

# Module 1 – An Introduction to Your Pilot POS Training Programme

## Overview

By purchasing the Pilot POS System, you have gained access to a point-of-sale management system that has the flexibility to provide a stable, fast and user-friendly “front-of-house” management system that can integrate into an efficient and effective “back-office” system. The Pilot POS system provides you with the tools and knowledge to help you make decisions that ensures the growth of your business.

Your Pilot POS System has been designed to make sure that the system and financial management needs of business owners in the hospitality industry are addressed efficiently and effectively.

## The communication and learning objectives for this module:

This module is made up of the following main sections:

- Introduction to the Pilot POS System
- Reviewing Your Pilot POS System Documentation
- Important Features and Benefits of the Pilot POS System
- Contacting Pilot Software.

## Introduction to the Pilot POS System

With retail and point-of-sale technology and information being updated almost daily, and with the financial and management demands that any business needs to face in the modern world, it is now more necessary than ever to keep up to speed and to make use of business tools that help you focus on what you do best – making sure your customers are being looked after. The Pilot POS System is the system tool your business needs to make managing all the activities and details associated with the hospitality industry easier, more reliable and more streamlined.

The Pilot POS System provides a system that offers tools and information to control stock, staff and customer's bills with ease. It is now easier to focus on the finer details of the business – your stock and your customers – safe in the knowledge that stock and supplier information, financial data and business processes are up to date and thoroughly integrated.

### A business tool that is easy to use and reliable

Your Pilot POS System has its foundations in an application that has a track record of more than 18 years in South Africa and is regarded as one of the leading food and beverage management software systems available. It is a system that caters for the unique needs of the hospitality industry, providing a stable, fast and user-friendly front of house management system, which integrates to a highly regarded back office system to provide a total solution to effectively control a growing business and increase profits.

The interface and workflow of the Pilot POS System has been designed to help you access and use program functions intuitively and logically. A comprehensive selection of features and functions are available to ensure that you manage your stock, suppliers, business processes and financial information with confidence. There has been an extensive development process that has focussed on incorporating reporting functions and features that offers hospitality management a system that is complete and uncomplicated.

Numerous program enhancements and much improved functionality have been developed to provide a robust, reliable and fast system that operates on platforms such as Microsoft Windows, XP, and Small Business Server 2003. Businesses that need multiple users working on a Point-of-Sale system can be assured of a program that operates with minimal fuss and maximum efficiency.

### A business tool that streamlines your workflow

The Pilot POS System has been designed to help minimise the time spent on managing administrative and payment issues. Comprehensive stock records are updated automatically as you process orders and issue stock which increases your ability to manage supplier accounts, control stock and monitor income. Bookkeepers and financial managers can take advantage of the fact that the Pilot POS System can integrate financial and accounting information with recognised accounting packages, such as Pastel Accounting.

## Reviewing Your Pilot POS System Documentation

The Pilot POS User documentation has been designed to focus on the needs of specific user groups and ensures that information is communicated appropriately. The product documentation is typically batched into separate, user specific modules:

1. Pilot POS for the Business Owner
2. Employee Pilot POS Training Brochure
3. Interactive Training Material for Supervisors and Managers
4. Interactive Training Material for Site Operators

### 1. Pilot POS for the Business Owner

## Pilot POS System



### 2. Employee Pilot POS Training Brochure

Pilot Software - Module 3 - Touch Point of Sale for Employees

**Opening the table**

1. Access Pilot Touch POS by tapping your card or using the Finger Print Scanner.
2. Enter the table number using the number pad.
3. Enter the number of people.
4. Touch Yes to confirm that you are starting a new table.

