

12/1/20 POS RELEASE NOTES



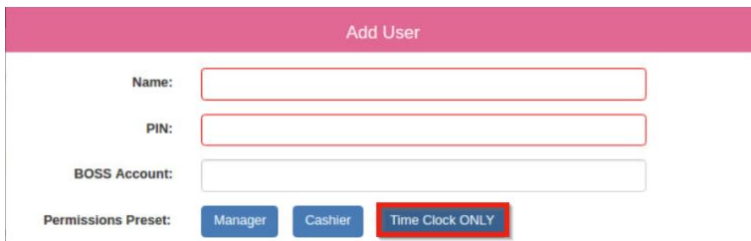
EMPLOYEE TIME CLOCK MANAGEMENT

Time Clock Management is a Premium Feature that requires a monthly subscription. This feature allows you to track the time and attendance of your employees, both POS Users and “Time Clock Only” users. Reporting features on the merchant portal allow you to create settings for your store and accounts for employees’ activity and hours worked, that can be exported to Excel or CSV format.

By default, any employee set up as a POS user (as Manager or Cashier) will be silently clocked into the POS as they log in. If the employee is set as Time Clock ONLY then the POS will track their Clock in/out hours without allowing access to the POS. All users can also track work breaks and lunch breaks.

Permission Preset Options

A new **Time Clock ONLY** permission preset has been added to the Manager and Cashier profiles in the User Tile. Time Clock ONLY is for employees that are not ringing sales and finalizing transactions within the POS. Examples of Time Clock ONLY employees would be stock personnel, cleaners and custodians.



The screenshot shows the 'Add User' form with the following fields: Name, PIN, and BOSS Account. Below these fields, the 'Permissions Preset' section shows three options: Manager, Cashier, and Time Clock ONLY. The 'Time Clock ONLY' option is highlighted with a red border.

Creating Time Clock ONLY Employees

To create employees for the Time Clock Management feature, select the Users tile on your main screen. ***This can be done from the POS and the Merchant Portal.**

Once in **User Management**, tap **Add a New User**.



The screenshot shows the 'User Management' screen with a search bar and a button labeled 'Add a New User...'. The button is highlighted with a red border.

Select **Time Clock ONLY**.

When creating **Time Clock ONLY** employees, these types of employees are intended to clock into the software - and that's it. Time Clock Employees will have no further access to the features within the POS. This was done by design. Rule of thumb: Keep preset permissions and hit **OK**. Keep in mind the POS will not allow you to select any other permissions as they are disabled under this preset.

Add User

Name:

PIN:

BOSS Account:

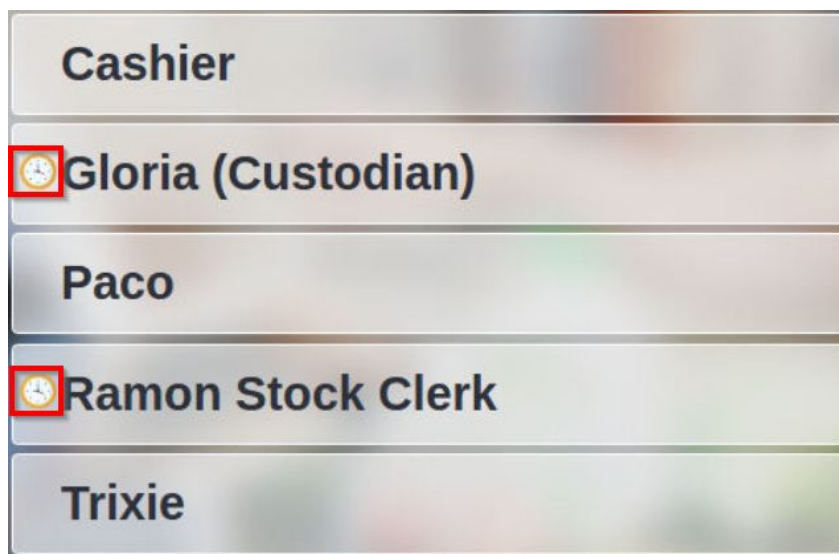
Permissions Preset: Manager Cashier Time Clock ONLY

Permissions:

REGISTER	<input type="checkbox"/> No Sale <input type="checkbox"/> Receipts <input type="checkbox"/> Permanent Price Change <input type="checkbox"/> Racs Manager <input type="checkbox"/> Credit Debit Payment	<input type="checkbox"/> Vendor Payout <input type="checkbox"/> Refund <input type="checkbox"/> Price Adjust <input type="checkbox"/> Cash Payment <input type="checkbox"/> Ebt Payment	<input type="checkbox"/> Cash Drop <input type="checkbox"/> Add New Item <input type="checkbox"/> Brportal <input type="checkbox"/> Check Payment
STORE STATS	<input type="checkbox"/> Store Report <input type="checkbox"/> View Cc Report	<input type="checkbox"/> All Shift Report	<input type="checkbox"/> Own Shift Report
VENDORS	<input type="checkbox"/> Add <input type="checkbox"/> Edit <input type="checkbox"/> Disable	<input type="checkbox"/> Add <input type="checkbox"/> Edit <input type="checkbox"/> Disable	<input type="checkbox"/> Add <input type="checkbox"/> Edit <input type="checkbox"/> Disable
USERS	<input checked="" type="checkbox"/> Manage Own Profile <input type="checkbox"/> Edit <input type="checkbox"/> Disable	<input checked="" type="checkbox"/> Manage Own Pin <input type="checkbox"/> Manage Permissions <input type="checkbox"/> Edit Br Account	<input type="checkbox"/> Add <input type="checkbox"/> Manage User Pin
IN STORE ITEMS	<input type="checkbox"/> Add <input type="checkbox"/> Edit	<input type="checkbox"/> Delete	

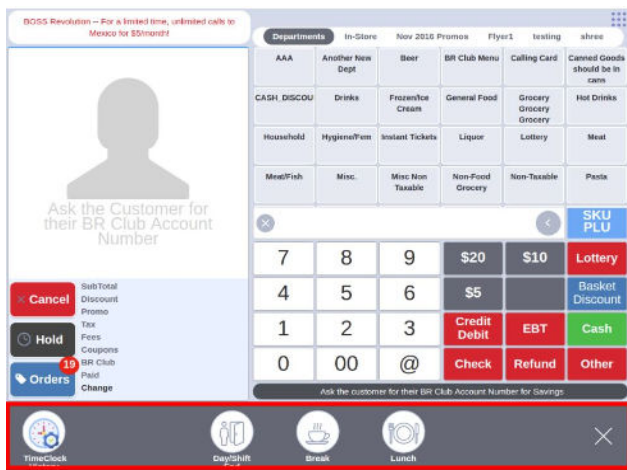
Cancel
OK

Once a Time Clock ONLY employee is added, the ***clock icon*** will appear next to the employee name.



Clock-in and out flow for regular users of the POS

When an employee who is set up as a POS user (Manager or Cashier) logs in into the POS - *clock in* is processed silently - recording their log time in the system. Either from the register screen or the main menu tiles where logout will be available - a footer slide bar is displayed inviting users options for clock out.

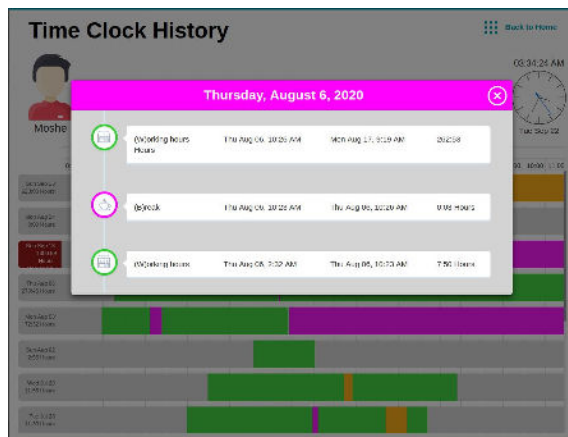
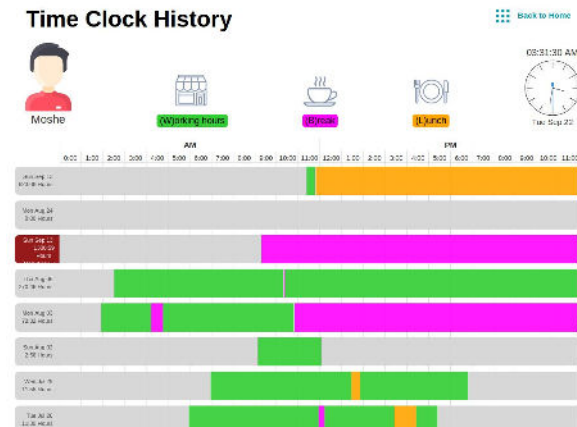


Pressing either 'Day/Shift', 'Break' or 'Lunch' button will record their clock out time stamp. The X button can still make them abandon the logout process.

