

[Main Page](#) > TouchOffice Web

Introduction

This section will become a comprehensive help guide and user documentation for TouchOffice Web.

The contents of this documentation are laid out below in the order the screens appear in the TouchOffice Web application. However, if you prefer, you can view an alphabetical index of the documentation in this category here ... [Category:TouchOffice Web](#)

TouchOffice Web Pages



[User Settings](#)

Allow you to set permissions on a per-user basis, including which widgets they will see on the Home page of TouchOffice Web when they sign in.



[Status: Pending Updates](#)

Provides information on pending/scheduled updates to be sent to tills

Status:   0 pending updates

Each section here corresponds to the main menu options in the TouchOffice Web interface. (See image, right)

[Home Page](#)

[Reports Page](#)

From here you can access and export all your reports, including [Clerks Reports](#), [Department Reports](#), [Financial Reports](#), [PLU Reports](#), [Stock Control Reports](#) and [Custom Reports](#)

[Products Page](#)

From here you can access details of all your programmed products

[Stock Page](#)

Access your **Stock List**, or use **Ins & Outs** to manually adjust stock levels

[Clerks Page](#)

Access and configure staff details along with fine-grained permissions for each user.

[Clerk Programming](#)

Lists each of your Clerks and allows quick editing of basic details. Clicking the clerk Number in the left hand column takes you to the **Clerk Details Programming** page for that clerk.

[Clerk Details Programming](#)

Allows you to configure every aspect of your clerk details, including fine-grained permissions and access to functions.

[Programming Page](#)

Access and configure all aspects of your Programming, such as [Department Programming](#) and [PLU Group Programming](#)

[Sales Page](#)

Access your sales data and Till Reports

[Terminals Page](#)

Access and configure details of your Terminals

Setting Up and Using TouchOffice Web

[Collecting Program Data](#)

[Main Page](#) > [TouchOffice Web](#) > User Settings

User Settings

From here you can **Add New User** or **edit permissions** for any user.

By default, the currently logged in user is selected. If you wish to edit permissions for another user, select the user from the drop-down box at the top of the page. The page will be refreshed to reflect the current settings for the newly selected user.

Once you have made edits to the user permissions, click the 'Save' button at the top of the screen.

User Permission Settings

Sites Available

Defines which sites the currently selected user will have access to within the application. E.g., it may be useful to allow staff members access to other sites than their own so that they have access to information regarding stock levels etc.

Page Permissions

This offers fine-grained access permissions to every page within the application. The majority of permissions are split into *view* or *edit* permissions.

View Home Page Widgets

Assuming permission has been granted in the **Page Permissions** section for the user to *View Home page widgets*, this section allows you to define exactly which of the available widgets the currently selected user is allowed to view. *Learn more about the Home Page Widgets in the [Home Page](#) section of this documentation.*

View Report Permissions

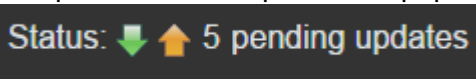
Define which of the available [Reports](#) the user is allowed to view.

Look and Feel

Allows you to define the skin they will use when viewing the application.

When changes are made to program data from within TouchOffice Web, the modifications are marked to be sent to each terminal in the site, or all terminals if changes are made in Head Office. If the changes were made in "Live" mode the modifications are flagged as pending, if the changes were made in "scheduled" mode the modifications are flagged as scheduled.

Clicking the updates icon will produce a pop up with the details of the items flagged to be sent to the

terminal. 

Pending and Scheduled Updates



There are 5 pending updates

Site	Terminal	Type	Record	Field	Value
1	Chris	PLU	1	NAME	Fortyniner
1	Chris	PLU	1	PRICE1L1	4.00
1	Chris	PLU	1	PRICE2L1	1.95
1	Chris	PLU	15	NAME	
1	Chris	PLU	15	RANDOMCODE	

