



Administration

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Chromis Administration

Document Version History

Version No.	Date	Author(s)	Comments
1.00	01/03/2021	John Lewis	Initial release.
1.20	10/07/2021	John Lewis	Updated to current release.
1.2.3	16/08/2021	John Lewis	Update Roles with report selection. Reporting chapter added.
1.2.4	08/09/2021	John Lewis	Updated Systemconfig details
1.4.0	11/05/2021	John Lewis	Initial RC Version
1.4.5	03/01/2022	John Lewis	Minor wording changes

Software Version History

Version No.	Comments
1.00	Initial release.
1.20 beta 212901	Updated with bug fixes and new features.
1.2.3 beta 213404	Bug fixes and reporting added.
1.2.4 beta 213704	Bug fixes, tax details in POS and tax report
1.4.0	Initial RC version
1.4.5	Moved to RC to full release status

Changes to the manual will be completed upon major changes in the software, minor changes may not result in a new manual release.

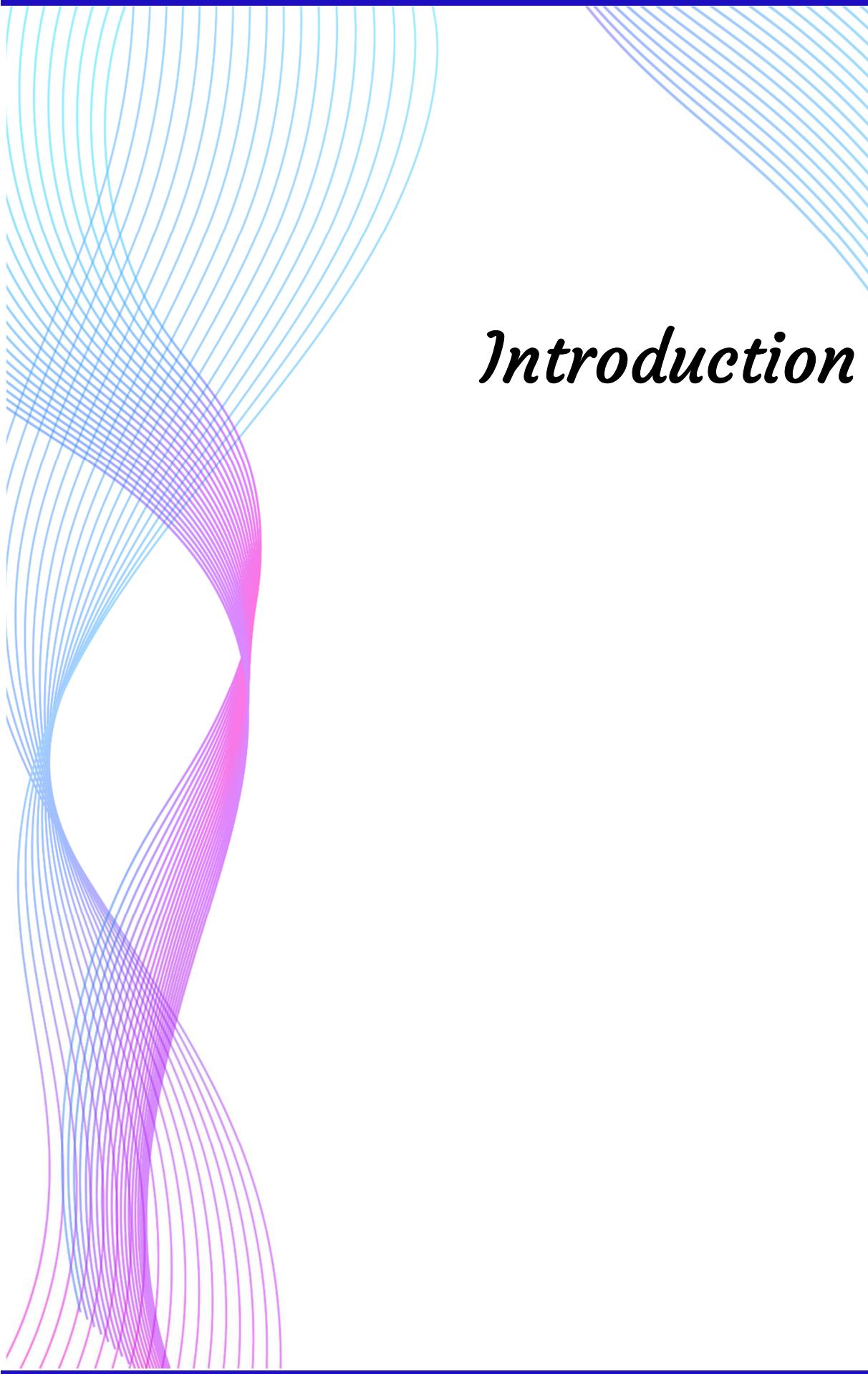
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Introduction

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Overview

The goal of any retail management software is to help you focus on your sales and your customers. It is this goal that is the driving force behind Chromis.

Chromis Pos is designed to be a feature rich Point of Sale (POS) system, which can run a large variety of hardware. The overall concept is that the core system can be configured by the user, allowing functions to be enabled if required.

Background

Since 2013 work has been done on the project, firstly with new features and significant changes to an open source POS. Most of these changes were born to assist a small shop implementing a solution that was fit for purpose, and responding to requests of other users.

It was the nature of these changes and the ability to control its own destiny that Chromis was started. The first release of Chromis was in 2015, since which it has undergone a significant metamorphosis. There is a strategic plan to continue the development of the product, and offer a richer platform for the user.

At the time of writing Chromis does not include any Credit\Debit card integration due to PCI regulations, it is intended to investigate these at a later date.

Hardware and software prerequisites

Hardware

Chromis is designed to run on hardware which is capable of running Java\OpenJDK. The better the hardware the better the performance, it has been run on the later raspberry Pi's.

- Intel or equivalent processor
- 300 meg free disk space for JRE version, 200 meg pre-installed Java
- 1024 x 768 minimum resolution (Point of Sale)
- Administration is designed to run on device with other than the POS ideally a networked PC
- Receipt printer (optional)
- Report printer (optional)
- Cash drawer (optional)
- Scanner (optional)
- Magnetic swipe reader (optional not for credit cards)
- RFID reader (optional if implementing the use of these)

However, consideration should be given to the database server that will be used. If it is intended that the database will reside on the same hardware, ensure that your selection is able to meet its requirements.

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Software

The following software is required to run Chromis. (All versions are correct at the time of writing)

- A supported operating system (Windows & Linux)
- A database (local or remote Mariadb 10.6 or Mysql 8.0.23)
- Java 11, this is the latest version that offers LTS (long term support at the time of writing)

Chromis is available in 2 versions, with or without a Java runtime environment included. We recommend that you use the JRE included version, this will ensure that you are using a version that has been proven to work with Chromis and negates the need to pre-install Java.

Chromis has been tested with the following OpenJDK platforms (all Java 11.0.11), with limited testing.

- BellSoft Liberica
- Microsoft JDK
- Amazon Corretto
- Zulu
- AdoptOpen JDk (hotspot)
- AdoptOpenJDk (Open9)

Oracle's Java has been excluded from the testing due to the licensing changes and any usage that is not development must be paid for.

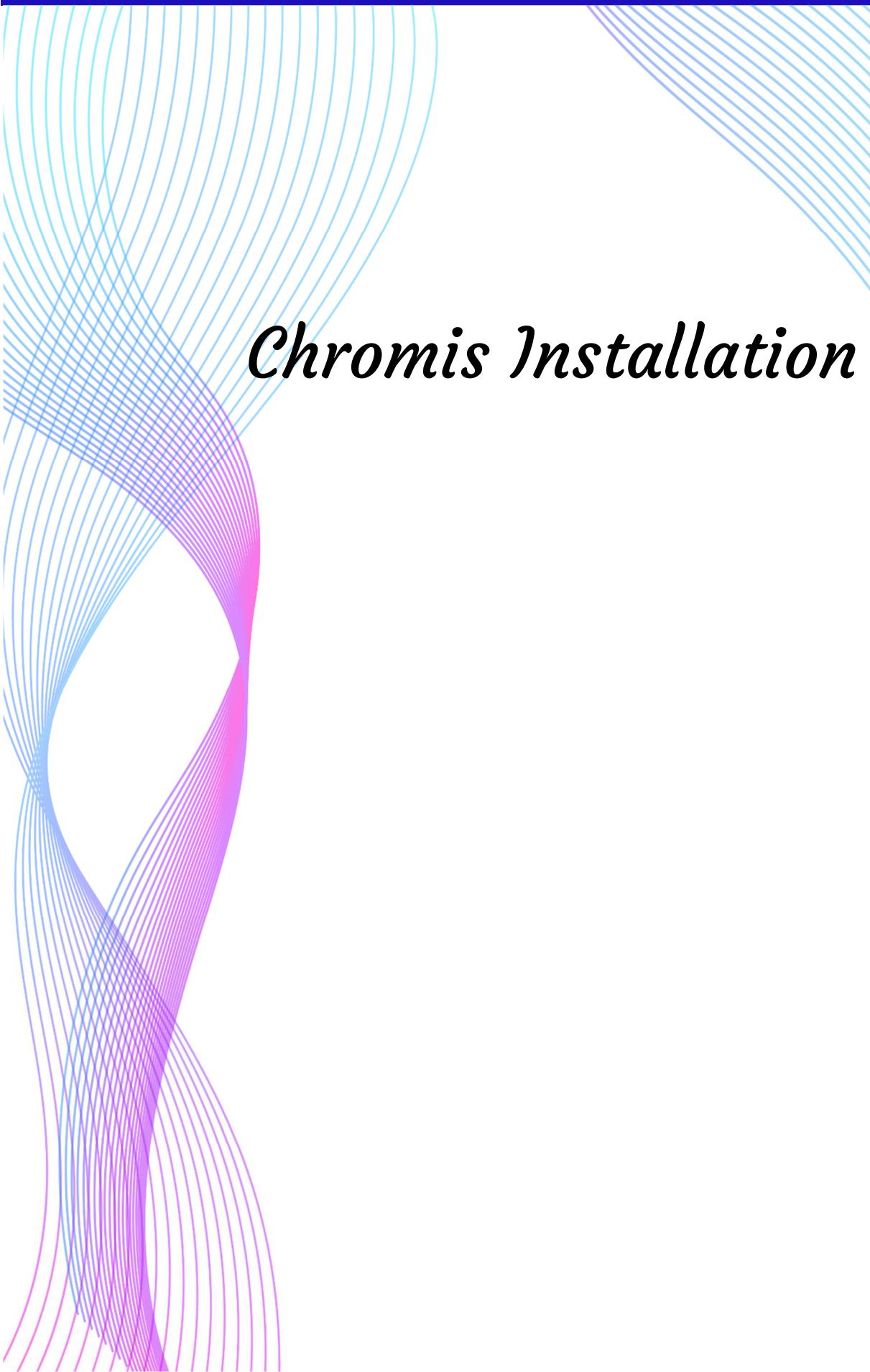
The development platform currently consists of

- Windows 10
- BellSoft Liberica JDK Full 11.0.11
- JavaFX-SDK 15.0.1
- Netbeans 12.3
- MySQL 8.0.23
- MariaDb
- SceneBuilder
- JasperReports

Testing is completed against other environments, for Linux testing we currently use Linux Mint as a base.

Chromis is currently designed to run exclusively using MySQL database, this may change at a later date.

It is also import to note that upgrading to Version 1.0 and above from a lower version is not possible, this due the large amount of database changes from the earlier versions.



Chromis Installation

Chromis Administration

Refer to the SQL documentation to install the SQL platform if required.

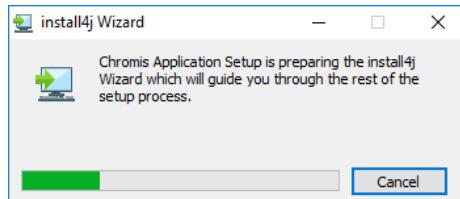
If the underlying platform is now ready, the next stage is to install the Chromis suite of applications, which consists of the follow

- Chromis database creator
- Chromis Setup
- Chromis Administration
- Chromis POS

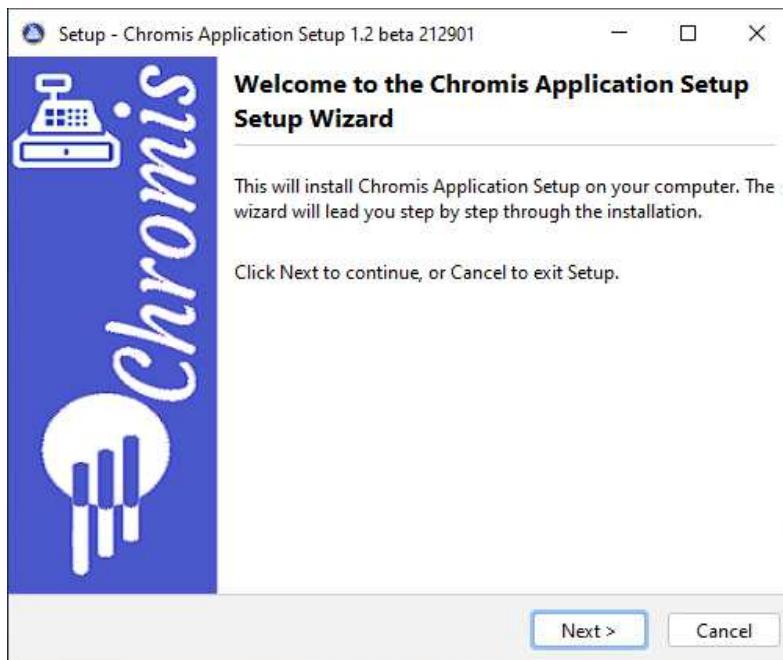
Chromis Setup

Chromis setup is the part of the suite, which is used to create the database and config certain elements of the POS. It is only required when the database is first created or changes are required to the POS.

Locate and execute 'ChromisPOS_windows-x64_xxxxxx', where xxxx relates to the version of the application.

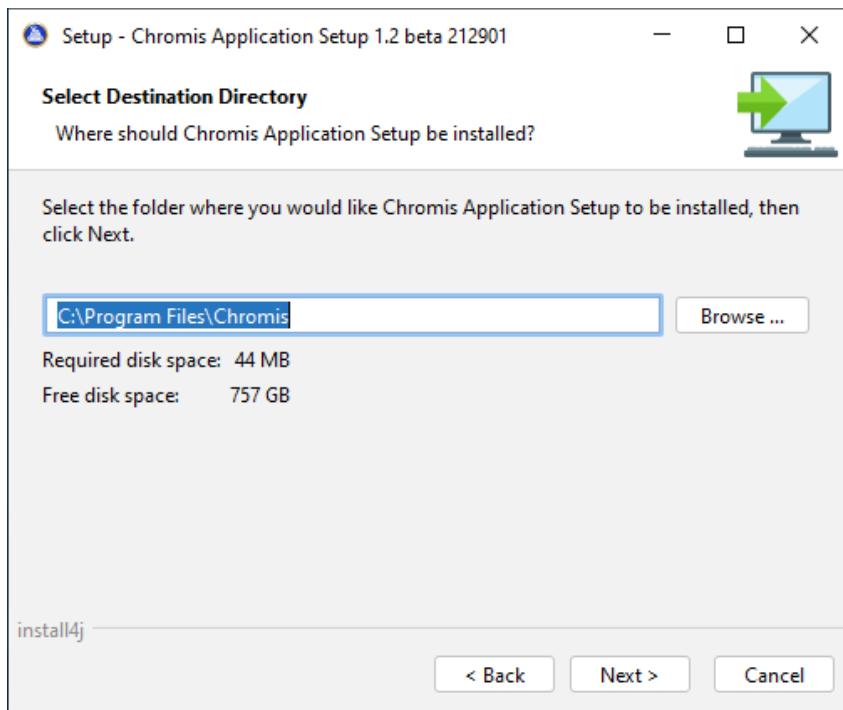


The install wizard will start the process.



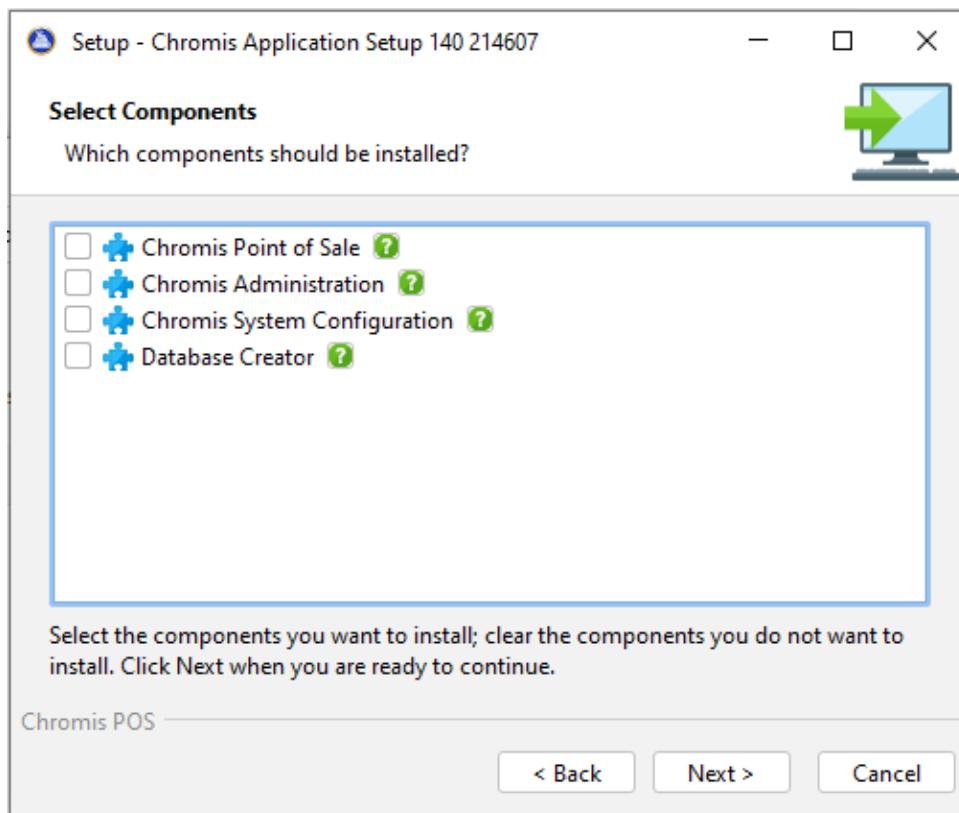
Click 'Next'.

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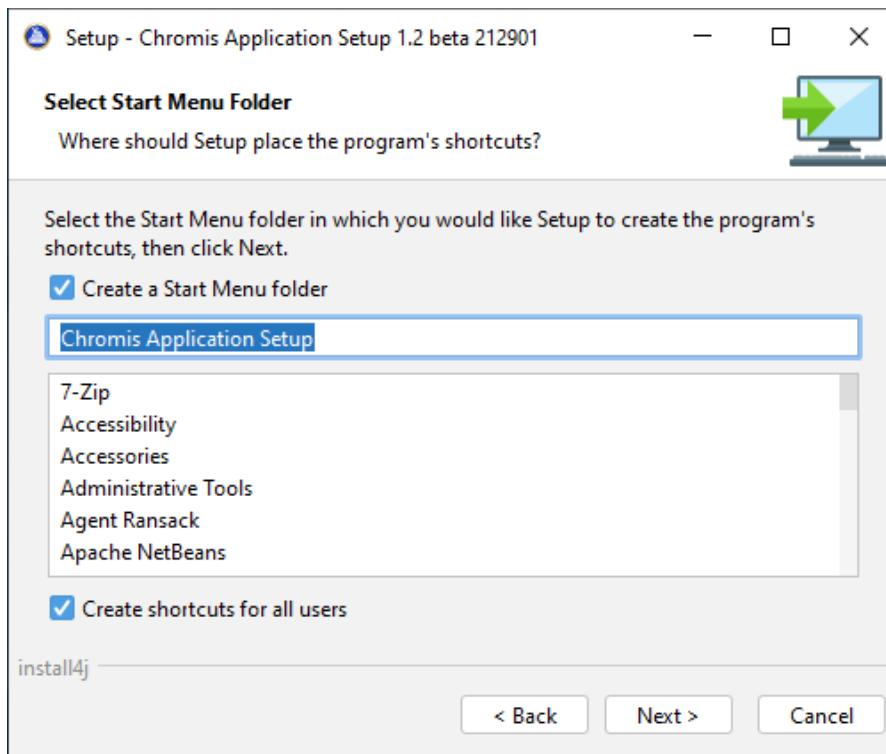
At this point you can change the default installation folder, it is recommended that you leave it as it is.

Click 'Next'



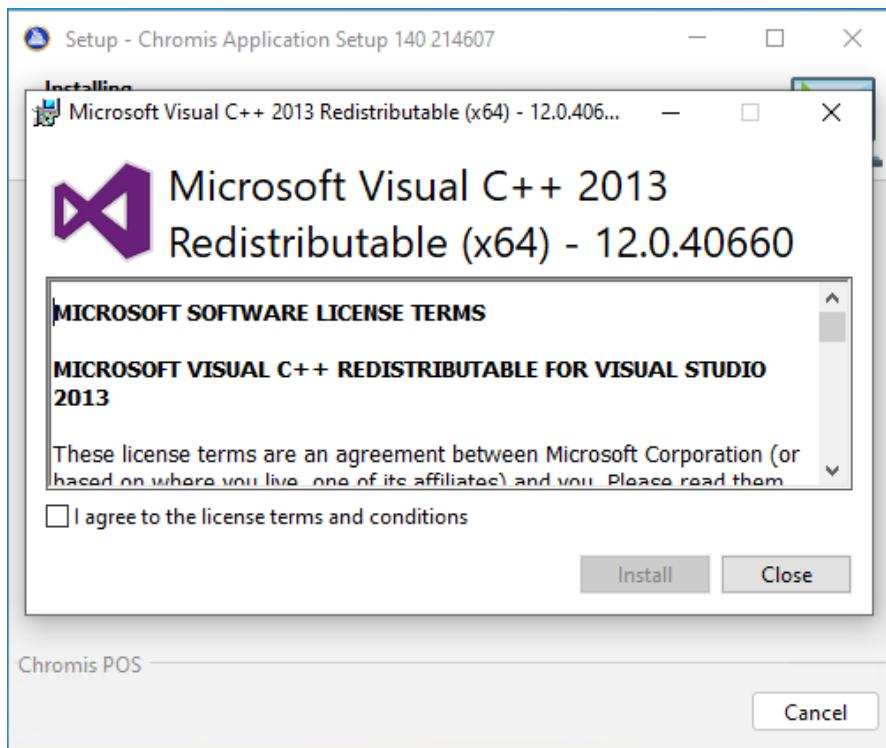
Chromis Administration

Select the elements that you wish to install and click next.



Select a start menu folder or leave as it is.

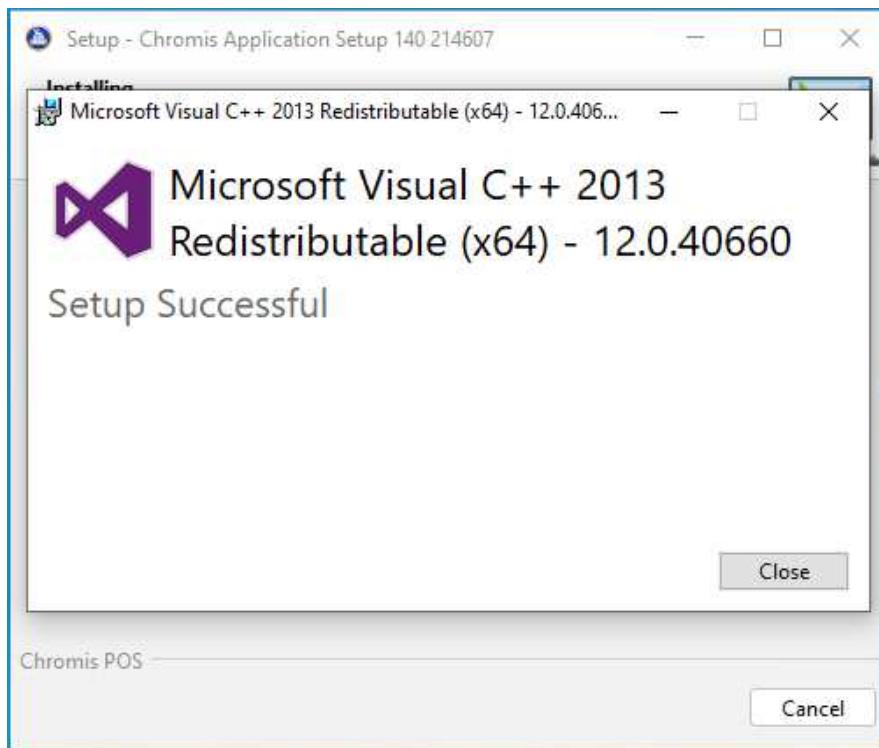
Allow the software to install.



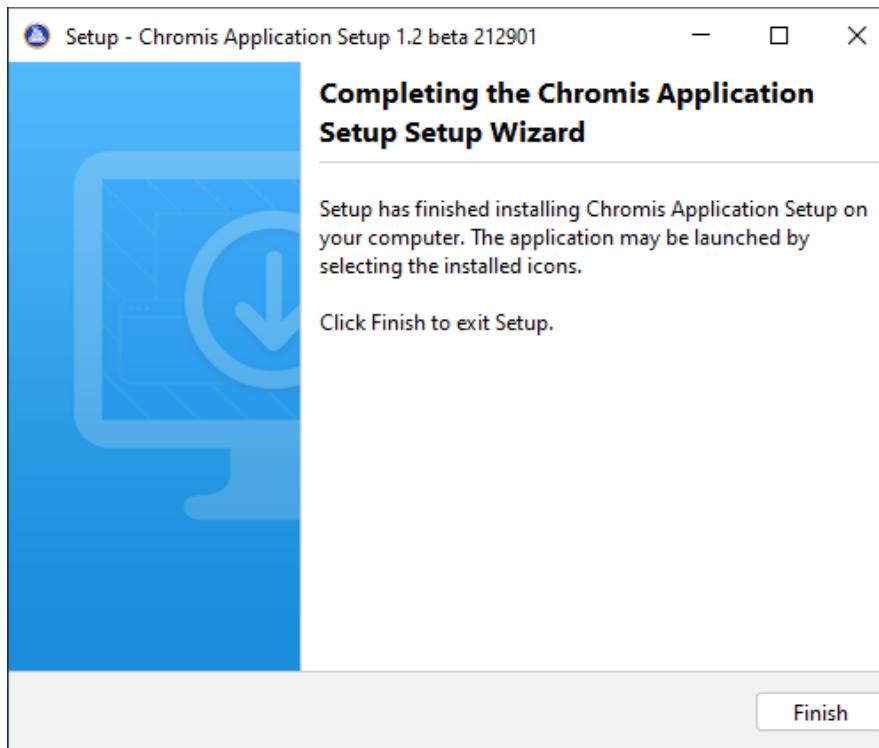
To use the backup option in administration, you will need to install the C++ runtime.

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'Agree to the license' and click 'Install'

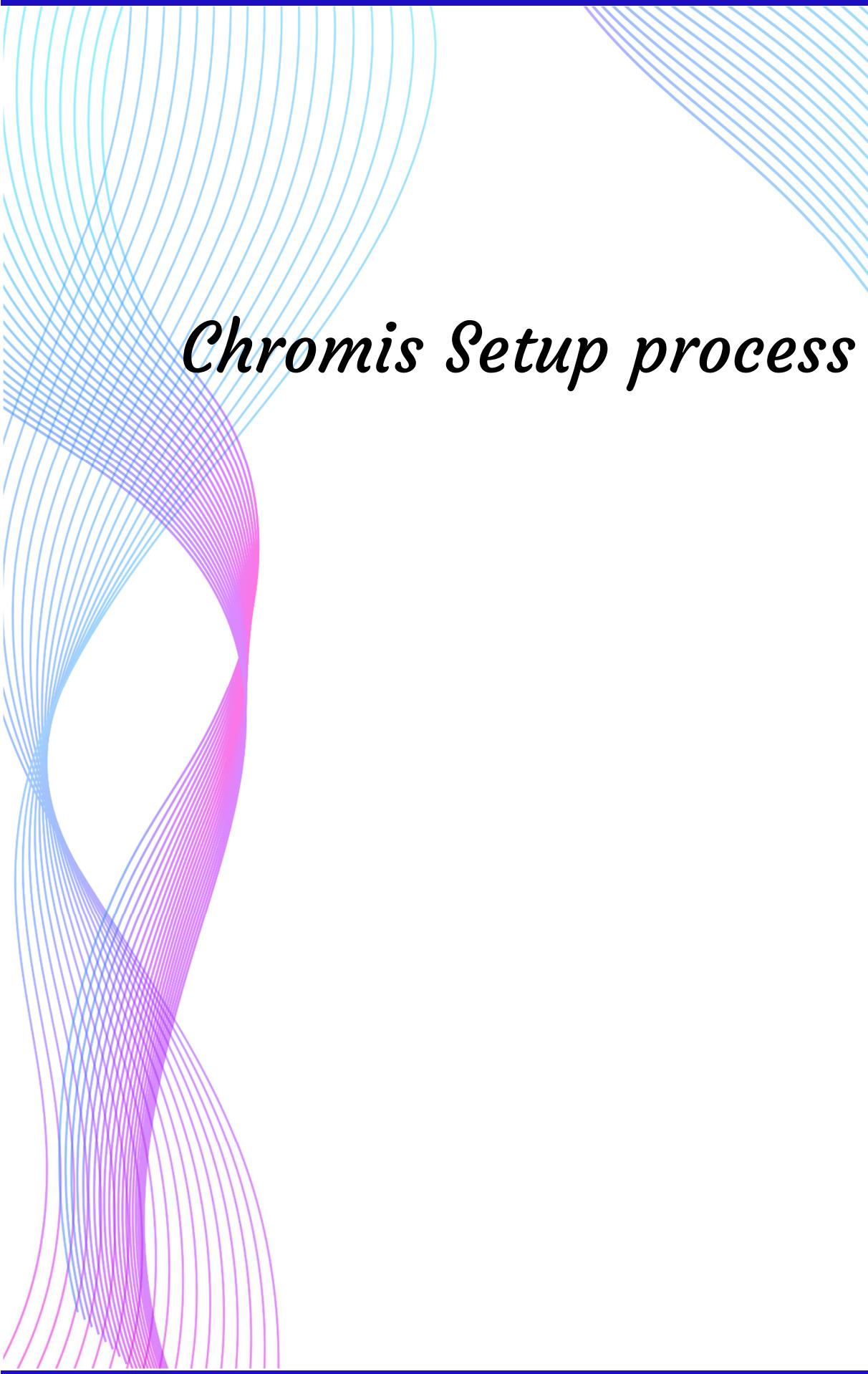


Once complete click 'Close'.



Once completed click finish.

Now that the application is installed, we can move on to the next steps.



Chromis Setup process

Chromis Administration

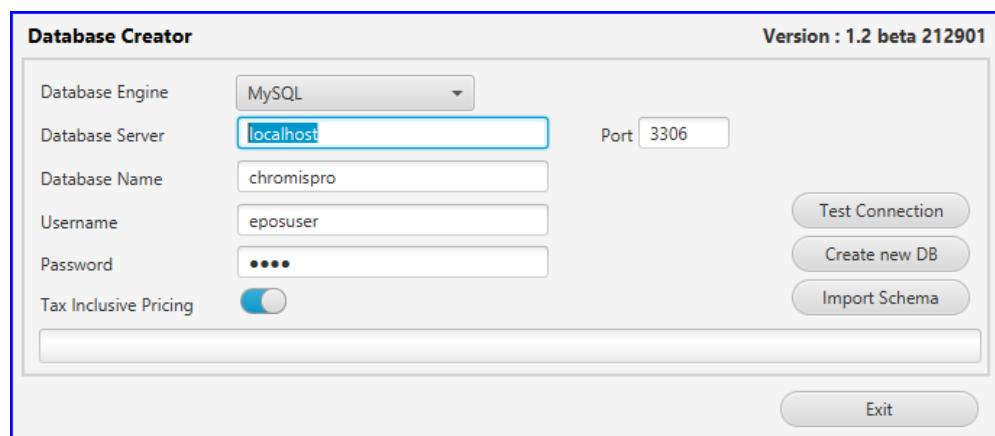
The first step is to create the Chromis database if it does not exist. Locate ‘Chromis Database Creator’, this is not created as a desktop icon so must be accessed from the menu.



All applications will show the default Chromis splash screen.



Database Configuration



1. Set ‘Database Server’ to location of database, that was installed earlier.
2. Set the name you wish to use for the database.
3. Set the username to that you set up during the database installation. 5
4. Set the password.

Now you need to decide how Chromis will operate, (once this set it can be untidy to change).

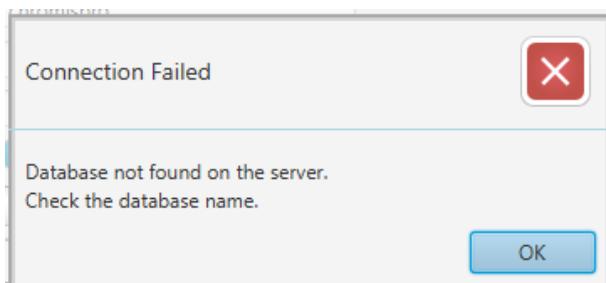
Chromis Administration

Chromis POS will operate in one of two modes, Tax inclusive pricing or Tax exclusive. The difference is how the system handles sales.

Tax inclusive means that the Taxes are calculated on a line-by-line basis, while Tax exclusive calculates the Tax elements on completion of the sale. For standard retail I would recommend Tax inclusive pricing, unless your country requirements are to operate tax calculation at the point of calculating total amount.

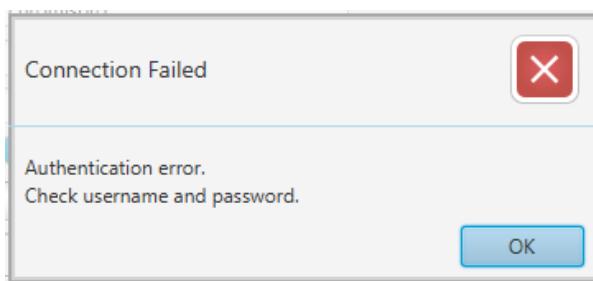
You can test the connection to the database server, by click 'Test Connection'

If this is a new install the message is most likely that shown below

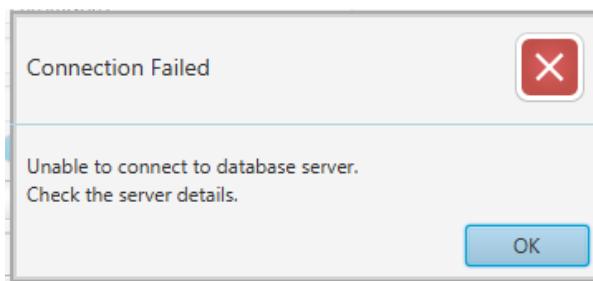


This indicates the application was able to connect to the database server.

Other messages might be

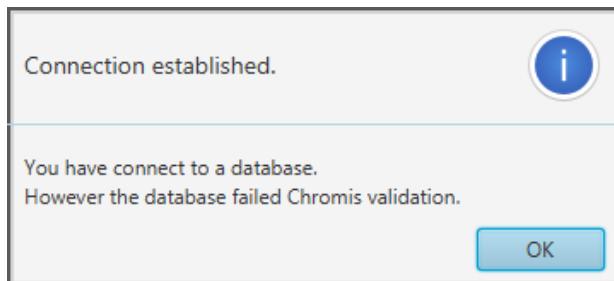


Indicating that there was an issue with either the username or password

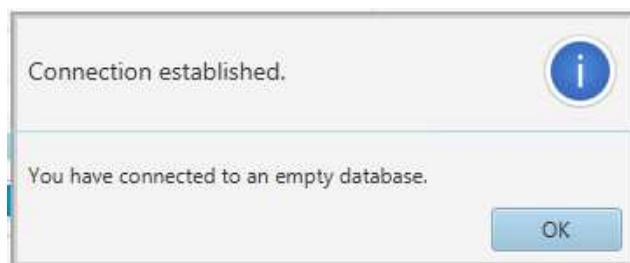


Indicating that it could not locate the server, this can be caused by incorrect values, MySQL configuration or firewall settings.

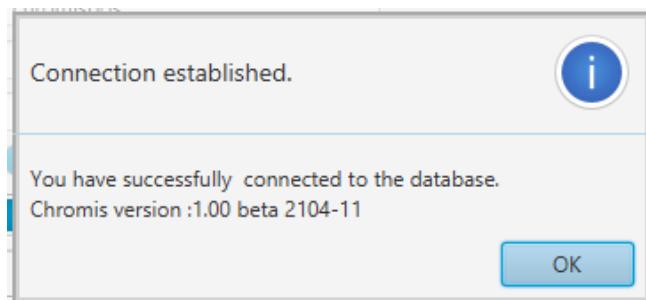
Chromis Administration



Indicates a database with name supplied was found, but could not be confirmed as being a Chromis database.



Indicates it found an empty database on the server that you specified.



Indicated you found Chromis database on the server and its version.

What you really want at this stage is an empty database or no database present on the server.

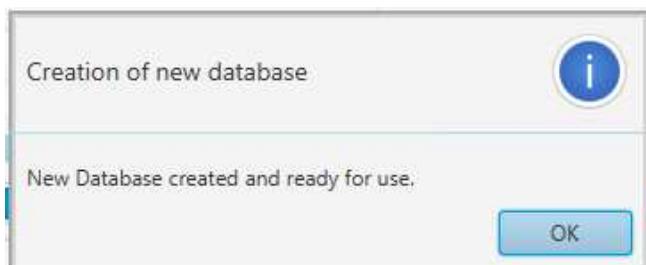
If you have an empty database and wish to use it, select 'Import Schema', this will populate the database with the correct tables etc.

If there is no database on the server and the user has the correct privilege's, click 'Create new DB'.

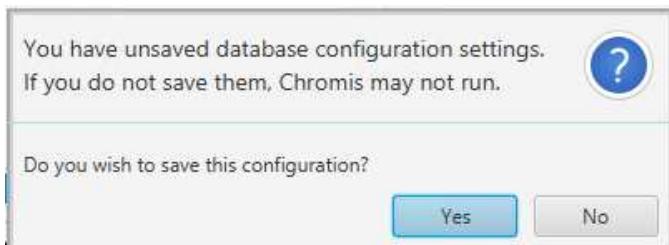
It is during these processes that 'Event' and 'Super' privileges are needed, the MySQL event scheduler needs to be enabled and a process created as part of the process.

You will be informed if the process failed or completed.

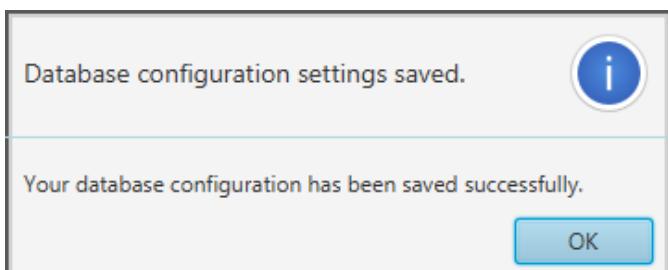
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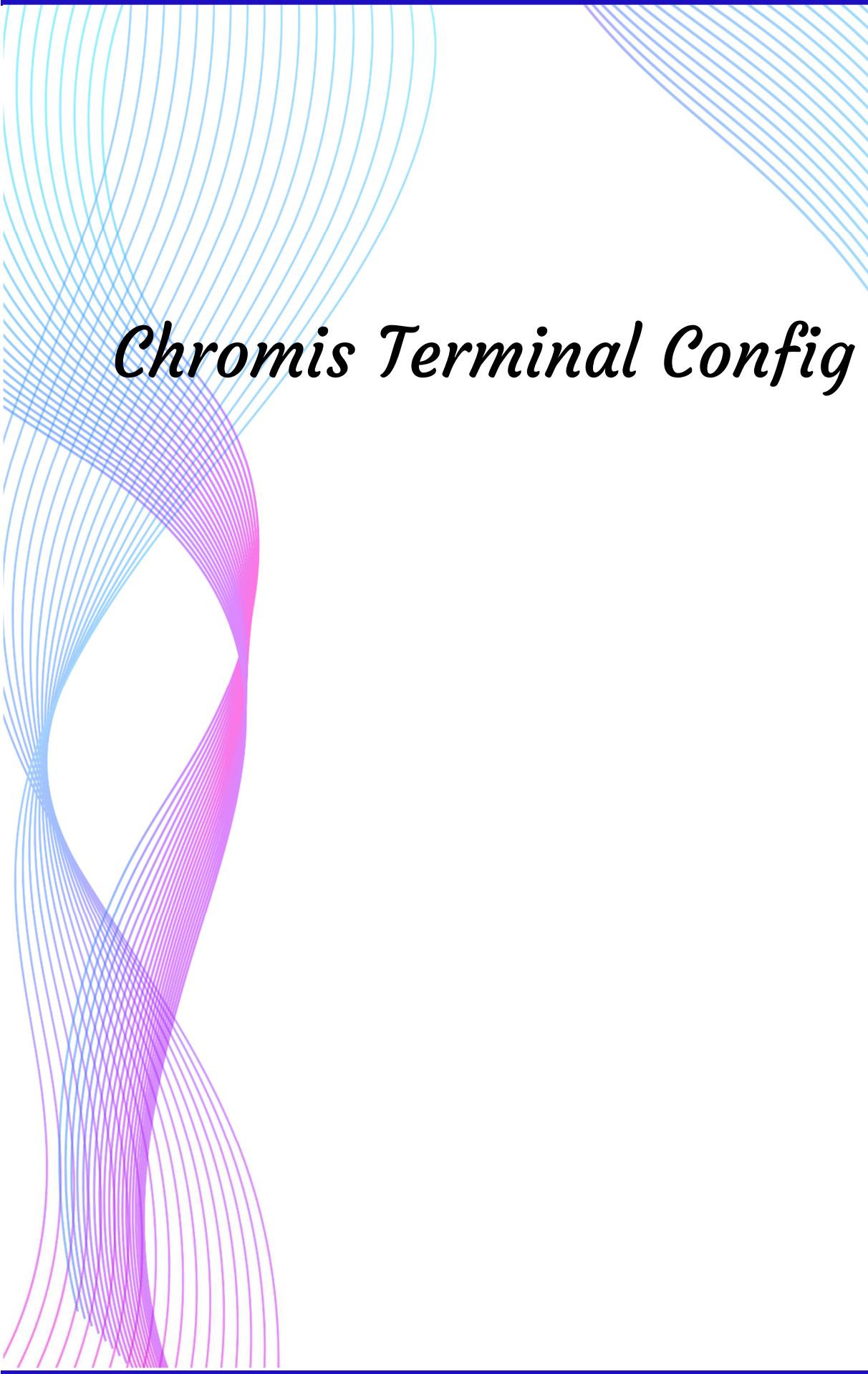
At this point you will need to close the setup and asked what you wish to do.



If the user details are those that will be used by main POS application, you can click 'Yes' otherwise 'No'. You will need to open setup again and change to the correct setting, ensure you can connect to the database and then save the configuration.



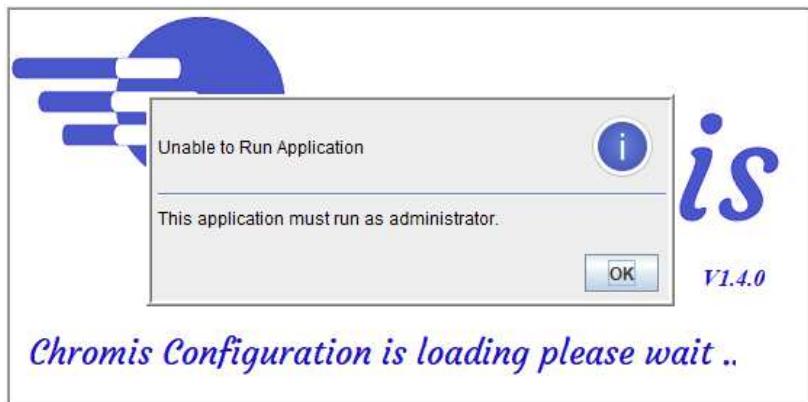
You will now have default database created and the properties file will point to this.



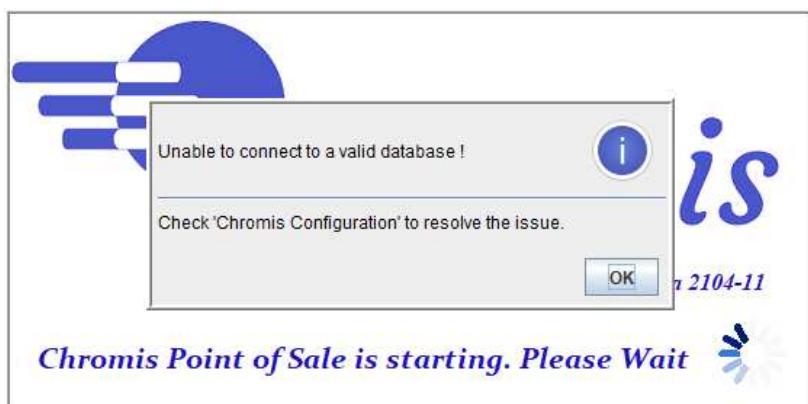
Chromis Terminal Config

Chromis Administration

Running ChromisTerminal.exe is used when a new till is to be added to the system. This application must be run with administrator rights.



If during the start of the application you get the following



It indicates that there is no configuration file or a parameter in the file is incorrect. (do not panic).

A screenshot of the 'Chromis POS Terminal Configuration' dialog box. The top section, 'Database Engine', is set to MySQL. The 'Database Server' field contains 'localhost', 'Port' is set to 3306, and the 'Database Name' is 'chromispro'. The 'Username' is 'eposuser' and the 'Password' is masked as '****'. A 'Test Connection' button is located to the right of the password field. The bottom section, 'Terminal Details', shows 'Terminal Id' as 'POS-01', 'Terminal Type' as 'standard', 'Terminal Location' as 'General', and 'Enable Auto LogOff' is turned off with a timer of 0 seconds. The 'Receipt number prefix' is set to '1'. At the bottom of the dialog are 'Save' and 'Exit' buttons.

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Once you are in the application you can set the parameters and save the configuration, each device must have a copy of the configuration file in order to connect to the system.

Terminal Details

In the previous versions of Chromis the properties file held data that related to the printers connected etc, these details are now stored with the operating system of the machine. (for Windows this in the registry).

These details are only required by the POS units and not the administration element.

Terminal Details	
Terminal Configuration	
Terminal Id	POS01
Terminal Type	standard
Terminal Location	Main Store
Enable Auto LogOff	<input type="checkbox"/> Timer in seconds: 0
Receipt number prefix	<input type="text"/> <input type="text" value="1"/>
<input type="button" value="Save"/> <input type="button" value="Exit"/>	

Terminal Configuration

- Terminal Id is the name by which the till be known to the system as. (Once set this is not easily changed)
- Terminal Type defines the mode that terminal operates in.
- Terminal Location defines the location where the till will be located 'Main Store' is the default and until others are created in the Administration application cannot be changed.
- Enable Auto LogOff allows the terminal auto log off to differ from the main configuration. (this will enable the system configuration and not disable it **(this is not yet working)**).
- Receipt prefix is the prefix applied to any printed ticket.

Terminal Devices Tab.

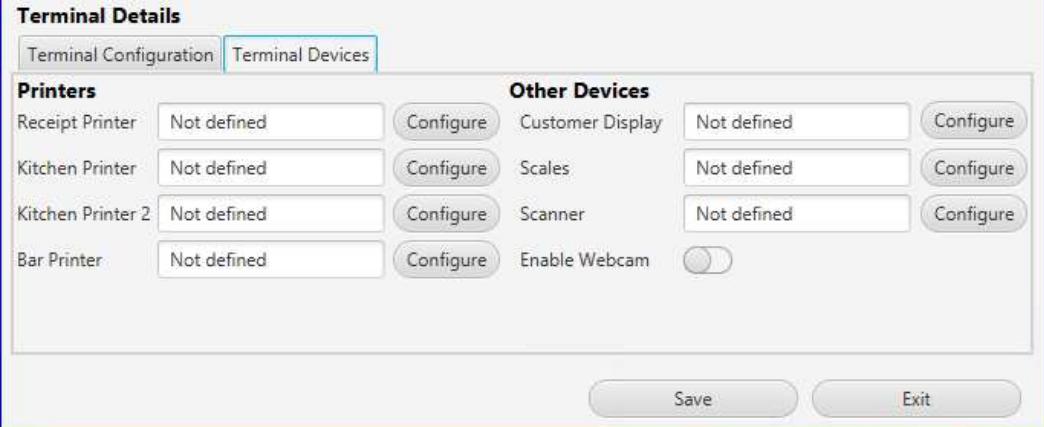
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Terminal Details

Terminal Configuration Terminal Devices

Printers		Other Devices	
Receipt Printer	Not defined	Configure	Customer Display
Kitchen Printer	Not defined	Configure	Scales
Kitchen Printer 2	Not defined	Configure	Scanner
Bar Printer	Not defined	Configure	Enable Webcam <input checked="" type="checkbox"/>

Save Exit

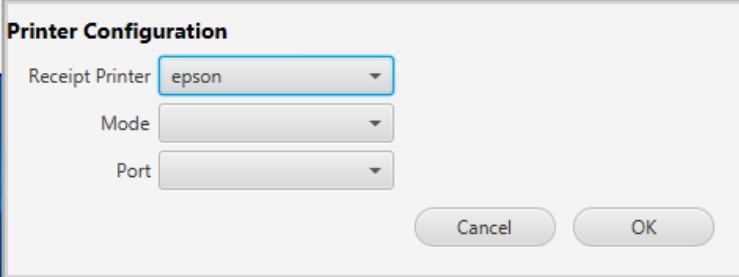


It is in this section that the peripherals are defined for the POS.

Printer Configuration

Receipt Printer: epson
Mode:
Port:

Cancel OK

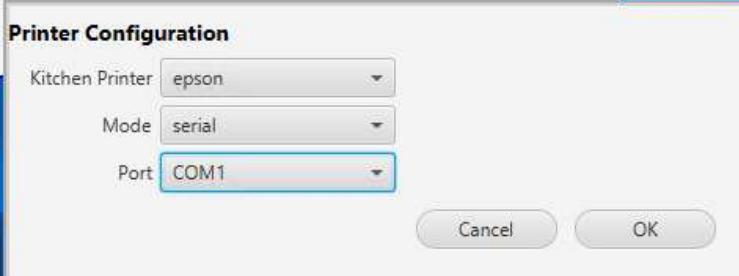


The serial is selected as the mode, it will only display serial ports it finds.

