



Analyst PoS Basics

Analyst PoS – Basic Operation

January 2011
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An extract from the full Analyst manual containing:

- Logging On
- Sales
- Sales Features
- Till Totals
- Purchases
- Icons
- Backups
- Support

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Logging On

To use the till you must be "Logged On". This identifies who is using the till for security reasons. Depending how the system has been configured by the purchaser of your system there are a number of security options available. We shall go through the most secure option here, some may not be relevant to your system.

The security in the system has been designed limit what each person can do within the system. This is to protect not just the managers and owners of the shops but you as well. When logged on, your movements through the system are tracked and sales, orders, price changes and mistakes are logged against your name. This can help provide useful information about who is busiest on the till, who builds the orders, who may need more training due to mistakes and the obvious traceability back to possible theft. The security in the system is there to protect those who use the system properly and responsibly, if you are one of these people you have nothing to worry about.

To Log On

There are two ways to log on.

A Scanbadge may have been issued to you. This is a small plastic badge designed to fit on a key ring with a barcode on it. This badge is unique to you in your shop and should not be lost, damaged or defaced. Take good care of it and keep it in a safe place where no-one else can use it.

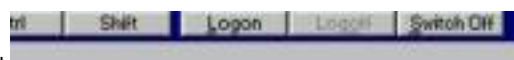
You may also have been issued with a Log On name and password. Again this is unique to you, do not tell anybody your log on name or password.

With a Scanbadge:

Use the scanner to scan the barcode on your badge. The scanner will beep and the screen will change. You are now logged on ready to sell.

With a Logon Name:

Press the Logon button in the top blue bar of the screen. The button may look small, but still works if you press slightly below it.



A keyboard will appear on the screen. Type in the Logon name that has been given to you. This will be no more than 3 characters (letters) long, then press the OK button. Your normal keyboard can be used to type this in. If you are not familiar with the "QWERTY" keyboard press the A-Z button for an easier alternative keyboard layout.



The screen will change ask you for your Logon Password (if you have one). Type in your password. It will appear as asterisks (*) so no-one can see what it is. Your normal keyboard can be used to type this in. Now you are logged on, the screen will change and you are now ready to start selling. to move on.

Windows Vista & Windows 7

The logon buttons in the title bar are not available on these operating systems. There is an additional 'Analyst' option in the title bar on these systems which can be used to logon.

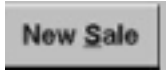


Analyst PoS

Sales

Making a Sale

Now you have logged on you are ready to start selling. If you logged on with a Scanbadge, you may already be in the New Sale Screen. If not press the New Sale button from the Previous Sales Screen.



The New Sale Screen looks like this.

Scan some items in by scanning their barcodes.

During a Sale

As items are scanned into the sale, the description and price of a product appear in the main window of the New Sale screen. You will also see the Amount due value increasing as you scan more items. During a typical sale, the screen will look like this.



At this stage changes can be made to any of the items you have scanned in the sale. Simply touch the item line in the sale you wish to change (so it turns blue) and press the **Action** Button. The picture below is what you will see at the bottom of the screen.



When all of the customers items have been scanned in, look at the Amount Due and ask them for payment. When you receive it press the End Sale button .

Ending a sale

When all of the customer's items have been scanned into the till look at the Amount Due and ask the customer for payment. When you receive it, press the **End Sale** button. Once this has been pressed a Balance line appears in the main window. Nothing can be changed above that Balance line. The screen will look like below.

The screenshot shows a software window titled "New Sale" with a menu bar (File, Edit, Format, Help) and a toolbar (Expand, Quantity, Refund, PriceOver, Nhs, Search, Dev/print, Cash). The main area contains a table with the following data:

Description	Pack Size	Quantity	Price
ANADIN EXTRA TABLETS	12		1.75
COTTONSOFT CTM BUDS	100		0.35
SUNSHINER L&H MD TAN MATTE			3.49
BALANCE			5.59

Below the table are input fields for Stock, Cost price, On-order, Margin, Promo (0.00), VAT (0.83), Amt due (5.59), and Sale items (3). At the bottom, there are buttons for Cash, Cheque, Card, Other, Discount, Void, Layaway, Account, Points, and Cancel. The status bar at the bottom left says "Ready" and the bottom right says "84SUP 11:01".

We will assume that the customer is paying by cash, so we will press the Cash button.

Payment Screen

After the payment method has been pressed (here we have assumed cash payment), the bottom of the screen changes again.

The screenshot shows a software window titled "New Sale". At the top, there are menu options: File, View, Edit, FMS, Function. Below the title bar, there's a status bar: "Ready" and "845UP 12:31".

The main area is a table with the following data:

Description	Pack Size	Quantity	Price
ANADIN EXTRA TABLETS 12			1.75
COTTONSOFT CTTN BUDS 100			0.35
SUNSHIMMER L&N MD TAN MATTE			3.49
BALANCE			5.59

Below the table is a row of buttons: Expand, Quantity, Refund, PriceOver, Nhs, Search, Deviprint, Cash.

Below the buttons are several input fields:

- Stock:
- Cost price:
- Promo:
- Amt due:
- On-order:
- Margin:
- VAT:
- Sale items:

At the bottom, there's a "CASH PAYMENT" section with a numeric keypad (0-9, 00, £5, £10, £20) and an "Amount:" field containing "5.59". There are "OK" and "Cancel" buttons.

The Amount box is automatically filled with the balance of the sale. You can press OK now if the customer has tendered the exact amount, or if you want to work out the change yourself. You can also type the amount in that the customer has tendered and press OK, or use the "Fast Tender Buttons".

By using either of the last two methods, the system will prompt you to give the customer the correct amount of change. Here we will assume the customer has tendered £10.00, so we will press the **£10** fast tender button.


Change Due

Once the £10 Fast Tender Button has been pressed, the cash drawer will fire and the screen may now display the change to be given back to the customer (depending on the setup of your system).

Description	Pack Size	Quantity	Price
ANADIN EXTRA TABLETS 12			1.75
COTTONSOFT CTTN BUDS 100			0.35
SUNSHIMMER L&H MD TAN MATTE			3.49
		BALANCE	5.59
		CASH	10.00
		CHANGE	4.41

Expand Quantity Refund PriceOver Nhs Search Dev/print Cash

Stock: Cost price: Promo: Amt due:
On-order: Margin: VAT: Sale items:

 Change Due: 4.41

Ready 09:50P 12/20

Press OK to return to the Previous Sales screen, ready for the next customer.

Sales Features

Not all sales are simply scanning the items and taking payment for them. In this section we will look at some of the other features we can use to sell the items, and how to rectify mistakes.

The following topics are included in this section.

- Selling quantities of an item
- Clearing lines from a sale
- Discounting a line in a sale
- Changing the price of an item
- Entering the stock level of an item
- Placing the item on an order
- Recording lost sales
- Recording waste
- Refunding an item
- Code Not Recognised
- Pseudoephedrine Sale Warning Messages
- Product Search
- Department Sales
- QuickPick
- Expanding an item
- Voiding a whole sale
- Discounting a whole sale
- Layaways
- Account sales
- Cashback

Selling Quantities of an Item

A customer may require several of a particular item, e.g. Chewing gum. If they would like 5 packs of the same gum, it can take some time to scan all 5 packs of gum, so we have a quicker way to do it.

Note: All packs must be identical. If there are different types of packs the Quantity function should not be used.

Whilst in a sale scan one of the items and confirm that the correct description and price appear in the main window.



With the gum highlighted in blue, press **Action** then **Quantity**, or if you have a Speed Sale button for **Quantity**, press that. The bottom of the screen will change to:



Press **5** and **OK**. You will now notice that in the main window the Gum line now reads:



As you can see, 5 has been entered as the Quantity and the price has been multiplied for you.

Clearing Lines from a Sale

As you learn to use your new EPOS system you will make plenty of mistakes. This is quite normal and often the best way of learning what not to do. Even experts on the system make mistakes during busy and stressful periods, but don't worry they are usually very easy to sort out.

The most common mistake of all is scanning the wrong item or number of items into a sale, or customers changing their mind. Thankfully it is the easiest to resolve.

When you realise you have made the mistake, stop scanning and highlight the wrong item in the sale by touching it on the screen. You may not need to if it was the last item you scanned, as that line is automatically highlighted in blue.

Description	Pack Size	Quantity	Price
WRIGLEYS GUM EX/SUGARFRE 10		(5)	1.30
NHS SCRIPS			6.00
ANDREX TOIL TISS WHITE			1.29
COLGATE COOL STRIPE 100ML			1.71

In this example, we will imagine that the customer doesn't want the toilet rolls any more. We have stopped scanning and highlighted the Andrex rolls in the sale already. Now press the **Action** and **Clear** buttons. The bottom of the screen will change and confirm that you would like to clear this from the sale.



Press **Yes** and the line disappears from the sale. The Amount Due is re-calculated and you can carry on scanning or end the sale as required.

Discounting a Line in a Sale

To apply a discount to a particular line in a sale, first, highlight it so it turns blue. In this example I would like to discount a bottle of Cyder Vinegar by 25%. I have already highlighted it in the sale.

Description	Pack Size	Quantity	Price
DEV & PRINTING			2.99
ORAL-B DENTAL RINSE 300ML			2.29
APPLEFORDS CYDER VINEGAR			1.21

Now press **Action** and **Discount**. The bottom of the screen will change to:



The four methods of discount are across the top (Percentage, Value, Tax and Free). Along the bottom are some of the most common discount percentages to speed things up. We simply need to press the **25%** button. An extra line appears in the main area of the sales screen to show this.

Description	Pack Size	Quantity	Price
DEV & PRINTING			2.99
ORAL-B DENTAL RINSE 300ML			2.29
APPLEFORDS CYDER VINEGAR			1.21
DISCOUNT (25.00%)			-0.30

This is deducted from the Amount Due and appears on the customer's receipt. Carry on scanning or end the sale.

If another type of discount was required simply press the type. If a different rate of percentage or a value discount was required, simply press the button and type in the amount of discount required, then **OK**.



Changing the Price of an Item

If an item scans at the wrong price during a sale, it can be changed.

Highlight the item in the sale. In this example, a packet of soap that costs £1.45 has scanned at £1.69.

Description	Pack Size	Quantity	Price
BRAUN REFILL EB17-2			5.34
SHIELD TOILET SOAP 125G			1.69

Press **Action** then **PriceOver**. The bottom of the screen will change to:



Type in the price the soap should be and press **OK**. The new price appears in the sale and the Amount Due has changed.

Description	Pack Size	Quantity	Price
BRAUN REFILL EB17-2			5.34
SHIELD TOILET SOAP 125G			1.45

The system will remember the new price and will keep it at £1.45 until next changed. Unless the 'Transient PriceOver' option is selected in the Sales section of the Options Tab in the PoS System Configuration.

In the same section of the system configuration there is an option to set the retail price source to 'User Maintained' following a price over. This removes the confusion of where a price might have come from and prevents any further database or supplier updates reverting the product to the original price.

Automatic PriceOvers

Not all items added to the Analyst database contain a retail price. If an item is selected for the first time and does not contain a retail price the PriceOver option will automatically display. In this instance the **OK** button will be greyed out as a price must be entered.

The **Cancel** button remains available, but if selected an warning will appear that the line will be removed from the sale.

It is possible to sell items at zero price (for free) by setting the retail price source on the Details Tab of the Product Editor to 'Allow Zero'. But this must be done in advance.

Entering the Stock of an Item

For Analyst to be able to order accurately, the system needs to know how much stock of each item you have. There are many different ways to enter this into the system, but if want to do the odd item during a sale, after scanning the product, press **Action**, then **Stock**.

The bottom of the screen will change and prompt you to type in the amount you have in the shop (both on the shelves and the stock room) not counting the one you have just scanned.

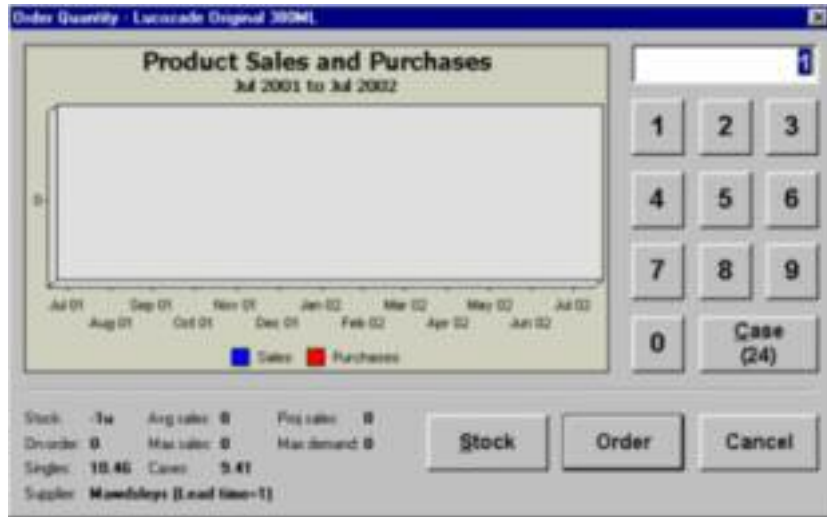
SUNSHIMMER L&N MD TAN MATTE					Stock:	OK
1	2	3	4	5	2	OK Cancel
6	7	8	9	0		

Type in the amount of stock you have and press OK.

Placing an Item On Order

During a sale, Items can be placed on order. There are quicker and easier ways to do this, but if you choose to control the orders more directly you can create one as you go along.

After scanning the item, press the **Action** button and then **Order**. The screen will change to the order amount window.



Although initially confusing, this screen provides you with the information you need to decide how many you would like to order. The graph displays the Sales (in blue) and Purchases (in red) for the last 13 months. Underneath there is other information including Stock Level and Average Daily Sales.

When you have decided how much you would like, use the number pad and then press the **Order** button.

Recording Lost Sales

If you are asked by a customer for an item that you either don't stock, or you have run out of, you have lost that sale and they will go elsewhere. If you make a log of this using the **Lost Sale** function, the system will order some more of this item so the next customer who wants some won't be disappointed.

To log a Lost Sale do the following. In a New Sale, search for the item as though you are selling it, or scan it if you have some left. Press the **Action** button then **Lost Sale**. The bottom of the screen will change like below.

The screenshot shows a software interface window titled 'UNICHEM PARACETAMOL 32'. It features a numeric keypad with buttons for digits 1-9 and 0. To the right of the keypad is a text input field labeled 'Lost sales:' containing the number '0'. Below the keypad and input field are two buttons: 'OK' and 'Cancel'.

Type in the amount of items you could have sold and press OK. You will now have to clear the line from the sale as described earlier in this section.

Recording Waste

As the system needs to keep track of the stock levels in the shop any damaged or out-of-date stock that will be thrown away or returned to a supplier needs to be recorded. Again this is done as part of a sale.

In a New Sale, scan or search for the item and press **Action** and then **Waste**. The bottom of the screen will change as below:

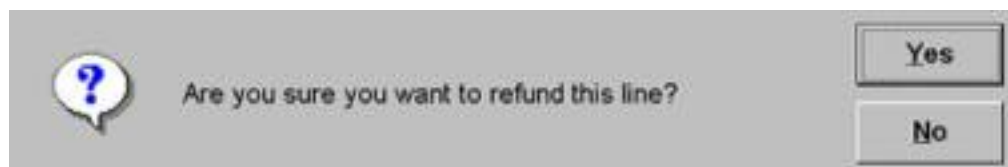


Type in the number of items that are being returned or damaged and press OK. You will need to clear the line from the sale as described earlier in this section.


Refunding an Item

Refunds are very straightforward to do and can be done on their own or as part of a sale with other items which are being purchased or exchanged.

In a New Sale scan the product that is being returned, or search for it using the description. With the product highlighted in blue in the main area of the New Sale window press the **Action** and then the **Refund** button. The screen will change at the bottom to confirm that you do want to refund this line.



When you press **Yes**, the screen changes again to ask whether you will be re-selling the item. This depends on why the product was returned, any damage and your shop policy.



This simply means "Are you putting back on the shelf?". When you have chosen the appropriate answer, you return to the New Sale screen and the line now appears with a negative price.



Description	Pack Size	Quantity	Price
ANADIN EXTRA TABLETS 12			-1.75

The sale can now be ended as normal, or other products can be scanned in.

Code Not Recognised



This screen will appear when you scan a barcode that is not in the system. You need to make the decision whether this item should be in the system or not.

If you think it should be, press the **Search** button. [Click here to learn how to search for products.](#)

If the product is obscure, or a one-off press the **Dept** button. [Click here to learn how to use department sales](#)

Pseudoephedrine Sale Warning Messages

In August 2007 the Medicines and Healthcare Products Regulatory Agency (MHRA) made an announcement to tighten controls on the sale of items containing pseudoephedrine and ephedrine. Only one pack of any item containing pseudoephedrine is permitted in any single transaction.

Analyst terminals running version 3.38 and later will warn users when they sell any item containing pseudoephedrine to ensure they know the regulations.



The warning appears when the item is scanned in the sale. The user must acknowledge the warning by clicking **OK** before continuing with the sale.

If subsequent products are added to the sale which also contain pseudoephedrine the warning will reappear listing the items containing pseudoephedrine.



The warning must again be acknowledged and after consultation with the patient, one or more of the packs must be removed from the sale to conform to the new regulations.

Updates

The list of products containing pseudoephedrine or ephedrine is relatively small and is unlikely to change greatly over time, but any update there may be will be maintained by the weekly Drug File Update (DFU) issued by Positive Solutions. Users still receiving the weekly Incremental Secondary Updates (ISU) will not have this list maintained once established during the patch to Analyst version 3.38, though due to the stability of the market for these items it is not expected that one will be required.

