Register Deployment Considerations

This document outlines some key considerations and questions to raise prior to a deployment of Register, answers to these questions will impact how you configure the merchant account and how you setup their products.

1. Contents

2. Retail & General

This section outlines the key considerations and questions to raise to retail merchants and all merchants in general.

2.1. Departments

Question - How would you like your department's setup?

There is no right or wrong way of setting up Departments, however it can impact how easy it is to find products. It is important to ask the merchant how they want their Departments setup, so it is familiar to the end user. Some retailers will want them setup to mirror their e-commerce website which is typically by product category, others may want it by manufacturer or supplier. Outside of retail merchants may want their departments to mirror their menu or services price list.

2.2. Products

Question – Approximately how many products do you have, and can you provide a list of your products in a spreadsheet?

Products can be setup individually or bulk imported on the Web Portal, in advance of the deployment it is worth asking the customer roughly how many products they have and is it possible for them to get them in an electronic format (preferably spreadsheet) to aid in the import process (you could also provide the latest import template from the Web Portal).

2.3. Manual Product

Question - Would you like some manual products setup?

If a merchant cannot provide a list of products, you can setup some products to act like a cash register and use manual products, when adding a manual product, the basket the system will prompt the user to enter a price. These are also known as 'dump codes' or 'open items', even if the merchant provides products for import, it is worth asking if they would also like any manual products created so they can still process sales for items that might not have been added.

2.4. Product Browser

Question - Which products would you like on the screen?

A product browser must be created in order to create a device, you can create an empty browser but is beneficial to find out from the customer which items need to be on the product browser. If a customer is unsure, it can be beneficial to place their manual products here for quick access.

You can also configure how the product browser is displayed; you also have the following options to consider which are purely personal preference:

- Grid View – displays products in a grid (default option), this allows for more products on the screen
- List View – displays products in a list, some find this a better view but does reduce the number of products displayed
- Display Product Images – by default this is turned on, if you do not have product images assigned, we suggest turning this off as it will allow for more products to be displayed. If it is possible to add images we highly suggest doing so as it will be easier for users to locate specific products.

If the merchant has multiple tills or stores, you might also want to ask if they want the same browser for each device or if they would like different product browsers created for different tills / locations.

2.5. Store Details

Question - Please can you provide details of the store(s)?

In order to create a store / location you must enter the name, a code if desired as well as the address details.

2.6. Staff Members

Question - Please could you provide a list of all the staff?

In order for the system to be used straight away, it is best practice to add at least one of the merchants staff members on the system in advance of the deployment, you will need to know their name, role (supervisor / user) and pin.

If you are using temp staff and do not want to record who is doing what, we would suggest only creating a standard user and supervisor user per store / location.

If you do want to track who is selling what (for commission and traceability) then you will need to create individual staff members and assign them to the appropriate stores / locations, this does provide the additional benefit of more detailed reporting.

2.7. Feature Permissions

Question – Are there any features you would like users to not have access too?

Feature permissions can be configured within the profile, it is quite common for merchants to request that refunds, price overrides and other functionality be set to supervisor approval or supervisor only. Some merchants will also want some features disabled entirely such as tipping or surcharges. Based on other deployments we recommend the following feature permissions be set:

Feature	Access
Percentage Discount	Supervisor Only
Price Discount	Supervisor Only
Cancel Sale	All POS Users
No Sale	All POS Users
Price Override	Supervisor Only
Refund	Supervisor Only
Manual Refunds	Supervisor Only
Void Item	All POS Users
Staff Can Delete Appointments	Disabled
Surcharge	Disabled
Tip	Disabled
Assign Staff To Transaction	Disabled
Access Custom URL	All POS Users
Access Paid In	Supervisor Only
Access Paid Out	Supervisor Only
Access Reports	Supervisor Only
Access Stock	All POS Users
Access Transaction History	Supervisor Only
Access Web Portal	Supervisor Only
Perform Start Day	Supervisor Only
Perform End Day	Supervisor Only

2.8. Default Receipt Behaviour

Question – Do you want receipts printed by default?

