# REAL TIME POINT of SALE

A

“How to use” Document (User Manual)

On

## “<REAL TIME POINT OF SALE>”

Product V5.1.4, approved

Document V2.1, approved

Mar-2017

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# 1. Introduction

## 1.1. Purpose

The purpose of this document to provide all of the related information for the REAL TIME POINT OF SALE application to its' intended audiences.

## 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 key users.

## 1.4. Project Scope

REAL TIME POINT OF SALE stands for Real-time Point of Sales system. The process of cashing out the items for the customers of your retails business has never been that easy as it is with the REAL TIME POINT OF SALE. Just scan the item, submit and then pay with various choices of payment methods that is customizable to best suit for your business.

REAL TIME POINT OF SALE provides businesses with a comprehensive and full integration with SAP ERP system that simplifies the front and back office operations. You can link the point of sale terminals to the back end system such as accounting, inventory and provide real-time analysis for management to accurately measure the performance of their business, this enables you to have a complete control over sales and inventory while providing staff and customers a great user experience.

## 1.5. Document Copyrights

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## 1.6. References

This document can be used solo if you are an end user in a business that has an internal 1st line of support. If that is not the case, you will need to read the troubleshooting document in order for you to be able to tackle any issue that might happen and follow the mentioned procedures in that document.

# 2. Product Description

## 2.1. System overview

This product is fully integrated with SAP ERP&CRM systems and servers. All of the features and functions are customizable based on the customer's requirements and requests. It consists of REAL TIME POINT OF SALE desktop application, 2 admin tools to control the functionality and the user interface for each user, inbound outbound services, local database and a secured and encrypted connection with the ERP servers.

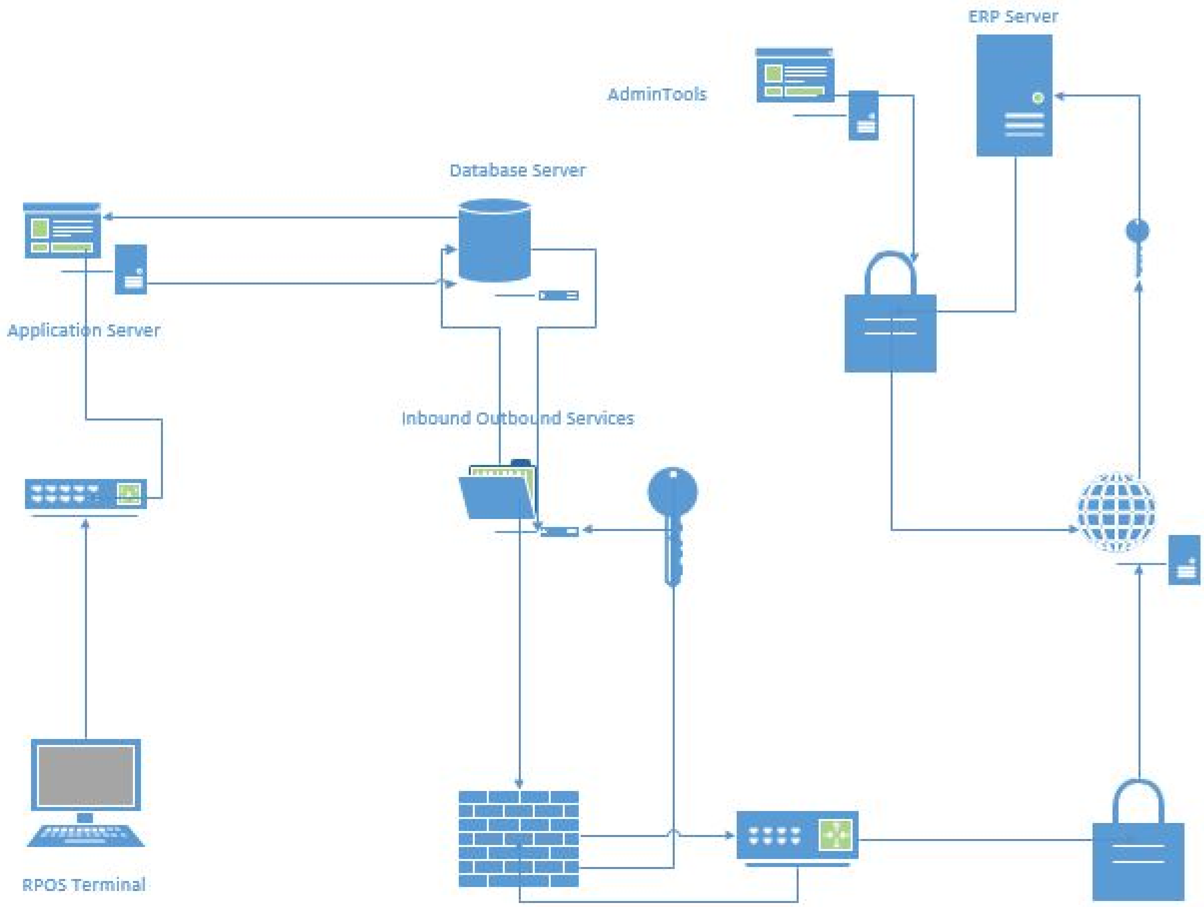


*Figure 1: REAL TIME POINT OF SALE-Architecture Diagram*

## 2.2. System Key Features

The REAL TIME POINT OF SALE has some unique features that defines it from the others and they are as the following:

### 2.2.1. Offline Capability

The situation here is a chain of stores they are all connected to the SAP ERP servers through the internet connection from a service provider. In case the internet was disconnected, the REAL TIME POINT OF SALE will store all of the transactions offline and once the internet service is working again, all of the operations will be uploaded to the ERP servers.

### 2.2.2. SAP Integration

The REAL TIME POINT OF SALE is fully integrated with SAP ERP and CRM systems as it is SAP certified third party application. To help your organization and your decision makers control the stores chain, sales and after market analysis for better performance and more profit.

### 2.2.3. Flexible payment options

REAL TIME POINT OF SALE supports multiple payment methods (Cash, Visa, loyalty Card and Voucher) which streamline the process of transaction; with our solution you can process multiple payment methods for one sale.

### 2.2.4. Printing customization

Easy to customize your receipt template to be displayed the way you want and you can automate receipt printing upon saving the document.

### 2.2.5. Customizable Interface

You can easily customize your application interface according to your preferences to give you the flexibility to change/ remove data fields, toolbar icons, screens, menu options. So you can have only the transaction fields that are frequently used.

### 2.2.6. Enhanced return management

The solution offers a very easy tool to manage the returned items. It has two types, either the return can be with an invoice reference number and with predefined maximum days limit or without a reference number.

## 2.3. System Hot Keys

The system hot keys are customizable based on the business operations request. You can get back to our consultants or your system administrators to provide you with the table of the hot keys.

# 3. Getting started, using the system

Note that this document has all of the functions that is available in the REAL TIME POINT OF SALE. Based on your business needs, you might not find all of them available for you.

## 3.1. Master functions

Here you will find the functions that is available for all of the users and they all can execute them.

### 3.1.1. Start the System

Once you start the machine and login to the operating system, you will be able to see your desktop with various icons on it. Double click on the icon with the name “INTERNAL REAL TIME POINT OF SALE – Shortcut” as figure 2. After that the application will be opened on login screen as figure 3.

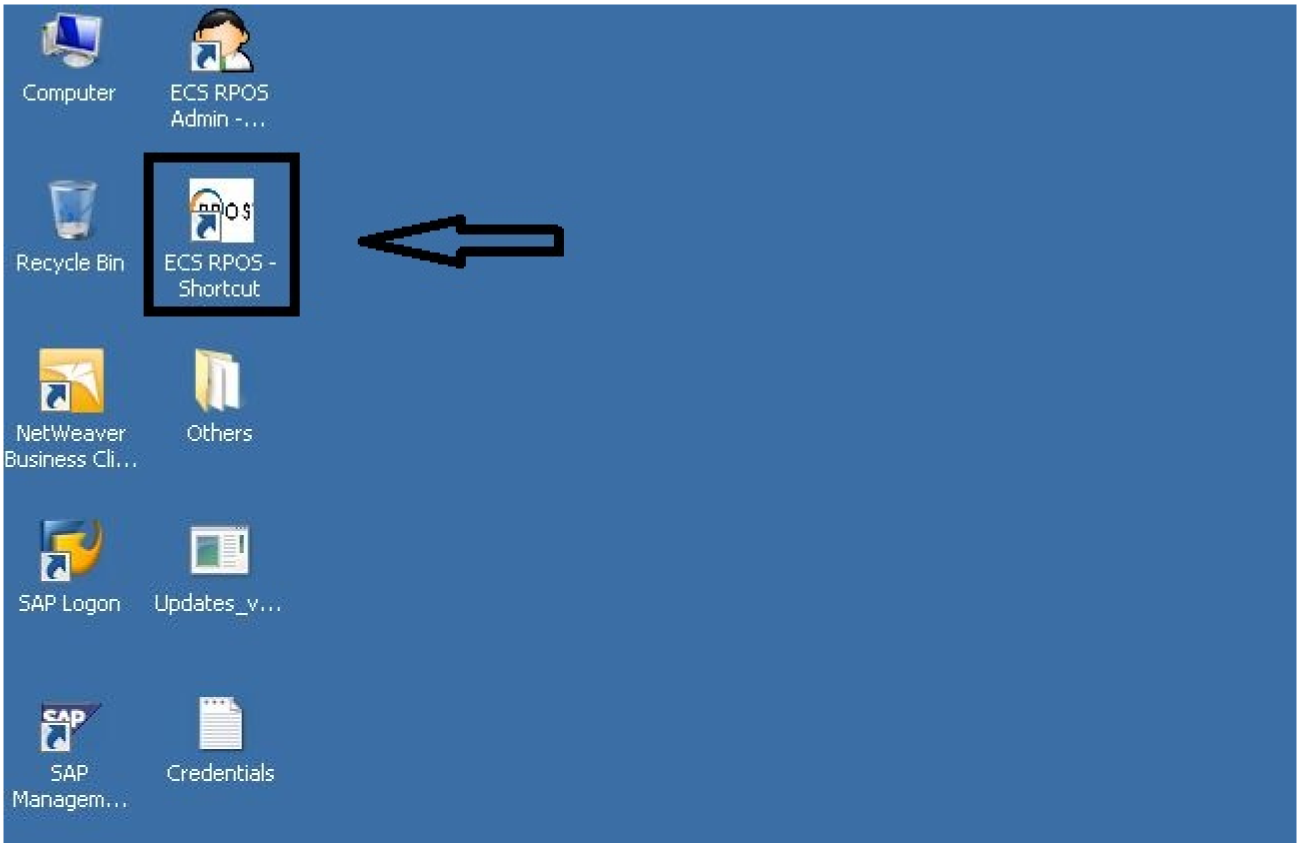


*Figure 2: Desktop, REAL TIME POINT OF SALE start icon*

### 3.1.2. Log in functionality

After running the application, you will have the login screen open and ready for your input. Enter your user name and password and press enter or click on the submit button as figure 3 & 4. If you are logging in for the first time, you will be requested to change your password. Check 3.3 for instructions.