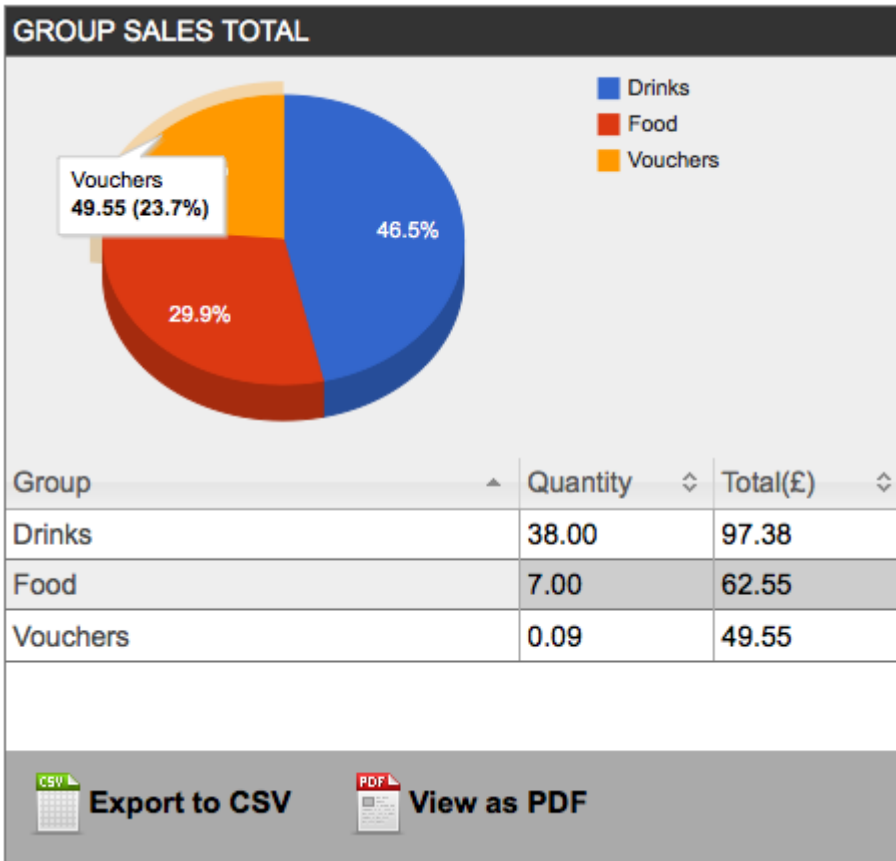
There are 0 scheduled updates

[Main Page](#) > [TouchOffice Web](#) > Home Page

Home Page

The Home Page contains a number of **Home Page Widgets** which give you a quick overview of filtered sales data.

Home Page Widgets



The Home Page Widgets available to any given user depend upon the viewing permissions available to that user, defined in [User Settings](#).

Where a widget contains graphical data, many have interactive elements; by hovering your mouse over a point in a graph or a section of a pie chart, for example, a tool tip will pop up showing you the data for that section (*see image, right*). Hovering over the key of any graphical data will highlight the related section in the graph.

Similarly, any data shown in columns can be sorted by clicking on the header of a given column. Click again to sort in reverse.

Filter Home Page Widget Reports

As with the main [Reports](#) page, you can filter the data shown in the various Home Page Widgets.

You can filter reports by site, for a multi-site operation, by selecting the site from the dropdown at the top of the page.

0 - Head Office

You can filter reports to a specific period either by entering a start and end time and date, or by clicking one of the Period Selector Shortcuts that automatically filter the data to a pre-defined period; e.g. Today, This Week, This Month

Today	Yesterday	This Week	Last Week	This Month	Last Month	This Quarter	Last Quarter
-------	-----------	-----------	-----------	------------	------------	--------------	--------------

You can also filter data to an individual Clerk, giving you the ability to assess staff performance at a glance.

Clerk:

Export Data

At the footer of each widget you have the option of exporting your data as a Comma Separated Variable file, for import into other software such as Excel, or save as a PDF (Portable Document Format), useful for emailing or archiving.

Re-order Home Page Widgets

Home Page Widgets can be moved around the page to suit your preferences using a simple drag-and-drop interface:

- Simply move your mouse over the Title Bar of the widget until the cursor changes to a cross
- click and hold your left mouse button and drag it to a new position on the page. Widgets will automatically 'snap' to the nearest available slot, and other widgets will interactively move to accommodate it as you drag a widget around the screen.
- When you are happy with the position, let go of the mouse button - your settings are automatically saved.

Available Widgets

Note: As mentioned, not all widgets might be available to all users, and the order may differ from this list due to the customisable drag and drop nature of the Home Page Widgets.

Transaction Keys

A summary and pie chart of transactions by defined Transaction Keys.

Finalise Keys

A summary and pie chart of transactions by defined Finalise Keys.

Fixed Totals

Clerks Breakdown

A summary and pie chart of transactions by each named Clerk.

Group Sales Total

A summary and pie chart of transactions by defined PLU Groups.

Department Sales Total

A summary and pie chart of transactions by defined Departments.

Hourly Breakdown

Gives you an at-a-glance breakdown of your **Total Sales (£)**, **quantity of sales** and **Average Sale (£)**

by hour of the day, for a period specified by your filter. You can also filter the report for All Clerks or an individual clerk, for easy comparison of sales performance throughout the business day.

Last 100 Sales

Summary of last 100 transactions, showing **Time**, **Sale ID**, **Site** and **Sale Total**. Note that the list is scrollable within the widget. As with most columnar data within TouchOffice Web, the sales data can be sorted by clicking on a column header. Click again to sort in reverse.

PLU Sales

See Also

[Main Page](#) > [TouchOffice Web](#) > Reports

Reports Page

Simply select the report type you wish to view from the drop down selector. The screen will refresh, including displaying the possible filter types for that particular report. You may then set any filters that you wish, and the data will update to reflect your filter options.

Features

Exporting and Printing Reports

All available reports may be exported or printed from TouchOffice Web.



Print this Report



Export to CSV



View as PDF

The options available to you are:

Export to CSV

Exporting to a Comma Separated Variable text file allows you to import it into a variety of other software, such as Microsoft Excel.