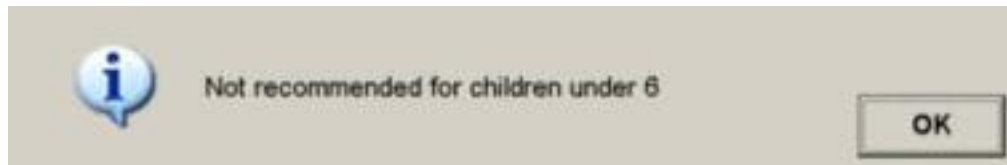
To determine which type of update your version of Analyst uses click on 'Help' and 'About Analyst' from the file menu at the top of the screen. Underneath 'Written by Chris Wilcock' a line of information is displayed. A DFU or ISU entry will reveal which mechanism is currently used.

If you remain concerned and wish to change your system from ISU to DFU updates, call the CareDesk on 01257 235940.

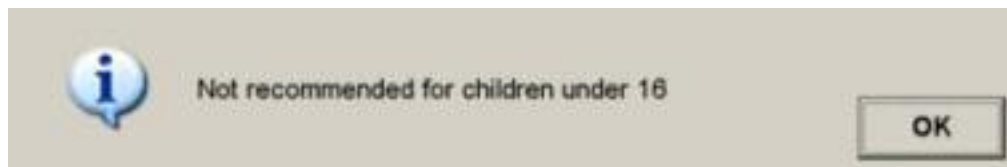
OTC Product Messages

Analyst can flash a warning at the bottom of the sales screen for certain products displayed below. This functionality is configured by the CareDesk, so if you'd like this enabled on your system call 01257 235940.

Under 6 Cough Mixtures



Bonjela



Clopidogrel

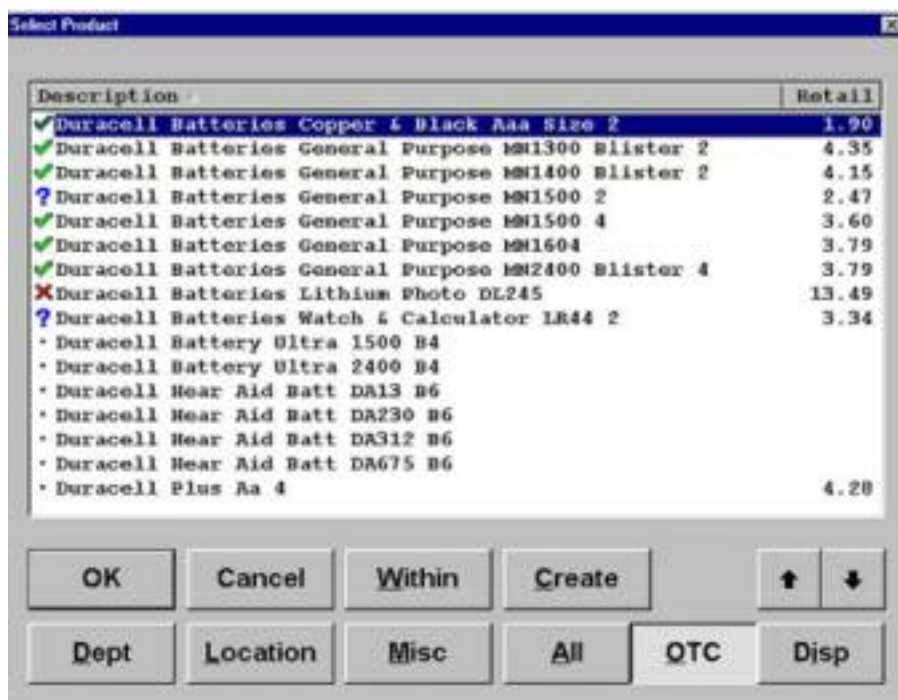


Product Search

If you cannot scan the barcode of an item, but you think that it should be in the system, choose the press the **Uncoded** and then the **Search** buttons. The screen will now display the search box as below.



Type in as much or as little of the description of the item as you like. The less you type in, the more items it will find, but if you make the search too specific, it may not find anything. When you have typed the description in, press OK. The screen will change when it has found the items that match. I have typed in " Duracell" in the following example. It will find all products that start with that text.



From this list select the item you want and press OK. If it is not in the list either press **Cancel** to start the search again, or **Within** which will look for what you typed, anywhere in the description and not just the beginning.

A similar screen will appear with those results. Select the item and press OK. The item will appear in the sale as though you scanned it.

Department Sales

If you cannot find the item in the system or you do not want to add an item to the system, you can use the Department Sales function. Departments are a way to group similar items together, eg Haircare.

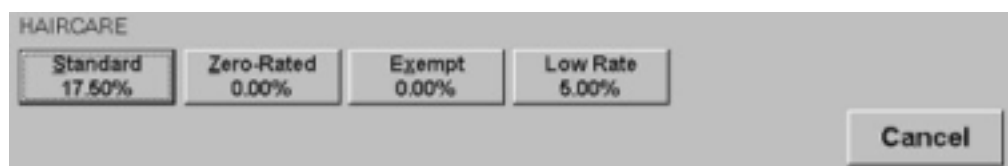
We can use the departments to register a sale and identify what type of product it was. Press the **Uncoded** and then the **Dept** buttons, or just the **Dept** button, depending on what screen you come from.



The screen lists the departments that are setup in the system. Select the most appropriate one and press OK. The bottom of the screen will change as below.



Type in the price of the item and press OK. Depending on how your system is setup, the bottom of the screen may change again to ask what VAT rating to use for this item.



Press the appropriate button for the VAT rating. The sales screen will then return with this line in.

QuickPick Sales

Products can also be sold from menu selection. This is not intended for general use across the whole shop, but certain lines may not have barcodes but still be setup as 'real' products within Analyst. These can be sold by using a PLU (a user defined short selling code) or by assigning them into a specific group designed for use with the QuickPick option.

Product Group Setup

To allow ranges of products to be sold through a QuickPick button they first need to be assigned to a specific group. This can be a department (though PSL usually maintain these), a Product Group or a User Class. Assign the products to the selected group ensuring that the same product group is used. The use of User Classes are recommended for this if starting from scratch.



QuickPick Button Setup

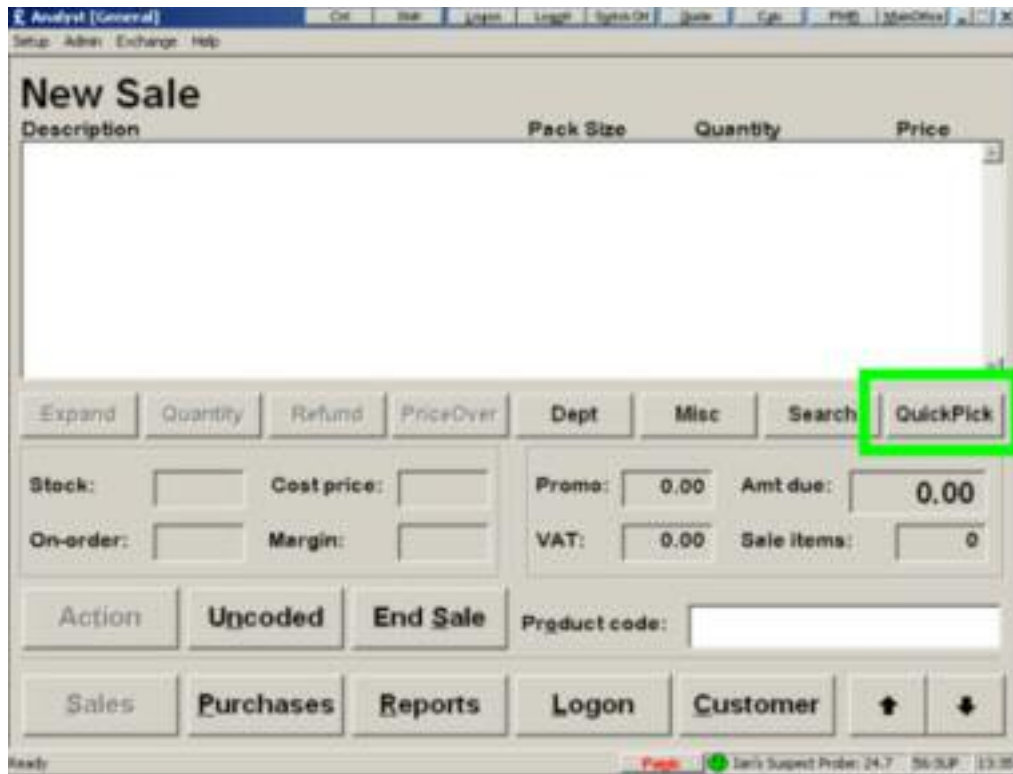
From the 'Setup' menu at the top left select the 'Uncoded Sales' option. Add a new button and choose the QuickPick group you have used.



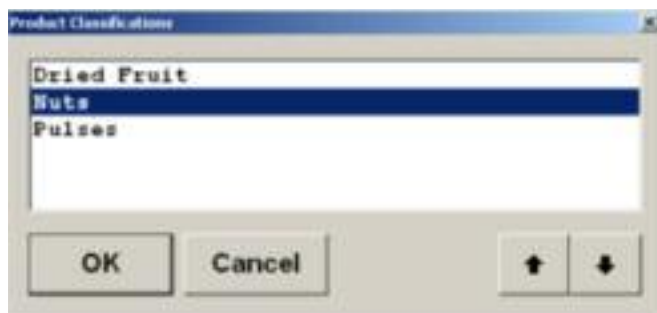
Add a button text and save the item by clicking **OK**. This button will now be available under the Uncoded button of a sale and can be promoted to a SpeedSale button if required.

Selling Using QuickPick Buttons

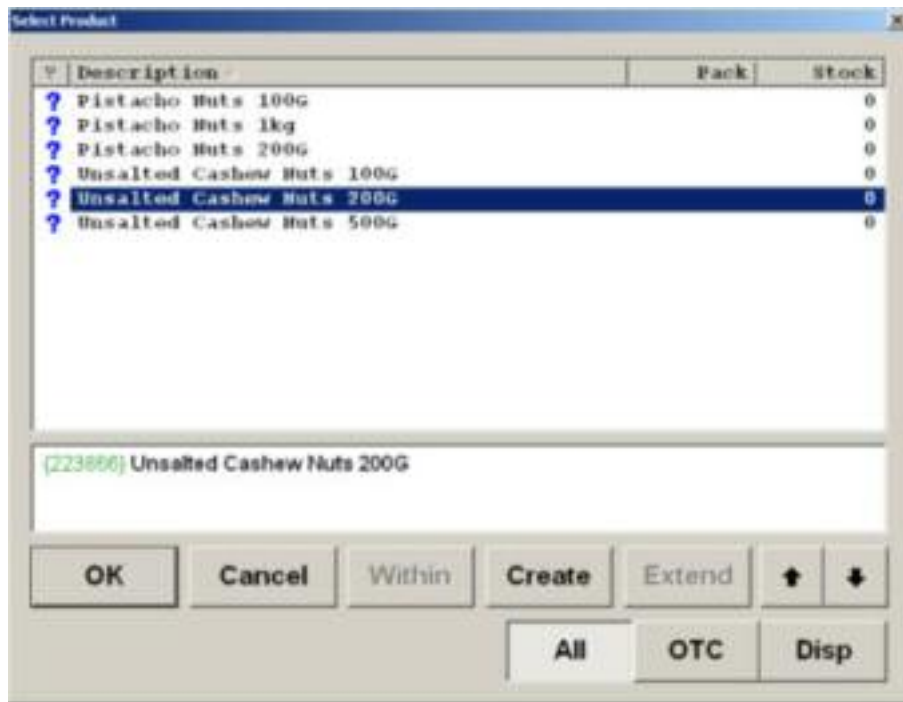
Once setup the button will be available under the **Uncoded** button or can be setup on a SpeedSale button.



Click the QuickPick button.



Select the group you think the product might be in and click **OK**.



All of the products are now assigned to that group. Highlight the desired product and click **OK** to add the product to the sale.











No Sale

The **No Sale** button on the Previous Sales screen is used primarily to open the cash drawer without the need to perform a sale. Rather than simply opening the drawer however, the system provides a list of reasons why the drawer has been opened and the opportunity to enter the amount of money involved.



These options are denoted by the blue arrow and are for buying coffee, milk, paying the window cleaner etc and other routine expenses involved with running a shop. These be added to, removed or edited in the [No Sale Reasons](#) section of the system setup. Press the **No Sale** button, select the option which is appropriate, press **OK** and complete the amount of money removed from the drawer.

Other options vital to a PoS system are contained in the No Sale list. These are:

	Account Pay-Out	Provide a payment to a customer from their account
	Account Payment	Credit a payment from a customer to their account
	Automated Label Configuration	Configures the label layout for Automated label printing
	Automated Label Reprint	Reprints the last Automated label batch in case of printing error
	Banking	Remove cash from the drawer but include the value in the Till Totals
	Overnight Drawer Removal	Opens the drawer for removal and disables 'open' sensors
	Create New Reason	Edit the No Sale Reasons
	Drug Interaction Check	Check for a drug interaction before selling (Analyst IPS Only)
	Product Lookup	Check product details
	Till Totals	Perform Till Totals

Account Pay-Outs/Payments

Using these options money can be transferred into (payment) and out of (pay-out) a customer's account.

Banking

This option allows money to be removed from the cash drawer to the safe of wherever without causing complete confusion at the end of the day when its time to cash up.



When selected from the No Sale list press **OK** and enter the amount of money removed from the drawer by pressing the appropriate button and typing in the amount removed. Multi-currency systems have a set of buttons for each currency setup on the system and can be toggled by pressing the currency name button. When complete press **OK**. An entry is placed on the Previous Sales screen.

The values entered, or the sum of values entered through the day if more than one banking is performed are included on the Till Totals at the end of the day and the values are removed from the Payments section which are effectively the 'in-drawer' totals.

Overnight Cash Drawer Removal

Analyst can warn if the cash drawer has been left open for a period of time and may trigger alarms through [Event Monitor](#). Many shop though leave the empty drawer open overnight to deter thieves. Once cashed up use the Overnight Cash Drawer Removal to open the drawer and disable the 'open' sensors which may trigger an overnight alarm.

Drug Interaction Check

This Analyst IPS feature allows any number of drugs or products to be entered to check for any [interactions](#) between them and optionally a specified patient without performing a sale where the checks would be performed anyway.

Select the option from the No Sale list and press **OK**. Search for the patient as usual or press **cancel** if not required. Now enter the first drug by either searching for it or scanning the barcode. The search box will re-appear for you to enter the second drug. Either an interaction will display or a message confirming that the system has not detected an interaction.



Interaction Alert



No Interactions found

NOTE: Even though the system has not detected any interactions any doubt should be referred to a pharmacist whose decision is final.

Product Lookup

Although the product details are displayed in the [Product Editor](#) when an item is scanned on the Previous Sales screen the basic information is contained amongst other fields and some people find it confusing. Also your [assistant setup](#) may not allow you to access the Product Editor.



Details are listed on the left and a graph of the last 13 month's sales is on the right. Click on **Edit** to open the Product Editor, **Search** to lookup another item or **Close**.

Expanding an Item

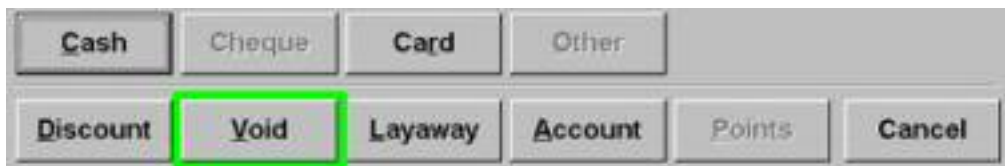
Expand is common button throughout Analyst. When you click on it, the screen will change to display more detail about whatever is highlighted on your screen at the minute. In the sales screen, highlight whatever you would like to see more details of, and press **Action** then **Expand**.



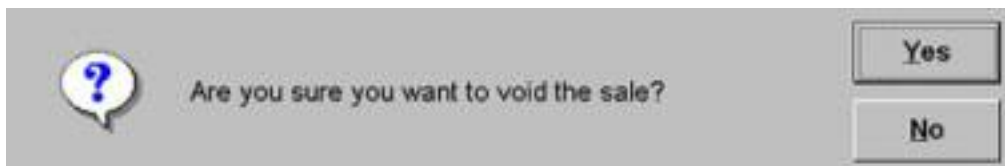
Voiding a Sale

Sometimes you may need to completely void a sale because a customer has forgotten their money or you have made some mistakes. If you have made a few mistakes it is often quicker and easier to void the sale and start again.

To do so, Press the **End Sale** button and then Void.



The screen changes and confirms that you would like to void the sale.



When you press **Yes**, you will return to the Previous Sales screen. You will see that the sale you have just voided will have a red cross next to it and the word "VOID" in the Tendered and Change columns.

17:20	1	41485	1	1.80	1.80	0.00	All Staff
X 12:10	64	41624	1	-1.75	VOID	VOID	Supervisor

You should only use the void function when you have to. Don't see it as an easy way out of the sale. The number of voids you do is logged and appears on the till reports and Assistant Performance graphs.

Discounting a Whole Sale

If a customer is eligible for discount on everything that they buy, staff discount or similar, rather than discount each line individually as seen earlier, the sale can be discounted as a whole.

To do so, when all the items have been scanned in, press **End Sale** and then **Discount**. The screen will change at the bottom to ask how much discount to apply.

SALE DISCOUNT

Percent	Value					Cancel
5%	10%	20%	25%	30%	50%	

You can quickly apply one of the preset percentages by using the buttons on the bottom of the screen, or choose either **Percentage** or **Value** to input your own discount. The discount you apply appears under the Balance line. The new amount payable can be seen on the Amt Due box on the screen.

