REAL TIME POINT of SALE

A

“How to use” Document (User Manual)

On

“<Real Time Point of Sale, Web-based admin tool>”

Admin-Tool V5.2, approved

Document V2.1, approved

Mar-2017

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1. Introduction

1.1. Purpose

This document's purpose is to show and explain to the intended audiences how to use the web-based admin tool for the Real Time Point of Sale desktop application.

1.2. Document Conversion

To open this document and be able to read it as it is designed, you will need Adobe reader/Acrobat V7.0 or later versions or even any compatible versions of PDF readers with the mentioned versions in order to avoid any conflict between the designed document and the delivered one. Get back to your consultant for any inquires.

1.3. Intended Audience and reading suggestions

This document is designed for its' intended audiences and limited to reading only with no further editing on it without the permission of the document owner. You may read this document by following the table of content and the document order as it is to acquire the best knowledge and information out of it.

This document is intended for internal support department, internal Development department, internal consultants and the system administrators that will be using the Real Time Point of Sale admin tool.

1.4. Project Scope

This product is an administrative tool provided with the Real Time Point of Sale for better agility and business processes control. It can control all of the functionality for all of the Real Time Point of Sale users and even the authorizations for the users of the admin tool itself.

The admin tool is part of the deliverables of the Real Time Point of Sale solution package and cannot be delivered alone or without a handover from the consultants or the key users to give a brief about the product that this tool is configuring.

1.5. Document Copyrights

1.6. References

This document can be used by its' intended audience as a standalone document, if you are only trying to understand how to use the product. However, our recommendation is that you receive a handover from our consultants or the key users of the Real Time Point of Sale itself so you can be able understand all of the functionality for the tool that is in your hand.

2. Product Description

2.1. System overview

This product is considered to be a database administrative tool. It is a web-based product provided to your company in order to assist you control your end users behavior on the system, to add or decrease the authorities that each user has and also to control the users adding, deleting and updating process.

2.2. System Key Features

You will find the main features for the admin tool below

2.2.1. Organized interface

The side menu for the admin tool allow the user to speed up the process of executing his/her tasks and better agility in the administration and support functions.

2.2.2. Easy access

As a system administrator, you can access the tool from any terminal has an internal connection to the server that the tools is installed on.

2.3. System Hot Keys

There are no special shortcuts provided for the admin tool itself. However, you can control the open page as you are controlling any webpage you open with your browser.

3. Getting started, Using the system

3.1. Start the System

The admin tool is accessible through a URL that is given to you by ECS basis team. For a start we will say that the URL is http://localhost/Real Time Point of Sale-Admin/. Once you open that link, you will be able to see the login page.

3.2. Log in functionality

As an administrator you can follow the below instructions to be able to login to the system and check figure 1.

- Open the Admin tool's URL from section 3.1
- Enter your username and password.
- Click the login button.

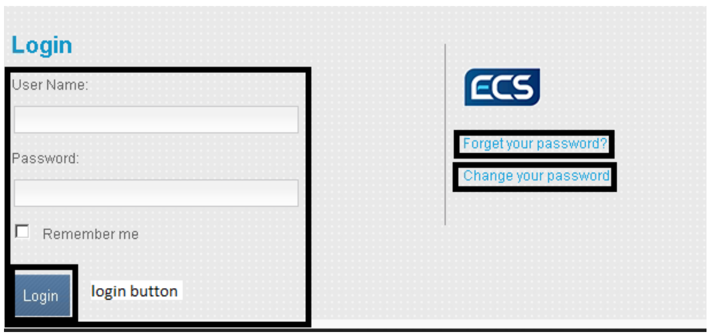

Figure 1: Home page, Login form, login button, Forget password link and change your password link

3.3. Changing Password

You can change your password before logging in by following the below instructions:

- Click on the forget password link. (Figure 1)
- Fill in the form of change your password. (Figure 2)
- Click the submit button and your password is changed if your credentials were right.
- If you want to go back to the login page, click the cancel button.

