Contents

1 Ad Hoc Item

Allows purchase of an item that has not been created as a stock item in Total Control.

1. Click on the 'Add Hoc' Item button
2. Enter a description for the item (e.g. Tea Bags).
3. Enter a sale price for the item.
4. Press the 'OK' button.
5. The item is added to the item list for purchase.

2 Add Cash to Event Account

Allows the user to add an amount paid by the Patron in cash to a selected Event Account for use later to purchase stock items using the Event Account.

1. Select the event account required using the '**Select Event**' button.
2. Press the 'Add Cash to Event Account' button
3. Enter the cash amount to add to the selected event account.
4. Select the patron associated with the event account.
5. Press the 'OK' button.
6. On completion of this transaction the Event Account's balance will reflect the amount added.

3 Add Cash to Personal Account

Allows the user to add an amount paid by the Patron in cash to their Personal Account for use later to purchase stock items using their Personal Account.

1. Select the required Patron using the '**Select Patron**' button.
2. Press the 'Add Cash to Personal Account' button
3. Enter the cash amount to add to the selected Patron's personal account.
4. Press the 'OK' button.
5. On completion of this transaction the Patron's personal account balance will reflect the amount added.

4 Add Cash to Selected Account

Allows the user to add an amount paid by the Patron in cash to a selected Account for use later to purchase stock items using that Account.

1. Select the required Patron using the '**Select Patron**' button.
2. Press the 'Add Cash to Selected Account' button
3. Select the required account belonging to the Patron.
4. Enter the cash amount to add to the selected account.
5. Press the 'OK' button.

6. On completion of this transaction the Patron's selected account balance will reflect the amount added.

5   Cancel Item

Remove the selected stock item from the item list.

6   Cancel Transaction

Remove all stock items from the item list and set the POS state ready to start a new transaction. If a Patron had been selected, that Patron's details will be removed and the POS returned to a cash transaction state.

7   Change Layer

Change the button layer currently displayed on the POS. E.g. a button named 'Wines' associated to the 'Change Layer' function would display the 'Wine' layer when pressed. The 'Wine' layer would contain a button for each wine in stock to be purchased.

8   Exit POS

Exit the Total Control Point of Sale System.

9   Load Transaction

Load a previously saved transaction. See '**Save Transaction**' for a description of saving a transaction for future use.

1. Press the 'Load Transaction' button.
2. Select the transaction to load from the list.
3. The transaction details are added to the item list for purchase.
4. Continue adding stock items for purchase or finalise the transaction with payment.
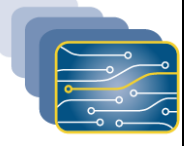
10 Login

Enable an authorised user to login to the Total Control POS. A user can login in a number of ways:

- Using a card or wrist band
- Using a Staff Number
- Using a User Name and Password (Note: press the 'Mode' button to display a QWERTY keyboard for User Name and Password input.

11 Logout

Logs the current user out of the Total Control Point of Sale System.

12 No Sale

Opens the cash drawer. The state of the POS is not affected. Any current transaction will remain untouched.

13 Open POS Designer

Execute the Point of Sale Designer application to enable the configuration of the POS template.

14 Override Price

Override the set price of the selected stock item. Note that any subsequent selections of this stock item will still be at the set price defined in the Total Control Stock Administration system.

5. Select the required stock item.
6. Press the 'Override Price' button.
7. Enter new amount to be charged.
8. Press the 'OK' button.
9. The price displayed in the item list for the selected item will be updated to the new amount entered.

15 Pay with Card

Pay for the current transaction using the selected Patron's account funds.

1. Patron presents their card or a Patron is selected using the '**Select Patron**' button.
2. Press the 'Pay with Card' button.
3. Patron's account is debited by the transaction amount.

16 Pay with Cash
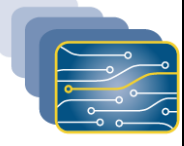
Pay for the current transaction using cash.

1. Press the 'Pay with Cash' button.
2. Enter the amount tendered by the Patron.
3. Return change to the Patron as directed by the Change Amount shown on the transaction summary.