E Analyst Ctrl Shift Logon Logout Search PMP Main Menu

Setup Admin Exchange Bill

New Sale

Description	Pack Size	Quantity	Price
ANADIN EXTRA TABLETS 12			1.75
COTTONSOFT CTTN BUDS 100			0.35
UNICHEM PARACETAMOL 32			0.69
		BALANCE	2.79
		DISCOUNT (10.00%)	-0.29

Expand Quantity Refund Price Over Nhs Search Dev/print Cash

Stock: Cost price: Promo: Amt due:

On-order: Margin: VAT: Sale items:

Action **Uncoded** **End Sale** Product code:

Sales Purchases Reports Logon Customer ↑ ↓

Ready 04:50P 14.26

Layaways

At the end of a sale, if the customer needs more time to find more items, or is coming back later to pay the bill, the sale can be laid away. This temporarily suspends the sale until they return, so you can continue dealing with other customers.

To do this, scan all the items that you can into the till and put them to one side. Now press **End Sale** then **Layaway**.



You will return to the Previous Sales screen and you will see the sale you have suspended appears with a filing cabinet icon next to it with the word "Layaway" in the Change and Tendered column.



Time	Item	Price	Qty	Total	Change	Tendered	Operator
10:40	53	41643	1	1.57	1.57	0.00	Supervisor
14:05	84	41646	2	2.10	LAYAWAY	LAYAWAY	Supervisor

To resume this sale, on the Previous Sales screen, highlight the Layaway sale in blue by touching it and press the **Expand** button. The sale will then re-appear and you can continue to scan the extra products in or end the sale to accept payment.

Account Sales

Customer accounts can be setup in the system to allow trusted customers to run up a bill and to pay off periodically. Refer to the main manual to learn how to set the account up.

To use these accounts, start a new sale as normal and scan all the items into the system. When complete, press **End Sale** then **Account**.



You will be prompted by the search screen for the customer account you wish to use.



Type in the surname first, then forename, eg Red G, and then press OK. In this example I have just typed in the surname "Red".



Select the account you wish to use and press OK. The sale will end and return you to the Previous Sales screen.

Cashback Facility

To enable this feature, log on as Supervisor then press on **Admin, System Configuration**. On the **Sales** tab, check the box marked 'Enable Cashback' and enter the minimum spend and maximum Cashback as appropriate.



During a sale, if the customer requests Cashback, press the **End Sale** button, then **Cashback** before entering any amounts tendered.

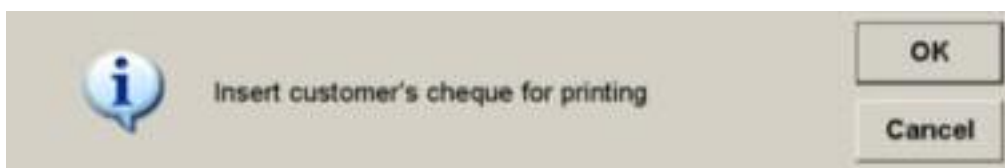


Enter the amount they have requested and press **OK**, The payment screen now reappears for you to accept the card payment of the total amount including the Cashback. When finalised the cash drawer will open and the screen will prompt to give the Cashback due.

Cheque Printing

If your system is equipped with a slip printer you will be able to print cheques out for you customers rather than waiting for them to write them out.

When the cheque printing option has been enabled in the Sales Tab of the System Configuration, Analyst will prompt you to insert the cheque into the printer. This should be a blank cheque from the customers cheque book.



The payee, date and amount will then be printed ready for the customer to check and sign.

If the option to print on the reverse of the cheque is selected you will be prompted to re-insert the cheque after turning it over. This option is usually used in conjunction with the "Record credit card details" option on the Options Tab.

Sales Alerts

For the added security of the staff and owner of the business, potentially suspicious sales are highlighted on the previous sales screen.

Time	Till	Ref	Lines	Value	Tendered	Change	Assistant
09:17	99	10	1	6.40	6.40	0.00	Supervisor
09:17	99	11	2	12.80	12.80	0.00	Supervisor
09:17	99	12	1	5.99	5.99	0.00	Supervisor
09:18	99	14	1	-1.69	-1.69	0.00	Supervisor
09:18	99	16	2	5.44	5.44	0.00	Supervisor

The events that trigger a 'sale alert' are contained and selected in the [Options Tab](#) of the System Configuration. These are:

- A sale which has been previously laid-away.
- The quantity button has been used.
- An item has been refunded.
- An item has been discounted
- An item has been subject to a price-over.
- A barcode has been corrected.
- A line has been cleared from a sale.
- A whole sale has been discounted.
- Cashback has been given.

The extra column on the Previous Sales screen which displays an exclamation mark if a sale alert is triggered only appear if there is an alert to display.

Interactions

Your Analyst system will report interactions between items which are being sold to a customer.

During the normal course of a sale Analyst checks if there are any active ingredients which might interact with any other items sold in the same sale. If so an interaction warning box will appear.



The top half of the window lists the interactions which have been triggered in the sale; there may be more than one. It displays the what the interaction is and between which two factors, or items, scanned. The bottom half displays more detail about the interaction which is highlighted in the top half.

More information can be displayed by clicking on the **Factor 1** or **factor 2** buttons. This will open the product editor of the corresponding items. The **EMC 1** and **EMC 2** buttons will be available if any items have documentation lodged with the Electronic Medicines Compendium. Extra Patient Information Leaflets can be printed off from there. If there is no pharmacist available to refer this interaction to, it can be printed on the receipt roll and handed to them later to check. Click the **Close** button to remove this warning from view. The sale can now be amended or completed as required.

The interactions can be recalled during the sale or when reviewing the sale afterwards by pressing CTRL+I on the keyboard. The same interaction screen appears with the same functions available as there initially was.

Customer Identification

If you identify the customer during the sale Analyst will look back over the last 90 days and check if any items sold to them today will interact with anything sold to them over the last 90 days.

When reviewing a sale with interactions for a customer who has been identified use CTRL+I for interactions in this sale alone or CTRL+SHIFT+I for the last 90 days' worth of interactions for the customer.

Till Totals

How to Cash Up

Analyst, like all EPoS systems and Cash Registers will provide a read out at the end of the day indicating what should be in the cash drawer. In Analyst these are called **Till Totals**.

There are two types of reads that the system can give you. A **Check** will give you a read out without clearing the figures. This is also known as an X read.

A **Lift** will give the same readout as a check, but clears the figures ready for a new trading period.

To start cashing up, sign on and press **No Sale**.



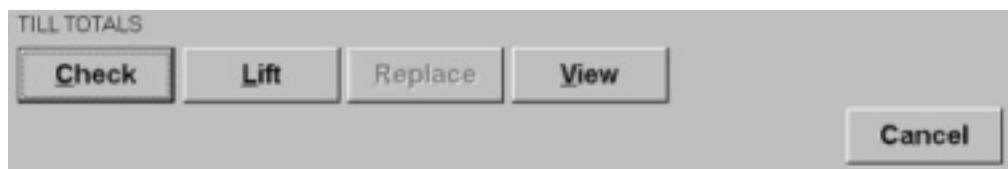
The screen will change and display the No Sale Reasons.



Highlight **Till Totals** by pressing it and press OK



The bottom of the screen will change for you to choose which read you would like. Some of the options may not be available, depending on what you are allowed to do.



If you need to declare how much money you have in the cash drawer, you will need to refer to the Cash Declaration page to continue. If not, continue to view the Check Read and Lift Read topics.

Check Read

A Check read shows how much should be in the cash drawer without clearing the figures. When the readout appears you will see that the words "Not cleared" appear after the reading number.

Totals: Mon 10/09/01 Till 84
Reading: 66 (Not cleared)
Assistant: supervisor
Time: 10:15

Summary	Account	Drawer	Total
TRANSACTIONS	0	4	4
VOIDS	0	0	0
COST VALUE	0.00	2.00	2.00
SALES	0.00	207.05	207.05
A/C PAYMENTS	0.00	0.00	0.00
DISCOUNTS	0.00	-5.00	-5.00
REFUNDS	0.00	-1.69	-1.69
PAY-OUTS	0.00	0.00	0.00
CASH-BACK	0.00	0.00	0.00
BANKINGS	0.00	0.00	0.00

Buttons: Expand, Receipt, Print, Anchor, Find..., Quit, Sales, Purchases, Reports, ↑, ↓

Status: Ready IN SUP 10:15

To print these out on your receipt printer, press the **Receipt** button. The **Print** button will only work if you have an A4 printer.

Lift Read

A **Lift** will provide the same report as a Check, but will clear the figures afterwards ready for a new trading period. At the bottom of the readout the words "Totals Cleared" will appear to confirm that they have been zeroed.



To print these out on your receipt printer, press the **Receipt** button. The **Print** button will only work if you have an A4 printer.

Understanding the Totals

Both the Check and Lift reads look more or less the same and are broken down into sections. Each of these sections aims to highlight various aspects of the systems performance and usage. Some of the options described here may not appear on your system. Some of the options can be turned on or off in the System Configuration in the Till Totals section of the Options tab and the Pre-Declaration section will only appear if the option is enabled in the Assistant Profile.

The figures displayed on a Check or Lift read reflects the activity on a till since the last Lift read was performed. For this reason the cash drawer insert and float should be replaced at exactly the same time as the Lift reads otherwise the figures will never match.

All of the figures on the read relate only to this till and in the trading period between this lift and the last. On custom totals it relates to the period specified but only on this till.

Header

At the top of the read after your normal receipt header is printed is the header for the read. This displays the date, time, sequential read number (if a lift), till number and assistant who performed the read. These details relate to the details at the time of the read. Subsequent printouts will not change this information. Each Lift read is assigned a sequential number and increases by one with each read. Missing reads can account for foul play amongst staff so be vigilant.

Summary

This section provides an overview of the trading period and is broken down into various aspects down the left column. The 'account column' lists the value of transactions lodged against a customer account. The 'drawer' column lists the value of transactions which have adjusted the in-drawer figure. The 'total' column is the sum of the account and drawer columns.

These are:

Transactions	The number of sales performed.
Voids	The number of voided sales performed.
Cost Value	The cost value of sold items. This will only show the value of those items which were scanned through the system and have a cost price attached. If many items are put through uncoded buttons, do not have a cost price or have an inaccurate cost price this figure will be wrong.
Sales	The value of items sold.
A/C Payments	The amount of money account holders have paid off their accounts. This will be shown as a negative in the Account column and as positive in the Drawer column.
Discounts	The value of item discounts, sales discounts and account discounts.
Refunds	The value of any refunds.
Pay-outs	The value of any pay-outs through the No-Sale section. These are detailed further down the read.
Cash-back	The value of any cashback given.
Bankings	The value of any bankings.

The total of this section is fairly meaningless and can be disregarded.

Payments

This section displays the amount of money that should be held in the drawer at the time of the lift. It is broken down into cash, cheque, credit card and any other payment types you have setup. If a payment type is not listed, it was not used in this trading period and no value is held for it.

The totals in this section should match the amounts which were Pre-Declared or have been counted in the cash drawer. Any discrepancies between the figures mean errors handing cash (long or short changing customers), errors using the till (by not recording sales or pay-outs correctly), by not changing the cash drawer at the same time as performing the lifts or by theft.

Pre-Declaration

This section details the amount of money held in the drawer when the lift was performed. Read the Cash Declaration section to learn about this feature. The amounts displayed here are the amounts typed in by the user named in the header. The discrepancy between the counted amounts and the expected amounts are displayed on the column on the right.

VAT Analysis

This section provides a breakdown of VAT for the sales on this till. In the case of accounts VAT is calculated at the time of sale not at the time of payment. This is because the payments do not necessarily relate to specific sales so to calculate the VAT for account payments is impossible. It is calculated using the VAT status of the scanned items, the status set against the uncoded buttons or the status buttons which were pressed by users when it had not been pre-determined by either of the first two methods. Assuming these to be correct, the figure in the VAT column can be used to help with your VAT returns.

Uncoded Sales

This section details the value of sales through the uncoded buttons. The name in the brackets indicate which button was used to enter the amount whilst the names below without the brackets show which department the value was entered into. These can be the same but are usually slightly different. The total of the bracketed entries will equal those without brackets and is displayed at the bottom of the section. Ideally this value should be reduced to nil so as many items are scanned and identified through the system as possible.

Department Totals

This provides a departmental breakdown of the sales on this till in this period. The columns display the department name, the value of scanned products, the value of sales to that through uncoded buttons and the total of both of those to each department. If you see entries of <none> or <unspecified> then items are not setup correctly. This can lead to errors in other totals such as the VAT Analysis.

Miscellaneous Pay-Outs

These are pay-outs from the cash drawer through the No-Sale button. The total value of the pay-outs for each method and the number of times it was used is displayed. Ideally the 'Open Drawer' method is always displayed without a value as none is logged. Use of this method should be kept to a minimum and the use of an alternative pay-out method setup and encouraged.

Customer Account Transactions

This section displays the activity of any customer accounts. The value of sales on account, account payments and account pay-outs are displayed against each account with activity in this period. Cash sales with the customer merely identified are not displayed here as their account remains unchanged in that instance. The value of sales will be after any account discounts have been applied.

Assistant Activity

In this section each of the assistants who used this till in the trading period are listed here. The number of Sales, Voids, Layaways, Price-overs and clears and listed next to their logon names. Supervisors who logon to authorise activities on the till have the activity logged

against their name rather than the assistant who requested it. By keeping an eye on these you can identify poor users of the system. They can then be given more training, or less access to such features.

Assistant Cash Totals

Similar to the Assistant Activity section above but this section lists the assistants and the value of sales, refunds, discounts and pay-outs.

Totals Cleared?

At the very bottom of Lift readouts 'Totals Cleared' appears indicating that after this read was done (on the day, time and till number in the header) all of the totals were cleared. Check readouts do not show this as totals are not cleared following Checks.

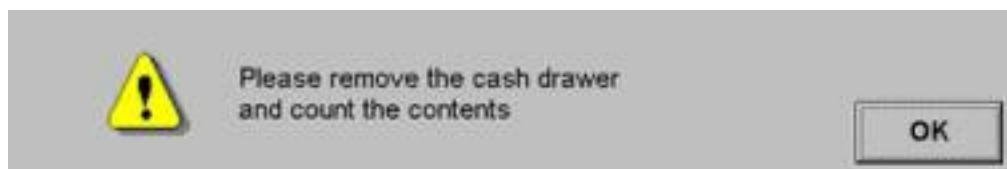
Cash Declaration

You may be required to declare how much you have in the cash drawer before the system will tell you how much should be in then drawer. This provides added security and prevents the till figures from being "fudged". **Cash Declaration** is a two stage procedure.

Stage 1

When you have highlighted the Till Totals option in the No Sale screen, the only option available to you is **Lift**.

When you press this the system will open the cash drawer and prompt you to remove the insert and count the cash.

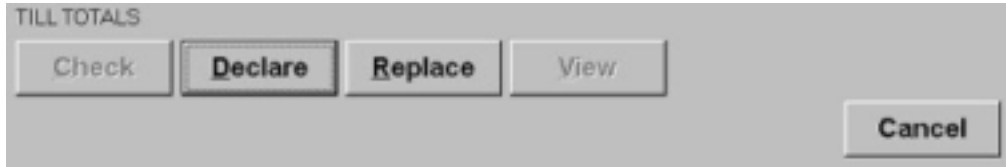


Remove the takings and replace with a new float. The figures have been stored in the system and a new trading period has now begun. Take the money somewhere safe and count the takings. Write down how much you have counted in Cash, Cheques, Credit Card slips and other payment methods such as Coupons and Vouchers (if you have them setup on your system).

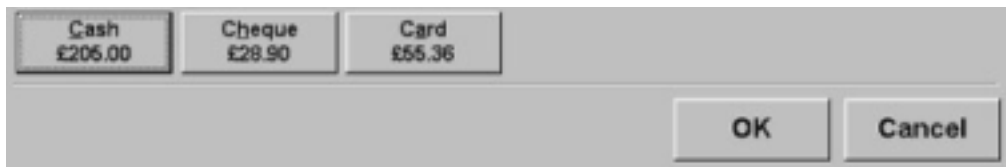
When you have the totals written down, return to the till.

Stage 2

Repeat Stage 1 by pressing **No Sale**, select **Till Totals** and press OK. The screen is now different to before.

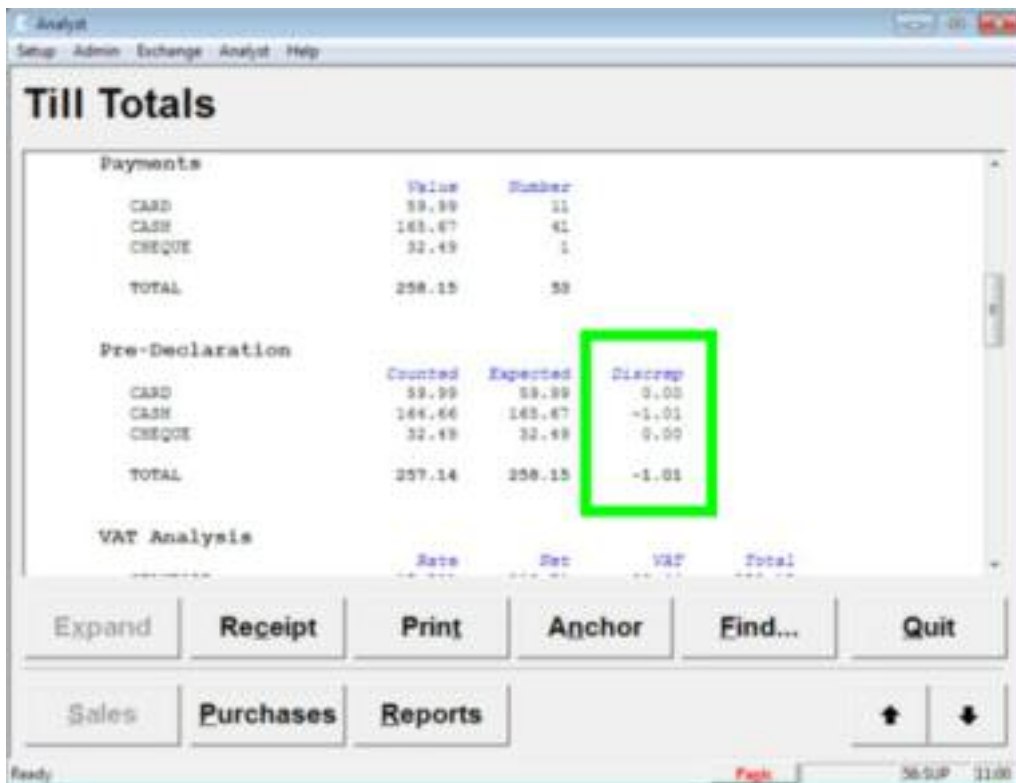


Press the **Declare** button to tell the system how much you have counted.



