

Quick Menu Mode Users Guide

IT Special Projects

May 2017

PrismPOS v1.8.9+



Nebraska Book Company

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Contents

PrismPOS Quick Menu	4
Quick Menu Terms and Navigation	5
Configure Quick Menus.....	7
Add a New Quick Menu Profile	7
Configure a New Quick Menu Pages/Columns	8
Creating Quick SKUs Page/Column	8
Creating Non Merchandise Page/Column	12
Create Pages/Columns Setup in PrismCore.....	13
Create Made to Order Page/Column	14
Attach a Quick Menu Profile to a POS Register.....	18
PRISMPOS Register.....	20
Using the Quick Menu to Sell Quick SKUs, Non-Merchandise and Made to Order items	21
Made to Order other Buttons	26



PrismPOS Quick Menu

Quick Menu allows you to add items on a PrismPOS register that make for faster, more efficient transaction, particularly with deli-type transactions. Configuration of Quick Menu takes place in Admin Tool and accessed by selecting the Quick Menu/Special Items button the home screen at the register(s).

There are several types of items that may be added under the in the Quick Menu. Some originate from PrismCore and others created in Quick Menu.

Quick Menu mode allows you to add items to a PrismPOS cash register not needed on registers anywhere else.

This document looks at all types of items that may be setup within the Quick Menu.

They include:

- Pay In and Pay Out
- Gift Cards
- DCC Sales
- Quick SKUs
- Non-Merchandise
- Made to Order Items

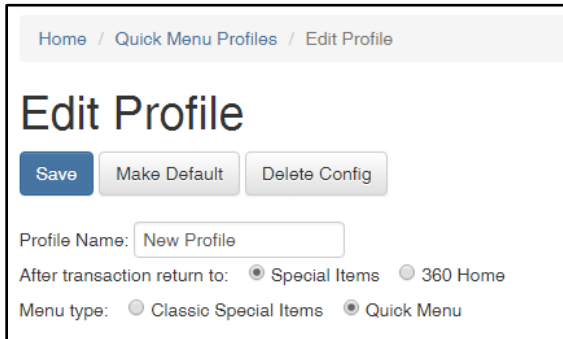
Note: Throughout this document you will see inconsistencies due to changing the names of Nebraska Book Company's software products. It will take sometime to complete all changes within the software itself. Thank you for your patience.



Quick Menu Terms and Navigation

In Edit Profile there are 6 areas:

- Profile Name:
- After transaction return to:
- Menu type:
- Search Items page
- Organize page
- Edit page



Field	Definition
Profile Name:	Name to identify the profile.
After transaction return to:	Special Items: Return to/start at the Special Items screen. 360 Home: Return to/start PrismPOS home screen.
Menu type:	Classic Special Items: Quick Menu access button called Special Items. Will display as Figure 1. Quick Menu: Quick Menu access button called Quick Menu. Will display as Figure 2.