If the 'track open/close cash' option is set in the settings page of the POS - then prior to logout the paypoint close screen is displayed - and only if the 'Save and Logout' button is pressed - the clock time stamp record occurs. This effectively closes the shift for the POS user.

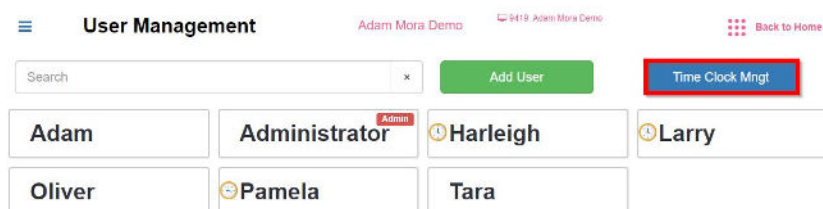
The left button 'Time Clock History' brings the logged in user to his specific Time Clock History screen, listing his latest days *clock in* and *outs*. Clicking on a day row will display the detailed log times items in descending order.

The purpose of this Time Clock history is mainly to allow users to check their times and in case of errors or missed clock in/out, inform their manager so corrections can be made on the Merchant Portal by administrator or manager.



Accessing Reports for the Time Clock Management on the Merchant Portal

Administrator or Manager can select 'Time Clock Mngt' from the User Tile in the Merchant portal. Tap the 'Time Clock Mngt' button then navigate to **settings** tab and configure the **work parameters defaults**.



Settings is where merchants can define default settings for store hours, and minimum hours an employee can work. If there are employees that fall outside of the **Store default settings**, the

default settings can be reset for each employee. Select an employee and a new window to the Time Clock Management page will open up to enter the employee settings.

User name	Shift	Date	Duration	Status	Breaks	Breaks included
Adam	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Administrator	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Harleigh	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Larry	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Oliver	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Pamela	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Tina	12:00 AM	12/01/2020	12:00	00:00	00:00	✓

Reports with warnings enabled, export and filter capability

Reports provide **daily**, **weekly**, and **monthly** reports and export to Excel or CSV file format for accounting purposes.

A filter option is provided to expedite merchant's review of specific employees.

User name	Shift	Date	Duration	Status	Breaks	Breaks included
Adam	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Administrator	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Harleigh	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Larry	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Oliver	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Pamela	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Tina	12:00 AM	12/01/2020	12:00	00:00	00:00	✓

Warnings will indicate:

- Shifts that have exceeded or did not meet minimum hours defined
- Users not clocking out
- Extended Breaks

Adjustment Scenarios

- Store Owners can adjust errors in reports and rectify entries that are tagged with an edit icon accordingly. If hours for an employee overflow into the next day, that entry will need to be deleted a new entry will have to be inserted to fix the appropriate hours worked**
- If employees are clocked into the POS and a reboot has taken place or the employee has forgotten to clock out. You will have to clock the employee out at the POS and then navigate to the Merchant Portal edit the times accordingly so it reflects the actual hours worked.

Administrators have the ability to see all clock in/out detail by accessing the **User Tab** in the Merchant Portal. This is where the merchant can see all his employees and the 'granular' view of activity.

User name	Shift	Date	Duration	Status	Breaks	Breaks included
Adam	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Administrator	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Harleigh	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Larry	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Oliver	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Pamela	12:00 AM	12/01/2020	12:00	00:00	00:00	✓
Tina	12:00 AM	12/01/2020	12:00	00:00	00:00	✓



ADVANCED DATA ACCESS - Including Profit and Cost

This is a subscription Premium Feature that requires signup for use. **Advanced Data Access** will allow you to see **Gross Profit** based on items that you have set up with a **Cost**. This feature can be used whether or not you track those items with the inventory feature.