Typically, merchants want receipts by default. Always print receipts is configured by default, however the default receipt behavior can also be configured to optional receipt, this will still give you the ability to print the receipt at the end of a transaction but will not print by default speeding up the process.

2.9. Receipt Header & Footer

Question - What would you like at the top and bottom of the receipt?

The receipt header and footer can be customised with the merchants own messaging and details (text only). It is important to ask if there is any particular messaging the merchant would like here.

2.10. Automatically Update Data

Question – Would you like the tills to automatically sync their data?

We would suggest having this configuration set to Update on Start Day, this will set the tills to automatically Sync with the Web Portal at the start of each day (when entering the float).

2.11. Reasons

Question – Do you want to record reasons when carrying out certain functions?

You can configure Register to prompt for reasons on No Sale, Cancel Sale and Refunds. These reasons are then visible in the various Web Portal reports, turning these off speeds up the mentioned processes but provides less data.

2.12. Switch Clerk

Question – Do multiple staff members need to access the till simultaneously?

Switch Clerk allows users to temporarily suspend the current transaction and login as a different user, this is typically seen in bars and pubs or quick service establishments. If devices are being shared between staff members you will likely want this enabled, if each member of staff has their own device then we would suggest switching off this feature.

2.13. Blind Declaration

Question – Do you want your users to see if the till is up or down when cashing up?

By tuning this on it will hide the expected cash value in the till as well as if the till is up or down when cashing up, this configuration is largely focused on trust of users and if you would like them to see if the till is reporting a gain or loss before submitting the end of day.

2.14. Cashing Up Type

Question – How would you like to cash up your till?

Register can either prompt the user to cash enter total amount of cash or enter the counts for each denomination in the till. Cashing up by denomination is a slower process but is more accurate.

3. Hospitality

This section outlines the key considerations and questions to raise to merchants in the hospitality sector where they could be dealing with wet stock and order receipts.

3.1. Kitchen Printers

Question - Will you be using kitchen / order printers, if so, how many?

Printing order receipts is common in hospitality, Register Core users can print order receipts to either the main POS printer or 1 additional printer whereas Register Plus users can print to multiple additional receipt printers (bar, kitchen, dessert station etc). If only using one additional printer you will configure the order receipt at a product level and set the additional printer within the profile, if using multiple additional printers you will need to use Advanced Printing within profiles and setup product groups as well as the printers on the web portal.

3.2. Transaction References (Tables / Tabs)

Question - How would you like to identify transactions (for the kitchen and users) when suspending transactions or printing orders (to the kitchen)?

When suspending transactions in Register you must give the transaction a reference, this is set within profiles and can either be:

- Free Text
- Prefix Text (i.e. "Tab:" ________)
- List (must select a list created)
- Customer Name (selected from the CRM)
- Auto Generated Number (auto order numbers)

If the customer has tables, they will likely want a list of the tables, for quick service establishments they will likely want order numbers.

3.3. Department Setup

Question - How would you like your department's setup?

There is no right or wrong way of setting up Departments, however it can impact how easy it is to find products. It is important to ask the merchant how they want their Departments setup, so it is familiar to the end user. Most hospitality merchants will want their departments to mirror their menu or bar price list, for example:

- Drinks
  - Beer
  - Cider
  - Spirits
  - Mixers
  - Mixed Drinks
  - Cocktails
  - Softs
- Food
  - Bar Snacks
  - Starters
  - Mains
  - Desserts

If you are selling a large variety of drinks / food, you can also create sub departments for types of beer or spirits if required.

3.4. Other Lists (List Modifiers)

Question - Do you have any options for products that don't affect the price?

Some food items might modifiers that do not affect the price or stock levels, these could be anything from sauces to questions such as how they would like their meat cooked (Rare, Medium, Well etc). These modifiers will need to be created as lists, then you can apply the list modifier to the applicable products.

3.5. Managing Liquid Stock (Stock Containers)

Question - Do you want to record stock levels on your liquid or any containerised products?

If a merchant does not want to manage their stock levels for the wet product (i.e. drinks) they can setup their drinks as Regular products.