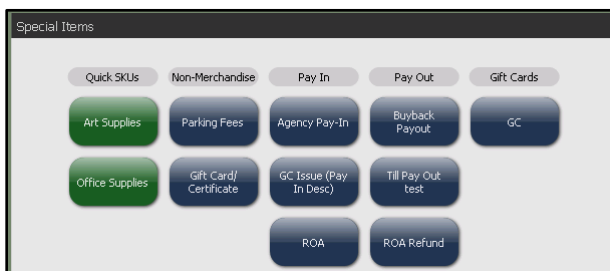


Figure 1: Menu Type Special Items

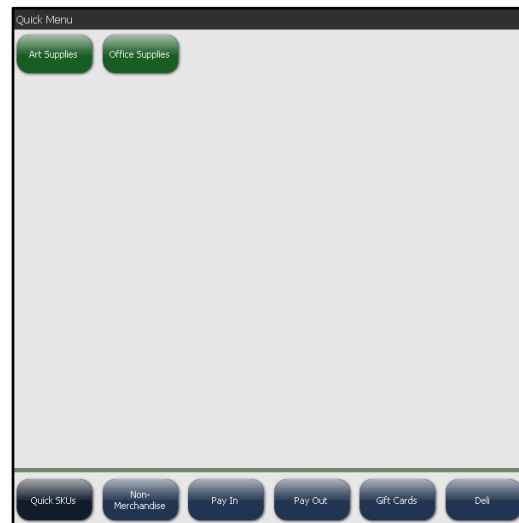
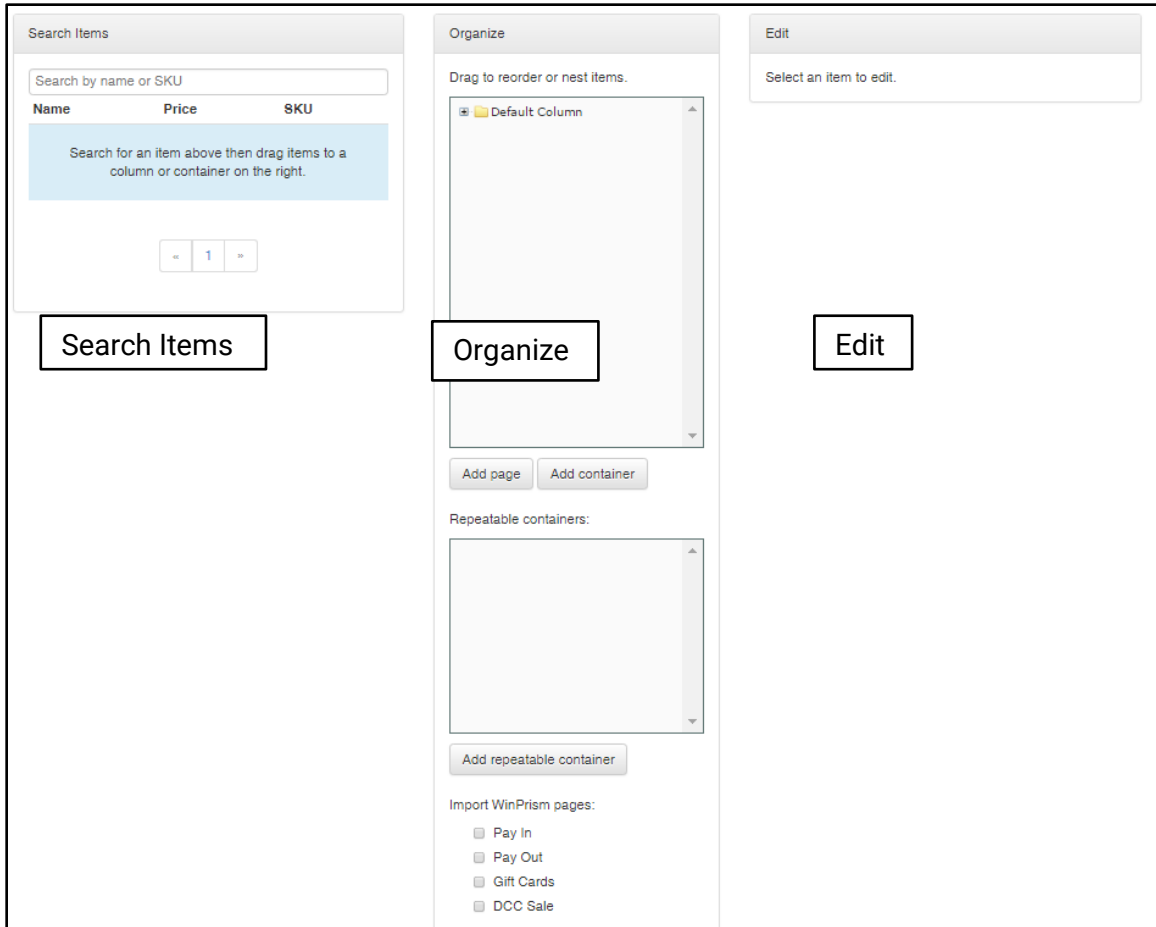


Figure 2: Menu Type Quick Menu



Field	Definition
Search Items:	Search items: Search for existing items from PrismCore Item/Inventory Maintenance and/or Non Merchandise. Drag items to pages in Organize frame.
Organize:	Drag to reorder or nest items: Clicking Add Page button below the frame adds pages. Add items to pages using Search items and drag/drop. Clicking Add Container button below the frame, with a page highlighted, adds container folder(s) under pages. Resulting buttons viewable at the register. Repeatable containers: Set up containers to use multiple times. Drag them to the appropriate place in the Drag to reorder or nest frame. Import WinPRISM pages: Checking boxes pulls setups from PrismCore resulting in that box displaying in the Drag to reorder or nest items and creating a page.
Edit:	Edit: Display varies based on selection in Organize page.




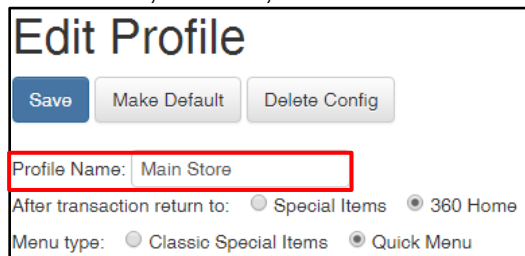
Configure Quick Menus

Set up one or more Quick Menu Profiles. Profiles are attached to registers.

1. Open a web browser (Internet Explorer, Google Chrome, etc.).
2. Access the PrismPOS Admin Tool.
3. Using the information provided by POS Support, enter the **Site, User name, and Password**.
4. Select the **Log in** button.
5. On the PRISM360 ribbon, select **Configuration**.
6. From the Configuration menu on the left, select **Quick Menu**.

Add a New Quick Menu Profile

1. In the Quick Menu Profiles, in the **Choose POS System** drop down, choose the correct POS System.
2. Select the  button.
3. Change the “New Profile” name to a more descriptive profile name. For example, Main Store, C Store, etc.



Edit Profile

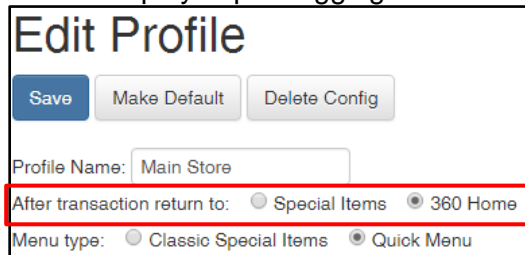
Save Make Default Delete Config

Profile Name: Main Store

After transaction return to: Special Items 360 Home

Menu type: Classic Special Items Quick Menu

4. Select the ‘After Transaction return to’ option you want. This controls what screen displays upon logging in and after a transaction is completed.