Printer Configuration

Kitchen Printer: epson
Mode: serial
Port: COM1

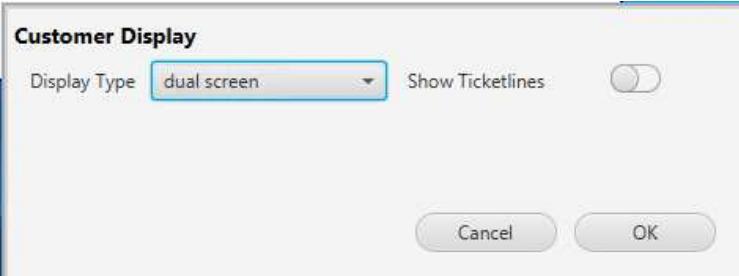
Cancel OK



Customer Display

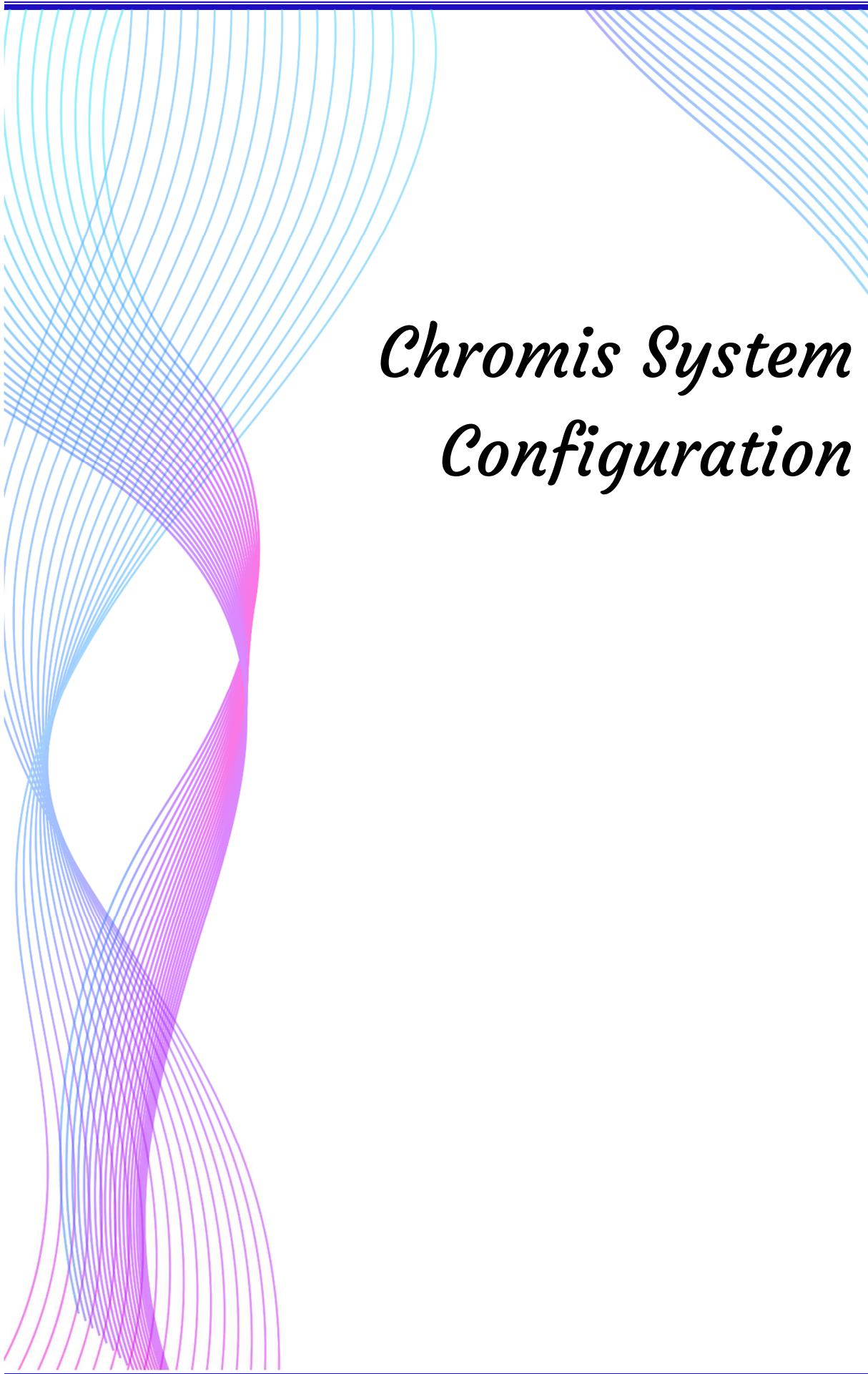
Display Type: dual screen Show Ticketlines

Cancel OK



There is now the ability to use a web camera in parts of the application where it could be used.

Any changes must be saved for them to be applied to the system.

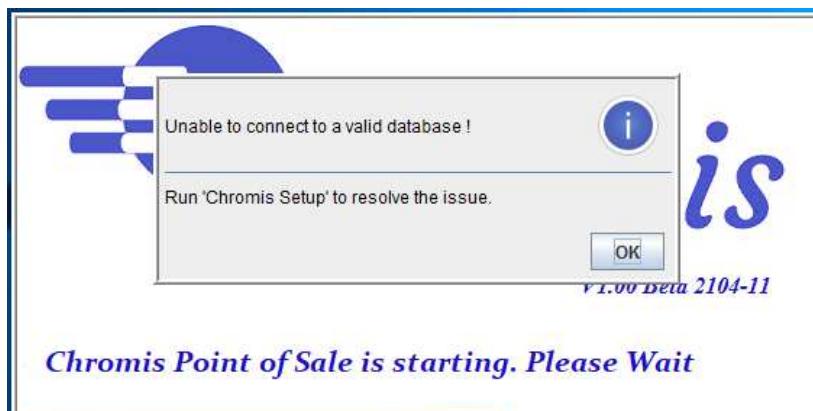


Chromis System Configuration

Chromis Administration

Run ChromisSystem.bat.

This is the final application of this section. If starting the application produces the following screen

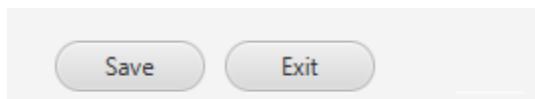


You need to run Chromis POS Terminal Config to resolve the issue before you can proceed.

This section is under review and subject to change and is dependent upon POS changes.

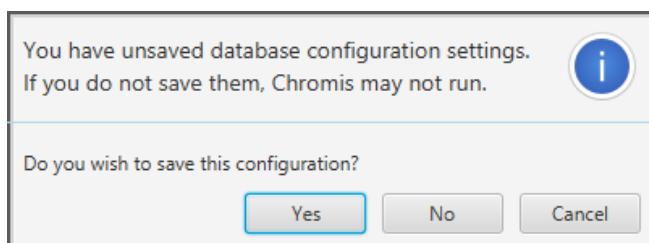
Any changes in this configuration section affects are global and change all of the POS devices attached to the system.

Each of the panels in this application contains the same 2 buttons

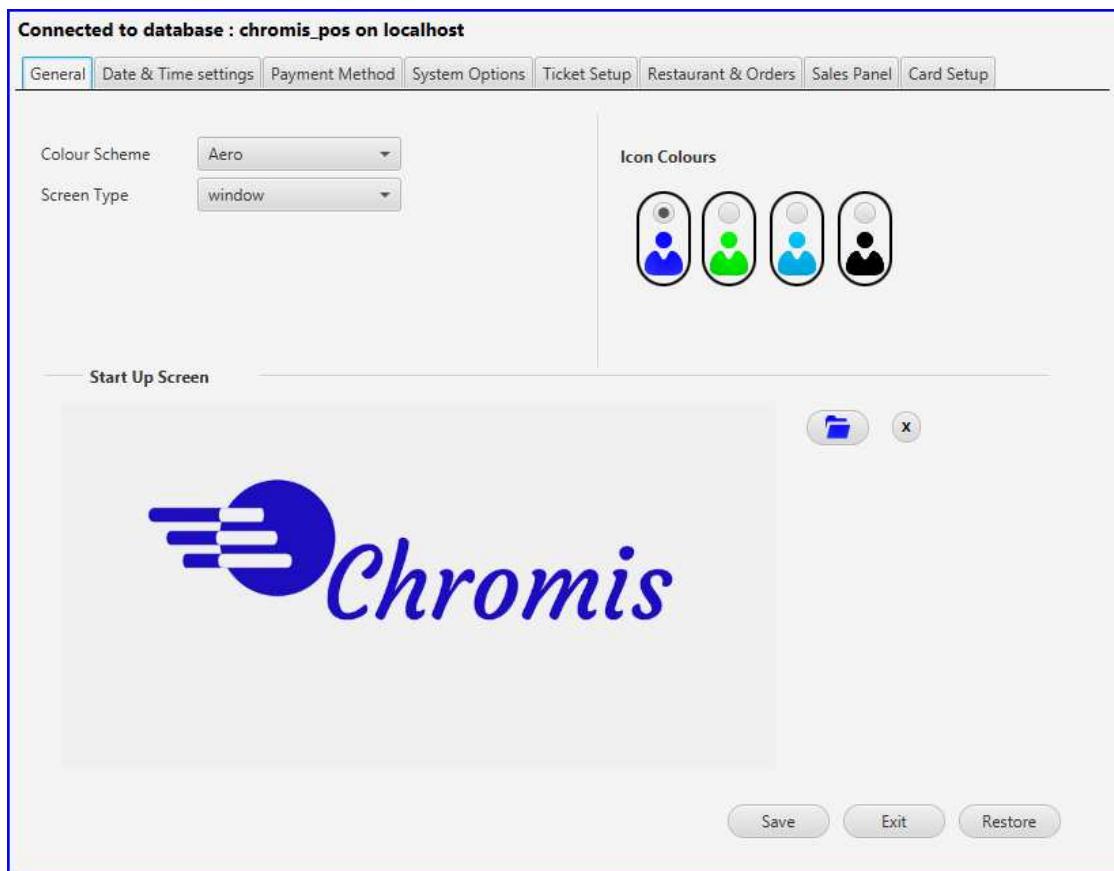


You can save your changes at any time by clicking 'Save'.

If you click 'Exit' and you have unsaved data, you will be asked if you wish to save the changes



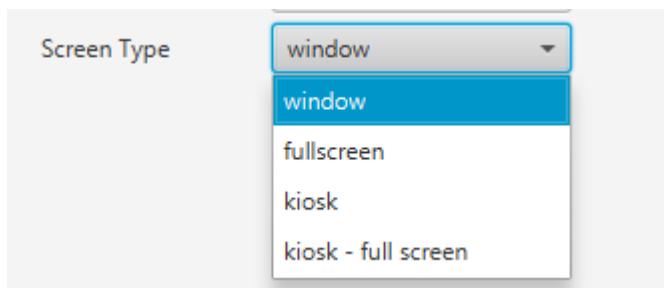
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The first thing to note is that the application indicates the database it is currently connected to.

General Tab

On the general tab, the 'Screen type' can be changed



Kiosk is a mode where the application window is undecorated, meaning it cannot be moved around the screen, minimized or maximized.

You can also change the logo displayed when the POS applications starts.

The colour of the icons on the buttons in the sales screens.

Chromis Administration



There is a recommended maximum size of 700 x 400 for any logo that you wish to use.

Date & Time settings Tab

Connected to database : chromispos on localhost

General	Date & Time settings	Payment Method	System Options	Ticket Setup	Restaurant & Orders	Sales Panel	Card Setup
Time	h:mm:ss	eg	11:18:09				
Date Time	dd-MM-yyyy, H:mm	eg	04-11-2021, 23:18				
Date	dd-MM-yyyy	eg	04-11-2021				
System locale : en_GB							
<input type="button" value="Save"/> <input type="button" value="Exit"/> <input type="button" value="Restore"/>							

The 'Date & Time settings' panel allows you to configure the way date and time elements are displayed in the POS and Administration.

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System locale : en_GB

The panel also shows the system locale language configuration.

Payment Method Tab

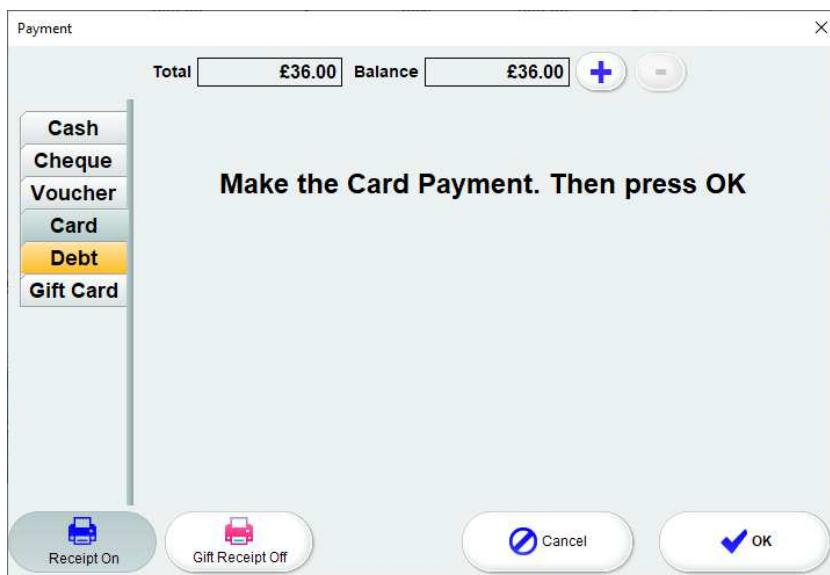
Connected to database : chromis_pos on localhost

General Date & Time settings Payment Method System Options Ticket Setup Restaurant & Orders Sales Panel Card Setup

Mag Card Reader Not defined
Payment Gateway external Test Mode

Save Exit Restore

The payment method panel is intended for future use, it should not be changed. These setting allow you for select 'Card' as a payment method which just displays an information panel.



It is intended that in the future that Chromis will support integrated Card payment devices. Once available these will need to be configured in this screen.

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System Options Tab

Connected to database : chromis_pos on localhost

General Date & Time settings Payment Method System Options Ticket Setup Restaurant & Orders Sales Panel Card Setup

Auto Logoff

Enable Auto LogOff
 Enable Inactivity Timer
 Logoff After Each Sale
 Logoff After Sending To Kitchen

Timer in seconds

In Restaurant Mode - return to tables
 Logoff After Printing

General

Sort categories by order number
 HidePayments text overlay
 Update price from line edit
 Enable Max Change

Consolidate Screen
 Use Icons on Payments Screen

Disable Product PopUp
 Use 00 keypad button

Maximum change Ticketline height is sales panel

Basic Auditing

Remove No sales auditing older than x days
 Remove Lines removed auditing older than x days

Category buttons

Use Historic Style Category Button

Product Buttons

Use Historic Style Product Button

Width Height Text colour on button Use Opaque Text Panel

The 'Systems Option' panel offer a range of settings

Auto Logoff

Enable Auto LogOff
 Enable Inactivity Timer
 Logoff After Each Sale
 Logoff After Sending To Kitchen

Timer in seconds

In Restaurant Mode - return to tables
 Logoff After Printing

Auto Logoff

The application can be setup to automatically log off in the POS application

- After a fixed period of inactivity in seconds
- After each Sale
- After sending order to the kitchen printer
- After printing
- Or if in restaurant mode return to the tables screen

General

Sort categories by order number
 HidePayments text overlay
 Update price from line edit
 Enable Max Change

Consolidate Screen
 Use Icons on Payments Screen

Disable Product PopUp
 Use 00 keypad button

Maximum change

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Sort Categories by order number

- In the sales panel the categories are displayed in alphabetical order by default, If an order is assigned to the categories these can be used.

Consolidate screen

This option affects the way sale lines are added to a ticket.

Item	Item Price (Inc tax)	Qty	Tax Rate	Amount (inc tax)
Apples	£3.95	x1	0%	£3.95
Apples	£3.95	x1	0%	£3.95
Apples	£3.95	x1	0%	£3.95
Apples	£3.95	x1	0%	£3.95

The above shows a no consolidated screen.

Item	Item Price (Inc tax)	Qty	Tax Rate	Amount (inc tax)
Apples	£3.95	x8	0%	£31.60

The above show consolidated screen, each time the same product is scanned\added it increments the existing entry rather than creating a new ticket line.

Disable Product Popup

When using the POS the default action executed by type in a value and hitting '+' on the number pad displays the default product popup.

Chromis Administration

A calculator-style dialog box titled "Edit Line". It contains fields for Item (General Product), Amount (1), Price (£123.00), Price + Taxes (£147.60), Taxes (Tax Standard), Subtotal (£123.00), and Total (£147.60). To the right is a numeric keypad with buttons for CE, =, 7, 8, 9, 4, 5, 6, 1, 2, 3, 0, ., Cancel, and OK.

This allows the line description and some other parameters to be changed. This can be disabled using this option. When disabled the ticket line displays as shown below.



Hide Payments text overlay

This changes the appearance of the payment panel.



By default the amount is shown on each button as shown above.



When enabled no text is shown as shown.

Use Icons on Payment screen

Chromis Administration

This is another option that affects the payment panel.



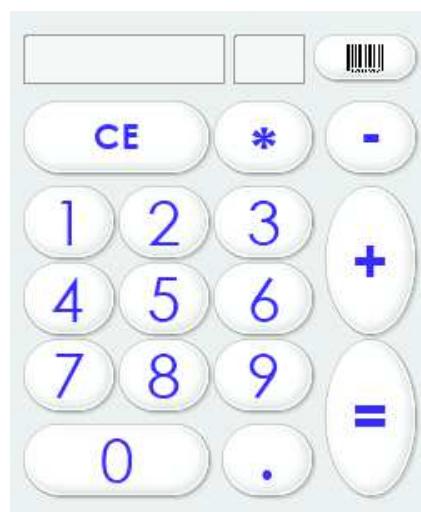
Default is shown above.



When select the above is displayed.

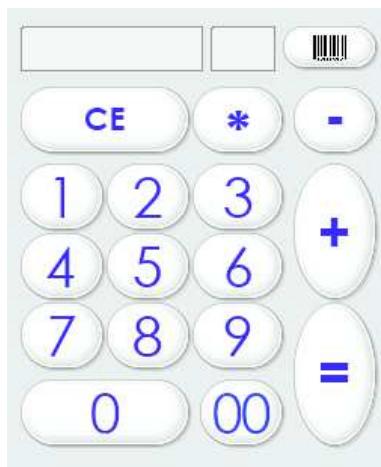
Use 00 keypad button

Some POS have 00 on the number pad. By default this is not available.



Chromis Administration

When enabled, this will be covered in more detail later.



Update price from line edit

The POS application allows you to change details of a product on the ticket line (subject to permissions). By default, any changes are only applicable to the ticket line. This allows the changes to be saved to the database, therefore affecting any further sales of the same product.

Edit Line

Item	Apples
Amount	1
Price	3.95 -1.23
Price + Taxes	£3.95
Taxes	Tax Exempt
Subtotal	£3.95
Total	£3.95

CE -

7^P_{RS} 8^T_{UV} 9^W_{XYZ}
4^G_I 5^J_{KL} 6^M_{NO}
1 2^A_{BC} 3^D_{EFG}
0 .

Default shown above

Edit Line

Item	Apples
Amount	1
Price	3.95 -1.23
Price + Taxes	£3.95
Taxes	Tax Exempt
Subtotal	£3.95
Total	£3.95

CE -

7^P_{RS} 8^T_{UV} 9^W_{XYZ}
4^G_I 5^J_{KL} 6^M_{NO}
1 2^A_{BC} 3^D_{EFG}
0 .

Chromis Administration

Enabled shown above.

Enable Max Change

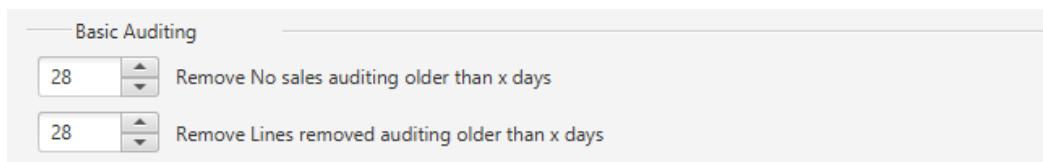
This is method of providing a warning to the user when the change due to a customer exceeds a defined amount.



It is designed to protect the accidental scan of a barcode as a input amount, resulting in a silly amount of change due.



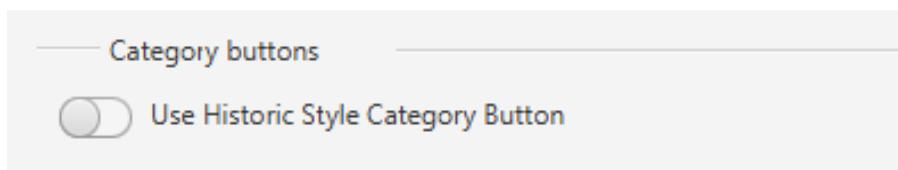
This allows you to change the height of the ticket line entry in the sales screen.



Chromis provides some basic auditing capabilities for the number of 'No Sales' and any lines removed for the sales ticket.

By default, these are cleared from the database at an age of 28 days, this is adjustable and entries can be retained for 264 days (1 year) if required. These are handled by a MySQL event schedule.

Category Buttons



You can either use the historic style for buttons in the category panel,

Chromis Administration

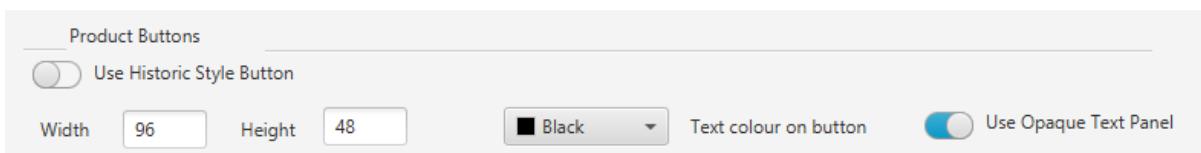


Or the new style



These can be replaced with a custom image when creating the category in the Administration application. Image size = 192 x 48 pixels.

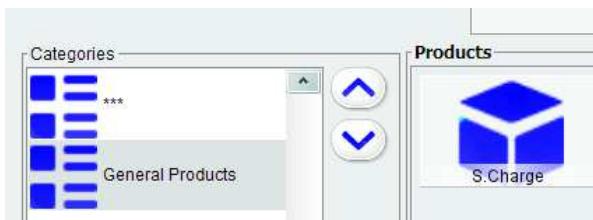
Product Buttons



This section controls the buttons used for the Category and product panels in the POS.

Use Historic

This instructs the POS to use the older style buttons, if you have migrate from an earlier version these may need to be configured.



Rather than



Chromis Administration

The size of the buttons used in the products panel can be changed in this section.

As can the colour of the text on the button.

Use Opaque Text Panel

This only applies when using historic buttons, the text background is either opaque or solid.

Ticket Setup Tab

Connected to database : chromis_pos on localhost

General Date & Time settings Payment Method System Options Ticket Setup Restaurant & Orders Sales Panel Card Setup

Receipt Setup

7 Receipt number min' length
1 Length of Pickup Number
 Receipt Print Off

Service Charge

Service Charge Enabled
Service Charge Rate 10.0 % In Restaurant mode only

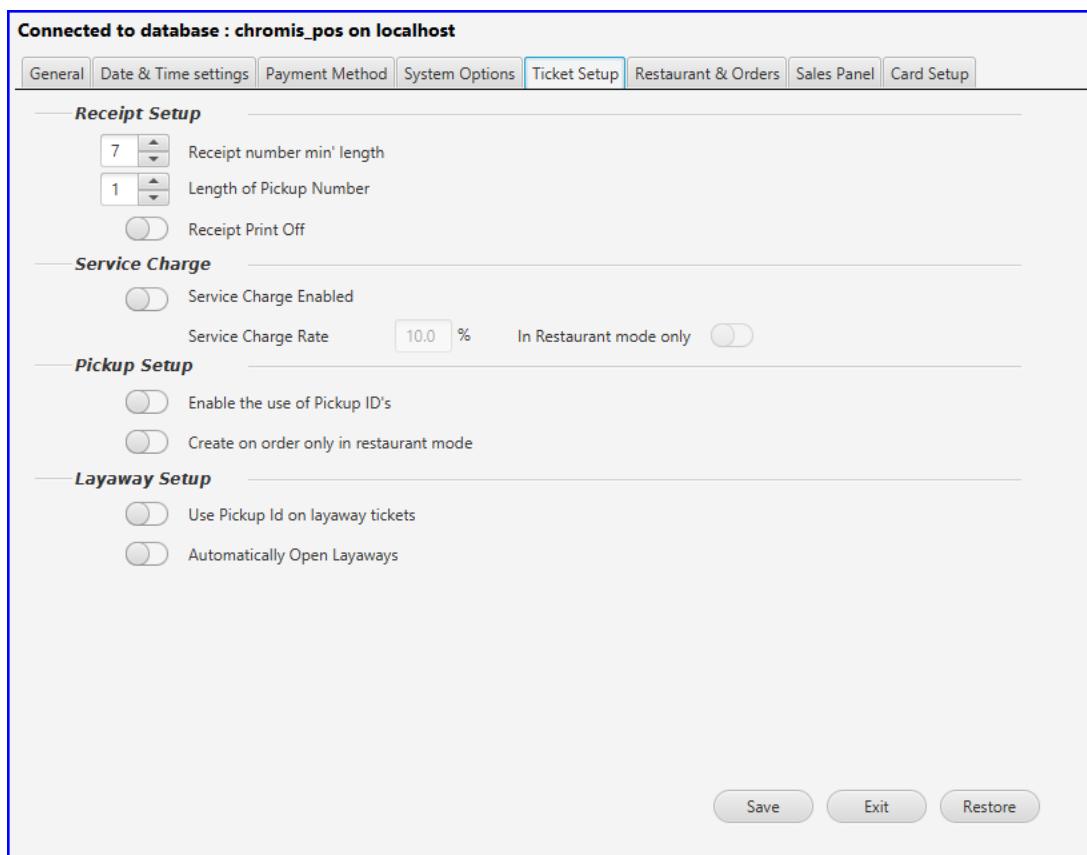
Pickup Setup

Enable the use of Pickup ID's
 Create on order only in restaurant mode

Layaway Setup

Use Pickup Id on layaway tickets
 Automatically Open Layaways

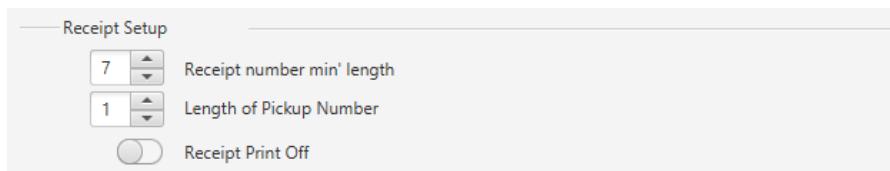
Save Exit Restore



The receipt setup

Receipt Setup

7 Receipt number min' length
1 Length of Pickup Number
 Receipt Print Off



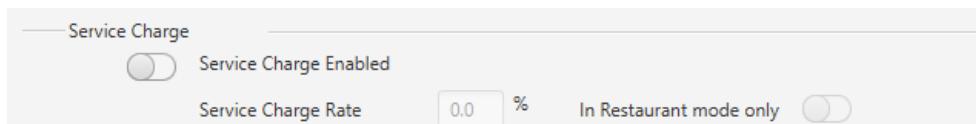
The minimum length of the receipt number is set here, this result in a leading prefix being added if required.

The minimum length of the pickup number is set here, this result in a leading prefix being added if required.

Chromis Administration

This allows receipts to be turned off by default. This can be overridden by a Warranty required or in the payment screen.

Service Charge



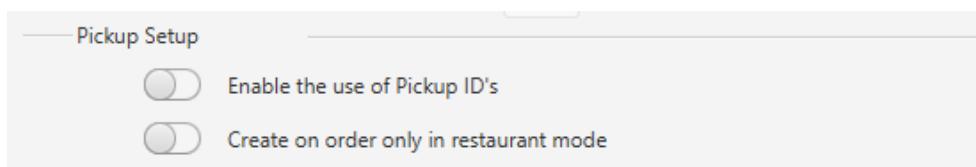
Chromis supports a default service charge capability, if you operate in an environment where a service charge is added to all sales, then enabling the Service Charge will activate the function.

If enabled as soon as an item is added to the ticket the service charge element is applied first. As new items are added the service charge is automatically updated. The service charge line can not be removed from the ticket.

If you enable this function, you need to specify a service charge rate that will be used to calculate the amount of the charge.

'In Restaurant mode only' Chromis will only apply the service charge to a ticket if the POS is setup in that mode.

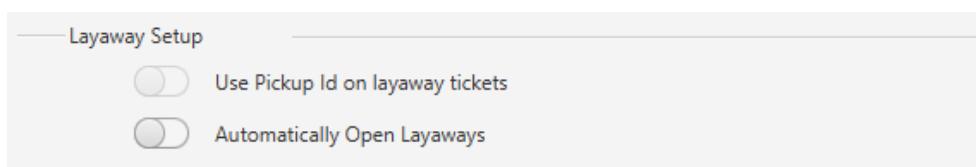
Pickup Setup



Chromis has the ability to assign a pickup id to all of its orders, which is ideal in a fast food type environment. These have to be enabled before they can be used.

'Create on order only in Restaurant mode', a pickup ID will only be created when the sale is completed while in restaurant sales mode.

Layaway Details



A layaway is created when a new ticket is started and another ticket is already. This provides the ability to save the current open ticket in a temporary area.

Chromis Administration

Use Pickup Id on layaway tickets

This option is only available if Pickup Id is enabled.

By default, layaway tickets use the details of the logged in user and the time to identify themselves.



With this enabled the application use pickup Id's



Automatically Open Layaways

This enables the automatic displaying of the Layaway tickets id enabled, when a user first logs in the POS sales Screen.

Restaurant & Orders Tab

Connected to database : chromis_pos on localhost

General Date & Time settings Payment Method System Options Ticket Setup Restaurant & Orders Sales Panel Card Setup

Table Display

Customer text colour: #003333 Show Customer details on table
Waiter text colour: #e64d4d Show waiter details on table
Table name text colour: #990000 Transparent Buttons
Auto refresh tables

Coloured Ticket Lines

Enable coloured ticketlines
Order line not sent to kitchen: #f4dfcb
Order line sent to kitchen: #ecf7d9

Save Exit Restore

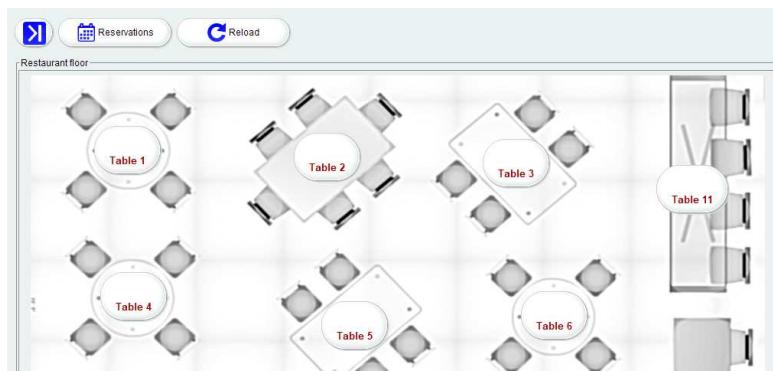
The settings on this tab are only applicable when the POS is operating in restaurant mode.

Table Display

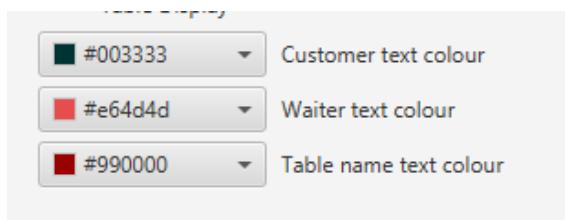
Table Display

Customer text colour: #003333 Show Customer details on table
Waiter text colour: #e64d4d Show waiter details on table
Table name text colour: #990000 Transparent Buttons
Auto refresh tables

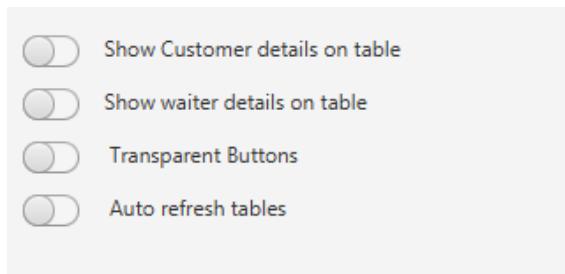
Table Display controls the appearance of the table map to the user.



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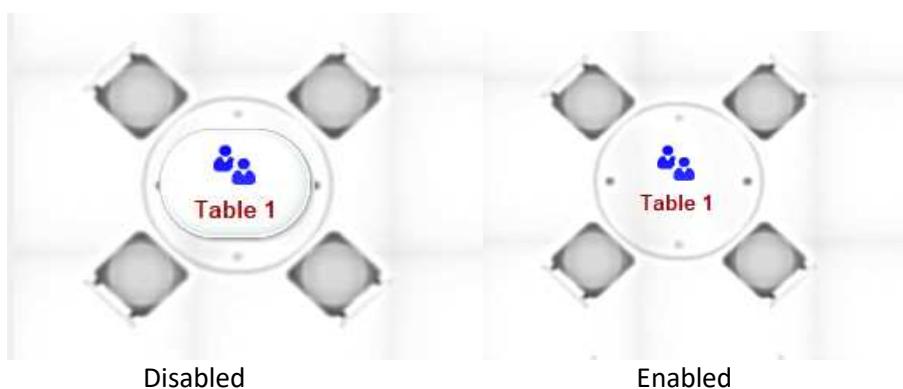


The colour of the text shown on the table can be changed to the preferences of the user.



The remaining settings control the overall appearance of the buttons.

'Transparent Buttons' make the button transparent.



'Show Customer Details on Table' shows the customer's name on the table if applicable.



'Show waiter details on table' displays the name of the waiter who opened the ticket.

Chromis Administration



All of these settings can be applied independently of each other.

'Auto refresh tables' provides the function that will update the screen, when the table status changes from another POS. The refresh rate is every 3 seconds.

Coloured Ticket Lines

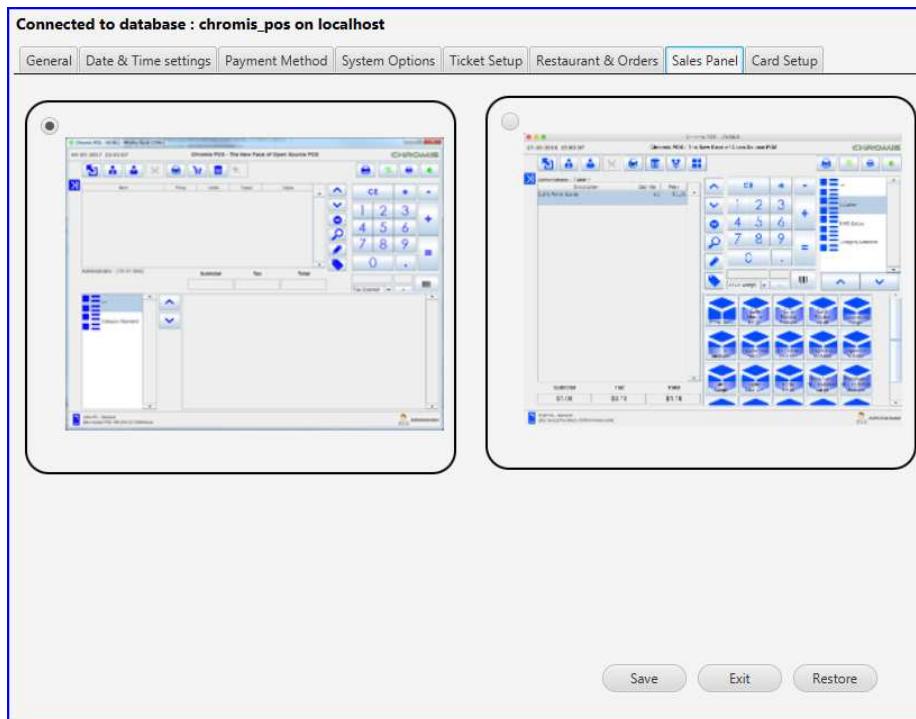


When this is enabled the background colour of ticket lines reflects the order status, when it can be sent to a remote (kitchen Printer). The colours can be adjusted to suit the preferences of the user. This provides a visual view of the order.

Sales Panel Tab

Chromis pos provides 2 different sales panels which can be used, this is selected from here.

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Card Setup Tab

Chromis provides a built-in loyalty system and electronic gift card capability. This section covers the enabling of the system, more detail is provided later in the manual on the options available for it.

Connected to database : chromis_pos on localhost

General Date & Time settings Payment Method System Options Ticket Setup Restaurant & Orders Sales Panel **Card Setup**

Loyalty Enabled

Loyalty Model Earn x points for every £ spent Points earned for each £ spent
 Earn & Burn points on selected products Points required to earn voucher
 Voucher has a value of
 Loyalty Card Number Prefix

Show all rewards

Enable for account customers

Gift Cards Enabled

Gift Card Number Prefix

MSR Settings

Magnetic card reader leading sentinel Magnetic card reader trailing sentinel

Card System Backup

An additional database is required for this function to work, see Administration manual for more details.

Card backup database Test Connection Create Schema

Connecting to database

Save Exit Restore

Chromis Administration

Loyalty

By default, the Loyalty system is not enabled, if you wish to use it then it must be enabled.

The screenshot shows the Loyalty settings page. It includes a toggle switch for 'Loyalty Enabled' which is turned on. Below it, there are two radio button options for 'Loyalty Model': 'Earn x points for every £ spent' (selected) and 'Earn & Burn points on selected products'. For the first model, fields show '15' for 'Points earned for each £ spent' and '5000' for 'Points required to earn voucher'. For the second model, a field shows '5.0' for 'Voucher has a value of'. A text input field 'M1995' is labeled 'Loyalty Card Number Prefix'. There are also two toggle switches: 'Show all rewards' (on) and 'Enable for account customers' (off).

Next you must define on how the loyalty will function, (see later section for a description of each element).

Electronic Gift Cards

Chromis provides the ability for a gift card to be provided, which can be used as payment and can be topped up. There is no rounding requirement, which means if the card has a balance of £5.00 and is used to pay a transaction of £3.00 then the card will still have a value of £2.00.

The screenshot shows the Gift Card settings page. It features a toggle switch for 'Gift Cards Enabled' which is turned off. Below it is a text input field 'M1998' labeled 'Gift Card Number Prefix'.

MSR Settings

The screenshot shows the MSR Settings page. It displays two sentinel configuration fields: 'Magnetic card reader leading sentinel' with a colon icon and 'Magnetic card reader trailing sentinel' with a question mark icon.

If you are planning to use a MSR (Magnetic Stripe Reader), all MSR's use sentinels to indicate the beginning and end of the track data. These are normally configured using a utility supplied with the device. Chromis needs to be aware of these sentinels.

Card System Backup

The screenshot shows the Card System Backup page. It includes a note: 'An additional database is required for this function to work, see Administration manual for more details.' Below this are three buttons: 'Card backup database' (set to 'chromis_trans'), 'Test Connection', and 'Create Schema'. A progress bar at the bottom indicates 'Connecting to database'

Gift and Loyalty cards by their nature hold a monetary value, it these should ideally be backup on a regular basis. The disadvantage of daily database backups they are a point in time process, what this means if the database is backup at 01:00 each morning and then the system is lost and card

Chromis Administration

transaction since the backup are lost. This would include any gift card top-ups as the data is held in the database and not on the card.

There are options to reduce this risk and these include database replication, however these are out of scope for this application.

To assist with the recoverability of card details, Chromis has the ability to copy all card transaction data to a backup database. This option only becomes available once either Loyalty or gift cards are enabled.

To implement this requires the administrator to complete some changes to the MySQL platform and the availability of an additional disk to MySQL server. (this should not be the same data disk used by the Chromis database).

Implementing the backup

A MySQL server has a method that utilizes Symbolic Links, this allows the new database directory to be located on another disk and pointer created in the normal database directory. The only disadvantage of this is that the database must be created and then moved. This new database will only contain the 4 key tables that hold the card data.

Once this has been setup triggers are then created on the 4 key tables that hold the card data, these trigger monitor for data inserts on all of tables and updates on 2 of them. Every time any data is added or updated to the table MySQL will immediately write the same data to the backup database.

This data does not contain customer details but it does provide enough information to allow the main card tables to be restored back to the very last transaction it recorded. In the event that you need to recover this data, assistance should be sought from the Chromis team.

It is also recommended that this database is backup daily.

The implementation steps are outlined below (it assumes that MySQL is using innodb).

Obtain the current data directory used by MySQL by running the following sql query

- SHOW VARIABLES LIKE 'datadir';
-

Result Grid		Filter Rows:	Export:	Wrap Cell Content:
Variable_name	Value			
datadir	C:\ProgramData\MySQL\MySQL Server 8.0\Data\			

Linux

- Create a new database ie 'chromis_trans', this must be done manually.
- Stop the database service
- Move the database to a folder on the new disk
- Create the symbolic link `In -s /path/to/chromis_trans /path/to/datadir`
- Restart the service

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*Above steps still need to be confirmed

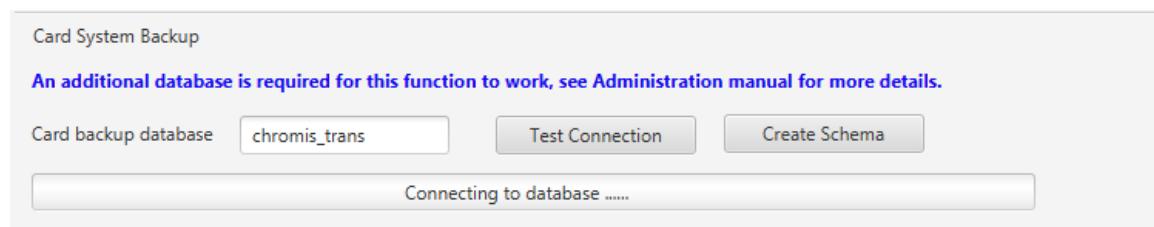
Windows

- Create a new database ie 'chromis_trans', this must be done manually.
- Stop the database service
- Move the database to a folder on the new disk eg (D:\data\
• Create the symbolic link mklink /d chromis_trans D:\data\chromis_trans
- Restart the service

#innodb_temp	24/05/2021 16:58	File folder
chromis_trans	24/05/2021 18:53	File folder
chromisexec	02/05/2021 16:22	File folder
chromismonitor	20/04/2021 16:50	File folder

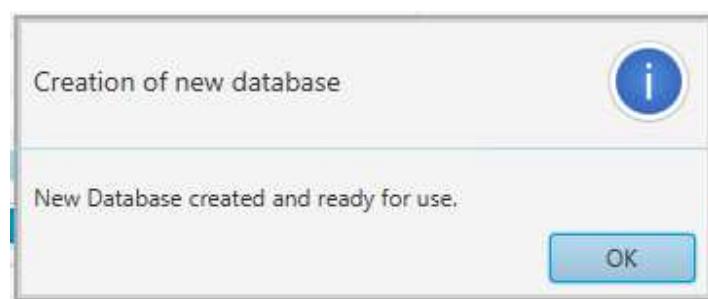
The link should appear in the current data folder as a shortcut.

Once the above has been done, the remaining work needs to be completed using this application.



Enter the name a that was used to create the database, and click 'Create Schema'. This will then create the tables into the backup database and create the triggers on the Chromis database.

Once completed, the following dialog should be displayed.



Whilst it is not necessary to implement this it is highly recommended if Gift or Loyalty cards are used.



Multi Lingual Support

Chromis Administration

Chromis provides the ability to operate in languages other than English.

To operate in any language other than English the property files must be in the locale folder of the Chromis installation. At the time of this documentation only the English version is available, as other languages become available, they will be made available either in source forge or Chromis.co.uk.

These files will also be added to any upgrades released.

The language being used is indicated on the Date & Time settings tab in the system config application



You will need this information to create your own language files if they do not exist.

In the locales folder there are currently 7 files

Name	Date modified	Type	Size
chromis_resource.properties	04/11/2021 22:43	PROPERTIES File	2 KB
chromisadmin.properties	04/11/2021 22:43	PROPERTIES File	47 KB
chromispos.properties	04/11/2021 22:43	PROPERTIES File	14 KB
chromissetup.properties	04/11/2021 22:43	PROPERTIES File	8 KB
dbpermissions.properties	04/11/2021 22:43	PROPERTIES File	9 KB
report_labels.properties	04/11/2021 22:43	PROPERTIES File	6 KB
tooltips.properties	04/11/2021 22:43	PROPERTIES File	2 KB

Make a copy of each one of these in the same folder and change the copy's name to include the system locale identifier. (This is not required for English as the application default to this).

Eg

tooltips.properties -> tooltips_en_GB.properties.

You can then edit the new file with the correct translations. If you wish to submit any translated file to the project, please use source forge.

<https://sourceforge.net/p/chromispos/discussion/langfiles/>



Administration

Chromis Administration

Chromis is divide into 2 main areas, this provides a greater flexibility when working.

- Administration
- Point of Sale

All of the backend work is completed in the Administration application, and needs to the next part of the installation process to be completed before using the Point-of-Sale application.

In this section we will cover refining and configuring Chromis for use.

We will work through in a natural progression from enabling Chromis to work as basic, then covering more features.

Chromis, out the box will function, but there will be limitations,

- Tax elements are setup up for UK
- No specific products
- Only a couple of categories for the products

During the use of the application, you will interact via actions associated the Icon toolbar or Icons elsewhere in the panels.

It is important to understand the way Chromis works with the cost value of products.

There are in effect two ways to maintain COGS (Cost of goods sold).

- Batch cost
- Weight Average Cost (WAC)

Chromis uses WAC, what this means the cost of goods is always recalculated each time a delivery is received, and this average cost is then used for all sales going forward until another delivery is received.

If you are not aware of how WAC works, this is a brief example

You purchase a 100 unit of product x @ £1.15 a unit. You then place another order for the same product however the cost has gone up to £1.30 a unit. At the time of purchasing the next delivery you had already sold 54 units with the cost price of £1.15.

*This means that the current cost of the good in stock is $46 * 1.15 = 52.90$
The new delivery has a cost value of $100 * 1.30 = 130.00$*

So that means the cost value of goods in stock is 182.90 and the average cost of each unit from that point is £1.252. Each time a delivery comes in the average cost is recalculated.

Chromis Administration

The icons and their actions are shown below. (Some icons have a different action depending upon the panel)

	Record Save
	File Save (Colour indicates that there are Unsaved Changes)
	Select top row
	Previous Row
	Next Row
	Select last row
	Refresh Record
	Add a New Record
	Search the records
	Delete the record
	Open File explorer
	Remove, this is different from delete as only removes an element and not the record
	Cancel order
	Close order viewer

	Receipt order
	Reset search results
	Create image resource
	Print
	Create text resource
	Create binary resource
	Use Camera or take photo

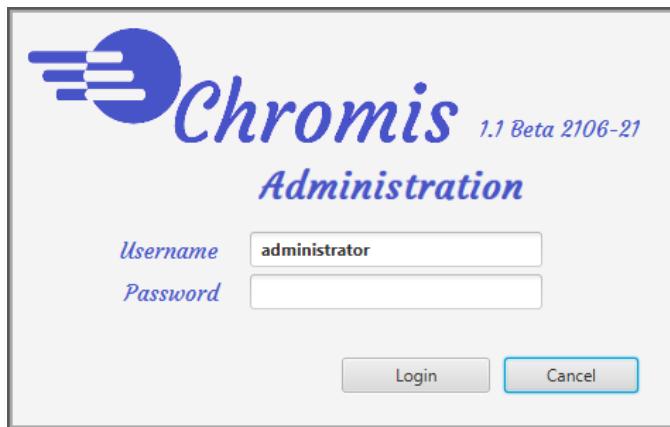
Getting Started

When the Administration application is started a splash screen is displayed as Chromis attempts to connect to the database.



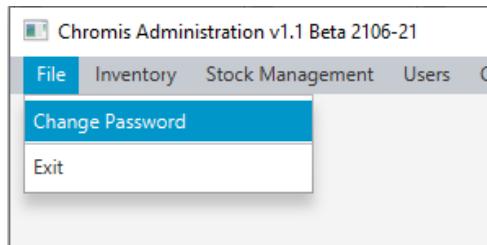
To use the Administration application, you must be logged onto the system.

Chromis Administration



The default administrator account is 'administrator' with no password.

Your very first task should be to change this password.



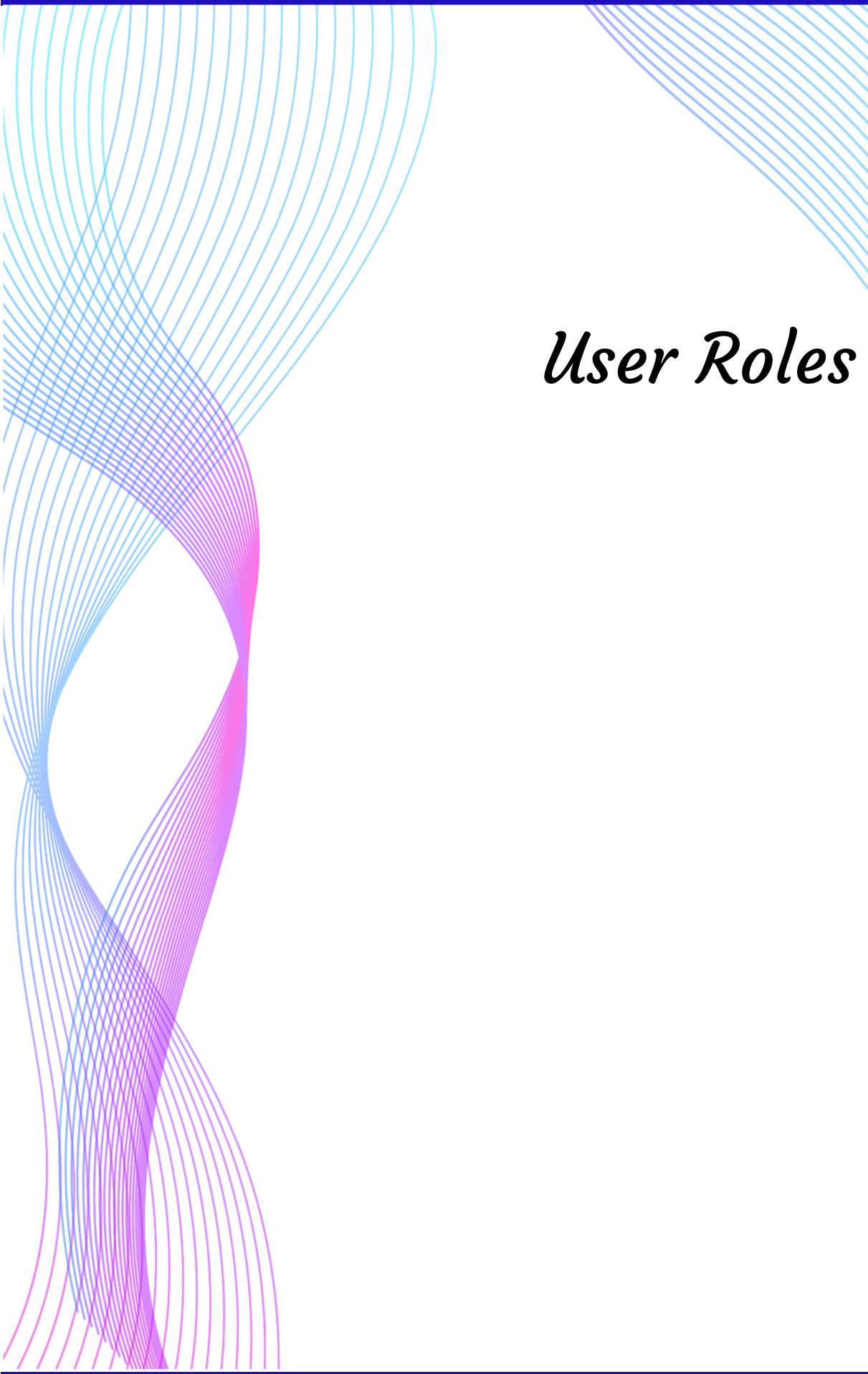
As with most password change capabilities, you need to provide your current password and new one twice.



Once you have logged on to the system, you will have access to the menu and its option based upon your rights.

By default, the administrator has full access to the system.

At this point looking at 'User Roles' & 'Users' makes an ideal starting point.