View as PDF

Download a copy of your report in the Portable Document Format. Useful for archiving or emailing copies of your reports.

Print this Report

Print your report directly from TouchOffice Web to any configured printer.

Filtering Reports

There are a number of ways you can filter your reports to retrieve exactly the information you require. The exact filters available to you will depend on which type of report you are running. Most reports include the following base filters:

- Site
- Start Date
- End Date
- Start Time
- End Time
- Clerk
- Price Level

Period Selector Shortcuts

Today	Yesterday	This Week	Last Week	This Month	Last Month	This Quarter	Last Quarter
-------	-----------	-----------	-----------	------------	------------	--------------	--------------

At the top of the Reports screen there are a number of Shortcuts that allow you to select predefined date ranges for your reports. These will automatically complete the Start Date and End Date filters for you.

These include:

- Today
- Yesterday
- This Week
- Last Week
- This Month
- Last Month
- This Quarter
- Last Quarter

Available Report Types

[Clerks Reports](#)

- Clerk List - A list of all current Clerks with their logon number and assigned iButton IDs
- Clerk Sales - A breakdown per clerk of Product Quantities sold and total values.

[Department Reports](#)

Reports to display bar graphs and pie charts of sales value of each defined Department, with a summary list of Quantity Sold and Total Value.

[Financial Reports](#)

A range of filterable financial reports

[PLU Reports](#)

[Stock Control Reports](#)

[Custom Reports](#)

See Also

There is a demonstration of the TouchOffice Web Reports section on the [ICRTouch Youtube Channel](#)

[Main Page](#) > [TouchOffice Web](#) > [Reports](#) > Clerks Reports

Clerks Reports

Clerk List

This is simply a list of all configured clerks, with their corresponding iButton and Secret Number. Filters have no effect over this report.

Clerk Sales

Gives a total of all sales, by quantity and total value, for all clerks who have made sales within the currently selected filter parameters.

This report can be filtered by any combination of:

- Site
- Clerks; individual or All Clerks
- Price Level - Any defined price tier structure or All Price Levels
- Date range - for any period, either using the Period Selectors or by defining Start and End Dates and times.

[Main Page](#) > [TouchOffice Web](#) > [Reports](#) > Department Reports

Department Reports

These report can be filtered by any combination of:

- Site
- Clerks; individual or All Clerks
- Price Level - Any defined price tier structure or All Price Levels
- Date range - for any period, either using the Period Selectors or by defining Start and End Dates and times.

Available Reports

Department Sales Bar Graph

Displays a bar graph of sales value of each defined Department, with a summary list of Quantity Sold and Total Value.

Department Sales Pie Chart

Displays a pie chart of sales value of each defined Department, with a summary list of Quantity Sold and Total Value

[Main Page](#) > [TouchOffice Web](#) > [Reports](#) > Financial Reports

Financial Reports

Filtering Report Data

The **Fixed Totaliser Sales**, **Fixed Totals Per Site** and **Fixed Totals Per Till** reports can be filtered by any combination of:

- Site
- Date range - for any period, either using the Period Selectors or by defining Start and End Dates and times.

The **Transaction Key Sales** report can be filtered by any combination of:

- Site
- Date range - for any period, either using the Period Selectors or by defining Start and End Dates and times.
- Clerks; individual or All Clerks

The **Batch Report**, **Department Sales** report, **Finalise Sales** report and **PLU Group Sales** report can be filtered by any combination of:

- Site
- Clerks; individual or All Clerks
- Price Level - Any defined price tier structure or All Price Levels
- Date range - for any period, either using the Period Selectors or by defining Start and End Dates and times.

The **Tax Sales** report and **Tax Sales Per Till** report can be filtered by any combination of:

- Site
- Clerks; individual or All Clerks
- Department - any defined department or All Departments
- Group - any defined group or All Groups

- Price Level - Any defined price tier structure or All Price Levels
- Date range - for any period, either using the Period Selectors or by defining Start and End Dates and times.

Available Reports

Batch Report

The Batch Report combines data from the **Fixed Totaliser Sales**, **Finalise Key** report, **Transaction Key** report and **Clerk Sales** report into one summary page.

Department Sales

Finalise Sales

Fixed Totaliser Sales

Fixed Totals Per Site

Fixed Totals Per Till

PLU Group Sales

Tax Sales

Tax Sales Per Till

Transaction Key Sales

[Main Page](#) > [TouchOffice Web](#) > [Reports](#) > PLU Reports

PLU Reports

Available Reports

PLU Price List

This report can be filtered by any combination of:

- Department - All Departments or any individual defined department
- Price Level - All Price Levels or any individual defined price level

PLU Sales

This report can be filtered by any combination of:

- Site
- Department - any defined department or All Departments
- Group - any defined group or All Groups

- Clerks - individual or All Clerks
- Price Level - Any defined price tier structure or All Price Levels
- Date range - for any period, either using the Period Selectors or by defining Start and End Dates and times
- Terminal - All terminals or any individual defined terminal

PLU Sales Dept and Group

This report is similar to the **PLU Sales** report described above, but additionally contains columns detailing the **Group** and **Department** for each product sale total.