Edit Profile

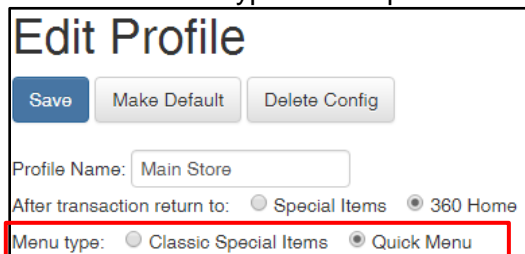
Save Make Default Delete Config

Profile Name: Main Store

After transaction return to: Special Items 360 Home

Menu type: Classic Special Items Quick Menu

5. Select the Menu type for this profile.



Edit Profile

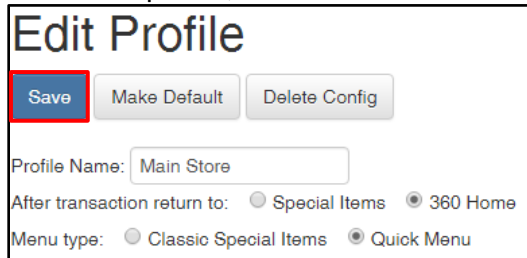
Save Make Default Delete Config

Profile Name: Main Store

After transaction return to: Special Items 360 Home

Menu type: Classic Special Items Quick Menu

- When completed, select the **Save** button.



Edit Profile

Save Make Default Delete Config

Profile Name:

After transaction return to: Special Items 360 Home

Menu type: Classic Special Items Quick Menu

- Use Search Items, Organize, and Edit to add pages to your Quick Menu.

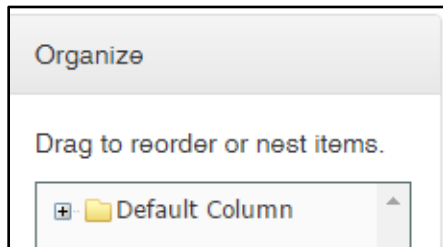
Configure a New Quick Menu Pages/Columns

This section covers four types of Quick Menu pages that may be created.

Creating Quick SKUs Page/Column


Quick SKUs are existing PrismCore items that do not have a barcode attached to scan or for some other reason you find the quick menu to be a better option for selling those items.

- Select the **Default Column**.



Organize

Drag to reorder or nest items.

 Default Column

Note: If the Default Column has already been used, click on **New page**, below the frame, to add additional pages/columns.

- In **Edit** the **Page Label** displays.

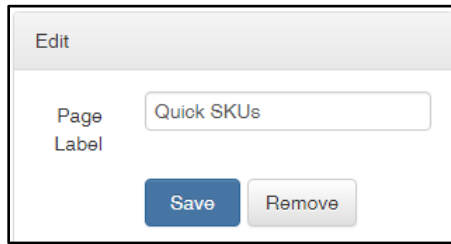


Edit

Page Label:

Save **Remove**

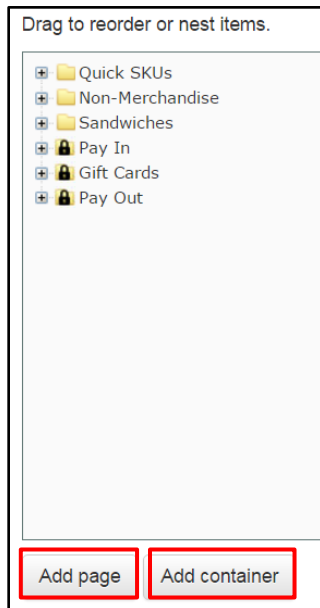
3. Rename the page/column.



The screenshot shows a dialog box titled "Edit". Inside, there is a label "Page Label" on the left and a text input field on the right containing the text "Quick SKUs". Below the input field are two buttons: "Save" (highlighted in blue) and "Remove".

4. Select **Save**.
5. To add additional pages or containers within pages, select **Add page** or **Add container** button below the frame.

Note: Containers are further sub-folders/categories of items.

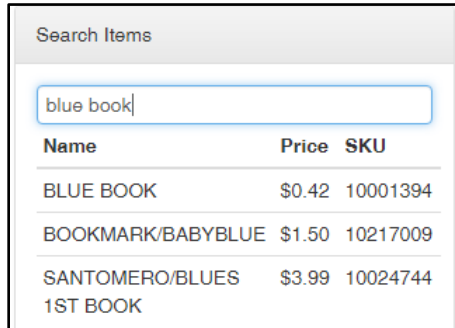


The screenshot shows a dialog box titled "Drag to reorder or nest items." It contains a list of items, each with a plus icon and a lock icon: "Quick SKUs", "Non-Merchandise", "Sandwiches", "Pay In", "Gift Cards", and "Pay Out". At the bottom of the dialog, there are two buttons: "Add page" and "Add container", both of which are highlighted with red boxes.

Adding Items from PrismCore to Pages/Containers

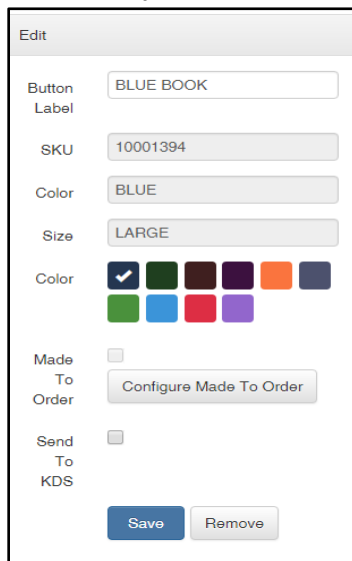
Any number of items or containers with items, depending on the quick menu you are building, may be added. All items must exist in PrismCore in either Item Maintenance or Non Merchandise.

