toniq retail guides

Jobs

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<u>HINTS FOR MOVING AROUND, PRINTING OR VIEWING THIS MANUAL WITH ADOBE</u>

To move to a particular section on this manual simply click on the relevant heading from the Contents table on the next page. *(Press Ctrl and Home together to be returned to the start of this manual.)*

To print this manual (or specific pages) from the top taskbar select File, then Print. Ensure the printer you require is the one listed under Printer Name. In the Page Range section, choose All, Current Page or the Page range you require.

Adobe will normally open pages to be viewed at 154%. If you do not like the size of the pages displayed on the top taskbar click the drop box beside 154% and change to 100% (or the size you require).

Hints, Tips & Handy Info

Refer to another area of this (or alternate) manual

Warning, Important Information & Awareness

Full revision: April 2014 Version 5.02	Amendments:

Contents

INTRODUCTION

Job Processing is used to track the progress of a particular *Job* through its various stages.

For example, John Smith brings in a film to be developed, printed and put onto a CD. The job is recorded, then as each of the stages is completed (develop, print, complete) the job work order is moved on to a *More Complete* stage.

First a Job Template needs to be set up. You can have multiple *"Job Templates", e.g.:*

- Develop & Print
- Develop & Print, CD
- Develop & Print Double Set
- Develop & Print Double Set, CD

The templates allow you to create a *Job Sheet*, and normally include a grid for *Sale Items* sold in that *Job*, *Job Steps* involved and any other information you want displayed.

When John Smith brings in his film the staff member will recall his Client record (F5).
If using club cards, we can scan his club card, which automatically brings his name up on the screen, this saves pressing F5 Client and searching for him.

We then create a new job using the *Job Template* that matches his job requirements and print out a *Job Sheet*.

When the film has been developed (job step one), we scan the barcode on the *Job Sheet* and select the option *More Complete*. When the film has been printed (step two) the same process is done, then again when the CD has been *burnt (job step three)*. At this point the job is complete.

We can now charge that job, which will bring all the sale items through to the POS selling screen to be processed and completed, as any other sale would be.

Job Processing is an add-on module, there is a Jobs option in the registration screen, which needs to be set, and in Security there is also a Jobs option that needs updating depending on the access you want staff to have.

Some situations that Job Processing can be used for are

- Photo Lab
- Repairs, Quotes etc
- Hireage/Rental goods
- Bill of Materials for Gift Baskets

If the module is required, the Jobs option in the registration screen is set to *Yes* and a new registration code will need to be entered. Contact Toniq, phone 03-341-0195, PRIOR to making any system changes, to discuss pricing and new registration.

INITIAL JOBS PRINTER AND REGISTRATION SETUP

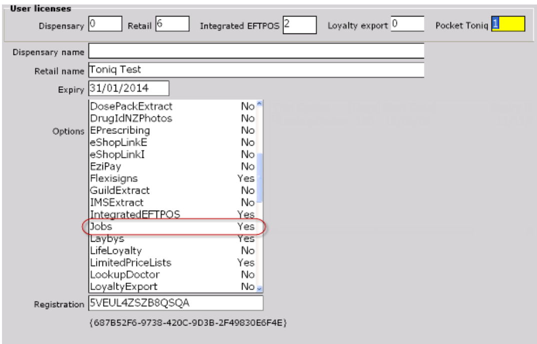
Registration

Jobs is an add-on module to Retail. You will need to contact Toniq to discuss pricing and new registration details prior to setup

Once your new registration has been confirmed, either:
From a PC with internet access:

- 7 Administration, 3 Registration
- F4 Check I/Net
- The Jobs line should have changed to Yes and Registration details should have been updated
- Press Y to 'Registration Downloaded' message
- F12 Accept Details

If you don't have internet access contact Toniq for assistance



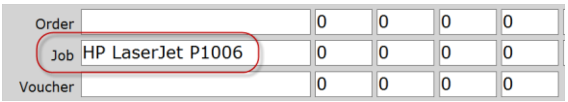
Printer Setup

You will need to set up the Printer that you want your job sheets to print to and you might also choose to set / check your Report printer at the same time.

The printing of Job sheets may be to the Printer set below, however each Job step can also have a printer (and margins) allocated – which may differ to the printer setup up below

- 7 Administration, 1 Setup, 2 Workstation Configuration, 1 Devices Setup
- Press the space bar in the "Job" printer field and select the printer you require.
- If you want to print Job 'reports' press the space bar in the "Report" printer field and select the printer you require.
- You can set margins if these are not controlled correctly by your printer driver setup
- F12 Accept Details

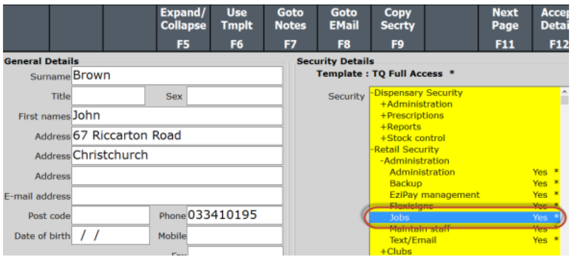
These settings are local to EACH computer and as such must be completed on all computers that you wish to print Job Sheets from.



Staff Security Settings

By default most staff have the ability to create and maintain Jobs. You can limit their access to this module as below

- 7 Administration, 4 Maintain Staff/Workgroups, 1 Maintain Staff.
- Recall the staff member you want to change/limit access on by typing in part of their name, pressing Enter and selecting from the list supplied, or by pressing the Enter key for a full list of staff



- Click the + beside Under the Security Details options, find and highlight the Jobs options and press spacebar to toggle between Yes and No.
- F12 Accept Details

JOBS TEMPLATES

You can create as many job templates as you like, based on the different types of jobs you may be using.

Creating a new Job template

- 7 Administration, 7 Module Administration, 1 Maintain Job Templates
- F3 Add to create a new *Job Template*.

Base Template Setup

If you would like to copy an existing template and change certain aspects to make a new template (after pressing F3 Add) press F6 Copy. You will be presented with a list of your existing templates. Use the numeric option to the left to make your choice. Then give the new template a different name and make any changes required as per the instructions below

Name: Give your template a name that is clear and will be easily recalled, *e.g. Dev & Print Double, CD*.

Template Note: This Template Note field is for internal use and does not print on the Job sheet. It is for notes specific to ALL jobs of this template type.
To start a new line whilst in this screen, press Ctrl and Enter together.
When you create a 'New Job' using this template this note will be displayed in black bold print, on the left, between the Due date/time and Job Note section and is only viewable on a POS PC.