To enter the cost for an item, navigate to Pricebook Management, select an existing item or select **Add** item if you are adding a new item to the pricebook. Two new fields have been included allowing you to specify a unit cost, or the cost of a box, case, or other known quantity. If the quantity is greater than one, the system will compute the unit cost. This allows you to specify unit costs that are not whole cents (i.e. 3 for \$1.00) ***Note the cost field is also available when Adding items on the fly at the Register Screen***

UPC: 04116703104

Item Desc: Cortizone-10:Eczema and Itchy, Dry Skin Size: 3.50 OZ

Department: Vitamins/Medicine

Variable Price: ☐ No (Price will be set at checkout time)

Price: 1 item for \$9.00

Cost: 0 item for \$0.00

EBT Eligible: ☐ Yes ☐ No ☐ Drgt

Sold by weight: ☐ No

Price includes taxes (if applicable): ☐ No

Price includes fees (if applicable): ☒ Yes

Fee multiplier (if applicable): 1

Inventory: In Stock: 100

Buttons: Cancel, Delete, Receive, OK

Inventory Tracking Cost Entry

Currently, when you click **Receive** on Inventory Tracking, you can also (optionally) enter the cost. If you enter the cost when receiving inventory be sure to provide total units and total cost so cost calculation is done correctly. If the cost is edited from the Pricebook or the Merchant Portal, the software will use the most recent adjustment recorded.

Receiving Inventory

Cortizone-10:Eczema and Itchy, Dry Skin

TOTAL UNITS RECEIVED: 90

# Cases	# Cases	Units/case	Units/case
Total	90		
Total Cost	\$900.00		

UNIT PRICE: \$10.00

Buttons: Cancel, OK

Once **cost** has been configured with your items, the **Pricebook Management** screen will now show **cost** and **gross profit** associated with your items.

Pricebook Management

[Back to Home](#)

Search: cortizon | x Departments Modifiers Add Item Multi Select -

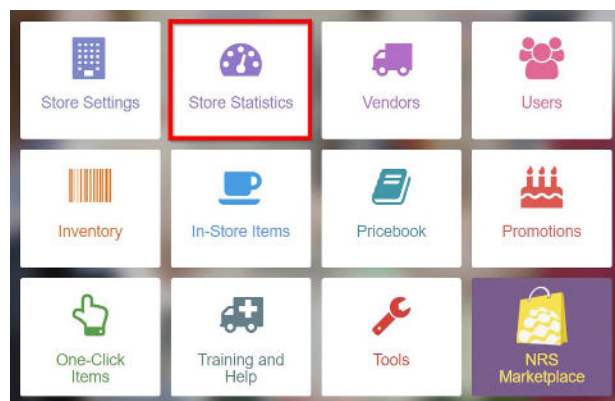
UPC/PLU	Department	Description	Stock	Promos	Gross Profit	Cost (USD)	Price (USD)
041167033104	Vitamins/Medicine	Cortizone-10/Eczema and It...	-		\$4.00	\$5.00	\$9.00

The above changes will take place on the **POS**, the **Merchant Portal**, and will eventually show on the **Merchant App**, when it is updated.

Advanced Data Reports

These are available on the merchant portal.

Select the **Store Statistics** Tile



Store Statistics Adam Mora Demo [Back to Home](#)

Date Range: Today

Dashboard Store Report Shift Report Print

Baskets	Items	Net Sales	Avg Items	Avg Sale	Scan Ratio
1	3	\$4.69	3.0	\$4.69	100.0%

Payments

Method	Baskets #	Baskets %	Payments	Payments %
Cash	1	100%	\$5.10	100%
Check	0	0%	\$0.00	0%
Credit/Debit	0	0%	\$0.00	0%
ePaid	0	0%	\$0.00	0%
EBT SNAP	0	0%	\$0.00	0%
EBT CASH	0	0%	\$0.00	0%
BR Club Promo	0	0%	\$0.00	0%
Total	1	100%	\$5.10	100%

Net Product Sales

Department	#	Amount
Drinks	2	\$3.69
Misc	1	\$1.00
Total	3	\$4.69

Net Other Sales

Department	#	Amount
Total	0	\$0.00

Data Adam Mora Demo [Back to Store Statistics](#)

Sales Item Sales Department Sales Details Profit Graphs

When you click on the **Data** button, and have subscribed to this feature, you will have access to 4 additional types of reports to better analyze the sales of your store: Item Sales Tab, Details, Profit and Graphs.

The **Item Sales tab** shows an entry for each item (including PLU items) summarized by the period covered, whether it be daily, weekly, monthly, etc.