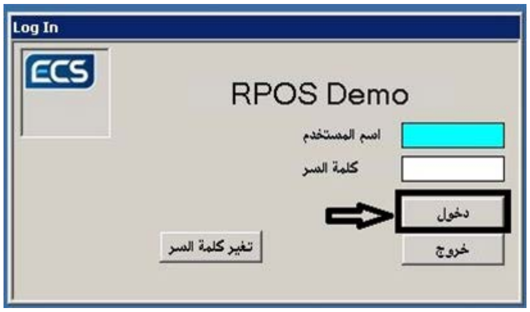


Figure 3: Submit button - Login button

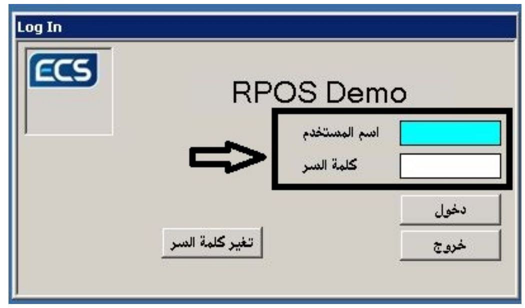


Figure 4: Main screen - Login Form

### 3.1.3. Changing Password

You can change your password from the main screen "Figure 3&4" by writing your current username and password in their dedicated boxes and click change password button. Then you will see 2 new boxes to write your new password and to confirm them. Once you are done, click the confirmation button and now your password has changed. Check figure 5 and 6.

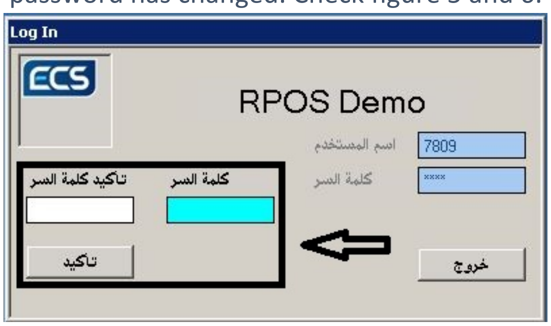


Figure 5: New password boxes and confirmation button


Figure 6: Change Password Button

### 3.1.4. Log out functionality

The logout function can be executed with the process for all of the users except for the cashier as he/she will have to close the cash register first before logging out. If you are a Pharmacist, supervisor or a manager you can just click logout button and then confirm the operation on the pop-out confirmation message and that is it. "Figure 7, 8". If you are a cashier, you will need to close the cash register. Refer to section 3.2.3


Figure 7: Confirmation pop-up for logout function


Figure 8: Logout button

## 3.1.5. Search for a temporary document/Reprint a final document

Once you login with your credentials and your main screen is open, you are able to search for a temporary document that was already submitted by the authorized users for such an operation. You can follow the below steps and see figure 20 to search and retrieve a temporary document information:

- Click on the document button at the top right side of the main screen or press Ctrl+R.
- A new window pops up, (Search for a temporary document window).
- You can choose from the following search criteria:
    - Date of submission, Start date to end date, Format (YYYYMMDD). If the month or the day are single integer like 1, 2 or 3, they must be entered in this format 01, 02, 03…etc.
    - Time of submission, Start time to end time, Format (24 Hours format, HHMMSS). If there are no minutes nor seconds they should be entered as 00. Ex: 150001. That mean 1 second after 3 PM.
    - Document type.
    - Operation type.
    - Document number.
    - Reference number (Invoice number)
    - Cash register number.
    - Item group number.
    - Customer reference.
    - Insurance reference.
    - Customer’s phone number.
    - Credit card machine number.
    - Machine queue reference.
    - Delivery document reference.
    - Cashier name and seller name.
- All of the search criteria inputs are very sensitive to any mistakes as they retrieve what exactly matches the inputs. Once you finish adjusting the search criteria inputs, click the search button or press enter.
- Select your targeted document, press enter or double click on it if it’s a temporary document and you want to retrieve its’ information to the main screen to cash it out or update it.
- On the search document window, you can reprint the document or save a PDF copy of the printed receipt to the machine.
- To close the search window, press the ESC button or click on the exit button.

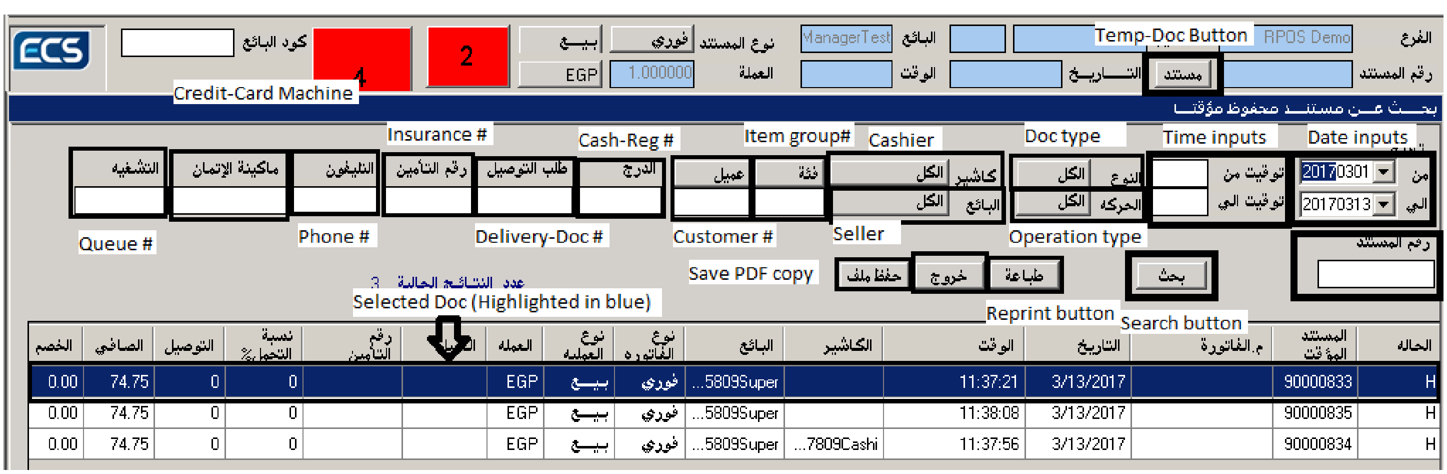


*Figure 9: Document search entries*

## 3.2. Cashier's functionalities

### 3.2.1. Cashier's main screen

Each user type has his own screen arrangements and preferences. Those customizations are made by the system administrators based on the business processes and requirements. You will see the different screens for each user that will suit him/her the best, matching the business requirements of course. See figure 10.

