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Category	Technical
Course	Location Setup
Version	1.0
Client	Generic
Software	2.14.100

Configure POS Quick Items

Quick Items are used at registers to display a list of products for quick selection; it's useful to products that are difficult to scan, or don't have a barcode.

Procedure to Add Quick Items

Hints and Tips

- ✓ If your store is Head Office managed, it's likely that quick items can only be configured on the HOS.
- ✓ A menu is usually only **copied** if a Head Office wants different buttons at certain stores, or a store wants a back-up.
 - You'll have to maintain both menus if there's buttons that apply to both menus.
- ✓ **You assign a menu to a store (or specific POS lane) in Location Setup -> Configure -> Item tab -> PLU tab.**
- ✓ The top levels within a quick item menu are the first buttons that display after the operator selects the **Quick Items** button.
 - Each sub-menu [+] is another level that products are grouped into, to avoid a long list of products on the screen.
- ✓ An sample menu structure:
 - Top menu: Dairy, Deli, Frozen, **Fruit A-K...**
 - If the operator selects **Fruit A-K**, more buttons display; these might be a mix of sub-menus ([+]) and actual products, such as [+] Apples, [+] Bananas, Beetroot each...
 - If they select the sub-menu [+] **Apples**, buttons for each apple product are displayed e.g. Fuji, Granny Smith...
- ✓ If a level has less than nine buttons, the system is usually set to display them down the side of the POS screen. A maximum of 42 buttons displays in full-screen (left to right); the user can press **More** to see the rest within the level.

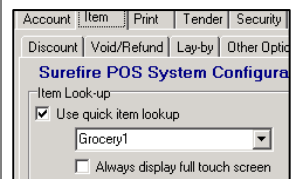
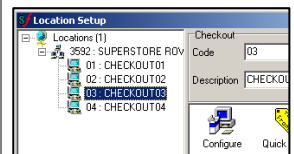
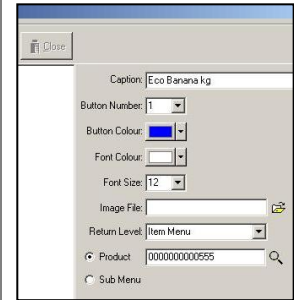
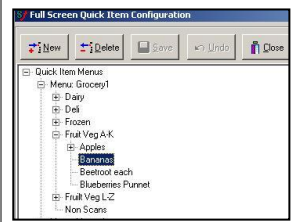
1.	From the HOS/BOS System menu, select Location Setup .	
2.	If a Head Office user, select Locations . <i>*Quick Items are created globally; to have store specific items, copy a menu (step 5) and customise it, and then assign that menu to the store (step 7).*</i>	
3.	Double-click the Quick Items icon. <i>*Any existing menus are displayed on the left.*</i>	
4.	To: add a new menu level then: go to step 5. To: add quick item products then: go to step 6.	
5.	Complete the following steps to create a new level: a. To: create another menu then: click Quick Items Menu . To: copy an entire menu or add a sub-menu (such as Fruit, Bakery...) then: click the menu you want to copy or add to (e.g. Menu: Grocery 1). <i>*The menu is expanded.*</i> Click [+] if you want to add the sub-menu within this lower level.	
	b. Click	
	c. If the system prompts 'Do you want to create items based on the selected menu': - Select No to create an empty sub-menu. - Select Yes to copy all the buttons in the selected menu into a new duplicate menu.	
	d. Type the Caption of the sub-menu.	
	e. If required, change the default Button Colour, Font Colour, and Font Size .	
	f. If required, add an Image File . <i>*Refer to Procedure to Add Quick Item Images on page 3.*</i>	
	g. Select Sub Menu .	
	h. Click Save . <i>*The new menu is added to the list; use your mouse to click & drag it up/down the list then click Save.*</i>	

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Hints and Tips

- ✓ The **Return Level** selected determines what screen the operator returns to after adding a quick item product to the transaction:
 - **Item Menu:** displays the Item Menu screen. The operator needs to re-select the Quick Item button if there are more products to add.
 - **Current Menu:** leaves the operator in the sub-menu that the product belongs to. E.g. if Fuji apples belongs to **sub-menu Apples**, after selecting Fuji apples the screen stays in the Apples list. The Operator presses **Back** to move up the Quick Item levels and to return to the Item Menu screen.
 Note: **Current menu** only works in version 2.14.0.0 or greater.
- ✓ If a product has multiple EANs with the same **Pack** and **Size** (KG, Each, 200g etc) dimensions, you can link any of them to the quick item button (so long as they're on the same stock record).
- ✓ If you're a Head Officer user, quick items are transmitted to the store/s when **HOS Export** and **HOS Import** are next run.
- ✓ Quick items are sent down to the registers when **File Transfer** and **POS Import** next runs (usually every few minutes).
- ✓ If you make change to quick items during trade, the POS operators will need to log off and back on to see them.