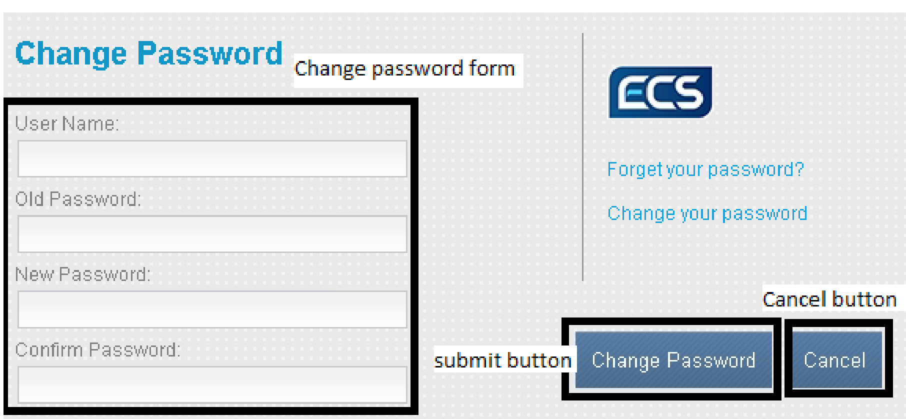

Figure 2: Change password form, Submit button, Cancel button

3.4. Log out functionality

If you want to logout, you can simply click on the logout link beside the user's picture at the top left side of the page. (Figure 3)

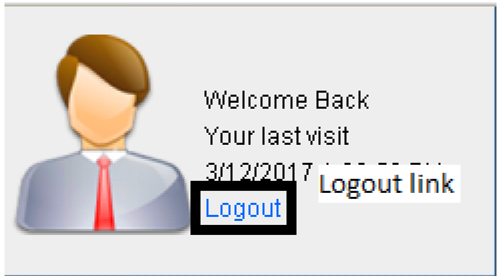

Figure 3: Logout link

3.5. System main Interface, Functional administrator

There are 2 types of users who can use the admin tool, each one of them has different functions and different interface components. You will find the functional administrator's main page as below:

Once this user logs in, he/she will be seeing their main screen as figure 4 and its' contents are:

- Side Navigation menu, it consists of
  - Settings tab to control stores, mac addresses, users and shortcuts (Hotkeys).
  - Customization tab to control the Real Time Point of Sale application setting from SAP server IP that the application is connected with to how many receipts are printed and you can even control some of the allowed functions in the interface itself.
  - Assignments tab to assign the terminals and mac addresses to a specific store and to update on the assignments that were already made.
  - Synchronization tab to synchronize the changes to the intended database store.
  - Store users tab to add, update and delete on any of the delivery users who can add a delivery customer.
  - Admin users tab to control the administrator users who can use that tool.
- Display table and a search bar to display the related information to the selected tab and search for it.

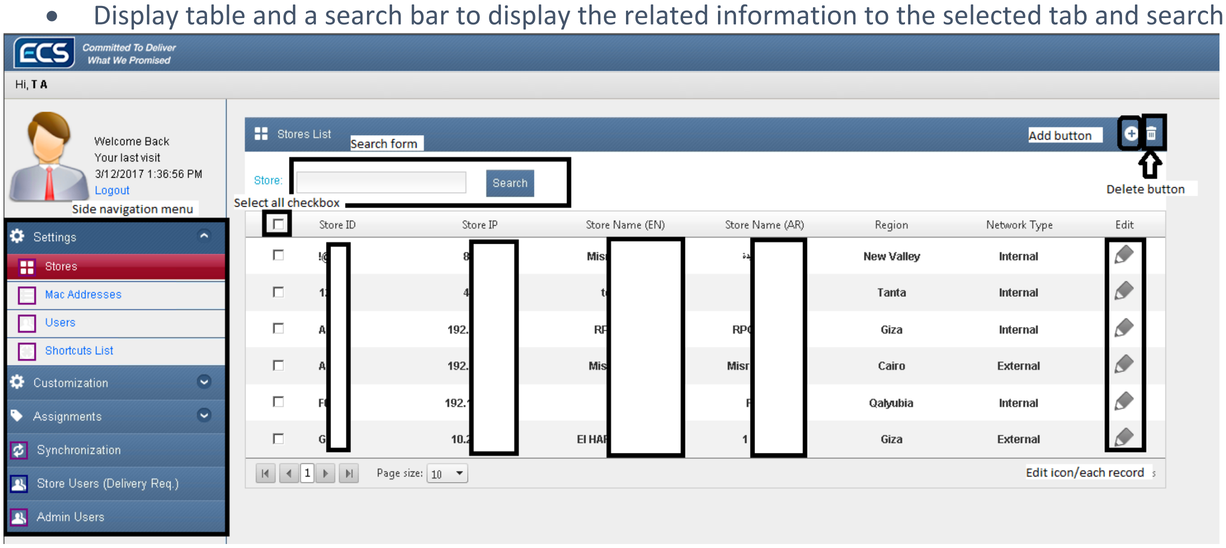

Figure 4: Functional administrator home page, add button, delete button, search form, side navigation menu, select all checkbox and edit icon for each record