The filters available for this report are the same as those for the PLU Sales report (*see above*)

'Top Sales' reports

All of the remaining PLU reports can be filtered by any combination of:

- Site
- Date range - for any period, either using the Period Selectors or by defining Start and End Dates and times.
- Department - any defined department or All Departments
- Group - any defined group or All Groups

Top 100 Sales By Profit

Top 20 Best Sellers

Top 25 Sales by Profit

Top 50 Best Sellers

Top 50 Best Sellers by Value

Top 50 Sales By Profit

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Stock Control Reports

Available Reports

Current Stock Report

Stock Movement Report

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Custom Reports

[Main Page](#) > [TouchOffice Web](#) > Products

Products Page

PLU Programming

The front screen of the Products page presents you with a paged list of all of your Products ordered by PLU. You can quickly edit the **Tax Rate**, or **Level 1 Price Tiers** for multiple items directly from the list. Once you have made changes, click **Save** at the top of the page to commit your changes.

If you wish to edit further details of a given product, click on the PLU number in the left hand column of the required product.

PLU Details Programming

Allows you to edit details of a product, including prices for all Levels, and Status Flags, Stock Control behaviour and Kitchen Printer configuration. To commit your changes, you must press the **Save** button at the top of the page. If you attempt to move away from the page without saving you will be alerted and prompted to save your pending edits.

Product Search

From the PLU Details Programming screen you can search for a specific PLU or group of products to edit.

You can search by:

- PLU Number
- PLU Description
- PLU Random Code
- PLU Group
- Department

If your selected search term returns more than one result, the first result will be displayed, with navigation links to the remaining records matching your search criteria.

The search terms in your filter are listed with a [x] next to them. Click the cross to remove a filter from your search.

Save

Rec 1 of 4

«First | Prev | Next | Last» Jump to page:

PLU Details Programming

 **Search** Current filter: **Name: coffee [x]** **Group: Drinks [x]**

FILTER COFFEE REGULAR (4)

Product Data

Product Name

Simply click on the product name at the top of the page and edit.

General

Define or edit the base details of any product.

- Group - Select a PLU Group to assign this product to
- Department - Select a department to assign this product to
- Random Code - Set a 20 digit random code that can be used to access this product; this is generally the barcode of a product, or could be used as Bin numbers for wine.
- Tax Rate - Select from defined Tax Rate options

Stock

Edit values and adjust stock levels for the product.

GP Target %

Here you can enter a target percentage of profit that you would like to make on the product. After calculating the average cost price and taking into account the taxable status of the product, TouchOffice will display the Recommended Retail Price in the RRP field.

GP Actual %

- Display only - *not user editable*

This field shows the amount of profit that is being made on the product at it's current price.

RRP

- Display only - *not user editable*

This is the recommended retail price, and is calculated from the **GP Target %** you have previously entered (*see above*).

Adjusting Stock Levels

Click the **+/-** key. A pop-up box will appear, and prompt you to select to either **Increase Stock By** or

Decrease Stock By and enter a quantity. You can also enter a **Reason for change**. Once you have made your edit, click **Update Stock**

Prices

Define or edit prices for 1st, 2nd and 3rd price for Level 1 to 9.

This is where the retail value is set. You can have up to nine different price levels per product. Each price level can also have a 2nd and 3rd sales value, for example for selling the same product at a different size. The 2nd and 3rd values are accessed by pressing the appropriate price shift key on the terminal or till.

Quantities

Define or edit 1st, 2nd and 3rd Quantity levels.

1st @ Quantity

Here you can define the quantity of the product when sold at the 1st@ price.

2nd @ Quantity

Here you can define the quantity of the product when sold at the 2nd@ price. For example, in the hospitality trade this would normally be used for a half pint price.

At the terminal or till, pressing the 2nd@ price shift button will show only products which have a quantity set here.

The Alternative text modifier directly below the 2nd @ Quantity can be used to provide an alternate description for the product when sold at the 2nd@ price.

3rd @ Quantity

Here you can define the quantity of the product when sold at the 3rd@ price. For example, in the hospitality trade this would normally be used for a double spirit measure price.

At the terminal or till, pressing the 3rd@ price shift button will show only products which have a quantity set here.

The Alternative text modifier directly below the 3rd @ Quantity can be used to provide an alternate description for the product when sold at the 3rd@ price.

Status Flags

Allows you to set a range of behaviours and parameters on a per product basis

Enable Zero Price Sale?

If enabled, the product can be sold with a price of zero.

PLU is Negative Price?

The price will be negated when it is sold.

Enable Preset Override? =

When enabled, prices can be typed directly into the button rather than adhering to the default price levels.

High digit Limit

When **Enable Preset Override** is set, you can restrict the number of digits that can be entered into the product price. For example, setting this value to 3 would allow prices up to £9.99 to be entered.

PLU is Condiment PLU?

The PLU will be sold as a condiment to the previous item.

PLU is Weight PLU?

When enabled, the price is assumed to be per Kg and not a quantity.

Prompt with notes?

For future use

Prompt with picture?