Press each button and type in how much you have counted. Only when you are sure that you have entered the correct amount should you press OK. You cannot re-enter these figures once OK is pressed.

The screen will now display the figures and a section headed "Pre-Declaration" will be in the read.



The columns of the counted values of money, the expected values and the discrepancy between the two are displayed in the column. If the discrepancy is positive then extra money was in the drawer and the fill was up. If the discrepancy is negative then there was less money in the drawer than expected so the till was down or short.

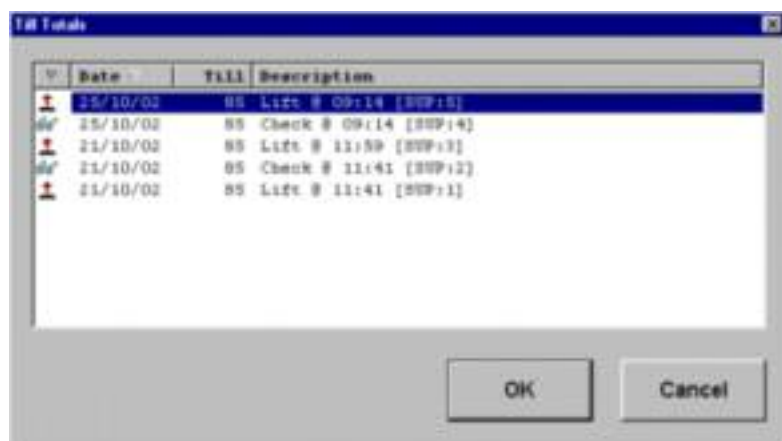
Keep an eye on the total discrepancy as well as each line. It is quite common for an assistant to take a card payment and record it as cash, for example. This would have the affect of recording the cash as up and the card as down, both by the same amount, but the total discrepancy at the bottom will remain zero (assuming no other mistakes were made).

Press **Receipt** for a printout on your receipt printer.

Re-Printing Till Totals

The facility to re-print any Till Total has always been in place, but has now been made more accessible. If you now need to re-print any totals within the last 14 days, press on **No Sale**, then highlight **Till Totals** and press **OK**.

The new option to **Recall** is now in options at the bottom of the screen. Press this button to display all Checks and Lifts performed in the last 14 days.



The icons denote whether the entry is a Check or a Lift:

📄 - Check
📄 - Lift

Select the Till Total you wish to review and press **OK**. The Till Total is now displayed and can be printed in the normal ways.

Till Totals Activity Report

A new report has been added to your system. In the Reports section under Sales Analysis heading there will be a *Till Totals Events* report.

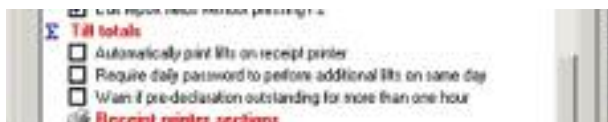


Highlight the report and press **Run** and select the date range, till number, assistant and event type you wish the report about. Press **OK** when complete to view the report.



Till Total Options

A number of additional options have been added to help make till lifts easier and reduce problems at the end of the day. These options can be found in **Admin, System Configuration, Options** and in the **Till Totals** section.



Auto Print Till Lifts

As almost all till lifts are printed out, an option has been added to automatically print the totals on the receipt printer whenever a lift is performed. Place a tick in the "Automatically print till lifts on receipt printer" option to use this feature.

Multiple Lift Protection

On occasion, through confusion, more than one lift may be performed if an error occurs with printing or similar. Immediate subsequent lifts are naturally all zero, as the initial lift clears the figures. With the "Require daily password to perform additional lifts on same day" option selected the user is forced to contact the CareDesk. The CareDesk will then determine why a subsequent lift is required and explain other methods of retrieving the information to the user.

Outstanding Pre-Declarations

Lifts which require a pre-declaration from the user are effectively a two stage procedure. On occasion the second stage, the pre-declaration, has not been completed on the same day as the first stage, the lift. Consequently the lifts and pre-declarations run out of sync and do not match each other. By selecting the "Warn if pre-declaration outstanding for more than one hour" option, an hour is allowed to count the cash drawer contents and declare them, otherwise a message will appear before each sale to remind the user the pre-declaration is outstanding.

Purchases

Purchases Screen

Almost all of your orders will be built and accepted through the Purchases Screen. This is a separate part of Analyst and works independently of the Previous Sales screen and the selling functions of the system. If you need to make a sale at any time during the order process, press the **Sales** button. As you complete your sale the order will still be waiting for you when you finish. You will not have to keep re-doing it.

To get into the Purchases screen press the **Purchases** button on the screen.







The Purchases Screen always has the same six options at the top (although there may be more depending on your settings). These are options to build and accept orders which we will look at in the following sections. The lines underneath the top 6 lines (usually with arrows next to them) are orders that are in the system.

Purchases and Transfers
Support: 0544 800 7680

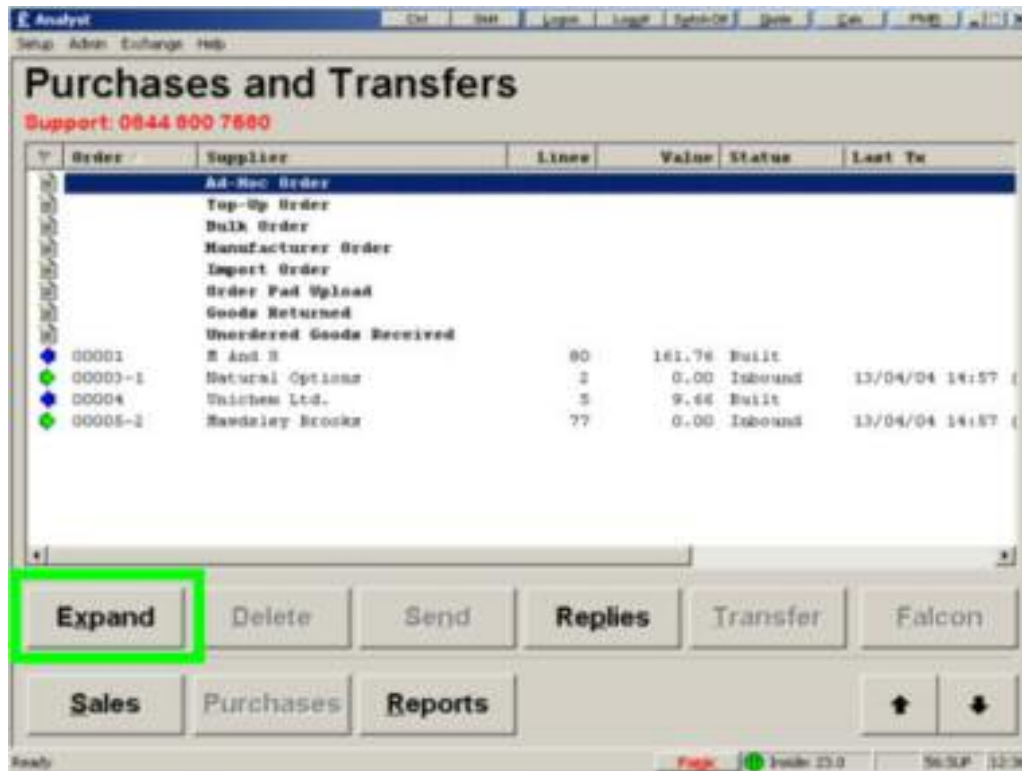
Order	Supplier	Lines	Value	Status	Last Tx
Ad-Hoc Order					
Top-Up Order					
Bulk Order					
Manufacturer Order					
Import Order					
Order Pad Upload					
Goods Returned					
Unordered Goods Received					
00001	R and S	80	181.76	Built	
00003-1	Natural Options	2	0.00	Inbound	13/04/04 14:57
00004	Unichem Ltd.	5	9.66	Built	
00005-2	Sawdeley Brooks	77	0.00	Inbound	13/04/04 14:57

Buttons: Expand, Delete, Send, Replies, Transfer, Falcon, Sales, Purchases, Reports

-  Orders that have a blue arrow next to them are orders that have been built and are ready to send.
-  Orders that have a green arrow next to them are orders that have been sent and are waiting to be delivered.
-  Orders that have a green tick next to them have been accepted. They will remain on this screen for a few days in case any queries about the order arise.
-  Orders that have a dustbin next to them have been discarded.

Ad-Hoc Orders

An Ad-Hoc order is an order made by you whenever you feel you need something that the system hasn't ordered for you. To perform an Ad-Hoc order, highlight the **Ad-Hoc Order** option and press **Expand**.



The screen will now ask which supplier you wish to build the order for. Highlight the appropriate supplier and press **OK**.



The main order screen will now appear.



To add items to the order press **Add** button.



Type in the description or code of the item and press OK. A graph will appear which will help you see how many of the items you have been selling and ordering over the last 13 months. Other information is included under the graph to help you.



When you have decided how many you need, type in the amount and press **Order**. The screen will return to the main order screen with the line we have just added highlighted in blue.

New Order: F Maltby & Sons Ltd. (Building)
 Lines: 1; Value: £9.30

Description	Code	Stock	On Order	Ordered	Required	Case
Lynx Body Spray Aerosol ...	P2251633	2	0	6	6	6

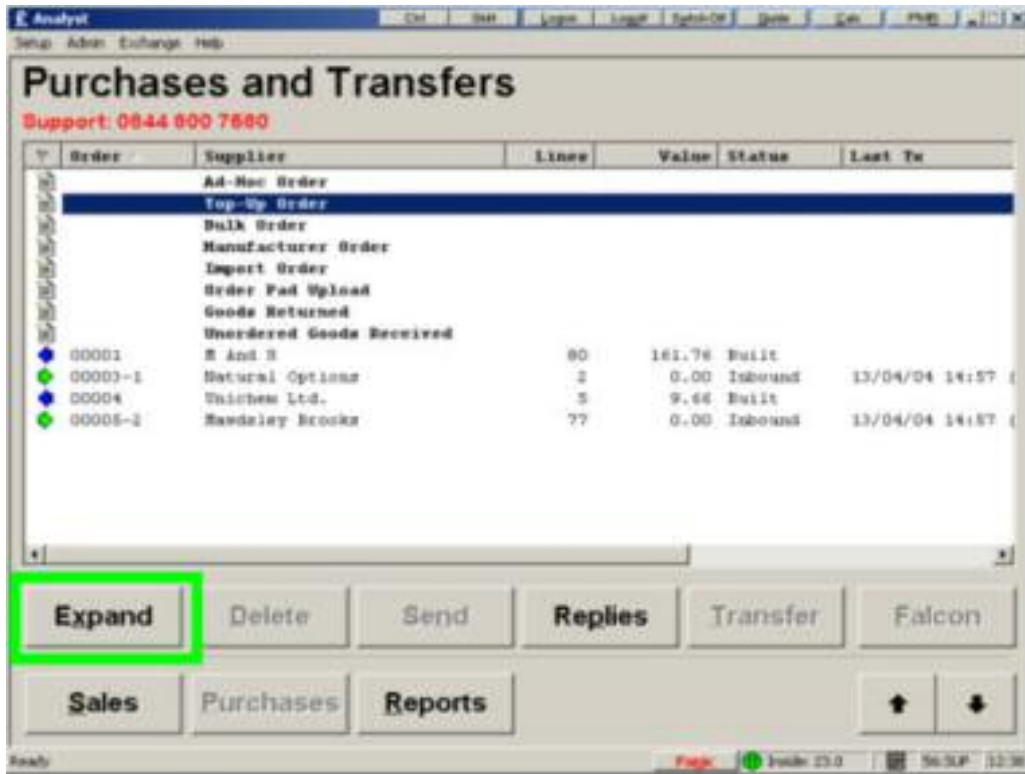
Buttons: Action, Print, Add Desc, Add Code, Quantity, Search, Sales, Purchases, Reports, Save, Quit, ↑, ↓

Continue to add lines in the same way. If you prefer to add the product by either the order code or even to scan the barcode of the items, press the **Add Code** button and type or scan the code in.

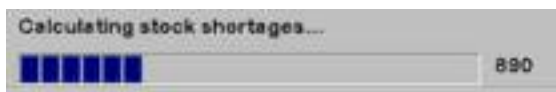
Daily (Top-Up) Orders

A Daily or Top-Up order is the most commonly used ordering method in Analyst. When you perform a top-up order the system works out how many of each item you need in the shop and compares it to the number you have. It then suggests that you order what it expects you will sell, but do not have enough of.

To perform a top-up order highlight the option on the screen and press the **Expand** button.



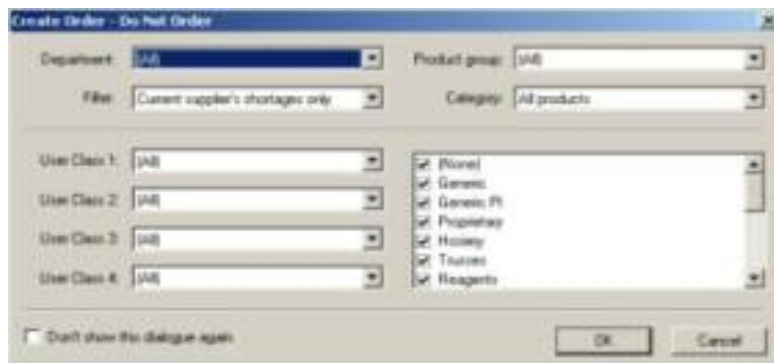
The bottom of the screen will change as the system works out what you need.



When the blue bar reaches the end, the screen will change again and show you a list of suppliers it thinks you need stock from.



Select a supplier you wish to order from and press **Expand**. A filter screen can appear which allows you to only order certain types of item from here. Press OK for all items or filter the order by department, group, user classes or any of the categories listed. If you always wish to see all items, check the box in the bottom left to prevent this filter dialogue showing again. This changes a setting in the purchases section of the [System Configuration](#).



The suggested order is now displayed.

Analyst Ctrl Alt Login Logout Sales-CP PMS MacOns

Home Admin Exchange Help

Order 07417: Murrays (Building)

Lines: 33; Value: £151.76

	Description	Pack	Code	Ordered	Stock	On Order	Orig
A	AquaFresh Floss Kid Tooth...		67998	1	-1	0	C
A	Astor 4 Window Christmas...		223331	1	-1	0	C
A	Bepanthen Nappy Rash Oint...		F2911428	4	-4	0	C
A	Bluebird Single Wall Yamb...		501551412...	2	-2	0	C
A	Clearasil Complete Instant...		500016703...	1	-1	0	C
A	Colson 36 Smart 4.3 X ...		501212848...	4	-4	0	C
A	Dove Softening Silk Bath ...		400038842...	1	-1	0	C
A	Dylon Washing Machine 200...		500032500...	1	-1	0	C
A	Dylon Washing Machine 200...		500032500...	1	-1	0	C
A	Forget-Me-Not Dust Cushs ...		502768402...	1	0	0	C
R	Geviscon 250 Tablets 150E...		500015804...	1	-1	0	C
R	Geviscon 250 Tablets 150E...		500015804...	2	-2	0	C
R	Head Girl Hair Clips, Pin...		F1370450	1	-1	0	C
A	Head Girl Ponytails Brl...		501843201...	2	-2	0	C
A	Junior Sacore Feeding Bot...		501843200...	1	0	0	C
A	Junior Sacore Training Cup		501843200...	1	-1	0	C
R	Kodak Colour Negative Fil...		P0305516	2	-2	0	C

Action Print Add Quantity Search

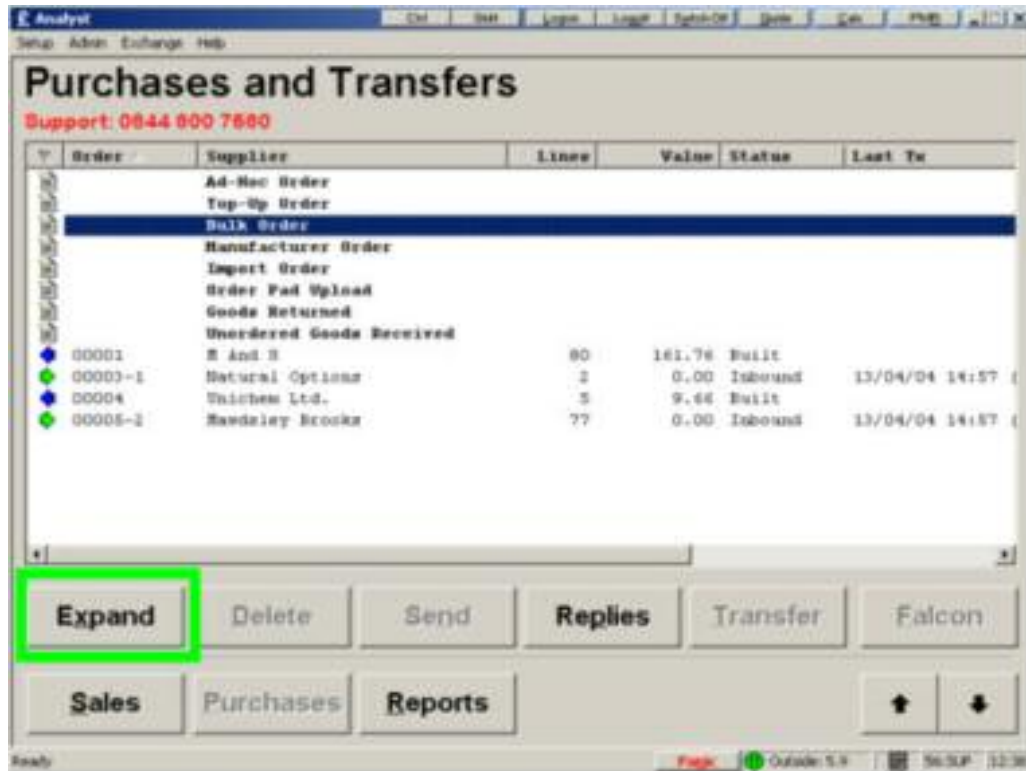
Sales Purchases Reports Save Quit ↑ ↓

Ready 27/3/97 13:07

Each of the items are listed with their order code, stock level, how many are already on order, how many the system wants to order, how many it thinks are required (usually the same as ordered) and the case size. The blue letter next to each line; either an A or an R, indicates which method has been used to calculate the quantity displayed. See the Re-Order Methods topic for more information.