3.6. Fully configure a store, functional administrator

Now, your company is expanding and opening a new branch. That branch has 1 server, 5 users (1 Cashier, 2 doctors, 1 supervisor and 1 manager). Your task now is to configure the store setting on the admin tool and create the users credentials. To do that you will need to do the following tasks with the below steps:

3.6.1. Add a store

- From the side navigation menu, select settings, stores.
- Click on the add sign the top right side of the screen.
- Fill in the form from figure 6.
- Click the add button and now the store is added.

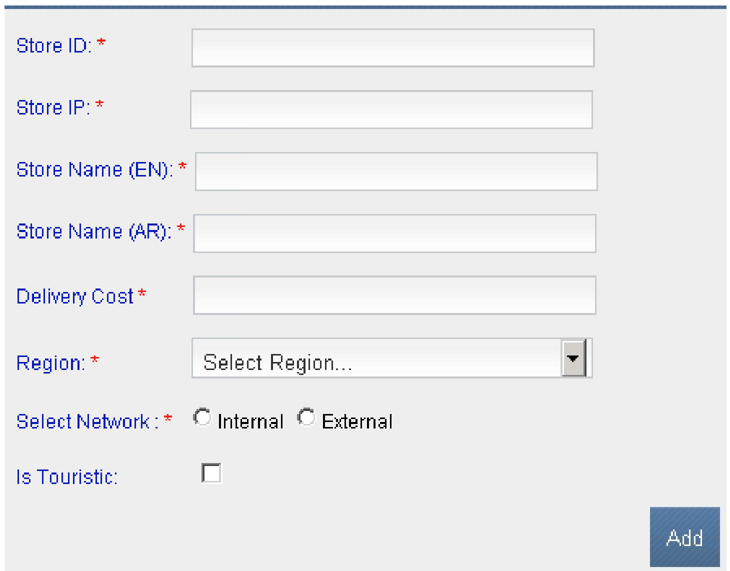

Figure 5: Add a store form

3.6.2. Add terminals

- From the navigation menu, settings, mac addresses.
- Click on the add sign at the top right side of the page.
- Fill the form from figure 7 and click the add button.
- Note that for the server's terminal, we need to mark the checkbox for the "is server" in the form. Each store should have at least 1 server assigned to it.

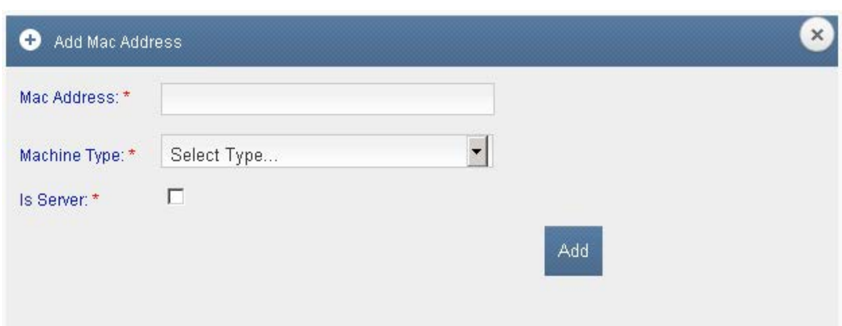

Figure 6: Add terminal form

3.6.3. Add Users

- From the navigation menu, settings, users.
- Click the add sign at the top right side of the screen.
- Fill in the form from figure 8 and click add.
- You will find each user has different authorities, functions and variants. The variants are related to the role of the user and the layout that he/she will be seeing on their terminal once they login to the Real Time Point of Sale. Get back to your consultant to know which variant is assigned to each role.