**Ordering Items**

1. When the items screen is changed please to select the item you want to order for the customer.
2. Confirm which category of the menu you want to order from.
3. Touch the item and then touch Enter to add the item to the table.
4. When you have completed one set of items, touch the Order button to confirm the order.

pilot  
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### 3. Interactive Training Material for Supervisors and Managers

Warning: BETA version

POS

**POS Menu**

- WATER CASHUP
- STOCK POS
- CASH PAYOUT
- OPEN TABLES
- IOU / LOAN
- CLIENT PAYMENT
- POS CASHUP
- LOGON
- SALES (X)
- EXIT

Cash Draw, Print L, Exit, Manager Menu, Floor Plan, Logon, Admin, Delivery

TRAINING/POS6 TRD: 09 Jun 2012 09:21 License expiry: 19 Jul 2012 Version: 100-3-0Y LK POS Connected: 88D8M0 (PilotDE)

### 4. Interactive Training Material for Site Operators

**Managing Stock Purchases**

When daily stock is purchased (which ensures that the business's stock levels are appropriate) systematic and diligent routines around recording all incoming stock and expenses are vital to the effective control of stock flow through the system. The details of daily purchase invoices need to be captured correctly for the sake of financial reporting, as well as knowing the state of stock within your system. As an invoice is captured, a number of things occur:

- The systems stock holding levels are increased
- Unit prices for the purchased good are updated.

**Recording Purchase Information**

Use the following steps as a guideline to tracking and recording purchase information.

1. Access the Pilot Admin program:
  - Admin
2. Select the Purchases menu option to view the available functionality:
  - Day Entry
  - Batch
  - Reports
  - Transactions

**Recording Daily Purchases**

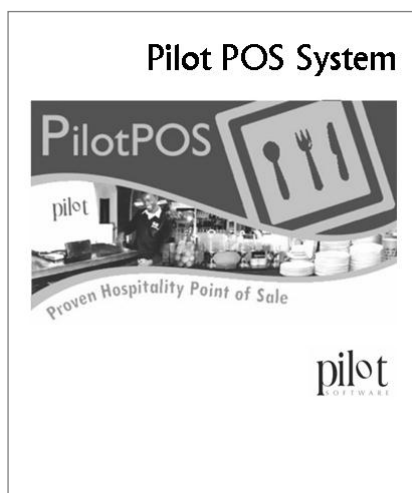
3. You can use either the Purchase, Day Entry menu option, or the Purchases button to open the Daily Purchases window.
4. To record details of a new invoice, click on the New button to display the Select Supplier window.
5. Type the suppliers name whose invoice information that you want to capture into the search block. When the correct supplier is highlighted, click on OK.

Use this functionality for creating invoices and supplier templates.

DAILY PURCHASES 141000009

Select Supplier

## 1. Pilot POS for the Business Owner

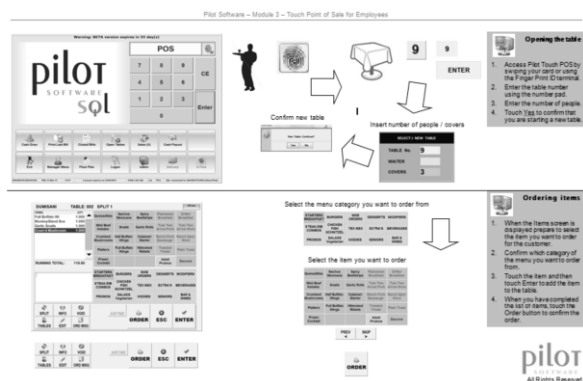


This user material introduces the business owner to the main features and functions of the Pilot POS system and essentially lays out what the program could do for the business. Detailed information relating to the tasks and procedures for Supervisors, Managers and Site Operators are documented in separate modules.

It is recommended that Business Owners work through the following modules that are designed to give a basic overview of the functional areas of the system:

- Module 1 – An Introduction to Your Pilot POS Training Programme
- Module 2 – A Bird's Eye View of Your Pilot POS System
- Module 9 – Working with Weekly / Monthly Routines
- Module 10 – Working with Reports