1. Enter the name (description, author, title) or SKU, of the item to add to your Quick SKUs page/column, in **Search Items**.



Name	Price	SKU
BLUE BOOK	\$0.42	10001394
BOOKMARK/BABYBLUE	\$1.50	10217009
SANTOMERO/BLUES 1ST BOOK	\$3.99	10024744

2. Locate the item.
3. Select, drag, and drop it in the Quick SKUs folder.
4. **Edit** displays information about the item:



5. Input changes, if any, and **Save**.

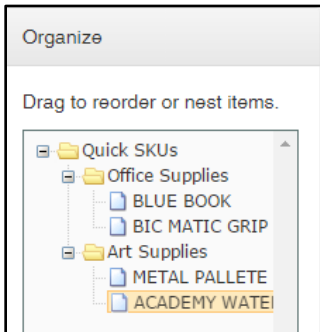
Item Notes:

- **Button label:** You can re-name the button for this item.
- **SKU:** PrismCore SKU for this item.
- **Color:** PrismCore color for this item, if applicable.

- **Size:** PrismCore size, if applicable.
- **Color** (with color buttons): Color you want the button of this item to be on the PRISMPOS register screen.
- **Made to Order:** If a 'Made to Order' item choose this option.
- **Send to KDS:** If you want to send this information to a KDS (Kitchen Display System), choose this option.

6. Continue adding items to the Quick SKUs page.

Note: You may organize your Quick SKUs by creating containers under the page/column and dragging items in those folders. See example below.

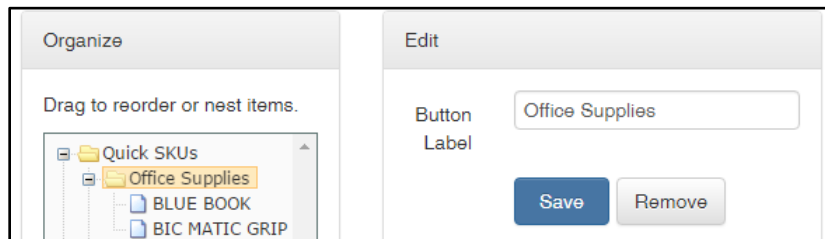


7. Add a container by highlighting the page/column.

8. Select the **Add container** button.

9. Highlight the Container folder.

10. Rename the new container in **Edit**.

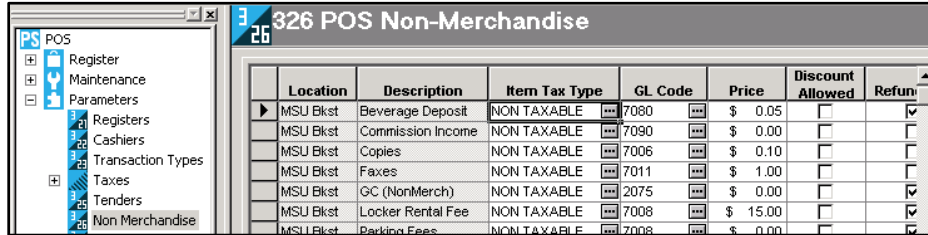


11. Select **Save**.

12. Add items to the new container.

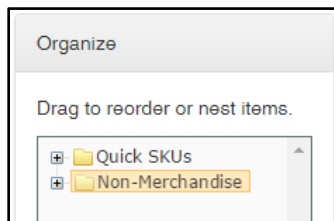
Creating Non Merchandise Page/Column

Non Merchandise includes items or services that are not part of your inventory tracked in ICS. Non Merchandise set up starts in PrismCore Admin -> POS tab -> Parameters -> Non Merchandise.



Location	Description	Item Tax Type	GL Code	Price	Discount Allowed	Refun
MSU Bkst	Beverage Deposit	NON TAXABLE	7080	\$ 0.05	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MSU Bkst	Commission Income	NON TAXABLE	7090	\$ 0.00	<input type="checkbox"/>	<input type="checkbox"/>
MSU Bkst	Copies	NON TAXABLE	7006	\$ 0.10	<input type="checkbox"/>	<input type="checkbox"/>
MSU Bkst	Faxes	NON TAXABLE	7011	\$ 1.00	<input type="checkbox"/>	<input type="checkbox"/>
MSU Bkst	GC (NonMerch)	NON TAXABLE	2075	\$ 0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MSU Bkst	Locker Rental Fee	NON TAXABLE	7008	\$ 15.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MSU Bkst	Parking Fees	NON TAXABLE	7008	\$ 0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

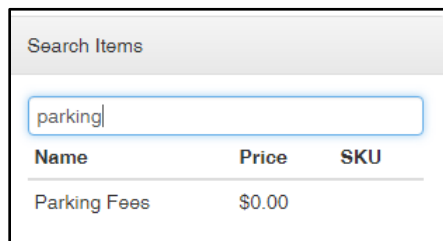
Once Non Merchandise is set up in PrismCore Admin you may add them to a page in Quick Menu. Follow steps 1-10, **Creating Quick SKUs Page/Column**, naming the page Non Merchandise.



