

Users Guide

TuxSoft Email: info@tuxsoft.co.za

© Copyright 2013-2021 TuxSoft / R. Linder ALL RIGHTS RESERVED

Contents

Inst	alling TuxDiner	9
1.1	Typical Computer Requirements	9
1.2	Windows Installation	9
1.3	Linux Installation	10
1.4	Starting TuxDiner	17
Pre	ferences	19
2.1	SysInfo	20
2.2	Personnel	21
2.3	Printers & Email	27
2.4	Misc	29
2.5	License	31
Bas	ic Operation	33
3.1	Sales by touch interface	34
3.2	Sales by keyboad	36
3.3	Receipt	39
Adv	vanced Operation	41
4.1	Sales	41
	4.1.1 How Item searching works	41
	4.1.2 Order	42
	4.1.3 Print Bill	42
4.2	Receipt	42
4.3	Documents	43
	Inst 1.1 1.2 1.3 1.4 Pre 2.1 2.2 2.3 2.4 2.5 Bas 3.1 3.2 3.3 Adv 4.1 4.2 4.3	Installing TuxDiner 1.1 Typical Computer Requirements 1.2 Windows Installation 1.3 Linux Installation 1.4 Starting TuxDiner 1.4 Starting TuxDiner Preferences 2.1 SysInfo 2.2 Personnel 2.3 Printers & Email 2.4 Misc 2.5 License 2.5 License 3.1 Sales by touch interface 3.2 Sales by keyboad 3.3 Receipt 4.1 Sales 4.1.1 How Item searching works 4.1.2 Order 4.1.3 Print Bill

Contents

	4.4	\underline{C} lient	43
5	The	File menu	45
	5.1	Mail	45
		$\overline{5.1.1}$ Statements	45
		5.1.2 $\overline{\text{Email}}$	46
		5.1.3 \overline{R} enewals	46
	5.2	Admin	46
		$\overline{5.2.1}$ Backup	46
		5.2.2 \overline{C} ash Up	47
		5.2.3 Month End \ldots	47
		5.2.4 $\overline{\text{Receive Stock}}$	50
		5.2.5 \overline{C} ash Date	51
		5.2.6 Reset Sequence	52
		5.2.7 Waiter Cash Up	52
	5.3		52
	5.4	<u> </u>	53
		_	
6	The	Edit menu	55
	6.1	\underline{Find} Ctrl+F	55
	6.2	Search via Invoice# F12	56
	6.3	Change Invoice	56
	6.4	\underline{C} lients	56
		6.4.1 Merge	56
		6.4.2 Purge	57
	6.5	Manage	57
		$\overline{6.5.1}$ Departments	58
		6.5.2 Inventory	59
		6.5.3 Orders	61
		6.5.4 Suppliers	61
	6.6	Clear All Ctrl+L	63
		$\overline{6.6.1}$ Preferences	63

7	The	View menu 6	5
	7.1	Statement	55
	7.2	Journal	55
	7.3	Audit	66
	7.4	$\overline{\mathbf{R}}$ eports	57
		7.4.1 Outstanding Invoices	70
		7.4.2 Pending Orders	70
		7.4.3 Inventory Performance	70
		7.4.4 <u>N</u> ew Clients	71
		7.4.5 Client Purchases	71
		7.4.6 Client Expenditure \dots 77	12
		7.4.7 Client <u>D</u> ebt	73
		7.4.8 <u>Commissions</u>	14
		7.4.9 Stock Levels	15
		7.4.10 <u>Received Stock Audit</u>	15
		7.4.11 <u>Actions</u>	17
		7.4.12 Sales Person Performance	17
		7.4.13 Performance Analysis	17
		7.4.14 Price List	17
		7.4.15 All Clients	17
		7.4.16 Returnables	78
		7.4.17 Daily Stock Sales	78
		7.4.18 Voided documents	/8
8	The	Help menu 7	' 9
	8.1	$\overline{\text{Contents}}$ $$	79
	8.2	About	30
9	Svs	tem Customisation 8	81
-	9.1	Creating a new language	31
	9.2	Customising your Documents	32
	<i></i>	9.2.1 Invoice	33
		9.2.1 IIIVOICE	55

Contents

9.2.2	Quote	86
9.2.3	Receipt	89
9.2.4	Statement	91
9.2.5	Slip and ASCII printers	93

Introduction

TuxDiner is a modern point of sale application tailored to restaurants, that is supported on **Linux(tm)** and **Windows**(tm). With TuxDiner you get a choice of using a touch screen interface or the traditional keyboard interface, and indeed it is possible to use both ! Mixing of Windows and Linux or a Linux only or Windows only environment is also supported.

A comprehensive selection of reports will assist you with the management of your business.

Support

Via Email at info@tuxsoft.co.za Be sure to include your support details in your email. In some areas you may have telephonic support.

Bugs

You can send all bug reports to info@tuxsoft.co.za via email or use our bug reporting web portal. Users with a valid support option will get a reply and a projected fix time rapidly, and yes we call problems bugs, we fix bugs !

1 Installing TuxDiner

1.1 Typical Computer Requirements

Operating System	Linux 2.6 (Ubuntu 12.04LTS) / Windows Xp/7
Processor	AMD Ryzen / Intel i3 - Or better
Memory	1 GB Min, 4GB or more recomended
Display	1024x768 Minimum / 1280x1024 recomended
Network	100Mbit or better

In addition the usual peripherals such as mouse, DVD, etc. are required. The above specifications may be replaced with higher performance hardware at your leisure.

1.2 Windows Installation

Simply insert the TuxDiner CD into your CD-Drive. The TuxDiner installer should start automatically, if not your windows installation is not standard and you should have the skills to start the install. If not contact your system administrator. Note that throughout this manual the TuxDiner directory refers to the *C:\Program Files\TuxSoft* folder. In addition wherever you see the path /opt/tuxsoft/ you should replace this with *C:\Program Files\TuxSoft* or *C:\Program Files(x86)* if you are running 64Bit windows.

1 Installing TuxDiner

1.3 Linux Installation

Most modern Linux distributions support some form of automount, and as such the installer should just start. You will need to know the root password, if not your system admin will need to do the install. We recommend that you use the KDE environment. Note that throughout this manual the TuxDiner directory refers to the */opt/tuxsoft* directory. In addition wherever you see the path folder *C:\Program Files\TuxSoft* you should replace this with */opt/tuxsoft*

Creating a Database

In most cases before you create a database it is necessary to install a SQL database server, you may choose to use the SQLITE option, if you will run a single Linux or WindowsPC. With Linux it will be possible to use multiple stations if using thin clients. Supported database servers are MySql, Postgresql, and most ODBC interfaces.

You can obtain a copy of MySQL for Windows from http://www.mysql.com/ or from the contrib folder on the CD. We recommend you use MySQL or MariaDB.

After installation you should find a **dbTuxDiner** entry in your system's start or K menu. The **dbTuxDiner** utility is used to configure and populate a database for TuxDiner.

1 Installing TuxDiner



The first page in the dbTuxDiner wizard will inform you of any special requirements or useful information relating to your server type.

Figure 1.1: Database Setup Page 1

0	TuxDiner Databa	nse Setup 🤊 📀 🔿
erver and Da	tabase Selection	
	Choose the datasbase serve the hostname or IP running I Only MySQL, PostgreSQL, ar	r type you will be using with TuxDiner , and enter his server. (Not used for QSQLITE) ind SQLite have been tested.
	Server and Driver	_
	C QMYSQL3	C QPSQL7
	C QSQLITE	C QODBC3
	C QSQLITE3	C QTDS7
	Server localhost	
	- Database	
	User TuxDiner	
	Password ***	
	Name TuxDiner	(
	L	
		< Back Next > Cancel

Figure 1.2: Database Setup Page 2

On page two you can select your server type, host, Database user name, Database user password, and database name. Not all database servers support password protection, this is especially true on windows platforms. When using SQlite the database name is a physical path to the database file. Make sure you have permissions to read and write to the location you choose.

When installing under Windows 98 you must use your computers name. With windows XP you must use localhost or the physical IP of your PC.

Linux makes use of any valid name or IP address.

1 Installing TuxDiner



In most cases you will need to supply a name and password for your database administrator. *This is usually NOT the system root password*.

Figure 1.3: Database Setup Page 3

U	1 6
🗙 💿	TuxDiner Database Setup 🕜 🔗 🛞
Finish	
	(
🛛 😰 🙇 🛛 🖌	You must now select the tasks you would like the wizard to perform.
	After this your TuxDiner installation is complete
	····· , ····
	Create the TuxDiner Database
	✓ Update configuration files
	🔽 Restore data from backup
	< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel

Figure 1.4: Database Setup Page 4

You may use the dbTuxDiner utility to restore a backup of your database, or you can populate it with sample data from the backup samples provided. When you first install TuxDiner it might be a good idea to populate it with sample data so that you may learn and play with the system before committing to a running live system.

