CLERK MANAGEMENT

Table of Contents

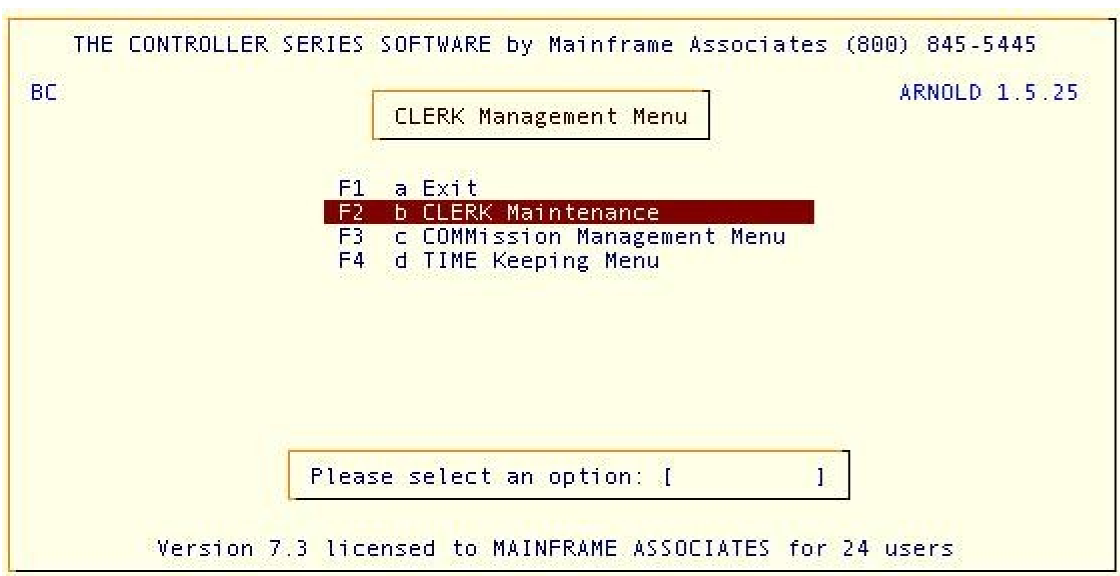
Clerk Management Overview

The Clerk Management option of ***The Controller Series*** system provides access to the staff database required in areas such as point of sale, receiving and purchasing.

A clerk number identifies each staff member who uses ***The Controller Series*** to the system. After clerk numbers are assigned, the system manager will determine each clerk's authorizations. Controlling each clerk's authority level ensures a manageable level of security. For example, the system manager may restrict a junior clerk to prevent him from adjusting inventory costs or adding items to inventory. Finally, to protect their privacy, the system manager may want to restrict employee data to management staff only.

After clerk numbers and authorizations are established, reports may be produced listing each clerk's authorization level. Before a user may sell at the point of sale, purchase or receive goods, they must be identified to the system. ***The Controller Series*** enables this identification through the assignment of clerk numbers.

The **Clerk Management Menu** is located at plate letters **BC** or vocabulary reference **CLERK**. All clerk related maintenance may be performed from the clerk management menu. The various options are covered in this section.



Clerk Management Menu, BC or CLERK

Clerk Numbers

Clerk numbers are used specifically at the point of sale, for back office accounting functions, or for producing various management reports. The clerk numbers used at Point-of-Sale must be entered before using the Point-of-Sale programs.

Clerk Maintenance Screen

Plate Letters: **BCB**

To access the Clerk Maintenance Screen, type **BCB** or from the Clerk Management Menu press **F2**. Enter the information in each field as prompted. After all of the information has been entered press F10 to save.

Clerk Maintenance Screen, BCB

Passcode: This is a security feature to prevent unauthorized users from tampering with clerk information. Enter a valid passcode here.

The System Manager will determine his or her clerk number and a code word first. Thereafter, accessing this screen will require a passcode. The passcode is a combination of a user number and the associated code word, in the format 12ABCD. For example, if the System Manager's code word is KRED, and his clerk number is 33, the valid passcode to use is 33KRED.

Clerk Number: This is the key field for creating each employee number and is a two-character field (letters or numbers). Enter the number 2 as 02. If the entry is a new clerk record the system will confirm the entry as a new employee number.