Bulk Orders

Bulk orders work in a very similar way to Top-Up orders, except that rather than using the suppliers lead time, you are asked for the length of time the order must last. To perform a bulk order, highlight the **Bulk Order** on the Purchases Screen and press **Expand**.



The bottom of the screen will change to prompt you how long the order must last in days. If this is a 3 monthly order, type in 90 days and press OK.



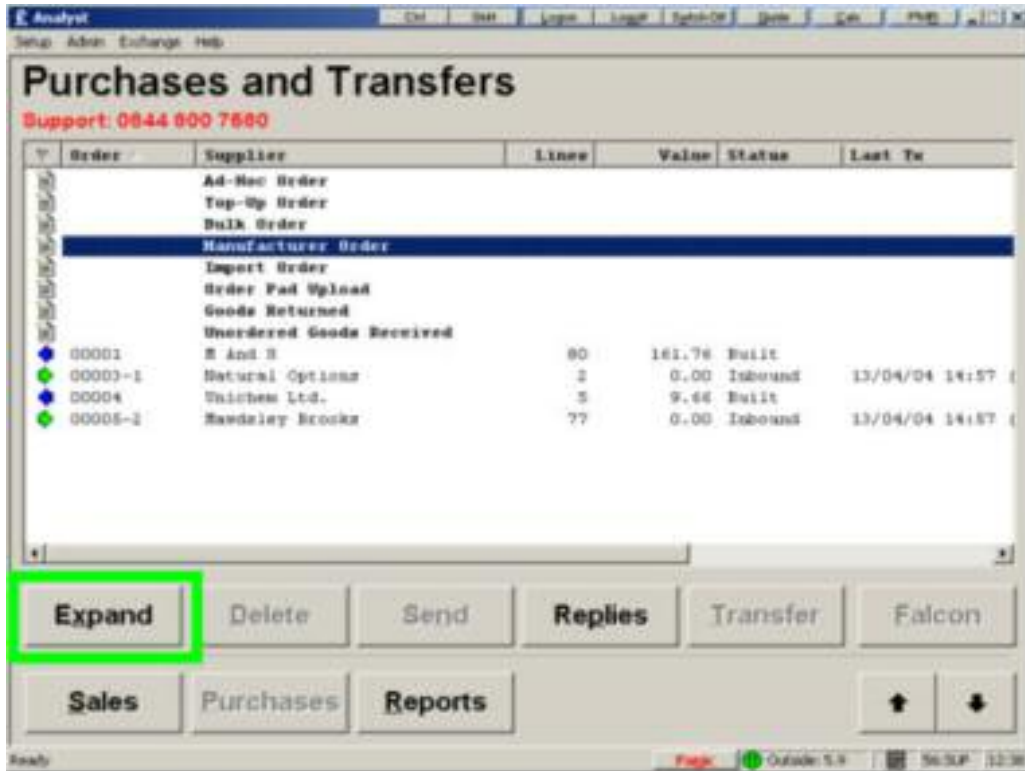
The stock shortages are now calculated for the stock period you have just specified. The supplier of items ordered may differ from the daily orders, as two different suppliers can be specified in the product setup, one for daily orders, one for bulk orders.

The procedure is now the same as doing Top-Up orders

Manufacturer Orders

Rather than order from a supplier, the system can generate orders direct from manufacturers. This is mainly used when reps come and visit you.

To perform a manufacturer order, highlight the **Manufacturer Order** option on the Purchases Screen and press **Expand**.



The bottom of the screen will change to prompt you how long the order must last in days. If this is a 3 monthly order, type in 90 days and press OK.



The stock shortages are now calculated for the stock period you have just specified.

The procedure is now the same as doing Top-Up orders.

Changing Order Quantities

The system will only ever suggest the amount of an item to order. There are two ways of changing the order quantity.

Using the keyboard

Highlight the item you wish to change the quantity of and press either the + (plus) or * (asterisk) to increase the quantity by 1. Repeatedly press + or * to increase by more than 1. Conversely, press the - (minus) or / (slash) to reduce the item by one.

If you wish to access the order quantity dialogue, pictures above, press **Alt+N**. The amount can be typed directly into the quantity box and press **Enter** to accept.

If continuous data entry is enabled on your system this dialogue will appear for the next item in the order. If so you can press **Cancel** to return to the order list.

Using the touch screen

Highlight the item you wish to change the quantity of and press the **Quantity** button. The order quantity window will then appear.



Type in the amount you wish to order and press **Order**.



If continuous data entry is enabled on your system this dialogue will appear for the next item in the order. If so you can press **Cancel** to return to the order list.

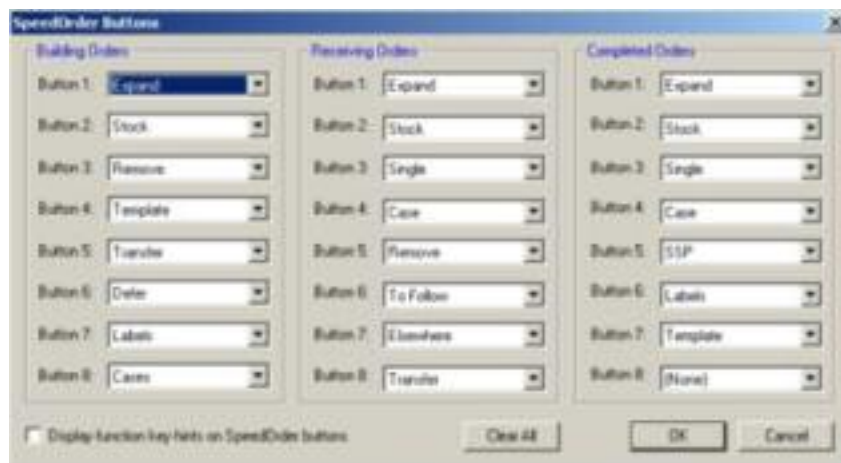
SpeedOrder Buttons

A row of eight buttons can be added to the ordering screens to speed up access to the functions found under the action button.



Configuring the SpeedOrder Buttons

There are three sets of buttons as there are three different order screens. Each of the screen can have a different set of buttons. The setup for all screens is contained from Setup and SpeedOrder buttons.



In each case Button 1 will appear on the left and Button 8 on the right accessible with buttons F5 to F12 respectively. The F-key short cuts can be embossed on the buttons by clicking the option at the bottom left.

Select the functions for each button. An explanation for them is detailed below.

Use the **Clear All** button to set all buttons to (None). If all the buttons for a screen are set to (None) then the SpeedOrder buttons are not displayed at all.

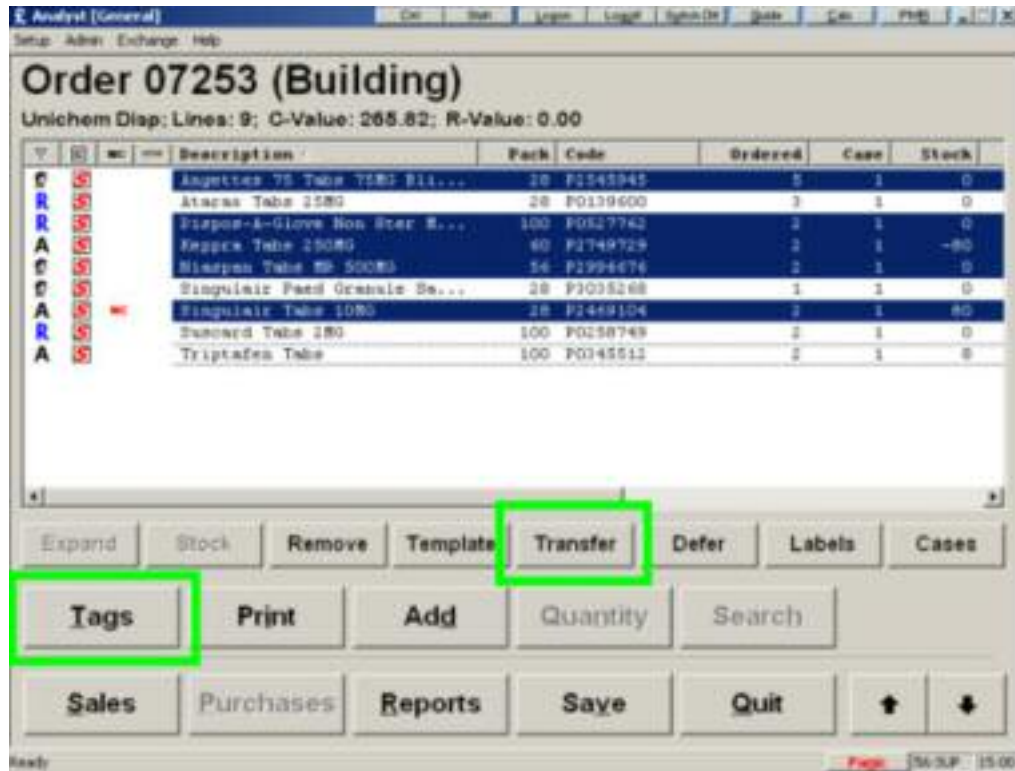
Here's a list of the buttons available on each screen and what they do.

Building	Receiving	Completed	Function
(None)	(None)	(None)	This button will be blank. If all buttons are (none) the SpeedOrder buttons disappear.
Expand	Expand	Expand	Opens product editor for this line.
Labels	Labels	Labels	Print product labels for the highlighted line(s).
Stock	Stock	Stock	Enter the stock level of this line.
Template	Template	Template	Apply a product template to the highlighted line(s)
	Single	Single	Edit the single cost price for this line.
	SSP/Retail	SSP/Retail	Edit the SSP/Retail price for this line (depends on which is displayed - see supplier setup)
Case			Edit case rounding rules.
	Case	Case	Enter a case cost price for this line.
Defer			Defers the order of this line.
Remove	Remove		Removed the highlighted line(s) from the order.
Transfer	Transfer		transfers the highlighted line(s) to another order.
	Elsewhere		Flags the highlighted line(s) to re-order elsewhere/anywhere.
	To Follow		Marks the highlighted line(s) to follow on a subsequent delivery

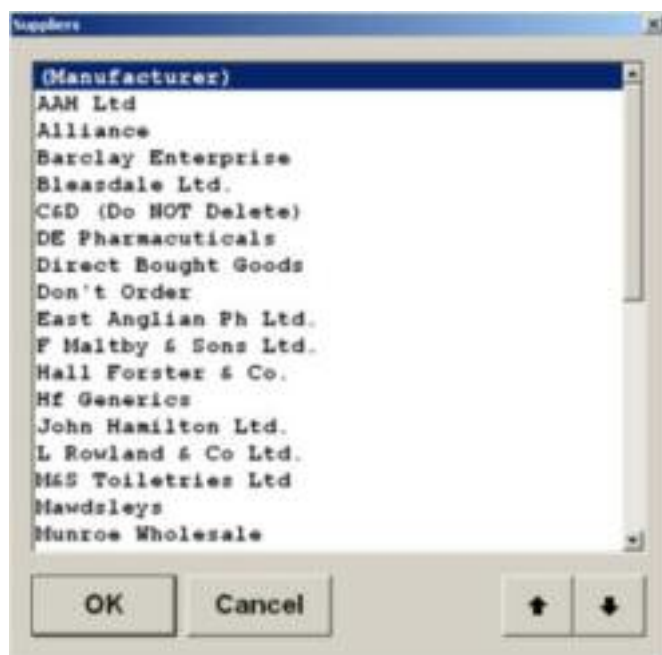
Transferring Order Lines Between Suppliers

Whilst building an order it is easily possible to transfer a line, or number of lines, to an order for another supplier.

Highlight the line to transfer or multi-select the lines to transfer and click the **Transfer** button on the SpeedOrder buttons or if there isn't one click **Action** or **Tags** button (same button, but it depends on how many items are selected), then click the **Transfer** button.



Select the supplier to transfer them to and click **OK**.



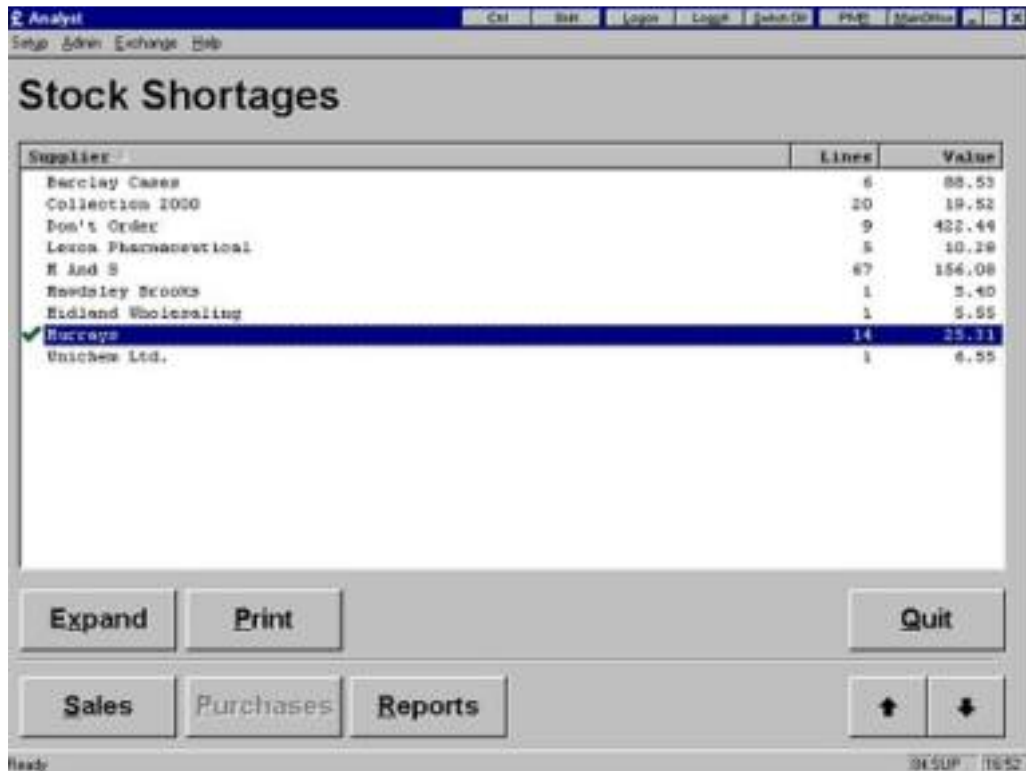
Depending on your system configuration options you might be invited to update the products' Daily Supplier so in future Analyst will place them onto an order for the new supplier.



The 'Don't show this message again' option will de-select the option in the system configuration.

Saving Orders

When you are happy with the order you have built and amended press the **Save** button. The screen will return to the Stock Shortages screen, but now with a tick next to the order we have just saved.



If you would like to create an order for another supplier, highlight the supplier and press **Expand**. Otherwise press **Quit**.

The screen will now return to the Purchases Screen and you will see that the order we have just built is at the bottom of the list.

Purchases and Transfers
Support: 0844 800 7880

Order	Supplier	Lines	Value	Status	Last Tr
	Ad-Hoc Order				
	Top-Up Order				
	Bulk Order				
	Manufacturer Order				
	Import Order				
	Order Pad Upload				
	Goods Returned				
	Unordered Goods Received				
00001	S and S	80	161.78	Build	
00003-1	Natural Options	2	0.00	Inbound	13/04/04 14:57
00004	Spicbee Ltd.	5	2.46	Build	
00005-2	Sawdley Brooks	77	0.00	Inbound	13/04/04 14:57

Expand Delete Send Replies Transfer Falcon

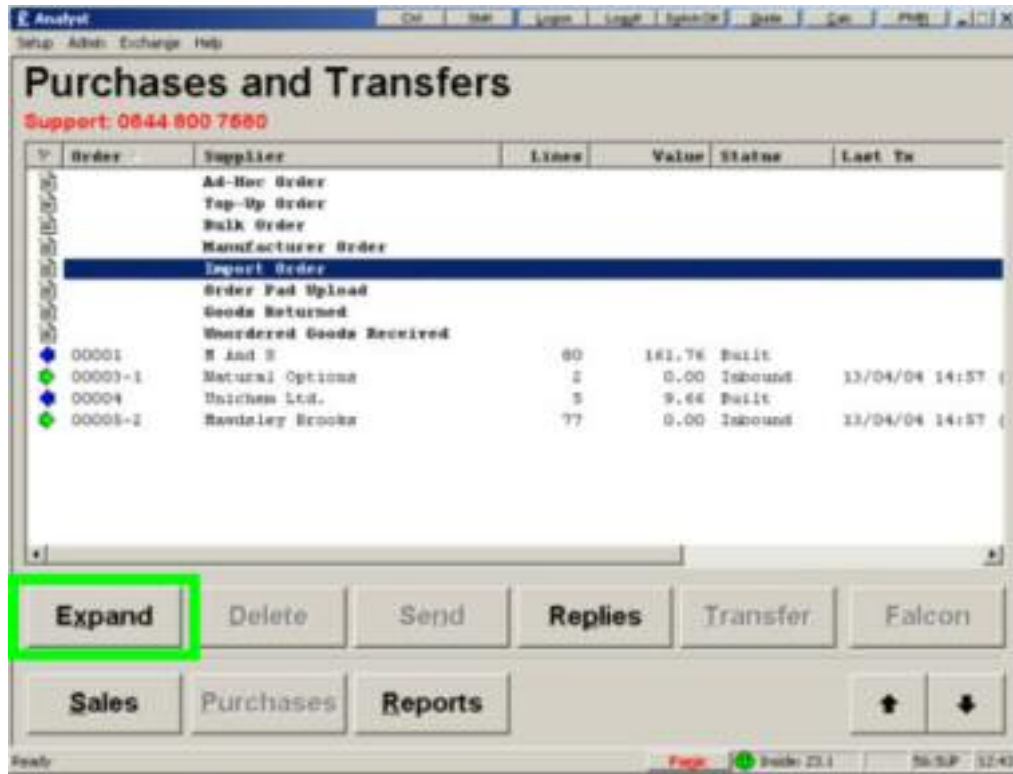
Sales Purchases Reports

Ready Falcon Outside 1.0 36.33P 11:40

There is a blue arrow pointing outwards indicating that we have built the order, but not sent it yet.