1 Installing TuxDiner



Figure 1.5: Database Setup Page5

An indicator showing the progress of the create and populate phase is shown, the actual time depends on the type of server and size of your database.



Figure 1.6: Database Setup Page 6

You are now ready to run TuxDiner, you need to take note of the Admin password if this is an empty or sample data install.

1.4 Starting TuxDiner

You can start TuxDiner from the TuxDiner menu in the KDE or Windows start menu. In most cases there will also be an icon on your desktop that will start TuxDiner. When running TuxDiner for the first time you will need to log in as the Admin using the login code of *tux* this can be changed using the <u>Edit</u> -> <u>Preferences</u> menu.

2 Preferences

2.1 SysInfo

🖌 TuxDiner Preferences 🎱	? 🗆 🗙
SysInfo Personnel Printers & Email Misc License	
Store Name	Language
Palette Paradise	English
Address	
Shop No 3	Mode Inclusive 💌
Seaview Centre	Levy 0.1400
Knysna Road	Name VAT
Tel: 000 123 4567	
VAT No 000000000	
Thanks	Levy 0.0000
	Name
	Price Categories
Thanks For Your Support	Base Price
	Name DINE IN
	Markup 1.3000
- Statement Footers	
	Name TAKE AWAY
	Markup 1.4950
Hand Over Footer	Tier 2
	Name Wholesale
	Markup 0.9000
OK	,,

Figure 2.1: SysInfo Page

The System Information page is used to configure your business details, tax settings, and footers for various customer documents.

Facility is provided for two tax levies in either Inclusive or Exclusive modes, if your country has more than two tax levies consider emigrating to a more democratic place. Jokes aside if a tax levy does not exist simply leave its name blank and its value at 0.0000 and TuxDiner will ignore it.

Your License or Lease is linked to the Store Name. This must be the trading name of your business, if this changes you will need a new License or Lease key.

As can be seen for the sample data it is possible to use trivial HTML markups in the footer fields to achieve a more dramatic effect.

Language - the GUI and documents may use a specific language catalogue. See the section on customisation for more information on creating a new language.

2.2 Personnel

The Personnel page is used to add and manage personnel and their privileges within TuxDiner.

2 Preferences



Figure 2.2: Personnel Page

When you first run TuxDiner there will only be the Admin personnel entry. Admin can not be deleted, however you should change the Admin password. To do this simply type in the new password into the **Code** field then click on the yellow **Update** button.

The next task will most likely involve adding a new personnel entry. To do this click on the green **New** button. You will be presented with a sequence of prompt dialogues as follows.

2.2 Personnel



The initials are used in the Sales page to identify the sales person and calculate any commission on sales.



Lastly you will enter the users code. This is the code the user will use to login to TuxDiner, all preferences and settings are linked to the users code.

After adding a new user to personnel you can fine tune the various preferences allocated to that user. These are described in more detail here.

- 1. **Commission** this value specified in percent is used to accumulate commission on sales and applied to the pre-tax amount.
- 2. **Cash Account** In some cases it may be desirable to have a given user associated with their own cash sales account. This would be needed if your installation has more than one POS terminal.
- 3. **GUI Style** This is just a modern day graphical gimmick, eye candy to waste CPU !
- 4. **Touch Interface** When checked the terminal will run in touch screen mode. No menus will be shown and waiter, table and document details are entered via popup dialogues.
- 5. Mail Statements Checking this option will enable the user

to print or email statements to all customers with a debit balance.

- 6. **Email Runs** This option should be disabled as it is not yet implemented.
- 7. **Backup Database** Checking this option will enable the user to create backups of the TuxDiner database.
- 8. **Cash Up** Checking this option will enable the user to perform the daily cash up and / or view the current cash situation.
- 9. **Month End** Checking this option will enable the user to print out a month end report.
- 10. **Receive Stock** Checking this option will enable the user to accept stock and enter it into the system.
- 11. Adjust Rec. Stock Prices Checking this option will allow the user to change the pricing of items during the receive stock operation.
- 12. **Purge Clients** Checking this option will enable the user to purge a customers account. All records will be removed from the system, you will have an option to produce a printout for back reference.
- 13. **Merge Clients** Checking this option will enable the user to merge two customer accounts into one. Useful when couples get married, or when names differ slightly and two or more accounts have been created for the same customer. For example *Byte and Pieces*, and *Bytes and Pieces CC*.
- 14. **Manage Merchandise** Checking this option will enable the user to add and edit Merchandise that you stock.
- 15. **Manage Services** Checking this option will enable the user to add and edit Services that you perform.
- 16. **Manage Suppliers** Checking this option will enable the user to add and edit suppliers known to your company.

- 17. **Order Stock** Checking this option will enable the user to activate the stock level and ordering process.
- 18. View Reports Checking this option will enable the user to view any of the available system reports.
- 19. View Audit Trails Checking this option will enable the user to view and print a complete audit trail of a given account, any notes will be shown in this trail.
- 20. View Journal Trails Checking this option will enable the user to view and print a journal trail for a given account.
- 21. View Statements Checking this option will enable the user to view and print a customers statement.
- 22. **Discount Sales** Checking this option will enable the user to discount invoiced items.
- 23. **Modify Preferences** Checking this option will enable the user to do anything.
- 24. **Tax Control** Checking this option will enable the user to enable or disable tax levies on a item to be invoiced.
- 25. **Price Override** Checking this option will enable the user to override the price of an item that was retrieved from the database.
- 26. Allow Unvalidated Items Checking this option will enable the user to invoice items not in the database, to be effective the user also needs price override and tax controls.
- 27. View Action Reports Checking this option will enable the user to view and clear the action log. The action log contains a history of any operation the user performs that is not normal operational procedure.
- 28. Select only Table/Room Checking this option will force the system to have the waiter choose the table or room from a graphical selection and disable typing the name.

- 29. Sticky Cash Acc Checking this option will make the default account the cash account associated with the user, however the user will still be able to select a client if needed.
- 30. **Refunds** Checking this option will enable the user to accept returned goods for refund.
- 31. Access Documents when enabled the user will be able to view an manipulate past documents using the Documents page.
- 32. **Void Invoices** When enabled a user will have the option to void an invoice if required.
- 33. **Void Receipt** when enabled the user will have the option to void a receipt is required.

When changing the active user settings the changes will become effective after a second or two. Language and style changes should be immediate.

2.3 Printers & Email

TuxDiner currently uses three printers. Physically these may all be the same printer or multiple printers at various locations.

2 Preferences

X 🖸 TuxDiner Pre	ferences	8005
SysInfo Personnel Printers & Email Misc License		
_ Invoice	Company Lo	ogo
Printer Slip Setup		
Mode Logo O Page O Slip80 Slip40 Preview		Powered By
Receipt		TUXSOFT
Printer Slip Setup		
Mode 🔵 Logo 🔵 Page 🔵 Slip80 💿 Slip40 🔀 Preview		Browse
Mailing	Slip40 Code	5 Slip80 Codes
Printer Slip Setup		
Mode 🔾 Logo 🔿 Page 🔿 Slip80 💿 Slip40		27,71,1
		27,71,0
Kitchen 1	< d>>	29.33.17
Printer slip_kitchen Setup	Sur	
Mode Off OPage Slip80 Slip40 X Preview		29,33,0
		27,69,33
Kitchen 2		27,69,32
Printer slip_drinks Setup		
Mode Off OPage Slip80 Slip40 X Preview	Printer Init	
	End of page	
Email	Cash Draw	27,112,48,55,121
SMTP Server SMTP Port 25		
Email Address	Paper Cut	29,86,66,6
	Logo	28,112,1,48
Page Colors		
Text Background	Blue Background	Dark Blue Background
ОК		

Figure 2.6: Printer and Email Settings

The Invoice, Receipt and Kitchen printers are self explanatory and used to print Receipts and Invoices. When enabled the Kitchen printer can be used to create order slips for your kitchen is applicable. The mailing printer is used to print all other customer documentation. Typically these documents would be posted to your customers.

You may also choose to use a logo in your documents, you should only choose logo's that are of a reasonable size. The actual printer configuration is system dependent, but should be familiar to most people. Logo support for slip printers is limited to printing images that have been saved into the printer non volatile RAM. You need to save the image to your slip printer using your printer manufacturers utility.

In order to email documents to customers you need to be able to connect to a SMPT server, the Email settings allow you to choose the server and port number to connect with. TuxDiner can not keep mail spooled waiting for an SMTP server. To use email the server must be on-line.

2.4 Misc

The Miscellaneous page contains settings for the backup media writer and the selections of fast cash banknotes. Bank notes can be used to speed up and reduce errors in the receipt process.