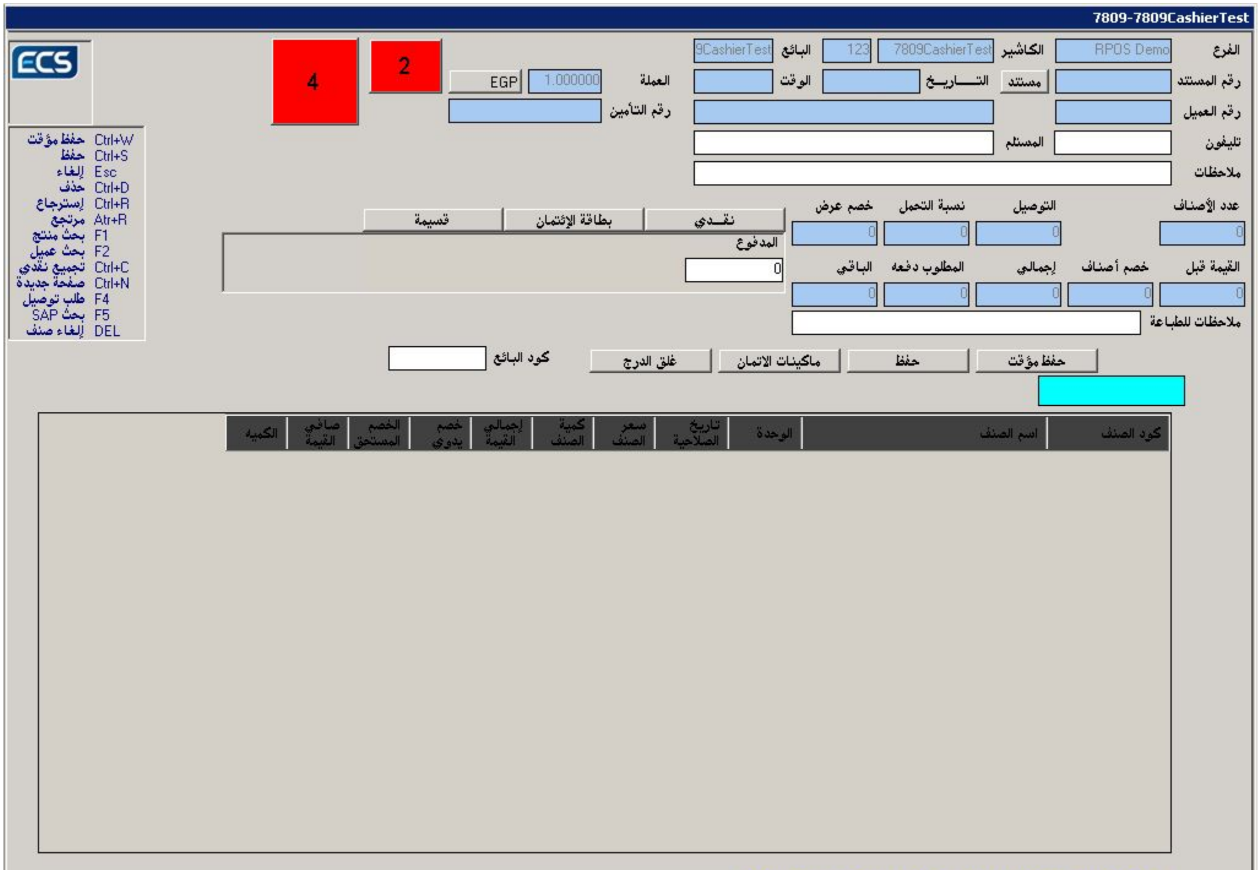


*Figure 10: Cashier's Main Screen*

### 3.2.2. Main function, (Submit an invoice)

In order to submit an invoice as a final document and cash it out for the customer or the patient, the temporary document for that invoice should be submitted by the pharmacist first. As a cashier user, you can retrieve temporary documents' information to the main screen. Refer to section 3.1.5 for detailed steps on how to retrieve the document's info to the main screen and follow the following steps for each payment method and check figure 11 and 12 below:

- Cash Payment
  - Choose cash payment from the payment methods.
  - Enter the paid value from the patient or the customer in the paid input cell. (Only numbers, 7 digits maximum, one dot mark is allowed.) Before saving the amount of paid should be equal to bigger than the required payment value.
  - The program will calculate the change automatically. However, you can easily press Ctrl+C to let the application enter the exact required payment value and insert it to the paid input cell.
- Credit Card Payment
  - Choose credit card from the payment methods.
  - Press Ctrl+C or enter the value manually in the paid amount. However, it has to be equal to the required payment value.
  - Enter the last 4 digits of the credit card number.
  - Enter the expiration date of the credit card in that form YYMM. If the expiration date was 201709 so the input will be 1709.
  - Enter the credit card machine number. If you do not know it, refer to section 0.
- Voucher Payment
  - Enter the voucher type.
  - Number of vouchers as each voucher has amount of money paid with it.
  - No change provided for the voucher so in case the patient bought an item for 12 pounds and the voucher covers up to 100 pounds, he cannot get any change or take the voucher again.
- For the covered amount by any of the previous methods, you can mix between any 2 of them or even the 3 of them. However, once the document is being submitted the total of paid amount cannot be less than required payment.
- Click on the save button or press Ctrl+S once done.

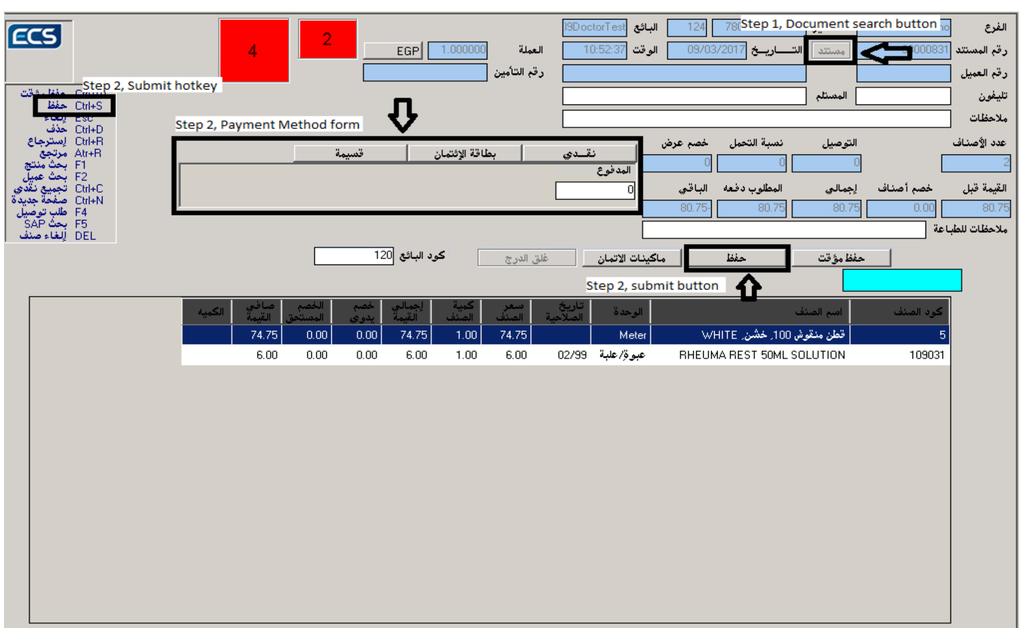


*Figure 11: Cashier's main function*

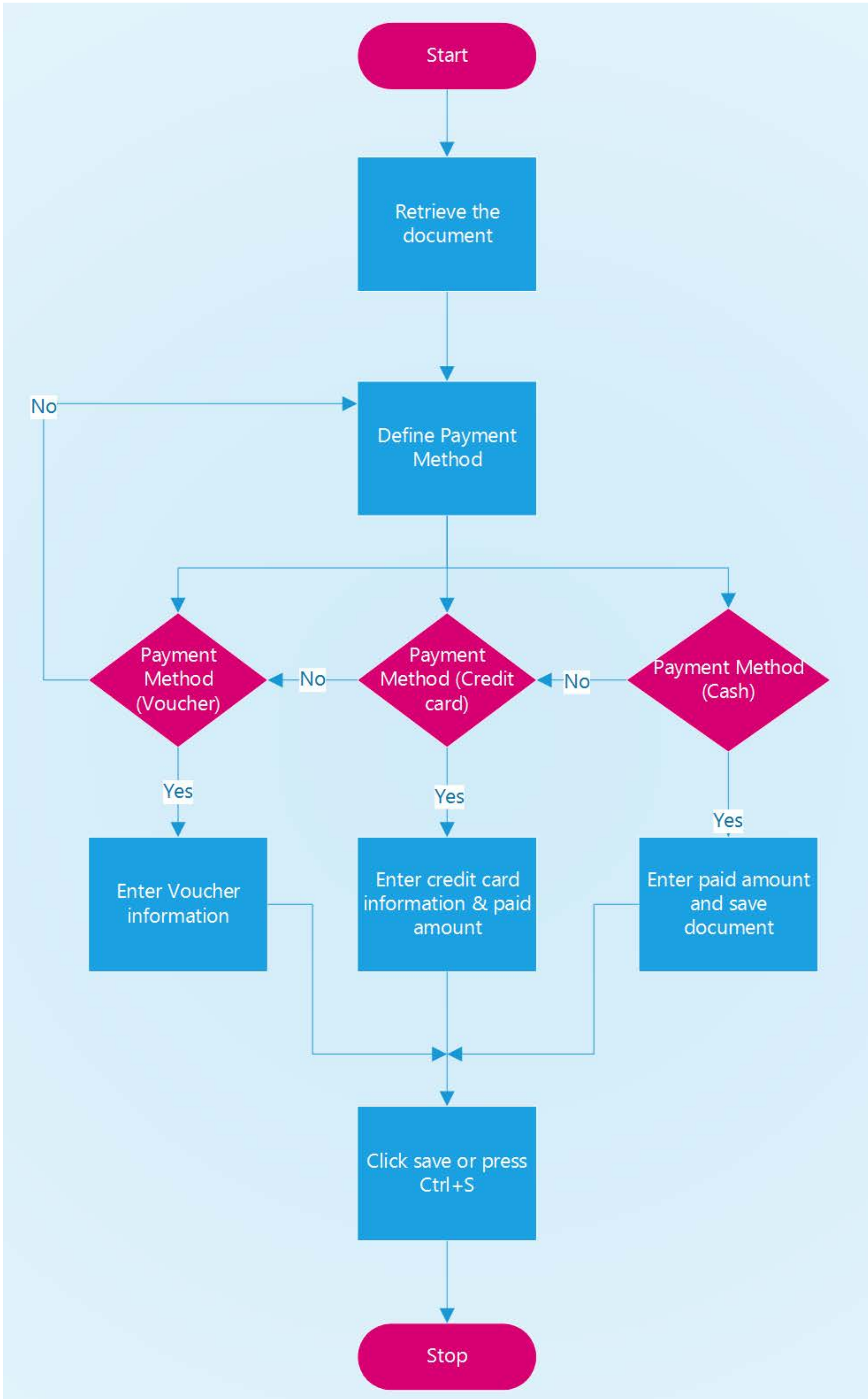


*Figure 12: Submit an invoice, flowchart*

### 3.2.3. Open/Close cash register, functionality

The cashier user has to know his/her username and password and login with them. Once that is available follow these instructions and check figures 13, 14 to be able to open a cash register:

- Enter the exact values that you received the register with, even if decimal values like 0.25 or 0.50. Only numbers and the dot mark is allowed in that form.
- Press enter or click the accept button.
- An authorization form will appear requesting an authorized credentials for that operation. (Get back to your consultant or system administrator to know if you are authorized for the confirmation process or not.)
- After entering the credentials, click the submit button or press enter.
- If you want to close any of the authorization form or the cash register entries form, you can either press ESC or click on the close button at the bottom left side of both windows.