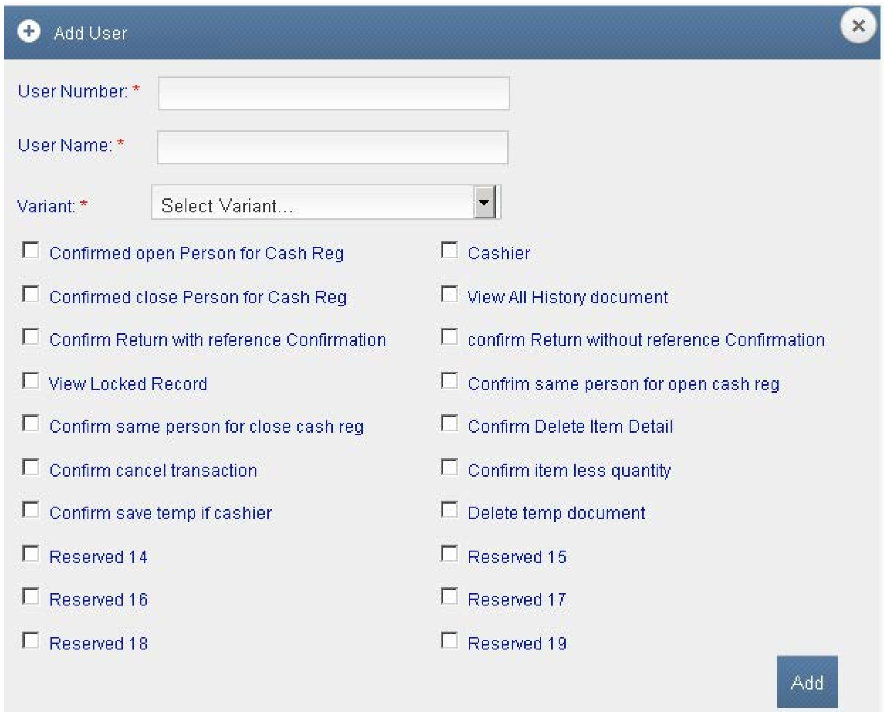

Figure 7: Add user form

3.6.4. Assign the created terminals to the store

- From the navigation menu, assignments, assign mac addresses.
- Click on the add sign at the top right side of the screen.
- Choose the store you created at 3.6.1.
- Choose any of the added mac addresses from 3.6.2.
- Repeat for more 3 times.

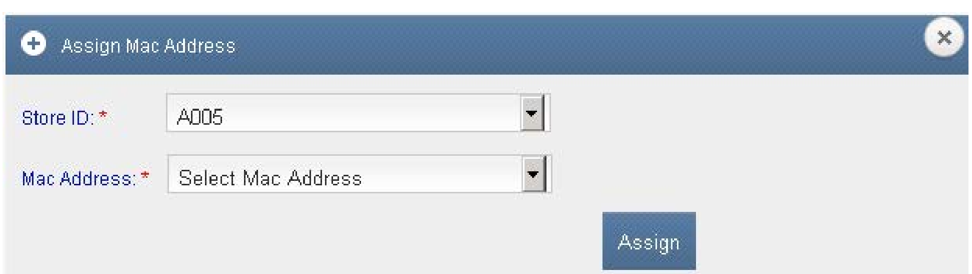

Figure 8: Assign mac address form

3.6.5. Assign the created users to a store

- From the navigation menu, assignments, assign users.
- Click on the add sign at the top right side of the screen.
- Fill in the assignment form for each user created.
- You will find a checkbox unmarked for locking the user, as long as this check box is marked, the user will not be able to login even if he/she used the right credentials.

Figure 9: Assign user form

3.6.6. Synchronize all changes with the store database

- From the navigation menu, synchronization.
- Select the store that you added from 3.6.1 by marking the checkbox beside it and click on the synchronization mark at the top right side of the screen.
- Check all of the change related headline that we made which are store data, Mac address data and users. Once done selecting the changes, click the sync button.

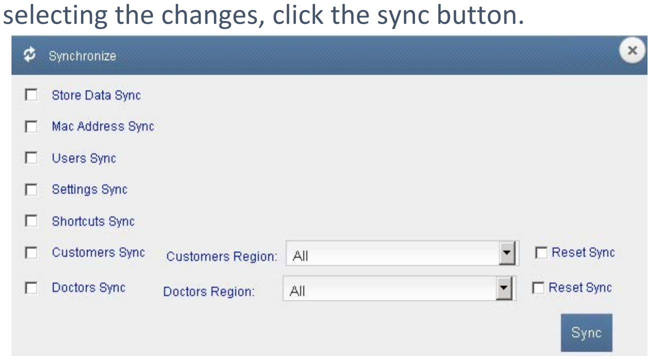

Figure 10: Synchronization form

3.7. Additional functionalities, Functional administrator

The functional administrator will be able to do the following functions as well:

3.7.1. Delete a record

- You can delete any record that is displayed for you by navigating to the record tab. Let us say that you are trying to delete a mac address.
- Navigate to Mac addresses tab from settings.
- Mark the mac address that you want to delete and click the delete button at the top right side of the screen.
- A confirmation message on the delete operation will pop up, click delete for positive confirmation. It might take up to 3 minutes to execute the operation.
- Synchronize the changes as 3.6.6.
- Note that, you cannot delete a store until you delete all of the assigned mac addresses and users to that store.

3.7.2. Shortcuts edit

- You will find all of the functions that can have a shortcut; listed with an edit icon beside each one.
- Once you click the edit icon, you can update the shortcut for that function by editing the form.
- Be aware not to have the same shortcut for more than 1 function.

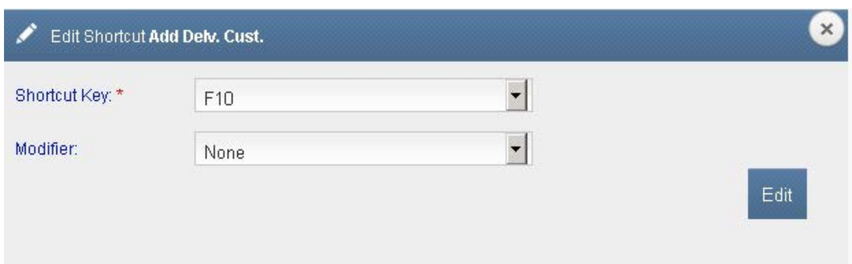

Figure 11: Shortcut form

3.7.3. Customization updates

All of the customization updates are different from a store to another and depends on your business processes. You can get back to your functional consultants for more information about them.

3.7.4. Add admin user

You can add an administrator with any of the 2 types by following the below

- Select admin users from the navigation menu.
- Click on the add sign at the top right side of the screen.
- Fill in the form from figure 15.
- Click add.

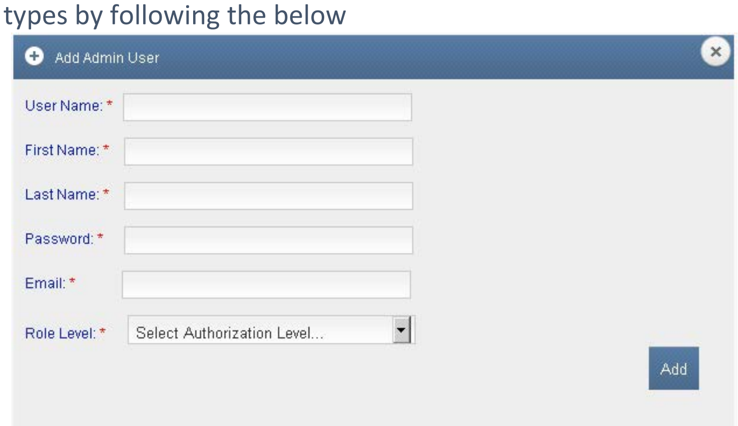

Figure 12: Add admin user form

3.8. System main interface, customers and doctors administrator

Once this user logs in, he/she will be able to see the main screen as figure 11 and it consists of the following:

- Side navigation menu with the following components:
  - Customers' list tab to control all of the customers functions like add, update and delete function.
  - Doctors' list tab with the same functions as the customers' list.
  - Synchronization tab to synchronize any changes made by that user to the intended store.
  - Reports tab to extract and calculate some of the stores' performance functions like calculating the delivery invoices count.
  - Upload data tab to upload an excel sheet with all of the customers' data.
- Search bar to search for a specific record.
- Display table to show the related information to the selected tab.