2 Preferences

		0 *** *			
K 0		TuxDiner Pre	ferences		0008
SysInfo Personnel	Printers & <u>E</u> mail	Misc License			
🗙 Qty Check	Take Out Change	🗙 FullScreen	Log Actions	Backup App.	
Rounding 5	Inter	est on Arrears 0		Max stateme	nt days 150
Report Preview]
Font Size 8	Scaling 1	Width	530 🖨 He	eight 590 🜩	Lines 24 🚔
Preview Window			Button Colour	Mode	
Font Size 8	Width 530 🖨	Height 590	No Colours	🔘 Text Colours 🤅	Button Colours
Epson DM-D Display P	ole		Cash Drawer]
Serial Port COM1 🔻	Speed 9600 🔻	DTR-DSR	Port SLIP40	▼ Speed 1200	DTR-DSR
-Bank Notes]
	Value 10		REINTRAL HARD PROCESSION AND	Value 20	
	Value 50			Value 100	
	Value 200			Value	
ок					

Figure 2.7: Misc

When the **Qty Check** option is checked, the quantity field in the sales keyboard page will automatically get focus and highlight after an item is scanned or located in the Item combo box. This is useful in businesses where the quantity of items is often not 1.

When the **Take Out Change** option is checked, a dialogue prompting you for change provided is presented when the invoice is processed. This allows a note to be added to the Invoice that is useful for take out orders where change is sent with the delivery.

The **Backup Media App**. can be any command that will take a file and write it to a backup medium. The %1 is replaced with the backup file name you specify at backup time.

Bank Notes can be changed simply by clicking on the note or empty

button, the Value field contains the value associated with the note.

Rounding allows you to round down your invoices to the nearest cent in rounding value. For example to round to 10c intervals use 10, to round to the nearest Rand use 100

Interest on Arrears select the interest rate in % for account in arrears.

Max statement days will determine the number of days an account goes overdue before statements are no longer automatically mailed.

Epson DM-D Display Pole these settings determine how a display pole, if any, is attached to the system.

Cash Drawer these settings determine how a simple serial cash drawer, if any, is attached to the system. If you use your slip printer kick facility you need to fill in those details on the printer page in the slip settings for Cash Draw.

2.5 License

The license page provides fields where you can enter your number of tills and license key information. Once a valid key is entered the 3 Table limit and watermark on printouts will be removed.

2 Preferences

		riguit 2	2.0. TUAL		50	
🗙 💿			TuxDiner Pref	erences	() ()) o (
SysInfo	<u>P</u> ersonnel	Printers & <u>E</u> mail	<u>M</u> isc <u>L</u> icense			
TuxDine	er 1.3					
Shop: 7	uxDiner					
Granted	l Rights					
You may concurrer	install this soft it till points ma	ware onto any numbe ay be active at any tim	r of computers at ne.	any location. Your lice	nse key will determine how	r many
Limitati	ons of Liab	llity				
In no ever restricted have beer	nt shall the de to lost revenu n advised of th	velopers or copyright le or profits or other d ne possibility of such d	holders be liable f irect, indirect, spe lamages, except t	for any damages whats ecial, incidental or cons o the extent invariable	oever, including - but not equential damages, even i law, if any, provides other	f they wise.
Warran	ty					
The Softw WARRANT	are and assoc Y OF DESIGN,	iated documentation a MERCHANTABILITY AN	ire provided AS IS ND FITNESS FOR A	with NO WARRANTY O PARTICULAR PURPOSE	F ANY KIND, INCLUDING TH	E
No. Tills	1	Expiry 2013/	12/31 🔷	Option 0		
Key					UPDATE	
ОК						

Figure 2.8: TuxDiner License

3 Basic Operation

Figure 3.1: Basic Keyboard Interface

🐼 💿 👘					TuxDiner			
<u>F</u> ile <u>E</u> dit	: <u>V</u> lew <u>H</u> elp							
-Client								
Pricing	Base 🔻	2					70	$\mathbf{\Lambda}$
F1 <u>T</u> able	TABLE 1	-	11	Table			79	
Waiter #	123							
			Ple	ease s	elect v	vaiter		
F9 Sales	<u>R</u> eceipt <u>D</u> ocuments	Client						
@ F2	F11 GOURMET PIZZA	s			Invoiced Ite	ms		
			(Qty.	Description	Disc.% Amount	
Waiter	RL	<u>C</u> at.	Inventory	-	1.00	PIZZA - DELUCA **LARGE**	0.00 40.64	F3 Preview
F2 <u>I</u> tem	EXTRA BACON			-		PREST DECOX ONECCE DO	0.000 00.40	
Code	65							
Qty.	1							F5 Clear All
Less	0.000	% Unit Price.						
		Total.		4.30 🖻				
								E6 Delete
				4				F7 Order
								ES Print Bill
							20-8-09	-11 21:41

In this chapter we describe the basic operation of TuxDiner from the moment a customer walks in your door till they leave after paying. For a waiters terminal you may wish to enable the **Select only Table/Room** preference. This will help prevent errors with client selections and simplify the user interface.

3 Basic Operation



Figure 3.2: Touch Screen Interface

3.1 Sales by touch interface

The most common operation of sales is likely to be that using the touch screen interface. This would be the default method for waiters. A waiter is a user who has the touch screen interface option enabled in preferences.

The touch interface is fast and simple to use, it is arranged by department with the toplevel being the department selection ordered by rank, which is set in Department management. Within each department the item icons are arranged as per their rank order in inventory management.

By default one item is added to the invoice when its icon is clicked, compositions will add multiple items based on the composition con-

tents. To change the number of items to add activate the **Qty** button then select the desired auantity using the number pad.

F9 Sales Receipt Documents <u>C</u>lient Ø F2 F11 GOURMET PIZZAS 5 Delete 2 5 6 8 9 OK N

Figure 3.3: Quantity editing on the Touch Interface

3.2 Sales by keyboad

In the Name field you can fill in the table number, customers name or part thereof . Focus can be changed to the name field using F1, Thats pressing the F1 key.

After entering the name or part thereof press **Enter** if a match is found it will be displayed in the combination box. If more than one match occurred, pressing **F4** will drop down a list of available matches. If using our sample data try **D** you should get a match of **D. DUCK'O**

Once you select the client the system will focus on the Waiter field you need to enter a valid waiter code and press enter, after this you can add items to the bill.

Now you are ready to invoice, select the item field in sales by pressing **F2** and then enter **GREEK** as we would like to add a GREEK SALAD to the invoice. Either press **Ctrl+A** or click the **Add** button, you can also just press Enter, the Quantity field will then have focus, you can change the quantity if required, pressing enter again will add the item.

This behaviour can be changed in preferences in the Misc section by checking or unchecking the **Qty Check** button. When unchecked, enter will add a single item immediately as was the case in Version 2.0 and before.

Next we would like to add a Californian pizza to our Invoice, this time however we will use the product code, enter 35 and press **Enter**.

We are now ready to place the order, this is done by touching or clicking the pink **Order** button, pressing **F7** is the shortcut for keyboard use. When the order is placed the associated items are printed onto the kitchen printers and the interface returns to the waiter login state.
Should we have enabled the Take Out Change option the following dialogue will be presented where we may enter an amount for change to be provided for. Leving the amount as 0 or by selecting cancel will not add a change note to the invoice.

Figure 3.4: Change For Dialogue



When the client is ready fore their bill, the table is seleceted and the green **Print Bill** button activated or **F8** is pressed. The bill will be printed onto the Invoice printer.

When the bill is to be paid, the waiter logs in and activates the green **Pay By Table** button, the selection will present the tables who have been billed and are ready to offer payment. Tables that have been served by the logged in waiter are shown with a red reflection. A waiter may accept payment for tables not served by them.

3 Basic Operation



Figure 3.5: Pay by table selection

When the Invoice preview is presented, assuming previews are enabled, choosing any option on the Preview other than **Close** will process the invoice into the system. The Receipt page will automatically raise in anticipation of payment.

3.3 Receipt

	Figure 3	.6: R	eceipt Pag	e			
F9 Sales 🕴 F10 Receipt Decum	ients <u>Client</u>						
Balance	122.30	F10 Cash		1 7 7 4 5 4 7 6 7 1 7	Inv. # Amount	F5 Clear All	
		C/Card	135				
Outstanding	0.00	Cheque		1 2 3 4 5 5 3 8 8 4 1 8			
		Coupon				F3 Refresh	
Change Due	0.00			· · · ·			
🔲 Keep Credit		тјр	12.70				
Ref Notes						F6 Cash Draw	
			F8 Process				

If enabled you can use the fast cash bank notes to enter an amount responding to the physical bank notes tendered by the customer. You can also fill in amounts by hand, if payment is made by Cheque or Credit Card the exact amount owing will be filled in when the payment type option is selected. In addition a further field will become enabled to allow you to enter the cheque or card number.