Date Range

Custom

▼

11/15/2020

📅

12/02/2020

📅

🔄

Search:

CSV Download

Date	Department	UPC	Item	# of Baskets	# of Items	Avg Items	Sales \$	Avg Sale	Scan Sales
	Alcohol	031259017563	Phebus	5	45	9.0	\$450.00	\$90.00	\$450.00
	Alcohol	739949010626	Azevedo vinho verde	2	10	5.0	\$100.00	\$50.00	\$100.00
	Alcohol	899911000465	New Age:White Table Wine 750.00 ML	3	21	7.0	\$210.00	\$70.00	\$210.00
	Ck cashing fee			1	1	1.0	\$3.00	\$3.00	\$0.00
	Dairy	048001353855	Hellman's Mayo w/Olive Oil 20 oz	1	5	5.0	\$29.95	\$29.95	\$29.95
	Dairy	078354303559	Cabot:Greek Style Plain 2.00 LB	1	8	8.0	\$55.92	\$55.92	\$55.92
	Dairy	747479000079	Rao's Homemade:All-Purpose Tomato Sauce 24.00 OZ	1	10	10.0	\$70.00	\$70.00	\$70.00
	Dairy	813636022205	Califia	2	17	8.5	\$101.83	\$50.91	\$101.83

In the **Details Report**, you can see individual item sales along with UPC, and the date and time of the sale. The dark line between groups of items represents the end of a basket.

Date Selection:

Custom

▼

11/15/2020

12/02/2020

Search:

CSV Download

Entered	Dept	UPC/PLU	Item	Qty.	Amt \$	Discount	Promo	Verified Age	EBT Sales \$
11/16/2020 03 PM	Meat/Fish			1	\$500.00				\$0.00
11/16/2020 03 PM	Drinks	075720000616	Poland Spring 1L 1.00 LT	1	\$3.12				\$0.00
11/16/2020 03 PM	Drinks	075720481279	Poland Spring 16.9 oz 16.9 oz	1	\$1.66				\$0.00
11/16/2020 03 PM	Drinks	070847029014	monster juice mango loco 16 Oz	1	\$1.76				\$0.00
11/16/2020 03 PM	Drinks	070847811169	Monster Energy Drink 16 FL	1	\$2.86				\$0.00
11/16/2020 03 PM	Drinks	499019510226	Large Coffee 16 oz	1	\$2.31				\$0.00
11/16/2020 03 PM	Drinks	499019510226	Large Coffee 16 oz	1	\$2.31				\$0.00
11/16/2020 03 PM	Drinks	499019510226	Large Coffee 16 oz	1	\$2.31				\$0.00
11/16/2020 03 PM	Hot food	202235000002	Chilli Dog	1	\$2.99				\$0.00
11/16/2020 03 PM	Hot food	202061000009	Enchilada	1	\$7.00				\$0.00

In the **Profits Report**, you can see sales of individual items summarized by the period selected and their corresponding profit. You can sort by the columns using the small up/down arrows to the right of each column name.

Sales

Item Sales

Department Sales

Details

Profit

Graphs

Profit Report

3 Records

Date Range

Custom

12/01/2020

12/01/2020

Search:

CSV Download

Date	UPC	Name	Qty	Pricebook	Discount	Gross Sales	Cost/Unit	Gross Profit
	499019510141	Small Coffee	8	\$11.76	\$0.26	\$10.79	\$0.75	\$4.79
	499019510226	Large Coffee	13	\$30.03	\$0.84	\$29.19	\$1.00	\$16.19
	499019510301	Frijol	8	\$8.00	\$0.20	\$7.80	\$0.50	\$3.80

Showing 1 to 3 of 3 entries

Previous

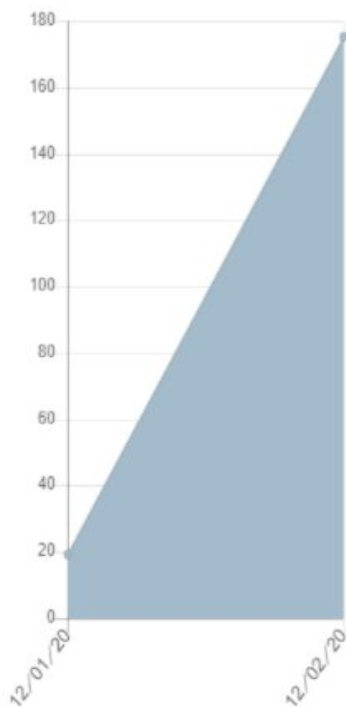
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Next