Adding Non Merchandise Items from PrismCore to Pages/Containers

Non Merchandise items are added to the Non Merchandise page using the same method as regular items. You are limited to searching by the name of the Non Merchandise item. Create additional containers to organize your non-merchandise items, if you wish. See **Adding Items from PrismCore to Pages/Containers**.

1. Enter the Non Merchandise item in **Search Items**.



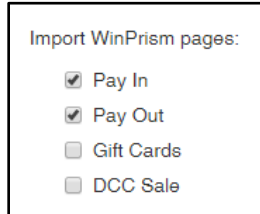
Name	Price	SKU
Parking Fees	\$0.00	

2. Select, drag, and drop the item in the Non Merchandise folder.
3. Use **Edit** if you needed and **Save**.
4. Continue finding and dragging Non Merchandise items to the page.

Create Pages/Columns Setup in PrismCore

Check options, in Import PrismCore pages frame, at the bottom of Organize, to add these pages/columns. The 4 options are all set up in WPAdmin.

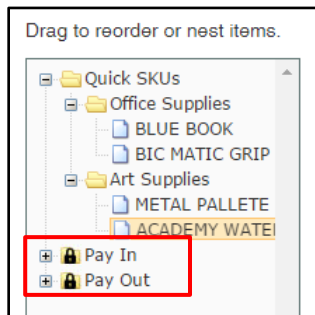
1. Check the Pay In and Pay Out boxes.



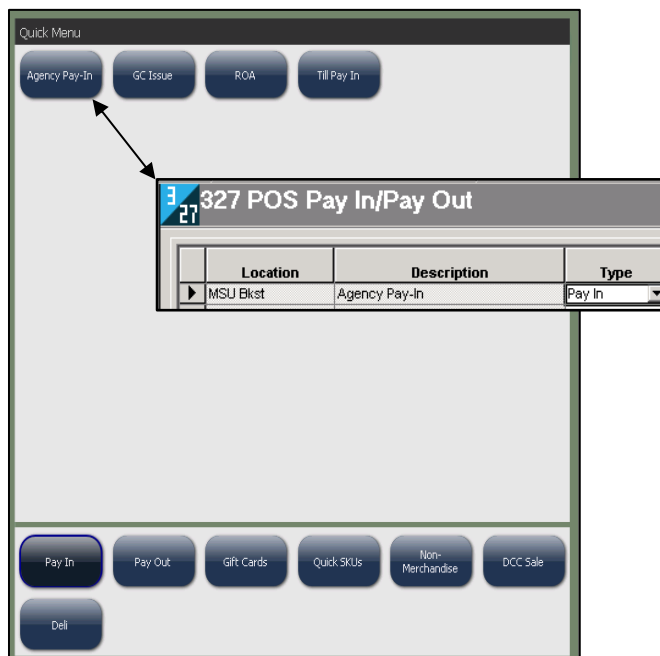
Import WinPrism pages:

- Pay In
- Pay Out
- Gift Cards
- DCC Sale

2. Pages/columns created from Import PrismCore pages have a lock on the folder. These pages can't be edited from this screen.



Note: Underlying items can only be seen at PRISMPOS Register or WP Admin in the appropriate module. Pay In example.



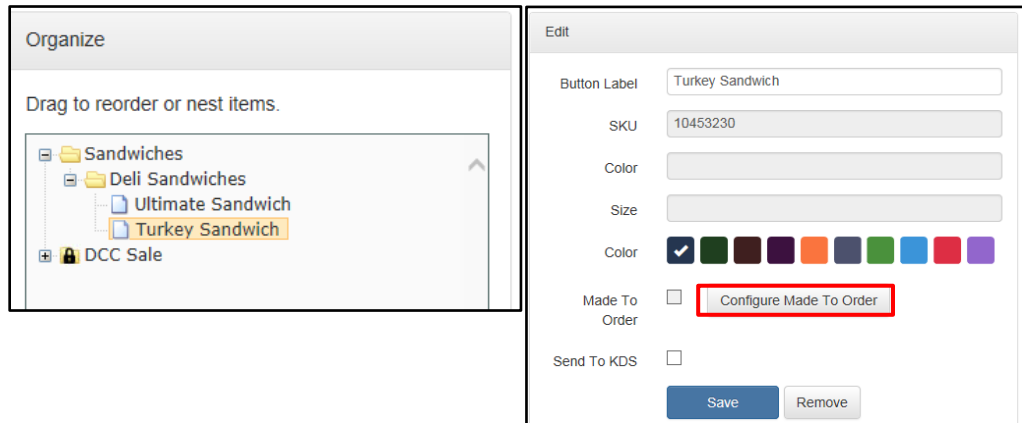
Create Made to Order Page/Column

If there are items you sell that have a variety of options associated, for example, deli items, Made to Order allows input of multiple parameter options for the items.

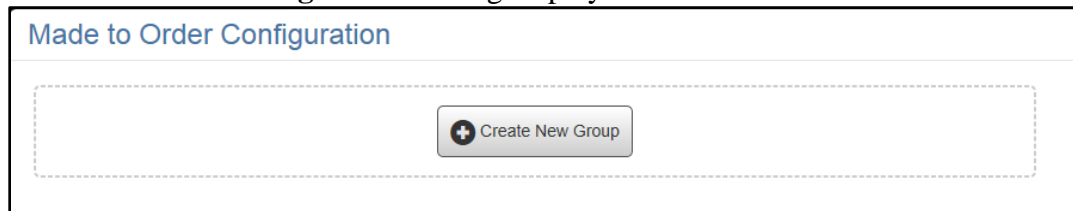
Follow steps 1-10, **Creating Quick SKUs Page/Column**, to set up a page/column for Deli or Kitchen items. Our example page is called Sandwiches with a container called Deli Sandwiches with two sandwiches.