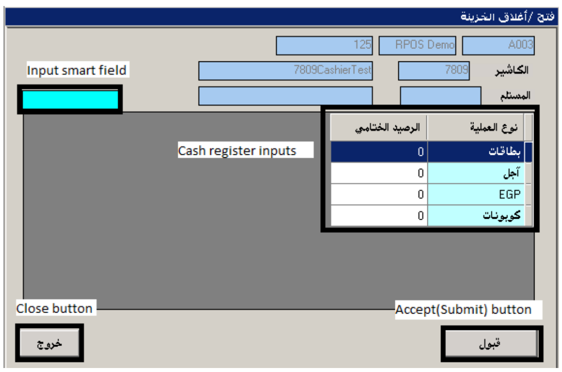


*Figure 13: Cash register entries, Submit button, exit button*

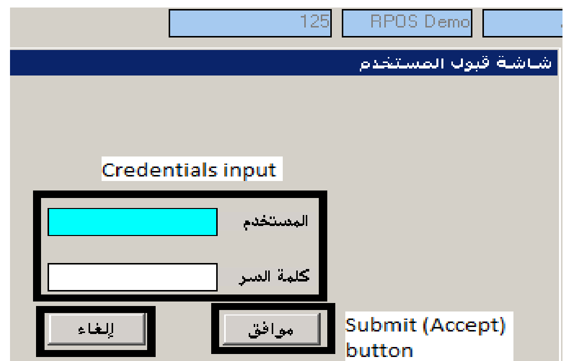


*Figure 14: Authorization form*

### 3.2.4. Credit Card Machine Ref# and Queue # adding

The business process for that function is explained in details by the consultants. The credit card machines or the Cashless ATMs have a reference number also a queue number for usage per shift. You can follow these steps after logging in, once your day at the branch starts:

- Click on the Credit machines button in the middle of the screen. (Figure 15)
- Check to see if the machine reference is written in the table or not. If it is not mentioned add it by yourself to the table and add the queue number as well. (Figure 16)
- If you clicked the Credit machines button by mistake you can close the machines screen by clicking the exit button. (Figure 16)

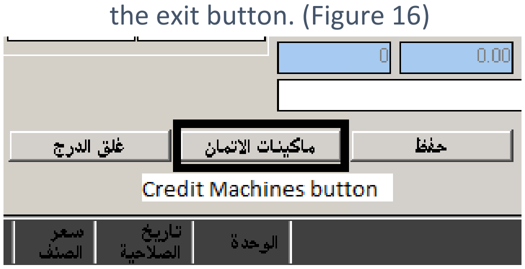


*Figure 15: Credit machines button*

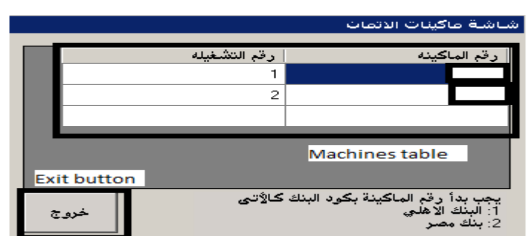


*Figure 16: Credit machines table, exit button*

## 3.3. Pharmacist functionalities

### 3.3.1. Pharmacist's main screen

The below figure shows the main screen for the pharmacist that he/she will be seeing once they login.

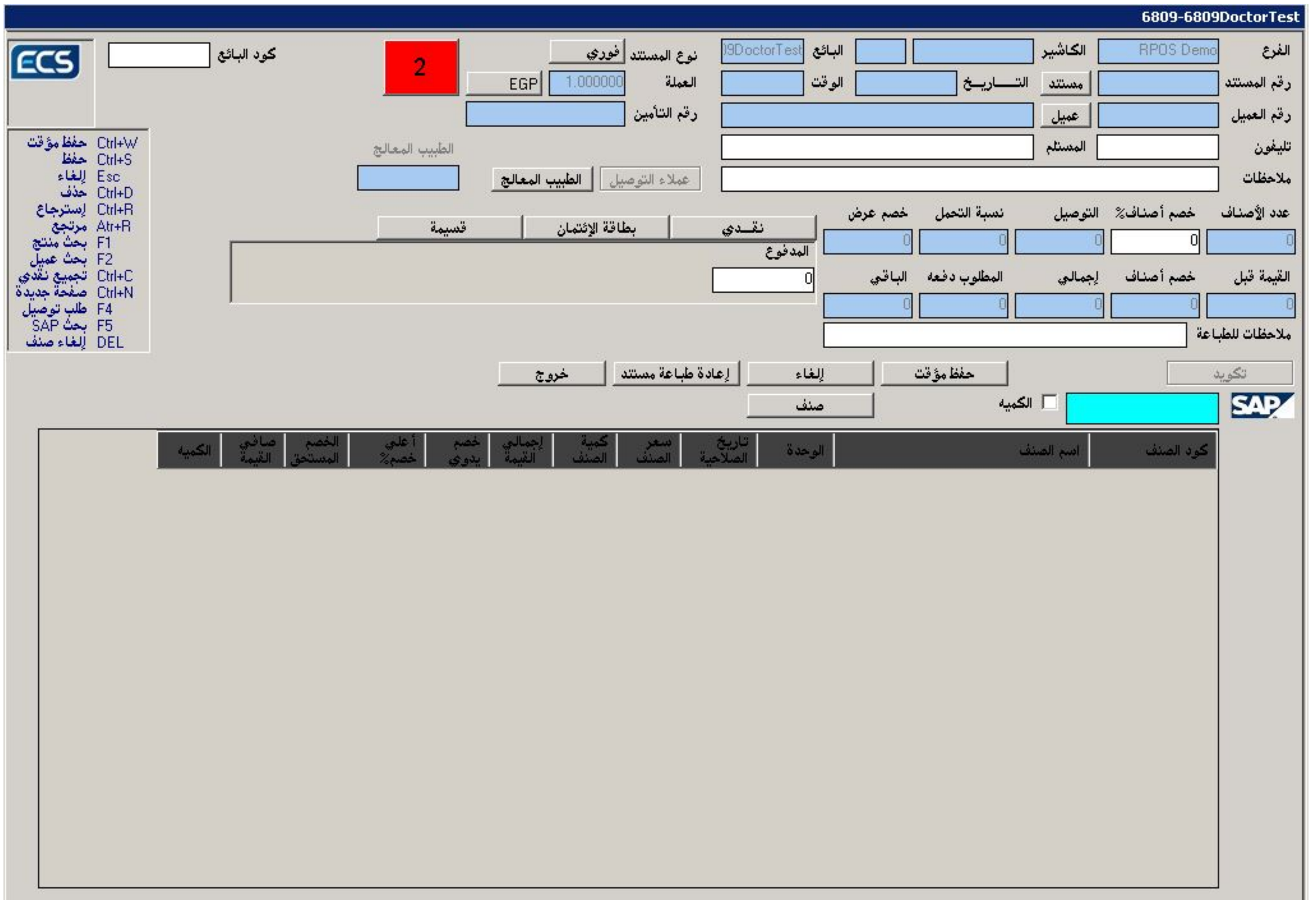


*Figure 17: Pharmacist's main screen*

### 3.3.2. Main function, (Save a temporary document)

The main function for the pharmacist is submit a temporary invoice “Figure 13” in order for the cashier personnel to be able to cash it out for the patient. Once you login as a pharmacist, change the document type to best suit for your case as one of the following (**Immediate** documents, **Delivery** documents, **Insurance** documents and **due-payment** documents) and follow the steps for each and note that there are some steps mentioned at first that will be executed with any type of documents you choose:

- Choose a document type from the top middle part of the screen. (immediate, Delivery, Insurance, due-payment)
- Scan the item that you want to add to the invoice or add it manually by searching or typing the barcode in the smart box. For the manual search function refer back to section 0**.**
- Enter the expiration date for each item if applicable. (Only numbers, MM/YY) If the expiration date is March, 2017, so the input will be 03/17. You need to be aware that if the item expires in the same month of issuance for the invoice, you will not be able to submit it as it is a protocol violation for selling an expired product.
- Enter the seller code. (Get back to you consultant or system administrator for that code.)
- Press Ctrl+W as a hot key, or click on the temporary save button to execute the operation and save the document temporarily. You can also enter any printing notes if you want.
- If your document type is **immediate documents,** it does not require any more inputs or steps.
- If your document type is **delivery documents,** you will enter the phone number, receiver’s name and address.
- **Insurance and Due payment** documents will require from you to enter **endurance ratio** and choose a customer by searching for it. Refer back to section Error! Reference source not found. for steps on doing that. You will have to insert the insurance reference in the insurance documents. (Copy the information from the insurance card as it is.)

- Press Ctrl+W as a hot key or click the temporary save button.