When a return for refund is processed, the amount tendered field will contain a negative value indicating the value to be refunded to the customer. If you would like to leave the amount as a credit in the account you can simply ignore the Receipt phase, press **Ctrl+L** to clear and return to Sales

If the client would like to leave the change as a credit or you receive a deposit (down payment) then simply check the **Keep Credit** option, this will leave the account in credit and set the change due to 0.00 For this to work the selected client must have the **Keep Credit** option enabled in their account settings.

3 Basic Operation

You may also choose to ignore certain invoices when receiving payment. To do select only the applicable invoices in the selection list as you do this the amount owning will change to reflect the new selection. By default all invoices are selected.

When ready you can click the green Process button. After accepting the presented document the system will clear and again be ready for sales.

4 Advanced Operation

4.1 Sales

Depending on the preferences settings it may be possible to alter the selling price, whether tax is applicable on an item, and to apply discounts. All these features are self explanatory. You can also change the Department selection, two special cases exist for Notes and Remarks, Notes are private and will only appear in audit trails and are intended for your personal records. Remarks are printed on the Invoice and intended to inform the customer to related information.

4.1.1 How Item searching works

The Item field is a very versatile tool, you can search for products by name, part thereof, or item code. When more than one product matches the description you can drop down a list of matches or scroll through the list using the arrow keys. When scrolling through the list the item code indicator will update with each items product code.

When connecting a bar code scanner to your system, you should program your scanner to append a CR (carriage return) to the end of the bar code, this will have the effect of automatically adding the item to your invoice. To add multiple items of the same type, first enter the quantity then press F2 and finally scan the product. You can also choose to always verify the quantity by checking the Qty

4 Advanced Operation

Check option in Misc preferences.

Items can be added to the Invoice by pressing Enter or using the **Ctrl+A** accelerator, likewise items can be removed from the invoice by highlighting the required item then using the **Ctrl+R** accelerator. The Add and Remove buttons may also be used.

4.1.2 Order

This will close an invoice temporarily and print any instructions for items on their designated kitchen printers. It is also possible to directly use the Print Bill function, that would also print to the kitchen printers if required but at the same time close the bill in anticipation of payment.

4.1.3 Print Bill

This closes the invoice for the selected Client / Table / Room and prints the bill in anticipation of payment.

4.2 Receipt

The receipt process is simple, but we mention a few points that you may overlook.

- 1. Always choose the Payment by method first, this will usually automate the filling in of the rest of the required fields excluding Cheque or Credit Card no.
- 2. When payment is made by card it is possible to enter the tip amount and then have the assistant fill in the total, or to fill in the amount in which case the assistant will fill in the Tip.

- 3. When using the fast cash bank note facility, pressing subsequent notes add their value to the amount tendered field.
- Remember you can use Alt+C to get focus to the cash amount tendered field, and Alt+O to get focus on the coupon amount field. Clicking the other payment option buttons will fill in the default payment amount from the selected source. It is possible to accept payment from multiple sources.
- 5. When an account is in credit you may simply skip the receipt process and press **Ctrl+L** to clear and ready the system for new transactions.
- To leave items on account skip the receipt process and press Ctrl+L to clear and ready the system for new transactions. The accounts will printed/mailed with the <u>File</u> -> <u>Mail</u> -> <u>Statements</u> facility, usually done at month end.
- 7. Bank note setup is done using the Preferences dialogue.

4.3 Documents

The documents page is used to view past documents associated with an account. You can view Invoices, Receipts, Quotes, and Refunds. Simply highlight the document you wish to view and click the appropriate colour coded button.

4.4 Client

The client page is used to add customers and/or update their details, the discount fields will not be editable unless the user has discounting privileges. If the Keep Credit option is checked for a client then

4 Advanced Operation

they can maintain an account in both credit and debit. This is useful for customers who pre-pay or who run a tab.



In addition the Client page may be used to search for customers using any of the available fields. For example to locate all customers who have a 5% discount simply enter 5 in the associated discount field then press **Ctrl+F** or use the **Edit** -> **Find** menu option. You may also use the wild card % character, for example to locate all customers who have 5 or 5.x use 5%.

You can use the % wild card in may ways, for example to find all clients who have phone numbers like xxx 375 xxxx or 375 xxxx or 375x xxx the key would be to locate phone numbers containing 375 so we would use %375%

The wild card character is extremely useful when searching addresses and notes.

5 The File menu

Whenever a letter is shown as $\underline{\mathbf{Underlined}}$ a simple key press will select that menu option.



5.1 <u>M</u>ail



5.1.1 Statements

Using this option will search through the system for accounts with outstanding balances and compile statements for mailing. Interest

is calculated on overdue accounts, and long overdue accounts are printed with a hand over for collection warning. The collection message is configured in the SysInfo page?? of the preferences dialogue.

5.1.2 <u>E</u>mail

Currently this option is not implemented and should be disabled in the Personnel preferences.

5.1.3 Renewals

This option is used to create mailings for clients who have products that require renewals in the near future. An example would be club membership or licenses.

5.2 Admin



5.2.1 Backup

This will back up your database to a specified file. Unlike your database server backup tool, the built in TuxDiner backup may be re-

stored using the dbTuxDiner utility to any of the supported database architectures.

In addition the Misc preferences dialogue allows you to configure an application that will write this backup file to media. In the command the %1 will be replaced with the file name you choose for your backup.

5.2.2 Cash Up

The Cash Up facility is used to produce Invoice and Payment Summaries, Invoice Histories, Receipt Histories, and Receipt Summaries for your daily transactions. It can operate in Preview or Print mode. When operating in Preview mode, the reports are generated and can be viewed or printed however no housekeeping is done and the books remain open for further transactions.

When print mode is selected, the reports are automatically printed for your Accounting records, the books are closed for the day and totals reset. In addition internally transactions are archived, this keeps TuxDiner running fast and smooth for years and years. You may only notice delays when retrieving documents or searching for data that has been archived.

The Cash Up procedure should be run daily, or even at shift changes.

5.2.3 Month End

Month end reports can be generated for any month and year you require.

5 The File menu



Figure 5.1: Date Selection

The following reports are generated. A Revenue Summary, this lists the number of clients per day, the total Invoiced, and Received as well as the average of these per client.

A performance Summary will indicate where your income is being

generated.

A Tax or Vat Summary will give you a detailed tax report taking into account discounts, bad debt, arrears etc. In addition it reports the total and percentages of received payments by payment type.

5.2.4 Receive Stock

This option will present a dialogue where the operator can enter details of Stock accepted on delivery.

		riguie 5.	2. r			SIUCK		
Þ	TuxSho	p - Recieve Stock 🥮					?	
ſ		[Qty.	UOM	ltem	Supplier	Adjus
				6		APPLETISER	THE SOFTDRINK DEPOT	٢N
	Notes							
			-					
	<u>S</u> upplier	THE SOFTDRINK DEPOT						
	<u>l</u> tem	COKE						
	Code	119 🔀 Adjust prices if required	4					
	<u>Q</u> uantity	6 Stock evel						
	Cost	3.51 Markup 1.4000 Price 5.60						••
	Pro	cess					Car	ncel

Figura 5 2. Dessive Stock

The operation is simple and works in the same manner as the Sales page. The Notes field is only added when Process is clicked as these note refer to the delivery as a whole and not to a specific item. In most cases the supplier is automatically located. If you have more than one supplier supplying an item you should select the correct supplier in the supplier field.

The results of the Receive stock facility can be viewed using the reports option.

The Notes field is only added when Process is clicked as these note refer to the delivery as a whole and not to a specific item. In most cases the supplier is automatically located. If you have more than one supplier supplying an item you should select the correct supplier in the supplier field.

The results of the Receive stock facility can be viewed using the

reports option.

The Item field is a very versatile tool, you can search for products by name, part thereof, or item code. When more than one product matches the description you can drop down a list of matches or scroll through the list using the arrow keys. When scrolling through the list the item code indicator will update with each items product code.

When connecting a bar code scanner to your system, you should program your scanner to append a CR (carriage return) to the end of the bar code, this will have the effect of automatically adding the item to your invoice. To add multiple items of the same type, first enter the quantity then press Alt+I and finally scan the product.

Items can be added to the Invoice by pressing Enter or using the Ctrl+A accelerator, likewise items can be removed from the invoice by highlighting the required item then using the Ctrl+R accelerator. The Add and Remove buttons may also be used.

When making stock level adjustments you should check the **Stock Level Adjustment** box, this will allow you to enter negative quantities to cater for shrinkage or spoilage.

Depending on the users permissions they may be able to view and update prices and markups.

5.2.5 Cash Date

This performs the same operation as the Cash Up facility, however you are presented with a date selection dialogue that allows you to choose the date for the Cash Up. Note this option can not be used in place of a cashup operation and is intended to review days in the past.

5.2.6 Reset Sequence

Selecting this option will reset the sequence number used on orders and invoices. It will not affect the invoice number. Usually the sequence number is reset at the start of each day.