Importing Orders

If another system or method is employed to generate orders but you would still like to use Analyst to send the order and receive the goods, the order can be imported. The external order must be presented to Analyst in a CSV format with three columns: order code, description and order quantity. The location of this file should be noted.

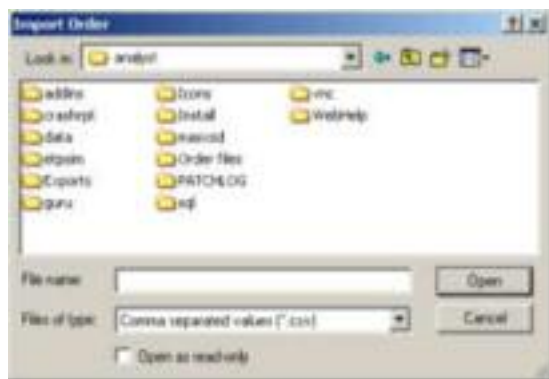


To import the file highlight the Import Order option on the Previous Sales screen and click **Expand**, or double click the option.

Analyst must associate the order with a supplier. Select which supplier the order is destined for. If the order is to be split across a number of suppliers, select the main one.



Double click the supplier or highlight them and click **OK**.



Use the file browser to locate the file to import. Highlight it and click **Open**.

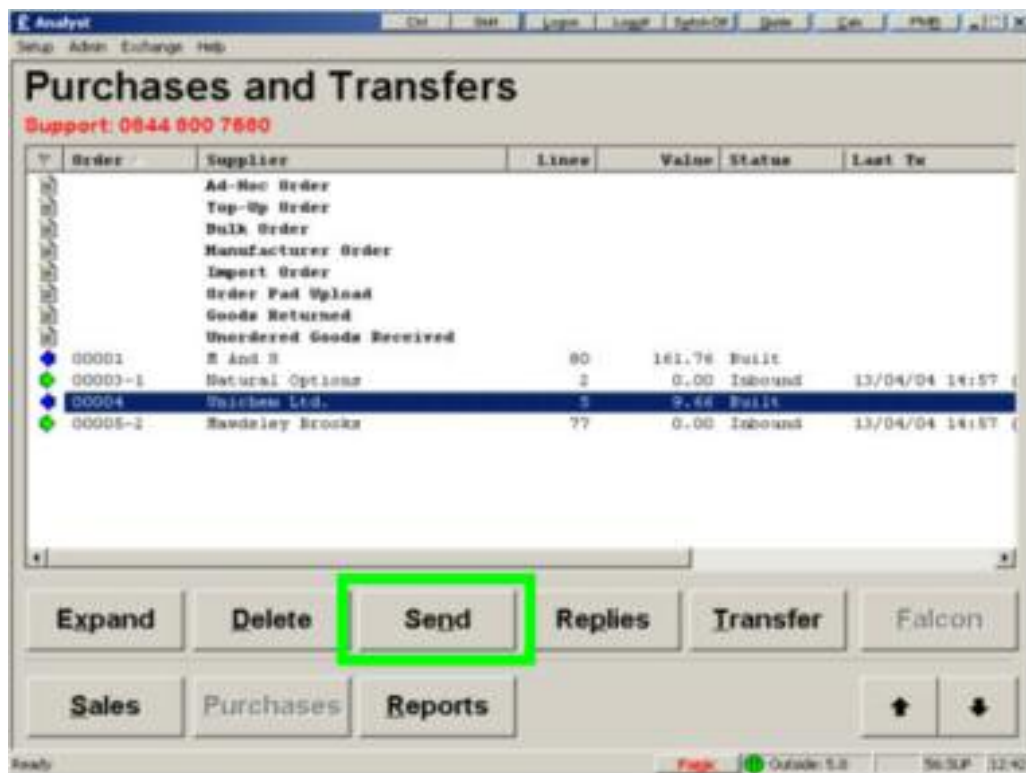
Sending Orders

Once we have built our order, we can now send it to the supplier. There are several ways to do this, but it mainly depends on the supplier and how they can receive orders. Most pharmaceutical suppliers can receive orders sent directly from other computers, some though, can only receive faxes. In Analyst there are five ways to send the order.

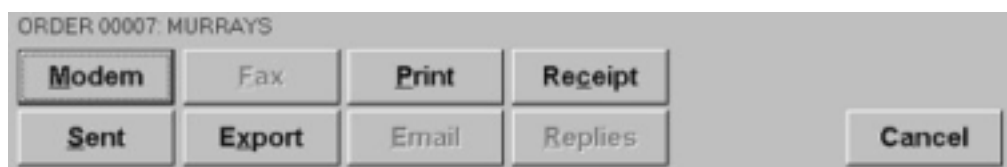
- **Modem** - Orders send directly from the till to the suppliers computers
- **Fax** - Orders send directly from the till to suppliers fax machines
- **Print** - A printout can be manually faxed, posted or handed to a supplier
- **Email** - Orders e-mailed directly to the supplier. (only if you have an internet account setup on the till)
- **Export** - The order can be saved on disk to be given or sent to a supplier.

The top three are most commonly used.

Once you have decided how you are going to send the order to the supplier highlight the order on the Purchases Screen and press **Send**.



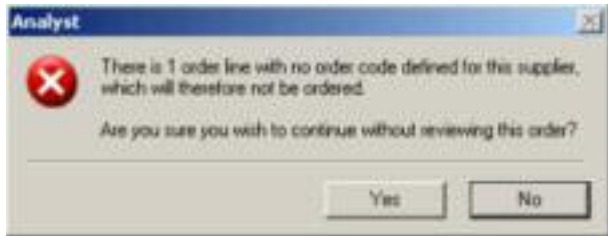
The bottom of the screen will change. Click on the method you are going to use to send the order.



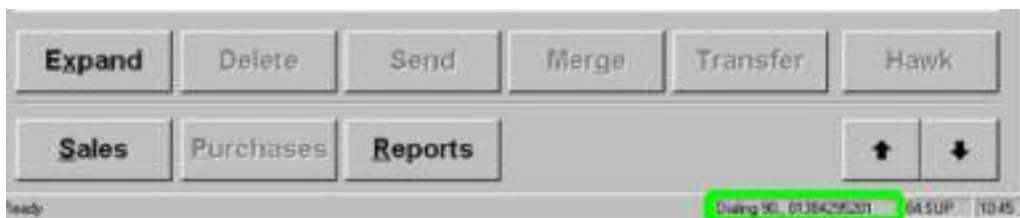
Some of the options are greyed out. The supplier has not been setup to receive orders in these ways. If you are sending by Modem or Fax, the system will need to use the phone line

to dial the supplier. Before pressing the appropriate button, ensure that no-one is using a phone on the same line as the system will use. If you always send to this supplier in the same way you can skip this step by configuring a Default Send Method on the Settings tab of the supplier setup.

If there are any lines which do not have any codes suitable for the supplier a warning will appear and allow review of the order before finally being sent.



In the bottom right of the screen, a small box will display the progress of the order through dialling, sending (Tx) and receiving (Rx).



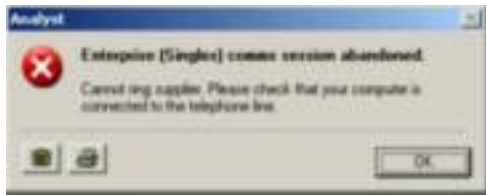
When the order has been successfully sent, the screen will return to the Purchases Screen and the arrow next to the order will turn green and point inwards.

Retrying Transmission Failures

Analyst can be configured to retry failed transmissions in the system configuration. From **Admin** select the **System Configuration** and scroll down to the **Purchases** section. Check the option to "Automatically retry failed order transmissions".



If the transmission of an order by modem fails, Analyst will try and send the order again between 4 and 5 minutes after the original transmission failure to allow you to investigate and remedy the problem.



Up to four transmission retries will be attempted. The time the next retry will be attempted is displayed in the **Next Tx** column.

Lines	Value	Status	Last Tx	Next Tx	created	Origin
5	27.86	Inbound	27/03/04 12:48		27/03/04	Top-Up Order
1	0.00	Inbound	27/03/04 12:52		27/03/04	Manual Entry
1	0.17	Inbound	27/03/04 14:05		27/03/04	Manual Entry
1	0.00	Inbound	27/03/04 14:08		27/03/04	Manual Entry
23	112.60	Complete	28/03/04 12:39		8/03/04	Top-Up Order
3	22.74	Complete	28/03/04 12:42		8/03/04	Top-Up Order
2	11.52	Complete	28/03/04 12:45		8/03/04	Manual Entry
1	19.44	Complete	28/03/04 13:09		8/03/04	Manual Entry
11	181.64	CommFail	28/03/04 17:07		8/03/04	Top-Up Order
1	1.08	Built			8/03/04	Point of Sale
1	1.99	CommFail		10:20 (4)	8/03/04	Point of Sale
8	129.34	CommFail	30/03/04 09:35		8/03/04	Top-Up Order
	0.00	Inbound	30/03/04 10:58 (2)		8/03/04	Top-Up Order
8	24.27	Complete	30/03/04 11:01		8/03/04	Top-Up Order
13	58.99	Inbound	30/03/04 11:02		8/03/04	Top-Up Order
	0.00	Inbound	30/03/04 12:23 (2)		8/03/04	Top-Up Order
10	34.19	CommFail			1/12/03	Top-Up Order

Any order waiting to have transmission retried can still be edited, but the auto retry facility will be disabled for this order. All auto retries will be reset if the software is closed and re-launched.

Viewing Replies

The **Replies** button can be found on the Purchases and Transfers main screen. When pressed it displays a full list of replies that are available from your sent orders. By default, the reply highlighted corresponds to the order which was highlighted on the Purchases and Transfers screen.

Order	Ref	Supplier	Lines	Received	Accepted
00711		Phoenix	10	28/05/03	
00705		Phoenix	34	28/05/03	
00700		Phoenix	35	27/05/03	
00499		Phoenix	35	27/05/03	
00498		Phoenix	35	27/05/03	
00496	ABC123	Hauldeleys - Dispensary	7	08/05/03	
00496	ABC123	Hauldeleys - Dispensary	7	08/05/03	
00496	ABC123	Hauldeleys - Dispensary	7	08/05/03	
07893	243454	Hauldeleys - Dispensary	8	07/04/03	
07894	243526	Hauldeleys - Dispensary	1	07/04/03	
07894	243527	Hauldeleys - Dispensary	1	07/04/03	
07893	243452	Hauldeleys - Dispensary	1	07/04/03	
07893	243453	Hauldeleys - Dispensary	11	07/04/03	
07893	243454	Hauldeleys - Dispensary	8	07/04/03	
07894	243526	Hauldeleys - Dispensary	1	07/04/03	
07894	243527	Hauldeleys - Dispensary	1	07/04/03	
07893	243452	Hauldeleys - Dispensary	1	07/04/03	
07893	243453	Hauldeleys - Dispensary	11	07/04/03	

This screen displays all of the replies and delivery notes available to view. The replies are indicated by the loudspeaker icon and the delivery notes by the clipboard icon.

If any invoices are available to view, the **Invoice** button becomes active.

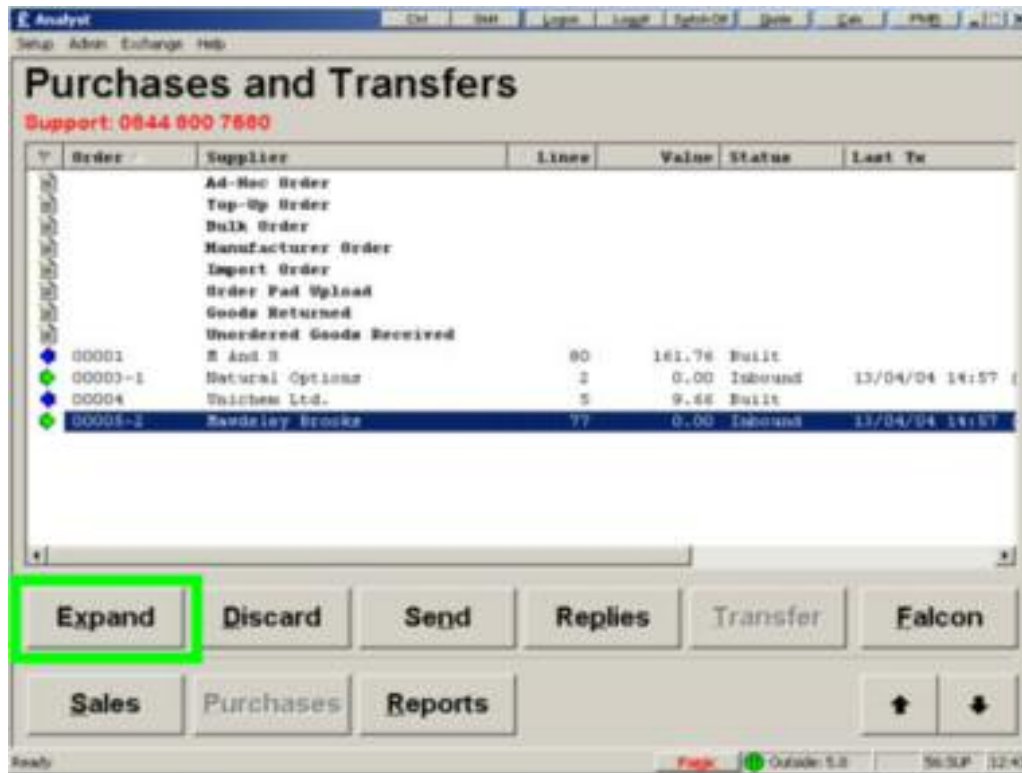
Depending on the supplier you have received the reply from, it may also contain some colour to help highlight the out-of-stock items.

Replies and delivery notes are displayed for the same number of days as completed orders. This can be changed in the [miscellaneous](#) tab of the system configuration.

Receiving Orders

If an order has arrived in the shop that was ordered through the system, it is very straightforward to accept these items into stock. You must accept the order as soon as you can after the delivery has arrived. This informs the system that you have received new stock, so it will not order any more (unless you need it).

To accept an order, highlight the inbound order on the Purchases Screen and press the **Expand** button.



Analyst assumes that you will receive what you order, so it fills in the received column for you. You only need to check items which haven't come in exactly as you ordered them. Check down the received column that you have had the correct amount delivered. If there is any difference highlight the line that needs changing and press **Quantity**.

Order 08407: Phoenix HCare (Inbound)
Lines: 8: Value: £33.82

Description	Pack Code	Ordered	Expected	Received	Stock
Aspirin Dispersible Table...	F0987412	12	12	12	7
Colief Infant Drope 7ML	F2468721	1	1	1	C
Cow & Gate Juice 4 Etha 12...	F2777480	12	12	12	C
Cow & Gate Truly Fruit Ap...	F2946481	21	21	21	1
Cow & Gate Truly Fruit Pl...	F2946499	21	21	21	3
Magnesium Sulphate Paste ...	F0272062	2	2	2	1
Schell Footcure Appliance...	F2168755	2	2	2	-2
Schell Footcure Pad & Pa...	F0565382	2	2	2	C

COW & GATE TRULY FRUIT PLUM BAR 25G

Received:

Buttons: 1, 2, 3, 4, 5, 6, 7, 8, 9, 0, Case (21), OK, Cancel

The bottom of the screen changes to allow you to enter the actual number of items that have been delivered. Type in the correct amount and press OK. If you type in less than the system ordered, a prompt will appear to ask if the remainder will come later.



If a supplier cannot fulfill a whole order sometimes they will deliver it later when they receive the goods without you having to order it again. If this is the case press **Yes** to this question. If you need to re-order the items, press **No**.

When you have checked the amount received for all the lines press the **Accept** button. This will process the delivery and add whatever has arrived to the stock levels in the system. The screen will return to the main Purchases Screen.

Printing Inbound Orders

Inbound orders can be printed and provide an additional summary which is not displayed on screen. This summary calculates the order value at cost and retail value of both the original order and the actual received quantities and displays the margin on the order.

Delivery Substitutions

When receiving lines on delivery it is quite common for the suppliers to send a replacement item for the actual line ordered, especially with generics in the dispensary. In order for your stock control to be accurate the exact line delivered should always be entered and the original line cancelled.

This is made easy with the **Substitute** button on the delivery screen.

Whether or Not to Substitute

Before making full use of this facility you need to be clear how Analyst is being used to dispense or sell items. If each item is being scanned out in the dispensary as well the till then the delivery needs to be very precise and the exact item physically delivered needs to be entered into Analyst.