## 2. Employee Pilot POS Training Brochure

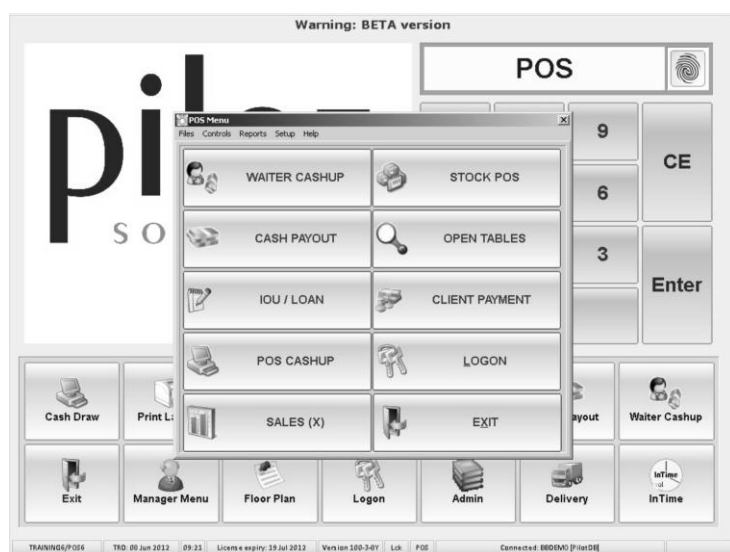


The Pilot POS System for employees has been designed to be intuitive and easy to use, and the training of tasks and procedures for this user group is uncomplicated and will take employees minimal time to work through.

The content for Point-of-Sale staff or waitrons is made up of:

- Module 3 – The Pilot Touch Point-Of-Sale for Employees and Waitrons

## 3. Interactive Training Material for Supervisors and Managers



The Pilot POS System for Supervisors and Managers starts to take a formal training approach. Employees or learners who need to work through this material need to know more than marketing features and benefits, and not only need to comprehend the responsibilities of “front-office” staff, but also need to be aware of the tasks and procedures that they need to perform on the system.

The content for Supervisors and Managers is made up of:

- Module 1 – An Introduction to Your Pilot POS Training Programme
- Module 2 – A Bird's Eye View of Your Pilot System
- Module 3 – The Pilot Touch Point-Of-Sale for Employees and Waitrons
- Module 4 – The Pilot POS System for Supervisors and Managers
- Module 8 – Using Pilot POS Daily Routines to Manage the Business

## 4. Interactive Training Material for Site Operators

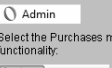
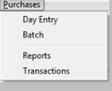

**Managing Stock Purchases**

When daily stock is purchased (which ensures that the business's stock levels are appropriate) systematic and diligent routines around recording all incoming stock and expenses are vital to the effective control of stock flow through the system. The details of daily purchase invoices need to be captured correctly for the sake of financial reporting, as well as knowing the state of stock within your system. As an invoice is captured, a number of things occur:

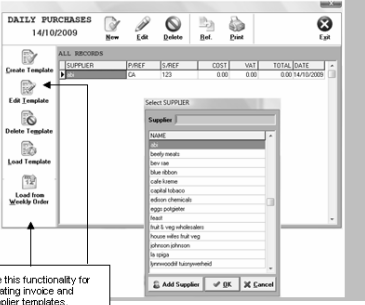
- The systems stock holding levels are increased
- Unit prices for the purchased good are updated.

**Recording Purchase Information**

Use the following steps as a guideline to tracking and recording purchase information:

1. Access the Pilot Admin program:  

2. Select the Purchases menu option to view the available functionality:  

3. You can use either the Purchase .Day Entry menu option, or the Purchases button to open the Daily Purchases window:  

4. To record details of a new invoice, click on the New button to display the Select Supplier window.
5. Type the suppliers name whose invoice information that you want to capture into the search block. When the correct supplier is highlighted, click on OK.

**Think and Do!**



Use this functionality for creating invoice and supplier templates.

It is the Site Operator that essentially manages the business as well as the information being entered into the POS system, and they need to be familiar with all functionality and processes within the system.

The material for this user group has been designed to give a comprehensive overview of the functions, tasks and tools that are typically used to oversee and maintain the information that is being entered into the system.