5.2.7 Waiter Cash Up

This option is used to present a report for a waiter cashup at the end of a shift. The intended use is for establishments who's waiters manage and maintain their own cash purse. You start by selecting the date of the required cashup, next you select the waiter required from the prompt dialogue, the following reports will be provided.

Waiter Cas	h Up										
For: Mon Sep 9 2013	•	Wai	ter 1	invoi	ces	Waj	ter R	ecei	ots		
Ross		For: ROS	Mon Sep 9 SS	2013		For: Ros	Mon Sep 9 2 SS	2013		Other Waiter	Receipts
No. Inv. 9 No. Rec.	8										
		8	TABLE 1		77.84	3	TABLE 1		77.84	For: Mon Sep 9 2013	
Cash Received	41.70	9	TABLE 1		29.70	4	TABLE 1		29.70	Ross	
Other Received	366.40	10	TABLE 1		12.00	5	TABLE 1		12.00	Nooo	
Less Cash Tips	2.09	11	TABLE 1		29.42	6	TABLE 1		29.42		
Less Non Cash Tips	0.00	12	TABLE 1		35.28	7	TABLE 1		35.28		
Cash total Owe/Due	41.70	14	TABLE 1		68.15	8	TABLE 1		68.15	Cash Received	0.00
		15	TABLE 1		68.15	9	TABLE 1		96.13	Other Received	0.00
Total Served	416.67	16	TABLE 1		27.98	2	TABLE 2		59.58	Less Cash Tips	0.00
Total Received	408.10	13	TABLE 2		68.15					Less Non Cash Tips	0.00
Total Tips	2.09					Total	Receieved	408.10		Cash total Owe/Due	0.00
Service Reward	0.49%	Total	Invoiced	416.67						Total Tips	0.00

These reports can also provide some useful information with regards to your staff performance.

5.3 Logout

Activating the logout option will lock the system and prompt for a new user code. You should note that this is an application level control and has nothing to do with the system user login. Each users preferences and physical layout of the application will be restored when they log in.

5.4 Exit

Simply exits the TuxDiner application, this can only be activated from within a valid session and not while the system waits for a login.

6 The Edit menu

Whenever a letter is shown as <u>Underlined</u> a simple key press will select that menu option.

<u>F</u> ind	Ctrl+F
Search on S/N	
Search via Invoice #	F12
Change Invoice	
<u>C</u> lients	•
<u>M</u> anage	+
C <u>l</u> ear All	Ctrl+L
Preferences	
Returns	

6.1 Find Ctrl+F

The find facility is used to activate the search engine for customers. By default the Name field searched when Enter is pressed, all other fields need activation with this option. The most common use is to find clients based on account number or any detail in the Client page. For example to locate all customers who have a 5% discount simply enter 5 in the associated discount field then press **Ctrl+F** or use the **Edit** -> **Find** menu option. You may also use the wild card

% character, for example to locate all customers who have 5 or 5.x use 5%.

You can use the % wild card in may ways, for example to find all clients who have phone numbers like xxx 375 xxxx or 375 xxxx or 375x xxx the key would be to locate phone numbers containing 375 so we would use %375%

6.2 Search via Invoice# F12

This option is the preferred method of selecting which Invoice is to be paid. A dialogue requesting the Invoice number will be presented, if found the receipt page will be shown with the client/table preselected and the correct Invoice highlighted ready to accept payment.

6.3 Change Invoice

This option will allow one to edit an already printed Invoice. This is useful when the customer notices that the wrong item has been invoiced, for example an Orange Juice, that should have been part of their breakfast and not a separate billable item.

6.4 Clients

6.4.1 Merge

This facility allows you to merge two account into a single account. For example Miss Swan marries Mr Gander, and now they would like a single account to Mr Gander. Perform the following actions. Select Miss Swan in the name field, now use the Merge menu option, next select Mr Swan in the name field and again use the Merge menu option. Miss Swan's account will now be taken over by Mr Ganders account. Of course dialogues guiding you and confirming your actions will be presented as you proceed.

6.4.2 Purge

When you choose to purge a client from your system, all records relating to that client will be removed. Before the actual purge takes place you will be offered the chance to print out records of the client to keep on file.

6.5 Manage



6.5.1 Departments

Figure 6.1: Departments								
😽 💽 Tux	Diner - I	⊃epa	rtment	м 🚺	2 🛇	08		
Department	PIZZAS				De	elete		
🗙 Printer 1					N	lew		
Printer 2	PIZZA	s				date		
Department	t	lcon		Rank	•			
PIZZAS			>	1		:		
GOURMET P	IZZAS		>	2				
SUBS		-50		3		-		
CHITAS		S		4				
TOPPINGS		5		5				
•					(
CLEAR					C	lose		

You may add as many departments as are required, however it may be prudent to think about operation of the touch interface and the number of levels that may be required to navigate. The order of the

6.5 Manage

Departments on the touch panel can be adjusted using the Up and Down rank buttons. The touch display is populated from left to right and top to bottom.

Departments also have a definition as to which kitchen printer is used (if any), simply check the required option.

6.5.2 Inventory

K O			Ē	uxDiner - S	tock Manage	ement				000	۲
Code 1		Description PIZZA - MARGHER	ITA							Delete	
иом		DTR 0 Department	PIZZAS		▼ To	uch Label 🛛	ARGHERITA			F8 New	
In Stock	5.000	Re Order @ 0.000			Order Qty.	.000	On Ord	ler 0.000		F5 Updat	e
Supplier	OFFICE				🗾 🔻 Depa	artment Filter	PIZZAS		-	Search	
🗌 Prici	ng Assitant	Returnable Cost 10.96		Marku	p 1.4000	s	ales Price 15	.35		0	
Tier1 M	arkup 1.0000	Tier1 Price 10.96		Tier	Markup 1.0	000	Tier2 Pri	ce 10.96		J	
Code	Department	Description	UOM	Cost Price	Sales Price	Tier1 Price	Tier2 Price	In Stock	Touch Label	lcon	
5	PIZZAS	PIZZA - REGINA		15.88	25.34	0.00	0.00	5.000	REGINA		
7	PIZZAS	PIZZA - ROCK & ROLL		16.43	26.22	0.00	0.00	5.000	ROCK & ROLL		
9	PIZZAS	PIZZA - THAI		17.54	27.98	0.00	0.00	5.000	THAI	\bigcirc	:
11	PIZZAS	PIZZA - CARIBBEAN		17.54	27.98	0.00	0.00	5.000	CARIBBEAN		(
13	PIZZAS	PIZZA - BBQ ROAST CHICKEN		17.54	27.98	0.00	0.00	5.000	BBQ CHICKEN		
•	1	1	1		1		1		1	• •	
CLEA	IR									Clos	e

When inserting new entries the code must be unique, product bar codes can be used with TuxDiner, or you may choose a simple ascending number. If left blank TuxDiner will try choose the next sequential number automatically. The unit of measure is used in the invoice and the audit history.

The Cost, Markup, Sell exc. and Sell inc. fields all work together, in addition if Tax's are enabled the Tax check buttons affect the Sell inc. Fields. When the tax, cost or markup of an item is changed

6 The Edit menu

the two sell fields will automatically update to reflect the new sales price. In practice it often occurs that the final selling price becomes something like R146.01 this causes change problems for typical cash items such as bags of dog food. In this case you might elect to adjust the selling price by hand to R146.00 bear in mind that coupled with your tax rate it may not be possible to get a rounded number. For example with a TAX rate of 14% and a selling price or R148.24 the total inclusive would be R168.99, changing the selling price to R148.25 would result in a selling price of R169.01

You adjust the price by modifying the Sell exc. Field, as you modify this field, the Sell inc. price will update. You will also notice that the Sell exc. field changes colour to red, this is to warn you that the price has been modified, and is not the same as the automatically calculated price.

It is also possible to adjust the final selling price including VAT. When adjusting this field the ENTER key must be pressed to force an update of the Sell exe. field.

When deleting, updating, or creating new entries dialogues will confirm your requested action, and warn you when data will be changed. Errors are also reported via dialogues, get into the habit of reading the messages in these dialogues as they are there to prevent unwanted actions from destroying your data.

The supplier field its possible entries from the list of suppliers that is managed in the Supplier panel. The use of this field is critical if you wish to use the automatic stock control and ordering facilities of TuxDiner.

To disable stock control on any items adjust to ToQuantity to 0, this will inform the system that no stock control on this item is required. For services such as annual licenses that should be re-purchased it is possible to set the DTR (Days to Renewal) field to contain the number of days till the repurchase is required. For example an annual

license would be set to 365. Using the File, Mail, Renewal menu option the system will automatically produce a Renewal Reminder within 20 days of the renewal expiry date. These reminders are used to preempt your clients to purchase a renewal of the item or service.

The order of the Inventory items on the touch panel can be adjusted using the Up and Down rank buttons. The touch display is populated from left to right and top to bottom.