1) First Name: Enter the name by which the employee prefers to be addressed. This is the name that will print on sales receipts at Point-of-Sale.

2) Surname: Enter the employee's last name.

3) Street: Enter the employee's street address.

4) City: Enter the city in which the employee resides. Flag #228 sets the default area code, city and province name for the system.

5) Prov: Enter the two-character province in which the employee resides. A lookup is provided. Flag #228 gives the default value for this field.

6) Postal Code/ZIP: Canadian: Enter the corresponding 6-digit alpha/numeric postal code, separating its two halves by a space. US: enter the 5- or 9-digit ZIP code.

7) Telephone: Enter the employee’s 7-digit phone number. Flag #228 gives the default area code for this field.

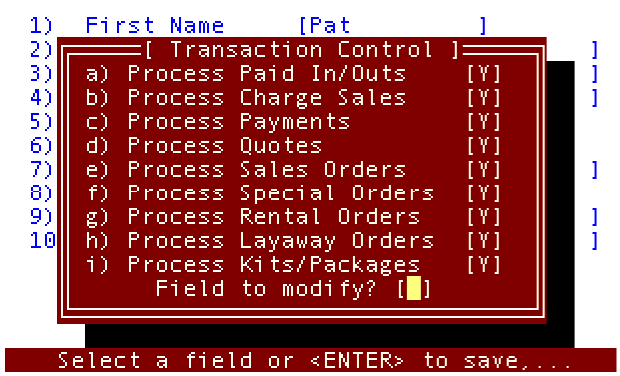
8) SIN / SSN: Enter the employee’s social insurance (in Canada) or social security (in the USA) number. The default is 000-000-000.

9) Next of Kin: Enter the employee’s next of kin. The default is UNKNOWN.

10) NOK Telephone: Enter the next of kin's telephone number.

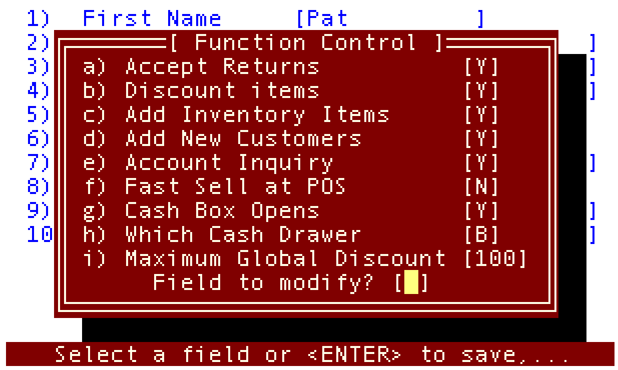
Clerk Authorization Levels

Clerk Authorization levels are accessed from the Staff File screen. A passcode and clerk number will need to be entered before these options are available.



BCB, F5 Transaction Control Options

F5 - Transactions: This option allows you to select which types of transactions the clerk will be able to process. There is a field for each type of transaction, each accepting Y or N. Due to system licensing, not all of these transaction types will be available at all sites.



BCB, F6 Function Control Options

F6 - Point of Sale: This option allows you to select which functions are available to the clerk at the Point of Sale. Most fields accept Y or N. Field **h)** requires a cash drawer number or B for both. Field **i)** requires a numeric discount percentage (between 0 and 100). Do not include the decimal.

BCB, F7 Security Control Options

F7 - Security: This option allows you to set other security privileges.

Note: Field **b** is the only field that contains a number. The acceptable values are 0-4. The highest authorization available, 4, is normally assigned to the System Manager, business owner and Floor Managers. This is the security level for overriding a credit denial and for allowing a customer to charge a purchase to an account. It corresponds to field 1 on page 5 of the CUSMAS screen.

Clerk Reports

It is recommended that the user print each Authorization as it is created and maintain the copies in a binder for reference (**BCB**). As a new employee becomes more familiar with inventory and pricing, the manager may wish to delegate more authority.

