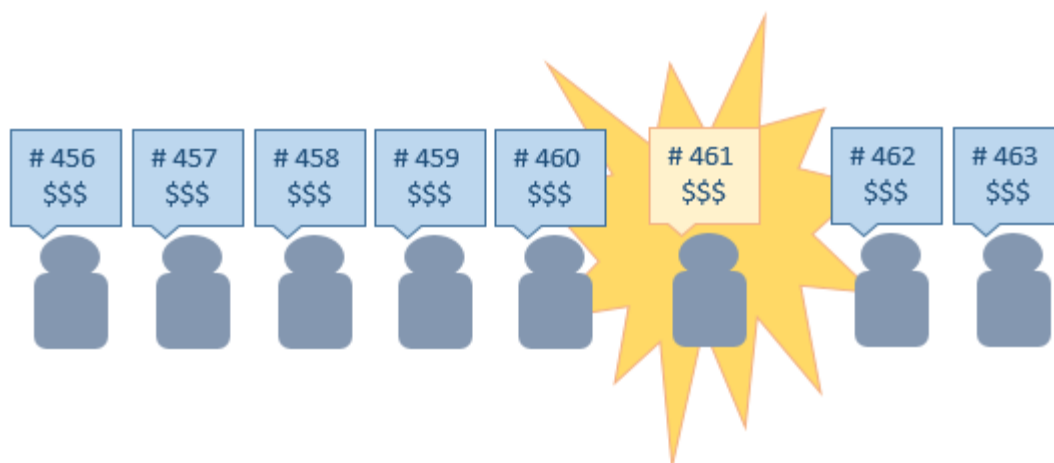
An item type is a way of categorising items for reporting purposes. Items can have only one type.

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.

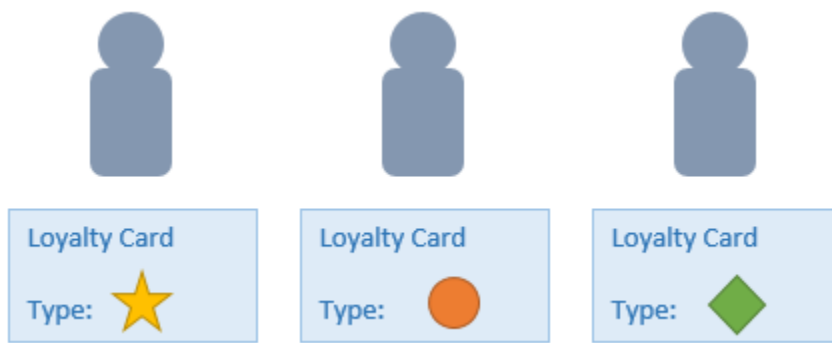
Loyalty card

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.