By using the Department filter you can choose to display only inventory items that exist in the selected department. This is useful when you have a large number of stock items.

6.5.3 Orders

Activating this option will check all Merchandise stock levels and generate order forms for suppliers who's product ranges are below the re-order level. The system will not re-order items already on back-order.

When the document is presented for printing the behavior is identical to that of Invoices and Receipts in that the Close option will cancel the request, all other options will result in the system assuming the transaction is completed.

6.5.4 Suppliers

The supplier page provides simple record management of the suppliers of Merchandise to your business. The Company field is used in Merchandise management to ensure that automatic order forms can be created.

6 The Edit menu

1/ Tux	Shop - Supplier N	Nanagement	9		
Name	THE SOFTDRINK	C DEPOT			
Contact	кім				
Email	KIM@SOFTDRIN	K.DEPOT			
Notes	ACCEPT ORDE EMAIL	RS VIA	Postal Address		
Compar	ny Name	Contact	Email		Phone
OFFICE					
THE SOF	TDRINK DEPOT	КІМ	KIM@SOFT	DRINK.DEPOT	123 123 456
•				*****	
Clear					

Figure 6.3: Suppliers

All the fields are self explanatory, but beware unlike other fields there is no automatic formatting so care should be used to enter data in a manner that will produce acceptable printouts. For example we suggest using "Hills" vs. "hills"

6.6 Clear All Ctrl+L

The Clear all facility clears the interface and places the system in a state read to start new transactions. All references to previously access accounts are cleared. This is mostly used after invoicing to an account that has a credit option and will pay later, when the Receipt page is raised, **Ctrl+L** will ready the system for the next customer.

6.6.1 Preferences

This will activate the Preferences dialogue, see section 2

7 The View menu

Whenever a letter is shown as <u>Underlined</u> a simple key press will select that menu option.



7.1 Statement

Activating this facility will display a statement for the currently selected client. This will be done even if that clients balance is 0 or in debit. This is an extremely fast and simple technique to confirm inquiries from clients as to their account status.

7.2 Journal

Activating this facility will display a journal trail of Invoices and Receipts for the currently selected client. The trail can be printed or 7 The View menu

emailed if required.

7.3 Audit

Activating the Audit trail will present a document containing a complete and detailed trail of all transactions made with the currently selected client. In addition your private notes will also be displayed in this trail. The audit trail is your tool for sorting out possible conflicts with clients over purchases and payments.

Your private notes could be useful in reminding you of promises you or your staff might have made that now only your client remembers.

7.4 Reports

Outstanding Invoices
Pending Orders
Inventory Performance
<u>N</u> ew Clients
Client <u>P</u> urchases
Client <u>E</u> xpenditure
Client <u>D</u> ebt
<u>C</u> ommissons
Stock <u>L</u> evels
Recieved Stock Audit
Actions
S/P Performance
Performance Anal <u>y</u> sis
Price List
All clients
Returnables
Daily Stock Sales
Voided documents

The reporting functions of TuxDiner assist you in your ERM and CRM of your company. If you require additional reports and functionality you should lodge a feature request with us at info@tuxsoft.co.za

Reports fall into to main categories, historical reports and current reports. Historical reports provide you with comparisons over a six month period. When presented with the date selection for historical reports the date selected is month 6 of the six month period. For current reports it is the month for that report.



Figure 7.1: Date selection

In addition historical reports can have items selected to chart for a visual comparison of these results.

7.4 <u>Reports</u>



Figure 7.2: Charting Reports

7 The View menu

To Chart Items simple select and highlight the entries required then click the **Chart** Button.

7.4.1 Outstanding Invoices

This report presents a fast table of outstanding Invoices, useful to tell if a table being vacated has paid their bill.

7.4.2 Pending Orders

This report produces a table of clients / tables who have placed orders but have not yet received their bill, it can be useful to check if a table is waiting to be served or waiting to receive their order or bill.

7.4.3 Inventory Performance

The merchandise report will generate a historical comparison of merchandise sold over a six month period until the date selected. The merchandise report supports charting of your results. Clicking on the column titles will sort the list of items according to that column. A second click reverses the sort order.

Inventory Report							
Description	2004-04	2004-05	2004-06	2004-07	2004-08	2004-09 🔺 🛔	
APPLETISER						6	
SALAD - GREEK						4	
SUBS - THAI **LARGE**						2	
PIZZA - HAWAIIAN						2	
PIZZA - DELUX CHEESE BURGER *						2	
GARLIC PITA						2	
DESERT - MEGA ICE CREAM						2	
COKE						2	
CHOCOLATE DOUBLE THICK SHAK						2	
VANILLA SHAKE							
VANILLA DOUBLE THICK SHAKE							
TOMATO COCKTAIL							
TEA							
SUBS - VEGETARIAN **LARGE**							
SUBS - VEGETARIAN							
SUBS - TUX DELUX **LARGE**							
SUBS - TUX DELUX							
SUBS - THAI							
SUBS - CLUB **LARGE**						•	
SUBS - CLUB						÷	
Print		Chart				Close	

Figure 7.3: Inventory Performance

7.4.4 New Clients

The new clients report will generate a historical comparison of the number of new client your business has registered over a six month period until the date selected. The new clients report supports charting of your results. Clicking on the column titles will sort the list of items according to that column. A second click reverses the sort order.

7.4.5 Client Purchases

The client purchases report is a current report that gives the items purchased per client for the selected month. This may be useful in deciding which clients should be sent information on a promotion you may be having.

7 The View menu

hat gives the items purchased per client for the selected month. This may be useful in deciding which clients should be sent information on a promotion you may be having.

🕅 💿		TuxDiner Reporter	
	Client	s Purchases Repo	ort
Client 👻	Account No.	Description	Quantity 🔺
TABLE 1	2	VANILLA SHAKE	3.00
TABLE 1	2	PIZZA - CLUB	3.00
TABLE 1	2	PIZZA - CLUB **LARGE**	2.00
TABLE 1	2	COLD MILK	3.00
TABLE 1	2	EXTRA GREEN PEPPER	4.00
TABLE 1	2	PIZZA - HAWAIIAN	3.00
TABLE 1	2	PIZZA - MARGHERITA	4.00
TABLE 1	2	EXTRA HAM	4.00
TABLE 1	2	PIZZA - THAI	1.00
TABLE 1	2	SALAD - THAI	2.00
TABLE 2	3	VANILLA SHAKE	1.00
TABLE 2	3	PIZZA - HAWAIIAN	1.00
TABLE 2	3	EXTRA ONION	1.00
TABLE 2	3	EXTRA GREEN PEPPER	1.00
TABLE 2	3	SUBS - THAI **LARGE**	1.00
TABLE 2	3	PIZZA - MARGHERITA	1.00 ::::
TABLE 2	3	COLD MILK	1.00
TABLE 2	3	CAPPUCCINO	2.00
TABLE 2	3	GARLIC PITA	1.00
TABLE 2	3	CHOCOLATE SHAKE	1.00
TABLE 2	3	EXTRA HAM	1.00
TABLE GORDON	14	PIZZA - CLUB	1.00
TABLE GORDON	14	FOAM	2.00
TABLE GORDON	14	PIZZA - CASALINGA **LARGE**	1.00
TABLE GORDON	14	CAPPUCCINO	2.00 💌
Print	Ch	Export	Close

Use the column heading to sort by Client, Description or Quantity.

7.4.6 Client Expenditure

The client expenditure report is that gives the total expenditure per client for the selected month. This may be useful in determining dis-
count offering for clients based on expenditure rather than frequency of visits.

🐹 💿	TuxDin	er Reporter		• • •
Clie	ents Expe	nditure	Repor	t
Client 👻	Account No.	Expenditure		
TABLE 1	2		824.67	
TABLE 2	3		127.73	
TABLE GORDON	14		98.06	
Print	Chart	Expo	rt	Close

Figure 7.5: Client Expenditure

7.4.7 Client Debt

A report that is useful for the terrible task of collection of moneys outstanding. All clients with outstanding debt are shown. Those who are overdue are shown in red. In addition the contact details for the clients are shown.

With business's that have a common client base this list can be used as a shared list of clients who have bad debt.

7.4.8 Commissions

Figure 7.6: Commissions

	Sales	Commissi	on Report	
Sales Person 🔹	Total Sales.	Commission		
Ross	170.96	17.10		
Ross	341.92	34.19		
Print		Chart		Close

The commissions report presents a table of commission due to your sales personnel. Entries shown in Red are on sales made but not yet paid for.