It is also recommended that new staff should be limited to Fast Sell in the POS until they are familiar with internal procedures. This option is under **F6** at field **f.**

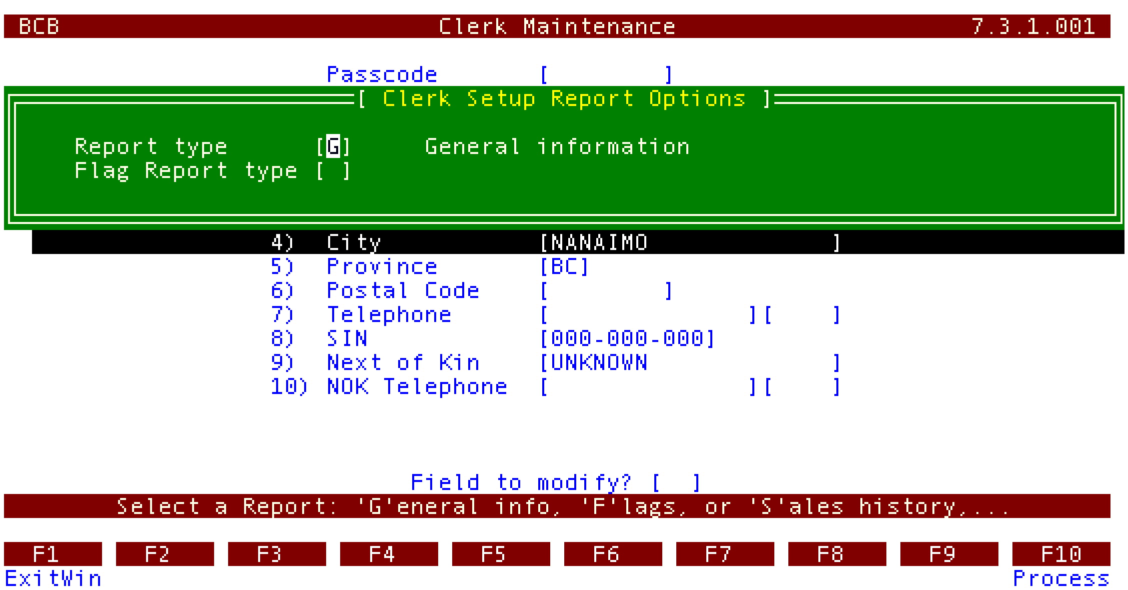
More than one person should be assigned Y at **F7** field **h**, Access Employee Data, to avoid a lockout if the senior manager is away from the business or on holidays.

F8 – Reports This options produces one of three clerk reports. After the passcode is entered, it is available from either the clerk # entry field or from the modify prompt.

General information: This option produces an address book listing from the Staff data entry file. It provides a clerk name (given and surname), clerk number, address, city, postal code and telephone number. This report may also be accessed from **BFGL.**

Flag Settings: This option produces one of three reports showing the current standing of clerk authorizations. Reports can be selected for POS, Security, or Transaction.

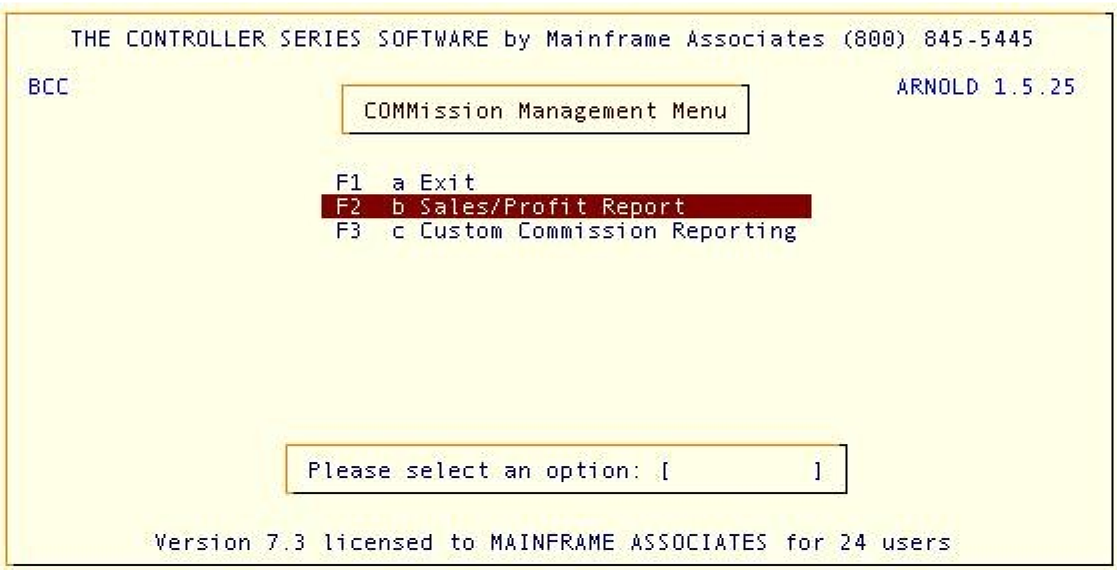
Clerk Sales History Summary: This report breaks down sales by clerk, with summaries for month-to-date and year-to-date.



