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How to use PalermoPOS

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### Accessing PalermoPOS

Access to the PalermoPOS is done through a web browser. By default, your work station should be set up with a Chrome shortcut on your desktop that will launch directly to the PalermoPOS application.

Once you have opened PalermoPOS, you will be greeted by a login page. Enter your username and password that have been provided to you and press ‘Log In’.

### Using PalermoPOS

Using the web application is easy. All of the most common types of functions are grouped by what they are related to, and can be found by clicking the various links on the navigation bar at the top.

Each category has a side navigation bar that shows additional features. These bars are unique to each category, and provide easy access to most program functionality.

### Handling Orders

As a Palermo employee, most of your time using PalermoPOS will most likely be in the various Order screens.

To access today’s Orders, click the ‘Orders’ button on the navigation bar at the top. Each order will be listed by its current status - Pending, Completed, Cancelled, or Refunded. You can also see just the Pickup or Delivery orders currently pending by clicking the appropriate links on the side. Each order will have options for Cash Out, Edit, Receipt, Cancel, Refund, and Delete. Only admins can delete an order by default, and your ability to Cancel and Refund orders may be restricted by your manager.

Starting an order:

To start an order, click either ‘New Order’ or ‘Walk in Customer’ on the side bar. New Order will allow you to search for a customer using either their phone number, name, address, city, or zip code.

Once you enter a search criteria, a list of results will appear to the right. Click either the name of the customer to begin a pickup order, or the ‘Delivery’ button to begin a delivery order. This can also be changed on the main ordering screen.

You will see the main orders screen after this. This screen displays all the items currently added to the order, the order totals, and customer information.

Adding products and toppings:

From this screen you can either add individual items to the order, add the customer’s last order to this order (for customers who typically place the same order each week), add coupons, add comments, and submit the order to the kitchen.

At the bottom of the main order bar, you will see a list of product categories. Clicking these will display the products available in those categories.

Clicking an item to add it to the order will bring up a set of toppings or options to add to that product, if there are any available. Options that come on the product by default are shown highlighted in orange to begin with. Clicking additional options will highlight those.

From this screen, you can also add cooking details (well done, lightly cooked, etc) and any additional notes the customer may tell you about this particular item. You can also break the product down into halves and quarters if the customer needs toppings split up that way. Make sure to select all applicable options for each half or quarter.

Click ‘Save Item’ to add the selected options to the order. After this, you will return to the product selection screen, and be able to add additional products to the order.

Adding discounts:

The add coupons button will display any available coupons, and clicking one will attempt to add it to the order. Note that coupons typically have strict requirements and will not be added if those required products are not part of the order.

Finalizing the order:

Once you are done adding products and any discounts, double check to make sure all the details are correct. You can add a note to the order itself at this time, and then click either ‘Submit Order and Print’ or ‘Submit Only’. If you choose not to print, you can also do so again from the Today’s Orders screen.

You will be returned to Today’s Orders, and you should see your newly created order under Pending Orders.

Changing an order:

At any time after an order has been submitted, it can be modified by clicking the ‘Edit’ button from the Today’s Orders screen.

Cashing an order out:

Once the customer comes to pick up their order (or a delivery is made), you can cash that order out by clicking the ‘Cash Out’ button from the Today’s Orders or Pickup/Delivery screens.

This screen will give you an additional opportunity to add coupons to the order, in case a customer brings a coupon in that you were not aware of. It also lists a summary of the customer’s order so that you can verify that the order is correct.

This screen will allow you to enter a total in Cash or Credit that the customer is paying for this order, and also allows you to include a tip if they make one. Enter the amount being paid into the box, and then click ‘Cash This Order Out’.

The cash out page will display any change due back to the customer.

Cancelling or Refunding an Order:

TODO: coming soon

Deleting an order:

Deleting orders should be done with care and only rarely. Doing this will delete ANY RECORD that the order was ever placed. This is enabled only for admin users by default.

### Managing Users

You must be logged in as an admin in order to manage users.

Viewing all users:

Click on the ‘Users’ button on the top bar and you will be taken to the list of current users.

Adding new users:

Click on the ‘Users’ button on the top bar then click on the ‘New User’ button on the side menu bar to get to the creation screen. Add the name of the user in the name field. Add the username and password into username and password text boxes. Select user roles by clicking on the boxes next to the role you would like to give the user. Click the ‘Create User’ button to finish and create the new user.

Editing users:

Click on the ‘Users’ button on the top bar then click on the ‘View Users’ button on the side menu bar. Click the ‘Edit’ button next to the user you want to edit. The password must be entered or updated when editing a user.

Deleting users:

WARNING: Do not delete the admin user or it will need to be re-added by another admin user (if one exists) or your system maintainer.

Click on the ‘Users’ button on the top bar then click on the ‘View Users’ to bring up the list of users. Click on the ‘Delete’ button next to the user you wish to delete then click the ‘ok’ on the warning pop-up. The user will be completely deleted and this cannot be undone.

### Managing Customers

Viewing the recent customers:

Click on the ‘Customers’ button on the top bar then click on the ‘Recent Customers’ to bring up the list of recent customers. On this screen you can view the customer information in full detail, edit the customer information, and delete them.

Adding new customers:

Click on the ‘Customers’ button on the top bar then click on the ‘Add New Customers’ to bring up the list of recent customers. Fill in the customer's information in the appropriate fields. When all fields are filled in click the ‘Save Customer’ button to save and commit the customer.

