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## The Controller Series

#### Preface

**The Controller Series** is a complete business management system. It consists of inventory control, point-of-sale, labour management, accounting, and other functions in a completely integrated fashion. It is designed to streamline merchandising activities by providing precise inventory control and accurate transaction reporting. It eliminates manual computation of daily sales reports, tedious manual inventory updating, inefficient forms and helps reduce pilferage.

**The Controller Series** improves profits by reducing lost sales; reducing holding cost of inventory; reducing staff time to complete sales and reducing interest charges for funds borrowed to support inventory investment and receivables. In addition, it improves efficiency in purchasing, reduces time spent on customer accounting and may eliminate the annual stock take.

Among other uses, it is designed to handle all normal cash register and inventory control functions for all types of retail store processing including invoices, under-stock reporting, tracking of inventory movements, receiving goods, pricing, credit checking, stock availability, business analysis reporting and counter-person control.

#### The Purpose of this Manual

The purchase of a Point of Sale / Inventory Control management software system is a major step for any business. *The Controller Series* system comprises more than 2500 menu options, and provides functionality in Staff Management, Purchasing and Receiving, Inventory Management, Accounts Receivable, Point-of-Sale and System functions.

With the adoption of any new system, a business can expect to undergo normal periods of flux as staff integrates the new processes with established routines. This also applies to **The Controller Series** system. The best way to reduce the stress of adopting a new system is through rigorous employee training.

Mainframe strongly recommends a commitment to training over the system's first year in use. The daily presence of well-trained staff, familiar with various aspects of a computerized inventory management system, reduces the questions presented by junior or part-time staff. As front-counter workers, they are directly subjected to the pressures of time and customers' inquiries about items in inventory, status of their account, upcoming sale dates, etc. The more familiar they are with the system, the more efficient they will become.



### Theory of Operation

**The Controller Series** is a real time system as opposed to a batch system. This means all critical data management is done at the time the transaction takes place. As a result, the information displayed on the many management screens is current.

For example if a customer purchases goods on credit in the morning, reducing their available credit and returns in the afternoon for additional purchases, their available credit will be reduced by the morning transaction. Similarly, an item may be sold repeatedly at several terminals (especially during sale times) but the current quantity on hand (QOH) will always be calculated by the system as based on the most recent transaction.

If two clerks call up the same inventory record, the system ensures one clerk will wait for the record to come free. If the system appears to pause (hang) for a moment, the session is probably waiting for another clerk to release the record. This does not occur at the point of sale. The system is designed to minimize this occurrence but inventory or customer account records should not be displayed on the screen for any longer than is necessary, during a record look-up.

The system eliminates the need for cash registers. "Dumb" terminals replace these. There is usually a reduction in errors due to the added visual feedback. The system will check code letters or numbers such as those assigned to inventory items or charge customers. If incorrect information is input, the screen will display an error message such as NOT ON FILE. Correct the data with the Backspace key or refer to the screen-bottom to prompt for any look-up features.

**The Controller Series** uses a software device called a print spooler to control the printers on the system. When a report, invoice or other point-of-sale transaction is sent to the printer it travels to the print spooler first. This feature allows more than one user to share the same printer and speeds the time required for the terminal to be set for another transaction. The main exception is cash printers, which may be attached privately for the exclusive use of one terminal. Printers attached to a Windows PC may also be used as output targets, when setup on an integrated local area network.

#### Features

- Full record and file locking allows many users (including many store branches) to share data files without fear of duplication or redundancy of information.
- Immediate update of inventory and customer data from point-of-sale, receiving and accounting.
- Self-explanatory data entry screens with clear, easy-to-read prompts.
- Function key driven menu system with a sophisticated user command vocabulary for experienced user
- Lookup functions to preview detailed data reports at all major input fields such as customer number, supplier number and inventory identification number.



- Single screen point-of-sale which makes novice computer users comfortable and able to sell within minutes.
- Automatic selection of correct printer for cash or charge sales.
- Ability to have separate counter areas each with their own number of terminals with either shared or individual printers.
- All reports may be viewed on-screen, printed, or saved to disk for historical purposes.
- Automatic overnight daily processing routines, including full data backup.
- Automatic overnight monthly processing routines.

### System Requirements

**The Controller Series** Version 7.3 uses the THEOS Corona Version 5.0 operating system. Minimum system requirements depend on the current level of the software, the O/S, customer requirements, and are subject to change. Mainframe Associates will assess the needs of the individual customer and recommend a system for them.

