

Quick start Management for EATA 2000 v2.0.1

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 had 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.

Archive

Management archive will allow for transaction data to be deleted from the current file. All reference to the data is lost to the system when this occurs so if the data is ever to be accessed it should be saved to a permanent location prior to archive.