User Roles

Chromis Administration

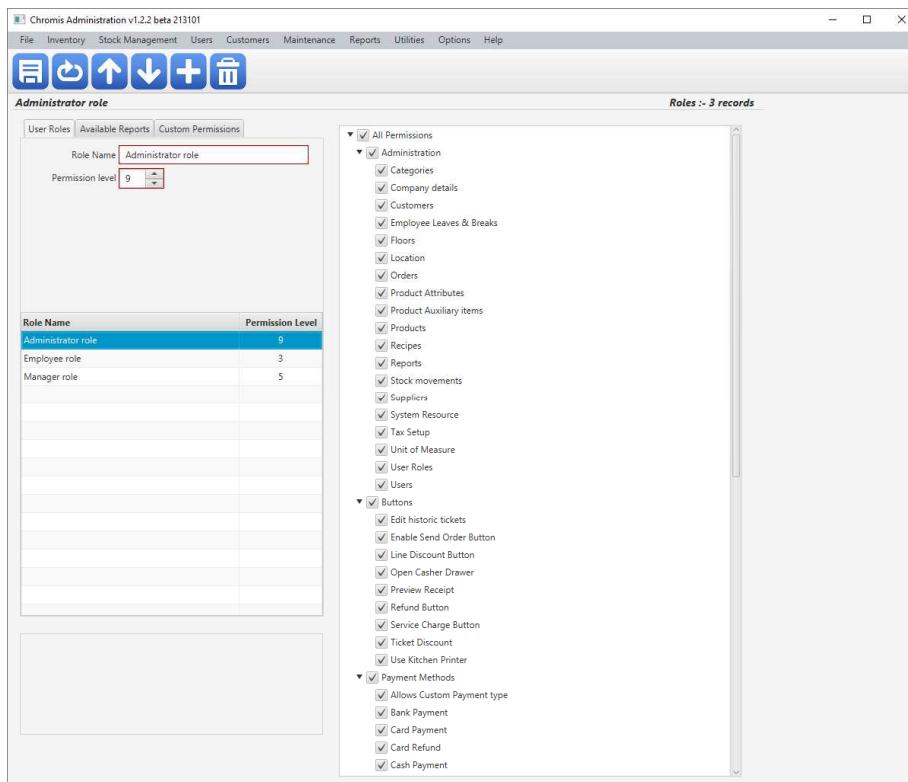
When working with users, there are 2 elements

- User Roles
- Users

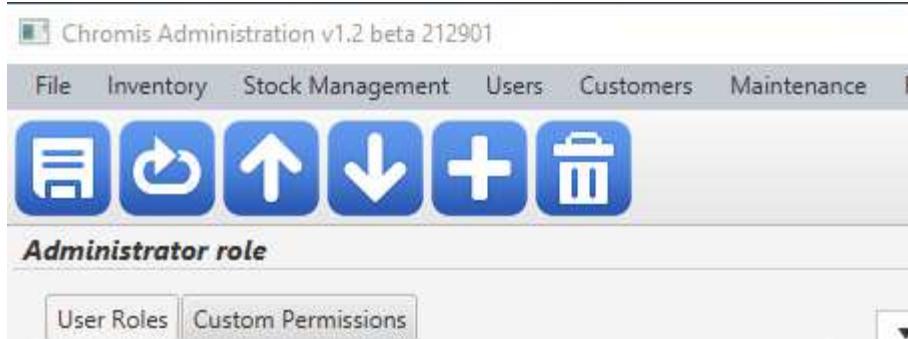
User Roles hold the rights to the system. Once these have been defined, they are then applied to the Users.

It is recommended that only an administrator is allowed to define the ‘User Roles’ used by the system.

Open ‘User Roles’ from ‘User Access – User Roles’



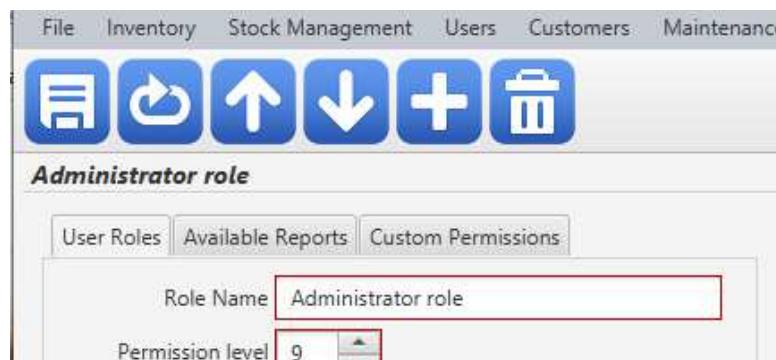
Across the top of the screen there is a group of icons, you will see these on each of the screens. (the icons can change from the default depending upon the section being used)



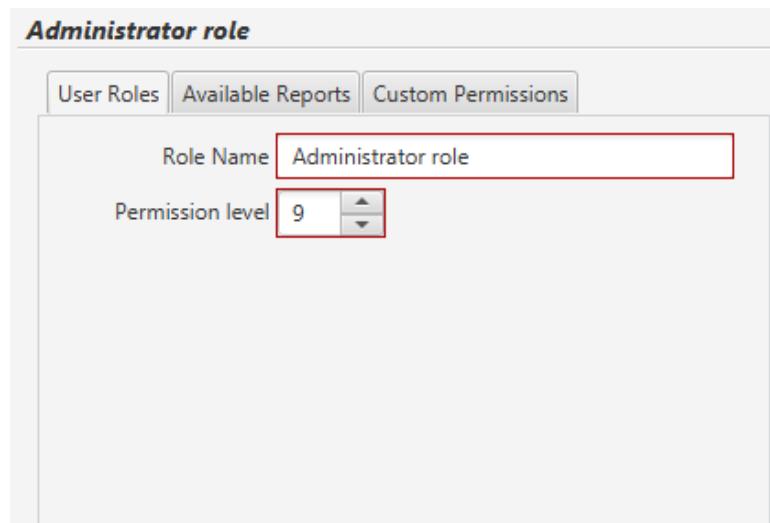
Chromis Administration

Below the icon panel the is an indicator of the role you are currently editing.

User Roles has 3 tabs, 'User Roles', 'Available Reports' & 'Custom Permissions'



User Roles Panel



Each role has a permissions level 1 – 9, using this permission provides the ability to control what a person with the rights to manage users can do.

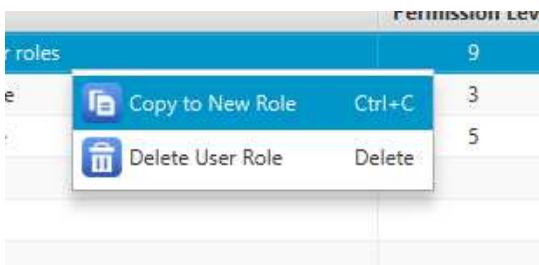
A user cannot create another user with a permissions level equal or above their own level. This feature would allow for a manager to only create user with a user role below him.

It is important that consideration is given to these roles, you can have multiple roles with the same permission level, with each role having different capabilities in the system.

Below the Roles information panel, there is a list which shows the roles this account can modify.

Chromis Administration

Right click on a role displays a context menu.



This provides shortcuts to 2 options

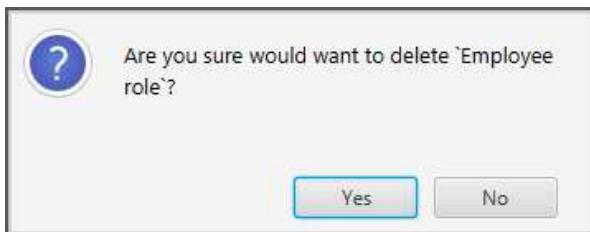
- Copy the current role to a new entry
 - Delete the current entry

Copy current role will create a new entry with named the same as the source with ‘ – Copy’ append, of course this can be changed.

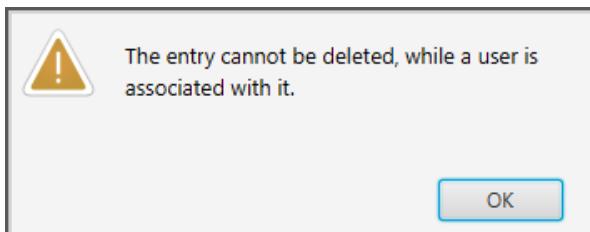
User Roles	Available Reports	Custom Permissions
Role Name	Employee role - Copy	
Permission level	3	<input type="button" value="▲"/> <input type="button" value="▼"/>

When you attempt to delete an entry, you will be asked to confirm the action.

Chromis Administration



If the entry is associated a user, the role cannot be deleted.



Rights Panel

The panel on the right has a check list of rights within the system. These are the rights that can be associated with the user role.

A screenshot of a software window titled "Rights Panel". It displays a hierarchical list of permissions. The "All Permissions" section is expanded, showing various categories like Administration, Buttons, and others, each with a list of checked checkboxes. A vertical scroll bar is visible on the right side of the list area.

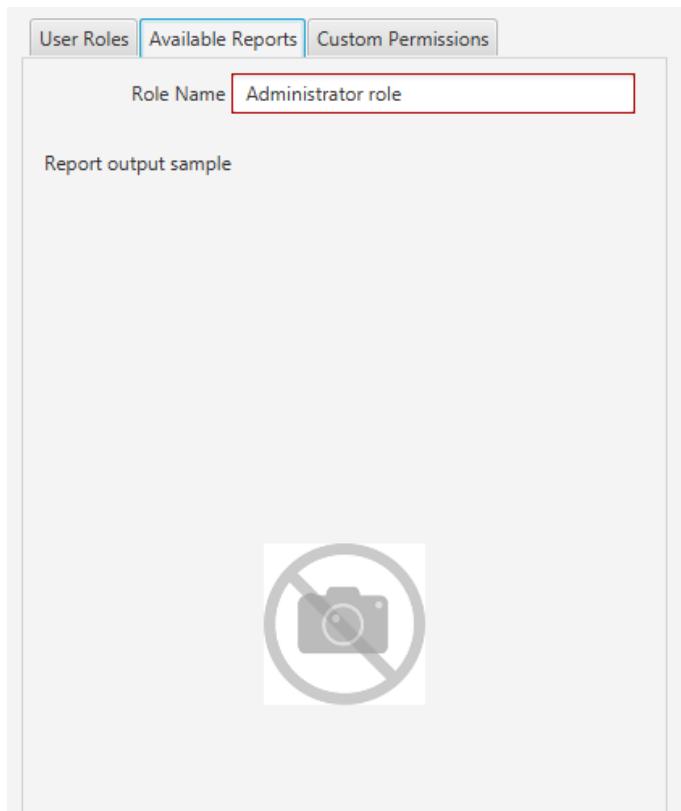
Chromis Administration

When you select on a right a description of it is shown below the roles list

Allows the user to edit the Attributes associated with a product.

Available Reports Panel

This option is only displayed when the user login has a permission level 9.



In this panel the 'Role Name' is inherited from the selected user. To change this go back to the 'User Roles' and select the required role.

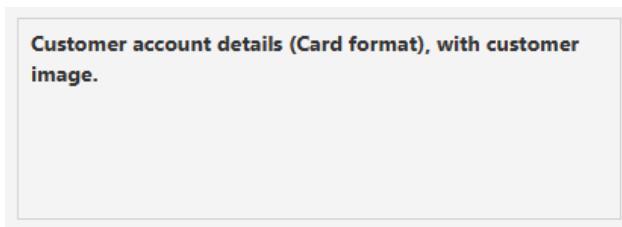
If a sample screen of the report is available it will be displayed in this panel, when the report is selected in the report tree.

Chromis Administration

- ▼ All Reports
- ▼ Customers
 - Customer Debtors
 - Customers (Card Style)
 - Customers Diary
 - Customers List
 - Debtors (Card Style)
 - Sales By Customer
- ▼ Labels
 - Labels: Barcode
 - Labels: Shelf-Edge Labels
- ▼ People
 - Daily Presence
 - Daily Schedule
 - Users
- ▼ Sales
 - Cash Closed
 - Cash Closed (Export)
 - Cash-Flow
 - Category Sales
 - Category Sales - chart
 - Payments
 - Product Sales Bar Chart
 - Product Sales By Terminal
 - Product Sales: Profit
 - Sales by Category Bar Chart
 - Sales by User
 - Tax: Category Sales

It is here the report access can be revoked or granted to the Role selected. By default, no User Role has any rights to access any report.

When a report is select, its description is displayed.



If there is a sample image available this will also be displayed, this helps to provide the person setup the 'User Roles' with a quick visual of it.

Chromis Administration

Report output sample

Chromis Printed Aug 16, 2021 10:24:30 pm
Customers

Name	Address	Max Deb	Notes
Terry White Account No. TW121773193	42 Oldham Road Oldham OL12 3RE	£100.00	This is test message for the customer Terry White.
James Green Account No. JG1812713		£5.00	
Phil Jackson Account No. PJ9192813123E		£1,500.00	
Mary Smith Account No. MS4651445		£5.00	

1 / 2

Granting access to a report does not override the access to the 'Reports' menu access in the permissions selection.

Custom Permissions Panel

This option is only displayed when the user login has a permission level 9.

Chromis Administration

User Roles Custom Permissions

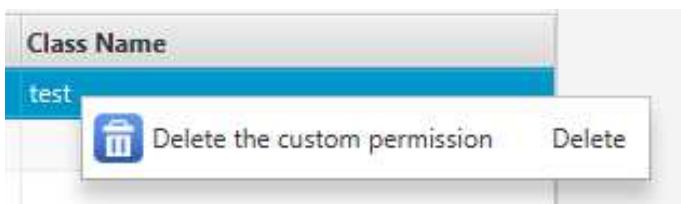
Entry Section
Displayed Name
Classname
Description

This panel allows for the creation a custom rights entry into the system. Chromis provides the ability to allow extra buttons and scripts the be created, it is these custom permissions which provide the ability control access to any such object created.

When you open this panel, you are not able to make changes to the rights tree, this is reflected as shown below.



Right clicking on an entry in the Custom Permissions table,



Again, when you attempt to delete an entry, you will be asked to confirm the action.

Chromis Administration



Add a new record

The add new record icon responds differently depending on which tab 'User Roles' or 'Custom Permissions' is open at the time. It will create either a new Role record or a Custom permission.

In the 'User Roles' tab

New Role Record

User Roles	Available Reports	Custom Permissions
Role Name		
Permission level	3	▲ ▼

In 'Custom Permissions' tab

New Custom Permissions

User Roles	Available Reports	Custom Permissions
Entry Section		
Displayed Name		
Classname		
Description		

Chromis Administration

An input field on the panel with a red outline, indicates that it is a required entry.

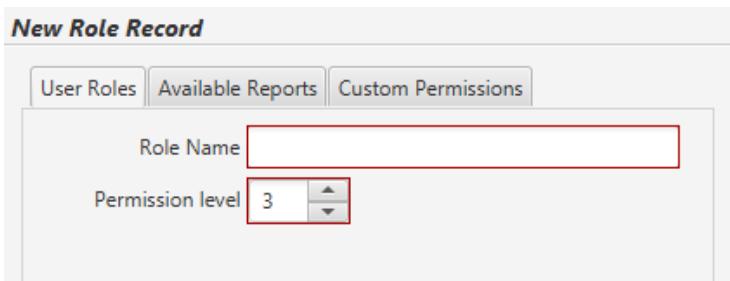
As part of the save process a number of checks are done and any issues are passed back to the user.

New Role Record

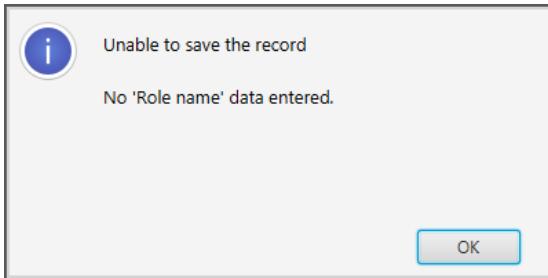
User Roles Available Reports Custom Permissions

Role Name

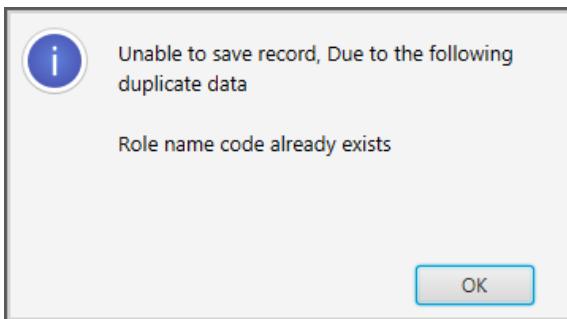
Permission level 3

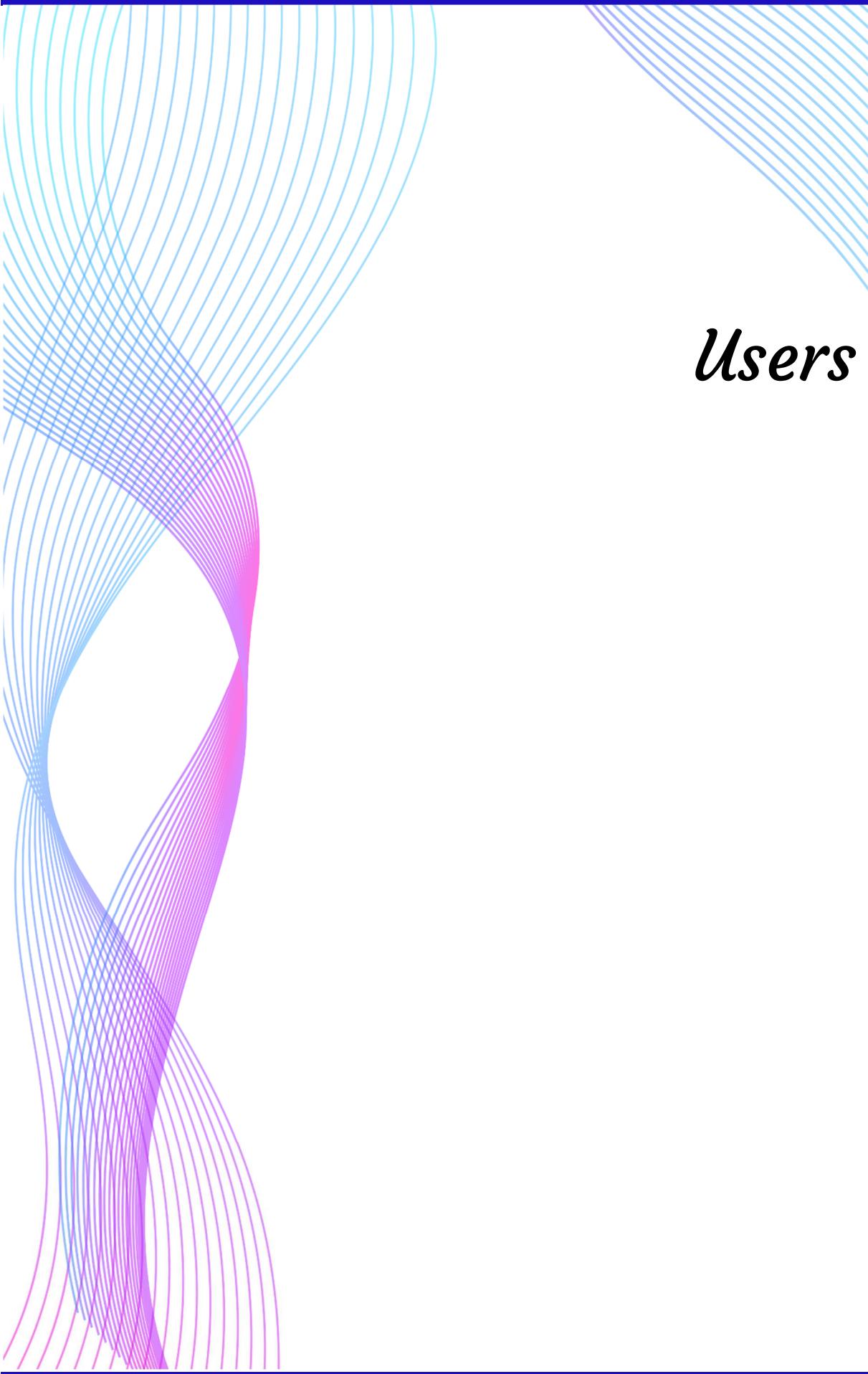


If you attempt to save the above record, you will not be able to



Also, as part of the save process, there is also a check for duplicate records. If you create a new record and give it the same name as existing record, then try to save it.

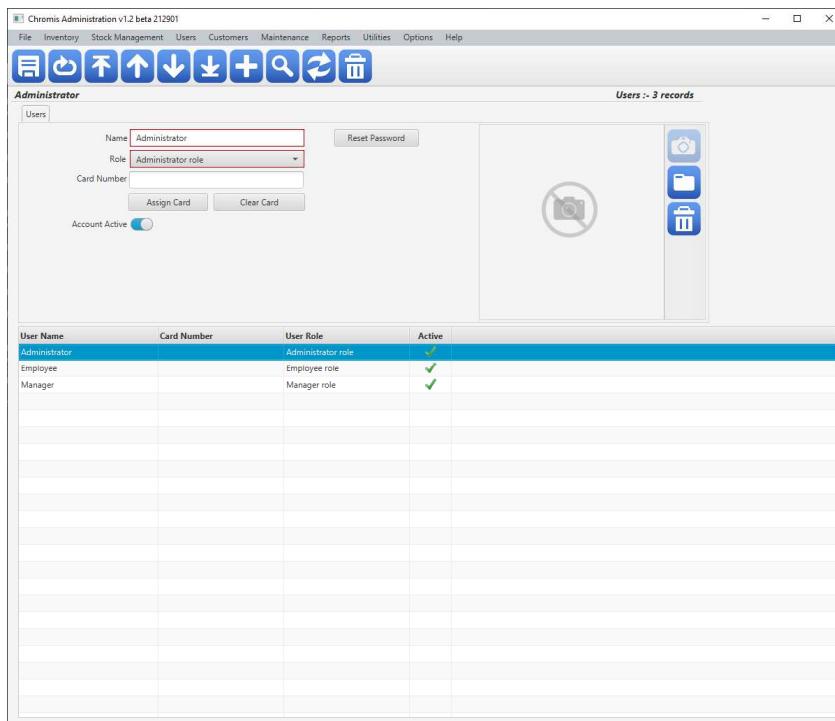




Users

Chromis Administration

Open 'Users' from 'User Access – Users'



When opening the User panel, you will only see a list of User below you rights level.



When you create a new user there are 2 compulsory fields required

- Name
- Role

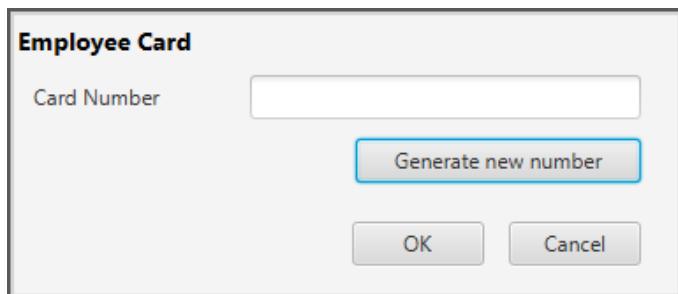
The name of the user must be unique and the role is selected from a drop-down list.

By default, the account is active.

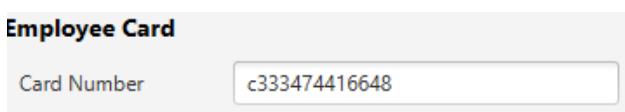
Name	Administrator	Reset Password
Role	Administrator roles	
Card Number		
Assign Card	Clear Card	
Account Active	<input checked="" type="checkbox"/>	

Chromis Administration

If you wish to assign a card number, you need select ‘Assign Card’ a card number cannot be assigned from the main screen.



You can allow the system to generate a card number, by selecting ‘Generate new number’, all system generated card start with ‘c’



Or on this screen you input your own card number.

If you wish to remove the card number select ‘Clear Card’

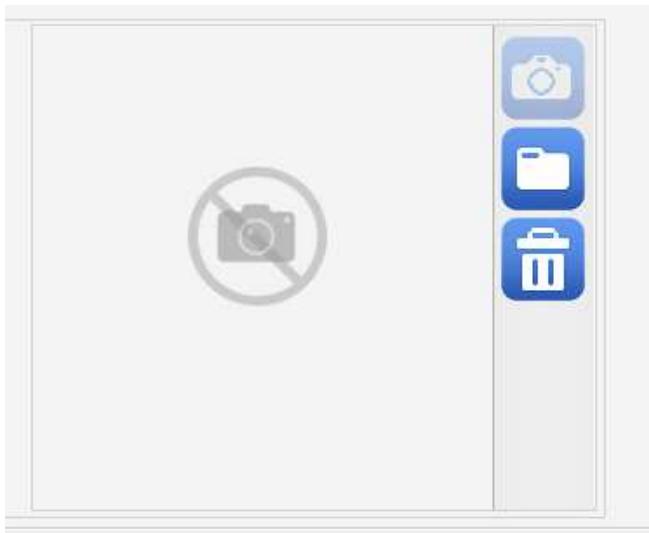
By default, no password is assigned to the user, to set one select ‘Reset Password’



A password can now be assigned to the user.

You can assign a picture to the record if you wish using the image panel to the right.

Chromis Administration

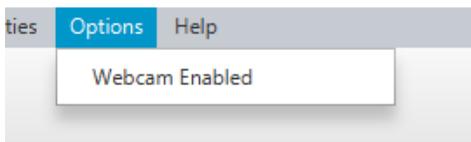


There are three ways to add an image

- Select a file
- Drag and Drop
- Webcam (You must have a webcam for this to be used and enabled it in the application)

If you have a webcam available and wish to use it to capture images, you need to enable it in the application. This application stores some of its settings in the machines OS, there it has to be enabled on any machine where you wish to use it.

To enable the webcam, go to 'Options' in the menu and enable the camera. It can take a couple of seconds to initialize the camera.



After this providing you do not change the setting, the camera will be initialized on starting the application

Close the form and re-open it to make the button available. (just clicking on 'User Access – Users' achieves the same).

Selecting the camera open the camera panel.



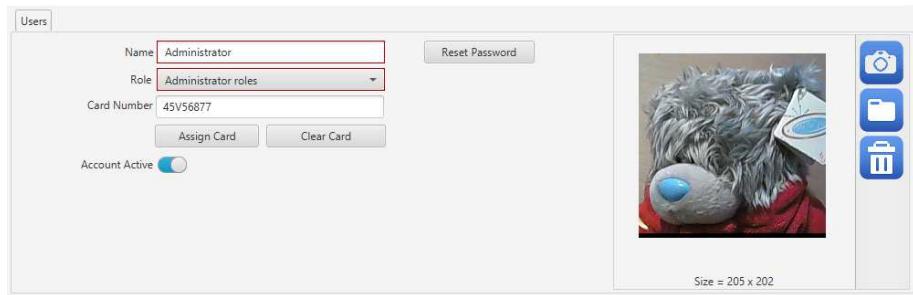
If wish to select just a region. Click in the image panel and create the select region by dragging a rectangle.



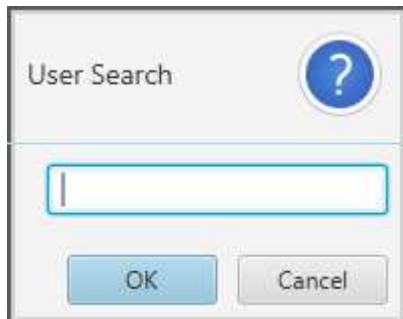
Once you are happy select the camera icon and the mage will be transfer to the user panel. There is a recommend image size, if you image size is greater than this you can reduce it to the maximum recommended.



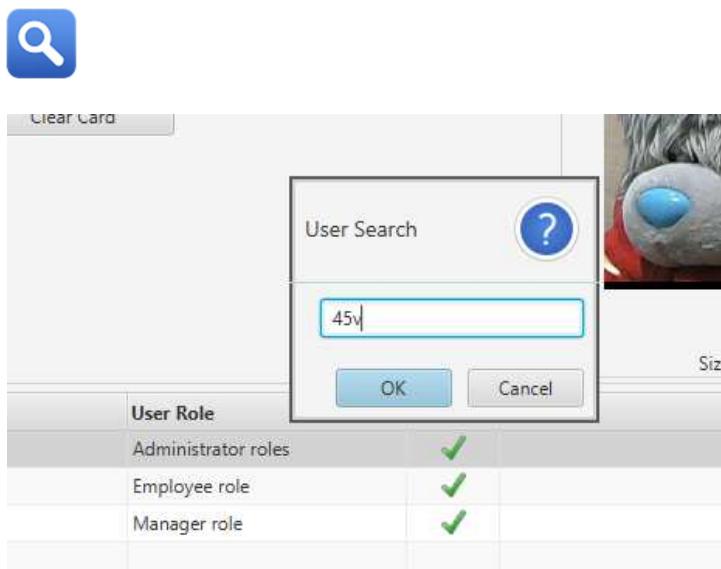
Chromis Administration



If you have large number of users and wish to shorten the display list, use the search icon.



In most search case it is based around a like search and checks user name and card number



Supplying '45v' and search check all names and cards for that string

This screenshot shows a table of user data. The columns are 'User Name', 'Card Number', 'User Role', and 'Active'. A single row is visible for 'Administrator' with values '45V56877', 'Administrator roles', and a checked 'Active' box. A blue circular refresh icon is located at the top right of the table area.

User Name	Card Number	User Role	Active
Administrator	45V56877	Administrator roles	✓
		Employee role	✓
		Manager role	✓

To restore the display, select the refresh icon . This will reload the data back into the table.



Chromis Administration

Before any products can be added, the taxes should be created in the system. Chromis comes with 3 taxes already created.

Open the Taxes panel ‘Maintenance – Tax Setup’

The screenshot shows the 'Maintenance' tab selected in the top navigation bar. A dropdown menu is open under 'Maintenance' with 'Tax Setup' highlighted. The main window displays the 'Tax Zero Rated' configuration. On the left, there's a table for 'Category Name' with rows for 'Tax Exempt', 'Tax Standard', and 'Tax Zero Rated', all marked as 'In Use'. On the right, there are input fields for 'Name' (set to 'Tax Zero Rated'), 'Tax Rate' (set to '0.00 %'), and 'Tax Category' (set to 'Tax Zero Rated'). Below these are tables for 'Parent Tax' (showing 'Tax Exempt' with rate 0.00) and 'Children Taxes' (showing 'Tax Zero Rated' with rate 0.00, 'Tax Exempt' with rate 0.00, and 'Tax Standard' with rate 20.00). A message 'No content in table' is visible at the bottom of the left table area.

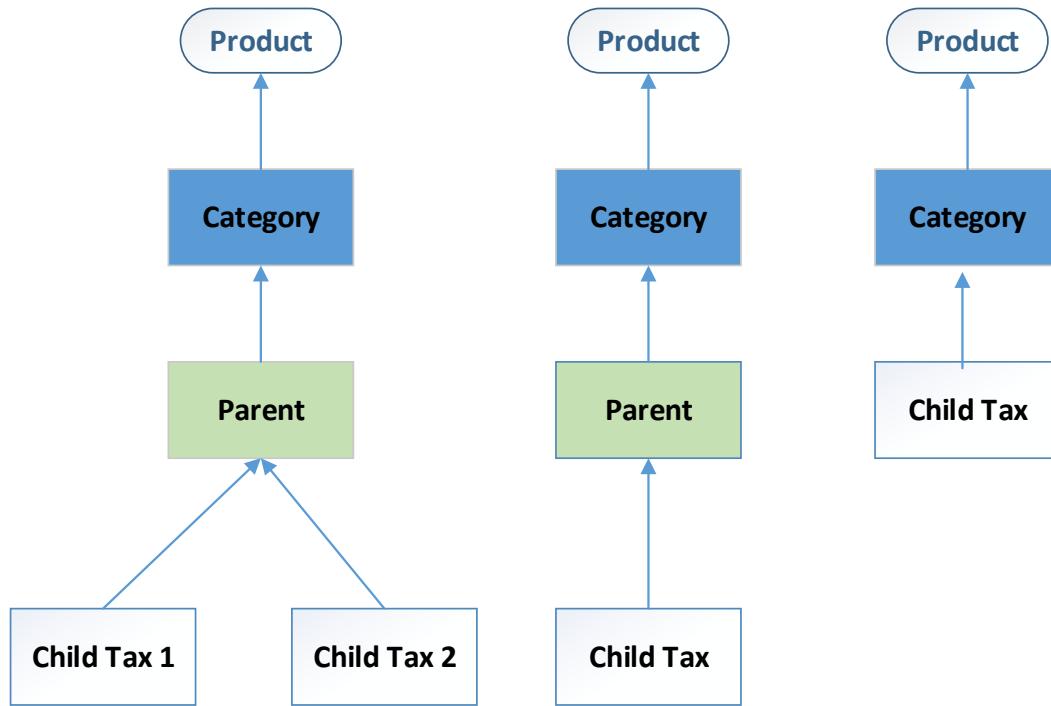
It is important that you understand how the taxes work in Chromis.

The tax structure consists of 2 elements

- Tax Category
- Taxes

The tax elements can be either a Child or Parent.

Chromis Administration



The above shows 3 examples of the structure of the tax model.

On the left we have a situation where multiple child taxes are applied to a parent (in the example we show 2, however it could more).

The centre shows the same principle but with a single child tax, and the right side shows the tax model with no children.

Parents are now created as a separate element, (It starts as a tax record), that role becomes automatically assigned upon a tax record nominating it as a parent.

Below shows the same information as above in the Chromis Taxes Setup panel

Category Name	In Use
Multiple Children	
Single Child	
Tax Exempt	✓
Tax Standard	✓
Tax Zero Rated	

Category Name	In Use
Multiple Children	
Single Child	
Tax Exempt	✓
Tax Standard	✓
Tax Zero Rated	

Category Name	In Use
Multiple Children	
Single Child	
Tax Exempt	✓
Tax Standard	✓
Tax Zero Rated	

Parent Tax	Rate %
Tax 8%	8.00
Single Child example	7.00

Children Taxes	Rate %
Tax 1%	1.00
Std Tax 7%	7.00

Parent Tax	Rate %
Tax Standard	20.00
Children Taxes	Rate %

It is important to understand the differences in the parent and the tax rates in the above examples.

Chromis Administration

When the parent has children, the tax rate that applies to it are calculated from its children. Without any children then the tax rate must be specified as part of the tax record.

Some simple rules apply to the elements of the taxes

1. A category can only have a single parent
2. A parent can have 0 or more children.
3. A child can only have a single parent
4. A tax record can be both a child and assigned directly to a category at the same time (In effect a parent).
5. Tax records cannot be applied directly to a product.

The logic in the application is designed to prevent the above rules being broken.

It is also worthwhile noting that the taxes are protected if they are linked to a product. No element of the tax can be deleted if linked.

Chromis has 3 default categories & 3 taxes, which conform to the right side of the above diagram.

It is easier to explain taxes, by working through an example

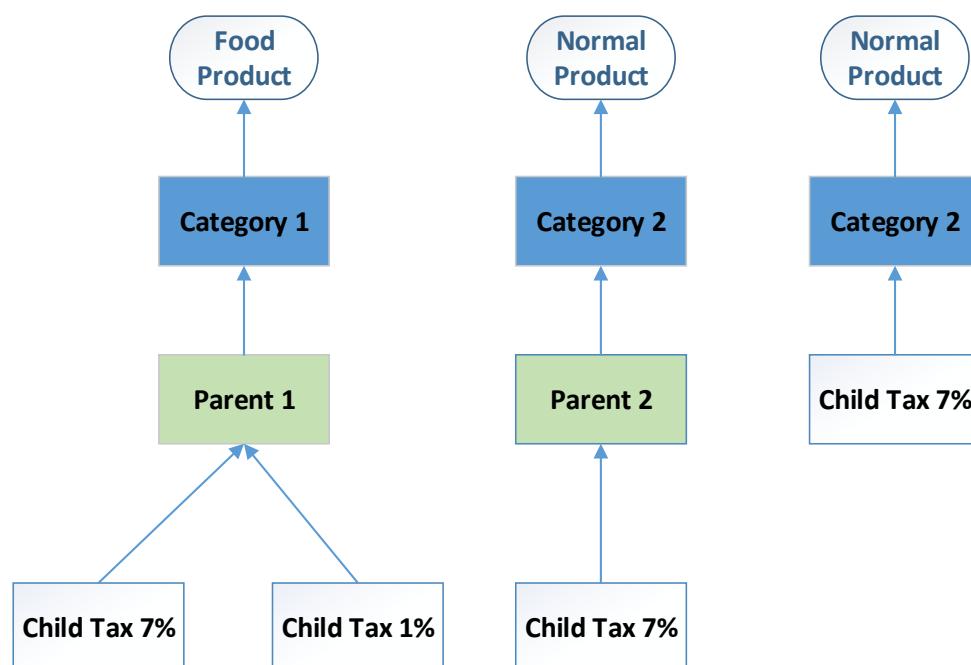
Scenario

*You operate a business where you sell products for which you must charge a 7% tax rate
If you sell a hot food product it is subject to an additional 1% tax*

Using the above you can see we need to be able to charge 1 of 2 taxes based on the item being sold.

- A standard 7% rate
- One for hot food 8% rate

If you look at this using the example diagram above, you should have the options as shown below.



Chromis Administration

Ideally try to use the least number of tax records as possible, to make the management easier.

It shows exactly what is needed for the food tax, however there is a choice for the standard product tax, either the centre or right-hand options.

Reviewing the rules (#5) dictates that 2 categories are needed to deliver the solution.

Starting with most complex, 2 records are needed to create the tax which includes the hot food element, which combine to give 8%

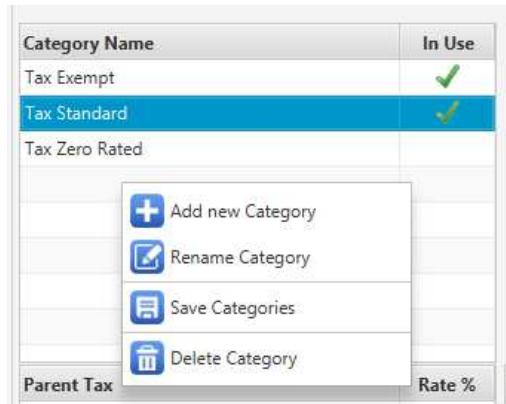
- 7% Tax
- 1% Tax

Because there is the need to combine 7% & 1%, record is required which will become a parent.

So, for a starting point 3 records are needed

Let's create that one first.

So first create the 2 categories, by right clicking in the category panel



Select 'Add new Category'



Supply the name for the new Category (for the scenario 'Food Tax' will be used for the first). Repeat and add the second (Standard Rate will used for the name).

Chromis Administration



These categories should now be in the Category table

Category Name	In Use
Tax Exempt	✓
Tax Standard	✓
Tax Zero Rated	
Food Tax	
Standard Rate	

The next layer down in the example are the tax records which will become the parents.

Select to add a new tax record.

For the 'parent 1' the name 'Food Parent' will be used. This tax record will also be associated with the 'Food Tax' category created earlier.

Because this tax record will have children, there is no requirement to set the 'Tax rate', leave it at 0.000%

Selecting the category 'Food Tax' will now show that it has a tax record associated to it.

Chromis Administration

Category Name	In Use
Food Tax	
Standard Rate	
Tax Exempt	✓
Tax Standard	✓
Tax Zero Rated	
Parent Tax	Rate %
Food Parent	0.00
Children Taxes	Rate %

Now for its children tax records

First the 7% element, add a new record

A screenshot of a web-based form for adding a new tax record. The form has four fields: 'Name' with value 'Tax 7%', 'Tax Rate' with value '7.000 %', 'Tax Category' with a dropdown menu, and 'Parent' with a dropdown menu set to 'Food Parent'. The 'Parent' field is highlighted with a blue border.

And assign a parent to it,

No add the 1% element, add a new record

A screenshot of a web-based form for adding a new tax record. The form has four fields: 'Name' with value 'Tax 1%', 'Tax Rate' with value '1.000 %', 'Tax Category' with a dropdown menu, and 'Parent' with a dropdown menu set to 'Food Parent'. The 'Parent' field is highlighted with a blue border.

Assign the same parent as above.

As you add these cards, the parent tax rate increases to match the sum of its children.

Chromis Administration

Category Name	In Use
Food Tax	
Standard Rate	
Tax Exempt	✓
Tax Standard	✓
Tax Zero Rated	
Parent Tax	Rate %
Food Parent	8.00
Children Taxes	Rate %
Tax 7%	7.00
Tax 1%	1.00

The final stage is to assign the Tax category to a product.

The first tax requirement has now been completed, now it time to add the tax for standard sales.

Looking at the middle of the options that can be used, indicates that another tax record of 7% would be required. Rule 2 indicates that a child can only have 1 parent.

This would result in the 2 tax elements being recorded separately, however there could be a situation where this may be required and is the only option that can be used.

Example

You are required to pay a local tax of 2% for hot food sales and 2% that for dine in service. These would need to be tracked as individual tax elements so that the taxes are paid correctly the relevant parties.

Rule 4, states *A tax record can be both a child and assigned directly to a category at the same time (In effect a parent).*

Meaning that that option can be used, which is shown be the right choice in the diagram.

Locate the 'Tax 7%', record

Name	Tax 7%
Tax Rate	7.000 %
Tax Category	Standard Rate
Parent	Food Parent

Chromis Administration

Change the 'Tax Category' to 'Standard Rate, and save the record.

The new taxes are ready to use. Below are 3 sales outputs using the above scenario.

Receipt:	0000001		
Date:	9 May 2021, 11:30:05		
Terminal:	DESKTOP-E541QL9		
Served by:	Administrator		
Item	Price	Qty	Value
CheeseBurger	£5.95	x1	£5.95
Items count:	1		
Nett of Tax:			£5.50
Taxes:			
Tax 7%	£5.51		£0.39
Tax 1%	£5.51		£0.06
Total			£5.95
Cash			£5.95
Tendered:			£5.95
Change:			£0.00
Thank You			

Receipt:	0000002		
Date:	9 May 2021, 11:30:41		
Terminal:	DESKTOP-E541QL9		
Served by:	Administrator		
Item	Price	Qty	Value
DVD	£9.95	x1	£9.95
Items count:	1		
Nett of Tax:			£9.30
Taxes:			
Tax 7%	£9.30		£0.65
Total			£9.95
Cash			£9.95
Tendered:			£9.95
Change:			£0.00
Thank You			

Chromis Administration

Receipt:	0000003		
Date:	9 May 2021, 11:31:05		
Terminal:	DESKTOP-E541QL9		
Served by:	Administrator		
<hr/>			
Item	Price	Qty	Value
CheeseBurger	£5.95	x1	£5.95
DVD	£9.95	x1	£9.95
<hr/>			
Items count: 2			
Nett of Tax:	£14.80		
Taxes:			
Tax 7%	£14.81	£1.04	
Tax 1%	£5.51	£0.06	
Total	£15.90		
Cash	£15.90		
<hr/>			
Tendered:	£15.90		
Change:	£0.00		
Thank You			

You now have the ability to create Tax options for Chromis.

Category Name	In Use
Food Tax	
Standard Tax	✓
Tax Exempt	✓
Tax Standard	✓
Tax Zero Rated	

The Tax category panel indicates if the 'Tax Category' is use by any products, while this is the case it cannot be deleted.

Tax Name	Rate %	Category Assigned To	Child Tax	Parent
Tax Exempt	0.00	Tax Exempt		
Tax Standard	20.00	Tax Standard		
Tax 7%	7.00	Standard Tax	✓	Food Parent
Tax Zero Rated	0.00			
Food Parent	8.00	Food Tax		
Tax 1%	1.00		✓	Food Parent

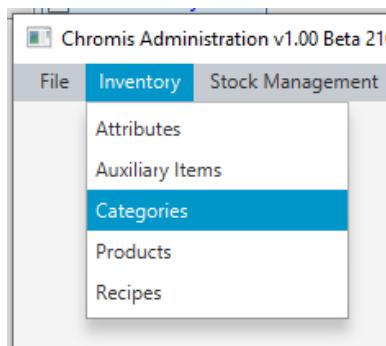
In the tax list table if the entry is in bold, it indicates that this a parent to other taxes, any tax with a parent has its parent name listed and an indicator that it is a child tax element.



Categories

Chromis Administration

Open the Categories panel 'Inventory – Categories'



What is a category?

A category is simply a way to group similar items together, this allows for better reporting etc.

Let's look at the Category panel.

You will see the now familiar icon bar containing the icon set appropriate to this panel.



Chromis has 4 default categories when initially installed.

- ***

Chromis Administration

- **General Products**
- **Gift Cards**
- **Loyalty Cards**

The above Categories (in red) cannot be deleted, but they can be renamed if required. Should you try, a warning will be displayed



System objects are also protected using other rules, in Categories they cannot have a parent.

General Details

This screenshot shows the 'General Details' configuration window. It includes fields for 'Category Name' (containing "***" and highlighted with a red border), 'Button Text' (containing "***"), 'Parent' (a dropdown menu), 'Display Order' (a dropdown menu), and an 'Age Warning' section. The 'Age Warning' section contains a toggle switch labeled 'Show an age warning when a product in this category is selected', a numeric input field set to '18' with up/down arrows, and the label 'Required Age'.

Category Name, is the name used when referring to the category in other sections of the administration application, this is the only compulsory field required for a Category record.

In the main POS there is a panel that can be used to display products in a category, the 'Is available in Category Panel' enables this function. This will create a button in the category panel with details from Button Text. If this text is not required due to a custom button being created with the details already on it, this text can be disabled. An example of when a button may not be required is, if you are using a scanner you may only want to have a limited category selection visible to the user.

This is further controlled by 'Display Order' this overrides the normal alphabetical function, this must also be enabled in the main system configuration.

A Category can be a child of another Category, selecting a parent provides this sub category function.

There is now a law in some countries that certain products cannot be sold to people below a certain age. Chromis has the ability to display a warning to the POS operator when 1 of these such products are selected. When this function is enabled, a 'Required age' must be supplied, the default is 18 with a range of 5 – 75.

Chromis Administration

Should you wish to apply and image the Category buttons in the POS application, the image editor is available.

Let's create a new Category

Select add a new record 

New Record

General Details	
Category Name	<input type="text"/>
Parent	<input type="button" value="▼"/>
Display Order	<input type="text"/>
<input type="checkbox"/> Is visible in Category panel	
<input type="checkbox"/> Show an age warning when a product in this category is selected	
18	<input type="button" value="▲"/>
Required Age	

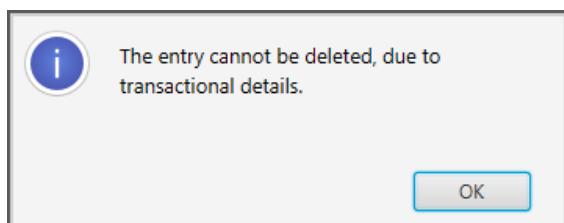
Give it the name Takeaway Food, then save it.

This should now appear in the main table.

Category Name	Parent	Display Order	Restrictions

General Products			
Gift Cards			
Loyalty Cards			
Takeaway Food			

If you attempt to delete a Category that is in use the application will show a warning and not allow it.





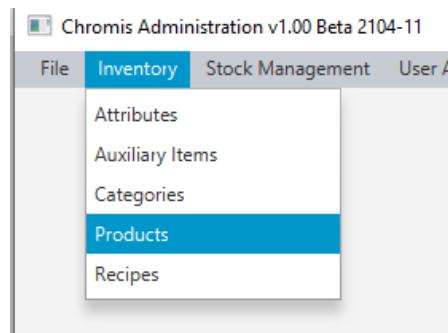
Products

Chromis Administration

Products are the main elements of any Point-of-Sale system, it is these that are actually sold.

The product panel is also the most complex of all the panels in the application, this is due the large number of configuration Options available to the system.

Open the Products panel 'Inventory – Products'



On opening it becomes apparent that this panel provides a large number of configuration options.

Reference	Barcode	Description	Category	Sell inc Tax	Sell Price	Buy Price	Ingredient	Auxiliary	
Apples	Apples	Apples	***	0.00	0.00	0.00	✓		
beans	beans	beans	General Products	0.00	0.00	0.00	✓		
bread	bread	bread	General Products	0.00	0.00	0.00	✓		
Default Product	DefaultProduct	General Product	General Products	0.00	0.00	0.00			
Eggs	Eggs	Eggs	General Products	0.00	0.00	0.00	✓		
giftcard-sale	giftcard-sale	Gift Card Sale	Gift Cards	0.00	0.00	0.00			
giftcard-topup	giftcard-topup	Gift Card Topup	Gift Cards	0.00	0.00	0.00			
Loyalty Redeem	LoyaltyRedeem	Loyalty Voucher Redeem	Loyalty Cards	0.00	0.00	0.00			
Service-Charge	ServiceCharge	Service-Charge	General Products	0.00	0.00	0.00			

Chromis has 5 default system products.

Chromis Administration

Reference	Barcode	Description	
Default Product	DefaultProduct	General Product	G
giftcard-sale	giftcard-sale	Gift Card Sale	G
giftcard-topup	giftcard-topup	Gift Card Topup	G
Loyalty Redeem	LoyaltyRedeem	Loyalty Voucher Redeem	L
Service Charge	ServiceCharge	Service Charge	G

These cannot be deleted; also, some options cannot be changed.

Let add a new product into the system,

Select add a new record 

New Product

Product Details	General Details	Product Setting	PLU & Barcodes	Pricing Tiers	Suppliers	Stock Levels	Screen B
Item Reference (SKU)				Sell Price inc Tax	0.00		
PLU (Default Barcode)				Sell Price	0.00		
Ticket Description				Cost Price	0.00		
Report Description				Gross Margin	0.00 %		
Tax Class	Food Tax			Gross Profit	0.00		
Category				Sales Commission	0.00 %		

Any compulsory fields required for product record are all located on the 'Product Details' tab.

New Product

Product Details	General Details	Product Setting	PLU & Barcodes	Pricing Tiers	Suppliers	Stock Levels	Screen B
Item Reference (SKU)	CheeseBurger			Sell Price inc Tax	0.00		
PLU (Default Barcode)	CheeseBurger			Sell Price	0.00		
Ticket Description	CheeseBurger			Cost Price	0.00		
Report Description				Gross Margin	0.00 %		
Tax Class	Food Tax			Gross Profit	0.00		
Category	Takeaway Food			Sales Commission	0.00 %		

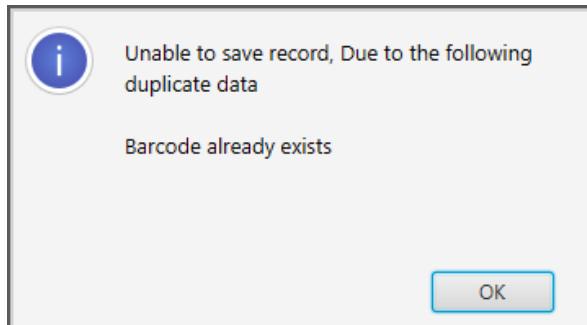
Item Reference (SKU) is your own reference for the product, this could be the supplier code or one you create.

Chromis Administration

PLU (Default Barcode) is the barcode of the product, this is usually supplied by the manufacture and should ideally be printed on the product or its wrapping, to facilitate scanning.

Ticket Description is used on the receipt when printed.

All of the above must be unique if another product with any of the above fields is detected during the save process a warning dialog will be displayed, indicating where the problem is.



All entries are case insensitive, meaning 'DVD' and 'dvd' are seen as the same item.

Every product also has a unique value that cannot be change by the user, this ensures that any internal links are maintained regardless of changes to the above fields.

Tax Class allows the selection of the correct Taxes to be applied, these are the Tax Categories covered earlier.

Category allows the product to be associated with category. All products must be associated with a category either a default or one created as in the earlier section.

Now the pricing

A screenshot of a software interface for setting product prices. It displays several input fields: "Sell Price inc Tax" with value "0.00", "Sell Price" with value "0.00" (highlighted with a red border), "Cost Price" with value "0.00" (highlighted with a red border), "Gross Margin" with value "0.00 %", "Gross Profit" with value "0.00", and "Sales Commission" with value "0.00 %".