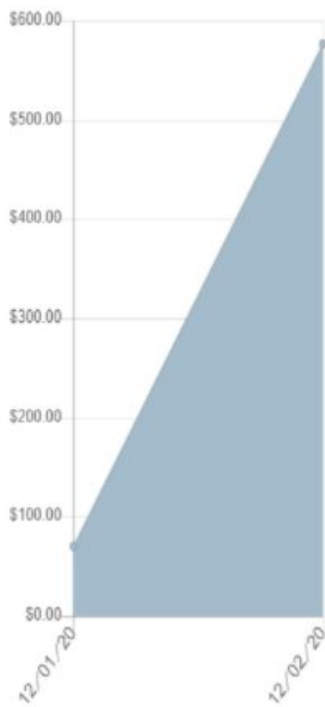
In the **Graphs** tab you can view Sales sorted by quantity of items, revenue and profit. This gives you a better view of your most sold items, most revenue from items, and most profitable items, respectively. Clicking on a specific item, shows you the sales for just that item.

In all the Data reports now, the CUSTOM date range setting aggregates the data into one line per displayed item. This option is not available on Graphs

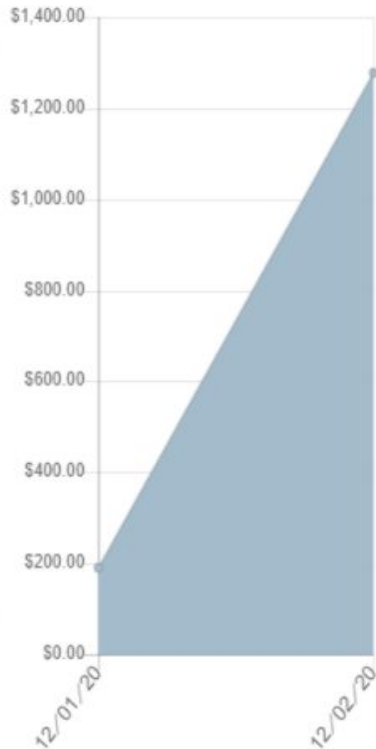
Sales by Date - Quantity of Items



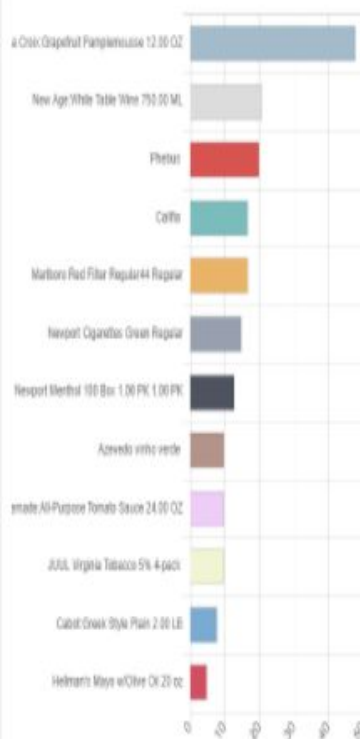
Sales by Date - Profit



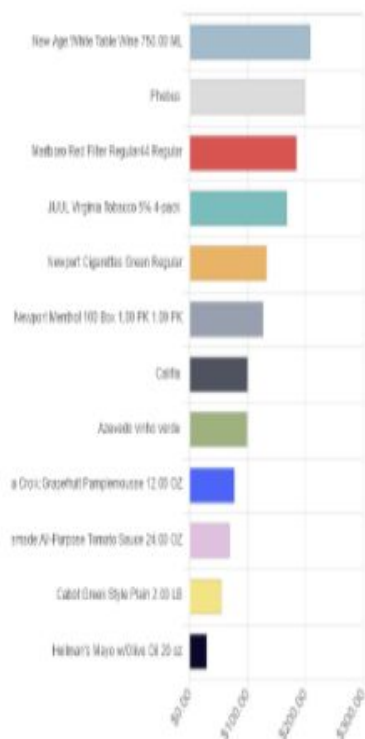
Sales by Date - Revenue



Sales by Item - Quantity of Items



Sales by Item - Revenue



Sales by Item - Profit