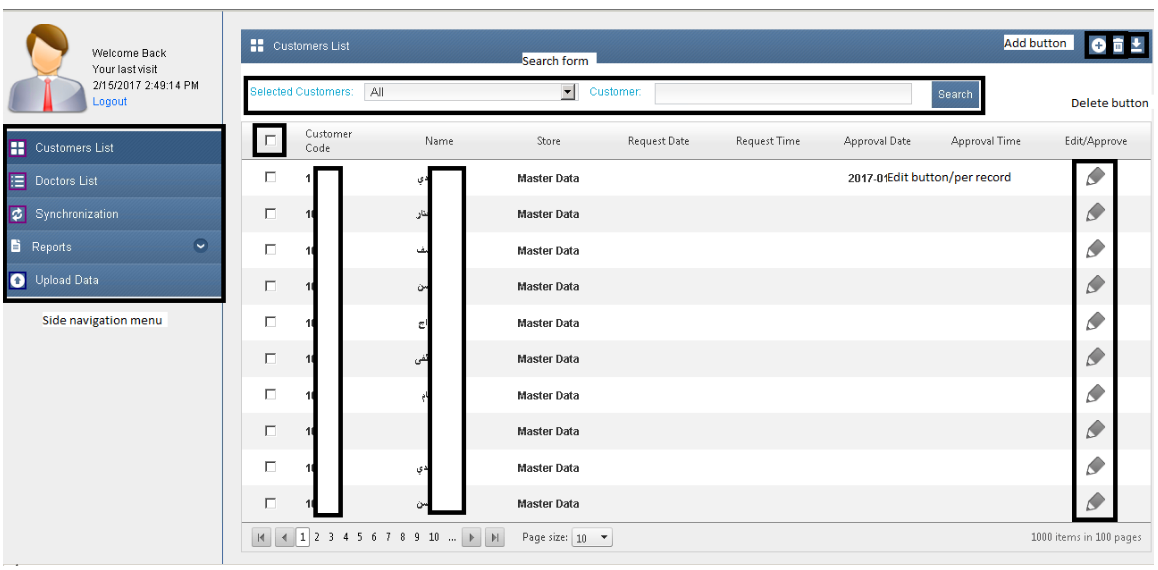

Figure 13: Customers & Doctors administrator's home page, side navigation menu, search form, delete button and export button

3.9. Add customers, doctors and synchronize database, Customers and doctors administrator

As a customer and doctors administrator, you task is to add 1 customer, 1 doctor, download separate excel files for all of the customers info and doctors info and synchronize all the changes that you made. To do that task you will need to login and to follow the below tasks with the below steps.

3.9.1. Add customers and export the sheet

- From the navigation menu, customers list.
- Click on the add sign at the top right side of the screen.
- Fill in the add customer form from figure 12 and click add.
- Click on the export button at the top right side of the screen and the sheet will be ready for download within 10 minutes or less.

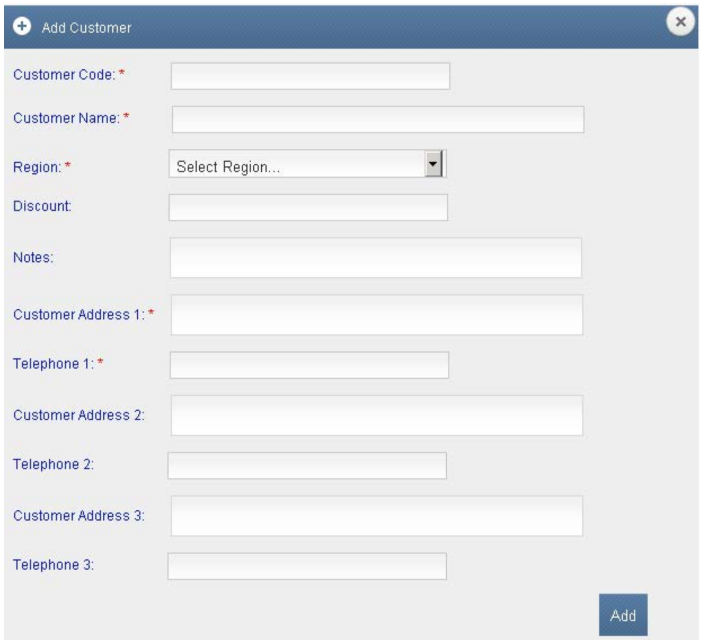

Figure 14: Add customer form

3.9.2. Add doctors and export the sheet

- From the navigation menu, doctors list.
- Click on the add sign at the top right side of the page.
- Fill in the form from figure 13 and click add.
- Click on the export button at the top right side of the screen and the sheet will be ready for download within 10 minutes or less.