17 Pay with Cheque

Pay for the current transaction using a cheque. The Patron can make out the cheque for the exact transaction amount (exact change) or for more than the transaction amount and have the difference return as cash (cash out).

1. Press the 'Pay with Cheque' button.
2. Select either the 'Exact Change' or the 'Cash Out' button.

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3. If 'Cash Out' selected; enter the cash amount Patron requires.
4. Return the cash out amount to the Patron as directed by the Change Amount shown on the transaction summary.

18 Pay with EFTPOS

NOTE: To use this function you must have an EFTPOS device supporting PC EFTPOS. Please contact support@monitorwa.com.au if you are unsure.

Pay for the current transaction using an EFTPOS device connected to TotalControl POS. The Patron can pay the exact transaction amount (exact change) or request to pay the transaction amount plus an amount to be paid to them in cash (cash out).

1. Press the 'Pay with EFTPOS' button.
2. Select either the 'Exact Change' or the 'Cash Out' button.
3. If 'Cash Out' selected; enter the cash amount Patron requires.
4. Return the cash out amount to the Patron as directed by the Change Amount shown on the transaction summary.
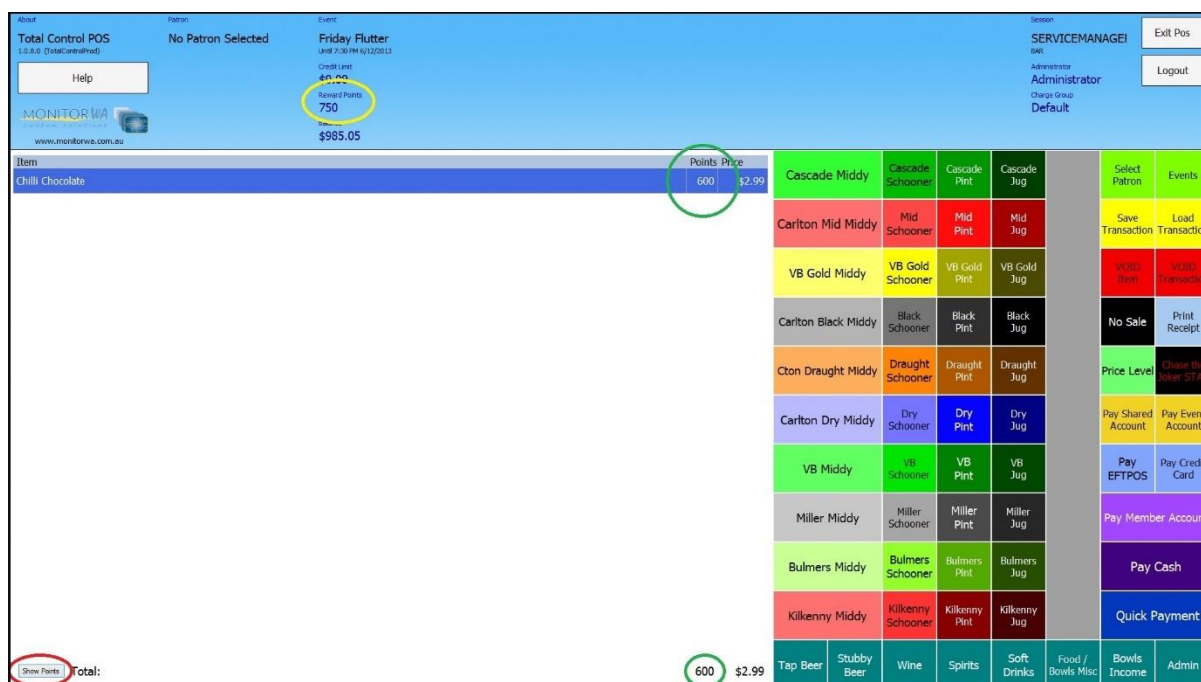
19 Pay with Event Account

Pay for the current transaction using the funds from an Event Account.