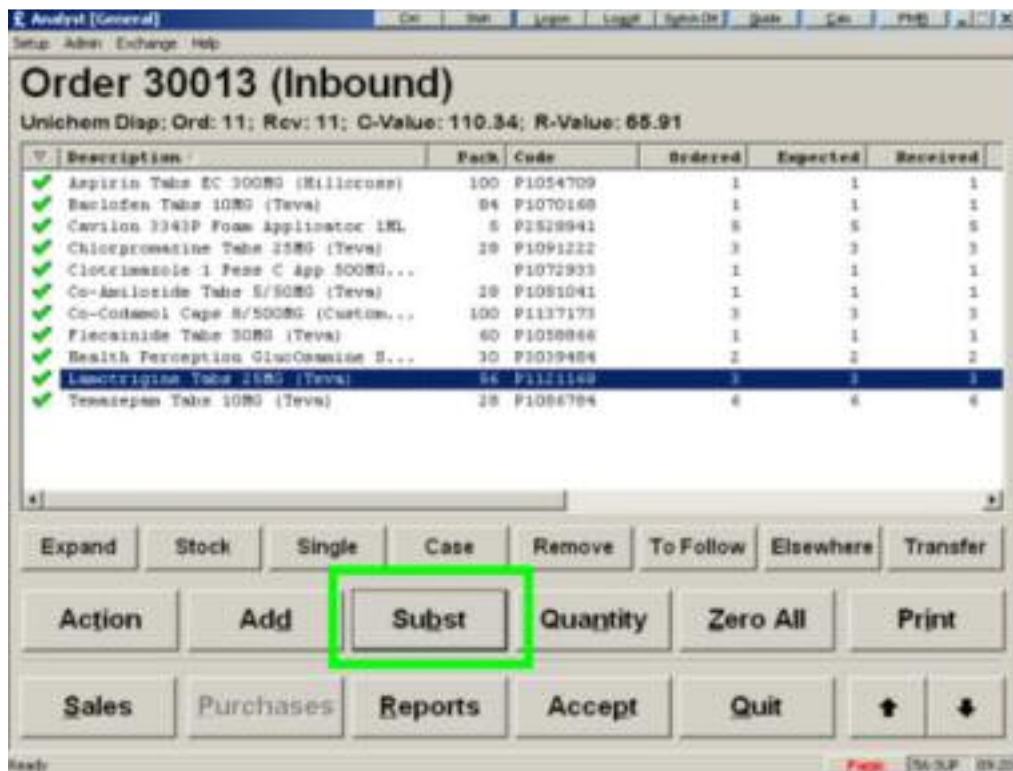
If you use generic headers (dummy products) or a particular brand each time to keep Analyst's active list under control you might not need to substitute, or when scanning the delivery in you might need to deliver the original brand to preserve the active list and affect the stock of the correct line.

The use of the Aggregated Ordering for drug families and product/family substitutions can confuse the situation even further!

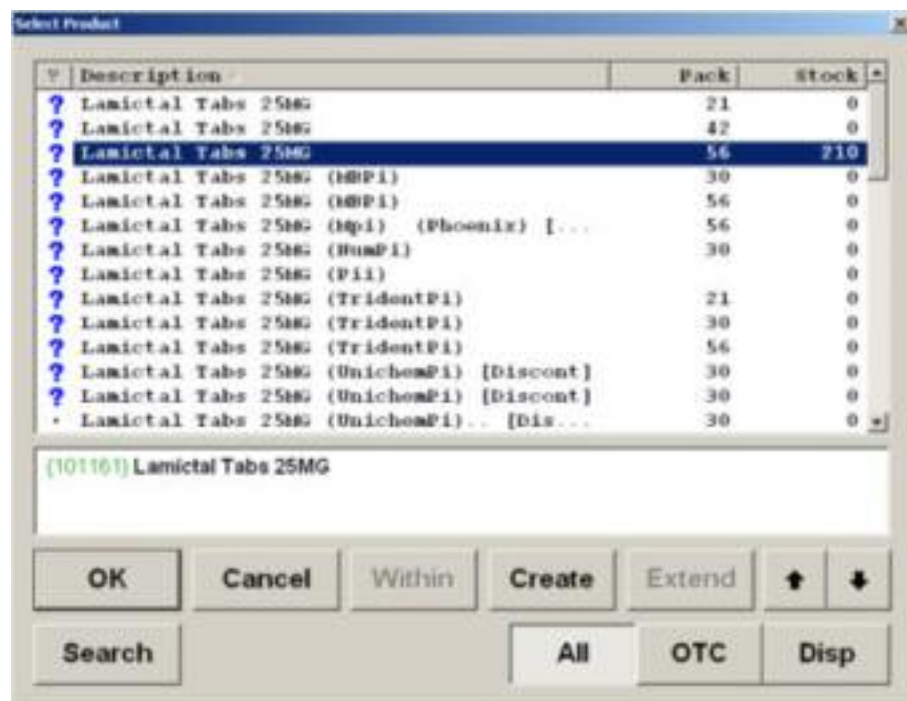
In summary: if you're controlling the stock levels of your items you should deliver the brand of the item you intend to dispense. If you're in any doubt discuss the situation with your trainer or the CareDesk.

Using the Substitute Button

After opening an inbound order the list of ordered items is presented.



Highlight the line which was substituted and click the **Subst** button. Other lines in the same drug family as the highlighted item are displayed.



The list might initially be restricted to only the active lines in the database, depending on your settings. If so the **Extend** button will list the whole contents of the family. Select the actual line that was received and click **OK**.

Now confirm the quantity received.



This defaults to the expected amount of the original item. Confirm or change the amount and click **OK**.

E Analyst [General] Ctrl Del Login Logout System Help Ctrl Print [X]

Setup Admin Exchange Help

Order 30013 (Inbound)

Unichem Diap: Ord: 12; Rcv: 11; C-Value: 170.94; R-Value: 65.91

Description	Pack	Code	Ordered	Expected	Received
✓ Aspirin Tabs EC 300MG (Billicross)	100	P1054709	1	1	1
✓ Barclofen Tabs 10MG (Teva)	94	P1070160	1	1	1
✓ Cavilon 3343P Foam Applicator 1ML	5	P2528941	5	5	5
✓ Chlorpromazine Tabs 25MG (Teva)	20	P1091222	2	2	2
✓ Cloxacillin 1 Feas C App 500MG...		P1072933	1	1	1
✓ Co-Amoxiclav Tabs 5/50MG (Teva)	20	P1081041	1	1	1
✓ Co-Codamol Caps 8/500MG (Custom...)	100	P1137173	2	2	2
✓ Flecainide Tabs 30MG (Teva)	60	P1058844	1	1	1
✓ Health Perception Glucosamine H...	30	P3039484	2	2	2
✗ Lamotrigine Tabs 25MG (Teva)	56	P1121149	2	2	0
✗ Lamictal Tabs 25MG	56	P0909708	0	0	2
✓ Temazepam Tabs 10MG (Teva)	20	P1086784	6	6	6

Expand Stock Single Case Remove To Follow Elsewhere Transfer

Action Add Subst Quantity Zero All Print

Sales Purchases Reports Accept Quit ↑ ↓

Page 16/37 09/21

The order screen returns. The original line has been cancelled with a received quantity of zero. The substitute line is displayed directly beneath the original line, is indented and has a separate icon so it can be seen at a glance.

Substituting Scanned Lines

A delivery can also be quickly entered by scanning lines in, though this method is more appropriate in a consolidated order where each line must be identified.

Open the order (or orders) to be delivered and scan each item in turn. It doesn't matter which order they are scanned in. If the scanned item is a direct match for an item on the order you will just need to confirm the amount which has been delivered.

If there is no match for the scanned item and there is no other item on the order which is in the same family, the item will be entered onto the order as un-ordered goods. Again, confirm the amount received.

If there is no direct match for the scanned item but a similar item, one in the same drug family, is found the substitute dialogue appears.



The details of the scanned line appears at the top. In the pane are the items which were found on the order which are in the same drug family as the scanned line. There will usually be only one line, but in the event of there being more you will need to select which of the original lines on the order this scanned line is a substitute for. Then click one of the four buttons beneath:

Unordered Goods

If the scanned item is unrelated to any of the matching lines in the order, and was received as bonus stock click this option. This will append the scanned line to the foot of the delivery without affecting any of the original lines.

Description	Pack	Expected	Received
Health Perception Glucosamine S...	30 P3039404	2	2
Lamotrigine Tabs 25MG (Teva)	56 P1121169	3	3
Lamotrigine Tabs 25MG (Teva)	56 P1090788	0	4

Substitute for Original

This will most commonly be the case. If the highlighted original line in the pane was ordered, but the supplier has despatched the scanned line instead, this is the option to use. This will add the scanned line to the delivery with the default amount of the expected quantity of the original line. The On Order quantity of the original line will be reduced by the amount received of the scanned substitute, while the scanned line will be put into stock.

Description	Pack	Expected	Received
Lamotrigine Tabs 25MG (Teva)	56 P1121169	3	0
Lamotrigine Tabs 25MG	56 P0900788	0	3

Receive as Original

This is a potentially dangerous option and so is turned off by default in the system configuration. This will receive the original line selected in the pane and *not* the scanned line. This will increase the stock and reduce the On Order qty of the original line. There will be no record of the substitute line received.

Description	Pack	Expected	Received
Flunitrazepam Tabs 50MG (Teva)	40 P1058066	1	1
Lamotrigine Tabs 25MG (Teva)	56 P1121169	3	3
Lamotrigine Tabs 25MG (Teva)	56 P1090788	0	0

This is considered dangerous as with all the other options the actual line received is entered into Analyst, but with this option one item is entered into Analyst and another item is put on the shelf. This option would normally be used with the product / family substitutions and/or aggregated ordering and some of the options associated with that.

Discarding Inbound Orders

Some orders which are sent will not be fulfilled in their entirety. Some items might be unavailable and they will be re-ordered from a different supplier. To help make the removal of these orders easy the button normally marked as **Delete** becomes **discard** when an inbound order is highlighted.



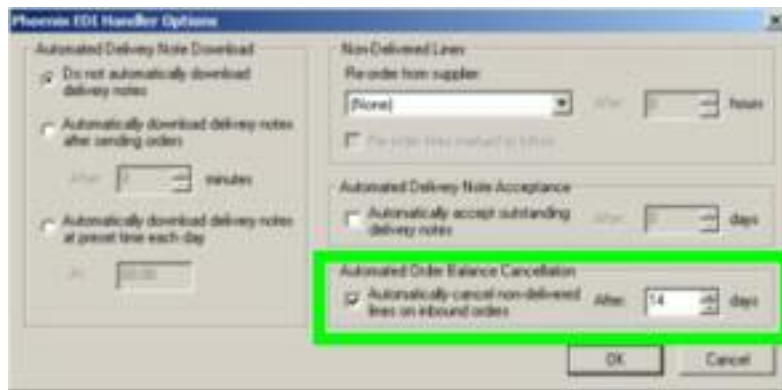
When the **Discard** button is pressed a confirmation box is displayed to ensure the order is not deleted in error.

The order is then displayed as complete and all items contained on the order or part-order that was discarded are displayed as having no stock delivered.

Automated Order Balance Cancellation

For Phoenix EDI customers a option exists for outstanding part 2 and subsequent orders to be automatically cancelled or discarded after a set period of time. This can help combat the build up of residual order fragments over time.

To setup the automatic cancellation of these, select the Phoenix or appropriate supplier using the Phoenix EDI from the list in **Setup, Product Groupings, Supplier**. In the "EDI Data Exchange" setting click the **Options** button.

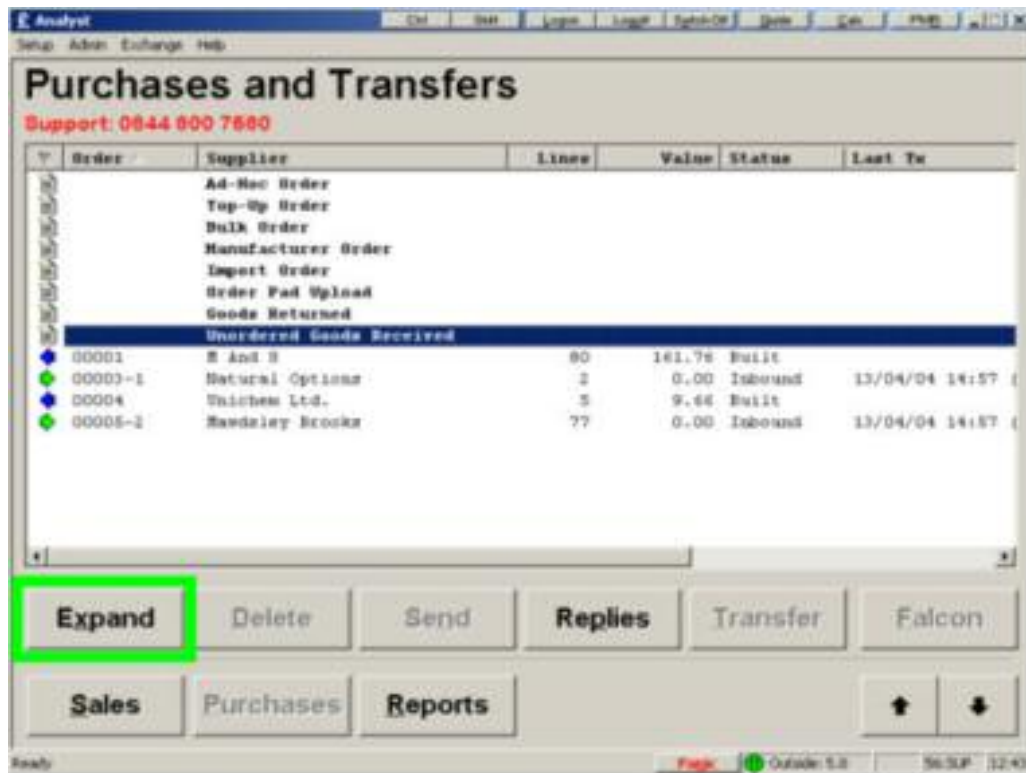


The option can be set at the bottom right of the options screen. When set any part 2 or subsequent order not amended for the time specified will be discarded in the manner explained above.

Unordered Goods Received

There will be occasions where you receive a delivery that has not been ordered through the system. The system needs to know about this new stock so that it doesn't try order it for you again.

To enter this stock into the system on the Purchases Screen, highlight **Unordered Goods Received** and press **Expand**.



A blank delivery screen now appears.



Add each product line-by-line to this screen. Work through your delivery note, or use one of each of the products to type in either its description or scan its barcode.

To add by description, press the **Add Desc** button. A search box appears for you to find the product.



When you have found and selected the product, the bottom of the screen changes for you to type in how many were delivered.



Type in the number and press OK. The line now appears on the screen, you can see that I have delivered 3 of this item.

Unordered Goods Received
Lines: 1: Value: £9.42

Description	Code	Ordered	Expected	Received	Stock	Singles
U Gillette Blades Sensor E...	117278	0	0	3	5	3.14

To add the items by code press the **Add Code** button and repeat the steps as above.

Order code

1 2 3 4 5 6 7 8 9 0 - +
 Q W E R T Y U I O P ()
 A S D F G H J K L ; ' !
 Z X C V B N M , . ? *
 & \ (Space) / # =

OK Cancel Caps A-Z

If you have the product at hand, the barcode can be scanned at this stage to speed things up. When you have entered all of the items in the delivery press the **Accept** button.

E Analyst
Setup Admin Exchange Help

Unordered Goods Received
Lines: 2: Value: £28.62

Description	Code	Ordered	Expected	Received	Stock	Singles
U Gillette Blades Sensor E...	117278	0	0	3	5	3.14
U Bovisax Cold Sore Cream ...	70081208	0	0	4	5	3.55

Action Print Add Desc Add Code Quantity Hawk
 Sales Purchases Reports Accept Quit ↑ ↓

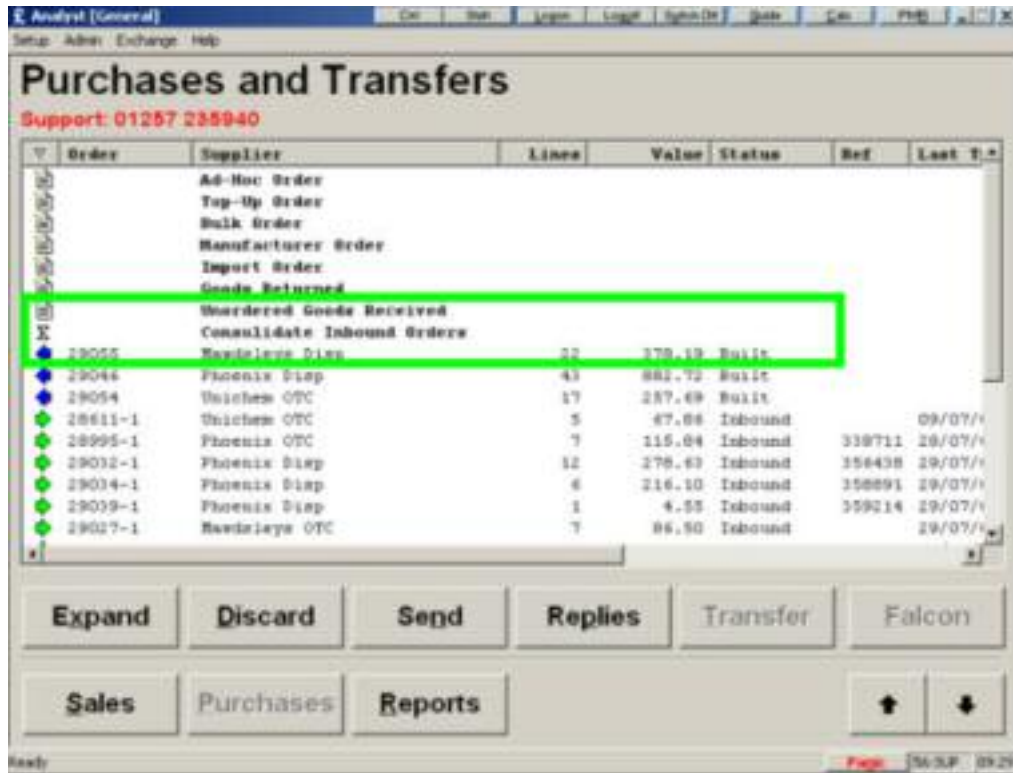
Ready: 09:50:11 10/05

This will update the stock levels in the system.