7.4.9 Stock Levels

Code •	Description	UOM	Quantity	On Order	Hand Count
0	Pizza - Margherita		5.00	0.00	
1	Pizza - Margherita		5.00	0.00	
2	Pizza - Margherita **Large**		5.00	0.00	
3	Pizza - Hawaiian		4	0.00	
4	Pizza - Hawaiian **Large**		5.00	0.00	
5	Pizza - Regina		5.00	0.00	
6	Pizza - Regina **Large**		5.00	0.00	
7	Pizza - Rock & Roll		5.00	0.00	
8	Pizza - Rock & Roll **Large**		5.00	0.00	
9	Pizza - Thai		5.00	0.00	
10	Pizza - Thai **Large**		5.00	0.00	
11	Pizza - Caribbean		5.00	0.00	
12	Pizza - Caribbean **Large**		5.00	0.00	
13	Pizza - BBQ Roast Chicken		5.00	0.00	
14	Pizza - BBQ Roast Chicken **Large**		5.00	0.00	
15	Pizza - Vegetarian		5.00	0.00	
16	Pizza - Vegetarian **Large**		5.00	0.00	
17	Pizza - Delux Cheese Burger		5.00	0.00	
18	Pizza - Delux Cheese Burger **Large**		4	0.00	
19	Pizza - Club		5.00	0.00	

Figure 7.7: Stock Levels

The stock levels report presents a list of stock, the quantity on hand, the quantity on order, and an empty slot to fill in hand count for reconciliation.

7.4.10 Received Stock Audit

This report is unique in that it presents documents for printing or viewing. Whats more it may present multiple documents in succession. In fact one document for each delivery that took place during the selected month.

Figure 7.8: Received Stock Audit

Receieve Stock		
Sales Person: Ross		
OLYMPIC	PROMO HAS	ENDED.
Qty.	UOM	
		COCACOLA
96		COKE
Print Process		

Notes for the delivery are shown in mauve, subsequent suppliers are grouped and highlighted fore easy identification.

7.4.11 Actions

The actions report is a log of all activity that has taken place excluding normal sales and invoicing operations, discounts and price changes are logged. The actions log is intended to help you keep tabs on your staff and locate any abnormal behavior. It can clearly indicate when staff are having problems with various aspects of your business or the use of TuxDiner. After viewing the log you may optionally clear it.

7.4.12 Sales Person Performance

Provides a table containing the sales performance for the past six months from the date selected.

7.4.13 Performance Analysis

Provides a selection of reports in the same fashion as a month end, however you can select the start and ending date ranges for the report. It includes a Revenue Summary, Performance Summary, and am Income Summary.

7.4.14 Price List

Provides a table containing sales prices grouped by department.

7.4.15 All Clients

Provides a table of Clients / Tables /Rooms present in the system.

7.4.16 Returnables

Provides a table of outstanding returns, typically this is used to keep track of items such as cutlery and crockery that may have been on loan to clients who have take out orders.

7.4.17 Daily Stock Sales

This report provides a table containing the item code, item description, cost and sales price of all items sold on a given day, it can be exported to be used in a spread sheet if required.

7.4.18 Voided documents

This report provides a list of voided documents within a given date range.

8 The Help menu

8.1 Contents ...

This presents an online version of this users guide.

8 The Help menu

8.2 About

Figure 8.1: Help About



The help about dialogue presents information on the logged in user, their default cash account, and your license or lease status.

9 System Customisation

In this chapter we describe how you can customise various aspects of TuxDiner to suit your environment.

9.1 Creating a new language

You can select the language that each user will have the TuxDiner GUI operate in from the Personnel page in the Preference dialogue.

Before a language can be chosen its message catalogue must be created. This process is not complex, but is rather time consuming. To create a new message catalogue or update an existing catalogue follow these steps.

- 1. Change directory to /opt/tuxsoft/i18n/TuxDiner (Windows use C:\Program Files\TuxSoft\i18n)
- 2. Check if a message catalogue for your locale exists, if so proceed to step 4
- Copy each of the template file to the required name matching your locale. For example ..
 cp i18n.ts af ZA.ts
- 4. Run the application 'linguist' and **open** the newly created 'ts' or existing catalogue file.
- 5. Add translations for all needed texts, **Save** and then **Release** your translations.

9 System Customisation

- 6. Change directory to /opt/tuxsoft/share/TuxDiner
- 7. Copy the English directory to one with the name of your newly created language. For example..
 cp -a English af_ZA
 or...
 xcopy /E English af_ZA
- 8. Edit each of the document parts in your new folder translating all strings as required.
- 9. Start TuxDiner and select the new language in the SysInfo page of the Preferences dialog.

9.2 Customising your Documents

TuxDiner uses a versatile system for document printing. All documents are created from a simple subset of HTML templates. Note do not use Java or Java Script they are unsupported. These template are divided into three sections. WARNING DO NOT USE WYSI-WYG HTML TOOLS, USE ONLY A PLAIN TEXT EDITOR, USING MICROSOFT TOOLS FOR WEB EDITING OR EXTENSIONS WILL BREAK YOUR SYSTEM.

- 1. The Head this contains the title, the client and your address information, and the basic header for items to be added to the document.
- 2. The Items this contains a repeatable section that is used to add items to the document.
- 3. The tail this closes the document off and adds any footers required.

Data is replaced into the documents by searching them for \$keywords embedded in standard HTML comments. For example <!-\$date-> might be replaced with 2004-09-04 The existing documents are contained in *share/TuxDiner/English* folder of where TuxDiner is installed, on Linux the default is */opt/tuxsoft* and on windows *c:\Program Files\Tuxsoft* or *c:\Program Files(x86)\TuxSoft* You can examine these an gain a clear idea of the principles used. You can also commission us at Tuxsoft to customise your documents to suite your requirements. If you have created a new language or are using one of the onse supplied, replace *English* with the language created, Eg. *af_ZA*

In addition some templates are stored in TAX1 and the TAX2 folders, these are choosen depending on the tax selections made in Preferences. The structure uses a fallback system falling back from TAX2 to TAX1 and finally back to the template root, Eg. English.

The following Documents are available, all have the format of Doc**Head**.html Doc**Item**.html and Doc**Tail**.html we do not recommend editing the Audit, Journal, Stock, Cashup or Monthend classes.

9.2.1 Invoice

The Invoice has the following keywords, remember to embed with <!-\$keyword->

Keyword	Description
logo	Image source for fancy logo
number	Document number
date	localised date
datetime	localised date and time
shortdate	yyyy-mm-dd
time	hh:mm:ss
acc	Clients account number
client	Clients name
postal	Clients postal address
shipping	Clients shipping address
phone	Clients phone number
cell	Clients cell phone number.
email	Clients email address
aline1	Address line 1 as in SysInfo
aline2	Address line 2 as in SysInfo
aline3	Address line 3 as in SysInfo
aline4	Address line 4 as in SysInfo
aline5	Address line 5 as in SysInfo
aline6	Address line 6 as in SysInfo
aline7	Address line 7 as in SysInfo
sequence	sequence number of the day (Order number)

Table 9.1: Invoice Head Keywords

Keyword	Description
quantity	The number of items
iquantity	Integer number of items.
uom	Unit of Measure
department	The department of the item
description	The description of the item
date	localised date
datetime	localised date and time
shortdate	yyyy-mm-dd
time	hh:mm:ss
price	the price of the items(s)
unitprice	The unit price of the item.
category	The category of the item
discount	The discount given
tax1	Y or N to indicate taxable
tax2	Y or N to indicate taxable
taxflags	* = Tax1, # = Tax2, exempt

Figure 9.1: Invoice Item Keywords

Keyword	Description
tax1	Value in % of tax1
tax1name	Name of tax Eg. VAT
tax1total	Value of tax1
tax2	Value in % of tax2
tax2name	Name of tax Eg. GST
tax2total	Value of tax2
subtotal	Total excluding taxes in Exclusive mode
total	Total including taxes
exctotal	Total of tax exempt items
exc1total	Total of tax1 exempt items
exc2total	Total of tax2 exempt items
invfoot1	Invoice Footer as in SysInfo
invfoot2	Invoice Footer as in SysInfo
cashier	Name of the personal logged in.
date	localised Date of transaction
datetime	Localised date and time of the transaction
shortdate	yyyy-mm-dd
time	hh:mm:ss
sequence	Order number
number	Invoice number
acc	Account Number
client	Client name

Table 9.2: Invoice Tail Keywords

9.2.2 Quote

The Quote has the following keywords, remember to embed with <!-\$keyword->

Keyword	Description
logo	Image source for fancy logo
number	Document number
date	localised date
datetime	localised date and time
shortdate	yyyy-mm-dd
acc	Clients account number
client	Clients name
postal	Clients postal address
shipping	Clients shipping address
phone	Clients phone number
cell	Clients cell phone number.
email	Clients email address
aline1	Address line 1 as in SysInfo
aline2	Address line 2 as in SysInfo
aline3	Address line 3 as in SysInfo
aline4	Address line 4 as in SysInfo
aline5	Address line 5 as in SysInfo
aline6	Address line 6 as in SysInfo
aline7	Address line 7 as in SysInfo