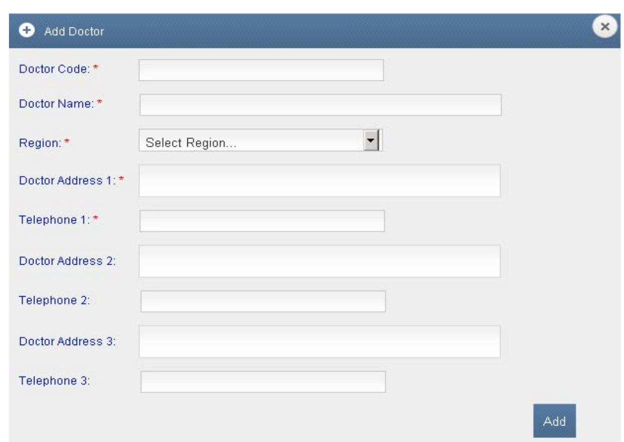

Figure 15: Add doctor form

3.9.3. Synchronize changes

- Same synchronization steps from 3.6.6.

3.10. Additional functionalities, customers and doctors administrator

3.10.1. Reports extraction

- Navigate to the reports tab from the navigation menu.
- Select the report type under the reports.
- Select the store.
- Click on the calculate tab at the top right side of the screen.
- Wait for a couple of minutes and either the report is ready for downloading or written in the display table.

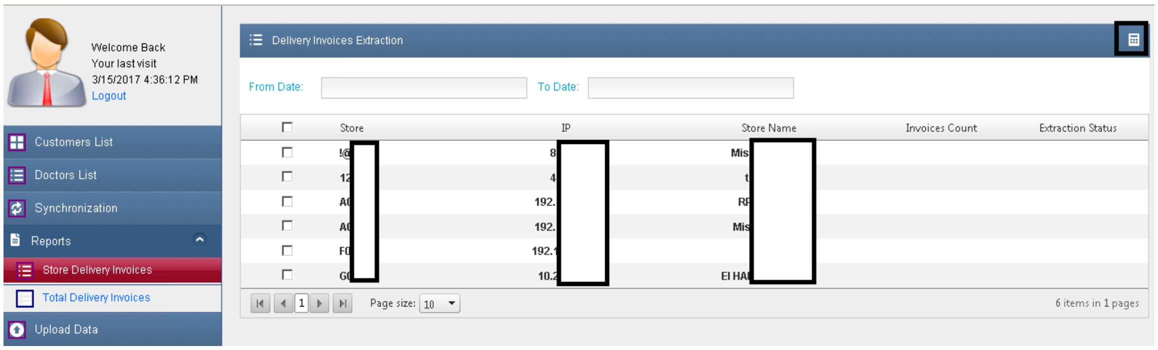

Figure 16: Reports extraction and calculations

3.10.2. Upload Data

- Navigate to upload data from the navigation menu and you will be able to see your screen as figure 17.
- Make sure to formulate the excel file to exact setup for the tables in the database. Get back to the consultants for file format and arrangements.
- Select the targeted data as delivery customers.
- Click upload.
- Wait for a couple of minutes and the uploading is done.
- If there are any mistakes with any record, you will find them not added to the Real Time Point of Sale and has a check mark icon instead of edit icon so you can update the mistakes.
- Do not forget to synchronize the changes to the database.

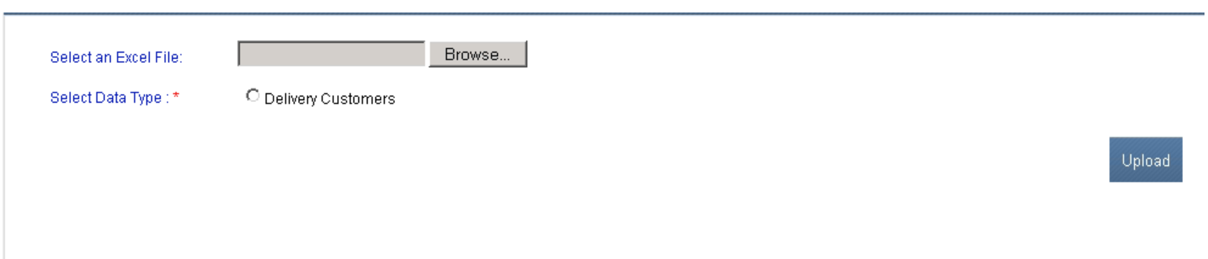

Figure 17: file upload form