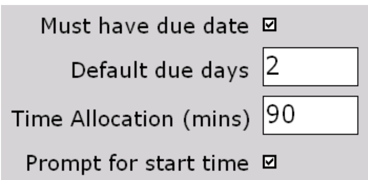
Must have a Due date*: Tick this box if you require all jobs using this template to have a due date. It will allow you to enter your own due date or if you have a 'Default Due Days' value entered and/or have 'Prompt for Start Time' ticked Retail will automatically work this out for you from the time the job is created (or the Start time specified (NB This date can be overridden)

Default Due Days*: Specify the number of days from receiving and entering this job (or the Start Date/time specified) until it should be completed/is due *(ie if each job of this template type should be completed 2 days from the time of entering the job into the system (or the Start date/time specified) enter 2 here)*

Time Allocation (mins)*: Specify the time that this particular job type should take in minutes (ie 90 for 1 hr 30 mins)

Prompt for start time*: Tick this box if you want each job to prompt for the Start Date and Time that the job should be commenced. Then based on the Default Due days and/or Time (mins) required above Retail will work out the Due Date and Time for you.

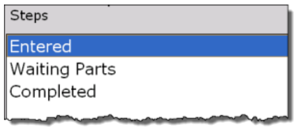
*If you have 'Must have due date' ticked and 'Time Allocation (mins)' set, the time the job was entered into the system + the Time (mins) from the Job Template will be the **Due Date/Time**



*If you have ‘Must have due date’ ticked and ‘Default due days’ set, the time the job was entered into the system + 24 hr for each Default day from the Job Template will be the **Due Date/Time**

*If you have ‘Must have due date’ ticked, ‘Default due days’ set and ‘Prompt for Start time’ is ticked, the time of the Start date entered + 24 hr for each Default day from the Job Template will be the **Due Date/Time**

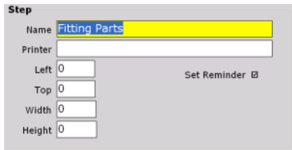
Steps
Each job is created with two Steps in the process (Entered and Completed). Steps are the various stages that your job is required to progress through, from start to finish.

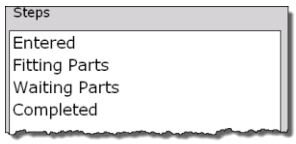


You can add additional steps to your job. Simply highlight the step that is immediately BEFORE your new required step (to have the new step added below), then F3 [Add Step]

- You can now type in the description for the new step
- Specific printer and margin settings for this new step to print to if a new job sheet is required at this step.
- If you want a Reminder flag to be automatically set once this Step is reached ON EVERY JOB, tick the Set Reminder box.

(*This flag is used later (see Reports – Job reminders) to produce a Contact list for texting, emailing or phoning customers).*
Alternatively a reminder can be set on an individual job from within the job itself.





By highlighting an existing step you can also use F4 Edit, e.g. to set the automatic Reminder flag or F5 Delete to remove this particular step.

You must have highlighted the correct step you wish to edit or delete, before pressing the function key.

Hide
If the template is no longer required, there is an option to hide it.

We recommended Hiding an old template (rather than deleting) in order to keep the job history intact. You will still have the ability to select this template in reports etc but will need to press F7 Show Hidden first to see it

Job Sheet Setup

Once you have the base information for your template it is time to create the Job Sheet itself

The size of the Job Sheet size is controlled by the Job printer set up parameters *(as previously set up in the Printer Setup section above)*

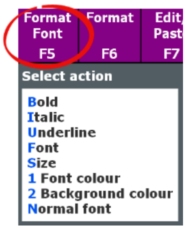
Press **F2 Edit J/S** to be presented with the new Function keys and to start your Job Sheet. This puts the cursor in the right hand panel. You are automatically in the insert mode so you can start typing.

Formatting options

You may choose to give your Job Sheet a name, e.g. Photo Processing, and want it to appear in larger, bold font, centered on screen etc.

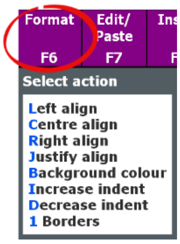
If you prefer the keyboard you can use the same commands as MS Word or WordPad. (i.e. Ctrl B turns **Bold on and off**. Ctrl U turns <u>underline on and off</u>. Ctrl I turns italics on and off, Ctrl C to copy, Ctrl V to paste.)

NB: You must be in F2 Edit J/S first
Use **F5** to format the font characteristics and **F6** to Format the position of the items to be inserted.



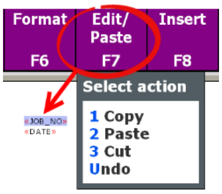
To change the font or appearance of a word or group of words “block” your selection, press F5 and then use the Format fonts selections available.

To change the position of a word or group of words “block” your selection, press F6 and then use the Format selections available.

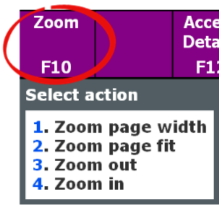


To “BLOCK”, i.e. Highlight words and/or fields, click on the start of the area (word or group of words), hold down the left button of the mouse, move the mouse to the right, then release the mouse button. Now continue with your job sheet creation by selecting the required formatting function key.

Use **F7** to Edit and Paste items that you have “blocked” etc, or to Undo your last change.



Use **F10** to Zoom around the page, viewing in different options



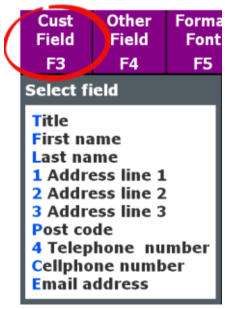
Customer details

If you have increased your font or formatting prior to now, i.e. for a heading, it is recommended to check that you have these back to a 'normal' size, i.e. font size 10, prior to adding your customer or product information.

You now need to select what and how you would like Customer information displayed on your Job Sheet.

NB: You must be in F2 Edit J/S first

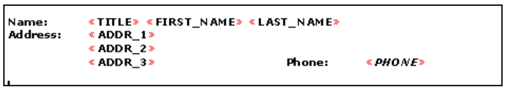
The available customer fields are:



If you want the lines that have Headings first, i.e. Name, Address etc., type these words in position first, before inserting the customer information field.

Then position the cursor where you want the Customer field to be inserted, then select F3 Cust Field and the appropriate selection, and continue until you have all the customer selections you require.

Example:
- Type in headings: Name, Address and Phone.
- Position your cursor to the right of "Name"
- Press F3, T (Title), then press space.
- Press F3 again, F (First Name), space
- F3, L (Last name), Enter,
- Position your cursor to the right of "Address"
- F3, 1 (Address Line 1), Enter,
- 2 (Address Line 2), Enter,
- F3, 3 (Address Line 3), Tab, Tab,
- Position your cursor to the right of "Phone"
- Press F3, 4 (Telephone Number)



Use F5 or F6 and 'blocking' to change the font and formatting if desired. See information in the 'Formatting…' details above.