There are only 2 compulsory field and 0.00 are permittes values.

Enter 5.95 into Sell Price inc Tax

Chromis Administration

Sell Price inc Tax	5.95
Sell Price	5.51
Cost Price	0.00
Gross Margin	0.00 %
Gross Profit	5.51
Sales Commission	0.00 %

You should notice that some of the price fields automatically updated. The 'Cost Price' should be completed where possible, as this will have an impact on profit reporting later.

Now save the record, if everything is good you should have a new record in the list

Reference	Barcode	Description	Category	Sell Inc Tax	Sell Price	Buy Price	Margin
Default Product	DefaultProduct	General Product	General Products	0.00	0.00	0.000	
giftcard-sale	giftcard-sale	Gift Card Sale	Gift Cards	0.00	0.00	0.000	
giftcard-topup	giftcard-topup	Gift Card Topup	Gift Cards	0.00	0.00	0.000	
Loyalty Redeem	LoyaltyRedeem	Loyalty Voucher Redeem	Loyalty Cards	0.00	0.00	0.000	
Service Charge	ServiceCharge	Service Charge	General Products	0.00	0.00	0.000	
CheeseBurger	CheeseBurger	CheeseBurger	Takeaway Food	5.95	5.51	0.000	

You now have the knowledge on adding new products.

Congratulations. At this stage you have enough information to setup Chromis in its most basic format for use.

Now we will look at further options available to the application. At this stage we will leave the Products panel and come back to it later in the documentation, this is to allow other areas to be configured those products use.



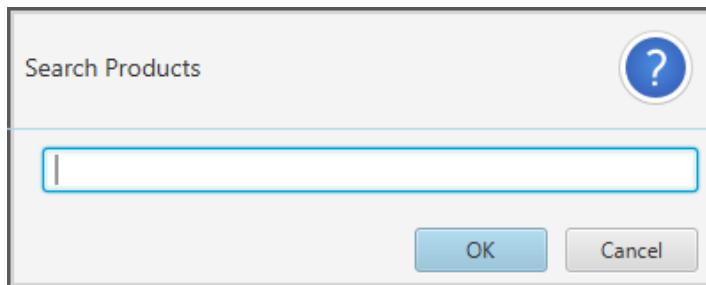
Products
Advanced Search

Chromis Administration

The search capabilities in the product extend beyond the basic search offered other administration panels.



The search function is accessed via the button, that displays the standard search dialog box.



When a string is entered and 'OK' is selected, the function looks in fields within the products table that contain the passed string. It does not search all of the fields only a small selected set.

- Name
- Reference
- Barcode
- Category
- Shortname
- Id

Whilst this will serve the most basic of searches, there may be times when a more extensive search is required.

The application provides some simple commands to search on the buy price, sell price, profit and margin areas of the product.

- pricebuy
- buyprice
- buy
- sellpriceinc (sell including tax)
- pricesellinc (sell including tax)
- pricesell (sell excluding tax)
- sellprice (sell excluding tax)
- sellinc (sell including tax)
- sell (sell excluding tax)
- profit
- margin

By using the any of the above parameters you can search to the products, the limitation is that you can only search only a single value.

Chromis Administration

Search Products 

The above search would display all products that have a buy price above 0.30.

If you wish to search for products between 0.30 & 1.45, this can be done by executing the above search. Then executing a second search without resetting the results.

Search Products 

This will then display all of the products within the price ranges required.



If you wish to reset the results at any point select , this will result in all of the products being displayed.

There are 2 further search capabilities available, these require the use to have a basic understanding of SQL queries and the fields within the products database table. (Most are shown below). It is not the intention of the document to teach sql queries.

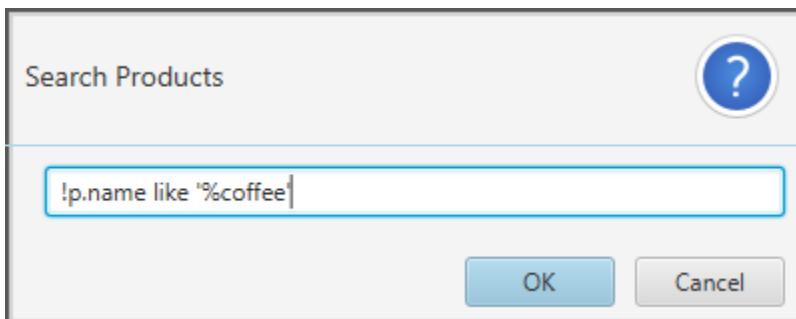
products		
<code>id</code>	<code>remoteprinter</code>	<code>remotedisplay</code>
<code>siteguid</code>	<code>isservice</code>	<code>remotedisplayid</code>
<code>reference</code>	<code>display</code>	<code>averagecost</code>
<code>code</code>	<code>attributes</code>	<code>burnvalue</code>
<code>codetype</code>	<code>isvprice</code>	<code>earnvalue</code>
<code>name</code>	<code>isverpatrib</code>	<code>loyaltymultiplier</code>
<code>pricebuy</code>	<code>warranty</code>	<code>sellunit</code>
<code>pricesell</code>	<code>image</code>	<code>stockunit</code>
<code>pricesellinc</code>	<code>alias</code>	<code>buyunit</code>
<code>category</code>	<code>alwaysavailable</code>	<code>agerestricted</code>
<code>taxcat</code>	<code>candiscount</code>	<code>isrecipe</code>
<code>attributeaset_id</code>	<code>iscatalog</code>	<code>isingredient</code>
<code>iscom</code>	<code>catorder</code>	<code>retired</code>
<code>isscale</code>	<code>managestock</code>	
<code>iskitchen</code>	<code>commission</code>	

Chromis Administration

Reference	Barcode	Description	Category	S
504	504	Iced Coffee	Coffee	
527	527	Small Coffee Milk	Milks	
528	528	Large Coffee Milk	Milks	
506	506	Greek Nescafe Frappe	Coffee	
502	502	Large Hot Coffee	Coffee	
501	501	Small Hot Coffee	Coffee	

If we have a database that contains 6 products that are coffee related and a standard search is performed with the word 'coffee'. All of the products related to coffee will be returned, it can be seen that one of the products is returned due the Category being 'coffee'.

The first of the advanced searches allow for a SQL query to be passed and allows for the use of sql instructions. These searches must start with '!', this search appends into the main query the string passed.



Due the nature of the base query where the products table is aliased as p, all of the field names should be prefixed with 'p.'

The above query would return the following

Reference	Barcode	Description	Category	S
504	504	Iced Coffee	Coffee	
502	502	Large Hot Coffee	Coffee	
501	501	Small Hot Coffee	Coffee	

The base query used in this search function is

```
select
    p.id,
    reference,
    code,
    p.name,
    alias,
    c.name,
```

Chromis Administration

```
pricesell,  
pricebuy,  
pricesellinc,  
isingredient,  
iscom  
from  
products as p  
join categories as c on p.category=c.id  
where  
PassedsearchStr  
and retired=false  
and p.siteguid = 'xxxxxx' (siteguid for the database)  
order by reference
```

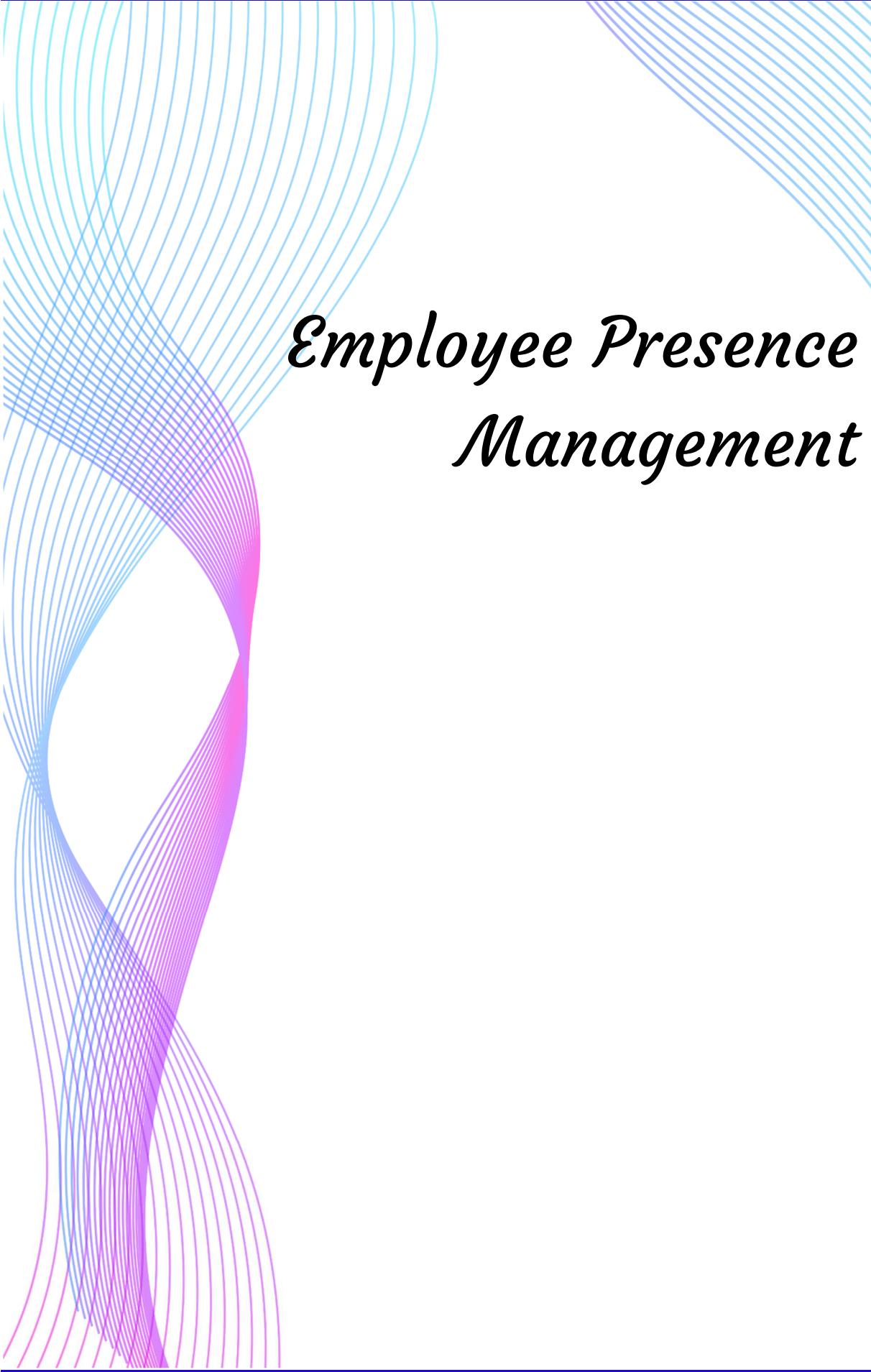
The other advanced search starts the string '\$'

This allows for the same sql query commands to be used but the base string has no predefined elements to the where clause.

```
select  
p.id,  
reference,  
code,  
p.name,  
alias,  
c.name,  
pricesell,  
pricebuy,  
pricesellinc,  
isingredient,  
iscom  
from  
products as p  
join categories as c on p.category=c.id  
where  
PassedsearchStr
```

The fields returned via both searches are this required to populate the products table.

During the normal use it highly unlikely the advance searches will be needed.



Employee Presence Management

Chromis Administration

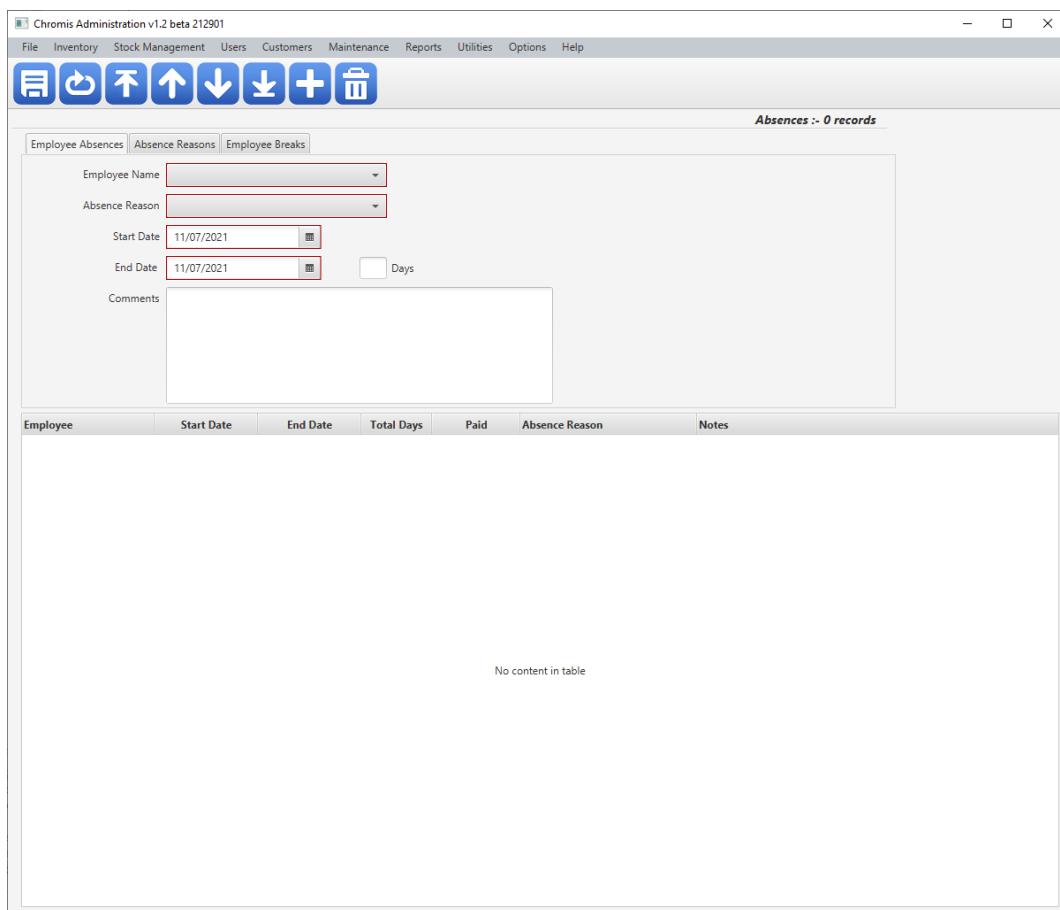
Chromis allows the recording of user breaks and absences, via its 'Employee Presence Management' option.

An employee can clock in and out for the shifts from the Point-of-Sale screen, there is also the ability to record user breaks during a normal shift.

A user with the correct access rights can also record all absence details for employees, these can include sickness and holidays.

Configuring and using Employee Presence Management

Open the 'Employee Presence Management' panel 'Users – Employee Presence Management'



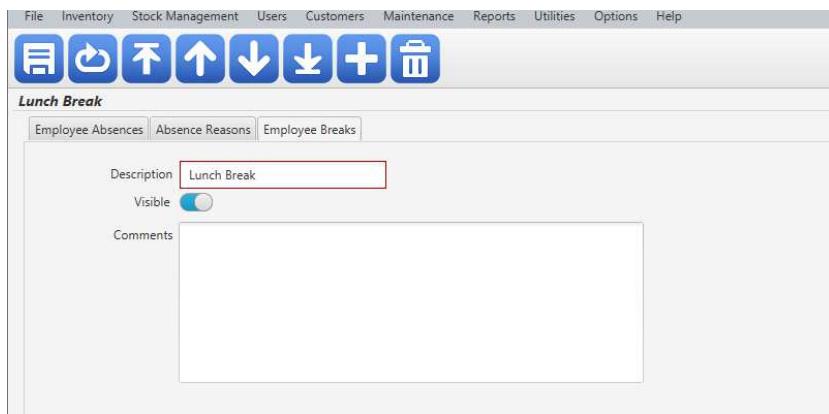
The panel consist of 3 sections, 2 of which are only available to users with administrator level access.

- Absence Reasons
- Employee Breaks

Employee Breaks

Chromis Administration

Let's start with 'Employee Breaks'



By default, Chromis has 3 built-in break types, these are not system objects and can be removed or changed if required.

It is these breaks that are displayed on the POS when a user selects the time clock section.

A break record has very few options

- Name
 - This is the information displayed in the timeclock
 - All break names must be unique
- Visible
 - If the break is displayed in the timeclock
- Comments
 - This is just comments, if required and not used for the timeclock

Breaks records cannot be deleted once they have been used by an employee in the timeclock, they can be renamed.

Chromis Administration

Absence Reasons

The screenshot shows the Chromis Administration software interface. At the top, there is a menu bar with links to File, Inventory, Stock Management, Users, Customers, Maintenance, Reports, Utilities, Options, and Help. Below the menu is a toolbar with several icons: a document, a circular arrow, a downward arrow, an upward arrow, a plus sign, and a trash can. The main area is titled "Annual Leave Paid" and contains three tabs: "Employee Absences", "Absence Reasons" (which is selected and highlighted in red), and "Employee Breaks". Under the "Absence Reasons" tab, there is a section for "Absence Reason" with a dropdown menu showing "Annual Leave Paid". A "Paid Absence" toggle switch is shown as being turned on. Below this, a table lists absence reasons and their paid status:

Absence Reasons	Paid
Annual Leave Paid	✓
Annual Leave unPaid	✓
Sickness Paid	✓
Sickness UnPaid	✓

By default, Chromis has 4 built-in absence reason, these are not system objects and can be removed or changed if required.

It is these reasons that are used when an entry is recreated for an employee's absence

An absence reason record only has 2 fields

- Absence Reason
 - This is the information displayed in the Employee Absence details
 - All reason names must be unique
- Paid Absence
 - If the employee is paid when this reason is selected.

Absence Reason records cannot be deleted while they are used by for an employee absence record , they can be renamed.

Chromis Administration

Employee Absences

The screenshot shows the 'Annual Leave Paid' section of the Chromis Administration software. At the top, there is a menu bar with links to File, Inventory, Stock Management, Users, Customers, Maintenance, Reports, Utilities, Options, and Help. Below the menu is a toolbar with icons for back, forward, search, and other functions. The main area is titled 'Annual Leave Paid' and contains three tabs: 'Employee Absences' (selected), 'Absence Reasons', and 'Employee Breaks'. The 'Employee Absences' tab has fields for Employee Name (dropdown), Absence Reason (dropdown), Start Date (text input with calendar icon), End Date (text input with calendar icon), and Total Days (checkbox). There is also a Comments text area and a Days field. At the bottom, there is a table header with columns: Employee, Start Date, End Date, Total Days, Paid, Absence Reason, and Notes.

It is on this screen that an employee's absence record is created.

An absence record consists of the following fields

- Employee Name
 - This is selected from a drop list of all users on the system
- Absence Reason
 - This is selected from the absence reasons created in 'Absence Reasons' screen.
- Start Date
 - The start date of the absence, this is effectively 00:00:01 of the date selected
- End Date
 - The end date of the absence, this is effectively 23:59:59 of the date selected.
- Comments
 - Any comments you wish to record for the absence

Apart from the user completed options, there is a Days field, this is calculated and cannot be changed by the user.

It uses the start and end dates to calculate the number of days the absence period is for; it is a full week calculation so weekends are classed as absence days. It is important to be aware of this.

When calculating the days and absence if for use the effective start and end times for this process, this means a start and end date which are the same is calculated as 1 day.

When creating an entry, the dates are validated using the following rules

- Date in the past
- Start date later than end date
- End date earlier than start date
- Invalid date entry

Some of the rules are also validated at the moment the record is saved.

Chromis Administration

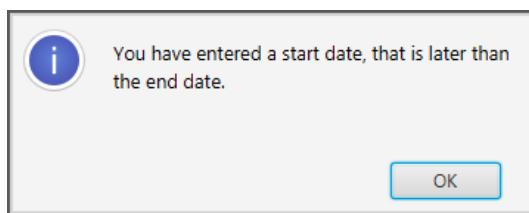
Date in the past

In the event that a date old than the system date is entered as warning is shown



This does not prevent the recording of a past absence, there may be situations where this is necessary. It just an FYI (for your information) message.

Start Date later than end date



At this stage this is still and FYI at this point as it assumes you have not yet completed the entry.

End date earlier than start date



At this stage this is still and FYI at this point as it assumes you have not yet completed the entry.

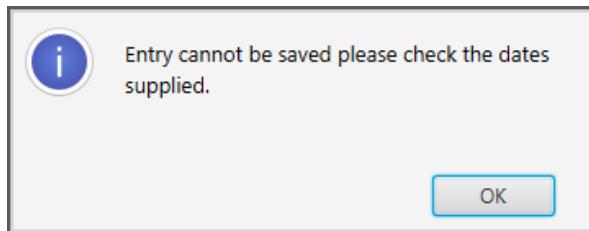
Invalid date entry



If at any time an invalid date is entered a warning is shown and the date resets the that prior to the attempted change.

Chromis Administration

When the record is saved, the start and end dates are rechecked to ensure that the rules are met, if there is an issue the record is not saved and an information dialog is displayed.



If the rules are not broken the record is saved.

A screenshot of the Chromis Administration software interface. The top navigation bar includes tabs for "Administrator" (selected), "Employee Absences" (highlighted in red), "Absence Reasons", and "Employee Breaks". On the right, a smaller window titled "Absence" is visible. The main form displays fields for "Employee Name" (Administrator), "Absence Reason" (Annual Leave Paid), "Start Date" (22/05/2021), "End Date" (04/06/2021), and a "Comments" text area. A summary table below shows the entered data: Employee (Administrator), Start Date (22/05/2021), End Date (04/06/2021), Total Days (14), Paid (checkmark), Absence Reason (Annual Leave Paid), and Notes (empty).

Employee	Start Date	End Date	Total Days	Paid	Absence Reason	Notes
Administrator	22/05/2021	04/06/2021	14	✓	Annual Leave Paid	



Attributes

Chromis Administration

In this section will take a look at Attributes. What an Attribute is and how to configure them.

What is an Attribute?

An attribute is a property that can be applied to a product.

If we consider a product named '*Steak*', when the customer orders a '*Steak*' you may ask them 'How would you like cooked?'. The customer decides that they would like to '*Steak*' well done. 'Well done' is an attribute for the product in this instance.

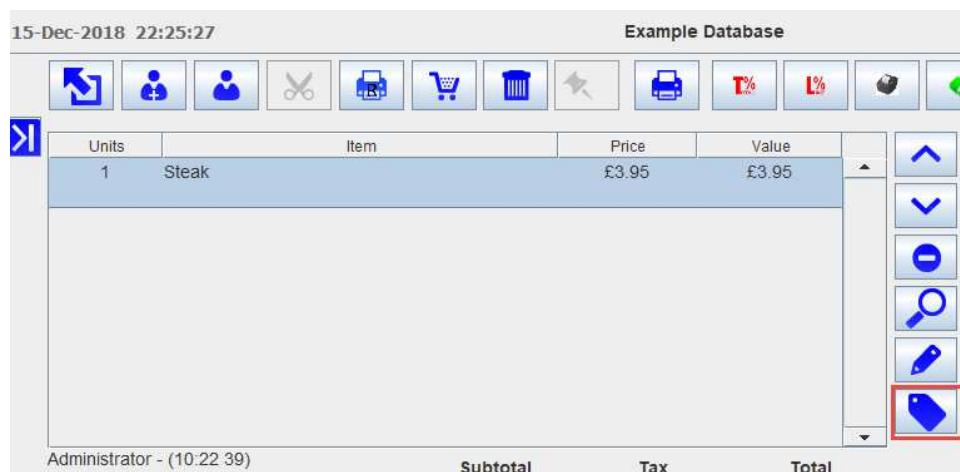
You could of course create a number of products

- Steak – Rare
- Steak – Well done
- Steak – Medium

This would become very difficult to manage once the number of products increase which require an attribute. This is where attributes in Chromis come to the assistance.

How to configure Attributes

Before we start to look at configuring attributes, we need to understand how they work within Chromis. So let us consider it actually in use.



If we continue to use '*Steak*' as our example, in the above screen we can see our product. In the bottom right corner (highlighted) we have the attribute button. When activate the button we get the attribute dialog option.

Chromis Administration

COOK	<input type="text"/>	<table border="1"><tr><td>CE</td><td>-</td></tr><tr><td>7^P_{RS}</td><td>8^T_{UV}</td><td>9^W_{YZ}</td></tr><tr><td>4^G_{HI}</td><td>5^J_{KL}</td><td>6^M_{NO}</td></tr><tr><td>1</td><td>2^A_{BC}</td><td>3^D_{EFG}</td></tr><tr><td colspan="2">0</td><td>.</td></tr></table>	CE	-	7 ^P _{RS}	8 ^T _{UV}	9 ^W _{YZ}	4 ^G _{HI}	5 ^J _{KL}	6 ^M _{NO}	1	2 ^A _{BC}	3 ^D _{EFG}	0		.
CE	-															
7 ^P _{RS}	8 ^T _{UV}	9 ^W _{YZ}														
4 ^G _{HI}	5 ^J _{KL}	6 ^M _{NO}														
1	2 ^A _{BC}	3 ^D _{EFG}														
0		.														
MUSTARD	<input type="text"/>															
RELISH	<input type="text"/>															
ONION CHOPPED	<input type="text"/>															
KETCHUP	<input type="text"/>															
STEWED ONIONS	<input type="text"/>															
PEPPERS	<input type="text"/>															

OK Cancel

These are the current attributes that we have associated with the product 'Steak'. We can associate a number of attributes to a product.

When we use the drop down options for 'Cook' we are presented with the attributes on how we want the 'Steak' to be prepared.

COOK	<input type="text"/>
MUSTARD	<input type="text"/>
RELISH	<input type="text"/>

MEDIUM
WELL
RARE

Once the attributes are selected, they are displayed in the ticket panel and printed on any receipts.

15-Dec-2018 22:37:37 Example Database

1	Units	Item	Price	Value								
1	Steak	MEDIUM, EXTRA CHOP, ONION, EXTRA	£3.95	£3.95								

Administrator - (10:22 39) Subtotal Tax Total

Chromis can also be configured to automatically display the Attribute panel for a product, whenever the product is selected for sale.

So now that you can see how the attributes are used, you need now to understand they work with the application.

Chromis Administration

Attribute Structure

There are 3 components required for the attributes

- Attribute Sets
 - an attribute set is the element of the attributes that the products directly interact with
- Attributes
 - These are the attributes themselves, as we can see in the above example cook, they can be combined in to an attribute set to make up the choices required. The same attribute can be used in multiple attribute sets.
- Attribute Values
 - These are the values that are available for each attribute.

Attribute Set		Attributes		Attribute Values	
Name		Name	Line no	Name	
COFFEE		COFFEE TYPE	1	REGULAR	
				LIGHT	
				DARK	
				BLACK	

In the above we can see that there is an attribute set 'COFFEE'

This attribute set currently has a single attribute associated with it 'COFFEE TYPE'

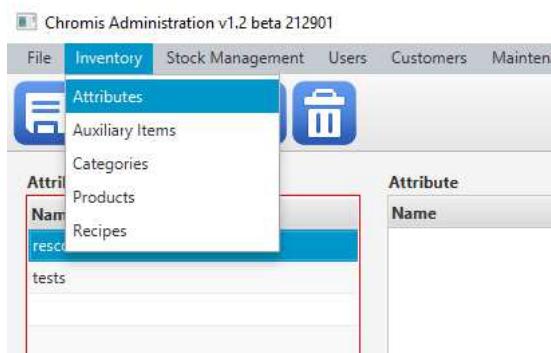
The attribute has 4 values 'REGULAR', 'LIGHT', 'DARK' and 'BLACK'

It is these attributes set that we tell the product to use in Chromis. To inform the application to use the products needs to be pointed to the set to use. This will be covered when we revisit the Product panel later.

An attribute Set can consist of a number of Attributes each which have their own values.

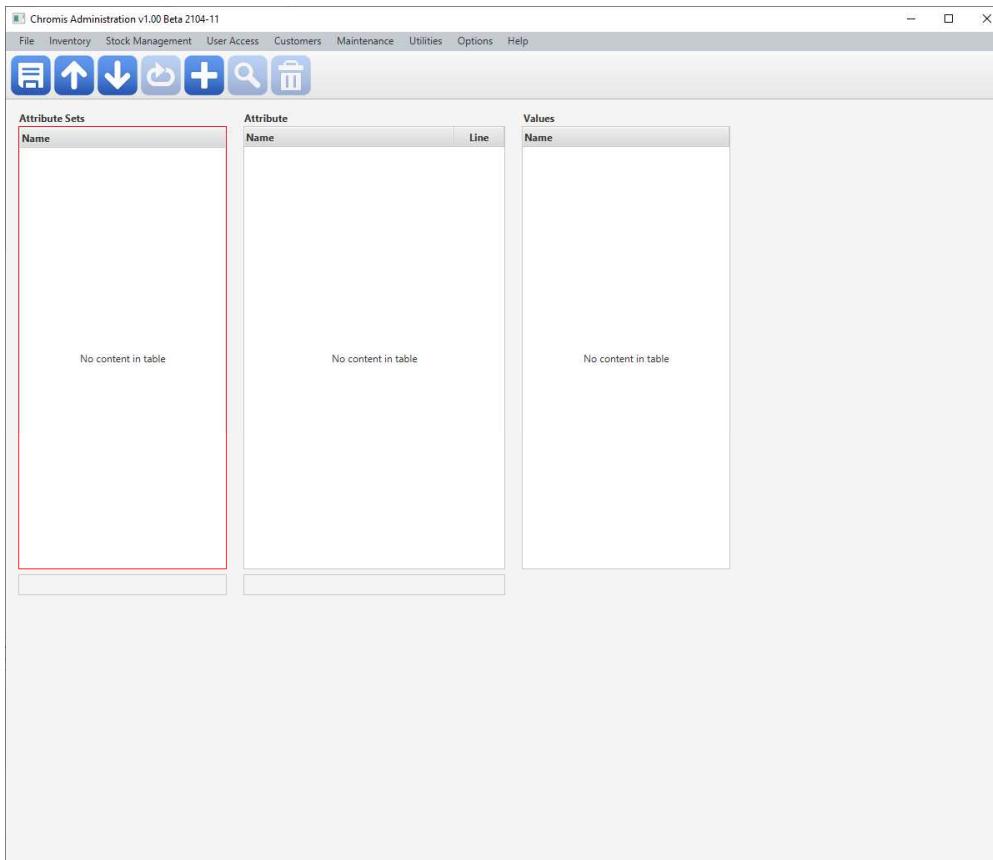
Configuring Attributes

Open the Attributes panel 'Inventory – Attributes'



Chromis Administration

Chromis has no default attributes



The main screen consists of 3 panels

- Attribute Sets
- Attribute
- Values

The currently active panel is indicated, with a red border, this is relevant when using the icons to add a new record.

Scenario

One of the products sold is a Steak meal, as part of the meal the customer can make the following choices

- How the steak is cooked
- What sauce is required
- Chips or Potatoes

Of course, there could a lot more options if required, but remember the more options the long it takes to sell the product.

Chromis Administration

Let begin to create the required attributes to meet the scenario

Ensure that the panel 'Attribute Sets' and select add new record icon , or right click in the panel and select 'Add New Set'



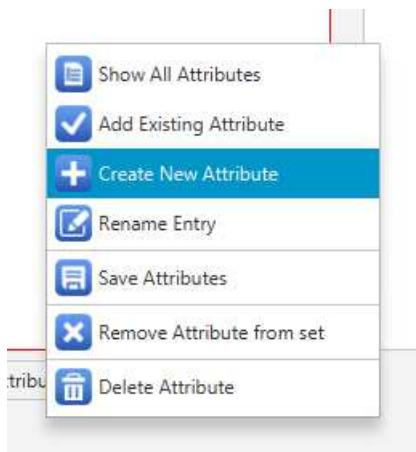
Call 'Steak Meal'

Save the record using the main Icon bar or right click in the panel and select 'Save Sets'

Lets now create the attributes

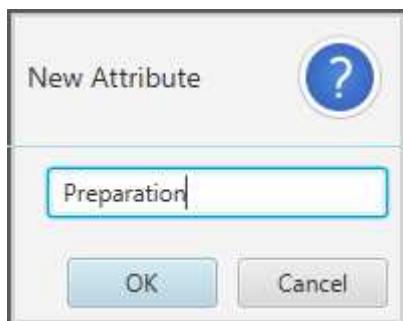
Select the 'Attribute' panel and add a new record, either using the icon bar or right clicking in the panel and selecting 'Create New Attribute'

There are a lot of options in the context menu, these will be covered shortly



Call the new Attribute Preparation.

Chromis Administration



Repeat creating new Attributes with the following names



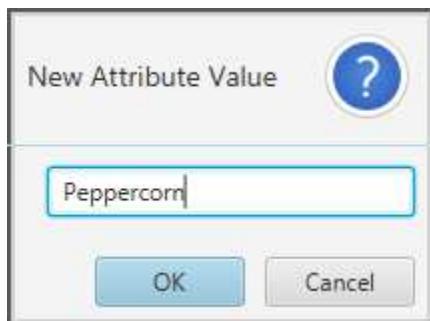
The screen should reflect these new option

Attribute Sets		Attribute	
Name		Name	Line
Steak Meal		Preparation	
		Sauce	
		Potatoes	

Save the records.

Finally, the values need to be added. Select 'Sauce' then highlight the 'Values' Panel. Add an new value using the same options as above icon bar or right click.

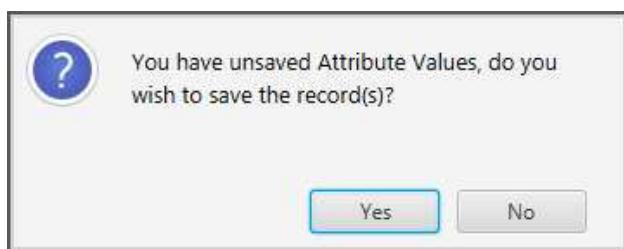
Chromis Administration



Repeat the above adding the following

- Whiskey Cream
- Red Wine
- Mustard Cream

Select the Attribute panel again. If the values were not saved the option to save them will be displayed



Save the values.

Next select Potatoes and add the following values

- Chipped
- Mashed
- Boiled

Save the records.

Now, the final Attribute 'Preparation', and add the following values.

- Rare
- Medium-Rare
- Medium
- Well Done

Depending upon which Attribute is selected the screen will look similar to the 1 below

Chromis Administration

Attribute Sets		Attribute	Values
Name		Name	
Steak Meal		Sauce	
		Potatoes	Red Wine
		Preparation	Peppercorn
			Whiskey Cream
			Mustard Cream

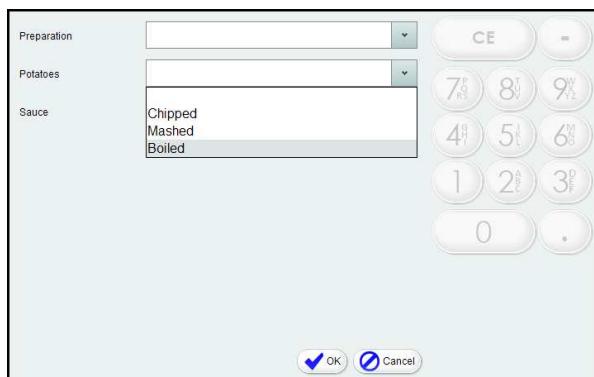
Once these are applied to the product, in POS this is how they will appear.

Preparation	<input type="text"/>	CE	-
Potatoes	<input type="text"/>	7 ^P _{R₂}	8 ^T _{V₂}
Sauce	<input type="text"/>	4 ^G _{I₁}	5 ^L _{K₁}
		1	2 ^D _{P₂}
		0	3 ^D _{F₂}
			.
		<input checked="" type="button"/> OK	<input type="button"/> Cancel

Preparation	<input type="text"/>	CE	=
Potatoes	<input type="text"/>	7 ^P _{R₂}	8 ^T _{V₂}
Sauce	<input type="text"/>	4 ^G _{I₁}	5 ^L _{K₁}
		1	2 ^D _{P₂}
		0	3 ^D _{F₂}
			.
		<input checked="" type="button"/> OK	<input type="button"/> Cancel

Preparation	<input type="text"/>	CE	-
Potatoes	<input type="text"/>	7 ^P _{R₂}	8 ^T _{V₂}
Sauce	<input type="text"/>	4 ^G _{I₁}	5 ^L _{K₁}
		1	2 ^D _{P₂}
		0	3 ^D _{F₂}
			.
		<input checked="" type="button"/> OK	<input type="button"/> Cancel

Chromis Administration



Item	Item Price (Inc tax)	Q
Steak Medium-Rare, Chipped, Peppercorn	£13.95	x1

Let's now look at other options in the panel, to assist with this another set of Attributes have been added

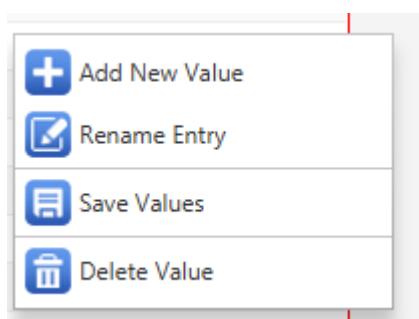
Attribute Sets	Attribute	Values
Name	Name	Name
Coffee	Sauce	Red Wine
Steak Meal	Potatoes	Peppercorn
	Preparation	Whiskey Cream
		Mustard Cream

Selecting different lines in different panels changes what is shown on the screen. In the above there are 2 'Attribute Sets'.

When a set is selected the attributes associated with it are shown in the Attribute panel. Moving to the Attribute panel there a column 'Line' this allows the order the Attributes are displayed in on the POS system.

Any of the records can be edited by double clicking the entry, this allows the line to be set.

Taking a further look at the context menu shows that all of the panels have the same basic options relevant to the panel.

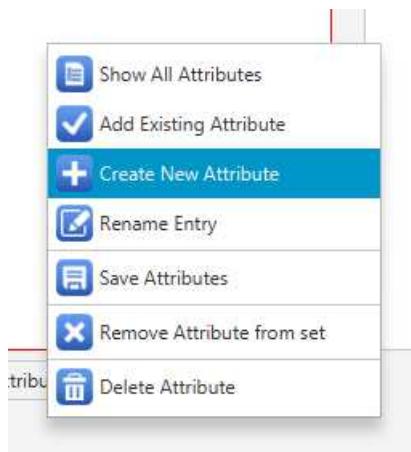


Chromis Administration

- Add new record
- Rename
- Save
- Delete

However, the Attribute panel has more options

- Show all Attributes
- Add Existing Attribute
- Remove Attribute from set



Selecting 'Show all Attributes' we list all of the attributes in the system. It also indicates if the attribute is associated with any sets.

Available Attributes	
Attribute	In Use
Preparation	✓
Latte	✓
Potatoes	✓
House Special	✓
Expresso	✓
Sauce	✓

At the bottom of the table are two buttons: 'Delete Attribute' and 'Exit'.

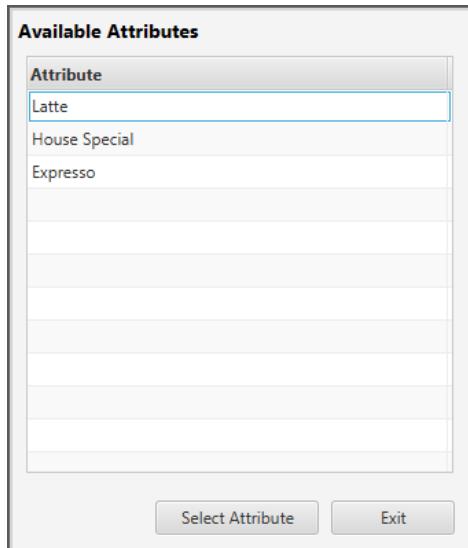
Attributes can be deleted from the system using this panel if required. Select the Attribute and 'Delete Attribute' button

Chromis Administration



If the Attribute is in use, it cannot be deleted.

The next option 'Add Existing Attribute', will display a list of all Attributes in the system that can be added to the Attribute Set, but excludes those already in it.

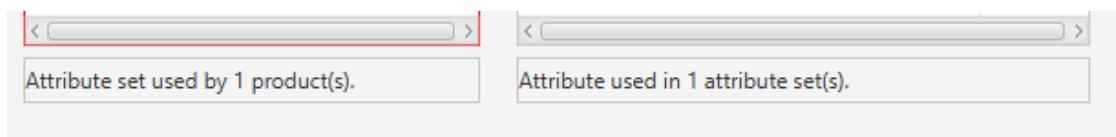


To add 1 of the Attribute, select it and click 'Select Attribute', this shows that an Attribute is not limited to a single Attribute Set. Attribute values stay with the Attribute, so removing a value from an Attribute in one Attribute Set removes it from them all.

If you have selected an Attribute and then 'Remove Attribute from set' the Attribute is removed from the current Attribute Set only, it does not delete the Attribute.

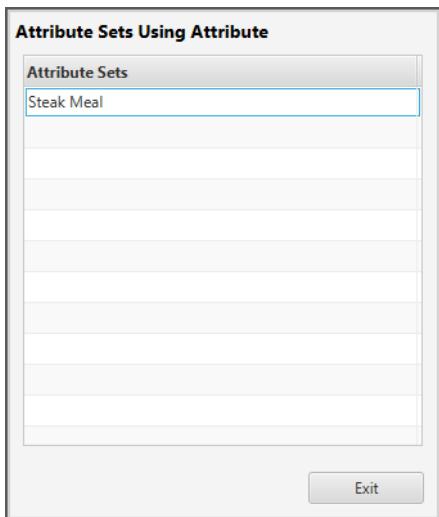
When a rename is attempted Chromis checks for a duplicate entry in the system.

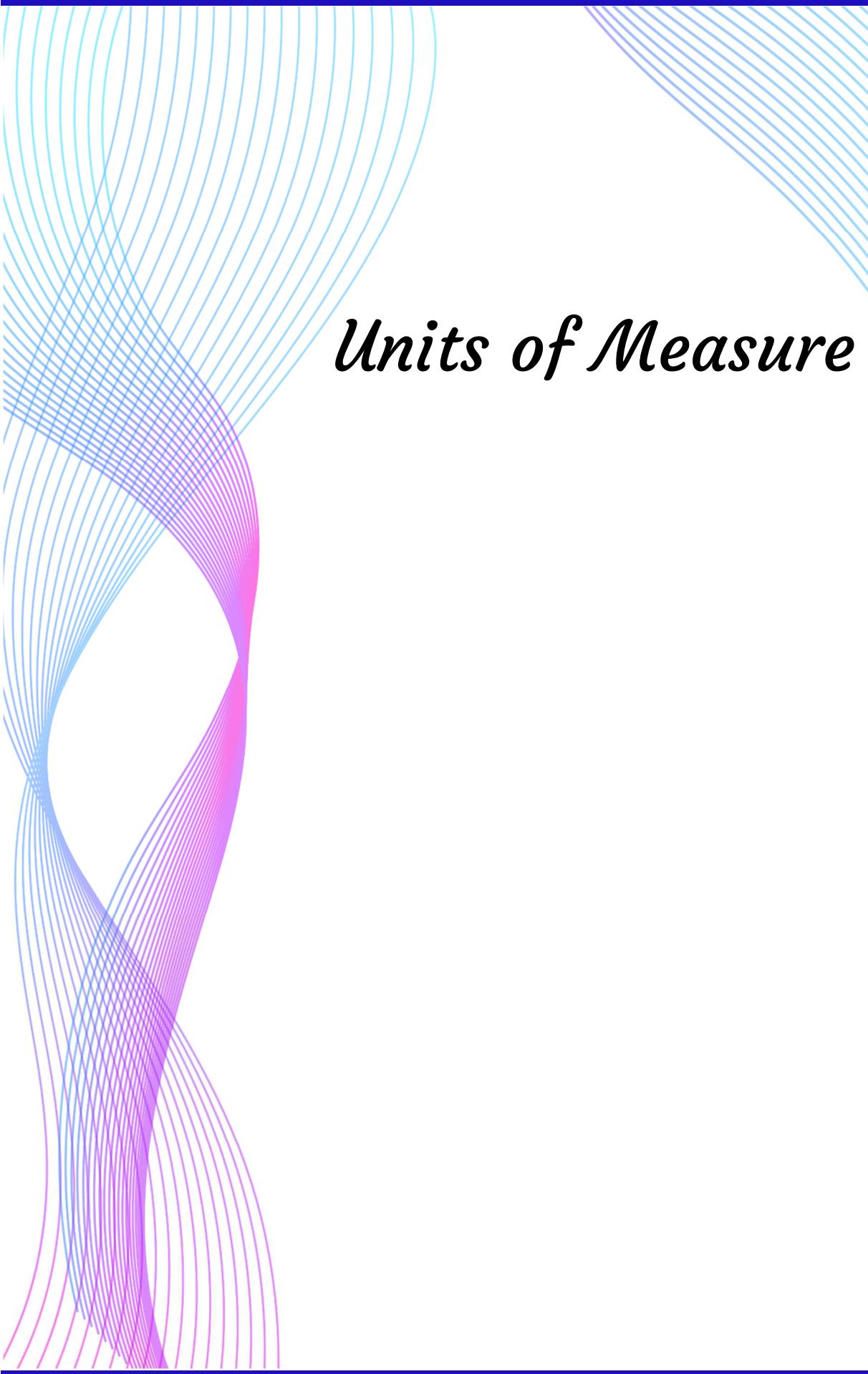
Below the panel is a status line



This show details about the select entry in the panel above it, clicking any of these shows a list relating to the selected record.

Chromis Administration





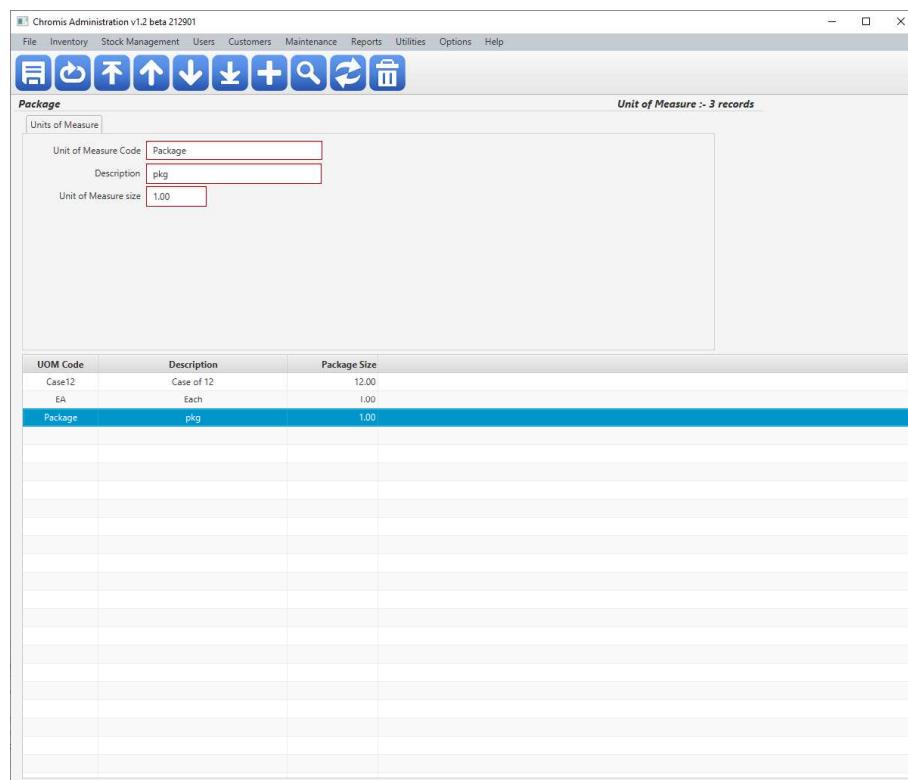
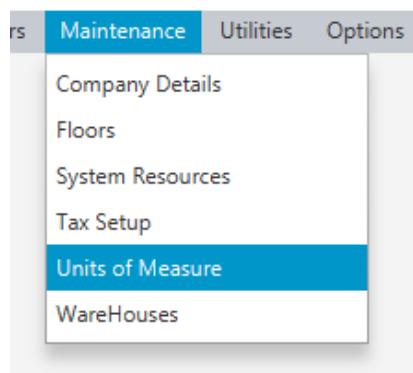
Units of Measure

Chromis Administration

What are Units of Measure?

The ‘Units of measure’ are terms that give meaning to the quantities. For example, a supplier delivers its product in outer boxes of 12 single units. The unit of measure in this case could be a dozen, or a box of 12.

Open the Unit of Measure panel 'Maintenance – Units of Measure'



The UOM panel is 1 of the simplest used by Chromis it is basically a translation table of terms to quantity.