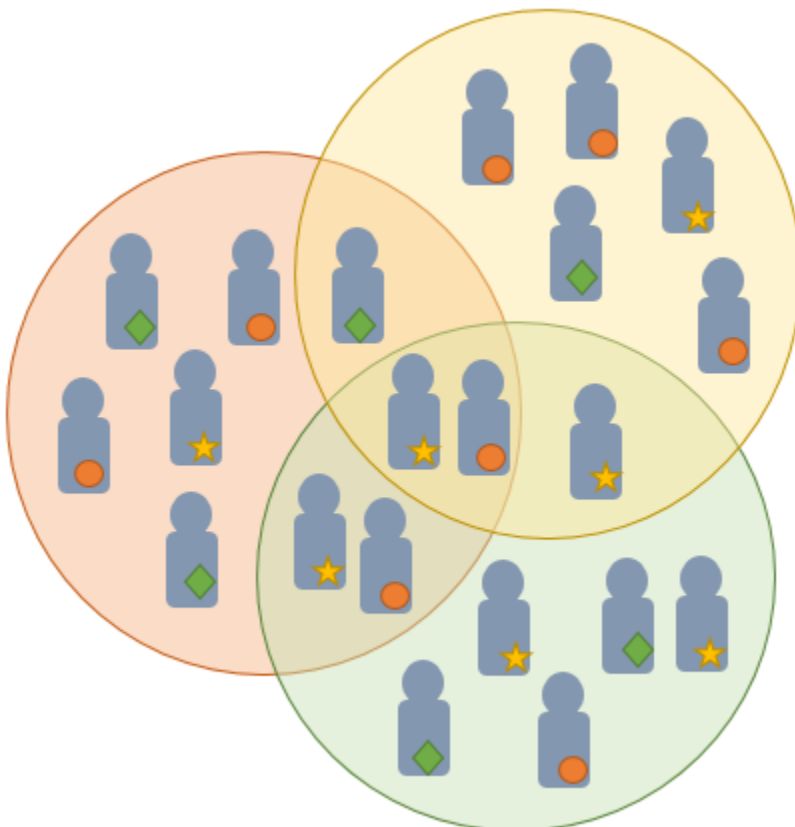


Loyalty department

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 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

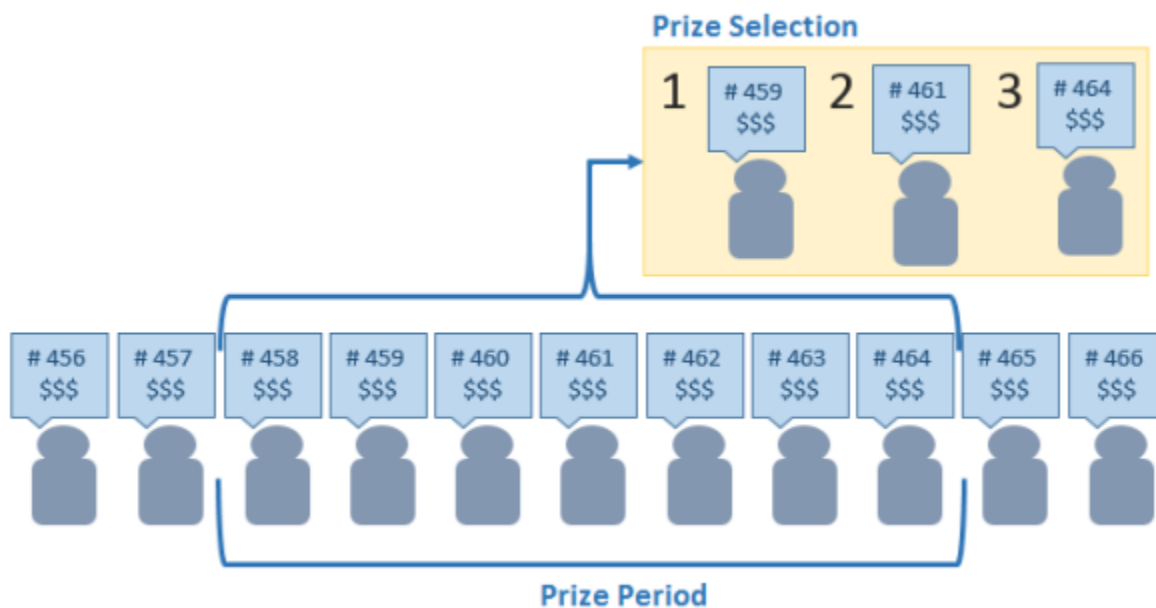
The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

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.

Selling item

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

Size

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

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

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.

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.

Rewards card (i)	
Brian Smith	
Ch & Veg Stirfry 3.992kg N x \$7.99/kg	\$31.90
Gift Voucher recharge	\$50.00
Banana Muffin	-\$2.57
Coffee, Latte	\$3.42
Extra sugar	
Skinny Milk	
Rewards card discount	-\$3.27
Total:	\$79.48
Cash	\$50.00
Credit Card	\$34.10
Rounding	\$0.02
Change	\$4.60

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 rechargeable, 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.