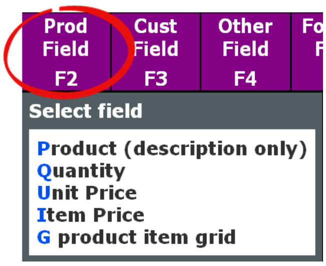
Product Details

If you have increased your font or formatting prior to now, i.e. for a heading, it is recommended to check that you have these back to a 'normal' size, i.e. font size 10, prior to adding your customer or product information.

NB: You must be in F2 Edit J/S first

Now you need to add fields to determine how the **product information, pricing** etc will appear on the screen.

Press F2 – Prod Field to bring up your options.

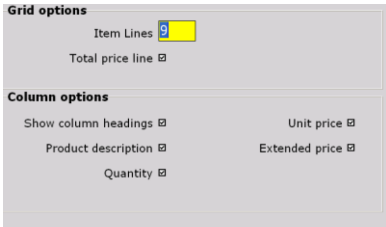


You have two main selections.
You can choose to have Retail add a **Product Item Grid**, which lets you choose whether to display Prod Description, Qty, Unit (price), Price (extended price) and Total price in a tidy grid format,
OR
You can choose to add individual selections of P - Prod (description only), Q – Quantity, U - Unit price and I –

Item price. These individual selections can also be used in other places on the Job sheet (ie along the bottom as secondary information to the Product Item Grid

Option 1 = Using the Product Item Grid … (the EASIEST OPTION)

After selecting F2 – Prod Field, select G – Product Item Grid. You can now choose what items you want to have on the grid:



Grid Options:
Item lines is maximum number of rows/products you think you will require for this job type

Total price line will display a Total Price Line at the bottom of the grid

Column Options:
Show Column headings will show Headings over the Prod Description, Qty, Unit (price), Price (extended price) and Total price columns

The remaining selections dictate whether each of these parameters will be displayed on the job sheets, select as many or as few as you require.

Press F12 Accept Details once you have made your selection and your new product grid will be displayed.

Item	Qty	Unit	Price
	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
		TOTAL	«TOTAL_$»

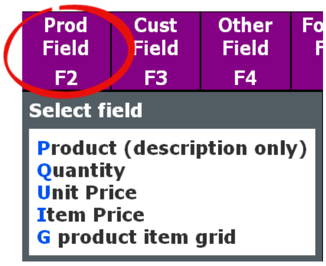
«JOB_NO»
«DATE»

You should only have one of these grids per template. If, after you have inserted a grid, you find you have not put enough rows or columns you can use F9 (Insert) Table/ Grid, then choose the appropriate option (eg 3 Insert Row Above). You then need to add the fields using F2 Prod Field. You will be asked what the index field is for the new data - count the grid to the position you need the new data in.

OR

Option 2 = Using the individual Product details:
You can also choose to use individual selections, rather than the Product Grid.

NB: You must be in F2 Edit J/S first



1. Move to the position on the Job Sheet that you want to insert this new information and press F2 key. Make your selection (P, Q, U, I).
2. Enter the index number for the product line you require, ie Index number 1, for product 1.
3. F12 to Accept once you have completed your requirements

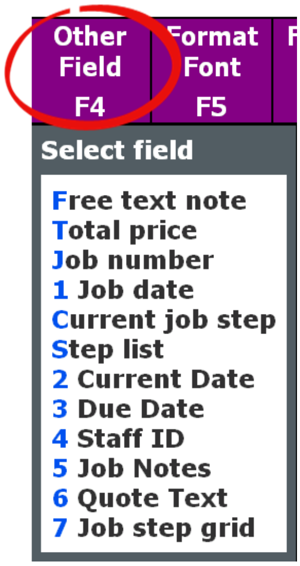
Use F5 or F6 and 'blocking' to change the font and formatting if desired. See information in the 'Formatting…' details above.

Additional Details and Features

In addition to the Product and Customer information you may like additional information to appear on your Job Sheet.

The following only inserts the 'Field' entered. If you require a Heading to appear first, i.e. Total, you will need to type the appropriate wording into position first, and then select your field.

Inserting other Text information ….
NB: You must be in F2 Edit J/S first



Move to the position on the Job Sheet that you want to insert this new information and press F4 key. Make your selection.

Free Text Note:	This is a FREE TEXT field specific to each job itself. *(Information can only be entered when you are in each particular job by pressing the F6 Free Text option. This is NOT the template note)*
Total price:	Creates a field to display and print the Total Price
Job number:	Creates a field to display the allocated Job number
Job date:	Creates a field for the date job was created
Current job step:	Creates a field to display and print the current step the job is at, at time of printing
Step List:	Lists all steps in the job
Current Date:	Creates a field to display and print the current date, at time of printing
Due Date:	Creates a field to display and print the due date
Staff ID:	creates a field to display and print the Staff ID
Job Notes:	creates a field to display and print any notes typed into the Job Note field on each particular Clients job
Quote Text:	creates a field of text to display the word QUOTATION when the Quote box is ticked on a job but you can type in a different word to be displayed instead (eg Quote)
Job step Grid:	creates a grid format that will displayed and printed on your job sheet showing all the steps on the job. You will prompted to enter no. of columns, column heading, table width, alignment and border requirements. This can be used for staff to date and initial each step of the job as it is completed

F12 to Accept once you have completed your requirements

Use F5 or F6 and 'blocking' to change the font and formatting if desired. See information in the 'Formatting…' details above.

Insert Graphical Features:

You also have the ability to add Graphical features to your Job Sheet to make it more user friendly and appealing to look at

NB: You must be in F2 Edit J/S first

Move to the position on the Job Sheet that you want to insert this new features and press F8. Make your selection.

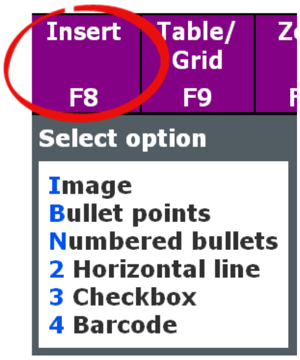


Image: Allows you to put your logo or some other image onto the J/S

Bullet points: Show important points to be considered by the technicians

Numbered bullets: Bullets by numbers

Horizontal line: Separate various sections of the J/Sheet using a Horizontal Line. Only one size available

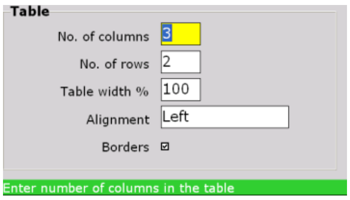
Checkbox: You may want the technician to indicate that stand tasks have been done or not

Barcode: This will create a Barcode for the J/S so that it can be scanned at the POS

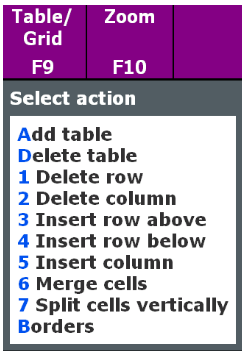
F12 to Accept once you have completed your requirements

Inserting additional Tables / Grids:

You have the ability to add an additional table/grid. Press F9 then A to add. Enter your table's requirements and press F12 to Accept.