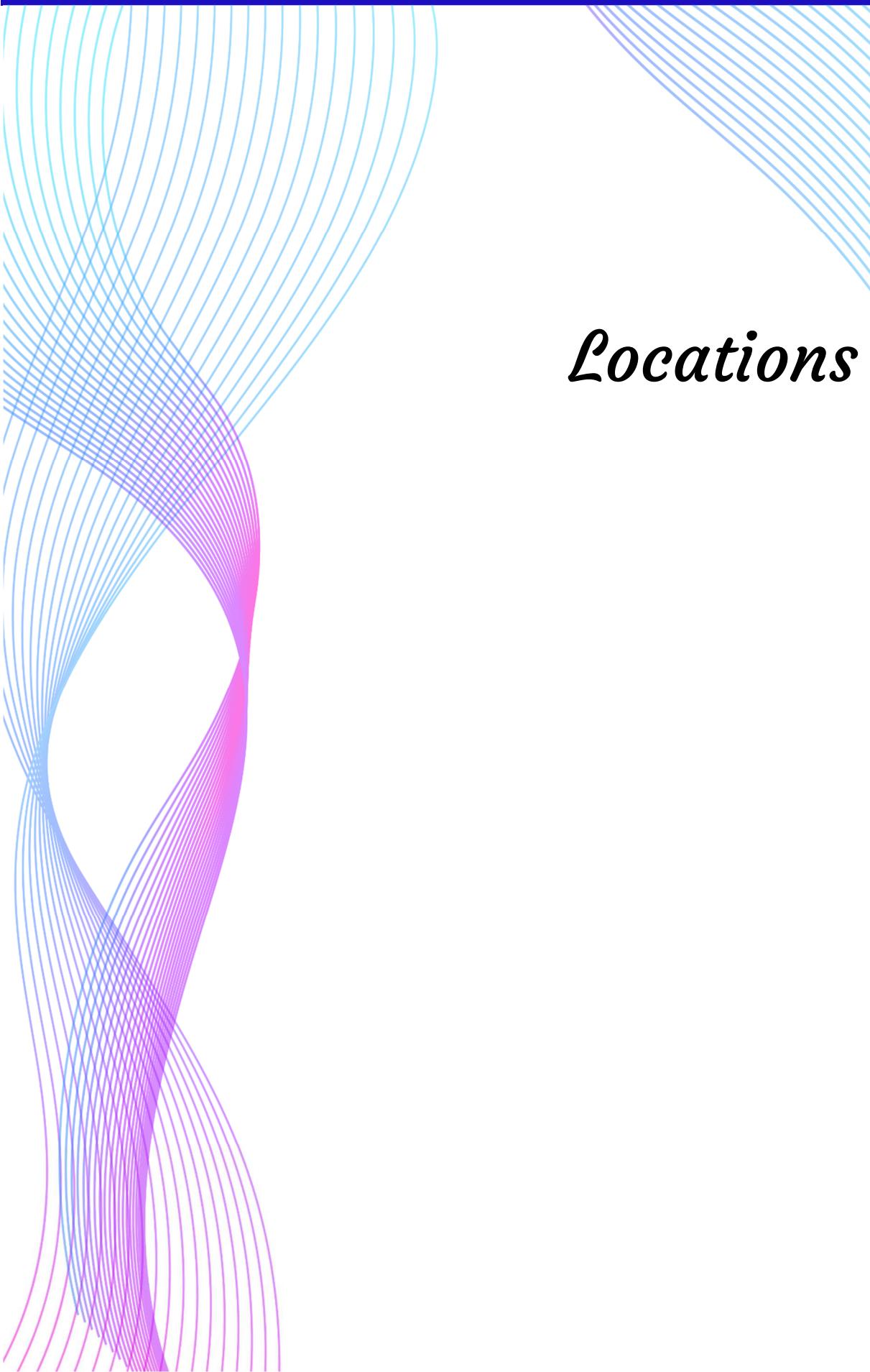
Chromis Administration

Case12

Units of Measure	
Unit of Measure Code	Case12
Description	Case of 12
Unit of Measure size	12.00

Creating a new record only requires 3 fields

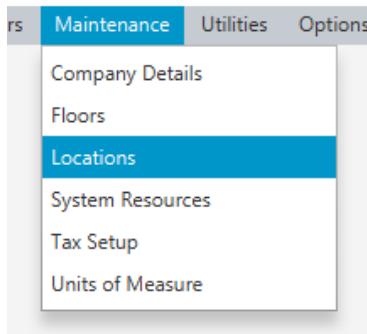
- UOM code
- Description
- Quantity in the UOM



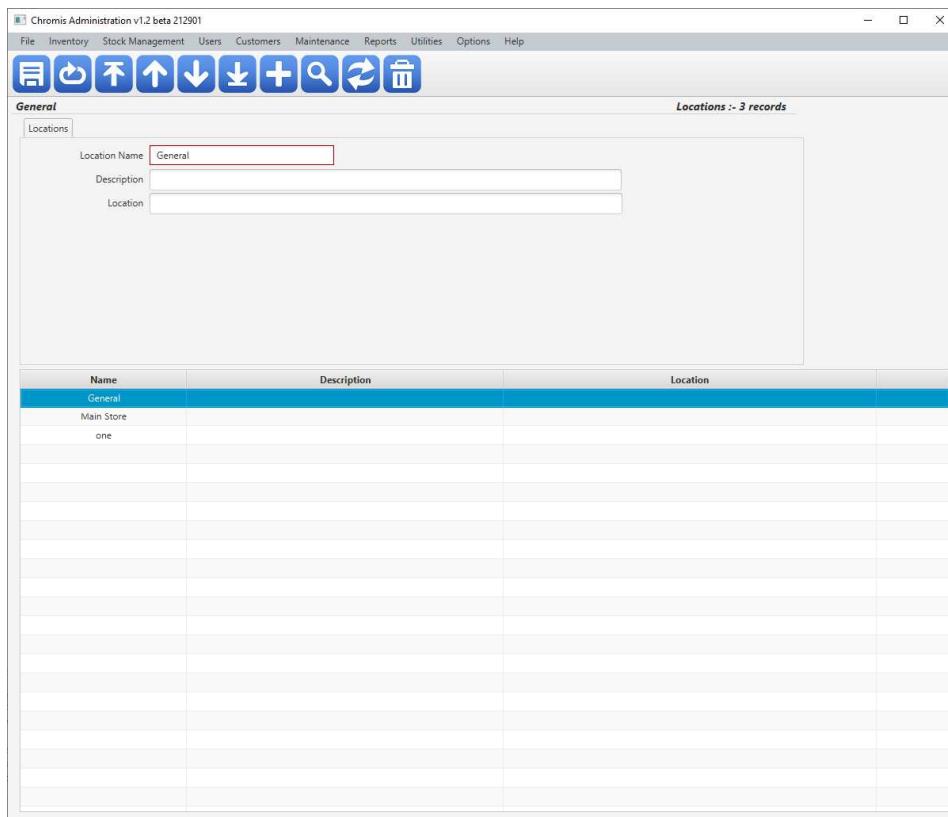
Locations

Chromis Administration

Open Locations ‘Maintenance – Locations’



The location panel is a list of locations used by the Chromis.



A location only requires a Location Name for a record to be saved.

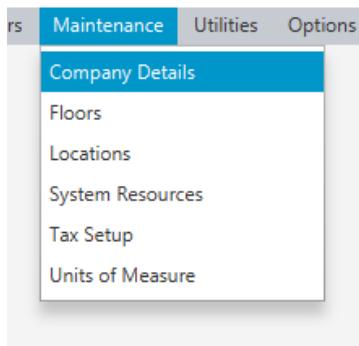
When a POS terminal is created it needs to know its location, which is used in stock logging. By default, it will always use ‘Main Store’. If the terminal is located in a different location, they need to be created in administration first and then reconfigured using the Terminal Setup application.



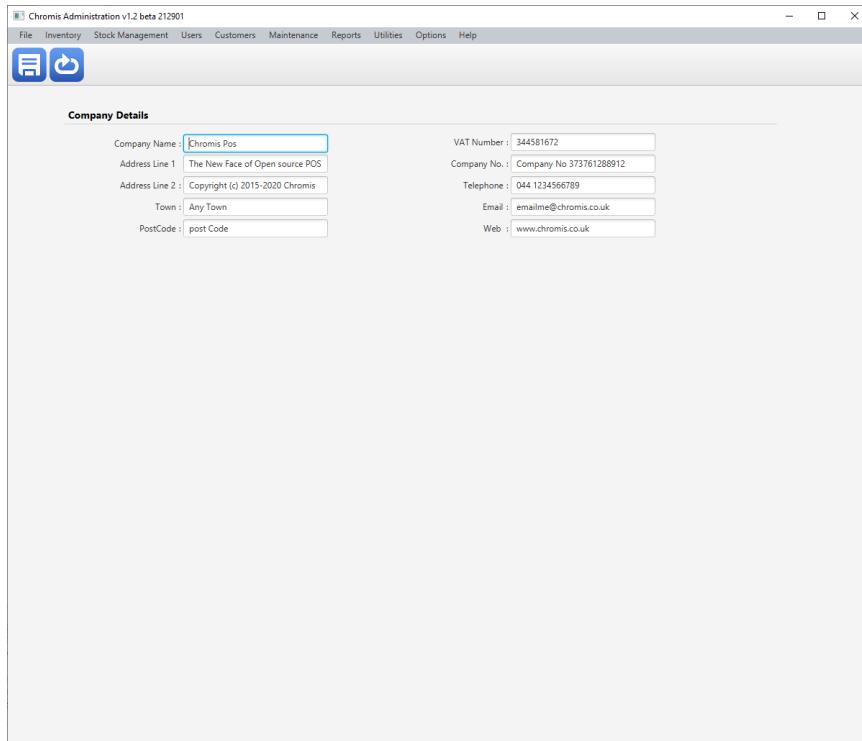
Company Details

Chromis Administration

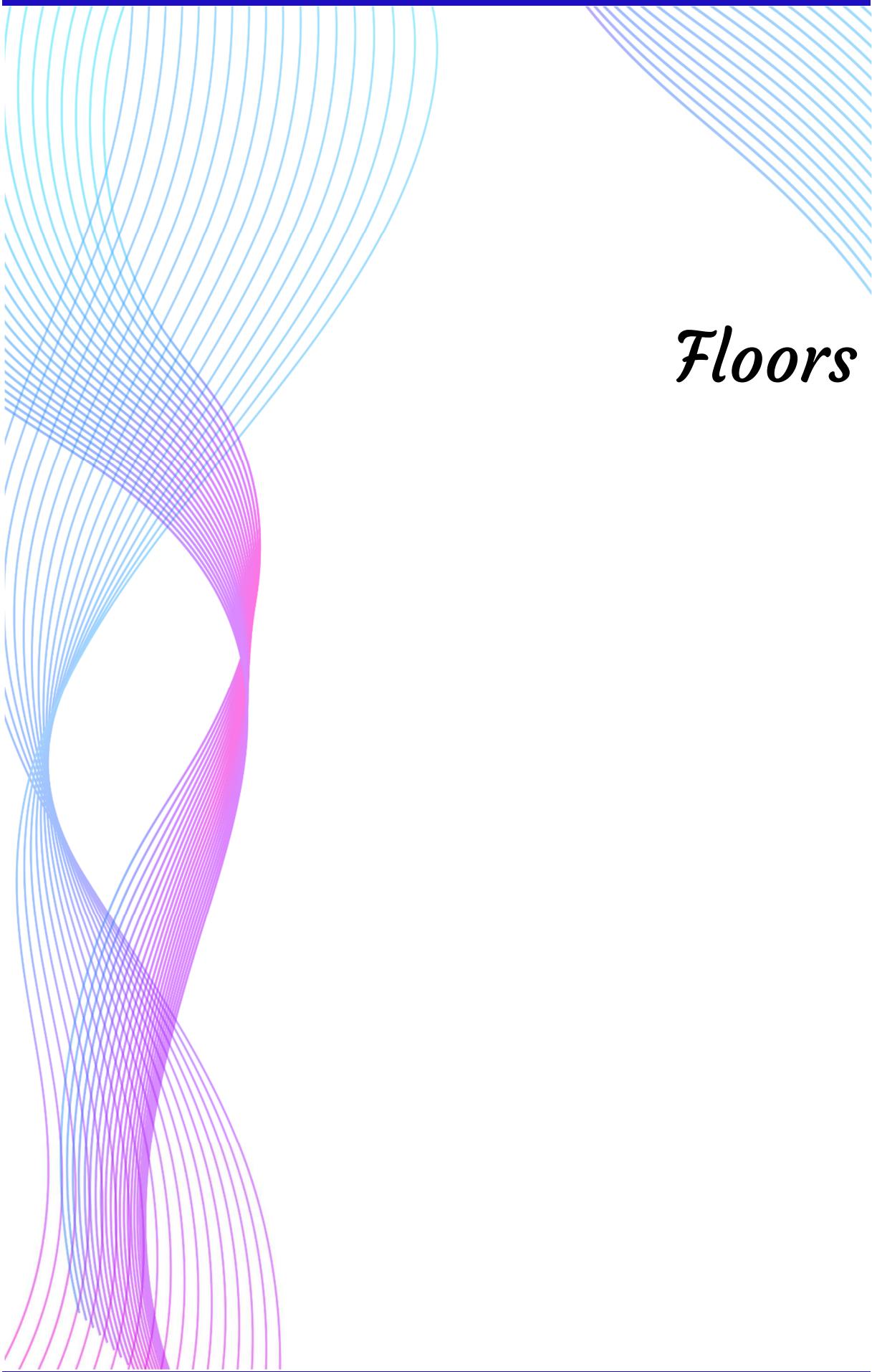
To open the panel 'Maintenance – Company Details'



This panel hold the details about the company



This will provide details used by other parts of the application.

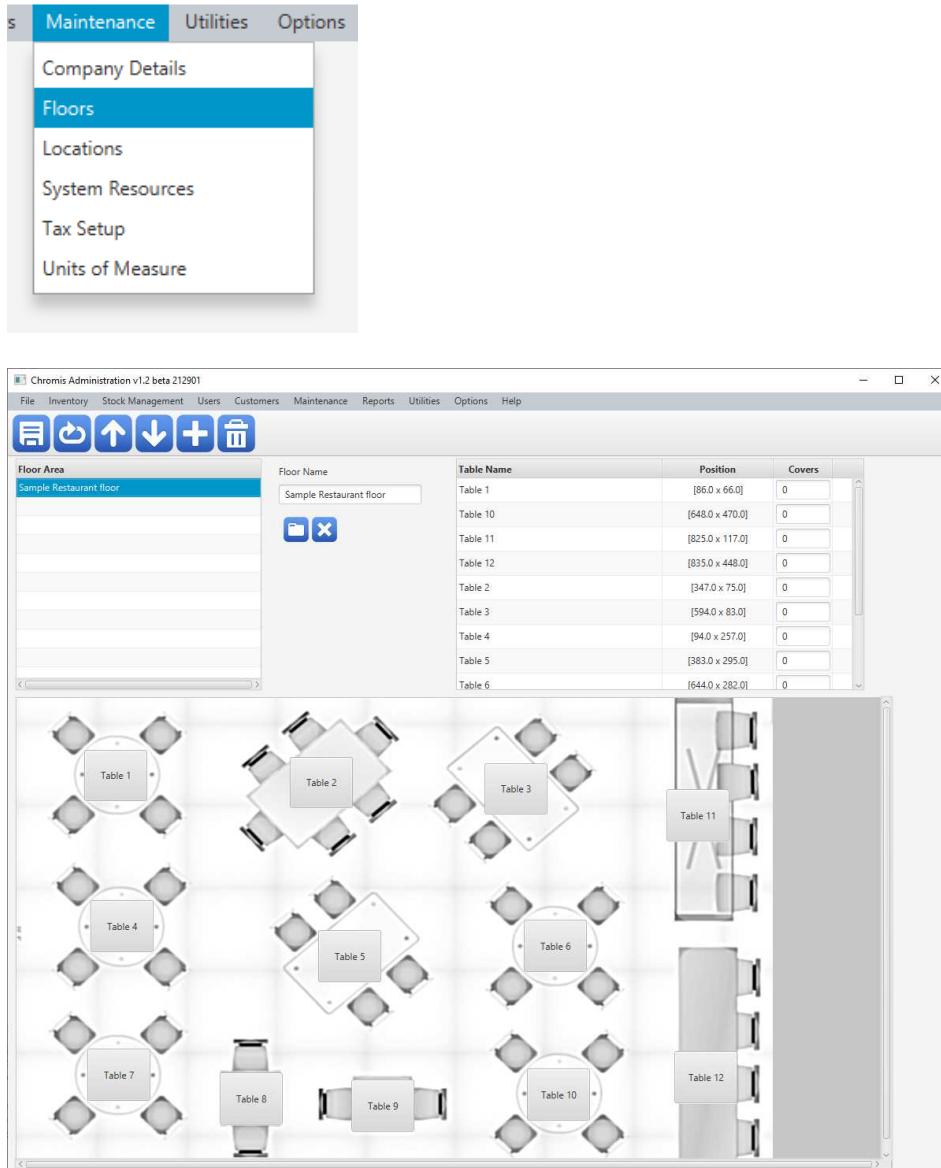


Floors

Chromis Administration

When Chromis is operated in Restaurant mode, a floor plan is required to provide a seating plan. Chromis is supplied with and example plan.

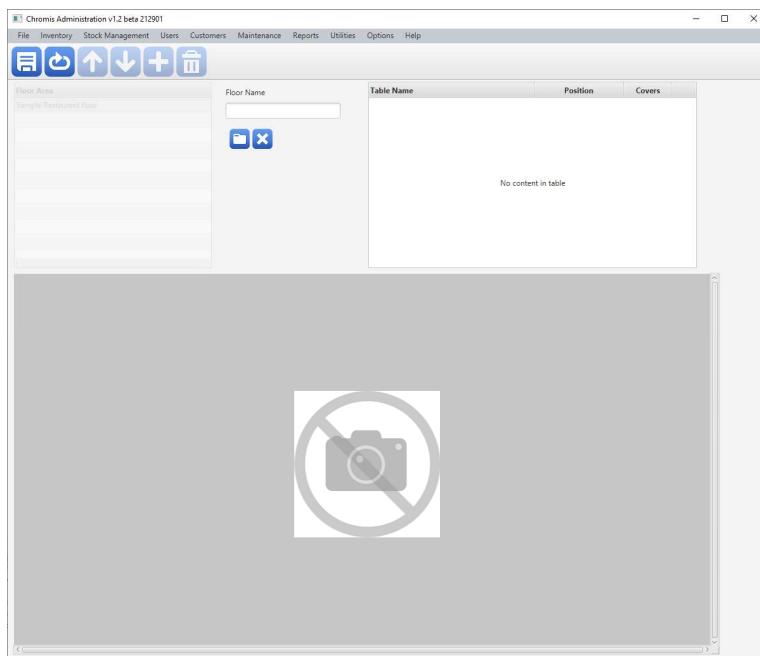
Open the Floors panel 'Maintenance – Floors'



The example image is 960 x 600 pixels.

To create a new floor select add new record from the icon bar.

Chromis Administration



Assign a name to the new floor.

Next the base graphic to be used is loaded into the main area of the panel. Use the icons under the Floor Name



Opens file explorer to load an image into the layout



Removes the image from the layout

Using the file explorer locate and select the image to use.

Once loaded everything is ready to start placing the tables. Tables are added right clicking on the graphic.

Right click on the graphic and enter the name for the new table.

Chromis Administration



A button will appear on the graphic, close to where you click on it, also an entry will appear the tables list with its position in the graphic.

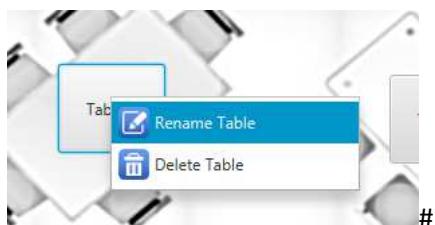


Table Name	Position	Covers
Table 1	[82.0 x 64.0]	10
Table 10	[648.0 x 470.0]	25
Table 11	[825.0 x 117.0]	0
Table 12	[835.0 x 448.0]	0
Table 2	[346.0 x 82.0]	0
Table 3	[594.0 x 83.0]	0
Table 4	[94.0 x 257.0]	0
Table 5	[383.0 x 295.0]	0
Table 6	[644.0 x 282.0]	0

The entries in this list cannot be manually edited (except the Covers), it is updated when the button is relocated.

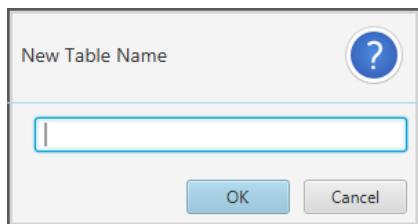
The button can be relocated by clicking and dragging it to the required location on the graphic.

Right-clicking on a button allows the table to be deleted or renamed.

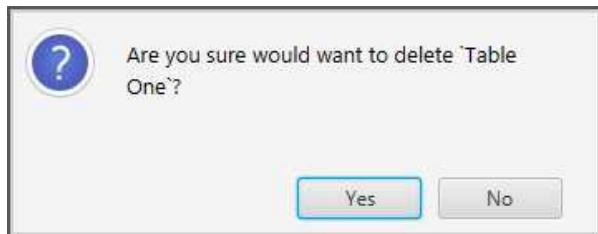


Chromis Administration

Renaming



Deleting.



Continue the steps until the layout is complete, then save it. The floor is now ready for use.

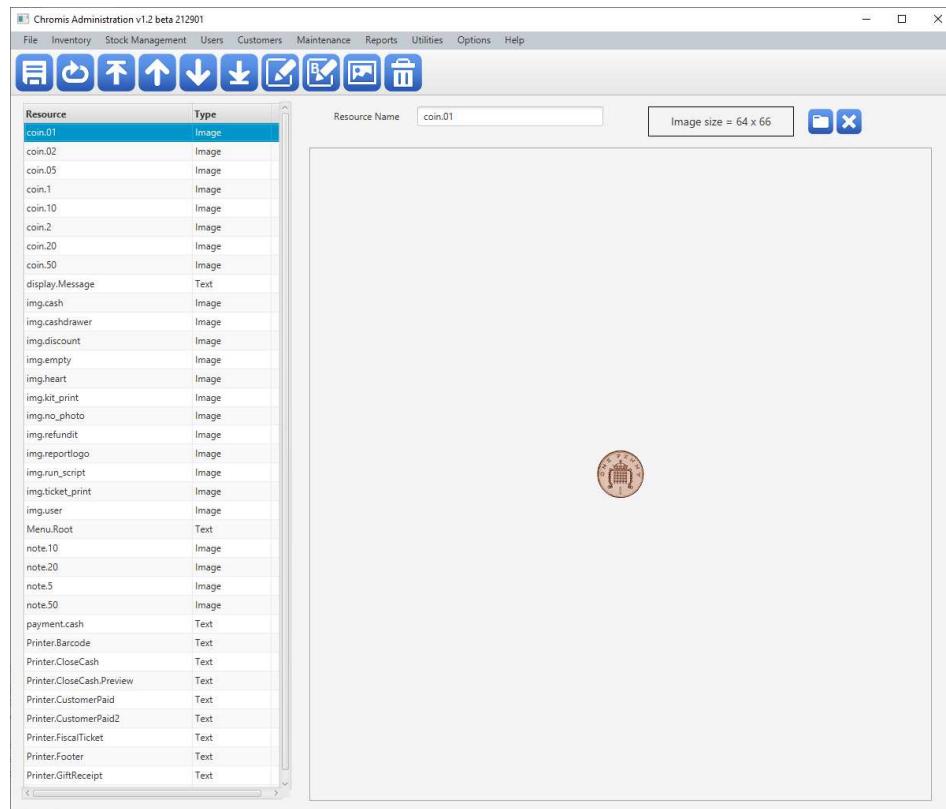
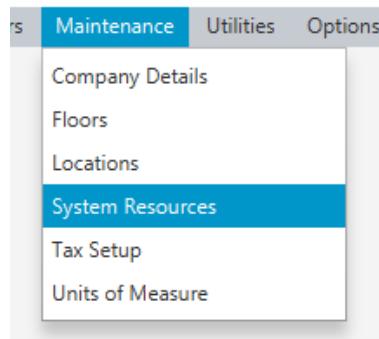


System Resources

Chromis Administration

The System resources holds all of the scripts, image etc used by the application.

Open the System Resources panel ‘Maintenance – System Resources’



It is recommended that you are careful in this area of the application if you feel unsure of what you are doing.

There are 3 types of resources

- Image
- Text
- Binary

Chromis Administration

Text and binary are basically the same and the difference relates to the way they are saved in the database.

There are 3 new actions in the icon bar.



Create a new text resource

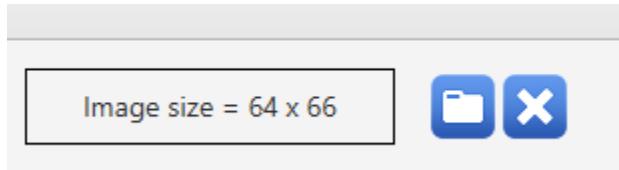


Create a new binary resource



Create a new image resource

If an image resource is selected the image size is shown in the top right corner



Opens file explorer to load an image into the resource



Removes the image from the resource

Included are the scripts which define the ticket layout, custom buttons etc, The use of these scripts is outside the scope of this document.



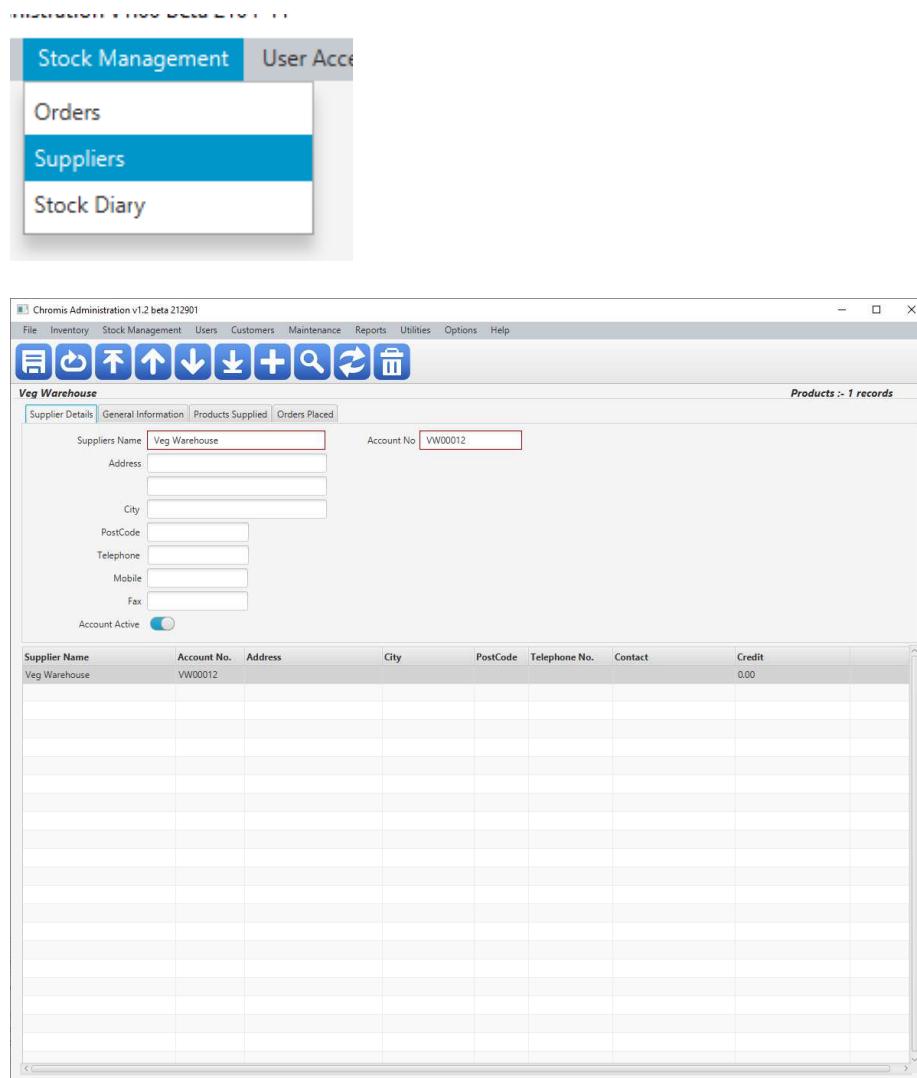
Chromis Administration

Chromis has the ability to support suppliers, this function provides the capability in the system to raise orders.

To make full use of the supplier options 2 steps are required

1. Create a supplier record
2. Associate products with the supplier, this is done from the product panel.

Open the Supplier panel 'Stock Management – Suppliers'



The supplier panel consists of 4 tabs

- Supplier Details
- General Information
- Products Supplied
- Orders placed

Chromis Administration

To create an active supplier only 2 items of information are required, the supplier's name and an account number, once they are supplied the supplier can be used.

Let's create a supplier select create a new record from the icon bar.

The form is titled 'Label' and has tabs for 'Supplier Details', 'General Information', 'Products Supplied', and 'Orders Placed'. The 'Supplier Details' tab is selected. It contains fields for Suppliers Name ('The Wholesaler'), Account No. ('JL10001'), Address, City, PostCode, Telephone, Mobile, Fax, and Account Active (a toggle switch which is active). Below the form is a table with columns: Supplier Name, Account No., Address, City, PostCode, Telephone No., and Contact Person.

Once the 2 compulsory fields are entered and saved the supplier is ready.

When products have been linked to the supplier they will appear on 'Products Supplied' tab

The table is titled 'The Wholesaler' and shows 'Suppliers :- 1 records'. It has tabs for 'Supplier Details', 'General Information', 'Products Supplied', and 'Orders Placed'. The 'Products Supplied' tab is selected. It displays a single row for 'CheeseBurger' with columns: Product, Supplier Code, Pack Size, Unit of Measure, Order, Order Qty, and Pack Cost. A 'Create Order' button is visible on the right.

Product	Supplier Code	Pack Size	Unit of Measure	Order	Order Qty	Pack Cost
CheeseBurger	CB0001	12.0	Case of 12	<input type="checkbox"/>	1	12.36

Once there are products linked to the supplier, an order can be created.

The form is titled 'The Wholesaler' and has tabs for 'Supplier Details', 'General Information', 'Products Supplied', and 'Orders Placed'. The 'Supplier Details' tab is selected. It displays the same data as the previous screenshot, including the product record for 'CheeseBurger'. The 'Order' column for the first row now contains a checked checkbox, and the 'Order Qty' field is set to '10'.

To order check the order check box in the product line, enter the quantity you wish to order and the pack cost.

When have completed the items you wish to order click 'Create Order'

Chromis Administration

Purchase Order	123255	Shipping	4.95
Name	Chromis Pos.	Name	
Invoice Address	The New Face of Open source POS	Delivery Address (if different to Invoice)	
	Copyright (c) 2015-2020 Chromis		
	Any Town		
PostCode	post Code	PostCode	
Telephone	044 1234566789	Telephone	
Comments			
<input type="button" value="Create Order"/> <input type="button" value="Cancel"/>			

Complete the order details by providing a purchase order number and any other details. When ready click 'Create Order', The order must be unique and will be checked against the system.

After a few second the order will appear on the screen

Zoom :		Page : 1		
Chromis Pos		Date 12/07/2021		
The New Face of Open source		PURCHASE ORDER 495		
Copyright (c) 2015-2020		This P.O number must appear on all related correspondence, shipping papers and invoices.		
Any Town				
post Code				
To :	Veg Warehouse	Deliver to :		
		Chromis Pos		
		The New Face of Open source POS		
		Copyright (c) 2015-2020 Chromis		
		Any Town		
		post Code		
Qty	Stock Code	Unit Size	Description	Unit Cost
100	Apples	Each	Apples	1.00
				0.0%
				100.00
				Sub Total
				100.00
				Tax
				0.00
				Shipping
				0.00
				Total
				100.00



Print the order

Chromis Administration



Save the order

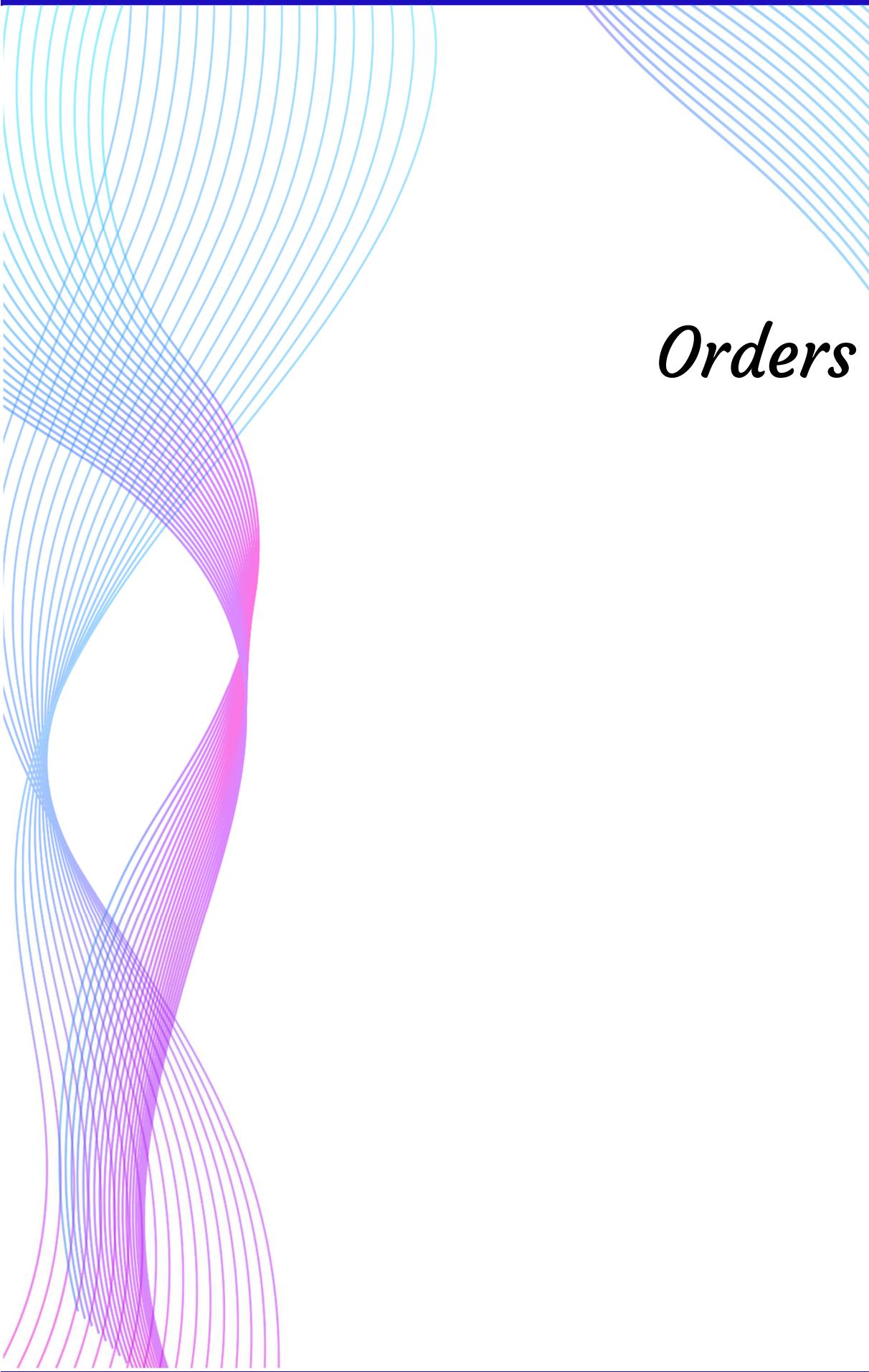


Exit order screen

The remaining tab 'Orders Placed' shows all orders placed to this selected supplier and their status.

The Wholesaler						
Supplier Details	General Information	Products Supplied	Orders Placed			
PO Number	Date	Ordered By	Order Status	Received	Invoice No.	Order Total
1223131	09/05/2021	administrator	pending			138.44
121212	09/05/2021	administrator	pending			137.44
1223255	09/05/2021	administrator	pending			138.44

Order receipting is done from the Order panel.



Orders

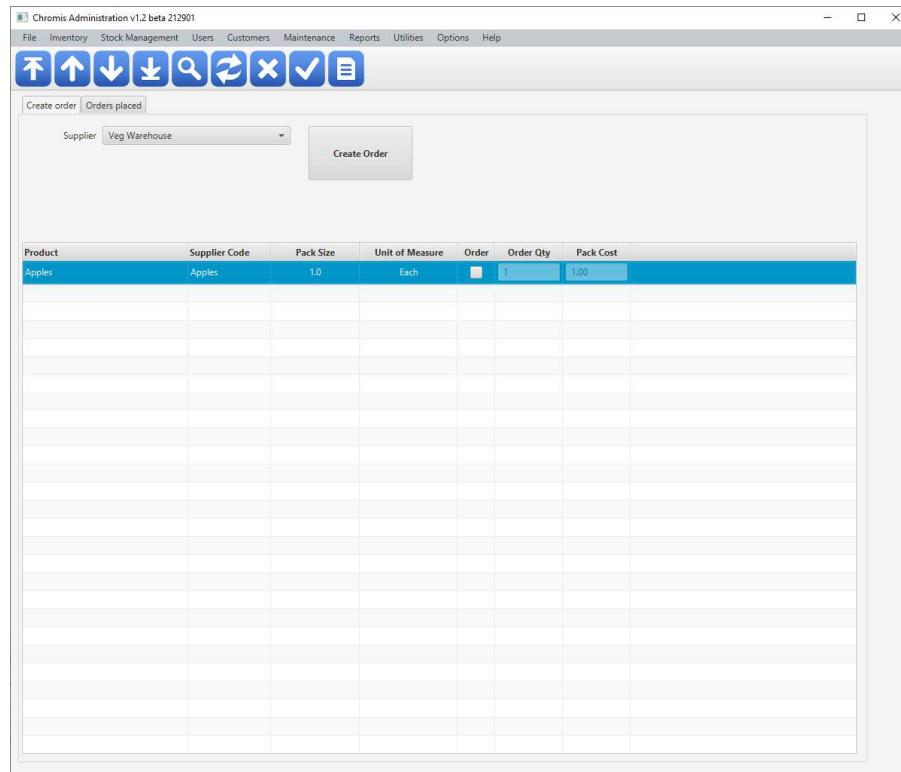
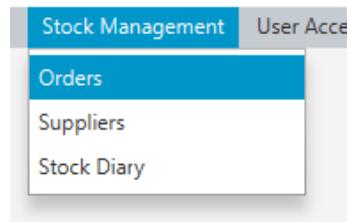
Chromis Administration

The orders panel provide 2 functions

- Creation of orders
- Receipt of orders

Open the Orders panel 'Stock Management – Orders'

inistration v1.00 Beta 2104-11



The create order tab allows an order to be created using the same steps as used in the suppliers panel. This will not be covered again in this section.

The other tab is used to receipt orders into the system.

Chromis Administration

The screenshot shows the 'Orders placed' screen in the Chromis Administration software. At the top, there is a menu bar with links to File, Inventory, Stock Management, Users, Customers, Maintenance, Reports, Utilities, Options, and Help. Below the menu is a toolbar with various icons for file operations like Open, Save, Print, and Search. A navigation bar at the top left includes 'Create order' and 'Orders placed'. Below this are two dropdown filters: 'Supplier' set to 'All' and 'Order Status' set to 'All'. The main area displays a table of orders with columns: PO Number, Supplier, Date, Ordered By, Order Status, Received, Invoice No., and Order Total. Two rows of data are visible:

PO Number	Supplier	Date	Ordered By	Order Status	Received	Invoice No.	Order Total
32324324	Veg Warehouse	10/07/2021	Administrator	Pending			0.00
495	Veg Warehouse	12/07/2021	Administrator	Pending			100.00

The screen shows a list of all orders in the system, these can be filtered by supplier or found using the search option.

There are 3 new actions in the icon bar.

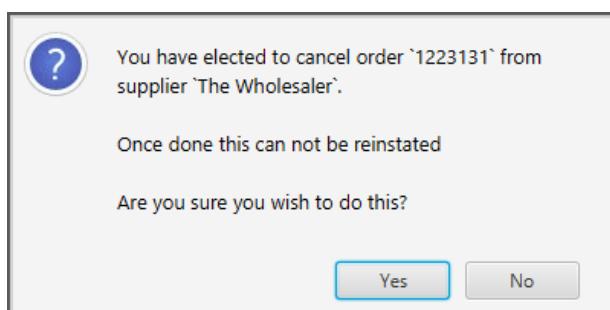


Cancel the order

Receipt the order

Display the order

To cancel any order, select the order to be canceled and select the 'Cancel' icon



This action needs to be confirmed as a final safety step.

To receipt an order select it and select the 'Receipt' icon.

Chromis Administration

Supplier	The Wholesaler	Delivery\Invoice No				
Purchase Order	1223131	Receipt Date	09/05/2021			
Order Date	09/05/2021	Deliver To	Main Store			
Ordered By	administrator	Receipt Order				
Shipping	4.95	Exit				
Product	Supplier Code	Pack Size	Unit of Measure	Order Qty	Qty Received	Pack Cost
CheeseBurger	CB0001	12.0	Case of 12	10.0	10.0	12.36

The order that is to be receipted is displayed. A delivery note or invoice number should be entered into 'Delivery\Invoice No' field, if neither of these are available a reference such as the date could be entered.

The location to which the order should be delivered to is selected.

If there is any difference from the order placed to that received the order can be update in this screen.

Once all details have been checked\Entered click 'Receipt Order' If there are any issues a warning will be displayed otherwise



The final stage of the order receipt is the updating of the current stock holding with the stock received from the order.

To view any of the orders, select it in the list and click the 'Display' icon .

Chromis Administration

Zoom : Page : 1

Chromis Pos
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Copyright (c) 2015-2020
Any Town
post Code

Date 10/07/2021
Purchase Order 32324324
This number must appear on all related correspondence, shipping papers and invoices.

RECEIVED

To :
Veg Warehouse

Deliver to :
Chromis Pos
The New Face of Open source POS
Copyright (c) 2015-2020 Chromis
Any Town
post Code

Qty	Stock Code	Unit Size	Description	Unit Cost	Tax Rate	Total	
100	erererer	Each	213213123	0.00	0.0%	0.00	
						Sub Total	0.00
						Tax	0.00
						Shipping	0.00
						Total	0.00

Page : 1 of 1

Zoom : Page : 1

Chromis Pos
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Any Town
post Code

Date 12/07/2021
Purchase Order 495
This P.O number must appear on all related correspondence, shipping papers and invoices.

CANCELLED

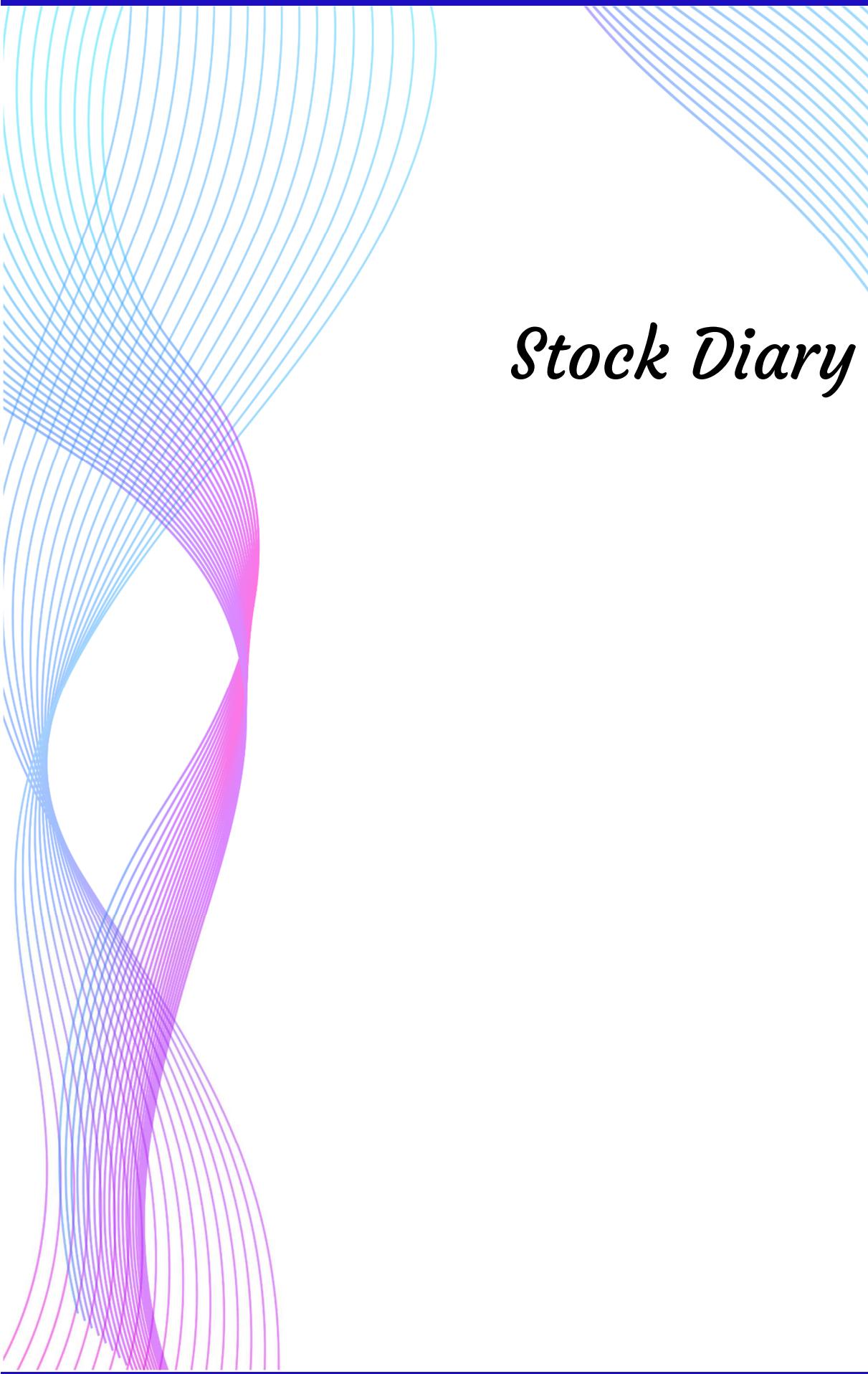
To :
Veg Warehouse

Deliver to :
Chromis Pos
The New Face of Open source POS
Copyright (c) 2015-2020 Chromis
Any Town
post Code

Qty	Stock Code	Unit Size	Description	Unit Cost	Tax Rate	Total	
100	Apples	Each	Apples	1.00	0.0%	100.00	
						Sub Total	100.00
						Tax	0.00
						Shipping	0.00
						Total	100.00

Page : 1 of 1

Examples of received and cancelled orders.



Stock Diary

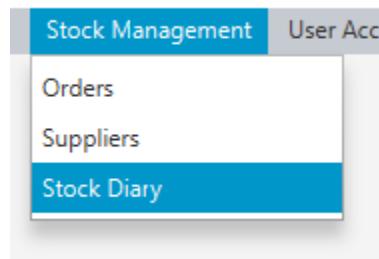
Chromis Administration

The 'Stock Diary' allows for the following types of stock movements

- Inclusion of stock purchased manually rather than via purchase orders
- Recording stock breakages
- Recording stock wastage
- Supplier returns
- Transferring between locations

Open the 'Stock Diary' panel 'Stock Management – Stock Diary'

Administration v1.00 Beta 2104-11

A screenshot of the 'Stock Diary Entries' screen in Chromis Administration. The title bar indicates the version is v1.2 beta 212901. The menu bar includes File, Inventory, Stock Management, Users, Customers, Maintenance, Reports, Utilities, Options, and Help. The toolbar contains icons for New, Open, Save, Print, and others. The main area has tabs for 'General Details' and 'Stock Diary Entries'. Under 'General Details', there are fields for 'Item Reference (SKU)', 'Date' (set to 11/07/2021), 'Movement Reason' (a dropdown menu), 'PLU (Default Barcode)', 'Ticket Description', 'Transfer To' (a dropdown menu), and 'Transfer From' (a dropdown menu). Below this is a table with columns: Reference, Barcode, Description, Category, Sell inc Tax, Sell Price, Buy Price, Select, Qty, and Cost. A message 'No content in table' is displayed at the bottom of the table area.

To transfer stock, select the reason for the movement

Chromis Administration

The screenshot shows a form with four input fields: Date (10/05/2021), Movement Reason ((Out) Breakages), Transfer To, and Transfer From. The Transfer To and Transfer From fields are currently disabled, indicated by a greyed-out appearance.

The Transfer To & Transfer From are enabled depending the Movement Reason select. Transfer between location is not available if there is only a single location in the system

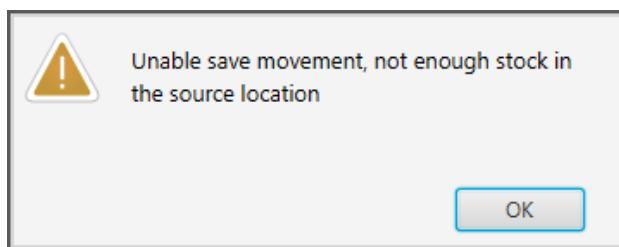
The screenshot shows the same form as above, but now the Transfer To and Transfer From fields are enabled and populated with "Main Store".

Once the 'Transfer From' is selected the products available will be displayed.

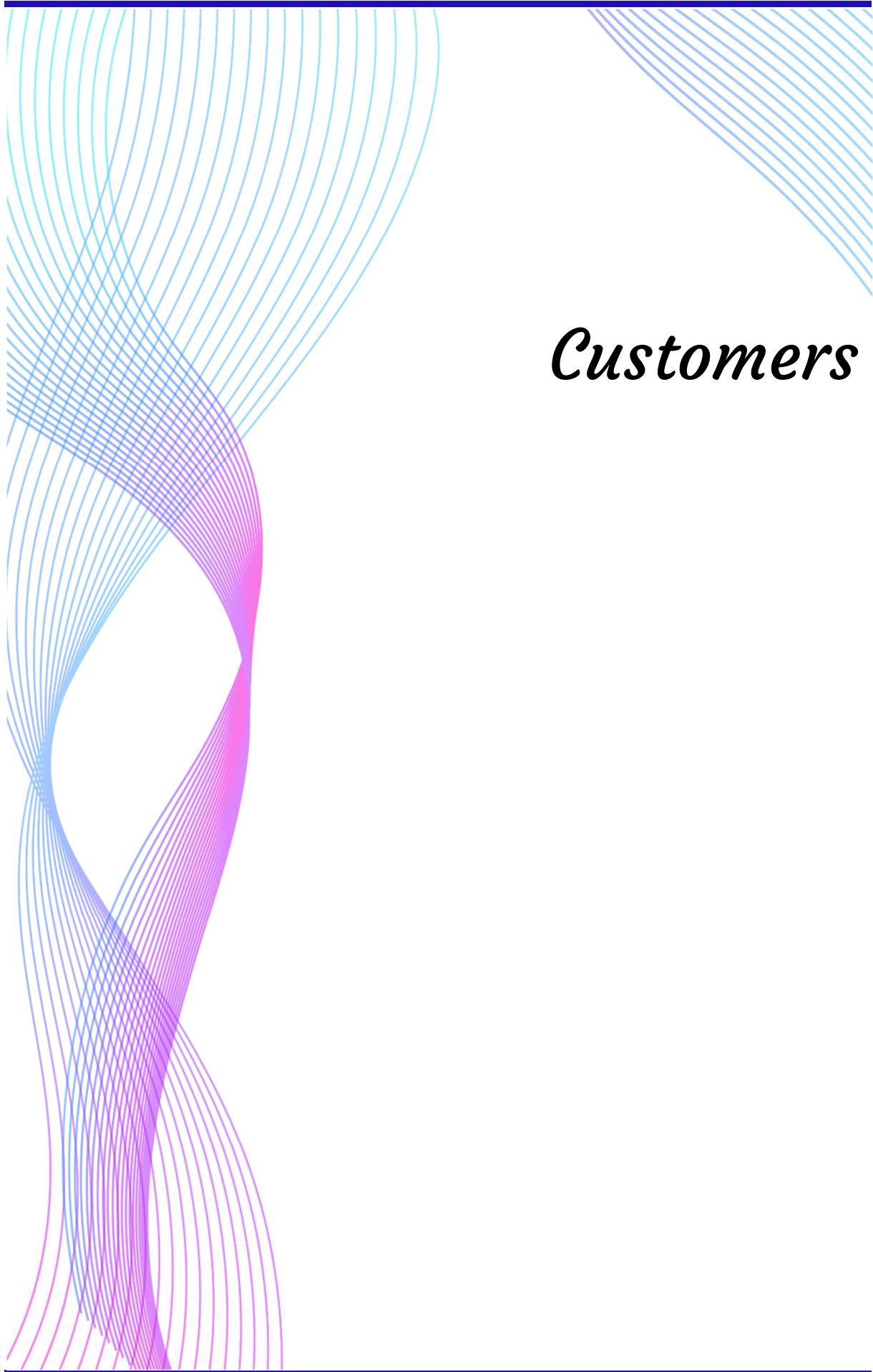
Select the product(s) that are to be transferred and the quantity, if the movement reason is outbound the stock holding for the current location is displayed.

Reference	Barcode	Description	Category	Sell inc Tax	Sell Price	Buy Price	Select	Qty	Cost	
CheeseBurger	CheeseBurger	CheeseBurger	Takeaway Food	5.95	5.51	1.030	<input type="checkbox"/>	240.00	0.00	
Steak	Steak	Steak	General Products	13.95	12.92	0.000	<input type="checkbox"/>	0.00	0.00	

If an attempt to transfer more stock than the locations hold the transfer will not be permitted when trying to save the movement



All stock transfers affect the stock holding, either increasing it for an inbound or decreasing it for an outbound transfer.