1. Press the '**Select Event**' button.
2. Select the required Event.
3. Press the 'Pay with Event Account' button.

20 Pay with Event Account Points

Stock items can be assigned a purchase points value and a sale points value. If a stock item has a sale points value of 100, then each time that stock item is purchased by an Event Account, the Event Account is rewarded with 100 points. This reward of 100 points is added to the Event Account's reward balance (shown below circled in yellow). To display the reward points in extended control panel view as shown below click anywhere on the control panel.

If a stock item has a purchase points value of 600 then it will cost the Event Account 600 points to purchase that item using reward points. To display the reward points cost of a stock item press the 'Show Points' button (shown below circled in red). The reward points cost of each stock item is shown next to its price and a total reward points cost is shown at the bottom of the item list next to the transaction total (both shown below circled in green).

1. Press the 'Show Points' button positioned in the bottom left-hand corner of the POS (shown above circled in red).
2. Press the '**Select Event**' button.
3. Select the required Event.
4. Expand the control panel at the top of the POS to display the Event Account's Reward Points Balance by clicking anywhere on the control panel (shown above circled in yellow)
5. Press the 'Pay with Event Account Points' button.

21 Pay with External Credit

Pay for the current transaction using a credit card.

1. Press the 'Pay with Credit' button.
2. Select the 'Approved' button if the transaction is accepted by the external device or select the 'Cancel' button if the transaction is rejected.

22 Pay with External EFTPOS

NOTE: This function assumes you have a stand-along EFTPOS device that does not support PC EFTPOS. Please contact support@monitorwa.com.au if you are unsure.

Pay for the current transaction using an external stand-along EFTPOS device. The Patron can pay the exact transaction amount (exact change) or request to pay the transaction amount plus an amount to be paid to them in cash (cash out).
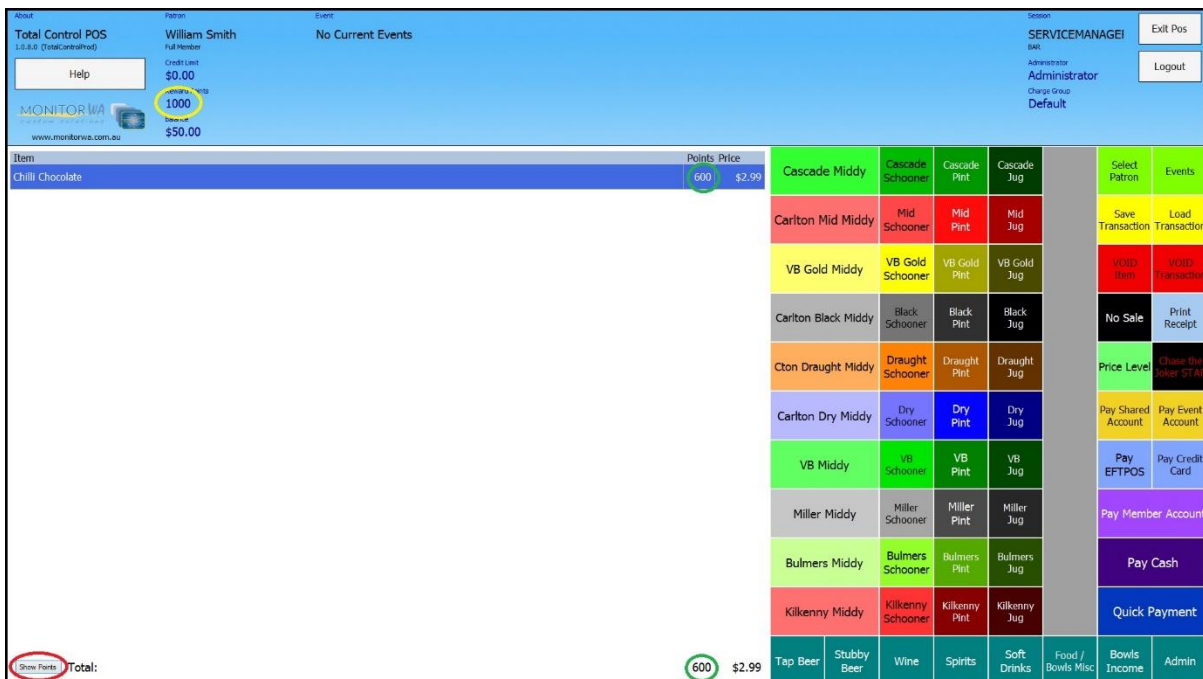
5. Press the 'Pay with External EFTPOS' button.
6. Select either the 'Exact Change' or the 'Cash Out' button.

