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|----------|----------------|
| Category | Technical      |
| Course   | Location Setup |
| Version  | 1.1            |
| Client   | Generic        |
| Software | 2.18.5         |

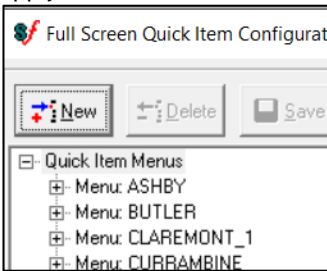
# Configure POS Quick Items

Quick Items are used at registers to display a list of products for quick selection; it's useful to products that are too bulky 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.

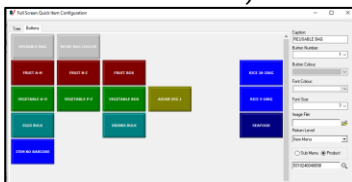


- ✓ You assign a menu to a store (or specific POS lane) in **Location Setup -> Configure -> Item tab -> PLU tab**.

|   |  |
|---|--|
| <p>1. From the HOS/BOS <b>System</b> menu, select <b>Location Setup</b>.</p>  |  |
| <p>2. If a Head Office user, select <b>Locations</b>.<br/> <i>*Quick Items are always created at the top level; to have a store specific menu, copy a menu, customise it, and then assign that menu to the store.*</i></p>  |  |
| <p>3. Double-click the <b>Quick Items</b> icon.<br/> <i>*Any existing menus are displayed on the left.*</i></p>   |  |
| <p>4. <b>To:</b> Copy an entire menu<br/>                 Add a new blank menu<br/>                 add a new sub-menu i.e. Fruit, Bakery, Apples<br/>                 add quick item products</p> <p><b>then:</b> Go to step 5.<br/>                 go to step 6.<br/>                 go to step 7.<br/>                 go to step 8.</p>   |  |
| <p>5. Complete the following steps to copy an entire menu:</p> <ol style="list-style-type: none"> <li>a. In <b>Tree</b> mode, click to expand <b>Quick Item Menus</b>.</li> <li>b. Click the top <b>Menu: xxx</b> level that you want to copy i.e. Menu:POS General.</li> <li>c. Click <b>New</b>.</li> <li>d. Click <b>Yes</b> to the prompt 'Do you want to create items based on the selected menu'.</li> <li>e. Type the <b>Caption</b> for this duplicate menu.</li> <li>f. Click <b>Save</b>.</li> </ol> <p><i>*The new Menu is added to the list.*</i></p> |  |

**Hints and Tips**

- ✓ The top sub-menus 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.
  - You can add items outside of a sub-menu, which is useful for top-selling items such as reusable bags.
- ✓ 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 (6 across and 7 down); the user can press **More** to see the rest within the level.
- ✓ Use **Buttons** mode to preview how your quick item menu will show at POS. You can also edit the buttons in this mode, and change their position.
  - All edits are done via the side bar, and you save them on **Tree** view; the ability to directly edit inside the layout and save in Button view will be in a future release).



6. Complete the following steps to add a new blank menu.
  - a. In **Tree** mode, click **Quick Item Menus**.
  - a. Click **New**.
  - b. Type the **Caption** of the menu.
  - c. If required, change the default **Button Colour**, **Font Colour**, and **Font Size**.
  - d. Click **Save**.

*\*The new menu is added to the list.\**
  
7. Complete the following steps to create a new sub-menu inside an existing menu:
  - a. In **Tree** mode, use the [+] to expand the menu to the level you want to insert into.
 

*\*i.e. the screen sample. you would click Menu: POS General to add a sub-menu for Bakery, or click Fruit A-M to add a sub-menu for Apples inside this level.\**
  - b. Click **New**.
  - c. Click **No** if the system prompts ‘Do you want to create items based on the selected menu’.
 