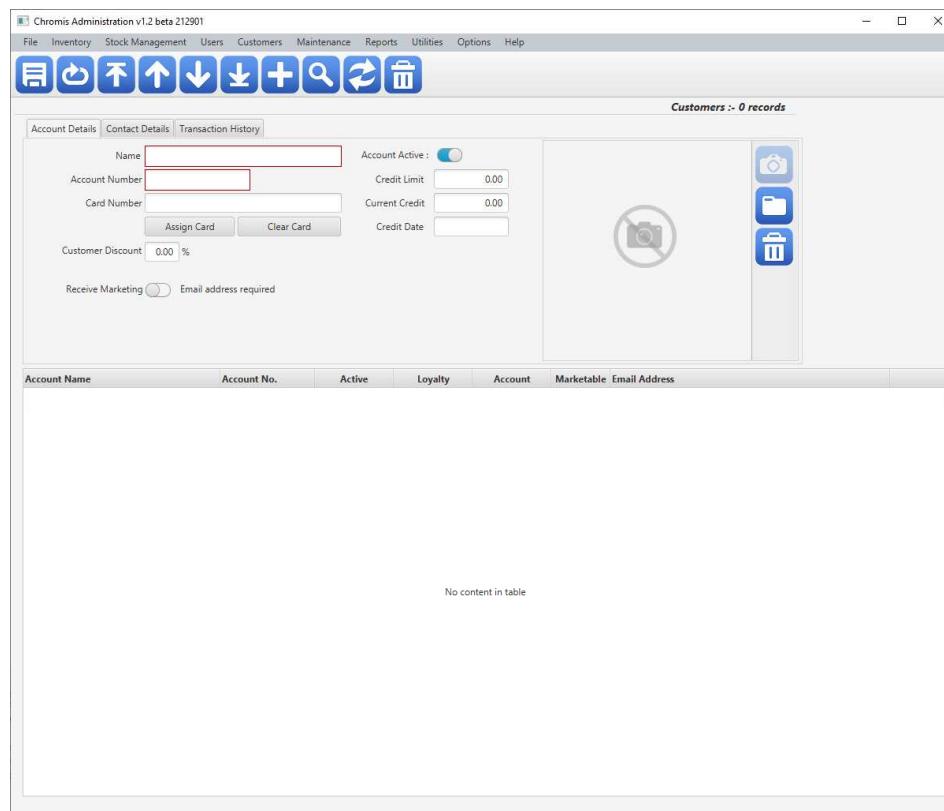
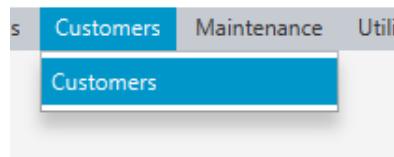
Chromis Administration

Chromis supports 2 types of customers

- Account Customers
- Loyalty Customers

Loyalty options will only be displayed if the Loyalty scheme has been activated. Loyalty will be covered in more detail in the next section.

Open the Customer panel ‘Customer – Customers’



The Customer panel consists of 4 tabs

- Account Details
- Contact Details
- Transaction History
- Loyalty History (This is only available if Loyalty is enabled)

Chromis Administration

The Account Details tab, holds the basic details for the customer, there are 2 compulsory fields were data must be supplied

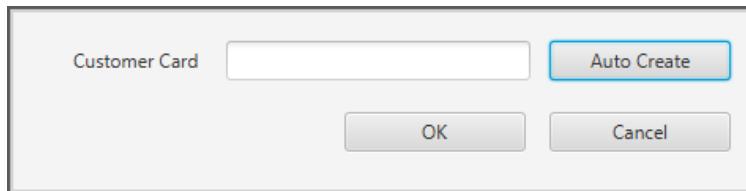
- Name
- Account Number (this is the number issued by the business)

When a new customer is created the account is active by default.

If a customer is allowed to operate with credit facilities, the amount of credit they are allowed must be supplied.

Current Credit and Credit data display the current credit the customer has spent and the date of the last transaction.

You may also have the need to issue customer cards, these can be assigned by the system or a custom number can be entered. To assign a card click 'Assign card'



'Auto Create' instructs the application to create the card number, or a custom number can be typed in the Customer card field.

A screenshot of the 'Account Details' tab in a software application. It shows fields for Name (John L), Account Number (Lew0840), Card Number (C530998589909), Customer Discount (0.00 %), and marketing preferences ('Receive Marketing' toggle and 'Email address required'). Other tabs like 'Contact Details' and 'Transaction History' are visible at the top.

If you operate a model where account customers are given a discount, the discount amount is entered.

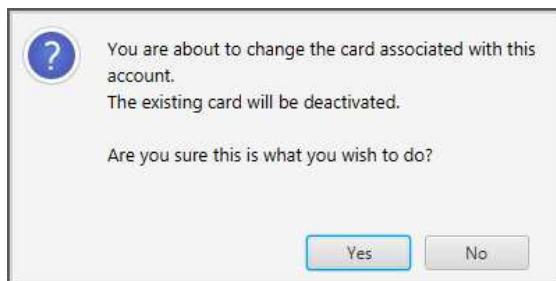
It may be that the operating model use email to inform customers of offers etc, 'Receive Marketing' must be enabled to enroll in this option. If this is activated an email address must be supplied on the next tab 'Contact Details'

There is the ability to add an image to the customer record, this could be a photo that is printed on their card.

When a card has been assigned to the customer the 'Assign Card' becomes 'Replace Card', if the customer loses their card a replace can be issued, the option is that a new card is issued with the same number in which case there are not actions required in the customer record.

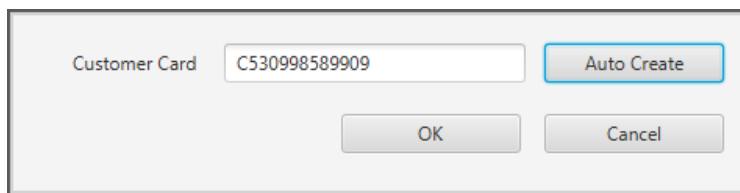
Chromis Administration

Alternatively, a replace card with a new number can be issued, click 'Replace Card'



A warning will be displayed indicating that the existing card will be deactivated in the system which prevents it being used if found.

The card number dialog will be displayed again.



Contact Details

A screenshot of a customer record interface showing the "Contact Details" tab selected. The form includes fields for First Name, Surname, Address, City, PostCode, Telephone, Mobile, Fax, Email, and Date of Birth. A large text area for Comments is also present. The top navigation bar shows tabs for "Account Details", "Contact Details" (which is active), and "Transaction History".

This tab allows more details to be recorded about the customer, it is important that you are fully aware of how GDPR affects your country of operation around collecting data.

The final tab (without Loyalty enabled), is the customer transaction history. Transactions will only show if the customer was selected as part of the sale process.

By default it selects the transaction from the last 30 days, the count is the total number of transaction held for the customer.

Chromis Administration

Account Details	Contact Details	Transaction History	Loyalty History	
Total Transaction found	Receipt No.	Receipt Type	Receipt Date	Receipt Amount
3	5	Sale	12-07-2021	75.00
	4	Sale	12-07-2021	68.00
	3	Sale	12-07-2021	282.00
Show Entries from				
12/06/2021				

Account Name	Account No.	Active	Loyalty	Account	Marketable	Email Address

Double clicking on the transaction will display its details.

```
Receipt:      0000002
Date:        11 May 2021, 00:17:45
Terminal:    DESKTOP-E541QL9
Served by:   Administrator

Customer:   John L
Discount:    0.1
Account:    Lew0840
Current Debt: £51.62

Item          Price     Qty     Value
-----
Steak         £13.95   x1     £13.95

-----
Items Count : 1

Nett of Tax :                  £12.92
Taxes :
  Tax 7%           £12.92   £0.90
  Tax 1%           £12.92   £0.13
Total :                      £13.95

On Account          £13.95
-----
Tendered:            £13.95
Change:              £0.00
```



Loyalty

Chromis Administration

This section takes an in depth look at the loyalty system within Chromis, due to the complexity of the module reference to the POS and how it interacts with Loyalty offering will be mentioned.

What is a Loyalty program?

In the retailer's marketing toolkit, loyalty programs have proven themselves as one of the most effective tactics for increasing revenue and inspiring customer loyalty.

We know that it costs a lot less to sell to existing customers than acquire new ones—that's why brands invest in loyalty and rewards programs.

Loyalty programs (or reward schemes) are usually designed to encourage the existing customers of the business to continue using the service of the business running the program. In return for the customers continued support they are offered a reward for doing so.

While they can be so effective, customer loyalty programs are nothing new. Most fall into one of four categories: points, tiers, social media, and paid programs. That's why some retailers are looking to shake things up and find innovative new ways to build rewards programs and inspire customer loyalty.

In all loyalty schemes there needs to be a means of identifying the customer, this identification can take many forms from an email address to a physical card issued to the customer. The customer would then present this card at every transaction to earn the rewards offered by the scheme.

Most schemes will also use the data captured from the members, for the purpose of direct marketing.

Simple Loyalty Scheme

The simplest form of a loyalty program is those, where a customer is issued with a paper card, similar to that shown below.



Each time the customer purchases a coffee the card is stamped. When the card is full it is exchanged for a free coffee. The advantages of this type of loyalty scheme, the cards are cheap to purchase and easy to operate, the disadvantage is that the interaction with the customer very impersonal.

What Loyalty program options are in Chromis?

Chromis Administration

The loyalty program in Chromis can operate in one of 2 models. Once you have decided which way you wish to operate, this is configured from within the Chromis System Config. Once selected and a transaction has been processed you cannot change to the other model.

The 2 models are:

- Earn x points for specified spend (ie GBP)
 - You issue a specific number of points for each full GBP spent
 - You set the number of points that are required for a money off voucher
 - You set the value of the voucher.
- Earn & Burn
 - You allocate the number of points an item will earn the card holder buy it. (Earn)
 - You allocate the number of points that are needed to get an item. (Burn)

Choosing a Chromis Loyalty Scheme

As stated earlier you need to decide which of the 2 models you are going to use, the easiest to configure is the 'Earn x' model.

To assist your decision, we will consider a couple of scenarios'.

Scenario 1

As part of your business model, you decide that you will give your customer 10 points for each GBP spent. When the customer has collected 5000 points, they will be granted a £5.00 voucher that can be redeemed in the store.

Scenario 2

This time you run a small coffee shop, and wish to allow the customer to collect points each time they purchase an item from a selection of products. Once they have collected a sufficient number of points, they can spend these on the products that you decide can be purchased using points. This type of scheme is similar those where you are issued with a paper card that is stamped each time you buy a coffee, buy 10 cups get 11th free.

From the above you can see that this scenario 1 fits the 'Earn x' model and scenario 2 can fit into 'Earn & Burn'

Identifying the Customer

The important part of any scheme is the ability to identify the customer, ensuring that any points earned are allocated to the correct customer.

Most schemes operate by issuing the customer with membership number, usually in the form of a physical card with the number on it.

These numbers tend to follow a fixed format, which enable loyalty systems to identify these cards for example

199500xxxxxxxx

Chromis Administration

Where 199500 (header) identifies the card type and xxxxxxx represents the main membership number

19950000001

19950000002

...

...

19959999999

It is also common practice to provide a means of reading this number into a POS system, this can be via the magnetic strip or a barcode.

It is important to try and ensure that the number cannot be mistaken for a standard GTIN (Global Trade Item Number) normally referred to as a EAN-13, EAN-8, UPC-A or UPC-E for example.

It is recommended that you select a barcode format such as code 128.

You can create or have cards made with this number encoded in to a magnetic stripe or a printed barcode. To use the magnetic stripe, you will need to have a magnetic stripe reader (MSR) connected to your system, it is highly recommended that you have both on the same card.

The use of these type of cards, allows you to operate an anonymous loyalty system should you wish, the customer is not required to register their details to use the scheme. This can assist with any GDPR requirements that you may have.

You can also use the same card numbering, to collect limited customer data should you wish to do so.

Both of these models store all of the loyalty data into the database, and you can operate both (anonymous or registered customer details) at the same time.

Enabling Loyalty Capability

Before you enable the loyalty scheme in Chromis, you must decide which of the two models is going to be used, 'Earn x' or 'Earn & Burn'.

Enabling the loyalty capability is done using the Chromis System Configuration application.

Chromis Administration

Connected to database : chromispro on localhost

General Locale Payment Method System Options Ticket Setup Restaurant & Orders Sales Panel Card Setup

Loyalty Enabled

Loyalty Model Earn x points for every £ spent Earn & Burn points on selected products

15 Points earned for each £ spent
5000 Points required to earn voucher
5.0 Voucher has a value of

M1995 Loyalty Card Number Prefix

Show all rewards

Enable for account customers

Gift Cards Enabled

M1998 Gift Card Number Prefix

MSR Settings Magnetic card reader leading sentinel Magnetic card reader trailing sentinel

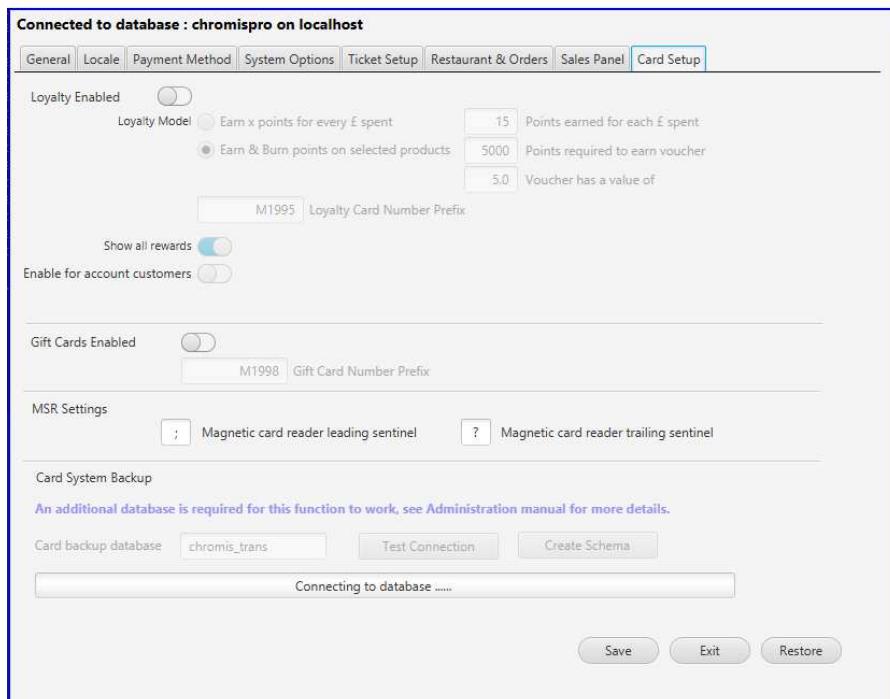
Card System Backup

An additional database is required for this function to work, see Administration manual for more details.

Card backup database chromis_trans Test Connection Create Schema

Connecting to database

Save Exit Restore



In the 'Card Setup' panel you can enable both the Loyalty scheme and Electronic Gift Cards (EGC), we will cover the gift cards in a later section.

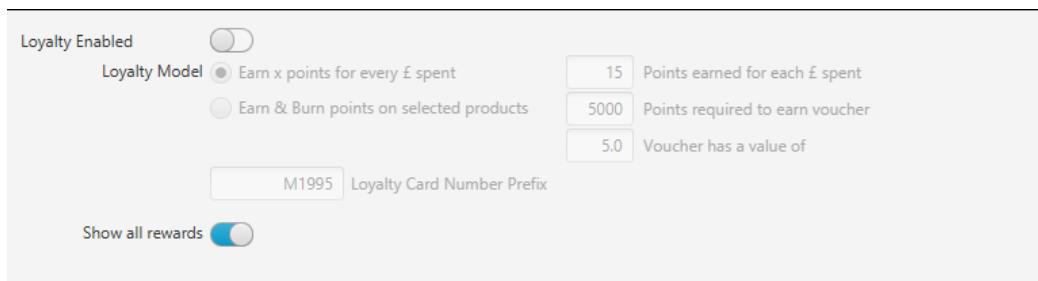
Loyalty Enabled

Loyalty Model Earn x points for every £ spent Earn & Burn points on selected products

15 Points earned for each £ spent
5000 Points required to earn voucher
5.0 Voucher has a value of

M1995 Loyalty Card Number Prefix

Show all rewards



Let's now assume that you are going to use the card block that was used as an example earlier.

Enable the scheme.

Loyalty Enabled

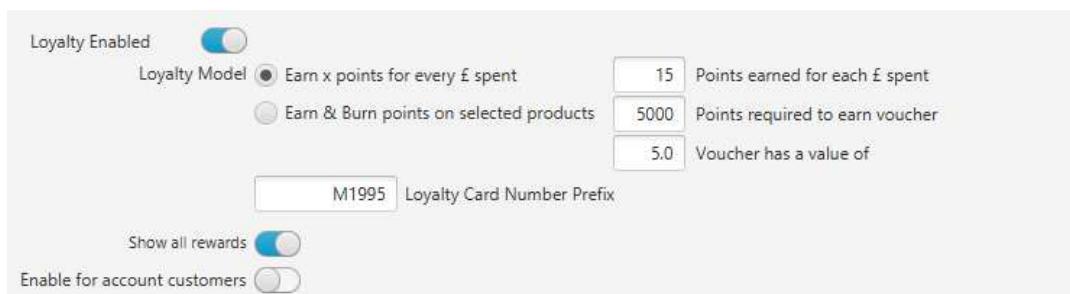
Loyalty Model Earn x points for every £ spent Earn & Burn points on selected products

15 Points earned for each £ spent
5000 Points required to earn voucher
5.0 Voucher has a value of

M1995 Loyalty Card Number Prefix

Show all rewards

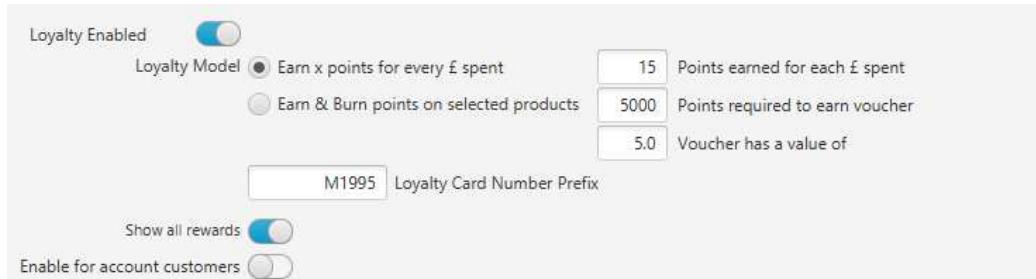
Enable for account customers



Now select the Loyalty Model you wish to use (default is Earn & Burn). In this model all points are controlled on the product setup panel.

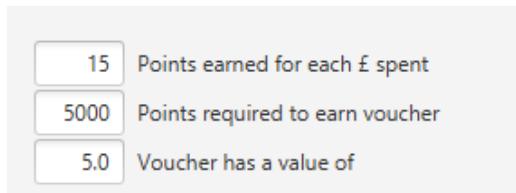
Chromis Administration

When 'Show all rewards' is enabled, this will display all the rewards available in the scheme irrespective if the customer has enough points, in the redemption panel. (We will see this panel later)



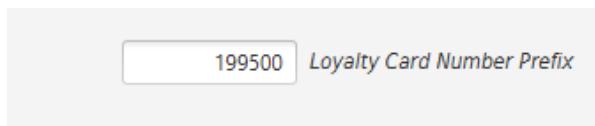
If you wish to allow account customers to benefit from the loyalty scheme, this can be enabled here, it means that their customer card also activates the loyalty process.

Selecting 'Earn x points' enables further fields which need to be completed.



In the above we issue 15 points for each 1 GBP spent. When then the customer has collected 5000 points, they will have a £5 voucher added to their account.

Now we need to set the card block prefix, this must be a numeric sequence and it is recommended to set it with a minimum of 4 characters. It is this card block that will allow the use of anonymous customers.



Next, we need to set up the magnetic stripe reader (MSR) and the Barcode prefix.

When a card is read by a MSR, the hardware will add a leading and trailing sentinel to the output, these are not part of the data, but used to indicate the data segment read from the track. The default sentinels are ';' and '?', there are some MSR which will allow you change these; if these are different you can configure Chromis to expect different sentinels.

To check what sentinels, your MSR sends, open a simple text editor and swipe the card.

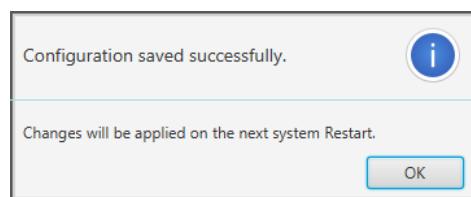


Chromis Administration

You should be able to see the sentinels used by the reader you will be using. If these are different from the configuration in Chromis, change these under 'MSR settings'. Chromis uses these sentinels as part of its operation to check the source of the input, it then does not try to read it as a normal product.

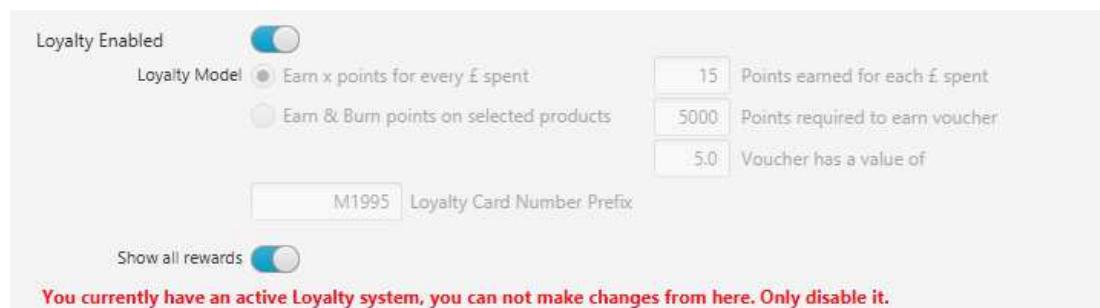


At this point you can save now save the configuration. Once you restart Chromis Loyalty will be active.



Once a scheme is enabled and a card has been activated, you cannot change the model of operation from within Chromis. Any changes to the alternative model will result in all cards being made inactive and any points lost.

You can however switch it off, which retains all points earned by the members.



Point types

We will now take a look at how the schemes operate in more depth and at some the capabilities of these schemes.

Earn x points

As explained earlier the 'Earn x' scheme provides a fixed number of points to the customer for each full currency unit they spend, example if the customer spends £15.67, they will get points based on £15.00. This is the simplest scheme to configure and operate.

It is up to the business how this allocation and redemption will work. Some schemes give 1 point per full currency unit, and require 500 points for a £5.00 voucher. This means that the customer needs to spend £500 to get a 1% return. Some issue more points and increase the required points, it can be done this way to give the impression that the returns are bigger.

However, there may be occasions where you wish to change the number of points issued:

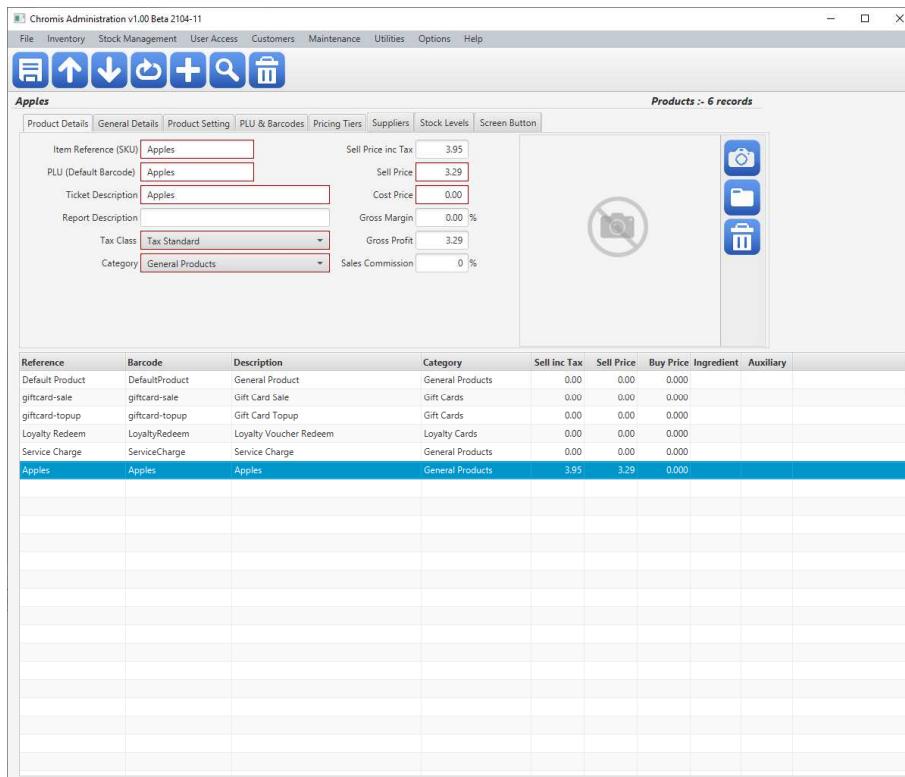
Chromis Administration

- Item is not eligible for points
- Items where the points should be less than normal
- Promotions where you wish to offer extra points

Chromis provides the ability to operate this kind of model, if the loyalty capabilities are enabled extra options are made available in the product editor.

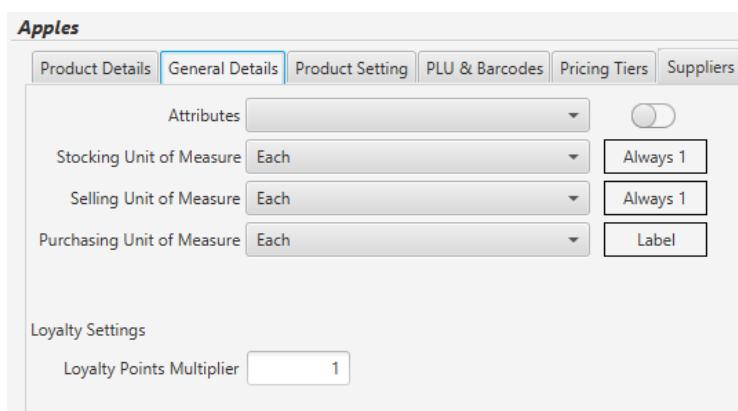
Open the ‘product’ editor.

Select the product you wish to change the scheme settings for.



Then select the ‘General Details’ tab

For Earn x' you will see an option for ‘Loyalty points multiplier’



Chromis Administration

The default value is 1.00, changing this will affect how many points are issued when the product is sold. If the main scheme awards 15 points this means it will be 15×1.00 .

Should you wish to exclude this product from the scheme set the value to 0.00, you may wish to do this with cigarettes for example. In the event you do not want the customer to get as many points you could set it to 0.50 to give the half the amount.

From time to time, you may wish to run a promotion where you tell the customer each time, they buy this product you will issue them with 3 times the points, in that case set the value to 3.00.

This scheme is the easiest to configure and once you have established the original setup, the scheme will operate without any further changes, once enabled.

Earn & Burn

If you have elected to use the 'Earn & Burn' scheme, you will have a more significant amount of work to do, than the 'Earn x points' scheme.

In this scheme you select the products which can earn points and the number of points issued for that products. You can also decide what products the customer can buy with the points (burn).

Example

If you have a coffee shop and decide that if customer buys 10 drinks, they get the 11th free, this is the scheme to use.

To set the products up for this
Open the Product editor

Select the product you wish to update

The screenshot shows the 'Product Details' tab selected in a product editor. Under the 'Loyalty Settings' section, there are two input fields: 'Points earned buying item' set to 0 and 'Points needed to buy item' set to 0.

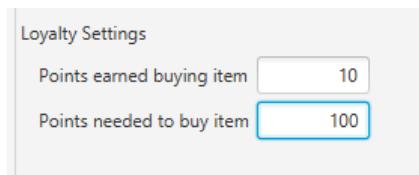
Located at the bottom of the panel is the Loyalty settings, you will notice that these settings are different from the previous scheme.

A zoomed-in view of the Loyalty Settings section, showing the same two input fields: 'Points earned buying item' set to 0 and 'Points needed to buy item' set to 0.

Chromis Administration

It is these fields that are used to set the points for the scheme.

So, using our example of the coffee, you would set these accordingly.



Loyalty Settings

Points earned buying item

Points needed to buy item

You could of course have set these values to 1 and 10 with the same effect.

If you have set up multiple products, let us say a 'Slice of cake' with a burn value of 200, you cannot limit the points to only purchase to cake with just those earned from buying the cake.

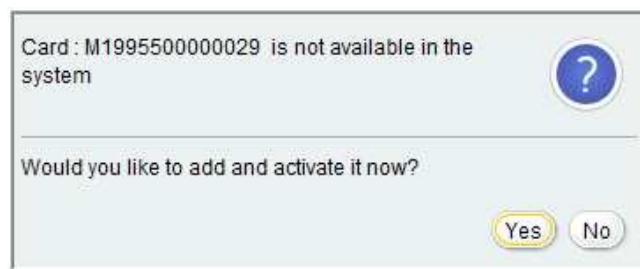
Activating the Loyalty cards

Before the customer starts to earn points their card needs to be activated, only once this is done can the points be earned. All loyalty accounts need to be activated regardless of how they are created.

We will look at the process of activating card from the card block we set up earlier; we will look at the anonymous operations first.

To activate the card for anonymous operation, you need to be in the sales screen.

Swipe the card or scan the barcode on the new card, as the card is not in the system an activation message is displayed



Select 'Yes' to activate the card. If you select 'No' the card is ignored and not recorded into the system.



Card Number	: M1995500000029
Current Points	: 0
Last Activity Date	: 11-05-2021 02:29:53
Last Activity	: New card added and activated from sales panel

OK

The loyalty dialog box will now be displayed; this is displayed each time the card is presented in a transaction.

Chromis Administration

It displays

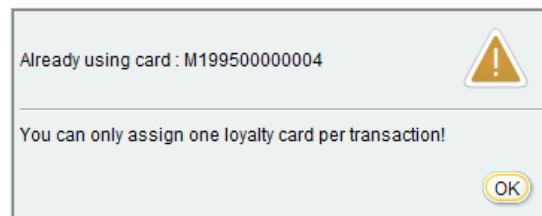
- The number of the card
- The current points on the card
- The last activity date recorded in the database for the card
- The last activity messages

You will see in this case the last activity was the activation of the card.

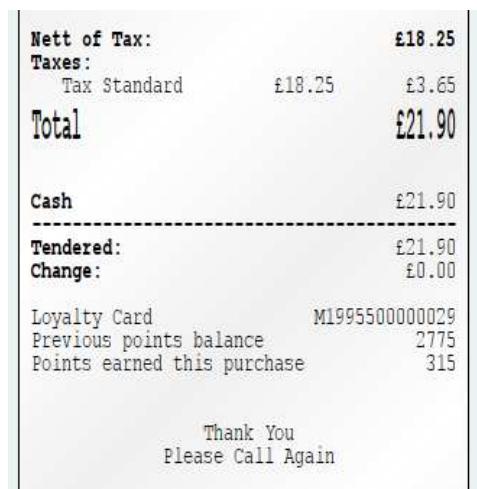
Clicking 'Ok' returns you back to the sales panel; which now shows the loyalty card is in use.



Chromis will not allow more than 1 card to be used in a single transaction, any attempt to activate or use another card displays a warning message.



Once the transaction is completed, Chromis processes the transaction against the scheme rules and the Loyalty details are shown on the bottom of the receipt.



In the above sale of £21.90, the amount is rounded down to 21 and then multiplied by the points setting in the main loyalty configuration panel, giving the card 315 points.

If we now present the card again in the sales panel, we can now see that the card has 3090 points stored, with the last transaction of 315 points. All of this data is held in the database not on the card.

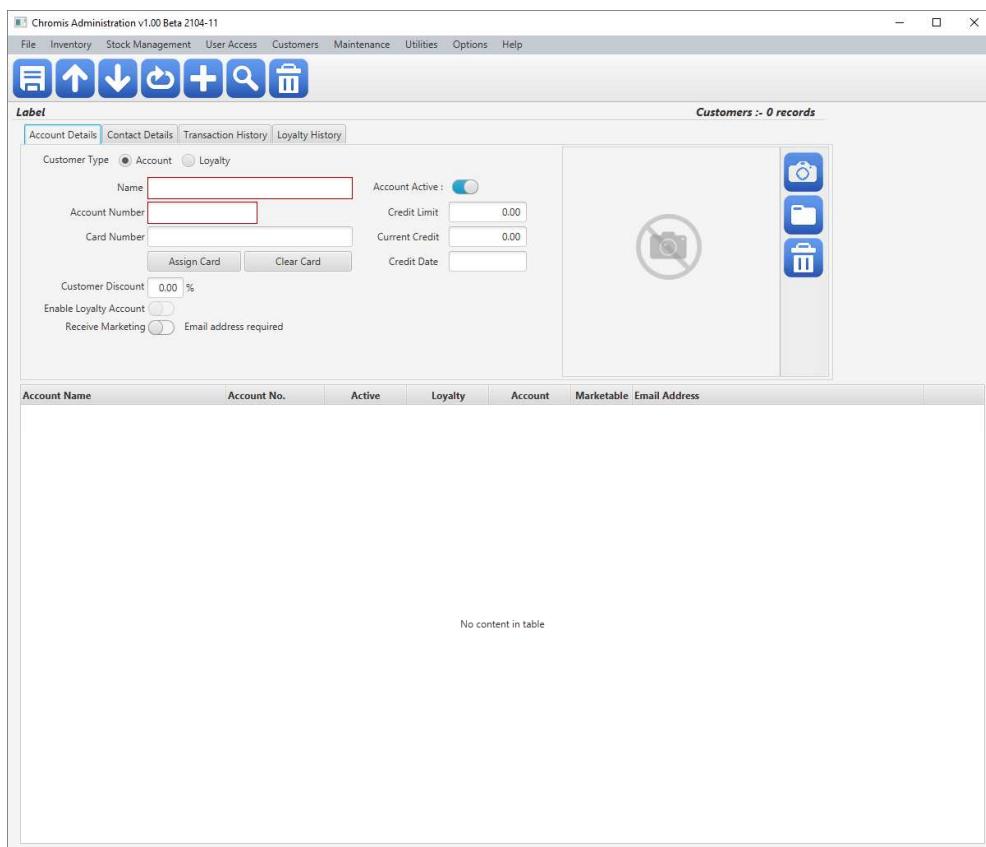
Chromis Administration



Activating the card via Chromis Administration - Customer Panel

The second method of activating a card is by using the customer panel.

Open the customer panel in administration



With the Loyalty system now enabled the Customer Types should include 'Loyalty'

To create a Loyalty only customer, select 'Add new record' icon

Customer Type Account Loyalty

Select Customer type as Loyalty.

Chromis Administration

Customer Type Account Loyalty

Name

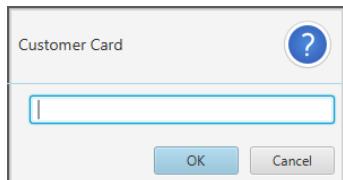
Card Number

Account Active :

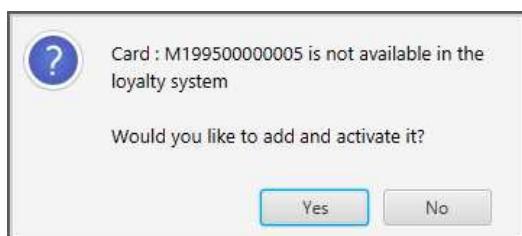
Assign Card

Receive Marketing Email address required

Enter the name of the customer, the click assign card.



Enter the card number to be assigned



If the option to allow account customers to participate is enabled, then the loyalty membership can be enabled.

A normal customer card can also be used for loyalty membership, this reduces the need to issue separate cards to customers for loyalty, if you wish to allow them to participate in the loyalty scheme.

John L (Account)

Account Details Contact Details Transaction History Loyalty History

Name

Account Number

Card Number

Assign Card Clear Card

Customer Discount %

Enable Loyalty Account

Receive Marketing Email address required

Credit Limit

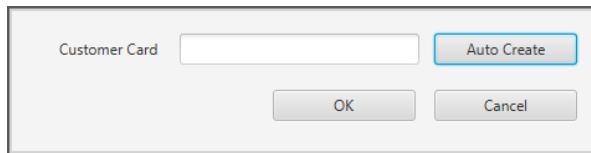
Current Credit

Credit Date

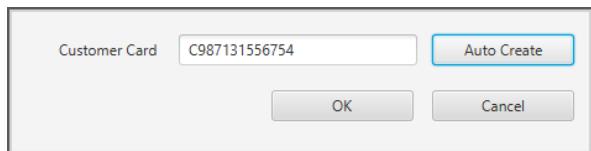
If the customer does not have a card allocated, it cannot have loyalty. In the above screen you can see that there is no card number assigned.

Selecting 'Assign card' to add a new card, brings up the 'Customer Card Number' dialog.

Chromis Administration

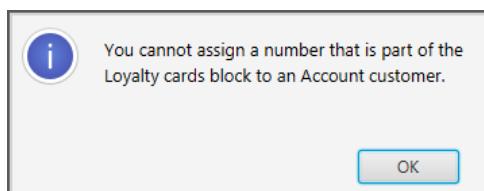


At this point clicking 'Auto Create' will auto populate the card number, using Chromis' auto populate customer number process.



Using this screen, you can also allocate your own number, for example a RFID card if you have the appropriate hardware. It is important should you decide to use your own numbers that you do not use a barcode from a known product.

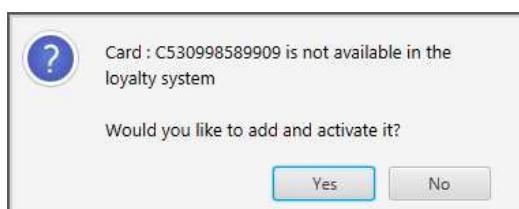
It is important that you do not try to assign a card from any card blocks you have configured in the Loyalty panel, if Chromis detects one, it will display a warning dialog and clear the entry.



Once you have a card number, the ability to assign this card to the loyalty scheme becomes available.

Name	John L	Account Active :	<input checked="" type="checkbox"/>
Account Number	Lew0840	Credit Limit	250.00
Card Number	C530998589909	Current Credit	51.62
Replace Card		Clear Card	
Customer Discount	10.00 %	Credit Date 11 May 2021	
Enable Loyalty Account	<input type="checkbox"/>	Receive Marketing	<input type="checkbox"/> Email address required

If you now enable the Loyalty Account, then save the record, you will get the card activation screen. You can enable this at a later stage if required.

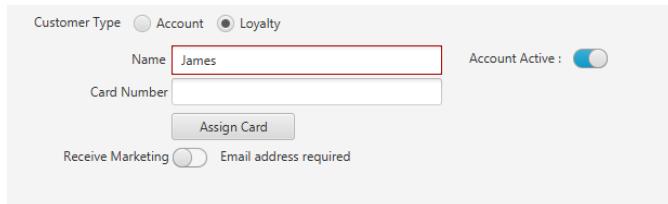


Chromis Administration

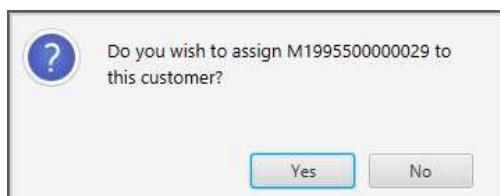
The card will be activated as part of saving the record.

If you have a card that was activated in the sales screen, and wish at later stage for this to be registered against a customer record.

Create a new Loyalty record, using ‘Add record’ icon and select customer type as loyalty.

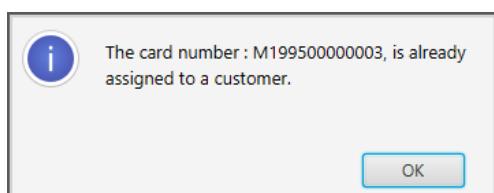


Assign a card and enter the card number of the customer’s card.



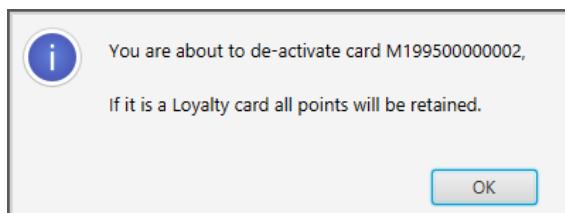
The prompt this time is to assign the card to the customer, there is no need to activate the card has this has already been done, the Point-of-Sale.

If the card assigned is already allocated to a customer the card details will not be recorded

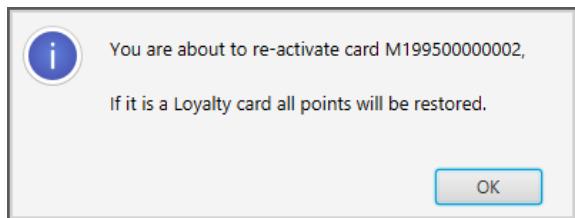


If at a later date you disable the loyalty setting or change the customer to inactive, the card will be disabled in the system; this does not remove the card, allowing it to be reactivated later if required.

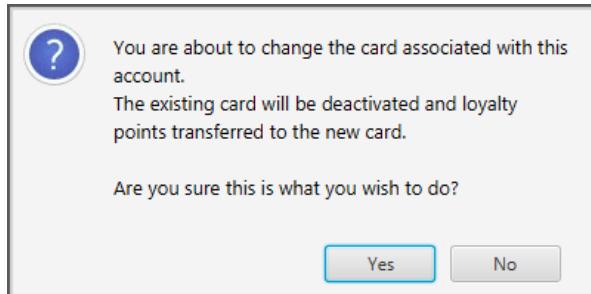
If the ‘Account Active’ status is changed, and it holds loyalty points these will be retained or restored depending upon the change direction



Chromis Administration



If it necessary to replace the are card at any stage, click 'Replace Card'



The dialog informs that the existing card will be deactivated and retired in the system with any points on it transferred to the new card.

Loyalty Transaction History Tab

When a customer is selected and the Transaction History tab is selected, all transactions assigned to the customer are shown, by default only the last 30 days are shown, but the total count is of all records found are found

Account Details	Contact Details	Transaction History		Loyalty History	
Total Transaction found	Activity Date	Card Activity	Activity Points	Card Balance	Receipt No.
4	12-07-2021	0175123290 : 1170 Points added to the loyalty card. Receipt - 0000008	1170	7095	8
	12-07-2021	0175123290 : 4080 Points added to the loyalty card. Receipt - 0000007	4080	5925	7
Show Entries from	12-07-2021	0175123290 : 1845 Points added to the loyalty card. Receipt - 0000006	1845	1845	6
12/06/2021	12-07-2021	0175123290 : New card created, activated and assigned to customer : Harry.	0	0	

Double click any line with a Receipt No. and the ticket that it references will be displayed.

Chromis Administration

```
Receipt: 0000006
Date: 17 May 2021, 22:39:18
Terminal: DESKTOP-E541QL9
Served by: Administrator

Customer: Lizzie
Account: liz121313
Current Debt: £0.00

Item          Price    Qty    Value
-----
General Product  £36.00   x1  £36.00
-----
Items Count : 1

Nett of Tax : £30.00
Taxes :
  Tax Standard      £30.00      £6.00
Total : £36.00

Cash £36.00
-----
Tendered: £36.00
Change: £0.00

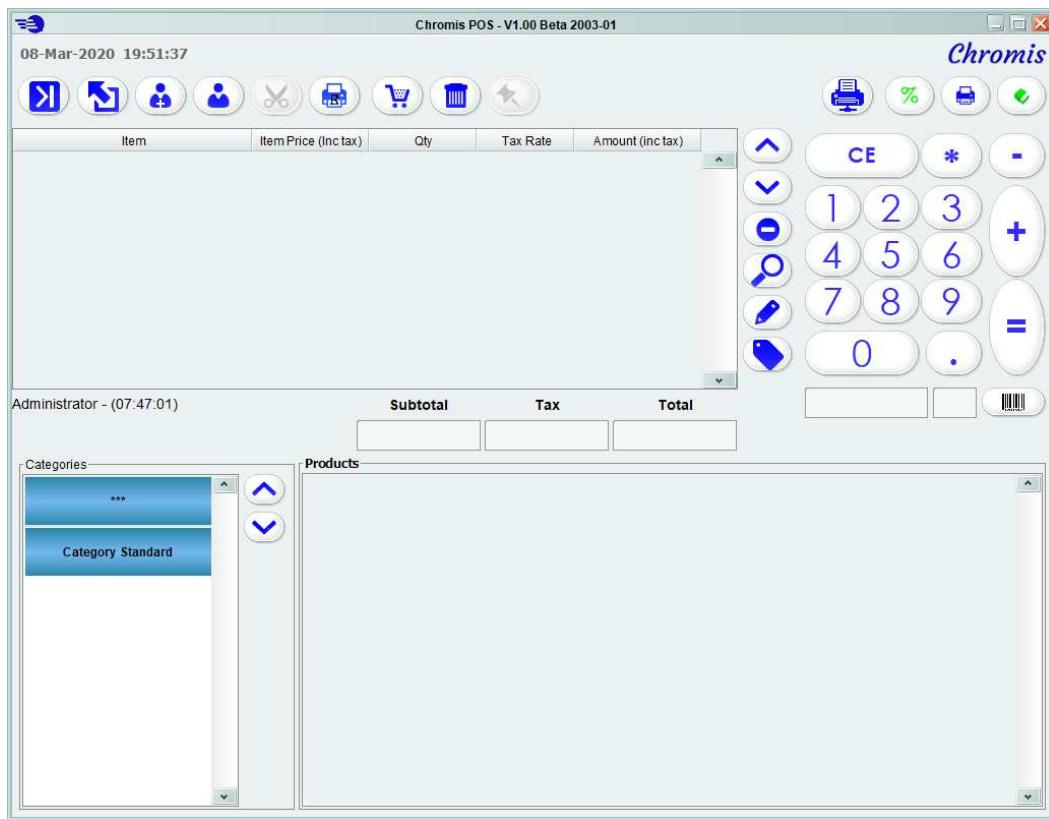
Loyalty Card: C182024204708
Previous points balance 210
Points earned this purchase 540
```

All transactions including card replacements are available.

Chromis Administration

Loyalty Card in use

We will now take a brief tour into the use of the loyalty system.



To collect any loyalty points, the loyalty card needs to be entered as part of any sales process before payment is accepted.

If the loyalty card is associated to a customer record, you can click the select customer button



Upon selecting a customer, the loyalty panel is displayed

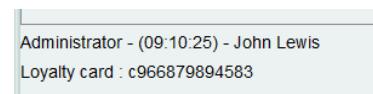
Chromis Administration



And the details are populated into the panel.

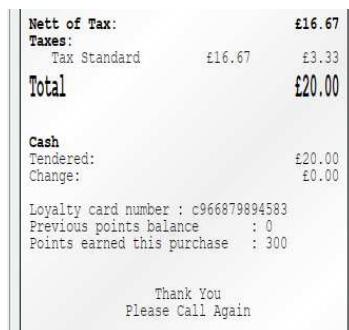


If the selected customer is an account record, the customer details are also populated into the panel



Once the sale is completed the points due are calculated and added to the loyalty account. The points awarded are based upon the loyalty model selected.

These details are printed on the customer's receipt.



If a card is entered, and it has been disabled in the system the card cannot be used without being made active again, this can only be done in the customer panel.



If the card has been replaced or removed the following dialog is displayed.

Chromis Administration

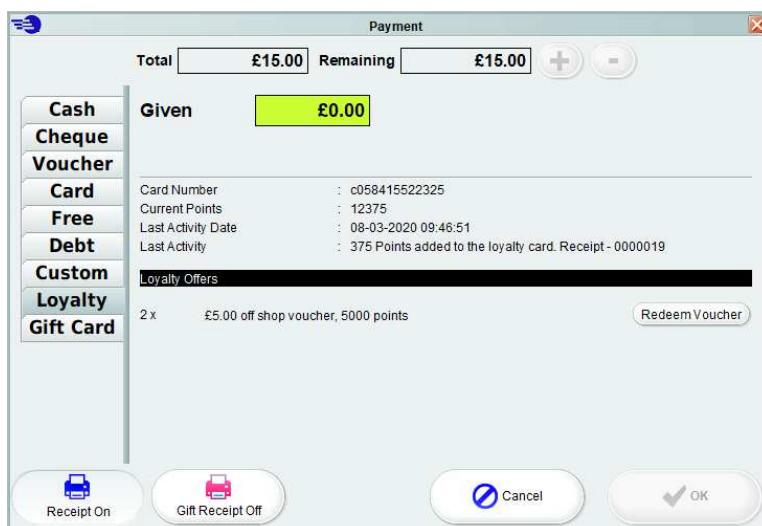


Redeeming Points

Earn x scheme

The loyalty card must also be entered in the sales panel if the customer wishes to redeem their points.

Once the sale has been completed and you are in the payment panel, you will have the ability to select Loyalty as a payment method.



This above panel is the 'Earn x' version of the panel. You will notice that this card has currently 2 vouchers of £5.00 that can be redeemed.

To redeem a voucher, click 'Redeem Voucher' this will increase the Given amount by the voucher value and decrease the available vouchers.

It is important to note that loyalty points are not issued against the value of the vouchers being redeemed.

Example

If the receipt value is £15.00 and you use a £5.00 voucher you will only receive points against the remaining £10.00.

Chromis Administration

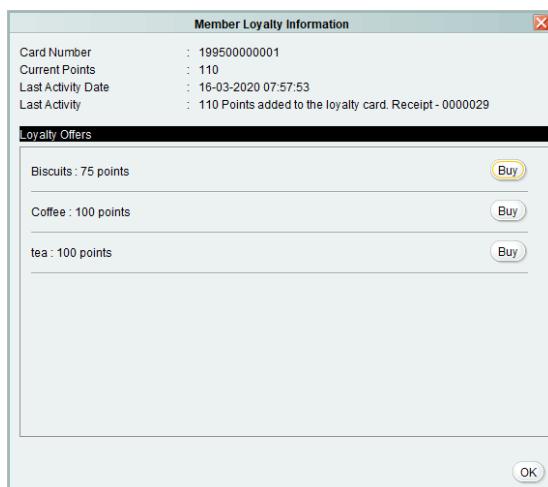
Nett of Tax:	£12.50
Taxes:	
Tax Standard	£12.50
Total	
	£15.00
 Loyalty Vouchers	
Redeemed :	£5.00
Cash	
Tendered:	£10.00
Change:	£0.00
Loyalty card number : 199500000001	
Previous points balance : 26250	
Points earned this purchase : 150	
Points redeemed this purchase : -5000	

On the receipt we can see that the loyalty vouchers is shown as a separate payment entry, also there are 5000 which have been redeemed and another 150 points earned.

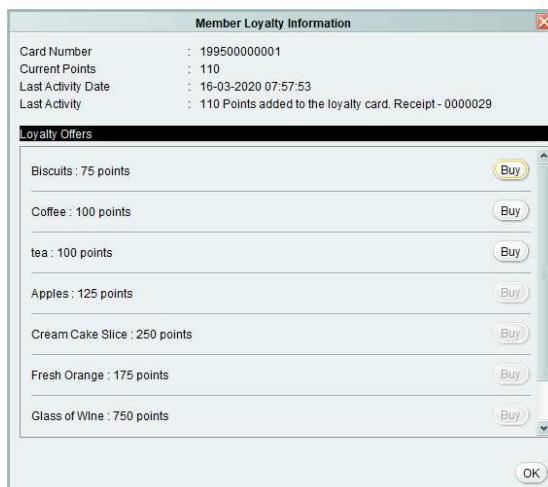
Earn 'n' Burn

The loyalty card must also be entered in the sales panel if the customer wishes to redeem their points.

This time the option to burn the points is displayed in the main sales panel.



Above shows 'Show all rewards' disabled



Above shows 'Show all rewards' enabled

Chromis Administration

You will get the loyalty card information for the customer and any offers that are available by burning points. The above we see that the customer has 710 points. They have enough points for the coffee and cake but they are still short on the 'Glass of Wine'.

The customer decides that they wish to use points for a coffee and slice of cake, click on the buy button, you will see that these items have been added to the sales ticket. Click 'OK' to leave the panel, if you need to burn more points in the same transaction swipe the card again will display the screen again.

Item	Item Price (Inc tax)	Qty	Tax Rate	Amount (inc tax)
Cream Cake Slice	£0.00	x1	20%	£0.00
Loyalty purchase - 250 points.				
Coffee	£0.00	x1	20%	£0.00
Loyalty purchase - 100 points.				
Coffee	£3.95	x1	20%	£3.95

You cannot increase the qty of a loyalty purchase using the '+' button, you can however remove the item using the normal buttons.

As part of the sale the customer decides to also pay for a single coffee.



You will notice that there is no 'Loyalty' payment tab in the 'Earn 'n' Burn' scheme.