7. If 'Cash Out' selected; enter the cash amount Patron requires.
8. Return the cash out amount to the Patron as directed by the Change Amount shown on the transaction summary.

23 Pay with Personal Account Points

Stock items can be assigned a purchase points value and a sale points value. If a stock item has a sale points value of 100, then each time that stock item is purchased by a Patron, the Patron's Account is rewarded with 100 points. This reward of 100 points is added to the Patron Account's reward balance (shown below circled in yellow). To display the reward points in extended control panel view as shown below click anywhere on the control panel.

If a stock item has a purchase points value of 600 then it will cost the Patron 600 points to purchase that item using reward points. To display the reward points cost of a stock item press the 'Show Points' button (shown below circled in red). The reward points cost of each stock item is shown next to its price and a total reward points cost is shown at the bottom of the item list next to the transaction total (both shown below circled in green).

1. Press the 'Show Points' button positioned in the bottom left-hand corner of the POS (shown above circled in red).
2. Patron presents their card or a Patron is selected using the '**Select Patron**' button.
3. Expand the control panel at the top of the POS to display the Patron's Reward Points Balance by clicking anywhere on the control panel (shown above circled in yellow)
4. Press the 'Pay with Personal Account Points' button.
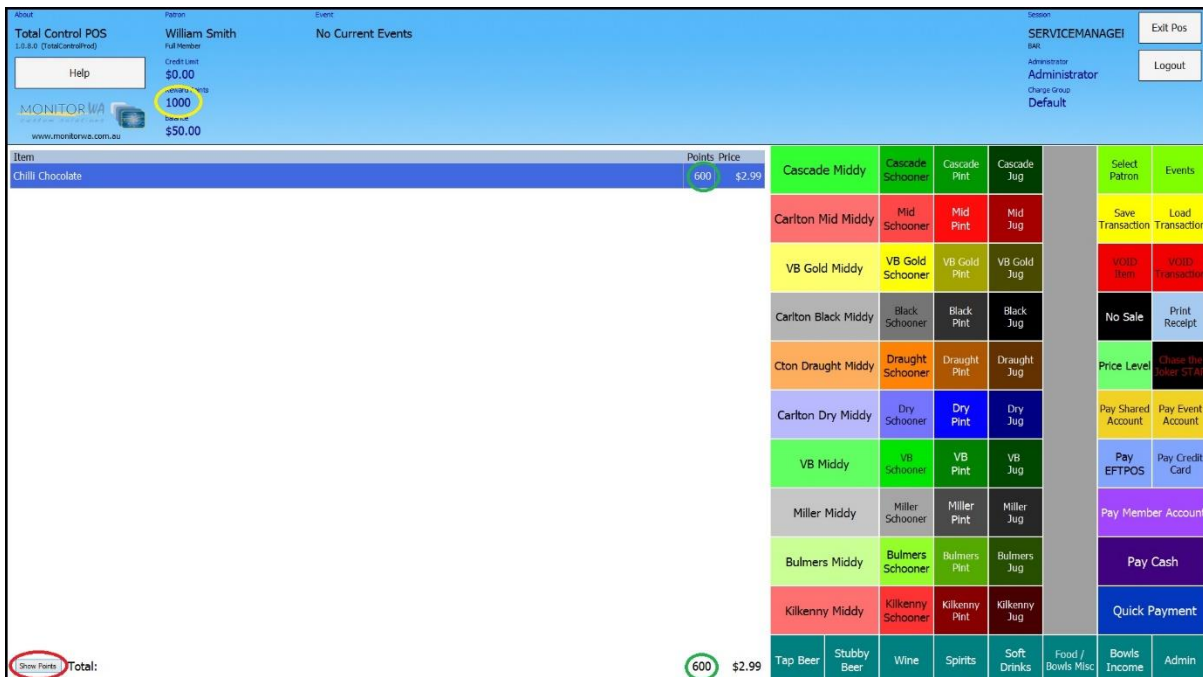
24 Pay with Selected Account