## System Access

**The Controller Series** programs are protected by the THEOS account security system. To use the system, the users must first logon to a legitimate account and provide an account password. The system is configured with the following account names; REG1, SYSMAN, SYSTEM, POS, REPAIR, SPOOLFIX, AUTOO, AUTO2 ONEFIX, ONEFIX2 and TRAIN. These accounts are defined following:

- **REG1:** A REG account is usually assigned for each front-counter or service station, and is used to access the point-of-sale portion of the system.
- **SYSMAN:** Provides access to various operating system functions. It is used primarily for global system management more than the application software.
- **SYSTEM:** Synonymous (same ID) as SYSMAN; takes the user to the operating system prompt on the public account ID.
- **POS:** Similar to the REG1 account; allows the user to the operating system level in the private user-account ID.
- **REPAIR:** Special account used only when an emergency boot disk is required to boot the system.
- **SPOOLFIX:** Used when option V from the Spooler Management option is called; executes an automatic rebuild of the spooler and SHOULD NOT BE USED BY ITSELF FROM THE LOGON PROMPT.
- **AUTO0:** The system logs into this account each time it boots up after which a special program (exec) carries out system configuration functions.



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- **AUTO2:** Similar to AUTO0 except that it carries out system configurations on the private user-account ID, which contains the data files.
- **ONEFIX:** During the early-morning auto routine when the system boots into single-user mode, it uses this account to carry out system setup and maintenance functions.
- **ONEFIX2:** Similar to ONEFIX except that it carries out system configurations on the private user-account ID.
- **TRAIN:** Training account installed on the user's system with fabricated business data; user can become familiar with the system by completing a function on the TRAIN account before affecting the function with the business' live data.

The REG series of accounts are restricted to selling goods and may not have passwords. Remaining accounts require a password.

In addition to the standard accounts above, the system may also be configured to designate account names for the individual staff.

Mainframe Associates' Client Support line is available Monday to Friday from 7:00 AM to 5:00 PM (Pacific Time) excluding statutory holidays. Call (800) 845-5445 for assistance. After hours emergency support is available by dialing this number. Emergencies are generally defined as 'being unable to sell'. Non-emergency after hours calls will be billed.

### Common Terminology

Break - Q:	The Break–Q sequence is best used only as a last resort when it appears that something has completely locked the user's session. Using Break-Q will stop the task, and usually exit the user completely out of the program that is running and back to the menu. The correct order for the sequence is to press the Break key (on the top right of most keyboards, often also labeled as "Pause"), release it, and then press "Q". Note: this will be ineffective in some programs, like Point-of-Sale.
	Important Note: The use of BREAK-Q and related key sequences are strongly discouraged as important data files can be corrupted. System Managers are advised to turn off the BREAK sequences to ensure data file integrity.
Command Line:	The "Please select an option" box at the bottom of a data entry screen that is used to file the entry, change a field, move to the next record, print the screen or exit the program.
Carriage Return:	The "Enter" or "Return" key on the keyboard. Also shown as $\hdots$ in the manual.
COGS:	Cost of Goods Sold
CSI:	The term refers to the Command String Interpreter of the THEOS operating system. It is represented by the greater than sign (>). If the



cursor is at this position, type the word LOGOFF and press  $\downarrow$ . If the user reaches this by typing CSI on the menu, the typing m and pressing  $\downarrow$  will return the user to the menu.

- **Cursor:** The blinking light on the screen that indicates where the next entry will start.
- Default: Refers to the data the system enters at any field when the user presses ↓ without entering data into one of the screen fields. Wherever possible, default entries have been assigned to make data entry more efficient.
- **Data Entry Field:** Refers to a specific area of the screen where data is input. An alpha or numeric character prefixes the fields that can be edited.
- **Function Keys:** A group of keys located along the top of the keyboard. They are designated for special functions such as exiting the program, repeating previous entries or calling new programs from the menu system.
- **EOD/EOM/EOY:** End of Day/Month/Year generally denoting a process to be done at the time interval specified.
- Hot Key: The Controller Series supports multi-sessioning both at the main console and at all terminals on the system. Multi-sessioning may be described as a window behind another window for up to eight windows on a terminal or 12 windows on the main console. Switching between these sessions is done via a "hot-key" or "session-key." If a terminal has been set up with multiple sessions, the session number will appear to the lower right corner of the user's screen. To "hot key" between sessions, press the **PAUSE** key followed by the function key of the session to switch to. For example, to switch to session two, press PAUSE and then F2. Do NOT press both keys simultaneously.
- **Logoff:** This refers to the process of quitting from a program and exiting the user's account.
- Menu: A list of choices displayed on the terminal from which the user selects the task or function to perform.
- **Modem:** The piece of equipment that allows a terminal to use a telephone line to access a remote computer system. In order to use the modem, the terminal must issue commands that the modem recognizes. For the Hayes compatible modems, all commands begin with the capital letters AT followed often by D for dial and then the number. For high-speed internet connections, the use of the modem is completely invisible to the user.

POS: Point-of-Sale

**Prompt Line:** The display at the bottom of the screen that indicates what information the user may enter at the designated field.