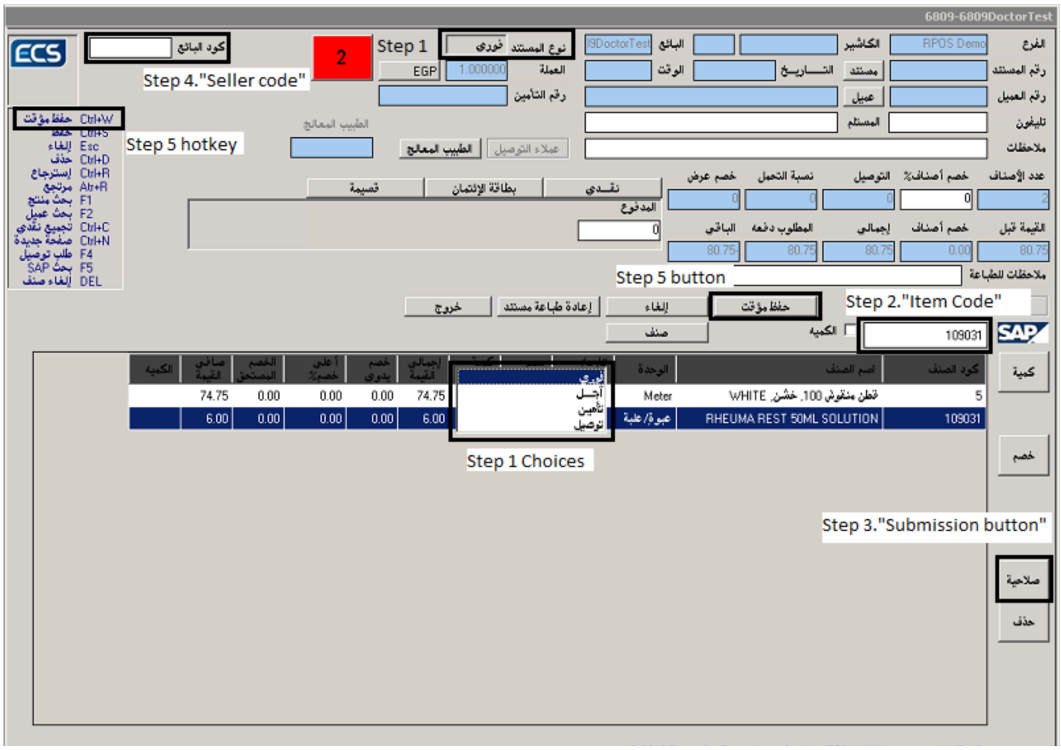


*Figure 18: Save a temporary invoice*

 

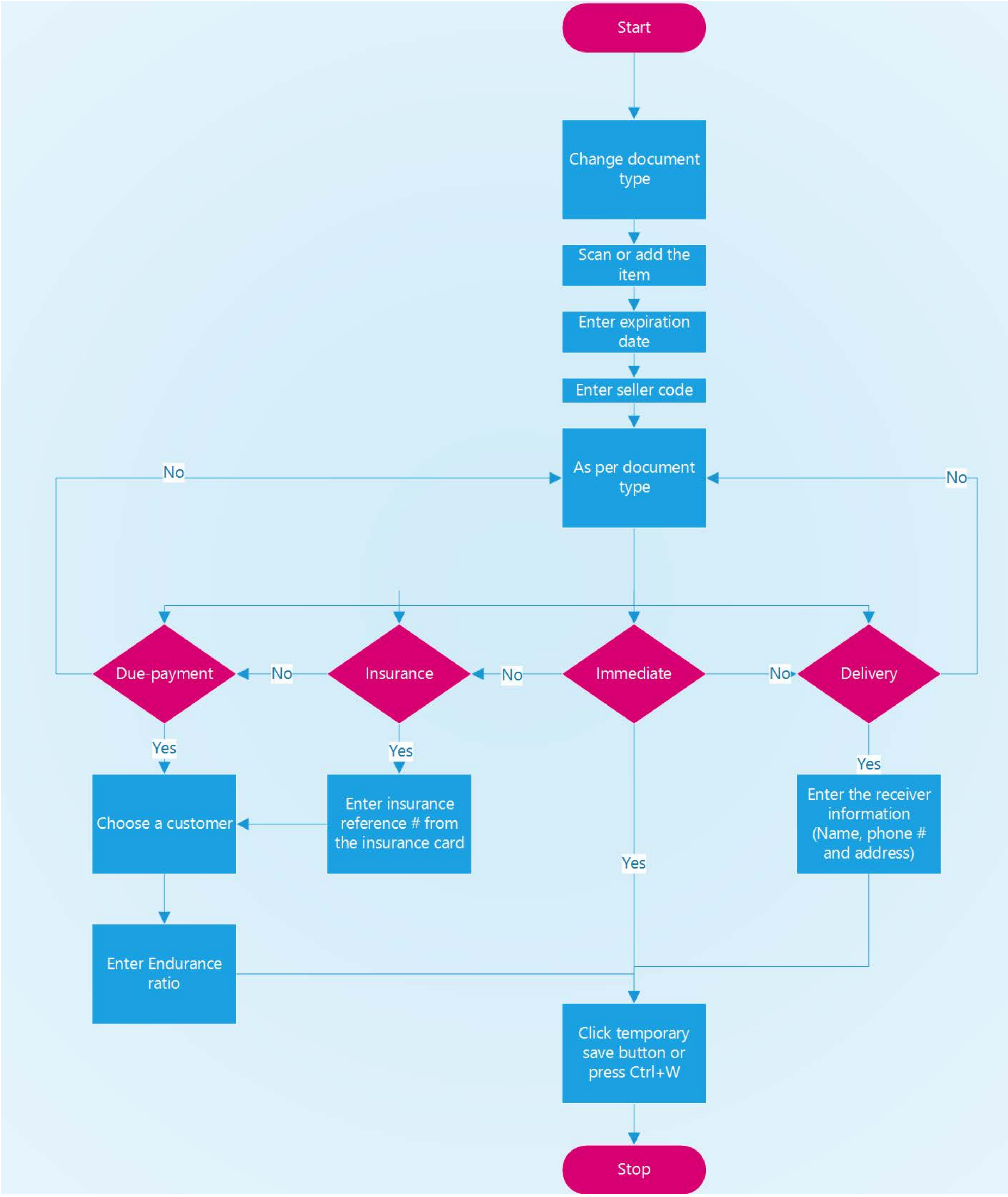


*Figure 19: Save temp document, Flowchart*

### 3.3.3. Search for an Item, functionality

As a doctor or pharmacist, you can add items to an invoice by scanning them through the QR code scanner, entering the item code manually in the small cell then click enter to retrieve all of the item info to the main screen so you can see all of its' information or by searching for them through the search for an item function. You can use that function by following these steps:

- Click the item button.
- The search for item window will pop up. If you click the search button or press enter, the function will retrieve the first 100 items available in your branch.
- You can customize your search by any of the following criteria items:
  - Name (Not case sensitive. However, it retrieves what is exactly equal to you inputs) If the stored item is named SUTRIM 10/TAB and your search input is sutrim, the function will retrieve zero records.
  - Item's group reference #.
  - Effective material if applicable.
  - Item's code.
  - Price range. (Start price and end maximum price)
- You can also click on the items amount button to retrieve the amount of the selected item or for all items.
- All of the criteria inputs must be as they are stored in the database or the search retrieval will be zero records.

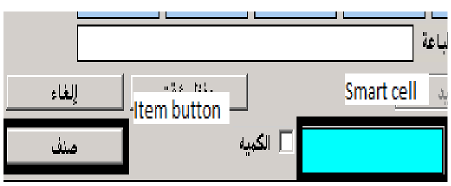


*Figure 20: Item button and the smart cell*

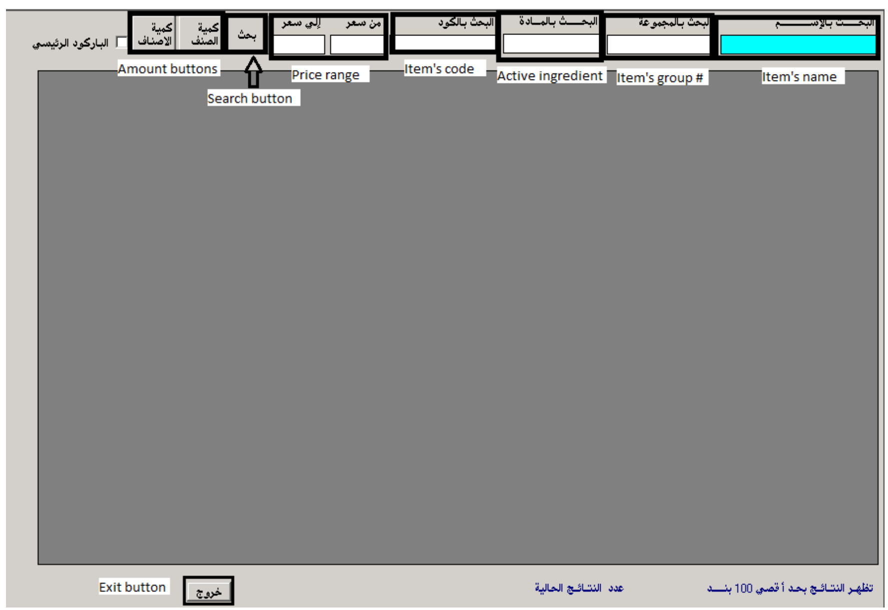


*Figure 21: Item search criteria inputs, search button, amount buttons and exit button*

### 3.3.4. Search for a customer, functionality

Some document types has a unique mandatory inputs like the insurance document type or the due payment document they has the customer reference number and customer name as a mandatory input. You also can not enter them manually, you have to search for them and select them by double clicking the customer's record or pressing enter after marking it. You can follow these steps to search for a customer:

- Click the customer button at the top of the screen or press the F2 button.
- For each document type there are specific customers. For example, the stored customers for the immediate document are different from the ones with the insurance document.
- The customer search window will pop up. You can click search button or press enter to retrieve the top 11 customer for the selected document type.
- You can use any of the following search criteria inputs to customize your search retrieved results:
    - Customer's name, phone number or customer code.
    - All of the search entries are not case sensitive. However, they have to be exactly as they are written in the database.
- You can close the search window by clicking the exit button at the bottom of it or by pressing ESC button.