Once you have added your table you can now press F9 again and will be presented with additional options for altering your table/grid.



If you have not put enough product lines into your original Product rows or columns into the grid then you can use the insert Table/grid F9 and then add the fields using the Prod Field F3.

EXAMPLE of a completed Job Sheet Template

Annual Check Up

Client: «TITLE» «FIRST_NAME» «LAST_NAME» **Ph:** «PHONE»
Job No.: «JOB_NO» **Job Date:** «JOB_ENTRY_DATE» **Due Date**«DATE»

Job Sheet Notes: «JOB_NOTES»

Item	Qty	Unit	Price
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
«PROD_DESC»	«QTY»	«UNIT_$»	«PRICE»
		TOTAL	«TOTAL_$»

These are the steps to check:

- Back tyre ☐
- Front tyre ☐
- Back breake pads ☐
- Back brake action ☐

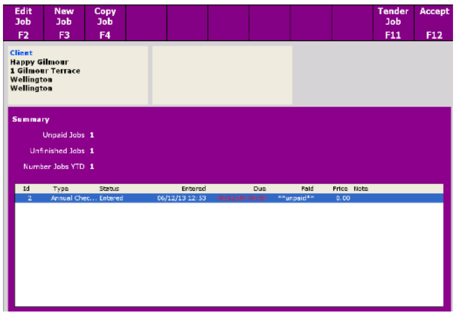
Editing an existing Job template

- 7 Administration, 7 Module Administration, 1 Maintain Job Templates
- Press the spacebar and you will be presented with a list of existing available templates to make your selection from.
- Press F2 to Edit J/S, click in the area you wish to edit and then proceed as per instructions for setting up a new template.

JOB PROCESSING

Job Information Screen

Once in the POS Selling screen press F5 and select the client *(or scan the Client Club Card and the client details immediately appear on the screen).*



Press F3 Jobs to go to the Client Job Information screen

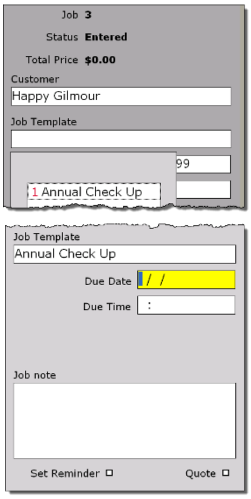
The Client Job Information screen shows a list of Jobs, their current status, the date they were entered, the date they were paid, the price of the Job and the first 25 characters of the note field.

You can arrow up or down to highlight a job, then make a selection:

- F2 Edit Job, allows you to edit the highlighted job (explained in more detail on the following pages)
- F3 New Job, creates a new job (explained in more detail on the following pages)
- F4 Copy Job, copies the highlighted job
- F11 Tender Job, charges the highlighted job through to the POS selling screen
- F12 Accept, takes you back to the POS Selling screen

Starting a new Job

From the POS Selling screen, press F5 and select the client *(or scan the Client Club Card)*



F3 Jobs to go into the Client Job Information screen

F3 New Job from the Client Job Information screen brings up a new Job screen. The customer name is brought through automatically and a Job Number generated and displayed.

Press the spacebar in the Job Template field to get a list of available Job Templates. Select the Job Template you wish to use.

If a Start Date/Time is required (due to the Template setup) you should enter this information as prompted

The Due Date and Time will automatically be filled in for you (based on the template setup).

If a Due date is required, you should enter this information in the Due Date field now.

If “Must have Due Date” and “Default Due date” have been ticked during the Template setup (Base Template details) these fields will automatically be filled in for you.

If this is simply a Quote at this point, press F4 Quote, or tick the Quote box at the bottom of the page. If your job template has a Quote Text field this will now be displayed on the Job Sheet.

At this point the Job Sheet is ready to be Printed (F11 Print Job) and Saved (F12 Accept Details)

NB: If the Due Date entered is in the past you will be prompted to F [Fix Now] which will return you to the Due Date field or C [Continue] which will leave the ‘past’ due date as is

Progressing through Job steps

At each completed stage of the job, the job steps should be updated.

Go back into the POS Selling screen.

If your job sheet has a barcode simply scan it to recall the Job details and press 2 to advance the job onto the next stage. When all steps are completed you will only have options 1 and 3 available.

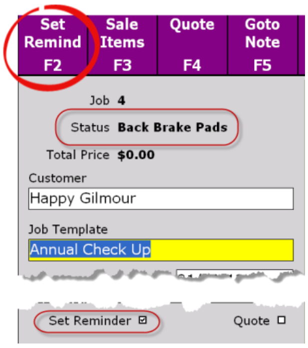
Choose option for job : Job/Quote 20931; Status : Entered
1 Tender job
2 More complete
3 Edit Job

Choose option for job : $80 DOUBLE 20936; Status : Completed
1 Tender job
3 Edit Job

If the job sheet barcode will not scan for some reason, press F10 [Other], 7 [Recall job], type in the job number and press Enter

If you have no barcode or job sheet available, press F5 and select the client or scan the Client Club Card, then press F3 Jobs, highlight the job required then F2 Edit Job

F8 More Compln - moves the job from one status (job step) to the next status (job step)
F9 Less Compln - moves the job back one status (job step) to the previous status (job step) if a step has been accidentally advanced



The new status of the job is displayed on the left hand side of the screen.

If the job has reached a point at which you want to send the customer a Reminder text/email/phone (and the job template does not have an automatic Reminder flag set, see 'Base Template Setup' section, you can press F2 Set Remind, or simply tick the Set Reminder box, now. This flag is used later (see Reports – Job reminders) to produce a Contact list for texting, emailing or phoning customers.

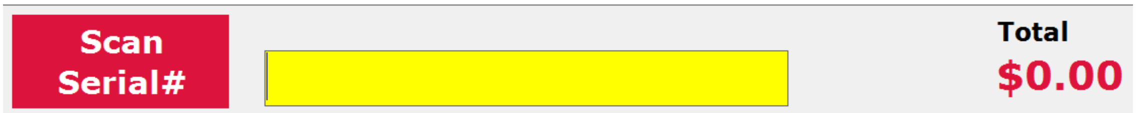
If this job was originally a Quote but has now been accepted, press F4 Quote, or untick the Quote box at the bottom of the page. If your job template as a Quote Text field this text will no longer be displayed on the Job Sheet.