Consolidated Orders

Follow on orders from suppliers are quite common. When they finally do send an item which was ordered a while ago, it can be mixed amongst a current order and it's not always clear when the item was originally ordered. So finding the original order on Analyst is very hard.

By selecting the **Consolidated Orders** option all of the outstanding orders for each supplier are combined into one easy-to-view list.

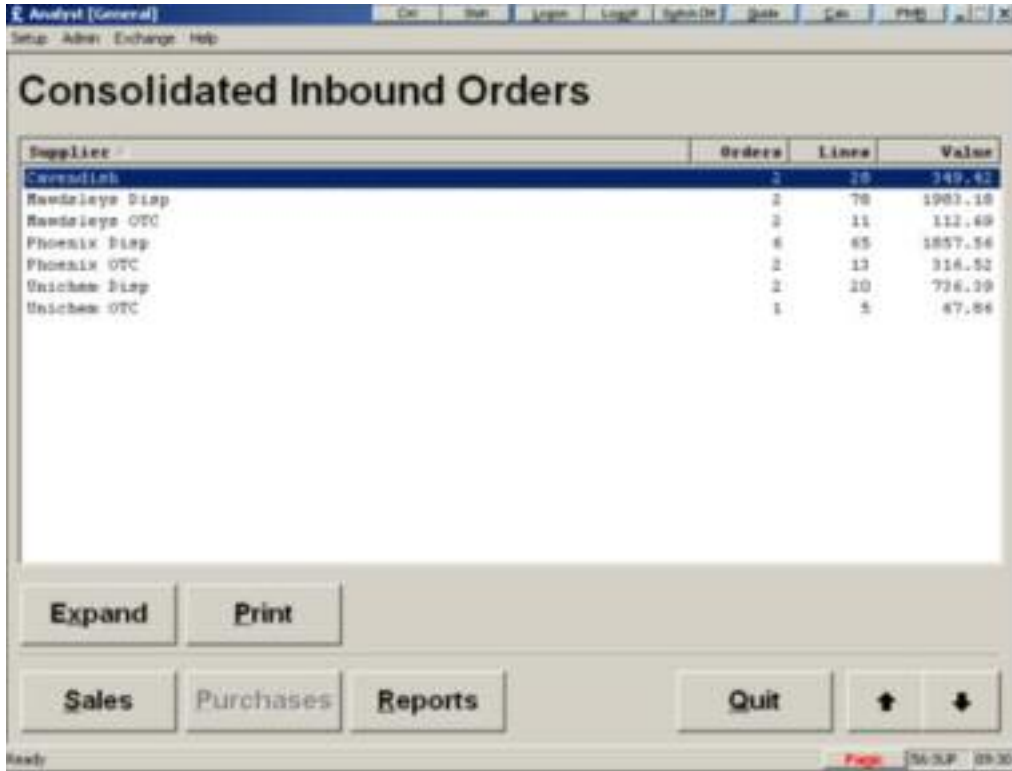


Purchases and Transfers
Support: 01257 235940

Order	Supplier	Lines	Value	Status	Ref	Last T.
	Ad-Hoc Order					
	Top-Up Order					
	Bulk Order					
	Manufacturer Order					
	Import Order					
	Goods Returned					
	Unordered Goods Received					
	Consolidate Inbound Orders					
29055	Rawdiaya Disp	22	378.13	Built		
29044	Phoenix Disp	43	881.72	Built		
29054	Unichem OTC	17	257.69	Built		
28611-1	Unichem OTC	5	47.88	Inbound		09/07/1
28995-1	Phoenix OTC	7	115.04	Inbound	338711	28/07/1
29032-1	Phoenix Disp	12	278.63	Inbound	358438	29/07/1
29034-1	Phoenix Disp	4	216.10	Inbound	358891	29/07/1
29039-1	Phoenix Disp	1	4.55	Inbound	359214	29/07/1
29017-1	Rawdiaya OTC	7	86.50	Inbound		29/07/1

Buttons: Expand, Discard, Send, Replies, Transfer, Falcon, Sales, Purchases, Reports

Double click the option or highlight it and click **Expand**. Analyst looks through all the outstanding orders and displays a summary of suppliers.



The number of outstanding orders for each supplier is displayed with the number of lines on those orders and the total value. Note that the number of lines listed on this screen may not match the number eventually displayed in the consolidated as there may be the same line on more than one order at this stage.

Highlight a supplier and click **Expand** to view the list of items.



The list of all outstanding items for that supplier is now displayed. The list takes the form of a normal inbound order. The main difference is that the Received column is set to zero by default, so if working from an invoice *all* of the lines must be checked and entered, or *all* of the items must be scanned in.

Entering the Delivered Quantity

As this is a consolidation of all outstanding orders there is no way for Analyst to predict which order you are delivering. So nothing is assumed. If this is a normal delivery from a normal order it might be easier to use the traditional method of receiving an order.

To deliver an item on this consolidated screen the quantity delivered of each item must be entered. As quantities are entered into the screen the summary at the top changes to reflect the total number of lines delivered and their value. There are a number of different ways to deliver items on this screen. Any or all can be used in combination.

By Typing

Search the list for each of the delivered lines either by scrolling through and identifying the lines. Or by typing the first few letters of the name in the highlight bar jumps down to the matching lines.

When highlighted click the **Quantity** button and type in the amount received. This might not match the number ordered, as this line may have been included on more than one order.

By Tagging/Multi-Selecting

A number of lines can be selected and accepted all at once by multi-selecting them. When the selection is complete (and this can be done in stages) click the **Rcv All** button and click **Yes** to confirm that you wish to deliver them. The received quantity of those lines is now set to the expected quantity, which was the total number on order.

If only one line is highlighted when the **Rcv All** button is clicked, the entire contents of the consolidated order is marked as fully satisfied.

By Scanning

Scan one of each of the items which has been delivered. Analyst will search through the list, find the matching line and display the quantity dialogue to type in the number received.

If Analyst can't find an exact match but does find a similar item (one in the same drug family) the opportunity to substitute the lines will be provided.

If no match is found the item will be added as Unordered Goods.

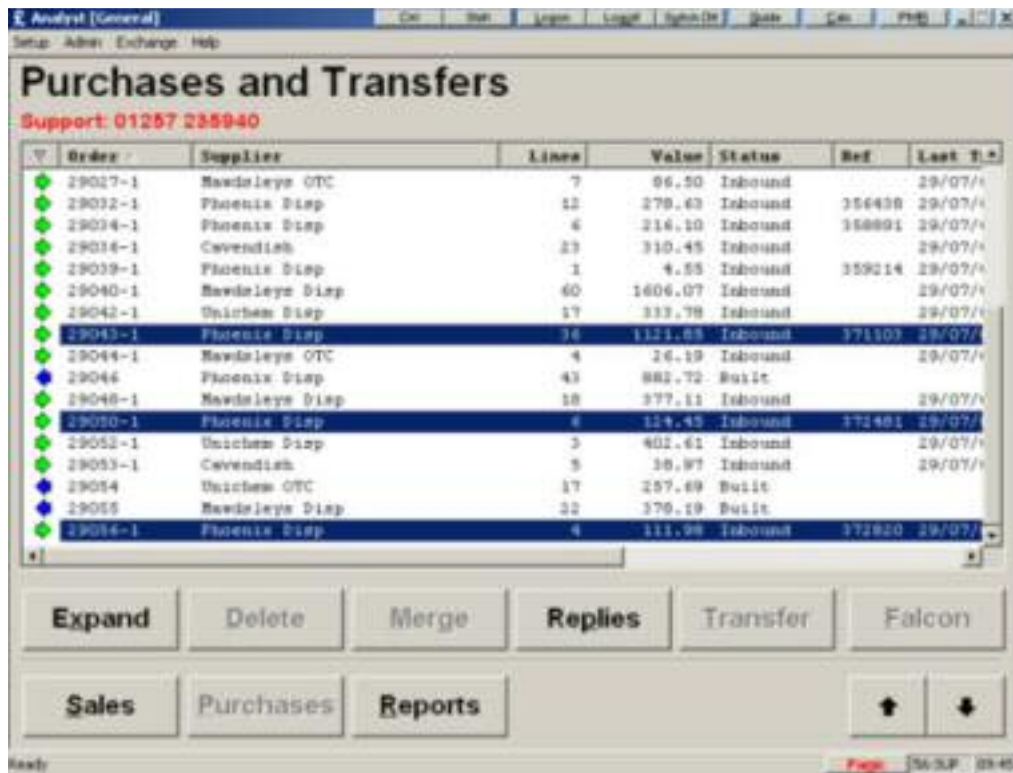
Accepting the Delivery

When all the lines in this delivery have been entered, by whichever method, click on the **Accept** button. This will update the stock of the delivered lines and satisfy the oldest orders for those lines. The supplier summary is displayed again.

Consolidating Selected Orders

The Consolidated orders option will combine all outstanding orders for suppliers. If preferred, two or more orders for the same supplier can be selected to be opened.

Use the CTRL button to multi-select the orders to open. They must all be inbound for the same supplier.











Click **Expand** to consolidate the selected orders and view them all on one screen.

Note that when orders are consolidated the received quantity is set to zero. When an order is opened individually the received quantity is set to the expected quantity.







Analyst PoS Icons

Icons you will see whilst using Analyst PoS are listed below. Note that some icons are re-used. Make sure you are looking in the correct section to find out what they mean.



Previous Sales

	Completed sale
	Void sale
	Layaway sale
	Account pay-in
	Sale in progress on another terminal or empty completed sale
	Pay-out from cash drawer
	Private Script performed on PMR system
	A Sale Alert has been triggered

Search Results

	Product counted and in stock
	Product counted and not in stock
	Product has not been counted
	Specifics are being tracked on this product and it is in stock
	Specifics are being tracked on this product and it is not in stock
	Product never been sold, ordered or counted

Product Editor - Selling Tab

	Product is pre-packaged (default)
	Loose weight product, weighed on scales

Product Editor - Buying Tab

	Singles order code
	Case order code
	Order code suspended
	Order code discontinued

Backups

Database backups are an important part of any business's daily routine. The IT systems in your shop can too easily be taken for granted, but if something goes wrong you soon learn how much you have come to rely on them.

Despite everyone's best efforts computer systems sometimes do go wrong or can be the subject of a larger catastrophe such as a fire, flood or similar. By taking regular backups the longer term disruption is minimised by helping to get your system back up and running again quickly.

By default Analyst uses the incredibly secure AES-256 standard of encryption to prevent anyone viewing the data on a backup disk or pen drive. In addition, each backup is tied to the system from which it came and no other system can restore the backup to be a live database.

Performing a Backup

Analyst can backup either backup the a live database or the NTX File. To backup the live database is preferred, but this requires Analyst to be closed on all terminals for the duration of the backup. Backing up the NTX file can be done when the system in use, but can affect the performance of the system for the duration of the backup. In either case it would be best for the shop to be quite quiet or ideally closed. The type of backup is selected in the System Configuration in the Miscellaneous section of the Options Tab with the option "Backup network transmission file, not live database".

If performing a live database backup close Analyst PoS, PMR and Main Office on all terminals in the system except the one performing the backup and select **Admin** and **Backup Databases**. For the NTX backup, just select the **Admin** and **Backup Databases** options.

The backup screen will appear and you will be asked to insert a disk into the backup drive.



Insert the disk and click **OK**. The progress bars will start to move as the backup commences.



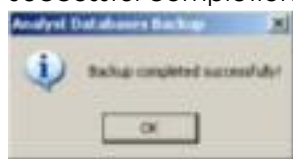
The top bar represents the progress of the complete backup procedure, the bottom left bar the progress of the file and the bottom right space used on the disk. If the disk becomes full before the backup has completed, more disks will be requested. If this becomes necessary the following box will appear.



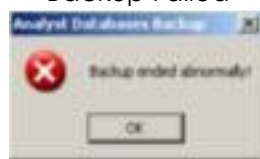
Remove disk 1, insert a different disk and click **OK**. Once the subsequent disks have been filled disk 1 will need to be re-inserted. This then writes how many disks have been used for the backup procedure. If more than 3 disks are being used to backup or it is taking more than 15 minutes you may need to archive some data or might be using the wrong type of disk. In either case call the CareDesk for assistance.

When complete one of two messages will appear:

Successful completion



Backup Failed



Always press the **OK** button before removing any disks or investigating the cause of the error.

Working at Home

For users who take a copy of the home the system at home will need to know which system it is a part of to allow the restoration of a backup from the shop. This is done by exporting the encryption key from the shop and installing it on the home system. This is a one-off procedure.

From the Admin menu select Encryption keys. If there is more than one key select the key with the highest number, as this one will be used by Analyst to encrypt the data. Click on the **Export** button to copy the key to the backup drive. Ideally use a separate disk or pen drive to store the backup data and encryption key.

Take both disks home and launch Analyst on the home system. Again, from the Admin menu select the Encryption keys option. This time click on the **Import** button and insert the backup disk into the drive. Once the key has been imported the backup can be restored as normal.

Rotating Backup Disks

More than one set of disk should be used to backup your system. If the same set is continually used the chances of damage to the disk are greatly increased and in the event of the backup being restored it will only ever be the most recent. If there are any problems with either the disk or the data our options have ended.

What we suggest are using 3 sets of daily disks using the oldest set each day. This provides three days of backups in the event of any problems with the disks or data. Also three rotating month end disks should be used, again, using the oldest at each month.

In addition an archived year end disk should be taken. Yearly and monthly disks should be new disks each time with the daily disks being changed regularly.

If your system requires more than one disk to backup, never re-use the same 'disk 2' between days. Each day must use it's own complete set regardless of how many disks it takes.

Most importantly: all backup disks should be taken away from the shop. If catastrophe should befall the shop, make sure your backup disks are safe in another place.

Restoring a Backup

Restoring backups should only be done with the assistance of the CareDesk as the restored backup will overwrite the existing database on the system.

To restore a backup close Analyst on all terminals except the terminal you are working on and select **Admin** and **Restore Databases**.

A password is required to perform this procedure. Call the CareDesk and quote the code displayed on the password screen. Do not dismiss this screen whilst you call, the password given will only work with the code displayed and this changes each time the screen is launched. A confirmation box follows to provide the opportunity to back out of the operation.



Insert the disks as directed. The progress bars will appear to show the restoration.



Insert all the disks in the backup set as directed. When completed, one of the following messages will be displayed.



If successful, the database will have been restored and be in place on the system. If an error occurred the old database will not be replaced and the CareDesk should be contacted to investigate the error.

Support

The CareDesk is open from 8:30am to 6:30pm Monday to Friday and 9am to 5pm on Saturday and can be called on 01257 235940 with any problems you may have with your Analyst system or with any queries you may have that cannot be satisfied by this guide.

Telephone

You will get straight through to one of our CareDesk Advisors rather than an automated system or any intermediary. Try to be near the terminal with the problem as they will endeavour to remedy the fault over the telephone. If your problem is not urgent in nature you might prefer to call midweek or in the afternoon, as mornings, particularly Mondays tend to produce a higher than average volume of calls.

Remote Control

The CareDesk have the facility to remotely control your system with your permission and may be able to fix the problem that way. They will need your help over the phone to put the system into a ready state for remote control. They can connect through to any terminal on the system if required.

Diagnostic Backups

If the problem you have is of a data nature and requires further investigation by the CareDesk or Development teams a copy of your data can be securely sent through the internet to the PSL servers where it can be examined more closely. The system must be connected through a broadband internet connection for this to work and can only be initiated with your consent.

To send a diagnostic backup click on **Admin** on the management/PoS section and select **Send diagnostic backup**.



This displays the date and time of the backup which will be sent. Make sure that the problems you are experiencing will be contained in a database made at that time and click **OK** to confirm that you're happy for PSL to receive your data. The transfer can take several hours but is in the less often used 'upload' bandwidth of your connection. But during this time you may find your connection a little sluggish.

Peripheral Swap-outs

If a peripheral like a scanner or printer develops a fault which cannot be fixed we will usually send a replacement on a next-day carrier to your shop for you to swap yourself. We ask that you re-pack the faulty part in the packaging ready for us to collect. We have it shipped back to our workshop so we can assess the fault and fix it or responsibly dispose of it. You may need to lift the till or computer to access the ports where the peripherals plug in. If you are unsure about this give the CareDesk a call when you receive your replacement part and they will talk you through it. Or if you are very nervous about doing so we can arrange our engineer to swap it for you, but we can only call them when your part arrives on-site so this will probably take longer.

Engineers

If the problem is hardware in nature and cannot be remedied remotely your local engineer will be called to attend as soon as possible. Our engineers are all employed exclusively by Positive Solutions and try and arrive on-site within 8 working hours of the fault being reported to them by the CareDesk.

Email

Non-urgent requests or comments can be emailed directly to the CareDesk at support@positive-solutions.co.uk. Please be sure to include your pharmacy name and address in any correspondence. Alternatively your email editor can be launched from within Analyst by clicking **Help** and **Email PSL support...** This method will place your account number and details in the subject line for you, but it will only work on terminals with an email client (Outlook or similar) already installed on it.

Web

The web site at www.positive-solutions.co.uk contains printable portions of this guide to download and email forms for contacting the CareDesk and Sales.

A forum is also available to post questions or comments of a non-urgent nature and to engage other users in a discussion about particular topics. The address for the forums is: www.psl.tsohost.co.uk/forums/index.php or from the main website click on Support then Forum.

Post

Not normally used for support, but correspondence can be sent to:

Positive Solutions Ltd.
Solutions House
Chorley Business & Technology Centre
East Terrace
Chorley
PR7 6TE

To ensure it reaches the correct person address it to:

Martin Jones	Sales
Priscilla Burley	Accounts
Brian Parry	CareDesk
Bill Ennis	Complaints

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