To Create a Made to Order Item:

1. Create the page, search for and select, drag, and drop the item into the page or container.
2. Highlight the item and in **Edit** check **Configure Made to Order** box



3. **Made to Order Configuration** dialog displays.



Determine what options are available for this item. In this example, the first option we want to offer is type of bread.

4. Select **Create New Group**, the **Add Group** dialog displays.

Add Group

Name

Required

Allow Multiple Selections

Back Add Group

- **Name:** Choose a name for the group.
- **Required:** Is this option required? For example, ‘Bread’ might be required, but ‘Additional Toppings’ might be optional.
- **Allow multiple selections:** Does this option will allow for more than one choice. For example, you may only be able to choose one ‘Bread’ type, but you may allow multiple ‘Cheese’ types.

5. Once you have your options set, select **Add Group**. The group now appears.

Made to Order Configuration

Bread Edit Group

Add item

ADDING OPTIONS TO GROUPS

1. Once you have the group added, select **Add Item**.

Add Item

Winprism 360 ?

Search by name or SKU

Name	Price	SKU
Search for an item and click to select it.		

« 1 »

Button Text

Name

SKU

Price

Back Add Item

2. Notice there are two options at the top of the screen.

- **WinPRISM:** This allows you to choose an option that exists as a PrismCore SKU or a PrismCore non-merch item. For example, if you track the inventory of your cheese slices by SKU, you would want to add those SKUs to this order, to track the inventory. Conversely, if you wanted to have an item hit your reports, but not track by SKU, add a non-merchandise item.
- **360:** This allows you to input an option that is NOT tracked within PrismCore. For example, if you want to offer toasted bread, but don't want to track that in inventory, add as a 360 only item.

The screenshot shows a dropdown menu with 'Winprism' and '360' selected. Below the dropdown is a text input field labeled 'Name'.

3. Start with assuming we do not track bread type by SKU. We want to add a 360 only item. Select **360**.
4. Enter the **Name** you want to use. In this case “White Bread”.
5. Click **Add Item**.
6. Continue adding items to this option type until you have added all of your choices.

The screenshot shows a configuration screen for a 'Bread' group. It includes buttons for 'White Bread', 'Wheat Bread', and 'Rye Bread', an 'Add item' button, and a 'Create New Group' button.

7. When finished, add more option types by selecting **Create New Group**, or you select **Save and Close** if you are finished.

8. Add another group, called “Additional Toppings”.

Name	Additional Toppings
Required	<input type="checkbox"/>
Allow Multiple Selections	<input checked="" type="checkbox"/>

9. This group includes a PrismCore item. Select **PrismCore** from the top and enter the name of the item to add in the **Search by** name or SKU field.

lettuce	x	
Name	Price	SKU
Lettuce	\$0.00	10458839

10. Select the correct item it will appear on the right hand side of the screen. You can only change the **Button Text** of this item, since it is a PrismCore SKU.

Button Text	Lettuce
Name	Lettuce
SKU	10458839
Price	\$0.00

11. When finished, select **Add Item**.

12. Continue adding items until this option contains all the available choices.

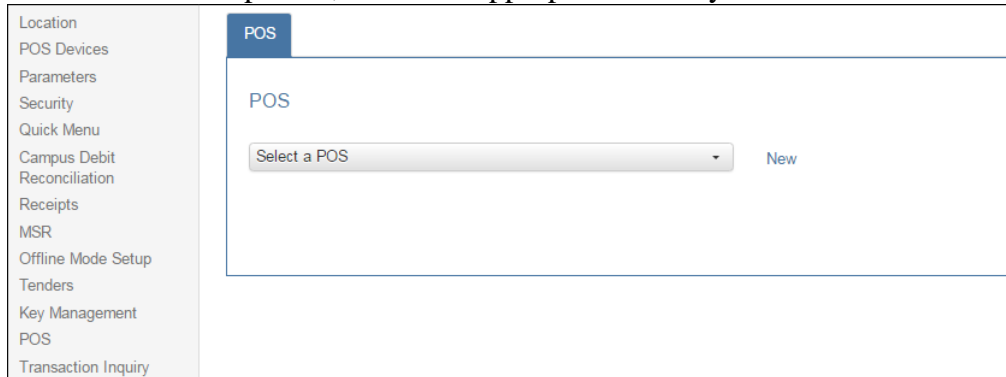
Additional Toppings	Edit Group			
Lettuce	Tomato	Onions	Mayonnaise	Oil