<u>Adding items to the job</u>

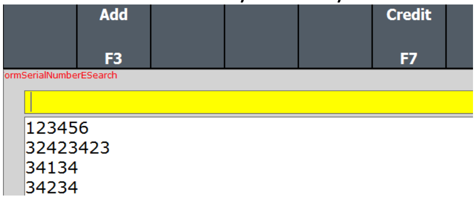
Items that are used on this job can also be added at any point and should be as they are used, to ensure that your stock ordering is correct. Press **F3 Sale Items**. Type in PLUs or product descriptions as required, changing quantities as necessary. You can also price edit, discount and credit items that you may be swapping out from this screen, by pressing the F8 Price Edit option.

Item	Qty	Unit	Price
[API Barrier Cream 555 100g]	[1]	[$7.49]	[$7.49]
[AUM Nourish Set Xmas12]	[1]	[$40.00]	[$40.00]
[ ]	[ ]	[ ]	[ ]
[ ]	[ ]	[ ]	[ ]
[ ]	[ ]	[ ]	[ ]
[ ]	[ ]	[ ]	[ ]
		TOTAL	[$47.49]

If you are adding a 'serialised' item to the sale you will prompted to scan (or type in) the Serial number.



If you don't have the serial number available (or eg, the item is too heavy to lift) press ENTER for a list of serial numbers already in the system. You can also F3 Add from this screen or F7 Credit if returning an item.



See the Serialised stock section of the Stock Maintenance manual for more information about using 'Serialised' to track item serial numbers in detail

Items added at this time are NOT reduced from your current SOH figures UNTIL THE SALE IS ACTUALLY TENDERED. However they will show on the products stockcard (under F4 stock) as a quantity against Stock Use Jobs and as such will be picked up by the automatic ordering system if in use.

Press F12 Accept Details once to leave the Sale Items screen
Press F12 Accept Details again to save the Job Sheet and returns to the Client Job Information screen

If the Due Date on the job is in the past you will be prompted to F [Fix Now] which will return you to the Due Date field or C [Continue] which will leave the 'past' due date as is.

Editing Jobs

Jobs can be edited at any time during the process. Simply go onto POS Selling press F5 and select the client or scan the Client Club Card, then press F3 Jobs, highlight the job required, then F2 Edit Job. Make any changes required, like adding items to the jobs (see above) and then F12 to Accept changes.

Completing / Tendering a Job

When a job is finished and is ready to have the items added and/or be charged out, return to POS Selling, and either scan your job sheet barcode. If the job sheet barcode will not scan for some reason, press F10 Other, 6 Recall job then type in the job number and press Enter. Alternatively press F5 and select the client *(or scan the Client Club Card)*, then press F3 Jobs, highlight the job required then F2 Edit Job.

If you scan a barcode and the job is at a Completed status you will be presented with options to 1 Tender Job (if all items have already been added) or 3 Edit Job to go into the Job itself and add items.

Go into F3 Sale items, and ensure that you have included all the items sold, in the normal manner. You can also price edit, discount and credit items that you may be swapping out from this screen, by pressing the F8 Price Edit option. F12 Accept once you have all the items required. These items will now appear on the job sheet displayed on the right.

If you are happy with the job at this time, ensure the Job is at a "Completed" status *(press F8 More Compln if it is not),* choose F11 if you wish to Print the Job again, and then F12 to Accept.

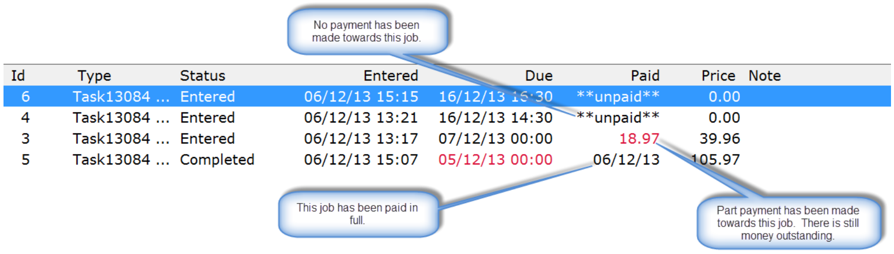
If the customer is already on site, ready to pay, press F11 Tender Job and then F12 Accept to be taken directly to the POS selling screen again and tender the sale as per normal process, which will in turn update your SOH, sales figures etc.

It is not possible to tender a job whilst it is still marked as a Quote. If you do try you will be prompted to 'Clear Quote and continue tender' before being allowed to continue.

If the customer is not at site, simply F12 to Accept the job un-tendered. This job is now ready to be recalled when they do come into store to collect their Job. When they do come into store, ready to pay, simply scan the job barcode at POS and select 1 Tender Job, or press F5 and select the client *(or scan the Client Club Card)*, then press F3 Jobs, highlight the job required then F11 Tender Job, F12 Accept and continue tender the sale as per normal process.

Multiple tendered transactions.
It is possible to have a multiple tender transaction, however please note that this can get messy as each payment is a separate transaction. A multiple tender transaction may occur if you take a deposit or a customer wants to make some payment up front. The first payment is taken as normal. When you review the customer job information screen, the Paid column will help identify if additional tender is required

- **unpaid** means no payment has been received
- A Red value means partial tender has been received
- A Black date means full payment has been received



Id	Type	Status	Entered	Due	Paid	Price	Note
6	Task13084 ...	Entered	06/12/13 15:15	16/12/13 16:30	**unpaid**	0.00	
4	Task13084 ...	Entered	06/12/13 13:21	16/12/13 14:30	**unpaid**	0.00	
3	Task13084 ...	Entered	06/12/13 13:17	07/12/13 00:00	18.97	39.96	
5	Task13084 ...	Completed	06/12/13 15:07	05/12/13 00:00	06/12/13	105.97	

If a job is being paid in two payments, when you select and attempt to tender the job the second time you will be advised "Job already tendered – Tender again?", select Yes and F12. When prompted again select Yes BUT now the items paid in the FIRST payment should then be REMOVED (deleted) from the second transaction sales screen, leaving only the UNPAID for items, so the customer (and stock) is not charged twice for these initial items.

USING JOBS for QUOTES

The Quoting function in Toniq Jobs allows you to utilise your existing templates and turn them into a Quote. Any items added as Sales Items whilst the Job is a QUOTE will NOT be classed as Stock in Use and will not affect ordering, reports etc.

However once the customer accepts the quote you can simply turn the Quote flag off on the original job, reverting it to a standard Job and stock will now be assumed to be 'in use' on the stock card and will be taken into account with orders.

Setting Up Quoting

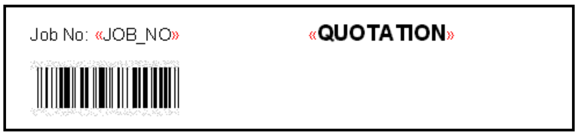
Simply update your existing template with a "QUOTES" text field. Go into Administration, Other Administration, Maintain Job Templates. Press the spacebar and recall the appropriate template.