A picture of the product can be displayed when sold or enquired about.

Do not print on receipts or bills?

Prevents this product from being printed on receipts and bills. Usually used for cooking instructions.

Allow manual weight entry?

Allows the weight to be entered at the time of sale.

Enable SEL Printing?

Enabling this option will allow shelf edge labels to be printed for this product at the point of sale from the receipt printer.

Flag as Pending SEL?**Single item sale?**

When set, this product will automatically finalise the sale after registering. However, this only applies if it is the first product registered in the sale.

Set menu premium Item? (uses 3rd @ price)

When this item is registered as part of a Set Menu, the 3rd @ price of the product is added to the sale.

Prompt Customer Verification 1?

Prompt for the customer verification or warning that you have set up under Customer verification 1. These might be age verification checks, or a warning to the customer of potential allergies etc.

Prompt Customer Verification 2?

See above

Stock Control

Allows you to define whether stock control is enabled for a product and various parameters of stock control.

Maintain Stock

When enabled, the product will be subject to stock control functions. This is mainly used for restricting the sales of limited quantity 'specials'

Error when minimum stock reached?

When the stock level reaches the minimum stock level, the software will display an error message.

Inhibit sales when below minimum stock?

This prevents the product from being sold when their stock counter falls below the defined minimum stock level.

Display stock quantity on keyboard?

When enabled, the current stock level will be shown at the bottom of the button for the product on the keyboard.

Minimum Stock

Used in conjunction with **Error when minimum stock reached?** and **Inhibit sales when below minimum stock?** options (*see above*)

Kitchen Printers

Print To Kitchen Printer *n*

Determines which Kitchen Printers (between 1 and 8) this product will be printed to.

Print in Red on KP?

When enabled, the product will appear in red when printed on a kitchen printer.

Print to Kitchen Video 1 / Kitchen Video 2

Selects which kitchen videos the product will be displayed to.

Print to Ticket Printer 1 / Ticket Printer 2

Selects which Ticket Printer the product will be printed to.

KP Category

Products that print to a kitchen printer can be sorted into groups despite the order in which they are sold. e.g, all starters, main meals or desserts could be grouped by category.

Option Windows

List Box Link 1 to 6

These are drop down links that can follow the product, as defined in **List PLU Programming**. These are usually used to categorise a product, e.g. as a Starter, Main or Dessert, or for cooking instructions.

Windows stay until ESC?

When enabled, any defined Links above will stay on screen until Escape is pressed. If disabled, the option box will disappear when a choice is made.

Link 6 items enforced zero price

When abled, products linked to **List Box Link 6** will be sold at a zero value price.

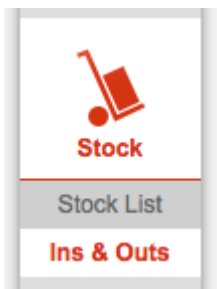
Selective Itemisers

Commission Rates

Determines whether the clerk will receive a commission for selling this product, based on the commission rates recorded against this clerk in the Clerk Programming screen.

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Stock Page



Stock List

Ins & Outs

Use a stock template

Add PLU

Adjust Stock

[Main Page](#) > [TouchOffice Web](#) > Clerks

Clerks Page

Clerk Programming

To edit details for a given clerk, click on the Number in the left hand column.

Clerk Details Programming

From here, you can tailor all details of an individual clerk. To commit your changes, click the **Save** button at the top of the screen. If you attempt to leave the page without saving changes, you will be alerted and prompted to do so.

To change the **Clerk Name**, simply click on the name at the top of the screen and edit.

General

Add or edit the **iButton Number** and **Secret Number** for this Clerk

Level Defaults

Here you can define what a given clerk will see when they first log onto the TouchPoint till.

Default Menu Level

When set, the clerk will jump straight to a specific menu level when they are signed on. If not set, they will go to the default for that terminal.

Default Price Level

When the clerk signs on, they are initially set to a specific price level.

Default Floorplan Level

Sets the level on the floor plan that this clerk will default to when they enter the floor plan. A setting of zero will go to the default for that terminal.

Example

For example, if the clerk is a drinks waiter in the upstairs bar lounge, you might configure their till to open at a **Default Menu Level** of 'Drinks', with a corresponding **Default Floorplan Level** of 'Upstairs Bar'.

If that particular drinks waiter always starts their shift to coincide with your 'Happy Hour' event, you may very well define their **Default Price Level** as such, too.

Commission

Define different tiered commission rates earned by this clerk.

Allowed Functions

This allows fine-grained permissions of various functions

Allowed Modes

Allows configuring permissions for various modes. For example, whether this clerk is allowed to enter Refund Mode or if they can run Manager Functions.

Options are:

- Reg Mode
- Refund Mode
- X Mode
- Z Mode
- Manager Functions
- Checkboxes for Program 1 through 6

Employee Job

Prompt to clock in at sign on

When enabled, if the employee is not clocked in when they sign on then the terminal will prompt them as to whether they want to clock in at that point.

Compulsory clocked in

When enabled, the employee cannot use the till unless they are clocked in.