Most bars will want to manage their wet stock, to do this they will need to setup the products as Containers and Fixed Measures as this will show you how many pints or shots were sold. Some examples of this are below:

Selling Wine	Selling Beer	Selling Spirits
Container Red Wine (75cl Bottle)	Container Lager (25L Keg)	Container Gin (70cl Bottle)
Fixed Measure Small Red Wine (125ml)	Fixed Measure Half Pint Lager (284ml)	Fixed Measure Single Gin (25ml)
Fixed Measure Large Red Wine (175ml)	Fixed Measure Pint Lager (568ml)	Fixed Measure Double Gin (50ml)
Fixed Measure Bottle Red Wine (75cl)	Fixed Measure Jug Lager (1L)	

To do this you need to create a stock container (keg, bottle etc) for each drink, then create the fixed measures from that container which will be the actual products sold (i.e. pint, glass, shot).

3.6. Food Ingredients (Item / Price Modifiers)

Question - Do you have any products that form part of another product or have options for products that do affect the price or stock levels?

Some merchants will want to record the stock of components that make up a product, for example a cheeseburger would be made up of a bun, some cheese and the burger patty. To do this you first need to create products for each of the ingredients, then when you create the cheeseburger product you can add the ingredients as product modifiers. When adding product modifiers, you can configure the default, min and max quantities, if they are editable and if they affect the price.

The same process is applied for other price-based modifiers, i.e. extra onion rings, different sauces for your steak and so on.

Note, Item / Price Modifiers is only available to Register Plus users whereas List Modifiers is available to Register Core and Plus users.

3.7. Mixed Drinks & Cocktails (Item / Price Modifiers)

Question - Do you want to record stock levels of your mixers on mixed drinks?

For mixed drinks such as Gin & Mixer you have several options, how you do this largely depends on how you would like data recorded and how want the screen to show the products, there is no right or wrong approach and is largely driven with balancing data vs ease of use:

Option 1 – Single Products without Modifiers

Create individual products for a single gin & mixer and double gin & mixer. If you do not want to see the volume of product sold you could do this as normal products without leveraging the fixed measures above, in this scenario the reports will show the quantities of single and doubles and the revenue generated. The downside to this approach is it will not show which mixers are being used (unless you add them to the basket also), if this data is not relevant this approach is certainly feasible.

Option 2 – Single Products with Modifiers (mixed drink only)

Create individual products for a single gin & mixer and double gin & mixer as above with the addition of adding the modifier of the fixed measure (single or double) set to be included by default and non-editable. This will provide the same reports as above but will also provide the benefit of showing the volume sold i.e. 689 single gins which equates to 17,225 ml (17.2L) of Gin. The downside to this approach is it will not show which mixers are being used (unless you add them to the basket also), if this data is not relevant this approach is certainly feasible.

Option 3 – 1 Product with Modifiers for Size (mixed drinks only)

This is setup in a similar way to option one however you will only create a single product for Gin & mixer with a single fixed measure applied by default as a modifier but with the option of allowing this to be changed to a maximum of 2 (for a double) that also affects the price. This provides the same benefit of option 2 but will reduce the number of products shown on the screen as both a single and double are the same product, it's only the modifier you are changing so will involve 2 extra taps on the screen. The downside to this approach is having the extra taps within the workflow vs additional products on the screen.

Option 4 – 1 Product with Modifiers for Size and Mixer (mixed drinks only)

Similar to option 3 but with all the mixers available as modifiers, this will allow you to record which mixer is being used (Coke / Tonic / Lemonade) as well as the size of the drink (single / double) which has the same benefits in the data as option 3 but also the same disadvantage of additional taps (up to 3) when adding a product.

3.8. Price Lists

Question – Do you have more than one price list (such as Happy Hour or Eat In / Takeaway)?

If different bars will be selling products at different prices i.e. VIP bar is cheaper than main bars, you will want to create multiple price lists. This is also true if you will be offering set discounts during a specific time (Happy Hour) or have differing prices for eat in vs takeaway. Price Lists allow you to set different prices for products and assign those prices to specific stores, you also have the option to

3.9. 'Plus' Browser

Question - Do you want some specific departments listed on the screen or would you prefer specific products?