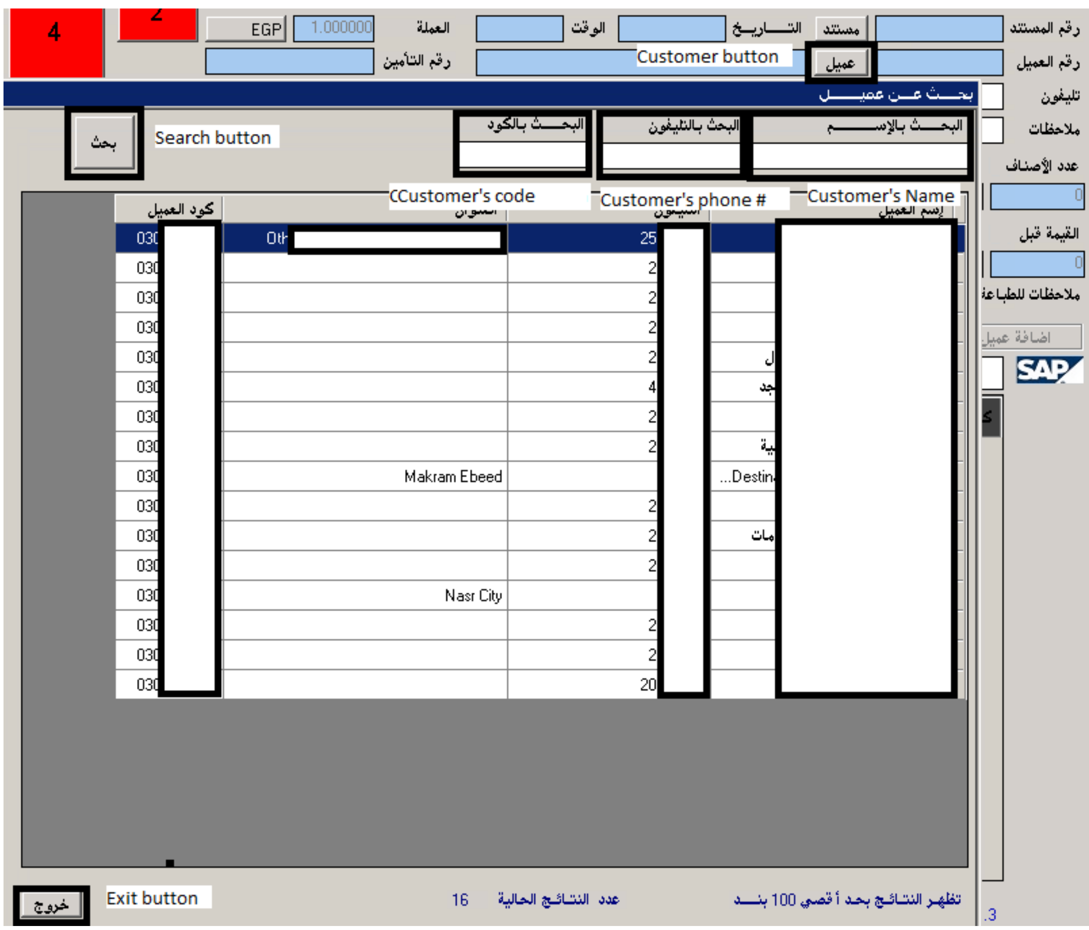


*Figure 22: Customer search*

### 3.3.5. Cancel a document, functionality

You can use that function to cancel the document that you are currently working on. This function is helpful with the wrong product adding, the patient decided to change any item or even decided to cancel the prescription for any reason. You can just click on the cancel button and it will cancel everything for you.


*Figure 23: Cancel operation button*

### 3.3.6. Delete an item from the temporary document, functionality

In case the document has lots of entries and items and you do not want to cancel all of it. You can follow these steps to delete the item and check figure 29:

- Select the item that you want to delete.
- Click the delete button at the bottom right side of the screen.
- Get back to your supervisor to confirm the operation on the authorization screen that will pop up.
- The item will still be available on the document and marked in different color. However, it will not be printed in the receipt nor required to be paid for.

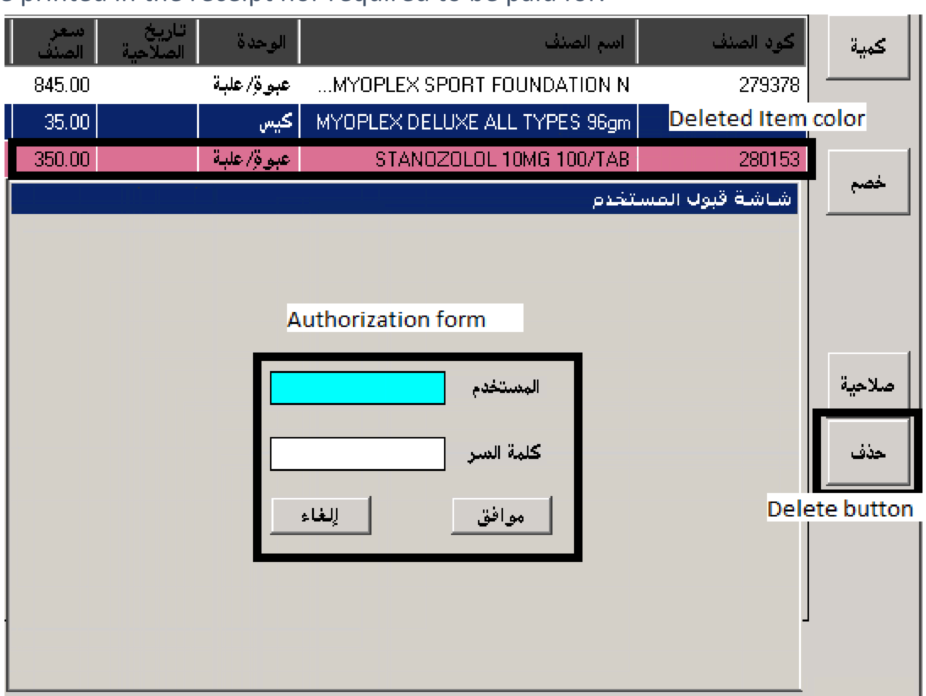


*Figure 24: Delete item from a document, authorization form*

## 3.4. Supervisor's functionalities

### 3.4.1. Supervisor's main screen

The below figure shows the main screen for the supervisor that he/she will be seeing once they log in.

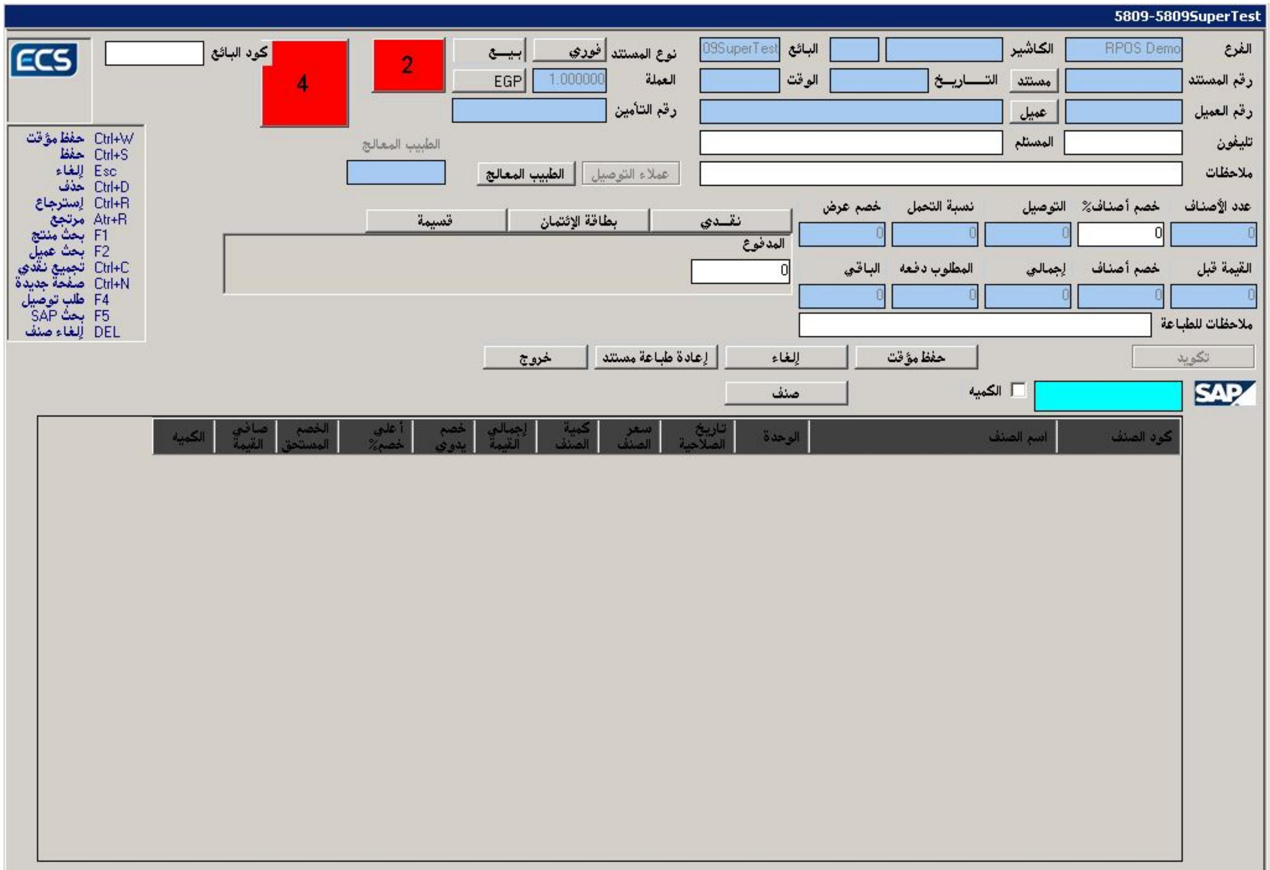


*Figure 25: Supervisor main screen*

## 3.4.2. Main function, (Return with reference and without reference)

These two operations are usually allowed for specific users which in our case are the supervisor and the manager. Once the allowed user logs in. They can follow the below steps and check figures 15 to 19:

- Change the operation type from a selling (Default value) to Return with reference or return without.
- Enter the invoice number in the authorization form that will appear after selecting the operation.
- If you choose return without reference, enter 000 as a reference number.
- Enter your username and password, then click submit in the same authorization form.
- In the return without reference, you will have to either scan the item or enter the item barcode in the dedicated cell or the last way is to search for the item and select it manually. (For instructions on the search for item function, you can refer to section 0.
- Check the state of the returned items, enter the quantity for each item in the invoice.
- Enter the expiration date for the without reference document if applicable.
- Enter any notes if applicable.
- Click the temporary save button or press Ctrl+W.