Pay for the current transaction using the funds from a Shared Account to which the selected Patron has access.

1. Patron presents their card or a Patron is selected using the '**Select Patron**' button.
2. Press the 'Pay with Selected Account' button.
3. Select the required Shared Account.
4. The selected Shared Account is debited by the transaction amount.

25 Pay with Selected Account Points

Stock items can be assigned a purchase points value and a sale points value. If a stock item has a sale points value of 100, then each time that stock item is purchased by a Patron's Shared Account, the Shared Account is rewarded with 100 points. This reward of 100 points is added to the Shared Account's reward balance (shown below circled in yellow). To display the reward points in extended control panel view as shown below click anywhere on the control panel.

If a stock item has a purchase points value of 600 then it will cost the Patron 600 points to purchase that item using reward points from a Shared Account. To display the reward points cost of a stock item press the 'Show Points' button (shown below circled in red). The reward points cost of each stock item is shown next to its price and a total reward points cost is shown at the bottom of the item list next to the transaction total (both shown below circled in green).

1. Press the 'Show Points' button positioned in the bottom left-hand corner of the POS (shown above circled in red).
2. Patron presents their card or a Patron is selected using the '**Select Patron**' button.

3. Press the 'Pay with Selected Account Points' button.
4. Select the Shared Account to use for this transaction

26 Print Receipt

Prints a receipt to the receipt printer for the last transaction.

27 Purchase Association

Enables the current Patron to purchase an Association Membership. A Patron may purchase multiple Association Memberships.

1. Patron presents their card or a Patron is selected using the '**Select Patron**' button.
2. Press the 'Purchase Association' button.
3. Select the required Association Membership.
4. The selected Association Membership is added to the items list for purchase.

28 Purchase Member Ticket Event Item

29 Purchase Membership

Enables the current Patron to purchase a Membership. A Patron may purchase only one Membership.

1. Patron presents their card or a Patron is selected using the '**Select Patron'** button.
2. Press the 'Purchase Membership' button.
3. Select the required Membership.
4. The selected Membership is added to the items list for purchase.

30 Purchase Stock
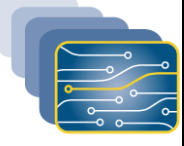
Adds the associated stock item to the items list for purchase. Note that generally multiple 'Purchase Stock' buttons will be available and named as per the stock item for purchase.

1. Select 'Purchase Stock' button (probably named as per the stock item).
2. The associated stock item is added to the items list for purchase.

31 Purchase Stock Variable Price

Enables a stock item to be purchased at a variable price. An example of this may be a raffle ticket which is sold at a different price during different events.

1. Press the 'Purchase Stock Variable Price' button.

2. Enter the required price.
3. The associated stock item is added to the items list for purchase at the required price.

32 Purchase Ticket Event Item

33 Quick Payment

Executes a default payment mechanism depending on whether a Patron has been selected. When a Patron presents their card or a Patron is selected using the '**Select Patron'** button the 'Quick Payment' button executes the '**Pay with Card**' function. When no Patron is selected the 'Quick Payment' button executes the '**Pay with Cash**' function.
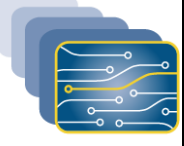
34 Refund

Refund a previous transaction. A refund can be performed for all stock items included in a transaction (full refund) or just some of the stock items included in a transaction (partial refund).