Press F2 Edit J/S. Select a place in the template that you would like the word QUOTATION to appear on the job sheet when needed.

Press F4 Other Field, then 6 Quote Text. You can leave the text as is (Quotation) or change it by highlighting the new text and retyping your preferred text. And you can also use the Formatting options, i.e. F5, to change its appearance.

This text will only appears on your job sheet IF you tick the Quote option when creating a job. All job templates will have the 'Quote' tick box, however the wording Quote or Quotation etc. will only appear on Quote job sheets if you have added this Quote text field to your template.

Press F12 Accept Details when happy with the fields location etc.



Making a Quote

Create a new job as normal, recalling the appropriate job template.
To make this job a Quote, there is the option to tick the Quote box at the bottom of the screen (or simply press F4 Quote).

Job information and sales items can be added in the normal manner and the text that you set on the template, e.g. QUOTE, will be displayed and printed on the job sheet.

Also when you review this clients Job Information, these jobs will appear with a red Q between the Id and Type fields to indicate this is currently a Quote only not a job.

Id		Type	Status
878	Q	Repair	Entered
877	Q	Repair	Entered
876		Repair	Entered
875		Repair	Entered

When the customer accepts the quote, simply go into Edit Job as normal and UNTICK the Quote box reverting it to a standard Job, stock will now be assumed to be 'in use' on the stock card and will be taken into account with orders.

It is not possible to tender a job whilst it is still marked as a Quote. If you do try you will be prompted to 'Clear Quote and continue tender' before being allowed to continue.

Two new options have also been added to the Job Status Report 'Criteria' selection – Quoted Jobs Only and Included Quotes Jobs. NB: If you select Included Quote jobs, these will appear in the report as normal but will have an * in front of the Job Number to indicate it is a Quote.

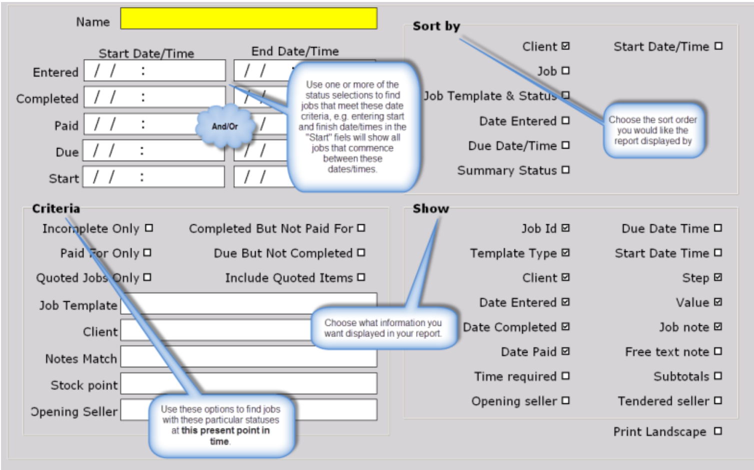
876	Repair	Test Test
*877	Repair	Test Test
878	Repair	Test Test

REPORTS

Job Status

You can use this report to review the status of all the Jobs in Retail, based around various selection criteria, making this report very flexible. You can also choose to Sort by various options and recall by particular Job statuses etc.

- 6 Reports, 5 Job Reports, 1 Job Status.
- Press Enter to display a list of existing reports or press F3 Add to generate a new report. If this is not an existing report and you would like to reuse it, type a Name into the Name field.



Fill in only those fields that you require.   You can use selection criteria from any or all of the Fields (Date range, Criteria, Sort by, Show)

⚠ Using a Criteria only report (without any date ranges selected) will take quite some time to run

Date Ranges

If you want to review Jobs that "entered" a Status type within a particular date range, enter Start and End Dates **and Times** in the appropriate Status field (ie Entered, Paid, Due, (due to) Start).

⚠ Always enter the date AND time

Criteria

Tick the boxes required (more than 1 combination of options can be selected):
Incomplete Only, Completed but not Paid For, Paid for Only, Due but not Completed, Quoted Jobs only, Include Quoted Jobs

Job Template:	Press the spacebar and select from the available Jobs templates
Client:	Type in part of the client name and press Enter to be presented with available options
Notes match:	Type in part of the information from the Notes field
Stock Point:	Leave field empty to report on all available Stock Points or press the spacebar and select from the available Stock Points. This will find jobs with items from a particular Stock Point.

If a job has items from multiple stock Points the job may appear in multiple reports

> ***NOTE: All selections made here are based on CURRENT STATUS, as at the date and time of running this report.*** *It will not be reviewing jobs that are incomplete and due at a future date, regardless of any time ranges you may have entered above*

Sort by

Tick the Sort order in which you would like the report to be presented:
Client, Job, Job Template & Status, Date Entered, Due Date, Summary Status or Start Date/Time

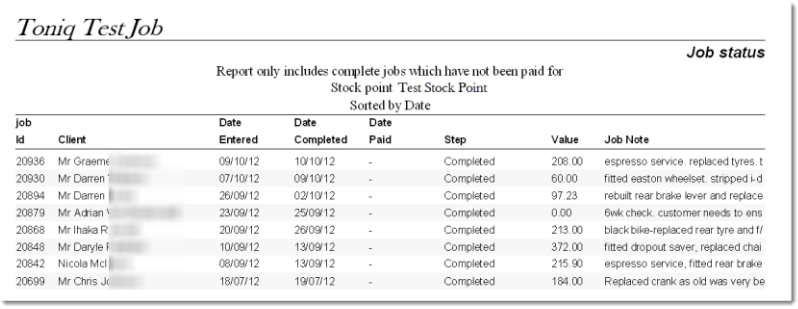
Show

Tick the details that you would like displayed on your report:
Job ID, Template Type, Client, Date Entered, Date Completed, Date Paid, Time Required, Due Date Time, Start Date Time, Step, Value, Job Note, Free Text Note, Subtotals

Print Landscape

When ticked this report will print to the Landscape printer assigned in Device Setup, instead of to the Report printer.

Below shows the report for Date Entered 01/07/13 to 30/10/13, sorted by date entered.