Clerk Control

Configure parameters such as whether entering an order number is compulsory for all transactions, and whether a clerk should be signed off after a sale.

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Programming Page

Departments

Products are linked to a Department for reporting purposes.

Groups

Allows you to define the PLU groups that you wish to categorise your products in. E.g. Drinks, Food.

List PLUs

List PLUs are 'pop up' windows that appear on the terminal that allow you to prompt staff for certain choices. For example, in a set menu, they would allow selection of starters, main meal and dessert. Or they might prompt to ask a customer how they would like their steak cooked.

To add or edit products in a given PLU list, click the Number box for the required List Descriptor.

You will then be presented with a page containing the **List Box PLU Links**. Add or edit products by selecting them via the drop down lists containing all defined products, or simply start typing into the Descriptor box and the list of products will be filtered to your current search term.

When you have completed you edits, click the Save button at the top of the screen.

Starters (1)

List Box PLU Links

Link	PLU	Descriptor
1	50	[50] Soup Of The Day
2	51	[51] Potted Shrimps
3	52	[52] Terrine of Chicken
4	53	[53] Tempura Tiger Prawns
5	54	[54] Garlic Mushrooms
6	55	chic
7	0	[52] Terrine of Chicken
8	0	[55] Chicken Goujons
9	0	No PLU Selected
10	0	No PLU Selected

Mix & Match Programming

There are two different forms of Mix & Match available. Therefore there are two different Mix & Match Programming pages. The differences and configuration of each type are described below.

Mix & Match 1

Mix & Match 1 allows you to set up generic promotions (that is, where the promotion is available on a range of different products as long as specific criteria are met to fulfill the promotion requirements).

Examples of these might include

- '20% off when you buy 5 or more items'
- 'Any 3 for £20'
- 'Buy any 3 items and get the cheapest free'

Mix & Match Types

You can select from any of the following methods in constructing your Mix & Match promotion:

Discount Amount

A £ amount to be discounted from the total bill. (e.g, '£5 off when you buy any 3 items')

Discount %

A % amount to be discounted from the total bill (e.g. '10% off when you buy any 3 items')

Set Price

Overrides the price of the products and sets a total for the sale. (e.g. for a '3 for £20' type offer)

Discount amount cheapest

Discounts a £ amount from the cheapest item (e.g. 'get £2 off the cheapest item when you buy 3')

Discount % Cheapest

Discounts a % amount off the cheapest item (e.g. 'buy 3, get the cheapest half price')

Discount amount last item

Discount a £ amount off the last item (e.g. 'buy a starter and main course, get £3 off dessert')


Discount % last item

Discount a % amount off the last item (e.g. 'buy a starter and main course, get dessert free')

Example Mix & Match Promotion

In the example promotion below, We have set up a 'Buy three - get cheapest item free' offer by setting the **Discount Rate** to **100%** of Mix & Match type **Discount % Cheapest**, which is only true of Price Level 1 items (i.e. *'cannot be combined with any other offer'*), but only between 7pm and 9pm, Mondays through Thursdays.

Buy Three - 1 Free (1)

 Clear site values

General

Mix & Match Type Affects Tax Table Quantity Required

Amount / Discount Rate(%)

Include 2nd and 3rd @ items Include old items from checks Price Level 1 Items only

Warn user when table starts

Time Range

Only Available in Time Range

Start Time Range :

End Time Range :

Applies To:

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Mix & Match 2

Mix & Match 2 promotions are more specific. In addition to the criteria described for Mix & Match 1, you set up 'Buckets' which contain particular PLU products, where a specific quantity in each of those buckets have to be purchased in order to qualify for the promotion.

Examples of this kind of promotion might include:

- 'Buy two shirts and get a free tie'
- 'Meal Deal' type promotions where they can choose 1 x Sandwich, 1 x confectionary or crisps and 1 x drink for a fixed price
- 'Buy any two Star Wars movies on DVD and get 50% off a Star Wars T-shirt'
- 'Buy two bottles of wine and get a voucher for 20% off your next purchase'

Finalise Keys

Finalise keys are used to complete sales. Examples would include 'Cash' and 'Credit card'.

Flags

Opens drawer

Decides whether the drawer will open or not when this finalise key is used.

Enforce amount tendering

If set to yes, the operator must enter the amount tendered before pressing this button.

Automatic receipt issuance

If set to yes, regardless of whether the receipt is on or not, a receipt will be issued if this key is used.

Print tax breakdown

If there is any tax content in this sale, then this will be printed on the receipt.

Warn if a check is open

Compulsory Eat In / Take Out

System will prompt with a list of all Eat In/Take Out keys found in the Status Key file if one hasn't already been used.

Extra ticket with sig strip

If this finalise key is used then an extra receipt is issued with the signature strip bottom message at the bottom of it.

Inhibit Amount tendered

If set to yes, the operator cannot tender an amount before pressing this button.

Enforce subtotal

If set to yes, the operator must press subtotal before pressing this button.

Inhibit partial tendering

If set to yes, the operator cannot tender for less than the sale value.