Search customers:

Click on the ‘Customers’ button on the top bar then click on the ‘Search Customers’ to bring up the list of recent customers

Editing customers:

On the ‘Search Customers’ page, click the ‘Edit’ button next ot the user you wish to edit. Make any changes necessary to their information, and then click ‘Save Customer’.

Deleting customers:

On the ‘Search Customers’ page, click the ‘Delete’ button next to the user you wish to delete then click the ‘ok’ on the warning pop-up. The customer will be completely deleted and this cannot be undone.

### Managing Products

You must be logged in as an admin in order to manage products.

Viewing all products:

Click on the ‘Products’ button on the top bar then click on the ‘All Products’ to bring up the list of all products. From this menu you can view all products in the database.

Adding new products:

Click on the ‘Products’ button on the top bar then click on the ‘New Product’ link. Fill in the product's information in the appropriate fields. When all fields are filled in click the Save Product’ button to save and commit the product.

Editing a product:

On the ‘View All Products’ page, click the Edit button next to the product you wish you edit. After making necessary changes to the fields, press ‘Save Product’ to commit the changes.

Deleting a product:

On the ‘View All Products’ page, click the ‘Delete’ button next to the product you wish to delete then click the ‘ok’ on the warning pop-up. The product will be completely deleted and this cannot be undone.

Mass editing products:

Click on the ‘Products’ button on the top bar then click on the ‘Mass Edit Products’. Select the attribute you would like to mass edit in the ‘Select a field to alter‘ drop down menu. Then enter the new value in the ‘change value field’. Click the check boxes next to the product you would like to edit to the same value. Finally click the ‘Apply Changes’ to submit the changes.

### Managing Options

You must be logged in as an admin in order to manage options.

Viewing all options:

Click on the ‘Options’ button on the top bar then click on the ‘All Options’ to bring up the list of all options. From this menu you can view all options in the database.

Viewing specific category options:

Click on the ‘Options’ button on the top bar then click on the specific category you would like to view on the left side of the page. This will display that category’s options.

Adding new options:

Click on the ‘Options’ button on the top bar then click on the ‘New Option’ link. Fill in the option’s information in the appropriate fields. When all fields are filled in click the ‘Save Option’ button to save and commit the option.

Editing an option:

On the ‘View All Options’ page, click the Edit button next to the product you wish you edit. After making necessary changes to the fields, press ‘Save Options’ to commit the changes.

Deleting an option:

On the ‘View All ‘Options’ page, click the Delete button next to the option you wish to delete then click the ‘ok’ on the warning pop-up. The option will be completely deleted and this cannot be undone.

Mass editing options:

Click on the ‘Options’ button on the top bar then click on the ‘Mass Edit Options’. Select the attribute you would like to mass edit in the ‘Select a field to alter ‘ drop down menu. Then enter the new value in the ‘change value field’. Click the check boxes next to the options you would like to edit to the same value. Finally click the ‘Apply Changes’ to submit the changes.

### Managing Coupons

You must be logged in as an admin in order to manage coupons.

Viewing all coupon:

Click on the ‘Coupons’ button on the top bar then click on the ‘All Coupons’ to bring up the list of all coupons. From this menu you can view all coupons in the database.

Adding new coupon:

Click on the ‘Coupons’ button on the top bar then click on the ‘New Coupon’ link. Fill in the coupon information in the appropriate fields. When all fields are filled in click the ‘Save Coupon’ button to save the coupon.

Editing a coupon:

On the ‘View All Coupons’ page, click the Edit button next to the product you wish you edit. After making necessary changes to the fields, press ‘Save Coupon’ to commit the changes.

Deleting a coupon:

On the ‘View All Coupons’ page, click the Delete button next to the coupon you wish to delete then click the ‘ok’ on the warning pop-up. The coupon will be completely deleted and this cannot be undone.

### Management

You must be logged in as an admin in order to change settings or view management features.

Create new roles:

Click on the ‘Management’ button on the top bar then click on the ‘Role’ on the drop down menu to bring up the list of roles. Now click on the ‘Add New Role’ button on the side bar. Enter the new name of the role and click the ‘Save Role’ button to create the new role.

Edit roles:

Click on the ‘Management’ button on the top bar then click on the ‘Role’ on the drop down menu to bring up the list of roles. Click ‘Edit’ next to the applicable role. Alter the name as necessary and then click the ‘Save Role’ button to commit your changes.

Create new capabilities:

Click on the ‘Management’ button on the top bar then click on the ‘Capabilities’ on the drop down menu to bring up the list of capabilities. Now click on the ‘Add New Capability’ button on the side bar. Select the role this will apply to, the name of the action, and the name of the object that this action can be performed on and click the ‘Save Capability’ button to create the new capability.

Edit capabilities:

Click on the ‘Management’ button on the top bar then click on the ‘Capabilities’ on the drop down menu to bring up the list of roles. Click ‘Edit’ next to the applicable capability. Alter the drop downs as necessary and then click the ‘Save Capability’ button to commit your changes.

Cash out drivers:

Click on the ‘Management’ button on the top bar then click on the ‘Cash Out Drivers’ on the drop down menu to bring up the cash out drivers screens. Select the driver you wish to cash out, and click their name to show their cash out screens.

Printout end of day cash out:

Click on the ‘Management’ button on the top bar then click on the ‘End of Day Printout’ on the drop down menu. This will bring up the paper to be printed, click the ‘print’ button at the bottom of the paper or the ‘back’ button to return.

Configuration Settings:

Click on the ‘Management’ button on the top bar then click on ‘Configuration Settings’ to access PalermoPOS configuration settings. Each of the settings on this page is necessary for the program to operate, so Edit is the only option available.

Within the Configuration Settings page, click Edit next to the