Toniq Test Job

Job status

Report only includes complete jobs which have not been paid for
Stock point Test Stock Point
Sorted by Date

job Id	Client	Date Entered	Date Completed	Date Paid	Step	Value	Job Note
20936	Mr Graeme	09/10/12	10/10/12	-	Completed	208.00	espresso service. replaced tyres. t
20930	Mr Darren	07/10/12	09/10/12	-	Completed	60.00	fitted easton wheelset. stripped i-d
20894	Mr Darren	26/09/12	02/10/12	-	Completed	97.23	rebuilt rear brake lever and replace
20879	Mr Adrian	23/09/12	25/09/12	-	Completed	0.00	6wk check. customer needs to ens
20868	Mr Ihaka R	20/09/12	26/09/12	-	Completed	213.00	black bike-replaced rear tyre and f/
20848	Mr Daryle	10/09/12	13/09/12	-	Completed	372.00	fitted dropout saver, replaced chai
20842	Nicola McI	08/09/12	13/09/12	-	Completed	215.90	espresso service, fitted rear brake
20699	Mr Chris J	18/07/12	19/07/12	-	Completed	184.00	Replaced crank as old was very be

If you select Included Quote jobs, these will appear in the report as normal but will have an * in front of the Job Number to indicate it is a Quote

*You can use the **Start** Start/End Date/Time in conjunction with **Sort by** Start Date/Time and **Show** Start Date/Time, Due Date time and Time required as a 'rough' calendar*

Job Stock Use

Run this report when you are about to complete a stocktake as it will help account for stock that is currently allocated in the Sales Items of a Job, but has not been tendered and as such the current SOH figures have not been adjusted yet.

Quoted jobs do not affected the SOH figures and will not be displayed in this report as the items are not considered as IN USE yet.

By default this report is sorted by Product Description. Press the spacebar in the Sort by field and make your selection, e.g. Description/Department will subtotal the items into Department, listed alphabetically.

The generated report will list the PLU of the product (or manufacturer code if no PLU is assigned), the description and the quantity outstanding for ALL untendered jobs, along with Department and Location.

If you tick Show job information your report will also show you details about the jobs that the stock is actually IN USE on.

The figures displayed in this report + the stock on shelf = current SOH figure for Retail

- From the main menu select 6 Reports, 5 Job Reports, 2 Job Stock Use
- Tick Show Job Information if required
- Press the spacebar in the Sort by field to select a sort order
- Press the spacebar to select a particular stock point (leave blank for all or if only one stock point)
- Press F12 to Accept Details

Criteria
Show job information
Sort by Description
Stock point

Press F10 to view report, or F12 to print

WITHOUT Show Job Info ticked

Job Stock Use Report 9 Dec 2013 4:22pm **Toniq Test** Page 1

PLU	Description	Qty	Department	Location
1013637	Avid Elixir CR/C/5 Lever Internal Kit	1	Brakes - Parts	
95733	Avid Juicy Hose Barb	1	Disc - Hydraulic	
95734	Avid Juicy Olive	1	Disc - Hydraulic	
87691	BBB Barends Ergostick M	1	Handlebar Ends	
87651	BBB Cantistop Pads 65mm	1	Brake Pads - Rim	
80266	BBB Inner Brakewire S/S MTB 1.6mm x 1.7mtr	4	Brake - Cables	
88587	BBB Speedcage Black Anodised	1	Hydration - Cages	
81252	Beto/Pulse Baby Seat Rack 700c Disc	1	Carriers/Trailers/Bungees	
86808	Brake Barrel Adjuster 7mm	1	Brakes - Parts	
95769	Chain Pin Shimano 10sp	1	Chain Tensioners/Links	

WITH Show Job Info ticked

Job Stock Use Report 9 Dec 2013 4:25pm **Toniq Test** : Page 1

PLU	Description		Qty	Department		Location
Qty	Customer	Job	Job Type		Due Date	Status
1013637	Avid Elixir CR/C/5 Lever Internal Kit		1	Brakes - Parts		
1	Mr Darren Leslie	20894	Colombo Job/Quote		02 Oct 2012	Completed
95733	Avid Juicy Hose Barb		1	Disc - Hydraulic		
1	Mr Darren Leslie	20894	Colombo Job/Quote		02 Oct 2012	Completed
95734	Avid Juicy Olive		1	Disc - Hydraulic		
1	Mr Darren Leslie	20894	Colombo Job/Quote		02 Oct 2012	Completed
87691	BBB Barends Ergostick M		1	Handlebar Ends		
1	Daniel Arrando	19813	Colombo Job/Quote		12 Dec 2011	Entered
87651	BBB Cantistop Pads 65mm		1	Brake Pads - Rim		
1	Mr Chris Johnson	20699	$50 SINGLE SHOT (ESP		19 Jul 2012	Completed
80266	BBB Inner Brakewire S/S MTB 1.6mm x 1.7mtr		4	Brake - Cables		
2	Nicola McIntyre	20842	$50 SINGLE SHOT (ESP		11 Sep 2012	Completed
2	Mr Ihaka Raumati	20868	Colombo Job/Quote		24 Sep 2012	Completed
88587	BBB Speedcage Black Anodised		1	Hydration - Cages		
1	Daniel Arrando	19813	Colombo Job/Quote		12 Dec 2011	Entered
81252	Beto/Pulse Baby Seat Rack 700c Disc		1	Carriers/Trailers/Bungees		
1	Daniel Arrando	19813	Colombo Job/Quote		12 Dec 2011	Entered

Job Reminders

Use this report to create a list of clients to be contacted (by text, email or phone) once a Job has reached a certain Step in the process or because you have set a Reminder flag on a particular job.

Texting is a separate Toniq module, contact one of our team for more information. Emailing is available to all users however some setup work may be required (refer to the Contact / Clients manual).

From the main menu select 6 Reports, 5 Job Reports, 3 Job Reminders. Press Enter to display a list of existing reports or press F3 Add to generate a new report. If this is not an existing report and you would like to reuse it, type a Name into the Name field.

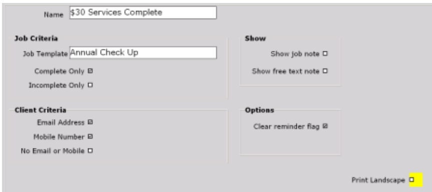
Under Job Criteria, press the spacebar to select the correct Template. You can tick Incomplete or Complete.

If you leave these blank it will find everyone with a Reminder flag set.

Tick Email and/or Text to find clients with an Email address and/or Mobile number on their record, or alternatively you can set the No Email/Text to get a list of customers you need to phone instead.

Tick the Clear Reminder to uncheck this option against the Customers job once the list is produced.

If you plan to print a list AND send a text, do NOT tick this option when you complete the FIRST task, but do tick it when you complete the SECOND task.

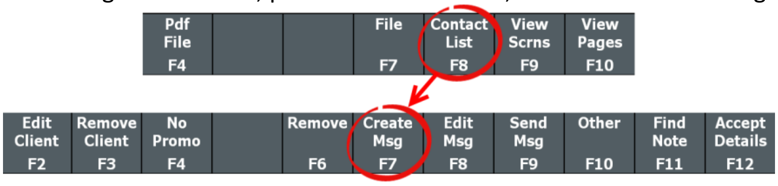


Print Landscape – tick to print report to your designated Landscape printer driver instead of Report printer. This must be assigned in Device Setup prior to printing.