Prompt for Cashback

Is euro finalise key

The finalise key becomes a EURO finalise key. All amounts tendered are in EUROS. Only applies to CASH, CHEQUE & EFT.

Prompt with keypad for tender

When set and no amount was tendered into the finalise key, the unit will popup a numeric keypad for amount to be tendered.

Compulsory non-add number

A non-add number must be entered if this finalise key is used, if one hasn't been entered, then the system will automatically press the first non-add key in the status key file for you, prompting for a number.

Update Keyboard Text?

When set to yes, any buttons set as this key will have their captions updated with the text in the descriptor field above. This will automatically change to yes whenever you change the descriptor field. You can force the caption to be updated by setting this to yes, and can prevent it being updated by setting it to no after you have changed the text in descriptor.

Status Keys

Examples of status keys might include menu level shifts and batch reports.

Transaction Keys

Transaction Keys are essentially categories of transaction types for the purpose of reporting on and grouping transactions. Examples of transaction keys would include discounts or error corrects.

Key Types

New Balance

Used to store away the currently open check/table.

Price Change

Used to temporarily change the price of an item.

Media Exchange

Changes 1 media for another at point of sale. eg Cheque for Cash.

Paid Out

Used to record monies paid out of the till.

Received on Account

Used to record monies received to the till

Deposit

Used to record deposit amounts into checks/tables.

Pay Account

Used to increase balances on account/prepaid customers.

+ Amount

Used to increase the current subtotal by an amount.

- Amount

Used to decrease the current subtotal by an amount.

+%

Used to increase the current subtotal by a % amount.

-%

Used to decrease the current subtotal by a % amount.

Exchange Points

Used to exchange customer loyalty points against the current subtotal.

Points Adjustment

Used to manually alter the number of points on a customer.

Refund

Used for refunding items (not necessarily in the current sale).

Cancel

Used to cancel the entire contents of the current sale.

Error Correct

Used to correct/void items out of the current sale.

No Sale

Opens the cash drawer.

Check Transfer

Used for transferring the contents of the current sale to a check, can also be used to transfer

tables/checks to checks.

House Bon

Used to sell items for free.

Flags

Not all of the flags detailed below are available for all Key Types. As you select a key type from the drop down box the available flags will be presented.

Allow price increase

This allows the operator to increase the price of the item.

Allow price decrease

This allows the operator to decrease the price of the item.

Allow preset override

This allows the operator to type in an amount and press the button.

Allow negative balance

Means that after use of this key, the current sale can fall into negative amount.

Adds to points? no, subtracts

When set this button is used to add points to the customer. When no it removes points.

Teendered amount is value

Determines whether what is tendered into this key is a monetary value or number of points to use.

Only one use per sale

Means that the button can only be used once in any one transaction.

Not allowed after st

Not allowed after an item

Auto new check

Selected item else next

Compulsory Eat In / Take Out

System will prompt with a list of all Eat In/Take Out keys found in the Status Key file if one hasn't already been used.

Force drawer 1

Opens cash drawer 1 regardless of the what the operator is set to.

Force drawer 2

Opens cash drawer 2 regardless of the what the operator is set to.

If both flags are set then both cash drawers will be opened, 1 after the other. if neither flag is set then the default for the operator is fired.

= Discount all PLUs

Means that all products are discounted regardless of the Selective Item Setting.

Discount SI1 to SI 5

Means that all products are discounted regardless of the Selective Item Setting.

show reason table

Complete line void

If yes error corrects by line, if no by item.

show reason table, item correction

The user is prompted with a reason table.

show reason table, voids

The user is prompted with a reason table.

Extra ticket with sig strip

If this transaction key is used at any time during the sale then an extra receipt is issued with the signature strip bottom message at the bottom of it.

update keyboard text

When set to yes, any buttons set as this key will have their captions updated with the text in the descriptor field above. This will automatically change to yes whenever you change the descriptor field. You can force the caption to be updated by setting this to yes, and can prevent it being updated by setting it to no after you have changed the text in descriptor.

Fixed Characters

Keyboard Menu Levels

Keyboard Allocation

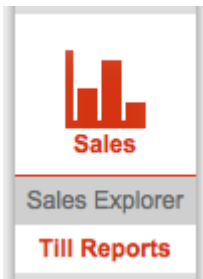
Upload a custom skin

Open the keyboard editor

Allows you to edit the keyboard layout for each of the defined **Keyboard Menu Levels**

[Main Page](#) > [TouchOffice Web](#) > Sales

Sales Page



From the Sales Page you can use the Sales Explorer to view filtered **Sales Data** for all Sales transactions, as well as filtered **Till Reports**

Sales Explorer

Sales Data

SALE ID: 1000043150514

SALES RECEIPT

SALES DATA

SALES RECEIPT

Steve	REG	Cloud Test
THURSDAY 15 MAY 2014		12:40 000043
1	Garlic Mushrooms	£4.55
1	Garlic Mushrooms	£4.55
1	Vension	£13.00
1	Vension	£13.00
1	Praline Torte	£5.00
1	Chocolate Brownie	£5.00
1	DOUBLE ESPRESSO	£2.00
1	DOUBLE ESPRESSO	£2.00
1	REGULAR SHOT OF SYRUP	£0.50
1	REGULAR SHOT OF SYRUP	£0.50

10 No

TOTAL

£50.10

CASH

£50.10

15/05/2014 - 12:40:00

43

1000043150514

The sales data for your current filter selection is presented. Filters for the Sales Data include **Department**, **Group** and **Price Level**, as well as filtering to individual **clerks** and/or **terminals**. As with virtually any other data page in TouchOffice Web, you can either enter a Start and End Date and Time, or use the Period Selector shortcuts to quickly select useful pre-defined reporting periods.