Chromis Administration

Item	Price	Qty	Value
Cream Cake Slice	£0.00	x1	£0.00
-> Loyalty purchase - 250 points.			
Coffee	£0.00	x1	£0.00
-> Loyalty purchase - 100 points.			
Coffee	£3.95	x1	£3.95

Items count: 3			
Nett of Tax: £3.29			
Taxes:			
Tax Standard	£3.29		£0.66
Total £3.95			
Cash			
Tendered:			£3.95
Change:			£0.00
Loyalty card number : 199500000001			
Previous points balance : 740			
Points earned this purchase : 10			
Points redeemed this purchase : -350			

The receipt now shows the number of points that have been burned in the transaction along with any earned. You will notice that you do not earn points on the items that you used points to buy.



Electronic Gift Cards

Chromis Administration

We will now look at the Electronic Gift Cards option offered by Chromis. This is enabled using the same configuration panel as the Loyalty scheme.

Electronic Gift Card are a card that the customer can purchase and top up with funds to be spent in the store. Unlike gift vouchers the full amount on the card does not have to be used in a single transaction and can be popped up with additional funds, in effect they are cash. As with the Loyalty cards all data is held in the main database.

Open the card configuration panel.

Connected to database : chromispro on localhost

General Locale Payment Method System Options Ticket Setup Restaurant & Orders Sales Panel **Card Setup**

Loyalty Enabled

Loyalty Model Earn x points for every £ spent Points earned for each £ spent
 Earn & Burn points on selected products Points required to earn voucher
 Voucher has a value of

M1995 Loyalty Card Number Prefix

Show all rewards

Enable for account customers

You currently have an active Loyalty system, you can not make changes from here. Only disable it.

Gift Cards Enabled

M1998 Gift Card Number Prefix

MSR Settings Magnetic card reader leading sentinel Magnetic card reader trailing sentinel

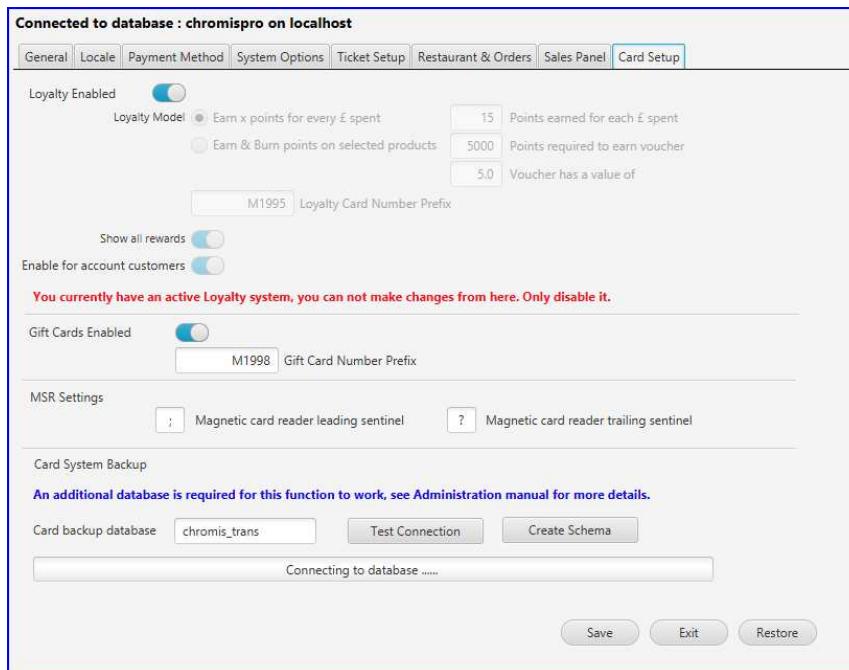
Card System Backup

An additional database is required for this function to work, see Administration manual for more details.

Card backup database Test Connection Create Schema

Connecting to database

Save Exit Restore



Enable the 'Gift Cards'

Gift Cards Enabled

1998 Gift Card Number Prefix

LAST CHANGES



As with the Loyalty card you need to assign the card block prefix to be used, once assigned and save the Gift Card option is ready to use.

Selling Gift Cards

When a gift card is sold, it is required that the card is activated in Chromis. Upon the entry of the card number the 'New Gift Card' panel is displayed.

Chromis Administration



Enter the amount to store on to the card



When you select 'OK' to complete the gift card details.

Item	Item Price (Incl tax)	Qty	Tax Rate	Amount (inc tax)
Gift Card Sale	£10.00	x1	0%	£10.00
Gifcard Number - 199800000001				

The card details are entered into the ticket, the tax rate for gift cards is set to 0%, this ensures that any sales tax is calculated on the final sale and not the gift, this prevents having to pay tax twice.

The details of the gift card are recorded upon the receipt

Item	Price	Qty	Value
Gift Card Sale	£10.00	x1	£10.00
-> Gifcard Number :	199800000001		
-> New Card Balance :	£10.00		
Items count:	1		
Nett of Tax:			£10.00
Taxes:			
Tax Exempt	£10.00		£0.00
Total			£10.00

If you need to top up the card simply enter the cards details in to the sales panel

Chromis Administration



Enter the amount you wish to add to the card, the ticket line will reflect this as a top up entry.

Item	Item Price (Incl tax)	Qty	Tax Rate	Amount (inc tax)
Gift Card Topup	£50.00	x1	0%	£50.00
Giftcard Number - 199800000001				

The details of the gift card top up are recorded upon the receipt

```

Date: 16-Mar-2020 23:28:11
Terminal: Master-PC
Served by: Administrator

Item      Price   Qty   Value
-----
Gift Card Topup £50.00   x1   £50.00
-> Giftcard Number : 199800000001
-> New Card Balance : £60.00

Items count: 1

Nett of Tax: £50.00
Taxes:
  Tax Exempt £50.00   £0.00
Total £50.00

```

If the customer presents their loyalty card whilst purchasing a gift card, there are no points earned against the gift card sale. (As can be seen on the receipt below)

```

Served by: ADMINISTRATOR

Item      Price   Qty   Value
-----
Gift Card Sale £50.00   x1   £50.00
-> Giftcard Number : 199800000002
-> New Card Balance : £50.00

Items count: 1

Nett of Tax: £50.00
Taxes:
  Tax Exempt £50.00   £0.00
Total £50.00

Cash
Tendered: £50.00
Change: £0.00

Loyalty card number : 199500000001
Previous points balance : 285
Points earned this purchase : 0

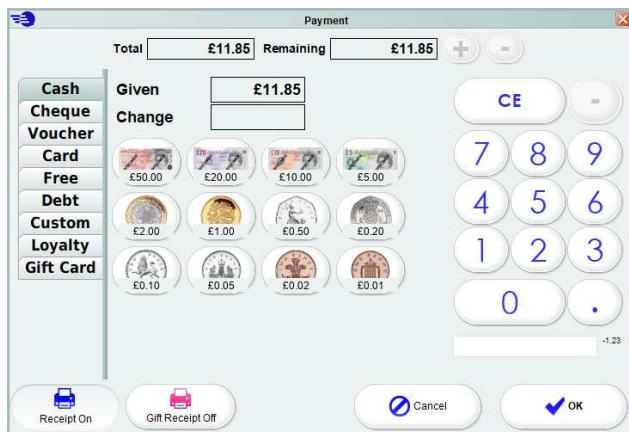
```

Chromis Administration

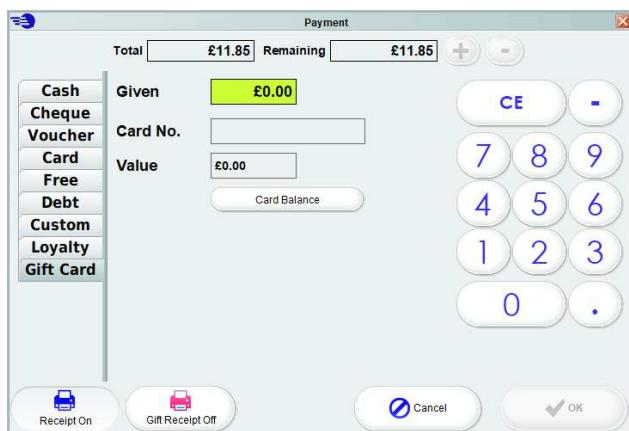
Paying with a gift card

The process of paying with a gift card is similar to any other form of payment.

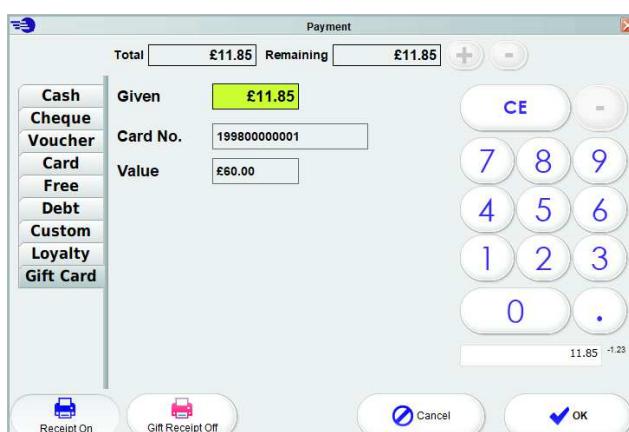
The sales are processed as normal, when the payment panel is presented, there is now an option to use a gift card.



Select the gift card tab



Enter the card number

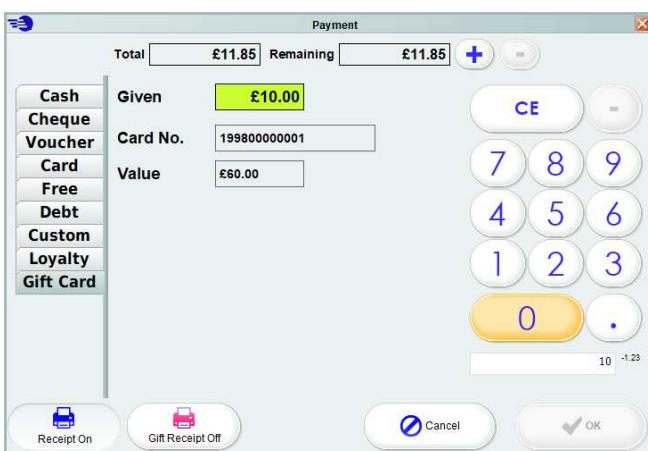


Chromis Administration

If you wish to pay the full amount using the card subject to there being sufficient funds on the card, just select 'OK' and the entire amount will be redeemed from the card.



Otherwise use the number pad to enter the amount you wish to redeem from the card, then press the add the amount to the payments.



The receipt will show the amount paid from the card and the remaining balance.

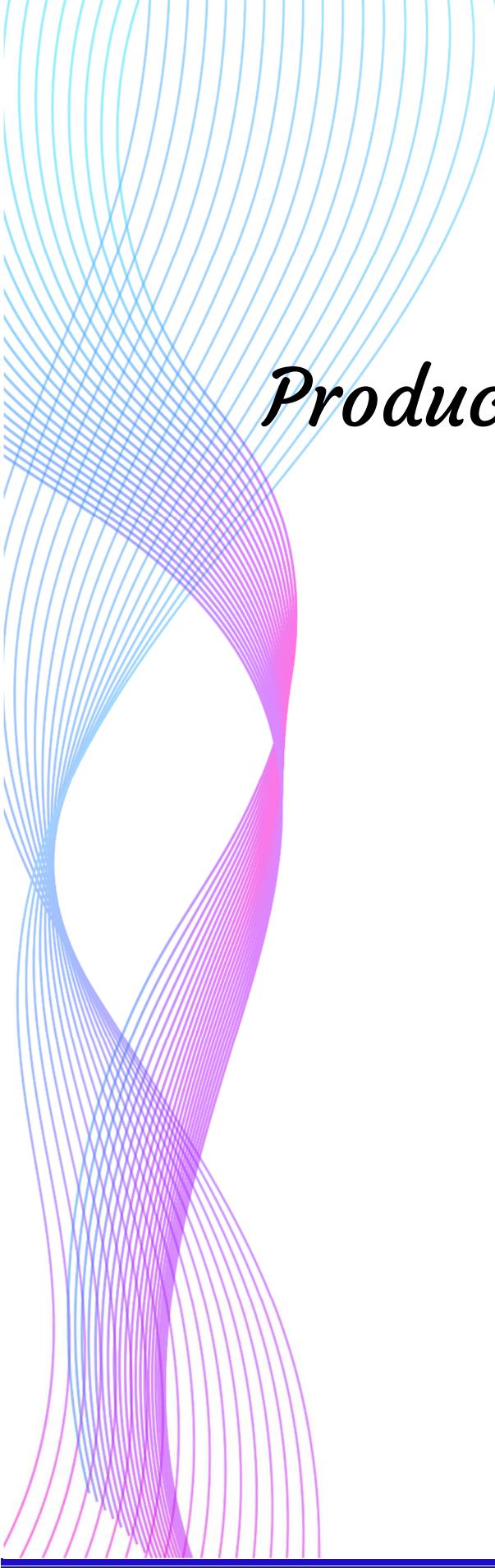
Item	Price	Qty	Value
Coffee	£3.95	x1	£3.95
Coffee	£3.95	x1	£3.95
Coffee	£3.95	x1	£3.95
Items count: 3			
Nett of Tax:		£9.87	
Taxes:			
Tax Standard	£9.88		£1.98
Total		£11.85	
Giftcard Payment			
Card Number	199800000001 :		£10.00
New Card Balance :			£50.00
Cash			
Tendered:			£1.85
Change:			£0.00

You can use multiple gift cards as part of the payment, simply select 'Gift Card' to enter the new card details. The receipt below shows 2 gift cards being used in single payment process.

Chromis Administration

Item	Price	Qty	Value
General Product	1,000.00	x1	£1,000.00
Items count:	1		
Nett of Tax:			£833.33
Taxes:			
Tax Standard	£833.33		£166.67
Total			£1,000.00
 Giftcard Payment			
Card Number 199800000001 :	£50.00		
New Card Balance :	£0.00		
Giftcard Payment			
Card Number 199800000002 :	£50.00		
New Card Balance :	£0.00		
Cash			
Tendered:	£900.00		
Change:	£0.00		

It is important that you have a backup process for the Chromis database, as gift cards are in effect electronic money. An alternative option is discussed earlier in this manual.



Products (Revisited)

Chromis Administration

As mentioned earlier, the Product section would be revisited at a later stage in the documentation. At this point further capabilities of Chromis have been reviewed which allows for more detailed overview of the products screen.

Some of the features in the products, are not yet fully implemented, but are in place ready for them to be made active at a later date.

The screenshot shows the Chromis Administration interface for managing products. The top navigation bar includes File, Inventory, Stock Management, Users, Customers, Maintenance, Reports, Utilities, Options, and Help. Below the navigation is a toolbar with various icons for file operations like Open, Save, Print, and Delete. The main title is "Products :- 9 records". A sub-header "Apples" indicates the current product category. The "General Details" tab is selected, showing fields for Item Reference (SKU), PLU (Default Barcode), Ticket Description, Report Description, Tax Class, Category, and several price-related fields (Sell Price inc Tax, Sell Price, Cost Price, Gross Margin, Gross Profit, Sales Commission). To the right of these fields is a placeholder area for images with a camera icon and a trash bin icon. Below the form is a table listing products with columns for Reference, Barcode, Description, Category, and financial details (Sell inc Tax, Sell Price, Buy Price, Ingredient, Auxiliary). Two entries are visible: "Apples" and "beans".

General Details

This screenshot shows the "General Details" tab for the "Apples" product. It includes fields for Attributes, Stocking Unit of Measure (set to "Each"), Selling Unit of Measure (set to "Each"), and Purchasing Unit of Measure (set to "Each"). There is also a "Mandatory" checkbox and a "Always 1" button. The rest of the screen is mostly blank, showing the standard product management interface.

On this tab an Attribute set can be assigned to the product, when an attribute is assigned, it can be made mandatory so that when the product is selected in the Point-of-Sale the attributes is always shown.

Next are the units of measure (UOM)

Stocking Unit of Measure and Selling Unit of Measure always equate the value of 1 unit. The description is what will be used in reports in other panels.

Purchasing Unit of Measure is the default quantity how the product is purchased, when adding supplier records further purchasing quantities can be created.

Product Settings

A product has a large number of parameters\settings that can be applied to it, these can be applied on this panel.

Chromis Administration

The screenshot shows the 'Product Setting' tab of the Chromis Administration interface. The tab is highlighted in blue. Below the tabs, there are several configuration options:

- Enable kitchen printer and order screen options:**
 - Enable Order Printer
 - Enable Order Screen
 - Show an age warning when this product is selected
 - Required Age:
 - Can Be Discounted
 - Maximum discount: %
 - Is an Ingredient
 - In Catalog
 - Order in Catalogue:
- Product Options:**
 - Variable Price Product
 - Auxiliary (Modifier)
 - Is Service Item
 - Scale
 - Always Available
 - Manage Stock Level
 - Receipt required for warranty
 - Retire Product

Remote Orders

Chromis supports the ability to send orders to remote printers, for example there may be a mains preparation area and a sweet are or drinks order can be sent over to the bar.

Chromis is configured with 3 printers

- Kitchen Printer
- Kitchen Printer 2
- Bar Printer

These need to be created using the terminal configuration application.

If the Chromis Kitchen screen is used, then the product can be sent to a screen rather than a printer, each screen will have a number allocated when they are setup.

Age Restriction

There is a requirement in some countries where a product is age restricted.

There are 2 ways age restrictions can be applied, directly to the product or via the product category. If an age restriction is found in both the product and category the highest age is used, this cannot be used to reduce the age over that in the parent category but it can be used to increase it.

Discounts

Chromis allows for products to be discounted, if this is enabled, the maximum discount that can be applied must be specified here.

Ingredient

A product can be designated to also act as an ingredient. When a product is allowed to be an ingredient, it is made available in the recipes panel but can still be sold as an individual item.

In Catalog

Chromis Administration

If the product is designated as being in the catalog, it allows the product to shown on the sales panel as a product button. The 'Order in catalog' assigns the order they will appear if the options to show in number order has be enabled, otherwise they will appear alphabetically.

Ideally it is recommended that barcode scanners are used, but the Point-of-Sale can work with both. Example variable price products would be configured to appear as a button in the Point-of-Sale while the of products would use barcodes.

Variable Price

A product can be configured to be a variable price, this means that the product is created to be in the catalog, so that it appears in the Point-of-Sale panel. A price must be entered on the number pad and then the product button selected.

For an example of its use:

You have an item for sale eg 'Tropical Fish' due to the number of different varieties, each with a different price, it would not be practical to create a product for every variety. A product is created called 'Tropical Fish' and set up as a variable price product. This allows for the sale of all the different varieties and they are all recorded as Tropical fish.

Auxiliary

When a product is flagged as an auxiliary item, the product can then only be sold as an add on to a product. These addons are added to a product in the Auxiliary panel and will be covered later.

An example of this could create your own pizzas. You have a product that is the base (this would be the basic cheese pizza), when the customer orders a create own pizza, they would then select the toppings they require, each topping could have a different selling price allocated to it.

Service Item

This set to product as a service item an example is a service charge applied to each sale.

Scale

The scale option links the product with scales for products that are sold by weight. Chromis supports the connection of electronic scales for this function, or the ability to enter the weight on screen in the Point-of-Sale, the scale needs to be configured in terminal application.

Always Available

If this is enabled for the product, it ensures that the product is shown in the Point-of-Sale on every category panel selected. This means the operator is not required to locate the product. An example of this could be plastic carrier bags that most countries now charge for, enabling 'Always Available' ensures that operator can always find the product.

Manage Stock Levels

Chromis Administration

There may be times where the stock levels for a product do not need to be managed, for example plastic carrier bags, you do not need to do stock checks on these when you complete an inventory count.

Receipt required for warranty

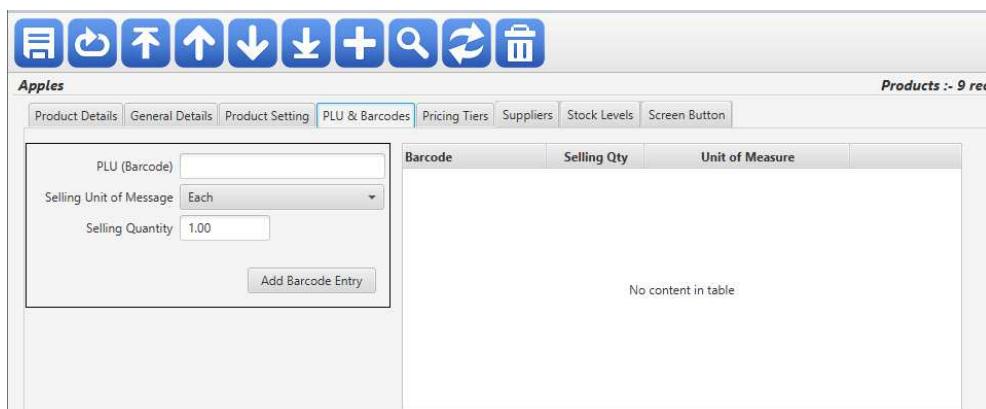
Chromis allows for receipts to be disabled for sales, however should there be a need to ensure that a receipt is issued for the purpose of a product warranty, enabling this will take precedence of the receipt off option.

Retire Product

In the event that a product will no longer be sold, the product can be retired using this option. Retiring a product does not remove it from the database, it just removes it from all views of active products and can no longer be sold.

PLU & Barcodes

Chromis supports the ability for a product to be assigned multiple barcodes.



There are a couple of reasons where this may be useful, let's consider them.

You buy a generic product for resale example 12" ruler, this may come from a number of different suppliers each having their own barcode.

A decision has been made that these will be sold for the same price regardless of the supplier, these can be created as individual products, or a single product which has each barcode assigned to it.

Another example is you sell a product that comes in variety of colours each which has a different barcode, you are not bothered about recording the sale of each colour but just the sale of the product as single item.

Chromis allows for a different quantity of the base product to be sold using a different barcode. An example is you buy the product in cases of 12, normally these are sold as a single item, the case of 12

Chromis Administration

may also be sold. Normally the case has a different barcode to allow the supplier to track these cases in their own internal processes.

The barcode on the case can be assigned to the base product but with a multiplier of 12.

On the 'PLU & Barcodes' tab,

Let's consider adding a barcode to an outer of 12.

Enter the new barcode

A screenshot of a software interface for entering barcode information. It shows three input fields: 'PLU (Barcode)' containing '21122361', 'Selling Unit of Message' set to 'Each', and 'Selling Quantity' set to '1.00'. Below these fields is a button labeled 'Add Barcode Entry'.

Now, a decision must be made to how this will be handled using the UOM, the recommended method is Select the Selling Unit of Measure as a 'Case of 12' (this assumes that the UOM has been created)

Set the 'Selling Quantity' to 1

A screenshot of the same software interface. The 'Selling Unit of Message' dropdown has been changed to 'Case of 12', which is highlighted with a blue selection bar. The other fields ('PLU (Barcode)' and 'Selling Quantity') remain the same as in the previous screenshot. The 'Add Barcode Entry' button is visible at the bottom.

Or leave the 'Selling Unit of Measure' as each and set the 'Selling Quantity' to 12

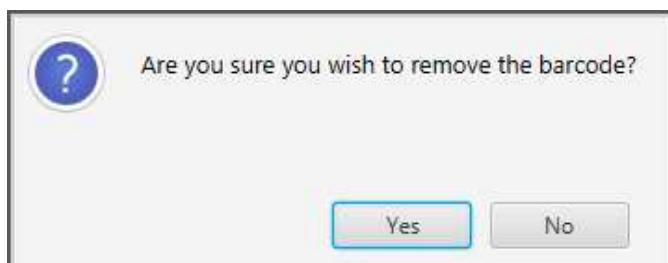
A screenshot of the software interface. The 'Selling Unit of Message' is set to 'Each' and the 'Selling Quantity' is set to '12'. The 'Add Barcode Entry' button is visible at the bottom.

Click 'Add Barcode Entry' to apply the new barcode

Chromis Administration

PLU (Barcode) <input type="text"/>	Barcode <input type="text"/>	Selling Qty <input type="text"/>	Unit of Measure <input type="text"/>
Selling Unit of Message <input type="text"/> Each	21122361	1.00	Case of 12
Selling Quantity <input type="text"/> 1.00			
<input type="button" value="Add Barcode Entry"/>			

To remove an additional barcode, right click on the barcode, you will be asked if you wish to delete the barcode.



Either confirm the removal or cancel it.

Pricing Tiers

Chromis allows products to be sold with prices that are changed based upon the quantity purchased. The application supports 5 levels of pricing. Tier pricing does not apply to variable priced or system products.

The screenshot shows the 'Pricing Tiers' tab selected for an 'Apples' product. The interface includes a toolbar with various icons and a navigation bar with tabs: Product Details, General Details, Product Setting, PLU & Barcodes, Pricing Tiers (selected), Suppliers, Stock Levels, and Screen Button. The main area displays five pricing tiers (Tier 1 to Tier 5) with fields for Quantity, Unit Price inc Tax, Unit Price, and Discount(%). Each tier has a 'Clear' button below it.

	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5
Quantity	<input type="text"/> 0				
Unit Price inc Tax	<input type="text"/> 0.00				
Unit Price	<input type="text"/> 0.00				
Discount(%)	<input type="text"/> 0.00				

When a product has a tiered pricing applied to it, the prices cannot be manually changed in the Point-of-sale using the edit product action.

Let's look at 2 levels of pricing

Chromis Administration

Apples

Pricing Tiers					
	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5
Quantity	3	5	0	0	0
Unit Price inc Tax	3.65	3.50	0.00	0.00	0.00
Unit Price	3.65	3.50	0.00	0.00	0.00
Discount(%)	7.59	11.39	0.00	0.00	0.00
	Clear 1 - 5	Clear 2 - 5	Clear 3 - 5	Clear 4 - 5	Clear 5

In the above the base product sells for 3.95, if the customer purchases 3 or more of the product they are charged 3.65 for each item, if they buy over 5 or more the price drops again to 3.50.

If you enter the details out of sequence, when the record is saved these will be rearranged in ascending order.

Apples

Pricing Tiers					
	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5
Quantity	3	0	9	4	0
Unit Price inc Tax	3.65	0.00	3.24	3.50	0.00
Unit Price	3.65	0.00	3.24	3.50	0.00
Discount(%)	7.59	0.00	17.97	11.39	0.00
	Clear 1 - 5	Clear 2 - 5	Clear 3 - 5	Clear 4 - 5	Clear 5

So, the above after saving becomes

Apples

Pricing Tiers					
	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5
Quantity	3	4	9	0	0
Unit Price inc Tax	3.65	3.50	3.24	0.00	0.00
Unit Price	3.65	3.50	3.24	0.00	0.00
Discount(%)	7.59	11.39	17.97	0.00	0.00
	Clear 1 - 5	Clear 2 - 5	Clear 3 - 5	Clear 4 - 5	Clear 5

Suppliers

Chromis supports supplier integration into the application, it does not just provide a supplier list but uses these to allow product ordering.

Chromis Administration

Apples

Products :- 7 records

Supplier Name	Supplier Code	Pack Size	Unit of Measure	Pack Cost
No content in table				

Product Details General Details Product Setting PLU & Barcodes Pricing Tiers Suppliers Stock Levels Screen Button

Supplier Stock Code
Pack Size Each
Pack cost 0.00
Add Supplier Entry

Reference Barcode Description Category Sell inc Tax Sell Price Buy Price Ingredient Auxiliary

Prior to assigning products a supplier, the supplier must have first been created in the supplier panel, once they have been created products can be assigned to them.

Open the Suppliers tab.

Supplier Stock Code
Pack Size Each
Pack cost 0.00
Add Supplier Entry

The supplier drop list is populated with all of the suppliers in the application marked as active.

Supplier Stock Code
Pack Size Each
Pack cost 0.00
Add Supplier Entry

Fruits unlimited
Local Produce Ltd
The Green Warehouse

Most suppliers have their own unique codes for the products they supply, enter this code into the 'Supplier Stock Code' field, this can be blank if there is no code.

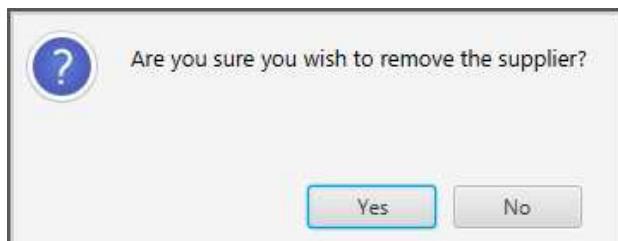
Chromis Administration

Supplier	Local Produce Ltd	<input type="button" value="▼"/>
Supplier Stock Code	lp-001-app	
Pack Size	Case of 12	<input type="button" value="▼"/>
Pack cost	<input type="text" value="3.65"/>	
		<input type="button" value="Add Supplier Entry"/>

Select the pack size that the product is sold in, (these must be already created in Units of Measure), finally the price of the product per pack size.

If the product can be purchased in multiple pack sizes these can all be entered as separate entries. Click 'Add Supplier Entry' to add the details into the supplier table.

To remove a supplier entry, right click on it



Confirm your action.

Once products have been assigned to a supplier, they can be ordered via the Suppliers or Orders panel.

Stock Levels

The application has the option to set stock levels to be maintained, for each location. (this feature will be implemented full in a future release).

Chromis Administration

The screenshot shows the 'Stock Levels' tab for the product 'Apples'. At the top, there are tabs for Product Details, General Details, Product Setting, PLU & Barcodes, Pricing Tiers, Suppliers, Stock Levels, and Screen Button. The Stock Levels tab is selected. On the left, there is a form with fields for Location (dropdown), Minimum Stock (text input: 0.00), and Maximum Stock (text input: 0.00). Below this is a button labeled 'Add Stock Level'. To the right is a table titled 'Products :- 7 records' with columns: Location Name, Current, Minimum, and Maximum. A message 'No content in table' is displayed. Below the table is a grid showing product details:

Reference	Barcode	Description	Category	Sell inc Tax	Sell Price	Buy Price	Ingredient	Auxiliary
Apples	Apples	Apples	General Products	3.95	3.95	0.000		
Default Product	DefaultProduct	General Product	General Products	0.00	0.00	0.000		
giftcard-sale	giftcard-sale	Gift Card Sale	Gift Cards	0.00	0.00	0.000		
giftcard-topup	giftcard-topup	Gift Card Topup	Gift Cards	0.00	0.00	0.000		
Loyalty Redeem	LoyaltyRedeem	Loyalty Voucher Redeem	Loyalty Cards	0.00	0.00	0.000		
Service Charge	ServiceCharge	Service Charge	General Products	0.00	0.00	0.000		
Steak	Steak	Steak	General Products	13.95	13.95	0.000		

Open the Stock Levels tab

The screenshot shows the 'Stock Levels' tab. On the left, there is a form with fields for Location (dropdown), Minimum Stock (text input), and Maximum Stock (text input). The dropdown menu for Location is open, showing options: 'Main Store' and 'Shop Front'. Below the dropdown is a button labeled 'Add Stock Level'.

Select the location from the dropdown list

Enter the Minimum and Maximum Stock levels for this location, click 'Add Stock Level' save the record into the levels table.

The screenshot shows a table with columns: Location Name, Current, Minimum, and Maximum. There is one record for 'Shop Front' with values: Current 0.0, Minimum 15.00, and Maximum 120.00. The table has several empty rows below the first record.

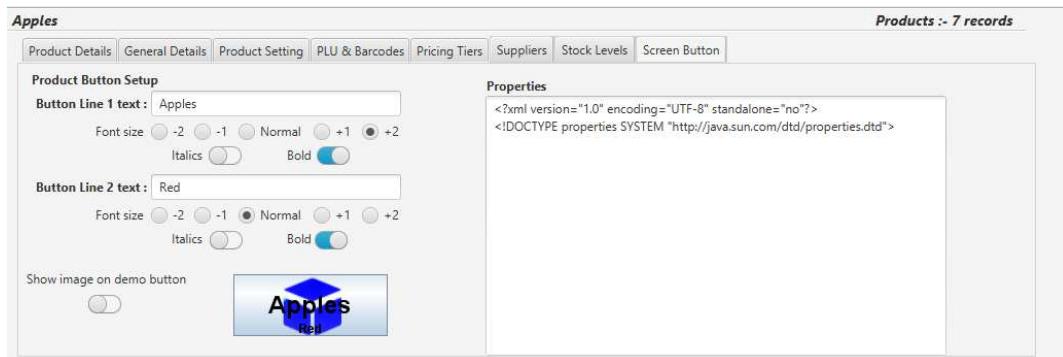
Location Name	Current	Minimum	Maximum
Shop Front	0.0	15.00	120.00

The table show the location, the current stock level, minimum and maximum levels. These minimum and maximum levels can be edited directly from the table if required.

Chromis Administration

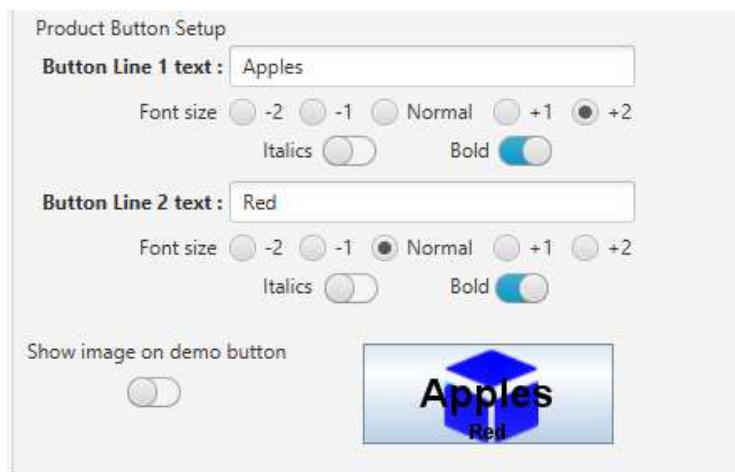
Screen Button

This tab maintains compatibility with earlier version of Chromis, it allows for the customization of the button shown in the product panel in Point-of-Sale.

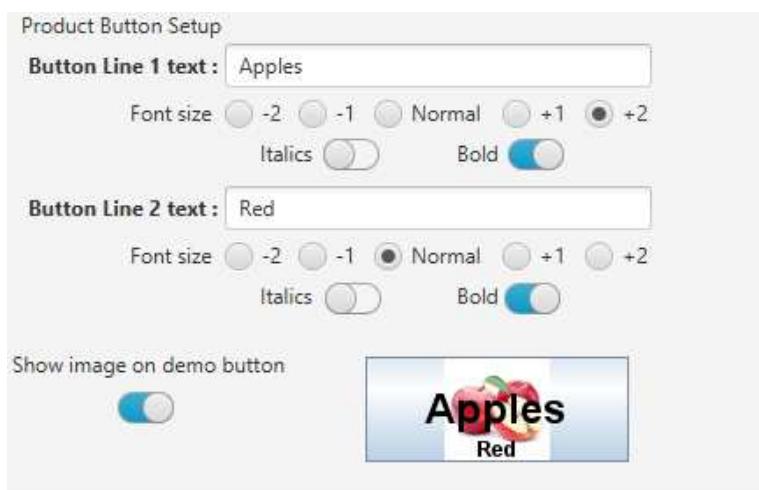


The button consists with a maximum of 2 lines, which have some basic display settings.

As part of the setup process a demo button is displayed using the details entered



Enabling the 'Show image on demo button' will display the image if provided.



The demo buttons should display what is seen in the products panel of the POS.



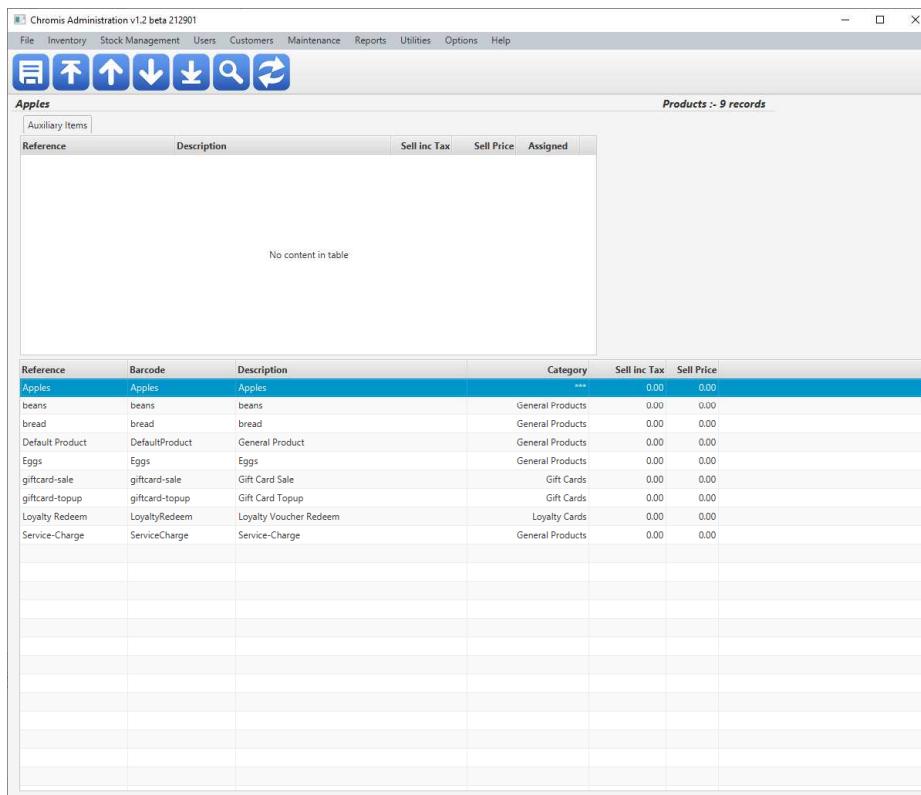
Auxiliary Items

Chromis Administration

As mentioned earlier in the manual an auxiliary item is a product that is associate with a product(s) and can be selected when the base product is sold.

The previous section explained how assign to make a product an auxiliary item.

Open the 'Auxiliary Item' from the menu 'Inventory – Auxiliary Items'



This panel shows a list of all the items that you have assigned as an auxiliary item, and in the lower table all of the products that the auxiliary items can linked with.

For the example products have been created that could be used in create your own pizza's.

Select the base product in the main table

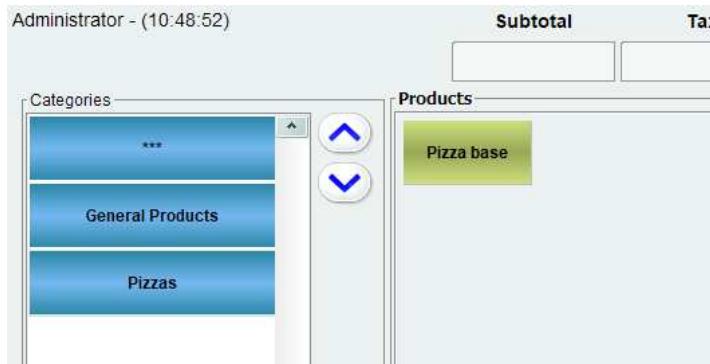
Reference	Barcode	Description	Category	Sell inc Tax	Sell Price
Apples	Apples	Apples	General Products	3.95	3.95
Pizza base	Pizza base	Pizza base	Pizzas	7.95	6.63
Steak	Steak	Steak	General Products	13.95	13.95

In the Auxiliary items table, the auxiliary items that are required as part of the offering can be assigned or removed, simply select assigned against the product.

Chromis Administration

Apples					
Auxiliary Items					
Reference	Description	Sell inc Tax	Sell Price	Assigned	
Mixed Cheese topping	Mixed Cheese topping	0.95	0.79	<input checked="" type="checkbox"/>	
Mushroom topping	Mushroom topping	0.75	0.63	<input checked="" type="checkbox"/>	
ham-topping	Pizza topping ham	0.95	0.79	<input checked="" type="checkbox"/>	
Sliced Onion Topping	Sliced Onion Topping	0.65	0.54	<input checked="" type="checkbox"/>	

When the base product is selected in the Point-of-Sale



The auxiliary items are displayed.



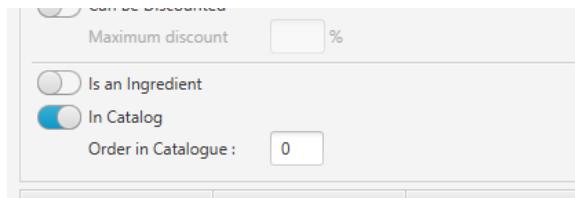


Recipes

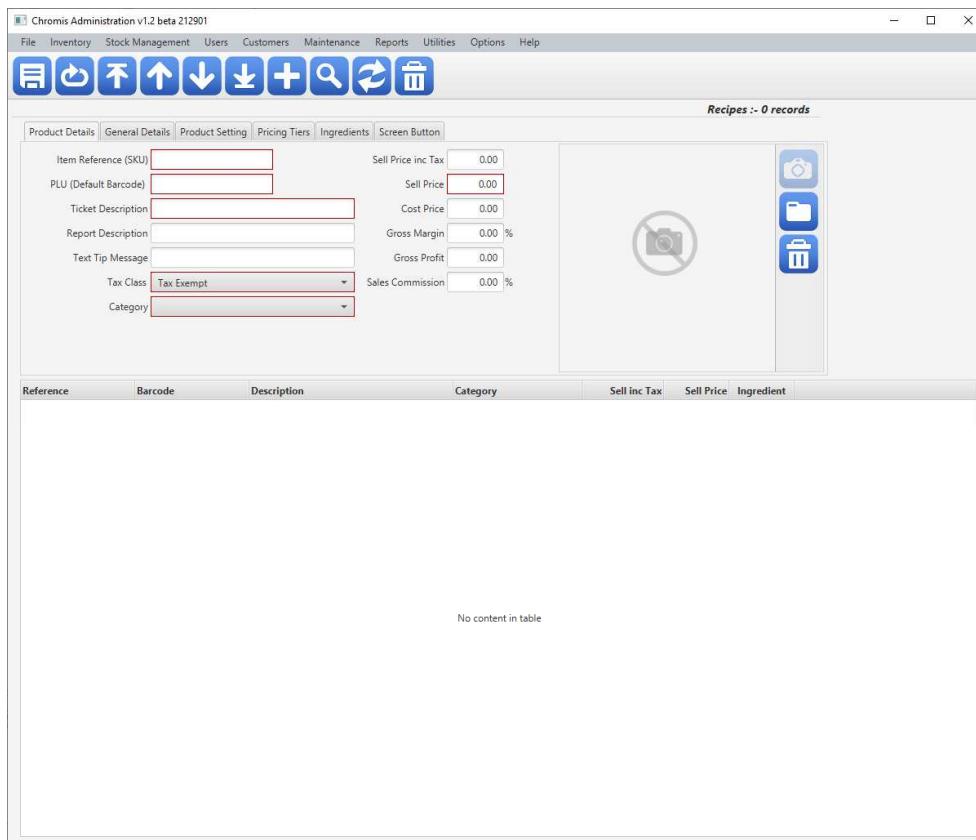
Chromis Administration

Chromis supports the use of recipes, which can be used to create a single product item composed of a number of other products. This could be a meal deal where the individual products are sold as part of the deal the customer makes a saving, or in a restaurant this could be all the ingredients that go into the meal sold.

When a product is created or edited, it can be assigned as an ingredient, if the product is solely meant to be an ingredient disable 'In Catalog' and it will not appear on the Point-of-Sale sales panel.



To create a new recipe, open the Recipe Panel menu 'Inventory – Recipes'



This panel is very similar to the main product panel, by the use of a separate panel it is easier to identify manage recipes. In this panel you cannot enter a cost price for the product this is calculated based upon the ingredients in the recipe.

The first stage is to create the recipe using the same rules as when creating a product. Lets start by creating a Cheese burger meal.

Chromis Administration

Label

Product Details General Details Product Setting Pricing Tiers Ingredients Screen Button

Item Reference (SKU)	CBMeal	Sell Price inc Tax	6.25
PLU (Default Barcode)	CBMeal	Sell Price	5.21
Ticket Description	Cheese Burger Meal	Cost Price	0.00
Report Description		Gross Margin	0.00 %
Text Tip Message		Gross Profit	5.21
Tax Class	Tax Standard	Sales Commission	0.00 %
Category	Fast Food		

Now select the ingredients tab.

Label

Product Details General Details Product Setting Pricing Tiers Ingredients Screen Button

Recipes :- 0 records

Reference	Description	Qty	Unit Cost	Cost
No content in table				

Using the product drop down list, select the ingredient to be added and the quantity. This list will show all of the products marked as an ingredient, but it excludes any which are already part of the active recipe.

For this meal a single cheese burger is needed

Label

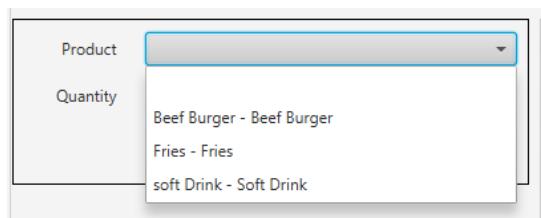
Product Details General Details Product Setting Pricing Tiers Ingredients Screen Button

Product	Cheese Burger - Cheese Burger
Quantity	1.00
<input type="button" value="Add Ingredient to recipe"/>	

Click 'Add Ingredient to recipe'

Chromis Administration

The selected product is now part of the recipe, if there is a need to adjust the quantity, it can be changed by editing the field in the table. Once an ingredient is added it is removed from the drop-down list.



To remove an ingredient right click and confirm the deletion, the delete ingredient will then be available again the selection list.

Complete the recipe

Reference	Description	Qty	Unit Cost	Cost
Fries	Fries	1.00	0.69	0.69
Cheese Burger	Cheese Burger	1.00	1.89	1.89
soft Drink	Soft Drink	1.00	0.63	0.63

When the recipe is saved the cost price of the product is calculated.

Cheese Burger Meal											
Product Details		General Details		Product Setting		Pricing Tiers		Ingredients		Screen Button	
Item Reference (SKU)	CBMeal	Sell Price inc Tax	6.25								
PLU (Default Barcode)	CBMeal	Sell Price	5.21								
Ticket Description	Cheese Burger Meal	Cost Price	3.21								
Report Description		Gross Margin	38.39 %								
Text Tip Message		Gross Profit	2.00								
Tax Class	Tax Standard	Sales Commission	0 %								
Category	Fast Food										

Chromis Administration

A recipe can also be an ingredient in another recipe, it cannot be an ingredient to itself.

If the cheese burger is made on site from the beef patties, cheese slices and buns, rather than being purchased at ready-made product, the cheeseburger can be a recipe. For the example let's make a double cheese burger.

Again, in the recipe panel create the recipe product

New Product

Product Details	General Details	Product Setting	Pricing Tiers	Ingredients	Screen Button
Item Reference (SKU)	DCheeseBurger	Sell Price inc Tax	4.25		
PLU (Default Barcode)	DCheeseBurger	Sell Price	3.54		
Ticket Description	Double Cheese Burger	Cost Price	0.00		
Report Description		Gross Margin	0.00 %		
Text Tip Message		Gross Profit	3.54		
Tax Class	Tax Standard	Sales Commission	0.00 %		
Category	Fast Food				

Select the 'Products settings' tab

New Product

Product Details	General Details	Product Setting	Pricing Tiers	Ingredients	Screen Button	Recipes :-
Enable kitchen printer and order screen options						
<input type="checkbox"/> Enable Order Printer			<input type="checkbox"/> Show an age warning when this product is selected			
<input type="checkbox"/> Enable Order Screen			<input type="checkbox"/> Required Age			
			<input type="checkbox"/> Can Be Discounted			
			<input type="checkbox"/> Maximum discount			%
			<input checked="" type="checkbox"/> Is an Ingredient			
			<input checked="" type="checkbox"/> In Catalog			
			<input type="checkbox"/> Order in Catalogue :			

Enable 'Is an Ingredient', and leave in Catalog, as this can be sold on its own.

Now select the ingredients tab and add the ingredients.

Reference	Description	Qty	Unit Cost	Cost
Beef Patty	Beef Patty	2.00	0.35	0.70
Burger Bap	Burger Bap	1.00	0.17	0.17
cheese slice	cheese slice	2.00	0.10	0.20

Chromis Administration

The main recipe table now shows this as an ingredient

Reference	Barcode	Description	Category	Sell inc Tax	Sell Price	Ingredient	
CBMeal	CBMeal	Cheese Burger Meal	Fast Food	6.25	5.21		
DCheeseBurger	DCheeseBurger	Double Cheese Burger	Fast Food	4.25	3.54	✓	
DB Cheese Meal	DB Cheese Meal	DB Cheese Meal	Fast Food	8.15	6.79		

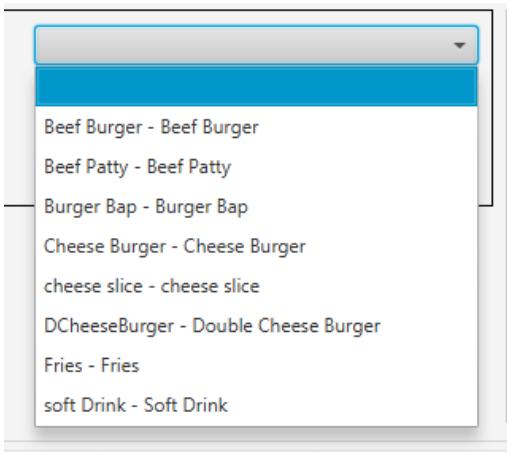
Now let's create a new meal deal with the double cheese burger.

New Product

Product Details General Details Product Setting Pricing Tiers Ingredients Screen Button

Item Reference (SKU)	DB Cheese Meal	Sell Price inc Tax	8.15
PLU (Default Barcode)	DB Cheese Meal	Sell Price	6.79
Ticket Description	DB Cheese Meal	Cost Price	0.00
Report Description		Gross Margin	0.00 %
Text Tip Message		Gross Profit	6.79
Tax Class	Tax Standard	Sales Commission	0.00 %
Category	Fast Food		

Now on the ingredients tab



The double cheese burger created is available for selection

Reference	Description	Qty	Unit Cost	Cost
DCheeseBurger	Double Cheese Burger	1.00	1.07	1.07
Fries	Fries	1.00	0.69	0.69
soft Drink	Soft Drink	1.00	0.63	0.63

Chromis Administration

A product cannot be converted to a recipe, so looking at the first example with the single cheeseburger meal. These cheese burger are no longer purchased in but assembled on site, so this now needs to be a recipe.

- Remove the product from the meal deal recipe.
- Edit the original cheese burger product, change its Ticket description etc. (this will allow the product to use the same name if required)
- Retire it from sale ‘Product Setting’ setting
- Create a new recipe for the cheese burger, this will have to be a different product from the original cheese burger.
- Add the new cheese burger to the recipe.



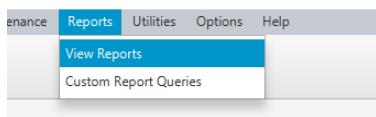
Reports

Chromis Administration

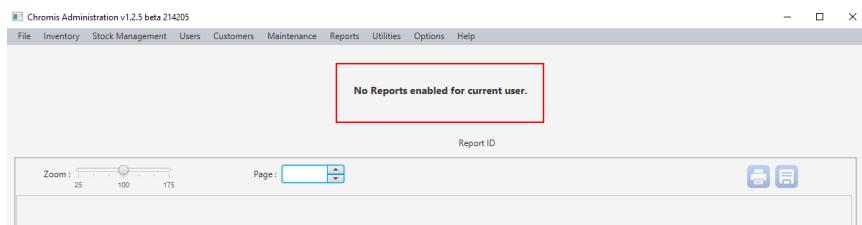
The ability to produce reports based upon the sales and stock etc, are an important part of any retail solution.

Chromis comes with a number of predefined reports, but also allows custom reports to be added by the users, the creation of these requires external software. Chromis uses Jasper Studio platform to produce the reports from the data available.