6. Complete the following steps to add quick item buttons:
- a. Select the Menu level that you want to add the product to.
 Click [+] if you want to add the product within this lower level.
 - b. Click
 - c. Type the **Caption** of the product.
 - d. The **Button Number** defaults to next in the list; you can overtype it if you want to insert this product between two other buttons.
 Skip a number to leave a blank gap between two buttons on the POS screen.
 Once the button is saved, you can also click and drag the product up/down to the required position in the list.
 - e. Select the **Button Colour** and **Font Colour** if you want to colour code buttons.
 - f. Select an **Image File** if required.
 Refer to Procedure to Add Quick Item Images on page 3.
 - g. Select the required **Return Level**.
 - h. Select **Product**.
 - i. Type or search for the EAN of the product.
 You can't enter the stock code.
 If there are multiple EANs for the product, select the one with the correct UPP (size).
 - j. Click .
 The product button is added to the sub-menu.
- 7.
- | To: | then: |
|---|--|
| add a sub-menu | return to step 5. |
| add a product | return to step 6. |
| edit or delete quick item buttons | refer to Procedure to Edit and Delete Quick Items on page 4. |
| change the menu assigned to a store or POS checkout | whilst still in Location Setup, select the applicable store or POS checkout.
Click Configure .
Click the Item -> PLU tab.
Select the applicable menu.
Click .
The lane must be rebooted to see the new menu. |
| finish | click .
If you made the changes during trade, ask the POS operators to log off/on. |



Using images against quick item buttons makes it quicker for an operator to identify the required button.

Hints and Tips

- ✓ Images can only be used if your POS registers are enabled for touch screen.
- ✓ You can add images to any quick item button; from a sub-menu level to the product level.
- ✓ You can't apply the same filename to more than one quick item level/product button.
- ✓ Images are only visible at POS if there are nine or more buttons on the screen; any fewer than this lists the buttons as text down the right side of the screen.
- ✓ A suggested website to download grocery, liquor, and fresh produce images is <http://www.dlibrary.com.au>.
 - Registration is free.
 - The average size of a low resolution image is 30KB.
- ✓ Images must be:
 - 4MB or less
 - Saved as a .JPEG or .BMP
 - Saved in a folder on the D:\ drive. It's recommended that you create a folder called **Quick Item Images** or similar.
- ✓ To **delete an image** against a quick item, highlight the filename and press **Delete** on the keyboard.
 - Don't press **Delete** on the screen; this will delete the quick item record!



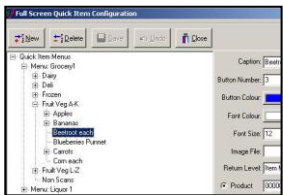

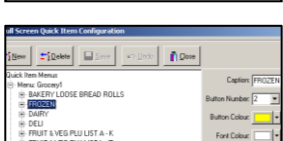

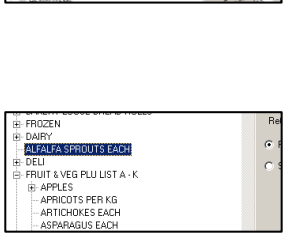
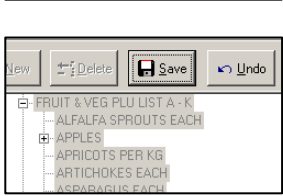
Procedure to Add Quick Item Images

1.	Source and save the required image/s. <i>*See Hints and Tips.*</i>
2.	In the Quick Item screen, click [+] to expand the menu to the required level or product that you want to add the image against.
3.	In the Image File field click
4.	In the Look In: field, select DataVol1 (D:) .
5.	Double-click the Quick Item Images folder (or similarly named).
6.	To view the files as pictures, click the View Menu icon and select Thumbnails .
7.	Click the required image.
8.	Click Open . <i>*The Image File field on the Quick Item screen displays the file added.*</i>
9.	Click Save once finished with the item.

Hints and Tips

- ✓ Before you **delete a quick item** level, triple-check you've selected the right one – there's no 'undo' option, except to call SUREfire Retail Support.
- ✓ If you're a Head Officer user, quick items are transmitted to the store/s when **HOS Export** and **HOS Import** are next run.
- ✓ Quick items are sent down to the registers when **File Transfer** and **POS Import** next run (usually every few minutes).
- ✓ If you make change to quick items during trade, the POS operators will need to log off and back on to see them.

Procedure to Edit and Delete Quick Items

<p>1. From the HOS/BOS System menu, select Location Setup.</p>	
<p>2. If a Head Office user, select the Location that you want to define. <i>*You'll be defining the Quick Item menu for all stores at and below the level that you select.*</i></p>	
<p>3. Double-click the Quick Items icon. <i>*The existing menus are displayed on the left.*</i></p>	
<p>4. To: delete a menu or product <i>be careful if deleting a sub-menu, as all sub-menus and/or products within it will also be deleted</i></p> <p>then: expand and highlight the sub-menu/product that you want to delete. Click Delete. Select Delete and Re-number to fill the gap, or Delete Only so that a blank space displays at POS where the button used to be.</p> <p>click and drag the button into its new position. <i>*Moving it down the list inserts it below the button you highlight; moving it up the list inserts it above the button you highlight.*</i> Click Save. <i>*The number position of the button is updated.*</i></p>	  
<p>move a product or sub-menu into a different sub-menu</p> <p>expand the menu that you want to move the product/sub-menu into (expand it to product level). Click and drag the product or sub-menu into its new position. <i>*The number position of its new position is updated, however a gap is left where you moved it from.*</i> <i>*In the example, alfalfa has been moved into the Fruit and Veg A-K sub-menu.*</i> Click Save.</p>	 
<p>5. Click Close.</p>	