13. Continue adding groups and items until you have added all the options for this **Made to Order** Item.

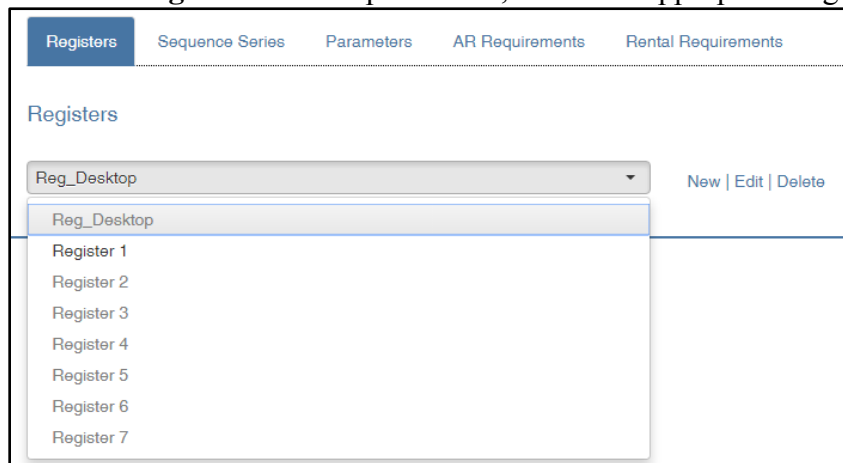
Attach a Quick Menu Profile to a POS Register

After creating a Quick Menu Profile, attach it to the POS Register(s).

1. From the Configuration menu on the left, select **POS**.
2. From the **POS** dropdown, select the appropriate POS system.



3. From the **Register** tab's dropdown list, select the appropriate register.



4. To the right of the Register selection are three options; New | Edit | Delete. Select **Edit**.
5. From the Edit Register dialog displays, half way down on the left is Quick Menu Profile.

6. From the drop down list select the Profile for this register then select **Save Changes**.

Edit Register

Full Name
Register 1

Name
Register 1

Disabled Print After Sale

Logout Timer Use Dual Cash Drawers

Device Id
1

Quick Menu Profile
Main Store

- Demo Profile
- Main Store
- Main Store
- New Profile
- Sandwiches

Type	Terminal ID
CreditCard	0
CBord	
Blackboard	
Atrium	
PosConnectUrl	

Close Save Changes



PrismPOS Register

Two settings control how the Quick Menu displays and works for the profile attached to the register:

After transaction return to:

- **Special Items:** Choose this to return to or start at the **Special Items** screen.
- **360 Home:** Choose this to return PrismPOS home screen.

Menu Type:

- **Classic Special Items:** The button to access the Quick Menu is Special Items and when selected items/pages will as below in Fig. 1.
- **Quick Menu:** The button to access the Quick Menu is Quick Menu and when selected, pages will display as below in Fig. 2.

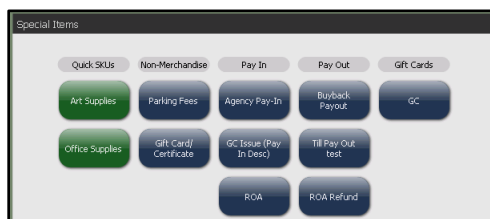


Figure 1

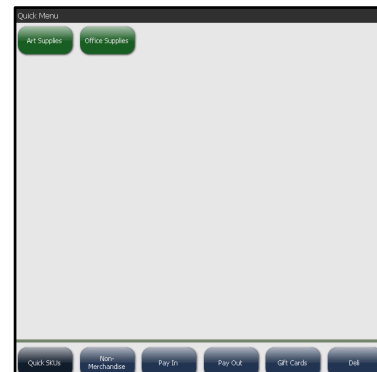


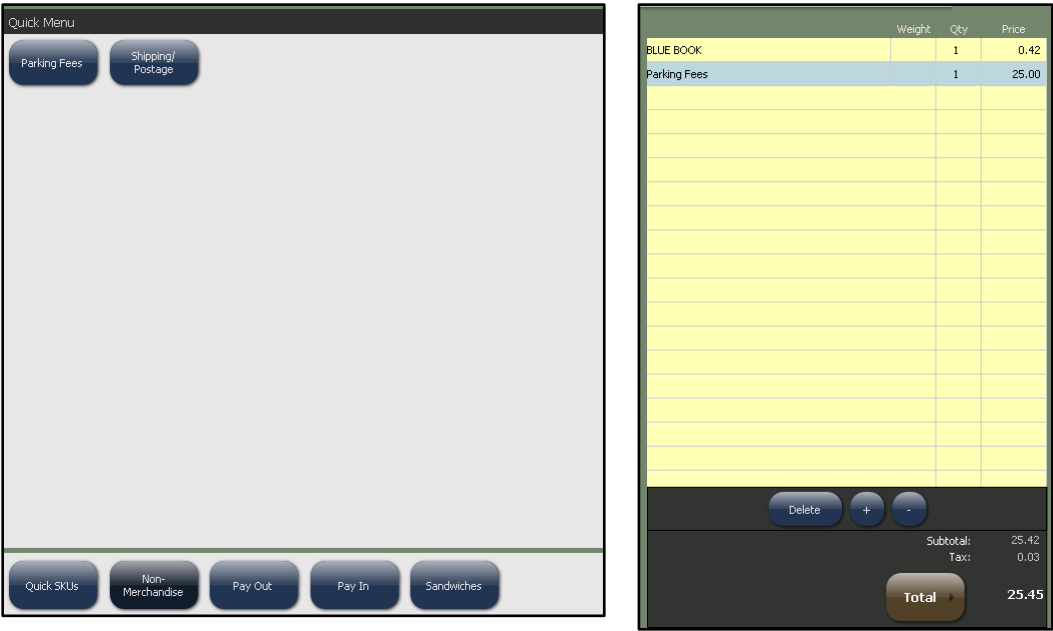
Figure 2

2. The Quick Menu displays in the Detail Frame.



3. The pages created in the profile display in the same order as listed in the profile.
Note: Access Quick Menu, Edit Profile page and drag and drop the pages accordingly to re-arrange them.
4. The choices are listed across the top for the left most page. In this example Containers under the Quick SKUs page.
Note: We know they are Containers because the green color. Although green may be set as a color for an item, the shade is different. You may want to name your Containers distinctively to indicate it is a Container and not an item.
5. To add an item to the transaction, select the appropriate page and then item as necessary.

