

EATA Quick Start Documentation

Documentation for those who do not read documentation.

Ensure your system is Windows compliant. We have tested on Win98, Win2000, Win XP pro and Win XP home.

If you are going to use more than one PC make sure network is installed and all PCs can use the printers. Decide which PC will be the data server and ensure all other PCs can "see" the server PC in network neighbourhood.

Install EATA on all PCs. This will create (by default) a folder C:\Program Files\EATA where the main eata.exe will reside (with other files) and a folder C:\Program Files\EATA\Databases where the blank databases are created.

If you have been supplied with a load-data routine most of the set up steps have been done for you but it is worth having a look at these points so if in the future you want to make changes you can.

To configure the system from scratch first go through all Admin screens (except Registration and Archive) to set up printers and other fields. See full documentation for meanings and uses of configuration settings. The system needs operators (Staff) and a menu (Sales Settings) to function.

If using a network ensure the folder on the "server", C:\Program Files\EATA\Databases, is shared and that all other PCs can access it with read write change permissions.

In the Admin >Settings >Local settings for all other PCs enter the path to the database as the network folder on the server.

The system is now ready for action. We still recommend you get and read the Documentation so that you can take advantage of all of the many features in EATA.

Set Current Trading Date To set the trading date each day (after End of Day for previous Day is complete) click the triangle to display a calendar. Select the trading date, which is usually the same as the system date. This will remain as the trading date on transactions until the next set date is performed. This allows for trading to cross midnight but remain as part of the same days trading.

End Of Day When all trading is completed for the day End of day is run. All invoices must be confirmed or deleted and all staff logged out. If any Invoices have not been completed the end of day routine will advise and not complete. The invoices must be processed then end of day re started. If staff are not logged off the system will ask if they should be logged out and if the answer is yes the system will perform log off and continue with EOD processing. The EOD has the option to count money to assist in till reconciliation. This provides a screen for entry of the actual coin count from the till and the system will calculate money held as well as advise if it agrees with the value expected. Once EOD is complete the Current trading date must be set before sales can be made.

Reports The reports menu has two displays. One allows for a preset selection of reports to be printed without viewing. The other display allows selection of an individual report that will be displayed and is then available for printing. The print Invoice option will print a receipt docket for a history sale. The export accounting data will create a file of data for import to an accounting system. **Marketing** The Marketing option provides a number of selection criteria that can be set up individually or in conjunction with other selections. Any transaction that matches all criteria set will have information about the customer to view or written to a file for user processing such as label, letter or email creation.

Staff The Management->Staff option allows for new operations staff (Drivers and operators) to be entered or maintained. Managers and Admin staff can only be created

and maintained using the Admin -> staff selection. The system provides for a name that can be a full name. The staff can be a driver in which case they can have a preset float nominated. The receipt of this float must be confirmed at log on. Drivers and Operators can have a quick ID assigned. This allows the user to enter the quick ID in the operator field for quick selection rather than select from a list. The quick ID must be unique for each staff member. To create a "log in" message, use the "Set Notice" selection. The text entered here will display to the user when they log in. It is a method to advise staff to perform some function during this shift.

Map The map function allows for the entry of new streets within the delivery area or maintenance of existing streets. It is necessary that the site ID for any street map entry is the same as the site ID set in the system set up. If this is not the same the system will not allow a delivery order to be processed. This is a way to verify that orders are within your designated delivery area. Enter all possible addresses and set the site id to other than the store site id for those outside your area.

Drivers As orders are created in the Sales screen they are displayed on the Drivers screen. They are presented in the order they should be delivered. A driver or dispatch control will assign each order as it is ready to be delivered. In the Driver window (F1)The driver is selected from a list of Drivers. If the driver is not yet logged in the log in can be confirmed at that time. The order to be assigned for delivery is highlighted. A driver may take more than one order if this is permissible in the shop. The orders are selected by pointing (mouse click) to the box or using the down arrows to highlight the order and press space to place the selection tick. Then select the Assign button to place the order in the driver window. (Bottom part of screen.) When the driver has completed the delivery they open their window, select the order and confirm. This presents a window for the driver to enter the delivery details. Depending on the set up selections the driver may need to enter all information or just confirm that what is there is correct. The delivery money is added to the driver's total commitment. The driver can at any time account for money received and put into store till value. This must be done at end of shift before the driver is allowed to logout. This window will require confirmed by a manager if the manager passwords are active. If the location of the PC with the driver screen is located where pick up orders are collected this screen can also process the money received from clients when they pick up an order. To display all orders,(not just delivery orders) the tick is removed from the Deliveries Only button at the top of the screen. To process a pick up order press F11 or select the "all Orders" button. This will display all orders. Select the order to be collected. Select the Confirm Button in the same window and the receive money window is presented. If the money taken is more than that required the system will display the change to be given. Display of orders uses color to highlight orders that may be or are late based on the promised delivery time. Orders can be reprinted or deleted from this window. Double clicking an order will display the details of what is on the order as well as the status of the order.

Sales The sales screen is where all orders are taken. The set up for each PC can assign the default order type so that PCs on the front counter can display the takeaway menu by default and the PC near the telephones can use Delivery as the default.

Default settings: When the EATA system is installed there are some items with established values. In the staff file there is an Admin user with a password of admin and a Manager user with a password of manager. If these are not changed when the password security is turned on these will give you access to the admin and manager areas.