Note* for any insurance, Due payment document and promotion items, you will have to return all of the items in the invoice and you cannot divide it by items.

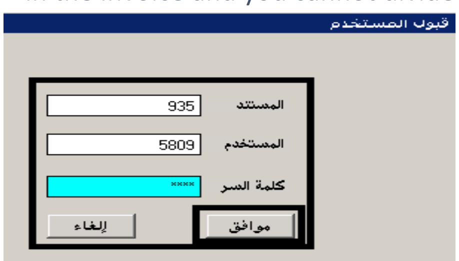


Figure 28: Authorization form


Figure 27: Change Operation, choices

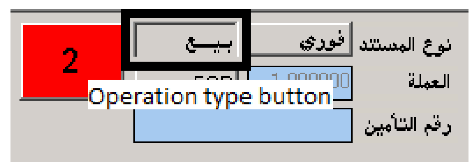


Figure 26: Change Operation, button

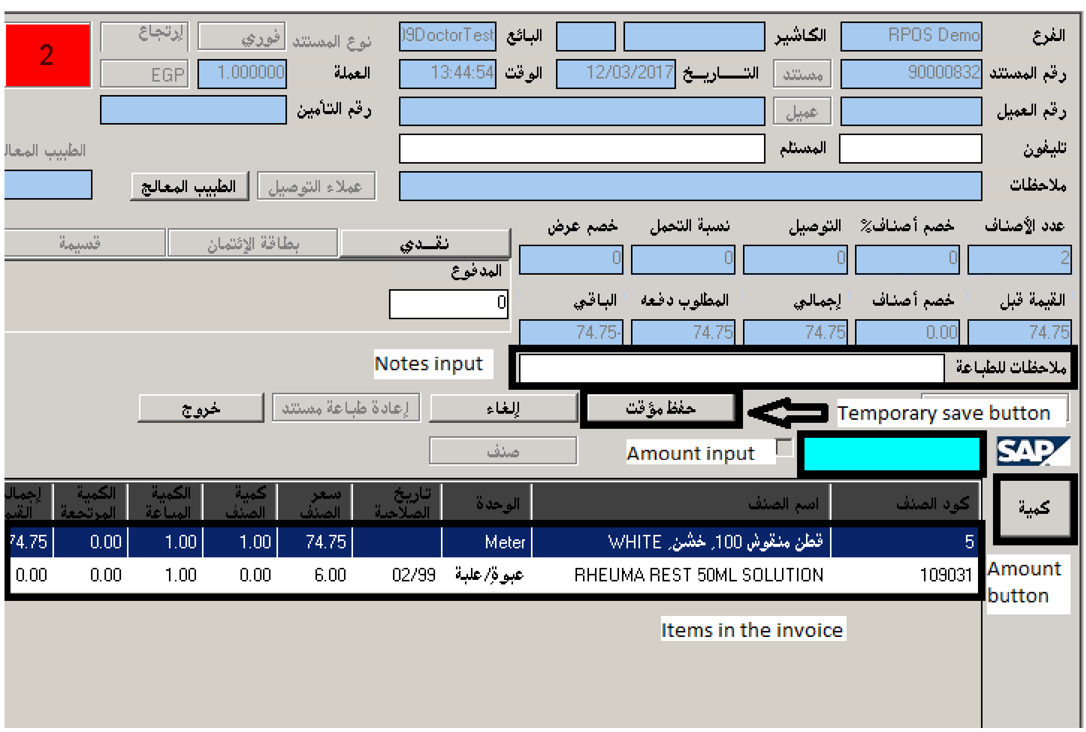


Figure 29: Return Operation, Interface

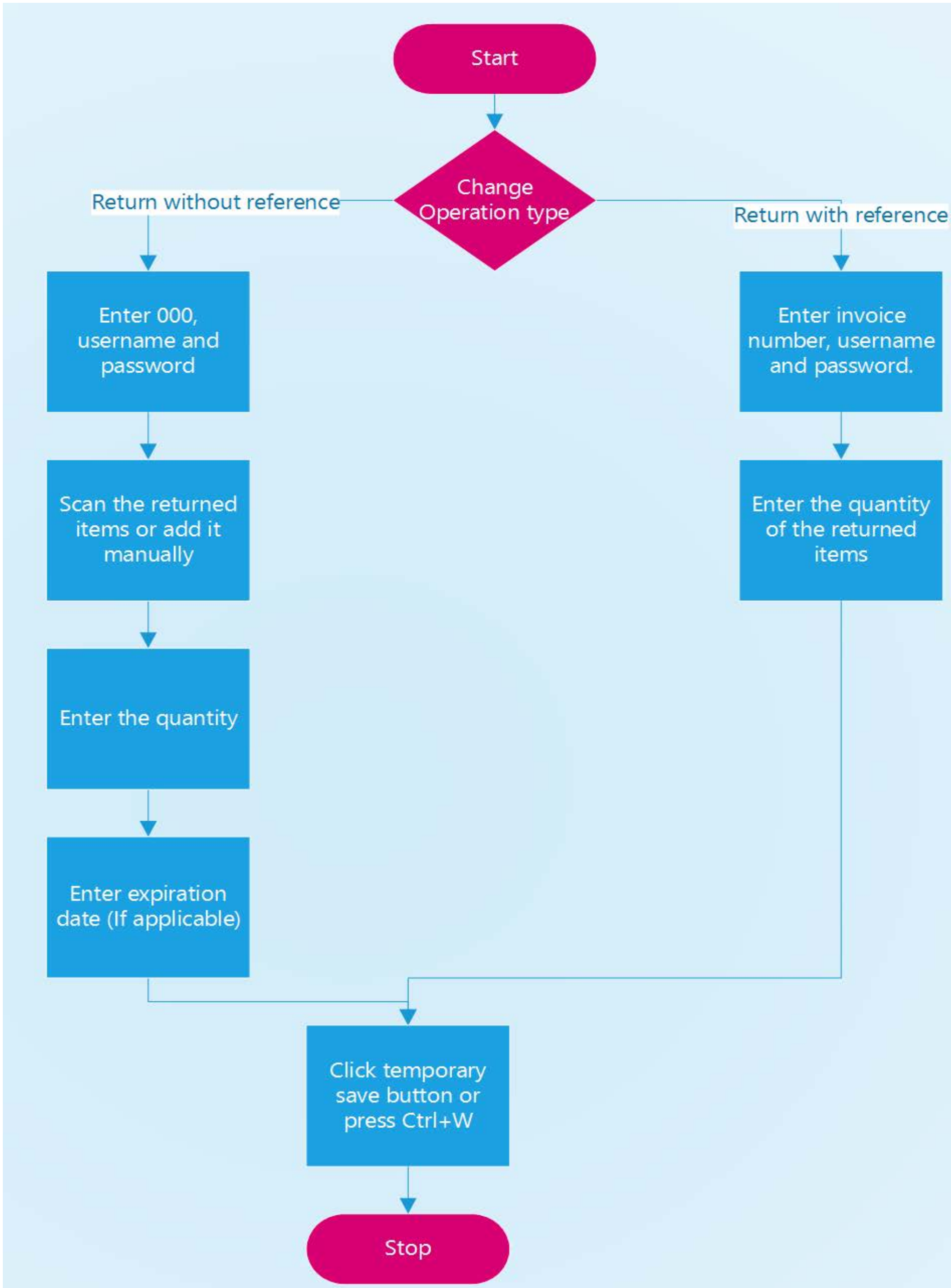


*Figure 30: Return Operation, Flowchart*

### 3.4.3. Supervisor's functions

This user type's functions are all mutual with the pharmacist except for the return with reference and without reference and they are explained in section 3.4.2.

Note that all of the functions are customizable from the system administrator's side. However, you will be finding all of the available functions in the table of contents so you can understand all of the functionalities in the REAL TIME POINT OF SALE.

 

## 3.5. Manager’s functionalities

### 3.5.1. Manager’s main screen

The below figure shows the main screen for the supervisor that he/she will be seeing once they log in.