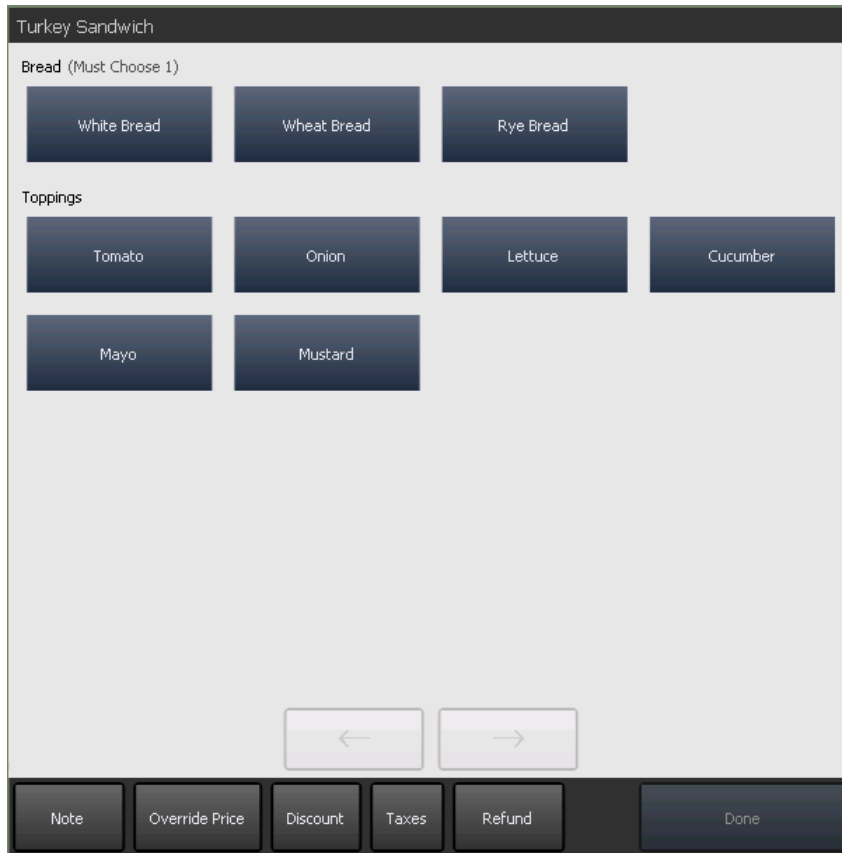
- c. Select the Non Merchandise page; the non merchandise items display and we add Parking Fees to the transaction.



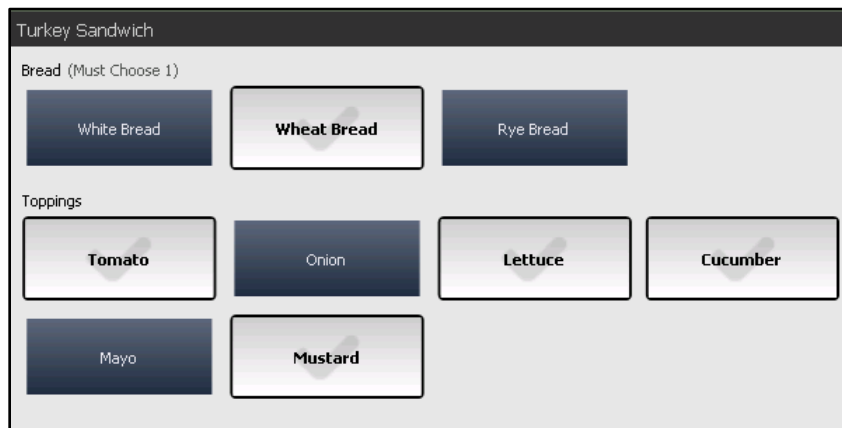
- d. Adding a Made to Order item. Select Sandwiches and Deli Sandwiches display. Select Deli Sandwiches to display Turkey Sandwich.



- e. Select Turkey Sandwich and the Made to Order options will display.



- f. Select the buttons for the appropriate choices. If changes are needed, you can simply unselect the original choice, and select another choice.



- g. On the left, the receipt on screen will show your options as you choose them:

Turkey Sandwich			
Wheat Bread, Tomato, Lettuce, Cucumber, Mustard	1	8.00	

- h. Select the **Done** button in the lower right hand corner of the details frame once all options are selected.
- i. Continue with your sale, total and tender normally.

Sample receipt:



Note: Made to Order items, options selected, also print on the receipt.

Made to Order other Buttons

There are several other buttons at the bottom of the Made to Order page, explained below.



Button	Description
Note	Add a note to the item.
Override Price	Enter a different price than the default price.
Discount	Add a Discount to the item.
Taxes	Change the tax code of the item.
Refund	Refund the item.