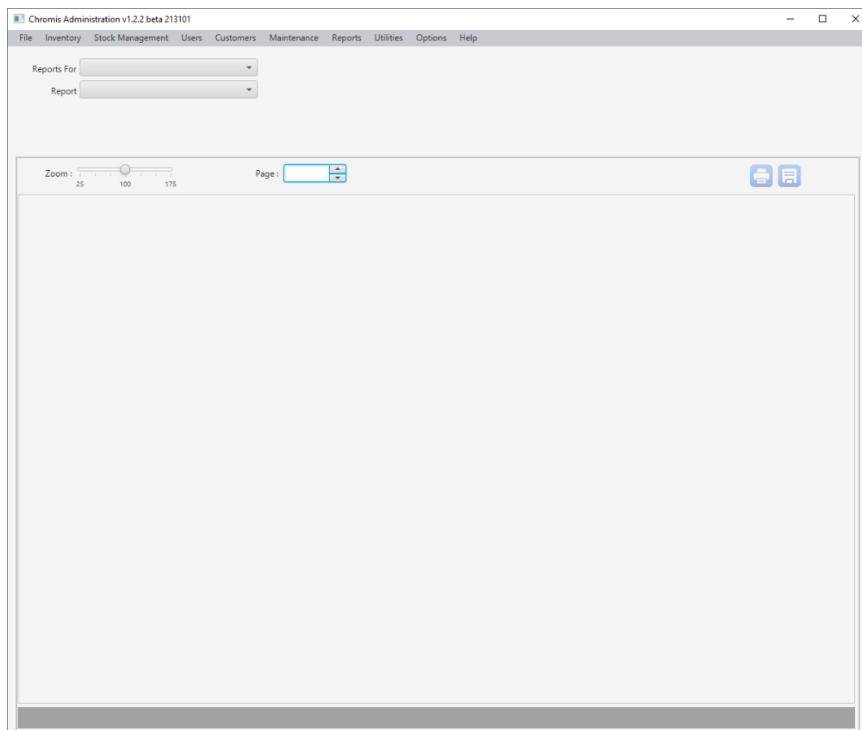
Access to the reports is via the normal menu options.



'Custom Report Queries' will be covered later.

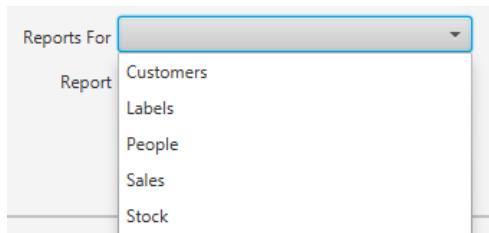


If the current user has not been granted access to any reports, the above screen is shown, otherwise the screen shown below can be seen.

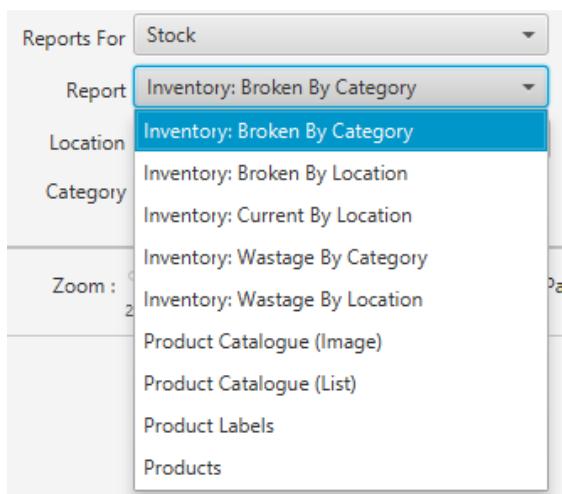


Chromis Administration

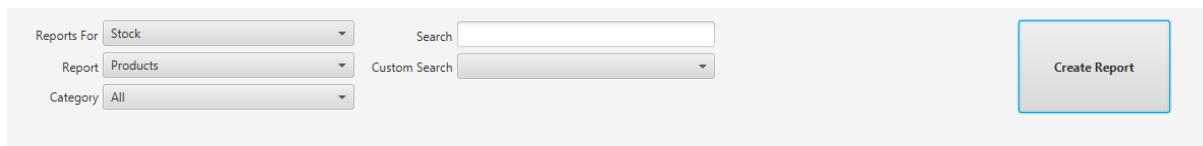
Upon opening the reports panel, the user is presented with two selection dropdowns, 'Reports for' & 'Report'. The 'Reports for' allows the selection of the area for which a report is required.



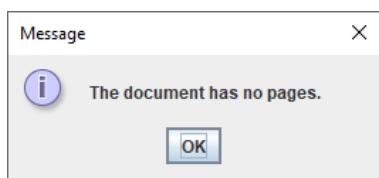
The 'Reports' dropdown is then populated depending upon the selection made here.



Once the Report type has been selected, the user than create the report by clicking on the 'Create Report# button that will now be displayed.



If there is no data available to produce the selected report, the user is informed.



If the report has data available, then it will be displayed in the main panel

Chromis Administration

The screenshot shows the Chromis Administration interface. At the top, there's a menu bar with File, Inventory, Stock Management, Users, Customers, Maintenance, Reports, Utilities, Options, and Help. Below the menu is a toolbar with 'Reports For' set to 'Stock', 'Search' input field, 'Report' dropdown set to 'Products', 'Custom Search' dropdown, and a 'Create Report' button. A status bar at the bottom shows 'report011' and the URL '/uk/chromis/reports/mysql/stock_products'. The main area displays a report titled 'Products' with a 'Printed' timestamp of '18 Aug 2021, 11:23:19'. The report is organized into sections: 'Alcohol', 'Fruit & Veg', 'General Products', 'Hardware', 'Meals', and 'Other'. Each section contains a table with columns: Reference, Barcode, Name, Tax Rate, Cost, Price Nett, Tax, and Price Gross. For example, under 'Alcohol', Beer has a barcode of 223232436376777, Name Beer, Tax Rate 20%, Cost £1.68, Price Nett £3.33, Tax £0.66, and Price Gross £3.99.

The number of pages in the report can be seen at the bottom of the panel.

Page : 1 of 2

At the top of the panel the user can zoom into the report or change the page if required.

Zoom : 25 100 175

Page : 1

The last options on the panel provides the ability to either print the report or save it to a PDF\HTML\PNG or XLSX file.



As part of any report the user, may be presented with a number of options, by which can filter the data.

Chromis Administration

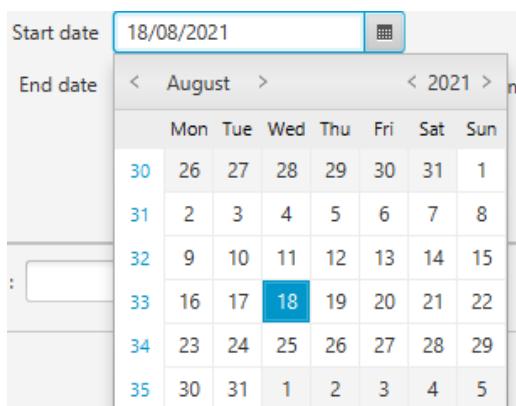
The first screenshot shows a detailed filter panel for 'Inventory: Wastage By Category'. It includes dropdowns for 'Reports For' (Stock), 'Report' (Inventory: Wastage By Category), 'Location' (All), and 'Category' (All). It also features date pickers for 'Start date' (18/08/2021) and 'End date' (18/08/2021), and buttons for 'Month' and 'Year'.

The second screenshot shows a simplified filter panel for 'Products'. It has dropdowns for 'Reports For' (Stock), 'Report' (Products), and 'Category' (All). It includes a search bar and a 'Custom Search' dropdown.

The third screenshot shows a filter panel for 'Sales'. It includes dropdowns for 'Reports For' (Sales), 'Report' (Cash Closed), and 'Category' (All). It features date pickers for 'Start date' (18/08/2021) and 'End date' (18/08/2021), and buttons for 'Month' and 'Year'.

The above show examples of the filter options, these are defined on a report-by-report basis.

When the date selection is present the user can use the date picker option to set the date ranges to use



The dates are initially set to the current date. In the event that the user is interested in the current month, selecting 'Month' set the start and ends dates for the month.

A date picker interface showing a specific month range. The 'Start date' is '01/08/2021' and the 'End date' is '31/08/2021'. Below the date fields are two buttons: 'Month' (highlighted with a blue border) and 'Year'.

Selecting year will set the dates for the entire year.

Chromis Administration

The screenshot shows a date range filter section. It includes two date input fields: 'Start date' set to '01/01/2021' and 'End date' set to '31/12/2021'. Below these are two buttons: 'Month' and 'Year', with 'Year' being highlighted with a blue border.

If the option to filter the report based on the 'Category' is allowed the selection will present all of the Categories in the system

The screenshot shows a dropdown menu for 'Category' with 'All' selected. The list includes: All, ***, Alcohol, Fruit & Veg, General Products, Gift Cards, Hardware, Loyalty Cards, and Meals.

And 'Location' displays the location options

The screenshot shows a dropdown menu for 'Location' with 'All' selected. The list includes: All, Main Store, and Warehouse Storage.

The only other filter is the search option. This allows for a more generic filter to be executed. The fields that form part of this search option are defined in the report definition file.

It is important that the user understands this search option, to assist with this consider the following products.

Reference	Barcode	Description	Category	Sell
Red Apples	Red Apples	Red Apples	Fruit & Veg	
Big Apples (green)	Big Apples (green)	Big Apples (green)	Fruit & Veg	
Apples	Apples	Apples	Fruit & Veg	

The simplest form is the exact match, the user enters the string that forms part of the filter.

Chromis Administration

Search

Custom Search

The example above searches the data for the word 'Apples' (all searches are case insensitive). The following report would be created.



Products

Fruit & Veg

Reference	Barcode	Name	Tax Rate	Cost	Pri
Apples	Apples	Apples	0%	£0.00	

If the user needs all Apples, regardless of their type wildcard searches can be used. The wild card identifier is that used by SQL queries '%'.

Search

Custom Search

This search would produce the following



Products

Fruit & Veg

Reference	Barcode	Name	Tax Rate	Cost	Pri
Apples	Apples	Apples	0%	£0.00	
Red Apples	Red Apples	Red Apples	0%	£0.00	

Because the wildcard precedes the word 'Apples' the search checks for matches that start with any number of characters, but they must end with 'Apples'.

The above shows that there is still a product missing, to include the searches need to be told that the word 'Apples' can be anywhere in the data. This is achieved by both prefixing and suffixing the word 'Apples' with the wildcard character.

Search

Custom Search

Resulting in the following.

Chromis Administration



Products

Fruit & Veg

Reference	Barcode	Name	Tax Rate	Cost
Apples	Apples	Apples	0%	£0.00
Big Apples (green)	Big Apples (green)	Big Apples (green)	20%	£0.00
Red Apples	Red Apples	Red Apples	0%	£0.00

The basic search only allows for a single search entry, if a more complex search is required then a deeper understanding of the SQL data query for the report is required.

If the required result is for 'Big Apples (Green)' and 'Red Apples' it cannot be achieved using this basic search.

The search supports the option to pass in some SQL code, but the user must have access to the raw SQL query for the report.

Search

Custom Search

The above shows how it is possible to pass into the search raw SQL code, if the search contains '!' as its first character, the remaining part of the entry is used to populate the search query rather than it being created from the filter.



Products

Fruit & Veg

Reference	Barcode	Name	Tax Rate	Cost
Big Apples (green)	Big Apples (green)	Big Apples (green)	20%	£0.00
Red Apples	Red Apples	Red Apples	0%	£0.00

Another example could be to get the products where tax rate = 20%

Search

Custom Search

Chromis Administration

The screenshot shows a software interface titled 'Products'. At the top left is the Chromis logo. Below it, a table header for 'Fruit & Veg' lists columns: Reference, Barcode, Name, and Tax Rate. A single row is shown: 'Big Apples (green)' under all four columns. The 'Name' column contains a link 'Big Apples (green)'. The 'Tax Rate' column contains '20%'.

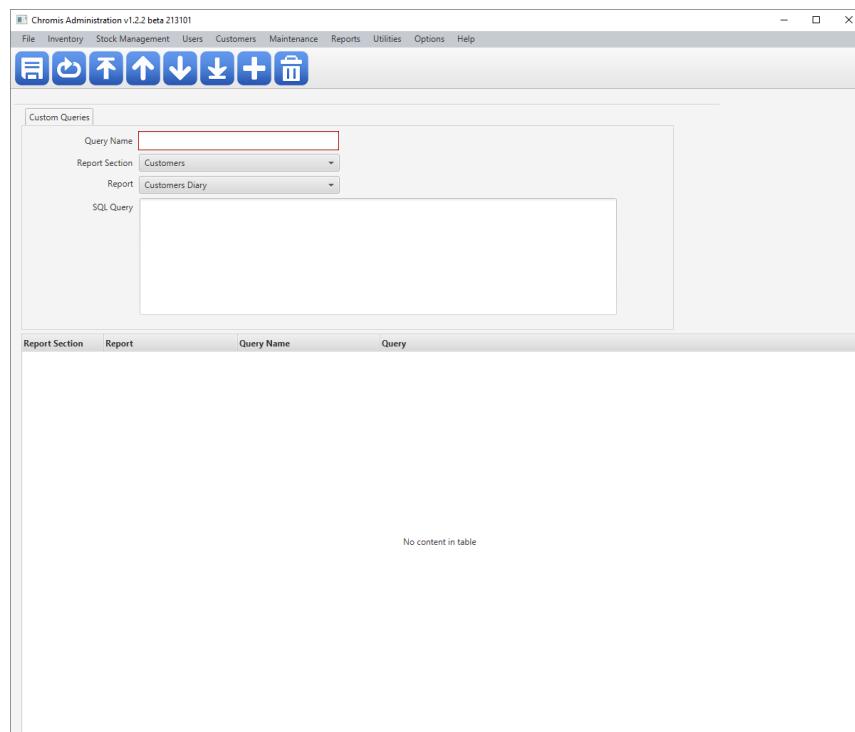
Fruit & Veg			
Reference	Barcode	Name	Tax Rate
Big Apples (green)	Big Apples (green)	Big Apples (green)	20%

This option provides some flexibility for the filter.

Hold on, what if the user does not understand SQL?

If there are a number of filters that the user may be required to perform on a regular basis, there is the option for someone with correct access rights to create some custom searches (Custom Report Searches).

Open the 'Custom Report Searches'.



A 'Custom Report Search' can only be created for a report that has the search option enabled. It is essential that the creator has a basic understand of SQL.

However, to understand what a 'Custom Report Search' exactly is, you need to start with the report files.

Each report consists of 2 files

- ReportName.bs
- ReportName.jrxml

Chromis Administration

The bs file is a java-based file that is read by a script engine used in Chromis. These files are located in the ‘reports\mysql\’ folder. Using the bs that was used in the previous section to create the report.

```
report = new uk.chromis.administration.reporting.ReportBean();
report.setReport("/uk/chromis/reports/mysql/stock_products");

report.setQuery("select "
    + " p.reference, "
    + " p.code, "
    + " p.codetype, "
    + " p.name, "
    + " p.pricebuy, "
    + " p.pricesell, "
    + " p.pricesellinc, "
    + " tc.name as taxcatname, "
    + " t.rate, "
    + " c.name as categoryname "
    + " from products as p "
    + " left outer join categories as c on p.category = c.id "
    + " left outer join taxcategories tc on p.taxcat = tc.id "
    + " left outer join taxes as t on p.taxcat = t.category "
    + " where p.iscatalog = true and ?(QBF_FILTER) "
    + " order by c.name, p.name");

report.setCategory("p.category");

report.addSearchField("p.reference");
report.addSearchField("p.code");
report.addSearchField("p.name");

report.includeLogo(true);
report;
```

The area of interest is the query

```
select
p.reference,
p.code,
p.codetype,
p.name,
p.pricebuy,
p.pricesell,
p.pricesellinc,
tc.name as taxcatname,
t.rate,
c.name as categoryname
from products as p
left outer join categories as c on p.category = c.id
left outer join taxcategories tc on p.taxcat = tc.id
left outer join taxes as t on p.taxcat = t.category
where p.iscatalog = true and ?(QBF_FILTER)
order by c.name, p.name
```

Chromis Administration

In the query there is an area ?(QBF_FILTER), it is this area that your query will replace during execution. The query that is created becomes part of the where clause.

By default, the where function will only use the fields passed as search fields.

```
report.addSearchField("p.reference");
report.addSearchField("p.code");
report.addSearchField("p.name");
```

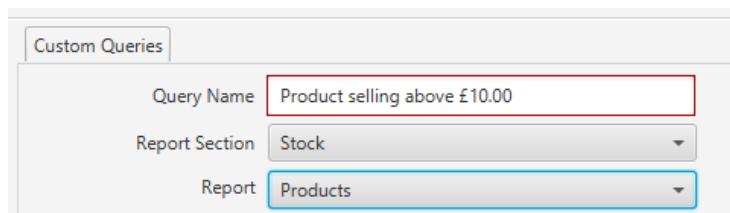
Using the custom report queries, the where clause can be expanded to cover any field in the query, if the passed are to be used they need to be specified as part of the custom query.

Let's consider a search that will report return products using the query where the selling price including taxes is above a certain value.

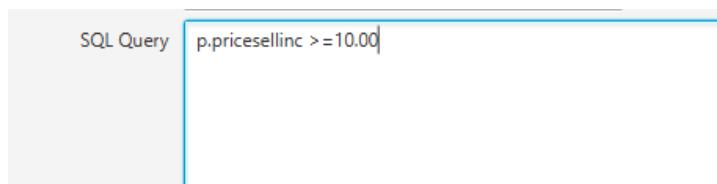
Start by creating a new entry using  icon.



Supply a friendly name for the query, and then select the report that it will be applicable for.



Now build the query in the SQL Query box



Save the entry.

A query can only be made available to single report, if the same query is required for multiple reports, then a copy must be made for each report.

Back in the reports panel, if the report created using all of the defaults, the following is produced.

Chromis Administration



Products

Printed
18 Aug 2021, 19:32:40

Alcohol							
Reference	Barcode	Name	Tax Rate	Cost	Price Nett	Tax	Price Gross
Beer	223232436376777	Beer	20%	£1.68	£3.33	£0.66	£3.99
Gin	2353453422112	Gin	20%	£8.65	£13.29	£2.66	£15.95
Whiskey	65656336487214	Whiskey	20%	£0.00	£11.63	£2.32	£13.95

Fruit & Veg							
Reference	Barcode	Name	Tax Rate	Cost	Price Nett	Tax	Price Gross
Apples	Apples	Apples	0%	£0.00	£3.95	£0.00	£3.95
Big Apples (green)	Big Apples (green)	Big Apples (green)	20%	£0.00	£3.29	£0.66	£3.95
Red Apples	Red Apples	Red Apples	0%	£0.00	£3.95	£0.00	£3.95

General Products							
Reference	Barcode	Name	Tax Rate	Cost	Price Nett	Tax	Price Gross
Service-Charge	ServiceCharge	Service-Charge	0%	£0.00	£0.00	£0.00	£0.00

Hardware							
----------	--	--	--	--	--	--	--

If the 'Custom Search' is applied

Reports For Stock

Report Products

Category All

Search

Custom Search Product selling above £10.00

Then report creation produces the following.



Products

Printed
18 Aug 2021, 19:37:15

Alcohol							
Reference	Barcode	Name	Tax Rate	Cost	Price Nett	Tax	Price Gross
Gin	2353453422112	Gin	20%	£8.65	£13.29	£2.66	£15.95
Whiskey	65656336487214	Whiskey	20%	£0.00	£11.63	£2.32	£13.95

To logo is held in the company.png, located in the configuration folder, this 271 x 50 pixels in size, if the logo is too large it will be resized.

To disable the open the .bs file for report and change the report.includeLogo to

```
report.includeLogo(false);
```

or remove it completely.



Report Creator Assistant

Chromis Administration

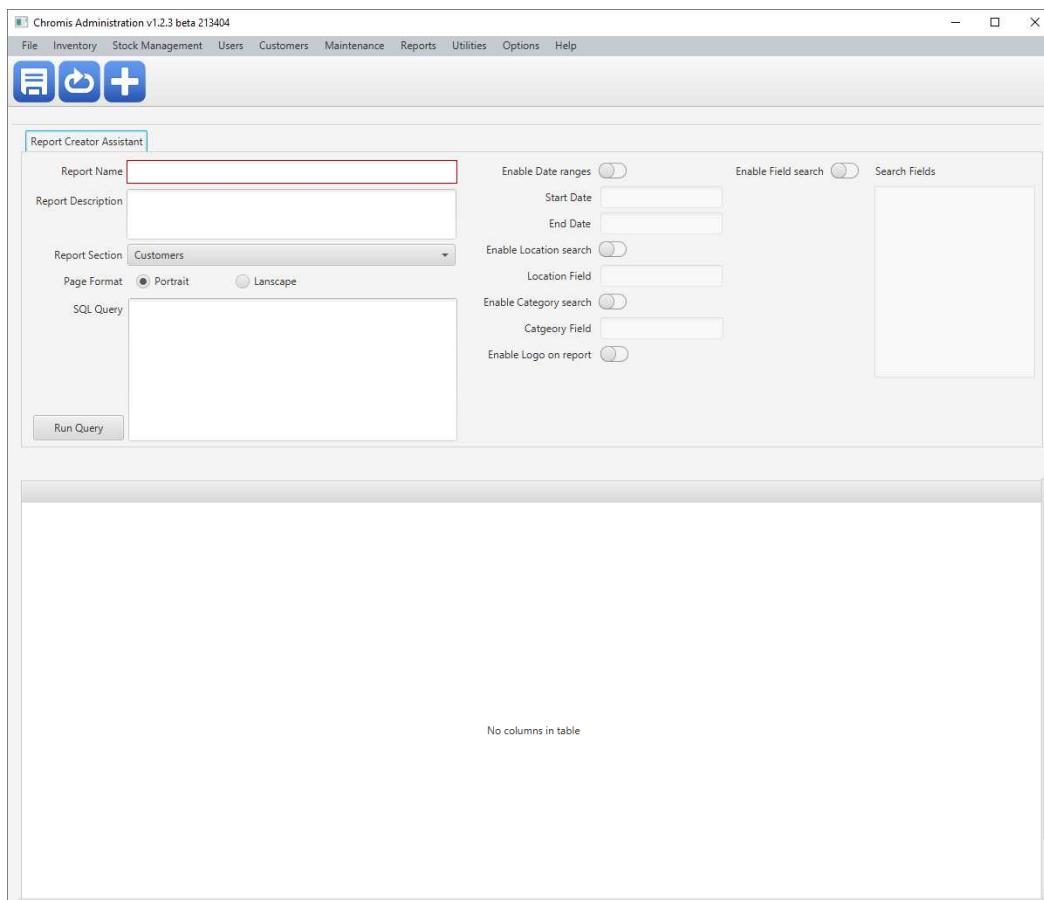
There are going to be times when a custom report needs to be created. If that is a requirement Jasper Studio is required to create the report layout.

It is important to note that there is NO intention to teach how to use Jasper Studio to produce reports. It is assumed that the creator has an understanding of how to use Jasper and SQL.

This section of Administration is designed help the creator in producing the base files that are required to create a report. It does not provide the ability to modify existing reports, these must be modified directly from the files.

Some of the details that compose the bs file, where mentioned in the previous section.

Let's talk a quick tour of the Report assistant panel.



Each report must have a unique name, it is this name that is used for the filename.

The filename must not contain spaces, special characters or start with a number, these are checked during the save process.

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The screenshot shows the 'Report Creator Assistant' window. It includes fields for 'Report Name' (with a red border), 'Report Description', 'Report Section' (set to 'Customers'), 'Page Format' (with 'Portrait' selected), and a large 'SQL Query' text area. A 'Run Query' button is at the bottom left.

A description should be added as this is used when allowing access in the 'Roles' creation section.

The report must be allocated to a report section, this is selected from the dropdown option.

When the a reported is created, a template is used to create the base jasper report file. There are 2 template page formats, the page format is used to jasper file.

The query is the key element of any report, it is the result set from this, which will form the core data feed into the report.

Every query must contain a 'where' entry with **?(QBF_FILTER)**, this must only be added to the query prior to saving the report. The **?(QBF_FILTER)** is used by the report generator to pass in any custom filters the user may specify.

The query can be tested by clicking 'Run Query', there is some element of protection on testing the query.

- Destructive commands are not allowed
 - Delete, truncate, drop etc
- Insert statement into the database are not allowed
- Update statements for the database are not allowed
- Alter table commands are not allowed
- Revoke and grant commands are not allowed

Let's look at a quick example of a query

```
select
p.reference,
p.name,
p.pricebuy,
p.pricesell,
(sum(t.units)) as units,
(sum(t.priceexc * t.units)) as subtotal,
(sum(t.priceinc * t.units)) as grosstotal,
```

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```
(sum(t.priceinc * t.units)) - (sum(t.priceexc * t.units)) as taxes
from ticketlines as t
left outer join products as p on t.product = p.id
left outer join tickets as ti on ti.id = t.ticket
left outer join receipts as r on r.id = ti.id, taxes
where r.id = ti.id
and ti.id = t.ticket
and t.product = p.id
and t.taxid = taxes.id
group by p.reference, p.name, p.pricebuy, p.pricesell
order by gross total desc limit 10
```

This query will run the script used by the 10 ten sales report, the above does not include the QBF_FILTER, there would not produce a date based report.

If this entered in the query field and run, the table will be populated with the data returned, this provides a view of the data which will be used.

reference	name	pricebuy	pricesell	units	subtotal	gross total	taxes
Default Product	General Product	0.0	0.0	9.0	474.575	569.49	94.915
Whiskey	Whiskey	0.0	11.63	22.0	255.86	306.954	51.094
Apples	Apples	0.0	3.95	56.0	221.2	221.2	0.0
Red Apples	Red Apples	0.0	3.95	13.0	51.35	51.35	0.0
Beer	Beer	1.68	3.33	6.0	19.98	23.958	3.978

This report gives the expected results so the QBF_FILTER must be added into the query. The where parameter already exists, this needs to be extended to add the filter.

The existing where section

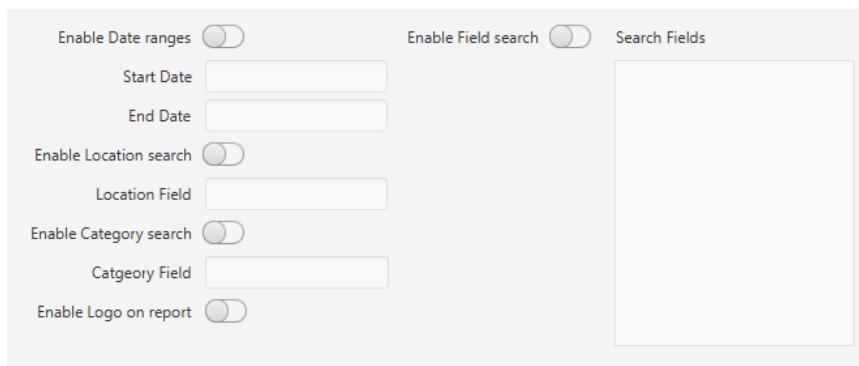
```
where r.id = ti.id
and ti.id = t.ticket
and t.product = p.id
and t.taxid = taxes.id
```

This where needs to be retained, so the filter is added to the end of the clause.

```
where r.id = ti.id
and ti.id = t.ticket
and t.product = p.id
and t.taxid = taxes.id
and ?(QBF_FILTER)
```

Using the same report, now we need to allow the generator to pass in variables into the query.

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For the above report to work with a date range, the Date range must be enabled.

The above query does not provide any reference to any date fields, but if the database is studied it will become apparent that the receipts table has a transaction date field 'datenew'

Result Grid			
Filter Rows:			
COLUMNS			
id	money	datenew	person
02a20150-9ec7-4319-a720-be1eae709d11	58eee061-dc48-4b84-882f-ef55822a9516	2021-08-20 13:50:10	5bab3120-1804-42fb-9c30-d2581637dda0
055d7803-943e-4993-85b0-ea22291961ed	58eee061-dc48-4b84-882f-ef55822a9516	2021-08-20 14:22:44	5bab3120-1804-42fb-9c30-d2581637dda0
06709d2a-6a7e-484a-8cc1-e4e91da543e7	58eee061-dc48-4b84-882f-ef55822a9516	2021-08-20 13:45:21	5bab3120-1804-42fb-9c30-d2581637dda0
0df9a583-9cd7-4a5c-b8f3-7be3fc2c6041	58eee061-dc48-4b84-882f-ef55822a9516	2021-08-20 13:47:32	5bab3120-1804-42fb-9c30-d2581637dda0
0e305434-8c44-463d-b938-2639c6f34acd	58eee061-dc48-4b84-882f-ef55822a9516	2021-08-20 21:53:48	5bab3120-1804-42fb-9c30-d2581637dda0
0e3ddd4f-f656-4520-afad-27cdbd8888b6	58eee061-dc48-4b84-882f-ef55822a9516	2021-08-20 09:22:07	5bab3120-1804-42fb-9c30-d2581637dda0
0f222100-6011-44c5-8526-ff5002220f16	58eee061-dc48-4b84-882f-ef55822a9516	2021-08-20 09:22:07	5bab3120-1804-42fb-9c30-d2581637dda0

This field can be used to limit the data to dates with a range.

It is also apparent that the receipt table is aliased in the query to 'r', so to get at the field we need to use 'r.datenew'. It is this reference that needs to be passed into the query.

Enable the Date ranges. And enter the above into the start and end date boxes.

This will replace the QBF_FILTER with when the report is run and date are passed.

`(r.datenew >= {ts '2021-08-01 00:00:00.000'} and r.datenew < {ts '2021-08-31 23:59:00.000'})`

Filtering the result between the dates passed by the user.

The same principle applies to the other enable options as well.

The logo can be enabled on the report using the option.

When the report is saved the .bs file is created using the options completed on the panel and the base jasper file is also produced. These base jasper files only contain the report header details.

Remember that access must be granted to the users before it can be used. When granting access to the report description will not show until the application has been restarted.



Product Price Scheduler

Chromis Administration

There may be times where a supplier increases all of their pricing, this is usually followed by the retailers increasing the prices. The retailer would normally need to update all of the prices on the date of increase.

Chromis provides the ability to implement a pricing scheduler, all of the prices can be updated in advance and a date supplied when this should occur.

The screenshot shows the Chromis Administration software interface. The main window title is "Chromis Administration v1.00 Beta 2104-11". The menu bar includes File, Inventory, Stock Management, Users, Customers, Maintenance, Utilities, Options, and Help. Below the menu is a toolbar with icons for file operations (New, Open, Save, Print, Find, etc.) and a search icon. The current screen is titled "Cheese Burger" under "Product Details". It displays a table of products with columns: Reference, Barcode, Description, Category, Sell inc Tax, Sell Price, and Buy Price. One row for "Cheese Burger" is highlighted. At the bottom of the table is a "Price Change Date" field set to "31/05/2021".

Reference	Barcode	Description	Category	Sell inc Tax	Sell Price	Buy Price
34232	3245r324	32453215	Fast Food	3.65	3.65	0.00
Apples	Apples	Apples	General Products	3.95	3.95	0.00
Beef Burger	Beef Burger	Beef Burger	Fast Food	2.95	2.46	1.130
Beef Patty	Beef Patty	Beef Patty	Fast Food	0.00	0.00	0.350
Burger Bap	Burger Bap	Burger Bap	Fast Food	0.00	0.00	0.170
Cheese Burger	Cheese Burger	Cheese Burger	Fast Food	3.25	2.71	1.890
cheese slice	cheese slice	cheese slice	Fast Food	0.00	0.00	0.100
Fries	Fries	Fries	Fast Food	1.95	1.63	0.690
ham-topping	ham-topping	Pizza topping ham	Pizzas	0.95	0.79	0.000
Mixed Cheese topping	Mixed Cheese topping	Mixed Cheese topping	Pizzas	0.95	0.79	0.000
Mushroom topping	Mushroom topping	Mushroom topping	Pizzas	0.75	0.63	0.000
Pizza base	Pizza base	Pizza base	Pizzas	7.95	6.63	0.000
Sliced Onion Topping	Sliced Onion Topping	Sliced Onion Topping	Pizzas	0.65	0.54	0.000
soft Drink	soft drink	Soft Drink	Fast Food	2.25	1.88	0.630
Steak	Steak	Steak	General Products	13.95	13.95	0.000

Open 'Utilities – Product Price Scheduler', select the product that should be updated.

This screenshot shows the "Product Price Scheduler" screen. It has tabs for "Product Details" and "Pricing Tiers". The "Product Details" tab is active. The product details shown are: Item Reference (SKU) 34232, PLU (Default Barcode) 3245r324, Ticket Description 32453215, Tax Class set to "Tax Exempt", and Price Change Date 31/05/2021.

The following information can be scheduled

- Tax Class

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- Sell Price inc Tax
- Sell Price
- Cost Price
- Pricing Tiers

Once the new data has been supplied the final step is to set the date that the update should occur. The scheduler checks for any changes to be applied every 6 hours that the database is running.



Import Data

Chromis Administration

Chromis provides the option to import data from csv files into the system. When using this option if the data does not exist in the database, it will be created. If it is present the record will be updated.

This panel provides the ability import data into the database, the icons actions are listed below.



Select and Open file for import



Refresh the Imported Data



Clears the imported data and resets the fields



Import the data into the database



Save the mapping profile allowing to re-used

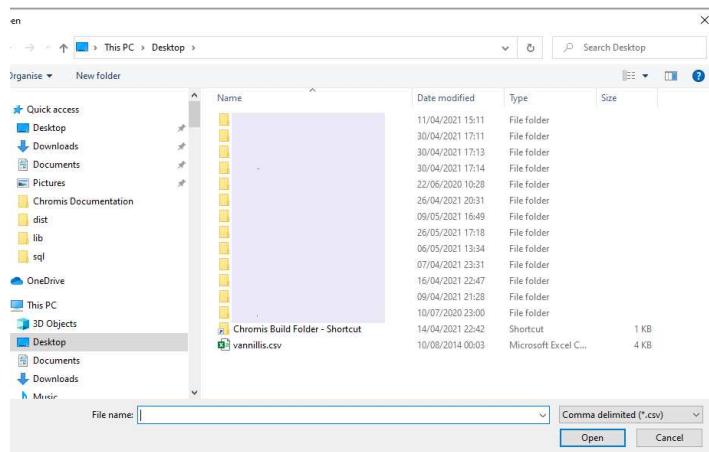
This is still under further development; currently only product data is supported.

Importing a csv

The screenshot shows the 'Import File Details' tab selected in a navigation bar. Below it, there's a 'Selected File' input field, a 'First Row is header' toggle switch, and an 'Import Option' dropdown set to 'Insert into Products'.

Click to open the file explorer.

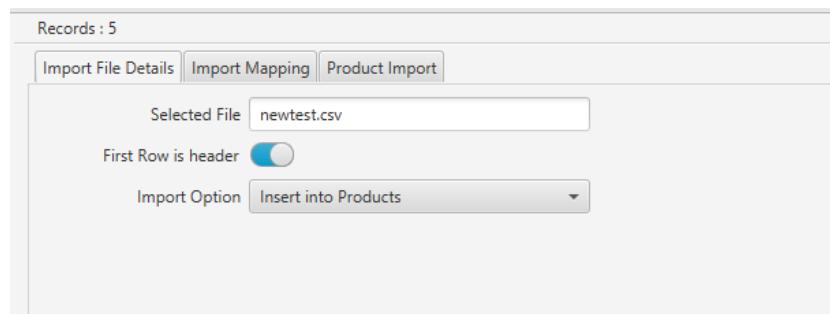
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Select the file that will be imported. The main table is populated with the data from the file.

If the imported file has 1st row header, this can become the column headers, either prior to the import by refreshing the data.

Enable ‘First row is header’



If this is done after import click  to refresh the import. The first row will be removed and become the column headers.

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As more tables are made available for the import, they will be selectable from the import option. When 'Insert into Products' is selected the 'Product Import' tab becomes visible.

The next stage is to map the data from the import file into the database.

Open 'Import Mapping' tab

Records : 4

Import File Details Import Mapping Product Import

Source data column	Data target field	Data Type
No content in table		

Available Profiles

Source data column

Data target field

Add mapping entry

If this is the first run of the import, there will be no profiles to import, Chromis allows any mappings created to be saved as a profile, this means if a new file is received using the same format and the mapping profile was saved before, the profile can be used.

Source data column

Data target field

Add mapping entry

The source date column is the header details from the imported file.

Source data column

Data target field

Name
Retail
Barcode
reference
cost

Select the column from the source.

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The screenshot shows the 'Import File Details' tab selected. On the left, there's a table with columns 'Name', 'Retail', and 'Barcode'. The 'Retail' column contains values like '0', '1.55', '2', and '0'. To the right, a dropdown menu titled 'Source' lists various product attributes such as 'Age Restriction', 'Auxiliary Item', 'Button Text', etc., with 'Taxe' highlighted. Below the table is a list of items.

Name	Retail	Barcode
Baby Cone	0	Ice
Kids Cone	1.55	Ice
Small Cone	2	Ice
Regular Cone	0	Ice

- Age Restriction
- Auxiliary Item
- Button Text
- Buy Price
- Default Stock Location
- Is an Ingredient
- Is in Catalog
- IsService Item
- Managed Stock
- Managed Stock Location

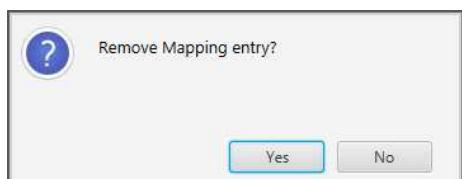
Next select the target field the data will be mapped to.

The screenshot shows the 'Import Mapping' tab selected. It displays a table with three columns: 'Source data column', 'Data target field', and 'Data Type'. The first row maps 'Retail' to 'Sell Price (incl tax)' with type 'Double'. The second row maps 'Name' to 'Ticket Description (Product Name)' with type 'String'.

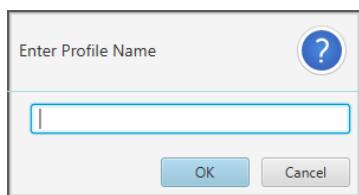
Source data column	Data target field	Data Type
Retail	Sell Price (incl tax)	Double
Name	Ticket Description (Product Name)	String

Complete the mapping until all the columns required are mapped.

If a column is mapped incorrectly in needs to be removed for the mapping table, right click on the entry.



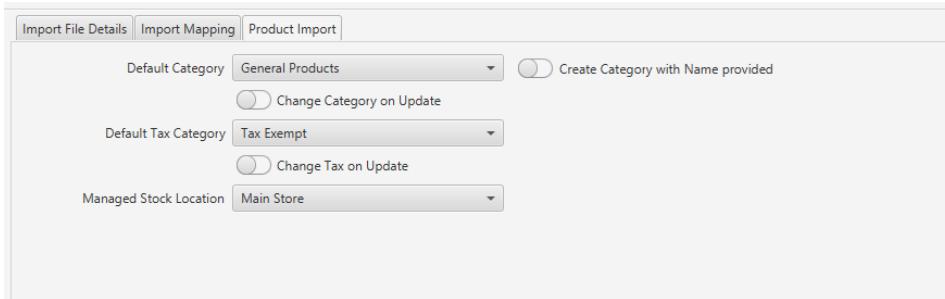
If the import profile is to be saved click the disk icon and enter the name for the profile.



Once saved the import profile needs to selected and imported, to delete an entire profile, select it and then click 'Delete Profile'

Product Import tab

This tab provides specific rules for product mapping.



Category, if there is no category supplied as part of the import, the category selected will be used for the products. In the event that a category is supplied, it must match the name of a category already in the system. If the category does not exist, it can be created as part of the process by enabling 'Create Category with Name provided', this is the name provided in the import table.

If the record already exists the products Category could be changed, if this is required enable the option 'Change Category on Update'.

The default Tax Category is the tax rate that will be applied to the product is not provided as part of the import process.

If the record already exists the products Tax rate could be changed, if this is required enable the option 'Change Tax on Update'.

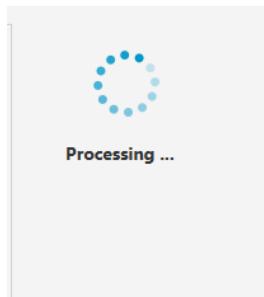
There are some further rules for the Tax rate and selling price.

- If no selling price is supplied for both Tax inclusive and Tax exclusive, they are left as supplied.
- If a selling price is provided for either of the 2 selling prices, these are recalculated using the tax rate assigned. The system first checks for a selling price inclusive of Tax and calculates the tax exclusive price with the assigned Tax rate.
- If there is no tax inclusive price, this is calculated using the tax exclusive price and adds the correct tax rate to it.

If the flag to manage stock is mapped and set to true, the default location is used by the import process unless specified in the import data, Should the location specified not exist the location in the selection box is used.

When the data is ready to be imported, select the import icon while the import process is running as progress indicator is displayed

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Once the process is complete the products will be removed from the import table, any product where an issue was encountered will remain, with an indication of the error encountered.

Name	Retail	Barcode	reference	cost	category	Taxes	excluding	managed	location		
Baby Cone		Ice001	Ice001	0.5	***	Tax Standard	0	TRUE	Main Store	Double Number Error	
Kids Cone	1.55		Ice002	0.5	***	Tax Standard	0	TRUE	bad store	Barcode Data Error, no data supplied	
	2		Ice003	0.5	***	Tax Standard	2	TRUE	Main Store	Product Name Error, no name supplied	
Regular Cone	0		Ice004		0.5	***	Tax Standard	2.95	true	Main Store	Reference Data Error, no data supplied

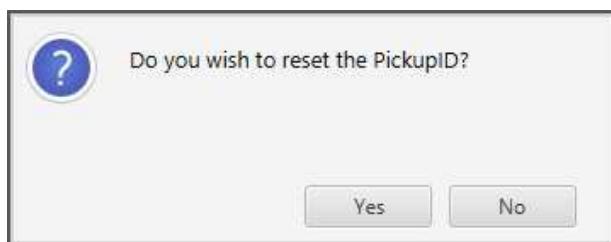
The data in the imported table can be changed or the row removed. To remove the entire row right click and confirm the removal.

To change the data, double click of the table cell and enter the new data, to confirm the data, enter must be used, moving to another cell with using enter restores the previous data.

The import process can then be run again on the remaining data.

Reset Pickup Counter

If the Pickup ID is being used and needs to be reset, this done using 'Utilities – Reset Pickup Counter'.



Database Backup

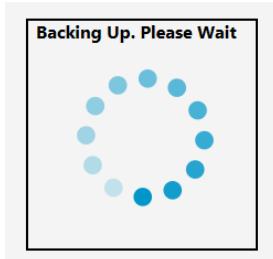
It is important that a regular backup is made of the database, just in case of the event that it is ever needed.

Chromis has the ability to perform a manual backup of its database, this function is available via 'Utilities – Backup Database'.

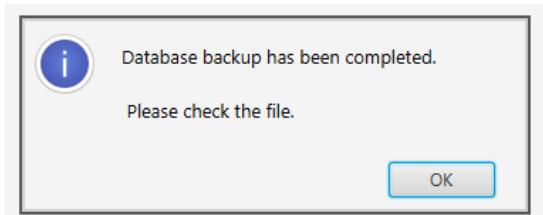
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Upon selecting the option, the location and file name need to be entered, if the action has already been completed once the selection is saved and loaded in to the file selection panel.

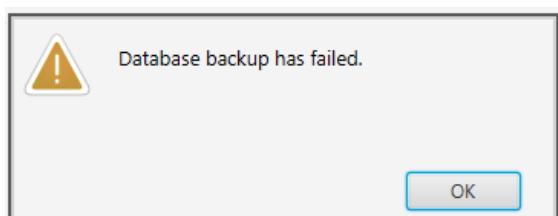
During the backup process a progress indicator is displayed.

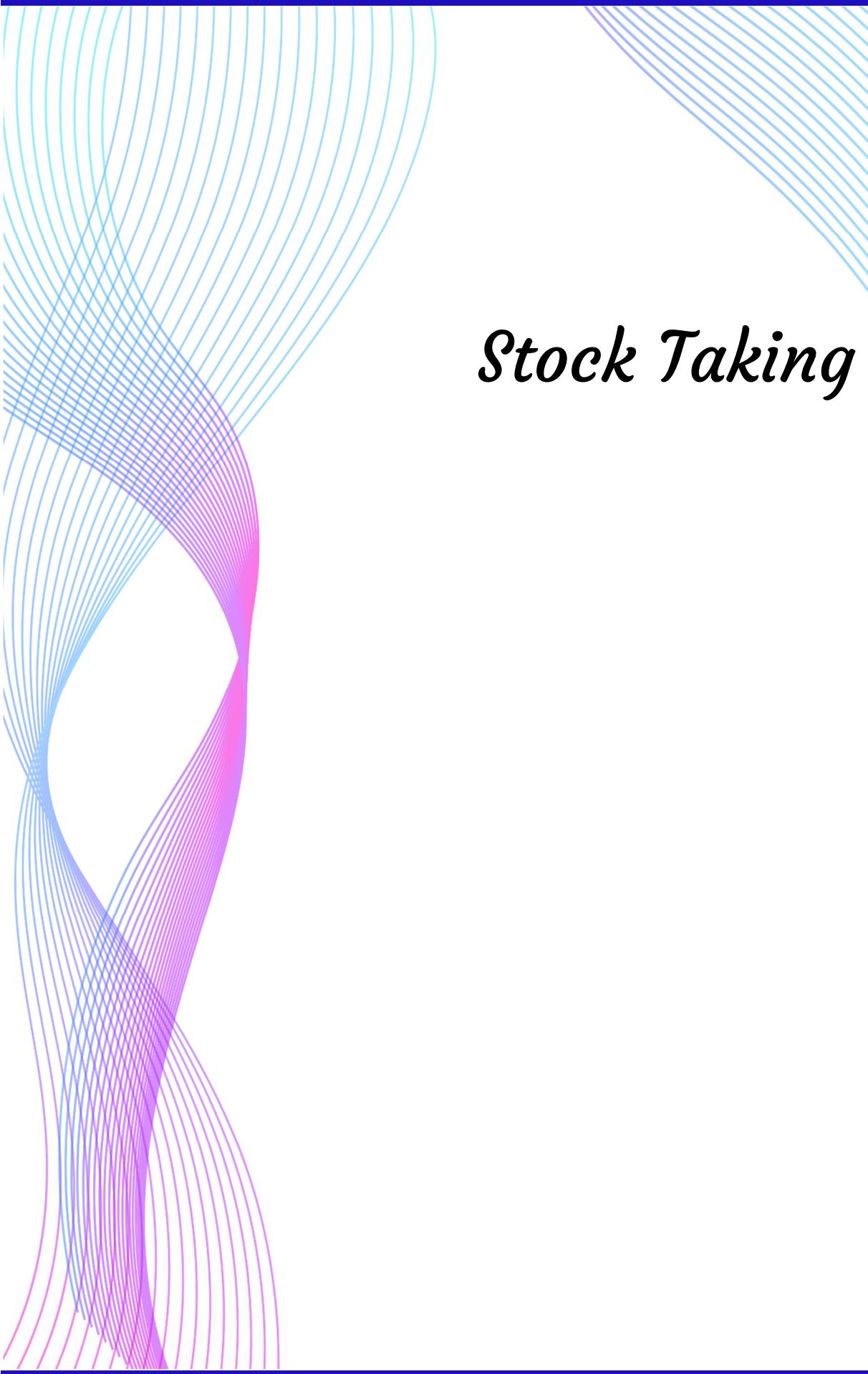


Once completed the is reported back to the user.



In the event of a failure



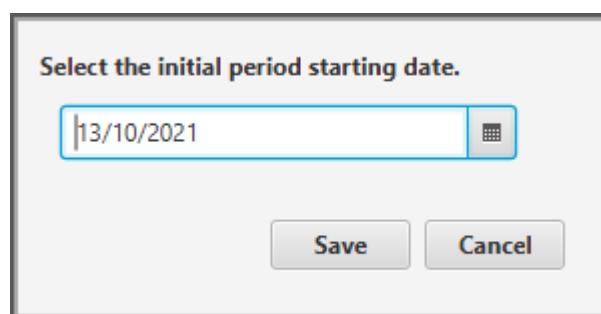
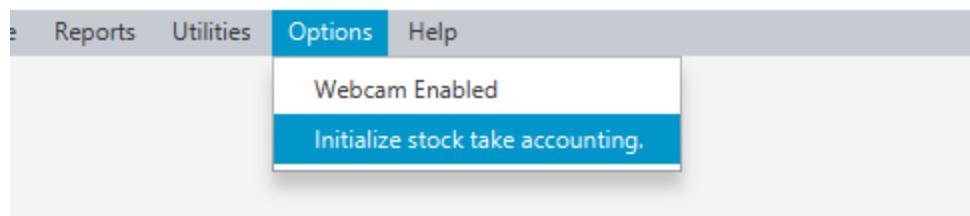


Stock Taking

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Chromis provides the ability to run periodic stock reports. Before this feature is used the system needs to be setup for it by following steps.

1. If any products are to be migrated into the system this should be completed first.
2. Decided when the accounting period is to start from.
3. From the menu select Options – Initialize stock take accounting

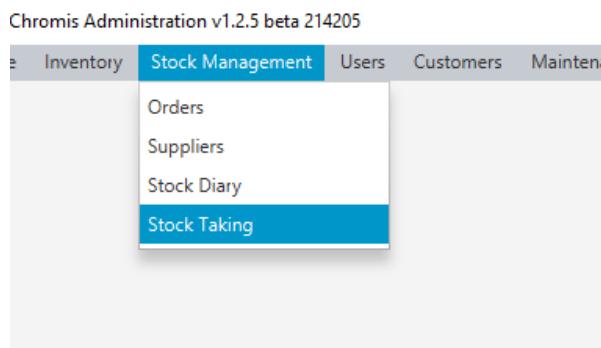


Select the date and click Save.

4. This will zero all stock records ready for you to start.

At this moment it is recommended that your stock take is done after you have finished trading for the day, and any stock movements are entered first.

Once you are ready to do a stock take, in the Administration application, select Stock Taking from the Stock Management menu



Once opened the Stock Take panel is displayed.

This shows the start date for the current period, and all the product that have the manage stock flag enabled in the product set up.

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Period Start Date 01/10/2021

Products :- 3 records

Reference	Barcode	Description	Category	Location	Stock
Apples	Apples	Apples	General Products	Main Store	0.00
spuds	spuds	spuds	General Products	Main Store	0.00
Test	Test	Test	General Products	Main Store	0.00

If the product is available in multiple locations, there is a line for each location.

The products can be filtered by Category and or Location to reduce the displayed list, or refined using the search function.

Any stock counts entered are saved if the panel is exited.

You can view the current stock report at any time using 'Show Period Report'

Zoom :

Page : 1

Printed
13 Oct 2021, 22:57:34

Stock Take Report

Category	Opening	Wastage	Breakage	Trans' In	Trans' Out	Purchases	Returns	Refunds	Deliveries	Stock Holding		Actual Sales	
										Calculated	Physical	Cost	Retail
Fruit & Veg	0.00					71.50				71.50	79.15	0.00	0.00
General Products	0.00									0.00	0.00	0.00	0.00
Totals	0.00	0.00	0.00	0.00	0.00	71.50	0.00	0.00	0.00	71.50	79.15	0.00	0.00

Cost of sales 0.00 Stock Shortage\Overage 7.65 (9.67%)
Sales excluding tax 0.00 Wastage 0%
Sales including tax 0.00 Breakage 0%
Tax 0.00 Approved by _____
Profit 0.00 Date _____
NaN

Page : 1 of 2

Once you have completed the stock count and are happy with it, you need to finalize the accounting period.

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This will Finalize the accounting period once done it cannot be changed.

Ensure that all deliveries, wastage, breakages etc have been completed relating to this period.

Are you sure you wish to continue?

Yes

No

Ensure you have done all of the stock take, before completing this action as it cannot be undone.

You will be presented with the report again so that it can be printed out or saved.

The Stock Take report for any completed Stock Takes is available in the reports section.



title