

Module 5 – Using the Admin System to Manage Information

Overview

The main objective of this module is to communicate to Site Operators the importance of maintaining and managing information on the Pilot POS System. Quite simply, when it comes to information on a system – Garbage In – Garbage Out. By keeping good databases of information, you ensure that reporting is accurate and does not contain obsolete or unnecessary information.


The learning objectives for this module:

By the end of this module, you will be able to:

- Perform the tasks and functions to add, edit and delete employees and supervisors on the Pilot POS system.
- Perform the tasks and functions to add, edit and delete supplier information on the Pilot POS system.
- Review the tasks and procedures relating to the addition, editing and maintenance of your System Files.
- Perform the tasks and procedures to manage the Prep Sheet.
- Practice the procedures and routines to add, edit and manage the Bulk Sheet.
- Practice the procedures and routines to add, edit and manage the Master File.
- Practice the procedures and routines to add, edit and manage PLU items.
- Practice the tasks and procedures to combine two items on the system (work with Master and PLU Items).
- Practice routines and procedures to link PLU items with Prep Sheet items.
- Perform the tasks and procedures to set up Set Menu items.
- Recognise important business principles and processes related to the Costing of PLU Items and R/M Usage items.

Concepts and Principles Covered in this Training Module

This module is designed to cover the fundamental tasks and processes required to manage information through the Administrator system.

Setting Up User Groups on the System	<p>The Pilot POS User Access function allows you to add and modify user information on the system. It is within this functionality that you will create individual user PIN codes and group levels. The security set up of the Pilot POS System offers tight access control, which when used properly, offers complete data and system security. It is essential to any system that high level user passwords not be given to any other users. Security of your system should be one of the most important aspects of system maintenance.</p> <p>It is important to have a group which has access to all functions in the system. This group should only have a limited number of users within it, for example senior level management or owners. Group one should always have minimum access as this is the access level that the system uses to log on automatically.</p> <p>Important It is essential to manage the codes and PIN numbers of each user.</p> <p>The main task covered in this section is:</p> <ul style="list-style-type: none">• Assigning User Groups.
Adding, Editing and Managing Waiter Information	<p>The Waiters file contains all the information of your waitrons. This file is used to clear waitron PIN numbers and set their rate of commission. Any modifications made to this file, will be carried through to your front-of-house module automatically.</p> <p>The main tasks covered in this section are:</p> <ul style="list-style-type: none">• Adding, Editing and Deleting Waiter Information• Adding and Editing Supplier Information. <p> Warning – Fraud and Theft!</p> <p>Strictly manage the use and distribution of magnetic cards. Ensure that every employee must have their own magnetic card whenever they are on duty.</p> <p>If a staff member has left their card at home, we suggest they be issued with a new card.</p> <p>Supervisor and Manager cards must never be left lying around unattended. Supervisor and Managers must never allow any employee to use their card.</p>
Accessing the Security Log File	<p>The Security Log file stores all access information where functions with the log field set to yes is set. This report shows you who accessed each function, and at what date and the time.</p> <p>The main task covered in this section is:</p> <ul style="list-style-type: none">• Viewing and Printing the Security Log File.
Managing and Maintaining Your System Setup	<p>File maintenance forms an important part in maintaining a healthy information system. By keeping good databases of information, you ensure that reporting is accurate and does not contain obsolete or unnecessary information. There is a specific routine that you need to follow when modifying or adding items to your files.</p> <p>The main tasks covered in this section are:</p> <ul style="list-style-type: none">• Accessing the Pilot Admin System Files• Entering the Pilot POS Activation Key.

Managing and Maintaining Master File, Prep Sheet and Bulk Sheet Information

The Master File contains all the information relating to stock and expense items. Any item that is purchased or prepared on site needs to reside in the Master File. Any raw material items that need to be costed should also be added to the file. Pilot Software considers this file to be the central starting point of the system, so any file set up and maintenance tasks should always start here.

The main tasks covered in this section are:

- Reviewing Stock Concepts
- Understanding the Concept of Bulk Stock
- Understanding the Concept of Back Stock
- Understanding the Concept of Front Stock
- Recognising the Best Practice Process for Setting Up the Master File, Prep and Bulk Sheets
- Setting Up and Confirming Categories
- Adding New Categories
- Setting Up Master File Information
- Setting Order Levels
- Setting Up the Prep Sheet
- Sorting and Finding Items in the Prep Sheet File
- Understanding How Factors are used in Prep Sheet Setup
- Controlling Stock to Headings
- Understanding Usage per Thousand
- Using POS Control
- Setting Up Bulk Sheet Items
- Understanding the Yield Analysis on Bulk Sheet Setup
- Understanding Yield and the Bulk Costing Report.

Adding, Editing and Managing PLU (Price of Listed Unit) Items

The PLU (Price of Listed Unit) Items file contains all the information about items sold to customers. It is important to keep consistent standards when working with information in this file because not only do your customers see descriptive information from this file on their bills, this file also contains important information for sales reporting.

The main tasks covered in this section are:

- Understanding the Importance of PLU (Price of Listed Unit) Items
- Adding and Editing a PLU Item
- Using Points for Incentive Purposes
- Enabling and Activating Vouchers for PLU Items
- Allocating Print Destinations
- Setting Up PLU Departments or Cost Centres
- Linking PLU Items to Stock Items
- Linking a Prep Item to a PLU Item (using the PLU File)
- Linking a PLU Item to a Prep Item (using the Prep Sheet File)
- Printing PLU / Prep Link Information (using the Prep Sheet File)
- Confirming PLU Limits
- Setting Up Set Menu Items.

Editing and Managing the Costing of PLU Items

The Costing functionality of the Pilot POS System provides you with an additional control tool for your business. Costing tools enable you to compare actual stock usage figures with theoretical stock usage figures. As with all theoretical stock systems, you need to ensure that the information contained in your costing formulas are up to date and correct. If you make any changes to the set up of your system, you need to make the changes to your costing formulas too.

The main tasks covered in this section are:

- Understanding the Importance of PLU Costing
- Managing the Costing of a PLU Item
- Printing PLU Items Costing Information.

Managing Raw Material Costings

Raw Material Costing handles the costing of composite raw material items, that is, raw material items that are made up from more than a single component. This allows for cost price fluctuations of this raw material item when one or more of the component's prices fluctuate.

The main tasks covered in this section are:

- Managing the Costing of a Raw Material Item
- Printing the Costing Report.

Contacting Pilot Software for Training

Do not hesitate to contact your designated dealer or Pilot Software Holdings directly if you require effective training.



You can use the following details to contact the support team during office hours:

Tel: 08610-PILOT (08610-74568)

After hours

Phone 082 777 8280 between 01:00 and 06:00 for after-hours support.

Calls from outside South Africa:

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