Today	Yesterday	This Week	Last Week	This Month	Last Month	This Quarter	Last Quarter
-------	-----------	-----------	-----------	------------	------------	--------------	--------------

You can further filter your results via a **Keyword Filter** at the top of the Sales Data list.

The transaction list may be sorted by any column by clicking on the column header. Click again to sort in reverse.

Clicking the **Sale ID** of any listed transaction will pop up a window with tabs to view the **Sales Receipt** and **Sales Data** for that sales transaction. Click the cross at the top right of the window to close when you have finished reviewing the data.

Till Reports

The X/Z Till reports for your current filter selection is presented.

You can filter to any reporting periods, and filter to individual **clerks** and/or **terminals**.

You can further filter your results via a **Keyword Filter** at the top of the X/Z Till Reports list.

The reports list may be sorted by any column by clicking on the column header. Click again to sort in reverse.

Clicking the Report ID of any listed report will pop up a window with the full details of that Till Report. Click the cross at the top right of the window to close when you have finished reviewing the data.

[Main Page](#) > [TouchOffice Web](#) > Terminals

Terminals Page

Allows you to configure or add Terminals for a given site.

Terminal Settings

Upon selecting a site from the drop down list, you are presented with a current list of terminals for that site. In addition to the editable fields, you can also see timestamps for **Last Update Check** and **Last Data Upload**, as well as whether there are any **Pending Updates**.

Add a New Terminal

To add a new Terminal:

- ensure you have selected the correct site from the drop down list at the top of the page.
- enter the **Terminal Number**, **Terminal Name** and **Terminal IP Address** and click the **Add Terminal** button.

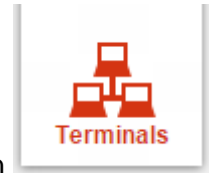
Edit a Terminal

To edit details for an existing Terminal, Click in the field you wish to edit and amend the details. Click the **Save** button at the top of the page.

Delete a Terminal

To delete a terminal, click the **Delete** key at the right hand side of the row for the terminal you wish to delete. You will receive a further prompt asking you to confirm your deletion.

Program data must be collected manually so that TouchOffice Web is aware of the information on the till. If products, descriptions or prices are changed directly on the till, the program data must be collected otherwise descriptions could be blank within TouchOffice Web's product lists and reports.

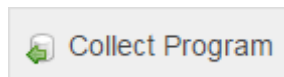


To collect program data go to the "Terminals" section, by pressing the Terminals icon

Most program data can only be collected from the tills if you are using the Head Office, only site specific data such as keyboards can be collected if you are in a specific site. First make sure you using the Head Office in the drop down menu.

0 - Head Office +

Then press the Collect Program icon.



A new prompt will appear to choose the site you want to collect the data from.

Collect from site: Please Select...
Please Select...
1 - Newport

Then it will prompt for the till at that site to collect the program data from.

Collect from site: 1 - Newport Collect from terminal: Please Select...
Please Select...
24 - Chris

Finally choose Submit and you will then see all the files that can be collected from the till. "Collect All Data" or click on individual files to collect just the information you want to retrieve. The files will turn orange when they have been marked to be updated, and then green once that file has completed uploading to the web or red if there were no records to update.

Collect Program				
Collect All Program Data				
PLU File Updating...	Clerk File Complete: 120 records imported.	Departments Complete: 51 records imported.	PLU Groups Updating...	Fixed Totalisers Updating...
Finalise Keys Updating...	Transaction Keys Updating...	Status Keys Updating...	Tax Table Updating...	Fixed Characters Updating...
List PLU File Updating...	Batch XZ File Updating...	Keyboard Updating...	Keyboard2 Updating...	Menu Levels File Updating...
Clerk Detail Updating...	Receipt Message Updating...	Scrolling Message Updating...	Error Message Updating...	Check Text Updating...
KP Category Updating...	KP Message Updating...	Timezone Updating...	Timezone Detail Updating...	Mix & Match 1 Updating...
Mix & Match 2 Updating...	Set Menu Updating...	Reason Table Updating...	Price Level Scheduler Updating...	Product Group Header Updating...
Product Group Items Updating...	System Flags Updating...	Employee Job Updating...	Employee Shift Updating...	Non PLU Table Updating...
Floorplan Tables Updating...	Customer Updating...	Customer Balance Updating...	Customer Group Updating...	Maximum File Sizes Updating...