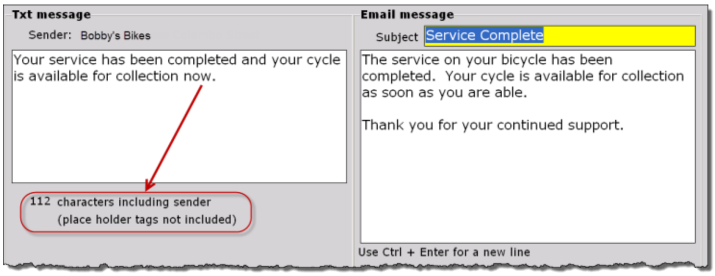
F12 to start the list generation.

If you want to print the list (THIS IS NORMALLY DONE AS TASK 1 WITHOUT THE CLEAR REMINDER FLAG SET) press F12 Print list now. You will then need to regenerate the list to send the messages, ticking the Clear Reminder flag during this second task.

If you are texting or emailing these clients, press **F8 Contacts List**, then F7 Create Message.



TXT messages: Limited to **160 characters**, including pharmacy name, so keep them brief and to the point. The number of characters already used is displayed under the message box.
Email messages: Always give your email a subject

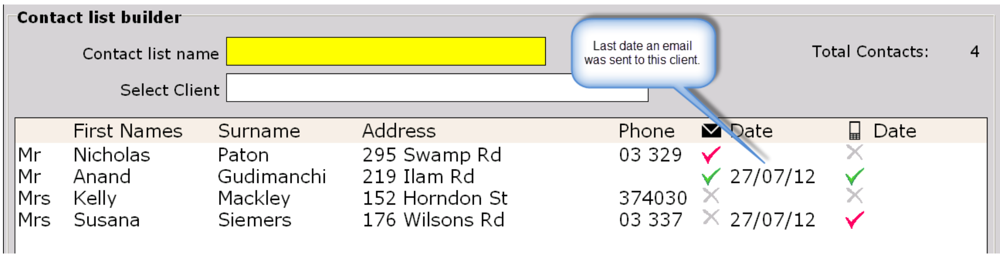


For more information about adding Attachments etc., please refer to the Contact / Clients manual.

You can create a text and email message at the same time. The option for how to send or which medium to send is determined at the Sending stage.

Once you have created your message (email, text or both) press F12 Accept Details

> ***NOTE:*** *A GREY CROSS indicates no details are recorded for this person (i.e. no email address or cell phone number are on file). A GREEN TICK indicates that details are on file - and person wishes to receive promotional info via that medium (email or TXT). A RED TICK indicates that details are on file - but person DOES NOT WANT to receive promotional info via that medium (email or TXT)*



Removing Clients: Remove any clients who do not want promotional messages, these will be showing red ticks. To remove these clients press F4 – No Promo, and then Y for Yes to remove all No Promotional clients from your list.

Depending on the medium you are using to send your information (text or email) you can also remove, in bulk, any Clients without an email address or text number available. To do this, press F6 Remove, and make the appropriate selection: 2 for Clients with no email address or 3 for Clients with no txt number.

Sending messages: **Once your list is correct, press F9 to send mail**. You will be prompted as to your Preference for Sending messages. Your options are Email only, Text only, Email else Txt (which means if you have created both types of message it will send to the Email address instead of Text) or Txt else Email (which means if you have created both types of message it will to send to the Text instead of Email)

When you send the message, you also get a confirmation email back, detailing the sender and who the message was sent to.

If you are printing the list, e.g. those customers who do NOT have email/text, press F12 Print

Job Reminders

Job Template: $30 Service

Customer	Job	Address	Telephone	Paid	Note	Free Note
Meegan Allan	$30 Service	Riccarton Road	3410195	To Pay		
Frodo Baggins	$30 Service	Strowan Road	3410196	To Pay		

Transaction Audit Reporting

Using the Transaction Audit report you have the option to view Job Only sales and/or to have the Job name (template name) displayed when you run the report.

> ***NOTE: This will only display Jobs that have been tendered as it is not until the tendering stage that the job actually becomes a Sales Transaction***

- 6 [Reports], 4 [Audit/Utility reports], 8 [Transaction Audit]
- Press Enter to display a list of existing reports *or* press F3 Add to generate a new report.
- Name the report if you want to keep it for future use.
- Select the date range that you want to review
- Press F11 to go to the second page.
- Under the Show category, you have the option to tick Show Job. This will show you the Job Template name along with the other transaction details.
- Under the Transaction type category, you have the option to tick Job sales only. This will filter all sales and show you ONLY Job sales (you can tick both criteria).
- Press F11 back to the first page. If you want to see ALL transaction details, remember to tick the Show Full Transaction box.
- Press F12 Accept Details to generate the report, then F10 to view or F12 to print.

Job	Description	Unit Price	Qty	Gross Price	Disc.	Net Price	
Invoice: 14983 (Iort Palsi Indostreos), 06/11/06 02:36 pm, Teller: A, Workstation: MEEGANS							
1 Standard	Item 5	$45.00	1	$45.00		$45.00	SF
1 Standard	BAG C/DALE FAST 78 BLACK	$30.00	1	$30.00		$30.00	
	Cash					$75.00	

(In the above example, Show Job, Job sales only and Show Full Transaction are all ticked)

Stock In Use

Along with the Job Stock Use report, Stock in Use can also be viewed in other parts of the program.

During POS Selling (provided Stock Info on POS is ticked under 7 Administration, 1 Setup, 8 General Options), any SOH in use will be displayed beside 'Jobs' at the bottom left of the POS selling screen when the product is entered.

SOH	**229**
PCode	**98782**
Jobs	**10**
EAN	

In the product stock card itself (in Maintain Products) the F4 Stock option will display Stock Use Jobs

Last sold	**22/11/07**	Stock on order	**0**
Last received	**200 21/6/07**	Last stocktake	**27/7/07**
Last invoice	**394545.01**	Stock use jobs	**10**
Cost	**Last 0.09; Prev Avg 0.1427**		

Also in the product stock card, from the first screen, press F10 Other then 8 View Current Jobs with Stock in Use. This will display details of each job with this particular item 'In Use', i.e. not tendered yet. You can move down the list of transactions and further details about the highlighted job will be displayed at the bottom of the screen.

GEAR OUTER CAP 5MM UNSEALED

Date	Job Type	Job Id	Staff	Qnt	Price	Due Date	Status
23/11/07	Normal	4789	tb	6	6.00	23/11/07	Completed
21/11/07	Normal	4772	tb	4	4.00	21/11/07	Completed

Customer: Miss Cathy Scott; W/S: WSHOP

Further sale items:
- Gear Cable Sram 1.1mm S/Steel $5.00
- Gear Outer Sram 5mm - per mtr $6.00
- BRAKE WIRE END CAP ALLOY $0.10
- Labour $100.00