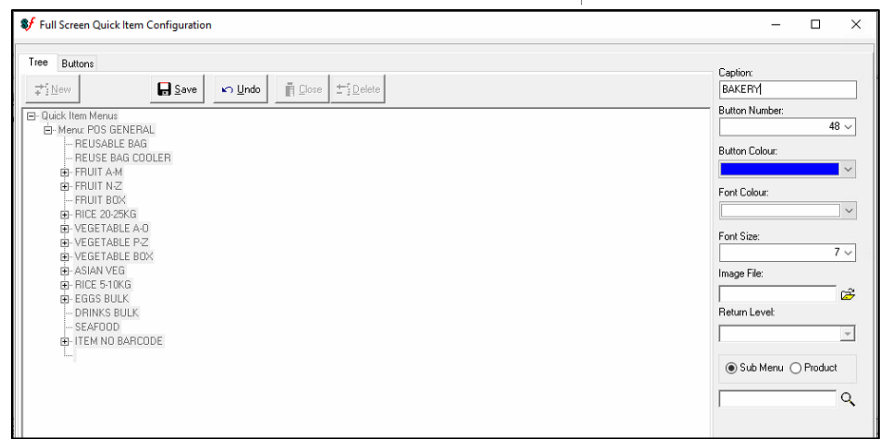
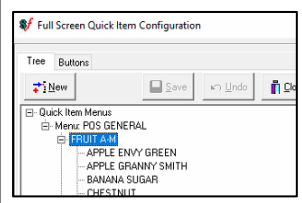
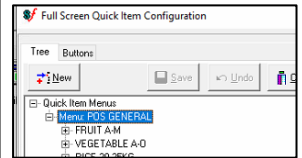
*\*A blank row inserts where your sub-menu will be added, in the next available position.\**
  - d. Type the **Caption** of the sub-menu.
  - e. If required, change the default **Button Colour**, **Font Colour**, and **Font Size**.
  - f. If required, add an **Image File**.
 

*\*Refer to Procedure to Add Quick Item Images on page 4.\**
  - g. Click **Save**.

*\*The new sub-menu is added; if required, click and drag it up/down the list then click **Save**.\**

*\*You must add one product level button to the sub-menu, to enable the option to ‘move’ existing product buttons into this new sub-menu.\**

*\*Click the **Buttons** tab to preview the layout; it shows the buttons only for the level that you clicked – i.e. click on a product level button inside a sub-menu, if you want to preview that sub-menu.\**



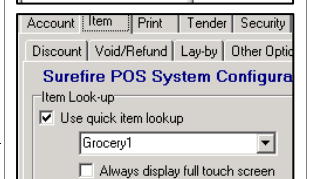
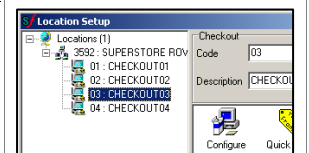
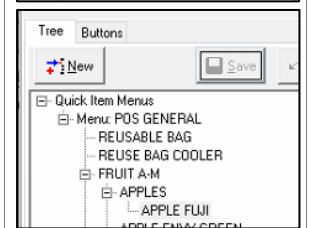
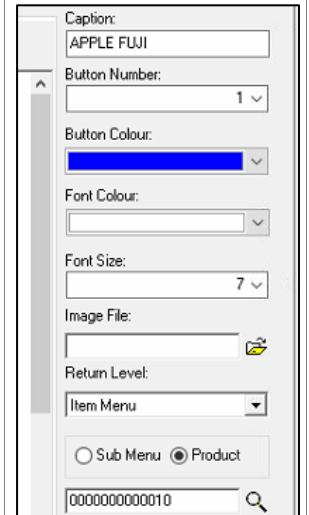
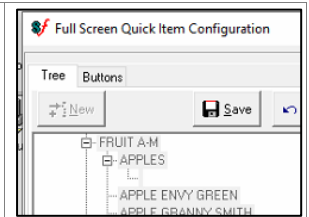
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**Hints and Tips**

- ✓ 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.
- ✓ 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.