BCB, F8 Report Options,

Commission Management Menu

The Commission Management Menu is where you will track commissions. Commission can be setup by clerk, by item, by customer, or user-customized ways. Use this menu to print or view commission reports. This menu is located at plate letters **BCC** or use vocabulary reference **COMM**.



Commission Management Menu, BCC or COMM

Commission Setup & Reporting

How commissions are calculated depends on the setting of flags 26, 246, 248, 349, 370, 371, 401, and 402. Currently, there are four independent methods of calculating commissions. A short summary of these methods is given below - for more details, please see Bulletin 24: Commissions In ***The Retail Controller***.

Commission Method 1

Flag 26 = Y, F246 = Salesrep or Clerk, F248 = Profit or Cost, F349 = N, and Flag 399 is to read "STAFF.CMD386.COMMIS". Commissions are calculated for the clerk or the customer salesrep at EOD, based on the profit or cost of the sale, for different price levels. Setup, viewing, and reports are accessible from BCCC - Custom Commission Reporting.

Commission Method 2

Flag 26 = N, flag 349 = Y1 or Y2. Commissions are paid based on a single commission rate as specified for the clerk for that customer on page 4 of the CUSMAS screen. If set to Y1, commission is based on the sale price, if Y2, it is based on the profit of the sale. Two reports for this calculation method are available when flag 399 has been set to "STAFF.CMD386.VELCAN": Both reports rely on the Customer be setup as an Open Item Customer.

Commission Method 3

The fourth method of calculation commissions is based on the customer being setup as an Open Item customer. The commission is calculated on PROFIT. The salesrep and commission percentage is assigned in the Customer Manager program on page 4. Flag 399 will contain "STAFF.CMD386.COMMRPT1". The report allows the user to "include payment detail" or not.

Commission Method 4

The fifth commission calculation option is based on a dollar range matrix for Gross margin calculation or markup for Net Sales. Flag 399 would contain the program name of "STAFF.CMD386.COMMEFST". The matrix has some defaults but can be modified by selecting F5 option.

Commission Method 5

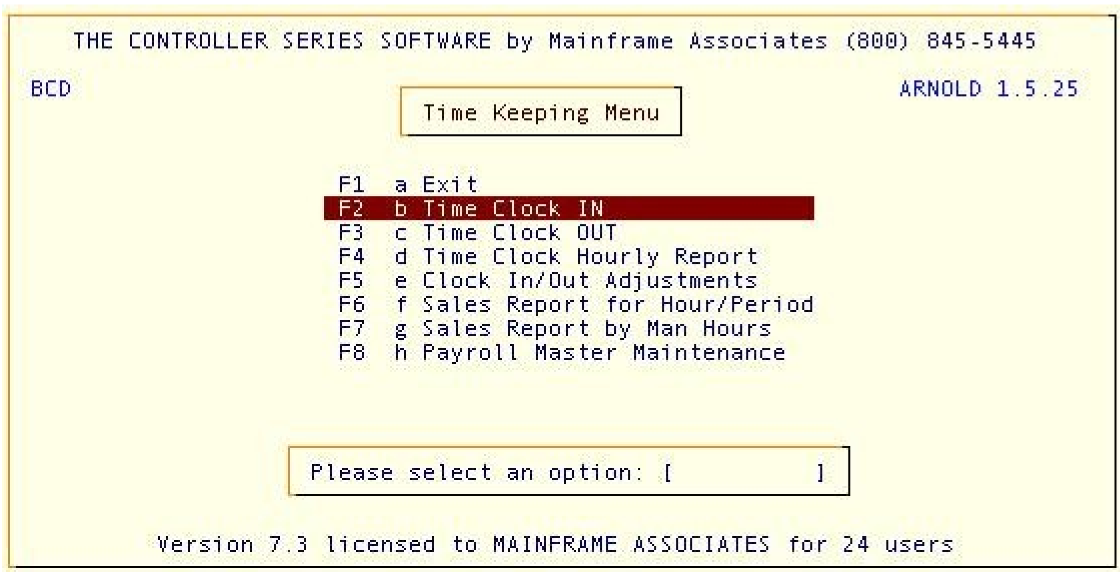
Essentially, this is however the user wishes commissions to be calculated. The report for the custom commission calculation method would be set in Flag 399 and found at **BCCH** - Custom Commission Reporting.