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QOH:	The abbreviation used for Quantity on Hand. One of the quantities stored in <i>The Controller Series</i> , along with QOO (Quantity on Order) and COMM (Committed Quantity).
Screen:	Refers to the data entry form, which is painted on the terminal by the computer system. This form will usually stay the same while a series of data entries are being performed.
Scroll:	To search through files in sequence usually by using the up/down (1) arrow keys.
Terminal:	Any keyboard/screen combination that provides access to the THEOS server and <i>The Controller Series</i> software. The terminal may or may not be a computer itself.
UOM:	The abbreviation used for Unit of Measure. Up to four UOMs can be used in <i>The Controller Series.</i>
Window:	A second smaller screen that opens temporarily in a portion of a main screen for the user to lookup or input data.

## Data Entry Procedures

The data entry programs subscribe to certain procedural standards, which make *The Controller Series* easy to use. These are described as follows:

When the cursor is at the Modify field the following options are available:

- Modify: To modify a field in the data entry screen, enter the alphanumeric character preceding the field and press ↓. This moves the cursor to that field for editing purposes. Press ↓ to accept the changes and the cursor will return back to the modify field.
- Save: To save changes in the data, press the  $\downarrow$  key while the cursor is in the Modify field.
- **Exit:** To exit without saving the changes to the data, press **F1**.

**Delete:** To delete the current record, press **F4**.

Each data entry screen will have any number of different options relating to that screen. The options are listed at the bottom of the screen either above or below the function keys. If the option is listed below the function key just press the function key to activate the option. If the option is listed above the function key, press Shift + the function key to activate the option.



### The Menu System

The menu system provides access to all of the features of *The Controller Series* system and is designed to be consistent, easy-to-use and flexible. Some of the standards applied throughout the menu system are described as follows:

Plate Letter:	Each menu or program has an assigned identification code (plate reference letter(s) or option). This plate option, displayed in the <b>upper left corner of a menu</b> , is a quick way of moving to the user's selected menu or data entry screen. By typing the option letter(s) at the <i>Please select an option</i> prompt and pressing , the appropriate program is called. This is one of the ways the user can move around in the menu system.
On-line Help:	An on-line Help message is displayed in a window at most menus by entering '?' and pressing the appropriate function key for that option.
Options:	Each menu lists options preceded by a function key. To call an option, press the related function key. Many of the options begin with capital letters similar to the menu name. The user can also call that option by entering the capital letters that are also referred to as vocabulary references.
Security:	The system manager or senior operator can assign privilege levels or passwords to any of the options displayed. The first is the password that will be needed to access the option, if no password is needed, press I. The second is the privilege level. The system compares the account privilege level to the menu privilege level. If the account privilege is less than the option privilege level, access is denied.
Selection Box:	When the cursor is in the <i>Please select an option</i> field, the system is ready for the user to select an option or call one of the menu system features described above.
Vocabulary Reference:	A vocabulary reference or capital letter code is a command. There are menu options throughout the system that have all or part of their description in capital letters (i.e. MOVEment Menu). The user can enter the capital letters in a prompt field from any menu in the system to move to a different menu. These capital- letter codes are also called vocabulary references. Entering vocabulary reference codes is often faster than pressing a series of function keys.



#### Moving Around the Menu System

The user can move around the menu system in three ways:

- **Press the function key** at the top of the keyboard, which corresponds to the appropriate function.
- **Type the plate letter(s)** of the function at the 'Please select an option' field at the bottom of any menu screen. These are the letters appearing in front of the section headings in the Table of Contents.
- **Type a Vocabulary reference** at the 'Please select an option' field at the bottom of any menu screen. These can be found in brackets at the end of the section headings of the manual. They can also be found as capitalized letters as explained in the section above in The Menu System section. There are vocabulary commands for all of the major functions of the system as well as many of the minor ones.

#### The Management Menu

The Management Menu (vocabulary reference TOP) is the highest level of the menu system and provides access to other business management programs as well as *The Controller Series*. Much of the software referred to on this menu is highly specialized and optional.



#### Management Menu, TOP

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#### The Retail Controller Menu

This menu provides access to the major section of **The Controller Series.** By pressing the appropriate function key, the cursor moves to the menu for that section. Each part of **The Controller Series** has its own chapter in the User Reference Manual.

3	Controller Series Menu	ARNOLD 1.5.25
	F1 a Exit to Management Menu F2 b INVentory Management Menu	
	F3 c CLERK Management Menu	
	F4 d POS - Point of Sale Menu	
	F5 e RECeiving Order Menu	
	F6 f Controller UTILities Menu	
	F/ g Inird Party Accounting Menu	
	F9 i AR - Accounts Rec Menu	
	F10 j PURchasing Management Menu	
	Please select an option: [ ]	

#### Retail Controller Menu, B

The other options available in each data entry screen will be described in more detail in the documentation relating to each screen.