8. Complete the following steps to add quick item product level buttons:
- a. In **Tree** mode, click the [+] to expand the menu to the level you want to insert into.
  - b. Click **New**.  
\*A blank row inserts where your product will be added, in the next available number.\*
  - c. Type the **Caption** of the product.
  - d. You can set **Button Number** to any available number.  
\*To leave a blank gap between two buttons on the POS screen, skip one or several numbers.\*
  - 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 4.\*
  - 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 **Save**.  
\*The button is added; if required, click and drag it up/down the list, then click **Save**.\*

|    |  |  |
|----|--|--|
| 9. | <b>To:</b>                                       | <b>then:</b>   |
|    | add a sub-menu                                   | return to step 7.  |
|    | add a product                                    | return to step 8.  |
|    | Preview the menu                                 | Click the level to preview.<br>Click the <b>Buttons</b> tab.<br>*i.e. click Apples to preview the Fruit A-M sub-menu.*<br>Edit as required. Return to the <b>Tree</b> tab to <b>Save</b> .   |
|    | edit or delete quick item buttons                | refer to Procedure to Edit and Delete Quick Items on page 5.   |
|    | set the menu assigned to a store or POS checkout | in Location Setup, select the Store or POS checkout.<br>Click <b>Configure</b> .<br>Click the <b>Item -&gt; PLU</b> tab.<br>Select the applicable menu.<br>Click <b>Save</b> .<br>*The lane must be rebooted to see the new menu.* |
|    | finish   | click <b>Close</b> .<br>*The POS operator must log off/on to see the changes.*   |



**Hints and Tips**

- ✓ Images are only visible at POS if touch screen is enabled (in **POS Config -> System -> System**).
  - ✓ If **Always Display Full Touch Screen** isn't enabled in POS Config (Item tab), images won't display if there are less than 9 products showing (listed down the side of the screen instead).
  - ✓ Once a full screen of products includes at least one image, the maximum number of products displayed per screen is 24.
  - ✓ You can add images to any quick item button level.
  - ✓ Images display best if you select a white **button colour**, as they often have a white background.
- 
- ✓ You can't apply the same filename to more than one quick item level/product button.
  - ✓ 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. If you're adding images via a HOS, images will be included in the export file (they don't need to be saved to the BPOS computer).
  - ✓ To **delete an image** against a quick item, highlight the filename and press **Delete** on the keyboard.
    - Don't click **Delete** on the screen; this will delete the quick item record!

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

**Procedure to Add Quick Item Images**

|    |   |  |
|----|---|--|
| 1. | Source and save the required image/s.<br><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 <b>Image File</b> field click  |  |
| 4. | In the <b>Look In:</b> field, select <b>DataVol1 (D:)</b> .   |  |
| 5. | Double-click the <b>Quick Item Images</b> folder (or similarly named).  |  |
| 6. | To view the files as pictures, click the <b>View Menu</b> icon and select <b>Thumbnails</b> .                                   |  |
| 7. | Click the required image.   |  |
| 8. | Click <b>Open</b> .<br><i>*The Image File field on the Quick Item screen displays the file added.*</i>                          |  |
| 9. | Click <b>Save</b> 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**

|    |   |  |
|----|---|--|
| 1. | From the HOS/BOS <b>System</b> menu, select <b>Location Setup</b> .   |  |
| 2. | If a Head Office user, select the Location that you want to define.<br><i>*You'll be defining the Quick Item menu for all stores at and below the level that you select.*</i>   |  |
| 3. | Double-click the <b>Quick Items</b> icon.<br><i>*The existing menus are displayed on the left.*</i>   |  |
| 4. | <p><b>To:</b> delete a menu or product<br/><i>be careful if deleting a sub-menu, as all sub-menus and/or products within it will also be deleted</i></p> <p><b>then:</b> expand and highlight the sub-menu/product that you want to delete.<br/>Click <b>Delete</b>.<br/>Select <b>Delete and Re-number</b> to fill the gap, or <b>Delete Only</b> so that a blank space displays at POS where the button used to be.</p>   |  |
|    | <p>to move a product or sub-menu higher or lower in the menu list</p> <p>click and drag the button into its new position.<br/><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 and automatically numbers the items afterwards if that position was in use.*</i><br/>Click <b>Save</b>.</p>  |  |
|    | <p>move a product or sub-menu into a different sub-menu</p> <p>expand the menu to the level that you want to move the product/sub-menu into.<br/><i>*You must manually add one button inside the sub-menu, before you can move into it.*</i><br/>Click and drag the button onto the button that it will be inserted above.<br/><i>*A gap gets left where you moved the button from.*</i><br/><i>*E.g. Apple Envy Green has been moved into the FRUIT A-M   Apples sub-menu.*</i><br/>Click <b>Save</b>.</p> |  |
| 5. | Click <b>Close</b> .  |  |