1. Press the 'Refund' button.
2. Use the search criteria fields to the left of the Refund screen to locate the transaction required to refund.
3. Select the transaction to refund from the list on the right of the Refund screen.
4. Press the 'Next' button.
5. All stock items purchased as part of the selected transaction are listed with a default of Selected as 'True'. This indicates they are marked for inclusion in the refund.
6. Select any stock items to exclude from the refund and change their 'Selected' state to 'False'. This indicates they are not marked for inclusion in the refund.
7. Depending on the transaction type (whether the transaction was paid for by cash, cheque, card etc.) the refund screen will prompt for the refund action.

35 Reimburse Expenditure

Enables a person to be reimbursed with cash from the POS when they have purchased items from elsewhere. For example, an employee may buy milk for the staff room but cannot be paid from petty cash.

1. Press the 'Reimburse Expenditure' button.
2. Select Expenditure Type (e.g. Medical).
3. Enter a description for the item (e.g. Bandaids).
4. Enter a price for the item.
5. Press the '**Pay with Cash**' or '**Quick Payment**' button.

36 Reimburse Expenditure (Quick)

37 Rentals

38 Reprint EFTPOS Receipt

Reprint the last EFTPOS receipt. NOTE: To use this function you must have an EFTPOS device supporting PC EFTPOS. Please contact support@monitorwa.com.au if you are unsure.

39 Save Transaction

Enables the current transaction to be saved so a new transaction can begin without the current transaction being lost. See '**Load Transaction**' for a description of how to reload a saved transaction.

40 Scan Card

41 Select Event

Enables an Event previously created in TotalControl Administrator to be set in the POS. Once an Event is set in the POS it stays active for every transaction until another Event is set. An example of an Event is 'Happy Hour'. A different charge group would be associated to the Event 'Happy Hour' so some or all of the stock items sold during this time would be charged at a different price.

Note: The difference between setting the POS to an Event and selecting a Charge Group is that an Event stays active for every transaction until another Event is set. Selecting a Charge Group stays active only for the transaction it is selected.

To activate an Event:

1. Press the 'Select Event' button.
2. Select the required Event from the list.
3. Event will stay active for every transaction.

To deactivate an Event:

1. Press the 'Select Event' button.

2. Select the Event named <NONE> at the top of the list.
3. The Event will no longer be active.

42 Select Patron

Enables a Patron to be selected for a transaction if the user does not have a member card to present to the card reader.

1. Press the 'Select Patron' button.
2. Enter the Patron's name or partial name in the Search field to reduce the number of Patrons listed.
3. Select the required Patron from the list.

43 Select Rental for Payment

44 Select Ticket Event

45 Server Status

46 Set Charge Group

Enables a Charge Group previously created in TotalControl Administrator to be selected for the current transaction. An example of a Charge Group is 'Take Away'. Some or all of the stock items sold for take away would be charged at a different price.
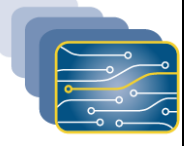
Note: The difference between setting the POS to an Event and selecting a Charge Group is that an Event stays active for every transaction until another Event is set. Selecting a Charge Group stays active only for the transaction it is selected.

1. Press the 'Charge Group' button **Note:** A Charge Group would have already been assigned to the button so the Charge Group button may be named as per the Charge Group such as 'Take Away'.
2. The selected Charge Group is displayed on the right-hand side of the Control Panel.

47 Set Credit Limit for Event Account

Allows a credit limit to be set for an Event Account. This enables either a club event or a private event such as a birthday party to purchase items on credit and settle the account at the end of the event.