The content for Site Operators is made up of:

- Module 1 – An Introduction to Your Pilot POS Training Programme
- Module 2 – A Bird's Eye View of Your Pilot System
- Module 3 – The Pilot Touch Point-Of-Sale for Employees and Waitrons
- Module 4 – The Pilot POS System for Supervisors and Managers
- Module 5 – Using the Admin System to Manage Information
- Module 6 – Managing Pilot POS Software and Hardware
- Module 7 – Using Touch Design to Customise the Look and Feel of Your System
- Module 8 – Using Pilot POS Daily Routines to Manage the Business
- Module 9 – Working with Weekly / Monthly Routines
- Module 10 – Working with Reports
- Module 11 – Technical Troubleshooting for Restaurant Managers

## Important Features and Benefits of the Pilot POS System

Pilot Software's Point-of-Sale and Administration software is the complete solution, designed by experience for the hospitality industry. Developed in South Africa, Pilot Point-of-Sale is the complete answer to hospitality operations large or small, behind the scenes or in the front shop. The Pilot POS System ensures that the management of restaurant and hospitality businesses, which are traditionally cumbersome and tiresome, is now within the reach of virtually any person entering the industry.

The Pilot POS System is a hospitality management system with a wide range of tools and functions that will undoubtedly increase the effectiveness of your business. We would like to highlight a few of the main features and benefits that you will encounter as you begin to work with Pilot:

- Solutions for any operation, small or large. Pilot POS is configurable and upgradeable from a small over the counter take-away, to a 400-seater owner operated or franchise restaurant, to multi-station, multi-cost centre hotel restaurants.
- Runs on Microsoft Windows 2000, XP and Windows 7.
- An intuitive and logical interface that is uncomplicated and becomes more recognisable as you spend time with the application.
- Supports a large range of POS peripherals such as printers, cash drawers, and swipe card and finger readers.
- Fully integrated tools so that both your POS (front-of-house) and Administration (back of house) functions operate smoothly.
- Pilot POS is easy to use with visual prompting through simple, uncluttered graphics.
- Pilot POS keeps abreast of the latest technological developments.
- Extensive reporting features have been designed to give accurate and thorough stock and department information so that you can access the necessary management information of your business.
- Keeping supplier information updated is quick and easy.
- Integrated stock control features that ensure you always have a thorough knowledge of your stock, be it information about individual packaging and price details, stock levels, expiry dates or how much stock is being issued.
- Incorporates Internet to your operation to keep your finger on the pulse.
- Financial systems and data that is compatible with Pastel Accounting.
- Additional tools and modules can be added to the system at any stage.
- Pilot's telephonic and web support is available to you 24 / 7 / 365.
- Pilot Software's comprehensive solution is locally developed in South Africa.
- International footprint includes the United Kingdom, Australia, Mozambique, Namibia, Botswana, Zimbabwe, Zambia, Kenya, Nigeria and Mauritius.

## Contacting Pilot Software

Do not hesitate to contact your designated dealer or Pilot Software Holdings directly.



### Administration and Support

Feel free to contact us should you have additional administration or information requirements. Log into Pilot's system via the internet. Open a support call, check on the status of repairs, or view your account statement. Absolutely FREE, and only from Pilot at [www.pilot.co.za](http://www.pilot.co.za) using your customer login details.

You can use the following details to contact the support team:

Tel: 08610-PILOT (08610-74568)

Fax: +27 11 656-2516

Email: [web@pilot.co.za](mailto:web@pilot.co.za)

Calls from outside South Africa:

Tel: +27 11 602 8300

Email: [web@pilot.co.za](mailto:web@pilot.co.za)



### Training

Pilot has designed and developed training material and user documentation according to National Qualification Framework principles that will speed up the learning of the system and increase your understanding of what the system can do for your business. Contact your dealer or Pilot directly for more information about attending training courses.

Use the numbers above to request additional training if necessary.



### Pilot Software Holdings' Homepage

Pilot Software's homepage has been set up to help you stay in touch with company and industry information.

[www.pilot.co.za](http://www.pilot.co.za)