Register Plus users can leverage the 'Plus' browser, this allows you to configure specific departments to be listed in the product browser. This is typically used in hospitality to mimic the layout of a menu.

3.10. Automatic End Day

Question – Do you operate past midnight?

If the bars are closing before midnight we would advise turning this on and setting the time to 23:59:59, this will prevent sales being processed after midnight, if a till has not been cashed up on the previous night it will force the user to cash up before it can be used. If you are operating past midnight you will want to turn this feature off.

3.11. Customer Relationship Manager (CRM)

Question – Will you be using the Register CRM tools for managing customers and/or appointments?

If the merchant will be using the CRM you will need to check and configure the following items

3.11.1. Other Lists (CRM)

Question - Do you have any options you wish to record in the CRM such as appointment type, food allergies etc?

Custom lists can be used in the Customer CRM data, should the merchant want to record any custom options such as a list of food allergies you will need to create a custom list in the Web Portal. The Appointment Type options are within a system list already created in the system, you can edit these in the portal for the merchant.

3.11.2. Customers (CRM)

Question - Is there any specific details they want to record about their customers?

The Customer CRM data in the system can be tailored to the merchant's exact requirements, you can edit the fields of data recorded about customers within the Web Portal.

3.11.3. Appointments (CRM)

Question - Will you be booking appointments on the system, if so, what are you booking appoints against (staff, tables, booths etc)?

If the merchant will be booking appointments, you will need to configure a list of items / resources they can book appointments against, by default the system will book appointments against staff members but this is easily changed.

3.11.4. Text Reminders (CRM)

Question - Do they want to send appointment reminders via text message, if so, how many?

If the merchant will be booking appointments and wants to leverage text message reminders (charges apply), the content and frequency of the text messages will need to be configured in the Web Portal.

4. Service

This section outlines the key considerations and questions to raise to merchants in the services sector (Health & Beauty) where they could be dealing with staff commission as well as appointments and customers within the CRM.

4.1. Commissions

Question - Do your staff get commission, if so, what is the commission structure?

It is common within the service sector for staff to receive sales commission, some staff are self employed / commission only. Staff commissions are easily configured, each staff member can be assigned a commission rate (i.e. 1x, 2x, 0.5x etc), a percentage can also be set for each product. This structure allows for a standard percentage across their products and services whilst also giving the ability for individual staff members to receive more or less commission depending on seniority / skill etc. For example, a shampoo product could have a 10% commission, the apprentice might receive 10% (i.e. 1x rate) whereas the senior stylist might receive 30% (3x rate).

4.2. Customer Relationship Manager (CRM)

Question – Will you be using the Register CRM tools for managing customers and/or appointments?

If the merchant will be using the CRM you will need to check and configure the following items

4.2.1. Other Lists (CRM)

Question - Do you have any options you wish to record in the CRM such as appointment type, hair type etc?

Custom lists can be used in the Customer CRM data, should the merchant want to record any custom options such as a list of hair types or colours you will need to create a custom list in the Web Portal. The Appointment Type options are within a system list already created in the system, you can edit these in the portal for the merchant.

4.2.2. Customers (CRM)

Question - Is there any specific details they want to record about their customers?

The Customer CRM data in the system can be tailored to the merchant's exact requirements, you can edit the fields of data recorded about customers within the Web Portal.

4.2.3. Appointments (CRM)

Question - Will you be booking appointments on the system, if so, what are you booking appoints against (staff, chairs, booths etc)?

If the merchant will be booking appointments, you will need to configure a list of items / resources they can book appointments against, by default the system will book appointments against staff members but this is easily changed.

4.2.4. Text Reminders (CRM)

Question - Do they want to send appointment reminders via text message, if so, how many?

If the merchant will be booking appointments and wants to leverage text message reminders (charges apply), the content and frequency of the text messages will need to be configured in the Web Portal.