1. Press the '**Select Event**' button.
2. Select the required Event from the list.
3. Press the 'Set Credit Limit for Event Account' button.
4. Enter the amount of credit to be assigned to the account.

The selected Event will remain active until it is deactivated. You can view the Event Account Credit Limit in the control panel when shown in extended view (click anywhere on the control panel to extend the view). When a Patron who is associated with this even wishes to purchase a stock item on the Event Account, the transaction should be finalised using the '**Pay with Event Account'** button . Patrons not associated with the Event can still purchase items. Ensure one of the payment functions other than '**Pay with Event Account**' is used to finalise these transactions.

Note: Care should be taken when setting up Event Accounts in TotalControl Administrator. If an Event Account is created using an existing Patron then the Event Account uses the same account as the Patron's Personal Account. It is advisable to create a Patron such as 'Event Patron' to be assigned to the Event Account. This ensures Personal Accounts and Event Accounts remain separate.

48 Set Credit Limit for Personal Account

Allows a credit limit to be set for Patron's Personal Account. This enables the Patron purchase items on credit and settle the account at a later time.

1. Patron presents their card or a Patron is selected using the '**Select Patron'** button.
2. Press the 'Set Credit Limit for Personal Account' button.
3. Enter the amount of credit to be assigned to the account.

49 Set Credit Limit for Selected Account

Allows a credit limit to be set for a Shared Account. This enables Patrons with access to the Shared Account to purchase items on credit and settle the account at a later time.

1. Patron presents their card or a Patron is selected using the '**Select Patron**' button.
2. Press the 'Set Credit Limit for Selected Account' button.
3. Select the required account from the list*****
4. Enter the amount of credit to be assigned to the account.

*Note: The Patron's Personal Account will be listed along with any Shared Accounts assigned to the Patron. The Patron must have previously been given access to the Shared Account in TotalControl Admin for the account to be listed.

50 Show Last Transaction

Displays details of the last transaction including all line items.

51 Show PC Eftpos Control Panel

52 View Transactions

Displays a list of all transactions. The View Transactions screen enables the transactions shown to be restricted by the search criteria fields to the left of the screen. The search defaults to displaying todays transactions only. Transactions displayed can be restricted using the following search fields:

- Transaction ID - Displays one transaction only as Transaction ID is unique.
- Patron – Displays all transaction for the selected Patron.
- POS – Displays all transaction for the selected POS (relevant only for sites using more than one POS.
- Payment Method – Displays all transactions finalised using the selected Payment Method.
- User – Displays all transactions created by the selected system user (the operator currently logged in to the POS).
- From and To Dates – Displays all transactions created within the specified date period.
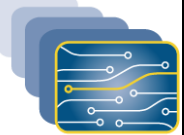
To view transactions:

1. Press the 'View Transactions' button.
2. Use the Search Criteria fields to the left of the screen to find the required transaction.
3. Double click the required transaction in the list or select it and press the 'Next' button.
4. The detail (line items) of the transaction are displayed.

53 Wastage

54 X-Read

Allows a 'Z Read' to be performed without closing off the POS. The following details are shown to enable the POS to be balanced:

- Total Cash since last Z Read
- Total External Credit since last Z Read
- Total External EFTPOS since last Z Read
- Total EFTPOS since last Z Read

- Total Cheques since last Z Read
- Total of all Payment Methods since last Z Read

55 Z-Read

Perform a 'Z Read' to close off the POS.

1. Press the 'Z-Read' button.
2. Press the 'Values' button to the right of the 'Cash' row
3. Enter each of the coin and note denominations and press 'OK'
4. Enter the 'Values' for each of the following payment methods where appropriate:
   a. External Credit
   b. External EFTPOS
   c. Cheque
5. The 'Expected' for each of the payment methods listed above will show the expected transactions and can be used to check if any 'difference' amount is shown
6. A comment can be entered against the Z Read by pressing the 'Comment' button at the bottom of the screen.