Table 9.3: Quote Head Keywords

U	
Keyword	Description
quantity	The number of items
iquantity	Integer number of items.
description	The description of the item
price	the price of the items(s)
unitprice	The unit price of the item.
category	The category of the item
discount	The discount given
tax1	Y or N to indicate taxable
tax2	Y or N to indicate taxable
taxflags	* = Tax1, # = Tax2, exempt

Figure 9.2: Quote Item Keywords

Keyword	Description
tax1	Value in % of tax1
tax1name	Name of tax Eg. VAT
tax1total	Value of tax1
tax2	Value in % of tax2
tax2name	Name of tax Eg. GST
tax2total	Value of tax2
subtotal	Total excluding taxes in Exclusive mode
total	Total including taxes
exctotal	Total of tax exempt items
exc1total	Total of tax1 exempt items
exc2total	Total of tax2 exempt items
invfoot1	Invoice Footer as in SysInfo
invfoot2	Invoice Footer as in SysInfo
cashier	Name of the personal logged in.
date	Date of transaction

Table 9.4: Quote Tail Keywords

9.2.3 Receipt

The Receipt has the following keywords, remember to embed with <!-\$keyword->

Keyword	Description
logo	Image source for fancy logo
number	Document number
date	yyyy-mm-dd
acc	Clients account number
client	Clients name
postal	Clients postal address
shipping	Clients shipping address
phone	Clients phone number
cell	Clients cell phone number.
email	Clients email address
aline1	Address line 1 as in SysInfo
aline2	Address line 2 as in SysInfo
aline3	Address line 3 as in SysInfo
aline4	Address line 4 as in SysInfo
aline5	Address line 5 as in SysInfo
aline6	Address line 6 as in SysInfo
aline7	Address line 7 as in SysInfo

Table 9.5: Receipt Head Keywords

Figure 9.3: Receipt Item Keywords

Keyword	Description
description	The description of the item
payment	The amount paid

Keyword	Description
tender	Total amount tendered
change	Change due
outstanding	Outstanding amount on account
recfoot	Receipt footer as in SysInfo

Table 9.6: Receipt Tail Keywords

9.2.4 Statement

The Statement has the following keywords, remember to embed with <!-\$keyword->

Keyword	Description
logo	Image source for fancy logo
number	Document number
date	yyyy-mm-dd
acc	Clients account number
client	Clients name
postal	Clients postal address
shipping	Clients shipping address
phone	Clients phone number
cell	Clients cell phone number.
email	Clients email address
aline1	Address line 1 as in SysInfo
aline2	Address line 2 as in SysInfo
aline3	Address line 3 as in SysInfo
aline4	Address line 4 as in SysInfo
aline5	Address line 5 as in SysInfo
aline6	Address line 6 as in SysInfo
aline7	Address line 7 as in SysInfo

Table 9.7: Statement Head Keywords

Figure 9.4: Statement Item Keywords

Keyword	Description
date	yyyy-mm-dd
description	The description of the item
amount	The value of the transaction

Keyword	Description
total	Total for the statement
current	Current balance
day120	120+ Day balance
day90	90 Day balance
day60	60 Day balance
day30	30 Day balance
statefoot1	Statement footer as in SysInfo
statefoot2	Statement footer as in SysInfo
statefoot3	Statement footer as in SysInfo
handed	Message if account handed for collection, blank if not.

Table 9.8: Statement Tail Keywords

9.2.5 Slip and ASCII printers

There are a few very basic features that may be used when creating forms for your slip or ASCII printer. In the preferences editor you can define codes for BOLD on, BOLD off, Emphasised on and Emphasised off text modes, the template files have the extension .slip and .slip40

Here are some examples for an HP laser or deskjet.

 BOLD ON
 27,40,115,49,66

 BOLD OFF
 27,40,115,48,66

 EMPHASIZED ON
 27,40,115,49,83

 EMPHASIZED OFF
 27,40,115,48,83

Table 9.9: HP slip codes

An example of an Epson FX series printer

I I I I I I I I I I I I I I I I I I I	I
BOLD ON	27,71
BOLD OFF	27,72
EMPHASIZED ON	27,69
EMPHASIZED OFF	27,70

Table 9.10: Epson FX slip codes

An example for Epson ESC/POS slip printers

Table 9.11: Epson ESC/POS slip codes

BOLD ON	27,71,33
BOLD OFF	27,72,32
EMPHASIZED ON	27,69,33
EMPHASIZED OFF	27,70,32

Text justification

It is also possible to justify parameters to some extent in the slip templates, to left justify to a given with use the following format. [-38]<!--\$owner--> to right justify use the following format [38]<!--\$aline1-->

So for example you template might include the line..

[-38]<!--\$owner-->[38]<!--\$aline1-->

This would place the owners name on the left of the page and the name of your practice on the right.

Embedding Codes

You can also embed printer specific codes into your documents using the **&code&** facility. A common use would be in the tails of documents where one would like the printer to form feed the page. In this case we would simply use the code **&12&** at the end of out template.

You could also use this technique to set your page length, cut the paper, or even print the document type in a larger font. The embedded codes however have no effect on the preview dialogue.

Comments

Slip templates now support comments using the standard # as a comment indicator. The # must be the first character in a line for that line to be treated as a comment.

License

This document and associated software are copyright © 2007 though 2013 TuxSoft CC. All rights reserved.

Granted Rights

You may install and distribute this software freely provided that the complete package is distributed and all credits to TuxSoft remain. *You may not distibute your License Key*

Limitations of Liability

In no event shall the developers or copyright holders be liable for any damages whatsoever, including - but not restricted to lost revenue or profits or other direct, indirect, special, incidental or consequential damages, even if they have been advised of the possibility of such damages, except to the extent invariable law, if any, provides otherwise. Warranty The Software and associated documentation are provided AS IS with NO WARRANTY OF ANY KIND, IN-CLUDING THE WARRANTY OF DESIGN, MERCHANTABIL-ITY AND FITNESS FOR A PARTICULAR PURPOSE.

List of Figures

1.1	Database Setup Page 1	12
1.2	Database Setup Page 2	13
1.3	Database Setup Page 3	14
1.4	Database Setup Page 4	15
1.5	Database Setup Page5	16
1.6	Database Setup Page 6	17
2.1	SysInfo Page	20
2.2	Personnel Page	22
2.3	New User Name	23
2.4	New User Initials	23
2.5	New User Code	24
2.6	Printer and Email Settings	28
2.7	Misc	30
2.8	TuxDiner License	32
3.1	Basic Keyboard Interface	33
3.2	Touch Screen Interface	34
3.3	Quantity editing on the Touch Interface	35
3.4	Change For Dialogue	37
3.5	Pay by table selection	38
3.6	Receipt Page	39
4.1	Client Page	44
5.1	Date Selection	48

List of Figures

5.2	Receive Stock	0
6.1	Departments	8
6.2	Inventory	9
6.3	Suppliers 6	2
7.1	Date selection	8
7.2	Charting Reports 6	9
7.3	Inventory Performance	1
7.4	Client Purchases	2
7.5	Client Expenditure	3
7.6	Commissions	4
7.7	Stock Levels	5
7.8	Received Stock Audit	6
8.1	Help About	0
9.1	Invoice Item Keywords	5
9.2	Quote Item Keywords	8
9.3	Receipt Item Keywords	0
9.4	Statement Item Keywords	2

Index

Adjust Rec. Stock Prices, 25 Allow Unvalidated Items, 26 Backup Database, 25 Backup Media App, 30 bank, 33 Bank note setup, 43 Bank Notes, 30 bar code scanner, 41 Cash Account, 24 Cash Drawer, 31 Cash Up, 25 cheque or card number, 39 Commission, 24 Disable stock control, 60 **Discount Sales**, 26 Drawer, 31 DTR, 60 Email Runs, 25 Epson DM-D Display Pole, 31 GUI Style, 24

Invoice and Receipt printer, 28 Language, 21 logo in your documents, 28 Mail Statements, 24 Manage Merchandise, 25 Manage Services, 25 Manage Suppliers, 25 Merge Clients, 25 Modify Preferences, 26 Month End, 25 Notes and Remarks, 41 Order Stock, 26 Price Override, 26 Purge Clients, 25 Qty Check, 30, 36, 42 Receive Stock, 25 Refunds, 27 Rounding, 31

Index

Select only Table/Room, 26 SMPT server, 29 Sticky Cash Acc, 27 Stock Level Adjustment, 51

Take Out Change, 30 Tax Control, 26 tax levy, 21 Touch Interface, 24

View Action Reports, 26 View Audit Trails, 26 View Journal Trails, 26 View Reports, 26 View Statements, 26 Void Invoices, 27 Void Receipt, 27 Copyright © 2013-2021 TuxSoft / R. Linder. All rights reserved Tuxsoft http://www.tuxsoft.co.za