Commission Reports

There are a variety of commission reports that are available with ***The Controller Series*** software, depending on the commissions determination method chosen, as described above. There is also a generic sales report for the manual calculation of commissions. It is located at **BCCB** - Sales Report by Clerk/Rep. It lists all sales for the period specified, sorted by clerk and by departrment. The net sale, COGS, profit, and margin are displayed, in summary or in detail. Other specialized commission reports are available by setting Flag 399 to the desired report.

Time Keeping

This menu, located at **BCD** or menu shortcut TIMEK, is intended to track employees hours at work. The Time Keeping Menu lists all the available options. The most frequently used ones are discussed in this section: Time Clock In, Time Clock Out, Time Clock Hourly Report, Sales Report for Hour/Period, and Sales Report for Man Hours.



Time Keeping Menu, BCD

Time Clock Entries

The most frequently used Time Clock Entry options are located at plate letters **BCDB** and **BCDC**. These are the two screens your employees are most likely to use to clock-in first thing in the morning, after break, or lunch and clock-out to either go on break, to lunch, or home for the day.

Time Clock In

Plate Letters: **BCDB**

Vocabulary Reference: **IN**

Employee #: Enter the employee number to 'Clock In'. Note: this is **not** the clerk number. After pressing ↵, a message will appear saying 'Employee *Employee Number*

	logged in, press any key to exit'. If this clerk is already logged in, a message saying 'You have not signed out. Please sign out.'.
Date:	This field displays the current day
Started:	When the employee 'Clocks In', this field will display the current time, which will be used as the start time
Ended:	This field will display the current time when the employee uses the 'Clock Out' function.

Time Clock Out

Plate Letters: **BCDC**

Vocabulary Reference: **OUT**

This entry screen is the same as above. The only difference is that when you enter the employee number, the employee will be considered 'Clocked Out'. The Started and Ended fields will display the times that the employee logged in and logged out. The fields below will also display the following information.

Current Hours:	Displays the time logged between the employee's last log and log out.
Total For Day:	Displays the accumulated total time logged for the current day.
Total for Week:	Displays the accumulated total time logged for the current week.
Note:	An employee has to log in and log out before any time will display in the last three fields.

Time Clock In/Out Adjustments

Plate Letters: **BCDE**

This screen is identical to that of the Time Clock In or OUT screens, except that a manager passcode is required. This allows the manager to make corrections to employees' time clocking (for example, if they forgot to clock in or out).

Time Reports

The following three options provide reports for tracking employees' hours, sales per hour for a defined period, and sales by man-hours.

Time Clock Hourly Report

Plate Letters: **BCDD**

You will be prompted for the following information:

Branch #: Enter Branch # or asterisk (*) for all

Start Date: Enter Start Date

End Date: Enter End Date

Clerk #: Enter Clerk # or asterisk (*) for all

Press F10 to process

The report is sorted by Clerk Number and contains the following headings: Clerk #, Clerk Name, Date, Total # of In & Outs, Hours, and Modified. There is also a Grand Total for Hours at the end of the report.

Sales Report for Hour/Period

Plate Letters: **BCDF**

You will be prompted for the starting and ending dates, as well as the department range. This report shows the number of sales for specified departments per hour.

Sales Report by Man Hours

Plate Letters: **BCDG**

Enter same information as for Sales Report for Hour / Period. This report shows the sales for specified departments per hour.

Note: The previous two reports will contain sales for the current day only if EOD has been run. Flag 104 also needs to be changed to Y.