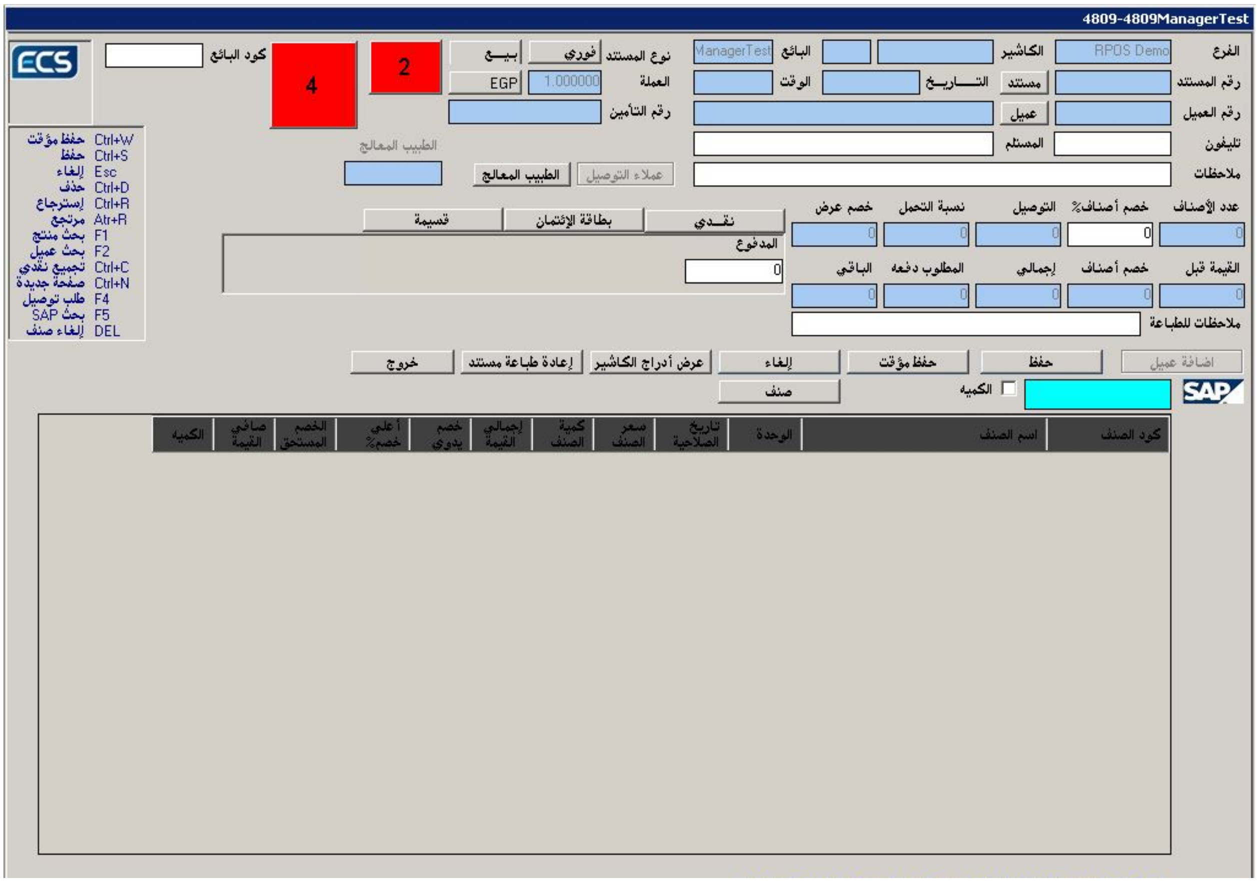


*Figure 31: Manager's main screen*

### 3.5.2. Show all of the cash registers, functionality

This function is only available for the managers to allow them to monitor and analyze the performance of the employees and for money collecting reports as well. You can follow the following steps to know how to use that function and check figure 30 as well:

- Click the show cash registers button.
- Customize your search criteria inputs by any of the following:
  - Cashier's name. (Who opened the register)
  - Date frame. (Start date and end date)
  - Register number.
- Select the cash register you want to see details about and you can see the details at the bottom of the popped up window.
- For the still open registers, you will see find the open and the close date for them either empty or their value is //.
- You can close that window by clicking the exit button at the top left side for it or pressing ESC button.


*Figure 32: Show cash registers window*

 

### 3.5.3. Delete a temporary document, functionality

If you want to delete a temporary document for any reason, you will follow the below steps:

- Login to the REAL TIME POINT OF SALE.
- Retrieve the document's information to the main screen by searching for it using the function in section 3.1.5.
- Click on the delete document button as figure 33.
- Enter your credentials in the authorization form that will pop-up and click enter or press the confirm button from figure 34.
- You will see a confirmation message at the bottom of the screen to confirm the delete operation as figure 35.

*Figure 33: Delete Document, button*

*Figure 35: Authorization form, Confirmation button*

*Figure 34: Delete document, confirmation message*

### 3.5.4. Item's Category search and retrieval, functionality

The items search function from section 3.3.3 is different from this one. As this function gives you the availability to see all of the categories' names and see all of sub categories under them and also the products under each category. It also allows you to retrieve the product to the main screen so you can add it to the document by following the below steps:

- Click on the item's category button from figure 36.
- Choose the category that you want as figure 37.
- Choose the subcategory if available.
- Choose the item that you want.
- You can retrieve it to the main screen by double clicking on it or pressing enter.
- You can close the items' search window by clicking the exit button at the bottom right side of the screen or press the ESC button.

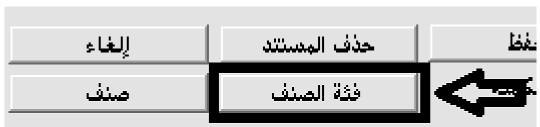


Figure 36: Item's category button

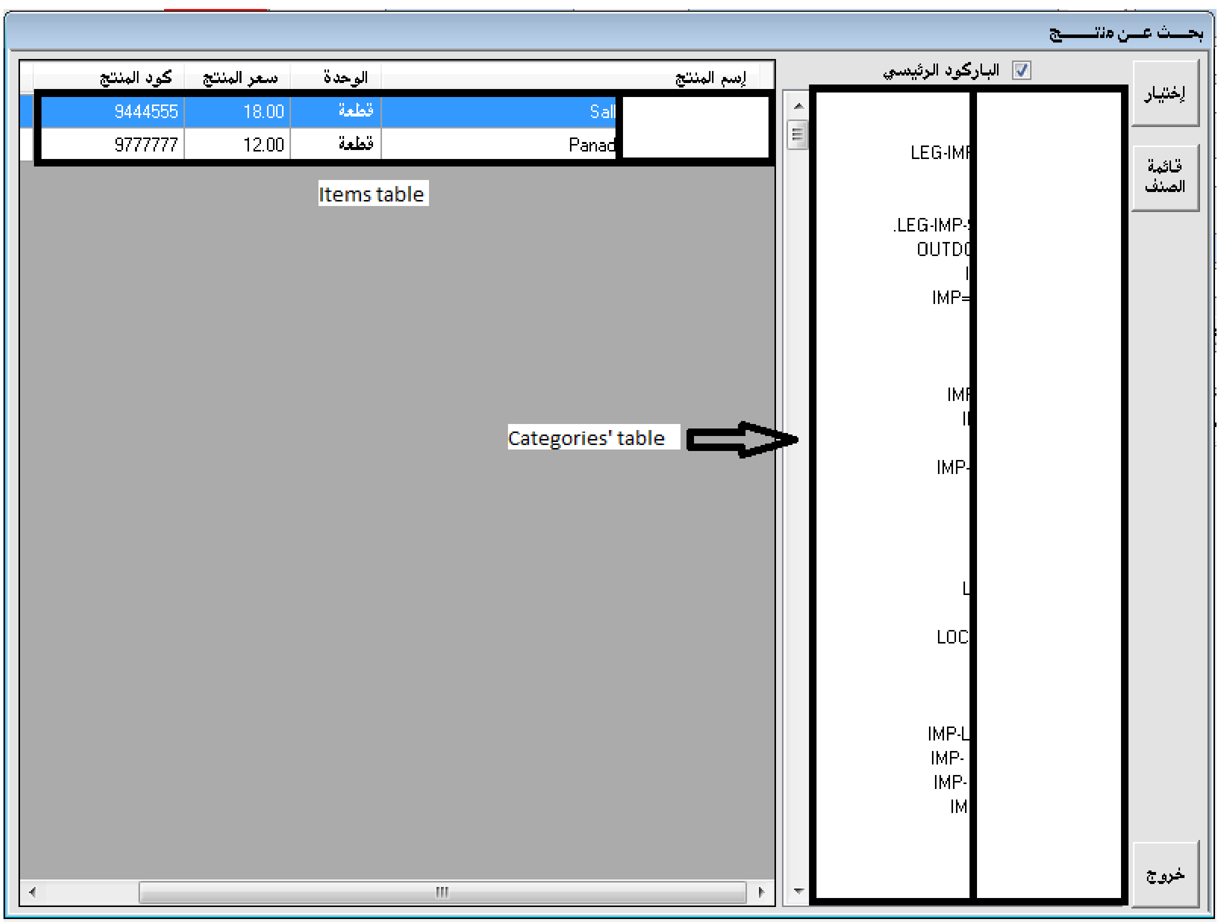


Figure 37: Item's category window, exit button

# 4. FAQ

## 4.1. What if I forgot my username and password or I have any login issue?”

Get back to your system administrator or IT department as they can reset your password for you and get your username as well.

## 4.2. What if I added an item to the invoice and then the patient or the customer said to remove it?”

You will have to get back to your supervisor in order to remove items from the invoice but our recommended solution for that is to cancel the document and re do it to save your time. Note that in insurance cases, the patient cannot neglect any item from the doctor’s prescription.

## 4.3. What if the patient wants to pay with the credit card and cash as well if he/she does not have enough cash?

You can combine any of the payment methods to best suit the case that you have.

## 4.4. What if the terminal turned off due to any issue while in the process of submitting an invoice or a temporary invoice?

The document or the invoice is not submitted to the server unless you click save/temporary save button or use the shortcut for it. You will have to turn the machine back on and re do the operation.

You have to **report that case** to your IT department in order to prevent it from happening again as it affects the business productivity.

## 4.5. What if during the payment process, the customer wanted to cancel?

You can click the temporary save button, give the receipt to the patient and write a note saying “Cancelled by PT”.

# 5. Instructions for error correction

As an end user, whenever you face any technical issue get back to your system administrators or the IT department as they are trained on those types of problems. Any business related case, get back to your supervisor before trying to do anything about it.

# Appendix A: Glossary

These are some of the terms or words you might need an explanation for:

- Module: Each user type is translated to the code as a module, each module has its’ own functions and permissions.
- Authorization: Some of the modules can authorize or approve some of the functions for other modules. (Get back to your consultants for more details about that.)
- FAQ: Frequently asked questions regarding the REAL TIME POINT OF SALE.
- Cashier: He/she is the person who is responsible for collecting the money from the patients or the customer.
- Pharmacist/doctor: He/she is the person who is responsible for reading the prescriptions and insurance cards info. Also, handing the medications to the patient or the responsible personnel who is responsible for handing them over to the patient.
- Endurance ratio: Each medical insurance company has different types of subscriptions and each subscription has different percentage that the patient has to pay and the insurance company will take care of the rest. For example:
    - The customer subscription type is A which is the highest and his endurance ratio is 3% so for any medications that he bought with the insurance, he/she will have to pay 3% out of the total cost in order to get covered.
- Due payment: The customer or the patient is registered in the system and he does not have enough money to pay for the medications now, so the pharmacist will use that document type the patient will take the medicine and pay later or pay part of the cost now and the remaining later.
- Immediate document: The patient or the customer will pay all of the cost now regardless what the payment method is.